Partex Star Group Automation

User Manual (ADMIN)

Contents

1. Sign IN

1.0.   Sign in:

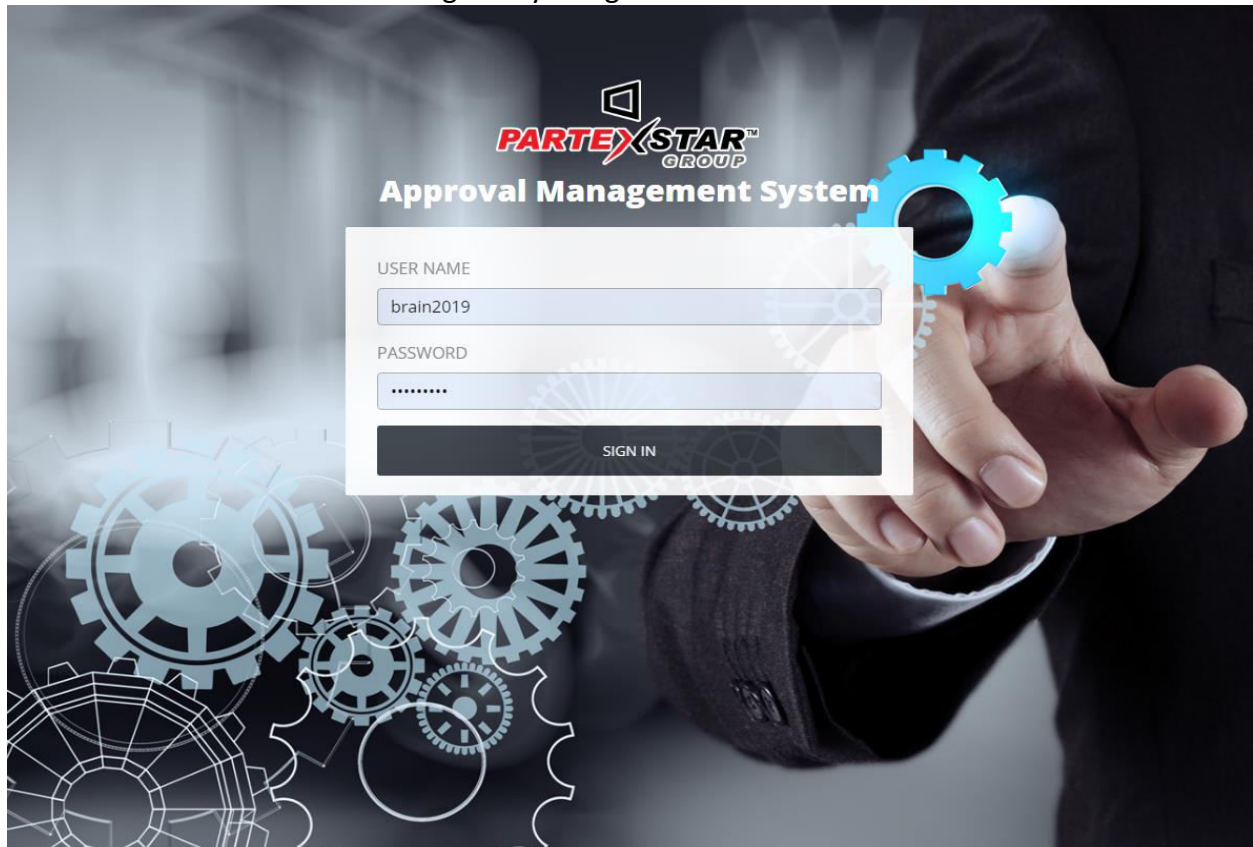User can sign in by using valid AD Username and Password.

Fig: Sign in page

2. Dashboard

2.0.   Dashboard:

After successful sign in user will land into dashboard page where user can see total number of inbox, pending request, Archive and Users. All the icon are linkable here so user can go to the following option from here by clicking individual icon.
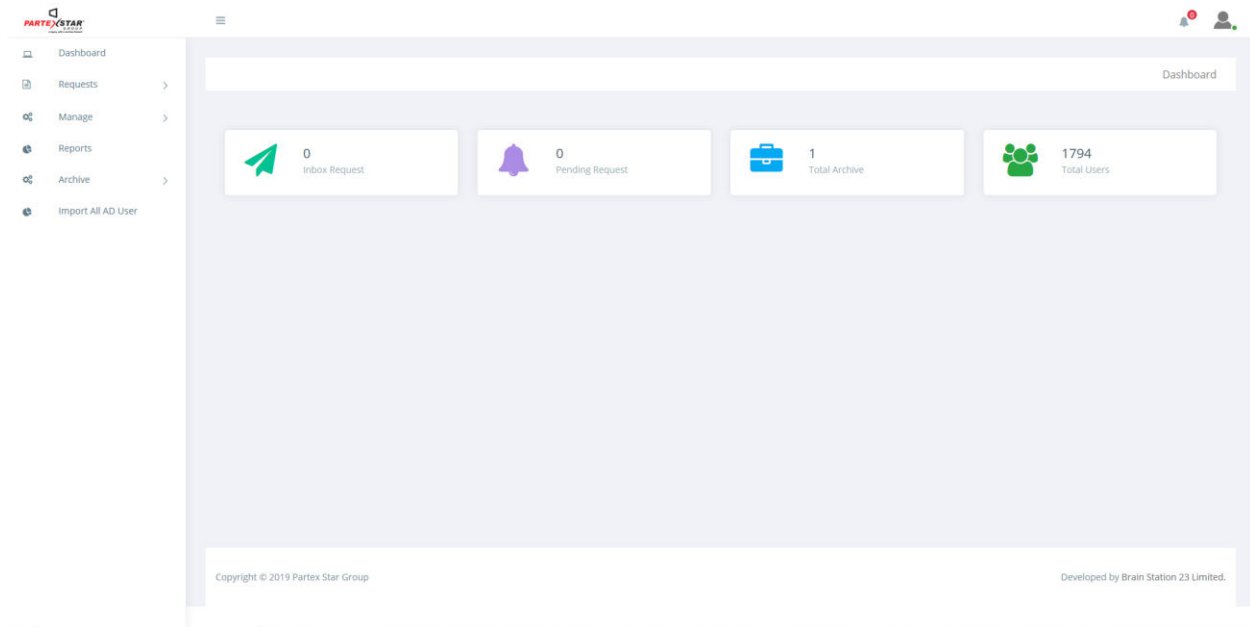
Fig: Dashboard Page

3. Request

3.0. **Request**:

