



Regional User manual – Limit and Guarantee Report View

Guarantee Management System

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Introduction

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

Audience

This manual is intended for the following User Roles:

Role	Function
Regional User	Guarantee report, commission amount report and limit report view

User

- After you have successfully logged into Guarantee Management System as a regional user, the screen on (Figure 1) will be displayed.
- D1 shows logged in user role.
- D2 shows logged in user branch.
- D3 shows logged in user name.
- Click on the drop down arrow next to user name (B1) (Figure 1) which will drop a modal as shown in Figure 2.
- Click on “need help?” button (B1) (Figure 2) to get this user manual.
- Click on “sign out” button (B2) (Figure 2) to log out of this system.

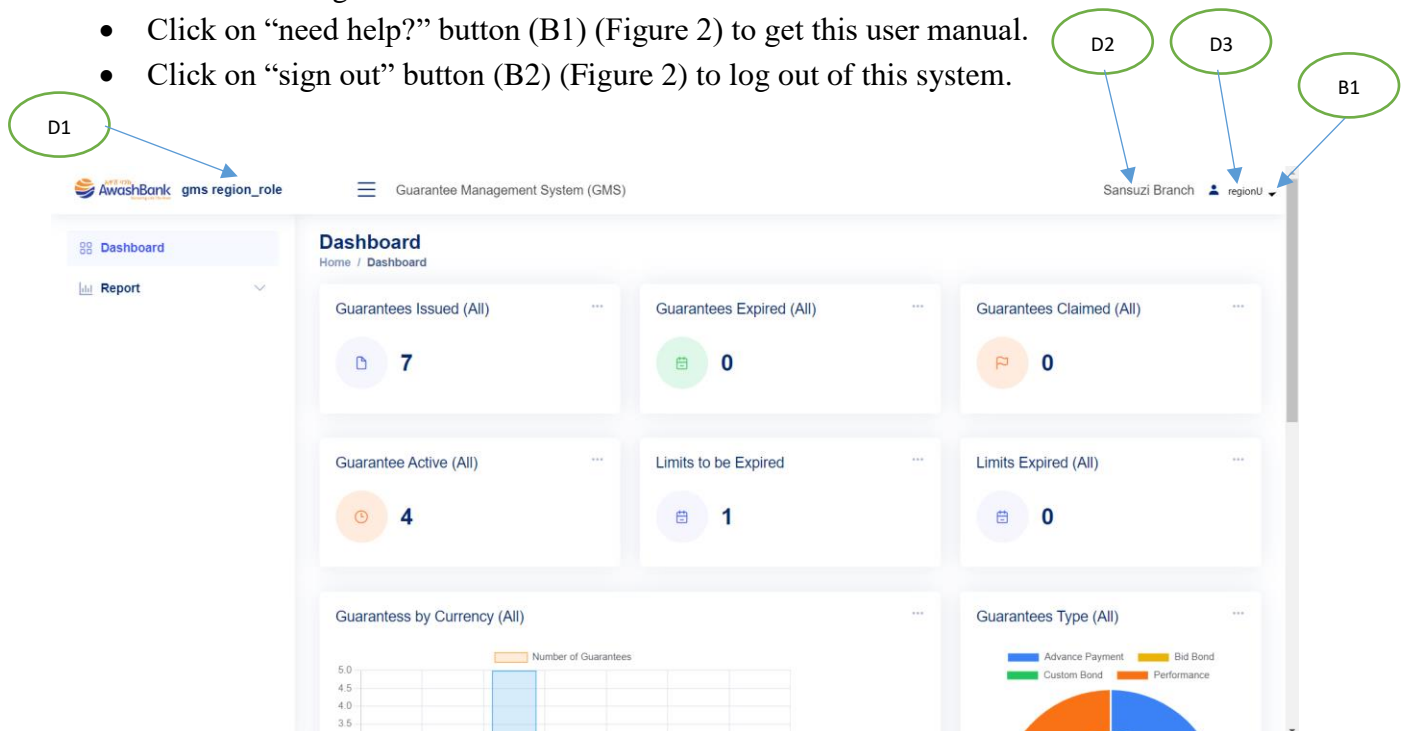


Figure 1: page after log in

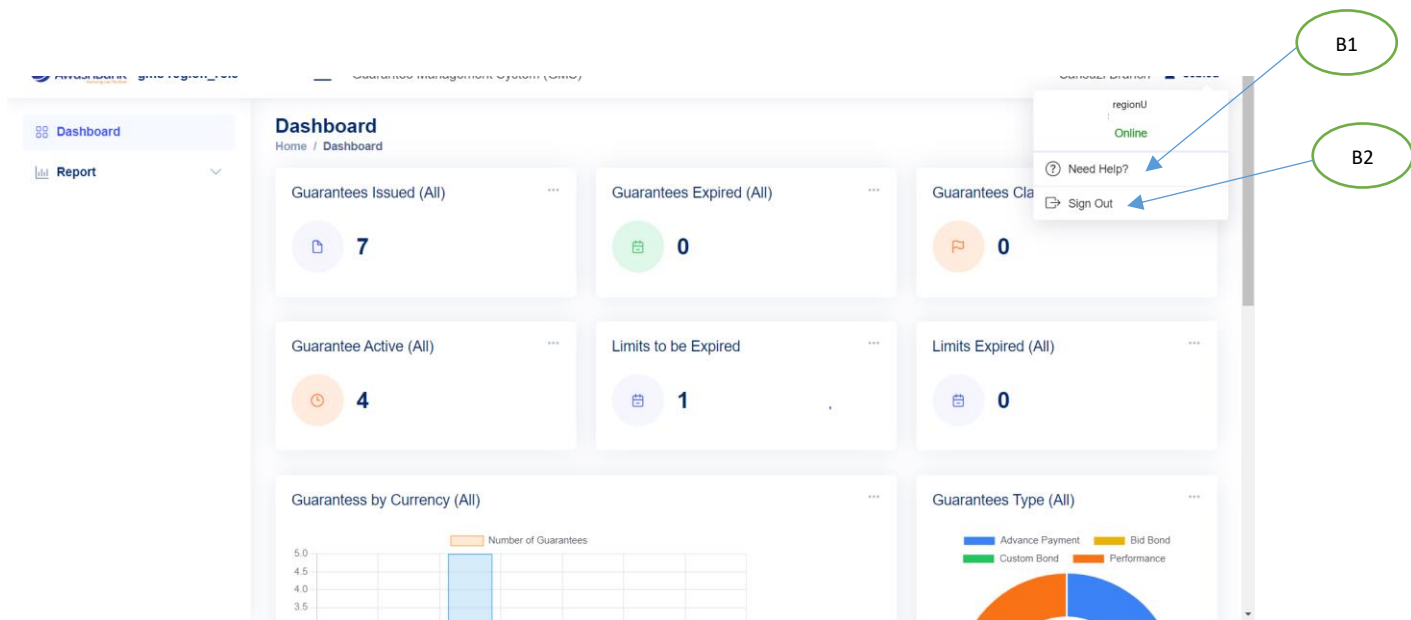


Figure 2: user actions

Dashboard

There are different charts on the dashboard page as shown in Figure 3. Scroll down to see other dashboard charts as shown in Figure 4 and Figure 5.

