



**Software User Guide of IDP  
Manager Portal**

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**Revision History**

Date	Version	Author	Change
2025/02/18	1	Amarangi Karunathilaka	Login Forget Password
2025/03/20	2	Amarangi Karunathilaka	Basic Organization Settings

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## 1. Introduction to the user guide

### *Introduction to User Manual: IDP User Management*

This guide is designed to provide you with a detailed understanding of how to effectively manage users and assign privileges within the IDP system. Privilege assignment is a crucial aspect of ensuring secure and efficient system operation. Whether you are an administrator responsible for configuring access levels or a user seeking to understand the permissions associated with your account, this manual will serve as your go-to resource.

### 1.1 Key features

**Role-Based Access Control (RBAC):** Create and customize roles based on job responsibilities or organizational hierarchy.

**Granular Permissions:** Assign precise permissions to users or roles, ensuring that individuals have access only to the functionalities necessary for their tasks.

**User-Friendly Interface:** The system boasts an intuitive interface for seamless privilege assignment, minimizing the learning curve for administrators.

### 1.2 How to use this Manual

Navigate through the sections to discover step-by-step instructions, best practices, and tips for effective privilege assignment. Whether you are new to the system or a seasoned administrator, this manual is structured to cater to users of all levels.

Thank you for choosing our company for building your system, and we trust that this User Manual will be an invaluable resource as you optimize user privilege assignments within your organization. Let's embark on this journey of secure and tailored access together!

## 2. Introduction to the IDP System

### 2.1 Purpose

The project is focused on developing a comprehensive task management system aimed at enhancing and streamlining operations for three primary stakeholders: the Super Admin, Manager, and Staff Portal users. Each user group has distinct roles and responsibilities within the system, and the platform is designed to equip them with the necessary tools for efficient event execution.

The project aims to create a unified and integrated platform that enhances task management, promotes user collaboration, and enables stakeholders to efficiently fulfill their roles. It encompasses customer management, staff management, task tracking, and reporting. The system simplifies customer onboarding, service agreements, and billing processes while optimizing staff scheduling and ensuring timely task completion. It also monitors customer service activities and provides insights to support data-driven decisions and performance analysis. The primary objective is to automate key operations, boost efficiency, and elevate the quality of service delivery.

### 2.2 Scope

#### 2.1. In Scope

- **Manager Portal(Admin)** : Manager portal will be used by the organization owners, managers for management, planning and operations of staff and customers.
- **Staff Portal** : The staff portal will be used by staff who are doing tasks assigned by the managers for relevant customers.

#### 2.2. Out Of Scope

- **Admin Portal(Super Admin)** : The portal will be used for managing vendors, subscribed plans and payments/billings associated with these plans.

- The complete admin portal functionalities have not been finalized.

## 2.4 Overview

The purpose of this user guide document is to describe the steps to follow for the IDP manager and staff portal navigation. The portals will offer a comprehensive platform for managers and staff to make and manage tasks and track the progress.

The IDP will be divided into three parts: the Manager(Admin) Portal, the staff Portal and Admin(Super Admin) Portal.

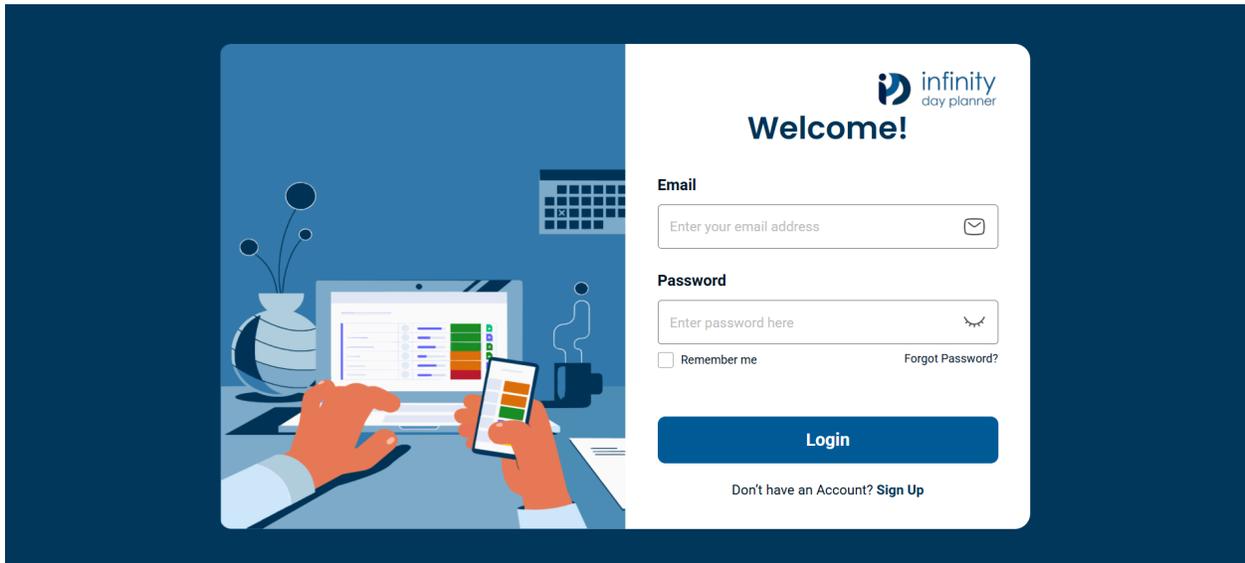
- The manager can be onboarded to the IDP system through a redirect from the corporate website. They will have access to comprehensive system information via the dashboard. The manager's responsibilities include managing contracts, work orders, leave management, scheduling, time tracking, and staff management. They can also oversee user management by adding users, assigning roles, and generating reports based on system activities.
- Staff will have access to a list of tasks assigned by the manager. They can clock in and out for tasks, apply for leave, and take breaks during tasks. The system will also display routes for work orders to complete tasks and allow staff to provide comments aligned with each task.
- The super admin will oversee the management of customers onboarded to the system. The admin will handle country and industry setup, which will be reflected in the manager portal, as well as manage subscriptions. Additionally, the admin will have access to comprehensive system information through the dashboard.

