<u>OPTCL - SAMAST APPLICATION User Manual (Admin & Non-Admin Users)</u>

🗒️ **OPTCL – SAMAST Application** *(Odisha Power Transmission Corporation Limited)*

🔷 1. Application Overview

The **OPTCL – SAMAST** application (Scheduling, Accounting, Metering and Settlement of Transactions) is a web-based platform developed by OPTCL to ensure **transparency**, **accuracy**, and **efficiency** in the management of energy transactions across Odisha.

The platform is designed for both **Admin** and **Non-Admin users** with access restricted based on roles and permissions.

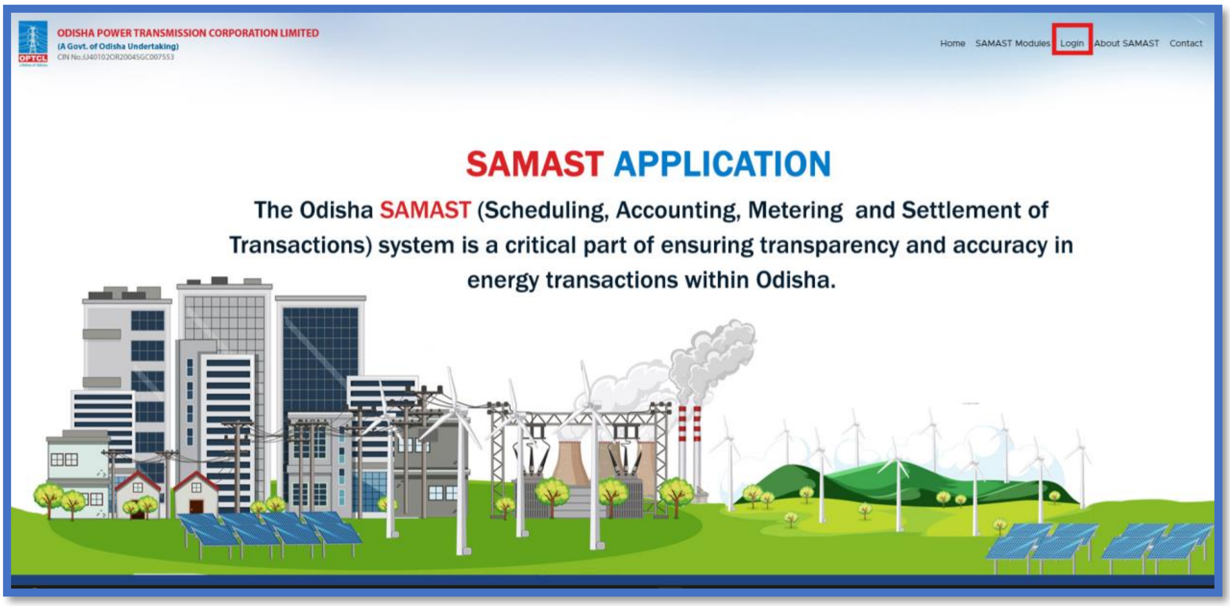
🔷 2. Accessing the Application

✅ URL

All authorized users (Admin and Non-Admin) can access the application via the official URL:
👉 http://103.70.61.27/samast/ ****(link can be Changed)

🖼️ ***Landing Page:***

📌

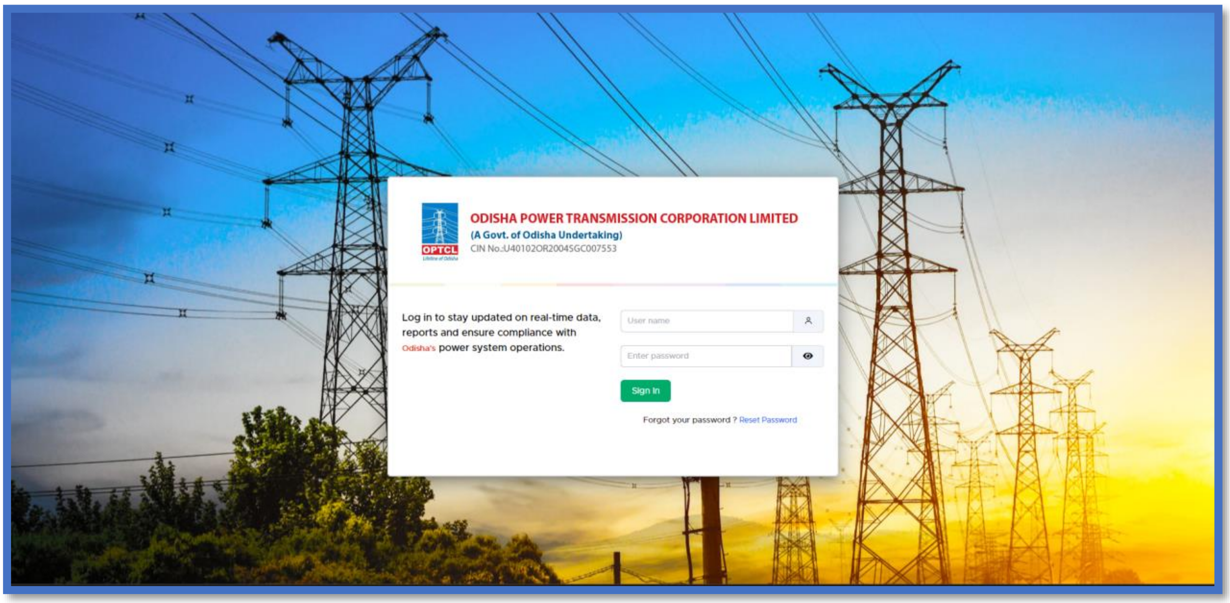


On this page, users must click the **“Login”** option from the top-right menu to proceed.

🔷 3. Login Procedure

🖼️ ***Login Page:***

📌



Steps to log in:

1. Enter your **Username**
2. Enter your **Password**
3. Click on **Sign In**
4. If you forget your password, click **Reset Password**

✔️ Only valid credentials provided by the admin will grant access.

🔷 4. Homepage After Login

After successful login, users will land on the **Home Page** of the OPTCL – SAMAST application.

- The **modules displayed** on the home page depend on the **role and rights assigned** by the Admin.
- Both **Admin** and **Non-Admin users** will see their **username** displayed at the top-right corner of the screen.

✅ Modules Visible to Admin Users:

Admin users have access to the **entire application** and can view all the following modules:

🔢 Module Name

1 Admin Management

2 Outage

3 Open Access

4 MIS Dashboard

5 MDM, Energy Accounting & DSM

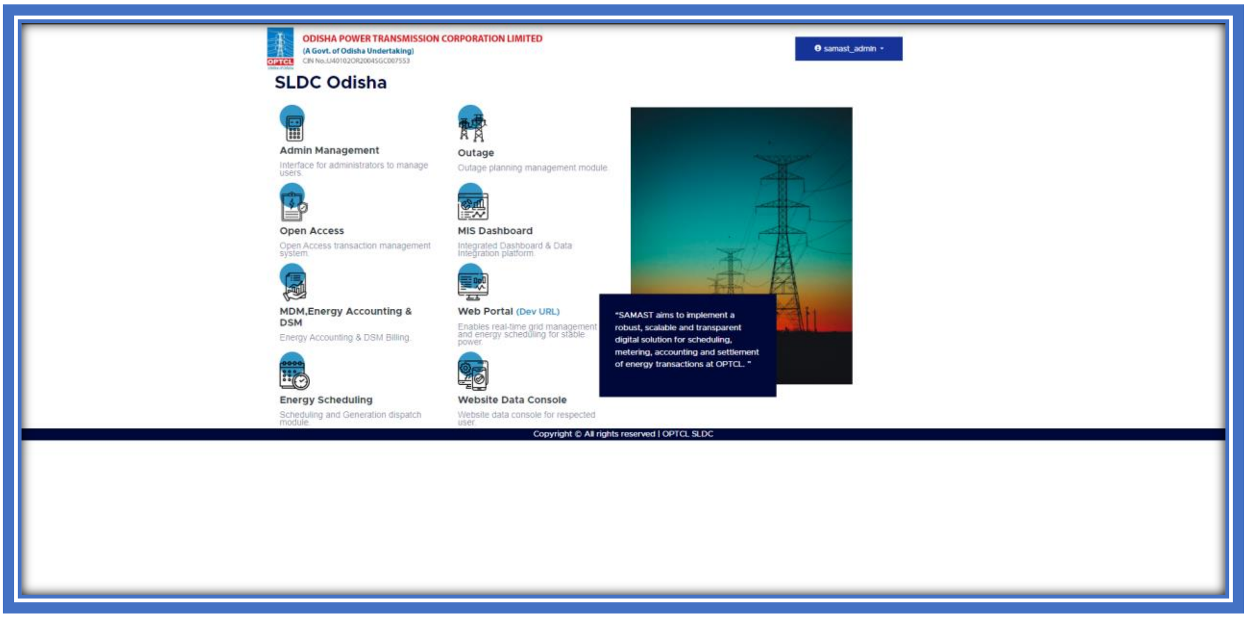
6 Web Portal (Dev URL)

7 Energy Scheduling

8 Website Data Console

🖼️ ***Homepage Page*** *after Login (Admin View)*

📌



✅ Modules Visible to Non-Admin Users:

Non-admin users will only see the modules that the **admin assigns** to them during user setup.

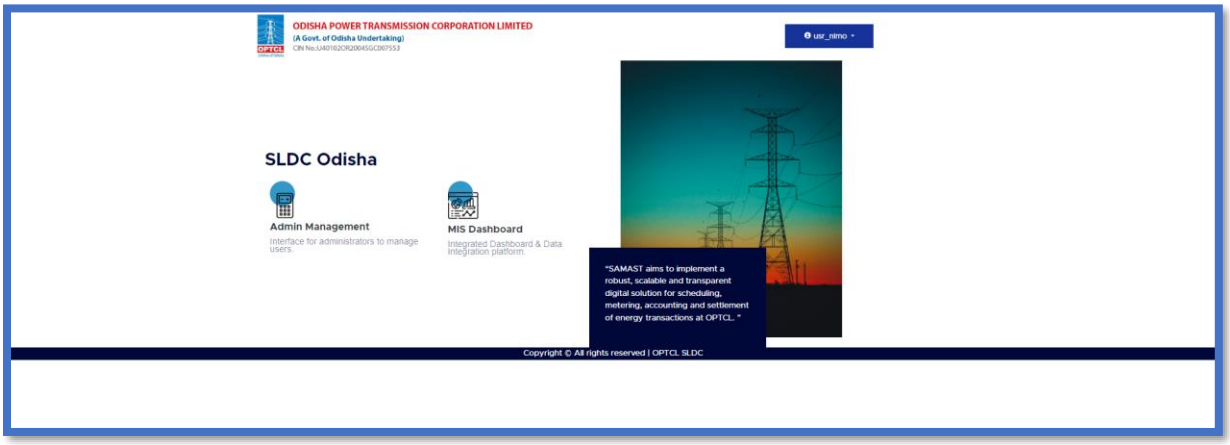
For example:

- A non-admin user with rights only to the "MIS Dashboard" and "Admin Management" will see only those two modules on the homepage.

🛡️ This ensures secure and role-based access to critical energy data and operations.

🖼️ ***Homepage Page** after Login (Non - Admin View)*

📌



🔷 5. Role-Based Access Summary

User Type	**Access Rights**
Admin	Full access to all modules; can manage users and permissions
Non-Admin	Restricted access; modules assigned by Admin only

🔷 6. Admin Management Module

🧩 Purpose of the Module

The **Admin Management** module is one of the core modules in the OPTCL – SAMAST application. It provides role-based access and functionality tailored for both **Admin** and **Non-Admin** users.

👥 User Access Overview

User Type	Admin Management Features
Admin User	Full access to manage users, utilities, and master data.
Non-Admin User	Limited access — mainly focused on utility registration and related actions.

🔽 Functional Access Breakdown

🔹 **Admin Users Can:**

1. **Create New Users**
2. **Assign Module Access Rights** to users
3. **Search, Edit, Delete, Lock/Unlock Users**
4. **Download User List**
5. **Manage Utility Entities**:
    - Create new utility
    - Edit utility details
    - Approve/Reject utilities
    - Disable utility
    - Search & Download utility
    - Download application fee paid receipt
6. **Create Charges** using **Master Data** setup

🔸 **Non-Admin Users Can:**

1. Create new utility
2. Edit utility details
3. Search & download utility information
4. Download application fee paid receipt

🧭 Admin Management Module Layout

After a user (Admin or Non-Admin) clicks on the **Admin Management** module on the homepage, the system redirects them to the Admin Management dashboard with a menu bar.

