USER Role Guide

Welcome to Operations Tools! This guide covers all features available to users with the USER role.

🏠 Your Application: User App

As a USER, you have access to the **User App** at:

- **Local**: http://localhost:3001
- **Production**: Your assigned user-app URL

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Getting Started

First Login

1. **Access the User App** using the URL provided by your administrator
2. **Log in** with your email and temporary password
3. **Change your password** when prompted (first login only)
4. You'll see the **User Dashboard** with your available tools

Navigation

The User App sidebar shows:

- **Dashboard** - Your home page

- **Time Tracking** - Record your work hours

- **Links** - Quick access to external resources

Time Tracking

Record and manage your work hours for accurate time tracking and reporting.

Recording Time

1. Navigate to **Time Tracking** from the sidebar
2. Click **"Record Time"** or **"+ New Entry"**
3. Fill in the form:

    - **Date**: When you worked (defaults to today)

    - **Hours**: Number of hours worked (e.g., 2.5)

    - **Project**: Select the project you worked on

    - **Description**: Brief description of work done (optional)

4. Click **"Save"** to record the entry

Viewing Your Time Records

Dashboard View:

- See your recent time entries

- Quick summary of hours this week/month

- Visual charts of time distribution

Time Tracking Page:

- Full history of all time entries

- Filter by date range, project, or description

- Sort by date, hours, or project

- Export to CSV for external reporting

Editing Time Entries

1. Find the entry in your time tracking list

2. Click the **"Edit"** icon

3. Update the fields

4. Click **"Save"** to apply changes

Deleting Time Entries

1. Find the entry to delete

2. Click the **"Delete"** icon

3. Confirm deletion when prompted

⚠️ **Note**: Deleted entries cannot be recovered.

Best Practices

- **Record daily**: Log your time at the end of each day while it's fresh

- **Be specific**: Use clear project names and descriptions

- **Round appropriately**: Most systems use quarter-hour (0.25) increments

- **Review weekly**: Check your entries every Friday to ensure accuracy

Links & Resources

Quick access to external resources and documentation.

Accessing Links

1. Navigate to **Links** from the sidebar

2. Browse categorized links:

   - **General Resources** - Company docs, wikis, tools
   - **Project Guidelines** - Project-specific documentation
   - **External Tools** - Third-party services you may need

Using Links

- Click any link to open in a new tab
- Links are organized by category for easy discovery
- Bookmark frequently used links in your browser

Requesting New Links

If you need a link added:

1. Contact your manager or administrator

2. Provide the URL and suggested category

3. Administrator will add it to the Links page

Profile Management

Manage your account settings and profile information.

Accessing Your Profile

1. Click your **profile icon** in the top-right corner

2. Select **"Profile"** from the dropdown

Updating Your Profile

Email:

- Your email is set by administrators
- Contact an admin to change your email address

Password:

1. Click **"Change Password"**
2. Enter your current password
3. Enter new password (must meet requirements):

   - At least 8 characters
   - Mix of letters and numbers recommended

4. Confirm new password
5. Click **"Update Password"**

Display Preferences:

- Theme settings (if available)
- Notification preferences
- Language settings (if available)

Security

Password Best Practices:

- Use a unique password for this application
- Include uppercase, lowercase, numbers, and symbols
- Avoid common words or personal information
- Change your password if you suspect it's compromised

Logout:

1. Click your profile icon
2. Select **"Logout"**

3. You'll be redirected to the login page

> 🔒 **Security Tip**: Always logout when using a shared computer.

Bug Reporting

Report issues or problems you encounter while using the application.

When to Report a Bug

Report bugs when you experience:

- Features not working as expected
- Error messages
- Data not saving properly
- Pages not loading
- Unexpected behavior

How to Report a Bug

1. Click the **"Report Bug"** button (usually in header or footer)
2. Fill out the bug report form:

   - **Title**: Brief description (e.g., "Time entry won't save")
   - **Description**: Detailed explanation of the problem
   - **Steps to Reproduce**: What you did before the error occurred
   - **Expected Behavior**: What should have happened
   - **Actual Behavior**: What actually happened
   - **Screenshot**: Optional, but very helpful

3. Click **"Submit Report"**

Good Bug Reports Include

✅ **Clear title**: "Cannot delete time entries" ✅ **Detailed steps**: "1. Go to Time Tracking, 2. Click delete on any entry, 3. Error appears" ✅ **What you expected**: "Entry should be deleted" ✅ **What happened**: "Got error: 'Permission denied'" ✅ **Screenshot**: Shows the exact error message

❌ **Bad bug report**: "It's broken" - too vague, no details

After Reporting

- You'll receive a confirmation that your report was submitted
- Administrators will review and prioritize the issue
- You may be contacted for additional information
- Check back for updates on the bug status

Urgent Issues

For critical issues (data loss, security concerns, system outage):

1. Report the bug as usual
2. **Also contact** your manager or IT support immediately
3. Provide your bug report number for reference

Frequently Asked Questions

Can I access other tools or features?

As a USER, you have access to the User App only. If you need access to additional features (Analysis Tools, Scoring, Fleet Management), request a role upgrade from your administrator.

How do I know what my role is?

Your role is displayed in your profile. Click your profile icon in the top-right corner to see your current role.

Can I change my own role?

No, only administrators can assign or change user roles. If you need different permissions, contact your administrator with a business justification.

Why can't I see certain menu items?

Some features are restricted to higher roles (QA, CORE, FLEET, ADMIN). Your USER role provides access to essential features for general users.

My time tracking isn't saving - what should I do?

1. Check your internet connection
2. Refresh the page and try again
3. If the problem persists, report it as a bug
4. Save your time entry details in a text file as backup

How do I request new features?

1. Discuss with your manager first
2. Submit a detailed feature request through the bug reporting system
3. Mark it as "Feature Request" in the title
4. Explain the business need and expected benefit

Can I export my data?

Yes, you can export your time tracking data to CSV from the Time Tracking page. Other data exports may require administrator assistance.

Tips for Success

Efficiency Tips

1. **Use keyboard shortcuts** (if available) for common actions
2. **Bookmark your most-used pages** for quick access
3. **Record time daily** to avoid forgetting hours worked
4. **Keep descriptions consistent** for easier reporting later

Getting Help

In-App Help:

- Look for "?" icons next to features for tooltips
- Check the Links page for documentation

Support Channels:

- Bug reports for technical issues
- Manager for permissions or role questions
- Administrator for account issues

Best Practices

- **Log in daily** to stay current with updates
- **Keep your password secure** and change it periodically
- **Report bugs promptly** to help improve the system
- **Provide feedback** when requested to help shape future features

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Need More Access?

If your role responsibilities require additional features:

QA Tools – For quality assurance work, request QA role **Scoring Tools** – For evaluation tasks, request CORE role **Fleet Management** – For project management, request FLEET role **Administration** – For system administration, request ADMIN role

Contact your manager or administrator to discuss role changes.

Support & Feedback

Technical Issues: Use the bug reporting feature **Feature Requests**: Discuss with your manager, then submit via bug reports **Account Issues**: Contact your administrator **Questions**: Check this guide first, then ask your manager

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