2020

Timely User Manual

COMPLETED ON APRIL 8, 2020

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Table of Contents

Conventions

Typed Text	“This is typed text”, “git pull”
Commands and Keyboard Sequences	**Return/Enter, CTRL+V**
Menu Selection Sequences	[Start] > [Documents] > [Project]
File directory	[Documents], [Desktop], [New Folder]
Buttons	(Login), (Done)

Installation Instructions

To get you up and running, the following instruction set will help guide you in the installation of the Timely application. These instructions are intended for Windows computers. These instructions assume that you have downloaded Eclipse on your system, it also assumes that you have a working knowledge of Eclipse and command line. This will take roughly 10 minutes to complete. Please ensure that you have the required materials before beginning the installation process.

Required Materials

- Timely zip file, which contains:
    - timely_client folder
    - timely_server folder
    - snippits.txt
- MySQL connector

Client Installation

These steps will ensure that the Timely Client, the frontend portion of the app, is installed and running on your local machine. After installation, nothing will be served to the Client until the Server is installed and running.

1. Unzip Timely zip file
2. Open the [timely_client] folder in a command line terminal
3. Type "npm install" in the root folder, a short installation sequence should occur.
4. Navigate to [client] sub-directory folder
5. Type "npm install", a longer installation sequence will begin
6. Type "npm start" in the [client] sub-directory, this will start the development server

Congratulations, you have successfully installed and run the Timely React Client. Please note that nothing will be served on this client until the Server is installed and running. Please proceed with the server installation process.

Server Installation

The Server installation steps are more numerous and more complicated than the Client installation steps. There are 3 components to the Server installation: Setting up the datasource, bypassing CORS, and the installation to your local machine.

We will start with the datasource:

1. Navigate to the [timely_server] folder
2. Locate the timely.sql file in the root directory of the zip
3. Execute the file in your local MySQL database

   We have successfully created the MySQL database that the backend will use to manage data. The next step will be to connect our wildfly server to this database table.

4. Startup your Wildfly server in Eclipse
5. Navigate to localhost:8080

6. Login to the administration console, using your credentials
7. Navigate to [Configuration] -> [Subsystems] -> [Datasources and Drivers] -> [Datasources]
8. Click the (+) icon to add a new datasource
9. Select MySQL from the list of databases
10. Click (Next)
11. Under the Name field, type “Timely”
12. Under the JNDI Name, type “java:jboss/datasources/MySQLDS”
13. Click (Next)
14. Under Driver Name, locate and click on your MySQL connector version
15. Leave the Driver Module Name field untouched
16. Under Driver Class Name, type “com.mysql.cj.jdbc.Driver”
17. Click (Next)
18. Under the Connection URL, enter “jdbc:mysql://localhost:3306/MySQLDS?serverTimezone=America/Vancouver”
19. Under the Username and Password fields, enter your MySQL username and password
20. Click (Next)
21. Click (Test Connection)

If everything is setup correctly, your connection should be successful. Congratulations, we have successfully created the datasource that we will be using to send and obtain our data.

Bypassing CORS

The next step is to bypass CORS. This is to ensure that we do not get any CORS errors when we are communicating with the server on our client.

1. Locate the directory where your Wildfly server is installed
2. Open an explorer window or command line terminal where your Wildfly server is located, typically under the [C:/Java] directory
3. Navigate to the [standalone] folder
4. From the [standalone] directory, navigate to the [configuration] folder

At this point, you should see standalone.xml inside of the configuration folder.

5. Open standalone.xml with any text editor, preferably Eclipse or Notepad++
6. Using the text editor’s search function, search for the following string “<subsystem xmlns="urn:jboss:domain:undertow:9.0"”

You will find a large <subsystem> tag, we will edit this tag in a moment.

7. Open the snippits.txt file, in another text editor window
8. Observe the <subsystem> tag inside of snippits.txt
9. Copy and replace the <subsystem> tag within standalone.txt with the new code from snippits.txt.
10. Close snippits.txt
11. Save and close standalone.txt

You have successfully configured your Wildfly server to bypass CORS.

Installing to your local machine

Now that we have created our datasource and bypassed CORS, we can now complete the final steps to get the Timely Server up and running.

1. Ensure your Wildfly server is running
2. Open the [timely_server] folder in the command line
3. Type “mvn clean install”
4. To deploy, type “mvn wildfly:deploy”
5. After a short moment, the backend server will be active.

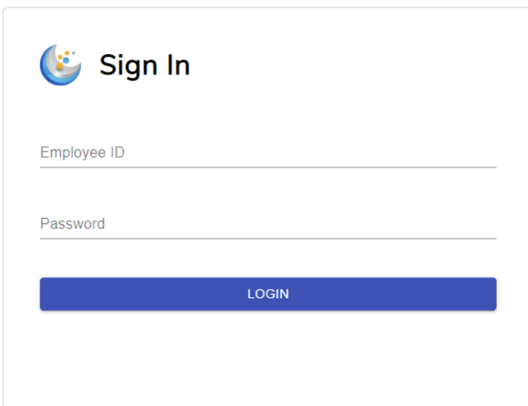
Congratulations! You have completed the installation of the Timely Project Management application. The Timely Client will be able to fetch and send data to and from the server, running locally on your machine.

Instruction Sets

The following instruction sets will be broken down into their respective sub-menu. Each user major user action resides within a certain sub-menu, with the only major exception being the Login page. Each sub-menu, known from this point on as a 'Portal', divides the major features from each other. The following set of instructions will be organized by portal.

Note: The role of the individual employee plays a large part in what they can do while in a portal, and changes if they can even see the portal in the first place.

Login/Logout



Logging In

Employees who wish to access the system will first need to login, using their Employee ID and HR assigned Employee Password. All employees must login before they can access the system. Along with the regular Employee accounts, admin accounts have been created with the system.

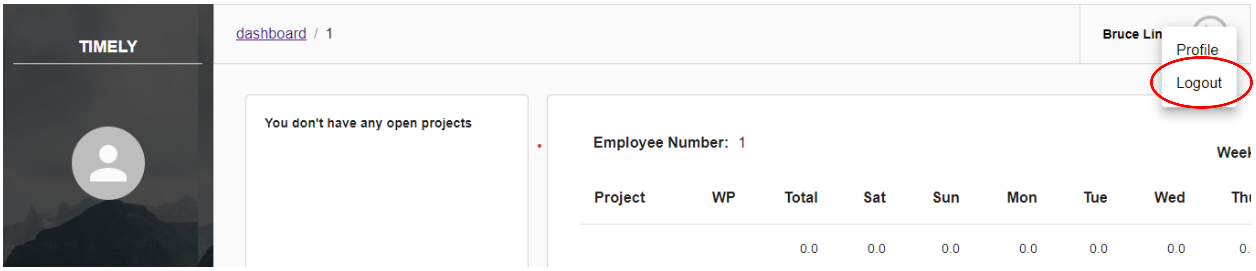
1. Navigate to the Timely homepage
2. Enter your Employee ID in the first text field
3. Enter your Employee Password in the second text field.
4. Click (Login)

After a successful login, you should see the Timely Dashboard for that user.

Logging Out

At the end of the day, Employees are encouraged to logout of the system, for security purposes.

1. From the Dashboard, locate the employee profile icon on the top right of the page



2. Click on the icon to display a dropdown list of options
3. Find and click on (Logout)

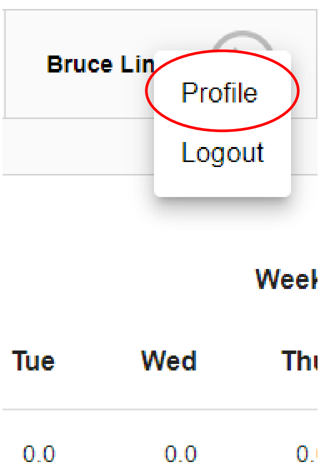
After a successful login, you should see the Timely Dashboard for that user.

Employee Profile

Viewing Your Profile

When an employee is logged in, they can view various Employee related information, such as their Name, Labor Grade and Supervisor.

1. From the Dashboard, click on the Employee Profile image on the top right
2. A list of menu items will appear, select [Profile]



3. You will be directed to the Employee Profile page

On the Employee profile page, you will be able to view various information, however you cannot change it. To change any information, please contact an HR Staff member.

Change Password

Employees can change their password and are encouraged to do so every 6 months or so.

1. From the Employee Profile page, you should see the Change Password section towards on the right side, or on the bottom for smaller screens
2. In the Old Password field, enter your current password
3. In the New Password field, enter a new password of 6 or more characters. Eg: "TimelyRocks!"
4. Retype your new password in the Confirm New Password text field

5. Click (Submit) to save your changes.

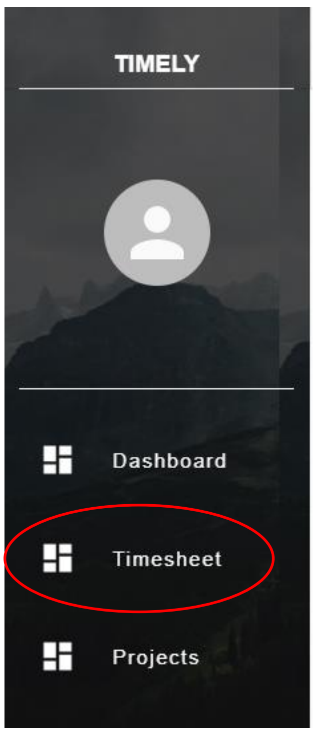
Congratulations, you have successfully changed your password! In the case that you have forgotten your password and are unable to login please ask an HR Staff member or the Admin to reset your password.

