CLUSTER TRAINING FOR THE PROVINCIAL ROLL-OUT OF LGU INTEGRATED FINANCIAL TOOLS (LIFT)

Bayview Park Hotel Manila

INSTALLATION PROCEDURE

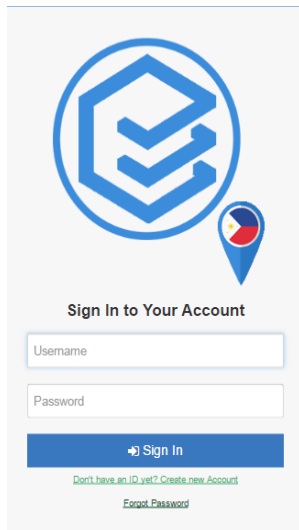# Navigating the eSRE Central System

Log In/Out

My Account

User Registration and Approval
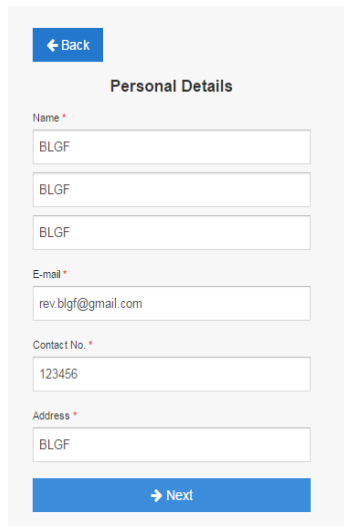
Change Password

Forgot Password

Create New Account

1. Enter **URL** on the web address of the browser. *Sign In* page will be displayed.
2. Click **Don't have an ID yet? Create new account.**
3. Fill up the necessary information in the **Personal and Account Details.**
4. In the account details, LGUs may have an option to register for specific role.
5. Then click **Yes** then **OK.**

Sign In to Your Account

Username

Password

➡ Sign In

Don't have an ID yet? Create new Account

Enter your Email below to reset your password

Username

Email

✉ Submit

Back

Forgot Password

1. Click **Forgot Password** on the log in page. *Forgot Password* window will be displayed.
2. Enter **Username.**
3. Enter **Email.**
4. Click **Submit.**
5. Open email to authenticate the request.

Reminders

- Password must be at least 8 characters long.
- All user registrations shall be approved by the Central System Administrator.
- The system will email the user of his/her system-generated username (firstname.lastname) upon approval of the account.
- Since the system allows for sharing of email addresses, you need to specify your username and email when resetting a forgotten password.

6

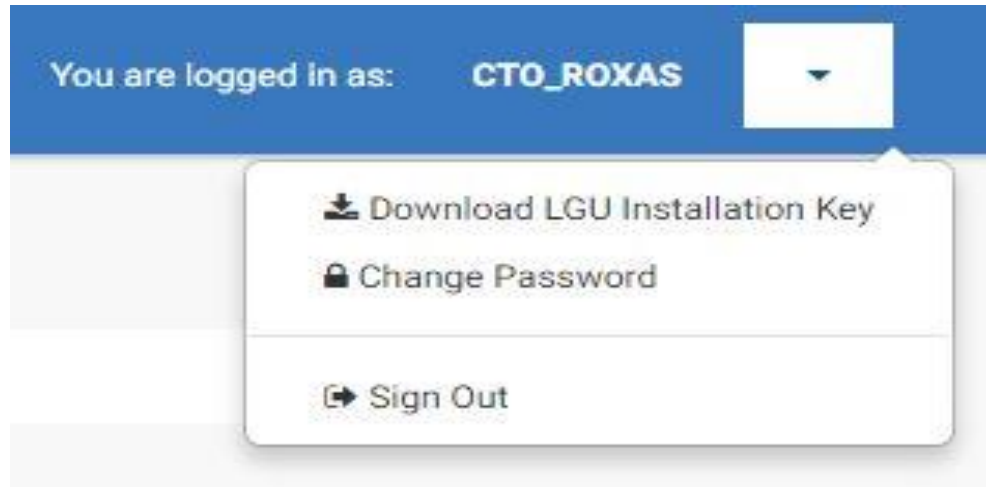# Navigating the eSRE LGU System

LGU System Installation

Log In/Out

My Account

Change Password

Forgot Password

LGU System Administrator

1. Log in to Central System using your newly registered LGU System Administrator account.
2. Click **Arrow down icon** on the upper right of the page.
3. Click **Download LGU Installation Key.** *LGU Installation Key* will be downloaded.

