**Test Cases: Diagnostic Assessment Tools Portal**

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| Test Case | Diagnostic Assessment Tools Portal | | |
| Module Name: |  | Tester: |  |
| Process Description (Objective): | Testing the revamped Tools portal and all modules | Date |  |

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| **Use Case 1** | User must be able to **register account** on the tools website | |
| **Pre-Conditions:** | User is registered with a valid SEDA email on SEDA | |
| **Post-Conditions:** | The user has successfully registered account and is activated on the tools website | |
|  | **ACTION** | **EXPECTED RESULT** |
| 1. Open browse and type in the following address: [http://](http://applications.seda.local) http://10.64.0.112:82 | SEDA tools website Login page will be displayed |
| 1. On the Login form displayed, Click the “[Register here if you do NOT have an account](http://localhost:63124/seda_tools/RegisterAccount.aspx?mode=0)” link to open the user registration form |  |
| 1. Complete the form as necessary and submit |  |
| 1. An email will be sent to the specified valid SEDA email of the user | Email received by user from the [tools@seda.org.za](mailto:tools@seda.org.za) email |
| 1. Click on the “Confirm registration” link on the email | The tools website confirmation form will be opened confirming the user has been registered and activated |
| **Comment:** |  | |

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| **Use Case 2** | User must be able to **reset password** if forgotten or when necessary | |
| **Pre-Conditions:** | User account is registered and ACTIVE on the tools website | |
| **Post-Conditions:** | User has successfully modified password details | |
|  | **ACTION** | **EXPECTED RESULT** |
| 1. Open browse and type in the following address: [http://](http://applications.seda.local) http://10.64.0.112:82 | SEDA tools website Login page will be displayed |
| 1. On the Login form displayed, Click the “Forgot Password” link to open the password re-set form |  |
| 1. Complete the form as necessary and submit | New email details submitted, confirmation message will be displayed |
| 1. An email will ALSO be sent to the specified valid SEDA email notifying user of the password changes | Email received by user from the [tools@seda.org.za](mailto:tools@seda.org.za) email |
| **Comment:** |  | |

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| **Use Case 3** | User must be able to **LOGIN to** the SEDA tools website | |
| **Pre-Conditions:** | User account is registered and ACTIVE on the tools website | |
| **Post-Conditions:** | User has successfully modified password details | |
|  | **ACTION** | **EXPECTED RESULT** |
| 1. Open browse and type in the following address: [http://](http://applications.seda.local) http://10.64.0.112:82 | SEDA tools website Login page will be displayed |
| 1. On the Login form displayed, supply the requested Email and password |  |
| 1. Click on “Sign In” link as indicated in illustration above | Tools home page will be displayed |
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| **Use Case 4** | User must be able to **view summary and details of clients** registered and/or assigned to them on the CRM | |
| **Pre-Conditions:** | User has registered clients associated with their account on the CRM | |
| **Post-Conditions:** | User has listed summary and details of individual clients that they can assess on the tools website | |
|  | **ACTION** | **EXPECTED RESULT** |
| 1. From the tools home page, click on the “View Clients Details” link | Clients summary list/search page will be displayed, initially with no data populated: |
| 1. Click on the “GO” button to list **ALL** clients associated with the user (note: do not supply anything in the search text boxes) | List of all clients registered by, or associated with the user are displayed: |
| 1. Search a specific client: supply all or part of the known details in the textboxes indicated (Surname, Firstname, ID number) and click “GO” | List of clients matching the entered pattern will be displayed: |
| 1. View details of client: On the displayed list, on the required client, Click the “Details …” field | Client details from will be displayed with details from SEDA CRM: |
| **Comment:** |  | |

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| **Use Case 5** | User must be able to view summary and details of businesses registered and/or associated to their assigned clients on the CRM | |
| **Pre-Conditions:** | User has registered businesses associated with their client-account on the CRM | |
| **Post-Conditions:** | User has listed summary and details of individual businesses that they can assess on the tools website | |
|  | **ACTION** | **EXPECTED RESULT** |
| 1. From the tools home page, click on the “View Business Details” link | Business summary List/Search page will be displayed, initially with no data populated: |
| 1. Click on the “GO” button to list **ALL** businesses associated with the user (note: do not supply anything in the search text boxes) | List of ALL businesses registered by, or associated with the user are displayed: |
| 1. Search a specific business: supply all or part of the known details in the textboxes indicated (Business Name, Owner/Client Name/Registration Number) and click “GO” | List of businesses matching the entered pattern will be displayed: |
| 1. View details of client: On the displayed list, on the required client, Click the “Details …” field | Business details from will be displayed with details from SEDA CRM: |
| **Comment:** |  | |

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| **Use Case 6** | User must be able to list, search and **view previous assessments** | |
| **Pre-Conditions:** | User has previous assessments done or accessible to them | |
| **Post-Conditions:** | User has successfully searched, listed and view assessments | |
|  | **ACTION** | **EXPECTED RESULT** |
| 1. On the tools home page, Click “ Assessments” link on the top-right (below logged user details) | Assessments list/search page will be displayed with all assessments listed according to the criteria:   1. All assessments that were done by the current user (if user is a B/A or Practitioner) 2. All assessments that were done by practitioners at a particular branch (If Branch manager) 3. All assessments that were done by practitioners in a particular province (If Provincial Manager) 4. All assessments done nationally (if National authority or System Administrator)   The criteria specification section will be on the left side of the form as indicated by arrow in the illustration below. |
| 1. Select the criteria required and Click the “Search” button. | All assessments matching criteria selected and specified will be displayed |
| 1. Click on the “Details…” field of the required assessment to view details | Selected assessment will be opened in the relevant assessment tool |
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| **Use Case 7** | User must be able carry out an assessment: **BUSINESS IDEA ASSESSMENT** | |
| **Pre-Conditions:** | User has required and valid assessment details and responses | |
| **Post-Conditions:** | User has successfully carried out an assessment | |
|  | **ACTION** | **EXPECTED RESULT** |
| 1. On the tools home page, Click “Business Idea Assessments” | Business Idea Assessment tool home page will be displayed, with list of all previous assessments done or accessible to the user: |
| 1. Click on the “New BIA Assessment” link as indicated in the illustration” | Business Idea Assessment form will be displayed as indicated below:  First, the new assessment will require the user to specify 2 (two) items related to the business that is being assessed: i.e   1. The client name 2. Business name |
| 1. Click on the “Client” combo box and select the required Client: | All ***clients assigned to current user and active on the SEDA CRM*** will appear on the list. Once required client is selected, all their registered business entities in the CRM will appear in the “Business” drop-down. |
| 1. Click on the “Business Name” drop-down to select required business that belongs to selected client (at the top) | Once Business is selected, a button labelled “Create Assessment” will appear on the right side. |
