

2023

FRM User Manual

USER MANUAL DOCUMENT
ITC USER

DSTME | Dubai

Document Revision History

SL No	Name	Date	Reason for Changes	Version
1	Lloyd George	02-Jul-2023	Document Created	Version 1.0.1
2	Sijo Jose	10-Jul-2023	Document Verified	Version 1.0.1

Contents

Document Overview	3
User Login	4
Login Page:	5
Home Page Components	6
Components of FRM	6
Transactions	8
Menu Full View functionality.....	10
New Transaction window Functionality.....	11
Text Editor Functionality	13

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:

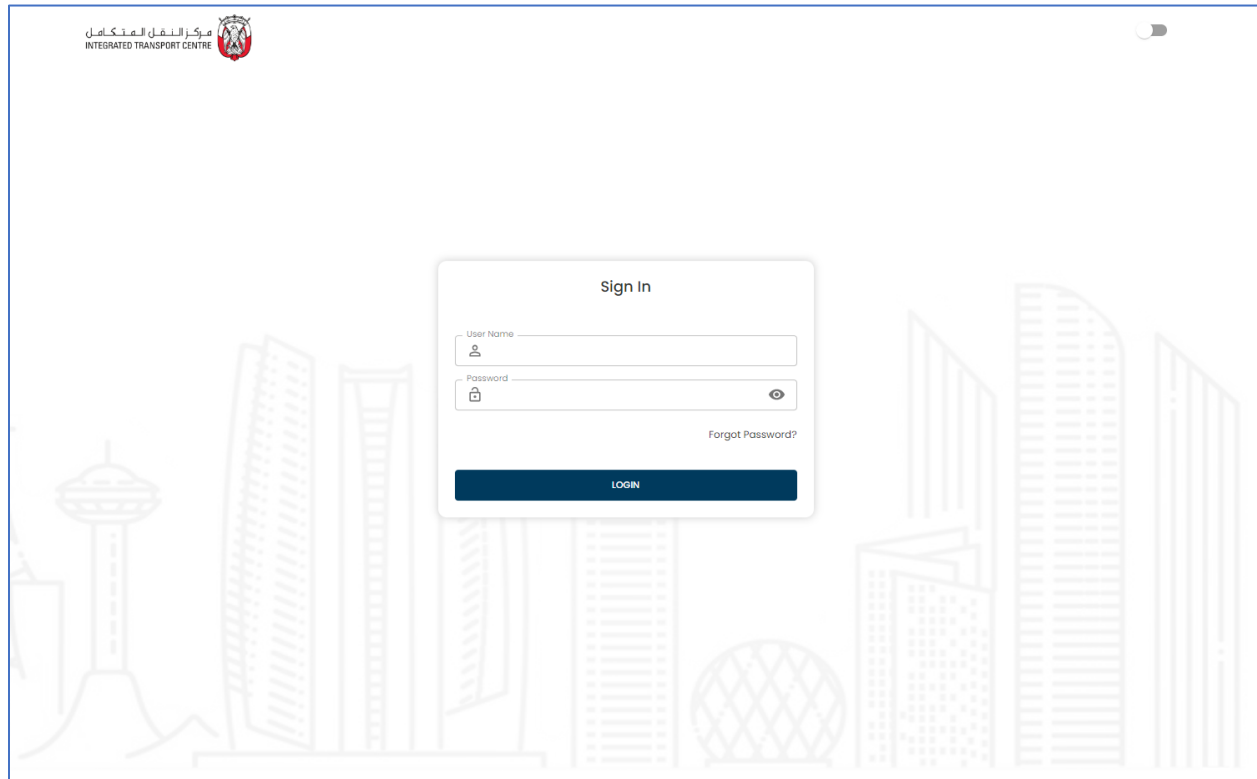
1. Transaction Related Module

User Roles:

1. ITC User

User Login

FRM is designed to integrate the user login with the Active directory, to ease the login mechanism and authentication policy. Hence for the reason there is no functionality for the ITC user to change password or the retrieve password, whereas the franchise user will be having much more functionality to create password, retrieve password and reset password if the user is created without any source system integration.



