



User Manual

Group 4 - CERP Target Tracking

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|   |           |
|---|-----------|
| <b>1. System Access and Setup.....</b>                    | <b>3</b>  |
| <b>2. User Authentication and Profile Management.....</b> | <b>7</b>  |
| <b>3. Dashboard Navigation.....</b>                       | <b>10</b> |

## Welcome!

This document provides comprehensive guidelines on accessing and using the CERP3 Target Tracking website efficiently. The system is designed to streamline target management, enhance progress tracking, and improve collaboration between users and managers.

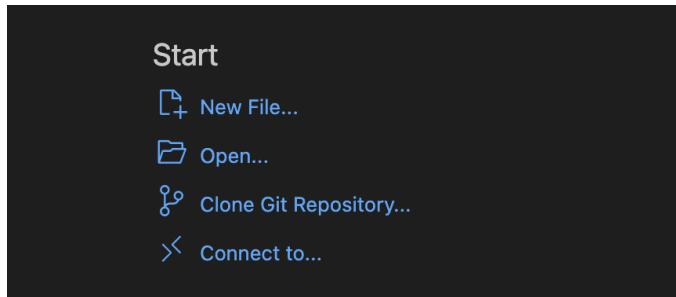
The guide covers the following key areas:

- **System Installation** – Steps to set up and access the platform.
- **User Authentication and Profile Management** – Creating an account, logging in, and managing user roles.
- **Dashboard Navigation** – Understanding the interface and available functionalities.

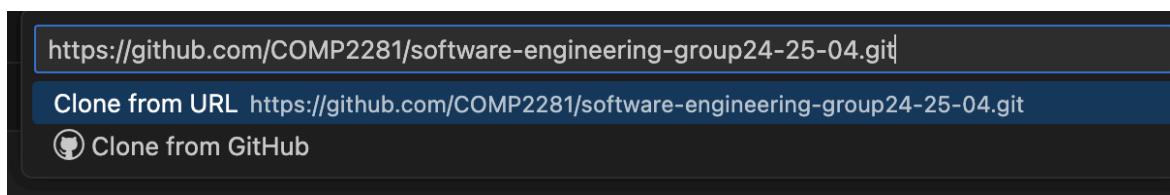
Whether you are a standard user responsible for tracking assigned targets or a manager overseeing multiple tasks, this guide will help you maximise the system's features for efficient and structured target management.

## 1. System Access and Setup

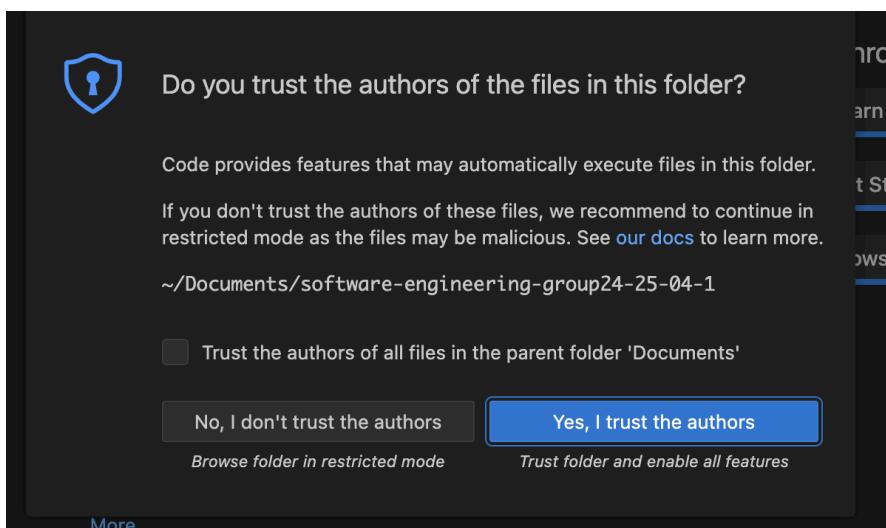
- **Installation Steps:**
- **Be sure to install an IDE, preferably Visual Studio Code, and download the version compatible with your system's architecture from their official website (<https://code.visualstudio.com/download>)**
- a) Ensure you have Node.js installed; if not, install it via their official website (<https://nodejs.org/en>) and follow the steps for installation.
- b) When both Visual Studio Code and Node.js have been installed, open Visual Studio Code and click the option to **Clone Git Repository** under the Start section.



