

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 .....	3
User Login.....	4
Login Page: .....	6
Home Page Components.....	7
Components of FRM .....	7
Transactions .....	9
Menu Full View functionality.....	11
New Transaction window Functionality .....	12
Text Editor Functionality .....	13
User Management.....	18
Create User Request.....	18
User Modification Request.....	20
User Removal Request.....	21
Task Process .....	22

## 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:***

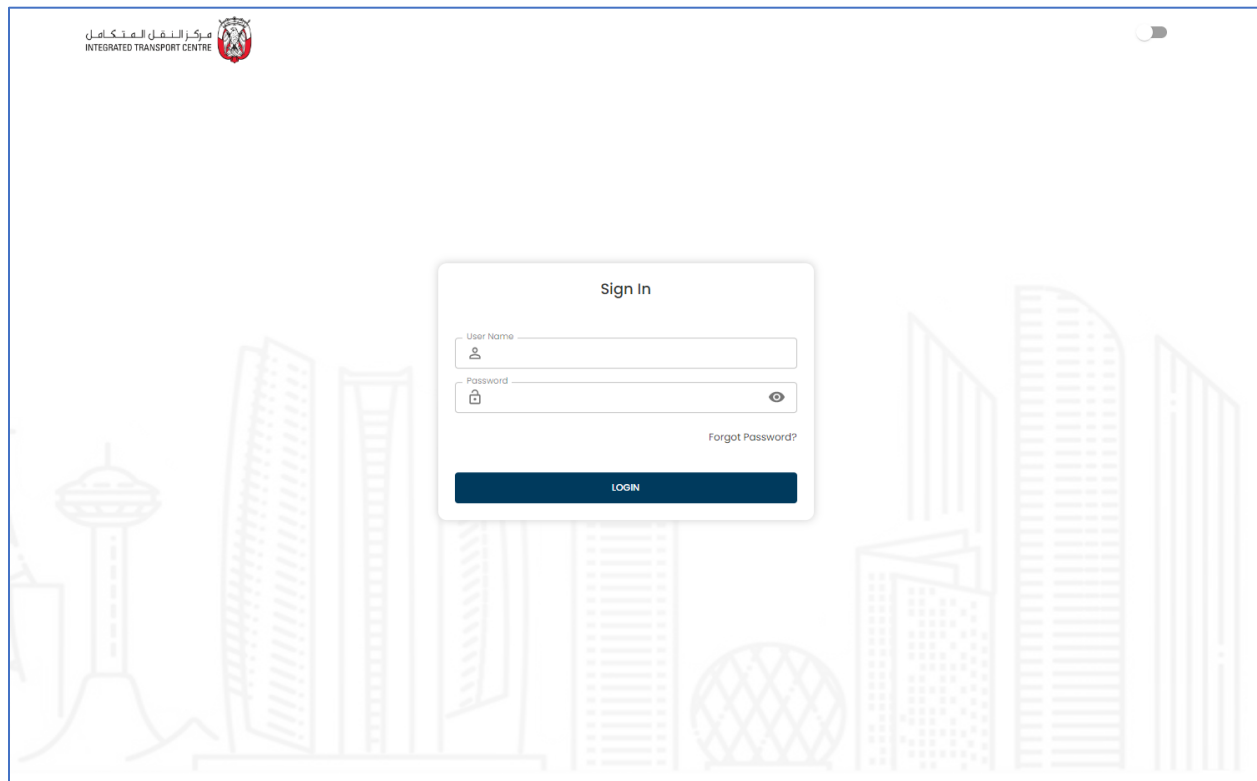
1. Transaction Related Module
  - a. User management
  - b. Correspondence
  - c. Request
  - d. Task
  - e. Contact management

### ***User Roles:***

1. Operator User

## User Login

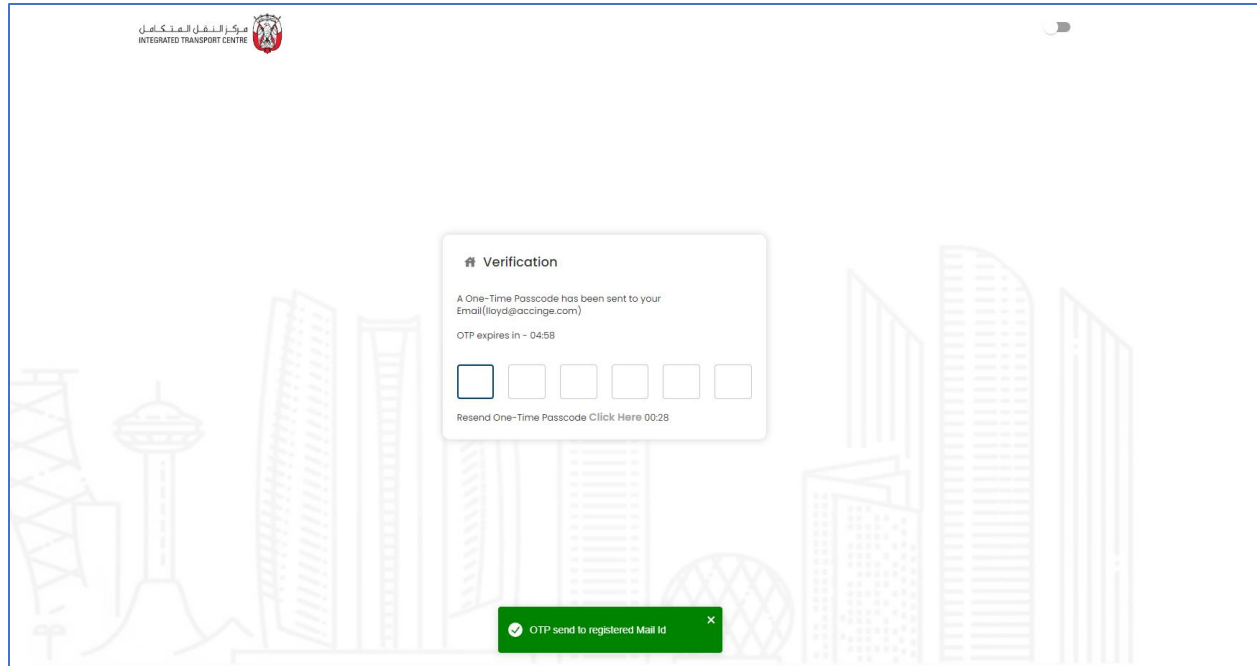
Operator user can login to FRM system using a predefined user name and password. Operator User will be having functionality to reset password if the user is created without any source system integration.



