# END USER GUIDE:

# WEB PORTAL NAVIGATION FOR NEA USERS

NATIONAL ELECTRIFICATION ADMINISTRATION
NEA Web Portal

INDRA Philippines, Inc.

July 2017

# REVISION HISTORY

| Version | Date | Description of Changes | Prepared By | Reviewed By |
|---|---|---|---|---|
| 0.1 | 07-2017 | Initial Draft | Elaine G. Talosig | |
| | | | | |
| | | | | |
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# 1 INTRODUCTION

## 1.1 NEA Web Portal

The NEA Web Portal supports and manages the collection and validation of data between the Electronic Cooperatives (ECs) and National Electrification Administration (NEA) through the upload of EC data using standardized templates. It is on the web for accessibility of the ECs regardless of location. The portal also facilitates the download of standardized templates, the validation/approval of submitted data, the management of master data, monitoring of submission statistics and interfacing with other web links. Reports can also be downloaded from the portal.

This end user guide will assist the user to become familiar with the NEA Web Portal functionalities. Specifically, it provides NEA Users the steps on how to navigate the portal to properly execute the roles assigned to them namely DET Validator, Master Data Manager and Data Provider.

This document shall first discuss the System Requirements, NEA Web Portal User Interface and User Account Management. These are common in all roles and shall be covered in Section 2 System Guide.

The navigation guide per role will be discussed in the succeeding sections in the following order:

- Section 3 Web Portal Navigation for DET Validators
- Section 4 Web Portal Navigation for Master Data Managers
- Section 5 Web Portal Navigation for Data Providers


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## 1.2 Abbreviations

| Abbreviation | Description |
|---|---|
| DET | Data Entry Template |
| EC | Electronic Cooperative |
| NEA | National Electrification Administration |
| SSRS | SQL Server Reporting Services |


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# SYSTEM GUIDE

NEA Web Portal

INDRA Philippines, Inc.

July 2017


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# 2 SYSTEM GUIDE

This section provides the information you need to begin with NEA Web Portal.

## 2.1 System Requirements

### 2.1.1 Access to NEA Web Portal

NEA Web Portal is a web-based facility with a need to use a standard internet browser.

The NEA Web Portal URL is http://neawebappqa01.southeastasia.cloudapp.azure.com/login#ne

Usernames and passwords will be provided via email by the System Administrator. User login and password management is discussed under the User Account Management section.

Note: Ensure that you are connected to the internet.

Note: You need a *Username and Password* to access the system.

### 2.1.2 Software

Below are the necessary software needed in your computer to be able to use the system:

- Browser (Recommended: Chrome)
- Microsoft Excel 2003 - 2010
- Adobe Reader X


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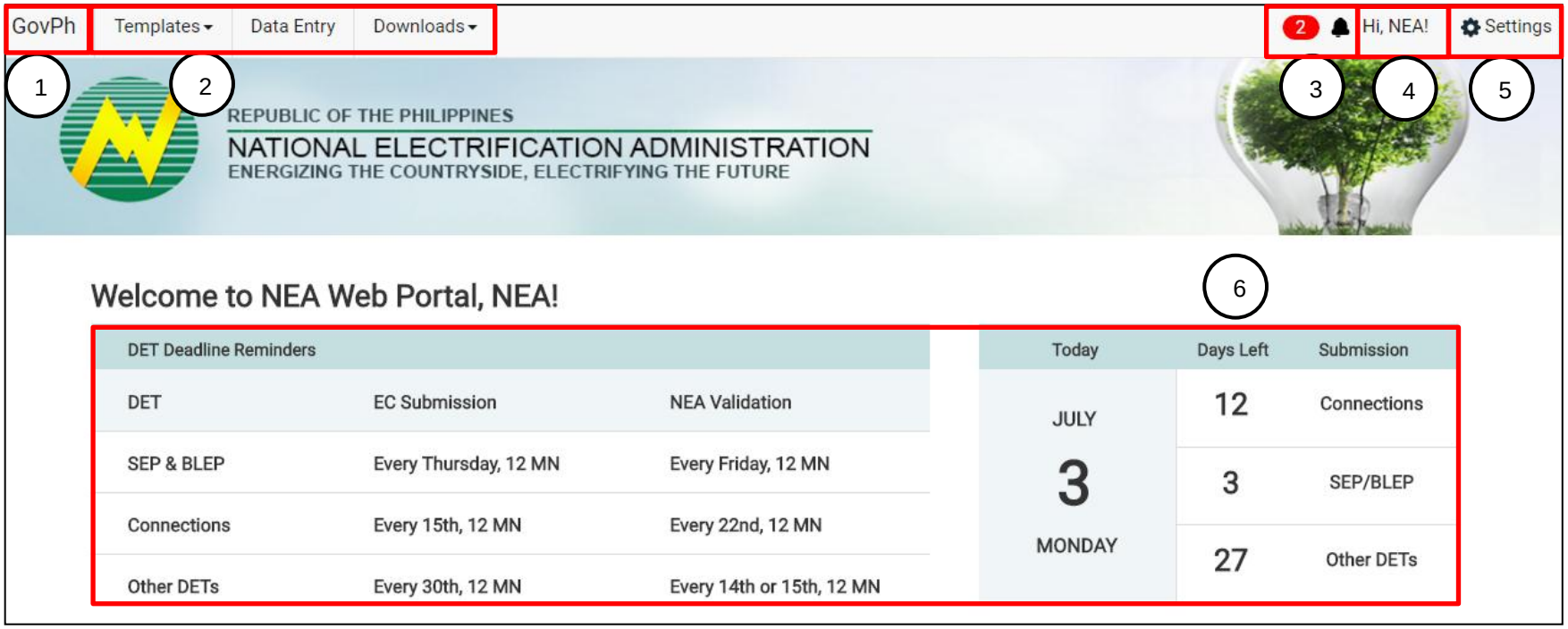
## 2.2 NEA Web Portal User Interface

Below is how the NEA Web Portal Home page looks like. This section introduces the different objects seen in the Home Page and other objects commonly used in the different screens that will aid the user in the navigation.





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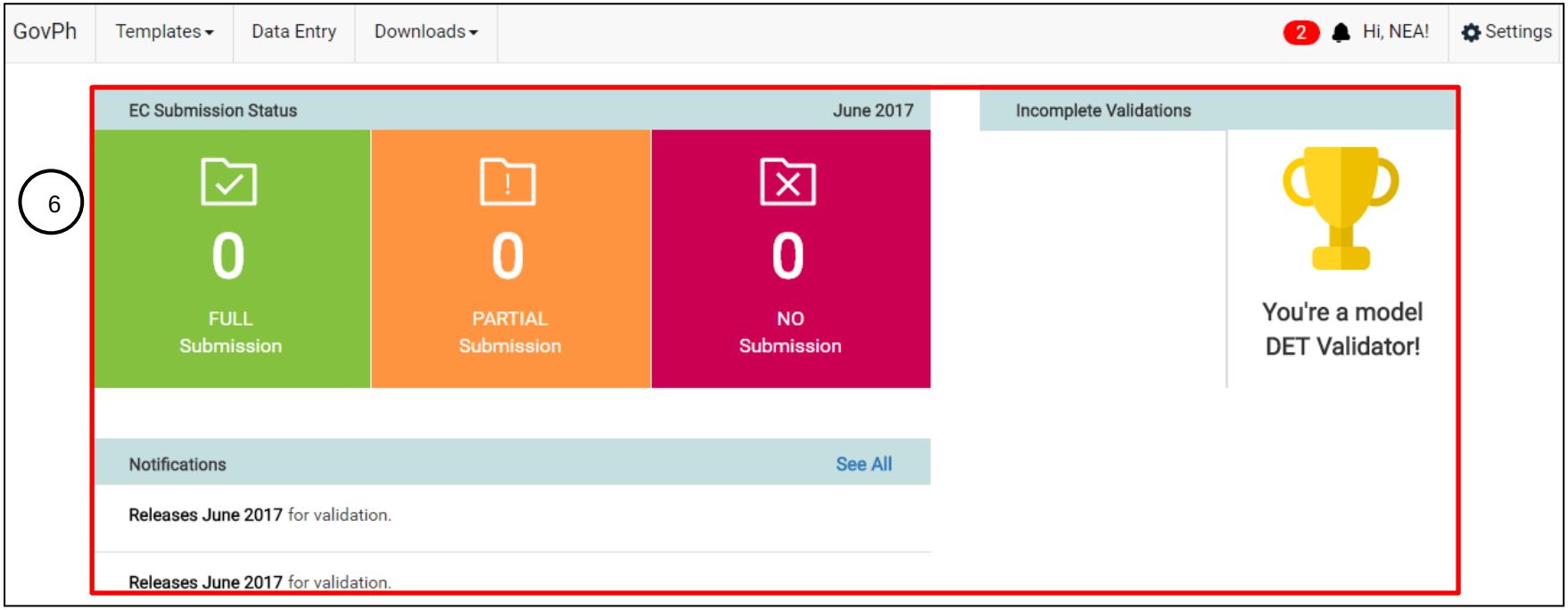


Note: Access to NEA Web Portal functionalities will depend on the user's role assignment. Some of the features in mav not be visible to vou because of this.


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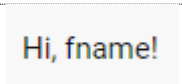
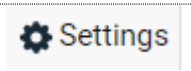
| Object Name | | Description |
|---|---|---|
| **GovPh** tab | 1 | It redirects the user to the NEA Website |
| **Menu** tab | 2 | It shows all submenus/functionalities available to the user. |
| **Notification** Icon | | It shows all alerts and notifications sent by the NEA Web Portal to the user. It also shows a list of tasks to be executed by the user. |
| **Username** link |   | It is a link to the Home Page. |
| **Settings** tab |   | It is used for user profile update and log-out |
| **Reminders and Notifications** | 6 | A section used to display reminders and notifications for the user. |
| Button | | It is an object normally seen as icon or text which does a desired function in the system when clicked. |
| Hyperlink | Change Status | A text that is usually changes format when the pointer is being hovered over, and re-directs to another page or displays section when clicked. |
| Dropdown List | | A tool that displays items or options which can be selected by scrolling the pointer over the list and clicking the desired item. |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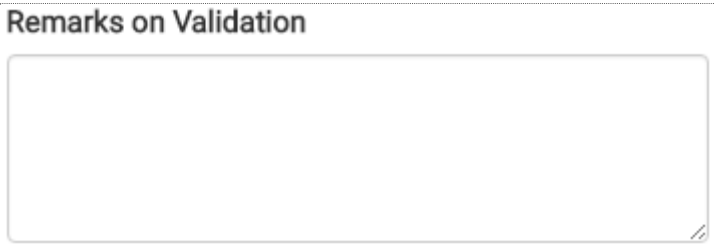
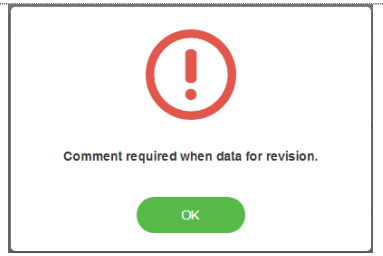
| | | |
|---|---|---|
| Field |  | It is the space where information is filled in. Each field is differentiated by field names. |
| System Prompt |  | A message or symbol used to represent system's readiness to perform the next command. |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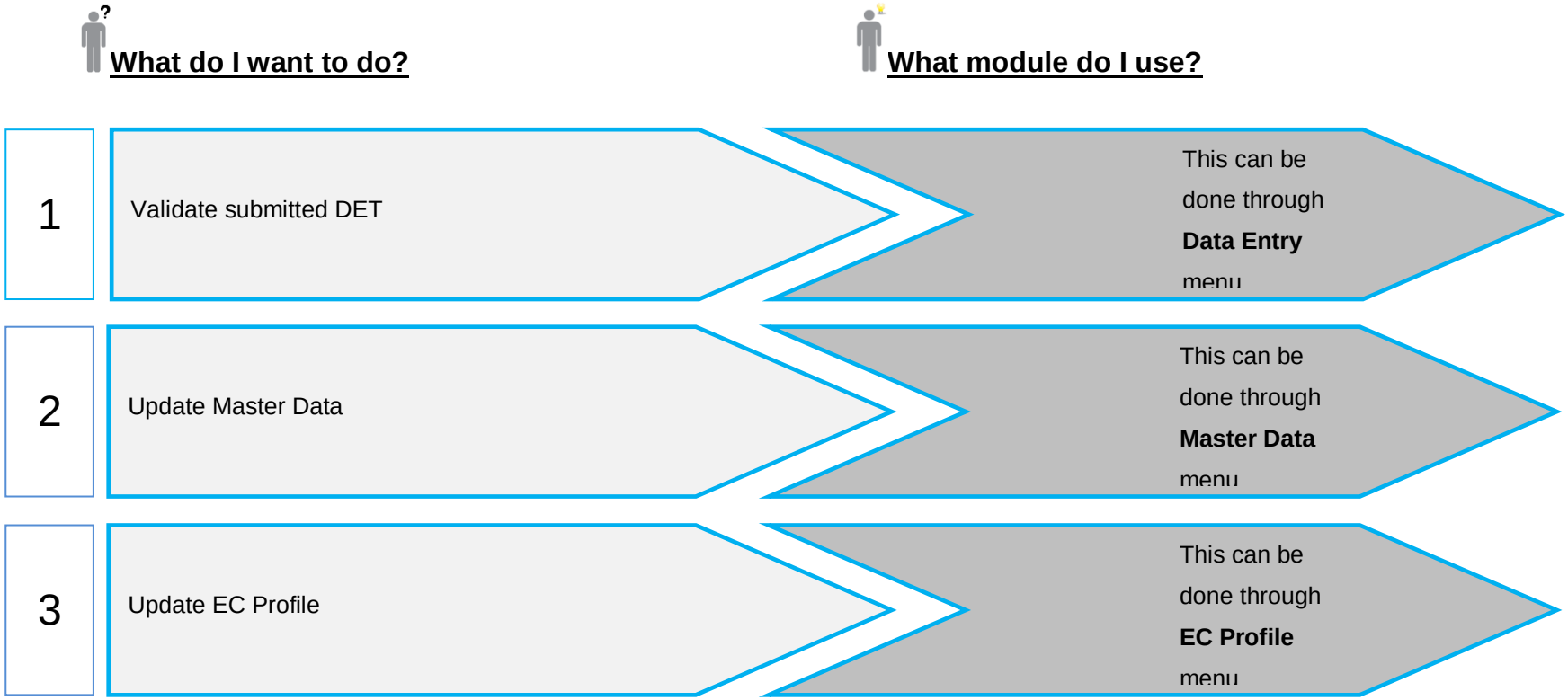
## 2.3 Navigation Guide





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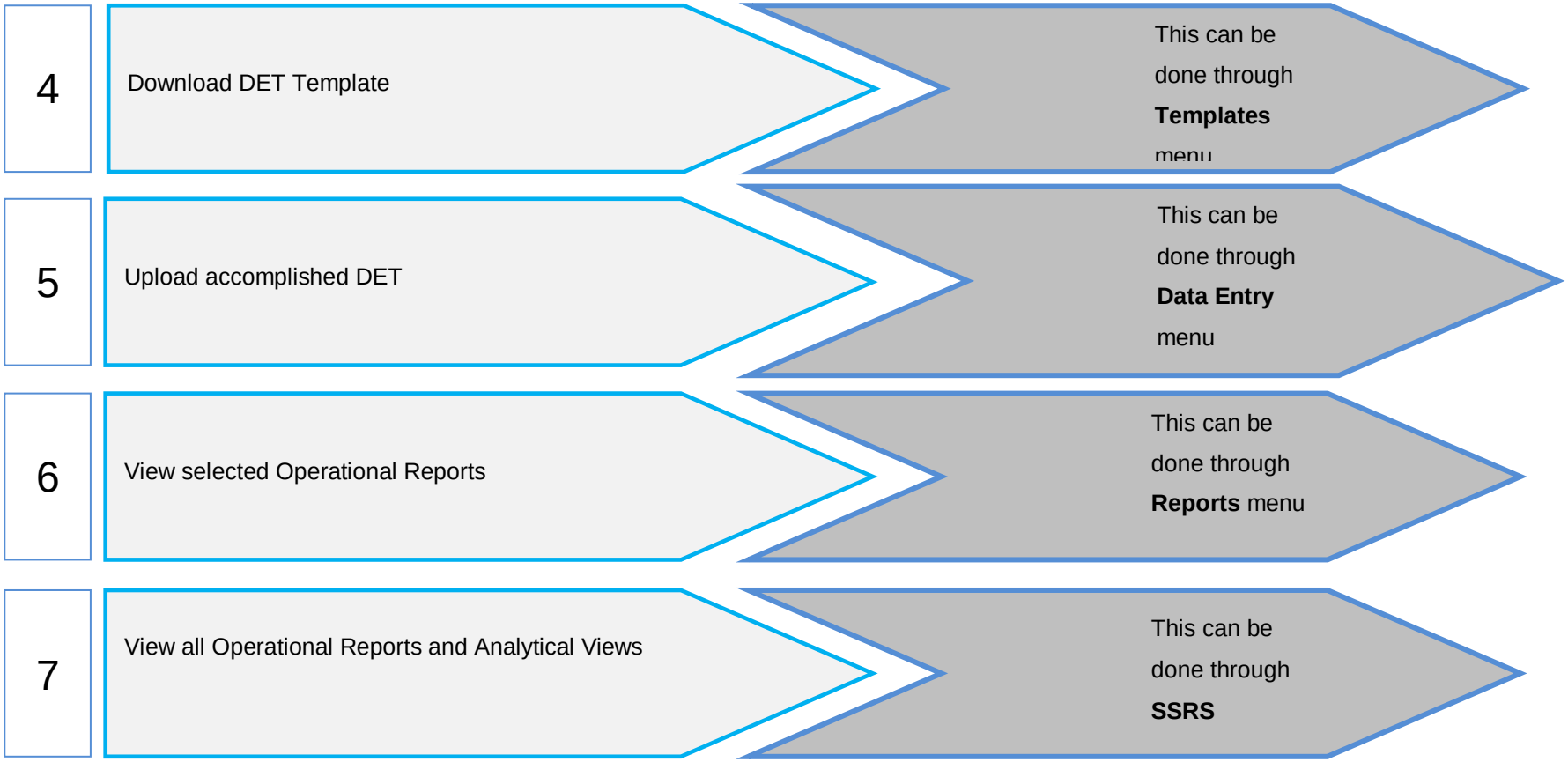



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## 2.4 User Account Management

### 2.4.1 Logging In

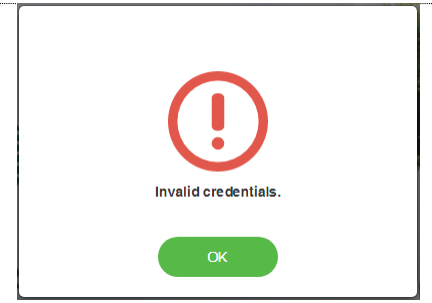
Each user will be given a unique *Username* and a *Password* that will be used to log into the system. Each *Username* will have different access to the functionalities of the *NEA Web Portal*.

Follow the steps given below to login to *NEA Web Portal*:

1. Type-in a valid *Username* and *Password.*
2. Then, click on the *Login* button or press the *ENTER* key on the keyboard.

If the *Username* or *Password* is incorrect, an error message will appear on the screen.

Note: *Username* and *Password* are case sensitive.





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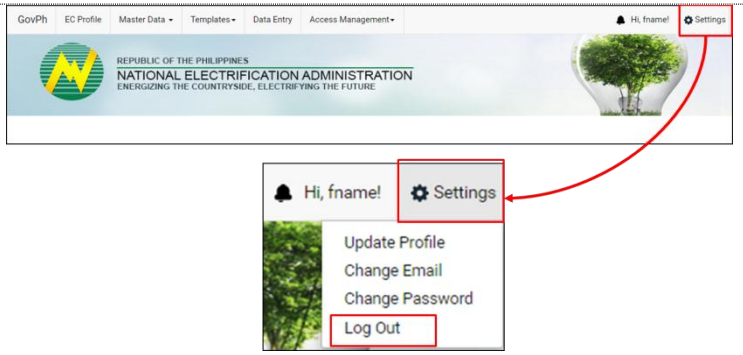
### 2.4.2 Logging Out

| | |
|---|---|
| This sub-section illustrates how to log out of the system:<br><br>*1.* Click the *Settings* > *Logout* on the upper right-side of the screen**.** |  |
| 2. A message will appear confirming the action of logging out which will then divert to the Login screen.<br><br>3. To continue logging out, click on the *YES* button. Otherwise, click on *NO* button to go back to the Home page. | |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### 2.4.3 Updating your Password

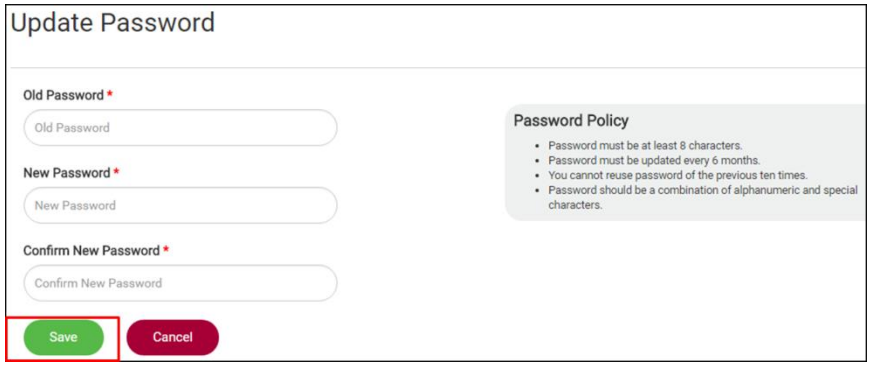
This section will demonstrate how to update a password:

1. On the upper right-side of the screen, click on *Settings* > *Update Password*. This will show the screen wherein changes to the user account passwords can be made.

2. *Update Password* screen will be displayed upon clicking *Update Password*.

3. Type in the current password in the *Old Password* box.

4. Type in the new password on the *New Password* box.




Password Policy:

- *Password is case sensitive.*
- *Password must be at least 8 characters.*
- *Password must be updated every 6 months.*
- *You cannot reuse password of the previous*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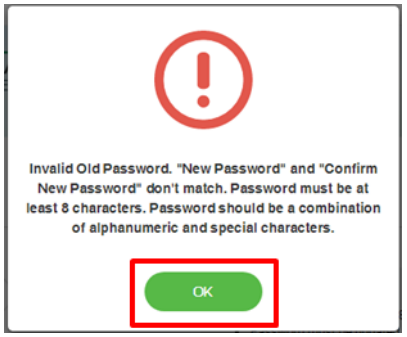
| | |
|---|---|
| *ten times.*<br>*Password should be a combination of alphanumeric and special characters.*<br><br>5. Re-type the new password in the *Confirm New Password* box.<br><br>6. After filling out the mandatory fields, click *Save* button. | |
| ✎ An error message will appear if the following errors are encountered:<br>○ Old Password is incorrect<br>○ "New Password" and "Confirm New Password" do not match<br>○ New password format is incorrect.<br>✎ Click *OK* button to go back to the *Update Password* screen. |  |
| 7. Click *Yes* button on the system prompt to confirm new password. | |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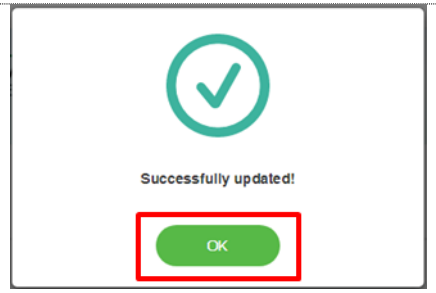
| | |
|---|---|
| 8. Click *OK* button on the system prompt. User will be re-directed to the Home page. |  |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# WEB PORTAL NAVIGATION FOR DET VALIDATORS

NEA Web Portal

INDRA Philippines, Inc.

July 2017


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# 3 WEB PORTAL NAVIGATION FOR DET VALIDATORS

The main role of the DET Validator is to validate the DETs submitted by the Electric Cooperatives (ECs). The approval or rejection is done in the NEA Web Portal.

The menu to be used by the DET Validator to execute the role is *Data Entry*.

This section will discuss the steps on how to navigate through *Data Entry*.


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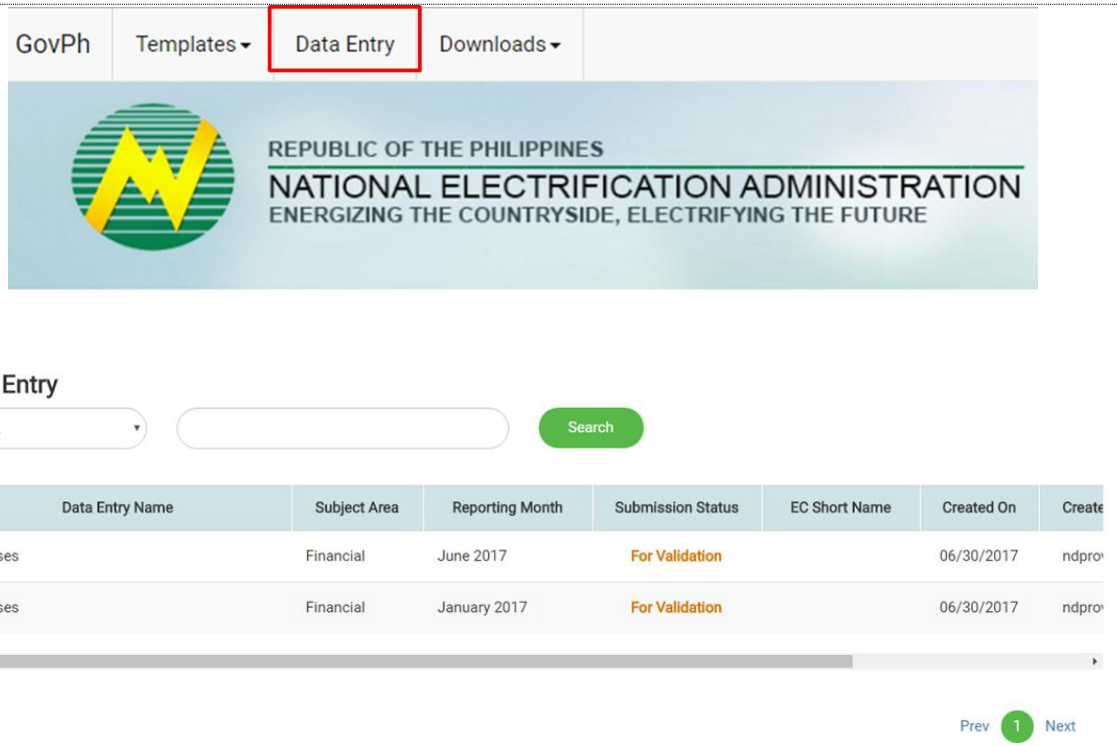
## 3.1 Data Entry Menu

1. Select **Data Entry** from the Menu tab.
2. *Data Entry list* will be displayed.





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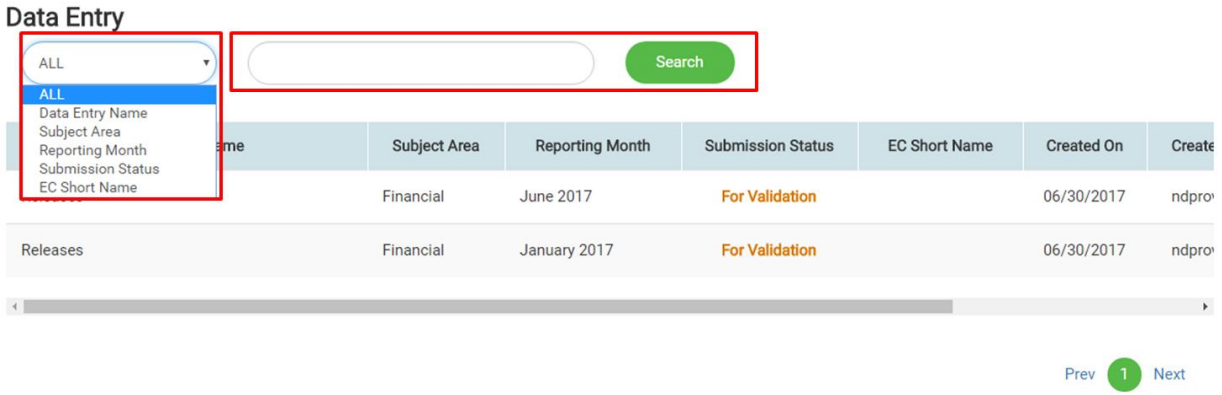
### 3.1.1 Search a Data Entry

1. From the *Data Entry* list, select Filter.
   - ALL
   - Search by Data Entry Name, Subject Area, Reporting Month, etc.
2. Enter keyword.
3. Click **Search** button.

Click **Previous** or **Next** button to view search results in other pages.





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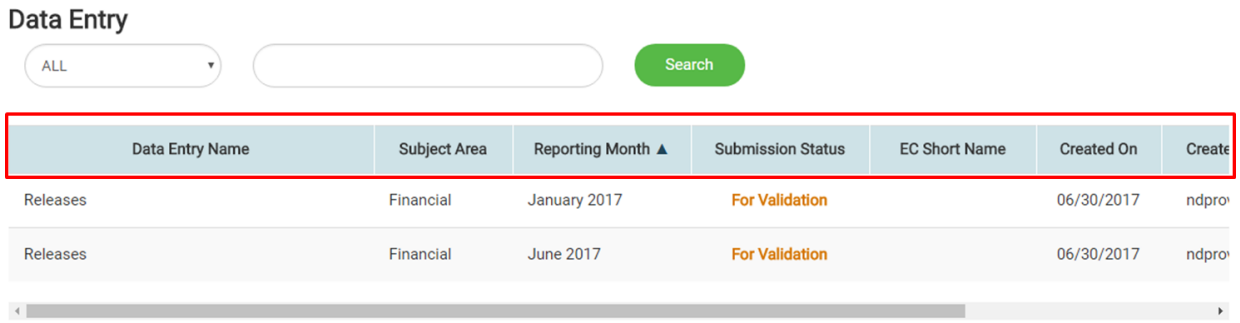
### 3.1.2 Sort Search Results

1. From the *Data Entry* list, click Column Header of the column to be sorted.
    - Data Entry Name, Subject Area, Reporting Month, etc.

Sorting rearranges the entries alphabetically A-Z or Z-A. Click to sort again in the reverse order.





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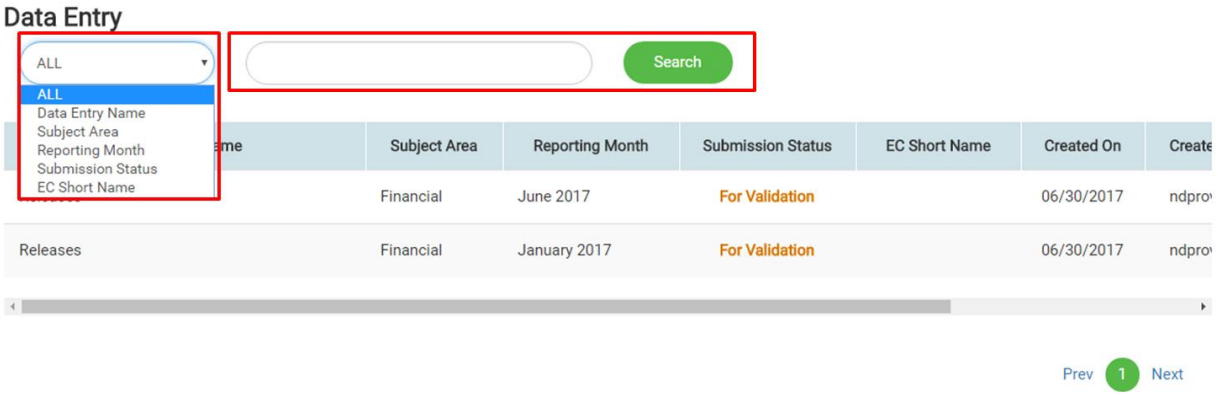
### 3.1.3 View Data Entry

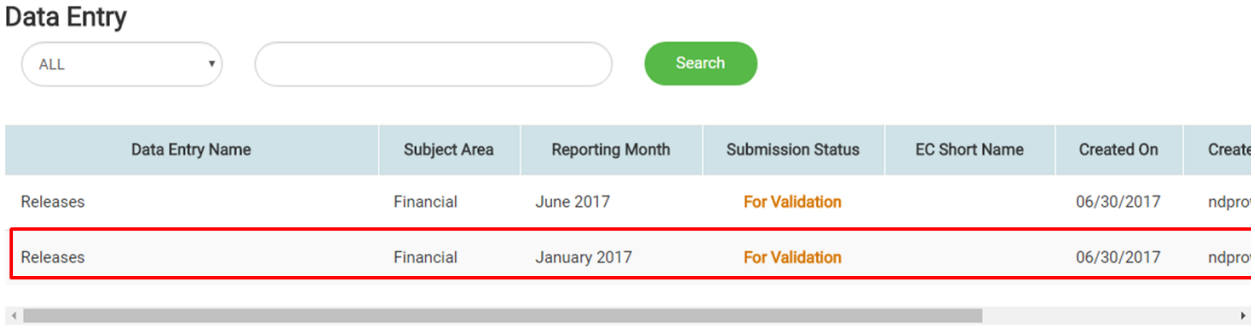
1. From the *Data Entry* list, search the DET to be validated.

   Submission Status:
   - **For Validation** – a successfully submitted DET to be validated by NEA
   - **For Revision** – DET rejected by NEA to be revised by EC
   - **Validated** – DET that passed the validation of NEA




2. Click desired DET from the Data Entry list.

   NEA Validator should select a DET with status **For Validation.**





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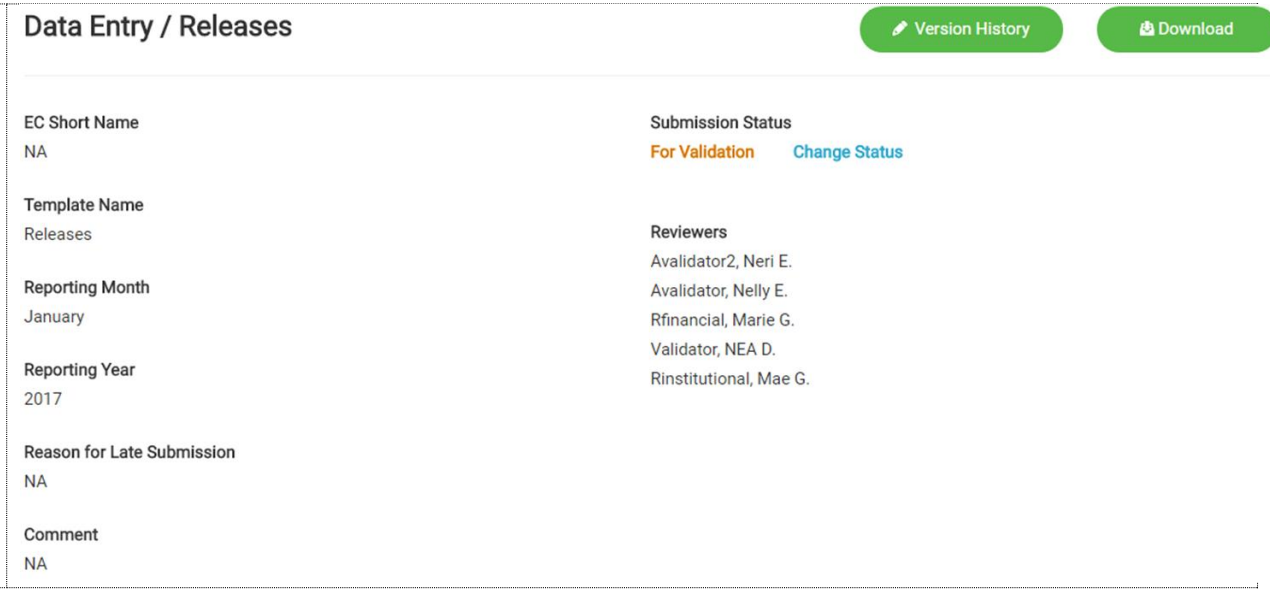
3. System will display the *Data Entry* details page.





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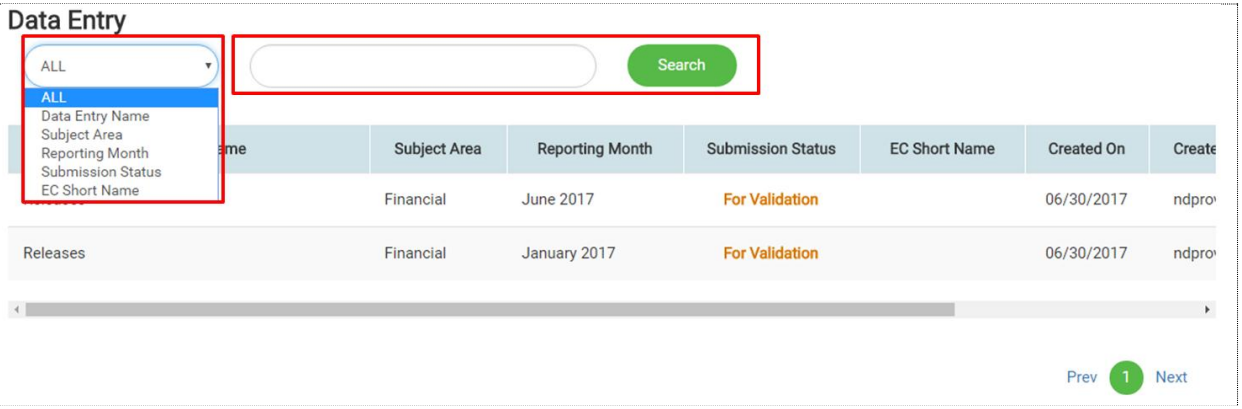
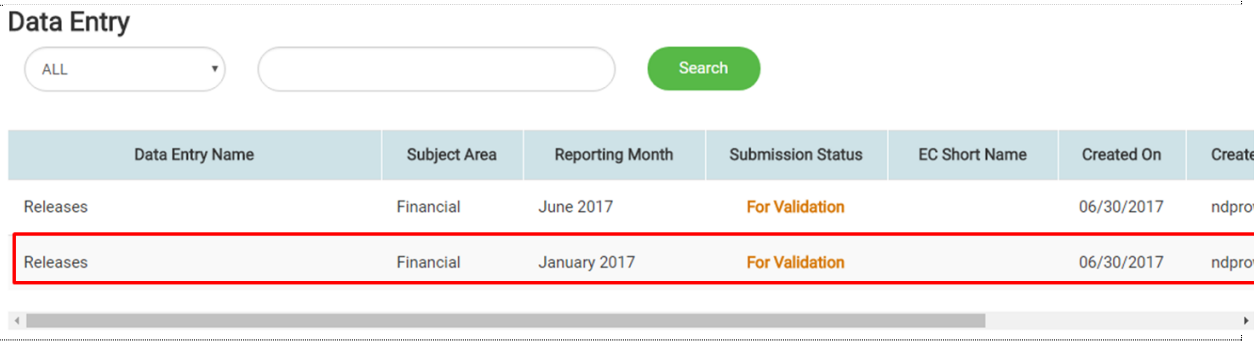
### 3.1.4 View Version History

| | |
|---|---|
| 1. From the *Data Entry* list, search the DET to be viewed. |  |
| 2. Click desired DET from the Data Entry list. |  |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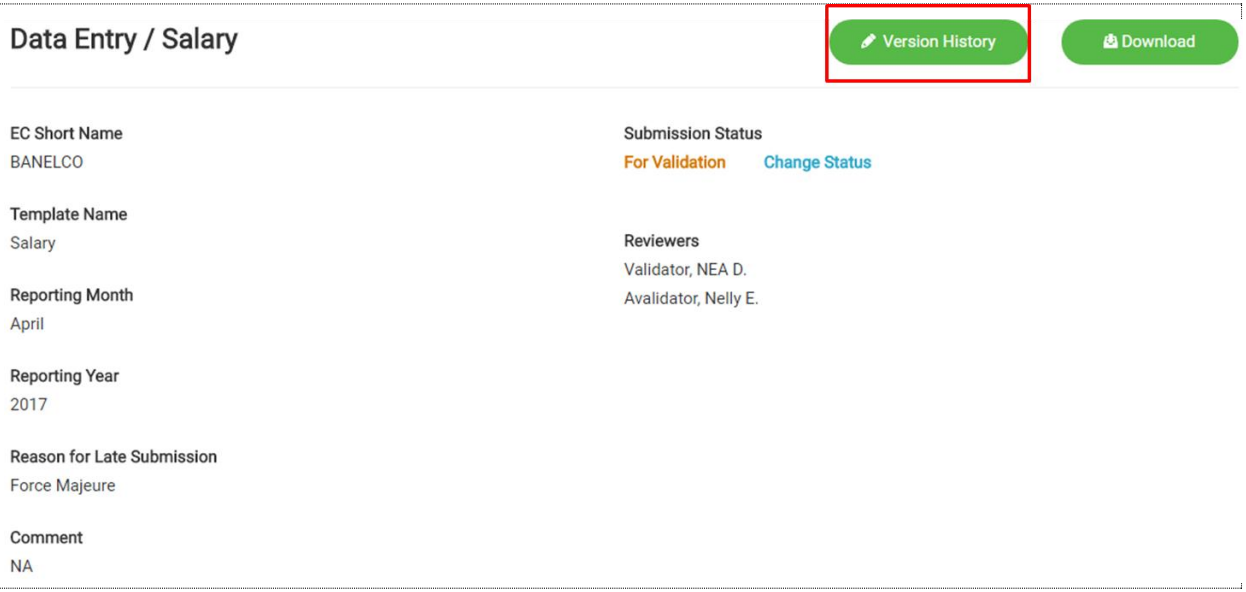
| | |
|---|---|
| 3. System will display the *Data Entry* details page.<br><br>4. From the *Data Entry* details page, click **Version History** button. |  |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5. System will display the history of submissions for the DET.

System assigns an incremented version for every submission.

Data Entry / Salary / Version History

| Data Entry Name | Version No. | Reporting Month | Submission Status | Created On | Created By | Updated On |
|---|---|---|---|---|---|---|
| 20170703072137_Salary_banelco_april2017.xls | 2.0 | April 2017 | For Validation | 07/03/2017 | eeecuser | |
| 20170703053004_Salary_banelco_april2017.xls | 1.0 | April 2017 | For Revision | 07/03/2017 | eeecuser | |

Data Entry / Salary / Version History

| Data Entry Name | Version No. | Reporting Month | Submission Status | Created On | Created By | Updated On |
|---|---|---|---|---|---|---|
| 20170703072626_Salary_banelco_may2017.xls | 2.0 | May 2017 | For Validation | 07/03/2017 | eeecuser | |
| 20170703065259_Salary_banelco_may2017.xls | 1.0 | May 2017 | Validated | 07/03/2017 | eeecuser | |


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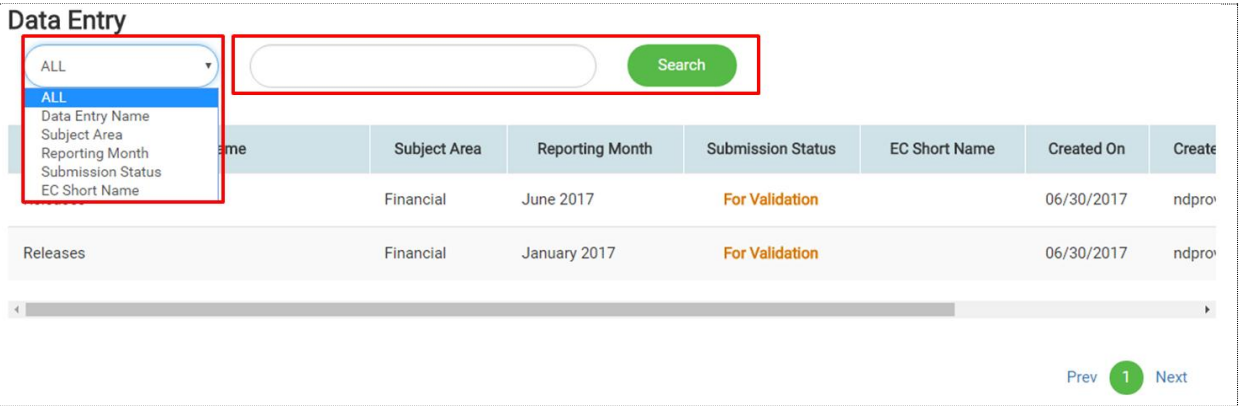
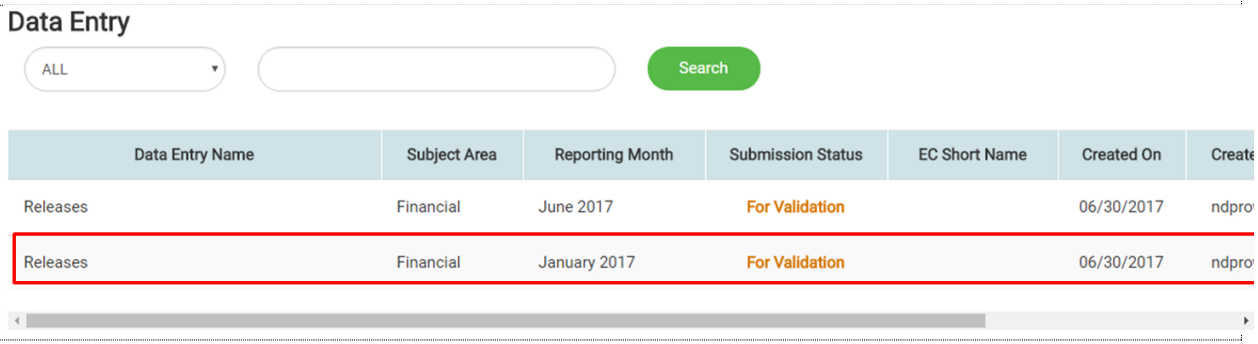
### 3.1.5 Download Data Entry

1. From the *Data Entry* list, search the DET to be downloaded.




2. Click desired DET from the Data Entry list.





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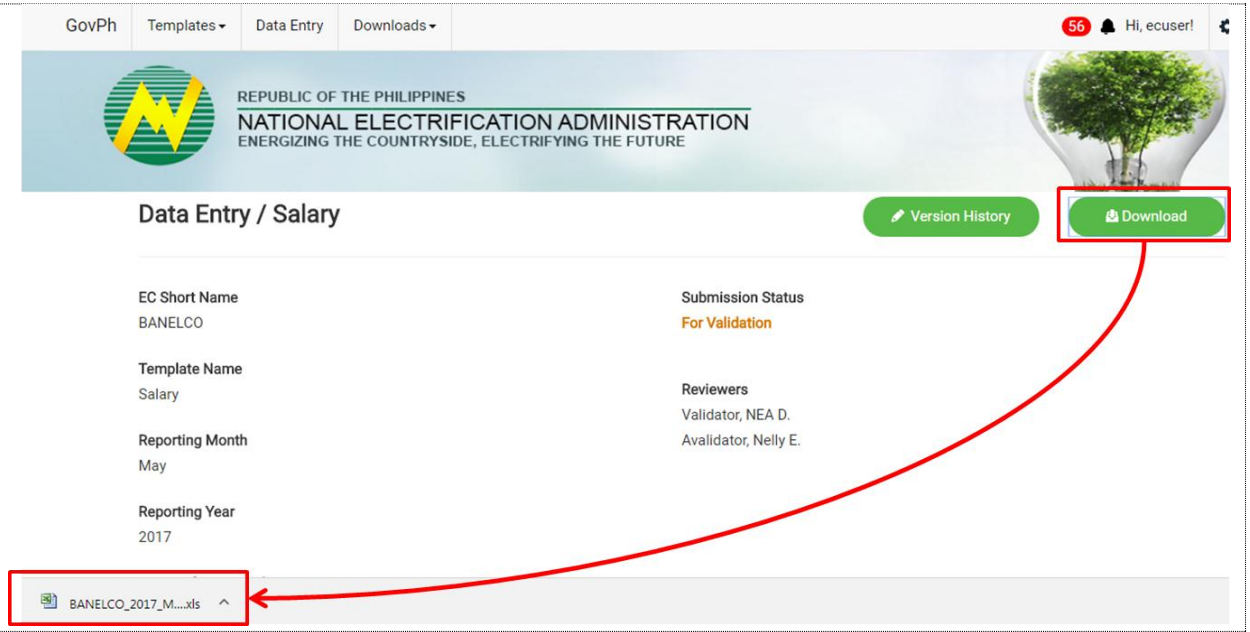
3. System will display the *Data Entry* details page.

4. From the *Data Entry* details page, click **Download** button to download the DET.

   DET file is in excel format.

5. Click the DET file to open it.





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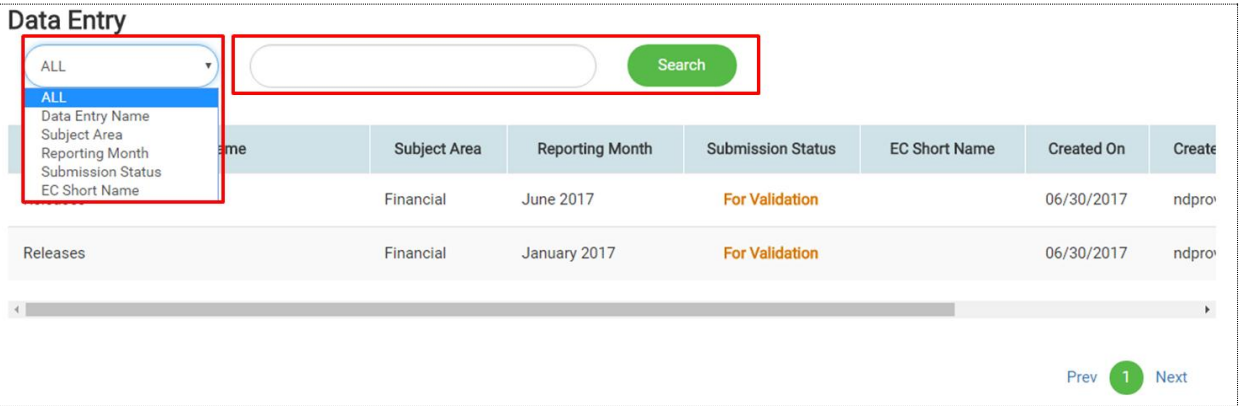
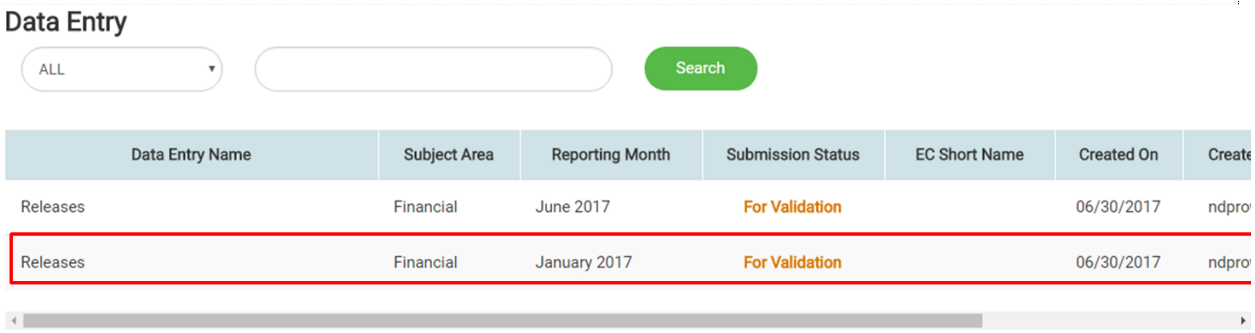
### 3.1.6 Change Status of Data Entry

1. From the *Data Entry* list, search the DET to be validated.




2. Click desired DET from the Data Entry list.





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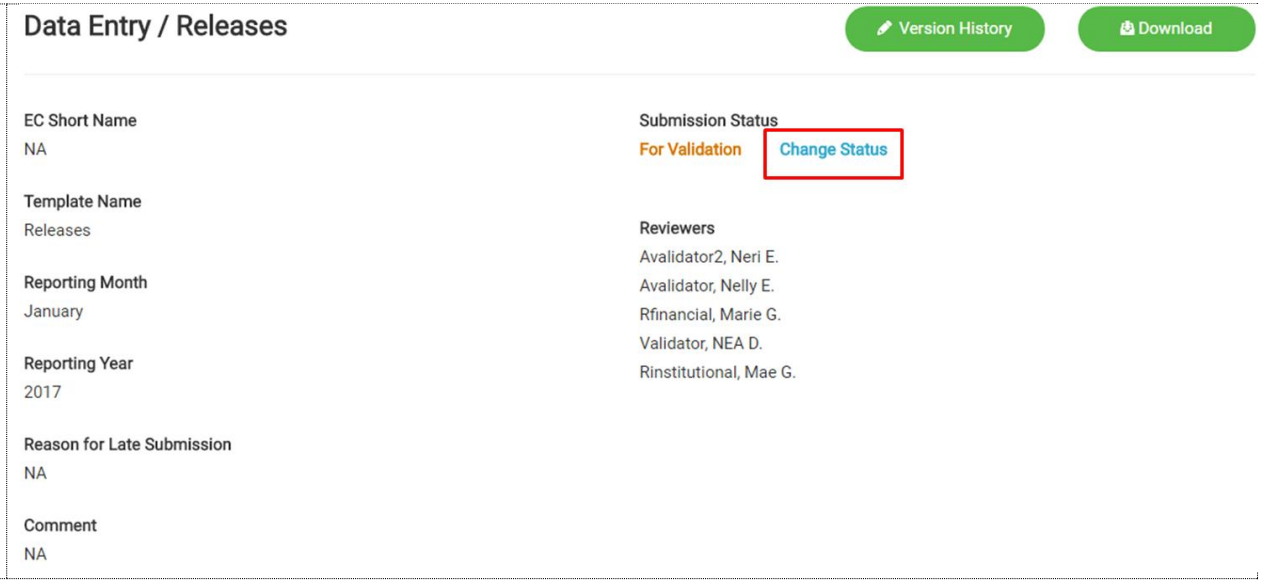
3. System will display the *Data Entry* details page.

4. From the *Data Entry* details page, click **Change Status** link





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5. Select value from the **Submission Status** field.

   List of Values (LOV):
   - For Revision
   - Validated

6. Select Value from **Feedback on Late Submission** field.

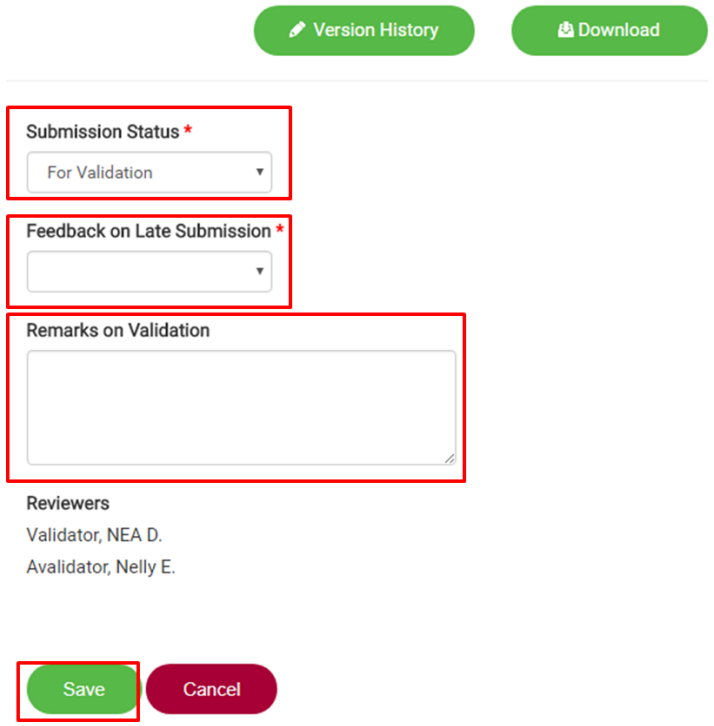
   Required if late submission

   List Of Values (LOV):
   - Valid
   - Invalid

7. Enter remarks.

   Required if Submission Status is “For Revision”.

