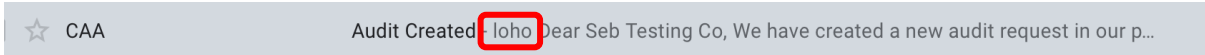
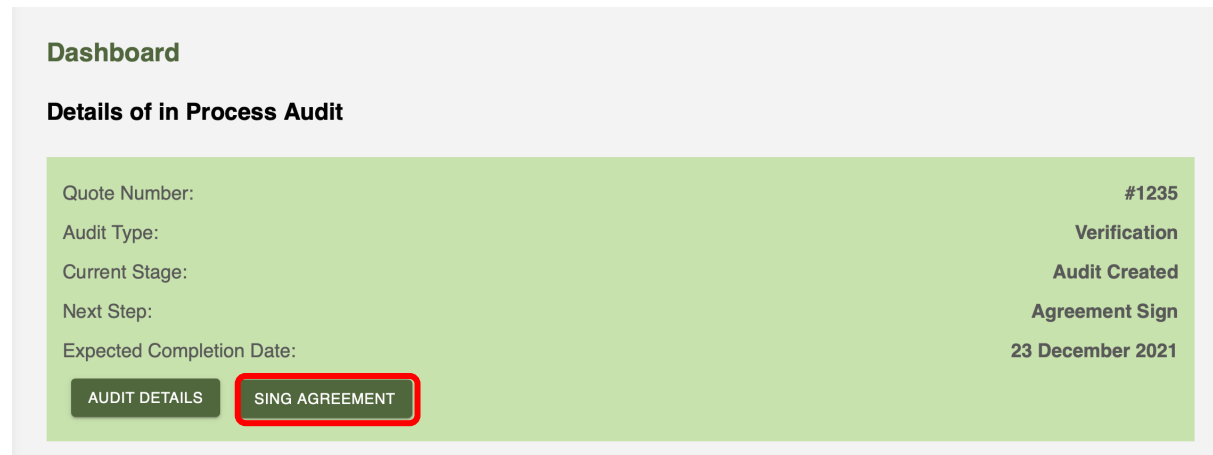


Internal Testing 2 – 23/08/2021

1. Email notifications to client: all the email notifications start with “loho”, which is not visible in the body of the email. Can you help to remove this?



2. Client view: when the audit is created:
 - a. Change the button “SING AGREEMENT” to “SIGN AGREEMENT”
 - b. The button does not seem to work



3. Client view: document uploads:
 - a. Reduce the size of the description box, in order to be sure the whole window is visible on the screen
 - b. Change wording to: “Upload file (you can only choose the following extensions: ###)”
Add a large “+”, as per the picture below

The point above is valid for all document uploads throughout the portal, whether it is from the Admin, Client or Auditor.

Primary ID Document

Name of document *

Primary ID Document

Description of document upload

Upload document File (You can only able to choose .pdf,.jpg,.doc,.docx)

Click to select file or Drag and Drop.

SUBMIT

4. Client view: documents upload general page:
 - a. Change header to "Documents upload for audit reference 1235"
 - b. Change the 3 buttons at the top with the same as the ones used in the sections:
 - i.

Document Upload For "1235"

NOT STARTED 2 ON-GOING COMPLETED 2

CLICK TO SUBMIT ALL DOCUMENTS < BACK

100 Points of ID

Staff's Document

5. Client view: document upload sections and sub-sections:
 - a. Change "InProgress" with "In Progress"
 - b. Each section should have a status visible, depending on the status of the documents:
 - i. If no document is submitted, section shows Pending (red button)
 - ii. If some but not all the documents are submitted, section shows In Progress (black)
 - iii. If all the documents are submitted, section shows Submitted (green)

Staff's Document

^ BACK TO TOP

AI

Seb

Document's needed	Status	Action
Primary ID Document ?	InProgress	
Secondary ID Document ?	Pending	

Company's Document

Document name	Status	Action
Evidence of HR Management ?	Submitted	

6. Client view: document upload page, 2 action buttons:
 - a. One button "Upload", which brings directly to the upload page, not the option to click N/A
 - b. One button "Not applicable" next to it, which brings to the page to give the justifications

