User Manual

Client Portal to reduce back and forth for website development

- Kartik Bhalala (23244793)
- Scarlett Peng (23985879)
- Pavan Potukuchi (23866945)
- Janki Prafulbhai Rangani (24095031)
- Jiaheng Gu (23925667)
- (Chris) Yuchen Wang (23769386)

1. Introduction:

This User Manual provides a comprehensive guide to using the Client Portal to Reduce Back-and-Forth for Website Development. This document provides a detailed guide on how to set up and use the system, covering both User and Admin Dashboards.

System Overview:

- **Backend**: The backend of the application is built using **Flask**, a lightweight Python web framework and **PocketBase**, which handles the database, authentication and data storage.

- **Frontend**: The user interface is developed using standard **HTML**, **CSS**, **JavaScript** and **Bootstrap** to ensure a responsive and user-friendly experience.

Purpose of This Manual:

This manual will guide you through:

- Setting up the backend components (Flask and PocketBase).
- Running the application and accessing the dashboards.
- Managing user authentication, file uploads, and data through the system.
- Admin-specific functionalities, such as managing users, projects, and clients.
- Finding support resources for common issues with both the backend and frontend.

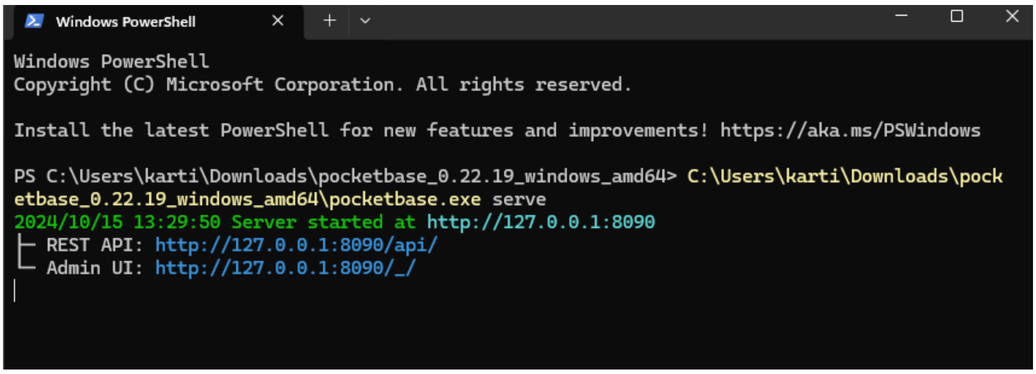
By following the instructions provided in this Manual, you will be able to successfully set up and run the application, as well as use its features effectively.

2. Setting up PocketBase:

Before running the application, we need to set up **PocketBase** to handle user data, file storage and other backend functionalities. Follow the steps below to ensure PocketBase is set up correctly:

2.1 Download and Run PocketBase

- Download PocketBase: Visit the official PocketBase website and download the latest version here.
- **Start PocketBase**: Open your terminal and run the following command to start the pocketbase: `./pocketbase serve`



2.2 Initial Setup for PocketBase

When running PocketBase for the **first time**, you need to perform an initial setup, including creating an **admin user** who will manage the PocketBase backend.

1. **Open PocketBase in the browser**: Once the server is running, open your browser and navigate to **http://127.0.0.1:8090/_/**. This will open the PocketBase Admin Panel.

2. **Create an Admin User**:

- You will be prompted to create an **admin account**.
- Enter a username, email, and a secure password for the admin account.
- This admin account will have full access to the PocketBase backend, allowing you to manage collections, users, and data.

2.3 Setting up Collections

You don't need to manually create collections since the schema is already provided in your GitHub repository. Follow these steps to import the collection schema:

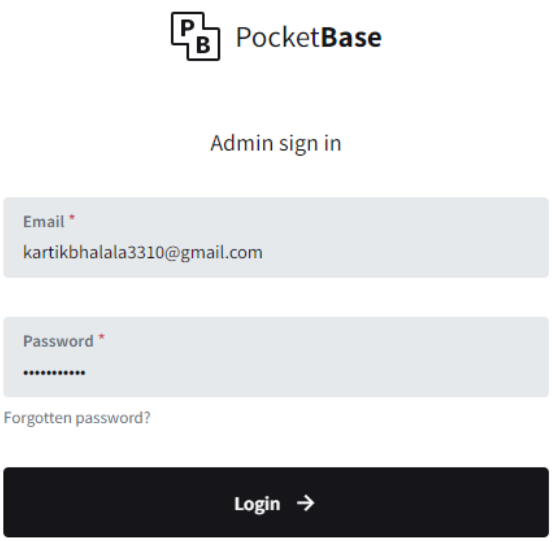
1. Download the Schema File:

- The schema for the collections is stored in a schema.text file in your project's GitHub repository.

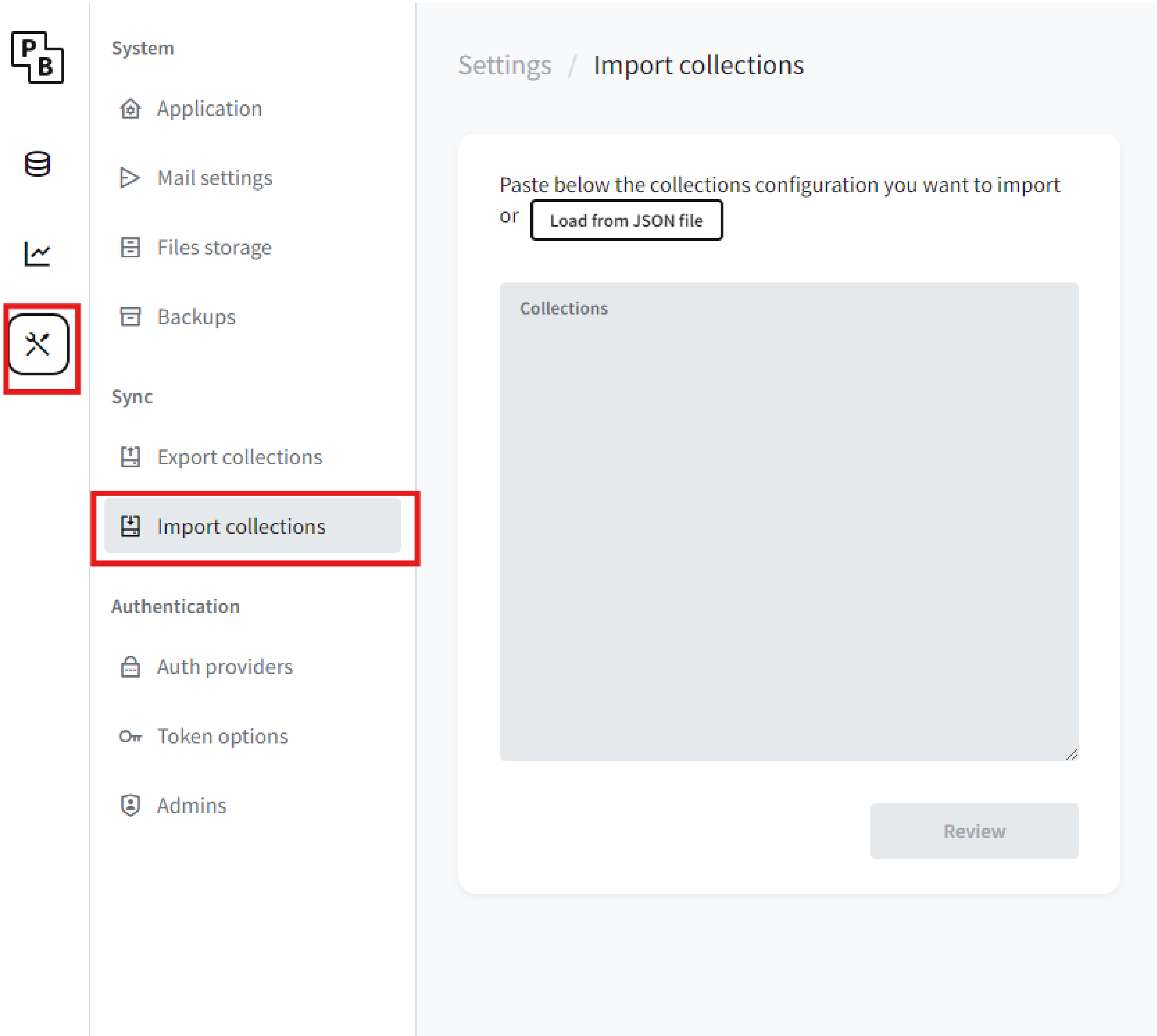
- You can download the schema file from the repository or access it directly from GitHub.

2. Import the Schema into PocketBase:

- Log in to the PocketBase Admin Panel using your admin credentials.



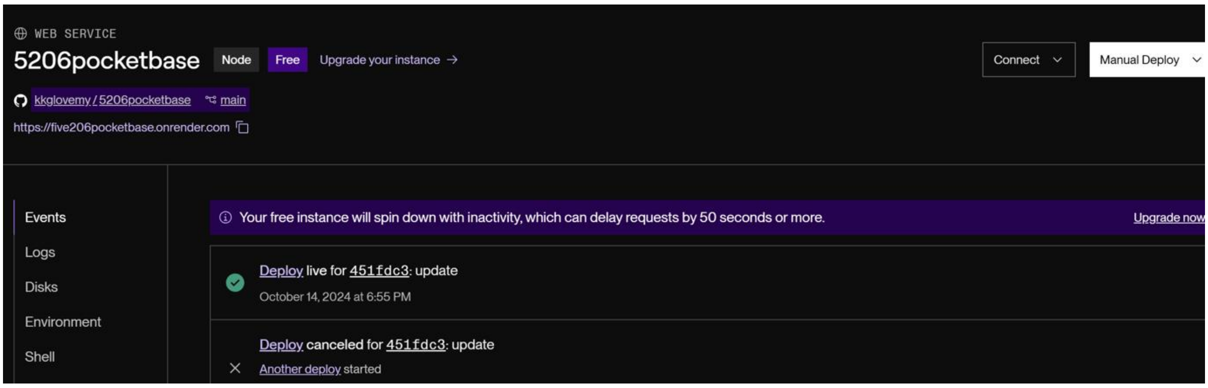
- Navigate to the **Settings** or **Collections** section of PocketBase.
- Use the **import feature** in PocketBase to upload the schema.text file.
    - There should be an option to **import collections** from a JSON file.
    - Select the schema.txt file from your system.



