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Review / Revision History			
Revision No.	Date	Description	Approved By
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1.0 OBJECTIVE

This end-user manual aims to assist EC Users with the NEA Web Portal system functionalities. Specifically, it provides EC users the steps on how to navigate the NEA Web Portal to properly execute the EC User role.

2.0 SCOPE

This manual covers the NEA Web Portal system guide and system navigation for EC User.

3.0 DEFINITION OF TERMS

Acknowledge Receipt [1]	-	Status of the DET when a DET is successfully received by the NEA DET Reviewer.
Button	-	It is an object normally seen as icon or text which does a desired function in the system when clicked.
Data Entry Template (DET)	-	Input Templates used to fill out information and submitted by the ECs to the Web Portal for NEA acknowledgement and reports generation. These templates serve as inputs in the generation of reports.
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.
EC Profile	-	Master Data that contains the data profiling of the ECs.
Field	-	It is the space where information is filled in. Each field is differentiated by field names.
For Revision	-	Status of a DET when revision is needed after checking the completeness of the data by the NEA DET Reviewer.
Geography	-	Master Data that contains EC franchise area data on island group, region, province, barangay/city, and

[1] There is recognition of the possibility of change in the status from "Validated" to "Acknowledge Receipt".

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sitio/purok.

Hyperlink	-	A text that is usually changes format when the pointer is being hovered over, and re-directs to another page or displays a section when clicked.
Master Data (MD)	-	Data representing standard business information which are common and shared across users and managed centrally at NEA. These can be modified as requested by the Users for the addition of new values, updating or revisions and deactivation.
NEA Web Portal	-	The centralized repository of data that enables ECs to submit the accomplished DETs for data warehouse processing and for the generation of Operational Reports.
Operational Reports (ORs)	-	Reports required by NEA as mandated by RA 10531 or other operational information which are generated as outputs after collecting data from the ECs through the DETs.
RA 10531	-	An act strengthening the National Electrification Administration, further amending for the purpose Presidential Decree No. 269, as amended, otherwise known as the "National Electrification Administration" decree.
Reporting Date	-	The date of DET submission.
Reporting Month	-	The month covered by the data being reported. This is the data for the month earlier than the current month (Month X – 1).
Request	-	A formal request for service, information or change in the NEA BIT functionalities made through Helpdesk Support.
Subject Area	-	Composed of Finance, Institutional, Technical, and Projects groups classifying the ownership.
Submitted [2]	-	Status of the DET when it is successfully submitted in the NEA Web Portal by the EC.

[2] There is recognition of the possibility of change in the status from "For Validation" to "Submitted".

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Substation	-	Master Data that contains the information of the Substation of the ECs.
System Prompt	-	A message or symbol used to represent the system's readiness to perform the next command.

4.0 ROLES AND RESPONSIBILITIES

Electric Cooperatives (ECs)	-	Responsible for accomplishing, submitting, revising, and resubmitting of DETs. Also accountable for the correctness and accuracy of the submitted data through the DETs.
Helpdesk Support	-	Responsible for receiving and assessing the information on reported incident and request Helpdesk tickets.
Master Data (MD) Manager	-	Responsible for maintaining assigned Master Data in the NEA Web Portal. May also acknowledge EC submissions and has access to operational reports, as assigned.
NEA DET Reviewers	-	Responsible for acknowledging/ reviewing the submitted DETs by the ECs.

5.0 REFERENCES

5.1.1 System Procedure on the Implementation of the National Electrification Administration Business Intelligence Technology (NEA BIT)

5.1.2 NEA BIT Go-Live Kit

5.1.3 NEA BIT Support Process

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6.0 SYSTEM GUIDE

This section presents the system requirements to run the NEA Web Portal and the elements of its user interface that enable the execution of commands in the system.

6.1 System Requirements

6.1.1 Access to NEA Web Portal

1. NEA Web Portal is a web-based facility with a need to use a standard internet browser. The NEA Web Portal URL is https://nea.trafficmanager.net. Below are the necessary software needed in your computer to be able to use the NEA Web Portal:

   - Web Browser (Recommended: Google Chrome)

   - Microsoft Excel 2003-2010

   - PDF Reader

2. Certification import is required prior to accessing the NEA Web Portal for the first time. Refer to *NEA BIT Go-Live Kit - Certificate Import Guide* for reference.

6.2 System User Interface

Access to NEA Web Portal functionalities seen in the home page depend on the User's role assignment. Some features may not be visible due to user role restriction.

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6.2.1 Log In Page

Object Name	Object Number	Description
User Credentials	1	It is the unique security access details used to log into the system.
Log In button	2	It is a button that lets the user enter the system.
Reset Password	3	It is the link where the user can change its password.

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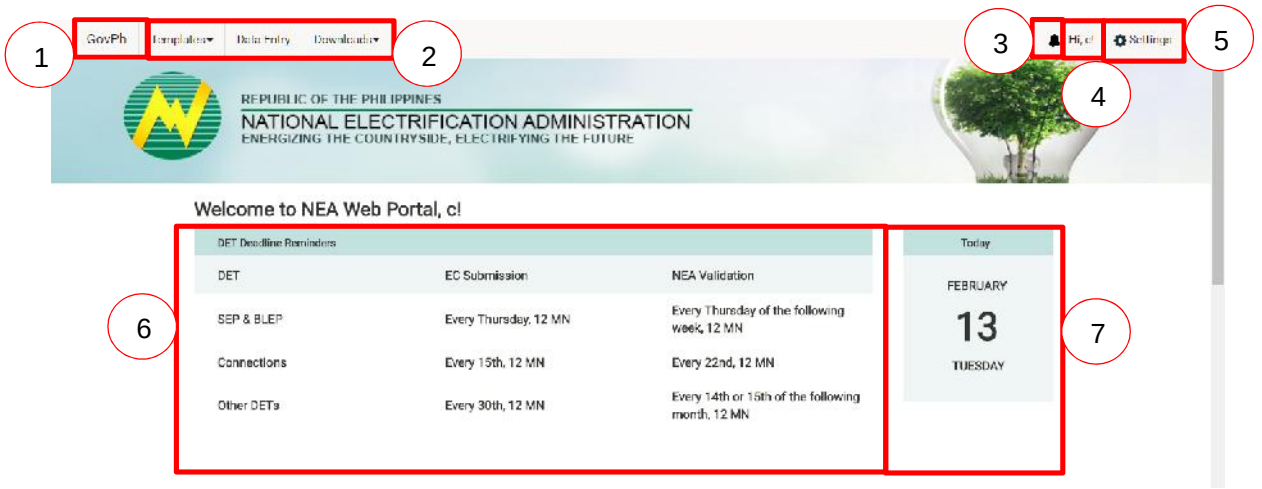
6.2.2 Home Page



Object Name	Object Number	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	3	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	4	It is a link to the Home Page.
Settings tab	5	It is used for user profile update and log-out.
Reminders	6	A section used to display reminders for the user.
Calendar	7	It shows the current date.

