



Admin User manual – Administrating and giving support for users

## **Guarantee Management System**

Release V1.0.0

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## Introduction

This user manual is designed to help you quickly get acquainted with basic tasks of Guarantee Management System's administrator.

## Audience

This manual is intended for the following User Roles:

Role	Function
Admin	Administer users, managing master data and audit trails

## Dashboard

After you have successfully logged into Guarantee Management System as an admin, the screen on (Figure 1) will be displayed.



Figure 1: main page

## Menus

- When you click on M1, you will see the admin dashboard.
- Clicking on M2 opens user management sub menu as shown in Figure 2.

- Clicking on M3 opens master data management sub menus as shown in Figure 14.
- Clicking on M4 opens audit trail sub menu as shown in Figure 30.

### Admin Dashboard

- D1 shows the total number of users on guarantee management system.
- D2 shows the number of active users.
- D3 shows the number of locked users either with too many login attempt or admin locking user in user management.
- D4 shows the number of users that are online.

### Info

- R shows the role of the user logged in.
- B shows the branch or unit of the user logged in.
- U shows user name of the user logged in.

## User Management

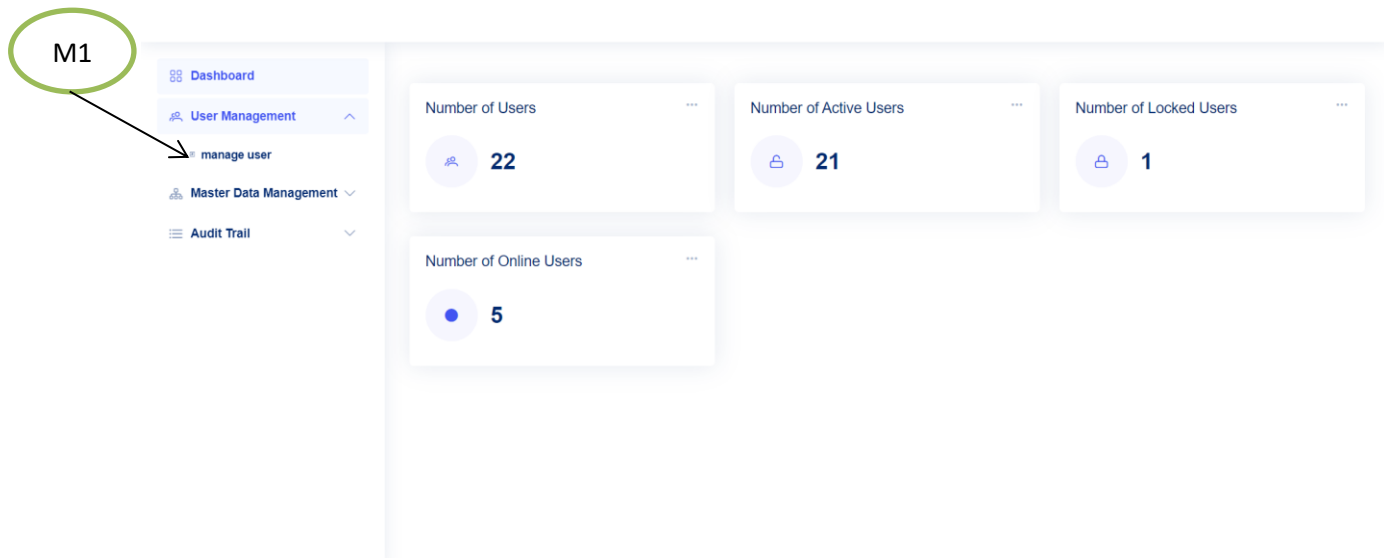


Figure 2: user management sub-menu

### Sub-Menus

- When you click on M1, it will open manage user page as shown in Figure 3.

## Manage User

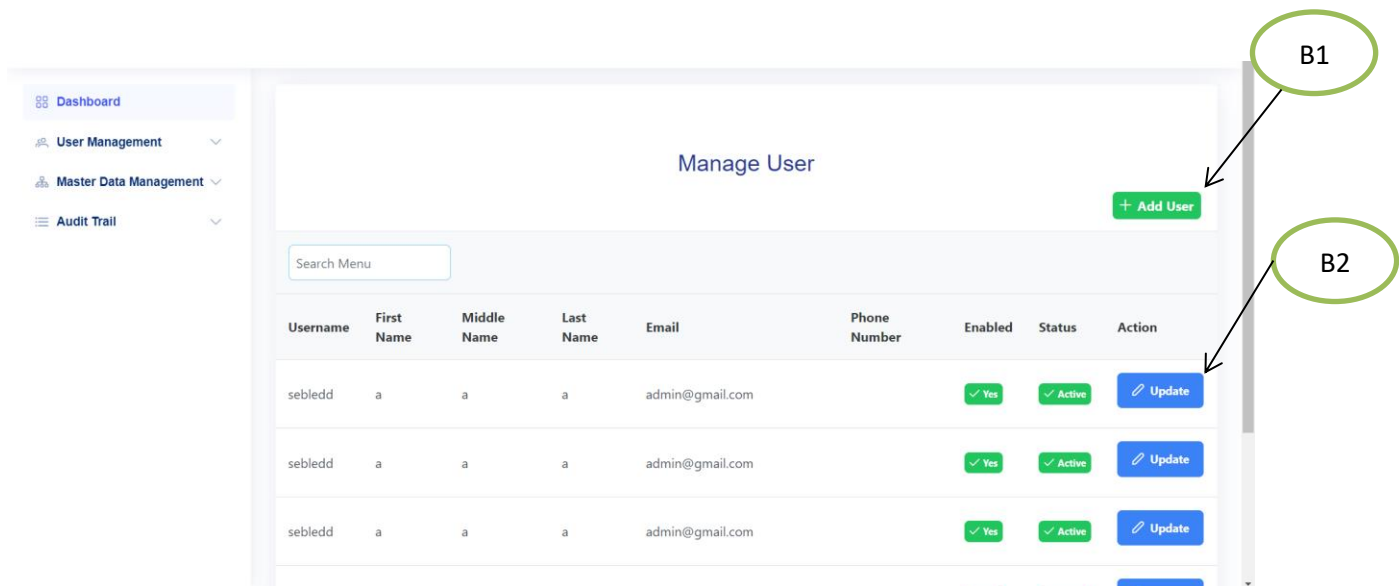


Figure 3: manage user

### Actions

- When you click on “Add User” button pointed as B1, a modal will pop up as shown in Figure 4.
- When you click on “Update” button for the specific user pointed as B2, a modal will pop up as shown in Figure 5.

