6.3 User Manual (사용자 매뉴얼)

6.3.1 Overview (개요)

- Upon visiting the Financial Planning website, this user guide provides detailed instructions on how to utilize the features available to each role, including Admin, Accountant, Financial Staff

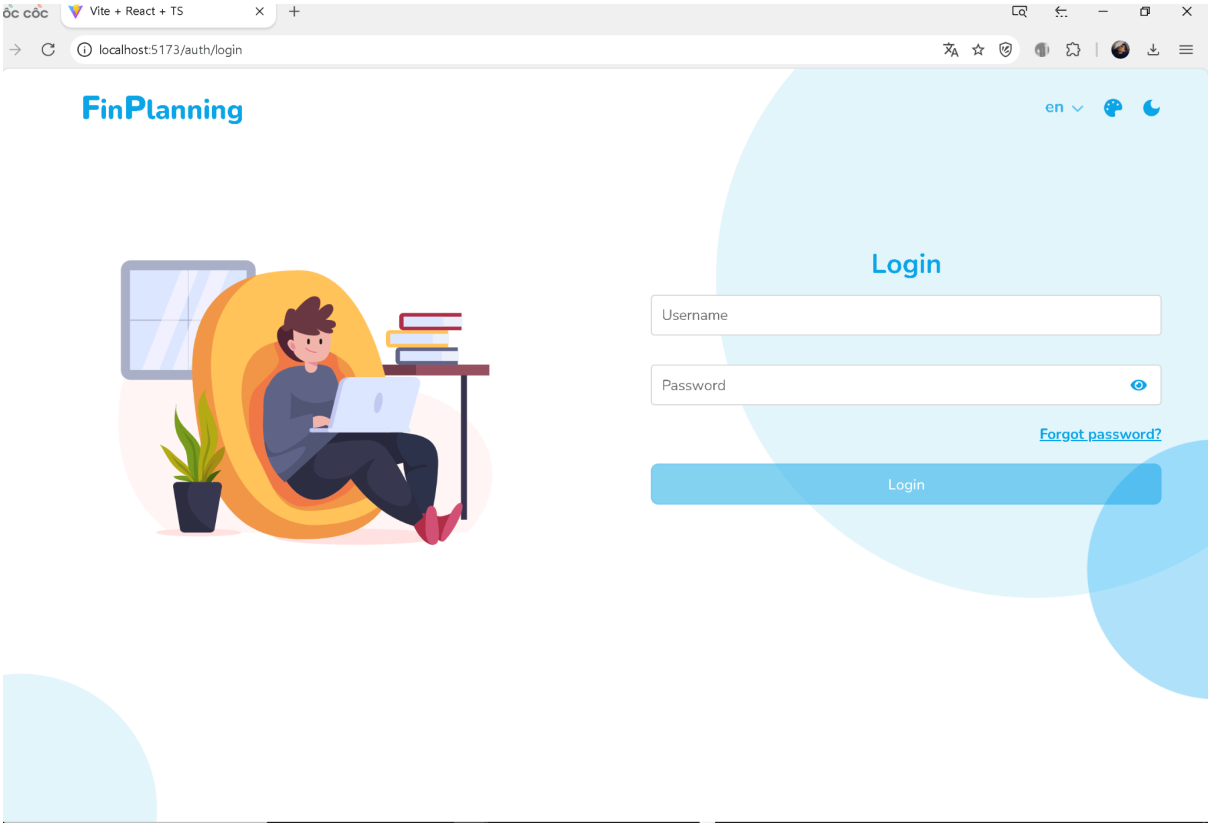
6.3.2 Workflow Authentication (인증 워크플로우)

[Describe the purpose of this workflow, draw workflow diagram and other relevant diagrams]

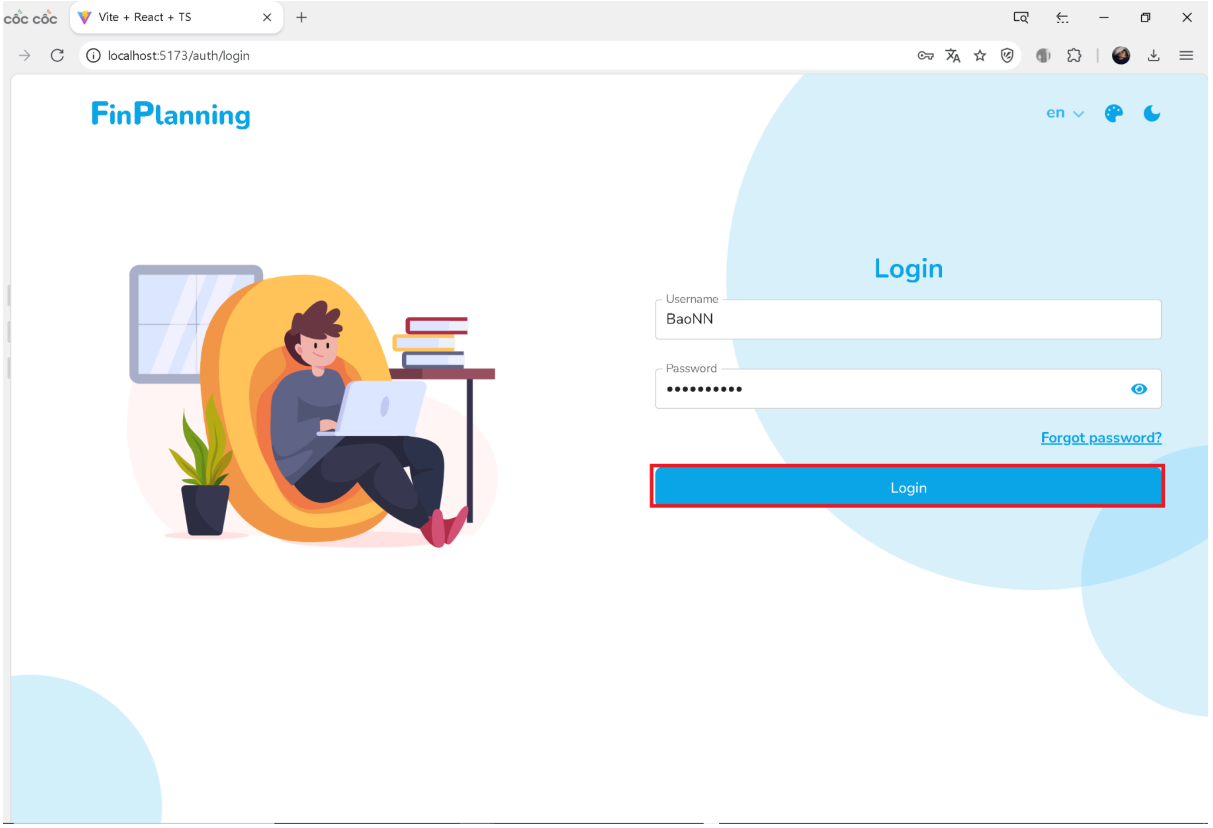
6.3.2.1 Login (로그인)

Role: Admin/ Accountant/ Financial Staff

Step 1: Access Login page



Step 2: Provide valid username and password and click Login



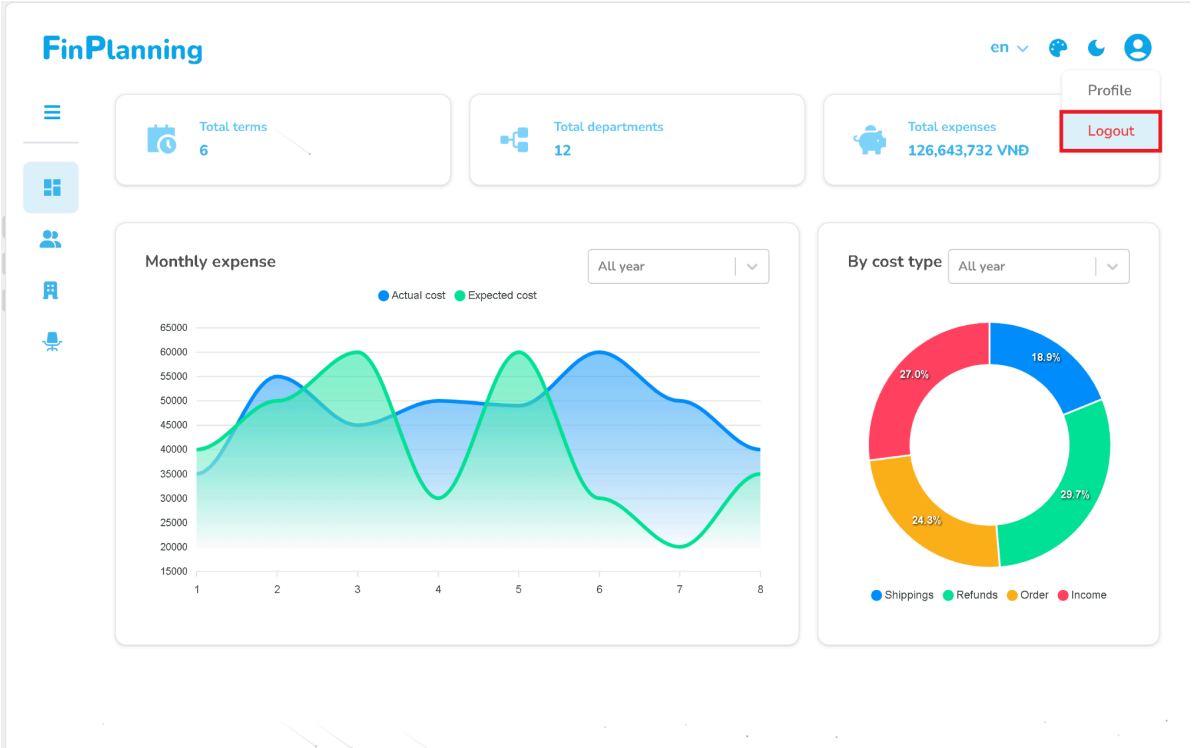
Step 3: The homepage will be shown if the application is succeed to authenticate with the server

***Note:** Homepage for each role will be displayed differently. (Refer to 6.3.3)

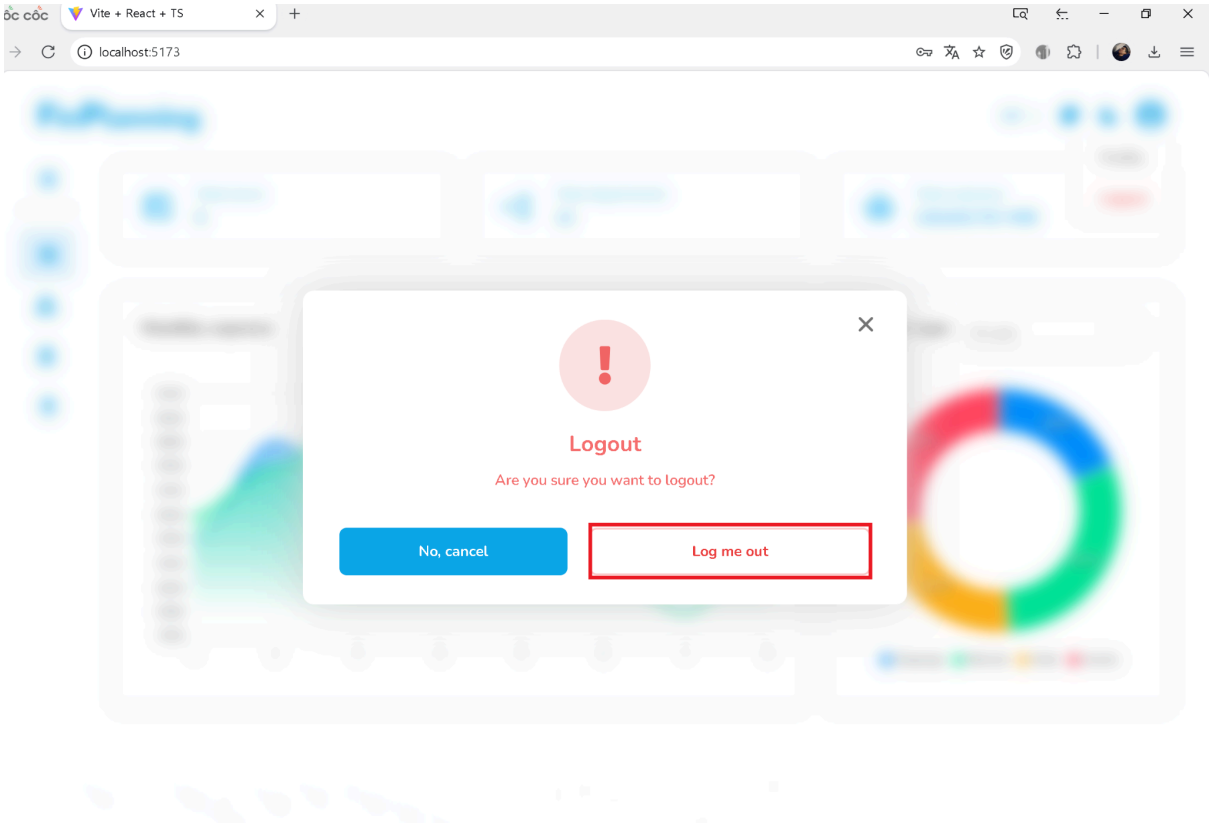
6.3.2.2 Logout (로그아웃)

Role: Admin/ Accountant/ Financial Staff

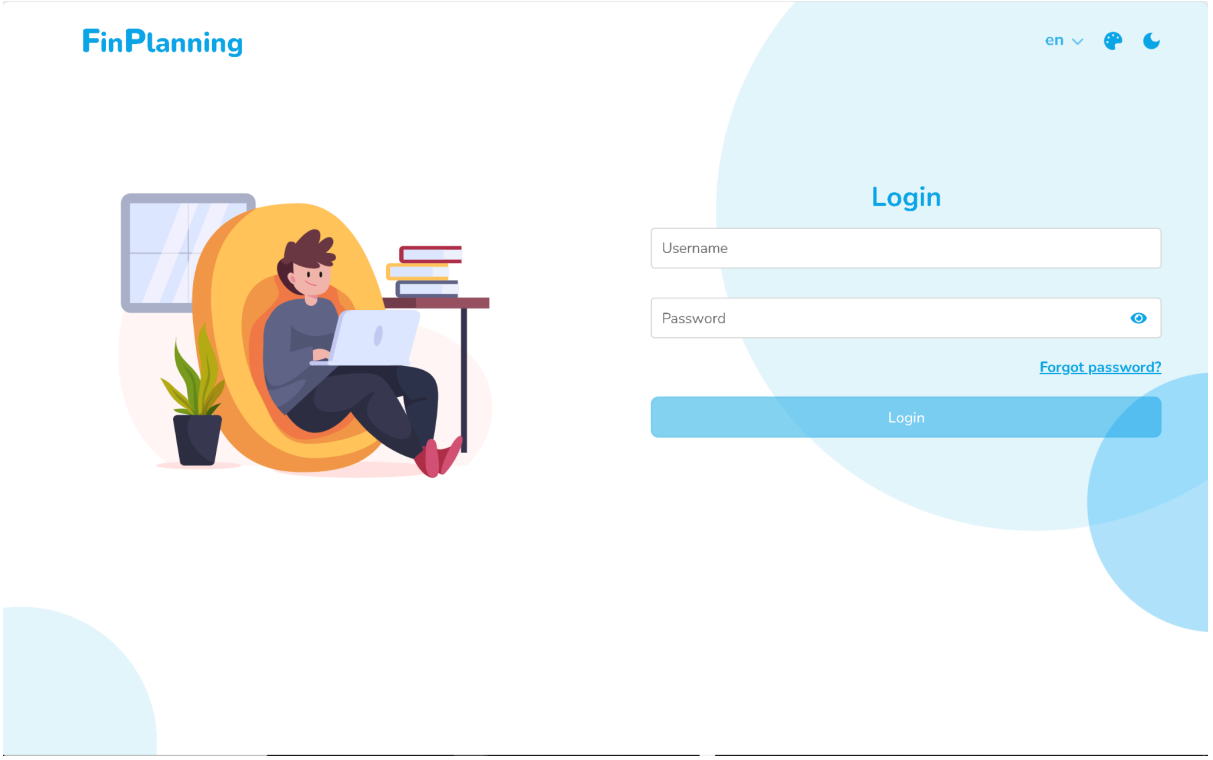
Step 1: On Header, click on Profile icon to display a dropdown menu. Click on Logout



Step 2: Click on “Log me out” for confirmation



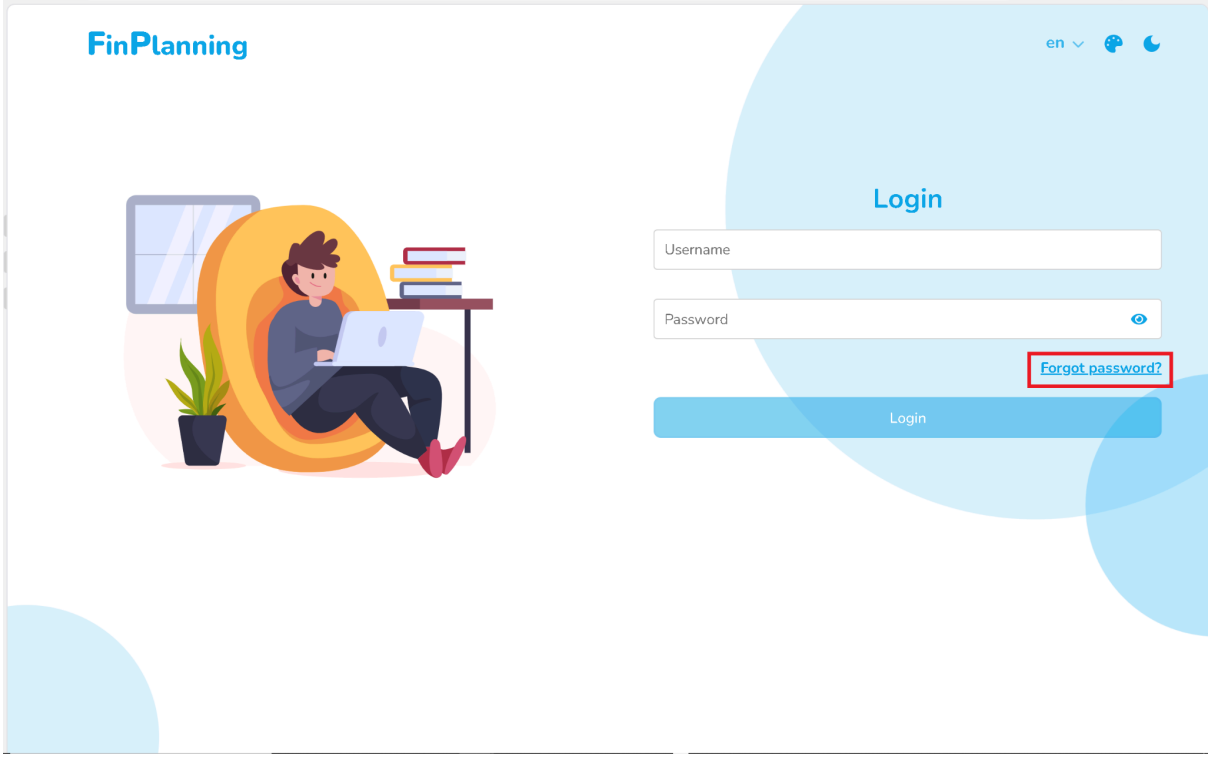
Step 3: User will be redirected to Login screen



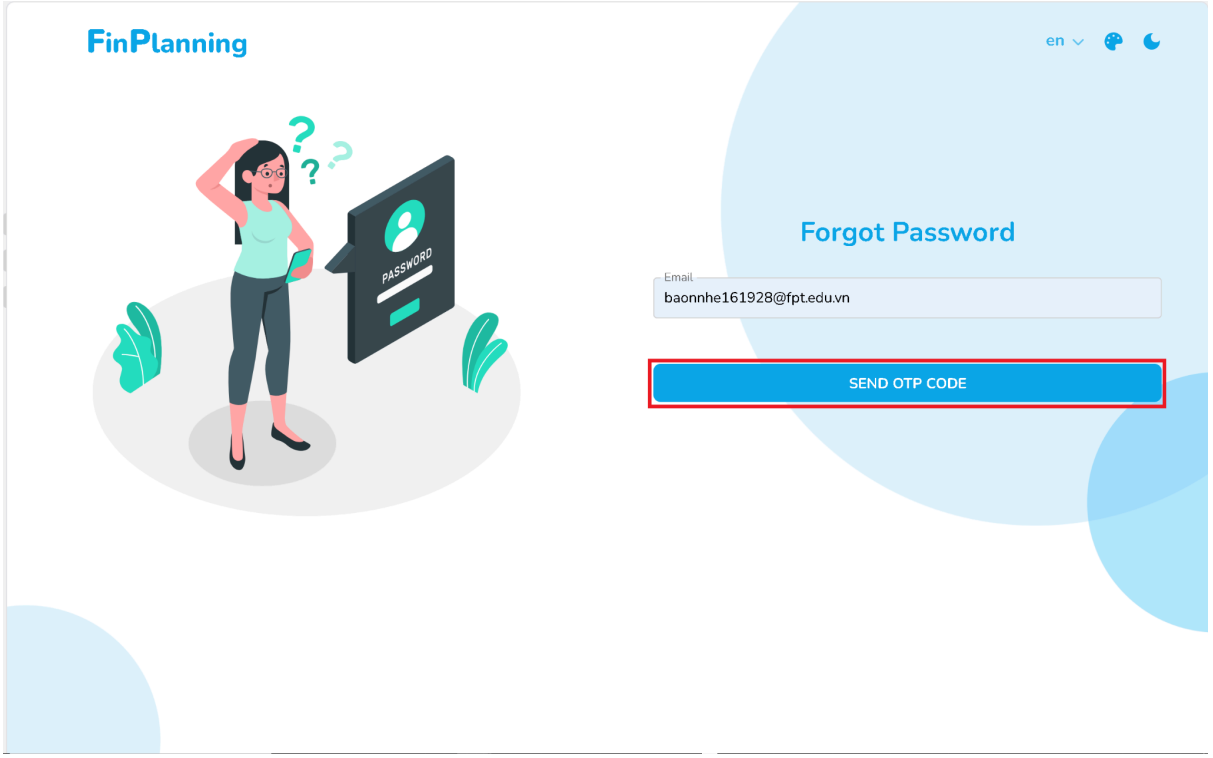
6.3.2.3 Forgot Password (비밀번호 찾기)

[Describe the detailed guides for the workflow by providing the brief description, step by step guides (attached with user interface) of how to use that function]

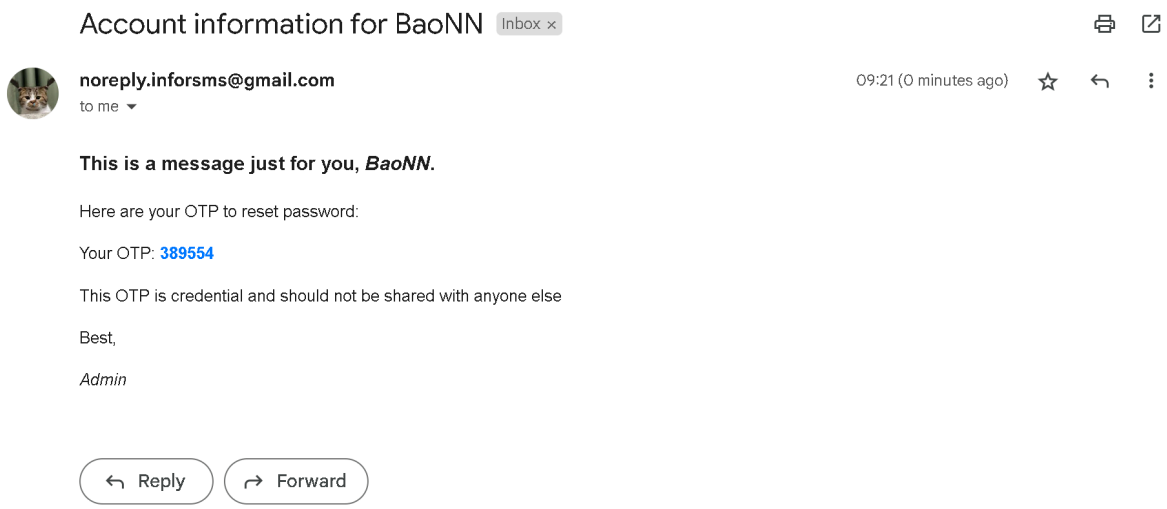
Step 1: From Login screen, click on “Forgot Password”



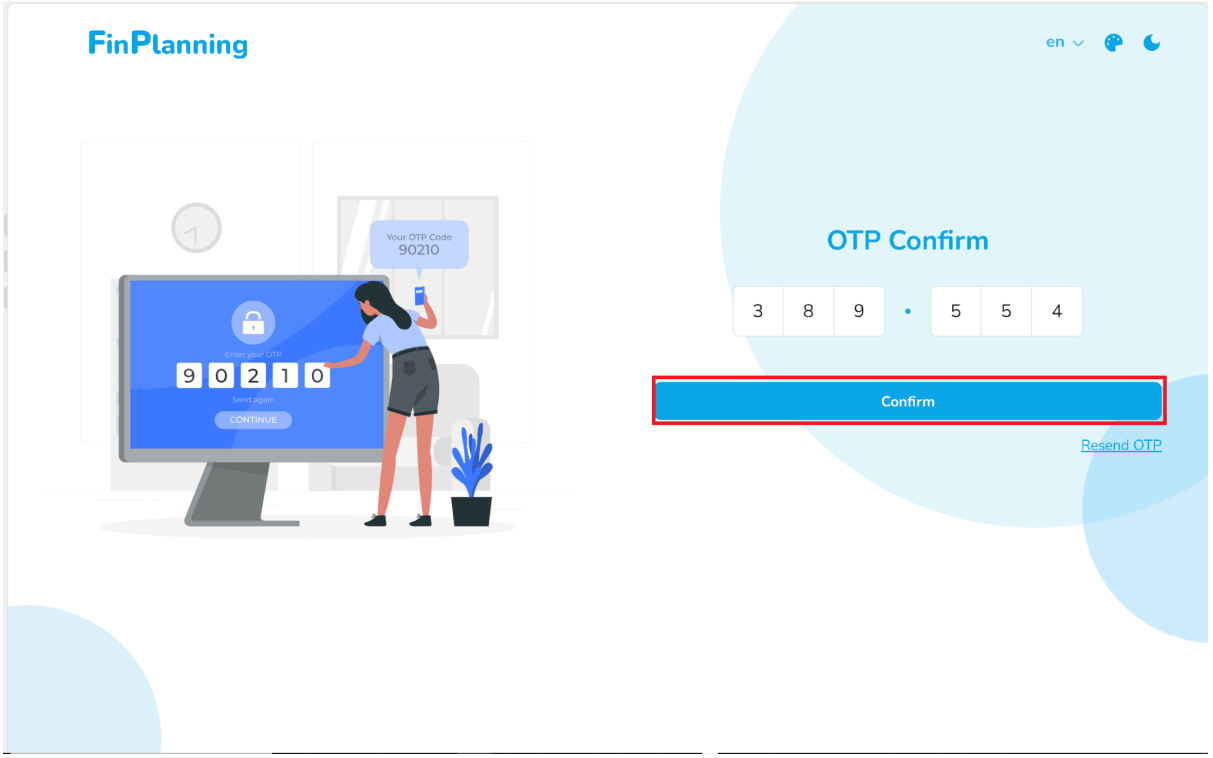
Step 2: After Forgot Password screen displayed, provide valid email address and click on “Send OTP Code”



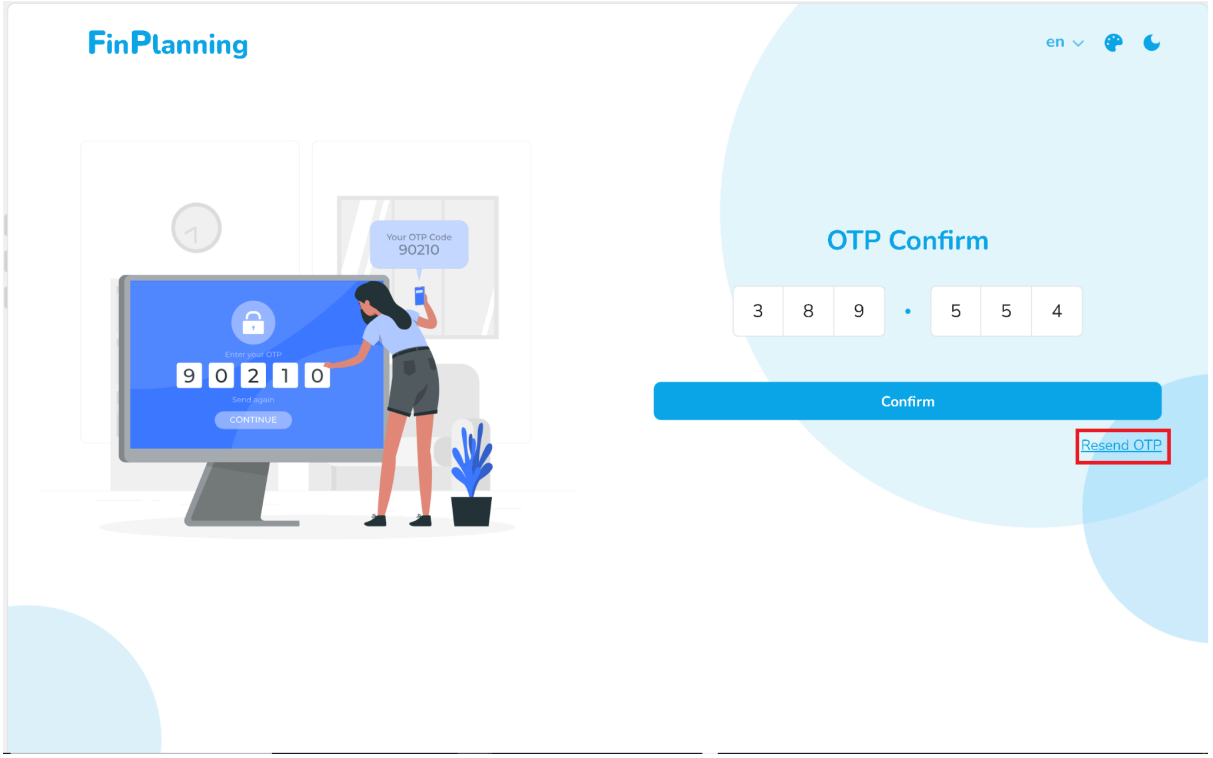
***Note:** User will receive an email for the OTP Code. Sample email below:



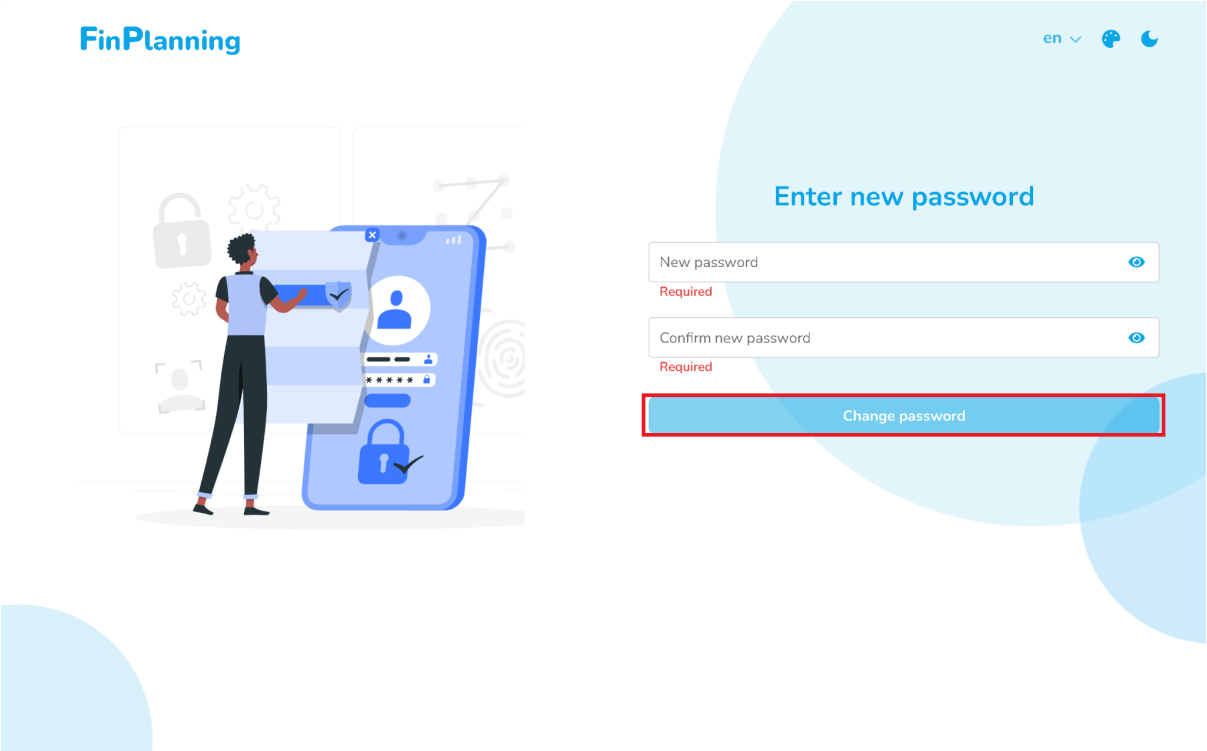
Step 3: The OTP Validation screen will be displayed, provide valid OTP code and click on “Confirm”



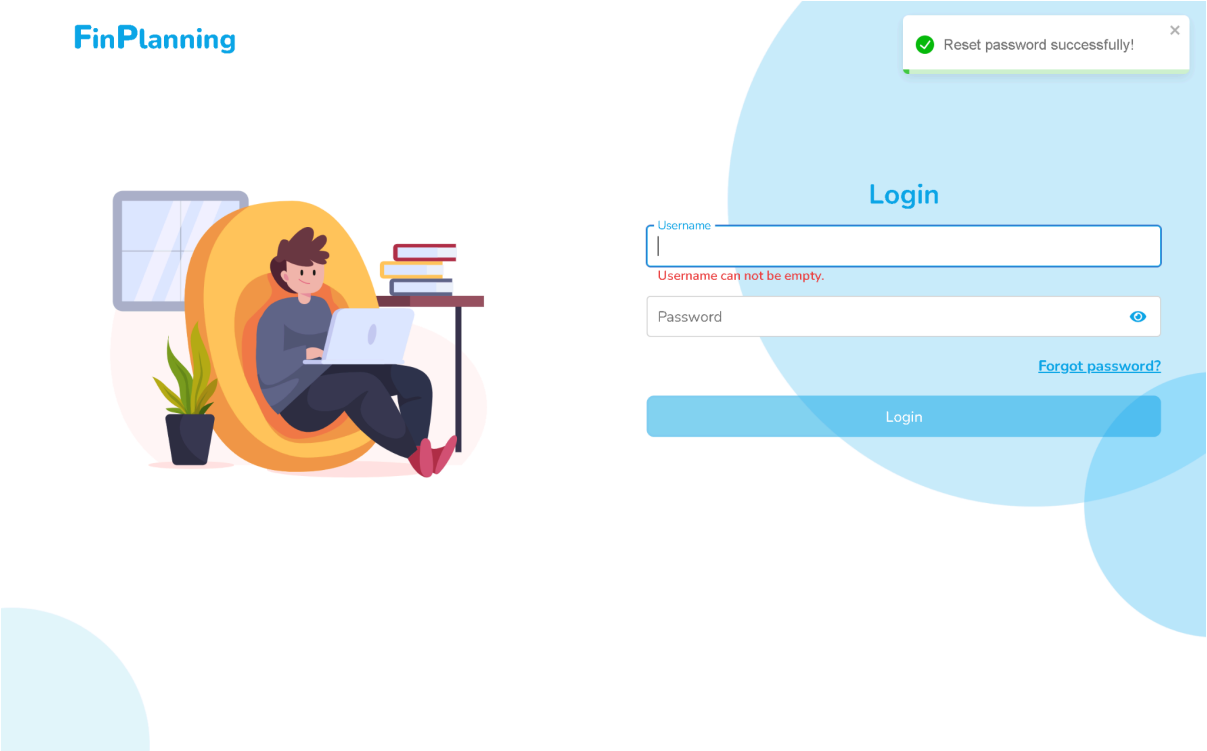
***Note:** User can click on Resend OTP if OTP Code is expired (Code is expired after 15 minutes)



Step 4: The Reset password screen will be displayed, provide valid new password and matching confirm password in the fields and click on “Change password”



Step 5: A success message will be displayed and user will be redirected to Login screen



6.3.3 Workflow Basic (기본 워크플로우)

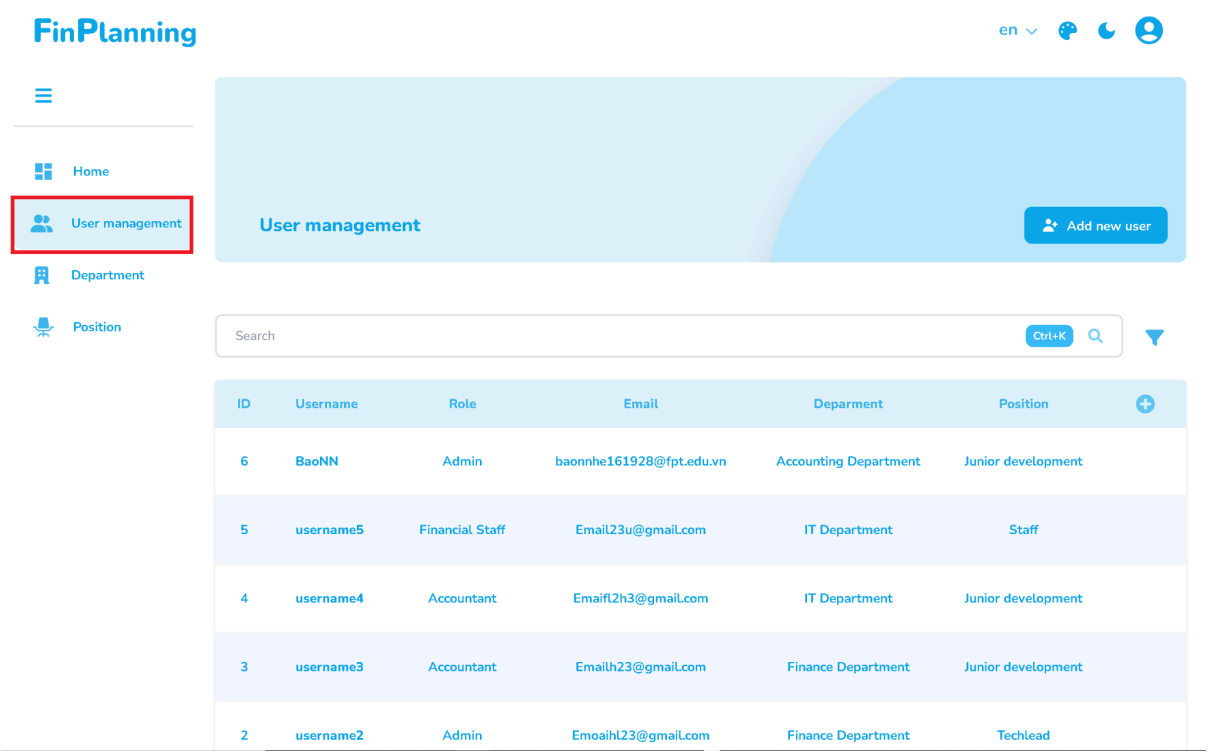
6.3.3.1 Home (홈)

6.3.4 Workflow User Management (사용자 관리 워크플로우)

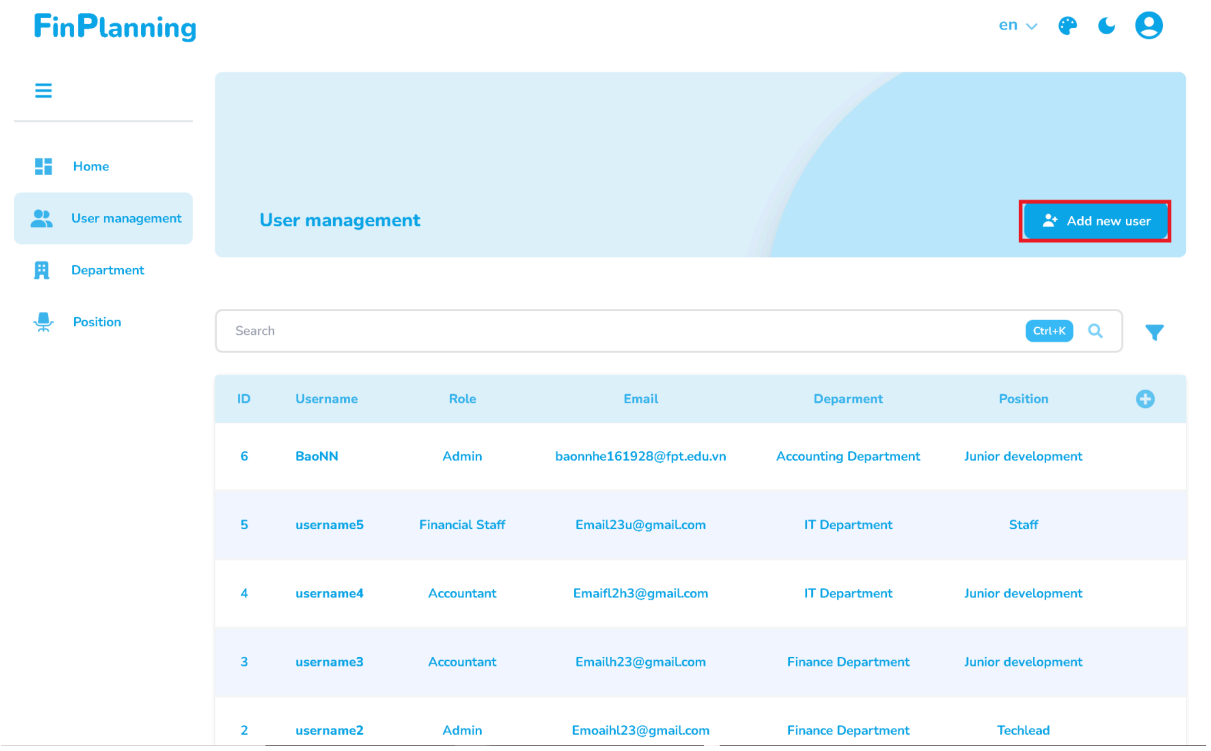
6.3.4.1 Create new user (새 사용자 생성)

Role: Admin

Step 1: User login using Admin account and click on User Management on sidebar after Home screen is displayed