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6.3 System Navigation Guide

What do I want to do?	What do I use?
Manager User Accounts	This can be done through **Settings** tab.
Update EC Profile	This can be done through the **EC Profile** menu tab.
Download DET Template	This can be done through the **Templates** menu tab.
Upload accomplished DET	This can be done through the **Data Entry** menu tab.
View selected Operational Reports	This can be done through the **Download > Reports** menu tab.
View All Notifications	This can be through **Notifications** link.

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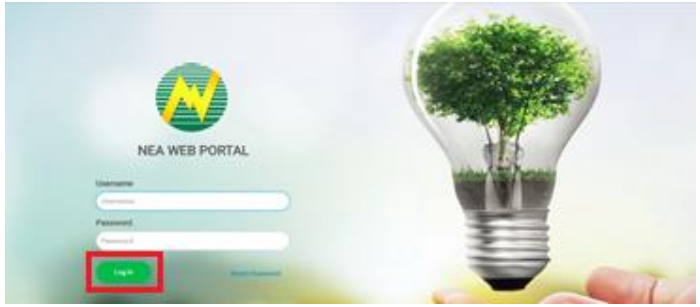
6.4 User Account Management

6.4.1 Log In

System Details	System Screen/ Button
Each user will be given a unique *Username* and a *Password* that will be used to log into the system by the Helpdesk Support. 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. Click on the **Log In** button or press the *ENTER* key on the keyboard.	
If the *Username* or *Password* is incorrect, an error message will appear on the screen. • *Username* and *Password* are case sensitive. • After logging in for the first time, change the *Password* immediately to a unique user-defined *Password*. (See Section 6*.4.3 Update Password* for details.)	

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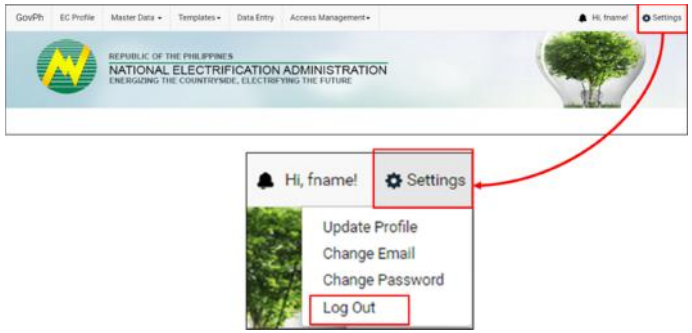
6.4.2 Log Out

System Details	System Screen/ Button
This sub-section illustrates how to log out of the system: 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 *Log In* screen. **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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6.4.3 Update Password

System Details	System Screen/ Button
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. <u>Password Policy:</u> • Password is case sensitive. • Password must be at least 8 characters. • Password must be updated every 6 months.	

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• You cannot reuse password of the previous ten times. • Password should be a combination of alphanumeric and special characters. 5. Re-type the new password in the *Confirm New Password* box. 6. After filling out the mandatory fields, click **Save** button.	
An error message will appear if the following errors are encountered: • Old Password is incorrect. • "New Password" and "Confirm New Password" do not match. • New password format is incorrect. Click **OK** button to go back to the *Update Password* screen.	

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7. Click **Yes** button on the system prompt to confirm new password.	
8. Click **OK** button on the system prompt. User will be re-directed to the *Home Page*.	

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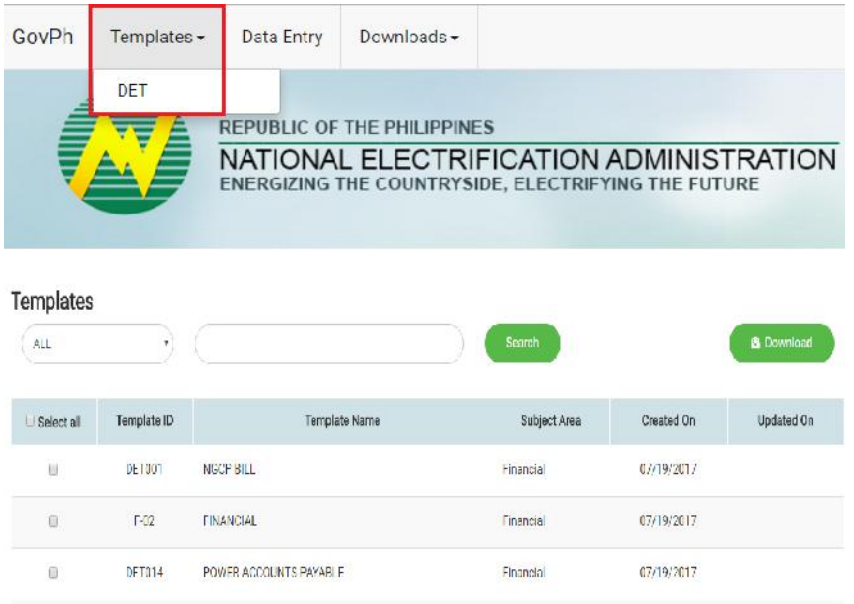
7.0 NEA Web Portal Navigation for EC User

This section shall guide the EC Users in navigating the Templates, Data Entry, and Downloads modules to be able to download and upload the Data Entry Templates (DETs), and view and download generated Operational Reports.

7.1 Templates Menu Tab

System Details	System Screen/ Button
1. Select **Templates > DET** from the Menu tab. 2. *Templates list* will be displayed.	

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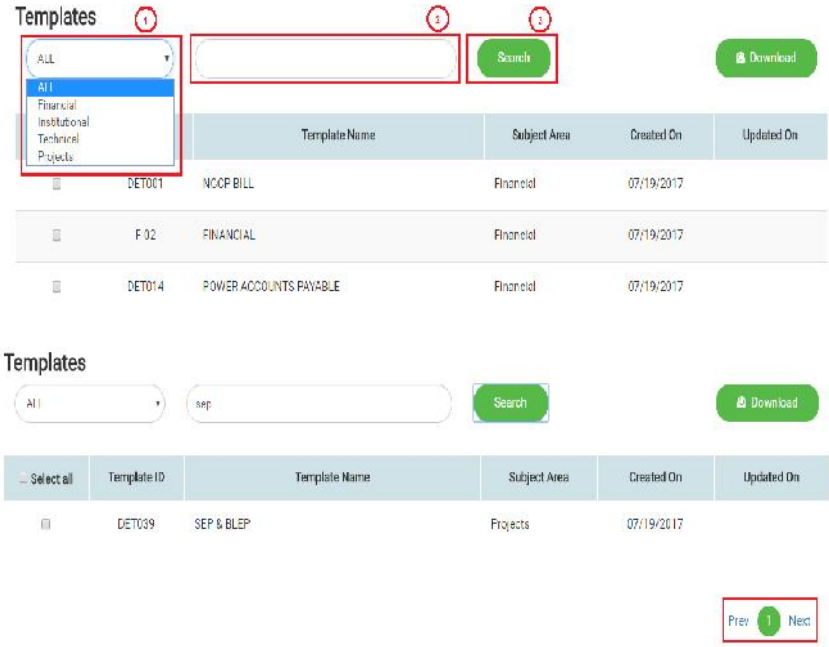
7.1.1 Search a Template

System Details	System Screen/ Button
1. From the *Template list*, select Filter. • ALL • Financial • Institutional • Technical • Projects 2. Enter *keyword*. 3. Click **Search** button. 4. Click **Previous** or **Next** button to view search results in other pages.	

