#	Manual

Login

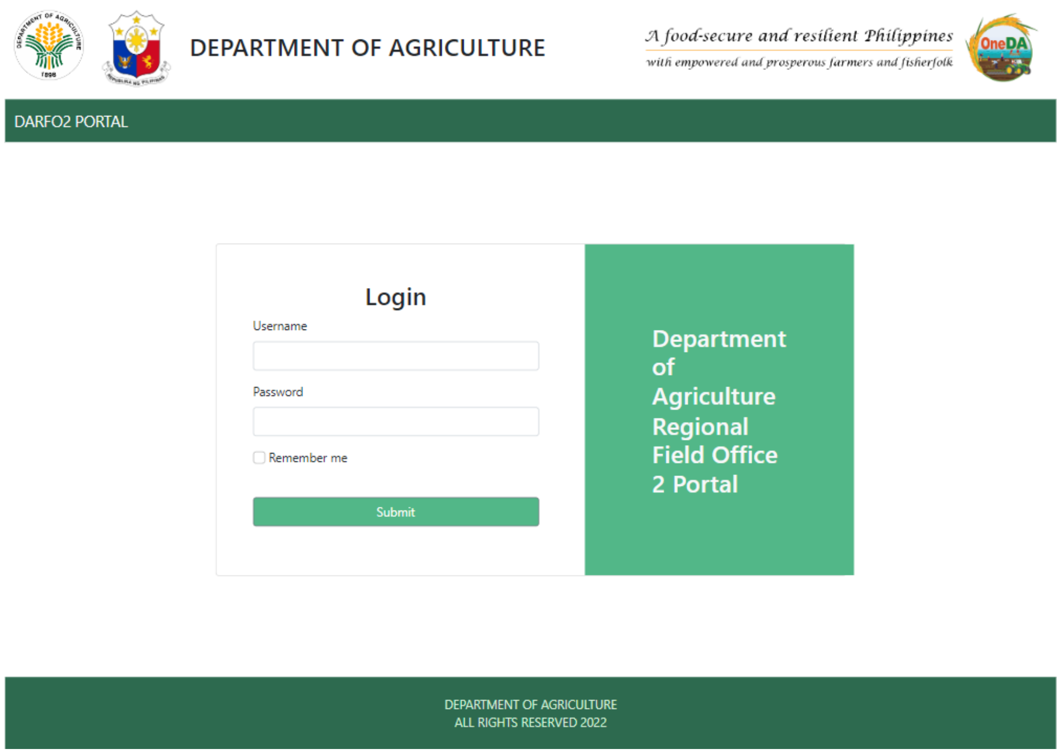


Figure 1. DA RFO 02 Portal Login Interface Mockup

The login interface requires the username and password. The “Remember me” checkbox stores the username and password to web browser cookies so that the next time users access the site, it will be automatically populated.

In the case of three (5) unsuccessful login attempts, the user account will be locked out for thirty (30) minutes.

Steps:

1. Provide username, password then click SUBMIT button

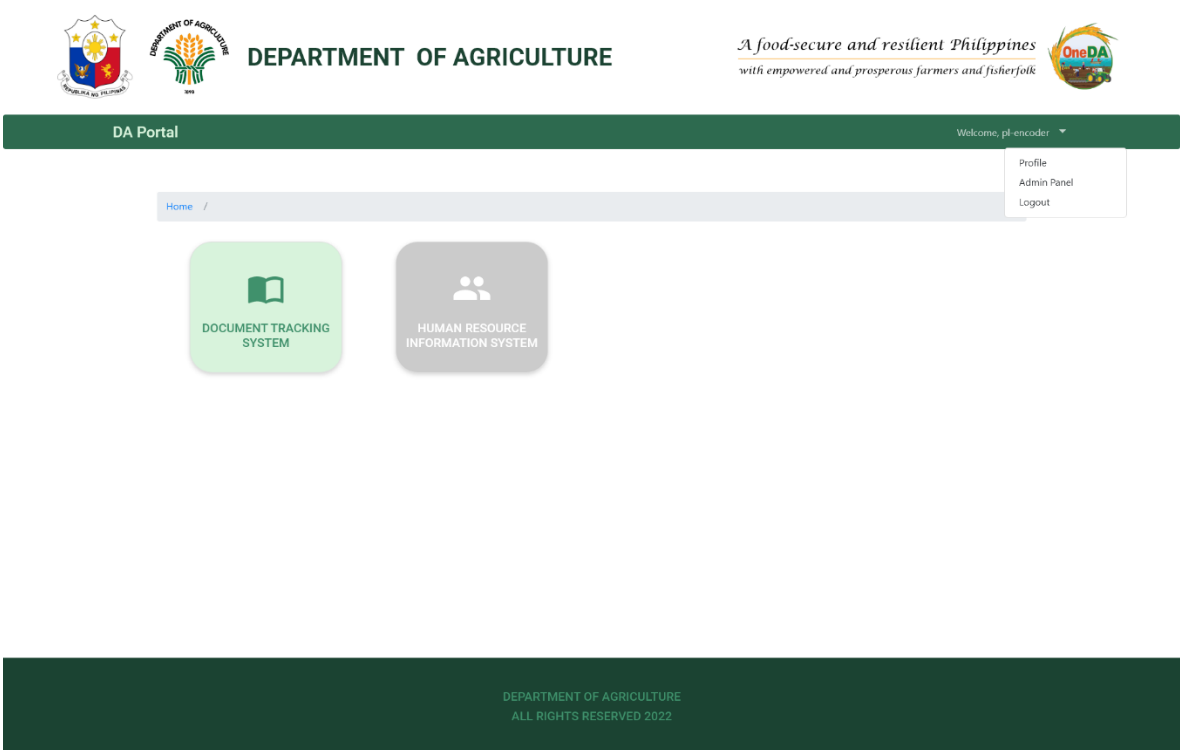


Figure 2. DA RFO 02 Portal Enterprise-Wide Home Page Interface Mockup

After successful authentication, login session is authenticated and the authenticated user is redirected to the enterprise-wide home page wherein the content view contains a tile view of several systems of DA RFO 02, in this proposed system's case, the Document Tracking System.

Steps:

1. Authenticated user to click anywhere inside the box of the Document Tracking System

#	Manual

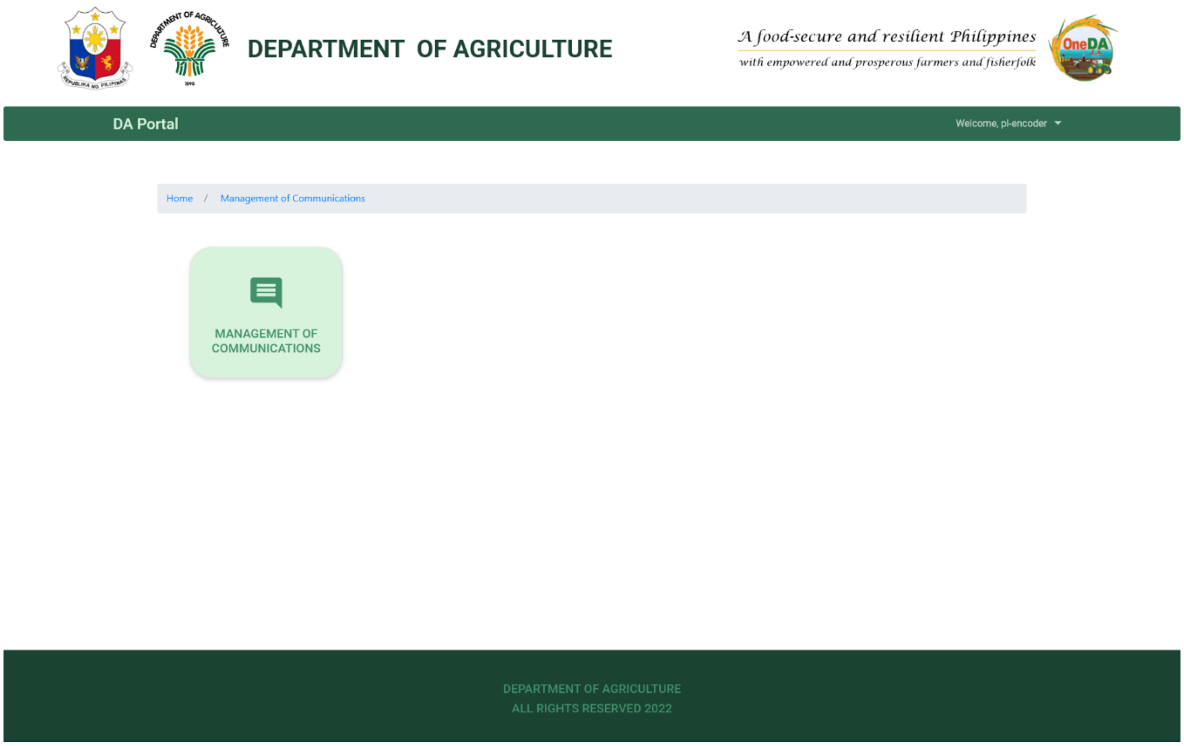
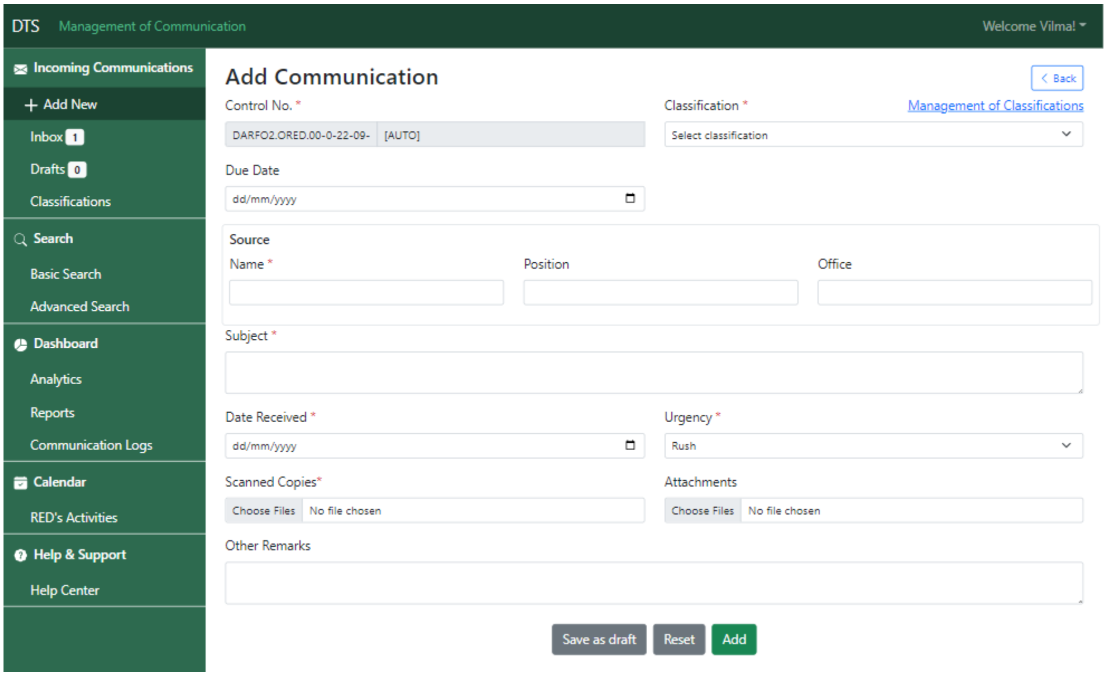


Figure 3. Document Tracking System Processes Home Page Interface Mockup

2. After clicking the Document Tracking System box, the authenticated user is redirected to the tile view of digitized business processes under the DTS, in this proposed system's case, Management of Communications. The authenticated user is to click anywhere inside the box of the Management of Communications.

