User Documentation for Department Management System

Introduction

This document provides user guidance on managing the Department Management System. The system allows users to perform CRUD (Create, Read, Update, Delete) operations on department data.

Features

The system supports the following features:

- View all departments.

- Create a new department.

- Edit department details.

- Soft-delete departments (mark them as inactive).

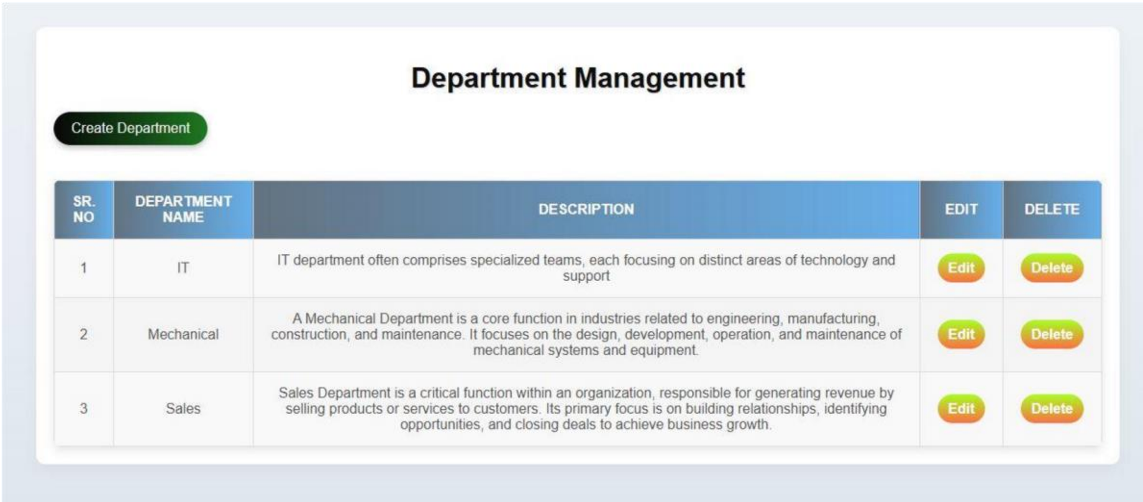
Usage Instructions

1. Home Page

The Home Page displays a list of all active departments. Each department entry provides the following information:
- Department Name
- Description
- Edit and Delete options

Buttons and links:
- 'Create Department' button: Navigate to the page to add a new department.
- 'Edit' link: Update the department's details. - 'Delete' link: Soft-delete a department.

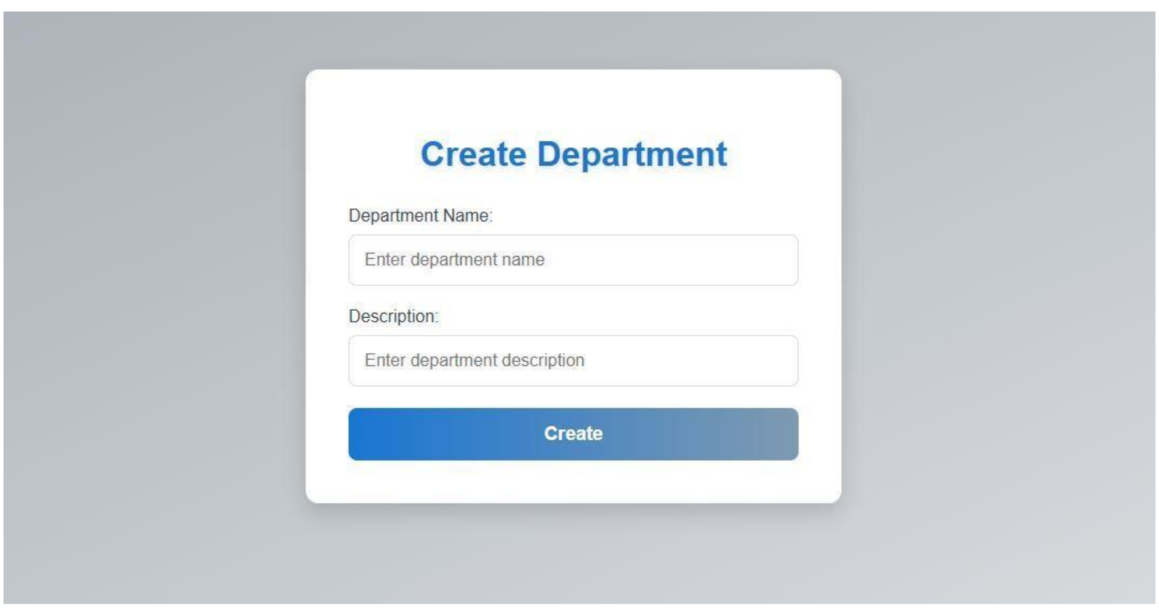
Link: https://sauinternship.pythonanywhere.com/



2. Create Department

To add a new department, follow these steps:
1. Navigate to the Create Department page by clicking the 'Create Department' button.
2. Fill in the required fields:
- Department Name
- Description
3. Click 'Create' to save the department.