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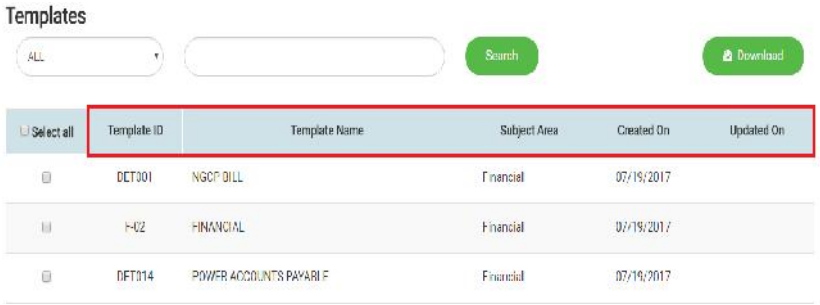
7.1.2 Sort Search Result

System Details	System Screen/ Button
1. From the *Template list*, click *Column Header* of the column to be sorted. • Template ID • Template Name • Subject Area • Created On • Updated On Sorting rearranges the entries alphabetically A-Z or Z-A. Click to *sort* again in the reverse order.	

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7.1.3 Download Template

System Details	System Screen/ Button
1. From the *Template list*, user may opt to: a. Download a single template by ticking the check box of the desired template, if a single template is to be downloaded. b. Download multiple templates by ticking several check boxes. c. Download all templates by ticking the Select all check box. 2. Click the **Download** button	

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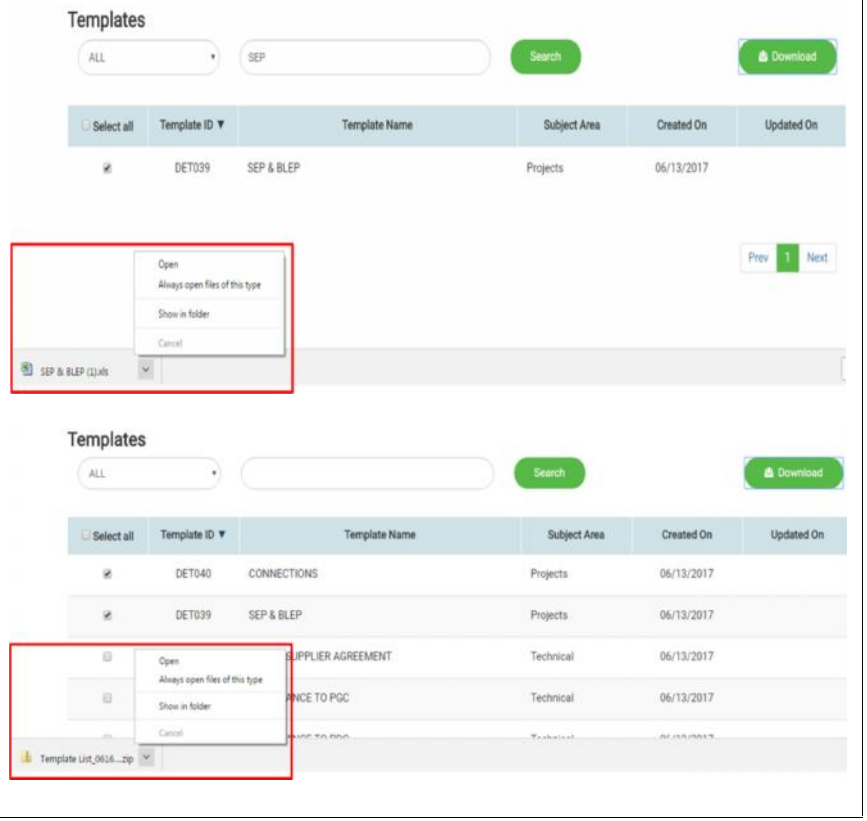
3. **DET Template** will be downloaded in an excel format.

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.
- File will be automatically saved to your local folder when using Chrome browser. Other browsers may require you to specify the folder destination.



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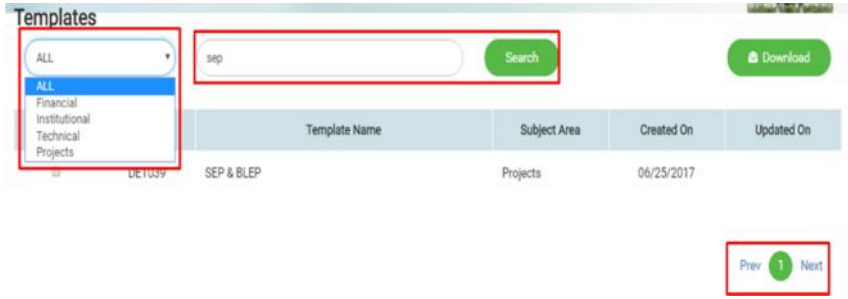
7.1.4 View Template Details

System Details	System Screen/ Button
1. Search desired template. 2. From the *Templates list* search screen, select **filter** (*optional*). • ALL • Financial • Institutional • Technical • Projects 3. Enter **keyword** in the Keyword box. 4. Click **Search** button 5. Click **Previous** or **Next** button to view search results in other pages..	

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6. Click desired **Template** from the *Templates list*.	
7. System will display the *Template* details page. 8. From the *Template details* page, click **Download** button.	

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7.2 Data Entry Menu Tab

System Details	System Screen/ Button
1. Select **Data Entry** from the Menu tab. 2. *Data Entry list* will be displayed.	

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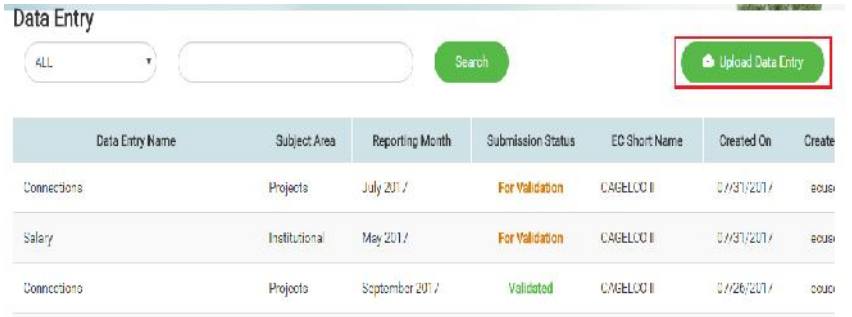
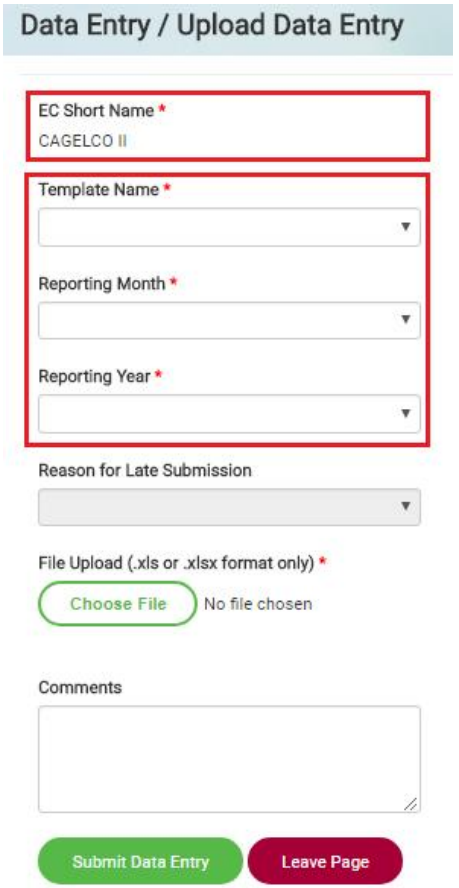
7.2.1 Upload Data Entry

System Details	System Screen/ Button
1. From the *Data Entry* search screen, click **Upload Data Entry** button.	

