

# **WHITE VENUS ANALYTICS**

**Client: Longworth Dental Boutique**

## **Final Report**

COIS 4000Y - Fall 2022

Group Members:

Punyaja Mishra, Sidak Singh Sra, Michael Adebayo,  
Chukwudebem Ilo

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# Complete Requirements

## Project Drivers

### Purpose of the Project

Every business requires reviewing their data and making decisions for their business based on this data. Solely making decisions based on past data does not produce efficient data. An efficient decision for the business can be made when the business can see what's happening in real-time in context with the historical data. The purpose of this project is developing a Data Analysis Web Application that allows the Business owners to access a comprehensive overview of the company performance through data visualization tools. One platform to be able to track all their patients, to track their service providers' success, and to make informed decisions and come up with solutions based on the analytical visualizations of various condensed reports based on client's requests.. This will improve the efficiency and results of the decision making process for the business while also keeping their finances in check.

### Goals of the Business Problem

Longworth Dental Boutique hired WHITE VENUS ANALYTICS to build a Web Application that aggregates most of their business metrics in one place and provides the trends and patterns by just one click. WHITE VENUS ANALYTICS did a feasibility study to explore all the possible designs that can improve the business' Data Review Weekly Meetings. The purpose fulfillment for the below goals is measured on a scale of 5 based on factors such as the importance of implementation, overall impact, and other relevant metrics..

**Purpose:** To build a web application dashboard that prints business' data

**Advantage:** To store all business data used for decision making in one place

**Measurement: 5**

**Purpose:** To review the Monthly Revenue reports every week and compare them with previous month's report and the last year's current month's report

**Advantage:** To compare the trend in the business

**Measurement: 5**

**Purpose:** To allow all the Business Team members with different user type access level. The Service Providers of the Clinic (Dentists and Hygienists) will be able to Review their individual Performance Metrics. The Receptionists will access and update all the forms and applications that are required to be sent to the patients. The General Managers and HR of the clinic will use the Generates new client & patient information to build providers schedules. The Marketing Department can import the Reviews and Feedbacks from the Clients. The Technicians and Developers will be able to import source codes, upload new releases and maintain the current version of the platform along with fixing and testing any and all identified bugs.

**Advantage:** To protect data and accessibility within the business hierarchy

**Measurement:** 4

**Purpose:** To build firm and non-negotiable firewall security

**Advantage:** To protect clinic's private data and finances details

**Measurement:** 5

Since, the goal and scope of the project is very large, all the features can not be implemented by WHITE VENUS ANALYTICS within the 7-8 months period. Therefore, we will be focusing on a slightly smaller scope of Business Owners, Dentists, Hygienists and Receptionists. The business goal is susceptible to increase upon success of the initial release of the product.

## Stakeholder Assessment

### Client

Longworth Dental Clinique Boutique is the client that has hired WHITE VENUS ANALYTICS to develop the Web Application Dashboard

### Hands on Users/Customers

The customers of this product will be the Business Owners. Their access and permissions will vary according to their positions. There will be the following types of users:

- *Business Owner/Manager*  
The business owner/Manager can review the Monthly Revenue reports every week along with the previous month's report and the last year's current month's report to compare the trend in the business. They will have the "views" and "performance data and metrics" of all the other Users (service providers).
- *Dentists/Hygienists*  
Dentists and Hygienists will be able to Review their individual Performance Metrics in tabular and graphical charts format.
- *General Managers/HR*  
The General Managers and HR of the clinic will use the Generates new client & patient information along with reviewing the Clinic's review on the online platforms to make informed decisions on schedules and approach to services for the benefit of the clinic.
- *Marketing Staff*  
The Marketing Department can import the Reviews and Feedbacks from the Clients and Upload their marketing tactics, ideas and posters that will be accessible to the entire Marketing Department Staff.
- *Receptionists*  
The Receptionists will update the provider's schedule every day for database purposes. They will also access and update all the forms and applications that are required to be

sent to the patients. They will then be able to send these forms and applications to the clients for them to sign these so it's already dealt with before their visit/appointment.

### **Clinic Patients**

The data depends on the patients coming to the clinic for a certain service. This makes the entire data involved in this project entirely dependent on them, making them an important stakeholder. The data depends on the Clinic Patients' frequency of visitation, services they are coming to the clinic for, their preference for any particular doctor/hygienist, and/or their feedback and reviews.

### **Other Stakeholders**

Developers and Technicians will work in a team to create and deliver the system for a narrowed down scope by March 2023. They will import source codes, upload new releases and maintain the current version of the platform along with fixing and testing any and all identified bugs.

## Priorities Assigned to the Users

### a. Key Users

#### *Managers:*

The Managers own the most percentage of the business and are actively involved in the decision making process of the business. They will have the most priority and permissions across the Dashboard. They will have access to all types of data and user permissions.

### b. Secondary Users:

#### *Dentists/ Hygienists:*

Dentists and Hygienists are the center of the Business' Revenue. They will have permissions to be able to see Data and Trends related only to the service offered by them individually. This will allow them to evaluate their patients, services and revenues generated by them.

#### *General Managers/HR*

The General Managers and HR of the clinic will use the Generates new client & patient information to build providers schedules.

#### *Receptionists*

The Receptionist is a secondary user that updates the providers' everyday schedules on the system to update the data on the database. They will access and update all the forms and applications that are required to be sent to the patients.

### c. Unimportant Users:

#### *Marketing:*

Marketing is the third type of user. Their permissions vary greatly compared to the other types of priorities as their target data type is very different.

# Project Constraints

## Solution Constraints

- ❖ The Web Application Dashboard being developed should be available on desktops as well as both iOS and Android devices later
- ❖ HTML, CSS, and PHP have to be fully in effect and efficiently written for the project to have its platform ready to use
- ❖ The database that will be implemented later on the project timeline should have optimized queries to have fast and efficient performance
- ❖ The use of existing open-source applications or databases to develop the project may have capacity limitations or hinder the speed of the system.
- ❖ Using minified Javascript and module bundling as language for shorter code that can be parsed faster

## Schedule Constraint

- ❖ The final product with narrowed down scope from the full product scope has to be developed by March 2023
- ❖ Each Sprint has a 2-week period for completing all the assigned tasks to the developers
- ❖ The previous sprint must be fully completed to avoid encountering with any delays for the next sprint

## Budget Constraint

- ❖ As of the beginning of the project we have no budget constraints regarding the software and tools as all these software and tools are existing open-source and free on the market
- ❖ As the project leaves our hands the client requires to set up a database and choose to move the application to a different server which may require additional financial and budgetary concerns on the client's side
- ❖ Financial constraint produced by the labor costs and future web application & database maintenance costs

## Legal and Ethical Constraint

- ❖ All patient details are confidential, and can all be seen only by the Manager
- ❖ Dentists and Hygienists have access to their individual profiles which shows them their data and trends about the appointments and revenue earned by them

## Relevant Facts and Assumptions

- ❖ The Product will visualize the data metrics following the Data Visualization Principles
- ❖ The Entire Product Scope is very large to be able to completed within 7 months of WHITE VENUS ANALYTICS' "hired" period, therefore the requirements and scopes have been narrowed down to fit within this period
- ❖ Data and Math being used for developing performance metrics are provided by the data owners
- ❖ There will be weekly meetings and communications within the executive team and the dentists/hygienists to update any performance metric tracking systems and procedures

- ❖ WHITE VENUS ANALYTICS do not own the statistical data and holds no responsibility over it
- ❖ Open Source Software and Tools are being used with their existing limitations as well as capabilities
- ❖ WHITE VENUS ANALYTICS is not responsible for transferring of application on new database and server that client purchases and sets up after the “hired” period
- ❖ WHITE VENUS ANALYTICS will be responsible for sharing all the source codes, user manual and technical documentations to the client at the end of the “hired” period

# Naming Conventions and Terminology

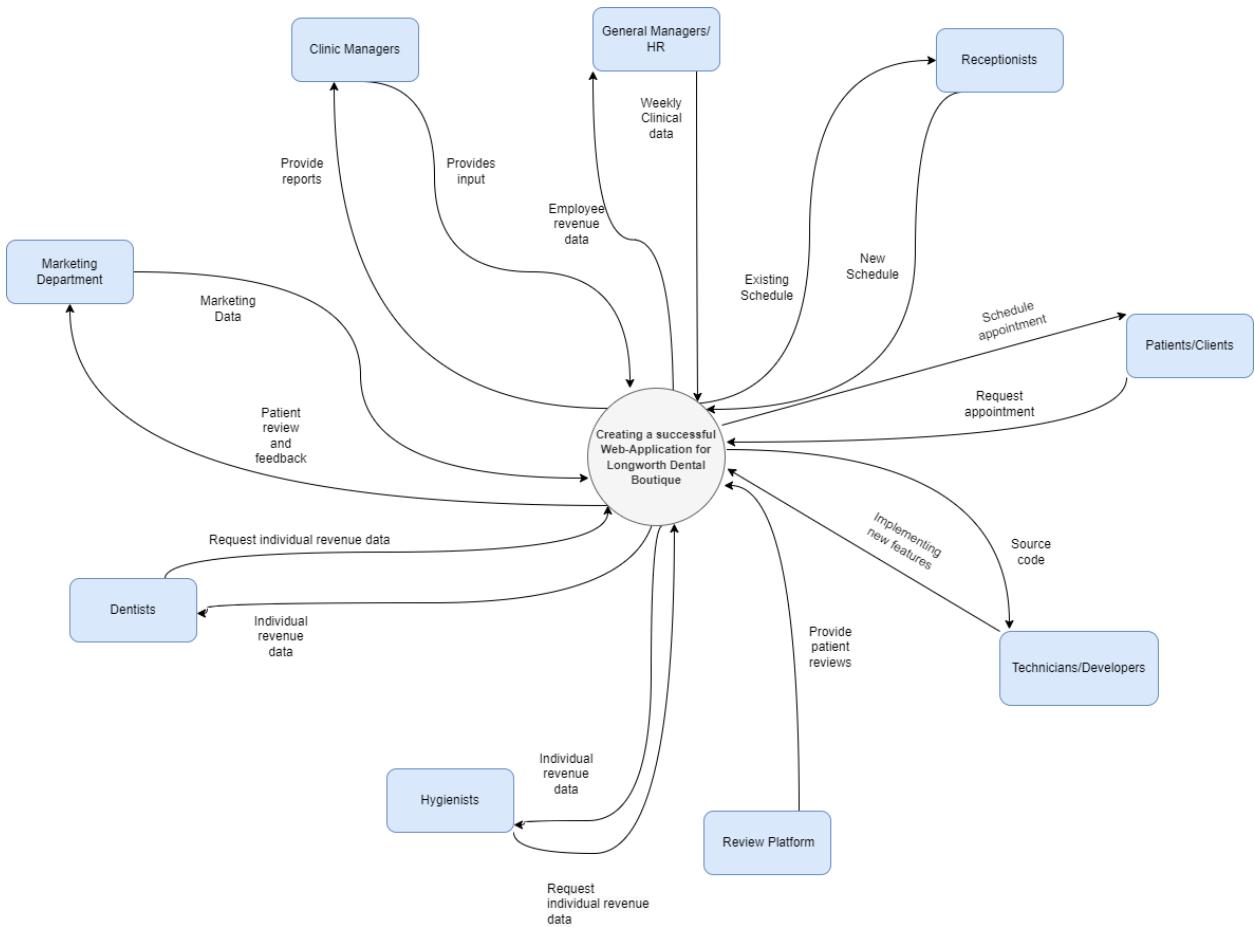
Terminology	Definition
Access Level	Different user type has different authorization to read/create/delete/edit data
Android Devices	Devices with Android Operating Systems
Atlassian	A development and collaborations software that offers tools and practices to software developers, project managers and other software development teams to organize, collaborate and complete work together
Business	Longworth Dental Boutique
Business Owner/ Manager	The staff of the Business that owns the most share of the business and therefore has the most User Permissions across the platform
Business Metrics	The data generated by the business either by their services, shares and investors
Client	Longworth Dental Boutique
Client/Patients	The patients coming to the Longworth Dental Boutique for treatments
Clinic	Longworth Dental Boutique
Condensed Reports	Reports generated with Key Performance Indicators and Business Revenue data that are useful to make informed decisions by the business
CSS	Cascading Style Sheets - The language used to format and design web pages of the application
Current Month's Report	Report generated from data of the current month
Data Analysis	Process of inspecting, cleansing, transforming and modeling data with goal of extracting useful information
Data Review Weekly Meetings	Weekly Meetings within the Decision Making Team of the Business with the agenda of Reviewing Business Data and Performance

Data Visualization Principles	Rules and regulations followed when implementing data visualization to produce most efficient visualization of data
Database	Organized collection of data stored and accessed organically
Decision-making process	Cognitive Process resulting in selection of actions and tasks to improve performance
Dentists	Licensed Doctors of Teeth providing medical services to the patients
Executive Team	Team of employees involved in important decision-making process of the business
Forms and Applications	Documentations required to be filled by every new and/or old patient
General Managers/HR	Human Resources Staff and General Manager Staff responsible for Schedule making and HR responsibilities
Review Platform	Platform where users can put reviews and feedback about a certain business. This platform provides useful information to new prospective users of business
Hands on Users/Customers	Users that will be using the built-product
“Hired” Period	The time period that the developers and the software company have been hired for building the product. This case 7-8 months
HTML	Hypertext Markup Language - The standardized system used for to design the page framework that will be displayed on the web browser
Hygienists	Licensed Dental Professional that examine patients for signs for oral diseases and educate patients of their oral health
Individual Performance Metrics	Performance Metrics only associated to an individual user
iOS devices	Apple Devices with their device Operating System
Labor Costs	Cost paid as salary to the labor hired by the company/business
Last Year’s Current Month’s Report	If current month = October 2022 then Last Year’s Current Month = October 2021
Maintenance Costs	Money required to maintain a platform

Marketing Staff/ Marketing Department	Staff responsible for marketing portion of the business
Monthly Revenue Reports	Reports generated by the Revenue costs of the month
Narrowed down Scope	Scope to be squeezed in the current ongoing release
Open-source Applications or database	Free and ready-to-use applications and softwares readily available online
Password	The password set up by the individual users of the product to log into the dashboard
PHP	General Purpose Scripting Language used for web development
Platform	In this case - Web Application being developed
Previous Month's Report	If current month = October 2022 then Previous Month = September 2022. Report generated from data of the previous month
Project Timeline	September 2022 - April 2023
Receptionists	The staff handling updating provider schedules, incoming patients and their files and data
Reviews and Feedbacks	Comments from the users and customers of the business that can be used to improve the business
Requirements	Expected Features of the developing product
Scope/ Scope of the Work	Defined features and functions of a product
Service Providers of the Clinic	Dentists and Hygienists
Sprint	2 week period of development and testing of certain chosen products in Agile Project Management Process
Stakeholder	Members or groups who directly affect or are affected by the product
SQL	The language used for managing data held in the Database

Technicians /Developers	The software developers responsible for maintaining and developing the software product
Username/Email address	The work email of the individual business users of the product that acts as username to log into the dashboard
WHITE VENUS ANALYTICS	Us. The developers hired to build this product
Web Application	Application Software that runs in a web browser and users can work and edit data on the platform

# Scope of the Work



# Business Data Model

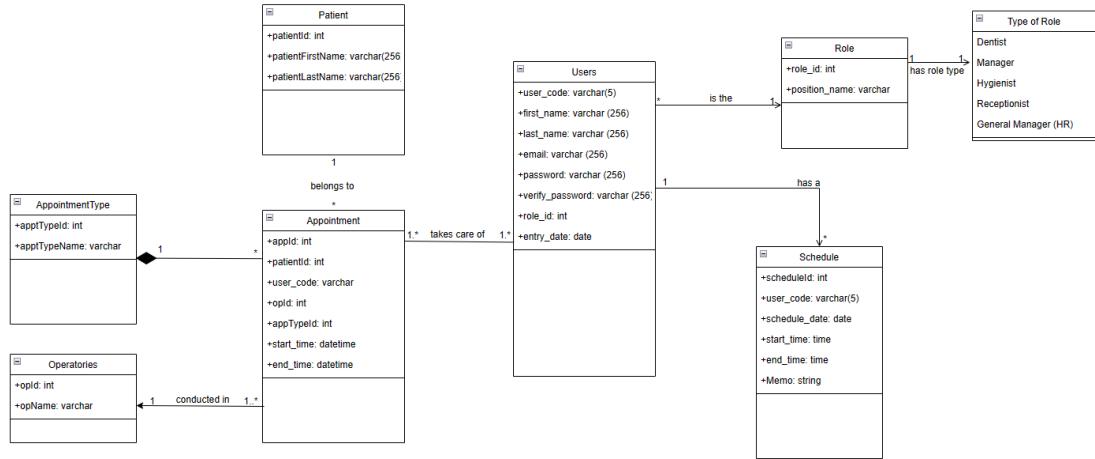


Fig 2: Business Data Model

## Business Events and their Inputs/Outputs

Business Event	Input/Output and Business Use Case
Clinic Managers access and review the Monthly Data, Previous Month's Data and Last Year's Current Month's Data in graphical visualization and tabular form every week.	<i>Output</i> Monthly, Previous Month, Last-year-current-month Report
Clinic Manager uploads revenue and appointment data in csv format at the start of every week	<i>Input</i> Revenue and Appointment Data
Clinic Managers make notes, informed decisions and tactics to improve their performance using the metrics	<i>Input</i> Feedback
Clients and Patients receive the forms and applications	<i>Output</i> Forms and Application
Clients and Patients submit completed documents	<i>Input</i> Forms and Application
Dentists review their individual performance metrics	<i>Output</i> Monthly, Previous Month, Last-year-current-month Report

Dentists make notes and tactics to improve their performance	<i>Input</i> Feedback
General Managers/Human Resource Staff Build Service Providers Schedule	<i>Output</i> Service Provider Schedule
Review Platform provides Reviews and Feedbacks Information	<i>Input</i> Client Reviews
Hygienists review their individual performance metrics	<i>Output</i> Monthly, Previous Month, Last-year-current-month Report
Hygienists make notes and tactics to improve their performance	<i>Input</i> Feedback
Marketing Staff import the clients/patients' reviews and feedbacks to make informed decisions	<i>Output</i> Client Reviews
Marketing Staff upload marketing tactics, ideas and posters	<i>Input</i> Marketing Data

Receptionists updates Providers' Schedules every day	<i>Input</i> Provider Schedule Data
Receptionists send forms and applications to Clients to fill and send back	<i>Output</i> Forms and Application
Receptionists access and edit the forms and applications	<i>Output</i> Forms and Application
Technicians and developers import source codes	<i>Output</i> Source Codes
Technicians and Developers update and upload new releases	<i>Input</i> New Software Release
Technicians and Developers can Maintain the platform, fix and test the bugs	<i>Input</i> Defect Fix Package

# **Risk Assessment**

The probability of a risk can be low, moderate, or high. The effect of a risk can be insignificant, tolerable, serious, or catastrophic.

**Risk:** Project has a high scope that might not get completed if requirements had not been reduced

**Probability:** Moderate

**Effect:** Moderate

**Risk:** Teaching the staff how to use and manage the system may be a challenging task.

**Probability:** Moderate

**Effect:** Tolerable

**Risk:** User Permissions are not implemented properly and users from a different department changes values that they should not have access to.

**Probability:** Moderate

**Effect:** Serious

**Risk:** Data related to the business/customer is released without authorization.

**Probability:** Low

**Effect:** Catastrophic

**Risk:** Data gathered may be too little for it to be useful.

**Probability:** Moderate

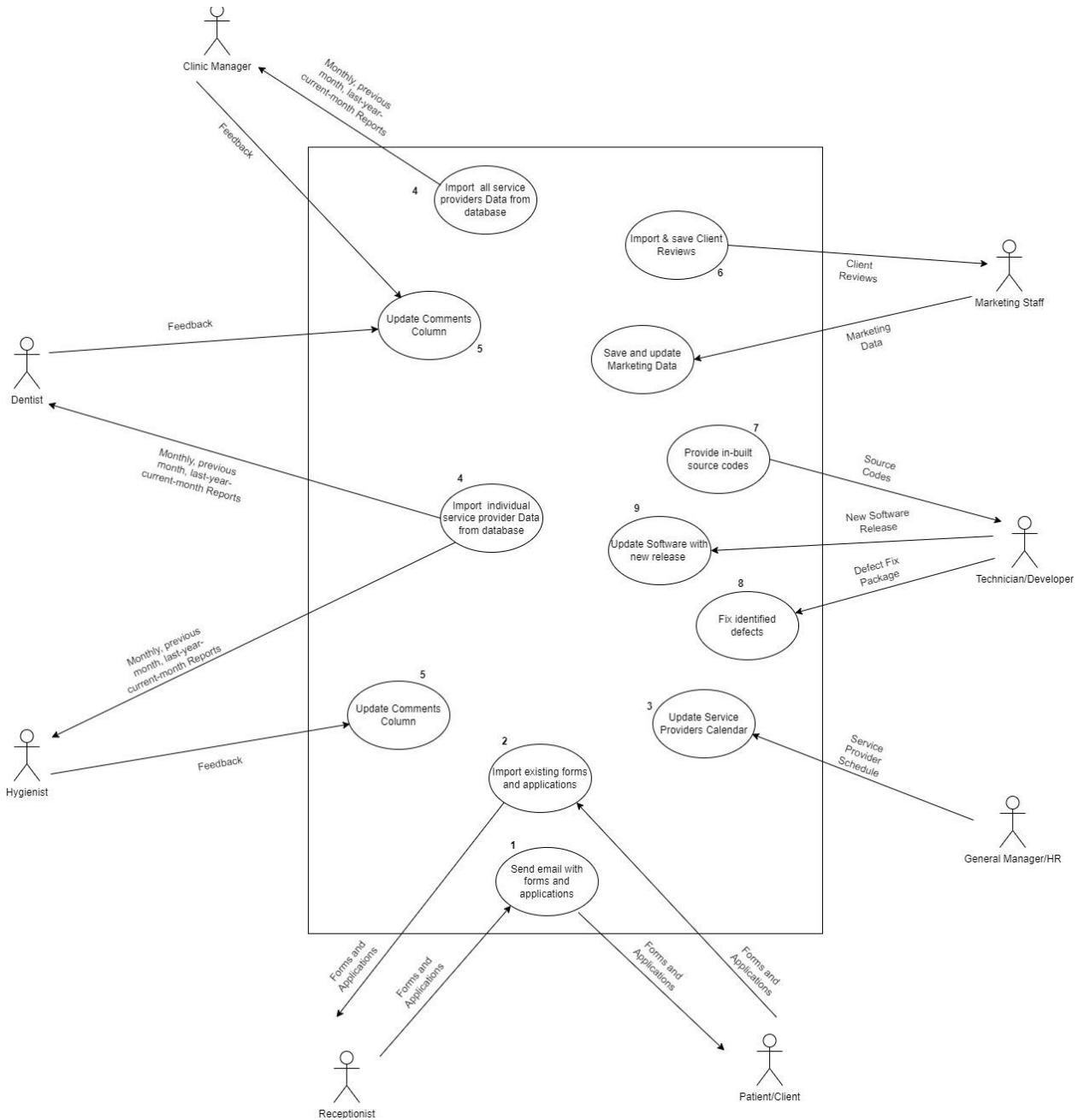
**Effect:** Serious

**Risk:** The data that is being displayed is not easily understood by the key and secondary users.

**Probability:** Moderate

**Effect:** Serious

# Product Use Case Diagram



## Product Use Case Scenarios

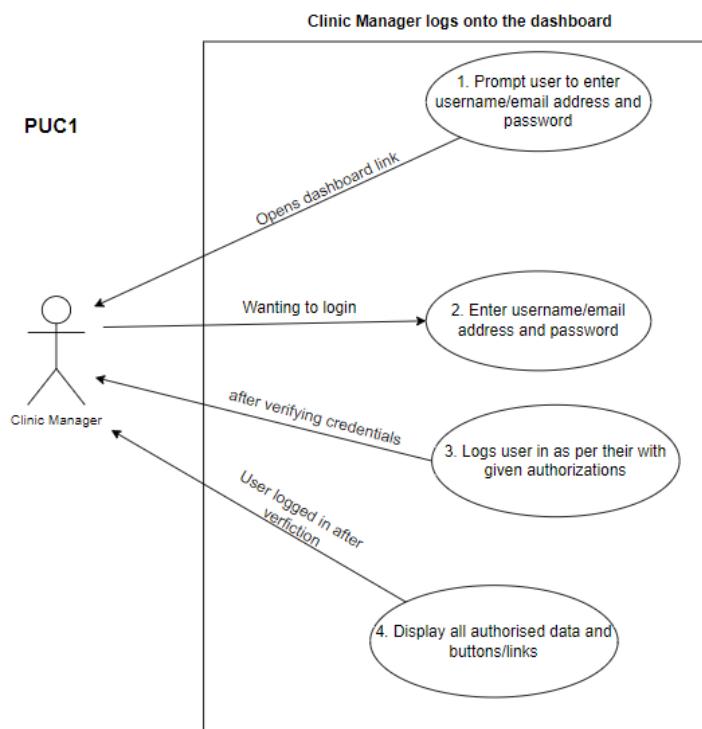
- Product Use Case Name:** Clinic Manager logs onto the dashboard  
**Trigger:** Clinic Manager opening the web application  
**Preconditions:** Clinic Manager must have the dashboard link, clinic manager must have access to the dashboard

**Interested Stakeholders:** Clinic Manager, Dentists, Hygienists

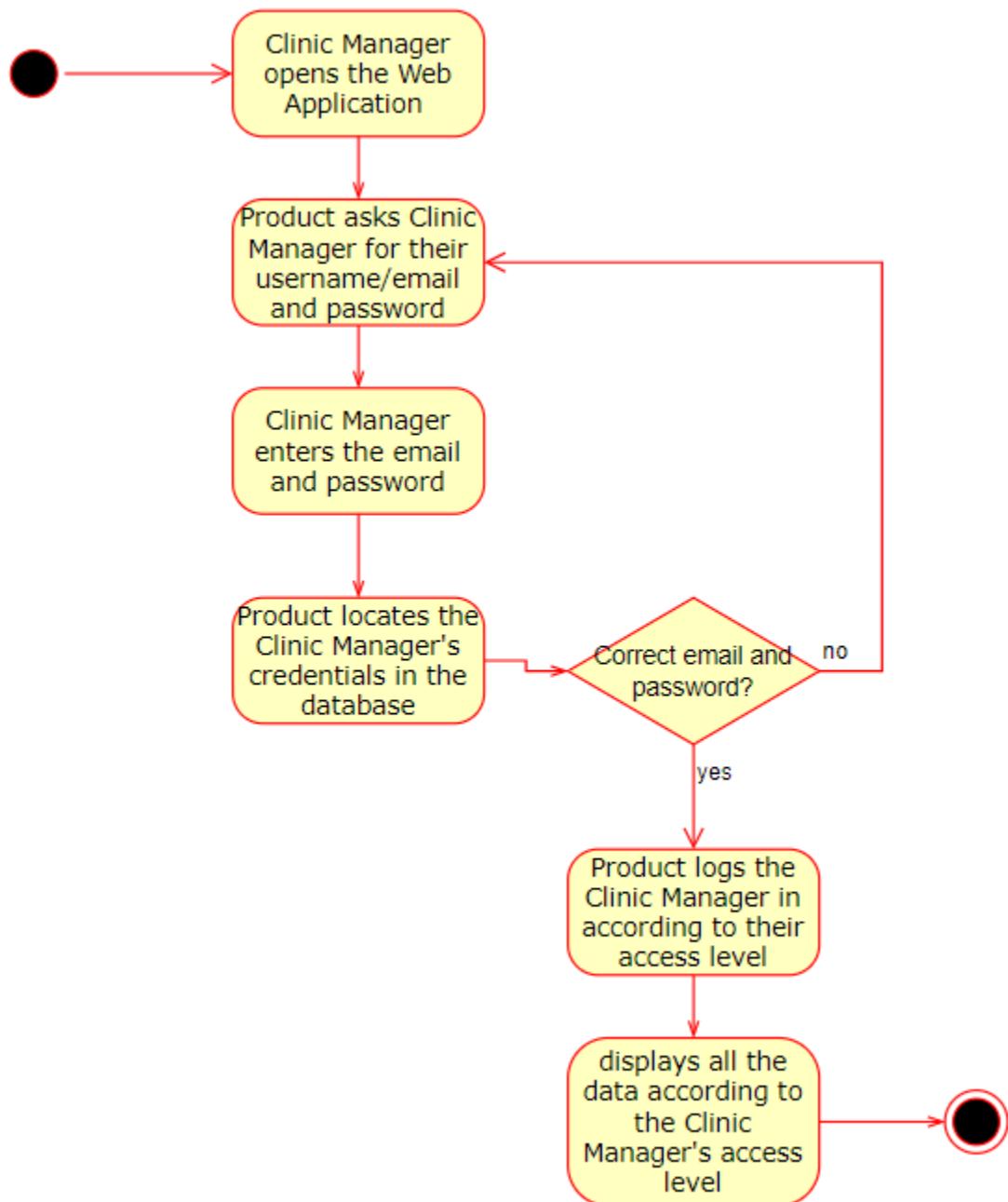
**Actor:** Clinic Manager

- a. The product asks clinic manager for their username/email and password
- b. The Clinic Manager supplies both username/email and password and the product locates the clinic manager's credentials in database
- c. The product logs the Clinic Manager in according to their "access level"
- d. The product displays all the data and buttons according to the clinic manager's access level

**Outcome:** Clinic Manager is logged onto the Dashboard and is able to review all the data



Activity Diagram: -



**2. Product Use Case Name:** Clinic Manager reviews an individual service provider's business and service data

**Trigger:** Clinic Manager clicks on an individual service provider's name on the side navigation panel

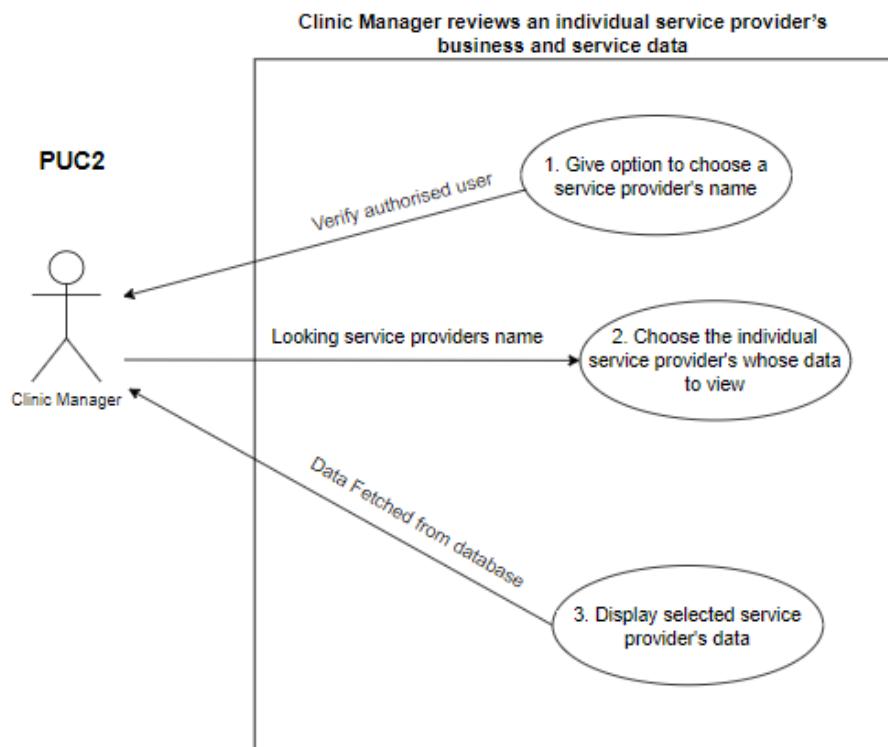
**Preconditions:** Clinic Manager is logged onto the dashboard, Clinic Manager has the manager (highest) level access

**Interested Stakeholders:** Clinic Manager, Dentist, Hygienist

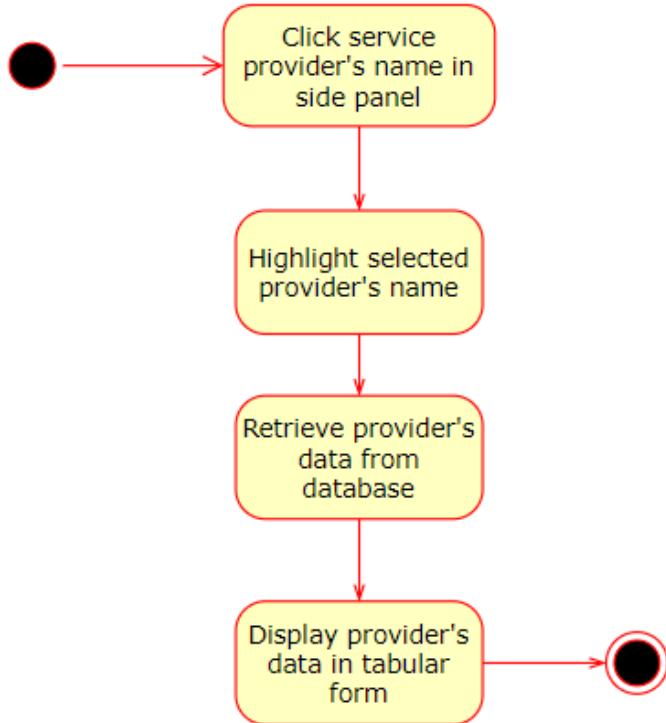
**Actor:** Clinic Manager

- a. Clinic Manager clicks on an individual provider's name on the side navigation panel to look on their data
- b. Product pulls the data of only that particular individual service providers name from the database
- c. The individual service providers name is highlighted on the side navigation panel
- d. Product displays the data of the individual service provider in tabular form

**Outcome:** Clinic Manager is able to review all the data of the individual service provider through their own user account



Activity Diagram: -



**3. Product Use Case Name:** Clinic Manager reviews the Monthly, Previous Month, Last-year-current-month data

**Trigger:** Clinic Manager clicked on the visualization button on the top panel

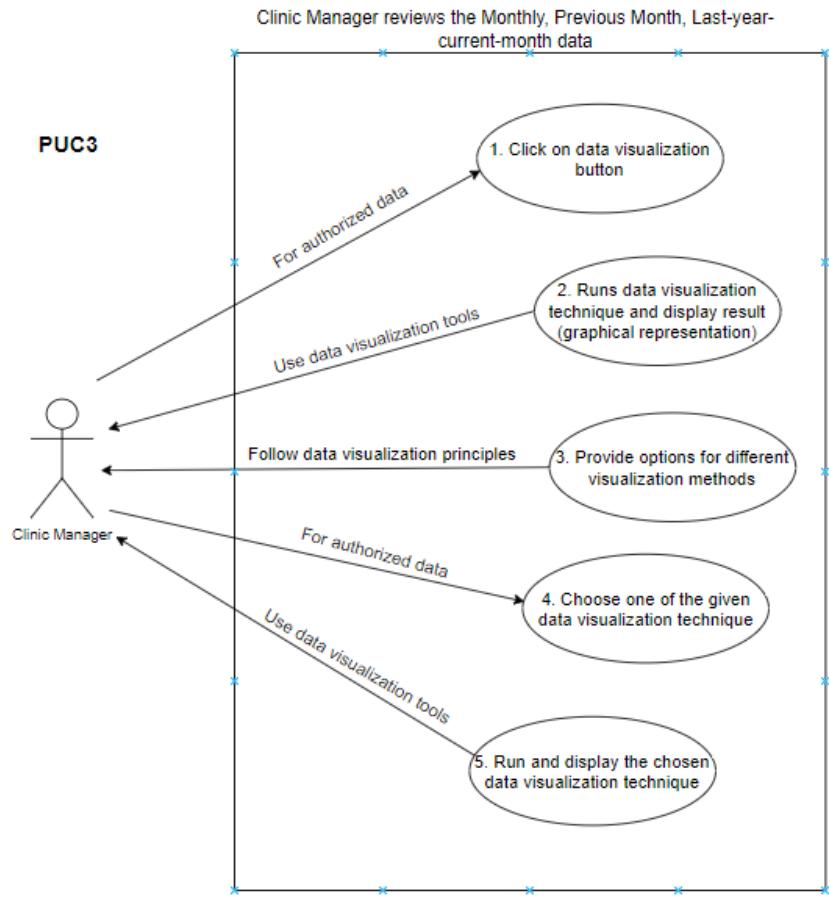
**Preconditions:** Clinic Manager is logged onto the dashboard

**Interested Stakeholders:** Clinic Manager, Dentist, Hygienist

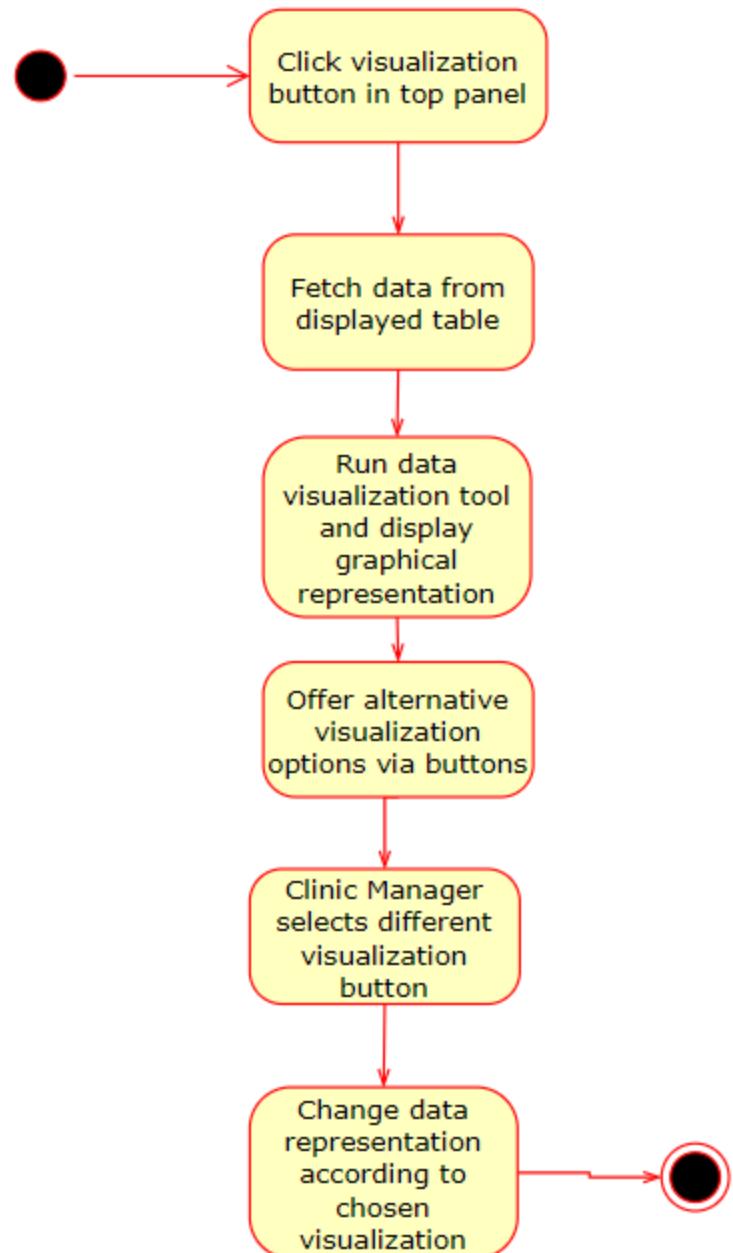
**Actor:** Clinic Manager

- Clinic Manager clicked on the visualization button on the side navigation panel
- The product fetches the data that was being displayed in tabular format
- The product runs the data visualization tool to convert the data table into a data visualization and displays the data as a graphical representation
- The product gives option of other data visualization that would provide the most information for data analysis in forms of buttons
- Clinic Manager clicks on the other data visualization buttons
- The product changes the representation of data according to the chosen data visualization

**Outcome:** Clinic Manager is able to look at data in various graphical format and make informed decisions



Activity Diagram: -



**4. Product Use Case Name:** Clinic Manager makes note and provides feedback

**Trigger:** Clinic Manager reviewed data and wishes to make note and provide feedback, Clinic Manager clicked on Comments column on the main page

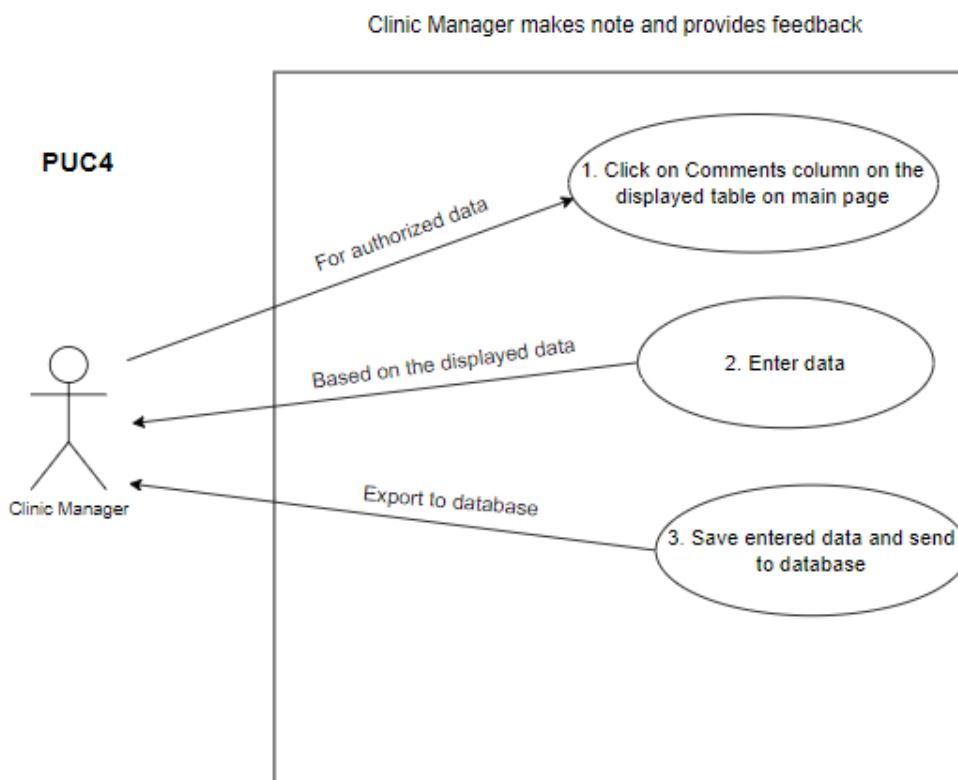
**Preconditions:** Clinic Manager is logged onto the dashboard, Clinic Manager able to review data properly

**Interested Stakeholders:** Clinic Manager, Dentist, Hygienist

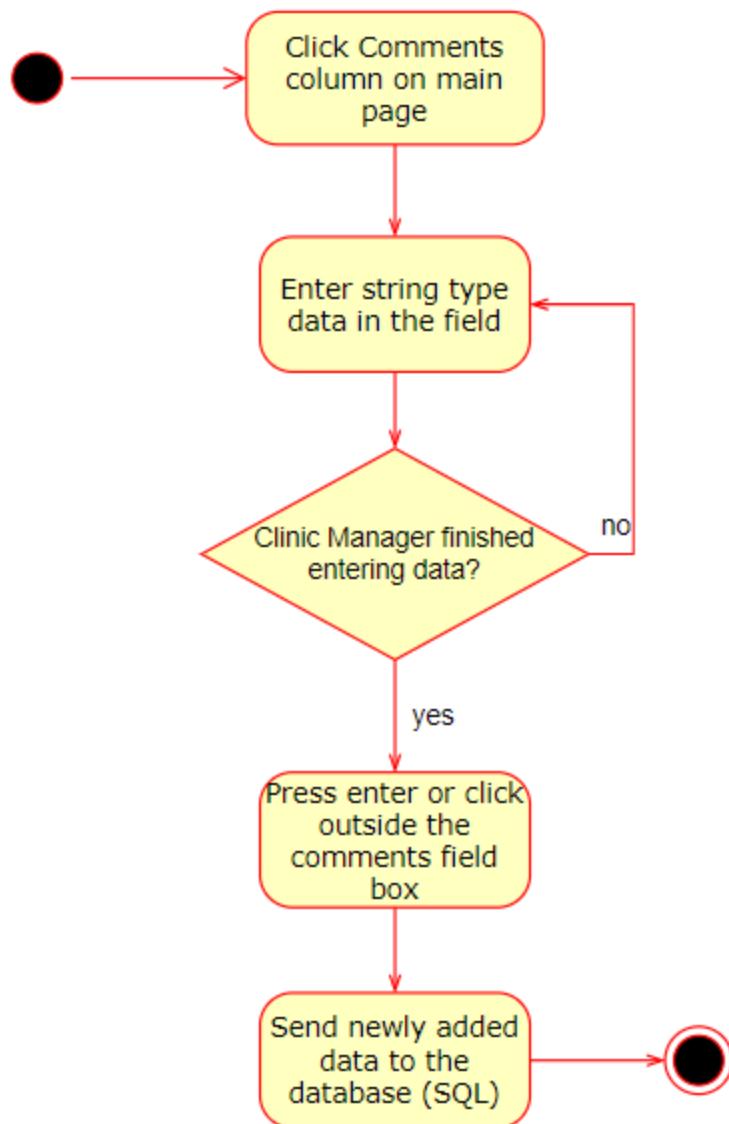
**Actor:** Clinic Manager

- a. Clinic Manager clicked on Comments column on the main page
- b. Product allows the Clinic Manager to enter string type data in the field
- c. Clinic Manager finishes entering data and presses enter or presses out of the comments field box
- d. Product sends this newly added data back to the database (SQL)

