

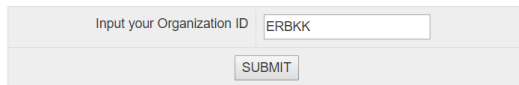
Essential Cloud ERP User Guide

Overview and Administration

1 INTRODUCTION

Essential Cloud ERP is targeted at small and medium businesses, clubs, hospitals, educational institutions, large corporations, etc. In this document, we first show how to access the Main Menu of *Essential Cloud ERP*. Thereafter, we explain in detail the functions of the Administrator, and simultaneously the Main Menu itself. Remember that when we created your organization's *Essential Cloud ERP* account, we furnished you with your organization's unique **Organization ID**. Your organization's account also has an **Administrator**.

In order to access the Main Menu, visit *host.essentialclouderp.com*. You will now be asked to input your Organization ID (Figure 1).



A screenshot of a web form. At the top, it says "Input your Organization ID" followed by a text input field containing the text "ERBKK". Below the input field is a "SUBMIT" button.

Figure 1

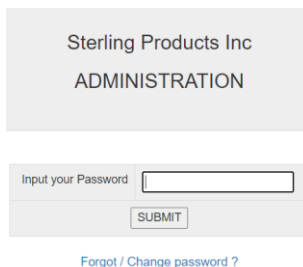
Input the same and click **SUBMIT**. You will now be presented with the **Main Menu**:-



A screenshot of the main menu. At the top, it says "Sterling Products Inc" and "Essential Cloud ERP". Below this are four buttons: "ADMINISTRATOR", "EMPLOYEES", "DEVELOPERS", and "SERVICES".

Figure 2

In order to access the **Admin Menu**, the Administrator should click **ADMINISTRATOR**, whereupon he/she is presented with the following login screen:-



A screenshot of the administrator login screen. At the top, it says "Sterling Products Inc" and "ADMINISTRATION". Below this is a text input field labeled "Input your Password" containing a single character. Below the input field is a "SUBMIT" button. At the bottom, there is a link that says "Forgot / Change password ?".

Figure 3

Upon inputting the password, and clicking SUBMIT, he/she is presented with the **Admin Menu**:-

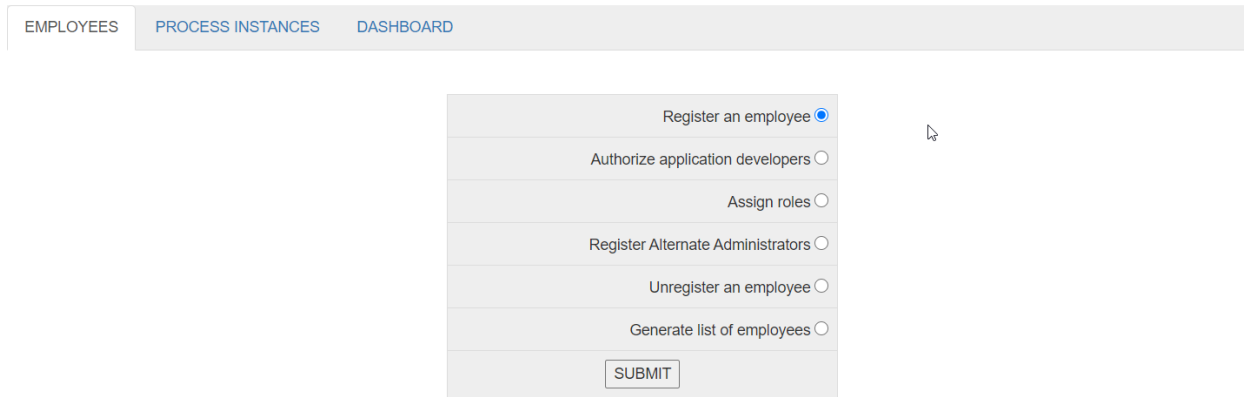


Figure 4

Notice the 3 tabs of the menu, viz., EMPLOYEES, PROCESS INSTANCES, and DASHBOARD.