|  | 1. Click on the “Create Assessment” button to initialise the assessment | 1. If the assessment has been successfully initiated, a confirmation message(indicated by 1) will appear, replacing the “Create Assessment” button; and the assessment outline will be exposed 2. The “Assessment Outline” section (indicated by 2) contains links to all sub-sections of an assessment that will need to be completed before an assessment can be submitted (closed) 3. If a section is not yet completed by the user, it will be bulleted by a green circle () on the left side, whereas a completed section of the assessment will have a green tick mark () bullet. |
|  | 1. Click on the “Company Background” link to open and supply the company background. | A new form will be displayed overlaying the original assessment form; as indicated below.   * Supply the necessary company background details; and click the “Save” button to save. * Click the “Close Form” link at the bottom-right corner of the form to close it. * When the form refreshes next, a tick-mark bullet will replace the current circle bullet |
|  | 1. Click on the “Questionnaire” link to complete the questionnaire | Main questionnaire form will appear on the main working space.   * Click “Questionnaire” link as indicated below, to display the Questionnaire form if not already on the active screen * The top-most heading of the entire form must also indicate “Business Idea Assessment ..(Questionnaire)”      * Complete the questions and click the “Save” button at the bottom of the questionnaire * Confirmation message will be displayed at the bottom of the form if the save was successful. * A tick mark bullet will appear on the left of the “Questionnaire” link |
|  | 1. Click on Recommendations link to supply the assessment recommendations | The Recommendations form will be displayed overlaying the main working form area. At the top of the form will be the title of the company that is being assessed (indicated as 1)   * Supply the necessary recommendations in the content area provided * Click the “Save” button (indicated by 2) at the bottom of the recommendations typing area * Confirmation message will appear if the save was successful (indicated by 3) * Click the “Close” button to return to the main assessment form. |
|  | 1. Click on the “Action Plans” to supply the action plans details | The Action plans form will also appear as an independent for overlaying the main working form area as indicated in the illustration below.  The company being assessed will also appear at the top of the form (indicated by 1 in the illustration below)   * Supply each action plan in the spaces provided for Action Plan, Responsible Person, Start Date, End date * Click on the “Save” button on the right side of the content area(indicated by 2) to save the action plan * Once saved, the action plan will appear in a table below that appears at the bottom of the content-entry area * Click the “Close” button to close the action plans form     **To Edit Action plan:**   * Identify the action to be edited in the action plans list table * Select the action plan by clicking the “Edit…” link (indicated by 3 in illustration above) in the action plans table. The action plan will appear inside the data-entry text-boxes * Edit the action plan accordingly, and click the “Save” button * The amended action plan will re-appear in the action plans table with edited data reflected   **To Delete Action Plan:**   * Identify the action plan to be edited in the action plans list table * Click the “Delete” link button (indicated by 4 in the illustration) in the table alongside the action plan to be deleted * The action plan will disappear from the list |
|  | 1. Click “Online Report” link at the top-right corner menu to view the online report | User can always view the online report that is generated by the system automatically at any point after creating an assessment.  However, after all section are completed, the report will have all the content that will be printed for the final report.  To view the online report, click “Online Report” from the menu illustrated below (indicated as 1)    An overlaying form will be displayed as indicated in illustration below.   1. User can export the report into any of the indicated formats (PDF, EXCEL, MS WORD) 2. User can use the navigation page bar to move from 1 page of the report to the next 3. Click the “Close report” button to close the report and return to the main assessment area |
|  | 1. **SUBMIT assessment for Review by branch manager** | Once all sections up to “Action Plans” (excluding “Final Report”) are completed, the assessment will be ready to be sent to the branch manager for review.  NB: user can easily check if all relevant sections of the assessment are completed by check the bullets on the left side of the section menus. Green tick-mark bullets indicate the section has been attended to, while green disk bullets indicate the section is still pending.  An additional section labelled “**Assessment Review/Submit**” will be exposed below the “**Assessment Outline**” section, as indicated on the illustration below. |
|  | 10.1 Click the “Submit For Review” button to send a notification to the branch manager | The system will mark the assessment as “Pending Review”, and sends an email message to the branch manager; notifying them of the new assessment that requires a review.  Once the branch manager logs into the system, they will automatically be directed to a page that has a listing of all assessments that are due for reviews for their relevant branch. |
|  | **10.2 Review an assessment and provide feedback; or approve an assessment;** | This procedure only applies to branch managers (BM) or all other users with such authorisation levels i.e abobe the Business Advisor/Practitioner.  - When an assessment is submitted for review by the BA, the BM receives an email with all details of that assessment as shown below:  Good day  A new assessment/version has been submitted for review. Please log into the SEDA Tools to submit your feedback or approval.  Assessment Type: Business Idea Assessment Tool Assessment ID: 87800045 Client Name: Khanya Mkhangisa  Business name: Khanya Engineering  Assessment Date: 26/02/2019 03:21:40 PM Practitioner: Mathibidi Tsolofelo  Regards  SEDA Tools Team.   * When BM logs into the tools website, they are directed to an assessments’ list page that lists all assessments that have been submitted by users for reviews (for the specific branch .. in the case of Ms); as illustrated below      * Click on the “Details …” link of the corresponding assessment to go to the assessment details:   The system will navigate to the appropriate tool and open up the specified assessment:   * Click on the “Online Report” link (indicated as 1 on illustration below) to open a summary report of the assessment. Use this report to examine the assessment, and provide the feedback accordingly. Please note here that the BM can also open each section of the assessment to check the details, by using the menu links on the left side of the assessment. * Click on the “**Feedback**” link to open the feedback form as illustrated below:      * The “Feedback” link will navigate to the feedback form that will be displayed as illustrated below:      1. Feedback form heading 2. Feedback content area 3. Re-Work button – this will be used to submit feedback where the assessment needs to be polished by the BA 4. Approve button will be used after proving feedback content where the assessment is approved 5. Clear button is used to enter new feedback record 6. Feedback History – will list previous feedback sessions. 7. Exit Feedback button is used to exit feedback session  * If the assessment needs to be re-worked on by BA, Click “Re-Work”; otherwise click “Approve” if the assessment is acceptable.   The system will generate and forward a notification to the BA/Practitioner informing them of the MBs feedback |
|  | 10.1 Click the “Feedback” link to view BM’s feedback | Once a review has been done by the BM, the BA will receive an email notifying them of the event, with details of the assessment.  The BA will open the relevant tool and assessment, and click on the “Feedback” link too.  This will open the Feedback form, which will list all feedback sessions that have been provided by the BM (Ideally, the last session will provide the latest feedback review from the BM, and contains the latest suggestions (see illustration below)     * BA will have to re-work on the assessment as suggested in the feedback, and re-submit for review again. * The cycle will be repeated until the BM approves the assessment   If the assessment has been approved, the “Final Report” section will be displayed, as described next |