- PocketBase will automatically create the necessary collections, fields, and settings based on the imported JSON schema.

2.4 Deployment declarations:

To ensure consistency across environments, we have deployed PocketBase on a cloud service. The previously locally hosted PocketBase instance (http://127.0.0.1:8090/) has been replaced with a centralized, cloud-hosted version at **https://five206pocketbase.onrender.com/**, using HTTPS to enhance security and protect user data during transmission.



Due to the limitations of the free plan on Render, the deployed PocketBase instance reverts to its initial state every hour. As a result, all data and collections will return to their default settings at the time of deployment. Therefore, if you are testing or developing on this platform, it is important to periodically back up any data or changes made during each session.

3. Running the Flask Application:

With PocketBase set up, we can now start the Flask application, which serves the frontend and interacts with PocketBase.

3.1 Start the Flask server

To start the Flask application:

1. Open your terminal and navigate to the project directory.
2. Run the following command to start Flask:

    ```
    flask run
    ```

3. Flask will run on http://127.0.0.1:5000 by default.

3.2 Accessing the application

When accessing the application for the first time, the admin user will need to log in using the credentials created during the PocketBase setup. The login screen is designed for both admin and client users. Based on the credentials entered, the user will be redirected to the appropriate dashboard.

Login Screen Overview

- The login screen is a **unified interface** for both **admins** and **clients**.

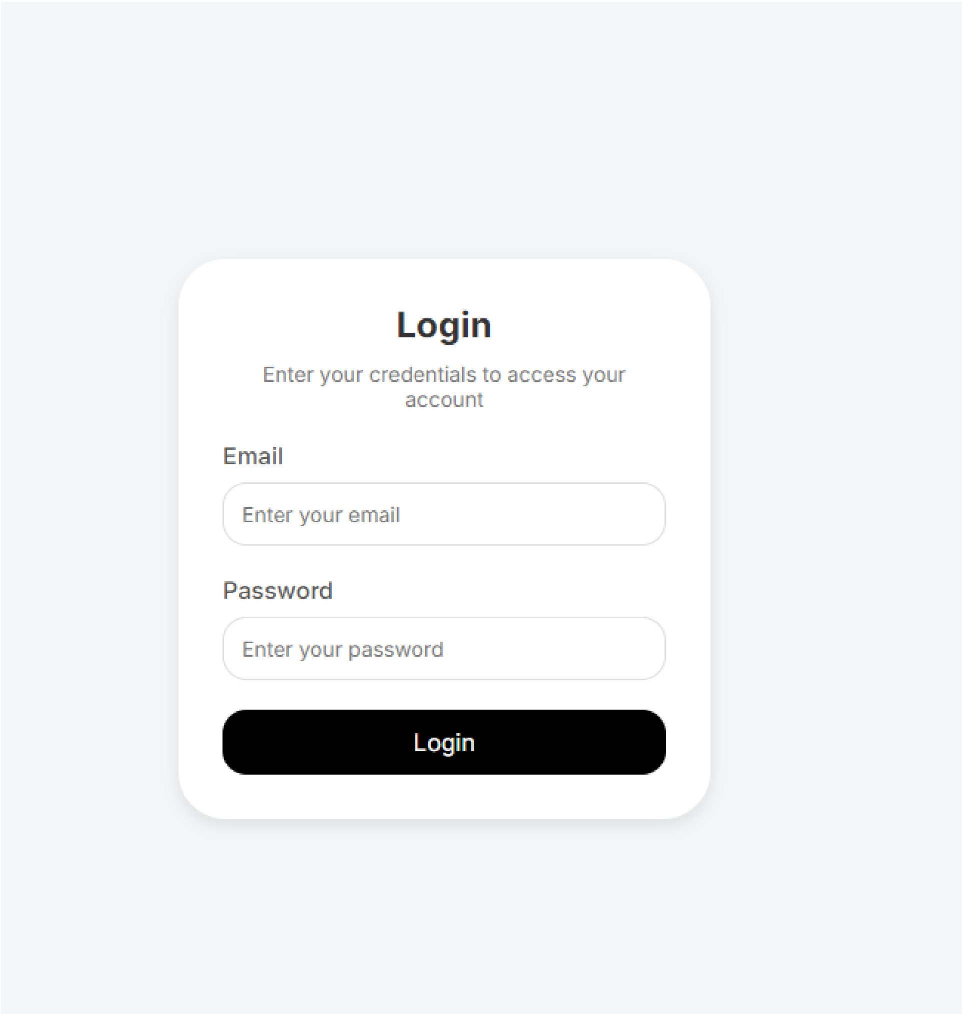
- After submitting the credentials, Admins will be redirected to the Admin Dashboard and the Clients will be redirected to the Client Dashboard.

Steps for Admin Login:

1. Access the Login Page: Navigate to http://127.0.0.1:5000/login.

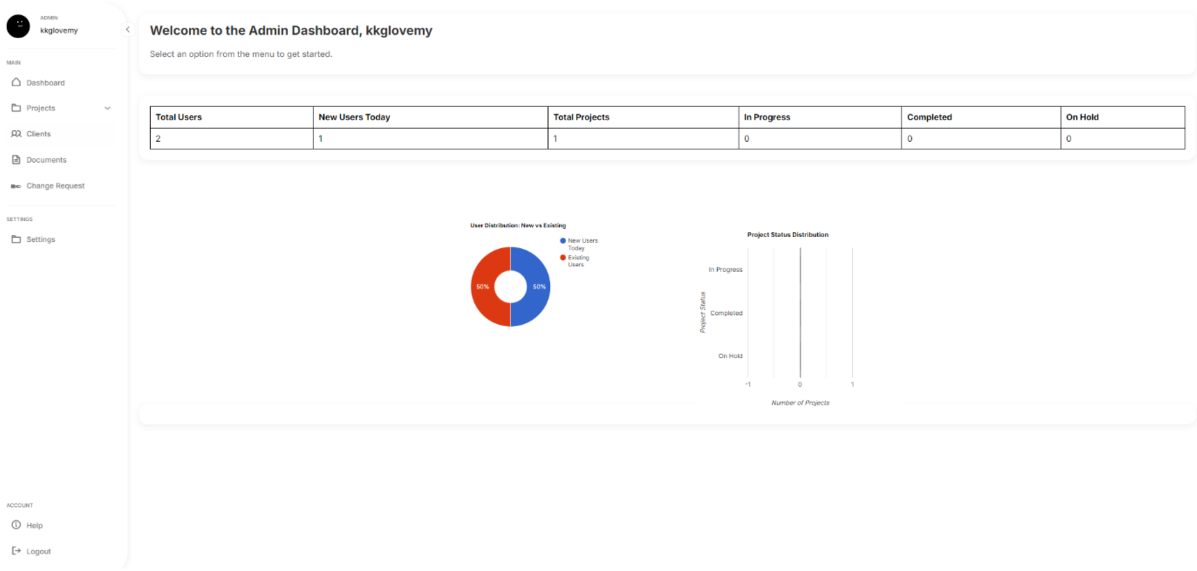
2. Enter Admin Credentials:

- Use the admin credentials created during the PocketBase setup.
- Admins will enter their email and password.
- Click the Login button.



3. Redirection to Admin Dashboard:

- Upon successful login, the admin will be redirected to the Admin Dashboard, where they can manage clients, users and projects and documents.



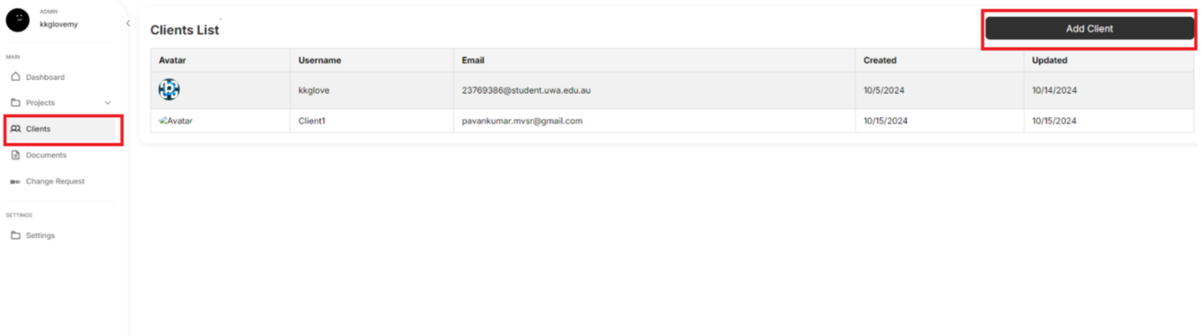
3.3 Adding new Clients (Admin)

Once logged in as an admin, you can begin managing the system, including adding new clients. Follow the steps below to add new clients via the Admin Dashboard.

Steps to Add New Clients:

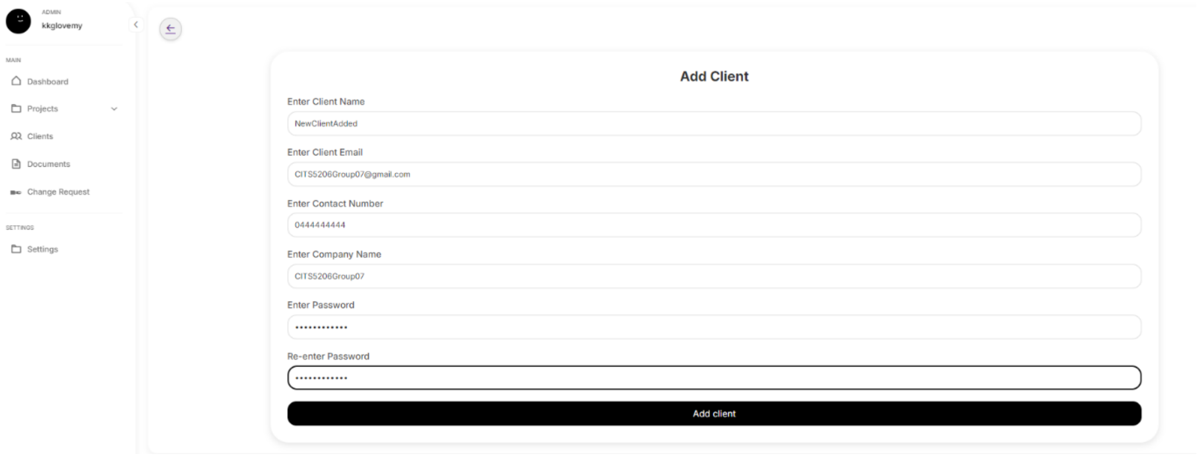
1. **Navigate to Clients Section**:

- In the **Admin Dashboard**, look at the navigation menu on the left-hand side.
- Click on the **Clients** button to open the client's management interface.