Timesheet

View Timesheet(s)

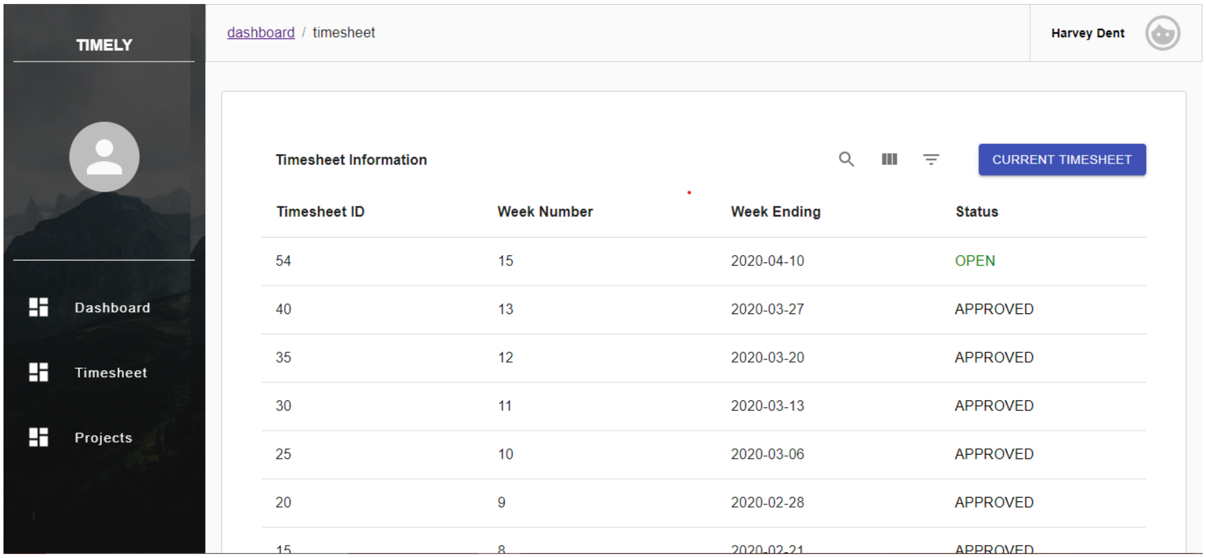
Timesheets contain the work hours that you have posted on all your Work Packages. Each timesheet contains the data for one week, from Saturday to Friday, and it calculates the amount of Overtime worked as well as available Flextime hours.

1. From the Dashboard, click on [Timesheet] from the left side nav-bar



You will land on the Timesheet page; this page will show you your current and previous timesheets. Each timesheet will have a unique ID, its corresponding week number, the date it ends, and its current status.

2. If there is no current timesheet, click on the (Current Timesheet) button on the top right of the page. This will create an empty timesheet for the current week



3. Click on any one of the Timesheet entries to view its details.

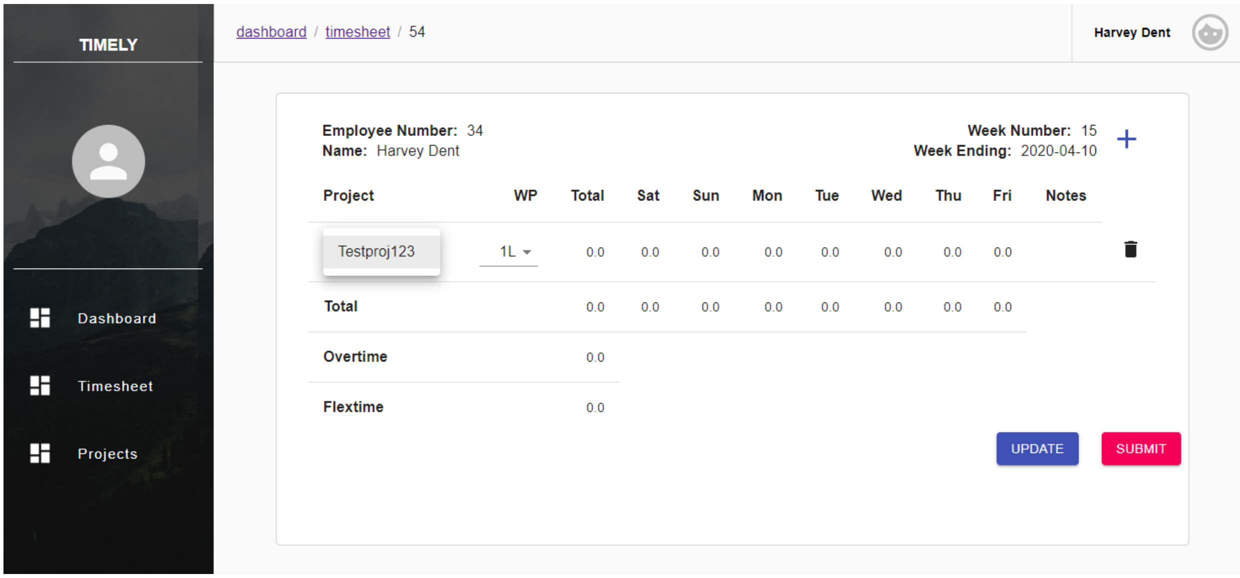
Once you're on the Timesheet Detail page, you can get an in depth look at each day of the week and how your hours are split between work packages.

Add Hours to Timesheet

As mentioned in the instructions above, each timesheet consists of the hours that you have worked on a certain work package. The following instructions will help guide you when you are ready to commit the hours that you have worked on a certain work package to your Timesheet. The following instruction set assumes that you are assigned to a work package with an OPEN status.

1. From the Timesheet page, search for a timesheet with the OPEN status, this is your current timesheet.
    a. If you do not have a current timesheet, click the (Current Timesheet) button to create a new timesheet
2. Click on the timesheet with the OPEN status

You should see an empty, or partially filled, timesheet with 1 or more rows within it. We will now fill this out with some hours.



3. Create a new row by clicking the (+) icon on the top right.
4. In the Project column, you will see all the projects that you are assigned to. Select the project that contains your desired work package from the drop-down list
5. In the WP column, select the ID of the work package that you want to commit hours towards
6. The default hours for each day is 0.0, double click on the hours for the day you wish to add and enter a digit between 1 to 9. For example, we will double click on the hours for Monday and enter “5” for our hours.
7. Once you are complete, click (Update) to save your changes or (Submit) to submit your timesheet to your timesheet approver.

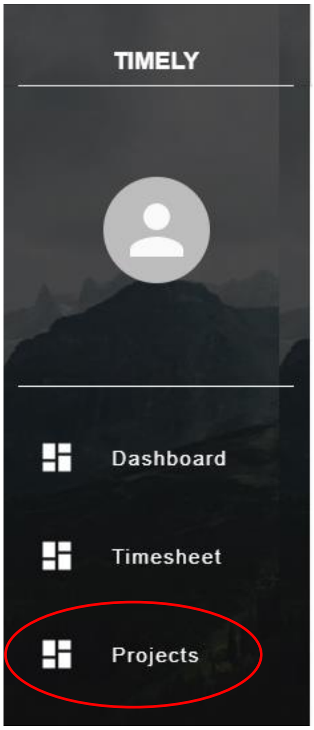
Congratulations, you have successfully added hours to your timesheet! It is recommended that you do this at the end of each day to ensure an accurate report of work hours.

Projects

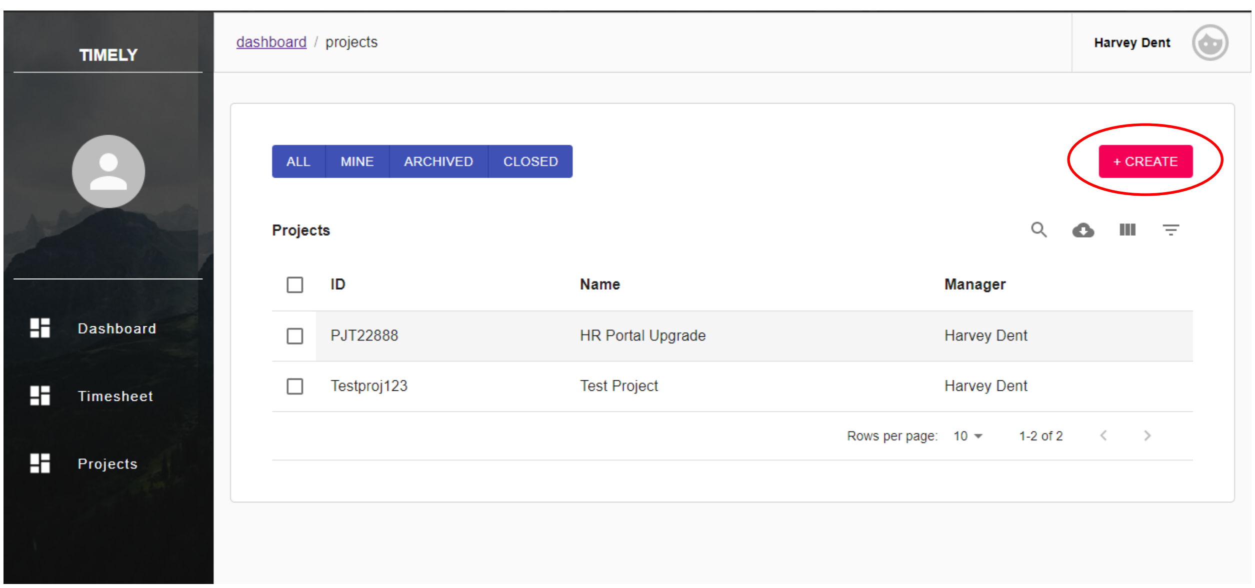
View/Create a project

Creating a project is a good way to organize a large chunk of work across multiple work packages and multiple people. In this instruction set, we will create and view our newly created project.

1. From the Dashboard, click on [Projects] from the left side nav-bar



You will land on the Projects page, this page will show you any projects that you or anyone else has created, as well as any Closed or Archived projects. Clicking on a project will bring you to its Project Detail page.

