SOP Review Portal Technical Report

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1. Purpose

To outline the function and requirements for a new SOP Review Portal web application. It allows for an organized and accessible method for employees to read their required SOPs and indicate that they have completed the task.

2. Scope

The design described in this document applies to all SOP documents and related paperwork.

3. Requirements

Users must be current i4i employees.

4. Design

This section describes the overall design and layout of the new SOP Review Portal including its functionalities, permissions, and other features.

4.1. Overview

The functionality of the SOP portal is to provide i4i employees with an easier and more organized method of accessing SOPS. The portal will display the assigned SOPs to its respective user based on their Job Roles. The SOPs will appear as links and redirect them to the pdf of the SOP when clicked. The portal can also automatically generate a formal report.

4.2. Users

There will be two categories of users: Admin and General. Each user type will have different permissions

4.2.1. Admin User

The admin user will have permission to view all SOPs and users. They will also be able to update SOP documents, edit users, and assign job roles for General Users.

4.2.2. General Users

General Users will be assigned *Job Roles* and will only have permission to view their assigned SOPs as PDFs.

Table 1: Available SOPs for each Job Role (See HR-02 Training (Matrix starting on page 3)):

Job Role	Available SOPs
All Roles	CP-01 Organization CP-02 Quality Manual CP-03 Business Continuity CP-04 Strategic Plan HR-02 Training IT-01 Security

	IT-03-02 i4i Phone System QA-04 Document Management and Control SD-04 Product Release SD-05 Product Patch Release
Employee	HR-03 Employee Handbook
Consultant	HR-04 In-house Consultant Handbook
Business Dev	CS-01 Customer Support CS-01-01 i4i Software Maintenance and Support SLA CS-03 Shipping QA-03 Issue Tracking and Management SD-01 Feature Addition & Removal
Project Manager	CS-01 Customer Support CS-01-01 i4i Software Maintenance and Support SLA CS-03 Shipping HR-01 Employees IT-02 Backup and Recovery IT-02-01 i4i Backup Strategy QA-01 sops4sops QA-02 Quality Review QA-03 Issue Tracking and Management QC-01 Software Testing Overview QC-02 Software Test Creation Procedures SD-01 Feature Addition & Removal SD-02 Software Development Process SD-02-01 Builds Procedures SD-03 Pre-production Release SD-04-02 Escrow Procedure

Dev Manager	CS-01 Customer Support CS-03 Shipping HR-01 Employees HR-05 External Contractor Engagement IT-02 Backup and Recovery IT-02-01 i4i Backup Strategy QA-01 sops4sops QA-03 Issue Tracking and Management QC-01 Software Testing Overview QC-02 Software Test Creation Procedures QC-03 Software Test Management QC-04 Software Test Execution Procedures SD-01 Feature Addition & Removal SD-02 Software Development Process SD-02-01 Builds Procedures SD-02-02 Digitally Signing Software Components SD-03 Pre-production Release SD-04-01 Release Delivery Policy SD-04-02 Escrow Procedure
Developer	IT-02 Backup and Recovery QA-03 Issue Tracking and Management SD-02 Software Development Process SD-02-01 Builds Procedures SD-02-02 Digitally Signing Software Components SD-03 Pre-production Release SD-04-01 Release Delivery Policy
QC Lead	QA-03 Issue Tracking and Management QC-01 Software Testing Overview QC-02 Software Test Creation Procedures QC-03 Software Test Management QC-04 Software Test Execution Procedures SD-03 Pre-production Release SD-04-01 Release Delivery Policy
QC Analyst	IT-02 Backup and Recovery QA-03 Issue Tracking and Management QC-01 Software Testing Overview QC-02 Software Test Creation Procedures QC-03 Software Test Management QC-04 Software Test Execution Procedures SD-03 Pre-production Release
Client Services	CS-01 Customer Support CS-01-01 i4i Software Maintenance and Support SLA

	CS-02 Customer SPL Conversions CS-02-01 Customer PM & XML PM Conversions CS-03 Shipping QA-03 Issue Tracking and Management SD-04-01 Release Delivery Policy SD-04-02 Escrow Procedure
Documentation	CS-02 Customer SPL Conversions CS-02-01 Customer PM & XML PM Conversions QA-01 sops4sops QA-02 Quality Review QA-03 Issue Tracking and Management QC-01 Software Testing Overview QC-02 Software Test Creation Procedures QC-03 Software Test Management QC-04 Software Test Execution Procedures SD-01 Feature Addition & Removal SD-02 Software Development Process SD-03 Pre-production Release
QA	CS-01 Customer Support CS-01-01 i4i Software Maintenance and Support SLA CS-02 Customer SPL Conversions CS-02-01 Customer PM & XML PM Conversions CS-03 Shipping HR-01 Employees HR-05 External Contractor Engagement IT-02 Backup and Recovery QA-01 sops4sops QA-02 Quality Review QA-03 Issue Tracking and Management QC-01 Software Testing Overview QC-02 Software Test Creation Procedures QC-03 Software Test Management QC-04 Software Test Execution Procedures SD-01 Feature Addition & Removal SD-02 Software Development Process SD-02-01 Builds Procedures SD-03 Pre-production Release SD-04-01 Release Delivery Policy SD-04-02 Escrow Procedure
IT	HR-01 Employees HR-05 External Contractor Engagement IT-02 Backup and Recovery IT-02-01 i4i Backup Strategy

	IT-02-02 i4i Backup and Recovery Procedures IT-02-03 Disk Images for Servers IT-03 IT Systems Administration IT-03-01 i4i Server Room Policy QA-01 sops4sops QA-03 Issue Tracking and Management SD-02-02 Digitally Signing Software Components SD-04-01 Release Delivery Policy SD-04-02 Escrow Procedure
Admin/Ops	CS-03 Shipping HR-01 Employees HR-05 External Contractor Engagement

4.3. Layout and Permissions

This section will describe the application layout and permissions for each user type. Each user will have varying tabs on the task bar, and different buttons and features available.

4.3.1. <u>General User Navbar</u>

Figure : General User Navbar

Figure: Navbar button on-hover

The Navbar section at the top of the page for a General User contains the following options:

- **Home** tab
  - Click Text: Opens the *Home* page with a list of all the available SOP documents.
- **i4i** logo
  - Click Icon: Opens the *Home* page with a list of all the available SOP documents.
- **Account** tab
  - Click Username Text: Opens the *Account* page with information related to the logged in user. Some information includes the user's name, username, and the department they are in. Their password and username can be updated however, everything else will be read-only.
- **Log Out** button
  - Click Text: User is logged out from the application and the *Login Page* displays.
- **Help** button

    - Click Text: Opens *SOP Review Portal Help* PDF of how to use the website.

4.3.2. <u>Admin User Navbar</u>

Figure : Admin User Navbar

The Navbar section at the top of the page for an Admin User contains the following options:

- **Home** tab
    - Click Text: Opens the *Home* page with a list of the SOPs assigned to the logged in user.
- **i4i** icon
    - Click Icon: Opens the *Home* page with a list of the SOPs assigned to the logged in user.
- **SOPs** tab
    - Click Text: Opens a page that shows the list of all available SOPs. The Admin user will be able to add, edit, update, and delete SOPs.
- **Job Roles** tab
    - Click Text: Opens a page that shows a list of all the available Job Roles. The Admin user will be able to add, edit, update, and delete Job Roles.
- **Users** tab
    - Click Text: Opens page that shows a list of all the users for the web application. This list will be useful in informing the admin about which users have completed their SOP readings. The Admin user will be able to modify the list by adding new users or by changing which users have access to the web application. Removing access would apply to former employees who are no longer working at i4i.
- **SOPJB** tab
    - Click Text: Opens a page that shows the relations between SOPs and Job Roles. The Admin user will be able to add and delete SOP and Job Role combinations. Altering this table will affect the Home view for general users as SOPs assigned to their Job Roles will change.
- **USERJB** tab
    - Click Text: Opens a page that shows the relations between Users and Job Roles. The Admin user will be able to add and delete User and Job Role combinations. Altering this table will affect the Home view for general users as Job Roles assigned to Users will change the SOPs they view.
- **Audit Trail** tab
    - Click Text. Opens a page displaying a list of the history of read SOPs from Users. The list cannot be altered by the Admin user. The purpose of the list is important for auditing and will display relevant information relating users to read SOPs.
- **Account** tab

- Click Username Text: Information relating to the logged in user will be displayed. Information such as the password and username can be changed however, other information will be uneditable such as their Active and Admin status.

