

# Reference Manual

**Project dashboard:**  
Track up to 4 active projects

The dashboard displays three project cards:

- #1: MajesticElegance Residency, 5678 Odense**  
Type: Residential Owner: tlf. +45 23456789  
Hours worked: Within expected  
Working hours used spent: 7500.0 Expected working hours: 10000.0  
Budget: Within budget  
Materiel expenses: 350000.0 Current budget: 450000.0  
Overall Timeline: On track  
Started on: 15.5.2023 Planned completion date: 9.2.2024  
Buttons: Update, Untrack, View project details
- #2: Precision Manufacturing Facility, 7890 Aarhus**  
Type: Industrial Owner: tlf. +45 76543210  
Hours worked: Within expected  
Working hours used spent: 12250.25 Expected working hours: 23400.5  
Budget: Within budget  
Materiel expenses: 3850000.25 Current budget: 8750000.25  
Overall Timeline: On track  
Started on: 8.10.2022 Planned completion date: 26.3.2025  
Buttons: Update, Untrack, View project details
- #3: SomeOtherTestName, 1234 TestCity**  
Type: Residential Owner: tlf. +45 12345678  
Hours worked: Over expected  
Working hours used spent: 43210.0 Expected working hours: 12345.0  
Budget: Over budget  
Materiel expenses: 432100.0 Current budget: 123456.0  
Overall Timeline: On track  
Started on: 10.12.2023 Planned completion date: 1.1.2027  
Buttons: Update, Untrack, View project details

Console: Application successfully loaded

Developed by 1st Semester Students at VIA University College, Denmark, on the Danish Software Engineering course.  
Developers are: Z. Banuri, A. Özer, E. Kadroli & K. Dashnow

Project file version: 10.12.2023  
Last HTML export: 9.12.2023

## Project Management System

Version 1.0



December 2023

## Table of contents

Introduction .....	3
Compatibility .....	3
Installation .....	4
1. Creating a new project.....	5
2. Removing/Deleting a project.....	12
3. Editing a project.....	15
4. Quick updating a tracked project .....	21
5. Getting a project overview.....	24
6. Viewing the details of existing projects .....	26
7. Viewing a progress report associated with a specific project.....	28
8. Untracking Dashboard projects.....	33
9. Applying search filters to the project view .....	36
10. Exporting project files for use on the Company Homepage .....	38
11. Adding confidential/internal only managers notes to a project. ....	40
12. Changing the default project settings.....	42
13. Preventing specific projects from being exported (Confidentiality setting).....	46

## Introduction

This reference manual is written for you, the experienced user, who already has knowledge about system operation. It is meant as a reference tool, in which you can simply look up processes and sequences should doubt arise in your daily work with the **project management system**.

These manual features step-by-step explanations supplemented with screenshots from the system, allowing you to easily follow the proper steps and procedures. You will find the table of contents below, and after that the chapters explaining different features and functionality.

**Note:** This reference manual does not explain any interactions with the project website/homepage. Instead, please see the proper reference manual detailing interactions and features for the webpage.

## Compatibility

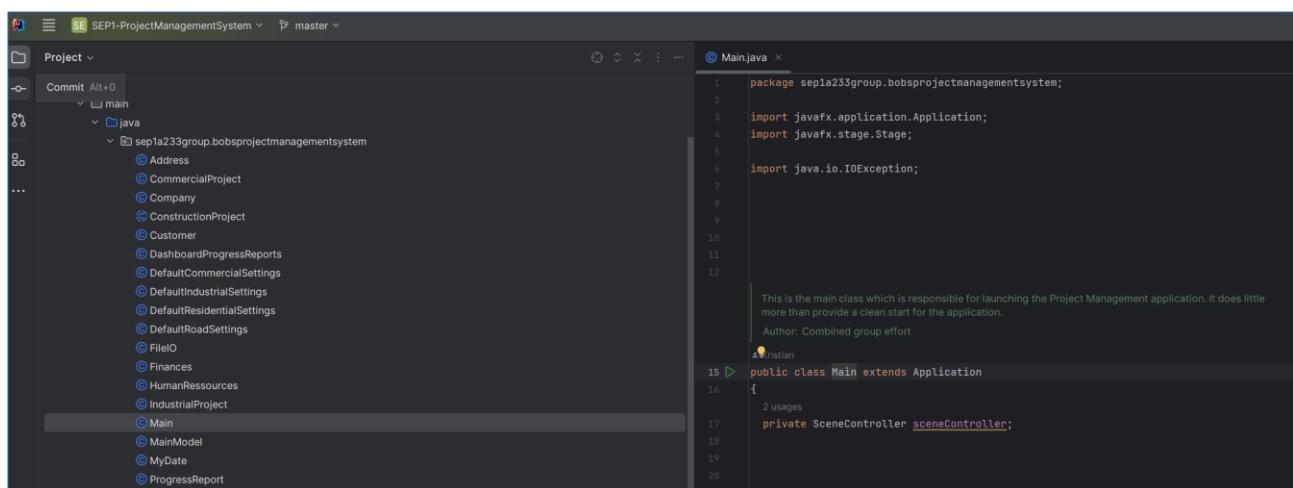
This reference manual is written for Bob's Project Management System, version 1.0. Using this manual with any future system versions may cause actual steps to be different compared to the ones laid out in this manual.

# Installation

The project management system is provided as source files, in a typical JavaFX project built with maven in the IntelliJ IDEA. In this initial release no packaged .jar deployment is available.

To run the project management system, you must follow these steps:

1. Ensure you have a working installation of IntelliJ with a Java SDK version 17.0.9 or newer installed.
2. Import the project (*New project from existing source*) and import the project files from the zipped source files.
3. When presented with the option to “create project from existing” sources, choose to “create from existing sources” and “next”.
4. Navigate to `src/main/java/sep1a233group.bobsprojectmanagementsystem/Main`.
5. Run the Main class’s constructor:



The screenshot shows the IntelliJ IDEA interface with the project 'SEPI-ProjectManagementSystem' open. The left panel displays the project structure under 'main/java/sep1a233group.bobsprojectmanagementsystem'. The right panel shows the code editor for 'Main.java'. The code is as follows:

```
1 package sep1a233group.bobsprojectmanagementsystem;
2
3 import javafx.application.Application;
4 import javafx.stage.Stage;
5
6 import java.io.IOException;
7
8
9
10
11
12
13
14
15 > public class Main extends Application
16 {
17     2 usages
18     private SceneController sceneController;
```

A tooltip in the code editor provides a brief description of the Main class: "This is the main class which is responsible for launching the Project Management application. It does little more than provide a clean start for the application." The author is listed as "Combined group effort".

Figure 1: The Main project class is highlighted above.

## 1. Creating a new project

### **Purpose:**

This chapter explains how to create a new construction project, and have this project added to the project management system.

**Note:** In version 1.0 it is not yet possible to manually attach photos to your projects. This feature is planned for future implementation. The applicable field/options will be greyed out in this version of the system.

### **Pre-conditions:**

Project management system must be properly set up, and able to run on your system.

### **Steps to take:**

Below is a short summation of the steps required. Please navigate to the following pages for a detailed walk-through for each step.

1. Select “Projects”
2. Select “New project”
3. Select a project type.
4. Enter project details.
5. Save the project.

## Step 1: Select “Projects”

First you must **click** the Projects button on the main project interface:

The screenshot shows the 'Project dashboard' interface. On the left, a sidebar menu includes 'Dashboard', 'Projects' (which is highlighted with a red box), 'Export HTML', 'Settings', and 'Exit'. The main area displays two project cards. Project #1: MajesticElegance Residency, 5678 Odense, Type Residential, Owner tlf. +45 23456789, Hours worked: Within expected, Working hours used spent: 7500.0, Budget: Within budget, Material expenses: 350000.0, Overall Timeline: On track, Started on: 15.5.2023, Planned completion date: 9.2.2024. Project #2: Precision Manufacturing Facility, 7890 Aarhus, Type Industrial, Owner tlf. +45 76543210, Hours worked: Within expected, Working hours used spent: 12250.25, Budget: Within budget, Material expenses: 3850000.25, Overall Timeline: On track, Started on: 8.10.2022, Planned completion date: 26.3.2025. At the bottom, there is a 'Console' message: 'Application successfully loaded' and footer text: 'Developed by 1st Semester Students at VIA University College, Denmark, on the Danish Software Engineering course. Development team: J. Iversen, A. Oer, L. Kofod, A. K. Elbæk'.

Figure 2: Projects button marked with a red box.

## Step 2: Select “New Project”

Now **click** on the New Project button, to open the main project creation window.

The screenshot shows the 'Project View' window. The sidebar menu includes 'Dashboard', 'Projects' (highlighted with a red box), 'Filter results', 'New project' (highlighted with a red box), 'View Details', 'Edit', 'Remove', 'Export HTML', 'Settings', and 'Exit'. The main area is a table titled 'View, create or manage projects' with columns: Type, Name, City, Status, Deadline, Budget, Expenses, Man-Hours Used, Man-Hours Total, Confidentiality, Show on Dashboard. The table lists several projects: EcoPathway Expansion Initiative (Road, Copenhagen, Completed, 6.7.2023, \$3250k, \$3150k, 16.750, 18.900.25, Non-Confidential, No); UrbanPlaza Commercial Tower (Commercial, Aarhus, Completed, 9.7.2023, \$3500k, \$3250k, 12.500, 15.000, Non-Confidential, No); MajesticElegance Residency (Residential, Odense, Ongoing, 9.2.2024, \$450k, \$350k, 7.500, 10.000, Non-Confidential, Yes); Precision Manufacturing Facility (Industrial, Aarhus, Ongoing, 26.3.2025, \$8750k, \$8500k, 12.250.25, 23.400.5, Non-Confidential, Yes); SereneHaven Residence (Residential, Aarhus, Completed, 25.11.2023, \$3500k, \$3150k, 7.200, 6.800, Non-Confidential, No); SereneHaven Residence (Residential, Vejle, Completed, 29.10.2023, \$3500k, \$2950k, 6.850, 8.000, Non-Confidential, No); NexusTech Campus Expansion (Commercial, Odense, Completed, 1.9.2022, \$2800k, \$2800k, 12.500, 12.500, Confidential, No). At the bottom, there is a 'Console' message: 'Application successfully loaded' and footer text: 'Project file version: 9.12.2023 Last HTML export: 9.12.2023'.

Figure 3: New Projects button marked with a red box.

### Step 3: Select a project type.

Now you must **choose** from one of the four displayed project types. **Select** the project type that corresponds to the project you wish to create by **clicking on the displayed image**.

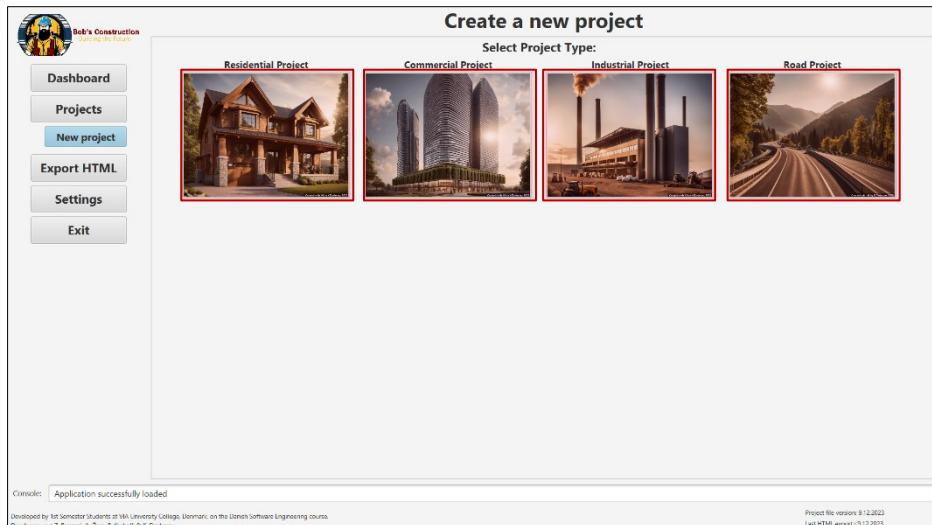


Figure 4: Project types marked with red boxes.

