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2017 COS 301 Project User Manual

TEAM CODE 9

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1 Introduction

This is the user manual for installing and setting up the project management system for KPMG. This manual contains instructions on how to download and install the server and database. This manual will also give you a basic understanding for how to create new employees and create projects.

This manual will currently not show you how to use the entire system because the system is still in pre-alpha

2 Installation

2.1 Installing MongoDB

- Go to <https://www.mongodb.com/download-center#community> and download MongoDB for your respective operating system.
- Install MongoDB (It will probably be installed in ProgramFiles/Mongo)

2.2 Starting MongoDB

2.2.1 For Windows

- Open command prompt
- Type `cd /`
- Then navigate to the bin folder in the Mongo folder (usually is `cd C:/Program Files/MongoDB/Server/3.2/bin`)
- Type `mongod`. MongoDB will now be running.
- **Since our system is in pre-alpha we do not have an importable database as we are still doing testing and the database still contains dummy data therefore the DB you will be using is empty.**

2.3 Installing NodeJS

- GO to <https://nodejs.org/en/download/> and download NodeJS for your respective operating system.
- Install NodeJS

2.4 Installing dependencies

- Go to <https://github.com/Code9Developers/Back-End> and click on the **Clone or Download** button, then click download ZIP to download our repo.
- Unzip the repo and place it in a location that you would like to keep the system.
- Open command prompt (assuming windows) and navigate to the repo until you in the folder with the package.json
- Then type *npm install*. This will install all the packages required to run the system.

2.5 Starting the server

- After all the packages are installed, type *npm run dev*. This will start the server (assuming MongoDB is still running).
- The server will now let you know that it is connected to the database and you can access the website on port 4000.
- To access the website type ***https://localhost:4000***

3 Using the System

The system is currently still in development but the core functionality can still be used. **Note that the routing authentication has been turned off, this is due to testing purposes but the functionality is there**

3.1 Login page

1. Request type: GET
2. URL: <https://localhost:4000/login> or <https://localhost:4000>

This is the login page where a manager, administrator or employee can login and will be routed to the relevant page. When the respective user logs in it will route to the respective page depending on that user's role.

1. Project Manager: Project creation page
2. Administrator: All employees page
3. Employee: User dashboard page

3.2 Admin pages(If an administrator logs in)

3.2.1 Admin Page

1. Request type: GET
2. URL: <https://localhost:4000/admin>

Description

On this page an Admin user will be allowed to create a new employee with all the relevant information. Once submit button is clicked a POST request will be sent to the server, the employee will then be stored in the users collection in the database. When you click on the submit button it will create the project and then route the logged in user to the employees page which will display all employees on the KPMG system.

Functions

On this page when the submit button is clicked it will send a request to store all the information in the page. The employee that is created will then be stored in the database and now can be assigned to a project. After that the page will then route to the employees page(<https://localhost:4000/employees>) which will display all employees that are registered.

The screenshot shows a web application interface for KPMG. On the left is a dark blue sidebar with the KPMG logo, a user profile for 'Xerxes Xenon', and navigation links for 'Home' and 'Admin'. The main content area is titled 'Registration Form'. It contains several input fields and dropdown menus: 'Employee ID' (with a calendar icon), 'Role' (dropdown), 'First Name' (text), 'Last Name' (text), 'Email' (text), 'Contact Number' (text), 'Position' (dropdown with 'Senior Analyst' selected), 'Employment Length (in years)' (text), and 'Past Projects' (dropdown with 'Select Past Projects' selected). There is also a 'Skill Tags' section with buttons for 'MS Office', 'Accounting Skills', and 'Auditor', followed by an 'add a tag' button. A 'Submit' button is located at the bottom left of the form. The top right of the dashboard shows a notification bell with '0' and the user name 'Xerxes Xenon'.