Link: https://sauinternship.pythonanywhere.com/createdepartment

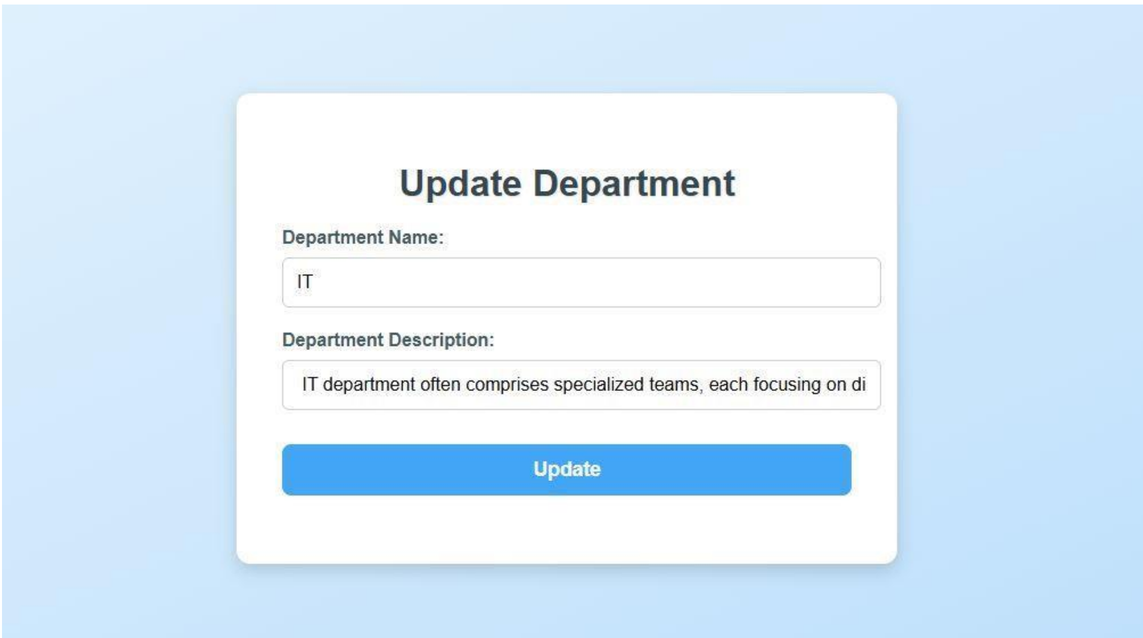


3. Update Department

To update an existing department:

1. Click the 'Edit' link in the respective row of the department on the Home Page.
2. Update the 'Department Name' and/or 'Description' fields.
3. Click 'Update' to save the changes.

Link: https://sauinternship.pythonanywhere.com/edit/1



4. **Delete Department**

To soft-delete a department:

1. Click the 'Delete' link in the respective row of the department on the Home Page.
2. The department will be marked as inactive and will no longer appear in the list of active departments.

Department Management

Create Department

SR. NO	DEPARTMENT NAME	DESCRIPTION	EDIT	DELETE
1	IT	IT department often comprises specialized teams, each focusing on distinct areas of technology and support	Edit	Delete
2	Mechanical	A Mechanical Department is a core function in industries related to engineering, manufacturing, construction, and maintenance. It focuses on the design, development, operation, and maintenance of mechanical systems and equipment.	Edit	Delete
3	Sales	Sales Department is a critical function within an organization, responsible for generating revenue by selling products or services to customers. Its primary focus is on building relationships, identifying opportunities, and closing deals to achieve business growth.	Edit	Delete

1. Role Page

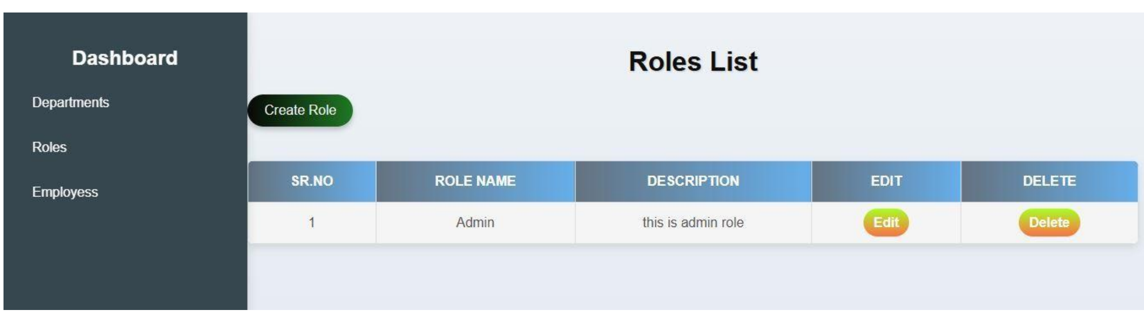
The Home Page displays a list of all active role. Each role entry provides the following information: - Role Name

- Description
- Edit and Delete options

Buttons and links:

- 'Create Role' button: Navigate to the page to add a new role.
- 'Edit' link: Update the role's details. - 'Delete' link: Soft-delete a role.

