

FINDASH Operations Guide

Notifications

User Groups

Workflow



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Introduction

This documentation is intended to provide the Managerial/Executive users with a preliminary understanding of functioning of the FINDASH system. The Notifications section is intended to describe the types so of notifications generated by the FINDASH system and users / user groups receiving these notifications. The User Groups section is intended to describe the types of User Groups and its respective access levels into the System. The Workflow diagram is intended to illustrate the state changes of an assignment from entry to exit including the various process involved in the workflow.

FINDASH Notifications

No.	Name	Description	Users / User Groups
1	Pending Legal and Finance approval	Triggered when a new assignment is submitted to FINDASH.	1. EA.
2	Review Finance information	Triggered when a new assignment submitted requires Finance approval.	1. Finance Group.
3	Review Legal Information	Triggered when a new assignment submitted is approved by Finance and now require Legal approval.	1. Legal Group.
4	Approved by Legal and Finance teams	Triggered when a new assignment / assignment update is approved by both Legal and Finance teams.	1. EA 2. Global Notifications Group.
5	Reject By [Username]	Triggered when a new assignment submission is rejected by Finance team.	1. EA 2. User who Rejected the submission.
6	Reject By [Username]	Triggered when a new assignment submission is rejected by Legal team.	1. EA 2. User who Rejected the submission.
7	Delete Assignment Notification	Triggered when an assignment is deleted.	1. EA 2. User who executed the action. 3. Global Notifications Group.
8	Assignment Cancellation Notification	Triggered when an assignment is Cancelled.	1. EA 2. User who executed the action.

			3. Global Notifications Group.
9	Assignment Completion Notification	Triggered when an assignment is Completed.	1. EA 2. User who executed the action. 3. Global Notifications Group.
10	Search update notification Pending Legal and finance please review	Triggered when an assignment is Updated.	1. EA 2. User who executed the action.
11	Review Legal information	Triggered when an assignment is Updated and require Legal approval.	1. EA 2. Legal Group.
12	Review Finance information	Triggered when an assignment is Updated and require Finance approval.	1. EA 2. Finance Group.
13*	Retainer Reminder Notification*	Triggered when an invoice is due within the next 5 days.	1. EA

FINDASH User Groups

Management User Groups

No.	User Group	Access Level	Users
1	Finance Group	<ul style="list-style-type: none"> Approve assignments in Finance approval queue. View Assignments which are in Pending or Open State. 	<ul style="list-style-type: none"> Mohit Kumar. Andrew Fyfe. Rocky Bandara. Aysun Oz. Amber Shamim. Reshma Singh. Patrick Meehan. Foysol Miah.
2	Legal Group	<ul style="list-style-type: none"> Approve assignments in Legal approval queue. View Assignments which are in Pending or Open State. 	<ul style="list-style-type: none"> Rocky Bandara. Patrick Meehan. Imsal Shahid.
3	Global Notifications Group	<ul style="list-style-type: none"> No Special permissions 	<ul style="list-style-type: none"> Patrick Meehan. Foysol Miah. Rona Sinckler.

		<ul style="list-style-type: none"> Receives Notifications as described in the Notifications section. 	<ul style="list-style-type: none"> Ayzun Oz.
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General User Groups

No.	User Types	Access Level
1	Consultant	<ul style="list-style-type: none"> Create a new assignment. View any assignment with no limitations. Update an assignment provided that the consultant is listed in the assignment and the assignment is in "Pending", "Open" or "Reject" State. Complete an Assignment provided that the consultant is listed in the assignment. Cancel an Assignment provided that the consultant is listed in the assignment. Hold an Assignment provided that the consultant is listed in the assignment. Mark an Assignment as Active provided that the consultant is listed in the assignment. View General Dashboard data.
2	Support	<ul style="list-style-type: none"> Same Access level as consultant. View any assignment with no limitations. Update an assignment provided that assignment is in "Pending", "Open" or "Reject" State.
3	Associate	<ul style="list-style-type: none"> Same Access level as consultant. Update an assignment provided that the associate is listed in the assignment and the assignment is in "Pending", or "Reject" State.
4	Senior Associate	<ul style="list-style-type: none"> Same Access level as consultant. Update an assignment provided that the senior associate is listed in the assignment and the assignment is in "Pending", or "Reject" State.
5	Administrator	<ul style="list-style-type: none"> All Permissions
6	Super Administrator	<ul style="list-style-type: none"> All Permissions

FINDASH Workflow