By clicking request from left panel user can see all the request sub field Inbox, New, My request status, Drafts, Request for info, Approved, Rejected in menu bar.
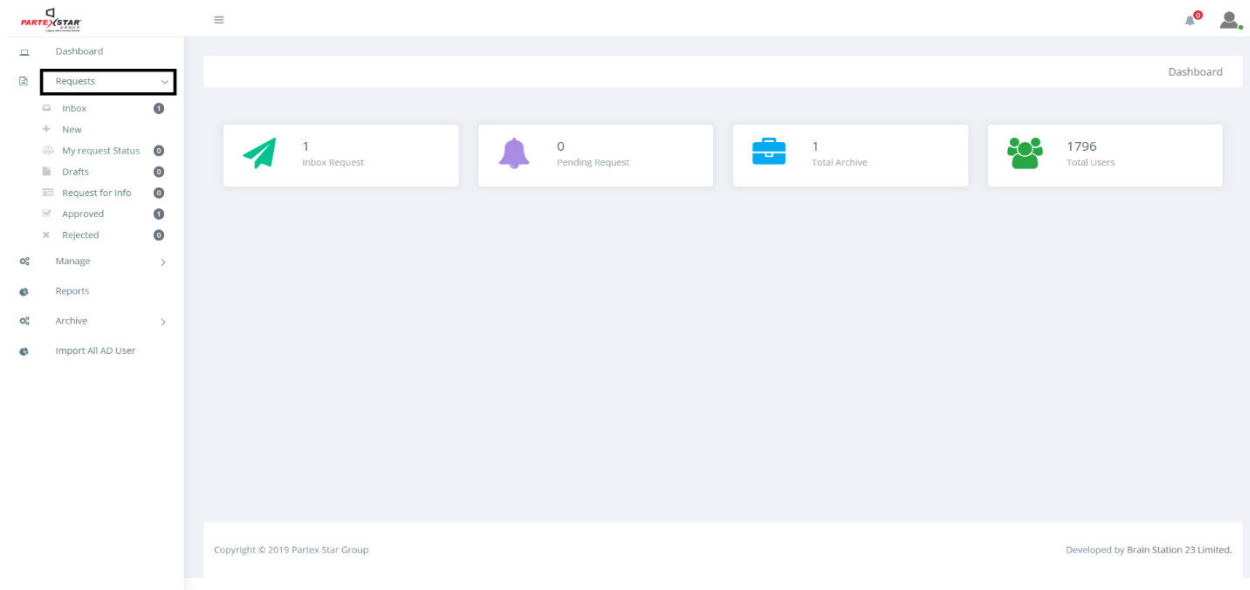

Fig: Request Panel

3.1. Inbox:

By clicking inbox user can see all his/her request status and is there any request waiting for his/her approval. There is a search field for searching any specific request.
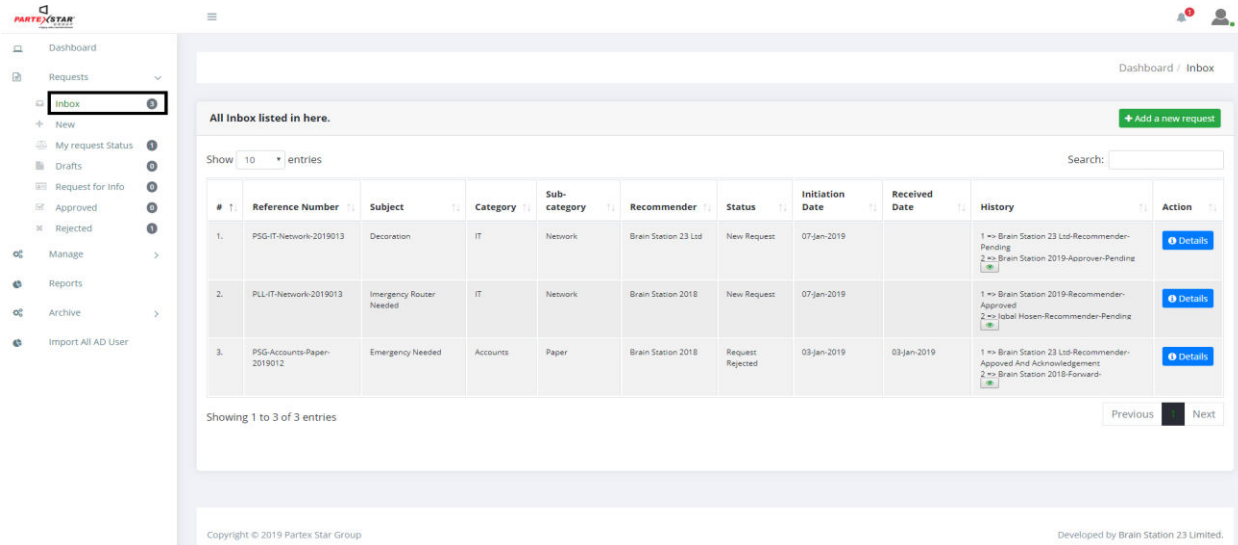

Fig: Inbox Page

3.1.1. Creating a request:

User can create a new request from inbox. To create a new request click "**Add a new request**" from inbox page/ "**New**" button from menu bar a new webpage will appear and user have to fill all the require dropdown (Company, Category, Sub-category), chose recommender and approver from search option and fill the mandatory input field(Subject, Description). And finally click submit button to create a fresh request successfully. There is also an attachment field for user to add attachment if needed (attachment must be below 2mb).

Fig: Create a new request step 1

OR

Fig: Create a new request step 1

Fig: Create a new request step 2

There is also an advance search option for finding recommender/approver and user can add multiple recommender and approver by clicking '**+**' Button.

Fig: Search recommender/approver

Fig: Advance Search recommender/approver.

Fig: Selecting multiple recommender/approver.

3.1.2. Approve a request:

To approve a request which are waiting for user approval at first click **Details** button from inbox page to see the details of the request and then from details page click **Approve** checkbox and send request to next step by clicking **Submit** button from details page. There is also a comment box and an attachment field available to add attachment.

Fig: Approve a request step 1

Fig: Approve a request step 2

Fig: Approve a request step 3

3.1.3. Reject a request:

To reject a request which are waiting for user approval at first click **Details** button from inbox page to see the details of the request and then from details page click **Reject** checkbox and send request to next step by clicking **Submit** button from details page. There is also a comment box and an attachment field available to add attachment.

Fig: Reject a request step 1

Fig: Reject a request step 2

Fig: Reject a request step 3

3.1.4. Request for info:

To perform "request for info" for request which are waiting for user approval at first click **Details** button from inbox page to see the details of the request and then from details page click **Request for info** checkbox and choose by whom you are demanding info from search (By default it is selected as initiator) and finally click **Submit** for sending the request to next step. There is also a comment box and an attachment field available to add attachment.