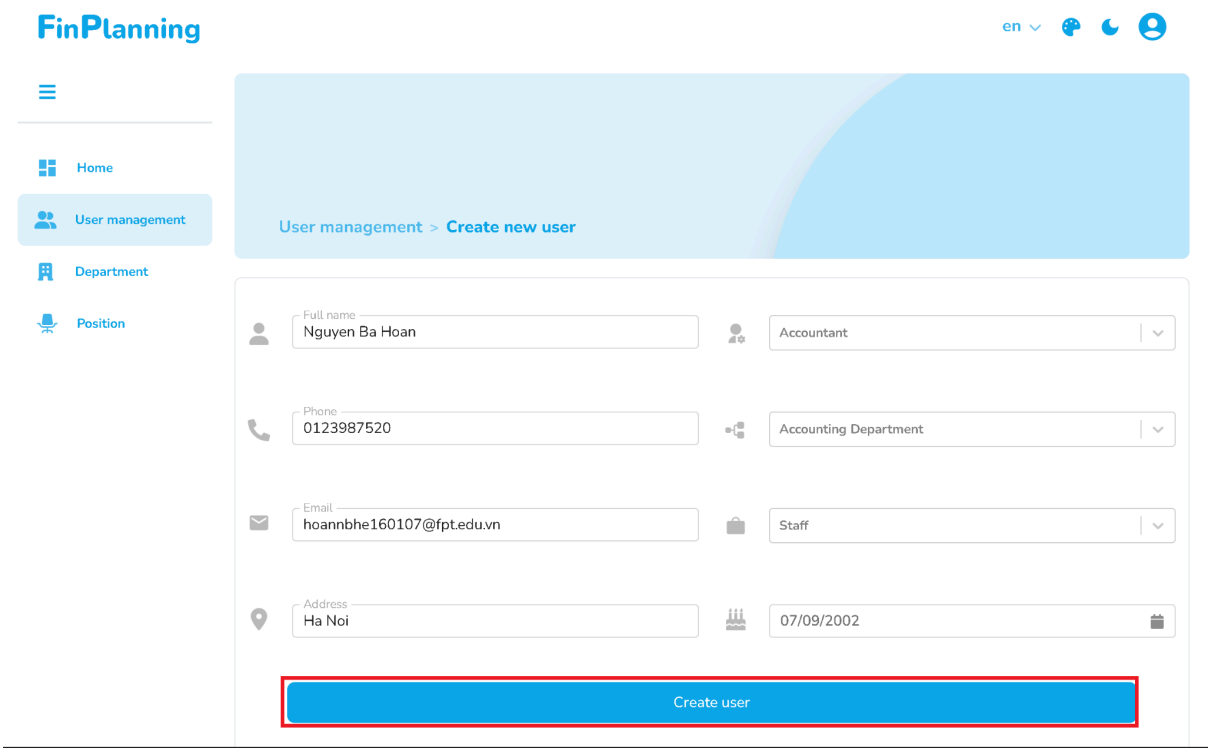


Step 2: Click on “Add new user” or press **Ctrl + ‘+’**

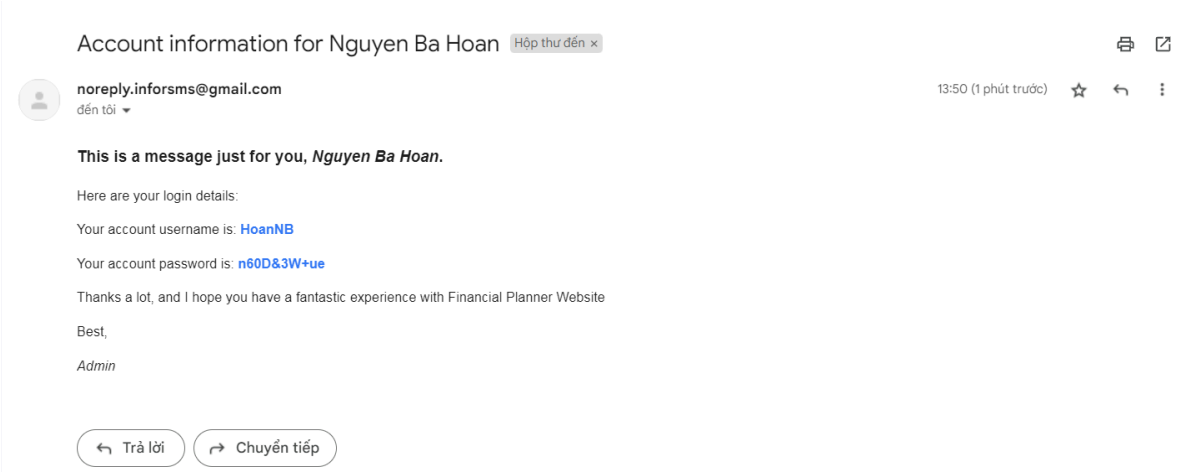


***Note:** Users can right click on any row, then click on “Create user” or press “C” from the keyboard.

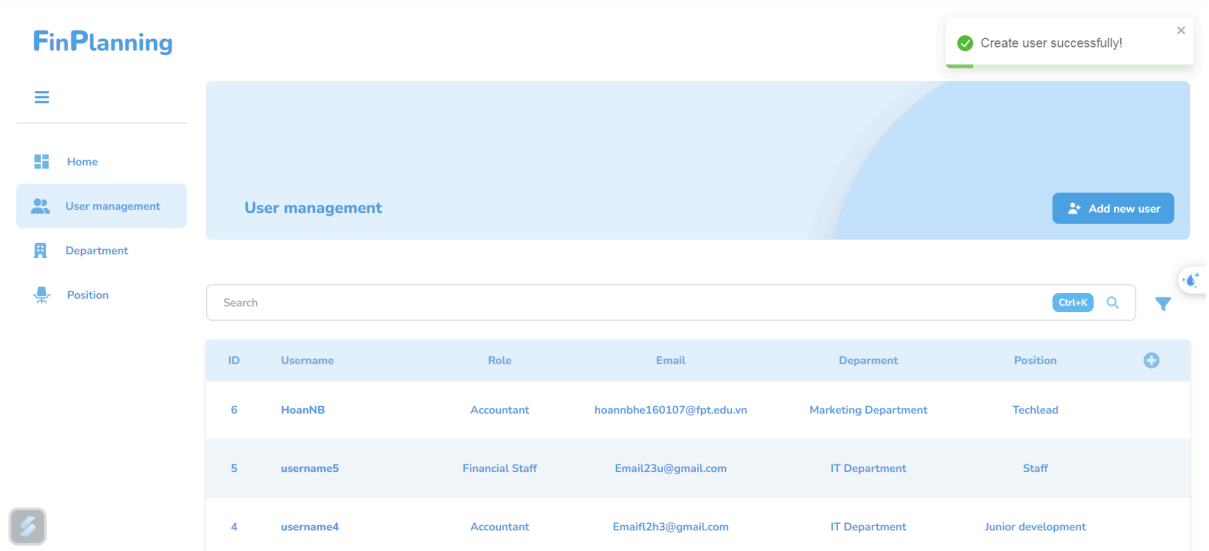
Step 3: New user form will be displayed, fill all required fields and click on “Create User”



***Note:** New user will receive an email for user account information.Sample email below :



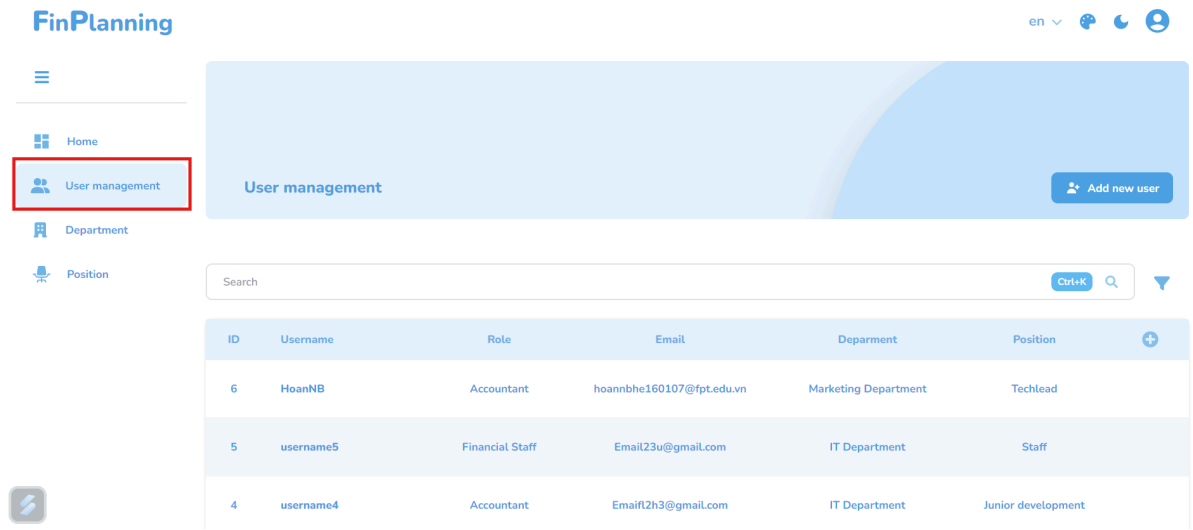
Step 4: Redirect Admin to “User management” page with successful message.



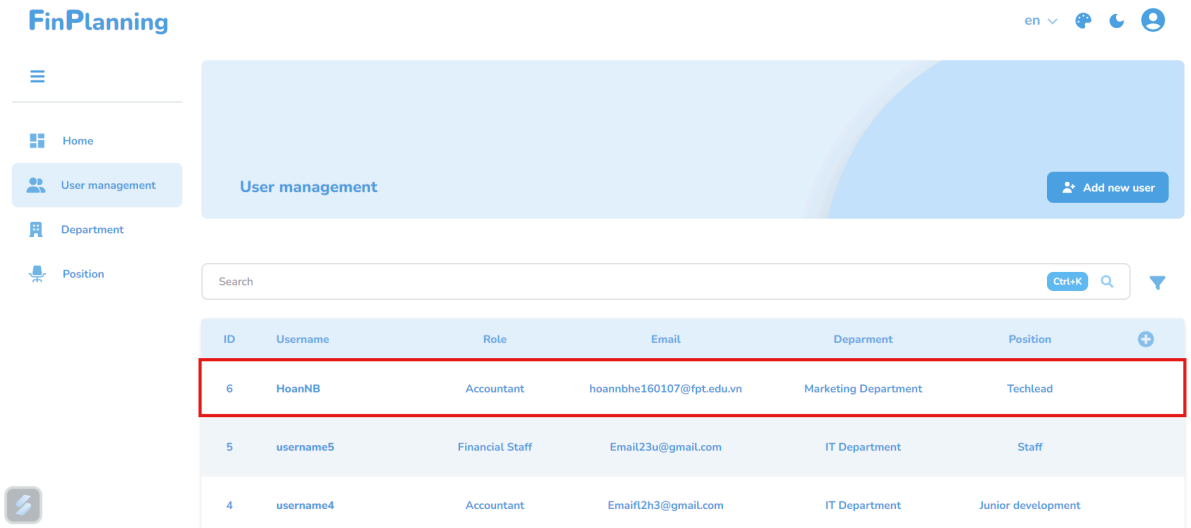
6.3.4.2 Edit user (사용자 편집)

Role: Admin

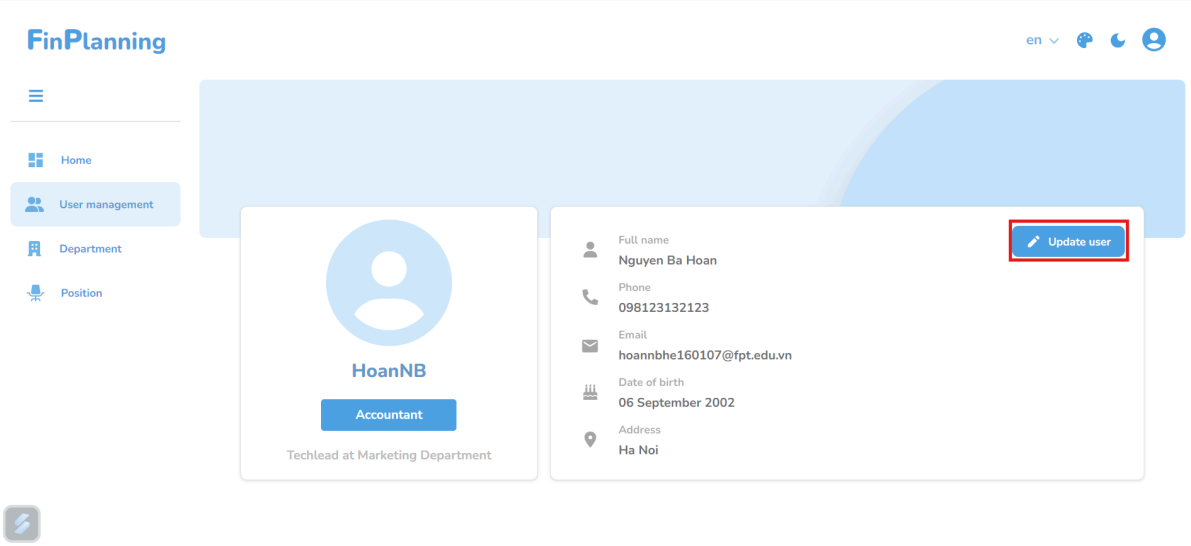
Step 1: User login using Admin account and click on User Management on sidebar after Home screen is displayed



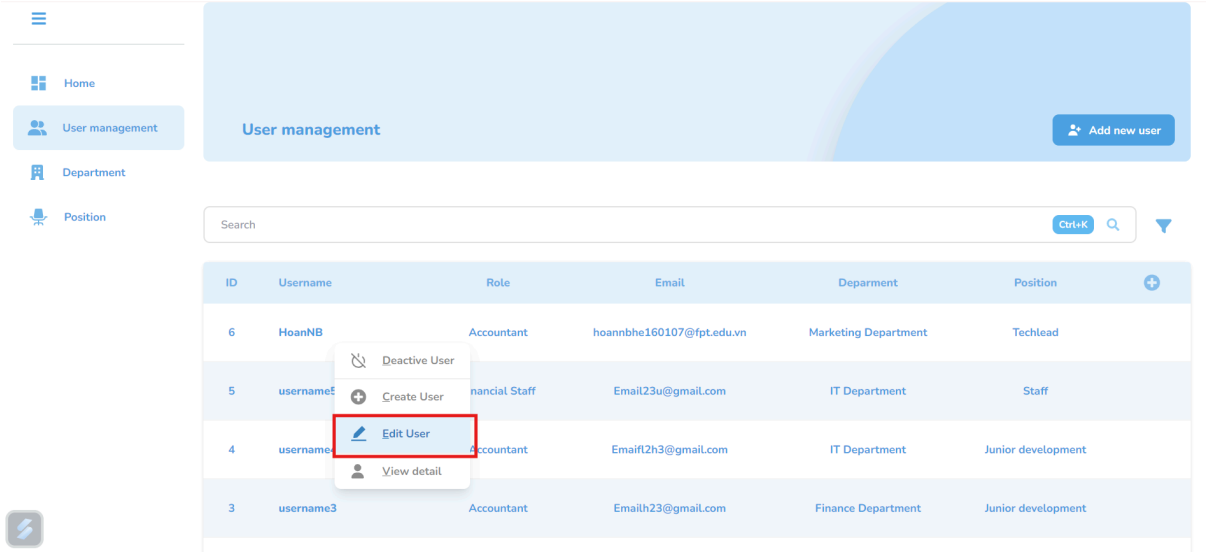
Step 2: Admin selects a row in table to access “User detail” page for that user



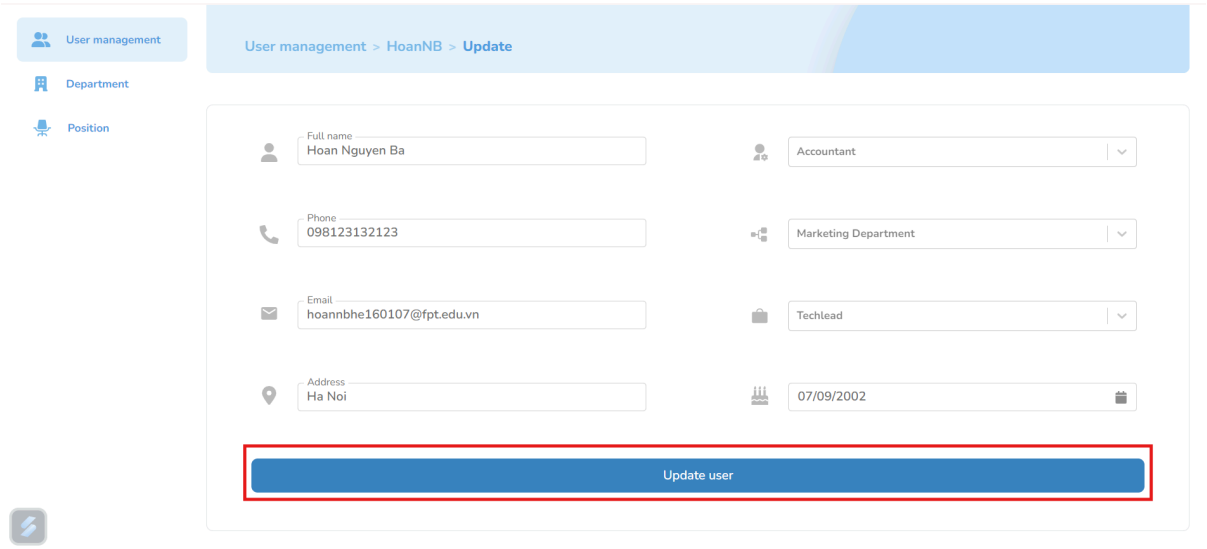
Step 3: Admin click on “Update user” to access the “Update user” page.



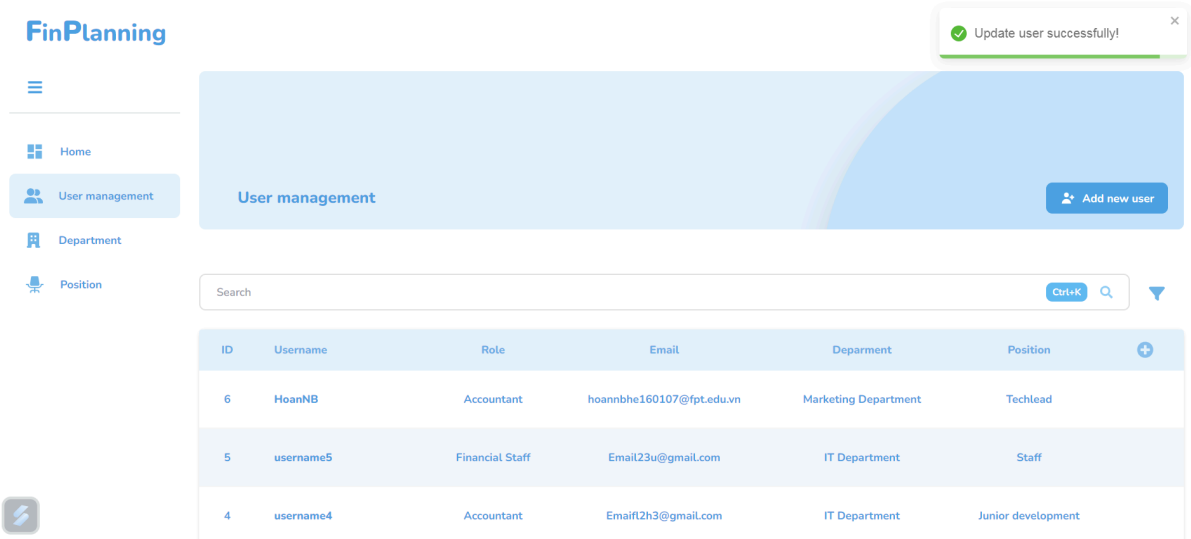
***Note:** From step 2, users can right click on the user row which Admin wants to edit, then click on “Edit user” or press “E” from the keyboard.



Step 4: Edit user form will be displayed, after fill all required fields and click on “Update User”



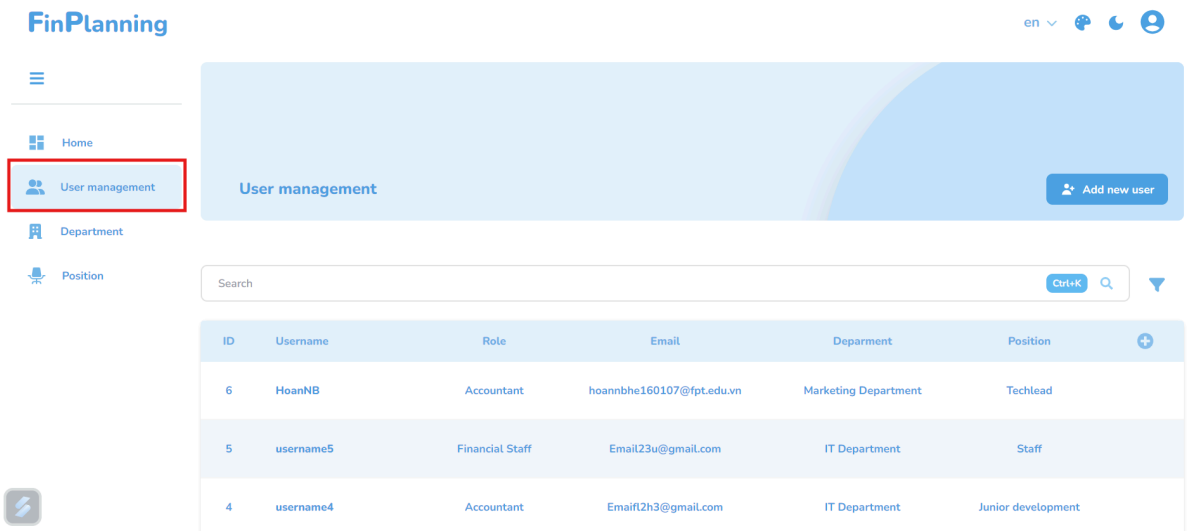
Step 5: Redirect Admin to “User management” page with successful message.



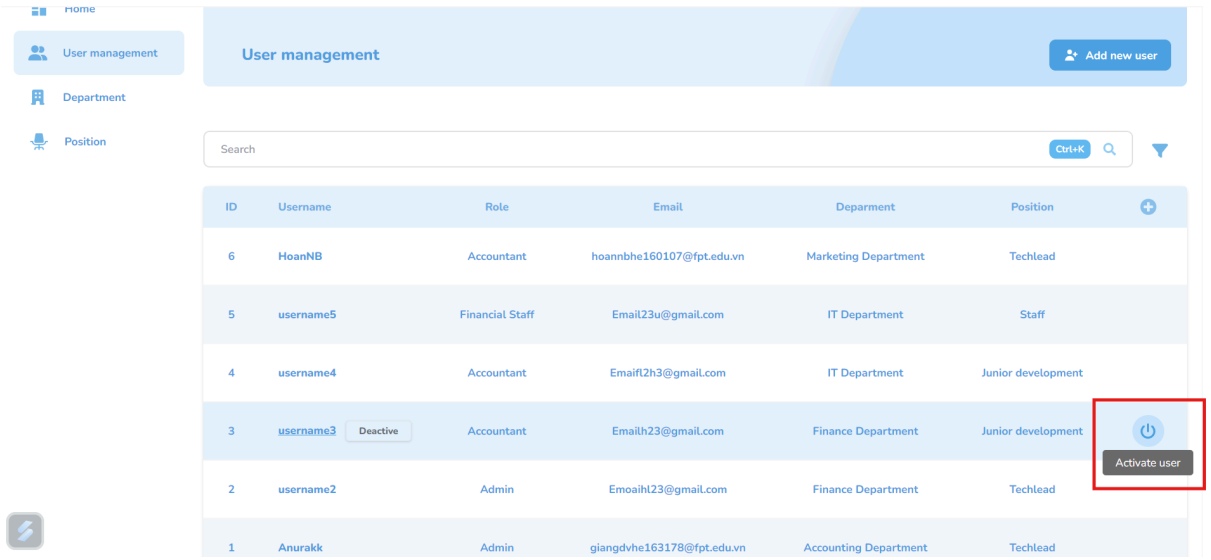
6.3.4.3 Activate user (사용자 활성화)

Role: Admin

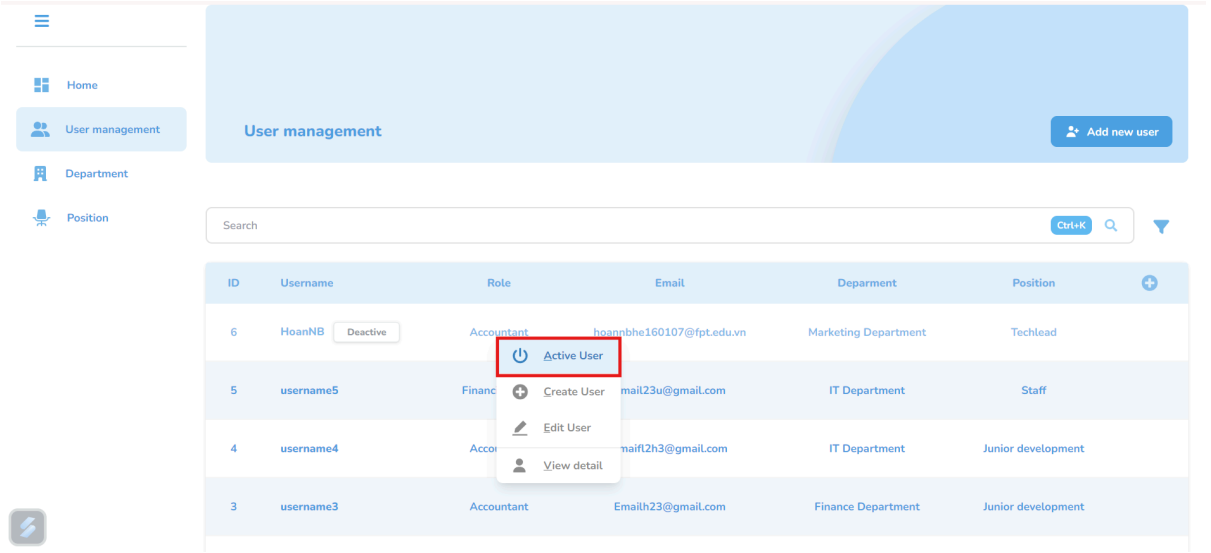
Step 1: User login using Admin account and click on User Management on sidebar after Home screen is displayed



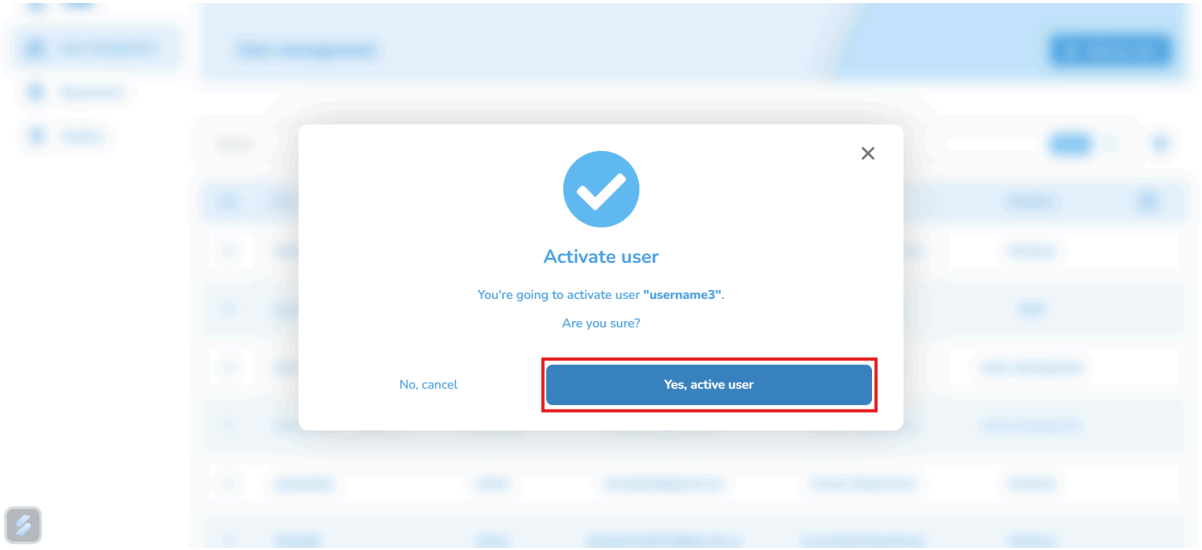
Step 2: User hover over the user whose status is deactivate, then click on “Activate” icon



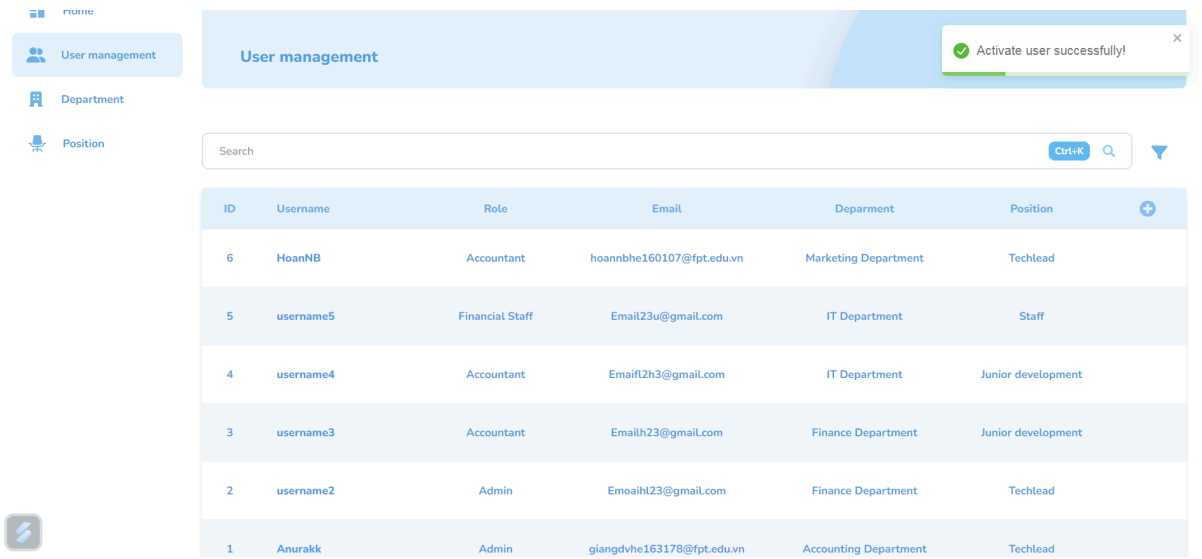
***Note:** Users can right click on the user row which Admin wants to activate, then click on "Active User" or press "A" from the keyboard.



Step 3: After a pop-up activate screen is displayed, click on "Yes, active user"



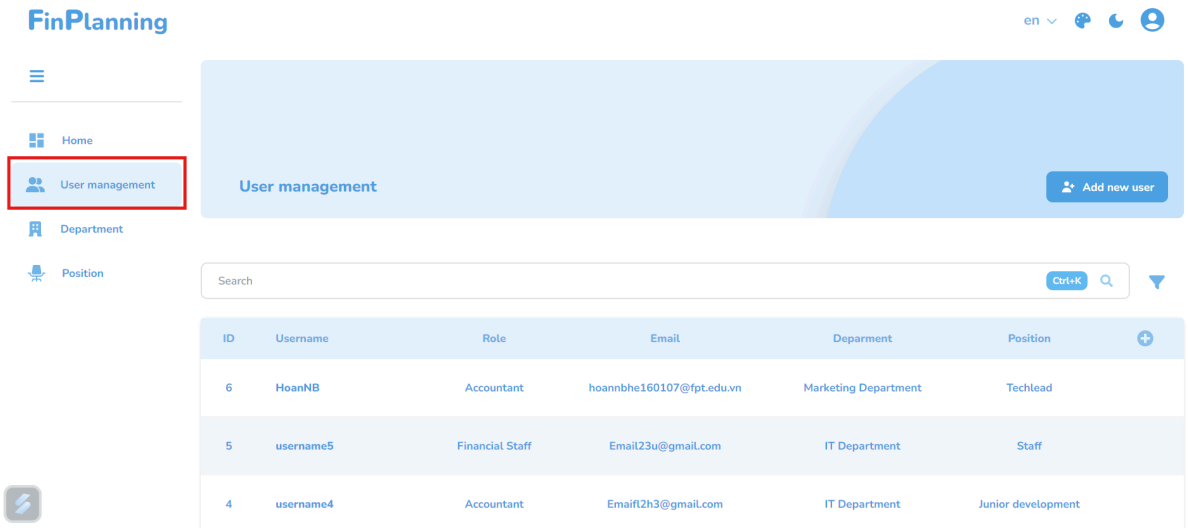
Step 4: Activated successfully message will be displayed and user status will change correctly.



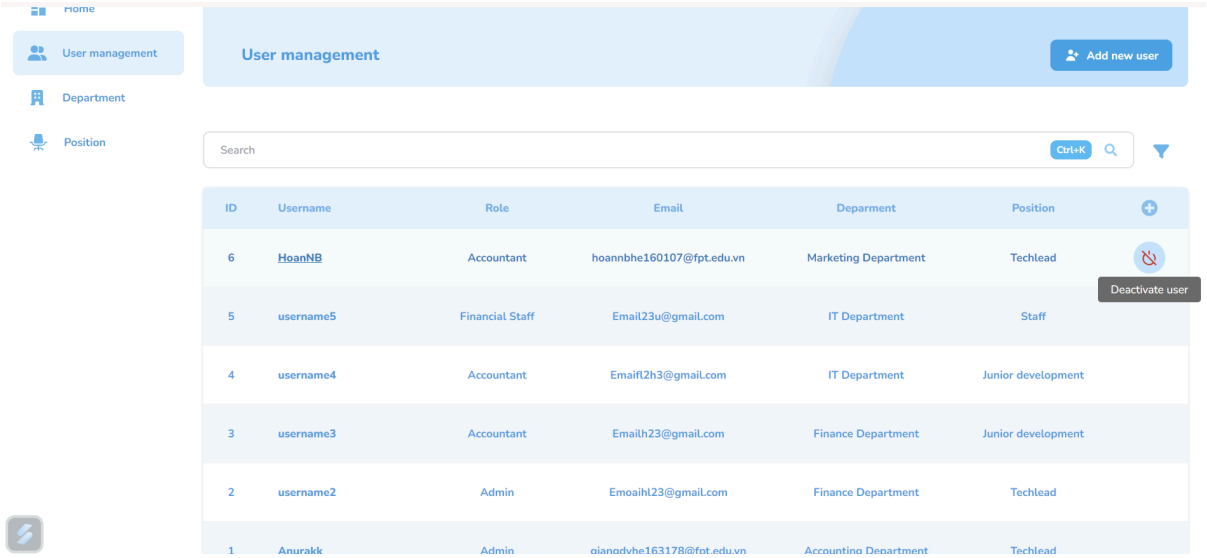
6.3.4.4 Deactivate user (사용자 비활성화)

Role: Admin

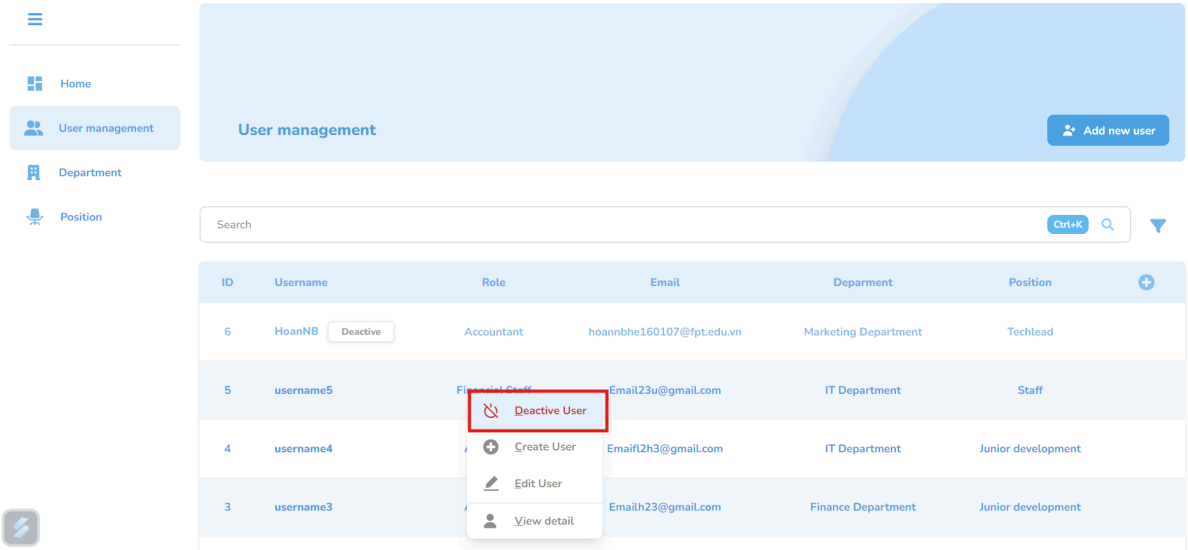
Step 1: User login using Admin account and click on User Management on sidebar after Home screen is displayed



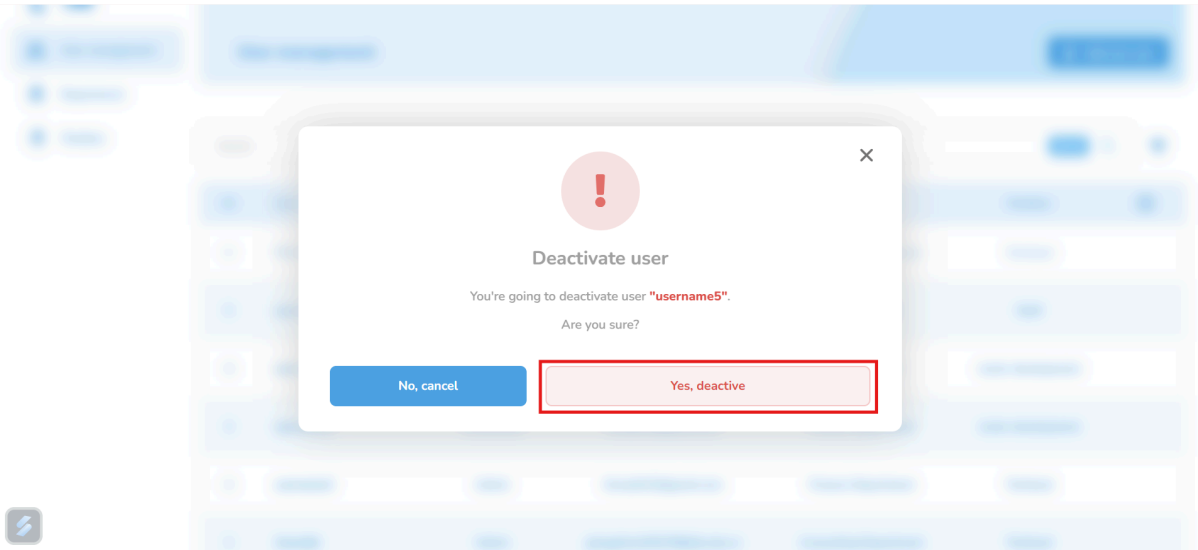
Step 2: User hover over the user whose status is activate, then click on “Deactivate” icon



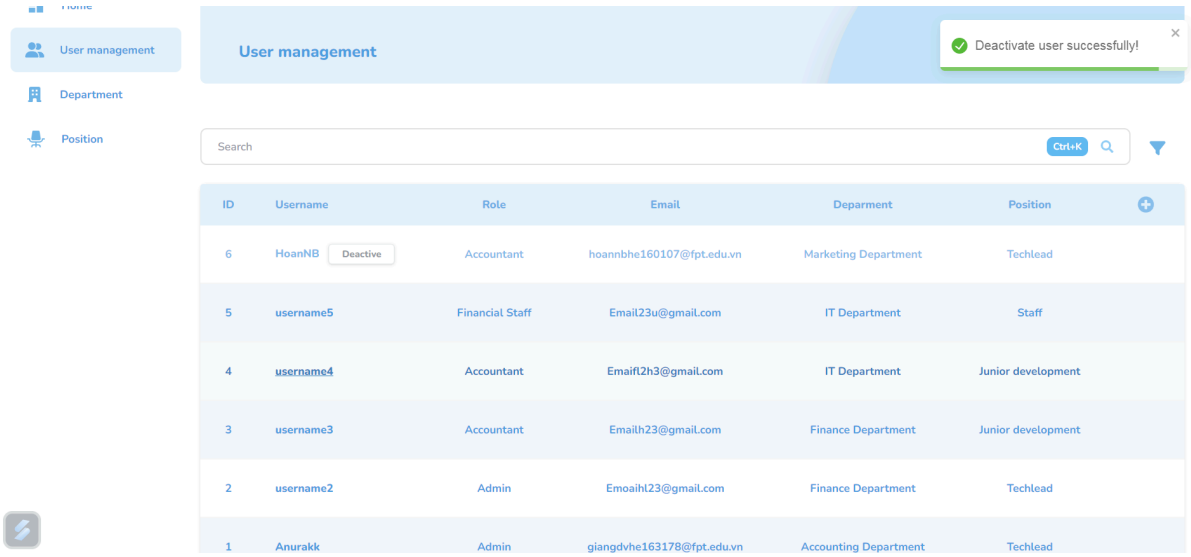
***Note:** Users can right click on the user row which Admin wants to deactive, then click on “Deactive User” or press “D” from the keyboard.



Step 3: After a pop-up activate screen is displayed, click on “Yes, deactive”



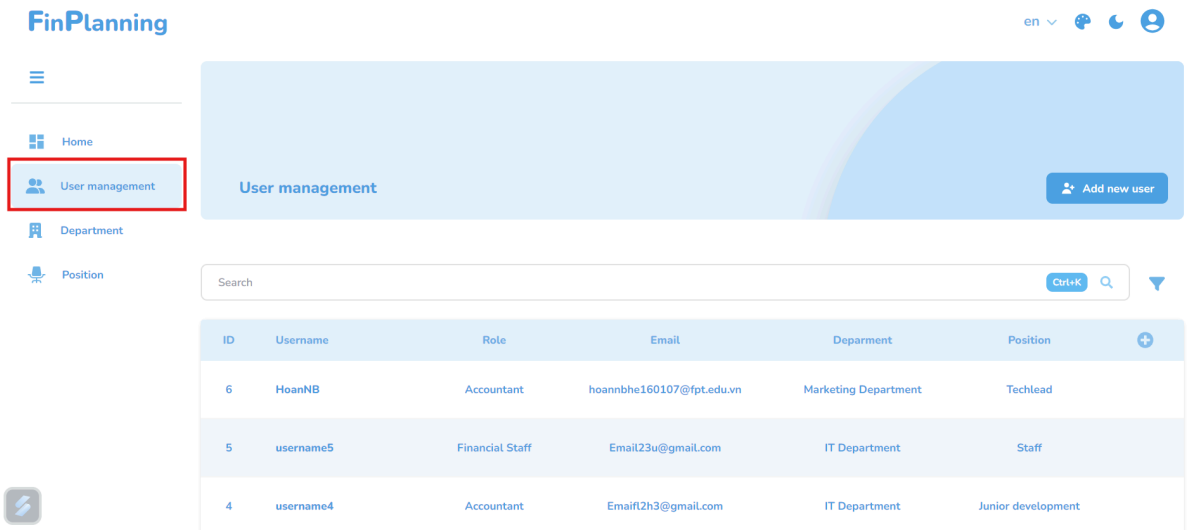
Step 4: Deactivated successfully message will be displayed and user status will change correctly.