|  | 1. Specify “Final Report” | If the assessment has been approved, the “Final Report” section will be revealed which will solicit users to attach the final report to the assessment so it can be closed and “filed”     1. Final Report link will not be active at this point since the report has NOT yet been supplied 2. Click the “Choose File” button to open the file-dialog box and select the scanned, signed, final report   The selected report will appear as indicated on 4 in the illustration above   1. Click on the “Upload Final Report” link to upload the report to the SEDA central server   Once the final report is successfully uploaded, the assessment links will be displayed as indicated in illustrated  Ion below:   |  |  | | --- | --- | |  | As illustrated;   1. The “Final Report” link becomes an active link, which will open the uploaded final report of the current assessment when excited by a mouse-click. Also note that the green-coded disc bullet of the Final Report link is immediately replaced by the greed-coded tick-mark bullet 2. The final report can be replaced! “Report Saved” indicator shows that there has been a previously uploaded final report 3. Once the final report is uploaded, the assessment can finally be Submitted, and closed | |
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|  | 1. Click “Submit” from the “Submit Assessment” section to submit the assessment | In this stage, the practitioner will print the final online report, scan the document and attach to the assessment as the final report  The assessment will then be submitted, indicating that it has been finalised hence can be “filed”.   |  |  | | --- | --- | |  | * Click on the “Submit Assessment” link button as indicated (3). * An overlaying form will be displayed, which will solicit a confirmation if indeed the submission must be done: see illustration below. * Click the “Continue” button to confirm and the “Cancel” button to abandon submission.       Once the assessment has been submitted, the “Submit Assessment” button will display a message “Assessment Submitted” | |
| **Comments:** |  | |

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| **Use Case 8** | User must be able carry out an assessment: **PRE-STARTUP ASSESSMENT** | |
| **Pre-Conditions:** | User has required and valid assessment details and responses | |
| **Post-Conditions:** | User has successfully carried out an assessment | |
|  | **ACTION** | **EXPECTED RESULT** |
| 1. On the tools home page, Click “Pre-Startup” Assessments” | Pre-Startup Assessment tool home page will be displayed, with list of all previous assessments done or accessible to the user: |
| 1. Click on the “New P/S Assessment” link as indicated in the illustration” | Pre-Startup Assessment form will be displayed as indicated below:  First, the new assessment will require the user to specify 2 (two) items related to the business that is being assessed: i.e   1. Client Name 2. Business Name |
| 1. Click on the “Client” combo box and select the required Client: | All **clients assigned to current user and active on the SEDA CRM** will appear on the list. Once required client is selected, all their registered business entities in the CRM will appear in the “Business” drop-down. |
| 1. Click on the “Business Name” drop-down to select required business that belongs to selected client (at the top) | Once a business is selected, a button labelled “Create Assessment” will appear on the right side. |
|  | 1. Click on the “Create Assessment” button to initialise the assessment | 1. If the assessment has been successfully initiated, a confirmation message(indicated by 1) will appear, replacing the “Create Assessment” button; and the assessment outline will be exposed 2. The “Assessment Outline” section (indicated by 2) contains links to all sub-sections of an assessment that will need to be completed before an assessment can be submitted (closed) 3. If a section is not yet completed by the user, it will be bulleted by a green circle () on the left side, whereas a completed section of the assessment will have a green tick mark () bullet. |
|  | 1. Click on the “Company Background” link to open and supply the company background. | A new form will be displayed overlaying the original assessment form; as indicated below.   * Supply the necessary company background details; and click the “Save” button to save. * Click the “Close Form” link at the bottom-right corner of the form to close it. * When the form refreshes next, a tick-mark bullet will replace the current circle bullet |
|  | 1. Click on the “Questionnaire” link to complete the questionnaire | Main questionnaire form will appear on the main working space.   * Click “Questionnaire” link as indicated below, to display the Questionnaire form if not already on the active screen * The top-most heading of the entire form must also indicate “Pre-Startup Assessment .. (Questionnaire)”      * Complete the questions and click the “Save” button at the bottom of the questionnaire * Confirmation message will be displayed at the bottom of the form if the save was successful. * A tick mark bullet will appear on the left of the “Questionnaire” link |
|  | 1. Click on “Recommendations” link to supply the assessment recommendations | The “recommendations” form will be displayed overlaying the main working form area. At the top of the form will be the title of the company that is being assessed (indicated as 1)   * Supply the necessary recommendations in the content area provided * Click the “Save” button (indicated by 2) at the bottom of the recommendations typing area * Confirmation message will appear if the save was successful (indicated by 3) * Click the “Close” button to return to the main assessment form. |
|  | 1. Click on the “Action Plans” to supply the action plans details | The Action plans form will also appear as an independent for overlaying the main working form area as indicated in the illustration below.  The company being assessed will also appear at the top of the form (indicated by 1 in the illustration below)   * Supply each action plan in the spaces provided for Action Plan, Responsible Person, Start Date, End date * Click on the “Save” button on the right side of the content area(indicated by 2) to save the action plan * Once saved, the action plan will appear in a table below that appears at the bottom of the content-entry area * Click the “Close” button to close the action plans form     **To Edit Action plan:**   * Identify the action to be edited in the action plans list table * Select the action plan by clicking the “Edit…” link (indicated by 3 in illustration above) in the action plans table. The action plan will appear inside the data-entry text-boxes * Edit the action plan accordingly, and click the “Save” button * The amended action plan will re-appear in the action plans table with edited data reflected   **To Delete Action Plan:**   * Identify the action plan to be edited in the action plans list table * Click the “Delete” link button (indicated by 4 in the illustration) in the table alongside the action plan to be deleted * The action plan will disappear from the list |
|  | 1. Click “Online Report” link at the top-right corner menu to view the online report | User can always view the online report that is generated by the system automatically at any point after creating an assessment.  However, after all section are completed, the report will have all the content that will be printed for the final report.  To view the online report, click “Online Report” from the menu illustrated below (indicated as 1)    An overlaying form will be displayed as indicated in illustration below.   1. User can export the report into any of the indicated formats (PDF, EXCEL, MS WORD) 2. User can use the navigation page bar to move from 1 page of the report to the next 3. Click the “Close report” button to close the report and return to the main assessment area |
|  | 1. **SUBMIT assessment for Review by branch manager** | Once all sections up to “Action Plans” (excluding “Final Report”) are completed, the assessment will be ready to be sent to the branch manager for review.  NB: user can easily check if all relevant sections of the assessment are completed by check the bullets on the left side of the section menus. Green tick-mark bullets indicate the section has been attended to, while green disk bullets indicate the section is still pending.  An additional section labelled “**Assessment Review/Submit**” will be exposed below the “**Assessment Outline**” section, as indicated on the illustration below. |
|  | 10.1 Click the “Submit For Review” button to send a notification to the branch manager | The system will mark the assessment as “Pending Review”, and sends an email message to the branch manager; notifying them of the new assessment that requires a review.  Once the branch manager logs into the system, they will automatically be directed to a page that has a listing of all assessments that are due for reviews for their relevant branch. |