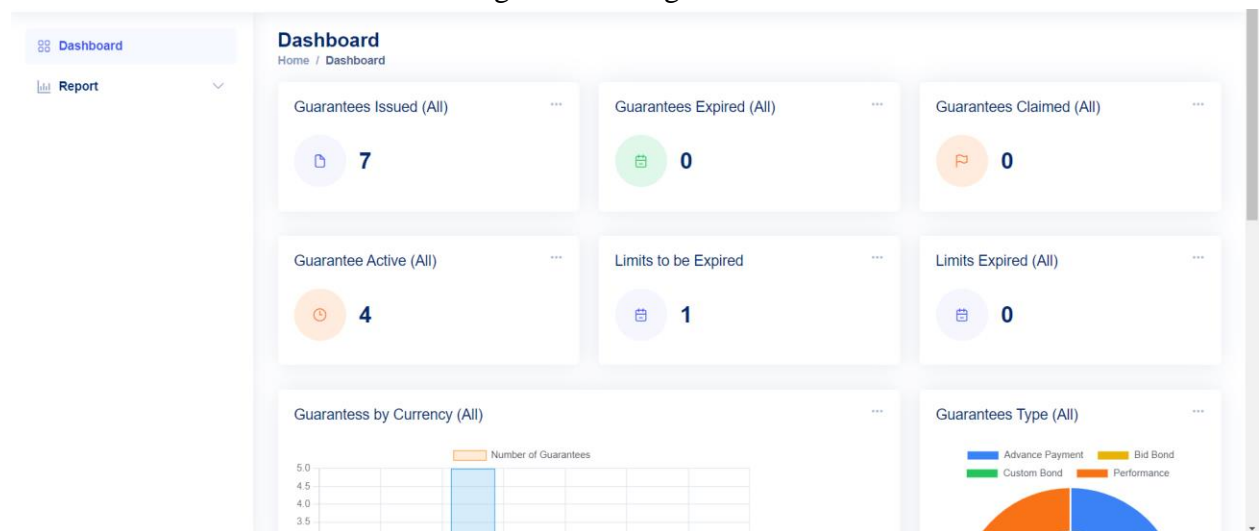


Figure 3: dashboard



Figure 4: dashboard cont. 2

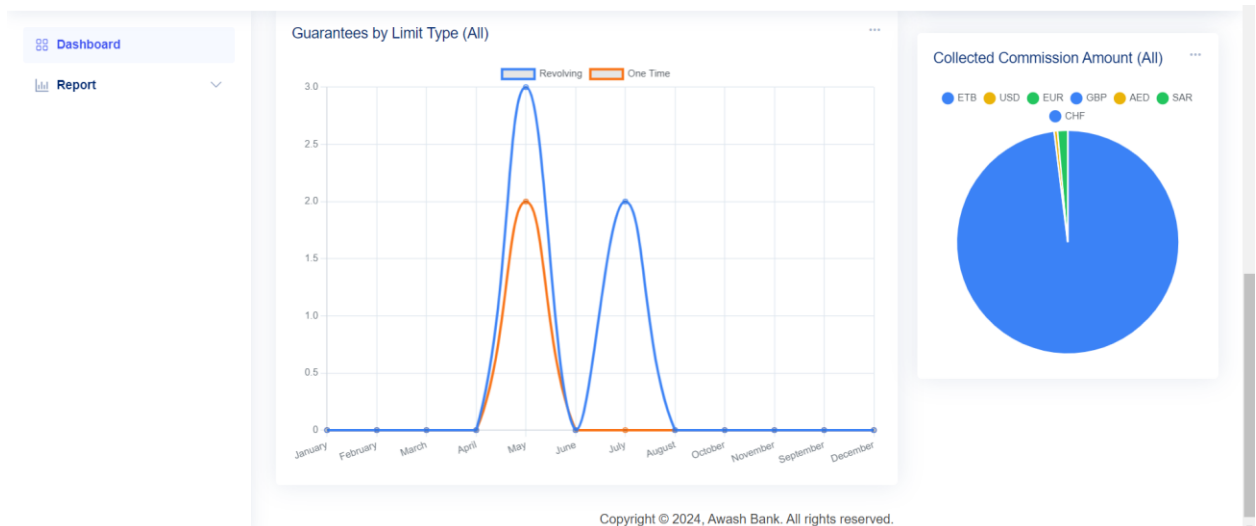


Figure 5: dashboard cont. 3

Report

Regional report:

- To view regional report, click on “regional report” sub-menu (M1) as shown in Figure 6.
- After that you will be redirected to a page as shown in Figure 7.
- You can load all report by clicking on the button “load all report” (B1) or apply filter by selecting from filter options then click on the button “apply filter” (B2) as shown in Figure 7.
- Selected filters will be displayed as shown in Figure 8(D1).
- To export report to excel, click on (B1) and to export to pdf, click on (B2) as shown in Figure 9.

