|  |
| --- |
| User Manual |
| Cylinders & Orders Management System (COMS) Project |
| The user manual provides the information necessary for the user to effectively use the cylinders & orders management system (COMS). |

**This page has been intentionally left blank**

|  |  |  |  |
| --- | --- | --- | --- |
| Filing Reference : | GG/COMS/TU.1/1 | | |
| Document Title: | User Manual | | |
| Version : | 1 | | |
| Prepared by : | Koh Ming Jin | | |
| Date Created : | Tuesday, December 1st, 2011 | | |
|  |  | |  |
| Approved by : | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  |
|  | Maung Tin Kyaw Oo | | Date |
|  | Technical Lead | |  |
| Authorized by : | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  |
|  | Tran Ba Tien | | Date |
|  | Project Manager | |  |
| **© 2011 Hoang Kim Joint Stock Company.**  **The information contained in this document is the property of Hoang Kim Joint Stock Company. The contents must not be reproduced, wholly or in part, for purposes other than for which it has been supplied, without the prior permission of Hoang Kim Joint Stock Company, or, if it has been furnished under contract to another party, as expressly authorised under that contract. Hoang Kim Joint Stock Company shall not be liable for any errors or omissions.** | |  | |

**Document Reference:** GG/COMS/TU.1

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Version** | **Date** | **Author** | **Remarks** | **Authorised by** |
| 1.0 | 01/12/2011 | Koh Ming Jin | Updated administration use cases |  |
|  |  |  |  |  |

**Cylinders & Orders Management System (COMS)  
 Project**

**User Manual**

**Distribution:**

|  |  |  |
| --- | --- | --- |
| **Name** | **Department** | **Organisation** |
| Tran Ba Tien | SE18-Team2S | MTech (ISS) |
| Maung Tin Kyaw Oo | SE18-Team2S | MTech (ISS) |
| Chang Parkk Khiong Alvin | SE18-Team2S | MTech (ISS) |
| Koh Ming Jin | SE18-Team2S | MTech (ISS) |
| Junaith | SE18-Team2S | MTech (ISS) |
| Phyo Phyo Lwin | SE18-Team2S | MTech (ISS) |

Table of Contents

[1. INTRODUCTION 1](#_Toc314271737)

[Purpose 1](#_Toc314271738)

[Audience 1](#_Toc314271739)

[Organisation 1](#_Toc314271740)

[References 2](#_Toc314271741)

[2. USER INSTRUCTIONS 3](#_Toc314271742)

[2.1. Getting Started 3](#_Toc314271743)

[2.2. User Login 4](#_Toc314271744)

[2.3. Manage Employee User Account 4](#_Toc314271745)

[ Create Employee User Account 4](#_Toc314271746)

[ Edit Employee User Account 4](#_Toc314271747)

[ Delete Employee User Account 5](#_Toc314271748)

[2.4. Manage Roles & Rights 5](#_Toc314271749)

[ Create New Role 5](#_Toc314271750)

[ Edit Role 6](#_Toc314271751)

[2.5. Manage Employee-Role Relationship 6](#_Toc314271752)

[ Assign roles for new employees 6](#_Toc314271753)

[ Edit roles for existing employees 7](#_Toc314271754)

[ Approve submitted role request for existing employees 7](#_Toc314271755)

[ Reject submitted role request for existing employees 7](#_Toc314271756)

[2.6. Manage Sales Order 8](#_Toc314271757)

[ Create New Sales Order 8](#_Toc314271758)

[ Edit Sales Order 8](#_Toc314271759)

[ Delete Sales Order 9](#_Toc314271760)

[2.7. Manage Error 9](#_Toc314271761)

[ Create Error Code 9](#_Toc314271762)

[ Edit Error Code 10](#_Toc314271763)

[ Delete Error Code 10](#_Toc314271764)

[2.8. Manage Performance Formula 10](#_Toc314271765)

[2.9. Manage Workflow / Steps / Workflow Step Relations 12](#_Toc314271766)

[2.10. Update Cylinder Status 14](#_Toc314271767)

[2.11. Manage Cylinder Production Process 16](#_Toc314271768)

[ Start Cylinder Production Process 16](#_Toc314271769)

[ Stop Cylinder Production Process 16](#_Toc314271770)

[2.12. Change Cylinder Priority 17](#_Toc314271771)

[2.13. Print Cylinder Information Report 17](#_Toc314271772)

[2.14. View Cylinder Progress Logs 18](#_Toc314271773)

[2.15. View Order Progress Logs 18](#_Toc314271774)

[2.16. View Workflow Queues 19](#_Toc314271775)

[2.17. Export Cylinder Queues 20](#_Toc314271776)

# INTRODUCTION

Hoang Kim Joint Stock Company is one of the leading providers of printing cylinders in Vietnam. They are currently using the latest technologies from Germany and Japan, and their client bases include various Vietnamese corporations as well as across Southeast Asia.

The company would like to have an integrated IT system that can:

* Manage the main manufacturing process, i.e. sales orders and cylinders.
* Benchmark employees’ performance to calculate bonuses.
* Give management reporting tools for daily operations.
* Be easy to maintain and to add new features in the future.

## Purpose

The purpose of this document is to provide the system instructions that will enable the users to use the cylinders and orders management system.

## Audience

The intended readers of this manual are the users, who are responsible for using this system. This document should provide all the necessary instructions.

## Organisation

The cylinders and orders management system is a MS Windows application.

The instructions of how to use the following functions of cylinders and orders management system are described in Section 2:

* User Login
* Manage Employee User Account
* Manage Roles
* Manage Rights
* Manage Employee-Role Relationship
* Manage Role-Access Rights Relationship
* Manage Sales Order
* Manage Error
* Manage Performance Formula
* Manage Workflows
* Manage Steps
* Manage Workflow-Step Relationship
* Update Cylinder Status
* Manage Cylinder Production Process
* Change Cylinder Priority
* Print Cylinder Information Report
* View Cylinder Progress Logs
* View Order Progress Logs
* View Workflow Queues
* Export Cylinder Queues

## References

To fully understand the background to this project, the reader should also be familiar with:

1. COMS Project Plan, reference GG/COMS/MP.1/2, version 2.0, dated 1 February 2011.
2. COMS Quality Plan, reference GG/COMS/MQ.1/3, version 3.0, dated 31 December 2011.
3. COMS User Requirement Specifications, reference GG/COMS/TS.1/1.1, version 1.1, dated 1 February 2011.