Fig: Request for info step 1

Fig: Request for info step 2

Fig: Request for info step 3

3.1.5. Forward a request:

To forward a request to other user Click **Forward** checkbox from details page and choose by whom you are forwarding then click **Submit** button to send the request to next step. There is also a comment box and an attachment field available to add attachment.
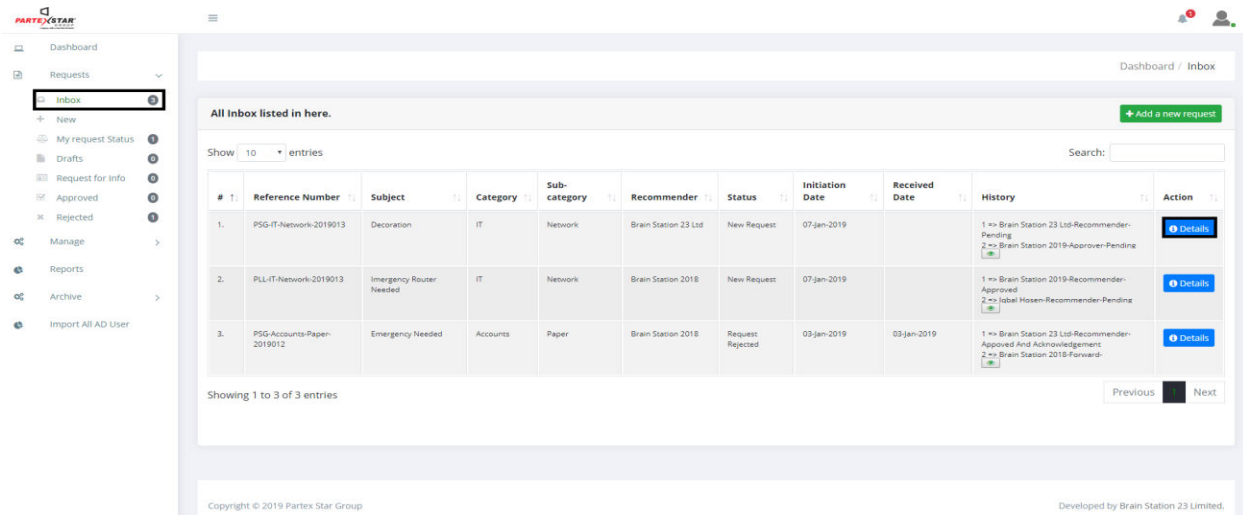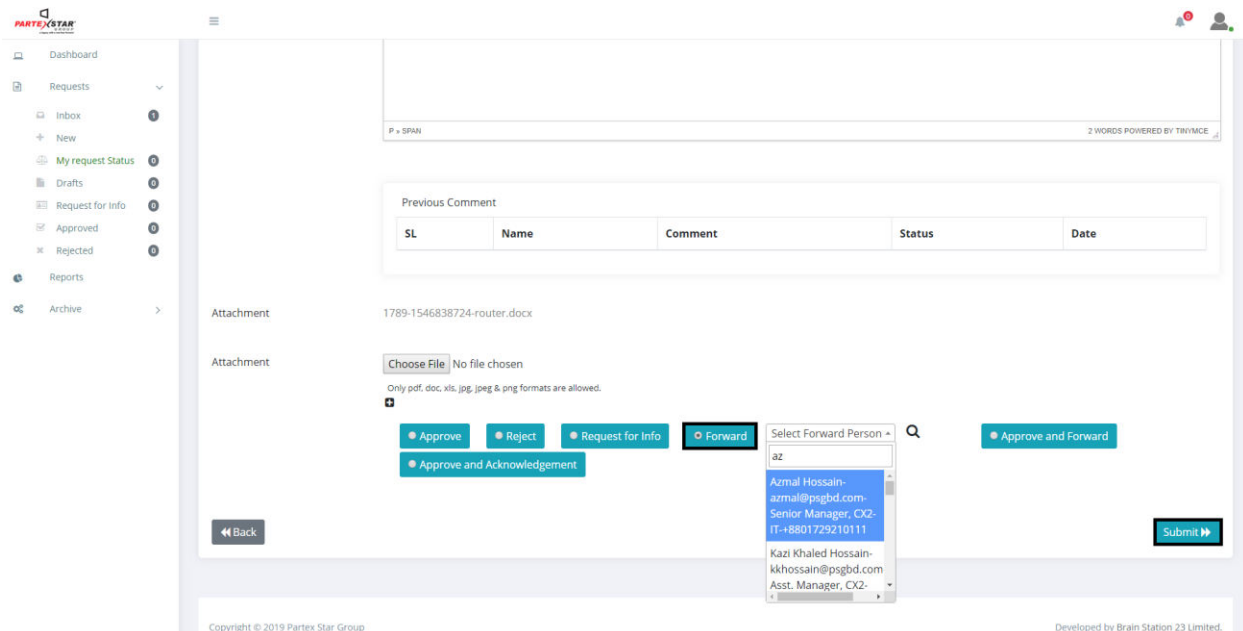

Fig: Forward a request step 1

Fig: Forward a request step 2

3.1.6. Approve and forward:

To approve and forward a request to other user Click **Approve and forward** checkbox from details page and choose by whom you are

