The Terminal
User Manual for Coast Capital

General Information

Overview

The aim of our project is to simplify the system Coast Capital uses for capturing contractor data. Their current system requires tedious manual data entry and complex spreadsheet manipulation, and we want to provide a better method of visualization, management and maintenance. We will be building will be an online web application designed for ease of use and powerful data analysis. The application aims to make it a straightforward process to add, edit, and visualize contractor data.

Goals

Our application will be easy to learn for new users such that there is not a long ramp-up period for using it in comparison to using excel spreadsheets. Furthermore, since our application is an online web tool, all the contractor data within it will always be the most up to date data available so no two users are viewing different data. The goal will be to implement the following features: a data filtering system, reports visualization, the ability to add or edit contractor data, and an admin panel for admin-specific tasks.

Using the System

Login Page

The login page is presented to users and administrators when accessing The Terminal's web interface prior to login, and when their session or password has expired. The user logs into the system by entering a login name and password in the text input fields provided, then selects the **login** button. On successful login, all types of users are presented with the Dashboard. If incorrect or outdated data is entered, an appropriate error message will be displayed.

Users not registered with The Terminal's web interface must go through an administrator to get login details. An administrator will provide a username and password for users to login. Passwords are case sensitive, require a capital letter, a symbol, a number and must be eight characters in total.

Dashboard and Navigation Bar

The homepage is a dashboard that contains buttons to access all the pages present in the system. The user can select any button to be redirected to the desired page. They can also do this using the **navigation bar** on the left side, which will be visible on all pages. The navigation bar also has the **admin panel**, which will only be visible to users with admin permissions.

Data Filtering System and Reports

We used the same tool for the data filtering system (pivot table) and the reports section. There are many functions a user can execute with this tool. The "show/hide tutorial' button has a tutorial with a step-by-step guide that user can follow to understand the tool.
The tool has many options, including exporting documents as a TSV. To do so, they need to select the "Exportable TSV" option from the table dropdown.

While displaying charts, the user can hover to the top left corner of the chart and select from a range of options that allow the user to carry out different operations. The user can:

- Download the plot as a png
- Save and edit the plot in cloud
- Zooming into a specific range
- Panning the chart
- Select an area (box and freestyle)
- Autoscale or reset the axes
- Toggle the spike line from the axes
- Show data on hovering over the graph

Add and Edit Contractor

The user can add contractors by selecting the **add contractor** button on the navigation bar. To do so, they need to fill all the required contractor information along with the necessary engagement contract information. To add an engagement contract, select the **Add Additional Contract** button and then select the **Add Contract** button to add the contractor to the system. In case the wrong information has been entered, the user can select the **Clear Fields** button. If the user has accidentally added an additional contract they can remove it by selecting the **Remove Additional Contract** button.

The edit contractor page works exactly the same way, however, you cannot access this page from the navigation bar. This can only be accessed from the **Contractor Info** page. To edit a contractor, you can enter the Contractor's name in the search bar above the contractor information table, and then click on the edit icon to the left of the contractor's name.

Admin Panel

Any user with admin privileges can access the admin panel. It can be seen to all admins as a button on the navigation bar. After selecting the button, admins are redirected to a panel similar to the dashboard. It includes the various tables that the admin can access and edit:

- HR Roles

- Skills
- FX table
- Pay Grades
- Hiring Managers
- Users

For every table other than the FX table, the admin can add and edit the rows of the table. These values are then used to pre-populate the dropdowns available in the add/edit contractor page.

For the users table, the admin can also delete users except themselves.