*Note: For the remaining steps images will assume that the “residential” project type was selected.*

*Images may thus look slightly different if you choose another project type. This is entirely expected.*

### Step 4: Enter project details.

Now all relevant data fields relating to the selected project are displayed. Information is displayed in two main sections, the upper section being the common project details – which include data fields that are common for all project types – and the project specific details at the bottom. These are **not** common for all projects.

From here you must now enter all the details for your specific project.

The screenshot shows the 'Create a new project' interface. A red box highlights the 'Customer Information' and 'Project Information' sections, which contain mandatory fields. The 'Customer Information' section includes fields for Name, Phone Number, Email, Company Name, Street, Apartment, City, ZIP code, and Country. The 'Project Information' section includes fields for Project Name, Project Description, Project photo (with a note about no picture selected), Project Duration (Start date and Est. Completion Date), Project Managers comments, Budget (in \$USD), Estimated Man Hours required, City, and Country. Below these are 'Residential Specific Data' fields for Number of Bathrooms, Number of Kitchens, Number of other rooms with Plumbing, Project Duration, Building Size, and a checkbox for 'Is project a renovation?'. At the bottom left is a 'Console' message: 'Cancel confirmed. All data fields on "Create new project" screen have been reset to default values.' At the bottom right are developer credits: 'Developed by 5th Semester Students at VIA University College, Denmark, on the Danish Software Engineering course. Developers are Z. Banjan, A. Ode, F. Kehl & C. Dannev'.

Figure 5: Project data fields inside the red box must be filled out.

If you accidentally chose the wrong project type, you now have two options:

1. Click on the **image** at the top, corresponding with the **proper project type** to change the project type. Be aware that any **entered data may be lost** upon loading a new type.

This screenshot shows the same 'Create a new project' interface as Figure 5, but with a modal dialog box in the center. The dialog has a red border and contains the text: 'WARNING: Any unsaved data will be lost. Do you wish to proceed?'. It has 'OK' and 'Cancel' buttons. The rest of the form and its sections are visible in the background.

Figure 6: Images at the top can be clicked to change project. Beware of the warning.

2. Click the **cancel** button and repeat the process from step 3.

The screenshot shows the 'Create a new project' interface. On the left is a sidebar with buttons for Dashboard, Projects, New project (which is selected and highlighted in blue), Export HTML, Settings, and Exit. The main area has tabs for Residential Project, Commercial Project, Industrial Project, and Road Project. Below these tabs is a section titled 'Enter Project Details:' with various input fields. A large red box highlights the 'Cancel' button at the bottom right of the form. The console at the bottom shows the message 'Cancel alerted.'

Figure 7: The Cancel Button is marked with a red box.

### Take special care to fill in all data fields. Optional fields are:

- Company Name
- Apartment information
- Project Managers Comment

The system will provide feedback as you enter your data. This feedback can either be a:

1. **Error:** An error is characterized by the text becoming red and a tooltip being shown when hovering over a data field. If an error occurs you must correct it to add the project to the system. Often an error will be supplemented by some text in the console at the bottom.

This screenshot shows the same 'Create a new project' interface as Figure 7, but with several fields highlighted with red borders to indicate errors. These include the 'Name' field containing '12345', the 'Phone Number' field containing 'prefix (in +45)', and the 'Email' field containing 'email'. The console at the bottom displays the message 'Error in data values while creating new project. Please review and correct!' A red box also highlights this error message. The rest of the form and sidebar are identical to Figure 7.

Figure 8: Errors can be identified by the fields marked with red boxes

2. **Warning:** A warning occurs when the data you have entered is **outside of any pre-defined margin ranges**. An example would be entering a budget of \$10 for a Residential Project which normally operates with a budget between \$100,000 and \$500,000. In such the text will become **orange** and a **tooltip** will be shown when **hovering over the data field**. Make sure to **double check these data fields** before proceeding with adding the project to the system.

The screenshot shows the 'Create a new project' interface. In the 'Enter Project Details' section, there is a 'Budget:' field containing the value '555'. This value is highlighted in orange, indicating it is outside the expected range. A tooltip appears when hovering over the field, stating: 'Entered value is outside the defined margin range (\$10K - \$50K). Double check your entry!' Below this field is a 'Create Project' button, which is currently greyed out due to the validation error.

Figure 9: A warning is displayed, relating to the budget field. Note that it is possible to ignore this warning and create the project anyways.

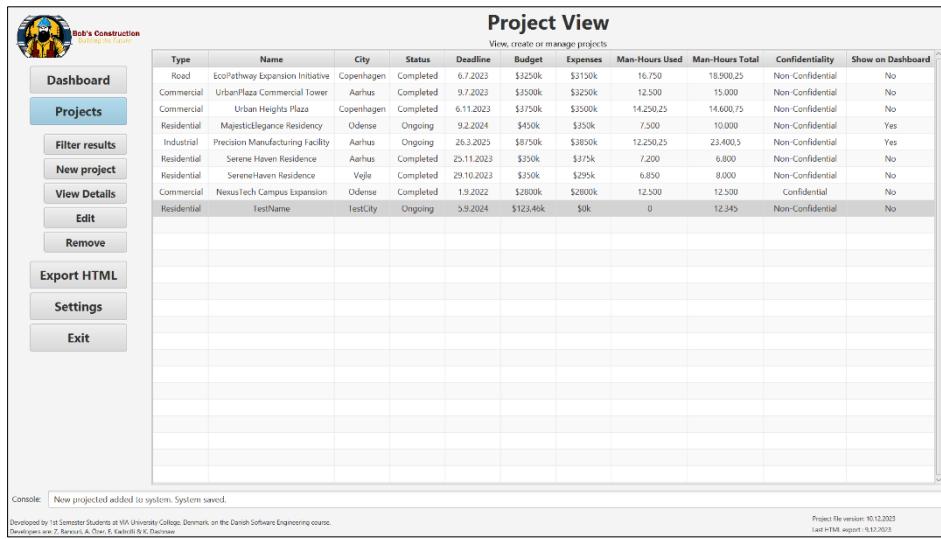
### Step 5: Save the project.

To finally **add your new project** to the system, **you** must click the **Create Project** button and **confirm** that you wish to add the project to the system. If this button is not clickable (*i.e. greyed out*) please refer to step 4 and the details relating to errors. It is likely that you haven't filled out all data fields (including start and end date), or that an error is being displayed.

The screenshot shows the 'Create a new project' interface. After clicking the 'Create Project' button, a confirmation dialog box titled 'Confirmation' appears in the center of the screen. The dialog contains the message 'Add project to system?' with two buttons: 'OK' and 'Cancel'. Both the dialog and the 'OK' button are highlighted with red boxes. The rest of the form and its fields are visible in the background.

Figure 10: First click the create project button, and then confirm. Both marked with red boxes.

**After confirming**, you will be re-directed to the main project view screen, where you can visually confirm that the project has been added to the system:



The screenshot shows the 'Project View' interface for 'Bob's Construction'. On the left, there is a sidebar with buttons for Dashboard, Projects (which is selected and highlighted in blue), Filter results, New project, View Details, Edit, Remove, Export HTML, Settings, and Exit. The main area is titled 'Project View' with the subtitle 'View, create or manage projects'. It contains a table with columns: Type, Name, City, Status, Deadline, Budget, Expenses, Man-Hours Used, Man-Hours Total, Confidentiality, and Show on Dashboard. The table lists several projects, including 'EcoPathway Expansion Initiative' (Completed), 'Urban Plaza Commercial Tower' (Completed), 'Urban Heights Plaza' (Completed), 'MajesticElegance Residency' (Ongoing), 'Precision Manufacturing Facility' (Ongoing), 'Serene Haven Residence' (Completed), 'SereneHaven Residence' (Completed), 'NeuTech Campus Expansion' (Completed), and a newly created project 'TestName' (Ongoing). At the bottom of the table, there is a message: 'Console: New project added to system. System saved.' Below the table, there is footer text: 'Developed by 1st Semester Students at VIA University College, Denmark, on the Danish Software Engineering course. Developers are Z. Bericos, A. Omer, F. Khatib & E. Denevee. Project file version: 10.12.2023. Last HTML export: 10.12.2023.'

Type	Name	City	Status	Deadline	Budget	Expenses	Man-Hours Used	Man-Hours Total	Confidentiality	Show on Dashboard
Road	EcoPathway Expansion Initiative	Copenhagen	Completed	07.7.2023	\$3250k	\$3150k	16,750	18,900,25	Non-Confidential	No
Commercial	Urban Plaza Commercial Tower	Aarhus	Completed	9.7.2023	\$3500k	\$3290k	12,500	15,000	Non-Confidential	No
Commercial	Urban Heights Plaza	Copenhagen	Completed	6.11.2023	\$3750k	\$3500k	14,250,25	14,600,75	Non-Confidential	No
Residential	MajesticElegance Residency	Odense	Ongoing	9.2.2024	\$450k	\$350k	7,500	10,000	Non-Confidential	Yes
Industrial	Precision Manufacturing Facility	Aarhus	Ongoing	26.3.2023	\$8750k	\$8850k	12,250,25	23,400,3	Non-Confidential	Yes
Residential	Serene Haven Residence	Aarhus	Completed	25.11.2023	\$350k	\$375k	7,200	6,800	Non-Confidential	No
Residential	SereneHaven Residence	Vejle	Completed	29.10.2023	\$350k	\$295k	6,850	8,000	Non-Confidential	No
Commercial	NeuTech Campus Expansion	Odense	Completed	1.9.2022	\$2800k	\$2800k	12,500	12,500	Confidential	No
Residential	TestName	TestCity	Ongoing	5.9.2024	\$123,40k	\$0k	0	12,345	Non-Confidential	No

Figure 11: The newly created project is now listed in the overview (see the bottom most entry)

## 2. Removing/Deleting a project

### **Purpose:**

This chapter explains how to remove a project from the project list.

### **Pre-conditions:**

Project management system must be properly set up, and able to run on your system.

### **Steps to take:**

Below is a short summation of the steps required. Please navigate to the following pages for a detailed walk-through for each step.

1. Select “Projects”
2. Select a project.
3. Select "Remove Project"

## Step 5: Select “Projects”.

Select “Projects” to view all the projects in the system.

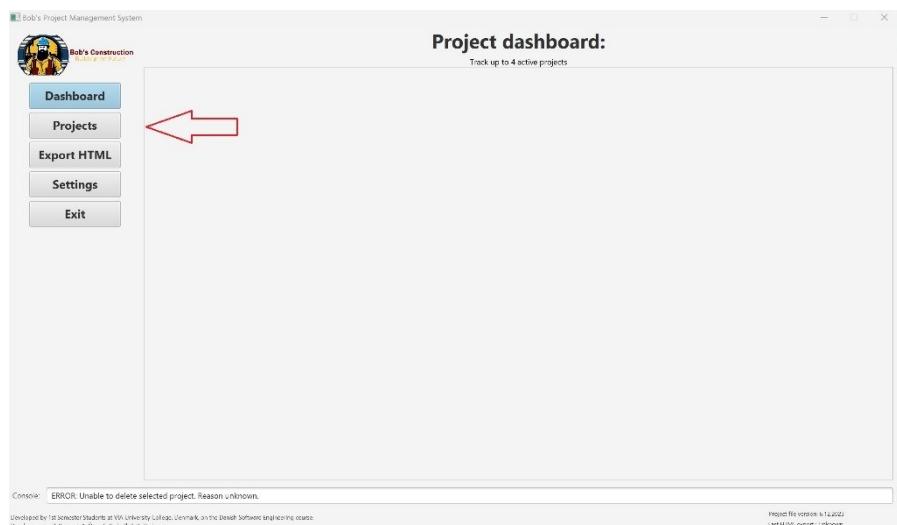


Figure 12: Select the projects” section to view all the projects in the system

## Step 5: Select a project.

Press on the specific project that you want to delete.

