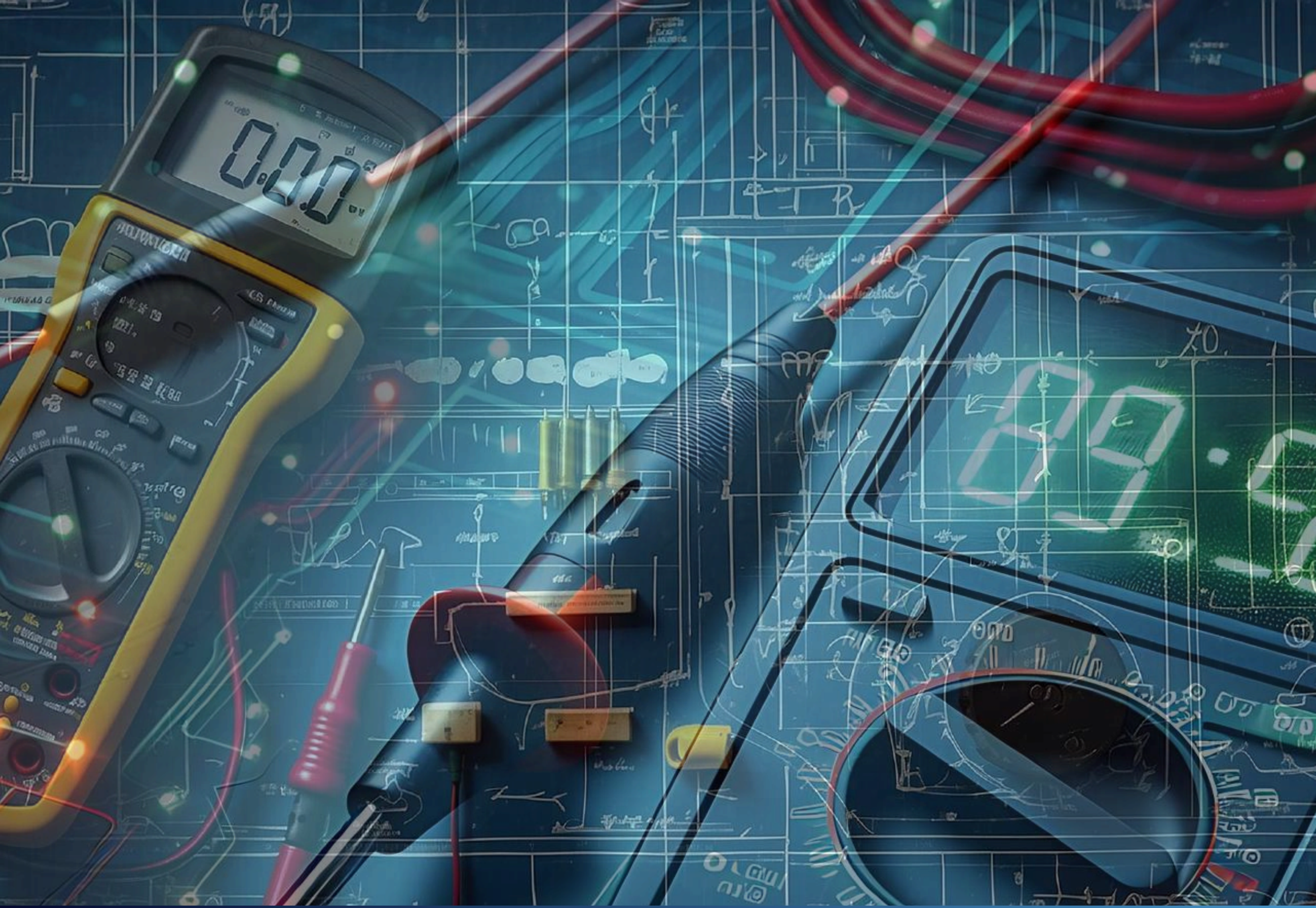


CALPORTAL

STANDARD GUIDE & MANUAL

By Bestlabs Singapore Pte. Ltd.

TABLE OF CONTENTS FOR CALPORTAL MANUAL

Welcome to CalPortal - Bestlabs Singapore

Dear User,

Thank you for choosing CalPortal, a dedicated platform designed by Bestlabs Singapore to enhance your calibration and asset management processes.

This system provides you with a seamless experience for managing calibration schedules, tracking assets, generating reports, and maintaining compliance.

With features such as role-based access control, document tracking, vendor management, and detailed instrument records, CalPortal ensures operational efficiency and accuracy.

This guide will help you navigate the system and make the most of its capabilities. If you have any questions, feel free to reach out to our support team.

We're here to assist you in every step of your journey with CalPortal.

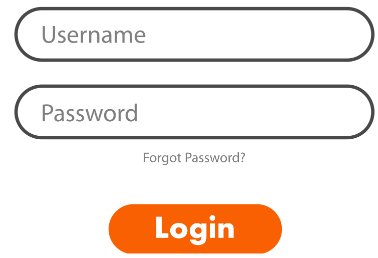
Happy Managing!

Development Team,
Bestlabs Singapore

2. Getting Started

2.1 Step 1: Logging into CalPortal

1. Open your web browser and navigate to the CalPortal login page at https://www.bestlabs.sg/crm/calportal/.
2. Enter your username and password provided by the system administrator.
3. Click the Login button.
4. If you have forgotten your password, click Forgot Password and follow the instructions to reset it.



Note: Ensure your browser supports cookies and JavaScript for optimal functionality.

2.2 Step 2: Exploring the Dashboard

1. Upon successful login, the Dashboard will display:
   - Pending Tasks: Lists tasks awaiting action.
   - Recent Activities: Shows a log of recent actions taken.
   - Notifications: Alerts about upcoming calibrations, overdue tasks, or system updates.
2. Use the navigation menu on the left to access various modules such as Calibration, Assets, and Administration.

3. Dashboard Content

3. Dashboard Content Overview

3.1 Tracking System

The tracking system allows users to monitor the progress of:

- Calibration Tasks: Displays current status (Scheduled, In Progress, Completed).
- Purchase Requests: Tracks requests from initiation to completion.

3.2 Document Status

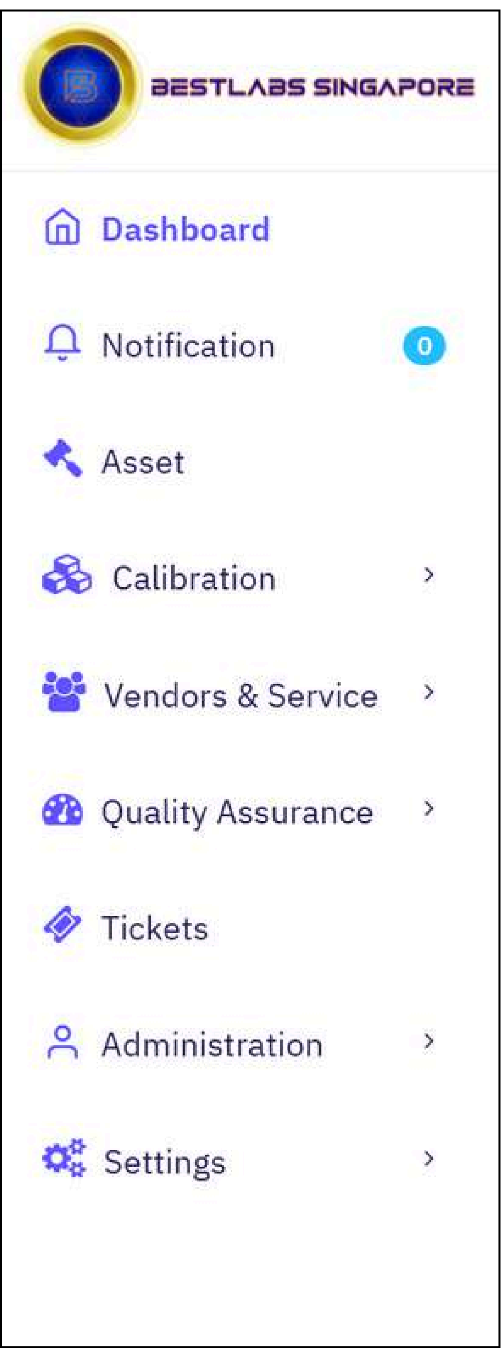
The Document Status section shows:

- Pending Approvals: Lists documents awaiting manager approval.
- Verified Documents: Displays documents that have passed verification.

3.3 Document List

The Document List tab provides a searchable list of all uploaded documents, including:

- Calibration certificates
- Purchase orders
- Delivery notes



3.4 Below is a step-by-step simplified guide to help you understand the sections in the main navigation bar:

1. **Dashboard**
   - This is the main page you see after logging in.
     - It provides an overview of key metrics, activities, and essential system information.

2. Notification
- Displays important alerts or updates related to the system.
  - You can view reminders, warnings, or process-related notifications here.

3. Asset
- Shows details about assets managed by your organization.
  - This could include equipment, tools, or inventory currently in use.

4. Calibration
- Contains information and tasks related to equipment calibration.
  - You can view, manage, or track ongoing calibration activities.

5. Vendors & Services
- Lists vendors and service providers your organization works with.
  - You can track vendor details, contracts, or services provided.

6. Quality Assurance
- Manages processes related to quality control and assurance.
  - This helps ensure compliance with industry standards and internal protocols.