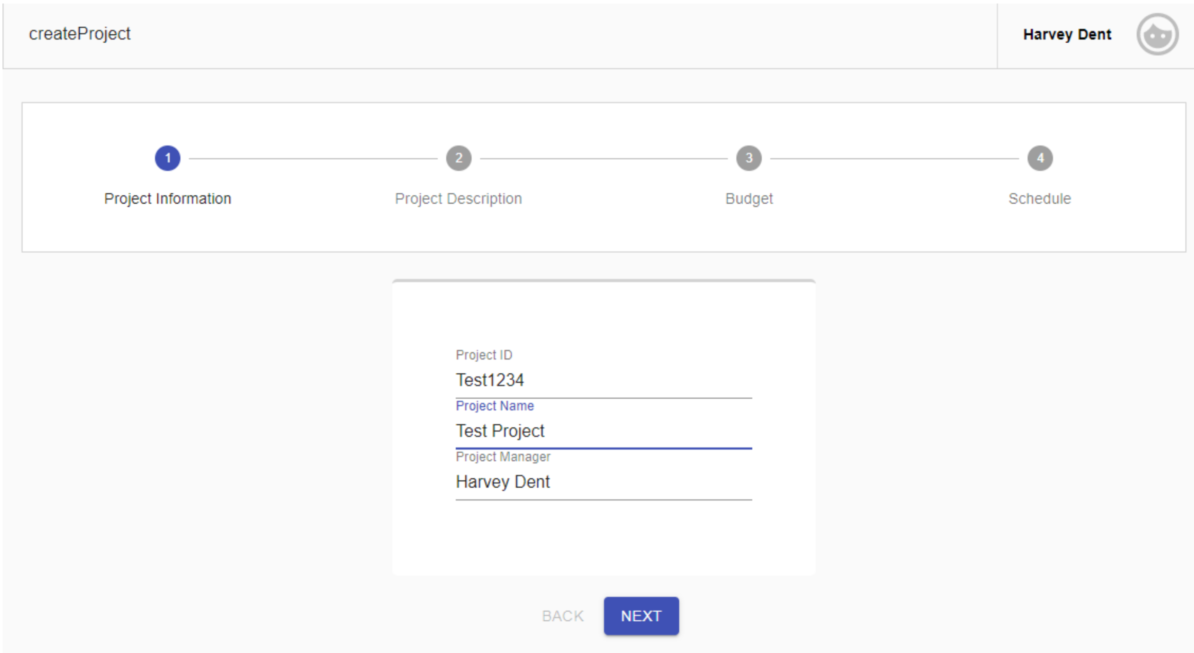


2. Click on the (Create) button on the top right of the page.
3. On the Project Information form, enter your Project ID

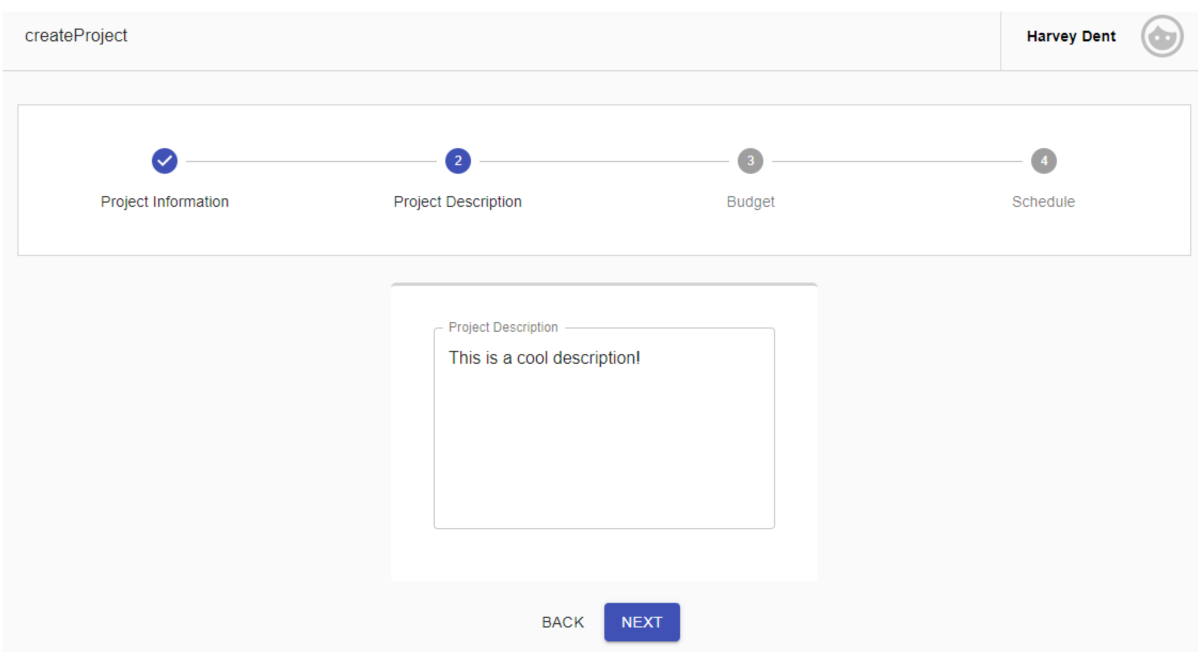
NOTE: The project ID must be unique, it will be rejected if a duplicate Project ID is found. Consider an organization-wide convention on Project ID's to prevent this.

4. Enter a detailed name for your project on the Project Name text field

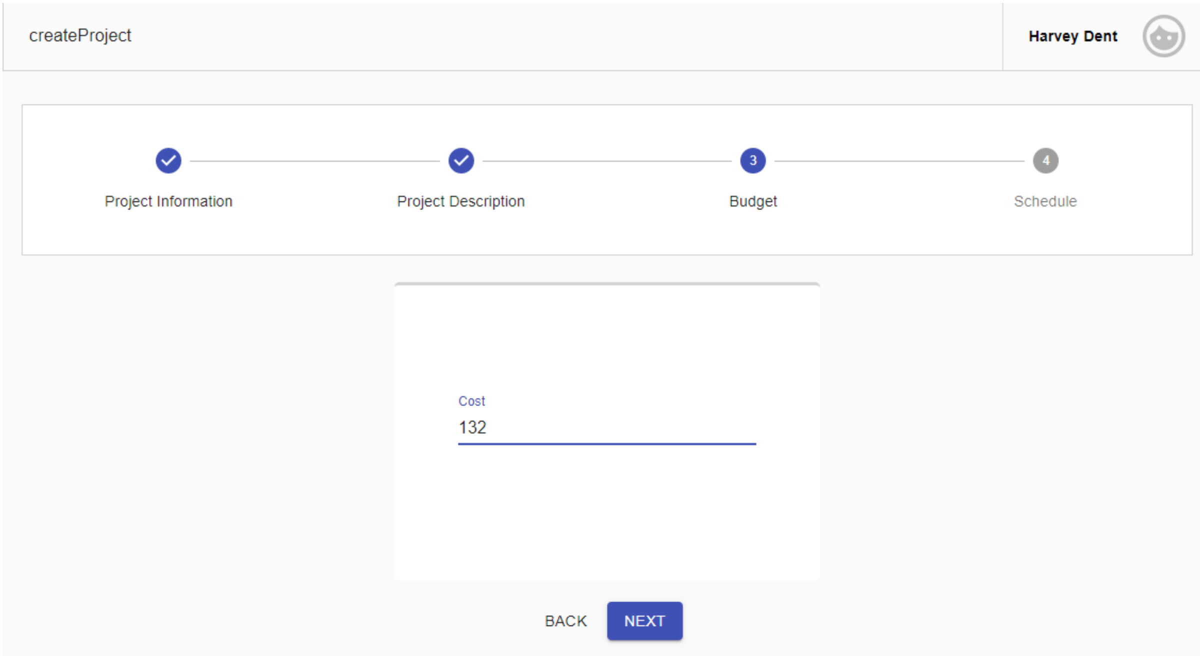
5. The Project Manager field cannot be changed. Employees who create a Project are automatically made the Project Manager of that project.



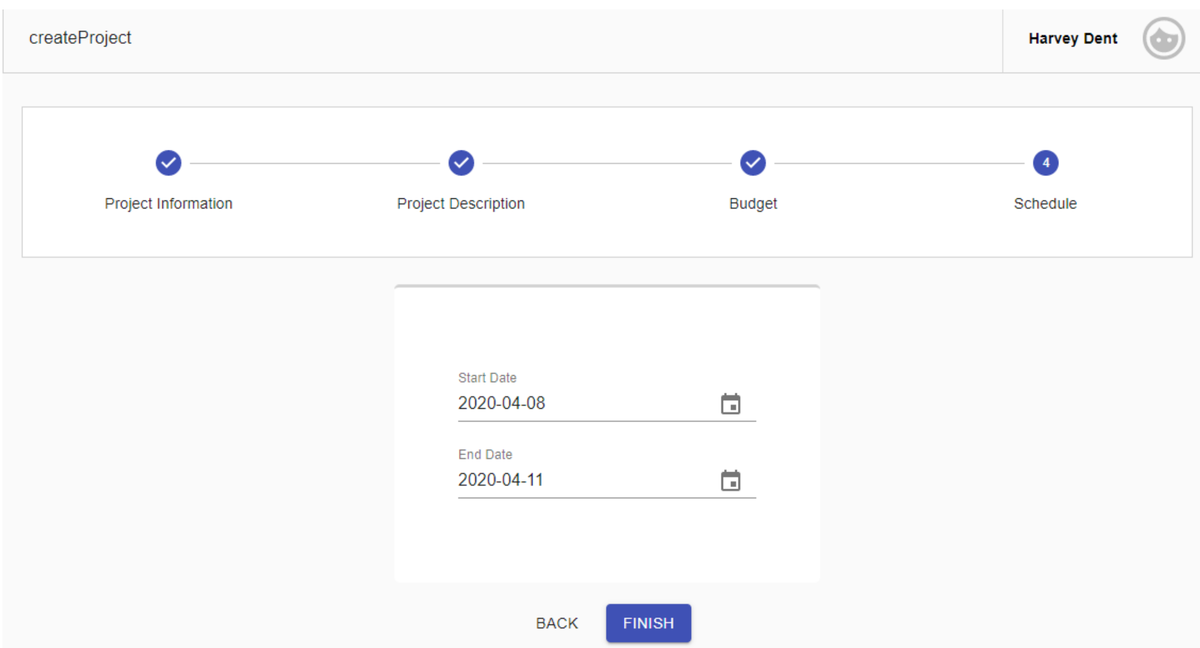
6. Click (Next)
7. Enter a concise Project Description in the text box



8. Click (Next)
9. Enter the estimated dollar amount cost for this project



10. Click (Next)
11. Enter the Start and End Date of the Project



12. Click (Finish)

Congratulations, you have successfully made a new Project.

13. Click on [Projects] from the left side nav-bar to return to the Projects page and view your created project.
14. Click on your newly created project from the project list.

From the Project Detail page, you can view all your previously entered information, create work packages, and download the Project Summary Report. This report contains information about all of the lowest level work packages with all of the employees working in those work packages and their hours.

Add Work Package

Projects are broken down into work packages. Each work package has its own unique ID, Name, and Responsible Engineer assigned to it. Work packages function like a tree, with a top-level (parent) work package, and child work packages branching down. One of these child work packages can be marked as the lowest level work package. The lowest level work packages are where the employees can commit their hours. The creation of work packages can only be done by the Project Manager.

1. From the Project Details page, click the (+ Create Work Package) button on the right.

   You will be directed to the Work Package Information form, where you can enter the details for that work package. Note that the Work Package ID will be auto-generated.

2. If this Work Package is the Lowest Level Work Package, click the checkbox
3. Enter an appropriate Work Package Name in the corresponding field
4. Click on the Responsible Engineer field to show a list of employees, select the required employee for your needs.
5. The Parent Work Package field will determine what parent Work Package this child will stem from. Click on the field to reveal a list of work packages, select the appropriate one.
6. Click (Next)
7. In the text box, enter a nice description for the work package
8. Click (Next)
9. Enter the estimated cost for the work package
10. Click (Next)
11. Enter the Start and End date of the work package
12. Click (Next)
13. Click the Select Employees field to reveal a drop-down list of employees. Each employee is listed with their full name and Labor Grade. Click on their name to add them to the work package.
14. Click (Finish)

Congratulations, you have created a work package within your project. Now, depending on its lowest level status, you can either create more child work packages or begin work on your newly created work package.

