**CEIS**

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**1. SYSTEMS**

**1.1 LOGIN SYSTEM**

**System Functions**

pre login - take user input and search for company

login - get username and password input and compare it to encrypted database values

**1.2 ACCOUNT HEIRARCHY SYSTEM**

**Account Levels**

Level 0 - Developers / CEIS Owner

Level 1 - Administrators / Company Owner

Level 2 - Super Users / Company Technical Officer

Level 3 - User Account Access

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Table 1** | **Account Level** | | | |
| **Function Name** | **Super Admin** | **Admin** | **Super User** | **User** |
| Dashboard | yes | yes | yes | yes |
| CRUD Account - Super User/User | no | yes | yes | no |
| CRUD Position | no | yes | yes | no |
| Crud Department | no | yes | yes | no |
| Crud Group | no | yes | yes | no |
| Account Access Control | no | yes | no | no |
| CRUD Projects | no | yes | no | yes |
| CRUD Company | yes | no | no | no |
| CRUD Admin Account | yes | no | no | no |
| CRUD Licence | yes | no | no | no |
| Module Manager | yes | no | no | no |
| Complains Manager | yes | no | no | no |
| Other Functions | yes | no | no | no |

**1.3 MODULE MANAGER SYSTEM**

**Existing Modules** *- Implemented as of date / under development*

1. Doc Chart

2. Doc Builder

3. Doc Flow

4. Skid Builder

5. Process Builder

**Level 0 Access**

1. Developers can add / remove a Module

2. Super Admin can select which module(s) are accessible by a certain Company

**Level 1 Access**

1. Admins can access all modules that are active in their Company

2. Admins can assign specific modules exclusive to Users Only

**Level 2 Access**

1. No access to Modules

**Level 3 Access**

1. Users by Default has no Access to Modules

2. Users can only access Modules that were assigned to them.

**1.4 ADMINISTRATION SYSTEM**

**System Functions**

1. CRUD Accounts

2. CRUD Positions

3. CRUD Departments

4. Account Access Control

**Level 0 Access**

1. No Access to Administration

**Level 1 Access**

1. CRUD Accounts

2. CRUD Positions

3. CRUD Departments

4. Account Access Control

**Level 2 Access**

1. CRUD Accounts

2. CRUD Positions

3. CRUD Departments

**Level 3 Access**

1. No Access

**System Restrictions**

1.1 Admin can only create Super Users and Users

1.2 Admin need to send a request to create another Admin Account in the Company to Super Admins. (Not Implemented yet)

1.3 Super User can only create User

1.4 Only Admin has access to Account Access Control.

**1.5 GROUP SYSTEM**

**System Functions**

1. Will Act as Industry. (Not Implemented yet)

2. Groups will act as a sorting medium for all documents/projects/templates made within company

**System Access**

1. Local Access - Free Access from Account Levels 1 - 3.

**1.6 PROJECT SYSTEM**

**System Functions**

1. Project Sharing - Project Owner can share the project to multiple people for viewing.

2. Project Preferences - View Edit Project Preferences.

3. Project Connect - Connect Actual Documents and Planning Documents into the project.

**Level 0 and Level 2 Access** (Super Admin and Super User)

1. No Access to Projects

**Level 1 and Level 3 Access** (Admin and User)

1. CRUD Project

2. Project Sharing

3. Project Preferences

4. Project Connect

**2. MODULES**

**2.1 Module Universal Access**

**Level 0 and Level 2 Access**

1. No Access to Modules

**Level 1 Access**

1. Assigned Access by Super Admin

**Level 3 Access**

1. Assigned Access by Admin

**2.2. Doc Chart - See Brijesh Files**

**2.3. Doc Builder**

**2.3.1** **Module Functions**

**Define Document**

1. Four (4) Categories with nine (9) editable Subcategories

**Upload New Document**

1. Uploads a new Document

2. Takes four-digit combination of selected Category from Define Document as prefix of Document ID

**Build New Doc**

1. Creates a template and layout of a document. (Not Implemented yet)

2. will also create a document. (Not Implemented yet)

**Documents**

1. View Account Documents

2. View status

3. Check-in new version

4. Edit properties

5. Checkout selected document

**Send to Docflow**

1. Checked in Documents will be sent to Doc Flow Module.

**2.3.2 Module Restrictions**

**Document Check-in**

1. only Owner of Document can check-in a new version

2. only certain file formats are allowed. (docx, xlsx, pdf) - Implemented as of date / under development

3. must complete check-in directions in order to save/upload data.

4. automatically on Draft Stage upon check-in.

**Documents Search**

1. Search by Single Category - Implemented as of date

2. Search by Multiple Category - Implemented as of date

3. Search by Project ID/ Document ID/ Owner ID - under development

4. Advanced Search - under development

**2.4. Doc Flow**

**2.4.1** **Module Functions**

**Dashboard**

1. View Stages active and inactive Documents

2. Click to redirect to selected page

**Doc Flow Manager**

1. Document Stages Pages (Proofread, Review, Approve, Post Approve)

2. Checkout selected document

3. Check-in with notes regarding selected action (Approve / Reject)

4. Approve/Reject with reason regarding selected action (Approve / Reject)

**My Docs**

1. View Account Documents under Stages

2. Check-in new Version of selected Document

3. Update Properties of selected Document

4. Checkout selected Document

**2.4.2 Module Restrictions**

**Doc Flow Manager**

1. Check-in Multiple times - only the newest document will be saved.

2. Approve/Reject only if Account has checked in with notes at least once

3. Approve/Reject can only do Action once per check-in.

4. if Approved by all Director (Proofreaders/Reviewer/Approver/Post Approver). then Document may go to next Stage.

5. if rejected by at least one Director (Proofreaders/Reviewer/Approver/Post Approver). then Document needs to be checked in 1 version to try again.

**2.5. Skid Builder** - Under Development

**5.1 Module Functions**

**Units**

1. CRUD Units

2. CRUD Subunits

**Equipment**

CRUD Equipment

CRUD Sub Equipment

**Skid**

Drag and Drop to main Skid.

**2.6. Process Builder** - Under Development