**Outcome:** Clinic Manager is able to make notes for an entry and save it globally (in database)



Activity Diagram: -



**5. Product Use Case Name:** Dentist logs into the dashboard

**Trigger:** Dentist opening the web application

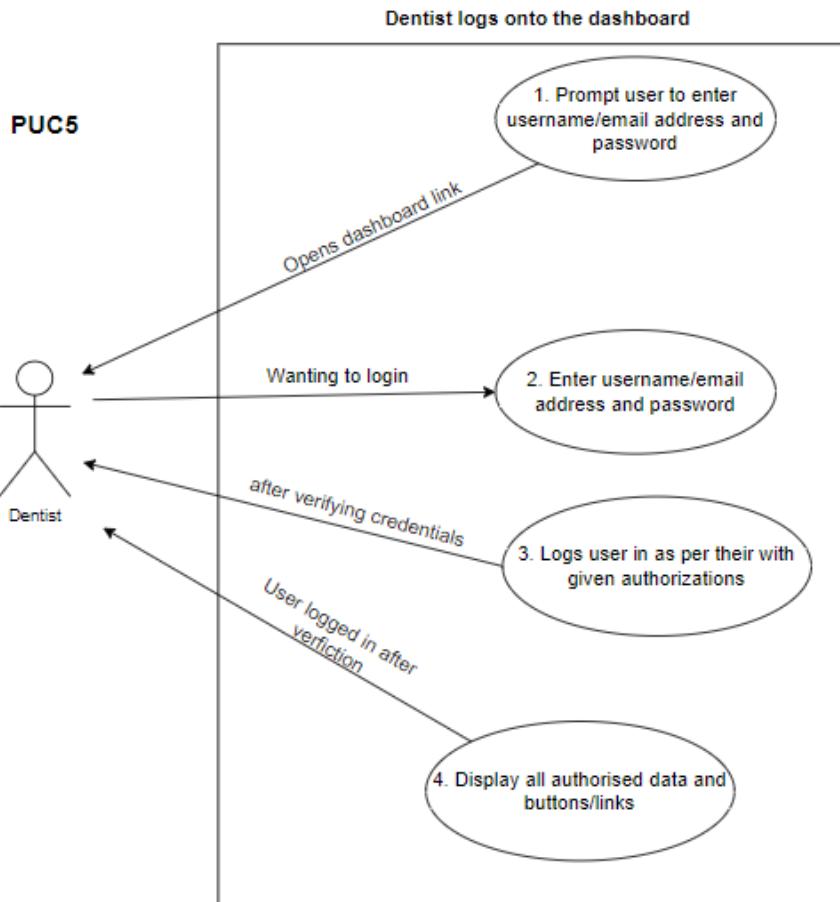
**Preconditions:** Dentist must have the dashboard link, Dentist must have access to the dashboard

**Interested Stakeholders:** Dentists, Clinic Manager

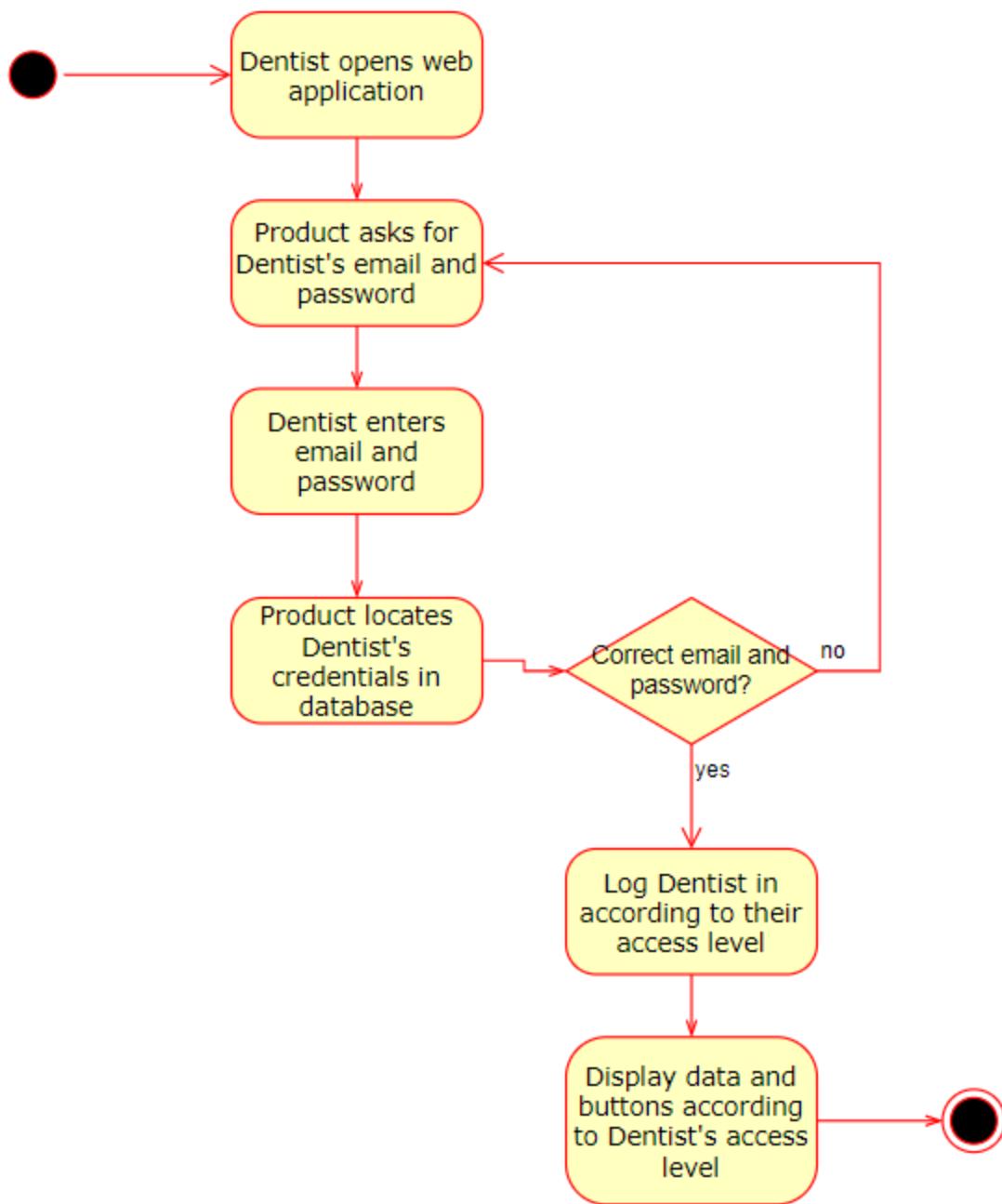
**Actor:** Dentist

- a. The product asks Dentist for their username/email address and password
- b. The Dentist supplies both username/email and password and the product locates the dentist's credentials in database
- c. The product logs the Dentist in according to their "access level"
- d. The product displays all the data and buttons according to the Dentist's access level

**Outcome:** Dentist is logged into the Dashboard and is able to review all their individual data.



Activity Diagram: -



**6. Product Use Case Name:** Dentist reviews the Monthly, Previous Month, Last-year-current-month data

**Trigger:** Dentist clicked on the visualization button on the top panel

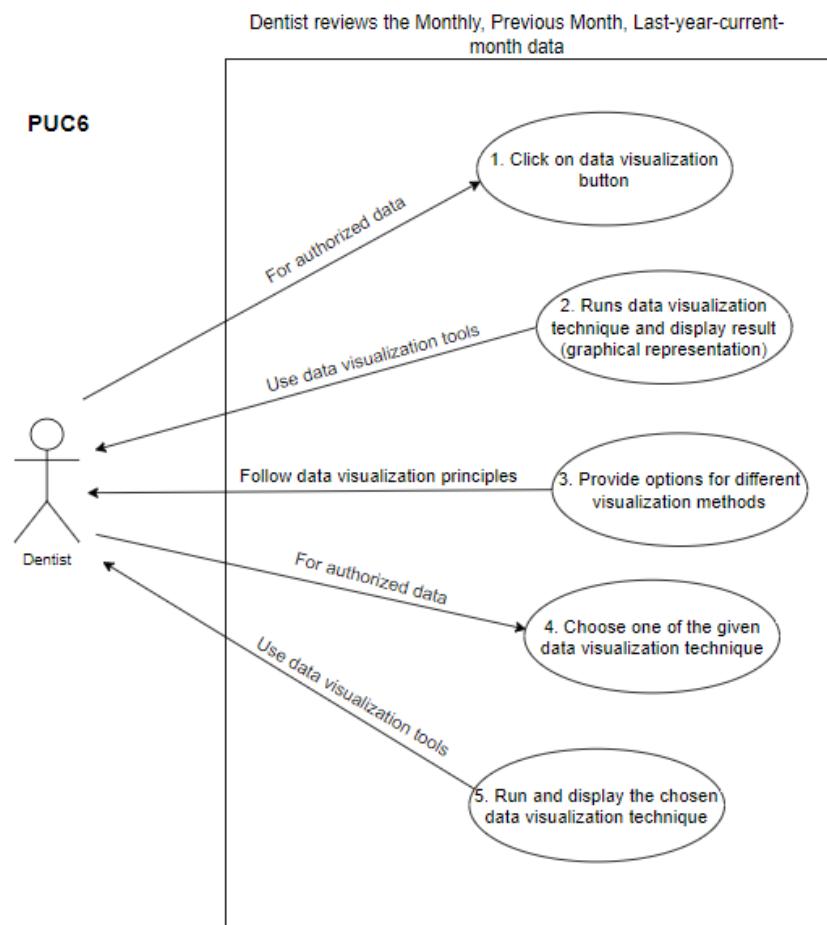
**Preconditions:** Dentist is logged onto the dashboard

**Interested Stakeholders:** Dentists, Clinic Manager

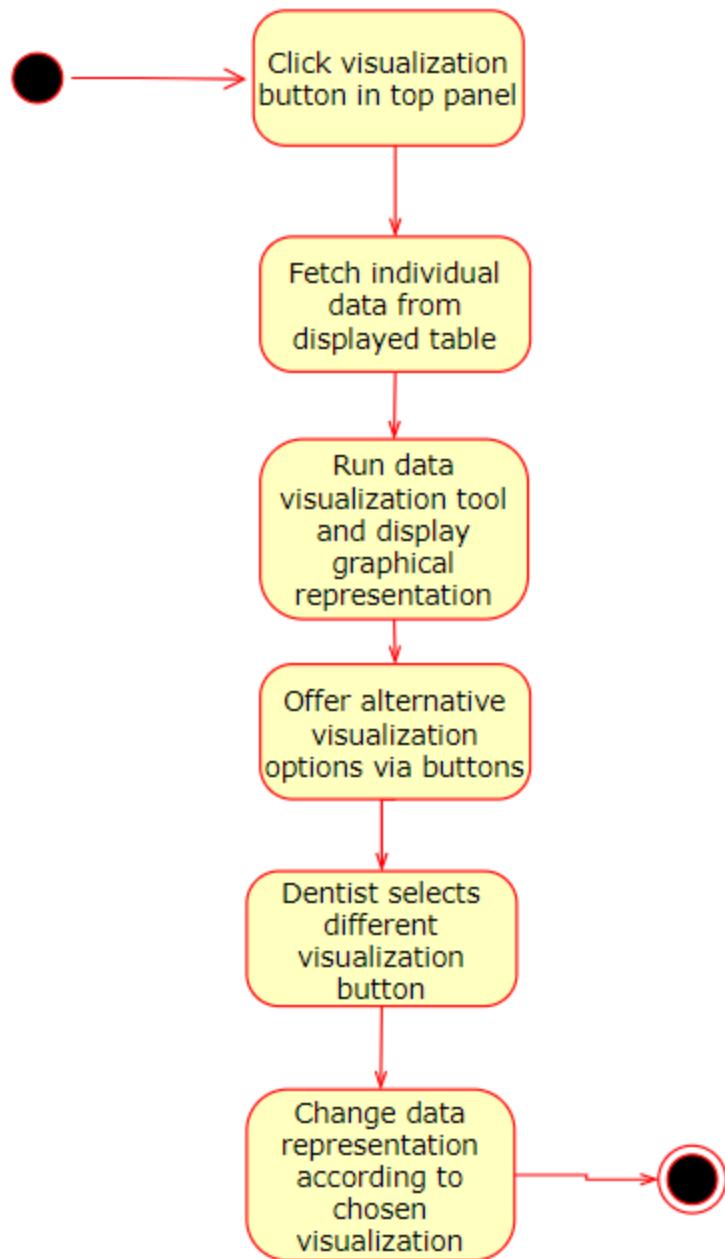
**Actor:** Dentist

- a. Dentist clicked on the visualization button on the side navigation panel
- b. The product fetches the data that was being displayed in tabular format, which is the dentist's individual data in this case
- c. The product runs the data visualization tool to convert the data table into a data visualization and displays the data as a graphical representation
- d. The product gives option of other data visualization that would provide the most information for data analysis in forms of buttons
- e. Dentist clicks on the other data visualization buttons
- f. The product changes the representation of data according to the chosen data visualization

**Outcome:** Dentist is able to look at their data in various graphical format and make informed decisions



Activity Diagram: -



#### 8. Product Use Case Name: Hygienist logs into the dashboard

**Trigger:** Hygienist opening the web application

**Preconditions:** Hygienist must have the dashboard link, Hygienist must have access to the dashboard

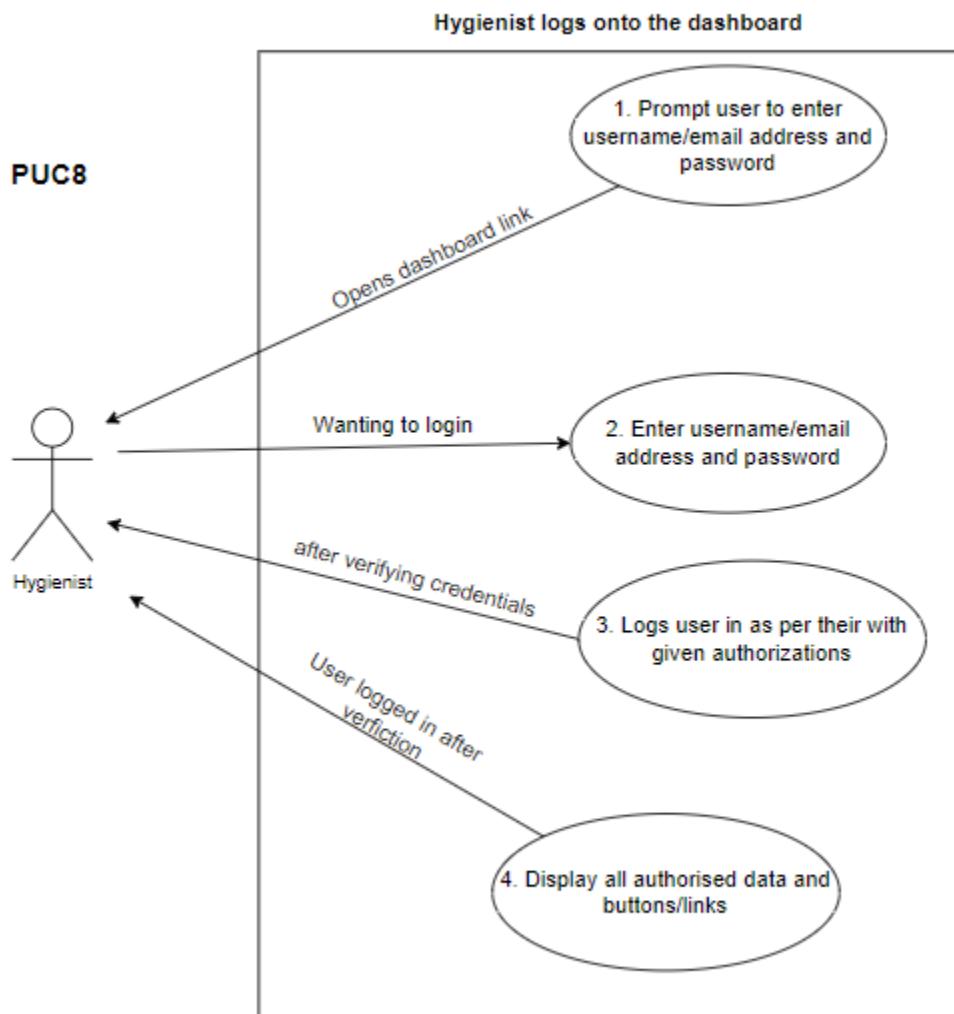
**Interested Stakeholders:** Hygienist , Clinic Manager

**Actor:** Hygienist

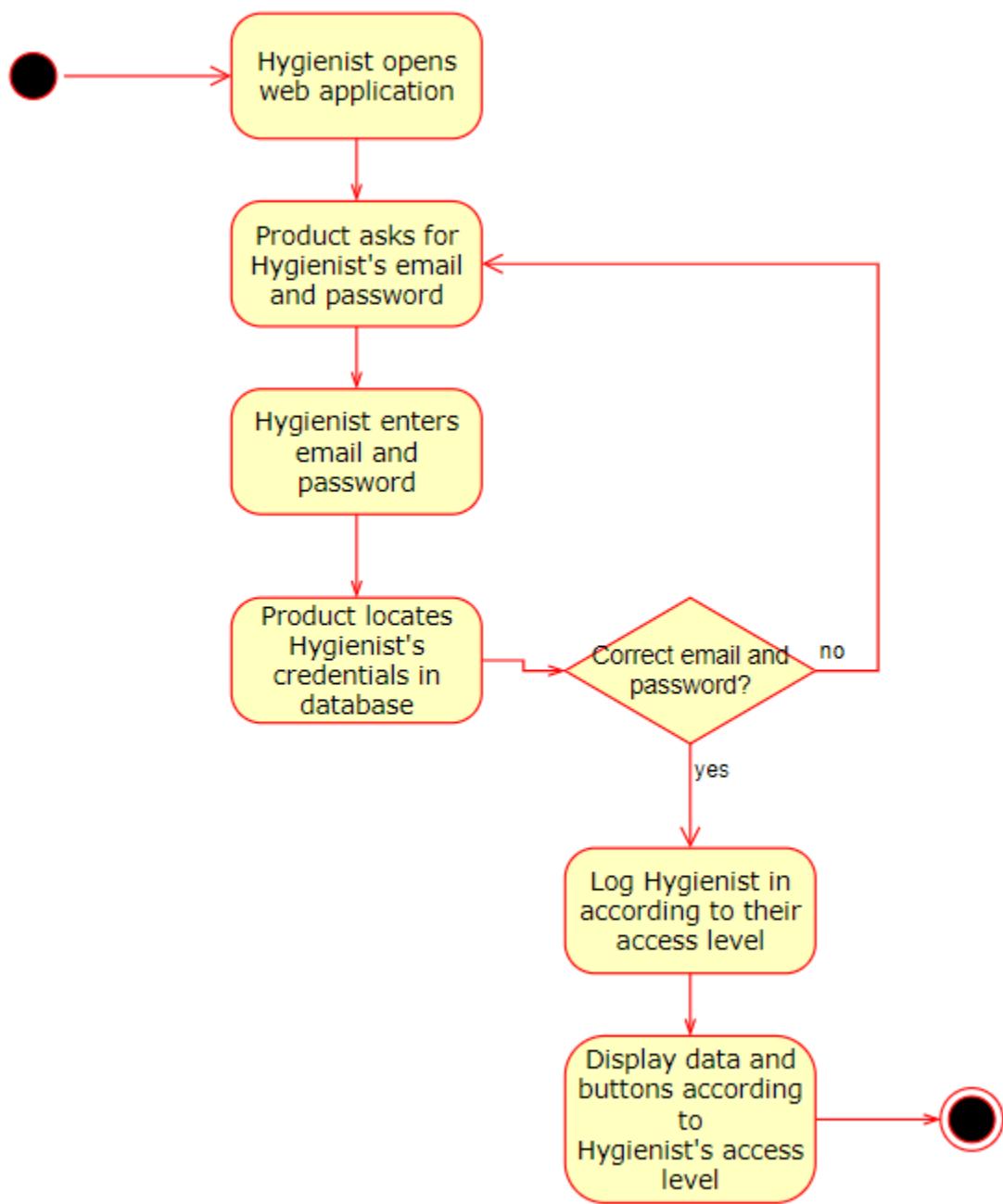
- a. The product asks Hygienist for their username/email address and password

- b. The Hygienist supplies both username/email and password and the product locates the dentist's credentials in database
- c. The product logs the Hygienist in according to their "access level"
- d. The product displays all the data and buttons according to the Hygienist's access level

**Outcome:** Hygienist is logged into the Dashboard and is able to review all their individual data.



Activity Diagram: -



**9. Product Use Case Name:** Hygienist reviews the Monthly, Previous Month, Last-year-current-month data

**Trigger:** Hygienist clicked on the visualization button on the top panel

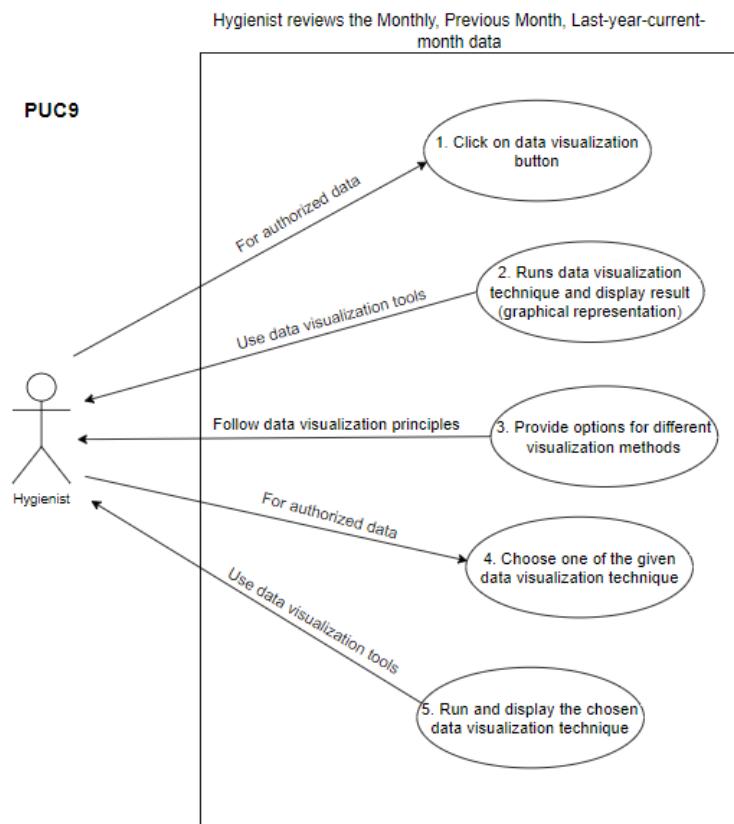
**Preconditions:** Hygienist is logged onto the dashboard

**Interested Stakeholders:** Hygienist, Clinic Manager

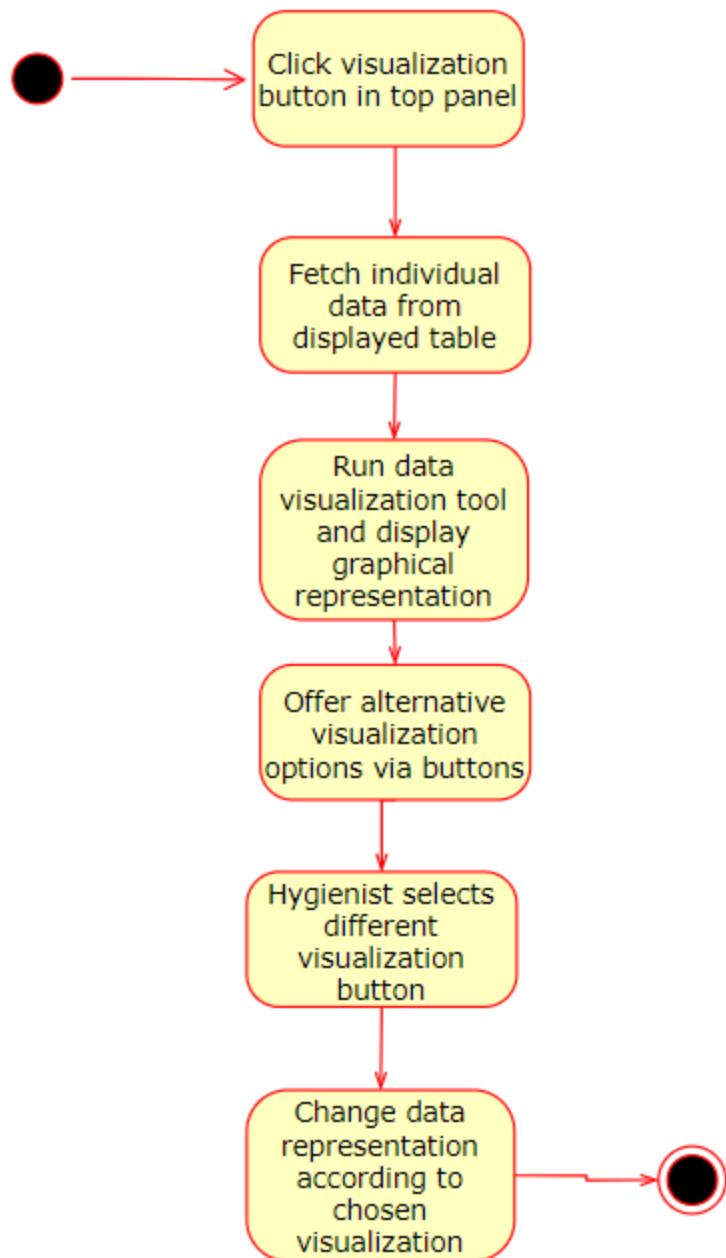
**Actor:** Hygienist

- a. Hygienist clicked on the visualization button on the side navigation panel
- b. The product fetches the data that was being displayed in tabular format, which is the hygienist's individual data in this case
- c. The product runs the data visualization tool to convert the data table into a data visualization and displays the data as a graphical representation
- d. The product gives option of other data visualization that would provide the most information for data analysis in forms of buttons
- e. Hygienist clicks on the other data visualization buttons
- f. The product changes the representation of data according to the chosen data visualization

**Outcome:** Hygienist is able to look at their data in various graphical format and make informed decisions



Activity Diagram: -



11. **Product Use Case Name:** Receptionist logs into the dashboard

**Trigger:** Receptionist opening the web application

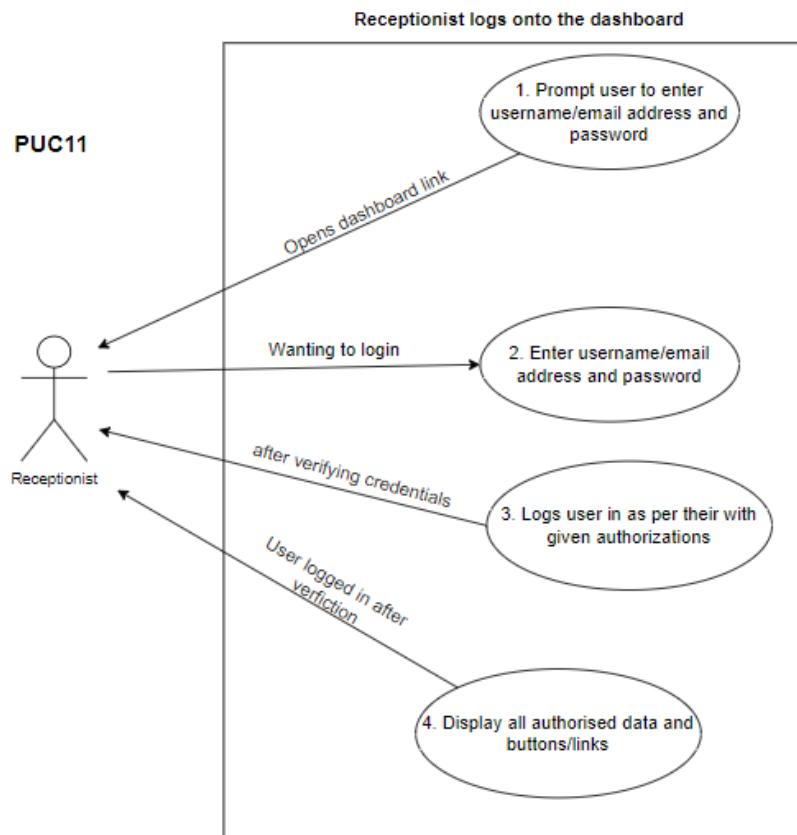
**Preconditions:** Receptionist must have the dashboard link; Receptionist must have access to the dashboard

**Interested Stakeholders:** Receptionist, Clinic Managers

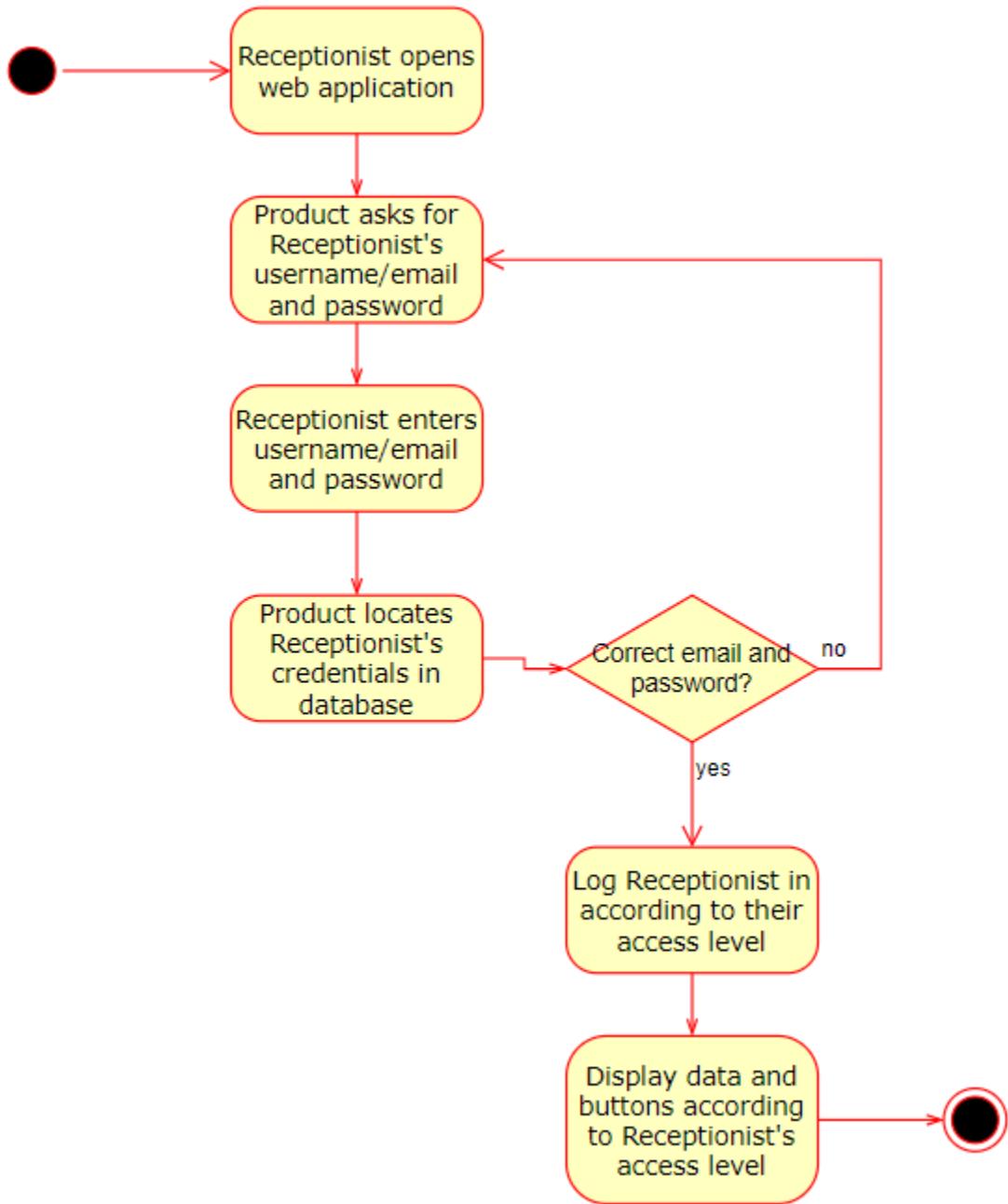
**Actor:** Receptionist

- a. The product asks Receptionist for their username/email address and password
- b. The Receptionist supplies both username/email and password and the product locate the Receptionist's credentials in database
- c. The product logs the Receptionist in according to their "access level"
- d. The product displays all the data and buttons according to the Receptionist's access level

**Outcome:** Receptionist is logged into the Dashboard and is able to review all their individual data



Activity Diagram: -



**12. Product Use Case Name (Out of narrowed down scope):** Receptionist adds new client/patient to the system

**Trigger:** New Client/patient wants to consult with a service provider

**Preconditions:** The client/patient does not exist in the system

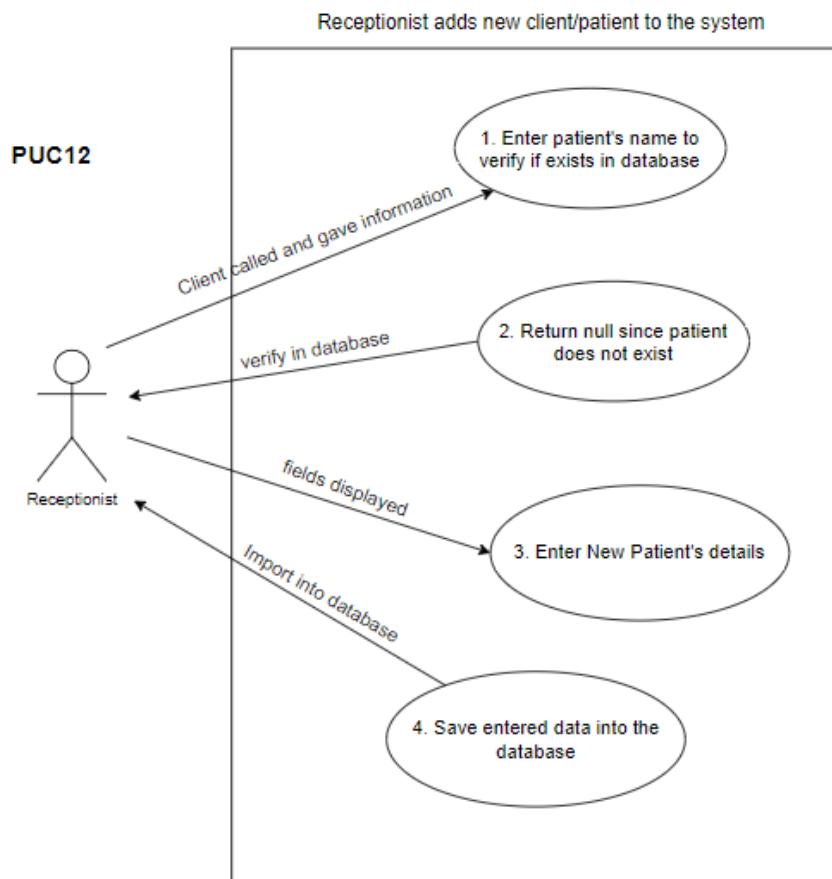
**Interested Stakeholders:** Receptionist, New Client/Patient, Clinic Manager

**Actor:** Client

- a. Client/Patient calls to book an appointment for a consultation with a service provider

- b. Receptionist asks the patient if they are new or existing patient
- c. Client/Patient answers they are new patient
- d. Receptionist asks the client for their name, email and phone number
- e. Client/Patient answers the above information
- f. Receptionist confirms that the patient does not exist in the database
- g. Receptionist adds the Client in the database by clicking on the Add button on the top of the page and entering the asked information
- h. The product adds the information to the database
- i. Client is added to the table

**Outcome:** New client/patient is added to the database



**13. Product Use Case Name (Out of narrowed down scope):** Receptionist sends forms and applications to the Clients/patients to complete and send back

**Trigger:** Client/ Patient calls to book appointment with a service provider

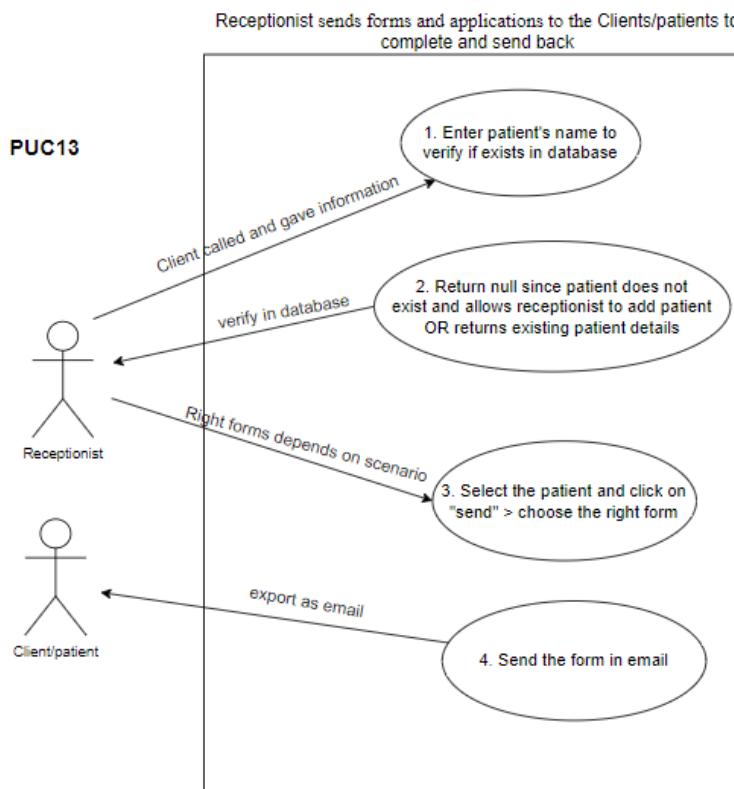
**Preconditions:** Receptionist has access to the dashboard, Receptionist is logged onto the dashboard, Receptionist has knowledge about the right forms and the procedure

**Interested Stakeholders:** Client/Patient, Receptionist, Clinic Manager

**Actor:** Receptionist

- a. Client/Patient calls to book an appointment for a consultation with a service provider
- b. Receptionist asks the patient if they are new or existing patient
- c. Client/Patient answers if they are new patient or existing
- d. Receptionist asks the client for their name, email and phone number
- e. Client/Patient answers the above information
- f. Receptionist confirms if the patient is new or not. If new then the receptionist adds the new patient. If not then Receptionist pulls up the patient details
- g. Receptionist selects the added patient and clicks on the send button on top panel, chooses the right forms, and press send
- h. The product sends the email to the patient with the forms for them to fill out

**Outcome:** The Receptionist is able to send forms and applications to the patients to fill before their appointment



**14. Product Use Case Name (Out of narrowed down scope)** : Receptionists access and edit the forms and applications

**Trigger:** The existing forms and applications needs to be edited with changing business requirements

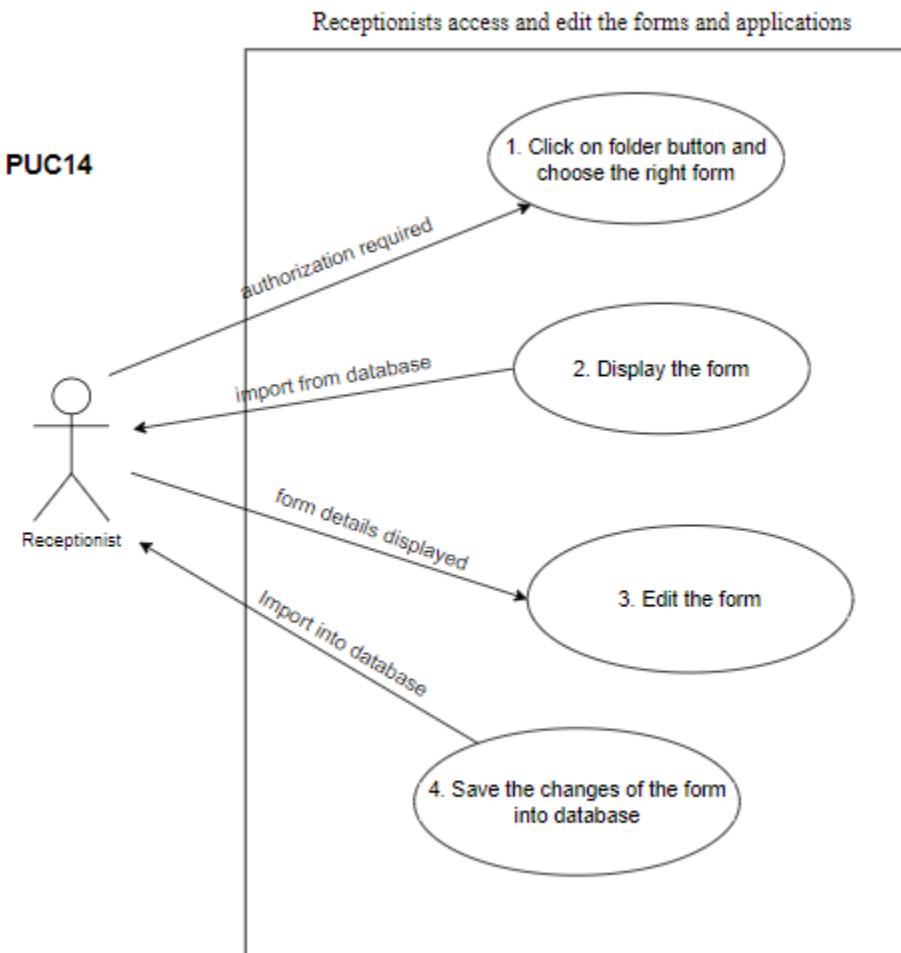
**Preconditions:** Receptionist has access to the dashboard, Receptionist is logged onto the dashboard

**Interested Stakeholders:** Receptionist, Clinic Manager

**Actor:** Receptionist

- a. Clinic Manager informs Receptionist about the changes to be applied in the forms and applications
- b. Receptionist clicks on the folder button on the left navigation panel
- c. The product displays the folder contents - all the forms and applications
- d. Receptionist chooses the form to edit and clicks on the edit button on the top panel
- e. The product changes from viewer mode to edit mode
- f. Receptionist makes the necessary changes and hits Save
- g. The product saves the new changes

**Outcome:** Receptionist is able to edit forms and applications on the dashboard



**15. Product Use Case Name:** General Managers/HR logs onto the dashboard  
**Trigger:** General Managers/HR opening the web application

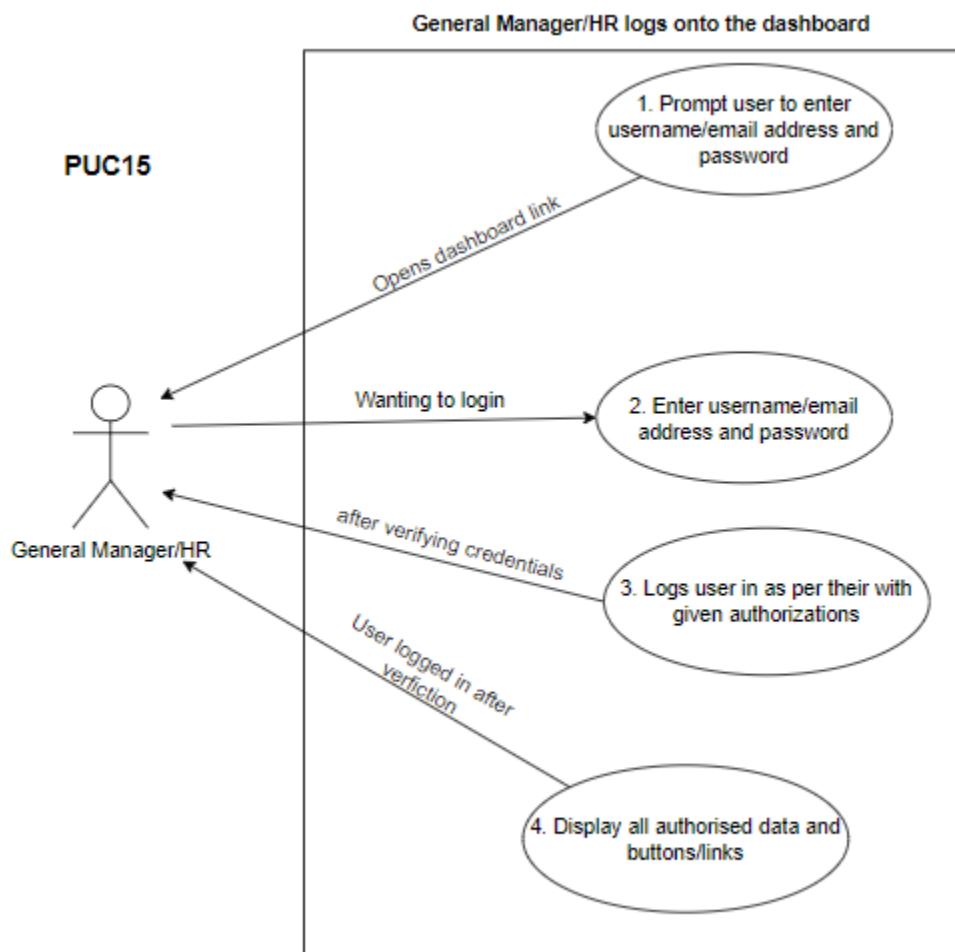
**Preconditions:** General Managers/HR must have the dashboard link, General Managers/HR must have access to the dashboard