## Add User

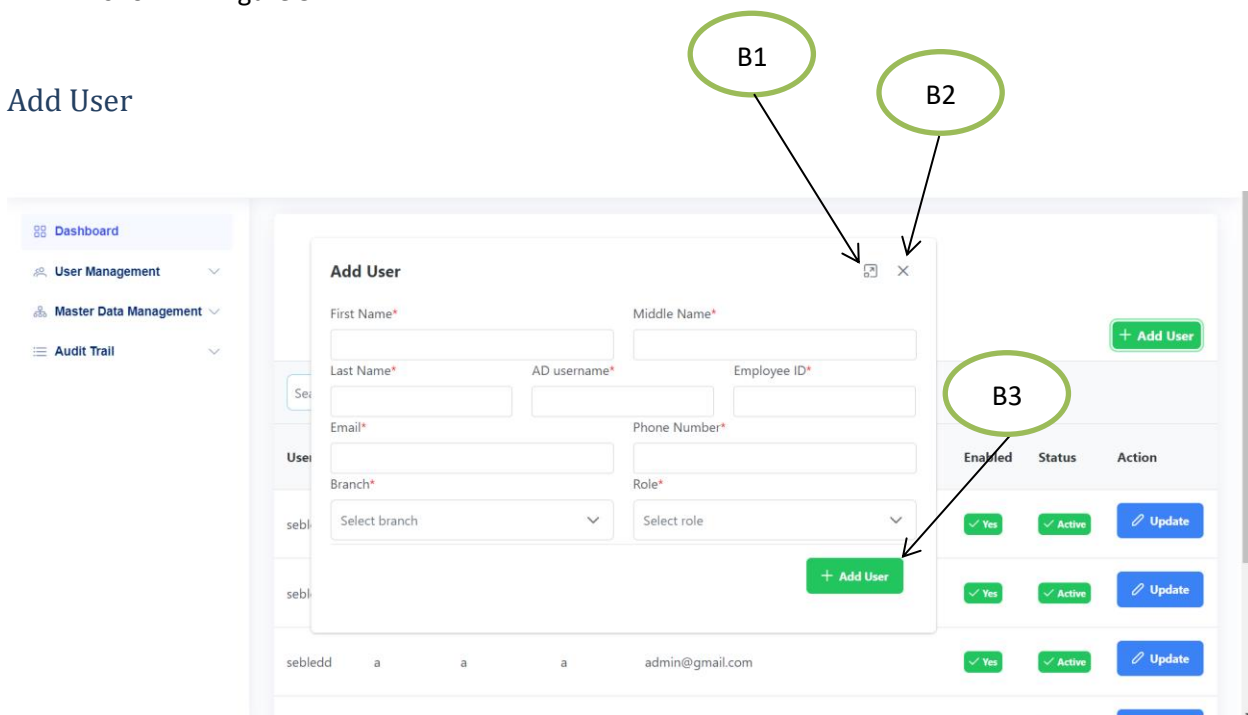


Figure 4: add user

## Actions

- When you click on B1, the modal will be full screen.
- When you click on B2, the modal will be closed.
- When you click on “Add User” button pointed as B3, a user will be added provided that all the input values are valid.

## Update User

The screenshot shows a web application interface with a sidebar on the left containing 'Dashboard', 'User Management', 'Master Data Management', and 'Audit Trail'. The main content area displays a table with columns 'Username', 'First Name', 'Enabled', 'Status', and 'Action'. A modal titled 'Update User' is open, containing form fields for 'First Name\*', 'Middle Name\*', 'Last Name\*', 'Employee ID\*', 'Email\*', 'Phone Number\*', 'Branch\*', 'Role\*', 'Is enabled', and 'User Status'. There are three callouts: B1 points to the 'X' close button, B2 points to the 'Add User' button, and B3 points to the 'Update User' button.

Figure 5: update user

## Actions

- When you click on B1, the modal will be full screen.
- When you click on B2, the modal will be closed.
- When you click on “Update User” button pointed as B3, user date will be updated provided that all the input values are valid.

# Master Data Management

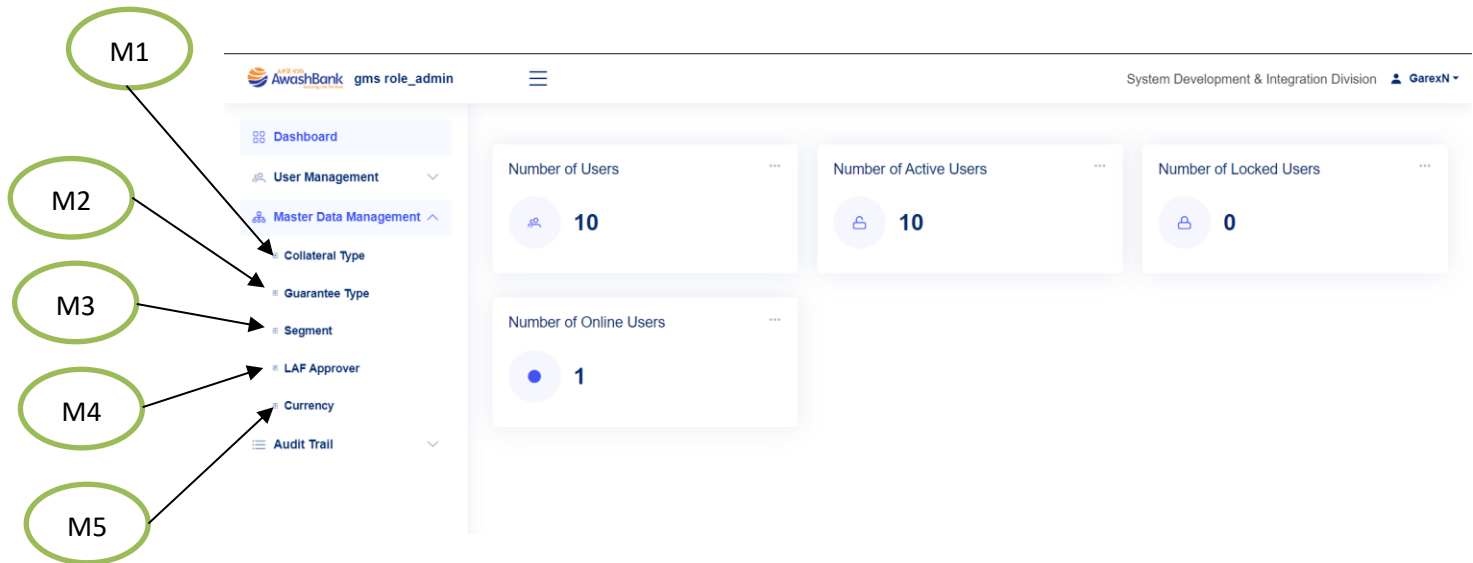


Figure 6: master data management sub-menus

## Sub-menus

- Clicking on M1 opens manage collateral page as shown in Figure 7.
- Clicking on M2 opens manage guarantee type page as shown in Figure 12.
- Clicking on M3 opens manage segment page as shown in Figure 15.
- Clicking on M4 opens manage LAF approver page as shown in Figure 18.
- Clicking on M5 opens manage currency page as shown in Figure 21.



# Collateral Type

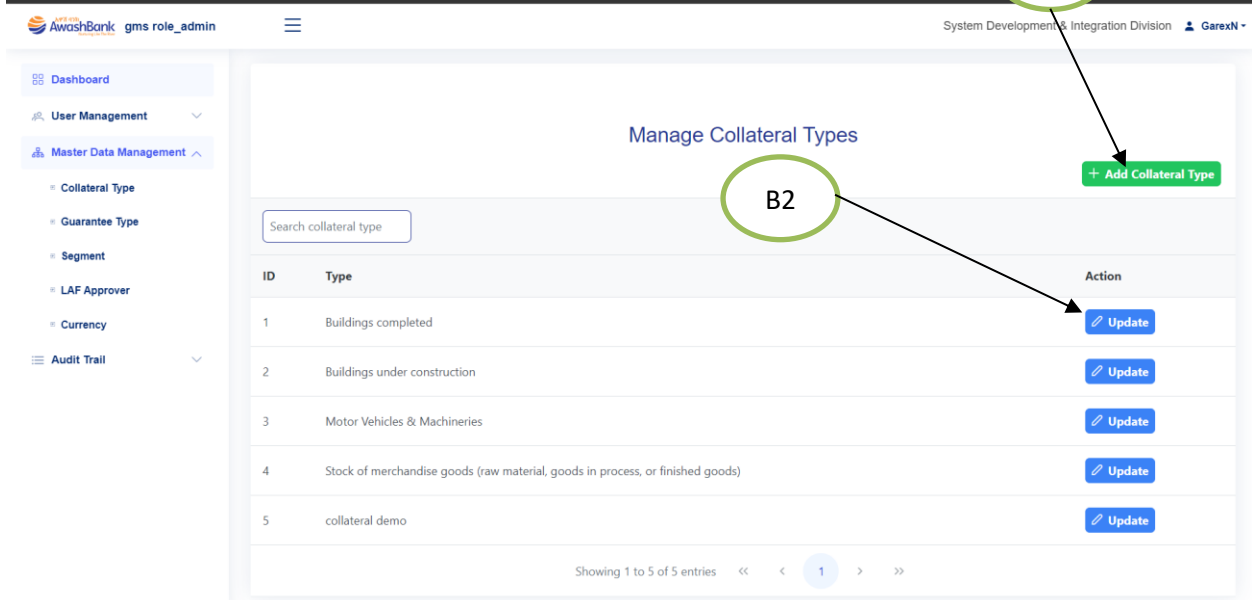


Figure 7: manage collateral type

## Actions

- When you click on “Add Collateral Type” button pointed by B1, a modal will pop up as shown in Figure 8.
- When you click on “Update” button pointed by B2, a modal will pop up as shown in Figure 9.