# USER INSTRUCTIONS

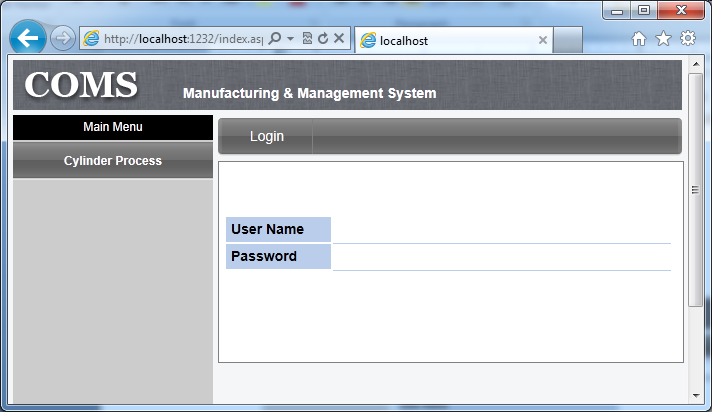
Cylinder and orders management system (COMS) is designed to run under Windows. This section describes the procedure of executing the functions in Cylinder and orders management system and it presumes that the users know the basics of using Windows.

## Getting Started

1. Double click on the COMS icon.



1. The COMS application window is displayed



## User Login

The aim of this use case is to allow user to login

1. When users start the program, the y will be directed to the login page
2. Enter User Name and Password
3. Click on Login button
4. If it is successful, the user will be directed to the admin page.
5. If it is not successful, an error message will be displayed.

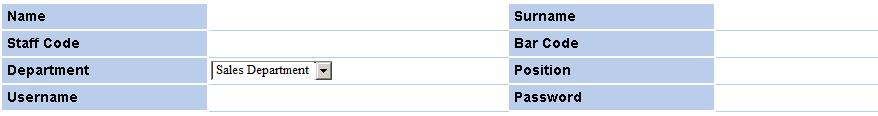
## Manage Employee User Account

The aim of this use case is to manage the employee information.

### Create Employee User Account

1. In admin module, select the **Employee Menu**
2. Enter/select the following information in the respective textboxes or drop down list

* Name
* Surname
* Staff code
* Bar code
* Department (drop down)
* Position
* Username
* Password



1. Click on **Save** button
2. A portion of the employee information will be shown in the **employee list table**.



### Edit Employee User Account

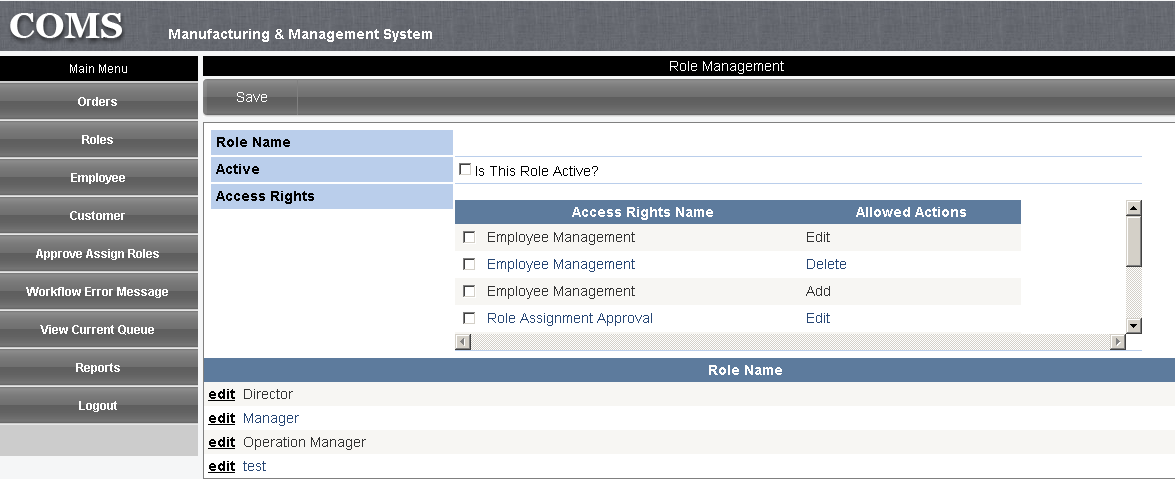
1. In admin module, select the **Employee Menu**
2. Click on search to retrieve all employee information or enter the staff code to retrieve a particular employee information
3. Identify the employee information to be edited and click on its **edit link** (left side of the employee information)
4. Enter/select the updated employee information in the respective **text boxes or drop down list**
5. Click on **Save** button
6. A portion of the employee information will be shown in the **employee list table**.

### Delete Employee User Account

1. In admin module, select the **Employee Menu**
2. Click on search to retrieve all employee information or enter the staff code to retrieve a particular employee information
3. Identify the employee user account to be deleted and check on its **checkbox** (left side of the employee information)
4. Click on **Delete** button
5. The selected employee user account will be deleted from the **employee list table**.

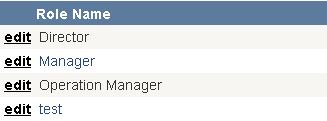
## Manage Roles & Rights

The aim of this use case is to manage the role information for the employees



### Create New Role

1. In admin module, select the **Role Menu**
2. Enter the new **Role Name** in the **text box** besides the label “Role Name”
3. Check the checkbox to activate the role name after creation
4. Assign the access rights by checking the various access rights name
5. Click on **Save** button
6. The new role name will be shown in the **role list table**.

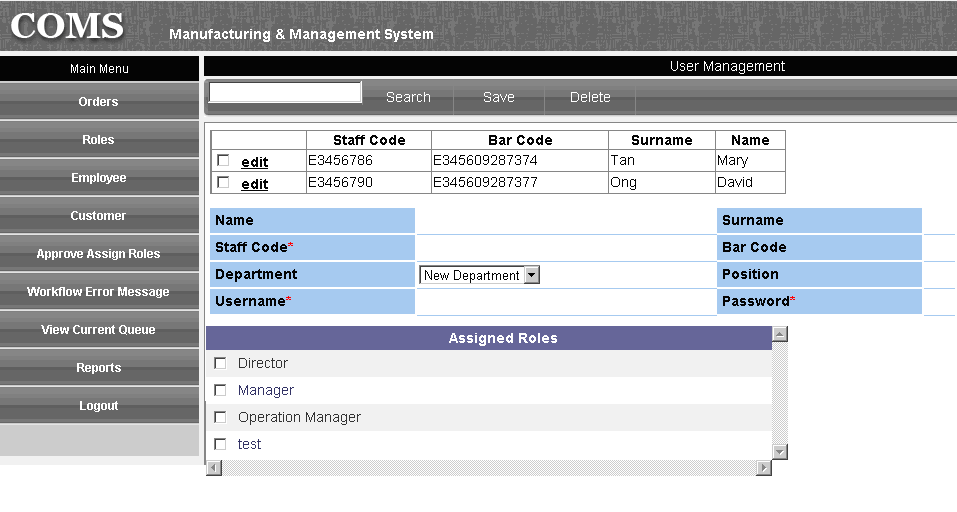


### Edit Role

1. In admin module, select the **Role Menu**
2. In the role list table, identify the error code to be edited and click on the **edit link** (left side of the role name)
3. Enter the updated role information in the respective sections – role name, active and access rights.
4. Click on **Save** button
5. The updated role information will be shown in the role list table.

## Manage Employee-Role Relationship

The aim of this use case is to assign the respective roles to the existing/new employees.

