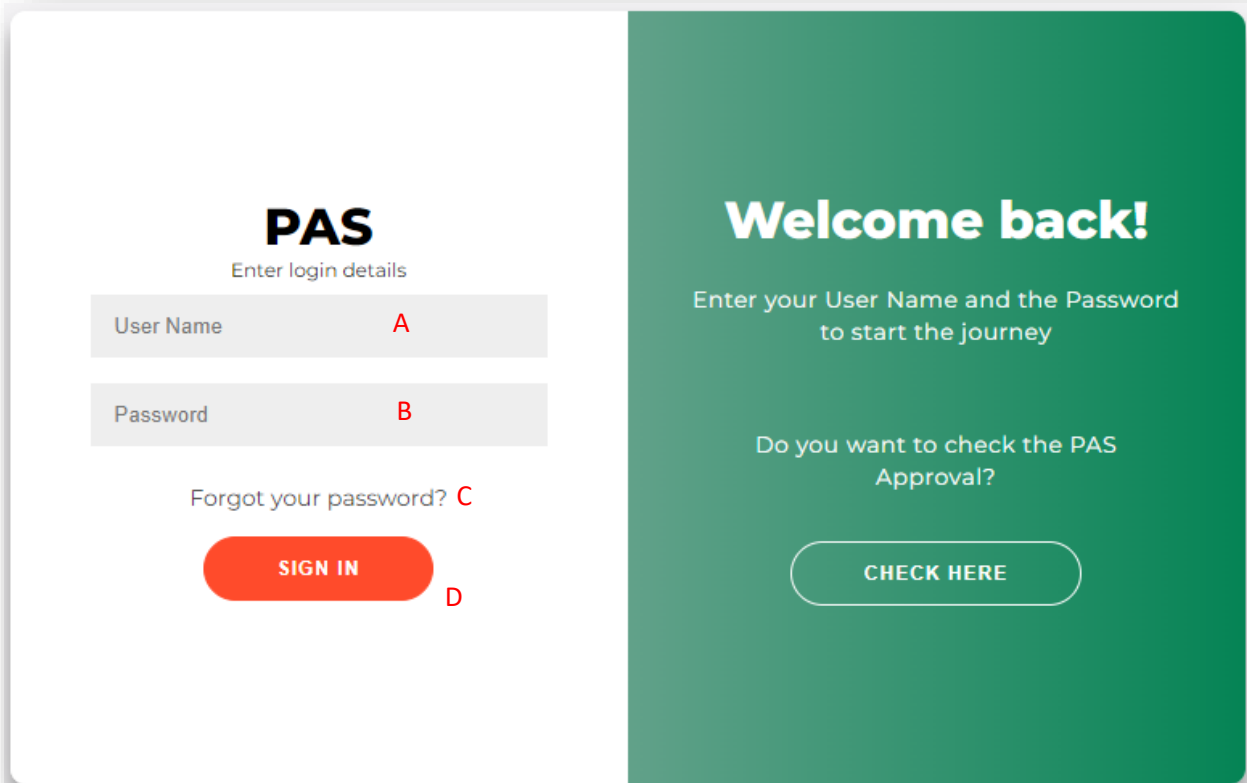


## PAS 2.0 User Guide

With the PAS 2.0 update, we have introduced several enhancements to improve the user experience for PAS users. These improvements include changes to the user interfaces and adjustments to the process of creating requests. Our goal with these updates is to provide a more user-friendly experience with minimal slowness, ensuring that users can navigate and utilize the system more efficiently.