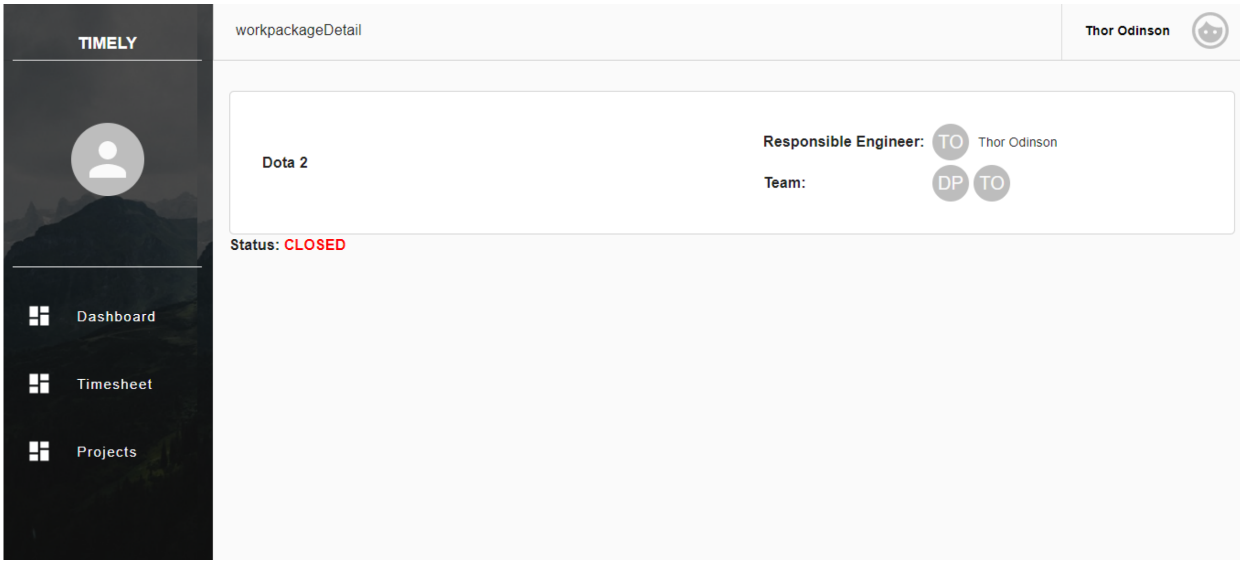
View Lowest Level Work Package

When a project is created and work packages are made within it, Employees working on the project and Project Manager can view the individual work packages themselves. Employees and Project Managers each have a different view of the work package, as the Project manager is concerned about the Budget vs Actual hours report of the work package while the Employee is concerned about the details of the work package. This instruction set will explain how to view them from both perspectives.

As an Employee

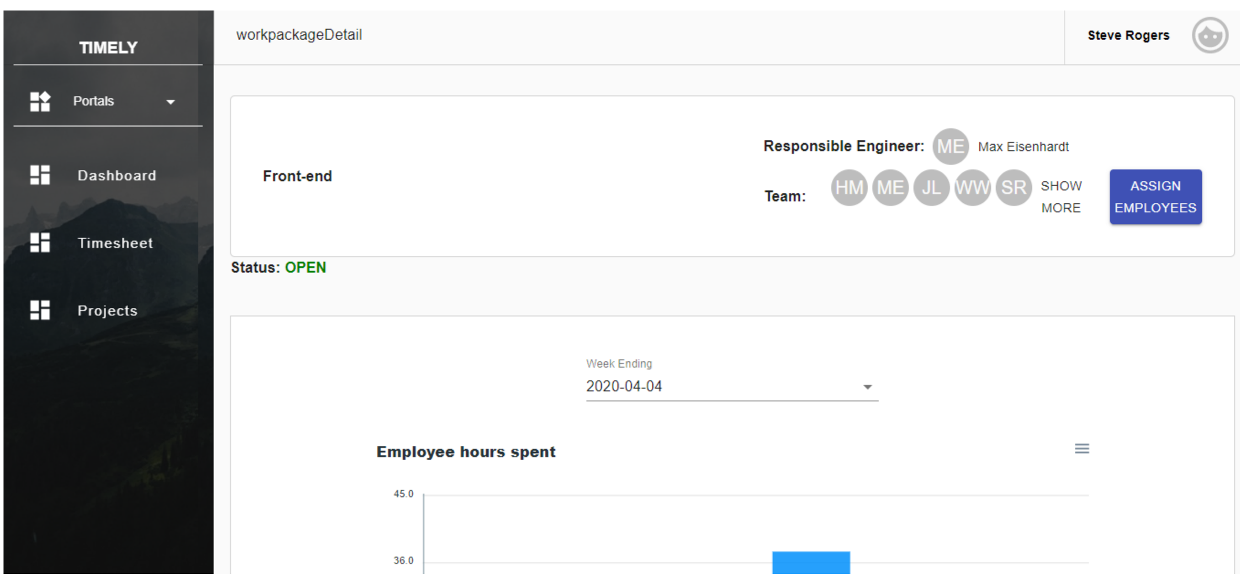
1. From the Dashboard, click on [Projects] from the left side nav-bar
2. Select the project that contains the Work Package you wish to view

3. You will be given a list of all of the work packages that you are assigned to for this project, click whichever work package you want to view
4. You will be directed to that Work Package's Detail page



As a Project Manager

1. From the Dashboard, click on [Projects] from the left side nav-bar
2. Select the project that contains the work package you wish to view
3. On the Project Detail page, you will see a drop-down tree of work packages, expand the tree and click on the lowest level work package that you wish to view
4. You will land on the Work Package Detail page.



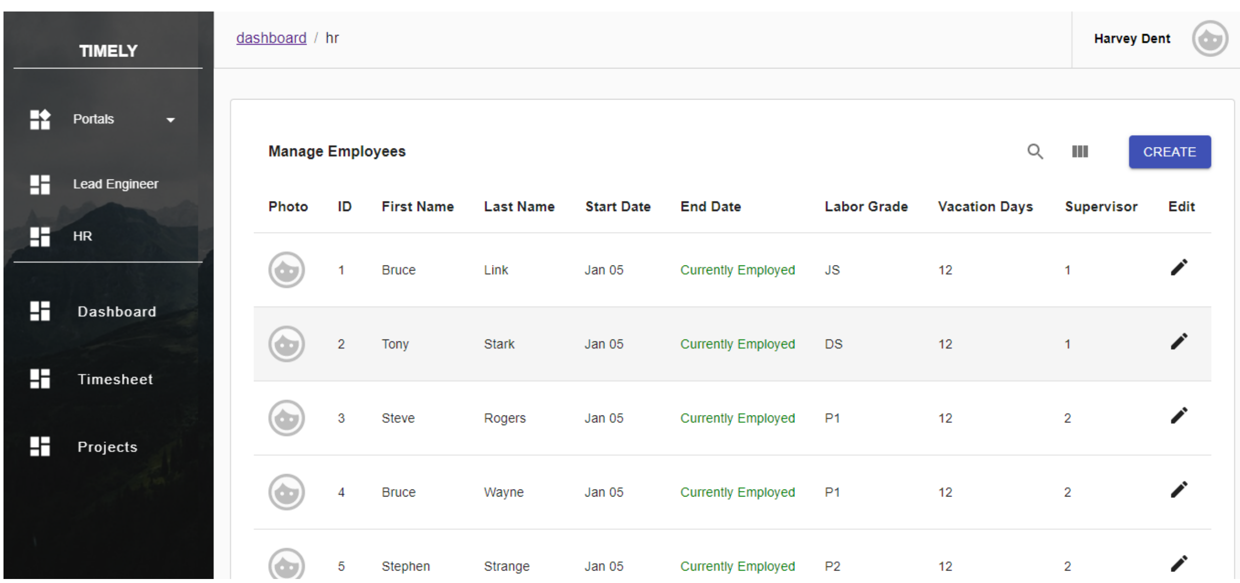
This detail page is similar to the Employee's version but with a couple more details. One thing, and arguably the most important, are the graphs on the page. These graphs are the Budget vs Actual hours report, they visualize the budgeted hours versus the actual hours spent on the work package, sorted by the week ending drop-down. You can also assign an employee directly to a work package on this page, by clicking the (Assign Employees) button on the top right.

Human Resources Portal

The Human Resources (HR) Portal is where all HR Staff can complete their HR related duties, such as creating new employees, editing existing employees, and assigning supervisors.

View Employees

1. From the Dashboard page, click on the drop-down arrow, next to your name, on the left nav-bar
2. Select [HR] from the menu items
3. You will be directed to the Manage Employees page

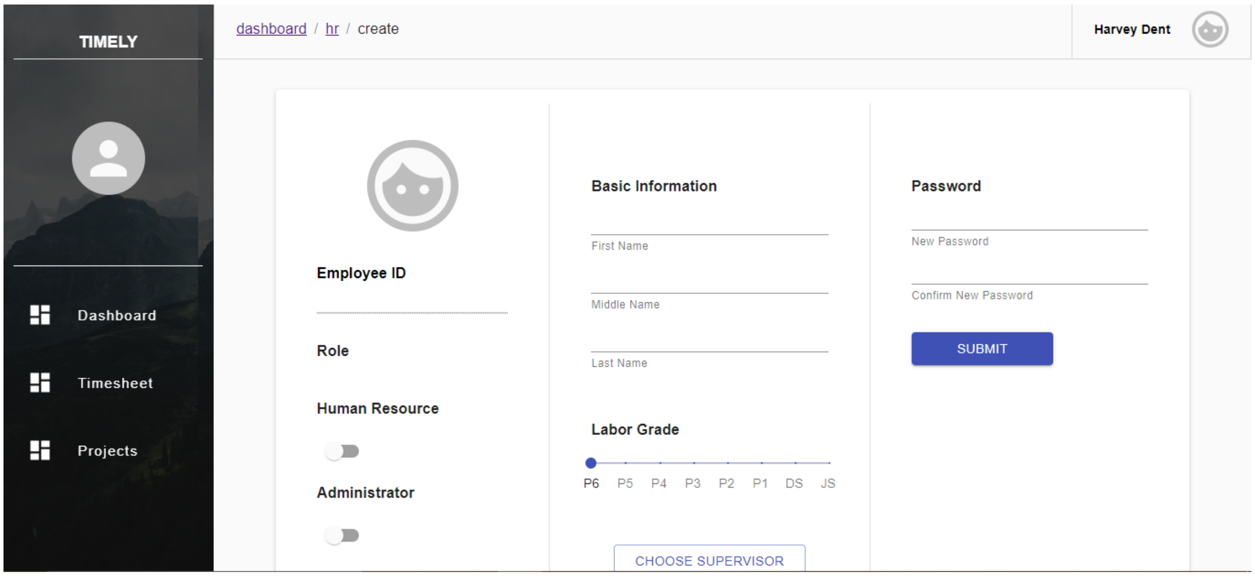


Here you can view all the employees that are in your organization. You can sort them by table column or search for a specific employee using the search function.