## 2.5 Manager Portal Modules

Manager Portal :

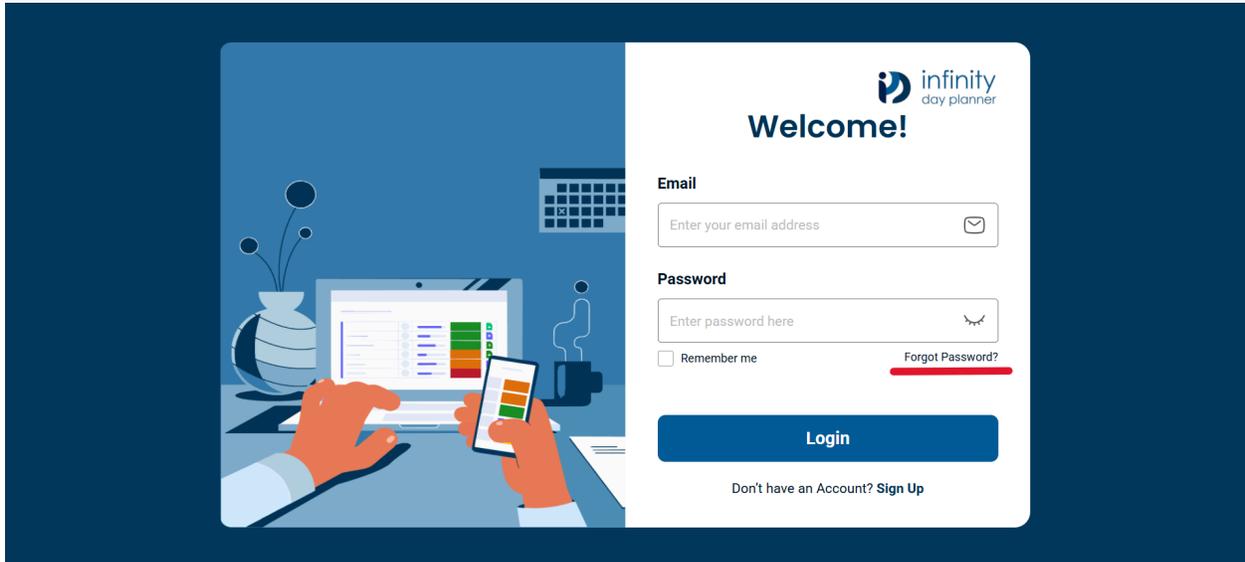
- I. Login  
Allow users to securely authenticate and access the manager portal for managing system functionalities and data.
  
- II. Forget Password  
Allow registered users to securely reset their passwords if they forget or need to change them.
  
- III. Basic Organization Settings  
Allow registered users to create branches to their organizations.

## 2.5.1 Login

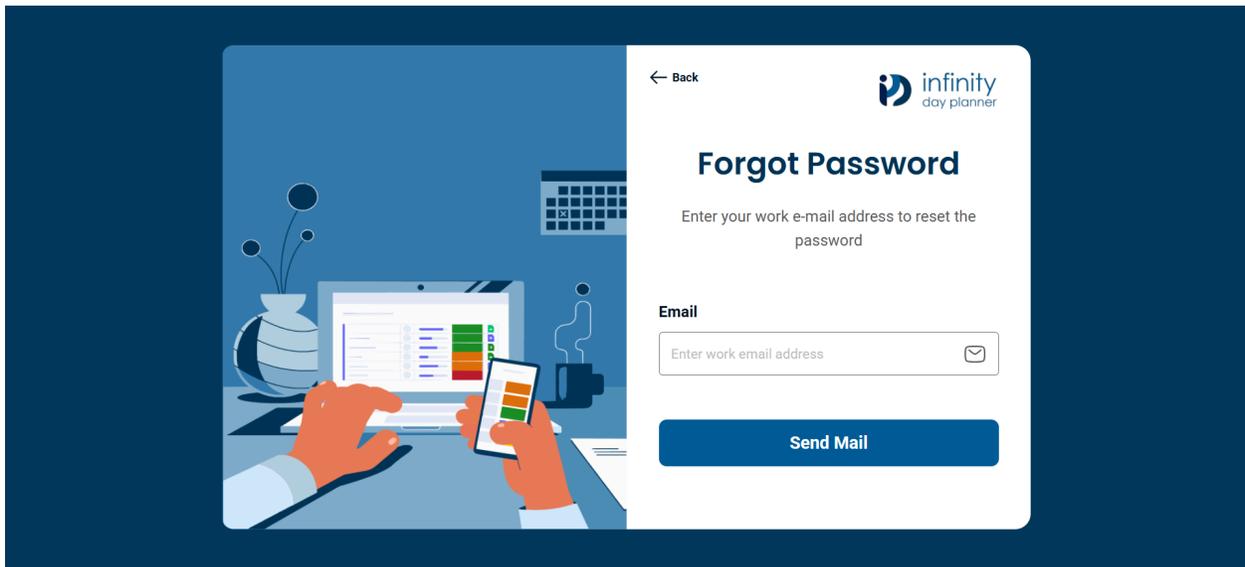


- Open the IDP system URL in your web browser.
- Enter your **Email and Password** in the designated field and click the login button.
- Check "**Remember Me**" if you want to stay logged in.
- If the "**Remember Me**" is not selected, then automatically logged out 3 minutes after logging in.
- If login is successful, you'll be redirected to the "Dashboard".
- If login fails, check your credentials and try again.

