Integrated Transport Management System

User Guide for Credit

Version 1.0

For

SAF/DSTA

1. Document Control

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ITMS User Guide v1.0

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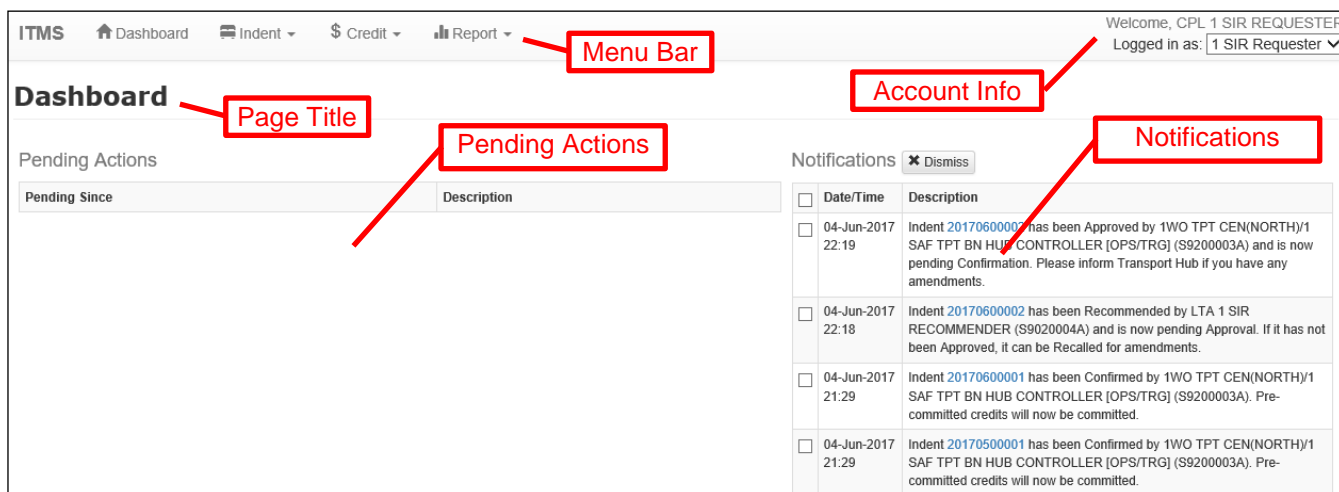
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2. Table of Content

3.3.2   Notifications

The notification screen as shown in the top right of the page display a list of messages to alert the users on certain events of the system. These messages consist a summary of a certain events and the date/time of the event. Users may click on the available links if they need more information on the events. After reading the messages, user can choose to clear the messages by selecting the notification's checkbox and click on "Dismiss".

3.4   Date Components

Date component can be found when user is required to select date. This component may require user to input date, date and time, a range of date or a range of date and time. The system may limit the user on the range they can select due to the constraints as shown below. Date/Time that are grey are not selectable. For selecting a range of date/time, user need to click "Apply" to reflect on the input.

3.5   Quick Search Components

Quick Search is a component that allows the system to suggest a list of possible matching results based on the input based on the first 2 letters that is keyed in. Note that this component only serve to minimize typo and speed up form filling, it does not comes with any business validation. In ITMS, the Quick Search components are mainly used for the following input:

-   Personnel NRIC No. or Rank/Name
-   Vehicle No. or Type Name
-   Unit Code or Name

4   Credit Management User Guide

The Transport Credit Management is for managing the allocation and transfer of transport credits to from HQ to individual customer units to put up indents for their operational and training needs.

4.1   HQ Transport Credit Allocation/Transfer

Access Rights*: Transport Credit Account Manager*

This function allows Transport Credit Account Manager to allocate/ transfer credits to all divisions / formations for the work year.

Step 1: Go to Credit > Credit Allocation/ Transfer (HQ Transport).

Step 2: Select 'Work Year. Proceed to **step 3** if the total credits have not been set. Skip to **step 5** if the total credits have been set.

Step 3: Click 'Set Total'.

Step 4: Enter 'Total Credits' and click 'OK'.

Step 5: An Overview of the Credit Allocation (HQ Transport) page.

5.1: Shows the total credits allocated and the remaining credits available to be allocated.

5.2: Shows the initial provision for each division/formation for the work year.

5.3: Shows the credits transfer transaction between division/formation. Each transfer will add a column to the right.

5.4: Shows the latest provision for each division/formation for the work year.

5.5: Shows the total credit balance remaining for each division/formation for the work year. A negative balance means the division/formation's units used advance credits while division/ formation has not been allocated credits.

5.6: Shows the total credits for each column.

5.7: Click 'Reset Total' to reset total credits shown on **5.1**.