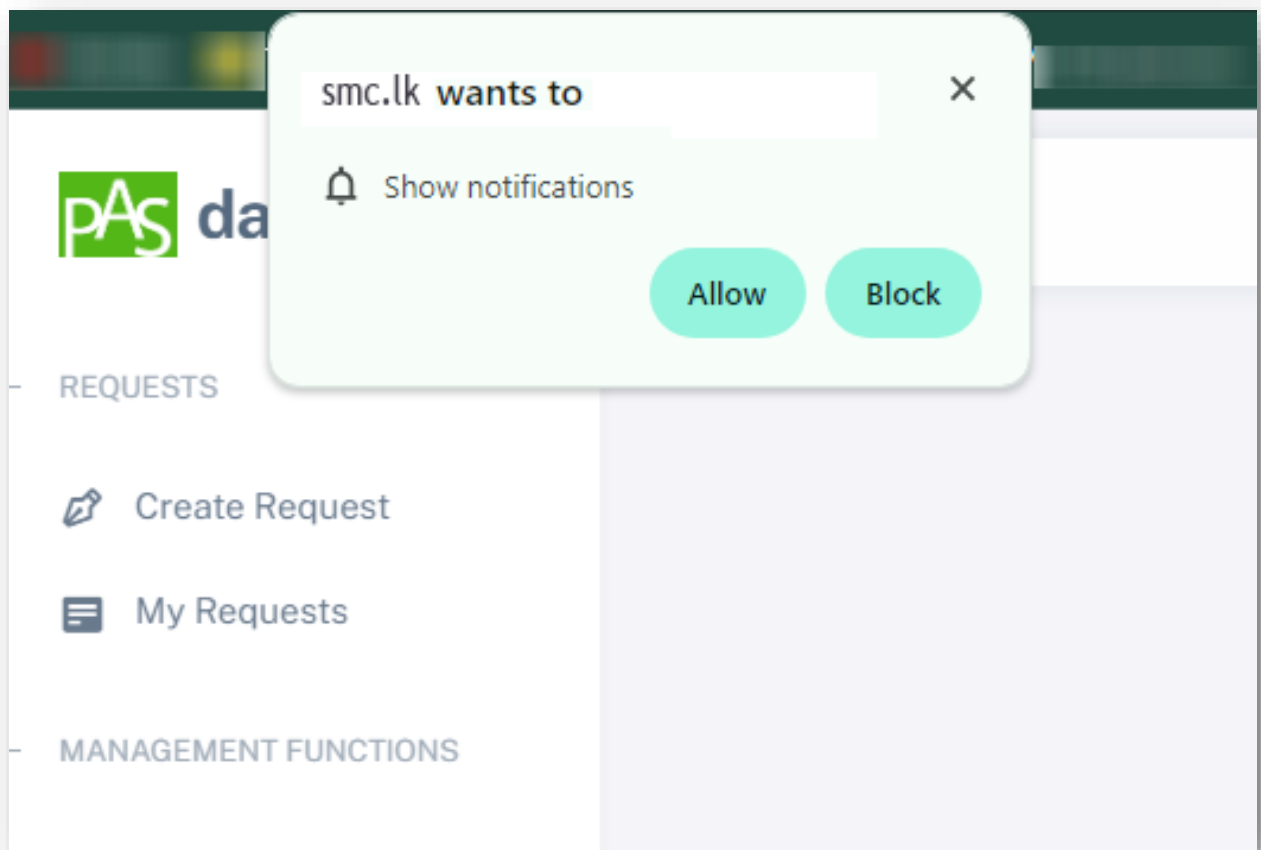
### Key Improvements in PAS 2.0

The image shows a login interface for PAS 2.0. It is split into two main sections. The left section is white and contains the 'PAS' logo at the top, followed by the text 'Enter login details'. Below this are two input fields: 'User Name' and 'Password'. The 'User Name' field is labeled with a red 'A' and the 'Password' field with a red 'B'. Below the password field is a link that says 'Forgot your password?' with a red 'C' next to it. At the bottom of the white section is a red button labeled 'SIGN IN' with a red 'D' next to it. The right section is a solid green background. It features the text 'Welcome back!' in large white letters. Below this, it says 'Enter your User Name and the Password to start the journey'. Further down, it asks 'Do you want to check the PAS Approval?' and includes a white button labeled 'CHECK HERE'.