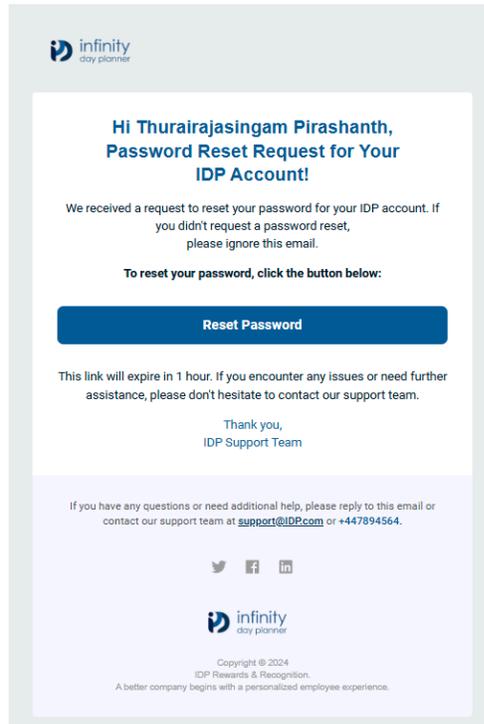
## 2.5.2 Forget Password



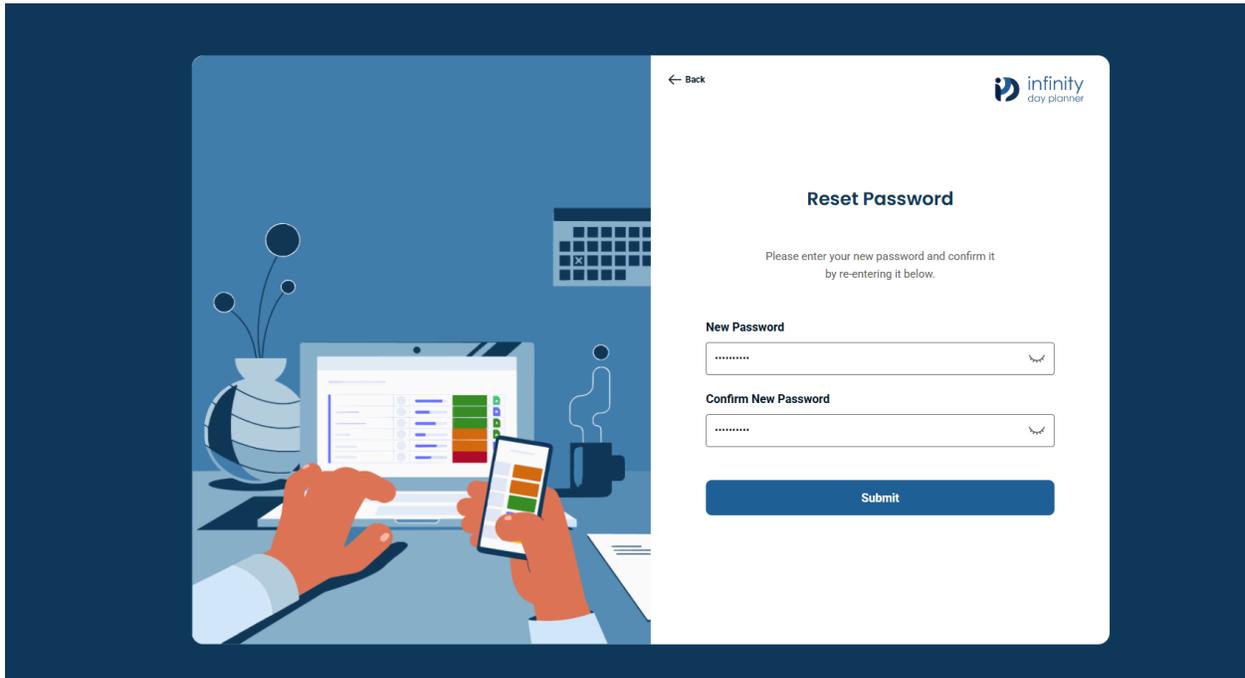
- On the **Login Page**, click "**Forgot Password?**" below the password field.



- Once after the user clicks the **“Forgot password”** link then the user should be able to see the screen to enter the registered **“Email”** address.
- Click the **“Send Mail”** button.
- Then the user will receive an email with the **“Reset Password”** option.



- Click the **“Reset Password”** button to redirect to the **“Reset Password”** screen.



- Once after redirecting to **"Reset Password"** screen, will get the following fields
  - New Password
  - Confirm Password
- Must be required to input both the **"New Password"** and the **"Confirm New Password"** passwords before clicking the **"Submit"** button.
- Once successful, you'll see a confirmation message. Click **"Login"**.
- Enter your **Email** and **new Password** and click **"Login"** to access the system.

## 2.5.3 Basic Organization Settings

- After logging in to the system, as a first time user, the user should be able to set up branch information, contact information, opening settings and shift configuration related to the organization.

### 2.5.3.1 Branch Information

- First, set up the owner details of the organization.

**Organization Settings**

Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.

1 Branch Information — 2 Contact Information — 3 Opening Setting — 4 Shift Configuration

**Organization Settings**

Fill out the business owner details below to get started with setting up your business

**Owner Details**

1 of 4 steps completed

**Owner First Name \***

**Owner Last Name**

**Next**

**Cancel**

- Next, set up office details of the branch.

**Organization Settings**  
Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.

1 Branch Information — 2 Contact Information — 3 Opening Setting — 4 Shift Configuration

← Back

**Organization Settings**  
Enter your office name and website URL.

**Office Details**  
2 of 4 steps completed

**Office Name \***

**Web Site URL**

Is Head Office

Next

Cancel

- After that, set up address details of the branch with defining areas using the map.



**Organization Settings**

Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.

- 1
- Branch Information
- 2
- Contact Information
- 3
- Opening Setting
- 4
- Shift Configuration

← Back

**Organization Settings**

Enter the details below to continue with the setup.

**Address**

3 of 4 steps completed

**Door Number \***

Ex: No: 50

**Address Line 1 \***

Enter your address

**Address Line 2**

Enter your address

**City/Town \***

Enter your city or town

**Postcode \***

Enter your postalcode

**Country \***

**Area Details**

0 Area

Search here...

No	Area Name	Marked location(s)	Description
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No Data

**Define Area**

You can define areas by clicking on the map.

**Area Name \***

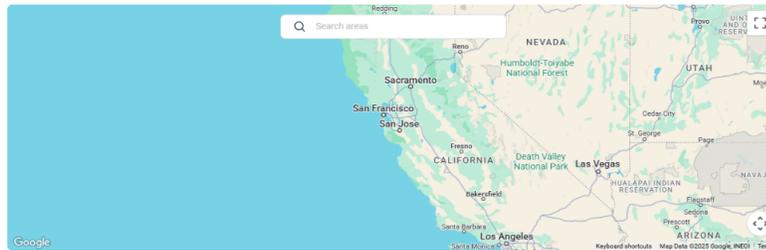
Enter area name

**Description**

Add description here...

**Mark Location(s)**

Use the map to search for and add areas by clicking on the desired locations.