forwarding then click **Submit** button to send the request to next step. There is also a comment box and an attachment field available to add attachment.
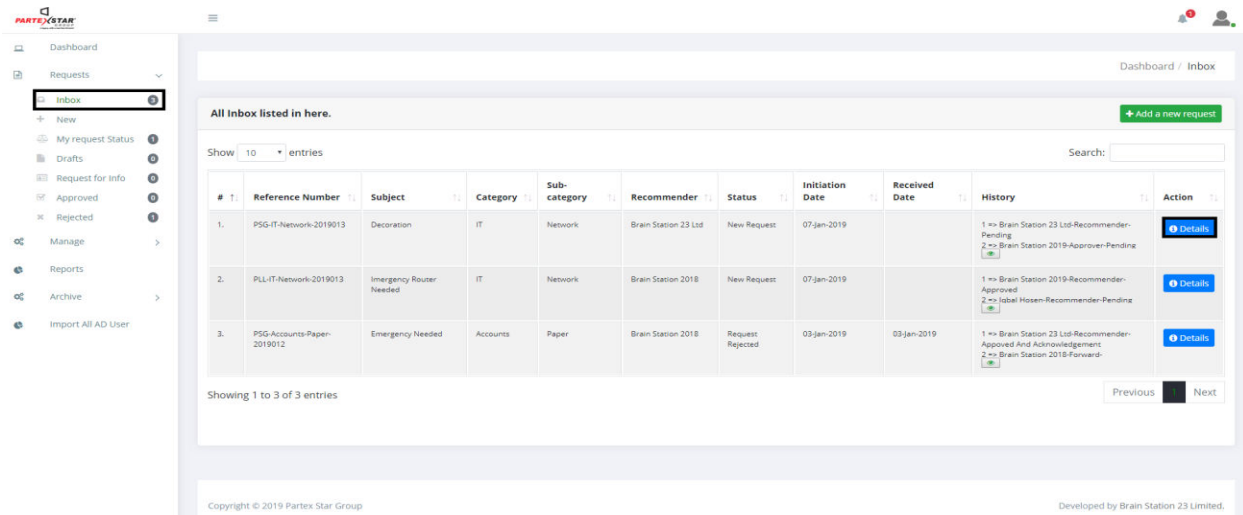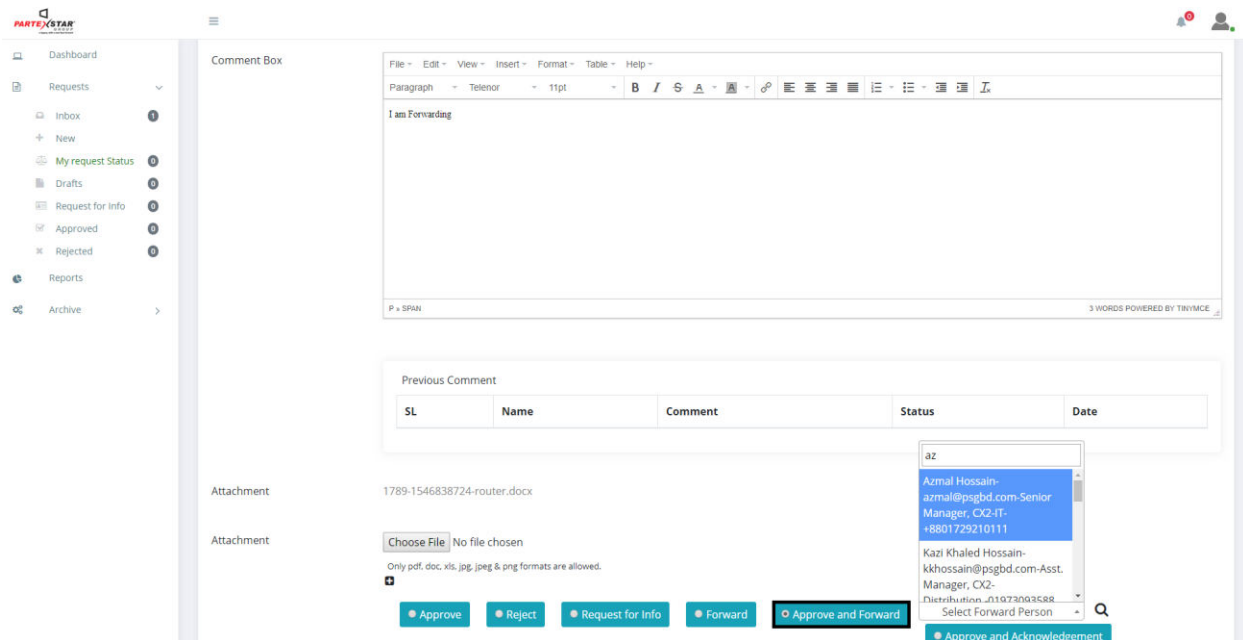

Fig: Approve and forward a request step 1

Fig: Approve and forward a request step 2

Fig: Approve and forward a request step 3

3.1.7. Approve and acknowledgement:

To approve and send a notification to other user Click **Approve and acknowledgement** checkbox from details page and choose by whom you want to send a notification, then click **Submit** button to send the request to next step. There is also a comment box and an attachment field available to add attachment.

Fig: Approve and acknowledgement a request step 1

Fig: Approve and acknowledgement a request step 2

3.2. My Request Status:

From my request status user can see those request which are pending for approval. User can also see the details of any pending request by clicking "**Details**" button from "My request status" page.

Fig: My request status page

Fig: My request status details page

3.3. Drafts:

From "Drafts" user can see all the request which are saved by him/her for further Posting. From here user can edit any saved request and submit anytime for posting a request.
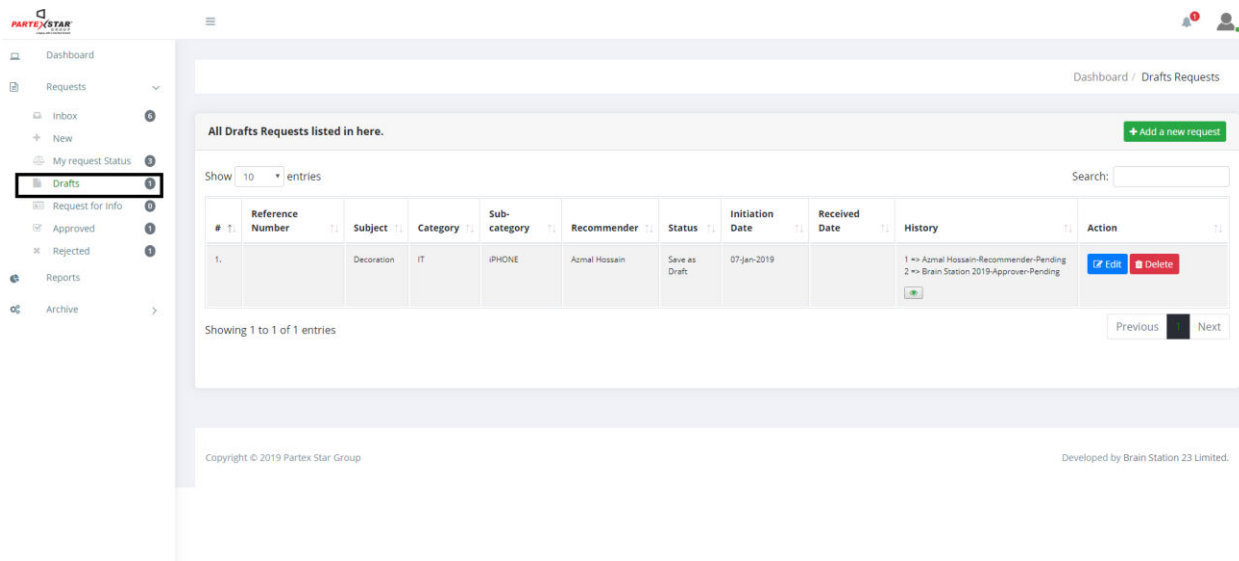

Fig: Save as drafts

Fig: View drafts item and further edit.