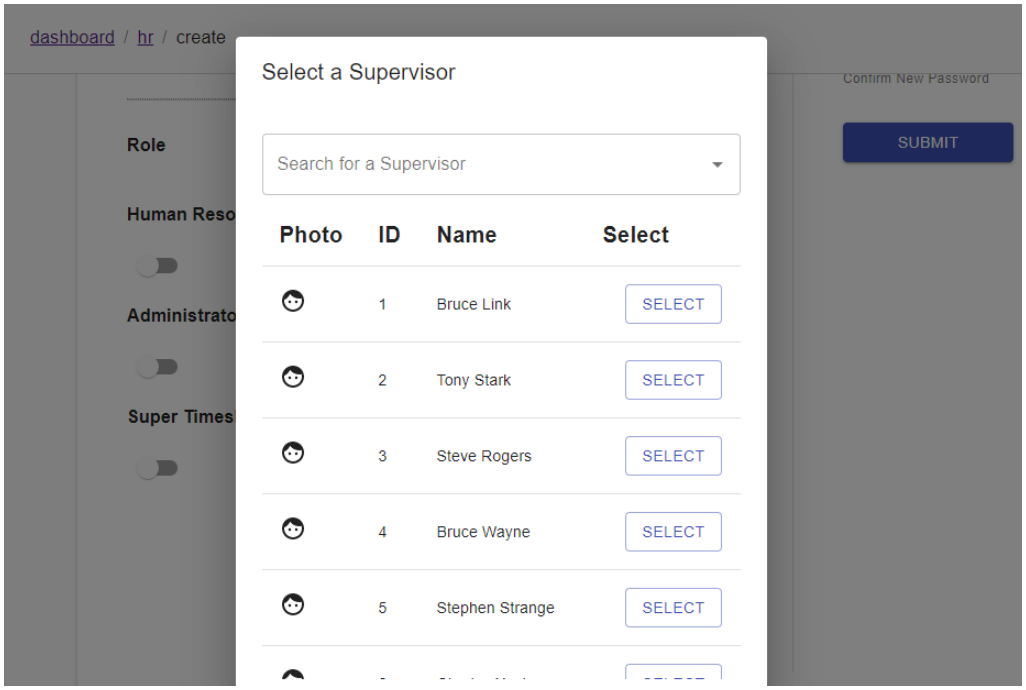
Create an Employee

When a new employee joins the organization, HR Staff is expected to create their account and enter the Employee's specific information, such as their Name, Labor Grade, Supervisor, etc. Employee ID

1. From the Manage Employees page, click the (Create) button from the Manage Employees page



2. On the creation page, you can enter all of the new Employee's information.
3. Enter the Employee's First Name, Middle Name, and Last Name in their respective fields
4. Select the Employee's Labor Grade using the slider
5. Click the (Choose Supervisor) button to select the Supervisor for this Employee

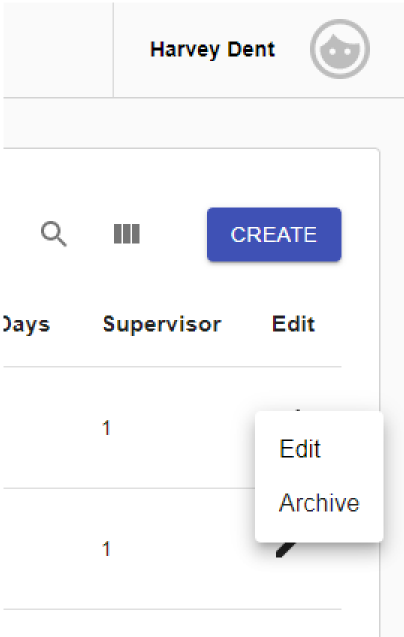


6. In the Vacation Days field, enter the number of Vacation Days this employee will have
7. On the left, you can toggle certain roles for the Employee, such as HR, Admin, and Super Timesheet Approver

Update Employee

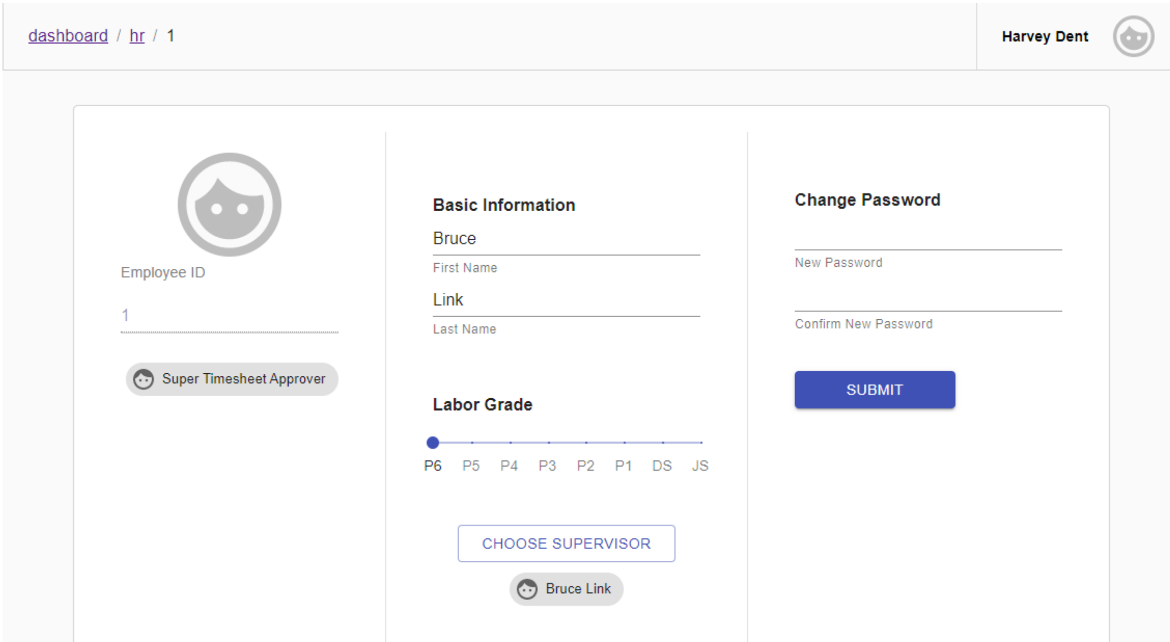
An employee may require their details to be changed as a result of a multitude of reasons, such as a change in labor grade, change in supervisor, marriage, and many other reasons.

1. From the Manage Employees page, click on the pencil icon on the Employee you want to edit
2. A menu will appear with two options: [Edit] or [Archive]. Select [Edit]



NOTE: Edit allows you to change the details of the employee. Archive, as the name suggests, archives the employee in the system. It does not delete them from the system and they can be always be unarchived.

3. On the Employee Detail page, you will have the option to edit the following fields:
   - First Name
   - Last Name
   - Labor Grade
   - Supervisor
   - Vacation Days
   - Password



4. Once you have made all your changes, click (Submit) to save your changes

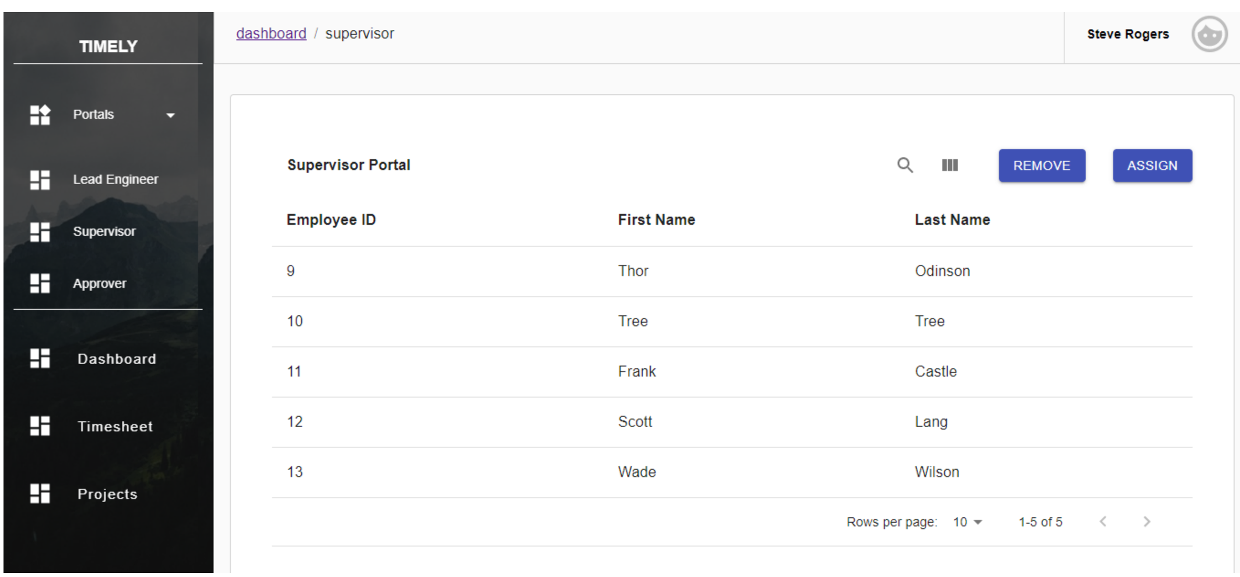
You have successfully updated an Employee.

Supervisor Portal

The Supervisor Portal is where all the Supervisors can view which employees are under their supervision and assign those employees to projects.