8. Click **Save** button.





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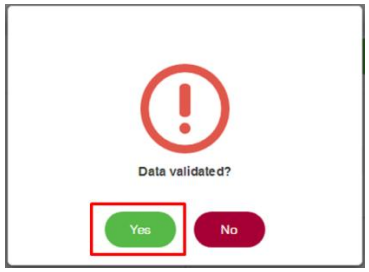
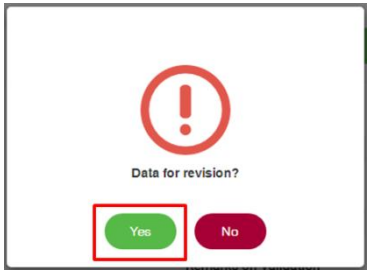
| | |
|---|---|
| **CHANGING STATUS TO VALIDATED**<br><br>9. If Status is changed to "**Validated**", system prompts message.<br><br>10. Click **Yes** button. |  |
| **CHANGING STATUS TO FOR REVISION**<br><br>9. If Status is changed to "**For Revision**", system prompts message.<br><br>10. Click **Yes** button. |  |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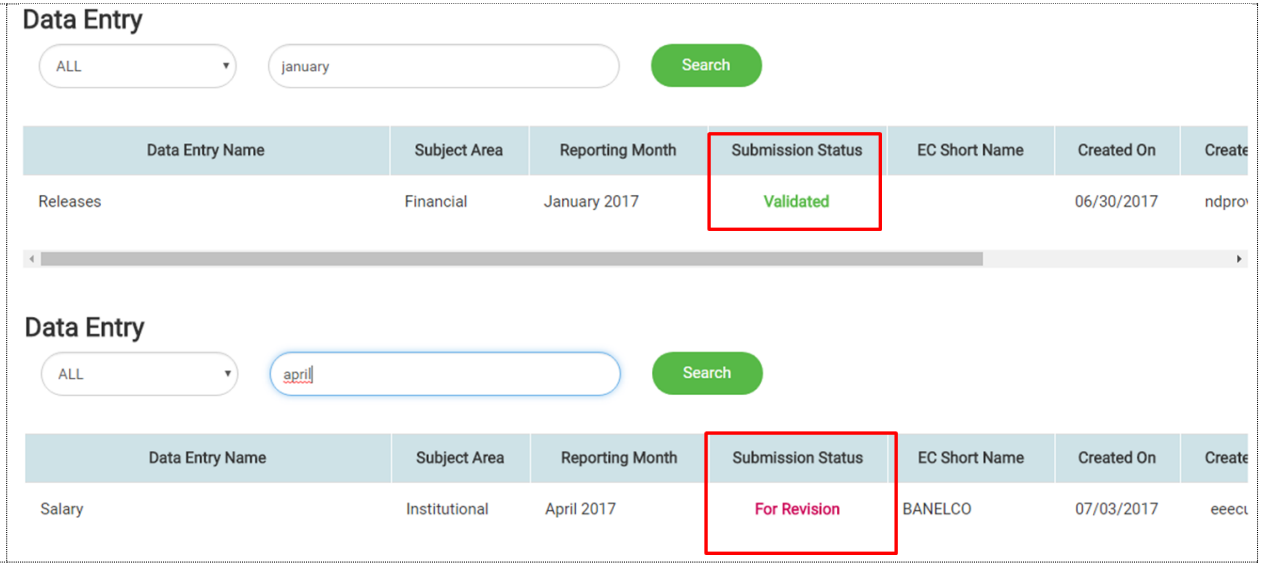
11. System will re-direct to *Data Entry* list.

*Data Entry* list will reflect the new Submission Status.




### 3.1.7 Email Notifications and Reminders

The DET Validator will receive emails for the following:

- Notification on submitted DETs pending validation
- Reminders on deadlines for DET validations (e.g., 48 hours before due date)

The email contains links that will redirect to the portal. User is required to log-in.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# WEB PORTAL NAVIGATION FOR MASTER DATA MANAGERS

NEA Web Portal

INDRA Philippines, Inc.

July 2017


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# 4 WEB PORTAL NAVIGATION FOR MASTER DATA MANAGERS

The main role of the Master Data Manager is to maintain the Master Data in the system whether it is an update to an existing master data, addition of new master data, or deactivation of existing master data.

The list of Master Data maintained in the NEA Web Portal is shown below:

- List of Values
- Geography
- BOD Profile
- Power Supplier
- Power Plant
- Substation
- Transformer

The menu to be used to maintain master data is the *Master Data*.

The Master Data Manager is also responsible for the maintenance of EC Profiles. This is done in the *EC Profile* menu.

This section will discuss the steps on how to navigate through the different submenus of *Master Data* and the *EC Profile* menu.


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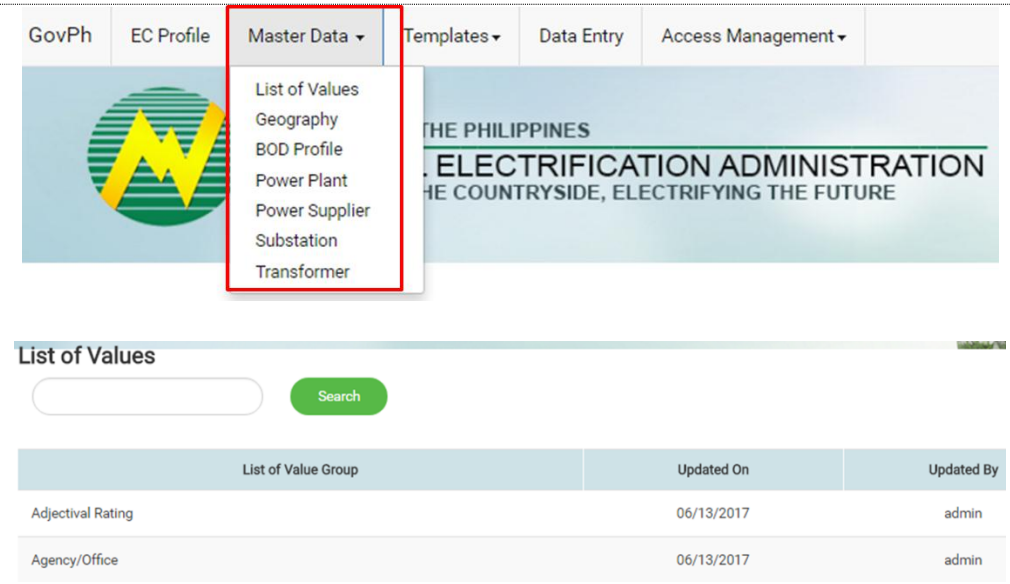
## 4.1 List of Values Submenu

1. Select **Master Data > List of Values** from the Menu tab.

2. *List of Values* list will be displayed.





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### 4.1.1 Search a List of Values (LOV) Group

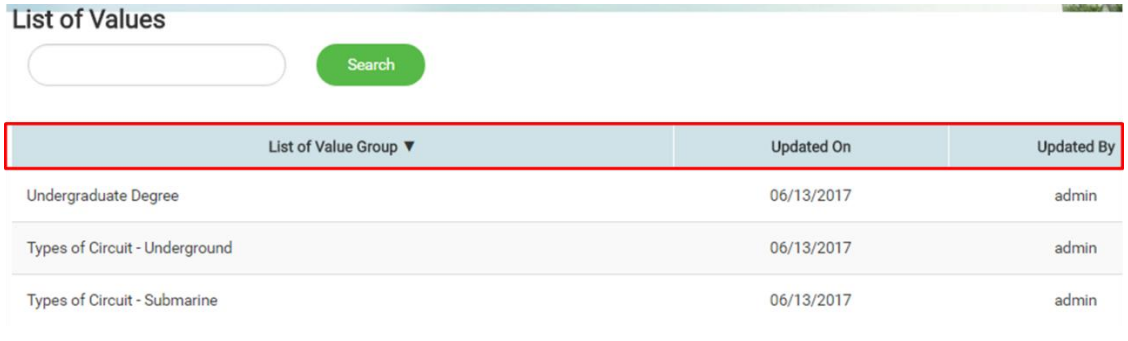
1. From the *List of Values* search screen, enter keyword.
2. Click **Search** button.

Click **Previous** or **Next** button to view search results in other pages.

### 4.1.2 Sort Search Results

1. From the *List of Values* list, click a column header to sort list.
   - List of Value Group, Updated On, Updated By

Sorting rearranges the entries alphabetically A-Z or Z-A. Click to sort again in the reverse order.





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### 4.1.3 View LOV Group

1. From the *List of Values* list, search the LOV group to be viewed.

2. Click desired LOV group.

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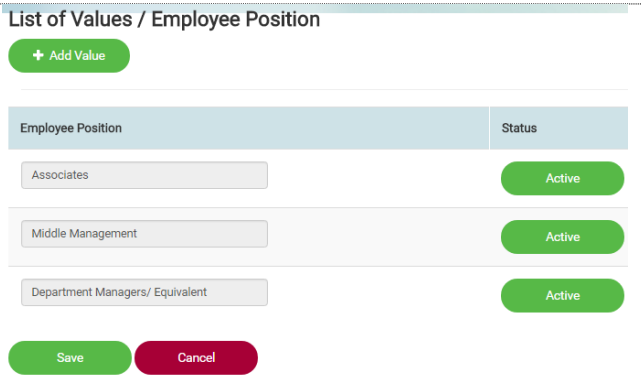
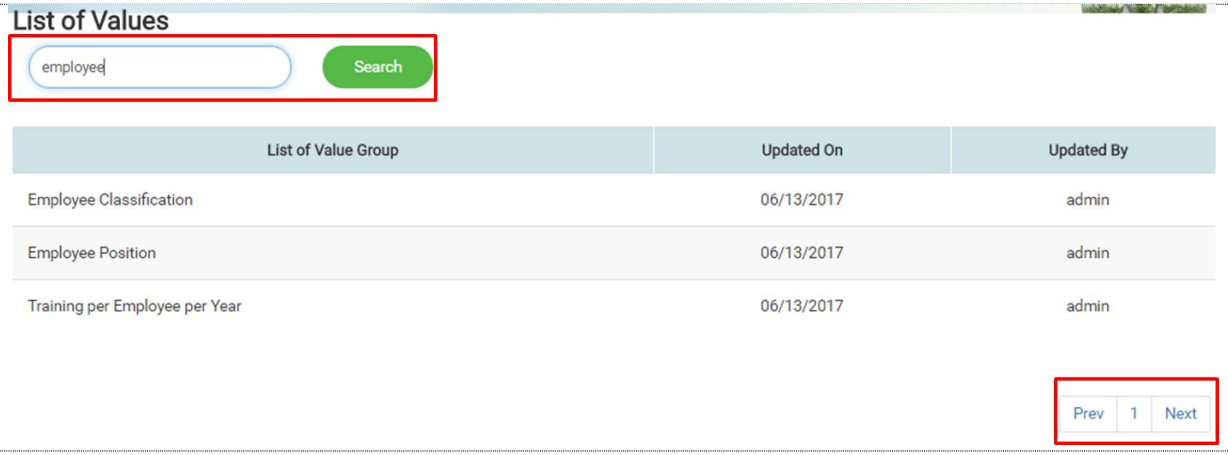
| | |
|---|---|
| 3. System will display the *LOV Group* details. |  |

### 4.1.4 Add a Value to the LOV Group

| | |
|---|---|
| 1. From the *List of Values* list, search the LOV group to be updated. |  |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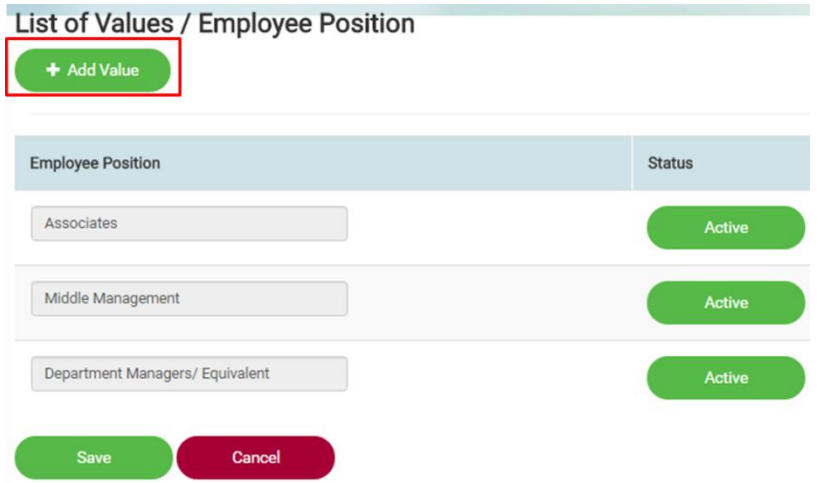
2. Click desired LOV group.

3. System will display the *LOV Group* details page.

4. Click **+ Add Value** button.

Click **+ Add Value** button again to add multiple values.





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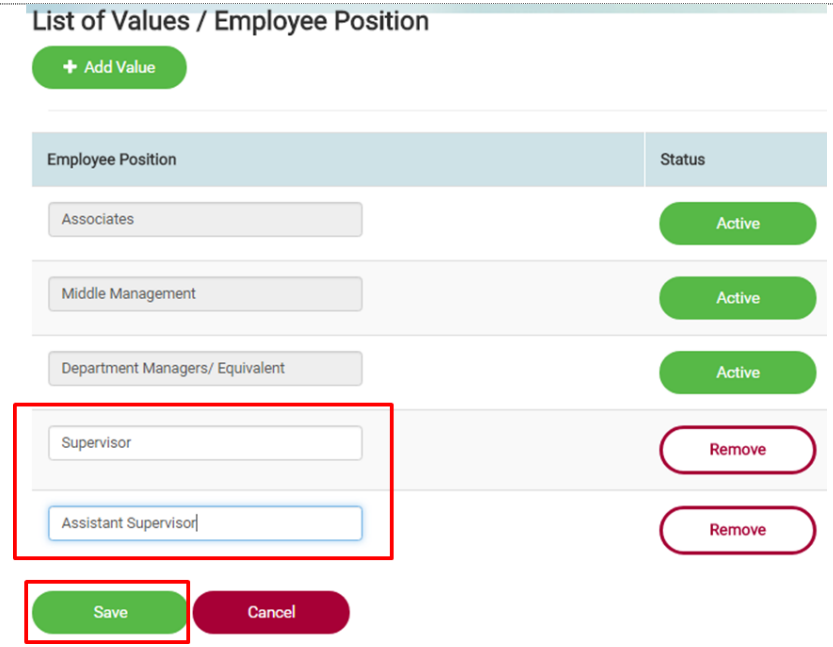
5. Enter value name/s.

To remove a newly added value, click its corresponding **Remove** button.

6. Click **Save** button.




7. System will display a prompt.

8. Click **OK** button on the prompt.

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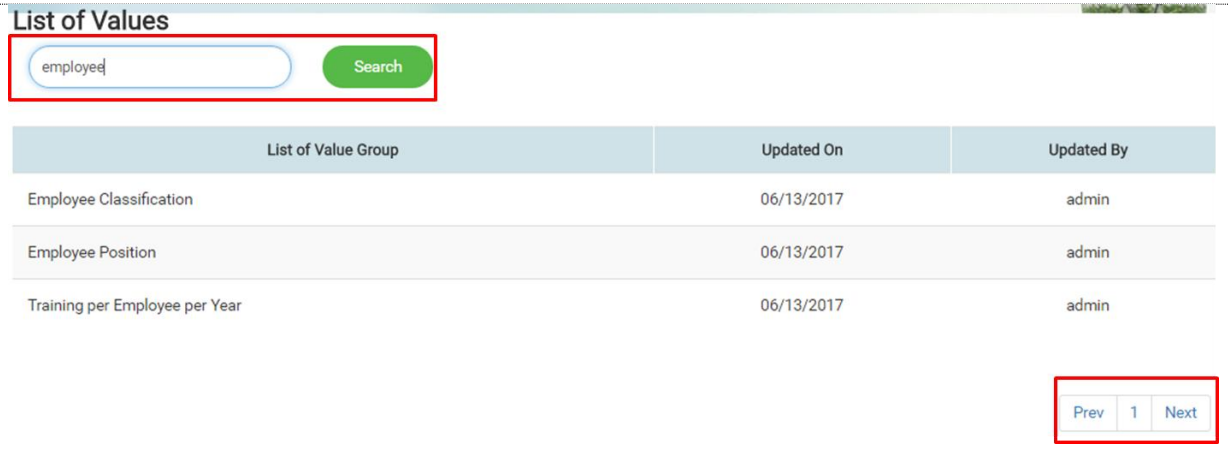
| | |
|---|---|
| 9. System will revert back to the *List of Values* list. | |



### 4.1.5 Deactivate a Value from the LOV Group

| | |
|---|---|
| 1. From the *List of Values* list, search the LOV group to be updated. |  |

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2. Click desired LOV group.

3. System will display the *LOV Group* details page.

4. Click **Active** button of the value to be deactivated.

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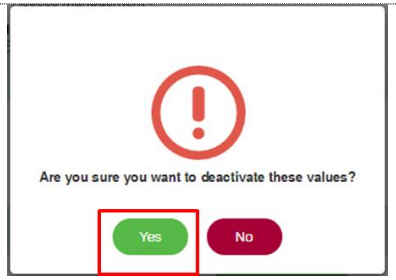
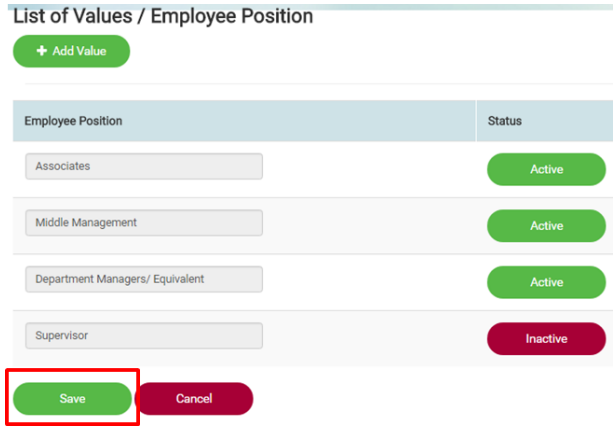
| | |
|---|---|
| 5. System will display a confirmation prompt.<br><br>6. Click **Yes** button to confirm deactivation of the value. |  |
| 7. System will go back to the *LOV Group* details page.<br><br>Status of the record changes to **Inactive**.<br><br>8. Click **Save** button to save the changes to the LOV group. |  |
| 9. System will display a prompt.<br><br>10. Click **OK** button on the prompt. | |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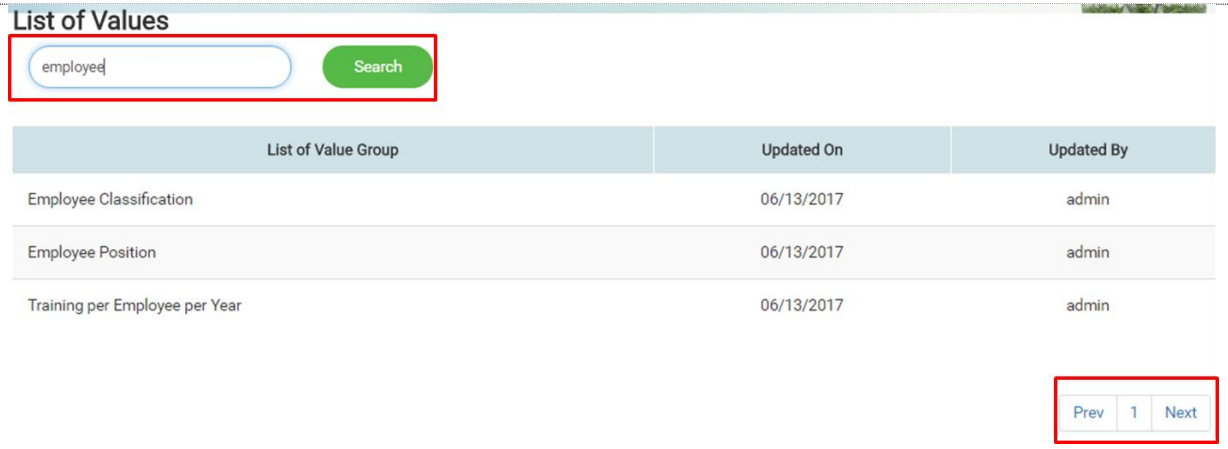
| | |
|---|---|
| 11. System will revert back to the *List of Values* list. | |



### 4.1.6 Activate a Value from the LOV Group

| | |
|---|---|
| 1. From the *List of Values* list, search the LOV group to be updated. |  |

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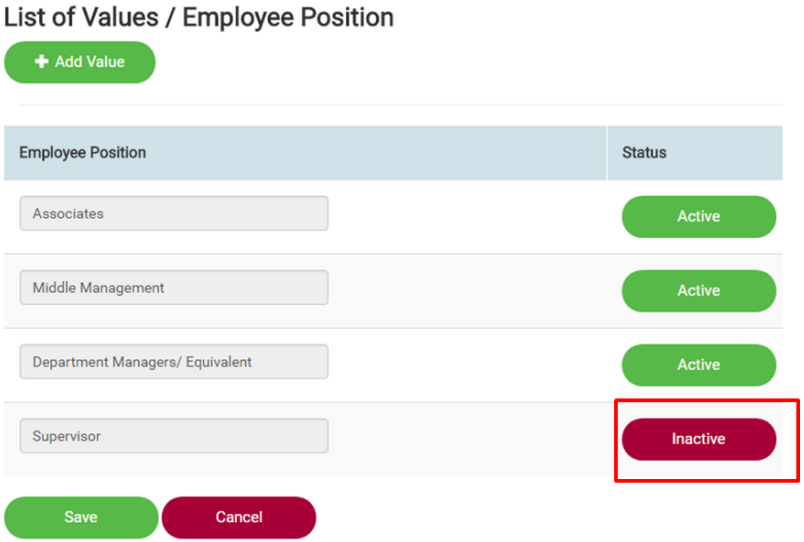
2. Click desired LOV group.

3. System will display the *LOV Group* details page.

4. Click **Inactive** button of the value to be activated.





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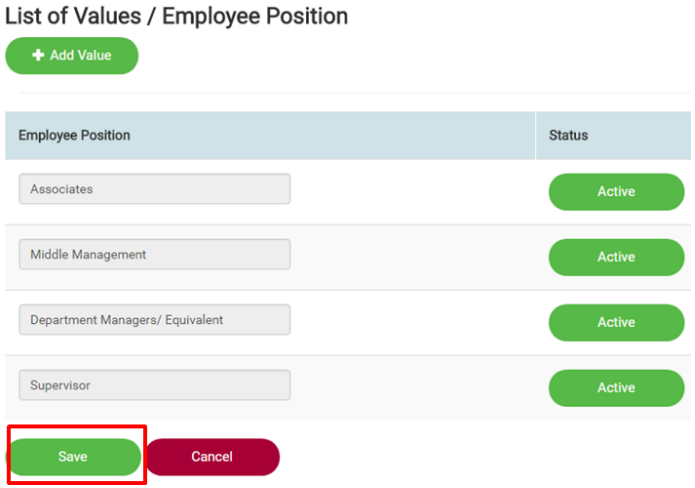
| | |
|---|---|
| Status of the record changes to **Active**.<br><br>5. Click **Save** button to save the changes to the LOV group. |  |
| 6. System will display a prompt.<br><br>7. Click **OK** button on the prompt. | |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| | |
|---|---|
| 8. System will revert back to the *List of Values* list. | |




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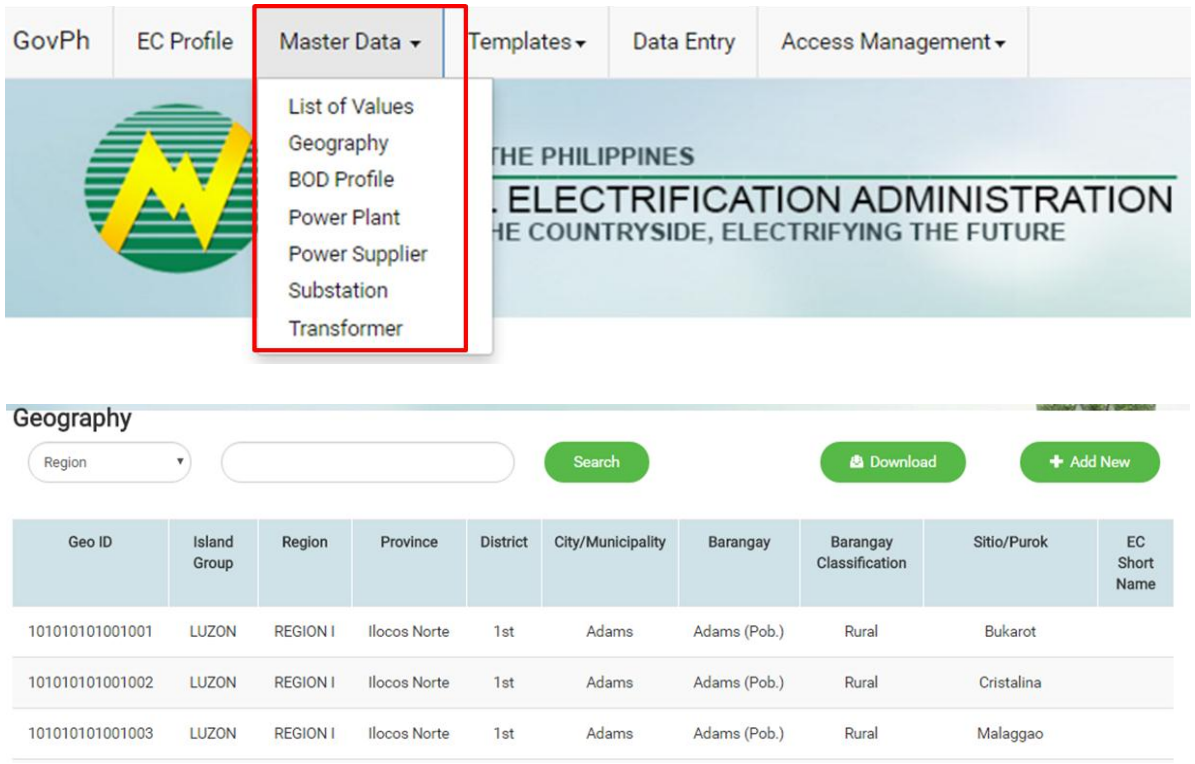
## 4.2 Geography Submenu

1. Select **Master Data > Geography** from the Menu tab.

2. *Geography* list screen will be displayed.





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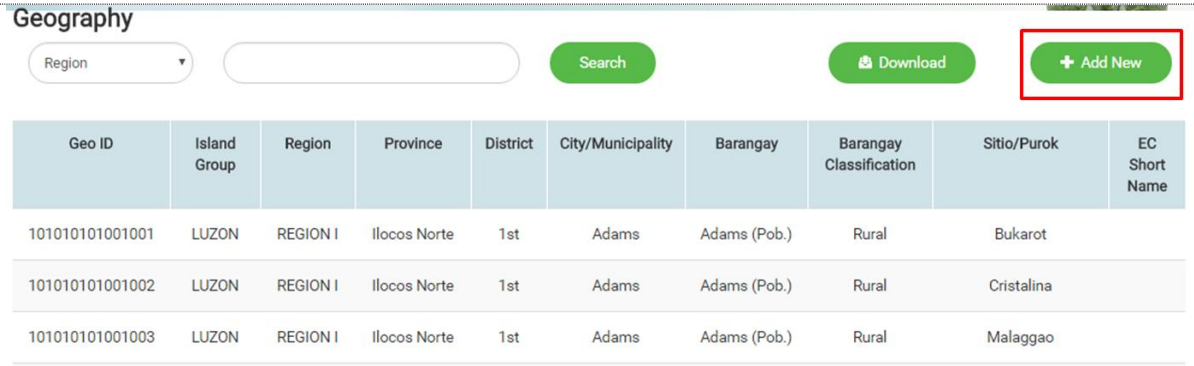
### 4.2.1 Add new Geography

1. Click **+ Add New** button in the Geography list screen.

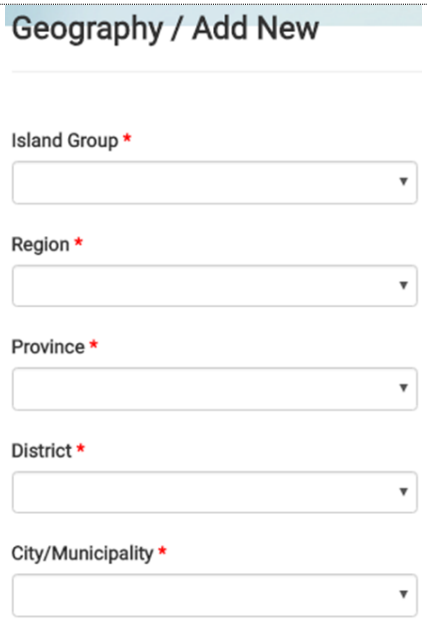



2. Fill-out the fields in the *Geography/Add New* screen.

   Fields with asterisk are required.

3. Select value from the dropdown.

   List of values for the succeeding fields will depend on the selected value in the prior field.





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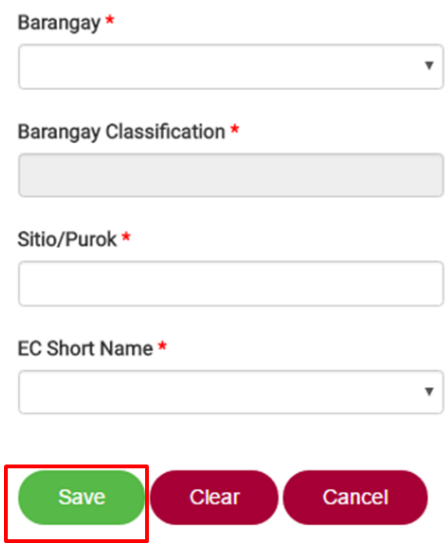
| | |
|---|---|
| **Barangay Classification** field is disabled and value will depend on the Barangay field.<br><br>4. Click **Save** button to save the new geography record. |  |
| 5. System will display a prompt.<br><br>6. Click **OK** button on the prompt. | |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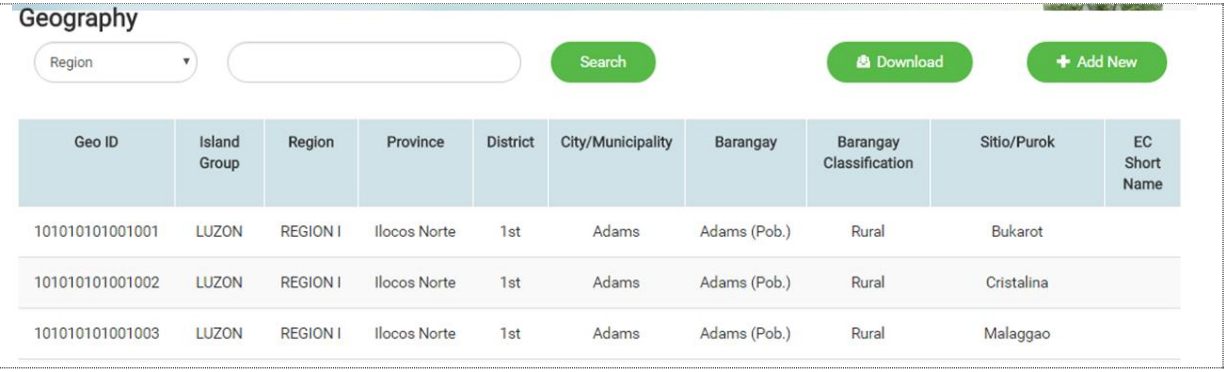
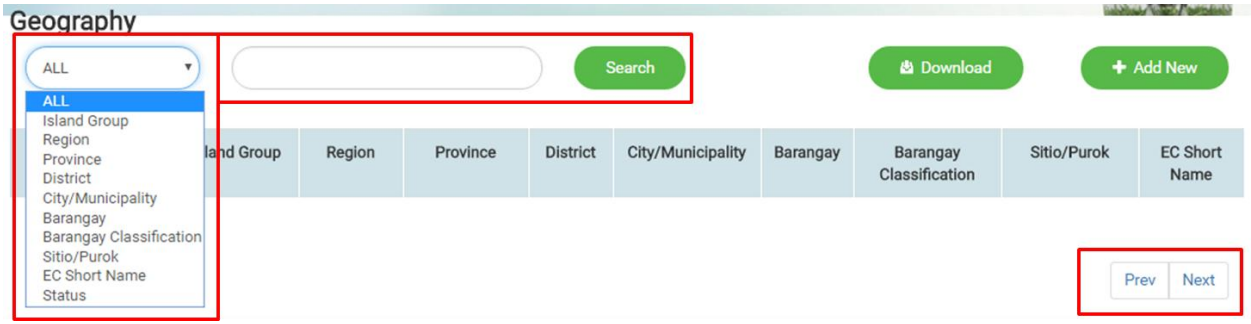
10. System will revert back to the Geography list screen.




### 4.2.2 Search a Geography

1. From the *Geography* search screen, select Filter.
   - ALL
   - By Island Group, Region, Province, District, etc.
2. Enter keyword.
3. Click **Search** button.

Click **Previous** or **Next** button to view search results in other pages.





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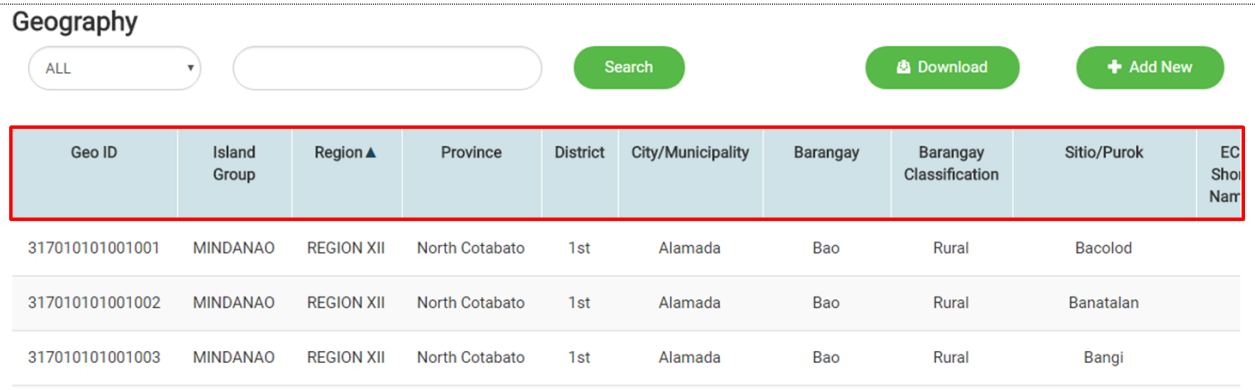
### 4.2.3 Sort Search Results

1. From the *Geography* list screen, click a column header to sort list.
    - Geo ID, Island Group, Region, etc.

Sorting rearranges the entries alphabetically A-Z or Z-A. Click to sort again in the reverse order.





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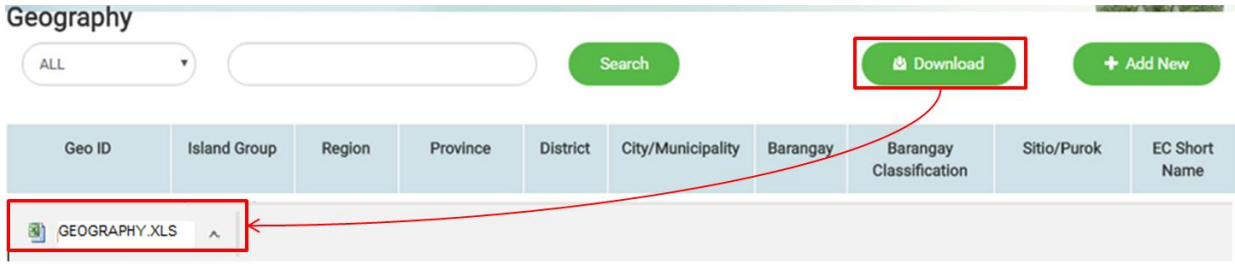
### 4.2.4 Download Geography List

1. From the *Geography* list screen, click the **Download** button.

   Download file on a per Region level to prevent large volume of data being downloaded.

2. Geography list will be downloaded in an excel format.

3. Click the file to open and save in computer.





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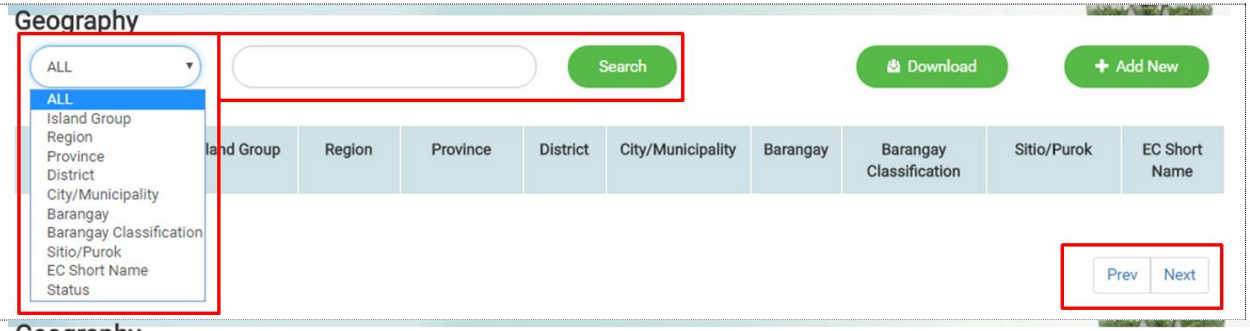
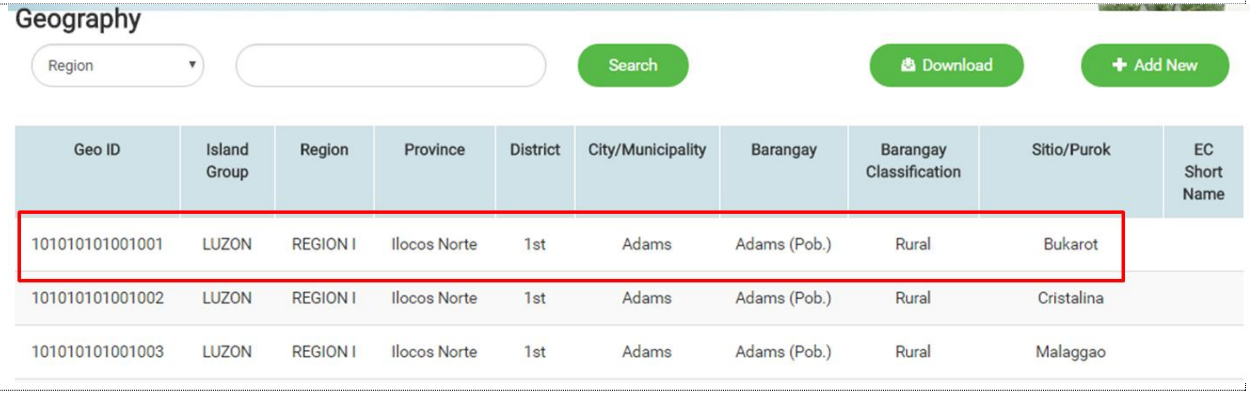
### 4.2.5 View Geography

1. From the *Geography* list screen, search the Geography to be viewed.




2. Click desired Geography.





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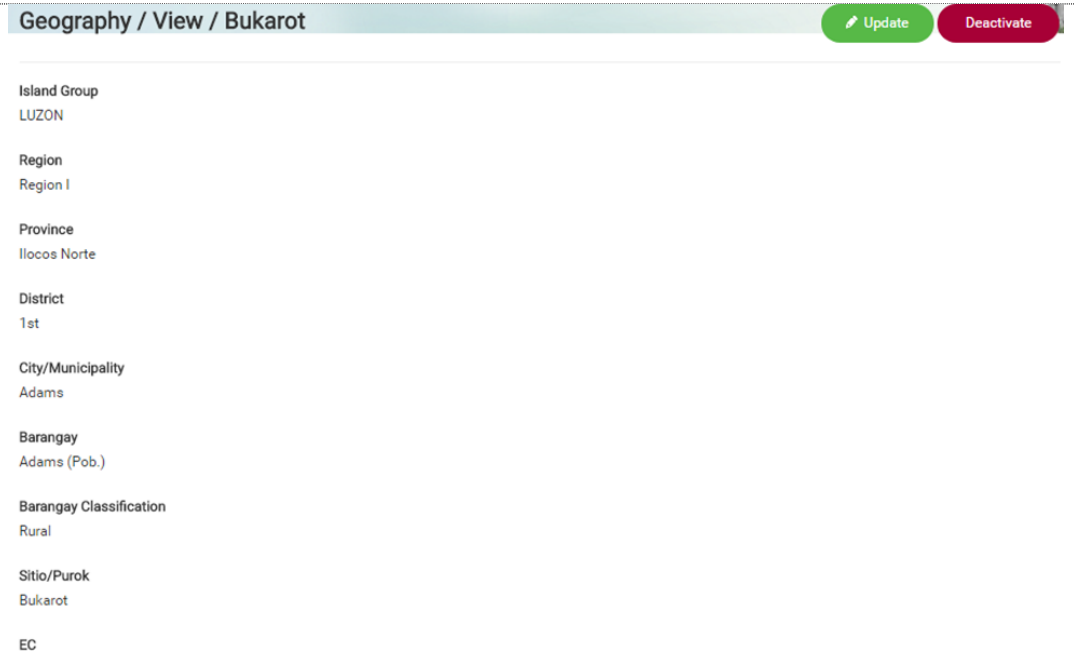
| | |
|---|---|
| 3. System will display the *Geography* details page. |  |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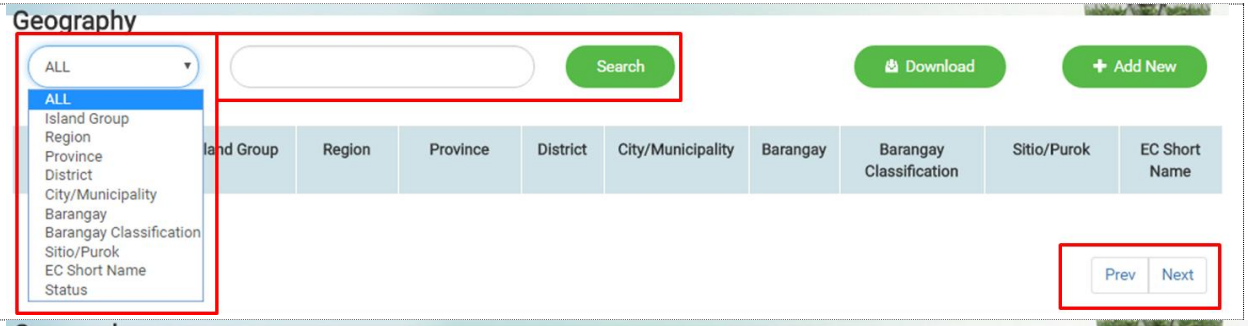
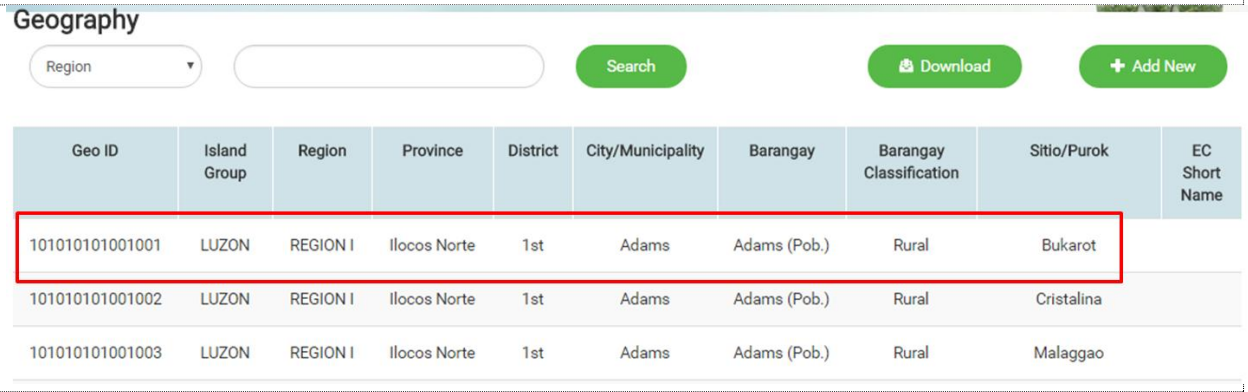
### 4.2.6 Update Geography

| | |
|---|---|
| 1. From the *Geography* list screen, search the Geography to be updated. |  |
| 2. Click desired Geography. |  |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| | |
|---|---|
| 3. System will display the *Geography* details page.<br><br>4. Click **Update** button. | |


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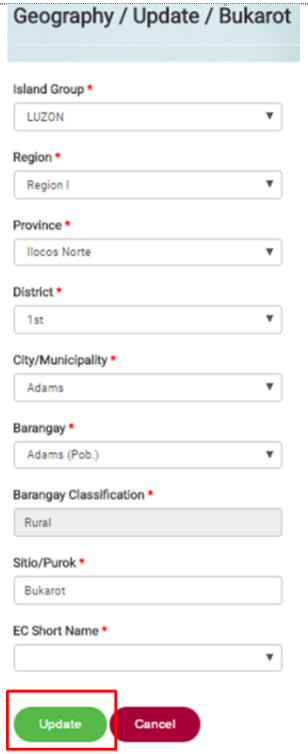
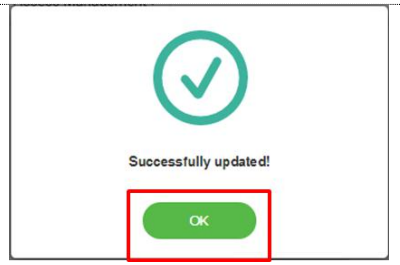
| | |
|---|---|
| 5. System will display the *Geography/Update* details page.<br><br>6. Update Geography details.<br><br>7. Click **Update** button. |  |
| 8. System will display a prompt.<br><br>9. Click **OK** button. |  |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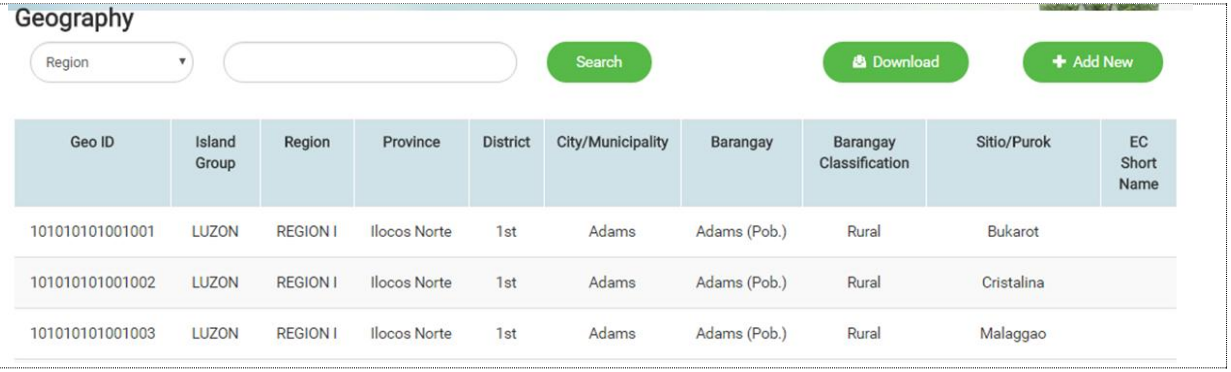
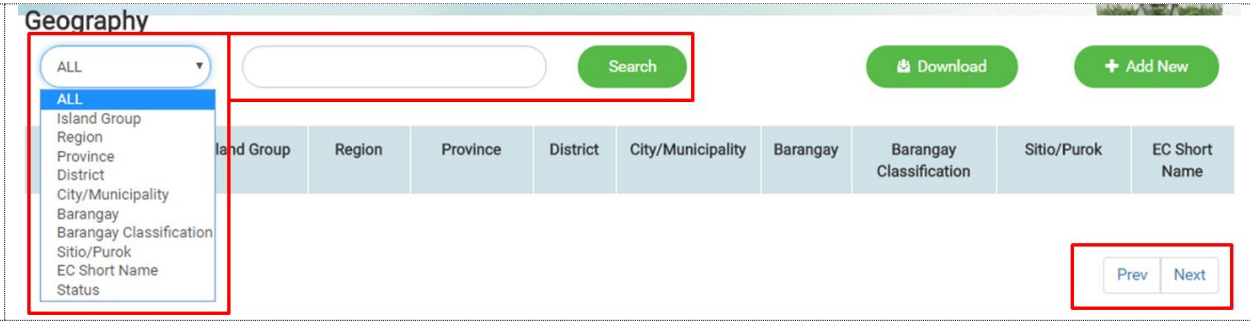
10. System will revert back to the *Geography* list screen.




### 4.2.7 Deactivate Geography

1. From the *Geography* list screen, search the Geography to be deactivated.





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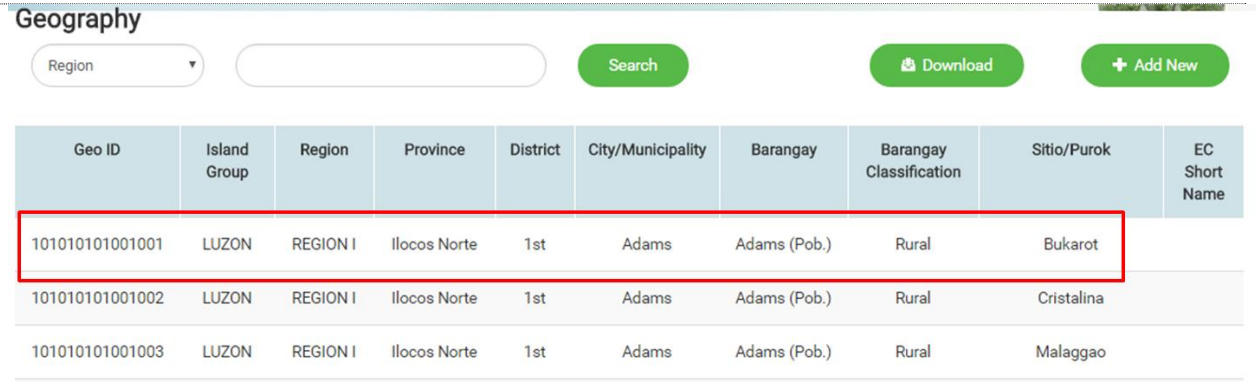
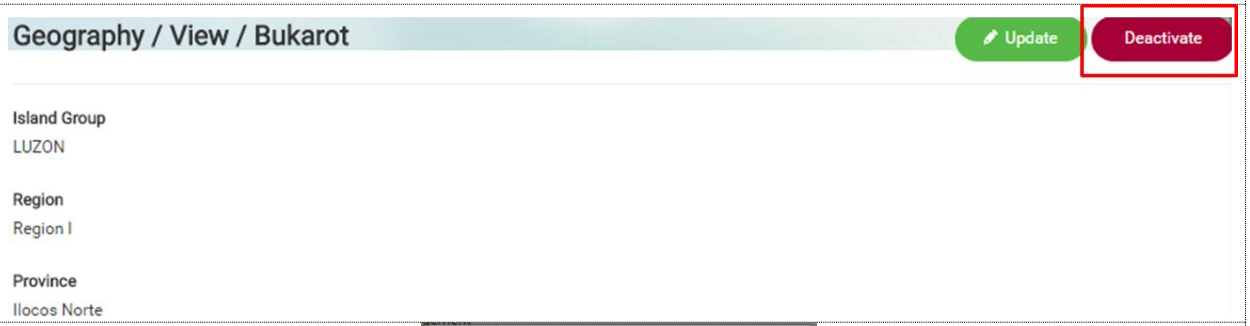
2. Click desired Geography.