3.4. Request for info:

If any recommender/approver is demanding any info from user, he/she can see those request by clicking "**Request for info**" option and add information by clicking "Details" button. After adding information click "**Submit**" for send the request to next step.
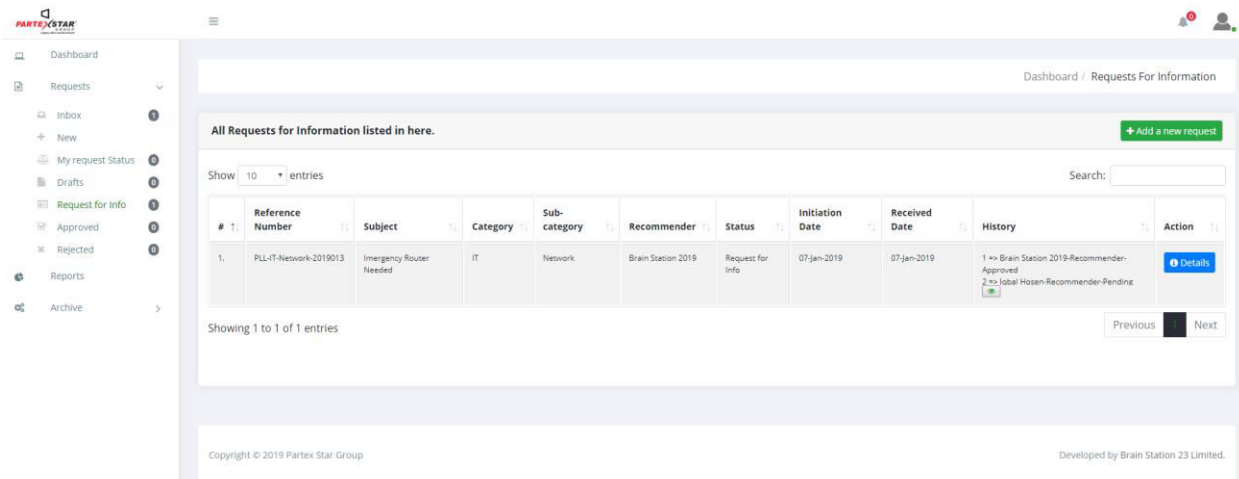

Fig: View Request for info

Fig: Add information

Fig: Submit information

3.5. **Approved:**

By clicking "**Approved**" option user can see all approve request list created by user and can see details of the request by clicking "**Details**" button.
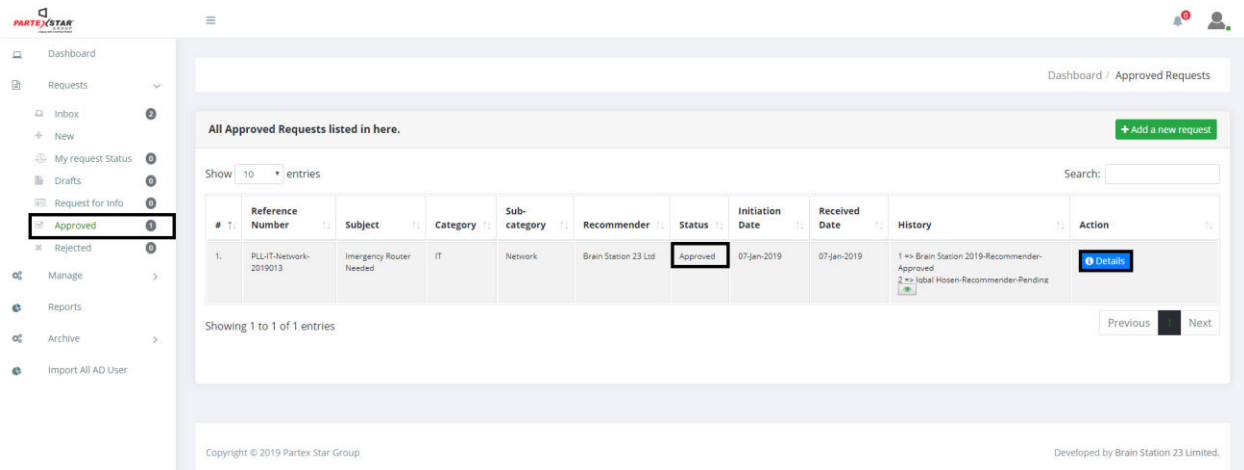
Fig: Approved request list

3.6. Rejected:

By clicking "**Rejected**" option user can see all approve request list created by you and can see details by clicking "**Details**" button.
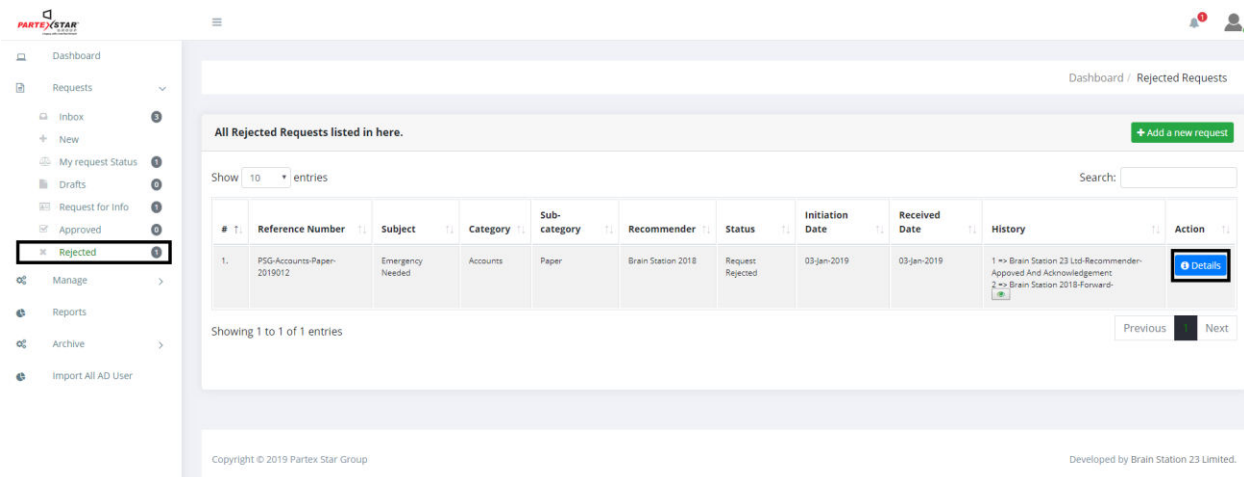

Fig: Rejected Request List

4. Reports

4.1. Reports (Initiated):

By clicking "**Reports-> Initiated request report**" from search admin user can see all the reports which are pending, approved, rejected by using searching option. And take a print of report as pdf format. Admin can use search filter for specific report search by giving individual information. By clicking "view" button admin can see details of any report. From Initiated Reports admin user can see all the reports which are initiated by user. From Recommended/ approved Reports admin user can see those request which are recommended/approved by all user.

Fig: Report search (Initiated Report)

Fig: Report Details view

4.2. **Reports (Recommendation/approval):**

By clicking "**Reports-> Recommendation/approval report**" from search admin user can see all the reports which are recommended/approved/ rejected by him using searching option.

