2023

FRM User Manual

USER MANUAL DOCUMENT
OPERATOR USER

DSTME | Dubai

Document Revision History

SL No	Name	Date	Reason for Changes	Version
1	Lloyd George	10-Jul-2023	Document Created	Version 1.0.1
2	Sijo Jose	15-Jul-2023	Document Verified	Version 1.0.1

Contents

Document Overview

This manual has been created to provide a comprehensive guide on how to effectively use the FRM software and maximize its potential. Whether a new user or seeking assistance to enhance existing knowledge, this manual will serve as a go-to resource.

The user manual is organized in a logical manner, starting with the basics and gradually moving towards more advanced features. This will allow to build a strong foundation and gradually explore the software's full potential. Additionally, we have included visual aids such as screenshots and diagrams to assist the user in visualizing the processes. It is highly recommend following the manual sequentially to grasp the software's functionalities effectively.

Modules Covered in the document:

1. Transaction Related Module
   a. User management
   b. Correspondence
   c. Request
   d. Task
   e. Contact management

### *User Roles:*

1. Operator User

User Login

Operator user can login to FRM system using a predefined user name and password. Operator User will be having functionality to reset password if the user is created without any source system integration.
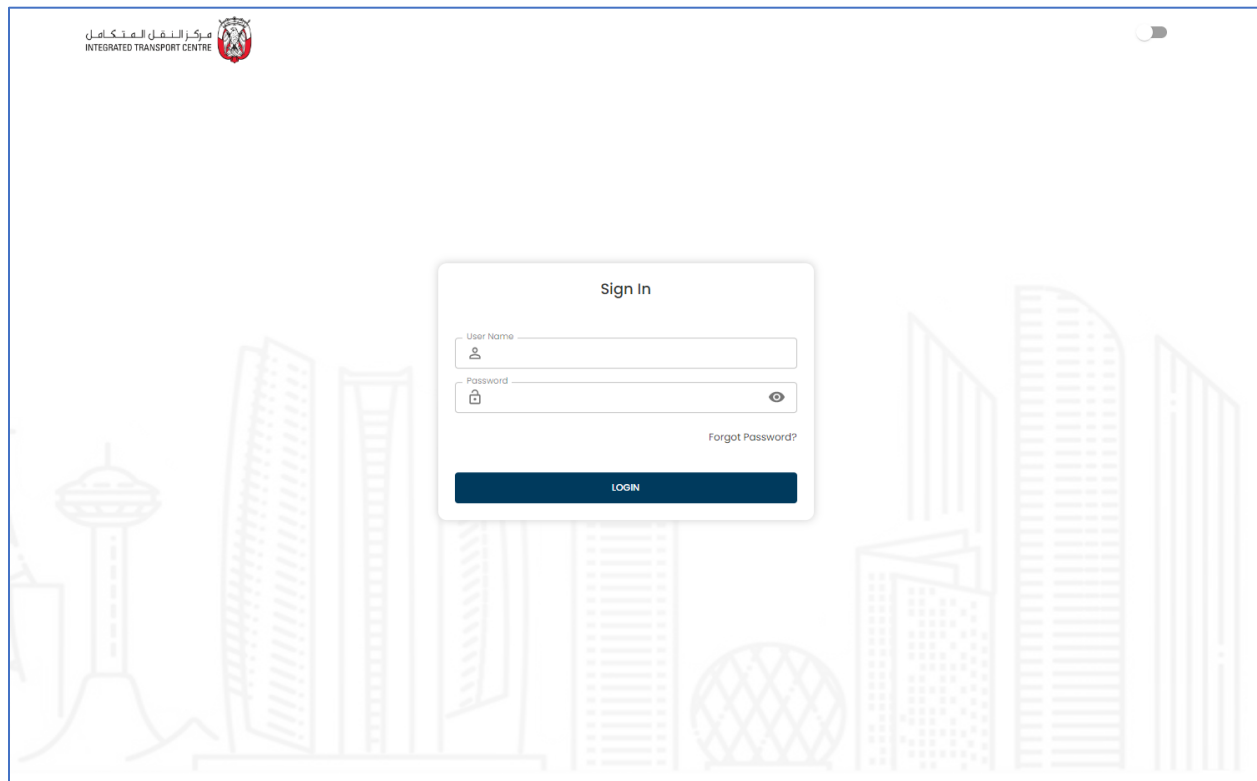

Login page

Steps:

1. Enter the Login username and password

2. Click "Login", system will validate the user access in FRM system, if the user is created with integration with a source system, then the password validation will be done from source system, and verify the user rights in FRM system. Once this validation is completed system will navigate the user to OTP Validation page
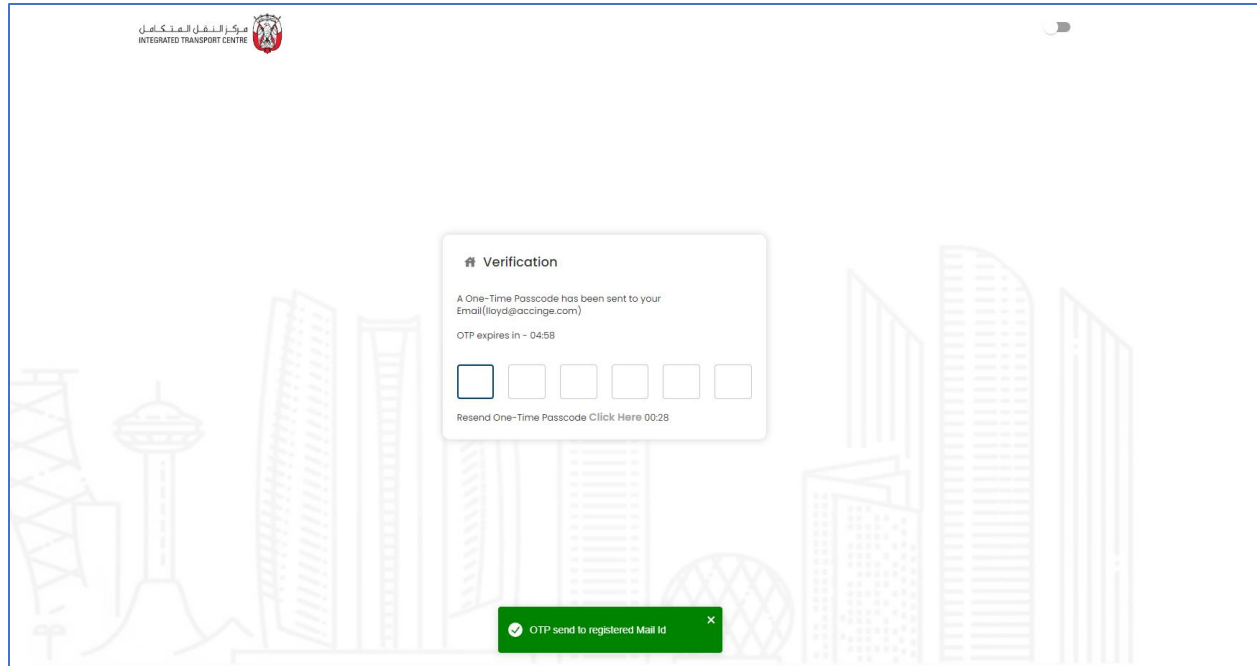
Step 03: OTP will be sent to the user registered mail id. Enter the OTP received in email for the 2-factor authentication. Once the OTP is verified system will navigate the user to login page.

Login Page:

Once the user successfully login, system will navigate to the login home page.
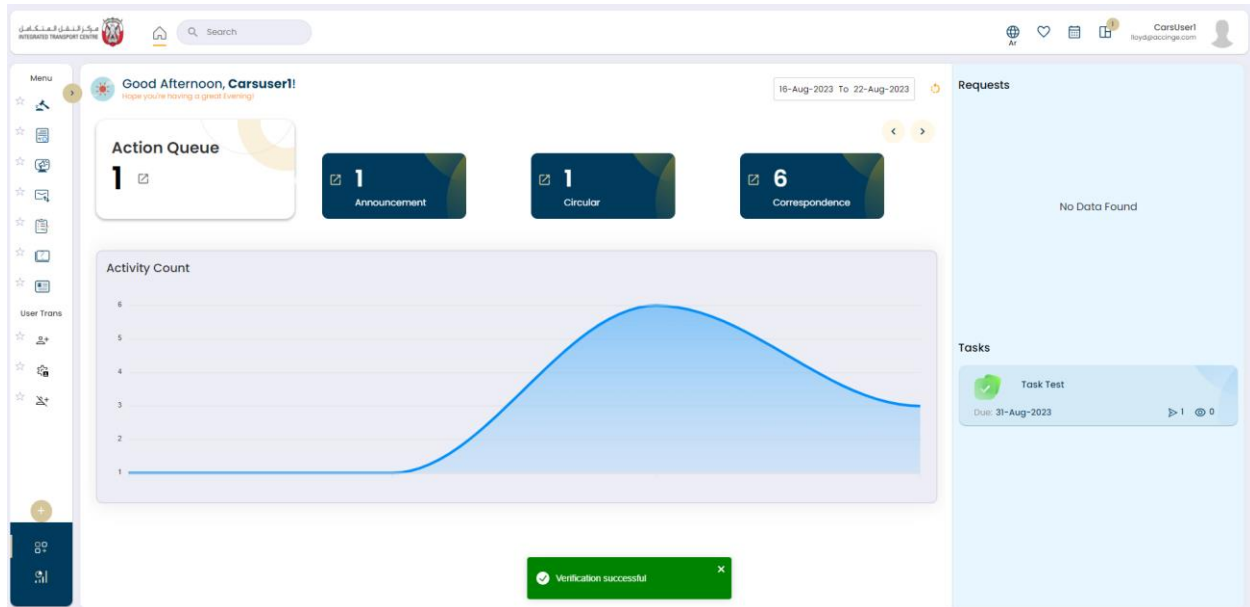
User related data will be shown here in this page.

