**HSEQ Project Specifications**

**Summary**

This portal will be a source where users can log in, and then access specific documentation linked to them. They must be able to view it online as well as load new updated documents. Admin will be able to view and access all uploaded documents. There will be 2 user sections to this project. Client User interface and admin interface.

**Admin interface:**

Menu will consist of

* Companies (Add/Edit/Delete)
  + Here we will be able to add a company (basic info like contact person, address, email, Tel etc)
* Users (Add/Edit/Delete)
  + User to the system must be loaded via this section. When you load a user, you MUST assign the user to a company. This is how we will manage which documents they are able to see in the frontend.
  + For each user we will also have a section where we set which folders they can see once logged in.
  + User documents – in this section you will be able to see all documents that is managed and viewed by this user.
* Document Categories & Sub-Categories (Add/Edit/Delete)
  + In this section we will be able to create a category (must be able to assign the COMPANIES who can see this from here as well)
  + Sub-Categories: Add sub-categories to a main category, no need to assign
  + At this stage there is only an option to have a main category, with sub-categories, not a sub-sub-category.
* Manage Documents (Add/Edit/Delete)
  + All documents must be loaded from here in the admin area. When a new document is loaded you must assign it to a COMPANY and USER and select the category it will be displayed in. You can also set an expiry date for that document. A notice of document expiry will be sent out to HSEQ and client 30 days prior to expiration.
* Reporting
  + Reporting still to be confirmed, but general reporting will be list of users per company
  + List of categories and their subcategories per company
  + File edited log file to show which files was updated when and by whom

**User interface:**

* The user will log in to the system and for now be able to see the folders they have access to.
* When they open the folder, they will see a list of the files inside the folder. Each file will have a DOWNLOAD button next to it. We will also show EXPIRY date if applicable for the document.
* We will also have an upload button where they can upload a new file on the system.
* Each time they click on download, we will capture the date and time for this user and be able to give feedback on download logs in admin.

**NEW ADDITIONS 31 MAY 2022**

**ADMIN SECTION**

* **Users** (Add/Edit/Delete)
  + We will add 2 new user ROLES – they will also be assigned to a Company same as current users
    - Sub-Admin
    - CEO

**Our Query: 2 Diiferent login for CEO and Sub admin same as User. Right?  
Yes, all will see their own info linked to them. CEO will see same as User**

* + Modify Company so we can assign multiple companies to one user.

**Our Query: multiple compony for user only. Right? And any connection with sub admin and CEO?**   
Yes, they will also be assigned to companies

* **Create Workflow** (Add/Edit/Delete)
  + **Add**: Main Admin will be able to create a workflow and assign to a **Company** AND **Sub-Admin**. When creating a workflow, you will add the following info
    - Document Name (Text)
    - Select Category/Sub-Category (Dropdowns from current category/sub-category)
    - Comments
    - **NOTE**: We will have a PLUS sign so you can add multiple items for each
    - **Once you click on SAVE the workflow will be assigned to the Sub-Admin – See section below on Sub Admin portal view. When they log in to their profile we will show them a list of the companies they manage on the Dashboard.**

**Our Understanding: add, edit and delete by admin with above fields and after save and will display same workflow compony wise in the sub admin. Right?  
Yes, that is 100% - SO if sub admin is assigned 3 companies they will see the 3 companies workflow which admin created**

* + **Edit**: Admin will be able to edit the workflow created above.
    - This will be useful if you want to add additional documents to the workflow.

**Our Query: please explain this  
You will see the created workflow that admin made and they can add/request more docs. From top it is for this function:  NOTE: We will have a PLUS sign so you can add multiple items for each**

* **Manage Workflow**:
  + Manage: When ADMIN clicks on this link, we will show a list of all the documents requested above for each company. Layout will be like this once a company has been selected:

**Our Query: we will display all the documents requested each compony but layout will not same as below screenshot because some fields not available in our database  
Yes, below is just a sample and we will ony show the fields we have, below has many more**A screenshot of a computer

Description automatically generated with medium confidence

* + Admin can now View the files requested in Workflow and also go to each document to SET an EXPIRY date if applicable and update the status. We will show what the document request is:
    - Submitted: Document loaded by Sub-Admin (By default will go to this status)
    - Approved: Admin has set status to APPROVED
    - Expired (Auto set once date has passed)

**Our Understanding: Admin can able to set expire date and status. Right?  
Yes**

* Reporting
  + Outstanding Documents: Filter by Company
  + Expired Documents: Filter by Company

**Our Query: we will display document from workflow. Right?  
Yes, this wil pull from Workflow data**

**SUB-ADMIN VIEW**

* When a Sub Admin logs in, we will show ALL the companies this user has assigned to them.
* When they click on the Company, user is taken to a page where we show all the requested documents (info pulled from Workflow created by admin)
  + For each we will show the name, category, sub-category, comments, file upload, like layout below:

**Our Understanding: When sub admin logs in then will display all requested compony and when click on compony then will display all documents from workflow will display as much as possible field from below screenshot? Yes, so we will show sub-admin which documents they must load and only have columns related to our data**  
A screenshot of a computer

Description automatically generated

* + On each submission, the document will be saved and flagged as SUBMITTED so that the MAIN admin can approve the status and set expiry date if applicable.

**Our Understanding: If main admin change status and expire date then will display here. Right? Yes**

* They can view all companies assigned to them and each will display the same layout of documents requested by admin. Sub-Admin can also edit the uploaded items if they want to update document.

**Our Query: sub admin able to edit work flow. Right? No, they can ONLY upload documents for admin to view. Only main admin can add more items/document requests**