## Add Collateral Type

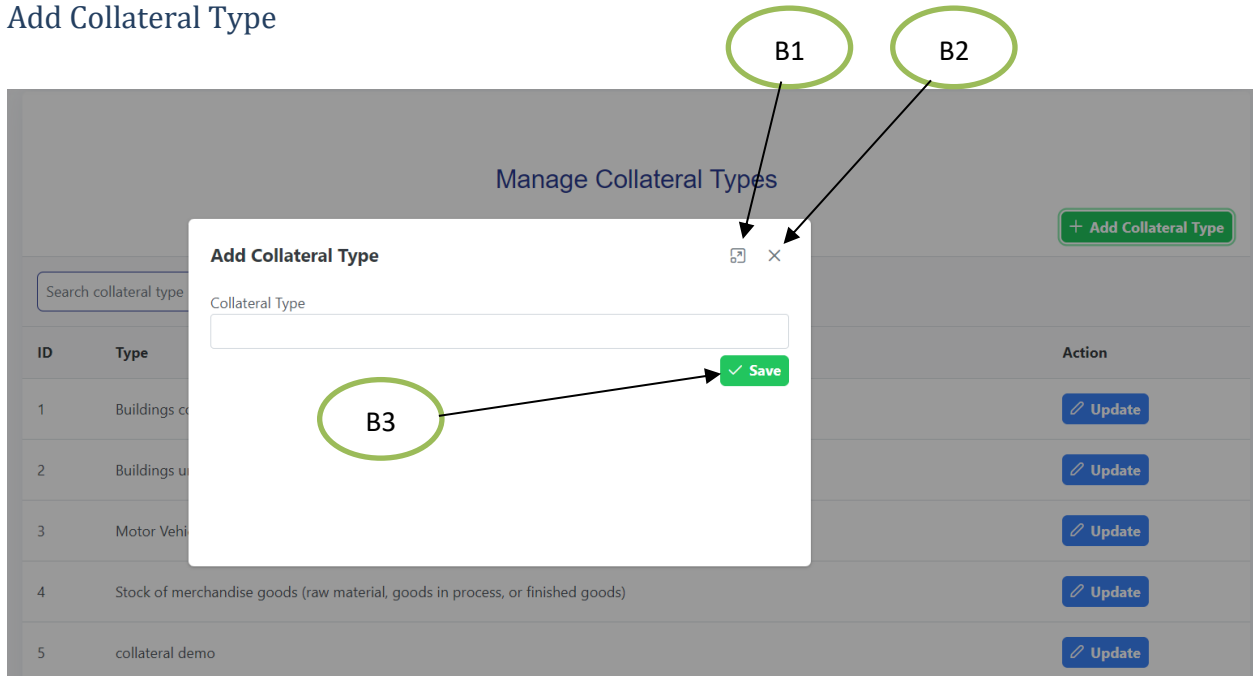


Figure 8: add collateral type

## Actions

- When you click on B1, the modal will be full screen.
- When you click on B2, the modal will close.
- Clicking on “Save” button pointed by B3, will add collateral type.

## Update Collateral Type

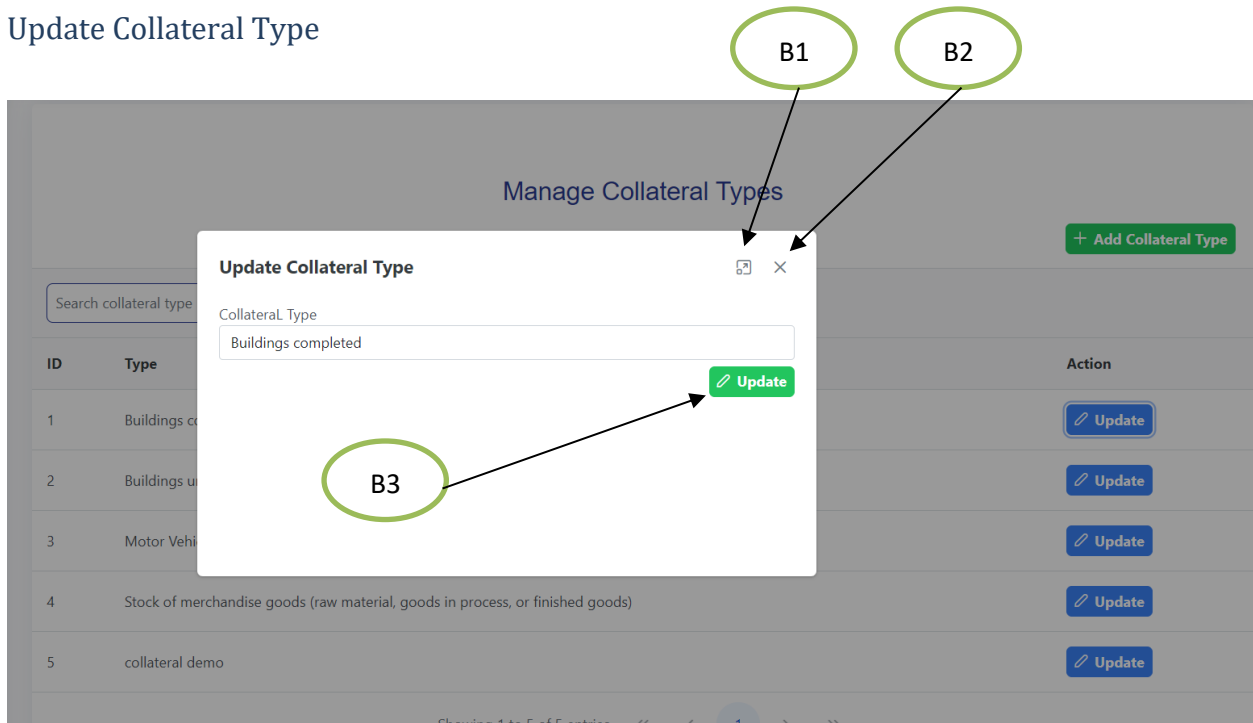


Figure 9: update collateral type

### Actions

- When you click on B1, the modal will be full screen.
- When you click on B2, the modal will close.
- Clicking on “Update” button pointed by B3, will update the selected collateral type.

## Guarantee Type

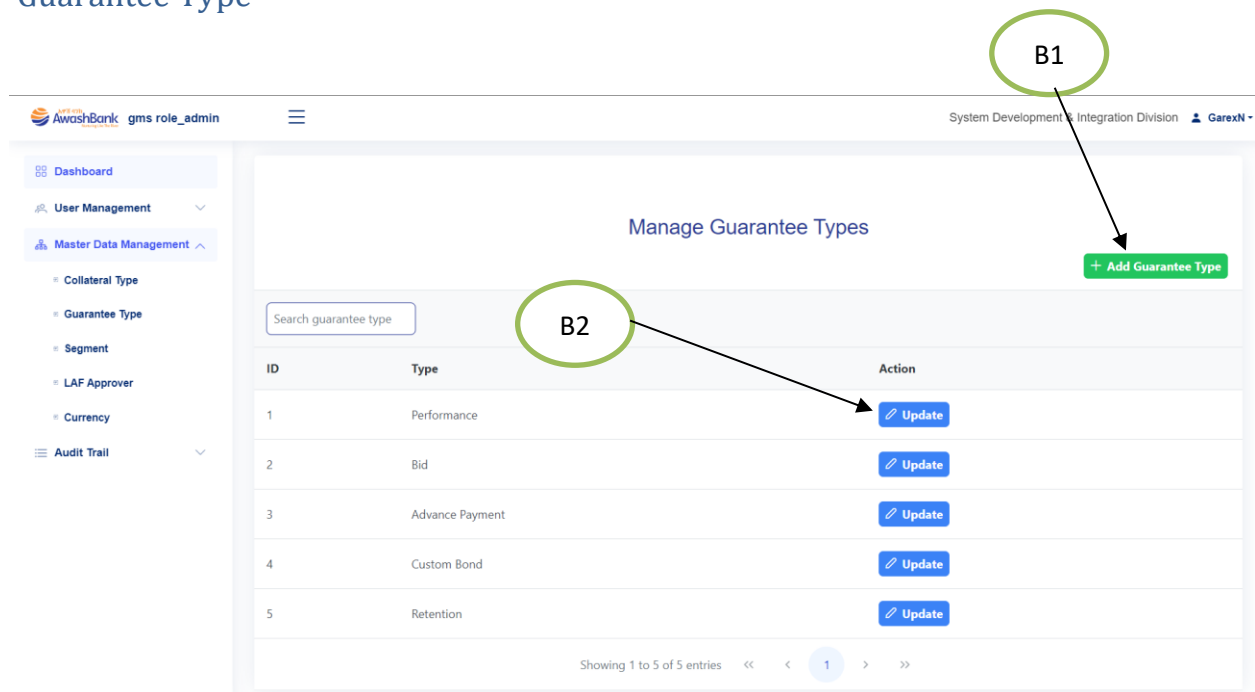


Figure 10: manage guarantee type

### Actions

- When you click on “Add Guarantee Type” button pointed by B1, a modal will pop up as shown in Figure 11.
- When you click on “Update” button pointed by B2, a modal will pop up as shown in Figure 12.

