



DEPARTMENT OF FINANCE
BUREAU OF LOCAL GOVERNMENT FINANCE

Navigating the LGU System



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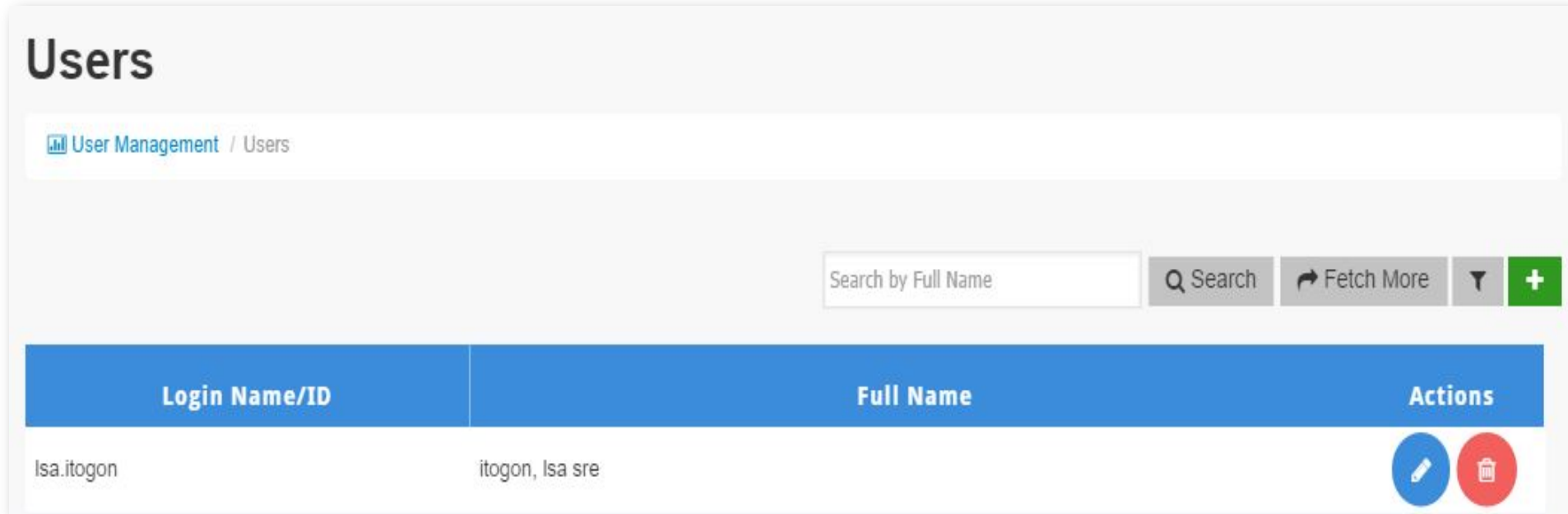


Managing User Accounts

LGU System Roles



Type	Function
Encoder	Encodes report details in the system.
Reviewer	Reviews encoded data.
Approver	Approves encoded data. Triggers Packaging of Reports to be uploaded in the eSRE Central System.





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.

Users

User Management / Users

Search by Full Name Q Search ↶ Fetch More ⌵ +

Login Name/ID	Full Name	Actions
Isa.itogon	itogon, Isa sre	 

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.



The image displays two overlapping screenshots of a web application's user management interface. The top-left screenshot shows the 'Users' page with a search bar and a table of users. The bottom-right screenshot shows the 'User Management' form for editing a user.

Users Page:

- Header: Users
- Breadcrumbs: User Management / Users
- Search: Search by Full Name, Search, Fetch More, Filter, Add
- Form: Login Name/ID
- Table:

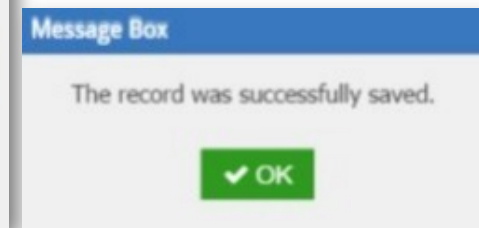
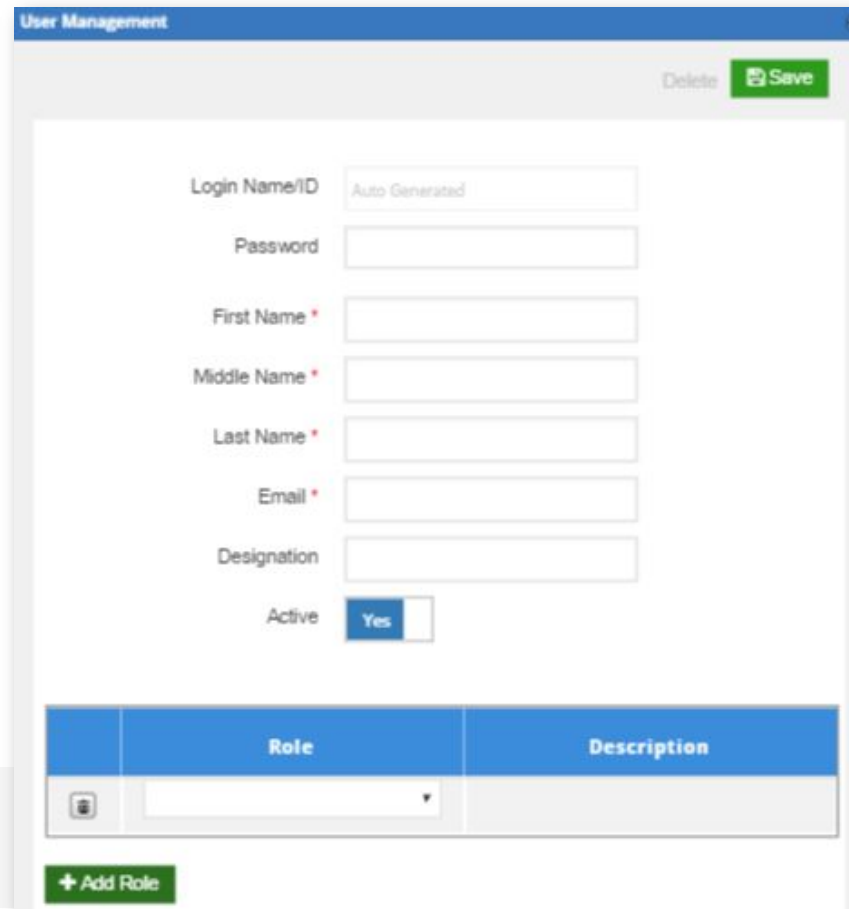
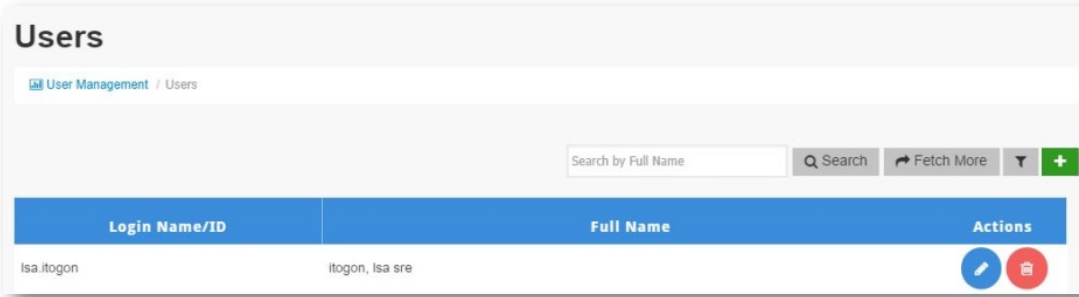
Login Name/ID	Full Name
isa.itogon	itogon, isa sre

User Management Form:

- Header: User Management, Delete, Save
- Fields: Login Name/ID (igü.approver), Password, First Name (Igu), Middle Name (treasurer), Last Name (Approver), Email (barlaanmayann@gmail.com), Designation, Active (Yes)
- Footer: Role (TREASURER_APPROVER), Description (Treasurer)