**Interested Stakeholders:** General Managers/HR, Clinic Manager

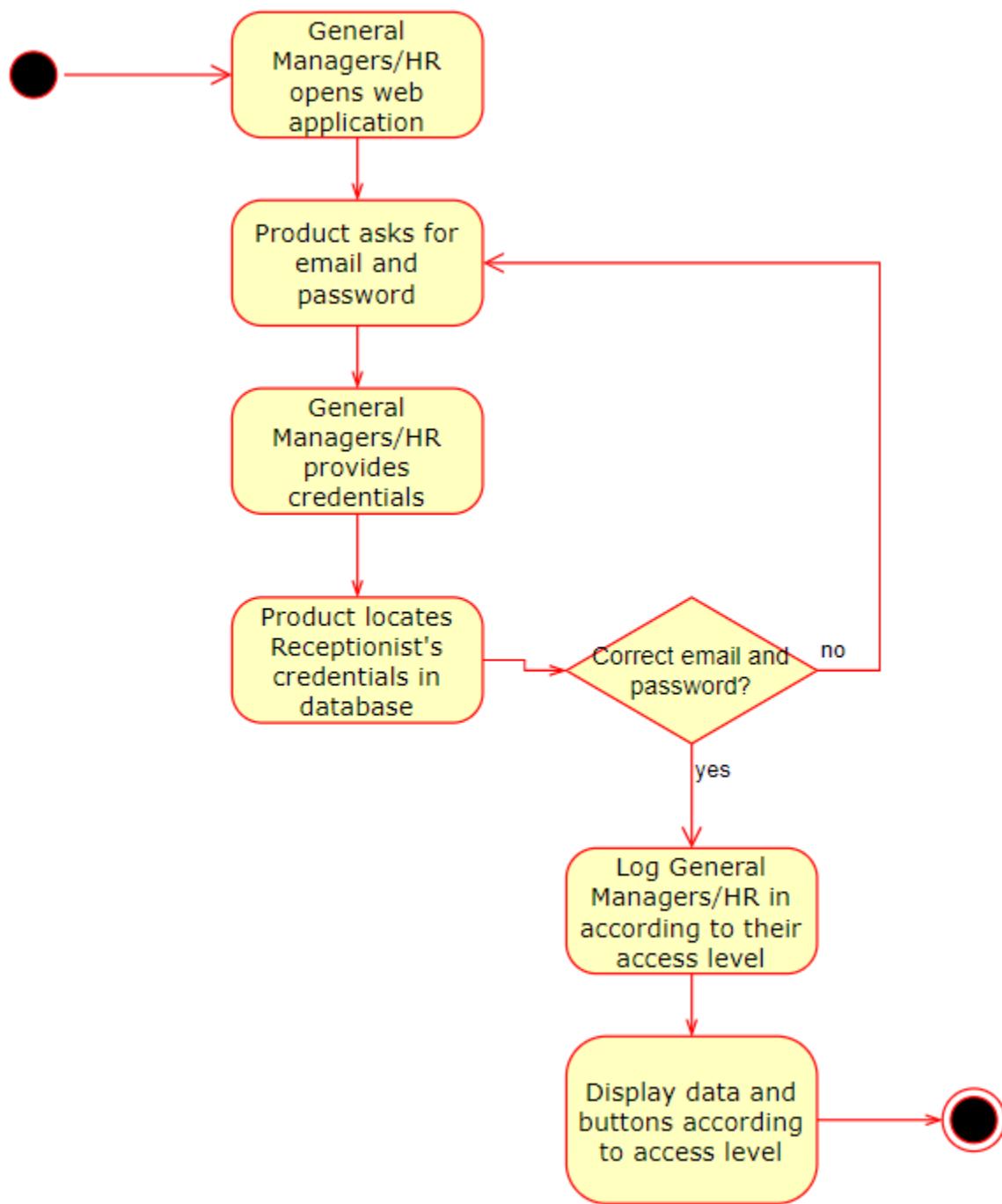
**Actor:** General Managers/HR

- a. The product asks General Managers/HR for their username/email address and password
- b. The General Managers/HR supplies both username/email and password and the product locates the General Managers/HR's credentials in database
- c. The product logs the General Managers/HR in according to their "access level"
- d. The product displays all the data and buttons according to the General Managers/HR's access level

**Outcome:** General Managers/HR is logged into the Dashboard and is able to review all their individual data.



Activity Diagram: -



**16. Product Use Case Name:** Receptionist builds service providers schedule

**Trigger:** All new appointments have been added and it's time to build schedule

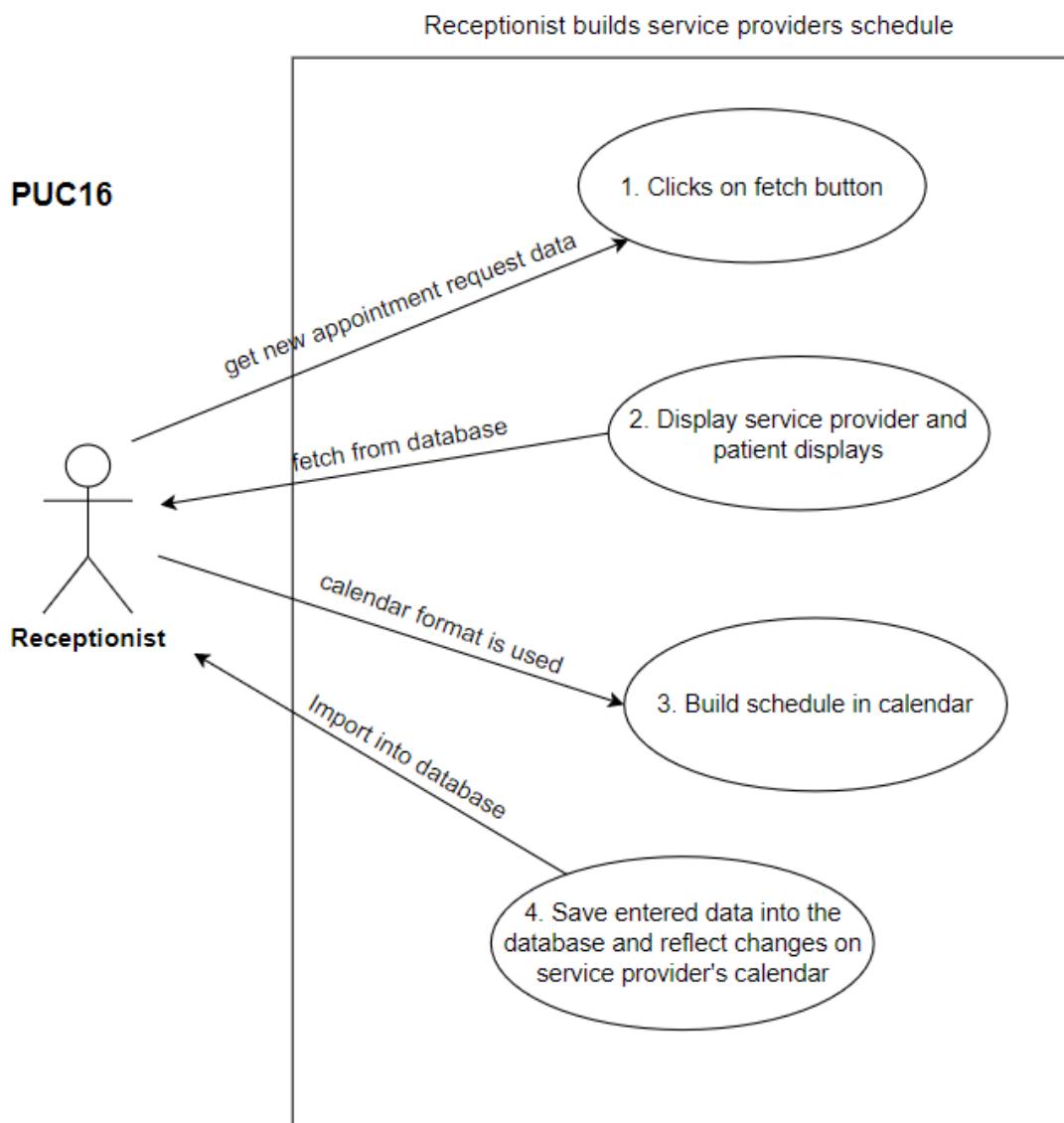
**Preconditions:** Receptionist has access to the dashboard

**Interested Stakeholders:** Receptionist, Dentist, Hygienists, Clients/Patients, Clinic Managers

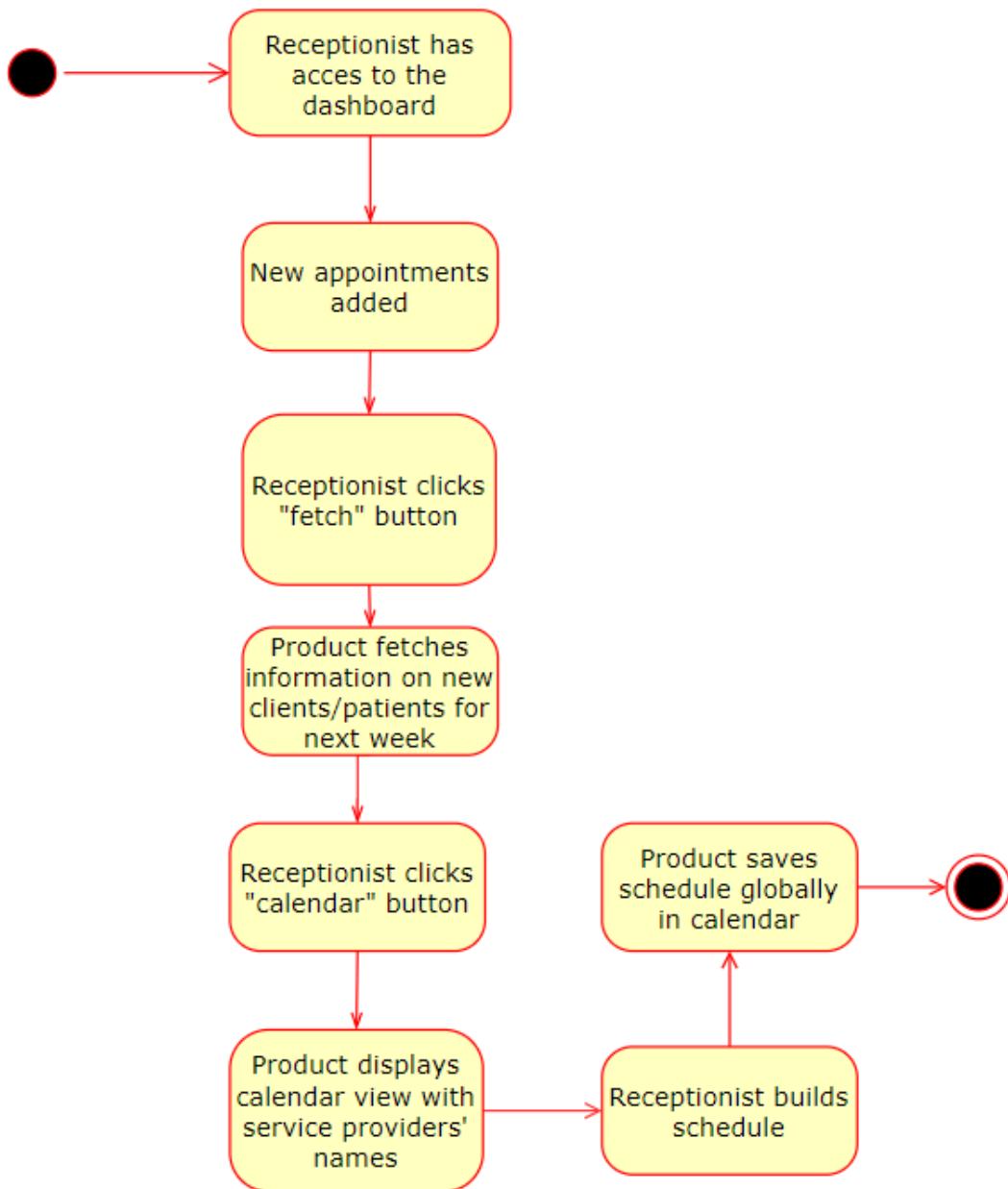
**Actor:** Receptionist

- a. Receptionist clicks on the 'fetch' button
- b. The product fetches all the information about new clients/patients who needs appointment for next week
- c. Receptionist presses on the calendar button
- d. The product displays the calendar view with all service providers name on the left side as a new window
- e. Receptionist build the schedule as per the information gathered
- f. The product saves all information globally in the calendar
- g. Everyone is able to view this calendar in their personal/individual user account

**Outcome:** Receptionist are able to build the schedule for the service providers



Activity Diagram: -



**17. Product Use Case Name:** Marketing Dept Staff logs into dashboard

**Trigger:** Marketing Dept Staff opening the web application

**Preconditions:** Marketing Staff must have the dashboard link, Marketing Staff must have access to the dashboard

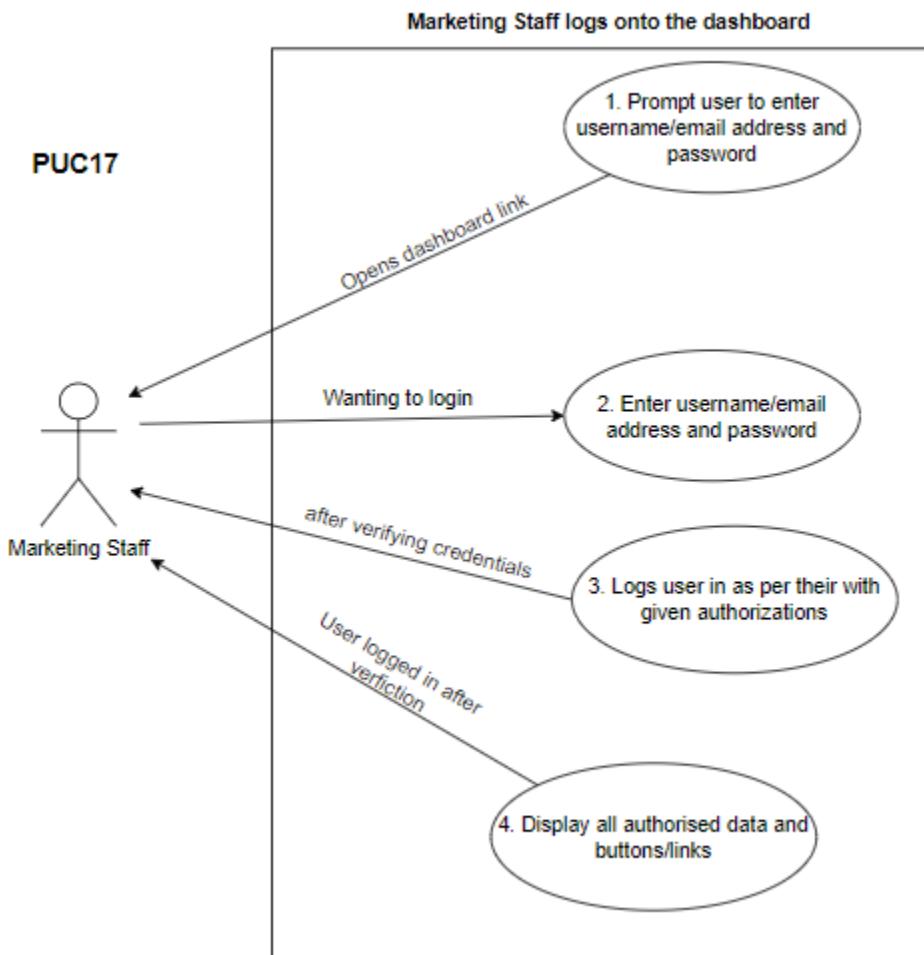
**Interested Stakeholders:** Marketing Staff, Clinic Manager

**Actor:** Marketing Staff

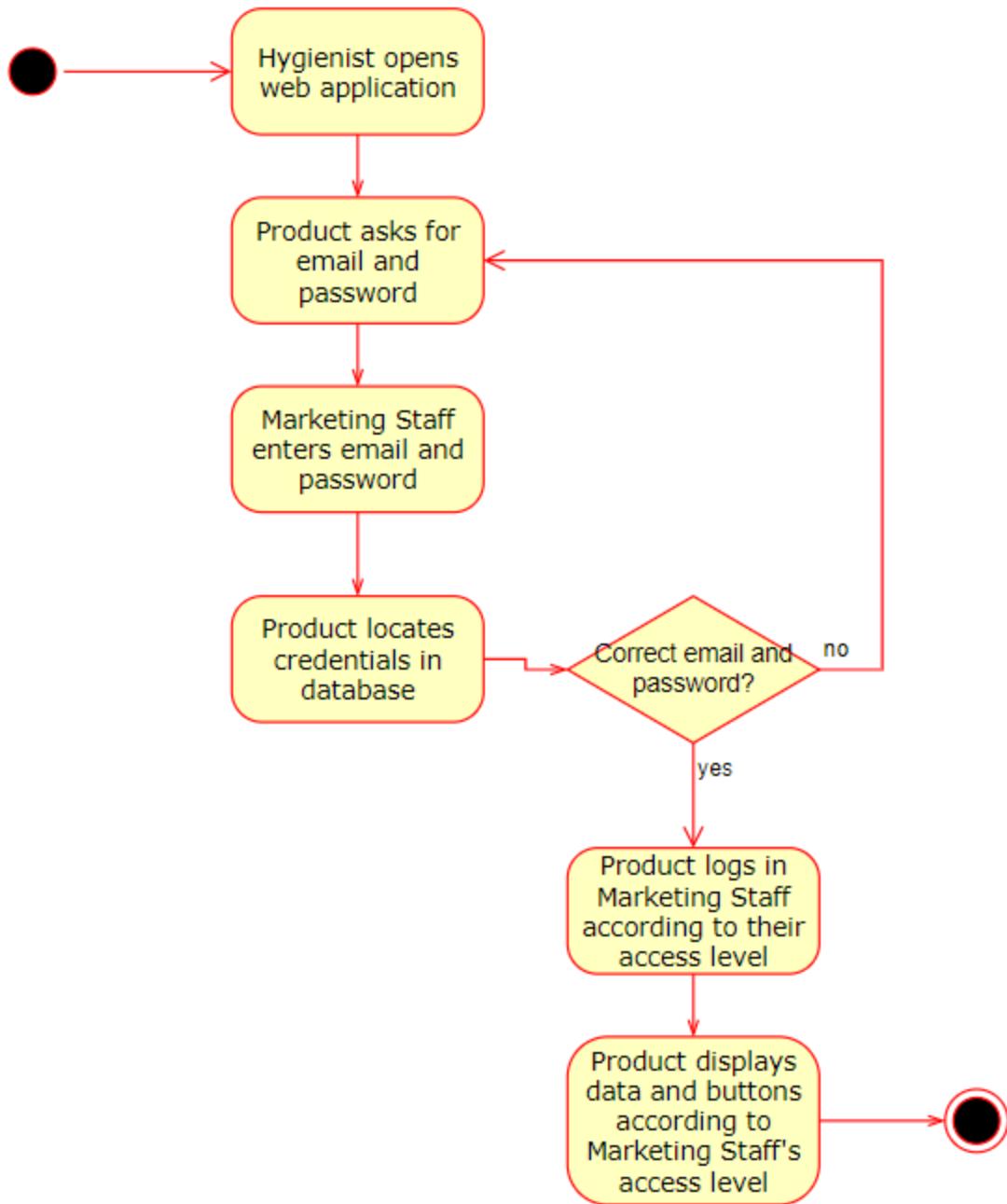
- a. The product asks the Marketing Staff for their username/email address and password

- b. The Marketing Staff supplies both username/email and password and the product locates the Marketing Staff's credentials in the database
- c. The product logs in the Marketing Staff according to their "access level"
- d. The product displays all the data and buttons according to the Marketing Staff's access level

**Outcome:** Marketing Staff is logged onto the dashboard and is able to review all their individual data



Activity Diagram: -



**18. Product Use Case Name (Out of Narrowed down scope):** Marketing Dept Staff import the clients/patients' reviews and feedbacks to make informed decisions

**Trigger:** Marketing Staff clicking on the review button

**Preconditions:** Marketing Staff must have access to dashboard, product is able to import data

**Interested Stakeholders:** Marketing Staff, Clinic Manager

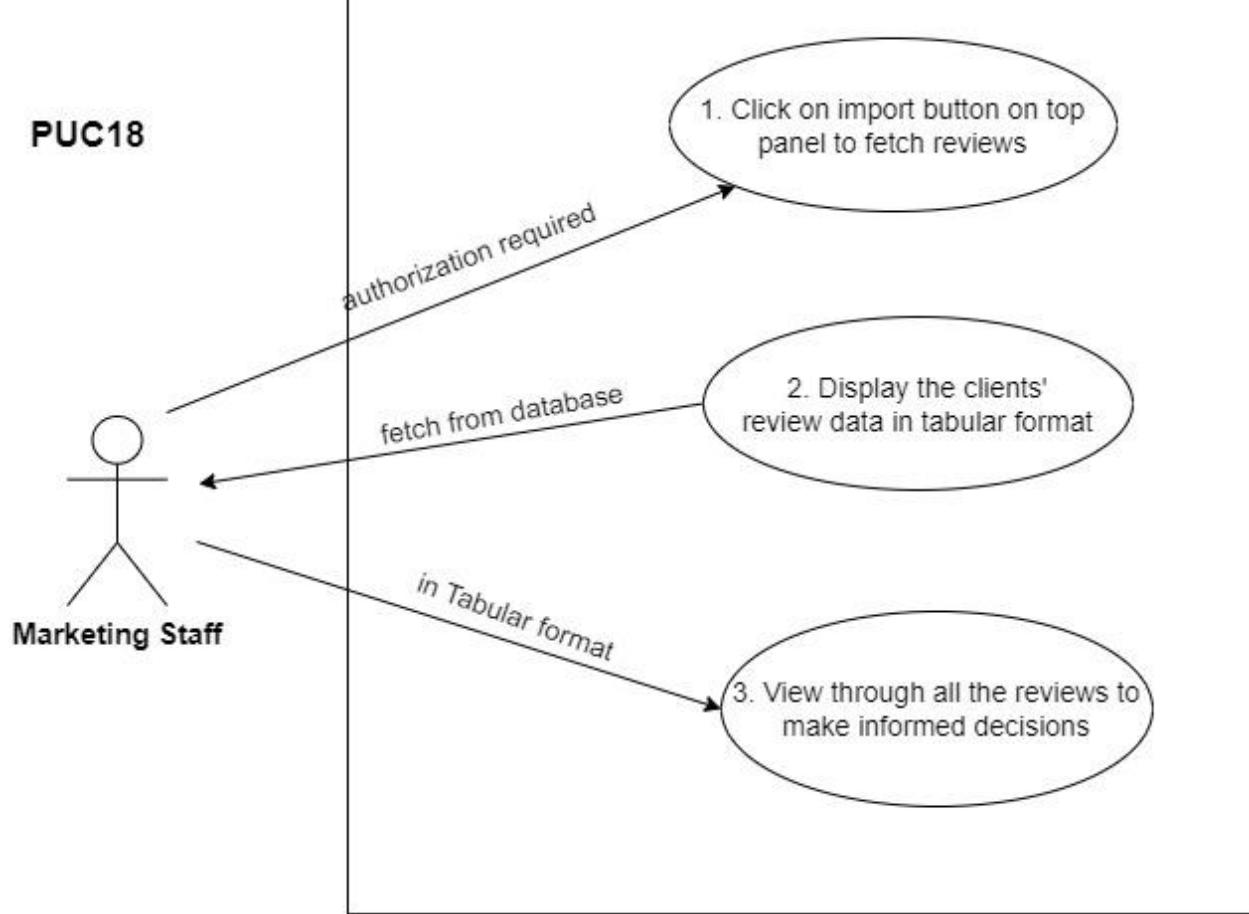
**Actor:** Marketing Staff

- a. Marketing Staff clicks on the import button on the top panel
- b. Marketing Staff is able to scroll through all reviews and make informed decisions

**Outcome:** Marketing Staff is able to look through all the reviews of the business

**PUC18**

Marketing Dept Staff import the clients/patients' reviews and feedbacks to make informed decisions



19. **Product Use Case Name (Out of Narrowed down scope):** Marketing Dept Staff upload marketing tactics, ideas, posters

**Trigger:** Marketing Staff looked through the reviews about the business

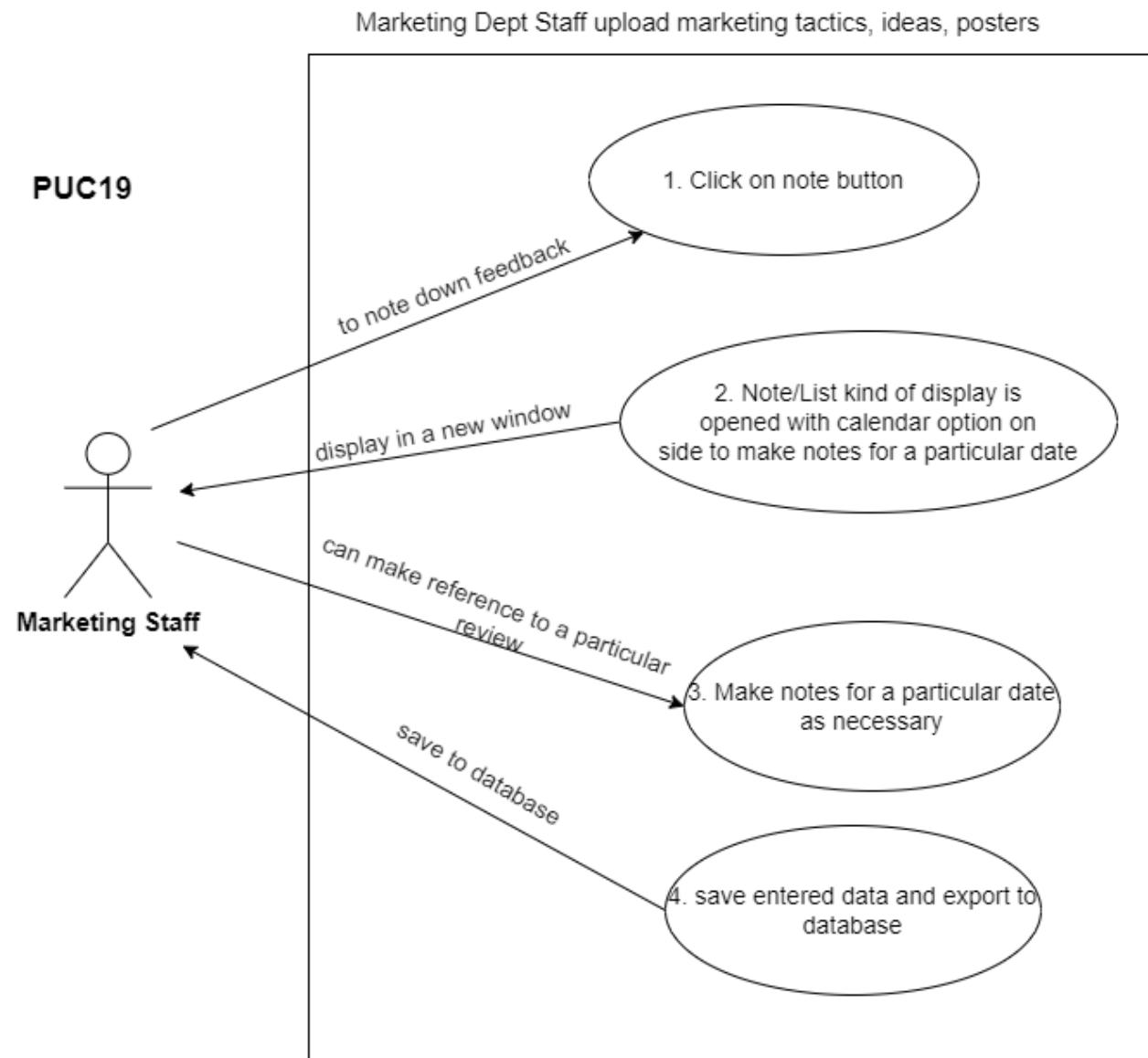
**Preconditions:** Marketing Staff has access to the dashboard, Marketing Staff is logged into dashboard, product is able to import data

**Interested Stakeholders:** Marketing Dept, Clinic Managers

**Actor:** Marketing Staff

- a. Marketing Staff clicks on the note button on the side navigation panel
- b. Product opens the list kind of display in a new window with a calendar on the side navigation panel
- c. Marketing Staff is able to note down their thoughts, marketing tactics as they review the client feedbacks on the main page
- d. Marketing Staff is able to choose another date from the calendar on the side panel to look at their notes from another day
- e. The product saves the note under the current day's date into the database

**Outcome:** Marketing Staff is able to upload marketing tactics, ideas and posters on the dashboard



**20. Product Use Case Name (Out of Narrowed down scope):** Patients/Clients receive forms and applications in email

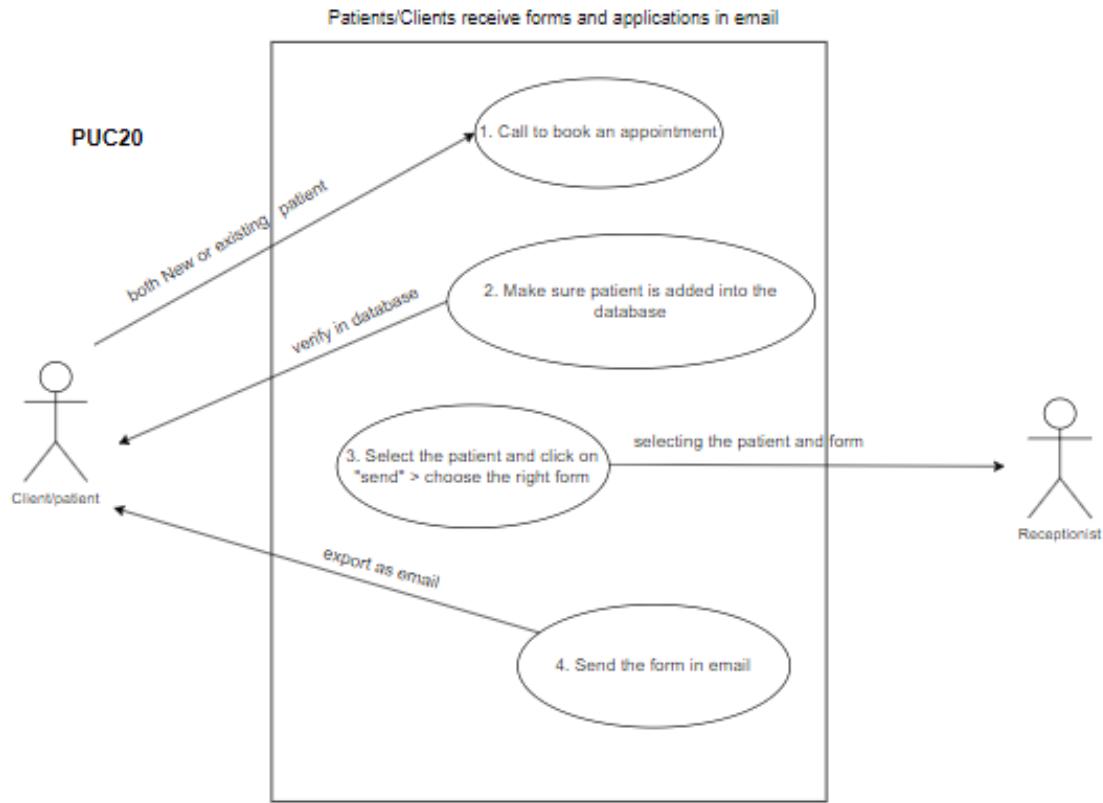
**Trigger:** Client/Patient wants to book an appointment with a service provider

**Preconditions:** Receptionist is able to access dashboard

**Interested Stakeholders:** Client/patients, receptionist, dentist, hygienist, clinic manager  
**Actor:** Client/Patient

- a. Client/Patient calls the clinic to book an appointment
- b. Receptionist asks for details and send the forms and application
- c. Product functions on the receptionist's side and sends the Client/Patient an email with the correct form
- d. The Client/Patient receives email with the forms and application to be filled out

**Outcome:** The Client/Patient receives an email with the forms and application when booking a new appointment



**21. Product Use Case Name (Out of Narrowed down scope):** Patients/Clients send completed forms and applications back

**Trigger:** Client/Patient wants to book an appointment with a service provider

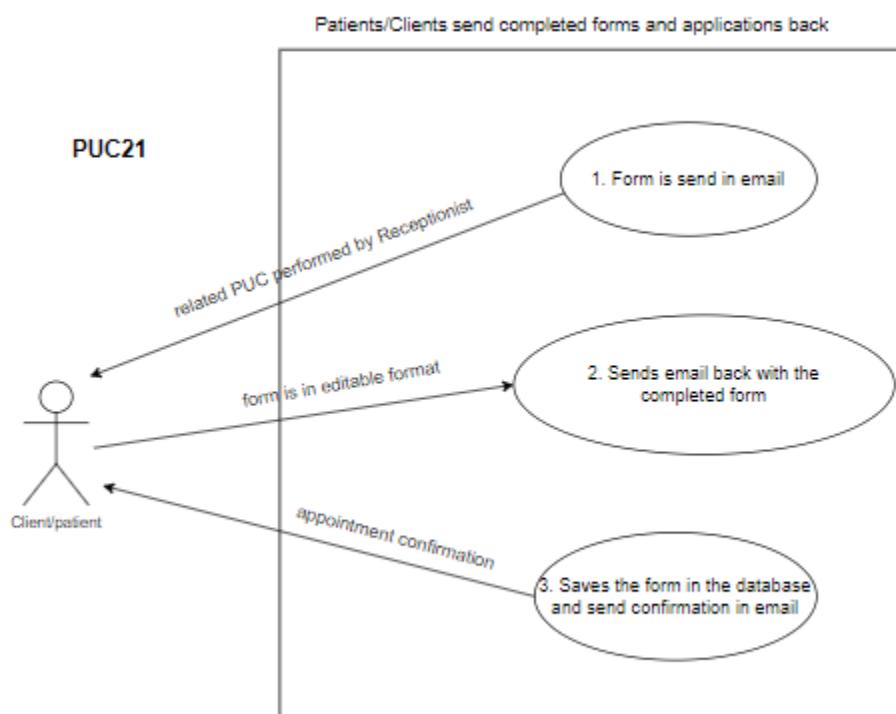
**Preconditions:** Receptionist is able to access dashboard, Client/Patient received email with the forms and applications

**Interested Stakeholders:** Client/patients, receptionist, dentist, hygienist, clinic manager

**Actor:** Client/Patient

- a. The Client/Patient receives email with the forms and application to be filled out
- b. Client/Patient is able to edit the forms and application and send it back to the email address they received it from
- c. Product sends a notification to the Receptionist's account
- d. Receptionist is able to see the forms and email on the dashboard

**Outcome:** Patients/Clients send completed forms and applications back



**22. Product Use Case Name:** Technicians/Developers deploys defects fix package  
**Trigger:** Defects were identified by clinic manager

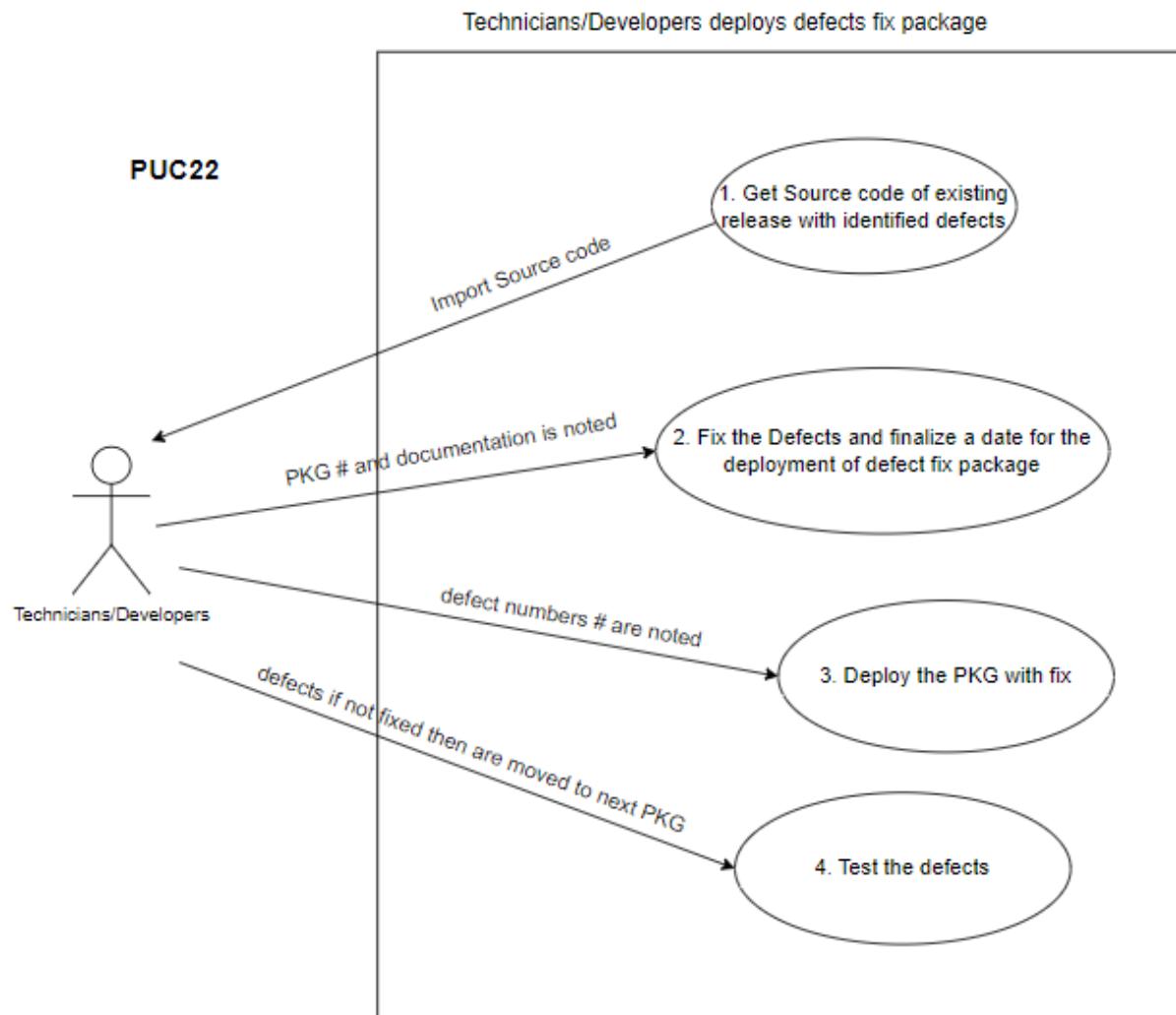
**Preconditions:** Technician/Developers received all the defects from clinic manager, Technician/Developers were able to fix the defects

**Interested Stakeholders:** Technician/Developers, Clinic Manager

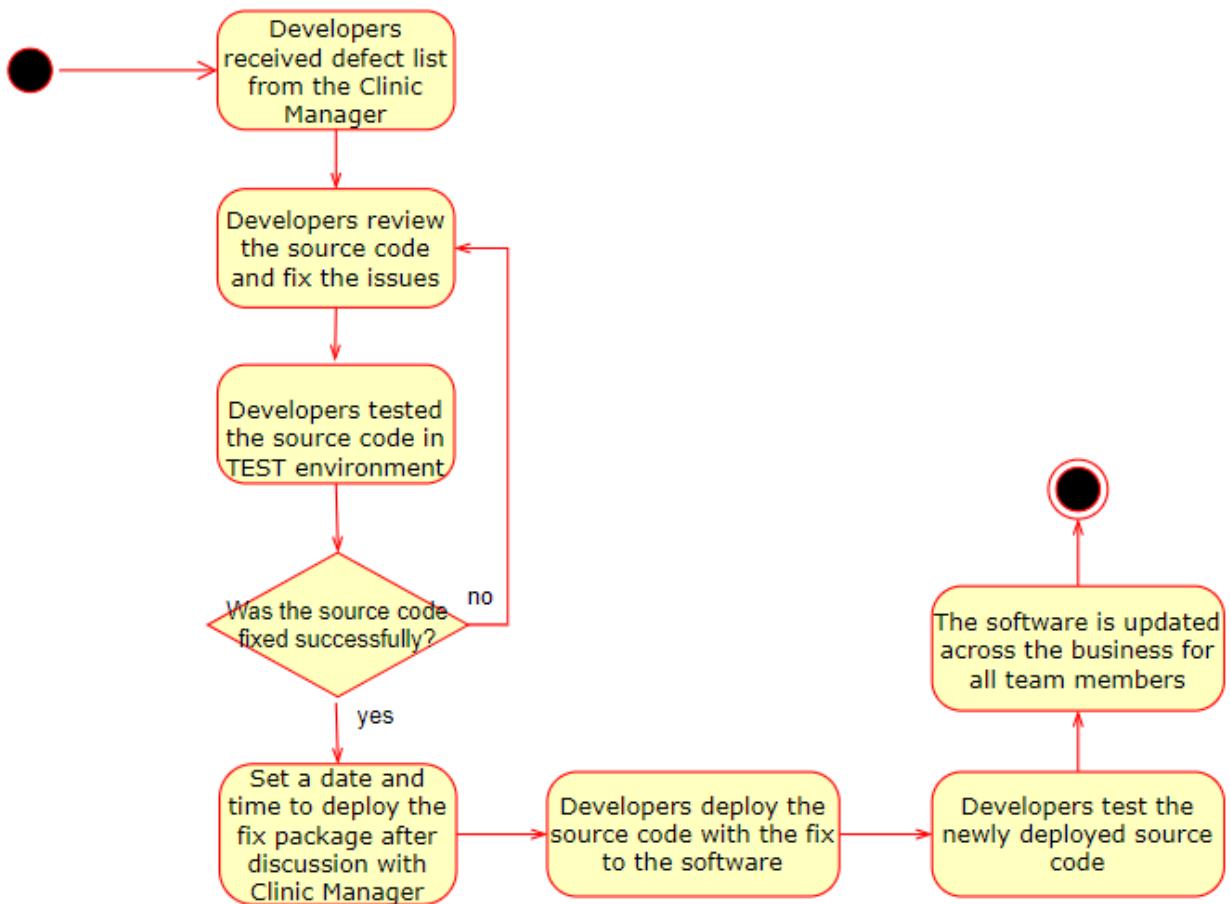
**Actor:** Technician/Developers

- a. Technician/Developers received defect list form the Clinic Manager
- b. Technician/Developers were able to fix the defects
- c. Technician/Developers tested the source code in TEST environment
- d. A set date and time was fixed after discussion with Clinic Manager to deploy the fix package
- e. Technician/Developers deploy the source code with the fix to the software
- f. Technician/Developers test the newly deployed source code
- g. The software is updated across the business for all team members

**Outcome:** The product has updated software with all the existing defects fixed



Activity Diagram: -



**23. Product Use Case Name:** Technicians/Developers uploads new software release  
**Trigger:** Clinic Manager wants new features in the product software

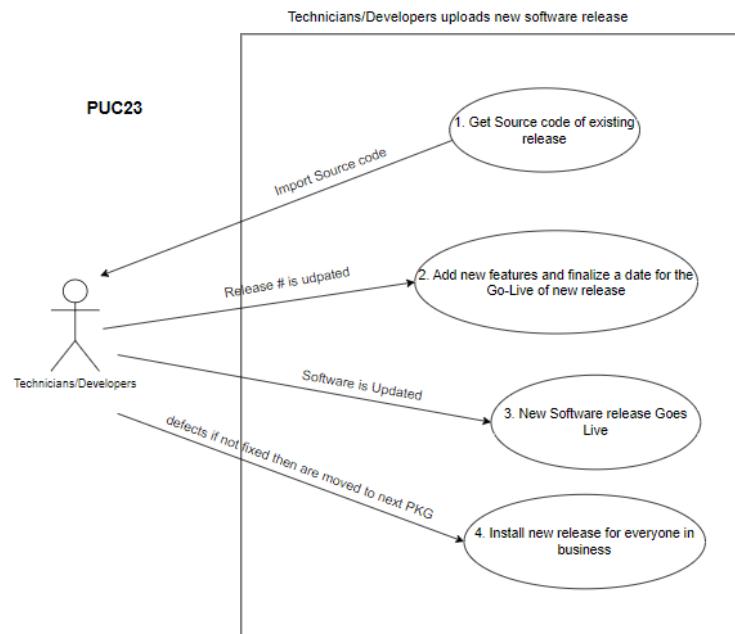
**Preconditions:** Technician/Developers received all the requirements from clinic manager, Technician/Developers were able to create the source for the new features

**Interested Stakeholders:** Technician/Developers, Clinic Managers, Dentists, Hygienists, Receptionist, Marketing Staff, General Manager/HR

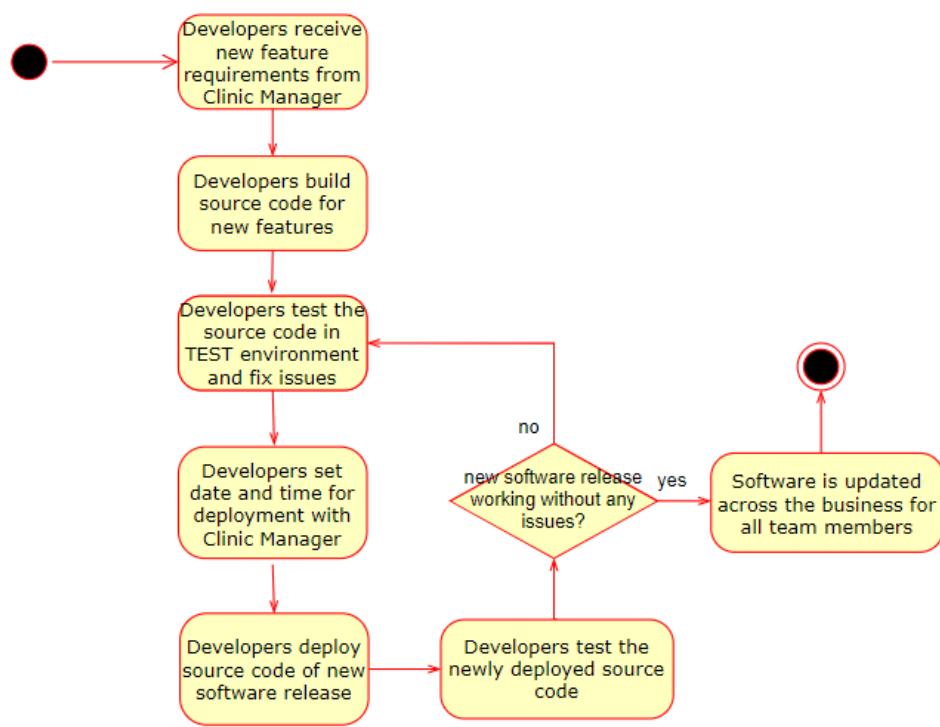
**Actor:** Technician/Developers

- Technician/Developers received the list of new features and requirements from the clinic manager
- Technician/Developers were able to build the source code for these new features
- Technician/Developers tested the source code in TEST environment
- A set date and time was fixed after discussion with Clinic Manager to deploy the new release
- Technician/Developers deploy the source code of the new Software release
- Technician/Developers test the newly deployed source code
- The software is updated across the business for all team members

**Outcome:** The product has updated software with new release that applied new features



Activity Diagram:



# Non-Functional Requirements

## Look and Feel Requirements

### Requirement #: 1

**Description:** The product should be compliant with the branding standards of the client's business

**Rationale:** The product is going to be owned by the business and used by everyone in the business

**Source:** Requirement meeting with client

**Fit Criterion:** The product shall be certified as complying with this year's business's branding standards by the head of communications

**Customer Satisfaction:** 3

**Customer Dissatisfaction:** 3

**Dependencies:** None

**Conflicts:** None

**Supporting Materials:** Work Context Diagram

**History:** Created October 21, 2022

### Requirement #: 2

**Description:** The product has an expensive appearance and is pleasing to eyes

**Rationale:** The employees will be using this product 90% of the work day and should feel motivated to keep working

**Source:** Discussion about web design with client

**Fit Criterion:** The product can be used 20 minutes continuously without feeling strain on eyes (as per office ergonomics rules)

