

HARDCAT SYSCON USER GUIDE



KZN PROVINCIAL TREASURY

Hardcat Syscon User Guide

Introduction

To improve system integrity and improve system security, it is imperative that a System controller (Syscon) be appointed to manage and control access to the system.

The Chief Financial Officer (CFO) or a delegated official have a responsibility as per PFMA to ensure that there are transparent systems of risk and financial management within the department; it is therefore the duty of the CFO to appoint the System controller.

It is strongly recommended and advised for each department (irrespective of its size) to have a dedicated Syscon as well as an acting Syscon in the event of the Syscon being unavailable. Training is essential before a Syscon can be able to perform Syscon duties.

Purpose

The purpose of this document is to outline the duties of a Syscon and provide a detailed procedure guide on how to create and edit users, perform system configurations, and create workflow groups on Hardcat.

Duties of a Syscon

- Ensuring that security requirements and all Hardcat Notices are adhered to when managing user accounts.
- Creation and maintenance of user profiles-Creation of new users, granting of functions and resetting of passwords.
- Creation of workflow groups.
- Attend and participate in the Provincial Change Control Forum and communicate all the changes with all affected users within the department.
- Provide management with relevant reports.
- Provide users with Hardcat forms.
- Facilitate the coordination of training.
- Facilitate departmental change requests.
- Facilitate the upgrade release activities in the department.

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It is not within the responsibility of the Syscon to

- Install Hardcat.
- Conduct any financial transactions.
- Create and maintain the Product Catalogue on the system.
- Creation and maintenance of the People structure on the system.
- Creation and maintenance of the Budget Items and ensuring that there are in line with BAS items.
- Render hands-on guidance and training when the need arises.
- Assist users with the creation and maintenance of the Asset Register.
- Provide reports for monthly expenditure reconciliation.

Basically the Syscon duties are three fold:

- Configuration of the system
- Creating workflow groups
- Creating and maintaining Hardcat Users

Configurations on Global Functions as per User Account Management Procedure
Setting up system configurations on global functions must be done as per User Account Management Procedure as follows:



- Click File-Administration-Options

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Hardcat Global Options

Automatic Code Generation
Category: Assets
 Generate Numbers Automatically
Mask to Use For Codes: AA#####
Use ? for letters or # for Numbers. All other characters are inserted literally.
Next Available Number: AA007272

Area: Assets
Prompt for User Key 1: Payment Voucher
Prompt for User Key 2:
Prompt for Currency User Key 1:
Prompt for Currency User Key 2:
Prompt for Date User Key 1: Payment Date
Prompt for Date User Key 2:

Use Multiple Currencies
Currency...
Symbol for "Other Currency":

Observe Asset End Of Life Settings
 Allow Blank Passwords for Logins
 Min Length of Password: 6
 Passwords Expiry Days: 30
Number of Stored Passwords: 6
 Login Timeout (mins): 60
 Allow Purchase Order Number edit
 Common Budgets across modules
 Allow Asset Description edit
 Create File with Rejected Import Records
 Enable Asset User Currency Fields
 Enable Asset User Date Fields
 Use Dynamic Cursors Only
 Use CatScan Login Details in Audit trail
 Create Unit History Only When Changed
 Permissions disabled for new Logins
 Allow MAPI email

Floating Point Precision: 3
Currency Precision: 2

Default Priority: Priority 3
Configure Priorities...
Configure Additional Cost Types...
Configure Asset Status Fields...
Configure Disposal Status Fields...
Configure Asset Finance Status Fields...
Configure Units Types...