3. System will display the *Geography* details page.

4. Click **Deactivate** button.




5. System will display a confirmation prompt.

6. Click **Yes** button to confirm deactivation.

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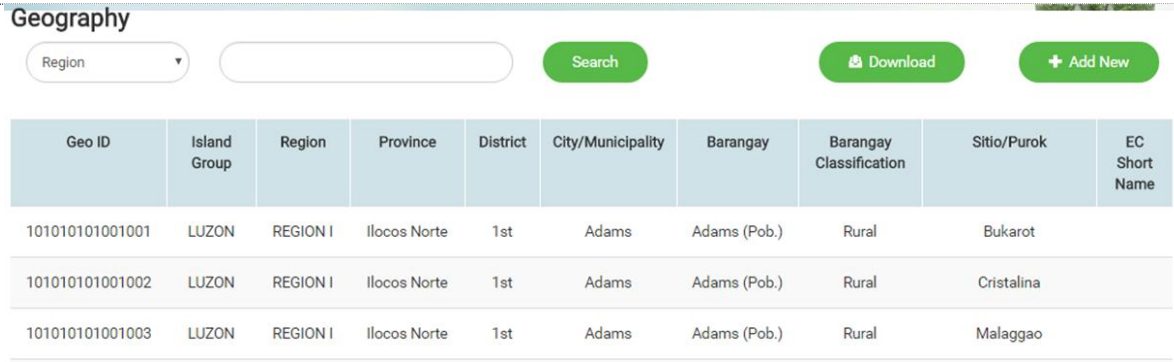
| | |
|---|---|
| 7. System will display a prompt.<br><br>8. Click **OK** button. | |
| 9. System will revert back to the *Geography* list screen. |  |

| Geo ID | Island Group | Region | Province | District | City/Municipality | Barangay | Barangay Classification | Sitio/Purok | EC Short Name |
|---|---|---|---|---|---|---|---|---|---|
| 101010101001001 | LUZON | REGION I | Ilocos Norte | 1st | Adams | Adams (Pob.) | Rural | Bukarot | |
| 101010101001002 | LUZON | REGION I | Ilocos Norte | 1st | Adams | Adams (Pob.) | Rural | Cristalina | |
| 101010101001003 | LUZON | REGION I | Ilocos Norte | 1st | Adams | Adams (Pob.) | Rural | Malaggao | |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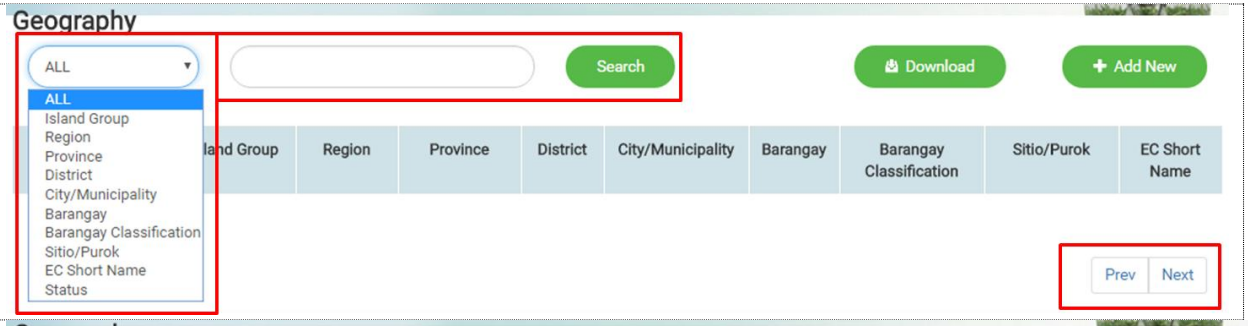
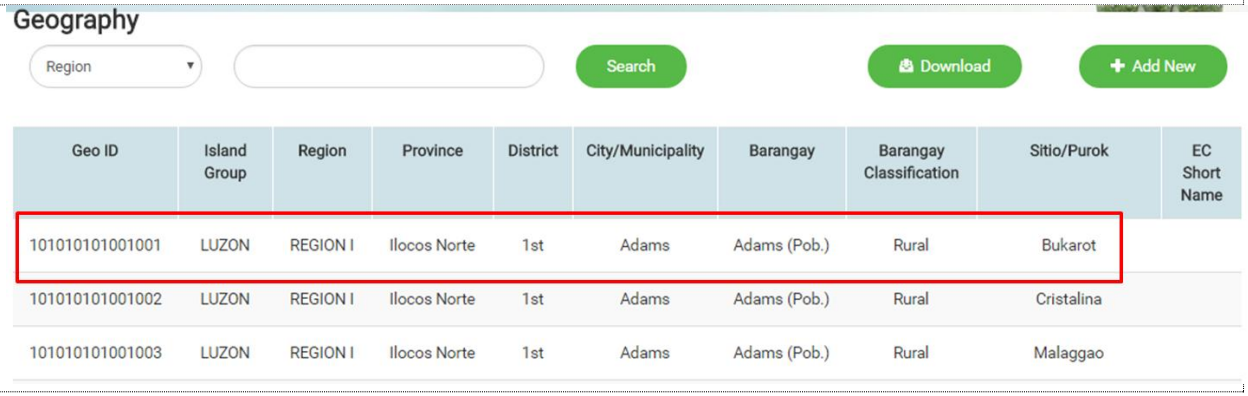
### 4.2.8 Activate Geography

| | |
|---|---|
| 1. From the *Geography* list screen, search the Geography to be activated. |  |
| 2. Click desired Geography. |  |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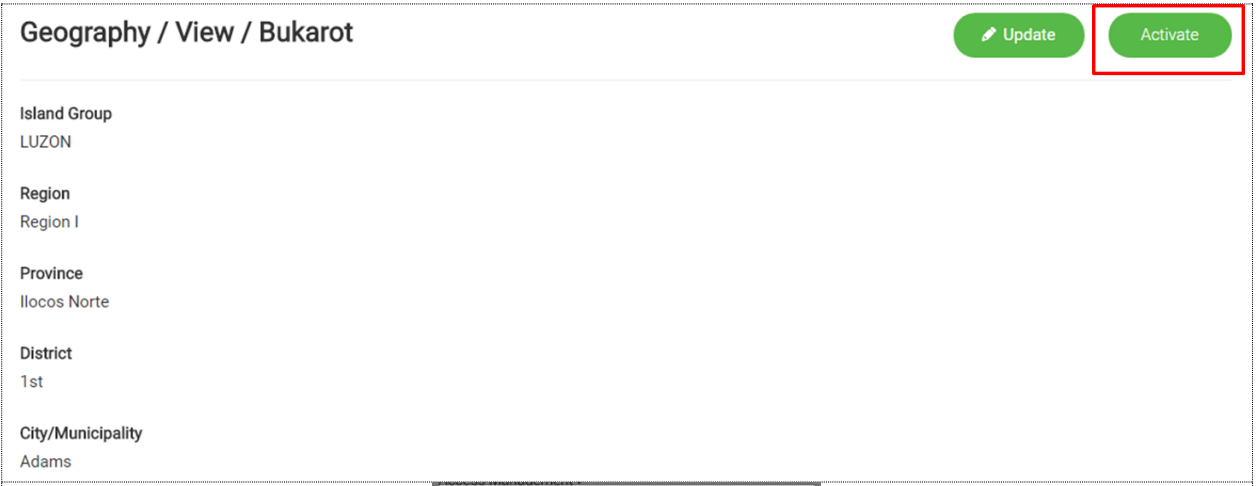
| | |
|---|---|
| 3. System will display the *Geography* details page.<br><br>4. Click **Activate** button. |  |
| 5. System will display a confirmation prompt.<br><br>6. Click **Yes** button to confirm activation. | |
| 7. System will display a prompt.<br><br>8. Click **OK** button. | |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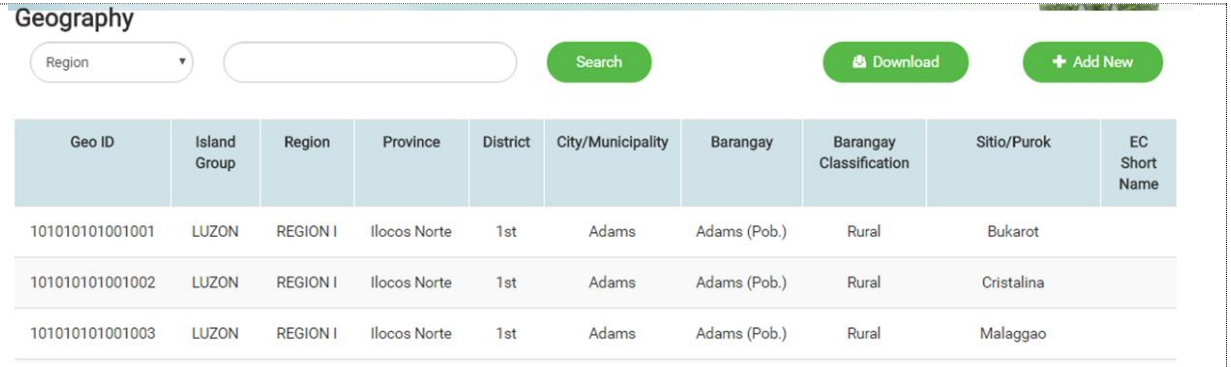
9. System will revert back to the *Geography* list screen.




| Geo ID | Island Group | Region | Province | District | City/Municipality | Barangay | Barangay Classification | Sitio/Purok | EC Short Name |
|---|---|---|---|---|---|---|---|---|---|
| 101010101001001 | LUZON | REGION I | Ilocos Norte | 1st | Adams | Adams (Pob.) | Rural | Bukarot | |
| 101010101001002 | LUZON | REGION I | Ilocos Norte | 1st | Adams | Adams (Pob.) | Rural | Cristalina | |
| 101010101001003 | LUZON | REGION I | Ilocos Norte | 1st | Adams | Adams (Pob.) | Rural | Malaggao | |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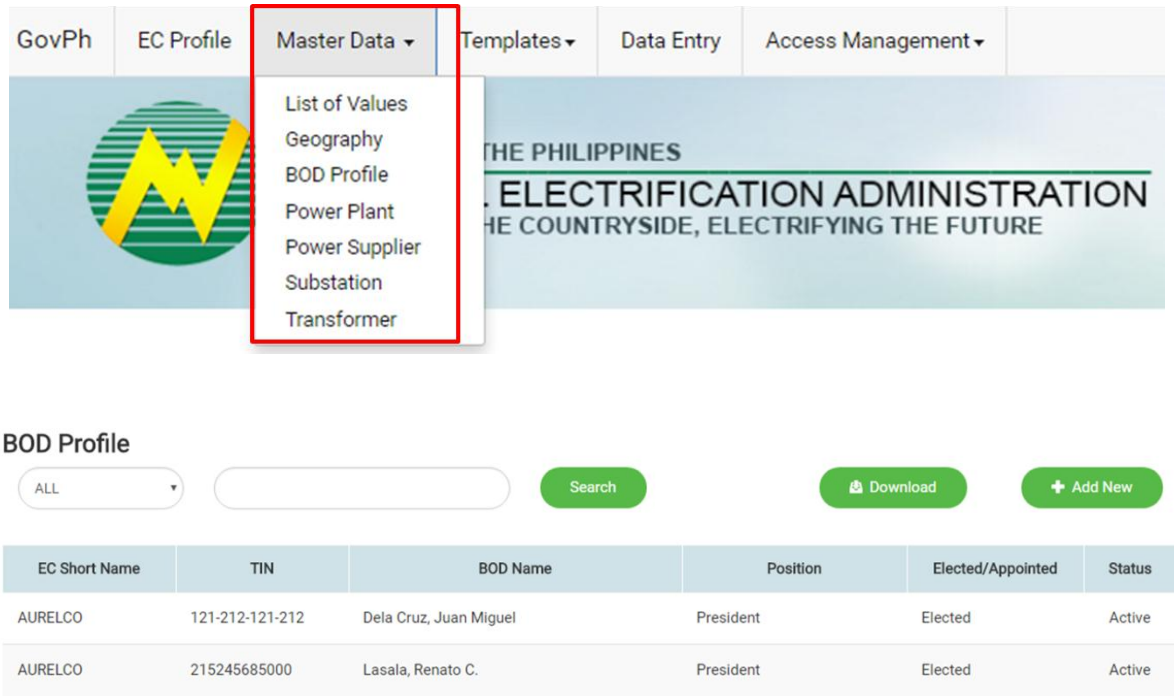
## 4.3 BOD Profile Submenu

1. Select **Master Data > BOD Profile** from the Menu tab.

2. *BOD Profile* list will be displayed.





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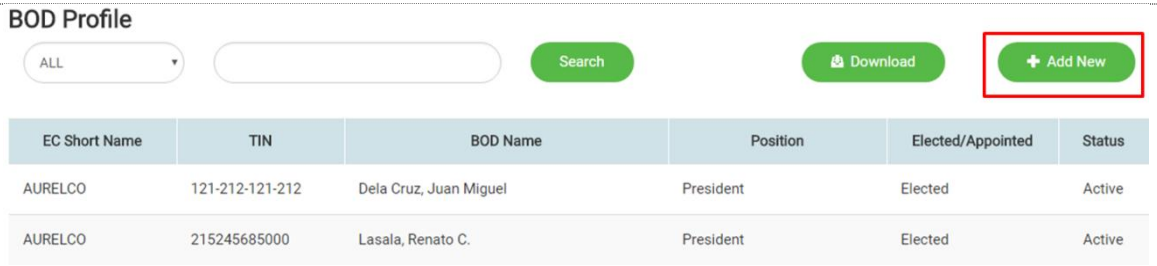
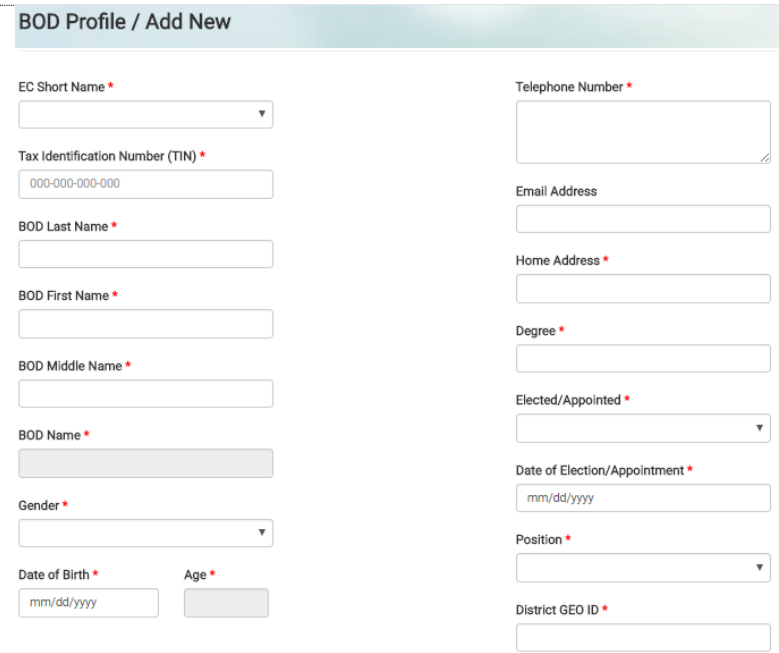
### 4.3.1 Add new BOD Profile

1. Click **+ Add New** button in the BOD Profile list screen.




2. Fill-out the fields in the *Geography/Add New* screen.

Fields with asterisk are required.





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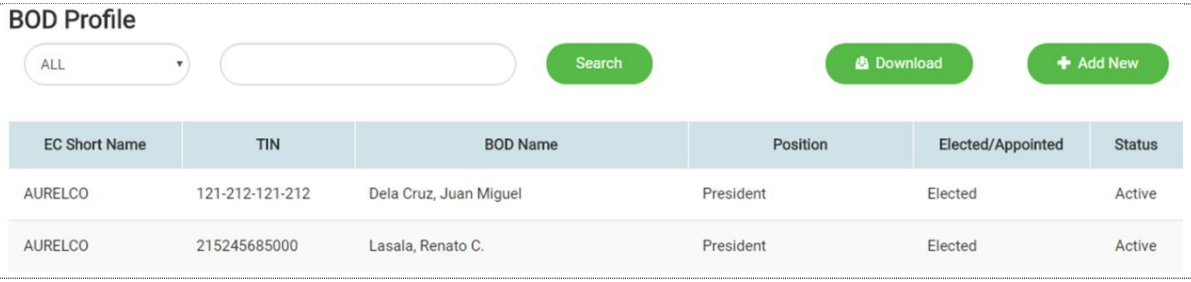
| | |
|---|---|
| 3. Click **Save** button to save the new geography record.<br><br>Clicking **Clear** button will reset previously selected/entered values. | |
| 4. System will display a prompt.<br><br>5. Click **OK** button on the prompt. | |
| 6. System will revert back to the BOD Profile list screen. |  |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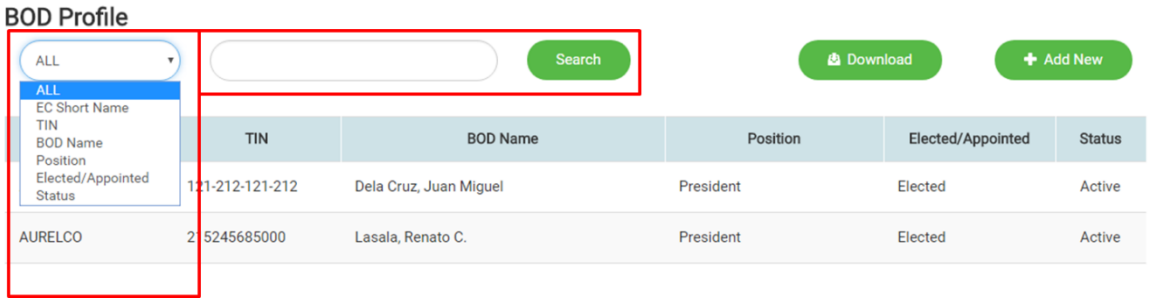
### 4.3.2 Search a BOD Profile

1. From the *BOD Profile* search screen, select Filter.
   - ALL
   - By EC Short Name, TIN, BOD Name, etc.
2. Enter keyword.
3. Click **Search** button.

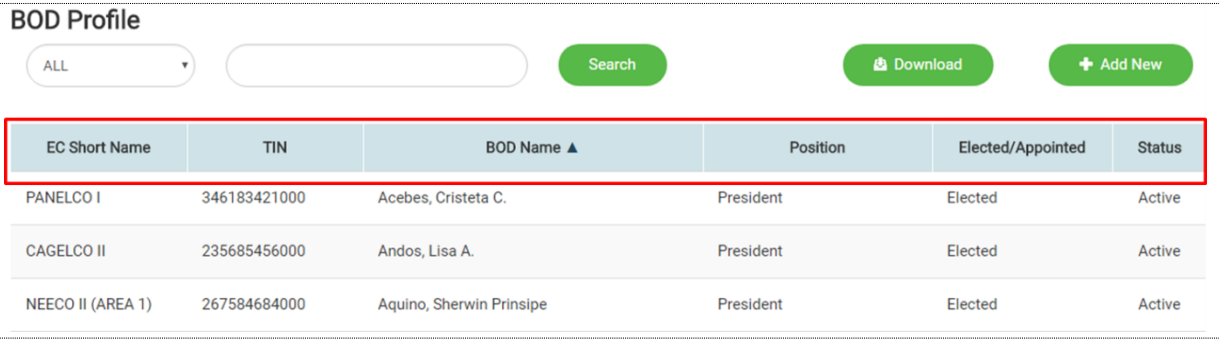
Click **Previous** or **Next** button to view search results in other pages.




### 4.3.3 Sort Search Results

1. From the *BOD Profile* list screen, click a column header to sort list.
   a. EC Short Name, TIN, BOD Name, etc.

Sorting rearranges the entries alphabetically A-Z or Z-A. Click to sort again in the reverse order.





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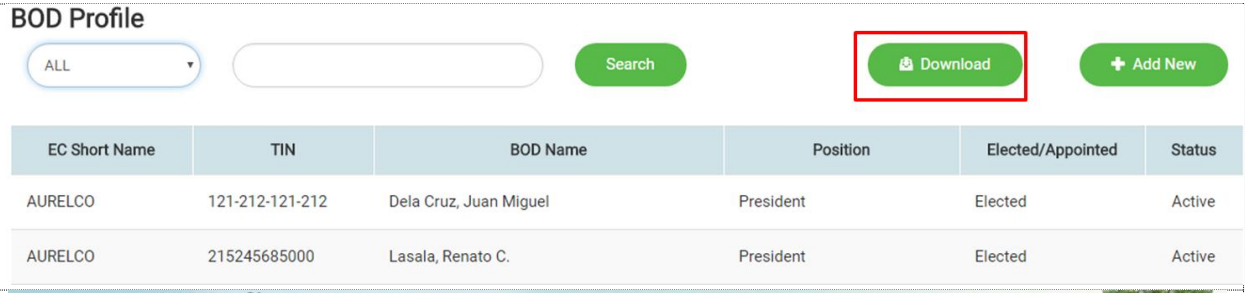
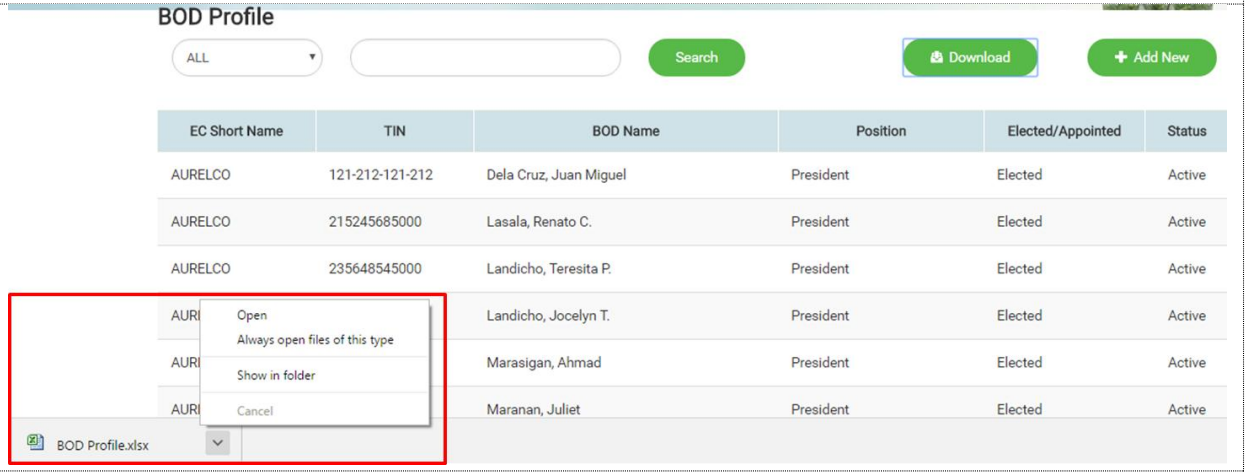
### 4.3.4 Download BOD Profile List

1. From the *BOD Profile* list screen, click the **Download** button.




2. BOD Profile list will be downloaded in an excel format.

3. Click the file to open and save in computer.





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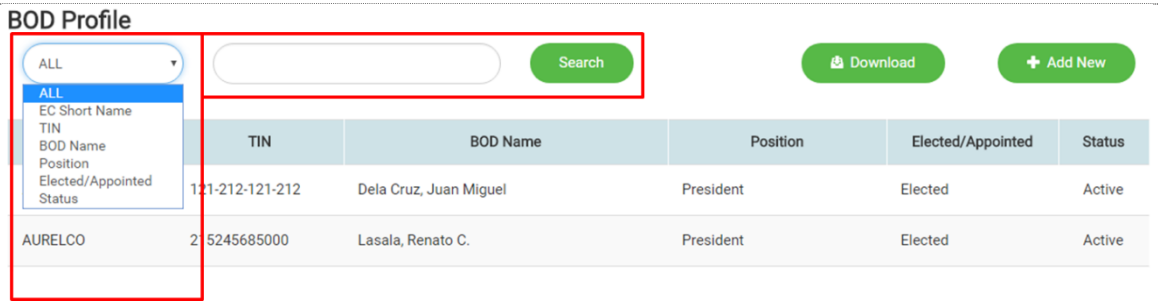
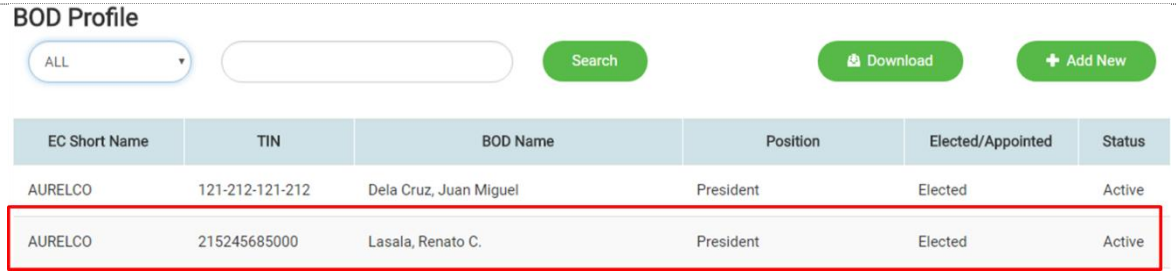
### 4.3.5 View BOD Profile

| | |
|---|---|
| 1. From the *BOD Profile* list screen, search the BOD Profile to be viewed. |  |
| 2. Click desired BOD Profile to be viewed. |  |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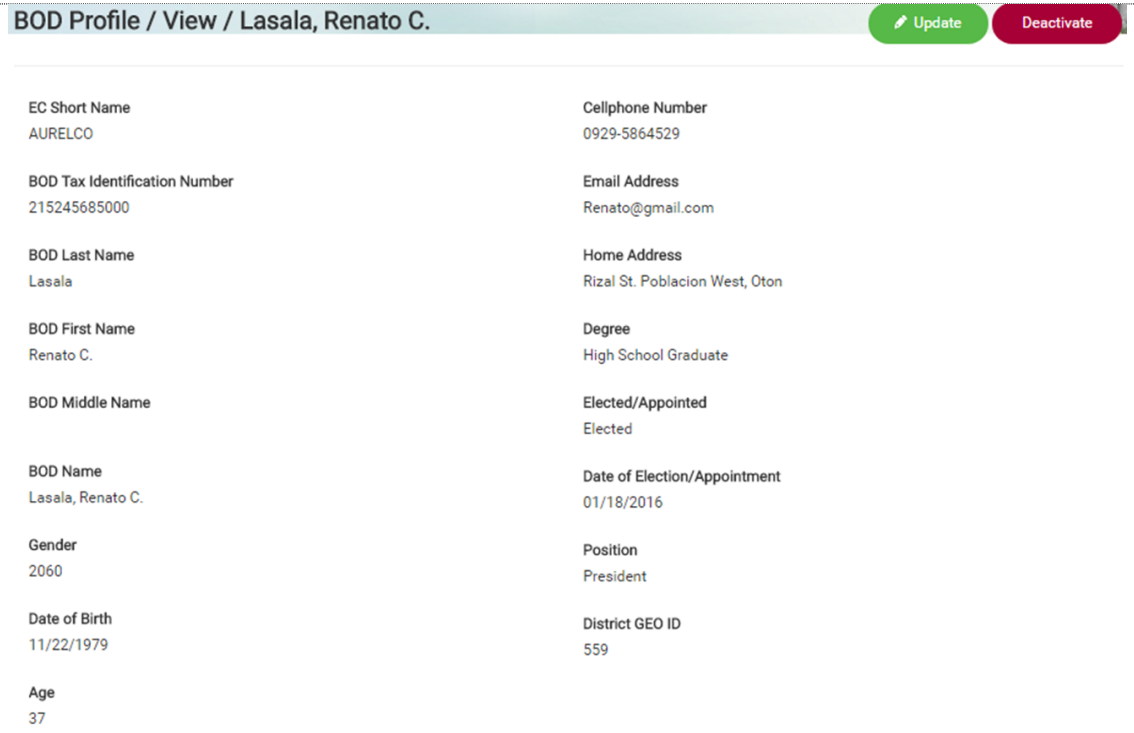
3. System will display the *BOD Profile* details page.





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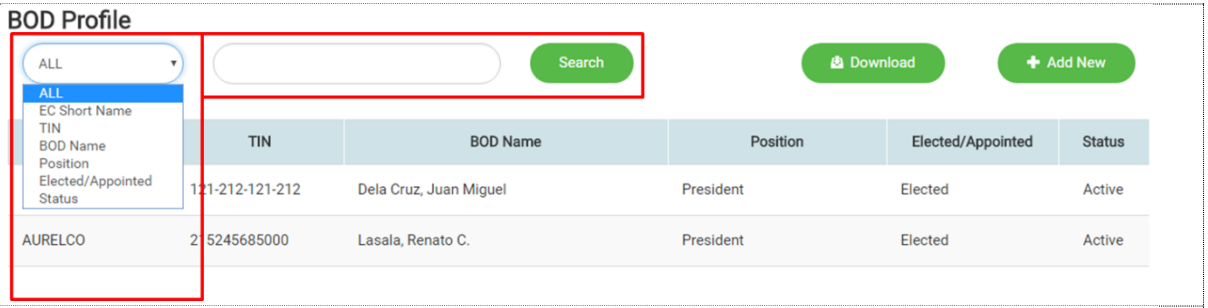
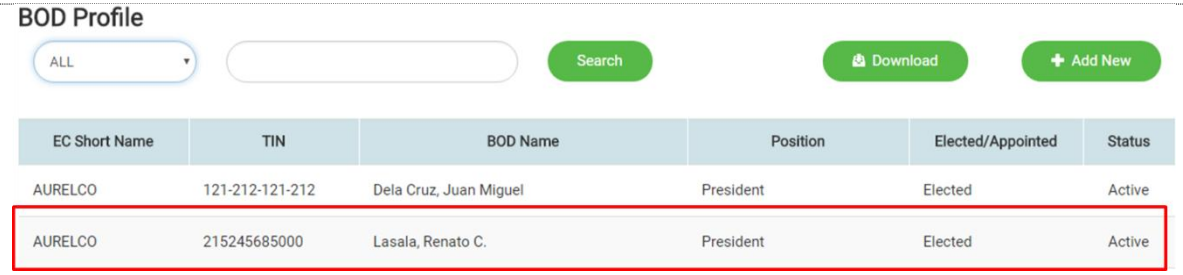
### 4.3.6 Update BOD Profile

| | |
|---|---|
| 1. From the *BOD Profile* list screen, search the BOD Profile to be updated. |  |
| 2. Click desired BOD Profile to be updated. |  |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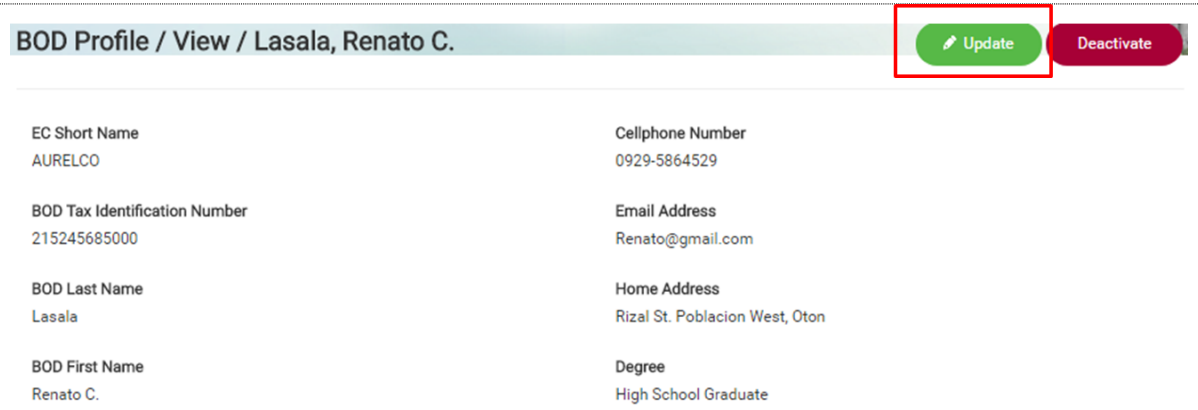
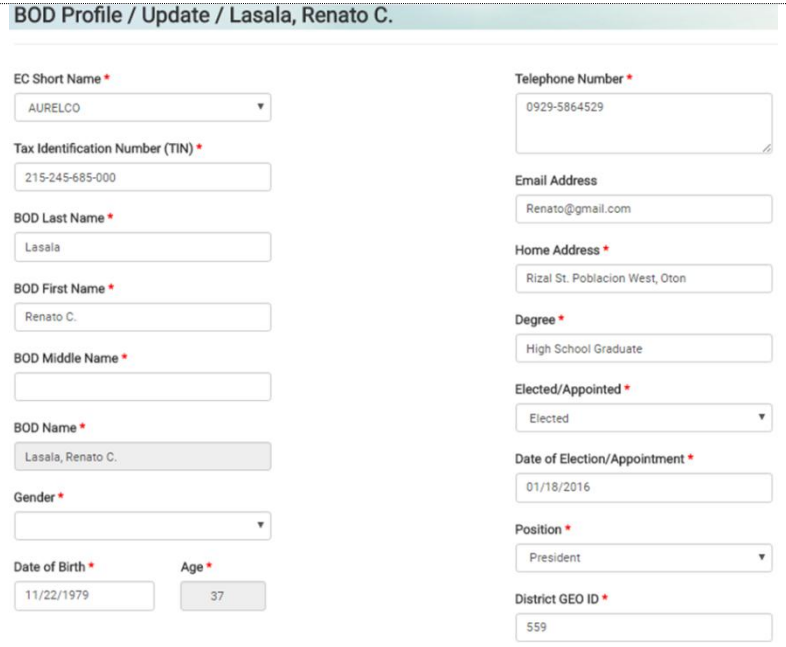
| | |
|---|---|
| 3. System will display the *BOD Profile* details page.<br><br>4. Click **Update** button. |  |
| 5. System will display the *BOD Profile/Update* details page.<br><br>6. Update BOD Profile details. |  |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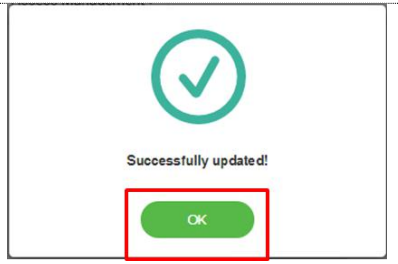
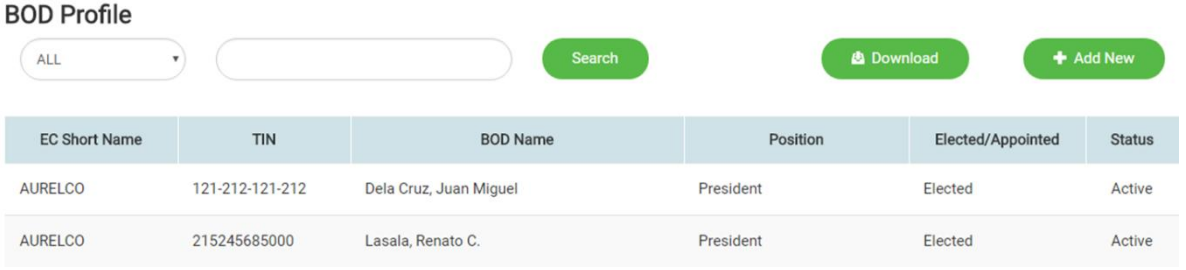
| | |
|---|---|
| 7. Click **Update** button to save update. | |
| 8. System will display a prompt.<br>9. Click **OK** button. |  |
| 10. System will revert back to the BOD Profile list screen. |  |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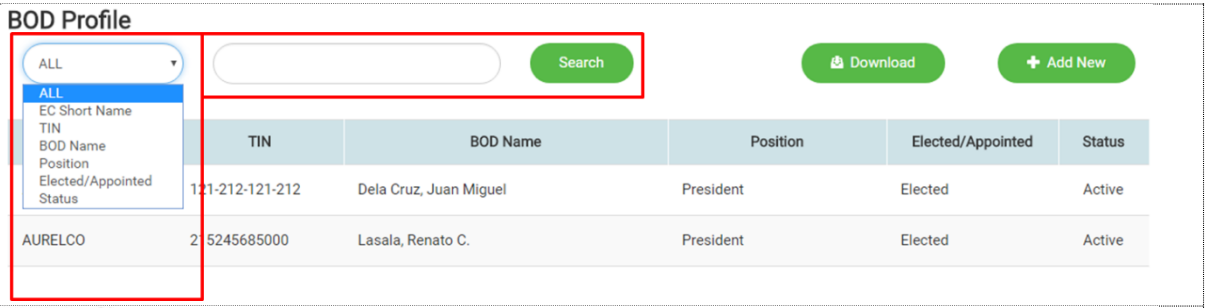
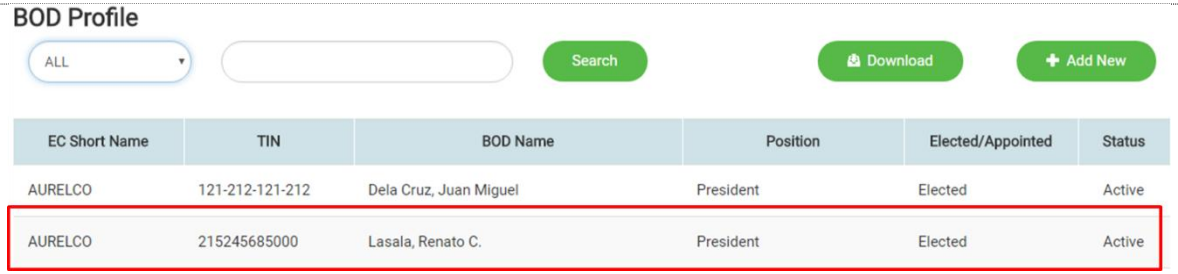
### 4.3.7 Deactivate BOD Profile

| | |
|---|---|
| 1. From the *BOD Profile* list screen, search the BOD Profile to be deactivated. |  |
| 2. Click desired BOD Profile to be deactivated. |  |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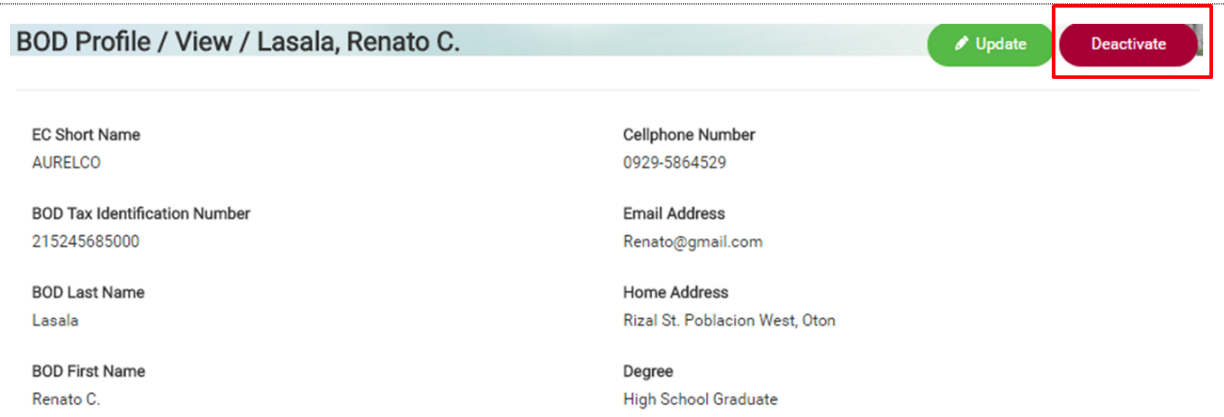
| | |
|---|---|
| 3. System will display the *BOD Profile* details page.<br><br>4. Click **Deactivate** button. |  |
| 5. System will display a confirmation prompt.<br><br>6. Click **Yes** button to confirm deactivation. | |
| 7. System will display a prompt.<br><br>8. Click **OK** button. | |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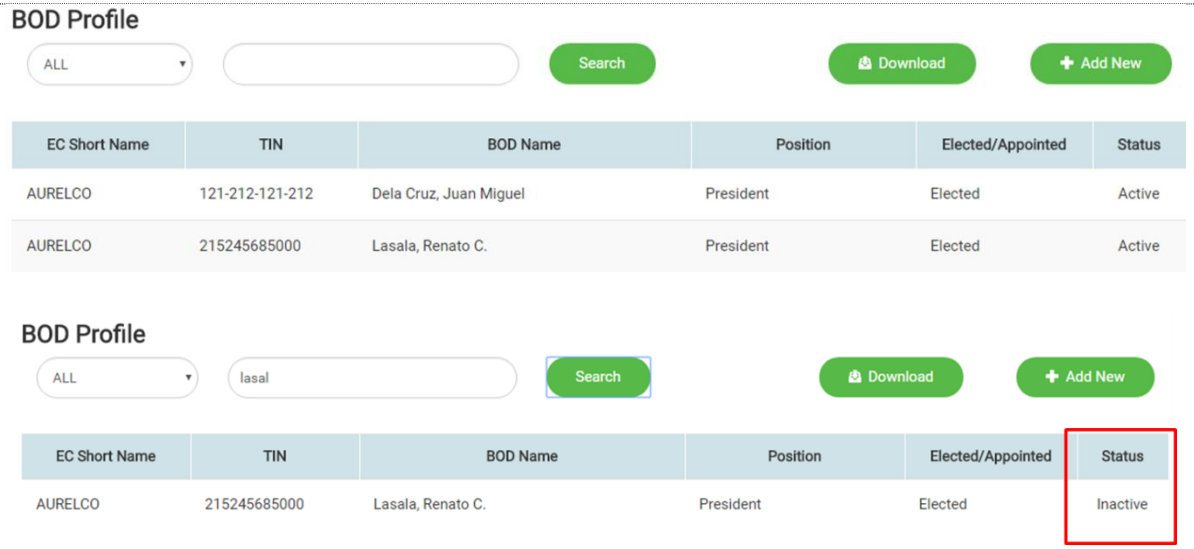
9. System will revert back to the BOD Profile list screen.

When BOD Profile is checked, status becomes Inactive.





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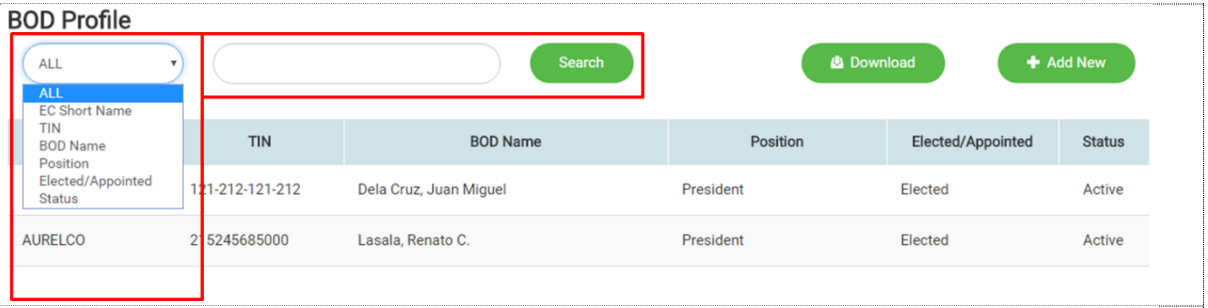
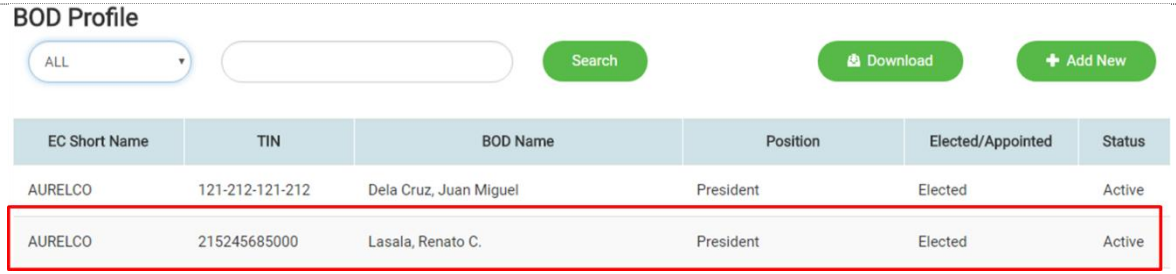
### 4.3.8 Activate BOD Profile

| | |
|---|---|
| 1. From the *BOD Profile* list screen, search the BOD Profile to be activated. |  |
| 2. Click desired BOD Profile to be activated. |  |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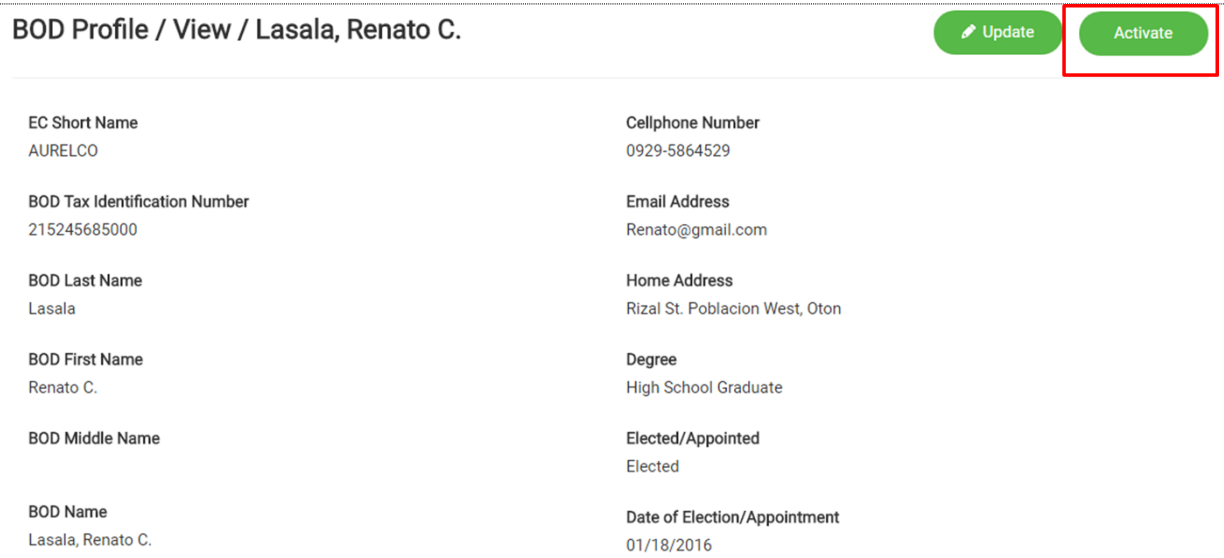
| | |
|---|---|
| 3. System will display the *BOD Profile* details page.<br><br>4. Click **Activate** button. |  |
| 5. System will display a confirmation prompt.<br><br>6. Click **Yes** button to confirm activation. | |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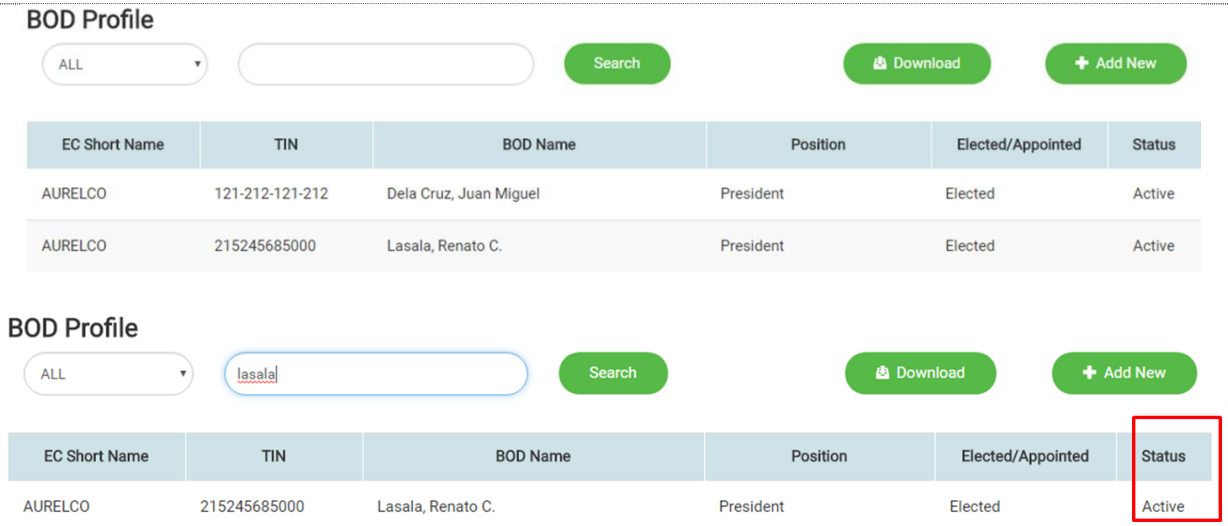
7. System will display a prompt.
8. Click **OK** button.

9. System will revert back to the BOD Profile list screen.

When BOD Profile is checked, status becomes Active.





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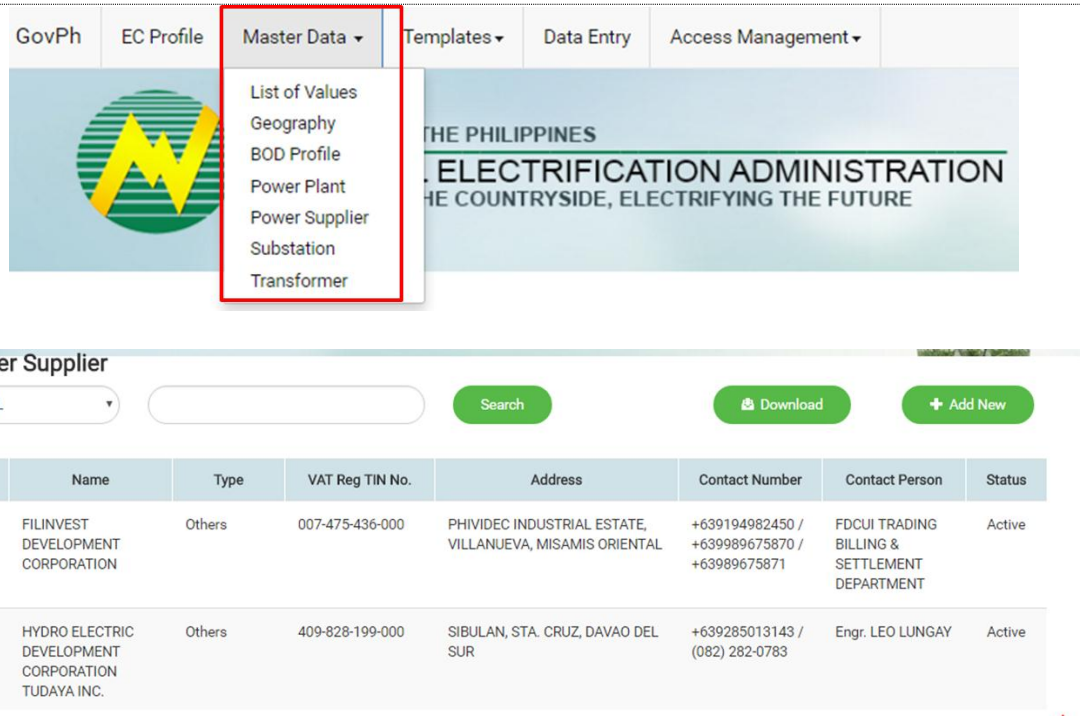
## 4.4 Power Supplier Submenu

1. Select **Master Data > Power Supplier** from the Menu tab.

2. *Power Supplier* list will be displayed.





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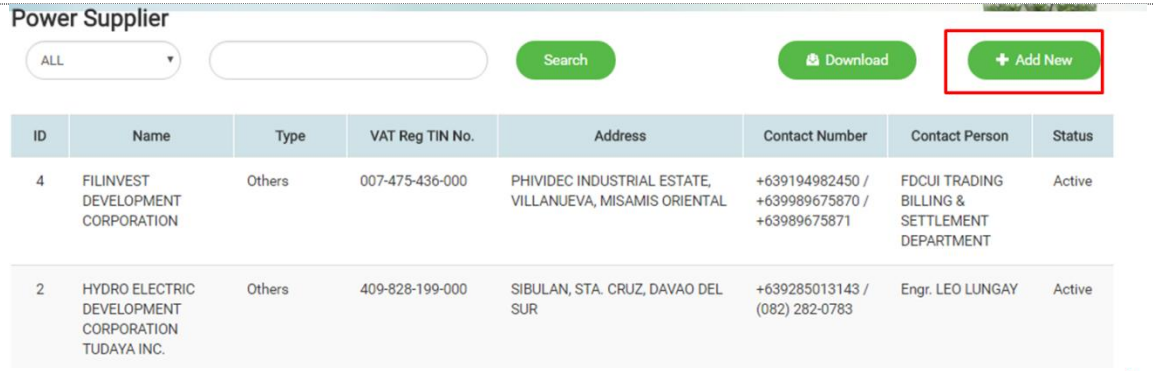
### 4.4.1 Add new Power Supplier

1. Click **+ Add New** button in the Power Supplier screen.





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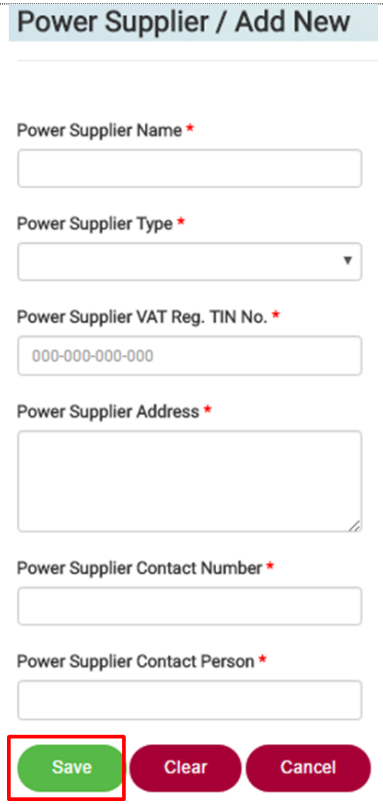
| | |
|---|---|
| 2. Fill-out the fields in the *Power Supplier/Add New* screen.<br><br>Fields with asterisk are required.<br><br>3. Select value from dropdown list (if applicable).<br><br>4. Click **Save** button to save the new Power Supplier record.<br><br>Clicking **Clear** button will reset previously selected/entered values. |  |
| 5. System will display a prompt.<br><br>6. Click **OK** button on the prompt. | |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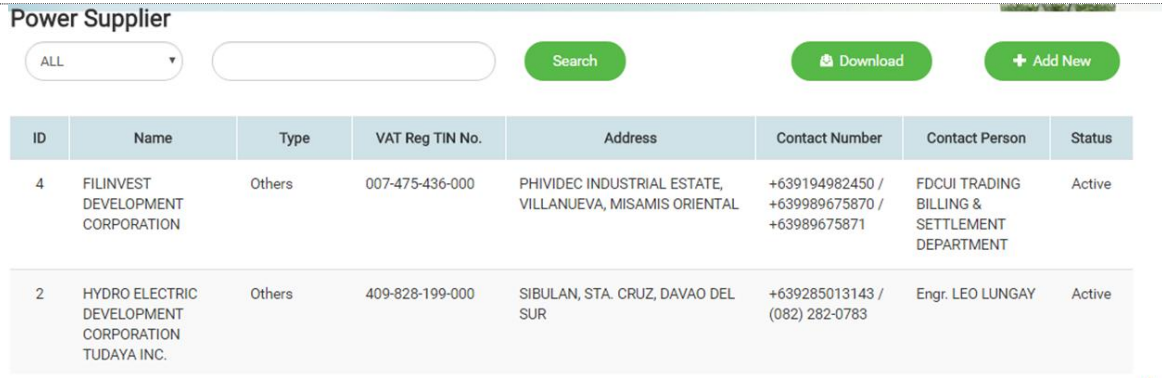
7. System will revert back to the Power Supplier list screen.




### 4.4.2 Search a Power Supplier

1. From the *Power Supplier* search screen, select Filter.
   - ALL
   - By Power Supplier Name, Power Supplier Type, etc.

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2. Enter keyword.

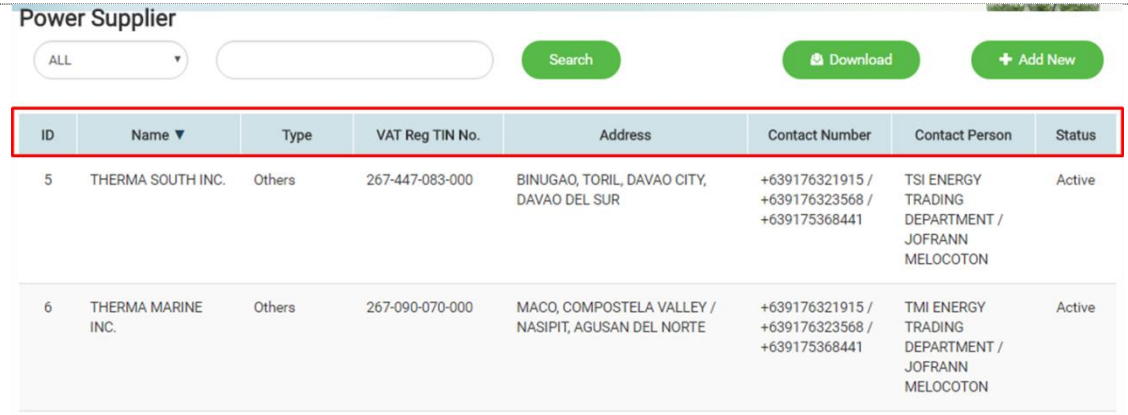
3. Click **Search** button.

Click **Previous** or **Next** button to view search results in other pages.

### 4.4.3 Sort Search Results

1. From the *Power Supplier* list screen, click a column header to sort list.
    - ID, Name, Type, etc.

Sorting rearranges the entries alphabetically A-Z or Z-A. Click to sort again in the reverse order.