Home Page Components

This section will describe the functionality of the Main menu Components.

Components of FRM

This image describes the main view components in the FRM system
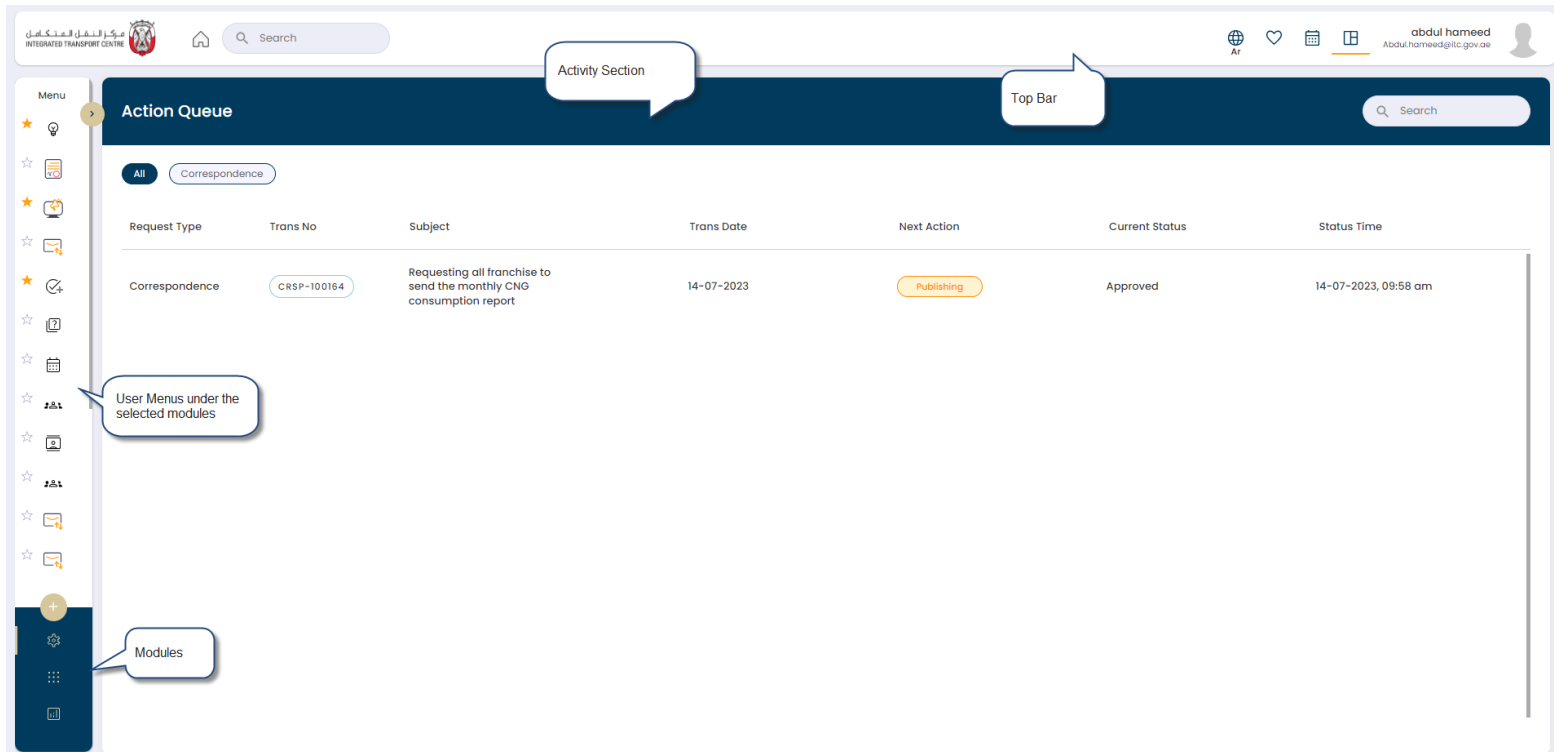
Top menu bar features

Top menu bar shows quick action links for the FRM system. On hovering the mouse on each icon, it will show the menu name.