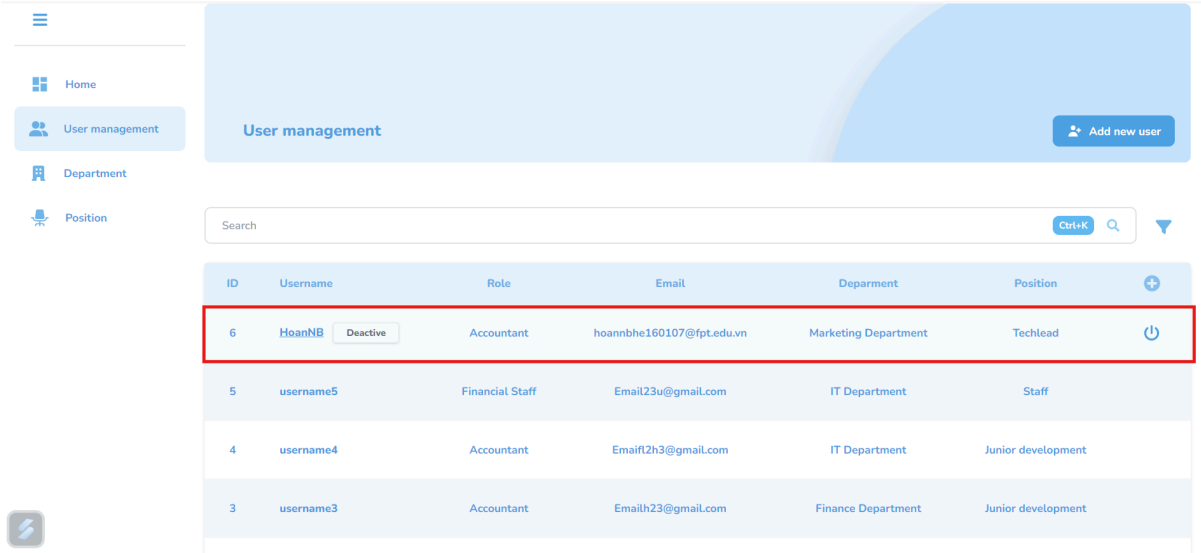
6.3.4.5 View user details (사용자 세부 정보 보기)

Role: Admin

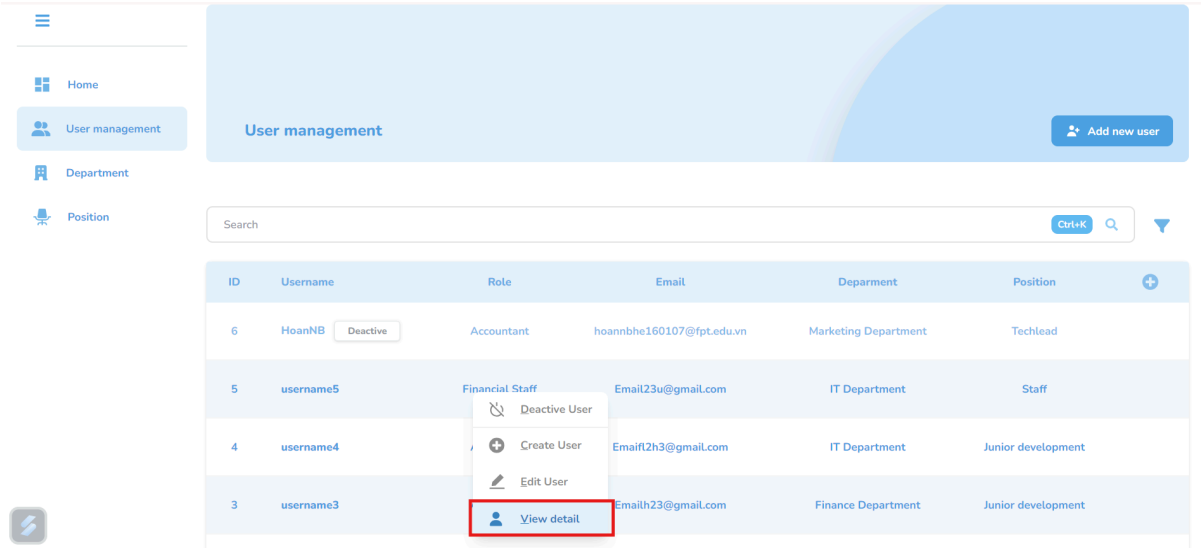
Step 1: User login using Admin account and click on User Management on sidebar after Home screen is displayed



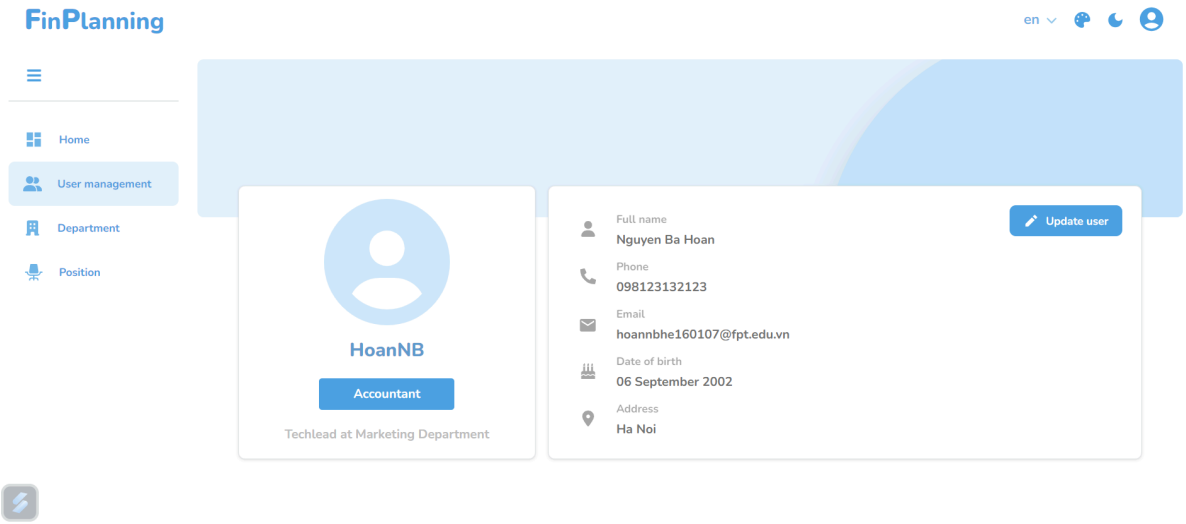
Step 2: Admin selects a row in table to access “User detail” page for that user



***Note:** Users can right click on the user row, then click on “View detail” or press “V” from the keyboard.



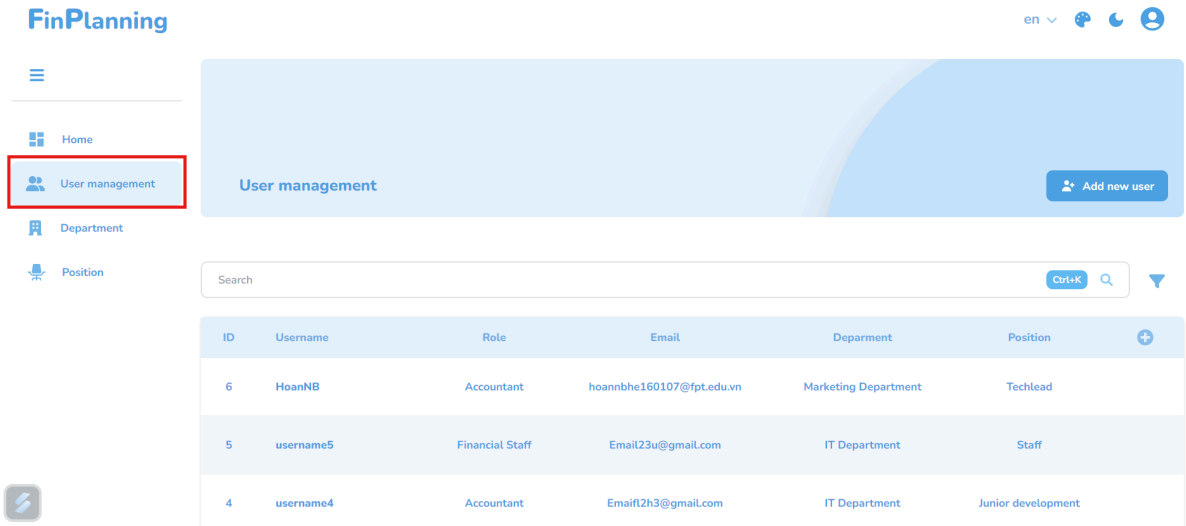
Step 3: Admin is redirected to "User detail" page



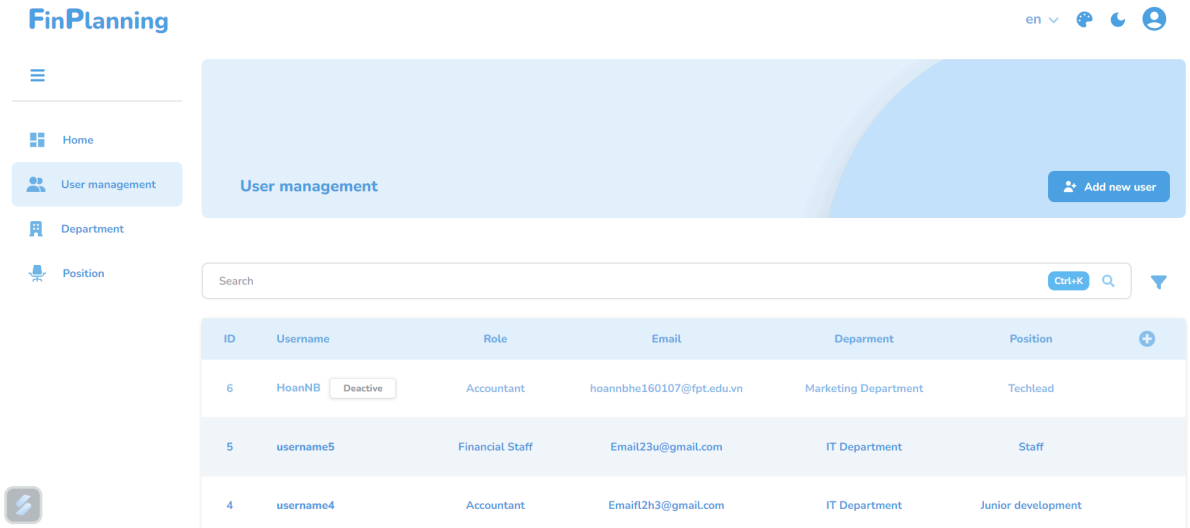
6.3.4.6 View user list (사용자 목록 보기)

Role: Admin

Step 1: User login using Admin account and click on User Management on sidebar after Home screen is displayed



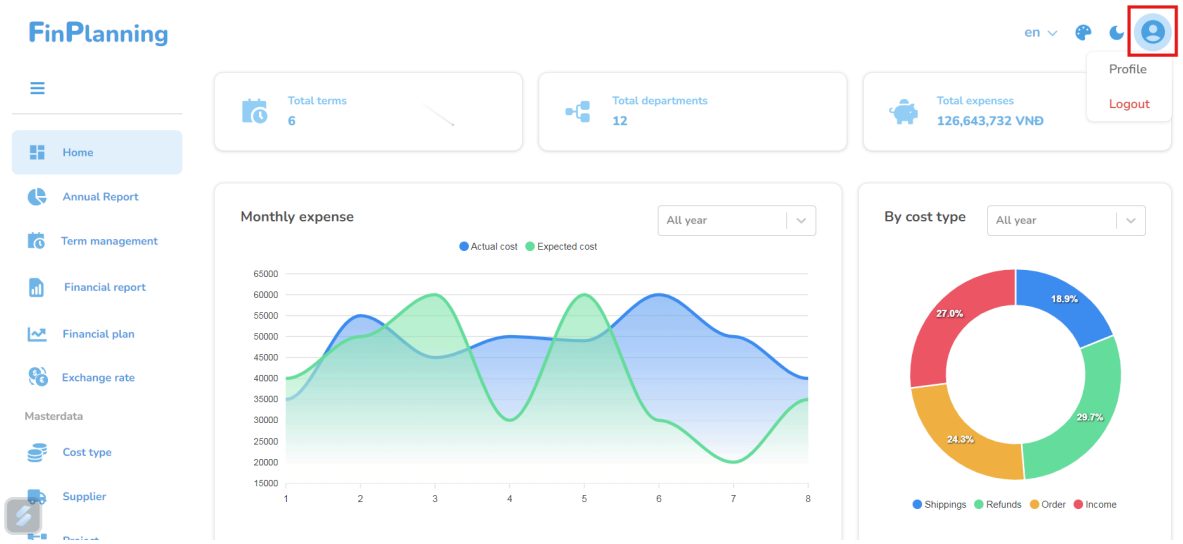
Step 2: User list is displayed



6.3.4.7 Profile (프로필)

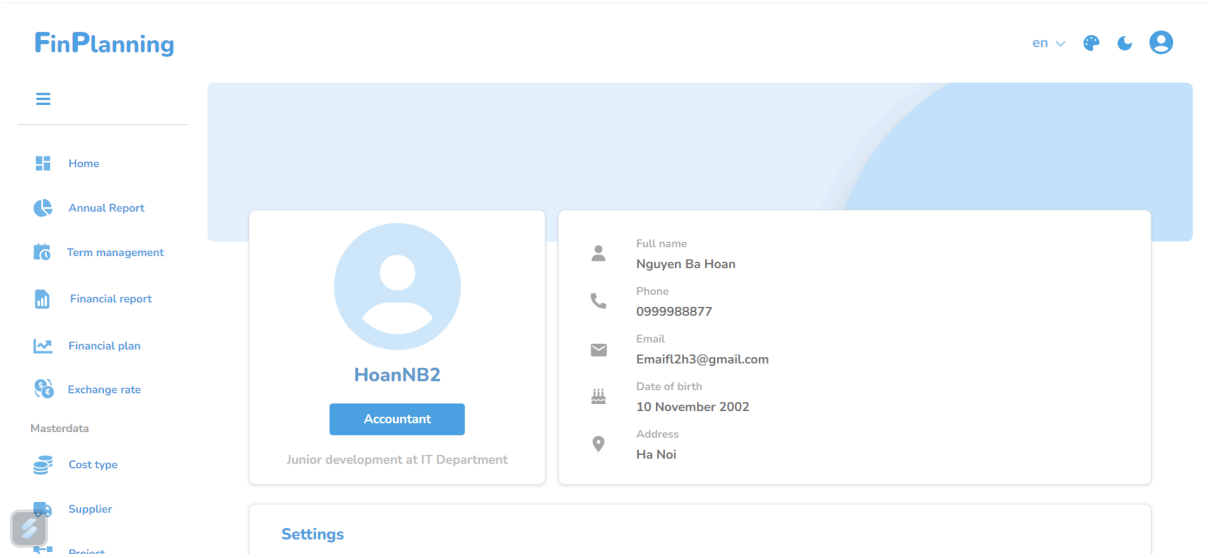
Role: Admin / Accountant / Financial Staff

Step 1: Login to system with any role, then click on “User” icon



Step 2: Click on Profile on dropdown menu

Step 3: “Profile” page is displayed

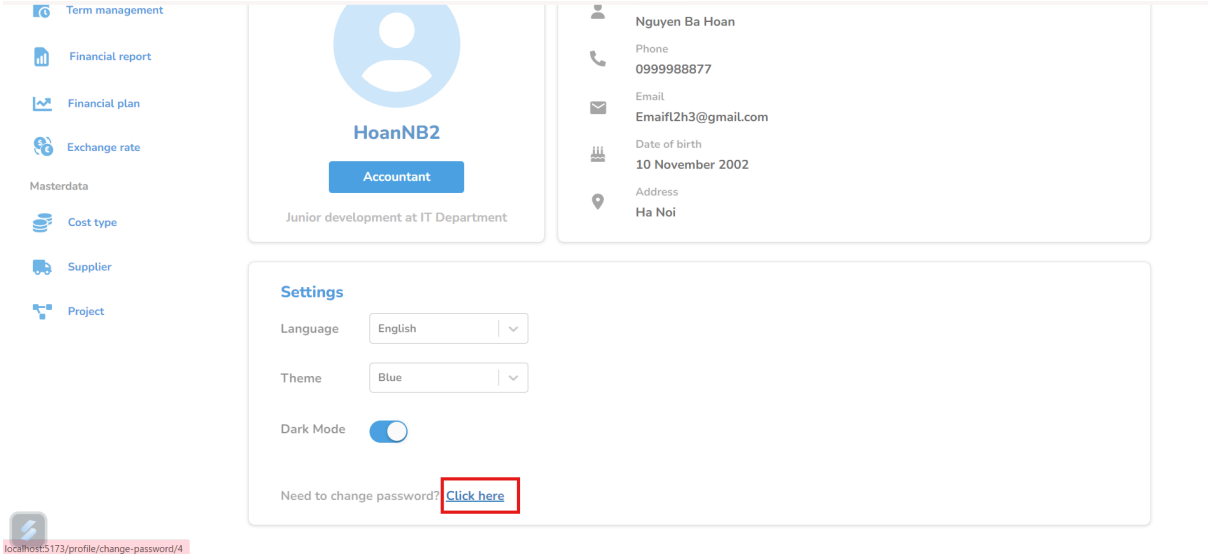


6.3.4.8 Change Password (비밀번호 변경)

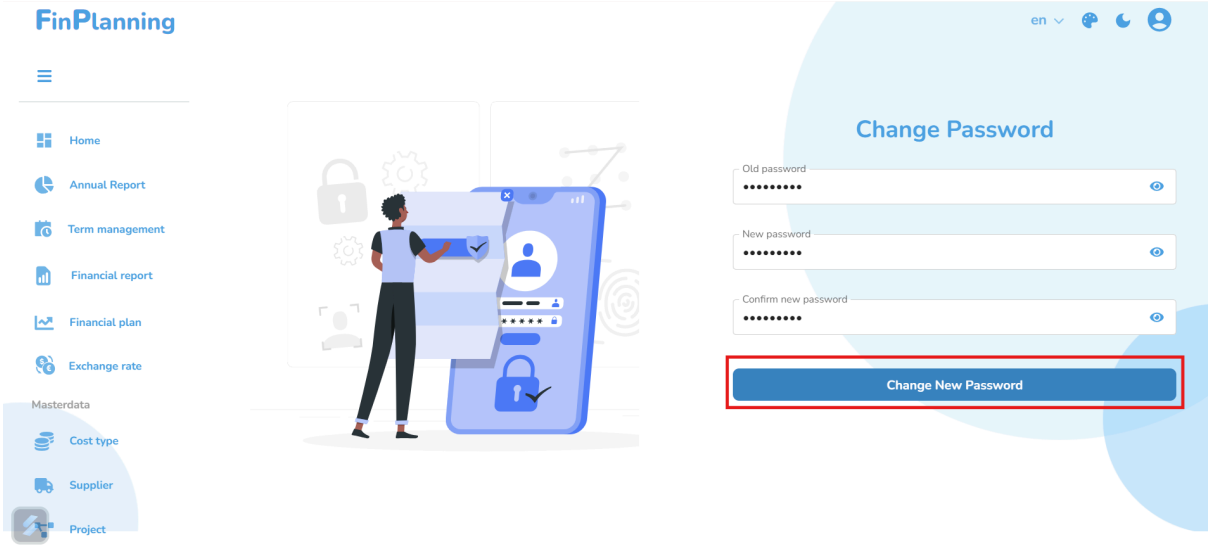
Role: Admin / Accountant / Financial Staff

Step 1: Access “Profile” page (step to access profile page: refer to 6.3.4.7)

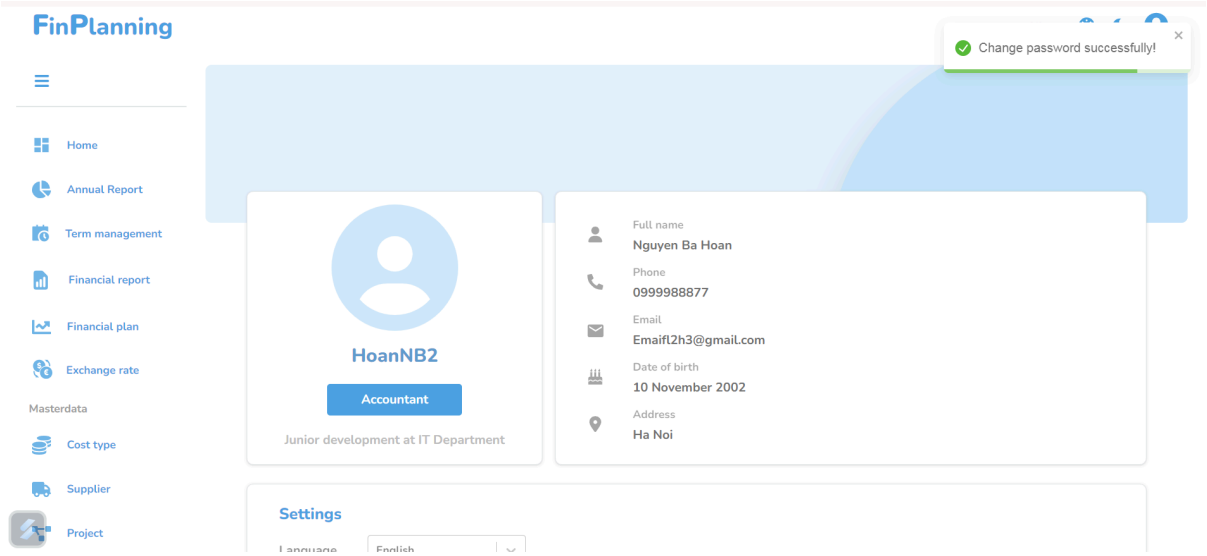
Step 2: Click on “Click here” link to access “Change password” page



Step 3: Fill all valid fields, then click on “Change New Password” button



Step 4: Redirect to “Profile” page with successful message

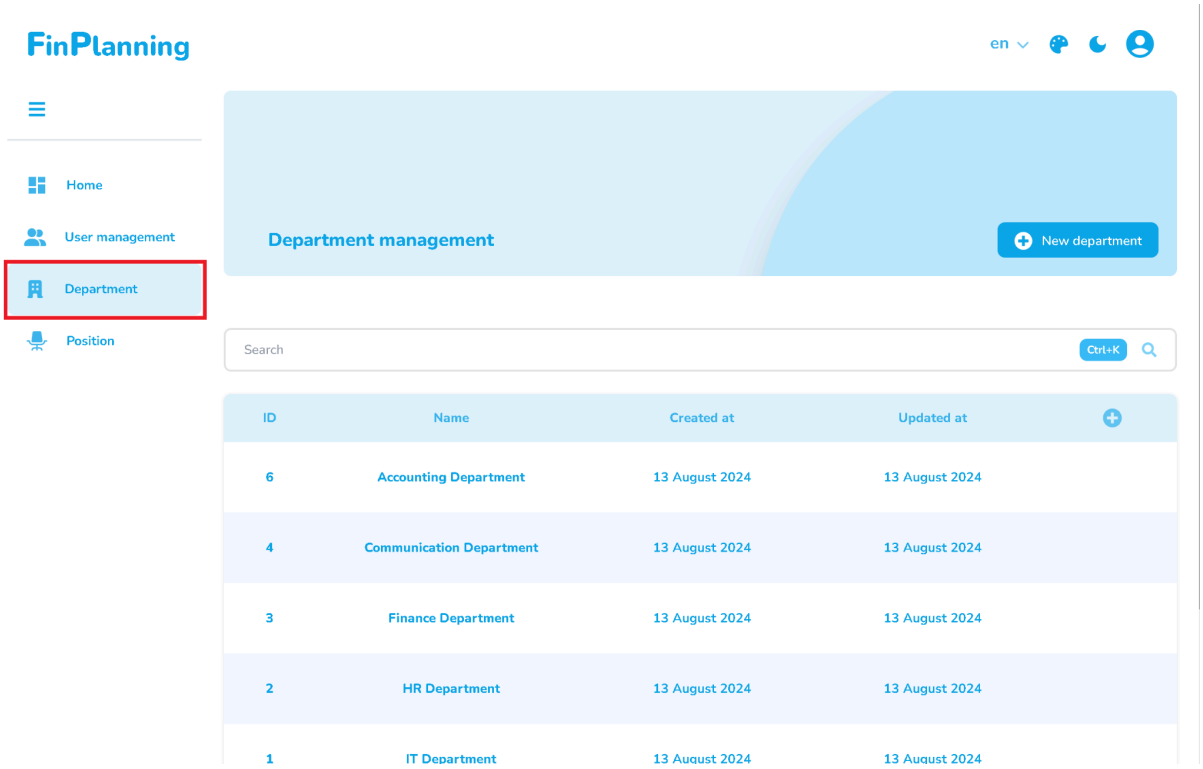


6.3.5 Workflow Master Data (Admin) (마스터 데이터 워크플로우 - 관리자)

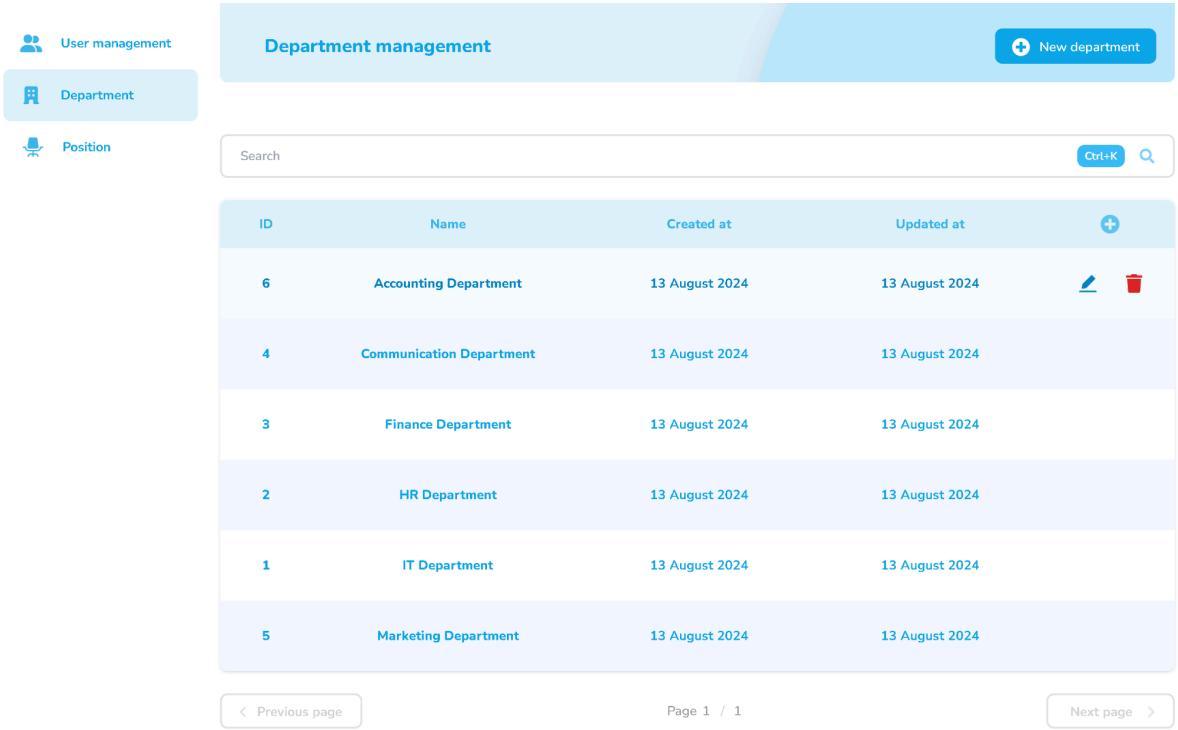
6.3.5.1 View department list (부서 목록 보기)

Role: Admin

Step 1: Login using Admin account, after Home screen is displayed, click on “Department” on sidebar



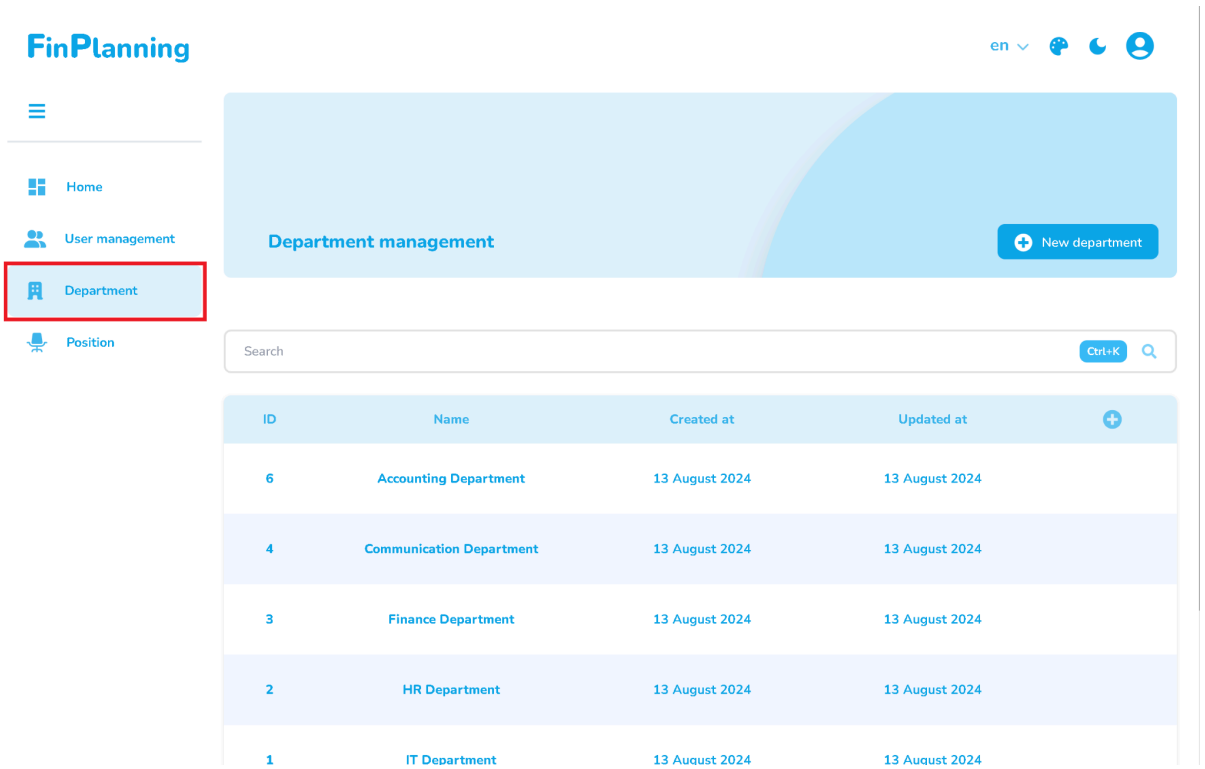
Step 2: Department list will be displayed



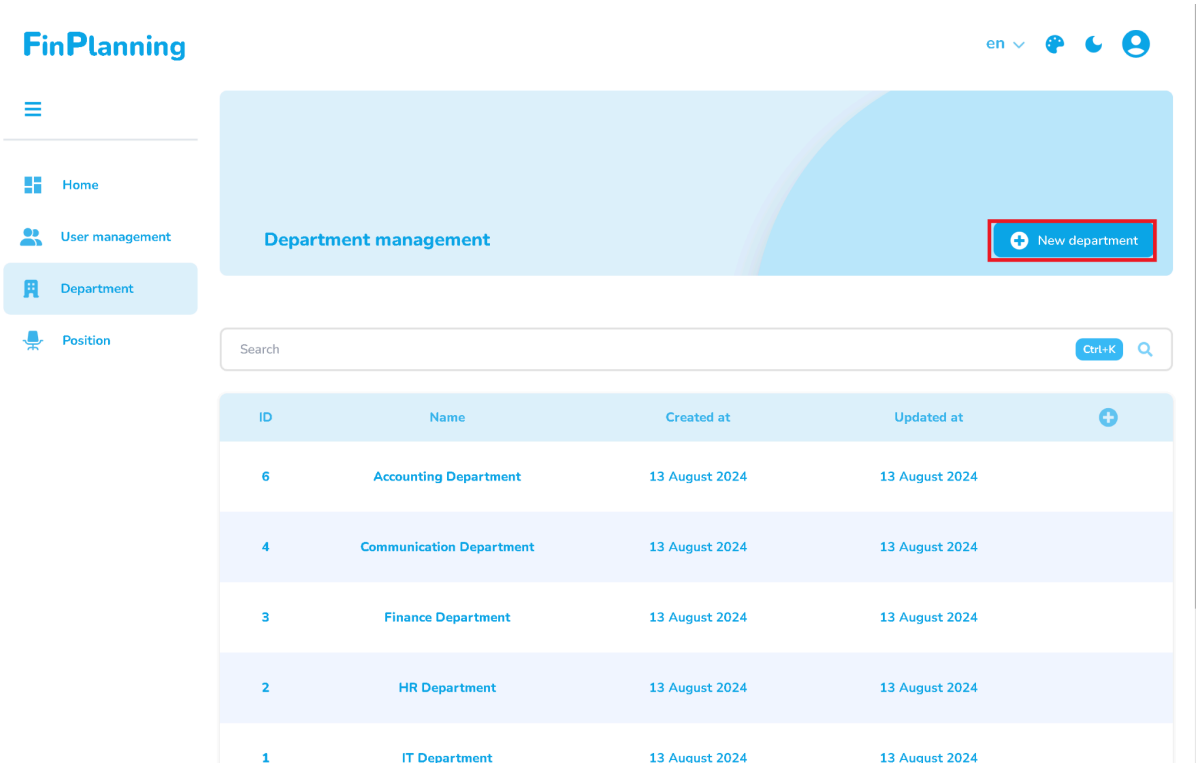
6.3.5.2 Create department (부서 생성)

Role: Admin

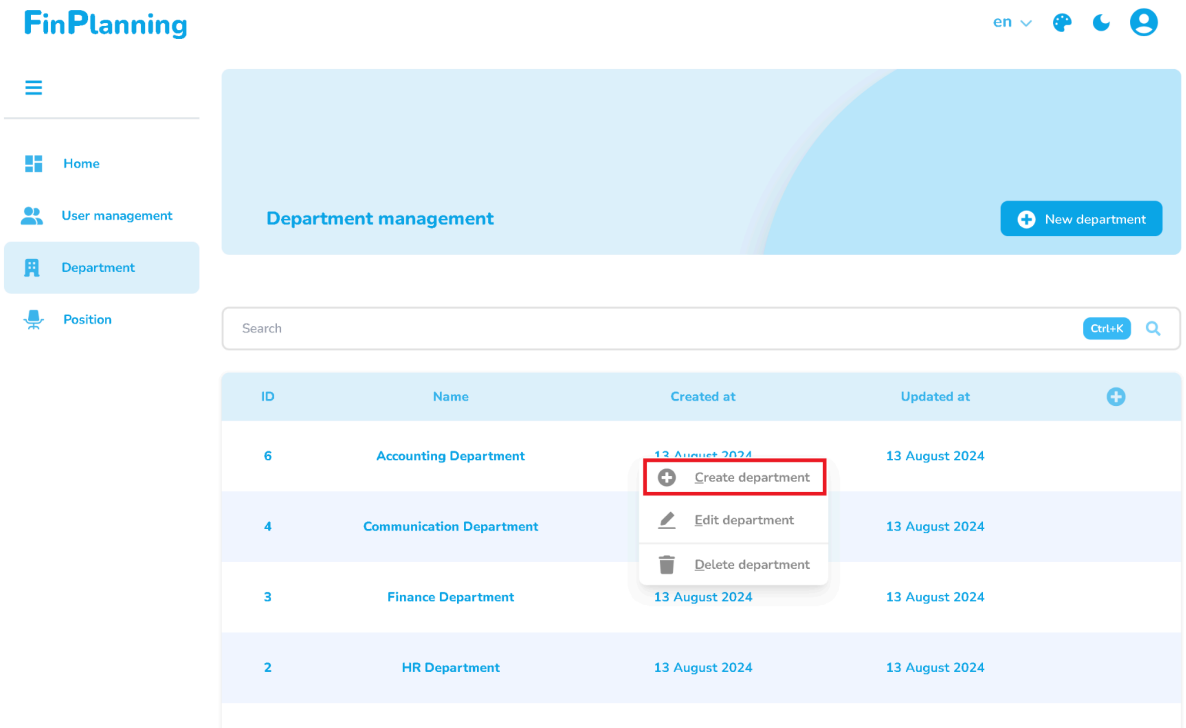
Step 1: Login using Admin account, after Home screen is displayed, click on “Department” on sidebar



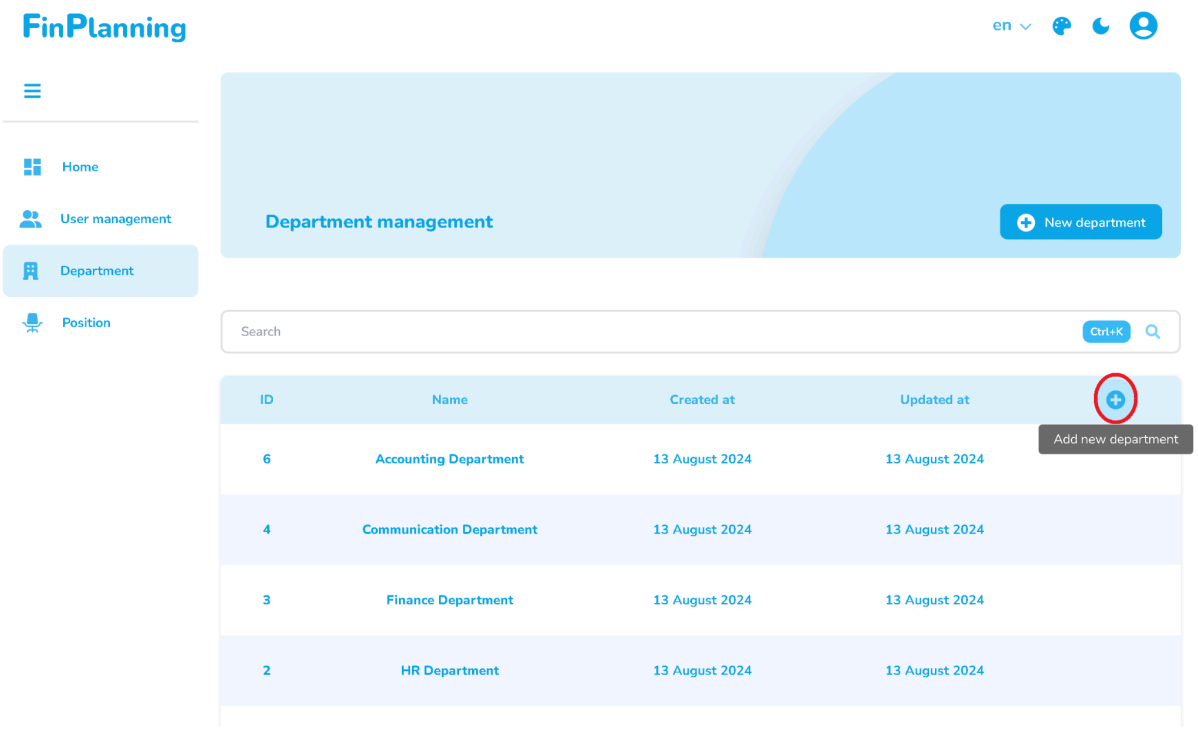
Step 2: Click on “New department”



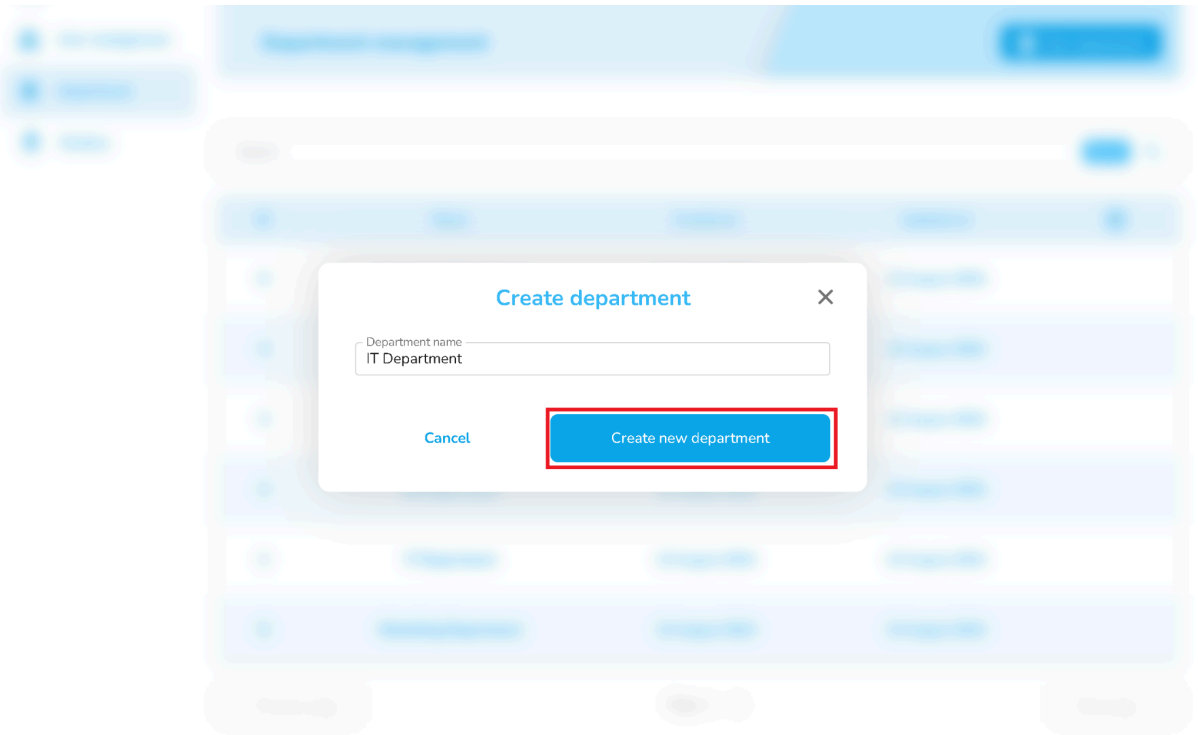
***Note:** Users can right click on the department list and click on “Create department” or Press “C” button from the keyboard.