- **Log Out** button
  - Click Text: User is logged out from the application and the *Login Page* will display.
- **Help** button
  - Click Text: Opens *SOP Review Portal Help* PDF of how to use the website.

4.3.3. Pages/Routes

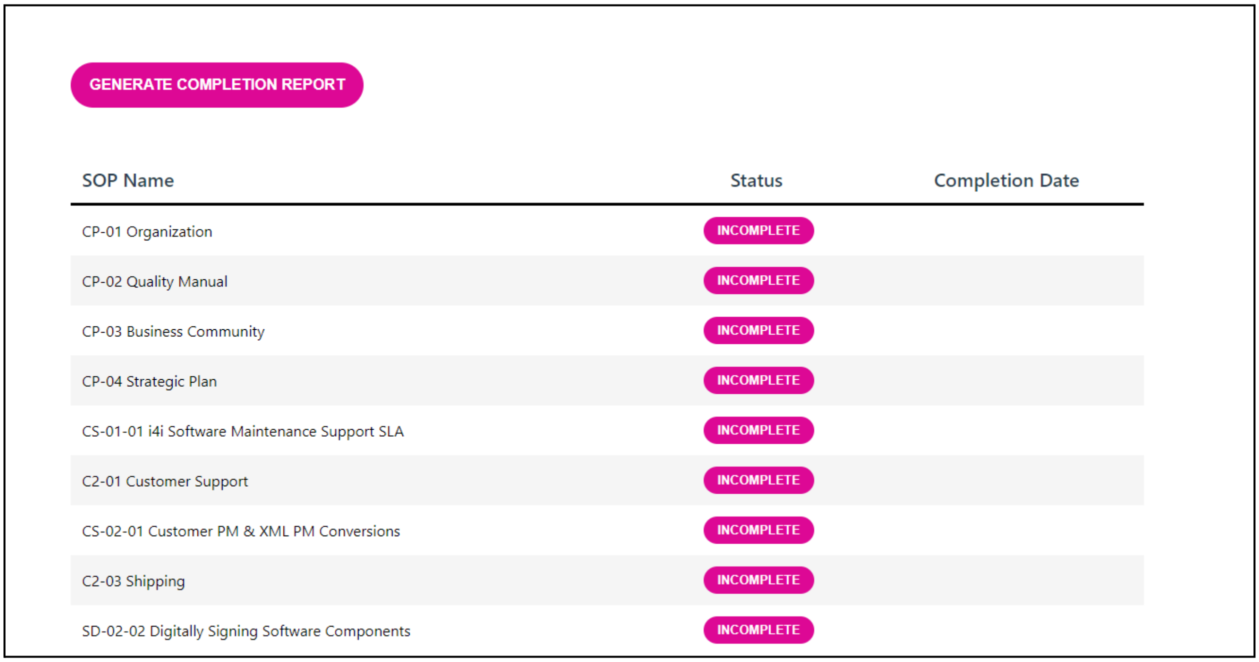
4.3.3.1. SignIn

Figure : Sign In page

Once the user navigates to the web application, the Sign In page will appear. It will contain the following options:

- **Username**
  - Click Enter username here, then type in the given username.
- **Password**
  - Click Enter password here, then type in the given password.

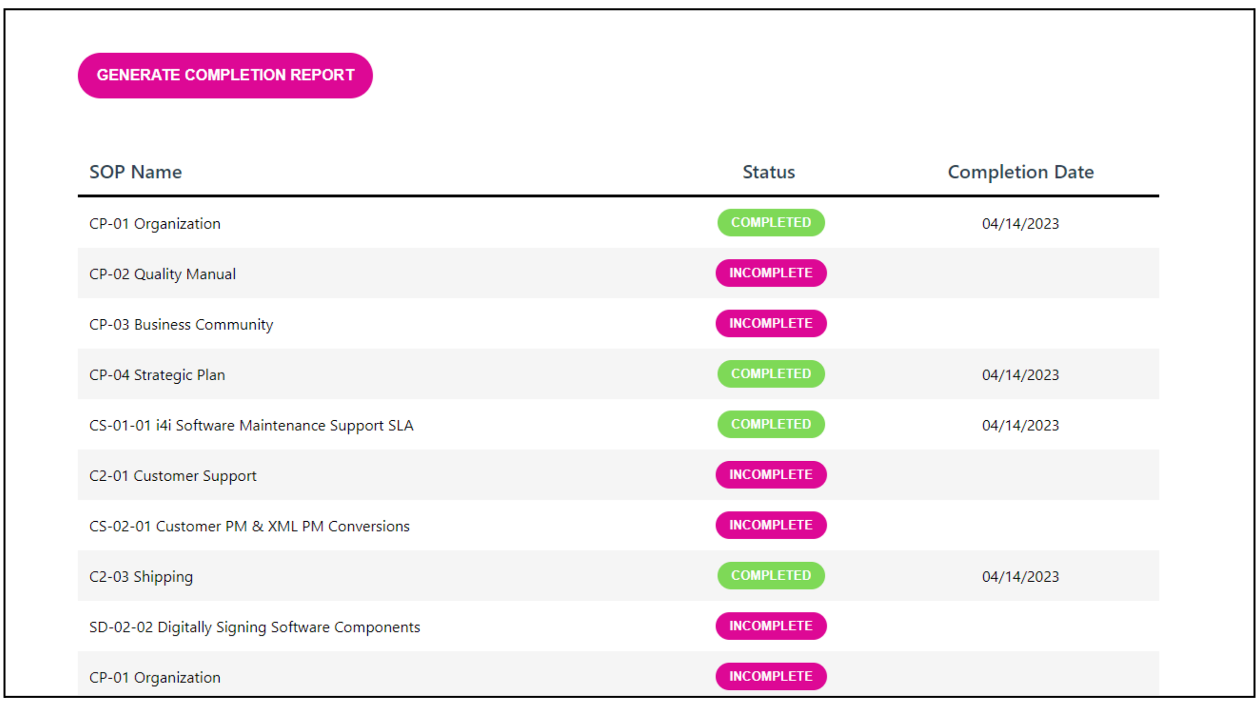
4.3.3.2. Home



GENERATE COMPLETION REPORT

SOP Name	Status	Completion Date
CP-01 Organization	INCOMPLETE	
CP-02 Quality Manual	INCOMPLETE	
CP-03 Business Community	INCOMPLETE	
CP-04 Strategic Plan	INCOMPLETE	
CS-01-01 i4i Software Maintenance Support SLA	INCOMPLETE	
C2-01 Customer Support	INCOMPLETE	
CS-02-01 Customer PM & XML PM Conversions	INCOMPLETE	
C2-03 Shipping	INCOMPLETE	
SD-02-02 Digitally Signing Software Components	INCOMPLETE	