## Add Guarantee Type

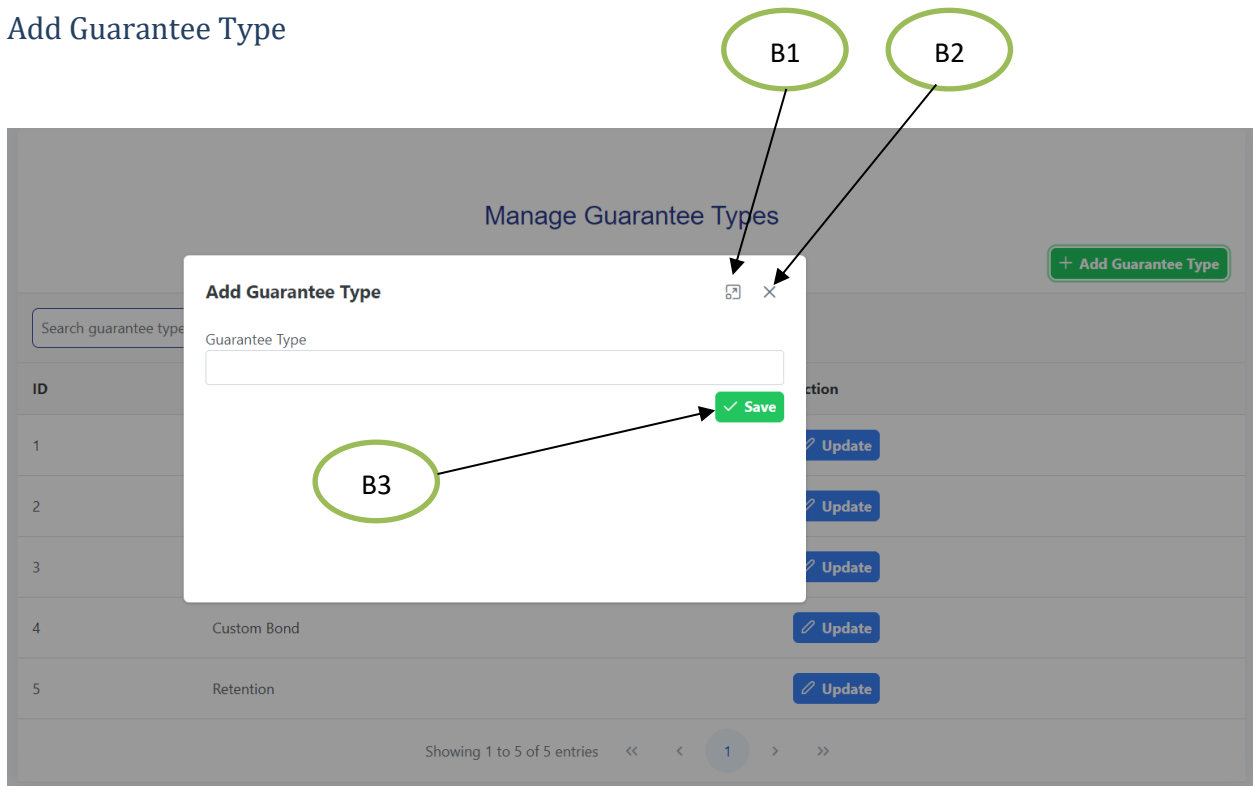


Figure 11: add guarantee type

### Actions

- When you click on B1, the modal will be full screen.
- When you click on B2, the modal will close.
- Clicking on "Save" button pointed by B3, will add guarantee type.

## Update Guarantee Type

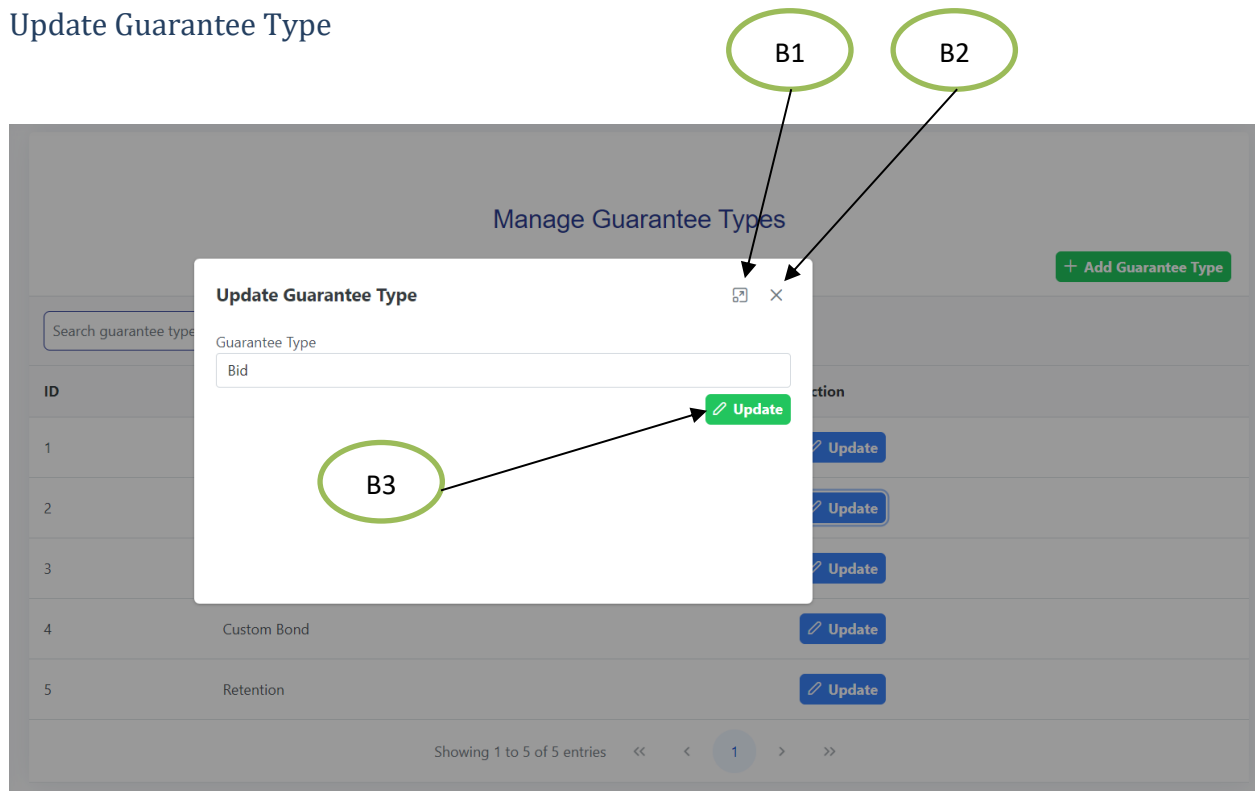


Figure 12: update guarantee type

### Actions

- When you click on B1, the modal will be full screen.
- When you click on B2, the modal will close.
- Clicking on “Update” button pointed by B3, will update the selected guarantee type.