Reminders

- This function is available to Treasurers, Budget Officers, Assessors and LGU System Administrators.

- Download an installation key to install the eSRE LGU System.

- The LGU System Administrator has the privilege to create user accounts within his/her LGU System.

- When a Treasurer/Budget Officer/Assessor downloads a key, he/she is also granted the LGU System Administrator role.
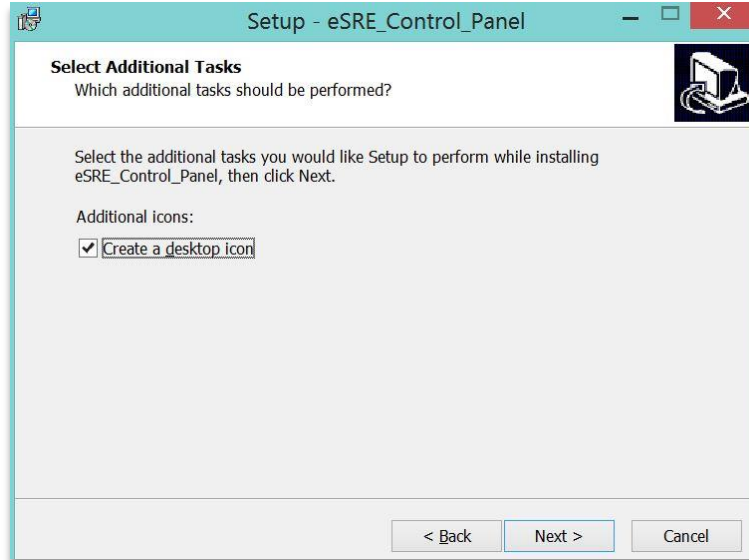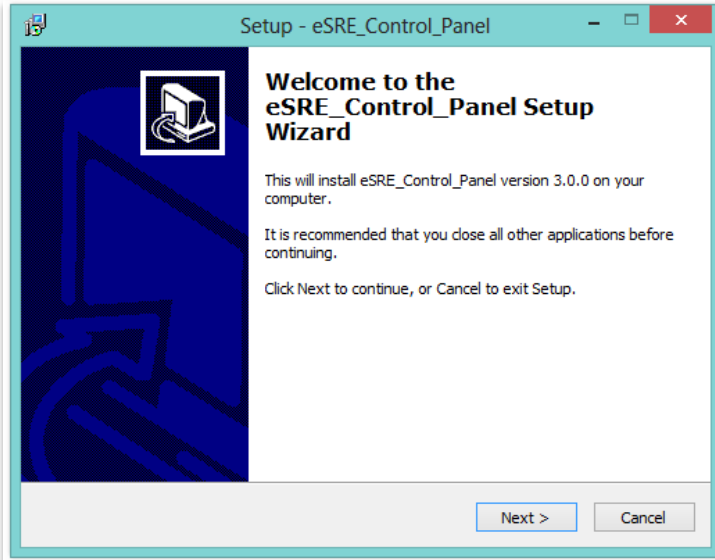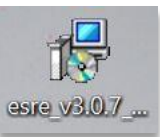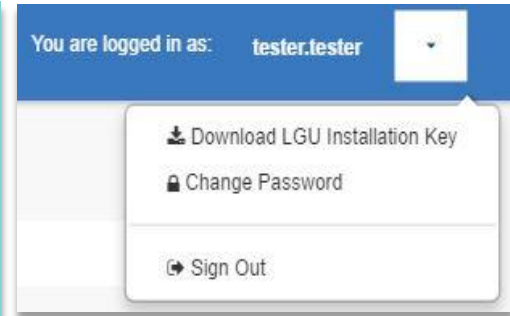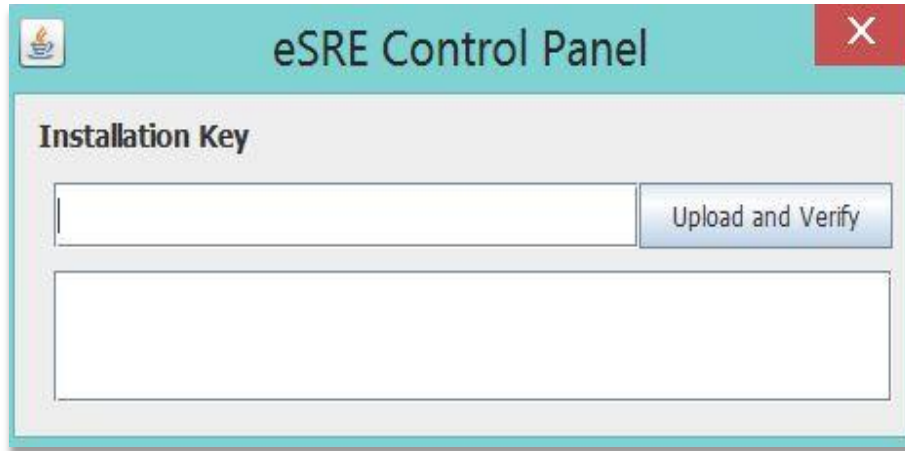