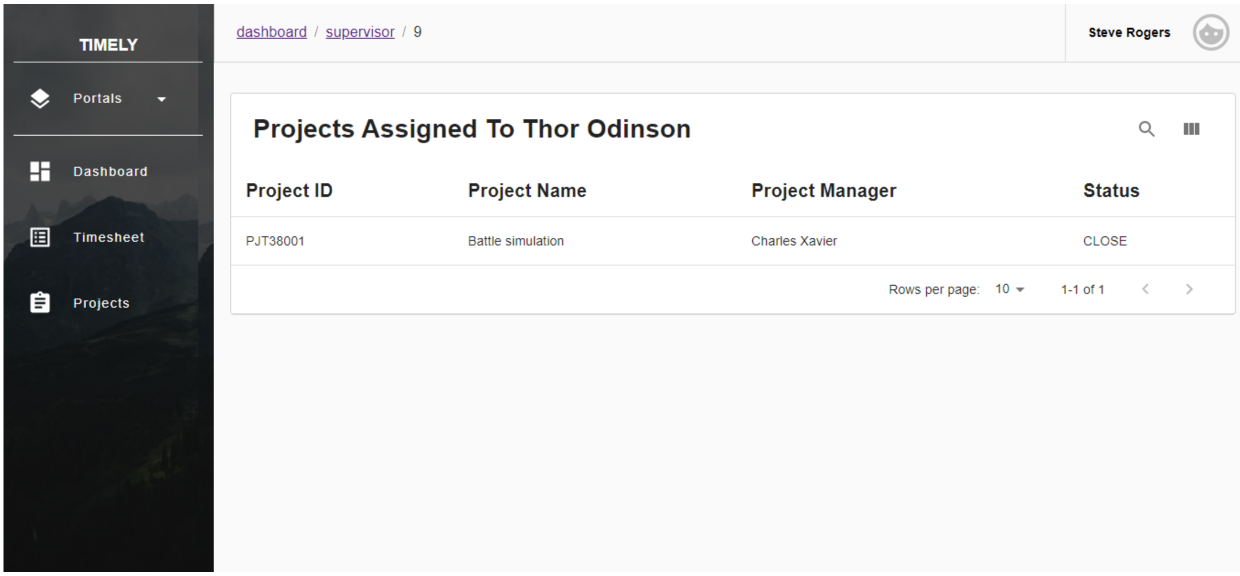
View Employees

1. From the Dashboard page, click on the drop-down arrow, next to your name, on the left nav-bar
2. Select [Supervisor] from the menu items
3. You will be directed to the Employees page



From here you can view all of the employees that are under your supervision.

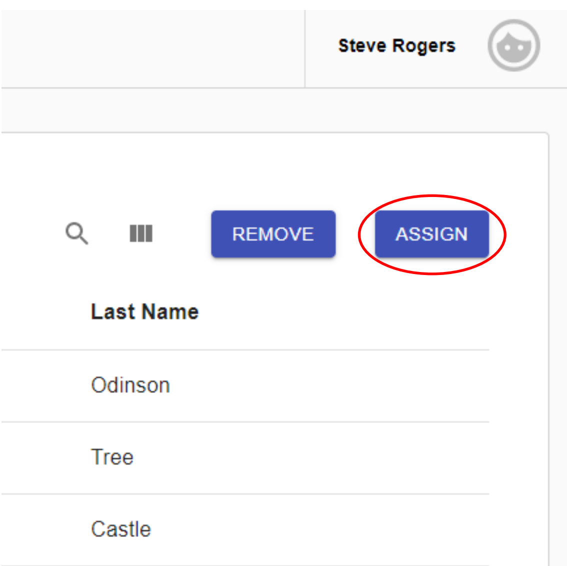
4. Click on an individual employee
5. You will be directed to a page that will detail what projects that employee is assigned to



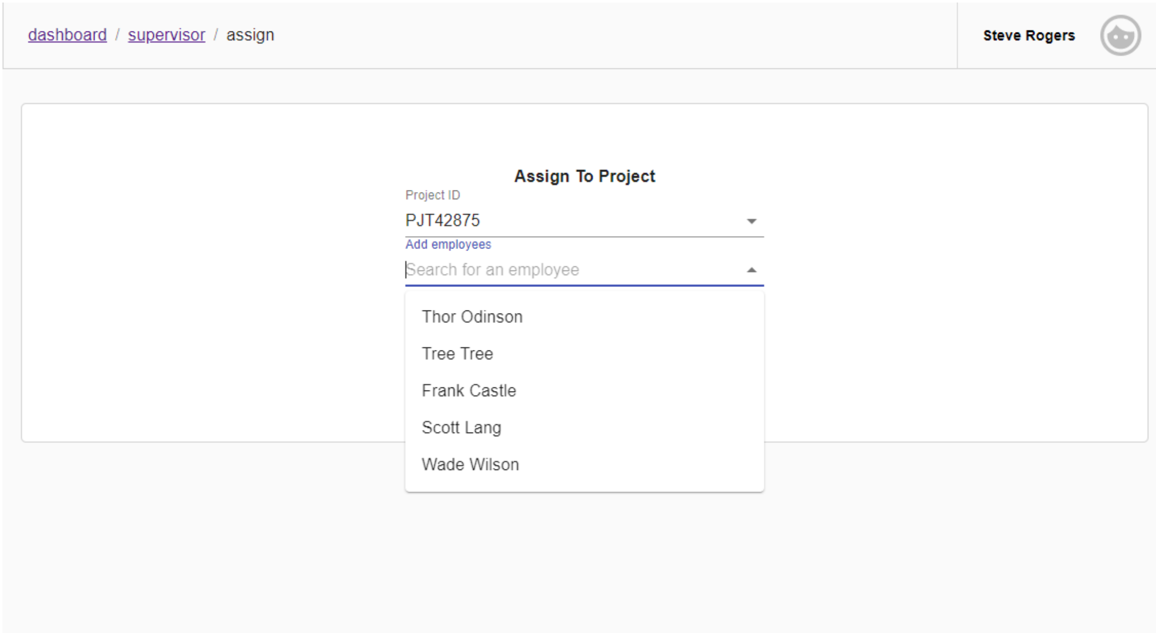
Assign Employee to Project

Once a project is made, it will be the duty of the Supervisor to assign their employees to the appropriate projects.

1. From the Employees page on the Supervisor portal, click the (Assign) button



2. On the Assign to Project form, click the Project ID drop-down to select the project you want the employee to be assigned



3. On the Add Employees drop-down, select the appropriate employee
4. To complete the process, click (Assign)

You have successfully assigned an employee to a project. Removing an employee follows a similar flow, but instead of clicking (Assign) on the Employees page, click (Remove) instead.

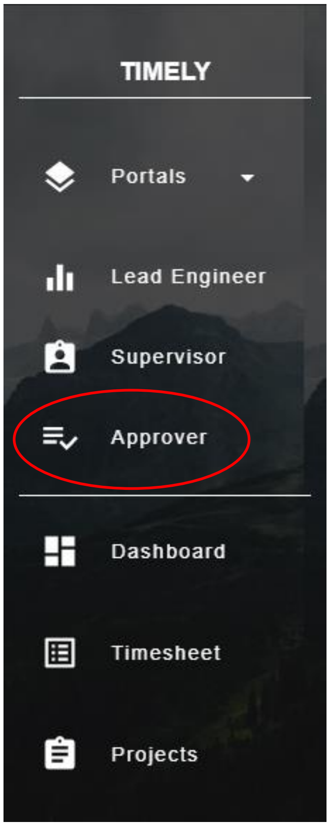
Timesheet Approver Portal

When an employee is assigned as the timesheet approver by a supervisor, or when the supervisor needs to approve an employee's timesheet, this is where they would go to fulfill their duties.

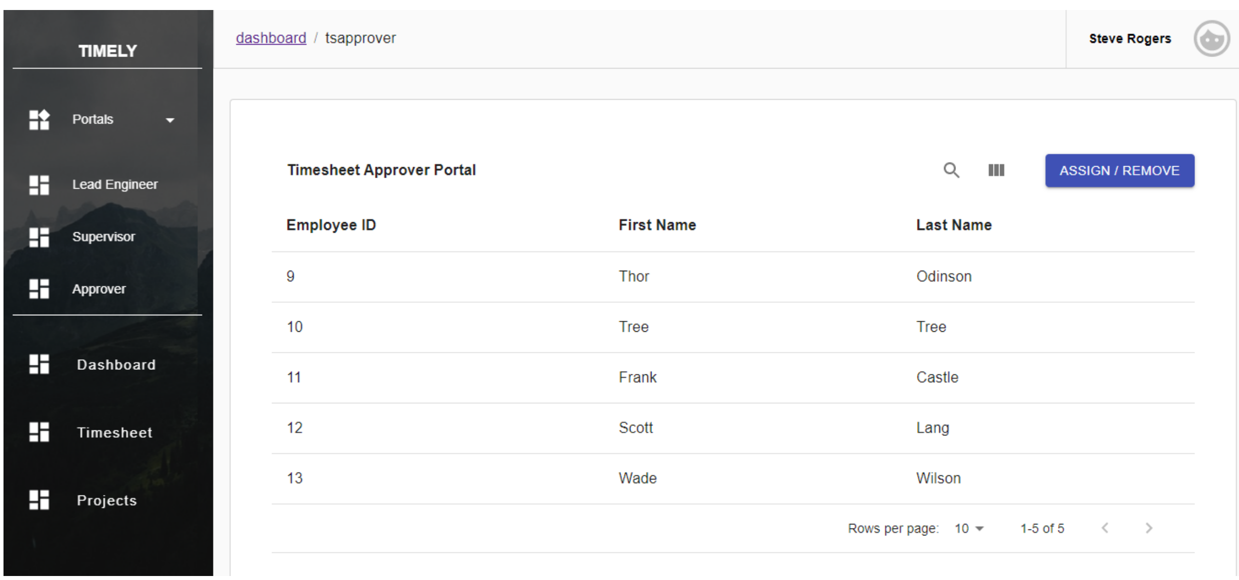
Approve/Reject a Timesheet

Typically, after a full week of work, Employees will submit their timesheets for approval. You, as a Supervisor/Timesheet Approver, must decide whether you want to approve or deny each employee's timesheet. The following instruction set assumes that you have an employee with a Timesheet that is ready to be approved.