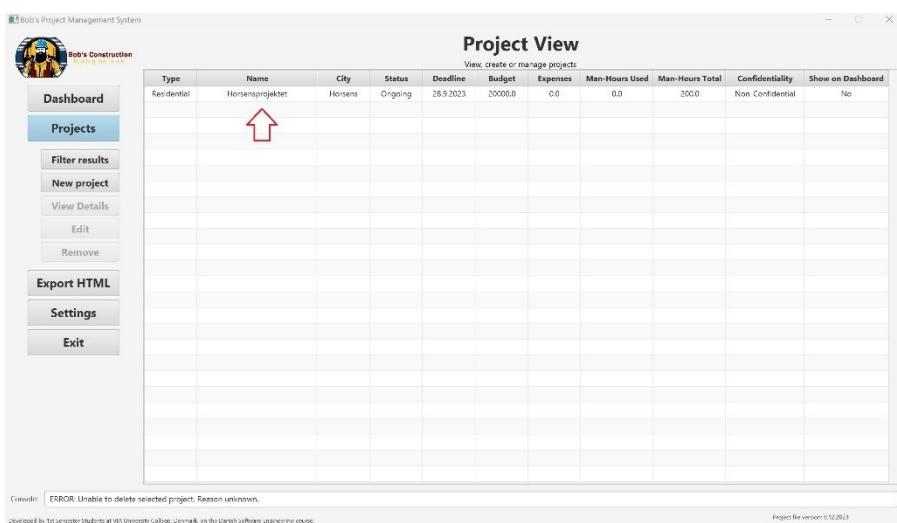


Figure 13: Select the project that is desired to remove.

## Step 5: Select "Remove Project"

Press on remove to delete the project.

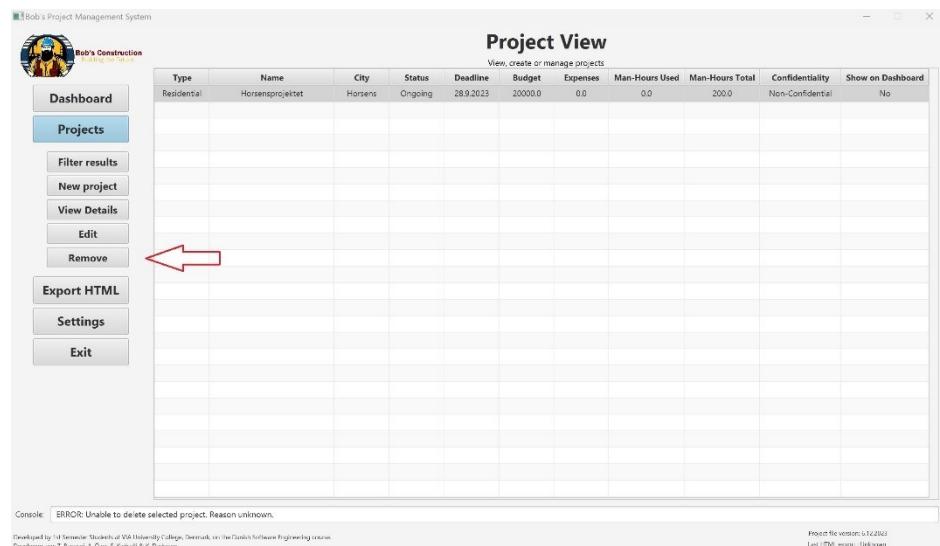


Figure 14: select Remove to delete the project that is chosen.

After you press on remove, a confirmation pop up will appear. Press ok to confirm the removing of the project.

Now the project is successfully removed.

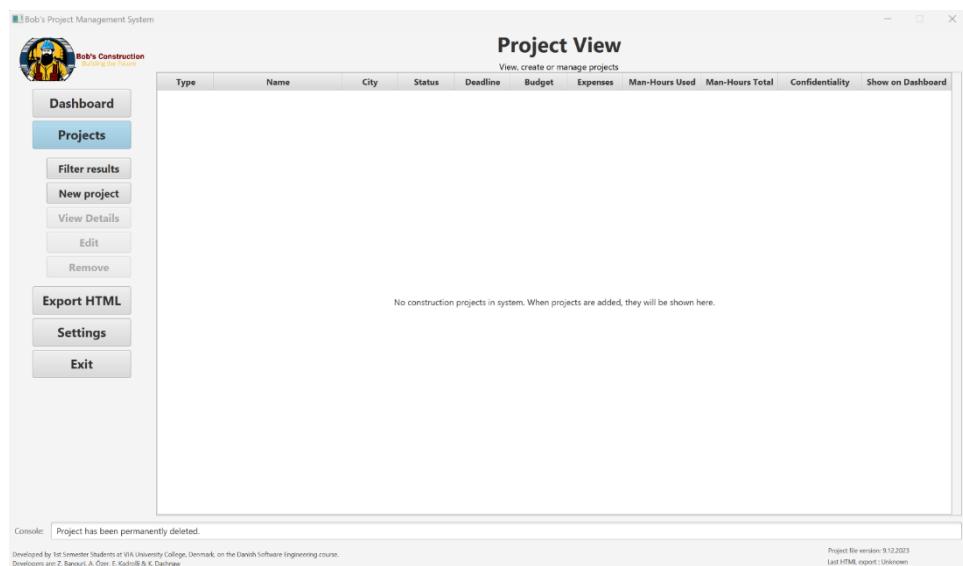


Figure 15: no projects left in the list, after the only one is deleted.

### 3. Editing a project

#### **Purpose:**

This chapter explains how to edit an already existing construction project.

**Note:** In version 1.0 it is not yet possible to manually attach photos to your projects. This feature is planned for future implementation. The applicable field/options will be greyed out in this version of the system.

#### **Pre-conditions:**

1. Project management system must be properly set up, and able to run on your system.
2. There must already exist construction projects in the system, to have anything to perform editing operations on.

#### **Steps to take:**

Below is a short summation of the steps required. Please navigate to the following pages for a detailed walk-through for each step.

1. Select “Projects”
2. Select a project to edit from the overview.
3. Click the “Edit button”
4. Enter/Edit the project details.
5. Save the project.

## Step 1: Select “Projects”

First you must click the Projects button on the main project interface:

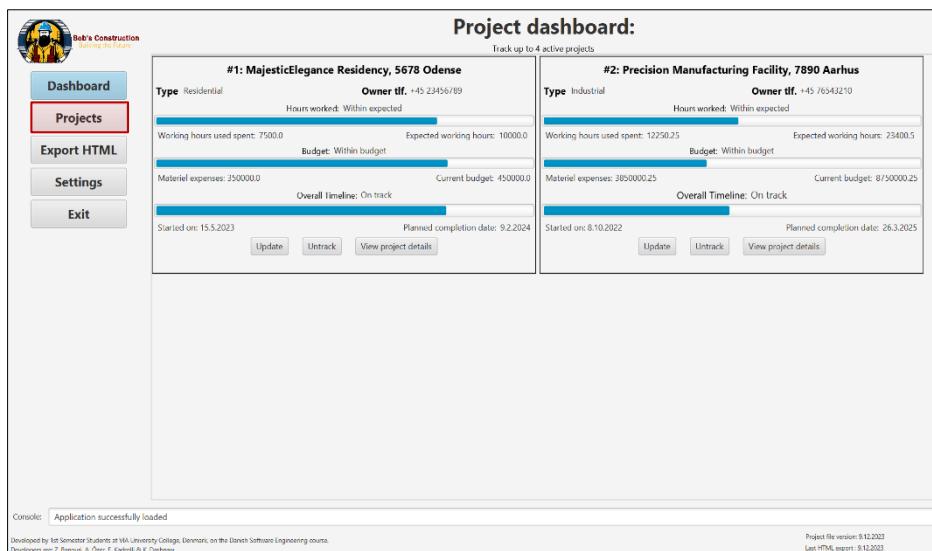


Figure 16: Projects button marked with a red box.

## Step 2: Select a project to edit from the overview.

Now you click/select the project you wish to edit from the overview.

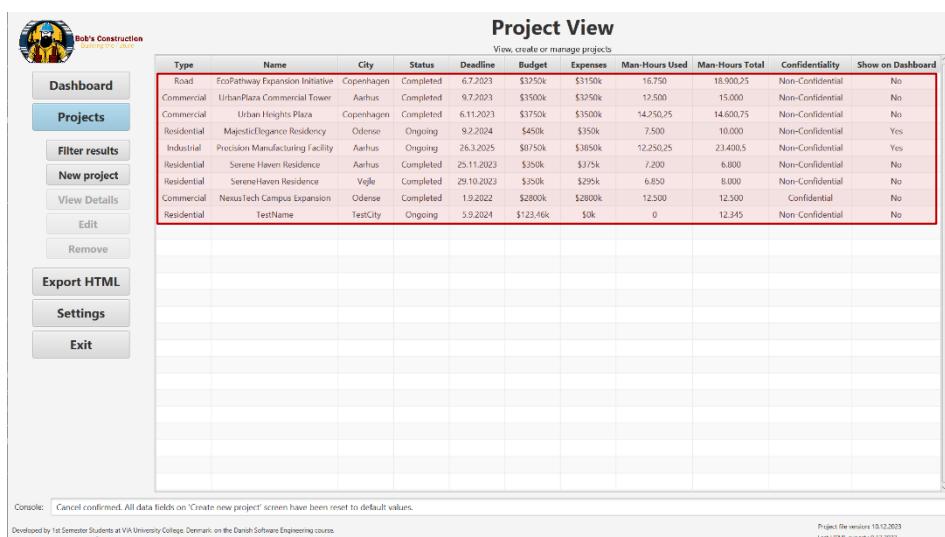


Figure 17: Select a project from the highlighted area.

### Step 3: Click the “Edit” button.

Now click the “edit” button to be directed to the edit screen, where project information can be changed.

The screenshot shows the 'Project View' interface for 'Bob's Construction'. On the left, a sidebar contains buttons for Dashboard, Projects (which is selected and highlighted in blue), Filter results, New project, View Details, Edit (highlighted with a red box), Remove, Export HTML, Settings, and Exit. The main area is titled 'Project View' with the subtitle 'View, create or manage projects'. It displays a table of projects with columns: Type, Name, City, Status, Deadline, Budget, Expenses, Man-Hours Used, Man-Hours Total, Confidentiality, and Show on Dashboard. The table data includes:

Type	Name	City	Status	Deadline	Budget	Expenses	Man-Hours Used	Man-Hours Total	Confidentiality	Show on Dashboard
Road	EcoPathway Expansion Initiative	Copenhagen	Completed	6.7.2023	\$320k	\$3150k	10,750	18,900,25	Non Confidential	No
Commercial	UrbanPlaza Commercial Tower	Aarhus	Completed	9.7.2023	\$350k	\$3250k	12,500	15,000	Non Confidential	No
Residential	Urban Heights Plaza	Copenhagen	Completed	6.11.2023	\$3750k	\$3500k	14,250,25	14,600,75	Non Confidential	No
Residential	MajesticElegance Residency	Odense	Ongoing	9.2.2024	\$450k	\$350k	7,500	10,000	Non Confidential	Yes
Industrial	Precision Manufacturing Facility	Aarhus	Ongoing	26.3.2025	\$8750k	\$3850k	12,250,25	23,400,5	Non Confidential	Yes
Residential	Serene Haven Residence	Aarhus	Completed	25.11.2023	\$350k	\$375k	7,200	6,800	Non Confidential	No
Residential	SereneHaven Residence	Vejle	Completed	29.10.2023	\$350k	\$295k	6,850	8,000	Non Confidential	No
Commercial	NexusTech Campus Expansion	Odense	Completed	1.9.2022	\$2800k	\$2800k	12,500	12,500	Confidential	No
Residential	TestName	TestCity	Ongoing	5.9.2024	\$123,46k	\$0k	0	12,345	Non Confidential	No

At the bottom, a console message says 'Console: Cancel confirmed. No changes were saved.' and credits the developers: 'Developed by 1st Semester Students at VNU University College, Denmark, on the Danish Software Engineering course. Developers are Z. Razzouk, A. Omer, R. Kadija & E. Cachava.'

Figure 128: Click on the marked edit button.