*Login page*

### Steps:

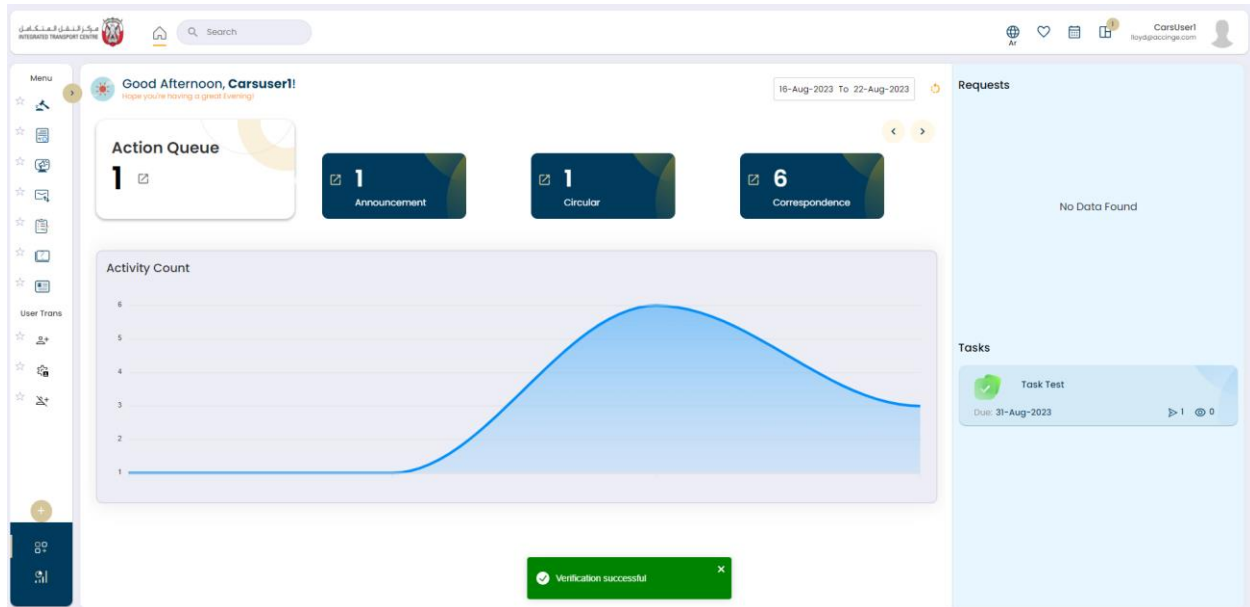
1. Enter the Login username and password
2. Click “Login”, system will validate the user access in FRM system, if the user is created with integration with a source system, then the password validation will be done from source system, and verify the user rights in FRM system. Once this validation is 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.



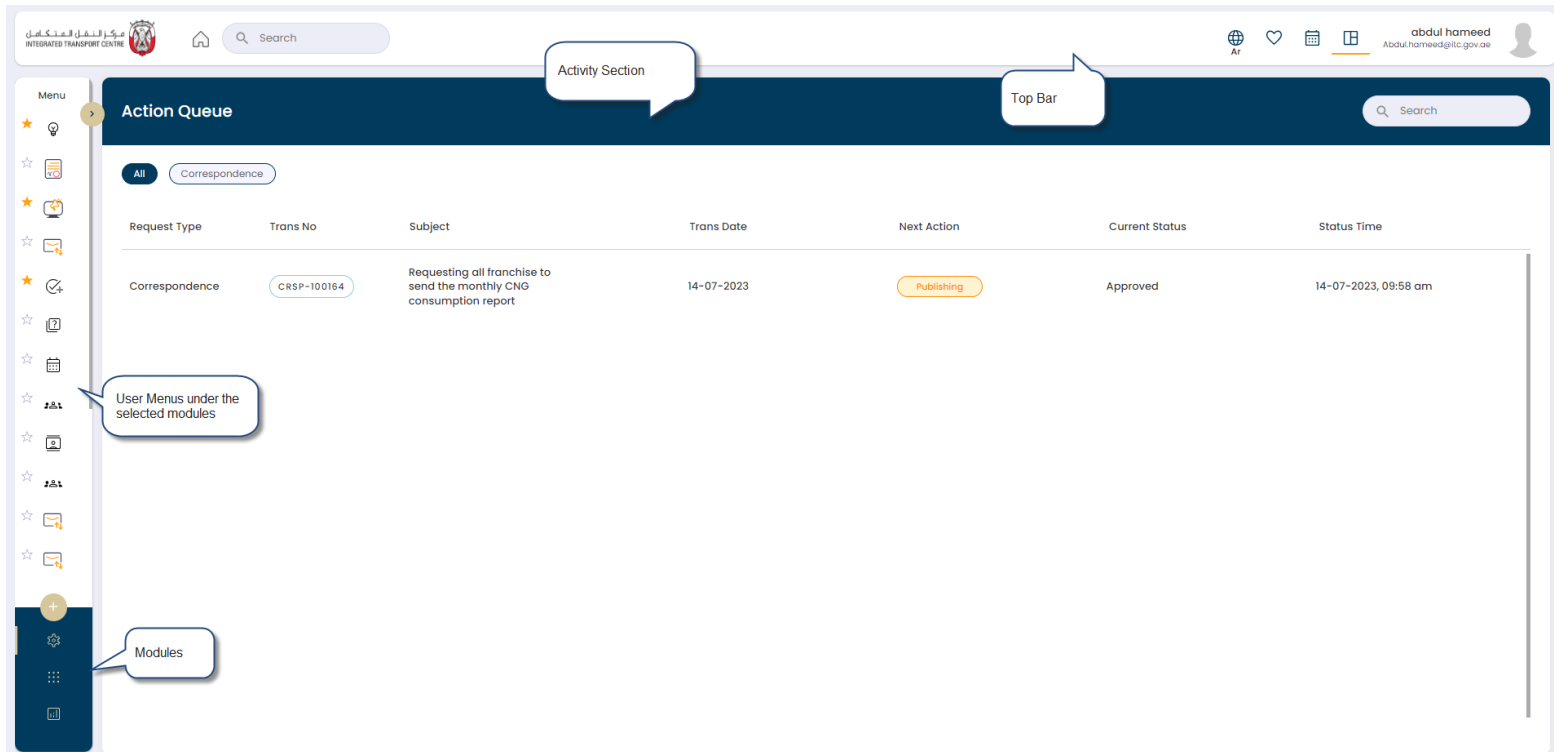
User related data will be shown here in this page.

## 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.





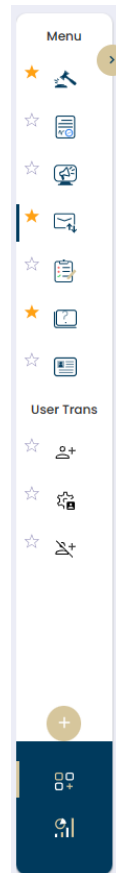
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### *Details of each icon*

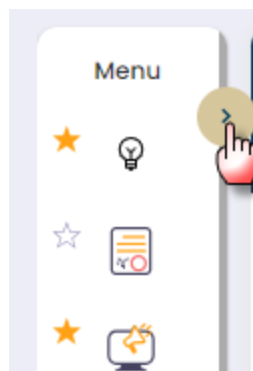
	Language switcher from Arabic to English and English to Arabic
	Favorite marked menus
	Calendar to display events
	User pending action (My action Queue)
	User image update link and logout
	Home Page navigation

## Transactions

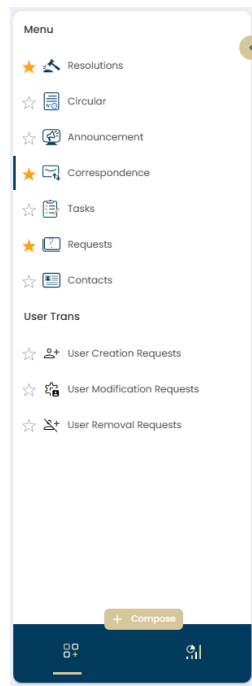
To navigate to transaction, select the transaction module, this will list the transactions that the user has access to, in the FRM Module.