Link: https://sauinternship.pythonanywhere.com/



Dashboard

Departments

Roles

Employess

Roles List

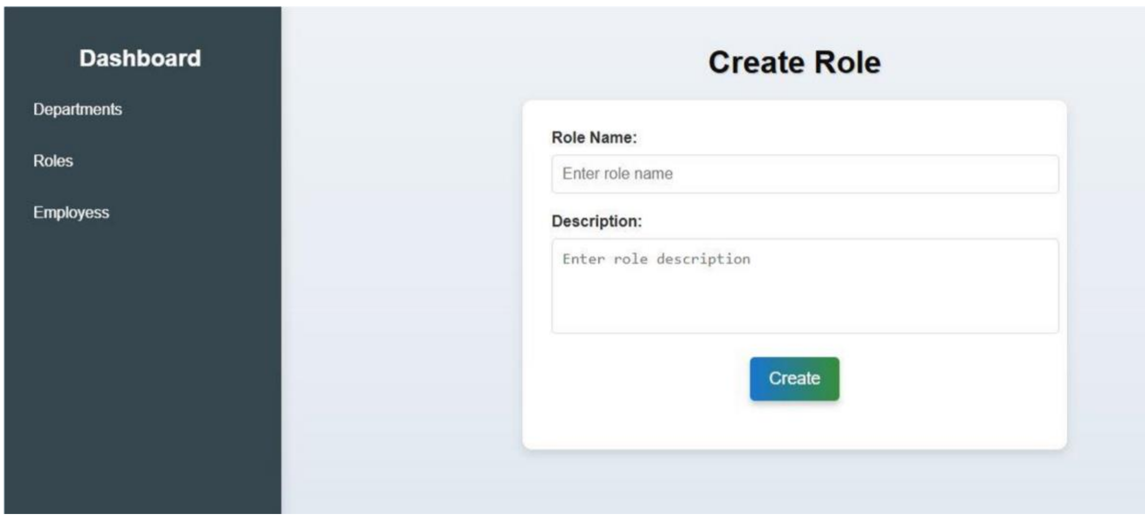
Create Role

SR.NO	ROLE NAME	DESCRIPTION	EDIT	DELETE
1	Admin	this is admin role	Edit	Delete

2. Create Role

To add a new role, follow these steps:
1. Navigate to the Create Role page by clicking the 'Create Role' button.
2. Fill in the required fields:
- Role Name
- Description
3. Click 'Create' to save the role.

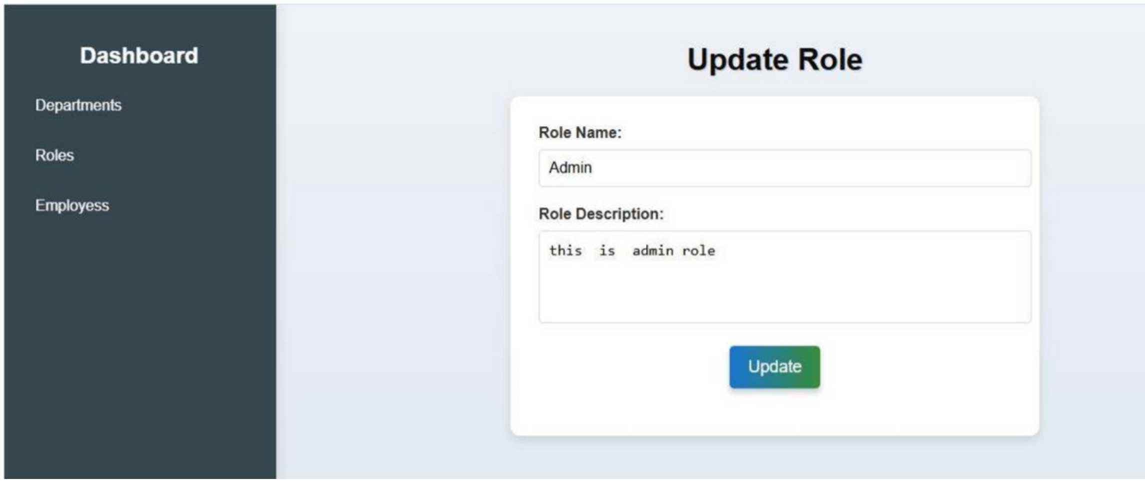
Link: https://sauinternship.pythonanywhere.com/addrole



3. Update Role

To update an existing role:
1. Click the 'Edit' link in the respective row of the role on the Home Page.
2. Update the 'Role Name' and/or 'Description' fields.
3. Click 'Update' to save the changes.