|  | 10.2 Review an assessment and provide feedback; or approve an assessment; | **This procedure only applies to branch managers (BM) or all other users with such authorisation levels i.e abobe the Business Advisor/Practitioner.**  **- When an assessment is submitted for review by the BA, the BM receives an email with all details of that assessment** as shown below:  Good day  A new assessment/version has been submitted for review. Please log into the SEDA Tools to submit your feedback or approval.  Assessment Type: Business Idea Assessment Tool Assessment ID: 87800045 Client Name: Khanya Mkhangisa  Business name: Khanya Engineering  Assessment Date: 26/02/2019 03:21:40 PM Practitioner: Mathibidi Tsolofelo  Regards  SEDA Tools Team.   * When BM logs into the tools website, they are directed to an assessments’ list page that lists all assessments that have been submitted by users for reviews (for the specific branch .. in the case of Ms); as illustrated below      * Click on the “Details …” link of the corresponding assessment to go to the assessment details:   The system will navigate to the appropriate tool and open up the specified assessment:   * Click on the “Online Report” link (indicated as 1 on illustration below) to open a summary report of the assessment. Use this report to examine the assessment, and provide the feedback accordingly. Please note here that the BM can also open each section of the assessment to check the details, by using the menu links on the left side of the assessment. * Click on the “Feedback” link to open the feedback form as illustrated below:      * The “Feedback” link will navigate to the feedback form that will be displayed as illustrated below:      1. Feedback form heading 2. Feedback content area 3. Re-Work button – this will be used to submit feedback where the assessment needs to be polished by the BA 4. Approve button will be used after proving feedback content where the assessment is approved 5. Clear button is used to enter new feedback record 6. Feedback History – will list previous feedback sessions. 7. Exit Feedback button is used to exit feedback session  * If the assessment needs to be re-worked on by BA, Click “Re-Work”; otherwise click “Approve” if the assessment is acceptable.   The system will generate and forward a notification to the BA/Practitioner informing them of the MBs feedback |
|  | 10.1 Click the “Feedback” link to view BM’s feedback | Once a review has been done by the BM, the BA will receive an email notifying them of the event, with details of the assessment.  The BA will open the relevant tool and assessment, and click on the “Feedback” link too.  This will open the Feedback form, which will list all feedback sessions that have been provided by the BM (Ideally, the last session will provide the latest feedback review from the BM, and contains the latest suggestions (see illustration below)     * BA will have to re-work on the assessment as suggested in the feedback, and re-submit for review again. * The cycle will be repeated until the BM approves the assessment   If the assessment has been approved, the “Final Report” section will be displayed, as described next |
|  | 1. Upload the “Final Report” | If the assessment has been approved, the “Final Report” section will be revealed which will solicit users to attach the final report to the assessment so it can be closed and “closed and filed”     1. Final Report link will not be active at this point since the report has NOT yet been supplied 2. Click the “Choose File” button to open the file-dialog box and select the scanned, signed, final report   The selected report will appear as indicated on 4 in the illustration above   1. Click on the “Upload Final Report” link to upload the report to the SEDA central server   Once the final report is successfully uploaded, the assessment links will be displayed as indicated in illustrated  Ion below:   |  |  | | --- | --- | |  | As illustrated;   1. The “Final Report” link becomes an active link, which will open the uploaded final report of the current assessment when excited by a mouse-click. Also note that the green-coded disc bullet of the Final Report link is immediately replaced by the greed-coded tick-mark bullet 2. The final report can be replaced! “Report Saved” indicator shows that there has been a previously uploaded final report 3. Once the final report is uploaded, the assessment can finally be Submitted, and closed | |
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|  | 1. Click “Submit” from the “Submit Assessment” section to submit the assessment | In this stage, the practitioner will print the final online report, scan the document and attach to the assessment as the final report  The assessment will then be submitted, indicating that it has been finalised hence can be “filed”.   |  |  | | --- | --- | |  | * Click on the “Submit Assessment” link button as indicated (3). * An overlaying form will be displayed, which will solicit a confirmation if indeed the submission must be done: see illustration below. * Click the “Continue” button to confirm and the “Cancel” button to abandon submission.       Once the assessment has been submitted, the “Submit Assessment” button will display a message “Assessment Submitted” | |
| **Comments:** |  | |

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| **Use Case 9** | User must be able carry out an assessment: **ENTREPRENEURIAL DIAGNOSTICS** | |
| **Pre-Conditions:** | User has required and valid assessment details and responses | |
| **Post-Conditions:** | User has successfully carried out an assessment | |
|  | **ACTION** | **EXPECTED RESULT** |
| 1. On the tools home page, Click “Entrepreneurial Diagnostic Assessments” | Entrepreneurial Diagnostic Assessment tool home page will be displayed, with list of all previous assessments done or accessible to the user: |
| 1. Click on the “New EDT Assessment” link as indicated in the illustration” | Entrepreneurial Diagnostic Assessment(EDT) form will be displayed as indicated below:  First, the new assessment will require the user to specify 2 (two) items related to the business that is being assessed: i.e   1. The client name 2. Business name |
| 1. Click on the “Client” combo box and select the required Client: | All **clients assigned to current user and active on the SEDA CRM** will appear on the list. Once required client is selected, all their registered business entities in the CRM will appear in the “Business” drop-down. |
| 1. Click on the “Business Name” drop-down to select required business that belongs to selected client (at the top) | Once Business is selected, a button labelled “Create Assessment” will appear on the right side. |
|  | 1. Click on the “Create Assessment” button to initialise the assessment | 1. If the assessment has been successfully initiated, a confirmation message(indicated by 1) will appear, replacing the “Create Assessment” button; and the assessment outline will be exposed 2. The “Assessment Outline” section (indicated by 2) contains links to all sub-sections of an assessment that will need to be completed before an assessment can be submitted (closed) 3. Note here that the EDT has a 2-part questionnaire, indicated as SECTION 01 and SECTION 02. Both will have to be completed 4. If a section is not yet completed by the user, it will be bulleted by a green circle () on the left side, whereas a completed section of the assessment will have a green tick mark () bullet. |
|  | 1. Click on the “Company Background” link to open and supply the company background. | A new form will be displayed overlaying the original assessment form; as indicated below.   * Supply the necessary company background details; and click the “Save” button to save. * Click the “Close” button at the bottom-right corner of the form to close it. * When the form refreshes next, a tick-mark bullet will replace the current circle bullet |
|  | 1. Click on the “Questionnaire [SECTION 01]” link to complete the first part of the questionnaire | * Section 01 of the questionnaire will appear on the main working space. * The top-most heading of the entire form must also indicate “Entrepreneurial Diagnostic Tool (Section 01)”      * Complete the questions and click the “Save” button at the bottom of the questionnaire * Confirmation message will be displayed at the bottom of the form if the save was successful. * A tick mark bullet will appear on the left of the “Questionnaire [SECTION 01]” link |
