Executor User Manual

SalProjects Application - Operational Manual for Executor Role

Version: 1.0

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Target Audience: Executor Users

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1. Role Overview

1.1 Your Role

As an **Executor**, you are responsible for:

- Creating and managing project proposals

- Submitting projects for approval

- Creating and submitting monthly reports for approved projects

- Creating quarterly, half-yearly, and annual aggregated reports

- Managing project budgets and expenses

- Tracking project progress and activities

1.2 Access Level

- You can view and edit **only your own projects** (projects where you are the owner or in-charge)
- You can create monthly reports for **approved projects** only
- You have access to your activity history and profile settings
- You can download project and report documents in PDF/DOC formats

1.3 Project Access Rules

You can access projects where:
- You are the **owner** (`user_id` matches your user ID), OR
- You are the **in-charge** (`in_charge` field matches your user ID)

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2. Getting Started

2.1 Logging In

1. Navigate to the application login page
2. Enter your **email address** and **password**
3. Click the **Login** button
4. You will be redirected to your dashboard upon successful login

2.2 First Login Steps

1. **Change Your Password** (Recommended)
- Click on your profile name in the top-right corner
- Select **Profile** or **Change Password**
- Enter your current password and new password
- Click **Update Password**

2. **Review Your Profile Information**
- Ensure your name, email, phone number, and center information are correct
- Update any incorrect information if needed

3. **Familiarize Yourself with the Dashboard**
- Review the dashboard widgets
- Check for any pending actions or notifications

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3. Dashboard Overview

3.1 Dashboard Sections

Your dashboard provides an overview of:

1. **Project Budgets Overview** - Summary of budget utilization across your projects
2. **Projects Requiring Attention** - Projects that need your action
3. **Reports Requiring Attention** - Reports that need to be created or submitted
4. **Action Items** - Pending tasks and deadlines
5. **Report Status Summary** - Overview of all report statuses
6. **Budget Analytics Charts** - Visual representation of budget data
7. **Project Status Visualization** - Charts showing project distribution by status
8. **Report Analytics Charts** - Visual representation of reporting data
9. **Expense Trends Charts** - Charts showing expense patterns over time

3.2 Dashboard Navigation

- **Sidebar Menu:** Located on the left side, provides access to all features
- **Top Navigation:** Contains profile menu, notifications, and logout
- **Main Content Area:** Displays the current page/dashboard content

3.3 Quick Actions from Dashboard

- View pending projects
- Create new project
- Create monthly report
- View approved projects
- Access notifications

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4. Project Management

4.1 Viewing Your Projects

Step 1: Click on **"Create Projects"** or **"Projects"** in the sidebar menu

Step 2: You will see a list of all your projects with the following information:

- Project ID
- Project Title
- Project Type
- Status
- Center/Location
- Budget Information
- Actions (View, Edit, Submit)

Step 3: Use filters to:

- Filter by Project Type
- Filter by Status (All, Pending, Approved, Needs Work)
- Search by project title or ID

4.2 Creating a New Project

Step 1: Navigate to Projects list and click **"Write Project"** or **"Create Project"** button

Step 2: Select Project Type

- Choose from available project types (Institutional or Individual)
- Common types include:
- Development Projects
- Livelihood Development Projects
- Education Rural-Urban-Tribal
- Residential Skill Training
- Individual - Ongoing Educational support
- Individual - Livelihood Application
- And more...

Step 3: Fill in General Information

- Project Title (Required)
- Project Type (Required - already selected)
- Place/Location (Required)
- Society Name (if applicable)
- In-Charge Person (if different from you)
- Total Beneficiaries
- Other required fields as per project type

Step 4: Add Project Details (varies by project type)

- **Objectives and Activities:** Define project objectives, expected results, risks, activities, and timeframes
- **Budget Information:** Add budget items with rates, quantities, and durations

- **Sustainability:** Add sustainability information
- **Attachments:** Upload supporting documents (PDF, DOC, images)

Step 5: Review and Save

- Review all entered information
- Click **"Save Draft"** to save without submitting, OR
- Click **"Submit"** to submit the project to your Provincial supervisor

Note: Projects must be submitted to Provincial before they can be approved by Coordinator.