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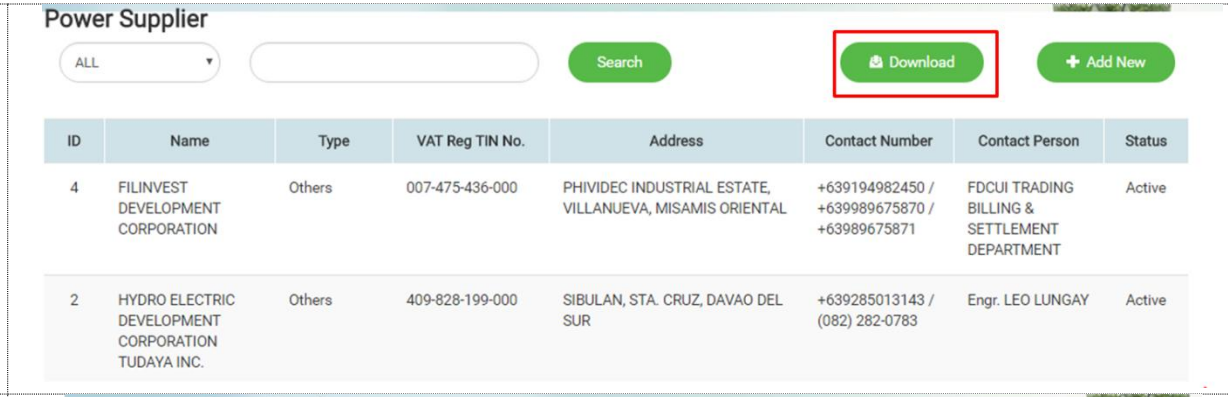
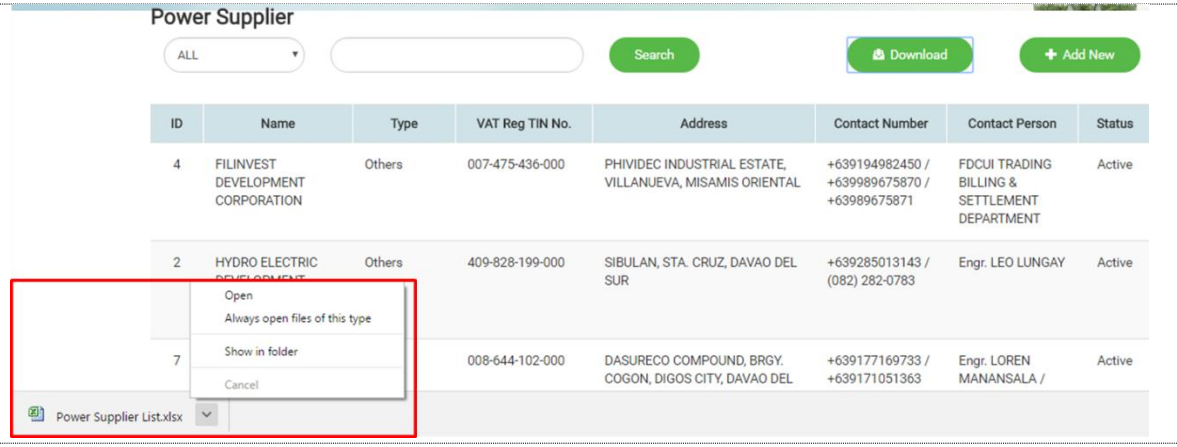
### 4.4.4 Download Power Supplier List

1. From the *Power Supplier* list screen, click the **Download** button.




2. Power Supplier list will be downloaded in an excel format.

3. Click the file to open and save in computer.





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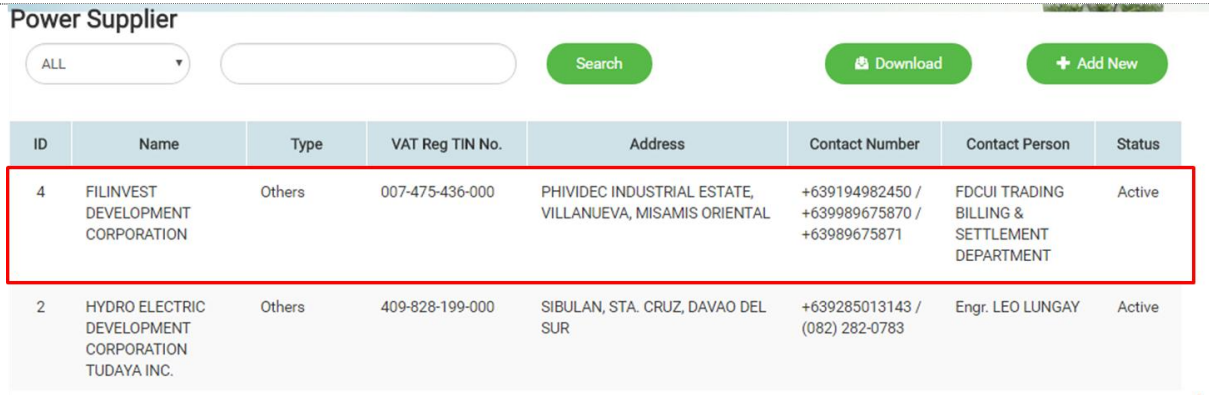
### 4.4.5 View Power Supplier

1. From the *Power Supplier* list screen, search the Power Supplier to be viewed.

2. Click desired Power Supplier to be viewed.





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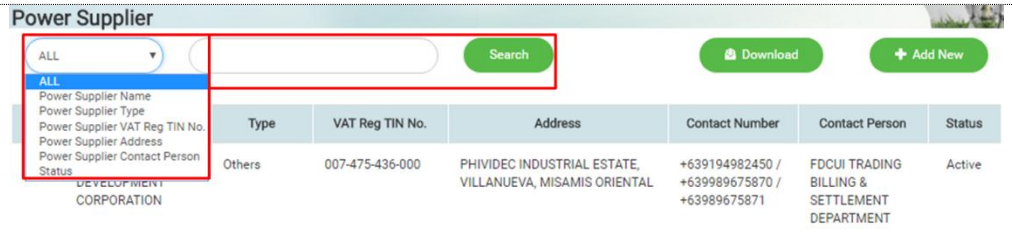
| | |
|---|---|
| 3. System will display the *Power Supplier* details page. | |



### 4.4.6 Update Power Supplier

| | |
|---|---|
| 1. From the *Power Supplier* list screen, search the Power Supplier to be updated. |  |

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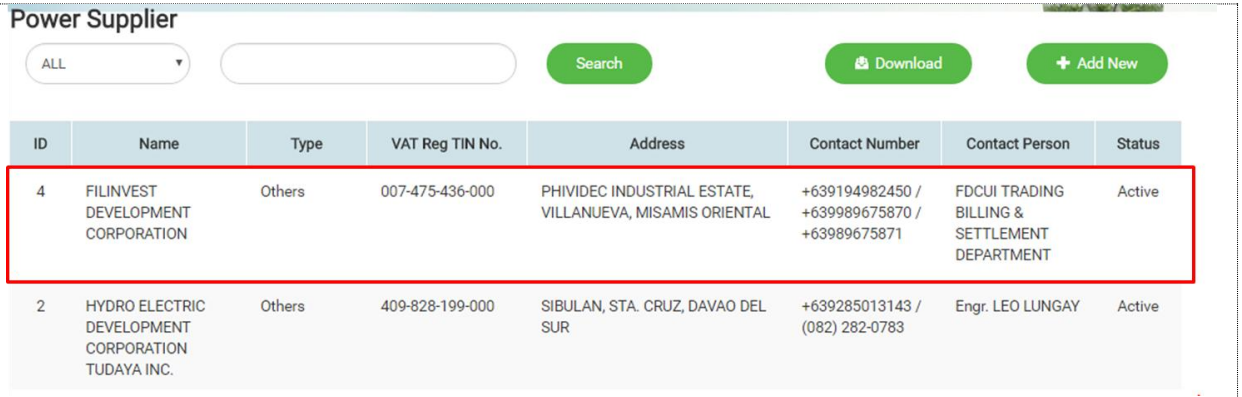
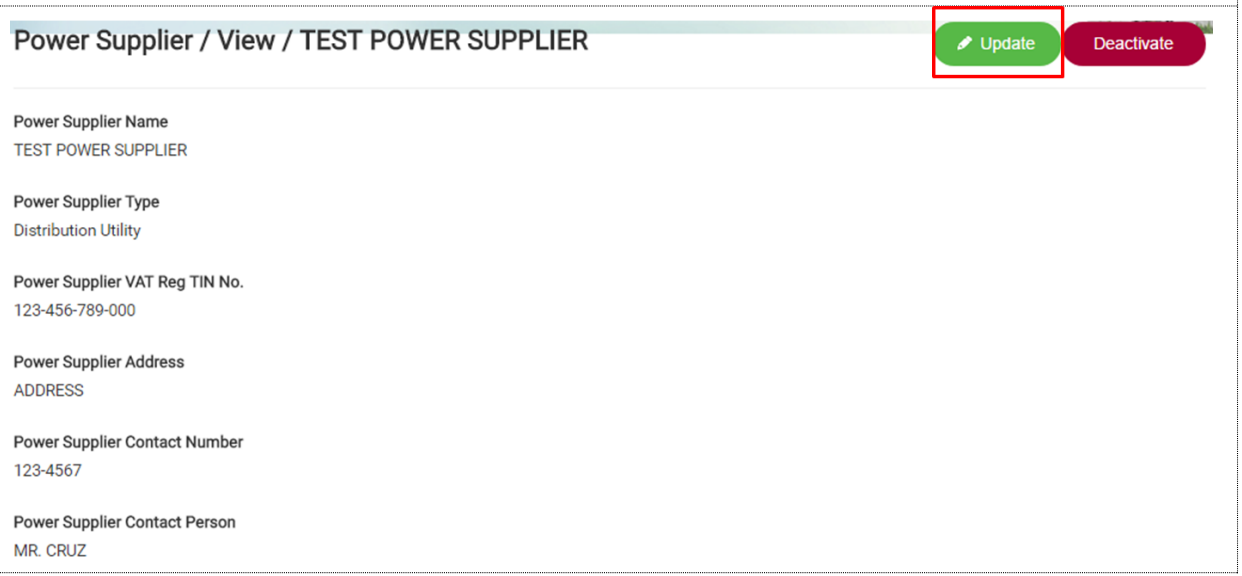
2. Click desired Power Supplier to be updated.




3. System will display the *Power Supplier* details page.

4. Click **Update** button.





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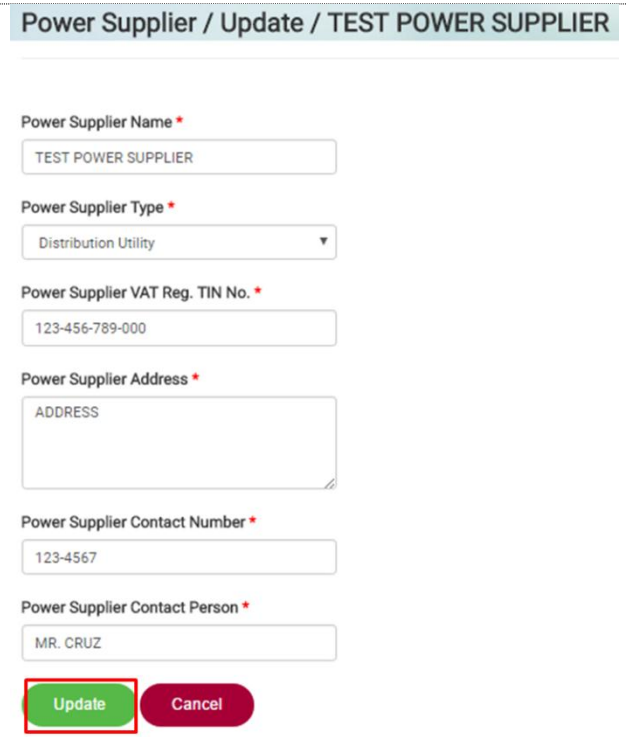
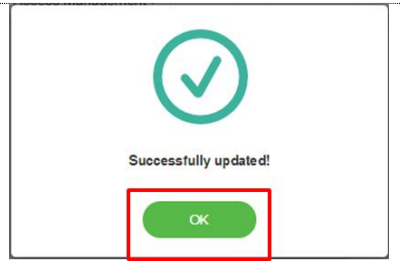
| | |
|---|---|
| 5. System will display the *Power Supplier/Update* details page.<br><br>6. Update Power Supplier details.<br><br>7. Click **Update** button. |  |
| 8. System will display a prompt.<br><br>9. Click **OK** button. |  |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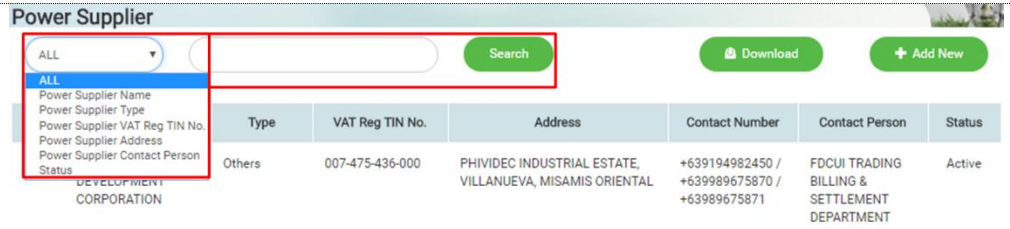
10. System will revert back to the *Power Supplier* list screen.

### 4.4.7 Deactivate Power Supplier

1. From the *Power Supplier* list screen, search the Power Supplier to be deactivated.





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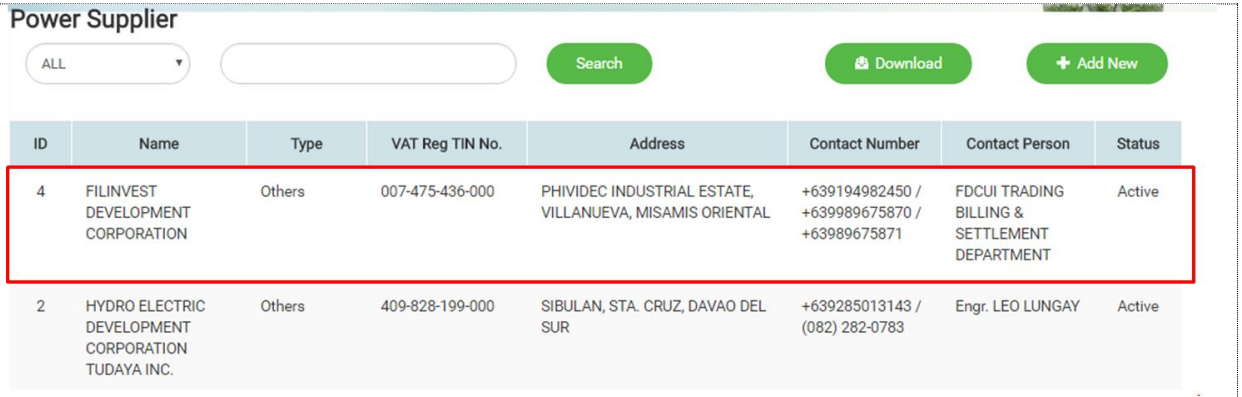
2. Click desired Power Supplier to be deactivated.




3. System will display the *Power Supplier* details page.

4. Click **Deactivate** button.

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| | |
|---|---|
| 5. System will display a confirmation prompt.<br><br>6. Click **Yes** button to confirm deactivation. | |
| 7. System will display a prompt.<br><br>8. Click **OK** button. | |


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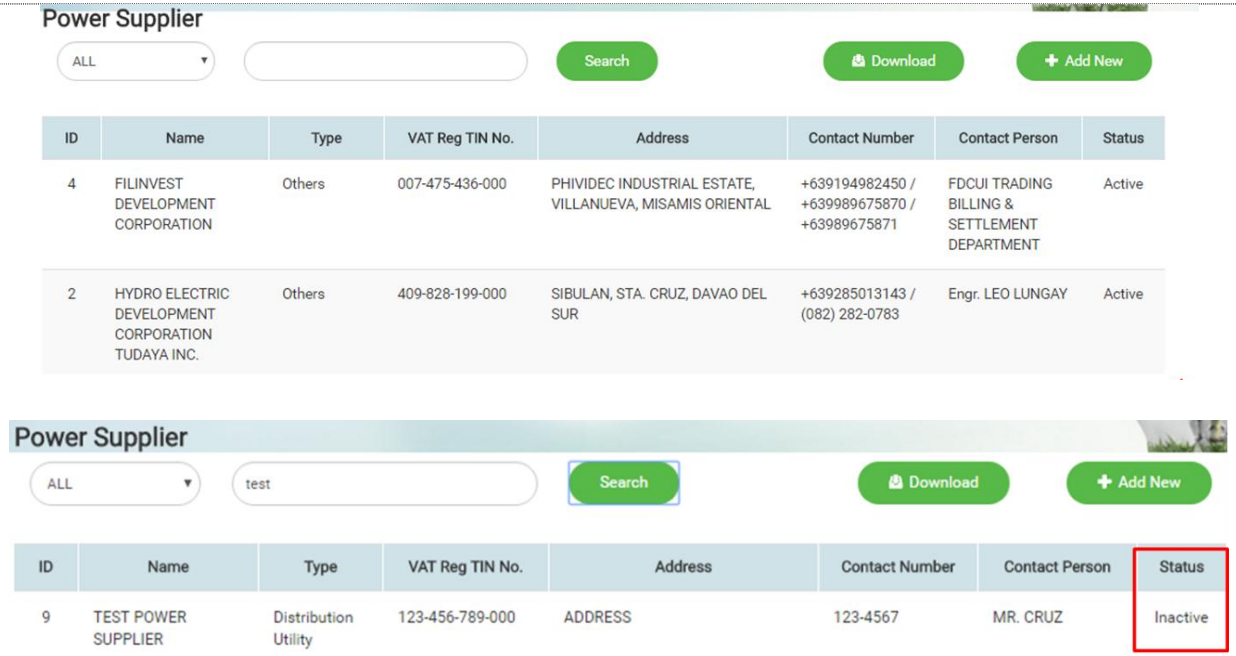
9. System will revert back to the Power Supplier list screen.

When Power Supplier is checked, status becomes Inactive.





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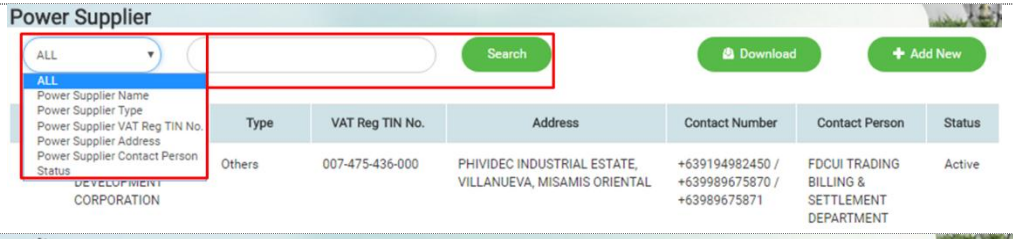
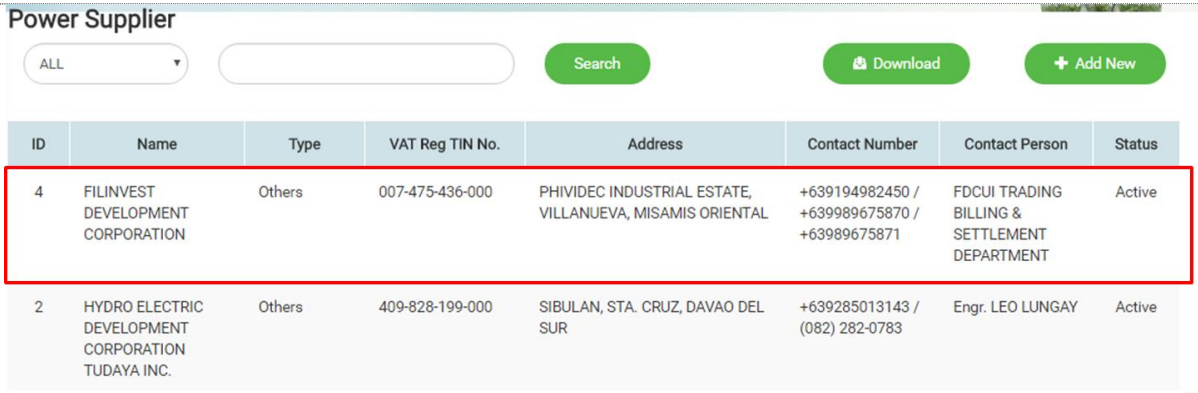
### 4.4.8 Activate Power Supplier

1. From the *Power Supplier* list screen, search the Power Supplier to be activated.




2. Click desired Power Supplier to be activated.





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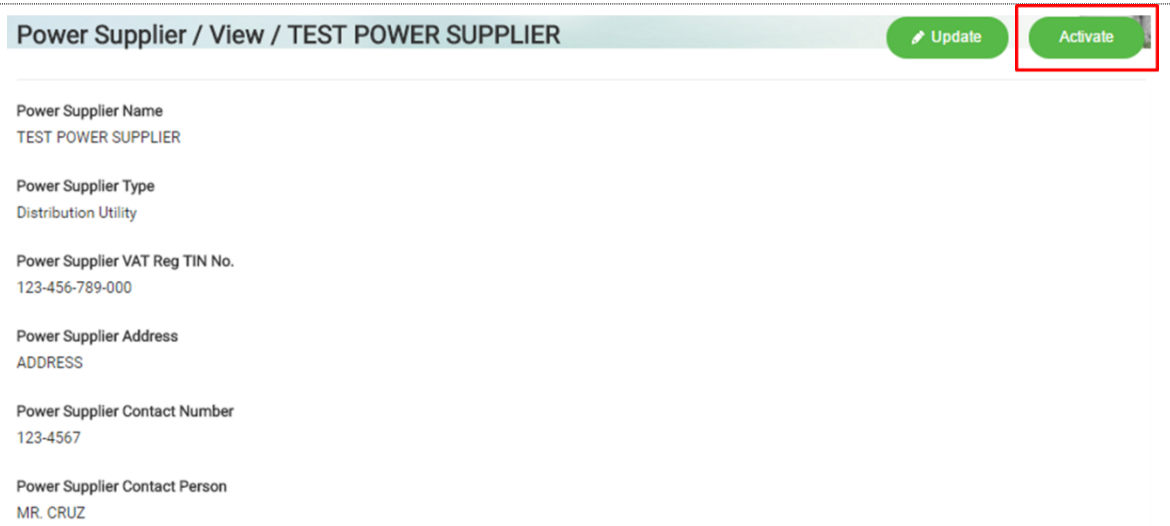
| | |
|---|---|
| 3. System will display the *Power Supplier* details page.<br><br>4. Click **Activate** button. |  |
| 5. System will display a confirmation prompt.<br><br>6. Click **Yes** button to confirm activation. | |
| 7. System will display a prompt.<br><br>8. Click **OK** button. | |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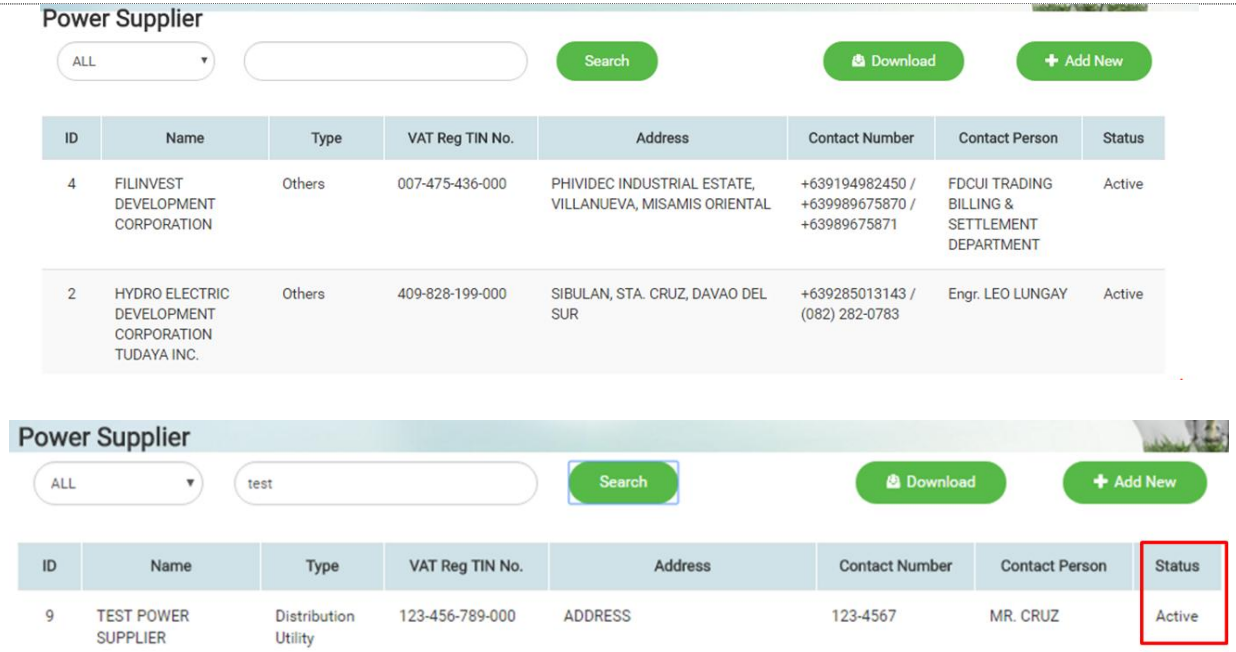
9. System will revert back to the Power Supplier list screen.

When Power Supplier is checked, status becomes Active.





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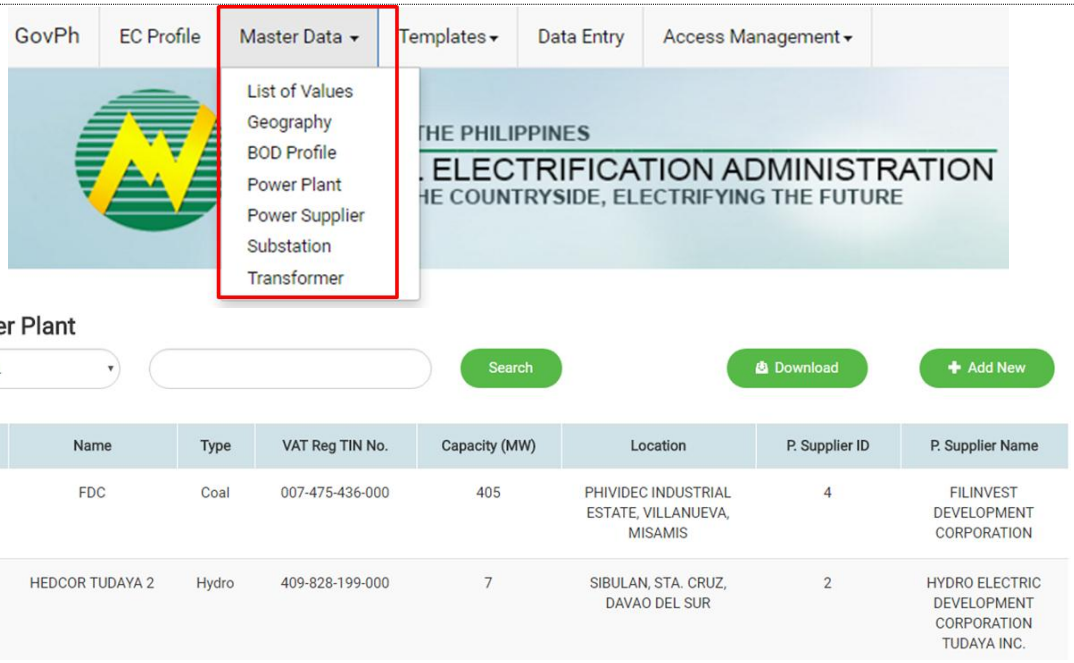
## 4.5 Power Plant Submenu

1. Select **Master Data > Power Plant** from the Menu tab.

2. *Power Plant* list will be displayed.





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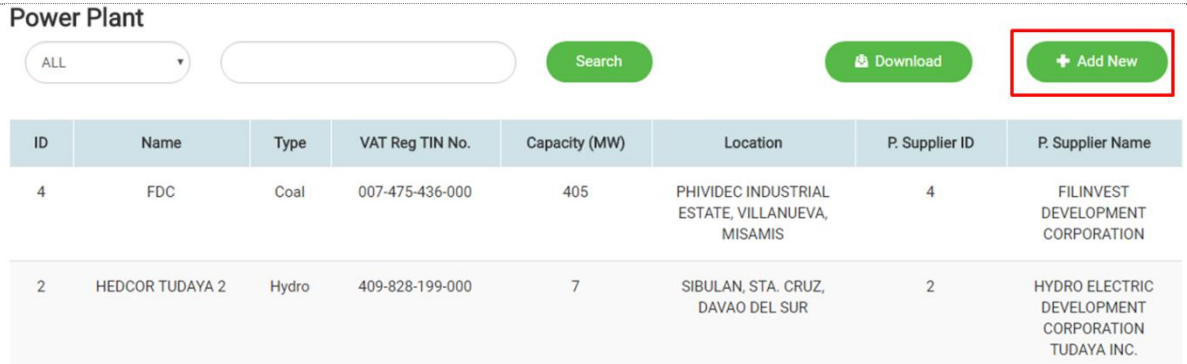
### 4.5.1 Add new Power Plant

1. Click **+ Add New** button in the Power Plant screen.





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2. Fill-out the fields in the *Power Plant/Add New* screen.

   Fields with asterisk are required.

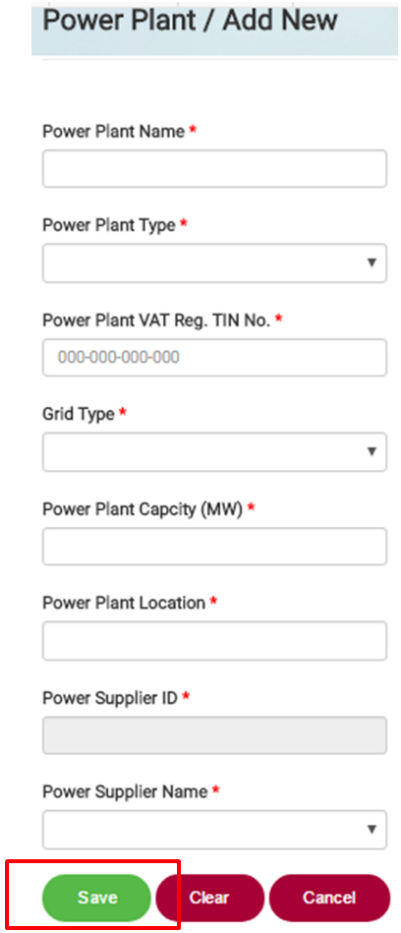
3. Select value from dropdown list (if applicable).

   Power Supplier ID is auto-populated based on Power Supplier Name.

   Note: Adding a new Power Plant requires an existing Power Supplier.

4. Click **Save** button to save the new Power Supplier record.

   Clicking **Clear** button will reset previously selected/entered values.





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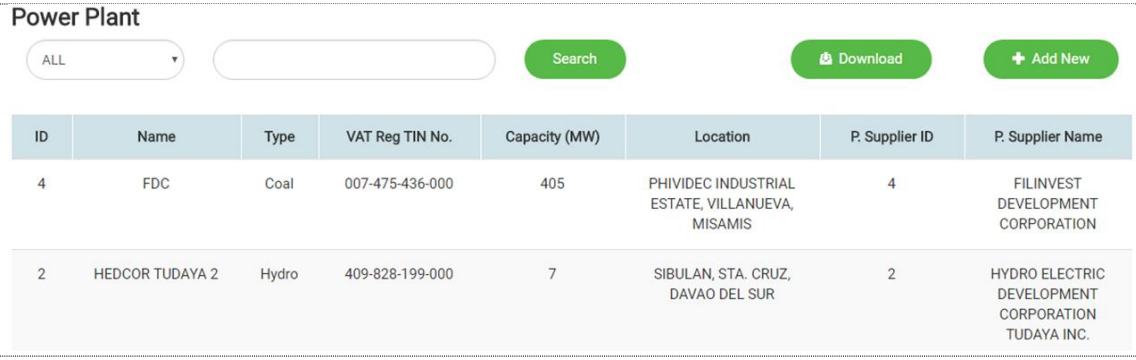
| | |
|---|---|
| 5. System will display a prompt.<br>6. Click **OK** button on the prompt. | |
| 7. System will revert back to the Power Plant list screen. |  |

| ID | Name | Type | VAT Reg TIN No. | Capacity (MW) | Location | P. Supplier ID | P. Supplier Name |
|---|---|---|---|---|---|---|---|
| 4 | FDC | Coal | 007-475-436-000 | 405 | PHIVIDEC INDUSTRIAL ESTATE, VILLANUEVA, MISAMIS | 4 | FILINVEST DEVELOPMENT CORPORATION |
| 2 | HEDCOR TUDAYA 2 | Hydro | 409-828-199-000 | 7 | SIBULAN, STA. CRUZ, DAVAO DEL SUR | 2 | HYDRO ELECTRIC DEVELOPMENT CORPORATION TUDAYA INC. |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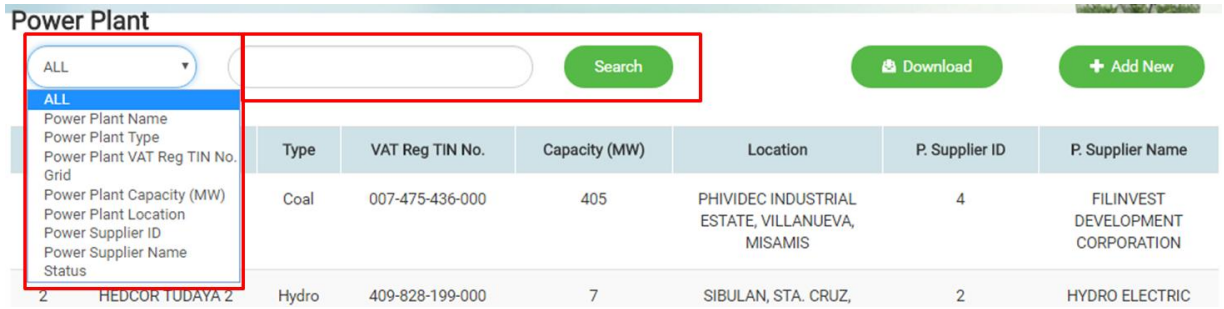
### 4.5.2 Search a Power Plant

1. From the *Power Plant* search screen, select Filter.
   - ALL
   - By Power Plant Name, Power Plant Type, etc.
2. Enter keyword.
3. Click **Search** button.

Click **Previous** or **Next** button to view search results in other pages.





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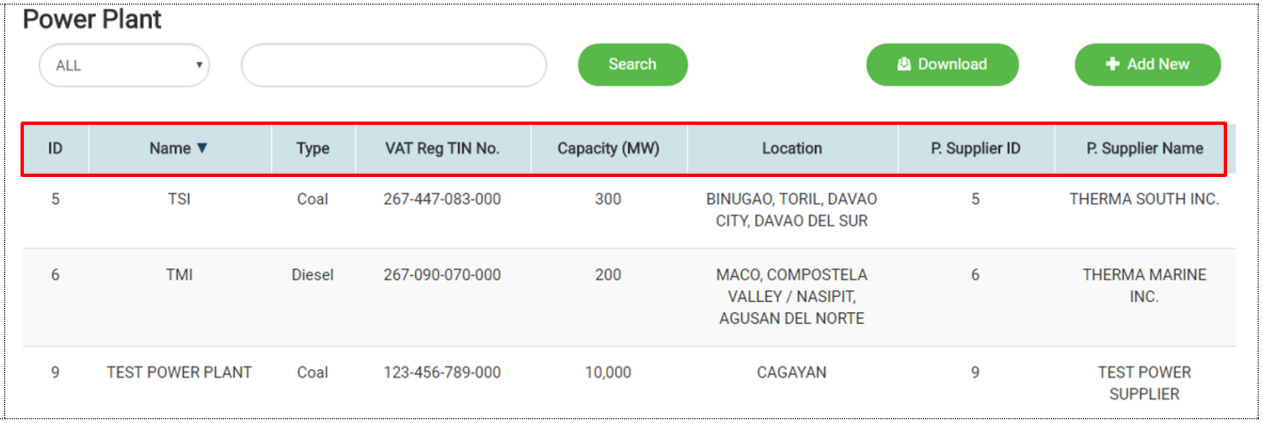
### 4.5.3 Sort Search Results

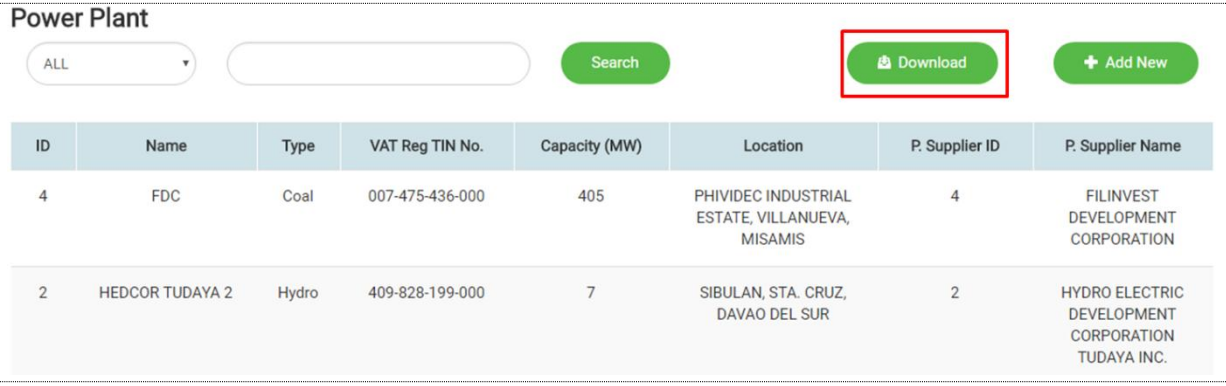
1. From the *Power Plant* list screen, click a column header to sort list.
    a. ID, Name, Type, etc.

Sorting rearranges the entries alphabetically A-Z or Z-A. Click to sort again in the reverse order.




### 4.5.4 Download Power Plant List

1. From the *Power Plant* list screen, click the **Download** button.





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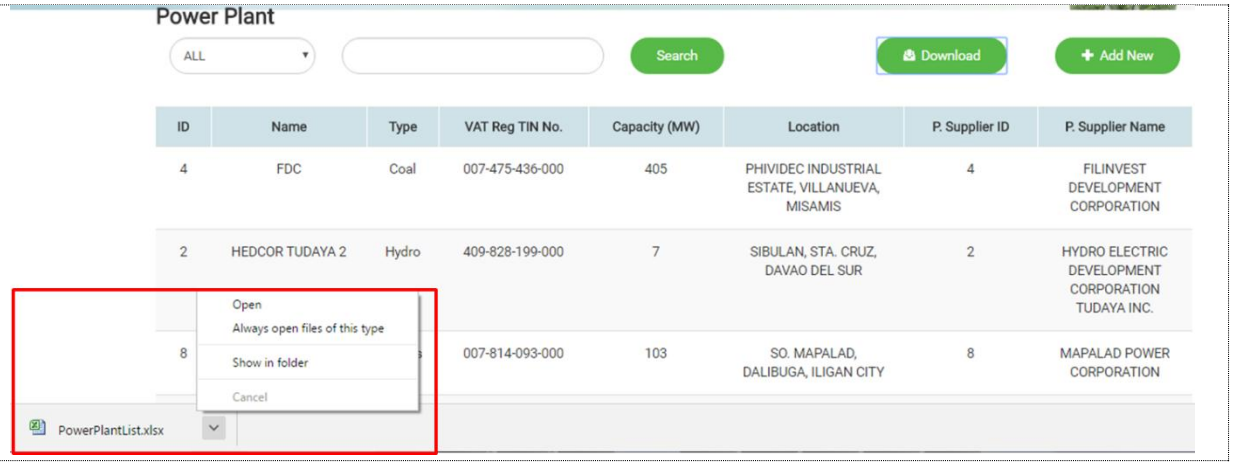
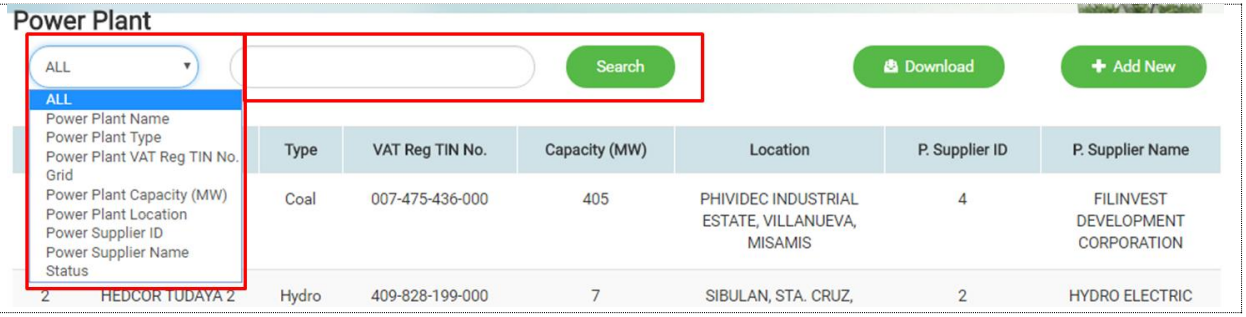
2. Power Plant list will be downloaded in an excel format.

3. Click the file to open and save in computer.




### 4.5.5 View Power Plant

1. From the *Power Plant* list screen, search the Power Plant to be viewed.





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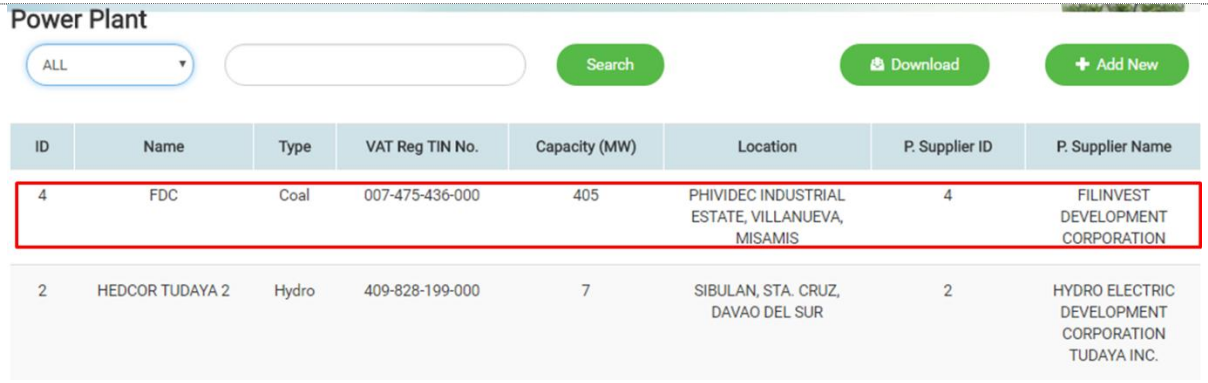
2. Click desired Power Plant to be viewed.





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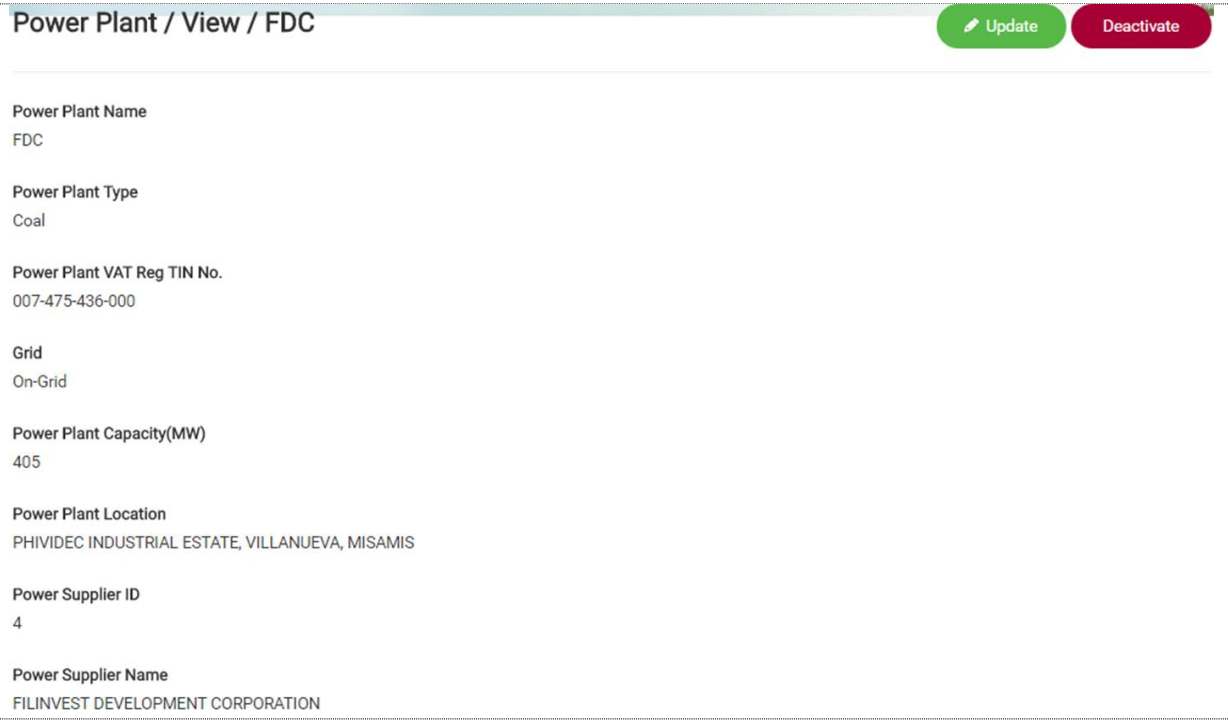
3. System will display the *Power Plant* details page.





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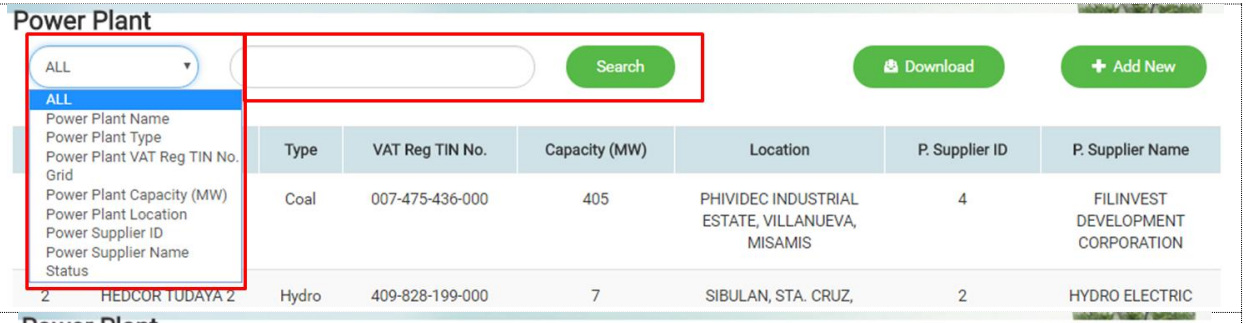
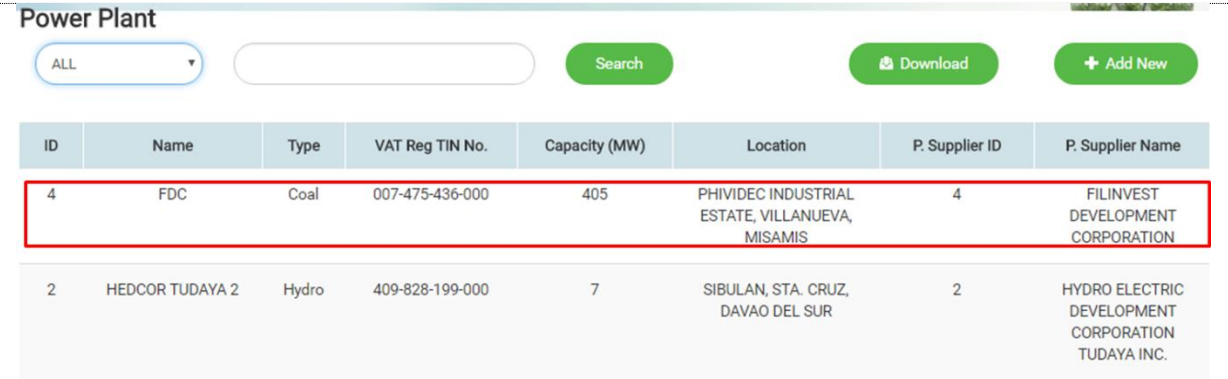
### 4.5.6 Update Power Plant

1. From the *Power Plant* list screen, search the Power Plant to be updated.




2. Click desired Power Plant to be updated.





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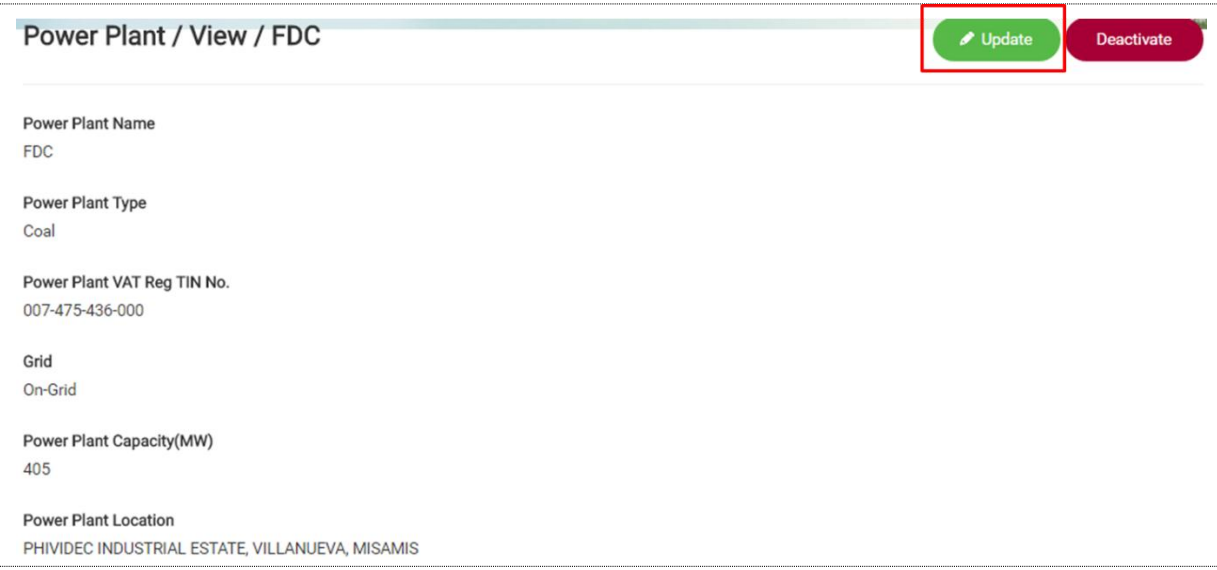
3. System will display the *Power Plant* details page.

4. Click **Update** button.





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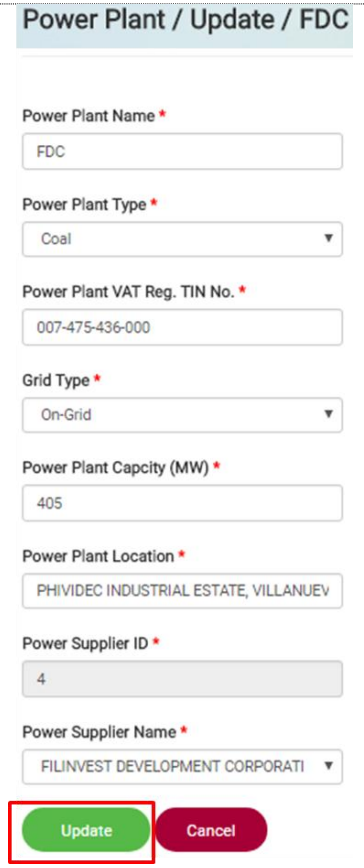
5. System will display the *Power Plant/Update* details page.

6. Update Power Plant details.

7. Click **Update** button.





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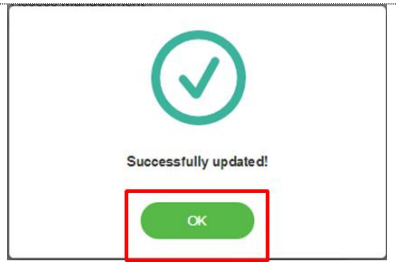
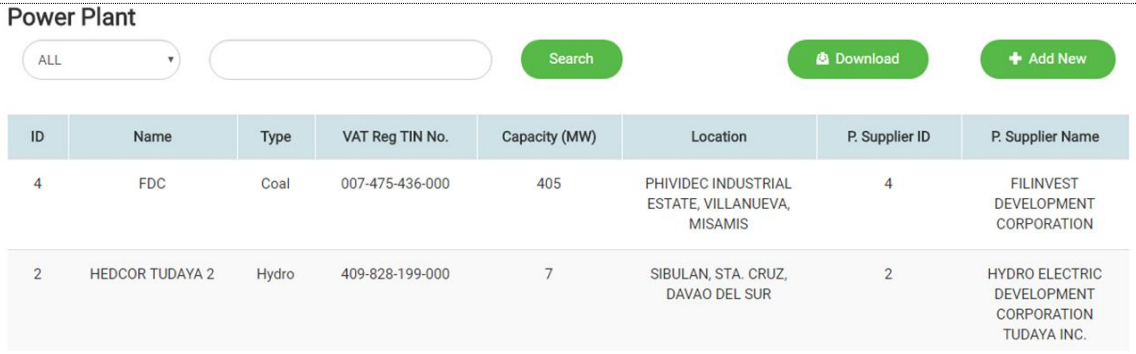
8. System will display a prompt.