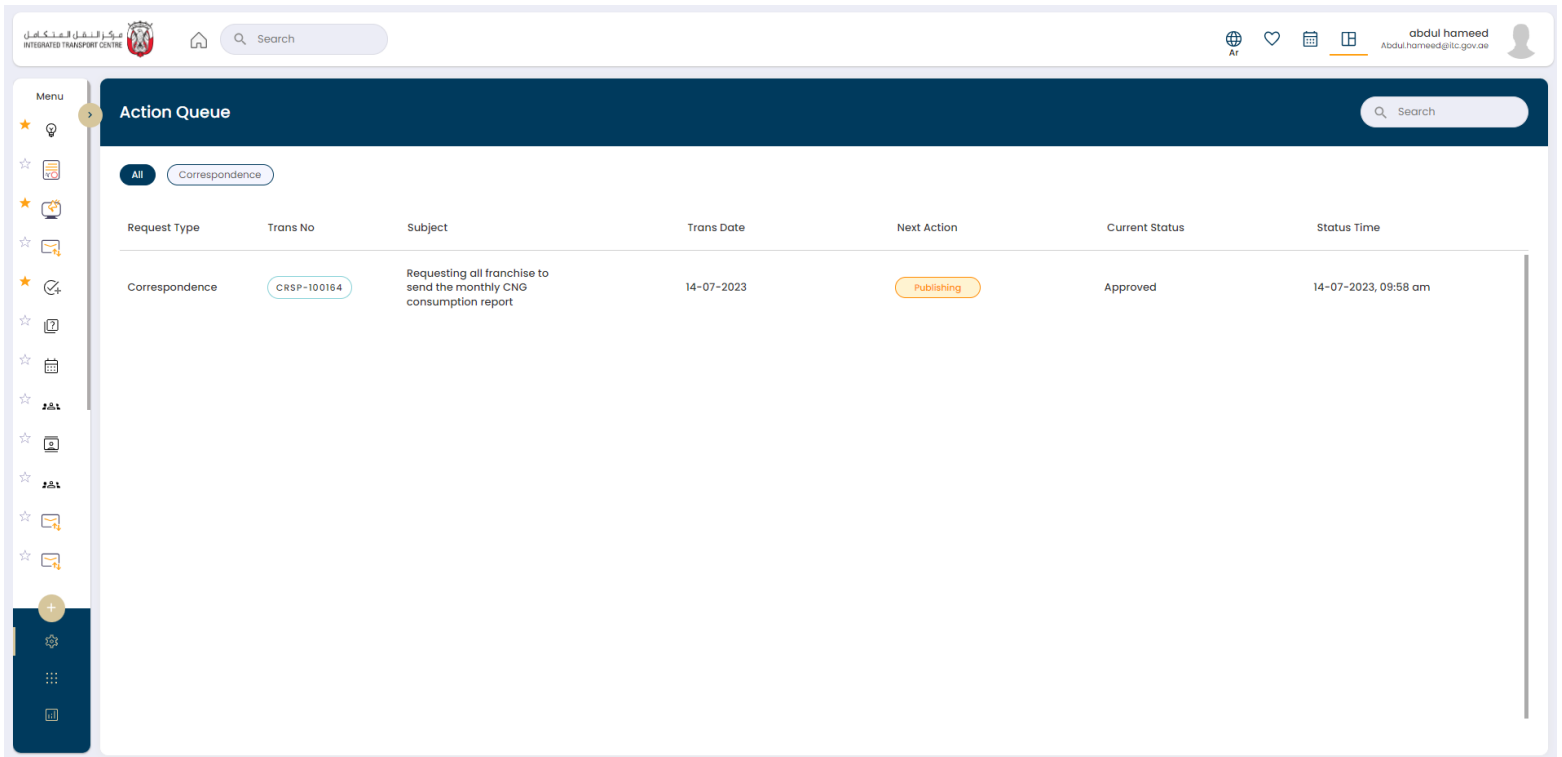
Login page

Steps:

1. Enter the Login username and password, which is the domain user name and password (in simple terms Computer login user name and password)
2. Click Login system will validate the user access in Active Directory and verify the user rights in FRM system. Once this validation is completed system will navigate the user to Login page.