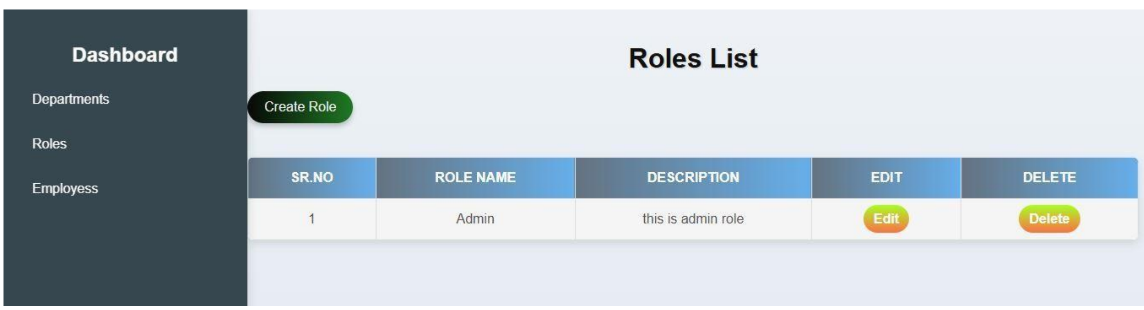
Link: https://sauinternship.pythonanywhere.com/updaterole/1



4. **Delete Role**

To soft-delete a role:

1. Click the 'Delete' link in the respective row of the role on the Home Page.
2. The role will be marked as inactive and will no longer appear in the list of active role.



View Employees

The homepage displays a list of all active employees in a tabular format. To view employees:
1. Go to the homepage ('https://sauinternship.pythonanywhere.com/viewemployees/') 2. The table will display the following details:

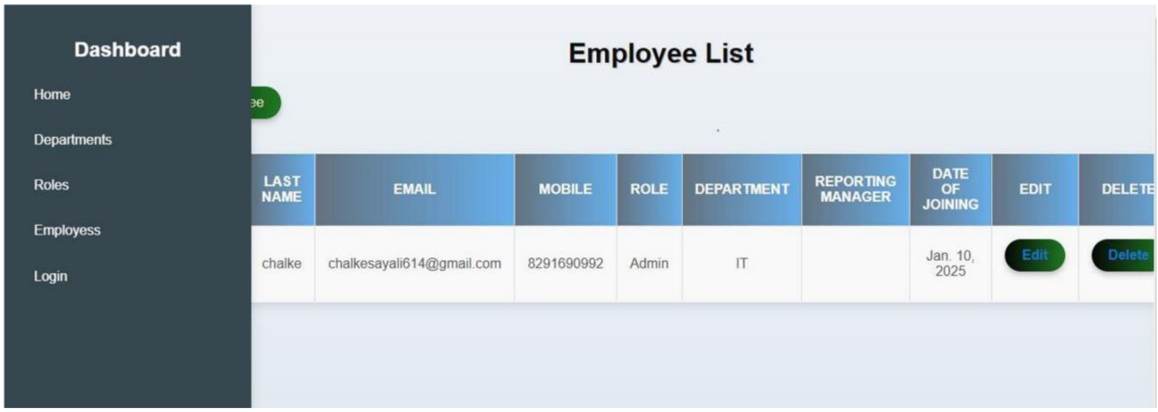
- Employee ID
- First Name
- Last Name - Email

- Mobile Number

- Role

- Department
- Reporting Manager
- Date of Joining
- Username
- Password

Options to Edit or Delete a employee are also displayed



Add a New Employee

To create a new employee:

1. Navigate to the 'Add Employee page by clicking on **'Create Employee** in the sidebar.

2. Fill in the form fields:

- Employee Name: Enter the name of the employee.

- Employee Description: Enter a short description.

Employee First Name

-Employee Last Name

-Employee Email

-Employee Mobile Number

-Employee Role

-Employee Department

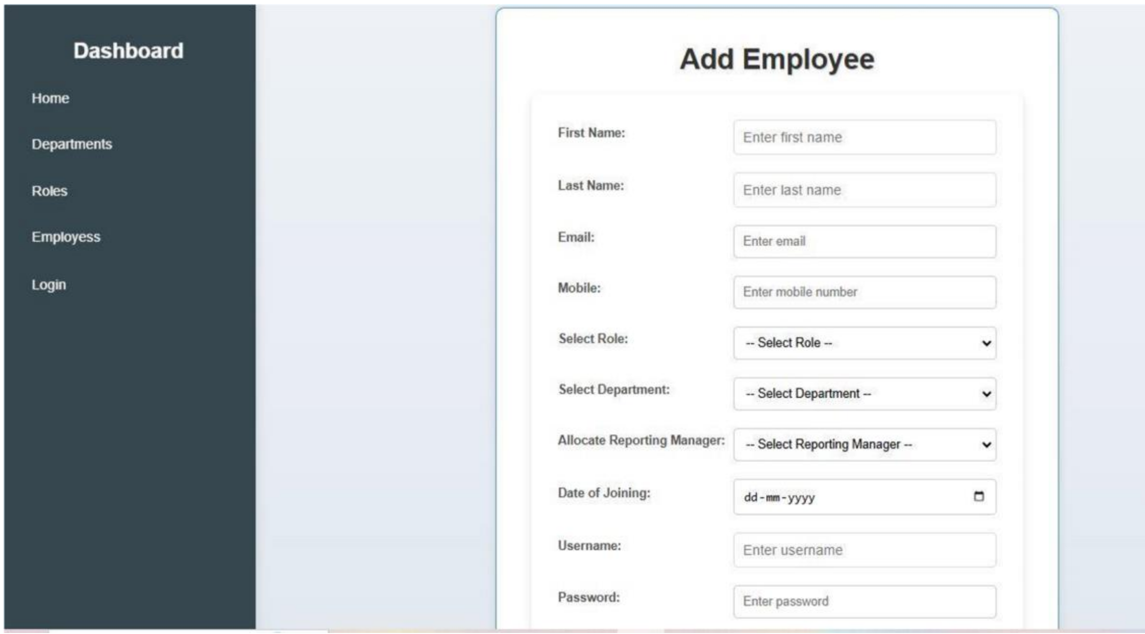
-Employee Reporting Manager

-Employee Date of Joining

-Employee Username

- Employee Password
3. Click on the Create button.