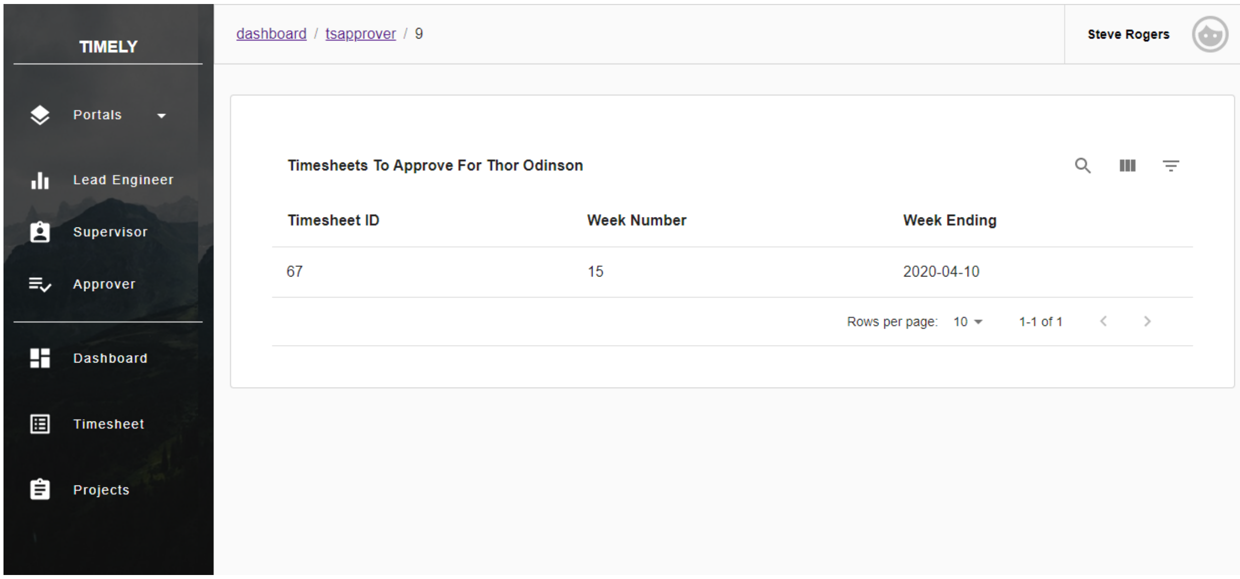
1. From the Dashboard page, click on the drop-down arrow, next to your name, on the left nav-bar
2. Select [Timesheet Approver] from the menu items



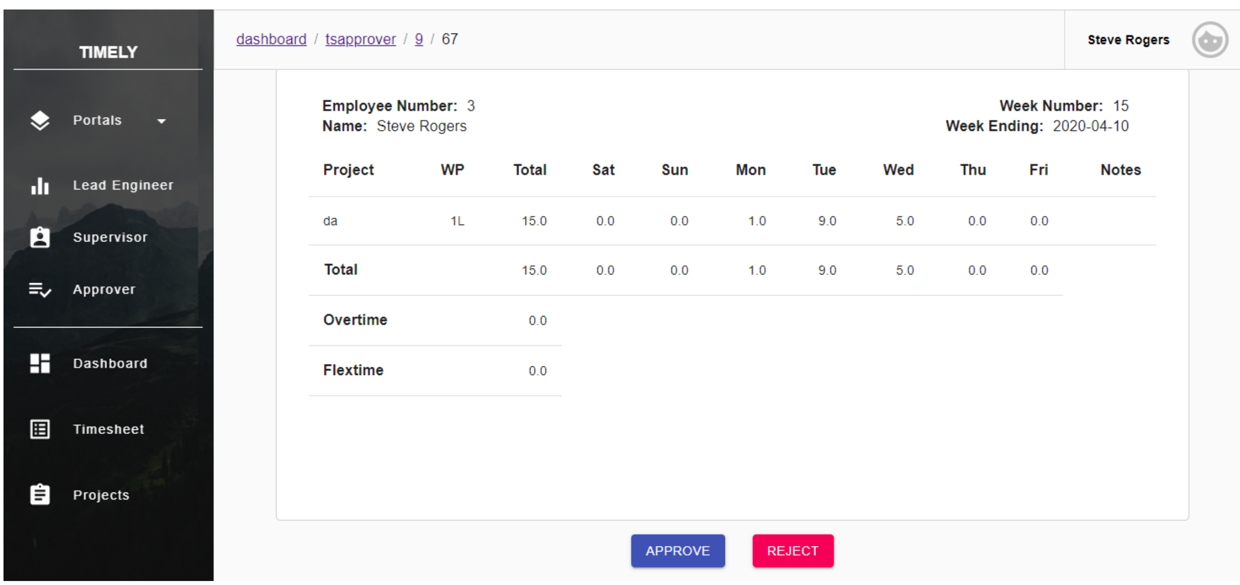
3. You will be directed to the Employees page. Here you will see which employee's you are the Timesheet Approver for



4. Click on the Employee that has a Timesheet available for approval
5. You will be shown a list of all of the timesheets that are available for approval, click on one.



6. After clicking on a timesheet, you will be shown its details. To approve or reject the timesheet look for the corresponding buttons at the bottom of the timesheet. For our example, we will click (Approve)



7. You will be redirected to the Timesheet list page for that user

You have successfully approved a timesheet for an Employee!

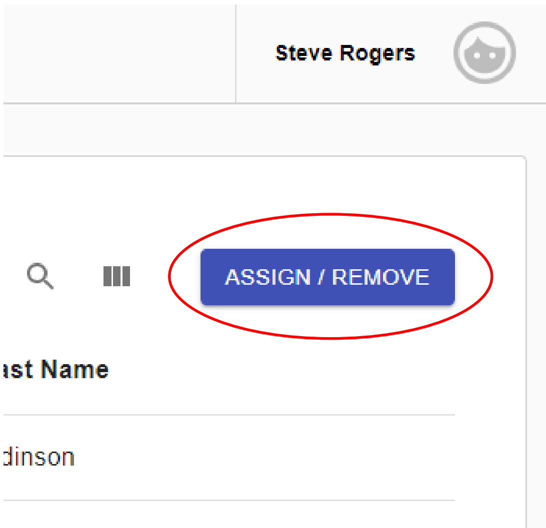
Assign Secondary Timesheet Approver

A supervisor can decide to assign one or more of their Employees as the Secondary Timesheet Approver. This employee, when granted permission, would gain access to the Timesheet Approver portal and would be able to approve the timesheets for the same set of employees as the supervisor. The following instruction set assumes that you are currently a supervisor of a set of employees.

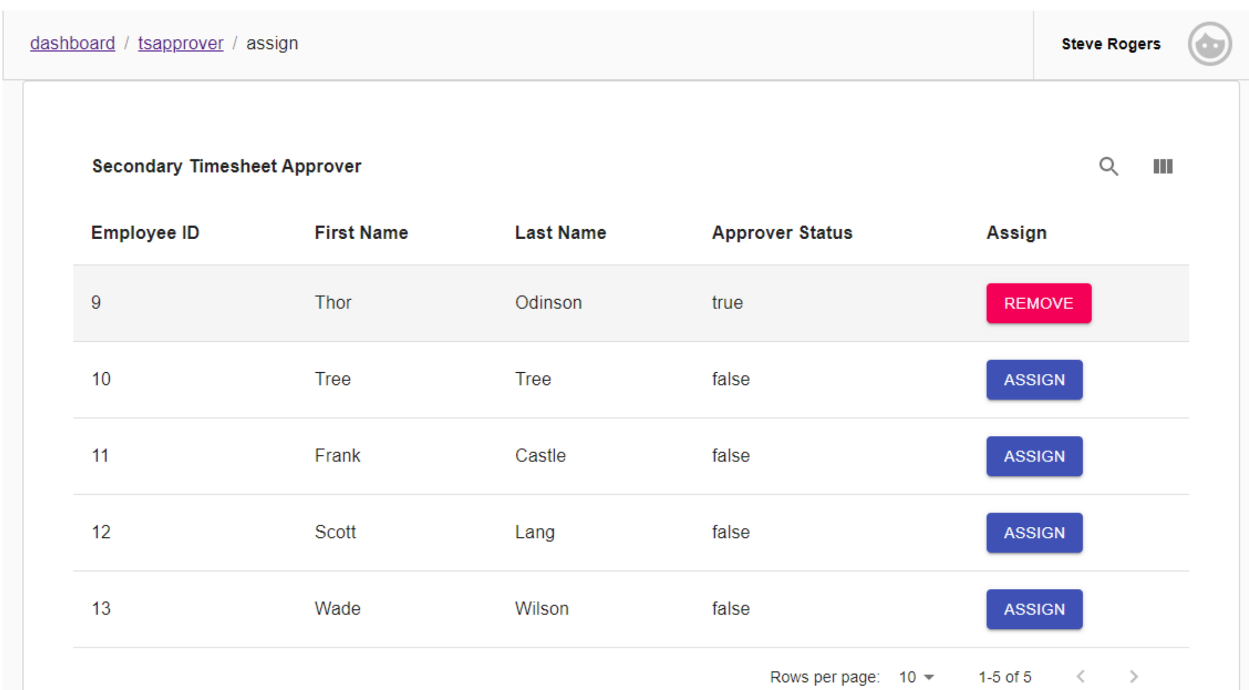
1. From the Dashboard page, click on the drop-down arrow, next to your name, on the left nav-bar
2. Select [Timesheet Approver] from the menu items

Here you should see a list of Employees currently under your supervision

3. Locate and click the (Assign/Remove) button on the top right of the page



4. On this new list of Employees, click (Assign), on the far-right column, on the ones you want to make Secondary Timesheet Approver.



5. If you wish to remove an employee's Approver privileges, click (Remove)

Congratulations, you have successfully assigned a Secondary Timesheet Approver. They now have access to the Timesheet Approver portal and can approve or deny timesheets.

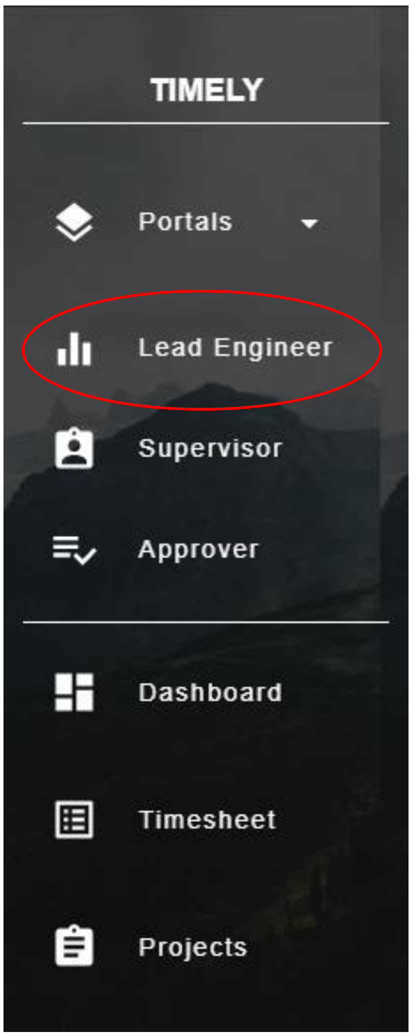
Lead Engineer Portal

The Lead Engineer Portal is where anyone who has been assigned as the Responsible Engineer of a Work Package can complete their duties, like entering planning and estimates for Work Package Reports