Document's needed	Status	Action
Primary ID Document ?	Pending	

7. Client view: document upload page? Change "SAVE LATER" to "SAVE FOR LATER"

Secondary ID Document

☐ Not Applicable

ADD NEW

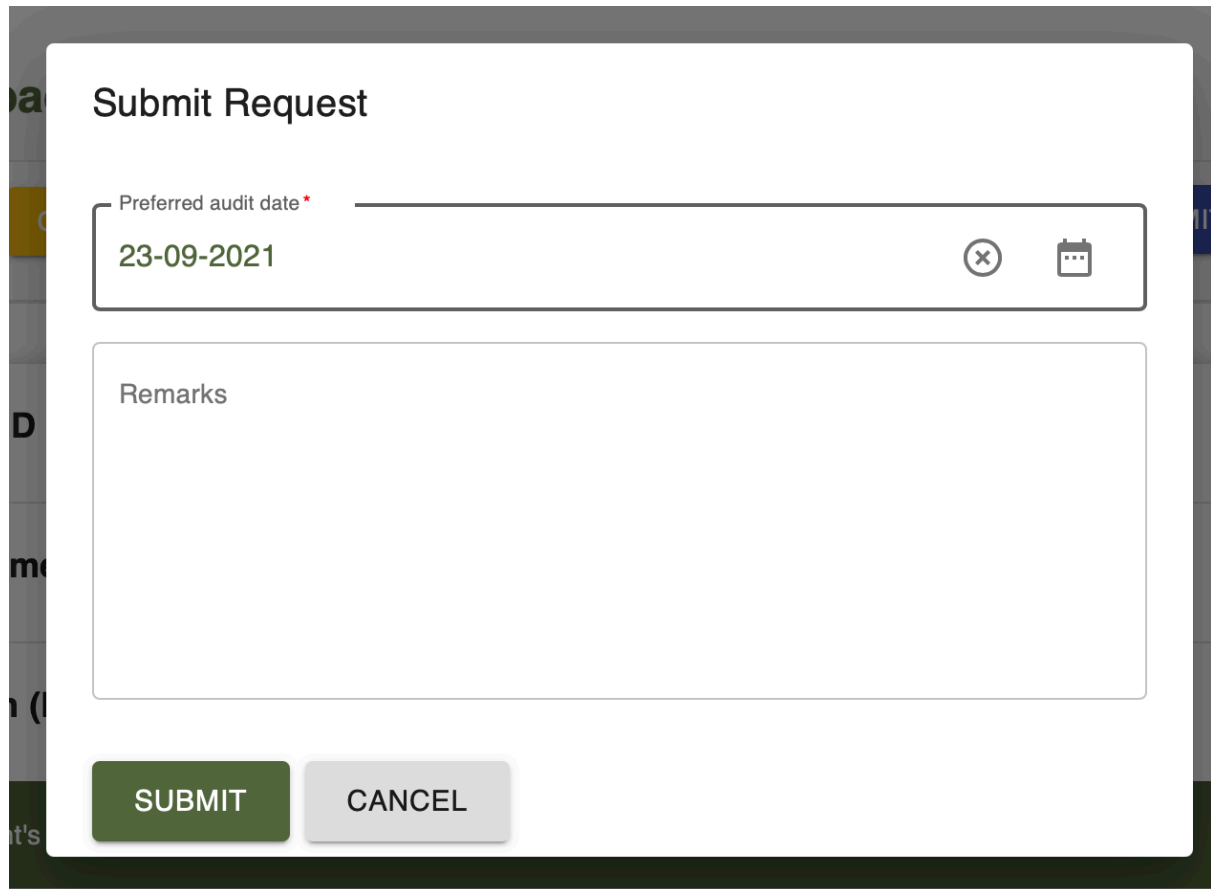
Document name	Description	Action
Secondary ID Document		

SUBMIT

SAVE LATER

8. Client view: audit date booking. This page needs to be clearer:
 - a. Title should be: "Submit the documents and book your audit"

- b. Above the date selection: "Please select your preferred date for the audit to take place:"
- c. Remarks box should be smaller