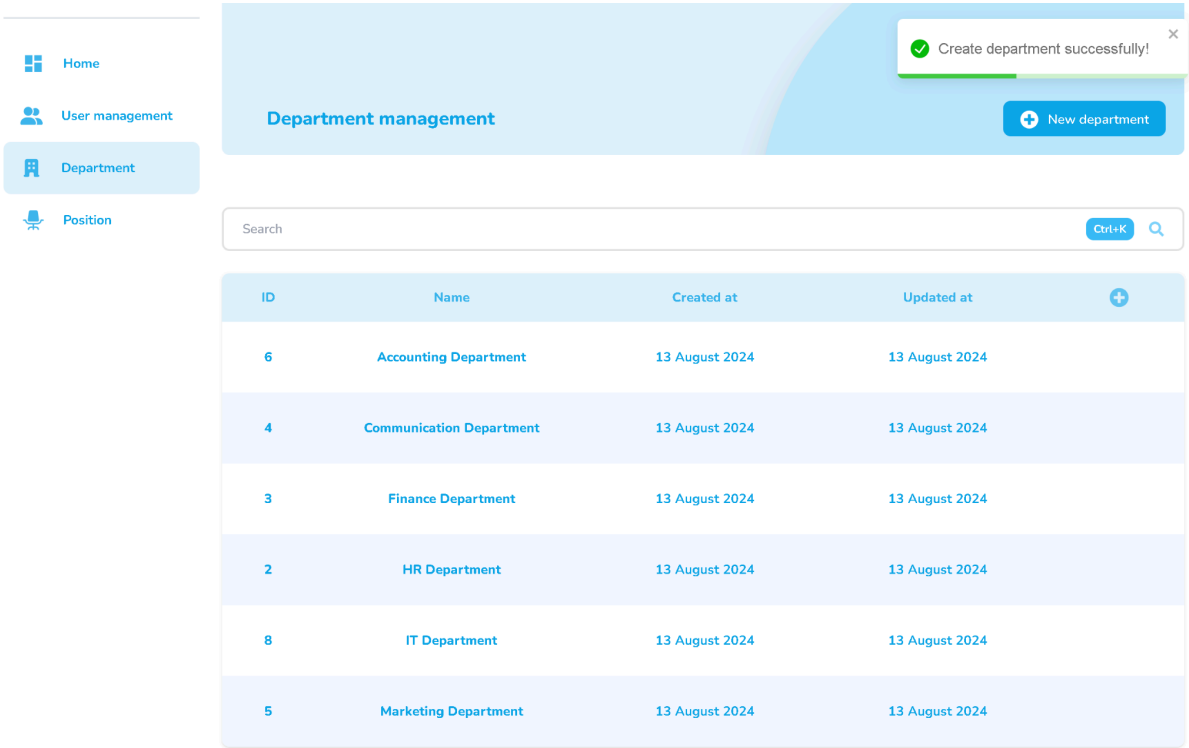
***Note:** User can click on “+” button



Step 3: After a pop-up screen is displayed, fill the required field and click on “Create new department”



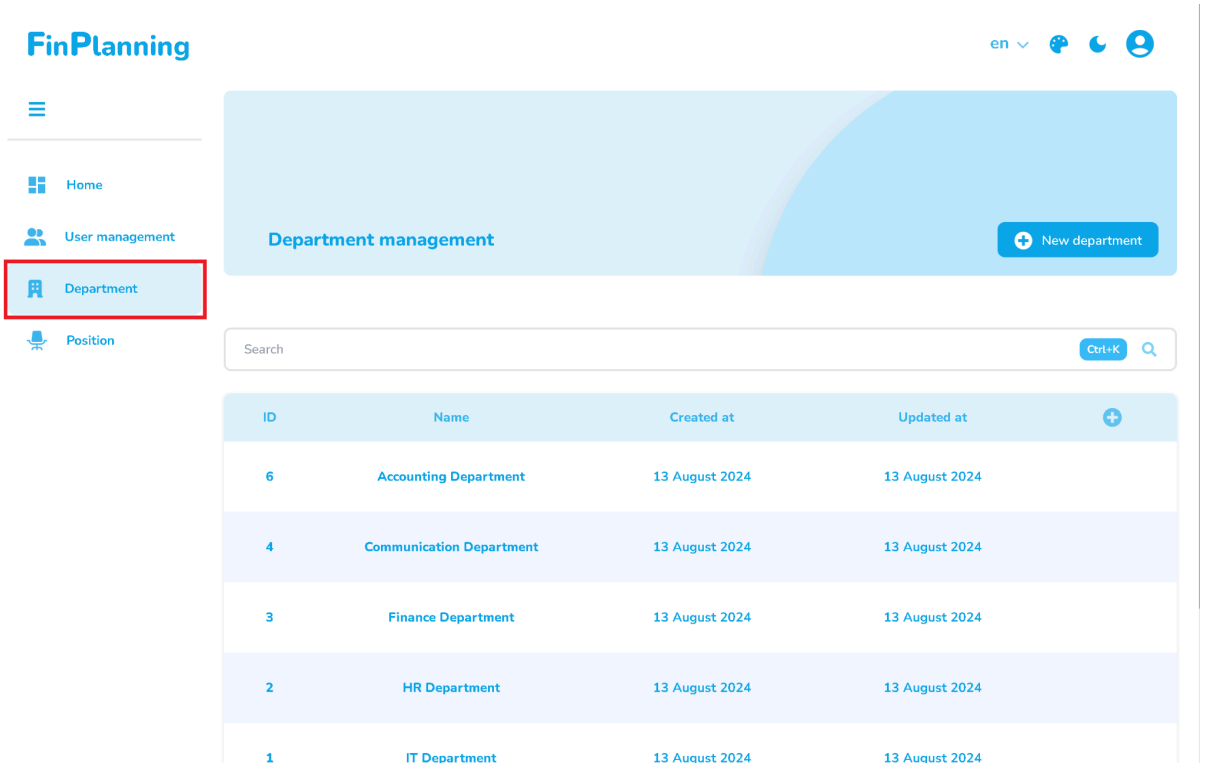
Step 4: Success message will be displayed and new department will be appeared on department list



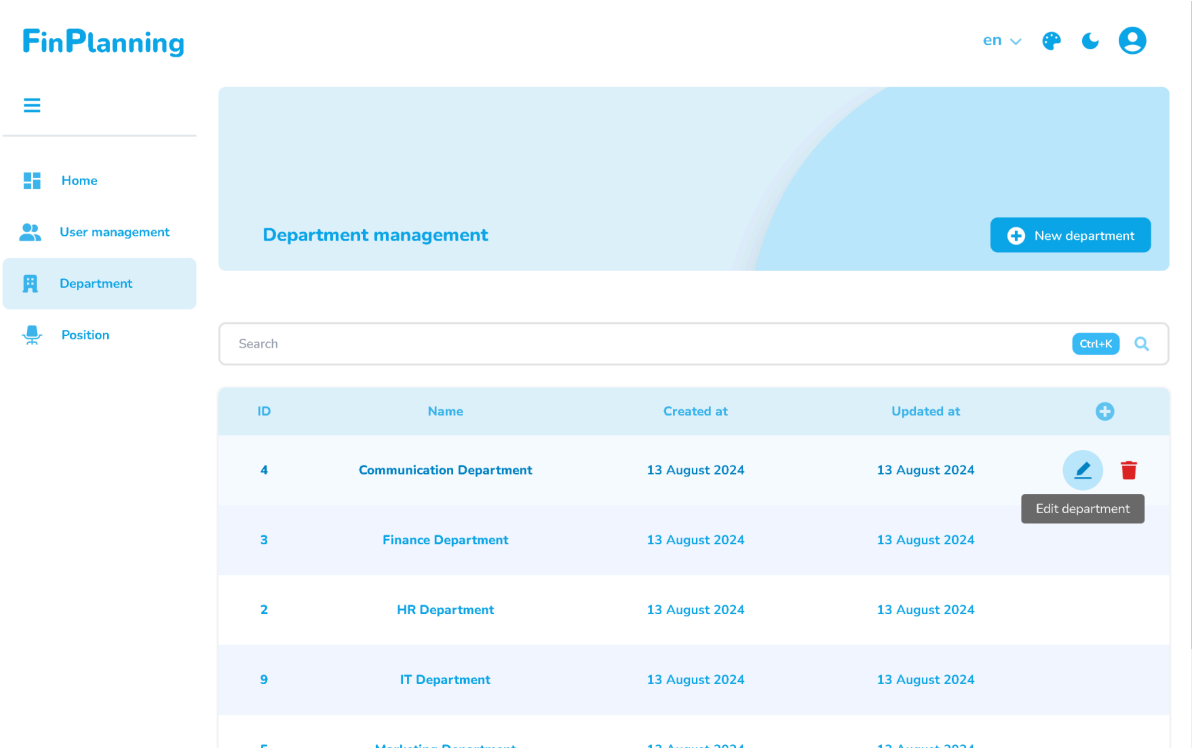
6.3.5.3 Edit department (부서 편집)

Role: Admin

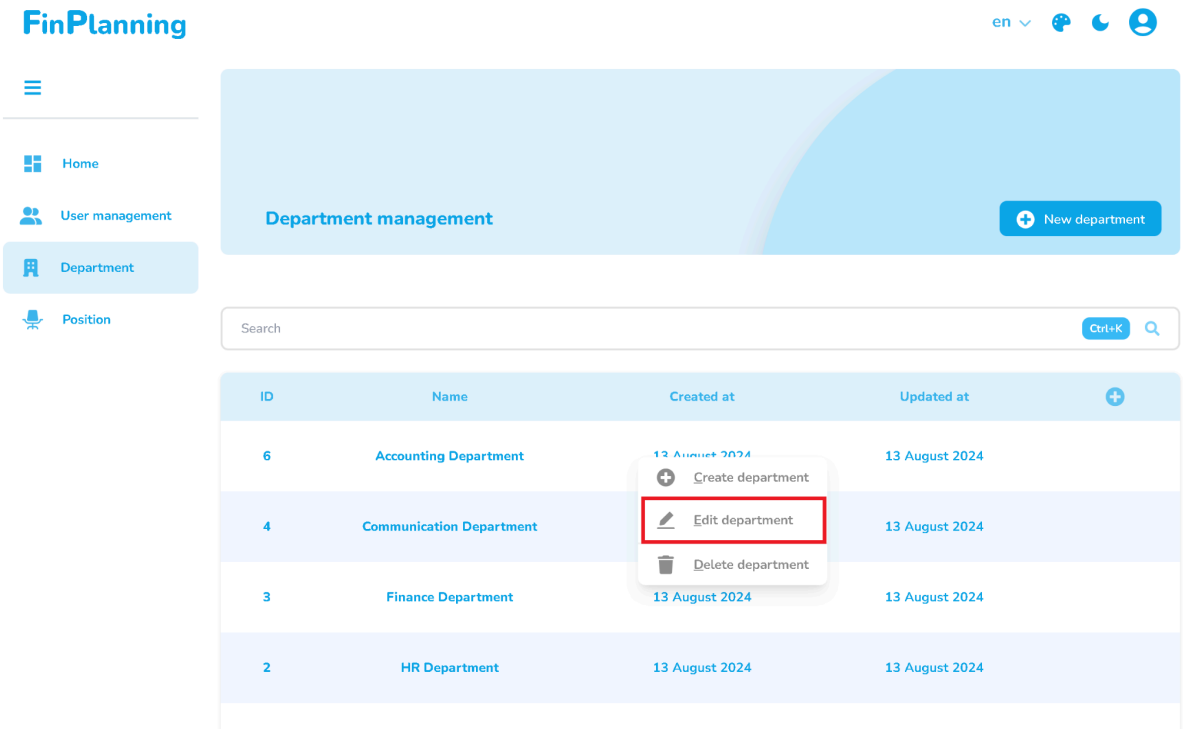
Step 1: Login using Admin account, after Home screen is displayed, click on “Department” on sidebar



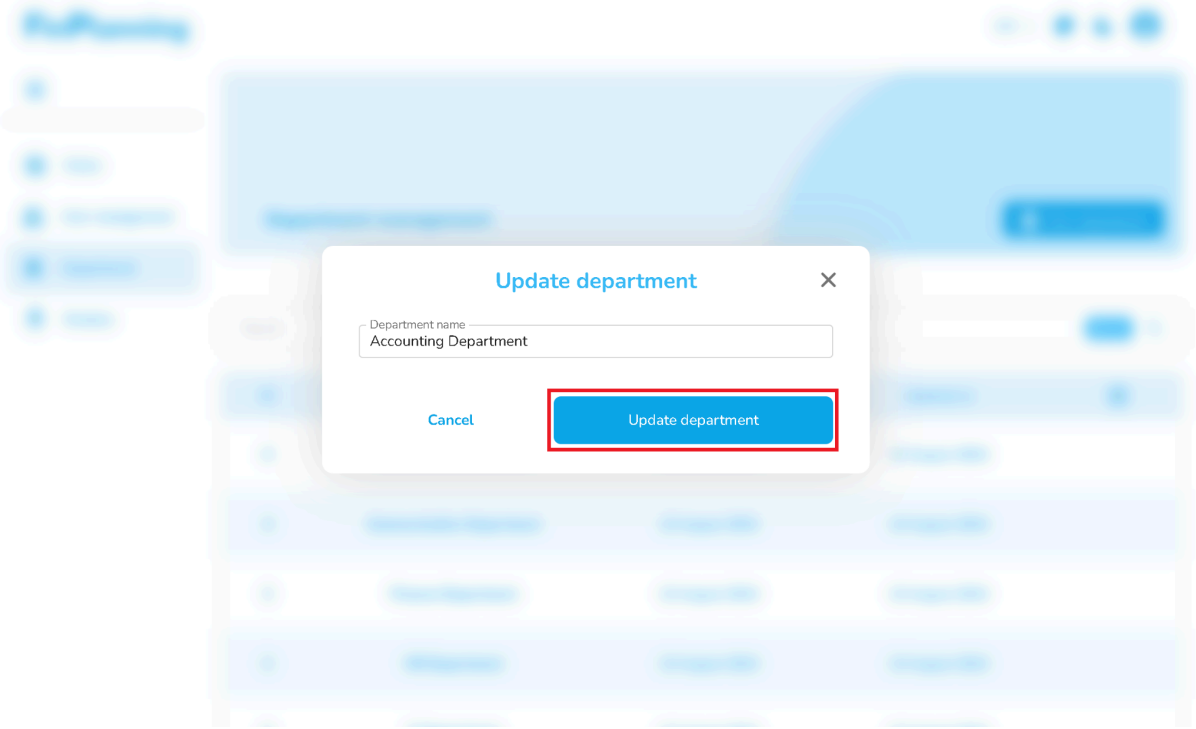
Step 2: Hover over department row which user want to edit, click on “Edit” icon



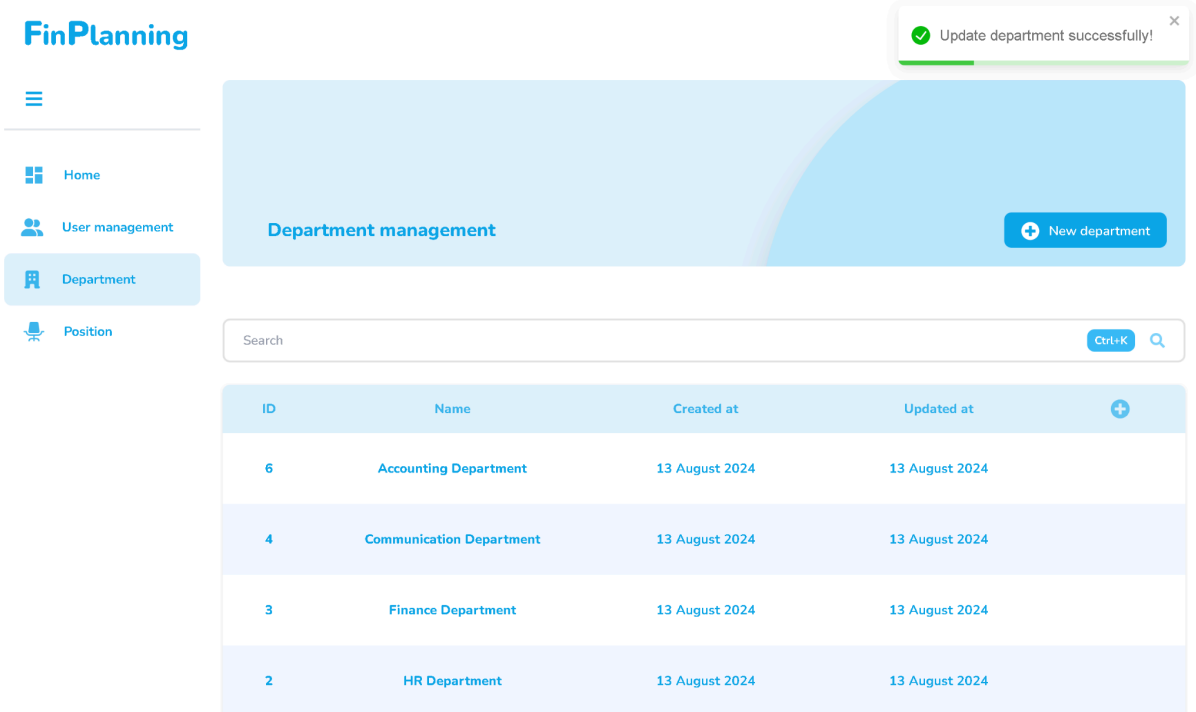
***Note:** User can right click on the row and click on “Edit department”



Step 3: A pop-up screen will be displayed, fill required field and click on “Update department”



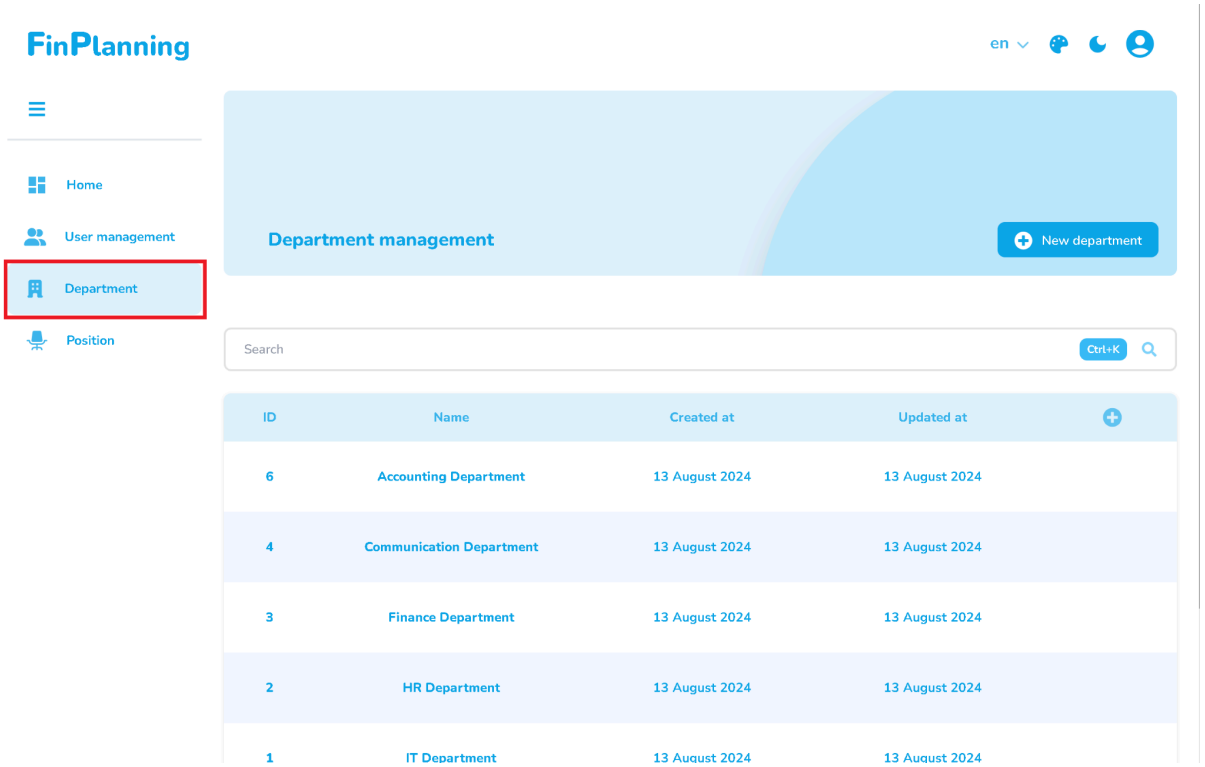
Step 4: Success message will be displayed and user can view department list with updated data



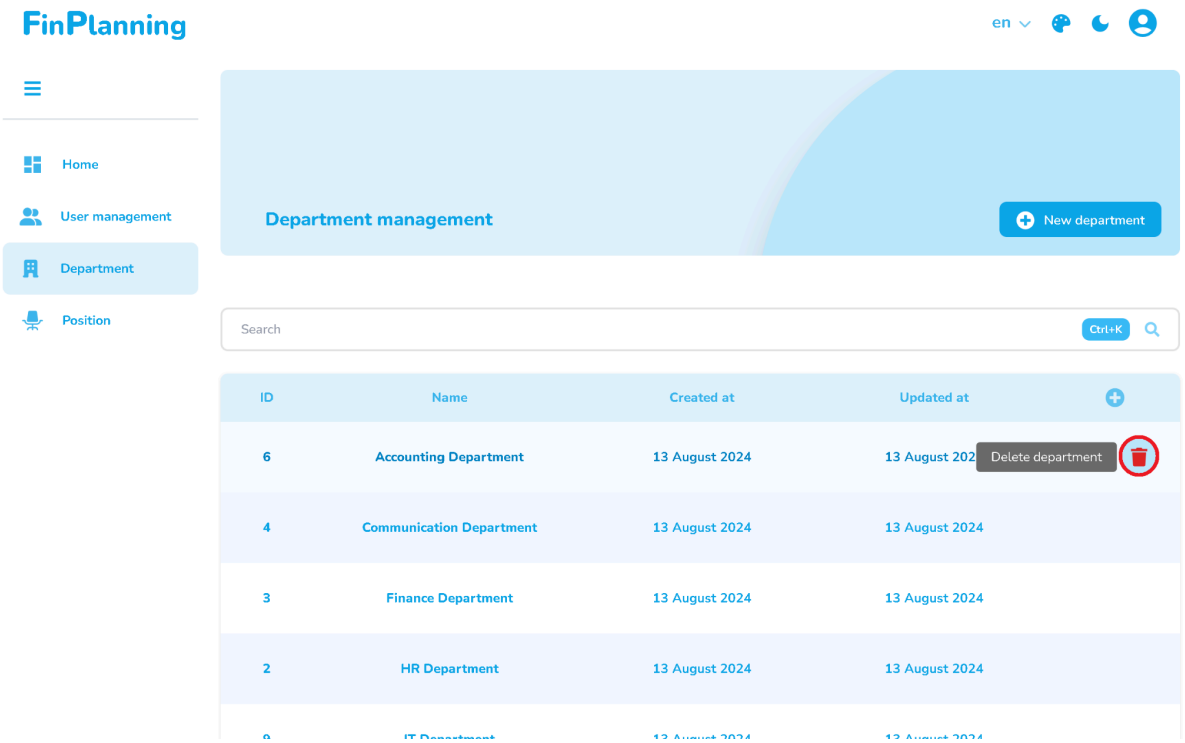
6.3.5.4 Delete department (부서 삭제)

Role: Admin

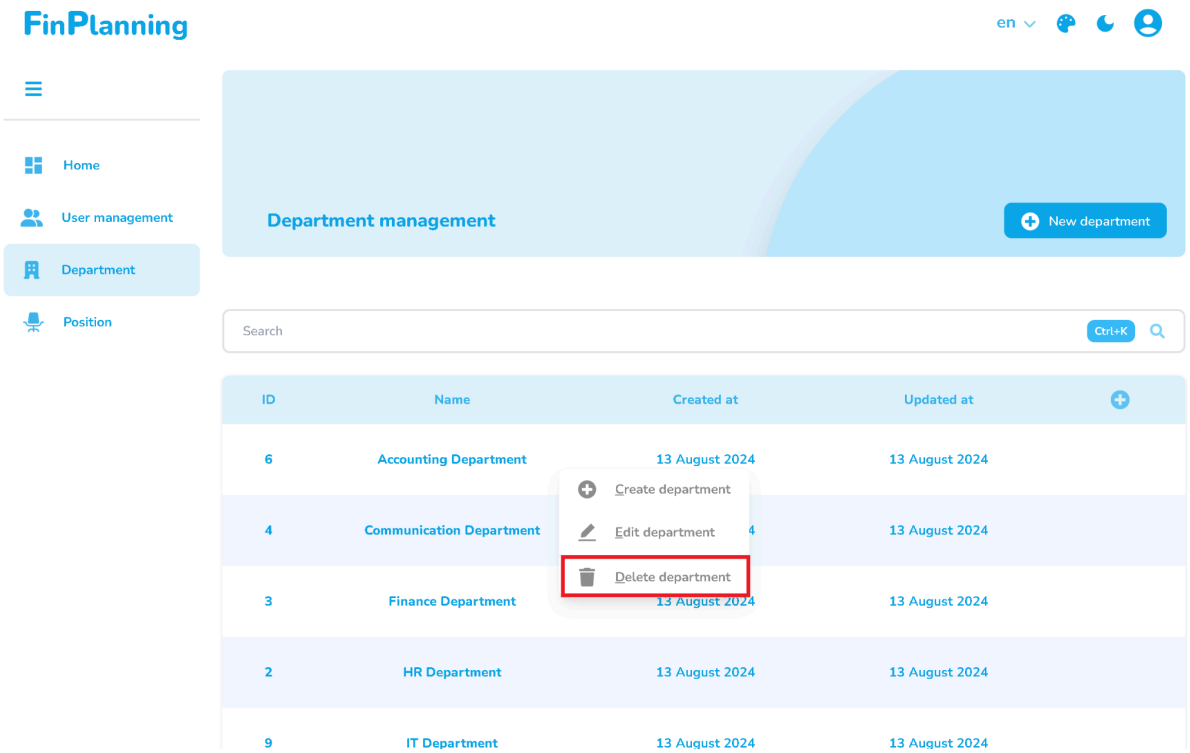
Step 1:Login using Admin account, after Home screen is displayed, click on “Department” on sidebar



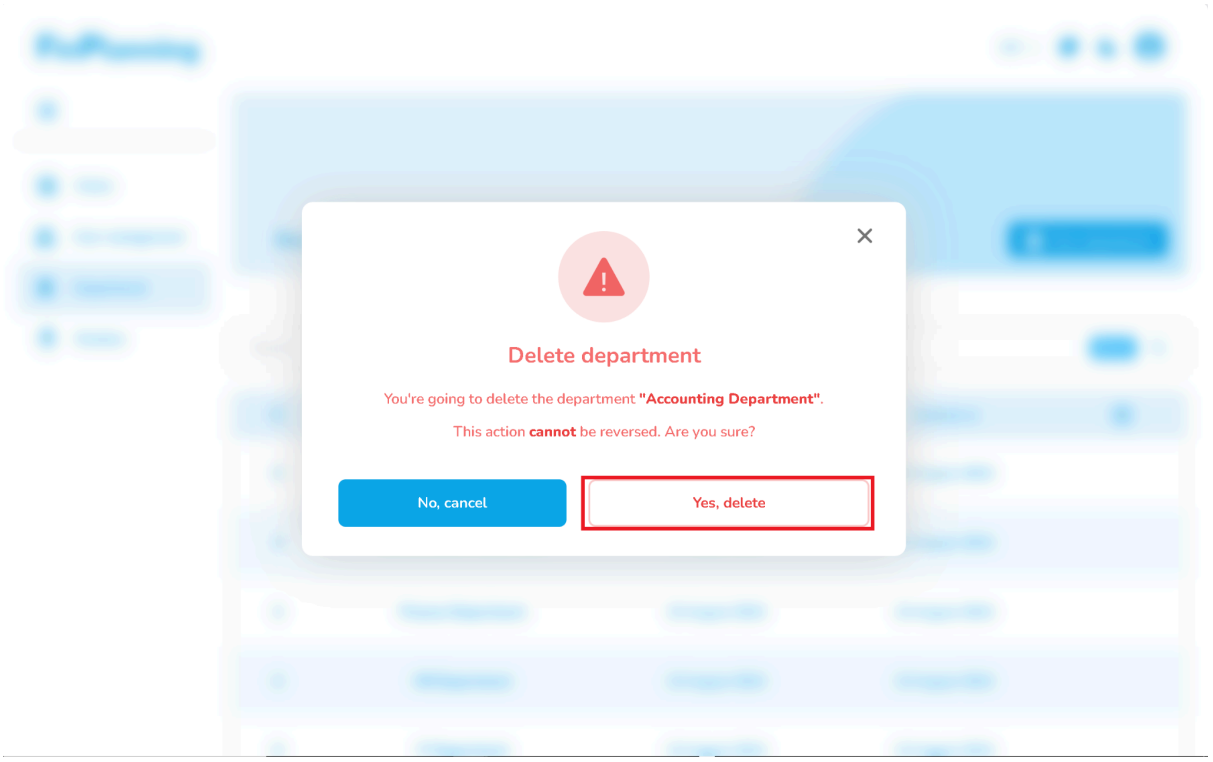
Step 2: Hover over department row which user want to delete, click on “Delete” icon



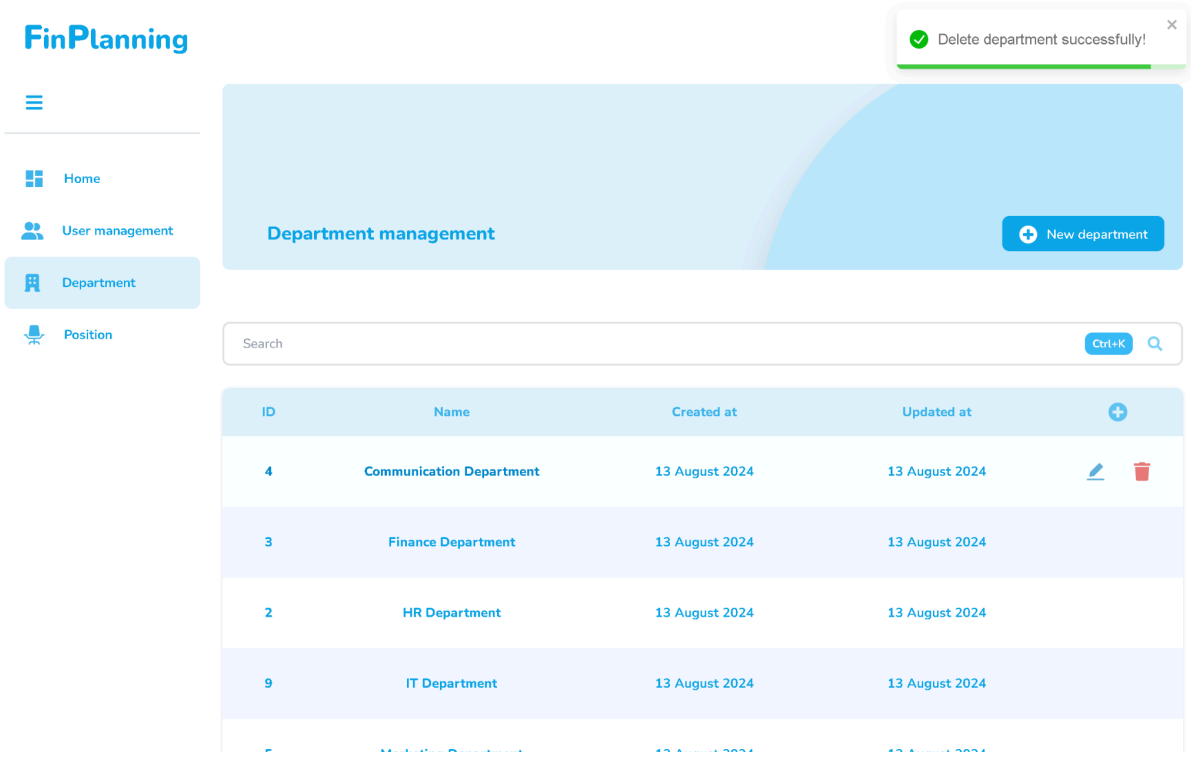
***Note:** User can right click on the row and click on “Delete department”



Step 3: A pop-up dialog for confirmation will be displayed, click on “Yes, delete”



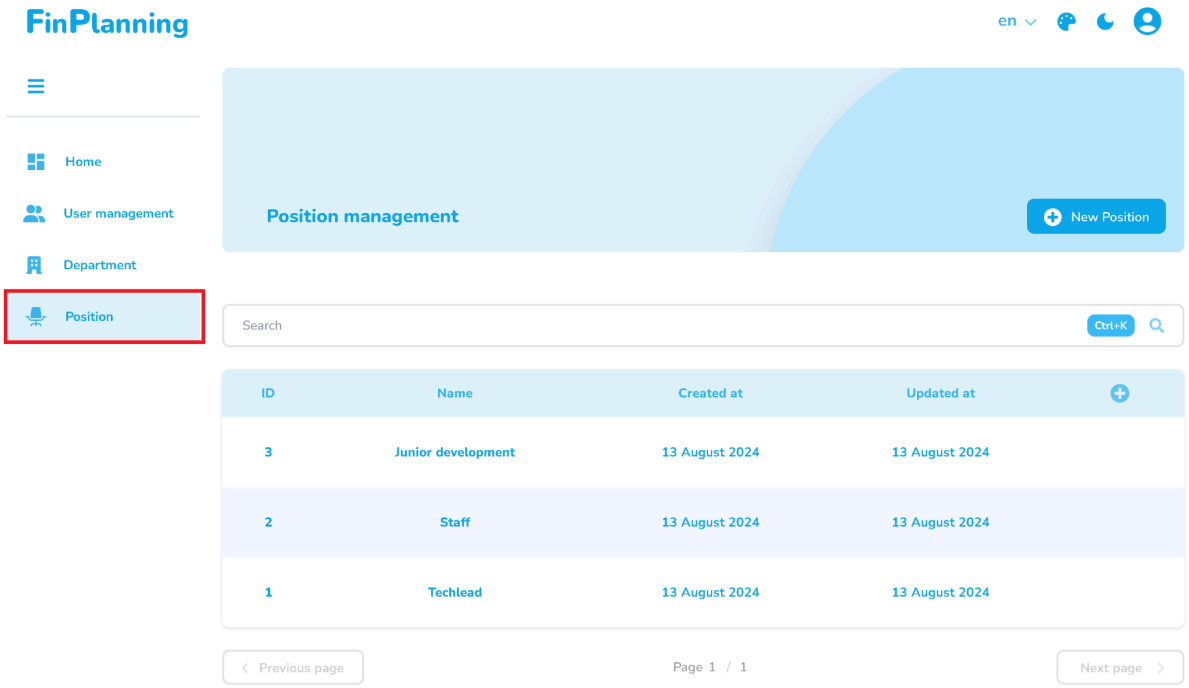
Step 4: A success message will be displayed and updated department list will be displayed



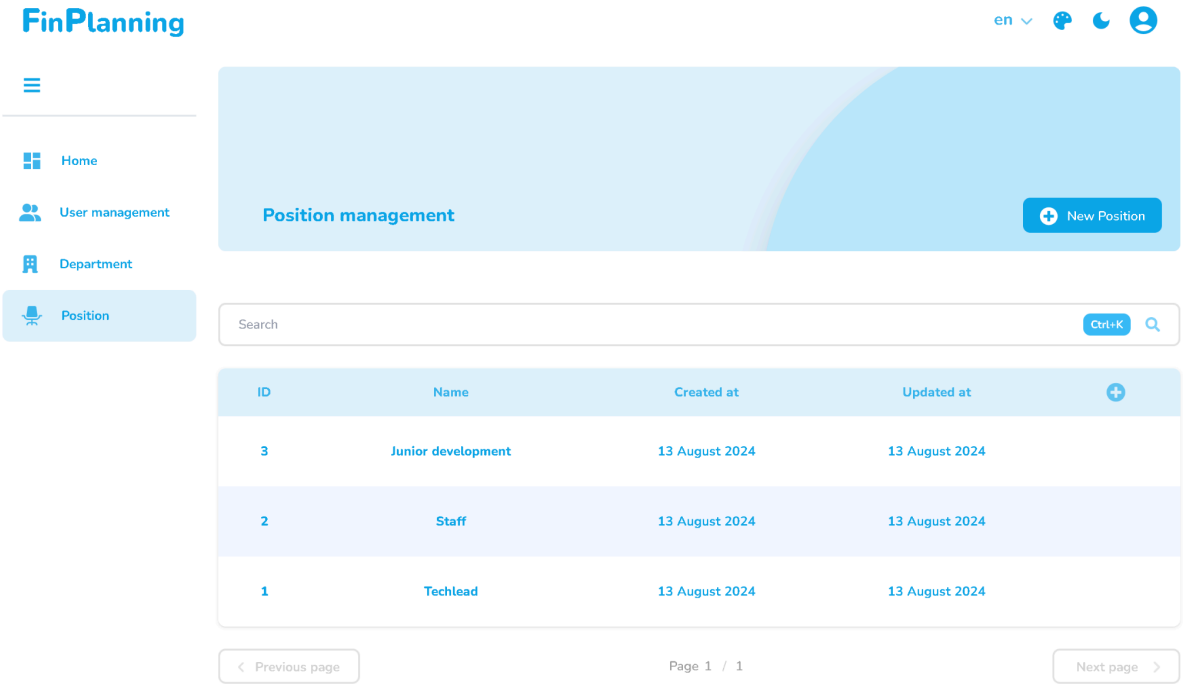
6.3.5.5 View position list (직위 목록 보기)

Role: Admin

Step 1: Login using Admin account, after Home screen is displayed, click on “Position” on sidebar



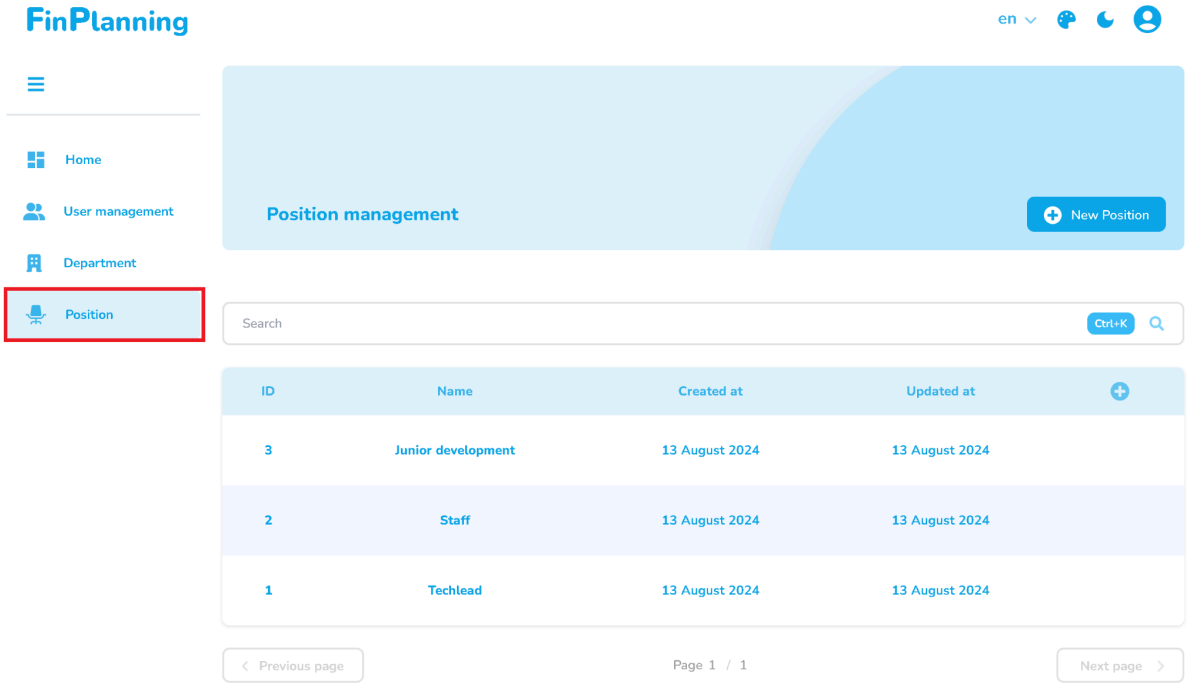
Step 2: Position list will be displayed



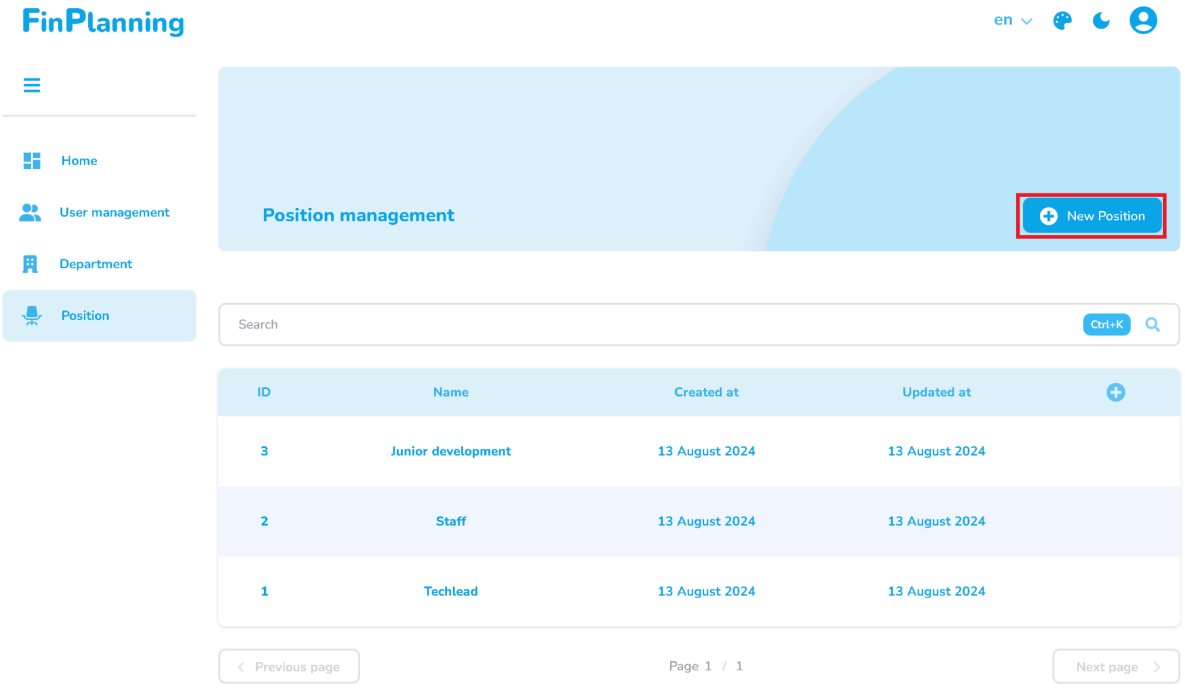
6.3.5.6 Create Position (직위 생성)

Role: Admin

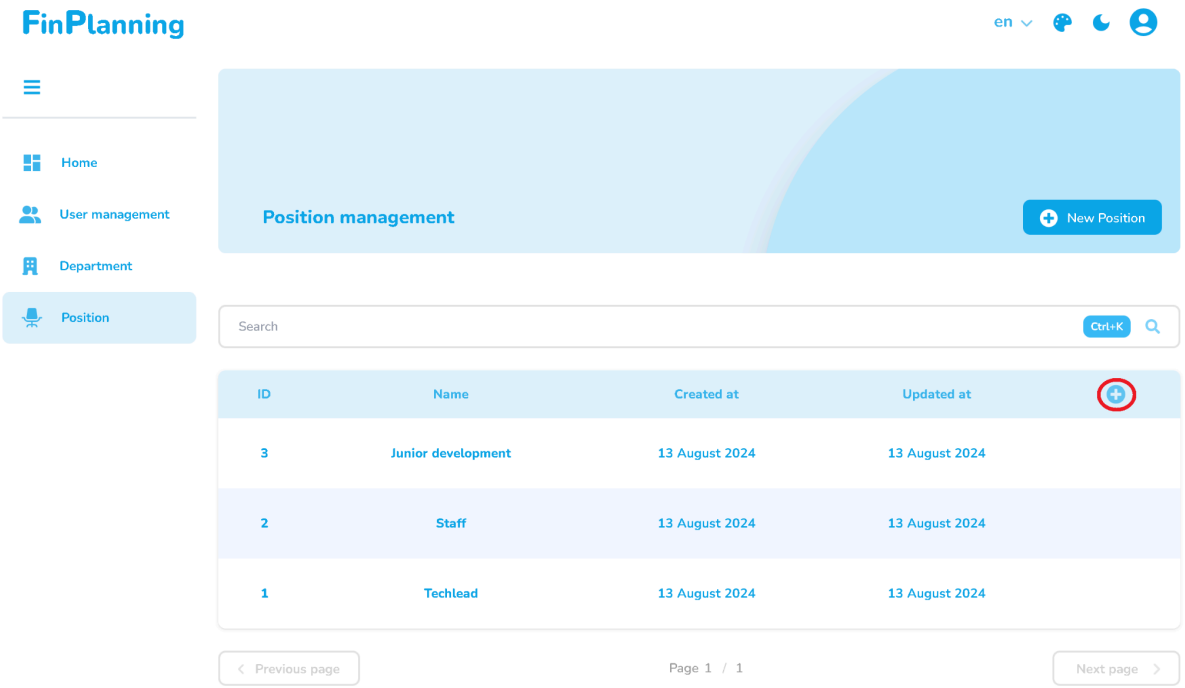
Step 1: Login using Admin account, after Home screen is displayed, click on “Position” on sidebar