To view the details of the menu, click on menu expand icon to show the menu details.



## Expanded Menu View

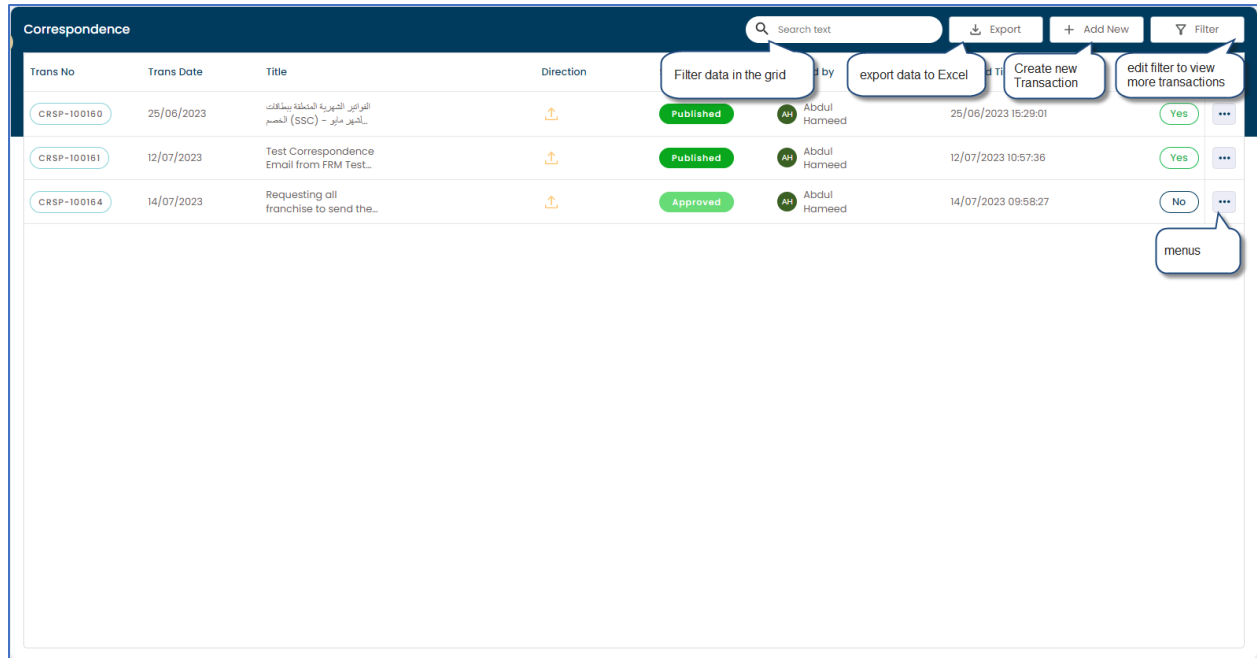


Once a service is selected system will load the service details with the past one-month transaction which is already created in that particular service.

Menu	Correspondence						
	Trans No	Trans Date	Title	Direction	Status	Created by	Created Time
★ Resolutions	CRSP-100160	25/06/2023	الخير مايو - 2023 (SSC) الفواتير الشهرية المتعلقة بمنتجات الحسم	↑	Published	AH abdul hameed	25/06/2023 15:29:0
☆ Circular	CRSP-100161	12/07/2023	Test Correspondence Email from FRM Test server	↑	Published	AH abdul hameed	12/07/2023 10:57:36
☆ Announcement	CRSP-100164	14/07/2023	Requesting all franchise to send the monthly CNG consumption re...	↑	Published	AH abdul hameed	14/07/2023 09:58:2
★ Correspondence	CRSP-100165	18/07/2023	Task for Cars franchise	↑	Published	AH abdul hameed	18/07/2023 12:37:01
☆ Tasks	CRSP-100166	18/07/2023	Test correspondence mail link test	↑	Published	AH abdul hameed	18/07/2023 14:18:11
★ Requests	INCRSP-100005	20/07/2023	Test Correspondence	↓	Submitted to ITC	C CarsUser1	20/07/2023 08:47:31
☆ Contacts	CRSP-100168	20/07/2023	This is a contact update auto task	↑	Published	HB hasanul banna	20/07/2023 09:19:5
User Trans	INCRSP-100006	20/07/2023	Test Connect for demo -	↓	Submitted to ITC	C CarsUser1	20/07/2023 11:21:11
☆ User Creation Requests							
☆ User Modification Requests							
☆ User Removal Requests							

## Menu Full View functionality

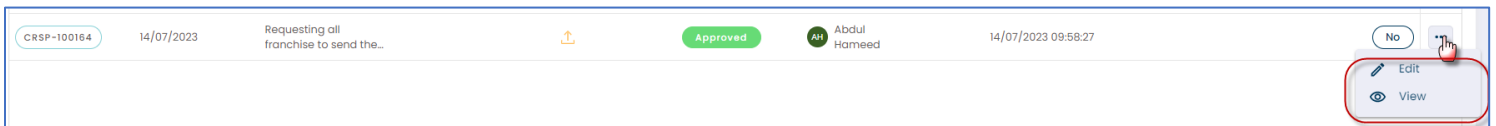
Below mentioned is the functionality in the full view window. User will see the menu based on the user access rights.



The screenshot shows a table titled "Correspondence" with columns: Trans No, Trans Date, Title, Direction, Status, User, and Date. Callouts point to various actions: "Filter data in the grid" (on the grid), "export data to Excel" (on the Export button), "Create new Transaction" (on the Add New button), "edit filter to view more transactions" (on the Filter button), and "menus" (on the menu icon in the row actions).

Trans No	Trans Date	Title	Direction	Status	User	Date	Actions
CRSP-100160	25/06/2023	الواتر الشهيرة المعلقة ببنك... ...الشمس (SSC) -	↑	Published	Abdul Hameed	25/06/2023 15:29:01	Yes, ...
CRSP-100161	12/07/2023	Test Correspondence Email from FRM Test...	↑	Published	Abdul Hameed	12/07/2023 10:57:36	Yes, ...
CRSP-100164	14/07/2023	Requesting all franchise to send the...	↑	Approved	Abdul Hameed	14/07/2023 09:58:27	No, ...

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.

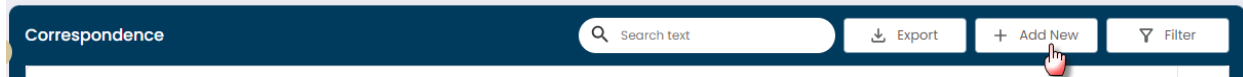


The close-up shows the menu icon (three dots) in the row actions. A red box highlights the menu, and a red circle highlights the "Edit" and "View" options.