Management of Incoming Communications

1-6



The Management of Communications have several modules. On the left sidebar navigation, the main modules are Incoming Communications, Search, Dashboard,

Figure 4. Management of Communications Process- Add Communication Interface Mockup

Calendar and Help & Support.

The Incoming Communication module has four (4) submodules: Add New, Inbox, Draft and Classifications.

Steps for Process-level Encoder:

1. The authenticated user is to navigate on the left sidebar under Incoming Communications and click + Add New.
2. The content view on the right side will show the Add Communication submodule.

   The Control No. field is automated.

   All fields with mark (*) are mandatory. Supply all fields with the appropriate data. In the case that Scanned Copies or Attachments are not yet available, the authenticated user has an option to “Save as draft” the record. Clicking Save as draft will redirect to the Management of Communications Home page while incrementing the counter for the Draft (0), i.e., Draft (1). Then, that draft communication is accessible only upon clicking the Draft submodule.

3. Clicking Add button will commit the record to the database, trigger the auto-notification event for the Process-level Reviewer and will show a modal containing the added communication.

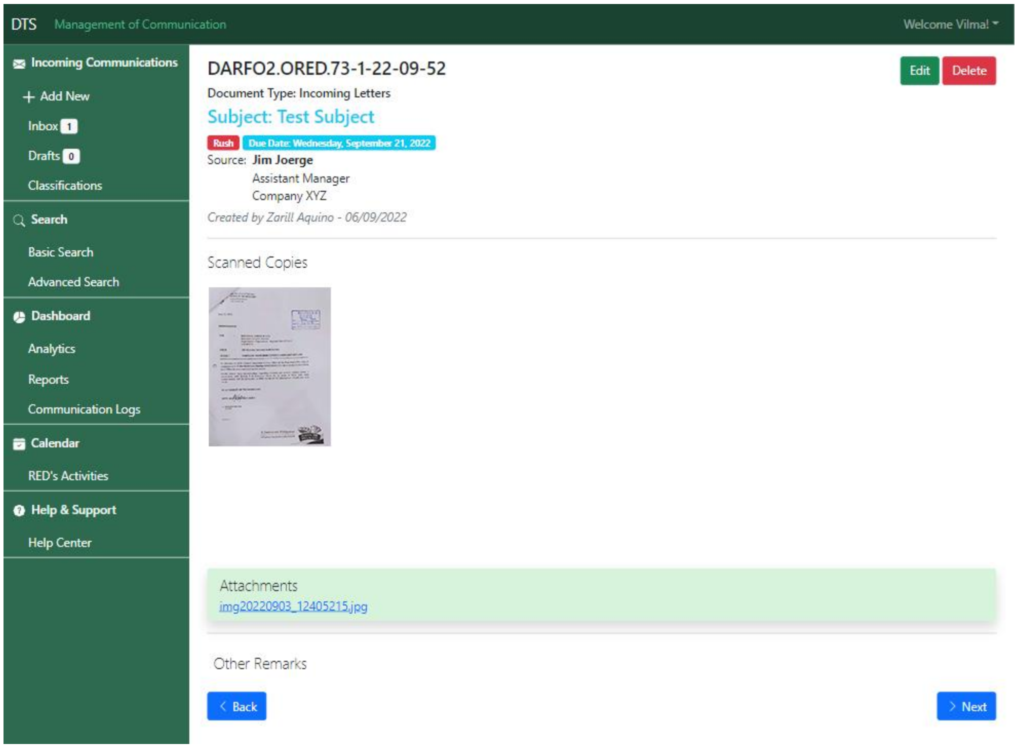


Figure 5. Management of Communications- View Communications Interface Mockup

Following the Add Communication submodule, the next task is the viewing or editing of the Process-level Reviewer before routing tasks. The Process-level Reviewer will receive a notification that will be accessible under the Inbox submodule or if the said user is in session, the link to the active notification may also be used both of which are avenues to the View Communication submodule. More details of the notification can be found under the Auto-Notification section of this Interface Mockup table.

The View Communication submodule is a single record view that is why other functions are attached to the submodule like Edit and View Revisions submodules.

Steps:

1. Authenticated user receives a notification on any means, i.e., the user is involved. Click the notification, any of the two options: toast notification or through Inbox.
2. The content view on the right side will show the View Communication submodule. The content is in reading mode with carousel capabilities for the scanned version of the communication and downloadable links for the attachments.

   A next button enabled indicates there are other tasks in store for the user, else, the task ends there.

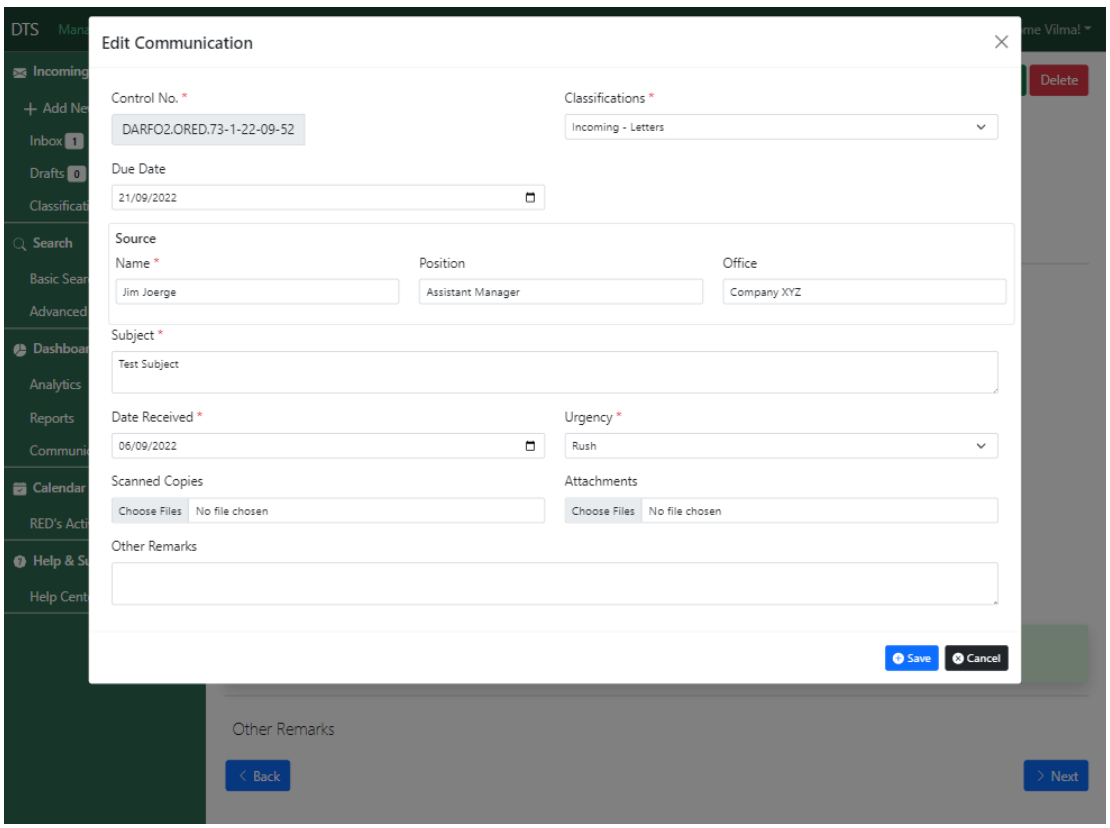


Figure 6. Management of Communications- Edit Communication Interface Mockup

Steps:

1. With reference to figure 10, the authenticated user is to click on the Edit button beside the Delete button to access the Edit Communication submodule.
2. The content view on the right side will show the Edit Communication submodule which has the same look with the Add Communication submodule except for the title and the cancel & save buttons.

The previously added contents are placed on their respective input forms. All input fields are editable except for the Control No. Edit desired fields.

3. Once all fields are edited with no form validation errors, clicking Save button will commit the changes to the database.

5

As you might have notice on the Add Communication submodule, there is a Manage Classification link which is just an instance of the Classification submodule. It will operate on a modal window with the same form as the Classification submodule (sub-menu). This is an option for the authenticated user to add classifications of communications while adding an incoming communication.

Classification management ideally is for control of the Process-level Reviewer to ensure that communication classifications are standards or statutory-based.

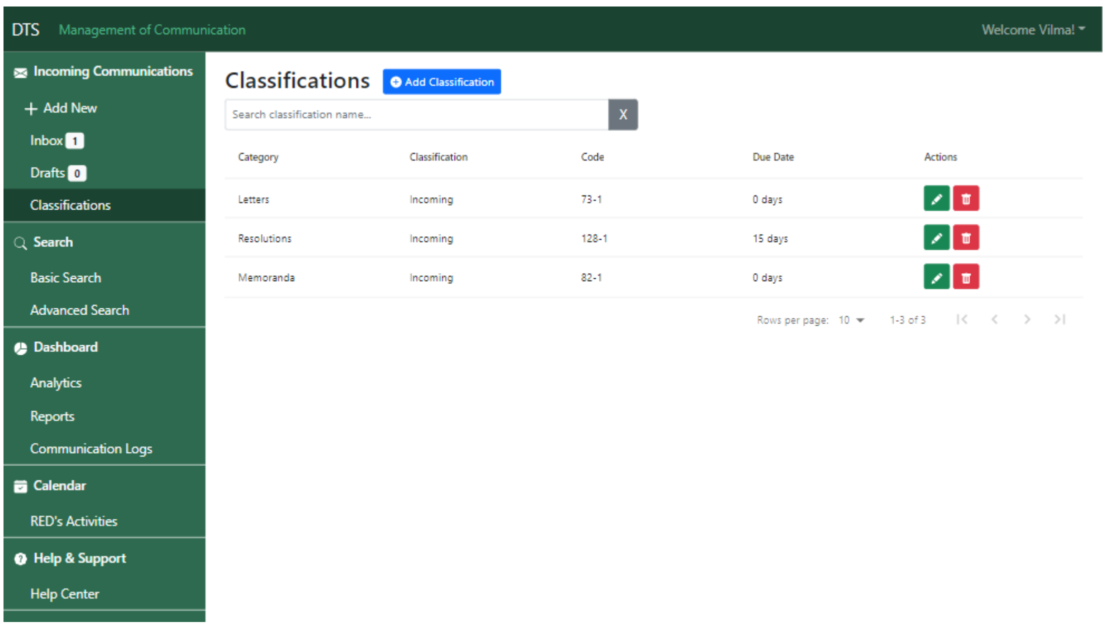


Figure 7. Management of Incoming Communications Process- Management of Communication Classification Interface Mockup

Steps for Process-level Reviewer:

1. The authenticated user is to navigate on the left sidebar under Incoming Communications and click Classifications.
2. The content view on the right side will show the View Classification submodule.

   The View Classification submodule contains the submodules for Add, Edit and Delete Classification. The Add Classification submodule is accessible through the + Add Classification button. Clicking the + Add Classification button will show a modal window with an input field, cancel and save buttons. After supplying the input with no form validation errors and saving, the record will be stored on the classification database table.