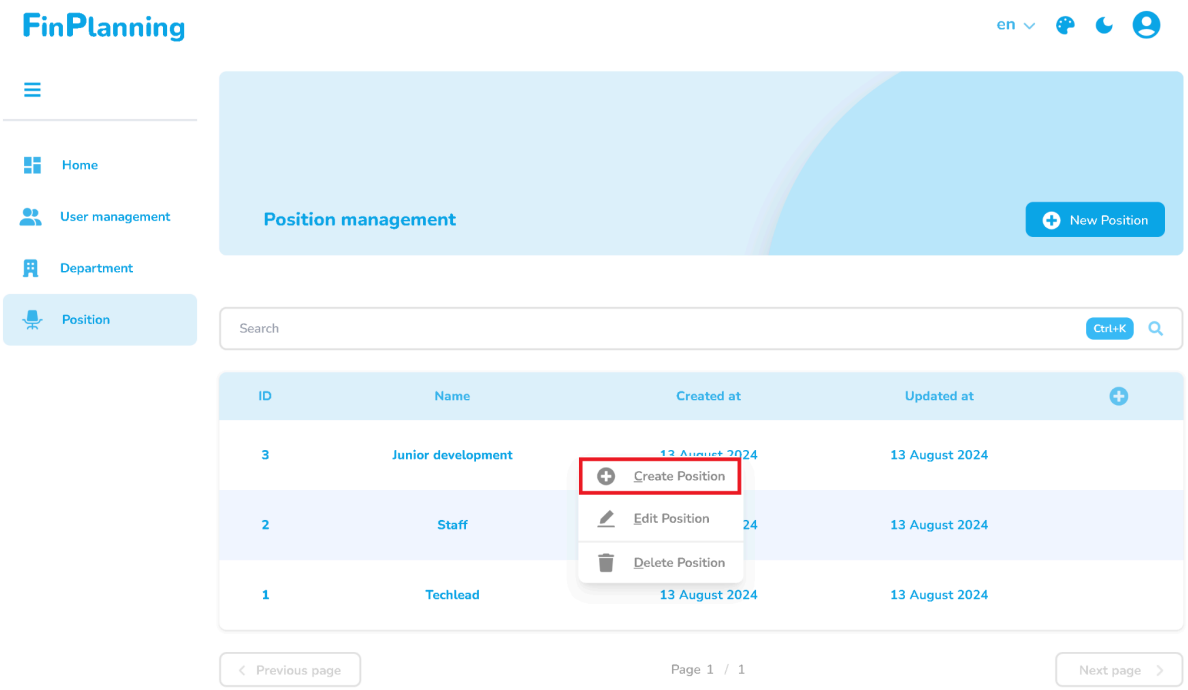
Step 2: Click on “New Position”



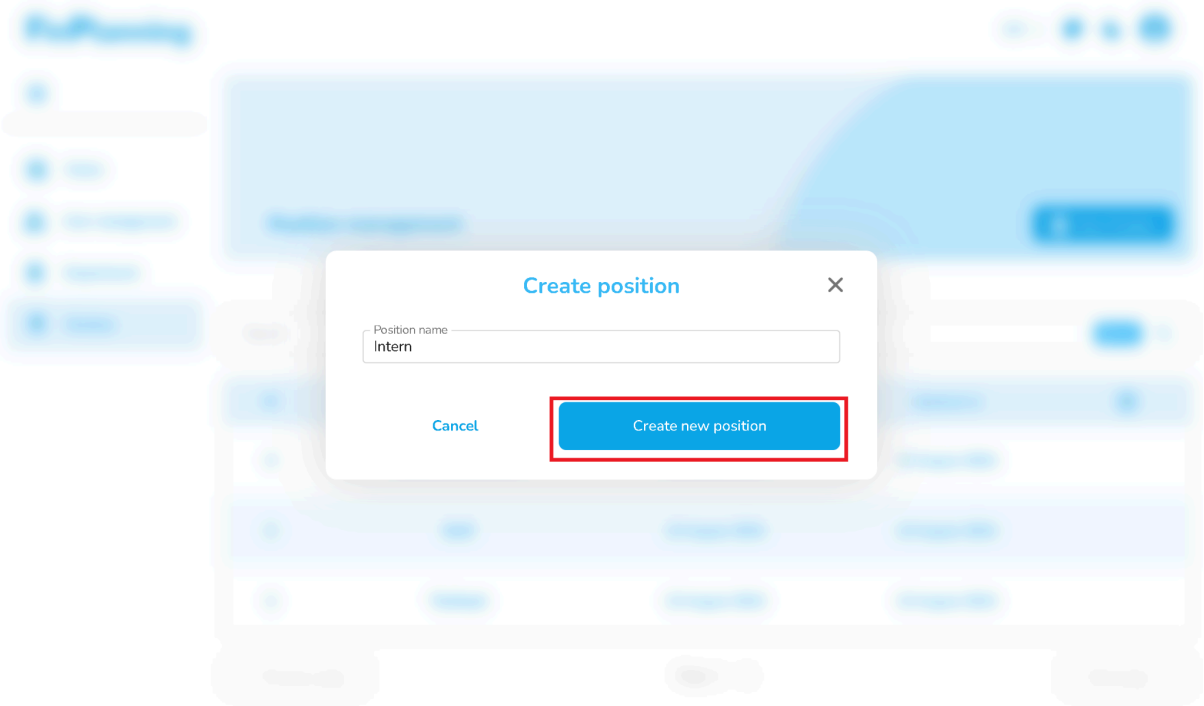
***Note:** User can also click on “+” button



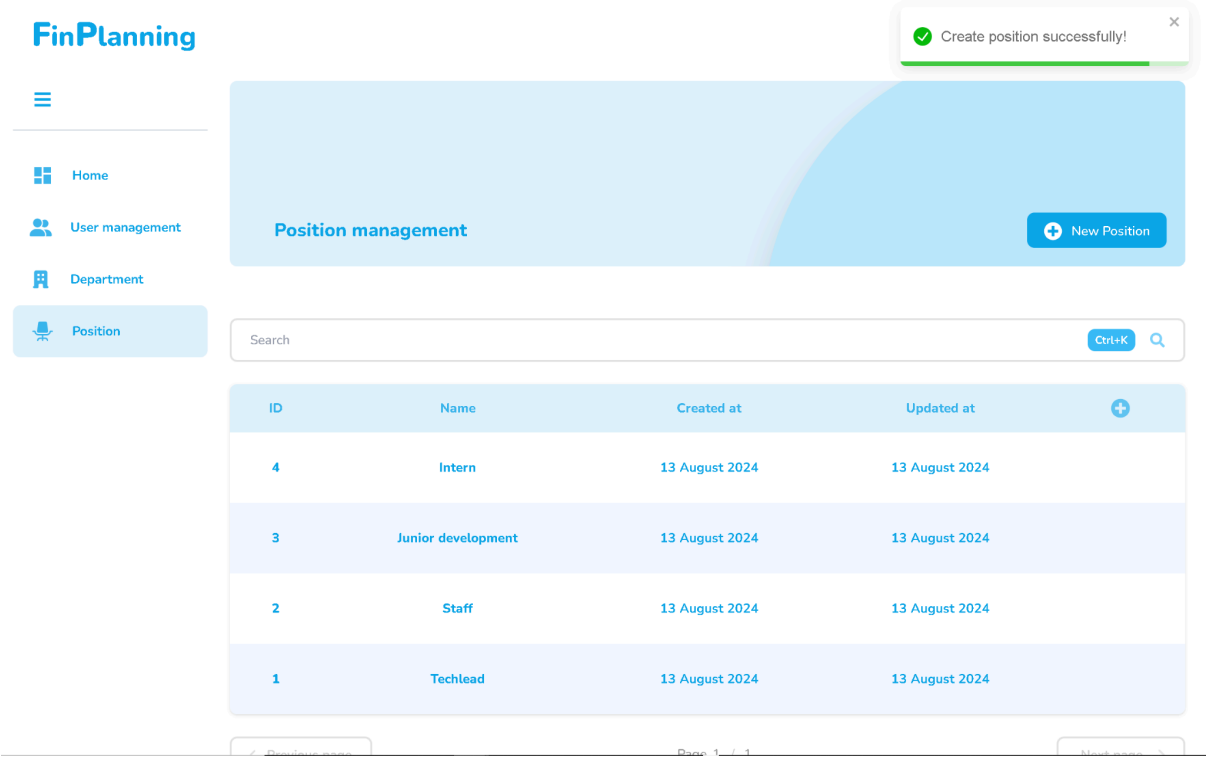
***Note:** User can also right click on position list and click on “Create position”



Step 3: A pop-up screen will appear, fill required field and click on “Create new position”



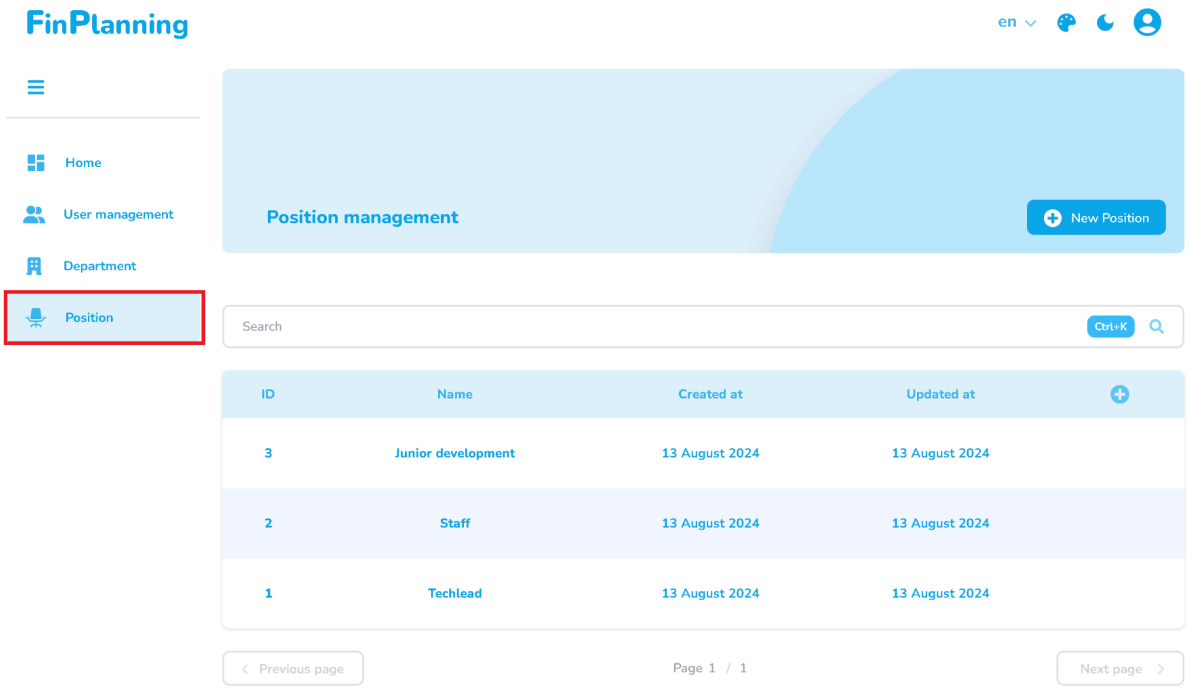
Step 4: A success message will appear, the position list is updated



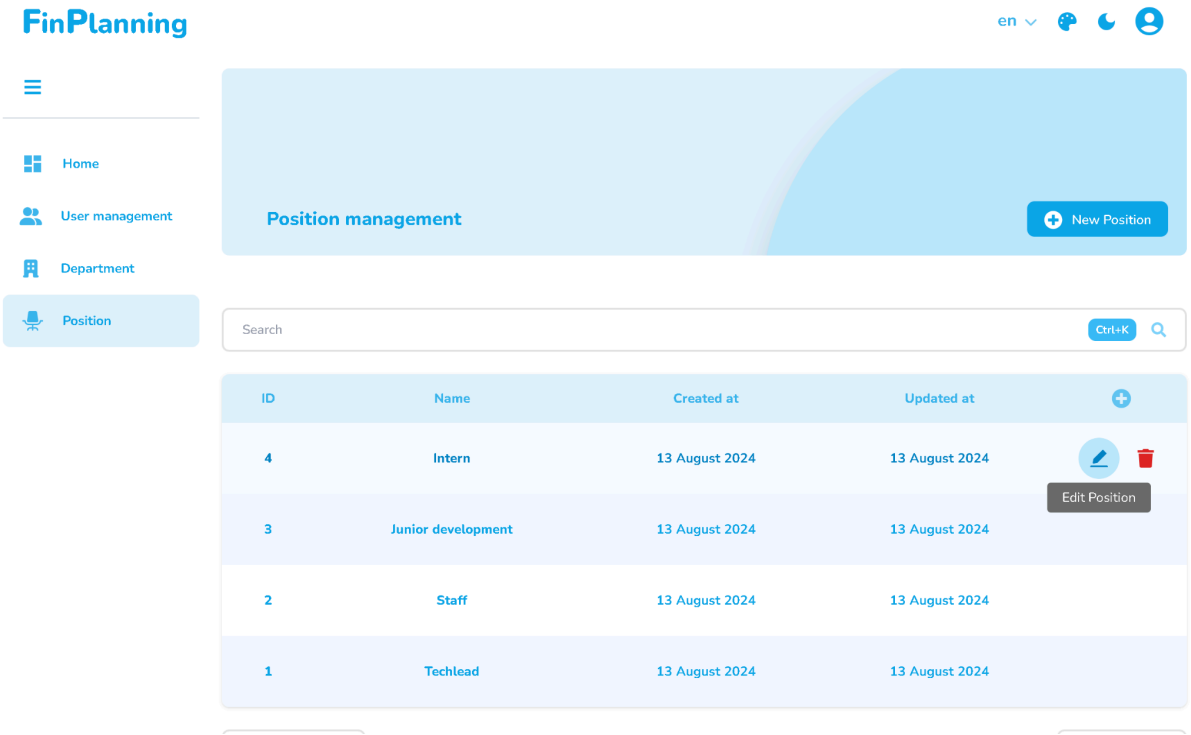
6.3.5.7 Edit position (직위 편집)

Role: Admin

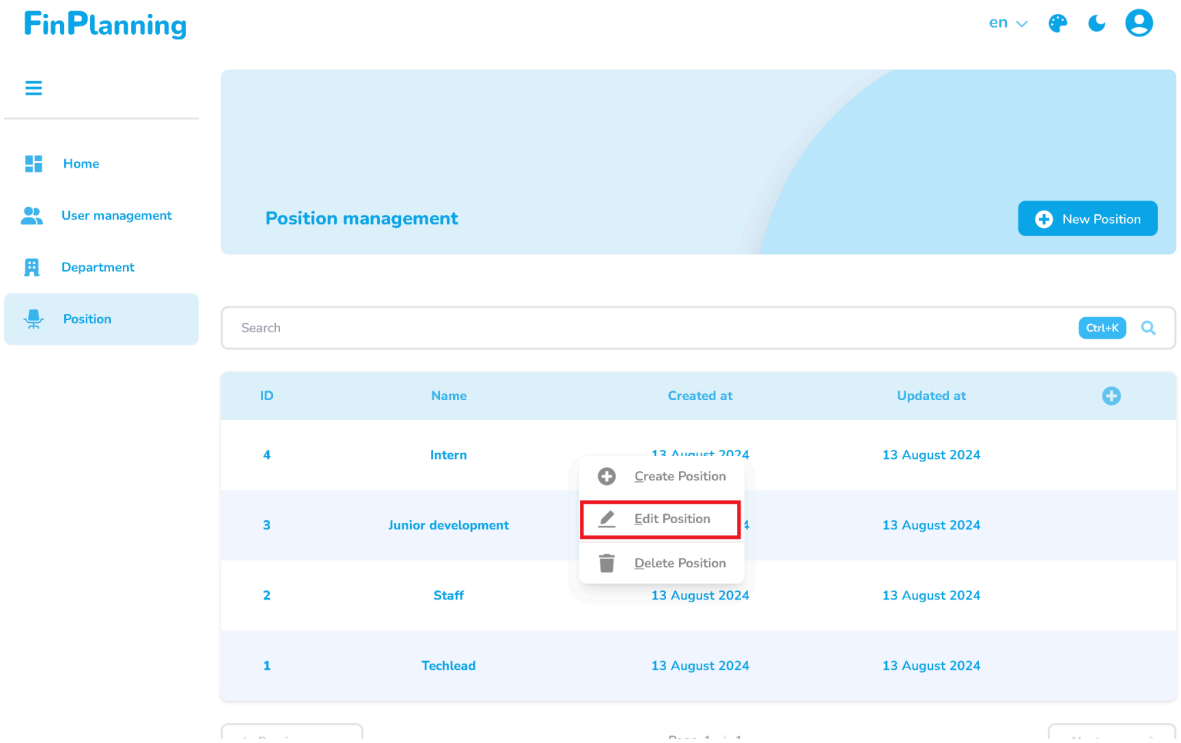
Step 1: Login using Admin account, after Home screen is displayed, click on “Position” on sidebar



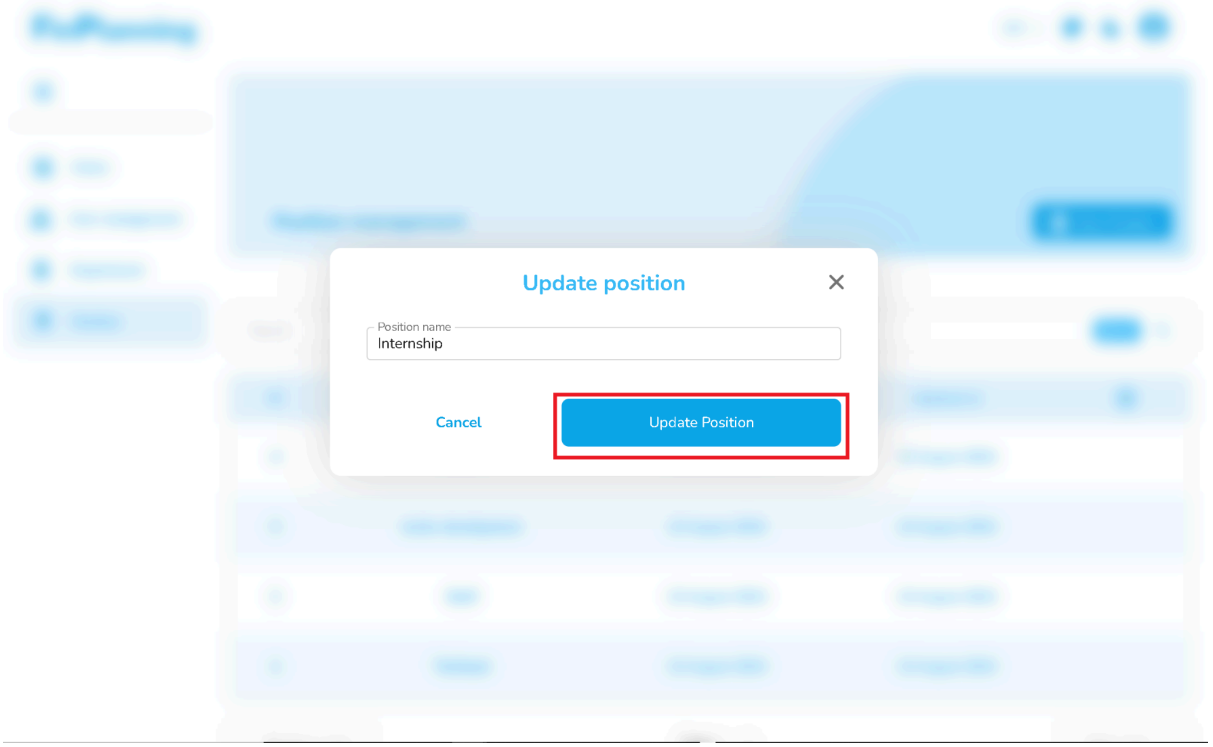
Step 2: Hover over position row which user want to edit, click on “Edit” icon



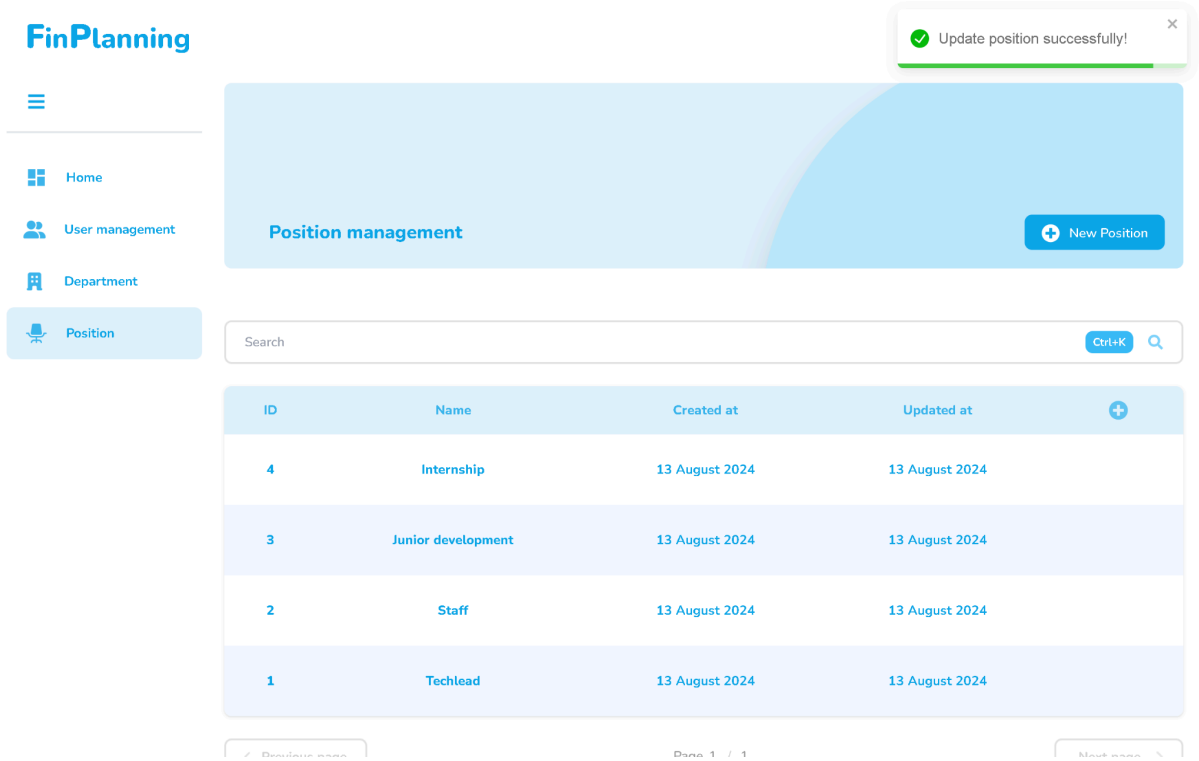
***Note:** User can right click on the row and click on “Edit position”



Step 3:A pop-up screen will appear, fill required field and click on “Update position”



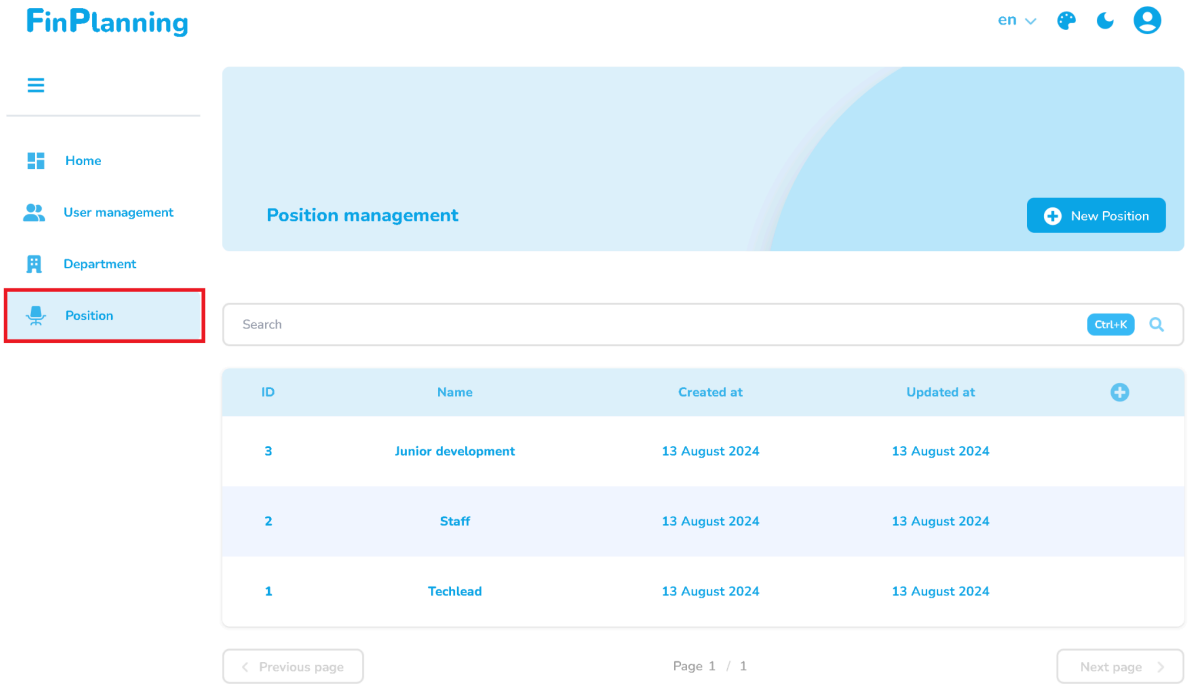
Step 4: A success message will appear, and position list is updated



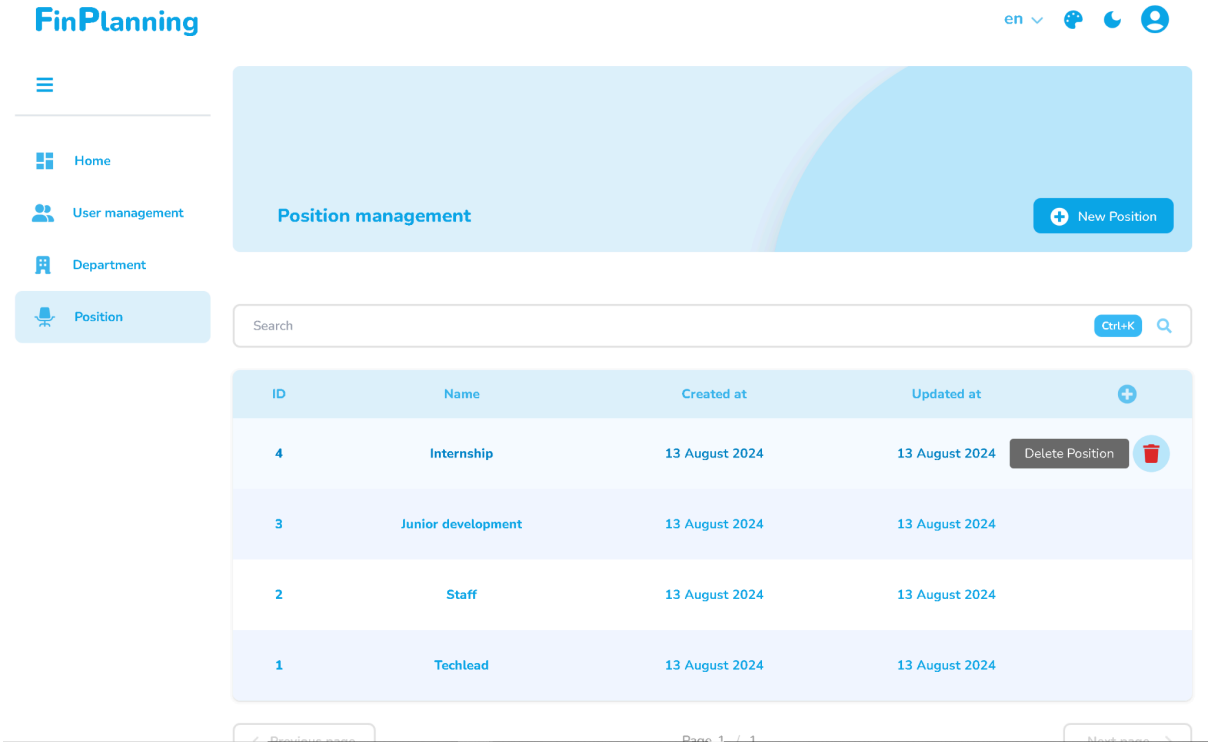
6.3.5.8 Delete position (직위 삭제)

Role: Admin

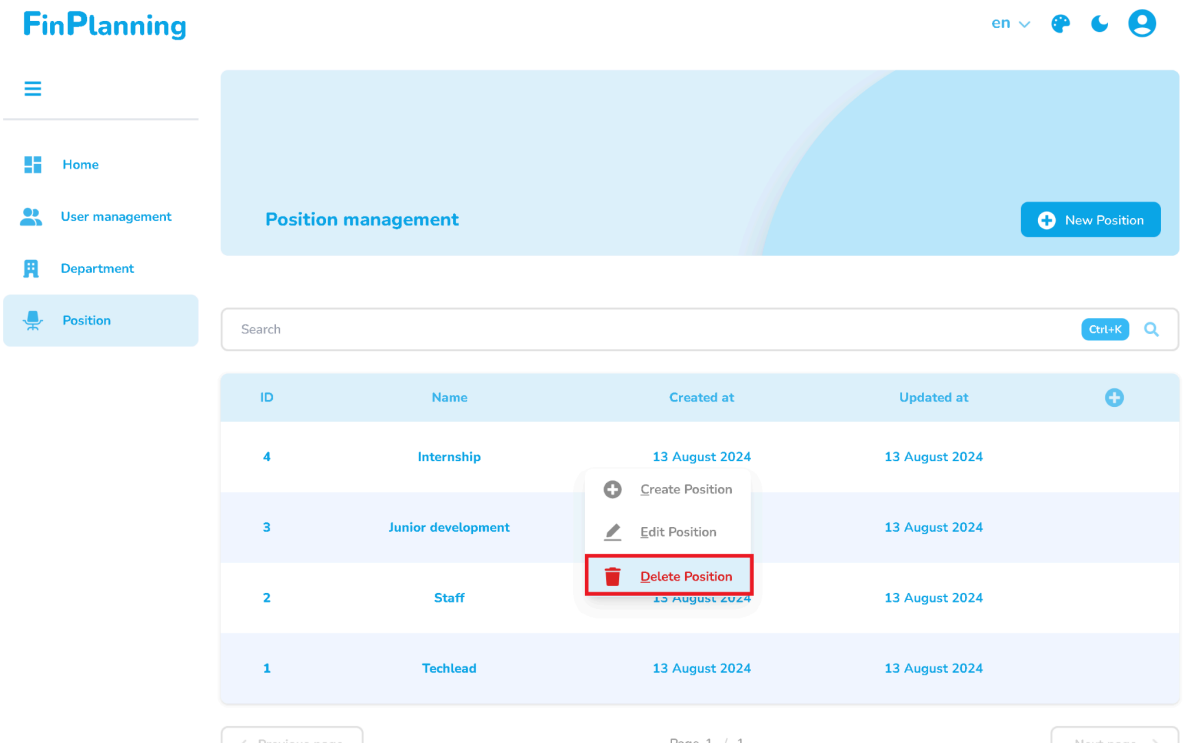
Step 1:Login using Admin account, after Home screen is displayed, click on “Position” on sidebar



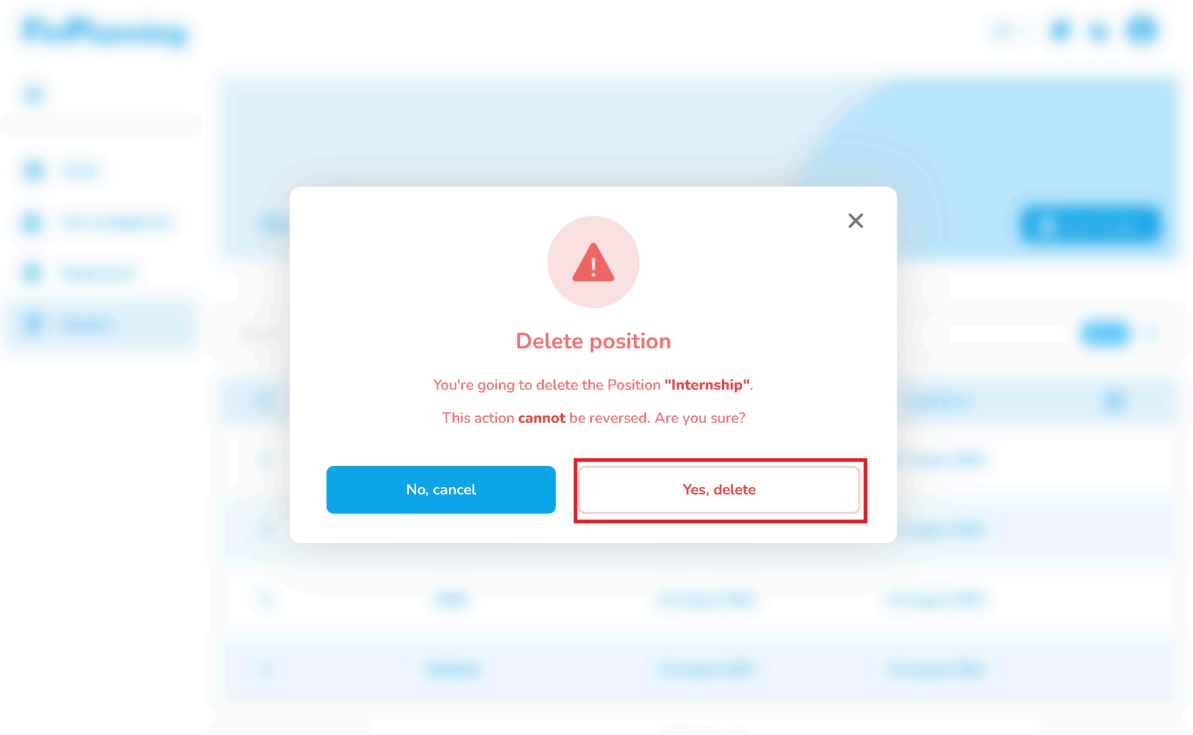
Step 2: Hover over position row which user want to delete, click on “Delete” icon



***Note:** User can right click on the row and click on “Delete position”



Step 3: A pop-up dialog for confirmation will be displayed, click on “Yes, delete”



Step 4: A success message will be displayed and updated department list will be displayed

FinPlanning

Delete position successfully!

- Home
- User management
- Department
- Position

Position management

New Position

Search Ctrl+K

ID	Name	Created at	Updated at
3	Junior development	13 August 2024	13 August 2024
2	Staff	13 August 2024	13 August 2024
1	Techlead	13 August 2024	13 August 2024

Previous page

Page 1 / 1

Next page

6.3.6 Workflow Term Management (기간 관리 워크플로우)

6.3.6.1 Create term (기간 생성)

6.3.6.2 Edit term (기간 편집)

6.3.6.3 Start term (기간 시작)

6.3.6.4 Delete term (기간 삭제)

6.3.6.5 View term list (기간 목록 보기)

6.3.6.6 View term details (기간 세부 정보 보기)

6.3.7 Workflow Report Management (보고서 관리 워크플로우)

6.3.7.1 View report list (보고서 목록 보기)

6.3.7.2 View report details (보고서 세부 정보 보기)

6.3.7.3 Export report (보고서 내보내기)

6.3.7.4 Upload review report (검토 보고서 업로드)

6.3.8 Workflow Annual Report (연간 보고서 워크플로우)

6.3.8.1 View annual report list (연간 보고서 목록 보기)

6.3.8.2 View annual report details (연간 보고서 세부 정보 보기)

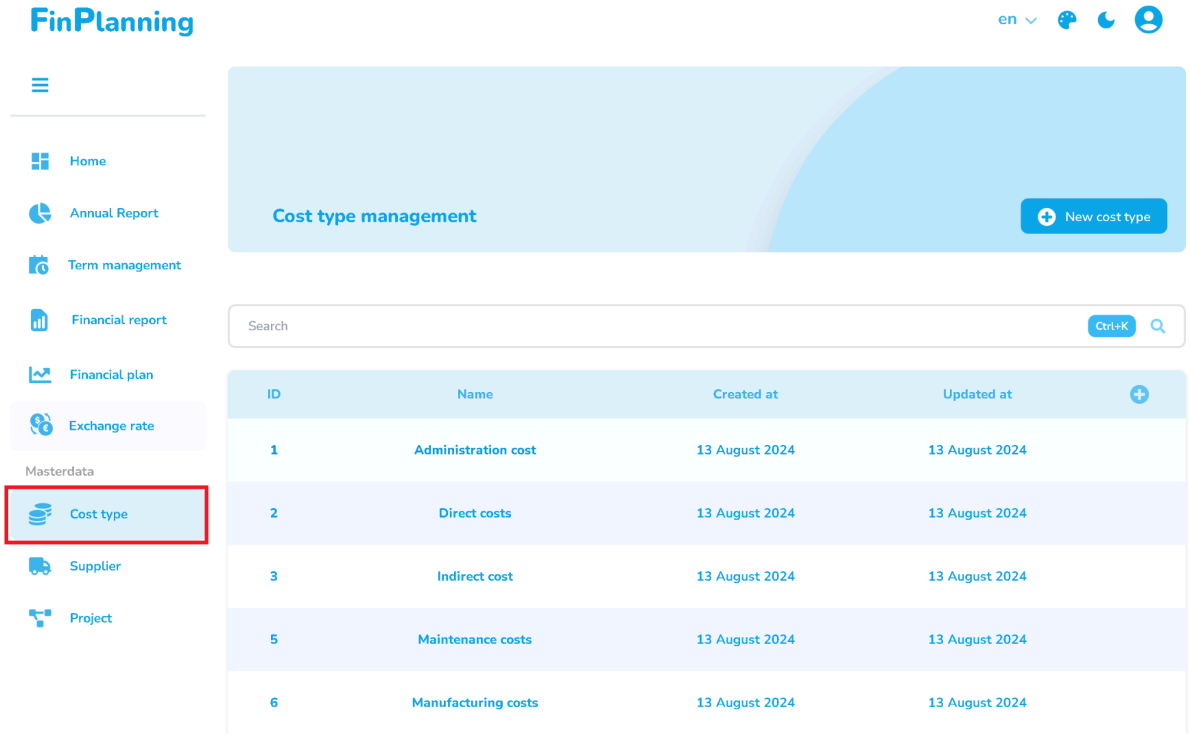
6.3.8.3 Export annual report (연간 보고서 내보내기)

6.3.9 Workflow Master Data (Accountant) (마스터 데이터 워크플로우 - 회계 담당자)

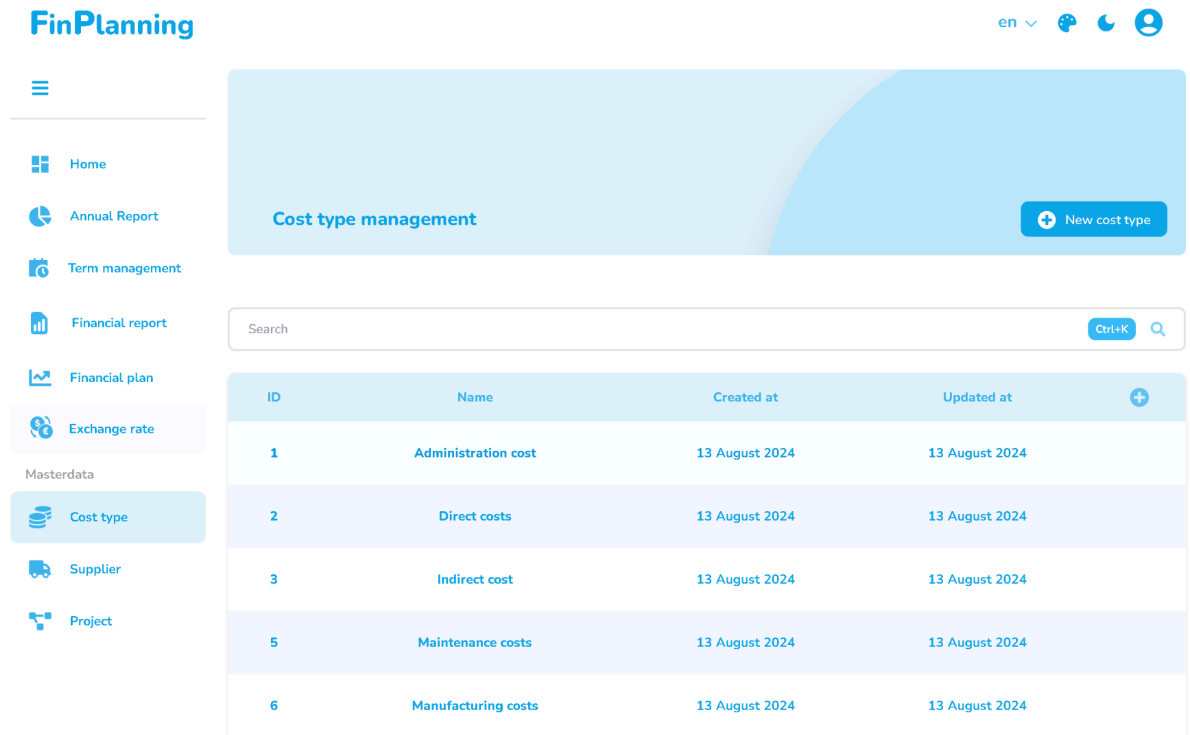
6.3.9.1 View cost type list (비용 유형 목록 보기)

Role: Accountant

Step 1: Login using Accountant account, after Home screen is displayed, clicked on “Cost type” on sidebar