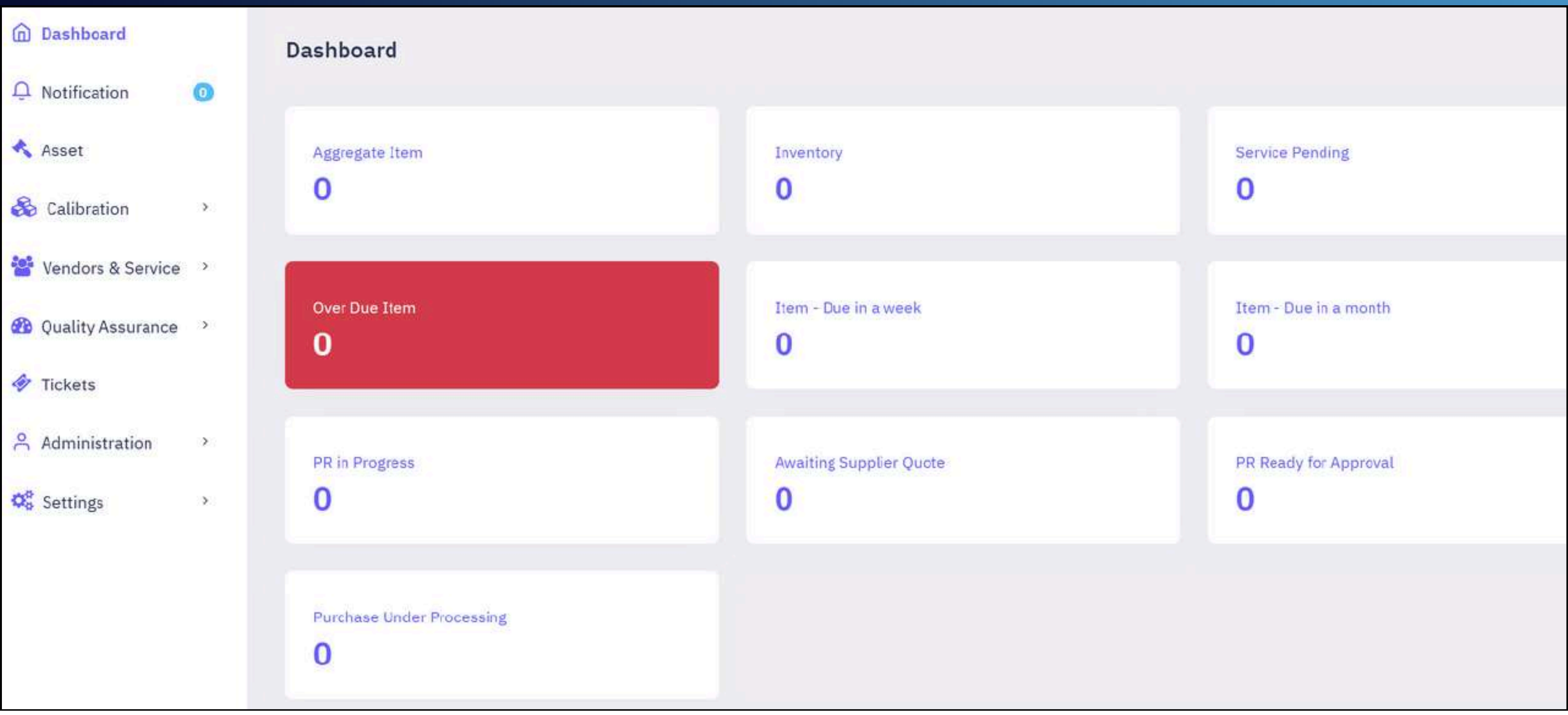
7. Tickets
- Displays tickets or issues that need attention.
  - You can use this section to report, view, and manage problem resolutions.

8. Administration
- Contains administrative tools for managing users, roles, and permissions.
  - Only accessible by authorized personnel for system management.

9. Settings
- Allows configuration of system preferences and features.
  - You can update system settings according to your operational needs.

This guide provides a clear understanding of each section's purpose to ensure efficient navigation.

3.4 Dashboard Simplified Guide



1. Aggregate Item

- Shows the total number of items across all categories.
    - Helpful for getting a quick overview of your inventory.

2. Inventory

- Displays the total number of items currently in stock.
    - You can track overall inventory levels here.

3. Service Pending

- Indicates the number of services or tasks that are still awaiting completion.
    - Use this section to stay updated on pending tasks.

4. Overdue Item

- Shows the count of items that are past their due date.
    - Important for identifying and prioritizing overdue tasks or services.

5. Item - Due in a Week/Month

- Lists items that are scheduled for service or action within the next week or month.
    - This helps in planning upcoming tasks.

6. PR in Progress

- Displays the number of active purchase requests.
    - Useful for tracking the progress of ongoing procurement activities.

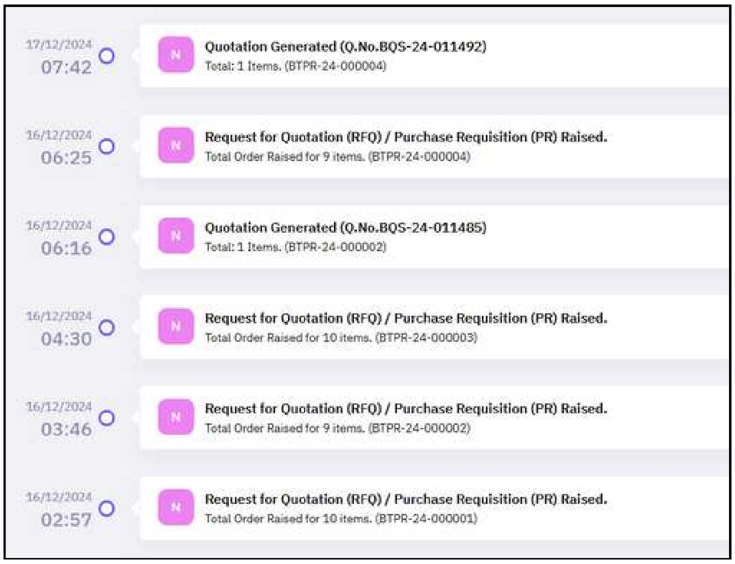
7. Awaiting Supplier Quote

- Shows requests that are waiting for supplier responses or quotes.
    - Keep track of pending supplier communications here.

8. PR Ready for Approval

- Lists purchase requests that are ready for managerial approval.
    - This helps streamline the approval process.

3.4.1 Notification Content



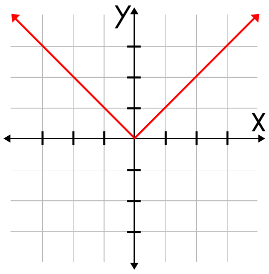
Notification refers to a message or alert that informs a user about a specific process.

- Date: Notification date.
- Time: Notification time.
- Description: Brief event description.
- Details: Additional information, such as PO or PR numbers.

3.4.1.1 Asset Content

1. Instrument Name
- Displays the name or a brief description of the instrument.
- Helps in identifying the specific asset quickly.

2. Vendor Name
- Shows information about the supplier or vendor who provided the instrument.
- Useful for tracking supplier details and procurement history.

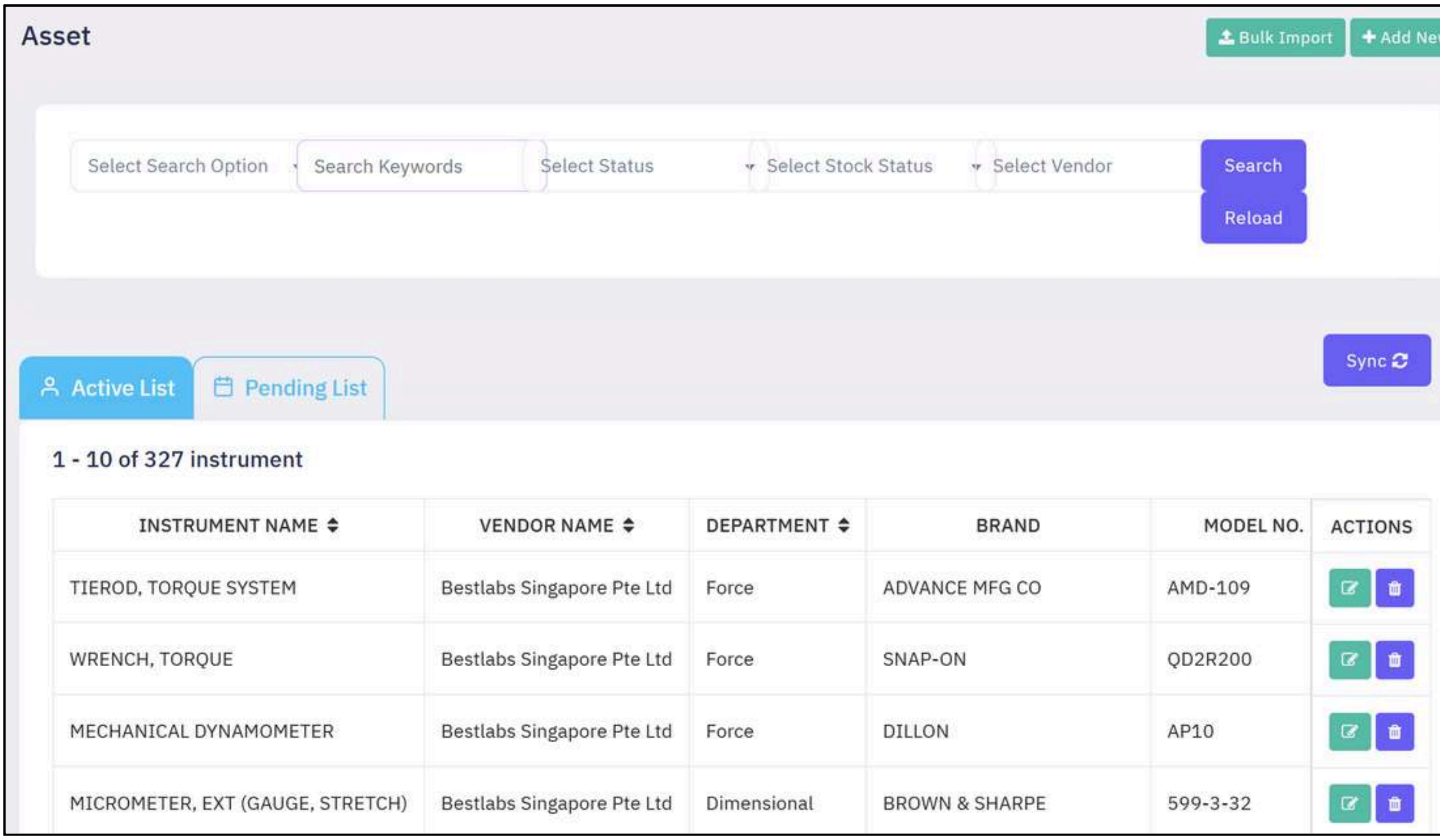


3. Department
- Indicates the department or organizational unit currently using the instrument.
- Helps in assigning and managing assets by department.

4. Brand & Model No.
- Provides details about the instrument's manufacturer, including the brand and model number.
- Essential for tracking specifications and maintenance requirements.

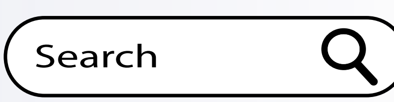
5. Range
- Describes the instrument's capabilities, such as its measurement range or operating limits.
- Important for ensuring the instrument is suitable for specific tasks.

6. Actions
- Contains buttons or links for managing the asset.
- Common actions may include editing, viewing details, or initiating calibration/service.