3. If the classification database table is not empty, a table of classifications with the edit and delete actions per classification record is listed. Clicking the edit button and delete button will trigger a similar modal window like the add classification. The edit classification modal window will have a pre-supplied editable input field, cancel and save buttons. Committing the changes will update the classification database table. Meanwhile, the delete classification works like a prompt dialogue box with a No and Yes button. Committing to Yes will change the classification record status to deleted, i.e., record is hidden.

Management of Routing

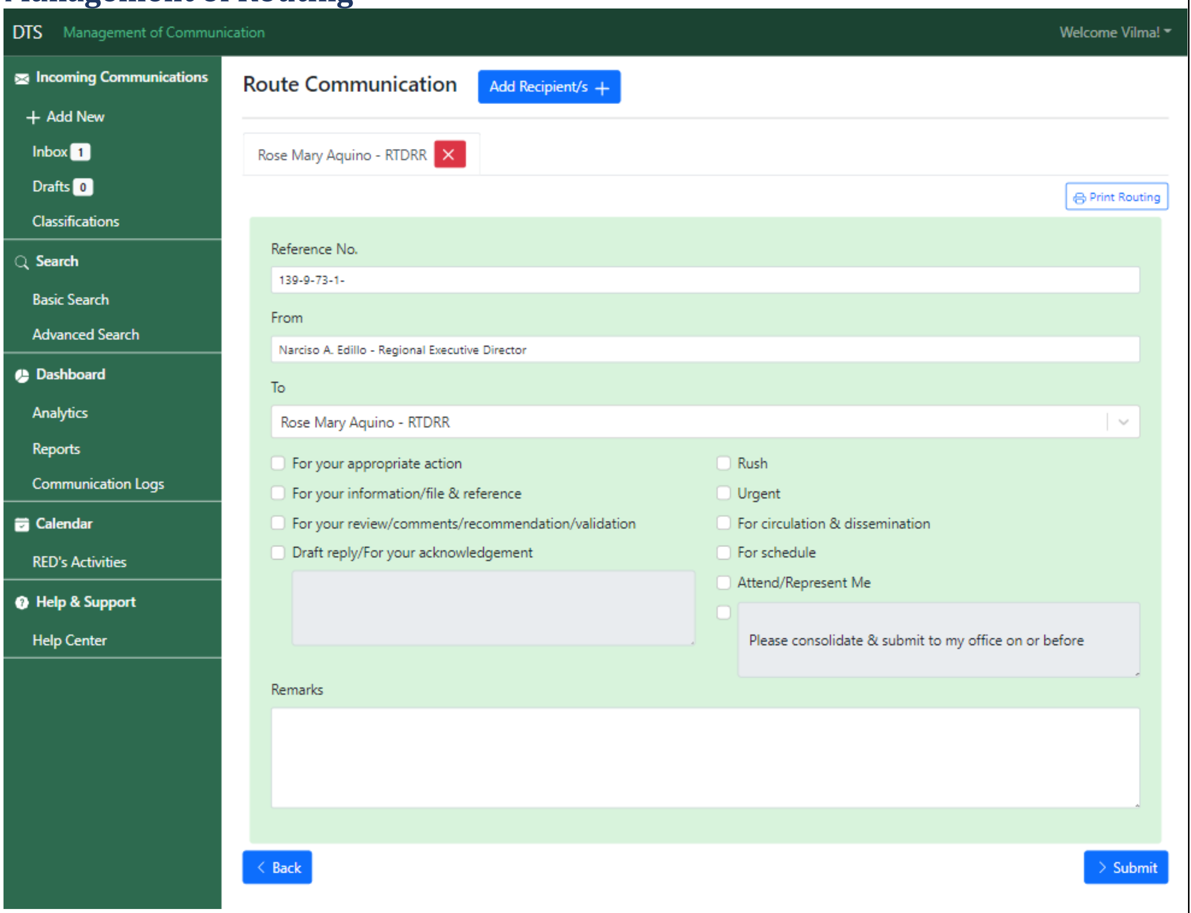


Figure 8. Management of Communications Process- Add Routing Interface Mockup

7-10 After the creation of a communication by a process-level encoder and the review of the process-level reviewer of that communication, the next task is the creation of initial routing to recipient/s.

There is a change in the design of the Add Routing task as opposed to the status quo. The process-level reviewer needs to specify routing information to individual

	recipients. This change is essential in order for the logic of the subsequent tasks to be correct. Steps (Process-level Reviewer): 1. Authenticated user receives an add routing notification. Click the notification through any of the two options: toast notification or through Inbox. 2. The user is redirected to the View Communication submodule with next button enabled. Click next button to access the Add Routing submodule. 3. The Add Routing view is similar to the physical routing slip for familiarity purposes. The Control No. field works the same as the Control No. of the Add Communication submodule explained on step 2. 4. The To input field will only accept a single recipient. The input field has intellisense capabilities to suggest a recipient. For multiple recipients, click the + Add Recipient button. 5. The checkboxes indicates types of actions and level of urgencies. The recipient with checked "For your appropriate action" will have the Add Actions Taken task. The recipient with checked "For your information/file and reference" will only have the View Communications submodule. Select the desired checkboxes per recipient then click Submit button to commit to the database and transfer to the next role.

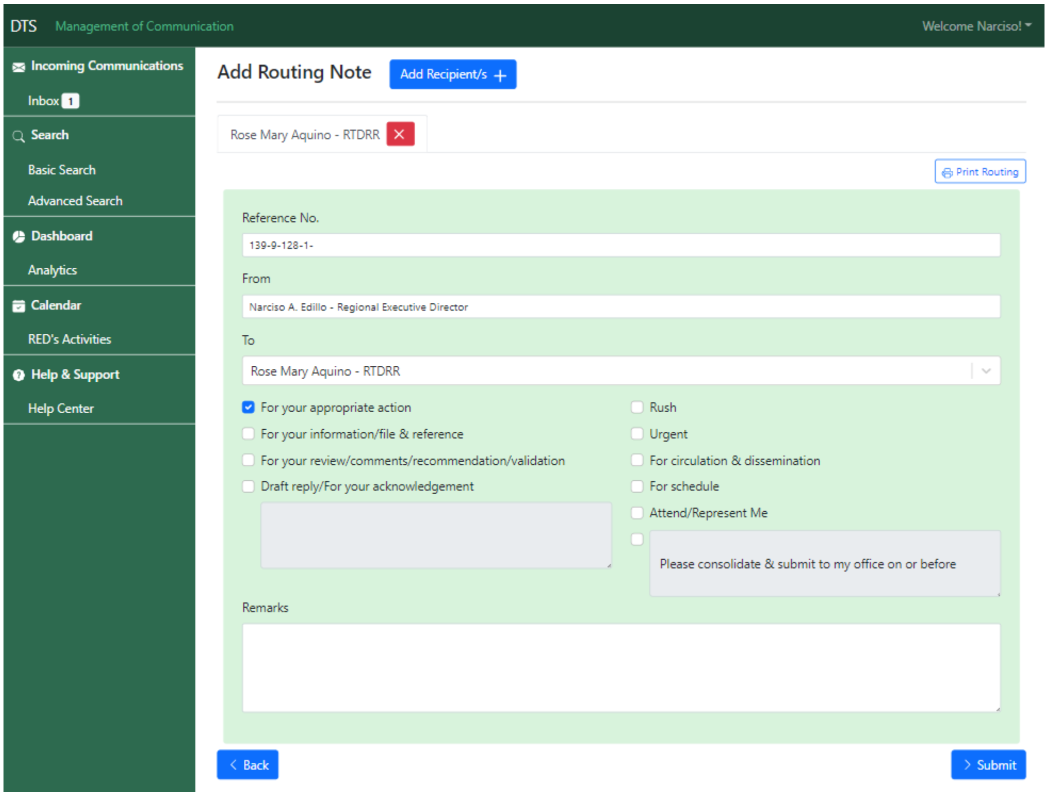


Figure 9.Management of Communications- Edit Routing+Remarks field Interface Mockup

After the initial routing of the process-level reviewer, the next task is the appending of routing note by the process-level approver to a recipient/s. Aside from the Remarks field, all other fields except for the Control No. are editable.

Steps (Process-level Approver):

1. Authenticated user receives an add routing note notification. Click the notification through any of the two options: toast notification or through Inbox.
2. The user is redirected to the View Communication submodule with next button enabled. Click next button to access the Edit Routing submodule plus Remarks field enabled.
3. Supply or select the desired changes, if any, or add remarks then click Submit button to commit the addendum and changes.

   After submitting, the next task is for the process-level reviewer to finalize using the same view then issue routing. As for rush urgency during the creation of a communication, the process-level reviewer will directly access the Add Routing+Remarks field.

In the case of an already routed communication, end-user approvers on the 2nd to 1st level have the capability to also Add Routing+ Remarks field.

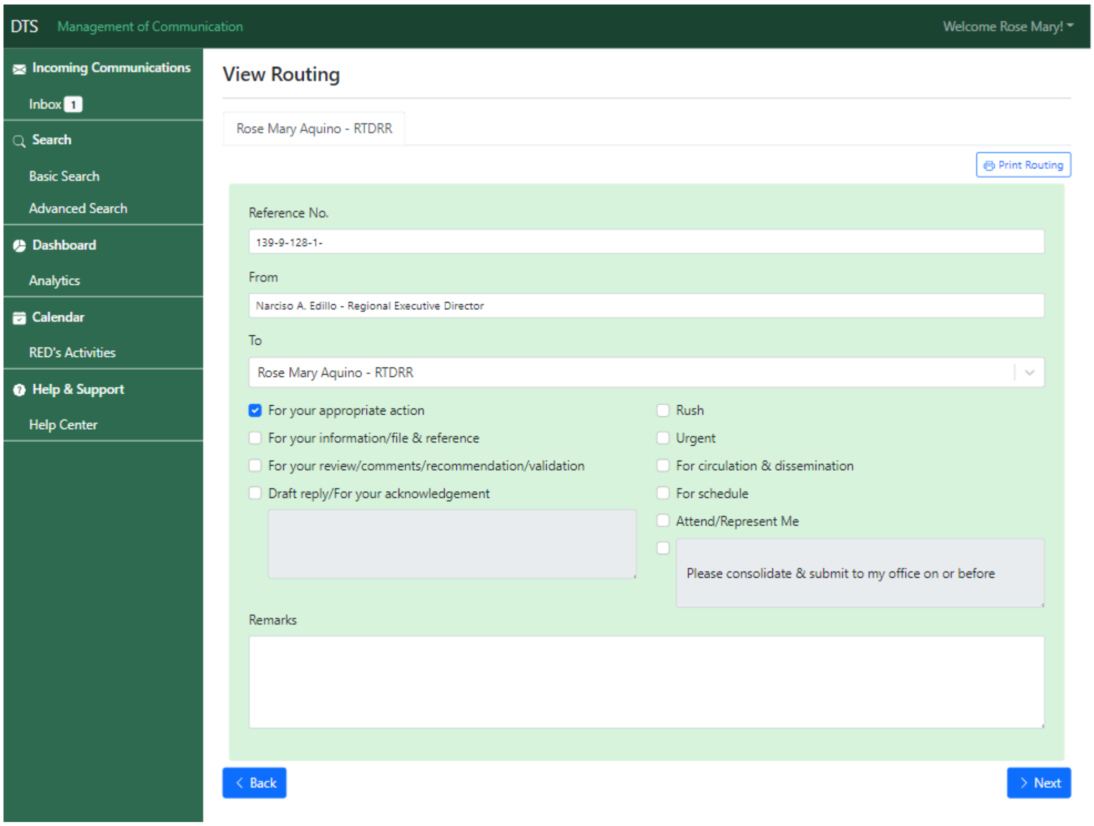


Figure 10. Management of Communications- View Routing Interface Mockup

Once routing is issued by the process-level reviewer, all recipients of the routing will receive a view routing notification. At this point, the communication is routed to user/s with end-user role/s.