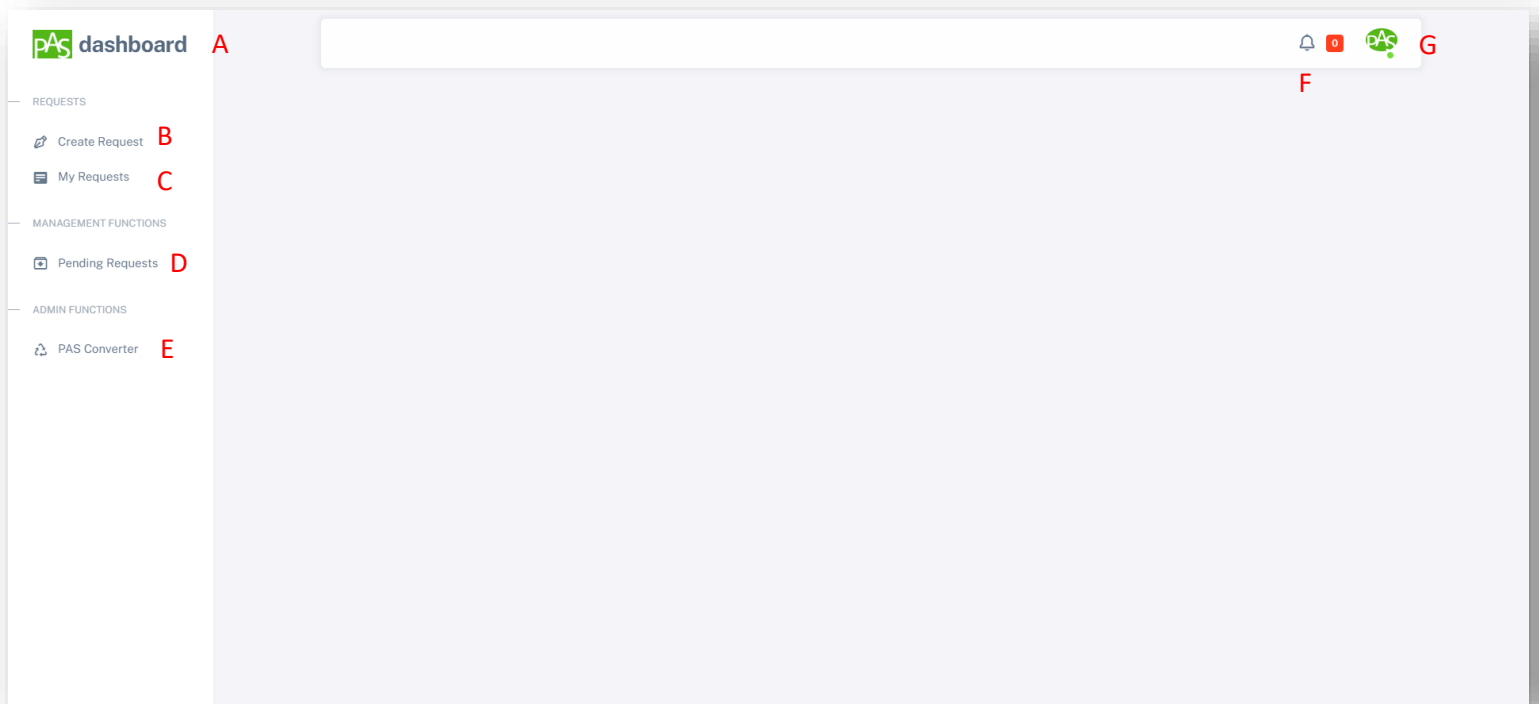
- A. Enter your PAS user name here.
- B. Enter your PAS password here.
- C. If you're not remember your password, click here and follow the process to reset your PAS password
- D. After entering User name and Password click here to sign in to the system.

## Web Notifications

When you log in to PAS for the first time on a device, you will see a message asking you to allow notifications. Enabling this will ensure you receive notifications about PAS updates even when you are away from the PAS web browser tab. For example, if one of your requests is approved or you have a pending request for approval, notifications will appear in your device's notification area.



## PAS Home Page



- A. By clicking here, you can go to the PAS Dashboard
- B. If you want to Create a PAS request you can go to the Create Request option.
- C. The follow back of your PAS requests, you can view by clicking the My Request.
- D. Depending on your User Level, you can view your Pending Request by clicking there.
- E. We have introduced new option for compressing your PDF or Image files – PAS Converter.
- F. You will receive a notification related the PAS request by here.
- G. If you want to change your PAS password, you can go to the PAS profile by clicking here.