No	Area Name	Marked location(s)	Description	Action
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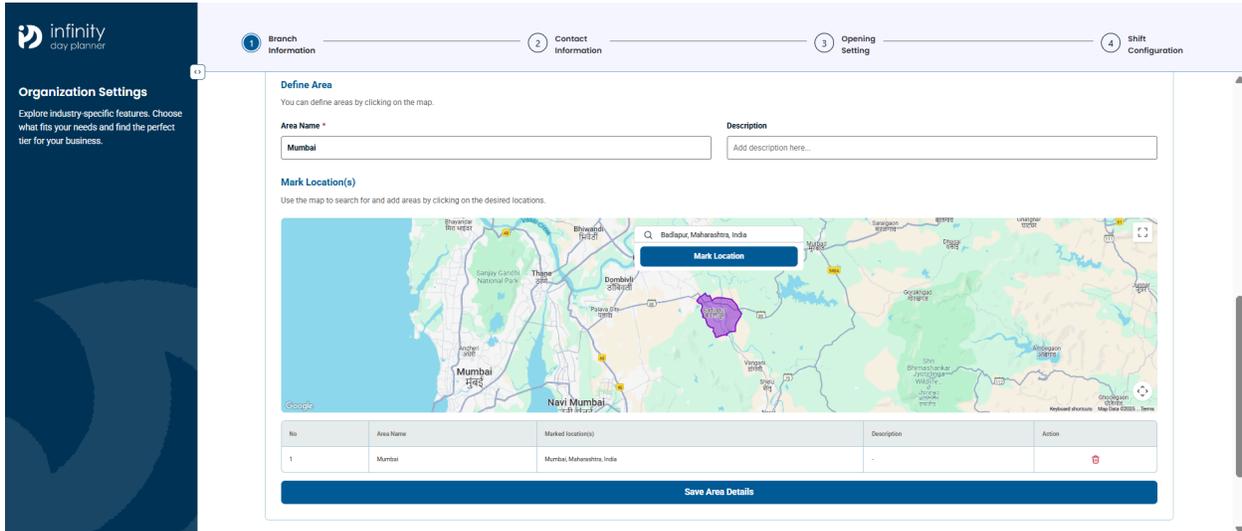
No Data

Save Area Details

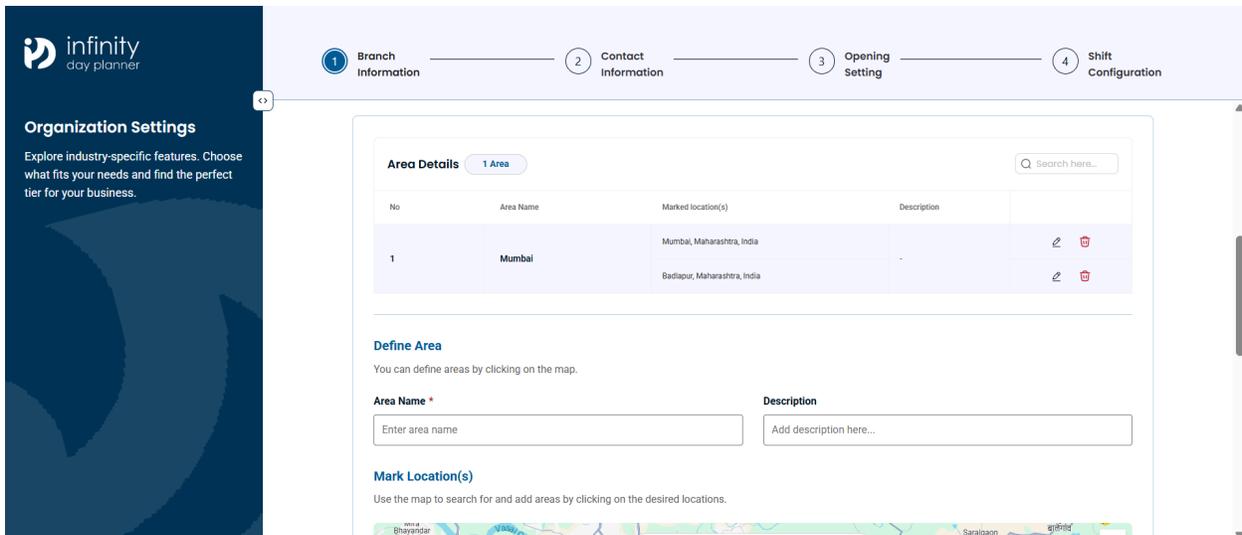
Next

Cancel

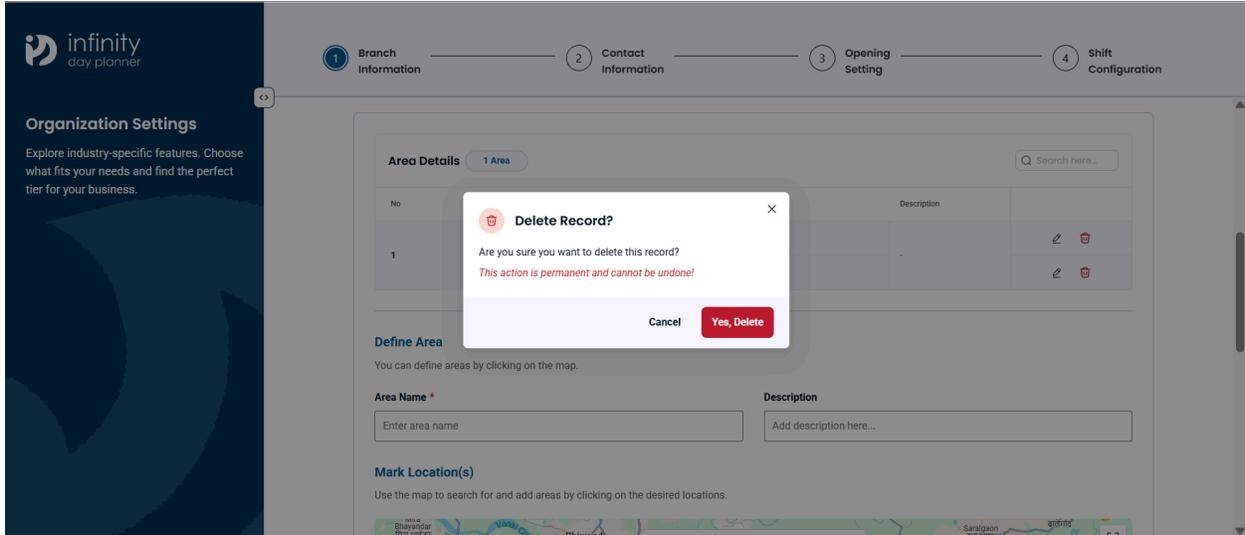
- When searching through the map, the searched location will be shown as an area on the map. Click the **“Mark location”** button to select the specific location to that particular area. Then that location will add to the below table.