Details of each icon

⊕ Ar	Language switcher from Arabic to English and English to Arabic
♡	Favorite marked menus
📅	Calendar to display events
⊞	User pending action (My action Queue)
👤	User image update link and logout
⌂	Home Page navigation

Transactions

To navigate to transaction, select the transaction module, this will list the transactions that the user has access to, in the FRM Module.
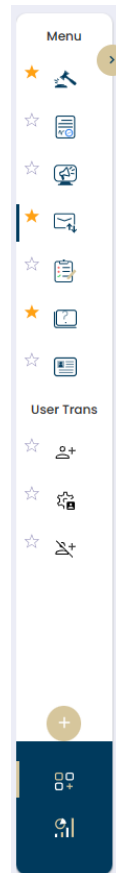
To view the details of the menu, click on menu expand icon to show the menu details.
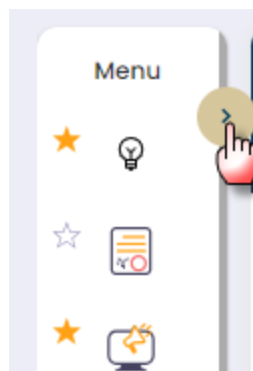
Expanded Menu View
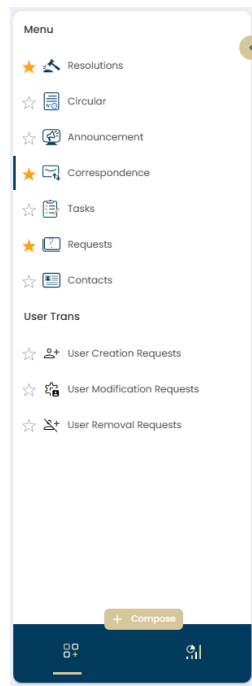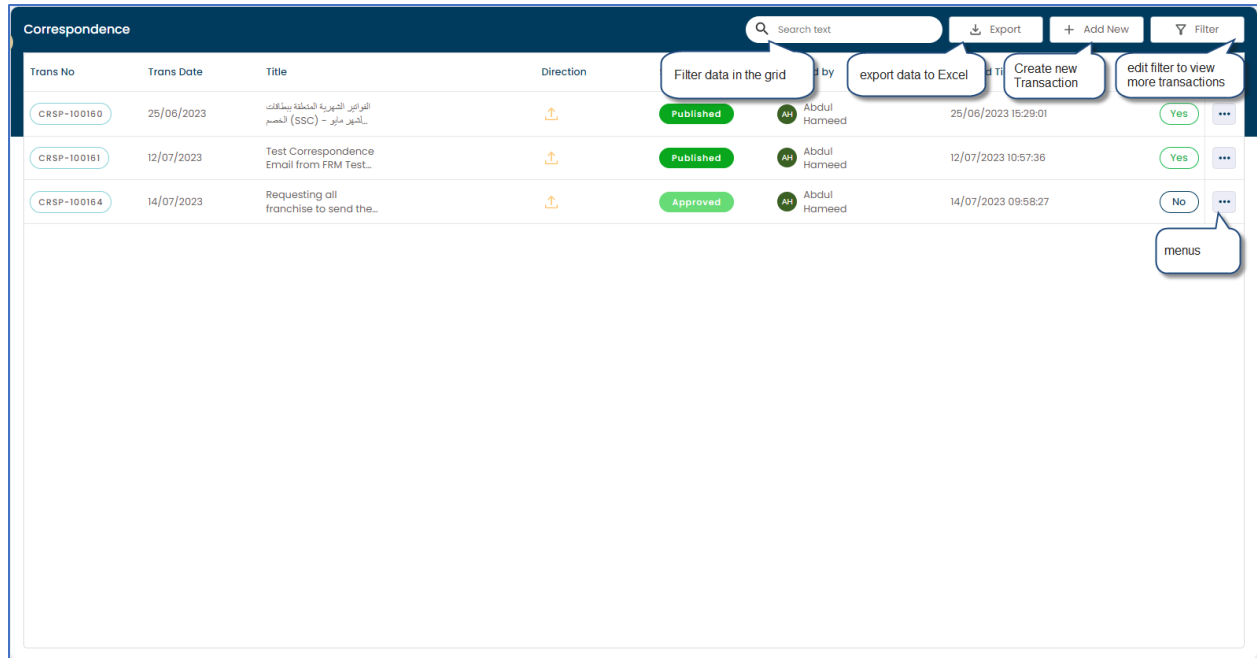
Once a service is selected system will load the service details with the past one-month transaction which is already created in that particular service.