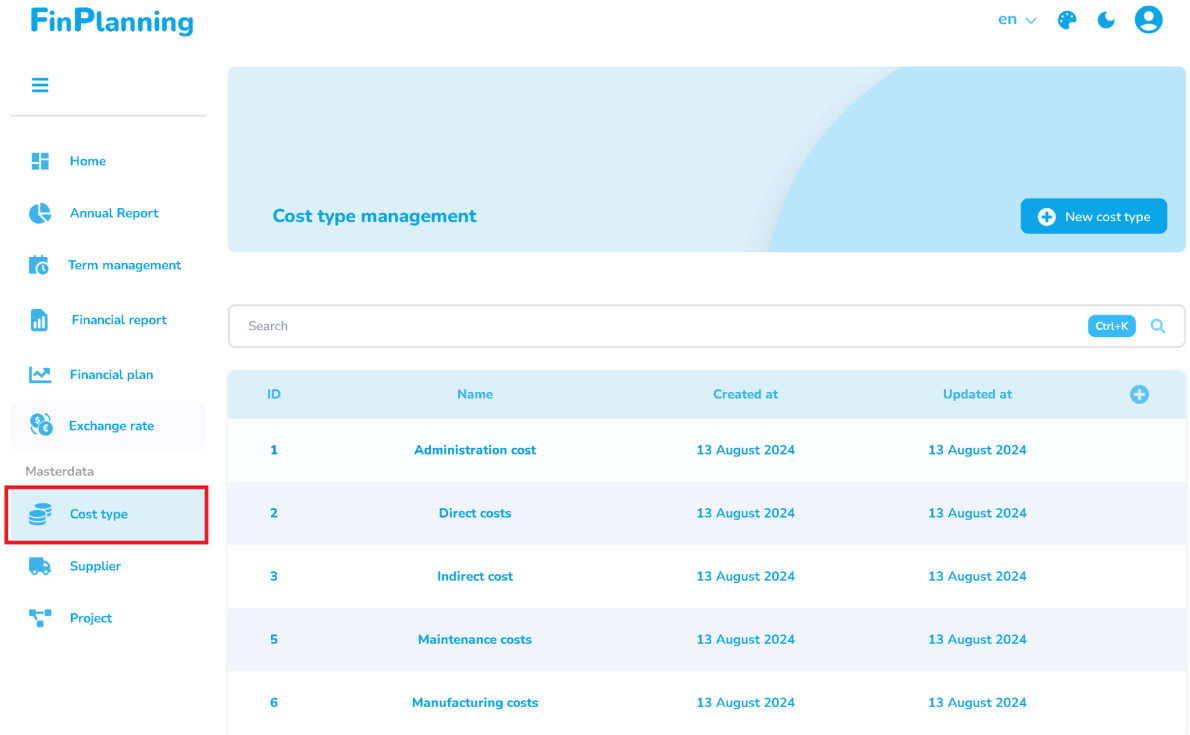
Step 2: Cost type list is displayed



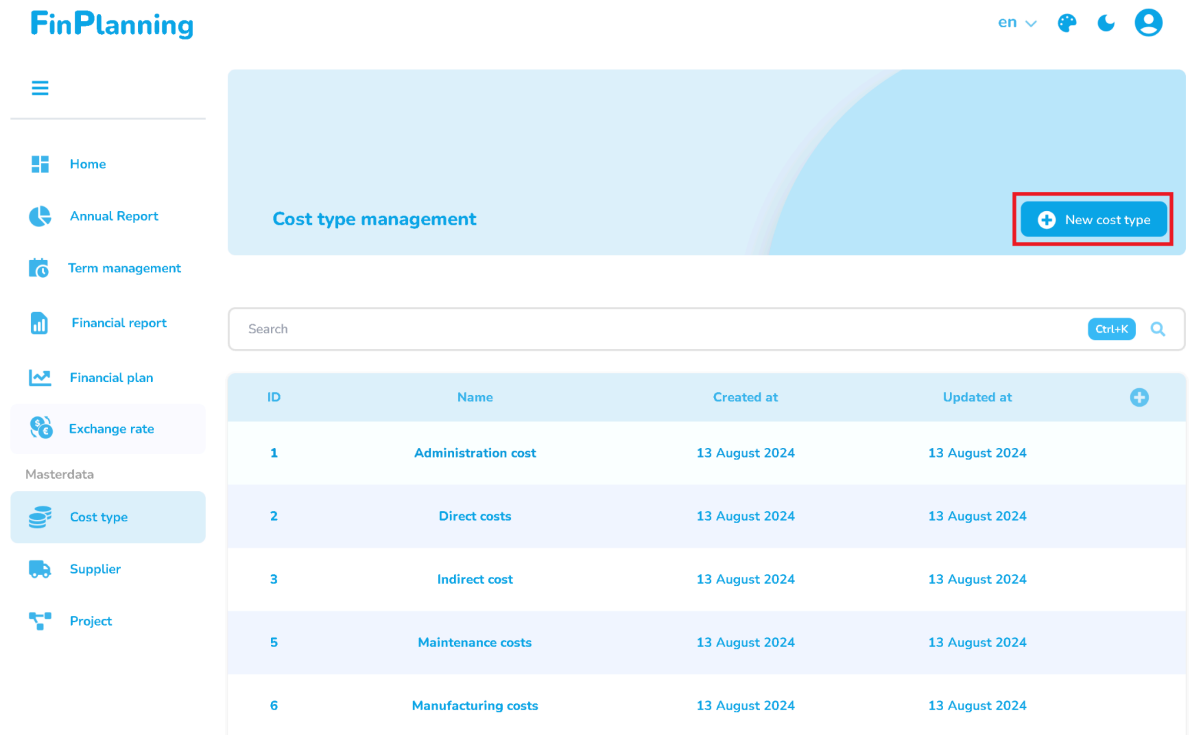
6.3.9.2 Create cost type (비용 유형 생성)

Role: Accountant

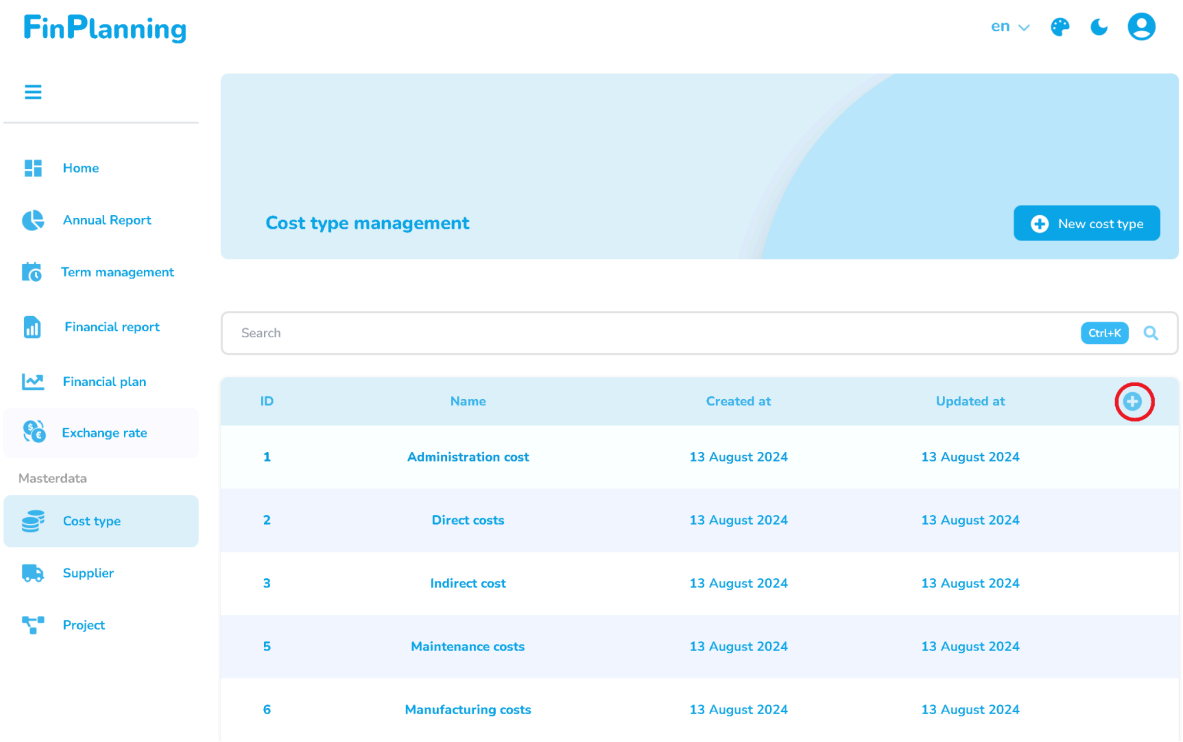
Step 1: Login using Accountant account, after Home screen is displayed, clicked on “Cost type” on sidebar



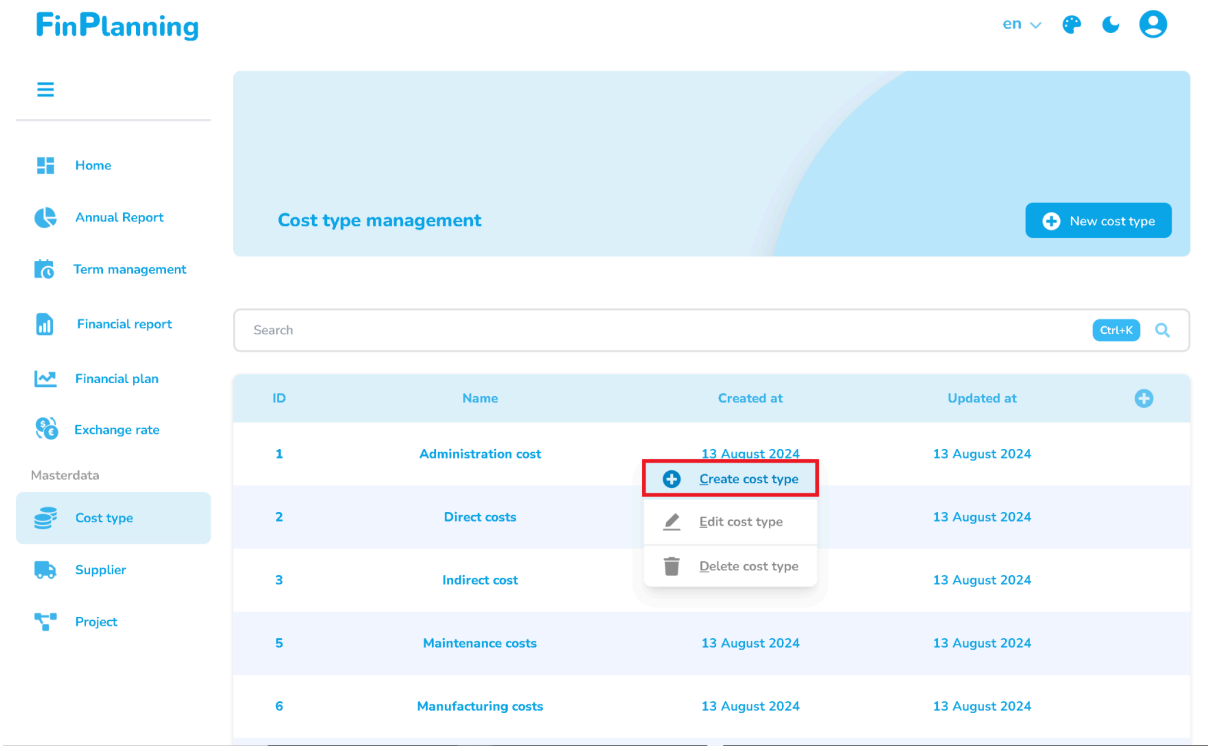
Step 2: Click on “New cost type”



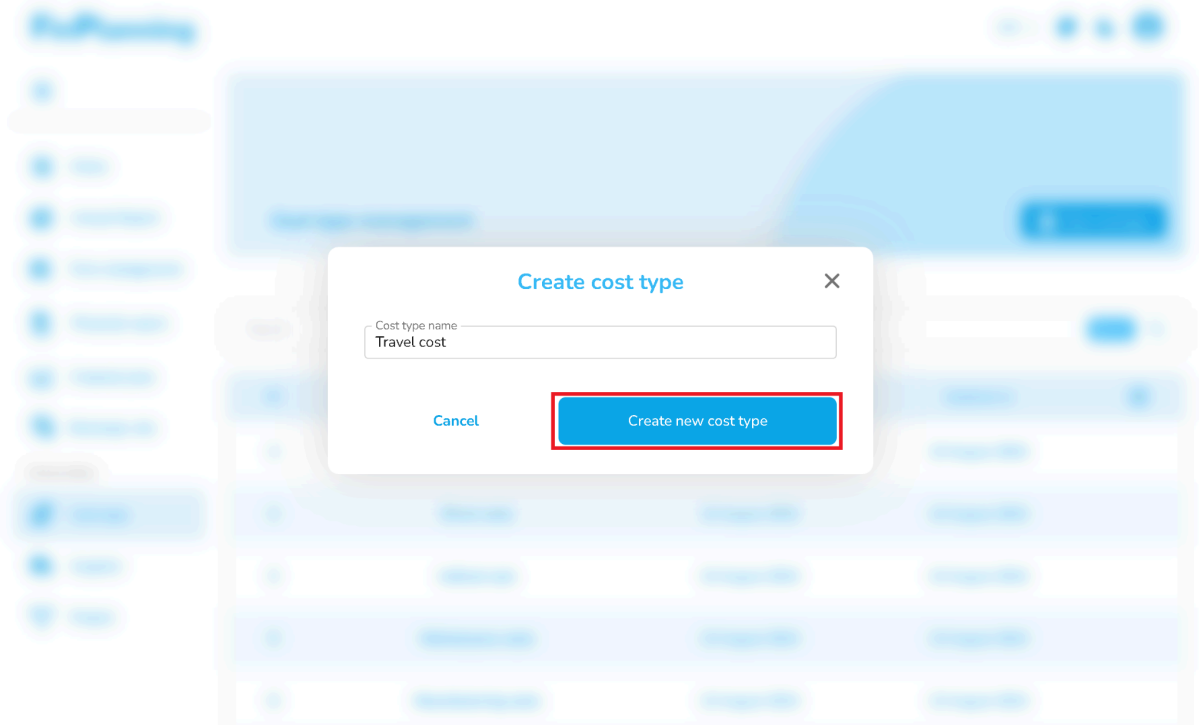
***Note:** User can also click on “+” button



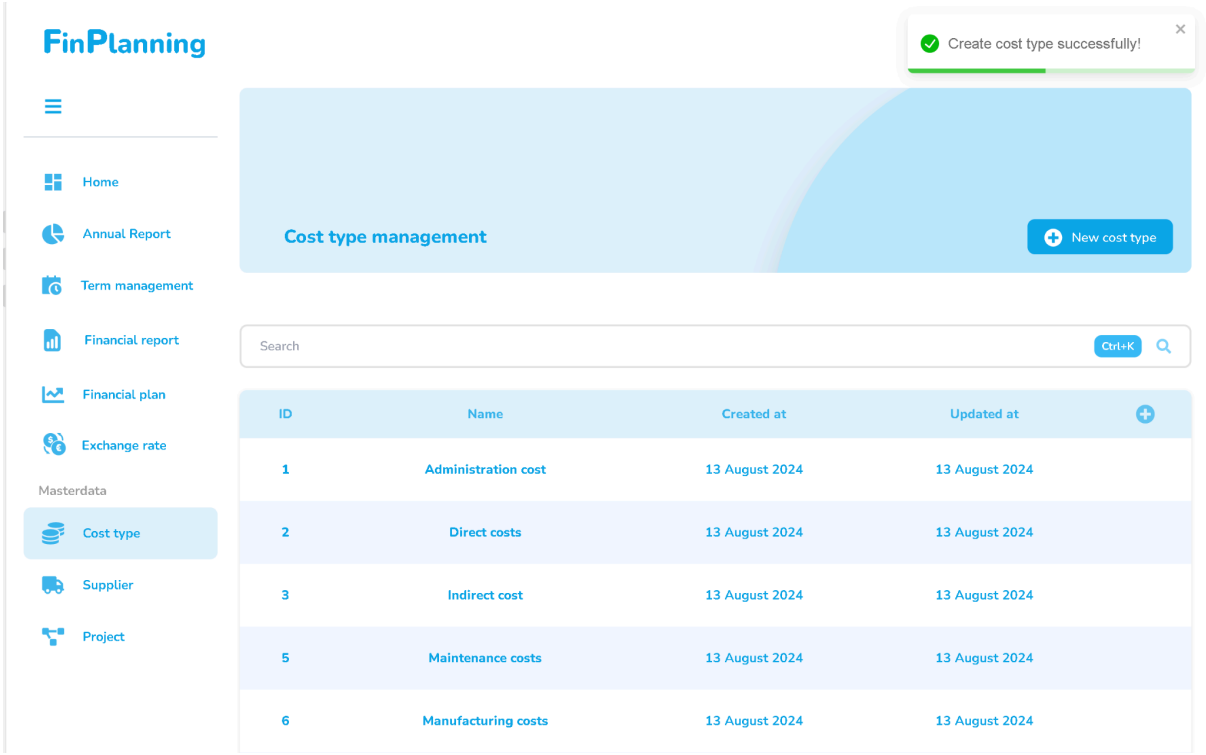
***Note:** User can also right click on cost type list then click on “Create cost type”



Step 3:



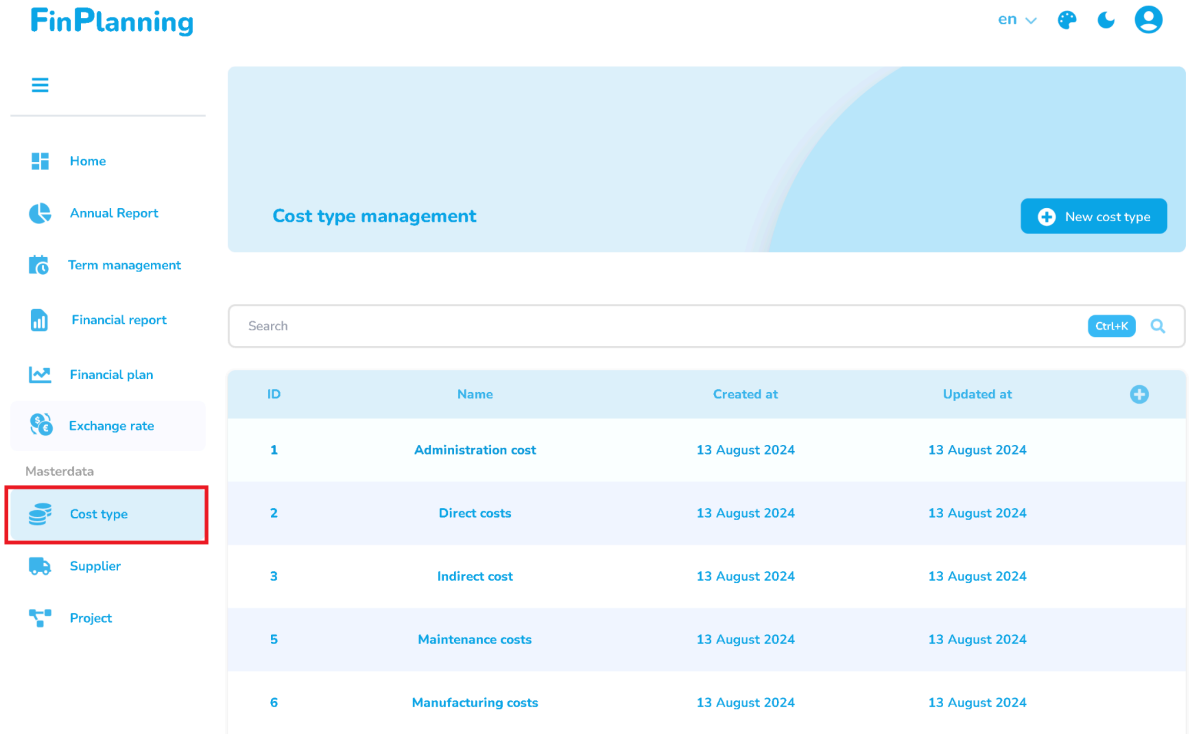
Step 4:



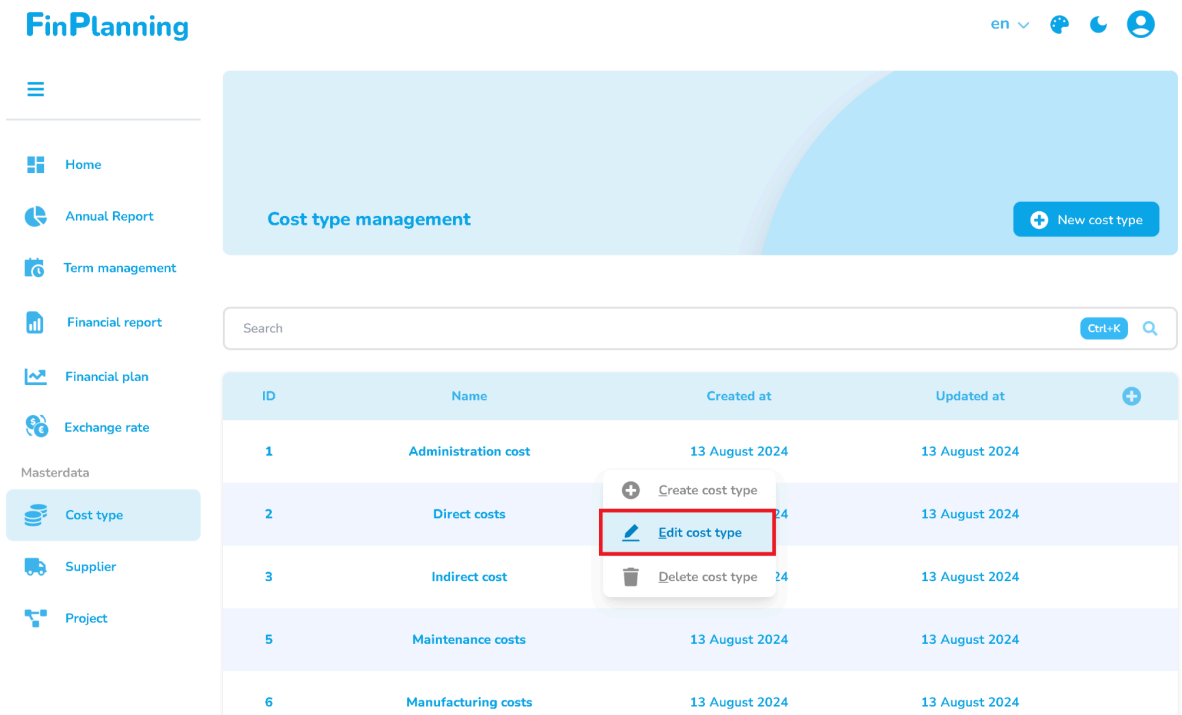
6.3.9.3 Edit cost type (비용 유형 편집)

Role: Accountant

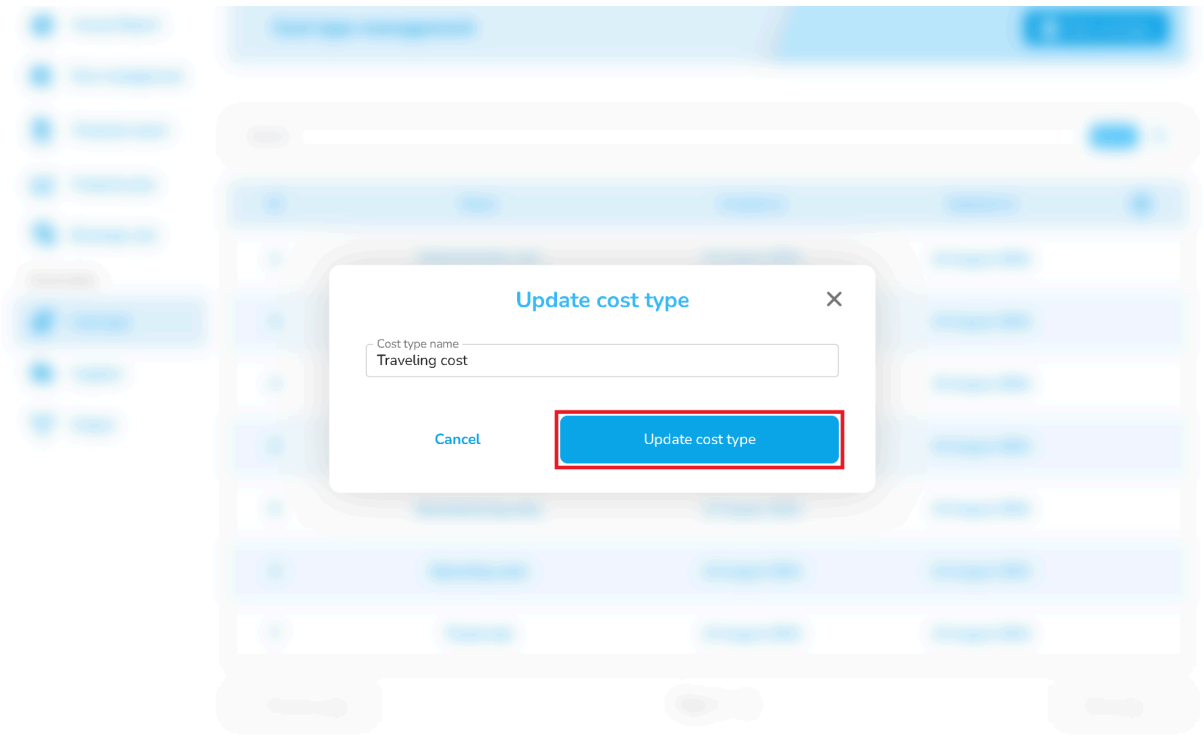
Step 1:


FinPlanning
en
Home
Annual Report
Term management
Financial report
Financial plan
Exchange rate
Masterdata
Cost type
Supplier
Project
Cost type management
New cost type
Search
Ctrl+K
ID
Name
Created at
Updated at
1
Administration cost
13 August 2024
13 August 2024
2
Direct costs
13 August 2024
13 August 2024
3
Indirect cost
13 August 2024
13 August 2024
5
Maintenance costs
13 August 2024
13 August 2024
6
Manufacturing costs
13 August 2024
13 August 2024

Step 2:


FinPlanning
en
Home
Annual Report
Term management
Financial report
Financial plan
Exchange rate
Masterdata
Cost type
Supplier
Project
Cost type management
New cost type
Search
Ctrl+K
ID
Name
Created at
Updated at
1
Administration cost
13 August 2024
13 August 2024
2
Direct costs
13 August 2024
3
Indirect cost
13 August 2024
5
Maintenance costs
13 August 2024
13 August 2024
6
Manufacturing costs
13 August 2024
13 August 2024
Create cost type
Edit cost type
Delete cost type

Step 3:

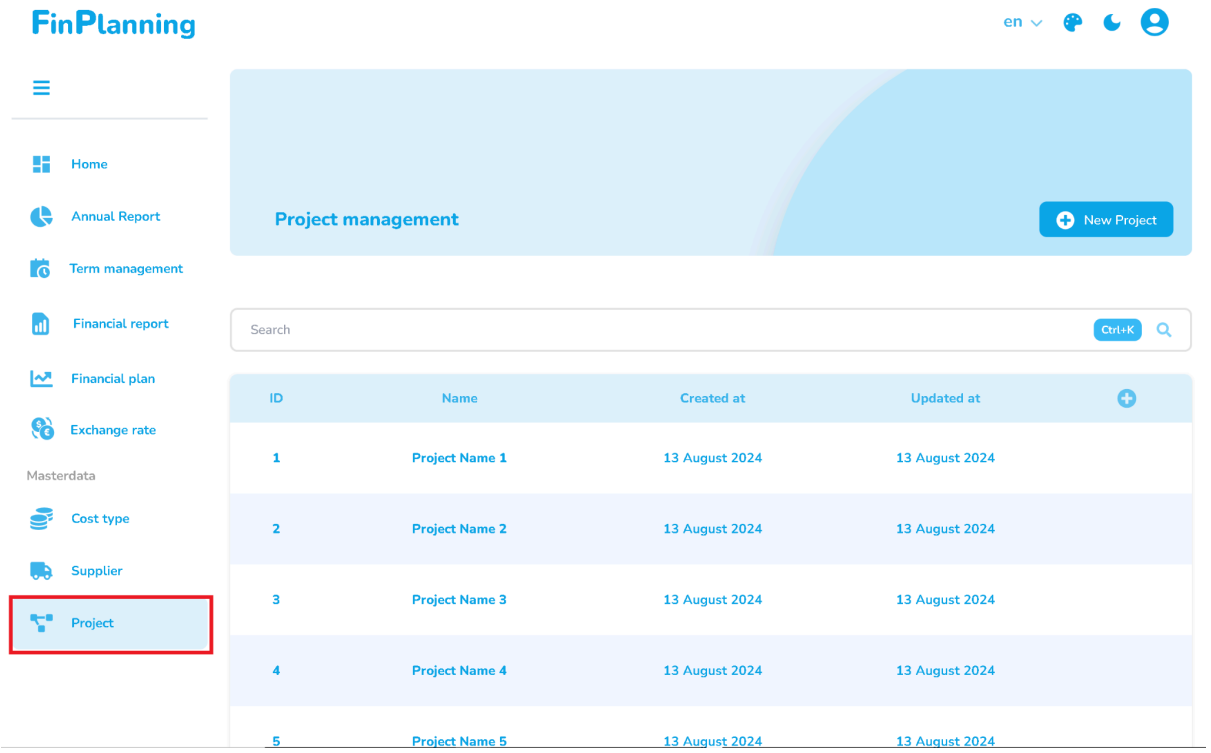


6.3.9.4 Delete cost type (비용 유형 삭제)

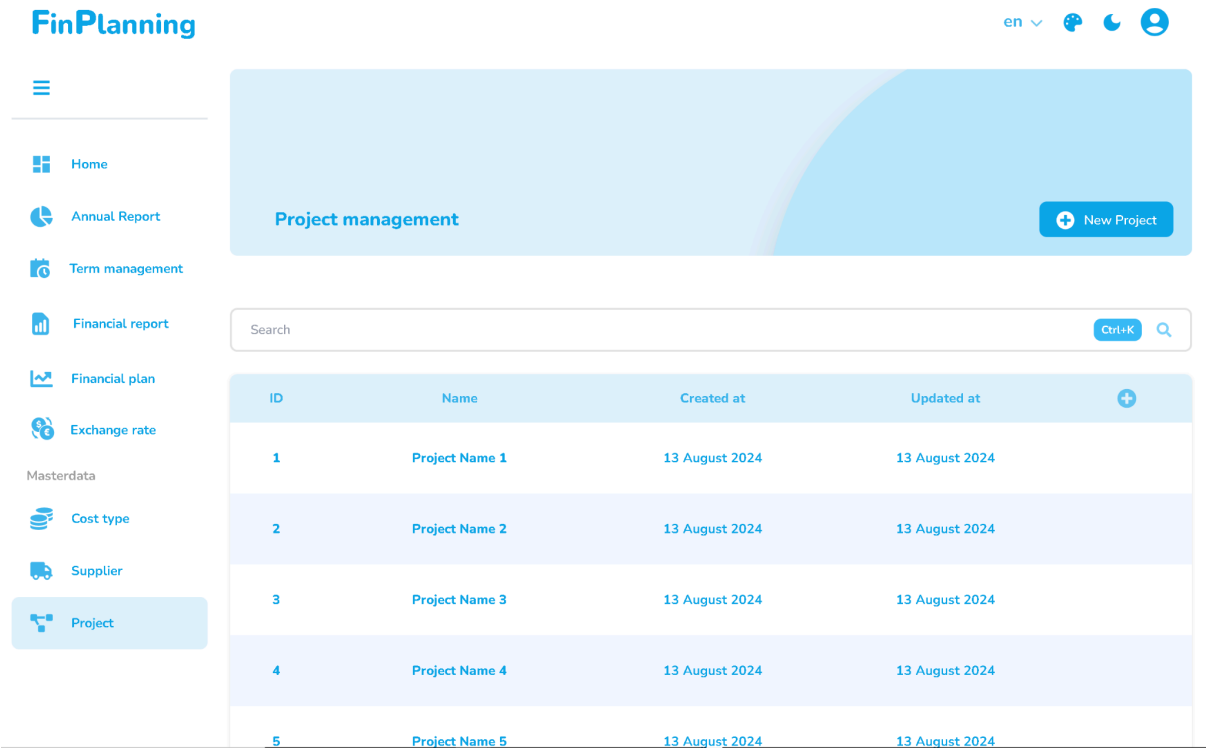
6.3.9.5 View project list (프로젝트 목록 보기)

Role: Accountant

Step 1: Login as Accountant, after Home screen is displayed, click on “Project” on sidebar



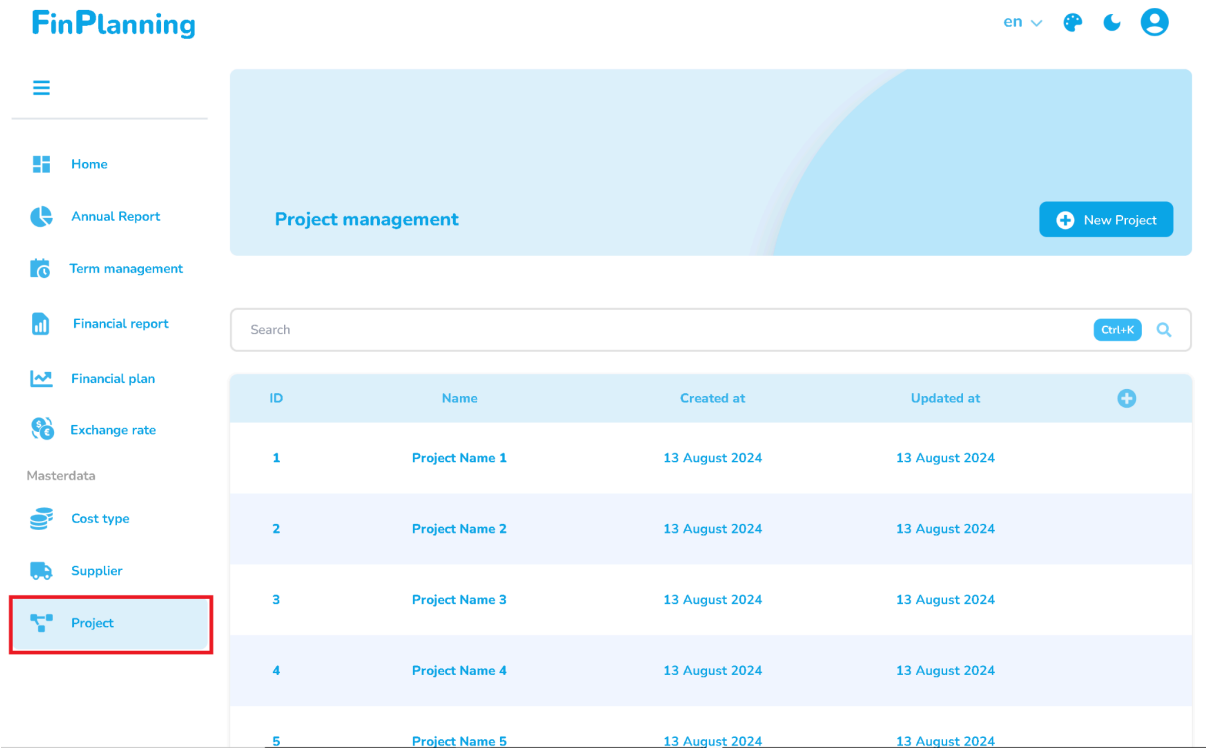
Step 2: Project list is displayed



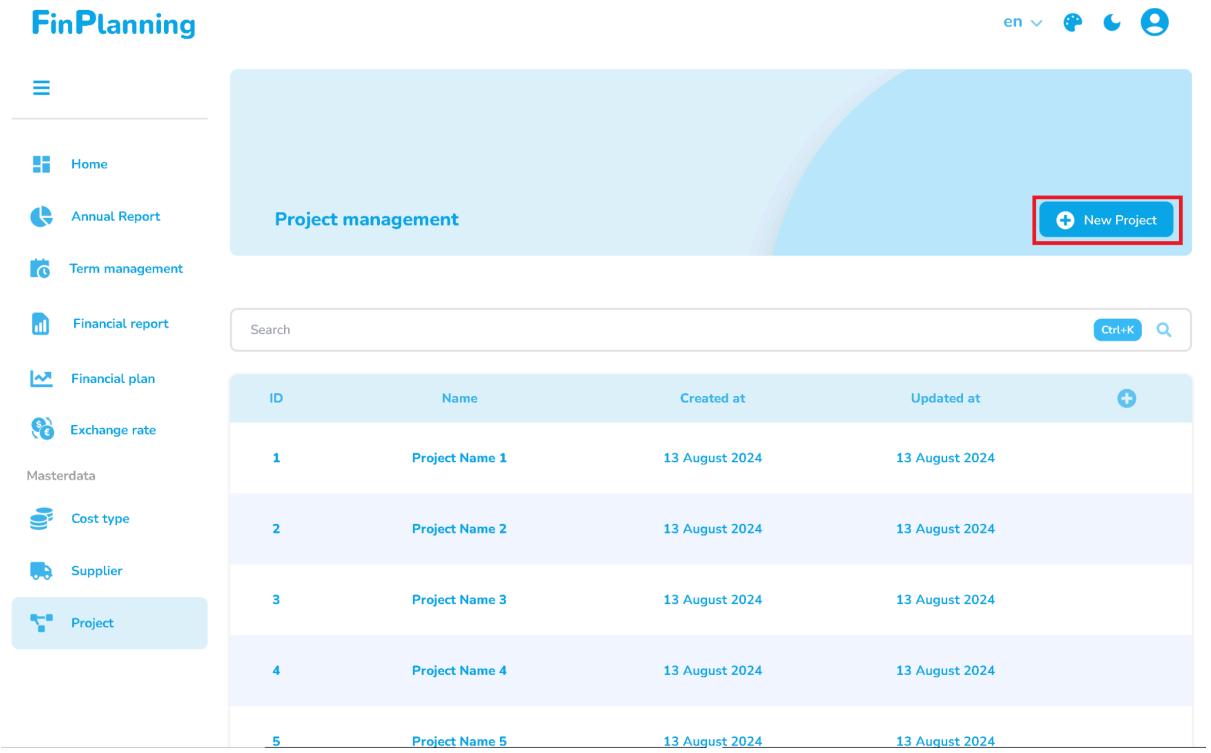
6.3.9.6 Create project (프로젝트 생성)

Role: Accountant

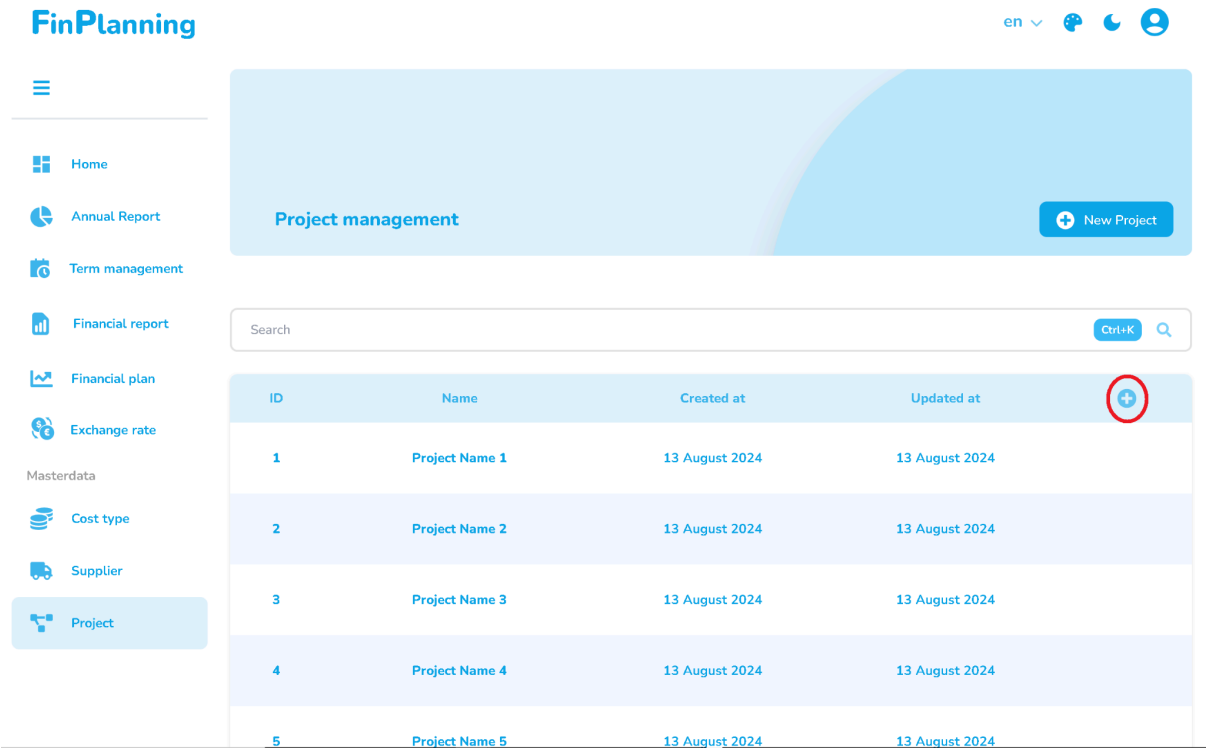
Step 1: Login as Accountant, after Home screen is displayed, click on “Project” on sidebar



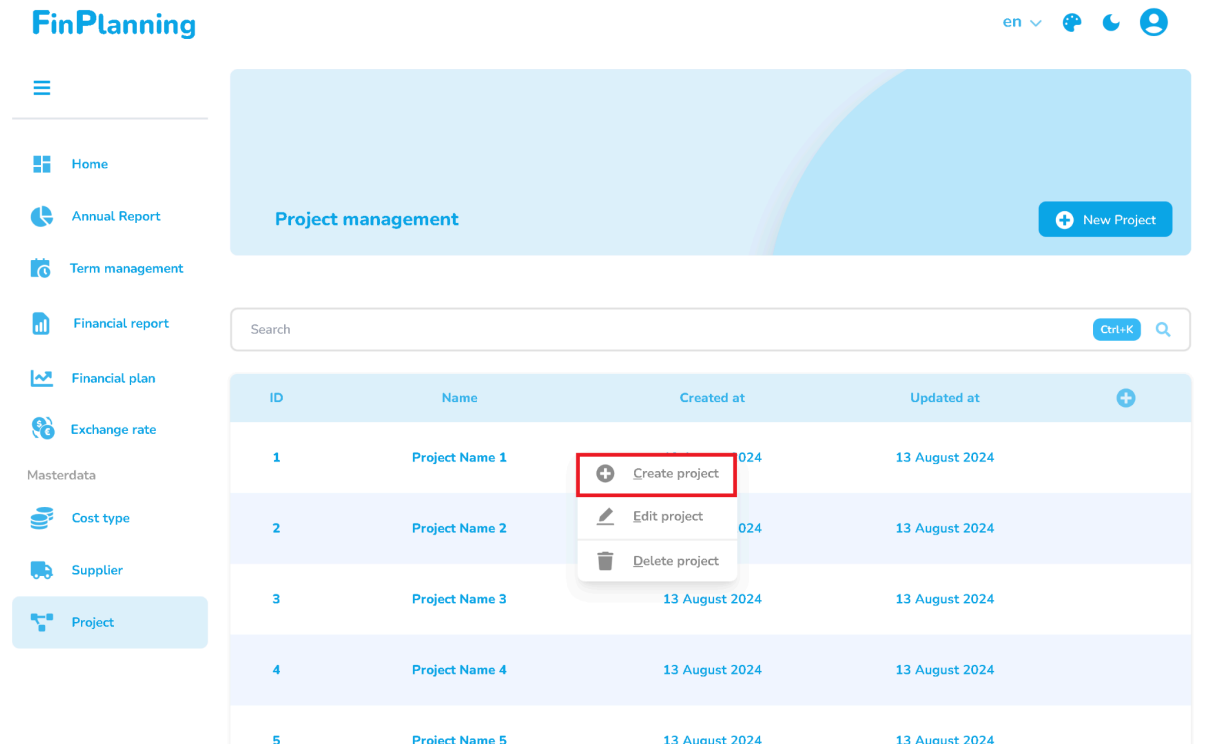
Step 2: Click on “New Project”