## PAS Dashboard



Dashboard provides an enhanced view of various request details, catering to different levels of management with varying degrees of access. Here's a comprehensive overview of what each component entails:

### 1. Total Requests Created

This section provides a comprehensive view of all the requests created within the system. It includes:

- **Count of Requests:** The total number of requests created within a specified timeframe.
- **Categorization:** Breakdown by request type.

### 2. Pending Requests

This section focuses on requests that are yet to be approved. Key features include:

- **Count of Requests:** The total number of requests that pending for approval.
- **Categorization:** Breakdown by request type.

### 3. Approval Participation Details

This section provides insights into the involvement of users in the approval process. Details include:

- **Count of Requests:** The total number of requests that pending for approval.
- **Categorization:** Breakdown by request type.

## Create Request

PAS 2.0 introduces a streamlined and efficient process for raising requests for approval. This new process is designed to enhance user experience, improve transparency, and expedite approvals.

### Create New Approval Request

please fill all the **REQUIRED** fields

|  |  |
|--|--|
| <b>REQUEST TYPE</b> <b>REQUIRED</b><br><div>--Select Request--</div>                           | <b>REQUEST RAISED COMPANY</b> <b>REQUIRED</b><br><div>Stafford Motor Co. (Pvt) Ltd</div> |
| <b>REQUESTING BY</b> <b>REQUIRED</b><br><div>Pas Administrator</div>                           | <b>REQUESTING LOCATION</b> <b>REQUIRED</b><br><div>--Select Location--</div>             |
| <b>REQUEST HEADING</b> <b>REQUIRED</b><br><div>Enter short Heading about your request</div>    |  |
| <b>COVER NOTE</b> <b>OPTIONAL</b><br><div>Type here additional details about the request</div> |  |

IS THIS REQUEST WILL HAVE A SETTLEMENT REQUEST? **REQUIRED** ☒ Not Applicable for Settlement ☐ Yes, There will be another request as Settlement

Please select 'Yes' if you anticipate needing to settle this request in the future. If not, select 'No'. Keep in mind, selecting 'No' means the entered amounts won't be saved for future settlement requests. Once created, this action cannot be undone.

In PAS 2.0, you first select the type of request you want to create. Based on this selection, the system dynamically generates the required sections and fields. For some request types, additional steps appear after clicking the "Create Request" button, guiding you through the necessary information.

### Speech-to-Text Feature in PAS 2.0

In the Request heading and cover note section, you can use the speech-to-text feature if you're on a mobile device, laptop, or have an external microphone connected. By clicking the microphone button, you can dictate what you need to type, and it will automatically generate the text for you. Currently, only English is supported.

## Settlement Request Option in PAS 2.0

When raising a request in PAS 2.0, you must address the question: "Is this request will have a settlement request?" If the request you're creating requires another request for settlement (e.g., a purchasing request needing a subsequent payment request), select "Yes. There will be another request for Settlement."

If the request does not require a settlement request, select "Not Applicable for Settlement." It's crucial to select this option wisely before creating the request, as it cannot be changed afterward.

IS THIS REQUEST WILL HAVE A SETTLEMENT REQUEST? **REQUIRED** ☒ Not Applicable for Settlement ☐ Yes, There will be another request as Settlement

Please select 'Yes' if you anticipate needing to settle this request in the future. If not, select 'No'. Keep in mind, selecting 'No' means the entered amounts won't be saved for future settlement requests. Once created, this action cannot be undone.

## Purchasing Request – Important areas

please fill all the **REQUIRED** fields

**Add Supplier Quotations Here**

SUPPLIER **REQUIRED**  RECOMMENDATION **OPTIONAL**

Attachment  No file chosen

**Supplier Quotation List**

| SUPPLIER | RECOMMENDATION | ATTACHMENT | ACTION |
|----------|----------------|------------|--------|
|----------|----------------|------------|--------|

After submitting the main details for a purchasing request in PAS 2.0, you'll need to follow these steps:

- **Select Supplier:** Choose the supplier for the purchase.
- **Recommendation:** Add any relevant text for the recommendation.
- **Attach Quotation:** Upload the supplier's quotation document.
- **Add Supplier Record:** Click the "Add to Table" button to add the supplier's details to the request.