7. Search and Filtering

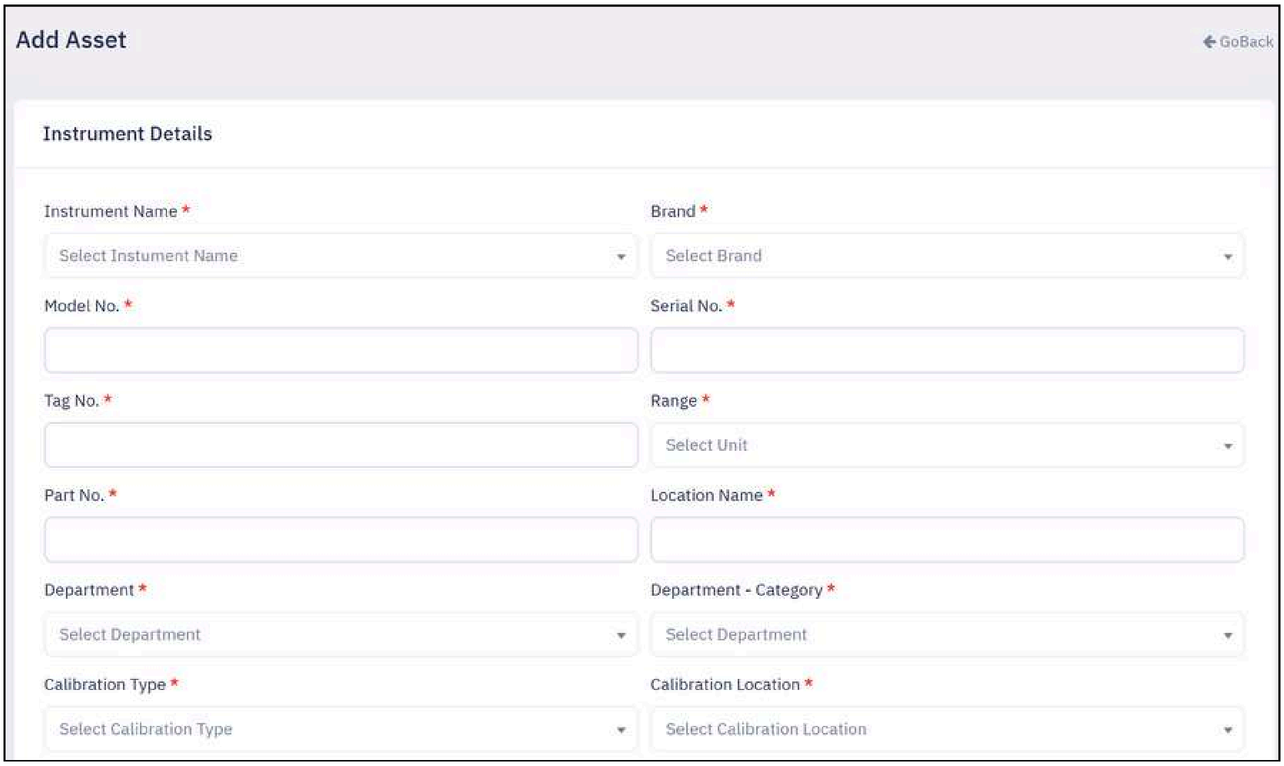
- Allows you to quickly search for assets or apply filters based on criteria such as status, stock, vendor, and more.
- This makes it easier to find specific items or view a filtered list.



8. Active List & Pending List

- Active List: Displays assets that are currently in use or available.
- Pending List: Shows assets that are pending service, approval, or other actions.

3.4.1.2 Adding Asset



1. Instrument Name

- Enter the name or description of the instrument.
  - Example: Digital Multimeter, Pressure Gauge, etc.

2. Model No., Serial No., Tag No., Part No.

- Provide relevant identifiers for the instrument.
  - Model No.: Manufacturer's model number.
  - Serial No.: Unique identifier assigned to the instrument.
  - Tag No.: Internal tracking number or label used by your organization.
  - Part No.: Manufacturer's part number, if applicable.

3. Range

- Specify the instrument's measurement range or operational capability.
  - Example: 0-1000 psi, 0-500V, etc.

4. Select Unit

- Choose the appropriate measurement unit for the instrument.
  - Example: psi, V, °C, mm, etc.

5. Location & Department

- Indicate where the instrument is used and which department it is assigned to.
  - Location: Physical location (e.g., Lab 1, Warehouse, Field).
  - Department: Name of the department using the instrument (e.g., Quality Control, Production).

6. Calibration Type & Location

- Select the type of calibration required and where it will take place.
  - Calibration Type: Internal/External Calibration, Onsite Calibration, etc.
  - Calibration Location: In-house lab, vendor facility, etc.

7. Save/Cancel

  - Save: Click this to save the entered information.
  - Cancel: Click this to exit without saving any changes.

Calibration List

Due List | Asset

Overdue

ALL	INSTRUMENT NAME	SERIAL NO.	MODEL NO.	TAG NO.	BRAND	RANGE
✓	DIGITAL TURBINE TEMPERATURE TEST SET	5835	101-00901	XSP0299	BARFIELD	(0~1000)/°C
✓	DIGITAL TURBINE TEMPERATURE TEST SET	5273	101-00901	XSP0065	BARFIELD	(0~1000)/°C
✓	OVEN THERMOMETER	-	-	XSP1804	BRANNAN	(0~450)/°F
✓	TEMPERATURE & HUMIDITY DATALOGGER	17115620	BG-LOG-TempRH	-	BLUE GIZMO	(MULTIRANGE)/.
✓	TEMPERATURE & HUMIDITY DATALOGGER	17025625	BG-LOG-TempRH	XSP0111	BLUE GIZMO	(MULTIRANGE)/.

4.1. Calibration List

- Displays all ongoing or scheduled calibration tasks.
  - You can track the status of current calibrations and ensure timely completion.

4.1.1 Due List

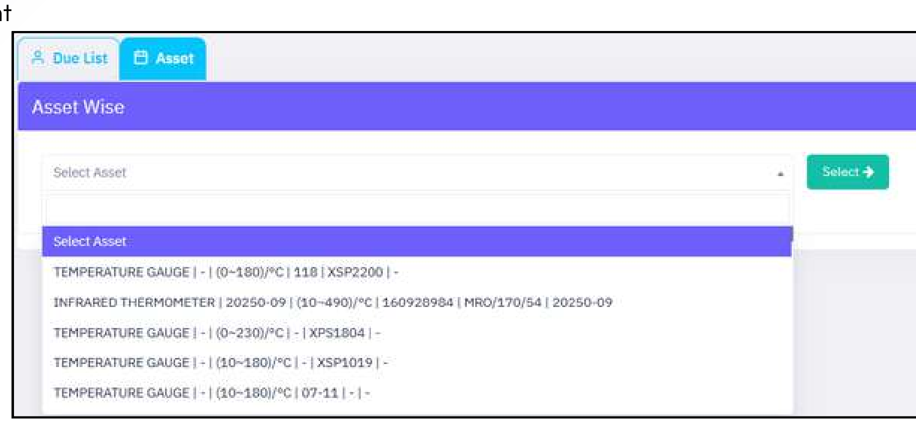
- Shows items that are approaching their calibration due date.
  - This helps you prioritize tasks and prevent overdue calibrations.

4.1.2 Overdue

- Lists items whose calibration is past the due date.
  - This section is critical for identifying delayed tasks and ensuring compliance with standards.

4.2.1 Select Asset

- Use the dropdown menu to choose the asset you want to view calibration details for.
  - The dropdown shows a list of available assets, including:
    - Instrument Name: Name of the instrument or equipment.
    - Range: Measurement range of the instrument.
    - Serial No.: Unique serial number assigned to the instrument.
    - Model No.: Manufacturer's model number.
    - Tag No.: Internal tag number for tracking purposes.



4.2.2 Select

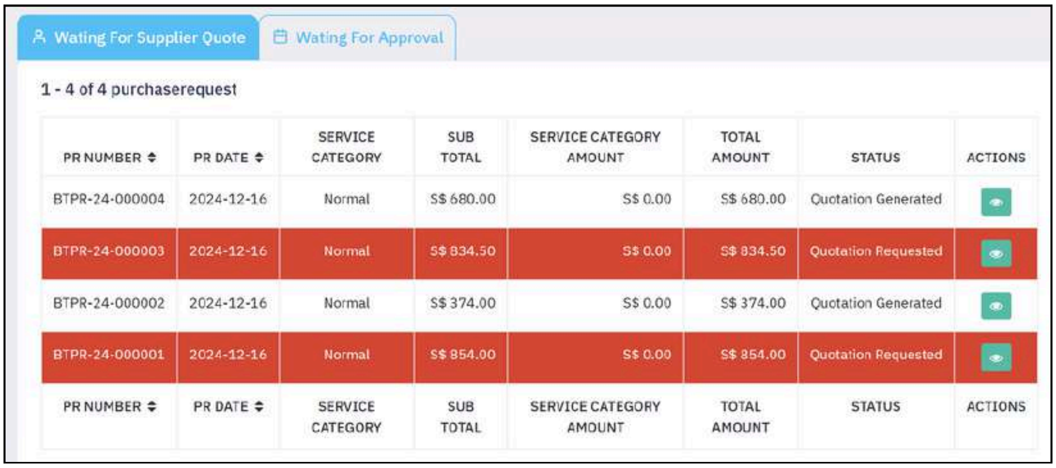
- Once you have chosen an asset from the dropdown menu, click the Select button to view its detailed calibration information.
  - This action retrieves and displays relevant calibration tasks for the selected asset.

4.2.3 Reset

- If you need to clear the current selection and start over, click the Reset button.
  - This clears the selected asset and allows you to make a new selection.

Step	Description	Scenario
4.3.1 Accessing the Calibration Module	Navigate to the Calibration section in the main navigation bar.	Ahmad, a technician, logs into CalPortal to check which instruments are due for calibration. He navigates to the Calibration Module via the main navigation bar to view the list of assigned calibration tasks.
4.3.2 Viewing Calibration Tasks	Check the Calibration List for tasks assigned to you or your department. Identify items marked as Due or Overdue.	Priya, a department head, wants to review the status of pending calibrations. She opens the Calibration List and filters the tasks by her department. She identifies two items marked as Overdue and assigns them for urgent action.
4.3.3 Tracking Calibration History	Use the search bar or filters to view historical data and previous calibration records.	Arif, an auditor, needs to review the calibration history of a specific instrument for compliance purposes. He uses the Search Bar in CalPortal, enters the instrument’s tag number, and retrieves a complete record of past calibrations, including certificates and approval statuses.

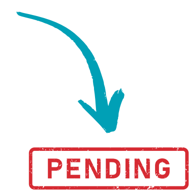
5. Procurement and Vendor Management



Wating For Supplier Quote | Wating For Approval

1 - 4 of 4 purchaserequest

PR NUMBER	PR DATE	SERVICE CATEGORY	SUB TOTAL	SERVICE CATEGORY AMOUNT	TOTAL AMOUNT	STATUS	ACTIONS
BTPR-24-000004	2024-12-16	Normal	S$ 680.00	S$ 0.00	S$ 680.00	Quotation Generated	
BTPR-24-000003	2024-12-16	Normal	S$ 834.50	S$ 0.00	S$ 834.50	Quotation Requested	
BTPR-24-000002	2024-12-16	Normal	S$ 374.00	S$ 0.00	S$ 374.00	Quotation Generated	
BTPR-24-000001	2024-12-16	Normal	S$ 854.00	S$ 0.00	S$ 854.00	Quotation Requested	
PR NUMBER	PR DATE	SERVICE CATEGORY	SUB TOTAL	SERVICE CATEGORY AMOUNT	TOTAL AMOUNT	STATUS	ACTIONS



5.1 Purchase Request Content

- Purchase requests (PRs) can be created for new calibration instruments or replacement parts. To initiate a PR:
  a. Click New Purchase Request.
  b. Enter the following information:
     i. Item description
     ii. Quantity
     iii. Required date

5.2 Generating RFQ/PR

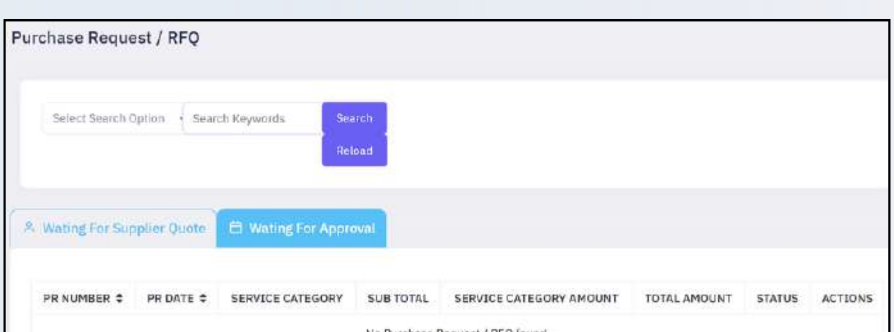
- Navigate to the RFQ/PR section.
  a. Select a purchase request.
  b. Click Generate RFQ to send a request for quotation to vendors.
  c. Once quotes are received, select the best option and click Generate PR.