Steps:

1. Authenticated user receives a view routing notification. Click the notification through any of the two options: toast notification or through Inbox.
2. The user is redirected to the View Communication submodule with next button enabled. Click next button to access the View routing submodule.

Management of Actions Taken

11 - 13 A routing with instruction that is not "For your information/file and reference" will append the Add Actions Taken task to the list of tasks of a user under a level 0 role, however, if the user's role is on level 2 or 1, they will have the Add Routing+Remarks field instead.

Steps:

1. Authenticated user receives an Add Actions Taken notification. Click the notification through any of the two options: toast notification or through Inbox.

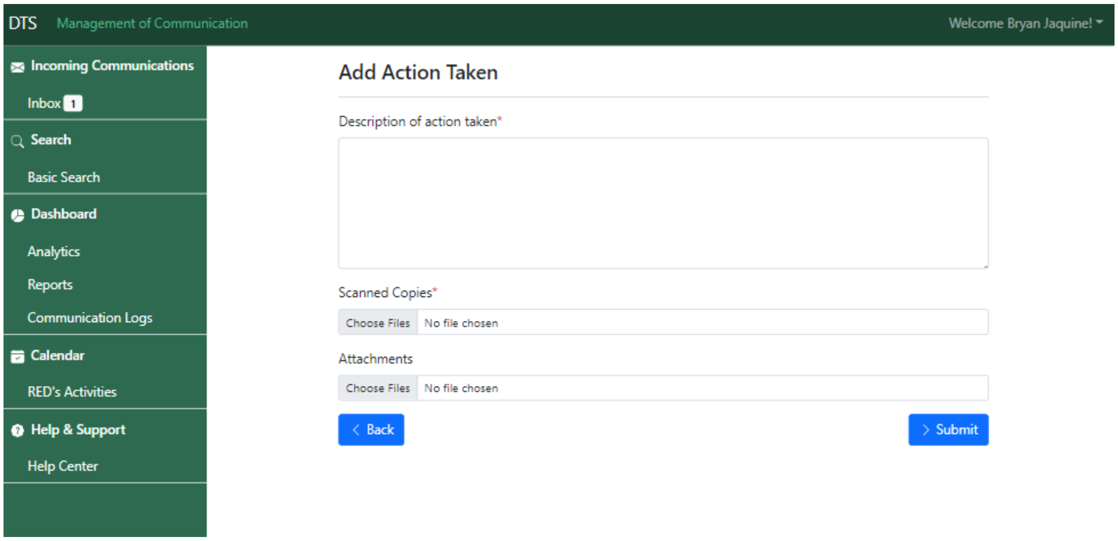


Figure 11. Management of Communications Process- Add Action Taken Interface Mockup

2. The user is redirected to the View Communication submodule with next button enabled. Click next button to access the View routing submodule. If there multiple routings coming from level 2 or 1 users, multiple view routing submodules will appear. Then, the last instance of view routing submodule's next button will direct to the Add Actions Taken submodule.
3. Supply the narrative version of the actions taken on the textarea while if available, upload the scanned copy of the response letter and the electronic copies of attachments of the response letter.
4. Clicking submit will commit to the database and send an approve/reject task from the user's respective supervisors/ managers

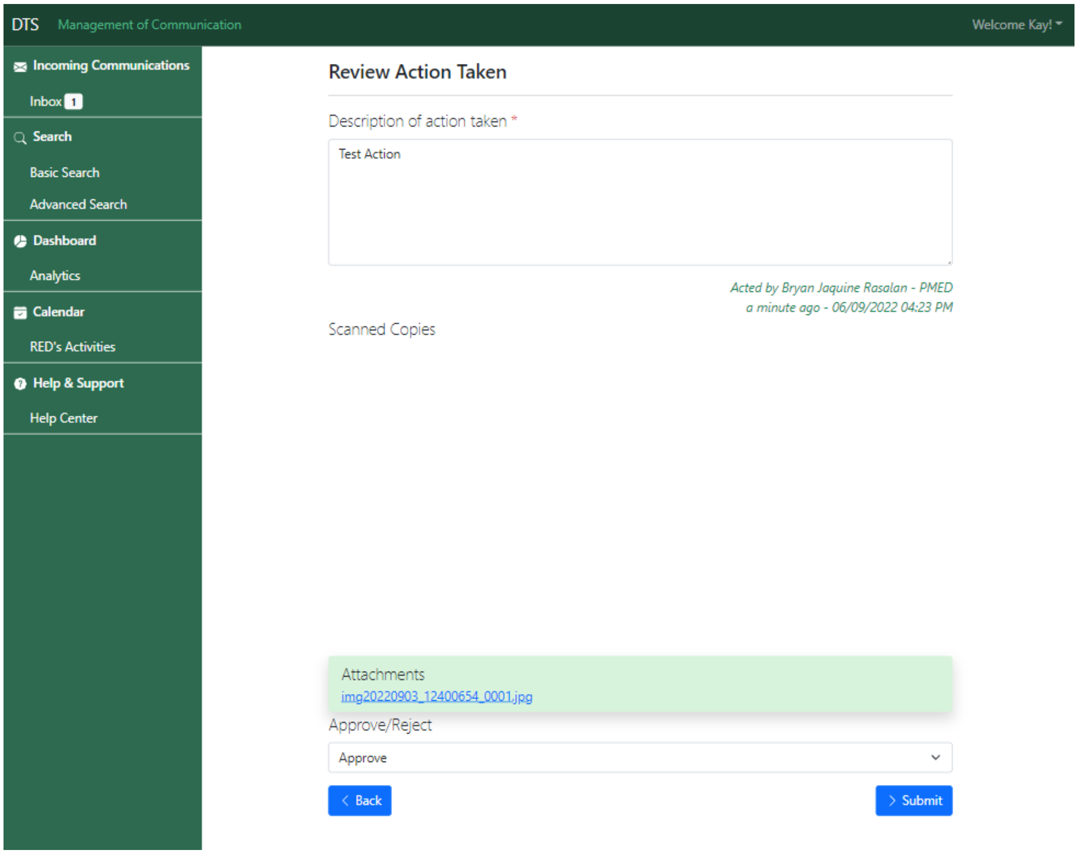


Figure 12. Management of Communications Process- Approve/Reject Actions Taken Interface Mockup

5. The respective supervisors/managers of the user receives an Approve_reject Actions Taken notification. They click the notification through any of the two options: toast notification or through Inbox then they will be redirected to the View Actions Taken+ Approve/Reject dropdown.

6. Clicking Submit button will iterate the Approve_reject Actions Taken notification before the end of the hierarchy.

Search Records

14

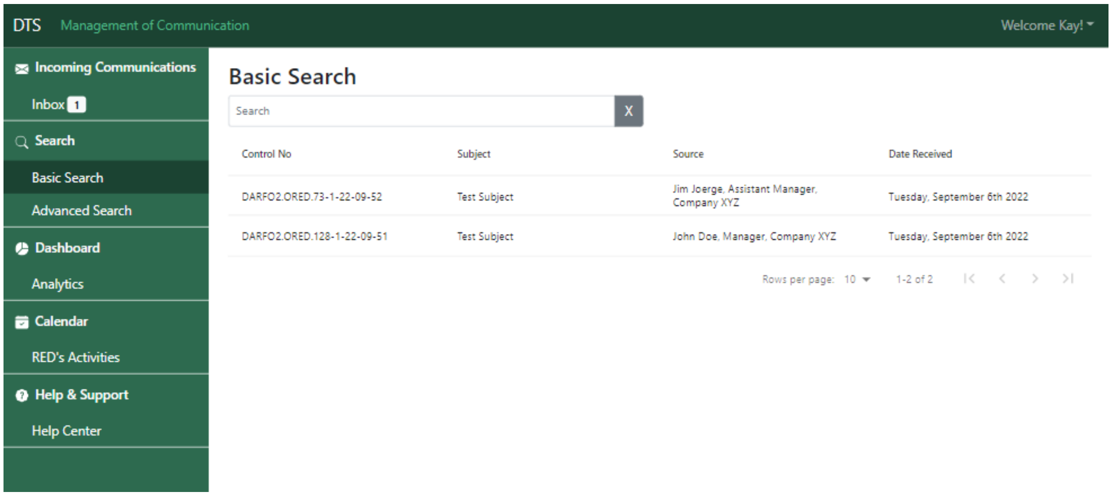


Figure 13. Management of Communications Process- Basic Search Interface Mockup

Communications searching for the purpose of tracking a communication lifetime from system entry until approved actions taken comes in two (2) forms: basic and advanced.

The basic search accepts any keyword and searches the database tables communications and routing. This form of searching usually entails time to generate results, hence, loading and pagination visual mechanisms will be ensured.

Steps:

1. The authenticated user has two (2) options to use the basic search, first is the search bar on the header and the second is the left sidebar navigation under Search > Basic Search. As for the second option, click Basic Search submodule then the content view will render search bar and search results pane.
2. On either of the two options, supply the keyword then click Search button.
3. If the search operation returns results, the label "(n) matches found" will be updated and the table will be populated, else, the label will show (0) matches found.

<table>
<tr>
<td></td>
<td>

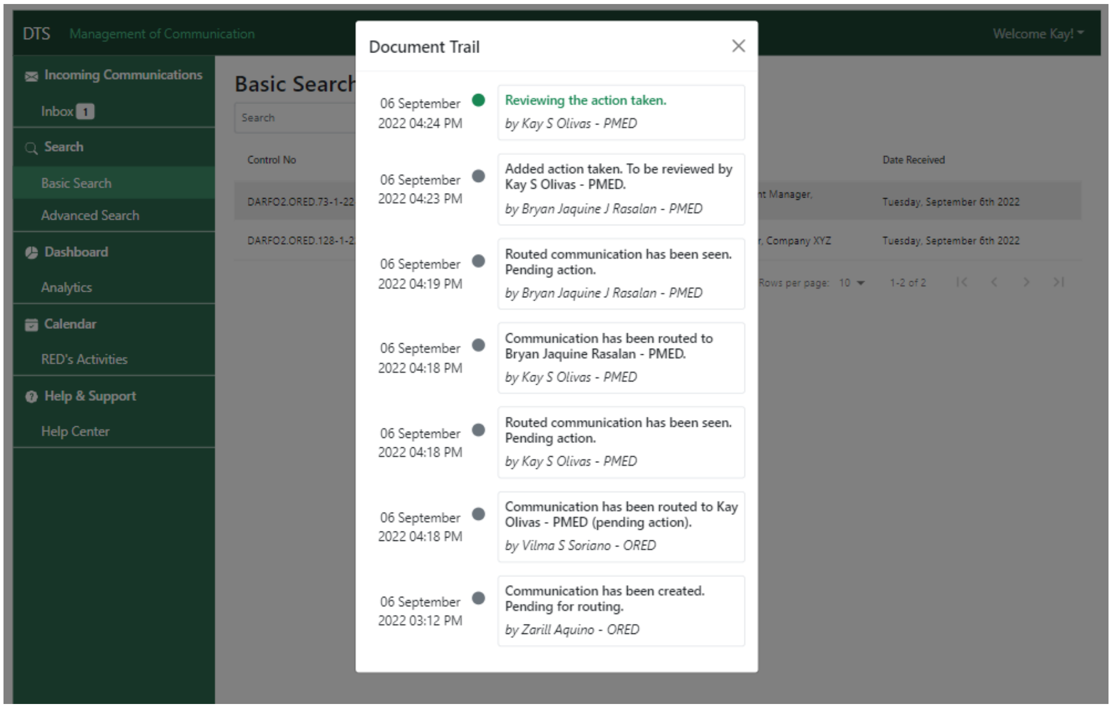


Figure 14. Management of Communications Process- Document Trail Interface Mockup

4. Authenticated user to navigate on the results table to locate the record of interest.
5. Authenticated user to click anywhere inside the box of a record or row in any cell or the text within the record or row to access its document trail which is shown through a modal and organized in a timeline view in descending order.
6. To exit the document trail modal, click the (x) icon on the upper right portion of the modal.