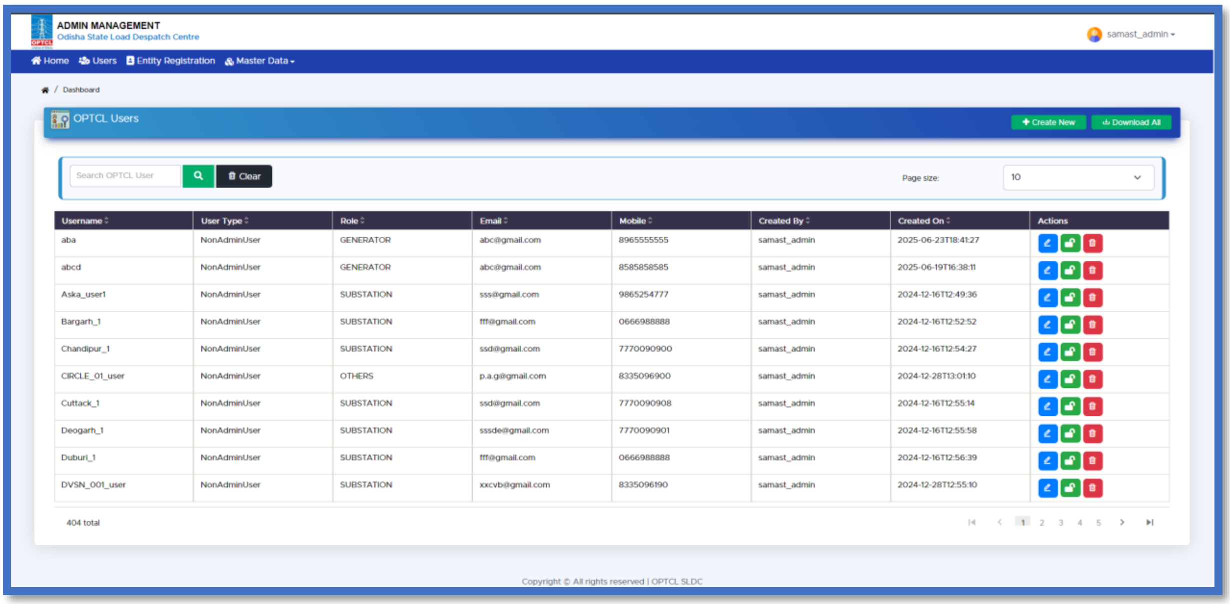
👤 For Admin Users, the top menu bar includes:

Menu Option	**Purpose**
Home	Landing/dashboard view
Users	Create, edit, manage user profiles and roles
Entity Registration	Register and manage Utility entities
Master Data	Configure charges and static reference data

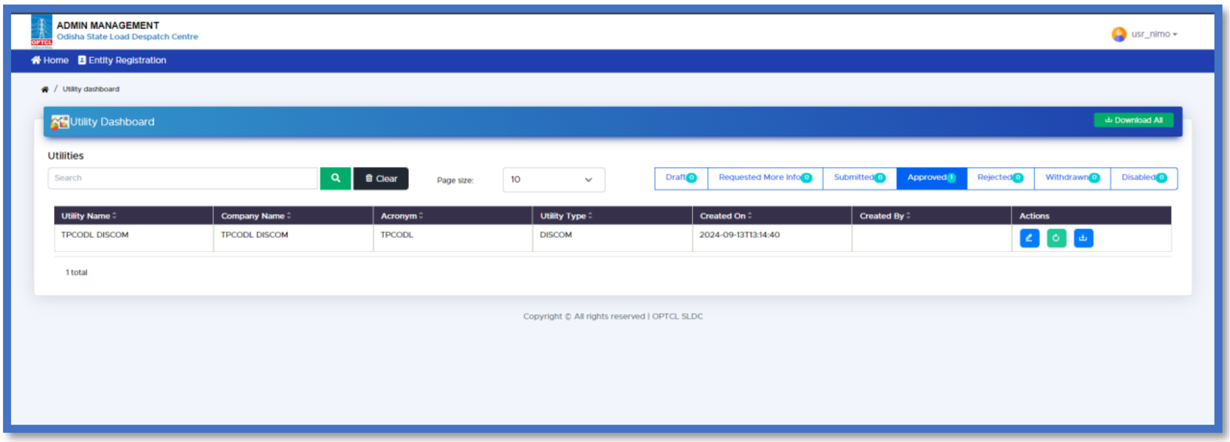
🧑‍🦰 For Non-Admin Users, the top menu bar includes:

Menu Option	**Purpose**
Home	Landing/dashboard view
Entity Registration	Register and manage their own Utility entities

🖼️ *Admin Management Landing Page — for Admin user*



🖼️ *Admin Management Landing Page — for Non-admin user*



✅ Benefits of Admin Management Module

- Ensures **centralized control** by Admin over user roles and modules.
- Allows **granular access control** based on responsibilities.
- Enables both Admin and Non-Admin users to **manage Utility Entities** efficiently.

📘 6.1 User Management – Admin View

🧩 6.1.1 New User Creation

When an **Admin user** enters the **Admin Management module**, they will land on the **User Dashboard**. This page is titled **"OPTCL Users"** and displays a list of all existing users created in the system.

🔹 Steps to Create a New User

1. From the **"OPTCL Users"** page, the admin should click on the **"Create New"** button located at the top-right corner of the page.
2. This action will open the **"Create/Update User"** page.

📝 Fields to Fill on the Create/Update User Page

Field Name	Description
User Name	Unique login name for the user
Email	Valid email ID of the user
Mobile	10-digit mobile number
First Name / Last Name	Full name of the user
Address	Residential or official address
User Type	Select from dropdown: NonAdminUser or SLDC Admin
User Role	Dynamic dropdown based on selected User Type (explained below)
Is Utility Registration Required?	Toggle switch that controls utility field behavior (explained below)

🧩 Dynamic Dropdown Logic for User Role

- If **User Type** is selected as **NonAdminUser**, the **User Role** dropdown will show:
  - Discom
  - Generator
  - EMBEDDED_IN_DISCOM
  - EMBEDDED_IN_STATE
  - etc.
- If **User Type** is selected as **SLDC Admin**, the **User Role** dropdown will show:
  - SLDCadmin
  - sldccontrolroom
  - sldcpostfacto

⚙️ Utility Registration Toggle Behaviour

- If **"Is Utility Registration Required?"** toggle is **enabled (ON)**:

- The **Utility dropdown** will become **disabled**

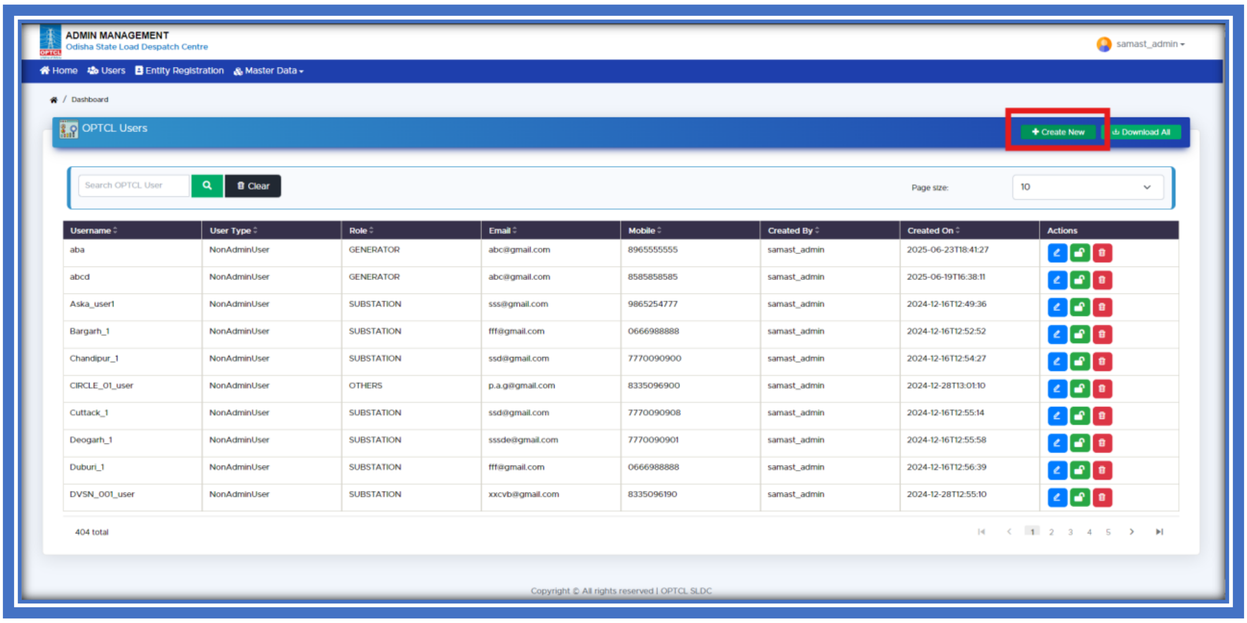
- If **the toggle is disabled (OFF)**:
  - The **Utility dropdown** becomes **enabled**, allowing the admin to select a utility

---

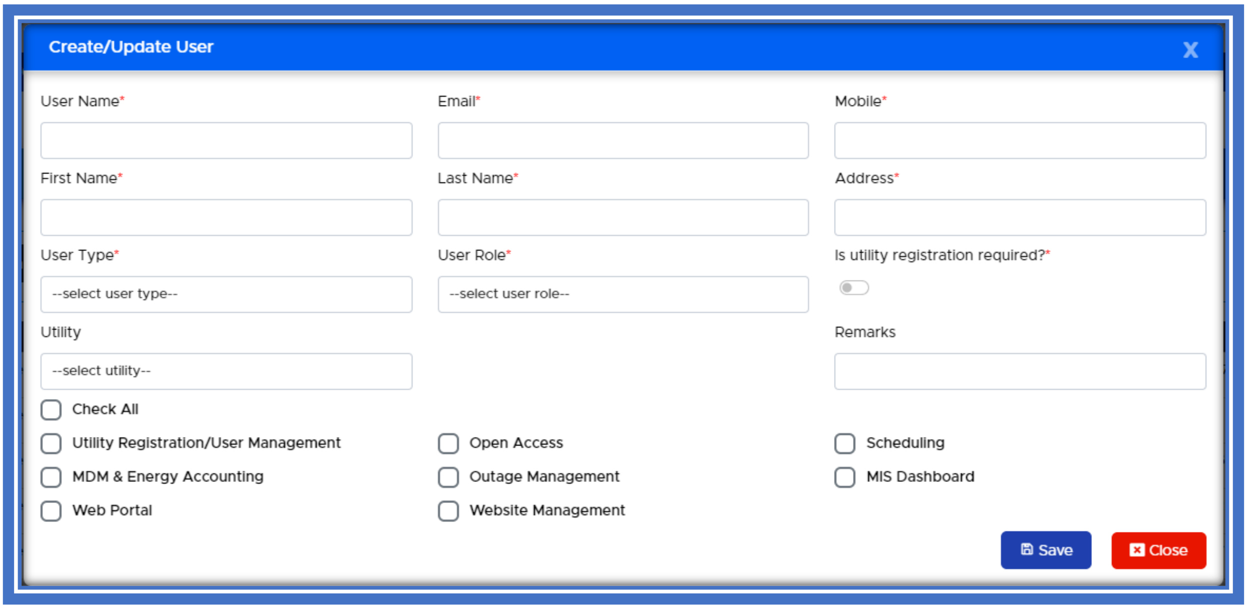
✅ Final Steps

- After entering all required fields and assigning the necessary **module access rights** to the user like Utility Registration/User Management, Open Access, Scheduling, MDM & Energy Accounting, Outage Management, MIS Dashboard, Web Portal, Website Management or Check All, and click **Save**.
- The new user will be successfully created and will appear in the **User Dashboard list**.

🖼️ *OPTCL Users page with "Create New" button*



🖼️ *Create/Update User form with filled example*



🔐 **Note for Admins:**

- Ensure no duplicate usernames are used
- All mandatory fields should be filled
- Always double-check the user role and access permissions before saving

---

🔹 6.1.2 Edit, Delete, Lock & Unlock Users

On the **User Dashboard** (titled *"OPTCL Users"*), Admin users can manage existing users through the **Action column**.

Each user row includes action icons:

Action	Icon Type	Function Description
Edit	✏️ Pen Icon	Allows Admin to update existing user details or module access
Delete	🗑️ Trash Icon	Deletes the user permanently from the system
Lock/Unlock	🔒 Lock Icon	Toggles user lock status. Useful for blocking/unblocking access as needed

🛑 **Note:** If a Non-Admin user attempts to log in with the **wrong password 3 consecutive times**, the account will be **automatically locked** by the system.

In such cases:

- The locked user must **request the admin** to unlock the account.
- Admin can then click the **lock icon** to toggle the user's access back to **unlocked** status.

🔹 6.1.3 Adjustable Page Size View

Admin users can **control how many user records are displayed** on the dashboard at once using the **Page Size dropdown**.

Available Page Sizes	Description
10 (Default)	Displays 10 users per page
50	Displays 50 users per page
100	Displays 100 users per page
All	Displays all users in one scroll

This is particularly helpful when managing a large user base.

🔹 6.1.4 Download All User Data

Admin users can download the **complete list of user records** in Excel format.

📍 To do this:

- Click on the **"Download All"** button located at the **top-right corner** of the User Dashboard page.
- An Excel file (.xlsx) will be automatically generated and downloaded.

This feature is useful for:

- Offline auditing
- Administrative reporting
- Backup purposes

🔹 6.1.5 User Search Function

The admin can **quickly locate a user** using the **Search field** located on the User Dashboard.

📍 How to use:

- Enter **part or full username**, Mobile or **email**
- The table will **auto-filter** and show matching results instantly

This is helpful for quick edits or access reviews without scrolling through multiple pages.

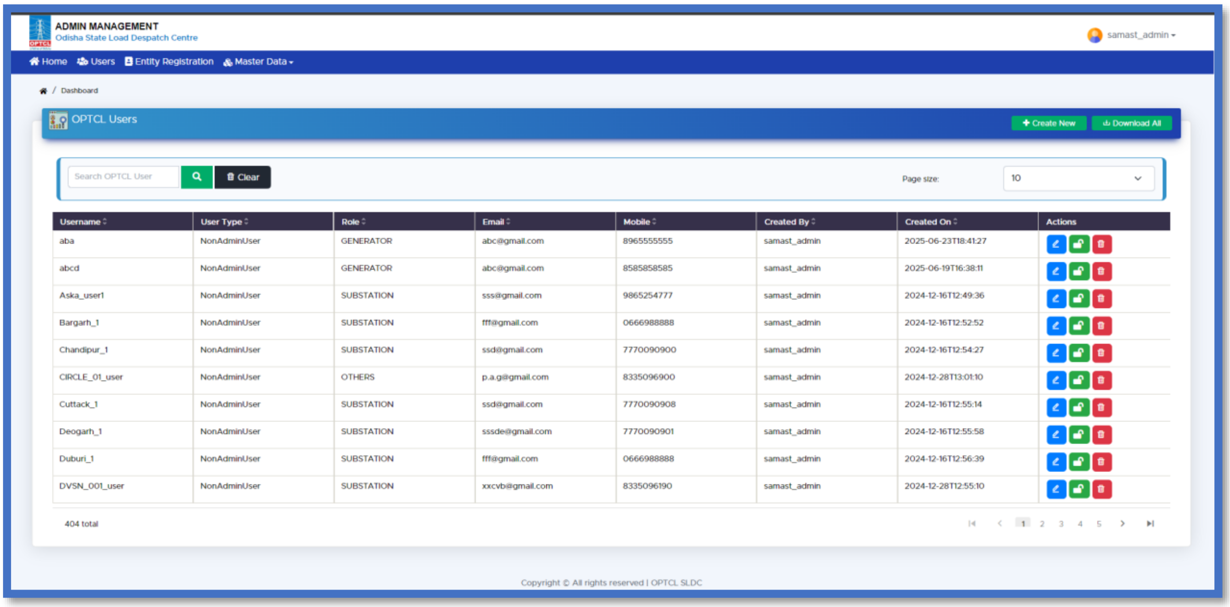
✅ Summary of 6.1 – Admin User Actions

Function	Access	Description
Create New User	✅ Admin Only	Add a new user and assign role/module access
Edit User	✅ Admin Only	Update user details and permissions
Delete User	✅ Admin Only	Remove user from the system
Lock/Unlock User	✅ Admin Only	Temporarily disable or reactivate a user
Change Page Size	✅ Admin Only	Choose between 10, 50, 100, All
Download All Users	✅ Admin Only	Export full user list to Excel
Search User	✅ Admin Only	Quickly find a specific user using the search box