1. Open eSRE_Control_Panel Setup on your desktop. *Control Panel* setup will be displayed.
2. Click **Next.** *Additional Tasks* will be displayed.
3. Check **Create a desktop icon**.
4. Click **Next.** *Ready to Install* will be displayed.
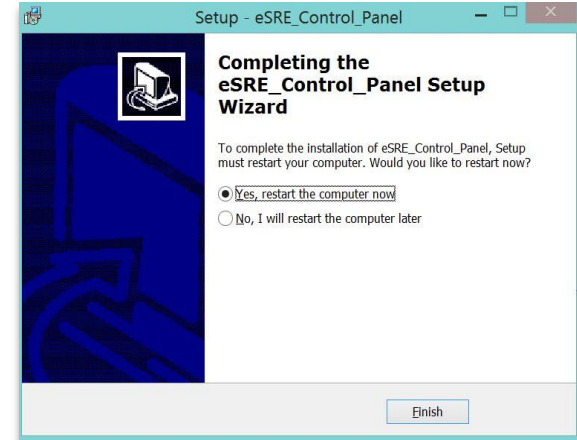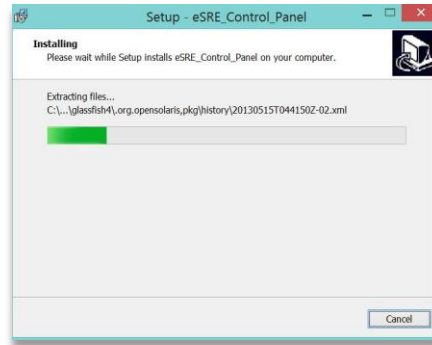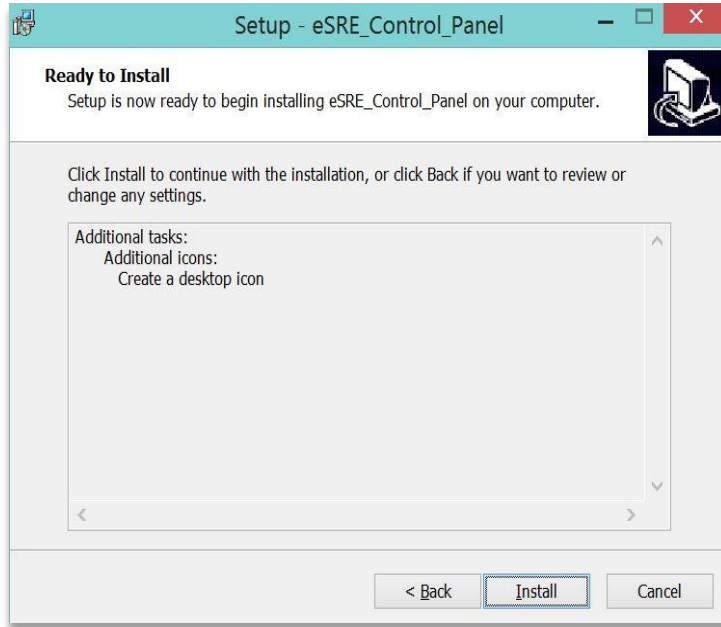
1. Click **Install.** *Preparing to install* will be displayed.
2. Wait the installation to be finished. *Completing Installation* will be displayed.
3. Select **Yes, restart the computer now.**
4. Click **Finish.** *User's unit* will be restarted.