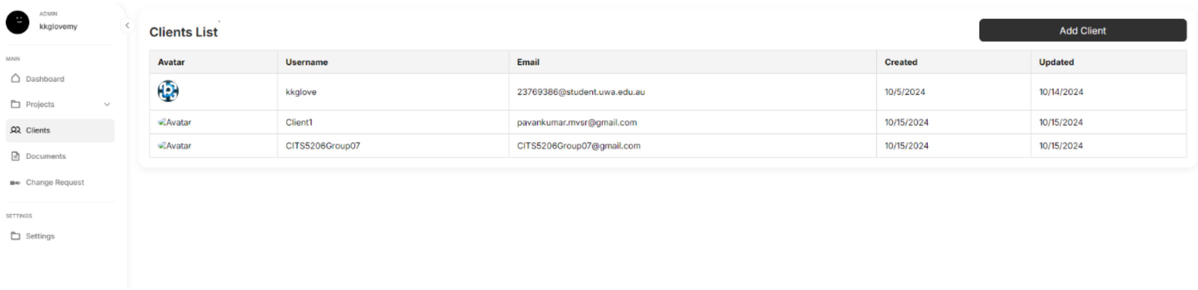


2. **Add a New Client**:

- In the **Clients** section, click the **Add Client** button.
- A form will appear where you can enter the client's details, including:
  - **Client Name**
  - **Email**
  - **Contact Number**
  - **Company Name**
  - **Password**
- Once the form is filled out, click **Submit** to add the new client to the system.



After submission, the new client will appear in the **Client List**, where you can view and manage all registered clients.

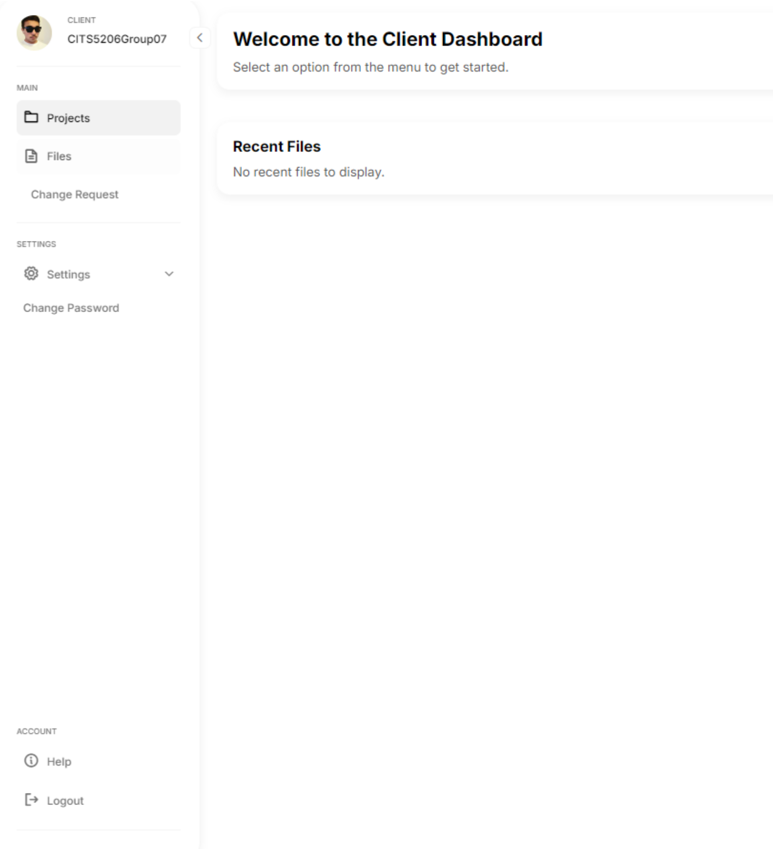


3.4 Logging in as a Client

Clients will use the **same login screen** as admins, but upon login, they will be redirected to their own **Client Dashboard**.

Steps for Client Login:

1. **Access the Login Page**: Clients should also navigate to **http://127.0.0.1:5000/login**.
2. **Enter Client Credentials**:
    - Clients will enter their username and password provided by the admin.
    - Click the **Login** button.
3. **Redirection to Client Dashboard**:
    - After logging in, clients will be redirected to the **Client Dashboard**, where they can view their associated projects, submit change requests, and interact with the system.

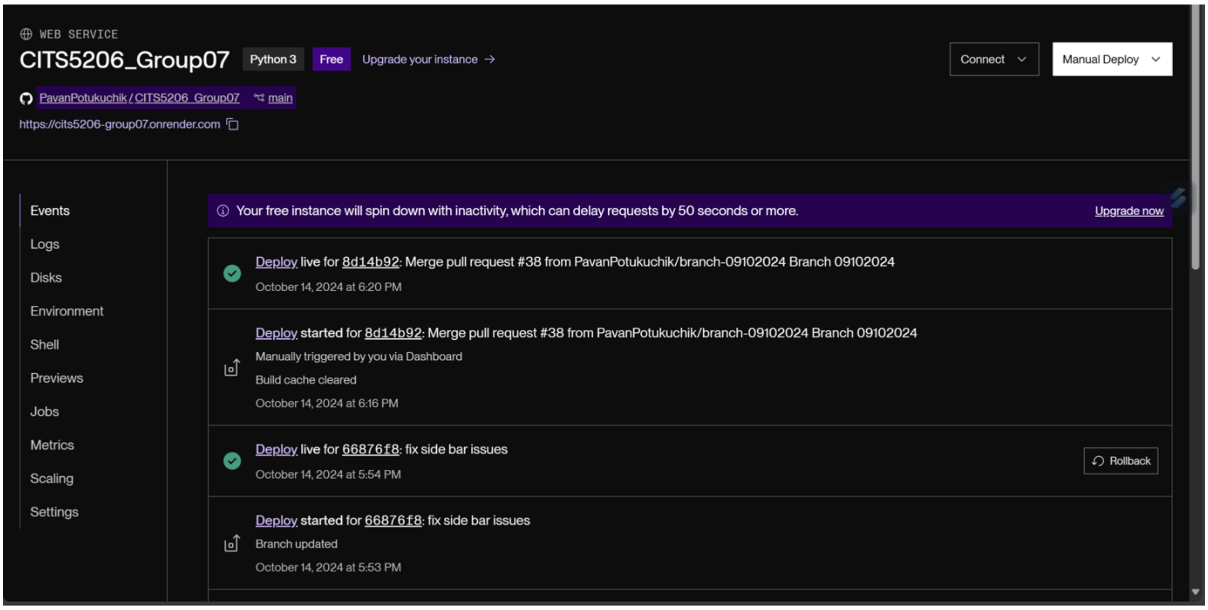


Additional Note: The system automatically detects the role of the user based on the credentials stored in PocketBase, ensuring secure access to the correct dashboard.

3.5 Deployment

The deployment document URL is https://hackmd.io/@kkglove/BJiqC6CRA

We deploy the application on https://cits5206-group07.onrender.com/ with render.

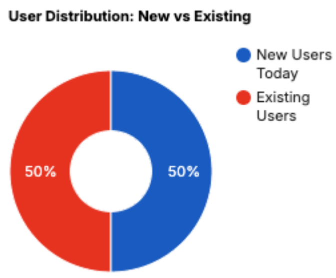


4. System Functionalities:

4.1 Dashboard (Admin):

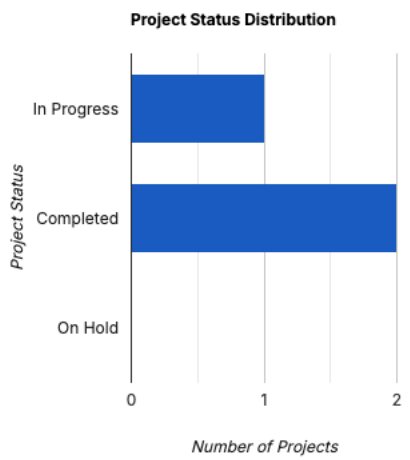
The Dashboard feature is the first page the user will see after login and is the crucial part to have an overview of the real-time data about the current clients and projects statistics. This can save time for the client by having an overall idea about all the clients and projects statistics without going into each client and projects details. Here are the main functionalities of the Dashboard:

1). User Statistics:



- Displays the total number of users.
- Shows the number of new users added today.
- Data is fetched in real-time from the database.
- Visualized using Google Charts for easy interpretation.

2). Project Status Statistics:



- Provides a breakdown of projects categorized by status: "In Progress," "Completed," and "On Hold."
- Helps the admin monitor project progress and manage workloads effectively.
- Uses real-time data for up-to-date project tracking.
- Dynamic Username and Profile Display:
- Shows the admin's username and profile picture.
- Data is fetched from the authentication token.
- Enhances personalization by displaying the admin's details on the dashboard and top corner of the page.

3). Overview Table:

Total Users	New Users Today	Total Projects	In Progress	Completed	On Hold
2	1	1	1	0	0

4). Customization:

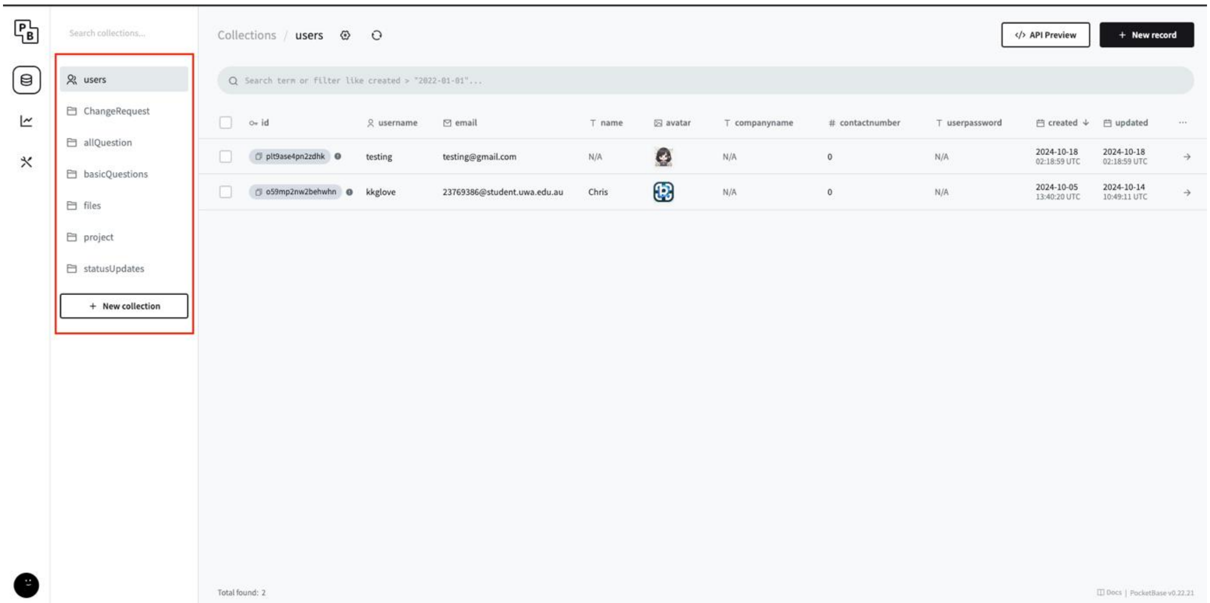
The dashboard's features can be adjusted based on client feedback to meet specific needs. The project status has been set as 3 statuses: **In Progress, Completed** and **On Hold.** The status can be modified and customized if the client wanted to classify the projects status in a different way.