Figure: Home page - No completed SOPs



GENERATE COMPLETION REPORT

SOP Name	Status	Completion Date
CP-01 Organization	COMPLETED	04/14/2023
CP-02 Quality Manual	INCOMPLETE	
CP-03 Business Community	INCOMPLETE	
CP-04 Strategic Plan	COMPLETED	04/14/2023
CS-01-01 i4i Software Maintenance Support SLA	COMPLETED	04/14/2023
C2-01 Customer Support	INCOMPLETE	
CS-02-01 Customer PM & XML PM Conversions	INCOMPLETE	
C2-03 Shipping	COMPLETED	04/14/2023
SD-02-02 Digitally Signing Software Components	INCOMPLETE	
CP-01 Organization	INCOMPLETE	

Figure: Home Page - Some completed SOPs

The Home page is where users will indicate whether they have completed reading the SOPs assigned to them. This page will contain the following sections/functionalities:

- **Generate Completion Report** button

    - Click button: Confirmation message displays. After clicking **OK**, a report is generated consisting of the completion status of each SOP for the user.
- **SOP Name** column
    - Click Text: PDF of selected SOP opens in default browser.
- **Status** button column
    - Contains a button for users to update the status of an SOP. The button changes appearance based on the status of the SOP

Figure: Incomplete SOP button

Figure: Complete SOP button

    - Click button: A confirmation message displays. If **Yes** is clicked, the status is switched. If **No** is clicked, the status does not change.
        - *Incomplete* → *Complete*: *Completion Date* column is set to the current date.
        - *Complete* → *Incomplete*: *Completion Date* is removed.
- **Completion Date** column
    - Read-only: Date can be set or removed by pressing the **Status** button.
- **Page navigator**
    - < button: Opens the previous page of SOPs (if applicable).
    - > button: Opens the next page of SOPs (if applicable).
    - The number in between the arrows is the current page.

4.3.3.3. SOPs

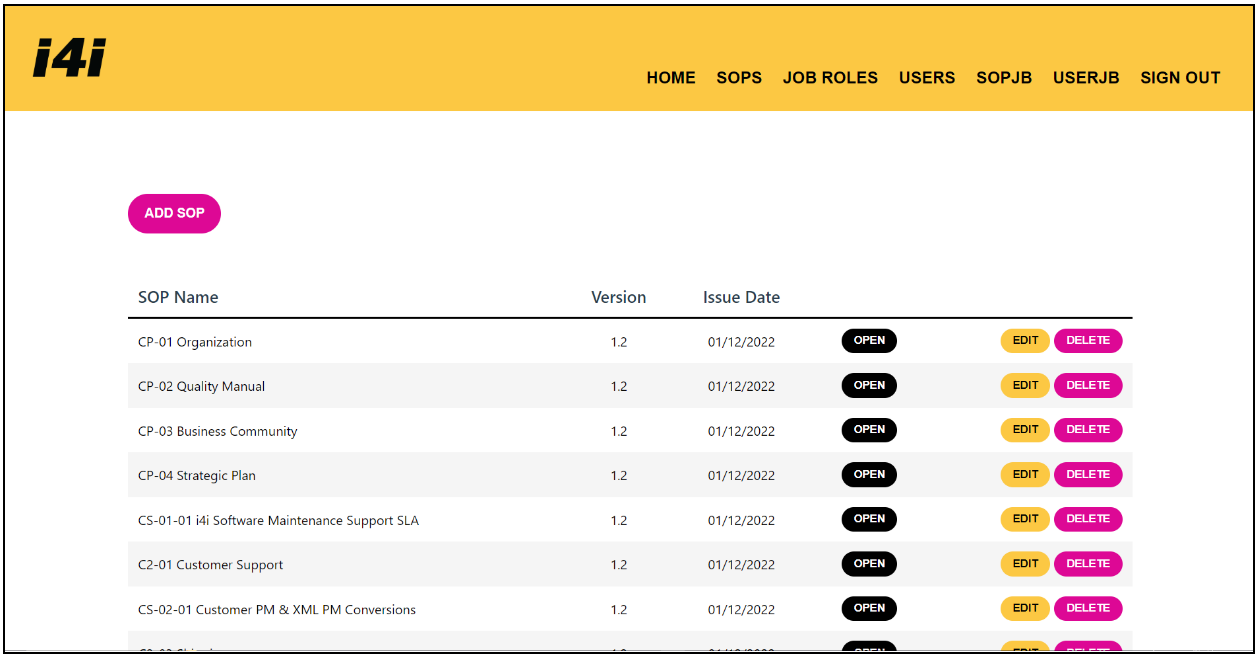


Figure: SOPs page (Admin User)

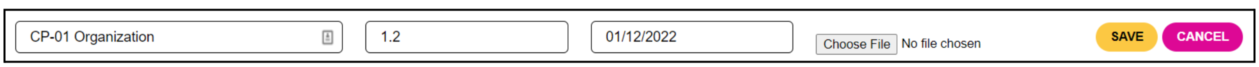


Figure: Editable SOP row

The SOPs page is for managing SOPs and is only accessible by Admin Users. It contains the following sections/functionalities:

- **SOP Name** column
  - Click Text: The SOP opens up in a new window as a PDF.
- **Version** column
  - Read only: displays the version of the SOP.
- **Issue Date** column
  - Read-Only: displays issue date of the SOP.
- **Edit SOP** button
  - Click button: Selected SOP’s information becomes editable. The *Editable SOP row* appears.
- **Delete SOP** button
  - Click button: Confirmation message displays. After clicking **OK**, the SOP is removed from the list.
- **Add SOP** button
  - Click button: *Add SOP* dialog displays.

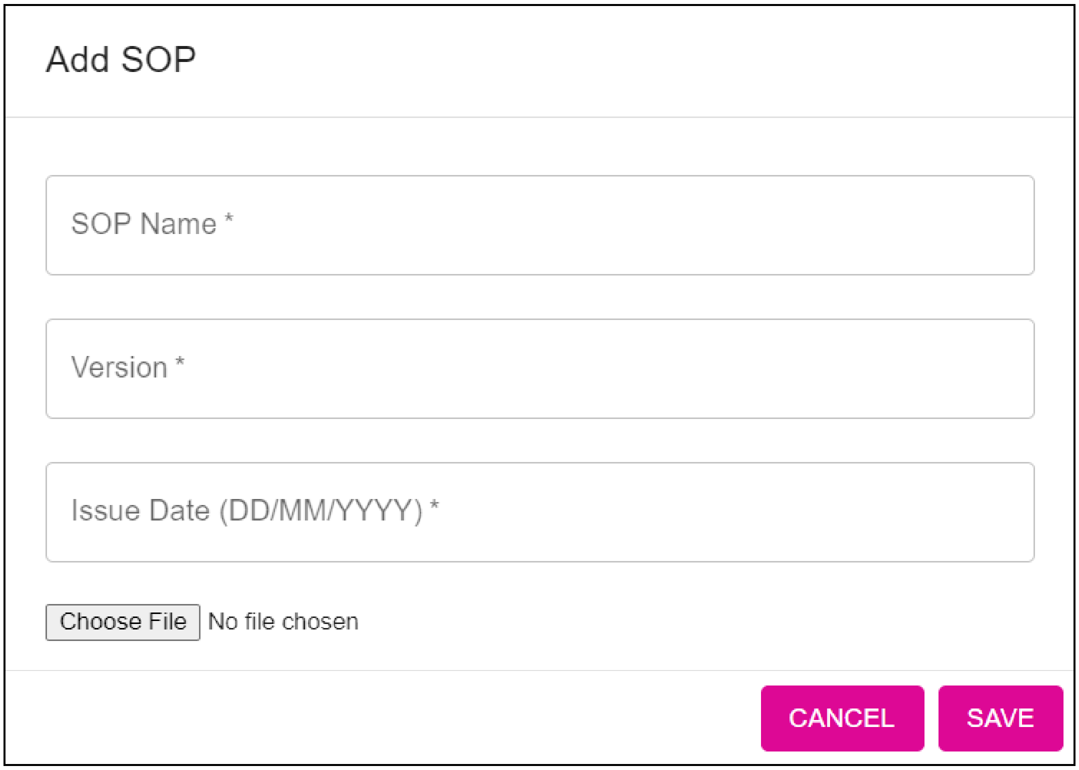


Figure: Add SOP dialog

The *Add SOP* dialog will contain the following:

- **SOP Name**
    - Click Grey Text: Text disappears, user can enter in SOP Name.
- **Version**
    - Click Grey Text: Text disappears, user can enter in the version.
- **Issue Date**
    - Click Grey Text: Text disappears, user can enter in an Issue date.
- **Choose File**
    - Click button: User is prompted to choose a file to upload.
- **Cancel** button
    - Click button: *Add SOP* dialog closes. No SOP is added.
- **Save** button
    - Click button: *Add SOP* dialog closes. If valid, the entered information is added to the list of SOPs.