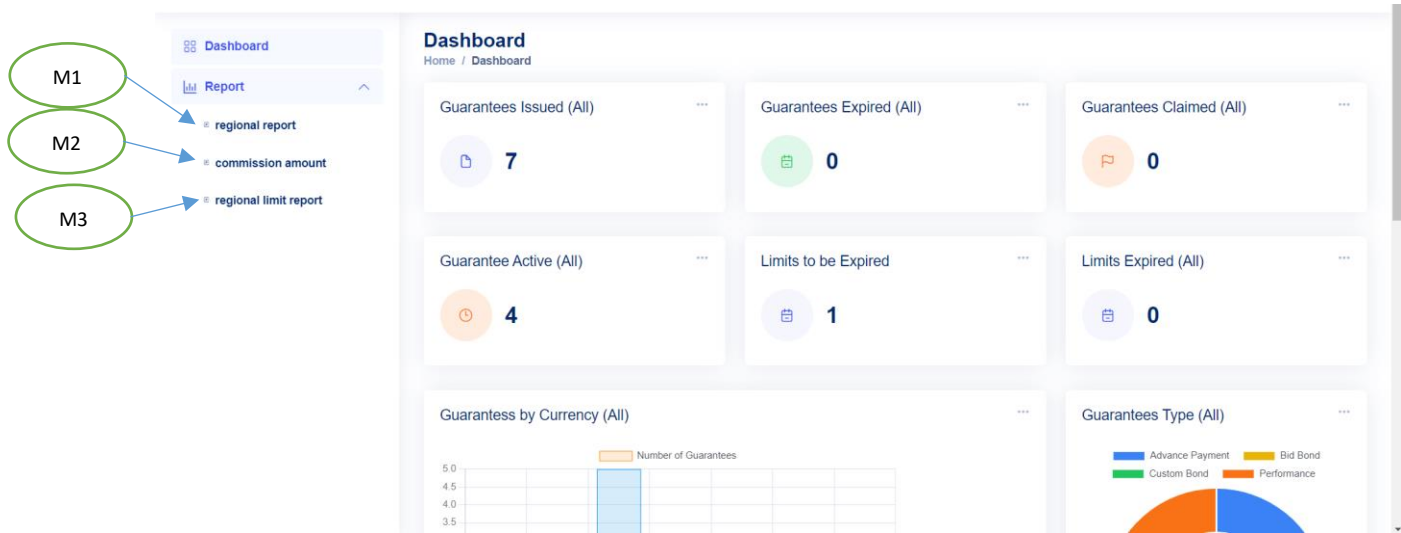


Figure 6: report sub-menu

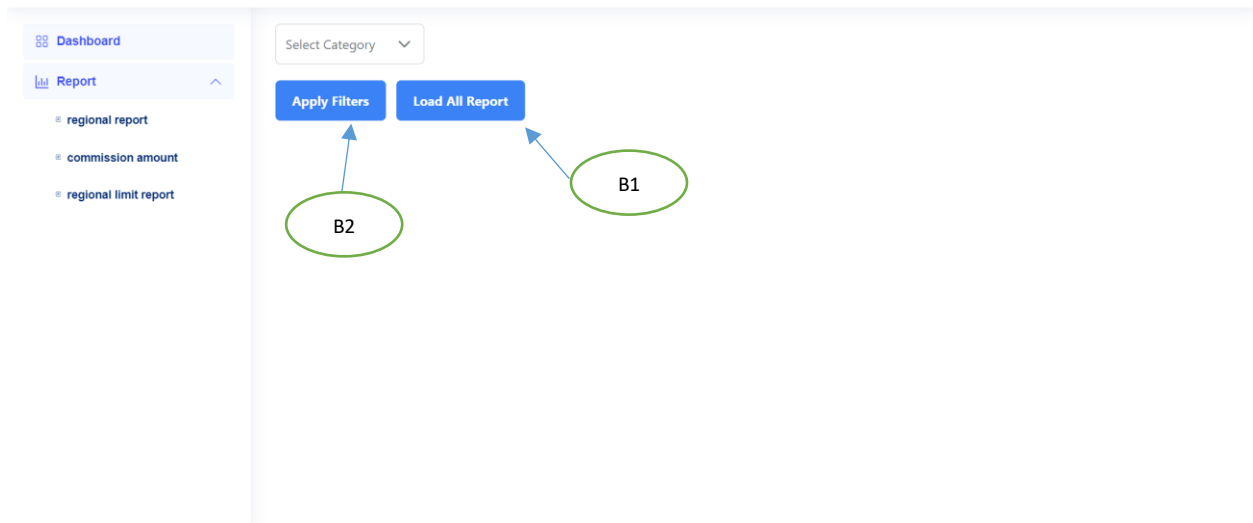


Figure 7: regional report

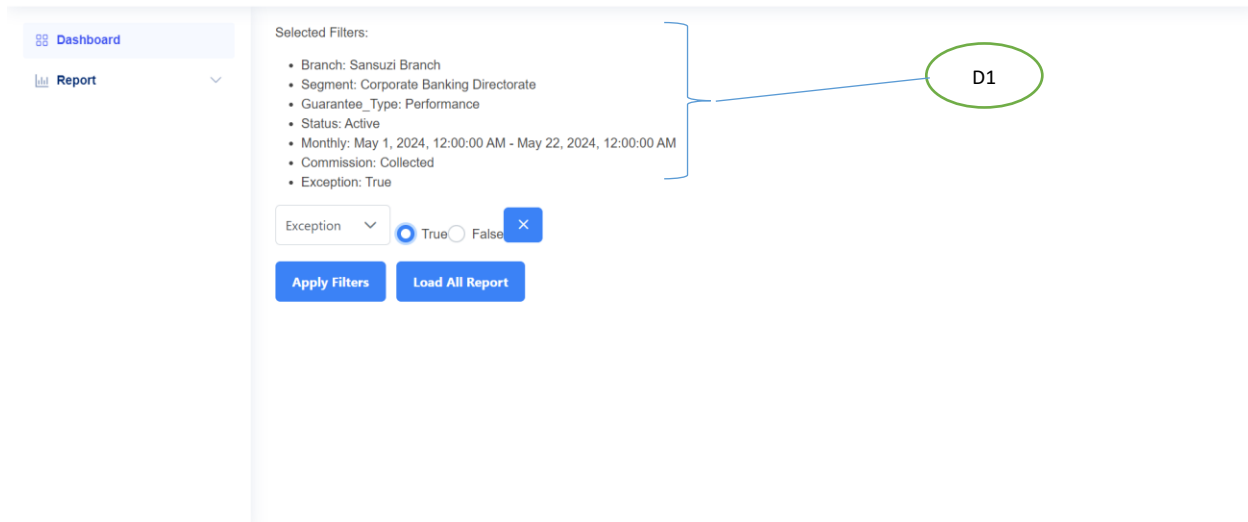


Figure 8: selected filters for regional report

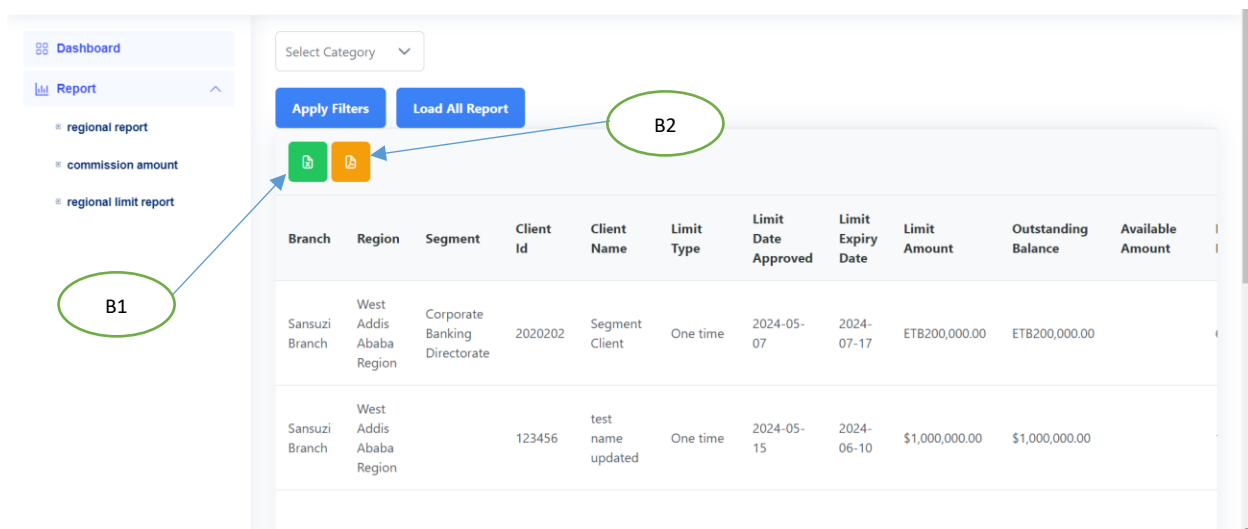


Figure 9: export report

Commission Amount Report:

- To view commission amount report, click on “commission amount” sub-menu (M2) as shown in Figure 6.
- After that you will be redirected to a page as shown in Figure 10.
- Click on “Load report” button (B1) as shown in Figure 10.
- You can select date range (B2) filter method which is optional as shown in Figure 10.
- To export the loaded report to excel, click on B1 (Figure 11).
- To export the loaded report to pdf, click on B2 (Figure 11).

