**Technical**

**MANUAL**

*Bank Admin System*

November 2018

**Revision Sheet**

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| --- | --- | --- |
| **Release No.** | **Date** | **Revision Description** |
| Rev. 0 | 11/28/2018 | User’s Manual Template and Checklist |
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# GETTING STARTED

## 3.1 Logging In

An ID and password is required to log onto web interface.

## 3.2 System Menu

### 3.2.1 Bank Administration Index

Provide a system function linking to different table administrations including functions below:

Account Admin

Branch Admin

Charge Plan Admin

Client Admin

Employee Admin

Service Admin

Transaction Admin

Bill Admin

Client Log in Admin

Employee Log in Admin

Clicking on links to get into desired admin part.

## 3.3 Account Admin

### Account Search

Click on drop-down menu Choose Search Type, select desired search type.

Click on drop-down menu Choose Search Type, select desired search type.

Click on Enter Search Term input box, input keyword.

Click submit button Search.

If no input in the Enter Search Term input box, system will show all accounts of the bank.

### Insert Bank Account Information

Input keywords into input boxs select all the other data, and click the submit button Add New Account.

### Upadate Bank Account Information

Input keywords into account\_id, select and input all the other data, and click the submit button Update Account Informaiton.

### Delete Bank Account INformaiton

Input the keywords into input box account\_id, and click the submit button Delete Branch Information.

## 3.4 Branch Admin

### Branch Search

Click on drop-down menu Choose Search Type, select desired search type.

Click on drop-down menu Choose Search Type, select desired search type.

Click on Enter Search Term input box, input keyword.

Click submit button Search.

If no input in the Enter Search Term input box, system will show all branchs of the bank.

### Insert Bank Branch Information

Input keywords into input boxs select all the other data, and click the submit button Add New Branch.

### Upadate Bank Branch Information

Input keywords into branch\_id, select and input all the other data, and click the submit button Update Branch Informaiton.

### Delete Bank Branch Informaiton

Input the keywords into input box branch\_id, and click the submit button Delete Branch Information.

## 3.5 Charge Plan Admin

### Charge Plan Search

Click on drop-down menu Choose Search Type, select desired search type.

Click on drop-down menu Choose Search Type, select desired search type.

Click on Enter Search Term input box, input keyword.

Click submit button Search.

If no input in the Enter Search Term input box, system will show all Charge Plans of the bank.

### Insert Bank Charge Plan Information

Input keywords into input boxs select all the other data, and click the submit button Add New Charge Plan.

### Upadate Bank Charge Plan Information

Input keywords into Charge Plan\_id, select and input all the other data, and click the submit button Update Charge Plan Informaiton.

### Delete Bank Charge Plan Informaiton

Input the keywords into input box Charge Plan\_id, and click the submit button Delete Charge Plan Information.

## 3.6 Client Admin

### Client Search

Click on drop-down menu Choose Search Type, select desired search type.

Click on drop-down menu Choose Search Type, select desired search type.

Click on Enter Search Term input box, input keyword.

Click submit button Search.

If no input in the Enter Search Term input box, system will show all Clients of the bank.

### Insert Bank Client Information

Input keywords into input boxs select all the other data, and click the submit button Add New Client.

### Upadate Bank Client Information

Input keywords into Client\_id, select and input all the other data, and click the submit button Update Client Informaiton.

### Delete Bank Client Informaiton

Input the keywords into input box Client\_id, and click the submit button Delete Client Information.

## 3.7 Employee Admin

### Employee Search

Click on drop-down menu Choose Search Type, select desired search type.

Click on drop-down menu Choose Search Type, select desired search type.

Click on Enter Search Term input box, input keyword.

Click submit button Search.

If no input in the Enter Search Term input box, system will show all Employees of the bank.

### Insert Bank Employee Information

Input keywords into input boxs select all the other data, and click the submit button Add New Employee.

### Upadate Bank Employee Information

Input keywords into Employee\_id, select and input all the other data, and click the submit button Update Employee Informaiton.

### Delete Bank Employee Informaiton

Input the keywords into input box Employee\_id, and click the submit button Delete Employee Information.

## 3.8 Branch Admin

### Service Search

Click on drop-down menu Choose Search Type, select desired search type.