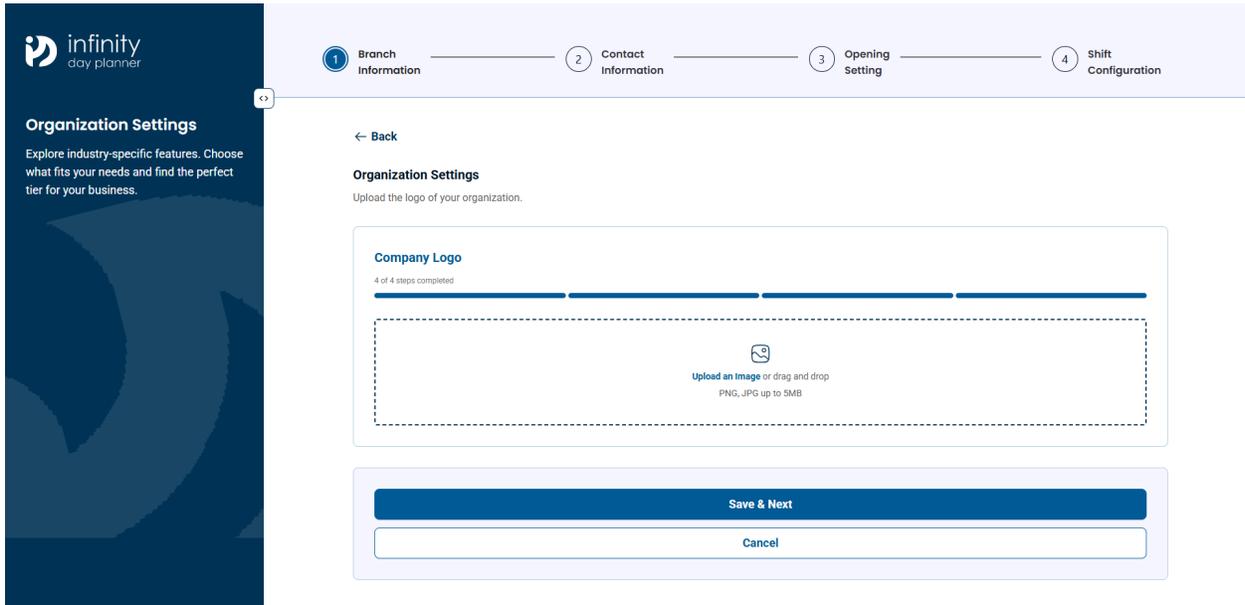
- After saving the area details, then it will be displayed in the **“Area Details”** table.



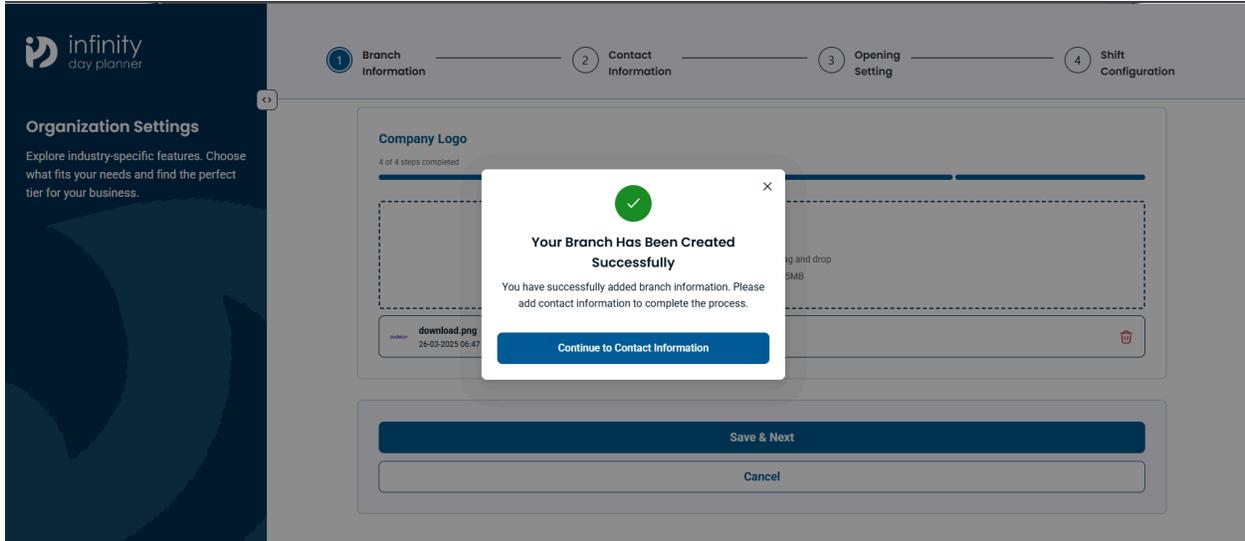
- Added area details can be deleted through the “delete” option in the table and edit through “edit” option in the table



- As the next step, set up the company logo of the branch.



- After adding the basic details of the branch, a popup message should appear regarding the success message.



## 2.5.3.2 Contact Information

- After setting up the basic information, add contact information of the branch as primary contact information.

The screenshot shows the 'Organization Settings' interface. On the left is a dark blue sidebar with the 'infinity day planner' logo and the text 'Organization Settings' and 'Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.' The main content area has a light blue header with a progress bar showing four steps: 1. Branch Information (checked), 2. Contact Information (active), 3. Opening Setting, and 4. Shift Configuration. Below the header is a '← Back' link and the title 'Contact details - Codelantic (Pvt) Ltd.' with the instruction 'Enter primary contact details.' The main form is titled 'Primary Contact Details' and shows '1 of 2 steps completed' with a progress bar. It contains several input fields: 'First Name \*' (text input), 'Last Name' (text input), 'Contact Number 1 \*' (dropdown menu), 'Contact Number 2' (dropdown menu), and 'Email Address \*' (text input). At the bottom of the form are two buttons: 'Next' (blue) and 'Cancel' (white).

- Next, add secondary contact information.

Organization Settings

Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.

Branch Information

Contact Information

Opening Setting

Shift Configuration

← Back

Contact details - Codelantic (Pvt) Ltd.

Enter secondary contact details.

Secondary Contact Details

2 of 2 steps completed

First Name \*

Enter first name

Last Name

Enter last name

Contact Number 1 \*

Enter contact number 1

Contact Number 2

Enter contact number 2

Email Address \*

Enter primary person email address

Save & Next

Cancel

- After adding the contact details of the branch, a popup message should appear regarding the success message.

Organization Settings

Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.

Branch Information

Contact Information

Opening Setting

Shift Configuration

← Back

Contact details - Codelantic (Pvt) Ltd.