2. In the *Data Entry/Upload Data Entry screen*, fill-out required fields:

- Template Name
- Reporting Month
- Reporting Year

Fields with asterisk (*) are required to be filled-out.
EC Short Name is automatically populated.



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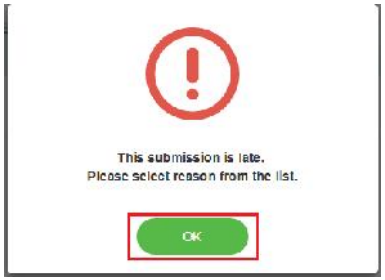
FOR LATE SUBMISSION

The Web Portal is able to identify a late submission based on the Reporting Month and Year entered by the user.

- If DET is identified late, system will display a *prompt* for late submission.
- Click **OK** button on the prompt.



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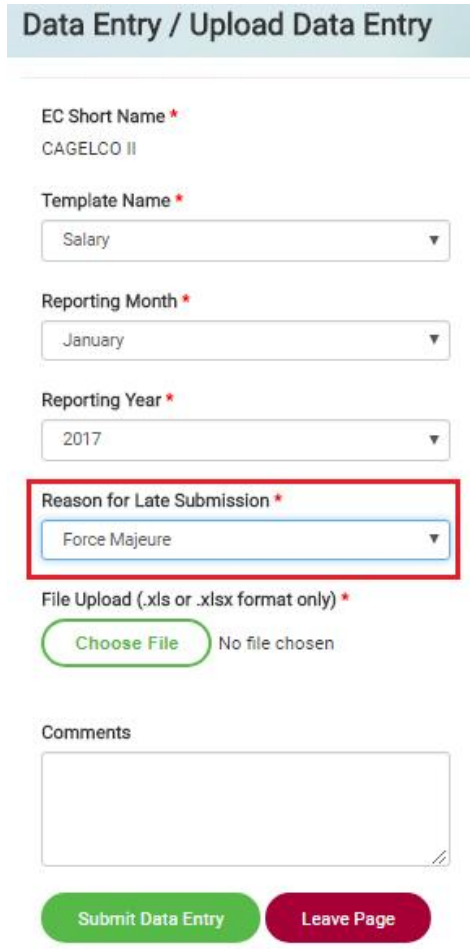
- **Reason for Late Submission** field will be enabled and is required to be filled out.

- Select value from the **Reason for Late Submission** field. Options:
  a. Force Majeure
  b. Others



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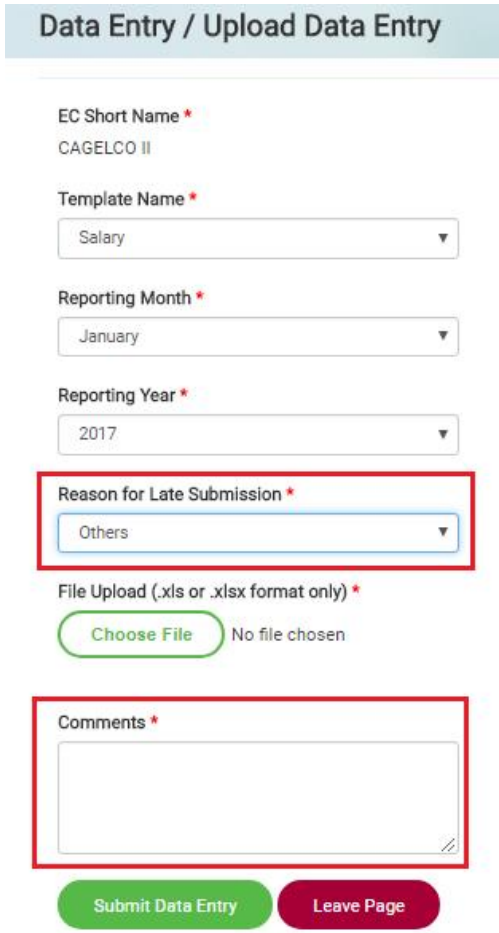
- Comments **textbox** will be required if Reason is "Others". Enter comments for late submission.



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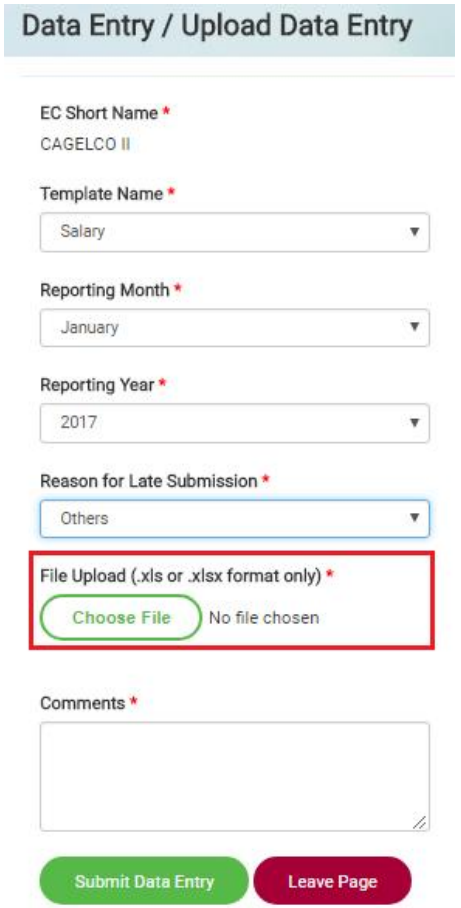
3. Once all required fields are filled out, click **Choose File** button and select the accomplished DET file from the local computer's storage.