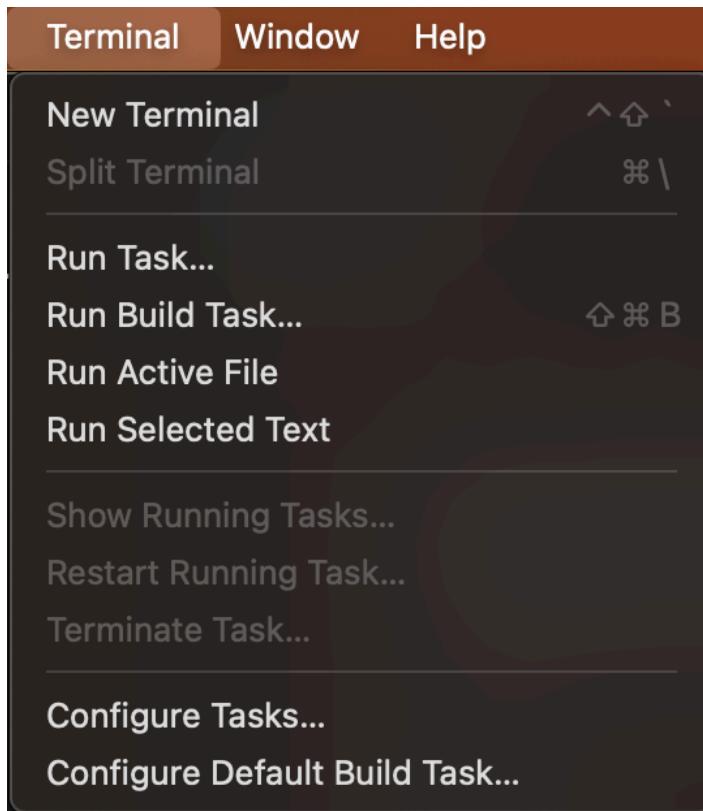
- c) Copy the link <https://github.com/COMP2281/software-engineering-group24-25-04.git> into the search bar that comes up and click **Clone from URL**.



- d) Choose where on your computer to save the folder and then save it.
- e) Open the file and click **Yes, I trust the authors**.



- f) On the top menu, click **Terminal** and then **New Terminal**.



- g) When the terminal opens, split the terminal into two parts and type in `cd "code/target-tracker_v1/frontend"` in one and `cd "code/target-tracker_v1/backend"` in the other (this changes the current working directory in both parts to the frontend and backend folders, respectively).

Install dependencies using `npm install` in both parts of the terminal (if vulnerabilities are shown, run `npm audit fix` to fix them).

A screenshot of the VS Code interface showing a split terminal window. The top bar includes 'PROBLEMS', 'OUTPUT', 'DEBUG CONSOLE', 'TERMINAL' (which is underlined to indicate it's active), 'PORTS', and 'COMMENTS'. The title bar of the terminal says 'zsh - backend'. The terminal window is split vertically. The left pane shows the command: 'tirenioladimeji@Tirenis-MacBook-Air-5 software-engineering % cd "code/target-tracker\_v1/frontend"'. The right pane shows the command: 'tirenioladimeji@Tirenis-MacBook-Air-5 software-engineering % cd "code/target-tracker\_v1/backend"'. Both panes show the response: 'tirenioladimeji@Tirenis-MacBook-Air-5 backend %'. The status bar at the bottom shows 'zsh - frontend' and 'zsh - backend'.

h) In both parts, type in the following commands to install **the necessary dependencies**:

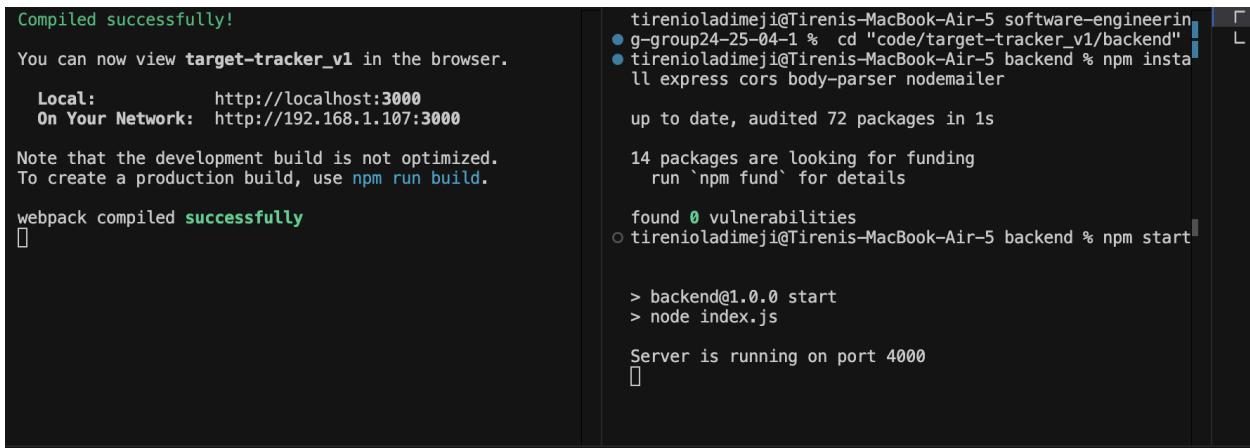
**Frontend:** `npm install react-bootstrap bootstrap axios validator`

**Backend:** `npm install express cors body-parser nodemailer`

By this point, everything should be all set up, and you're ready to start up the website!