2 EMPLOYEES TAB

Refer Figure 4. By selecting **Register an employee**, the Administrator can register one or more employees of his/her organization. Any registered employee can click **EMPLOYEES** in the Main Menu (Figure 2), and

1. Access ELECTRONIC OFFICE, which enables him/her to create, access and move Electronic Office files, which are the electronic equivalent of conventional paper files
2. If authorized by the Administrator, access one or more of the following 3 **applications**, viz.,
 - i. Information Management System
 - ii. Entity Accounting System
 - iii. Inventory Management System

By selecting **Authorize application developers**, the Administrator can authorize one or more of the registered employees to function as application developers, and develop custom applications and business processes. Only an authorized application developer can click **DEVELOPERS** in the Main Menu (Figure 2) and access the Developer Menu.

By selecting **Assign roles**, the Administrator can assign one or more **roles** to a registered employee. A role is a string of alphanumeric characters, e.g., "Sales Manager", "Storekeeper", etc. While a role usually indicates the actual role played by the employee in the organization, there are a few roles which authorize the employee to access the 3 applications listed above:-

Role	Authorized application
InfoManSys	Information Management System
EntityAccSys	Entity Accounting System
InvManSys	Inventory Management System

Two other roles need to be mentioned:-

Role	Purpose
ServicesPortalSupportStaff	The corresponding employee is authorized to function as a Support Staff for the SERVICES PORTAL service, which is accessible by all entities by clicking SERVICES in the Main Menu (Figure 2)
BroadcastServiceAdministrator	The corresponding employee is authorized to function as an Administrator of the BROADCAST SERVICE , which is accessible by all entities by clicking SERVICES in the Main Menu (Figure 2)

In *Essential Cloud ERP*, the following 8 entity types are supported:-

- 1) Employee
- 2) Customer
- 3) Vendor
- 4) Member
- 5) Faculty
- 6) Student
- 7) Doctor
- 8) Patient

An entity belonging to any one of these 8 entity types can click **SERVICES** in the Main Menu (Figure 2), and access the following services:-

Service	When accessible
Services Portal	When the role, ServicesPortalSupportStaff, has been assigned to at least one employee
Broadcast Service	When the role, BroadcastServiceAdministrator, has been assigned to at least one employee
Buy Products	When the role, InvManSys, has been assigned to at least one employee, as well as at least one of the organization's products has been put up for sale
Buy Services	When the role, InvManSys, has been assigned to at least one employee, as well as at least one of the organization's services has been put up for sale
Make Payment	When the organization's currency has been set to INR, as well as <i>Enterprise Flow</i> has been authorized to collect on behalf of the organization
View Statement	Always
Know your password	Always
Change your password	Always

3 PROCESS INSTANCES TAB

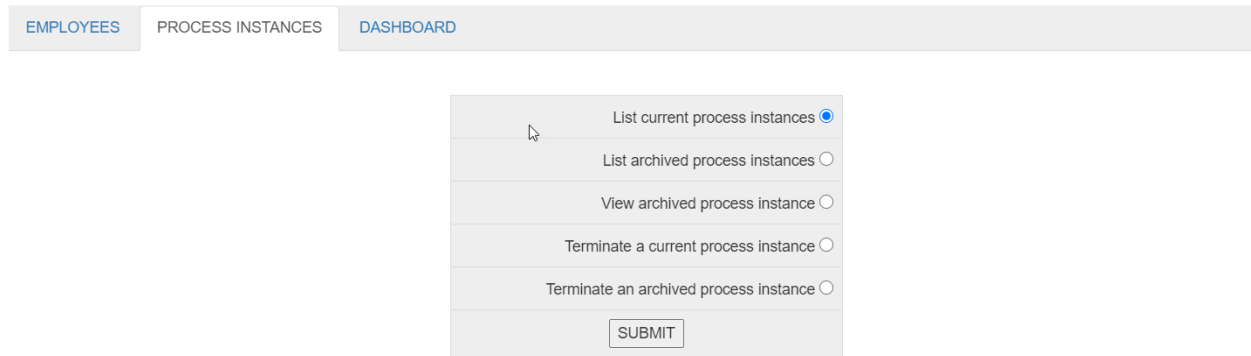


Figure 5

Under this tab, the Administrator can list, as well as terminate, both current and archived process instances, but can view only archived process instances.

4 DASHBOARD TAB

The screenshot shows a navigation bar with three tabs: 'EMPLOYEES', 'PROCESS INSTANCES', and 'DASHBOARD'. The 'DASHBOARD' tab is active. Below the navigation bar, there is a table with the following data:

	Current	Maximum possible in Lite Edition
No. of objects	5	1000
No. of document attachments	0	1000
No. of emails sent in a calendar month	8	5000

Figure 6

This tab is self-explanatory.