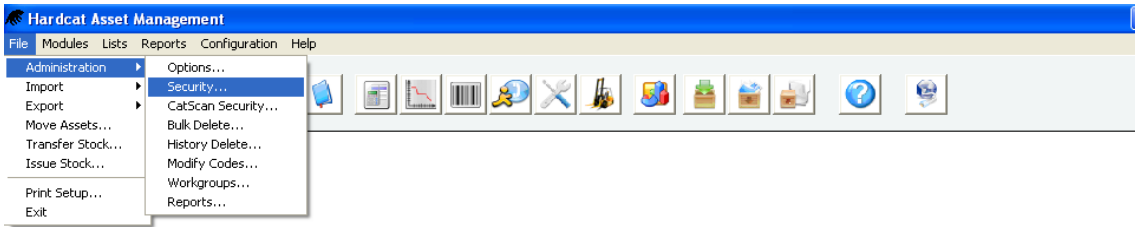
OK Cancel Help

- Hardcat global options lay ground rules on the configuring of Hardcat as per Hardcat notice no 1 of 2007 and Security Standards. It is thus imperative that the syscon have knowledge of the global options.

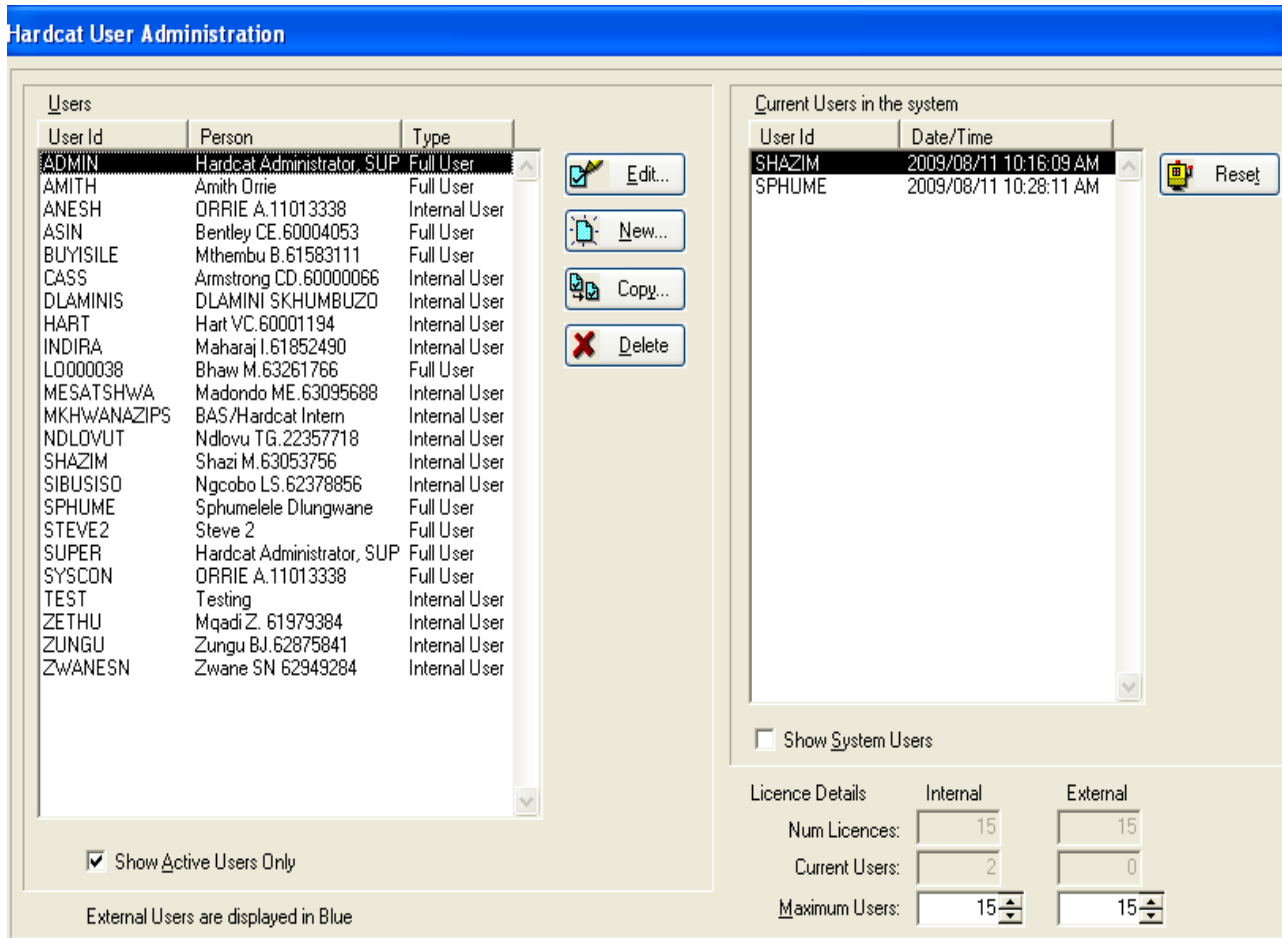
Creating a new users

- A Hardcat user application form needs to be completed before a user can have access onto Hardcat. The form is completed by the user and signatures verifying authorisation is obtained from a senior manager and the syscon.
- Upon completion of the form the syscon can then create the user onto Hardcat. Click File-administration-Security
- User are created as per User Account Management Procedure

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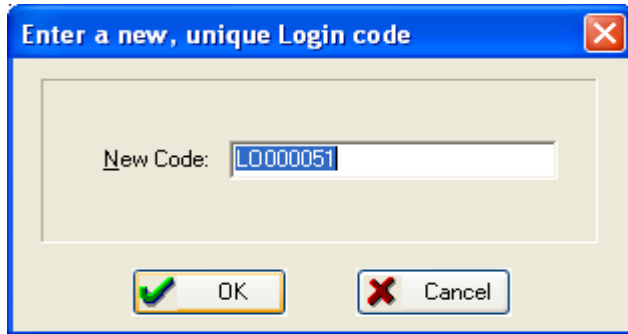


- The left box lists all users of Hardcat. The right box lists all users currently logged on to Hardcat, and the date and time of log in