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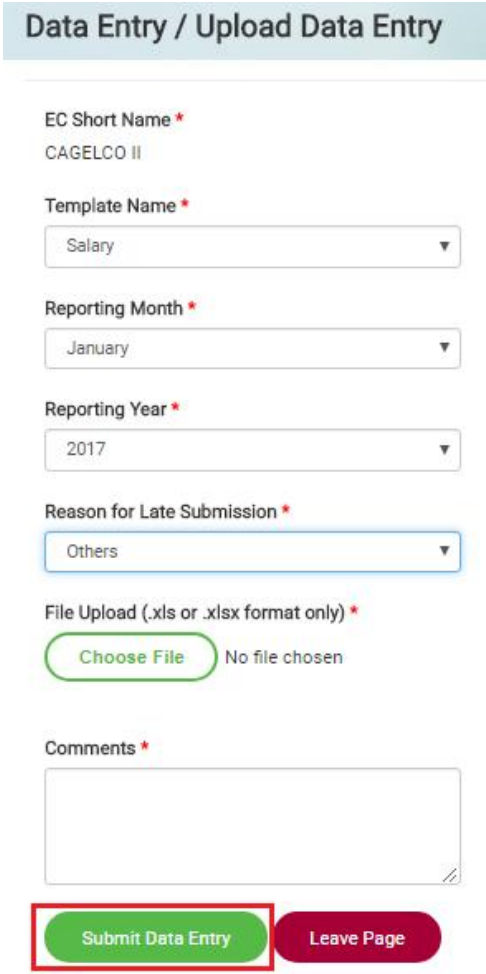
4. Click **Submit Data Entry** button.

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



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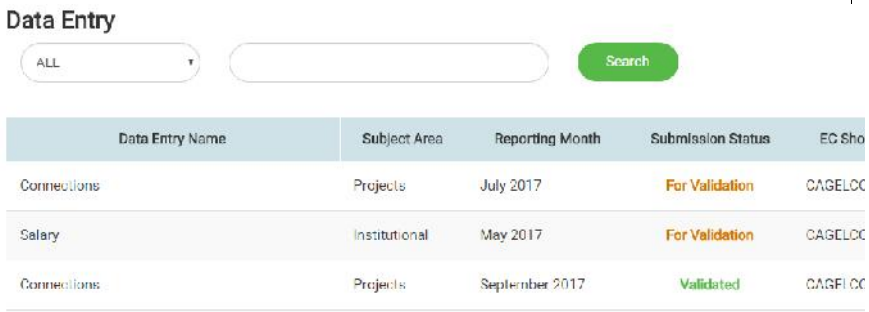
FOR SUBMISSION WITH NO DATA ERROR • System will display a *prompt* for successful submission. • Click **OK** button on the prompt.	
• System will revert back to the *Data Entry list* screen. • DET status for successful submission is "**Submitted**".	

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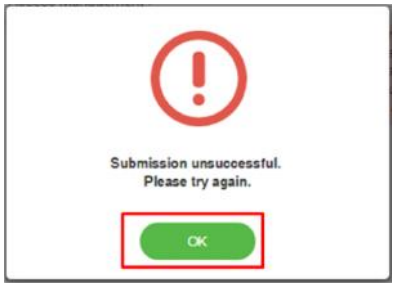
FOR SUBMISSION WITH DATA ERROR

- System will display a *prompt* for unsuccessful submission.
- Click **OK** button on the prompt.

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



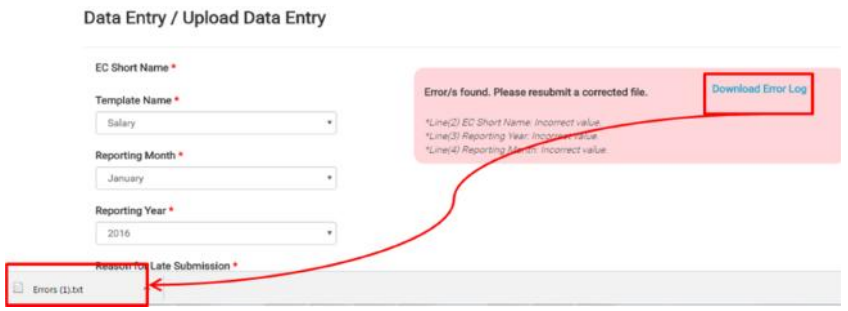
- System will display *errors* on the screen.
- User may opt to download the error log by clicking **Download Error Log** link.
- Click the *error log* to open the file.

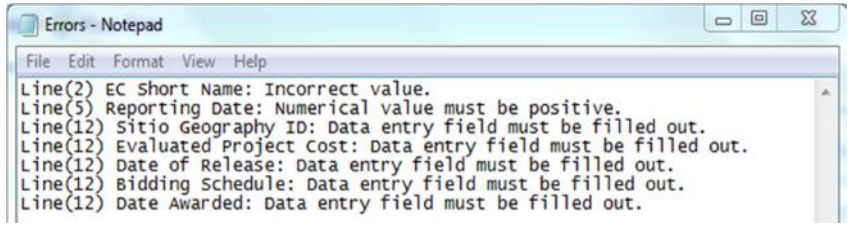
Possible Data Errors:

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





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FOR RESUBMISSION WITH NO DATA ERROR

- System will display a confirmation *prompt* for resubmission.
- Click **Yes** button on the prompt.

- System will revert back to the *Data Entry list* screen.
- DET status for successful resubmission is "**Submitted**".

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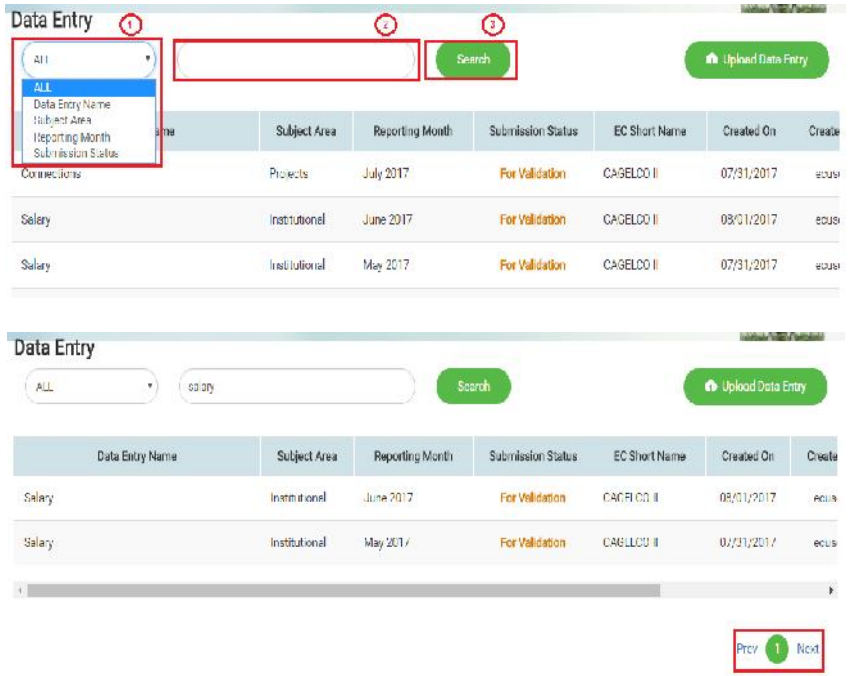
7.2.2 Search a Data Entry

System Details	System Screen/ Button
1. From the *Data Entry list*, select Filter. • ALL • Data Entry Name • Subject Area • Reporting Month • Submission Status • EC Short Name 2. Enter *keyword*. 3. Click **Search** button. Click **Previous** or **Next** button to view search results in other pages.	