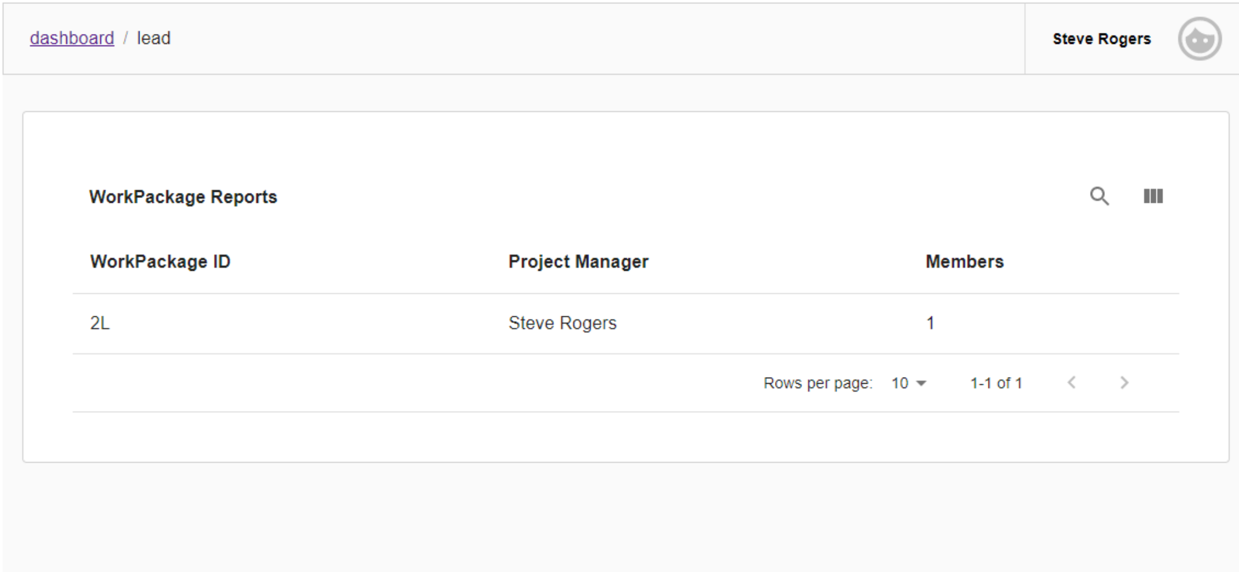
View/Edit Work Package Reports

The lead engineer is tasked with entering Work Package planning information that will be used by the system to generate a work package report. This report can be changed as new information is entered.

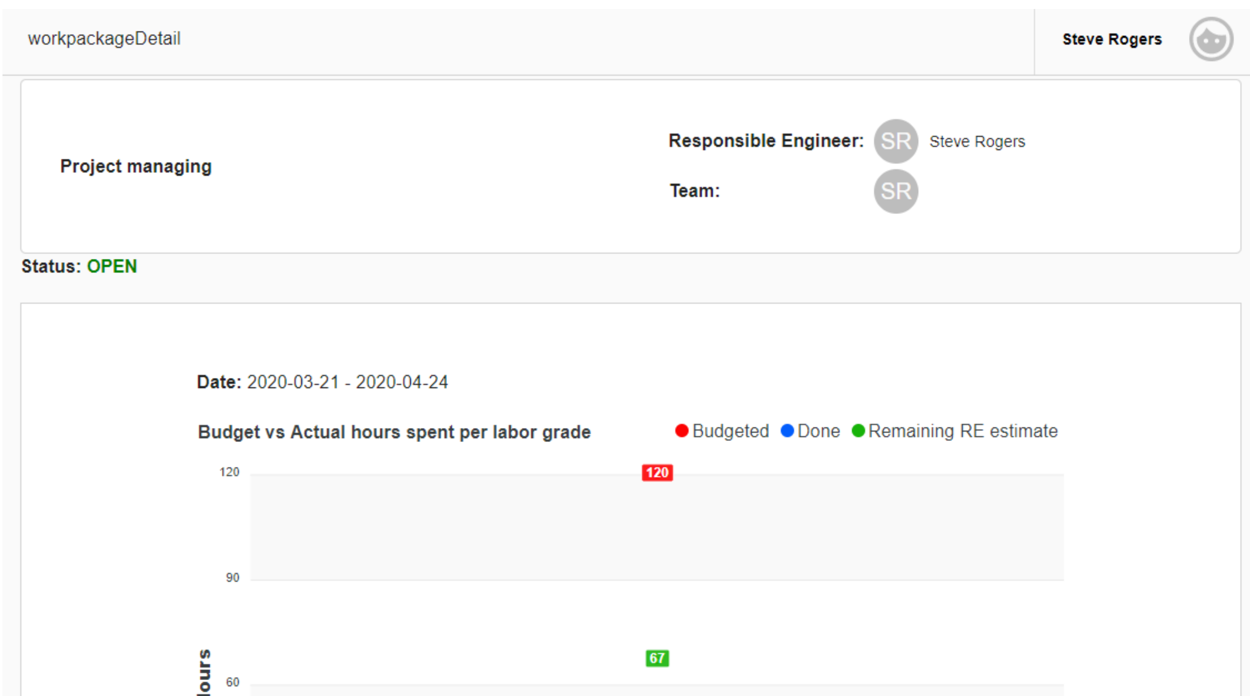
1. From the Dashboard page, click on the drop-down arrow, next to your name, on the left nav-bar
2. Select [Lead Engineer] from the menu items

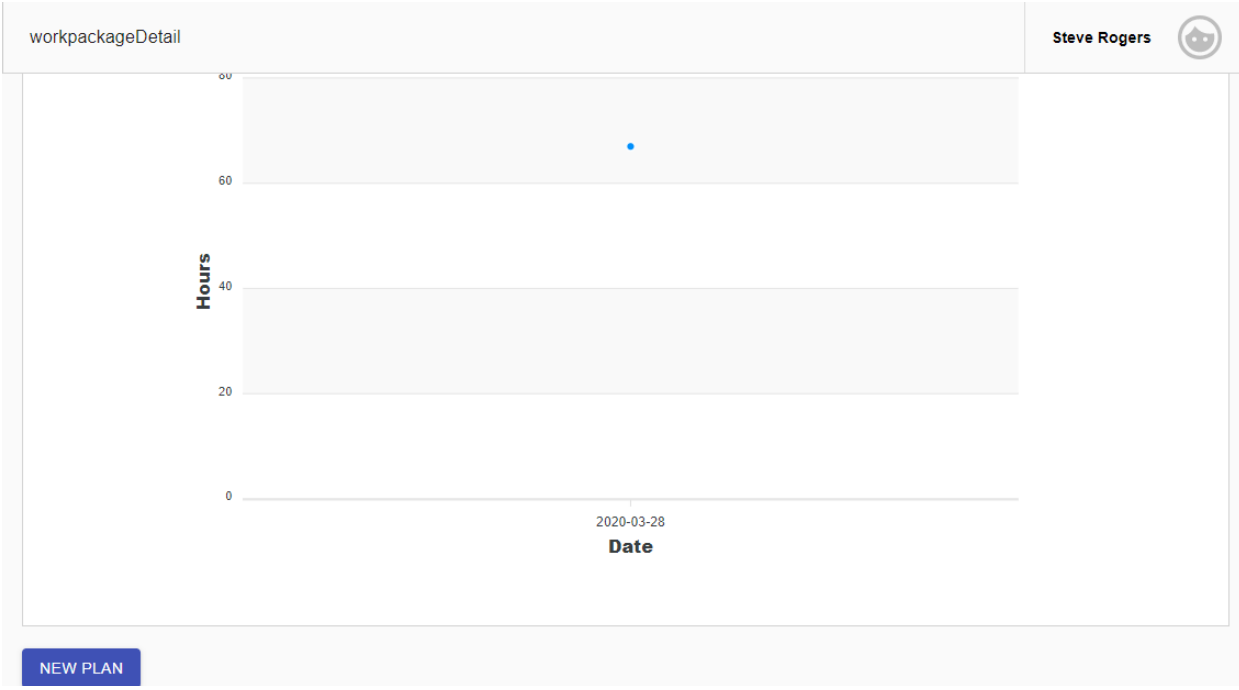


3. On the Work Package Reports page, you will see a list of the work packages that you are Lead Engineer for. Click on any Work Package Report.

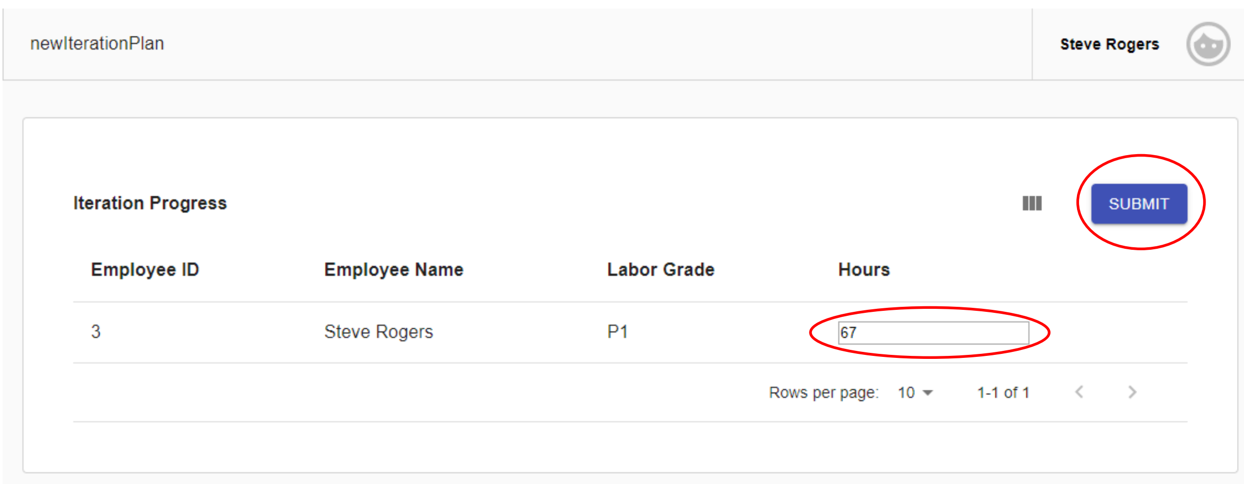


4. You will be directed to the Work Package Detail page, which will also include the current work package report.
5. Scroll down the page to view the full report





6. To enter new work package estimations, click (New Plan)
7. Here you can enter estimated hours, per employee assigned to this work package



8. Click (Submit) when you are done
9. Repeat steps 1-4 to return to the work package report
10. Observe the new estimated hours information in the graph.

Release Notes

- Employees do not have the ability to sign their timesheet
- There is no overtime and flextime validation when entering timesheet hours (sum must be <= total hours)
- HR create/edit forms does not have redirection after form submission
- The state of the Employee Creation form, for editing a password, does not change the default fields to blank after submission even though proper submission was made.
- No column to show role of employee in the HR portal table. Instead, have to click into the employee to be able to see employee roles.
- Nothing saved for unknown reason when timesheet approver rejects a timesheet
- Secondary timesheet approver can approve their own timesheet
- Lead Engineer portal renders for all employee roles.
- Making new iteration plan in work package details has no redirection.