9. Click **OK** button.




10. System will revert back to the *Power Plant* list screen.




| ID | Name | Type | VAT Reg TIN No. | Capacity (MW) | Location | P. Supplier ID | P. Supplier Name |
|---|---|---|---|---|---|---|---|
| 4 | FDC | Coal | 007-475-436-000 | 405 | PHIVIDEC INDUSTRIAL ESTATE, VILLANUEVA, MISAMIS | 4 | FILINVEST DEVELOPMENT CORPORATION |
| 2 | HEDCOR TUDAYA 2 | Hydro | 409-828-199-000 | 7 | SIBULAN, STA. CRUZ, DAVAO DEL SUR | 2 | HYDRO ELECTRIC DEVELOPMENT CORPORATION TUDAYA INC. |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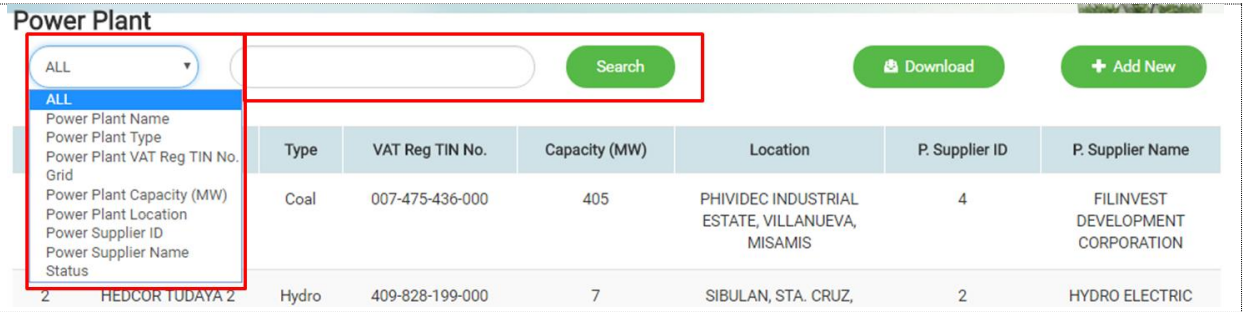
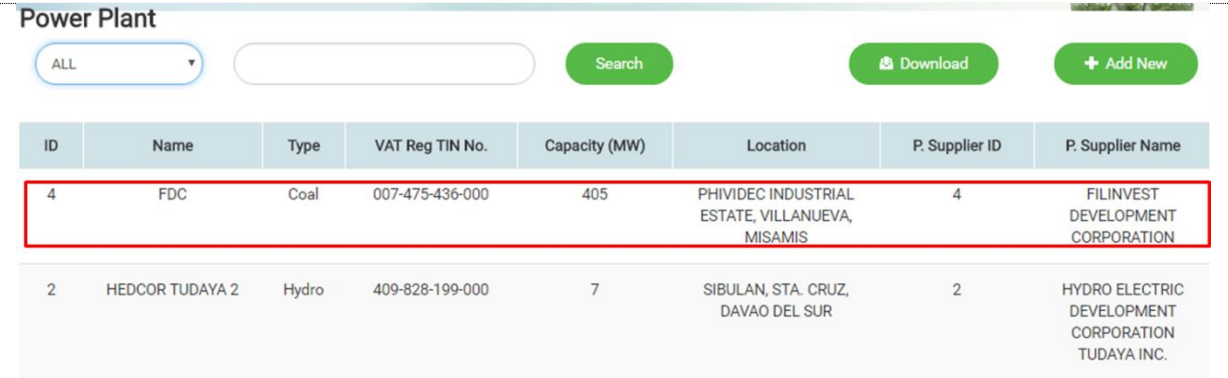
### 4.5.7 Deactivate Power Plant

1. From the *Power Plant* list screen, search the Power Plant to be deactivated.




2. Click desired Power Plant to be deactivated.





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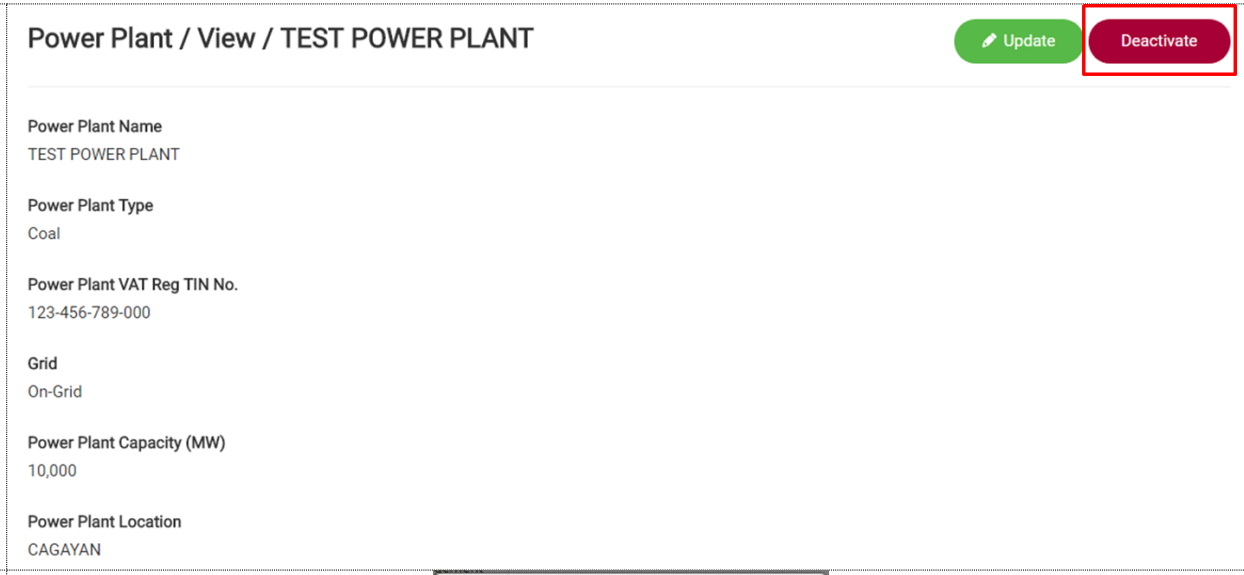
| | |
|---|---|
| 3. System will display the *Power Plant* details page.<br><br>4. Click **Deactivate** button. |  |
| 5. System will display a confirmation prompt.<br><br>6. Click **Yes** button to confirm deactivation. | |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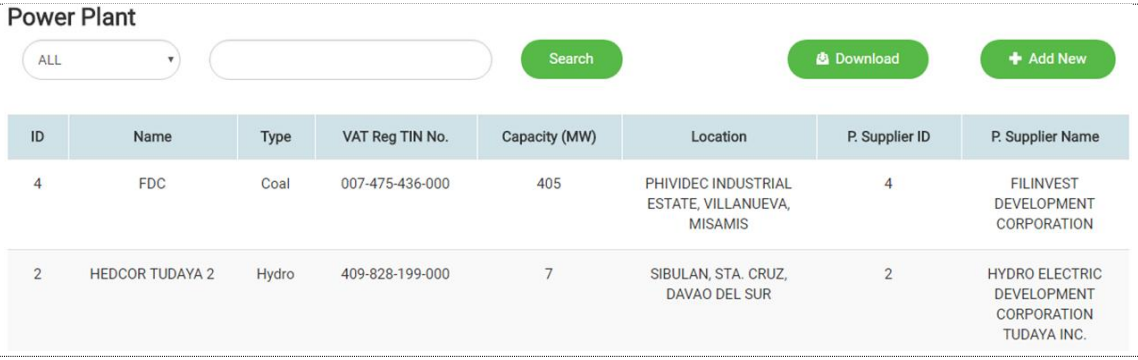
| | |
|---|---|
| 7. System will display a prompt.<br>8. Click **OK** button. | |
| 9. System will revert back to the Power Plant list screen. |  |

| ID | Name | Type | VAT Reg TIN No. | Capacity (MW) | Location | P. Supplier ID | P. Supplier Name |
|---|---|---|---|---|---|---|---|
| 4 | FDC | Coal | 007-475-436-000 | 405 | PHIVIDEC INDUSTRIAL ESTATE, VILLANUEVA, MISAMIS | 4 | FILINVEST DEVELOPMENT CORPORATION |
| 2 | HEDCOR TUDAYA 2 | Hydro | 409-828-199-000 | 7 | SIBULAN, STA. CRUZ, DAVAO DEL SUR | 2 | HYDRO ELECTRIC DEVELOPMENT CORPORATION TUDAYA INC. |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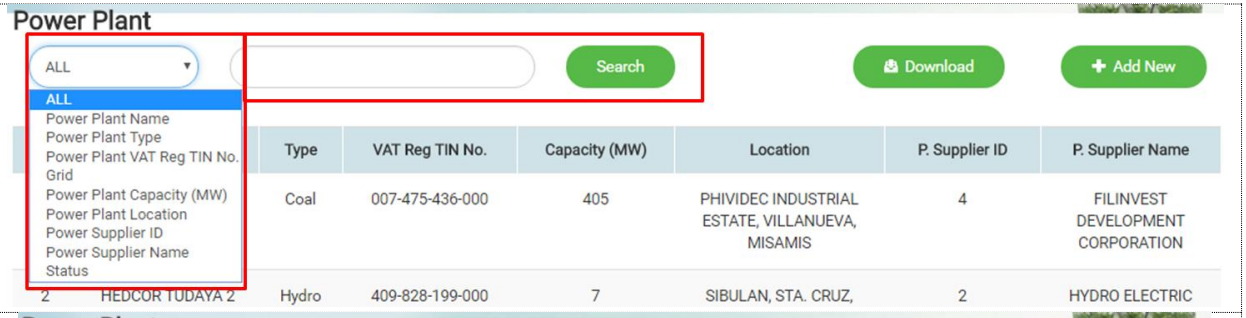
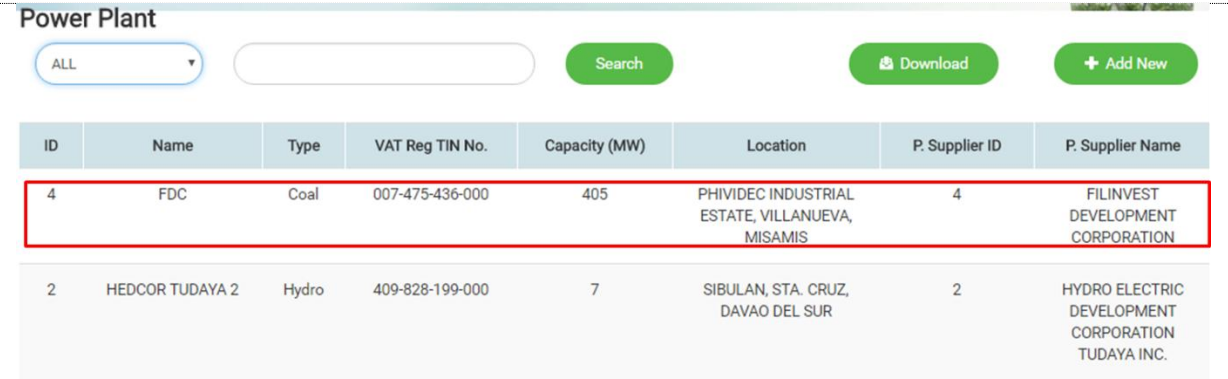
### 4.5.8 Activate Power Plant

1. From the *Power Plant* list screen, search the Power Plant to be activated.




2. Click desired Power Plant to be activated.





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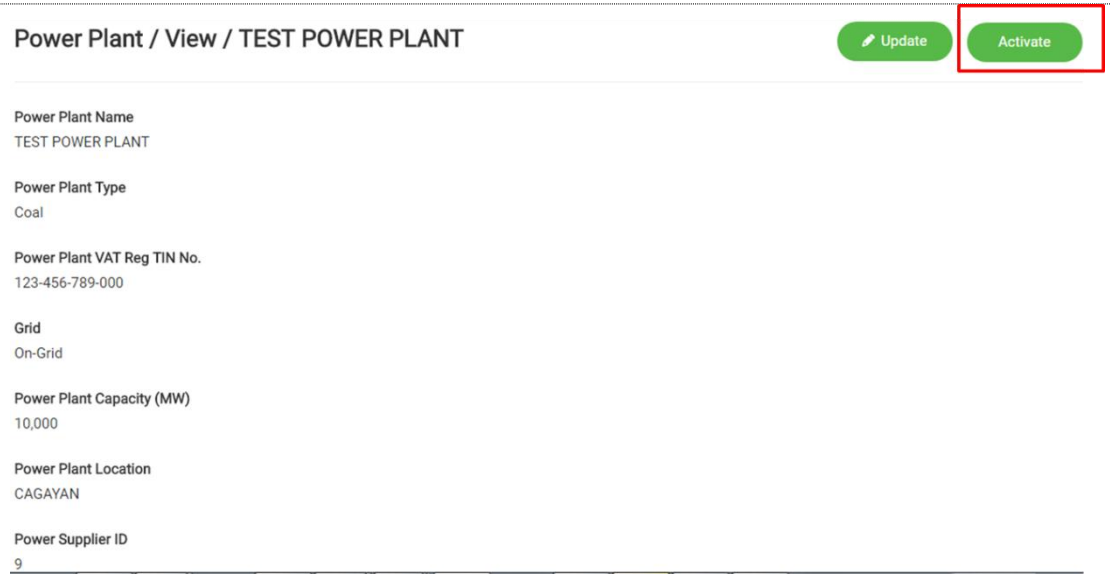
| | |
|---|---|
| 3. System will display the *Power Plant* details page.<br><br>4. Click **Activate** button. |  |
| 5. System will display a confirmation prompt.<br><br>6. Click **Yes** button to confirm activation. | |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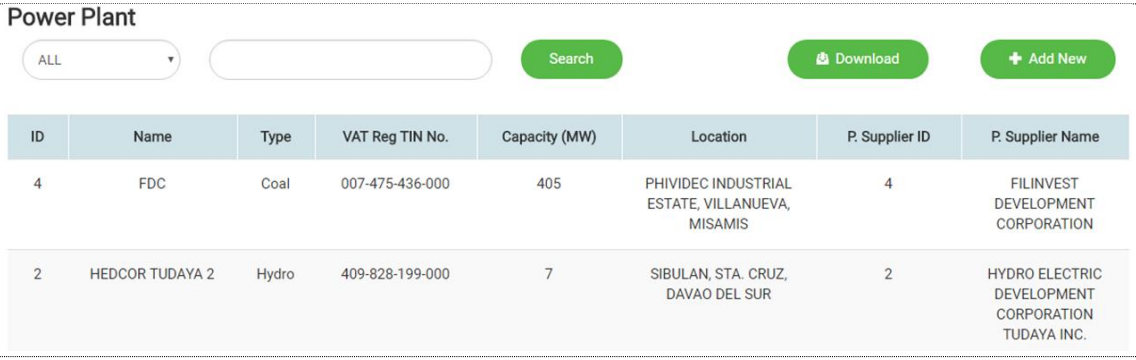
| | |
|---|---|
| 7. System will display a prompt.<br>8. Click **OK** button. | |
| 9. System will revert back to the Power Plant list screen. |  |

| ID | Name | Type | VAT Reg TIN No. | Capacity (MW) | Location | P. Supplier ID | P. Supplier Name |
|---|---|---|---|---|---|---|---|
| 4 | FDC | Coal | 007-475-436-000 | 405 | PHIVIDEC INDUSTRIAL ESTATE, VILLANUEVA, MISAMIS | 4 | FILINVEST DEVELOPMENT CORPORATION |
| 2 | HEDCOR TUDAYA 2 | Hydro | 409-828-199-000 | 7 | SIBULAN, STA. CRUZ, DAVAO DEL SUR | 2 | HYDRO ELECTRIC DEVELOPMENT CORPORATION TUDAYA INC. |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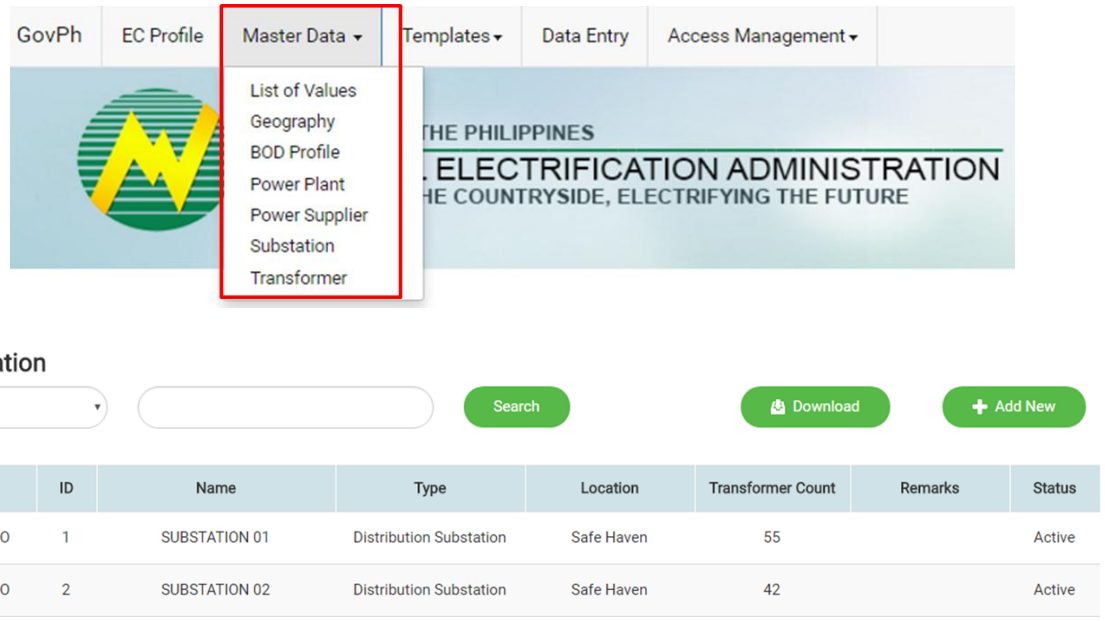
## 4.6 Substation Submenu

1. Select **Master Data > Substation** from the Menu tab.

2. *Substation* list will be displayed.





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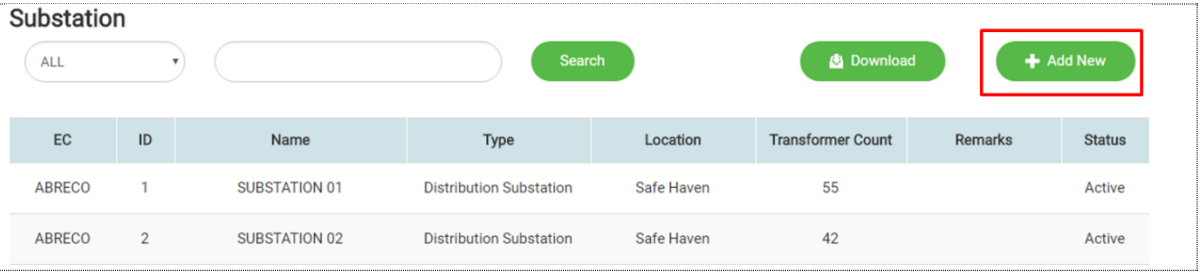
### 4.6.1 Add new Substation

1. Click **+ Add New** button in the Substation list screen.





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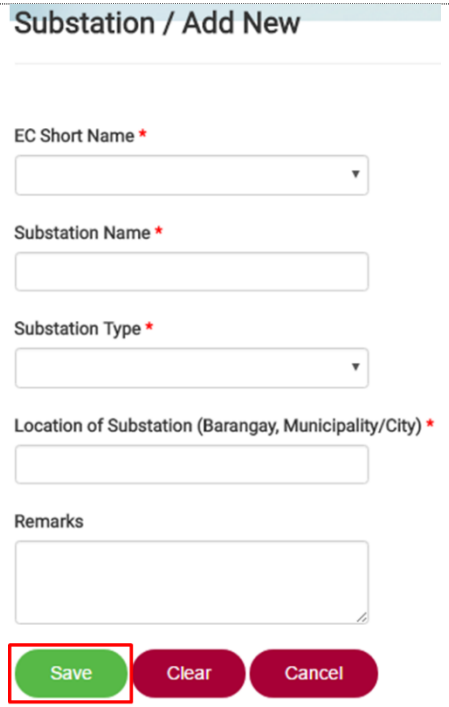
| | |
|---|---|
| 2. Fill-out the fields in the *Substation/Add New* screen.<br><br>Fields with asterisk are required.<br><br>3. Select value from dropdown list (if applicable).<br><br>4. Click **Save** button to save the new Power Supplier record.<br><br>Clicking **Clear** button will reset previously selected/entered values. |  |
| 5. System will display a prompt.<br><br>6. Click **OK** button on the prompt. | |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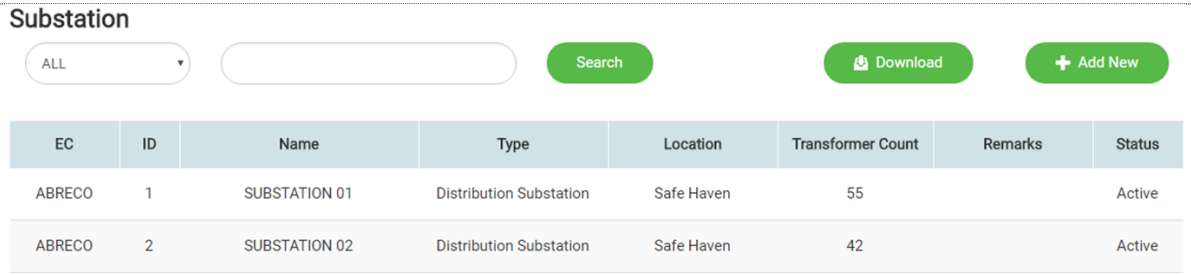
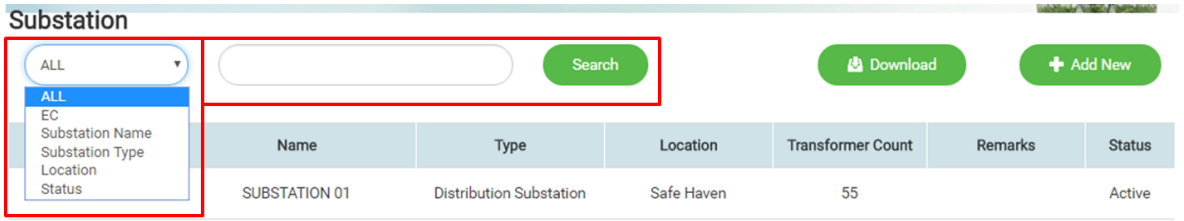
7. System will revert back to the Substation list screen.




### 4.6.2 Search a Substation

1. From the *Substation* search screen, select Filter.
   - ALL
   - By EC, Substation Name, Substation Type, etc.
2. Enter keyword.
3. Click **Search** button.





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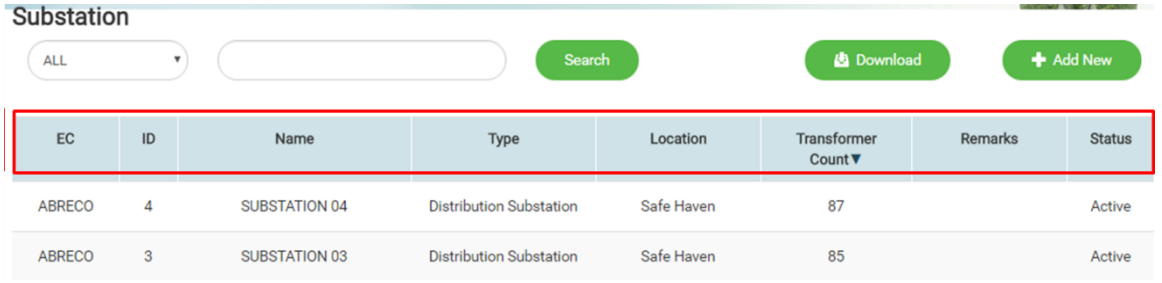
### 4.6.3 Sort Search Results

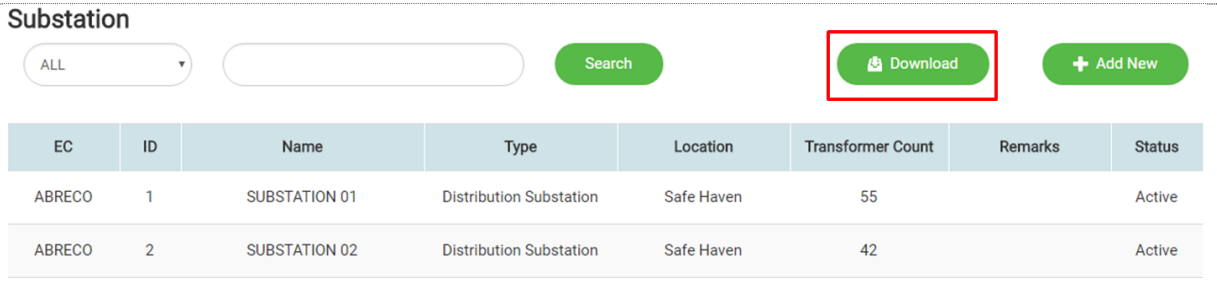
1. From the *Substation* list screen, click a column header to sort list.
    - EC, ID, Name, etc.

Sorting rearranges the entries alphabetically A-Z or Z-A. Click to sort again in the reverse order.




### 4.6.4 Download Substation List

1. From the *Substation* list screen, click the **Download** button.





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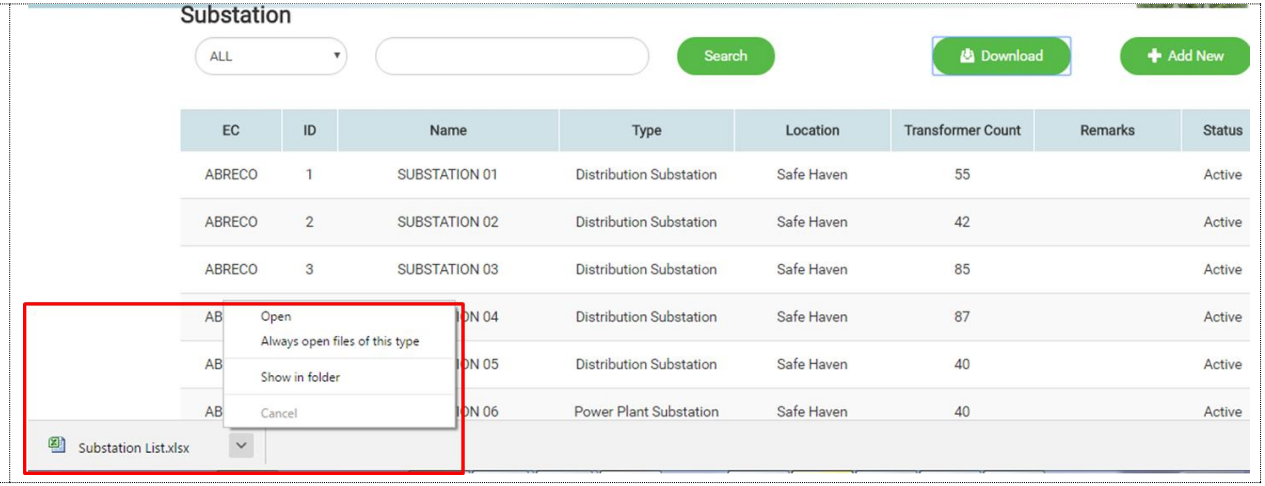
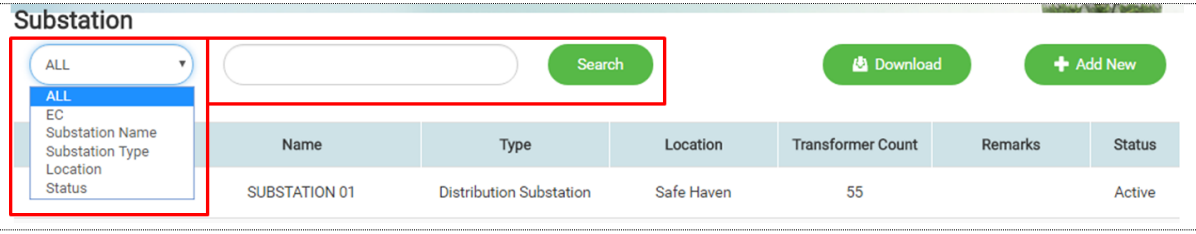
2. Substation list will be downloaded in an excel format.

3. Click the file to open and save in computer.




### 4.6.5 View Substation

1. From the *Substation* list screen, search the Substation to be viewed.





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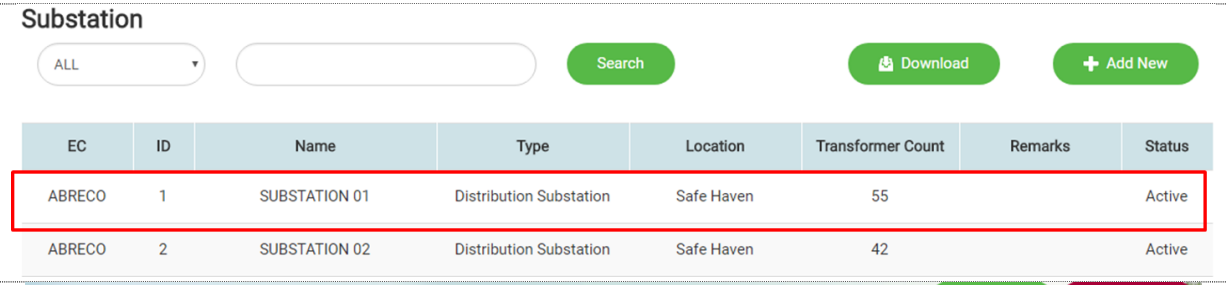
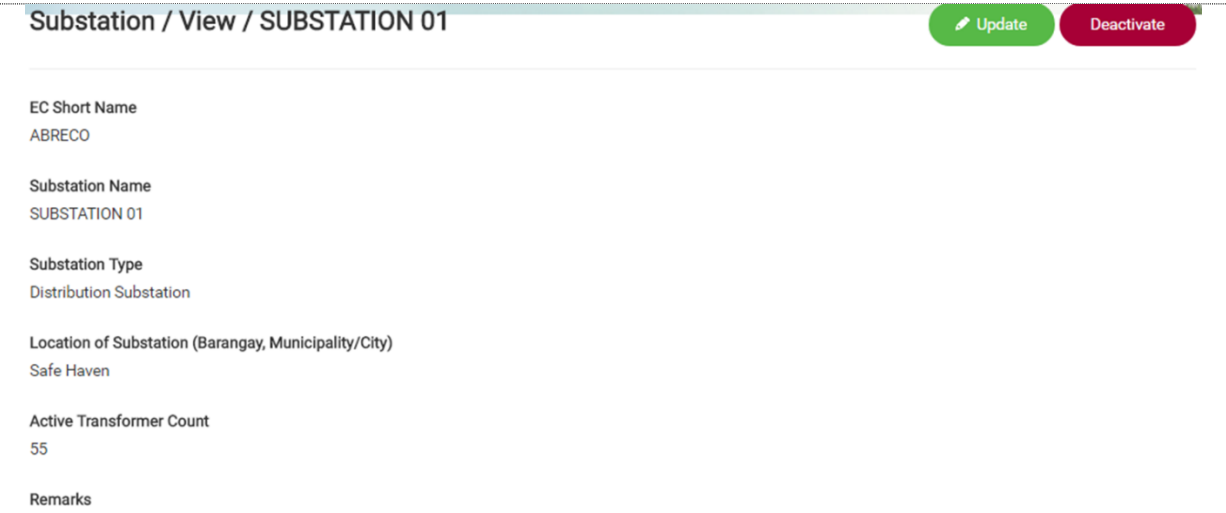
| | |
|---|---|
| 2. Click desired Substation to be viewed. |  |
| 3. System will display the *Substation* details page. |  |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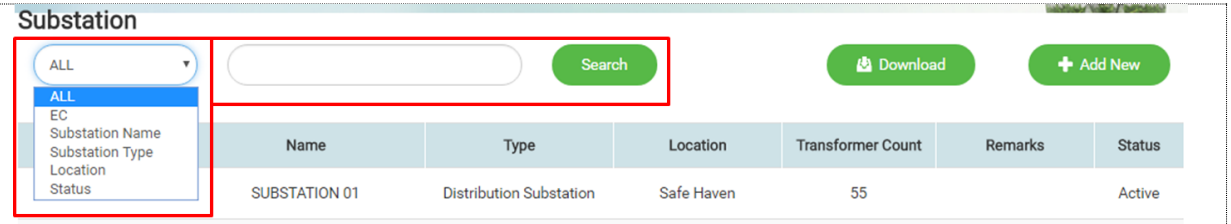
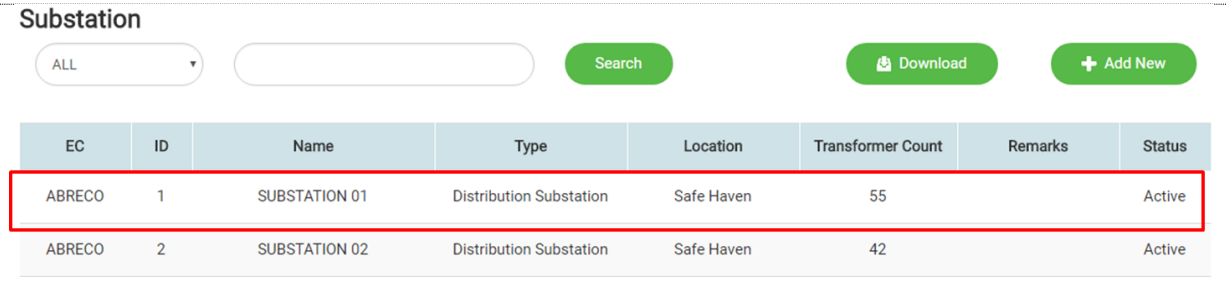
### 4.6.6 Update Substation

| | |
|---|---|
| 1. From the *Substation* list screen, search the Substation to be updated. |  |
| 2. Click desired Substation to be updated. |  |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| | |
|---|---|
| 3. System will display the *Substation* details page.<br><br>4. Click **Update** button. | |


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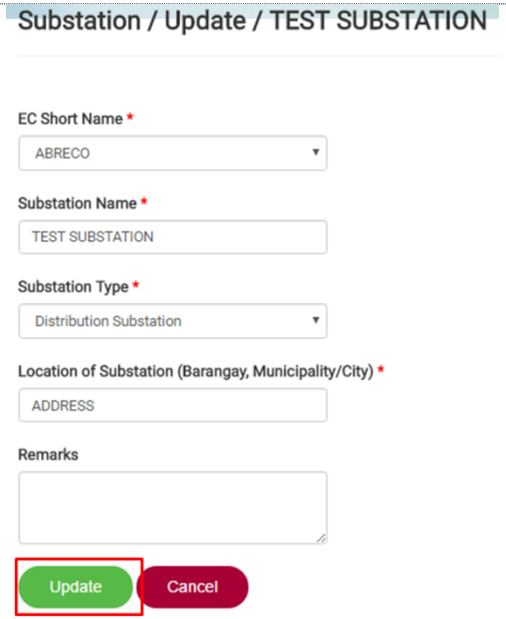
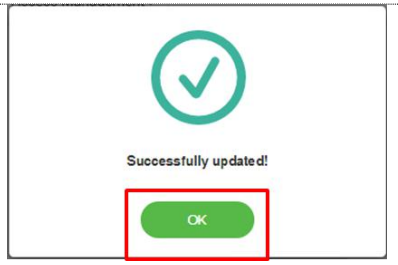
| | |
|---|---|
| 5. System will display the *Substation/Update* details page.<br><br>6. Update Substation details.<br><br>7. Click **Update** button. |  |
| 8. System will display a prompt.<br><br>9. Click **OK** button. |  |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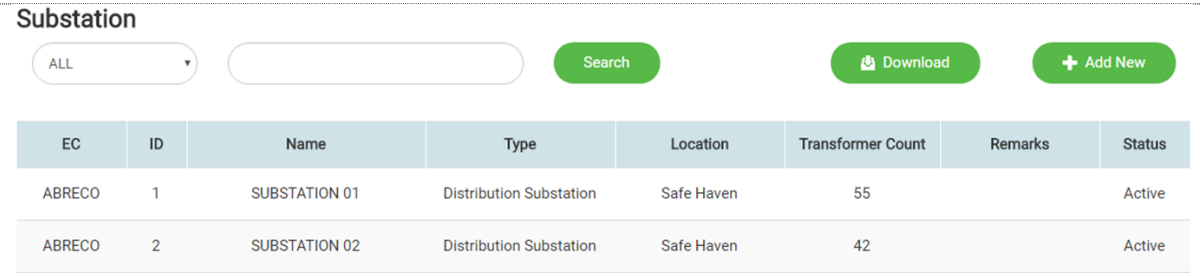
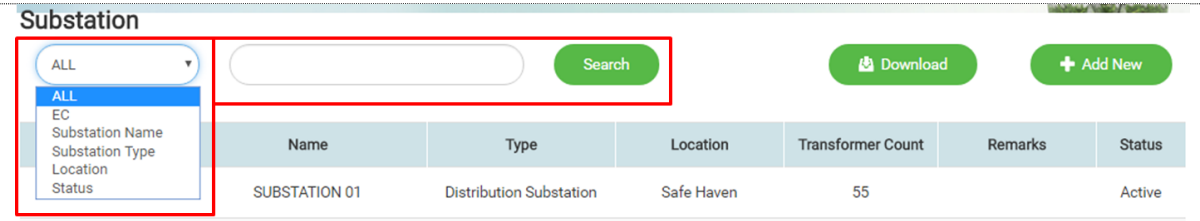
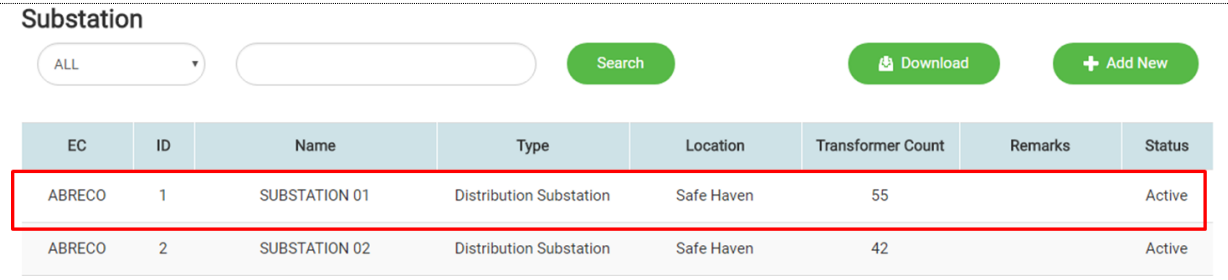
| | |
|---|---|
| 10. System will revert back to the *Substation* list screen. |  |



### 4.6.7 Deactivate Substation

| | |
|---|---|
| 1. From the *Substation* list screen, search the Substation to be deactivated. |  |
| 2. Click desired Substation to be deactivated. |  |



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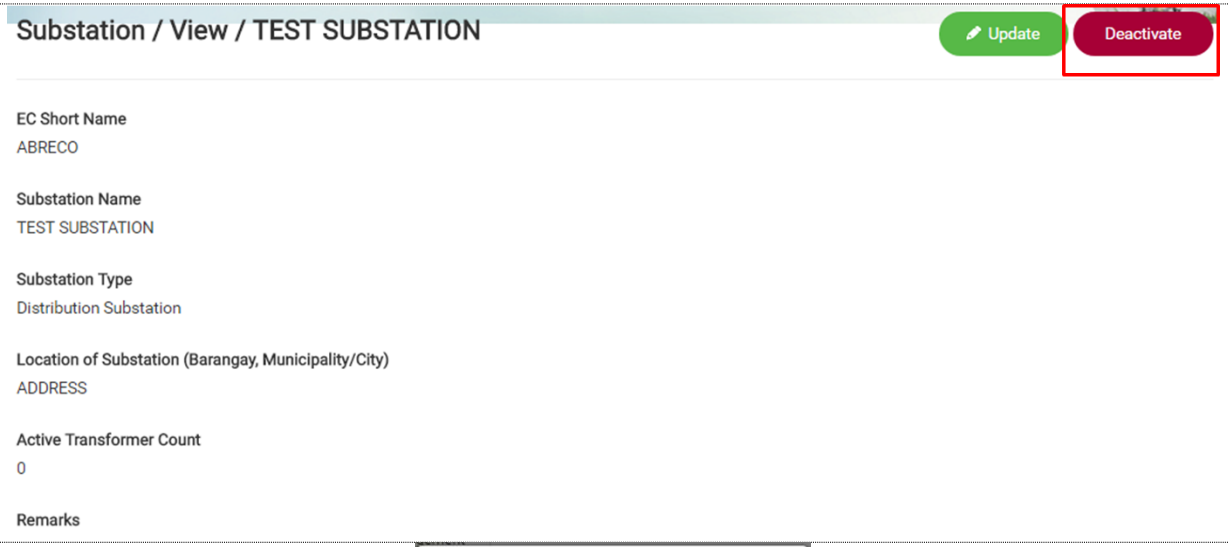
| | |
|---|---|
| 3. System will display the *Substation* details page.<br><br>4. Click **Deactivate** button. |  |
| 5. System will display a confirmation prompt.<br><br>6. Click **Yes** button to confirm deactivation. | |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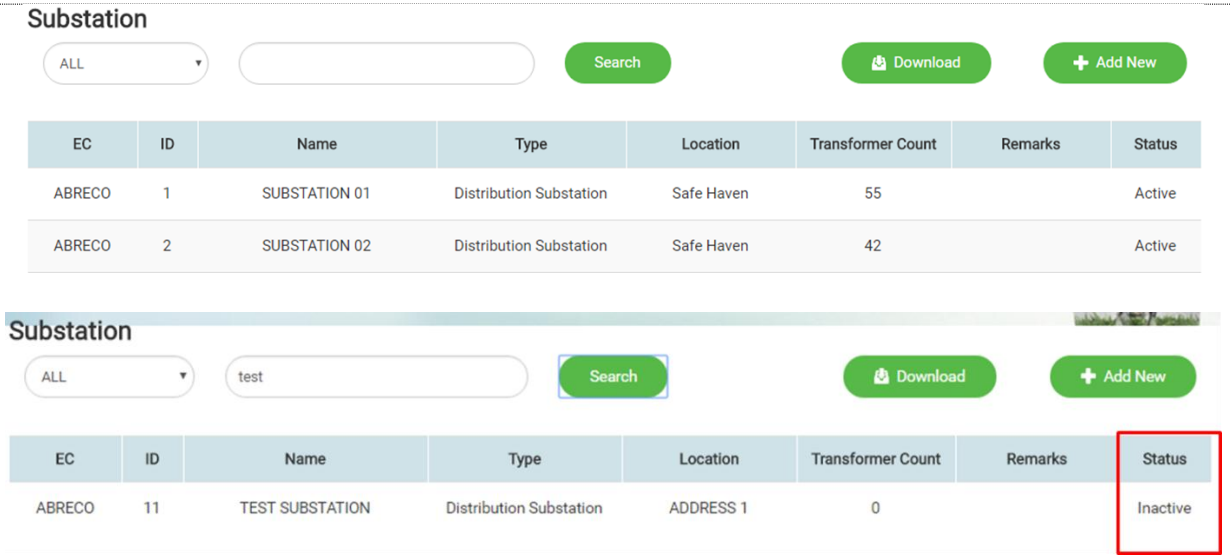
7. System will display a prompt.
8. Click **OK** button.

9. System will revert back to the Substation list screen.

When Substation is checked, status becomes Inactive.





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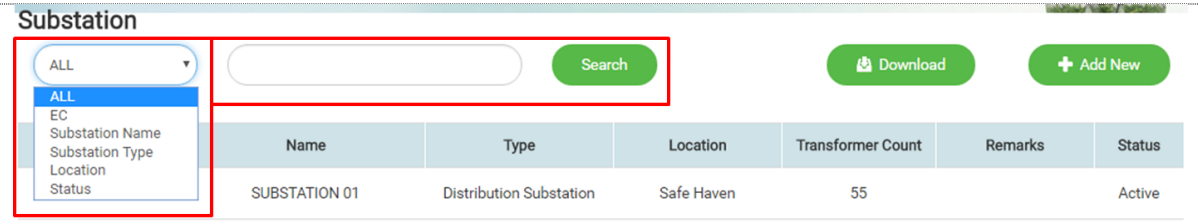
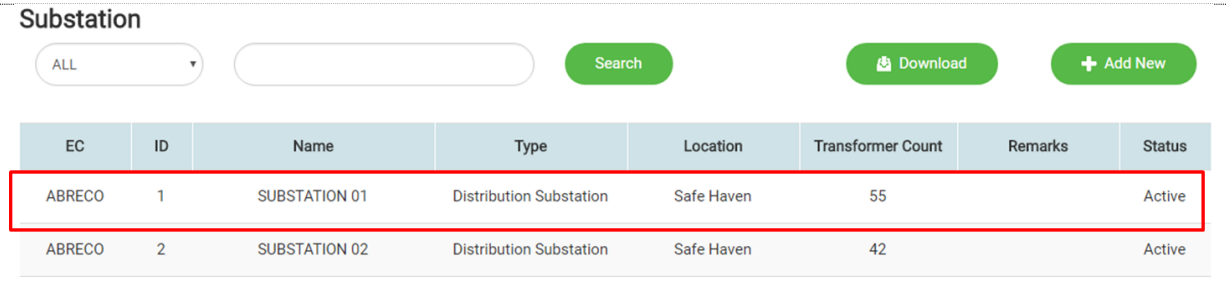
### 4.6.8 Activate Substation

| | |
|---|---|
| 1. From the *Substation* list screen, search the Substation to be activated. |  |
| 2. Click desired Substation to be activated. |  |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| | |
|---|---|
| 3. System will display the *Substation* details page.<br><br>4. Click **Activate** button. | |
| 5. System will display a confirmation prompt.<br><br>6. Click **Yes** button to confirm activation. | |
| 7. System will display a prompt.<br><br>8. Click **OK** button. | |


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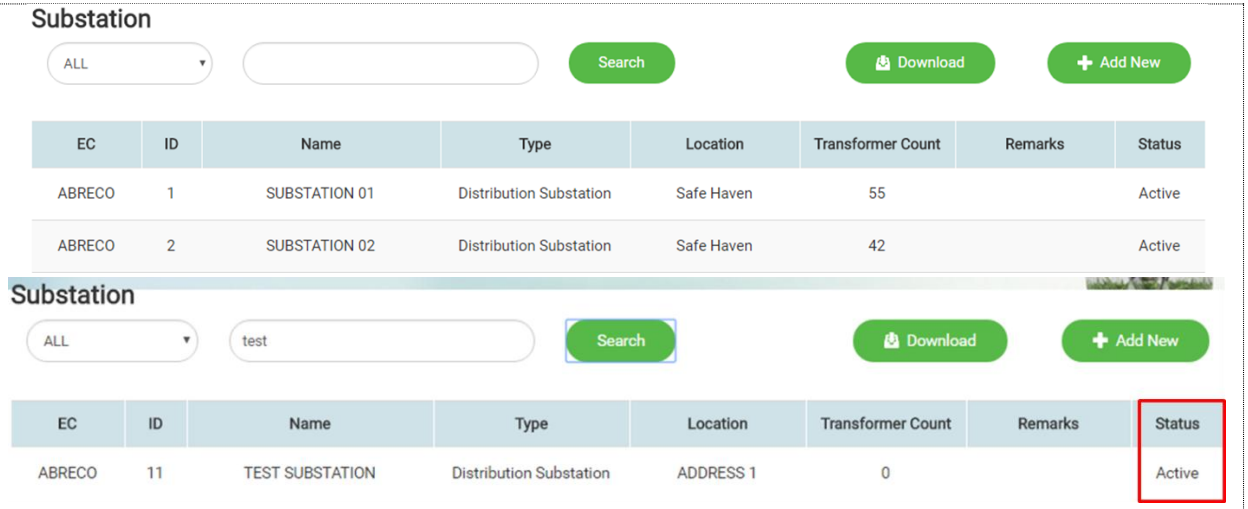
9. System will revert back to the Substation list screen.

When Substation is checked, status becomes Active.





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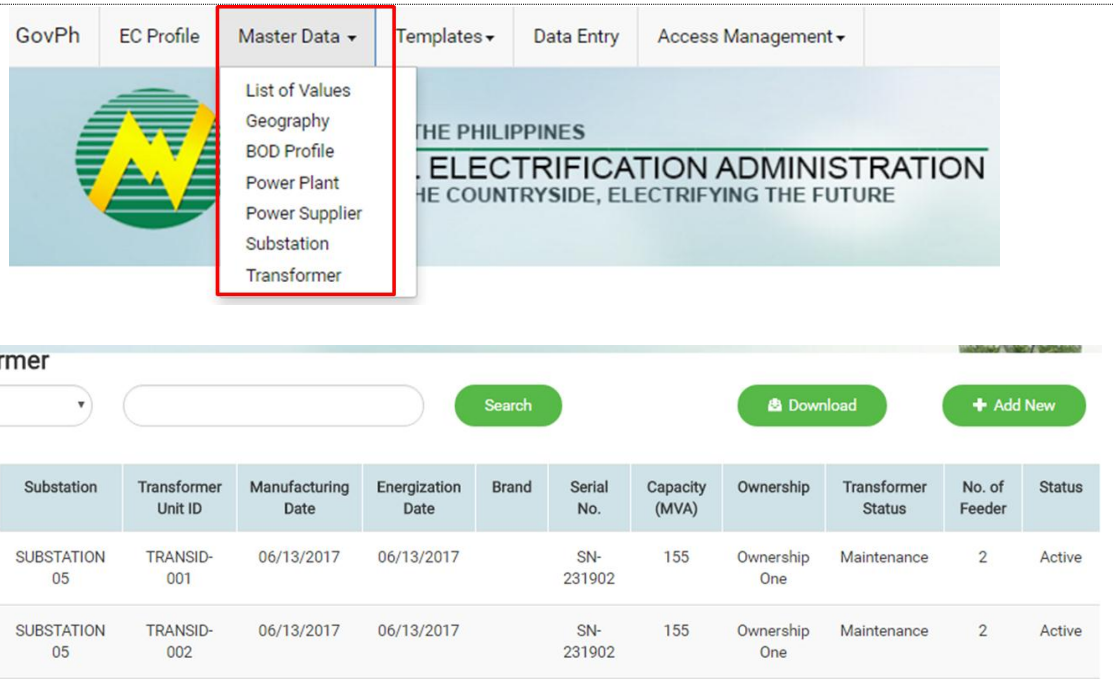
## 4.7 Transformer Submenu

1. Select **Master Data > Transformer** from the Menu tab.

2. *Transformer* list will be displayed.





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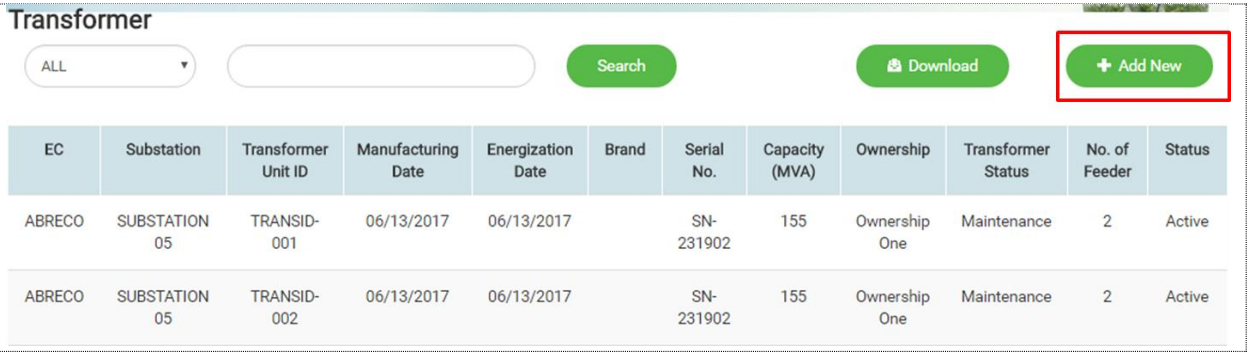
### 4.7.1 Add new Transformer

1. Click **+ Add New** button in the Transformer list screen.




| EC | Substation | Transformer Unit ID | Manufacturing Date | Energization Date | Brand | Serial No. | Capacity (MVA) | Ownership | Transformer Status | No. of Feeder | Status |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ABRECO | SUBSTATION 05 | TRANSID-001 | 06/13/2017 | 06/13/2017 | | SN-231902 | 155 | Ownership One | Maintenance | 2 | Active |
| ABRECO | SUBSTATION 05 | TRANSID-002 | 06/13/2017 | 06/13/2017 | | SN-231902 | 155 | Ownership One | Maintenance | 2 | Active |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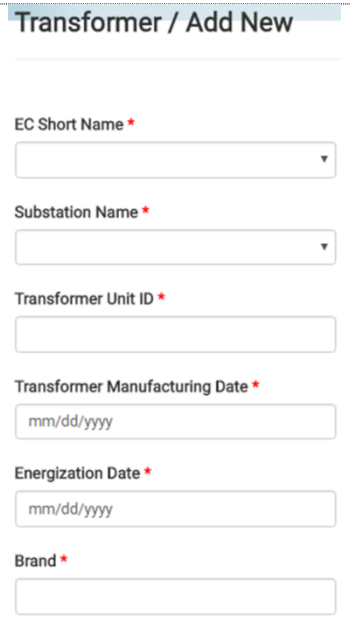
2. Fill-out the fields in the *Transformer/Add New* screen.

   Fields with asterisk are required.

3. Select value from dropdown list (if applicable).





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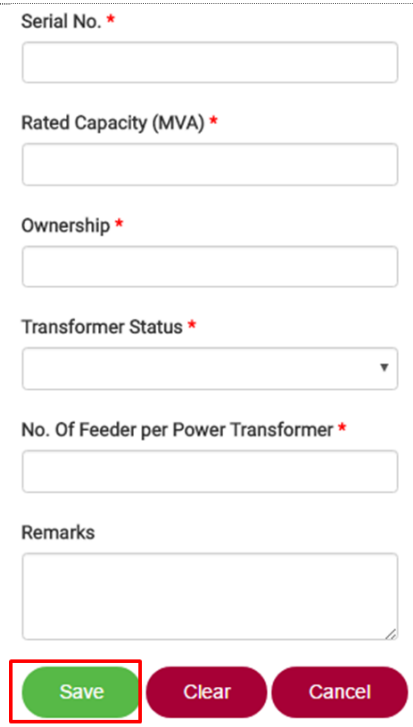
| | |
|---|---|
| 4. Click **Save** button to save the new Transformer record.<br><br>Clicking **Clear** button will reset previously selected/entered values. |  |
| 5. System will display a prompt.<br><br>6. Click **OK** button on the prompt. | |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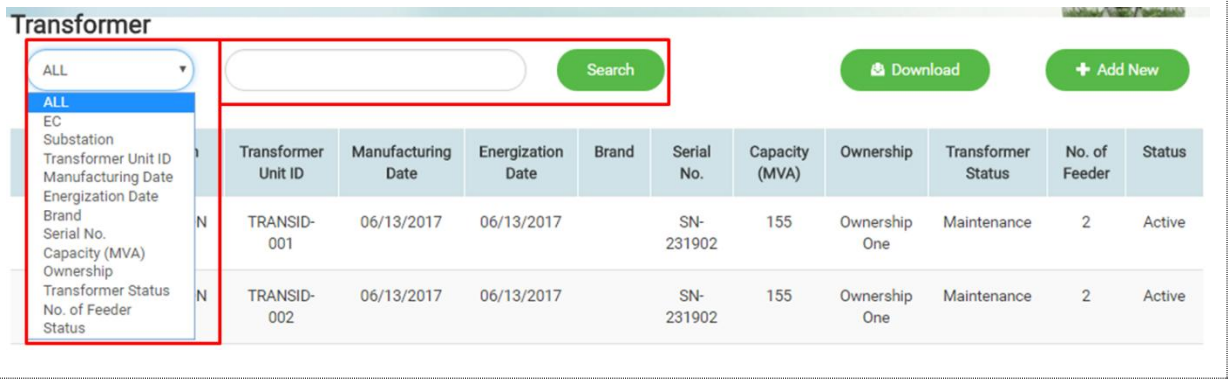
7. System will revert back to the Transformer list screen.

### 4.7.2 Search a Transformer

1. From the *Transformer* search screen, select Filter.
   - ALL
   - By EC, Substation, Transformer Unit ID, etc.
2. Enter keyword.
3. Click **Search** button.





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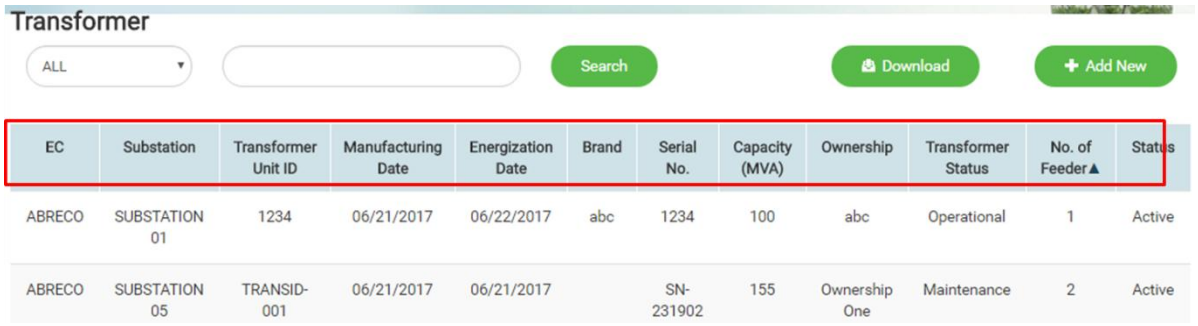
### 4.7.3 Sort Search Results

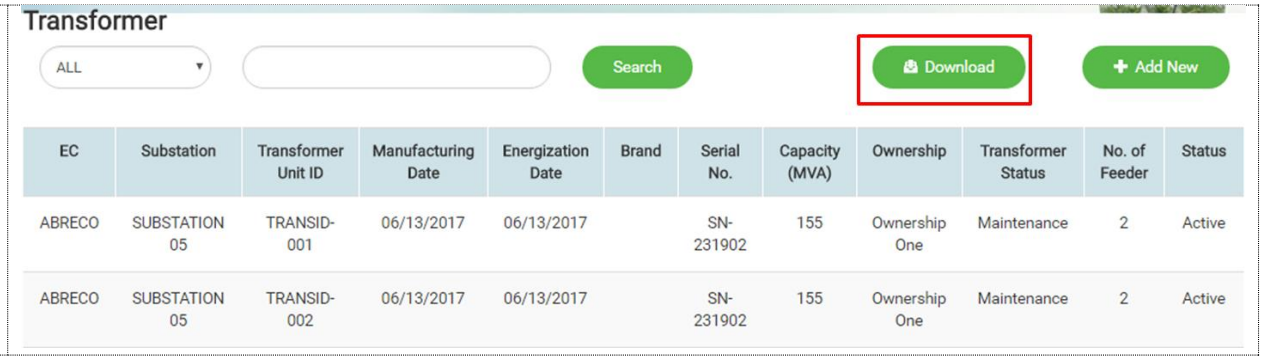
1. From the *Transformer* list screen, click a column header to sort list.
   - EC, Substation, Manufacturing Date, etc.

Sorting rearranges the entries alphabetically A-Z or Z-A. Click to sort again in the reverse order.




### 4.7.4 Download Transformer List

1. From the *Transformer* list screen, click the **Download** button.





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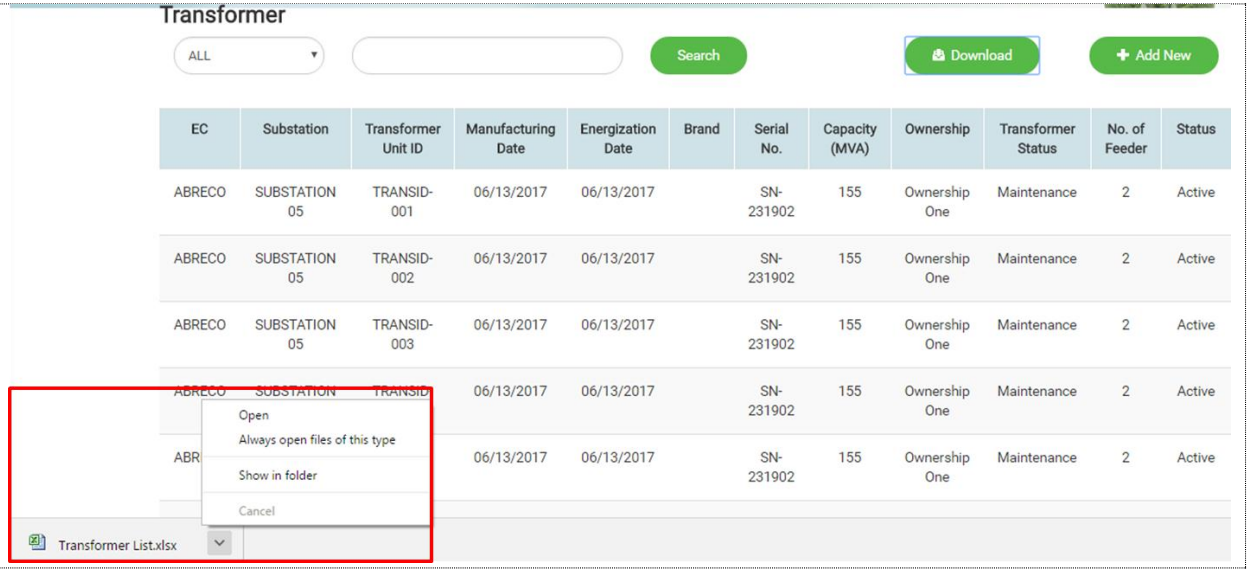
2. Transformer list will be downloaded in an excel format.