These steps ensure all necessary supplier information is included in the purchasing request.

### Supplier Quotation List

| SUPPLIER                  | RECOMENDATION | ATTACHMENT                | ACTION |
|---------------------------|---------------|---------------------------|--------|
| CHAMA COMPUTERS (PVT) LTD |               | Card payments-S625881.pdf | Remove |

Proceed to Add Items

After adding quotations to the table in a purchasing request, click the "Proceed to Add Items" button. This allows you to add the supplier-requested items and their unit prices, ensuring all necessary details are captured for the purchasing request.

| ITEM DESCRIPTION     | REQUIRED QTY                   | CHAMA COMPUTERS (PVT) LTD      |        |
|----------------------|--------------------------------|--------------------------------|--------|
| <input type="text"/> | <input type="text" value="0"/> | <input type="text" value="0"/> | Remove |

Add New Line

please fill all the **REQUIRED** fields

SELECT THE APPROVER YOU WANT TO SEND THIS REQUEST TO **REQUIRED**

To Managers

To Top Managers

Select the Approver

Send for Approval

After adding the items to the table in a purchasing request, you can send the request for approval. If your user level is "User," select the approver as "Manager." If you are at the "Manager" level and want to send the request directly to the top management, select "To Top Management" and then choose the appropriate approver.

## General Request.

For a General Request, the process is similar to a purchasing request or any other request type in PAS 2.0.

## Suspense Request

For the Suspense Request in the new update of PAS 2.0, several enhanced features have been added to improve usability and functionality.

Fill the Suspense Details

REQUESTING AMOUNT (RS.) REQUIRED

Rs.

AMOUNT IN WORDS REQUIRED

Double-check if this was auto-generated for clarity.

PURPOSE OF REQUESTING REQUIRED

REQUESTING FOR REQUIRED

SETTLING DATE REQUIRED

Proceed to Next Step

## Automatic Generation of Amount in Words:

- When entering the requesting amount, the system automatically generates the corresponding amount in words.
- However, users are reminded to double-check the generated amount in words section for accuracy and completeness.

## Employee Settlement Date and Month Range Selection

- For employee-related requests, the settlement date can now only be selected within one week from the current date.
- Employees at the field can choose the month range for their selections, providing flexibility within a specific timeframe while ensuring timely processing of requests.

In PAS 2.0 and onwards, when a Manager creates a request and chooses to approve the first level by themselves, selecting their own name from the manager approval dropdown will be recognized by the system. The system will automatically acknowledge that the manager has already approved the request at the creation stage, and it will proceed to the next process without the manager's name appearing in the pending request list.

This enhancement ensures that managers do not need to manually open and approve the request again after selecting their name for approval during the creation stage. It streamlines the approval process and reduces redundant steps for managers, improving overall efficiency within PAS 2.0.

## Cash Voucher – Important Areas

In the updated Cash Voucher feature of PAS 2.0, there have been several changes to improve functionality.

- **Select Payee:** Start by selecting the payee for the cash voucher.
- **Settlement Records Option:** After selecting the payee, the system will prompt you with the question, "Does this Payment Voucher have Settlement Records?" The default option is "No."
- **Selecting Yes for Settlement Records:** If there are settlement records that need to be added to the cash voucher, you should select the "Yes" option.

In the updated Cash Voucher feature of PAS 2.0, selecting "Yes" for Settlement Records triggers additional sections and steps for managing settlement records effectively. Here's how the process unfolds:

Upon selecting "Yes," the system displays the settlement section in the request.

- **Select Request Type:** Choose the appropriate request type related to the settlement from the dropdown menu.
- **Select Related Approval Number:** The system filters and displays only the approved requests related to the selected request type in the dropdown. Select the relevant approval number for settlement.
- **Amount to be Settled:** After selecting the approval number, the system shows the amount to be settled for that specific request.
- **Settling Amount:** Enter the amount you want to settle for the request in the provided field.

**Add to Table:** Click the "Add to Table" button to add the settlement details, including the request type, approval number, settling amount, and any other relevant information, to the settlement table.

By implementing these changes, PAS 2.0 ensures that only approved requests that are ready for settlement are displayed in the settlement dropdown list. This improves the management of settlement processes and reduces the number of pending settlements that were not properly managed in the previous system.