Click on drop-down menu Choose Search Type, select desired search type.

Click on Enter Search Term input box, input keyword.

Click submit button Search.

If no input in the Enter Search Term input box, system will show all Services of the bank.

### Insert Bank Service Information

Input keywords into input boxs select all the other data, and click the submit button Add New Service.

### Upadate Bank Service Information

Input keywords into Service\_id, select and input all the other data, and click the submit button Update Service Informaiton.

### Delete Bank Service Informaiton

Input the keywords into input box Service\_id, and click the submit button Delete Service Information.

## 3.9 Transaction Admin

### Transaction Search

Click on drop-down menu Choose Search Type, select desired search type.

Click on drop-down menu Choose Search Type, select desired search type.

Click on Enter Search Term input box, input keyword.

Click submit button Search.

If no input in the Enter Search Term input box, system will show all Transactions of the bank.

### Insert Bank Transaction Information

Input keywords into input boxs select all the other data, and click the submit button Add New Transaction.

### Upadate Bank Transaction Information

Input keywords into Transaction\_id, select and input all the other data, and click the submit button Update Transaction Informaiton.

### Delete Bank Transaction Informaiton

Input the keywords into input box Transaction\_id, and click the submit button Delete Transaction Information.

## 3.10 Bill Admin

### Bill Search

Click on drop-down menu Choose Search Type, select desired search type.

Click on drop-down menu Choose Search Type, select desired search type.

Click on Enter Search Term input box, input keyword.

Click submit button Search.

If no input in the Enter Search Term input box, system will show all Bills of the bank.

### Insert Bank Bill Information

Input keywords into input boxs select all the other data, and click the submit button Add New Bill.

### Upadate Bank Bill Information

Input keywords into Bill\_id, select and input all the other data, and click the submit button Update Bill Informaiton.

### Delete Bank Bill Informaiton

Input the keywords into input box Bill\_id, and click the submit button Delete Bill Information.

## 3.11 ClientLogin Admin

### ClientLogin Search

Click on drop-down menu Choose Search Type, select desired search type.

Click on drop-down menu Choose Search Type, select desired search type.

Click on Enter Search Term input box, input keyword.

Click submit button Search.

If no input in the Enter Search Term input box, system will show all ClientLogins of the bank.

### Insert Bank ClientLogin Information

Input keywords into input boxs select all the other data, and click the submit button Add New ClientLogin.

### Upadate Bank ClientLogin Information

Input keywords into Client\_id, select and input all the other data, and click the submit button Update ClientLogin Informaiton.

### Delete Bank ClientLogin Informaiton

Input the keywords into input box Client\_id, and click the submit button Delete ClientLogin Information.

## 3.12 EmployeeLogin Admin

### EmployeeLogin Search

Click on drop-down menu Choose Search Type, select desired search type.

Click on drop-down menu Choose Search Type, select desired search type.

Click on Enter Search Term input box, input keyword.

Click submit button Search.

If no input in the Enter Search Term input box, system will show all EmployeeLogins of the bank.

### Insert Bank EmployeeLogin Information

Input keywords into input boxs select all the other data, and click the submit button Add New EmployeeLogin.

### Upadate Bank EmployeeLogin Information

Input keywords into Employee\_id, select and input all the other data, and click the submit button Update EmployeeLogin Informaiton.

### Delete Bank EmployeeLogin Informaiton

Input the keywords into input box Employee\_id, and click the submit button Delete EmployeeLogin Information.

## 3.12 Schedule Admin

### Schedule Search

Click on drop-down menu Choose Search Type, select desired search type.

Click on drop-down menu Choose Search Type, select desired search type.

Click on Enter Search Term input box, input keyword.

Click submit button Search.

If no input in the Enter Search Term input box, system will show all Schedules of the bank.

### Insert Bank Schedule Information

Input keywords into input boxs select all the other data, and click the submit button Add New Schedule.

### Upadate Bank Schedule Information

Input keywords into Employee\_id, select and input all the other data, and click the submit button Update Schedule Informaiton.

### Delete Bank Schedule Informaiton

Input the keywords into input box Employee\_id, and click the submit button Delete Schedule Information.