4.3.3.4. Job Roles

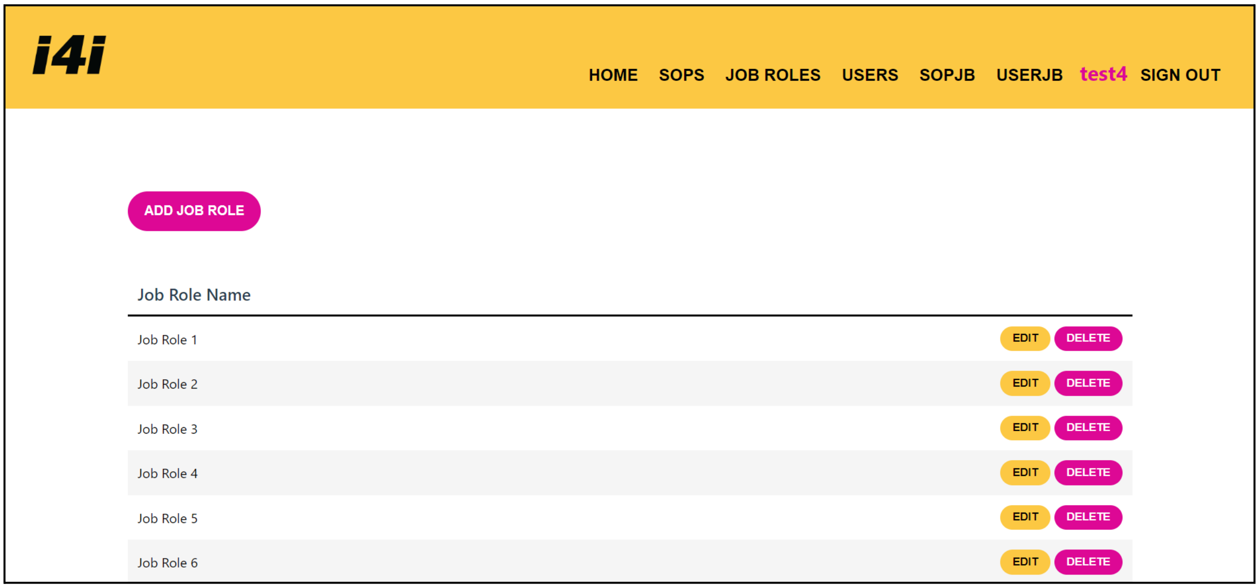


Figure: Job Roles page (Admin User)

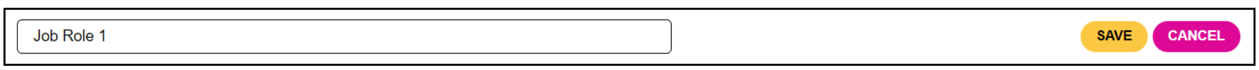


Figure : Editable Job Role row

On the *Job Roles* tab, the Admin User will have the following options:

- **Add Job Role** button
  - Click button: *Add Job Role* dialog displays
- **Edit** button
  - Click button: Selected Job Role's information becomes editable. The *Editable Job Role row* appears.
- **Delete Job Role** button
  - Click button: Confirmation message displays. After clicking **OK**, the SOP Job Role combination is removed from the list.

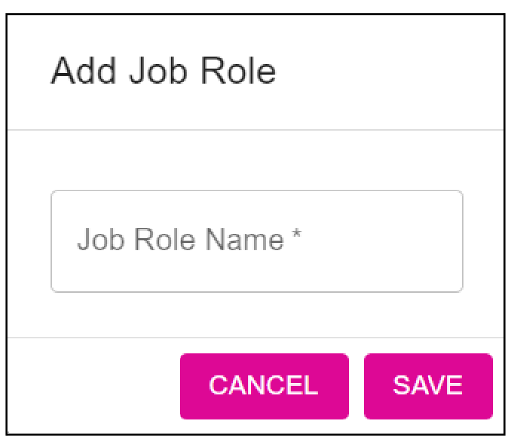


Figure : Add Job Role dialog

The *Add Job Role* dialog will contain the following:

- **Job Role Name**
  - Click Grey Text: Text disappears, user can enter in a Job Role Name.
- **Cancel** button
  - Click button: *Add Job Role* dialog closes. No Job Role is added.
- **Save** button
  - Click button: *Add Job Role* dialog closes. If valid, the entered information is added to the list of Job Roles.

4.3.3.5. Users

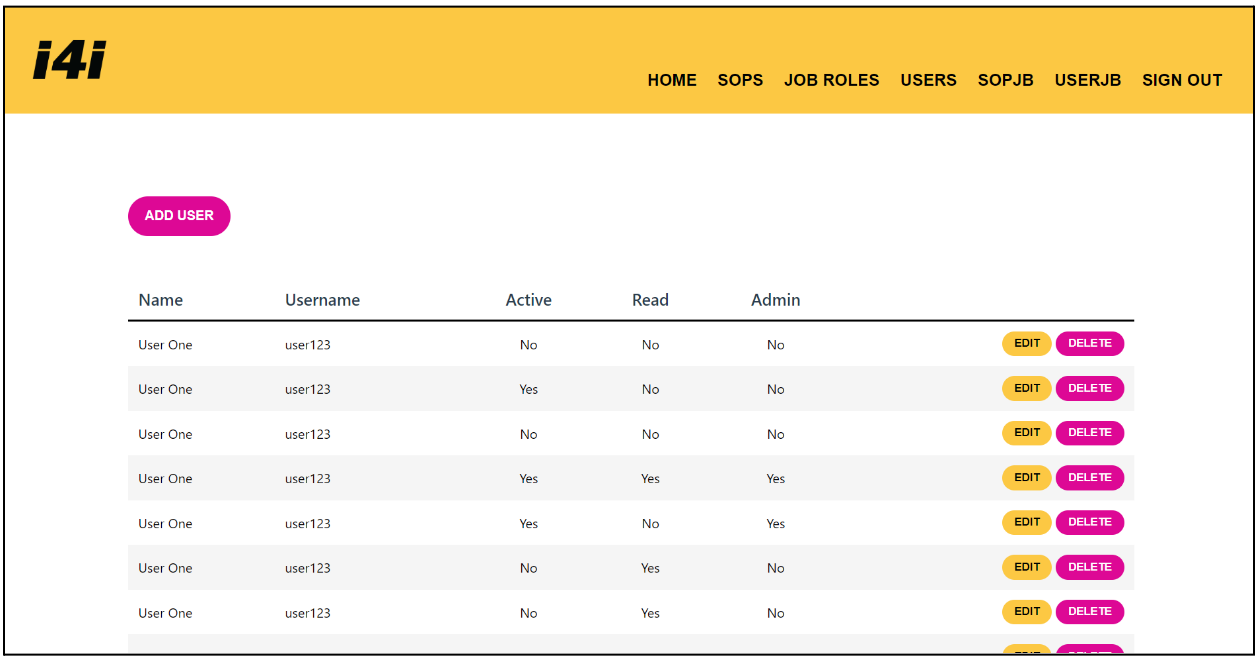


Figure: Users page (Admin User)