**Customer Satisfaction:** 4

**Customer Dissatisfaction:** 3

**Dependencies:** None

**Conflicts:** None

**Supporting Materials:** Work Context Diagram

**History:** Created October 21, 2022

## Usability and Humanity Requirements

### **Requirement #: 3**

**Description:** The product shall be intuitive and easy to train

**Rationale:** The business employees must find it easy and intuitive; otherwise they will not use it

**Source:** Requirement meeting with client

**Fit Criterion:** The business employees must be able to reduce their time previously wasted on finding documents and details by 30%

**Customer Satisfaction:** 3

**Customer Dissatisfaction:** 2

**Dependencies:** None

**Conflicts:** None

**Supporting Materials:** Work Context Diagram

**History:** Created October 21, 2022

### **Requirement #: 4**

**Description:** The product shall provide the preferred way of working for the personnel

**Rationale:** To build the personnel's confidence in the product

**Source:** Discussion about various user types

**Fit Criterion:** 70% of the personnel shall switch to using the product after a 4-week familiarization period

**Customer Satisfaction:** 3

**Customer Dissatisfaction:** 4

**Dependencies:** None

**Conflicts:** None

**Supporting Materials:** Work Context Diagram

**History:** Created October 21, 2022

## Performance Requirements

### **Requirement #: 5**

**Description:** The response should be fast enough to avoid interrupting user's flow of thought

**Rationale:** The product is going to be used to track business data and make informed decision for the business

**Source:** Discussion about efficiency of the product

**Fit Criterion:** The response time shall be no more than 0.5 second for 95% of responses, and no more than 2 seconds for remainder

**Customer Satisfaction:** 3

**Customer Dissatisfaction:** 3

**Dependencies:** None

**Conflicts:** None

**Supporting Materials:** Work Context Diagram

**History:** Created October 21, 2022

### **Requirement #: 6**

**Description:** The product shall accommodate large database of patient details

**Rationale:** To allow business employees to easily look up historical data as well as current data

**Source:** Discussion about data visualization of current data being compared to last year's data

**Fit Criterion:** The product should be able to fetch and display rows of patients without trouble from the database

**Customer Satisfaction:** 4

**Customer Dissatisfaction:** 5

**Dependencies:** None

**Conflicts:** None

**Supporting Materials:** Work Context Diagram

**History:** Created October 21, 2022

**Requirement #: 7**

**Description:** The product shall be available during all weekdays

**Rationale:** There should not be any maintenance activity interrupting in the clinic's activity

**Source:** Discussion about the product's usage

**Fit Criterion:** The business is able to utilize the product at least 95% of the week without interruption

**Customer Satisfaction:** 5

**Customer Dissatisfaction:** 5

**Dependencies:** None

**Conflicts:** None

**Supporting Materials:** Work Context Diagram

**History:** Created October 21, 2022

## Operational and Environmental Requirements

**Requirement #: 8**

**Description:** The product shall be used during bad weather like rainstorms, snow, and freezing conditions

**Rationale:** The business employees must be able to continue working despite bad weather

**Source:** Discussion about tech stack of the product

**Fit Criterion:** The product shall not have network connection issues from its side

**Customer Satisfaction:** 3

**Customer Dissatisfaction:** 4

**Dependencies:** None

**Conflicts:** None

**Supporting Materials:** Work Context Diagram

**History:** Created October 21, 2022

## Maintainability and Support Requirements

### **Requirement #: 9**

**Description:** The product shall have quick maintain response time

**Rationale:** The business employees must not face long interruptions in their work

**Source:** Discussion about the product's user types

**Fit Criterion:** The mean time to restore the system must not be greater than 10 minutes

**Customer Satisfaction:** 4

**Customer Dissatisfaction:** 4

**Dependencies:** None

**Conflicts:** None

**Supporting Materials:** Work Context Diagram

**History:** Created October 21, 2022

## Security Requirements

### **Requirement #: 10**

**Description:** The product should ensure only authorized users have access to the patient's data

**Rationale:** The product contains patient private and confidential information

**Source:** Discussion about the product's data

**Fit Criterion:** The confidential information shall only be accessed by authorized users

**Customer Satisfaction:** 5

**Customer Dissatisfaction:** 5

**Dependencies:** None

**Conflicts:** None

**Supporting Materials:** Work Context Diagram

**History:** Created October 21, 2022

**Requirement #: 11**

**Description:** The product shall prevent all personal and confidential patient's data from being printed

**Rationale:** The leakage of this data will have catastrophic effect

**Source:** Discussion about the type of data

**Fit Criterion:** The product shall deliver data in a manner than prevents further or second-hand use by unauthorized people

**Customer Satisfaction:** 5

**Customer Dissatisfaction:** 5

**Dependencies:** None

**Conflicts:** None

**Supporting Materials:** Work Context Diagram

**History:** Created October 21, 2022

## Cultural Requirements

**Requirement #: 12**

**Description:** The product shall not be offensive to any religion or ethnic group

**Rationale:** To respect users of all ethnicities, cultures, races and religions

**Source:** Patient Data includes personal details

**Fit Criterion:** The product shall not display any religious symbols or words associated with mainstream religions and also not show any favoritism, bias or discrimination against any particular demographic group

**Customer Satisfaction:** 4

**Customer Dissatisfaction:** 4

**Dependencies:** None

**Conflicts:** None

**Supporting Materials:** Work Context Diagram

**History:** Created October 21, 2022

## Legal Requirements

### **Requirement #: 13**

**Description:** The product should be fully compliant with the privacy laws of Canada

**Rationale:** The product should not violate any laws and maintain privacy for the comfort of users

**Source:** Discussion about type of data product includes

**Fit Criterion:** The product shall meet all required guidelines set by the Government of Canada when dealing with patient's details/data

**Customer Satisfaction:** 5

**Customer Dissatisfaction:** 5

**Dependencies:** None

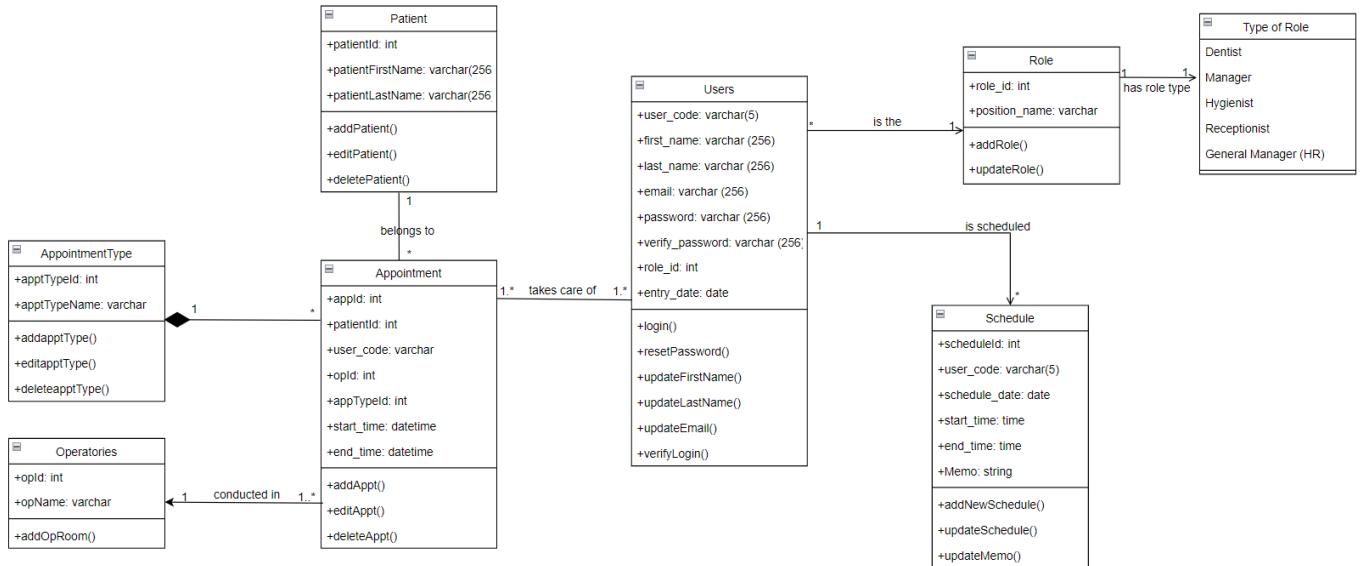
**Conflicts:** None

**Supporting Materials:** Criminal Code of Canada, Work Context Diagram

**History:** Created October 21, 2022

# Complete Design

## Class Diagram

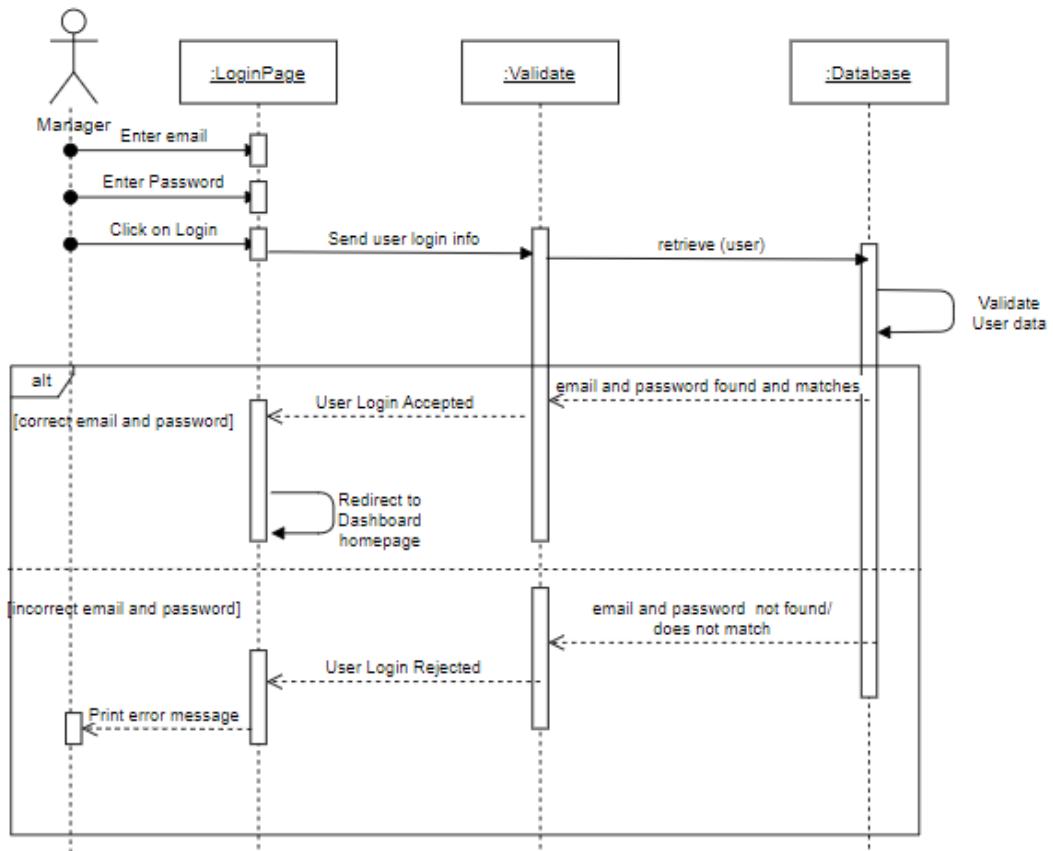


# Sequence Diagrams

3 sequence diagrams for the main functionalities of the system

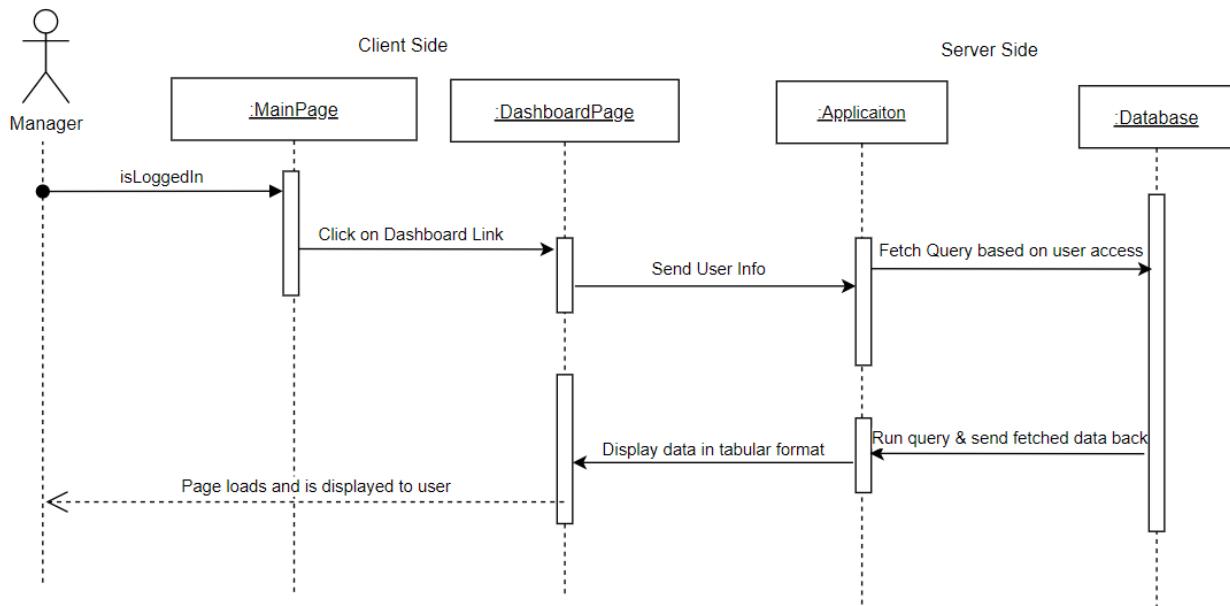
## 1. Manager trying to log in

User tries to log in. If successfully logs in then redirected to the Dashboard main page



## 2. Manager tries to view the 'Dashboard' page

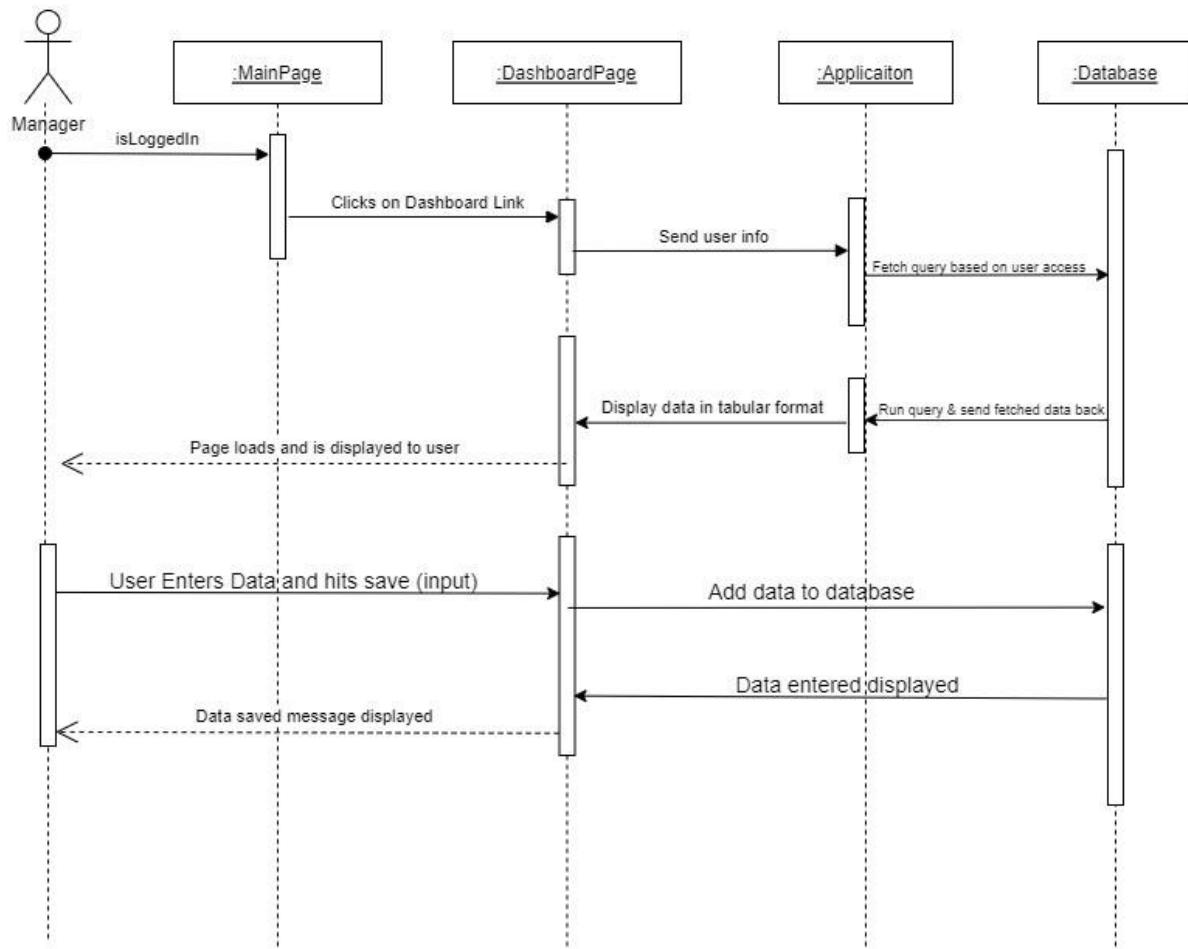
The link 'Dashboard' on the homepage takes the user to the 'Dashboard' page that prints out the data as per the user level and it is fetched from the database



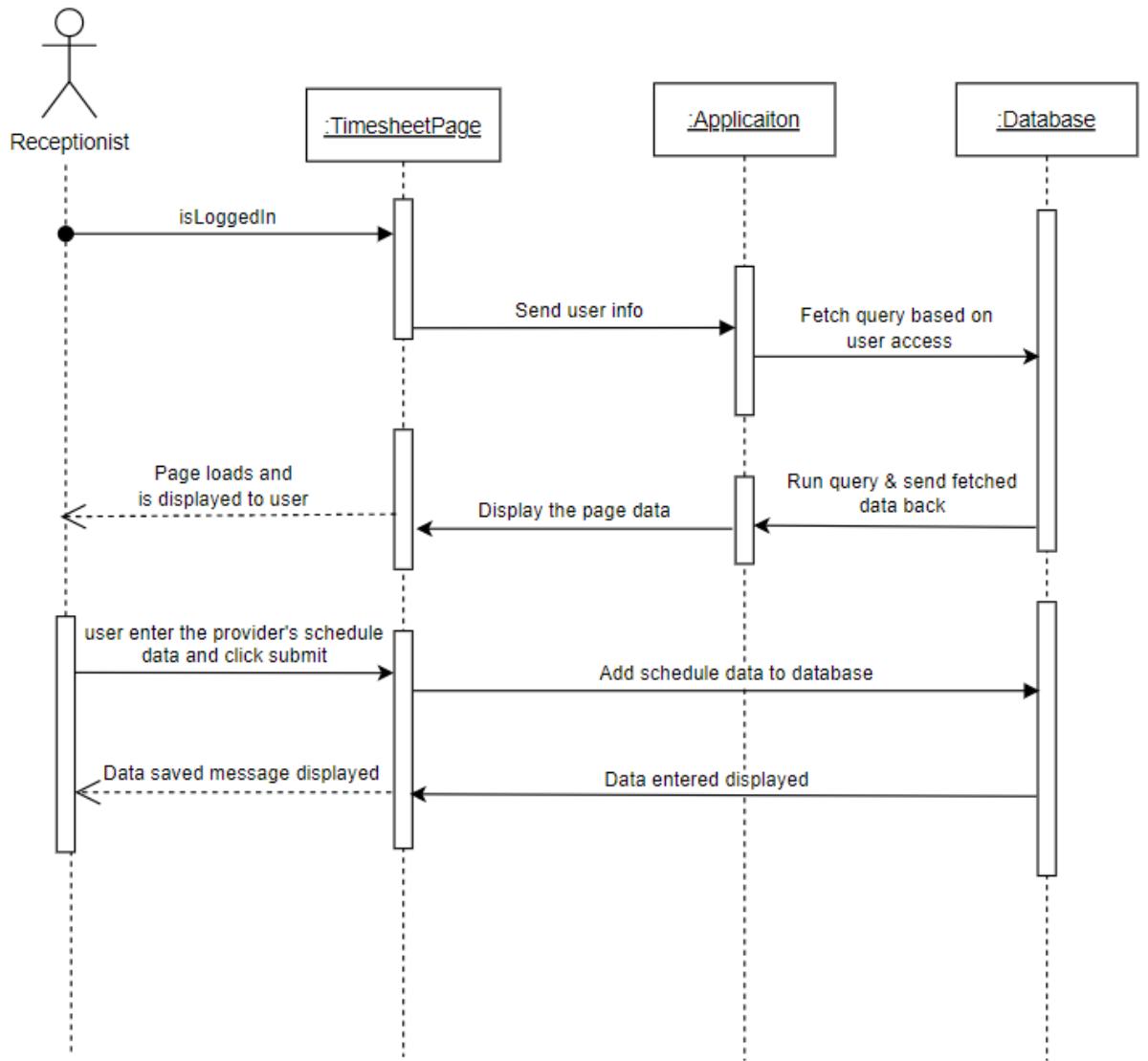
*Manager goes to Dashboard Page and looks at their data based on their access level*

### 3. Manager edits data on the 'Dashboard' page

The Manager edits displayed data on the dashboard page. The data is sent to the database and saved in the database.

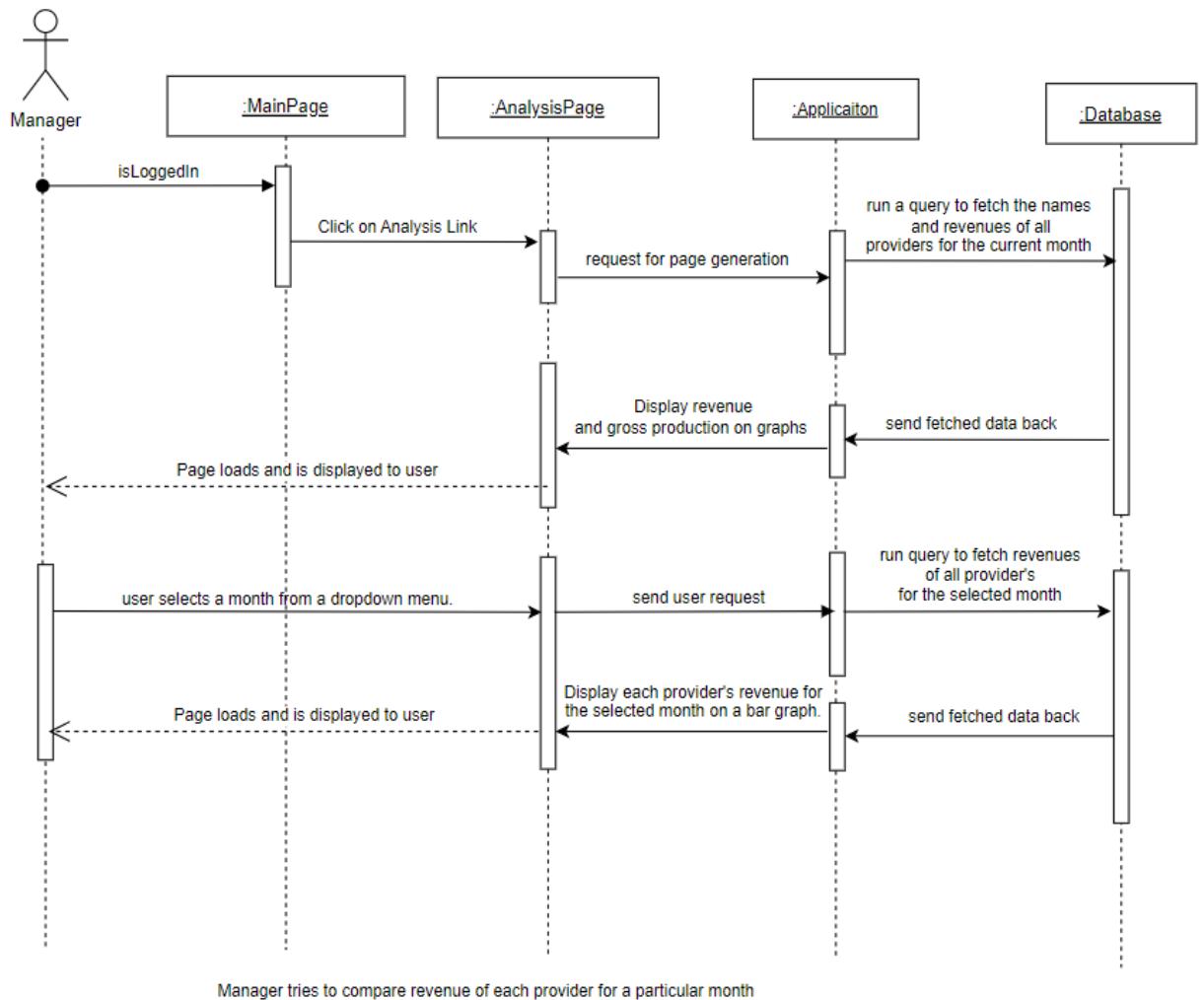


#### 4. Receptionist tries to add a provider's schedule

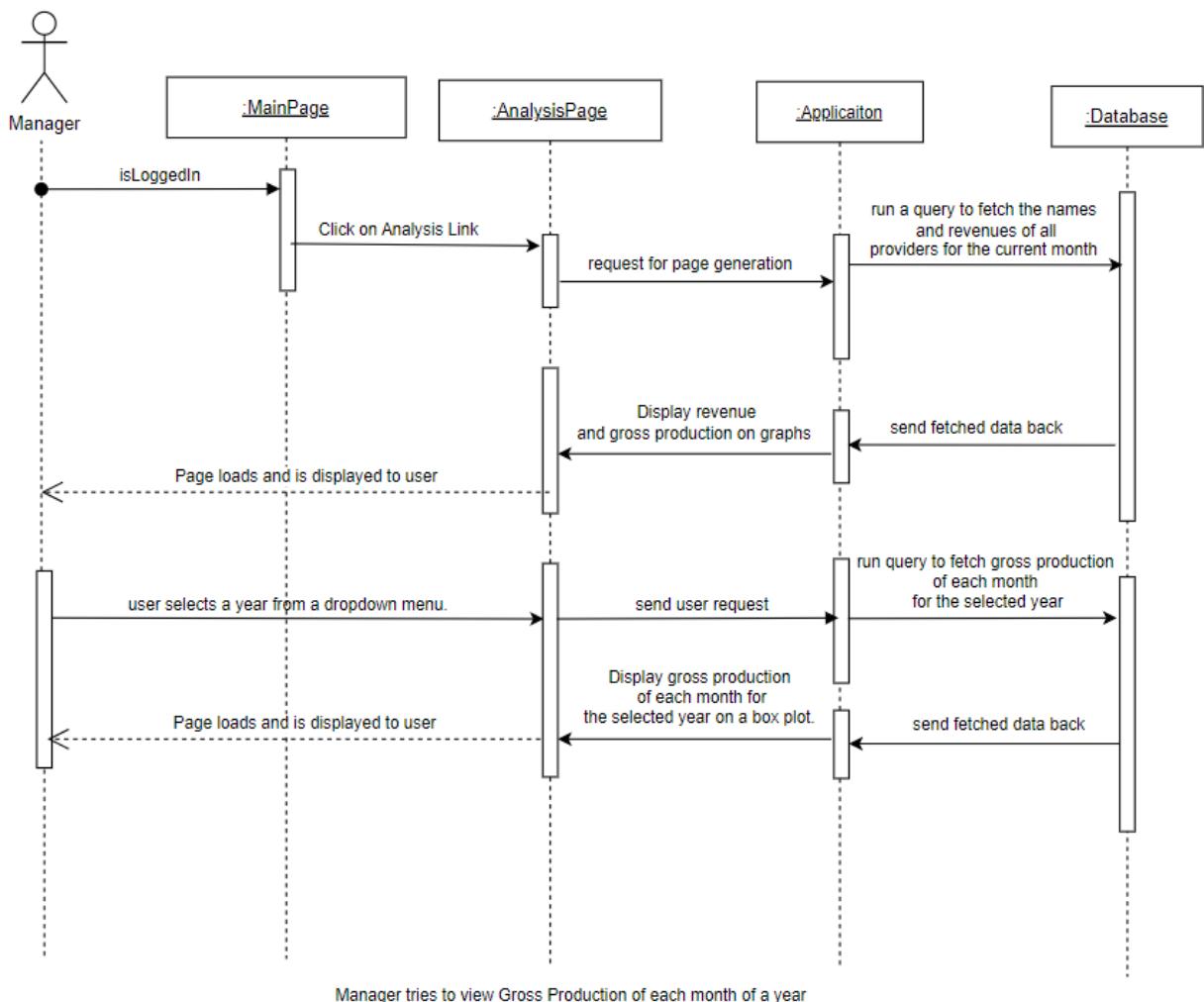


*Receptionist tries to add a provider's schedule*

5. Manager tries to compare revenue of each provider for particular month



## 6. Manager tries to view Gross Production of each month of a year



# APIs & Off-Shelf Components

The project aims to develop a web application data analysis dashboard and uses a few off the shelf software and APIs. The list of APIs and off the shelf components being used are:

## 1. plotly.js

- plotly.js is a free and open source JavaScript charting library that helps in the data visualization of data. It consists of packages like matplotlib, ggplot2 or MATLAB and comes with over 40 chart types, 3D charts, statistical graphs and SVG maps.
- For the ‘Analysis’ of our data, we will be using plotly.js to graph the statistical data for the client to be able to make informed decisions about their business.

## 2. Existing Database and Servers - Loki, Longworth Svr

- The client will be responsible for buying a database and servers for the final product to be deployed on. For test purposes we are using Loki (as TST Server)
- The client currently has one server - LongworthSvr that holds the third party application data. This is where we are exporting the data from. The database is being written in SQL
- The client will move ahead with the database and servers once the product is ready

## 3. Third Party Application Database

- The client uses a third party software - ClearDent. We will be reading some applicable data from this proprietary software’s database and writing into our database before proceeding with using the data for analysis

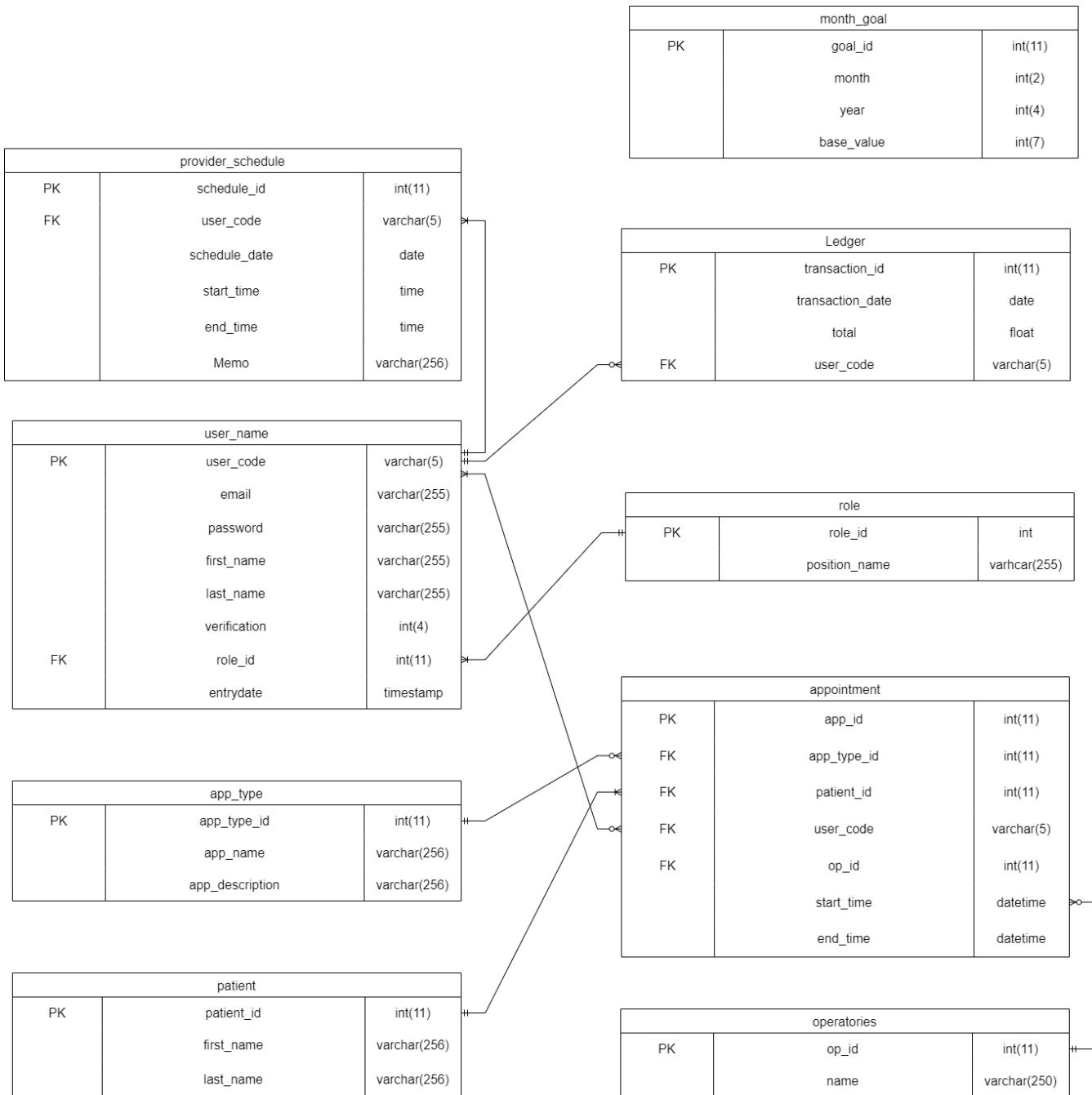
## 4. Microsoft SQL Server Management Studio

- For all our database queries (SQL), we are using SSMS 2018. This included creating a scheduled job to be run weekly that will export the client data every Sunday 10PM. The Manager will then upload this data to our application where we will import it into our database for the dashboard.
- Currently the express edition of the SSMS does not support SQL Server Agent which is required to run weekly jobs. This limits the user’s flexibility on choosing the type of SSMS version. Therefore we are running a Powershell Script to run weekly jobs

## 5. Powershell Terminal and Script

- We wrote a Powershell Script that will connect to user’s server, database and network and run a weekly job to export data from the third party application being used by the provider and download the data in a CSV format which will be then uploaded to our application to import into the application database

# Database Design Diagram



# UI Design

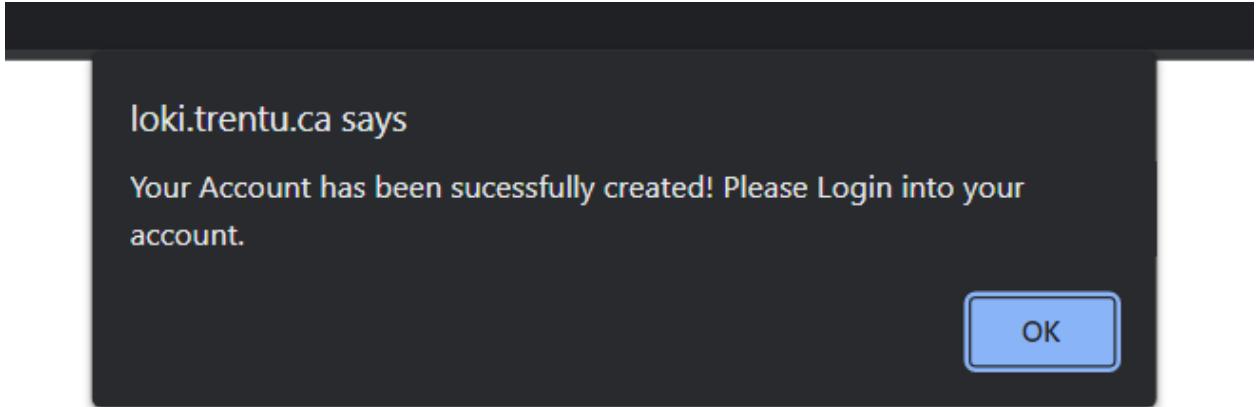
## Sign Up Page

Desktop Version:

The screenshot shows a desktop browser window for a sign-up page titled "Sign Up to Story". The page includes fields for "FIRST NAME" and "LAST NAME", both with placeholder text " ". Below these are fields for "EMAIL ADDRESS" (placeholder "name@example.com") and "PASSWORD" (placeholder "\*\*\*\*\*"). A note below the password field states: "For Password: Use at least 8 or more characters with a mix of letters, numbers & symbols". There is also a "CONFIRM PASSWORD" field with a placeholder "\*\*\*\*\*". To the right of the form, there is a vertical "OR" separator followed by three social media sign-in buttons: "Continue with Apple", "Continue with LinkedIn", and "Continue with Google".

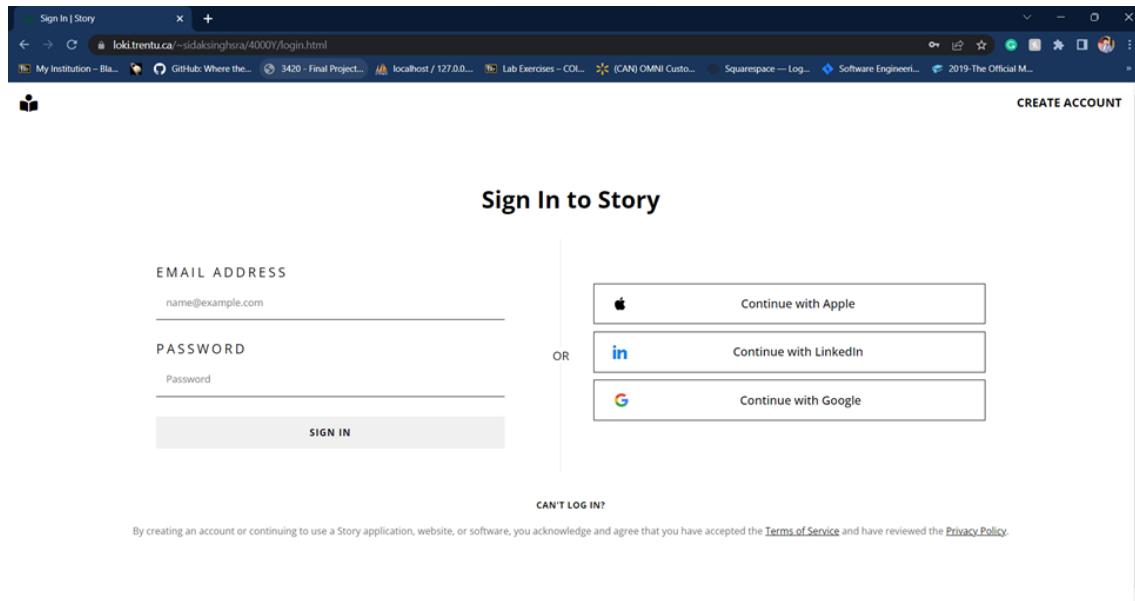
This screenshot shows the same desktop sign-up page as above, but with additional fields. It includes "EMAIL ADDRESS" (placeholder "name@example.com"), "PASSWORD" (placeholder "\*\*\*\*\*"), and "CONFIRM PASSWORD" (placeholder "\*\*\*\*\*"). Below these, there is a new field labeled "USER CODE" with a placeholder " ". At the bottom of the form, there is a dropdown menu labeled "POSITION:" with "Dentist" selected. A large "SIGN UP" button is centered at the bottom of the form area.

**ALREADY HAVE AN ACCOUNT?**  
By creating an account to use a Story application, website, or software, you acknowledge and agree that you have accepted the [Terms of Service](#) and have reviewed the [Privacy Policy](#).



## Login Page

### Desktop Version:

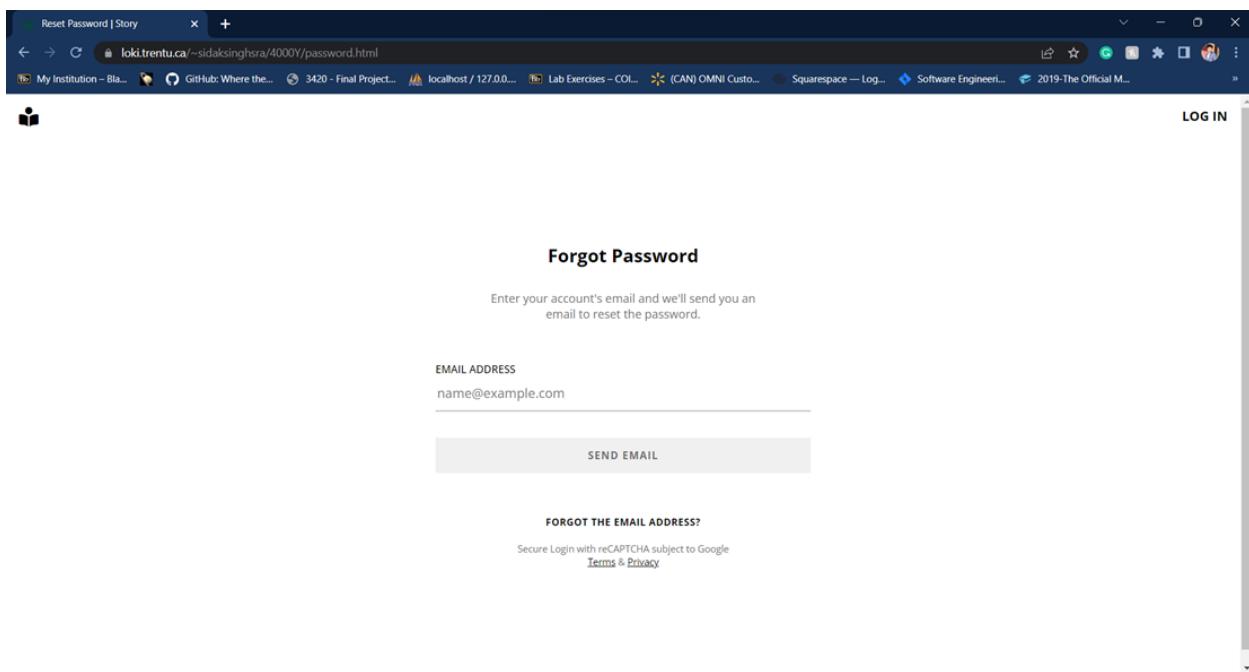


**About our LOGIN page design:** - This is our project's LogIn page. To make it simpler and easier for our users to discover each piece on our page, we used a black and white layout. This has a sign-in form on the left side where users may sign in by just entering their credentials. The client wanted us to display the option for them to utilize social sites like Apple, Google, and LinkedIn to log in, however this is not implemented as a functionality. The page elements are enhanced and made clearer by the OR line that separates these two types. After that, there is a Can't log in button that will direct the user to the Forgot Password Page. There is a line with the terms of service and privacy policy under it. The corporate logo of Open Book Reader may be seen at the top left of

the website, and a button to register an account will be found on the right. Additionally, we have utilized various hover transitions on our website. For example, if the user hovers over the sign-in button, the backdrop will change to black and the text color to white. It gives the page a simpler, more unified appearance. Additionally, the line under links on the website will transform when the user hovers over them.

## Forgot Password Page

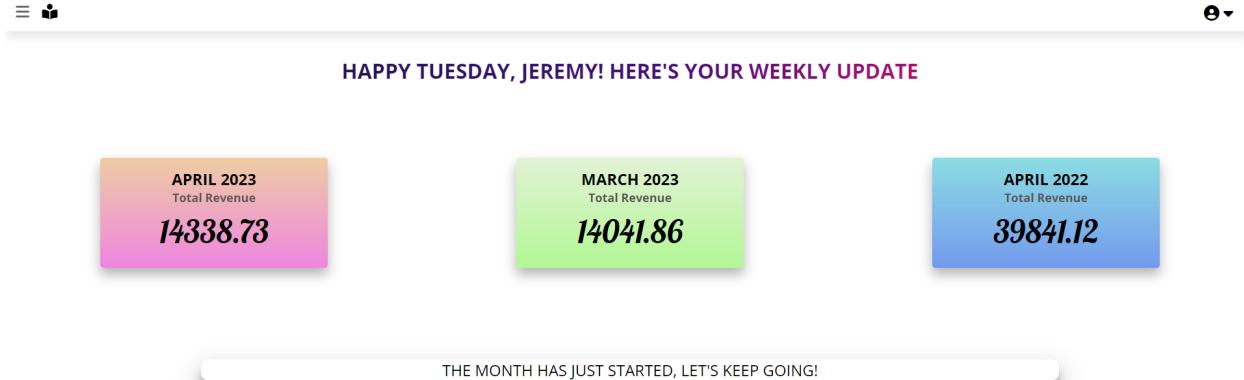
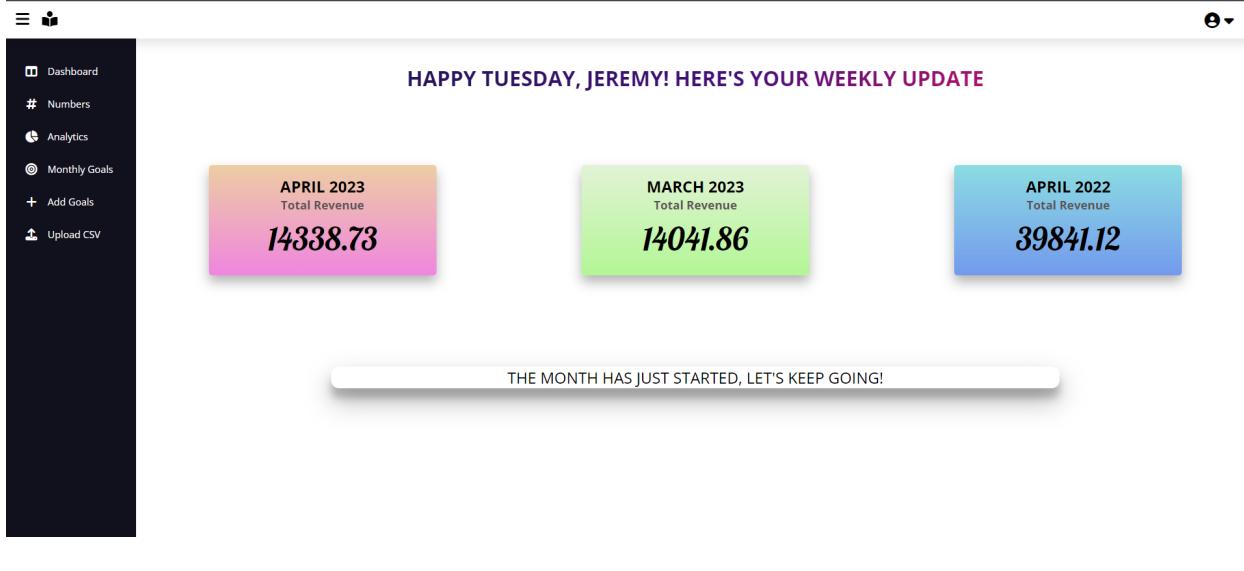
### Desktop Version: -



**About our Forgot Password design:** - Both the desktop version and the mobile version of our website contain a Forgot Password Page. As you can see, we used the same design for this as we did for the sign-in page to make it appear more streamlined, uniform, and user-friendly across all of the sites. All of the links on this page also have a transition effect. The user will be sent to the SIGN IN page if they click the LOGIN link, which is currently located at the top. The Terms & Policy link and statement are also on this page. To update their password for their credentials, users need to input their email address here and press the send email button.