5.3 Purchase Orders

a. Purchase orders (POs) are generated from approved PRs.
b. Use the Orders tab to view all POs.

5.4 Viewing Detailed Purchase Order Information

a. Click on a PO to view:
   i. Vendor details
   ii. Order items
   iii. Delivery status



Purchase Request / RFQ

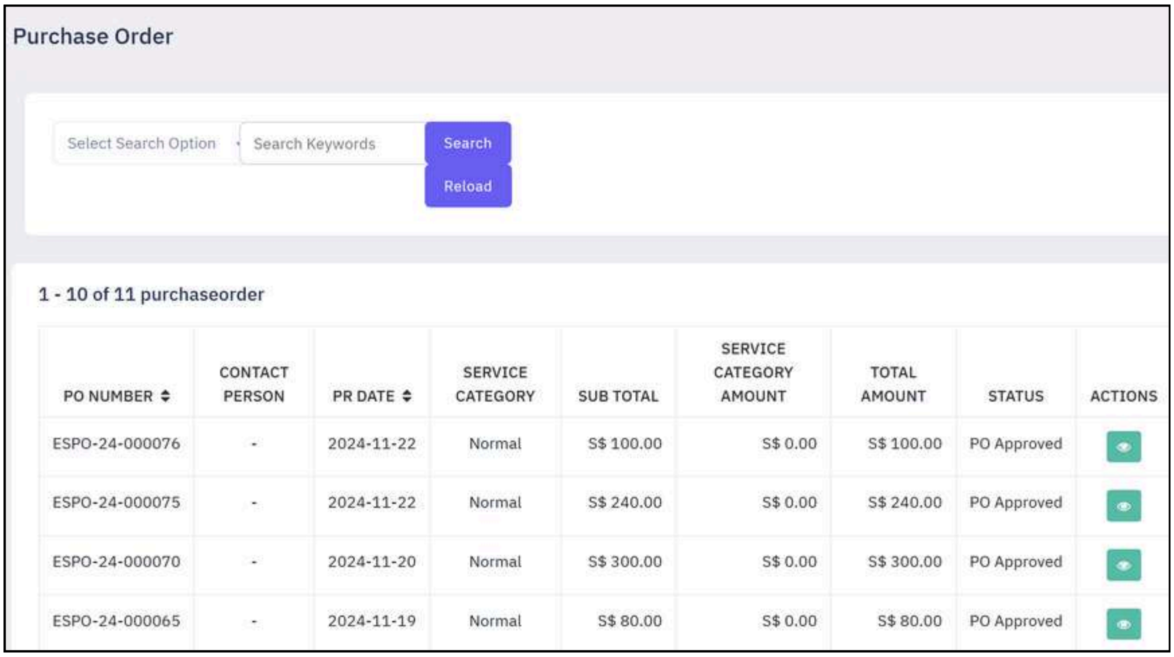
Select Search Option | Search Keywords | Search | Reload

Wating For Supplier Quote | Wating For Approval

PR NUMBER	PR DATE	SERVICE CATEGORY	SUB TOTAL	SERVICE CATEGORY AMOUNT	TOTAL AMOUNT	STATUS	ACTIONS
No Purchase Request / RFQ found.							

This section outlines purchase requests and RFQs (Request for Quotation). The "Waiting for Approval" tab lists purchase requests that require approval before proceeding to subsequent stages.

5.5 Purchase Order Guide



Purchase Order

Select Search Option | Search Keywords | Search | Reload

1 - 10 of 11 purchaseorder

PO NUMBER	CONTACT PERSON	PR DATE	SERVICE CATEGORY	SUB TOTAL	SERVICE CATEGORY AMOUNT	TOTAL AMOUNT	STATUS	ACTIONS
ESPO-24-000076	-	2024-11-22	Normal	S$ 100.00	S$ 0.00	S$ 100.00	PO Approved	
ESPO-24-000075	-	2024-11-22	Normal	S$ 240.00	S$ 0.00	S$ 240.00	PO Approved	
ESPO-24-000070	-	2024-11-20	Normal	S$ 300.00	S$ 0.00	S$ 300.00	PO Approved	
ESPO-24-000065	-	2024-11-19	Normal	S$ 80.00	S$ 0.00	S$ 80.00	PO Approved	

1. PO Number
- A unique identifier assigned to each Purchase Order (PO).
  - Useful for tracking and referencing specific orders during procurement.

2. Contact Person
- The individual responsible for handling the purchase order.
  - This person serves as the primary point of contact for any inquiries or follow-ups.

3. PR Date
- The date when the Purchase Request (PR) associated with the purchase order was created.
  - Helps maintain a timeline of procurement activities.

4. Service Category
- Indicates the type of services or goods being procured.
  - Examples:
    - Calibration
    - Maintenance
    - Spare Parts

5. Sub Total
- Displays the total cost of the items or services before applying taxes or additional charges.

6. Service Category Amount
- Shows a detailed breakdown of the amount spent on each service category.
  - This helps in analyzing expenses by category.

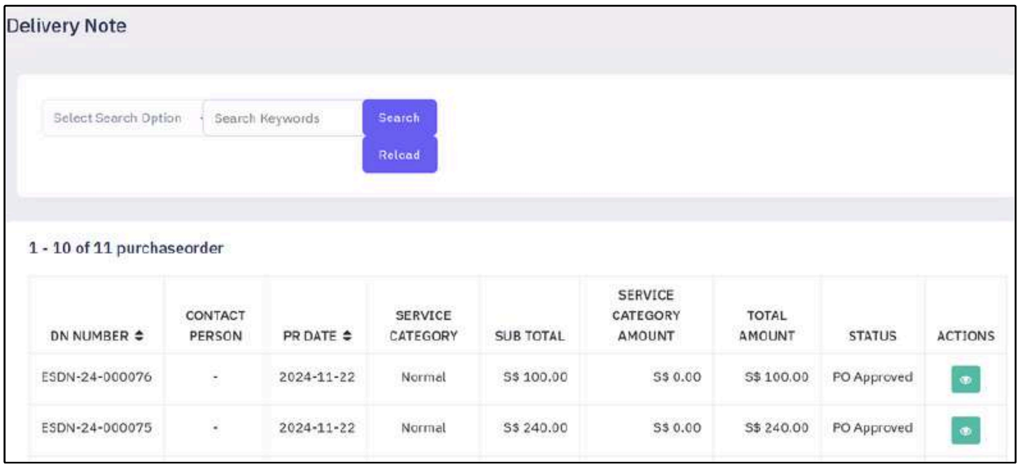
7. Total Amount
- The final total cost of the purchase order, including all applicable taxes and charges.

8. Status
- Indicates the current status of the purchase order, such as:
  - Pending: Awaiting approval or further action.
  - Approved: The purchase order has been reviewed and accepted.
  - Completed: The purchase order has been fully processed and closed.

9. Actions
- Provides options to manage the purchase order, including:
  - View Details: Display comprehensive information about the purchase order.
  - Edit: Modify the purchase order, if necessary.
  - Cancel: Cancel the purchase order, if it is no longer required.

10. Detailed Purchase Order Information
- A table displaying in-depth information about each purchase order, including:
  - Itemized lists of services or goods.
  - Quantities, unit prices, and total costs.
  - Delivery timelines and supplier details.
  - This table helps users track, review, and analyze procurement activities effectively.

This guide ensures that users can easily manage their purchase orders, track their status, and make informed procurement decisions.


Delivery Note

Select Search Option | Search Keywords | Search | Reload

1 - 10 of 11 purchaseorder

DN NUMBER	CONTACT PERSON	PR DATE	SERVICE CATEGORY	SUB TOTAL	SERVICE CATEGORY AMOUNT	TOTAL AMOUNT	STATUS	ACTIONS
ESDN-24-000076	-	2024-11-22	Normal	S$ 100.00	S$ 0.00	S$ 100.00	PO Approved	
ESDN-24-000075	-	2024-11-22	Normal	S$ 240.00	S$ 0.00	S$ 240.00	PO Approved	

6. Delivery and Verification

6.1 Delivery Note

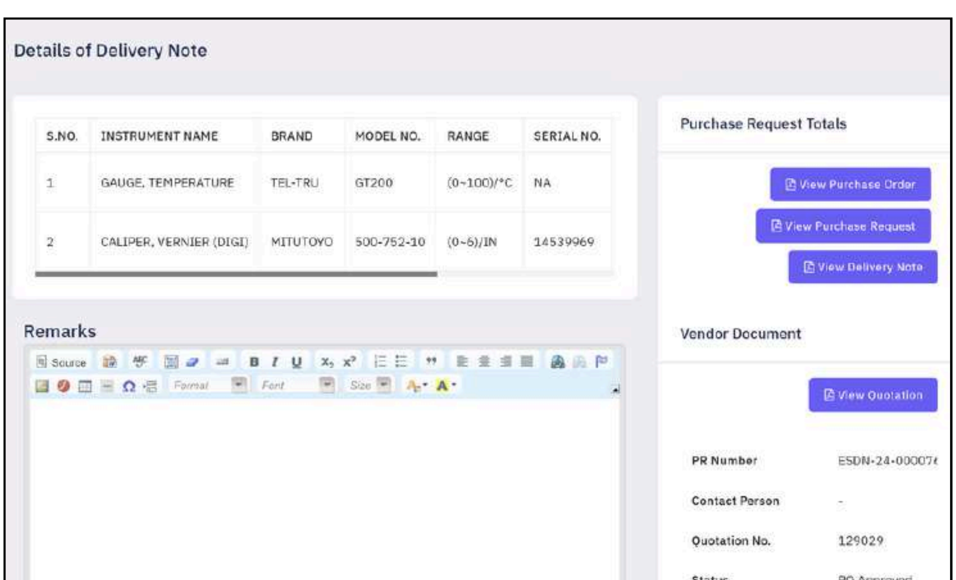
a. A delivery note is generated upon receipt of ordered items.
   i. To create a delivery note:
   ii. Go to Delivery and click New Note.
   iii. Enter the received item details.
   iv. Click Save.

6.2 Verification Request Fields

a. Verification requests ensure received items meet specifications. Fields include:
   i. Item description
   ii. Quantity received
   iii. Inspection results

6.3 Received Note (Including Completed Calibration Report Viewing)

a. Once items are verified, generate a received note.
b. Completed calibration reports can be viewed by clicking View Report in the received note.