Trans No	Trans Date	Title	Direction	Status	User	Date	Actions
CRSP-100164	14/07/2023	Requesting all franchise to send the...	↑	Approved	Abdul Hameed	14/07/2023 09:58:27	No, Edit, View

## New Transaction window Functionality

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



This will open the form in a popup. As shown in the below image

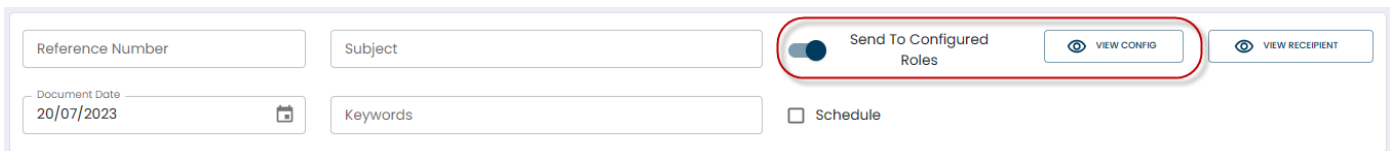
A screenshot of a transaction form popup. The form has a light blue border and a white background. At the top, there are input fields for 'Reference Number' and 'Subject', a 'Document Date' field with a calendar icon showing '14/07/2023', and a 'Keywords' field. To the right of these fields are a 'Send To Configured Roles' toggle switch, a 'Schedule' checkbox, and two buttons: 'VIEW CONFIG' and 'VIEW RECEIPT'. Below the input fields is a large text area with a rich text editor toolbar. The toolbar includes options for font color, background color, text color, bold, italic, underline, link, unlink, list, and indent. Below the text area are four dropdown menus: 'Recipients', 'Tags', and 'Related Items'. At the bottom of the form is an 'Attachments' section with a dashed green box containing a cloud icon and the text 'Click or Drop Files Here'. At the very bottom of the popup are five buttons: 'Close', 'Save As Draft', 'Save & Send Test Mail', 'Submit For Approval', and 'Save & Approve'.

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.

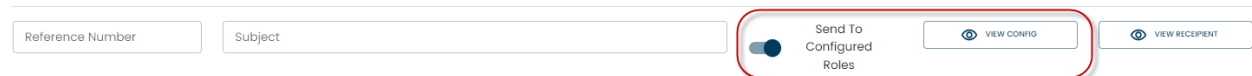


## Header Section Functionality

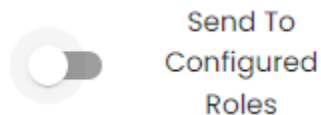
Here in this section the user is defining to whom the transaction is intended to.



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

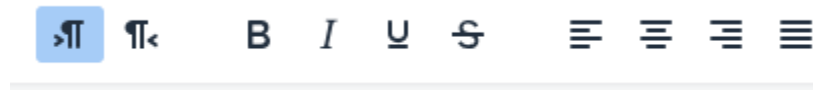
FRM uses HTML / rich text editor tool that allows users to create and edit text with formatting and styling, similar to what is found in a word processor. Since editors are used extensively in all transaction in FRM, functionality available in the editor are crucial for FRM usage and simplicity

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.

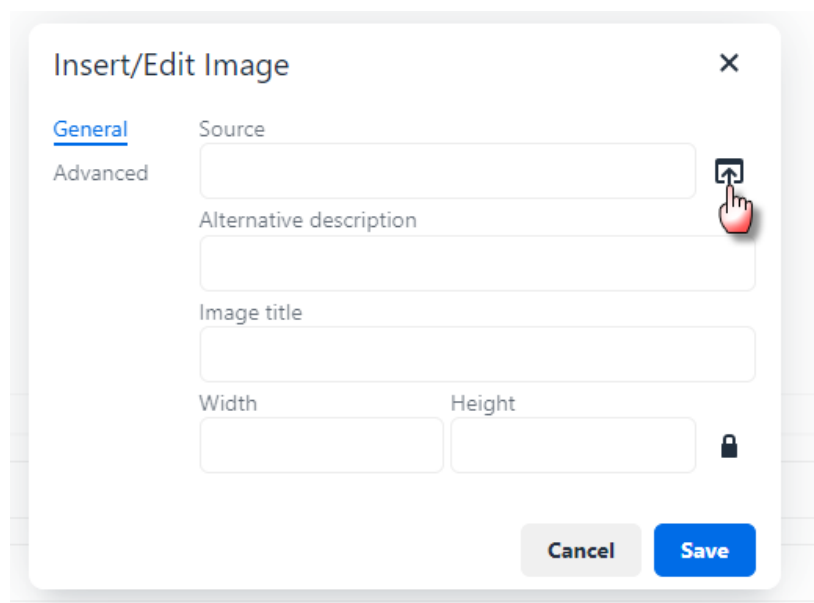


Copy and paste: This feature allows users to copy text from other sources such as web pages or documents and paste it into the editor.

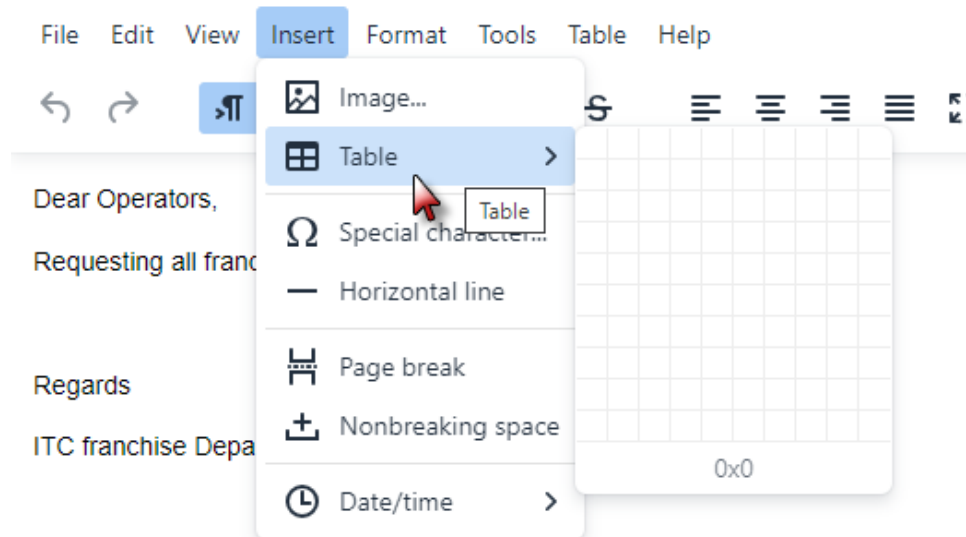
Undo and redo: This feature allow users to undo or redo their previous actions, such as typing or formatting changes.



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

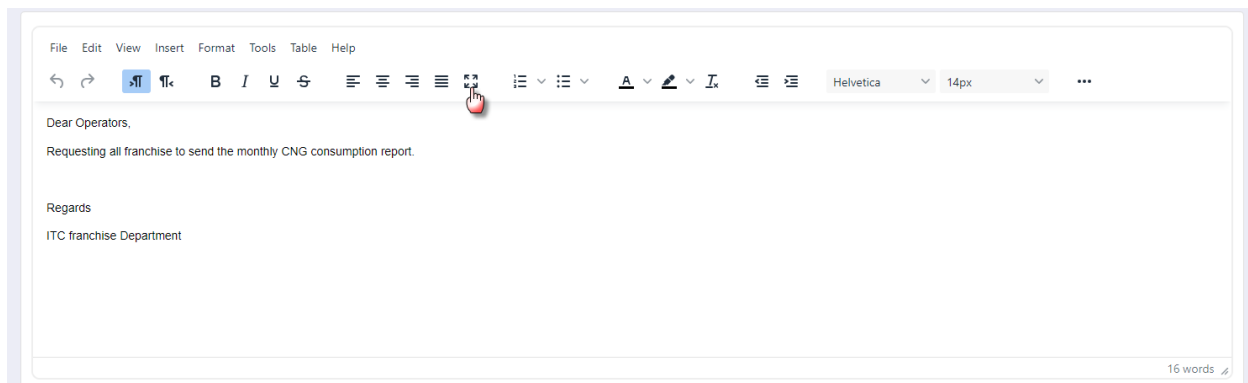
A dialog box titled "Insert/Edit Image" with a close button (X) in the top right. It has two tabs: "General" (selected) and "Advanced". Under "General", there are fields for "Source" (with an upload icon), "Alternative description", "Image title", "Width", and "Height" (with a lock icon). At the bottom are "Cancel" and "Save" buttons.