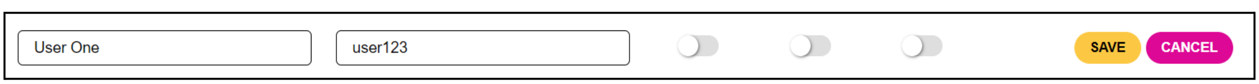


Figure: User Editable row

On the *Users* tab, the Admin User will have the following options:

- **Add User** button
  - Click button: *Add User* dialog displays.
- **Remove User** button
  - Click button: Confirmation message displays. After clicking **OK**, the selected user is removed from the list.
- **Edit** button
  - Click button: Selected user's information becomes editable.
- **Page navigation** buttons
  - < button: Opens the previous page of users (if applicable)
  - > button: Opens the next page of users (if applicable)

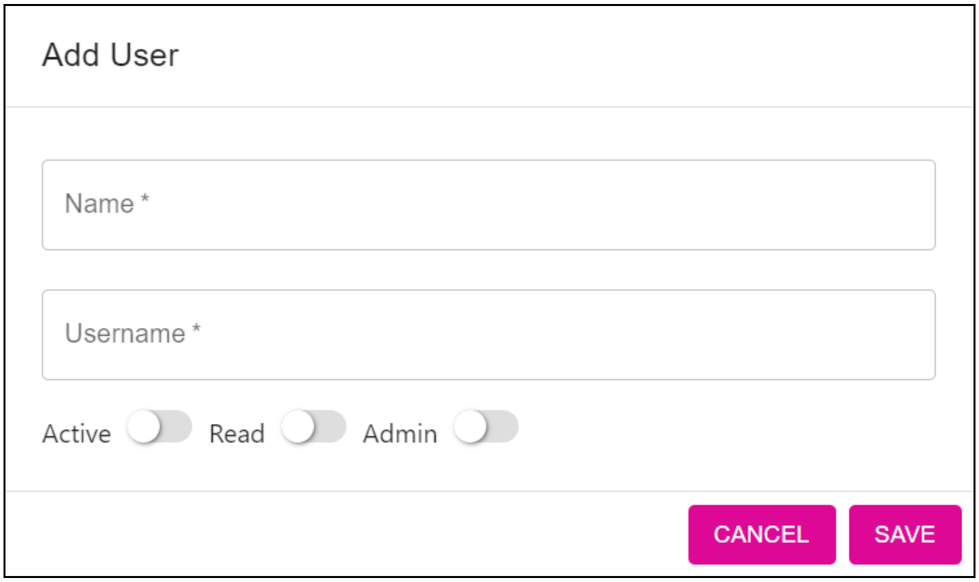


Figure: Add User dialog

The *Add User* dialog will contain the following:

- **Name**
  - Click Grey Text: Text disappears, user can enter in first name.
- **Username**
  - Click Grey Text: Text disappears, user can enter in a username.
- **Employee** status
  - Click Toggle button: The status will be switched on or off.
  - **Active**
    - On: User is active
    - Off: User is inactive
  - **Read**
    - On: User has read all of their SOPs
    - User has not read all of their SOPs
  - **Admin**
    - On: User is an Admin User
    - Off: User is a General User
- **Cancel** button
  - Click button: *Add User* dialog closes. No User is added.
- **Save** button
  - Click button: *Add User* dialog closes. If valid, the entered information is added to the list of Users.

4.3.3.6. SOPJB

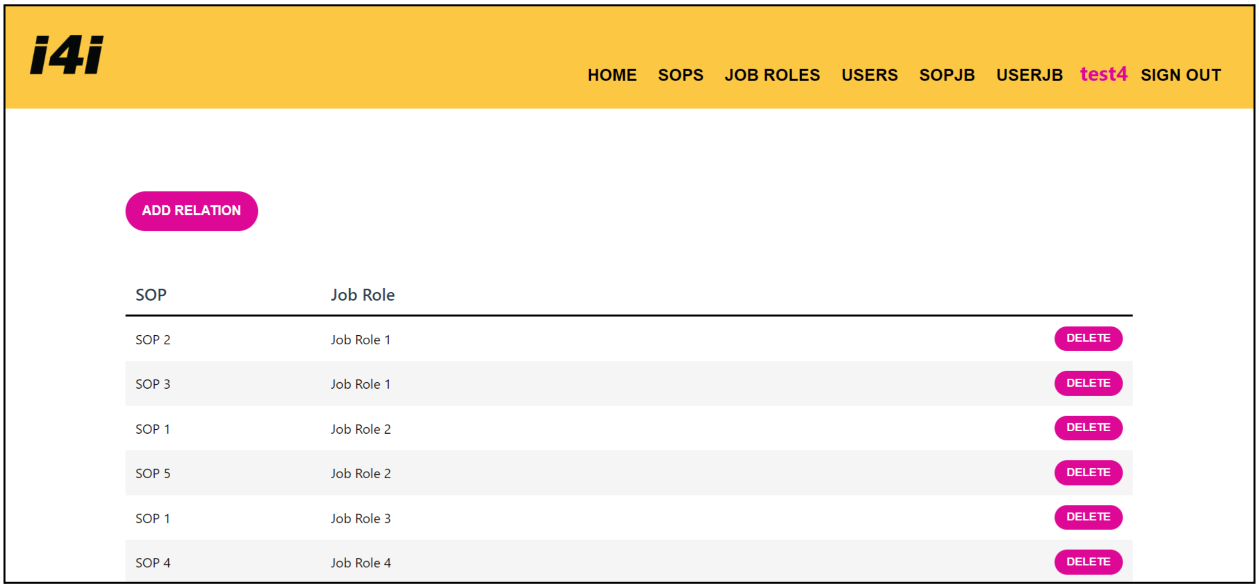


Figure: SOP Job Role page(Admin User)

On the SOP *Job Role* page, the Admin User will have the following options:

- **Add Relation** button
    - Click button: *Add SOP Job Role* dialog displays
- **Delete Job Role** button
    - Click button: Confirmation message displays. After clicking **OK**, the User Job Role combination is removed from the list.

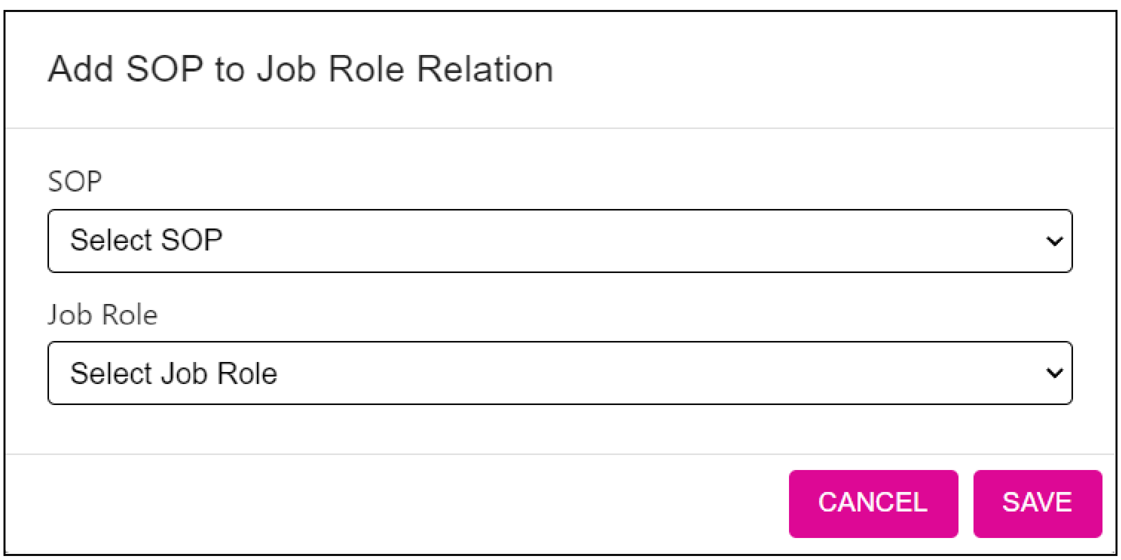


Figure: Add SOP Job Role dialog

The *Add SOP Job Role* dialog will contain the following:

- **SOP** dropdown

- ○ Click Dropdown: List of all the SOPs displays. User can select an SOP by clicking it.
- **Job Role** dropdown
  - ○ Click Dropdown: List of all the Job Roles displays. User can select a Job Role by clicking it.
- **Cancel** button
  - ○ Click button: *Add SOP Job Role* dialog closes. No SOP to Job Role relation is added.
- **Save** button
  - ○ Click button: *Add SOP Job Role* dialog closes. If valid, the entered information is added to the list of Sop to Job Role relations.

4.3.3.7. UserJB

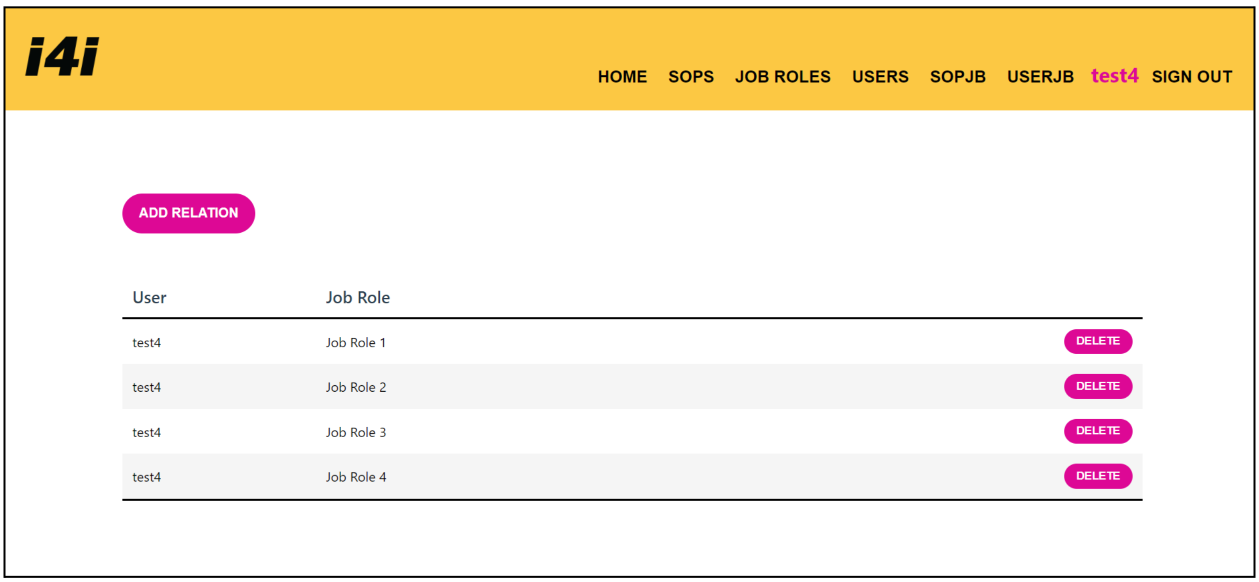


Figure: User Job Role page (Admin User)

On the User *Job Role* page, the Admin User will have the following options:

- **Add Relation** button
  - ○ Click button: *Add User Job Role* dialog displays
- **Delete Job Role** button
  - ○ Click button: Confirmation message displays. After clicking **OK**, the Job Role is removed from the list.

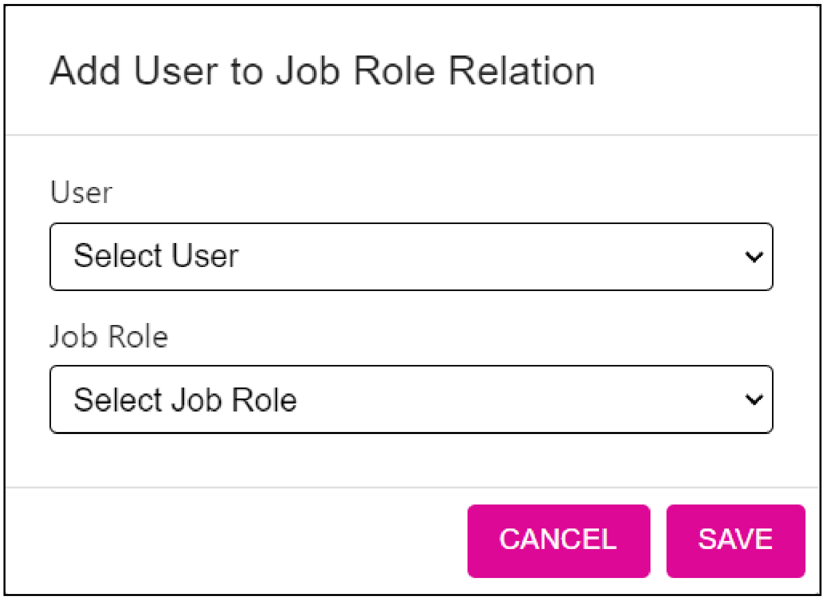


Figure: Add User Job Role dialog

The *Add User Job Role* dialog will contain the following:

- **User** dropdown
    - Click Dropdown: List of all the Users displays. User can select a User by clicking it.
- **Job Role** dropdown
    - Click Dropdown: List of all the Job Roles displays. User can select a Job Role by clicking it.
- **Cancel** button
    - Click button: *Add User Job Role* dialog closes. No User to Job Role relation is added.
- **Save** button
    - Click button: *Add User Job Role* dialog closes. If valid, the entered information is added to the list of User to Job Role relations.