### Step 4: Edit/Enter project details.

Now all relevant data fields relating to the selected project are displayed. Information is displayed in three main sections, the upper section being the **commonly updated data fields**, the second being the **common project details** – which include data fields that are common for all project types – and the **project specific details at the bottom**. These are **not** common for all projects.

From here you can now **edit** the details for your specific project.

Figure 139: The edit view, with the residential project from the "create project" walkthrough selected.

**The system will provide feedback as you enter your data. This feedback can either be a:**

3. **Error:** An error is characterized by the text becoming red and a tooltip being shown when hovering over a data field. If an error occurs you must correct it to add the project to the system. Often an error will be supplemented by some text in the console at the bottom.

Figure 20: Errors can be identified by the fields marked with red boxes.

**4. Warning:** A warning occurs when the data you have entered is **outside of any pre-defined margin ranges**. An example would be entering a budget of \$10 for a Residential Project which normally operates with a budget between \$100,000 and \$500,000. In such the text will become **orange** and a **tooltip** will be shown when **hovering over the data field**. Make sure to **double check these data fields** before proceeding with adding the project to the system.

The screenshot shows the 'Edit project' interface. On the left, there's a sidebar with 'Bob's Construction Building Projects' logo, 'Dashboard' (selected), 'Projects' (highlighted in blue), 'Export HTML', 'Settings', and 'Exit'. The main area has tabs for 'Commonly Updated Data Fields' and 'Other Project Details'. Under 'Customer Information', fields include Name (TestName2), Phone Number (+45), Email (test@email.com), Company Name (Company Name the customer is representing), Street (TestStreet), Apartment (Customer apartment number, if applicable), City (1234), and Country (TestCountry). There's also a 'Project Managers comments' section with a note input field. Under 'Residential Specific Data', there are fields for Number of Bathrooms (1), Number of Kitchens (1), and Number of other rooms with Plumbing (1). On the right, 'Project Information' includes Project Name (TestName), Project Description (Test), Project photo (no picture selected), Project Address (Street: TestStreet, Apartment #: 1234, City: TestCity, Country: TestCountry), and Update project date (10.12.2023 - 16.12.2027). A red box highlights the 'Project Duration' field (37) and the 'Building Size' field (12345). A tooltip in the 'Building Size' field states: 'Entered value is outside the standard margin range (8 - 12) Double check your entry'.

Figure 21: A warning is displayed, relating to the project duration field. Note that it is possible to ignore this warning and save the project anyways.

## Step 5: Save the project.

To finally **add your new project** to the system, **you** must click the **Save Changes** button and **confirm** that you wish to save the changes. If this button is not clickable (*i.e. greyed out*) please refer to step 4 and the details relating to errors. It is likely that you haven't filled out all data fields (including start and end date), or that an error is being displayed.

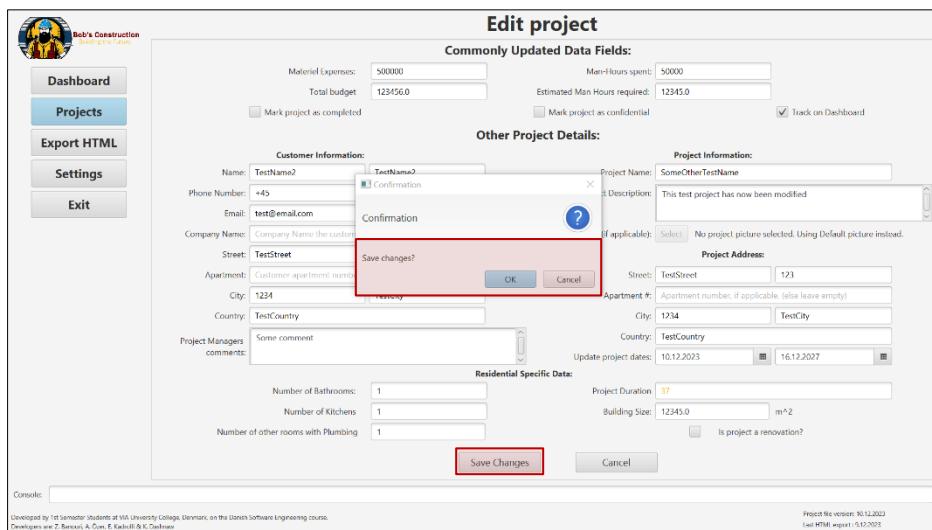


Figure 14: First click the "Save Changes button". Then confirm the choice in the pop-up window.

**After confirming**, you will be re-directed to the main project view screen, where you can visually confirm that the project has been edited:

Project View											
View, create or manage projects											
Type	Name	City	Status	Deadline	Budget	Expenses	Man-Hours Used	Man-Hours Total	Confidentiality	Show on Dashboard	
Road	EcoPathway Expansion Initiative	Copenhagen	Completed	6.7.2023	\$2250k	\$2150k	16,750	18,500,25	Non-Confidential	No	
Commercial	Urban Heights Plaza	Aarhus	Completed	9.7.2023	\$1500k	\$1250k	12,500	15,000	Non-Confidential	No	
Residential	Magnolia Luxury Residency	Odense	Ongoing	9.2.2024	\$450k	\$150k	7,500	10,000	Non-Confidential	Yes	
Industrial	Precision Manufacturing Facility	Aarhus	Ongoing	26.3.2025	\$8750k	\$3800k	12,250,25	23,400,5	Non-Confidential	Yes	
Residential	Serenity Haven Residence	Aarhus	Completed	25.11.2023	\$350k	\$315k	7,200	6,800	Non-Confidential	No	
Residential	Serenity Haven Residence	Vejle	Completed	29.10.2023	\$350k	\$295k	6,850	8,000	Non-Confidential	No	
Commercial	NexusTech Campus Expansion	Odense	Completed	19.2.2022	\$2800k	\$2800k	12,500	12,500	Confidential	No	
Residential	SomeOtherTestName	TestCity	Ongoing	1.1.2027	\$123.45k	\$500k	50,000	12,345	Non-Confidential	Yes	

Figure 23: The edited project is now listed in the overview (see the bottom most entry)

## 4. Quick updating a tracked project

### **Purpose:**

This chapter explains how to quickly update a tracked project. This feature provides the ability for you, as the manager, to quickly apply/save changes to your key projects. The fields that are possible to update in this manner are only those estimated to be most likely to change during a project period.

### **Pre-conditions:**

1. Project management system must be properly set up, and able to run on your system.
2. There must already exist construction projects in the system, to have anything to perform editing operations on.
3. There must already be projects marked for view on the Dashboard. (If not, then see the appropriate chapter on how to generate a progress report / add a project to the Dashboard).

### **Steps to take:**

Below is a short summation of the steps required. Please navigate to the following pages for a detailed walk-through for each step.

1. Click the “update” button from the main Dashboard view.
2. Enter your updated information in the displayed data fields.
3. Save the changes.

## Step 1: Click on the “update” button.

Click on the update button, attached to the project you wish to update from the main Dashboard view.

The screenshot shows the 'Project dashboard' interface. On the left is a sidebar with buttons for Dashboard, Projects, Export HTML, Settings, and Exit. The main area displays three projects:

- #1: MajesticElegance Residency, 5678 Odense**: Residential type, owner tlf. +45 23456789. Status: Within expected. Started on: 15.5.2023. Updated on: 10.12.2023. Buttons: Update (highlighted), Untrack, View project details.
- #2: Precision Manufacturing Facility, 7890 Aarhus**: Industrial type, owner tlf. +45 76543210. Status: Within expected. Started on: 8.10.2022. Updated on: 10.12.2023. Buttons: Update, Untrack, View project details.
- #3: SomeOtherTestName, 1234 TestCity**: Residential type, owner tlf. +45 12345678. Status: Over expected. Started on: 10.12.2023. Updated on: 10.12.2023. Buttons: Update (highlighted), Untrack, View project details.

At the bottom of the dashboard, there is a console message: "Console: Project successfully modified. System saved." and footer text: "Developed by 1st Semester Students at VIA University College, Denmark, on the Danish Software Engineering course. Version 1.2. Release 3. Date 2023-12-10. Last HTML export: 10.12.2023".

Figure 15: Click the update button associated with the project you wish to update. In the image update we wish to update project #3.

## Step 2: Enter your updated information.

In the displayed pop-up window, you must now enter any updated information into the fields.

**Note:** Fields are validated as described in the “create project” and “edit project” section. All data entered must be valid data (i.e. no text in a number field, and such), otherwise the “Save changes” button will be disabled until data entry has been corrected.

The screenshot shows the 'Project dashboard' with a 'Quick update' modal window overlaid on project #1. The modal has a title 'Update project' and a sub-title 'Quick update'. It contains fields for 'Material expenses' (432100), 'Budget' (123456.0), and 'Estimated Man Hours required' (12345.0). There are also checkboxes for 'Mark project as completed' (unchecked), 'Mark project as confidential' (checked), and 'Track on Dashboard' (checked). At the bottom of the modal are 'Save Changes' and 'Cancel' buttons. The background shows the details of project #1, which is the same as in Figure 15.

At the bottom of the dashboard, there is a console message: "Console: Project successfully modified. System saved." and footer text: "Developed by 1st Semester Students at VIA University College, Denmark, on the Danish Software Engineering course. Version 1.2. Release 3. Date 2023-12-10. Last HTML export: 10.12.2023".

Figure 16: Enter your data into the displayed fields, highlighted with the red box.

### Step 3: Save the changes.

Save the entered changes by clicking the “Save Changes” button.

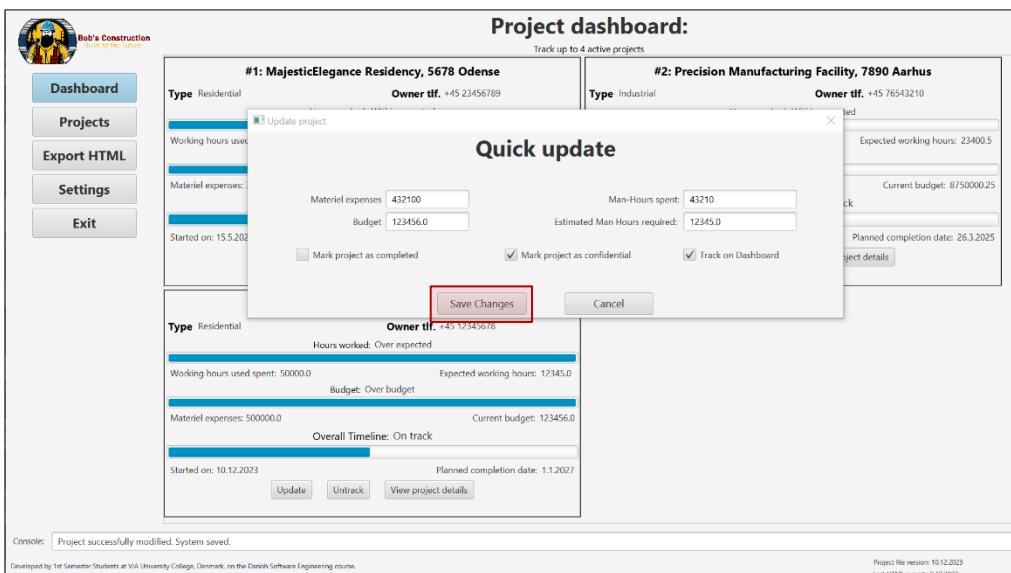


Figure 17: Save the changes by clicking the highlighted button.

You will now be **re-directed** back to the **main Dashboard** screen, where the entered changes can be observed in the displayed progress report.