Login Page:

Once the user successfully login system will navigate to the login home page, for the time being system is configured to navigate to user pending task page.



The screenshot displays the 'Action Queue' section of the FRM System. The page features a dark blue header with the title 'Action Queue' and a search bar. Below the header, there are tabs for 'All' and 'Correspondence'. The main content area is a table with the following columns: Request Type, Trans No, Subject, Trans Date, Next Action, Current Status, and Status Time. A single row is visible under the 'Correspondence' tab, showing a request for a monthly CNG consumption report.

Request Type	Trans No	Subject	Trans Date	Next Action	Current Status	Status Time
Correspondence	CRSP-100164	Requesting all franchise to send the monthly CNG consumption report	14-07-2023	Publishing	Approved	14-07-2023, 09:58 am

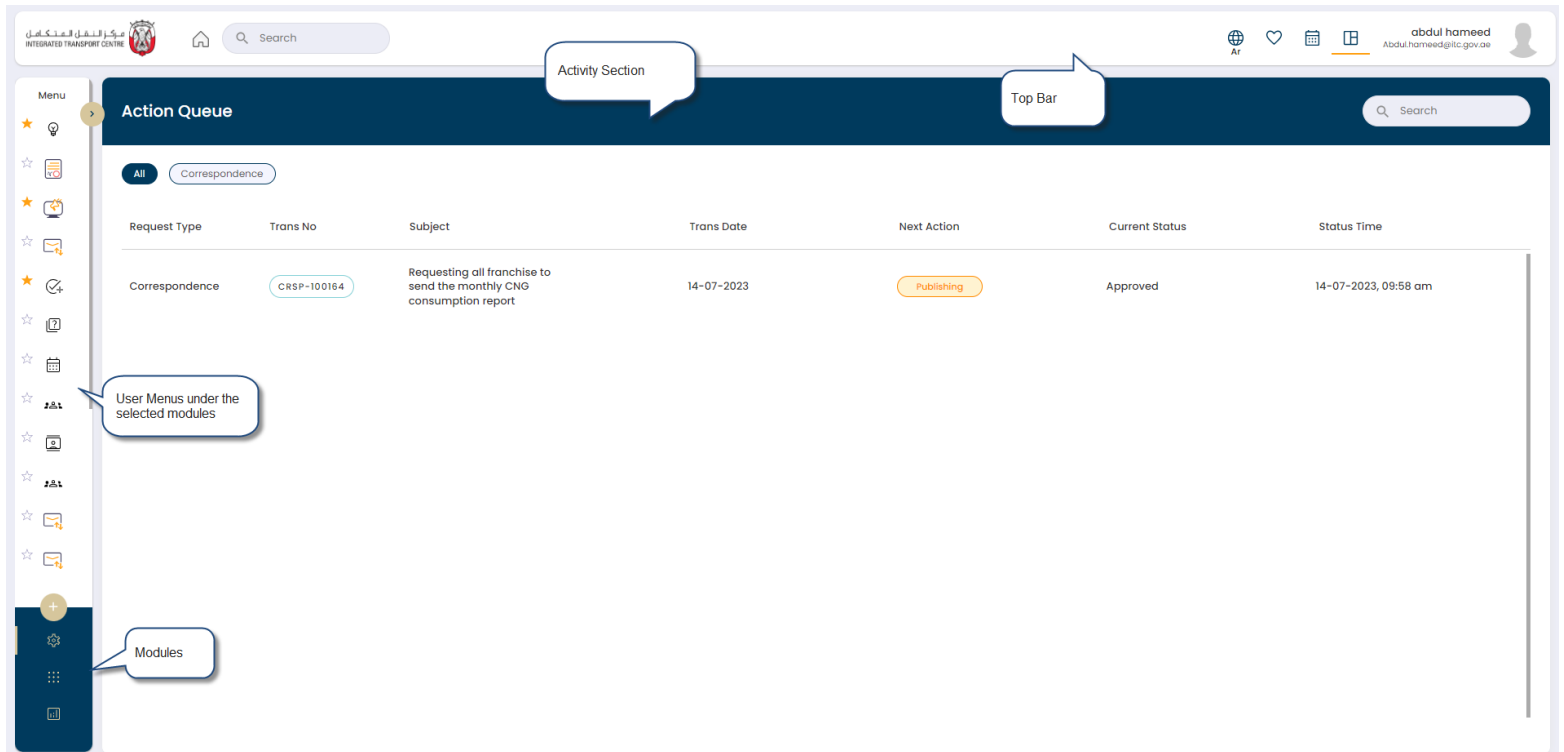
Any action pending for the user will be displayed in this section.