3.2.2 Employees Page

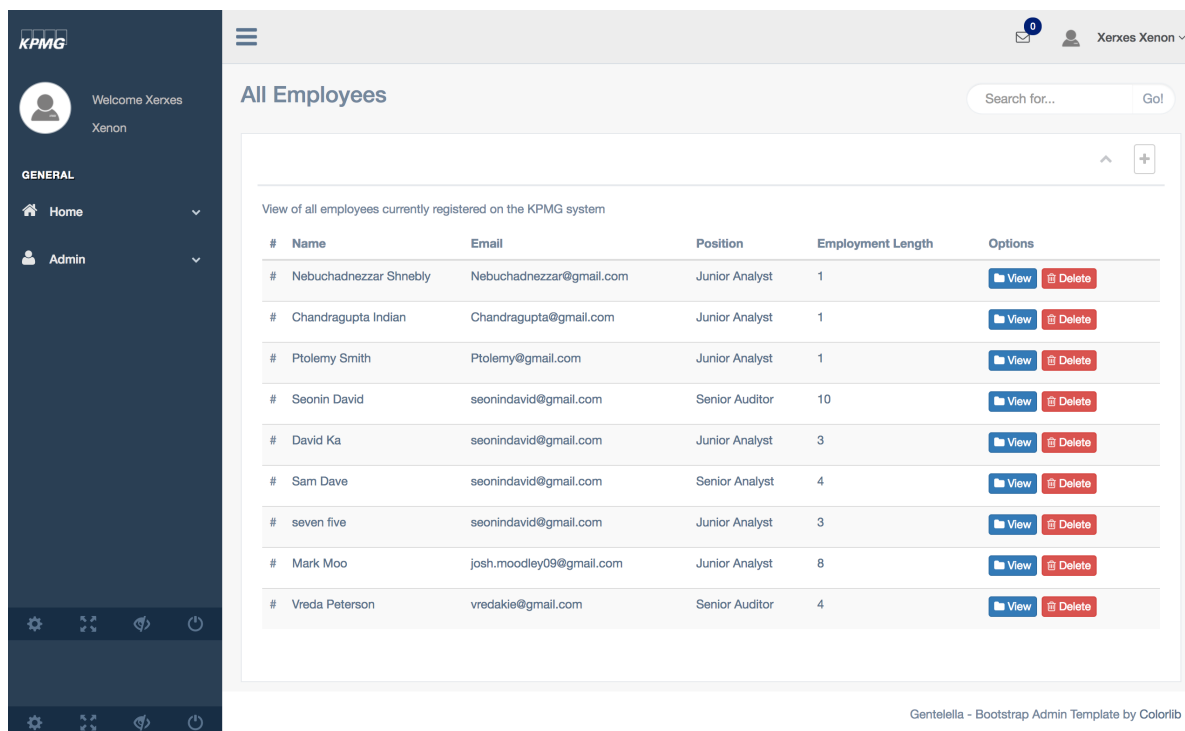
1. Request type: GET
2. URL: `https://localhost:4000/employees`

Description

This page displays all the registered employees on the system.

Functions

When the page loads it will call a function to get all the employee that are currently stored on the system. The administrator can click the view button and it will then route to the employees profile page where all the employees information can be seen.



All Employees

Search for... Go!

View of all employees currently registered on the KPMG system

#	Name	Email	Position	Employment Length	Options
#	Nebuchadnezzar Shneby	Nebuchadnezzar@gmail.com	Junior Analyst	1	View Delete
#	Chandragupta Indian	Chandragupta@gmail.com	Junior Analyst	1	View Delete
#	Ptolemy Smith	Ptolemy@gmail.com	Junior Analyst	1	View Delete
#	Seonin David	seonindavid@gmail.com	Senior Auditor	10	View Delete
#	David Ka	seonindavid@gmail.com	Junior Analyst	3	View Delete
#	Sam Dave	seonindavid@gmail.com	Senior Analyst	4	View Delete
#	seven five	seonindavid@gmail.com	Junior Analyst	3	View Delete
#	Mark Moo	josh.moodley09@gmail.com	Junior Analyst	8	View Delete
#	Vreda Peterson	vredakie@gmail.com	Senior Auditor	4	View Delete