3. Click the file to open and save in computer.





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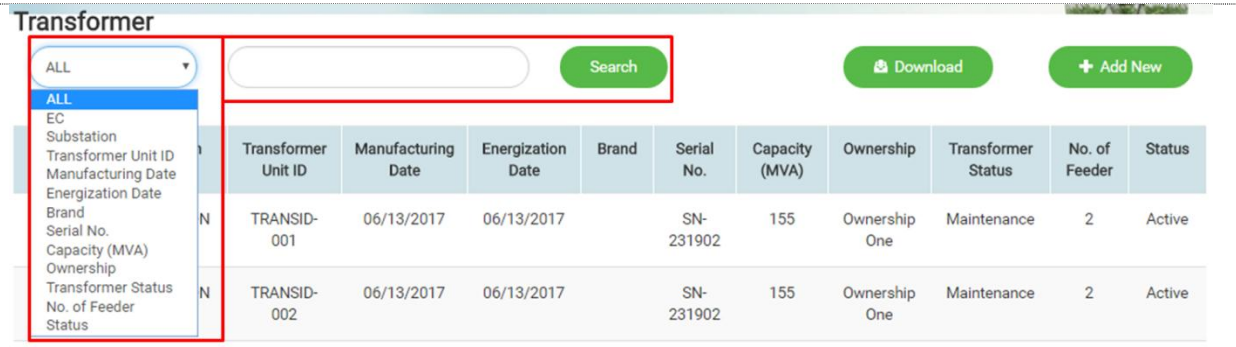
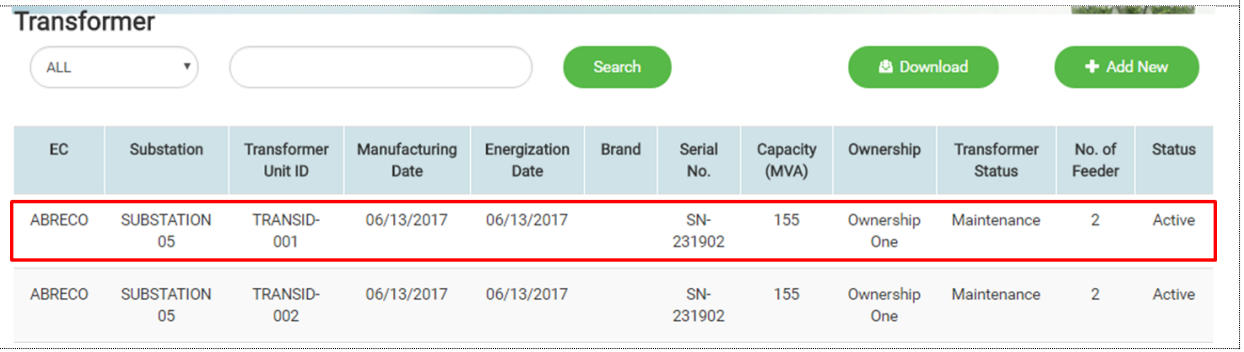
### 4.7.5 View Transformer

| | |
|---|---|
| 1. From the *Transformer* list screen, search the Transformer to be viewed. |  |
| 2. Click desired Transformer to be viewed. |  |



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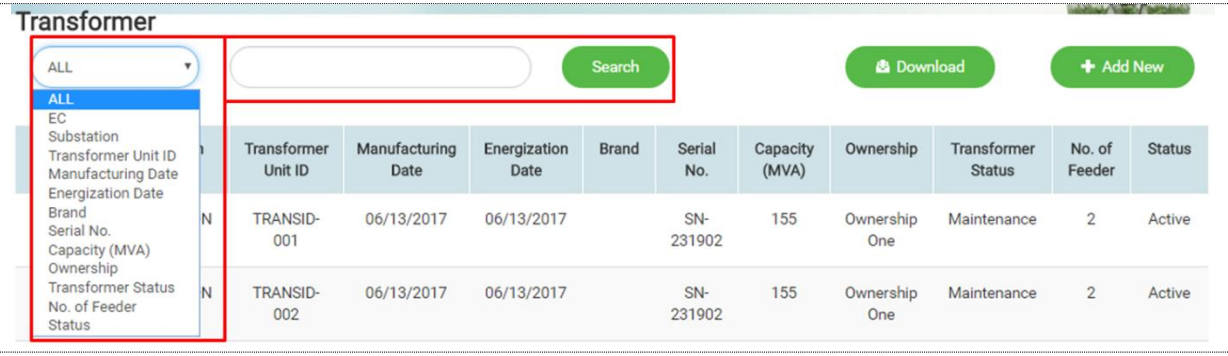
| | |
|---|---|
| 3. System will display the *Transformer* details page. | |

### 4.7.6 Update Transformer

| | |
|---|---|
| 1. From the *Transformer* list screen, search the Transformer to be updated. |  |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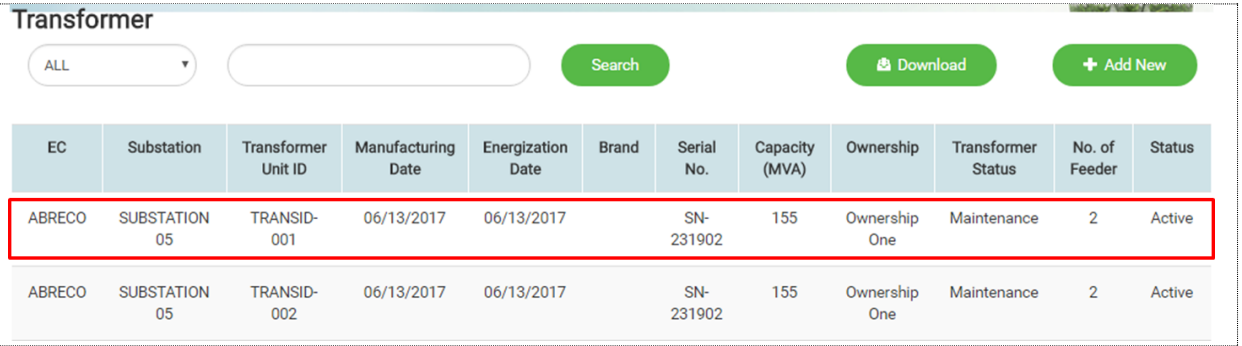
2. Click desired Transformer to be updated.




3. System will display the *Transformer* details page.

4. Click **Update** button.

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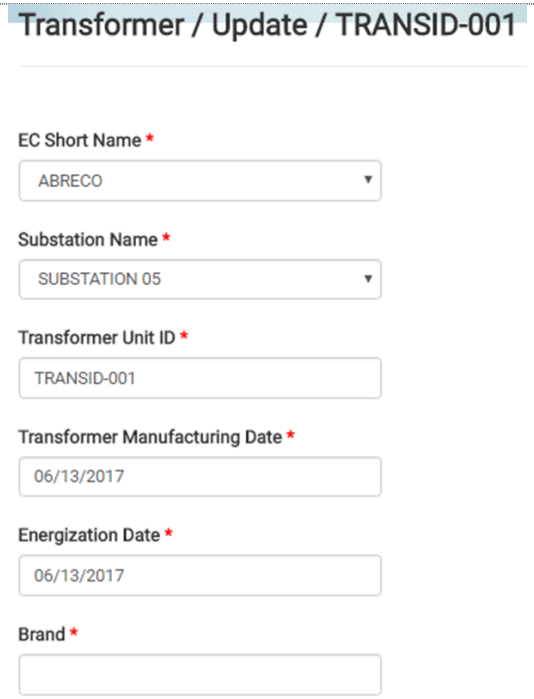
| | |
|---|---|
| 5. System will display the *Transformer/Update* details page.<br><br>6. Update Transformer details. |  |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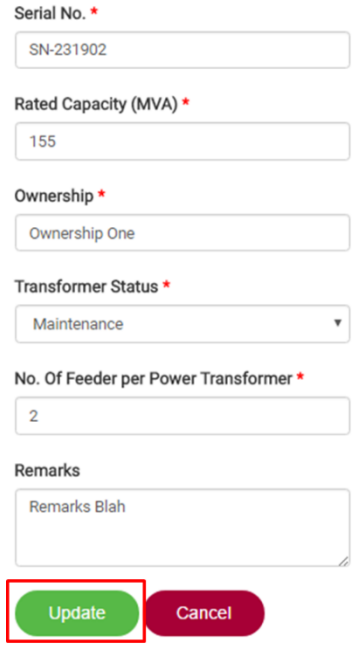
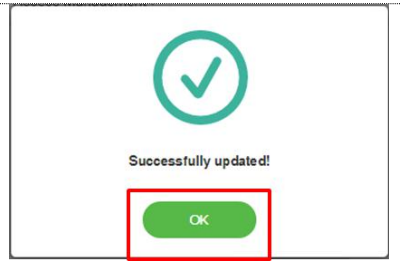
| | |
|---|---|
| 7. Click **Update** button. |  |
| 8. System will display a prompt.<br>9. Click **OK** button. |  |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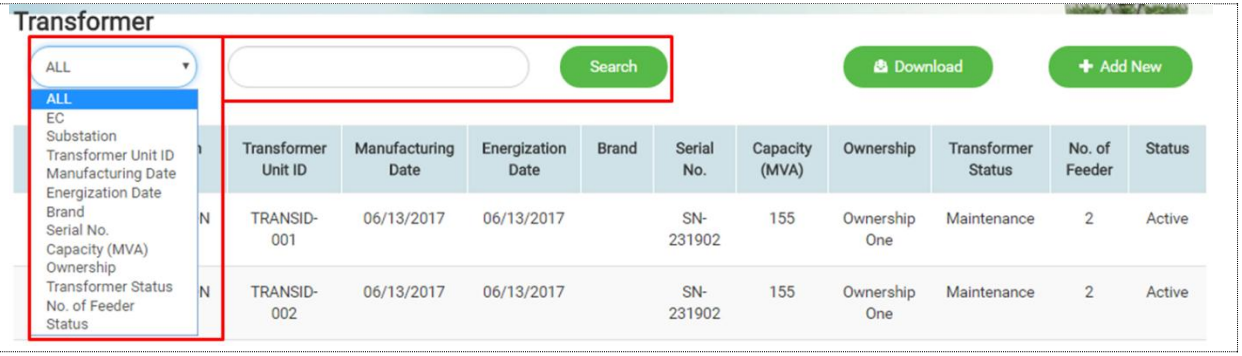
| | |
|---|---|
| 10. System will revert back to the *Transformer* list screen. | |



### 4.7.7 Deactivate Transformer

| | |
|---|---|
| 1. From the *Transformer* list screen, search the Transformer to be deactivated. |  |

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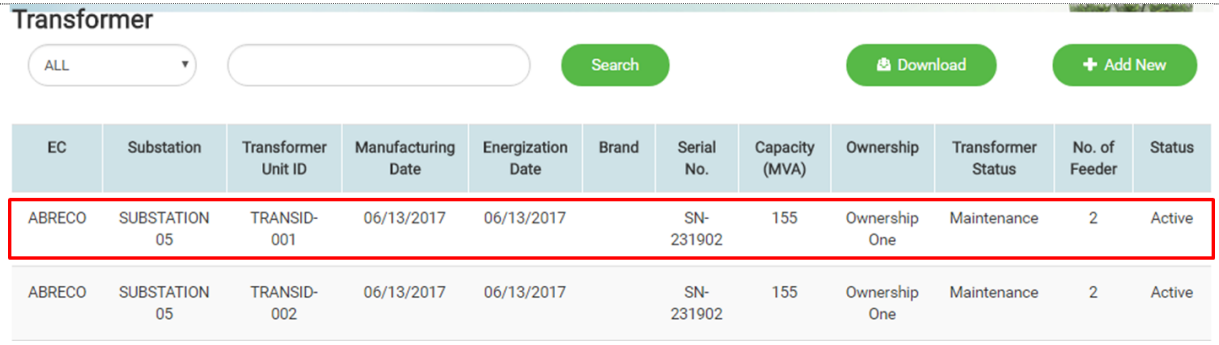
2. Click desired Transformer to be deactivated.




3. System will display the *Transformer* details page.

4. Click **Deactivate** button.

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| | |
|---|---|
| 5. System will display a confirmation prompt.<br><br>6. Click **Yes** button to confirm deactivation. | |
| 7. System will display a prompt.<br><br>8. Click **OK** button. | |


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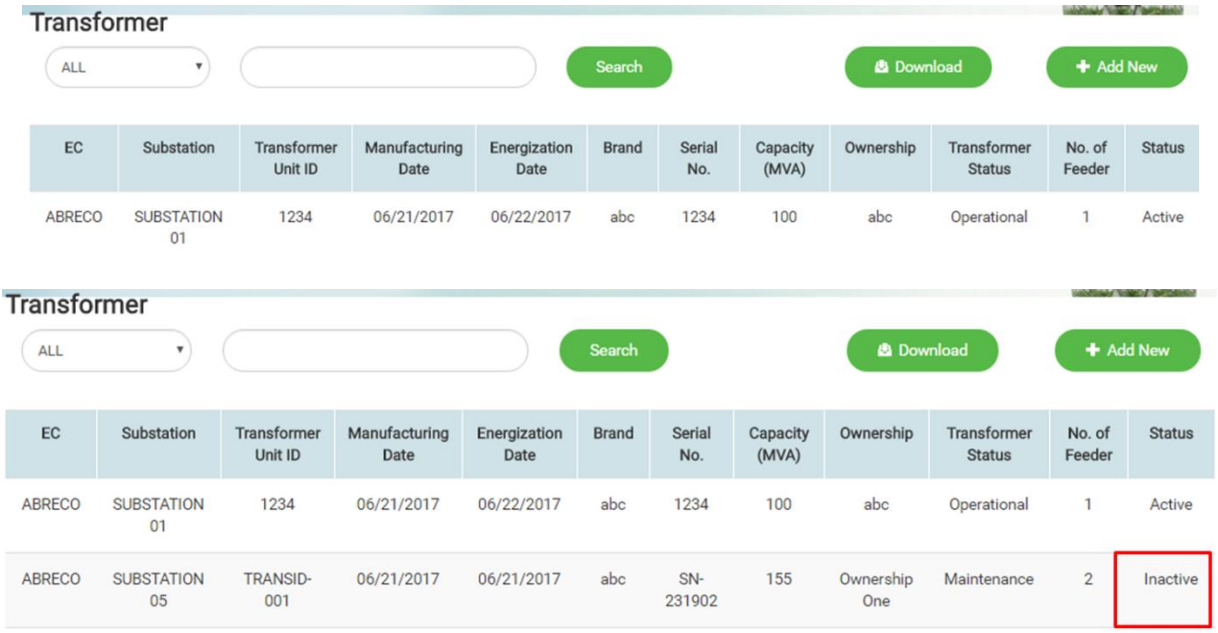
9. System will revert back to the Transformer list screen.

When Transformer is checked, status becomes Inactive.





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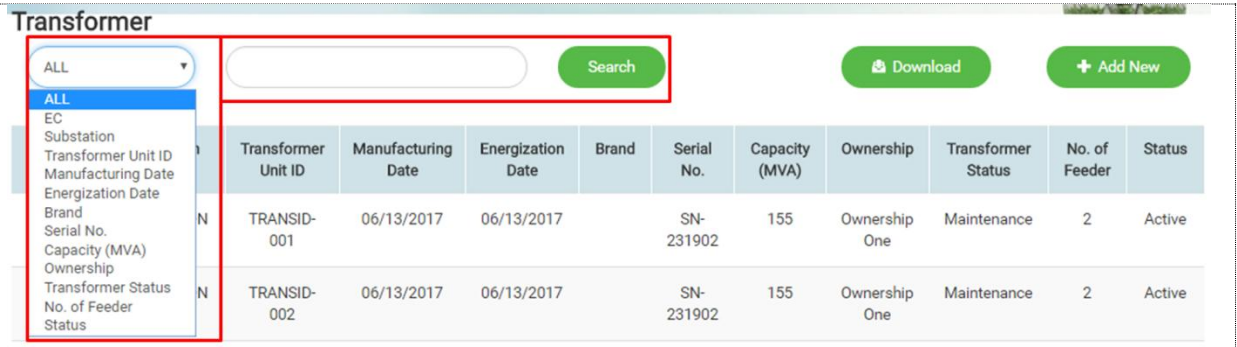
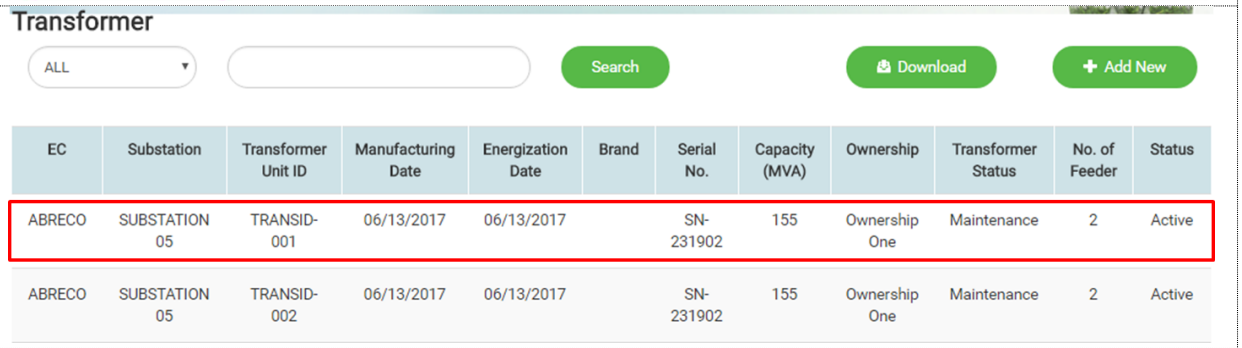
### 4.7.8 Activate Transformer

| | |
|---|---|
| 1. From the *Transformer* list screen, search the Transformer to be activated. |  |
| 2. Click desired Transformer to be activated. |  |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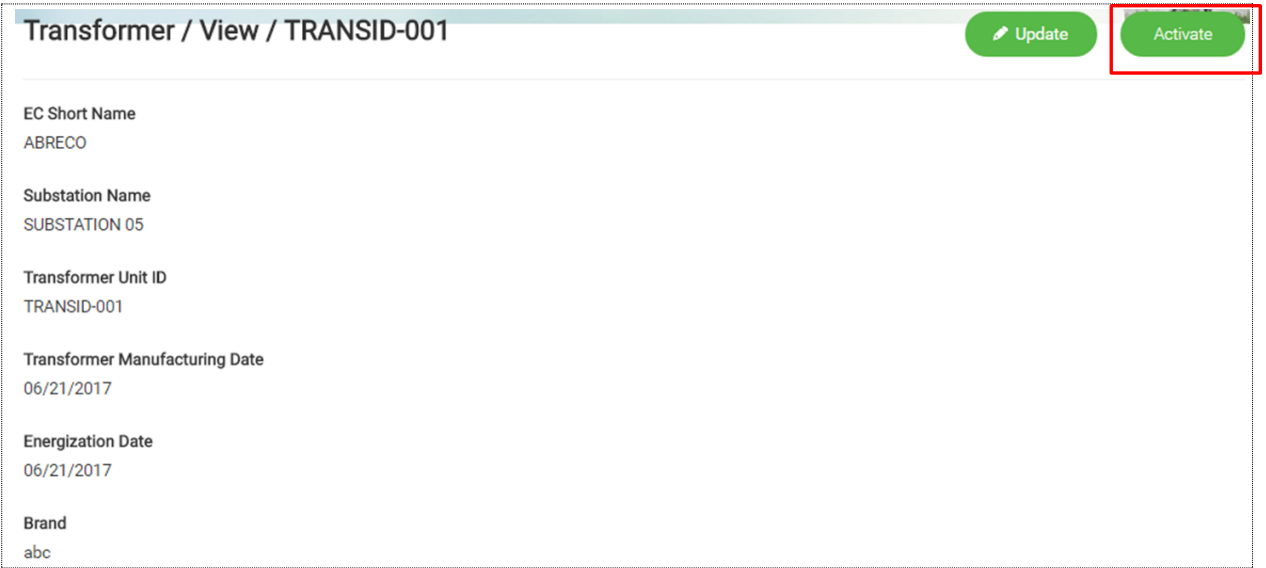
| | |
|---|---|
| 3. System will display the *Transformer* details page.<br><br>4. Click **Activate** button. |  |
| 5. System will display a confirmation prompt.<br><br>6. Click **Yes** button to confirm activation. | |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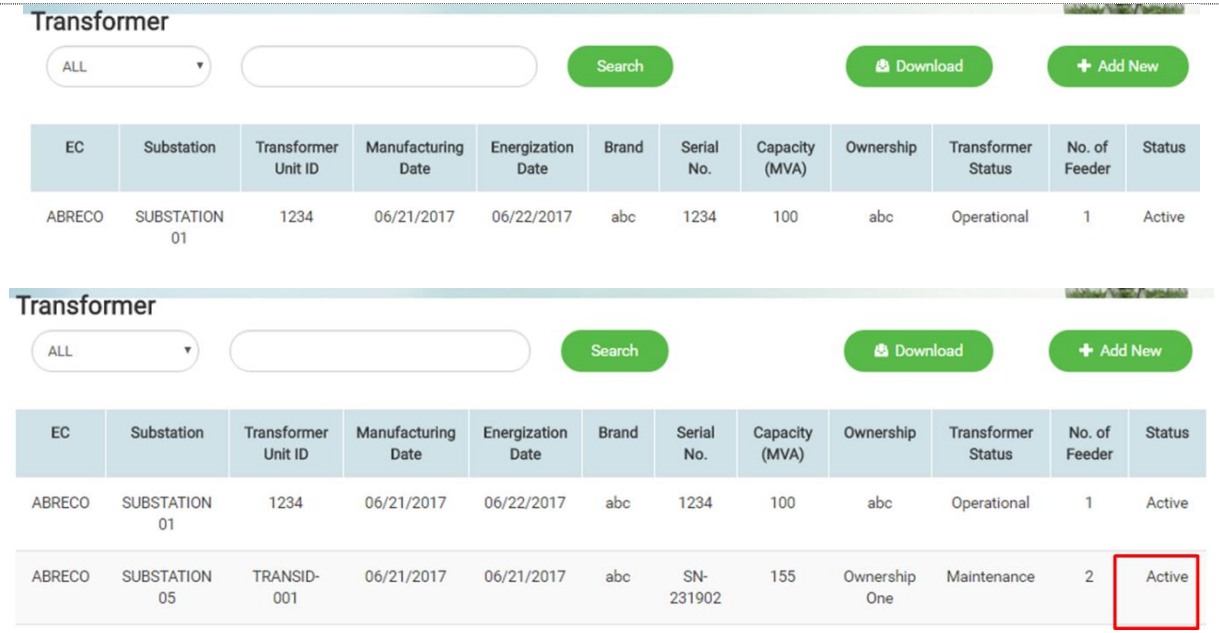
7. System will display a prompt.
8. Click **OK** button.

9. System will revert back to the Transformer list screen.

When Transformer is checked, status becomes Active.





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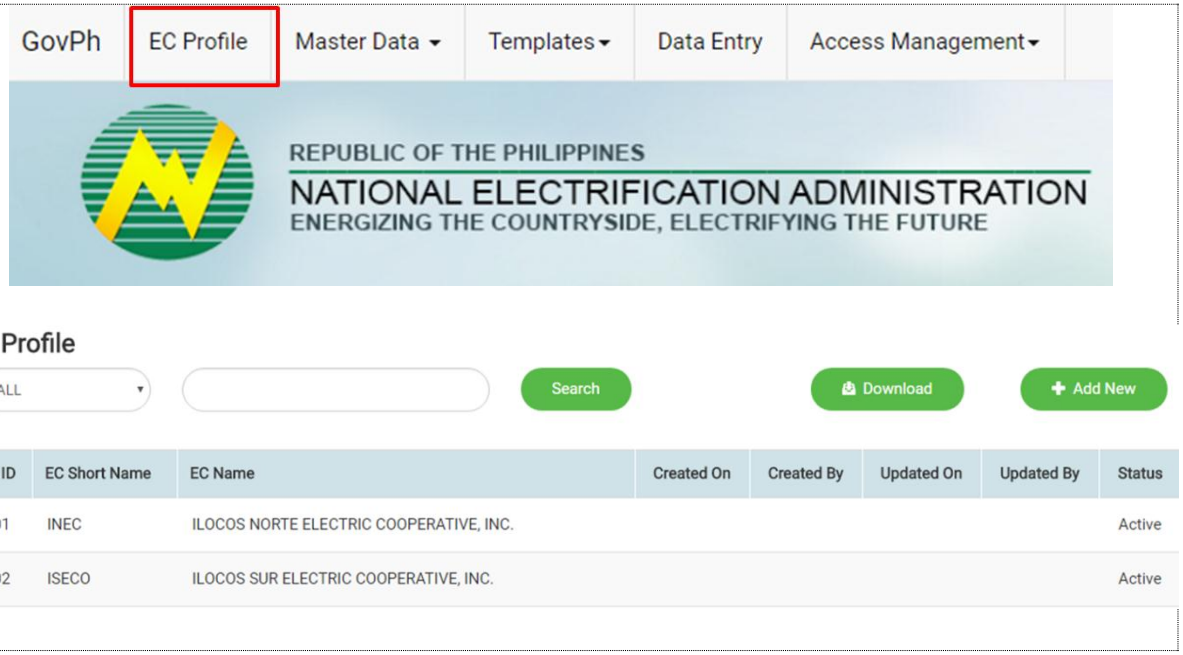
## 4.8 EC Profile Menu

1. Select **EC Profile** from the Menu tab.

2. *EC Profile* list will be displayed.





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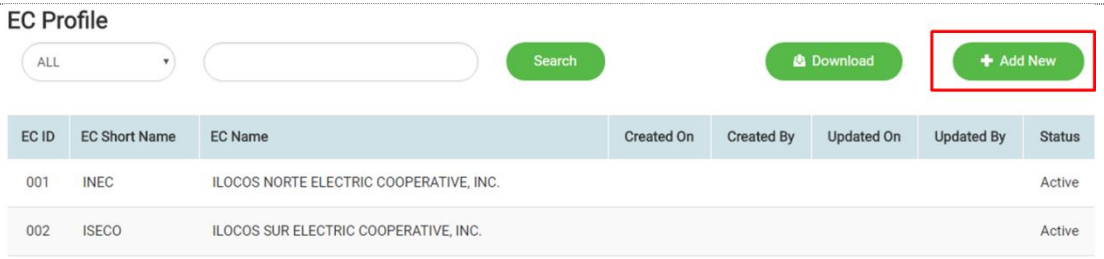
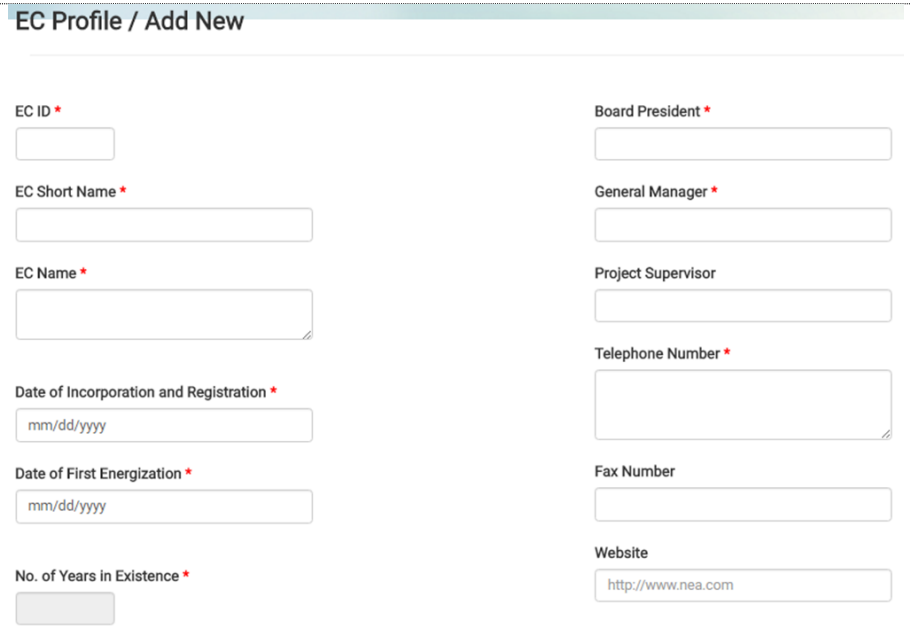
### 4.8.1 Add new EC Profile

1. Click **+ Add New** button in the EC Profile list screen.




2. Fill-out the fields in the *EC Profile/Add New* screen.

Fields with asterisk are required.





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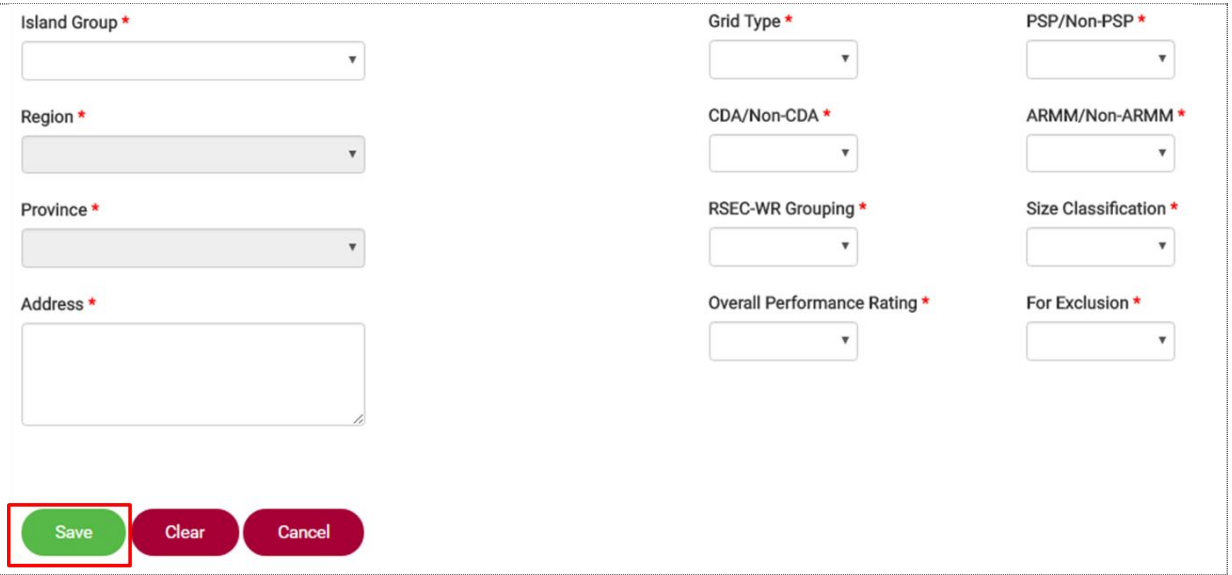
| | |
|---|---|
| 3. Select a value from the dropdown list (if applicable).<br><br>4. Click **Save** button to save the new EC Profile record.<br><br>Clicking **Clear** button will reset previously selected/entered values. |  |
| 5. System will display a prompt.<br><br>6. Click **OK** button on the prompt. | |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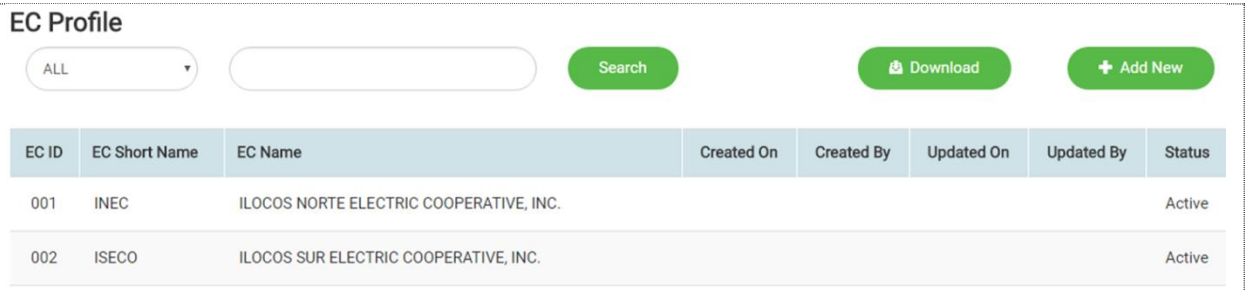
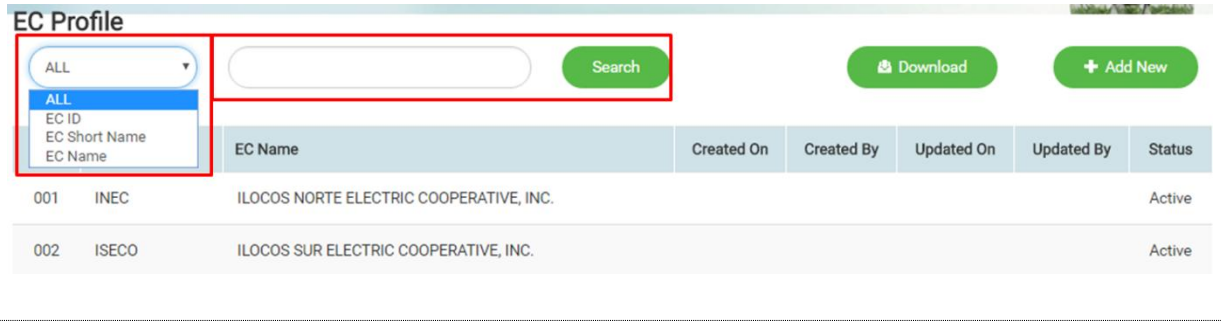
| | |
|---|---|
| 7. System will revert back to the EC Profile list screen. |  |



### 4.8.2 Search an EC Profile

| | |
|---|---|
| 1. From the *EC Profile* search screen, select Filter.<br>• ALL<br>• By EC ID, EC Short Name, EC Name<br>2. Enter keyword.<br>3. Click **Search** button. |  |

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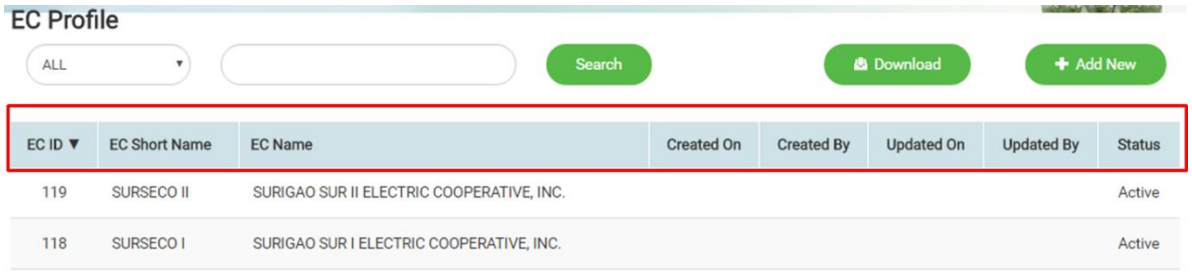
### 4.8.3 Sort Search Results

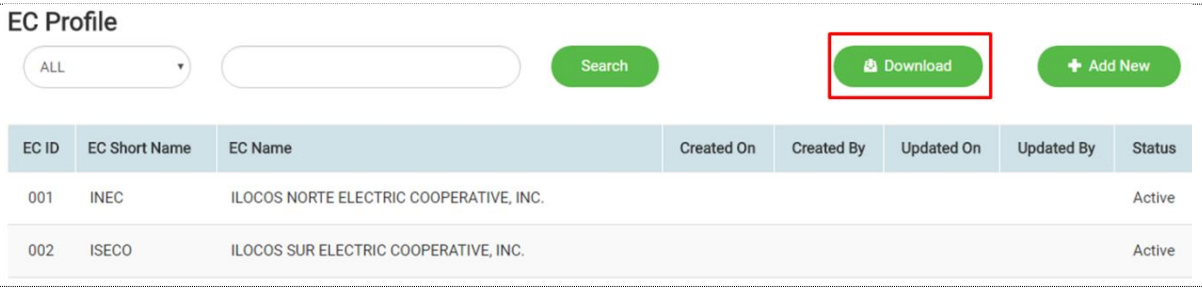
1. From the *EC Profile* list screen, click a column header to sort list.
   - EC ID, EC Short Name, Created On, etc.

Sorting rearranges the entries alphabetically A-Z or Z-A. Click to sort again in the reverse order.




### 4.8.4 Download EC Profile List

1. From the *EC Profile* list screen, click the **Download** button.





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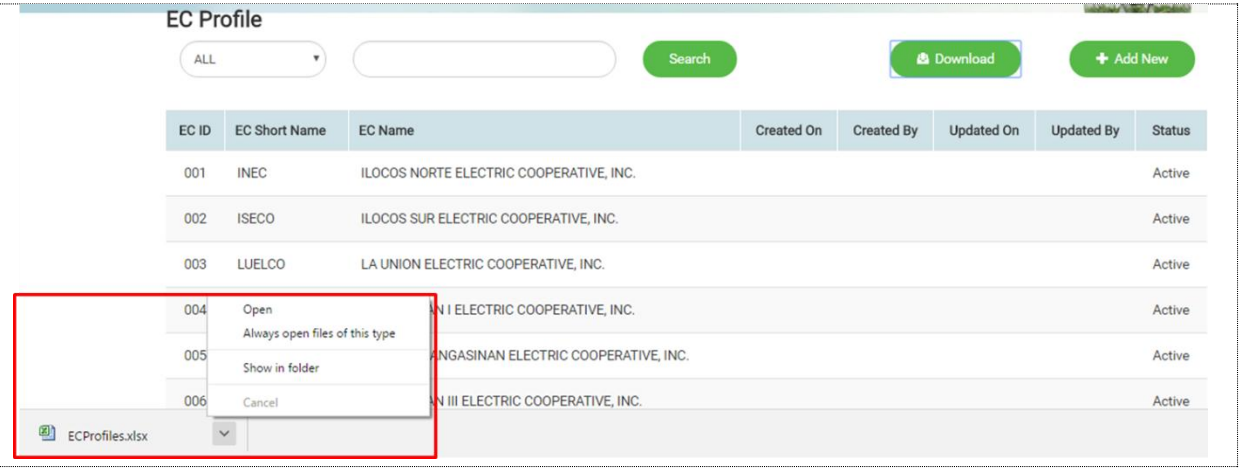
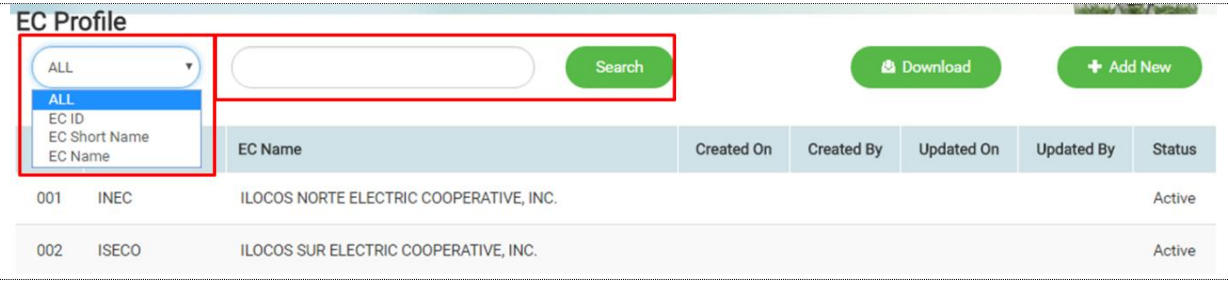
2. EC Profile list will be downloaded in an excel format.

3. Click the file to open and save in computer.




### 4.8.5 View EC Profile

1. From the *EC Profile* list screen, search the EC Profile to be viewed.





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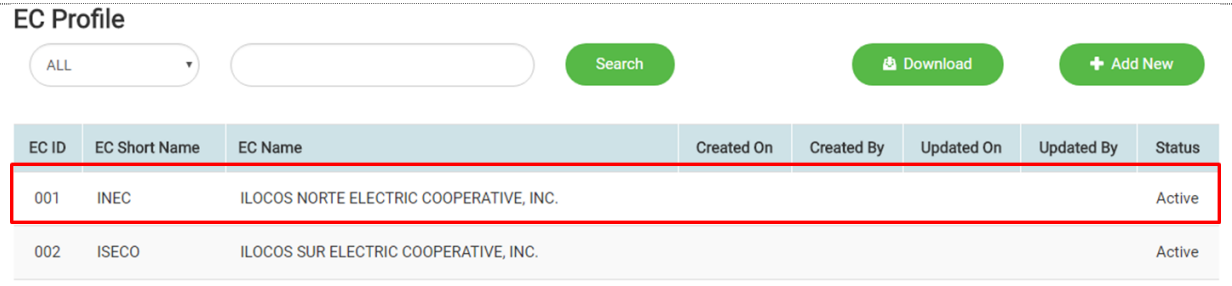
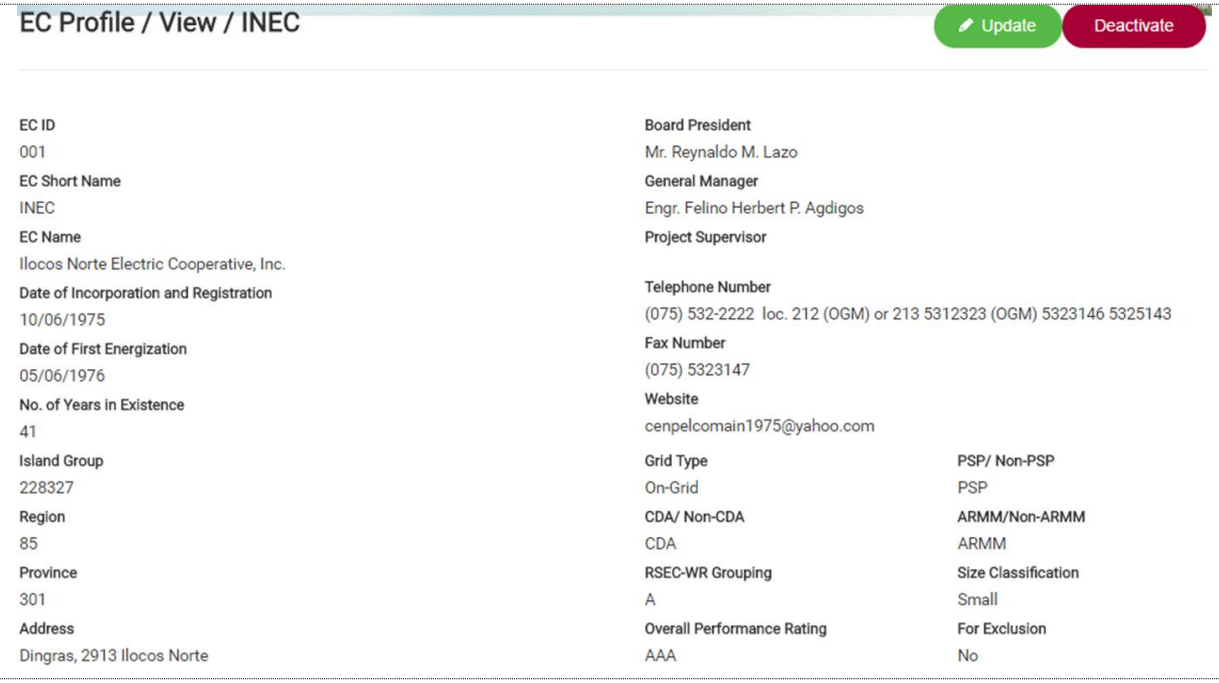
2. Click desired EC Profile to be viewed.




3. System will display the *EC Profile* details page.





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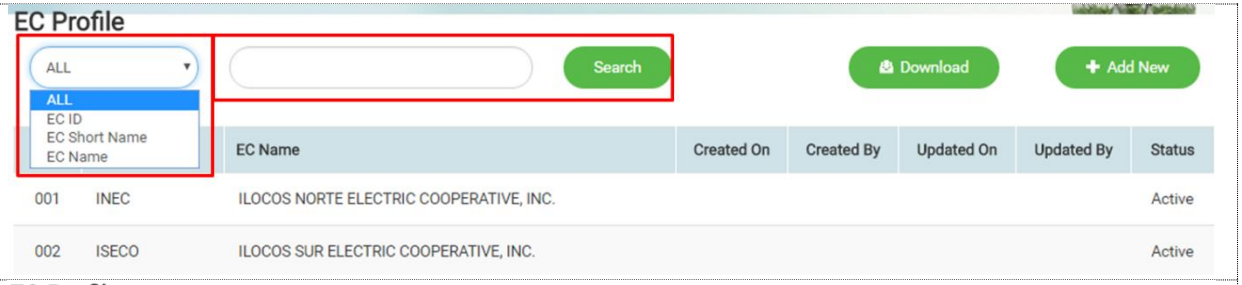
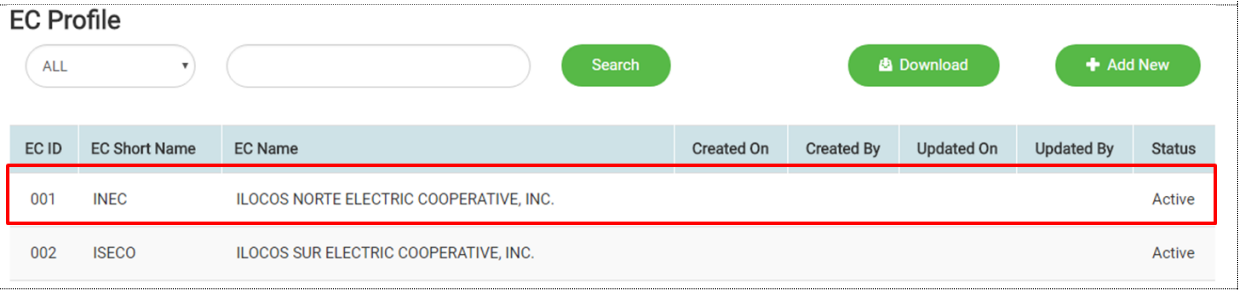
### 4.8.6 Update EC Profile

| | |
|---|---|
| 1. From the *EC Profile* list screen, search the EC Profile to be updated. |  |
| 2. Click desired EC Profile to be updated. |  |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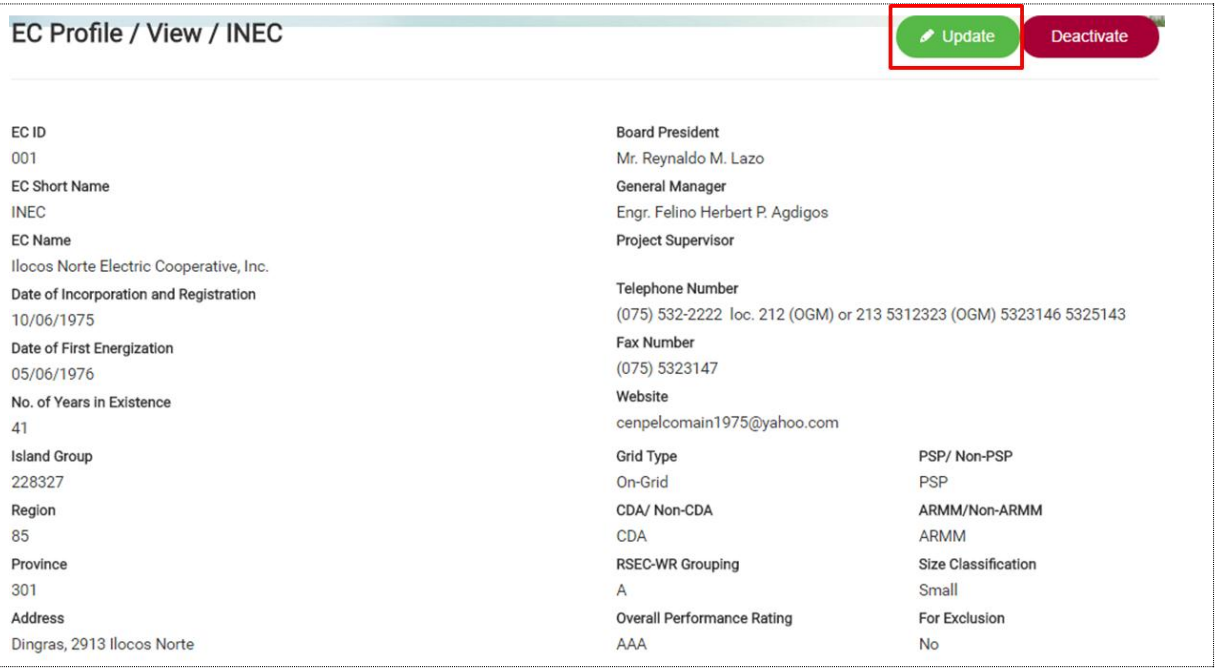
3. System will display the *EC Profile* details page.

4. Click **Update** button.





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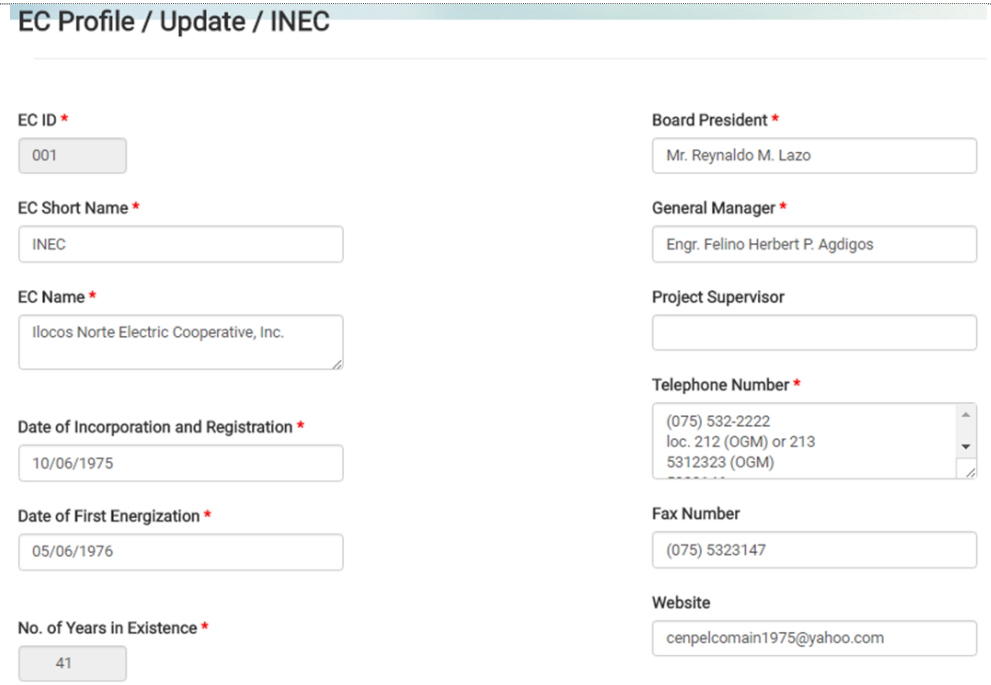
5. System will display the *EC Profile/Update* details page.