Details of Delivery Note

S.NO.	INSTRUMENT NAME	BRAND	MODEL NO.	RANGE	SERIAL NO.
1	GAUGE, TEMPERATURE	TEL-TRU	GT200	(0~100)/°C	NA
2	CALIPER, VERNIER (DIGI)	MITUTOYO	500-752-10	(0~6)/IN	14539969

This guide ensures clarity in managing and verifying delivery notes, enabling smooth operations and accurate record-keeping.

6.4 Delivery Note Guide

1. DN Number
- A unique identifier assigned to each delivery note.
    - This helps in tracking and referencing specific deliveries.

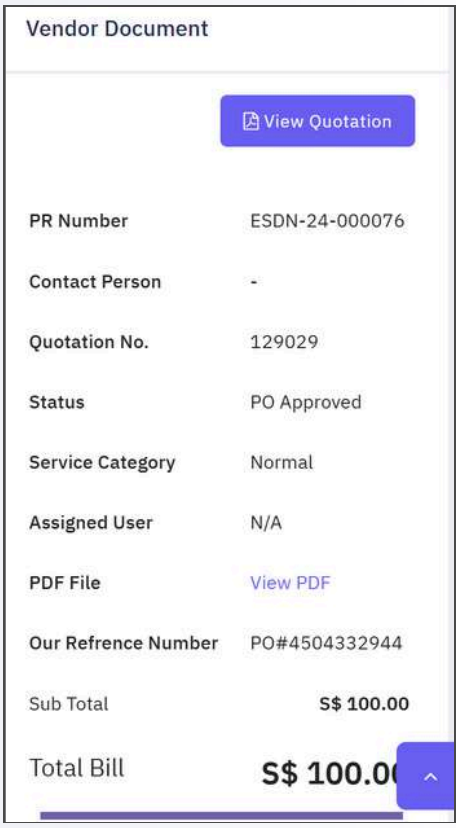
2. Contact Person
- Displays the name of the individual associated with the delivery.
    - This person is responsible for overseeing or confirming the delivery process.

3. PR Date
- Indicates the date when the Purchase Request (PR) was created.
    - Useful for verifying the timeline of the procurement process.

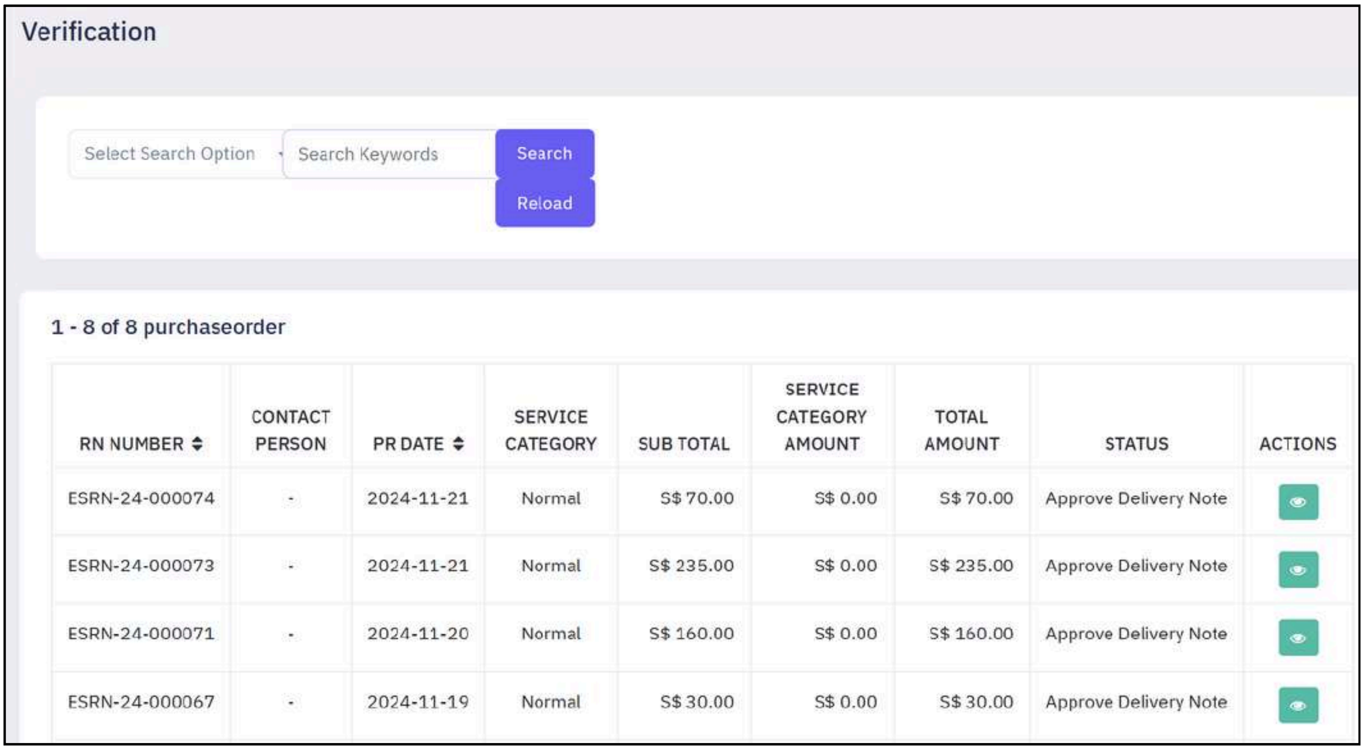
4. Service Category
- Lists the types of services or items delivered (e.g., Calibration, Repair, Maintenance).
    - Helps in categorizing and tracking the nature of the delivered services.

5. Total Amount
- Shows the total cost of the services or items listed in the delivery note.
    - Includes all charges related to the delivery.

6. Actions
- Provides options to perform tasks such as:
    - Edit: Modify the details of the delivery note.
        - Verify: Confirm receipt and accuracy of the delivered items or services.



6.5 Verification Request Fields



RN NUMBER	CONTACT PERSON	PR DATE	SERVICE CATEGORY	SUB TOTAL	SERVICE CATEGORY AMOUNT	TOTAL AMOUNT	STATUS	ACTIONS
ESRN-24-000074	-	2024-11-21	Normal	S$ 70.00	S$ 0.00	S$ 70.00	Approve Delivery Note	
ESRN-24-000073	-	2024-11-21	Normal	S$ 235.00	S$ 0.00	S$ 235.00	Approve Delivery Note	
ESRN-24-000071	-	2024-11-20	Normal	S$ 160.00	S$ 0.00	S$ 160.00	Approve Delivery Note	
ESRN-24-000067	-	2024-11-19	Normal	S$ 30.00	S$ 0.00	S$ 30.00	Approve Delivery Note	

1. RN Number
- A unique identifier assigned to each verification request.
  - This helps in tracking and referencing the specific request throughout the process.

2. Contact Person
- The individual associated with the verification request.
  - This person handles communication and follow-up related to the request.

3. PR Date
- Indicates the date when the Purchase Request (PR) related to the verification was created.
  - Useful for maintaining a timeline of procurement and verification activities.

4. Service Category
- Specifies the type of service being verified (e.g., Calibration, Maintenance, Repair).
  - Helps in categorizing the request for streamlined processing.

5. Sub Total
- Displays the subtotal cost of the verification request before taxes or additional charges.

6. Service Category Amount
- Shows the individual amounts associated with each service category.
  - This helps in breaking down and understanding the total cost by service type.

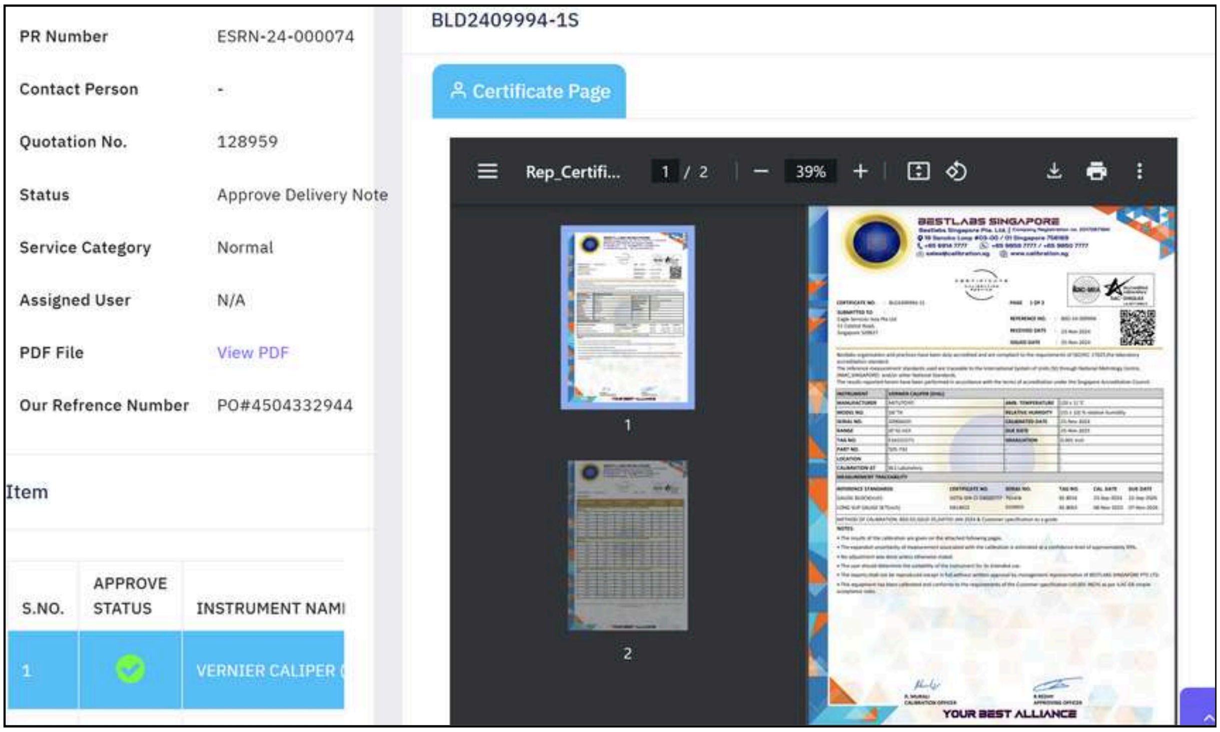
7. Total Amount
- Shows the final total cost of the verification request, including all applicable charges.

8. Status
- Displays the current status of the verification request, such as:
  - Pending Approval: Waiting for review and approval.
  - Approved: Request has been reviewed and accepted.
  - Rejected: Request was reviewed but not approved.

9. Actions
- Lists the possible actions that can be performed on the verification request, such as:
  - Approve: Accept and confirm the verification request.
  - Reject: Decline the verification request with possible feedback.

This guide simplifies the understanding and management of verification requests, ensuring accurate handling and clear communication throughout the process.

6.6 Received Note Guide



This step-by-step guide explains how to manage received notes and view calibration reports for completed calibration services:

1. PO Number

- A unique identifier for the Purchase Order (PO) linked to the received items or services.
  - This helps in tracking and matching the received items with the initial order.