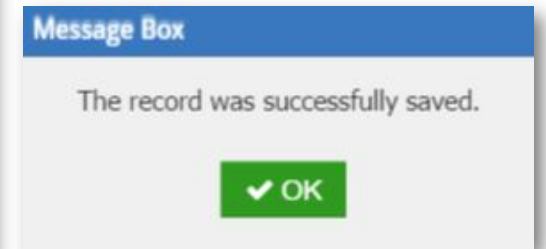
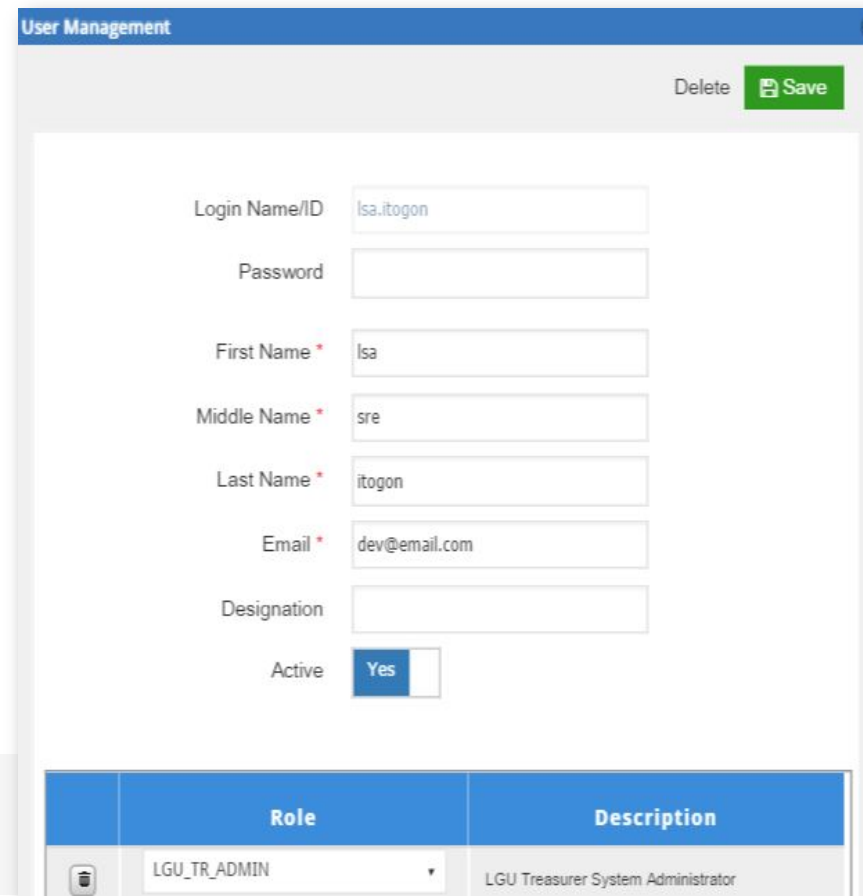
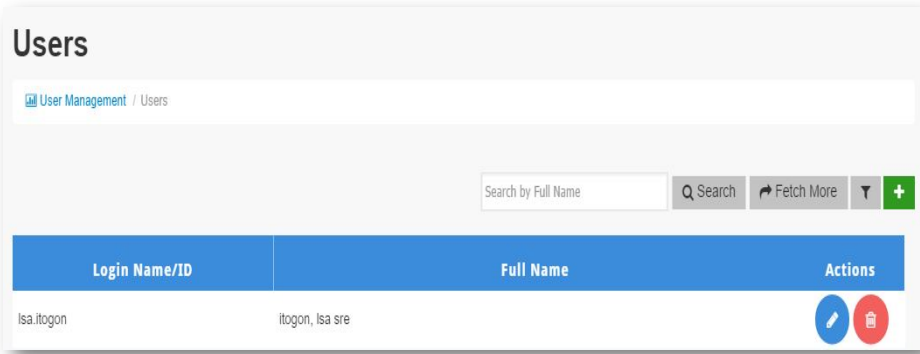
Advance Search of a User

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.