---

🖼️ *User Dashboard showing action icons, page size dropdown, Download All button, and search bar*

📌



📘 *6.2 Entity Registration*

🧩 *Purpose of the Entity Registration Page*

*The **Entity Registration** (also known as **Utility Dashboard**) is a key component under the **Admin Management** module. It allows users to **create and manage utility entities** in the OPTCL – SAMAST application.*

*This feature is accessible by **both Admin and Non-Admin users**, but the level of access and visibility is role-based.*

👥 *Access Rights Summary*

User Type	***Access Level***
Admin	*Full access to **view, edit, download, and manage all utilities***
Non-Admin	*Can view and download **only their mapped utility**; can create utility if allowed or rights has been given*

🔄 *Special Behaviour on First Login (Non-Admin Users)*

*If the **Admin user enabled** the option **"Is utility registration required?"** during user creation, then:*

- *On **first login**, the non-admin user will **automatically land on the Entity Registration page** after entering the Admin Management module.*
- *The system will require the user to **register a new utility** before accessing any other functionality.*

✅ *This ensures that a utility is registered for mapping and future operational tasks.*

📝 *Key Functionalities of Entity Registration Page*

📌 *For Admin Users:*

- *View all registered utilities in the system*
- *Edit utility details*
- *Download utility details (individually or all)*
- *Search utilities*
- *Approve, Reject or submitted utilities*
- *Disable any utility*
- *Download Application Fee Paid receipt for any utility*

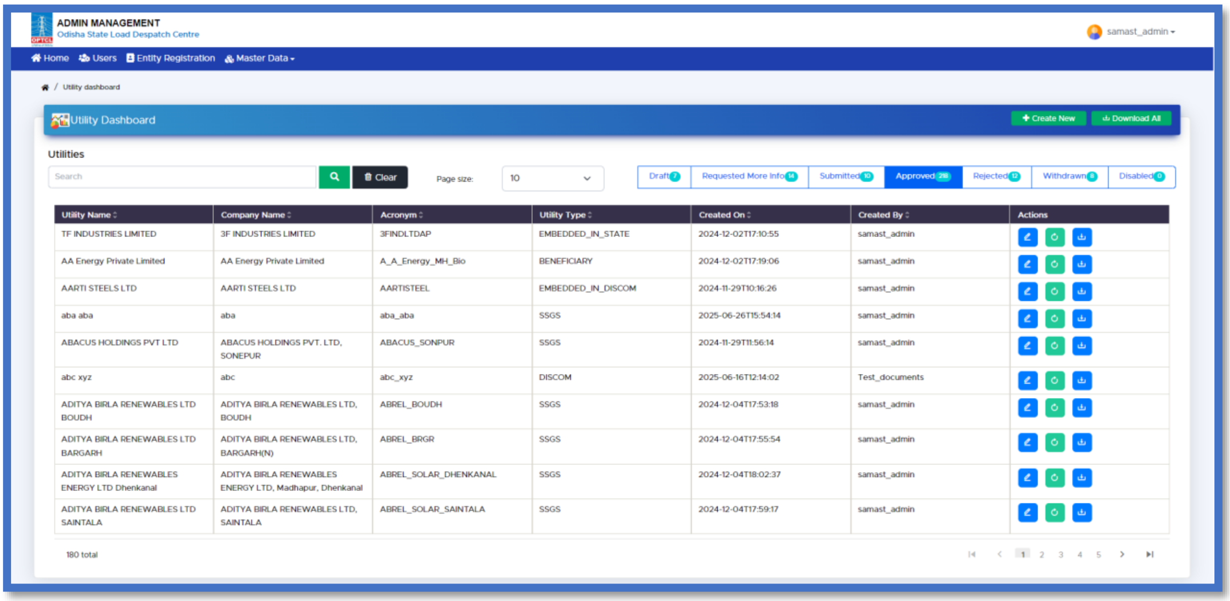
📌 *For Non-Admin Users:*

- *Create a new utility (if first login and required)*
- *Edit their own utility (if permitted)*
- *Search and download details of their own utility only*
- *Download their own **AppFeePaid Receipt***

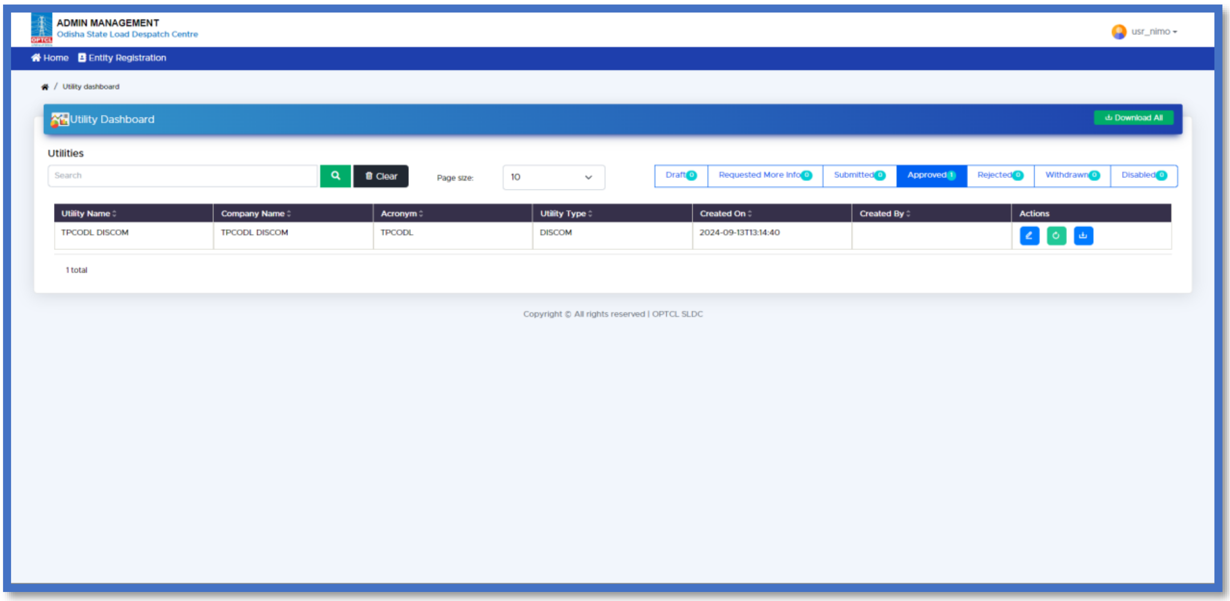
🖱️ *Navigation Path*

*After login → Click on **Admin Management** → User will land on (For non admin user) or navigate to **Entity Registration (Utility Dashboard for the Admin User)***

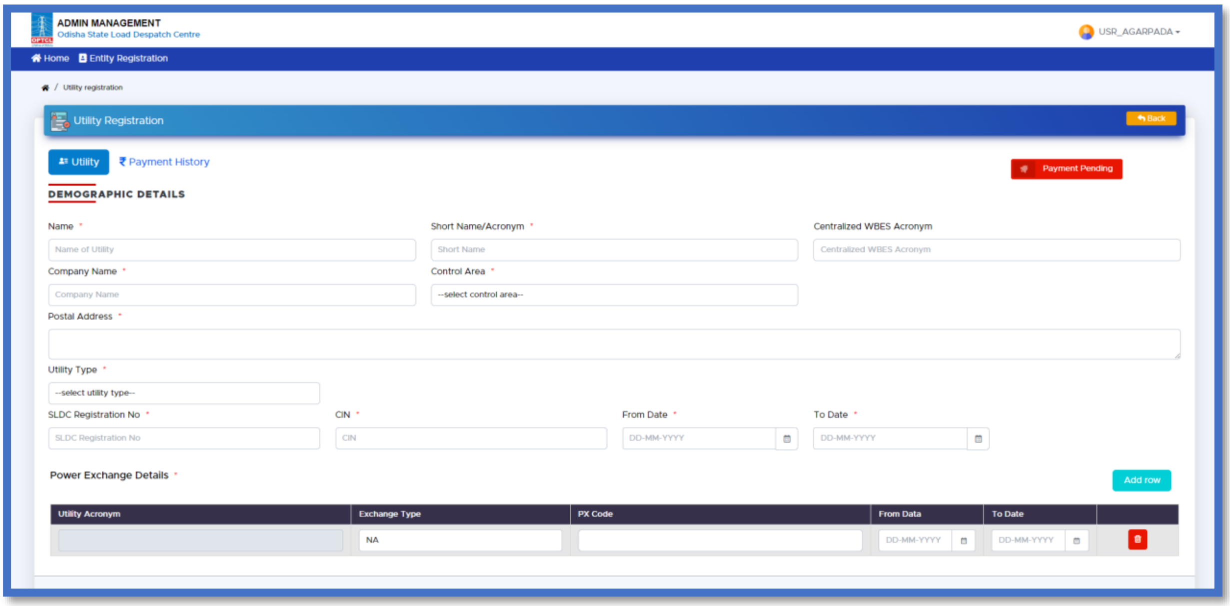
🖼️ *Entity Registration page – Admin view*



Entity Registration page – non-admin view (mapped utility only)



Entity Registration page – non-admin view (utility not mapped)



🧭 *User Interface Overview*

Element	***Description***
Create Utility *Button*	*Appears only if user has rights to create (e.g., on first login for Non-Admin)*
Utility Table	*Lists utilities with columns like Name, Code, Status, Created By, Actions*
Search Field	*Filter utilities by name or Acronym*
Download Option	*Download utility list or individual record as Excel*
Action Column (Admin only)	*Approve, Reject, Edit, Disable utility options*

🔐 *Validation Notes*

- *Utility Acronym must be unique.*
- *Certain fields may be locked once utility is approved.*
- *Admin review is mandatory for utility approval in most cases.*

6.2.1 Create Utility (User Manual)

This user manual provides step-by-step instructions for both Admin and Non-Admin users to create and manage utilities using the Utility Registration module in the OPTCL SLDC Admin Management System.

Overview

Both Admin and Non-Admin users have the ability to:

- *Create a new Utility*
- *Save the Utility as a draft*
- *Submit the Utility for review*

Admin-Only Capabilities:

- *Approve submitted Utility forms*
- *Reject Utility submissions*
- *Request more information from the non-admin*
- *Resubmit Utilities after approval*
- *Disable a Utility*

Non-Admin Capabilities:

- *Withdraw a submitted Utility*
- *Make payment for Utility registration fees*

User Roles & Capabilities

Action	Admin User	Non-Admin User
Create Utility	✅	✅
Save as Draft	✅	✅
Submit Utility	✅	✅
Approve Utility	✅	❌
Reject Utility	✅	❌
Request More Info	✅	❌
Withdraw Utility	❌	✅
Make Payment	❌	✅
Resubmit After Approval	✅	✅

Action	Admin User	Non-Admin User
Disable Utility	✅	❌

Step-by-Step Process for Non-Admin Users

Step 1: Access Utility Registration Page

- *Navigate to:* ***Home > Entity Registration > Utility Registration***

Step 2: Fill in Demographic Details

- ***Name****: Enter Utility Name*
- ***Short Name/Acronym****: Must be unique*
- ***Centralized WBES Acronym****: Optional*
- ***Company Name****
- ***Control Area****: Select from dropdown*
- ***Postal Address****
- ***Utility Type****: Select utility type from dropdown*

<u>Conditional Dropdown Logic Based on Utility Type Selection</u>

📌 ***Description:***
In the ***Demographic Details*** *section of the Utility Registration form, a set of additional dropdown fields are dynamically shown based on the* ***selected Utility Type****. This functionality ensures that only relevant information is captured for each utility category.*

🧩 ***Conditional Logic Flow:***

🔢 SL	Selected Utility Type(s)	Auto-Enabled Dropdowns
1️⃣	*Beneficiary, Discom, State_Util*	✅ *Parent State*
2️⃣	*Embedded in State, CPP, IPP, MPP, SSGS*	✅ *Generator Type,* ✅ *Generator Sub-Type,* ✅ *Parent State*

🔢 SL	***Selected Utility Type(s)***	***Auto-Enabled Dropdowns***
3️⃣	***Embedded in Discom***	✅ ***Generator Type***, ✅ ***Generator Sub-Type***, ✅ ***Parent State***, ✅ ***Parent Discom***
4️⃣	***Virtual_Entity, Transmission_Operator, Trader, System_Operator, SLDC***	🚫 *No additional dropdowns shown*