## Starting the System:

- To start up the website, type `npm start` in both the frontend and backend parts of the terminal.



The image shows two terminal windows side-by-side. The left terminal window displays the output of running `npm start` in the frontend directory. It includes messages about compilation success, local and network URLs, and a note about the development build being unoptimized. The right terminal window shows the output of running `npm start` in the backend directory, which installs dependencies and starts the server on port 4000.

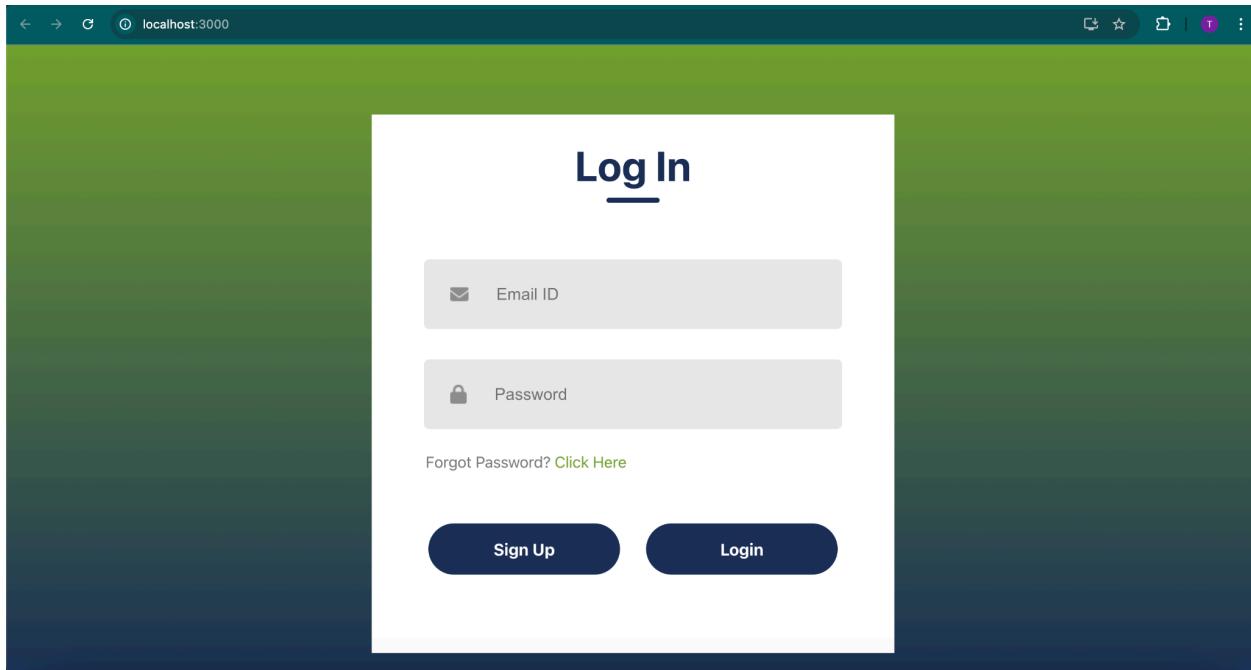
```
Compiled successfully!
You can now view target-tracker_v1 in the browser.
  Local:          http://localhost:3000
  On Your Network: http://192.168.1.107:3000
Note that the development build is not optimized.
To create a production build, use npm run build.
webpack compiled successfully

tirenioladimeji@Tirenis-MacBook-Air-5 software-engineering % g-group24-25-04-1 %
tirenioladimeji@Tirenis-MacBook-Air-5 backend % npm install express cors body-parser nodemailer
up to date, audited 72 packages in 1s
14 packages are looking for funding
  run 'npm fund' for details
found 0 vulnerabilities
tirenioladimeji@Tirenis-MacBook-Air-5 backend % npm start
> backend@1.0.0 start
> node index.js
Server is running on port 4000
```

- If your browser does not start up by default with the website, open `http://localhost:3000` in a browser.
- If errors occur while trying to start the frontend (**due to apparently absent dependencies**), type `npm cache clean --force` to clear the cache and then reinstall npm.