</td>
</tr>
<tr>
<td>15</td>
<td>

The advanced search works with filters and date ranges. The filters are based on the appropriate data fields on the database tables communications and routing. This form of searching either narrows down search results or returns a specific record.

Steps:

1. The authenticated user is to navigate on the left sidebar under Search and click Advanced Search.
2. The content view on the right side will show the Advanced Search submodule. The components are the same with the basic search except for the search bar. The advanced search bar is a dropdown button. Click anywhere inside the advanced search bar and a modal for filters and date ranges will appear below it.
3. Authenticated user can add as many filters as possible by clicking the Add New +. Deleting a filter is through the red trash bin icon.
4. Authenticated user to select and supply all input and date range fields then click Search button.
5. The next steps are the same with steps 3 to 6 of the basic search.

</td>
</tr>
</table>

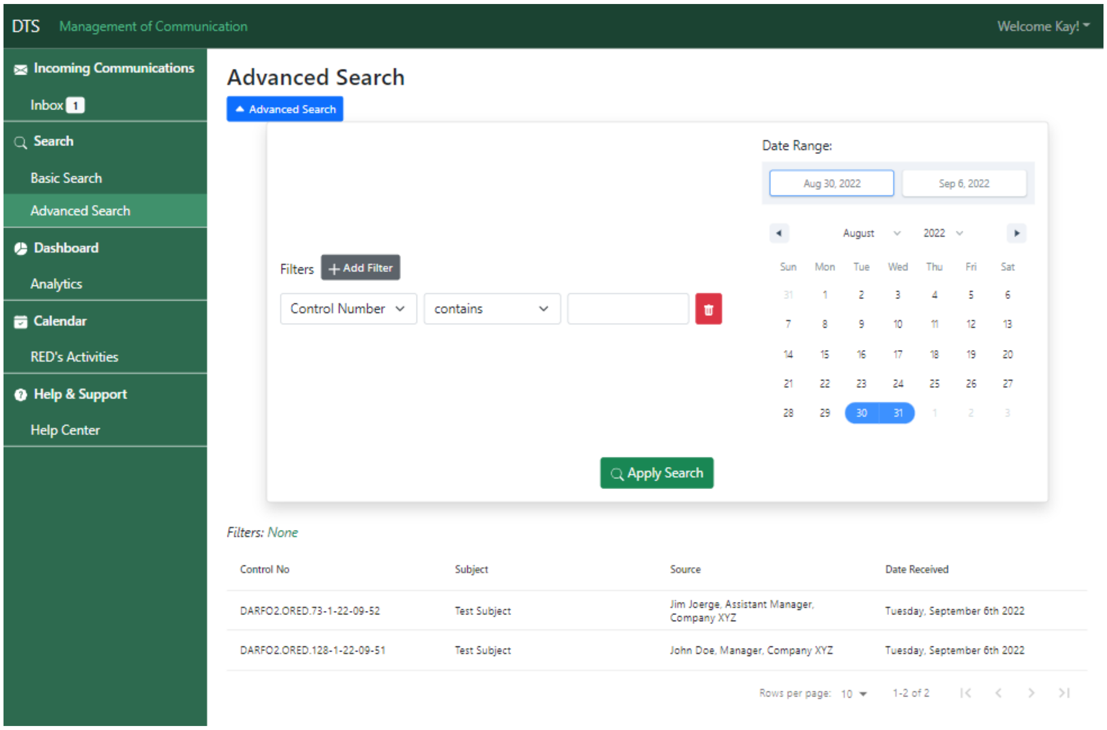


Figure 15. Management of Communications Process- Advanced Search Interface Mockup

Auto-notification

16

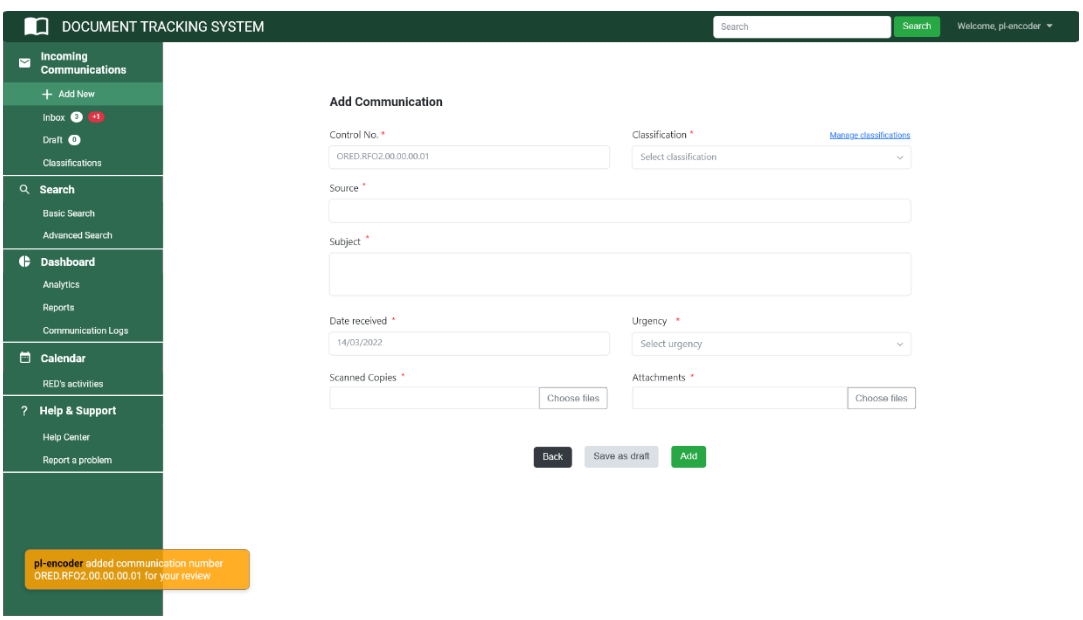


Figure 16. Management of Communications Process-Active Notification Interface Mockup

Auto-notification comes in two ways, active and passive. In active auto-notification, the authenticated user in session is flashed with a so-called toast notification that lasts 30 seconds before it dissapears. After toast dissapearance, the notification is passed to the passive notification feature accessible through Incoming Communications > Inbox while instantiating or incrementing a visual counter on the right of the inbox which is wrapped in red background just like Facebook notifications.

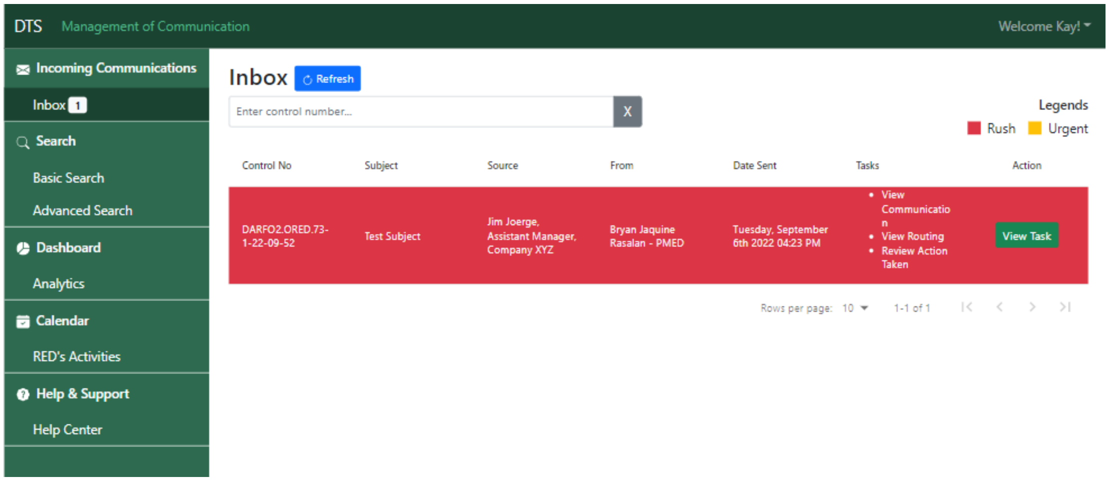


Figure 17. Management of Incoming Communications Process- Notification Inbox Interface Mockup

Dashboard Analytics

17 - 18

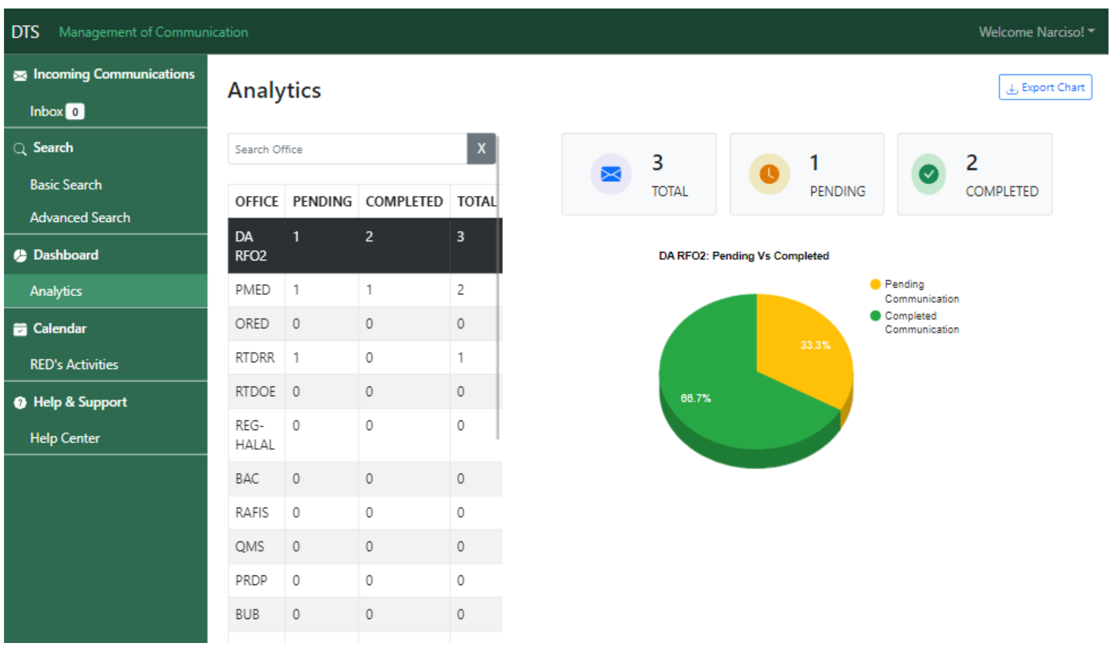


Figure 18. Management of Communications Process- Analytics Interface Mockup

The Dashboard module has three (3) submodules: Analytics, Reports and Communication Logs. Access to the contents of the Dashboard module is limited to the assigned role of the user and their respective jurisdiction based on the DA RFO 02

<table>
<tr><td></td><td>organizational structure as discussed on section 2.3 of this proposed system's SRS document.