Menu Full View functionality
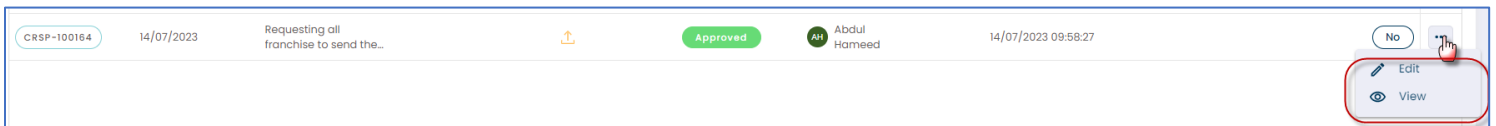
Below mentioned is the functionality in the full view window. User will see the menu based on the user access rights.

To take any action on an existing transaction click on the menu icon on the row as shown in the below image. This will list the menu based on the user access. Click on the intended menu to open the transaction.

New Transaction window Functionality

To create a new transaction, click on the new menu as shown in the below image

Correspondence	Search text	⬇ Export	+ Add New	▽ Filter
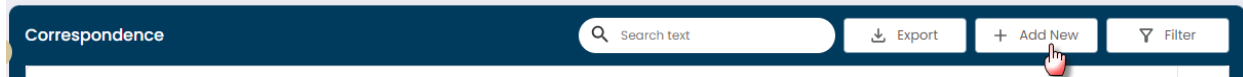
This will open the form in a popup. As shown in the below image
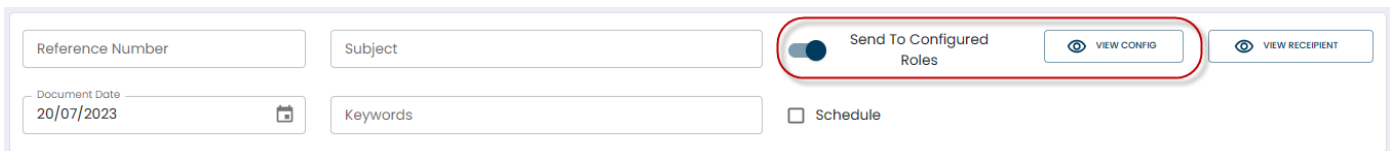
In the Header section is a language switcher, this defines the editor language. Based on this system will decide the mail template language format and the template text direction.
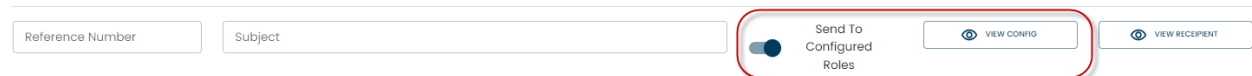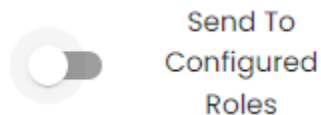

Header Section Functionality

Here in this section the user is defining to whom the transaction in intended to.

For each service type there is a configuration to whom the mail has to be delivered such as the mail group this can be viewed when clicking view config button.

To remove the default mail group of the service, turn the "Send to Configured Roles" disabled.

To schedule the delivery of mail after publish after a specific time, click on schedule checkbox which will enable the schedule date picker

Text Editor Functionality

FRM uses HTML / rich text editor tool that allows users to create and edit text with formatting and styling, similar to what is found in a word processor. Since editors are used extensively in all transaction in FRM, functionality available in the editor are crucial for FRM usage and simplicity

Here are some of the features that exists in FRM HTML editor.

Formatting options: This feature allows users to apply formatting to text such as bold, italic, underline, font size, and color.