### Add Attachments to the Request

DETAILS OF EXPENDITURE REQUIRED

AMOUNT (RS.) REQUIRED

Rs. 0.00

COST CENTER REQUIRED

--Select the Cost Center--

ATTACHMENT

Choose File
No file chosen

Add

| DETAILS OF EXPENDITURE | AMOUNT (RS.) | COST CENTER | ATTACHMENT | ACTION |
|------------------------|--------------|-------------|------------|--------|
|------------------------|--------------|-------------|------------|--------|

please fill all the REQUIRED fields

SELECT THE APPROVER YOU WANT TO SEND THIS REQUEST TO REQUIRED

To Managers
To Top Managers

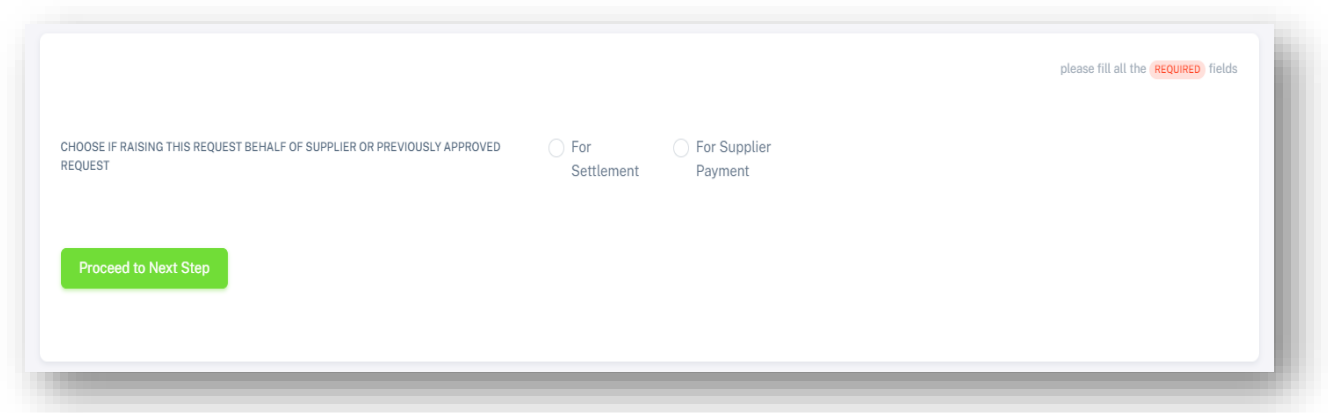
In the window shown after submitting the settlement details, you'll need to follow these steps to add expenditure details and proceed with approvals:

1. Expenditure Details:
  - Enter the details of the expenditure, including the amount.
  - Select the appropriate cost center from the dropdown menu.
2. Attach Relevant Attachment:
  - Upload any relevant attachments related to the expenditure.
3. Add to Table:
  - Click the "Add" button to add the expenditure record to the table.
4. Approvals:
  - Choose the relevant authorization person from the list provided for approvals.

Submit the request for approval once all details and attachments are added.

This process ensures that all expenditure details are accurately recorded and attached, and approvals are obtained from the appropriate personnel before final submission.

## Payment Request – Important Areas



The screenshot shows a web form for a payment request. At the top right, there is a note: "please fill all the **REQUIRED** fields". Below this, on the left, is the text "CHOOSE IF RAISING THIS REQUEST BEHALF OF SUPPLIER OR PREVIOUSLY APPROVED REQUEST". To the right of this text are two radio button options: "For Settlement" and "For Supplier Payment". At the bottom left of the form area is a green button labeled "Proceed to Next Step".

In the Payment Request feature of PAS 2.0, you'll be prompted to specify whether the request is for a settlement for a previously approved request or a direct supplier payment. Here's how the process works:

1. Settlement Request:
  - If the request is a settlement for a previously approved request, follow the process similar to the settlement details mentioned earlier. Add the settlement details to the table, including expenditure details, cost center, attachments, and approvals.
2. Direct Supplier Payment:
  - If the request is a direct supplier payment, you'll need to add the supplier details for this request. This includes selecting the supplier from the dropdown menu and providing any additional required information related to the payment.