4.3 Editing a Project

You can edit projects only if:

- The project status is **"draft"** or **"reverted"**
- You are the owner or in-charge of the project

Steps:

1. Go to your Projects list
2. Find the project you want to edit
3. Click **"Edit"** button
4. Make necessary changes
5. Click **"Update"** to save changes
6. If ready, click **"Submit to Provincial"** to send for approval

4.4 Submitting a Project to Provincial

Prerequisites:

- Project must be in "draft" status
- All required fields must be filled
- Budget information must be complete

Steps:

1. Open the project you want to submit
2. Review all information to ensure completeness
3. Click **"Submit to Provincial"** button
4. Confirm the submission
5. The project status will change to "submitted_to_provincial"
6. Your Provincial supervisor will review and forward to Coordinator if approved

4.5 Viewing Project Details

Steps:

1. Navigate to Projects list
2. Click on the **Project Title** or **"View"** button
3. You will see:

- Complete project information
- Budget details
- Attachments
- Comments (if any)
- Activity history
- Status timeline

4.6 Downloading Project Documents

To Download as PDF:

1. Open the project
2. Click **"Download PDF"** button
3. The PDF will be generated and downloaded

To Download as DOC:

1. Open the project
2. Click **"Download DOC"** button
3. The Word document will be generated and downloaded

4.7 Viewing Approved Projects

Steps:

1. Click **"Approved Projects"** in the sidebar or from Projects menu
2. View all projects that have been approved by Coordinator
3. Approved projects can be used to create monthly reports

4.8 Marking Project as Completed

When to use:

- When a project has reached its completion date
- When all project activities have been completed
- After consultation with your Provincial supervisor

Steps:

1. Open the approved project
2. Click **"Mark as Completed"** button

3. Confirm the action

4. The project status will change to "completed"

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5. Monthly Reporting

5.1 Overview

Monthly reports are required for all **approved projects**. You must create and submit monthly reports to track project progress, expenses, and achievements.

5.2 Creating a Monthly Report

Prerequisites:

- You must have at least one approved project

- The project must be approved by Coordinator

Steps:

Step 1: Navigate to Reports

- Click **"View Reports"** → **"Monthly Reports"** in the sidebar

- Or click **"Create Monthly Report"** from the dashboard

Step 2: Select Project

- Click **"Create Report"** button

- Select the approved project from the dropdown

- Click **"Continue"**

Step 3: Fill in Report Information

- **Reporting Period:**

- Select Report Month (1-12)

- Select Report Year

- **Basic Information:**

- Project details (auto-filled)

- Total Beneficiaries

- Goal/Objectives

- **Accounting Period:**

- Start Date

- End Date

Step 4: Add Report Details

- **Objectives and Activities:**
- Report on completed objectives
- Add activities performed
- Include activity descriptions and achievements
- **Account Details (Expenses):**
- Add expense items
- Enter amounts, descriptions
- Link to budget items if applicable
- **Photos:**
- Upload activity photos (multiple photos allowed)
- Add photo descriptions
- Maximum file size: 5 MB per photo
- **Outlooks:**
- Add future outlook/plans
- **Attachments:**
- Upload supporting documents (optional)

Step 5: Save or Submit Report

Save as Draft:

- Click **"Save as Draft"** if you need to continue later
- Draft reports can be edited before submission
- No notification is sent when saving as draft

Submit Report:

- Review all information
- Ensure all required fields are filled
- Click **"Submit Report"**
- The report status changes to "submitted_to_provincial"
- Your Provincial supervisor will be notified

5.3 Editing a Monthly Report

You can edit reports only if:

- The report status is **"draft"** or **"underwriting"**
- You are the owner or in-charge of the project

Steps:

1. Go to Monthly Reports list
2. Find the report you want to edit (must be in draft or underwriting status)

3. Click **"Edit"** button
4. Make necessary changes
5. Click **"Update Report"** to save
6. If ready, click **"Submit"** to send to Provincial

5.4 Submitting a Report to Provincial

Prerequisites:

- Report must be in "underwriting" status
- All required information must be filled

Steps:

1. Open the report in underwriting status
2. Review all information
3. Click **"Submit to Provincial"** button
4. Confirm submission
5. Report status changes to "submitted_to_provincial"
6. Provincial supervisor receives notification