6. Update EC Profile details.





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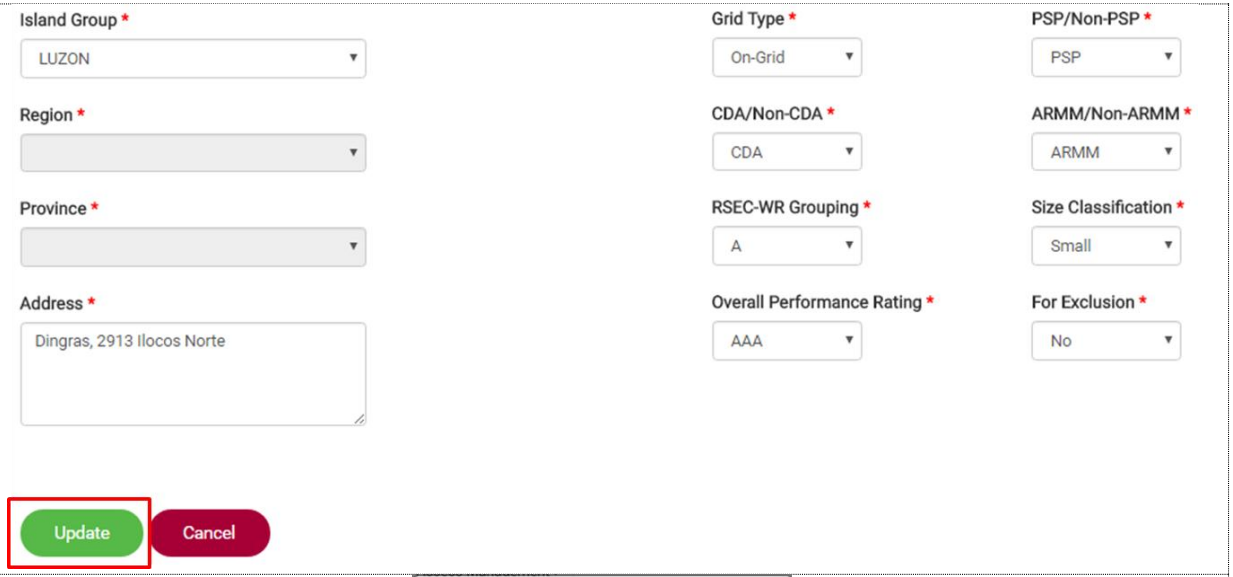
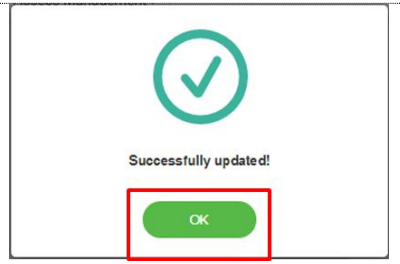
| | |
|---|---|
| 7. Click **Update** button. |  |
| 8. System will display a prompt.<br>9. Click **OK** button. |  |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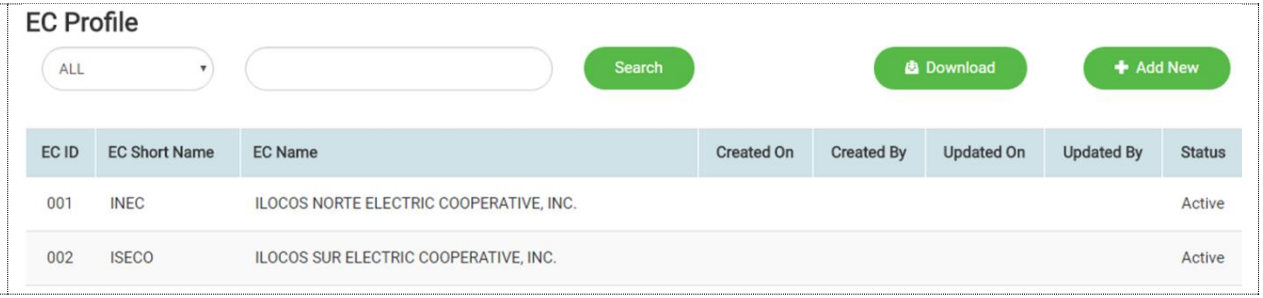
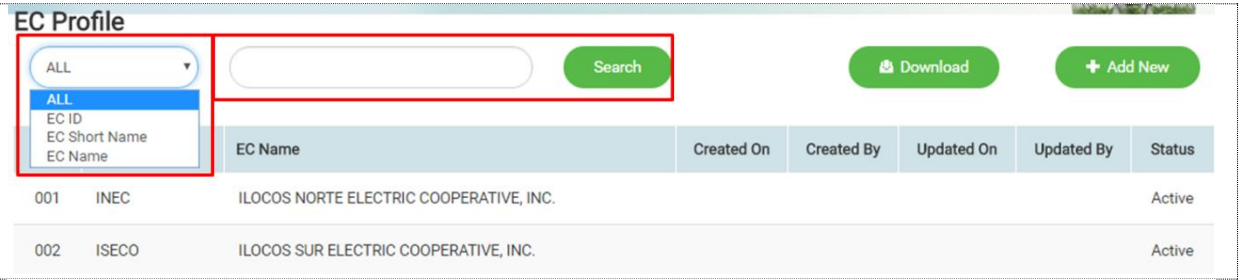
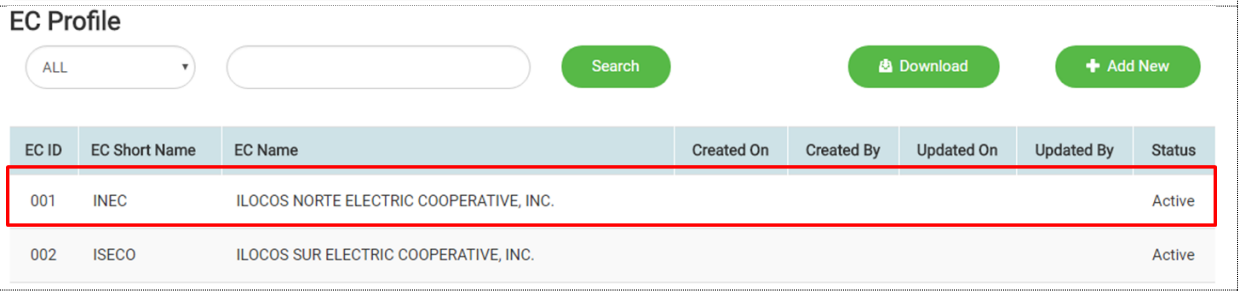
| | |
|---|---|
| 10. System will revert back to the *EC Profile* list screen. |  |



### 4.8.7 Deactivate EC Profile

| | |
|---|---|
| 1. From the *EC Profile* list screen, search the EC Profile to be deactivated. |  |
| 2. Click desired EC Profile to be deactivated. |  |

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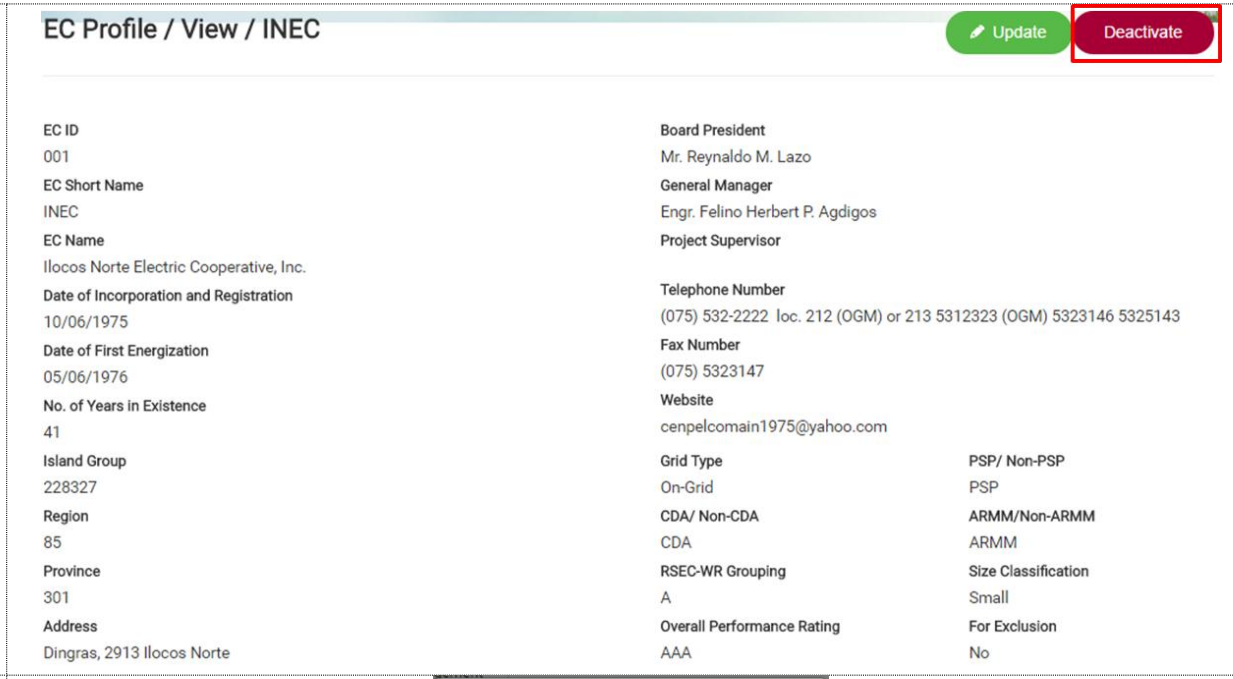
3. System will display the *EC Profile* details page.

4. Click **Deactivate** button.




5. System will display a confirmation prompt.

6. Click **Yes** button to confirm deactivation.

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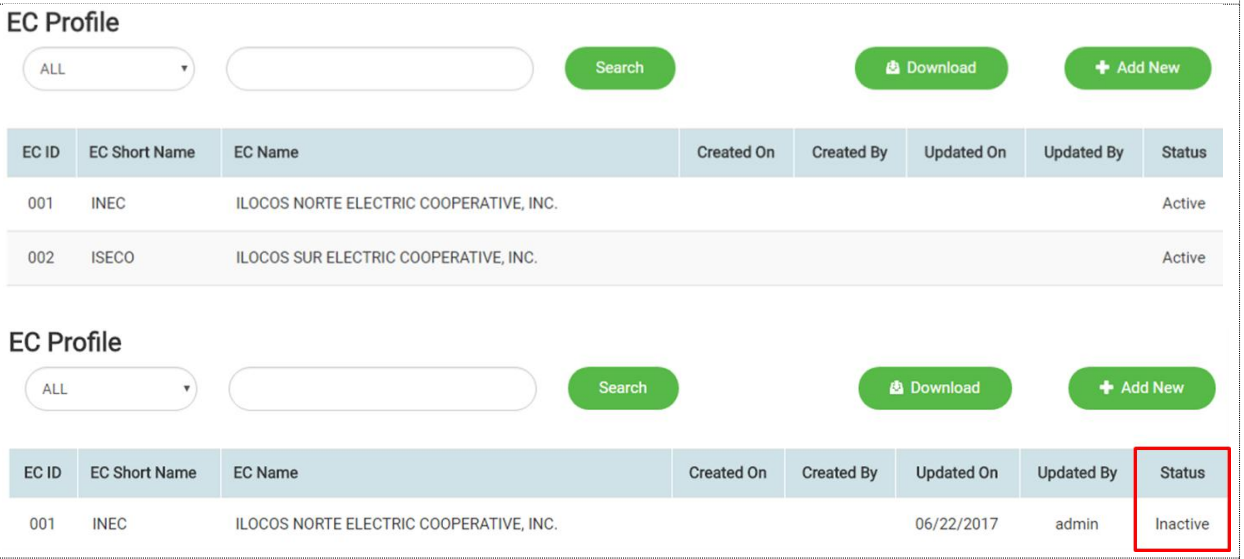
7. System will display a prompt.
8. Click **OK** button.

9. System will revert back to the EC Profile list screen.

When EC Profile is checked, status becomes Inactive.





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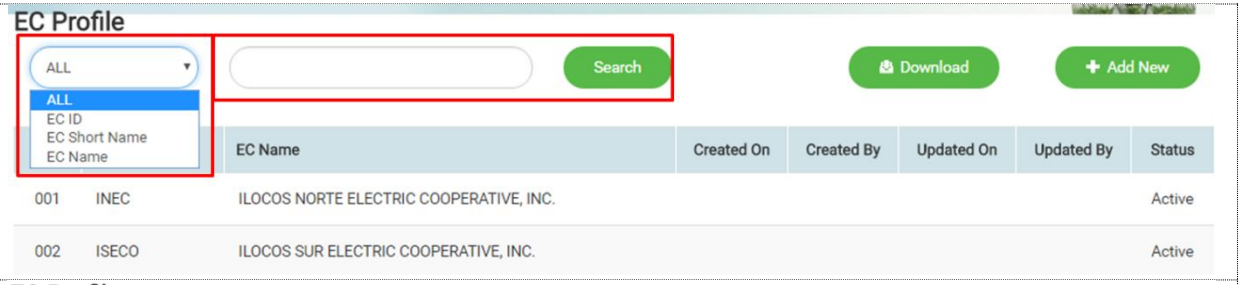
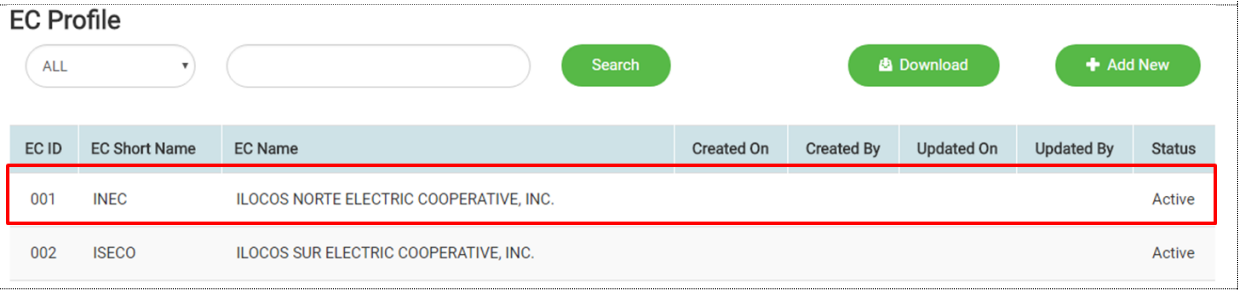
### 4.8.8 Activate EC Profile

| | |
|---|---|
| 1. From the *EC Profile* list screen, search the EC Profile to be activated. |  |
| 2. Click desired EC Profile to be activated. |  |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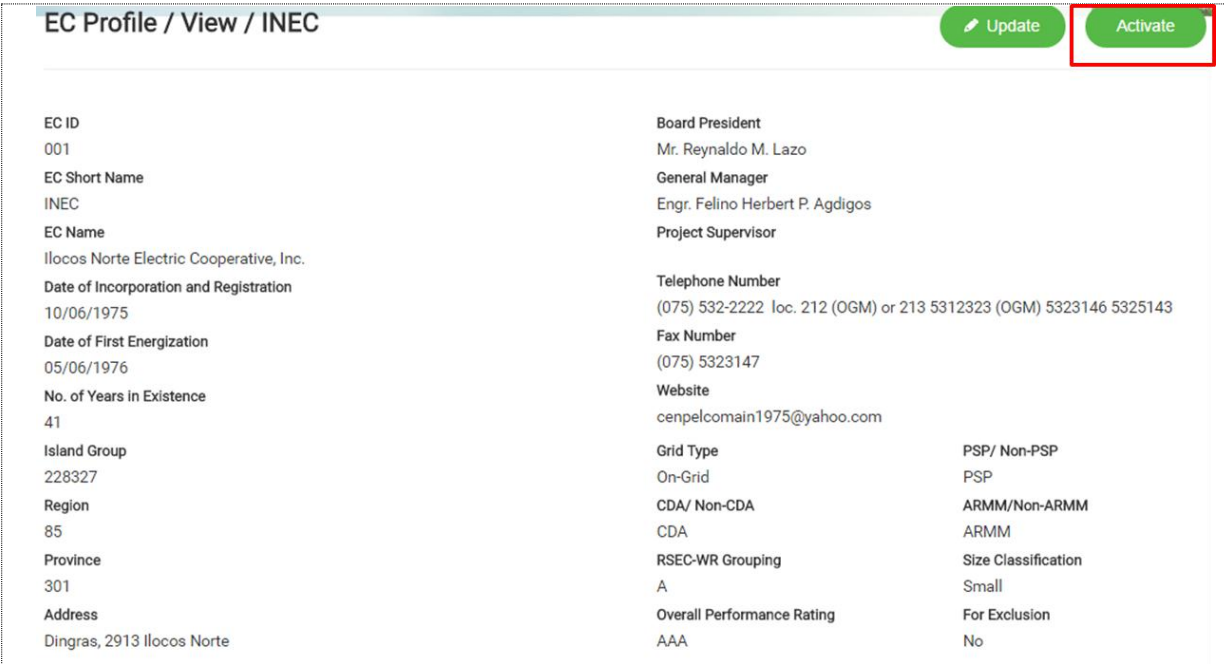
3. System will display the *EC Profile* details page.

4. Click **Activate** button.




5. System will display a confirmation prompt.

6. Click **Yes** button to confirm activation.

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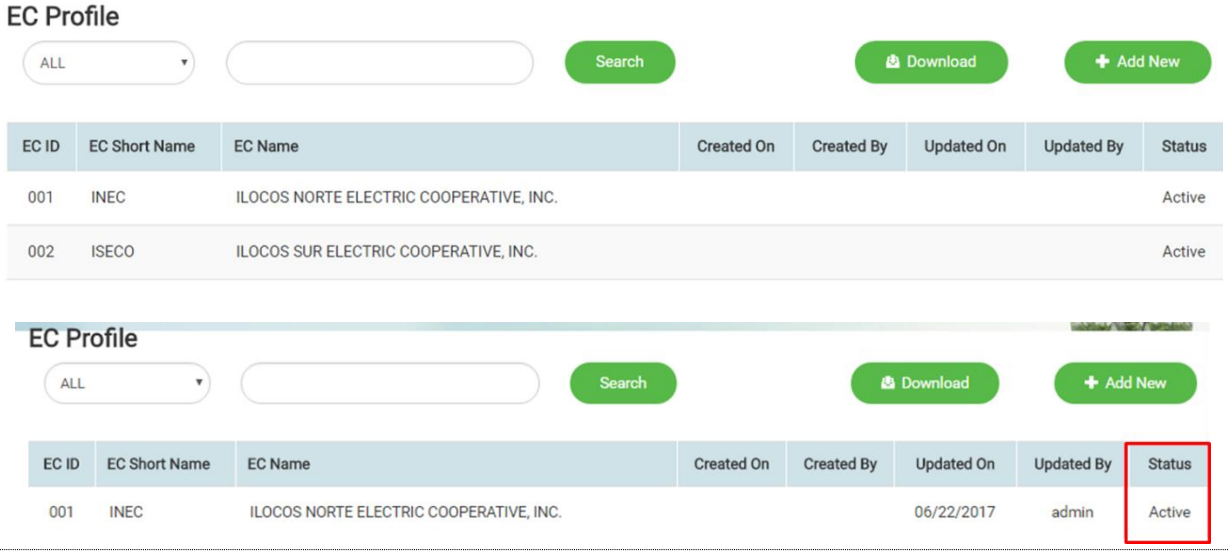
| | |
|---|---|
| 7. System will display a prompt.<br>8. Click **OK** button. | |
| 9. System will revert back to the EC Profile list screen.<br>When EC Profile is checked, status becomes Active. |  |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# WEB PORTAL NAVIGATION FOR DATA PROVIDERS

NEA Web Portal

INDRA Philippines, Inc.

July 2017


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# 5 WEB PORTAL NAVIGATION FOR DATA PROVIDERS

The main role of the Data Providers is to upload the following DETs to the NEA Web Portal:

- DET024 Power Accounts Payable
- DET026 Releases
- DET025 Schedule of Outstanding Loan
- DET038 GM Performance Rating

The Data Providers thus will have access to *DET Templates* submenu to download the DET template and *Data Entry* menu to upload the accomplished DETs.

This section will guide the Data Providers in navigating the aforementioned functionalities.


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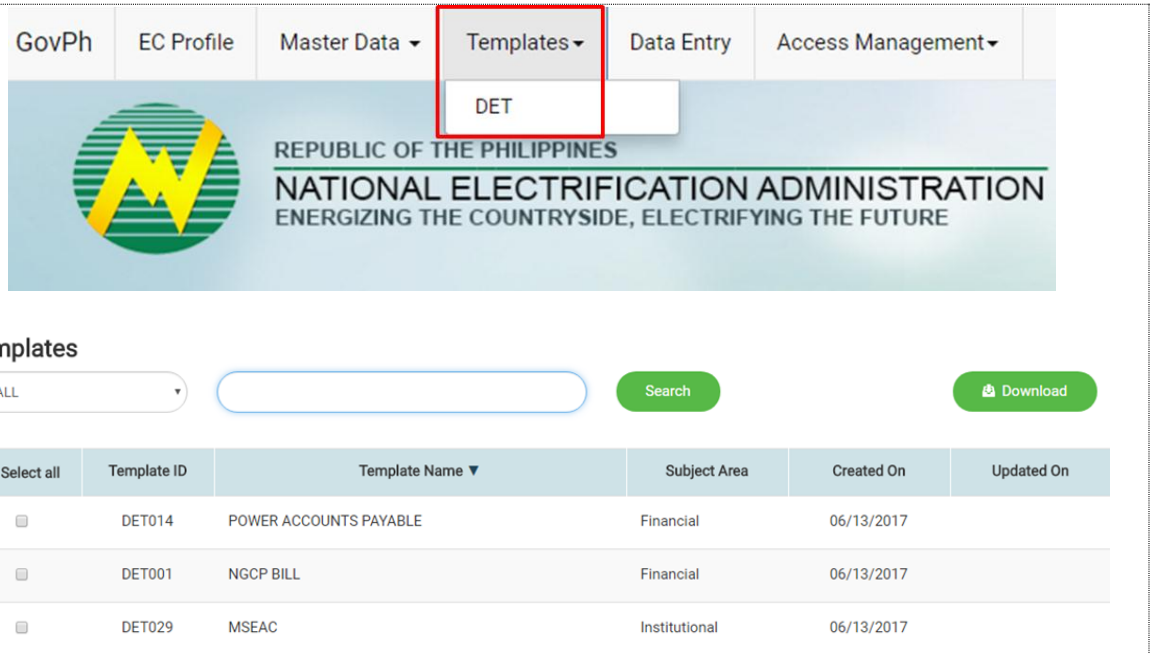
## 5.1 DET Templates Submenu

1. Select **Templates > DET** from the Menu tab.

2. *Templates* list will be displayed.





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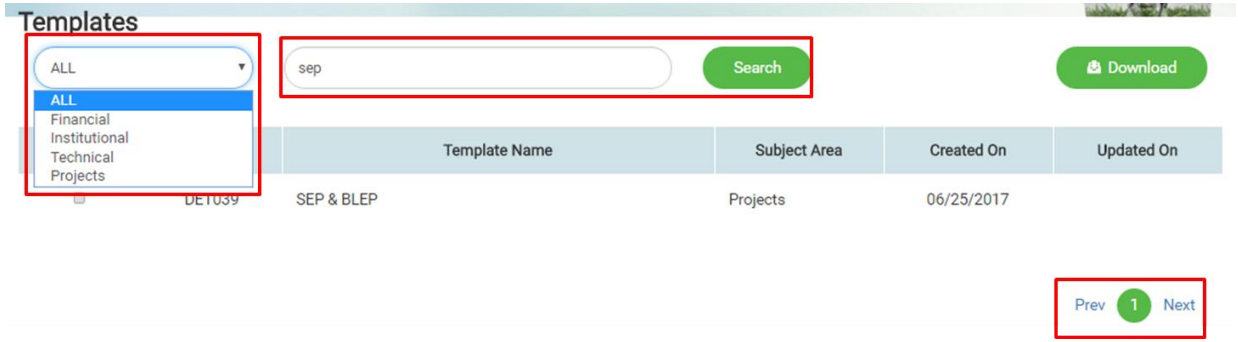
### 5.1.1 Search a DET Template

1. From the *Templates* list search screen, enter keyword.
   - ALL
   - Search by Subject Area: Financial, Institutional, Technical, Projects
2. Enter keyword.
3. Click **Search** button.

Click **Previous** or **Next** button to view search results in other pages.





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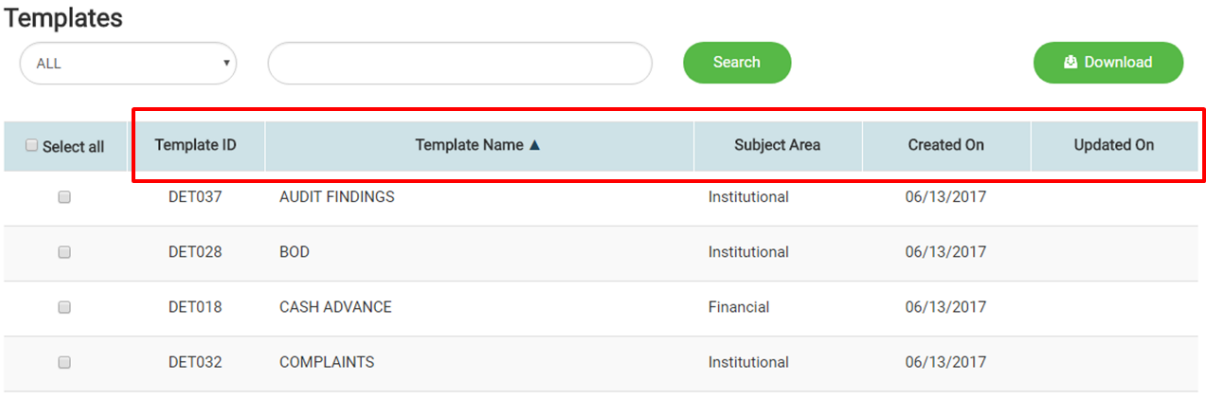
### 5.1.2 Sort Search Results

1. From the *Templates* list screen, click a column header to sort list.
   - Template ID, Template Name, Subject Area, Created On or Updated On

Sorting rearranges the entries alphabetically A-Z or Z-A. Click to sort again in the reverse order.





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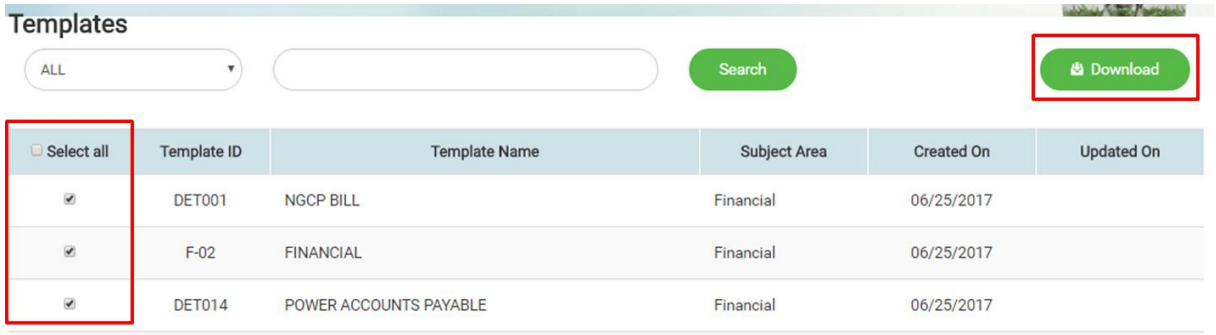
### 5.1.3 Download DET Template

1. From the *Templates* list screen, select the tick box of the desired template.

   Selecting multiple files to download is allowed

2. Click the **Download** button.





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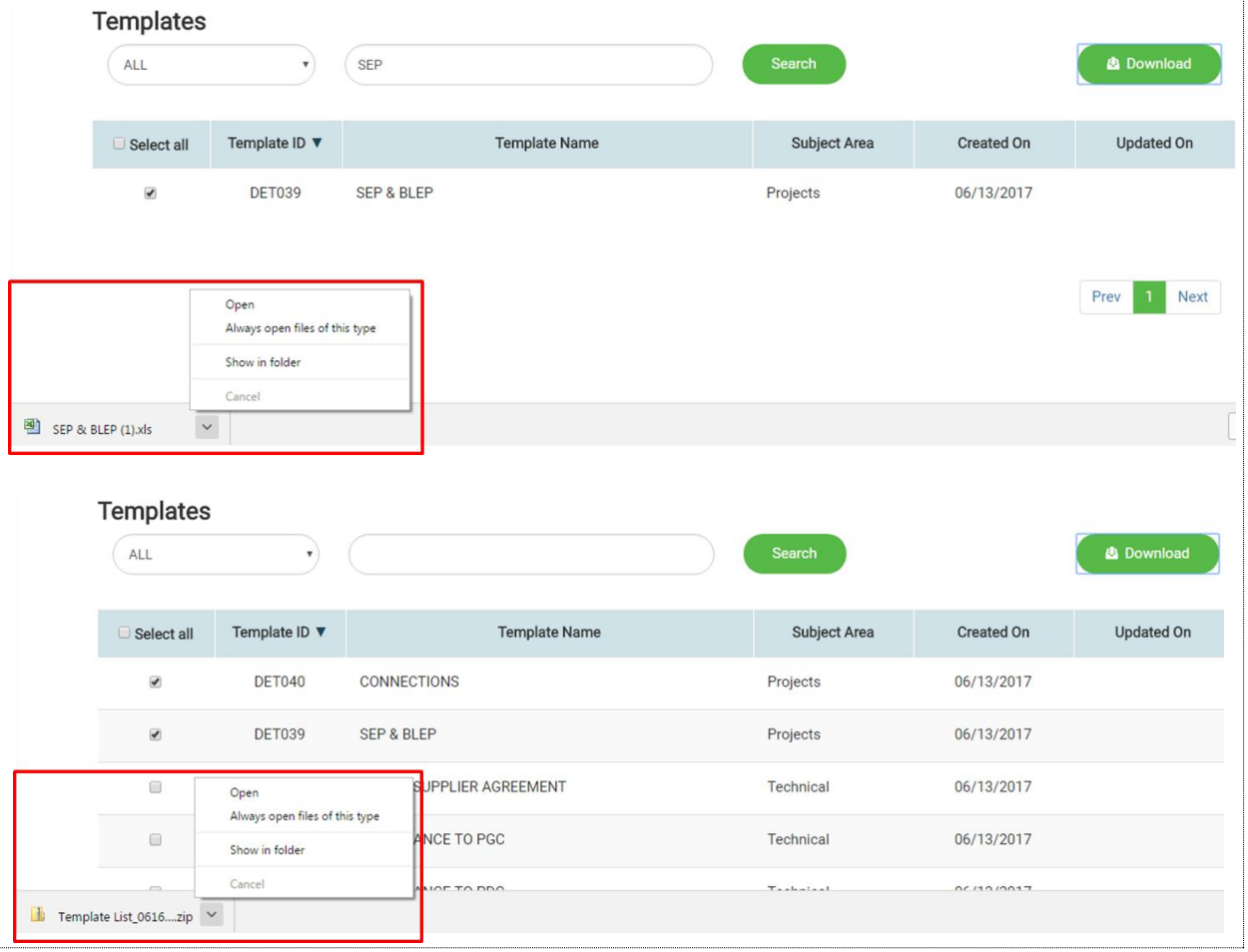
3. DET Template will be downloaded in an excel format.

4. Click the file to open and save in computer.

For multiple files, files will be downloaded in a compressed folder. Open compressed folder and save in computer.





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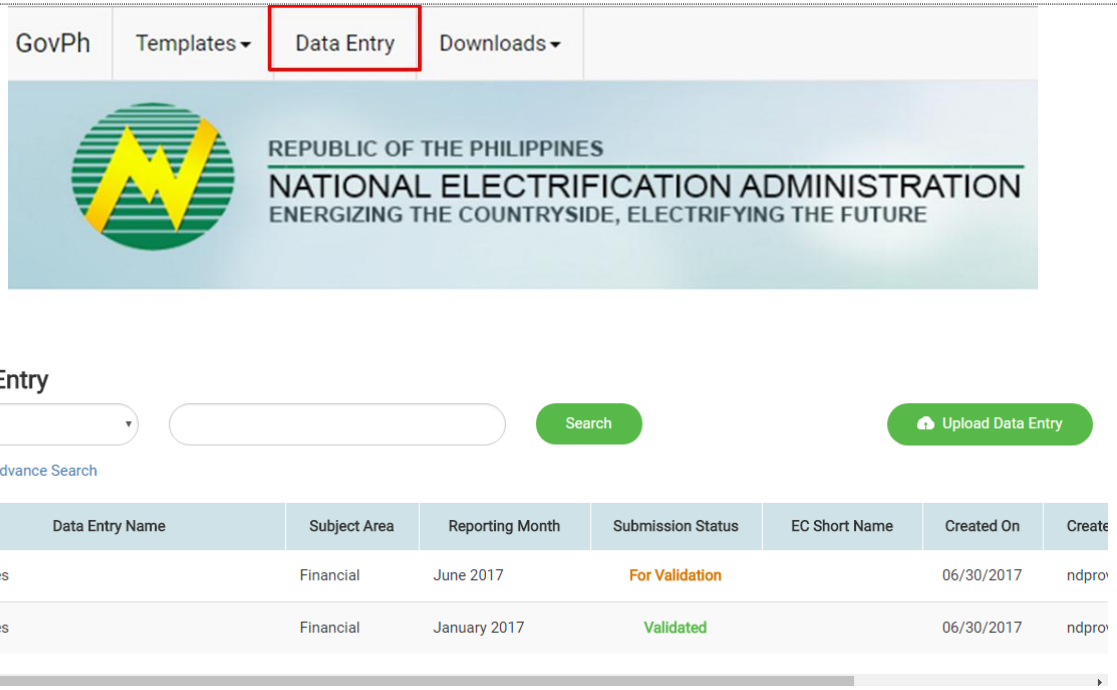
## 5.2 Data Entry menu

1. Select **Data Entry** from the Menu tab.
2. *Data Entry list* will be displayed.





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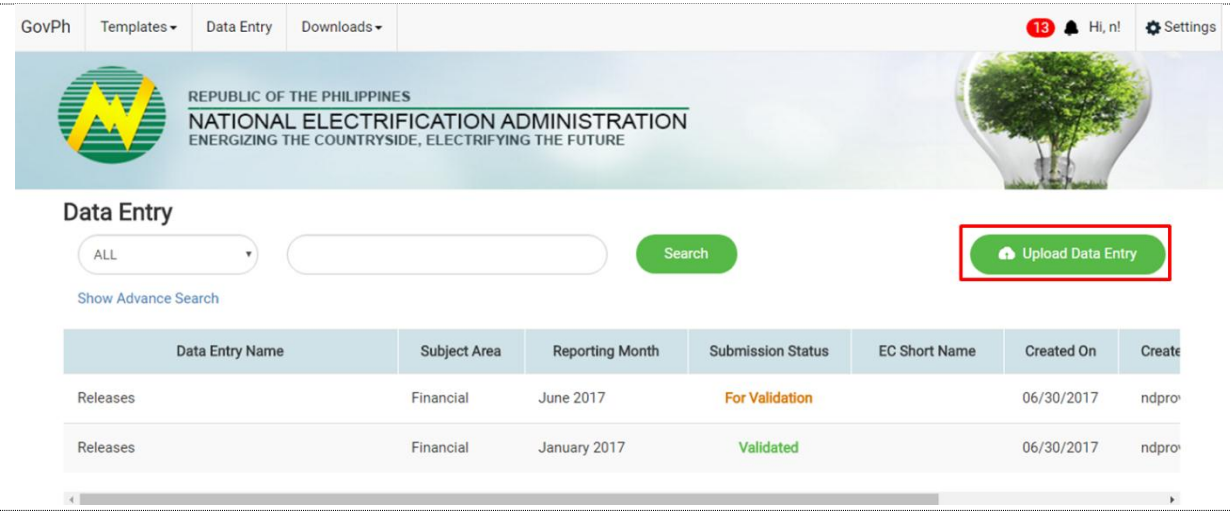
### 5.2.1 Upload Data Entry

1. From the Data Entry search screen, click **Upload Data Entry** button.





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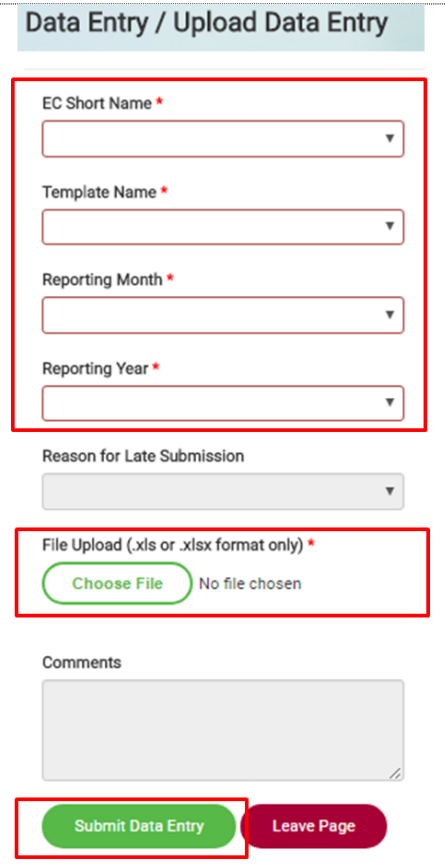
2. In the *Data Entry/Upload Data Entry* screen, fill-out required fields:
   - EC Short Name
   - Template Name
   - Reporting Month
   - Reporting Year

3. Click **Choose File** button and select accomplished DET from the computer.

4. Click Submit Data Entry button.

Click **Leave Page** button to revert back to the Data Entry list.





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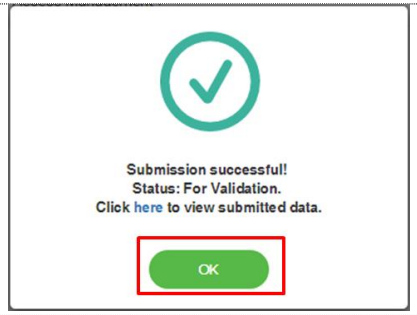
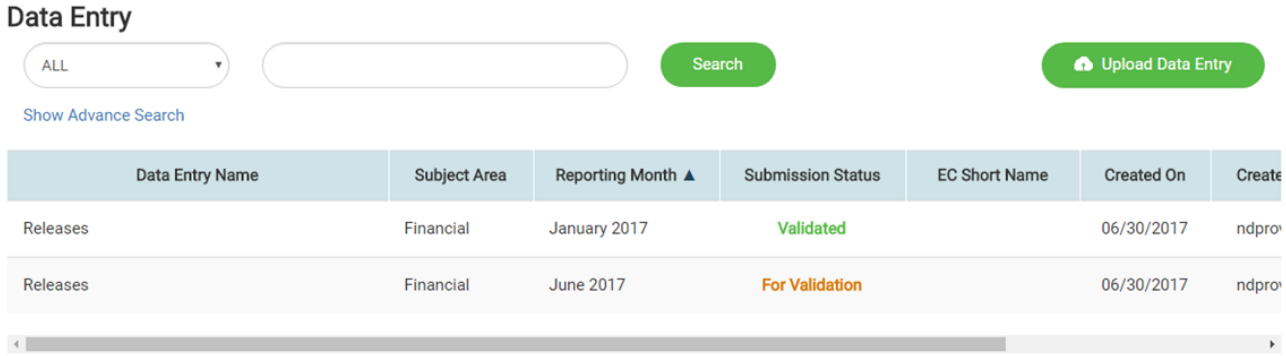
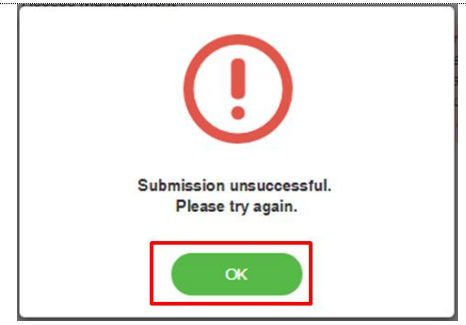
| | |
|---|---|
| **FOR SUBMISSIONS WITH NO DATA ERROR**<br><br>5. System will display a prompt.<br><br>6. Click **OK** button on the prompt. |  |
| 7. System will revert back to the Data Entry list screen. |  |
| **FOR SUBMISSIONS WITH DATA ERROR**<br><br>5. System will display a prompt.<br><br>6. Click **OK** button on the prompt. |  |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7. System will display errors on the screen.

8. User may opt to download the error log by clicking **Download Error Log** link.

9. Click the error log to open the file.

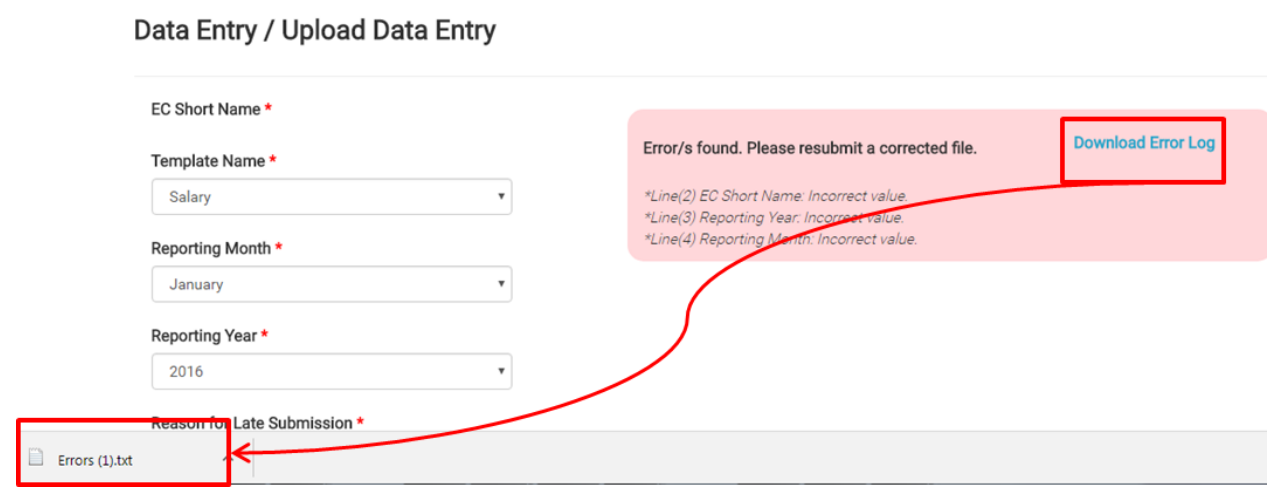
**Possible Data Errors**:

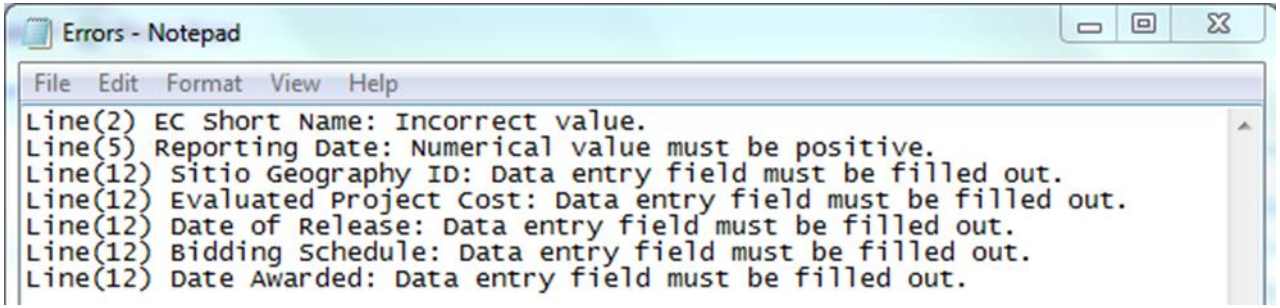
a. Incorrect format
   - DET should be in .xls or .xlsx format only.

b. Required fields not filled-out.
   - Fields with asterisk (*) are required.

c. Values in DET do not match with the details encoded in the Data Entry screen
   - EC Short Name, Template Name, Reporting Month, Reporting Year

Note: Unsuccessful submissions due to data errors will not be saved in the Web Portal.





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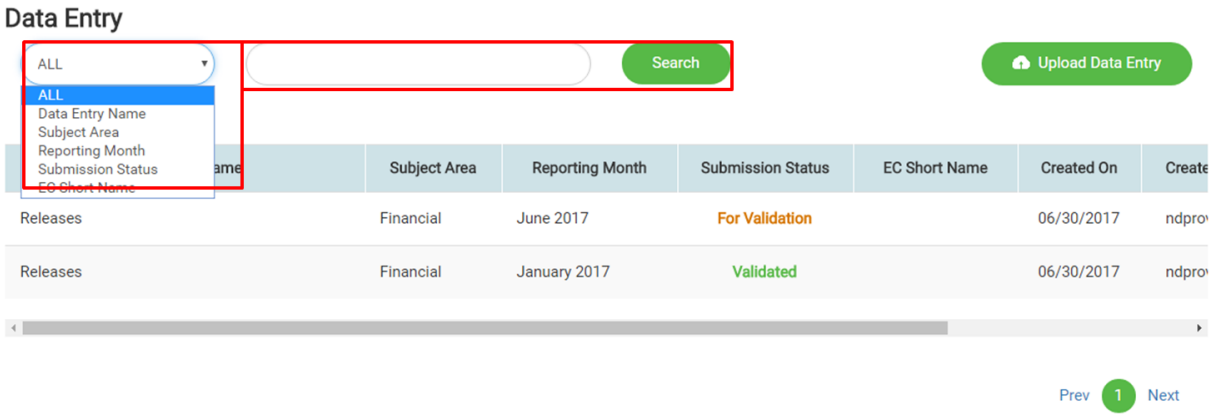
| | |
|---|---|
| 10. Click the **Leave Page** button at the bottom of *Data Entry/Upload Data Entry* screen to leave the page. | |

### 5.2.2 Search a Data Entry

| | |
|---|---|
| 1. From the *Data Entry* list, select Filter.<br>• ALL<br>• Search by Data Entry Name, Subject Area, Reporting Month, etc.<br><br>2. Enter keyword.<br><br>3. Click **Search** button.<br><br>Click **Previous** or **Next** button to view search results in other pages. |  |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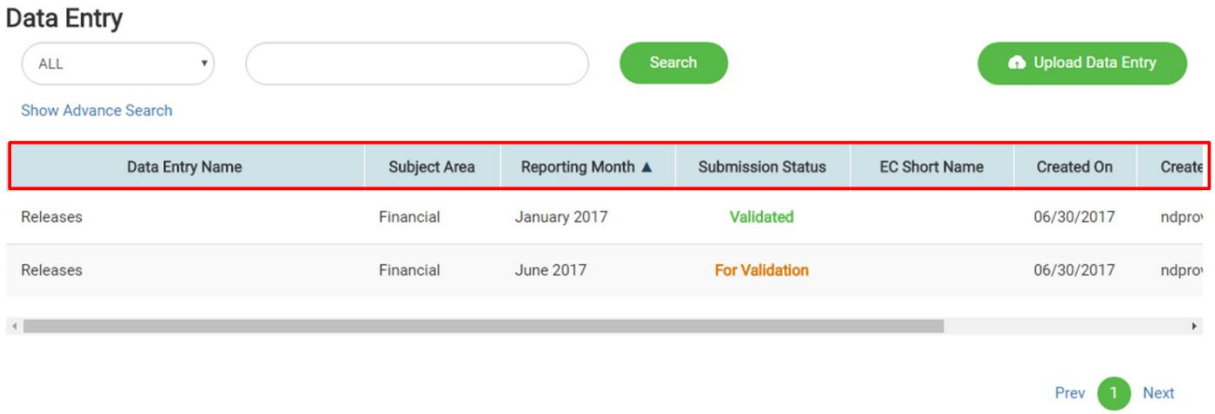
### 5.2.3 Sort Search Results

1. From the *Data Entry* list, click Column Header of the column to be sorted.
    - Data Entry Name, Subject Area, Reporting Month, etc.

Sorting rearranges the entries alphabetically A-Z or Z-A. Click to sort again in the reverse order.




### 5.2.4 View Data Entry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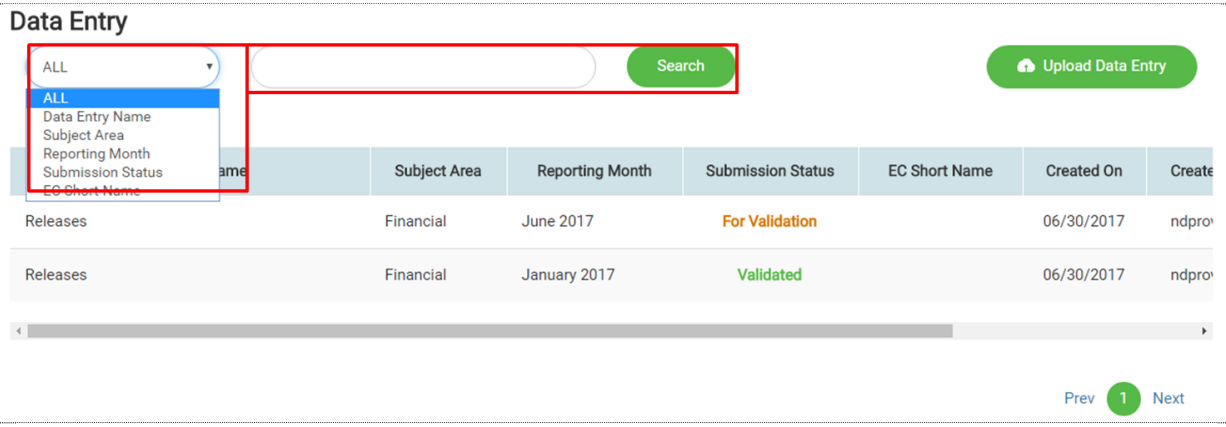
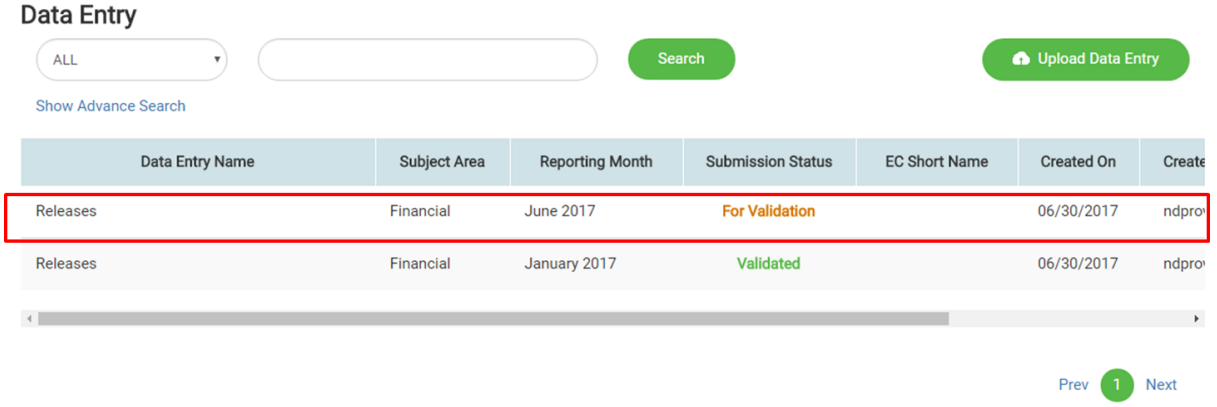
| | |
|---|---|
| 1. From the *Data Entry* list, search the DET. |  |
| 2. Click desired DET from the Data Entry list. |  |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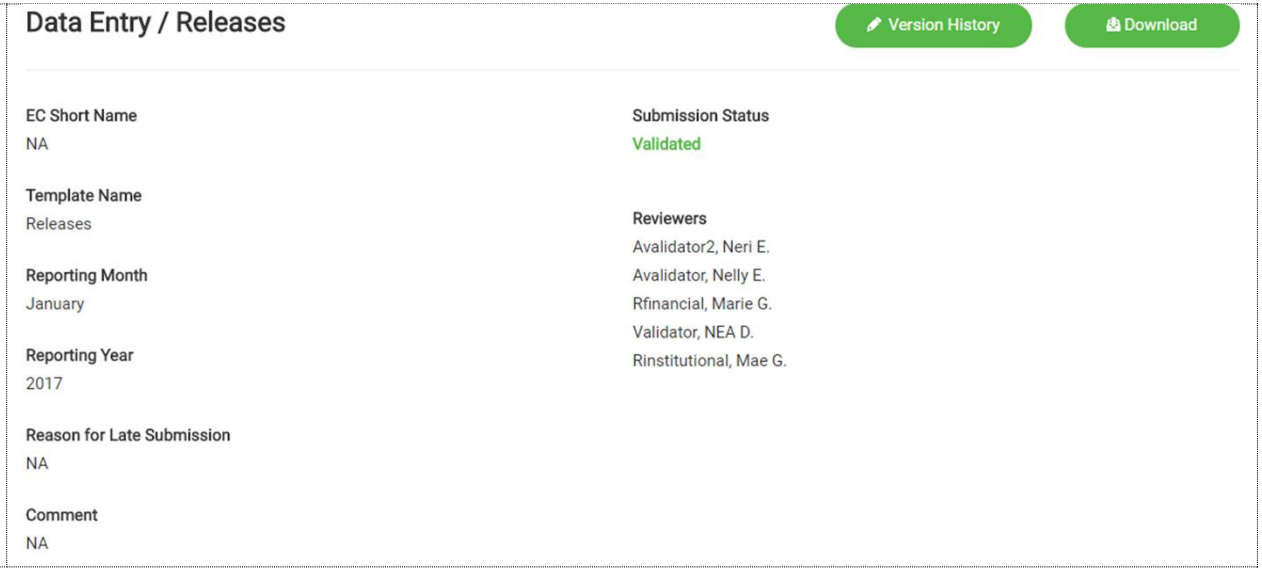
| | |
|---|---|
| 3. System will display the *Data Entry* details page. |  |

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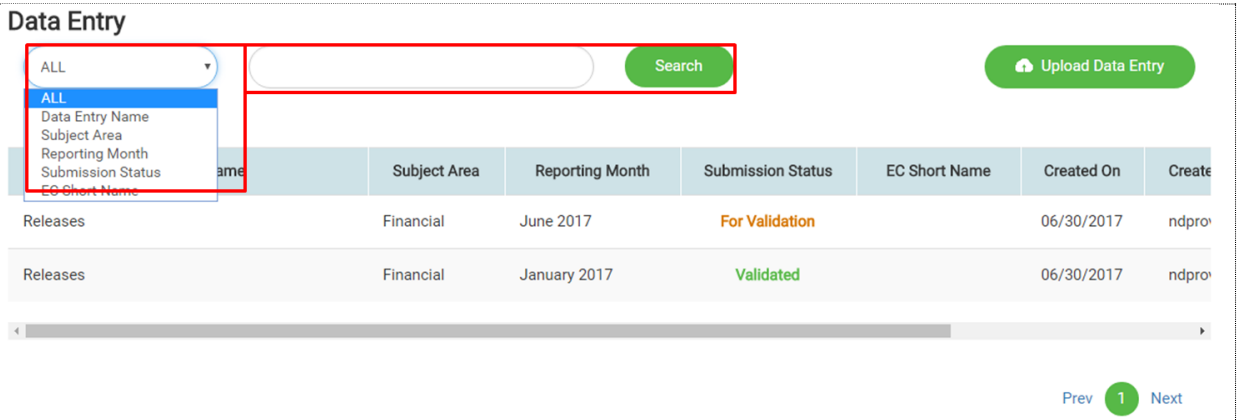
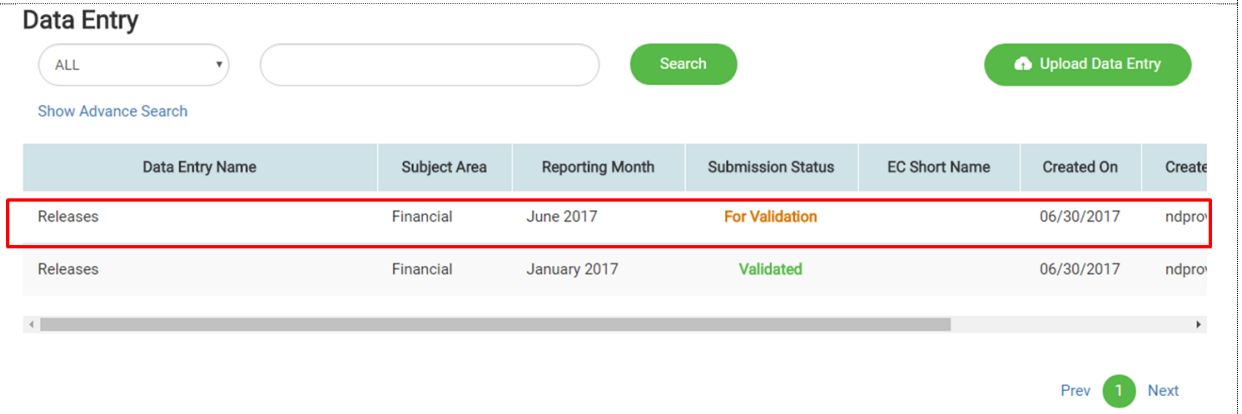
### 5.2.5 View Version History

1. From the *Data Entry* list, search the DET to be viewed.




2. Click desired DET from the Data Entry list.





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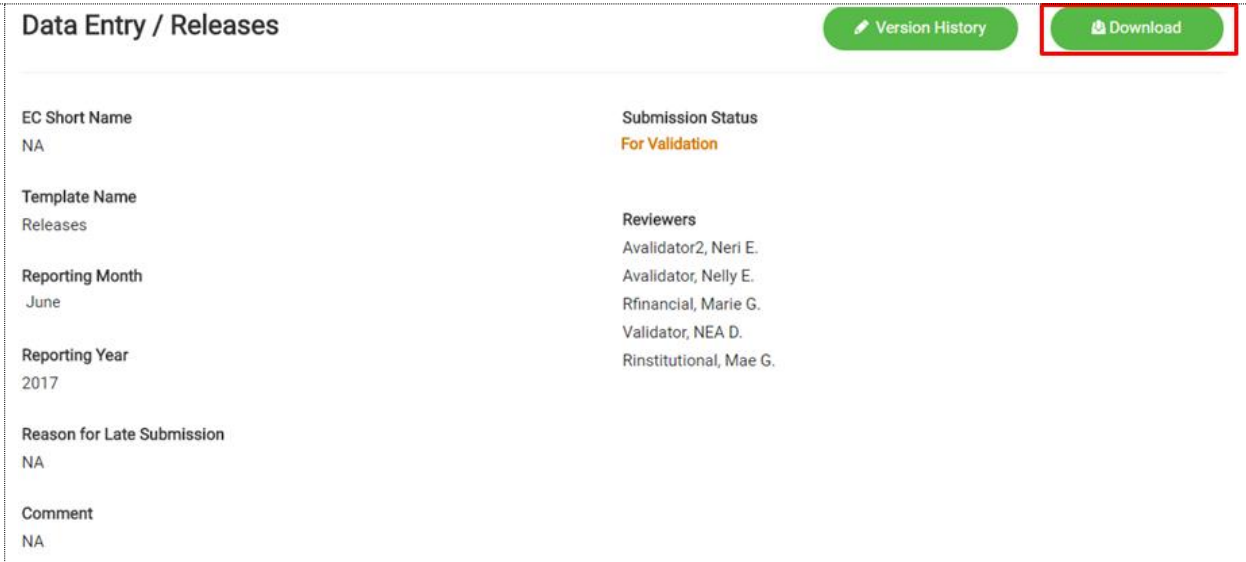
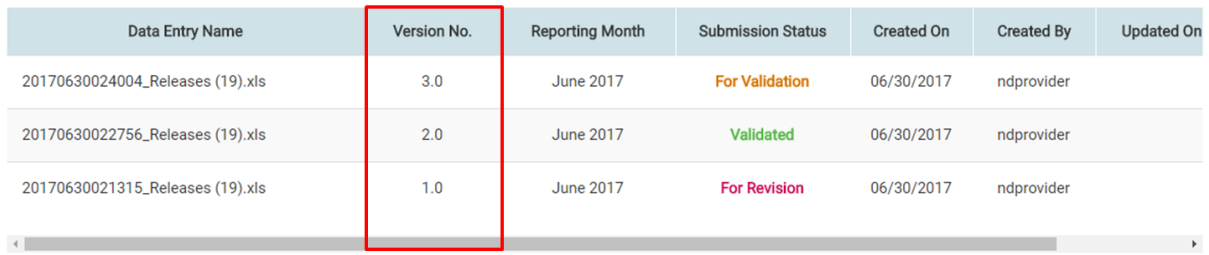
3. System will display the *Data Entry* details page.