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7.2.3 Sort Search Result

System Details	System Screen/ Button
1. From the *Data Entry list*, click *Column Header* of the column to be sorted. • Data Entry Name • Subject Area • Reporting Month • Submission Status • EC Short Name • Created On • Created By • 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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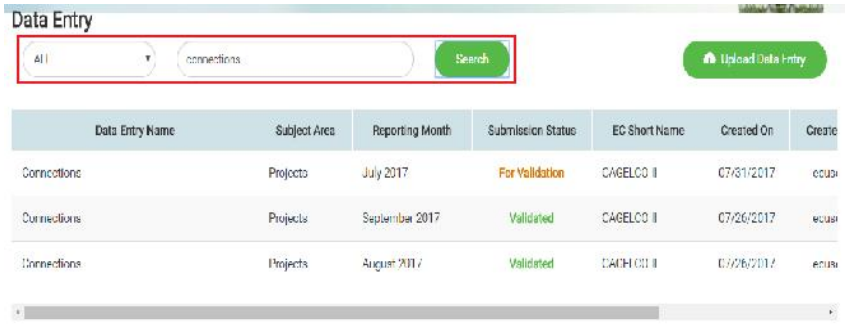
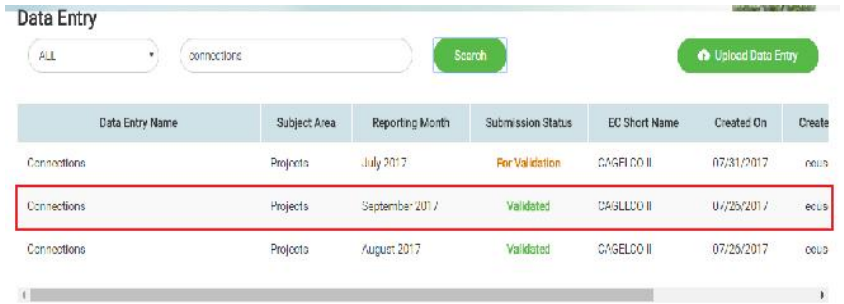
7.2.4 View Data Entry Details

System Details	System Screen/ Button
1. From the Data Entry list, search the DET. Submission Status: • **Submitted**[3] – a successfully submitted DET to be reviewed by NEA • **For Revision** – DET rejected by NEA to be revised by EC • **Acknowledge Receipt**[4]– DET that passed the review of NEA	
2. Click desired **DET** from the Data Entry list.	

[3] There is recognition of the possibility of change in the status from "For Validation" to "Submitted".
[4] There is recognition of the possibility of change in the status from "Validated" to "Acknowledge Receipt".

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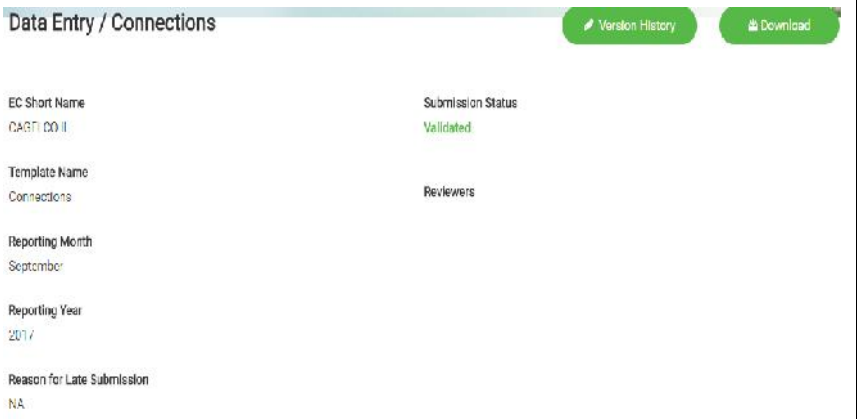
3. System will display the *Data Entry details* page.	

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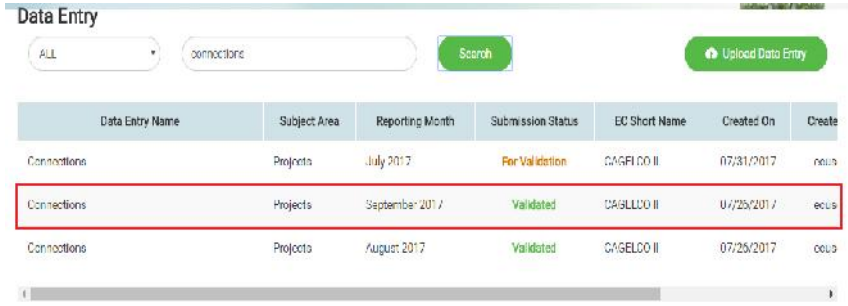
7.2.5 View Data Entry Version History

System Details	System Screen/ Button
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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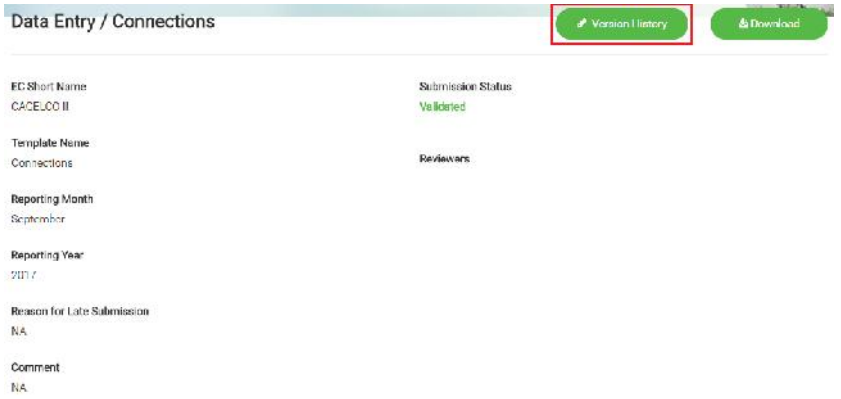
3. System will display the *Data Entry details* page. 4. From the *Data Entry details* page, click **Version History** button.	
5. System will display the *history of submissions* for the DET. 6. System assigns an incremented version for every submission.	

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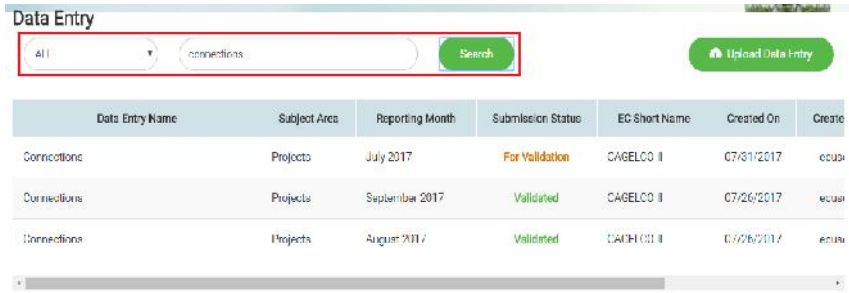
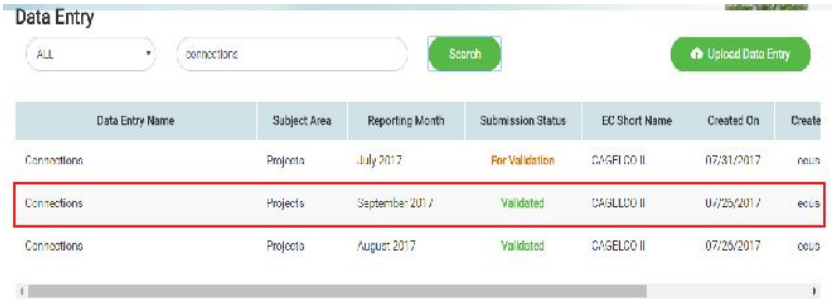
7.2.6 Download Data Entry