1. After restarting your unit, open eSRE Control Panel Setup . *Installation Key* window will be displayed.
2. Download the installation key first from eSRE Central to upload and verify..
3. Open eSRE Central on your browser.
4. Click **Arrow down** on the upper right header of the page. *Sub-menu* will be displayed.
5. Click **Download LGU Installation Key.** *LGU Installation Key* will be automatically download.
6. Upload the **LGU Installation Key** files from **Installation Key** window.
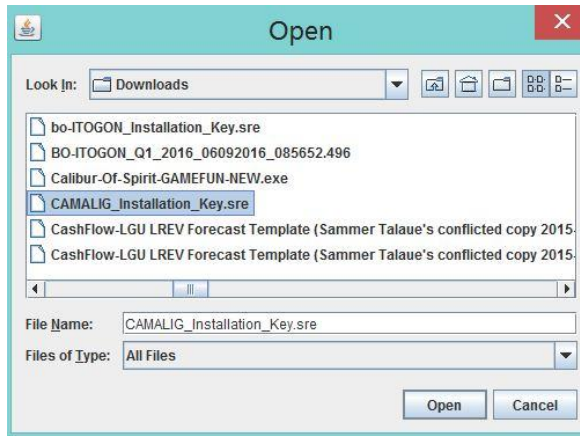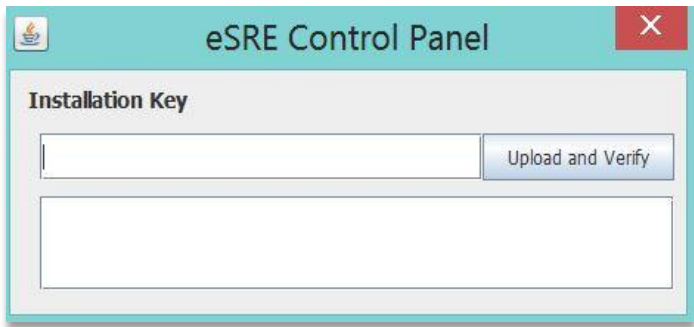
1. Click **Upload and Verify.** *Open/File Upload* window will be displayed.
2. Select the **downloaded installation key.**