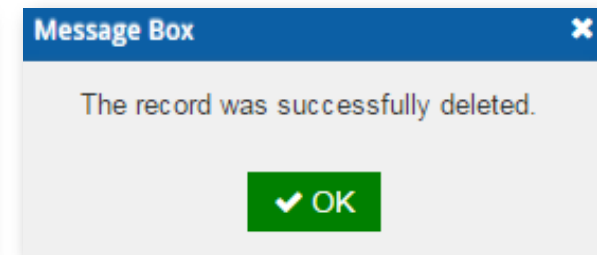
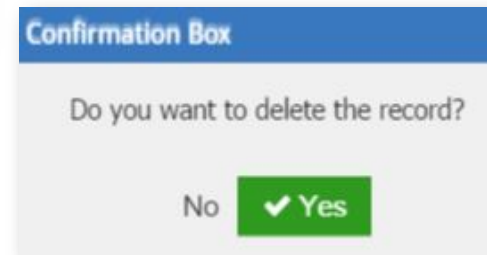
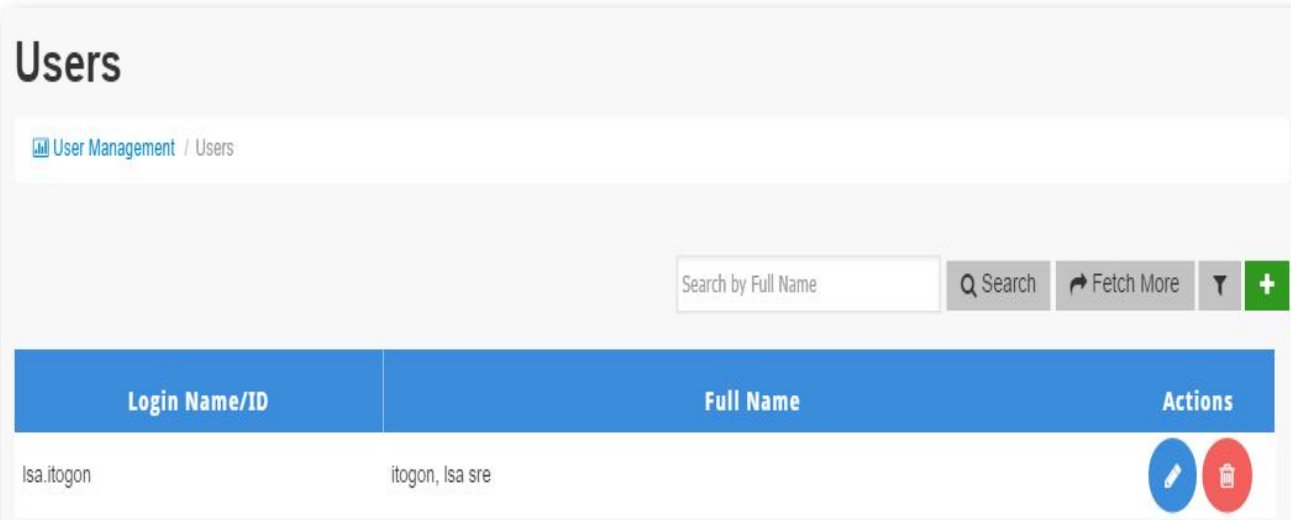
Add a User

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**.



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.



Report Period

Report Period

Report Period

Search by Year (YYYY)

Search

Fetch More



Period	Year	Quarter	Install Type	Status	Actions
2016-1	2016				
2012-1	2012				
2009					

Message Box

The record was successfully saved.

OK

Report Period

Delete

Save

Notes to Financial

+ Add Depository Account

Year * 2017

Quarter * Select Quarter

Install Type TR BO AS

Status * Open

Region Region X

Province LANAO DEL NORTE

City / Municipality MAGSAYSAY

LGU Type MUNICIPALITY

LGU Code 103511000

LGU Classification FIFTH



Report Period

1. Click **Report Period**.
2. Click **Add Record**.
3. Select **Year**.
4. Select **Quarter**.
5. Select **Status**.
6. Click **Save**.

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Report Period Status



Role	Access
Encoder	<ul style="list-style-type: none">▶ Can create period and set status to “Open”▶ Can change status from “Open” to “For Review”
Reviewer	<ul style="list-style-type: none">▶ Can create period and set status to “Open”▶ Can change status from “Open” to “For Review”▶ Can change status from “For Review” to “For Approval”▶ Can change status from “For Review” to “Open”
Approver	<ul style="list-style-type: none">▶ Can create period and set status to “Open”▶ Can change status from “Open” to “For Review”▶ Can change status from “For Review” to “For Approval”▶ Can change status from “For Approval” to “Approved”▶ Can change status from “Approved” to “Open”▶ Can change status from “For Approval” to “Open”▶ Can change status from “For Review” to “Open”



Reminders

- Report Period must be opened first before encoding.
- Treasurer, Budget Officer and Assessor has to open their own report periods.
- Disposition of Proceeds, Notes to Financial and Depository Accounts can be edited by Treasurer Approver.
- Editing of Disposition of Proceeds requires password to be provided by the Central Approver through a phone call.



Thank you!