## Main Dashboard Page - Manager

### Desktop Version



**About our Main Page design:** - This is our main dashboard page. The top navigation has a three-line bar on the left side that, when clicked once, will open the sidebar and instantly shrink the page's contents. When the user clicks on this sidebar once again, it can be closed. The text links in the sidebar also have a hover effect that causes them to get brighter and white as the user moves their cursor over them. Using a dark naval tone with white hues, we decided to stick with the same concept throughout the entire page. After that, the search input box appears, followed by the corporate logo.

The user profile dropdown button is located in the upper right corner of the navigation and, when clicked, opens the dropdown menu seen in the figure below.

The Account link, settings link, and Logout link will all be shown; we developed these links so that users could set their Account settings in one location and log out from this Profile button.

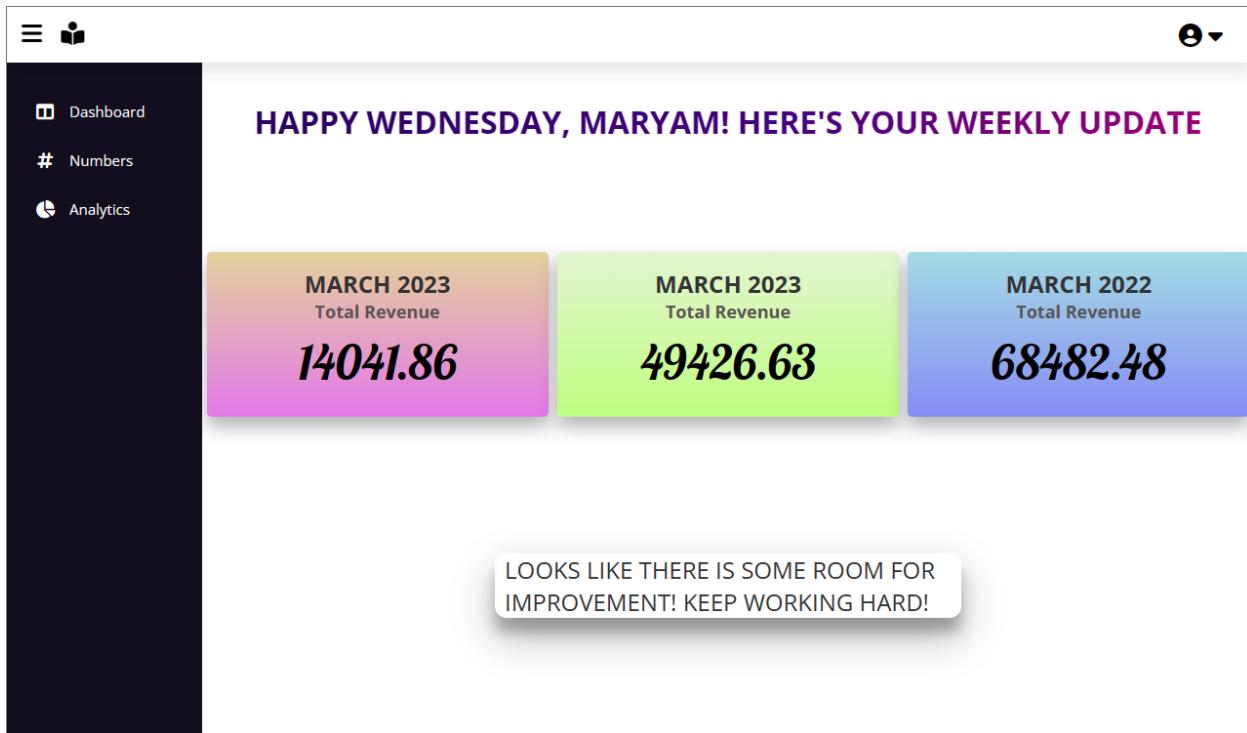
The user who is presently logged in has a welcome message written in the center of the home page. As you can see, we've included some text transition effects here, where the text changes colors as the page loads to make it appear nicer and draw users' attention to the fact that their names are displayed, and the day of the week is also indicated.

The total income generated by the company for this month, the previous month, and this month a year ago is represented by three boxes in a row, each of which is colored differently. Here, we've used various colors to help the boxes stand out more from one another and to make it apparent to the user which total revenue each box is displaying. In order to make these boxes seem higher on the page and draw the user's attention, we also created a box shadow.

The navigation bar shows the links to the Numbers Page, Analysis Page, Monthly Goals PAges and the Upload CSV page. The monthly goals and Upload csv - these 3 pages are exclusive to manager access level.

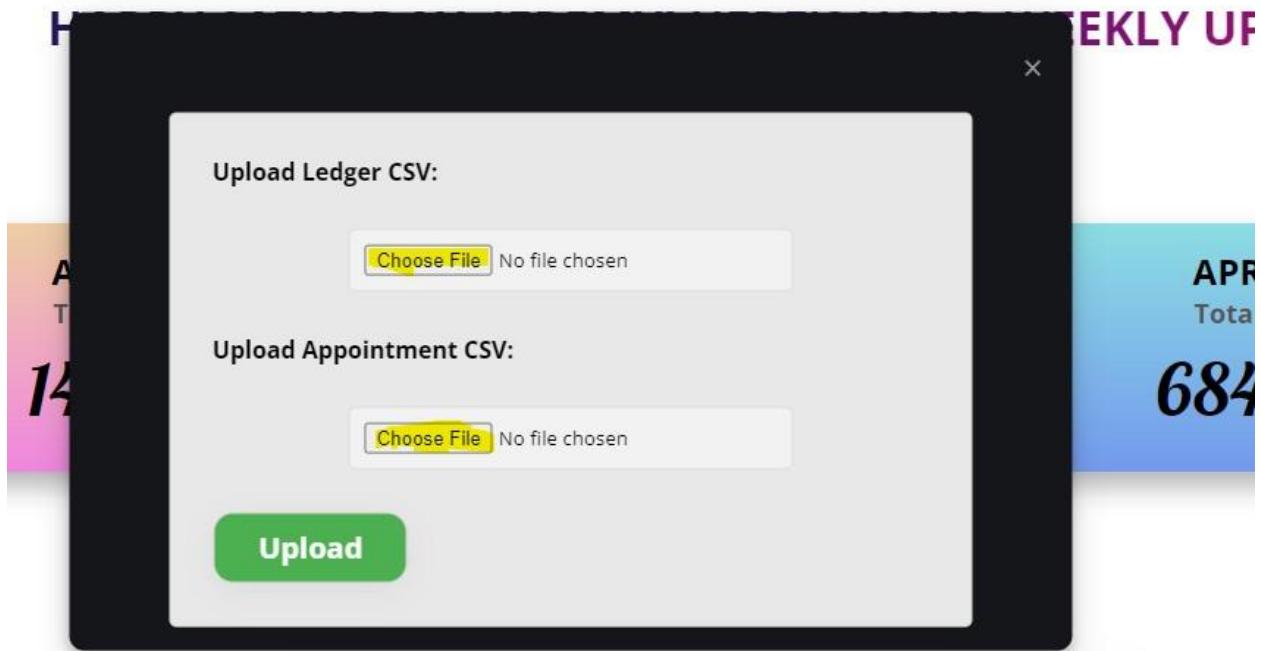
## Main Dashboard Page - Service Provider

### Desktop Version



**About our Main Page design:** -The provider can only see their individual revenue data. And the links to the Numbers Page and the Analysis Page

## Upload CSV - Manager



**About Upload csv link** - This page allows the manager to upload the exported data from the third party application that is used by the client to store their data into our application database in the form of a csv file

## Dashboard Numbers Page - Manager

### Desktop Version

Schedule Report						
User ID	Dentist Name	Date	Start Time	End Time		
SB	Sharon	2023-03-13	07:00:00	12:00:00		
SB	Sharon	2022-11-02	09:30:00	17:15:00		
IM	Isabella	2022-04-26	09:00:00	17:00:00		
ZW	Zuhair	2021-01-04	08:30:00	17:30:00		

**About our Numbers Page design:** - Here is the layout of our Dashboard Numbers page. This page is a part of the analysis of the data. The client wants to see each

provider's available units, downtime units and gross production for each day the clinic was running. Each 'unit' is equal to 10 minutes, this implies that each hour has 6 units. The first column tells us which provider's data it is. The date column is the date of the schedule. The Available units display the total number of hours (in units) the provider was scheduled for. The downtime units are the hours that the provider was "inactive" that is, they did not have either an appointment, lunch, break or a meeting. The gross production shows the total revenue that the provider earned that day. The last column allows the manager to make notes. Only the user type manager can edit the memo column otherwise it is "readonly" feature.

The navigation bar displays the name of all the providers of the clinic. The manager can choose to filter out a particular provider's data by selecting whose data the manager wishes to be displayed on the page.

## Dashboard Numbers Page - Provider

Desktop Version:

	DR	DATE ▾	AVAILABLE UNITS	DOWNTIME UNITS	GROSS PRODUCTION	MEMO
<input type="checkbox"/>	SB	2022-11-02	46.5	15.5	2258	

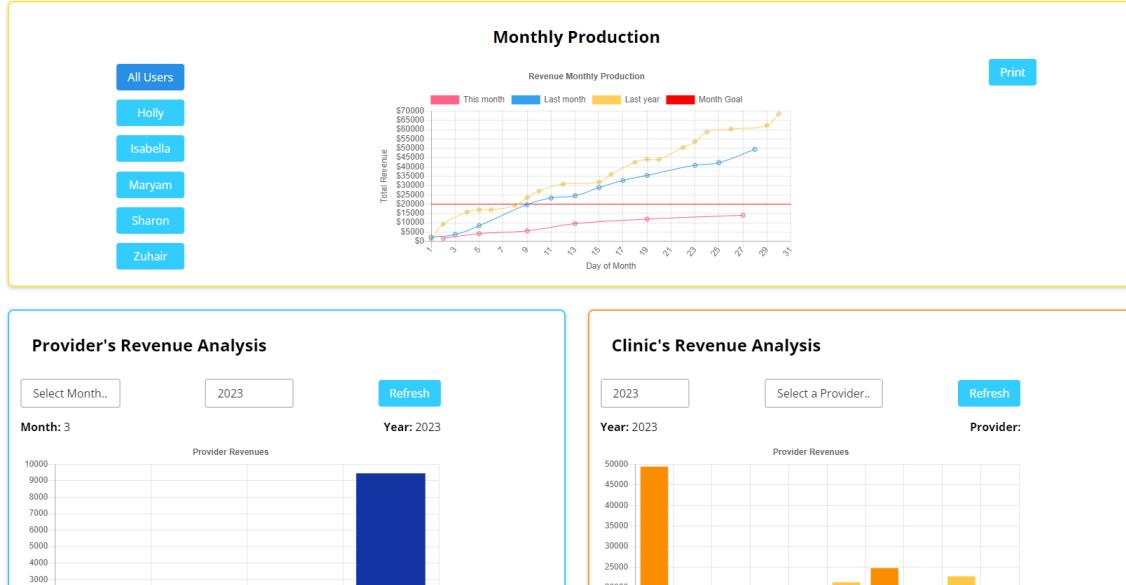
**About our Numbers Page design:** - The provider can not view any other provider's data and only their own data is displayed to them. They are also unable to make any comments on the Number Page.

## Analysis - Manager View

The analysis tab on the navigation bar will be displaying the visualizations of the analysis of the data. We will have 3 major visualizations with the options to filter the data being input, that is, filter out some rows by using dropdowns to give users the option to do so.

1. Multi Line Graph
  - o The graph displays the revenue data trend of the Clinic for Current Month, Previous Month and current Month last year

- Manager can view the data for all the Service Providers. There are buttons provided on the left of the graph for the Manager to view a particular provider's trend individually
  - The print button on the right allows the Manager to print out this graph for the meetings as they wanted
2. Bar Chart 1
- The graph compares monthly revenue of each provider side by side. Each bar represents a service provider
  - The Manager can choose which month and year data they would like to compare and the chart displays that filtered data
3. Bar Chart 2
- The graph compares monthly revenue data for a year for the clinic
  - The Manager can choose a provider name or a particular year, and the chart displays that filtered data



## Analysis - Provider View

The analysis tab on the navigation bar will be displaying the visualizations of the analysis of the data. We will have one visualization for the service provider

1. Multi Line Graph
- The graph displays the revenue data of the logged in user trend of the Clinic for Current Month, Previous Month and current Month last year
  - The user also does NOT have the option to view any other provider's data trend



## Monthly Goal, Add Goal - Manager

### Desktop Version:

Delete Selected Goals

	MONTH	YEAR	GOAL
<input type="checkbox"/>	August	2023	13000
<input type="checkbox"/>	June	2023	70000
<input type="checkbox"/>	March	2023	20000
<input type="checkbox"/>	January	2023	10000
<input type="checkbox"/>	November	2022	5000
<input type="checkbox"/>	October	2022	4000



**About the Monthly Goal and Add Goal Page:** The monthly goal page displays all the Clinic's Monthly Goals that have been added by the Manager. This data is used on the line graph to display the base value which allows the user to check if their clinic reached their goal or not.

This functionality is Manager Exclusive. The Manager can delete an existing goal if they decide to change the goal later on for any reason.

The Add Goals Page allows the Manager to add a new goal for a new month. Note: Two months can NOT have multiple goals. It will print an error if Manager tries to enter another goal for an existing month

## Receptionist View

The user type, Receptionist, has a limited view. They are only allowed to add, edit, delete the schedule of the providers. The timesheet tab on the left displays the forms and fields that allows the user to add the provider's schedule. The Schedule Report tab on the left displays the existing schedule. The page also gives the option to the user to "delete" an existing schedule. This feature is only allowed for schedule for today and future since the old schedule can't be changed.

User ID	Dentist Name	Date	Start Time	End Time	Action
SB	Sharon	2022-11-02	09:30:00	17:15:00	
IM	Isabella	2022-04-26	09:00:00	17:00:00	
ZW	Zuhair	2021-01-04	08:30:00	17:30:00	

The user type, Receptionist, has a limited view. They are only allowed to add, edit, delete the schedule of the providers. The timesheet tab on the left displays the forms and fields that allows the user to add the provider's schedule. The Schedule Report tab on the left displays the existing schedule. The page also gives the option to the user to "delete" an existing schedule. This feature is only allowed for schedule for today and future since the old schedule can't be changed.



# Testing Report

## SIGN UP PAGE

### 1. Test 1:

<b>Test Case: 1</b>	Invalid First/Last Name - Numbers are typed instead of words
<b>Input</b>	FIRST NAME 1256123 <hr/> LAST NAME 215644  <hr/>
<b>Expected Output</b>	Error is shown prompting user to retype First/Last Name
<b>Result</b>	<b>FAIL</b> <b>User was able to input numbers as names and that would break the code.</b> <b>Bug was Fixed:</b>  <b>Sign Up to Story</b>  Error: No Numbers. Only Words are accepted in First Name Column. Please Try Again  Error: No Numbers. Only Words are accepted in Last Name Column. Please Try Again
<b>Pass or Fail?</b>	PASS

### 2. Test 2:

<b>Test Case: 2</b>	Invalid Password - missing capital letter
<b>Input</b>	Password: password@123
<b>Expected Output</b>	Error is shown prompting user to retype password
<b>Result</b>	<p style="text-align: center;"><b>Sign Up to Story</b></p> <p style="color: red; text-align: center;">Password Error: Use Capital Letters, at least a mix of letters. Please Try Again</p>
<b>Pass or Fail?</b>	PASS

### 3. Test 3: -

<b>Test Case: 3</b>	Invalid Password - missing special character
<b>Input</b>	Password: - Password123
<b>Expected Output</b>	Error is shown prompting user to retype password
<b>Result</b>	<p><b>FAIL</b></p> <p style="color: red;"><b>User wasn't told which specific category was missing in the password.</b></p> <p><b>Bug was Fixed:</b></p> <p style="text-align: center;"><b>Sign Up to Story</b></p> <p style="color: red; text-align: center;">Password Error: Use at least 1 special character. Please Try Again</p>
<b>Pass or Fail?</b>	PASS

**4. Test 4: -**

<b>Test Case: 4</b>	Invalid Password - missing number
<b>Input</b>	Password: - Password@
<b>Expected Output</b>	Error is shown prompting user to retype password
<b>Result</b>	<p style="text-align: center;"><b>Sign Up to Story</b></p> <p style="color: red; text-align: center;">Password Error: Use at least 1 number. Please Try Again</p>
<b>Pass or Fail?</b>	PASS

**5. Test 5: -**

<b>Test Case: 5</b>	Invalid Verification Password - does not match entered password
<b>Expected Output</b>	Error is shown prompting user to retype verification password

<b>Test Case: 5</b>	Invalid Verification Password - does not match entered password
<b>Result</b>	<p style="text-align: center;"><b>Sign Up to Story</b></p> <p>Your Password Doesn't Match!</p> <p>FIRST NAME  <input type="text"/></p> <p>LAST NAME  <input type="text"/></p>
<b>Pass or Fail?</b>	PASS

## 6. Test 6: -

<b>Test Case: 6</b>	SQL Query as input - name “SELECT * FROM ledger”
<b>Expected Output</b>	The entered SQL query is not taken as an input, and an error is printed, prompting the user to enter only strings
<b>Result</b>	<p style="text-align: center;"><b>Sign Up to Story</b></p> <p>FIRST NAME  <input type="text"/> Punyaja "SELECT * FROM user_name"</p> <p>LAST NAME  <input type="text"/> Mishra</p> <p>EMAIL ADDRESS  <input type="text"/> punyajamishra@trentu.ca</p> <p>PASSWORD  <input type="text"/> .....</p> <p>For Password: Use at least 8 or more characters with a mix of letters, numbers &amp; symbols</p>

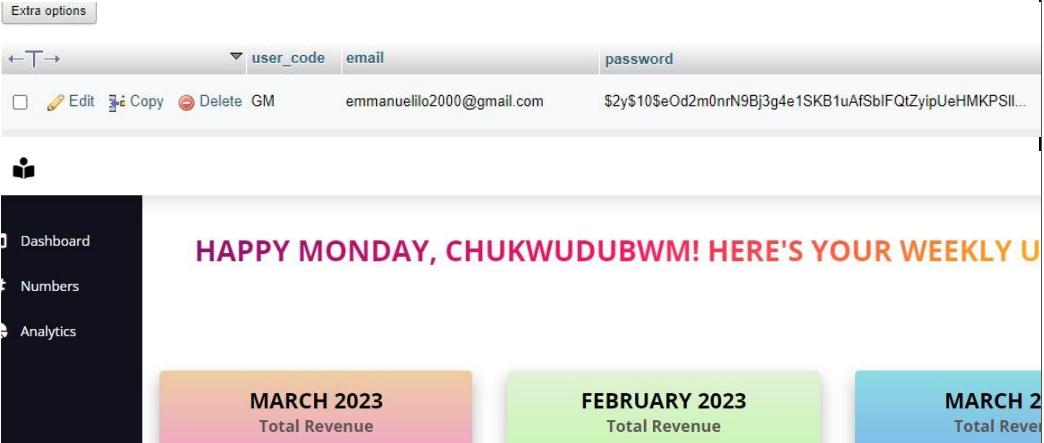
<b>Test Case: 6</b>	SQL Query as input - name “SELECT * FROM ledger”
	<b>Sign Up to Story</b>  Error: No Numbers. Only Words are accepted in First Name Column. Please Try Again
<b>Pass or Fail?</b>	PASS

7. Test 7: -

<b>Test Case: 7</b>	Invalid email address (not of type email)
<b>Expected Output</b>	Error saying user to type in a correct email address
<b>Result</b>	<p><b>FAIL</b>  <b>User was able to create an account without having @ int the input</b>  <b>Bug was Fixed:</b></p> <p>EMAIL ADDRESS  <input type="text" value="sidaksra9"/></p> <p>PASSWORD  <input type="password"/>  <span style="border: 1px solid #ccc; padding: 2px;">! Please include an '@' in the email address. 'sidaksra9' is missing an '@'.</span></p> <p>.....</p> <p><b>After including @</b>  EMAIL ADDRESS  <input type="text" value="sidaksra9@"/></p> <p>PASSWORD  <input type="password"/>  <span style="border: 1px solid #ccc; padding: 2px;">! Please enter a part following '@'. 'sidaksra9@' is incomplete.</span></p> <p>.....</p>

<b>Test Case: 7</b>	Invalid email address (not of type email)
<b>Pass or Fail?</b>	PASS

**8. Test 8: -**

<b>Test Case: 8</b>	All input are entered correctly and submitted
<b>Expected Output</b>	An account will be created and stored in the database, and you can now login
<b>Result</b>	 A screenshot of a web-based application interface. At the top, there is a header with 'user_code' and 'email' fields, both containing 'emmanuellio2000@gmail.com'. Below this is a password field with a long hash value. There are buttons for 'Edit', 'Copy', 'Delete', and 'GM'. To the left, a sidebar menu lists 'Dashboard', 'Numbers', and 'Analytics'. The main content area features a pink banner with the text 'HAPPY MONDAY, CHUKWUDUBWM! HERE'S YOUR WEEKLY U...'. Below the banner are three colored boxes: a pink one for 'MARCH 2023 Total Revenue', a green one for 'FEBRUARY 2023 Total Revenue', and a blue one for 'MARCH 2023 Total Revenue'.
<b>Pass or Fail?</b>	PASS

**9. Test 9: -**

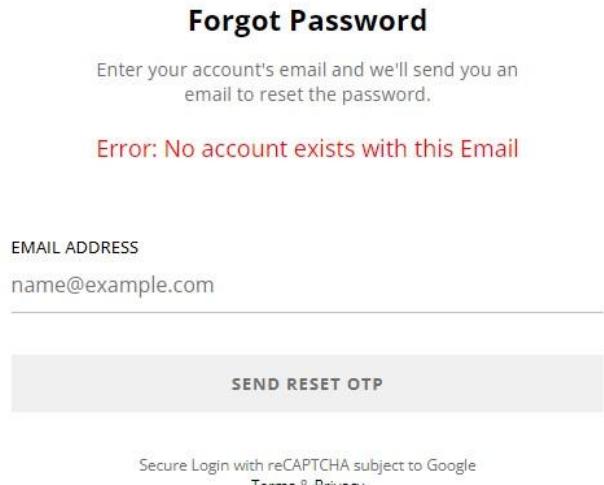
<b>Test Case: 9</b>	Entering the same User Code again to check weather it will create account again or it will show error
<b>Input</b>	USER CODE GM
<b>Expected Output</b>	An account will be created and stored in the database, and you can now login

<b>Test Case: 9</b>	Entering the same User Code again to check weather it will create account again or it will show error
<b>Result</b>	<b>FAIL</b> <b>User was able to use old code's for "User Code" and an account would be created</b> <b>Bug was Fixed:</b> <p style="text-align: center;"><b>Sign Up to Story</b></p> <p style="text-align: center;">The User Code is already registered!. Please Try Again</p>
<b>Pass or Fail?</b>	PASS

## Forgot Password Page

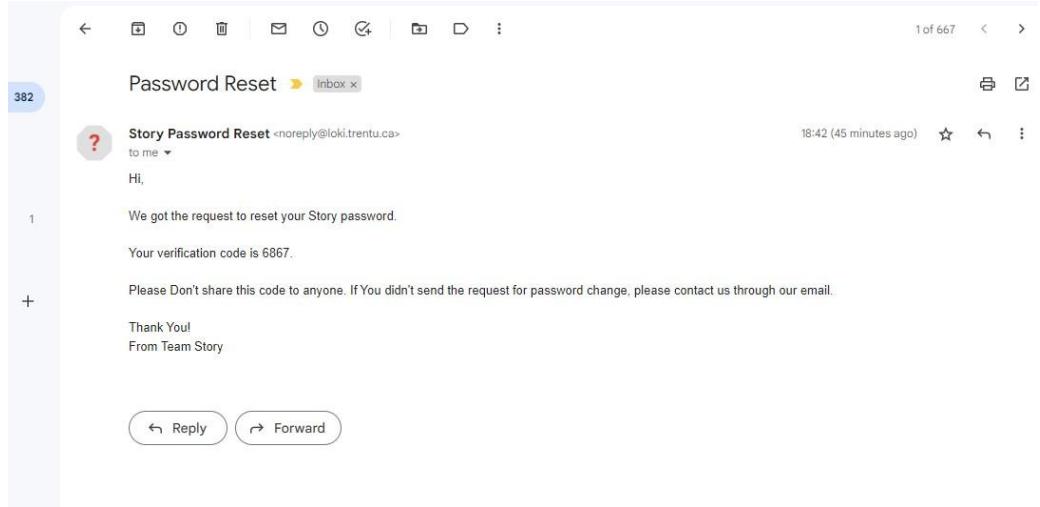
1. Test 1:

<b>Test Case: 1</b>	Invalid email address entered (not of type email)
<b>Expected Output</b>	Error saying user does not have an existing account with that email

<b>Test Case: 1</b>	Invalid email address entered (not of type email)
<b>Result</b>	<p style="text-align: center;"><b>Forgot Password</b></p> <p>Enter your account's email and we'll send you an email to reset the password.</p> <p style="color: red; margin-left: 200px;">Error: No account exists with this Email</p>  <p>Secure Login with reCAPTCHA subject to Google  <a href="#">Terms</a> &amp; <a href="#">Privacy</a></p>
<b>Pass or Fail?</b>	PASS

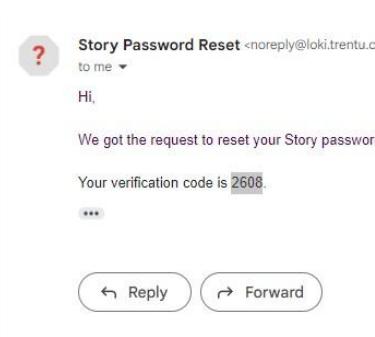
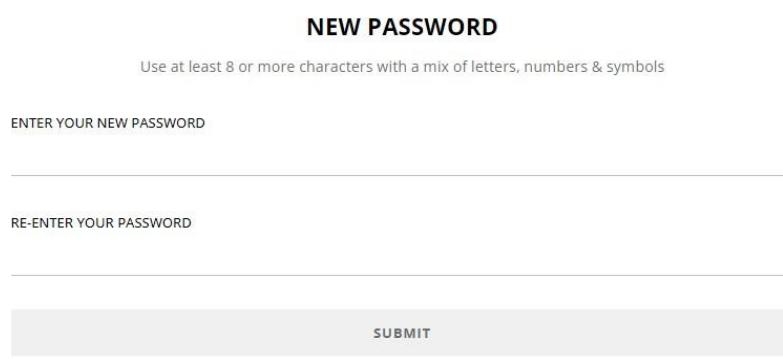
2. Test 2:

<b>Test Case: 2</b>	User receives OTP in their email
<b>Expected Output</b>	An email with your verification code.

<b>Test Case: 2</b>	User receives OTP in their email
<b>Result</b>	 <p>The screenshot shows an email inbox with one unread message. The message is from "Story Password Reset &lt;noreply@loki.trentu.ca&gt;" and is titled "Password Reset". The body of the email reads:</p> <p>Hi, We got the request to reset your Story password. Your verification code is 6867. Please Don't share this code to anyone. If You didn't send the request for password change, please contact us through our email. Thank You From Team Story</p> <p>At the bottom of the email view, there are two buttons: "Reply" and "Forward".</p>
<b>Pass or Fail?</b>	PASS

## Reset Password Page

1. Test 1:

<b>Test Case: 1</b>	OTP Received in the email works and allows user to reset password
<b>Expected Output</b>	An email with your verification code that needs to be type to be taken to the reset password page
<b>Result</b>	 <p>The screenshot shows an email from "Story Password Reset &lt;noreply@loki.trentu.ca&gt;" sent "to me" at 19:36 (0 minutes ago). The email body contains:</p> <p>Hi,</p> <p>We got the request to reset your Story password.</p> <p>Your verification code is 2608.</p> <p>***</p> <p>At the bottom are "Reply" and "Forward" buttons.</p>  <p>The screenshot shows a password reset form titled "NEW PASSWORD". It includes fields for "ENTER YOUR NEW PASSWORD" and "RE-ENTER YOUR PASSWORD", both currently empty. A "SUBMIT" button is at the bottom. Below the form, a note states: "Secure Login with reCAPTCHA subject to Google <a href="#">Terms &amp; Privacy</a>".</p>
<b>Pass or Fail?</b>	PASS

## 2. Test 2:

<b>Test Case: 2</b>	Invalid Password - missing capital letter
<b>Expected Output</b>	Error is shown prompting user to retype password
<b>Result</b>	<p style="text-align: center;"><b>NEW PASSWORD</b></p> <p style="text-align: center;">Use at least 8 or more characters with a mix of letters, numbers &amp; symbols</p> <p style="text-align: center; color: red;">Your Password Must Contain At Least 1 Capital Letter!</p> <p style="text-align: center;">ENTER YOUR NEW PASSWORD</p> <hr/> <p style="text-align: center;">RE-ENTER YOUR PASSWORD</p> <hr/> <p style="text-align: center;">SUBMIT</p>
<b>Pass or Fail?</b>	PASS

### 3. Test 3:

<b>Test Case: 3</b>	Invalid Password - missing special character
<b>Expected Output</b>	Error is shown prompting user to retype password

<b>Test Case: 3</b>	Invalid Password - missing special character
<b>Result</b>	<p style="text-align: center;"><b>NEW PASSWORD</b></p> <p style="text-align: center;">Use at least 8 or more characters with a mix of letters, numbers &amp; symbols</p> <p style="text-align: center; color: red;">Your Password Must Contain symbols!</p> <p style="text-align: center;">ENTER YOUR NEW PASSWORD</p> <hr/> <p style="text-align: center;">RE-ENTER YOUR PASSWORD</p> <hr/> <p style="text-align: right; background-color: #e0e0e0; padding: 5px;">SUBMIT</p>
<b>Pass or Fail?</b>	PASS

#### 4. Test 4:

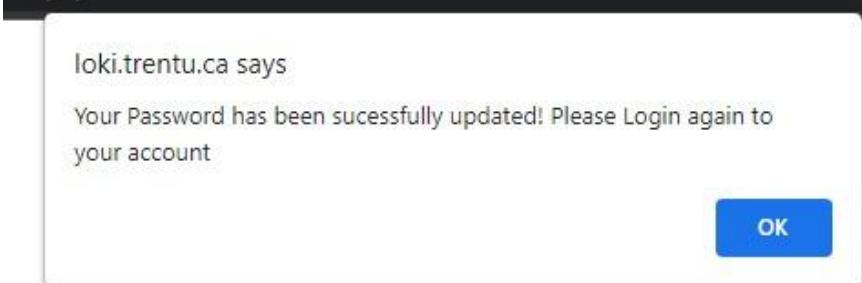
<b>Test Case: 4</b>	Invalid Password - missing number
<b>Expected Output</b>	Error is shown prompting user to retype password

<b>Test Case: 4</b>	Invalid Password - missing number
<b>Result</b>	<p style="text-align: center;"><b>NEW PASSWORD</b></p> <p style="text-align: center;">Use at least 8 or more characters with a mix of letters, numbers &amp; symbols</p> <p style="text-align: center; color: red;">Your Password Must Contain At Least 1 Number!</p> <p style="text-align: center;">ENTER YOUR NEW PASSWORD</p> <hr/> <p style="text-align: center;">RE-ENTER YOUR PASSWORD</p> <hr/> <p style="text-align: center;">SUBMIT</p> <p style="text-align: center; font-size: small;">Secure Login with reCAPTCHA subject to Google <a href="#">Terms</a> &amp; <a href="#">Privacy</a></p>
<b>Pass or Fail?</b>	PASS

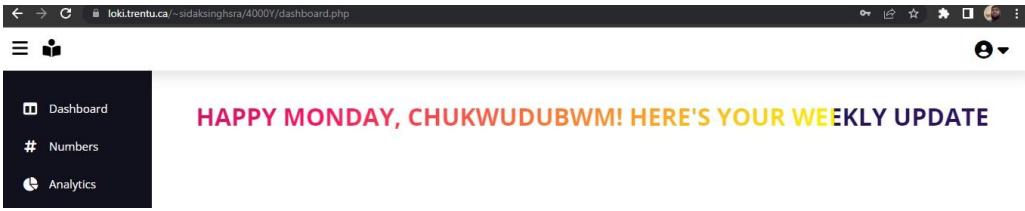
=

### 5. Test 5:

<b>Test Case: 5</b>	Password is reset successfully
<b>Expected Output</b>	Password is changed successfully

<b>Test Case: 5</b>	Password is reset successfully
<b>Result</b>	
<b>Pass or Fail?</b>	PASS

#### 6. Test 6:

<b>Test Case: 6</b>	User can log in using new reset password
<b>Expected Output</b>	User can now login in with there newly changed password
<b>Result</b>	
<b>Pass or Fail?</b>	PASS

## Login Page

1. Test 1:

<b>Test Case: 1</b>	Wrong email address entered
<b>Expected Output</b>	Error saying invalid email was entered
<b>Result</b>	 <p>The screenshot shows a login form with fields for 'EMAIL ADDRESS' containing 'sidaksinghsra' and 'PASSWORD' containing '.....'. A red error message 'Error: Invalid Email' is displayed above the 'SIGN IN' button.</p>
<b>Pass or Fail?</b>	PASS

2. Test 2:

<b>Test Case: 2</b>	Wrong password entered
<b>Expected Output</b>	Error saying invalid password was entered

<b>Test Case: 2</b>	Wrong password entered
<b>Result</b>	<p>EMAIL ADDRESS</p> <input type="text" value="sidaksinghsra"/>
	<p>PASSWORD</p> <input type="password" value="....."/> <p>Error: Invalid Password</p> <p>SIGN IN</p>

### 3. Test 3:

<b>Test Case: 3</b>	SQL Query entered as input - email “SELECT * FROM user_name WHERE role = 1”
<b>Expected Output</b>	Error saying invalid email was entered

<b>Test Case: 3</b>	SQL Query entered as input - email “SELECT * FROM user_name WHERE role = 1”
<b>Result</b>	 <p>A screenshot of a login interface. At the top, there is a text input field with placeholder text "Email or phone number". Below it is a password input field labeled "PASSWORD" with placeholder text "Password" and a series of dots representing the typed password. A red error message "Error: Invalid Email" is displayed above the "SIGN IN" button. In the bottom right corner of the page, there is a link "CAN'T LOG IN?".</p>
<b>Pass or Fail?</b>	PASS

#### 4. Test 4:

<b>Test Case: 4</b>	Correct username and password combination entered
<b>Expected Output</b>	Access is granted into your account

<b>Test Case: 4</b>	Correct username and password combination entered
<b>Result</b>	<p>The screenshot shows a web browser displaying a dashboard page. On the left is a dark sidebar with navigation links: Dashboard, Numbers, and Analytics. The main area has a heading "HAPPY MONDAY, CHUKWUDUBWM! HERE'S YOUR WEEKLY UPDATE". Below this are three colored cards: an orange card for "MARCH 2023" showing "Total Revenue" and "NONE"; a green card for "FEBRUARY 2023" showing "Total Revenue" and "NONE"; and a blue card for "MARCH 2022" showing "Total Revenue" and "NONE". At the bottom, a white box contains the text "NO REVENUE DATA AVAILABLE FOR THIS MONTH".</p>
<b>Pass or Fail?</b>	PASS

## Dashboard Page (Landing Page)

1. Test 1:

<b>Test Case: 1</b>	Navigation Bar on the left is displayed as per access level - Manager
<b>Expected Output</b>	6 links are displayed, Dashboard, Numbers, Analytics, Monthly Goals, Add Goals, Upload CSV
<b>Result</b>	

<b>Test Case: 1</b>	Navigation Bar on the left is displayed as per access level - Manager
<b>Pass or Fail?</b>	PASS

## 2. Test 2:

<b>Test Case: 2</b>	Navigation Bar on the left is displayed as per access level - Providers
<b>Expected Output</b>	Only 3 links - Dashboard, Numbers, Analytics are displayed
<b>Result</b>	

<b>Test Case: 2</b>	Navigation Bar on the left is displayed as per access level - Providers
<b>Pass or Fail?</b>	PASS

3. Test 3:

<b>Test Case: 3</b>	Dashboard Landing Page loads after logging in
<b>Expected Output</b>	Good morning message is displayed on the top when logged in along with user's name
<b>Result</b>	HAPPY FRIDAY, TESTMANAGER! HERE'S YOUR CLINIC WEEKLY UPDATE
<b>Pass or Fail?</b>	PASS

4. Test 4:

<b>Test Case: 4</b>	3 boxes are displayed under the top message when page loads			
<b>Expected Output</b>	boxes contain revenue numbers or "None"			
<b>Result</b>	<p>HAPPY FRIDAY, TESTMANAGER! HERE'S YOUR CLINIC WEEKLY UPDATE</p> <table border="1"> <tr> <td>MARCH 2023 Total Revenue <b>14041.86</b></td> <td>FEBRUARY 2023 Total Revenue <b>49426.63</b></td> <td>MARCH 2022 Total Revenue <b>43970.59</b></td> </tr> </table>	MARCH 2023 Total Revenue <b>14041.86</b>	FEBRUARY 2023 Total Revenue <b>49426.63</b>	MARCH 2022 Total Revenue <b>43970.59</b>
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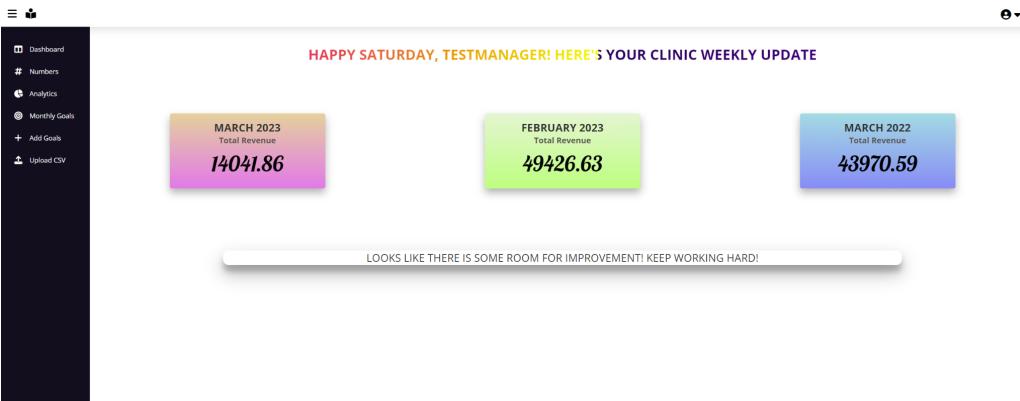
<b>Test Case: 4</b>	3 boxes are displayed under the top message when page loads
<b>Pass or Fail?</b>	PASS

5. Test 5:

<b>Test Case: 5</b>	A message displayed under the boxes depending on the conditions
<b>Expected Output</b>	<ul style="list-style-type: none"> <li>First half of month and revenue is less than monthly goal; Message: "The month has just started, let's keep going!"</li> <li>Second half of month and revenue is less than monthly goal; Message: "Looks like there is some room for improvement. Keep Working hard!"</li> <li>Revenue is greater than or equal to monthly goal; Message : "Looks like you are having a good month"</li> <li>No data in database; Message : "No Revenue data available for this month"</li> </ul>
<b>Result</b>	<p>14041.86      49426.63      43970.59</p> <p>LOOKS LIKE THERE IS SOME ROOM FOR IMPROVEMENT! KEEP WORKING HARD!</p>
<b>Pass or Fail?</b>	PASS

## Dashboard Page - Manager Access Level

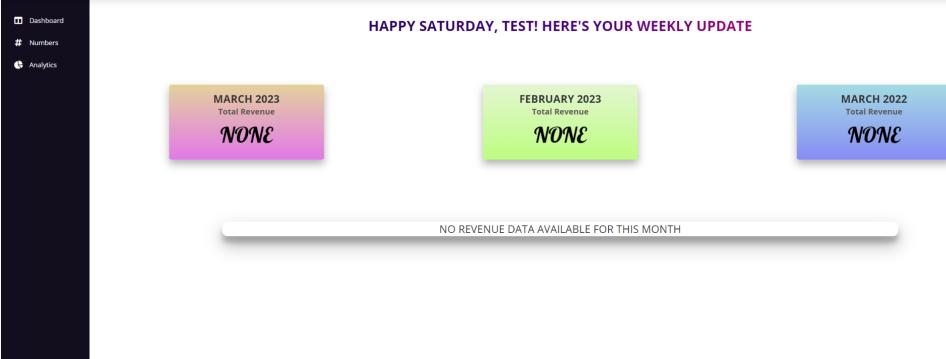
1. Test 1:

<b>Test Case: 1</b>	User logged in is a Manager or General Manager
<b>Expected Output</b>	The appropriate information is displayed based on the access level
<b>Result</b>	
<b>Pass or Fail?</b>	PASS

## Dashboard Page - Providers Access Level

1. Test 1:

<b>Test Case: 1</b>	User logged in is not Manager or General Manager
<b>Expected Output</b>	The appropriate information is displayed based on the access level

<b>Test Case: 1</b>	User logged in is not Manager or General Manager
<b>Result</b>	 <p>HAPPY SATURDAY, TEST! HERE'S YOUR WEEKLY UPDATE</p> <p>MARCH 2023 Total Revenue <b>NONE</b></p> <p>FEBRUARY 2023 Total Revenue <b>NONE</b></p> <p>MARCH 2022 Total Revenue <b>NONE</b></p> <p>NO REVENUE DATA AVAILABLE FOR THIS MONTH</p>
<b>Pass or Fail?</b>	PASS

## Numbers Page

### 1. Test 1:

<b>Test Case: 1</b>	2 buttons are displayed when Numbers Page loads
<b>Expected Output</b>	One button for Submitting Changes and one button for Refreshing page
<b>Result</b>	 <p>Submit Changes</p> <p>Refresh Page Imports</p>

<b>Test Case: 1</b>	2 buttons are displayed when Numbers Page loads
<b>Pass or Fail?</b>	PASS

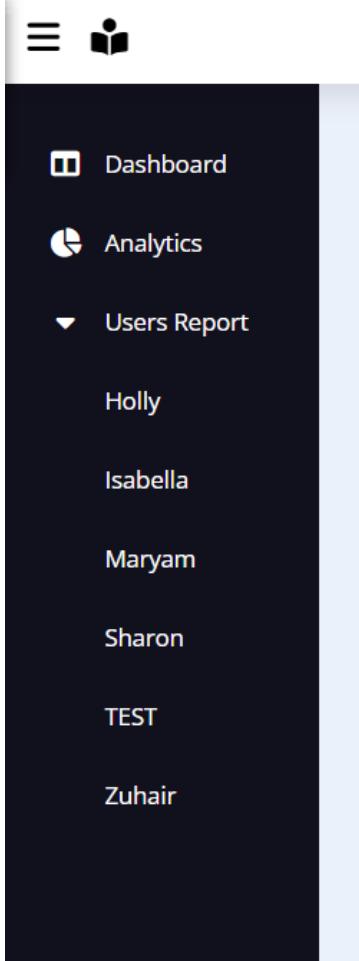
**2. Test 2:**

<b>Test Case: 2</b>	A table is displayed with analytical data																																																	
<b>Expected Output</b>	7 columns - checkbox to select rows, provider's name, date of the row's data, available units, downtime units, gross production, memo																																																	
<b>Result</b>	<table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>DR</th> <th>DATE ▾</th> <th>AVAILABLE UNITS</th> <th>DOWNTIME UNITS</th> <th>GROSS PRODUCTION</th> <th>MEMO</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>IM</td> <td>2023-03-15</td> <td>72</td> <td>72</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>HM</td> <td>2023-03-14</td> <td>72</td> <td>72</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>SB</td> <td>2022-11-02</td> <td>46.5</td> <td>46.5</td> <td>1129</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>MY</td> <td>2022-10-08</td> <td>60</td> <td>42</td> <td></td> <td>busy day</td> </tr> <tr> <td><input type="checkbox"/></td> <td>IM</td> <td>2022-04-26</td> <td>48</td> <td>48</td> <td>1171.0299987793</td> <td>test</td> </tr> <tr> <td><input type="checkbox"/></td> <td>ZW</td> <td>2021-01-04</td> <td>54</td> <td>54</td> <td></td> <td></td> </tr> </tbody> </table>	<input type="checkbox"/>	DR	DATE ▾	AVAILABLE UNITS	DOWNTIME UNITS	GROSS PRODUCTION	MEMO	<input type="checkbox"/>	IM	2023-03-15	72	72			<input type="checkbox"/>	HM	2023-03-14	72	72			<input type="checkbox"/>	SB	2022-11-02	46.5	46.5	1129		<input type="checkbox"/>	MY	2022-10-08	60	42		busy day	<input type="checkbox"/>	IM	2022-04-26	48	48	1171.0299987793	test	<input type="checkbox"/>	ZW	2021-01-04	54	54		
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<b>Pass or Fail?</b>	PASS																																																	

## Numbers Page - Manager Access Level

**1. Test 1:**

<b>Test Case: 1</b>	Navigation Bar displays Manager Access Level View
<b>Expected Output</b>	All user's name is displayed for individual provider's data