|  | 1. Click on the “Questionnaire [SECTION 02]” link to complete the second part of the questionnaire | 1. Section 02 of the questionnaire will appear on the main working space. 2. The top-most heading of the entire form must also indicate “Entrepreneurial Diagnostic Tool (Section 02)”      * Complete the questions and click the “Save” button at the bottom of the questionnaire * Confirmation message will be displayed at the bottom of the form if the save was successful. * A tick mark bullet will appear on the left of the “Questionnaire [SECTION 02]” link |
|  | 1. Click on “Recommendations” link to supply the assessment recommendations | The Recommendations form will be displayed overlaying the main working form area. At the top of the form will be the title of the company that is being assessed (indicated as 1)   * Supply the necessary recommendations in the content area provided * Click the “Save” button (indicated by 2) at the bottom of the recommendations typing area * Confirmation message will appear if the save was successful (indicated by 3) * Click the “Close” button to return to the main assessment form. |
|  | 1. Click on the “Action Plans” to supply the action plans details | The Action plans form will also appear as an independent for overlaying the main working form area as indicated in the illustration below.  The company being assessed will also appear at the top of the form (indicated by 1 in the illustration below)   * Supply each action plan in the spaces provided for Action Plan, Responsible Person, Start Date, End date * Click on the “Save” button on the right side of the content area(indicated by 2) to save the action plan * Once saved, the action plan will appear in a table below that appears at the bottom of the content-entry area * Click the “Close” button to close the action plans form     **To Edit Action plan:**   * Identify the action to be edited in the action plans list table * Select the action plan by clicking the “Edit…” link (indicated by 3 in illustration above) in the action plans table. The action plan will appear inside the data-entry text-boxes * Edit the action plan accordingly, and click the “Save” button * The amended action plan will re-appear in the action plans table with edited data reflected   **To Delete Action Plan:**   * Identify the action plan to be edited in the action plans list table * Click the “Delete” link button (indicated by 4 in the illustration) in the table alongside the action plan to be deleted * The action plan will disappear from the list |
|  | 1. Click “Online Report” link at the top-right corner menu to view the online report | User can always view the online report that is generated by the system automatically at any point after creating an assessment.  However, after all section are completed, the report will have all the content that will be printed for the final report.  To view the online report, click “Online Report” from the menu illustrated below (indicated as 1)    An overlaying form will be displayed as indicated in illustration below.   1. User can export the report into any of the indicated formats (PDF, EXCEL, MS WORD) 2. User can use the navigation page bar to move from 1 page of the report to the next 3. Click the “Close report” button to close the report and return to the main assessment area |
|  | 1. **SUBMIT assessment for Review by branch manager** | Once all sections up to “Action Plans” (excluding “Final Report”) are completed, the assessment will be ready to be sent to the branch manager for review.  NB: user can easily check if all relevant sections of the assessment are completed by check the bullets on the left side of the section menus. Green tick-mark bullets indicate the section has been attended to, while green disk bullets indicate the section is still pending.  An additional section labelled “**Assessment Review/Submit**” will be exposed below the “**Assessment Outline**” section, as indicated on the illustration below. |
|  | 10.1 Click the “Submit For Review” button to send a notification to the branch manager | The system will mark the assessment as “Pending Review”, and sends an email message to the branch manager; notifying them of the new assessment that requires a review.  Once the branch manager logs into the system, they will automatically be directed to a page that has a listing of all assessments that are due for reviews for their relevant branch. |
|  | **10.2 Review an assessment and provide feedback; or approve an assessment;** | This procedure only applies to branch managers (BM) or all other users with such authorisation levels i.e abobe the Business Advisor/Practitioner.  - When an assessment is submitted for review by the BA, the BM receives an email with all details of that assessment as shown below:  Good day  A new assessment/version has been submitted for review. Please log into the SEDA Tools to submit your feedback or approval.  Assessment Type: Business Idea Assessment Tool Assessment ID: 87800045 Client Name: Khanya Mkhangisa  Business name: Khanya Engineering  Assessment Date: 26/02/2019 03:21:40 PM Practitioner: Mathibidi Tsolofelo  Regards  SEDA Tools Team.   * When BM logs into the tools website, they are directed to an assessments’ list page that lists all assessments that have been submitted by users for reviews (for the specific branch .. in the case of Ms); as illustrated below      * Click on the “Details …” link of the corresponding assessment to go to the assessment details:   The system will navigate to the appropriate tool and open up the specified assessment:   * Click on the “Online Report” link (indicated as 1 on illustration below) to open a summary report of the assessment. Use this report to examine the assessment, and provide the feedback accordingly. Please note here that the BM can also open each section of the assessment to check the details, by using the menu links on the left side of the assessment. * Click on the “**Feedback**” link to open the feedback form as illustrated below:      * The “Feedback” link will navigate to the feedback form that will be displayed as illustrated below:      1. Feedback form heading 2. Feedback content area 3. Re-Work button – this will be used to submit feedback where the assessment needs to be polished by the BA 4. Approve button will be used after proving feedback content where the assessment is approved 5. Clear button is used to enter new feedback record 6. Feedback History – will list previous feedback sessions. 7. Exit Feedback button is used to exit feedback session  * If the assessment needs to be re-worked on by BA, Click “Re-Work”; otherwise click “Approve” if the assessment is acceptable.   The system will generate and forward a notification to the BA/Practitioner informing them of the MBs feedback |
|  | 10.1 Click the “Feedback” link to view BM’s feedback | Once a review has been done by the BM, the BA will receive an email notifying them of the event, with details of the assessment.  The BA will open the relevant tool and assessment, and click on the “Feedback” link too.  This will open the Feedback form, which will list all feedback sessions that have been provided by the BM (Ideally, the last session will provide the latest feedback review from the BM, and contains the latest suggestions (see illustration below)     * BA will have to re-work on the assessment as suggested in the feedback, and re-submit for review again. * The cycle will be repeated until the BM approves the assessment   If the assessment has been approved, the “Final Report” section will be displayed, as described next |
|  | 1. Specify “Final Report” | If the assessment has been approved, the “Final Report” section will be revealed which will solicit users to attach the final report to the assessment so it can be closed and “filed”     1. Final Report link will not be active at this point since the report has NOT yet been supplied 2. Click the “Choose File” button to open the file-dialog box and select the scanned, signed, final report   The selected report will appear as indicated on 4 in the illustration above   1. Click on the “Upload Final Report” link to upload the report to the SEDA central server   Once the final report is successfully uploaded, the assessment links will be displayed as indicated in illustrated  Ion below:   |  |  | | --- | --- | |  | As illustrated;   1. The “Final Report” link becomes an active link, which will open the uploaded final report of the current assessment when excited by a mouse-click. Also note that the green-coded disc bullet of the Final Report link is immediately replaced by the greed-coded tick-mark bullet 2. The final report can be replaced! “Report Saved” indicator shows that there has been a previously uploaded final report 3. Once the final report is uploaded, the assessment can finally be Submitted, and closed | |