To see the dynamics of the dashboard:

1. Use our [deployed PocketBase page] and login as an admin with:

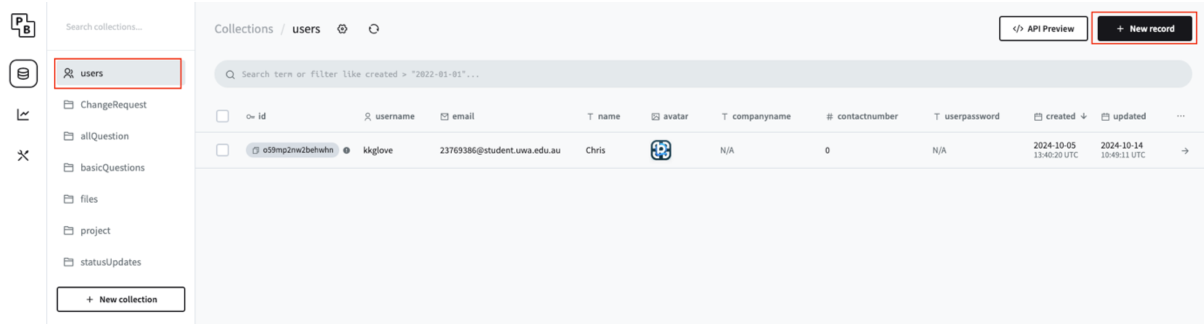
Admin email: demo@gmail.com
Password: password 1234

This will lead to our website where admin can manage users and projects:

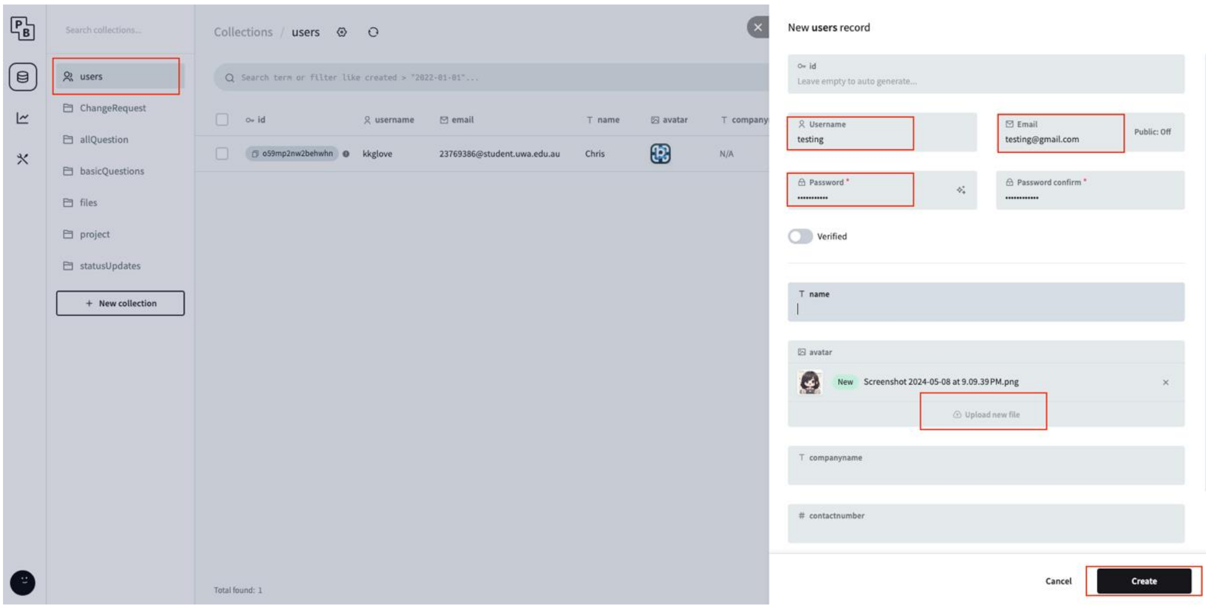


2. Create a new user:

1). Click on the “users” collection on the top and click on “New record” on the top right.



2). Enter the details for the new users: Usernames, Email, Password, upload Avatar profile picture etc. Then click on “Create” at the bottom.



3). Then login to the [Client Portal]() website and login as an admin use the same credentials for PocketBase:

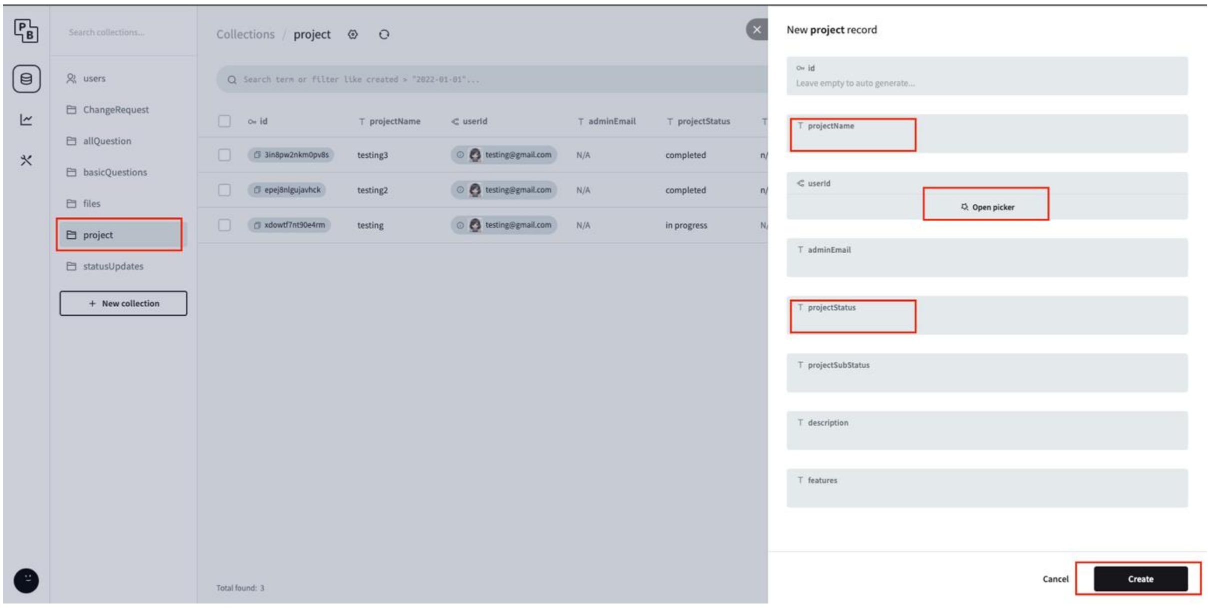
Admin email: demo@gmail.com

Password: password1234

You should see the changes in the dashboard.

3. Create a new project:

1). Click on the “project” collection on the top and click on “New record” on the top right.



2). Enter the details of a project and “Create”

3). Then login to the Client Portal website and login as an admin use the same credentials for PocketBase:

Admin email: demo@gmail.com

Password: password1234

You should see the changes in the dashboard.

4.2 Document management (Admin and Client):

The Document Management feature allows both admins and clients to upload, manage and view documents related to projects or user profiles. Clients can upload files with descriptions and admins can manage these files, including viewing, downloading and deleting them as needed.

1) Client Document Management:

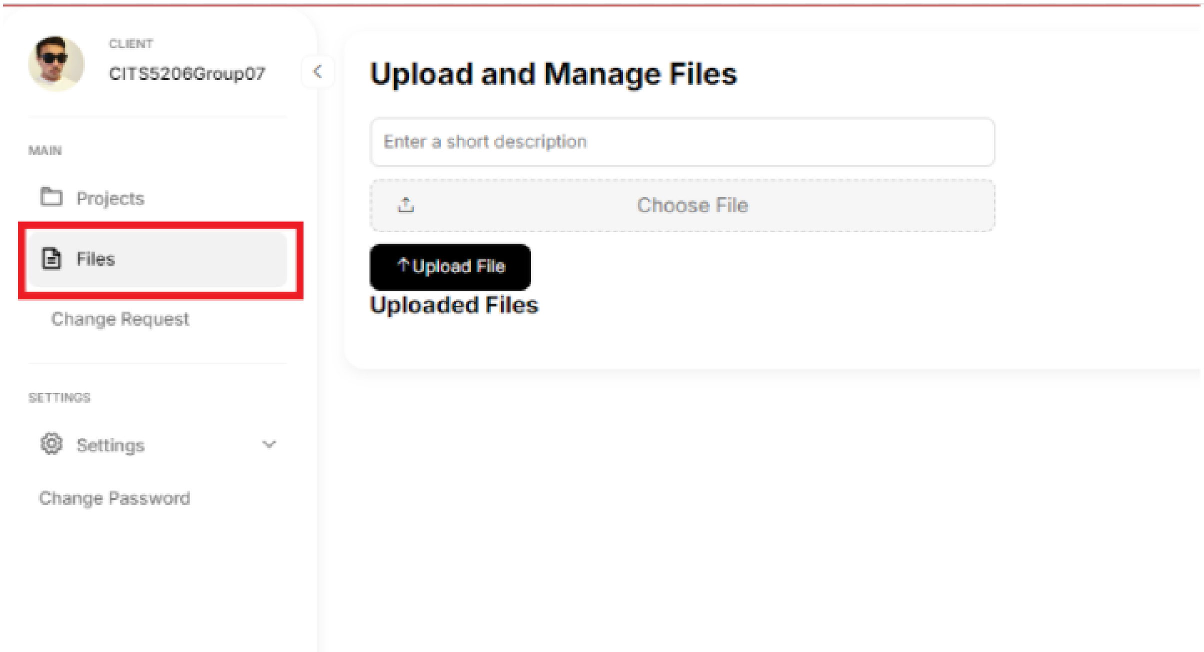
Clients have access to upload and manage documents from their dashboard.