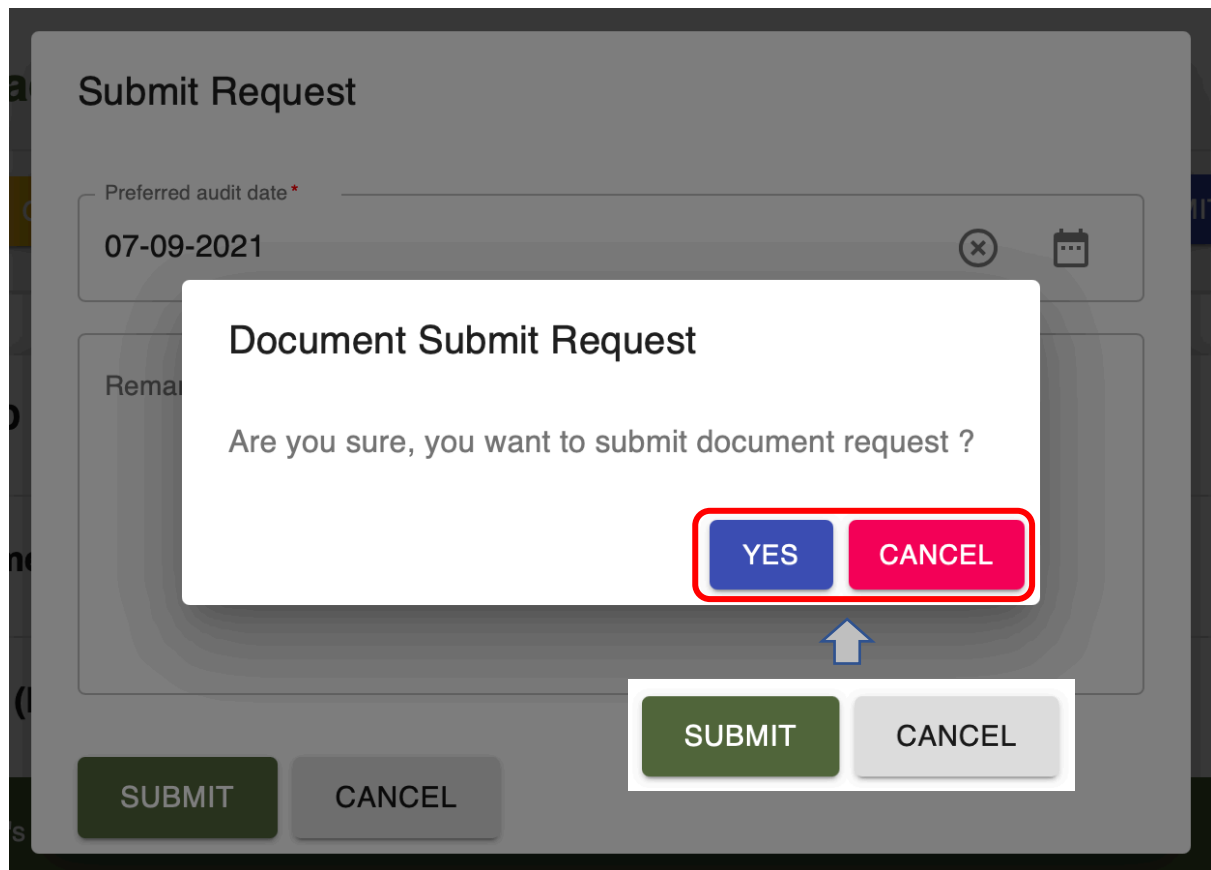
Submit Request

Preferred audit date *

Remarks

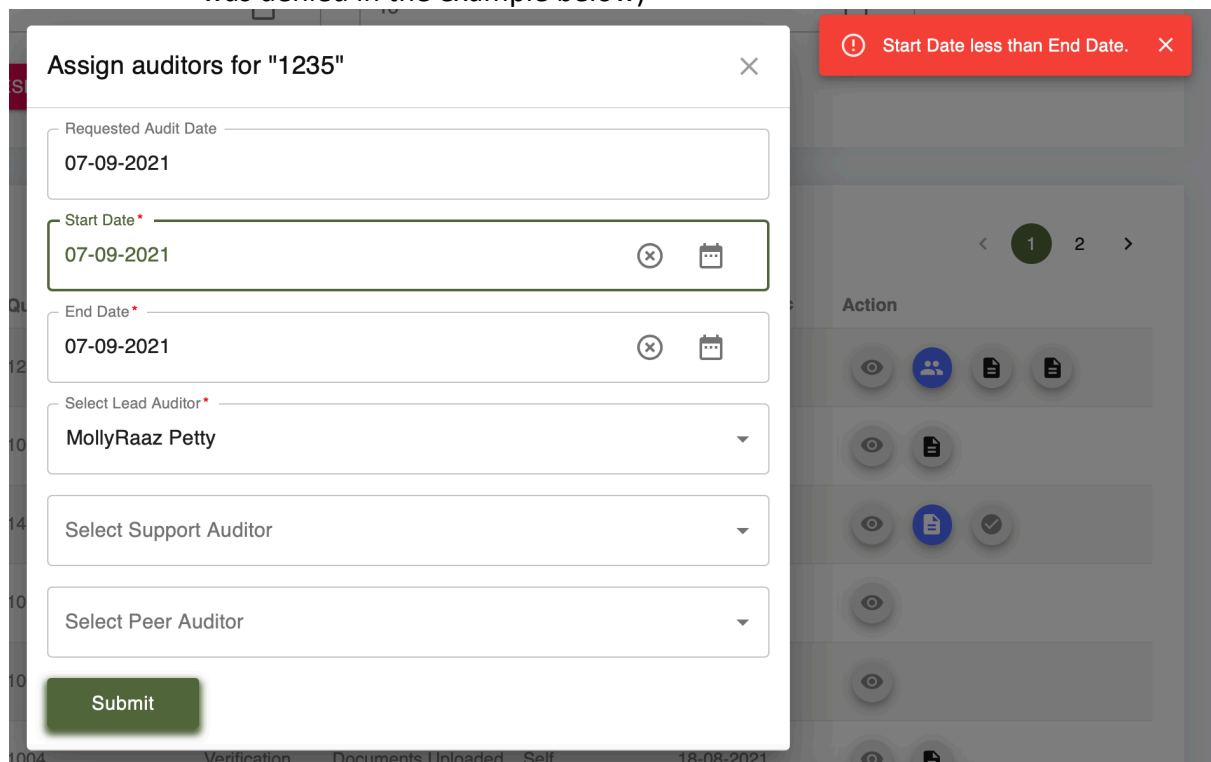
SUBMIT **CANCEL**

- d. After clicking submit. Change the wording to:
 - i. Title: "Submit the documents and book your audit"
 - ii. Text should be: "Are you sure you want to submit all the documents, and book the audit for the following date: [insert date]"
 - iii. At the moment, the Cancel button is not working
 - iv. Confirmation buttons should be the same as above:



9. Admin view: Assign auditors














- a. Title should be: "Assign auditors for audit reference 1235"
- b. We need to be able to choose the same date for start and end date (which was denied in the example below)



10. Auditor view: Audit requests: there is an issue with one of the icons in the window below:

Showing 1 to 4 of 4 entries





^ BACK TO TOP

Action	Quote number	Type	Status	Created At	Updated At
   	1235	Verification	Audit date booked in	23-08-2021	23-08-2021
   	148585	Verification	Completed	18-08-2021	19-08-2021
    	523	Verification	Audit Commenced	18-08-2021	18-08-2021

11. Auditor view: in the window below, the audit has not started yet, so the auditor cannot ask the client to add additional documents yet.

Showing 1 to 4 of 4 entries

^ BACK TO TOP





Action	Quote number	Type	Status	Created At	Updated At
   	1235	Verification	Audit date booked in	23-08-2021	23-08-2021

12. All views (auditor, client and admin):

- Replace "Created At" with "Creation date"
- Replace "Updated At" with "Latest update"
- The filter needs to be on the same line as the text (example of Quote number below)