|  |  |  |
|  | 1. Click “Submit” from the “Submit Assessment” section to submit the assessment | In this stage, the practitioner will print the final online report, scan the document and attach to the assessment as the final report  The assessment will then be submitted, indicating that it has been finalised hence can be “filed”.   |  |  | | --- | --- | |  | * Click on the “Submit Assessment” link button as indicated (3). * An overlaying form will be displayed, which will solicit a confirmation if indeed the submission must be done: see illustration below. * Click the “Continue” button to confirm and the “Cancel” button to abandon submission.       Once the assessment has been submitted, the “Submit Assessment” button will display a message “Assessment Submitted” | |
| **Comments:** |  | |

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| **Use Case 10** | User must be able carry out an assessment: **SMALL BUSINESS ASSESSMENT TOOL** | |
| **Pre-Conditions:** | User has required and valid assessment details and responses | |
| **Post-Conditions:** | User has successfully carried out an assessment | |
|  | **ACTION** | **EXPECTED RESULT** |
| 1. On the tools home page, Click “Small Business Assessments” | Small Business Assessment tool home page will be displayed, with list of all previous assessments done or accessible to the user: |
| 1. Click on the “New S/B Assessment” link as indicated in the illustration” | Small Business Assessment form will be displayed as indicated below:  First, the new assessment will require the user to specify 2 (two) items related to the business that is being assessed: i.e   1. Client Name (indicated 1 on illustration below) 2. Business Name (indicated 2 on illustration below) |
| 1. Click on the “Client” combo box and select the required Client: | All **clients assigned to current user and active on the SEDA CRM** will appear on the list. Once required client is selected, all their registered business entities in the CRM will appear in the “Business” drop-down. |
| 1. Click on the “Business Name” drop-down to select required business that belongs to selected client (at the top) | Once a business is selected, a button labelled “Create Assessment” will appear on the right side. |
|  | 1. Click on the “Create Assessment” button to initialise the assessment | 1. If the assessment has been successfully initiated, a confirmation message(indicated by 1) will appear, replacing the “Create Assessment” button; and the assessment outline will be exposed 2. The “Assessment Outline” section (indicated by 2) contains links to all sub-sections of an assessment that will need to be completed before an assessment can be submitted (closed) 3. Note here that the SBAT has an extra SWOT analysis section described in sections below. 4. If a section is not yet completed by the user, it will be bulleted by a green circle () on the left side, whereas a completed section of the assessment will have a green tick mark () bullet. |
|  | 1. Click on the “Company Background” link to open and supply the company background. | A new form will be displayed overlaying the original assessment form; as indicated below.   * Supply the necessary company background details; and click the “Save” button to save. * Click the “Close Form” link at the bottom-right corner of the form to close it. * When the form refreshes next, a tick-mark bullet will replace the current circle bullet |
|  | 1. Click on the “Questionnaire” link to complete the questionnaire | Main questionnaire form will appear on the main working space.   * Click “Questionnaire” link as indicated below, to display the Questionnaire form if not already on the active screen * The top-most heading of the entire form must also indicate “Small Business Assessment .. (Questionnaire)”      * Complete the questions and click the “Save” button at the bottom of the questionnaire * Confirmation message will be displayed at the bottom of the form if the save was successful. * A tick mark bullet will appear on the left of the “Questionnaire” link |
|  | 1. Click on “Recommendations” link to supply the assessment recommendations | The “recommendations” form will be displayed overlaying the main working form area. At the top of the form will be the title of the company that is being assessed (indicated as 1)   * Supply the necessary recommendations in the content area provided * Click the “Save” button (indicated by 2) at the bottom of the recommendations typing area * Confirmation message will appear if the save was successful (indicated by 3) * Click the “Close” button to return to the main assessment form. |
|  | 1. Click “SWOT Analysis” button to supply SWOT details | * The SWOT Analysis page will show on the main assessment area when a user selects the “SWOT Analysis” link from the sections menu (1) * Complete all the sections of the SWOT questionnaire and save; |
|  | 1. Click on the “Action Plans” to supply the action plans details | The Action plans form will also appear as an independent for overlaying the main working form area as indicated in the illustration below.  The company being assessed will also appear at the top of the form (indicated by 1 in the illustration below)   * Supply each action plan in the spaces provided for Action Plan, Responsible Person, Start Date, End date * Click on the “Save” button on the right side of the content area(indicated by 2) to save the action plan * Once saved, the action plan will appear in a table below that appears at the bottom of the content-entry area * Click the “Close” button to close the action plans form     **To Edit Action plan:**   * Identify the action to be edited in the action plans list table * Select the action plan by clicking the “Edit…” link (indicated by 3 in illustration above) in the action plans table. The action plan will appear inside the data-entry text-boxes * Edit the action plan accordingly, and click the “Save” button * The amended action plan will re-appear in the action plans table with edited data reflected   **To Delete Action Plan:**   * Identify the action plan to be edited in the action plans list table * Click the “Delete” link button (indicated by 4 in the illustration) in the table alongside the action plan to be deleted * The action plan will disappear from the list |
|  | 1. Click “Online Report” link at the top-right corner menu to view the online report | User can always view the online report that is generated by the system automatically at any point after creating an assessment.  However, after all section are completed, the report will have all the content that will be printed for the final report.  To view the online report, click “Online Report” from the menu illustrated below (indicated as 1)    An overlaying form will be displayed as indicated in illustration below.   1. User can export the report into any of the indicated formats (PDF, EXCEL, MS WORD) 2. User can use the navigation page bar to move from 1 page of the report to the next 3. Click the “Close report” button to close the report and return to the main assessment area |
|  | 1. **SUBMIT assessment for Review by branch manager** | Once all sections up to “Action Plans” (excluding “Final Report”) are completed, the assessment will be ready to be sent to the branch manager for review.  NB: user can easily check if all relevant sections of the assessment are completed by check the bullets on the left side of the section menus. Green tick-mark bullets indicate the section has been attended to, while green disk bullets indicate the section is still pending.  An additional section labelled “**Assessment Review/Submit**” will be exposed below the “**Assessment Outline**” section, as indicated on the illustration below. |
|  | 10.1 Click the “Submit For Review” button to send a notification to the branch manager | The system will mark the assessment as “Pending Review”, and sends an email message to the branch manager; notifying them of the new assessment that requires a review.  Once the branch manager logs into the system, they will automatically be directed to a page that has a listing of all assessments that are due for reviews for their relevant branch. |