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3.3 Project pages (If a project manager logs in)

3.3.1 Project Creation Page

1. Request type: GET
2. URL: `https://localhost:4000/project_creation`

Description

On this page a manager can create the project. The manager will be required to enter all information relevant to the project. The manager will also have to select the number of employees that is required for the project. When the allocate employees button is clicked, the algorithm will then return the best suited employees for the project after taking many factors into account. The manager can then choose to remove employees from the project but this will have to go through the chain of command to get approved. After all the information is entered and the employees are selected. A POST request will then be sent to the server to store all the information in the database. After all the information is stored the user will then be routed to the project view page where he/she can view all information regarding the project as well as insert information regarding the project.

Functions

On this page when the employee clicks on the assign employees button a request for employees will be sent to the server. The server will then call the resource allocation algorithm to get the best suited employees and then return and display in the table. When the project manager clicks on the

The screenshot shows the 'New Project' form in the KPMG admin template. The form is divided into several sections:

- Project Name:** A text input field with a required asterisk.
- Project Date:** Two date input fields for 'Start Date' and 'End Date', both with a required asterisk and a placeholder 'yyyy/mm/dd'.
- Project Description:** A text area with a required asterisk and a note '(minimum of 20 characters, max of 150)'.
- Employee Allocation:** A slider control ranging from 0 to 50, with a 'Project Budget' field set to 'R 0.00' and an 'Allocate Employees' button.
- Project Owner:** A text input field with a required asterisk.
- Project Owner Email:** A text input field with a required asterisk.
- Contact Number:** A text input field with a required asterisk.
- Skill Tags:** A section with three tags: 'MS Office', 'Accounting Skills', and 'Auditor', each with a close button (x). There is also an 'add a tag' button.
- Create Project:** A button at the bottom of the form.

The footer of the page reads 'Gentelella - Bootstrap Admin Template by Colorlib'.

3.3.2 Projects Page

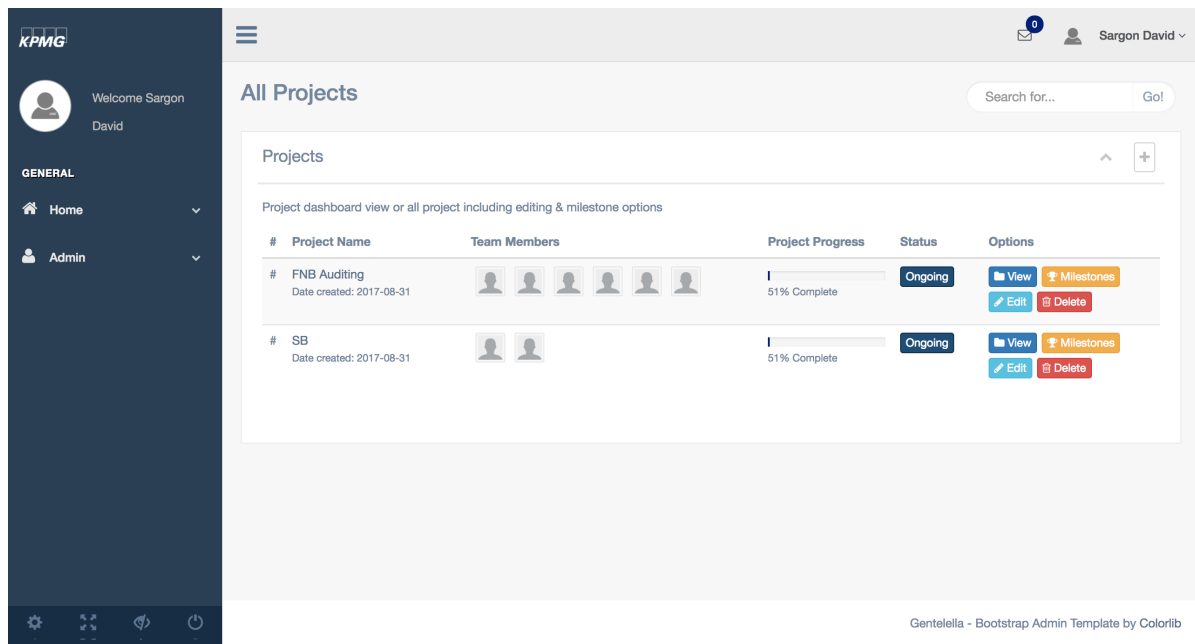
1. Request type: GET
2. URL: `https://localhost:4000/projects`