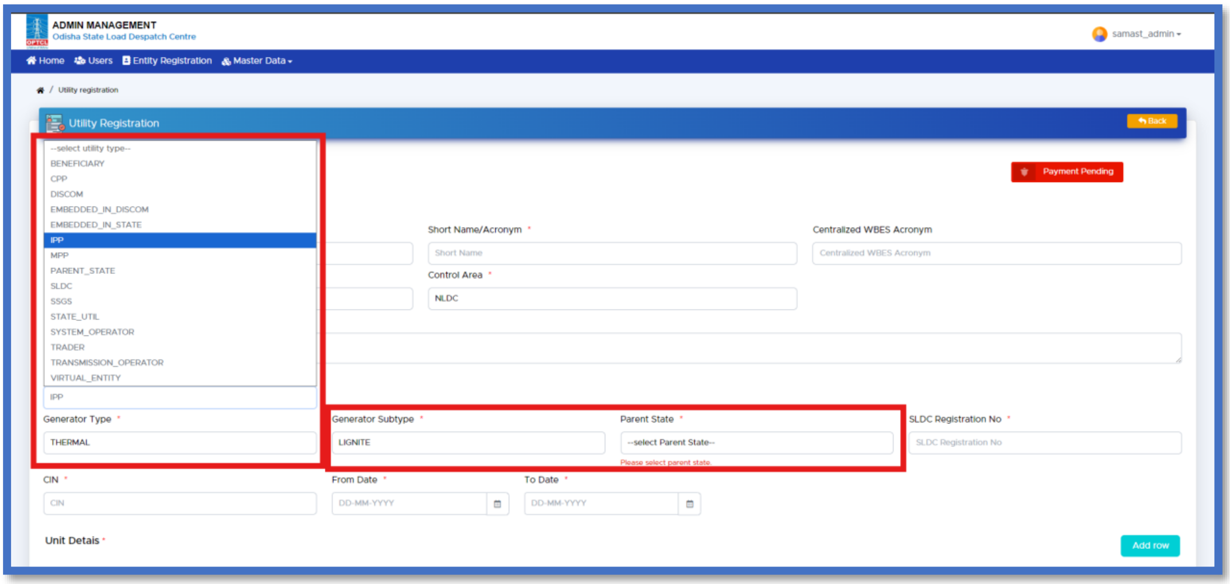
🔍 ***Explanation of Dropdown Fields:***

- ***Parent State****: Refers to the state responsible for the utility.*
- ***Generator Type****: Specifies whether it's Thermal, Hydro, Solar, etc.*
- ***Generator Sub-Type****: Further categorizes the generator. This is applicable for only Hydro, Renewable and Thermal* ***Generator Type*** *(e.g., for Hydro – ROR, Storage, For Renewable – Hybrid, Solar, Wind and Thermal – Coal, Lignite etc).*
- ***Parent Discom****: Indicates the Discom under which the utility is embedded.*

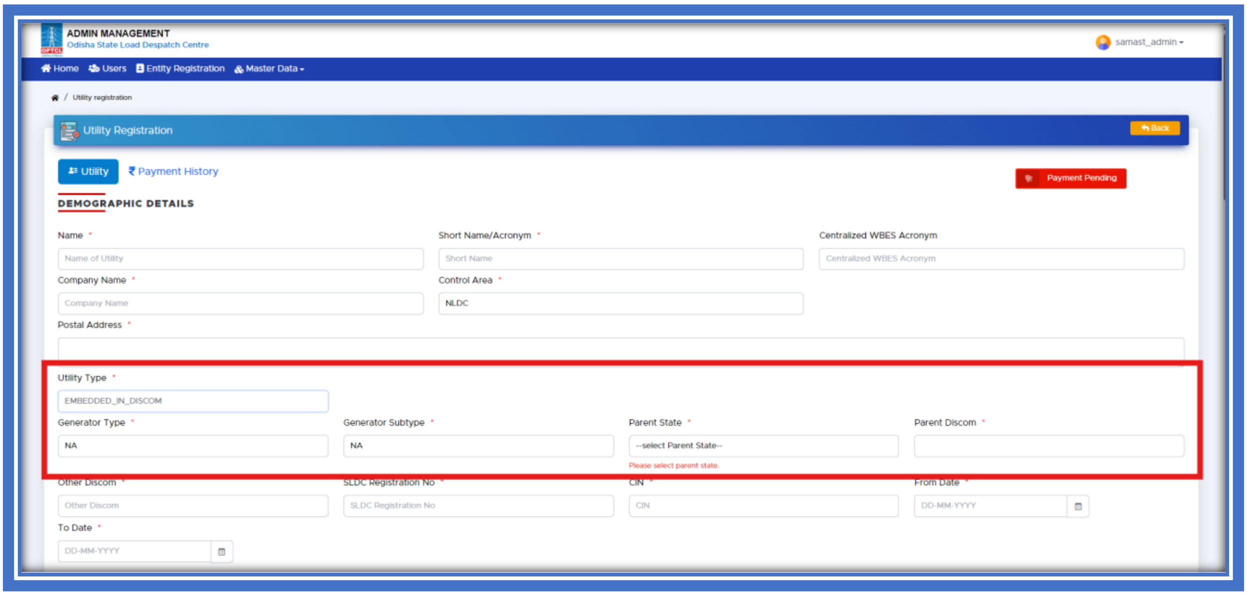
📌 ***User Experience:***

- *When a user selects a* ***Utility Type****, the system automatically detects the type and displays only the required fields to reduce data entry errors and maintain relevance.*
- *This logic applies for* ***both Admin and Non-Admin*** *users during utility creation.*

📷 ***Screenshot Reference:***



For example, selecting **Embedded in Discom** and showing how the four dropdowns appear.



Best Practice for Users:

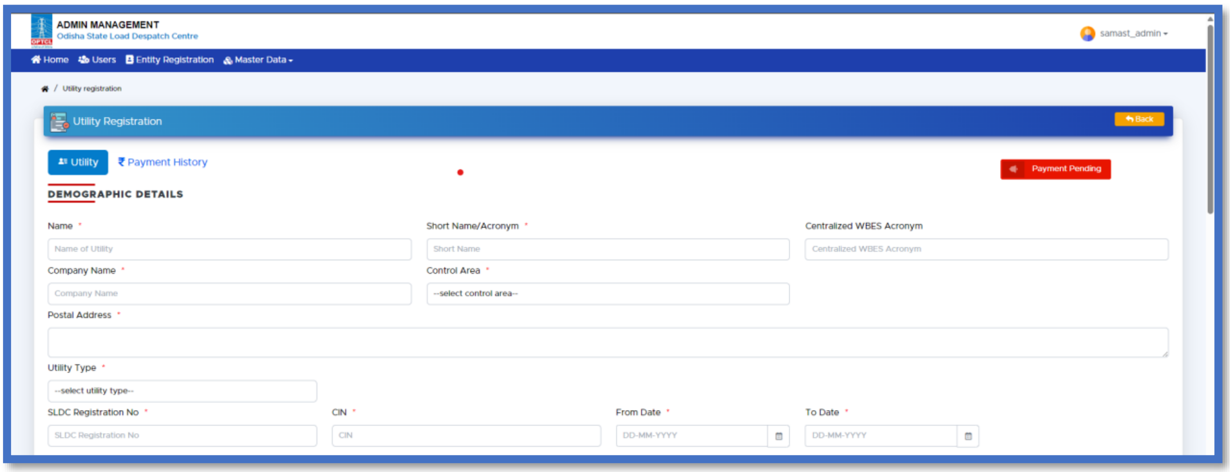
- *Always review the required fields after selecting the **Utility Type**.*

  If unsure about which Utility Type to choose, consult with the system admin or follow OPTCL's internal guidelines.

- ***SLDC Registration No.****
- ***CIN****

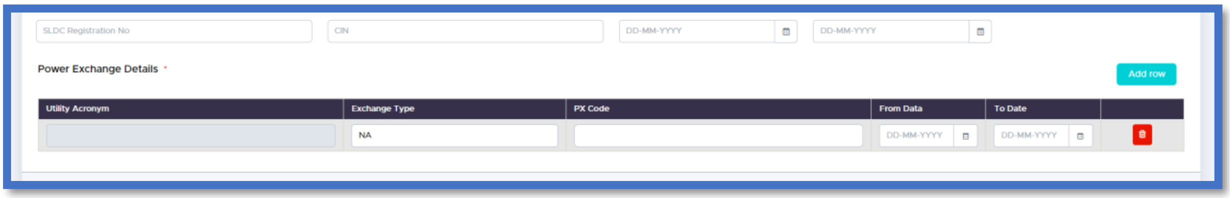
- ***From Date* / To Date****

Demographic Details Section Screenshot



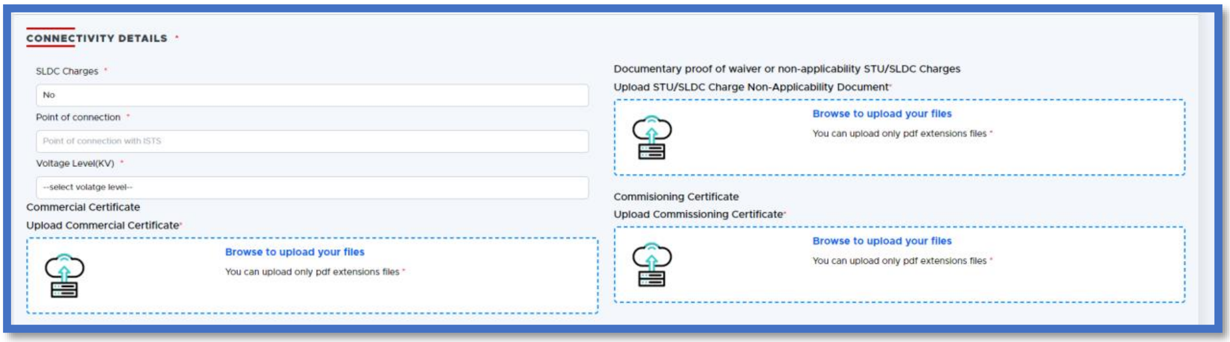
Step 3: Fill in Power Exchange Details

- ***Utility Acronym, Exchange Type, PX Code, From Date, To Date***
- *Use **Add Row** to add more entries*



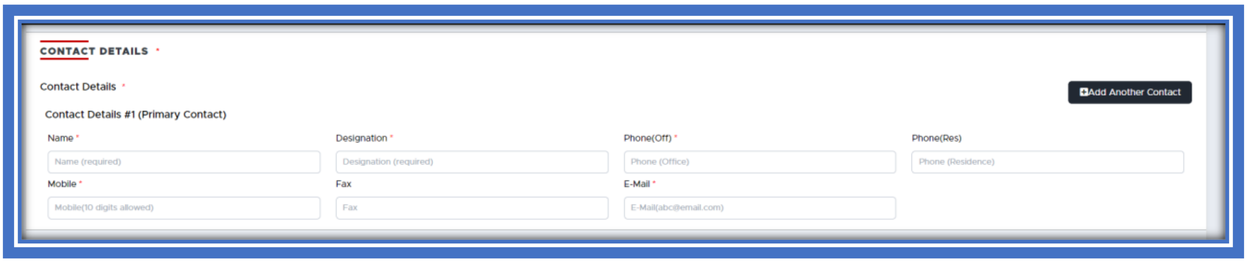
Step 4: Fill in Connectivity Details

- ***SLDC Charges*****: Yes/No*
- ***Point of Connection****
- ***Voltage Level (KV)****
- ***Upload Required Documents****:*
  - *Commercial Certificate**
  - *STU/SLDC Charge Non-Applicability Document**
  - *Commissioning Certificate**



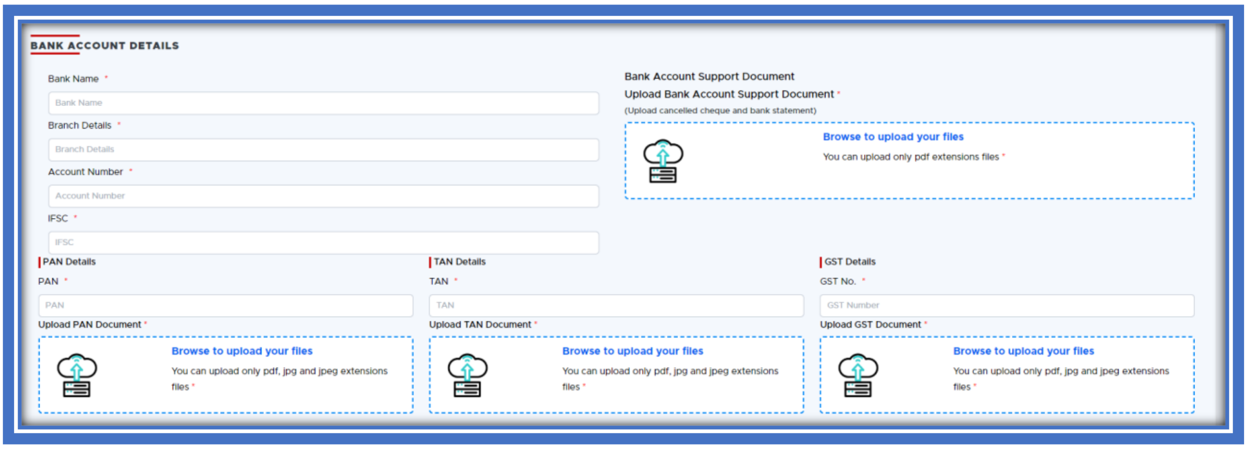
Step 5: Fill in Contact Details

- ***Primary Contact Name, Designation, Mobile, Office Phone, Residence Phone, Email, Fax****
- *Click **Add Another Contact** to include more contacts*



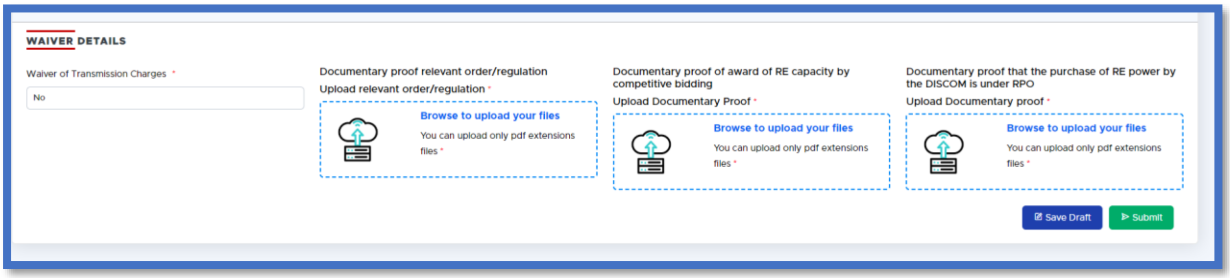
Step 6: Fill in Bank Account Details

- ***Bank Name****
- ***Branch Details****
- ***Account Number****
- ***IFSC****
- ***PAN & Upload PAN Document****
- ***TAN & Upload TAN Document****
- ***GST Number & Upload GST Document****
- ***Upload Bank Account Support Document**** *(Cancelled cheque or bank statement)*



Step 7: Fill in Waiver Details

- ***Waiver of Transmission Charges****: Yes/No*
- ***Upload Supporting Documents****:*
  - *Relevant Orders/Regulations*
  - *Competitive Bidding Proof*
  - *Proof of RPO compliance*



Actions by Non-Admin Users

Save as Draft

- *Click **Save Draft** to save the Utility with partial or complete data*
- *Appears in the **Draft** tab on Utility Dashboard*