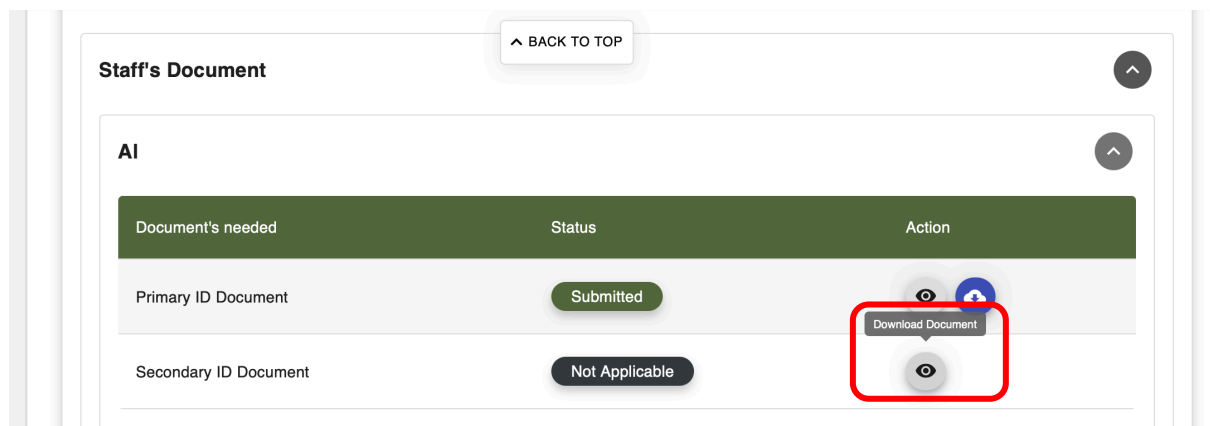
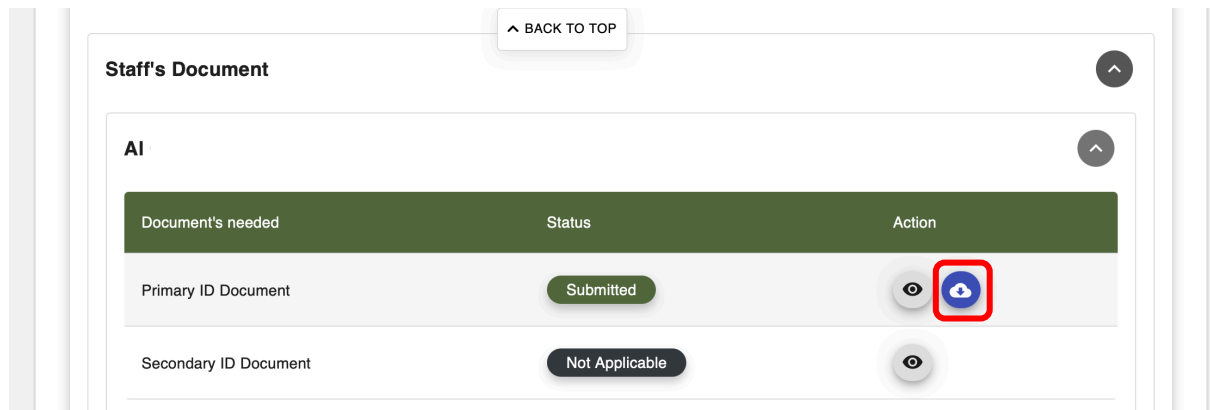
Showing 1 to 4 of 4 entries

^ BACK TO TOP

Action	Quote number	Type	Status	Created At	Updated At
   	1235	Verification	Audit date booked in	23-08-2021	23-08-2021

13. Auditor view: documents download

- The download button below does not work
- When downloading (via the other button), in some cases the file name has completely changed. It needs to remain the same as originally.
- In case there is a N/A document, the icon description should be "View the explanation", instead of "Download document"



14. Client view: Key personnel

a. Issue in the display:

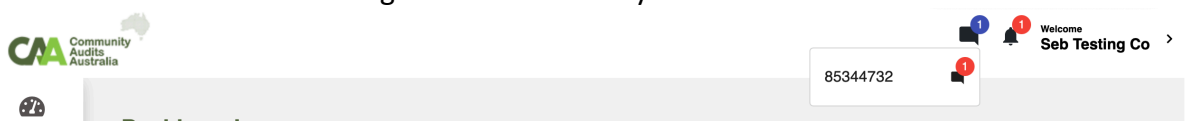
- Phone number appears instead of Email
- Position appears instead of the phone number
- Type of staff appears instead of Position
- etc