2. Completion Status

- Indicates whether the order is:
  - Partially Completed: Only a portion of the items or services has been received.
  - Fully Completed: All items or services in the order have been delivered.

3. Actions

- Provides options to manage the received note and view completed calibration reports:
  - View Details: Displays the full information of the received note, including item descriptions and quantities.
  - Edit: Modify the received note if necessary.
  - Verify: Confirm that the received items or services match the purchase order.
  - Close: Finalize and close the received note after completing verification.

- View Completed Calibration Report:
  - Directly access calibration reports for instruments that have undergone calibration.
  - The calibration report typically includes:
    - Instrument Details: Name, serial number, model, and tag number.
    - Calibration Date: Date when the calibration was completed.
    - Next Due Date: Scheduled date for the next calibration.
    - Technician Information: Name of the person or organization that performed the calibration.
    - Calibration Results: Pass/fail status, measurement range, and any deviations noted.
    - Calibration Certificate: A downloadable or printable version of the calibration certificate for compliance and audit purposes.

PR NUMBER	CONTACT PERSON	PR DATE	SERVICE CATEGORY	SUB TOTAL	SERVICE CATEGORY AMOUNT	TOTAL AMOUNT
ESPR-25-000005	-	2025-01-10	Normal	S$ 1.00	S$ 0.00	S$ 1.00
ESPR-25-000004	-	2025-01-10	Normal	S$ 641.30	S$ 0.00	S$ 641.30
ESPR-25-000003	-	2025-01-07	Normal	S$ 424.00		
ESPR-25-000002	-	2025-01-03	Normal	S$ 2,256.50		

TAL	SERVICE CATEGORY AMOUNT	TOTAL AMOUNT	STATUS	BESTLABS DOCUMENTS (VENDOR) QUOTATION	SO	CERTIFICATE
.00	S$ 0.00	S$ 230.00	Completed	BQS-24-010767	BSO-24-010051	
.00	S$ 0.00	S$ 80.00	Completed	BQS-24-010645	BSO-24-009991	
.00	S$ 0.00	S$ 30.00	Completed	BQS-24-010644	BSO-24-009992	
.00	S$ 0.00	S$ 40.00	Completed	BQS-24-010602	BSO-24-009997	
.00	S$ 0.00	S$ 190.00	Completed	BQS-24-010598	BSO-24-009840	

1. **Tracking System**
- Displays a list of documents being tracked within the system.
  - This includes purchase requests (PR), invoices, or verification requests.

2. Select Search Option
- Allows you to filter the document list by different criteria, such as:
  - PR Number
  - Contact Person
  - Service Category
  - Status

3. Search Keywords
- Enter specific keywords to narrow down the list further.
  - For example, type a PR Number or a Contact Person's Name to find a document quickly.

4. Search
- Click this button to start the search based on the selected filters and entered keywords.

5. Reload
- Refreshes the list of tracked documents, showing the latest updates or changes.
  - Document Status
    - i. Processing
    - ii. Displays documents currently in progress.
    - iii. These may be under review, awaiting approval, or undergoing workflow steps before completion.
  - Completed
    - i. Shows documents that have been finalized and approved.
    - ii. Completed documents are ready for record-keeping or further action if required.

6.7.1 Tracking System List Guide

	OUR DOCUMENTS				
CERTIFICATE	PR	RFQ	PO	DELIVERY NOTE	RECEIVED NOTE
	ESPR-24-000077	ESRFQ-24-000077	ESPO-24-000077	ESDN-24-000077	ESRN-24-000077
	ESPR-24-000069	ESRFQ-24-000069	ESPO-24-000069	ESDN-24-000069	ESRN-24-000069
	ESPR-24-000068	ESRFQ-24-000068	ESPO-24-000068	ESDN-24-000068	ESRN-24-000068
	ESPR-24-000066	ESRFQ-24-000066	ESPO-24-000066	ESDN-24-000066	ESRN-24-000066
	ESPR-24-000064	ESRFQ-24-000064	ESPO-24-000064	ESDN-24-000064	ESRN-24-000064
	ESPR-24-000063	ESRFQ-24-000063	ESPO-24-000063	ESDN-24-000063	ESRN-24-000063

Document List Guide

This section provides detailed information about each document in the list:

1. PR Number
- A unique identifier assigned to the purchase request or document.
  - Helps in tracking and referencing specific documents.

2. Contact Person
- The person associated with the document.
  - This individual may be responsible for initiating or approving the request.

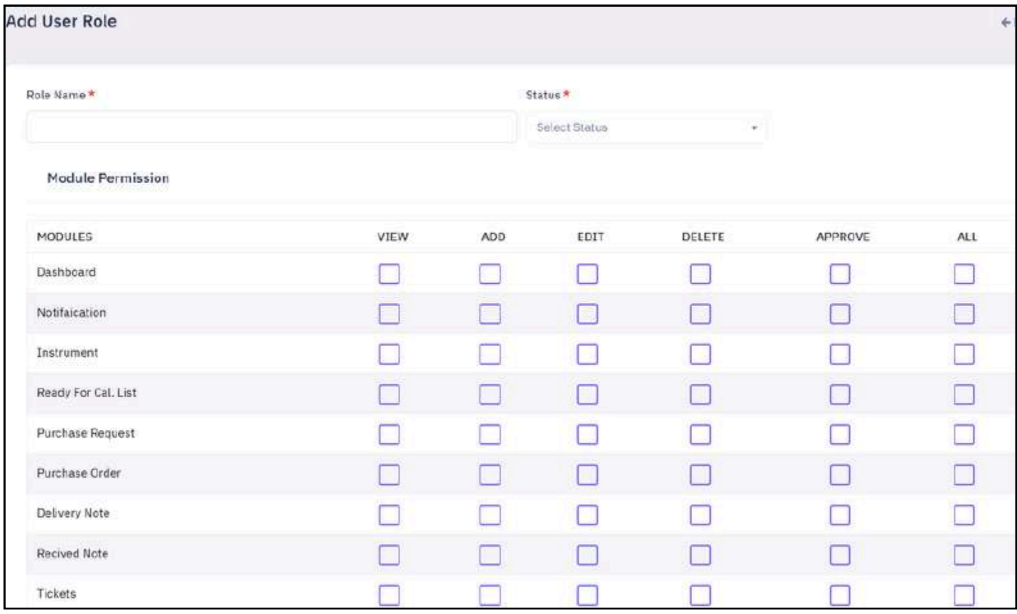
3. PR Date
- The date when the Purchase Request (PR) or document was created.
  - Useful for maintaining a timeline of requests and actions.

4. Service Category
- Indicates the category of service related to the document, such as:
  - Calibration
  - Maintenance
  - Repair

5. Sub Total
- Shows the subtotal cost before taxes or additional charges.

6. Service Category Amount
- Displays the individual amounts for each service category listed in the document.

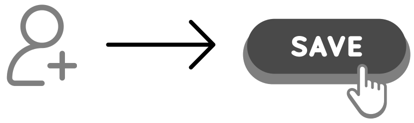
7. Total Amount
- The final total cost of the document, including all applicable charges.



7.1 Roles Management

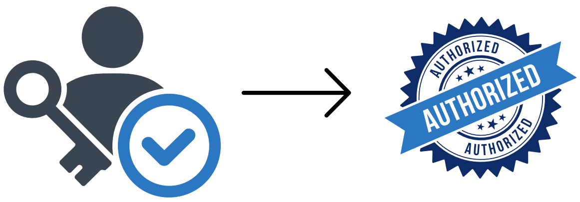
7.1.1 Creating New Roles

1. Go to Administration > Roles.
2. Click New Role.
3. Enter the role name
   (e.g., Technician, Manager).
   a. Select permissions for each module.
   b. Click Save.



7.1.2 Assigning Module Permissions

1. Select a role from the list.
2. Check/uncheck boxes to grant or revoke module access.
3. Click Update.



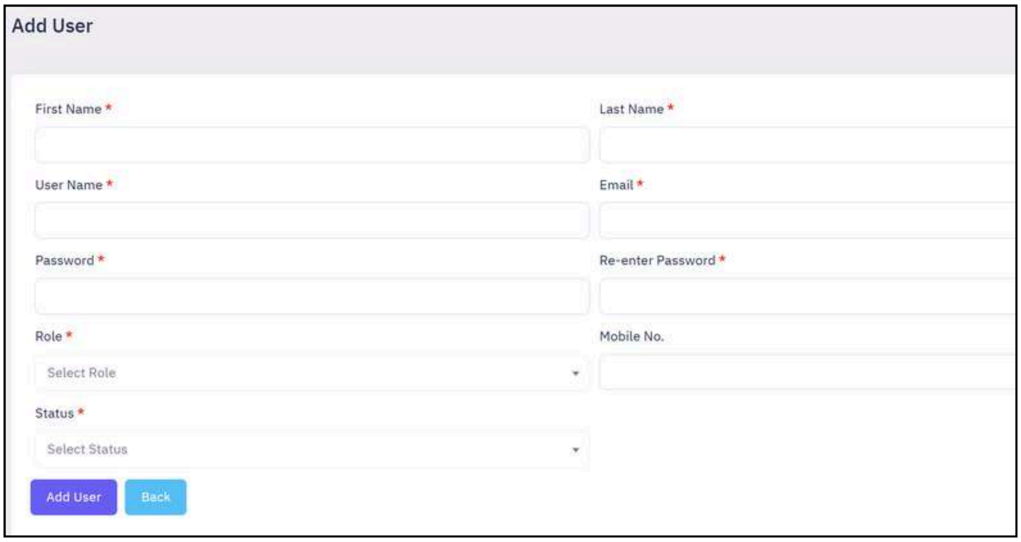
7.2 User Management

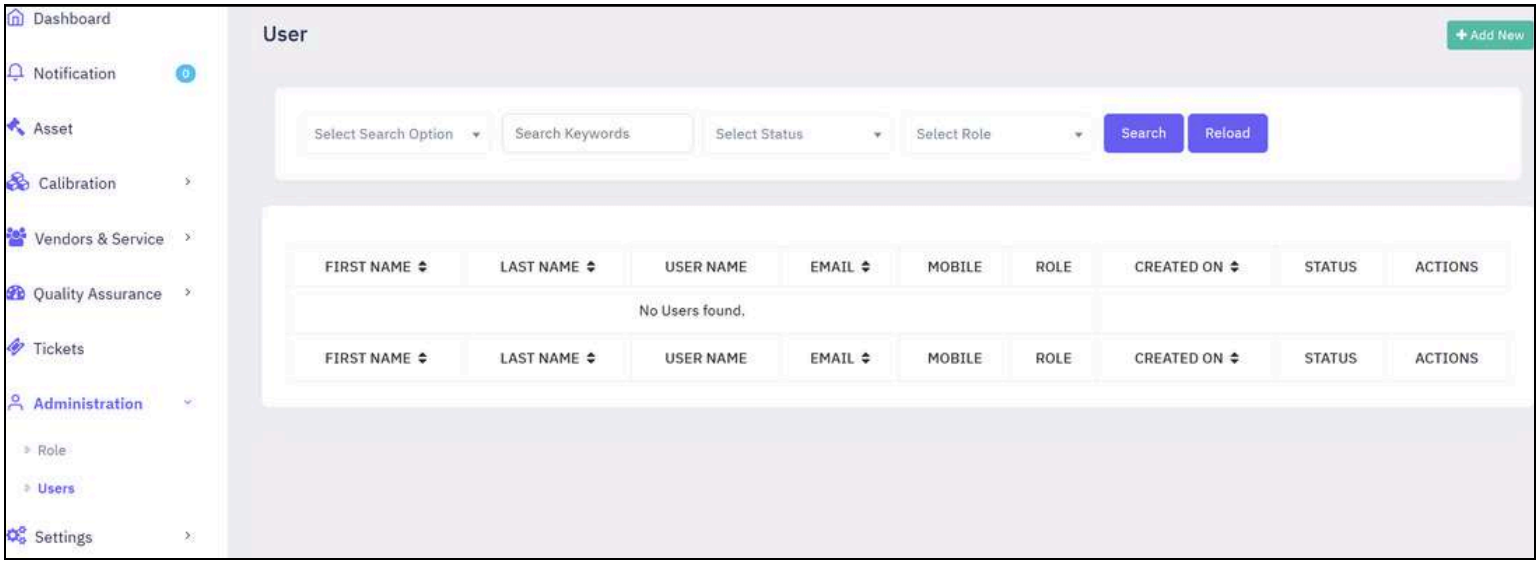
7.2.1 Viewing User Details

- View user profiles by clicking on the user name.