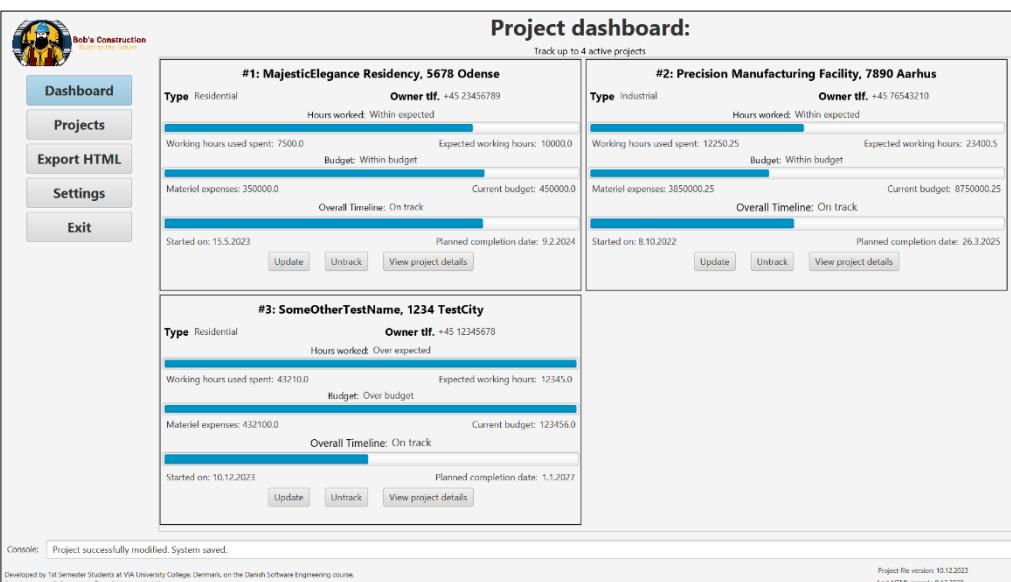


Figure 18: You are now back at the main Dashboard view.

## 5. Getting a project overview

### **Purpose:**

This chapter explains how to quickly get an overview of the projects in the system.

### **Pre-conditions:**

4. Project management system must be properly set up, and able to run on your system.
5. There must already exist construction projects in the system.

### **Steps to take:**

Below is a short summation of the steps required. Please navigate to the following pages for a detailed walk-through for each step.

1. Select “Projects.”

## Step 1: Select “Projects”

You must press on “Projects” to view the projects.

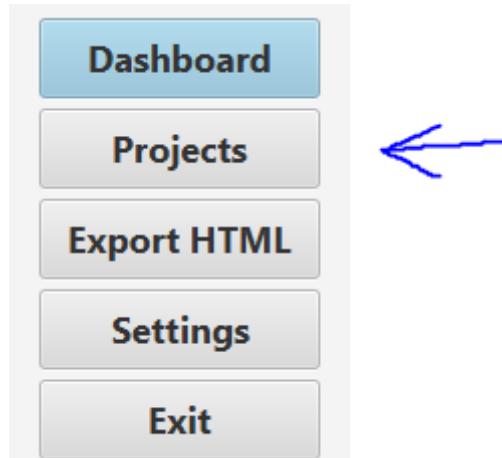


Figure 28: Press on projects section to view the projects

Now you have access to the project list, containing both ongoing and finished projects.

Bob's Project Management System

Project View  
View, create or manage projects

Type	Name	City	Status	Deadline	Budget	Expenses	Man-Hours Used	Man-Hours Total	Confidentiality	Show on Dashboard
Residential	fewqf	fwefq	Ongoing	16.9.2024	\$231,41k	\$0k	0	234	Non-Confidential	No
Commercial	wefqf	dfvaewf	Completed	14.6.2025	\$500k	\$0k	0	214	Non-Confidential	No

Console: Project successfully modified. System saved.

Developed by 1st Semester Students at VIA University College, Denmark, on the Danish Software Engineering course.  
Developers are: Z. Banou; A. Özer; E. Kadroli & K. Dashnaw

Project file version: 9.12.2023  
Last HTML export: 9.12.2023

Figure 29: viewing the project list in the system.

## 6. Viewing the details of existing projects

### **Purpose:**

This chapter explains how to get a detailed view of a specific project.

### **Pre-conditions:**

1. Project management system must be properly set up, and able to run on your system.
2. There must already exist construction projects in the system.
3. User must be in “projects” section and be able to see an overview of the projects. (Look for manual 5).

### **Steps to take:**

Below is a short summation of the steps required. Please navigate to the following pages for a detailed walk-through for each step.

1. Select a Project
2. Select “View Details”

## Step 1: Select a project.

Select a project that you want to see a detailed view of.

## Step 1: Select “View details”

Now you can press on select details. When pressed a new tab will pop up with the details of the project selected.

The screenshot shows the application's main interface. On the left, a sidebar contains several buttons: Dashboard, Projects (which is highlighted in blue), Filter results, New project, View Details, Edit, Remove, Export HTML, Settings, and Exit. The 'Projects' button is currently active. To the right of the sidebar, a large modal window titled 'Project Details' is displayed. This window is divided into sections: 'Frequently used data', 'Customer Information', 'Other Project Details', 'Project Information', and 'Commercial Specific Data'. It includes input fields for project details like name, budget, and address, along with checkboxes for marking projects as completed or confidential. A 'Cancel' button is located at the bottom right of the modal.

Figure 30 & 31: select “View Details” after choosing a project. Then the tab with the details will appear.

## 7. Viewing a progress report associated with a specific project.

### **Purpose:**

This chapter explains how to have the system generate a progress report for selected projects.

This feature is tied to the project Dashboard. To generate a progress report thus means to ensure that the project is displayed on the system dashboard.

### **Pre-conditions:**

1. Project management system must be properly set up, and able to run on your system.
2. There must already exist construction projects in the system, to have anything to perform editing operations on.

### **Steps to take:**

Below is a short summation of the steps required. Please navigate to the following pages for a detailed walk-through for each step.

1. Select “Projects”
2. Select a project a project to generate a report for (Add it to the Dashboard).
3. Click the “edit” button.
4. Tick the “Track on Dashboard” box.
5. Save the changes.
6. Navigate to the Dashboard view page.
7. View the selected progress report.

## Step 1: Select “Projects”

First you must **click** the Projects button on the main project interface:

**Project dashboard:**  
Track up to 4 active projects

#1: MajesticElegance Residency, 5678 Odense		#2: Precision Manufacturing Facility, 7890 Aarhus	
Type	Residential	Type	Industrial
Owner tlf.	+45 23456789	Owner tlf.	+45 76543210
Hours worked	Within expected	Hours worked	Within expected
Working hours used spent	7500.0	Expected working hours	10000.0
Budget	Within budget	Budget	Within budget
Materiel expenses	250000.0	Current budget	450000.0
Overall Timeline	On track	Overall Timeline	On track
Started on	15.5.2023	Planned completion date	9.2.2024
	<a href="#">Update</a>	<a href="#">Untrack</a>	<a href="#">View project details</a>
	<a href="#">Update</a>	<a href="#">Untrack</a>	<a href="#">View project details</a>

Console: Application successfully loaded  
Developed by 1st Semester Students at VIA University College, Denmark, on the Danish Software Engineering course.  
Developers are Z. Rennert, A. Ørre, E. Gadell & C. Dethmer

Project file version: 9.12.2023  
Last HTML export: 9.12.2023

Figure 32: Projects button marked with a red box.

## Step 2: Select a project to generate a report for (Add to Dashboard)

Now you **click/select** the project you wish to generate a progress report for, from the overview.

**Project View**  
View, create or manage projects

Type	Name	City	Status	Deadline	Budget	Expenses	Man-Hours Used	Man-Hours Total	Confidentiality	Show on Dashboard
Road	EcoPathway Expansion Initiative	Copenhagen	Completed	6.7.2023	\$3750k	\$3150k	16750	18900.25	Non-Confidential	No
Commercial	Urban Plaza Commercial Tower	Aarhus	Completed	9.7.2023	\$3500k	\$3250k	12500	15000	Non-Confidential	No
Residential	Urban Heights Plaza	Copenhagen	Completed	6.11.2023	\$3750k	\$3500k	14250.25	14600.75	Non-Confidential	No
Residential	MajesticElegance Residency	Odense	Ongoing	9.2.2024	\$450k	\$350k	7500	10000	Non-Confidential	Yes
Industrial	Precision Manufacturing Facility	Aarhus	Ongoing	26.3.2025	\$0750k	\$3850k	12250.25	23400.5	Non-Confidential	Yes
Residential	Serene Haven Residence	Aarhus	Completed	25.11.2023	\$350k	\$375k	7200	6800	Non-Confidential	No
Residential	SereneHaven Residence	Vejle	Completed	29.10.2023	\$350k	\$295k	6850	8000	Non-Confidential	No
Commercial	NexusTech Campus Expansion	Odense	Completed	1.9.2022	\$2800k	\$2800k	12500	12500	Confidential	No
Residential	TestName	TestCity	Ongoing	5.9.2024	\$123.45k	\$0k	0	12.345	Non-Confidential	No

Console: Cancel confirmed. All data fields on 'Create new project' screen have been reset to default values.  
Developed by 1st Semester Students at VIA University College, Denmark, on the Danish Software Engineering course.  
Developers are Z. Rennert, A. Ørre, E. Gadell & C. Dethmer

Project file version: 10.12.2023  
Last HTML export: 10.12.2023

Figure 33: Select a project from the highlighted area.

### Step 3: Click the “Edit” button.

Now click the “edit” button to be directed to the edit screen, where project information can be changed.

The screenshot shows a 'Project View' dashboard titled 'Bob's Construction'. On the left, there's a sidebar with buttons for Dashboard, Projects (which is selected), Filter results, New project, View Details, Edit (highlighted with a red box), Remove, Export HTML, Settings, and Exit. The main area displays a table of projects with columns: Type, Name, City, Status, Deadline, Budget, Expenses, Man-Hours Used, Man-Hours Total, Confidentiality, and Show on Dashboard. The first project listed is 'EcoPathway Expansion Initiative' in Copenhagen, completed on 6.7.2023, with a budget of \$3250k and expenses of \$3150k. The 'Show on Dashboard' checkbox for this project is unchecked. At the bottom of the page, there's a 'Console' section with a message about changes being saved, and a footer with developer credits and file version information.

Figure 34: Click on the marked edit button.

### Step 4: Tick the “Track on Dashboard” Checkbox.

Tick the “Track on Dashboard” checkbox, to add the selected project to the dashboard, and in the same process have a progress report generated.

The screenshot shows the 'Edit project' dialog box. It has tabs for 'Commonly Updated Data Fields', 'Other Project Details', and 'Residential Specific Data'. In the 'Commonly Updated Data Fields' tab, there are fields for Material Expenses (\$500000.0), Total budget (\$123456.0), Estimated Man Hours required (12345.0), and checkboxes for 'Mark project as completed' and 'Track on Dashboard'. In the 'Other Project Details' tab, there are sections for Customer Information (Name: TestName2, Phone Number: +45 12345678, Email: test@email.com), Project Information (Project Name: SomeOtherTestName, Description: This test project has now been modified), and Project Address (Street: TestStreet 123, Apartment #: 1234, City: TestCity, County: TestCountry). In the 'Residential Specific Data' tab, there are fields for Number of Bathrooms (1), Number of Kitchens (1), Number of other rooms with Plumbing (1), Project Duration (37), Building Size (12345.0 m²), and a checkbox for 'Is project a renovation?'. At the bottom, there are 'Save Changes' and 'Cancel' buttons. The footer includes developer credits and file version information.

Figure 19: Tick the “Track on Dashboard” box highlighted with red.

**Note:** If the checkbox is greyed out, it means that you already have the maximum number of projects tracked on your project dashboard. Please untrack one of the existing projects first. See the proper step in this reference manual for how to remove/untrack projects from the dashboard view.

### Step 5: Save the project.

Now **save** the changes by **clicking the Save Changes button**, and then **confirming** in the pop-up window.