The Analytics submodule shows visualizations of analyses of data. It may be descriptive statistics or the process performance rendered to charts, graphs and the like.

Steps:

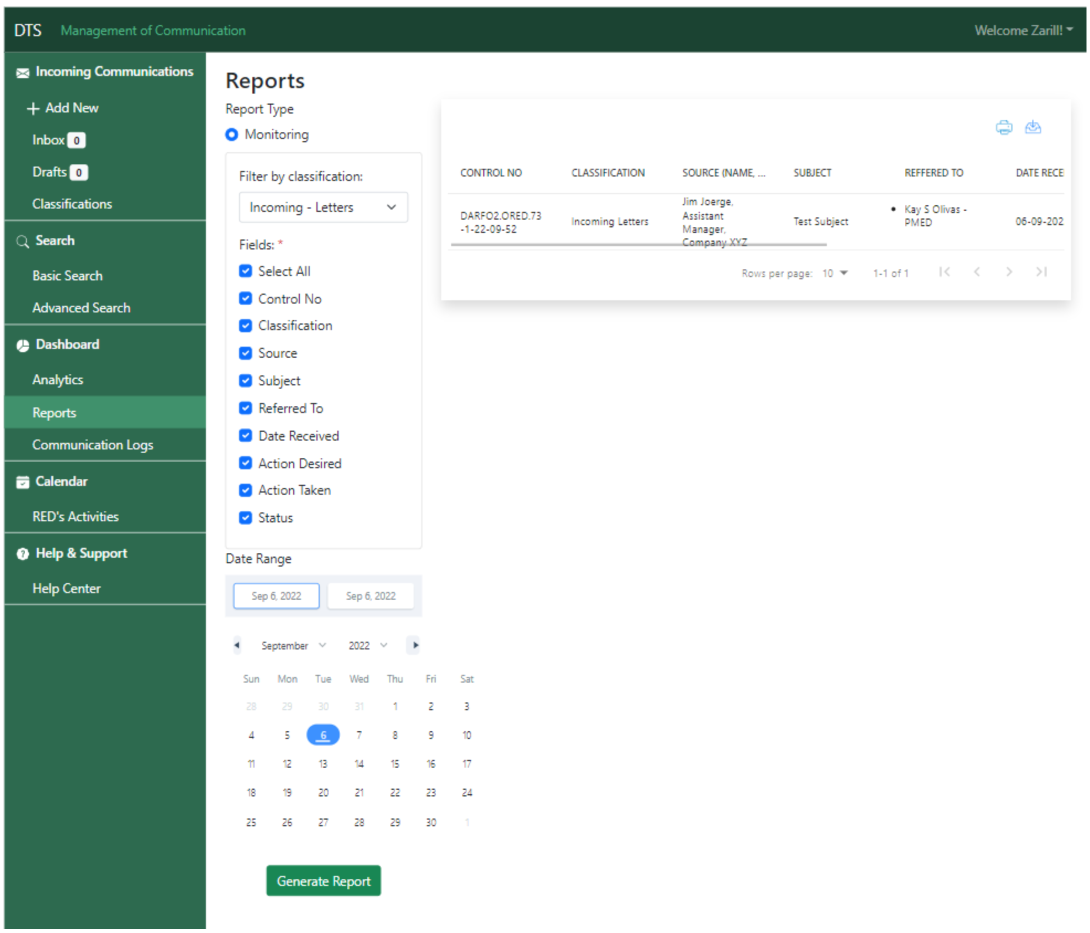
1. The authenticated user is to navigate on the left sidebar under Dashboard and click Analytics.
2. The content view on the right side will show the Analytics submodule. The submodule will have search office functionality to filter the analytics by office. It will also have an export feature to export an image version of the chart or graph.</td></tr>
<tr><td>19
-
20</td><td>

Figure 19. Management of Communications Process- Reports Interface Mockup

The reports submodule allows users to produce a table or spreadsheet version of the data populated or processed through the system.

Steps:</td></tr>
</table>

1. The authenticated user is to navigate on the left sidebar under Dashboard and click Reports.
2. The content view on the right side will show the Reports submodule. The content is divided into two components, the select or filter pane on the left and the results pane occupying more space on the right. If to use a pre-defined report template, specify the date range and select the choice template. After clicking the selection, the report will show on the results pane with pagination. As for custom made report, specify the date range then check the available check boxes of data fields. Click on the submit button to reflect the data on the results pane.
3. To export the report to XSLX file types, click on the Export button.
4. To print the report, click on the Print button

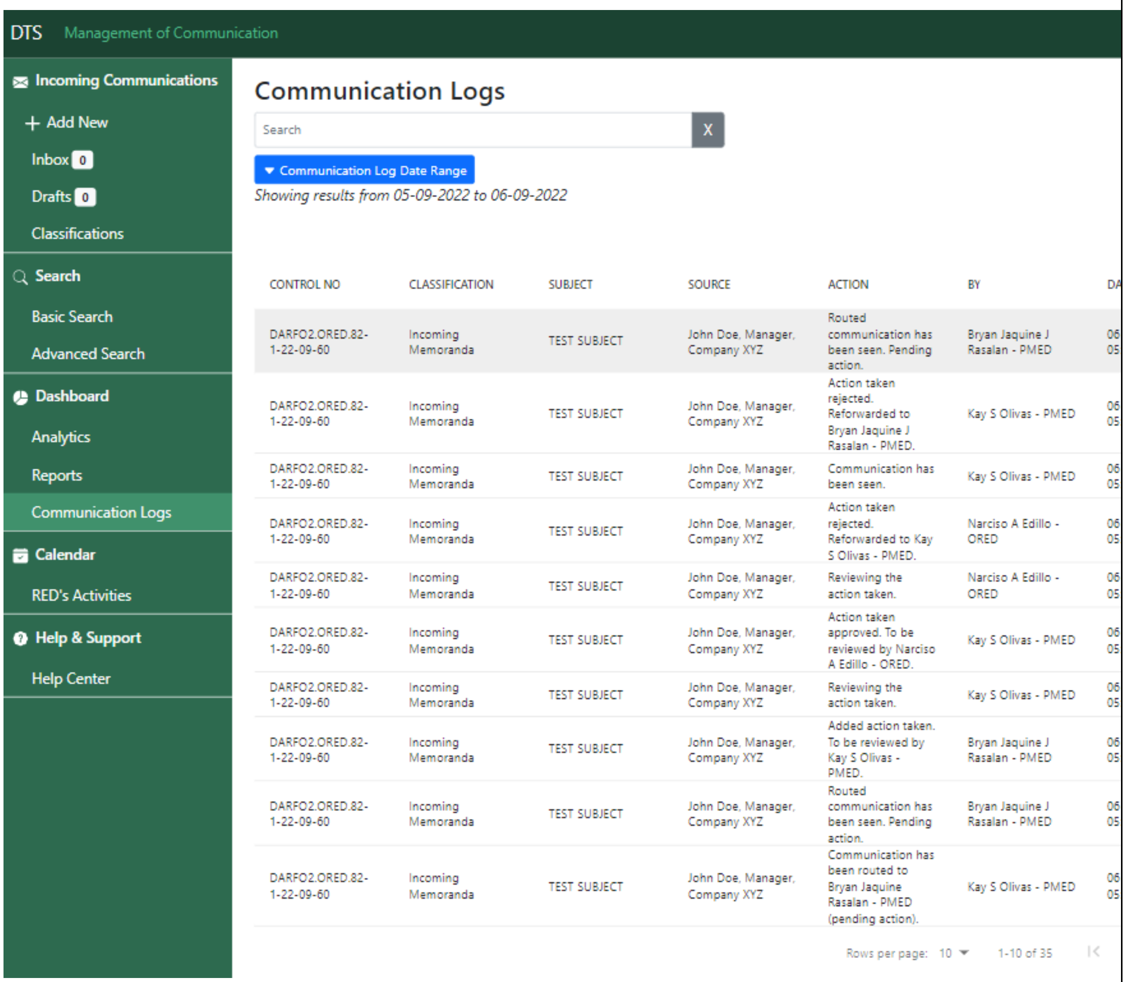


Figure 20. Management of Communications Process- Communications Log Interface Mockup

Communication logs contain all of the activities done within the Management of Communications process from the addition of a communication until the approval of actions taken including actions like printing and exporting

Steps:

1. The authenticated user is to navigate on the left sidebar under Dashboard and click Communication Logs.
2. The content view on the right side will show the Communication Logs submodule. The view is quite similar with the Reports submodule. The difference is that the select date range is integrated on the table view. Specify the date range to narrow down the logs.
3. Printing and exporting logs is the same with steps 3-4 of reports.

Calendar

21

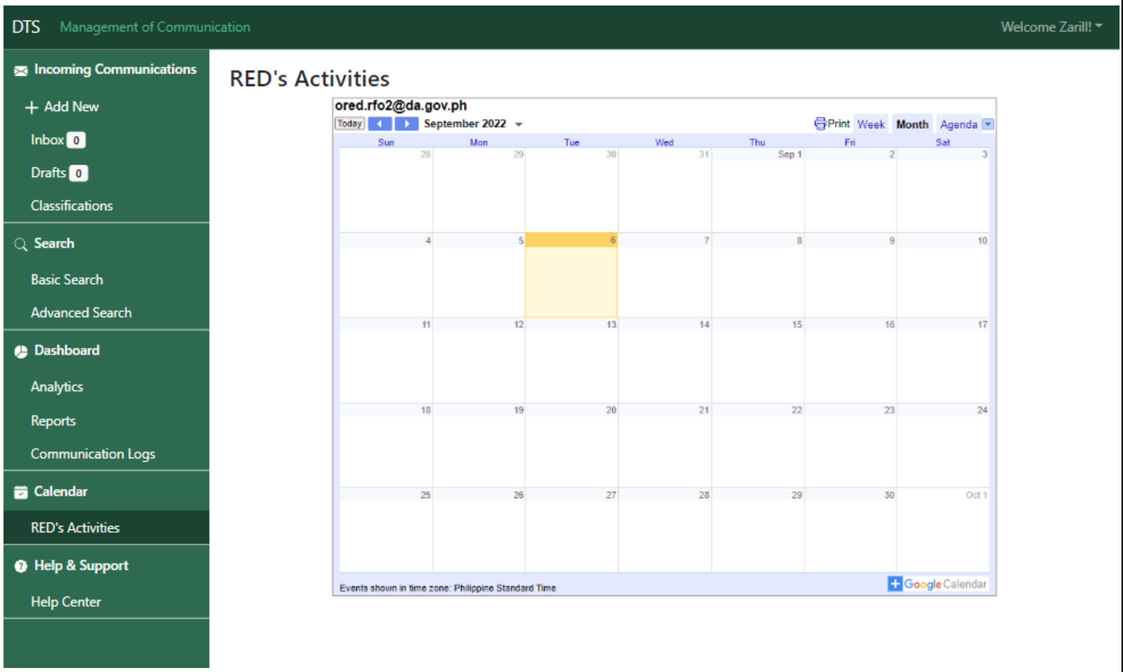


Figure 21. Calendar of Activities Interface Mockup

Calendar is a View only third-party calendar app API integration to the DTS (ORED context). The contents of the calendar will still be controlled through the website or app of the third-party calendar app.

