Description

1. **Cloud-Based Platform**: Provides seamless access to data, tools, and reports from any location, enabling businesses to manage health, safety, and compliance remotely.
2. **Fire Safety Management**: Includes comprehensive tools for conducting fire risk assessments, inspections, and audits, ensuring all safety protocols are met.
3. **Risk Assessment & Management**: Allows users to assess various types of risks, identify hazards, and create action plans to mitigate them.
4. **Property Surveys & Audits**: Facilitates detailed property surveys, including condition assessments and compliance checks, with customizable templates.
5. ***Automated Compliance Workflows****: Automatically schedules inspections, audits, and report generation to ensure compliance tasks are completed on time.*
6. **Mobile Accessibility**: Empowers field teams to perform inspections, audits, and surveys on the go, using mobile devices to access real-time data and submit reports.
7. **Real-Time Data & Reporting**: Offers real-time data collection and analysis, with instant reporting capabilities to generate insights and performance metrics.
8. **Customizable Templates & Reports**: Users can create and modify templates for surveys, risk assessments, and reports, tailored to their specific operational needs.
9. ***Data Analytics & Insights****: Provides in-depth analytics to track trends, assess performance, and make informed decisions based on data-driven insights.*
10. ***Task & Maintenance Tracking****: Helps organizations track maintenance tasks, assign responsibilities, and monitor the progress of compliance-related activities.*
11. **Multi-User Collaboration**: Supports collaboration among different teams, allowing multiple users to access, share, and update data simultaneously.
12. **Bespoke Reporting**: Generates personalized reports that can be customized to meet specific regulatory and operational requirements.
13. **Regulatory Compliance Support**: Ensures that all processes, assessments, and reports align with industry-specific regulatory standards.
14. **Scalable & Flexible**: The platform is scalable to meet the needs of small businesses or large enterprises, with flexible features that can adapt to various industries and regulatory environments.
15. **Offline Access & Sync**: Allows users to conduct surveys and inspections offline and sync data once they regain internet connectivity.

Features

1. Company Management
2. Client Management
3. Calendar Scheduling
4. Assessment Templates Creation
5. Generate Report
6. User Management
7. Subscription
8. Notifications and Reminders

### **1. Company Management Workflow**

* **Step 1: Add New Company**
  + Admin logs into the portal and navigates to the "Company Management" section.
  + Selects "Add New Company."
  + Fills in company details, including name, address, industry type, contact information, and any additional metadata.
  + Clicks "Save," and the company is added to the system.
* **Step 2: Assign Permissions**
  + Once a company is created, the admin assigns role-based access permissions to various team members (e.g., managers, assessors, team members, field agents, compliance staff, compliance officers).
  + Team members receive invitations to access the portal and set up their accounts.
  + Team member can be associated with specific assessments, tasks, or roles within the company.
* **Step 3: Manage Company Data**
  + Admin can update company information, view associated assessments, and generate reports.
  + Audit logs track changes and activity for transparency and accountability.
* **Step 4: Staff Management**
  + Adding, updating, and managing staff details for company. Include:
  + Staff contact details
  + Role assignments
  + Task or project allocations
* **Step 5: Delete or Archive Company**
  + When necessary, the admin can archive or delete a company profile from the system. Archived companies remain accessible for reference but cannot be modified.

### **2. Client Management Workflow**

* **Step 1: Add New Client**
  + Navigate to the "Client Management" section.
  + Click "Add New Client" and enter details such as name, address, contact information, and assigned company.
  + Click "Save" to store the client profile.

### **3. Calendar Scheduling Workflow**

* **Step 1: Access Calendar**
  + Users navigate to the "Calendar" section in the web portal, where they can view all upcoming tasks, assessments, and maintenance schedules.
  + The calendar can be filtered by company, client, or assessment type.
* **Step 2: Schedule New Assessment or Task**
  + Select the date for the assessment or task.
  + Add relevant details, including assigned personnel, location, and any specific instructions.
  + Set notifications and reminders for users involved.
* **Step 3: Approve and Notify**
  + Once scheduled, the system sends automatic notifications and reminders to assigned users.
  + The event is visible on the dashboard of all involved parties.
* **Step 4: Sync with Other Tools**
  + The portal can integrate with an external calendar tool (Google Calendar) to keep schedules synchronized.

### **4. Assessment Templates Creation Workflow**

* **Step 1: Navigate to Templates Section**
  + Admin or authorized users access the "Assessment Templates" section.
  + Click "Create New Template."
* **Step 2: Customize Template**
  + Add fields for risk assessment, property survey, compliance checks, or fire safety audits.
  + Use pre-built templates or create custom fields (text inputs, checkboxes, dropdowns, pictures) for specific industry needs.
  + Add instructions, scoring mechanisms, and guidelines for assessors.
* **Step 3: Save and Publish Template**
  + Save the template for use across multiple assessments.
  + Assign the template to specific companies, clients, or projects.
  + Make the template available to assessors in the field via mobile access.
* **Step 4: Manage and Update Templates**
  + Authorized users can edit or update existing templates as regulations change or company needs evolve.
  + Archive outdated templates while maintaining historical data integrity.