Fig: Report search (Recommendation/approval Report)

4.3. Report (Audit):

By clicking Audit Report admin user can see all the reports (Company wise search)

Fig: Report search (Audit Report)

5. Archive:

5.1. Archive:

By clicking **Archive** admin user can find two option live and archive. From live he/she can see all the approved request and send them to archive by clicking "Archive" button. Admin can send approved request (initiate by him) to archive by clicking "Archive" button from live page. He can also see the details from here by clicking details button.
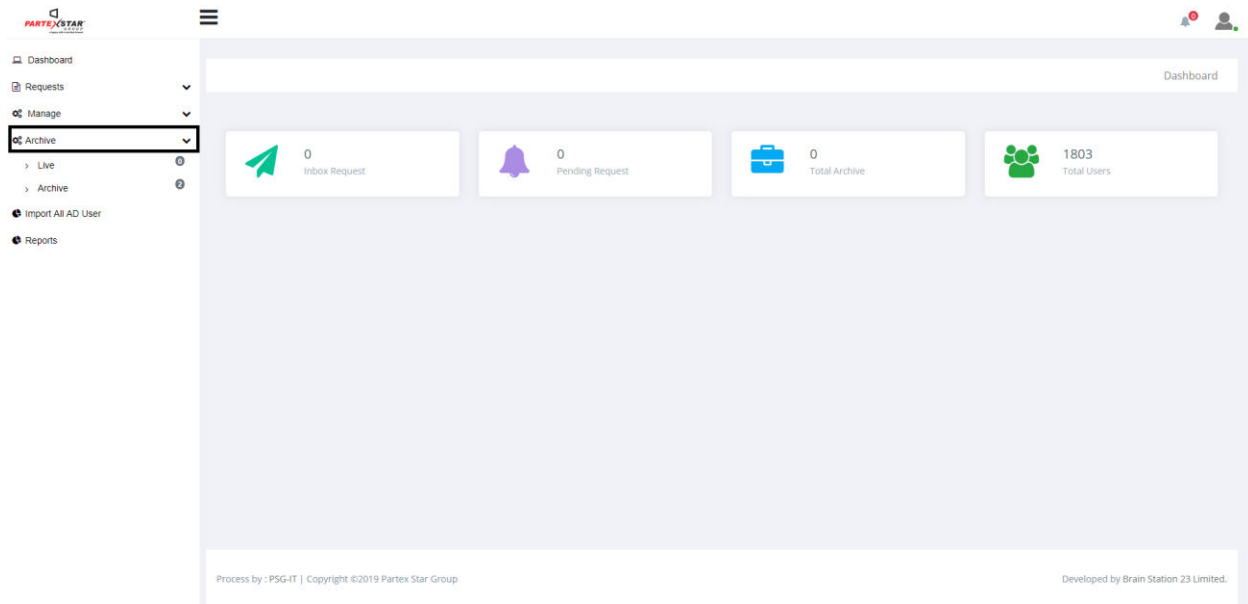
Fig: Archive
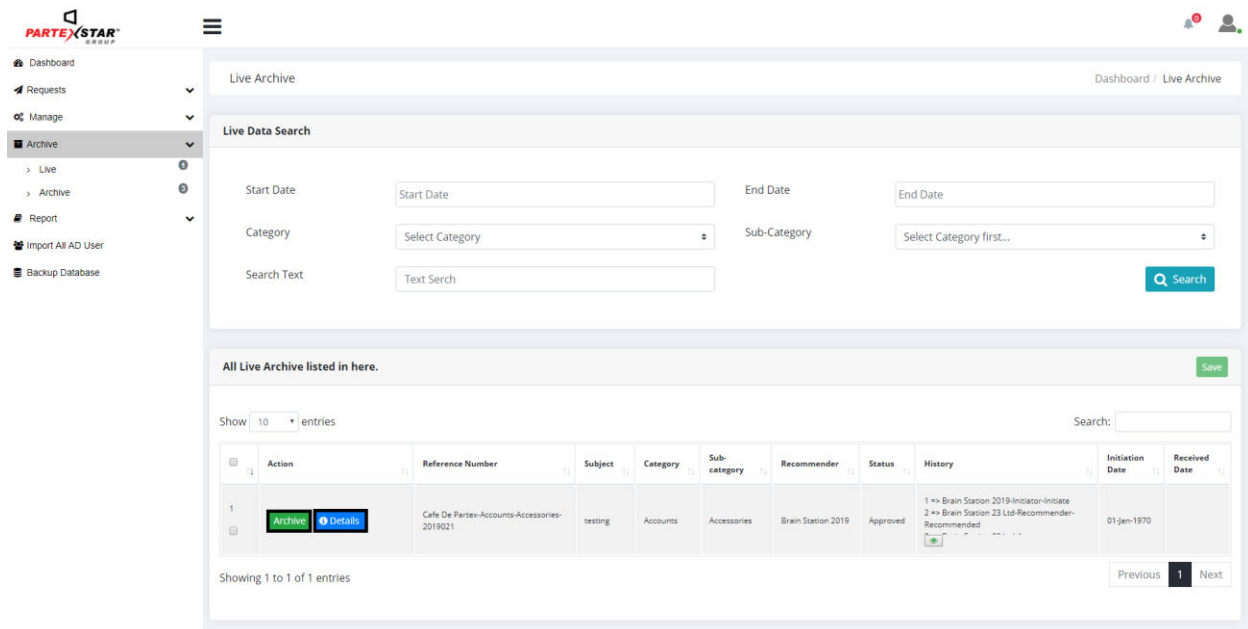
Fig: Sending live to archive

To send multiple request in archive at a same time first mark item from left column and click "Send to Archive" button to send all the request in archive.

Fig: Archive (Send multiple item to archive)
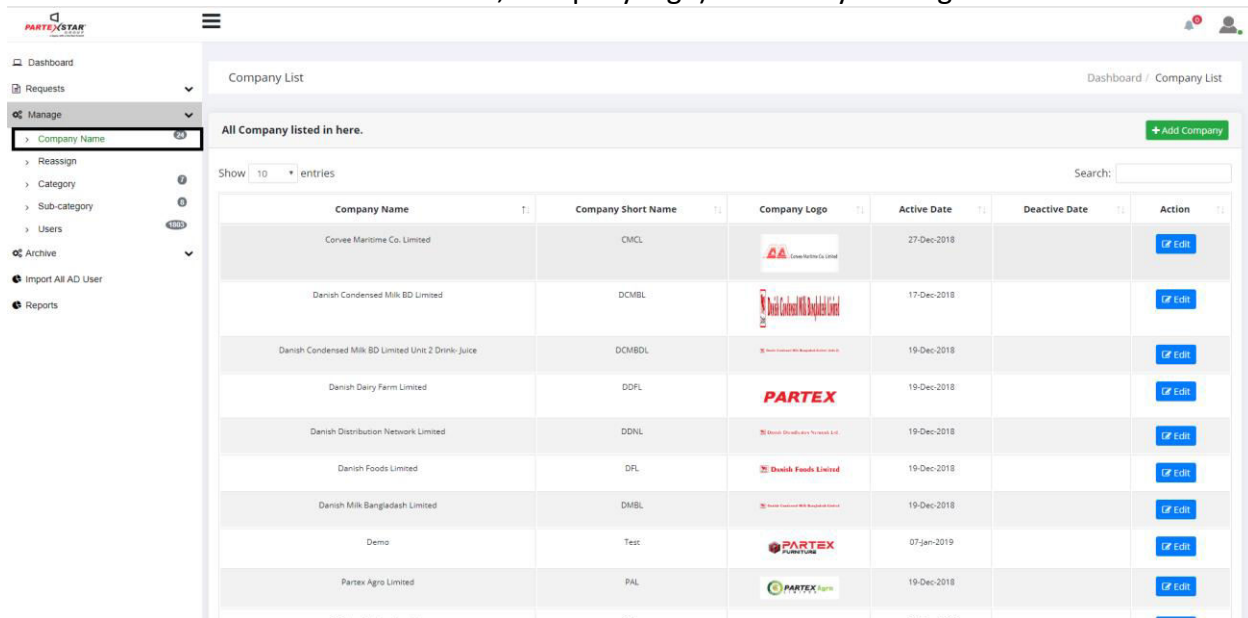
Fig: Live Details show