3. Click **Open.** *Installation Key checking and Installing eSRE* will be displayed.
4. Wait until the **installing** has finished and the **Installation complete** message is displayed on Installation Key window.
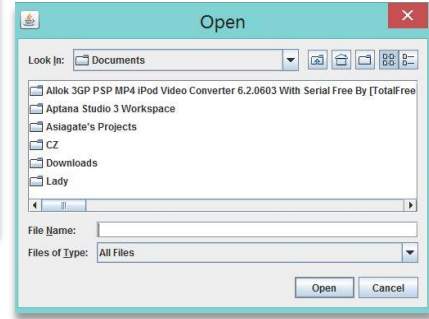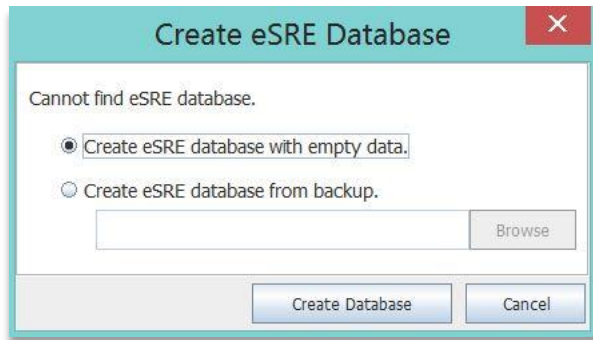
1. Click **X.** *Control Panel* will be displayed. *Create Database* will be displayed.
2. Select **Create eSRE database** with empty data for new database
3. Select **Create eSRE database** from backup if you have existing database for the older version.
    - Click **Browse.** *Open/File Upload* window will be displayed.
    - Select **Database File** to be upload.
    - Click **Open.**