4. The new employee will now appear in the list



Edit/Update a Employee

To update a employee's details:

1. On the homepage, locate the employee you want to update.

2. Click on the Edit button in the corresponding row.

3. Modify the fields in the form:

- Employee Name

- Employee Description

- Employee First Name

- Employee Last Name

- Employee Email

-Employee Mobile Number

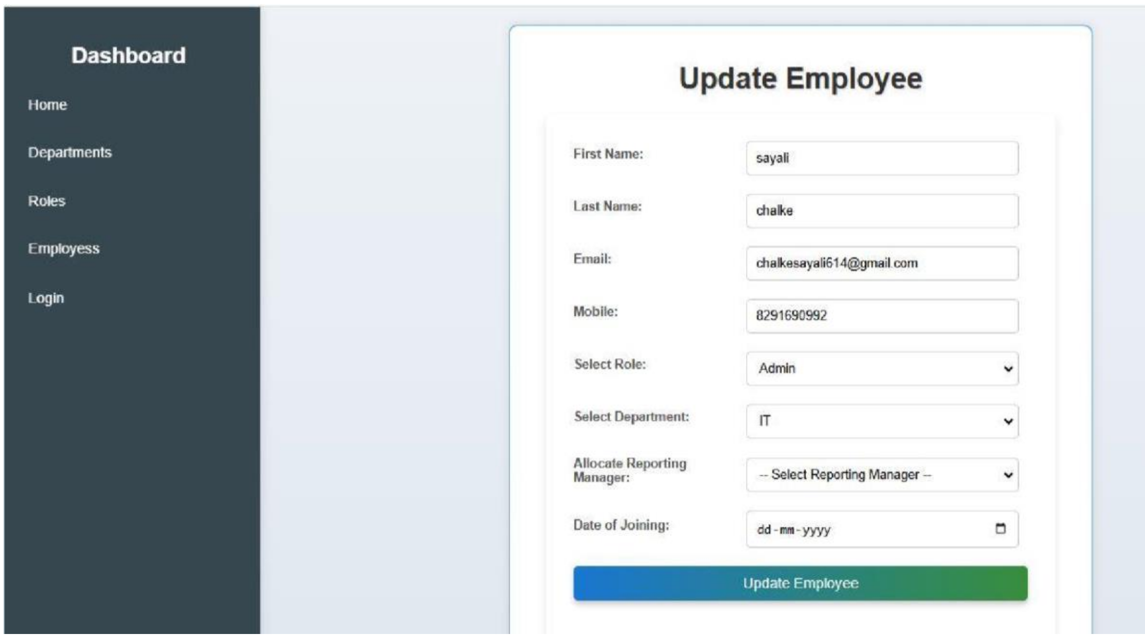
- Employee Role

- Employee Department
- Employee Reporting Manager

- Employee Date of Joining

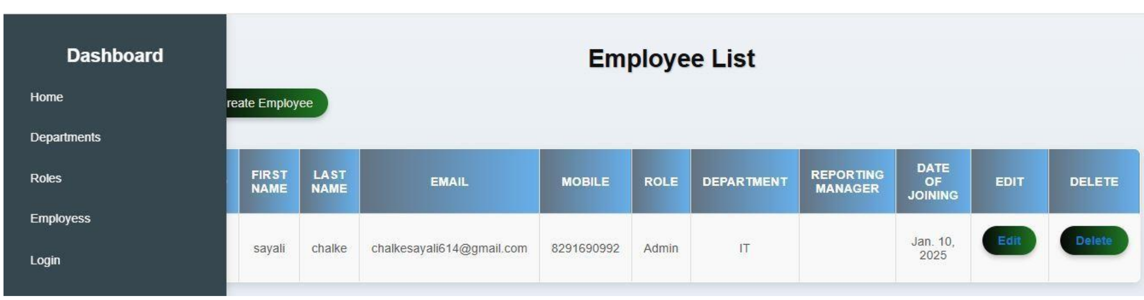
4. Click on the Update button to save the changes.

5. The updated details will be reflected in the list



Delete a Employee

To delete a Employee:
1. On the homepage, locate the employee you want to delete.
2. Click on the **Delete** button in the corresponding row.
3. The employee will no longer appear in the list.