Steps:

1. The authenticated user is to navigate on the left sidebar under Calendar and click RED’s activities.
2. The content view on the right side will show the Calendar submodule. It contains a link located at the upper right “Go to Google Calendar” and the View only calendar. Clicking the “Go to Google Calendar” will add a new tab to the browser loading the main website or app of Google Calendar for the purposes of populating calendar of activities of the RED

Help & Support

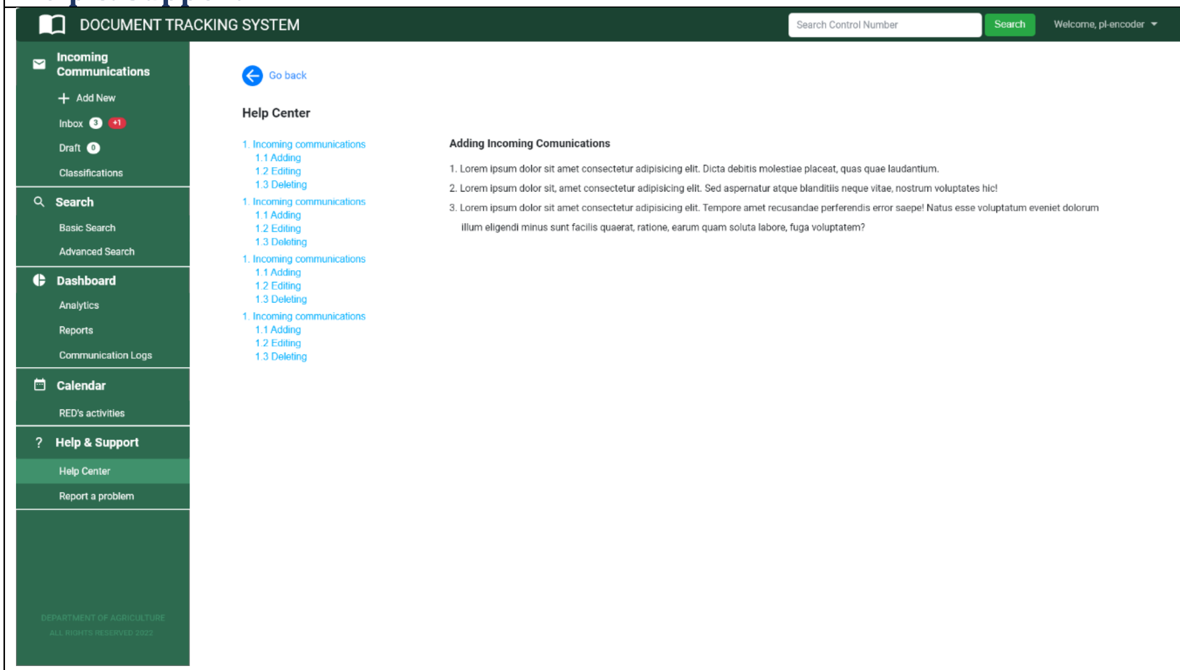


Figure 22. Management of Communications Process- User Manual Interface Mockup

The Help Center contains the web version of the user manual of the system.

Steps:

1. The authenticated user to navigate on the left sidebar under Help & Support and click Help Center.
2. The content view on the right side will show the help submodule. The view has a clickable table of contents of the manual on the left and a content pane on the right.

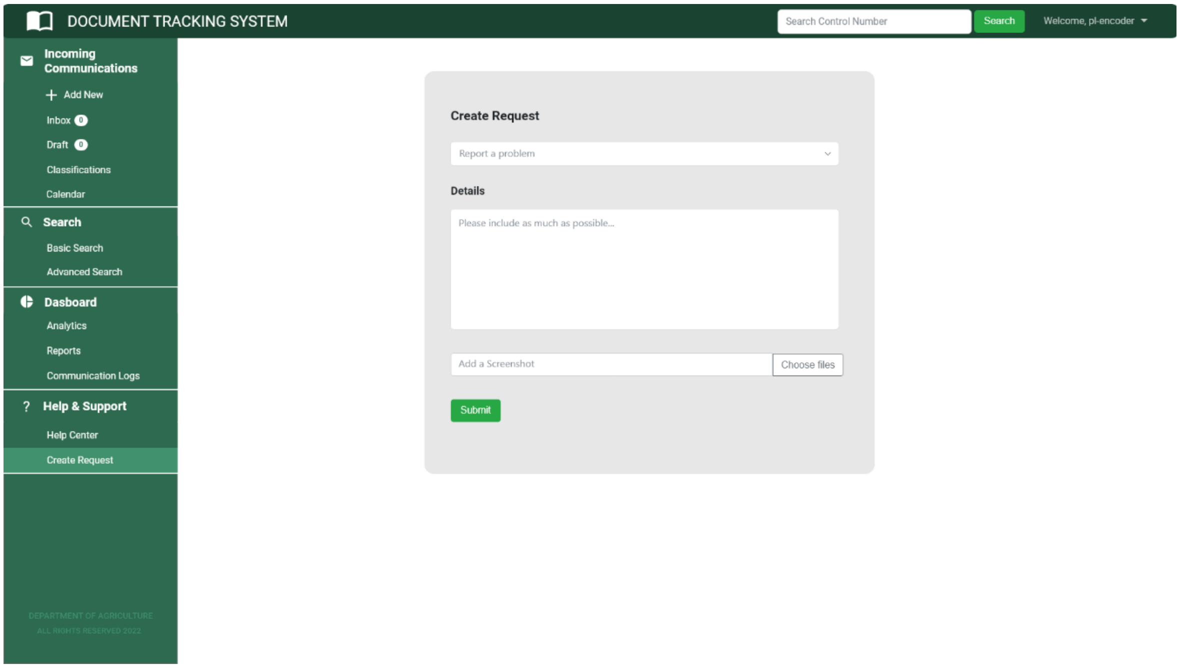


Figure 23. DA RFO 02 Portal Create Request Interface Mockup

Ticketing system for the report of bugs, system issues and other pertinent requests is also included on the enterprise-level of the portal. The Create Request submodule has a dropdown for the type of request, the details of the request and a file input for uploading screenshots of bugs and other evidences.

- **Accounts**

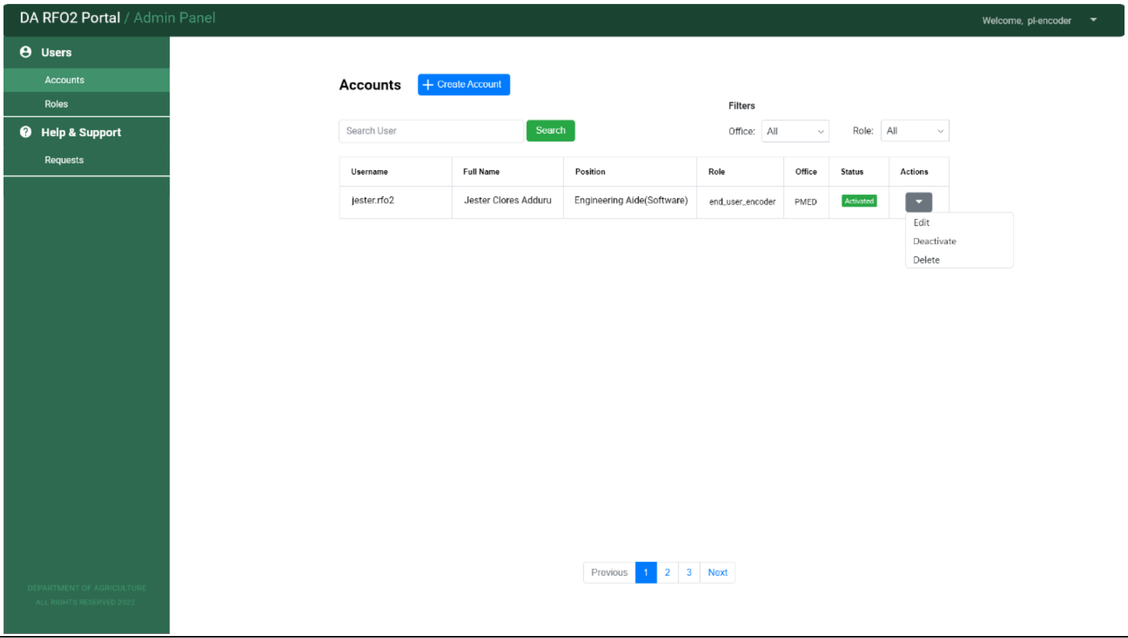


Figure 30. DA RFO 02 Portal Admin Panel - View User Accounts Interface Mockup

The DA RFO2 Portal Admin Panel is accessible to users with appropriate permissions. This page has several modules. On the left sidebar navigation, the main modules are Users and Help & Support.

The Users module has four (2) submodules: Accounts and Roles.

The View User Accounts module contains the lists of all users of the DARFO2 portal. Here, user with appropriate permission will be able to create, edit, deactivate/activate and delete account. User is also provided with searching and filtering functionality of user accounts.

Steps for System Admin

1. The authenticated user is to navigate on the left sidebar under Users and click Accounts.
2. The content view on the right side will show the View User Accounts submodule.

   The View User Accounts module contains the submodules for Create, Edit and Delete Accounts. The Create Account submodule is accessible through the + Create Account button. Clicking the + Create Account button will show a modal window with input fields, cancel and save buttons (Figure 31). After supplying the input with no form validation errors and saving, the record will be stored on the users, login and employee database table.

3. If the users database table is not empty, a table of accounts with the dropdown menu of actions per account record is listed. Clicking the edit button and delete button on

the dropdown menu will trigger a similar modal window like the create account. The edit account modal window will have a pre-supplied editable input field, cancel and save buttons. Committing the changes will update the users database table.
The deactivate button in the dropdown list is dynamic, if the account is activated the text that will show on the dropdown list is deactivate and vice versa, clicking the deactivate button will deactivate the account where the user will not be able to use the account. Meanwhile, the delete button works like a prompt dialogue box with a No and Yes button. Committing to Yes will change the account record status to deleted, i.e., record is hidden.