Styling options: This feature allows users to apply styling to text such as alignment, indentation, and line spacing.
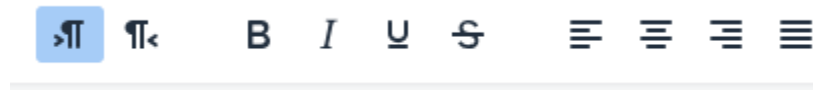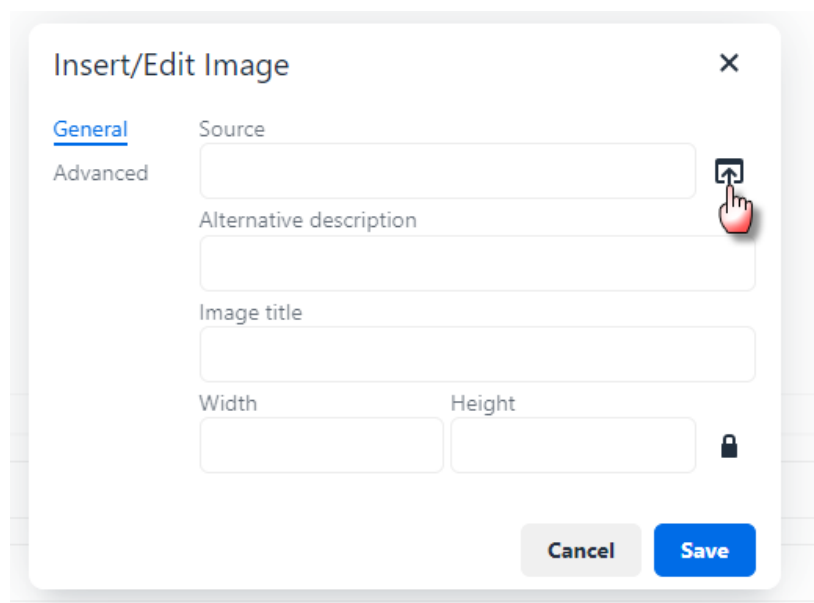
Copy and paste: This feature allows users to copy text from other sources such as web pages or documents and paste it into the editor.
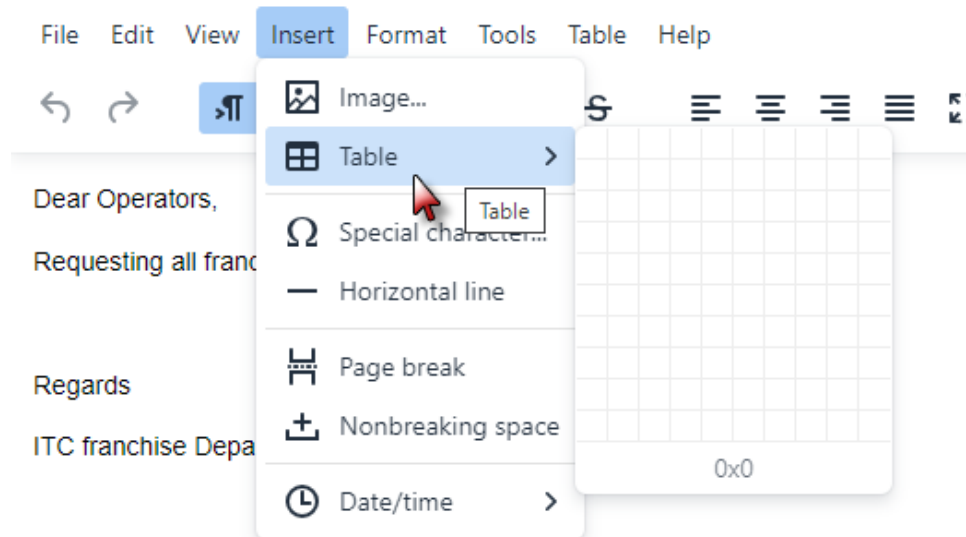
Undo and redo: This feature allow users to undo or redo their previous actions, such as typing or formatting changes.

Insert media: This feature allows users to insert media such as images, videos, and audio files into their text.

Tables: This feature allows users to create tables and add or remove rows and columns.

Spell check: This feature checks the spelling of the text and suggests corrections.

Maximize Editor : To maximize the view of the editor, click on the maximize button as shown in the image.
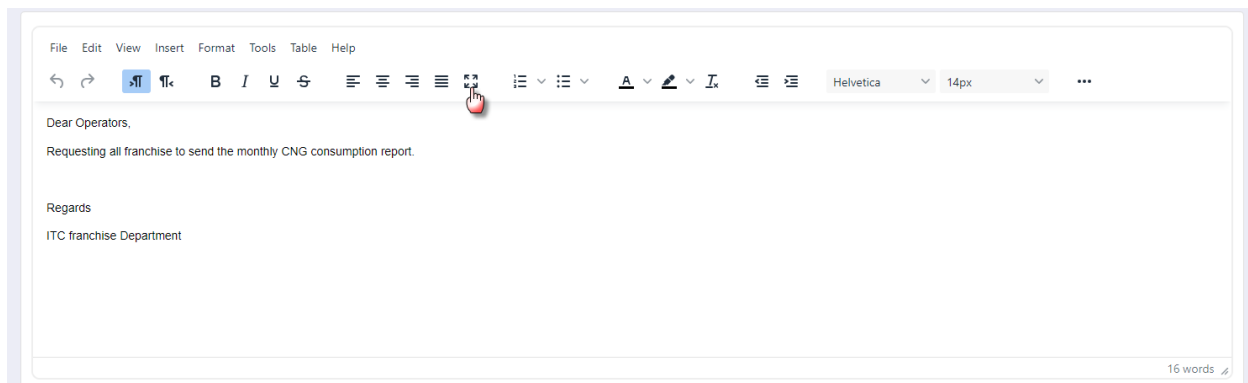
Minimize editor: Click on the maximize icon once more to minimize to previous state

Attachments

To insert attachments users can browse image or drag and drop to the image box.