4.3.3.8. Account

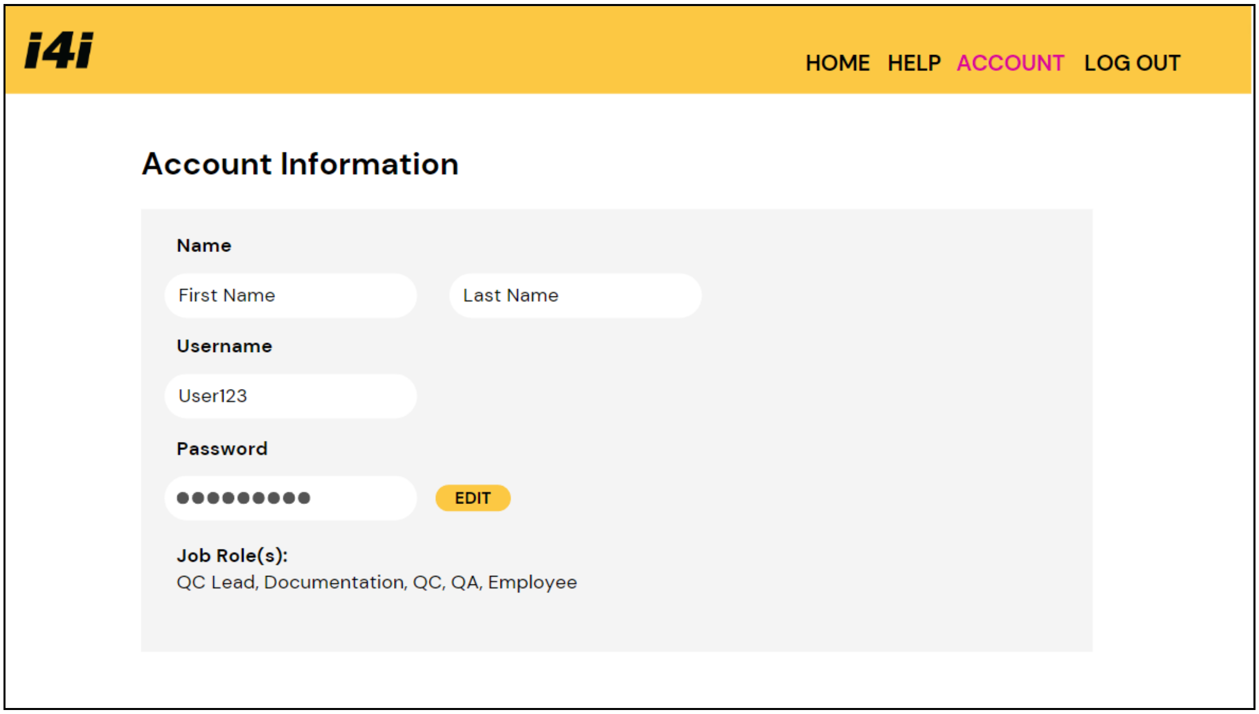


Figure: Account Page

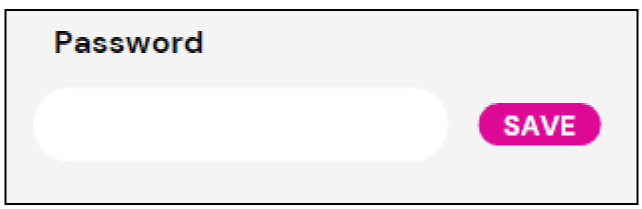


Figure: Edit Password

The *Account* page contains the following sections/functionalities:

- **Name**
  - Read-only: displays the current User's first and last name.
- **Username**
  - Read-only: displays the current User's username.
- **Password**
  - Click Edit Password button: User is prompted to enter their current password. If valid, the field becomes editable (reference *Figure: Edit Password*) and the user can click the Save button to change their password.
- **Job Role(s)**
  - Read-only: displays a list of the user's Job Roles.

4.3.3.9. Audit Trail

Username	SOP Name	Version	Issue Date	Date Read
User123	CP-01 Organization	1.2	12/15/22	12/15/22
User234	CP-02 Quality Manual	1.2	12/15/22	12/15/22
User321	CP-03 Business Continuity	1.2	12/15/22	12/15/22
User443	CP-04 Strategic Plan	1.2	12/15/22	12/15/22
User111	CS-01-01 i4i Software Maintenance and Support SLA	1.2	12/15/22	12/15/22
User456	CS-01 Customer Support	1.2	12/15/22	12/15/22
User987	CS-02-01 Customer PM & XML PM Conversions	1.2	12/15/22	12/15/22
User456	CS-01 Customer Support	1.2	12/15/22	12/15/22
User987	CS-02-01 Customer PM & XML PM Conversions	1.2	12/15/22	12/15/22

‹ 1 of 10 ›

Figure: Audit Trail Page

The Audit Trail page will be read-only and consist of the following:

- **Username**
- **SOP Name**
- **Version**
- **Issue Date**
- **Date Read**

4.3.3.10. Help

This page will consist of instructions on how to complete the functionalities listed in section 4.4. The design is TBD. (Perhaps something similar to the A4L Help page)

4.4. Functionalities

4.4.1. SOP Status

A General User can edit the status of their required SOPs. The statuses are as follows:

- *Incomplete*. (default)
- *Complete*. The *Completion Date* is the date that the status was set to *Complete*.

4.4.1.1. Set Status to Complete

To set the status to *Complete*, a General User can click the pink *Status* button. A confirmation message will display. Click **Yes** to confirm the change. The button will then change to green. Setting the status to green will then add the new information to the Audit Trail.

4.4.1.2. Set Status to Incomplete

To return the status to *Incomplete*, a General User can click the *Status* button again. A confirmation message will then display. Click **Yes** to confirm the undo. Click **No** to cancel the undo. Setting the status to pink will delete the information from the Audit Trail and also remove the *Completion Date* for that SOP. In addition, SOP statuses are set to *Incomplete* on a yearly basis.

4.4.2. Generating a Completion Report

A Completion Report can be generated at any time in the home screen by clicking **Generate Completion Report** > Confirmation message > PDF of the report is opened in the default browser. The user then can download the file and share it to management.

4.4.3. Manage SOPs

4.4.3.1. Add an SOP

Adding an SOP is only available for Admin users in the SOPs page. By clicking the *Add SOP* button, the *Add SOP* dialog will display in which various fields will need to be populated, and a pdf file needs to be uploaded. The uploaded PDF will be the document that the user is redirected to when they click the respective SOP title through the *Home* page. After clicking **Save**, the SOP will be added to the list of SOPs and can be used to manage relations with Job Roles.

4.4.3.2. Edit an SOP

Editing an SOP differs between the Admin User and a General User. For a General User, they can click the *Status* button for the appropriate document which will update the SOP's status and the audit trail. The Admin user has many more privileges when it comes to editing an SOP. By clicking *Edit SOP,* a dialog will pop up where they will have access to upload the new PDF file for the selected SOP. Additionally, the Admin user will be able to update the *Version* number for version control and to change the *Effective Date* of the SOP. The list will update and all changes will be saved after clicking **Save**.

4.4.3.3. Delete an SOP

Deleting an SOP is only available for Admin users. By clicking the *Delete SOP* button, a confirmation message will display prompting the user to confirm their actions. After clicking **OK**, the SOP in the list and any instances of the SOP in the SOPJB list will be deleted.

4.4.4. Manage Users

4.4.4.1. Add a User

Adding a user is only available for Admin users. By clicking the *Add User* button the *Add User dialog* will display in which various fields, including credentials, need to be populated for a valid user to be created. After clicking **Save** and creating a new user, the user will be added to the list of users and the portal can be accessed with the assigned privileges by using the new credentials. When a user is created, the default password for logging is “forty2”. The newly created user can be used to manage relations with Job Roles.

4.4.4.2. Edit a User

For Admin users, clicking the *Edit User* button will make the selected User's information editable. The *Active*, *Admin,* and *Read* fields can be set to “Yes” or “No”. By changing the Active status of the user, it changes whether the user's credentials have access to the portal. By changing the Admin status of the user, it changes whether the user's credentials have Admin privileges in the application. The Read status of the user has no functionality in accessing any features in the portal and is just for auditing purposes. The list will update and all changes will be saved after clicking **Save**. In addition, all active users will be able to update their own password and username through the Accounts page by clicking their username in the navbar.

4.4.4.3. Delete a User

Deleting a user is only available for Admin users. By clicking the *Delete User* button, a confirmation dialog will display prompting the user to confirm their actions. After clicking **OK**, the user will be removed from the list and can no longer access the portal. In addition, any instances of the user in the UserJB list will be deleted.

4.4.5. <u>Manage Job Roles</u>

Managing Job Roles is a feature that is limited to only admin users.

4.4.5.1. Add a Job Role

By clicking the *Add Job Role* button, the *Add Job Role* dialog will be displayed in which the Job Role title needs to be populated. After clicking **Save**, the Job Role will be added to the list of Job Roles and can be used to manage relations with Users and SOPs.

4.4.5.2. Edit a Job Role

By clicking the *Edit Job Role* button, the title of the selected Job Role will become editable. Changing the title will only apply after clicking **Save** and will update the list of Job Roles.