Enter secondary contact details.

Successfully Added Contact Information

Contact Information has been successfully added. Please proceed with Opening Setting

Continue to Opening Setting

First Name \*

Amarangi

Last Name

Garunathilaka

Contact Number 1 \*

+93 11 234 4567

Contact Number 2

+93 Enter contact number 2

Email Address \*

amarangi@codelantic.com

## 2.5.3.3 Opening Settings

- After adding the contact information, add opening settings of the branch.

The screenshot displays the 'Opening Settings' configuration page for 'Codelantic (Pvt) Ltd.'. The interface includes a sidebar on the left with the 'infinity day planner' logo and 'Organization Settings' section. The main content area features a progress bar at the top with four steps: 'Branch Information', 'Contact Information', 'Opening Setting' (the current step), and 'Shift Configuration'. Below the progress bar is a 'Back' button and the title 'Opening Setting - Codelantic (Pvt) Ltd.' with a subtitle 'Configure the branch Opening and Closing hours.' The main form area is titled 'Opening Settings' and contains a list of days from Monday to Sunday. Each day has a checkbox, a 'Closed' status with a refresh icon, and a plus sign button. At the bottom of the form are two buttons: 'Save & Next' and 'Cancel'.

- When clicking the (+) button, it will open another section to specify the closing and reopening times by setting a time frame with instructions “Specify the times when the organization will reopen after being closed”.

**Organization Settings**  
Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.

← Back

**Opening Setting - Codelantic (Pvt) Ltd.**  
Configure the branch Opening and Closing hours.

**Opening Settings**

<input checked="" type="checkbox"/>	Monday	09:00	AM	To	05:00	PM	+	
<input checked="" type="checkbox"/>	Tuesday	09:00	AM	To	05:00	PM	+	
<input checked="" type="checkbox"/>	Wednesday	09:00	AM	To	05:00	PM	+	
<input checked="" type="checkbox"/>	Thursday	09:00	AM	To	05:00	PM	+	
<input type="checkbox"/>	Friday	Closed						+
<input type="checkbox"/>	Saturday	Closed						+
<input type="checkbox"/>	Sunday	Closed						+

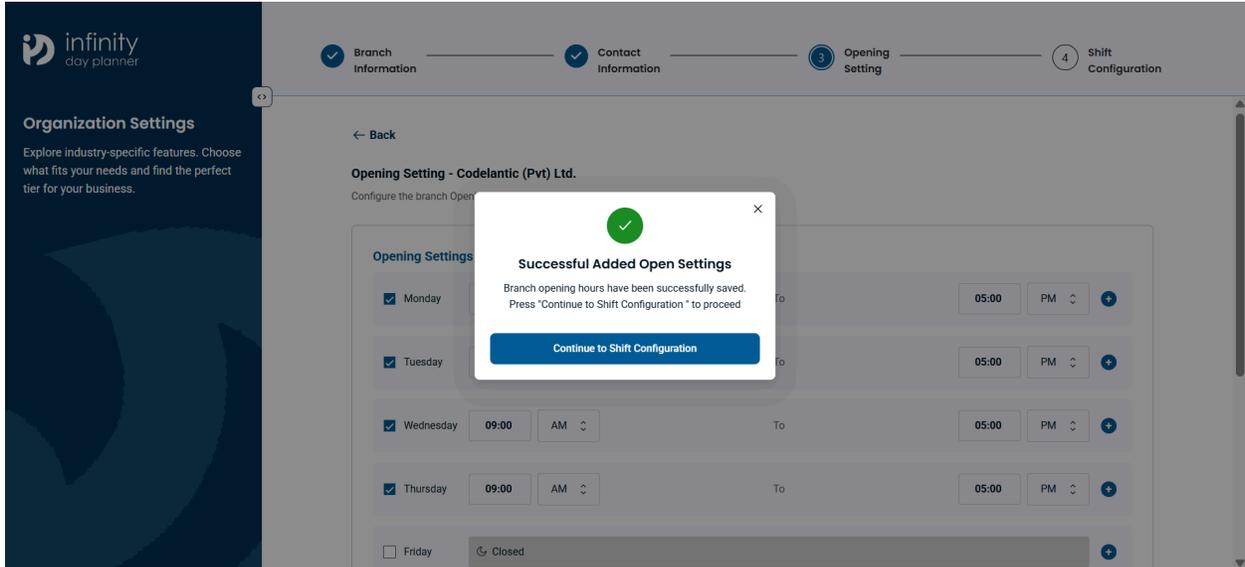
**Return**  
Specify the times when the organization will reopen after being closed.

Time AM To Time PM -

**Save & Next**  
Cancel

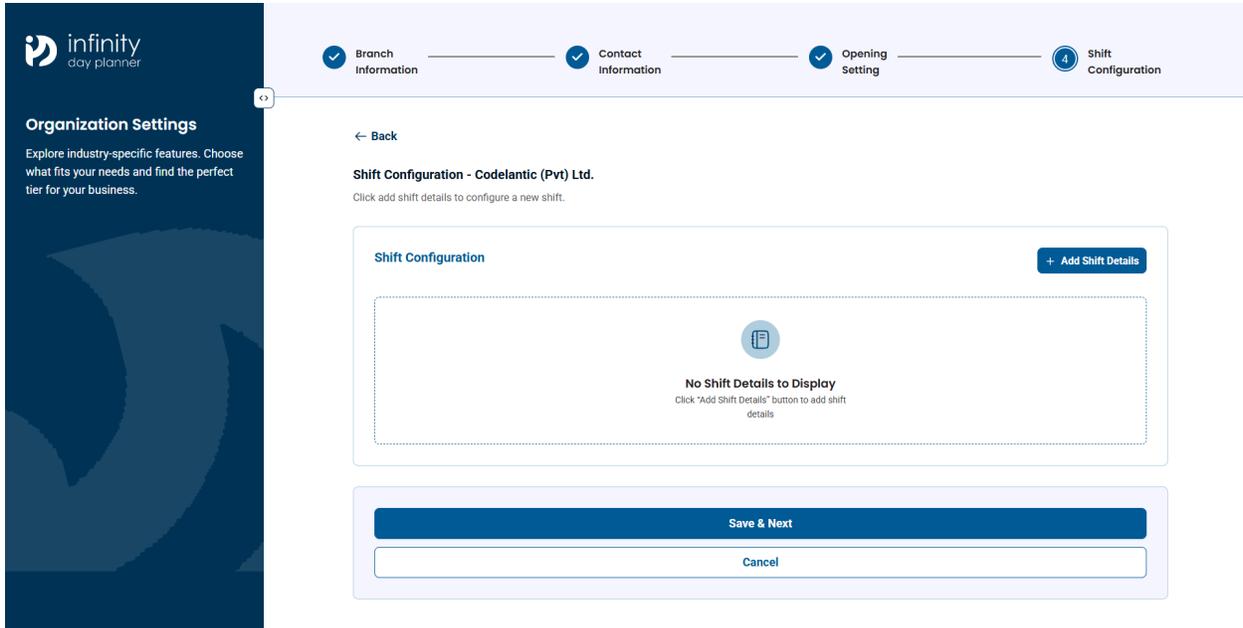
- There will be a (-) button in the reopening and closing time setting section, click that to discard reopening and closing details.