|  | 10.2 Review an assessment and provide feedback; or approve an assessment; | **This procedure only applies to branch managers (BM) or all other users with such authorisation levels i.e abobe the Business Advisor/Practitioner.**  **- When an assessment is submitted for review by the BA, the BM receives an email with all details of that assessment** as shown below:  Good day  A new assessment/version has been submitted for review. Please log into the SEDA Tools to submit your feedback or approval.  Assessment Type: Business Idea Assessment Tool Assessment ID: 87800045 Client Name: Khanya Mkhangisa  Business name: Khanya Engineering  Assessment Date: 26/02/2019 03:21:40 PM Practitioner: Mathibidi Tsolofelo  Regards  SEDA Tools Team.   * When BM logs into the tools website, they are directed to an assessments’ list page that lists all assessments that have been submitted by users for reviews (for the specific branch .. in the case of Ms); as illustrated below      * Click on the “Details …” link of the corresponding assessment to go to the assessment details:   The system will navigate to the appropriate tool and open up the specified assessment:   * Click on the “Online Report” link (indicated as 1 on illustration below) to open a summary report of the assessment. Use this report to examine the assessment, and provide the feedback accordingly. Please note here that the BM can also open each section of the assessment to check the details, by using the menu links on the left side of the assessment. * Click on the “Feedback” link to open the feedback form as illustrated below:      * The “Feedback” link will navigate to the feedback form that will be displayed as illustrated below:      1. Feedback form heading 2. Feedback content area 3. Re-Work button – this will be used to submit feedback where the assessment needs to be polished by the BA 4. Approve button will be used after proving feedback content where the assessment is approved 5. Clear button is used to enter new feedback record 6. Feedback History – will list previous feedback sessions. 7. Exit Feedback button is used to exit feedback session  * If the assessment needs to be re-worked on by BA, Click “Re-Work”; otherwise click “Approve” if the assessment is acceptable.   The system will generate and forward a notification to the BA/Practitioner informing them of the MBs feedback |
|  | 10.1 Click the “Feedback” link to view BM’s feedback | Once a review has been done by the BM, the BA will receive an email notifying them of the event, with details of the assessment.  The BA will open the relevant tool and assessment, and click on the “Feedback” link too.  This will open the Feedback form, which will list all feedback sessions that have been provided by the BM (Ideally, the last session will provide the latest feedback review from the BM, and contains the latest suggestions (see illustration below)     * BA will have to re-work on the assessment as suggested in the feedback, and re-submit for review again. * The cycle will be repeated until the BM approves the assessment   If the assessment has been approved, the “Final Report” section will be displayed, as described next |
|  | 1. Upload the “Final Report” | If the assessment has been approved, the “Final Report” section will be revealed which will solicit users to attach the final report to the assessment so it can be closed and “closed and filed”     1. Final Report link will not be active at this point since the report has NOT yet been supplied 2. Click the “Choose File” button to open the file-dialog box and select the scanned, signed, final report   The selected report will appear as indicated on 4 in the illustration above   1. Click on the “Upload Final Report” link to upload the report to the SEDA central server   Once the final report is successfully uploaded, the assessment links will be displayed as indicated in illustrated  Ion below:   |  |  | | --- | --- | |  | As illustrated;   1. The “Final Report” link becomes an active link, which will open the uploaded final report of the current assessment when excited by a mouse-click. Also note that the green-coded disc bullet of the Final Report link is immediately replaced by the greed-coded tick-mark bullet 2. The final report can be replaced! “Report Saved” indicator shows that there has been a previously uploaded final report 3. Once the final report is uploaded, the assessment can finally be Submitted, and closed | |
|  |  |  |
|  | 1. Click “Submit” from the “Submit Assessment” section to submit the assessment | In this stage, the practitioner will print the final online report, scan the document and attach to the assessment as the final report  The assessment will then be submitted, indicating that it has been finalised hence can be “filed”.   |  |  | | --- | --- | |  | * Click on the “Submit Assessment” link button as indicated (3). * An overlaying form will be displayed, which will solicit a confirmation if indeed the submission must be done: see illustration below. * Click the “Continue” button to confirm and the “Cancel” button to abandon submission.       Once the assessment has been submitted, the “Submit Assessment” button will display a message “Assessment Submitted” | |
| **Comments:** |  | |

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| **Use Case 11** | User must be able carry out an assessment: **EXPORT READINESS ASSESSMENT TOOL** | |
| **Pre-Conditions:** | User has required and valid assessment details and responses | |
| **Post-Conditions:** | User has successfully carried out an assessment | |
|  | **ACTION** | **EXPECTED RESULT** |
| 1. On the tools home page, Click “Business Idea Assessments” | Export Readiness Assessment(ERA) tool home page will be displayed, with list of all previous assessments done or accessible to the user: |
| 1. Click on the “New BIA Assessment” link as indicated in the illustration” | Export Readiness Assessment form will be displayed as indicated below:  First, the new assessment will require the user to specify 2 (two) items related to the business that is being assessed: i.e   1. The client name 2. Business name |
| 1. Click on the “Client” combo box and select the required Client: | All ***clients assigned to current user and active on the SEDA CRM*** will appear on the list. Once required client is selected, all their registered business entities in the CRM will appear in the “Business” drop-down. |
| 1. Click on the “Business Name” drop-down to select required business that belongs to selected client (at the top) | Once Business is selected, a button labelled “Create Assessment” will appear on the right side. |
|  | 1. Click on the “Create Assessment” button to initialise the assessment | 1. If the assessment has been successfully initiated, a confirmation message(indicated by 1) will appear, replacing the “Create Assessment” button; and the assessment outline will be exposed 2. The “Assessment Outline” section (indicated by 2) contains links to all sub-sections of an assessment that will need to be completed before an assessment can be submitted (closed) 3. If a section is not yet completed by the user, it will be bulleted by a green circle () on the left side, whereas a completed section of the assessment will have a green tick mark () bullet. |
|  | 1. Click on the “Company Background” link to open and supply the company background. | A new form will be displayed overlaying the original assessment form; as indicated below.   * Supply the necessary company background details; and click the “Save” button to save. * Click the “Close Form” link at the bottom-right corner of the form to close it. * When the form refreshes next, a tick-mark bullet will replace the current circle bullet |
|  | 1. Click on the “Questionnaire” link to complete the questionnaire | Main questionnaire form will appear on the main working space.   * Click “Questionnaire” link as indicated below, to display the Questionnaire form if not already on the active screen * The top-most heading of the entire form must also indicate “Business Idea Assessment ..(Questionnaire)”      * Complete the questions and click the “Save” button at the bottom of the questionnaire * Confirmation message will be displayed at the bottom of the form if the save was successful. * A tick mark bullet will appear on the left of the “Questionnaire” link |
|  | 1. Click on Recommendations link to supply the assessment recommendations | The Recommendations form will be displayed overlaying the main working form area. At the top of the form will be the title of the company that is being assessed (indicated as 1)   * Supply the necessary recommendations in the content area provided * Click the “Save” button (indicated by 2) at the bottom of the recommendations typing area * Confirmation message will appear if the save was successful (indicated by 3) * Click the “Close” button to return to the main assessment form. |