# Segment

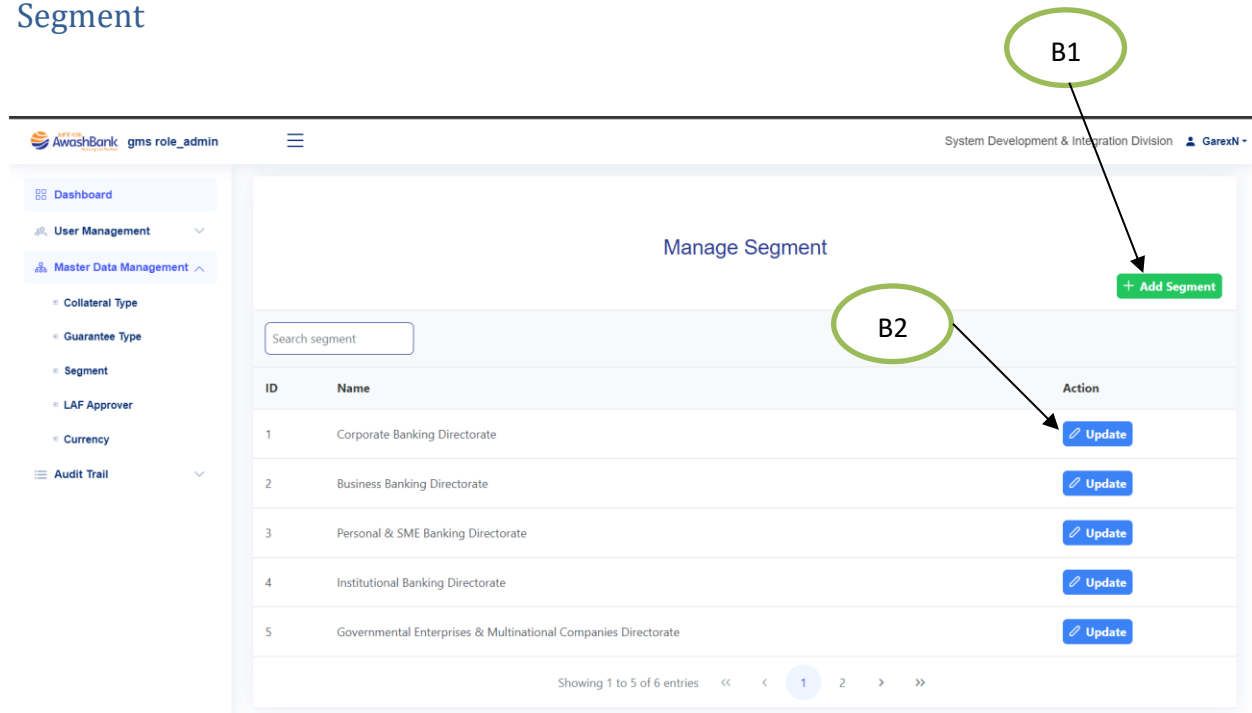


Figure 13: manage segment

## Actions

- When you click on “Add Segment” button pointed by B1, a modal will pop up as shown in Figure 14.
- When you click on “Update” button pointed by B2, a modal will pop up as shown in Figure 15.

## Add Segment

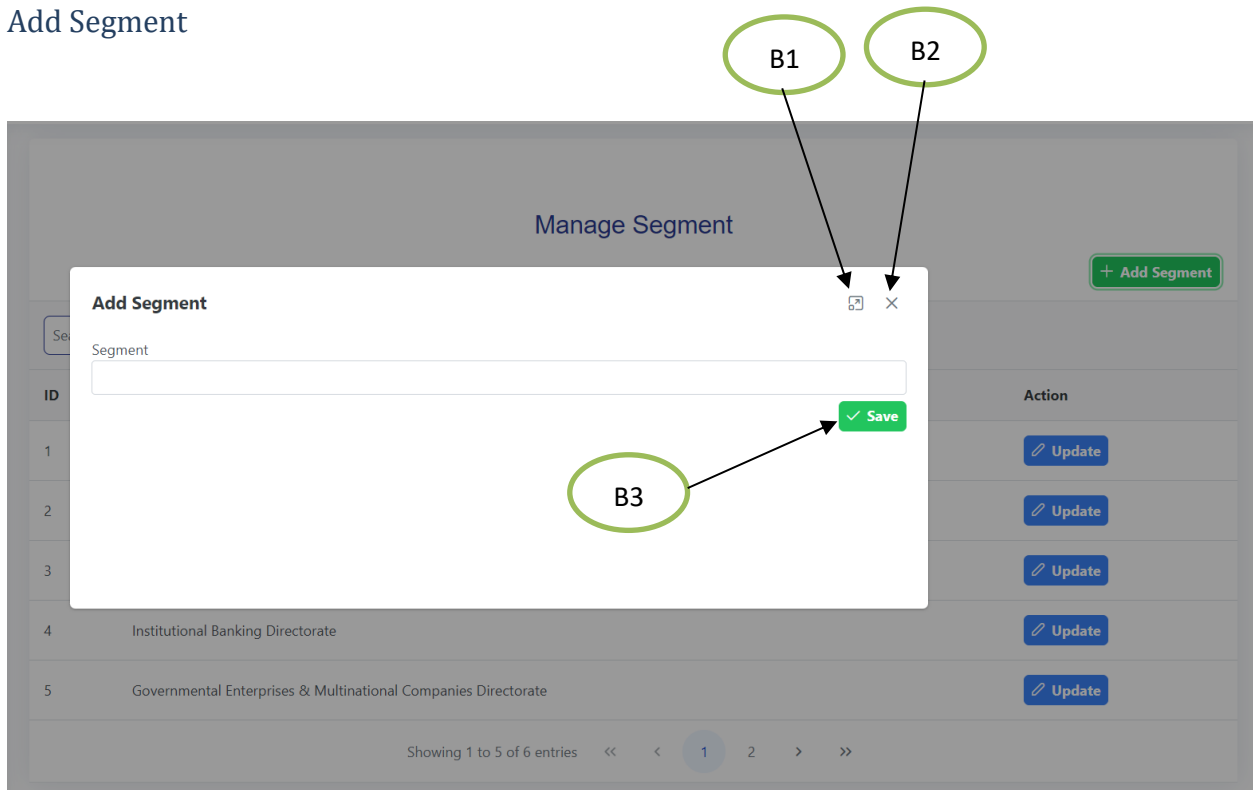


Figure 14: add segment

## Actions

- When you click on B1, the modal will be full screen.
- When you click on B2, the modal will close.
- Clicking on “Save” button pointed by B3, will add segment.



## Update Segment

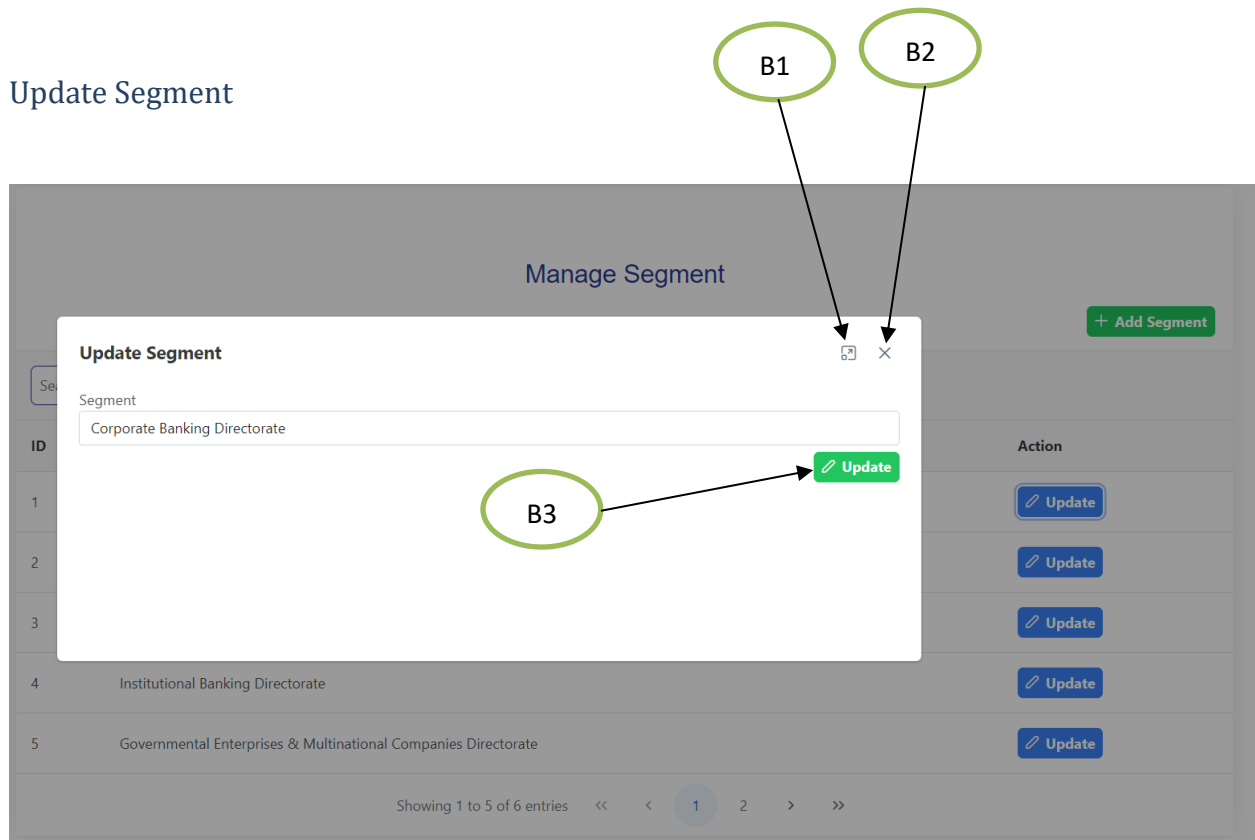


Figure 15: update segment

## Actions

- When you click on B1, the modal will be full screen.
- When you click on B2, the modal will close.
- Clicking on "Update" button pointed by B3, will update the selected segment.