b. Please bring the icons to the left so they are visible at all times

Showing 1 to 2 of 2 entries

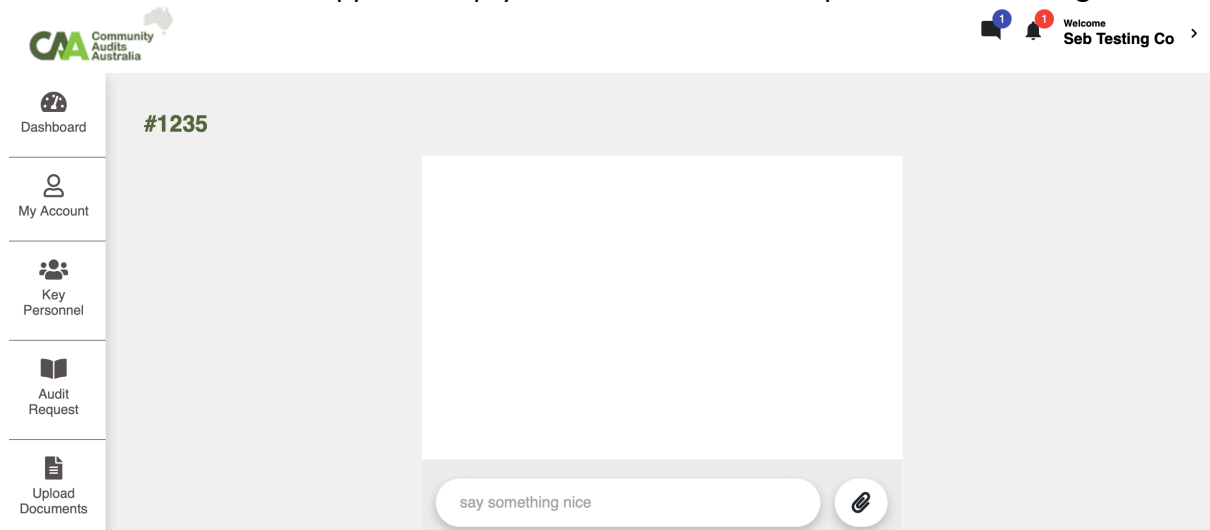
Action	Name	Email	Mobile Number	Position Held	Type
AI Goh	AI@al.al	111111111	Head of Operations	Key Staff	18 August 2021
Seb T	sebastien.trousset@gmail.com	987654321	CEO	Key Personnel	18 August 2021

15. Client view: chat button at the top. The number is confusing, we don't know what is it. Since there can be only one ongoing chat for the client, a simple click on the first chat icon needs to bring to the chat directly.



16. Client view: chat window:

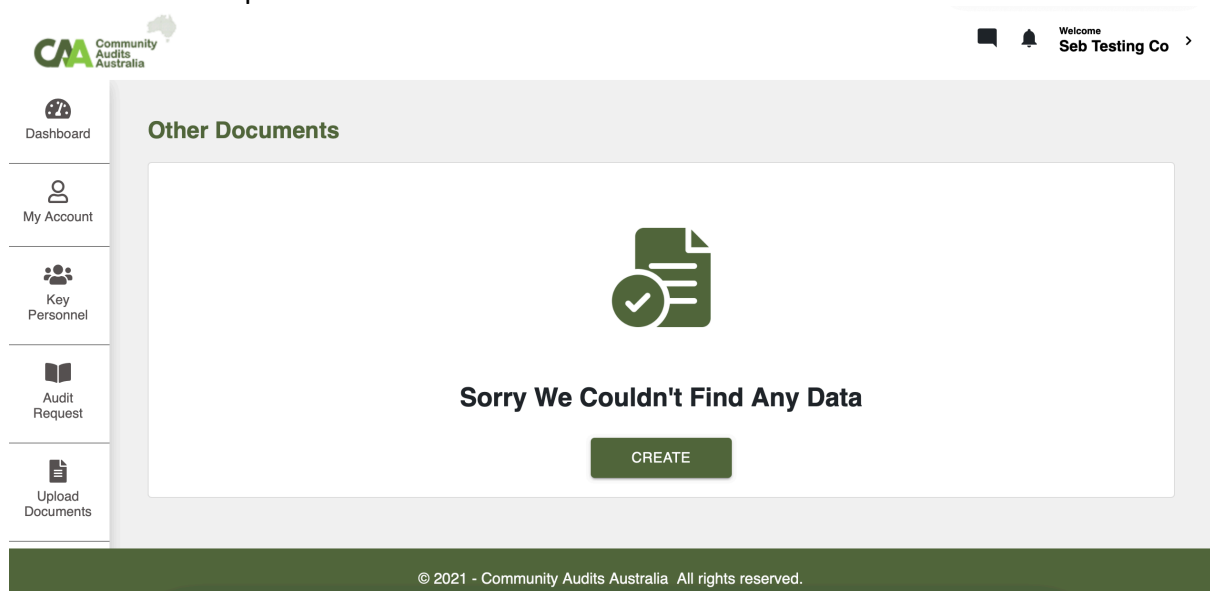
- a. The title needs to be: "Chat with the auditor"
- b. The chat appears empty while the icon at the top shows one message



17. Client view: add additional documents: the current view makes it look like an error message and is not clear

- a. Instead of "Other documents", change to "Additional documents"
- b. Take out the picture and "Sorry we couldn't find any data"
- c. Just display a button "Add documents"