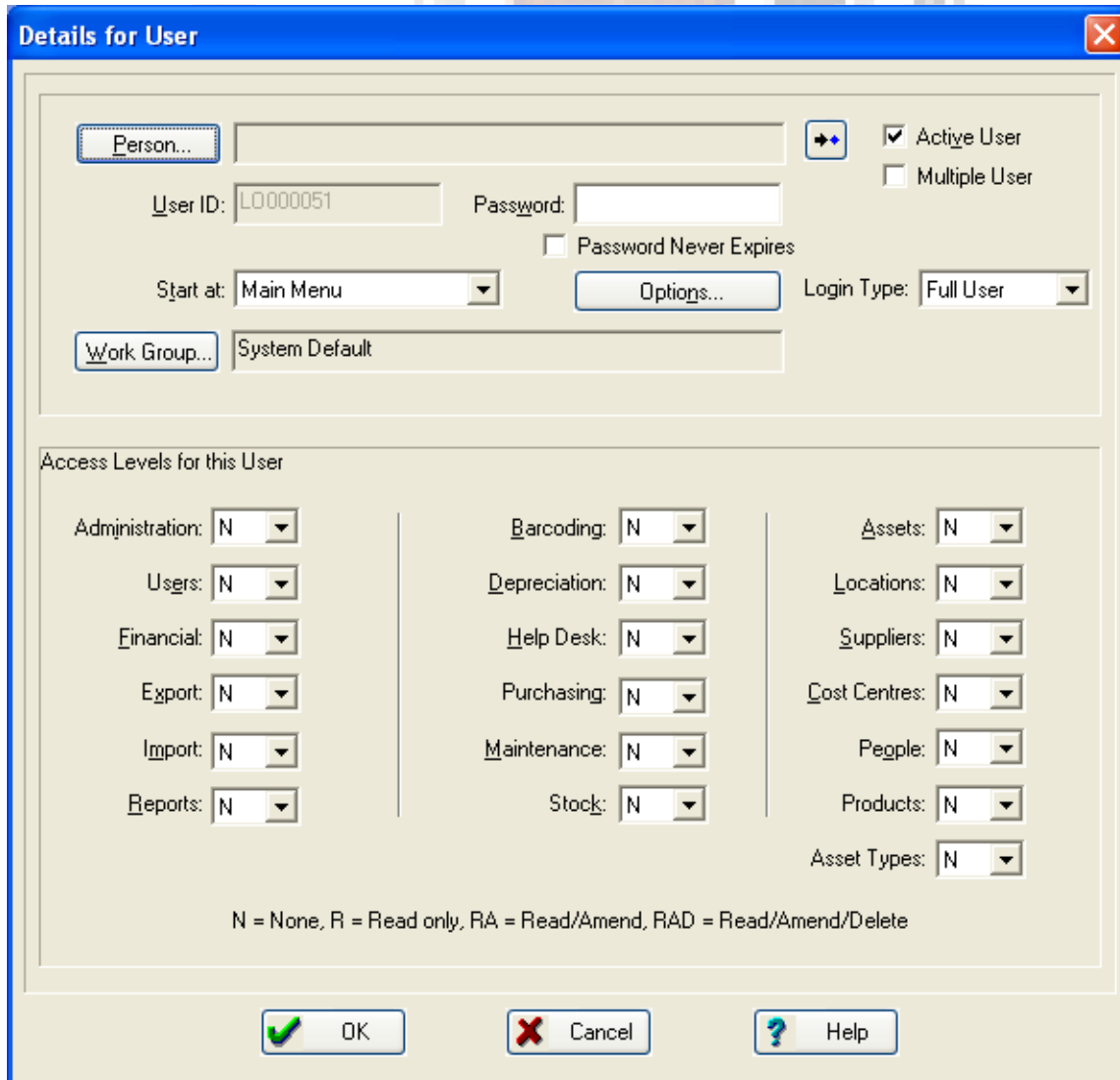


- Click on **New** on the Hardcat User Administration window

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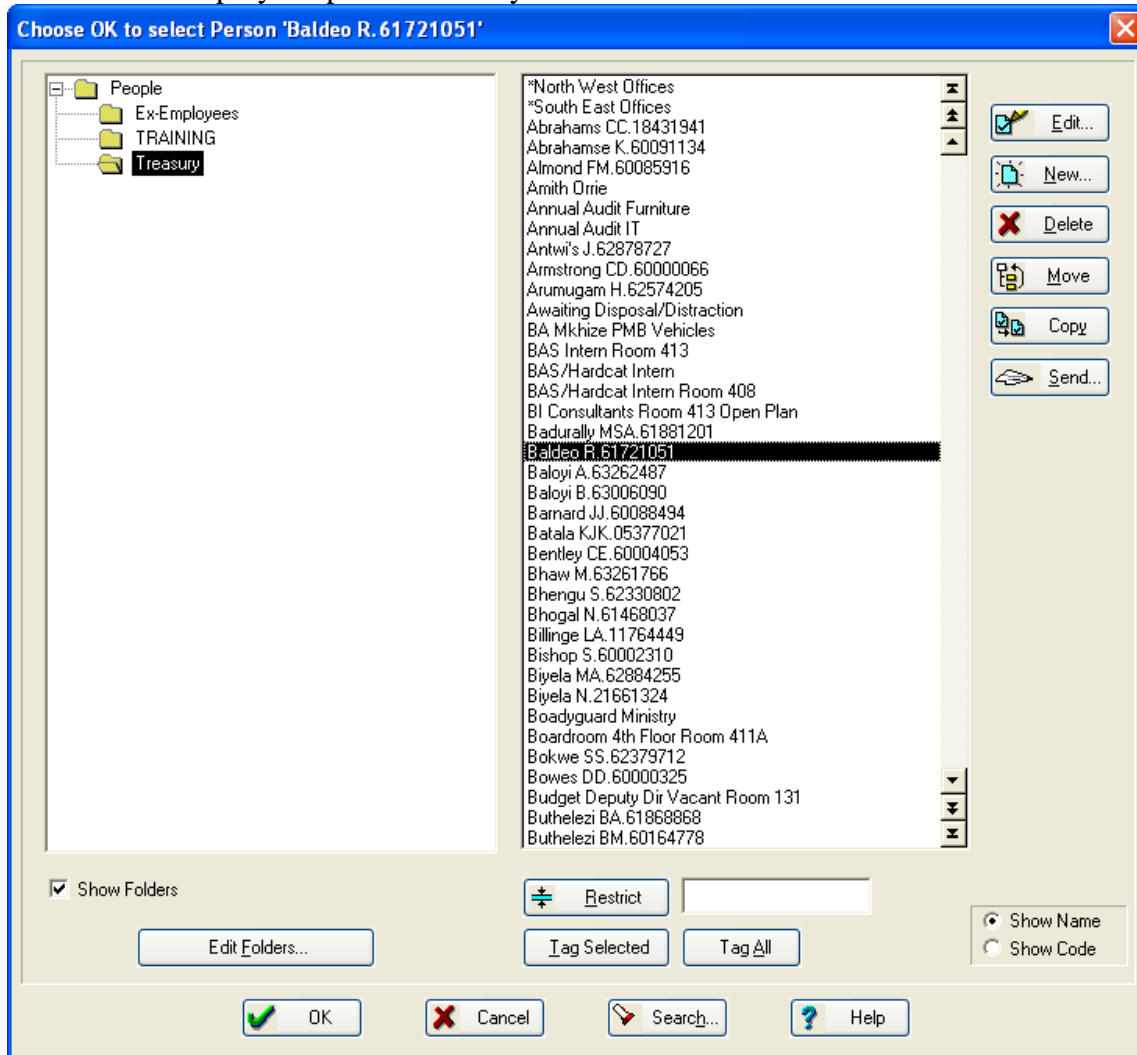


- Enter a unique code (User ID) on the New Code field. Employee Persal number or initial and surname can be used