By categorizing the payment request as either a settlement or a direct supplier payment, PAS 2.0 ensures that the appropriate details and actions are taken based on the nature of the payment request, streamlining the overall payment process.

DO YOU HAVE ANY OTHER RELATED DOCUMENTS TO UPLOAD TO THE REQUEST?

Yes

No

DESCRIBE THE FILE CONTENT REQUIRED

ATTACHED RELATED FILE REQUIRED

Choose File

No file chosen

Add to List

| SHORT DESCRIPTION OF THE FILE  | ATTACHMENT                                   | ACTION                              |            |        |
|--|--|-------------------------------------|------------|--------|
| Add Attachments to the Request   |  |                                     |            |        |
| INVOICE NUMBER <small>REQUIRED</small>   | INVOICE AMOUNT (LKR) <small>REQUIRED</small> | COST CENTER <small>REQUIRED</small> |            |        |
|  | LKR 0.00                                     | --Select the Cost Center--          |            |        |
| ATTACHMENT <small>REQUIRED</small>   |  |                                     |            |        |
| <div> <p>Choose File</p> <p>No file chosen</p> </div> <p>Add to Invoice List</p> |  |                                     |            |        |
| DETAILS OF EXPENDITURE   | AMOUNT (LKR)                                 | COST CENTER                         | ATTACHMENT | ACTION |
| IN25456  | 25000  | I.T Dep (ITDP)                      | testt.pdf  | Remove |

After submitting the previous section, the following section will appear for additional actions related to the payment request:

1. Upload Additional Documents (If Required):
  - The system asks whether there are additional documents related to the payment that need to be uploaded.
  - If yes, describe the content of the attachment and add the attachment.
  - Click the "Add to List" button to add the request to the table.
2. Payment Details:
  - If no additional documents are required, select "No" in response to the upload question.
  - Proceed to add payment details to the request
    - Type the invoice number and amount.
    - Select the cost center.
    - Add any necessary attachments related to the payment details.
  - Click the "Add to Invoice List" button to add the payment details to the table.

This process allows users to provide any necessary additional documents related to the payment request and input payment details accurately for efficient processing and record-keeping within PAS 2.0.

#### Vehicle Request

For the Vehicle Request in PAS 2.0, the process follows a similar workflow as the current PAS system.

#### Medical Request

For the Medical Request in PAS 2.0, the process follows a similar workflow as the current PAS system.

#### Local Purchasing Request

For the Local Purchasing Request in PAS 2.0, the process follows a similar workflow as the current PAS system.

## Vehicle Request Update – Workshop Users

Workshop users can update pending vehicle estimates by accessing the requests that need updating. Click "View" to open and edit the request.

The 'Request Details' form is divided into several sections:

- VEHICLE OWNERSHIP:** A dropdown menu showing 'Company owned'.
- VEHICLE TYPE:** A dropdown menu showing 'Motorcycle'.
- SERVICE LOCATION:** A dropdown menu showing 'RTN 140'.
- VEHICLE REQUEST IS FOR:** A dropdown menu showing 'Pas Administrator'.
- VEHICLE NUMBER:** A dropdown menu showing 'BII-5505'.
- CURRENT MILEAGE:** A dropdown menu showing '15000' with a unit of 'KM'.
- LAST SERVICE MILEAGE:** A dropdown menu showing '6000' with a unit of 'KM'.
- DETAILS OF THE SERVICE:** A text area containing 'FULL SERVICE' and 'CHECK BREAKS'.
- TYPE FURTHER DETAILS HERE:** A text area with the placeholder 'Make it short'.
- ATTACHMENT:** A section with a 'Choose File' button and the text 'No file chosen'.

At the bottom of the form, there are three buttons: 'Upload Estatement' (green), 'Decline Request' (red), and 'Go Back' (blue).

You can upload attachments and add any additional details needed in the vehicle estimate update section. Click "Upload Estimate" to select the Workshop Manager for approval.