### **5. Generate Report Workflow**

* **Step 1: Select Assessment for Reporting**
  + Navigate to the "Reports" section in the portal.
  + Select the completed assessment or series of assessments for which the report needs to be generated.
* **Step 2: Customize Report Fields**
  + Choose the format and layout of the report (PDF).
  + Add or remove specific sections, such as risk analysis, recommendations, and compliance status.
  + Insert graphs, images, or annotations to highlight critical data points.
* **Step 3: Review and Finalize Report**
  + Preview the report to ensure accuracy.
  + Add any additional comments or summaries needed for stakeholders.
* **Step 4: Distribute Report**
  + Once finalized, the report can be downloaded, emailed to clients, or stored in the portal for future reference.
  + Set permissions to control who can view or edit the report.

### **6. User Management Workflow**

* **Step 1: Add New User**
  + Admin navigates to the "User Management" section and selects "Add New User."
  + Company will have Ability to add staff members under a company profile
  + Enter the user’s details (name, email, role, etc.), assign them to a specific company or client, and define their access level.
* **Step 2: Assign Roles and Permissions**
  + Set role-based permissions (admin, assessor, manager) to control access to different sections of the portal.
  + Specify what actions the user can take (view, edit, delete, create).
* **Step 3: Send Invitation and Setup**
  + The new user receives an invitation to set up their account.
  + They can log in, update their profile, and access the features based on their assigned role.
* **Step 4: Manage Active Users**
  + Admins can view all active users, update permissions, reset passwords, and deactivate users as needed.
  + Activity logs track user actions for compliance and security purposes.

### **7. Subscription Workflow**

* **Step 1: Select Subscription Plan**
  + Users navigate to the "Subscription" section to view available plans (pay as you go,monthly, annual, enterprise etc.).
  + Each plan details the available features, usage limits, and pricing.
* **Step 2: Choose Plan and Payment Method**
  + Select the desired plan based on the company’s needs.
  + Enter billing information and choose a preferred payment method (Stripe).
* **Step 3: Confirmation and Activation**
  + Once payment is processed, the subscription plan is activated, and the user receives a confirmation email.
  + The portal adjusts features and limits according to the selected plan (e.g., number of users, access to specific modules).
* **Step 4: Manage Subscription**
  + Users can view their subscription status, upgrade or downgrade their plan, and update billing information from the "Subscription" section.
  + Automated reminders notify users when their subscription is due for renewal.

### **Notification and Reminder Workflow**

**Step 1: Trigger Event**

* A notification or reminder is triggered by specific actions or events, such as:
  + New assessment scheduled.
  + Upcoming deadline for a task or report.
  + Subscription renewal approaching.
  + User actions like completing an assessment or updating information.

**Step 2: Notification Creation**

* The system automatically generates a notification or reminder based on the trigger.
* Notification includes relevant details (e.g., assessment date, task deadline, report ready for review).

**Step 3: Delivery**

* Notifications or reminders are sent via selected channels:
  + Email to registered users.
  + In-app notifications (visible on the user dashboard).
  + Push notifications on mobile devices, if applicable.

**Step 4: User Acknowledgment**

* Users receive the notification and can click on it to view more details or take action.
* Once acknowledged, the notification is marked as "read" or "completed" within the system.

### **My Template Workflow**

**Step 1: Access My Template**

* Users navigate to the "My Template" section in the portal.
* View a list of templates they have created, saved, or modified.
* Templates are organized by categories (e.g., Risk Assessment, Property Survey, Fire Safety Audit).

**Step 2: Create a New Template**

* Click "Create New Template."
* Add template details (name, category, description).
* Customize template fields (e.g., text inputs, checkboxes, dropdowns, pictures).
* Save the template to "My Template" with a unique identifier.

**Step 3: Modify Existing Template**

* Select a template from "My Template."
* Edit template fields, layout, or other configurations.
* Save changes as a new version or overwrite the existing version.

**Step 4: Delete or Archive Template**

* Users can delete or archive templates they no longer need.
* Archived templates remain accessible for reference but cannot be modified.
* Deleted templates are removed permanently from the system.

#### **Template Center Workflow**

**Step 1: Access Template Center**

* Users navigate to the "Template Center" section in the portal.
* View a library of pre-created templates added by Admin or Company.
* Templates are displayed with descriptions and usage instructions.

**Step 2: Search and Filter Templates**

* Use search functionality to find templates by name or category.
* Apply filters (e.g., Risk Assessment, Fire Safety) to narrow down results.

**Step 3: Save Template to My Template**

* Select a template from the Template Center.
* Click "Save to My Template."
* The template is copied to the "My Template" section for user customization.

**Step 4: Modify Saved Template**

* Access the saved template in "My Template."
* Make changes to fields, layout, or other settings as desired.
* Save changes to create a customized version.