|  | 1. Click on the “Action Plans” to supply the action plans details | The Action plans form will also appear as an independent for overlaying the main working form area as indicated in the illustration below.  The company being assessed will also appear at the top of the form (indicated by 1 in the illustration below)   * Supply each action plan in the spaces provided for Action Plan, Responsible Person, Start Date, End date * Click on the “Save” button on the right side of the content area(indicated by 2) to save the action plan * Once saved, the action plan will appear in a table below that appears at the bottom of the content-entry area * Click the “Close” button to close the action plans form     **To Edit Action plan:**   * Identify the action to be edited in the action plans list table * Select the action plan by clicking the “Edit…” link (indicated by 3 in illustration above) in the action plans table. The action plan will appear inside the data-entry text-boxes * Edit the action plan accordingly, and click the “Save” button * The amended action plan will re-appear in the action plans table with edited data reflected   **To Delete Action Plan:**   * Identify the action plan to be edited in the action plans list table * Click the “Delete” link button (indicated by 4 in the illustration) in the table alongside the action plan to be deleted * The action plan will disappear from the list |
|  | 1. Click “Online Report” link at the top-right corner menu to view the online report | User can always view the online report that is generated by the system automatically at any point after creating an assessment.  However, after all section are completed, the report will have all the content that will be printed for the final report.  To view the online report, click “Online Report” from the menu illustrated below (indicated as 1)    An overlaying form will be displayed as indicated in illustration below.   1. User can export the report into any of the indicated formats (PDF, EXCEL, MS WORD) 2. User can use the navigation page bar to move from 1 page of the report to the next 3. Click the “Close report” button to close the report and return to the main assessment area |
|  | 1. **SUBMIT assessment for Review by branch manager** | Once all sections up to “Action Plans” (excluding “Final Report”) are completed, the assessment will be ready to be sent to the branch manager for review.  NB: user can easily check if all relevant sections of the assessment are completed by check the bullets on the left side of the section menus. Green tick-mark bullets indicate the section has been attended to, while green disk bullets indicate the section is still pending.  An additional section labelled “**Assessment Review/Submit**” will be exposed below the “**Assessment Outline**” section, as indicated on the illustration below. |
|  | 10.1 Click the “Submit For Review” button to send a notification to the branch manager | The system will mark the assessment as “Pending Review”, and sends an email message to the branch manager; notifying them of the new assessment that requires a review.  Once the branch manager logs into the system, they will automatically be directed to a page that has a listing of all assessments that are due for reviews for their relevant branch. |
|  | **10.2 Review an assessment and provide feedback; or approve an assessment;** | This procedure only applies to branch managers (BM) or all other users with such authorisation levels i.e abobe the Business Advisor/Practitioner.  - When an assessment is submitted for review by the BA, the BM receives an email with all details of that assessment as shown below:  Good day  A new assessment/version has been submitted for review. Please log into the SEDA Tools to submit your feedback or approval.  Assessment Type: Business Idea Assessment Tool Assessment ID: 87800045 Client Name: Khanya Mkhangisa  Business name: Khanya Engineering  Assessment Date: 26/02/2019 03:21:40 PM Practitioner: Mathibidi Tsolofelo  Regards  SEDA Tools Team.   * When BM logs into the tools website, they are directed to an assessments’ list page that lists all assessments that have been submitted by users for reviews (for the specific branch .. in the case of Ms); as illustrated below      * Click on the “Details …” link of the corresponding assessment to go to the assessment details:   The system will navigate to the appropriate tool and open up the specified assessment:   * Click on the “Online Report” link (indicated as 1 on illustration below) to open a summary report of the assessment. Use this report to examine the assessment, and provide the feedback accordingly. Please note here that the BM can also open each section of the assessment to check the details, by using the menu links on the left side of the assessment. * Click on the “**Feedback**” link to open the feedback form as illustrated below:      * The “Feedback” link will navigate to the feedback form that will be displayed as illustrated below:      1. Feedback form heading 2. Feedback content area 3. Re-Work button – this will be used to submit feedback where the assessment needs to be polished by the BA 4. Approve button will be used after proving feedback content where the assessment is approved 5. Clear button is used to enter new feedback record 6. Feedback History – will list previous feedback sessions. 7. Exit Feedback button is used to exit feedback session  * If the assessment needs to be re-worked on by BA, Click “Re-Work”; otherwise click “Approve” if the assessment is acceptable.   The system will generate and forward a notification to the BA/Practitioner informing them of the MBs feedback |
|  | 10.1 Click the “Feedback” link to view BM’s feedback | Once a review has been done by the BM, the BA will receive an email notifying them of the event, with details of the assessment.  The BA will open the relevant tool and assessment, and click on the “Feedback” link too.  This will open the Feedback form, which will list all feedback sessions that have been provided by the BM (Ideally, the last session will provide the latest feedback review from the BM, and contains the latest suggestions (see illustration below)     * BA will have to re-work on the assessment as suggested in the feedback, and re-submit for review again. * The cycle will be repeated until the BM approves the assessment   If the assessment has been approved, the “Final Report” section will be displayed, as described next |
|  | 1. Specify “Final Report” | If the assessment has been approved, the “Final Report” section will be revealed which will solicit users to attach the final report to the assessment so it can be closed and “filed”     1. Final Report link will not be active at this point since the report has NOT yet been supplied 2. Click the “Choose File” button to open the file-dialog box and select the scanned, signed, final report   The selected report will appear as indicated on 4 in the illustration above   1. Click on the “Upload Final Report” link to upload the report to the SEDA central server   Once the final report is successfully uploaded, the assessment links will be displayed as indicated in illustrated  Ion below:   |  |  | | --- | --- | |  | As illustrated;   1. The “Final Report” link becomes an active link, which will open the uploaded final report of the current assessment when excited by a mouse-click. Also note that the green-coded disc bullet of the Final Report link is immediately replaced by the greed-coded tick-mark bullet 2. The final report can be replaced! “Report Saved” indicator shows that there has been a previously uploaded final report 3. Once the final report is uploaded, the assessment can finally be Submitted, and closed | |
|  |  |  |
|  | 1. Click “Submit” from the “Submit Assessment” section to submit the assessment | In this stage, the practitioner will print the final online report, scan the document and attach to the assessment as the final report  The assessment will then be submitted, indicating that it has been finalised hence can be “filed”.   |  |  | | --- | --- | |  | * Click on the “Submit Assessment” link button as indicated (3). * An overlaying form will be displayed, which will solicit a confirmation if indeed the submission must be done: see illustration below. * Click the “Continue” button to confirm and the “Cancel” button to abandon submission.       Once the assessment has been submitted, the “Submit Assessment” button will display a message “Assessment Submitted” | |
| **Comments:** |  | |