**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.



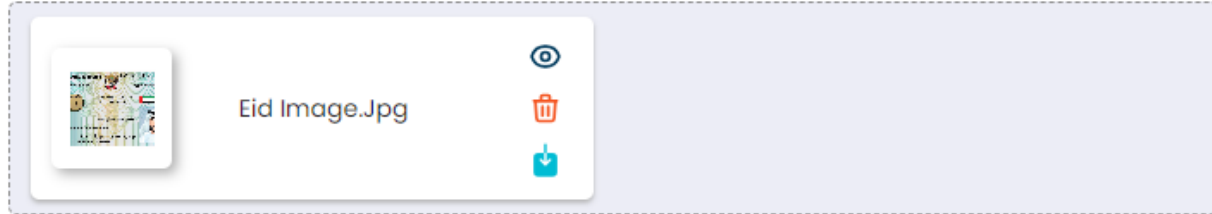
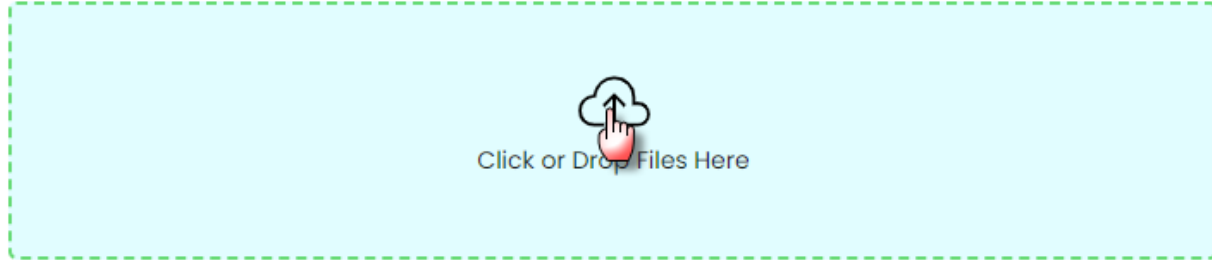
**Minimize editor:** Click on the maximize icon once more to minimize to previous state

## Attachments

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




## Attachments



## Save Button functionality

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

 CarsUser1 lloyd@accinge.com	<div> <span>Close</span> <span>Save As Draft</span> <span>Save &amp; Send Test Mail</span> <span>Submit To Approver</span> <span>Submitted To ITC</span> </div>
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

User Creation Requests									
<div> <div>Search text</div> <div>Export</div> <div>Add New</div> <div>Filter</div> </div>									
Submitted	Status	Status User	Closed	Trans No	Trans Date	Franchise	User Full Name Ar	User Full Name En	U
Yes	Approved	CarsUser1	Yes	1	26/06/2023	Cars	George Layed	George Layed	C ...
Yes	Approved	CarsUser1	Yes	2	17/07/2023	Cars	Ahmed A	Ahmed A	C ...
Yes	Approved	abdul hameed	Yes	3	18/07/2023	Cars	carsuser3	carsuser3	c ...
Yes	Approved	abdul hameed	Yes	4	18/07/2023	Cars	George.Arun	George.Arun	G ...
Yes	Approved	abdul hameed	Yes	USR-N-5	19/07/2023	Cars	carsuser4	carsuser4	c ...
Yes	Approved	abdul hameed	Yes	USR-N-6	20/07/2023	Cars	Jonathan	Jonathan	J ...
Yes	Approved	abdul hameed	Yes	USR-N-7	20/07/2023	Cars	Ahmed Ali	Ahmed Ali	a ...

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

**User Creation Requests - New -** 20-07-2023 Cars

Title:  User Full Name (Arabic):  User Full Name (English):

User Name:  Password:  Confirm Password:

Employee Position:  Mobile No.:  Office No.:

Email Id:  Status Remarks:

Emirates ID:

Emirates ID Number:  Expiry Date:

Emirates ID:

#	Roles	Select
1	Operator Readonly (All Modules)	<input type="checkbox"/>
2	Operator Request Creator	<input type="checkbox"/>
3	Operator Request Submitter	<input type="checkbox"/>
4	Operator Contact Manager	<input type="checkbox"/>
5	Operator User Manager	<input type="checkbox"/>
6	Operator Task Handler	<input type="checkbox"/>
7	Operator Task Approver	<input type="checkbox"/>
8	Operator Correspondence Creator	<input type="checkbox"/>
9	Operator Correspondence Approver	<input type="checkbox"/>

Cancel Submit

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

**User Creation Requests - New -** 20-07-2023 Cars

Title:  User Full Name (Arabic):  User Full Name (English):

User Name:  Password:  Confirm Password:

Employee Position:  Mobile No.:  Office No.:

Email Id:  Status Remarks:

Emirates ID:

Emirates ID Number:  Expiry Date:

Emirates ID:

#	Roles	Select
1	Operator Readonly (All Modules)	<input checked="" type="checkbox"/>
2	Operator Request Creator	<input checked="" type="checkbox"/>
3	Operator Request Submitter	<input type="checkbox"/>
4	Operator Contact Manager	<input type="checkbox"/>
5	Operator User Manager	<input type="checkbox"/>
6	Operator Task Handler	<input type="checkbox"/>
7	Operator Task Approver	<input type="checkbox"/>
8	Operator Correspondence Creator	<input type="checkbox"/>
9	Operator Correspondence Approver	<input type="checkbox"/>