Home Page Components

This section will describe the functionality of the home page.

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

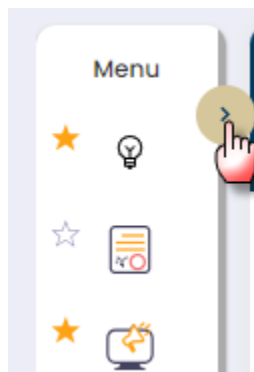
	Language switcher from Arabic to English and English to Arabic
	Favorite marked menus
	Calendar to display events
	User pending action (My action Queue)
	User image update link and logout
	Home Page navigation

Transactions

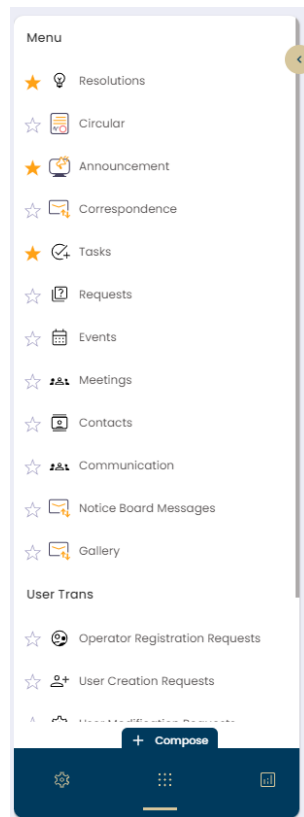
To navigate to transaction, select the transaction module, this will list the transactions that the user has access to, in the FRM Module.



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

★📍 Resolutions

☆📄 Circular

★📢 Announcement

☆✉ Correspondence

★🕒 Tasks

☆📅 Requests

☆📅 Events

☆👥 Meetings

☆📇 Contacts

☆🗣 Communication

☆📄 Notice Board Messages

☆🖼 Gallery

User Trans

☆👤 Operator Registration Requests

☆👤 User Creation Requests

+ Compose

Correspondence

🔍 Search text

📄 Export

+ Add New

🏠 Filter

Trans No	Trans Date	Title	Direction	Status	Created by	Created Time	Published	
CRSP-100160	25/06/2023	القرارات الشهرية المتعلقة بطلبات الترخيص (SSC) - المصم	↕	Published	AH Abdul Hameed	25/06/2023 15:29:01	Yes	⋮
CRSP-100161	12/07/2023	Test Correspondence Email from FRM Test...	↕	Published	AH Abdul Hameed	12/07/2023 10:57:36	Yes	⋮
CRSP-100164	14/07/2023	Requesting all franchise to send the...	↕	Approved	AH Abdul Hameed	14/07/2023 09:58:27	No	⋮

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.