7.2.2 Adding New Users

1. Click New User.
2. Enter user details, including:
   - Full name
   - Email address
   - Assigned role
3. Click Save to add the user.





This guide explains the key features of the Administration section, which helps manage roles and users within the system.

1. Roles

- Role Name & Status
  - Displays the name of each role and its current status (active/inactive).
  - Roles represent different access levels and responsibilities within the system
    - (e.g., Admin, Supervisor, Technician).

- Module Permissions
  - Assign specific rights to each role for different modules:
    - View: Allows the user to see content but not make changes.
    - Edit: Grants permission to modify content.
    - Delete: Enables removal of records or data.
    - Approval: Authorizes the user to approve actions or processes
      - (e.g., purchase requests, verification requests).

2. Users

- User Details
  - Lists essential information about each user, including:
    - Name: The full name of the user.
    - Email: Contact email for communication and login.
    - Phone: User’s contact number.
    - Role: The assigned role that defines the user’s access level and permissions.
    - Status: Indicates whether the user account is active or inactive.

- Add New User
  - Allows administrators to create new user accounts.
    - Enter user details such as name, email, phone, and assign an appropriate role.
    - Set the initial status (active/inactive) of the user account.
    - Ensure the new user receives the necessary permissions based on their role.

Step	Description	Scenario
7.4.1 Roles Management: Creating New Roles	Navigate to the Administration section and click on 'Roles'. Enter a new role name, set the status (Active/Inactive), and click 'Save'.	Siti, the system administrator, needs to create a new role for the logistics team. She navigates to the 'Roles' section, enters 'Logistics Supervisor' as the role name, and activates the role.
7.4.2 Roles Management: Assigning Module Permissions	After creating a role, assign specific permissions by checking boxes for View, Add, Edit, Delete, and Approve across modules.	Ahmad, an administrator, assigns permissions to the newly created 'Logistics Supervisor' role. He checks 'View' and 'Approve' for the Calibration module and saves the changes.
7.4.3 User Management: Viewing User Details	Go to the Administration section and click on 'Users'. View detailed information, such as name, email, phone, role, and status of each user.	Priya, a supervisor, wants to check the contact details of a specific user. She navigates to the 'Users' section, searches for the user by name, and views the details.
7.4.4 User Management: Adding New Users	In the Administration section, click 'Add New User'. Enter the user's details, assign a role, and set the status. Click 'Save' to create the new user.	Ramesh, a system administrator, needs to add a new technician to the system. He clicks 'Add New User', enters the technician's name, email, and phone number, assigns the role 'Technician', and saves the new user.

8. General System Management Guide

This guide explains various sections of the system for managing roles, users, departments, categories, vendors, brands, units, ranges, checklists, and assets.

1. Roles Management

- This section allows you to create and manage user roles within the system.
  - Fields and Actions:
    - Role Name: Enter the name of the role (required).
    - Status: Select the activation status (Active/Inactive).
    - Module Permissions: Assign permissions across modules by selecting options such as View, Add, Edit, Delete, and Approve.
    - Save Role: Click to save and apply role configurations.
    - Back: Cancel changes and return to the previous screen.

2. User Management

- This section displays a list of users and their details.
  - Fields and Actions:
    - User Details: Displays user information (Name, Email, Phone, Role, and Status).
    - Add New User: Create new user accounts by entering user information and assigning a role.

3. Department Management

- Allows you to create and manage departments within the system.
  - Fields and Actions:
    - Details: Lists department name, head, status, and remarks.
    - Add Department: Create a new department by entering required details.

4. Contact Person Management

- Manage contact persons associated with various tasks.
  - Fields and Actions:
    - Details: Displays contact person's name, email, phone, and status.
    - Add Contact Person: Add new contact persons by entering relevant details.

5. Category Management

- Manage categories for classifying items or tasks.
  - Fields and Actions:
    - Details: Lists category name, department, and status.
    - Add Category: Create new categories by entering required details.

6. Instrument Management

- Allows management of instruments used within the organization.
  - Fields and Actions:
    - Details: Displays instrument name, status, and available actions.
    - Add Instrument: Add new instruments by filling in required fields.

7. Vendor Management

- Enables efficient tracking and management of vendors.
  - Fields and Actions:
    - Details: Lists vendor name, contact information, and actions.
    - Search & Filtering: Locate vendors quickly using search and filter options.

8. Brand Management

- Manage brands associated with instruments or equipment.
  - Fields and Actions:
    - Details: Displays brand name and status.
    - Add Brand: Enter a new brand name and save it using the Add Brand button.
    - Back: Cancel the action and return to the previous screen.

9. Unit Management

- Define and manage measurement units used in the system.
  - Fields and Actions:
    - Details: Lists unit names and status.
    - Add Unit: Create new units by entering required information.

10. Range Management

- Manage measurement ranges used for instruments.
  - Fields and Actions:
    - Details: Displays range values, units, and status.
    - Add Range: Use this option to add new measurement ranges.
    - Active List: Displays ranges currently in use.
    - Pending List: Displays ranges awaiting updates (e.g., maintenance or calibration).

11. Checklist Management

- Manage and track checklists for various tasks.
  - Fields and Actions:
    - Create Custom Fields: Add specific requirements to checklist templates.
    - Track Progress: Ensure systematic completion of all checklist items.

12. Asset Management

- Manage assets efficiently within the system.
  - Features:
    - Asset Management Interface: Designed to track and oversee laboratory or industrial equipment.
    - Customizable Asset Fields: Use the Other Field Label feature to add custom fields for specific needs beyond standard system fields.

This comprehensive guide ensures smooth system management by helping users navigate and manage roles, users, departments, vendors, instruments, and more efficiently.

Step	Description	Scenario
8.1.1 Instrument Management: Adding New Instruments	Navigate to the Instrument section, click 'Add Instrument', enter instrument details such as name, serial number, and model number. Set the status and click 'Save'.	Asha, a technician, needs to add a new instrument to the system. She navigates to the Instrument section, clicks 'Add Instrument', fills in the necessary details, and saves the entry.
8.1.2 Instrument Management: Viewing and Updating Instruments	In the Instrument section, view the list of instruments. To update details, select an instrument, make changes, and save the updates.	Ravi, an engineer, wants to update the status of an instrument that has been decommissioned. He searches for the instrument, changes its status to 'Inactive', and saves the changes.
8.1.3 Vendor Management: Adding New Vendors	Go to the Vendor section, click 'Add Vendor', enter the vendor’s name, contact details, and address. Click 'Save' to add the new vendor.	Farid, a procurement officer, needs to add a new vendor to the system. He navigates to the Vendor section, enters the vendor’s details, and saves the new vendor.
8.1.4 Vendor Management: Searching and Filtering Vendors	In the Vendor section, use the search bar or filters to locate vendors by name, contact person, or status.	Priya, a supervisor, is searching for a specific vendor to request a quotation. She uses the search bar in the Vendor section and quickly finds the vendor.
8.1.5 Brand Management: Adding New Brands	Navigate to the Brand section, click 'Add Brand', enter the brand name, and click 'Save' to add it to the system.	Ahmad, a store manager, needs to add a new brand of instruments that the company has started using. He goes to the Brand section, clicks 'Add Brand', enters the name, and saves it.
8.1.6 Brand Management: Viewing and Managing Brands	In the Brand section, view the list of existing brands. You can update brand details or deactivate brands as needed.	Siti, a procurement officer, notices that a brand is no longer in use. She navigates to the Brand section, selects the brand, and deactivates it to keep the system up to date.

9. DO's and DON'Ts for CalPortal Users

DO's

1. **Keep Login Credentials Secure**
    - Always keep your username and password confidential.
    - Change your password periodically to enhance security.
2. **Ensure Accurate Data Entry**
    - Double-check all information entered into CalPortal, such as calibration details, purchase requests, and asset records, to ensure accuracy.
3. **Follow Standard Operating Procedures (SOPs)**
    - Use CalPortal in line with your organization's SOPs for calibration and asset management.
    - Complete all required fields when scheduling or logging a calibration task.
4. **Use Filters and Search Tools Efficiently**
    - Utilize the search bar and filters to quickly locate tasks, documents, or assets.
5. **Regularly Track Pending and Overdue Tasks**
    - Frequently check the dashboard for pending and overdue calibration tasks to avoid delays.
6. **Attach Supporting Documents**
    - Always upload necessary supporting documents, such as calibration certificates or vendor quotations, to ensure proper documentation.
7. **Log Out After Use**
    - Always log out of CalPortal after completing your session to prevent unauthorized access.

DON'Ts

1. **Don't Share Your Account Credentials**
    - Never share your username and password with others, even if they are part of your team.
2. **Don't Ignore Notifications and Alerts**
    - Always pay attention to system notifications and alerts regarding pending approvals, overdue tasks, or system updates.
3. **Don't Enter Incomplete Information**
    - Avoid submitting incomplete calibration tasks, purchase requests, or asset records as it may delay approvals or processes.
4. **Don't Attempt Unauthorized Access**
    - Do not attempt to access modules or information for which you do not have permission. Unauthorized access may result in suspension of your account.
5. **Don't Modify Data Without Proper Authorization**
    - Always seek approval before making changes to critical data, such as instrument details or vendor information.
6. **Don't Ignore Scheduled Maintenance Downtime**
    - Plan your tasks around scheduled system maintenance to avoid interruptions.
7. **Don't Use the System for Unrelated Activities**
    - CalPortal is designed for calibration and asset management purposes only. Avoid using it for any unauthorized or unrelated activities.