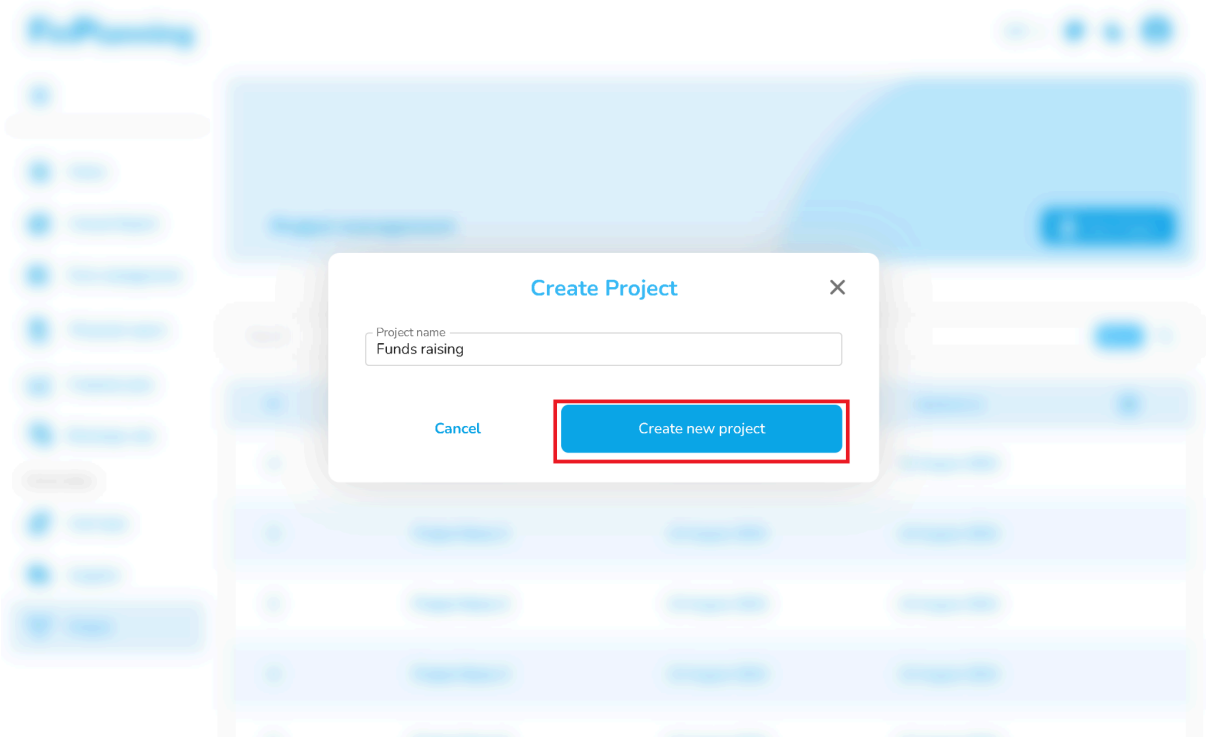
***Note:** User can also click on “+” icon



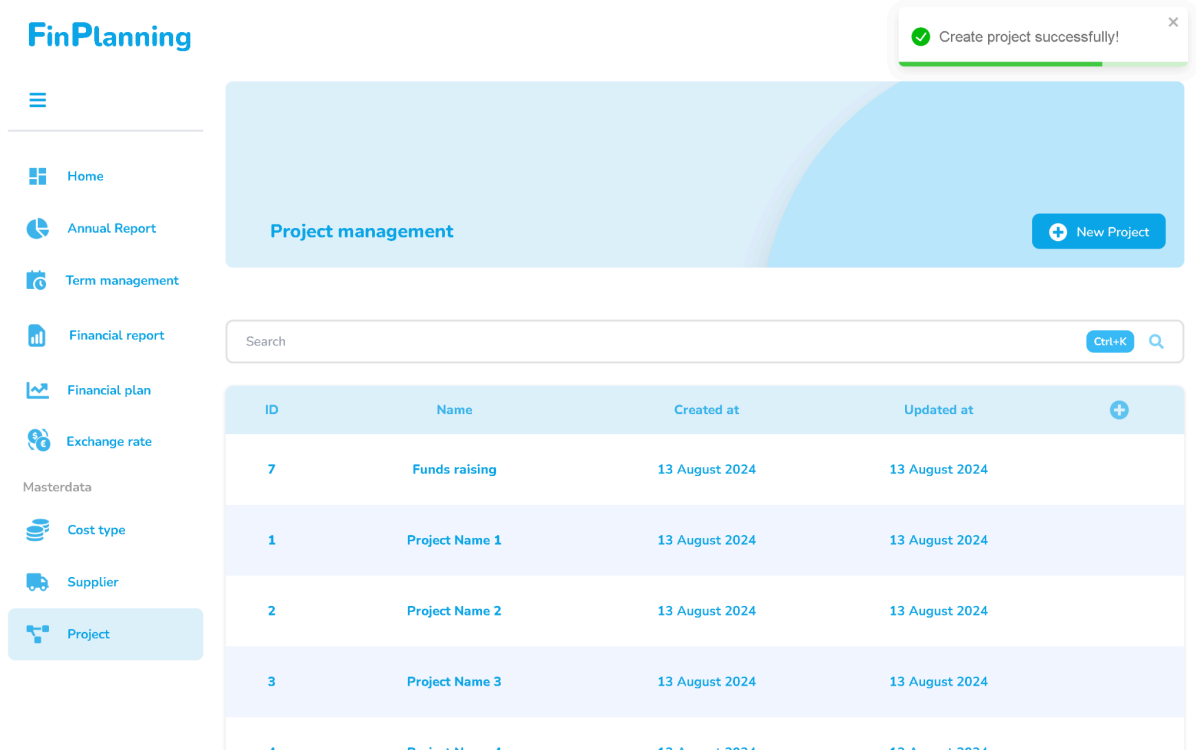
***Note:** User can right click on the project list, then click on “Create project” or press “C” from keyboard



Step 3: A pop-up window will be displayed, fill required field, then click on “Create new project”



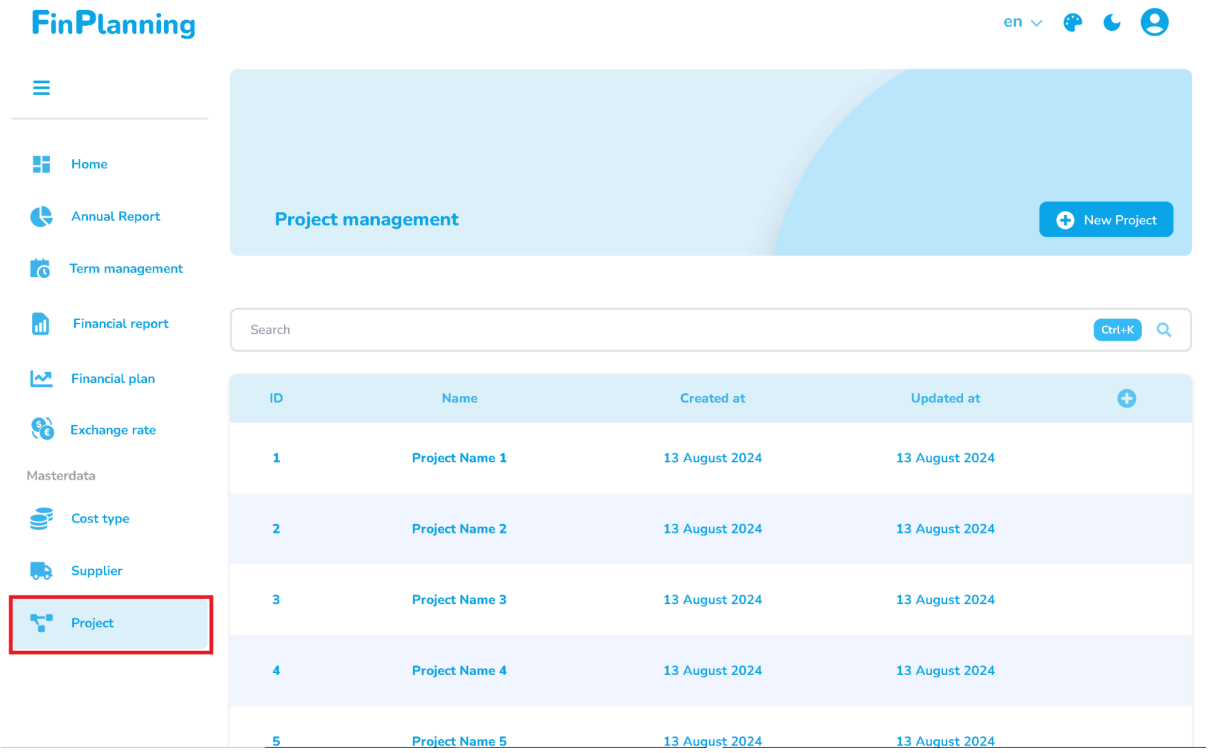
Step 4: A success message will be displayed and project list is updated



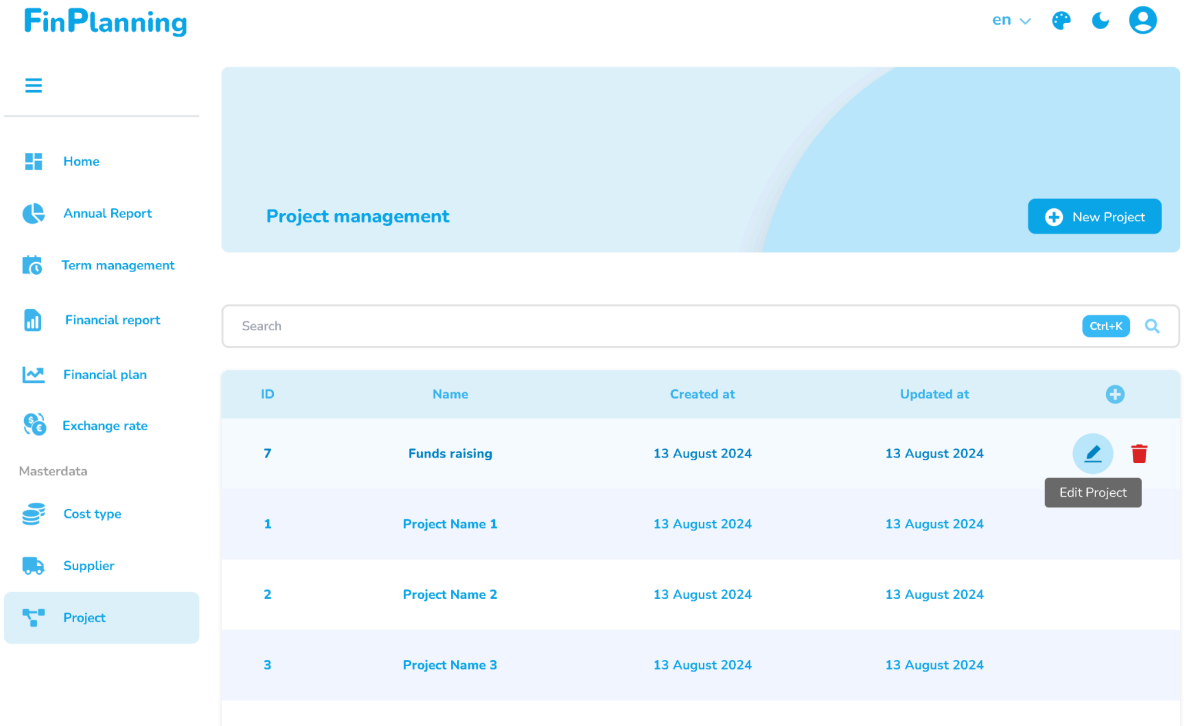
6.3.9.7 Edit project (프로젝트 편집)

Role: Accountant

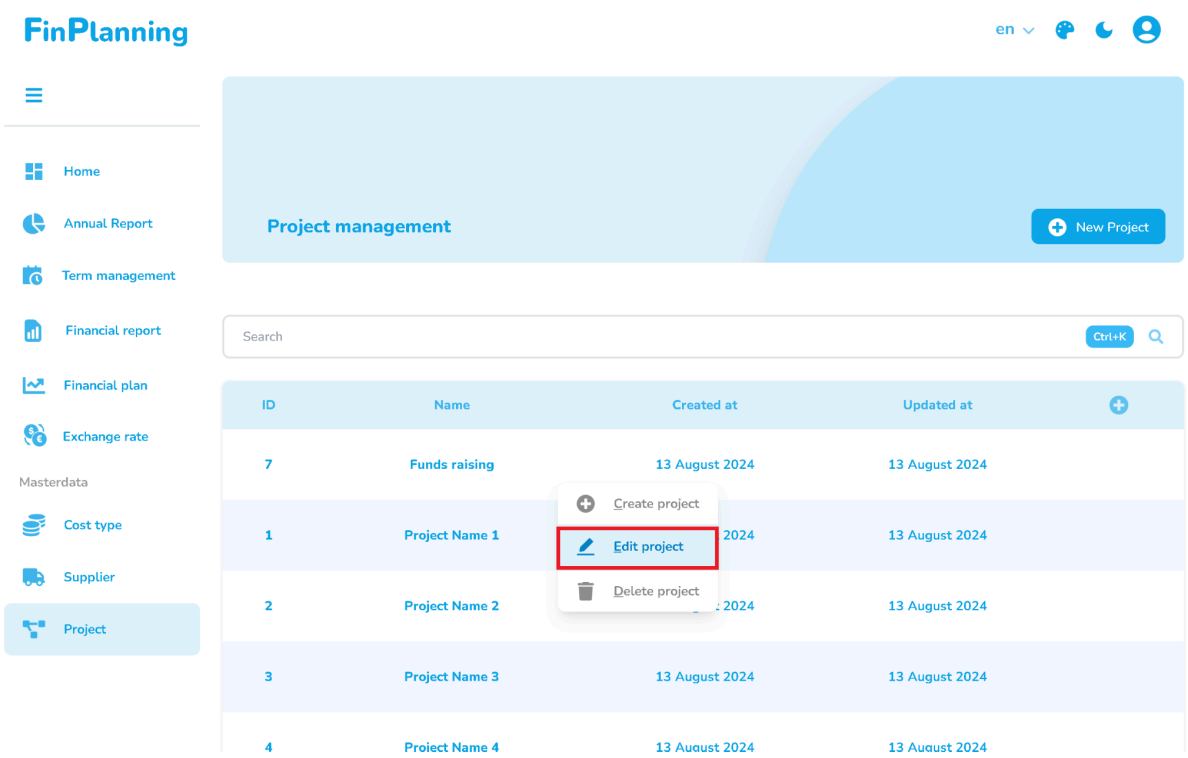
Step 1: Login as Accountant, after Home screen is displayed, click on “Project” on sidebar



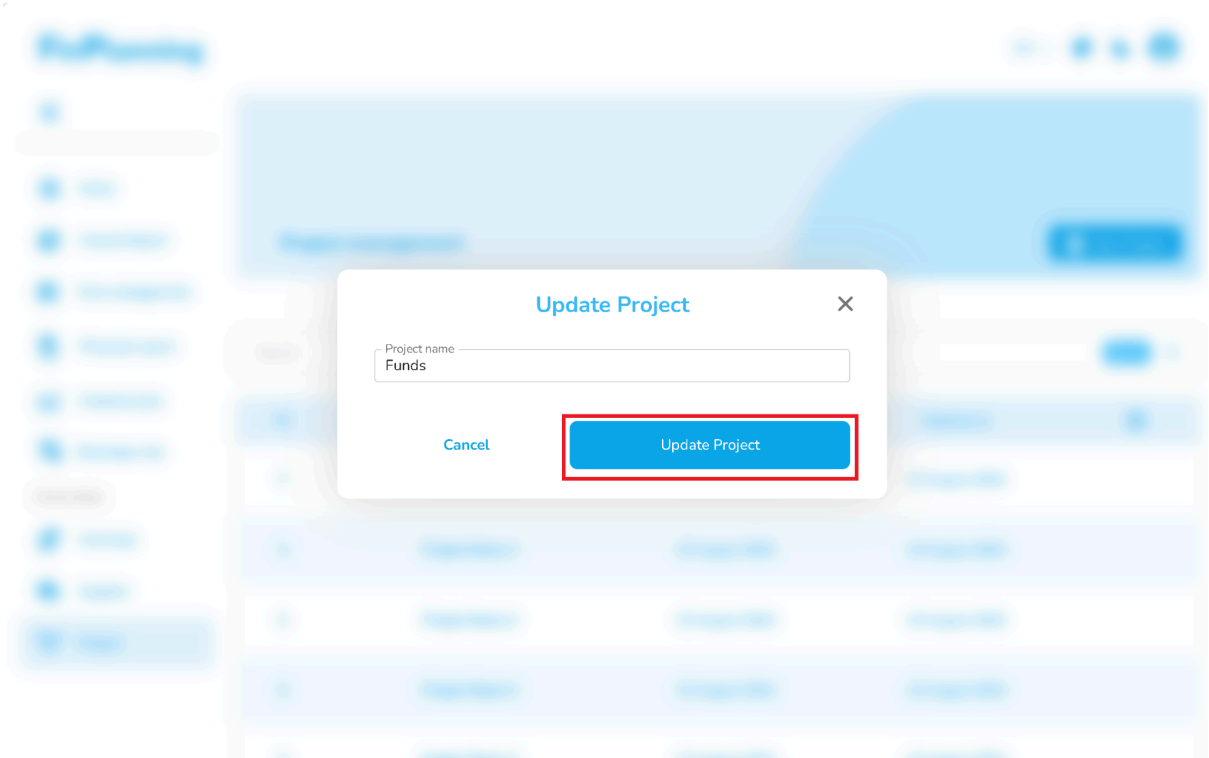
Step 2: Hover over the project row which user wants to edit, then click on “Edit” icon



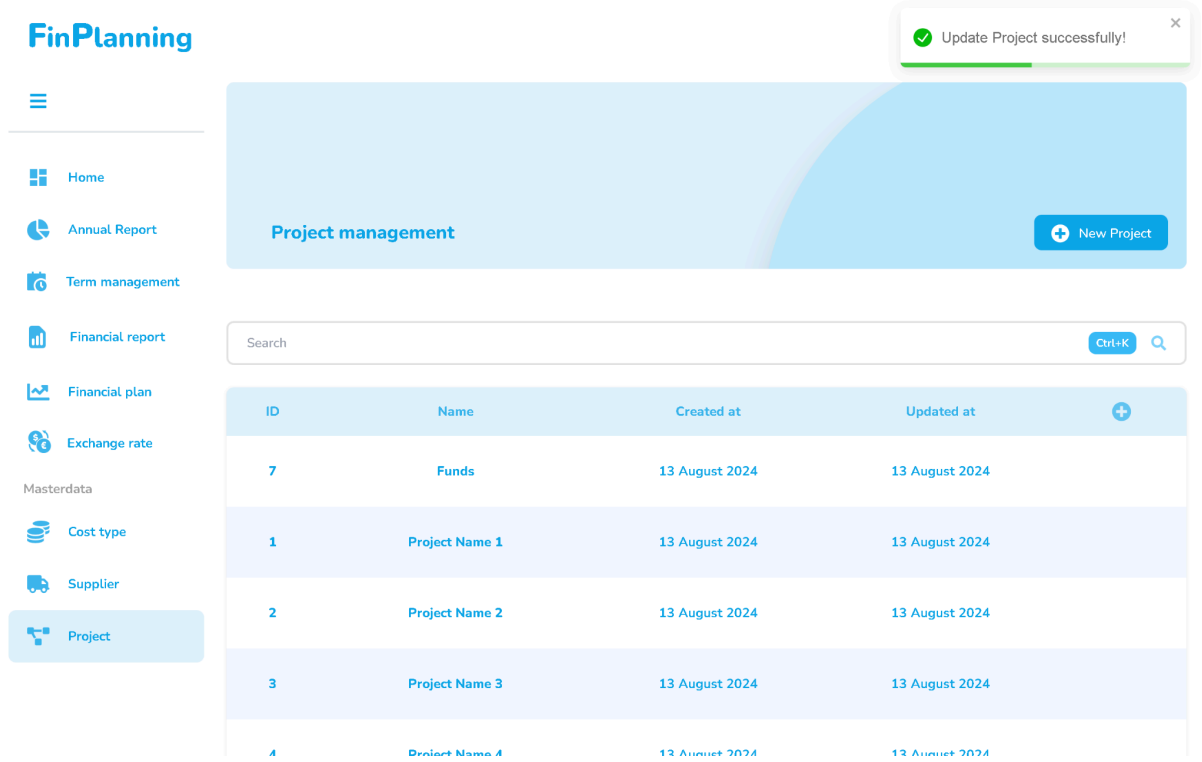
***Note:** User can also right click on the row then click on “Edit project” button or press “E” from keyboard



Step 3: After pop-up screen is displayed, fill the required field, then click on “Update Project”



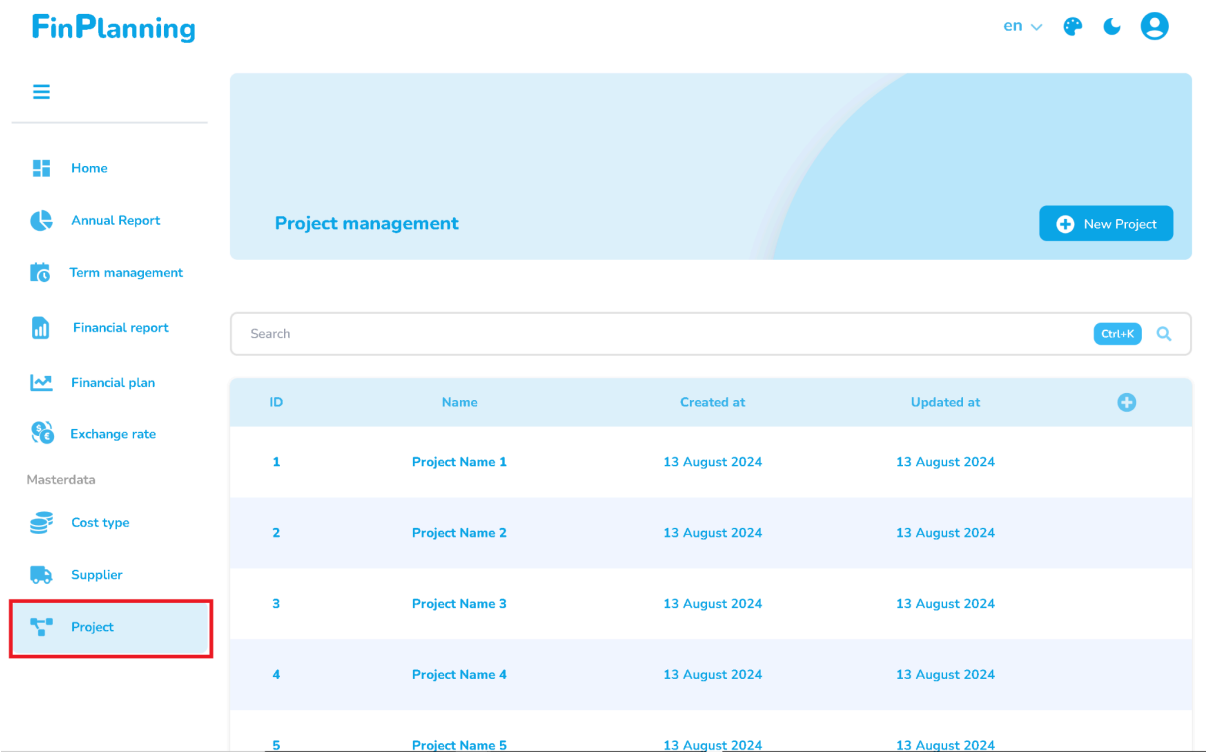
Step 4: A success message will be displayed, and project list is updated



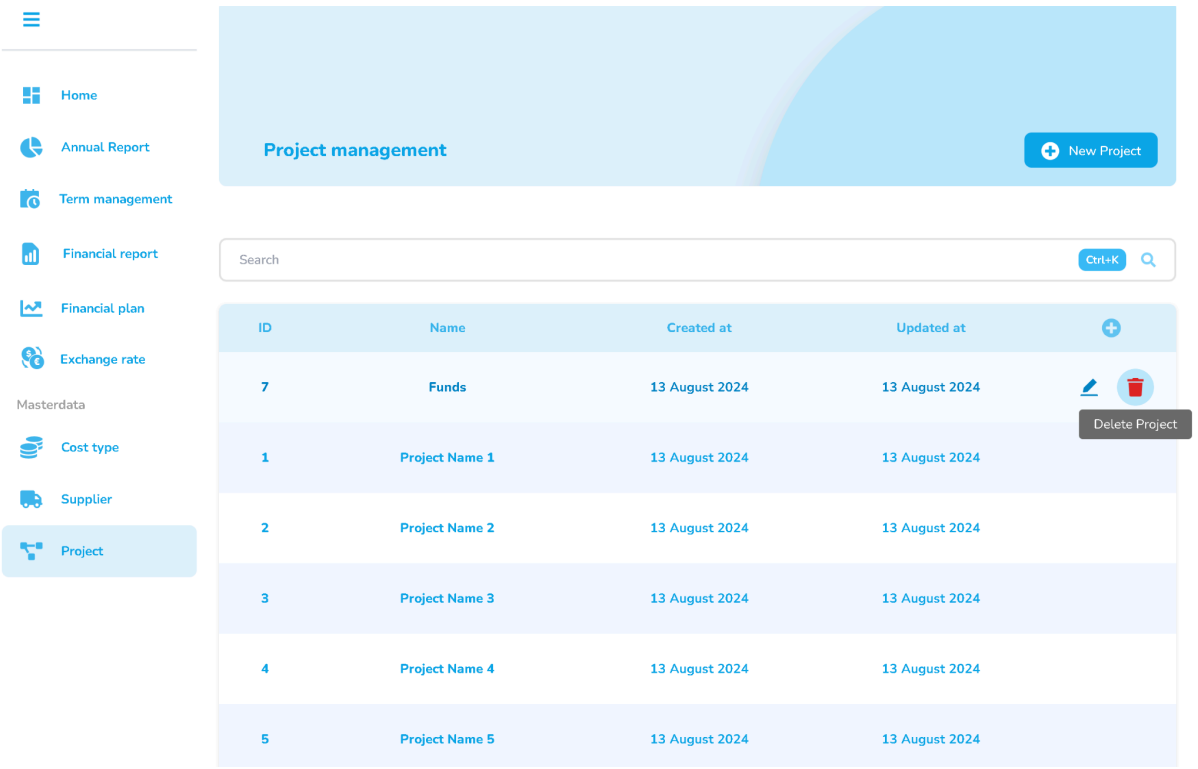
6.3.9.8 Delete project (프로젝트 삭제)

Role: Accountant

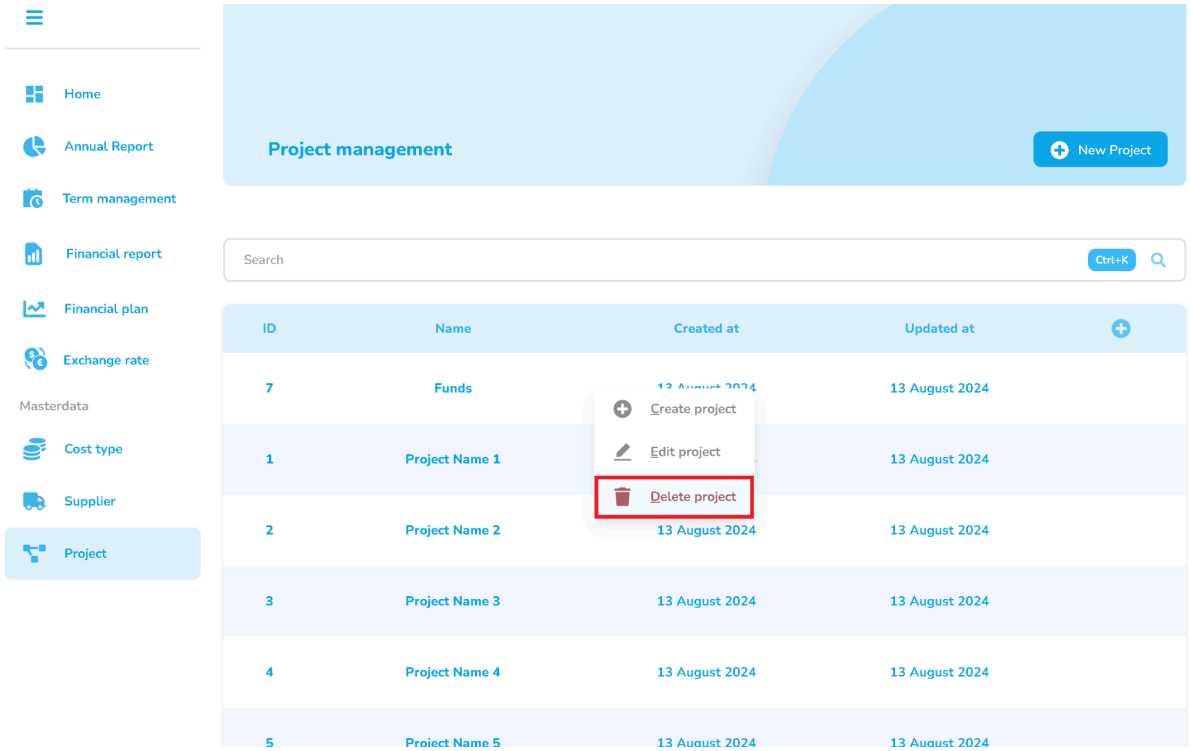
Step 1: Login as Accountant, after Home screen is displayed, click on “Project” on sidebar



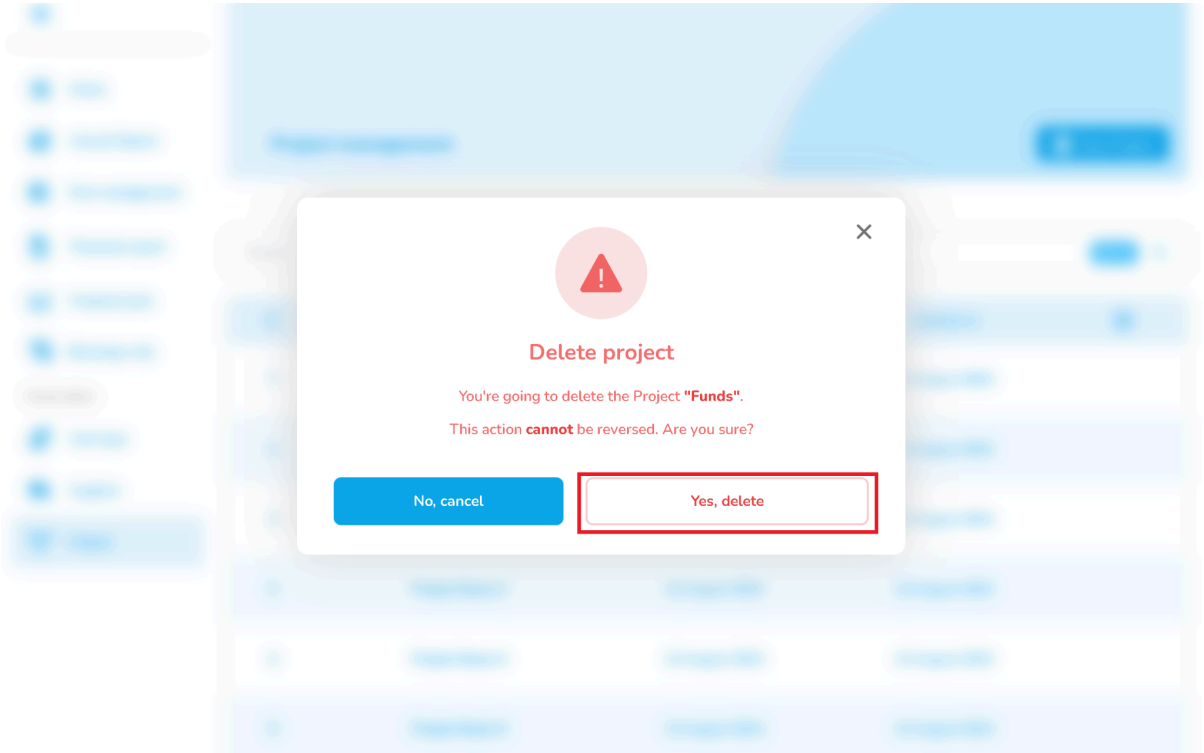
Step 2: Hover over the project row that user wants to delete, then click on “Delete” icon



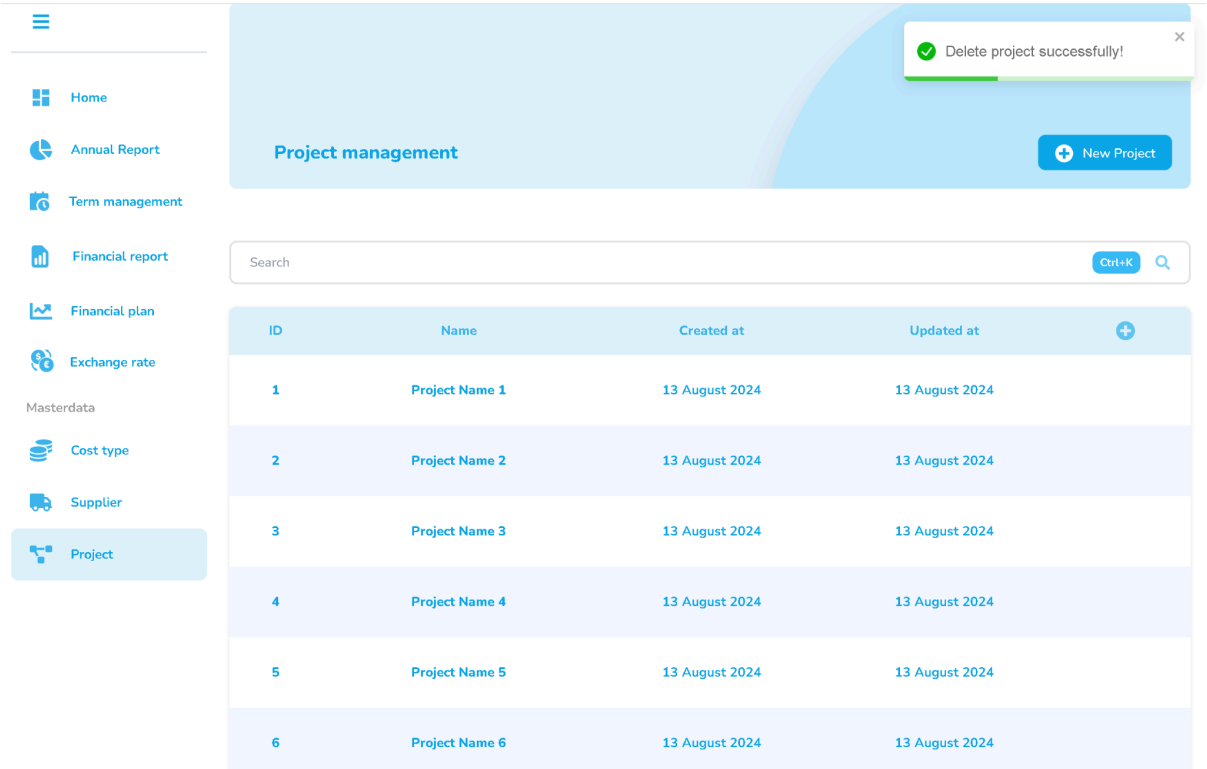
***Note:** User can also right click on the row that user wants to delete, then click on “Delete project”



Step 3: After confirmation pop-up is displayed, click on “Yes, delete”



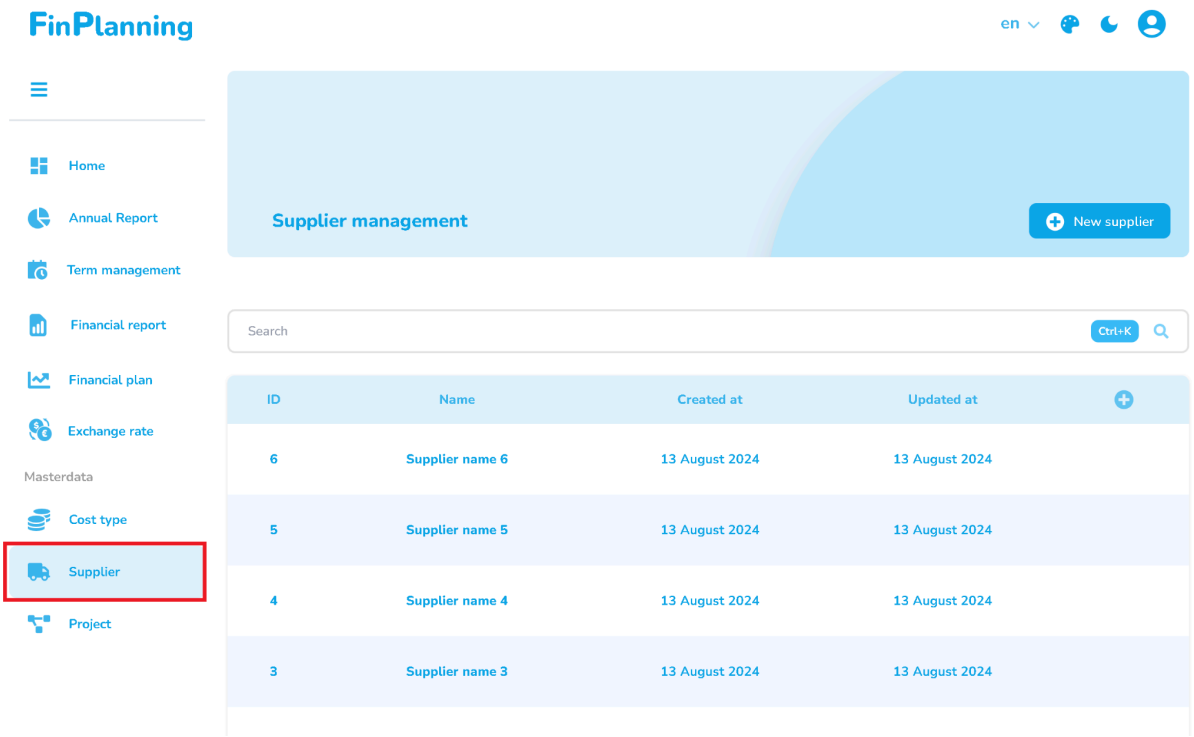
Step 4:A success message is displayed, and project list is updated



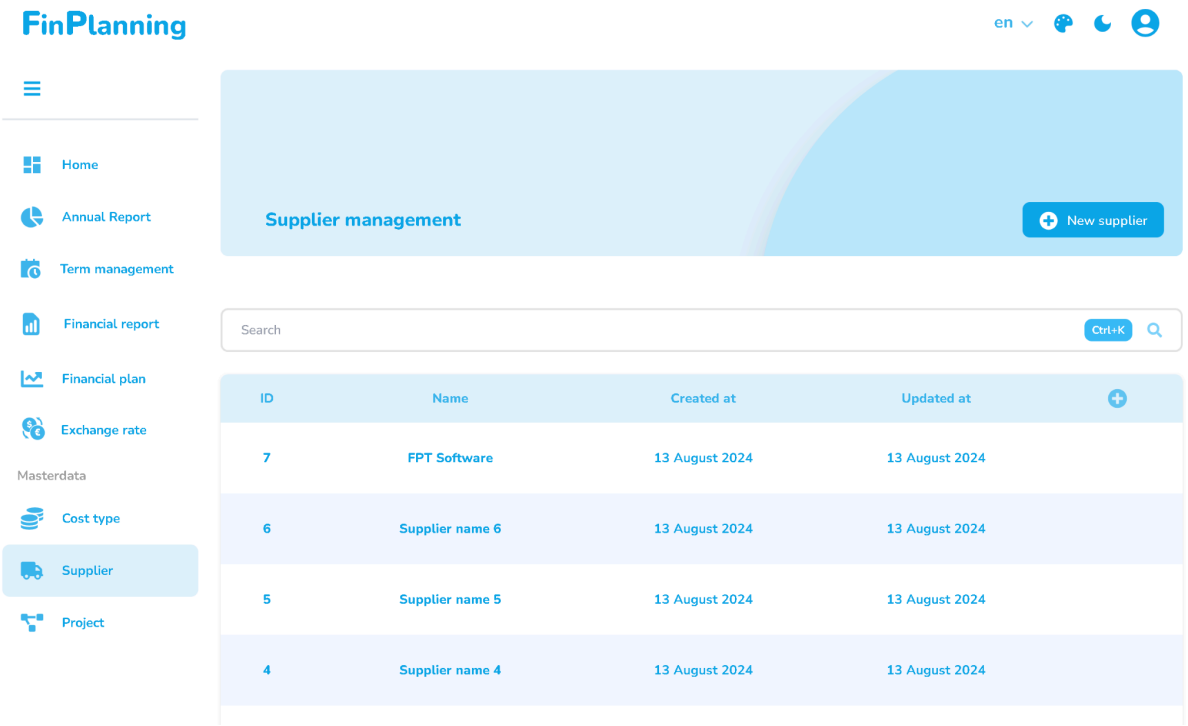
6.3.9.9 View supplier list (공급업체 목록 보기)

Role: Accountant

Step 1: Login using Accountant account, after Home screen is displayed, click on “Supplier” on sidebar