Description

This page displays all the projects that are currently active. From this page a project manager will be able to view the active projects as well as some brief details about the project such as date created and project start date. At the far left of the page there are four buttons, each button routes to the page to do the functionality described by the button.

Functions

1. **Click View Button-** When this button is clicked it will send a GET request to the server to display the project view page of the project that was clicked (It sends the project ID in the get request so it only displays the appropriate project.)
2. **Click Milestones Button-** This button will route the manager to the milestones page where the manager can add milestones to the project.
3. **Click Edit Button-** This page will route the manager to the project edit page where the manager can edit parts of the project.



3.3.3 Projects View

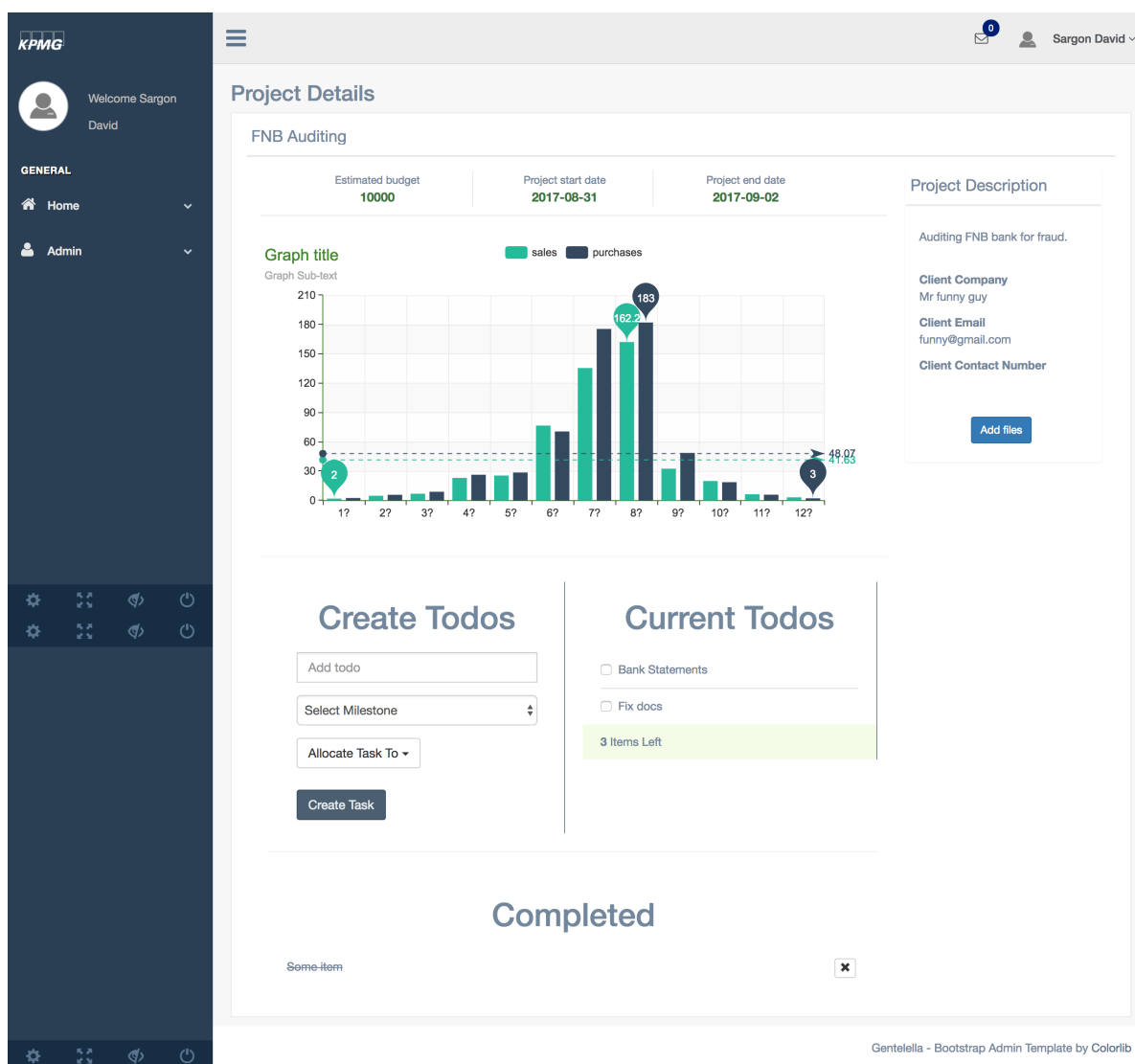
1. Request type: GET
2. URL: `https://localhost:4000/project_detail`