4. From the *Data Entry* details page, click **Version History** button.




5. System will display the history of submissions for the DET.

System assigns an incremented version for every submission.





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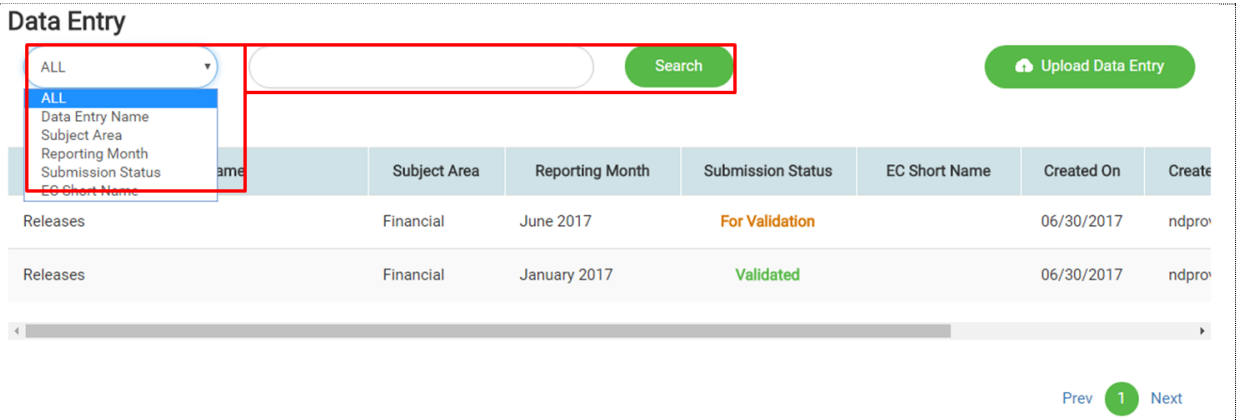
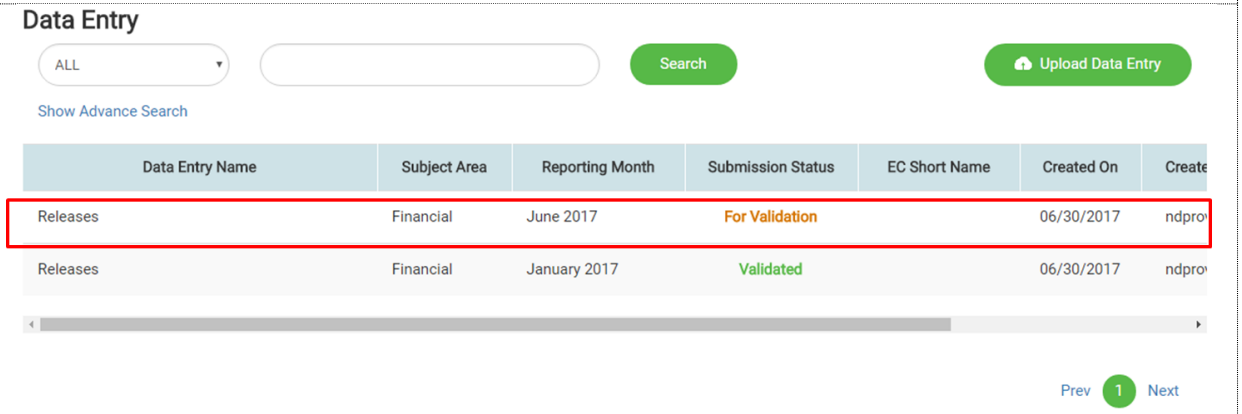
### 5.2.6 Download Data Entry

| | |
|---|---|
| 1. From the *Data Entry* list, search the DET to be downloaded. |  |
| 2. Click desired DET from the Data Entry list. |  |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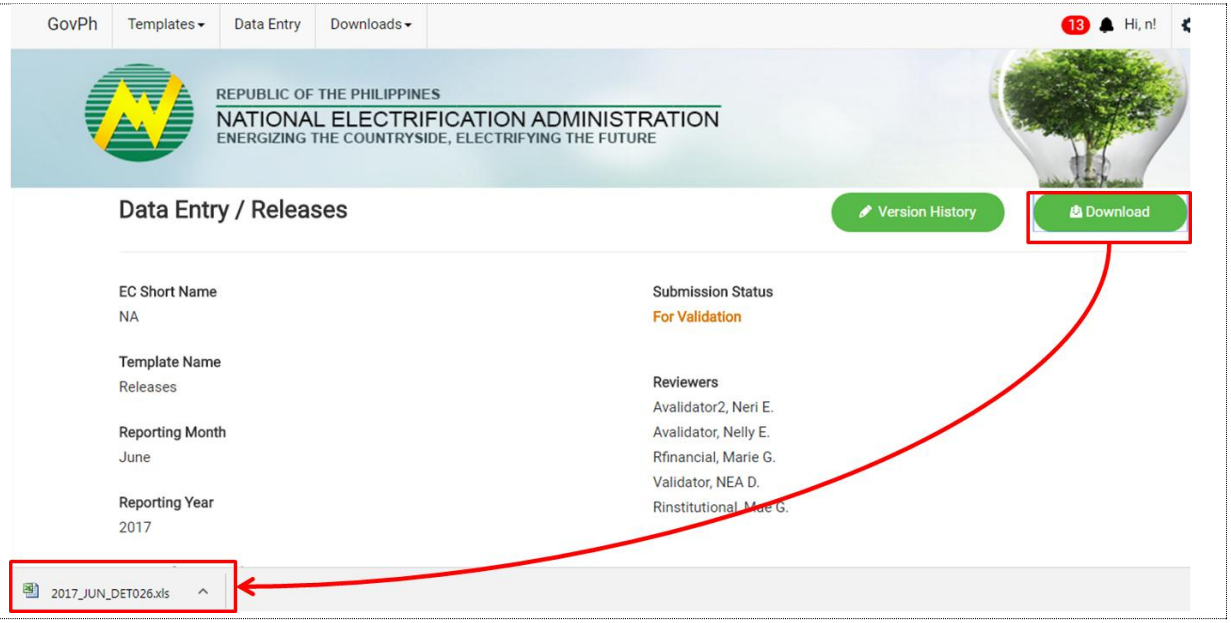
3. System will display the *Data Entry* details page.

4. From the *Data Entry* details page, click **Download** button to download the DET.

   DET file is in excel format.

5. Click the DET file to open it.





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# REPORTS VIEWING

NEA Web Portal

INDRA Philippines, Inc.

July 2017


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# 6 REPORTS VIEWING

Reports are can be accessed in the NEA Web Portal and SQL Server Reporting Services (SSRS) Reports Portal. The succeeding sections will discuss how to navigate these systems separately.


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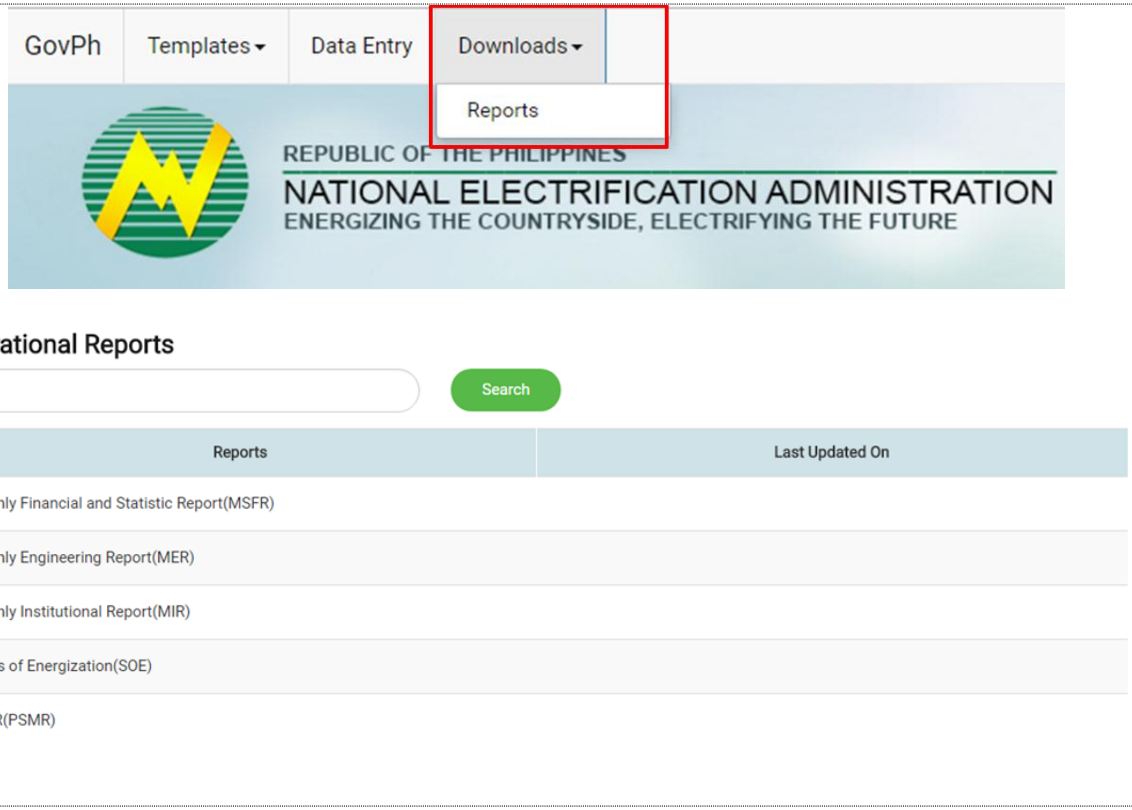
## 6.1 Reports Viewing in the NEA Web Portal

1. Select **Download > Reports** from the Menu tab.
2. *Reports list* will be displayed.





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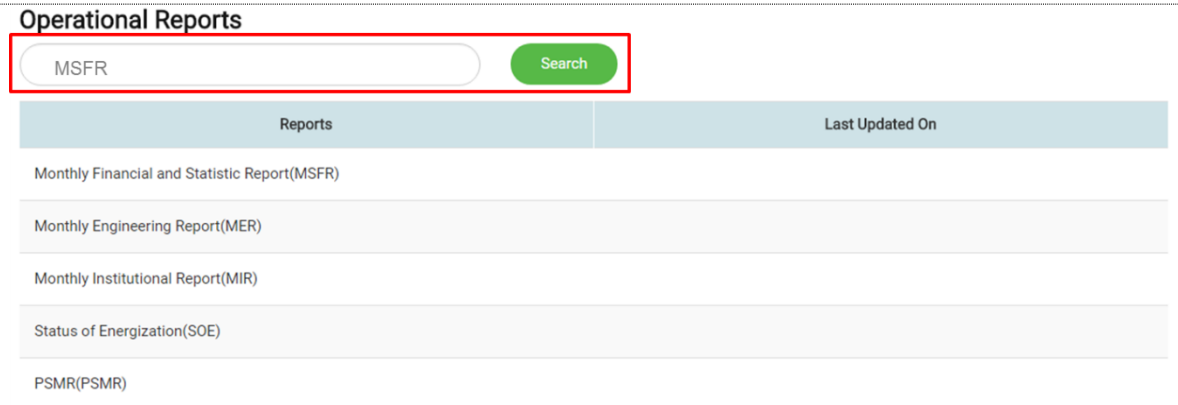
### 6.1.1 Search Report

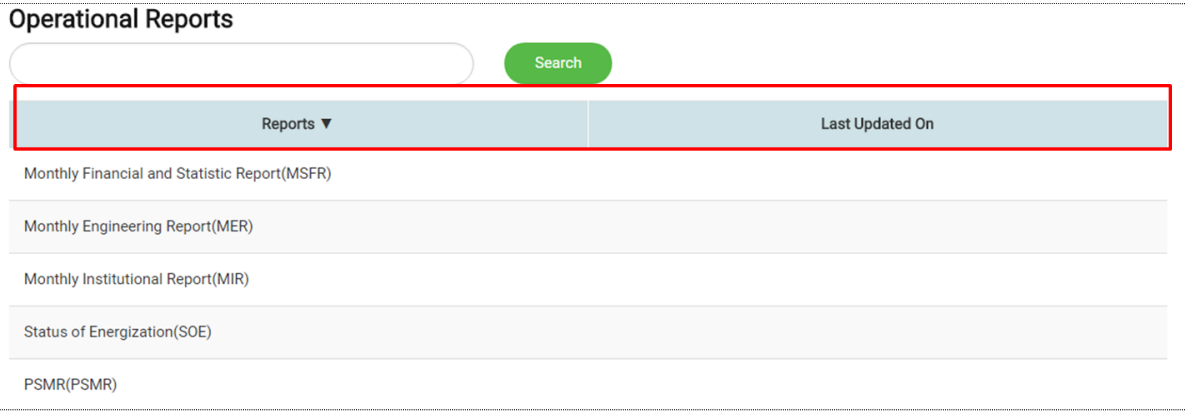
1. From the *Reports* list, enter keyword.
2. Click **Search** button.




### 6.1.2 Sort Search Results

1. From the *Reports* list screen, click a column header to sort list.
   - Reports, Last Updated On

Sorting rearranges the entries alphabetically A-Z or Z-A. Click to sort again in the reverse order.





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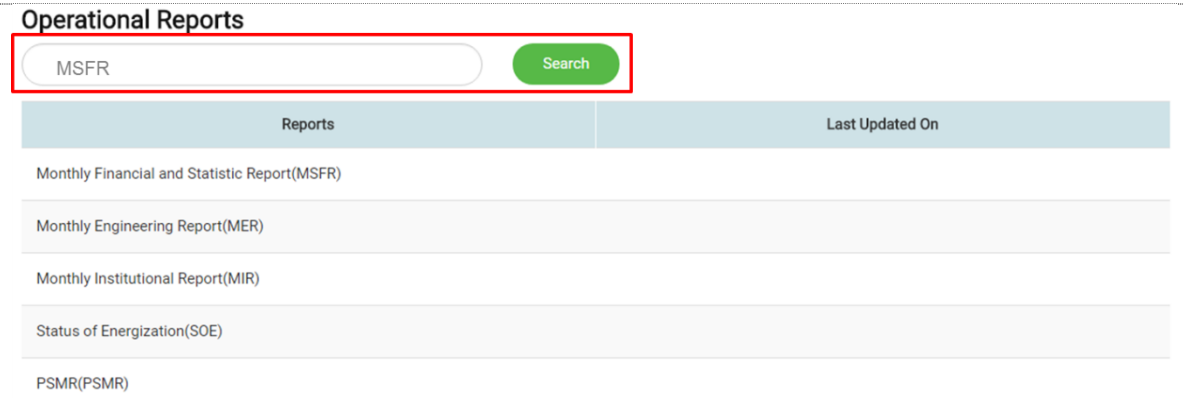
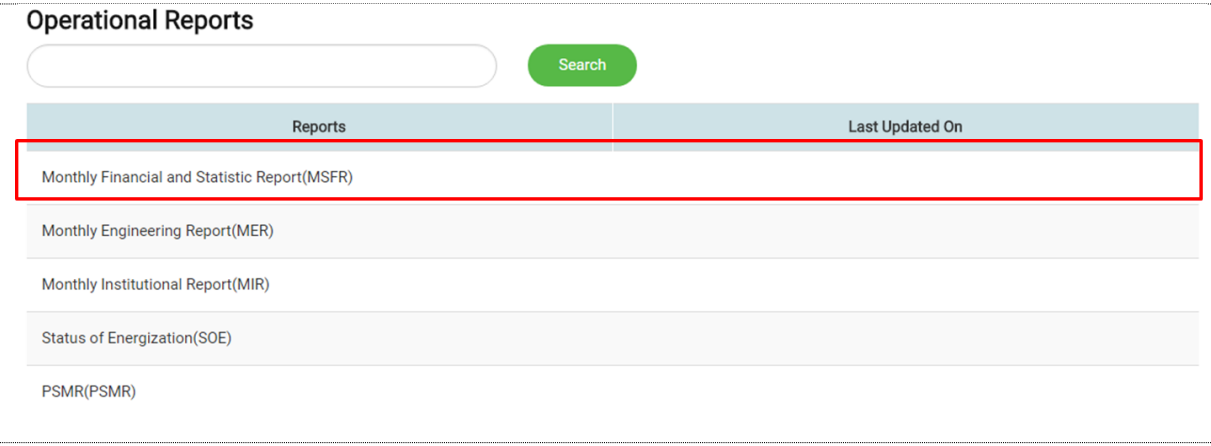
### 6.1.3 Download Report

| | |
|---|---|
| 1. From the *Reports* list, search the report. |  |
| 2. From the Reports list, select the desired Report. |  |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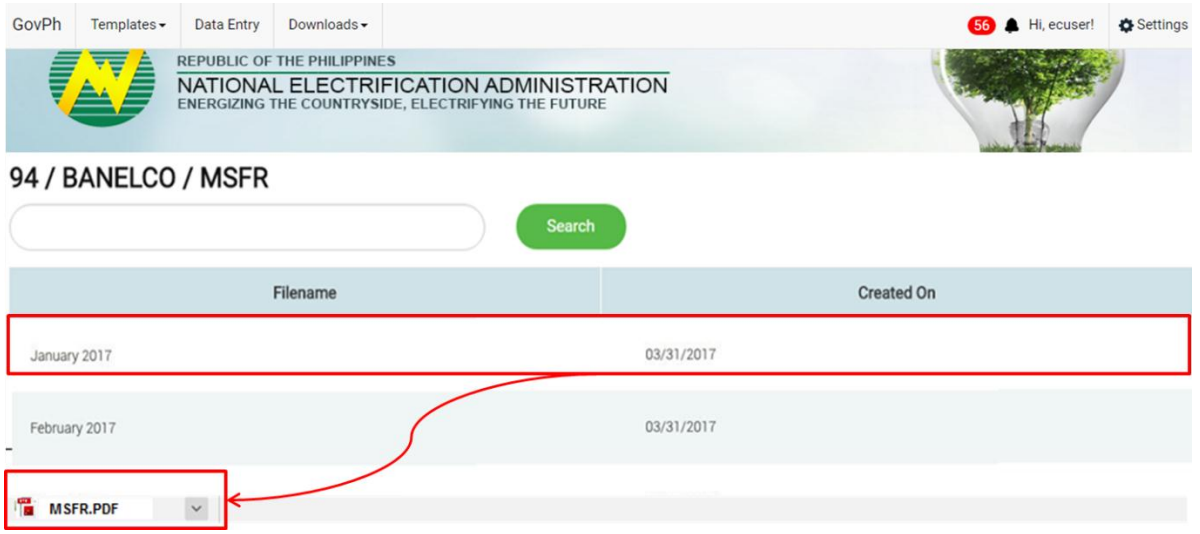
3. System will display the list of generated reports.

4. Click the filename to download the report.

   Report will be in PDF format.

5. Click the PDF file to open it.





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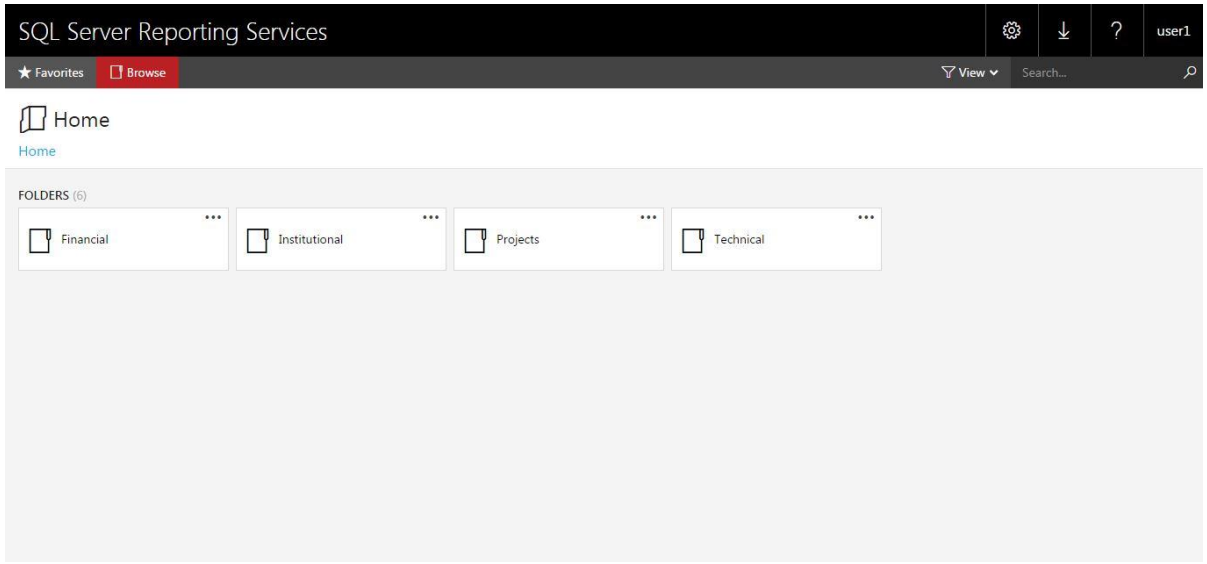
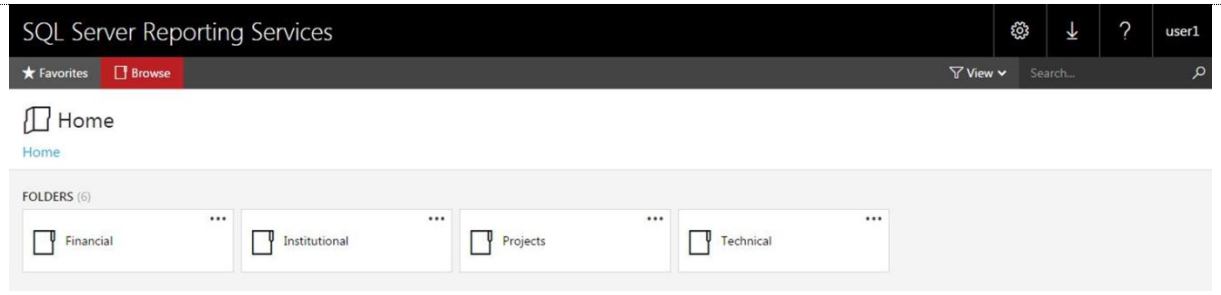
## 6.2 Reports Viewing in SSRS

| | |
|---|---|
| 1. In the SSRS Home Page, the different **Subject Areas** are displayed in separate folders. |  |
| 2. In each Subject Area folder, there are 2 subfolders:<br>• Analytical Views<br>• Operational Reports |  |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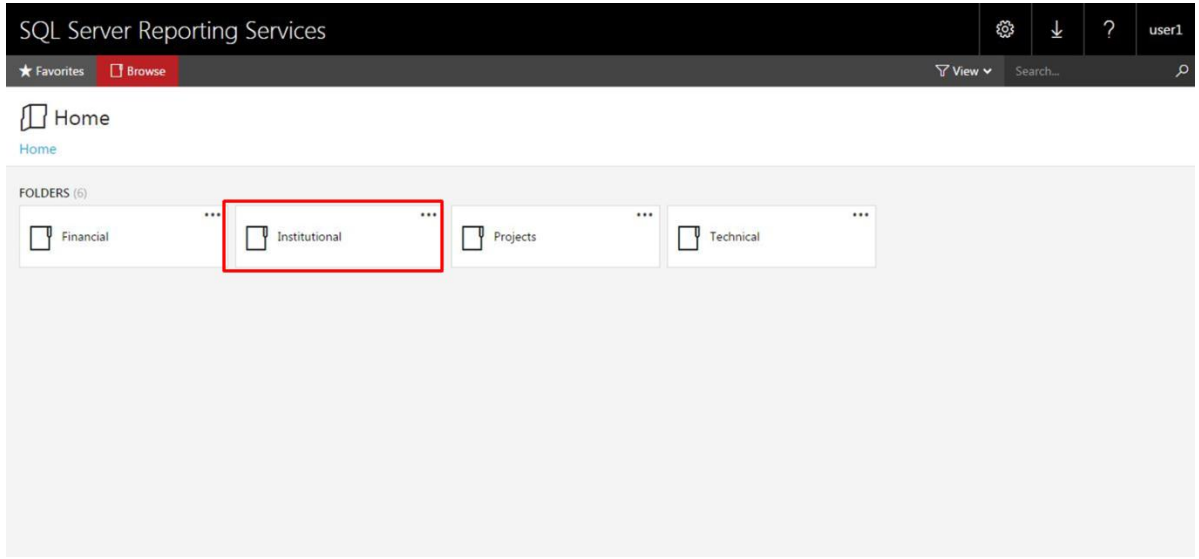
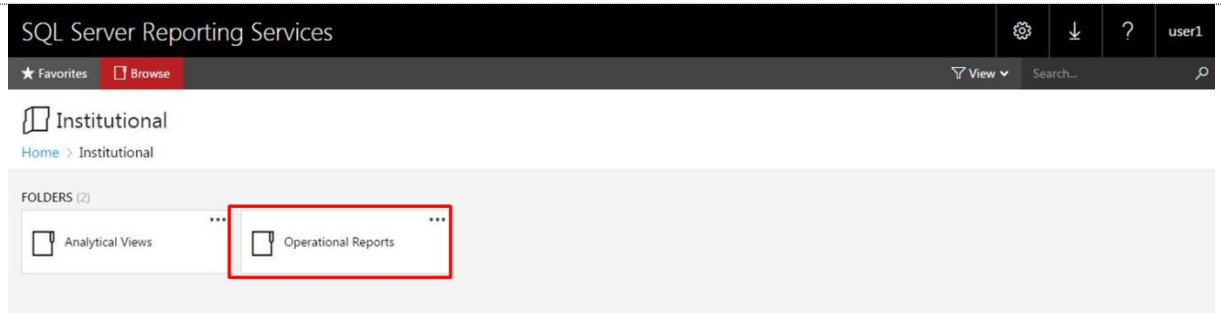
### 6.2.1 View Operational Report

| | |
|---|---|
| 1. Select the **Subject Area** of the report to be viewed. |  |
| 2. Select **Operational Reports** folder. |  |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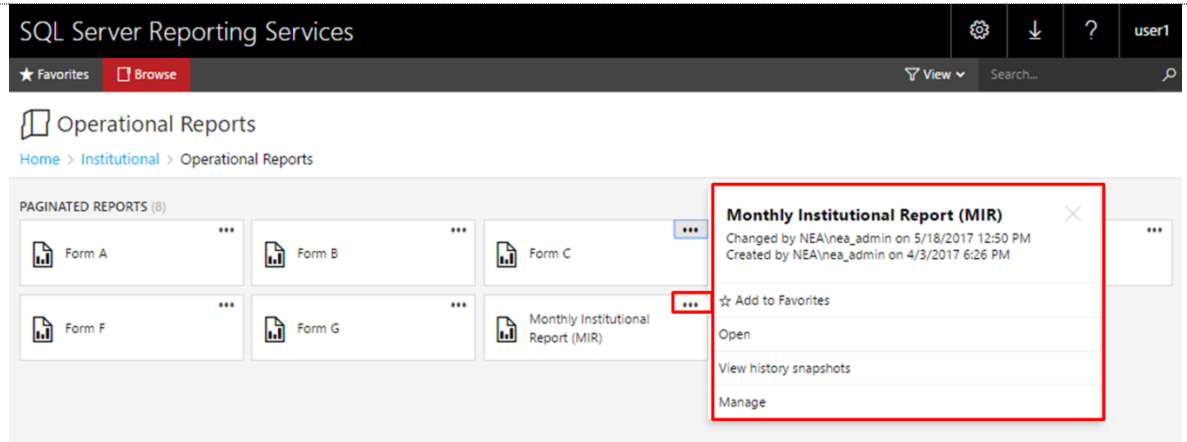
3. Reports in the subject area are displayed in tiles view.

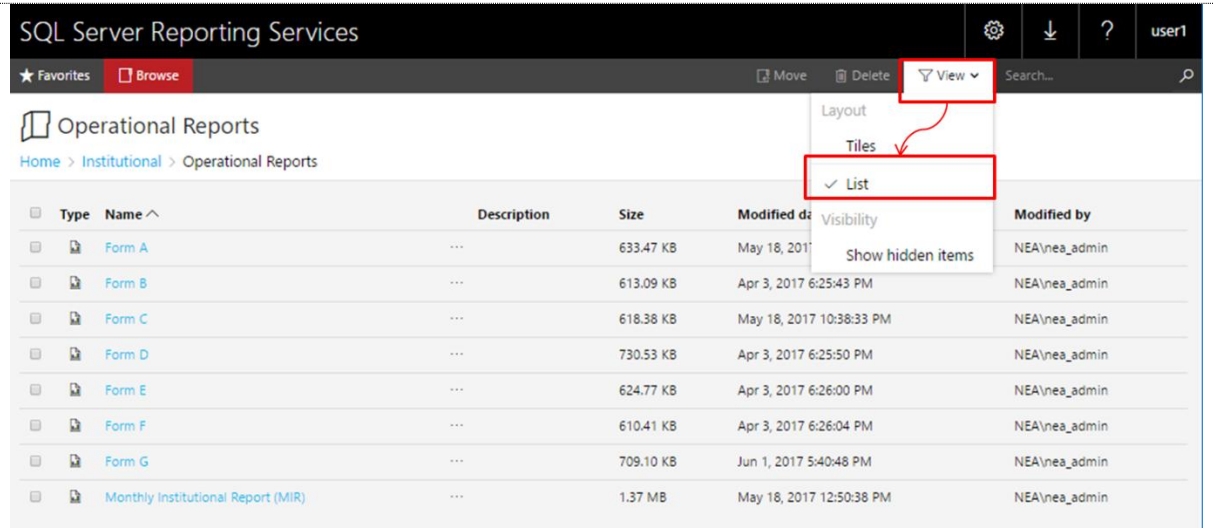
Click options to view details of the report and other options.

.




To show the reports in list view, click **View > List**.

- List view will show file properties (e.g. Modified date, Modified by, etc.)





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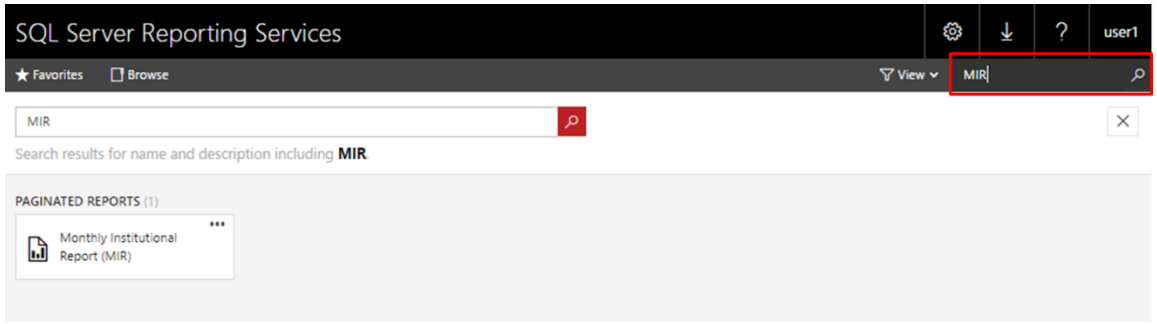
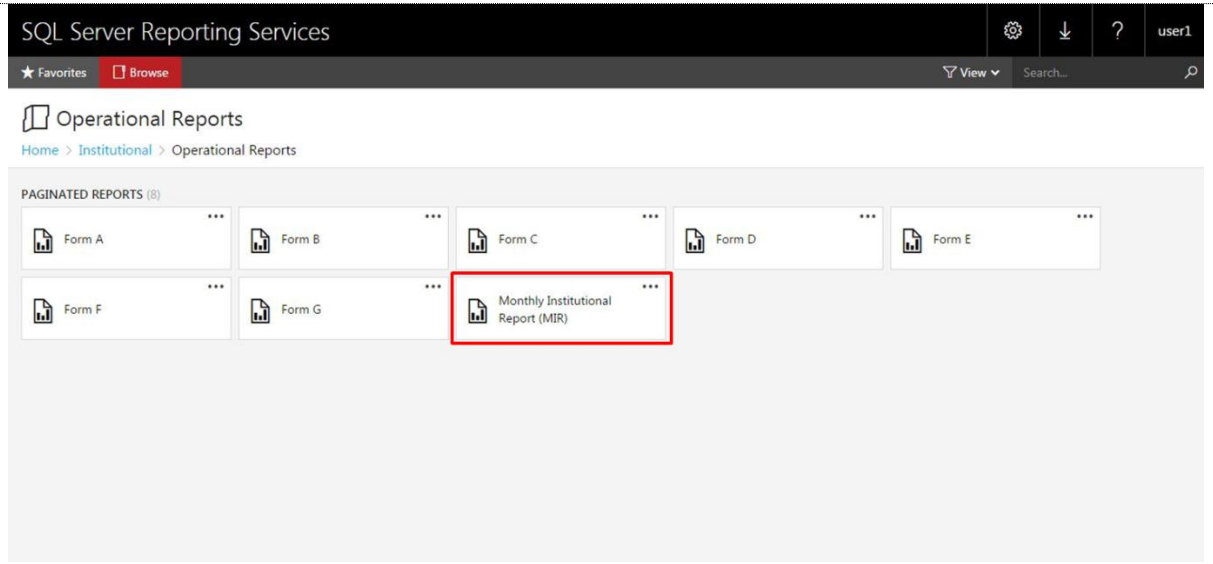
| | |
|---|---|
| To search a specific report, enter the report name in the search engine.<br>• Reports that matched the search criteria will be displayed |  |
| 4. Click the desired report to view. |  |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5. System will display the filters predefined for the report.

6. Select filter (e.g., Reporting Year and Month, EC, etc.).

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| | |
|---|---|
| 7. Click **View Report** button. | |


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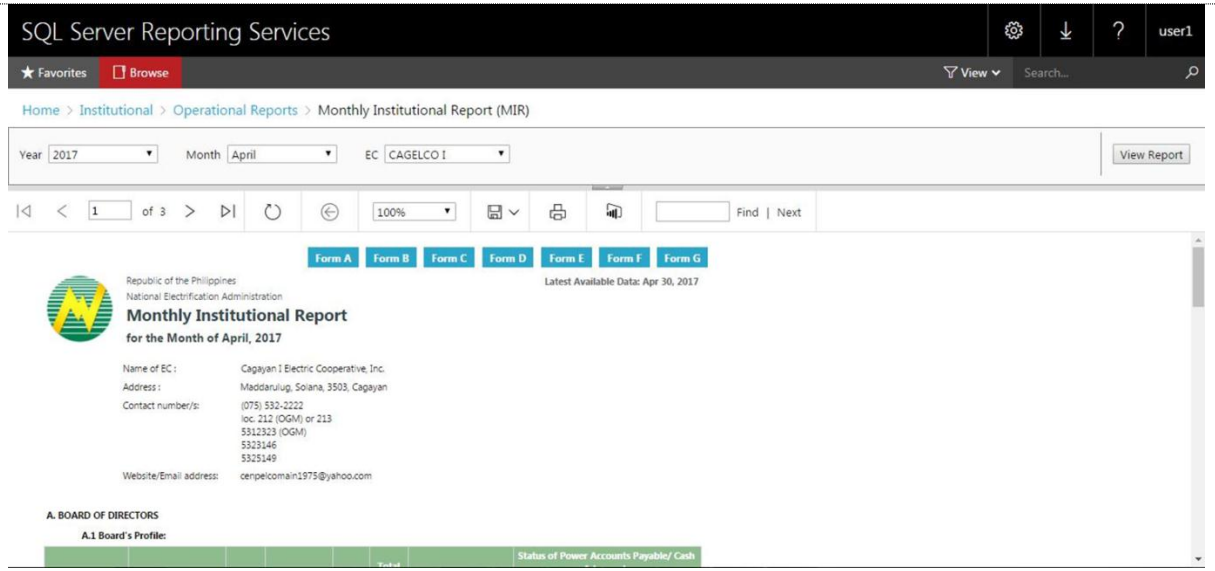
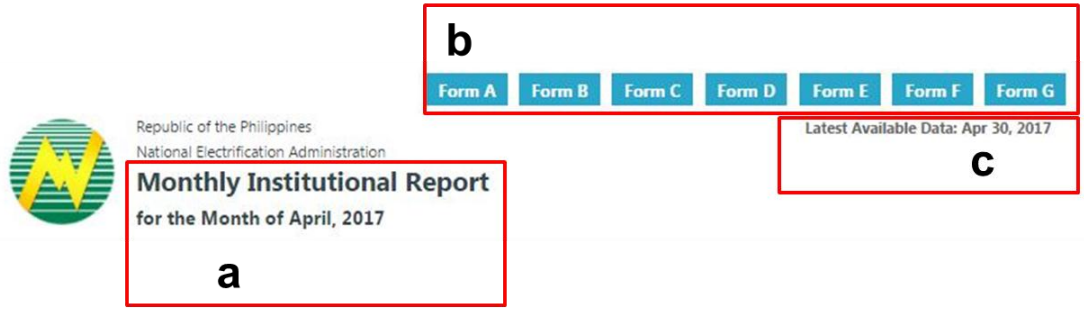
8. System will display the report.




**REPORT PARTS: HEADER**

a. Title and Subtitle
   - Displays information about the report
b. Navigation Tabs
   - Navigate to other related reports
c. Timestamp
   - Displays when the data is last updated





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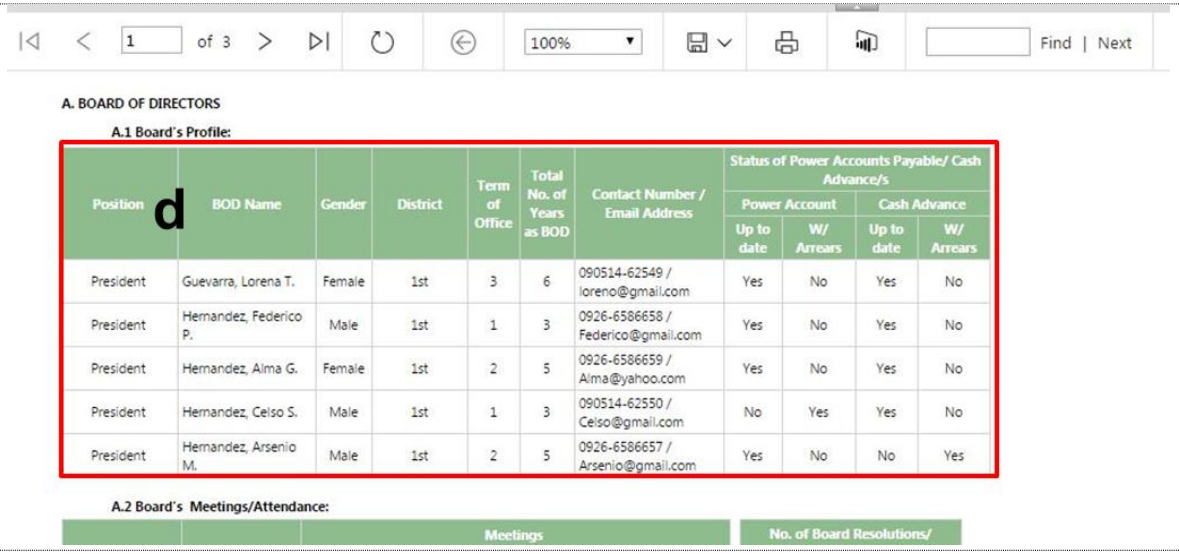
**REPORT PARTS: BODY**

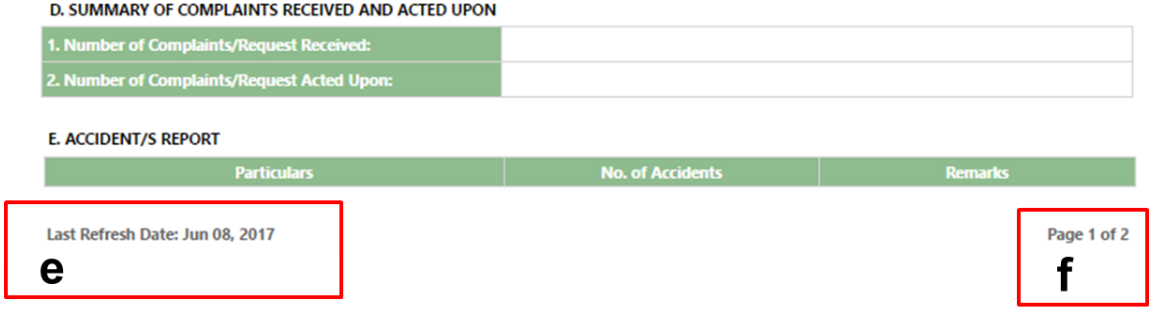
d. Table
- Consists of column and row headers and the actual data




**REPORT PARTS: FOOTER**

e. Timestamp
- Displays when the report is last refreshed

f. Pagination
- Displays the page number





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**NAVIGATION GUIDE**

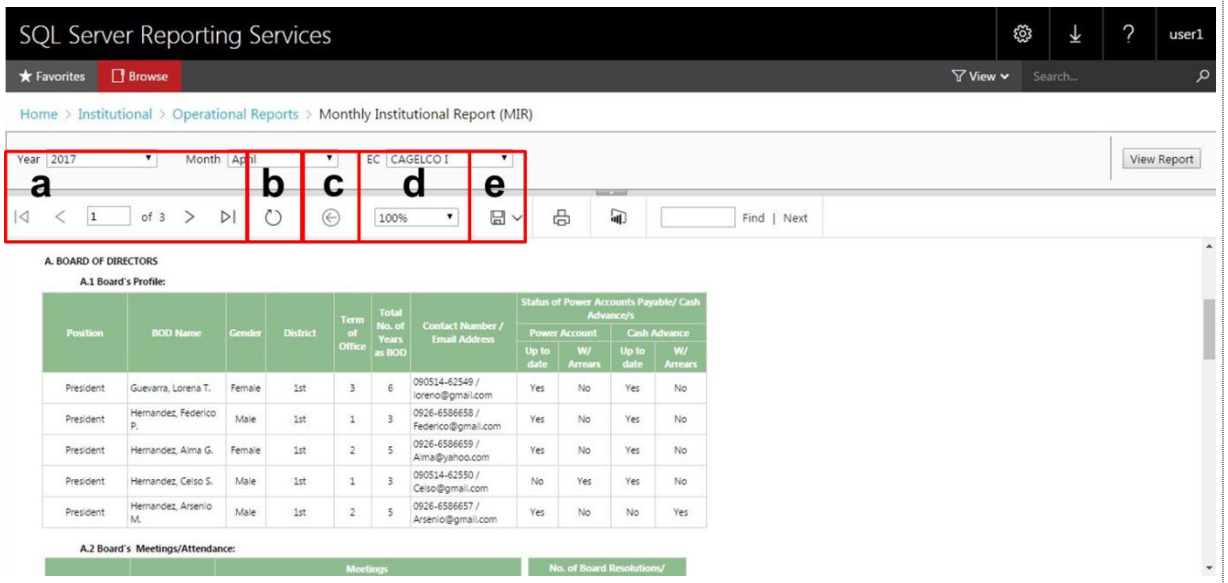
a. Page navigation
   - View next page or previous page
   - View first or last page

b. Click Refresh icon to refresh report

c. Click Back icon to go back to the parent report

d. Click to zoom in or zoom out the report view

e. Save icon
   - Download as PDF
   - Saving of file is per tab





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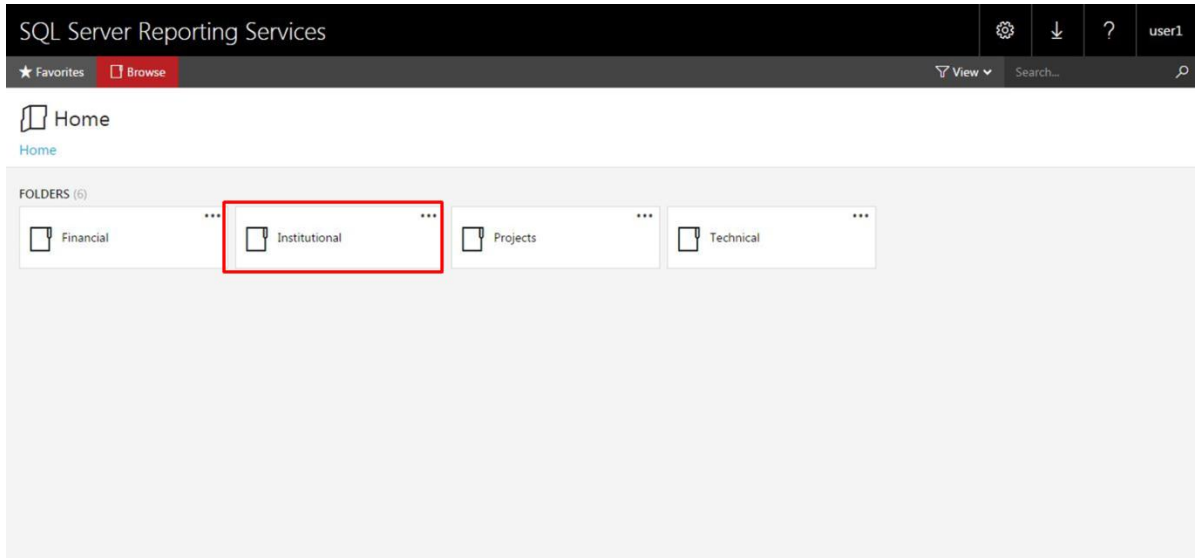
### 6.2.2 Analytical View

| | |
|---|---|
| 1. Select the **Subject Area** of the report to be viewed. |  |
| 2. Select **Analytical Views** folder. | |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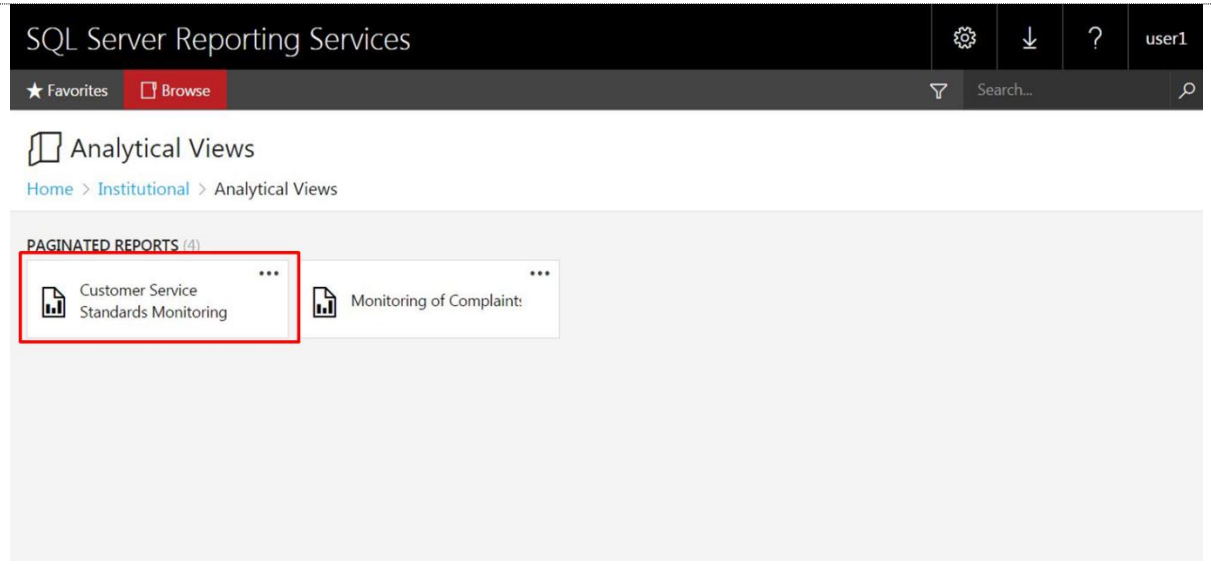
3. Click an Analytical Report to view.
.





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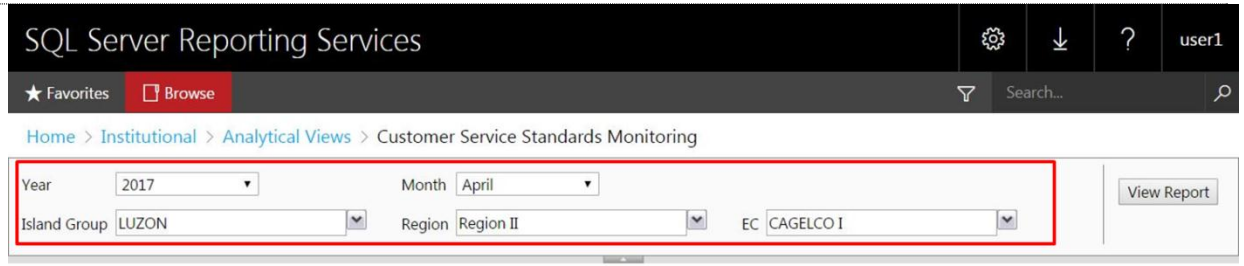
4. System will display the filters predefined for the report.

5. Select filter (e.g., Reporting Year and Month, Region, EC, etc.)





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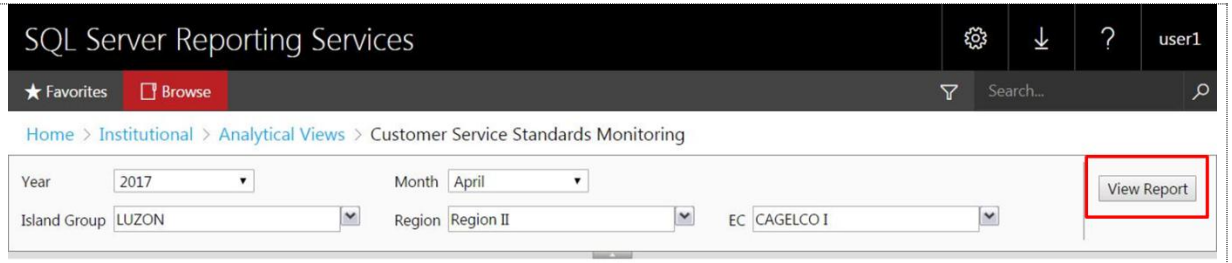
| | |
|---|---|
| 6. Click **View Report** button. |  |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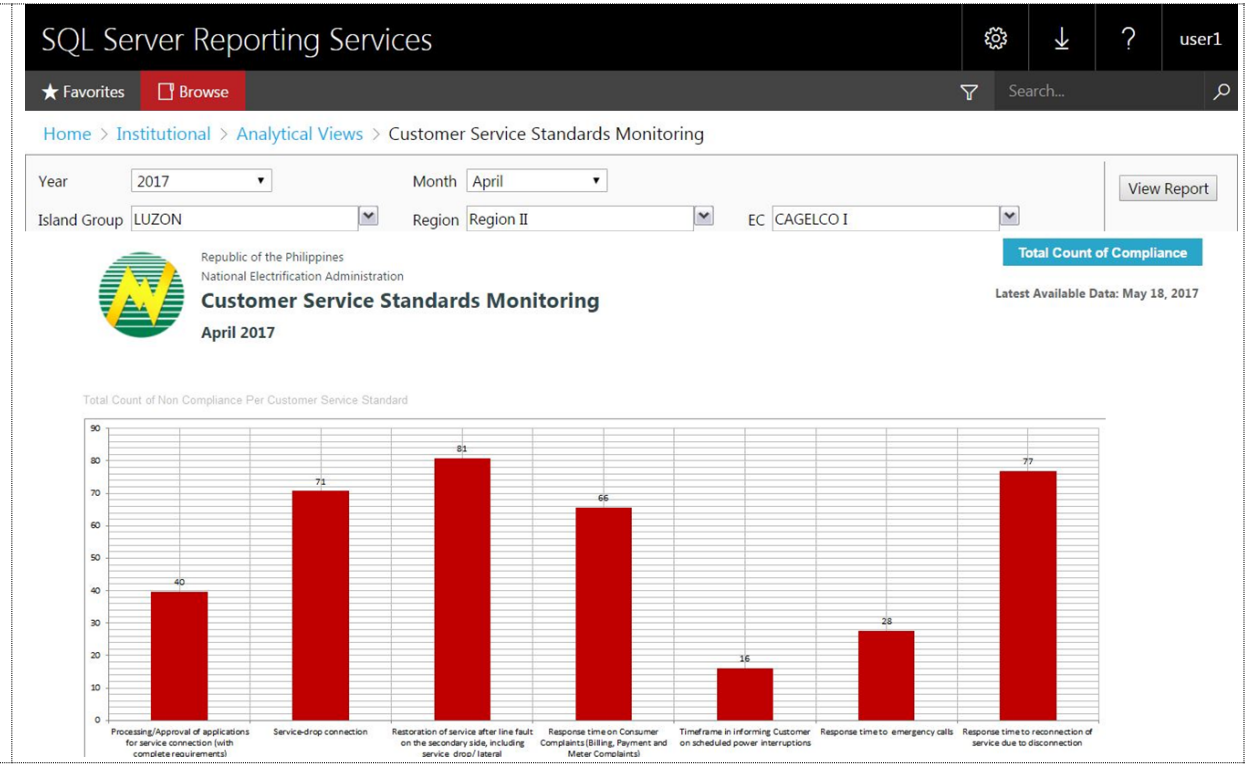
7. System will display the Analytical View.





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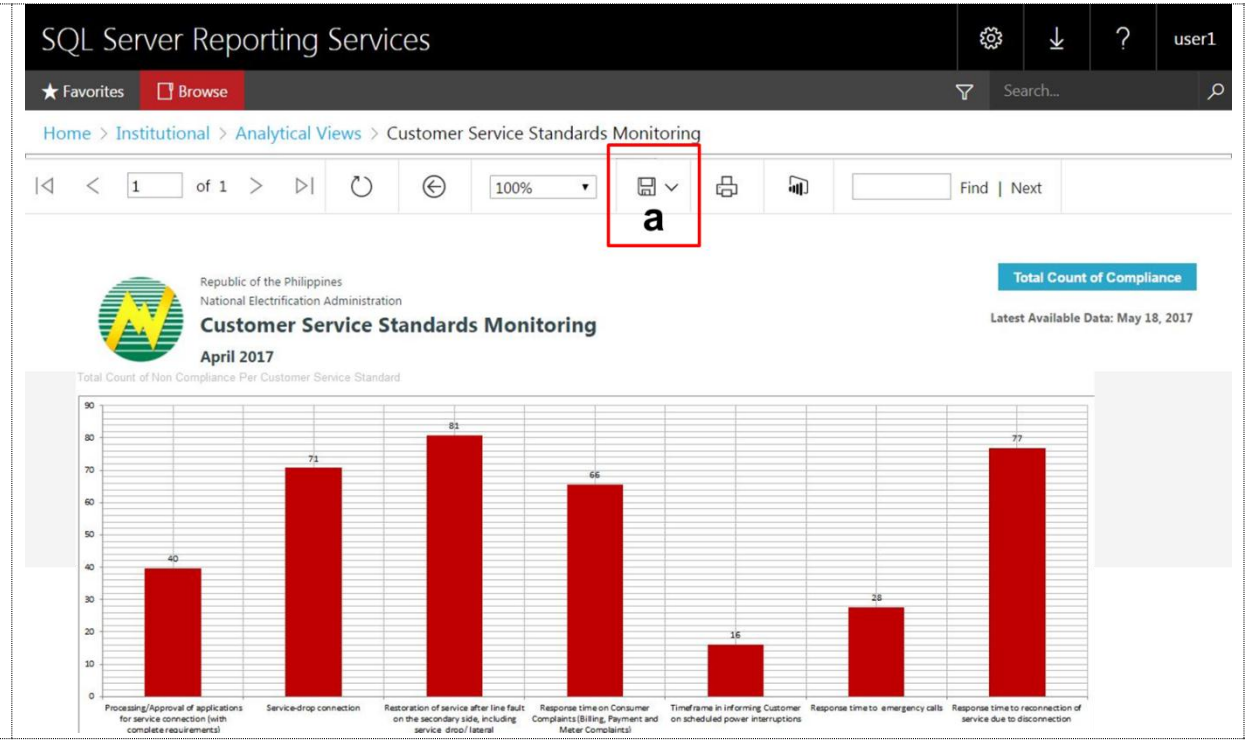
**NAVIGATION GUIDE**

a. Save icon
   - Download as PDF

   Saving of file is per tab





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