Steps for Clients to Upload Documents:

1. **Navigate to the Files Section**:
   - In the **Client Dashboard**, clients can find the **Files** option in the navigation bar on the left-hand side.
   - Click on **Files** to access the document upload section.

2. **Upload a New Document**:
   - On the **Files** page, clients can upload a document by clicking the **Upload File** button.

- When uploading a file, clients are required to provide a **description** for the file. This description will help the admin understand the context of the uploaded document (e.g., "Project Requirements Document" or "Blueprint for Phase 1").



3. **Submitting the File**:
    - After selecting the file and writing a description, click **Submit** to upload the document.
    - The document is uploaded to the system and stored in PocketBase under the files collection, associated with the client's profile and project.

Viewing Uploaded Documents:

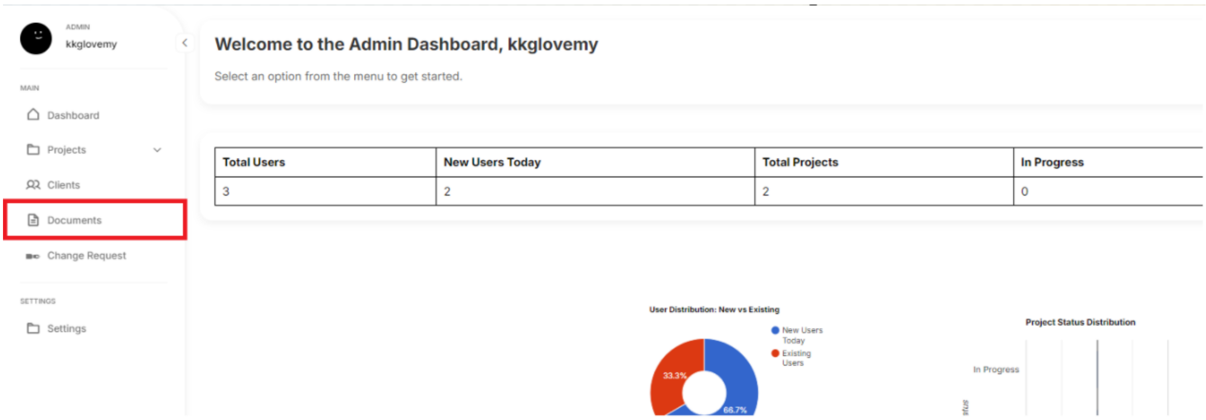
- Once uploaded, clients can see a list of the files they've uploaded in the **Files** section.
- They can also view the descriptions they've provided for each file.
- Files cannot be edited by clients once uploaded, but they can be **re-uploaded** if needed.

2) Admin Document Management:

Admins can manage all documents uploaded by clients, allowing them to review, download and delete files as needed. Admins access documents through the Documents section of their dashboard.

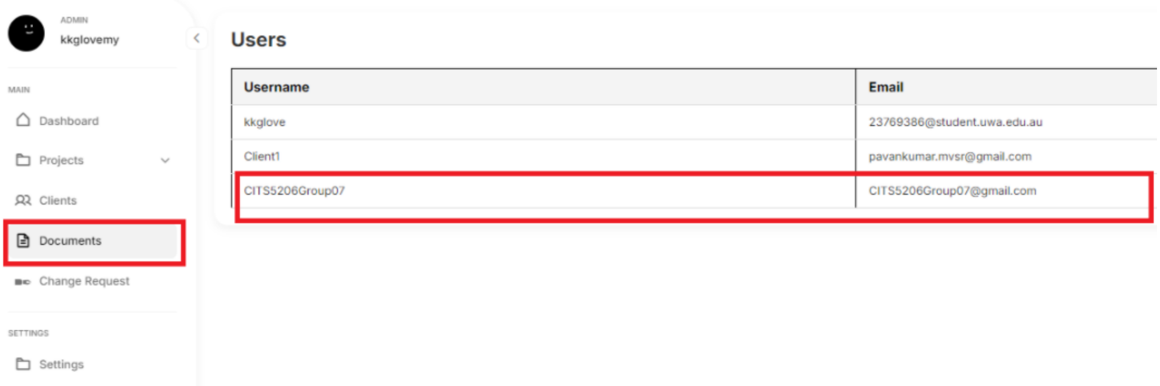
1. **Access the Documents Section**:

- In the **Admin Dashboard**, click on **Documents** in the left-hand navigation menu to view a list of clients who have uploaded files.

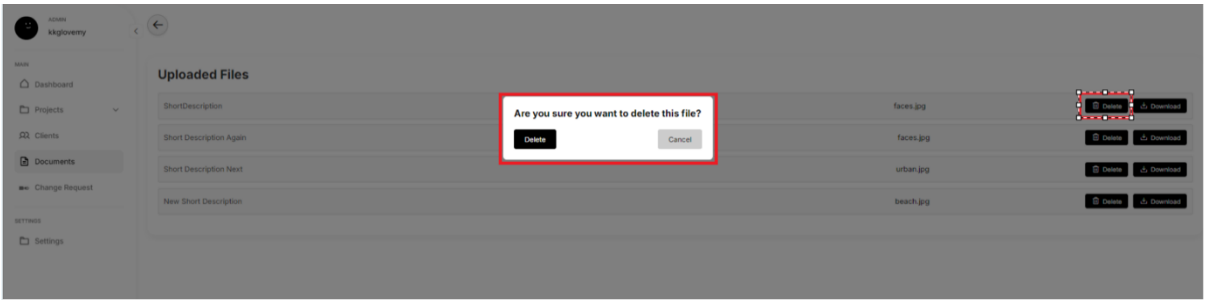


2. **View and Manage Client Files**:

- Click on a client's name to see their uploaded documents.
- Each file is listed with its **description** provided by the client.
- Admins can **download** files by clicking the **Download** button or **delete** them by clicking **Delete**.



When admin clicks Delete, a confirmation prompt will appear to prevent accidental deletion. The admin must confirm the action before the file is permanently removed.



4.3 Managing Projects:

4.3.1 Create Project (via web app):

This feature allows the admin to add new project and questionaries that they want to ask their clients.

Steps to create new project:

4.3.2 Project list/details

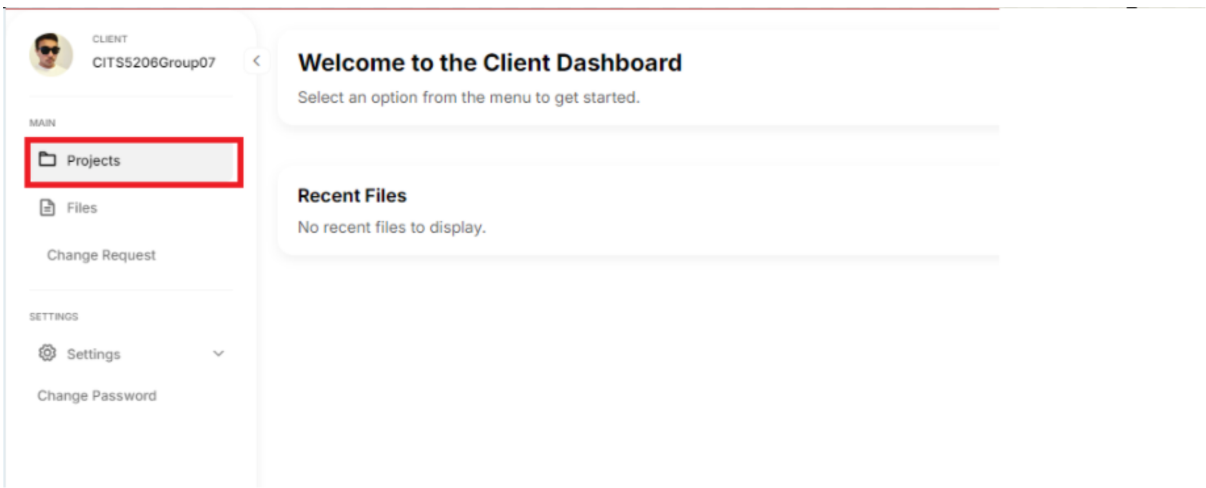
The Project Management feature allows both admins and clients to view project list and detail of each project.

1) Client Project Management:

Clients have access to view project list and details from their dashboard.

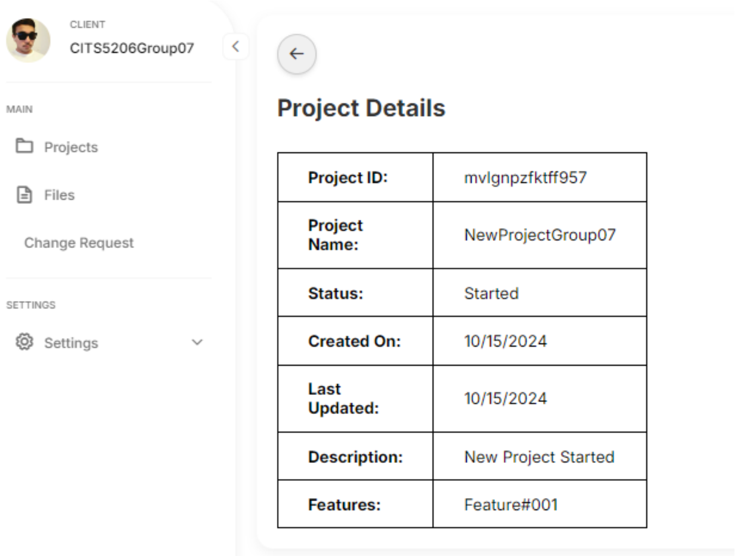
Steps for Clients to View Project:

1. **Navigate to the Projects Section**:
   - In the **Client Dashboard**, clients can find the Project**s** option in the navigation bar on the left-hand side.
   - Click on **Projects** to access view project section.