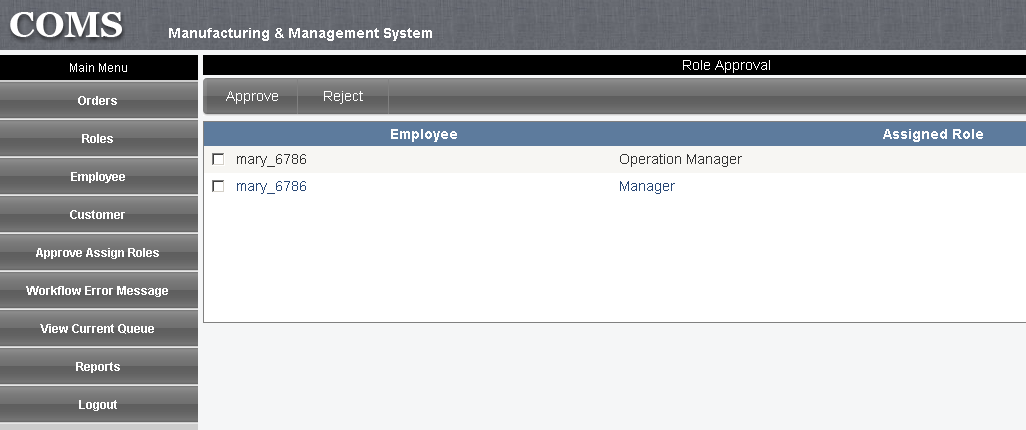


### Assign roles for new employees

1. In admin module, select the **Employee Menu**
2. Enter the employee information in the respective **fields** (refer to create employee user account in the manage employee user account section)
3. In the **Assigned Roles** table, check the respective account(s) to assign the roles to the employee
4. Click on **Save** button
5. The role(s) assigned to the employee will be pending for approval. Once approved, it will be reflected in the employee details.

### Edit roles for existing employees

1. In admin module, select the **Employee Menu**
2. Retrieve the employee information by searching using the staff code or just click on the search to retrieve all employee information
3. Click on the edit link to view the selected employee details
4. In the **Assigned Roles** table, check or uncheck the respective account(s) to assign/remove the roles of the employee
5. Click on **Save** button
6. The role(s) assigned to the employee will be pending for approval. Once approved, it will be reflected in the employee details.



### Approve submitted role request for existing employees

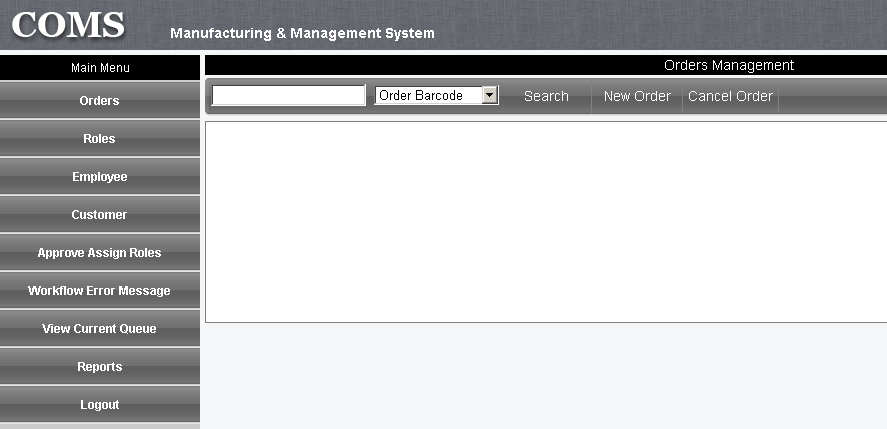
1. In admin module, select the **Approve Assign Roles**
2. The submitted role requests will be listed in a table
3. Check on the checkbox for those roles which the approver would like to approve
4. Click on **Approve** button
5. The role(s) assigned to the employee will be approved and will be reflected in the employee details.

### Reject submitted role request for existing employees

1. In admin module, select the **Approve Assign Roles**
2. The submitted role requests will be listed in a table
3. Check on the checkbox for those roles which the approver would like to reject
4. Click on **Reject** button
5. The role(s) assigned to the employee will be rejected and will not be reflected in the employee details.

