**Instructions for Accessing Prototype**

Important information:

- Website link/url: <https://zomer.dev/>

Accounts for testing:

- regular user account:

login: user@email.com

password: Password!1

- admin account:

login: admin@email.com

password: Password!1

Usage instructions:

Homepage:

Currently the homepage for the website does not have much. The UI will be improved as we near the end of the project.

This homepage can be accessed at any time by clicking the ‘Home’ text in the navigation section at the top of the screen.

Viewing contacts:

From the homepage click the blue button that reads “View Records”.

You may be prompted to log in. Use the ‘user account’ with the email and password shown at the top of this document.

Once you are logged in you can see a list of all of the current contacts that are being stored. This list will most likely be empty as we are still working on testing it. The top of the page will have large text that says “Index”.

Creating new contact:

To create a new contact, first ensure you are in the viewing contacts page (See Viewing contacts section for navigation instructions). This will take you to a form where you can enter the information about the contact you wish to add. When you are ready to add the contact, click the “Create” button at the bottom of the form. You should be brought back to the view contacts page and can now see the contact in the list of all contacts.

Editing contact:

Ensure you are in the viewing contacts page (See Viewing contacts section). Each contact in the list has 3 buttons attached to them (you may have to scroll to the right side of the page to see the buttons). Click the Edit button. This will bring you to a form similar to the Create contacts page. Here you can change any information about this contact like their address or phone number. When you are done making changes click the “Save” button to update this contact.

Deleting contact:

Ensure you are in the viewing contacts page (See Viewing contacts section). Scroll to the right side of the contact you wish to delete and click the “Delete” button. You may encounter an error page that displays an “Access Denied” error. If this happens it is because you are currently signed into the regular user account, who does not have the ability to delete records.

If this is the case, click the logout button at the top-right of the page. Then click the login button at the top-right and log in as the admin account shown at the top of this document.

Once logged in as the admin account, navigate back to the View records page. Click the delete button on the contact you wish to delete. This will bring you to a confirmation page with all of the information about the contact you wish to delete.

Scroll to the bottom and click the red “Delete” button. That contact is now deleted from the list of all contacts.

Uploading spreadsheet file:

**Warning –** Do not use any spreadsheet files that contain real contact information. This prototype is not secure meaning that contact information may be leaked. Use the ‘sample-excel.xlsx’ file provided in the email this is sent with instead.

Navigate to the homepage (click ‘Home’ at top-left of screen). Click the “Upload File” button. If you get an error about being denied access, log out of the user account and into the admin account (see Deleting contact section for more info). This is the only page that does not follow the style of the rest of the website. This will be changed later.

Click the “Browse…” button. This will bring up a window that will allow you to select a file to upload. Find the ‘sample-excel.xlsx’ file (provided in the email with these instructions), click the file, and click the ‘open’ button. Click the “Upload” button. Navigate back to the homepage (you will have to click the previous page button in your web browser until you are at the homepage). Navigate to the View records page and you will see the new records that have been uploaded.

There is currently no detection duplicate records being uploaded, so if you upload the same document multiple times there will be multiple records that have the same values. This will be changed later in the development process.

Changing User Permissions:

If you were being denied access to certain pages while logged in as the regular user account, this is where you can change what areas that account has access to. If you are logged in as the regular user account, click the “Logout” button at the top-right. Now click the “Login” button and log in as the admin account listed at the top of this document.

Click the “User Control” button at the top-left of the page. This page will list all accounts and the roles they have access to.

Each account can have multiple roles. Having a role will grant that user access to certain parts of the website. For example, if a user does not have the ‘delete’ role, they will not be able to delete any records from the list.

In the list of users there is one with the email “[user@email.com](mailto:user@email.com)”. This is the regular user account for testing. Click the “Details” button at the right side of the regular user. There will be 6 buttons, with one for each possible role an account can have. Clicking the buttons will add or remove a role from that user. This can only be accomplished by users with the ‘admin’ role. If you were not allowed access to a part of the website when logged in as the regular user, you can try adding the role by clicking one of the blue buttons with the “Add Role” text.

Try adding the delete role to the regular user, then sign out of the admin account and back into the user account. Now if you try to delete an item form the list of contacts, you should have permission.

Note: It is currently possible for the admin user to remove the ‘admin’ role from their own account. This will lock out access from the user control panel and will require manual intervention to fix. This will not be the case in the final version.