6. Manage:

6.1. Company Manage:

      Admin can manage (add, edit, delete) company by clicking "Company" from **Manage**. By clicking company a new webpage will appear from there admin can add new company. By clicking "+add company" button a new webpage will appear again and admin can add company by giving following information (name, short name, active date, deactivate date, Company logo) and finally clicking "submit" button.

Fig: Company list page

Fig: Add company step 1

Fig: Add company step 2

To edit any category/company click "**Edit**" button from company page and after changing information click "Update" for successfully editing.

Fig: Edit company information step 1

Fig: Edit company information step 2

6.2. Category/Sub Category Manage:

From "**Manage**" option in the left panel Admin can manage (create, read, update, delete) all the category and subcategory by clicking individual option. To add new company, category and sub category click **"+Add Category/sub-category**" button from category/sub-category page. To delete any category click "**Delete**" button from category/sub-category page. To edit any category/sub category click "**Edit**" button from category/sub-category page.

Fig: Add Category step 1

Fig: Add Category step 2

Fig: Edit Category step 1

Fig: Edit Category step 2

Fig: Delete Category

Fig: Add Sub Category
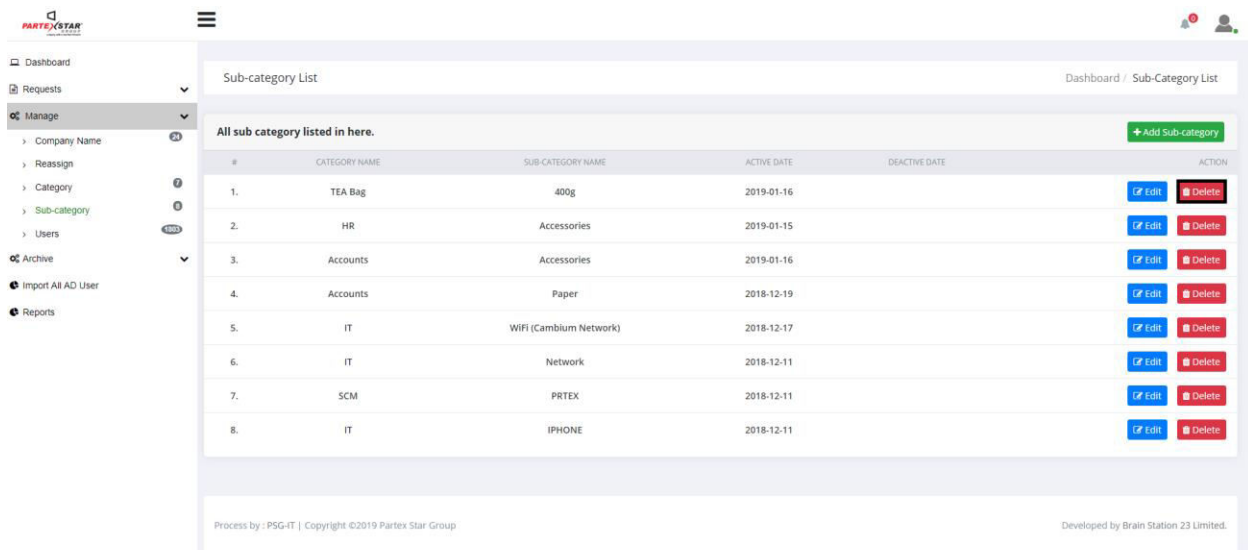

Fig: Edit Sub Category

Fig: Delete sub category

6.3. Role management:

By clicking "User" from **Manage** admin can see all the user along with their role. Admin can make any user to admin by clicking "Make admin" button and make any user to audit user by clicking "Make Audit" button from user list page and vice versa.
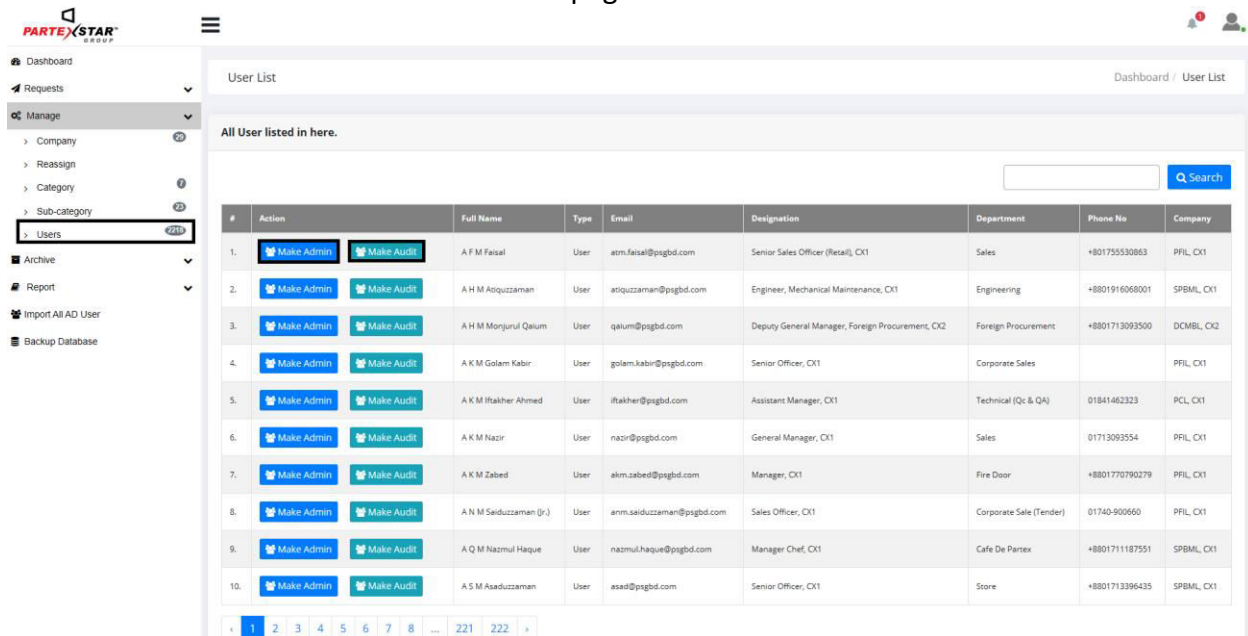