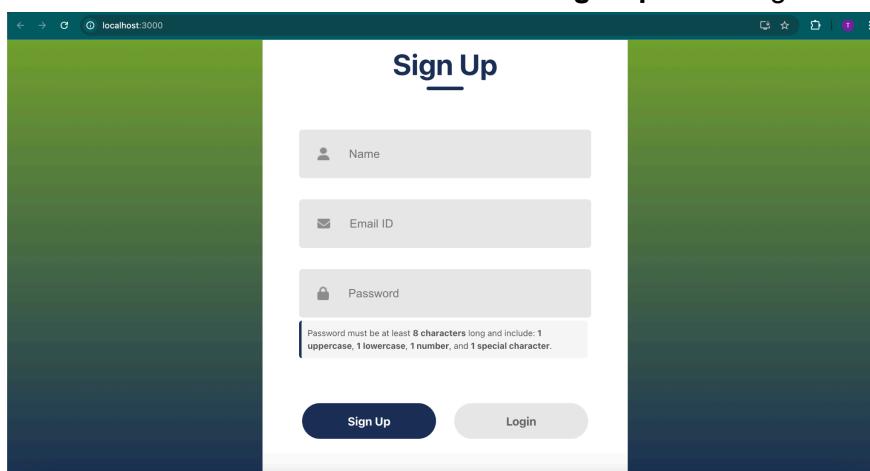
## 2. User Authentication and Profile Management

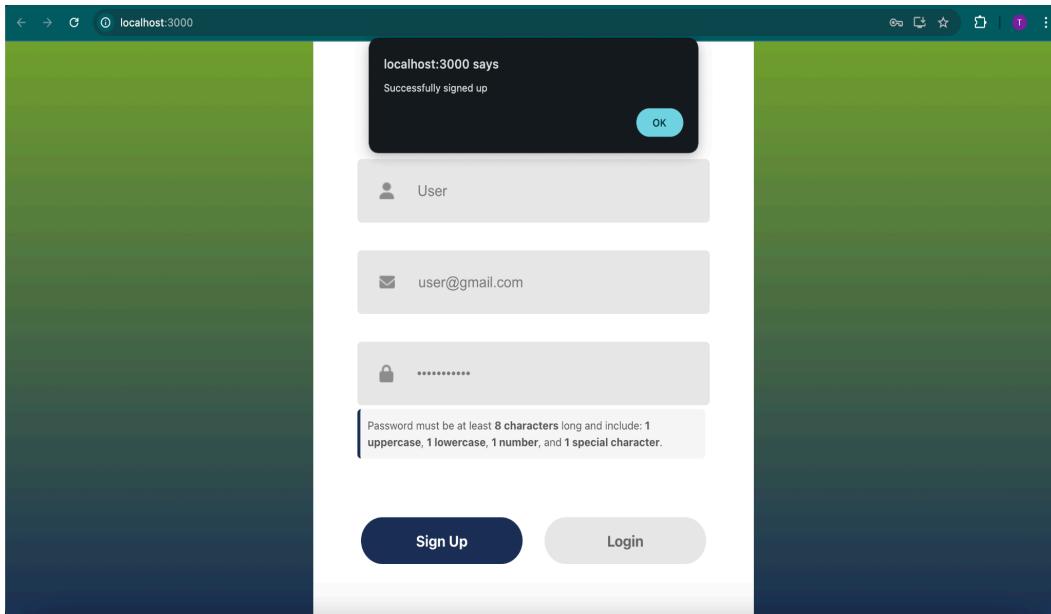
When the website starts up in your browser, you will be taken directly to this login page:



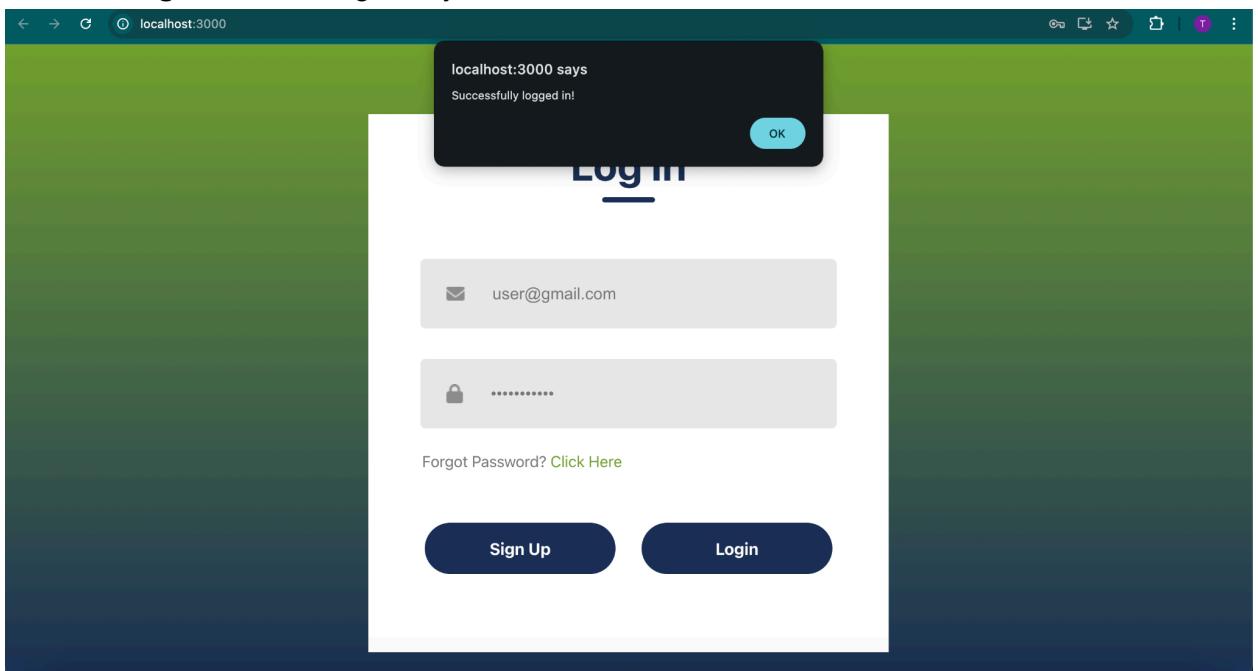
To create an account:

- Click the **Sign Up** button
- Fill in the information shown and click the **Sign Up** button again





- Click the **Login** button to log in to your account.



- If you have **forgotten your password** at any point, click “**Click here**” on the **Log In** page and fill in the **Forgot Password** form:

localhost:3000

## Log In

✉ user@gmail.com

🔒 \*\*\*\*\*

Forgot Password? [Click Here](#)

Sign Up      Login

localhost:3000

## Forgot Password

User

✉ user@gmail.com

🔒 \*\*\*\*\*

🔒 \*\*\*\*\*

Submit      Back

### 3. Dashboard Navigation

When you have logged in to the site, either as a regular or administrative staff member, you should be directed to your respective dashboard.

Here, you can perform a few functions related to target manipulation, progress tracking and profile viewing.

#### a) Viewing your profile:

- To view your profile, click the icon on the top right of the dashboard.

The screenshot shows the 'Staff Dashboard' interface. At the top, there's a green header bar with the title 'Staff Dashboard' and a user profile icon. Below the header, the 'My Targets' section is visible, featuring a large button with a plus sign to add new targets. To the right of this is a search bar and a dropdown menu set to 'All'. The 'All Targets' section follows, displaying six target cards with their names and current progress percentages:

| Target Name  | Progress (%) |
|--|--------------|
| Retrofit ASHP into current DCC buildings                   | 50.00%       |
| Install energy efficiency and building fabric improvements | 20.00%       |
| Decarbonising Leisure Centres                              | 0.00%        |
| First Stage Decarbonisation Plans                          | 0.00%        |
| Surveys and Heating Decarbonisation Plans                  | 0.00%        |
| Install LED Lighting - DCC                                 | 33%          |

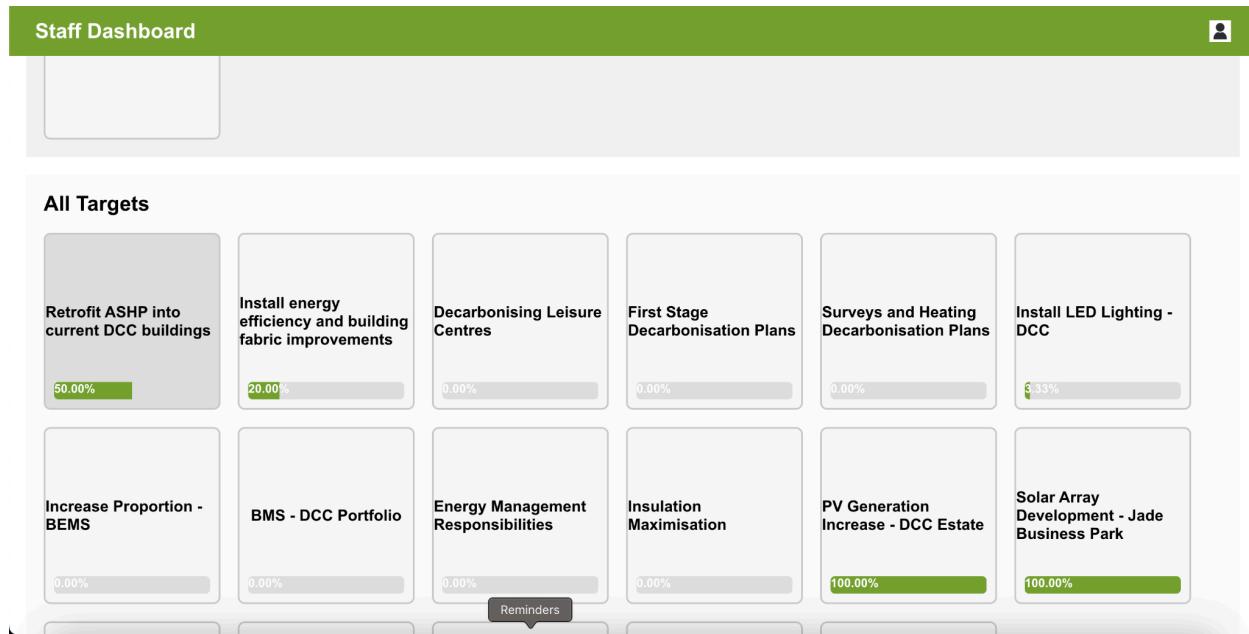
- You should be directed to this page:

The screenshot shows the 'Profile' page. It features a white card with a black header containing the word 'Profile' and a user icon. Inside the card, the user's name is listed as 'User', and their email is listed as 'user@gmail.com'. The 'User Level' is shown as 'user'. At the bottom of the card are two buttons: a red 'Logout' button and a green 'Return to Dashboard' button.

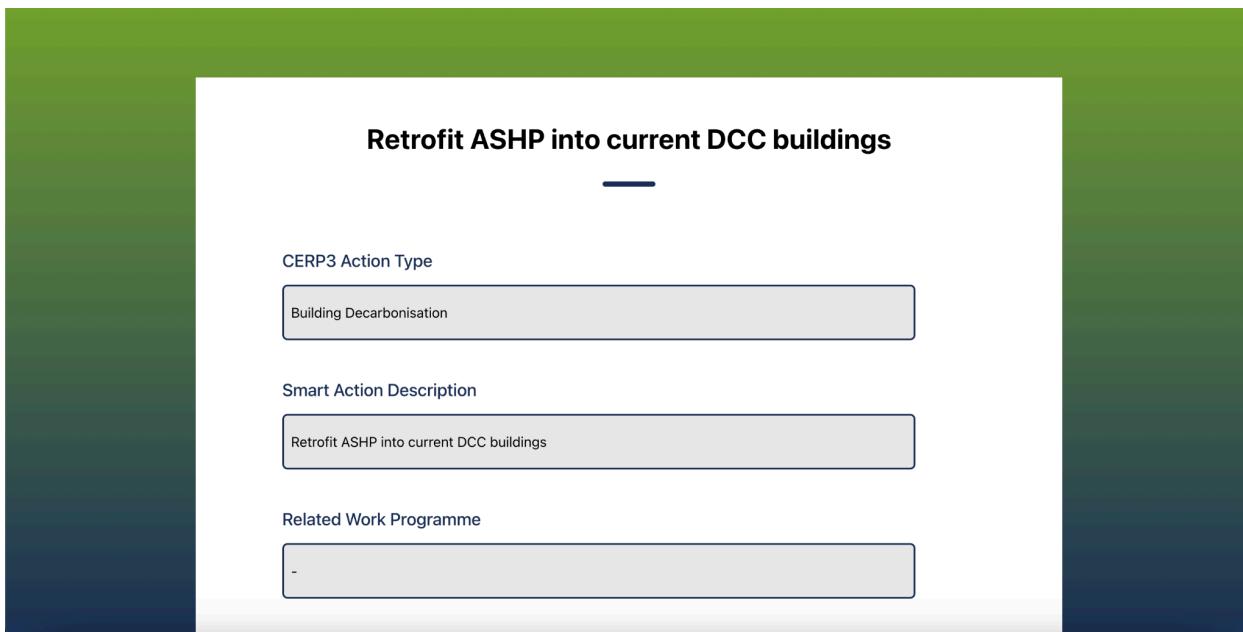
- Every staff member who signs up is assigned the “user” role by default, but depending on their actual role in the organisation, a system administrator can elevate their position to “manager”

**b) Viewing target information:**

- To view a target (whether under **My Targets** or **All Targets**), click on any target box on the page.



- You should be directed to this page:



c) Creating/editing/deleting targets/progress tracking:

- Editing is restricted under the **All Targets** section for regular staff members but enabled for administrative staff.
  - Staff members would have to create a task first to edit it.
- **To create a target:**

- a) Click the plus icon under the **My Targets** section.

The screenshot shows the Staff Dashboard interface. At the top, there is a green header bar with the text "Staff Dashboard" and a user profile icon. Below the header, the main content area is divided into two sections: "My Targets" and "All Targets".

**My Targets:** This section contains a large gray button with a white plus sign (+) in the center. To the right of this button are a search bar labeled "Search..." and a dropdown menu labeled "All".