## LAF Approver

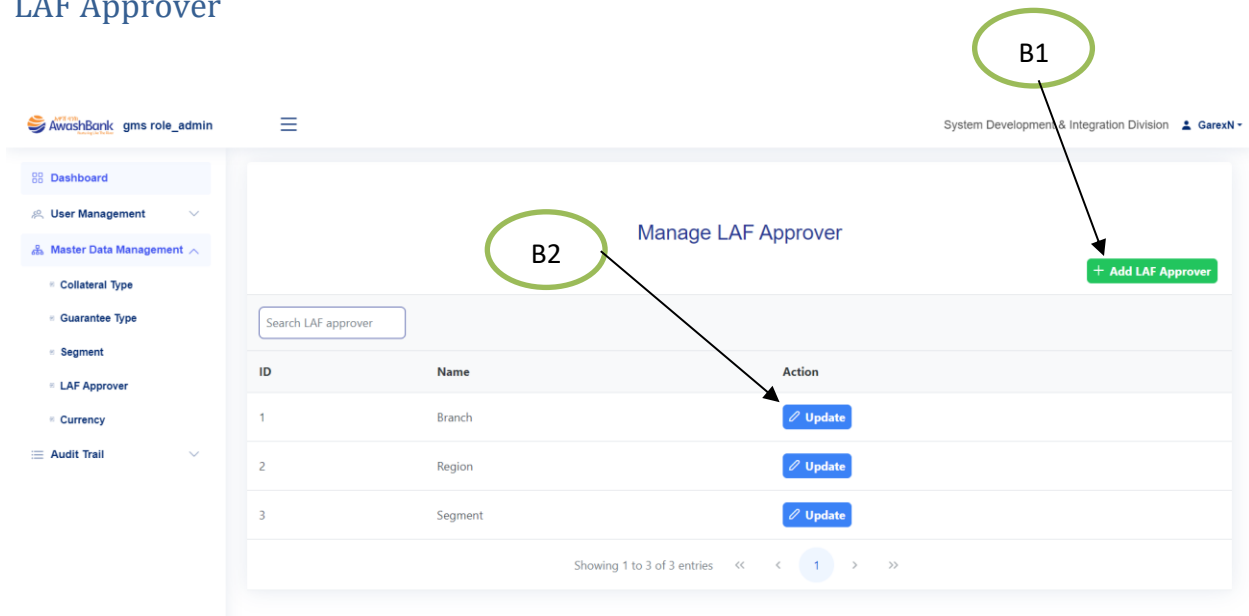


Figure 16: manage LAF approver

### Actions

- When you click on “Add LAF Approver” button pointed by B1, a modal will pop up as shown in Figure 17.
- When you click on “Update” button pointed by B2, a modal will pop up as shown in Figure 18.

## Add LAF Approver

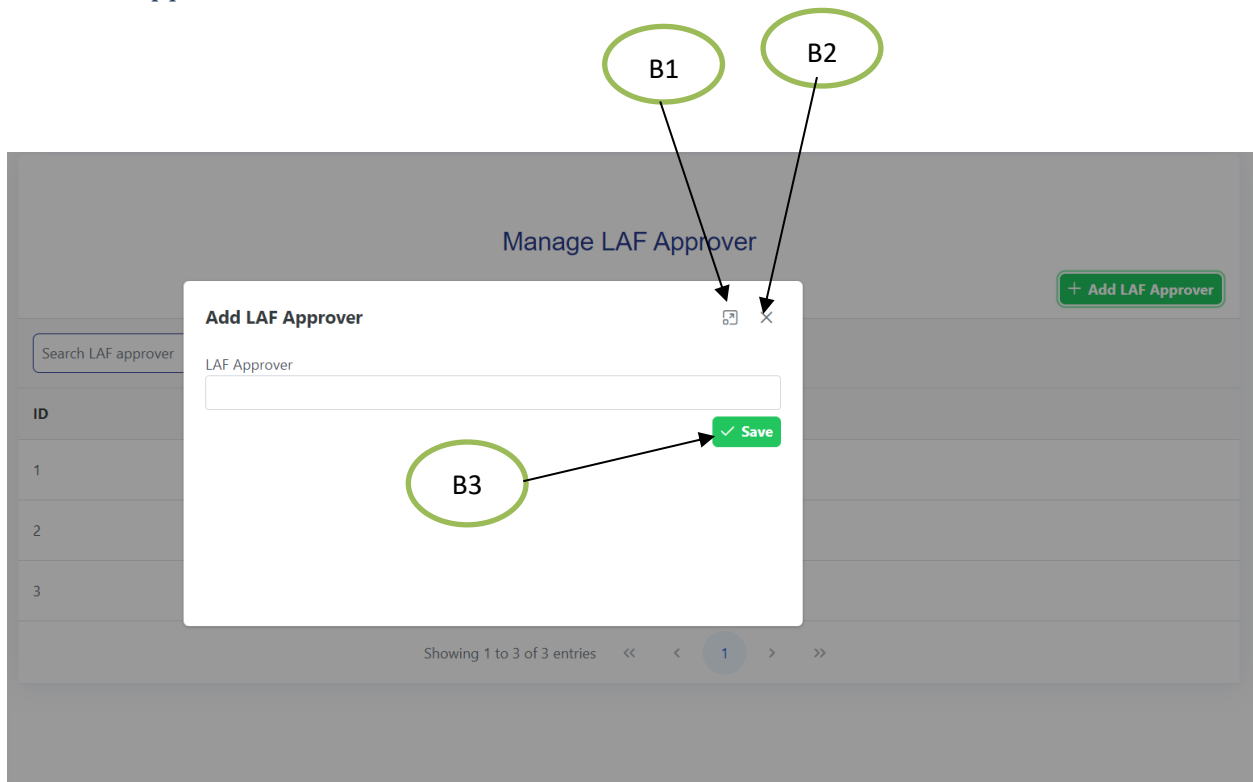


Figure 17: add LAF approver

### Actions

- When you click on B1, the modal will be full screen.
- When you click on B2, the modal will close.
- Clicking on “Save” button pointed by B3, will add LAF approver.