<b>Test Case: 1</b>	Navigation Bar displays Manager Access Level View
<b>Result</b>	
<b>Pass or Fail?</b>	PASS

2. Test 2:

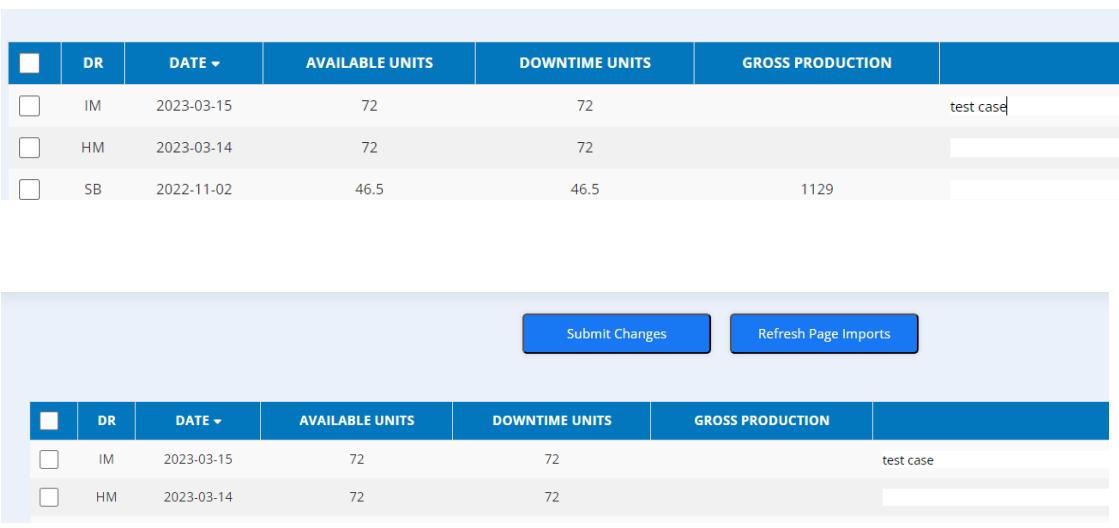
<b>Test Case: 2</b>	Analytical Data displayed in table is of manager access level
<b>Expected Output</b>	Table shows the data of each and every provider

<b>Test Case: 2</b>	Analytical Data displayed in table is of manager access level																																																	
<b>Result</b>	<table border="1"> <thead> <tr> <th></th><th>DR</th><th>DATE ▾</th><th>AVAILABLE UNITS</th><th>DOWNTIME UNITS</th><th>GROSS PRODUCTION</th><th>MEMO</th></tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td><td>IM</td><td>2023-03-15</td><td>72</td><td>72</td><td></td><td></td></tr> <tr> <td><input type="checkbox"/></td><td>HM</td><td>2023-03-14</td><td>72</td><td>72</td><td></td><td></td></tr> <tr> <td><input type="checkbox"/></td><td>SB</td><td>2022-11-02</td><td>46.5</td><td>46.5</td><td>1129</td><td></td></tr> <tr> <td><input type="checkbox"/></td><td>MY</td><td>2022-10-08</td><td>60</td><td>42</td><td></td><td>busy day</td></tr> <tr> <td><input type="checkbox"/></td><td>IM</td><td>2022-04-26</td><td>48</td><td>48</td><td>1171.0299987793</td><td>test</td></tr> <tr> <td><input type="checkbox"/></td><td>ZW</td><td>2021-01-04</td><td>54</td><td>54</td><td></td><td></td></tr> </tbody> </table>		DR	DATE ▾	AVAILABLE UNITS	DOWNTIME UNITS	GROSS PRODUCTION	MEMO	<input type="checkbox"/>	IM	2023-03-15	72	72			<input type="checkbox"/>	HM	2023-03-14	72	72			<input type="checkbox"/>	SB	2022-11-02	46.5	46.5	1129		<input type="checkbox"/>	MY	2022-10-08	60	42		busy day	<input type="checkbox"/>	IM	2022-04-26	48	48	1171.0299987793	test	<input type="checkbox"/>	ZW	2021-01-04	54	54		
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<b>Pass or Fail?</b>	PASS																																																	

### 3. Test 3:

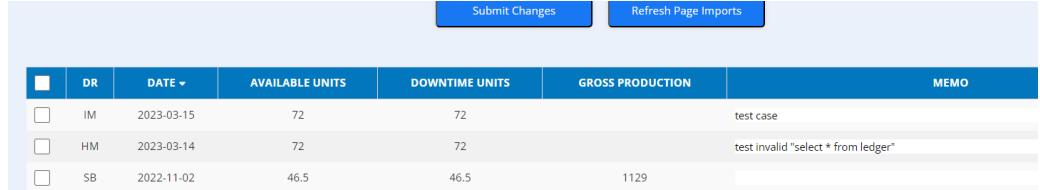
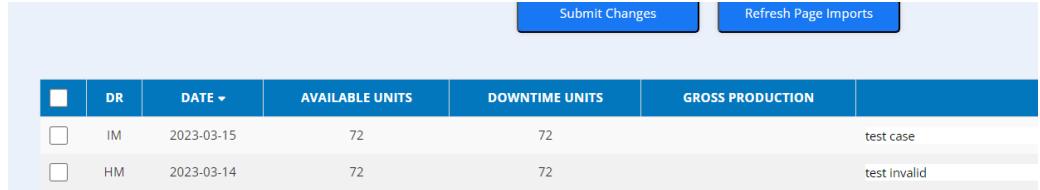
<b>Test Case: 3</b>	Manager (User) clicks on one of the names displayed on navigation bar														
<b>Expected Output</b>	When a provider's name is clicked, data for only that provider is displayed														
<b>Result</b>	 <table border="1"> <thead> <tr> <th></th><th>DR</th><th>DATE ▾</th><th>AVAILABLE UNITS</th><th>DOWNTIME UNITS</th><th>GROSS PRODUCTION</th><th>MEMO</th></tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td><td>ZW</td><td>2021-01-04</td><td>54</td><td>54</td><td></td><td></td></tr> </tbody> </table>		DR	DATE ▾	AVAILABLE UNITS	DOWNTIME UNITS	GROSS PRODUCTION	MEMO	<input type="checkbox"/>	ZW	2021-01-04	54	54		
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<input type="checkbox"/>	ZW	2021-01-04	54	54											
<b>Pass or Fail?</b>	PASS														

4. Test 4:

<b>Test Case: 4</b>	Manager (User) enters comment in “Memo” field																												
<b>Expected Output</b>	Manager as a user is allowed to edit the memo field and the changes get saved in the database when ‘Submit Changes’ button is pressed																												
<b>Result</b>	 <table border="1"> <thead> <tr> <th></th> <th>DR</th> <th>DATE ▾</th> <th>AVAILABLE UNITS</th> <th>DOWNTIME UNITS</th> <th>GROSS PRODUCTION</th> <th></th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>IM</td> <td>2023-03-15</td> <td>72</td> <td>72</td> <td>1129</td> <td>test case</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HM</td> <td>2023-03-14</td> <td>72</td> <td>72</td> <td>0</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>SB</td> <td>2022-11-02</td> <td>46.5</td> <td>46.5</td> <td>1129</td> <td></td> </tr> </tbody> </table> <div style="text-align: center;"> <input type="button" value="Submit Changes"/> <input type="button" value="Refresh Page Imports"/> </div>		DR	DATE ▾	AVAILABLE UNITS	DOWNTIME UNITS	GROSS PRODUCTION		<input type="checkbox"/>	IM	2023-03-15	72	72	1129	test case	<input type="checkbox"/>	HM	2023-03-14	72	72	0		<input type="checkbox"/>	SB	2022-11-02	46.5	46.5	1129	
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<b>Pass or Fail?</b>	PASS																												

5. Test 5:

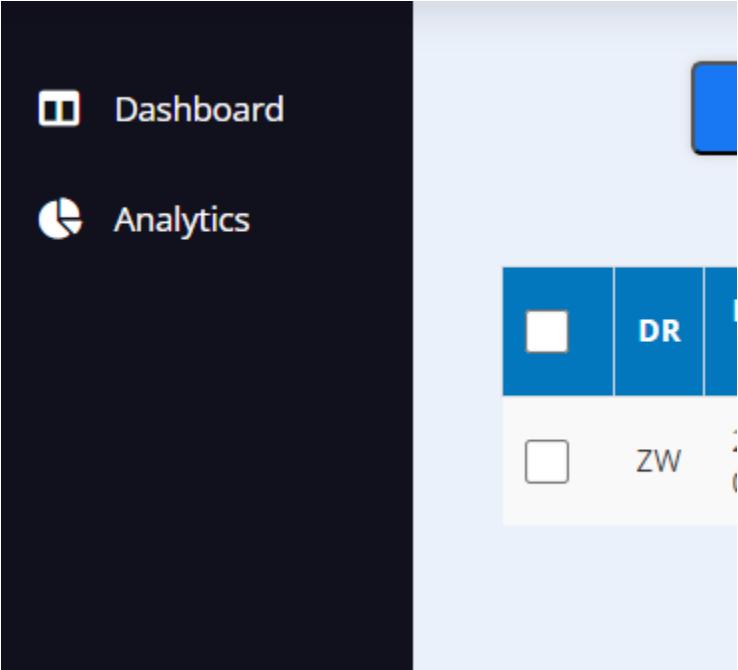
<b>Test Case: 5</b>	Manager (User) enters SQL Query as comment in “Memo” Field (Invalid input)
<b>Expected Output</b>	the input should be filtered out and only valid string field text should be saved
<b>Result</b>	

<b>Test Case: 5</b>	Manager (User) enters SQL Query as comment in “Memo” Field (Invalid input)
	 
<b>Pass or Fail?</b>	PASS

## Numbers Page - Providers Access Level

### 1. Test 1:

<b>Test Case: 1</b>	Navigation Bar displays Providers Access Level View
<b>Expected Output</b>	No provider names are displayed
<b>Result</b>	

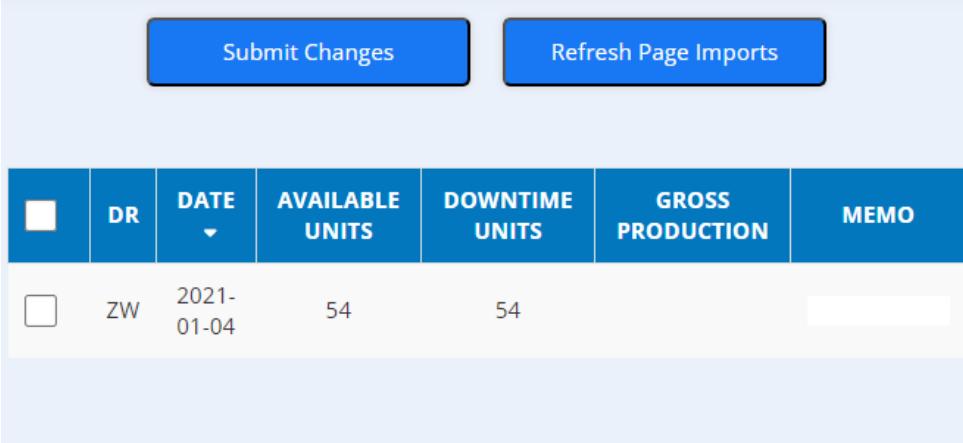
<b>Test Case: 1</b>	Navigation Bar displays Providers Access Level View
	
<b>Pass or Fail?</b>	PASS

2. Test 2:

<b>Test Case: 2</b>	Analytical Data displayed in table is of Provider access level	
<b>Expected Output</b>	Data displayed is only that provider's data	
<b>Result</b>		

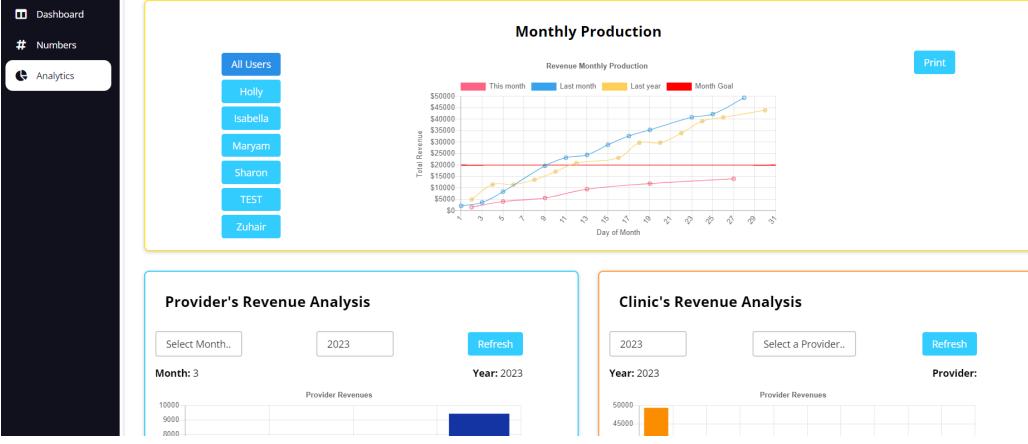
<b>Test Case: 2</b>	Analytical Data displayed in table is of Provider access level
<b>Pass or Fail?</b>	PASS

**3. Test 3:**

<b>Test Case: 3</b>	Provider (User) tries to enter comment in “Memo” Field
<b>Expected Output</b>	User can't edit, as user has ‘readonly’ access
<b>Result</b>	
<b>Pass or Fail?</b>	PASS

## Analytics Page

### 1. Test 1:

<b>Test Case: 1</b>	Graphs are displayed when page loads
<b>Expected Output</b>	Graph loads with current month's data
<b>Result</b>	 <p>The screenshot displays the Analytics page interface. On the left, there is a sidebar with navigation links: Dashboard, Numbers, and Analytics (which is currently selected). Below the sidebar, a list of users is shown: All Users, Holly, Isabella, Maryam, Sharon, TEST, and Zuhair. The main content area contains three distinct sections:</p> <ul style="list-style-type: none"> <li><b>Monthly Production:</b> A line graph titled "Revenue Monthly Production" showing total revenue over the day of the month. It compares "This month" (red line with circles), "Last month" (blue line with diamonds), "Last year" (yellow line with triangles), and "Month Goal" (horizontal red line at approximately \$17,000).</li> <li><b>Provider's Revenue Analysis:</b> A chart showing provider revenues for March 2023. It includes a dropdown for "Select Month...", a date input for "2023", a "Refresh" button, and a status message "Year: 2023". The chart shows a single bar for March 2023 with a value of 9,000.</li> <li><b>Clinic's Revenue Analysis:</b> A chart showing clinic revenues for 2023. It includes a dropdown for "Select a Provider..", a date input for "2023", a "Refresh" button, and a status message "Provider:". The chart shows a single bar for 2023 with a value of 45,000.</li> </ul>
<b>Pass or Fail?</b>	PASS

### 2. Test 2:

<b>Test Case: 2</b>	Print button is clicked
<b>Expected Output</b>	Print dialog opens that allows user to print the line graph

<b>Test Case: 2</b>	Print button is clicked		
<b>Result</b>			
<b>Pass or Fail?</b>	PASS		

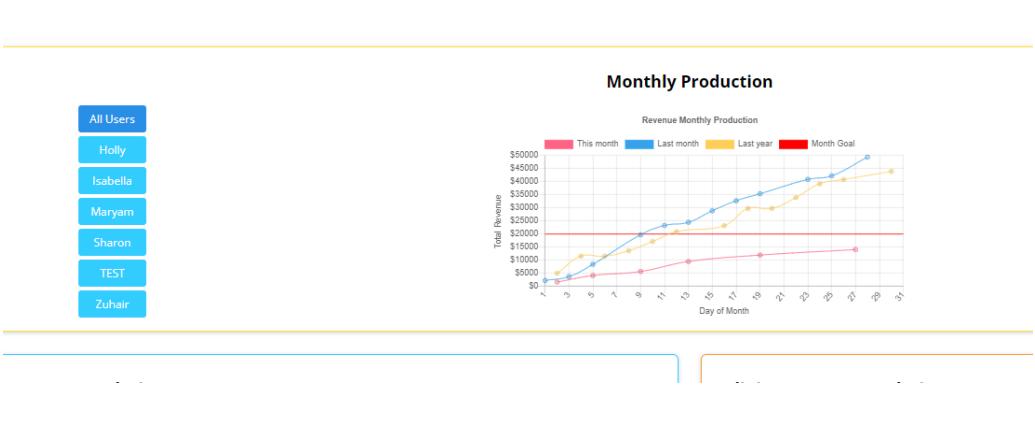
## Analytics Page - Manager Access Level

1. Test 1:

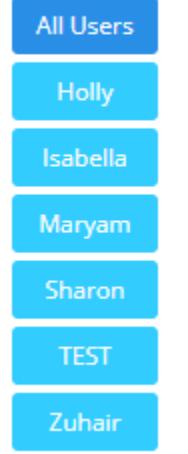
<b>Test Case: 1</b>	Manager Access Level View
<b>Expected Output</b>	3 graphs are displayed - 1 line graph and 2 bar graphs
<b>Result</b>	

Test Case: 1	Manager Access Level View
	 <p>The screenshot displays the Manager Access Level View. At the top right is a "Print" button. On the left, a sidebar lists users: All Users, Holly, Isabella, Maryam, Sharon, TEST, and Zuhair. The main area contains three charts:</p> <ul style="list-style-type: none"> <li><b>Monthly Production:</b> A line chart titled "Revenue Monthly Production" showing total revenue over 30 days. It includes four lines: This month (pink), Last month (blue), Last year (yellow), and Month Goal (red). The Y-axis ranges from \$0 to \$50,000.</li> <li><b>Provider's Revenue Analysis:</b> A bar chart titled "Provider Revenues" for the year 2023. It shows revenue for providers Guest, IM, MY, and ZW. The Y-axis ranges from \$0 to 10,000.</li> <li><b>Clinic's Revenue Analysis:</b> A bar chart titled "Provider Revenues" for the year 2023. It shows revenue for providers 2, 3, 4, 5, 6, 7, 8, 9, 10, and 11. The Y-axis ranges from \$0 to 50,000.</li> </ul>
Pass or Fail?	PASS

## 2. Test 2:

Test Case: 2	Button "All Users" displayed on left are clicked
Expected Output	All user's data are displayed as integration (total clinic's revenue)
Result	 <p>The screenshot shows the Manager Access Level View with the "All Users" button selected in the sidebar. The main area displays integrated data across all charts, showing the total clinic's revenue for all users combined.</p>
Pass or Fail?	PASS

**3. Test 3:**

<b>Test Case: 3</b>	Buttons displayed have provider names
<b>Expected Output</b>	Names of all the provider's working in the clinic are displayed (all in database)
<b>Result</b>	
<b>Pass or Fail?</b>	PASS

**4. Test 4:**

<b>Test Case: 4</b>	Buttons displayed on left are clicked
<b>Expected Output</b>	When a provider is clicked, only that provider's data is displayed as the graph
<b>Result</b>	

<b>Test Case: 4</b>	Buttons displayed on left are clicked
	<p>Monthly Production</p> <p>Revenue Monthly Production</p> <p>This month   Last month   Last year   Month Goal</p> <p>Total Revenue</p> <p>Day of Month</p> <p>All Users Holly Isabella Maryam Sharon TEST Zuhair</p>
<b>Pass or Fail?</b>	PASS

##### 5. Test 5:

<b>Test Case: 5</b>	User chooses a value on Bottom Left Graph dropdowns and hits refresh button												
<b>Expected Output</b>	The bar graph is displayed for the selected month and year's data												
<b>Result</b>	<p>February 2023</p> <p><b>Provider's Revenue Analysis</b></p> <p>Select Month..      2023      Refresh</p> <p>Month: 02      Year: 2023</p> <p>Provider Revenues</p> <table border="1"> <thead> <tr> <th>Category</th> <th>Revenue</th> </tr> </thead> <tbody> <tr> <td>Guest</td> <td>~2,000</td> </tr> <tr> <td>IM</td> <td>~7,000</td> </tr> <tr> <td>MY</td> <td>~5,000</td> </tr> <tr> <td>SB</td> <td>~6,000</td> </tr> <tr> <td>ZW</td> <td>~28,000</td> </tr> </tbody> </table>	Category	Revenue	Guest	~2,000	IM	~7,000	MY	~5,000	SB	~6,000	ZW	~28,000
Category	Revenue												
Guest	~2,000												
IM	~7,000												
MY	~5,000												
SB	~6,000												
ZW	~28,000												

<b>Test Case: 5</b>	User chooses a value on Bottom Left Graph dropdowns and hits refresh button
<b>Pass or Fail?</b>	PASS

**6. Test 6:**

<b>Test Case: 6</b>	User chooses values on Bottom Right Graph dropdowns and hits refresh button																				
<b>Expected Output</b>	The bar graph is displayed for the selected year and provider's data																				
<b>Result</b>	<div style="display: flex; justify-content: space-around; align-items: center;"> <span>2023</span> <span>Select a Provider..</span> <span>Refresh</span> </div> <p>Year: 2023                                  Provider: SB</p> <p>The bar chart displays provider revenues for the year 2023. The y-axis represents revenue in thousands, ranging from 0 to 7000. The x-axis lists provider identifiers: 2, 5, 6, 7, 8, 9, 10, and 11. The chart shows the following approximate data points:</p> <table border="1"> <thead> <tr> <th>Provider</th> <th>Revenue (Thousands)</th> </tr> </thead> <tbody> <tr> <td>2</td> <td>6100</td> </tr> <tr> <td>5</td> <td>1300</td> </tr> <tr> <td>6</td> <td>1100</td> </tr> <tr> <td>7</td> <td>3200</td> </tr> <tr> <td>8</td> <td>2400</td> </tr> <tr> <td>9</td> <td>1900</td> </tr> <tr> <td>10</td> <td>1000</td> </tr> <tr> <td>11</td> <td>4800</td> </tr> </tbody> </table>			Provider	Revenue (Thousands)	2	6100	5	1300	6	1100	7	3200	8	2400	9	1900	10	1000	11	4800
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10	1000																				
11	4800																				
<b>Pass or Fail?</b>	PASS																				

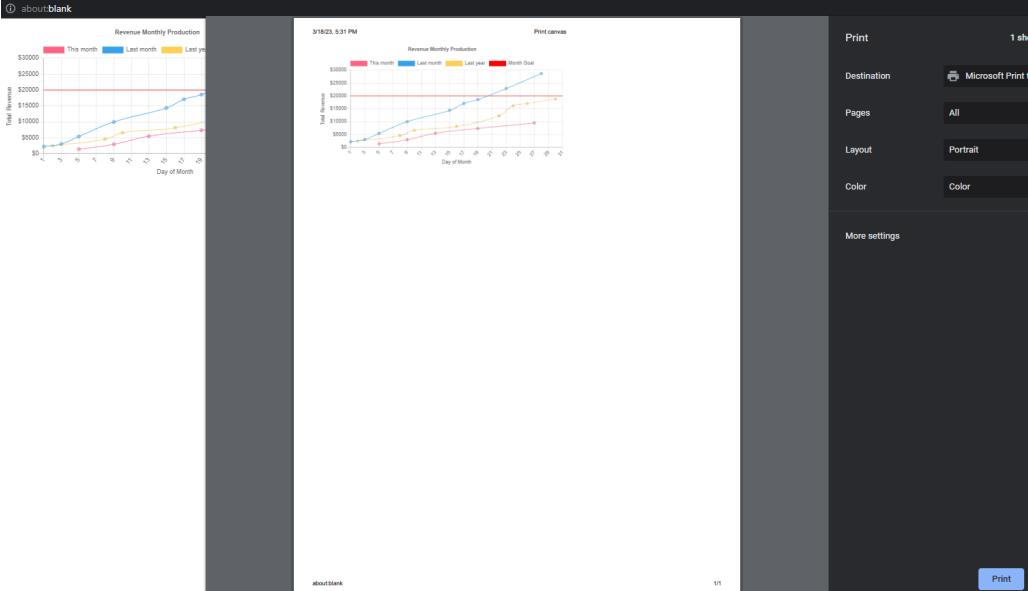
## Analytics Page - Providers Access Level

### 1. Test 1:

<b>Test Case: 1</b>	Provider Access Level View
<b>Expected Output</b>	Only line graph of their data is displayed
<b>Result</b>	 <p>The screenshot displays a line graph titled "Revenue Monthly Production". The Y-axis is labeled "Total Revenue" and ranges from \$0 to \$30,000. The X-axis is labeled "Day of Month" and shows days from 1 to 31. Four data series are plotted: "This month" (pink line with circles), "Last month" (blue line with diamonds), "Last year" (yellow line with squares), and "Month Goal" (red horizontal line). The "Last month" series starts at approximately \$20,000 on day 1 and rises steadily to about \$28,000 by day 31. The "Last year" series follows a similar upward trend but remains lower than "Last month", ending around \$20,000. The "This month" series is the lowest, starting near \$10,000 and rising to about \$18,000. A red horizontal line represents the "Month Goal" at approximately \$22,000. A blue "Print" button is visible in the top right corner of the graph area.</p>
<b>Pass or Fail?</b>	PASS

### 2. Test 2:

<b>Test Case: 2</b>	Print button is clicked
<b>Expected Output</b>	User (Provider) is able to take a print of their data's line graph

<b>Test Case: 2</b>	Print button is clicked
<b>Result</b>	
<b>Pass or Fail?</b>	PASS

## Monthly Goals Page

### 1. Test 1:

<b>Test Case: 1</b>	All monthly goals are displayed
<b>Expected Output</b>	The monthly Goals page is accurately displayed
<b>Result</b>	

<b>Test Case: 1</b>	All monthly goals are displayed																												
	 <table border="1"> <thead> <tr style="background-color: #0070C0; color: white;"> <th></th> <th>MONTH</th> <th>YEAR</th> <th>GOAL</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>March</td> <td>2023</td> <td>20000</td> </tr> <tr> <td><input type="checkbox"/></td> <td>January</td> <td>2023</td> <td>10000</td> </tr> <tr> <td><input type="checkbox"/></td> <td>August</td> <td>2023</td> <td>13000</td> </tr> <tr> <td><input type="checkbox"/></td> <td>April</td> <td>2023</td> <td>30000</td> </tr> <tr> <td><input type="checkbox"/></td> <td>November</td> <td>2022</td> <td>5000</td> </tr> <tr> <td><input type="checkbox"/></td> <td>October</td> <td>2022</td> <td>4000</td> </tr> </tbody> </table>		MONTH	YEAR	GOAL	<input type="checkbox"/>	March	2023	20000	<input type="checkbox"/>	January	2023	10000	<input type="checkbox"/>	August	2023	13000	<input type="checkbox"/>	April	2023	30000	<input type="checkbox"/>	November	2022	5000	<input type="checkbox"/>	October	2022	4000
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<b>Pass or Fail?</b>	PASS																												

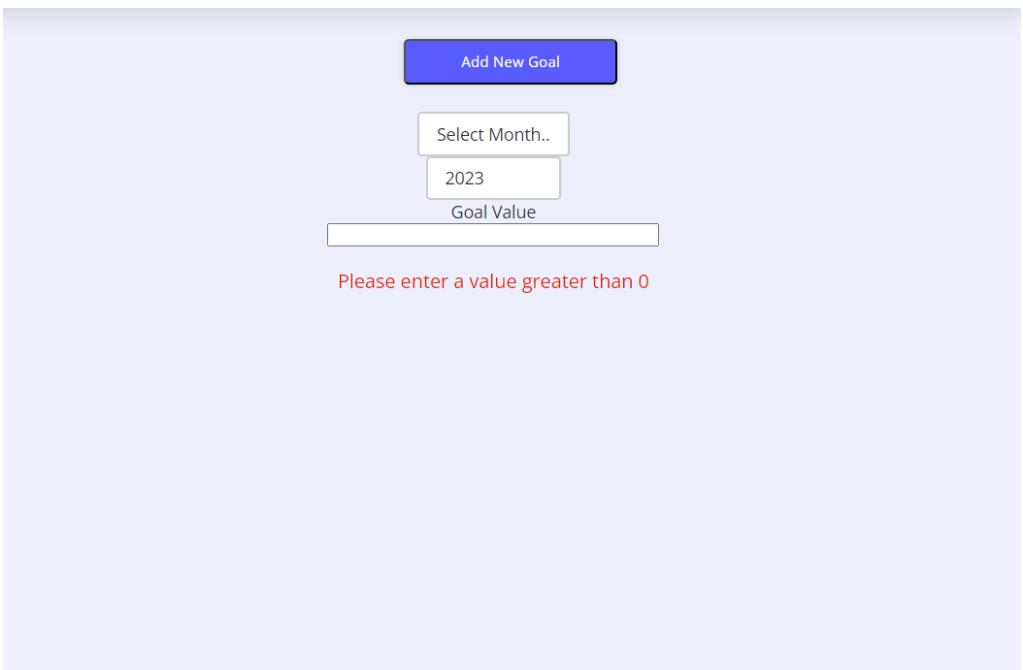
## 2. Test 2:

<b>Test Case: 2</b>	Row is checked and “Delete Selected Goals” Button is pressed																								
<b>Expected Output</b>	The selected goal is deleted from the page																								
<b>Result</b>	 <table border="1"> <thead> <tr style="background-color: #0070C0; color: white;"> <th></th> <th>MONTH</th> <th>YEAR</th> <th>GOAL</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>March</td> <td>2023</td> <td>20000</td> </tr> <tr> <td><input type="checkbox"/></td> <td>January</td> <td>2023</td> <td>10000</td> </tr> <tr> <td><input type="checkbox"/></td> <td>August</td> <td>2023</td> <td>13000</td> </tr> <tr> <td><input type="checkbox"/></td> <td>November</td> <td>2022</td> <td>5000</td> </tr> <tr> <td><input type="checkbox"/></td> <td>October</td> <td>2022</td> <td>4000</td> </tr> </tbody> </table>		MONTH	YEAR	GOAL	<input type="checkbox"/>	March	2023	20000	<input type="checkbox"/>	January	2023	10000	<input type="checkbox"/>	August	2023	13000	<input type="checkbox"/>	November	2022	5000	<input type="checkbox"/>	October	2022	4000
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<b>Pass or Fail?</b>	PASS																								

## Add Goals Page

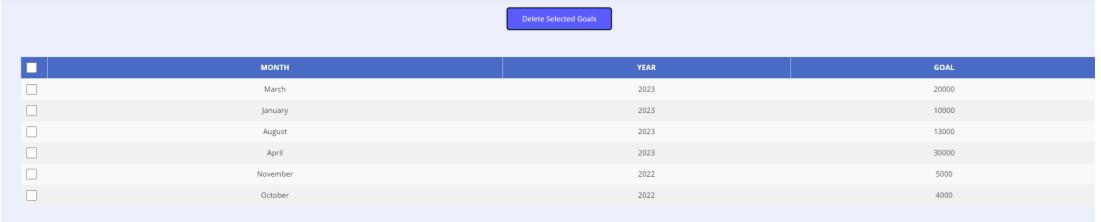
### 1. Test 1:

<b>Test Case: 1</b>	Invalid input is entered
<b>Expected Output</b>	Error is displayed, informing user to input valid information

<b>Test Case: 1</b>	Invalid input is entered
<b>Result</b>	<p><b>FAIL</b></p> <p><i>User can add a negative value or a value of 0 and it will be accepted as a valid goal</i></p> <p>Bug was fixed. Retesting.</p> <p><b>Expected:</b> Error is displayed, informing user to input valid information</p> <p><b>Pass or Fail: PASS</b></p> <p><b>Screenshot:</b></p>  <p>The screenshot shows a user interface for adding a new goal. It includes a blue 'Add New Goal' button, a dropdown menu labeled 'Select Month...', and a text input field labeled 'Goal Value'. A red error message at the bottom states 'Please enter a value greater than 0'.</p>
<b>Pass or Fail?</b>	PASS

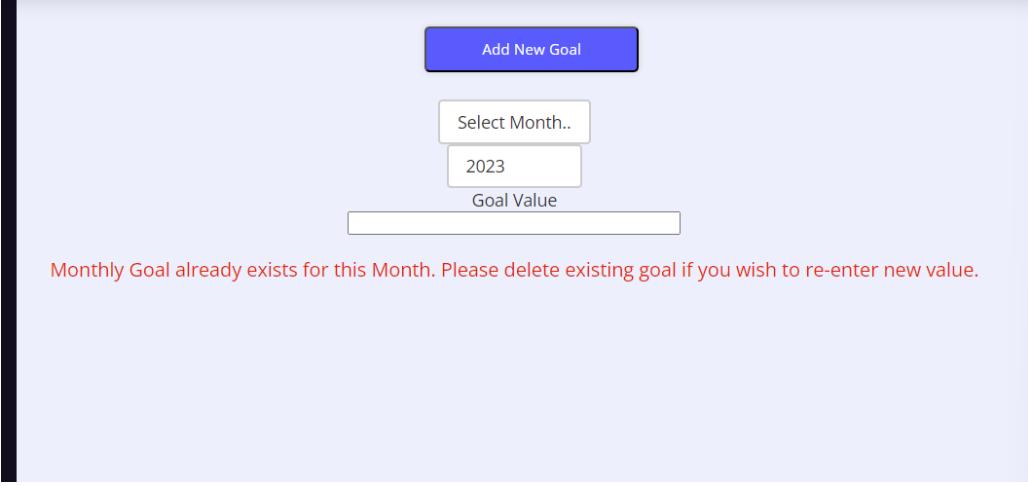
## 2. Test 2:

<b>Test Case: 2</b>	Valid inputs are entered and Add Goal Button is clicked
<b>Expected Output</b>	The Monthly Goal page is updated with the new goal

<b>Test Case: 2</b>	Valid inputs are entered and Add Goal Button is clicked
<b>Result</b>	 
<b>Pass or Fail?</b>	PASS

### 3. Test 3:

<b>Test Case: 3</b>	New goal entered for existing Month and Year
<b>Expected Output</b>	Error is displayed and the value is not added to the database

<b>Test Case: 3</b>	New goal entered for existing Month and Year
<b>Result</b>	 <p>The screenshot shows a user interface for adding a new goal. It includes a blue 'Add New Goal' button, a dropdown menu labeled 'Select Month...', and a text input field containing '2023'. Below these is a placeholder 'Goal Value' with a long, empty input field. A red error message at the bottom states: 'Monthly Goal already exists for this Month. Please delete existing goal if you wish to re-enter new value.'</p>
<b>Pass or Fail?</b>	PASS

## Upload CSV button

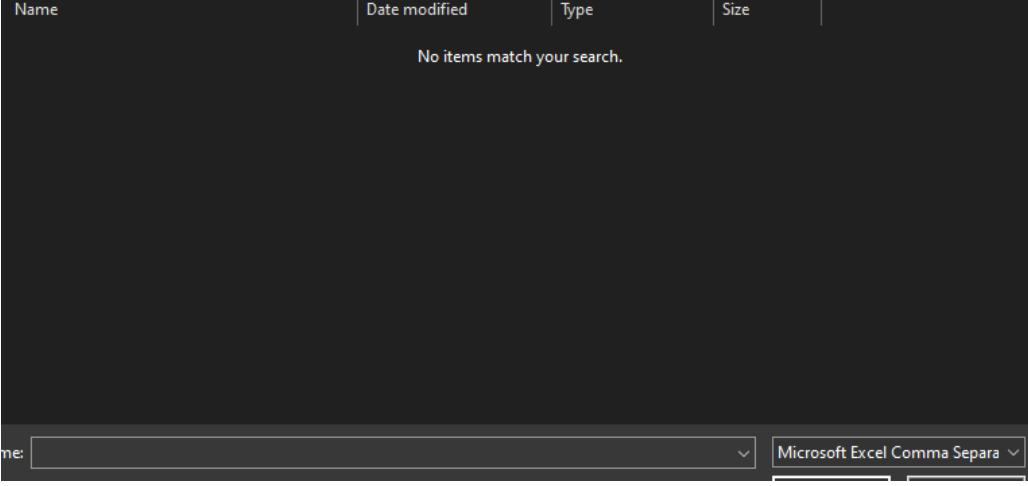
1. Test 1:

<b>Test Case: 1</b>	One of the files is not uploaded
<b>Expected Output</b>	User is prompted to enter the other file

<b>Test Case: 1</b>	One of the files is not uploaded
<b>Result</b>	<p><b>Upload Ledger CSV:</b></p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <input type="button" value="Choose File"/> LedgerData_20230312.csv         </div> <p><b>Upload Appointment CSV:</b></p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <input type="button" value="Choose File"/> No file chosen         </div> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin-left: auto; margin-right: 0;"> <span style="color: orange;">!</span> Please select a file.       </div> <div style="background-color: #e0e0e0; border-radius: 10px; padding: 5px; display: inline-block; margin-top: 10px;"> <input type="button" value="Upload"/> </div>
<b>Pass or Fail?</b>	PASS

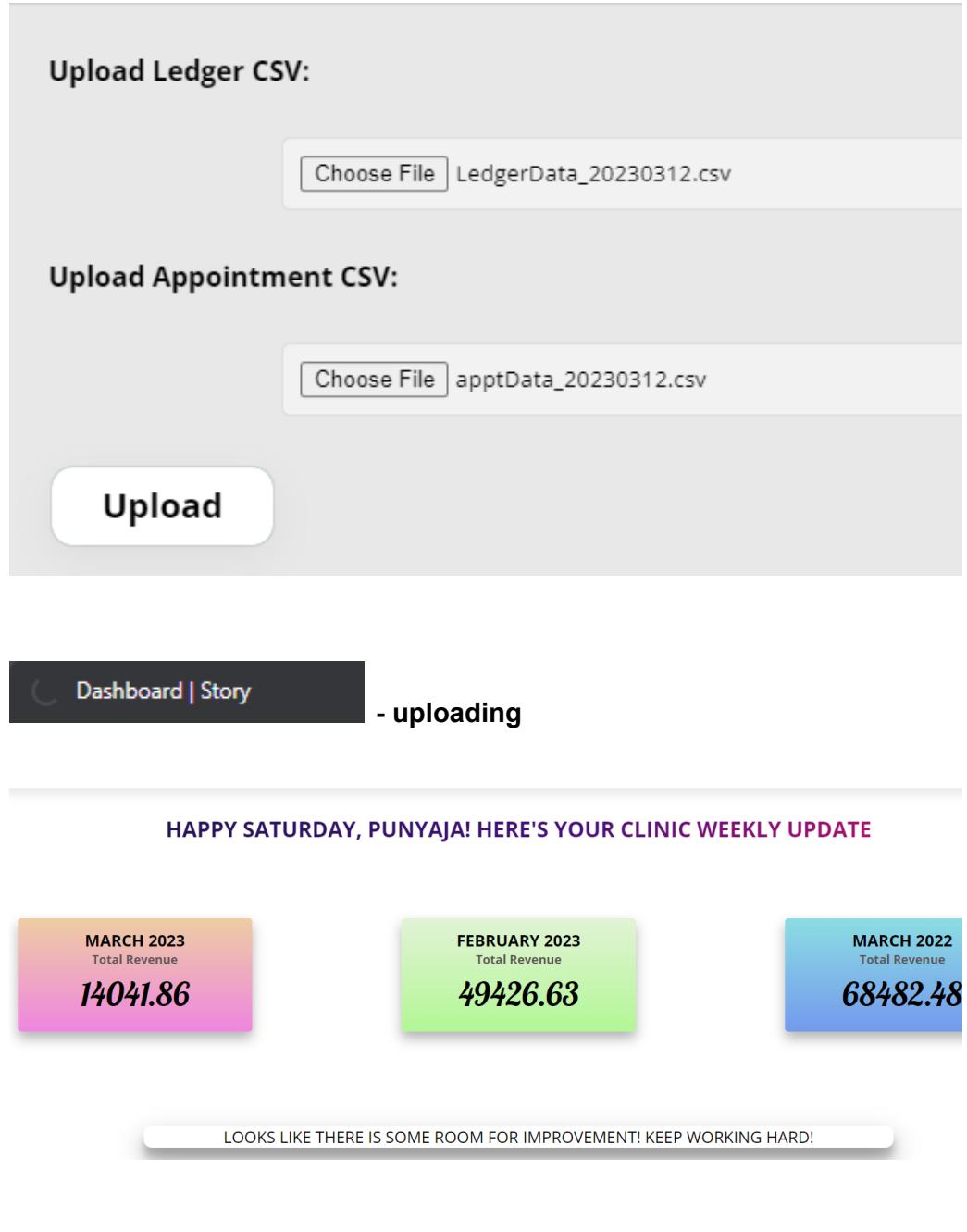
## 2. Test 2:

<b>Test Case: 2</b>	Wrong Filetype is uploaded (not csv)
<b>Expected Output</b>	User is not allowed to upload any other data type except csv

<b>Test Case: 2</b>	Wrong Filetype is uploaded (not csv)
<b>Result</b>	 <p>A screenshot of a file upload interface. At the top, there is a search bar with the placeholder "Name" and a dropdown menu next to it set to "Microsoft Excel Comma Separated". Below the search bar, a message says "No items match your search.".</p>
<b>Pass or Fail?</b>	PASS

### 3. Test 3:

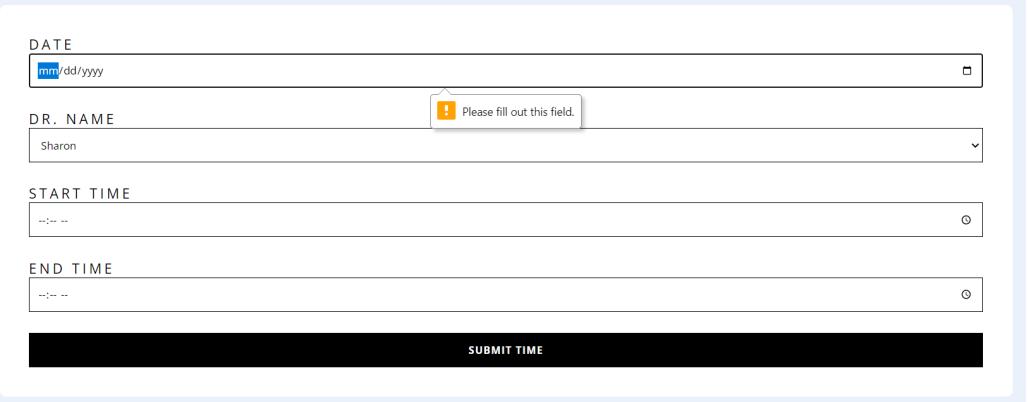
<b>Test Case: 3</b>	Correct filetype is uploaded
<b>Expected Output</b>	Page refreshes to main page - dashboard and the new data is added to the database

<b>Test Case: 3</b>	Correct filetype is uploaded
<b>Result</b>	<p><b>Upload Ledger CSV:</b></p> <p><input type="button" value="Choose File"/> LedgerData_20230312.csv</p> <p><b>Upload Appointment CSV:</b></p> <p><input type="button" value="Choose File"/> apptData_20230312.csv</p> <p><b>Upload</b></p>  <p>The screenshot shows a dashboard interface. At the top, there are two input fields for CSV files: 'Ledger Data' and 'Appointment Data'. Below them is a large 'Upload' button. In the center, a progress bar indicates an upload is in progress ('Dashboard   Story - uploading'). Below the progress bar, a purple banner says 'HAPPY SATURDAY, PUNYAJA! HERE'S YOUR CLINIC WEEKLY UPDATE'. Three colored boxes show revenue for March 2023 (orange), February 2023 (green), and March 2022 (blue). The March 2023 box shows '14041.86'. The February 2023 box shows '49426.63'. The March 2022 box shows '68482.48'. At the bottom, a message says 'LOOKS LIKE THERE IS SOME ROOM FOR IMPROVEMENT! KEEP WORKING HARD!'.</p>

<b>Test Case: 3</b>	Correct filetype is uploaded																								
	<table border="1"> <thead> <tr> <th>transaction_id</th> <th>transaction_date</th> <th>total</th> <th>user_code</th> </tr> </thead> <tbody> <tr> <td>33369</td> <td>2023-02-03</td> <td>28</td> <td>IM</td> </tr> <tr> <td>33370</td> <td>2023-02-03</td> <td>192</td> <td>IM</td> </tr> <tr> <td>33371</td> <td>2023-02-03</td> <td>32</td> <td>IM</td> </tr> <tr> <td>33372</td> <td>2023-02-03</td> <td>156</td> <td>ZW</td> </tr> <tr> <td>33373</td> <td>2023-02-03</td> <td>28</td> <td>IM</td> </tr> </tbody> </table>	transaction_id	transaction_date	total	user_code	33369	2023-02-03	28	IM	33370	2023-02-03	192	IM	33371	2023-02-03	32	IM	33372	2023-02-03	156	ZW	33373	2023-02-03	28	IM
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33373	2023-02-03	28	IM																						
<b>Pass or Fail?</b>	PASS																								

## Receptionist - Add Timesheet Schedule

### 1. Test 1: -

<b>Test Case: 1</b>	All input is left empty
<b>Input</b>	
<b>Expected Output</b>	It will ask the user to input the fields. This means that Timesheet Can not be submitted empty. Hence, our test is passed.
<b>Result</b>	
<b>Pass or Fail?</b>	PASS

**2. Test 2: -**

<b>Test Case: 2</b>	Only Date is Entered and all other fields are left empty
<b>Expected Output</b>	If we entered the date, it will ask the user to input the Start Time Field. Again, The Timesheet is not submitted.
<b>Result</b>	<p>The screenshot shows a web-based form for a timesheet. The 'DATE' field contains '03/25/2023'. The 'DR. NAME' field contains 'Sharon'. The 'START TIME' field has a dropdown menu open with 'Select' as the placeholder. The 'END TIME' field is empty and has a validation error message: 'Please fill out this field.' A 'SUBMIT TIME' button is visible at the bottom.</p>
<b>Pass or Fail?</b>	PASS

**3. Test 3: -**

<b>Test Case: 3</b>	Date and Start Time is Entered. But the End-Time is left.
<b>Expected Output</b>	If we entered the date and start time, still the End-Time field is left empty, it will ask the user to input the End Time Field. Again, The Timesheet is not submitted.