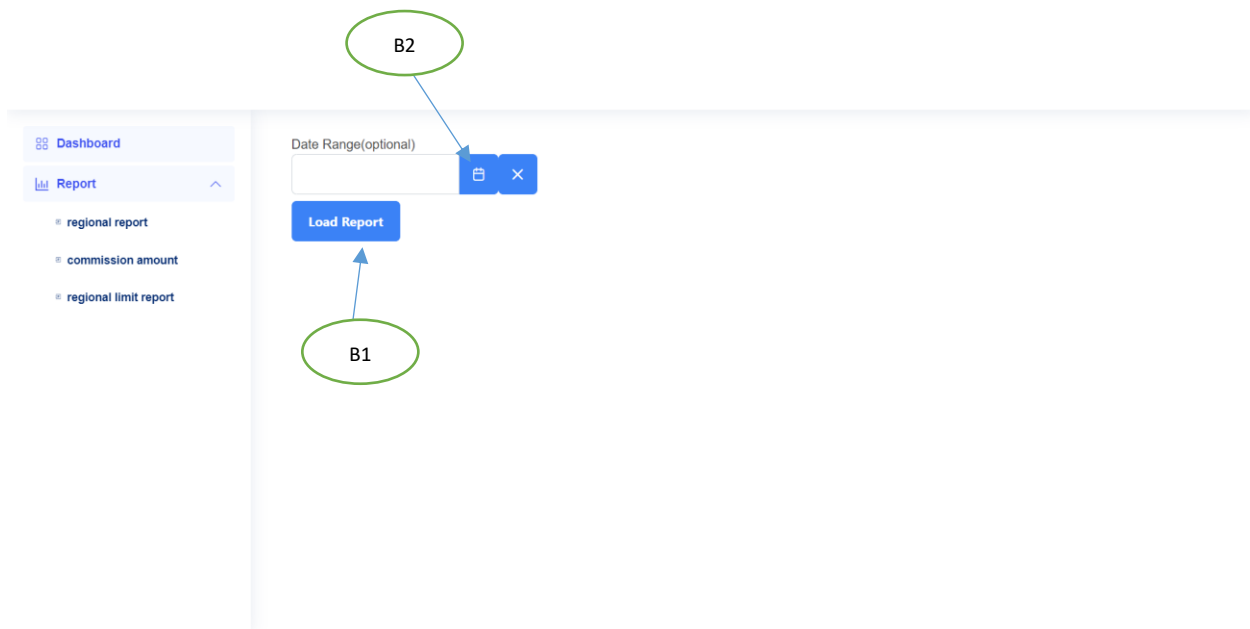


Figure 10: commission amount report

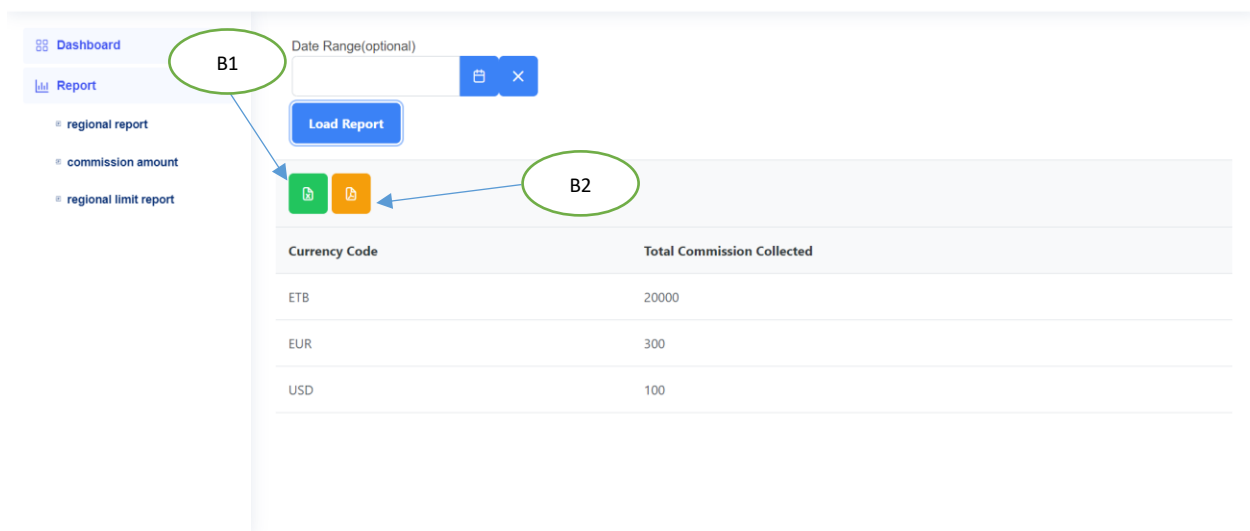


Figure 11: commission amount report export

Limit Report:

- To view limit report, click on “regional limit report” sub-menu (M3) as shown in Figure 6.
- After that you will be redirected to a page as shown in Figure 12.
- Click on “Load report” button (B1) as shown in Figure 12.
- You can select limit to expire (B2) or limit expired (B3) filter method which is optional as shown in Figure 12.
- To export the loaded report to excel, click on B1 (Figure 13).
- To export the loaded report to pdf, click on B2 (Figure 13).

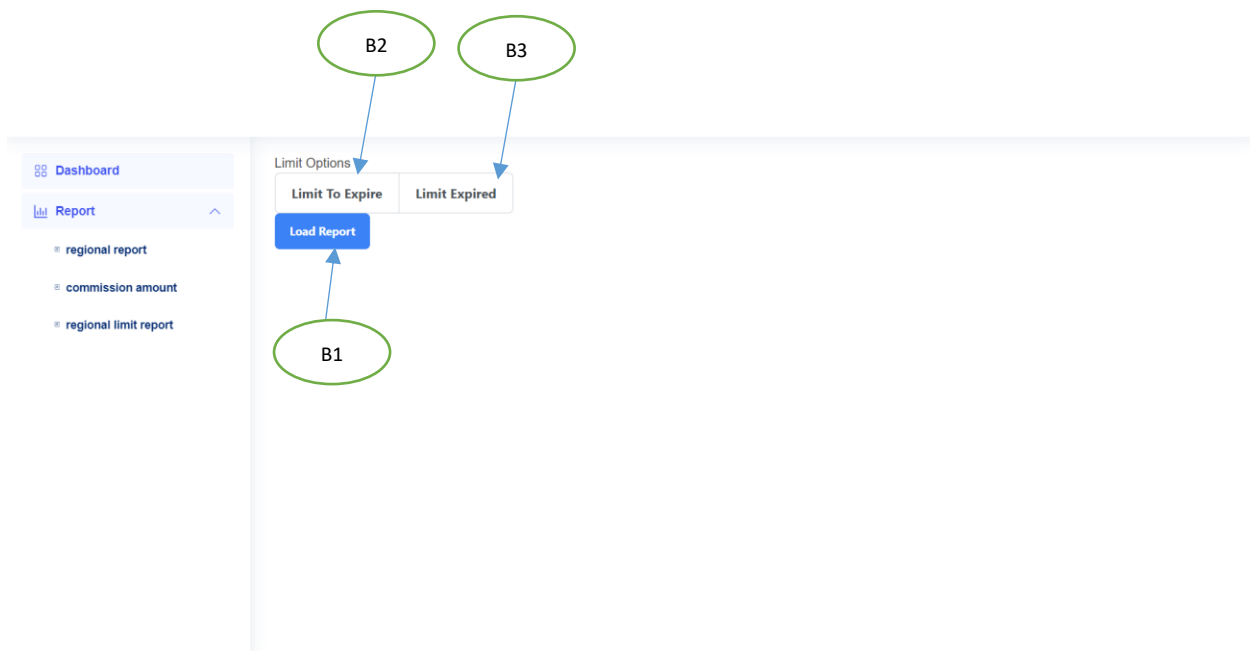


Figure 12: regional limit report

LAF Number	Date Approved	Date Expired	Number of Days Left	Limit Type	Branch	Region	Segment	LAF Approver Organ	Client ID	Client Name	Limi Amc
AB/BB/222/2024	2024-05-14	2024-07-24	63	Revolving	Sansuzi Branch	West Addis Ababa Region	Corporate Banking Directorate		2222222	segment client name	2000
5656565	2024-05-07	2024-07-17	56	One time	Sansuzi Branch	West Addis Ababa Region	Corporate Banking Directorate		2020202	Segment Client	2000
	2024-05-07	2024-07-17			Sansuzi Branch	West Addis Ababa Region	Corporate Banking Directorate			test	

Figure 13: limit report export