**All Targets:** This section displays six target cards, each representing a different project or task. Each card includes the target name, a progress bar, and a small preview image at the bottom.

| Target Name  | Progress (%) |
|--|--------------|
| Retrofit ASHP into current DCC buildings                   | 50.00%       |
| Install energy efficiency and building fabric improvements | 20.00%       |
| Decarbonising Leisure Centres                              | 0.00%        |
| First Stage Decarbonisation Plans                          | 0.00%        |
| Surveys and Heating Decarbonisation Plans                  | 0.00%        |
| Install LED Lighting - DCC                                 | 33%          |

b) Fill in the target information on the next page:

New Target

CERP3 Action Type

Smart Action Description

Related Work Programme

Action Type

Project Lead

Progress Metric

c) When all information is filled, click the **Save** button at the bottom of the page.

Cost

Funding Secured

Sufficient Staff

Start Date

Completion Date

Progress Completed

0

Return to Dashboard

View

Delete

Save

- When **all fields** are filled, you will notice that the progress bar in the target box will either stay at zero (if the **Progress Set** is set to zero) or increase by a certain amount.

Funding Secured  
Yes

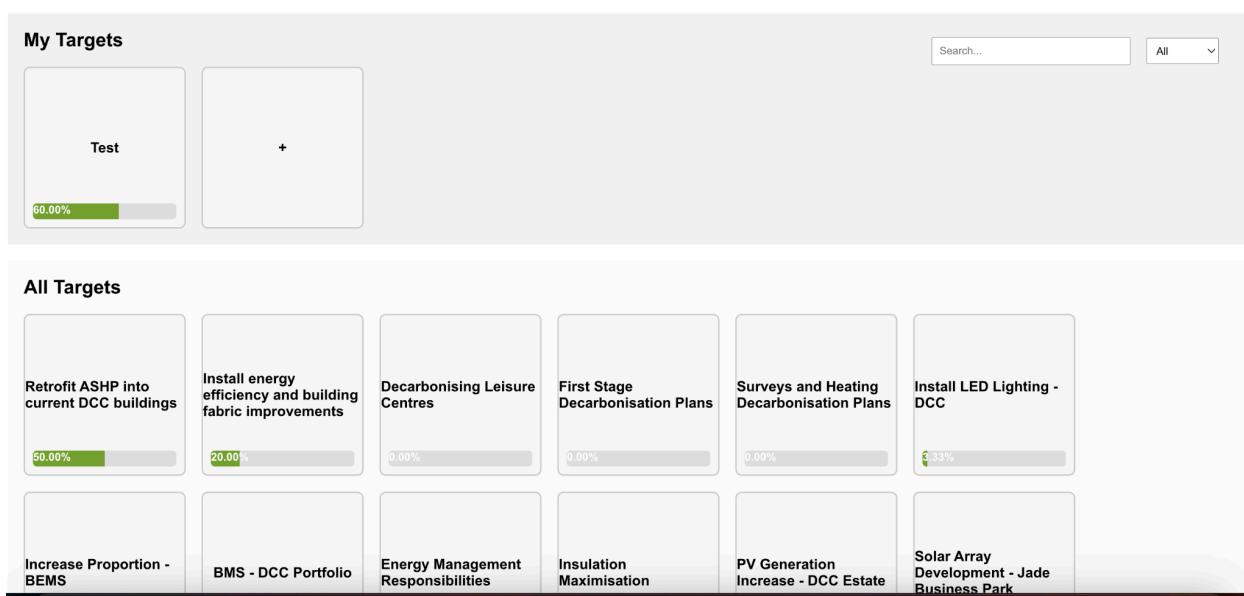
Sufficient Staff  
Yes

Start Date  
14/03/2025

Completion Date  
14/03/2025

Progress Completed  
6

[Return to Dashboard](#) [View](#) [Delete](#) [Save](#)



- To delete a target, click the target box that was created, scroll to the bottom of the page and click the **Delete** button.

The screenshot shows a web application interface. At the top, a modal dialog box is displayed with the title "localhost:3000 says" and the message "Are you sure you want to delete this target?". Below the modal are several input fields: "Start Date" (14/03/2025), "Completion Date" (14/03/2025), and "Progress Completed" (6). At the bottom of the modal are four buttons: "Return to Dashboard" (green), "View" (blue), "Delete" (red), and "Save" (orange). A "Yes" button is also visible on the left side of the modal. Below the modal, the main content area shows a "Staff Dashboard" with a "My Targets" section containing a single card with a plus sign. The "All Targets" section displays six target cards with their names and completion percentages:

| Target Name  | Completion Percentage |
|--|-----------------------|
| Retrofit ASHP into current DCC buildings                   | 50.00%                |
| Install energy efficiency and building fabric improvements | 20.00%                |
| Decarbonising Leisure Centres                              | 0.00%                 |
| First Stage Decarbonisation Plans                          | 0.00%                 |
| Surveys and Heating Decarbonisation Plans                  | 0.00%                 |
| Install LED Lighting - DCC                                 | 3.33%                 |
| Increase Proportion - BEMS                                 |                       |
| BMS - DCC Portfolio  |                       |
| Energy Management Responsibilities                         |                       |
| Insulation Maximisation                                    |                       |
| PV Generation Increase - DCC Estate                        |                       |
| Solar Array Development - Jade Business Park               |                       |