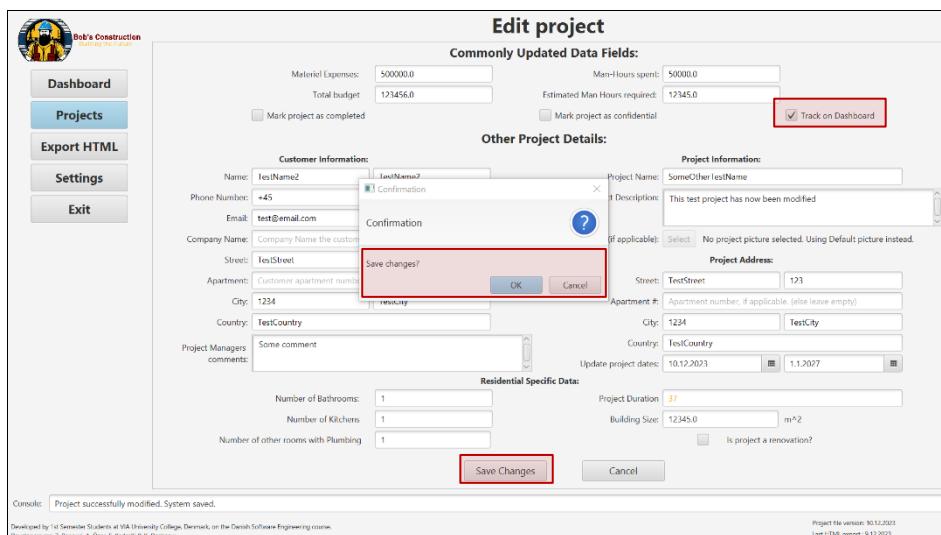


Figure 36: Save the changes and confirm.

After confirming, you will be re-directed to the main project view screen.

Project View												
Type	Name	City	Status	Deadline	Budget	Expenses	Man-Hours Used	Man-Hours Total	Confidentiality	Show on Dashboard		
Road	EcoPathway Expansion Initiative	Copenhagen	Completed	6.7.2023	\$250k	\$150k	16,750	18,900,25	Non-Confidential	No		
Commercial	Urban Plaza Commercial Tower	Aarhus	Completed	9.7.2023	\$300k	\$250k	12,500	15,000	Non-Confidential	No		
Commercial	Urban Heights Plaza	Copenhagen	Completed	6.11.2023	\$350k	\$350k	14,250,25	14,800,75	Non-Confidential	No		
Residential	MajesticElegance Residency	Odense	Ongoing	9.2.2024	\$450k	\$350k	7,500	10,000	Non-Confidential	Yes		
Industrial	Precision Manufacturing Facility	Aarhus	Ongoing	26.3.2025	\$850k	\$3850k	12,250,25	23,400,5	Non-Confidential	Yes		
Residential	Serenity Haven Residence	Aarhus	Completed	25.11.2023	\$350k	\$375k	7,200	8,800	Non-Confidential	No		
Residential	Serenity Haven Residence	Vejle	Completed	29.10.2023	\$350k	\$250k	6,650	8,000	Non-Confidential	No		
Commercial	NexusTech Campus Expansion	Odense	Completed	1.9.2022	\$2000k	\$2800k	12,500	12,500	Confidential	No		
Residential	SomeOtherTestName	TestCity	Ongoing	1.1.2027	\$123,45k	\$500k	50,000	12,345	Non-Confidential	Yes		

Figure 37: The bottom most project is the one we selected to generate a progress report for. Note the "Show on Dashboard" field says "Yes."

## Step 6: Navigate to the Dashboard.

Now click on the “Dashboard” button to be redirected to the Dashboard page.

The screenshot shows the 'Project View' interface. On the left is a sidebar with buttons for 'Dashboard' (highlighted in red), 'Projects', 'Filter results', 'New project', 'View Details', 'Edit', 'Remove', 'Export HTML', 'Settings', and 'Exit'. The main area displays a table titled 'Project View' with columns: Type, Name, City, Status, Deadline, Budget, Expenses, Man-Hours Used, Man-Hours Total, Confidentiality, and Show on Dashboard. The table lists various projects like 'EcoPathway Expansion Initiative' and 'Precision Manufacturing Facility'. At the bottom of the main area, there's a 'Console' message: 'Project successfully modified. System saved.' and footer text: 'Developed by 1st Semester Students at VIA University College, Denmark, on the Danish Software Engineering course. Developers are Z. Bonnici, A. Omer, E. Karolik & K. Dashra'. The status bar indicates 'Project file version: 10.12.2023' and 'Last HTML export: 9.12.2023'.

Figure 38: Dashboard button highlighted in red.

## Step 7: View the progress report.

You can now view, and visually extract, the progress report information relating to the selected projects directly from the Dashboard view. This view is also the first view loaded every time the application is started and provides a quick overview over your key projects.

The screenshot shows the 'Project dashboard' with three projects listed: #1: MajesticElegance Residency, 5678 Odense; #2: Precision Manufacturing Facility, 7890 Aarhus; and #3: SomeOtherTestName, 1234 TestCity. The third project (#3) is highlighted with a red box. Each project card contains details like type, owner, hours worked, budget, material expenses, overall timeline, start date, and planned completion date. Buttons for 'Update', 'Untrack', and 'View project details' are also present. The bottom of the screen shows a 'Console' message: 'Project successfully modified. System saved.' and footer text: 'Developed by 1st Semester Students at VIA University College, Denmark, on the Danish Software Engineering course. Developers are Z. Bonnici, A. Omer, E. Karolik & K. Dashra'. The status bar indicates 'Project file version: 10.12.2023' and 'Last HTML export: 9.12.2023'.

Figure 3209: The project we wanted to view a progress report, is in the red highlighted area.

## 8. Untracking Dashboard projects

### **Purpose:**

This chapter explains how to remove projects from the Dashboard overview. Parts of this is also explained in chapter 7.

### **Pre-conditions:**

1. Project management system must be properly set up, and able to run on your system.
2. There must already exist construction projects in the system, to have anything to perform editing operations on.

### **Steps to take:**

Below is a short summation of the steps required. Please navigate to the following pages for a detailed walk-through for each step.

1. Select “Projects”
2. Select a project a project to generate a report for (Add it to the Dashboard).
3. Click the “edit” button.
4. Tick the “Track on Dashboard” box.
5. Save the changes.
6. Navigate to the Dashboard view page.
7. View the selected progress report.

## Step 1A: From the Dashboard view, click “Untrack.”

From the Dashboard view, click on the **Untrack** button associated with the project you wish to remove from the overview.

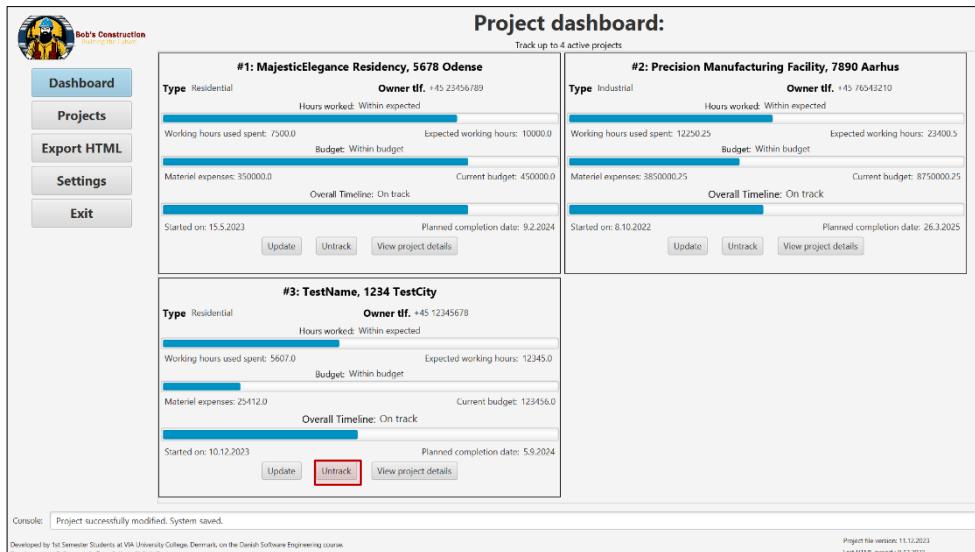


Figure 40: Untrack button highlighted in red.

## Step 1B: Follow the “edit project” sequence.

Another way to remove projects from the project view is to simply follow the “edit project” sequence explained in chapter 3 and modify the appropriate data field that is displayed during that process.

Please refer to that chapter for more details.

## Step 2A: Project has now been removed from the Dashboard.

The selected project has now been removed from the project Dashboard.

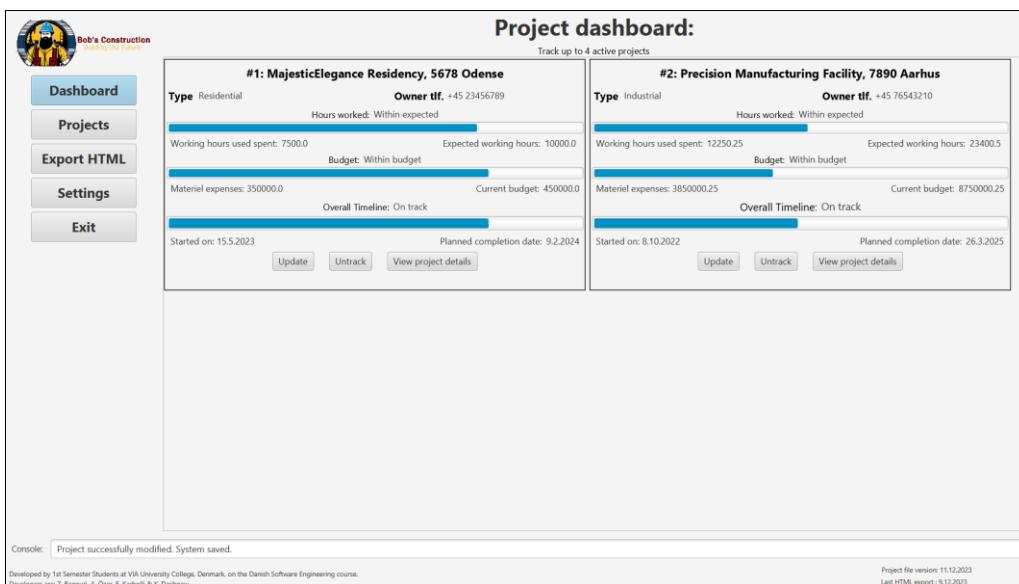


Figure 41: Project has been removed from the Dashboard.

## 9. Applying search filters to the project view

### **Purpose:**

This chapter explains how to apply filters in the project view to only show the projects you are interested in.

### **Pre-conditions:**

1. Project management system must be properly set up, and able to run on your system.
2. There must already exist construction projects in the system, to have anything to perform editing operations on.
3. Users must be in “Projects” section. (Look for manual 5.)

### **Steps to take:**

Below is a short summation of the steps required. Please navigate to the following pages for a detailed walk-through for each step.

1. Select “filter results.”
2. Make your filters.

## Step 1: Select “Filter Results”

To filter your projects, you must Press on “Filter Results.”

Figure 42: Press on Filter Results to filter your projects.

## Step 2: Make your filters.

After you **press** on “Filter Results” a new tab will appear with options to filter with.

Set filters X

## Filter Projects

Budget Range  Max. \$

Project Length  Min. months  Max. months

Owner Phone Number  tlf. (No prefix)

Hide finished projects?  Hide ongoing projects?

Hide residential Projects  Hide commercial Projects  Hide industrial Projects  Hide road Building Projects

Save Changes Reset Filters Cancel

Figure 43: Use the options to filter the Projects.

When Pressed “Save Changes” the overview will appear again with only the projects that meets the filters.

## 10. Exporting project files for use on the Company Homepage

### **Purpose:**

This chapter explains how to Export the project files to use them on the Homepage.

### **Pre-conditions:**

1. Project management system must be properly set up, and able to run on your system.
2. There must already exist construction projects in the system, to have anything to perform editing operations on.

### **Steps to take:**

Below is a short summation of the steps required. Please navigate to the following pages for a detailed walk-through for each step.

1. Select “Export to HTML”
2. Choose a folder.

## Step 1: Select “Export to HTML”

To export the files to the Homepage, you need to **press** on “Export to HTML”.

## Step 2: Choose a folder.

The system will now ask you to select a folder to save the project files in. **Choose** a folder to save the files.