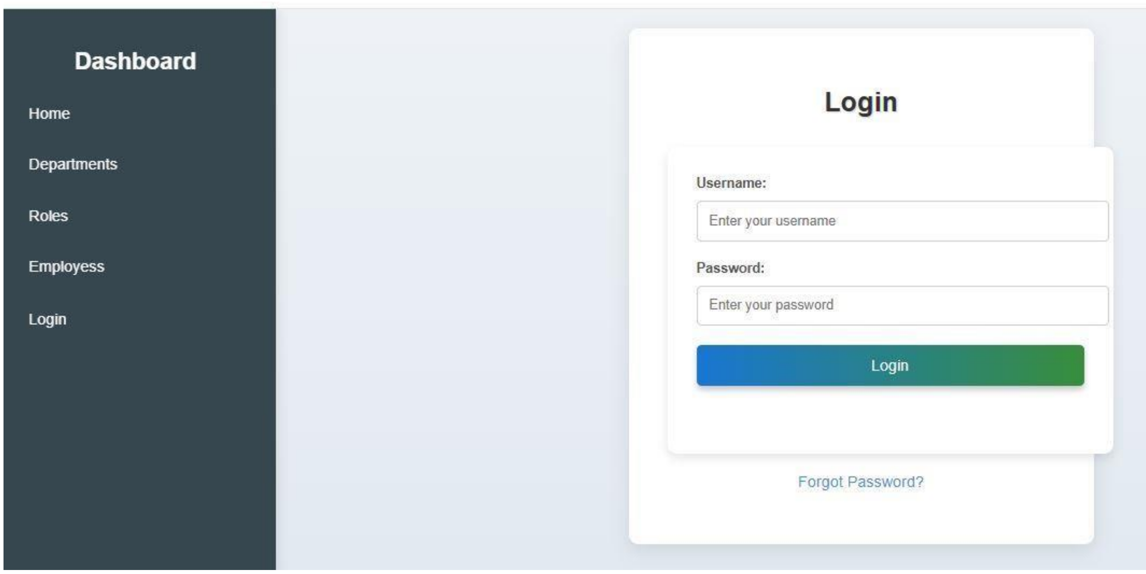


Features and Instructions of Login/Password Reset:-

Login User

The login displays a login form. To view login form

1:Go to the homepage ('https://sauinternship.pythonanywhere.com/login/')



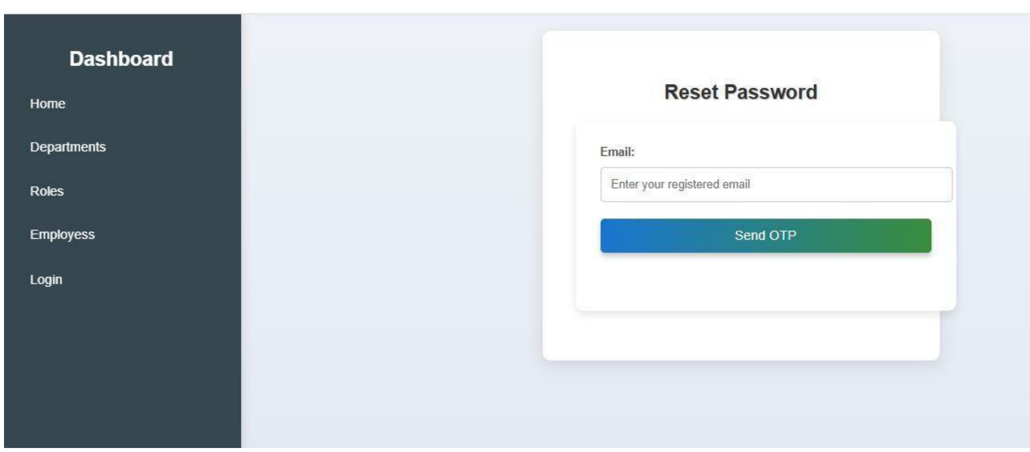
Reset Password Request

The Reset Password Request displays a email confirmation form to send OTP to that email.

To view reset password form:

1. Go to the homepage

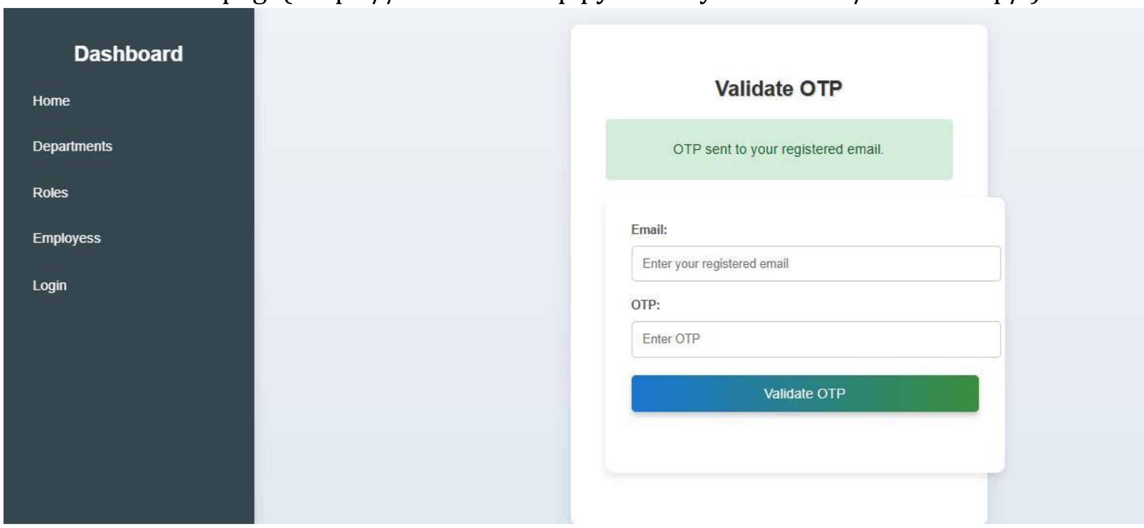
('https://sauinternship.pythonanywhere.com/resetpasswordrequest/')