## Manage Sales Order

The aim of this use case is to manage the sales order information

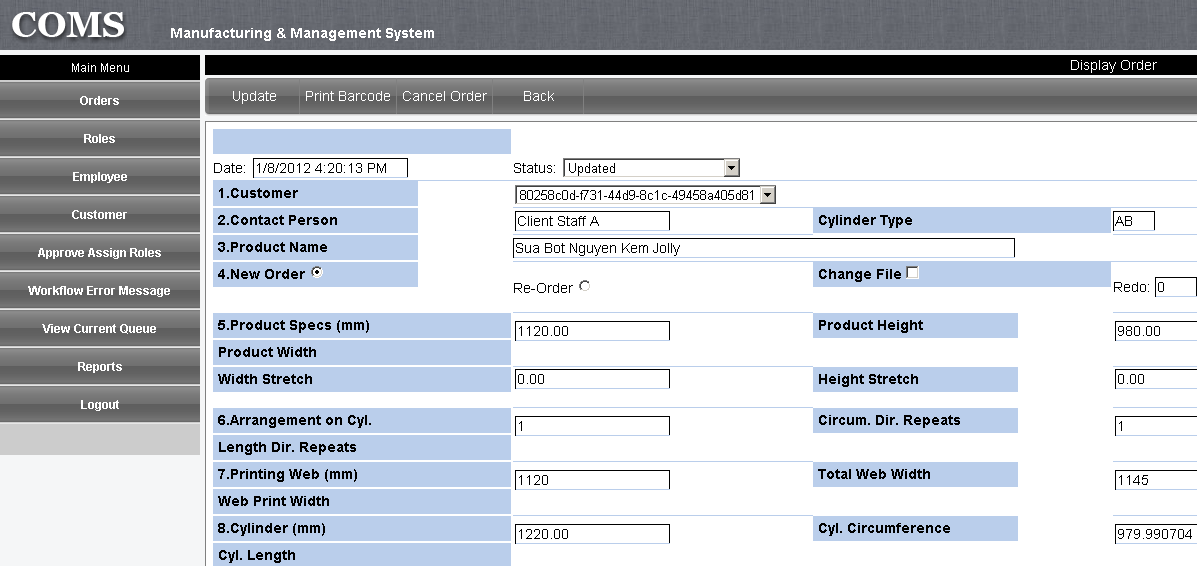


### Create New Sales Order

1. In admin module, select the **Orders Menu**
2. Click on the **New Order** button to create a new order



1. Enter the sales order information.



1. Click on **Save** button
2. The new sales order will be shown in the **sales order list table**.

### Edit Sales Order

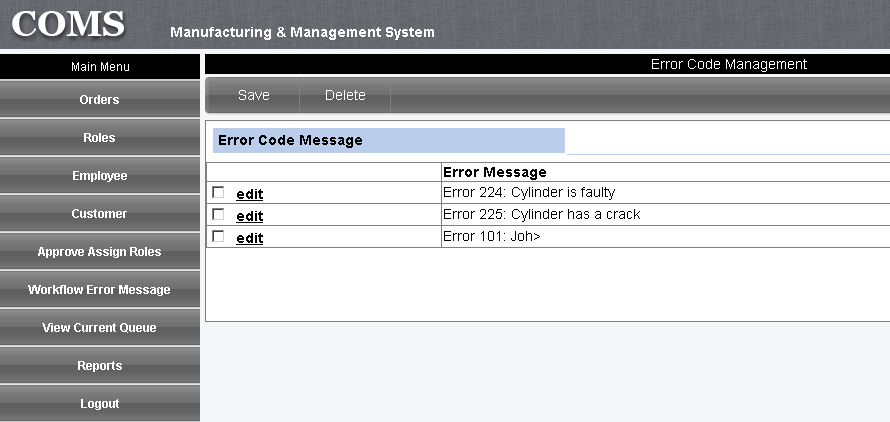
1. In admin module, select the **Orders Menu**
2. Click on search to display all orders or key in a particular order code to retrieve the particular order
3. Identify the sales order to be edited and click on the **order code**
4. Enter the updated sales order information in the **respective fields**.
5. Click on **Update** button
6. The updated sales order will be shown in the sales order list table.

### Delete Sales Order

1. In admin module, select the **Orders Menu**
2. Click on search to display all orders or key in a particular order code to retrieve the particular order
3. Identify the sales order to be deleted and click on the order code link
4. The details of the sales order will be shown
5. Click on **Cancel** button
6. The selected sales order code will be deleted from the **sales order list table**.

## Manage Error

The aim of this use case is to manage the error codes for the cylinders

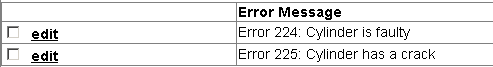


### Create Error Code

1. In admin module, select the **Workflow Error Message Menu**
2. Enter the new error code information in the **text box** besides the label “Error Code Message”



1. Click on **Save** button
2. The new error code will be shown in the **error code table**.



### Edit Error Code

1. In admin module, select the **Workflow Error Message Menu**
2. Identify the error code to be edited and click on its **edit link** (left side of the error code)
3. Enter the updated error code information in the **text box** besides the label “Error Code Message”
4. Click on **Save** button
5. The updated error code will be shown in the error code table.

### Delete Error Code

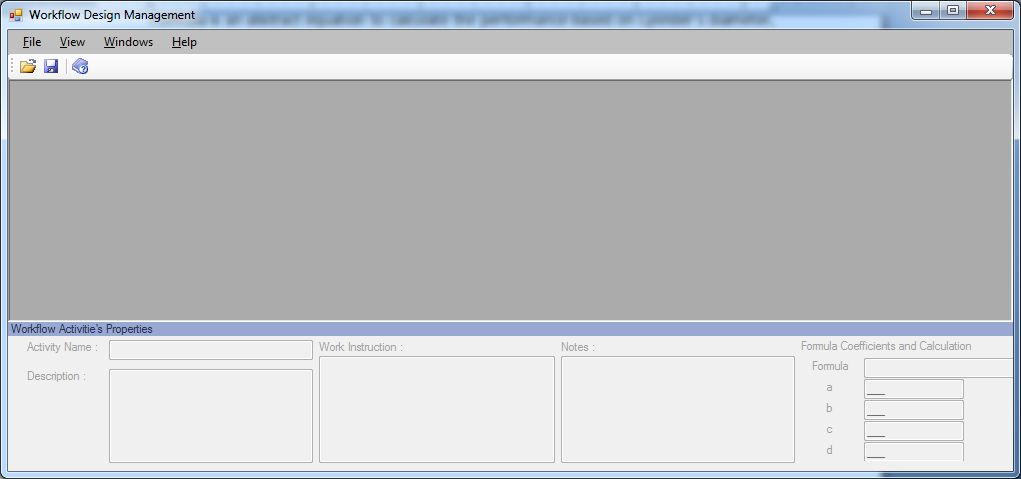
1. In admin module, select the **Workflow Error Message Menu**
2. Identify the error code to be deleted and check on its **checkbox** (left side of the error code)
3. Click on **Delete** button
4. The selected error code will be deleted from the **error code table**.

## Manage Performance Formula

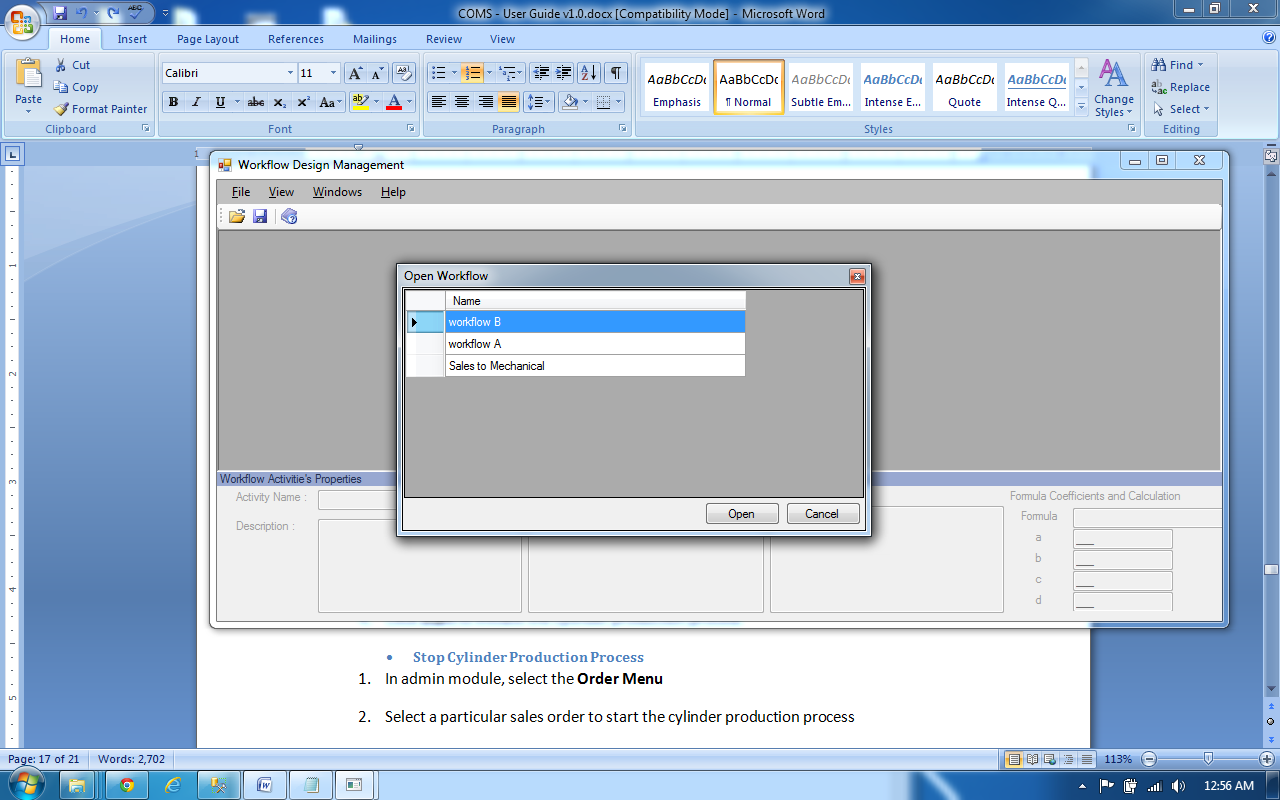
Administrator who have AccessRights to manage workflow and steps can manage the performance formula for each steps which workers has to work on.