System Details	System Screen/ Button
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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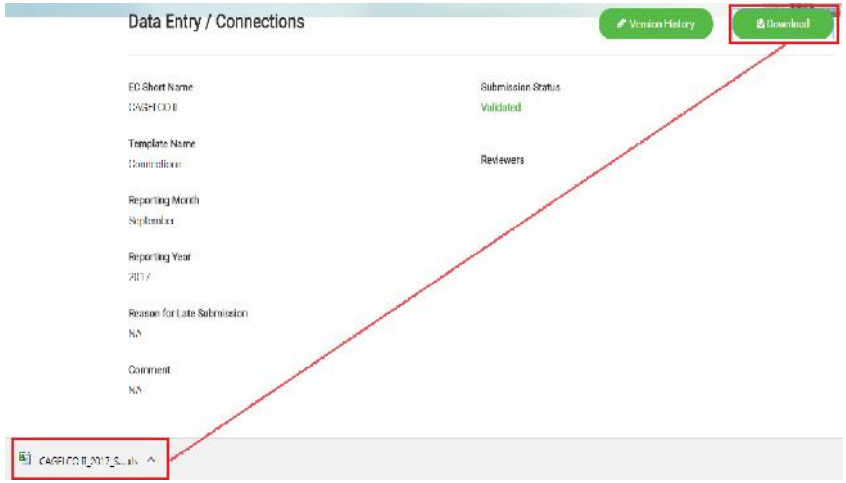
3. System will display the *Data Entry details* page.

4. From the *Data Entry details* page, click **Download** button to download the DET.
   - DET file is in excel format.
   - File will be automatically saved to your local folder when using Chrome browser. Other browsers may require you to specify the folder destination.

5. Click the **DET** file to open it.



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7.3 Downloads Menu Tab

System Details	System Screen/ Button
1. Select **Download** from the Menu tab. 2. *Reports and Geography List* tabs will be displayed.	

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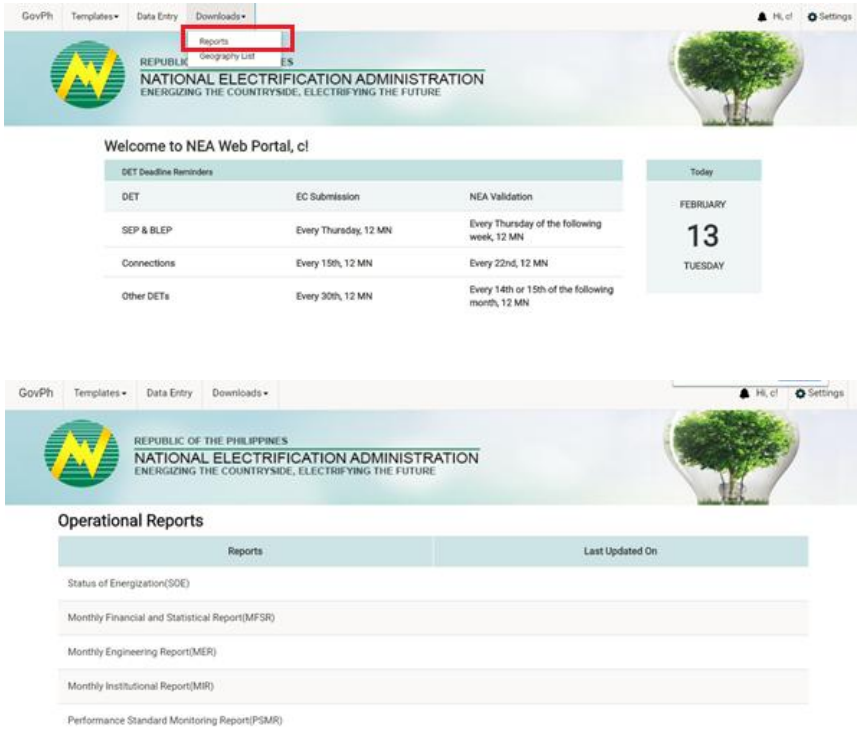
7.3.1 Operational Reports Viewing

System Details	System Screen/ Button
1. Select **Download > Reports** from the Menu tab. 2. *Reports list* will be displayed.	

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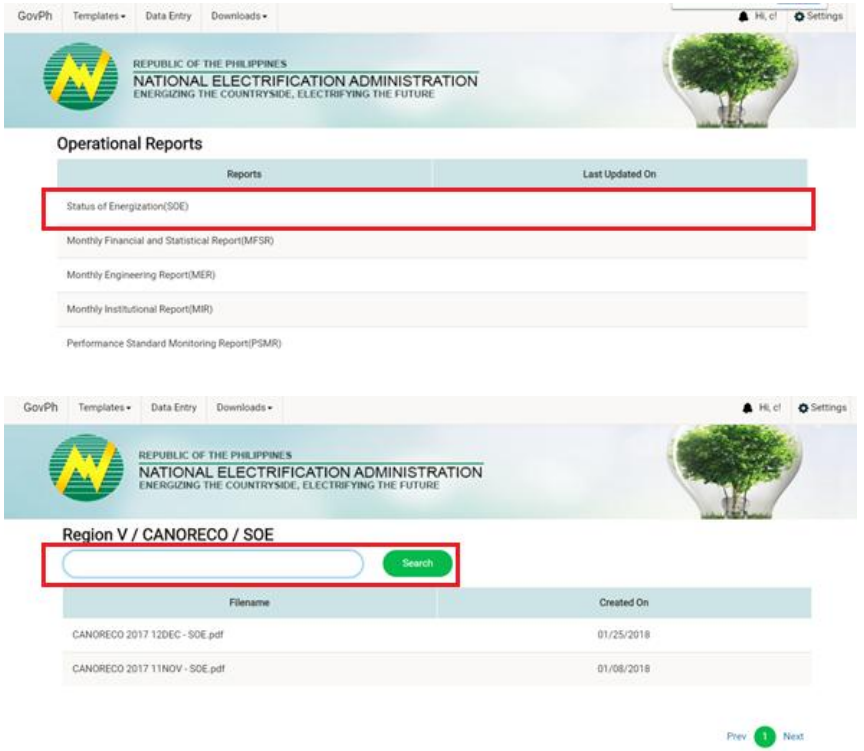
7.3.2 Search an Operational Report

System Details	System Screen/ Button
1. From the *Reports list*, select a **Report**. 2. Enter *keyword*. 3. Click **Search** button.	