9.1 Steps for Administrator Users in CalPortal

1. **Login as Administrator:**
   - Use administrator credentials to log in via the login form.
2. **Access Administration Settings:**
   - Navigate to the Administration section in the main navigation bar.
3. **Manage Roles:**
   - Create or edit roles in the Roles tab.
   - Assign permissions to view, edit, delete, approve, or perform all actions for specific modules.
4. **Add or Manage Users:**
   - Go to the Users tab.
   - Click Add New User to create a new account.
   - Assign roles and permissions to the user.
   - Update or deactivate user accounts as needed.
5. **Configure Settings:**
   - Navigate to the Settings section.
   - Manage departments, categories, and units under respective tabs.
   - Add or edit contact persons, vendors, brands, and ranges.
6. **Oversee Calibration Records:**
   - Review calibration lists in the Calibration module.
   - Approve or reject submitted calibration records.
   - Monitor overdue or pending tasks.
7. **Manage Assets:**
   - Access the Asset section.
   - Add new instruments or update existing asset details.
   - Monitor active and pending asset statuses.
8. **Generate Reports:**
   - Use reporting tools to generate insights on calibration performance, overdue tasks, or procurement activities.
9. **Handle Tickets:**
   - Navigate to the Tickets section.
   - Assign or resolve system-related tickets.
   - Track the status and history of issues.
10. **Quality Assurance:**
    - Oversee the Quality Assurance module to ensure compliance with standards.
    - Review and approve related documentation.

9.2 Easy Steps and Guide for New User

This guide provides a simplified overview of key steps for a new user to get started with the system and manage different modules efficiently:

Step 1: Logging In
- Use your credentials (username/email and password) to log in.
- You'll be directed to the Dashboard, where you can see an overview of tasks, documents, and notifications.

Step 2: Navigating the Dashboard
- Dashboard Overview:
  - Tracking System: Displays documents being tracked.
  - Search and Filter: Use search options to quickly find documents by PR number, contact person, or service category.
  - Document Status: Monitor documents in Processing or Completed status.
  - Reload: Refresh the dashboard to get the latest updates.

Step 3: Managing Roles
- Go to the Administration section.
- Create New Role:
  - Enter a role name (e.g., Admin, Supervisor, Technician).
  - Set the status (Active/Inactive).
  - Assign appropriate permissions for modules (View, Add, Edit, Delete, Approve).
  - Click Save Role to apply changes.

Step 4: Adding New Users
- Go to Administration > Users.
- Click Add New User.
  - Enter user details (name, email, phone).
  - Assign a role (previously created).
  - Set the status (Active/Inactive).
  - Click Save to create the user.

Step 5: Managing Departments
- Go to Settings > Departments.
- View existing departments or click Add Department to create a new one.
  - Enter the department name, head, and any remarks.
  - Save the department.

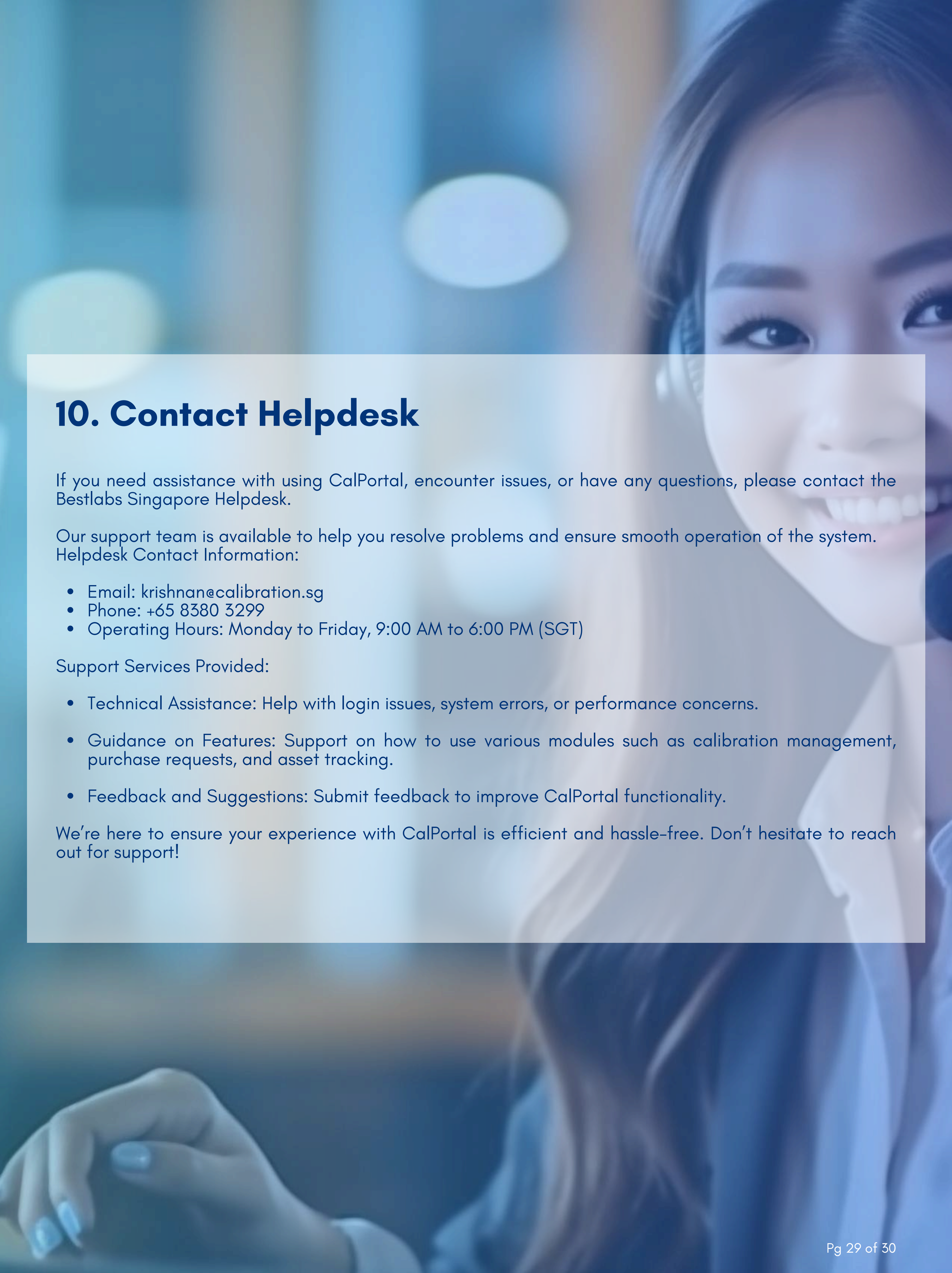
Step 6: Managing Vendors and Categories
- Vendors:
  - Go to Vendors to view, add, or filter vendors.
  - Click Add Vendor to enter vendor name, contact details, and save.
- Categories:
  - Go to Categories to manage classifications for items or services.
  - Click Add Category, enter the category name, assign a department, and save.

Step 7: Adding Instruments
- Go to Instruments.
- Click Add Instrument to enter details such as:
  - Instrument Name, Serial Number, Model Number, Tag Number.
  - Set the status (Active/Inactive).
  - Save the instrument.

Step 8: Managing Units and Ranges
- Units:
  - Go to Units, view existing units or click Add Unit to define new measurement units.
- Ranges:
  - Go to Ranges, view active or pending ranges.
  - Click Add Range to define a new measurement range, unit, and status.

Step 9: Checklist Management
- Go to Checklist to create or manage checklists for tasks.
  - Add specific fields to checklist templates and track their completion.

Step 10: Asset Management
- Go to Assets to manage equipment or instruments.
- Use Customizable Asset Fields to add any specific fields not covered by the default system fields.



10. Contact Helpdesk

If you need assistance with using CalPortal, encounter issues, or have any questions, please contact the Bestlabs Singapore Helpdesk.

Our support team is available to help you resolve problems and ensure smooth operation of the system. Helpdesk Contact Information:

- Email: krishnan@calibration.sg
- Phone: +65 8380 3299
- Operating Hours: Monday to Friday, 9:00 AM to 6:00 PM (SGT)

Support Services Provided:

- Technical Assistance: Help with login issues, system errors, or performance concerns.
- Guidance on Features: Support on how to use various modules such as calibration management, purchase requests, and asset tracking.
- Feedback and Suggestions: Submit feedback to improve CalPortal functionality.

We’re here to ensure your experience with CalPortal is efficient and hassle-free. Don’t hesitate to reach out for support!

11. CalPortal Terms and Conditions

1. Acceptance of Terms
- By accessing and using CalPortal, you agree to comply with these Terms and Conditions. If you do not agree with any part of these terms, you are not authorized to use the platform. These terms form a binding agreement between you (the user) and Bestlabs Singapore regarding the use of CalPortal.

- Bestlabs Singapore reserves the right to update or modify these Terms and Conditions at any time without prior notice. Continued use of CalPortal after such changes constitutes your acceptance of the revised terms.

2. User Obligations
- Users are required to adhere to the following obligations when using CalPortal:
  - Accurate Information: Ensure that all information entered into the system is accurate and up-to-date.
  - Confidentiality: Maintain the confidentiality of your login credentials. Do not share your credentials with unauthorized individuals.
  - Prohibited Actions: Users must not:
    - Attempt to gain unauthorized access to system data or features.
    - Disrupt the normal operation of the system by introducing malicious software or exploiting vulnerabilities.
    - Use the platform for any illegal or unauthorized activities.
  - Compliance: Users are responsible for ensuring compliance with internal policies and external regulatory requirements related to calibration and asset management.

3. Data Privacy and Security
- Bestlabs Singapore is committed to safeguarding user data and maintaining privacy.
  - Data Handling: All user data, including calibration records, asset information, and personal details, will be handled securely and used only for purposes directly related to the functioning of CalPortal.
  - Access Control: Users will only have access to data and features relevant to their assigned roles.
  - Confidentiality: Bestlabs Singapore will not disclose user data to third parties without consent, except as required by law or for system operation and maintenance.
  - For more details, please refer to our Privacy Policy.

4. Intellectual Property Rights
- Ownership: CalPortal, including its software, interface design, features, and all related intellectual property, is owned by Bestlabs Singapore.
- License: Users are granted a limited, non-exclusive, non-transferable license to use CalPortal for internal business purposes only.
- Restrictions: Users may not copy, modify, distribute, or reverse-engineer any part of CalPortal without prior written consent from Bestlabs Singapore.
- Unauthorized use of CalPortal or its intellectual property is strictly prohibited and may result in legal action.

5. Limitation of Liability
- No Warranty: CalPortal is provided on an "as-is" basis without any warranties, either express or implied. Bestlabs Singapore does not guarantee uninterrupted or error-free operation of the platform.
- Liability Exclusion: Bestlabs Singapore will not be liable for any direct, indirect, incidental, or consequential damages arising from the use or inability to use CalPortal, including but not limited to data loss, business interruption, or financial loss.
- User Responsibility: Users are responsible for ensuring data accuracy and maintaining appropriate backups of critical information.

6. Governing Law and Jurisdiction
- These Terms and Conditions are governed by the laws of Singapore. Any disputes arising from or related to the use of CalPortal will be subject to the exclusive jurisdiction of the courts in Singapore.

By using CalPortal, you acknowledge that you have read, understood, and agreed to abide by these Terms and Conditions. If you have any questions, please contact the Bestlabs Singapore Helpdesk for clarification.