Formula is an abstract equation to calculate the performance based on Cylinder’s diameter, surface area, user defined four coefficients. All these formula and coefficients are defined as properties/attributes for each step.

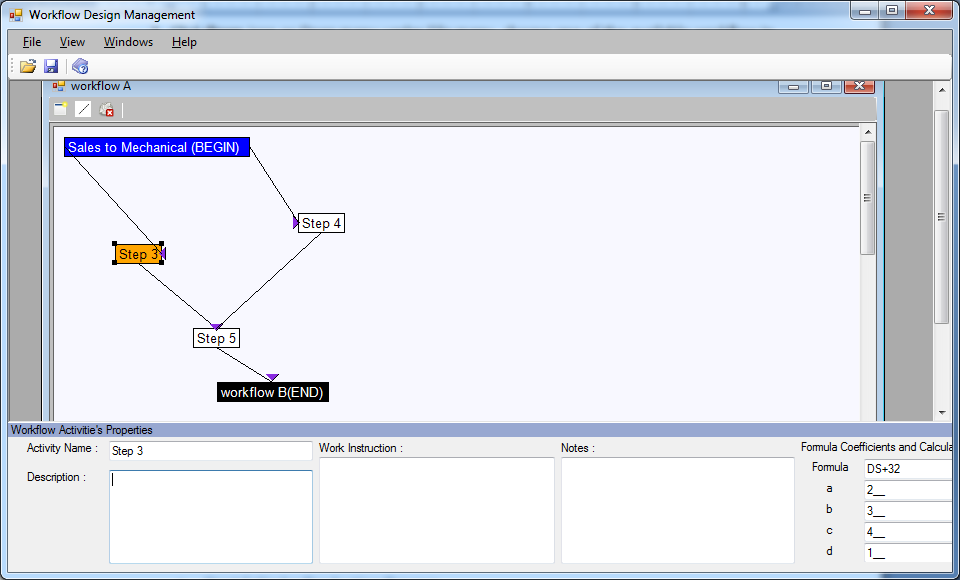
At anytime, if the formula has changed or coefficients value has changed, administrator can step up a new formula on workflow manager designer. Workflow management application is a thick client and Rich Graphical user interface to flexibily design the workflow steps.



* + - 1. Go to Start Menu->COMS Workflow Designer
      2. Run **WorkflowManagement** Application
      3. Click **Open** icon or Open menu under File menu, choose one of the available workflow in the system.



* + - 1. Once the available workflow has been selected and click Open. Workflow designer will show Workflow Canvas as below.



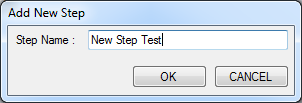
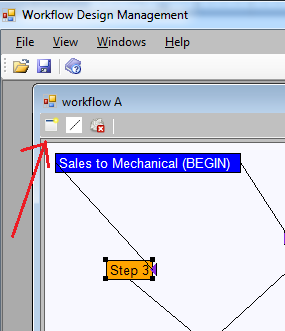
* + - 1. Workflow diagram consist of basic components called Steps, Begin Node and End Node.  
         Begin Node shows which is the previous workflow before this workflow is start. End Node shows where will the cylinder send once this workflow has reach to the end step. Starting Node is shown in Blue color and End Node is shown is Black color. Working step are normal steps which is shown by white color and when selected, will show as Gold color.
      2. Click on a Step (**Step 3**), the **Workflow Activity Properties** will become enable.
      3. Type different formula in Formula field, change coefficients in a,b,c,d coefficients fields.
      4. You can now click Save icon button on the toolbar to save the formula changes.

## Manage Workflow / Steps / Workflow Step Relations

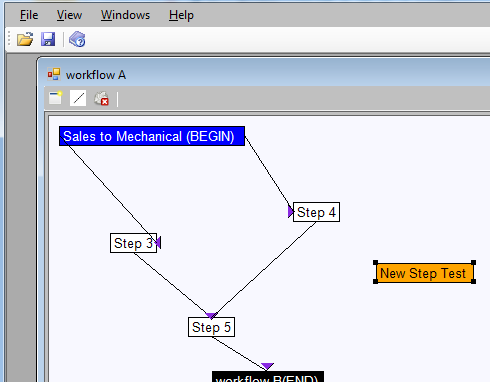
All the workflow are static as they are the path between department to department movement flow for cylinders to pass through during production management processes.

All the steps inside workflow can be added , edited or deleted.

Open one of the available workflow, and create a new step by clicking on **Add New Step** icon on the tool bar.

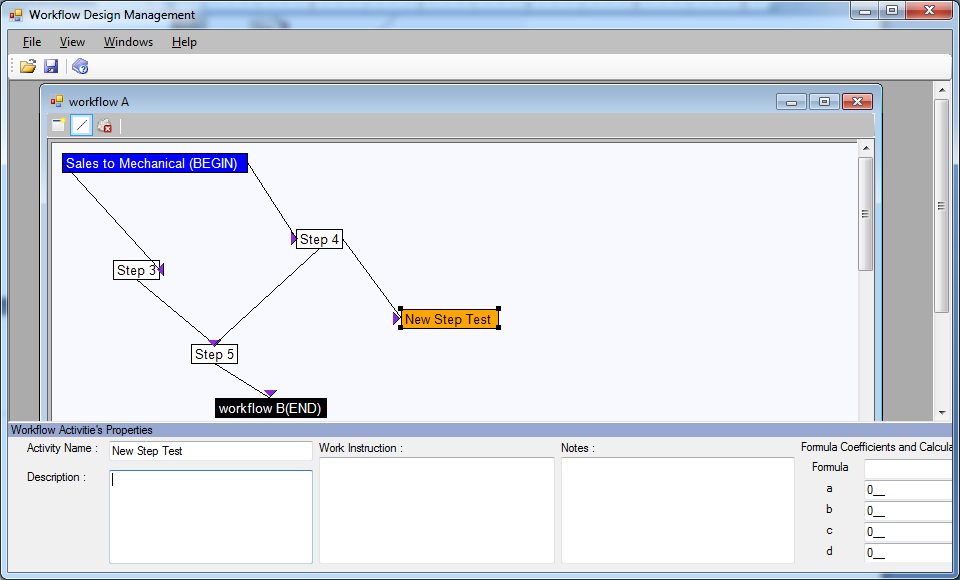


Type the step name and click Ok. Then click on the Canvas on the place where user want to place the step box.