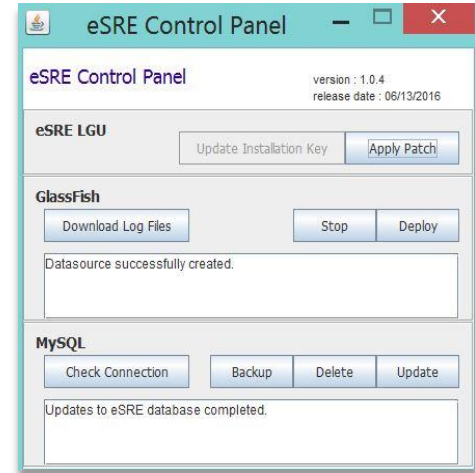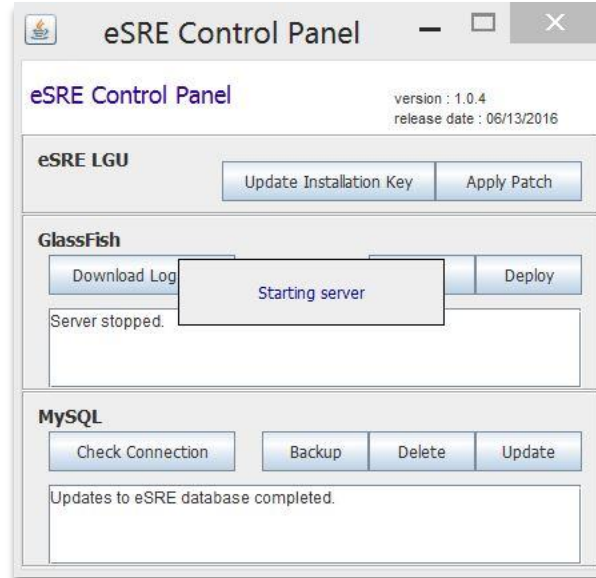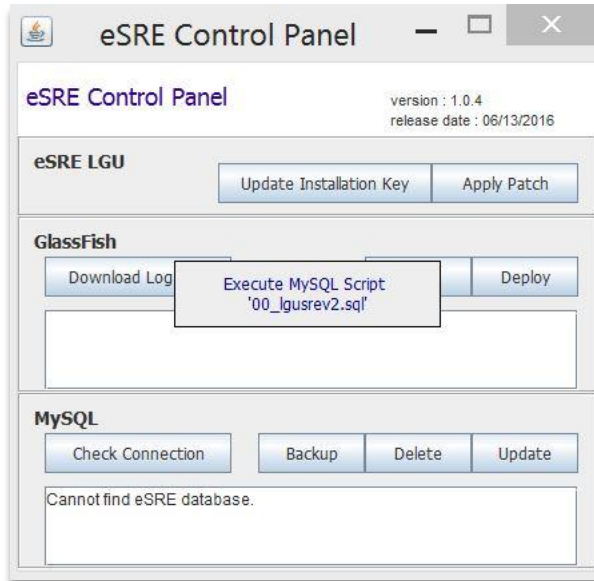
1. Click **Create Database.** *Execute MySQL Script* will be displayed.
2. Wait until finished.
3. After upload **database,** *Starting Server* will be displayed.
4. Wait until finished. *Data source successfully created* will be displayed.
5. Click *Deploy*
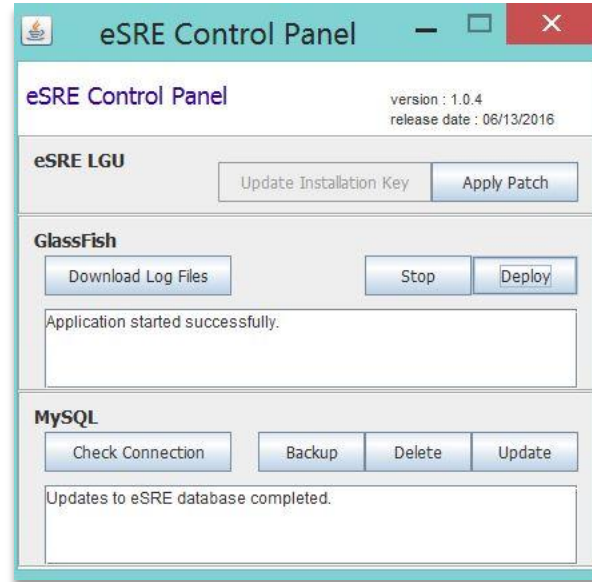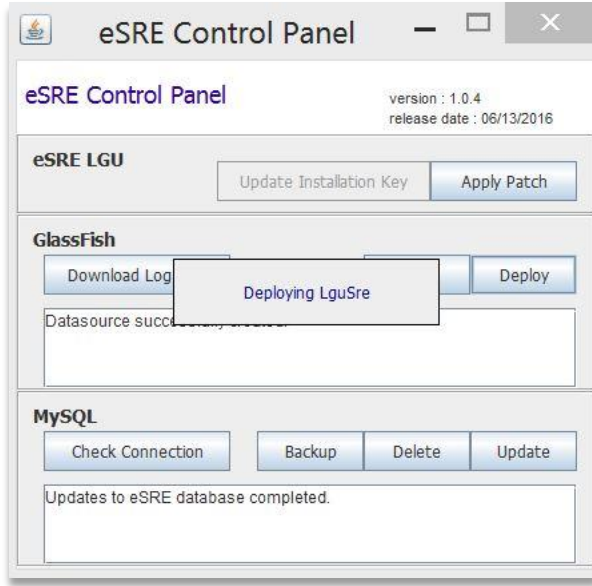
6. *Deploying LguSRE* will be displayed.
7. Wait until finished.
8. You can now Log In to eSRE LGU System using the username and password when you downloaded the installation key.
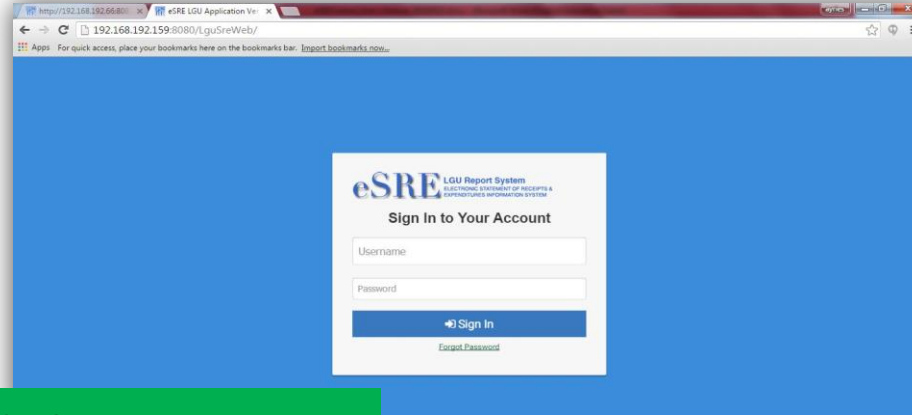
Reminders

