

User Guides Index

Role-specific user guides for Operations Tools. Each guide covers all features available to that role.

Available Guides

USER Role Guide

For: All users with USER role **Access:** User App only

Features Covered:

- ⌚ Time Tracking - Record work hours
- 🔗 Links & Resources - Access documentation
- 👤 Profile Management - Account settings
- 🐛 Bug Reporting - Report issues

Audience: General users, team members, contributors

QA Role Guide

For: Quality assurance team members **Access:** User App + QA App (ports 3001-3002)

Includes USER features plus:

- 📋 Records Management - View and analyze records
- 🔍 Similarity Search - Find related content
- 📈 Top/Bottom 10 Review - Quality analysis
- 🏆 Top Prompts Analysis - Best practice identification
- ✅ Alignment Comparison - AI guideline evaluation

Audience: QA analysts, quality reviewers, content evaluators

CORE Role Guide

For: Core team members with scoring/review responsibilities **Access:** User App + QA App + Core App (ports 3001-3003)

Includes USER + QA features plus:

-  Likert Scoring - Rate records on dimensions
-  Candidate Review - Evaluate submissions
-  My Assignments - Manage work queue
-  Review Decisions - Make final determinations

Audience: Scorers, reviewers, evaluators, decision-makers

FLEET Role Guide

For: Fleet managers and project leads **Access:** User App + QA App + Core App + Fleet App (ports 3001-3004)

Includes USER + QA + CORE features plus:

-  Data Ingestion - Import CSV/API data
-  Project Management - Create and manage projects
-  Analytics Dashboard - Comprehensive insights
-  Bonus Windows Management - Create and track bonuses
-  Activity Over Time - Trend visualization
-  Bug Reports Management - Triage and manage reports

Audience: Project managers, team leads, fleet managers, operations managers

How to Use These Guides

Finding Your Guide

1. **Check your role:** Click profile icon → see your role
2. **Select your guide:** Click the guide matching your role above
3. **Read relevant sections:** Each guide is comprehensive but organized by feature

Guide Structure

All guides follow a consistent structure:

1. **Overview** - Role description and app access
2. **Inherited Features** - Features from lower roles (if applicable)
3. **Primary Features** - Features specific to your role
4. **Workflows** - Daily, weekly, monthly routines
5. **Tips & Best Practices** - Success strategies
6. **Troubleshooting** - Common issues and solutions
7. **Support** - Where to get help

Hierarchical Access

Roles are hierarchical - higher roles inherit all lower role features:

PENDING	→	USER	→	QA	→	CORE	→	FLEET	→	ADMIN
USER	=	User App only								
QA	=	USER + QA App								
CORE	=	USER + QA + Core App								
FLEET	=	USER + QA + CORE + Fleet App								
ADMIN	=	All apps including Admin App								

Example: If you're CORE role, you should read:

1. USER_GUIDE.md (brief overview)

2. QA_GUIDE.md (brief overview)
3. CORE_GUIDE.md (thorough read)

Quick Reference

Need to know how to:

- Record time? → All guides, User App section
 - Review records? → QA Guide or higher
 - Score candidates? → CORE Guide or higher
 - Upload data? → FLEET Guide only
 - Manage users? → ADMIN Guide (not included here)
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Getting Help

In-Guide Help

Each guide includes:

- Step-by-step instructions with screenshots (where applicable)
- Best practices and tips
- Troubleshooting sections
- FAQs specific to that role

Additional Resources

General Documentation:

- [Complete Documentation Index](#) - All documentation
- [API Reference](#) - Technical specs
- [Database Schema](#) - Data structure

Architecture Docs:

- [System Overview](#) - Tech stack
- [App Navigation Guide](#) - Feature locations

Setup & Operations:

- [Local Development](#) - Dev setup
- [Production Setup](#) - Deployment
- [Testing Guide](#) - Running tests

Support Channels

For technical issues:

- Use the bug reporting feature (available in all apps)
- Provide detailed steps to reproduce
- Include screenshots if possible

For role/permission questions:

- Contact your manager
- Reference your user guide
- Request role change if needed

For feature requests:

- Discuss with manager first
 - Submit via bug report (mark as "Feature Request")
 - Provide business justification
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Guide Maintenance

Document Versions

All guides are version-controlled:

- **Version 1.0** (Feb 2026) - Initial release for turborepo architecture
- Updated as features change
- Check "Last Updated" at bottom of each guide

Reporting Issues

Found an error in a guide?

1. Note the guide name and section
2. Report via bug reporting feature
3. Mark as "Documentation Issue"
4. We'll update the guide

Suggesting Improvements

Have ideas for improving guides?

- Additional examples needed?
- Confusing sections?
- Missing features?

Submit feedback via bug reporting or contact your manager.

Training Resources

Onboarding

New USER:

1. Read USER_GUIDE.md thoroughly
2. Complete onboarding checklist (if provided)
3. Record test time entry
4. Explore Links page

New QA:

1. Review USER_GUIDE.md (overview)
2. Read QA_GUIDE.md thoroughly
3. Complete QA training with team lead
4. Shadow experienced QA analyst
5. Review sample records

New CORE:

1. Review USER + QA guides (overview)
2. Read CORE_GUIDE.md thoroughly
3. Participate in calibration session
4. Score training dataset
5. Get feedback on initial scores

New FLEET:

1. Review USER + QA + CORE guides (overview)
2. Read FLEET_GUIDE.md thoroughly
3. Shadow experienced fleet manager
4. Practice with test project
5. Review all dashboards and reports

Continuous Learning

- Attend role-specific training sessions
 - Participate in calibration workshops
 - Share learnings with team
 - Stay updated on new features
 - Read updated guide sections
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Role Upgrades

Requesting Role Change

If your responsibilities expand:

1. Discuss with manager

- Explain why you need higher role
- Provide business justification
- Request formal role change

2. Manager evaluates

- Reviews your performance
- Confirms need for access
- Approves or denies request

3. Admin updates role

- Role changed in system
- You receive notification
- New features immediately available

4. Complete training

- Read new role's user guide
- Attend role-specific training
- Shadow experienced team member

Role Downgrade

If you no longer need higher access:

- Contact your manager
- Explain change in responsibilities
- Admin adjusts your role

- You lose access to higher-tier apps
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Guide Statistics

Total Guides: 4 (USER, QA, CORE, FLEET) **Total Pages:** ~60+ pages across all guides **Last Updated:** February 2026 **Format:** Markdown

Coverage:

- All USER features documented
 - All QA features documented
 - All CORE features documented
 - All FLEET features documented
 - ADMIN guide (future)
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Need help? Start with your role's guide, then contact your manager if you have questions!