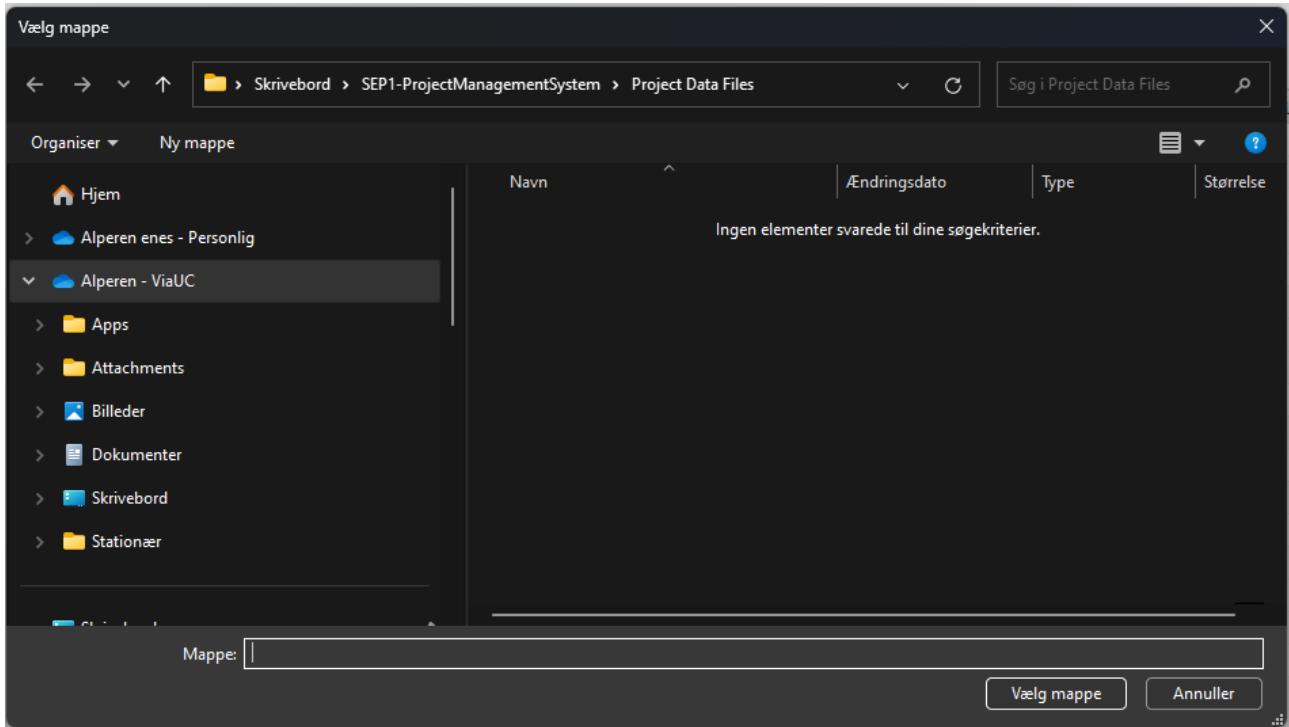


Figure 44: The system asks for a folder to save the files. Select a folder to finish the process.

Once the folder is picked the system will save the files that can be used on the homepage in the folder selected

## 11. Adding confidential/internal only managers notes to a project.

### **Purpose:**

This chapter explains how to set the project as confidential.

### **Pre-conditions:**

1. Project management system must be properly set up, and able to run on your system.
2. There must already exist construction projects in the system, to have anything to perform editing operations on.
3. The user must be in “Projects” Section.

### **Steps to take:**

Below is a short summation of the steps required. Please navigate to the following pages for a detailed walk-through for each step.

1. Select a project.
2. Select “Edit”.
3. Set the project as Confidential.

## Step 1: Select a Project.

Select a project that you want to flag/unflag as Confidential.

## Step 1: Select “Edit”

Select edit to view the tab to change the project data.

## Step 3: Set the project as confidential.

There is an option in the edit tab, to mark the project as confidential. When activated it will be conditional. set the project as confidential.

**Edit project**

**Commonly Updated Data Fields:**

Materiel Expenses: <input type="text" value="0.0"/>	Man-Hours spent: <input type="text" value="0.0"/>
Total budget: <input type="text" value="450000.0"/>	Estimated Man Hours required: <input type="text" value="10000.0"/>

Mark project as completed       Mark project as confidential       Track on Dashboard

**Other Project Details:**

<b>Customer Information:</b>	<b>Project Information:</b>
Name: <input type="text" value="Anders Jensen"/>	Project Name: <input type="text" value="MajesticElegance Residency"/>
Phone Number: <input type="text" value="+45"/>	Project Description: <input type="text" value="Experience opulence with MajesticElegance Residency, a residential masterpiece offering grandeur in every detail, from luxurious kitchens to spa-like bathrooms."/>
Email: <input type="text" value="anders.jensen@example.com"/>	Project photo (if applicable): <input type="button" value="Select"/> No project picture selected. Using Default picture instead.
Company Name: <input type="text" value="EliteHomes Builders"/>	Project Address:
Street: <input type="text" value="Oak Street"/>	Street: <input type="text" value="Regal Avenue"/>
Apartment: <input type="text" value="6789"/>	Apartment #: <input type="text" value="3A"/>
City: <input type="text" value="4567"/>	City: <input type="text" value="Aalborg"/>
Country: <input type="text" value="Denmark"/>	Country: <input type="text" value="Odense"/>
Project Managers comments: <input type="text" value="N/A"/>	Update project dates: <input type="text" value="15.5.2023"/> <input type="text" value="9.2.2024"/>

**Residential Specific Data:**

Number of Bathrooms: <input type="text" value="4"/>	Project Duration: <input type="text" value="9"/>
Number of Kitchens: <input type="text" value="3"/>	Building Size: <input type="text" value="350.0"/> m <sup>2</sup>
Number of other rooms with Plumbing: <input type="text" value="2"/>	<input checked="" type="checkbox"/> Is project a renovation?

User. Nothing was exported.

City College, Denmark, on the Danish Software Engineering course.  
Dashnaw

Project file version: 8.12.2023  
Last HTML export: 8.12.2023

Figure 45: use the edit project tab to mark the project as confidential.

## 12. Changing the default project settings

### **Purpose:**

This chapter explains how to change the default project specific information that is pre-loaded into newly created projects. It provides you with an increased flexibility regarding reducing your workload through unnecessary repetitive actions.

### **Pre-conditions:**

1. Project management system must be properly set up, and able to run on your system.

### **Steps to take:**

Below is a short summation of the steps required. Please navigate to the following pages for a detailed walk-through for each step.

1. Click on the Settings button.
2. Change any of the displayed settings.
3. Save the changes.

## Step 1: Click on the Settings button.

First you must click on the “Settings” button to be directed to the settings page.

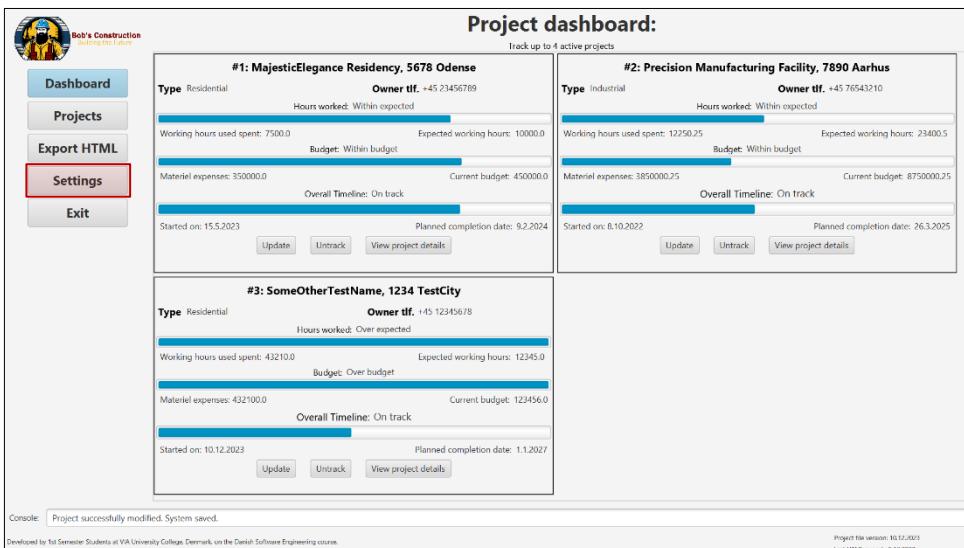


Figure 46: Click the settings button highlighted in red.

## Step 2: Change any of the displayed settings.

You can now change any of the displayed settings, by replacing the displayed values with your own.

**Note:** The system will not allow illegal entries here. If an entered value is not a proper value (example: entering text into a field that requires a number) you will receive an error from the system, and saving will be disabled until corrected. Review the chapters on creating and editing projects to learn more about this, if needed.

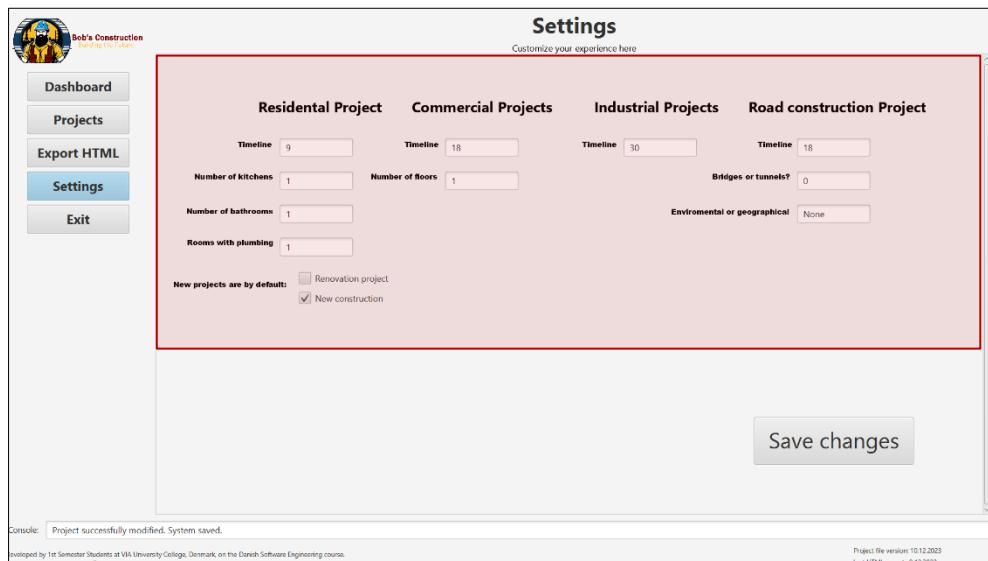


Figure 47: Change the data in the highlighted area as needed.

### Step 3: Save the changes.

Save the changes by clicking the “Save Changes” button. If the button is greyed out, please read the note from step no. 2.

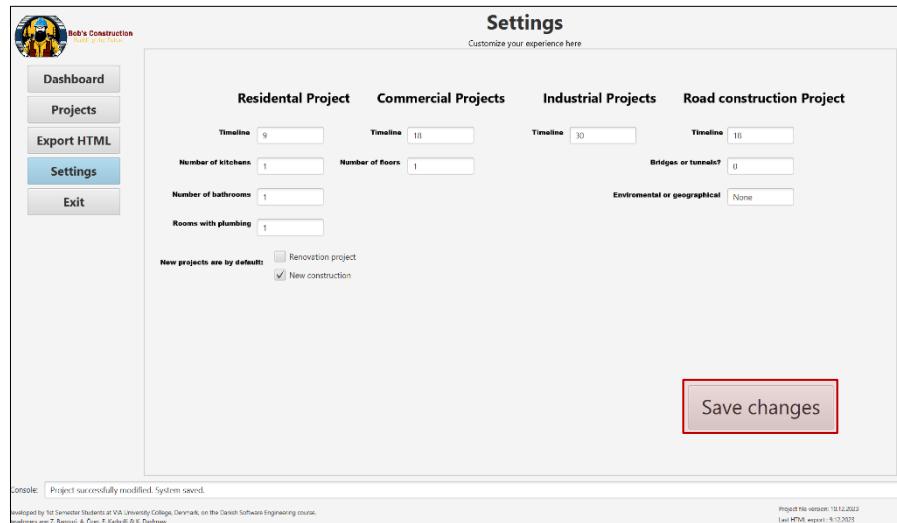


Figure 48: Save the changes by clicking the red highlighted button.