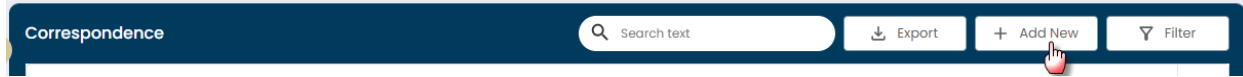
Correspondence									
Trans No	Trans Date	Title	Direction						
CRSP-100160	25/06/2023	الواتير الشهيرة المعلقة بيندقات ...أشهر مايو - (SSC) الخصم	↑	Published	Abdul Hameed	25/06/2023 15:29:01	Yes	...	
CRSP-100161	12/07/2023	Test Correspondence Email from FRM Test...	↑	Published	Abdul Hameed	12/07/2023 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.

CRSP-100164	14/07/2023	Requesting all franchise to send the...	↑	Approved	Abdul Hameed	14/07/2023 09:58:27	No	...	
-------------	------------	--	---	----------	--------------	---------------------	----	-----	--

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

Correspondence - New English ☒ Arabic ×

Reference Number

Subject

Document Date
14/07/2023

Keywords

Operators

☒ Send To Configured Roles
☐ Schedule

[VIEW CONFIG](#)
[VIEW RECEIPT](#)

ملف تحرير عرض إدراج التنسيق الأدوات جدول تعليمات

...
14px
Helvetica
☰
☰
I
u
B
I
u
B
↶
↷


0 الكلمات

Recipients

Tags

Related Items

Attachments



Click or Drop Files Here

Add New Task

No Tasks Available, Please click the Add Button and Create

Close

Save As Draft

Save & Send Test Mail

Submit For Approval

Save & Approve

Save, Approve & Publish

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.

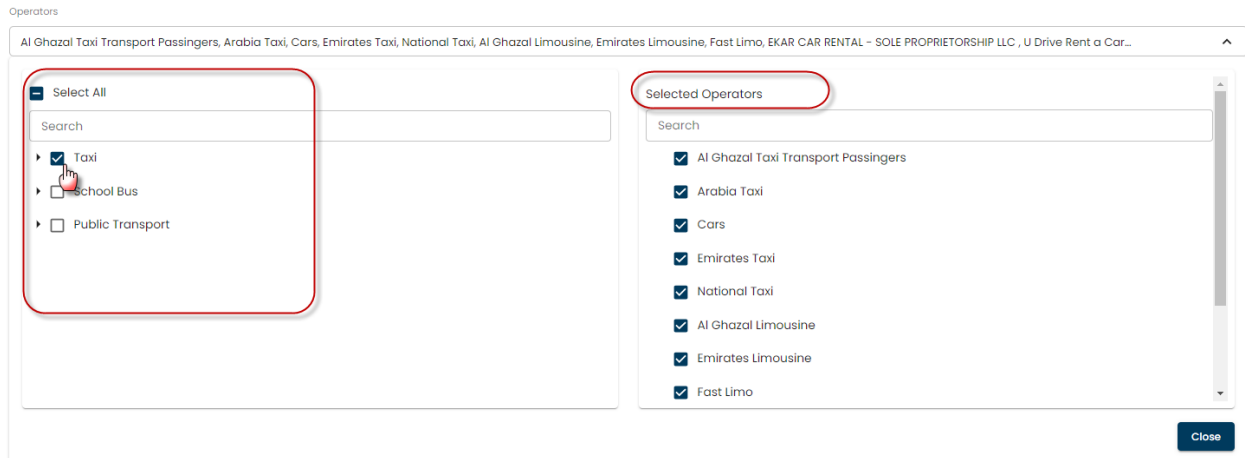


Header Section Functionality

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



In the operator list user can see the list of operators to which the user has access. On selection of operators from the left section system will move the operators to selected section.

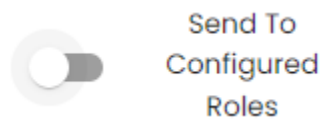


To remove a particular selected operator, click on the operator which need to be removed

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

Document Date 14/07/2023	Keywords	<input checked="" type="checkbox"/> Schedule	Schedule Date 14/07/2023 10:55 am
-----------------------------	----------	--	--------------------------------------

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.