<b>Test Case: 3</b>	Date and Start Time is Entered. But the End-Time is left.
<b>Result</b>	<p>DATE 03/25/2023</p> <p>DR. NAME Sharon</p> <p>START TIME 02:28 PM</p> <p>END TIME [Field is empty]</p> <p style="text-align: center;"> Please fill out this field.</p>
<b>Pass or Fail?</b>	PASS

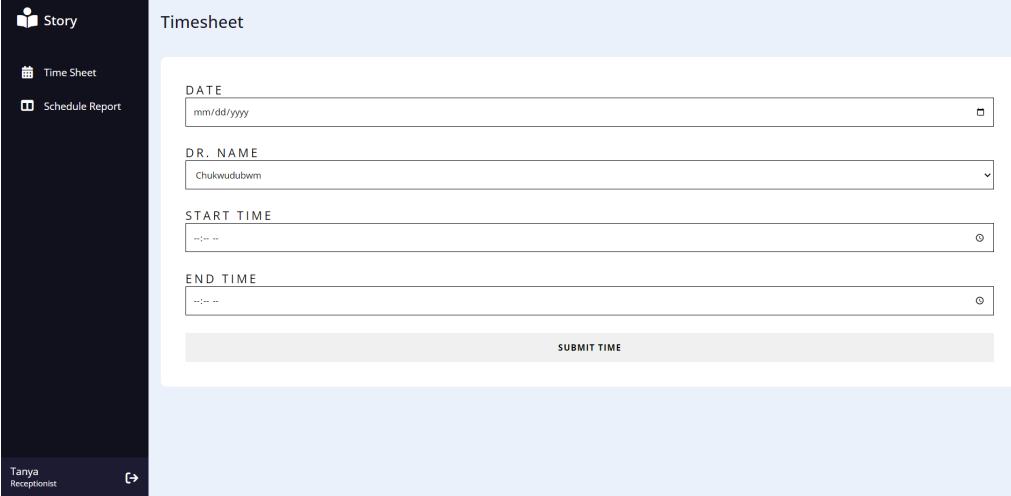
#### 4. Test 4: -

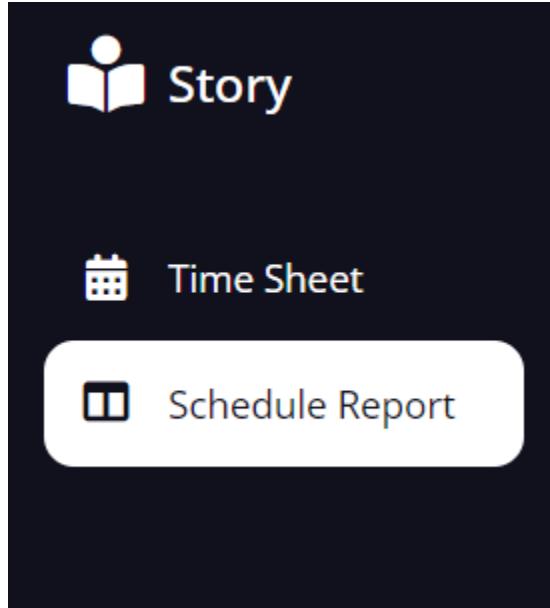
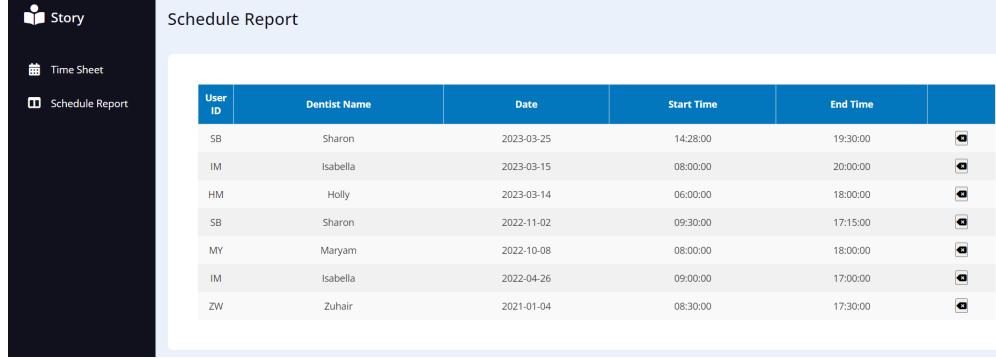
<b>Test Case: 4</b>	All inputs are entered and pressed Submit
<b>Input</b>	<p>DATE 03/25/2023</p> <p>DR. NAME Sharon</p> <p>START TIME 02:28 PM</p> <p>END TIME 07:30 PM</p> <p style="text-align: center;">SUBMIT TIME</p>
<b>Expected Output</b>	It should submit the Timesheet, and if we look at the result in the Schedule Report Page, we can see that the entered data on the Timesheet page is sent into the database, and the schedule report has gotten the result from the

<b>Test Case: 4</b>	All inputs are entered and pressed Submit										
	database quickly.										
<b>Result</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #0078d4; color: white;"> <th>User ID</th> <th>Dentist Name</th> <th>Date</th> <th>Start Time</th> <th>End Time</th> </tr> </thead> <tbody> <tr> <td>SB</td> <td>Sharon</td> <td>2023-03-25</td> <td>14:28:00</td> <td>19:30:00</td> </tr> </tbody> </table>	User ID	Dentist Name	Date	Start Time	End Time	SB	Sharon	2023-03-25	14:28:00	19:30:00
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SB	Sharon	2023-03-25	14:28:00	19:30:00							
<b>Pass or Fail?</b>	PASS										

## Receptionist - View Existing Timesheet Schedules

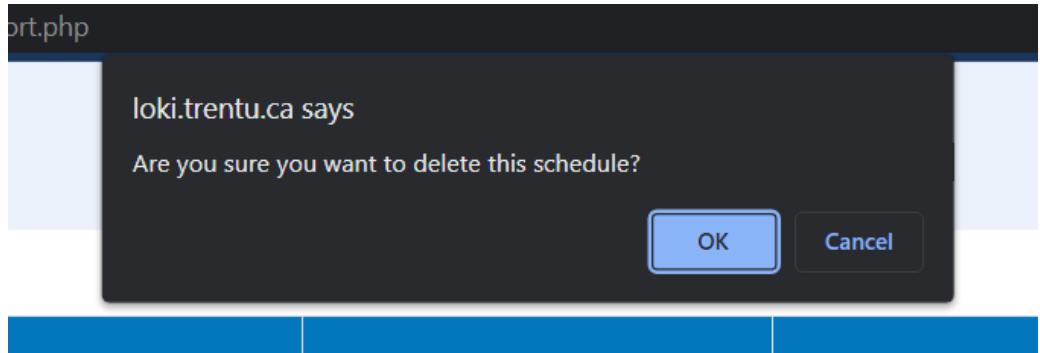
1. Test: -

<b>Test Case</b>	Schedule Report link on navigation bar is clicked.
<b>Input</b>	<p>This is the Timesheet Page, and on left side navigation bar, there is a link to Schedule Report page.</p>  <p>Clicking on the Schedule Report Page.</p>

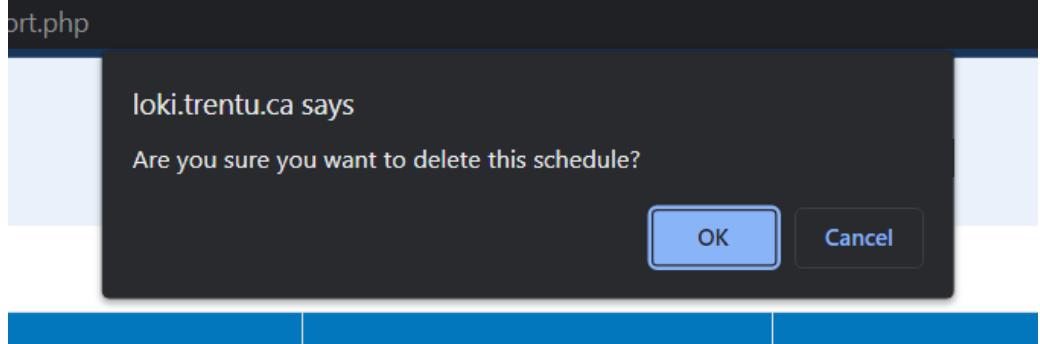
<b>Test Case</b>	Schedule Report link on navigation bar is clicked.																																																
																																																	
<b>Expected Output</b>	After clicking on the Schedule report page link, the user will be redirected to the Schedule report page, which will display all of the data from the database.																																																
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## Receptionist - Delete Existing Timesheet Schedules

1. Test 1: -

<b>Test Case: 1</b>	Delete button on the last column is pressed for a row.																																																
<b>Input</b>	This is the Schedule Report data, if we click on the last column delete button for a First row (Sharon) <table border="1" data-bbox="470 460 1481 756"> <thead> <tr> <th>User ID</th><th>Dentist Name</th><th>Date</th><th>Start Time</th><th>End Time</th><th></th></tr> </thead> <tbody> <tr> <td>SB</td><td>Sharon</td><td>2023-03-25</td><td>14:28:00</td><td>19:30:00</td><td></td></tr> <tr> <td>IM</td><td>Isabella</td><td>2023-03-15</td><td>08:00:00</td><td>20:00:00</td><td></td></tr> <tr> <td>HM</td><td>Holly</td><td>2023-03-14</td><td>06:00:00</td><td>18:00:00</td><td></td></tr> <tr> <td>SB</td><td>Sharon</td><td>2022-11-02</td><td>09:30:00</td><td>17:15:00</td><td></td></tr> <tr> <td>MY</td><td>Maryam</td><td>2022-10-08</td><td>08:00:00</td><td>18:00:00</td><td></td></tr> <tr> <td>IM</td><td>Isabella</td><td>2022-04-26</td><td>09:00:00</td><td>17:00:00</td><td></td></tr> <tr> <td>ZW</td><td>Zuhair</td><td>2021-01-04</td><td>08:30:00</td><td>17:30:00</td><td></td></tr> </tbody> </table>	User ID	Dentist Name	Date	Start Time	End Time		SB	Sharon	2023-03-25	14:28:00	19:30:00		IM	Isabella	2023-03-15	08:00:00	20:00:00		HM	Holly	2023-03-14	06:00:00	18:00:00		SB	Sharon	2022-11-02	09:30:00	17:15:00		MY	Maryam	2022-10-08	08:00:00	18:00:00		IM	Isabella	2022-04-26	09:00:00	17:00:00		ZW	Zuhair	2021-01-04	08:30:00	17:30:00	
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<b>Pass or Fail?</b>	PASS																																																

**2. Test 2 : -**

<b>Test Case: 2</b>	Delete button on the last column is pressed for a row but in alert window, the user has pressed cancel																																										
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# Users Instruction Manual

## Product Identification Information

**Product Name:** Longworth Dashboard Story

**Model Number:** V1.0

## Pre-requisites

At Present, only those user individuals whose login credentials have been directly created within the database are able to access the application, and are limited to their assigned user-role view. It is important to note that for security purposes, all users will be required to change their passwords upon receipt of their login credentials.

## Adding New Users - Sign Up

Welcome to the Story Website! To create your account, follow these simple steps:

- Access the Sign-Up Page: Visit our homepage and click the "Create Account" button located at the top right corner.



- Fill Out the Registration Form: On the Sign-Up page, provide your full name, a valid email address, and create a secure password. Enter the user code of maximum length - 5 (it should be given by the company) and select the position/role of your job. Don't forget to read to our Terms of Service and Privacy Policy.

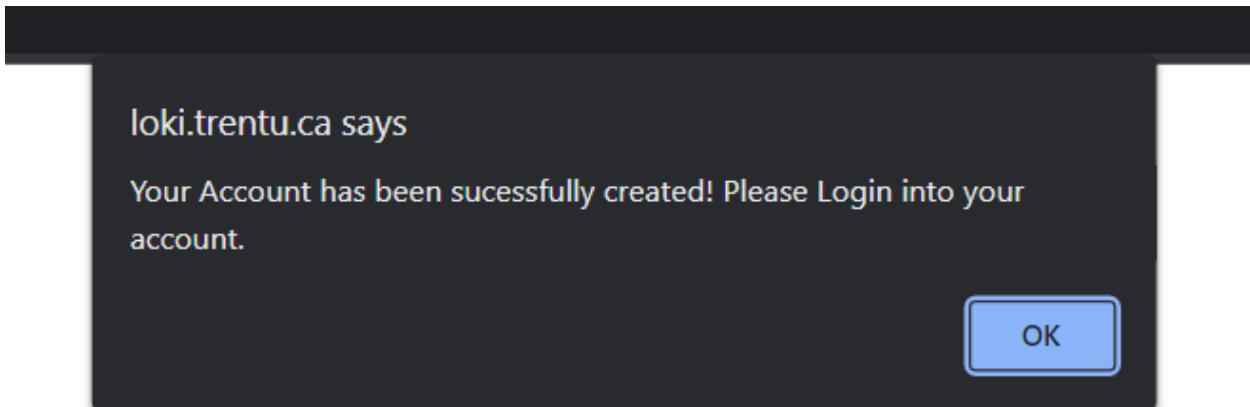
## Sign up Page: -

The screenshot shows a sign-up form titled "Sign Up to Story". It includes fields for "FIRST NAME" and "LAST NAME", both of which are currently empty. Below these is an "EMAIL ADDRESS" field containing "name@example.com" and a "PASSWORD" field containing "\*\*\*\*\*". A note below the password field states: "For Password: Use at least 8 or more characters with a mix of letters, numbers & symbols". There is also a "CONFIRM PASSWORD" field below it, which is currently empty. To the right of the form, there is a vertical "OR" separator followed by three social login buttons: "Continue with Apple", "Continue with LinkedIn", and "Continue with Google". A "LOGIN" link is located in the top right corner of the page.

This screenshot shows a modified sign-up form. It retains the "EMAIL ADDRESS" field (containing "name@example.com") and the "PASSWORD" field (containing "\*\*\*\*\*"). A note below the password field reiterates the password requirements: "For Password: Use at least 8 or more characters with a mix of letters, numbers & symbols". A "CONFIRM PASSWORD" field is also present. New fields include "USER CODE" and "POSITION:" dropdown, which is set to "Dentist". At the bottom is a large "SIGN UP" button. Below the form, a link to "ALREADY HAVE AN ACCOUNT?" is visible, along with a small note about accepting terms and privacy policies.

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- Log In and Explore: After clicking on Sign Up button, your account will be registered.



You will need to click 'OK' so that it will automatically re-direct you to the Log in Page.

Congratulations! Your account is now active. Use your email and password to log in and start exploring our platform.

## Accessing the Application - Log In

Welcome to the Story Website! To log in to your account, follow these simple steps:

- Access the Login Page: Visit our homepage. You'll find the login section prominently displayed. Login page is basically our homepage:-

The screenshot shows a web browser window with the URL <https://loki.trentu.ca/~sidaksinghsra/4000Y/login.php>. The page title is "Sign In | Story".

**Sign In to Story**

EMAIL ADDRESS  
name@example.com

PASSWORD  
Password

SIGN IN

CAN'T LOG IN?  
By creating an account or continuing to use a Story application, website, or software, you acknowledge and agree that you have accepted the [Terms of Service](#) and have reviewed the [Privacy Policy](#).

OR

CREATE ACCOUNT

Continue with Apple

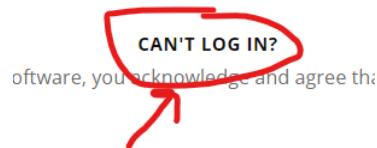
Continue with LinkedIn

Continue with Google

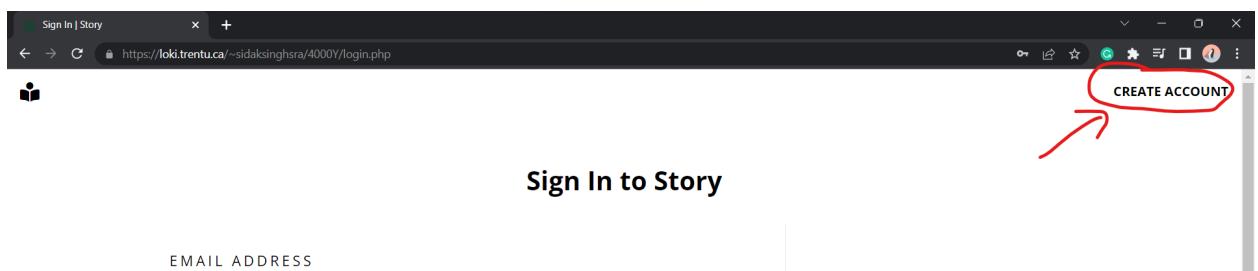
- Enter Credentials: In the designated fields, input your registered email address and password. Be sure to double-check for accuracy to avoid login issues.
- Click 'SIGN IN': Once you've entered your credentials, click the 'SIGN IN' button. If your information is correct, you'll be redirected to your personalized account dashboard, according to your user role.

Login page is also having the additional following functionalities: -

- Forgot Password? If you're having trouble remembering your password, click the 'CAN'T LOG IN?' link. Follow the on-screen instructions to reset your password and regain access to your account. We have provided the detailed information about how to reset your password in this user manual.



- New User? If you haven't created an account yet, click the 'Create Account' button to register!



- Terms of Service & Privacy Policy: Familiarize yourself with our terms and privacy policy by clicking on the respective links available at the bottom of the homepage. It's important to understand and adhere to these guidelines while using our platform.

CAN'T LOG IN?  
By creating an account or continuing to use a Story application, website, or software, you acknowledge and agree that you have accepted the [Terms of Service](#) and I have reviewed the [Privacy Policy](#).

# Change Password, Forgot Password, Reset Password

If you need to reset or change your password, follow these simple steps:

- Access Forgot Password Page: On the Login page, click the 'Can't login?' link. You'll be redirected to the Forgot Password page.



Forgot Password page: -

Forgot Password

Enter your account's email and we'll send you an email to reset the password.

EMAIL ADDRESS  
name@example.com

SEND RESET OTP

Secure Login with reCAPTCHA subject to Google  
[Terms & Privacy](#)

© 2022 Story

- Request Reset OTP: Enter your registered email address and click the 'Send Reset OTP' button. If your email address is registered with Story Website, you'll receive a 4-digit verification code.
- Email Verification: Check your inbox for an email containing the unique 4-digit verification code. If your email isn't registered, you won't receive the code.

Password Reset Inbox x

 Story Password Reset <noreply@loki.trentu.ca>to me ▾ 21:17 (3 minutes ago) ⋮

Hi,

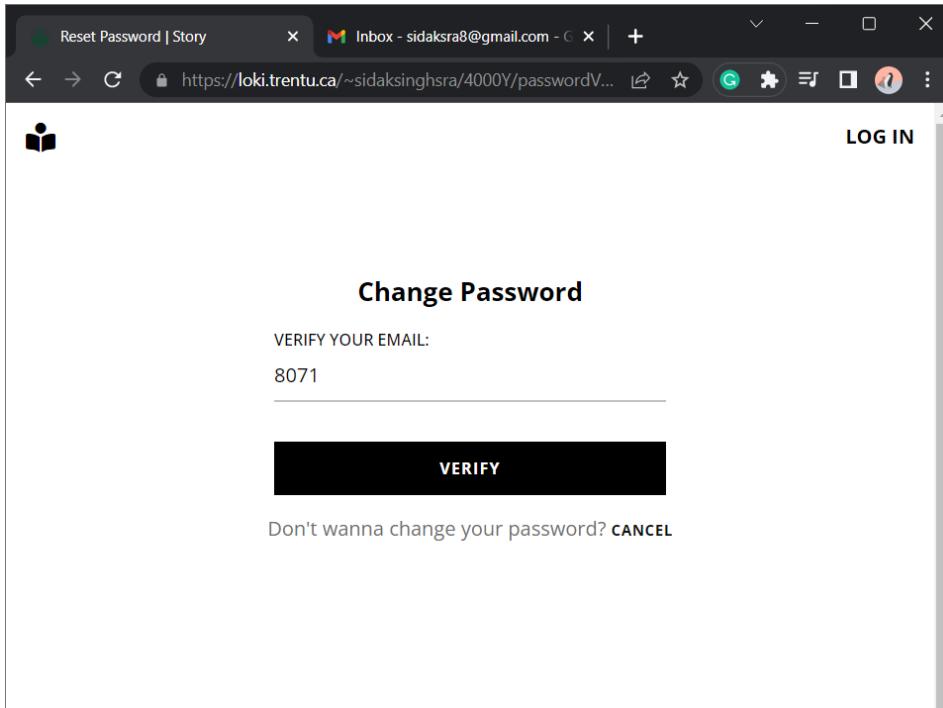
We got the request to reset your Story password.

Your verification code is 8071.

Please Don't share this code to anyone. If You didn't send the request for password change, please contact us through our email.

Thank You!  
From Team Story

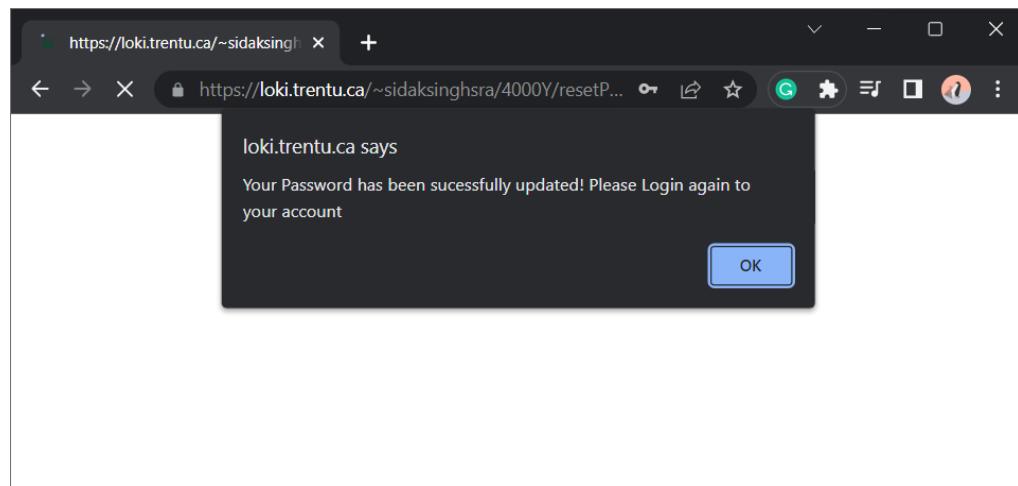
- Enter Verification Code: On the Verification page, input the 4-digit code from the email and click the 'Verify' button.



- You'll be redirected to the Reset Password page upon successful verification.

The screenshot shows a web browser window with the URL <https://loki.trentu.ca/~sidaksinghsra/4000Y/resetP...>. The page title is "Reset Password | Story". On the right side, there is a "LOG IN" button with a user icon. The main content area is titled "NEW PASSWORD" and contains instructions: "Use at least 8 or more characters with a mix of letters, numbers & symbols". There are two input fields: one for "ENTER YOUR NEW PASSWORD" and another for "RE-ENTER YOUR PASSWORD". Below these fields is a "SUBMIT" button. At the bottom, a note states: "Secure Login with reCAPTCHA subject to Google [Terms](#) & [Privacy](#)".

- Create a New Password: Enter a new password, following the guidelines of using at least 8 characters, including a mix of letters, numbers, and symbols. Re-enter the password for confirmation.
- Update Password: Click the 'Submit' button. An alert box will appear, confirming your password has been successfully updated. Return to Login Page: Click 'OK' on the alert box to be redirected to the Login page.

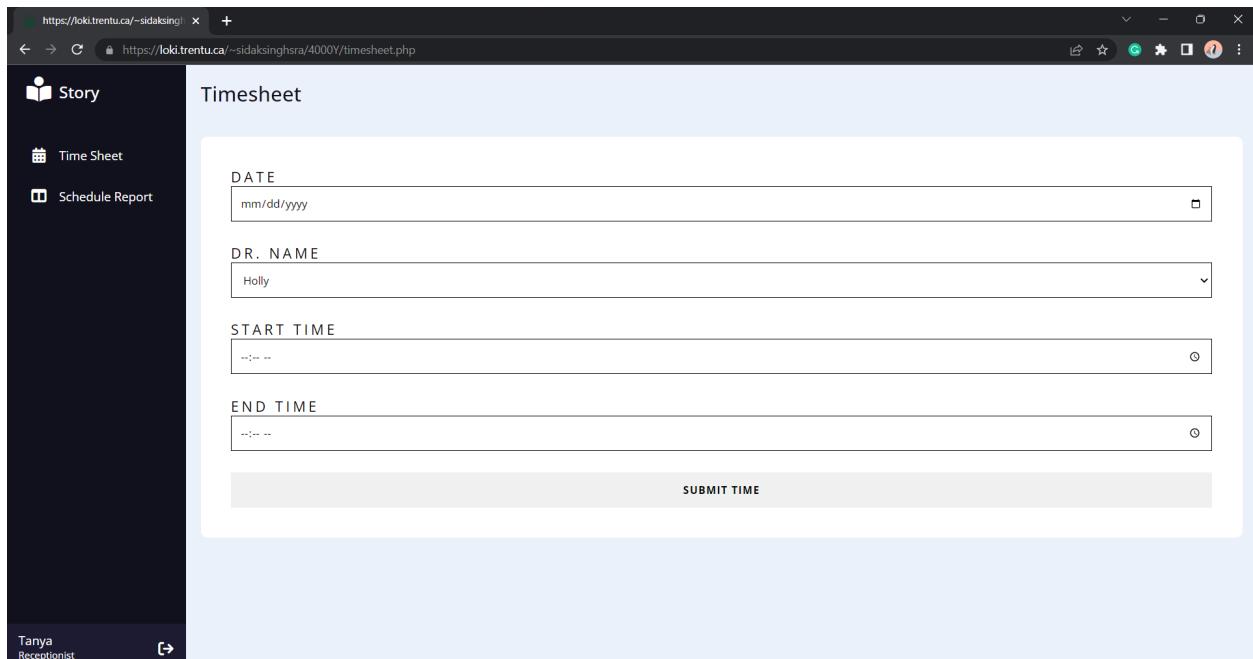


- You can now log in using your updated password.

## User Role Type - Receptionist

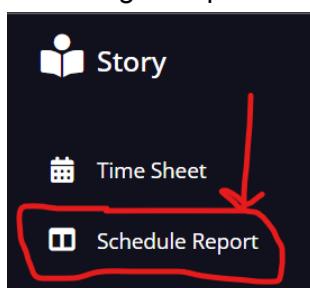
Welcome to the Receptionist Page! As a receptionist, you have access to various features, including viewing and managing timesheets for providers. Follow these simple steps to navigate the page:

- Login: Access the main Login page and sign in with your receptionist credentials. You will be redirected to the Receptionist Page upon successful login.



The screenshot shows a web browser window with the URL <https://loki.trentu.ca/~sidaksingh/>. The page title is "Timesheet". On the left, there is a sidebar with icons for "Story", "Time Sheet", and "Schedule Report". The "Time Sheet" icon is selected. Below the sidebar, it says "Tanya Receptionist". The main content area has fields for "DATE" (mm/dd/yyyy), "DR. NAME" (Holly), "START TIME" (dropdown menu showing "...:-- --"), and "END TIME" (dropdown menu showing "...:-- --"). A "SUBMIT TIME" button is at the bottom right.

- View Existing Timesheets: Click on the 'Schedule Report' link located in the left-hand side navigation panel.



You will be redirected to the Schedule Report page, where you can view existing schedules for all doctors, including their User ID, Dentist Name, Date of Schedule, Start Time, End Time, and a Delete button.

The screenshot shows a web browser window with the URL <https://loki.trentu.ca/~sidaksingh/>. The page title is "Schedule Report". On the left, there is a sidebar with icons for "Story" (book), "Time Sheet" (calendar), and "Schedule Report" (calendar). Below the sidebar, it says "Tanya Receptionist". The main content area displays a table titled "Schedule Report" with the following data:

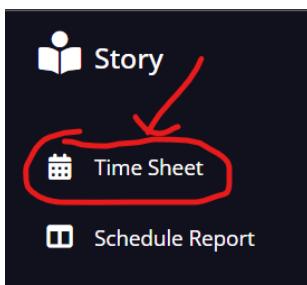
User ID	Dentist Name	Date	Start Time	End Time	Action
SB	Sharon	2022-11-02	09:30:00	17:15:00	
IM	Isabella	2022-04-26	09:00:00	17:00:00	
ZW	Zuhair	2021-01-04	08:30:00	17:30:00	

- Delete Schedule: To delete a schedule, click the 'Delete' button in the right-most column of the respective entry.



## Add New Timesheet for Provider - Timesheet

- Access Timesheet Page: Click the 'Timesheet' link in the left-hand side navigation panel to be redirected to the Timesheet page.



- Enter Schedule Details: Input the required information, including Date, Dr. Name, Start Time, and End Time for the doctor's schedule.

<b>DATE</b>	03/13/2023
<b>DR. NAME</b>	Sharon
<b>START TIME</b>	07:00 AM
<b>END TIME</b>	12:00 PM

**SUBMIT TIME**

- Submit Timesheet: Click the 'Submit Time' button to add the new schedule. You will be redirected to the Schedule Report page.
- View Updated Schedule: On the Schedule Report page, you can now see the newly added schedule for the particular provider on the top.

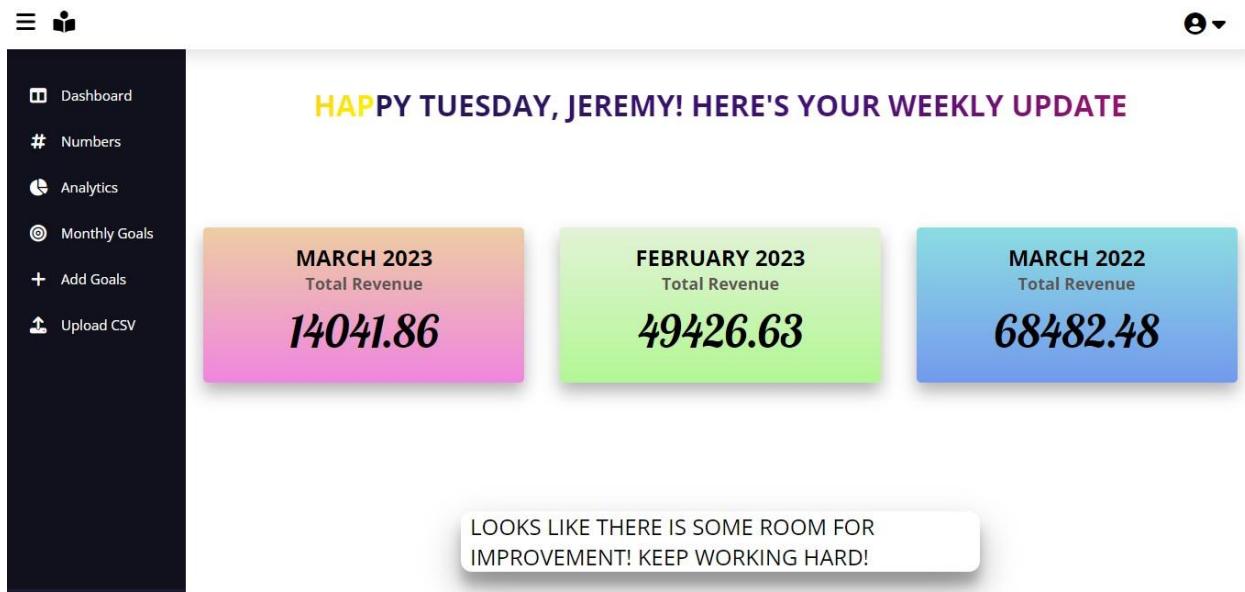
#### Schedule Report

User ID	Dentist Name	Date	Start Time	End Time	
SB	Sharon	2023-03-13	07:00:00	12:00:00	
SB	Sharon	2022-11-02	09:30:00	17:15:00	
IM	Isabella	2022-04-26	09:00:00	17:00:00	
ZW	Zuhair	2021-01-04	08:30:00	17:30:00	

## User Role Type - Manager

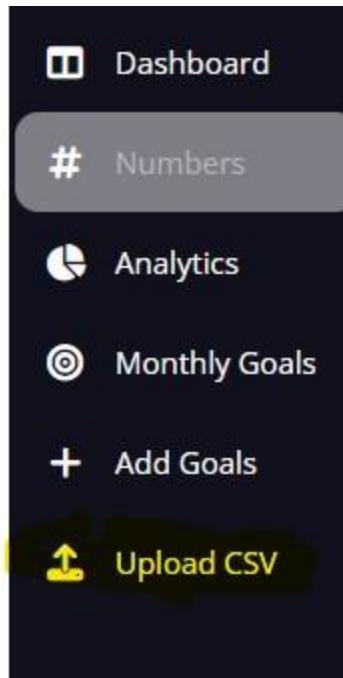
### Home Screen - Dashboard Page

After a manager logins in using their credentials, they will be presented with this dashboard page. A manager has full access to the application and can see all that's doing within his/her facility. A manager will be able to tell the difference in revenue between the current years and previous year amount for that month, also compared with the previous month right on the dashboard page.

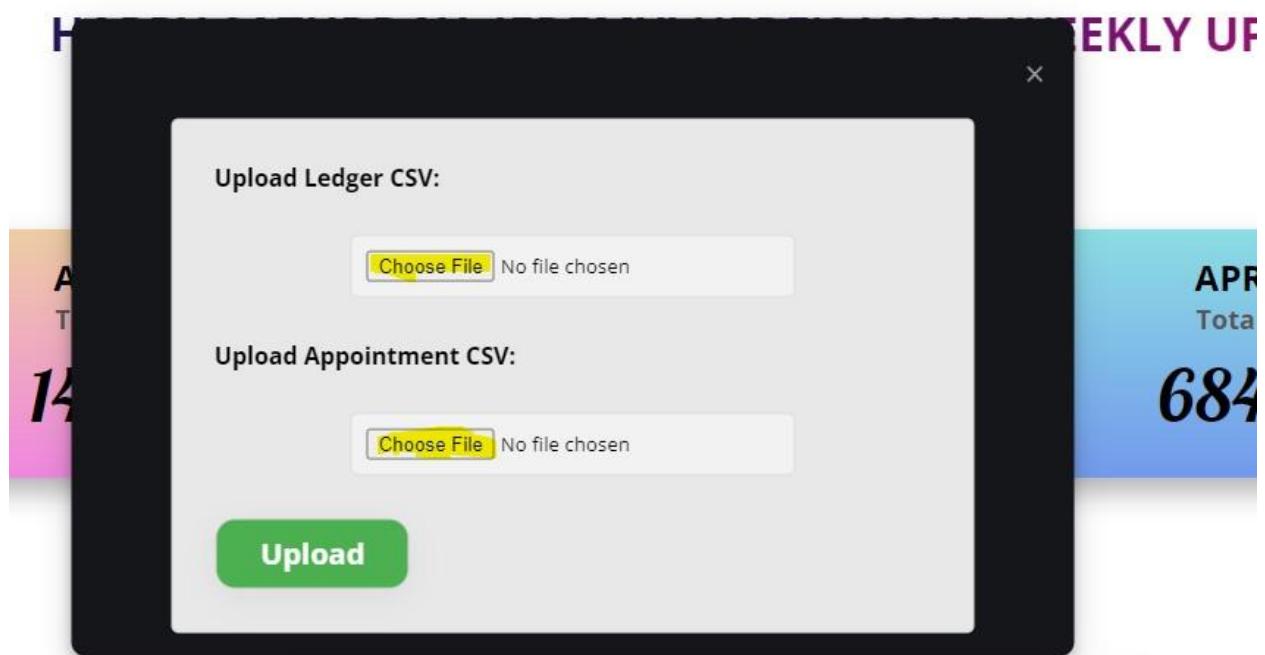


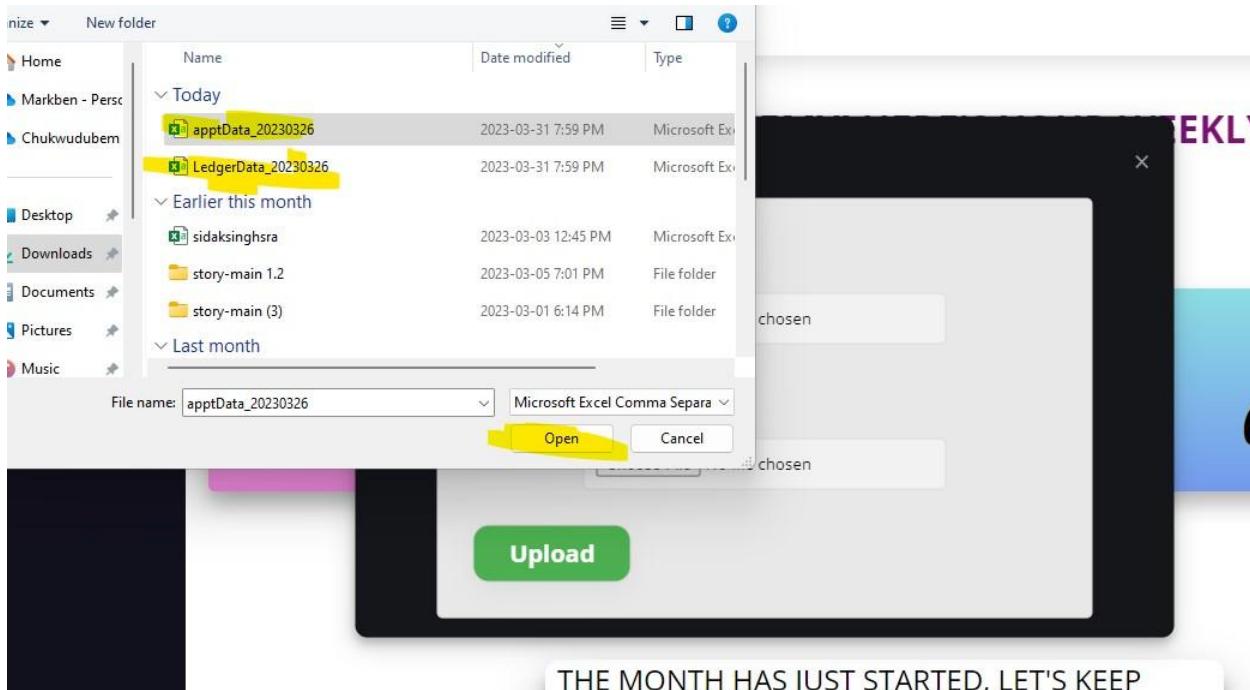
### Upload Weekly New Data - Upload csv

1. To input the New Weekly Data data, have your csv files ready to be uploaded.
2. Click on the “Upload CSV” Link on the navigation bar on the main dashboard page.



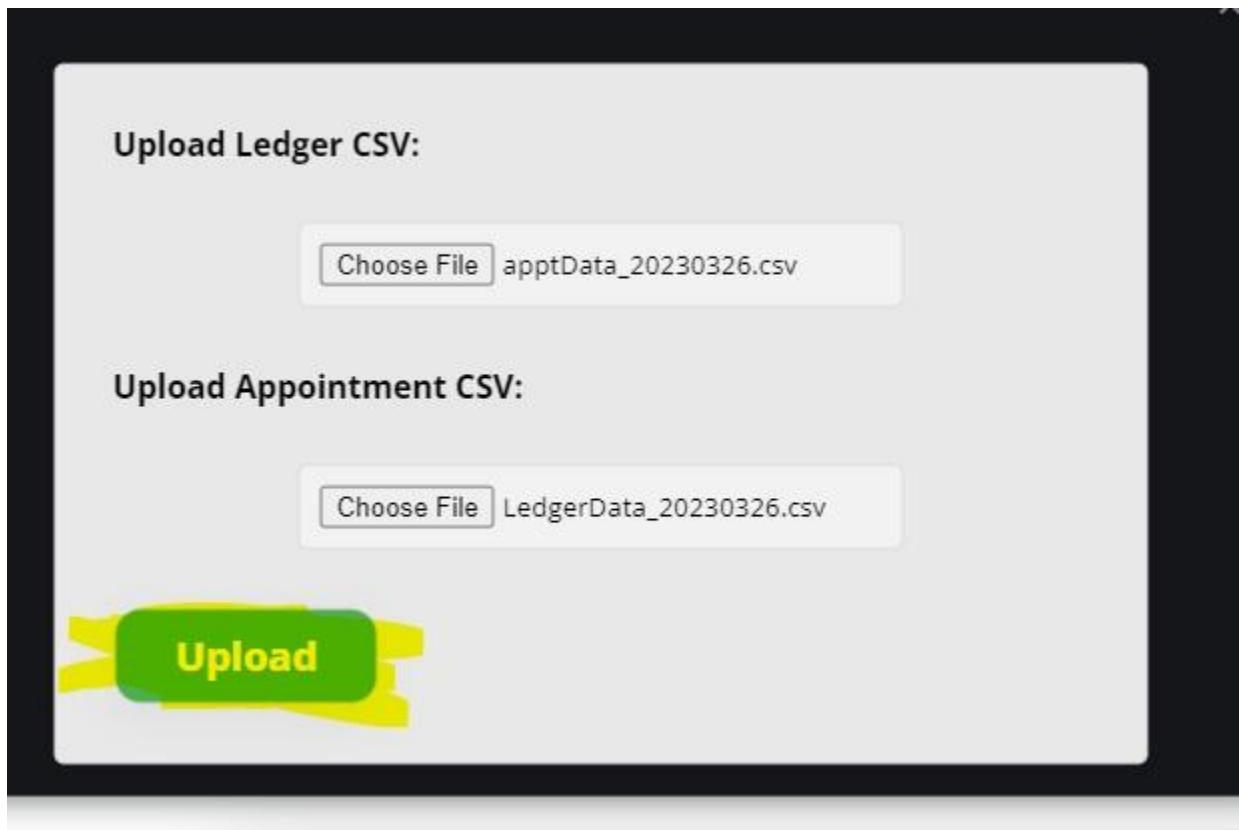
3. Once that is clicked you will be shown a new page, on that new page click on the “chosen file” button for both/either Upload Ledger CSV and Upload Appointment CSV, then locate your files in your system then select it to be uploaded.





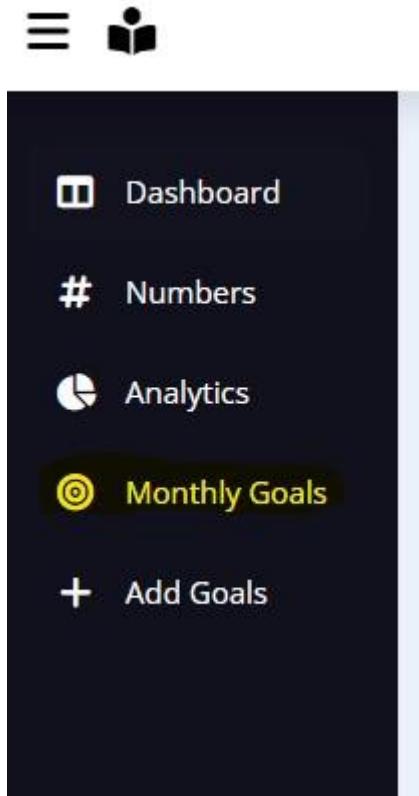
THE MONTH HAS JUST STARTED, LET'S KEEP

- Once both files are ready to be uploaded, click in the upload button.



## View Clinic's All Monthly Goals - Monthly Goals

1. To check All Monthly Goals, Click on the “Monthly Goal ” Link on the navigation bar on the main dashboard page



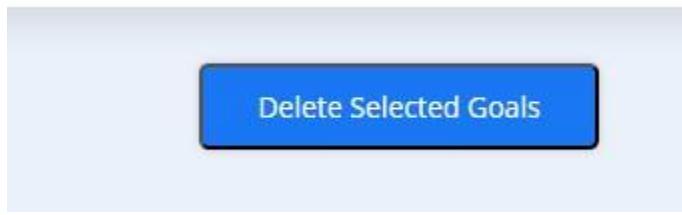
2. Once on the page the Manager will be able to view all previous monthly goals and current goal, the goals are divided into into 3 different categories, Year, Month and Amount

A screenshot of a web page titled "Monthly Goals". The sidebar on the left includes links for Dashboard, Numbers, Analytics, Monthly Goals (which is the active tab, indicated by a blue border), and Add Goals. The main content area shows a table with the following data:

<input type="checkbox"/>	MONTH	YEAR	GOAL
<input type="checkbox"/>	August	2023	13000
<input type="checkbox"/>	June	2023	70000
<input type="checkbox"/>	March	2023	20000
<input type="checkbox"/>	January	2023	10000
<input type="checkbox"/>	November	2022	5000
<input type="checkbox"/>	October	2022	4000

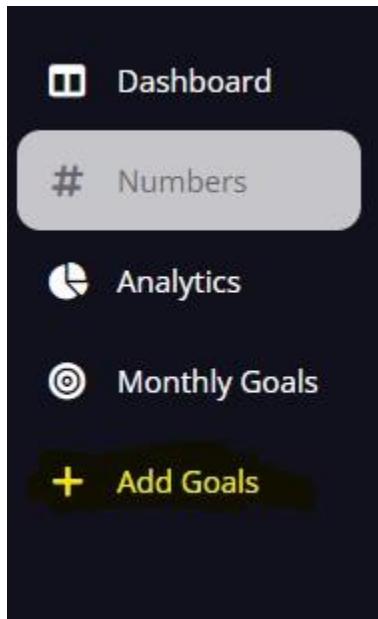
3. You can Delete Monthly Goals by clicking on the check-boxes then, clicking on Delete Selected Goals, by clicking on the top left box you will select all Monthly Goals that have been created.