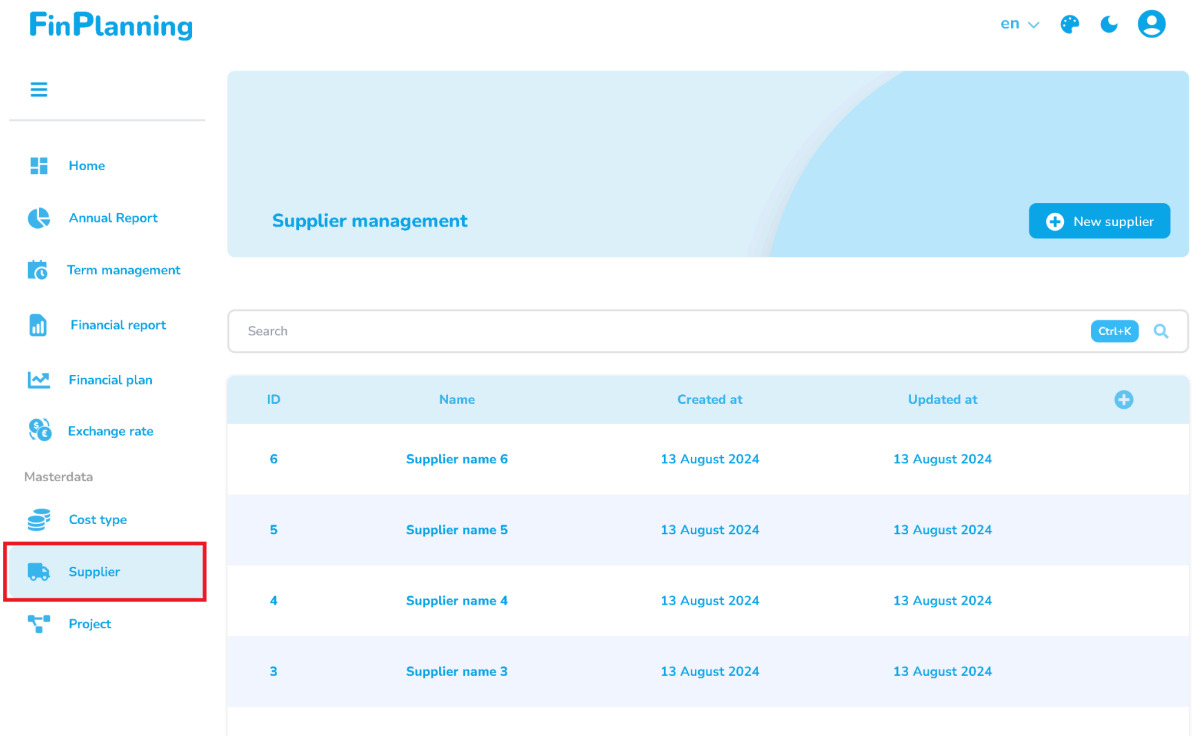
Step 2: Supplier list is displayed



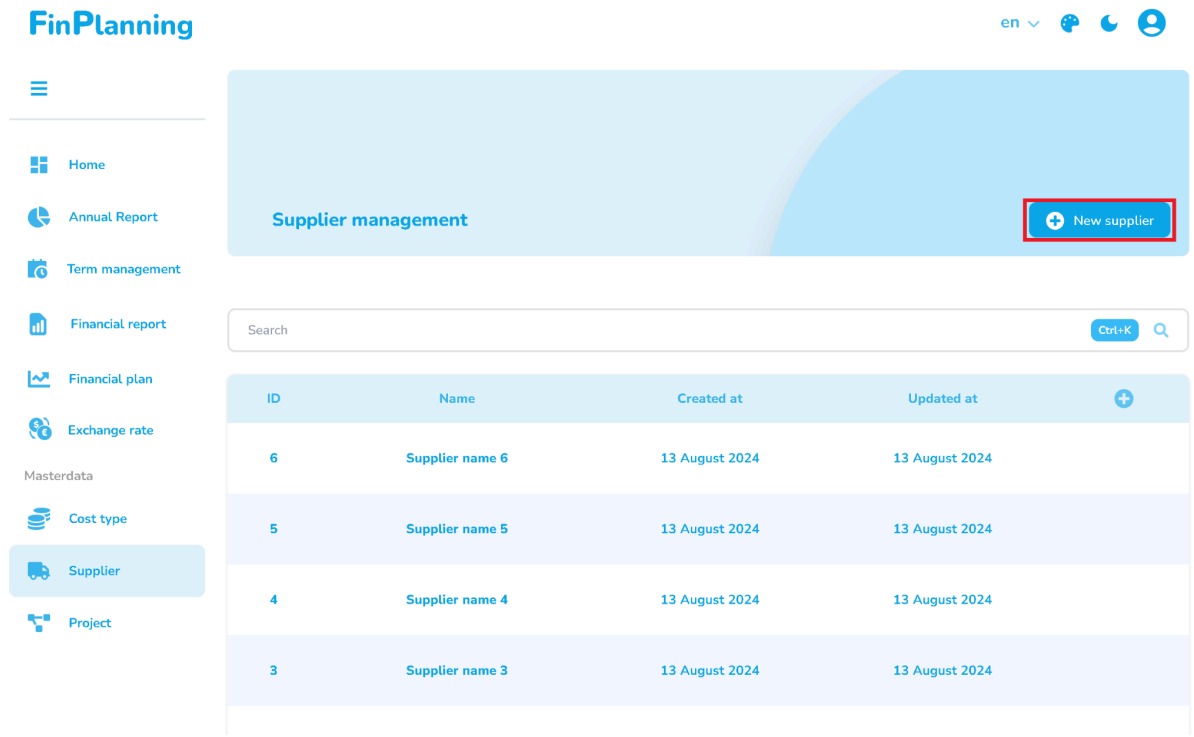
6.3.9.10 Create supplier (공급업체 생성)

Role: Accountant

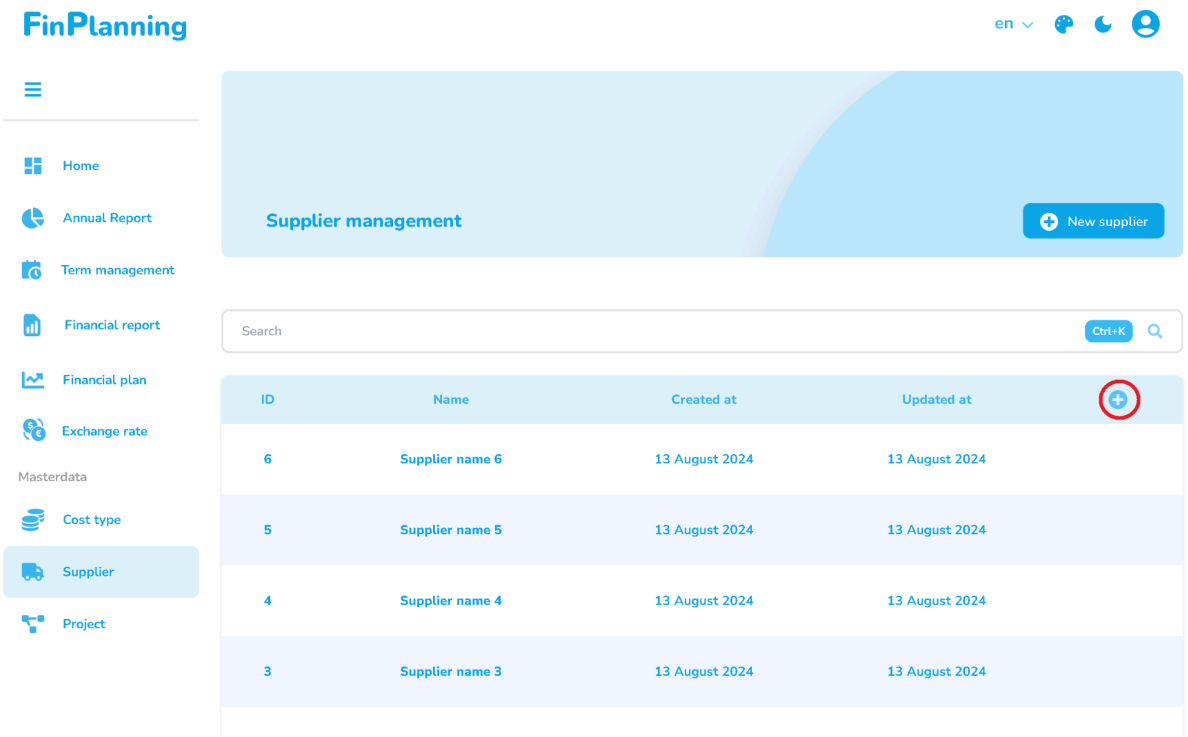
Step 1: Login using Accountant account, after Home screen is displayed, click on “Supplier” on sidebar



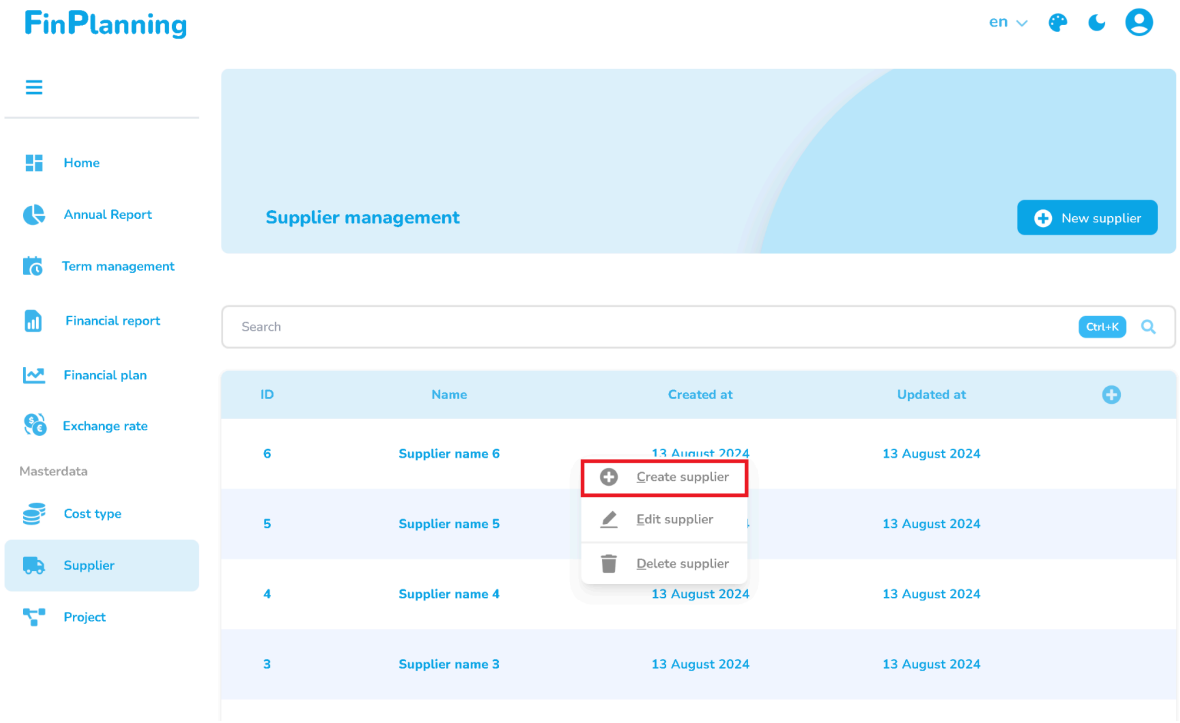
Step 2: Click on “New supplier”



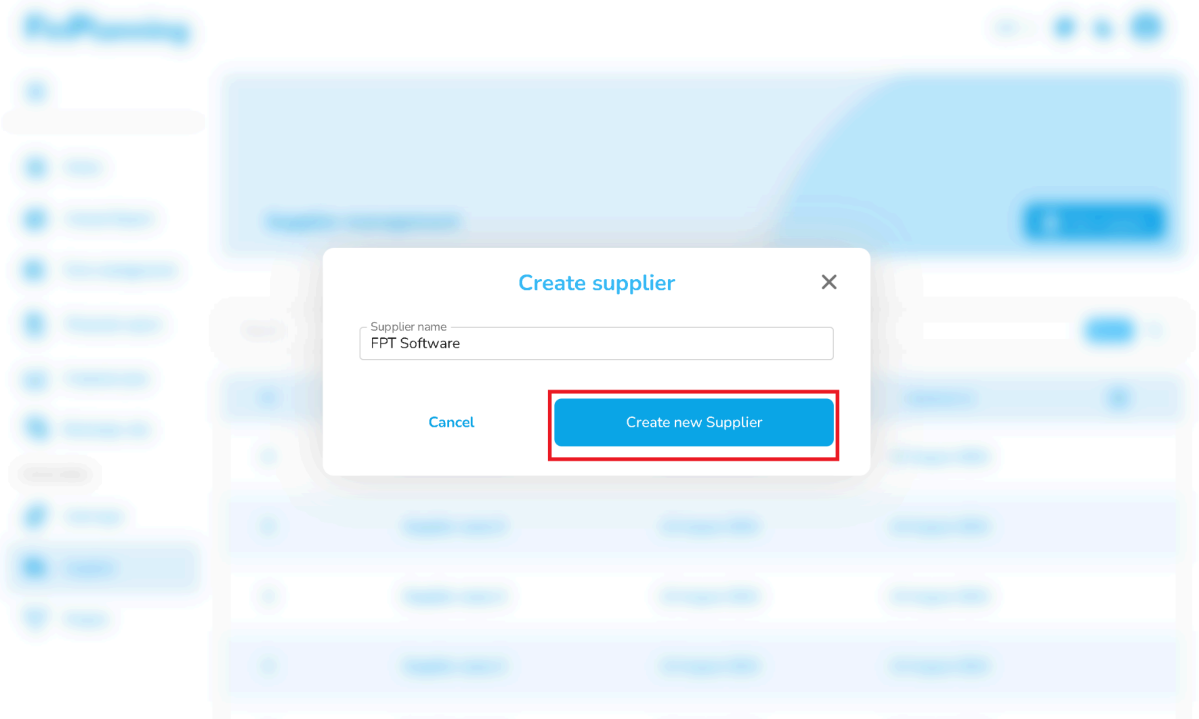
***Note:** User can also click on “+” icon



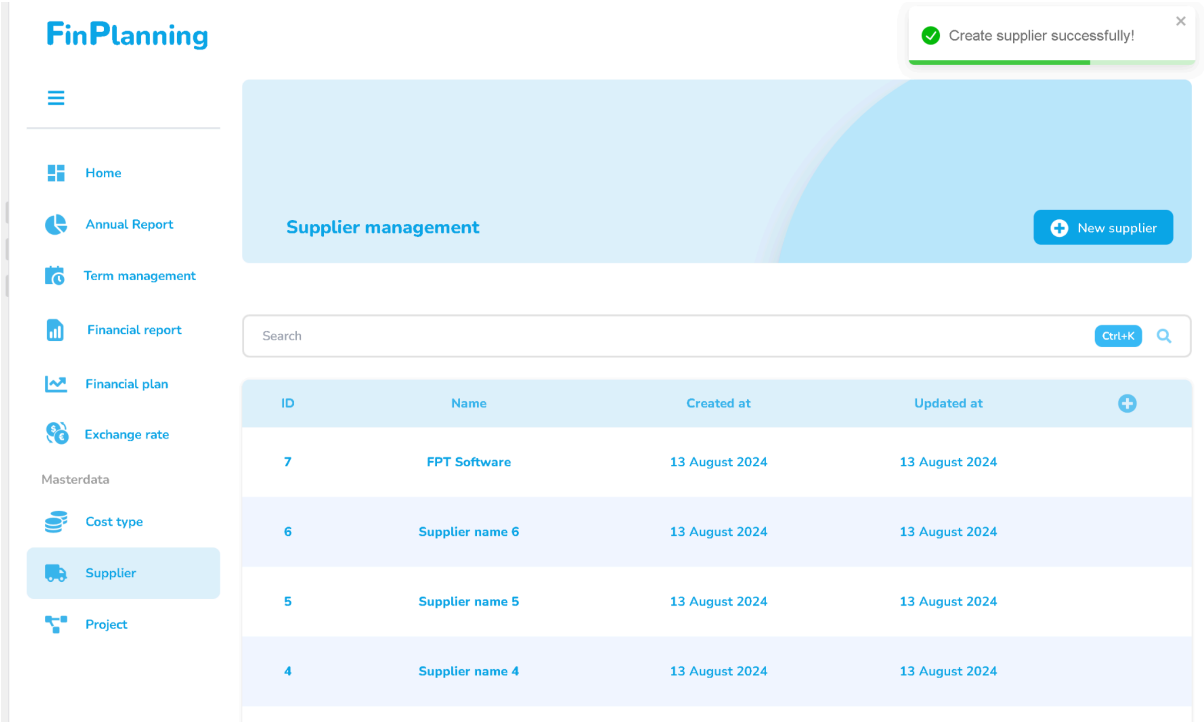
***Note:** User can also right click on the supplier list, then click on “Create supplier” or press “C” from keyboard



Step 3: After pop-up screen is displayed, fill the required field, then click on “Create new supplier”



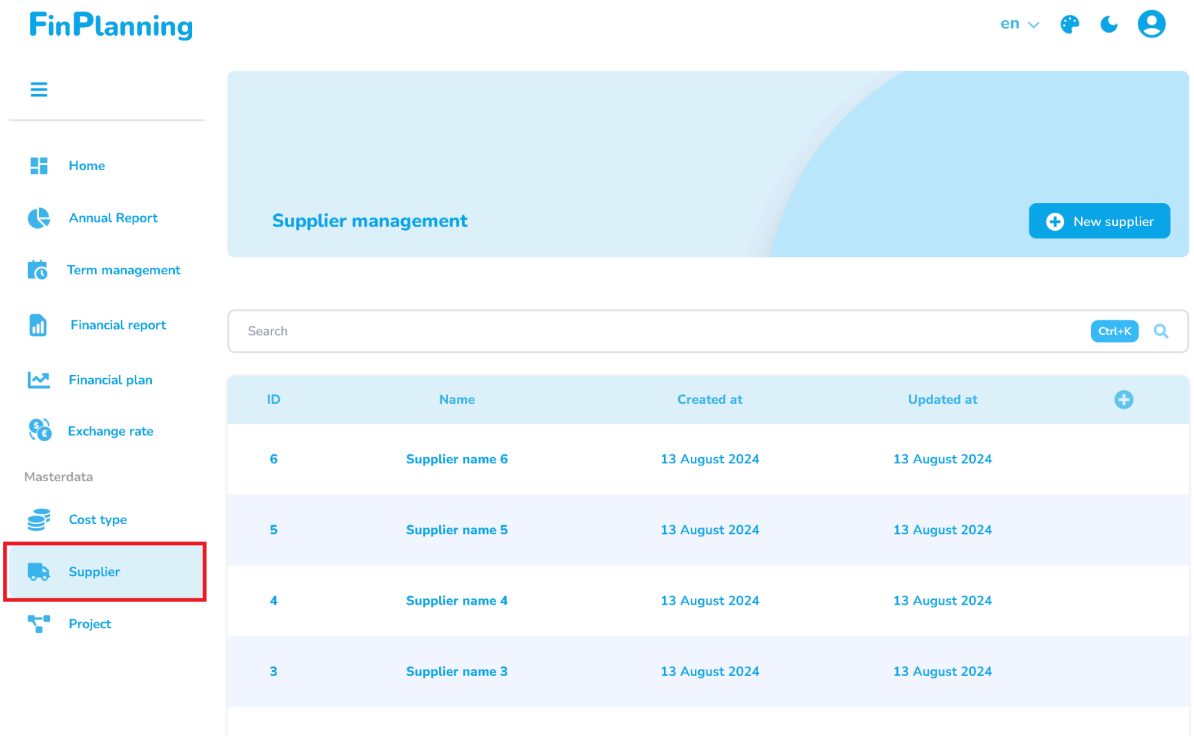
Step 4: A success message is displayed, and supplier list is updated



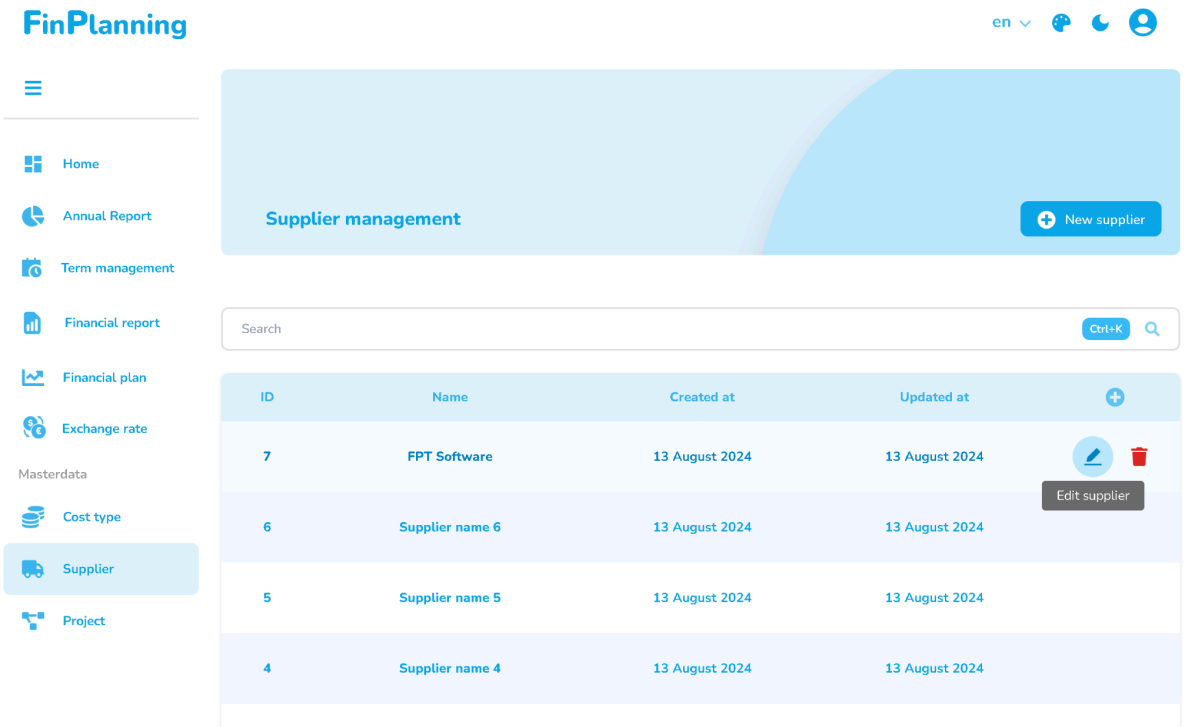
6.3.9.11 Edit supplier (공급업체 편집)

Role: Accountant

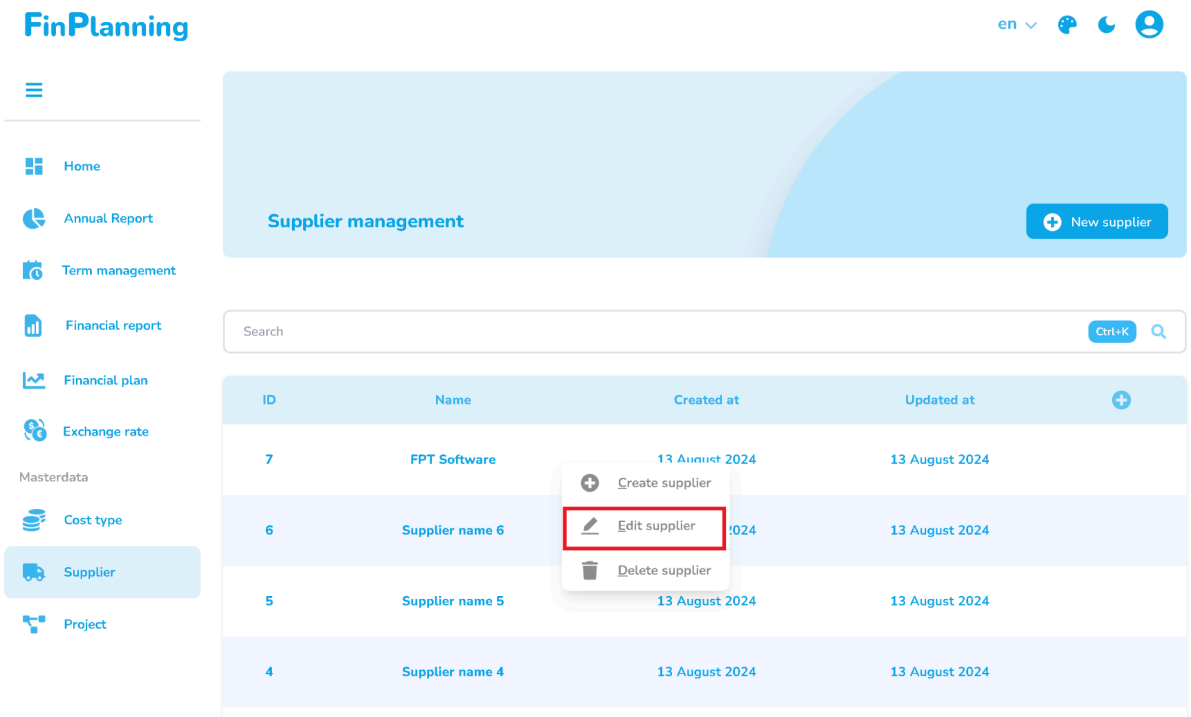
Step 1: Login using Accountant account, after Home screen is displayed, click on “Supplier” on sidebar



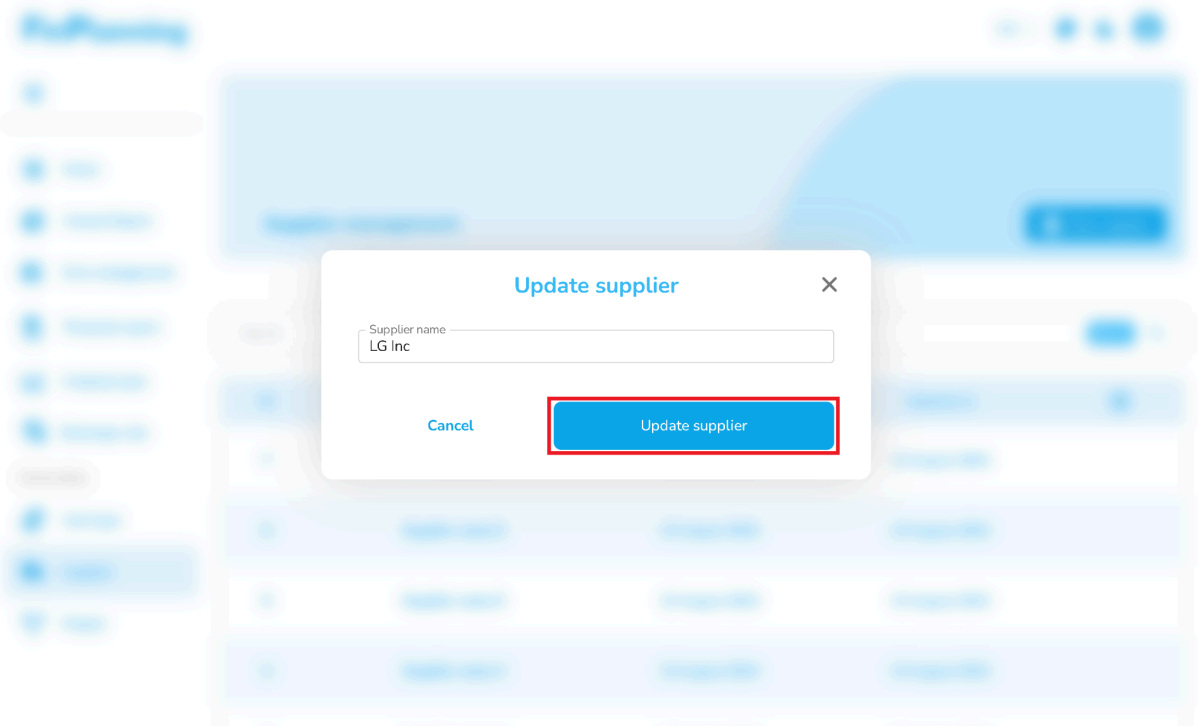
Step 2: Hover over the supplier row that user wants to edit, click on “Edit” icon



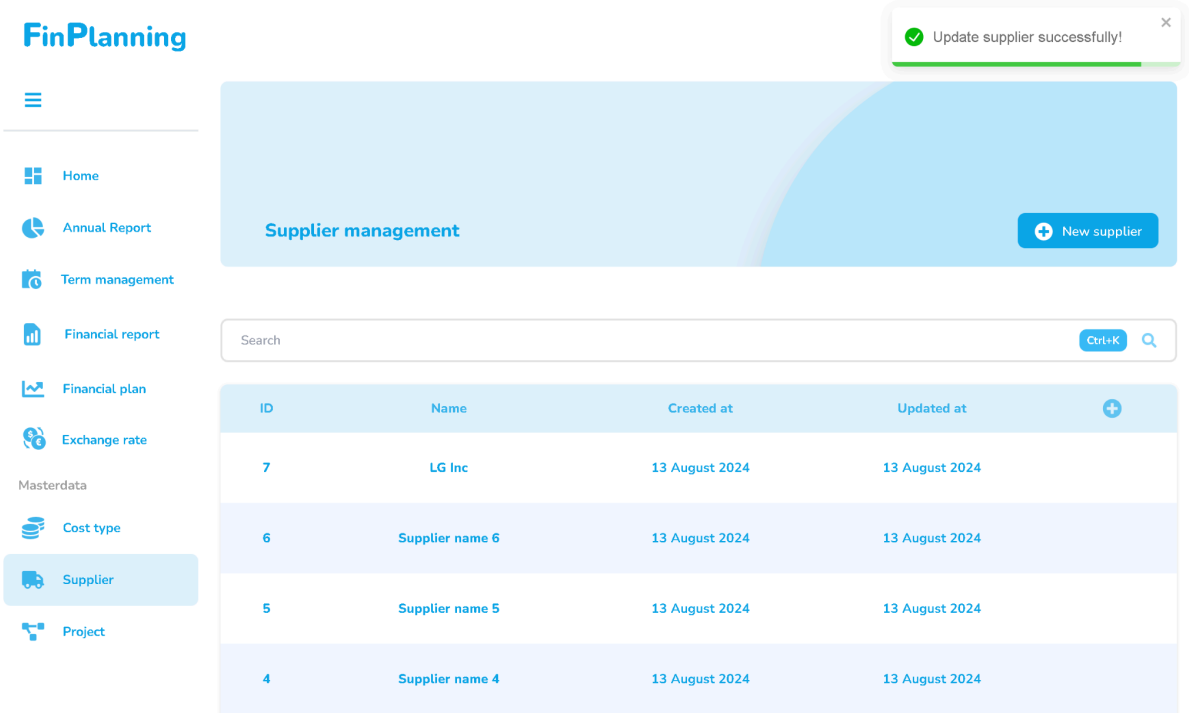
***Note:** User can also right click on that row, then click on “Edit supplier” or press “E” from keyboard



Step 3: A pop-up screen will appear, fill the required field, then click on “Update supplier”



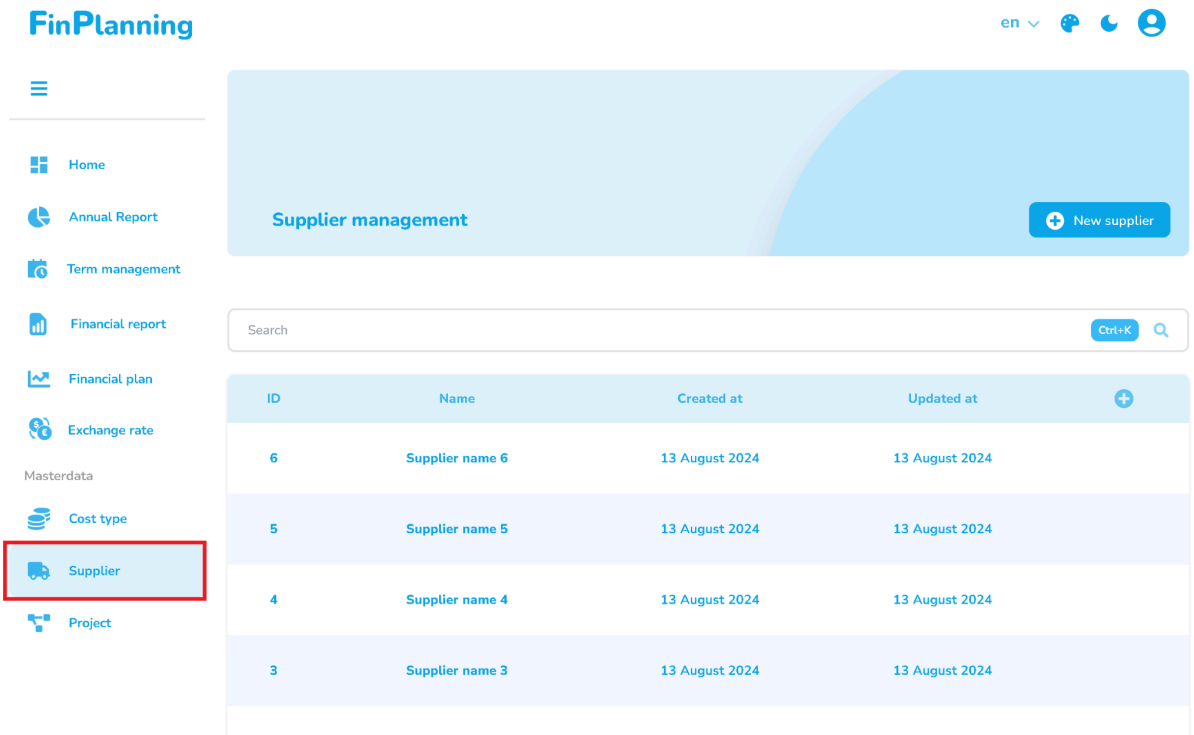
Step 4: A success message is displayed and supplier list is updated



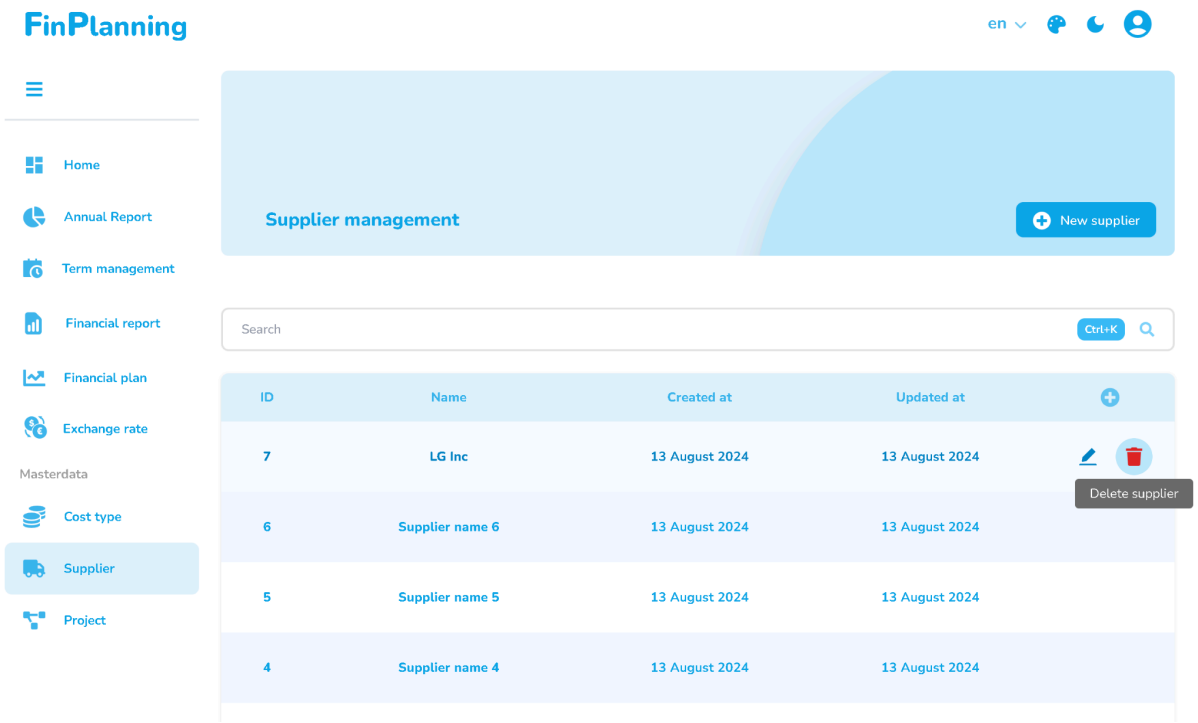
6.3.9.12 Delete supplier (공급업체 삭제)

Role: Accountant

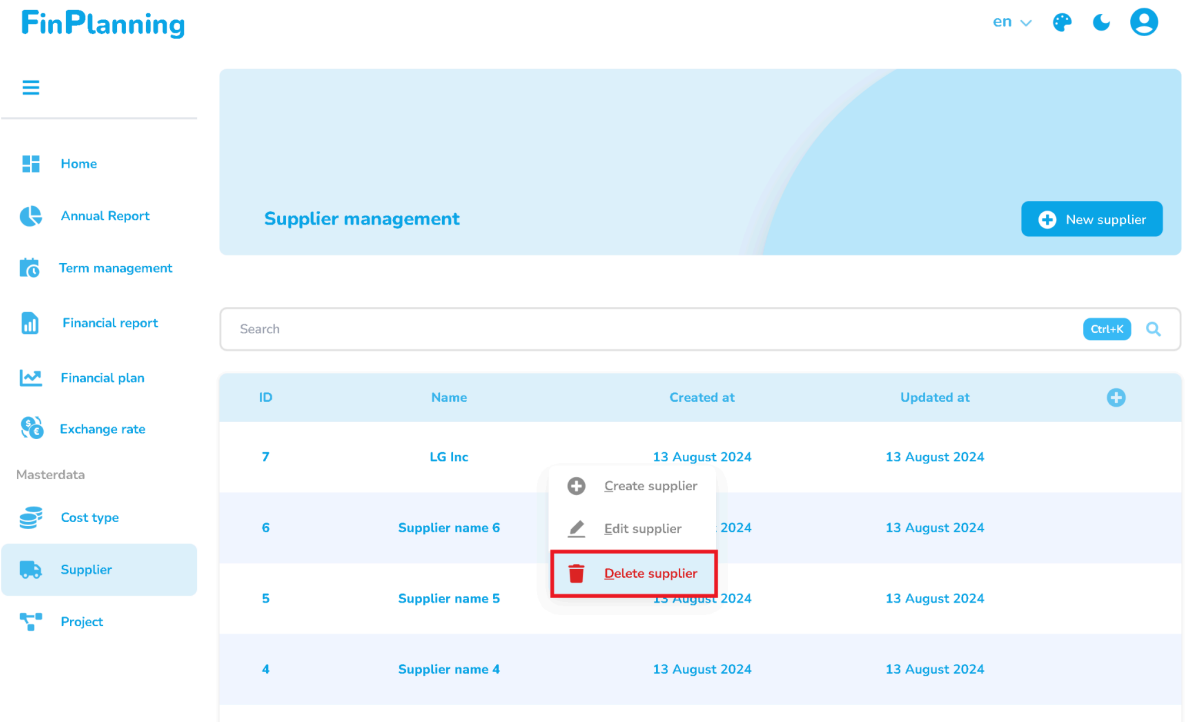
Step 1: Login using Accountant account, after Home screen is displayed, click on “Supplier” on sidebar



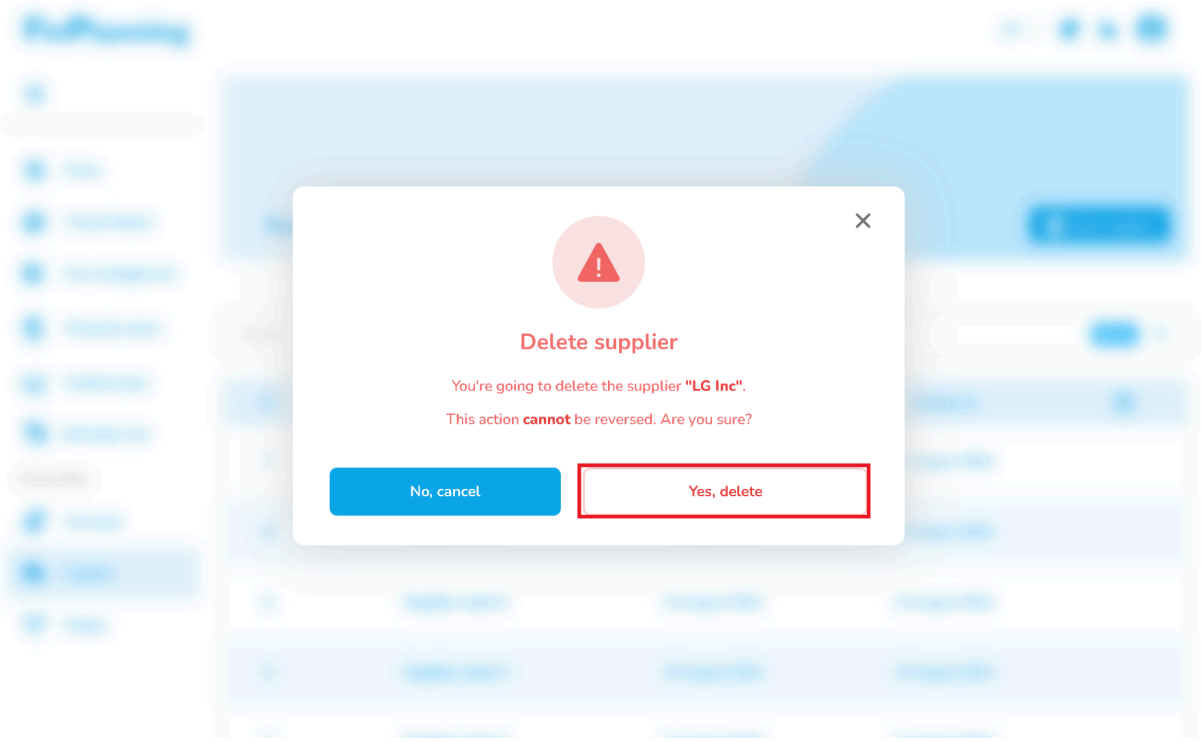
Step 2: Hover over the supplier row that user wants to delete, then click on “Delete” icon



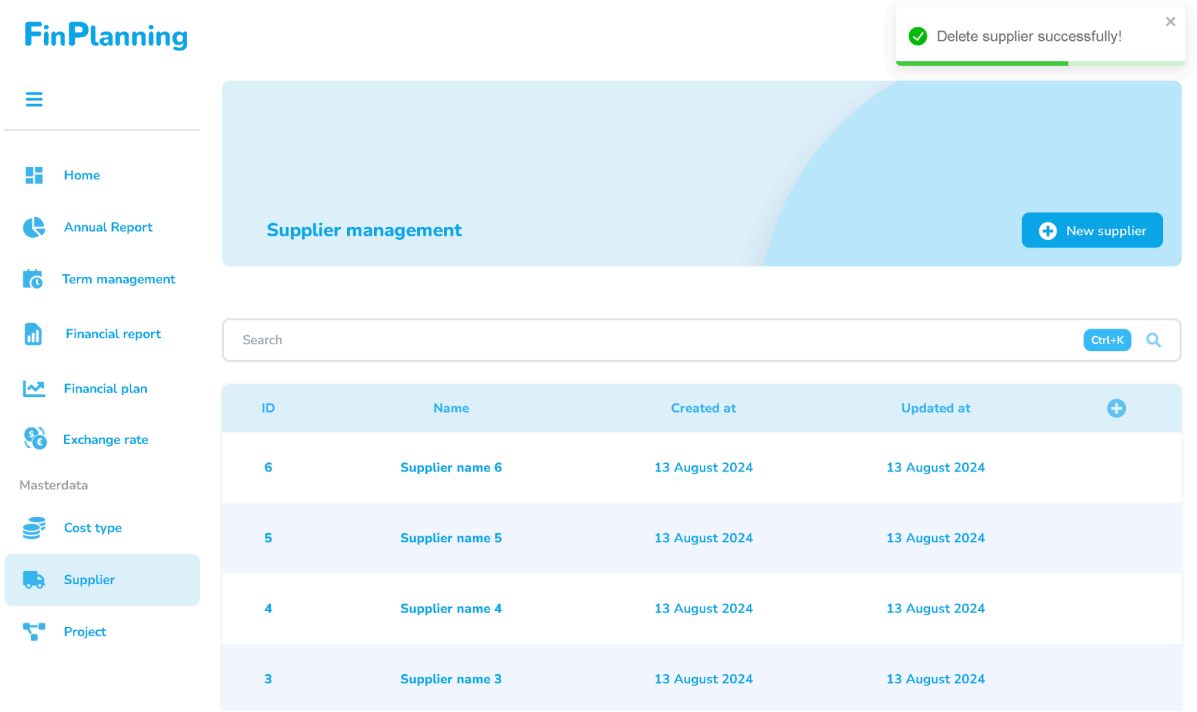
***Note:** User can also right click on that row, then click on “Delete supplier”



Step 3: After confirmation pop-up is displayed, click on “Yes, delete”



Step 4: A success message will be displayed, and supplier list is updated



6.3.9.13 View monthly exchange rate list (월간 환율 목록 보기**)**
6.3.9.14 Create monthly exchange rate (월간 환율 생성**)**
6.3.9.15 Edit monthly exchange rate (월간 환율 편집**)**
6.3.9.16 Delete monthly exchange rate (월간 환율 삭제**)**

6.3.9.17 View currency list (통화 목록 보기**)**
6.3.9.18 Create currency (통화 생성**)**
6.3.9.19 Edit currency (통화 편집**)**
6.3.9.20 Delete currency (통화 삭제**)**

6.3.10 Workflow Plan Management (계획 관리 워크플로우**)**
6.3.10.1 Import plan (계획 가져오기**)**
6.3.10.2 Download plan (계획 다운로드**)**
6.3.10.3 View plan list (계획 목록 보기**)**
6.3.10.4 View plan details (계획 세부 정보 보기**)**
6.3.10.5 Reupload plan (계획 다시 업로드**)**
6.3.10.6 Delete plan (계획 삭제**)**