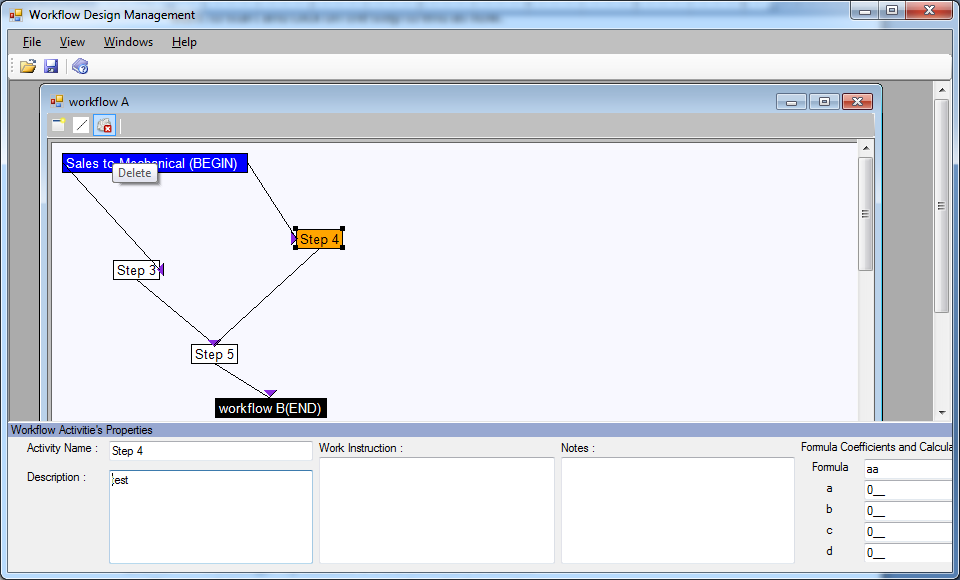
Once the step is place on the canvas, user can drag and drop the step anywhere on the canvas as pleased.

Now click on **Add New Connector** icon button on the toolbar. Then click on the Step you want to start and click on the step to end as flow.



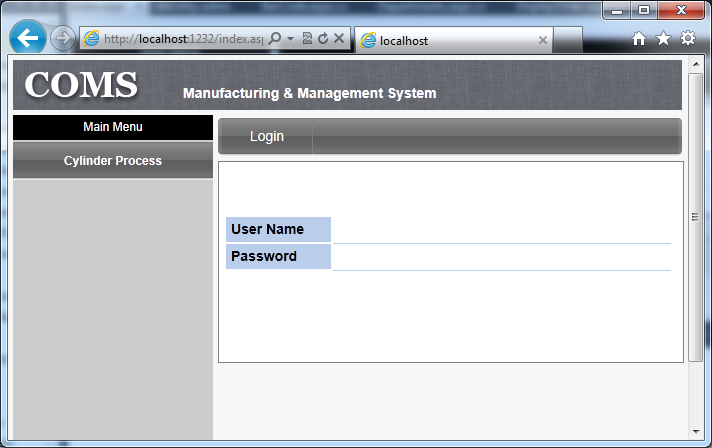
To change the Step name, click on the Step then type in the fields available in **Workflow Activities’ Properties** panel at the bottom of the screen.

To remove or retire the Step from the workflow, click on the step, which make the step to be selected. Then click on Delete button on the toolbar on the canvas window.

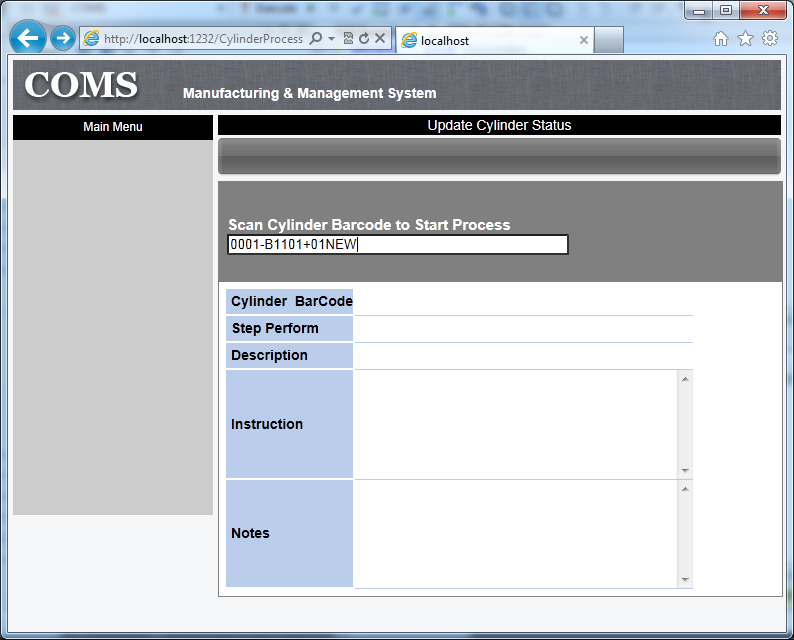


The Arrows in the workflow designer shows all the relationship between each and every steps participating in a workflow.

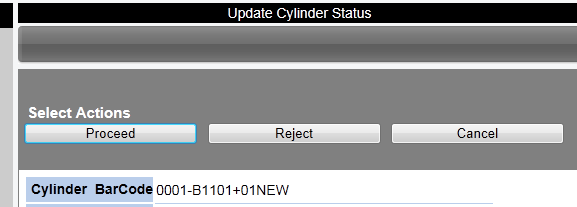
## Update Cylinder Status



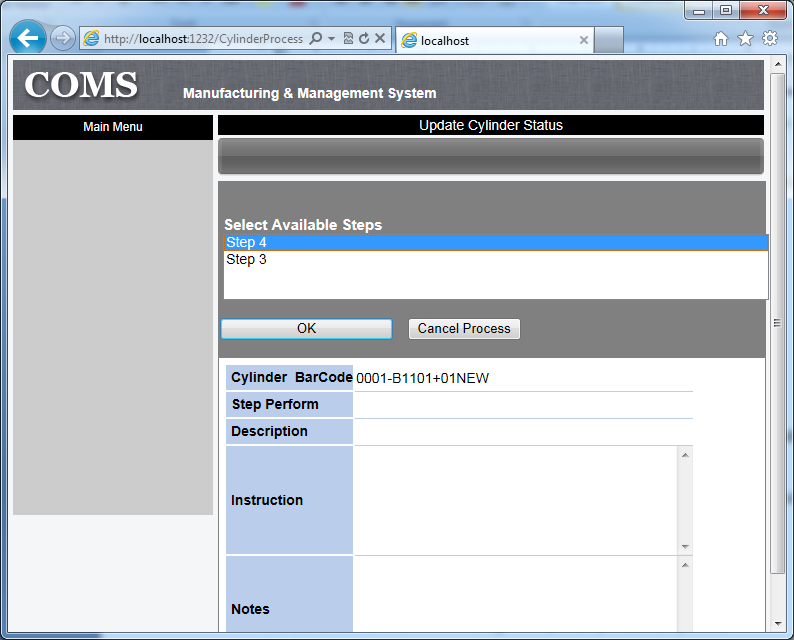
* + - 1. To start Cylinder update process. On the client machine at the workers terminal, open the internet browser. It will show Login page. As Production users do not need to login, just click on **Cylinder Process** command on main menu. User will be presented with **Update Cylinder** pageto update the work status for cylinder on his terminal.