Step 6: Enter credits at '+/-' for each division/formation. To transfer, enter '- credit' for the division/formation user wish to transfer out and enter '+ credit' for the division/formation user wish to transfer in.

Step 7: Click 'Allocate/Transfer Credits' to confirm allocation or 'Clear' to reset credits entered on **step 6** to 0.

4.2   Div/Fmn Credit Allocation/Transfer

Access Rights: *Transport Credit Account Manager, Div/Fmn Transport Credit Controller*

This function allows Transport Credit Account Manager or HQ Transport to allocate/transfer credits to all units under their division/formation.

Step 1: Go to Credit > Credit Allocation/ Transfer (Div/Fmn).

Step 2: Select 'Work Year'. If division/formation has not been allocated credits, the page will display 0 for 'Allocated Credits' and 0 for 'Remaining Credits' as shown in the screenshot below.

2.1: Shows the total credits allocated and the remaining credits available to be allocated.

2.1: Shows the latest provision for each unit.

2.1: Shows the balance remaining for each unit.

Step 3: Enter 'Initial Provision' for each unit. With initial provision set, user can enter '- credit' for the unit user wish to transfer out and enter '+ credit' for the unit user wish to transfer in.

Step 4: Click 'Allocate/Transfer Credits' to confirm allocation or 'Clear' to reset credits entered on **step 3** to 0.

4.3   Credit Movement

This function provides accountability to user with all credit movement records.

4.3.1   Search & View Unit's Credit Statuses

Access Rights: Transport Credit Account Manager, Div/Fmn Transport Credit Controller

This function allows user to view their unit credit statuses such as committed, penalty, balance, refunded.

Step 1: Go to Credit > Search Credit Statuses.

Step 2: Click 'Advanced Search' to access more search fields, if required.

Step 3: Click 'Search' to search based on your combination of search fields. The result will be listed below.

Step 4: Click 'Clear' to reset the search fields and result, if required.

Step 5: Click on the 'Unit' hyperlink to view credit movement (**4.3.2**).

Step 6: Click 'Download to Excel' to download searched result.

4.3.2 View Credit Movements

Access Rights: Transport Credit Account Manager, Div/Fmn Transport Credit Controller

This function allows user to view detailed credit movement in the unit.

Step 1: Click on the 'Indent ID' hyperlink to view more details on the indent.

Step 2: Click 'Download to Excel' to download unit credit movement.

4.4 Credit Refund

Access Rights: Transport Credit Account Manager

This function allows Transport Credit Account Manager to refund penalty committed in all indents.

Step 1: Go to Indent > Refund Penalty Credit.

Step 2: Enter 'Work Year'.

Step 3: Enter 'Customer Unit'.

Step 4: Enter 'Credits to Return'. The maximum amount to refund is shown by 'Total Penalty Credits' above.

Step 5: Enter 'Remarks' to provide reason(s) or remark(s).

Step 6: Click 'Return Credit' to confirm action or 'Clear' to reset fields.

4.5   Approve/Reject Transport Credit Refund

Access Rights: Transport Credit Account Manager

This function allows user to approve credit refund for indent(s) with unfulfilled task(s).

Step 1: Go to Indent > Credit Refund Approval.

Step 2: Select 'Approve All' or 'Reject All' if user wish to approve/ reject all the indents. If user approve all indents, 'Approve All' button will be lit up in green. If user reject all indents, 'Reject All' button will be lit up in red. User can also select individual 'Approve' or 'Reject' under the 'Indent ID'. Should there be a mix of approve and reject, neither 'Approve All' or 'Reject All' will lit up.

Step 3: Select 'Approve' or 'Reject' if user wish to complete each action individually. Enter a valid reason beside the 'Reject' button if user chose to reject.

Step 4: 'Confirm Decision' button will show the total number of indents to be recommended or rejected. Click 'Confirm Decision' and a pop up will appear.

4.6 Approve/Reject Central Vote

Access Rights*: Transport Credit Account Manager*

This function allows user to approve indent usage on central vote credits.

Step 1: Go to Indent > Central vote Approval.

Step 2: Select 'Approve All' or 'Reject All' if user wish to approve/ reject all the indents. If user approve all indents, 'Approve All' button will be lit up in green. If user reject all indents, 'Reject All' button will be lit up in red. User can also select individual 'Approve' or 'Reject' under the 'Indent ID'. Should there be a mix of approve and reject, neither 'Approve All' or 'Reject All' will lit up.

Step 3: Select 'Approve' or 'Reject' if user wish to complete each action individually. Enter a valid reason beside the 'Reject' button if user chose to reject.

Step 4: 'Confirm Decision' button will show the total number of indents to be recommended or rejected. Click 'Confirm Decision' and a pop up will appear.