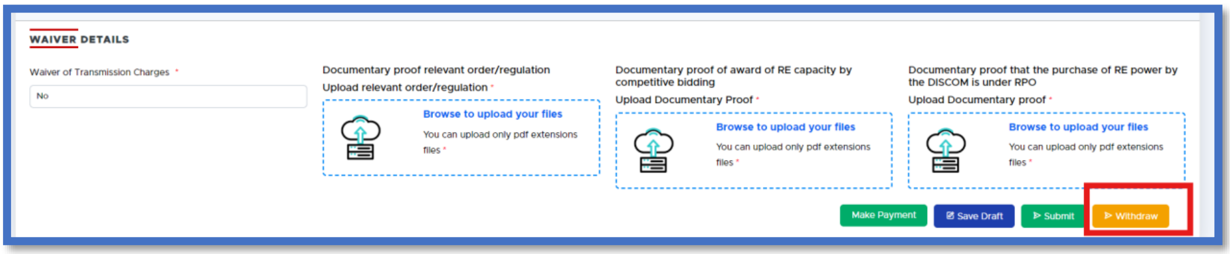
Submit Utility

- *Click **Submit** to forward the Utility for Admin review*

- *Moves to **Submitted** tab*

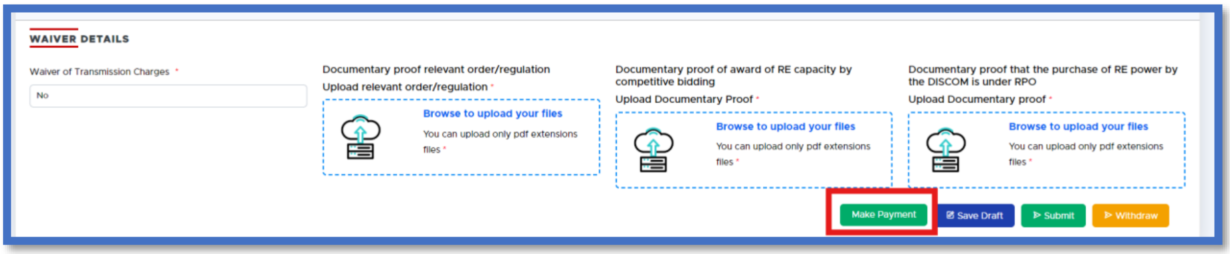
Withdraw Utility

- *Withdraw submitted Utility if necessary*
- *Appears under the **Withdrawn** tab*



Make Payment

- *Payment option available at the **Draft** stage*
- *Mandatory before submission*



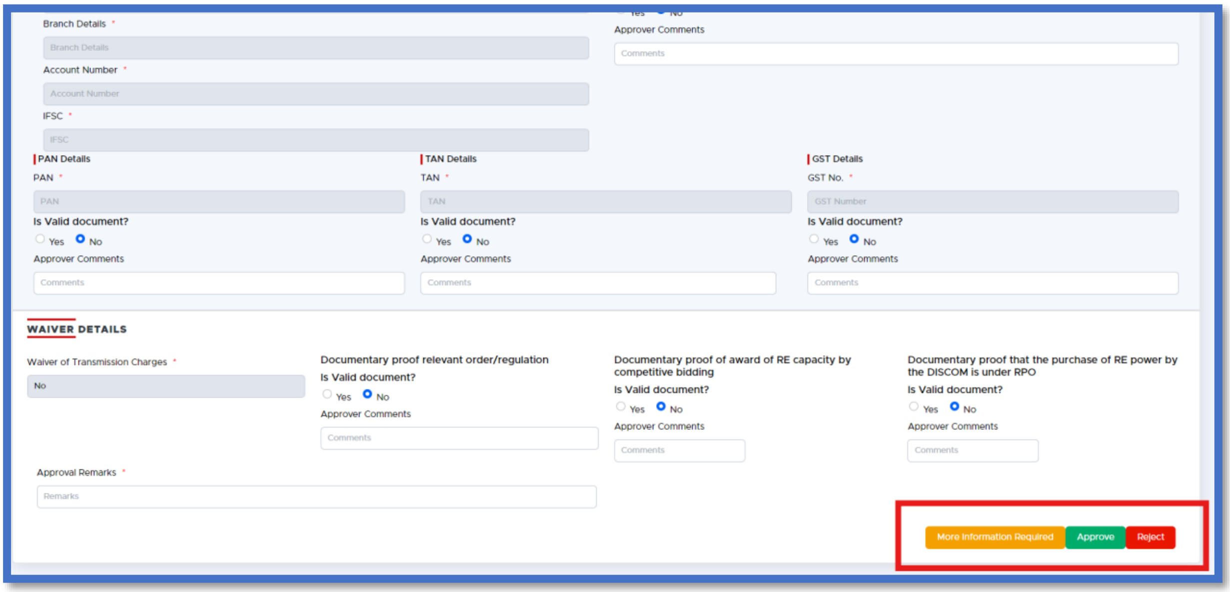
Actions by Admin Users

Review Submitted Utilities

- *Review Utilities under the **Submitted** tab*

Approve Utility

- *Add **Approval Remarks***
- *Moves to the **Approved** tab*



Reject Utility

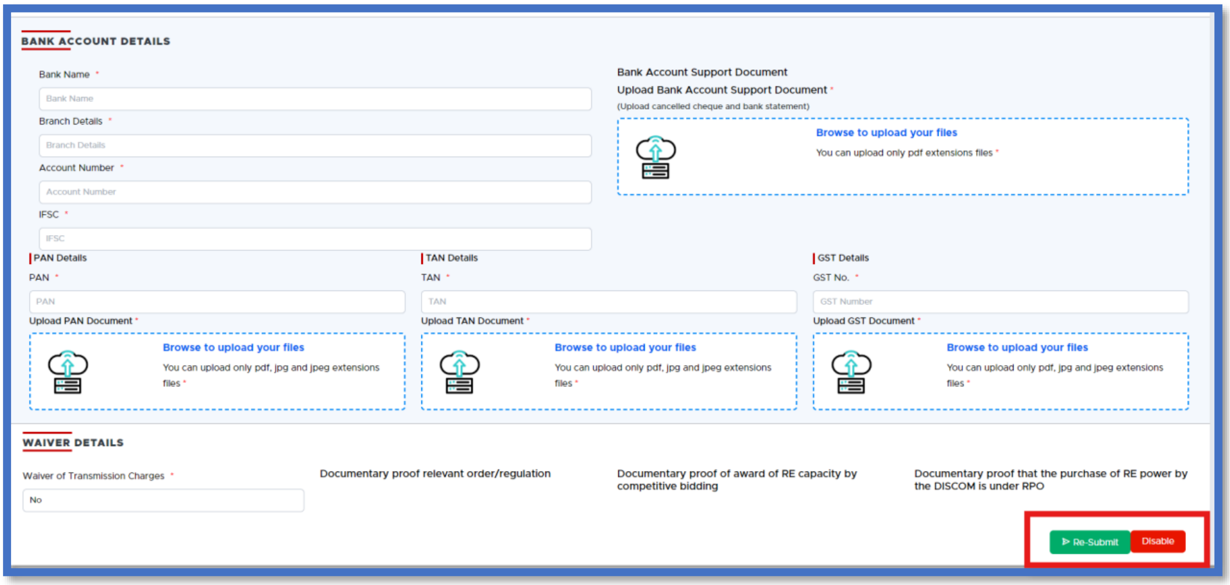
- *Reject Utility if not compliant*
- *Appears in **Rejected** tab*

Request More Information

- *Provide remarks for clarification*
- *Utility moves to **Requested More Info** tab*

Resubmit Utility (Post-Approval)

- *Admin can make corrections and resubmit Utility*



Disable Utility

- *Admin can disable Utilities as required*

Utility Workflow Tabs

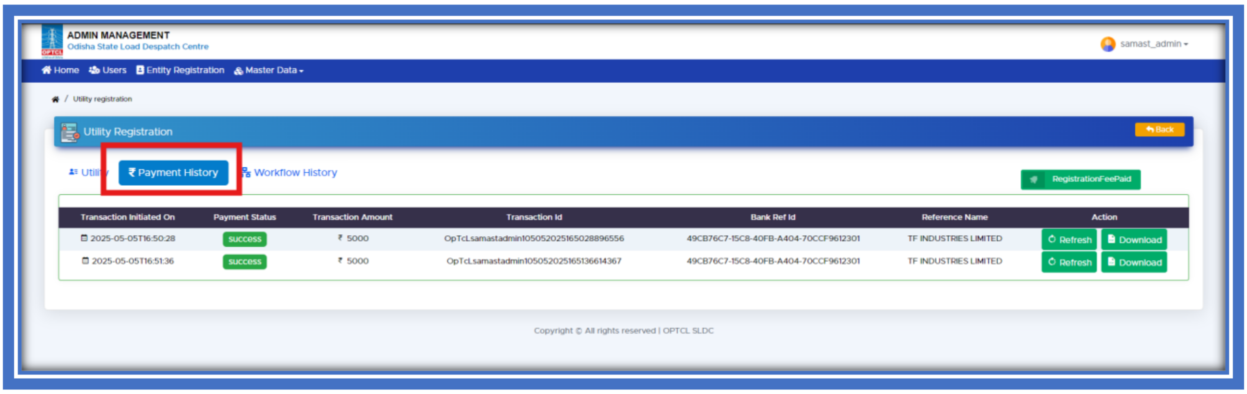
- ***Draft*** *– Saved by Admin/Non-Admin before submission*
- ***Submitted*** *– Sent for Admin review*
- ***Withdrawn*** *– Withdrawn by Non-Admin*
- ***Approved*** *– Approved by Admin*
- ***Rejected*** *– Rejected by Admin*
- ***Requested More Info*** *– Sent back to non-admin for more data*

Note:

- *All mandatory fields are marked with an asterisk (*).*
- *Only* ***PDF***, ***JPG***, *or* ***JPEG*** *formats are accepted for uploads.*
- *The process ensures only verified Utilities are approved and operational.*

6.2.2. Payment History (Sub-tab)

📌 ***"Payment History" Tab Screenshot***



- *This tab displays a **transparent transaction log** related to **Utility Registration Fee payments**.*
- *It is accessible regardless of the utility's stage: **Draft, Final Submitted, Approved** etc.*

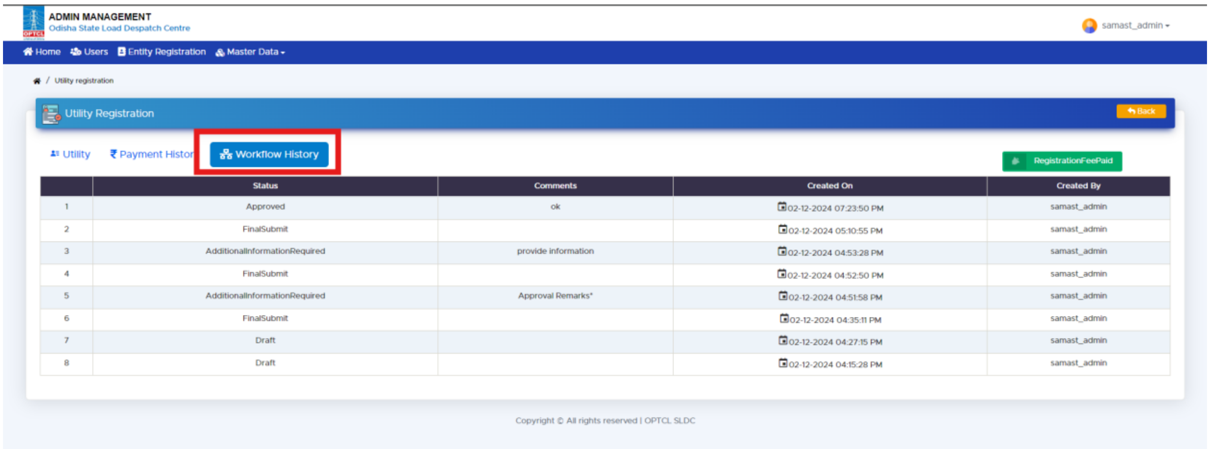
Key Features:

- ***Transaction Details Available:***
  - *Transaction Initiated On*
  - *Payment Status (Success, Failed)*
  - *Transaction ID*
  - *Bank Reference ID*
  - *Reference Name*
- ✅ ***Download Receipt:** Users can download the payment receipt by clicking the **Download** button.*
- 🔄 ***Refresh Option:** The **Refresh** button allows users to fetch the latest status of a transaction.*
- 🟢 *The green **RegistrationFeePaid** label on the top-right confirms successful payment status.*

*This section improves **transparency and traceability** of utility registration payments.*

6.2.3. Workflow History (Sub-tab)

📌 ***"Workflow History" Tab Screenshot***



*This section provides a full **audit trail** of the utility registration process.*

Key Information Displayed:

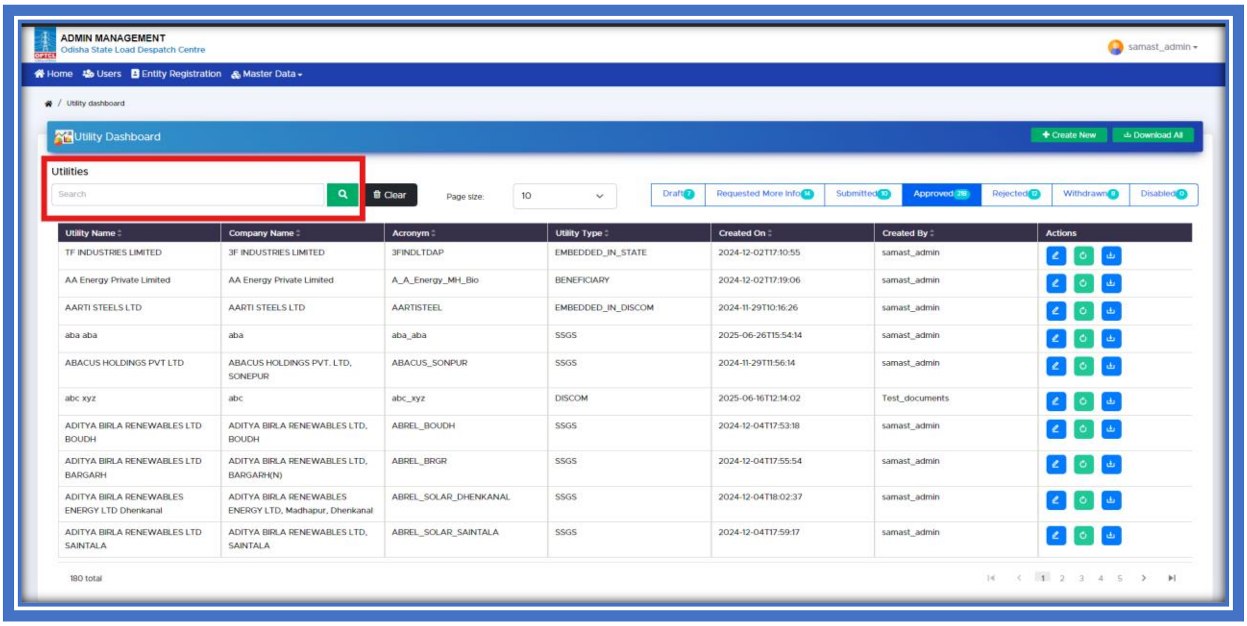
Column	***Description***
Status	*Displays workflow steps: Draft, Final Submit, Additional Information Required, Approved, etc.*
Comments	*Shows remarks by Admin (e.g., "Provide Info", "Approval Remarks")*
Created On	*Time stamp of each step*
Created By	*Username who performed the step*