* + - 1. Once the production user is inside the update cylinder status page, he can scan the cylinder barcode to start the process.
      2. Once Cylinder Barcode has been scanned, there will be 3 options to choose from



* + - 1. To Cancel this process, select **Cancel.**
      2. To **Reject** the cylinder due to any other defects, choose **Reject.** Worker will need to give the reasons for rejection.
      3. If worker want to proceed with cylinder instead of Reject and Cancel, click on Proceed button. The system will show all the available steps to choose from which worker need to work on.



* + - 1. Once the worker has choosed the step to work on system will be ready for the worker to stop the process by rescanning cylinder barcode.
      2. Once cylinder barcode has been scanned, worker will need to scan or entered his employee barcode to record into the system about his performance. He can also do the damage report.

## Manage Cylinder Production Process

The aim of this use case is to manage the cylinder production process

### Start Cylinder Production Process

1. In admin module, select the **Order Menu**
2. Select a particular sales order to start the cylinder production process
3. The details of the selected order will be shown on the screen.
4. Click **Start** to initiate the cylinder production process

### Stop Cylinder Production Process

1. In admin module, select the **Order Menu**
2. Select a particular sales order to start the cylinder production process
3. The details of the selected order will be shown on the screen.
4. Click **Stop** to initiate the cylinder production process

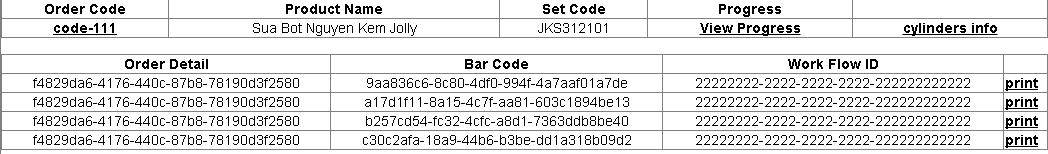
## Change Cylinder Priority

1. In admin module, select the Orders Menu
2. Click on search to display all orders or key in a particular order code to retrieve the particular order
3. Identify the sales order to be edited and click on the order code
4. Update the cylinder priority in the priority field.
5. Click on Update button
6. The cylinder priority for the cylinders in the selected order will be updated accordingly.

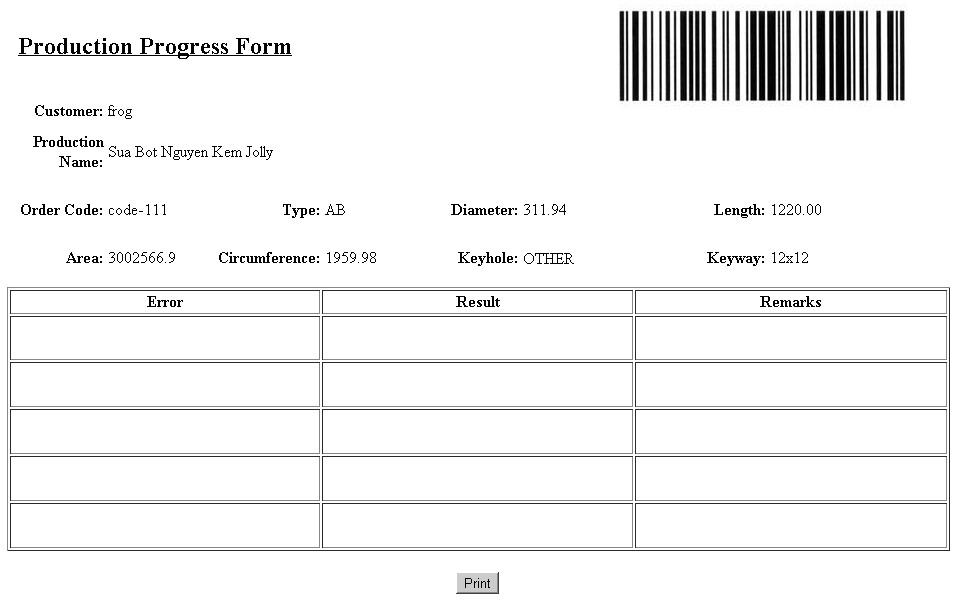
## Print Cylinder Information Report

The aim of this use case is to print the cylinder information report

1. In admin module, select the **Order Menu**
2. Click on the **cylinders info** link to view the cylinder information which are related to the selected order
3. The details of the cylinder information will be shown on the screen.



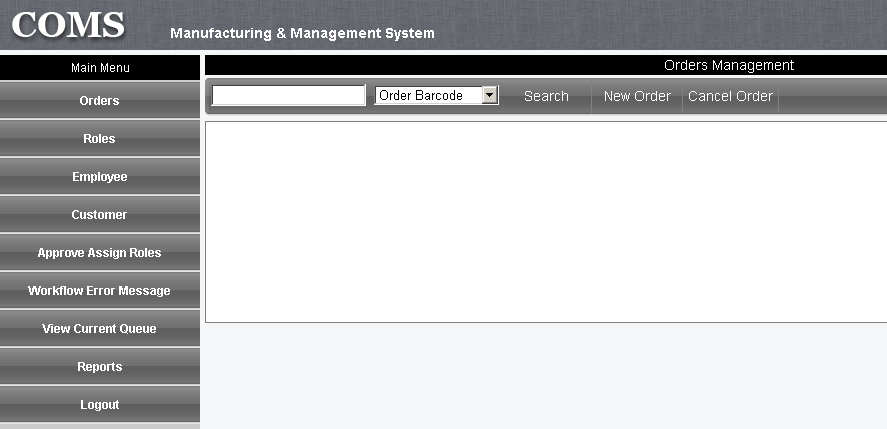
1. Click on the print link to initiate the printing process for a particular cylinder listed in the table