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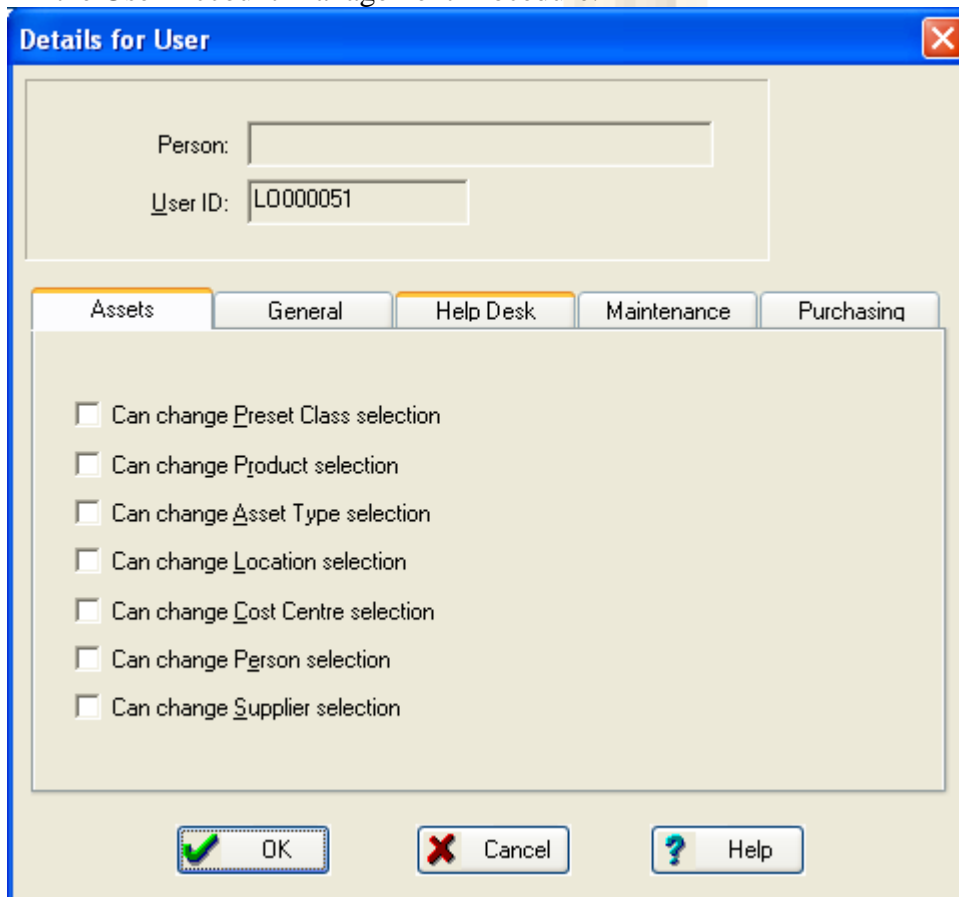
- On “Details for User” screen, click “person” to link the User id to a person. However, if this particular person does not exist, then you need to create a person as an employee .Thus on this screen, go to “new” and complete all necessary information. Therefore note : A person must exist as an employee of the Department before the person can be created as a user. Thus create an employee / person before you create a user.