2. **Click one specific project**:

3. **View the details:**



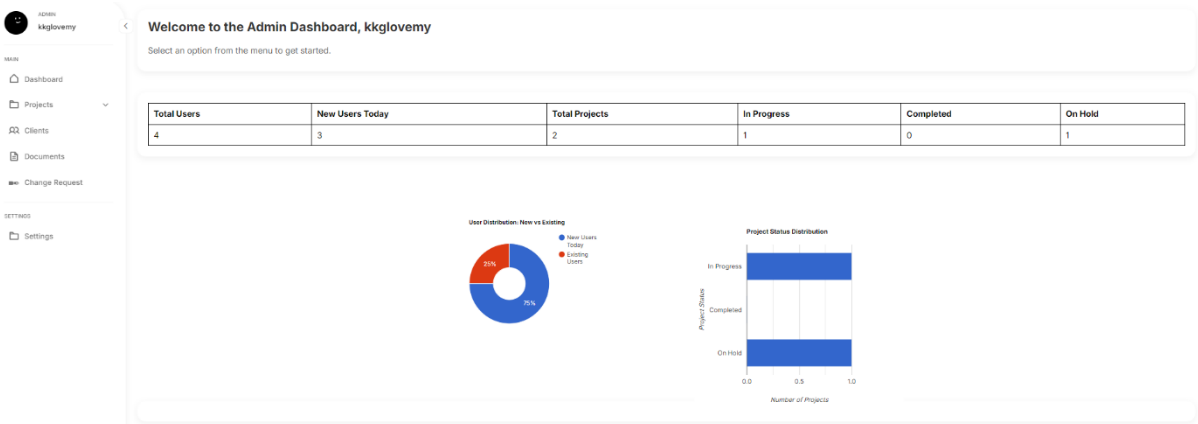
2) Admin Project Management:

Admins have access to view project list including all the project from different clients and details from their dashboard.

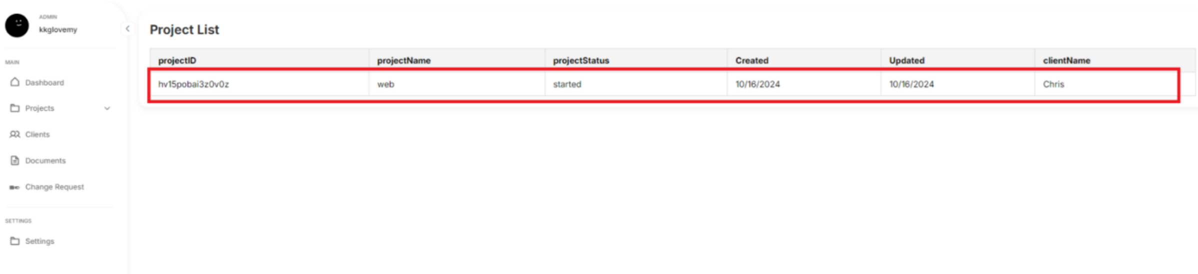
Steps for Admins to View Project:

1. **Navigate to the Projects Section**:

   - In the **Admin Dashboard**, admins can find the Project**s** option in the navigation bar on the left-hand side.
   - Click on **Projects** to access view project section.

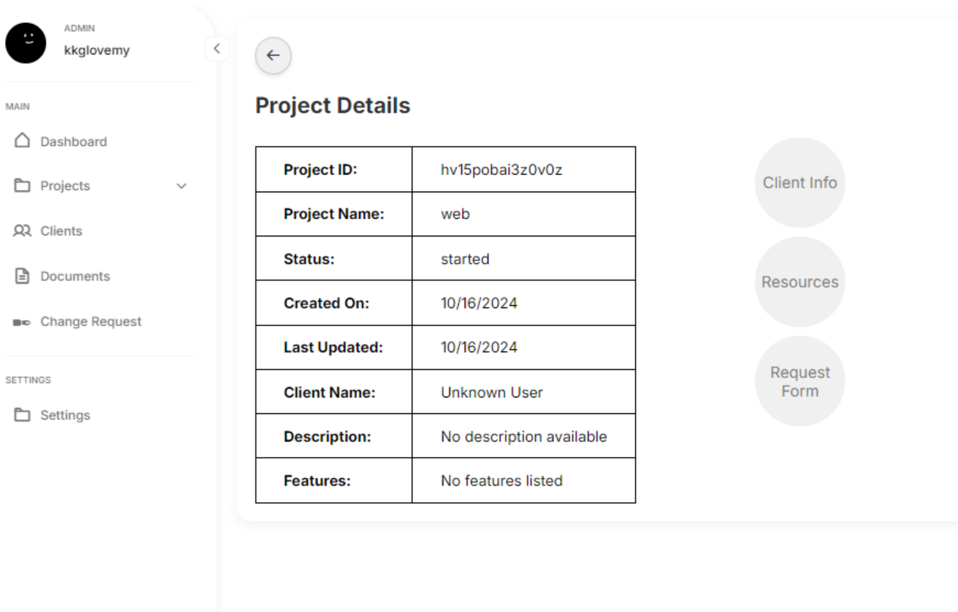


2. **Click one specific project**:



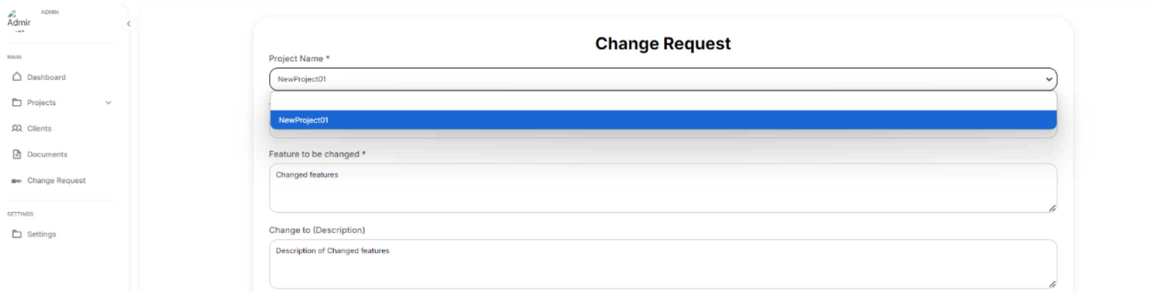
3. **View the details**:

   - There are three buttons which can redirect you to different pages. I.e. resources button can redirect you to the Chris's file page.

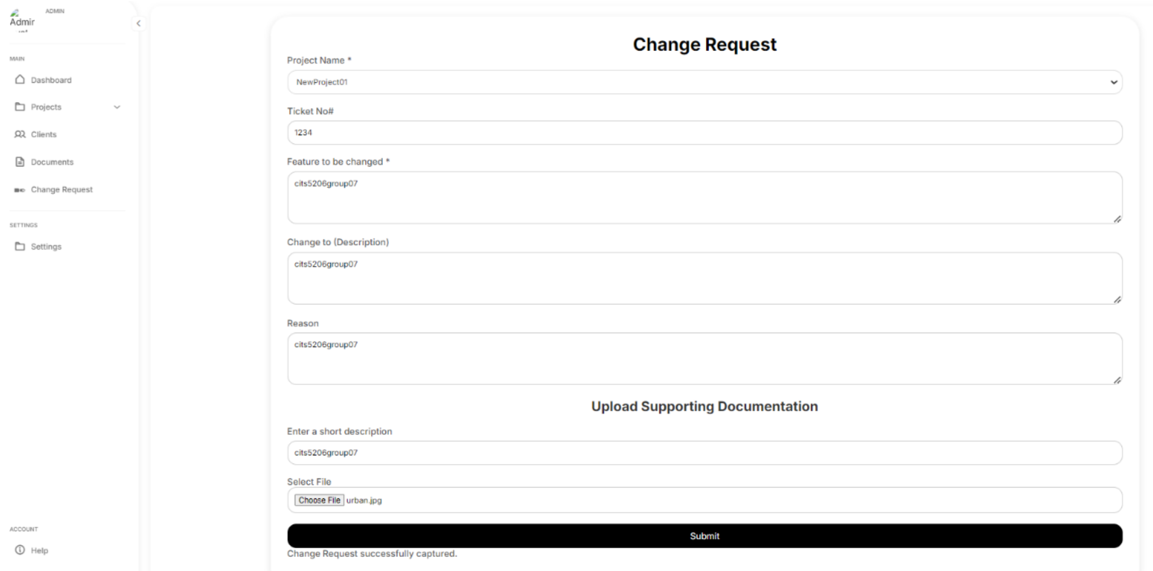


4.4 Change request Form (Pavan):

- Feature for client and admin for submission of change requests for ongoing projects.
- Project selection dropdown will display only the projects of the client selected.

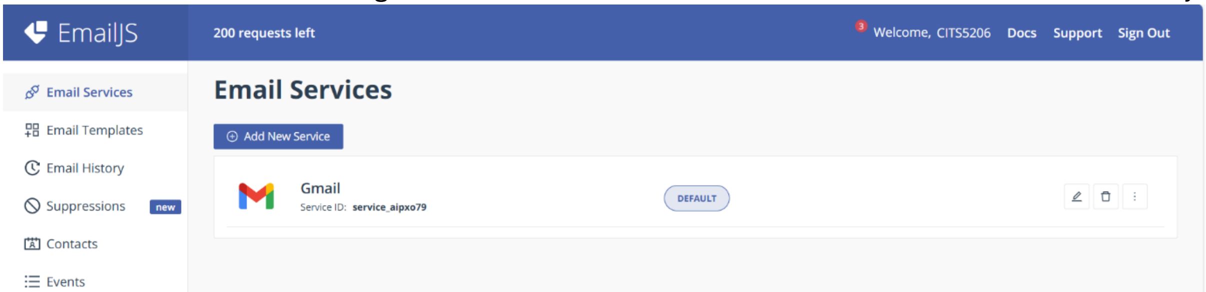


Upon providing all the valid details and upon submission of the Change request form – a message "Change Request successfully captured." is displayed.