	MONTH	YEAR	GOAL
<input checked="" type="checkbox"/>	August	2023	13000
<input checked="" type="checkbox"/>	June	2023	70000
<input checked="" type="checkbox"/>	March	2023	20000
<input checked="" type="checkbox"/>	January	2023	10000
<input checked="" type="checkbox"/>	November	2022	5000
<input checked="" type="checkbox"/>	October	2022	4000



### Add a New Monthly Goal - Add Goals

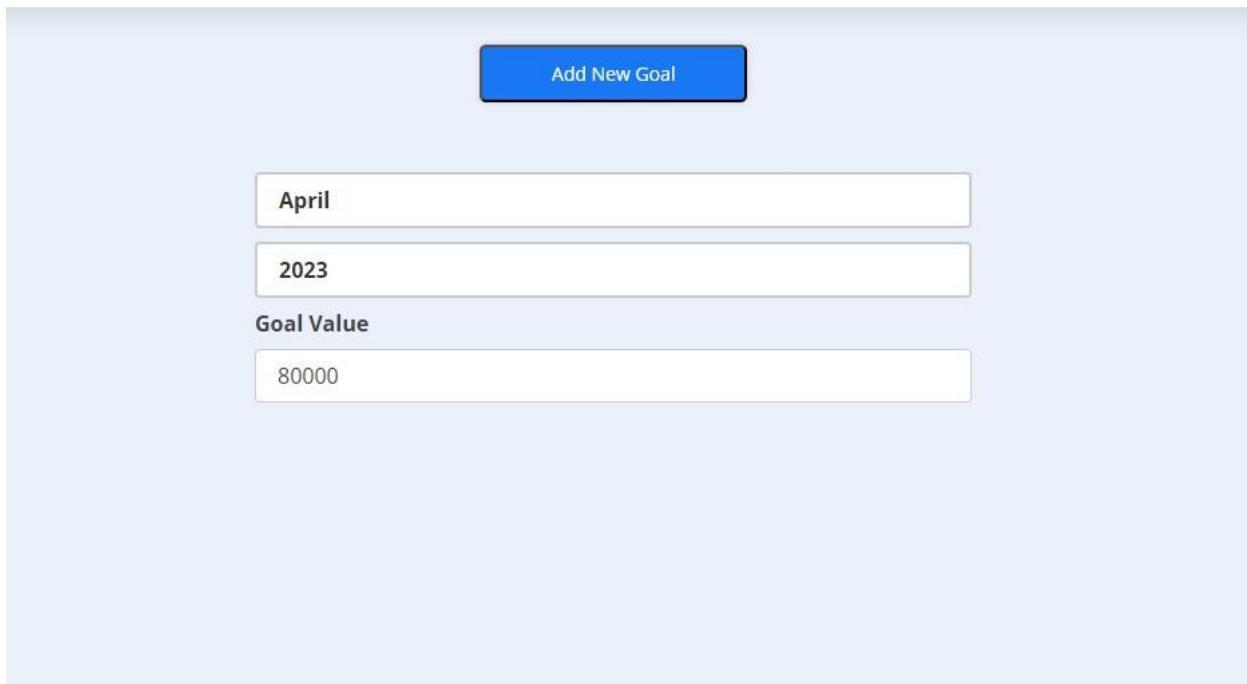
1. To create a new Monthly Goal, Click on the “New Goals ” Link on the navigation bar on the main dashboard page



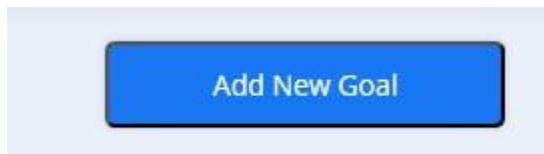
2. You will see this page



3. You will have to select a month of the year, and the year you want the goal set for, you will also have to input the amount you want the new goal to be.



4. Click on the Add New Goal button once you have all fields filled out for your new goal.



5. After clicking the button you will be redirected to the goals page where you can see the new goal you created.

The screenshot shows a user interface for managing goals. On the left, there's a sidebar with icons for Dashboard, Numbers, Analytics, Monthly Goals, and Add Goals. The main area has a header with a 'Delete Selected Goals' button. Below is a table with columns for Month, Year, and Goal. Each row contains a checkbox and the corresponding month and year along with its goal value.

	MONTH	YEAR	GOAL
<input type="checkbox"/>	August	2023	13000
<input type="checkbox"/>	June	2023	70000
<input type="checkbox"/>	April	2023	80000
<input type="checkbox"/>	March	2023	20000
<input type="checkbox"/>	January	2023	10000
<input type="checkbox"/>	November	2022	5000
<input type="checkbox"/>	October	2022	4000

## Compare Resources Daily Hours and Revenue - Numbers Page

1. Click on the Number tab on the left hand side

The dashboard features a dark sidebar with icons and text links: Dashboard, Numbers, Analytics, Monthly Goals, Add Goals, and Upload CSV. The main area displays a large orange text "HAPPY WEDNESDAY" at the top, followed by a yellow gradient box containing "MARCH 2023 Total Revenue" and a large bold number "14041.86".

2. You are then taken to the numbers page where you can see the production of the entire team, their production, and their available hours behind

The numbers page has a sidebar with links: Dashboard, Analytics, and a dropdown menu for Users Report containing Holly, Isabella, Maryam, Sharon, and Zuhair. The main area shows a table with columns: DR, DATE, AVAILABLE UNITS, DOWNTIME UNITS, GROSS PRODUCTION, and MEMO. The table data is as follows:

DR	DATE	AVAILABLE UNITS	DOWNTIME UNITS	GROSS PRODUCTION	MEMO
SB	2022-11-02	46.5	15.5	2258	
IM	2022-04-26	48	48	2342.0599975586	test
ZW	2021-01-04	54	54		

3. By clicking on the check-boxes you can select certain Doctor's information, clicking on Submit Changes will delete the check-box you have selected

					<b>Submit Changes</b>
	DR	DATE ▾	AVAILABLE UNITS	DOWNTIME UNITS	
<input type="checkbox"/>	SB	2022-11-02	46.5	15.5	

4. Clicking on the top left box will select all the check-boxes in that row

<input checked="" type="checkbox"/>	DR	DATE ▾	AVAILABLE UNITS	DOWNTIME UNITS
<input checked="" type="checkbox"/>	SB	2022-11-02	46.5	15.5
<input checked="" type="checkbox"/>	IM	2022-04-26	46.5	15.5
<input checked="" type="checkbox"/>	ZW	2021-01-04	46.5	15.5

5. As a Manager you can also leave notes for your Doctors to see in the memo section, press on submit changes to save your note.

[Submit Changes](#)[Refresh Page Imports](#)

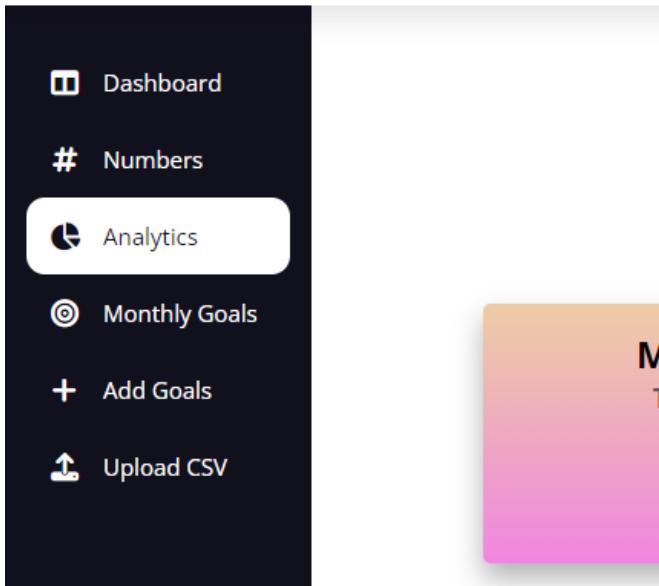
E	DOWNTIME UNITS	GROSS PRODUCTION	MEMO
	15.5	2258	
	48	2342.0599975586	test
	54		

[Submit Changes](#)[Refresh Page Imports](#)

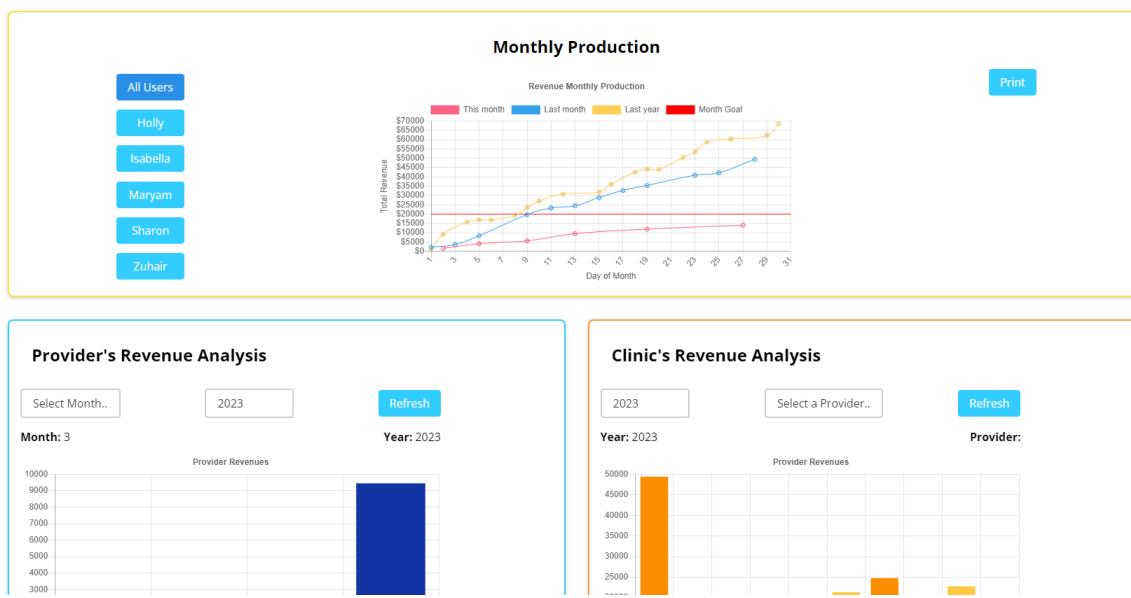
<input type="checkbox"/>	DR	DATE ▾	AVAILABLE UNITS	DOWNTIME UNITS	GROSS PRODUCTION	MEMO
<input type="checkbox"/>	SB	2022-11-02	46.5	15.5	2258	Keep up the good work
<input type="checkbox"/>	IM	2022-04-26	48	48	2342.0599975586	test

## Check Clinic Revenue Trend - Analysis Page

1. To check all charts and trends on Analysis Page, Click on the “Analysis” Link on the navigation bar on the main dashboard page

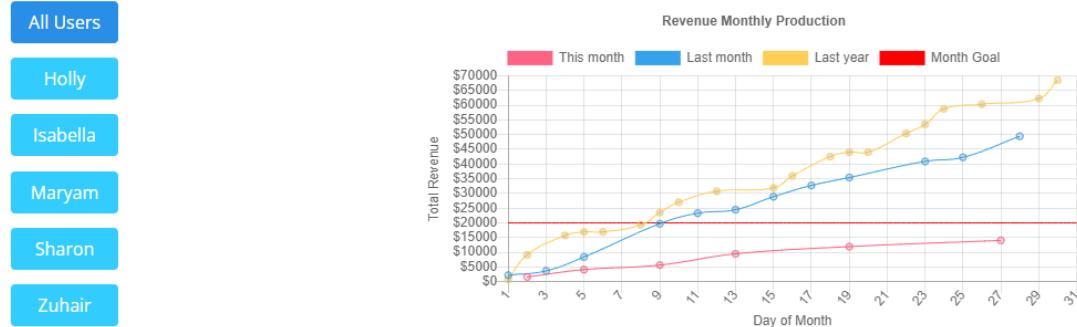


2. You will see this page with 3 charts



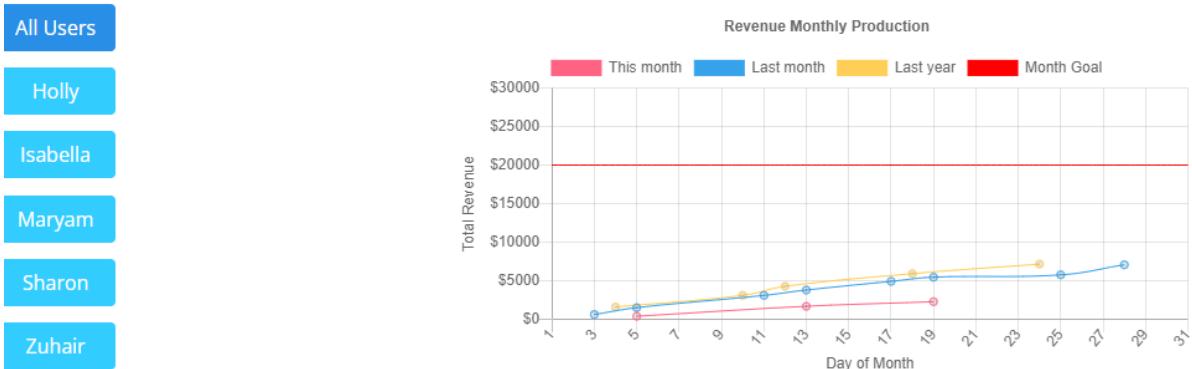
3. The first chart on the top is a line graph that compares the Revenue Trend for the Clinic for Current Month with the Previous Month and Last Year Current Month. The Pink line represents the current month's revenue trend till current date, blue line represents that last month's revenue trend over the month and the yellow line represents the revenue trend for last year current month/

## Monthly Production



4. You can choose a particular service provider to check the revenue earned only by that service provider. The below graph is for Dr Isabella

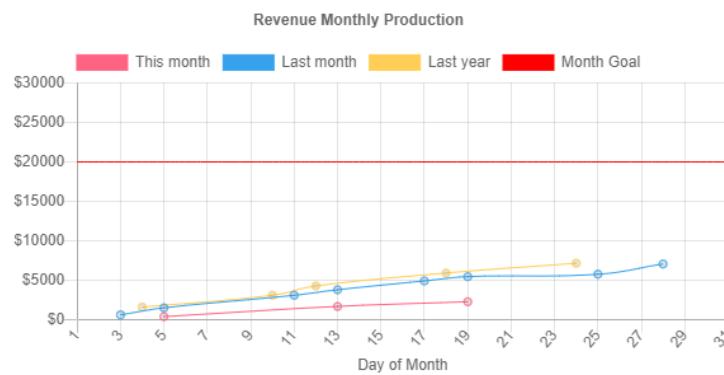
## Monthly Production



5. To switch back to all Users view, Click on “All Users” Button
6. This chart can be printed by clicking the print button on the right. The print dialog box will appear where you can choose your printing conditions and printer.

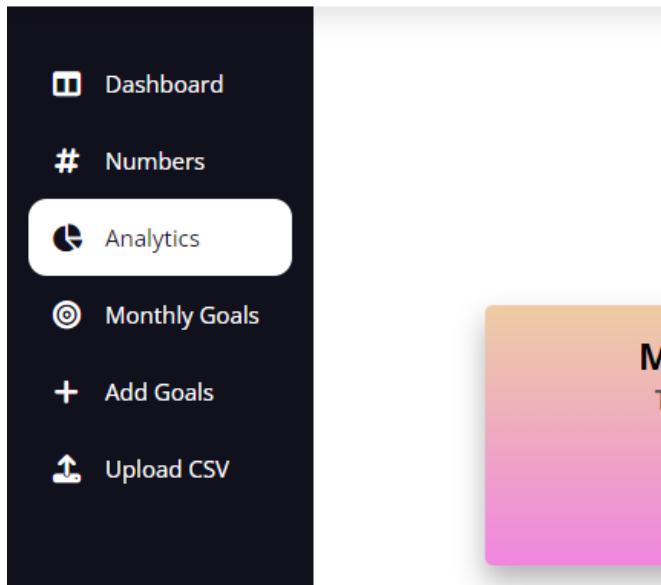
## Monthly Production

Print

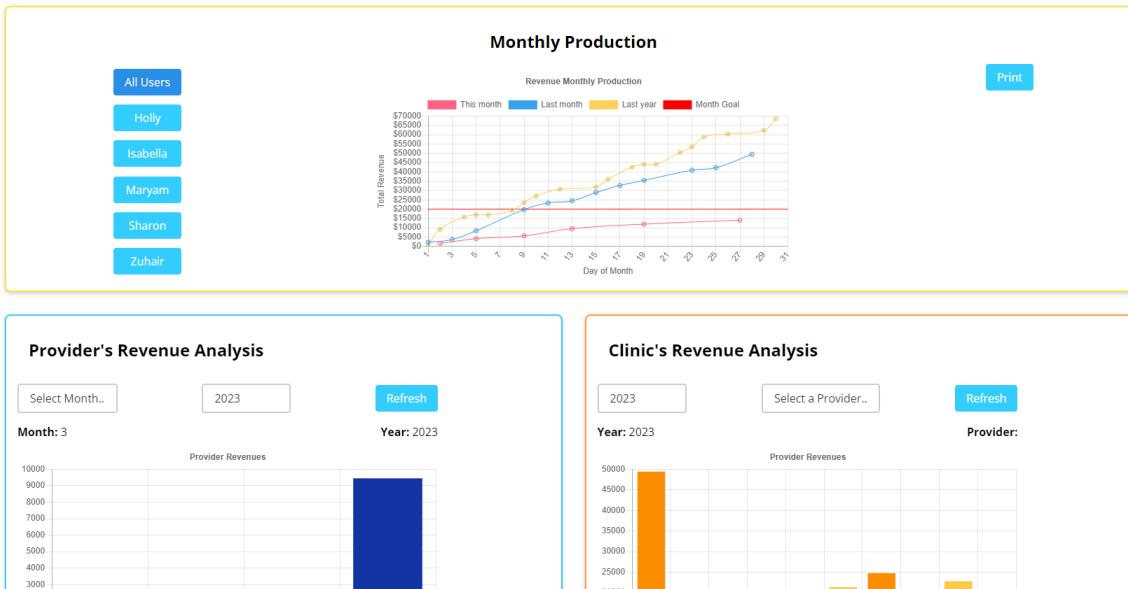


## Compare Provider Revenue for a Month - Analysis Page

1. To check all charts and trends on Analysis Page, Click on the “Analysis” Link on the navigation bar on the main dashboard page

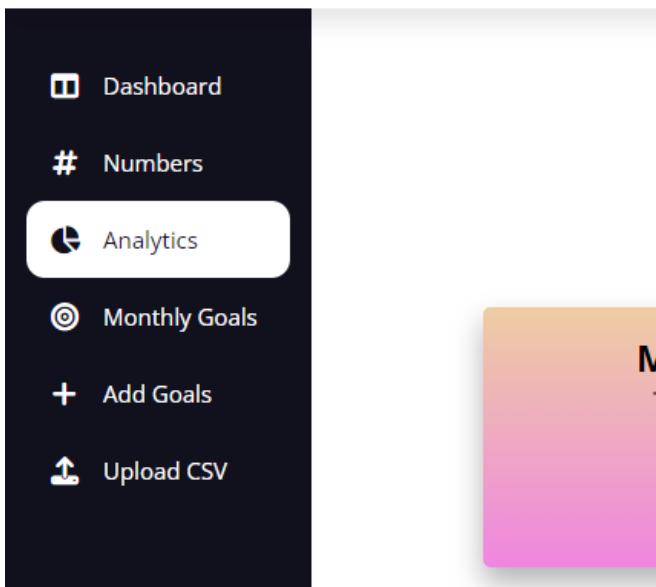


2. You will see this page with 3 charts

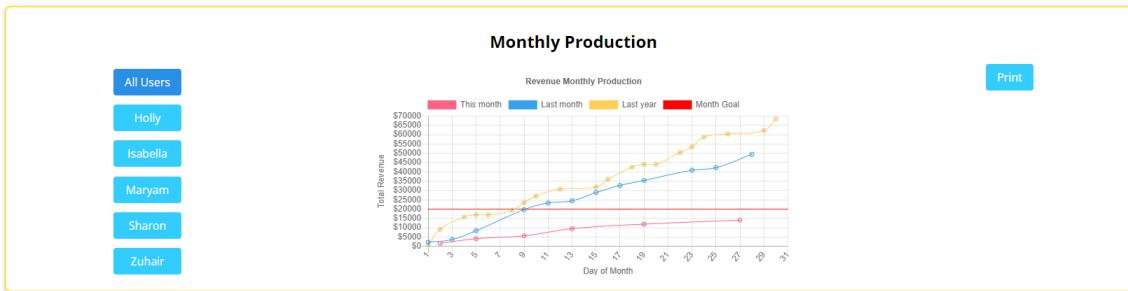


## Compare Clinic Revenue (Month-wise for a Year)- Analysis Page

1. To check all charts and trends on Analysis Page, Click on the “Analysis” Link on the navigation bar on the main dashboard page



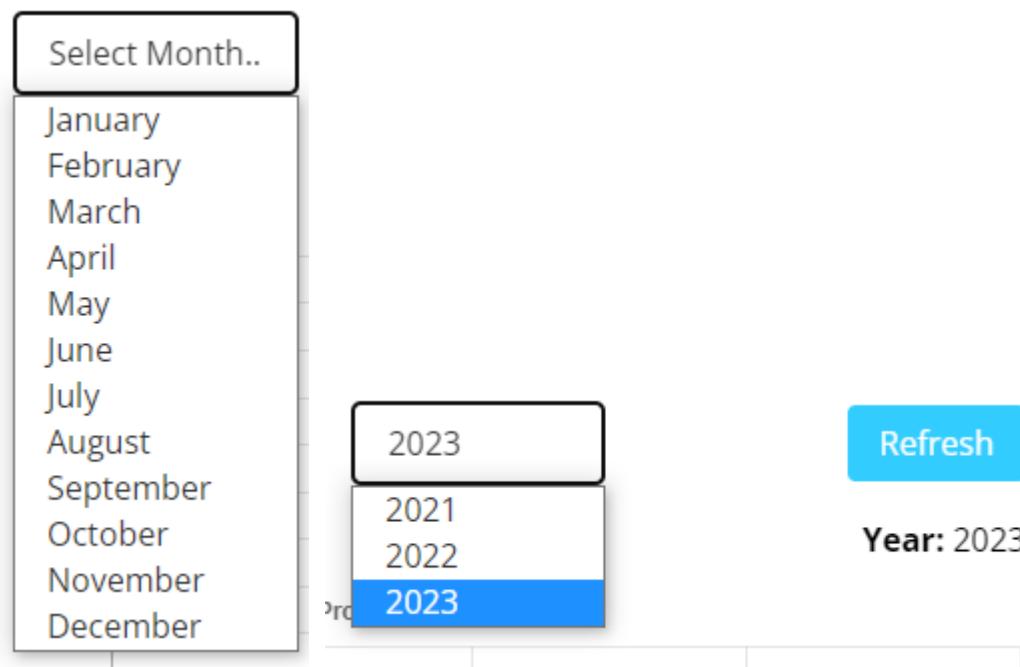
2. You will see this page with 3 charts



3. The chart on the bottom left corner, demonstrates a comparative Revenue Analysis for each provider for the current month of the year by default.

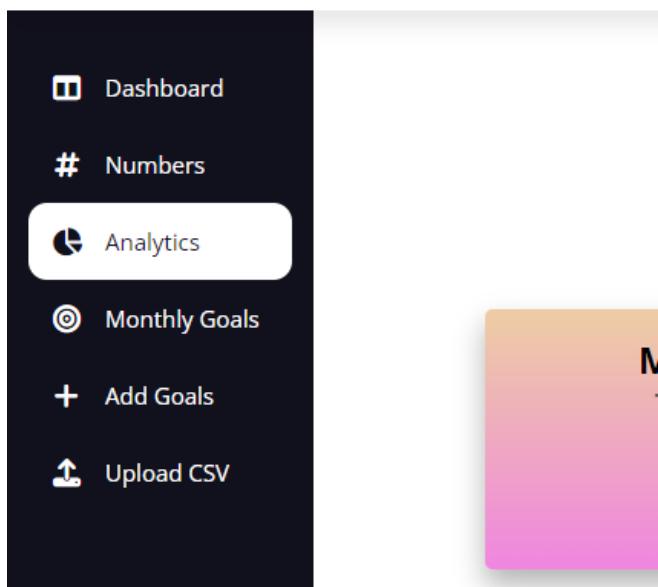


4. To compare provider revenues for a different month or year, just choose the desired date from the dropdowns and hit “Refresh” Button



## Compare Revenue by a Provider (Month-wise for a Year) - Analysis Page

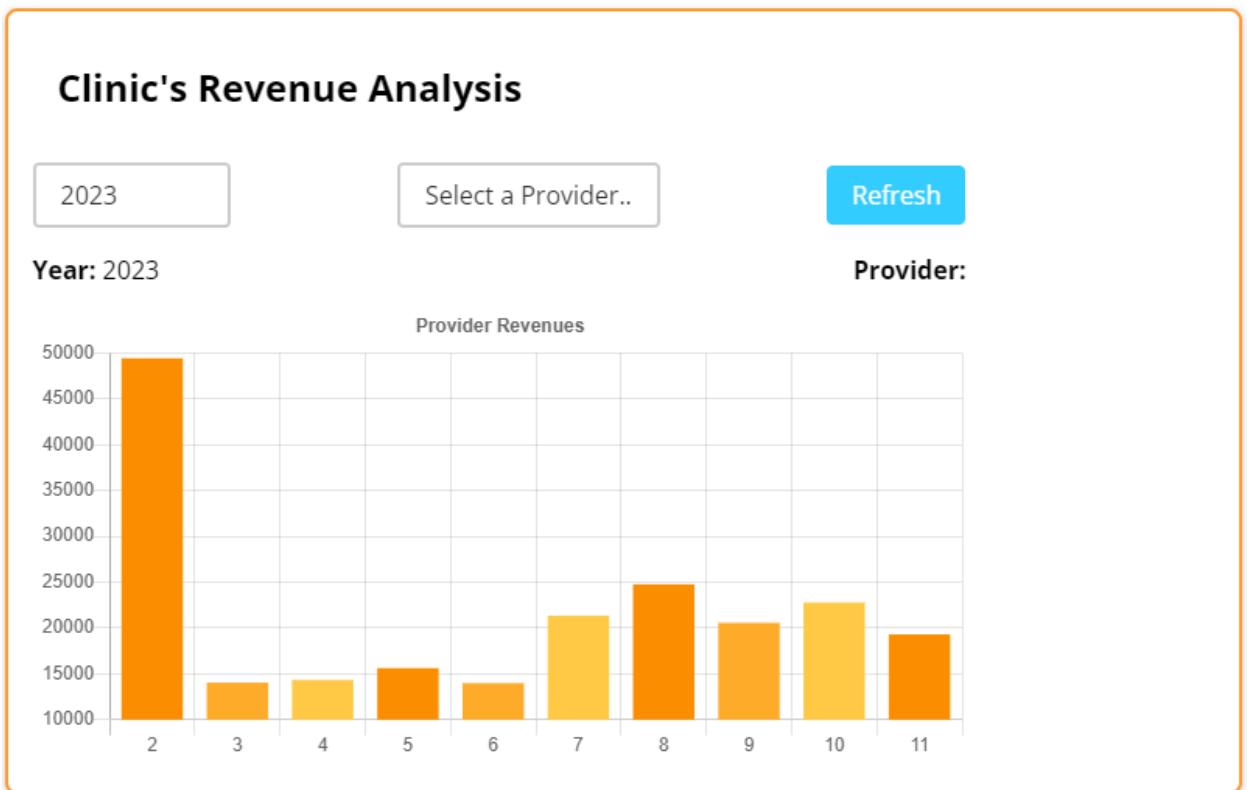
1. To check all charts and trends on Analysis Page, Click on the “Analysis” Link on the navigation bar on the main dashboard page



2. You will see this page with 3 charts

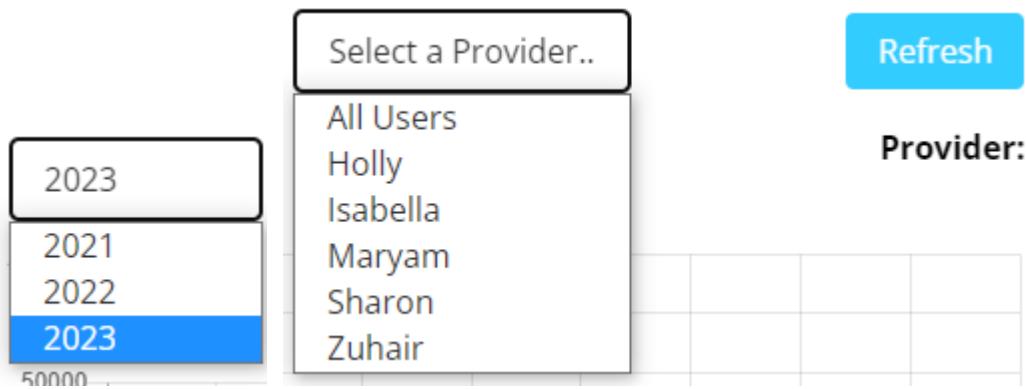


- The chart on the bottom right demonstrates the revenue performance of your clinic for each month of the year. By default, the revenue analysis is done for the current year



- You can also choose a particular provider if you wish to do a revenue analysis by a certain provider for a particular year by choosing values from the dropdown and hitting

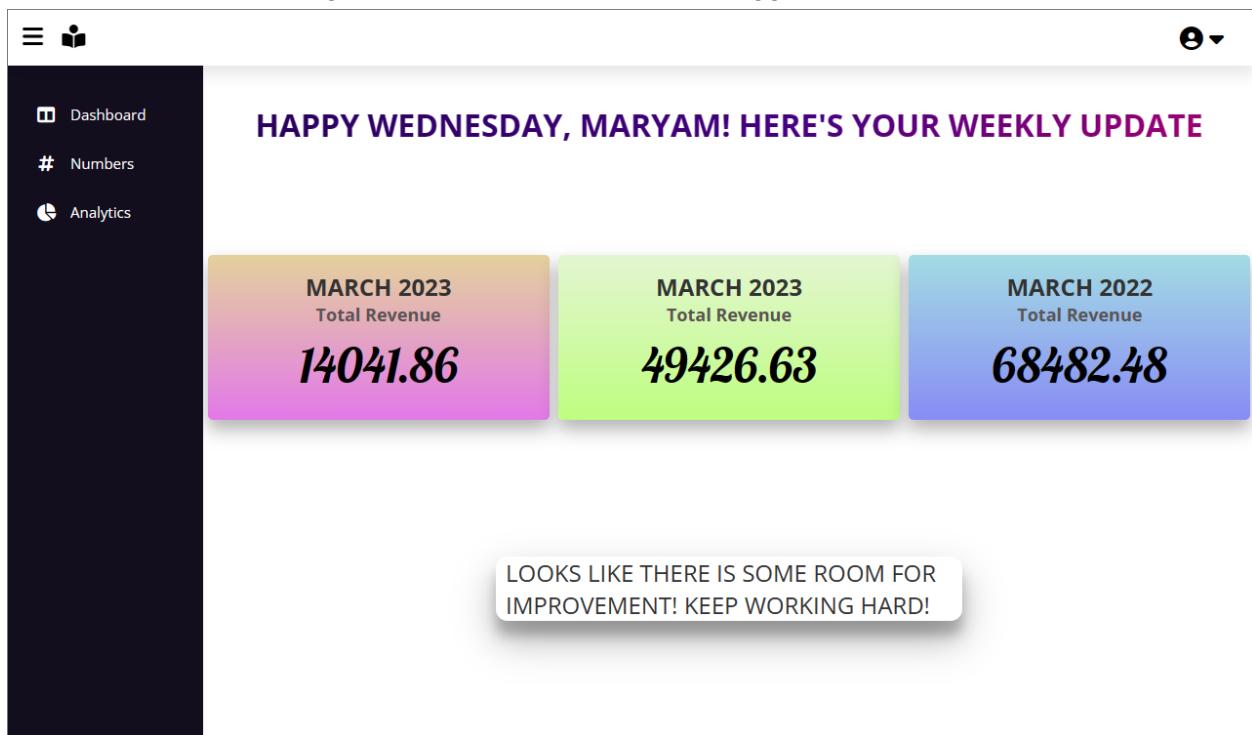
the refresh button. Click on the “All Users” Button and current year to get back to the default view.



## User Role Type - Dentist/Hygienist

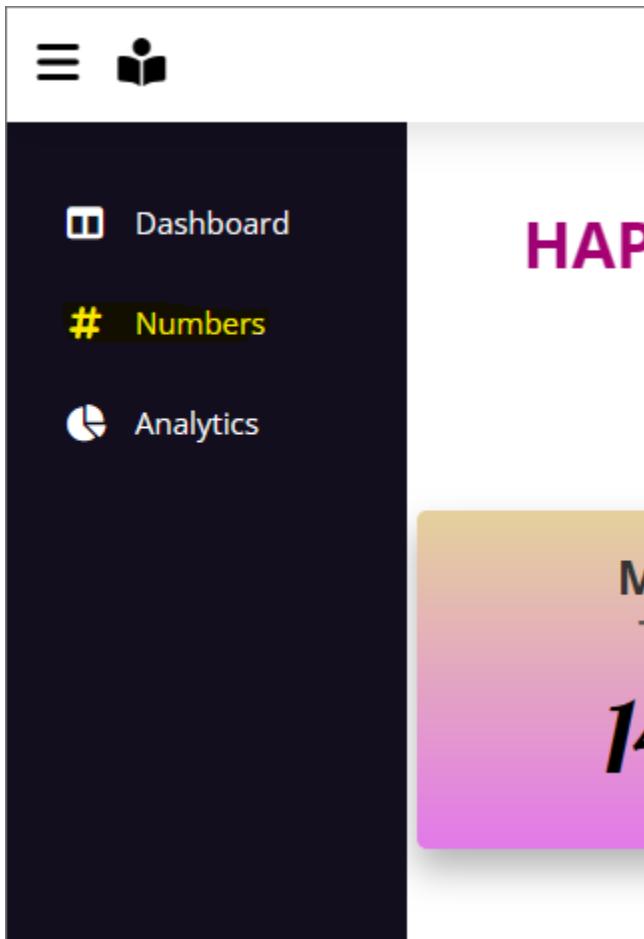
### Home Screen - Dashboard Page

1. This is the dashboard page that a Dentist will see when logged in



### Compare Individual Daily Hours and Revenue - Numbers Page

1. On dashboard page click the Numbers tab to be taken to the numbers page

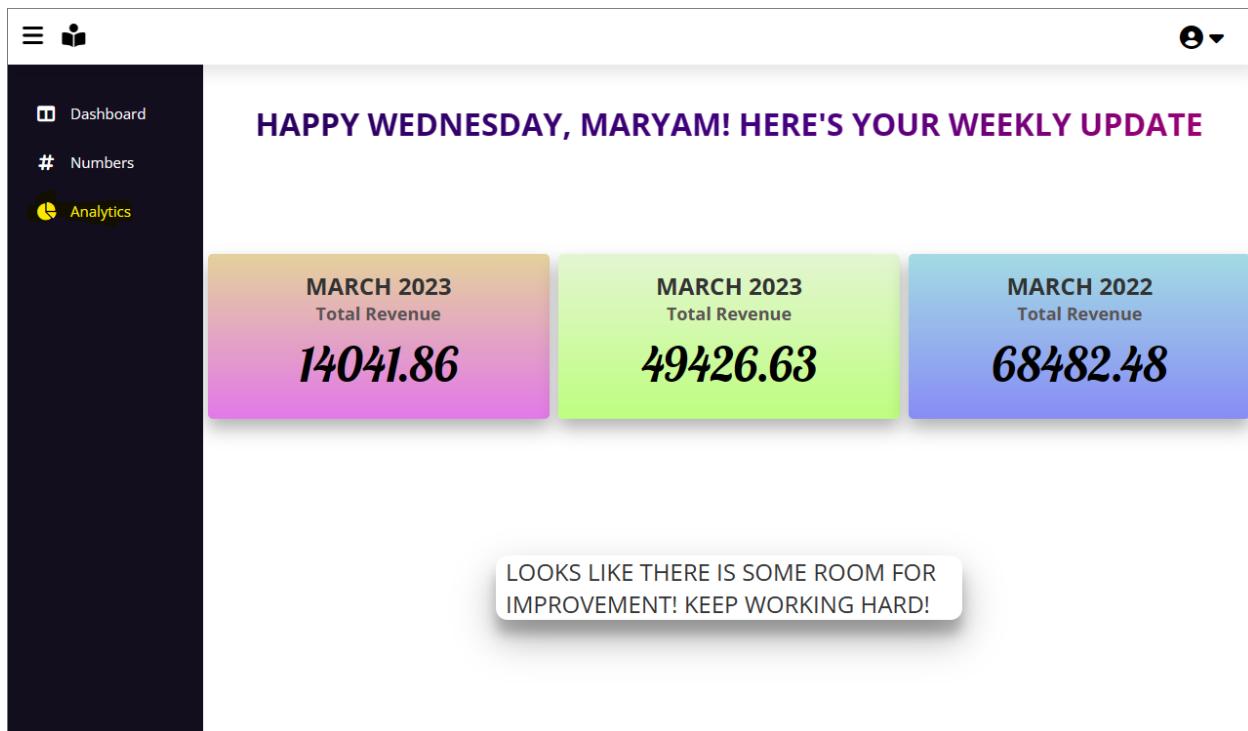


2. Once on the page the Dentist will be able to compare the revenue they generated verses their available hours used and how many hours they have to themselves

DR	DATE	AVAILABLE UNITS	DOWNTIME UNITS	GROSS PRODUCTION	MEMO
SB	2022-11-02	46.5	15.5	2258	

## Check Individual Revenue Trend - Analysis Page

1. When logged in as a Dentist click on the Analytics tab to be taken to the analytics page



2. Once on the Analytics page the Dentist will be able to see their revenue based on the current month, last month and last year same month on a line graph. Additionally the Dentist will be able to see the monthly revenue goal set by the manager.



3. By pressing the print button you will be able to print out the graph

# Systems Manual - Developer's Guide

## Product Identification Information

**Product Name:** Longworth Dashboard Story

**Model Number:** V1.0

## Hardware Specification

**Server:** loki.trentu.ca

**Database:** phpMyAdmin (loki)

The above specifications provided pertain to the Development (DEV) and Testing (TST) environment for Version 1.0 (V1.0) of the product including both the Server and Database. It should be noted that Longworth Dental Clinic is responsible for providing the server and database for the deployment of the application to Production (PROD) environment, which will require modifications to the source code when establishing connections to the Server and Database. .

## Tech Stack and Libraries

**Web Design Languages:** HTML, CSS,

**Front-end Languages:** PHP, JavaScript

**Back-end Languages:** MySQL

**Data Visualization Libraries:** Chart.js, CanvasJS

**PHP Version:** 8.1.16

**MySQL Version:** 2019

## Product Information

Longworth Dashboard Story is a Data Analysis Web Application that allows the Business owners to access a comprehensive overview of the company performance through data visualization tools. One platform to be able to track all their patients, to track their service providers' success, and to make informed decisions and come up with solutions based on the analytical visualizations of various condensed reports based on client's requests..This will improve the efficiency and results of the decision making process for the business while also keeping their finances in check.

## Database Tables

Below is the list of all the Database Tables, their Columns names and descriptions that are currently used for the application. Please note that when adding additional functionalities , there may or may not be a need for new additional database tables.

### role

The database table stores the information about the different types of user roles available. This database table is needed to define access for users.

Key	Column Name	Data Type	Description	Foreign Key TableName
PK	role_id	int(11)	PK used to define role type in other tables	
	position_name	varchar(255)	Dentist, Manager, Hygienist, Receptionist, General Manager (HR)	

### month\_goal

The database table stores the information about the monthly goals of the clinic which the Manager can add.

Key	Column Name	Data Type	Description	Foreign Key TableName
PK	goal_id	int(11)	Identification Number of the goal	
	month	int(2)	What Month's Goal	
	year	int(4)	What Year for the Month	
	base_value	int(7)	The goal of the month	

### operatories

The database table stores the information about the different operating rooms in the clinic.

Key	Column Name	Data Type	Description	Foreign Key TableName
PK	op_id	int(11)	Operating Id of the Room	
	name	varchar(250)	Full NAmes of the operating Room	

### patient

The database table stores limited information about the patients of the clinic

<b>Key</b>	<b>Column Name</b>	<b>Data Type</b>	<b>Description</b>	<b>Foreign Key TableName</b>
PK	patient_id	int(11)	Patient Identification Number	
	first_name	varchar(256)	First Name of the Patient	
	last_name	varchar(256)	Last Name of the Patient	

## app\_type

The database table stores the information about the different types of appointments the clinic takes booking by patients for.

<b>Key</b>	<b>Column Name</b>	<b>Data Type</b>	<b>Description</b>	<b>Foreign Key TableName</b>
PK	app_type_id	int(11)	Identification Number for the type of appointment	
	app_name	varchar(256)	Name of the type of the appointment	
	app_Description	varchar(256)	Description of the appointment type	

## user\_name

The database table stores the information about all the employees

<b>Key</b>	<b>Column Name</b>	<b>Data Type</b>	<b>Description</b>	<b>Foreign Key TableName</b>
PK	user_code	varchar(5)	Identification Number of the User Employee	
	email	varchar(255)	Email which will be the username of the user	
	password	varchar(255)	Hash Password of the user	
	first_name	varchar(45)	First Name of the user	
	last_name	varchar(45)	Last Name of the user	
	verification	int(4)	Hashed Verification Password	
FK	role_id	int(!1)	What type of role is assigned to the user	role
	entrydate	timestamp	NOW() - the date and time when user account is registered	

## ledger

The database table stores the information about the revenue earned

Key	Column Name	Data Type	Description	Foreign Key TableName
PK	transaction_id	int(11)	Identification for the Transaction	
	transaction_date	date	Date of transaction	
	total	float	Total Revenue earned from the transaction	
FK	user_code	varchar(5)	Provider who took care of this appointment related to this transaction	user_name

## appointment

The database table stores the information about the appointments.

Key	Column Name	Data Type	Description	Foreign Key TableName
PK	app_id	int(11)	Identification Number to identify the appointment	
FK	app_type_id	int(11)	Type of appointment	app_type
Fk	patient_id	int(11)	Which Patient's appointment this was	patient
FK	user_code	varchar(5)	Which provider took care of the appointment	user_name
FK	op_id	int(11)	Operating room in which the appointment was taken care of	operatories
	start_time	datetime	Start time of the appointment	
	end_time	datetime	End time of the appointment	

## provider\_schedule

The database table stores the information about the schedule of the providers

Key	Column Name	Data Type	Description	Foreign Key TableName
PK	schedule_id	int(11)	Identification to identify the schedule	
FK	user_code	varchar(5)	Which provider's schedule is this	user_name
	schedule_date	date	Date of the schedule	
	start_time	time	Start time of shift	
	end_time	time	End time of shift	
	Memo	varchar(256)	To store comments related to this shift of a day	

## User Roles

In the system, there exist various user roles that influence the nature of access and information that users can access upon logging in. Specifically, the information pertaining to user roles is stored in the "role" database table.

### Role\_id = '1' (Dentist) and '3' (Hygienist)

Users with role id 1 (i.e., Dentists) and role id 3 (i.e., Hygienists) have identical access and view privileges. Such users can only access their respective individual revenue and performance metrics.

Source Code Files with this role\_id functionalities are:

- dashboard.php
- dashboardNumbers.php
- analysis.php

In all other source code pages with Manager Exclusive Access, limitations like hiding certain <div> sections and limiting editing access have been implemented.

### Role\_id = '2' (Manager) and '5' (General Manager (HR))

Users with role id 2 and role id 5 have similar view privileges but with extra data being displayed. They can access the revenue and performance metrics of all the providers in the entire clinic.

Besides the source codes that are for users with role id 1 and role id 3 functionalities, these users also have access to additional functionality with codes in the following source code files:

- dashboard.php
- dashboardNumbers.php
- analysis.php
- addGoal.php
- deleteGoal.php
- upload.php

### Role\_id = '4' (Receptionist)

Users with role id 4 (i.e., Receptionists) have an entirely different view and access privileges. As they are not authorized to access revenue data, they are only able to view existing timesheets, schedule reports of providers, and add or delete timesheets.

Source codes Files for such users are:

- timesheet.php
- scheduleReport.php.

## Source Code Files and Folders they are in

[Link to the Github Repository](#)

### HTML and PHP files - /4000Y/

- account.php
- addGoal.php
- analysis.php
- dashboard.php
- dashboardNumbers.php
- deleteGoal.php
- login.php
- logout.php
- password.php
- passwordVerification.php
- resetPassword.php
- scheduleReport.php
- signup.php
- timesheet.php
- upload.php

### PHP Include Files - /4000Y/includes

- footer.php
- library.php
- navAccount.php
- receptionistNav.php

### CSS Files - /4000Y/styles/

- main.css

### JavaScript File - /4000Y/script/

- main.js

### SQL Queries to Set up DB Tables - /4000Y/sql/

- mySQL.sql

### Images - /4000Y/images/

- appleicon.png
- googleicon.png
- linkedinicon.png

PowerShell Script - /4000Y/shellScripts/

- SQL\_exportApptdata.ps1
- SQL\_exportApptdata.txt
- SQL\_exportLedgerdata.ps1
- SQL\_exportLedgerdata.txt

## Export Appointment and Ledger Data from ClearDent Database

The application and the current database are not on the same server. Longworth Dental do not want ClearDent and Longworth Dashboard Story on the same server as of now. Therefore, a powershell script has been developed that will export Appointment and Ledger Data from the ClearDent Database as 2 csv files. *The job is scheduled to run Weekly Every Sunday at 10pm until interrupted.*

Source Code Files:

- SQL\_exportApptdata.ps1
- SQL\_exportLedgerdata.ps1

## Import Appointment and Ledger Data to Application Database

The exported csv files need to be uploaded on the Longworth Dashboard Story by the Manager. The Source Code with the functionalities are:

- upload.php

## User Logins and Credential

All functionalities related to the user's account are as follows:

- account.php - to view the information about their account
- login.php - log in to the application
- logout.php - logout functionality
- password.php - forgot Password functionality
- passwordVerification.php - First page when the forgot password is sent to verify user email
- resetPassword.php - reset password OTP code is sent. Verify the OTP
- signup.php - new user account registration

## Shared Pages Among Managers and Service Providers

Managers and Service Providers have the same code for the following pages. Please Note that the data differs (Manager can see all users data while providers only see their individual Data). Also, for the dashboardNumbers Page (“Numbers” Page on the application, the manager can edit the memo field while providers can not)

- Dashboard.php - “Dashboard”, the main landing Page
- dashboardNumbers.php - “Numbers” Page, the page with horus and revenue data displayed in tabular format
- analysis.php - “Analysis” Page, the data is analyzed and displayed in Chart format. Managers can see 3 graphs while Providers see only 1 chart.

## Exclusive Manager Functionalities

The following source code files store the functionalities that are exclusive to the Manager Role only:

- addGoal.php - “Add Goal”, The page allows Manager to add a new monthly goal for the clinic
- deleteGoal.php - “Delete Goal”, The page displays all the existing goals and allows the manager to delete an existing monthly goal if it was changed

## Receptionist Functionalities

Receptionist has a different view altogether. Source code files with the functionalities for receptionist are:

- scheduleReport.php - “Schedule Report”, The page displays all the existing timesheets and allows receptionist to delete a shift if schedule changed
- timesheet.php - “TimeSheet”, Receptionist can add new shifts and schedule for the providers via this page

## Link to Source Codes on Github

<https://github.com/jeremyoftheberemies/story>

<https://loki.trentu.ca/~sidaksinghsra/4000Y/login.php>