- Select the Person from the people list.
- Click **OK**
- The password is initially set by the Syscon. Once the user has been created and when the password has expired the user can change it by using the new password field on the log on screen
- The Active User checkbox allows the syscon to activate a User.

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- The Multiple User checkbox allows the User to log on to the system simultaneously without overriding the User
- Work group links the user to a correct work group
- Access Levels for this User allows administrator to restrict access to certain areas within Hardcat. Access levels are allocated as per Hardcat application form, however the User Account Management Procedure prescribe the access levels for various functions.
- Click on Options button to set additional user security access levels. The access levels are allocated as per Hardcat user application form according to the prescribed access levels on the User Account Management Procedure.

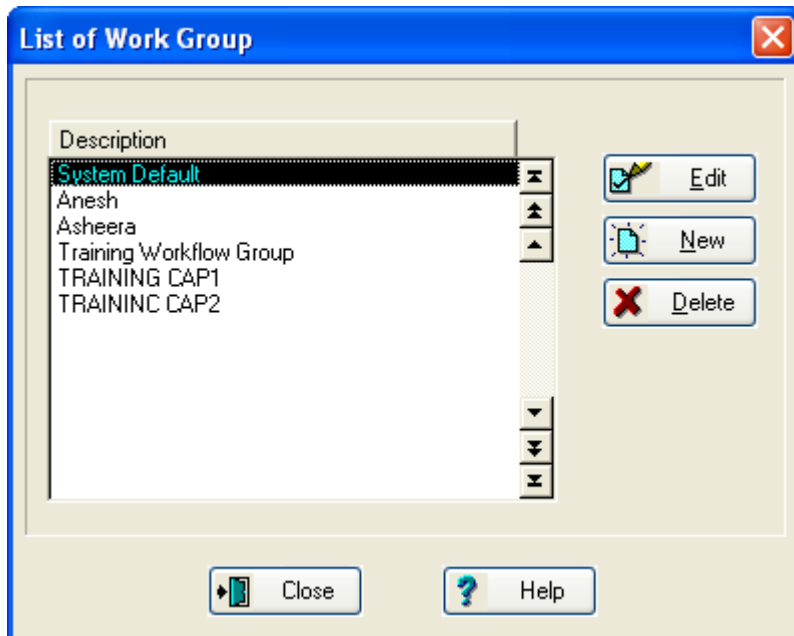


- Click “**OK**”. The new user will now appear on the list of users.
- Only the Syscon can EDIT the details of a user by selecting EDIT.