Fig: User role Management

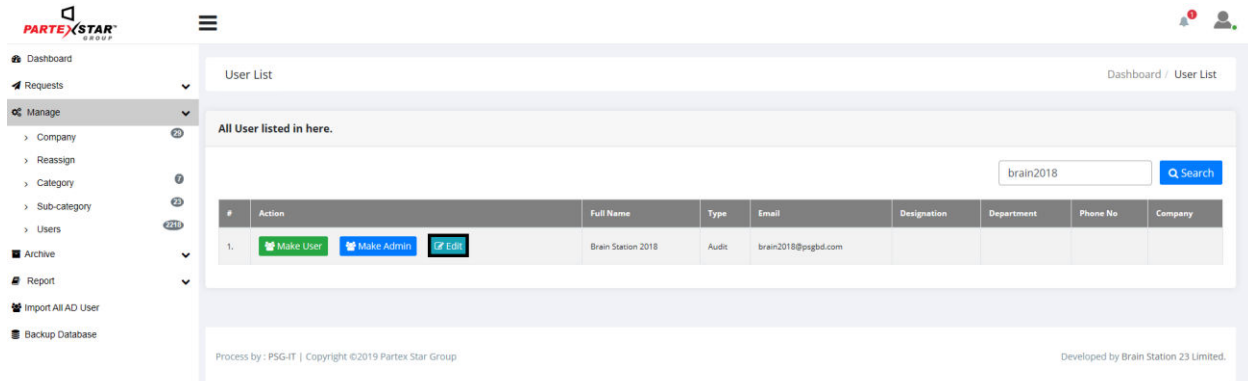Admin can assign company for audit user and make change to assign company by pressing edit button.
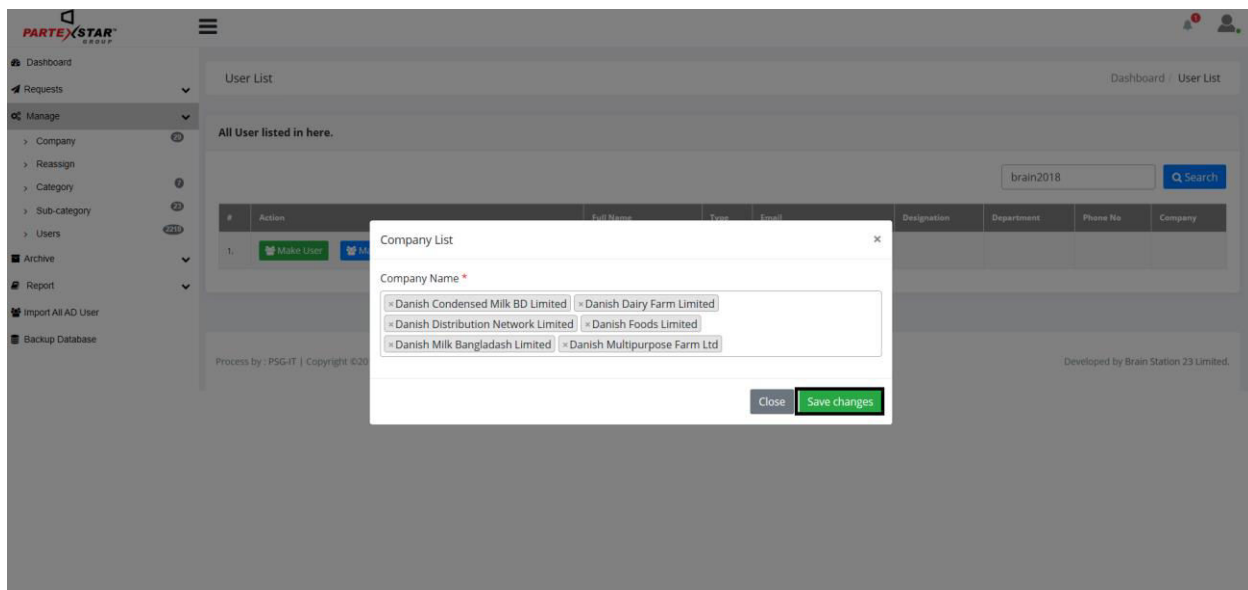

Fig: User role Management 2

Fig: User role Management 3

Audit User can see only those assigned company request in **"Audit report".**

Fig: Audit User (Audit Report search)

6.4. Reassign:

Admin can reassign any user as initiator/recommender/approver and forward any pending task to user from "Reassign" option in **Manage.** By clicking Reassign button a new webpage will appear and from there admin can search based on user. If someone is unavailable/unable to proceed any request admin can forward the request to other user.
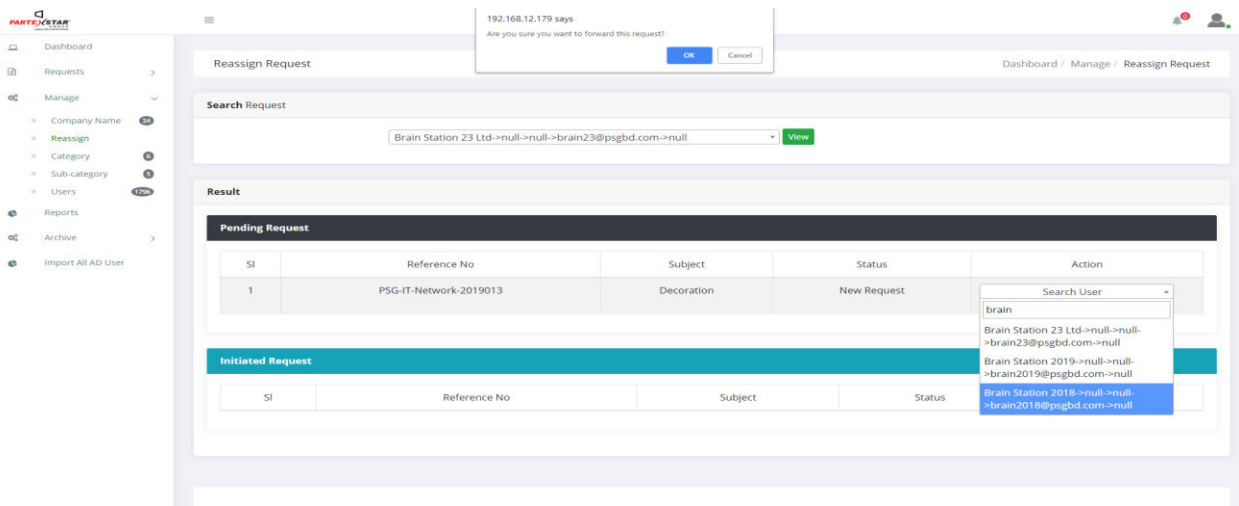
Fig: Reassign Request step 1

Fig: Reassign Request step 2

6.5. Import all AD user:

Admin can manually import all AD user by clicking this option from menu bar.

Fig: Import all AD user