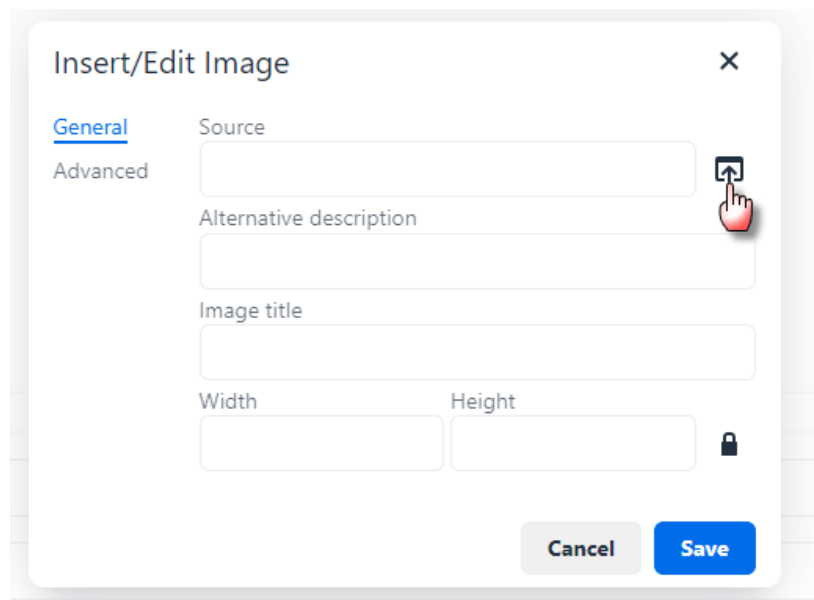


Copy and paste: This feature allows users to copy text from other sources such as web pages or documents and paste it into the editor.

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

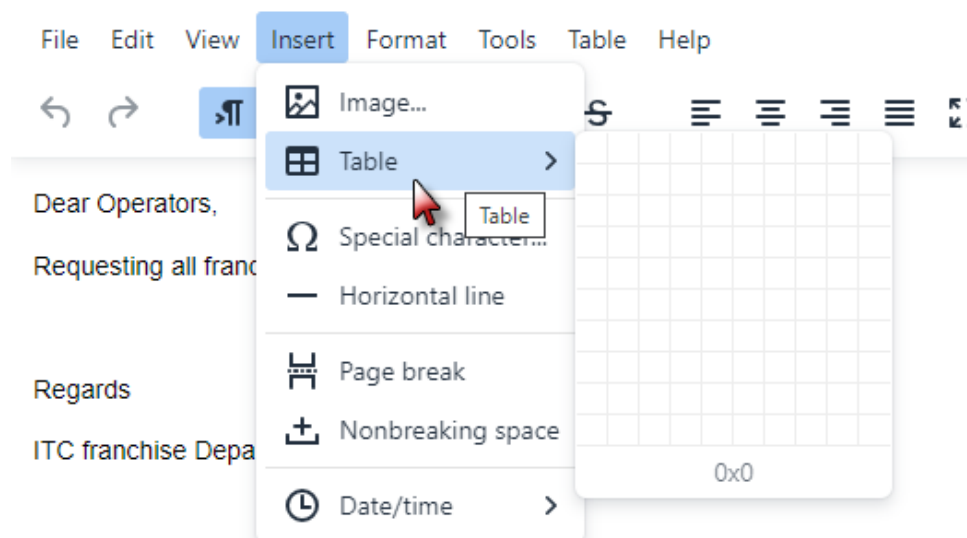


Insert media: This feature allows users to insert media such as images, videos, and audio files into their text.