#### **Admin Workflow for Template Management**

**Step 1: Add New Template to Template Center**

* Admin logs into the portal and navigates to the "Template Center Management" section.
* Click "Add New Template."
* Fill in template details (name, category, description, fields, and guidelines).
* Publish the template to make it available in the Template Center.

**Step 2: Edit Existing Templates**

* Admin can edit templates in the Template Center as regulations or needs evolve.
* Updated templates are automatically available to all users (with notification).

**Step 3: Archive or Delete Templates**

* Admin can archive templates to retain historical data while removing them from active use.
* Deleted templates are permanently removed from the system.

## **Mobile App - Features**

### **1. Mobile User Login Workflow**

* **Step 1: Open Mobile App**
  + Users launch the mobile app and are presented with a login screen.
* **Step 2: Enter Credentials**
  + Users input their email/username and password.
  + Option to enable biometrics (fingerprint or facial recognition) for faster login in future sessions.
* **Step 3: Authentication**
  + The app verifies the credentials with the cloud-based platform.
  + If authentication is successful, the user is directed to the dashboard.
  + If authentication fails, an error message is shown, and users are prompted to retry or reset their password.
* **Step 4: Dashboard View**
  + After a successful login, users access the main dashboard where they can see upcoming assessments, tasks, notifications, and pending reports.

### **2. Mobile Field Assessment Workflow**

* **Step 1: Access Assigned Assessments**
  + Users log in and navigate to the "My Assessments" section.
  + The app displays a list of scheduled assessments, which can be filtered by date, location, or client.
* **Step 2: Select an Assessment**
  + Users select the relevant assessment and are presented with the details, including location, type, and any specific instructions.
  + The assigned assessment template is automatically loaded for the user.
* **Step 3: Perform Assessment**
  + Users fill out the assessment form on-site using the mobile app.
  + They can input data using text fields, checkboxes, dropdowns, and image capture for visual documentation.
  + Users can also attach additional comments or notes as needed.
* **Step 4: Submit Assessment**
  + Once the assessment is completed, the user submits the form directly via the app.
  + The assessment is synced with the cloud platform, and notifications are sent to relevant stakeholders for review.
* **Step 5: Offline Mode (if applicable)**
  + If the user is working in an area with no connectivity, the app stores the data locally.
  + Once the user regains internet access, the app automatically syncs the completed assessment with the cloud.

### **3. Mobile Task Management Workflow**

* **Step 1: View Tasks**
  + Users navigate to the "Tasks" section where they can see a list of assigned tasks, including upcoming inspections, maintenance jobs, or follow-up actions.
  + Tasks can be filtered by due date or priority.
* **Step 2: Update Task Progress**
  + Users click on a task to view detailed instructions and update the task’s status (e.g., "In Progress," "Completed").
  + Task updates are saved and synced with the cloud, providing real-time visibility to team members and managers.
* **Step 3: Add Comments or Attachments**
  + Users can attach images, videos, or add comments related to the task for better documentation.
* **Step 4: Mark Task as Completed**
  + Once a task is finished, users mark it as completed in the app.
  + The task status is updated across the platform, and notifications are sent to relevant team members.

### **4. Mobile Notifications and Alerts Workflow**

* **Step 1: Receive Notification**
  + Users receive push notifications on their mobile device for events like:
    - Upcoming assessments or tasks.
    - Submission confirmation of assessments.
    - System alerts such as policy updates, compliance deadlines, or task reminders.
* **Step 2: View Notification**
  + Users can tap on the notification to view more details directly within the app.
* **Step 3: Take Action**
  + Based on the notification, users can take immediate action, such as starting an assessment, reviewing a report, or updating a task.
* **Step 4: Acknowledge Notification**
  + Once the notification has been reviewed or acted upon, it is marked as “read” or “completed” in the app.

### **5. Mobile Report Access and Sharing Workflow**

* **Step 1: Access Completed Assessments**
  + Users can navigate to the "Completed Assessments" section in the app.
  + They select the assessment for which they need to generate a report.
* **Step 2: Generate Report**
  + Users tap on the "Generate Report" button to create a formatted PDF report based on the completed assessment data.
* **Step 3: Customize Report**
  + Before finalizing the report, users can add comments or select specific sections of the report to include or exclude.
  + They can also attach additional files such as photos or videos taken during the assessment.
* **Step 4: Share Report**
  + Once the report is ready, users can share it via email directly from the app, or save it to their mobile device for further distribution.
  + The report is automatically synced with the cloud portal for organizational record-keeping.

### **6. Mobile User Profile and Settings Workflow**

* **Step 1: Access Profile Settings**
  + Users navigate to the "Profile" section in the app to view and update their personal information.
  + Any changes are synced with the cloud system and updated across all platforms.
* **Step 3: Log Out**
  + Users can log out from the app, and the session is terminated for security purposes.

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## **Workflow Charts**