The 'Request Details' form is shown in the background, but a modal dialog is open in the foreground. The dialog has a close button (X) in the top right corner. It contains the following elements:

- SELECT THE APPROVER YOU WANT TO SEND THIS REQUEST TO (REQUIRED):** Two buttons: 'To Manager' (green) and 'To Top Level' (grey).
- Select the Approver:** A dropdown menu showing 'Sampath Wasala Mudalige'.
- Buttons:** 'Close' (grey) and 'Send for Approval' (green).

The background form shows the 'DETAILS OF THE SERVICE' section with 'FULL SERVICE' and 'CHECK BREAKS', and the 'ATTACHMENT' section with a file named 'PASS RIZAA copyy.pdf'.

## My Request – Important Areas


In the "My Request" section, you will see the "Request Pending at Location" in the table. If you see the status as "Not Completed," it means you have accidentally closed the request before completing it. In a future update, this will be addressed so that you can reopen it and complete the request. However, for now, you can cancel the request by opening it and clicking the "View" button.

| My Requests     |   |              |                 |                  |                      |
|-----------------|---|--------------|-----------------|------------------|----------------------|
| Show 10 entries | Search Job Number: <input type="text"/> |              |                 |                  |                      |
| Request Number  | Request Type                            | Created Date | Request Heading | Request Timeline |                      |
| 32901           | General Request                         | 05-Jun-2024  | sdasd           | Approved         | <a href="#">View</a> |
| 32900           | Purchase Request                        | 05-Jun-2024  | Test            | Approved         | <a href="#">View</a> |


When you want to check your sent request, you can open it by clicking the "View" button. Then, you will see who approved your request and the time of approval, along with the detailed progress of your request.

Request Type **Suspense Request** Request Number **32875**

Request Approval Progress



**Nalin Bandara**  
APPROVED  
Manager IT  
5/31/2024 12:24:55 AM



**Approver Pending**  
PENDING APPROVAL  
Finance Department

67%

Request Body Details

REQUEST TYPE

REQUEST RAISED COMPANY

REQUESTING BY

REQUESTING LOCATION

REQUEST HEADING

## Cancel your request

If you need to cancel the request, you will need to open the request from "My Requests" and then scroll down to find the "Cancel Request" button. Click on this button to proceed with canceling the request.

Request Details

REQUESTING AMOUNT (RS.)

Rs. 1000.00

AMOUNT IN WORDS

One Thousand Rupees Only

PURPOSE OF REQUESTING

Test

REQUESTING FOR

Heshan Yajas

SETTLING DATE

06-Jun-2024

Cancel Request

Go Back

## Downloading your Approval

For security purposes, you cannot cancel a request after it has been approved. If you want to download the approval, you need to open the approved request from your "My Requests" section. Scroll down to the bottom, where you will find the "Download Approval" button.

Please note that in a future update of PAS 2.0, after receiving approval for your request, the approval will also be emailed to you for your records.

Attached Invoice Details

Invoice Number: IN25000

Cost Center: Assemble (ASMB)

Amount: 15200.00

View

Total Amount for Attached Invoice Details: 15200.00

Settlement Details

| REQUEST TYPE           | APPROVED AMOUNT | SETTLING AMOUNT |
|------------------------|-----------------|-----------------|
| Purchase Request       | 475000.00       | 15000.00        |
| General Request        | 700.00          | 200.00          |
| Total Settling Amount: |                 | 15200.00        |

Download Approval

Go Back

## Conclusion

This update marks a significant milestone in enhancing the performance and functionality of the PAS system. Our primary focus has been to address the slowness issues that users have encountered in the current system, ensuring a smoother and more efficient user experience.

With this update, we have streamlined the request creation process and incorporated all the essential features necessary for fulfilling users' basic needs within the PAS environment. Whether it's submitting requests, tracking approvals, or managing pending tasks, the PAS 2.0 update aims to provide a comprehensive solution that caters to users' requirements.

Looking ahead, our development team is committed to further enhancing the PAS system with additional features and improvements. Future updates will be rolled out incrementally, introducing new functionalities and enhancements step by step. As a user, you can expect to be kept informed about these updates and any new features that are introduced.

We believe that these ongoing efforts will continue to elevate the PAS system, empowering users with a robust and efficient platform for managing their tasks and requests effectively.

Thank you for participating in this demo and for your valuable feedback.