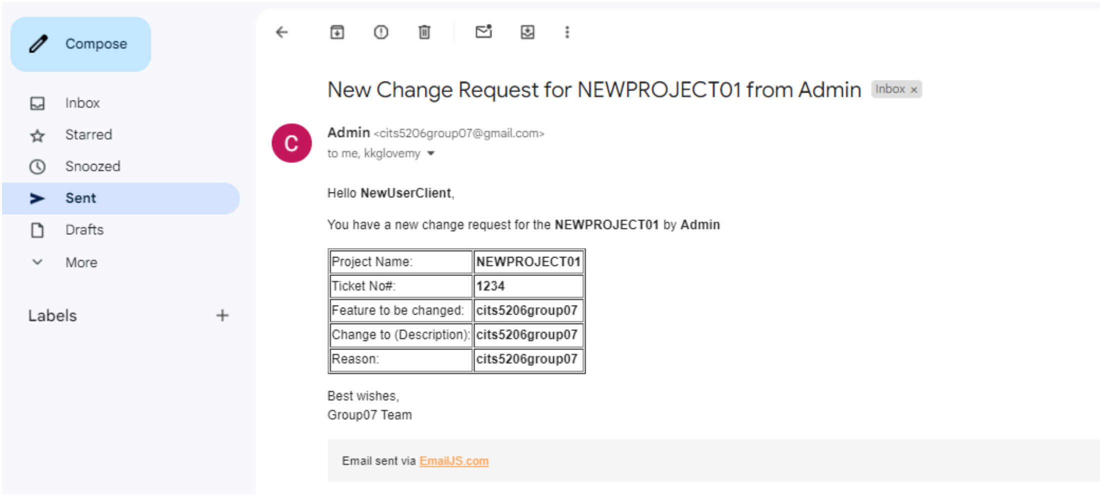


Email notification is sent through third-part tool - 'emailjs' to both the admin and client on submission, ensuring they are informed about the change request.

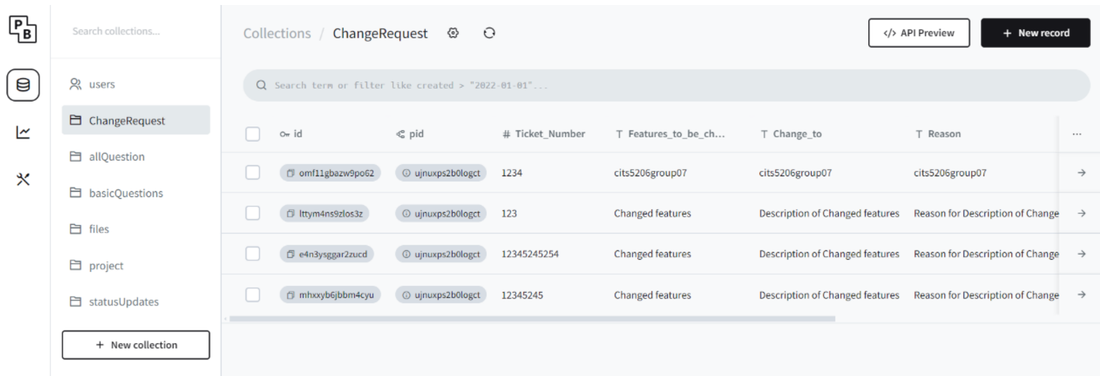
The registration in emailjs



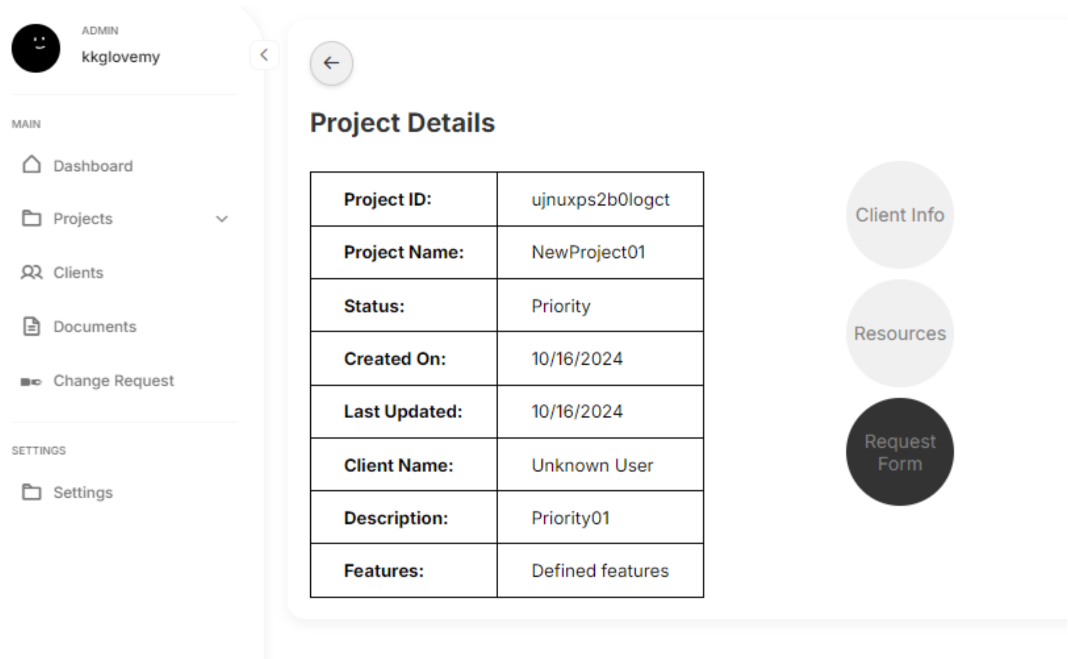
- Email includes key details such as the project name, ticket number, and change description. Both parties stay informed, enhancing collaboration and reducing communication gaps.



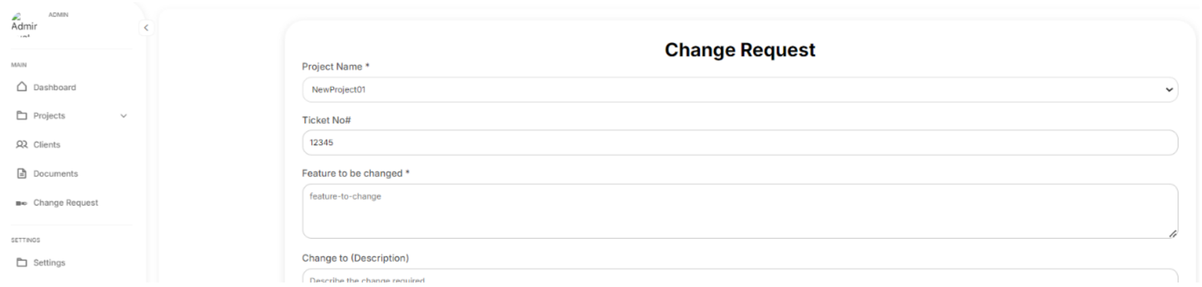
- Admin will be able to track Change requests reflected in real-time on the pocketbase, providing up-to-date insights on project changes.



- Allows user to create change request from Project details page.



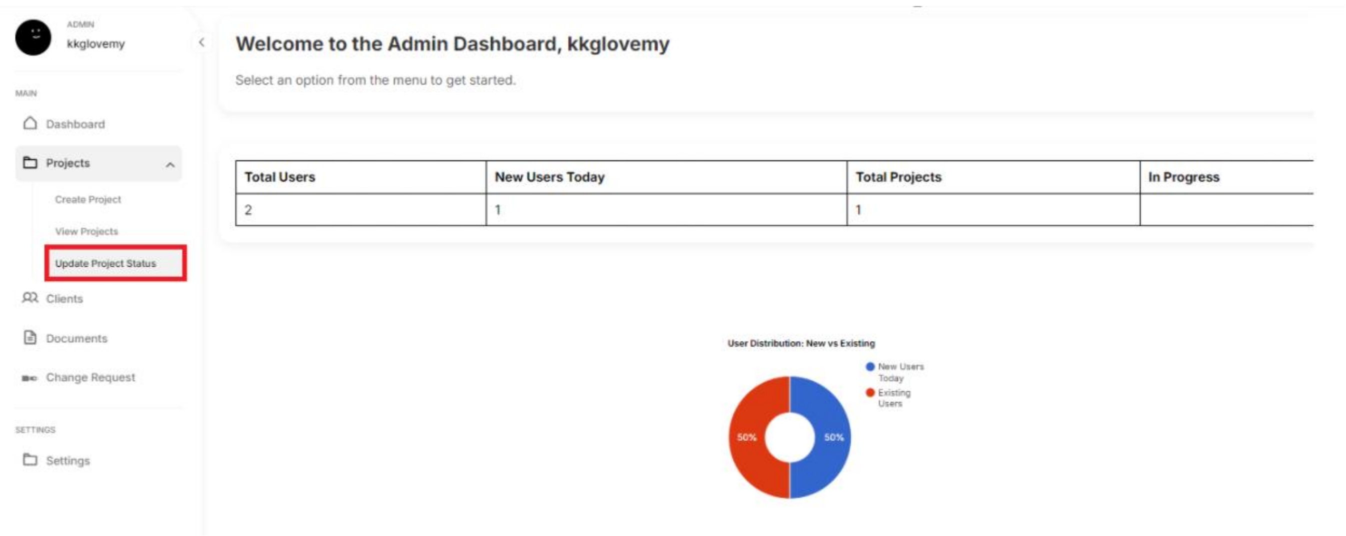
Project name is auto-populated and application doesn‘t allow selection of any other project

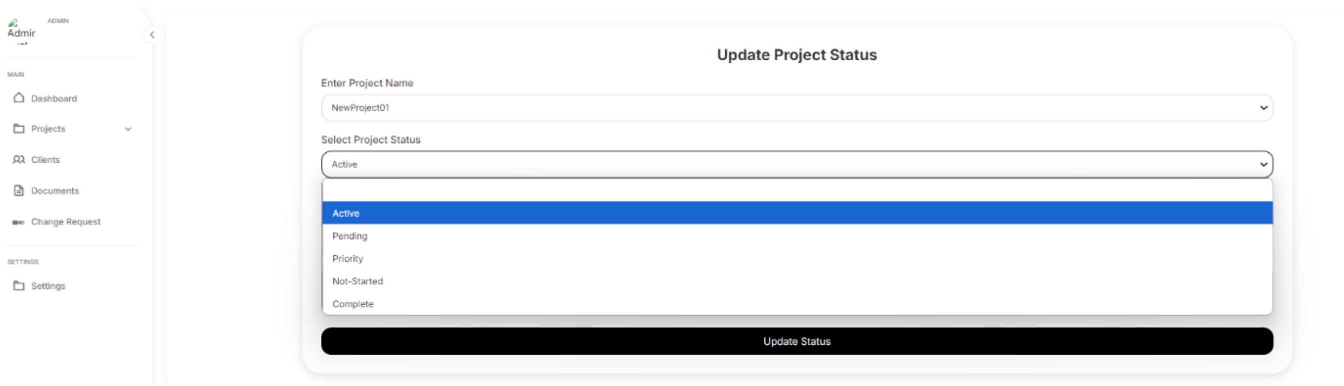


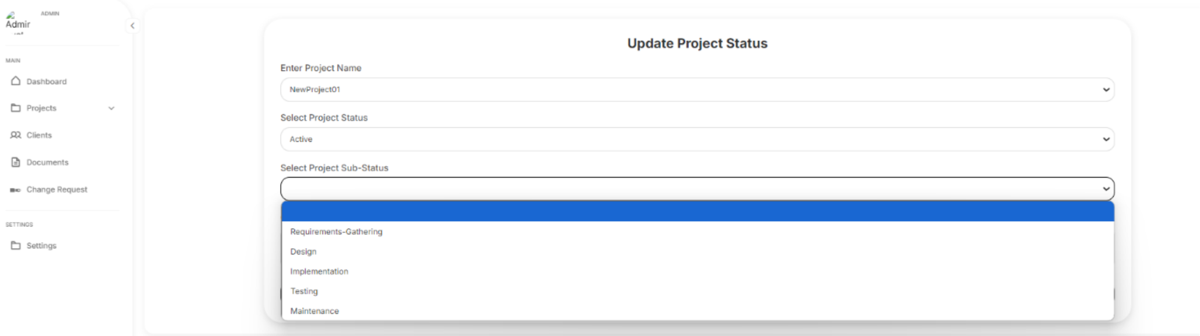
Upon submission again email is triggered to admin and user.

