





## Authorized user

The user is the day-to-day staff member who has an interest in the report files uploaded in the system or has a role in the monitoring and implementation of recommendations from these report files. The user can have various level of access given the sensitivity of the material hosted by the system.

The user should be able to access the following functionalities:

- Filtering
- Knowledge mapping
- Contextualizing
- Spotlight on recommendations "similarity"
- Export

All users should have an equal access right to these functionalities. It will be difficult to segment access based on reports.

It is possible to expand the similarity functionality to integrate specific information about recommendations, including status of implementation and actions track records. This functionality can eventually provide all information available related to a recommendations without providing the right to change or entry data. This functionality upgrade should be discussed during phase 2 of the project.

## Drafter

Drafter is the author of the report file. Drafter is responsible to ensure that the report file comply with reporting standards and to upload the report file into MINSIGHT.

His/her main tasks are the following:

- Apply the reporting guidelines during the drafting to ensure format compatibility with the system.
- Upload the report file into the system and file the form, providing the necessary information.
- Validate the pre-classified recommendations extracted by confirming explicit recommendations by "Yes" or "No" .
- Provide confidentiality level and guidance on access to recommendations management by other offices/units.
- Remain available to provide further information to the technical administrator or manager.

## Application manager

The manager has a substantive role in the supervision and coordination of the application. Manager knows the process workflow from uploading a new report file to the follow-up of a recommendation, including the distribution of recommendations to various work streams and consultation with teams. More specifically, he/she will be responsible for the management of recommendations and the overall substantive functioning of the system, including the recommendations common depository. His/her main responsibilities are the following:

- Coordinate with the drafter if there are missing information about the new file.
- Manage the recommendations common depository by manually validating recommendations (only for files pre-MINSIGHT and files not uploaded directly by drafters) and fusing recommendations that are similar (>75%).
- Complete recommendations if there are missing information for proper processing.
- (in coordination with technical admin) Manage access request and user/group privileges, including related to recommendations update and follow-up.

When a recommendation is ready for implementation:

- Provide a work stream to each recommendations and distribute follow-up as per the report file and guidance of the drafter.
- Update or supervise entry update by others on the status of the recommendations.
- Track actions.

A dedicated recommendations management interface should be developed. Some information from this interface might be accessible by users and WS Group.

## Technical Admin

To be further developed based on final technical requirements for maintenance and operations.

This should be done during the second phase of the project.

## Work stream group

Work Stream Group is managed by the application manager. Manager has assigned roles with a set of privileges to the group for a workflow item ("recommendation"). The group has a responsibility to follow-up and ensure implementation of recommendations.

The group:

- provide update on recommendations
- propose adjustments to manager

This part of the workflow relates directly to the interoperability between work streams. Further testing and piloting is required to ensure the possibility of have a direct technological interaction (transfer of recommendations) and sync various workflows together.

In this context, CPAS recommendations (15) were integrated, as a proof of concept, into MINSIGHT. It will be interested in the second phase to transfer MINSIGHT recommendations to CPAS for implementation.