Description

This page displays all information about the project. The project manager can all create tasks at the bottom of the page. A manager can create as task assign it to a milestone and also assign it to multiple employees to finish. When a task is created an employee will get notified. When the task is complete the manager can just check it and it will move to the complete list.

Functions

1. Allow manager to create task. This request will be sent to the server where the task and all relevant details associated with the task will get stored in the database, after that is done notifications will be created and relevant parties will be notified.



3.3.4 Projects Edit Page

1. Request type: GET
2. URL: https://localhost:4000/project_edit

Description

This page will allow the manager to edit the current projects deadline if needed and also remove and reassign employees if ever needed.

Functions

1. Request will be send to server that will update the project end date on the database.
2. If an employee is selected to be removed, another employee of equal skill will be found.

KPMG

Welcome Sargon David

GENERAL

Home

Admin

Edit Project PROJECT NAME HERE

Current Deadline: * 2017/09/02

Change Deadline: * yyyy/mm/dd

Allocated Employees

		Name	Surname	Position	Employment Length	Projects Completed
<input type="checkbox"/>	<input type="checkbox"/>	Sargon	David	Senior Analyst	1	
	<input type="checkbox"/>	Nebuchadnezzar	Shneby	Junior Analyst	1	
	<input type="checkbox"/>	Chandragupta	Indian	Junior Analyst	1	
	<input type="checkbox"/>	Ptolemy	Smith	Junior Analyst	1	
	<input type="checkbox"/>	Seonin	David	Senior Auditor	10	project 1,project 6

Remove Selection

Update Project

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3.3.5 Milestones Page

1. Request type: GET
2. URL: https://localhost:4000/project_milestone

Description

This page will allow a project manager to create a new milestone for the project and give it the deadline date.

Functions

1. Request will be sent to server to store new milestone in database
2. Now manager can assign tasks and employees to that milestone.