After saving the changes you will be redirected back to the main Dashboard view and the console will notify you that the changes were saved.

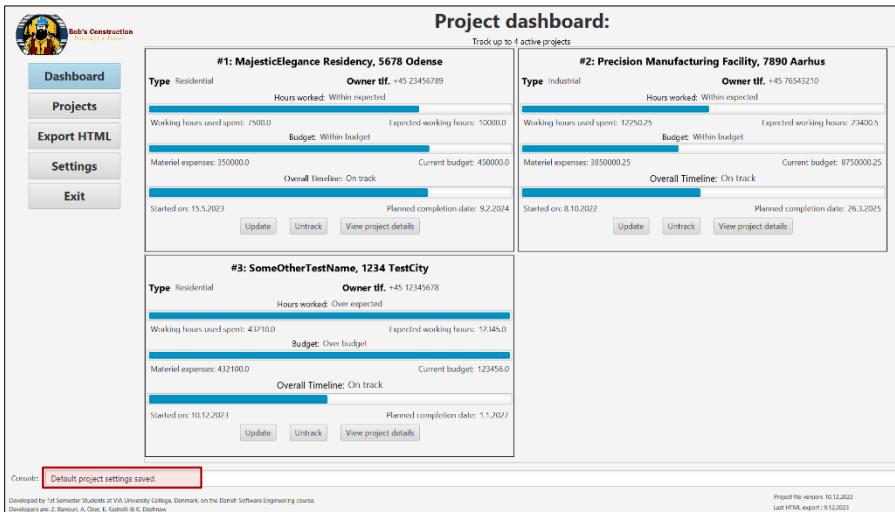


Figure 49: Confirmation shown of successful settings save is highlighted in red.

## 13. Preventing specific projects from being exported (Confidentiality setting).

### **Purpose:**

This chapter explains how to flag projects as confidential to prevent information from these projects from being exported to any html compatible files. This enables you to have full control over what projects to display on the company homepage, and which projects to keep in the internal project management system.

### **Pre-conditions:**

1. Project management system must be properly set up, and able to run on your system.

### **Steps to take:**

Below is a short summation of the steps required. Please navigate to the following pages for a detailed walk-through for each step.

1. Click on the Settings button.
2. Change any of the displayed settings.
3. Save the changes.

## Step 1: Either create a new project, edit an existing project, or update a dashboard project.

Flagging a project as confidential can be done during the creation, editing, or updating phase for each project. Please follow the appropriate steps laid out in the other chapters to navigate to one of the following views:

The screenshot shows the 'Project dashboard' interface. It displays two projects: #1 MajesticElegance Residency (Residential, Owner tlf. +45 23456789) and #2 Precision Manufacturing Facility (Industrial, Owner tlf. +45 76543210). A 'Quick update' modal is open over the dashboard. The modal contains fields for 'Material expenses' (422100.0), 'Budget' (122500.0), 'Man Hours spent' (42210.0), 'Estimated Man Hours required' (12345.0), and checkboxes for 'Mark project as completed', 'Mark project as confidential', and 'Track on Dashboard'. Buttons for 'Save Changes' and 'Cancel' are at the bottom. Below the modal, a preview of the project details is shown, including 'Hours worked: Over expected', 'Budget: Over budget', and 'Overall Timeline: On track'.

Figure 50: From the "Update" button on the Dashboard

The screenshot shows the 'Edit project' view for a residential project. The project details include: Name (TestName2), Phone Number (+45 12345678), Email (test@email.com), Street (TestStreet), Apartment (123), City (TestCity), Country (TestCountry), and Project Manager comments (Some comment). Customer information includes: Name (TestName2), Phone Number (+45 12345678), Email (test@email.com), Company Name (Company Name the customer is representing), Street (TestStreet), Apartment (123), City (TestCity), and Country (TestCountry). Residential Specific Data includes: Number of Bathrooms (1), Number of Kitchens (1), and Number of other rooms with Plumbing (1). Project Address includes: Street (TestStreet), Apartment (123), City (TestCity), and Country (TestCountry). Project Duration (17), Building Size (12345.0 m²), and a checkbox for 'Is project a renovation?' are also present. Buttons for 'Save Changes' and 'Cancel' are at the bottom. A note in the console says 'Console: | Cancel confirmed. No changes were saved.'

Figure 51: From the "Edit project" view.

Figure 52: During project creation.

## Step 2: Tick (or untick) the “Mark as confidential” box.

Tick the “Mark as confidential” box to flag the project as confidential or untick it to flag it as non-confidential.

Figure 53: Checkbox on “update” from the Dashboard view highlighted in red.

**Edit project**

Commonly Updated Data Fields:

Material Expenses: 123100.0	Man Hours spent: 123200
Total Budget: 123456.0	Calculated Man Hours required: 12345.0
<input type="checkbox"/> Mark project as completed	
<input checked="" type="checkbox"/> Mark project as confidential	
<input checked="" type="checkbox"/> Track on Dashboard	

**Other Project Details:**

Customer Information:		Project Information:	
Name: TestName2	Phone Number: +43 12345678	Project Name: TestName2	Project Description: This test project has now been modified.
Email: test@email.com	Company Name: Company Name the customer is representing	Project photo (if applicable):	Select No project picture selected. Using Default picture instead.
Street: TestStreet	Apartment: Customer apartment number, if applicable	Street: TestStreet	Apartment #: Apartment number, if applicable. (Leave empty)
City: 1234	City: TestCity	City: 1234	City: TestCity
Country: TestCountry	Country: TestCountry	Country: TestCountry	Country: TestCountry
Project Managers comments: Some comment		Update project dates: 10.12.2023 -> 1.1.2024	
Residential Specific Data:		Project Duration: 17	
Number of Bathrooms: 1		Building Size: 12345.0 m <sup>2</sup>	
Number of Kitchens: 1		<input type="checkbox"/> Is project a renovation?	
Number of other rooms with Plumbing: 1			

**Save Changes** **Cancel**

Console: Cancel confirmed. No changes were saved.

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Project Revision: 10.12.2023  
Last Edit: 09.12.2023

Figure 21: Checkbox highlighted in red, from the edit project view.

**Create a new project**

**Enter Project Details:**

Customer Information:		Project Information:	
Name: TestName	Phone Number: Prefix (+43) Number (8 digits)	Project Name: Project name. Will be displayed on homepage.	Project Description: Enter a short project description. This information is displayed on the company homepage.
Email: email	Company Name: Company Name the customer is representing	Project photo (if applicable):	Select No project picture selected. Using Default picture instead.
Street: Customers Street Name	Apartment: Building number	Project Duration: Start date: Est. Completion Date:	Project Duration: Start date: Est. Completion Date:
Apartment: Customer apartment number, if applicable	City: ZIP code: City	Project Managers comments: Enter any internal notes directed towards the project manager.	Project Managers comments: Enter any internal notes directed towards the project manager.
Country: Country	Street: Street name Property number	Budget: In EUR	<input checked="" type="checkbox"/> Is project confidential?
Apartment #: Apartment number, if applicable. (Leave empty)	Number of Bathrooms: 1	In Hours	<input type="checkbox"/> Add project to Dashboard?
	Number of Kitchens: 1	City: Project ZIP code Project City	
	Number of other rooms with Plumbing: 1	Country: Project Country	

**Residential Specific Data:**

Number of Bathrooms: 1	Project Duration: 9
Number of Kitchens: 1	Building Size: 0.0 m <sup>2</sup>
Number of other rooms with Plumbing: 1	<input type="checkbox"/> Is project a renovation?

**Create Project** **Cancel**

Console: Cancel confirmed. No changes were saved.

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Figure 55: Checkbox highlighted in red, from the create project view. Note the name is slightly different here.

### Step 3: Save the changes.

Click the appropriate “Save changes”, or “Create project” buttons to finalize flagging the project as confidential (if you ticked the checkbox) or non-confidential (if you did not tick the checkbox).

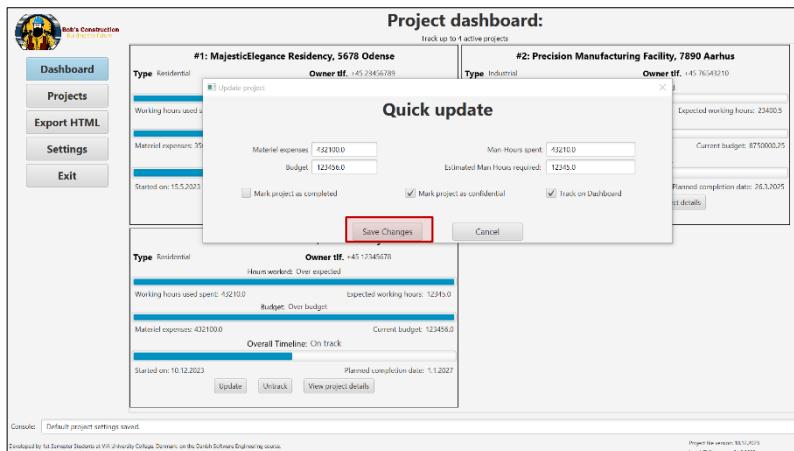


Figure 56: Save button on “update” from the Dashboard view highlighted in red.

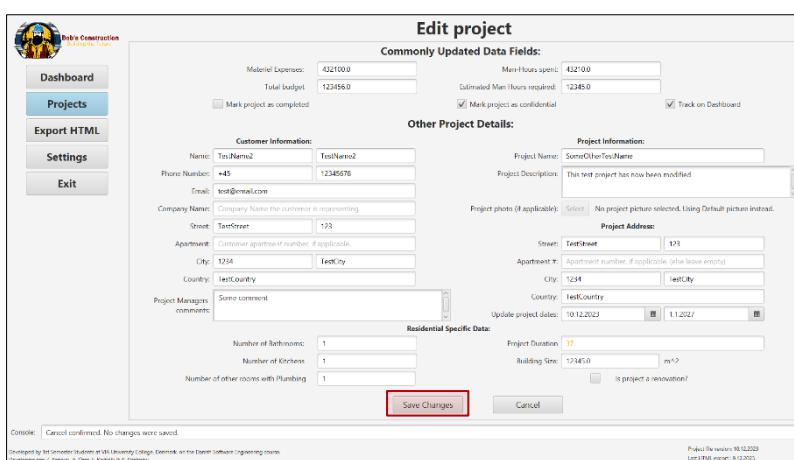


Figure 57: Save button highlighted in red, from the edit project view.

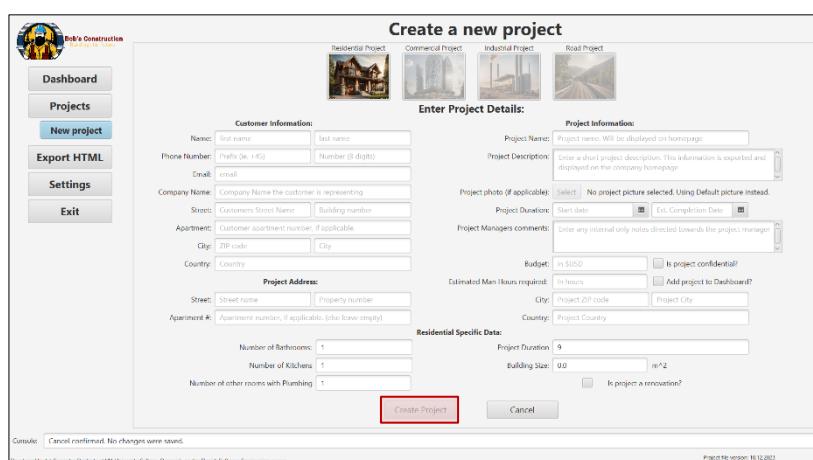


Figure 58: Save button highlighted in red, from the create project view.