- After adding the opening settings of the branch, a popup message should appear regarding the success message.

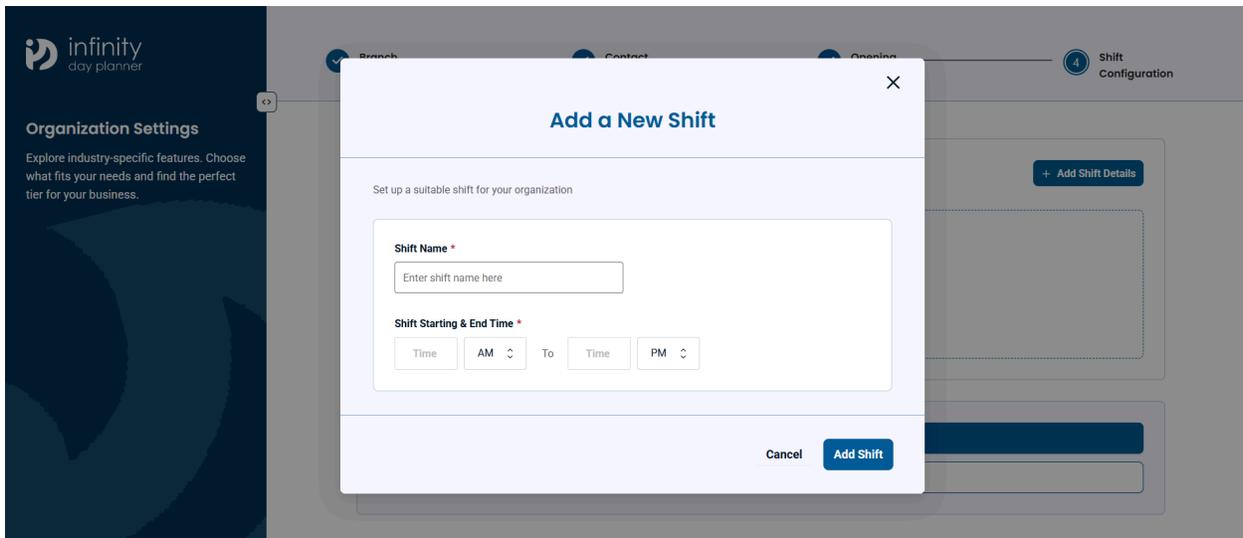


## 2.5.3.4 Shift Configuration

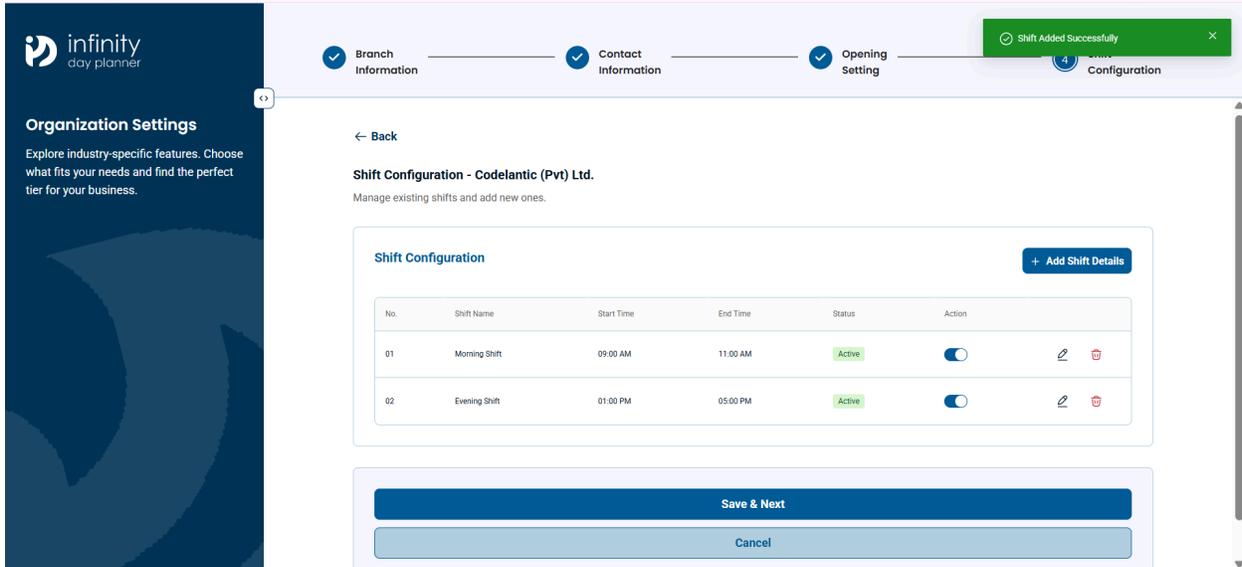
- In the basic organization settings the final step is to set up the shift configuration in the branch. This will be the initial screen for a first time user.