- You can also **apply a filter** to view a specific target, and this can be done by clicking the dropdown menu on the top-right of the **MyTargets section** and then clicking on the target's name to be viewed.
- The search bar can also be used to view a specific target based on the **content within it**.

**Staff Dashboard**

**My Targets**

**All Targets**

Context Menu (Open over All Targets):

- All
- Retrofit ASHP into current DCC buildings
- Install energy efficiency and building fabric improvements
- Decarbonising Leisure Centres
- First Stage Decarbonisation Plans
- Surveys and Heating Decarbonisation Plans
- Install DCC
- Increase Proportion - BEMS
- BMS - DCC Portfolio
- Energy Management Responsibilities
- Insulation Maximisation
- PV Generation Increase - DCC Estate
- Solar Array Development - Jade Business Park
- Small wind turbines - Hackworth Road Depot
- Learnings From Hackworth Road Project
- Solar and Wind Hybrid - Joint Stocks Quarry
- Solar Car Ports
- Upscale Solar Farm - Tanfield

**Staff Dashboard**

**My Targets**

Filter (Open): Low

**All Targets**

| Target   | Progress (%) |
|--|--------------|
| Install energy efficiency and building fabric improvements | 20.00%       |
| First Stage Decarbonisation Plans                          | 0.00%        |
| Increase Proportion - BEMS                                 | 0.00%        |
| BMS - DCC Portfolio  | 0.00%        |
| Insulation Maximisation                                    | 0.00%        |
| Solar Array Development - Jade Business Park               | 100.00%      |
| Small wind turbines - Hackworth Road Depot                 | 0.00%        |
| Learnings From Hackworth Road Project                      | 0.00%        |
| Solar and Wind Hybrid - Joint Stocks Quarry                | 0.00%        |
| Solar Car Ports  | 0.00%        |
| Upscale Solar Farm - Tanfield                              | 0.00%        |

#### d) Assigning targets to staff members:

- As a manager, you can assign specific targets to staff members via your dashboard. To do this:
  - Click on the **Assign New Target** button under the search bar.

The screenshot shows the 'All Targets' section of the dashboard. It displays a grid of 15 target cards, each with a title, current progress percentage, and a progress bar. The targets include various energy efficiency and renewable energy projects. A green button labeled '+ ASSIGN NEW TARGET' is visible at the top left of the grid.

| Target Title   | Progress (%) | Notes |
|--|--------------|-------|
| Retrofit ASHP into current DCC buildings                   | 50.00%       |       |
| Install energy efficiency and building fabric improvements | 20.00%       |       |
| Decarbonising Leisure Centres                              | 0.00%        |       |
| First Stage Decarbonisation Plans                          | 0.00%        |       |
| Surveys and Heating Decarbonisation Plans                  | 0.00%        |       |
| Install LED Lighting - DCC                                 | 3.33%        |       |
| Increase Proportion - BEMS                                 | 0.00%        |       |
| BMS - DCC Portfolio  | 0.00%        |       |
| Energy Management Responsibilities                         | 0.00%        |       |
| Insulation Maximisation                                    | 0.00%        |       |
| PV Generation Increase - DCC Estate                        | 100.00%      |       |
| Solar Array Development - Jade Business Park               | 100.00%      |       |
| Small wind turbines - Hackworth Road                       |              |       |
| Learnings From Hackworth Road                              |              |       |
| Solar and Wind Hybrid - Joint                              |              |       |
| Solar Car Ports  |              |       |
| Upscale Solar Farm   |              |       |

- On the window opened, select the target and the staff to assign it to, and then click **Confirm Selection**.

The screenshot shows the 'Assign Target' modal dialog box overlaid on the main dashboard. The dialog has two dropdown menus: 'Select Target:' (set to 'Increase Proportion - BEMS') and 'Select Staff:' (set to 'newUser@example.com'). Below these is a list titled 'Assigned Targets for newUser@example.com' which contains five targets: 'Decarbonising Leisure Centres', 'Increase Proportion - BEMS', 'BMS - DCC Portfolio', 'Energy Management Responsibilities', and 'PV Generation Increase - DCC Estate'. At the bottom of the dialog are three buttons: 'Confirm Selection' (green), 'Remove Target' (red), and 'Close' (grey).