## Update LAF Approver

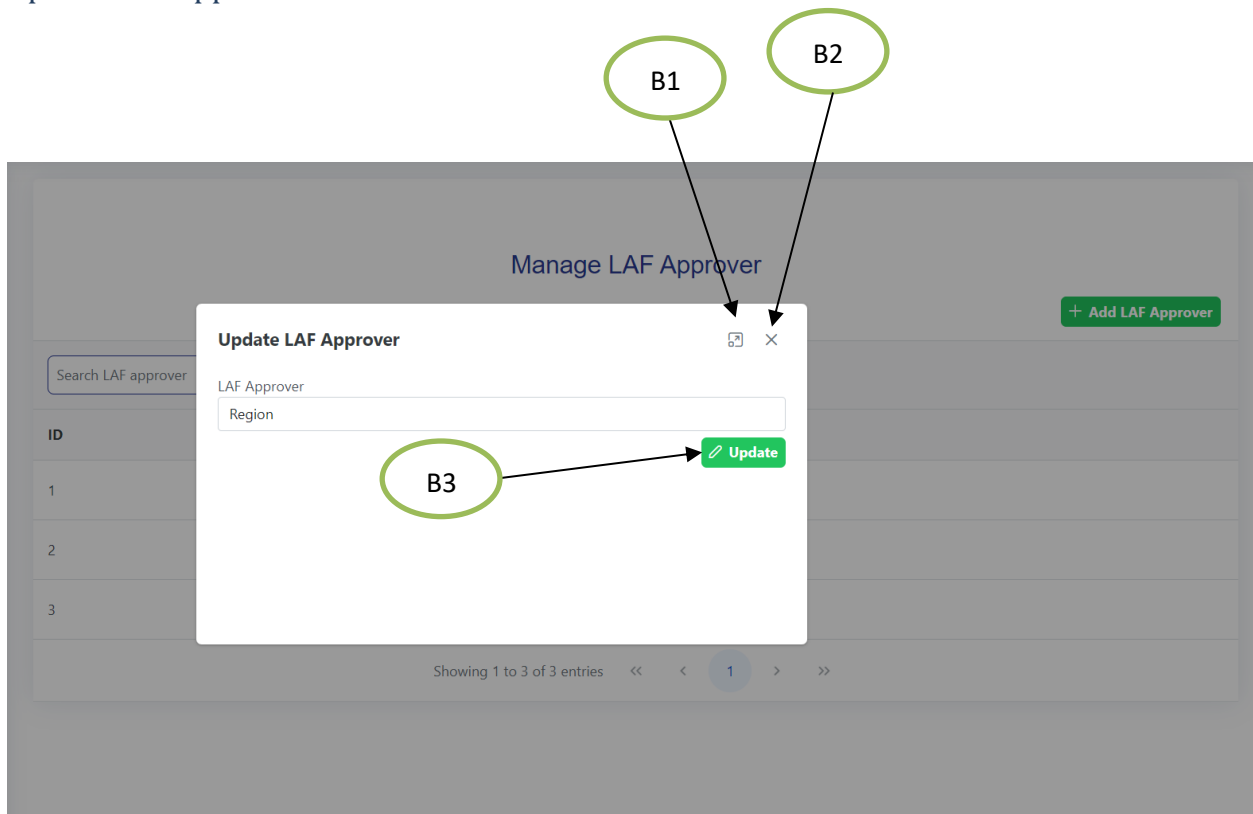


Figure 18: update LAF approver

### Actions

- When you click on B1, the modal will be full screen.
- When you click on B2, the modal will close.
- Clicking on “Update” button pointed by B3, will update the selected LAF approver.

# Currency

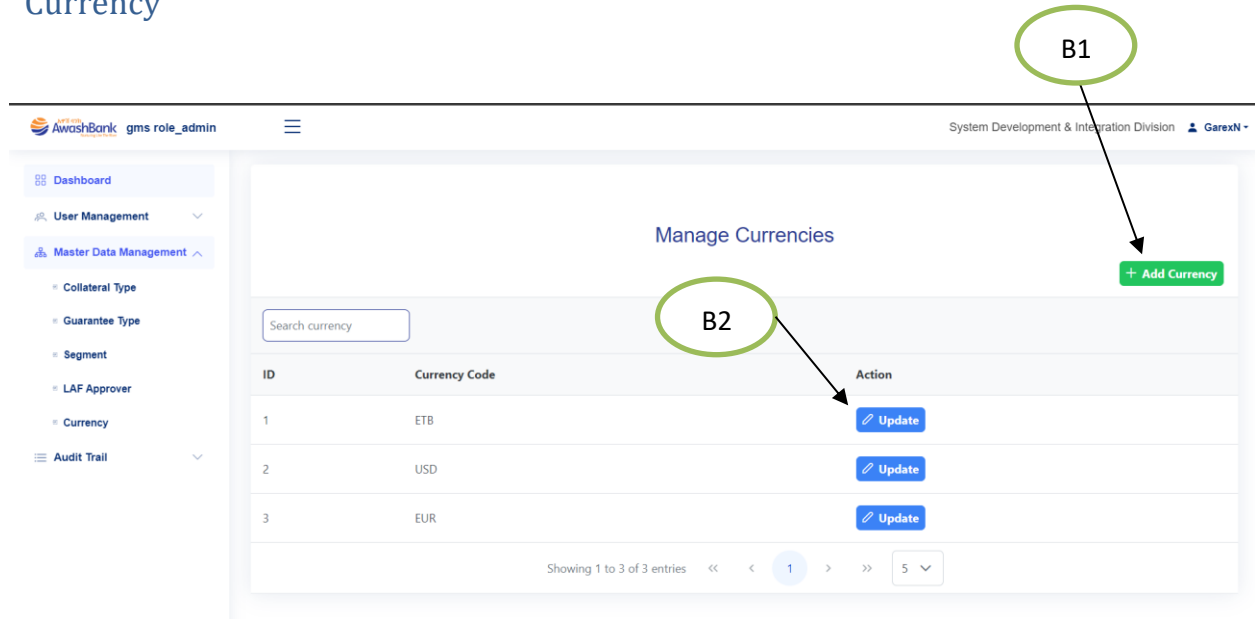


Figure 19: manage currency

## Actions

- When you click on “Add Currency” button pointed by B1, a modal will pop up as shown in Figure 20.
- When you click on “Update” button pointed by B2, a modal will pop up as shown in Figure 21.

## Add Currency

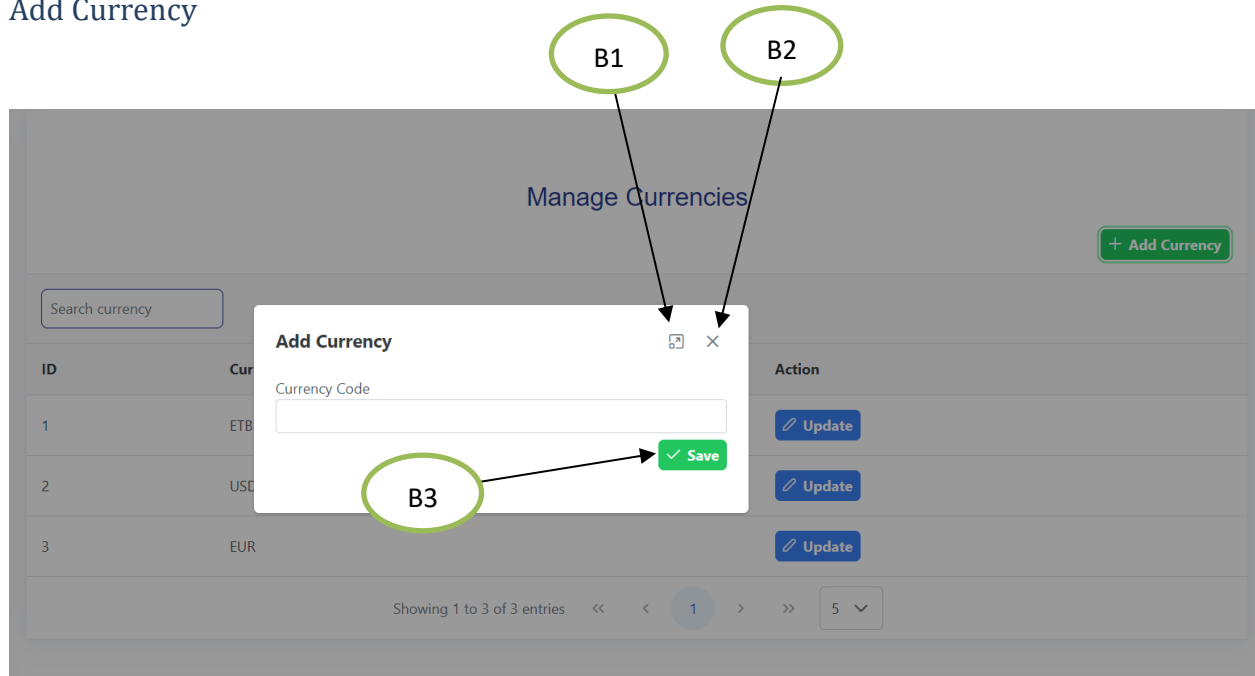


Figure 20: add currency

## Actions

- When you click on B1, the modal will be full screen.
- When you click on B2, the modal will close.
- Clicking on "Save" button pointed by B3, will add currency.