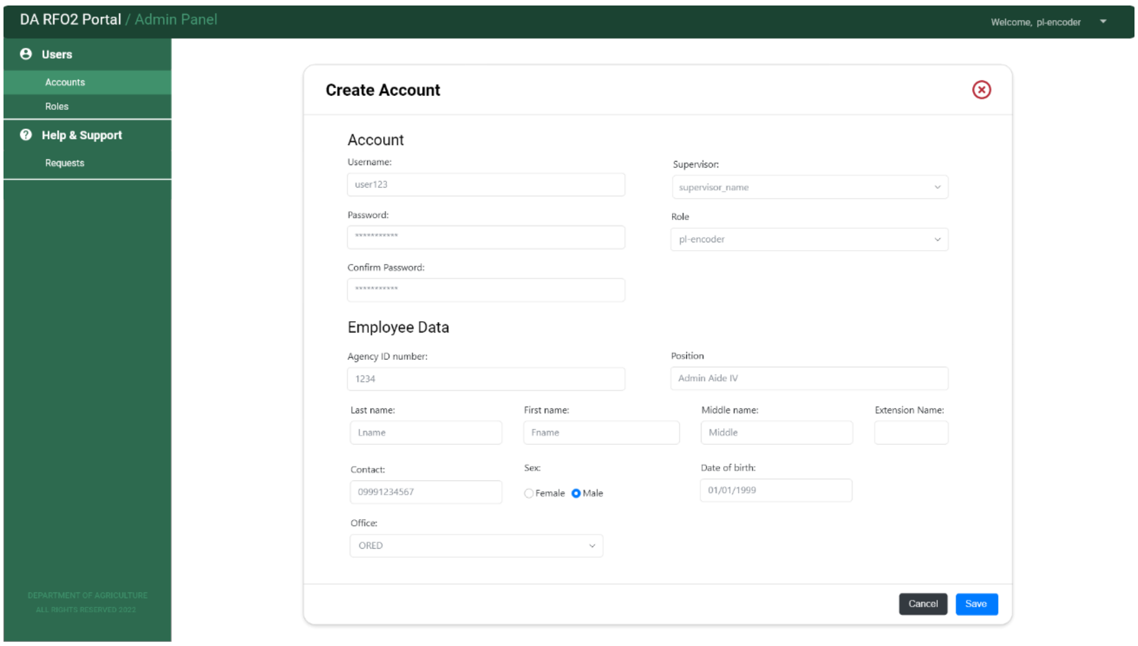


Figure 31. DA RFO 02 Portal Admin Panel – Create Account Interface Mockup

- **Roles**

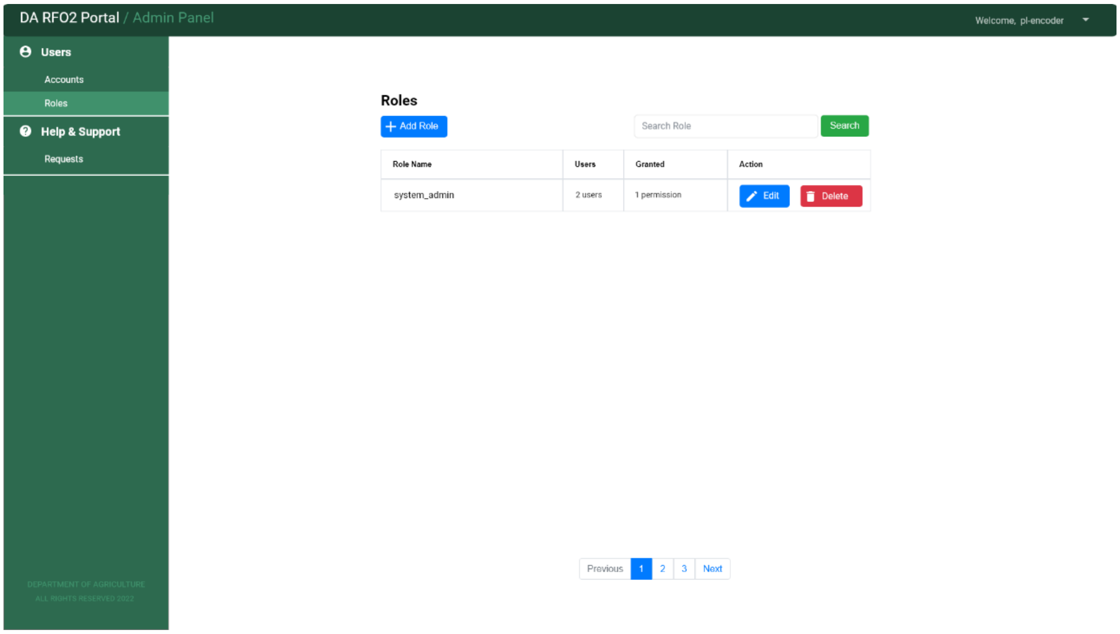


Figure 32. DA RFO 02 Portal Admin Panel – View User Roles Interface Mockup

The View User Roles module contains the lists of all roles. Here, user with appropriate permission can create role, assign permissions to role, edit role and delete role.

Steps for System Admin

1. The authenticated user is to navigate on the left sidebar under Users and click Roles.

2. The content view on the right side will show the View Roles submodule.

The View Roles Module contains the submodules for Add, Edit and Delete Roles. The Add Role submodule is accessible through the + Add Role button. Clicking the + Add Role button will show a modal window with form input for role name and lists of checkboxes for assigning permissions to role, cancel and save buttons (Figure 33). After supplying the role name and permissions with no form validation errors and saving, the record will be stored on the roles, role_permissions database table.

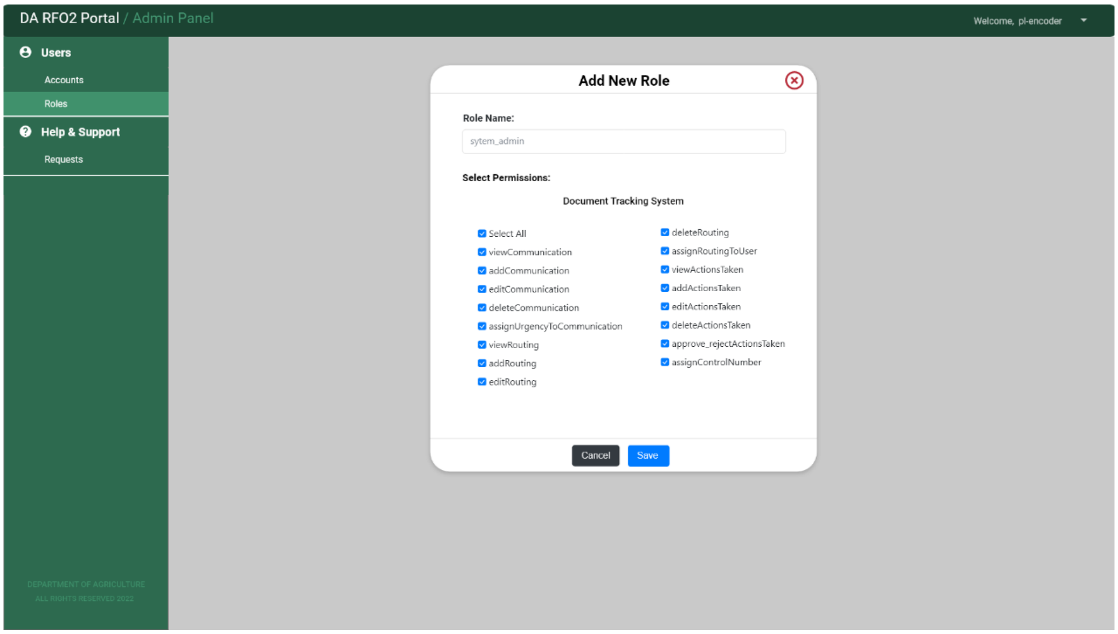


Figure 33. DA RFO 02 Portal Admin Panel – Add New Role Interface Mockup

3. If the roles database table is not empty, a table of roles with the edit and delete button per account record is listed. Clicking the edit button will trigger a similar modal window like the add role. The edit role modal window will have a pre-supplied editable input field and permission checkboxes, cancel and save buttons. Committing the changes will update the role and role_permissions database table. Meanwhile, the delete button works like a prompt dialogue box with a No and Yes button. Committing to Yes will change the account record status to deleted, i.e., record is hidden.

- **Requests**

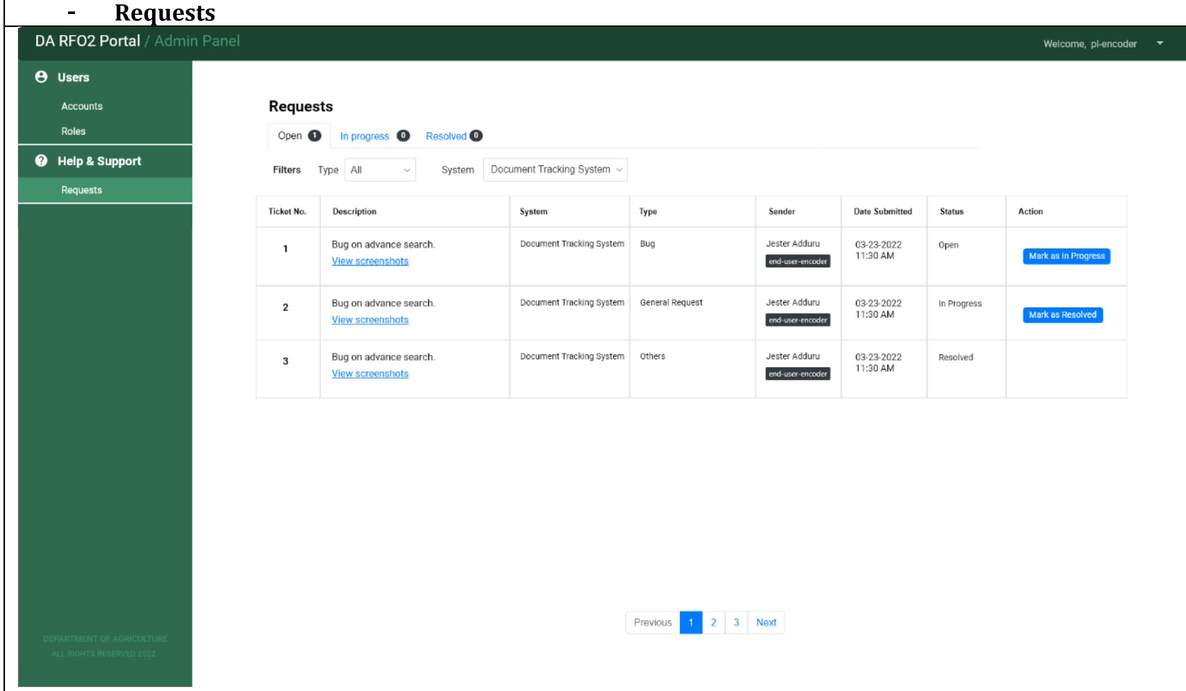


Figure 34. DA RFO 02 Portal Admin Panel – Help & Support – View Requests Interface Mockup

The View Requests module displays the lists of tickets. These tickets are requests from users, it can be a bug/problem encountered, general request and others. This module will be used to process, manage, and track user issues from submission to resolution.

Steps for System Admin

1. The authenticated user is to navigate on the left sidebar under Help & Support and click Requests.
2. The content view on the right side will show the View Requests submodule.
3. If the requests database table is not empty, a table of request tickets with the button Marks as In Progress (the request is being addressed) and Mark as Resolved (the request has been resolved) per ticket record is listed. These buttons are dynamic, if the request ticket's status is Open the button that will be displayed is Mark as In Progress, else if the status is In Progress the button that will be displayed is Mark as Resolved but if the request ticket's status is resolved there will be no button for action.