5.5 Viewing Monthly Reports

Steps:

1. Navigate to **"View Reports"** → **"Monthly Reports"**
2. You will see a list of all your monthly reports with:

- Report ID
- Project Title
- Reporting Period (Month/Year)
- Status
- Actions (View, Edit, Submit, Download)

Filter Options:

- Filter by Status (All, Draft, Underwriting, Pending, Approved)
- Filter by Project
- Filter by Reporting Period
- Search by Report ID or Project Title

5.6 Viewing Report Details

Steps:

1. Click on Report ID or **"View"** button

2. View complete report information:

- Basic information
- Objectives and activities
- Account details (expenses)
- Photos
- Outlooks
- Attachments
- Comments (if any)
- Activity history

5.7 Downloading Report Documents

To Download as PDF:

1. Open the report
2. Click **"Download PDF"** button
3. PDF will be generated and downloaded

To Download as DOC:

1. Open the report
2. Click **"Download DOC"** button
3. Word document will be generated and downloaded

5.8 Report Statuses

- **Draft:** Report is being prepared, not yet submitted
- **Underwriting:** Report is ready for review, can be edited and submitted
- **Submitted to Provincial:** Report has been submitted, awaiting Provincial review
- **Approved by Provincial:** Provincial has approved and forwarded to Coordinator
- **Approved by Coordinator:** Report is fully approved
- **Reverted:** Report has been sent back for corrections (you can edit and resubmit)

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6. Quarterly, Half-Yearly, and Annual Reports

6.1 Overview

Aggregated reports (Quarterly, Half-Yearly, Annual) provide comprehensive summaries of multiple monthly reports over a period.

6.2 Creating Quarterly Reports

Steps:

Step 1: Navigate to Reports

- Click **"View Reports"** → **"Quarterly"** in the sidebar

Step 2: Create New Quarterly Report

- Click **"Create Quarterly Report"** button
- Select the approved project
- Click **"Create"**

Step 3: Fill in Quarterly Report Information

- Select the quarter (Q1, Q2, Q3, or Q4)
- Select the year
- The system will aggregate data from monthly reports in that quarter
- Review and edit the aggregated information if needed

Step 4: Save and Review

- Review the aggregated data
- Make any necessary edits
- Click **"Save"** to save the report
- You can edit AI-generated content if needed

Step 5: Download Reports

- Click **"Export PDF"** to download as PDF
- Click **"Export Word"** to download as Word document

6.3 Creating Half-Yearly Reports

Steps:

Step 1: Navigate to Reports

- Click **"View Reports"** → **"Half-Yearly"** in the sidebar

Step 2: Create New Half-Yearly Report

- Click **"Create Half-Yearly Report"** button
- Select the approved project
- Select the half-year period (H1: Jan-Jun, H2: Jul-Dec)
- Select the year

Step 3: Fill in Report Information

- System aggregates data from monthly reports in that half-year

- Review and edit as needed

Step 4: Save and Download

- Save the report

- Download as PDF or Word document

6.4 Creating Annual Reports

Steps:

Step 1: Navigate to Reports

- Click **"View Reports"** → **"Annual"** in the sidebar

Step 2: Create New Annual Report

- Click **"Create Annual Report"** button

- Select the approved project

- Select the year

Step 3: Fill in Report Information

- System aggregates data from all monthly reports in that year

- Review comprehensive annual summary

- Edit as needed

Step 4: Save and Download

- Save the report

- Download as PDF or Word document

6.5 Comparing Reports

You can compare reports across different periods:

Steps:

1. Navigate to the report comparison section

2. Select report type (Quarterly/Half-Yearly/Annual)

3. Select the periods you want to compare

4. View side-by-side comparison

5. Download comparison report if needed

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7. Budget Management

7.1 Viewing Project Budgets

Steps:

1. Open a project (preferably approved project)

2. Navigate to **"Budget"** section or tab

3. View budget breakdown:

- Budget items by phase

- Rates and quantities

- Total amounts

- Expenses vs. Budget

- Remaining budget

7.2 Adding Expenses

Steps:

1. Open the project

2. Go to Budget section

3. Click **"Add Expense"** button

4. Fill in expense details:

- Description

- Amount

- Date

- Category/Budget item

5. Click **"Save Expense"**

6. Expenses are automatically tracked against budget

7.3 Viewing Budget Overview

From Dashboard:

- View "Project Budgets Overview" widget for summary

- See total budget, expenses, and remaining amounts

From Projects:

- Each project shows budget utilization percentage

- Visual indicators show budget health (green/yellow/red)

7.4 Exporting Budget Reports

Steps:

1. Navigate to Budget section of a project

2. Click **"Export Budget"** or **"Budget Report"**

3. Choose format:

- Excel (XLSX)

- PDF

4. Download the report

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8. Activity History

8.1 Viewing Your Activities

Steps:

1. Click **"My Activities"** in the sidebar

2. View a timeline of all your activities:

- Project creation and updates

- Report submissions

- Status changes

- Comments and interactions

- Date and time stamps

8.2 Activity History on Projects

Steps:

1. Open any project

2. Scroll to **"Activity History"** section

3. View all activities related to that project:

- Who performed the action

- What action was taken

- When it occurred

- Comments or notes

8.3 Activity History on Reports

Steps:

1. Open any report

2. Scroll to **"Activity History"** section

3. View all activities related to that report

4. Track the report's progress through the approval workflow

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9. Profile Management

9.1 Viewing Your Profile

Steps:

1. Click on your name/profile picture in the top-right corner

2. Select **"Profile"**

3. View your profile information:

- Name

- Email

- Phone

- Center

- Province

- Society Name

- Address

- Role

9.2 Updating Profile Information

Steps:

1. Go to Profile page

2. Click **"Edit"** button

3. Update the fields you want to change:

- Name

- Phone

- Address

- (Note: Email and Role cannot be changed by you)

4. Click **"Update Profile"** to save changes

9.3 Changing Password

Steps:

1. Go to Profile page

2. Click **"Change Password"** or navigate to password change section

3. Enter:

- Current Password

- New Password

- Confirm New Password

4. Click **"Update Password"**

5. You will be logged out and need to login with new password

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10. Notifications

10.1 Viewing Notifications

Steps:

1. Click the **notification bell icon** in the top navigation

2. View list of notifications:

- Project approvals/rejections

- Report approvals/rejections

- Comments on projects/reports

- Reminders and alerts

10.2 Notification Types

- **Project Status Changes:** When your project is approved, rejected, or reverted

- **Report Status Changes:** When your report is approved, rejected, or reverted

- **Comments:** When someone adds a comment to your project or report

- **Reminders:** Deadlines and important dates

10.3 Managing Notifications

- Click on a notification to view details

- Click **"Mark as Read"** to mark individual notifications

- Click **"Mark All as Read"** to mark all as read

- Delete notifications you no longer need

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11. Common Workflows

11.1 Complete Project Submission Workflow

1. **Create Project**

- Fill in all required information
- Add budget, objectives, activities
- Upload attachments
- Save as draft

2. **Review Project**

- Check all information for accuracy
- Ensure budget is complete
- Verify attachments are uploaded

3. **Submit to Provincial**

- Click "Submit to Provincial"
- Project status changes to "submitted_to_provincial"
- Wait for Provincial review

4. **Address Feedback (if reverted)**

- If project is reverted, review comments
- Make necessary corrections
- Resubmit to Provincial

5. **Project Approval**

- Once approved by Coordinator, project status becomes "approved_by_coordinator"
- You can now create monthly reports for this project

11.2 Monthly Reporting Workflow

1. **Select Approved Project**

- Go to Monthly Reports
- Click "Create Report"
- Select an approved project

2. **Fill in Report**

- Enter reporting period (month/year)
- Add objectives and activities completed
- Enter expenses (account details)
- Upload photos
- Add outlooks

3. **Save as Draft (Optional)**

- Save as draft if not ready to submit
- Can edit and complete later

4. **Submit Report**

- Review all information
- Click "Submit to Provincial"
- Wait for approval

5. **Address Feedback (if reverted)**

- Review comments from Provincial/Coordinator
- Make corrections
- Resubmit report

11.3 Handling Reverted Projects/Reports

1. **Receive Notification**

- Check notifications for revert messages
- Read comments explaining what needs to be fixed

2. **Review Comments**

- Open the project/report
- Read all comments carefully
- Note specific issues mentioned

3. **Make Corrections**

- Edit the project/report
- Address each comment/issue
- Save changes

4. **Resubmit**

- After corrections, resubmit
- Add a comment explaining the changes (if needed)

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12. Troubleshooting

12.1 Common Issues and Solutions

Issue: Cannot see my projects

- **Solution:** Ensure you are logged in with the correct account. Projects are visible only to the owner or in-charge person.