Note: the option to upload additional documents can only be visible whenever the auditor requests additional documents



Once the documents are attached:

- d. There is a display issue (action on the left vs icons on the right)
- e. Replace Updated At with "Latest update"
- f. Send to Auditor button in dark green (same as template color)

Other Documents

+ ADD NEW

Search by title

SEARCH

RESET

SEND TO AUDITOR

Showing 1 to 1 of 1 entries

< 1 >

Action

Title

Updated At

Test

23 August 2021



18. Auditor view: Upload report window

- Grey area: same comments as point 3
- Remove the "Report Remarks" wording

Upload Report (1235)



Remarks *

Report Remarks:

Upload report File (You can only able to choose .pdf, .jpg, .doc, .docx)

Click to select file or Drag and Drop.

SUBMIT

19. Auditor view: When the report is rejected by the client:

- Showing 1 to 4 of 4 entries

Action	Quote number	Type	Status	Created At	Updated At
<div> <div>Upload Report</div> <div> </div> <div> </div> </div>	1235	Verification	Report Rejected	23-08-2021	23-08-2021
<div> </div>	185238	Verification	Audit Commenced	17-08-2021	23-08-2021
<div> </div>	148585	Verification	Completed	18-08-2021	19-08-2021

a. First window “View report”

- SUBMIT CANCEL

i. Wording to be changed to: "Are you sure you want to accept the audit report for the audit ref 1235?"

- A screenshot of a web application interface. The main window is titled "View Report (1235)" and contains a "Remarks*" text area. Overlaid on this is a white modal dialog titled "Accept Report". The dialog asks, "Are you sure, you want to accept report '1235' ?" and has two buttons: "YES" (blue) and "CANCEL" (red). A blue arrow points from the top right of the image to the "CANCEL" button. Below the modal, in the background, are three buttons: "DOWNLOAD" (blue with a cloud icon), "ACCEPT" (grey with a checkmark icon), and "REJECT" (red with an 'X' icon). The top of the background interface shows a "BACK TO TOP" button and a "Status" dropdown menu.

21. Admin view: Once the report is accepted by the client:

- Unless I missed something, the two actions “Mark as completed” and “Submit report” are the same. They should be only one action called: “Submit report to NDIA” (Not AU Gov)

Showing 1 to 15 of 20 entries

Company	Quote number	Type	Status	Signed By	Updated At	Action
Seb Testing Co	1235	Verification	Report finalized by provider	Self	23-08-2021	
ABC Disability	185238	Verification	Audit Commenced	Docusign	23-08-2021	

Showing 1 to 15 of 20 entries

Company	Quote number	Type	Status	Signed By	Updated At	Action
Seb Testing Co	1235	Verification	Completed	Self	23-08-2021	
ABC Disability	185238	Verification	Audit Commenced	Docusign	23-08-2021	

22. All views: Notification pages:

- Title should be “Notifications”
- Window should read “Clear all notifications”
- Text should be “Are you sure you want to clear all the notifications?”
- Clear all button should be dark green
- Yes and Cancel buttons should be green and grey

Notification

CLEAR ALL

Audit Request
13 minutes ago

Seb Testing Co has been accepted
number #1235

Audit Request
17 minutes ago

Seb Testing Co has been rejected report for audit reference
number #1235

Clear Notification

Are you sure, you want to clear all notification ?

YES

CANCEL

23. Client view: audit request page icons

- Remove Chat icon there
- Make all icons grey, except immediate call to action in dark green. Immediate call to actions are:
 - Sign the agreement
 - Pay the invoice
 - Upload the documents

- iv. Upload additional documents
- v. View the report

Audit Request

SEARCH
RESET

Showing 1 to 2 of 2 entries

Action	Quote number	Type	Status	Created At
	1235	Verification	Report submitted to NDIA	23 August 2021

24. Client view: submit additional documents

- a. Icon should read: "Upload additional documents"
- b. The icon can only be visible once the auditor has asked for additional documents

Showing 1 to 2 of 2 entries
BACK TO TOP

Action	Quote number	Type	Status	Created At
<div>Add Other Documents</div>	1235	Verification	Report submitted to NDIA	23 August 2021
	148585	Verification	Report submitted to NDIA	18 August 2021

25. Client dashboard timeline

- a. Remove "Created Date :"
- b. Add the date of the last stage (Report submitted to NDIA) once it is completed
- c. Change the arrows to a plain large arrow as below