*This tab ensures full **visibility of approval workflows** to the user, indicating:*

- *Who created the utility*
- *Who made modifications*
- *Who approved or requested changes*
- *Timeline of each workflow transition*

6.2.4. Search Utility by using the Search Field

📌 ***Search Field Screenshot:** highlighting the **Search** field at the top of the Utility Dashboard page.*



Purpose:

*The **Search** field allows users to quickly find specific utilities using **partial or full keywords**, such as:*

- *Utility Name*
- *Company Name*
- *Acronym*

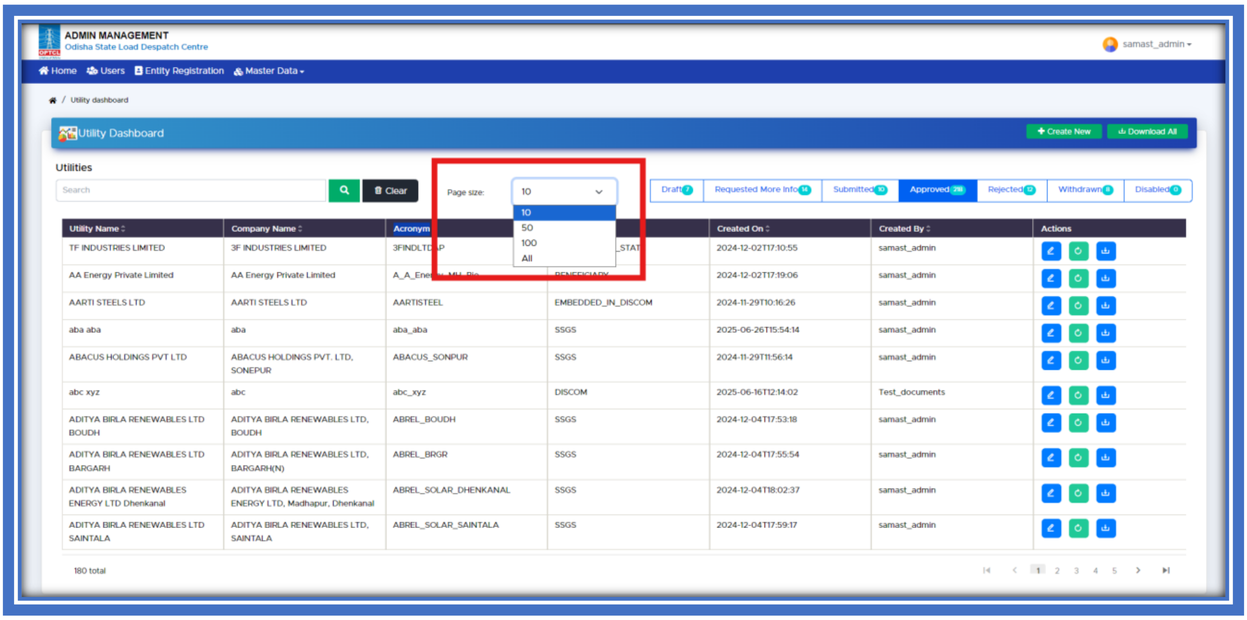
Features:

- *It supports case-**insensitive keyword search**.*
- *As you type, the result list gets dynamically filtered.*
- *Useful when many utilities exist and scrolling is inefficient.*

🟡 ***Tip**: Ideal for Non-Admin users to locate only their mapped utilities.*

6.2.5. Page Size for Viewing More Utilities

📌 *Screenshot of the Page Size: showing the **"Page Size" dropdown** at the Middle of the table listing utilities.*



Purpose:
Allows the user to control how many utilities are displayed per page. Available options typically include:

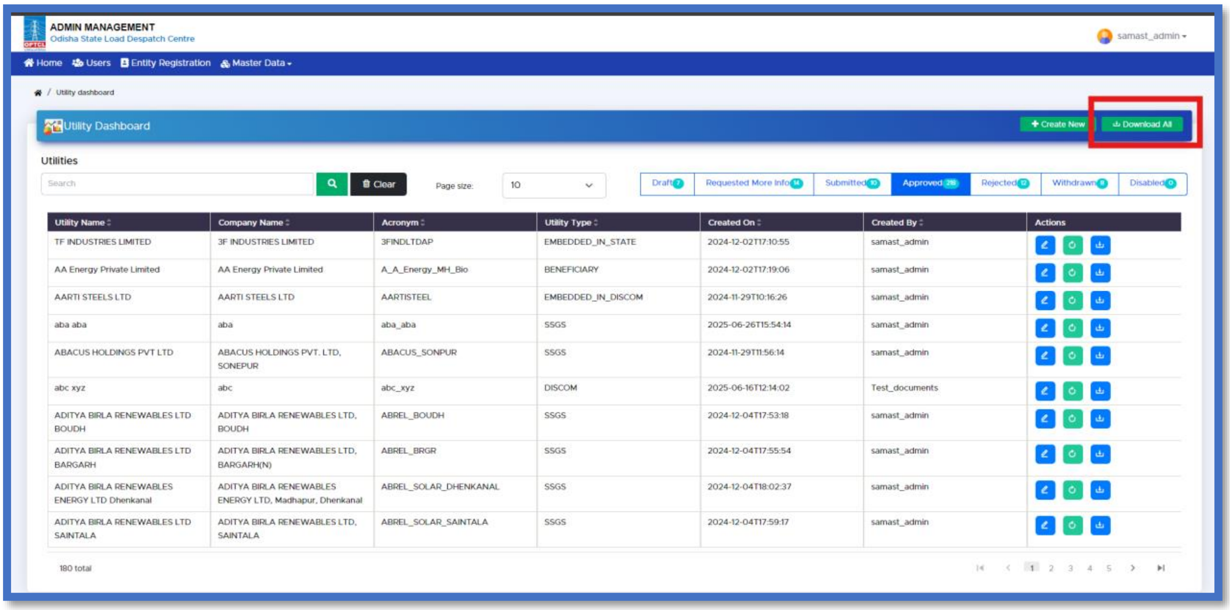
- *10, 25, 50, 100, All*

Use Case:

- *Useful for Admin users with large datasets.*
- *Improves ease of viewing by adjusting pagination based on screen size and preference.*

Note: *Changing the page size doesn't affect filtering or export functionality.*

6.2.6. Download All Created Utility List in Excel



Purpose:

*This option lets the user **export the entire list of utilities** (based on role access) into an **Excel (.xlsx)** file.*

Features:

- *Exports all visible utility metadata: Entity Name, Type, Parent State, Created By, Status, etc.*
- *Available for both Admin and Non-Admin users (restricted to mapped utilities for non-admin).*
- *Instant download on clicks.*

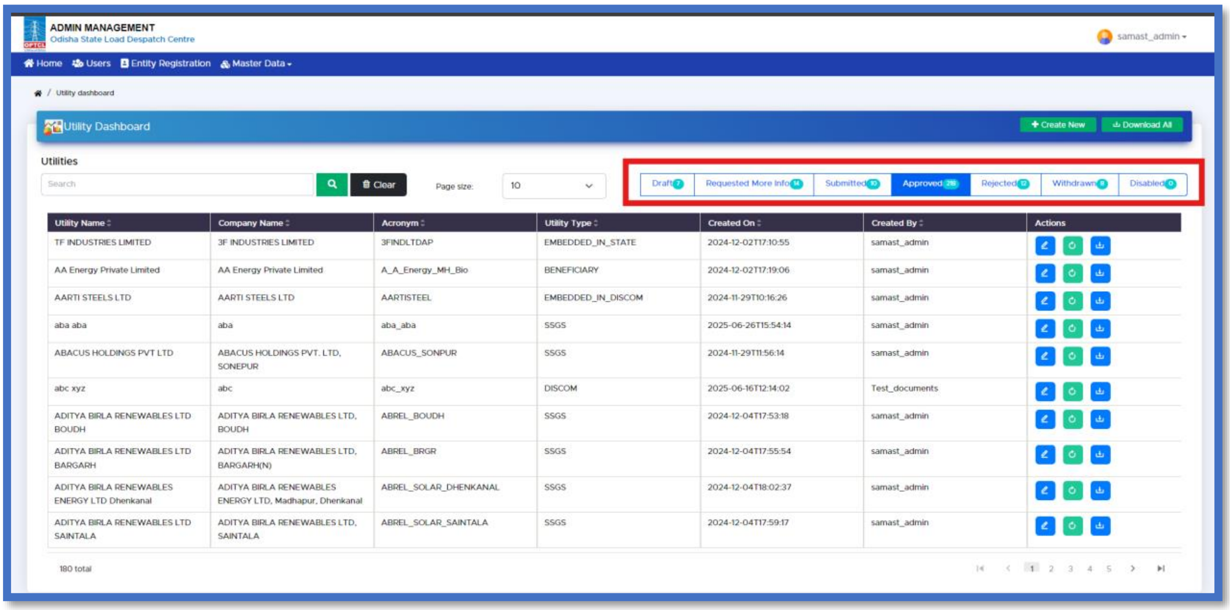
✅ ***Best For***:

- *Reporting*
- *Internal audits*
- *Offline backup*

6.2.7. Tab-wise Utility Status Explanation

📌 ***Suggested Screenshot**: A full-width image showing **status tabs** like: Draft, Requested More Info, Submitted, Approved, Rejected, Withdrawn, and Disabled.*

*Each tab represents a stage in the utility workflow. The tabs **filter the list of utilities** based on their current status.*



- *Status Tabs Overview in Utility Dashboard:*

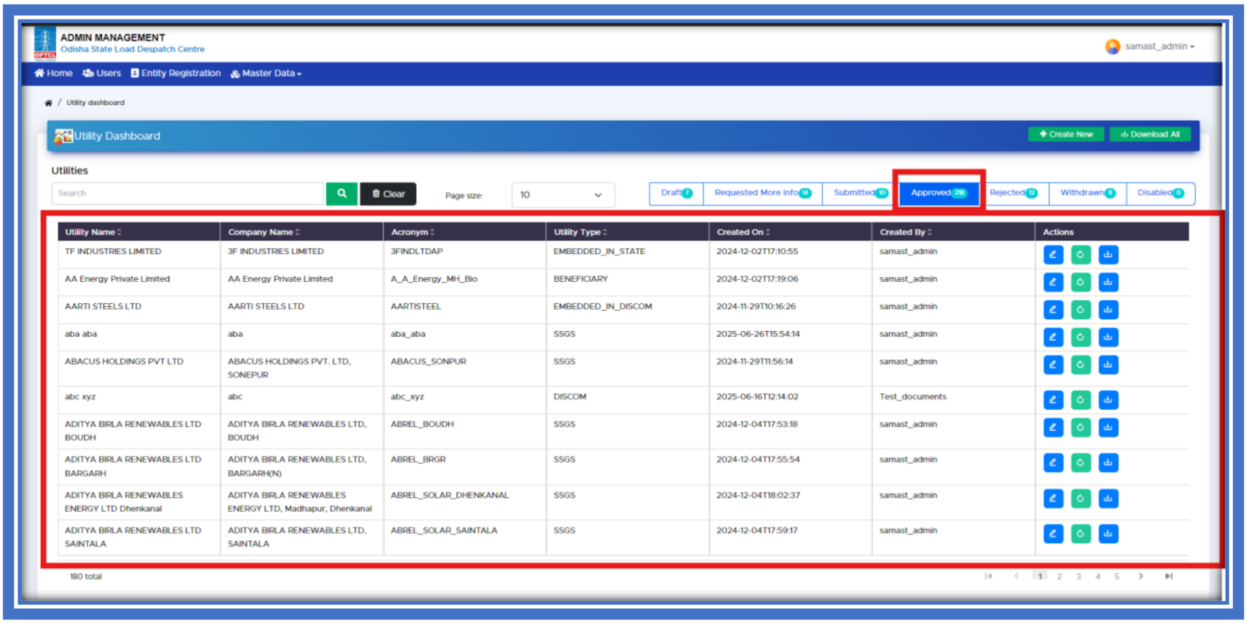
Tab Name	***Explanation***
Draft	*Utilities saved but not yet submitted by user. Editable.*
Requested More Info	*Admin has returned the utility for additional clarification. User must edit and re-submit.*
Submitted	*Utility is sent for Admin approval. Editing is disabled until acted upon.*
Approved	*Finalized and accepted utility. Appears in the operational list.*
Rejected	*Admin has declined the utility. Cannot be reused.*
Withdrawn	*User has voluntarily withdrawn the utility before Admin action.*
Disabled	*Utility was previously approved but is now disabled by Admin (non-operational).*

🔵 ***Note****: Only* ***Admin users*** *can see all statuses. Non-Admins see tabs applicable to their submitted/mapped utilities.*

✅ 🔐 ***Important Display Logic (Auto-Filter):***

Whenever any Admin or Non-Admin user accesses the "Utility Dashboard" or "Entity Registration" page, only the list of utilities with "Approved" status will be shown by default.