Attachments

Eid Image.Jpg
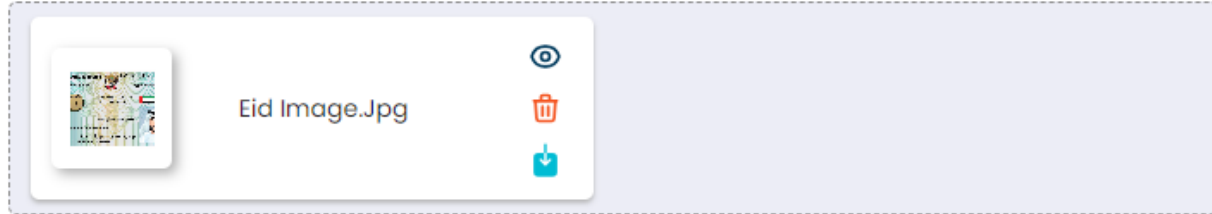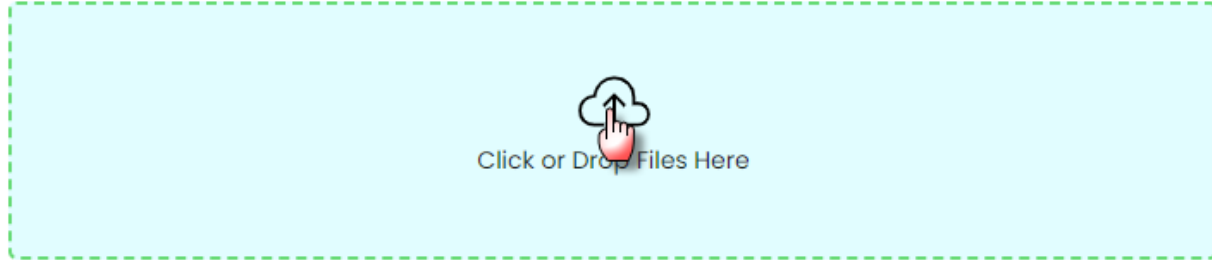
Save Button functionality

Here the user will be shown the actions that they can take on the service

Save As Draft	This will save the transaction in draft mode
Save & Send Test mail	This will save the mail and send a test mail to the creator; this can be used to verify how the mail will be delivered to end user.
Submit to Approver	This will save the transaction and submit for approval, the user who has access for approval will see this transaction in the action queue
Submit to ITC	This will save the transaction and approve the transaction at the same time.

User Management

Here the user can create user, edit user access right and block FRM access. User with eligible access rights will have the functionality to create and submit request to ITC.

Create User Request

Here the FRM user with rights to create user can create a new user request by clicking "Add New" Button

System will open the user form as shown in the below image

Enter the required data and attach emirates id document and profile photo.

Click on Submit to request to ITC for user creation approval.

User Modification Request

Click "Add New" to create a new request. System will open the user modification form as shown in the below image.

Click on the user drop down and select the user that need to be edited.

Update modification and click on submit to submit the request to ITC.

User Removal Request

Click "Add New" to create a new request. System will open the user removal form as shown in the below image.

Click on the user drop down and select the user that need to be removed.

Select the user and click on submit to submit the request to ITC.