Cancel Submit

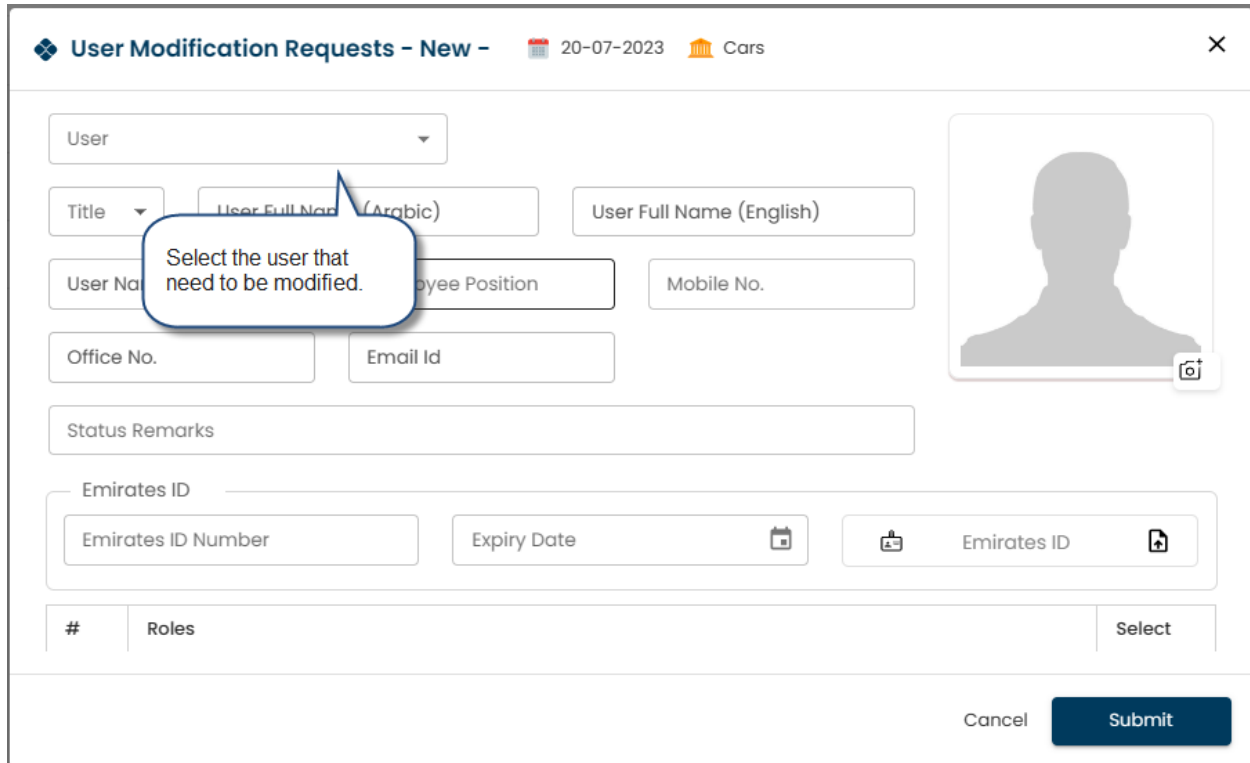
Enter User Information

select required FRM access

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.



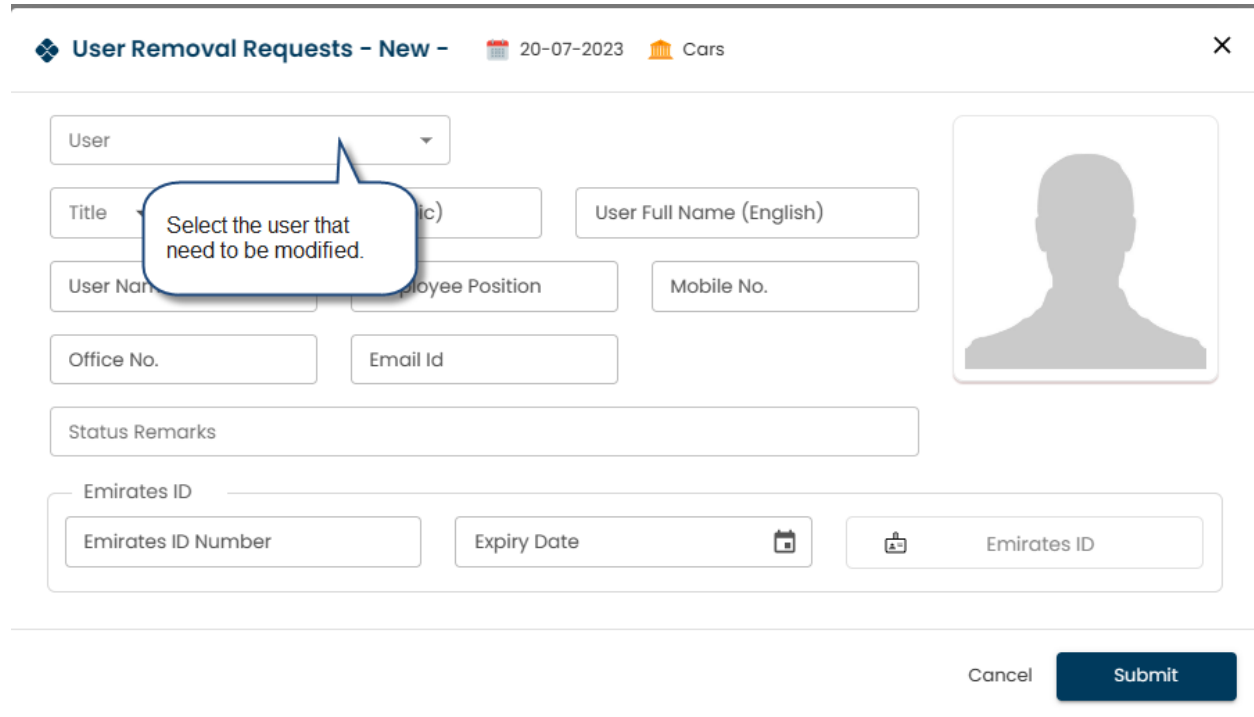
The screenshot shows a web form titled "User Modification Requests - New". At the top, there is a header bar with a date "20-07-2023" and a category "Cars". The form contains several input fields: "User" (a dropdown menu), "Title", "User Full Name (Arabic)", "User Full Name (English)", "User No.", "Employee Position", "Mobile No.", "Office No.", "Email Id", "Status Remarks", "Emirates ID", "Emirates ID Number", "Expiry Date", and "Emirates ID" (with a download icon). A callout bubble points to the "User" dropdown with the text "Select the user that need to be modified." To the right of the form is a placeholder for a user profile picture. At the bottom, there is a table with columns "#", "Roles", and "Select". Below the table are "Cancel" and "Submit" buttons.

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.