- If workstation has an existing eSRE v2.x, run uninstall process of eSREv2.x.
- If workstation has an existing eSRE v3.x, use the eSRE Control Panel to update application and/or data.
- eSRE v3.x has a separate uninstall process.

URL:

localhost:8080/lguWeb

LGU System Administrator

1. Enter **URL** on the web address of the browser. *Sign In* page will be displayed.
2. Enter **Username.**
3. Enter **Password.**
4. Click **Sign In.**

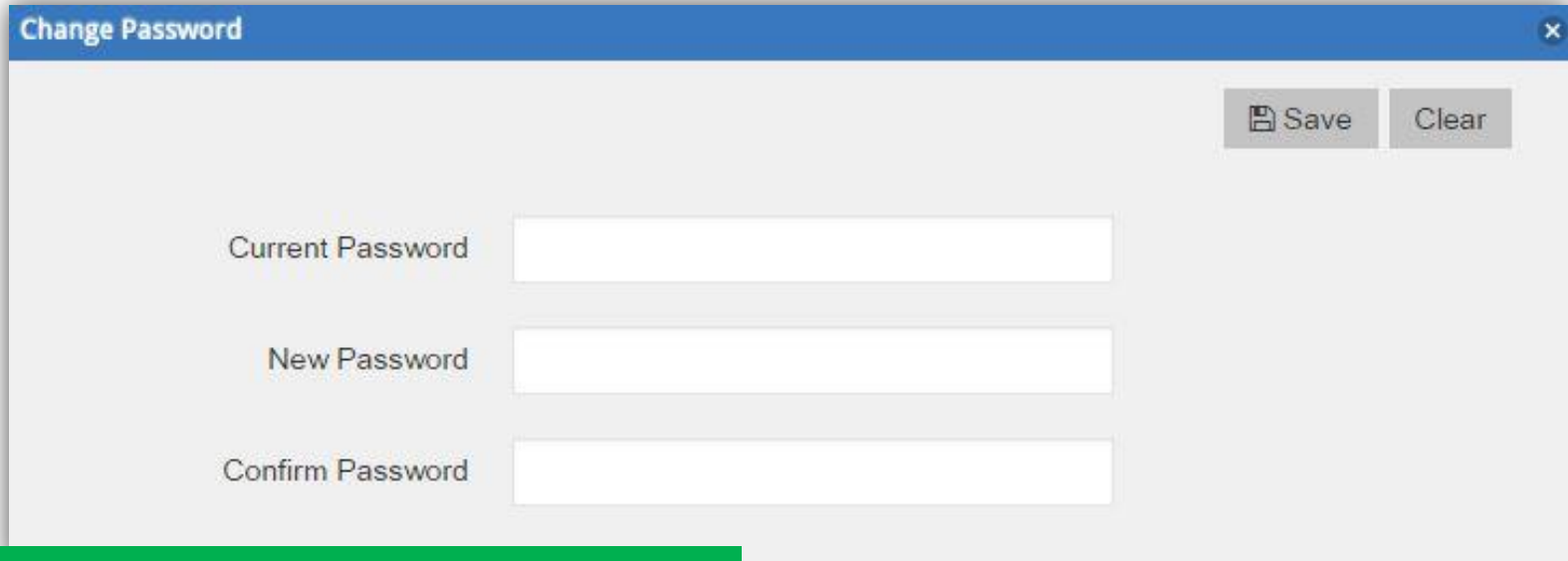**Personal Information**

🏠 Home / Personal Information

Roles
Assessor
Budget Officer
Treasurer

1. Click **Name** on the upper right of the page. *Personal Information* page will be displayed.

LGU System Administrator

1. Click **Arrow down icon** on the upper right of the page.
2. Click **Change Password.** *Registered User* window will be displayed.

3. Enter **Current Password.**
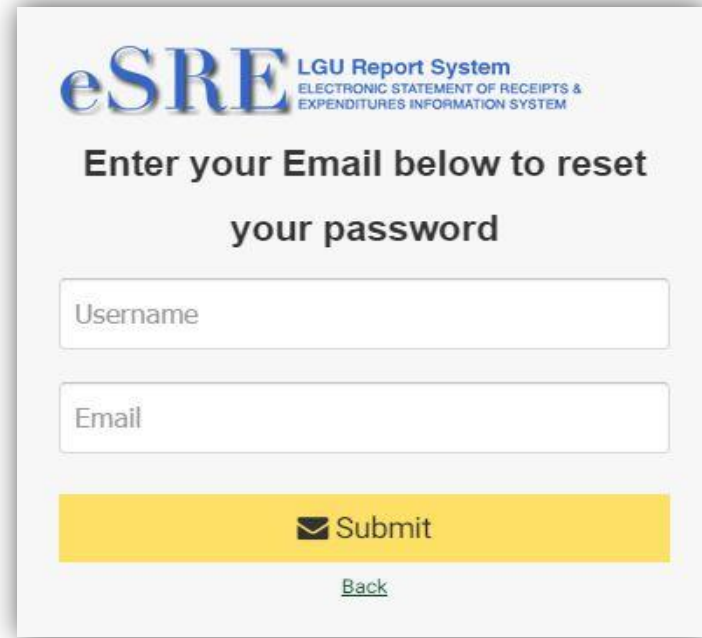4. Enter **New Password.**
5. Enter **Confirm New Password.**
6. Click **Save.**