🖼️



This default behaviour ensures:

- *Users see only operational and active utilities at first glance*
- *It avoids confusion caused by seeing Draft or Inactive utilities*
- *For non-admin users, only the approved utilities associated with them will be visible*

📘 *6.3. Master Data (Charge Master)*

🔷 *Module Overview*

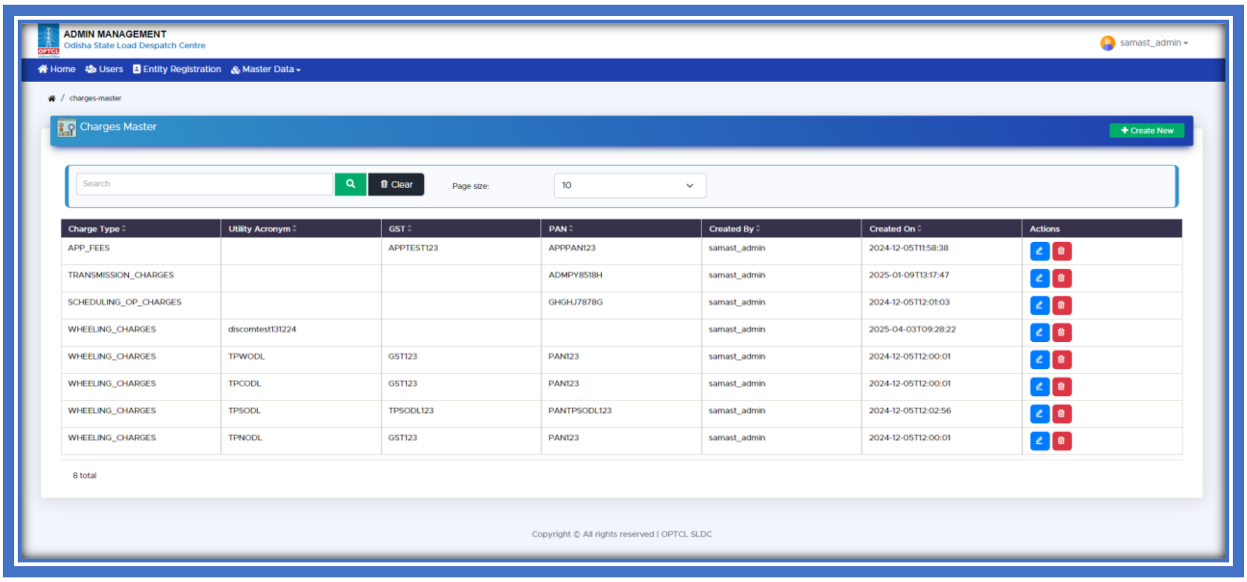
- ***Module Name:*** *Master Data*
- ***Submodule:*** *Charge Master*
- ***Access Level: Admin Users only***
- ***Location:*** *Under the* ***Admin Management*** *menu*

- ***Primary Purpose:***
  The Charge Master module enables admin users to configure and manage various charges that directly feed into the ***Open Access*** *module. These include:*
  - ***APP_FEES***
  - ***TRANSMISSION_CHARGES***
  - ***SCHEDULING_OP_CHARGES***
  - ***INTEREST_CHARGES***
  - ***WHEELING_CHARGES*** *(for TPCODL, TPWODL, TPSODL, TPNODL)*

🔵 ***Note:*** *This module is* ***not visible or accessible*** *to non-admin users.*

📌 *Screenshot of the* Charges Master

🖼️



Charge Type	Utility Acronym	GST	PAN	Created By	Created On	Actions
APP_FEES		APPTEST123	APPPAN123	samast_admin	2024-12-05T11:58:38	
TRANSMISSION_CHARGES			ADMPY8518H	samast_admin	2025-01-09T13:17:47	
SCHEDULING_OP_CHARGES			GHGHJ7878G	samast_admin	2024-12-05T12:01:03	
WHEELING_CHARGES	discomtest131224			samast_admin	2025-04-03T09:28:22	
WHEELING_CHARGES	TPWODL	GST123	PAN123	samast_admin	2024-12-05T12:00:01	
WHEELING_CHARGES	TPCODL	GST123	PAN123	samast_admin	2024-12-05T12:00:01	
WHEELING_CHARGES	TPSODL	TPSODL123	PANTPSODL123	samast_admin	2024-12-05T12:02:56	
WHEELING_CHARGES	TPNODL	GST123	PAN123	samast_admin	2024-12-05T12:00:01	

What it shows:

- *Navigation: Admin Management > Master Data > Charge Master*
- *Existing charge records in a tabular List view*
- *Action buttons:* ***Edit (✏️)*** *and* ***Delete/Trash (🗑️)***
- *Search and Page Size dropdown*
- ***Create New*** *button to add new charge*

Key Features

Admin Functions Available

- *Add new charge entries*
- *Search existing charges*
- *Edit or delete records*
- *Configure charge validity period*
- *Set charge rate (Rs./MWh)*

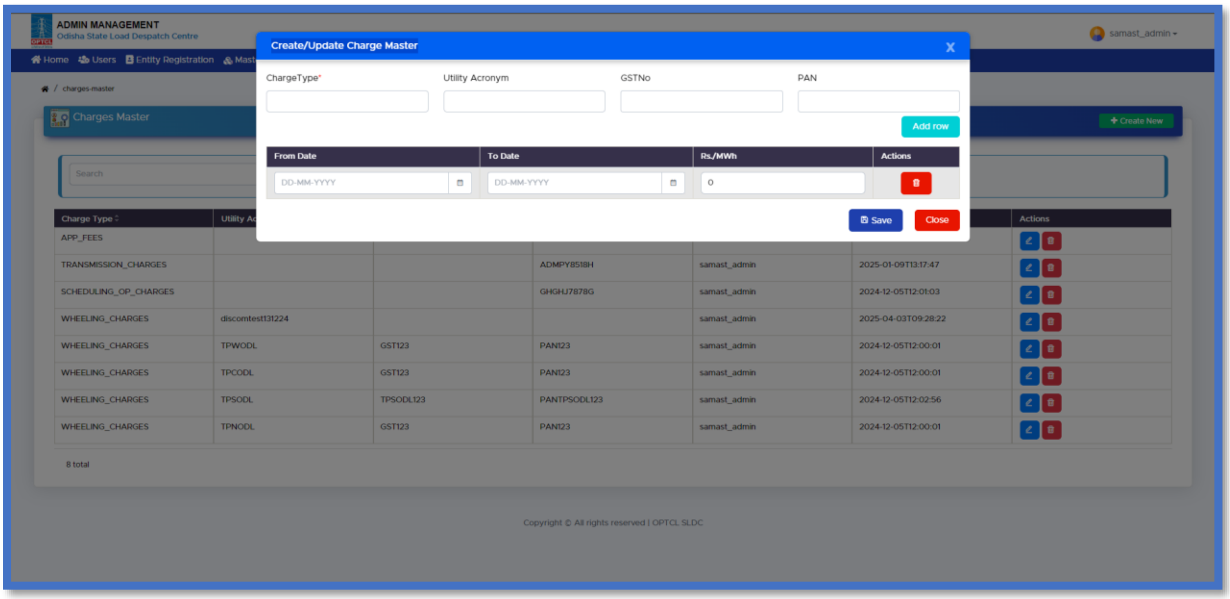
Integration with Open Access

All charges configured here automatically flow into the ***Open Access module*** *during contract creation, ensuring seamless data consistency.*

6.3.1 How to Create a Charge Entry

Click the ***"Create New"*** *button to open the* Create/Update Charge Master *form.*

Screenshot of the Create/Update Charge Master



📝 *Form Fields & Logic*

Field Name	***Description***
Charge Type*	*Select from dropdown. Options: APP_FEES, TRANSMISSION_CHARGES, SCHEDULING_OP_CHARGES, INTEREST_CHARGES, WHEELING_CHARGES*
Utility Acronym	***Only enabled** if **Charge Type = WHEELING_CHARGES**. For other charge types, this field remains **disabled**.*
GST No	*Optional field. GST number of the Utility (non-mandatory).*
PAN	*Optional field. PAN number of the Utility (non-mandatory).*
To Date	*End date of charge validity (mandatory). Format: DD-MM-YYYY*
Rs./MWh	*Charge value in Rupees per Megawatt-hour (mandatory).*

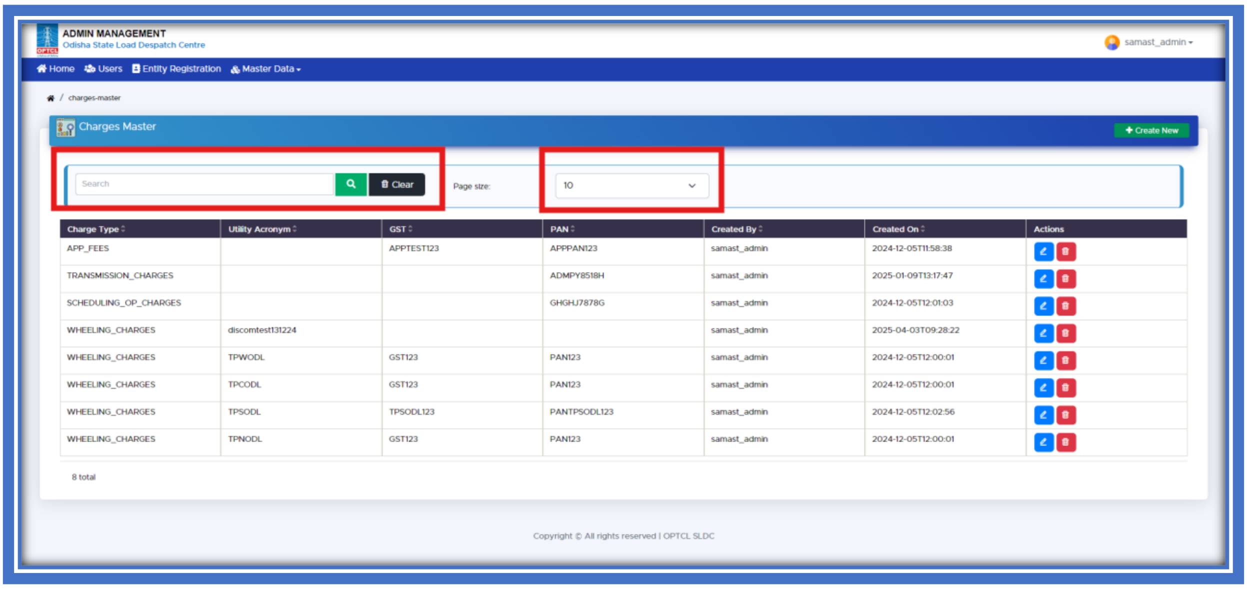
✔ *Click **"Add Row"** to create multiple entries in one go.*

✔ *Use **"Save"** to confirm or **"Close"** to cancel.*

6.3.2. Search and Pagination

📌 *screenshot of the Search and Pagination Field*

🖼



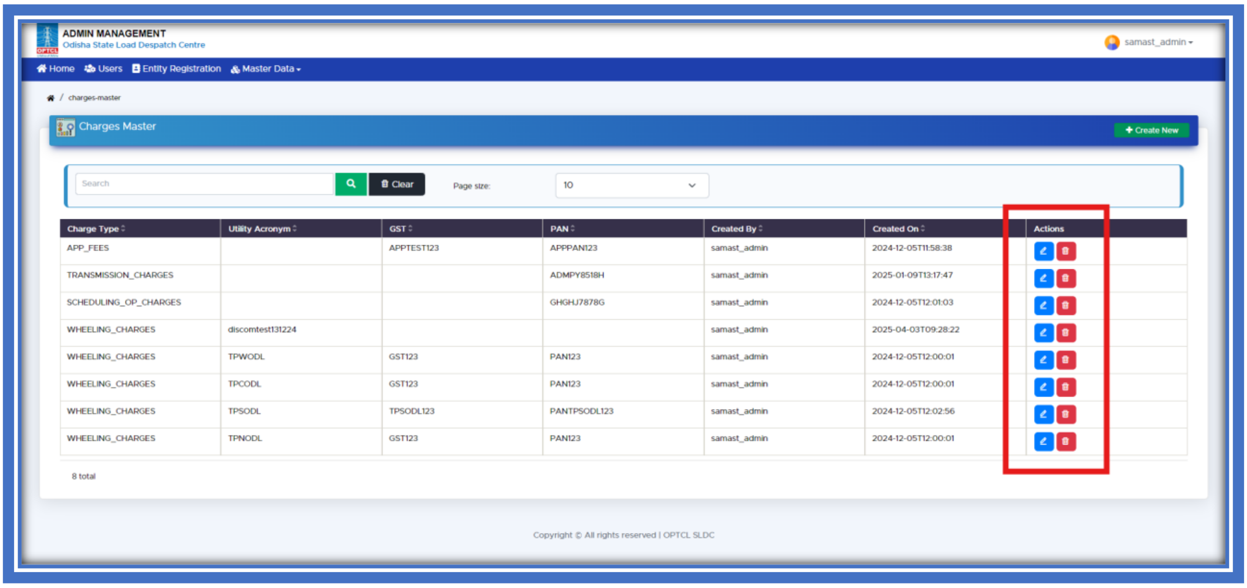
- *Use the **Search field** to find charges by Charge Type, Utility Acronym etc.*
- *Select the **Page Size** to control how many entries are visible.*

6.3.3. Edit/Delete Entries

- *Use the ✏️ **Edit** icon to modify any field, date, or charge value.*
- *Use the 🗑️ **Delete** icon to permanently remove a charge (confirmation prompt shown).*

📌 *screenshot of the **Edit/Delete***

🖼️



6.3.4. Charge Definition Responsibility

- *Only Admin users have the authority to define, update, and delete charges in the Charge Master module.*

📌 All charges such as APP_FEES, TRANSMISSION_CHARGES, SCHEDULING_OP_CHARGES, INTEREST_CHARGES, and WHEELING_CHARGES must be set by Admin.