مركز النقل المتكامل
INTEGRATED TRANSPORT CENTRE

Task Process
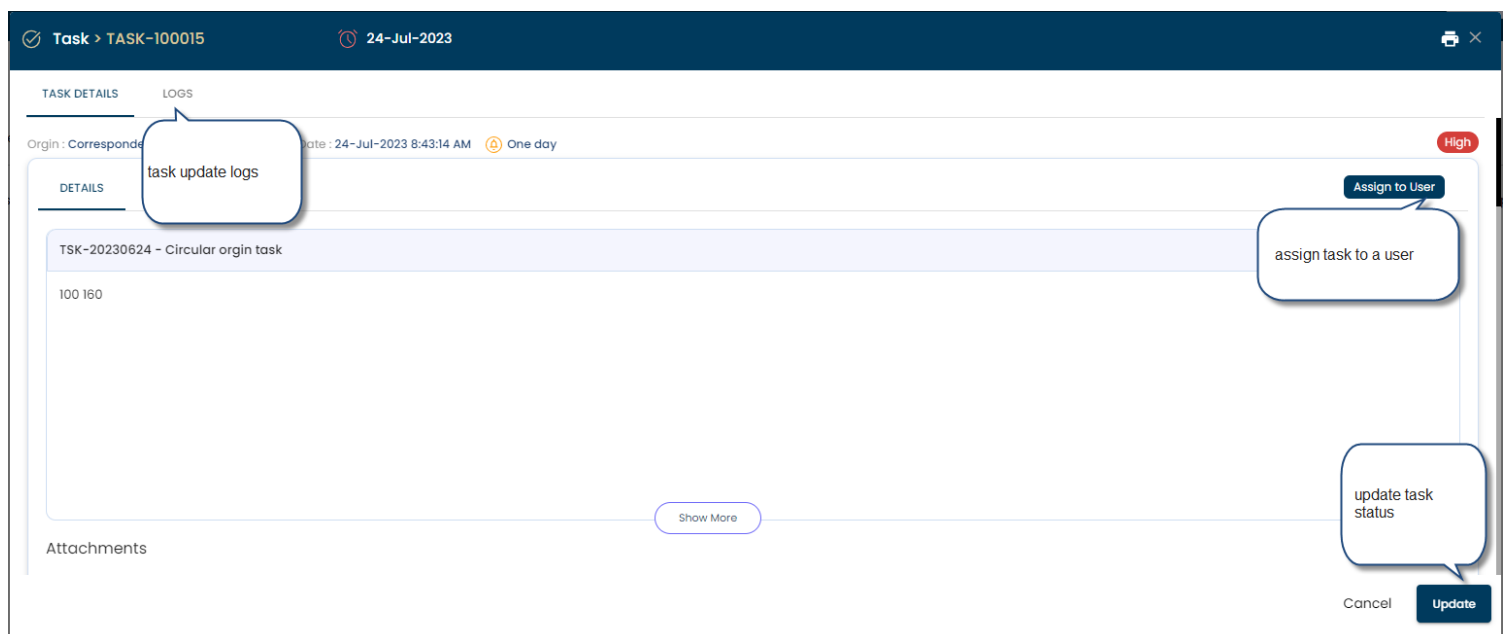
Task that are assigned to the user will be shown in the action queue of the user. user can click on the task and take necessary action.
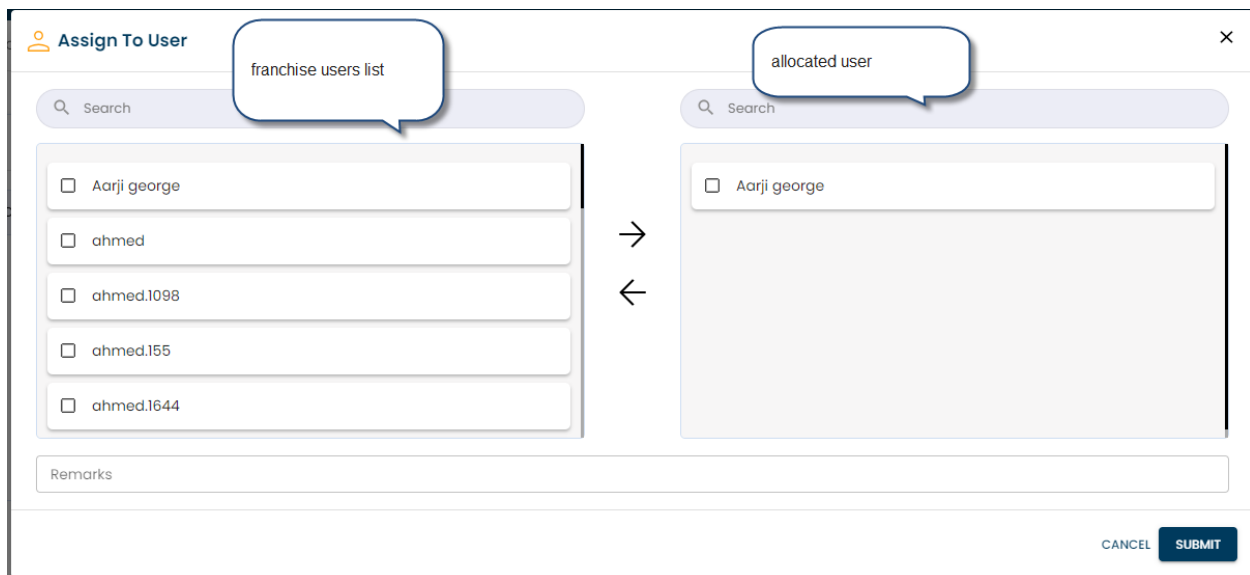
On clicking system the open the task view with the relevant user access to update task.

Assign Task

To update the task allocation click on assign user and move the user to allocated section and submit.

Update task status

Here the user can update the task status.

Click on Update system will show the status update window as shown in the below image.

Enter the relevant task details and click save to update the task status.

Enter data

Once update the details of the updated task will be shown in the task log section

Once the task is confirmed system will push the task status to ITC for ITC confirmation.