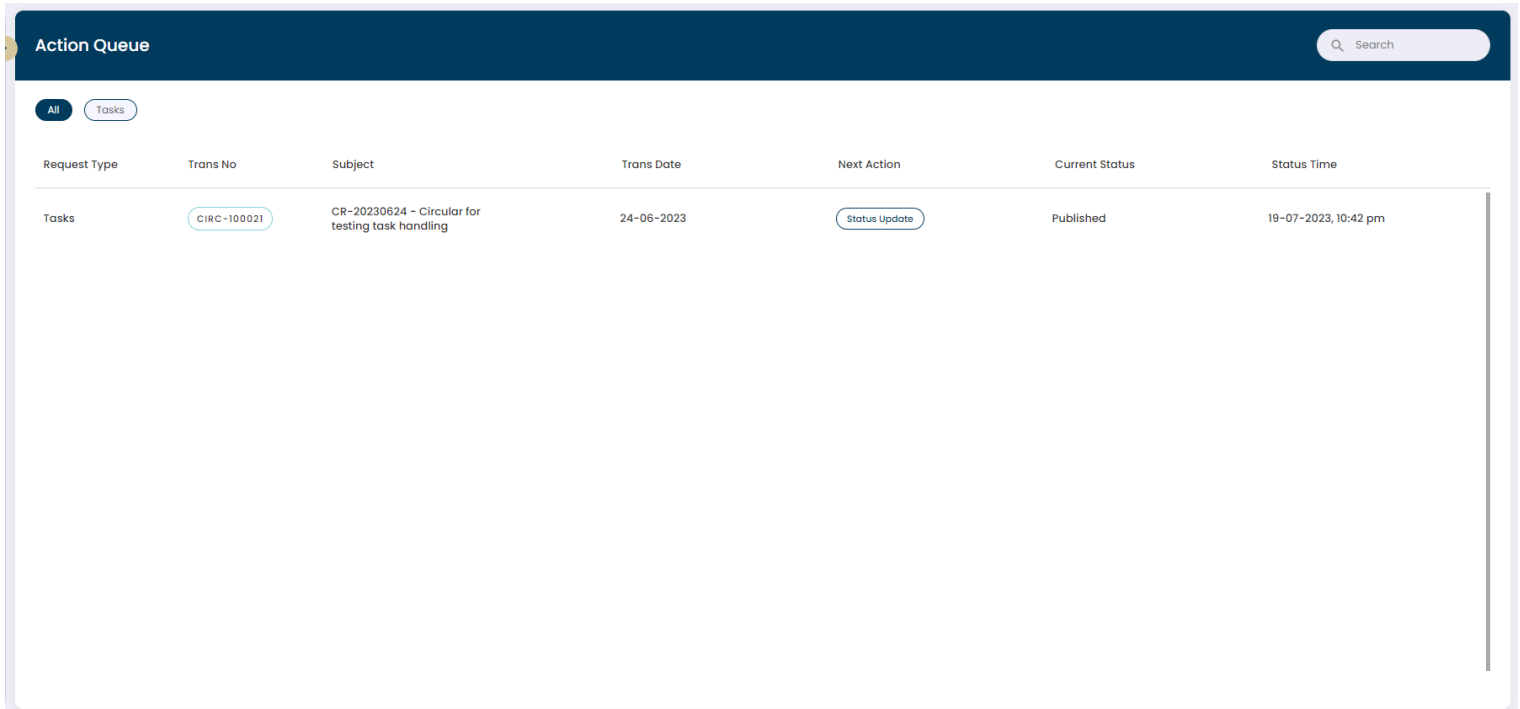
The screenshot shows the 'User Removal Requests - New' form. At the top, there is a header bar with a blue diamond icon, the title 'User Removal Requests - New', a calendar icon showing '20-07-2023', a building icon labeled 'Cars', and a close button 'X'. The form contains several input fields: 'User' (a dropdown menu with a callout bubble saying 'Select the user that need to be modified.'), 'Title', 'User Full Name (English)', 'User Name', 'Employee Position', 'Mobile No.', 'Office No.', 'Email Id', 'Status Remarks', 'Emirates ID' (a section containing 'Emirates ID Number', 'Expiry Date' with a calendar icon, and 'Emirates ID' with an ID card icon). At the bottom right, there are 'Cancel' and 'Submit' buttons.

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.

## Task Process

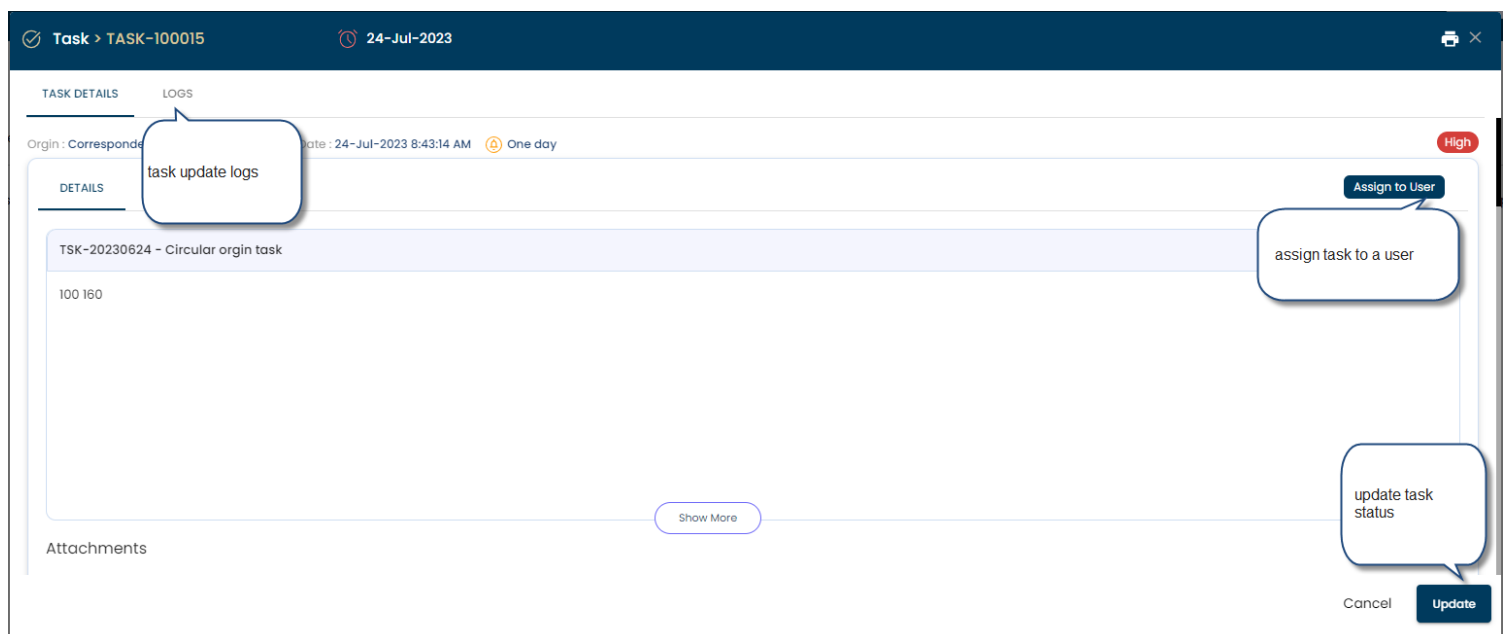
Task that are assigned to the user will be shown in the action queue of the user. user can click on the task and take necessary action.



The screenshot shows the 'Action Queue' interface. At the top, there is a search bar and tabs for 'All' and 'Tasks'. Below the tabs is a table with the following columns: Request Type, Trans No, Subject, Trans Date, Next Action, Current Status, and Status Time. A single task is listed with the following details:

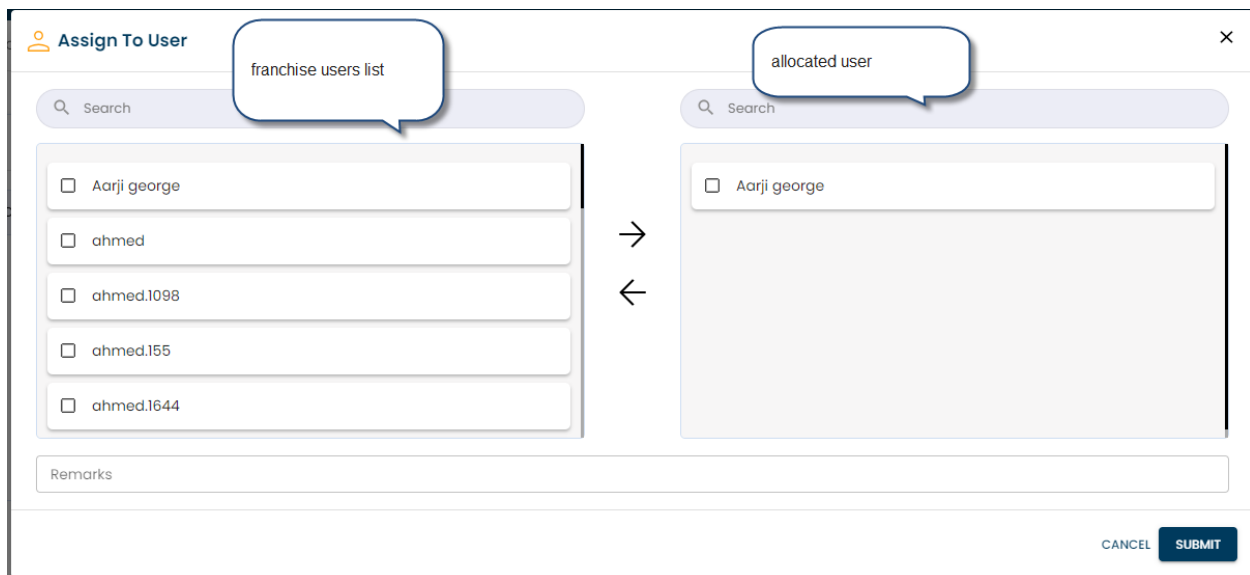
Request Type	Trans No	Subject	Trans Date	Next Action	Current Status	Status Time
Tasks	CIRC-100021	CR-20230624 - Circular for testing task handling	24-06-2023	Status Update	Published	19-07-2023, 10:42 pm

On clicking system the open the task view with the relevant user access to update task.



The screenshot shows the 'Task View' interface for 'TASK-100015' dated '24-Jul-2023'. The interface has tabs for 'TASK DETAILS' and 'LOGS'. The 'TASK DETAILS' tab is active, showing the task origin as 'Correspondence', the date as '24-Jul-2023 8:43:14 AM', and a priority of 'High'. The task title is 'TSK-20230624 - Circular origin task'. There is a 'Show More' button at the bottom. On the right side, there is an 'Assign to User' button and an 'Update' button. A 'task update logs' callout points to the 'LOGS' tab. An 'assign task to a user' callout points to the 'Assign to User' button. An 'update task status' callout points to the 'Update' button.

## Assign Task



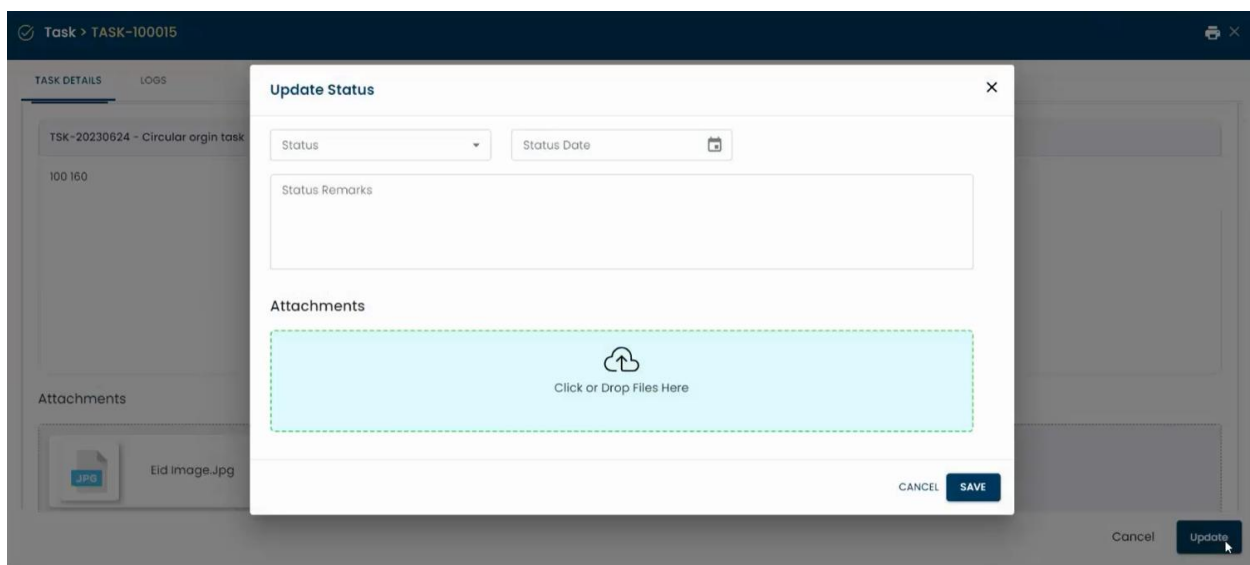
The 'Assign Task' dialog box is titled 'Assign To User' and features a close button (X) in the top right corner. It is divided into two main sections: 'franchise users list' on the left and 'allocated user' on the right. Both sections have a search bar. The 'franchise users list' contains a list of users with checkboxes: Aarji george, ahmed, ahmed.1098, ahmed.155, and ahmed.1644. The 'allocated user' section currently shows 'Aarji george'. Between the two sections are right and left arrow buttons. At the bottom, there is a 'Remarks' text field and two buttons: 'CANCEL' and 'SUBMIT'.

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.



The 'Update Status' dialog box is shown over a background of the 'Task' details page for 'TASK-100015'. The dialog has a title bar with a close button (X). It contains a 'Status' dropdown menu, a 'Status Date' field with a calendar icon, and a 'Status Remarks' text area. Below these is an 'Attachments' section with a dashed box and a cloud icon, with the text 'Click or Drop Files Here'. At the bottom right of the dialog are 'CANCEL' and 'SAVE' buttons. In the background, the 'Task' page shows 'TASK DETAILS' and 'LOGS' tabs, with 'TASK-20230624 - Circular origin task' selected. It also shows an 'Attachments' section with a file named 'Eid image.jpg'.



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

The 'Update Status' form is displayed. It includes a 'Status' dropdown menu, a 'Status Date' field with a calendar icon, and an 'Attachments' section with a dashed box and a cloud icon. The 'Status' dropdown is currently empty. The 'Status Date' field is empty. The 'Attachments' section is empty. At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

Enter data

The 'Update Status' form is displayed with data entered. The 'Status' dropdown is set to 'In Process'. The 'Progress %' field shows '56'. The 'Status Date' field shows '07/20/2023'. The 'Status Remarks' field is empty. The 'Attachments' section shows a dashed box with a cloud icon and the text 'Click or Drop Files Here'. Below the dashed box, there is a file attachment card with a thumbnail image, the file name '361269740\_670685633\_9366277\_3936605020...', and icons for viewing and deleting the file. At the bottom right, there are 'CANCEL' and 'SAVE' buttons, with a hand cursor pointing at the 'SAVE' button.

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

Task > TASK-100015

TASK DETAILS

LOGS

19-Aug-2023 10:42:49 PM

Remarks  
13

Name: ahmed      Status: In Process      Completion: 15%

Remarks  
Sample 102

JPG

Sample 102.jpg

20-Aug-2023 3:03:24 PM

Name: ahmed      Status: In Process      Completion: 56%

Remarks  
Save Remarks

JPG

361269740\_6706  
856230366777

Cancel

Update

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