User Manual - System Administrator

Purchase Requisition System v 3.0

Your Role

As **System Administrator**, you manage the system and users.

Responsibilities

- User account management
- System configuration
- Data backup and security
- Technical support
- System monitoring
- Report generation
- Database maintenance

Getting Started

Login

1. URL: **http://localhost:3000**
2. Username: `admin`
3. Password: `admin123`
4. **Change password immediately!**

Admin Dashboard

Overview Panels

- Total users
- Active requisitions
- System health
- Storage usage
- Recent activity
- Error logs

User Management

Viewing All Users

1. Click "Admin" → "User Management"
2. View user list with:

    - Username
    - Full name
    - Role
    - Department
    - Status (Active/Inactive)
    - Last login

Adding New User

1. Click "Add User"
2. Fill details:

    - **Username** (unique, lowercase)
    - **Full Name**
    - **Email**
    - **Department**
    - **Role** (Initiator/HOD/Finance/MD/Procurement/Admin)
    - **Initial Password**

3. Click "Create User"
4. User receives email with credentials

Default Password: `password123`
(User must change on first login)

Editing User

1. Find user in list
2. Click "Edit"
3. Update:

    - Name
    - Email
    - Department
    - Role

4. Click "Update"

Note: Cannot change username

Resetting Password

1. Find user
2. Click "Reset Password"
3. Choose:

   - **Auto-generate** - System creates password
   - **Manual** - You set password

4. Click "Reset"
5. Provide new password to user securely

Deactivating User

1. Find user
2. Click "Deactivate"
3. Confirm action
4. User cannot login
5. Data retained

Reactivating:

- Click "Activate" to restore access

Deleting User

1. Find user
2. Click "Delete"
3. Confirm deletion
4. **Warning:** Permanent action
5. Historical data remains but user removed

Use sparingly - Prefer deactivation

Role Management

System Roles

Role	Capabilities
Initiator	Create requisitions
HOD	Approve department requests
Finance	Budget approval
MD	Final authorization
Procurement	Process orders, create POs
Admin	Full system access

Assigning Roles

1. Edit user
2. Select role from dropdown
3. Save changes
4. Role effective immediately

Multiple Roles

Users can have combined roles:

- HOD + Initiator
- Finance + Admin
- Procurement + Initiator

Department Management

Adding Department

1. Go to "Departments"
2. Click "Add Department"
3. Enter:

   - Department name
   - Department code
   - Budget allocation
   - HOD assignment

4. Click "Save"

Managing Departments

- Edit department details
- Assign HODs
- Set budget allocations
- View department statistics

System Configuration

General Settings

1. Go to "Settings" → "General"
2. Configure:

   - **Company Name**
   - **Company Logo**
   - **Contact Information**
   - **System Email**
   - **Timezone**
   - **Currency** (ZMW default)

Email Configuration

1. Go to "Settings" → "Email"
2. Configure SMTP:

   - Server address
   - Port
   - Username
   - Password
   - Encryption (TLS/SSL)

3. Test email sending
4. Save settings

Approval Workflow

1. Go to "Settings" → "Workflow"
2. Configure:

   - Approval sequence
   - Authority limits
   - Timeout periods
   - Escalation rules

3. Save changes

Default Flow:

```
Initiator → HOD → Finance → MD → Procurement
```

Notification Settings

Configure notifications:

- Email templates
- SMS alerts (if configured)
- In-app notifications
- Frequency settings

Budget Management

System-Wide Budgets

1. Go to "Admin" → "Budgets"
2. View all department budgets
3. Actions:

   - Add new budget
   - Edit allocations
   - View utilization
   - Generate reports

Budget Codes

Manage budget codes:

1. Go to "Budget Codes"
2. Add/edit codes
3. Assign to departments
4. Set amounts
5. Track usage

FX Rate Management

Updating Exchange Rates

1. Go to "Settings" → "FX Rates"
2. Click "Update Rate"
3. Enter:

   - USD to ZMW rate
   - Effective date

- Source

4. Save

Best Practice: Update weekly or when significant changes

Rate History

- View historical rates
- Track changes
- Export rate data

Data Management

Backup Database

Manual Backup:

1. Go to "Admin" → "Backup"
2. Click "Create Backup"
3. System creates backup file
4. Download to secure location
5. Label with date

Backup includes:

- All requisitions
- User data
- Budgets
- Purchase orders
- Uploaded files

Backup Schedule:

- Daily: Automated (if configured)
- Weekly: Manual verification
- Monthly: Archive backup

Restore Database

1. Go to "Admin" → "Restore"
2. Upload backup file
3. Confirm restore
4. **Warning:** Overwrites current data
5. System restarts

When to Restore:

- Data corruption
- Accidental deletion
- System migration
- Testing purposes

Data Export

Export data:

1. Go to "Reports" → "Data Export"
2. Select:

    - Date range
    - Data type
    - Format (Excel/CSV)

3. Click "Export"
4. Download file

System Monitoring

Activity Logs

View all system activity:

1. Go to "Admin" → "Activity Logs"
2. Filter by:

    - User
    - Action type
    - Date range
    - Module

3. Export logs

Logged Actions:

- Login/logout
- Requisition creation
- Approvals/rejections
- PO creation

- Configuration changes
- User management

Error Logs

Monitor errors:

1. Go to "Admin" → "Error Logs"
2. View:

   - Error type
   - Timestamp
   - User affected
   - Stack trace

3. Troubleshoot issues

Performance Monitoring

Track:

- Page load times
- Database queries
- Server response
- User sessions
- Storage usage

File Management

Uploaded Files

1. Go to "Admin" → "Files"
2. View all uploads
3. Actions:

   - View file
   - Download
   - Delete (if orphaned)
   - Check integrity

Storage Management

Monitor:

- Total storage used
- Files by type
- Large files
- Orphaned files

Cleanup:

- Remove orphaned files
- Archive old files
- Compress large files

Reports and Analytics

System Reports

Generate:

- User activity report
- Requisition statistics
- Department performance
- Budget utilization
- System usage trends
- Approval efficiency

Custom Reports

Create custom reports:

1. Go to "Reports" → "Custom"
2. Select:

   - Data sources
   - Fields
   - Filters
   - Grouping

3. Save template
4. Schedule automatic generation

Security

Password Policy

Configure:

1. Go to "Settings" → "Security"
2. Set:
    - Minimum length
    - Complexity requirements
    - Expiration period
    - History count

3. Enforce for all users

Session Management

Settings:

- Session timeout
- Concurrent sessions
- Remember me duration
- Force logout

Access Control

Review:

- Failed login attempts
- Suspicious activity
- IP restrictions (if needed)
- Role permissions

Maintenance

Regular Tasks

Daily:

- Check error logs
- Monitor system performance
- Review backup status
- Check user issues

Weekly:

- User access review
- Database optimization
- Storage cleanup
- Security audit

Monthly:

- Full system backup
- Performance report
- User activity analysis
- Software updates

Database Maintenance

1. Go to "Admin" → "Database"
2. Tasks:

    - **Optimize** - Improve performance
    - **Repair** - Fix issues
    - **Analyze** - Check health
    - **Vacuum** - Reclaim space

System Updates

When updates available:

1. Backup system first
2. Download update
3. Read release notes
4. Apply in test environment
5. Deploy to production
6. Verify functionality
7. Monitor for issues

Troubleshooting

Common Issues

Users Cannot Login:

1. Check account status (active?)
2. Verify password
3. Check session limits
4. Review error logs
5. Reset password if needed

System Slow:

1. Check database size
2. Optimize database
3. Clear old logs
4. Check server resources
5. Review recent changes

Email Not Sending:

1. Verify SMTP settings
2. Test connection
3. Check credentials
4. Review email logs
5. Verify firewall rules

Files Not Uploading:

1. Check storage space
2. Verify file size limits
3. Check file permissions
4. Review error logs
5. Test with small file

Support

Providing User Support

Process:

1. Receive support request
2. Gather information:

   - Username
   - Issue description
   - Error messages
   - Steps to reproduce

3. Check logs
4. Test in admin account
5. Resolve or escalate
6. Document solution

Escalation

When to Escalate:

- System-wide issues
- Security concerns
- Data corruption
- Critical bugs
- Performance problems

Contact:

- IT Department
- Software Vendor
- Database Administrator
- Security Team

Best Practices

Security

- Change default passwords
- Review user access regularly
- Monitor suspicious activity
- Keep software updated
- Backup regularly
- Use strong passwords
- Document changes

Performance

- Optimize database monthly
- Clean up old files
- Monitor storage
- Archive old data
- Review slow queries
- Update statistics

Documentation

- Document all changes
- Maintain user list
- Record issues/solutions
- Update procedures

- Keep configuration notes

Quick Reference

Daily Checklist

- [ ] Check error logs
- [ ] Review failed logins
- [ ] Monitor system performance
- [ ] Check backup status
- [ ] Review support tickets

Emergency Contacts

- **System Vendor:** vendor@company.com
- **IT Support:** it@company.com
- **Database Team:** dba@company.com

Key Shortcuts

- Ctrl + U: User management
- Ctrl + L: View logs
- Ctrl + B: Create backup
- Ctrl + R: Reports

System Information

Current Version

- **Version:** 3.0.1
- **Database:** SQLite
- **Backend:** Node.js + Express
- **Frontend:** HTML/CSS/JavaScript

Server Details

- **Backend Port:** 3001
- **Frontend Port:** 3000
- **Database Location:** backend/requisitions.db

File Locations

- **Uploads:** backend/uploads/
- **Logs:** backend/logs/
- **Backups:** ../purchase-requisition-backups/

End of Admin Manual

Complete documentation package available:

- MANUAL_INITIATOR.pdf
- MANUAL_HOD.pdf
- MANUAL_FINANCE.pdf
- MANUAL_MD.pdf
- MANUAL_PROCUREMENT.pdf
- MANUAL_ADMIN.pdf

Version: 3.0