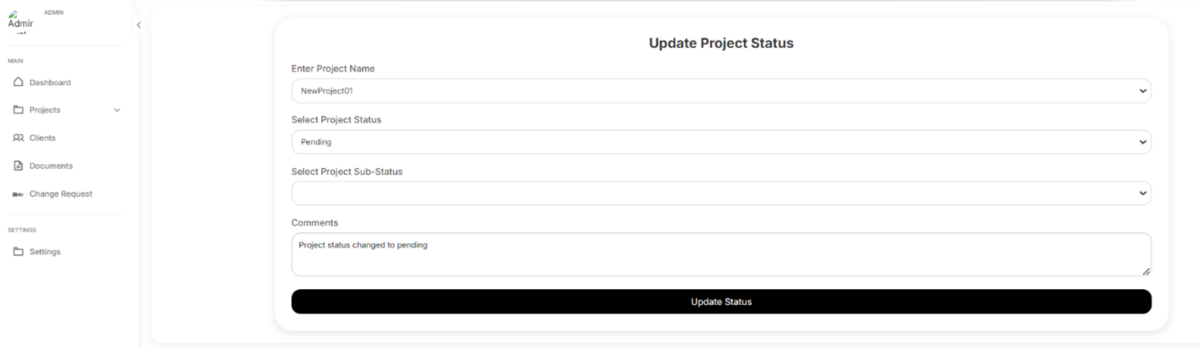
4.5 Update Project Status (Pavan):

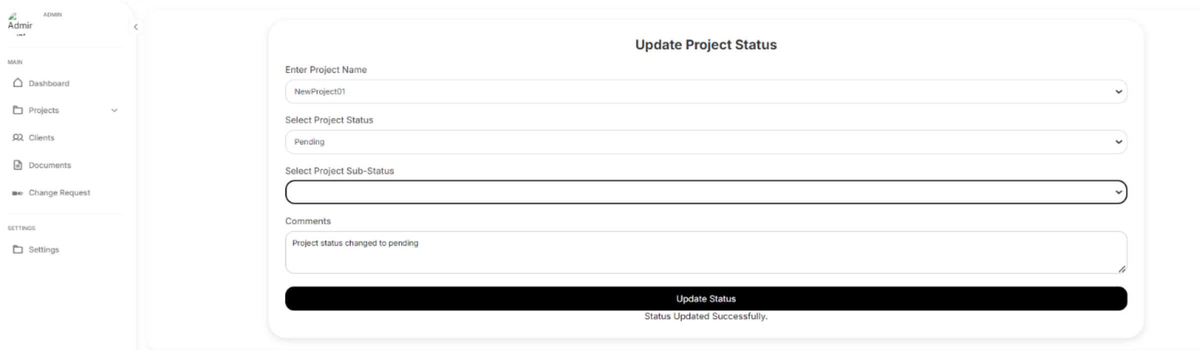
- Enables updating the status of projects to reflect their current stage in the categories - Active(with sub-status: Requirements Gathering, Design, Implementation, Testing, Maintenance), Pending, Priority, Not started along with comments.



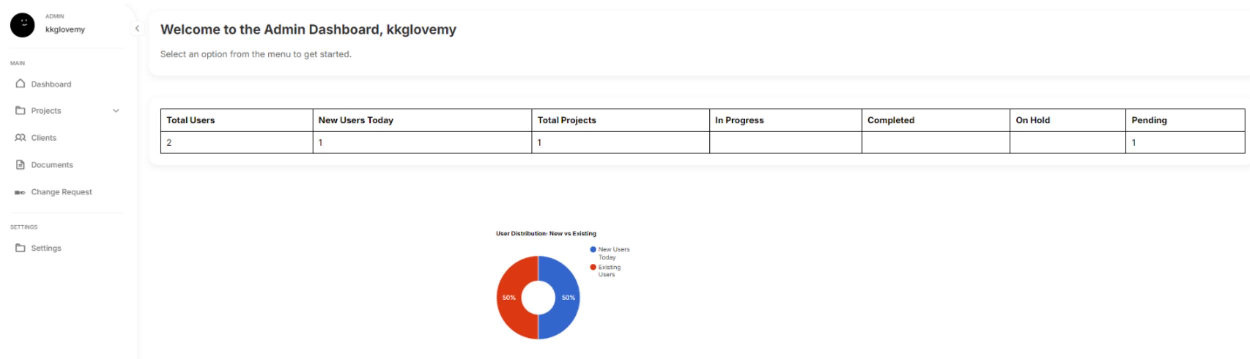








- Enhances user experience by providing relevant information at a glance.
- The status (and its sub-status) is dynamically updated on dashboard in project statistics and project details page.



4.6 User Settings:

This feature is designed for the user to modify their account details on the Client side, for:

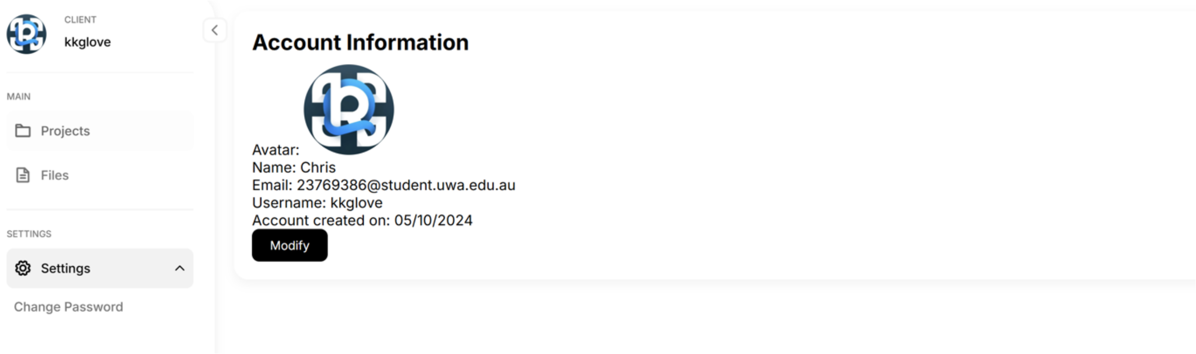
- update for personalised avatar picture
- change email address

To do this, you will need to:
1). login to Client Portal as a user using the testing account:

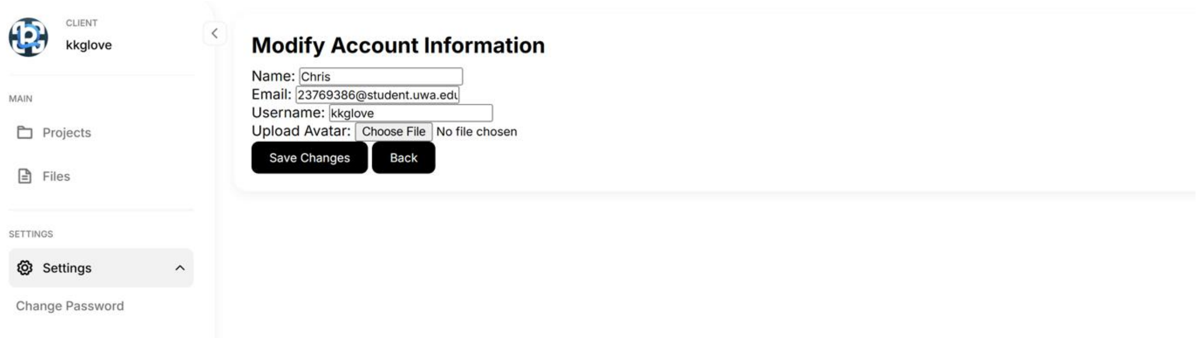
Username: testing@gmail.com

Password: password1234

2). Click on “**Settings**” in the side bar:



3). Click on “Modify” and update the details: email address update, upload profile picture etc. “Save Changes” to update the features.



5. Support:

If you encounter any issues while using the Client Portal for website development or need additional assistance, you can find support through the following resources:

5.1 PocketBase Support and Documentation:

- Official PocketBase Documentation: https://pocketbase.io/docs
- This comprehensive guide includes:

    - Setting up and managing PocketBase instances.
    - Managing collections, users, and roles.
    - Troubleshooting common issues related to PocketBase.

PocketBase GitHub Repository:

- GitHub Repository: https://github.com/pocketbase/pocketbase
- Access source code, report bugs, and review ongoing updates.

Community Support:

- You can also ask questions or seek help in the **PocketBase community** by joining the official **Discord server** or checking out community forums:
    - Discord: https://discord.com/invite/8TnN92pbFB
    - Forums: https://github.com/pocketbase/pocketbase/discussions

5.2 : Flask Documentation:

If you need help with the Flask framework used for the backend of the application, refer to the official **Flask Documentation**:

- Flask Documentation: https://flask.palletsprojects.com/en/latest/
- This includes:
    - Guides on setting up Flask, routing, and middleware.
    - FAQs and troubleshooting tips.

If you have any other questions or run into problems that aren't covered by the resources above, don't hesitate to reach out to one of us on the project team and we'll do our best to assist you.