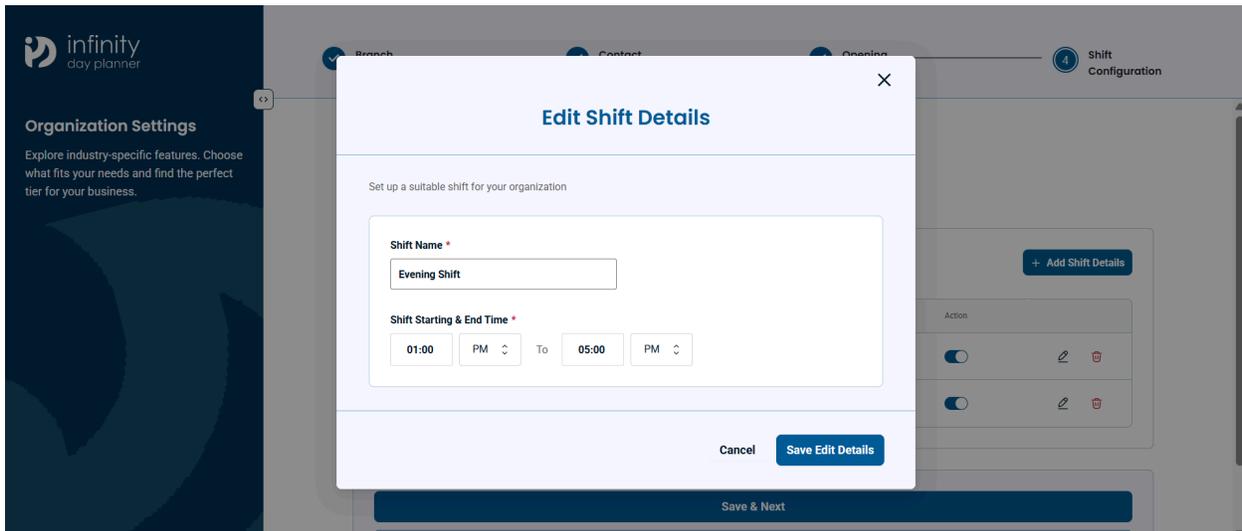
- Through "Add Shift Details", add a new shift to the branch.



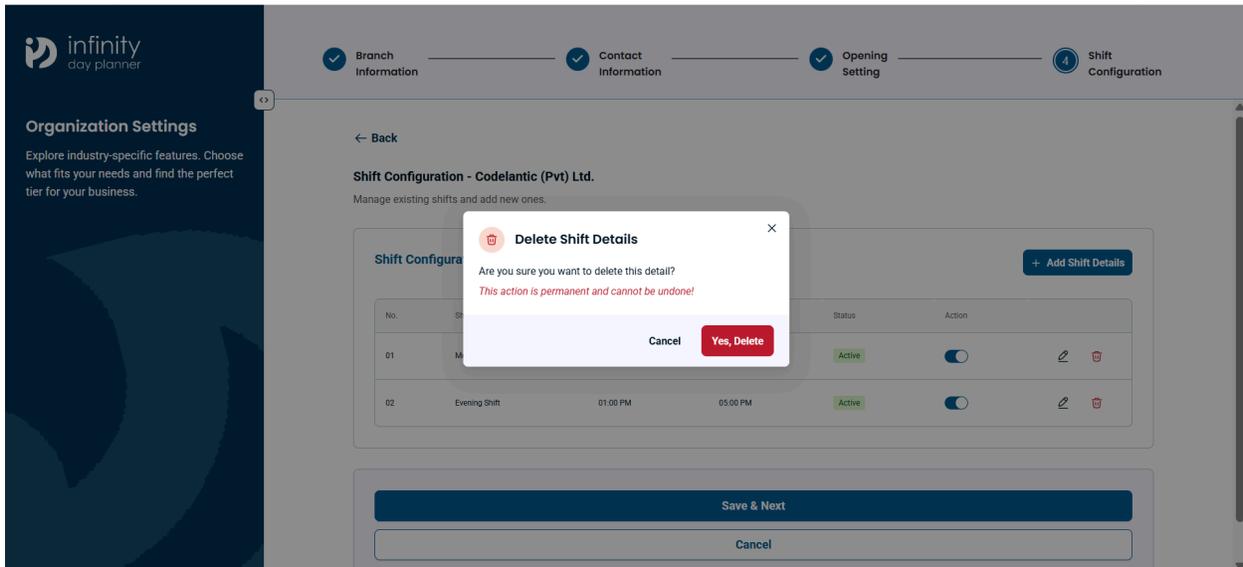
- After that, added shift details will be displayed in a table.



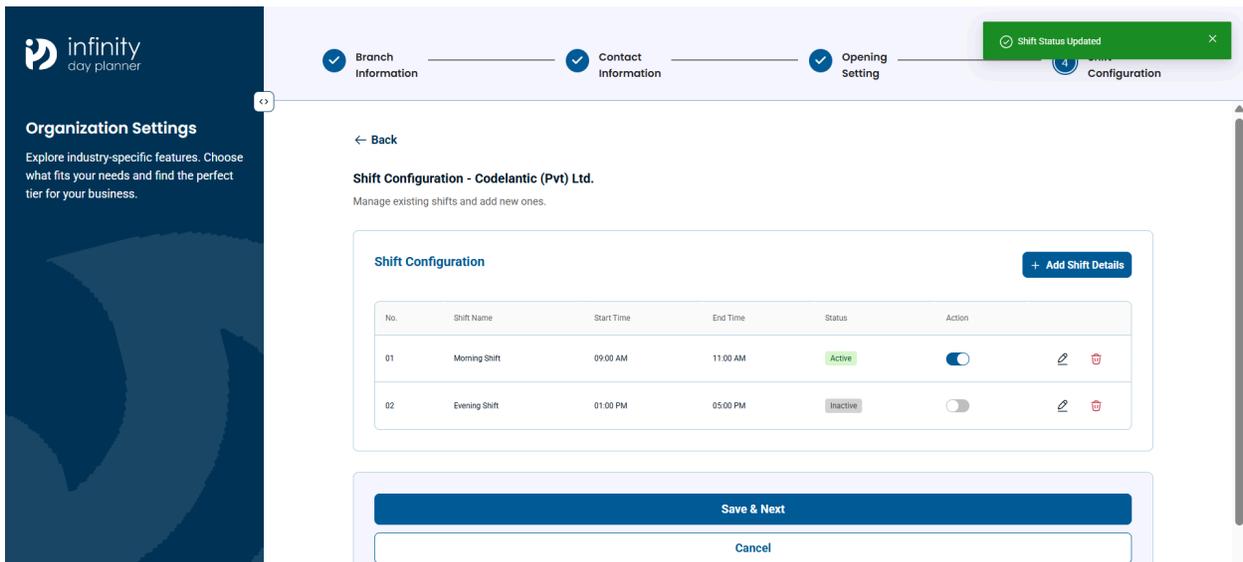
- Added shift details can be edited by redirecting through the “edit” option in the table.



- Added shift details can be deleted by redirecting through the “delete” option in the table.



- Use the toggle in the table to enable or disable a shift.



- After adding the shift details of the branch, a popup message should appear regarding the success message.