📤 *Flow to Open Access Module*

*When users (DISCOM or others) initiate contract creation in the **Open Access** module:*

- *Relevant charges are fetched* ***based on Charge Type, Utility (if applicable), and date range****.*
- *Admin-defined Rs./MWh values are auto-populated into calculations and billing.*

⚠️ *Important Notes*

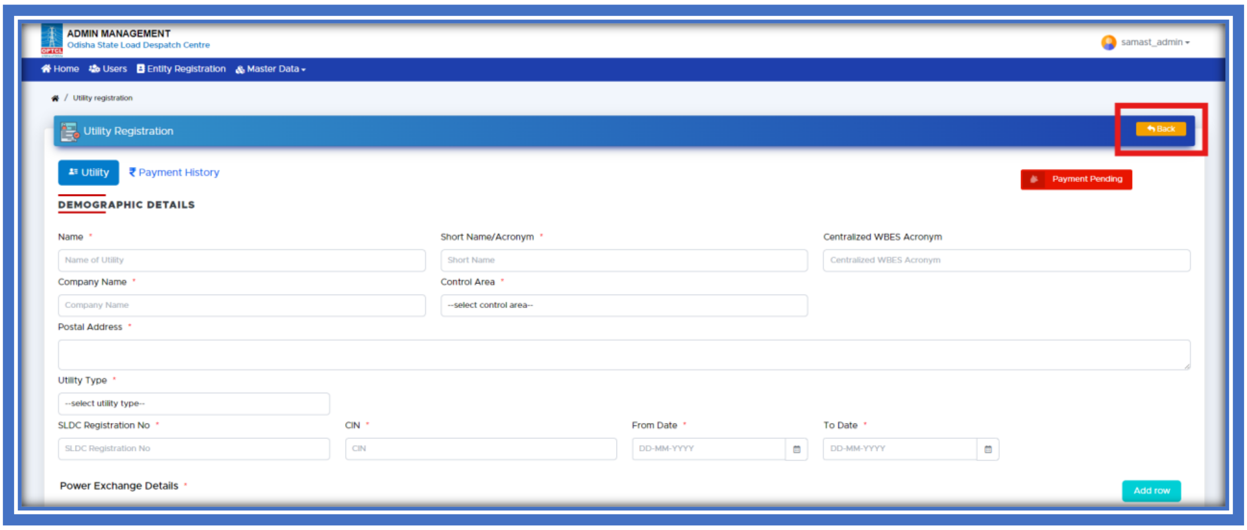
- *WHEELING_CHARGES must be defined* ***for each DISCOM*** *(TPCODL, TPNODL, TPSODL, TPWODL).*
- *Do not leave duplicate entries with overlapping validity periods.*
- *GST No. and PAN are* ***optional*** *but recommended for documentation consistency.*
- *Only* ***WHEELING_CHARGES*** *requires Utility Acronym. Other charge types disable this field automatically.*

✅ *Summary*

Function	***Available to Admin***	***Available to non-admin***
View Master Data	✅ *Yes*	❌ *No*
Create/Edit/Delete Charge	✅ *Yes*	❌ *No*
Open Access Charge Usage	✅ *Auto-integrated*	✅ *Auto-integrated*

🔁 *General Features and User Experience Enhancements*

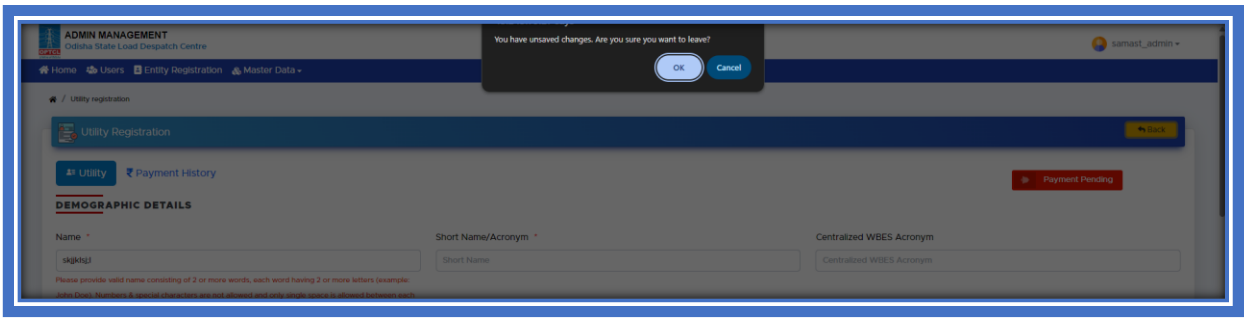
1. ***Back Navigation ("X" Icon) on Every Page:***
    - *All pages in the OPTCL - SAMAST application include a* ***Back*** *option represented by an* ***"X" icon****, typically placed on the top-right corner of the screen.*



- *This allows users to **seamlessly navigate back** to the previous page, improving usability and preventing navigation confusion.*

2. ***Exit/Back Warning on Utility Registration Page:***

   - *As the **Utility Registration** page is long and detail-intensive, if a user clicks the back icon during form filling (either intentionally or mistakenly), the system displays a **warning prompt**.*



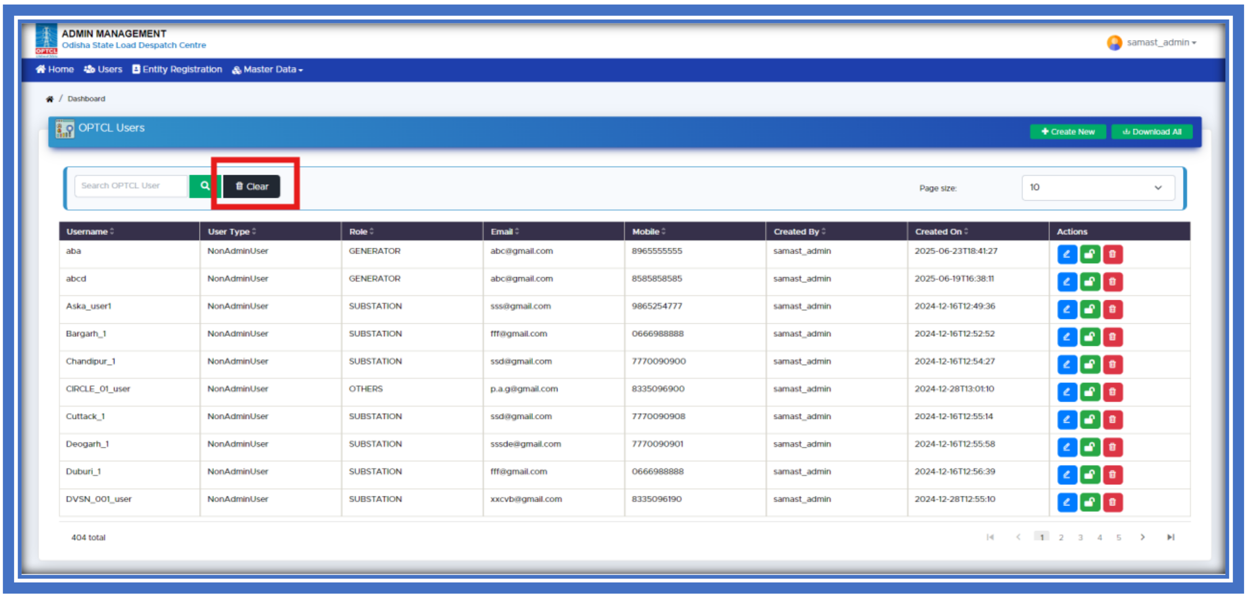
   - *This is to **alert the user** that unsaved data may be lost, helping avoid accidental navigation and ensuring data safety.*

3. ***Download File Location:***

   - *All files downloaded from the application (like user lists, utility lists, charge master data, etc.) are **saved directly to the user's local system** (usually the "Downloads" folder), ensuring easy access for further reference.*
   -

4. ***Clear Button beside Search Field:***

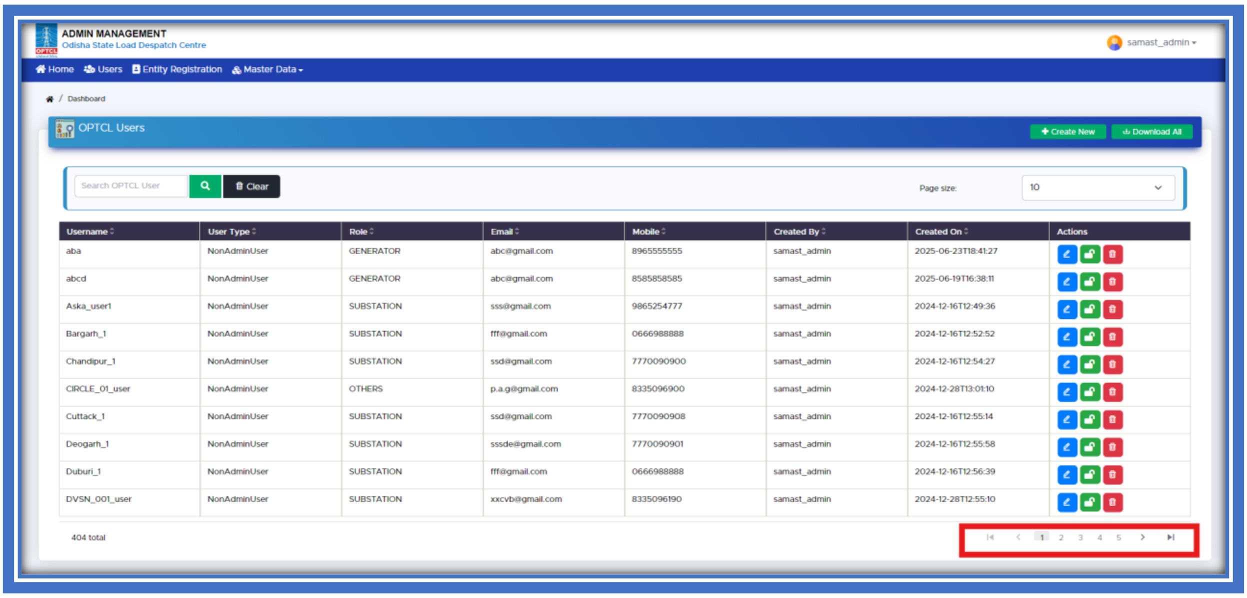
- *Every page that includes a **Search functionality** also provides a **“Clear” button** next to the search field.*



- *This allows the user to **reset the search results instantly**, bringing back the full list view without needing to reload the page.*

5. ***Advanced Pagination (Page Jump Feature):***

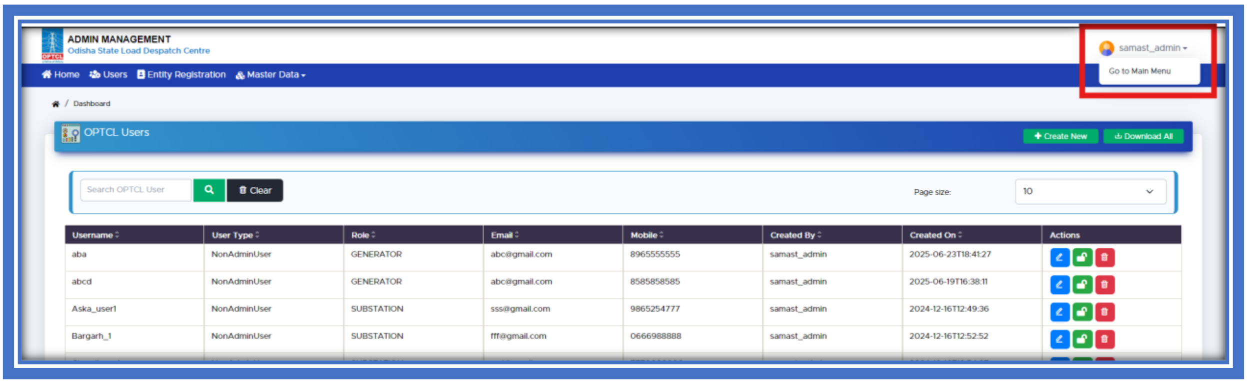
   - *On User Dashboard and Utility Dashboard pages, an **advanced pagination control** is implemented at the bottom of the data table.*
   - *This includes a **Page Jump feature**, allowing users to **directly jump to any page number**, including the first or last page, based on their requirement.*
   - *Data displayed on screen dynamically updates according to the selected page.*



6. Navigation to Main Menu home page from Any Page

*Users can easily return to the **Main Menu** of the **OPTCL - SAMAST application** using the profile dropdown menu located at the **top-right corner** of every page within the **Admin Management module**.*

- *The dropdown displays the **currently logged-in username** (e.g., samast_admin as shown in the screenshot below).*



- *By clicking on the username, a menu appears with the option **"Go to Main Menu."***
- *This feature allows users to **seamlessly navigate back to the main application homepage** from **any page** within the Admin Management module—ensuring a smooth and consistent user experience.*

📌 ***Note:***
The username displayed will dynamically change based on the logged-in user (e.g., abc_user, optcl_admin, etc.).

🔷 ***Admin Management Module – Summary***

*The **Admin Management Module** of the **OPTCL - SAMAST application** is a centralized interface designed to enable efficient administration and control over the registration, maintenance, and access of entities and users. It supports both **Admin** and **Non-Admin** users with intuitive features that simplify navigation, management, and user interaction.*

✅ ***Key Features and Highlights:***

1. ***User-Friendly Dashboard***
   - *Displays a comprehensive list of registered users with details like Username, User Type, Role, Email, Mobile, and Created Date.*
   - *Action buttons for **Edit**, **View**, and **Delete** make user management simple and fast.*
2. ***Advanced Search with Clear Option***
   - *Users can search records using keywords, and the **"Clear"** button allows resetting search filters instantly.*
3. ***Pagination and Jump Navigation***
   - *The dashboard supports **advanced pagination** with a **page jump feature** allowing users to directly navigate to the last or any specific page, ensuring faster access to records.*
4. ***Download Capability***
   - *User data can be easily **downloaded** and saved on the **local system**, ensuring offline access and reporting.*
5. ***Entity & Utility Registration***
   - *Seamless forms for new entity or utility registrations, equipped with dynamic validations.*
   - *A **confirmation/warning message** is triggered when a user attempts to navigate back from an ongoing form to prevent accidental data loss.*
6. ***Back and Close Navigation Support***
   - *Each page includes a **"Back" button** and an **“X” icon** to return to the previous screen, enhancing navigation comfort.*
7. ***Go to Main Menu – From Anywhere***

- *The top-right **user profile menu** (showing the logged-in username) includes a **"Go to Main Menu"** option.*
- *This allows users to return to the **main SAMAST application home** from any page of the Admin Management module.*

8. ***Charges Assigned by Admin***
   - *Any administrative or additional charges (if applicable) will be determined and assigned by the Admin.*

---

*This module ensures **security**, **scalability**, and **efficiency** in managing users and entities. It is built with thoughtful design keeping in mind **user convenience, data integrity**, and **ease of operation** for both technical and non-technical users.*