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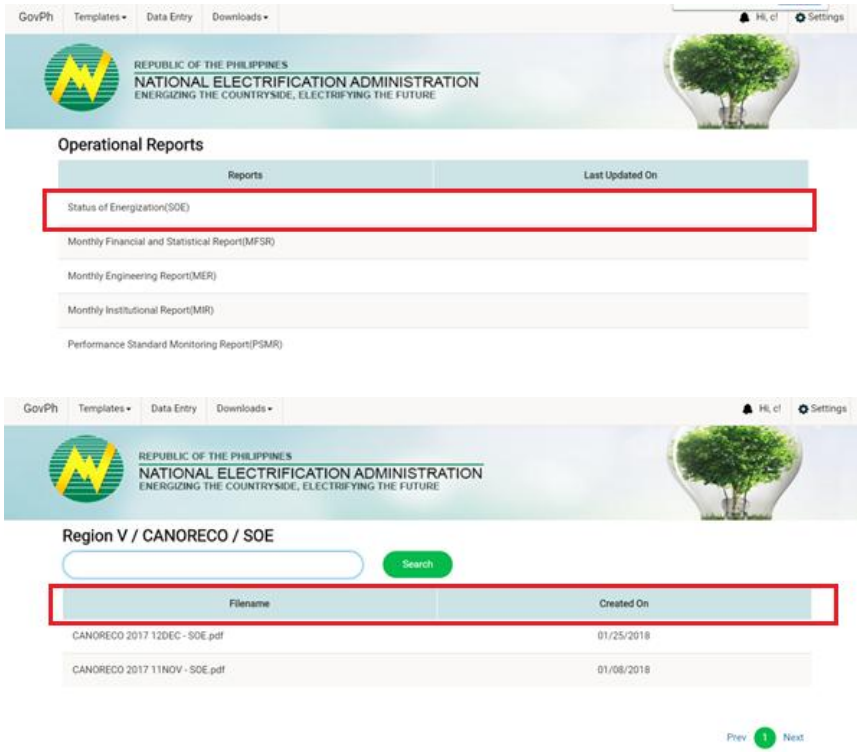
7.3.3 Sort Search Operational Report Results

System Details	System Screen/ Button
1. From the *Reports list* screen, select a **Report**. 2. Click a *column. header* to sort list. • File Name • Created On Sorting rearranges the entries alphabetically A-Z or Z-A. Click to sort again in the reverse order.	

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7.3.4 Download Operational Report

System Details	System Screen/ Button
1. From the *Reports list*, select a **Report**.	

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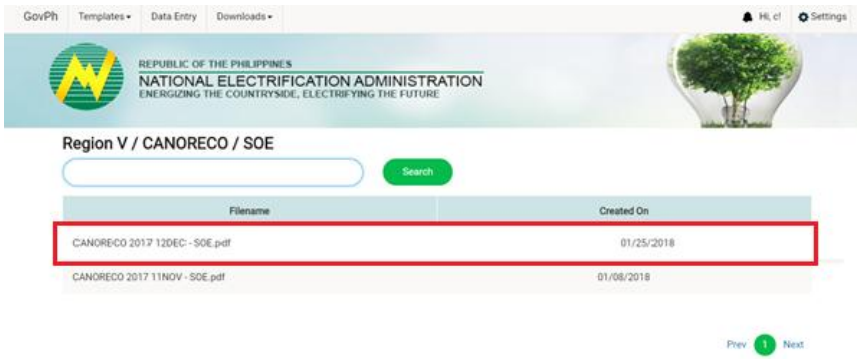
2. Select the desired **Operational Report**.

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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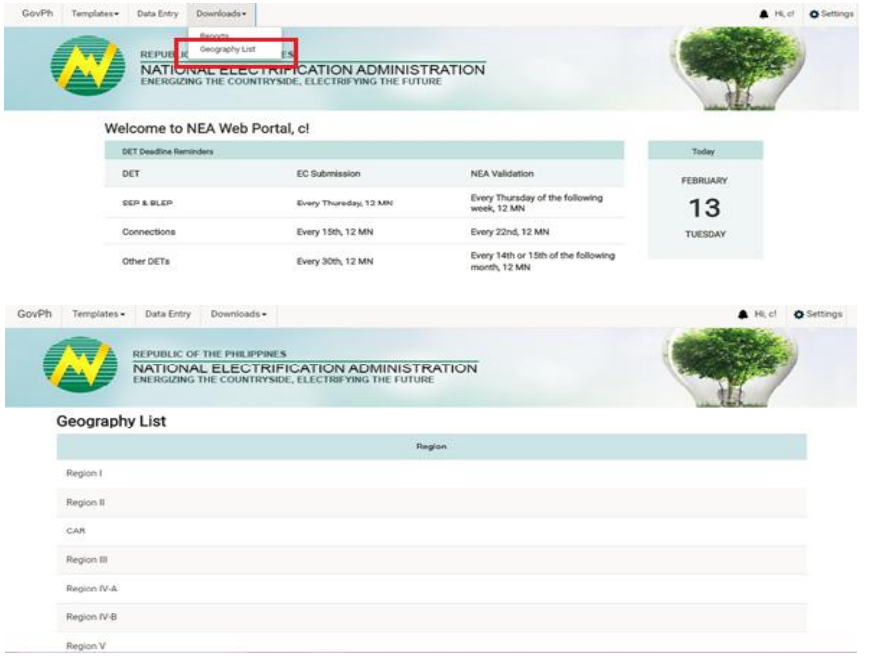
8.0 NEA Web Portal Geography List Download Navigation

This section provides a guide for viewing and downloading Geography List based on Master Data (MD) Geography.

8.1 Geography List Viewing

System Details	System Screen/ Button
1. Select **Download > Geography List** from the Menu tab. 2. *Geography List* will be displayed.	

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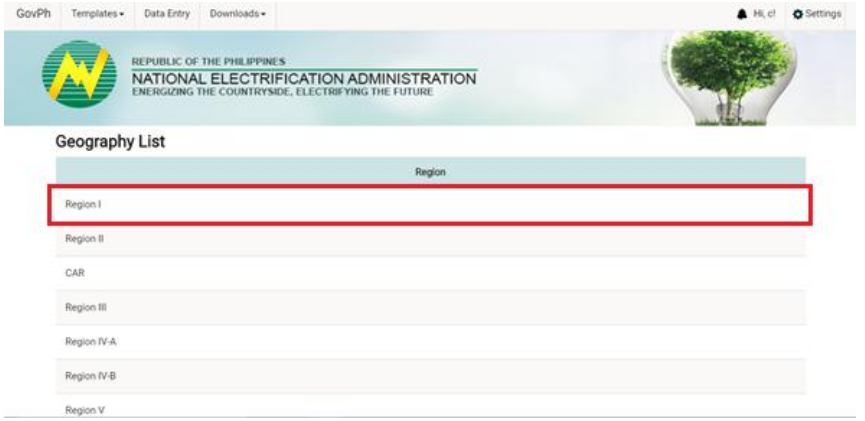
8.1.1 Download Geography List

System Details	System Screen/ Button
1. From the *Geography List*, select the desired **Region**. 2. Click the **filename** to download the report. Report will be in PDF format. 3. Click the **PDF file** to open it.	

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