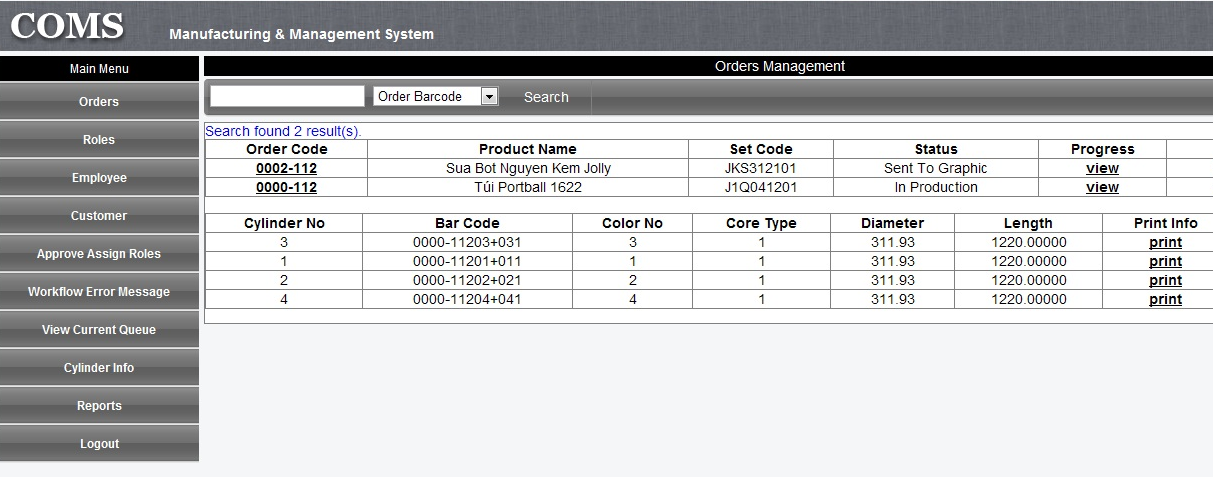
1. Click on print button to print the cylinder information

## View Cylinder Progress Logs

The aim of this use case is to view the cylinder process logs



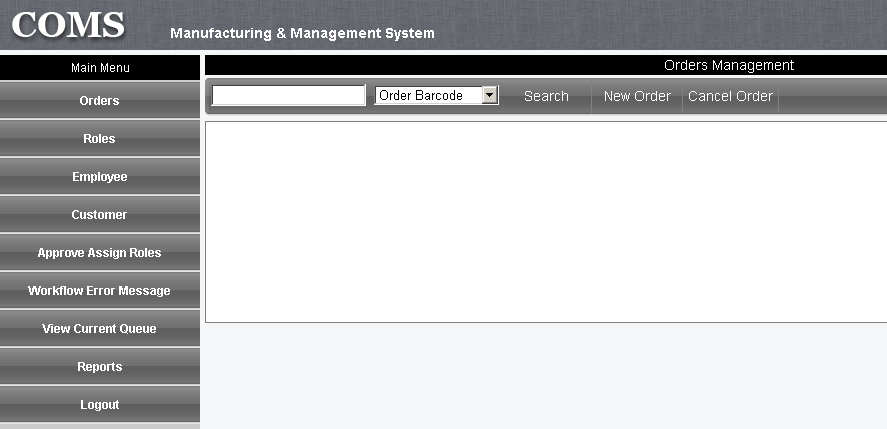
1. In admin module, select the Order Menu
2. Click on search to display all orders or key in a particular order code to retrieve the particular order
3. Select a particular order row and click on the **cylinders** link



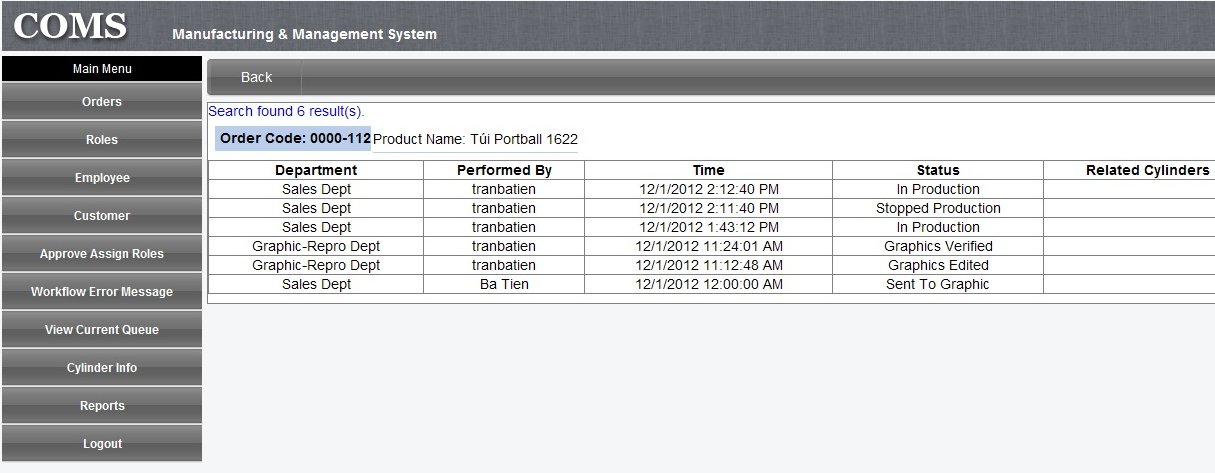
1. A new table containing the cylinder information will be displayed
2. The details of the cylinder progress will be shown on a pop up page.

## View Order Progress Logs

The aim of this use case is to view the order process logs



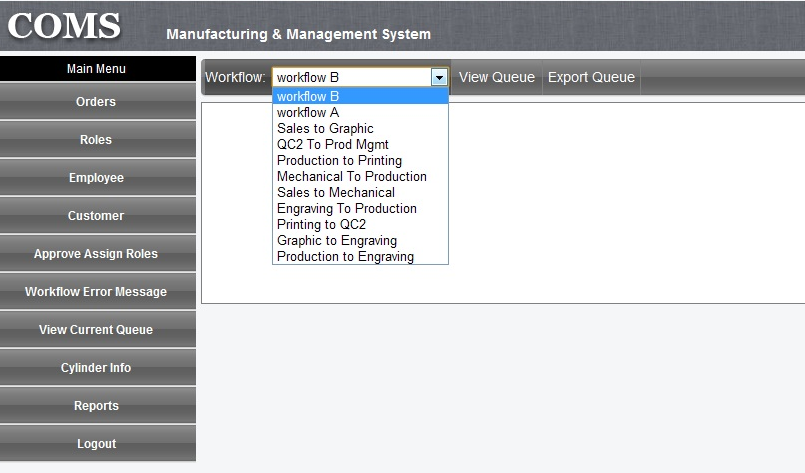
1. In admin module, select the **Order** Menu
2. Click on **search** to display all orders or **key** **in** a particular order code to retrieve the particular order
3. Select a particular order row and click on the “view” link, under the progress column
4. The details of the order progress will be shown on a pop up page.



## View Workflow Queues

The aim of this use case is to view the workflow queues

1. In admin module, select the **View Current Queue** Menu
2. Select the **workflow** in the dropdown list



1. Click on **view Queue**
2. The details of the workflow queues will be shown on the page.

## Export Cylinder Queues

The aim of this use case is to export the cylinder queues information

1. In admin module, select the View Current Queue Menu
2. Select the workflow in the dropdown list
3. Click on view Queue
4. The details of the workflow queues will be shown on the page.
5. Click on Export Queue
6. The cylinder queues information will be exported to an excel file. A new dialog box will pop out to allow user to save the cylinder queues information to the local drive.
7. Select the disk space and click on save.