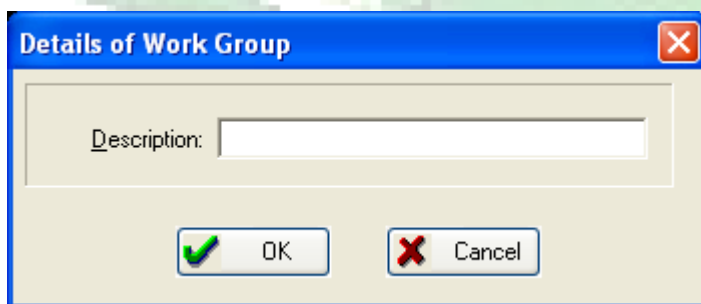
Creating Workflow groups

- Click on File-Administration-Workgroups

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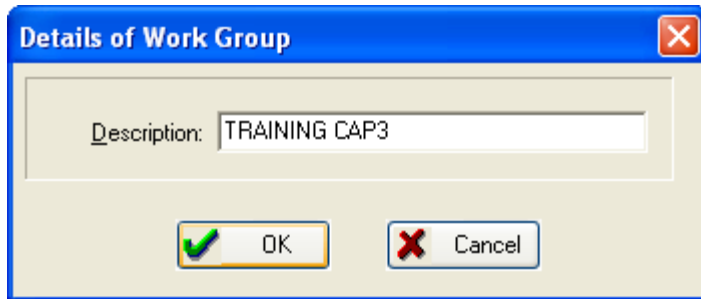


- A list of workgroups is shown on the screen above. To create a new one click on New