LGU System Administrator

1. Click **Sign Out** on the upper right of the page. *Log In* page will be displayed.

LGU System Administrator

1. Click **Forgot Password** on the log in page. *Forgot Password* window will be displayed.
2. Enter **Username.**
3. Enter **Email.**

4. Click **Submit.**
5. lick **Log Out** on the upper right of the page. *Log In* page will be displayed.

LGU System Administrator

1. Click **User Management > Users.**
2. Click **Add Record**.
3. Enter **Password and other user details.**
4. Select Active to Yes if user is an active user or No, to deactivate the user account.
5. Click **Add Role.**
6. Select **Role**
7. Click **Save.**
8. Click **Yes**.

Managing User Accounts

View List of Users

1. Click **User Management on the left menu.** Sub-menu will be displayed.
2. Click **Users** on the sub-menu. *Users* page will be displayed.

Search a User

1. Click **User Management on the left menu.** Sub-menu will be displayed.
2. Click **Users** on the sub-menu. *Users* page will be displayed.
3. Enter **Full Name.**
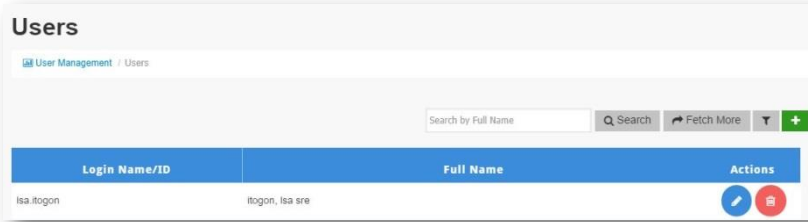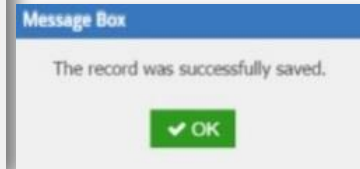4. Click **Search.** Records will be displayed based on the search input.

Advance Search of a User

1. Click **User Management on the left menu.** Sub-menu will be displayed.
2. Click **Users** on the sub-menu. *Users* page will be displayed.
3. Click Show/Hide Advance Search. Fields to be used as criteria for advance search will be displayed.
4. Enter Login Name/ID.
5. Click Search. Records will be displayed based on the search input.

Add a User

1. Click **User Management on the left menu.** Sub-menu will be displayed.
2. Click **Users** on the sub-menu. *Users* page will be displayed.
3. Click Add User. Users window will be displayed.
4. Enter Login Name/ID. Enter Password.
5. Enter First Name. Enter Middle Name. Enter Last Name.
6. Enter Email.
7. Enter Designation.
8. Select Active.
9. Click Add Role. New Field will be displayed. Select Role.
10. Click Add Role to add more.
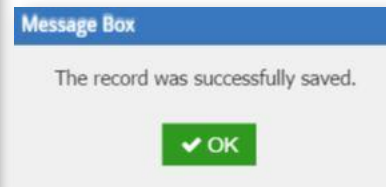11. Repeat steps. Click Save. Message Box will be displayed.
12. Click Ok.

Edit a User

1. Click **User Management on the left menu.** Sub-menu will be displayed
2. Click **Users** on the sub-menu. *Users* page will be displayed.
3. Click **Edit (Pencil Icon).** *Users* window will be displayed.
4. Edit **fields** as necessary.
5. Click **Save.** *Message Box* will be displayed.
6. Click **Ok.**

Users

User Management / Users

Search by Full Name | Q Search | Fetch More | ▼ | +

Login Name/ID	Full Name	Actions
lsa.itogon	itogon, lsa sre	✏ 🗑

Confirmation Box

Do you want to delete the record?

No ✔ Yes

Message Box ✖

The record was successfully deleted.

✔ OK

Delete a User

1. Click **User Management on the left menu.** Sub-menu will be displayed
2. Click **Users** on the sub-menu. *Users* page will be displayed.
3. Click **Delete (Trash Icon).** *Confirmation Box* will be displayed.

4. Click **Yes.** *Message Box* will be displayed. **"Do you want to delete the record?"**
5. Click **Ok.** *Record* will be deleted.

Thank you!