Quick Start: Creating Users Through Frontend

☑ User Management is Already Built Into the Frontend!

You don't need to run any backend scripts. Everything can be done through the web interface.

How to Create Finance Manager User (2 Minutes)

Step 1: Login as Admin

```
URL: http://localhost:3000 (or your frontend URL)
Username: admin
Password: admin123
```

Step 2: Go to Admin Panel

- Click **"Admin"** tab in the top navigation

Step 3: Create Finance User

1. Click **"+ Add User"** button (top right)
2. Fill in the form:

```
Username:      sarah.banda
Password:      password123
Full Name:     Sarah Banda
Email:         sarah@company.zm
Role:          Finance (select from dropdown)
Department:    Finance (select from dropdown)
Is HOD:        ✓ (check the box)
```

3. Click **"Save User"**

Step 4: Test Login

- Logout from admin
- Login as:

```
Username: sarah.banda
Password: password123
```

- You should see the Finance Manager dashboard with pending requisitions!

Create All Required Users (5 Minutes)

Use the same process to create these users:

1. Initiator (Creates Requisitions)

```
Username: john.banda | Password: password123
Role: Initiator | Department: IT
```

2. HOD (Approves Department Requisitions)

```
Username: mary.mwanza | Password: password123
Role: HOD | Department: IT | Is HOD: ✓
```

3. Procurement (Adds Vendors & Pricing)

```
Username: james.phiri | Password: password123
Role: Procurement | Department: Procurement
```

4. Finance Manager (Budget Approval)

```
Username: sarah.banda | Password: password123
Role: Finance | Department: Finance | Is HOD: ✓
```

5. MD (Final Approval & PO Generation)

```
Username: david.mulenga | Password: password123
Role: MD | Department: Executive
```

Features Available in Admin Panel

User Management (Users Tab)

- ☑ **Create** new users with "+ Add User" button
- ☑ **Edit** existing users with "Edit" button
- ☑ **Delete** users with "Delete" button
- ☑ **Reset Passwords** with "Reset Pwd" button
- ☑ **View** all users in sortable table

Vendor Management (Vendors Tab)

- ☑ Create and manage vendors
- ☑ Edit vendor details
- ☑ Delete vendors

Department Management (Departments Tab)

- ☑ Create and manage departments
- ☑ Assign department codes

Current System Users (After Running createFinanceUser.js)

Username	Role	Department	Purpose
admin	Admin	IT	System administration
justine.kaluya	Initiator	Operations	Create requisitions
joe.munthali	HOD	Operations	Approve Operations reqs
anne.banda	HOD	Finance	Approve Finance dept reqs
clarence.simwanza	Procurement	Procurement	Add vendors & pricing
sarah.banda	**Finance**	**Finance**	**Finance approval** ☑
kanyembo.ndhlovu	MD	Executive	Final approval + PO

Complete Workflow Test

After creating all users, test the complete workflow:

1. **Login as john.banda** → Create & submit requisition
2. **Login as mary.mwanza** → Approve as HOD
3. **Login as james.phiri** → Add vendor & pricing, submit
4. **Login as sarah.banda** → Approve for budget
5. **Login as david.mulenga** → Final approval → PO generated! 🎉

Important Notes

Backend vs Frontend

- ✘ **DON'T run** `node scripts/createFinanceUser.js` if you've already created the user through UI
- ☑ **DO use** the Admin Panel for all user management going forward
- The backend script was a one-time fix for missing users

Password Security

- Default passwords are `password123` for all demo users
- ⚠ **Change these** in production!
- Users should reset their passwords on first login

Role Permissions

- Only **admin** role can access Admin Panel
- Only **admin** role can create/edit/delete users
- Regular users cannot see the Admin tab

Troubleshooting

Q: I don't see the Admin tab

- A: Only users with role=admin can see it. Login as `admin / admin123`

Q: "+ Add User" button doesn't work

- A: Make sure you're logged in as admin and on the Users tab

Q: User created but can't login

- A: Use "Reset Pwd" button in Admin Panel to reset their password

Q: Finance user shows "No requisitions found"

- A: Make sure requisitions have been moved to `pending_finance` status by procurement

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Summary

☑ **User management is fully functional in the frontend!**

No backend scripts needed. Just:

1. Login as admin
2. Go to Admin Panel
3. Click "+ Add User"
4. Fill form & save

That's it! The Finance Manager user (and any other user) can be created in under 2 minutes through the UI.

For detailed instructions, see: USER_MANAGEMENT_GUIDE.md

System Status: ☑ Ready to use
Admin Credentials: admin / admin123
Frontend URL: http://localhost:3000