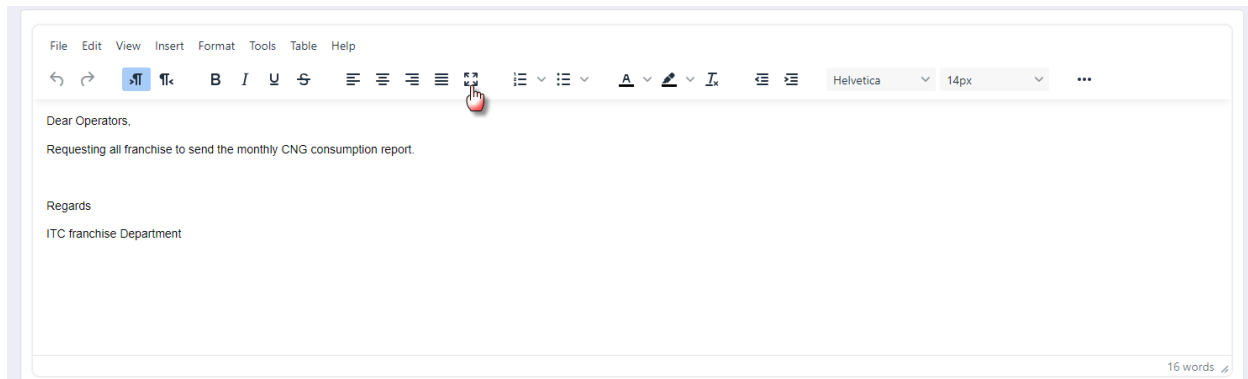
The dialog box titled "Insert/Edit Image" has a close button (X) in the top right corner. It contains two tabs: "General" (selected) and "Advanced". Under the "General" tab, there are four input fields: "Source" (with a small image icon to its right), "Alternative description", "Image title", and "Width" and "Height" (separate fields with a lock icon to the right of the Height field). At the bottom, there 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.

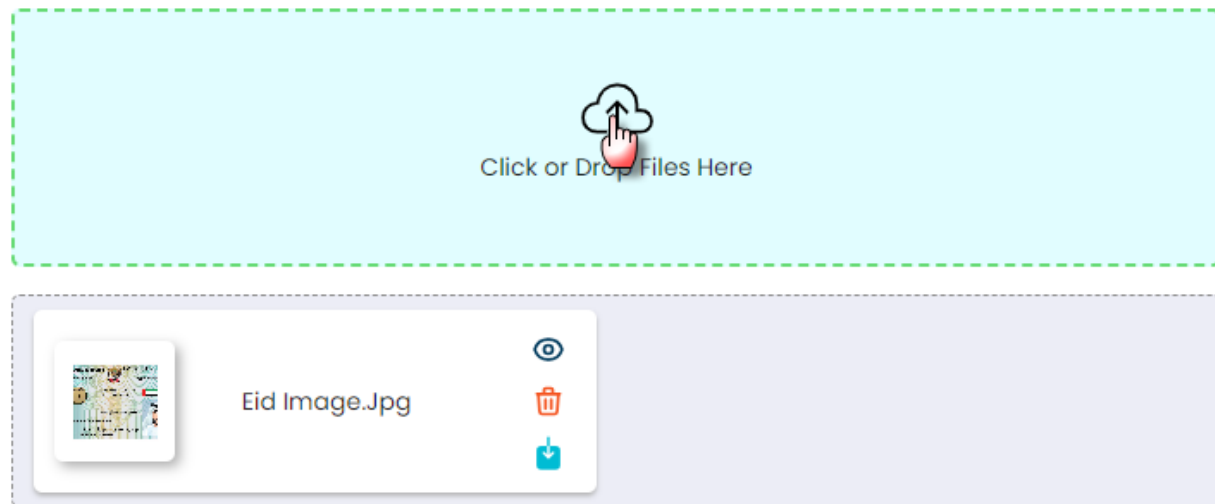


Minimize editor : Click on the maximize icon once more to minimize to previous state

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

Close	Save As Draft	Save & Send Test Mail	Submit For Approval	Save & Approve	Save, Approve & Publish
	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 for Approval	This will save the transaction and submit for approval, the user who has access for approval will see this transaction in the action queue			
	Save & Approve	This will save the transaction and approve the transaction at the same time.			
	Save Approve & Publish	This will save the transaction approves the transaction and at the same time publish the transaction. Which is the last process to publish the transaction to end user.			