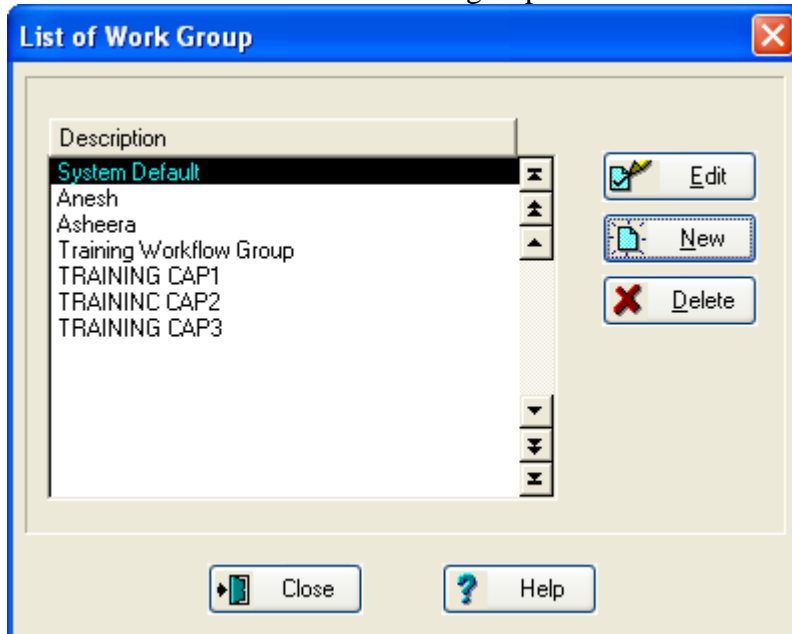


- Under description write the workgroup being created

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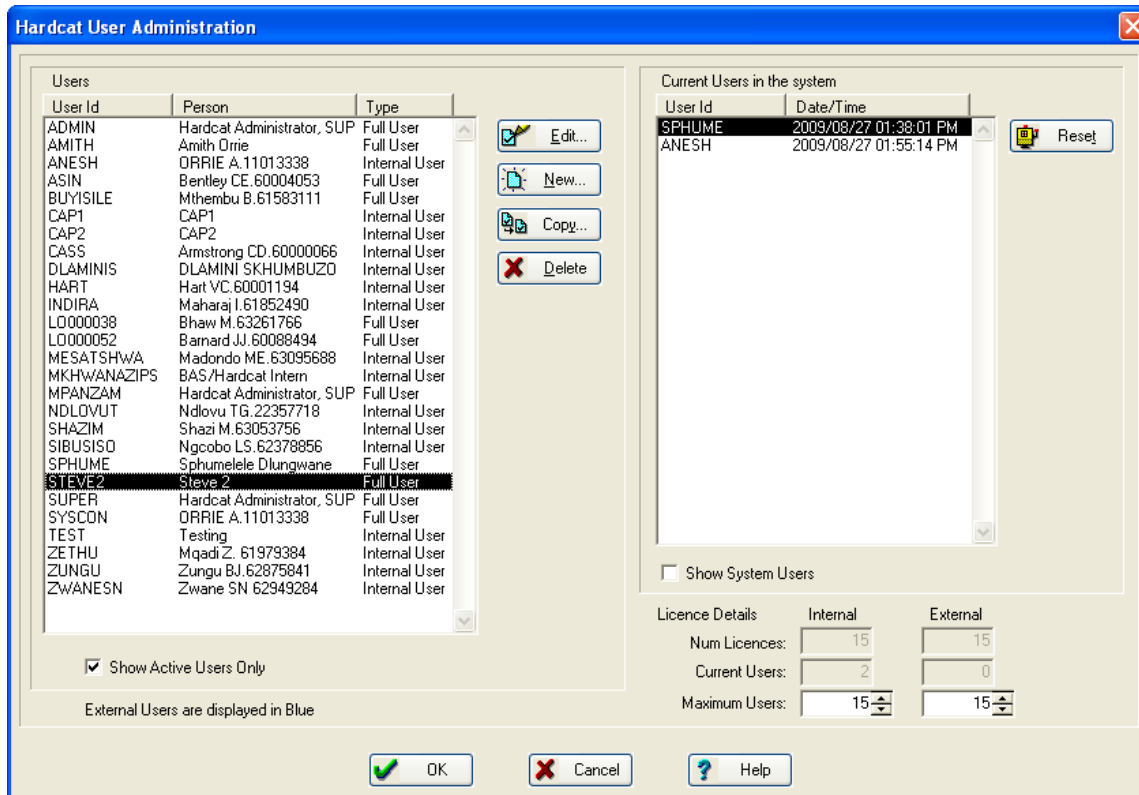
- Click **OK** and the new workgroup created is than shown under Description.



Editing current users

- Generate the Hardcat user administration window

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- Click on the userid you want to edit
- Click edit

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The screenshot shows the 'Details for User' window. At the top, there is a 'Person...' button and a text field. Below this, the 'User ID' is 'L0000051' and the 'Password' field is empty. There are checkboxes for 'Active User' (checked) and 'Multiple User' (unchecked), and a 'Password Never Expires' checkbox (unchecked). The 'Start at' dropdown is set to 'Main Menu', and the 'Login Type' dropdown is set to 'Full User'. There is an 'Options...' button. The 'Work Group...' field is set to 'System Default'. Below this is a section titled 'Access Levels for this User' with a grid of dropdown menus for various categories: Administration, Users, Financial, Export, Import, Reports, Barcoding, Depreciation, Help Desk, Purchasing, Maintenance, Stock, Assets, Locations, Suppliers, Cost Centres, People, Products, and Asset Types. All dropdowns are currently set to 'N'. A legend at the bottom of the grid explains the codes: N = None, R = Read only, RA = Read/Amend, RAD = Read/Amend/Delete. At the bottom of the window are 'OK', 'Cancel', and 'Help' buttons.

- On the details for user window, changes such as access levels, passwords etc can be made.

End