4.4.5.3. Delete a Job Role

By clicking the *Delete Job Role* button, a confirmation dialog will display prompting the user to confirm their actions. After clicking **OK**, the Job Role will be deleted from the list and any instances of the Job Role in the UserJB and SOPJB lists will be deleted.

4.4.6. <u>Manage Relations</u>

Managing Relations is a feature that is limited to only admin users. Altering the SOPJB list changes the SOPs to Job Roles assignments. Similarly, altering the UserJB list changes which Job Roles are assigned to which users. Ultimately, modifying relations affects the SOPs that users can view through their *Home* page.

4.4.6.1. Add a Relation

By clicking the *Add Relation* button, the *Add Relation Dialog* will display with two dropdown menus. If the button is clicked in the UserJB page, the dropdowns will contain the list of Users and Job Roles. Similarly, if the button is clicked in the SOPJB page, the dropdowns will contain the list of

SOPs and Job Roles. The user will have to select one option from each dropdown and click **Save** to add the relation to the list.

4.4.6.2. Delete a Relation

By clicking the *Delete Relation* button, a confirmation dialog will display prompting the user to confirm their actions. After clicking **OK**, the relation will be deleted from their respective list.

4.4.7. Sign Out

After clicking the **Sign Out** button in the navbar, the user will be redirected to the *Login* page where their privileges will be revoked. They will not be able to access any other pages until an active user's credentials are entered.

5. Use Cases

5.1. Login as an invalid user

a) Attempt to log in to the portal with invalid credentials.
An error message is displayed in the Sign In page and the user is prompted to log in with valid credentials.

b) Try navigating to the following routes through the search bar.
   i) /
   ii) /SOPs
   iii) /JobRoles
   iv) /Users
   v) /SOPJB
   vi) /UserJB
   vii) /audit

User is unable to navigate to those pages and is redirected to the Sign In page.

5.2. Login as Admin User

a) Log in to the portal with credentials belonging to an Admin user.

5.2.1. Alter the SOPs Page

a) Navigate to the *SOP* page through the navbar.
b) Click the **Add SOP** button.
c) In the dialog, populate all the fields.
d) Click **Upload New** and upload a PDF file.
e) Click **Save**.
The information is added to the list of SOPs.
f) In the same row as the added SOP, click **Edit**.
The information for the selected SOP becomes editable.
g) Change the text within the editable inputs and click **Save**.
The information for the selected SOP returns to read-only and is updated in the list.
h) In the same row as the previously added SOP, click **Delete**.
A confirmation message is displayed.
i) Click **OK**.
The added SOP is deleted from the list.

5.2.2. Alter the Users Page

a) Navigate to the *USERS* page through the navbar.
b) Click the **Add User** button.
c) In the dialog, populate all the fields.
d) Click **Save**.
The information is added to the list of Users.
e) In the same row as the added User, click **Edit**.
The information for the selected User becomes editable.
f) Change the text and toggles within the editable inputs and click **Save**.
The information for the selected User returns to read-only and is updated in the list.
g) In the same row as the previously added User, click **Delete**.
A confirmation message is displayed.
h) Click **OK**.
The selected User is deleted from the list.

5.2.3. Alter the Job Roles Page

a) Navigate to the *JOB ROLES* page through the navbar.
b) Click the **Add Job Role** button.
c) In the dialog, populate the title field.
d) Click **Save**.
The information is added to the list of Job Roles.
e) In the same row as the added Job Role, click **Edit**.
The title for the selected Job Role becomes editable.
f) Change the text within the editable inputs and click **Save**.
The title for the selected Job Role returns to read-only and is updated in the list.
g) In the same row as the previously added Job Role, click **Delete**.
A confirmation message is displayed.
h) Click **OK**.
The selected Job Role is deleted from the list.

5.2.4. Alter the SOPJB page

a) Navigate to the *SOPJB* page through the navbar.
b) Click the **Add Relation** button.
c) In the dialog, ensure that the dropdowns contain all the SOPs and Job Roles as those listed in their respective pages.
d) Populate all the fields in the dialog.
e) Click **Save**.
The information is added to the list.
f) In the same row as the previously added relation, click **Delete**.
A confirmation message is displayed.
g) Click **OK**.
The selected combination is deleted from the list.
h) Repeat steps b) to e) with 5 different combinations of Job Roles (choose at least 2 different Job Roles) and SOPs (choose at least 2 different SOPs) and take note of the Job Roles and SOPs selected.

5.2.5. Alter the UserJB page

a) Navigate to the *USERJB* page through the navbar.

b) Click the **Add Relation** button.
c) In the dialog, ensure that the dropdowns contain all the Users and Job Roles as those listed in their respective pages.
d) Populate all the fields in the dialog.
e) Click **Save**.
The information is added to the list.
f) In the same row as the previously added relation, click **Delete**.
A confirmation message is displayed.
g) Click **OK**.
The selected combination is deleted from the list.
h) Repeat steps b) to e) with the current user and Job Roles selected in 5.2.4 step h).

5.2.6. Alter the Account page

a) Navigate to the Accounts page by clicking on the Username text in the navbar.
b)

5.2.7. Interact with the Home Page

a) Navigate to the *HOME* page through the navbar.
The SOPs selected in 5.2.4 step h) are displayed in the list of SOPs without any duplicates.
b) Click the title of any of the listed SOPs.
User is redirected to the PDF of the SOP.
c) Return to the portal and click the **Completed** button for an SOP with a pink background and record the respective SOP's name.
The background of the selected button changes to green and that the completion date is added for the appropriate SOP.
d) Navigate to the *AUDIT TRAIL* page through the navbar.
The first element of the list contains the current user's username, the previously selected SOP's name, and the appropriate completion date.
e) Navigate back to the *HOME* page through the navbar.
f) Click the **Completed** button for the previously selected SOP.
The background of the selected button changes to pink and that the completion date is removed for the appropriate SOP.
g) Navigate to the *AUDIT TRAIL* page through the navbar.
The information noted in Step d) is no longer in the list.

5.3. Log in as General User

a) Log In to the portal with credentials belonging to a General user.
b) Attempt to navigate to the following routes through the search bar
   i) /SOPs
   ii) /JobRoles
   iii) /Users
   iv) /SOPJB
   v) /UserJB
   vi) /audit

User is unable to navigate to those pages and is redirected to the Home page.

5.4. Generating a Report

a) With any active User's credentials, login to the portal and navigate to the *HOME* page.
b) In the list of SOPs, change 5 SOPs to have a status of *Completed* and take note of the SOP's titles.
c) Click **Generate Report**.
The user is redirected to a PDF of a formal document listing the previously selected SOPs that have a status of Completed.

6. Security

6.1. Changes Access to SOPs

The features that the portal provides will change the way that employees within i4i access SOPs. They will no longer need to find their appropriate SOPs through the *bc* network drive. Instead, all SOP documents will be available through the portal in a more organized manner.

6.2. Replacing Manual Paperwork

Previously, employees were given paperwork to confirm that they have read all their assigned SOPs. The portal will replace the need to manually create paperwork for every employee. Instead, the reports will be automatically generated once the user has read all their required SOPs.

7. Migration/Backwards Compatibility

N/A

8. References

9. Definitions

Term	Definition
SOP	Standard Operating Procedure documents
General User	Users to the application that are a part of only these Job Roles: Business Dev, Project Manager, Dev Manager, Developer, QC Lead, QC Analyst, CS Manager, CS Staff, Documentation, QA, and IT.
Dev	Short term for Developer
QC	Quality Control Job Role
QA	Quality Assurance Job Role
CS	Client Services Job Role
IT	Information Technology Job Role

Audit Trail	The Audit Trail is a list containing the history of read SOPs for each User used for auditing purposes

10. Appendix