Issue: Cannot edit a project

- **Solution:** Check the project status. You can only edit projects in "draft" or "reverted" status.

Issue: Cannot create monthly report

- **Solution:** Ensure the project is approved by Coordinator. Monthly reports can only be created for approved projects.

Issue: Report submission fails

- **Solution:** Check that all required fields are filled. Ensure the report is in "underwriting" status before submitting.

Issue: Cannot upload files

- **Solution:** Check file size (max 5 MB for images, larger for documents). Ensure file format is supported (PDF, DOC, DOCX, JPG, PNG).

Issue: Budget calculations seem incorrect

- **Solution:** Review budget items, rates, and quantities. Check if expenses are properly linked to budget items.

Issue: Cannot download PDF/DOC

- **Solution:** Ensure the project/report is saved. Try refreshing the page. Check if pop-up blocker is enabled.

Issue: Forgot password

- **Solution:** Click "Forgot Password" on login page. Enter your email. Follow instructions in the password reset email.

12.2 Getting Help

If you encounter issues not covered here:

1. **Contact Your Provincial Supervisor**

- They can help with project/report related questions

- They can address access or permission issues

2. **Check System Notifications**

- Important messages and updates are shown in notifications

3. **Review Activity History**

- Check activity history to understand what happened with your projects/reports

12.3 Best Practices

1. **Regular Backups**

- Save drafts frequently while creating projects/reports

- Don't wait until the last moment to submit

2. **Complete Information**

- Fill in all required fields

- Provide detailed descriptions
- Upload supporting documents

3. **Review Before Submission**

- Always review projects/reports before submitting
- Check for errors and completeness
- Ensure attachments are uploaded

4. **Respond to Feedback**

- Check notifications regularly
- Address comments and feedback promptly
- Resubmit after making corrections

5. **Keep Records**

- Download PDF/DOC versions for your records
- Maintain backup copies of important documents

Appendix A: Project Types Reference

Institutional Project Types

1. **CHILD CARE INSTITUTION** - Welfare home for children (Ongoing)
2. **Development Projects** - Application
3. **Education Rural-Urban-Tribal** - Rural/Urban/Tribal education projects
4. **Institutional Ongoing Group Educational proposal** - Group educational projects
5. **Livelihood Development Projects** - Livelihood and skill development
6. **PROJECT PROPOSAL FOR CRISIS INTERVENTION CENTER** - Crisis intervention centers
7. **NEXT PHASE - DEVELOPMENT PROPOSAL** - Continuation of development projects
8. **Residential Skill Training Proposal 2** - Residential training programs

Individual Project Types

1. **Individual - Ongoing Educational support** - Ongoing educational assistance
2. **Individual - Livelihood Application** - Individual livelihood support
3. **Individual - Access to Health** - Health access support
4. **Individual - Initial - Educational support** - Initial educational assistance

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Appendix B: Status Reference

Project Statuses

- **draft:** Project is being prepared
- **submitted_to_provincial:** Submitted to Provincial, awaiting review
- **approved_by_provincial:** Approved by Provincial, forwarded to Coordinator
- **approved_by_coordinator:** Fully approved by Coordinator
- **reverted:** Sent back for corrections
- **completed:** Project has been completed

Report Statuses

- **draft:** Report is being prepared
- **underwriting:** Ready for review, can be submitted
- **submitted_to_provincial:** Submitted to Provincial
- **approved_by_provincial:** Approved by Provincial, forwarded to Coordinator
- **approved_by_coordinator:** Fully approved
- **reverted:** Sent back for corrections

End of Executor User Manual