KPMG

Welcome Sargon David

GENERAL

Home

Admin

Project Milestones asd

Milestone Name: *

End Date: yyyy/mm/dd

Create Milestone

Line Graph

Subtitle

Intent Pre-order Deal

1,500
1,200
900
600
300
0

Mon Tue Wed Thu Fri Sat Sun

Milestones

Demo 1
Deadline: 2017-09-01

Review
Deadline: 2017-09-02

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3.4 Employee pages (If an employee logs in)

3.4.1 Employee dashboard

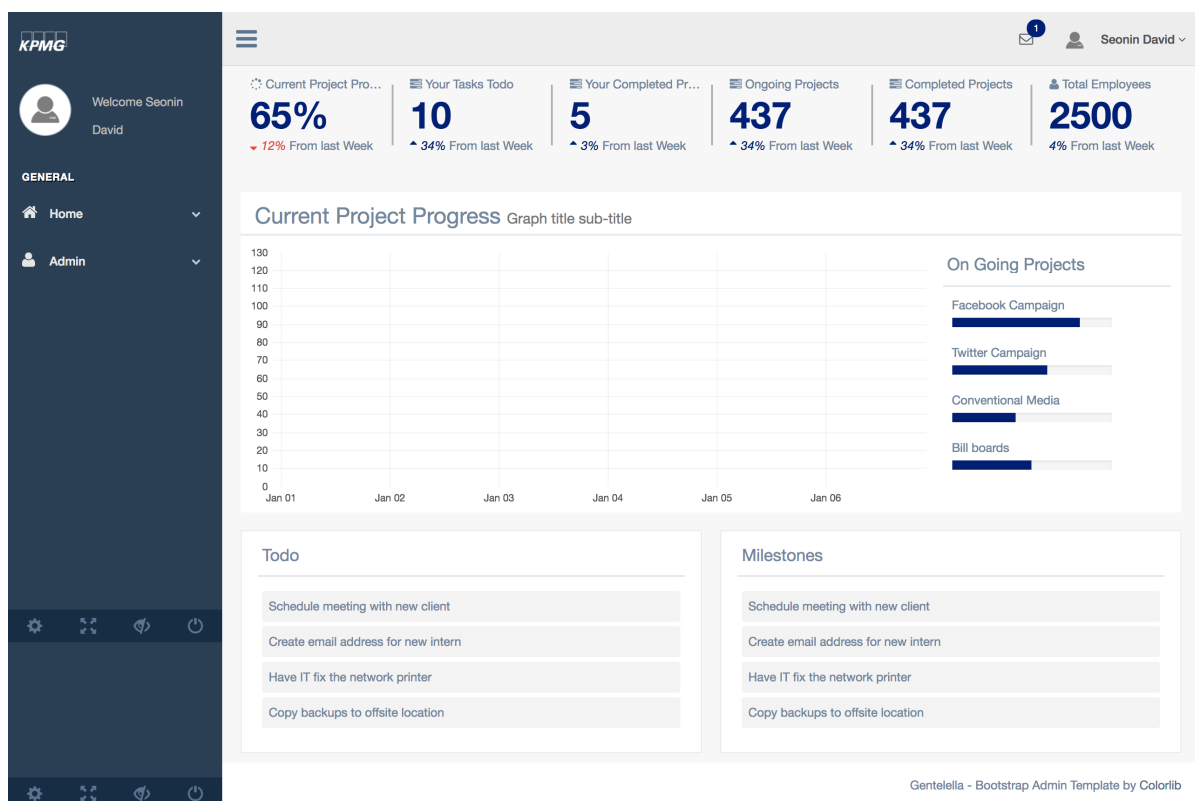
1. Request type: GET
2. URL: https://localhost:4000/user_dashboard

Description

This page displays a brief overview of the employee's projects and also some analytic data regarding the current employees project.

Functions

1. GET request to get the project data



3.4.2 Employee calendar page

1. Request type: GET
2. URL: <https://localhost:4000/calendar>

Description

Will display all the events the employee has. Project events and personal events.

Functions

1. The employee can also click on a day and create an event(as long as that event does not conflict with the project.)

KPMG

Welcome Seonin David

GENERAL

Home

Admin

Calendar

Click to add/edit events

Search for...

Go!

Calendar Events

<>today

August 2017

monthweekdaylist

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

FNB Auditing

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