## Update Currency

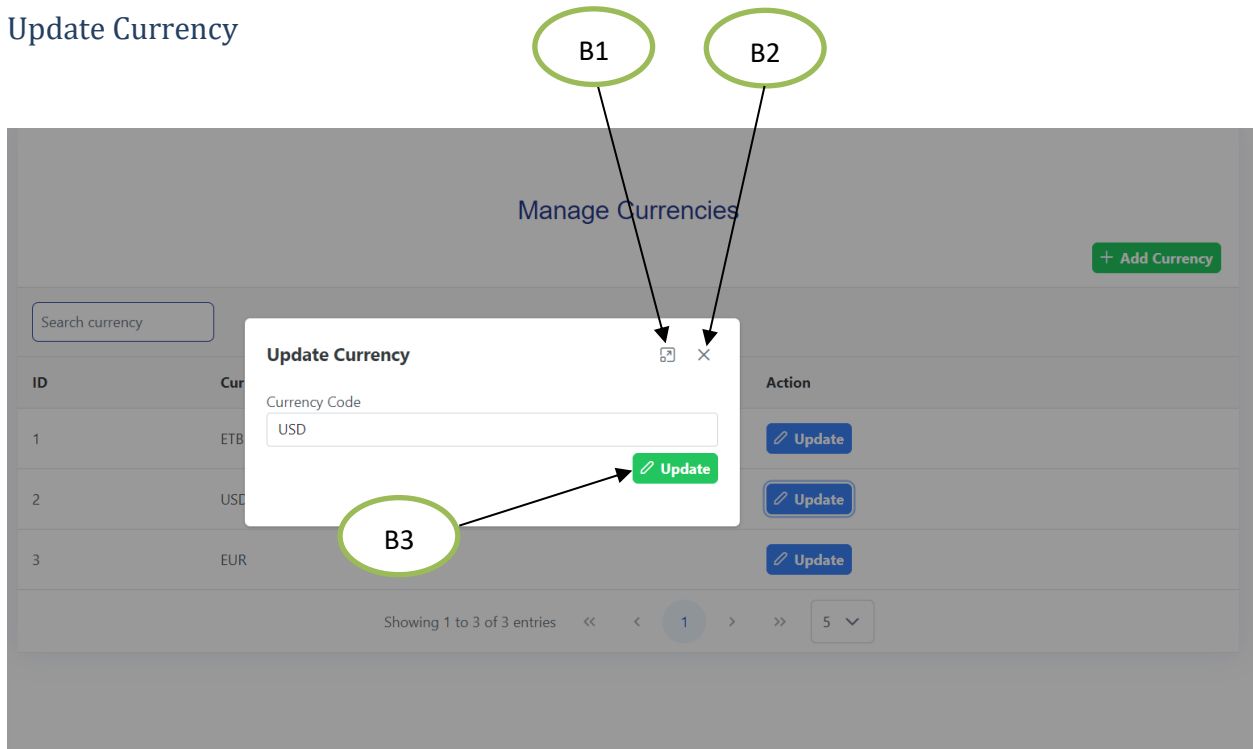


Figure 21: update currency

## Actions

- When you click on B1, the modal will be full screen.
- When you click on B2, the modal will close.
- Clicking on "Update" button pointed by B3, will update the selected currency.

# Audit Trail

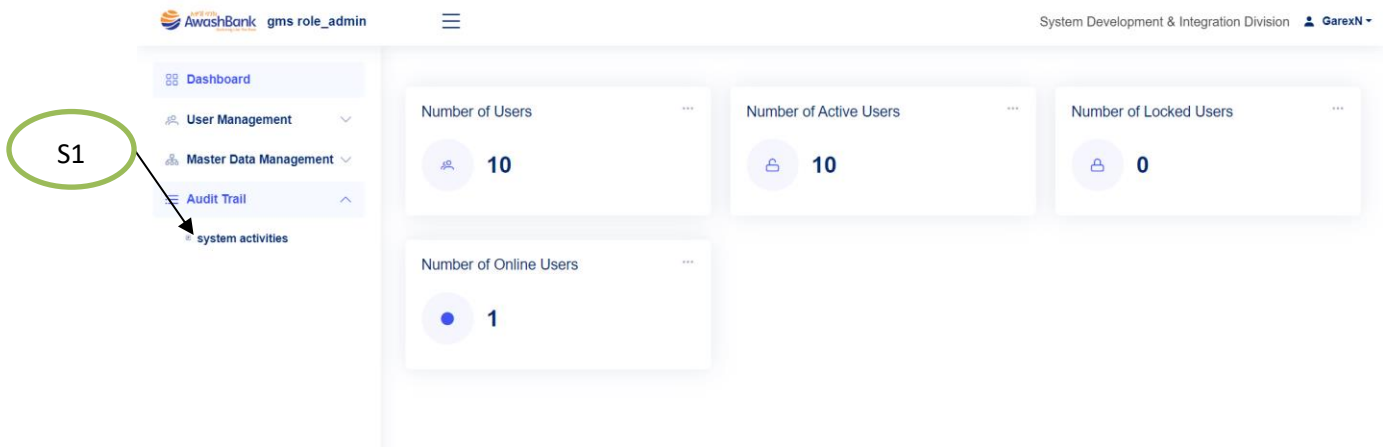


Figure 22: audit trail sub-menu

## Submenu

- Clicking on S1 will open a page as shown in Figure 23.

System Audit Trail			
<input type="text" value="Search"/>			
Username	Action	TimeStamp	Details
segmentMaker	Create	Apr 8, 2024, 3:33:03 PM	Limit Created with id: 8F77AA5A-41E1-4A04-A21C-FF30B88AFE45
segmentChecker	Approve	Mar 30, 2024, 11:27:41 AM	Guarantee with id: 738FE99F-41B6-4A4D-9E6A-BA7AAF85D361 approved for creation.
segmentMaker	Renew	Mar 30, 2024, 11:23:34 AM	Guarantee with id: 1303A055-4ADB-4034-8CA8-0924CA067216 is renewed with system status Renewed
segmentChecker	Approve	Mar 30, 2024, 11:03:06 AM	Guarantee with id: 91E1030F-D862-46BD-A95E-B5641F413C87 approved for update.
segmentMaker	Claim	Mar 30, 2024, 11:02:44 AM	Guarantee with id: 91E1030F-D862-46BD-A95E-B5641F413C87 is Claimed with system status Settled
Showing 1 to 5 of 207 entries << < 1 2 3 4 5 > >> 5 ▾			

Figure 23: system audit trail



## User

### Sign Out

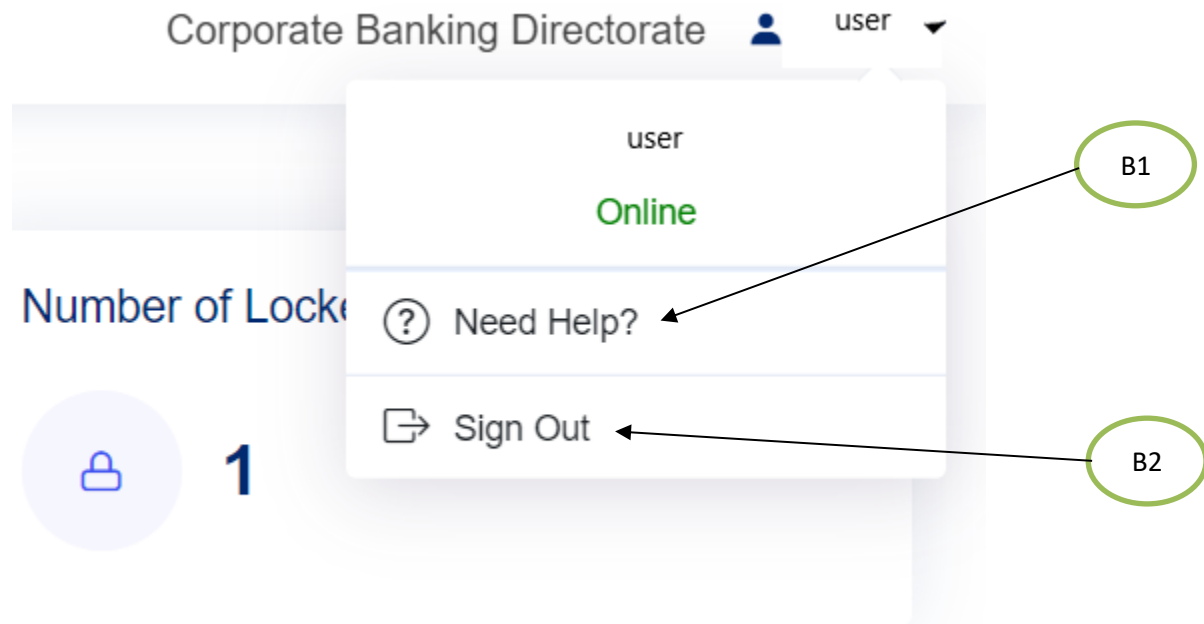


Figure 24: sign out

### Actions

- Clicking on the arrow next to the username will show a drop down as shown in Figure 24.
- Clicking on B1 will get you this user manual.
- You can sign out by clicking on B2.