Validate OTP Request

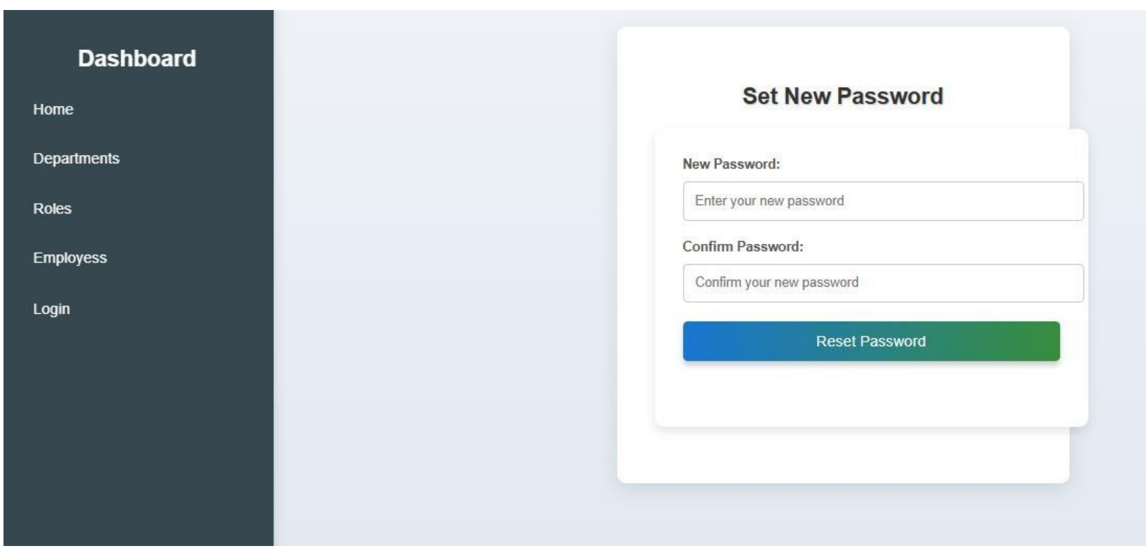
The Validate OTP Request displays a email and OTP confirmation form . To view Validate OTP form:

1. Go to the homepage('https://sauinternship.pythonanywhere.com/validateotp/')



Set New Password

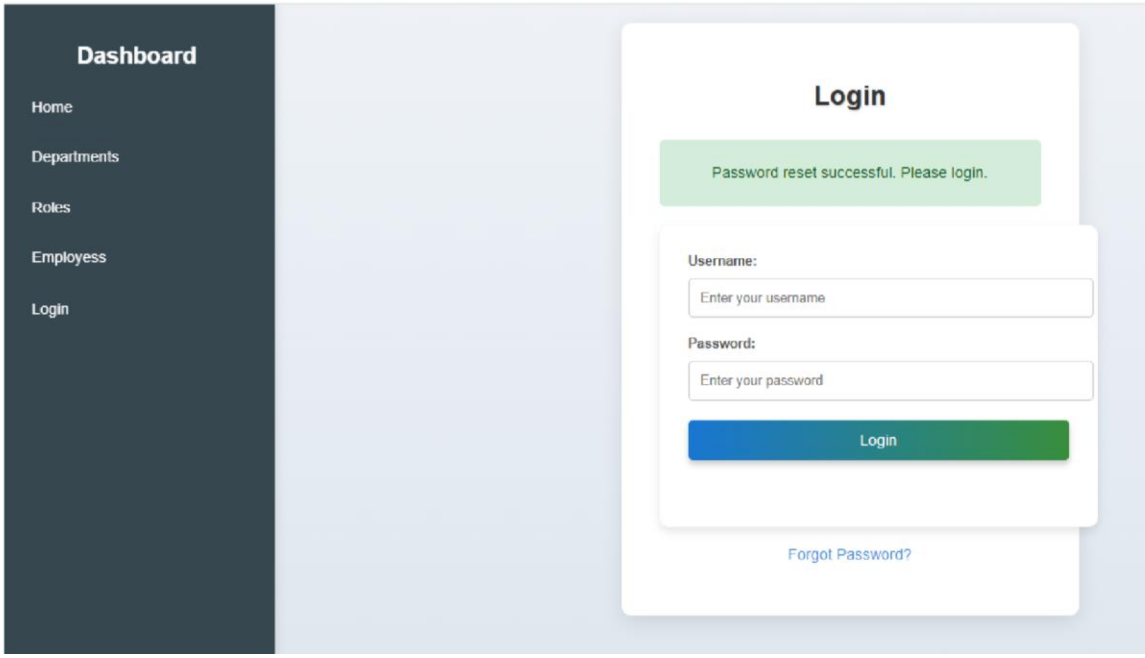
The Set New Password displays a new password form . To view set new password form:



Login Page with password reset message

The login displays a login form. To view login form

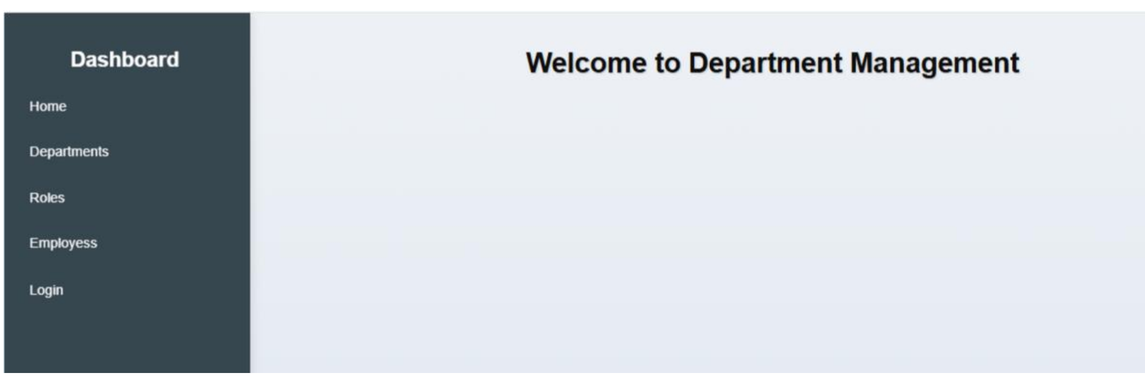
Go to the homepage('https://sauinternship.pythonanywhere.com/login/)



Home Page after login success

The home page displays a username and role. To view home page form:

1. Go to the homepage('https://sauinternship.pythonanywhere.com/home/')



Features and Instructions of Task Management:-

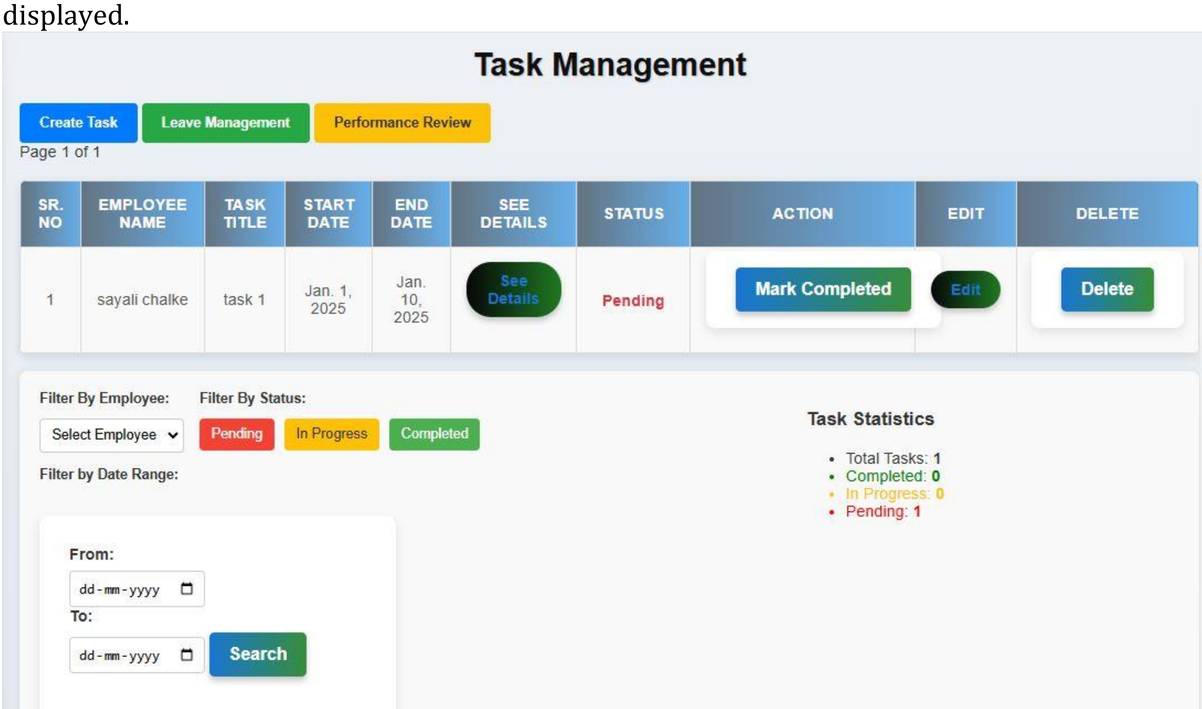
View Task Management

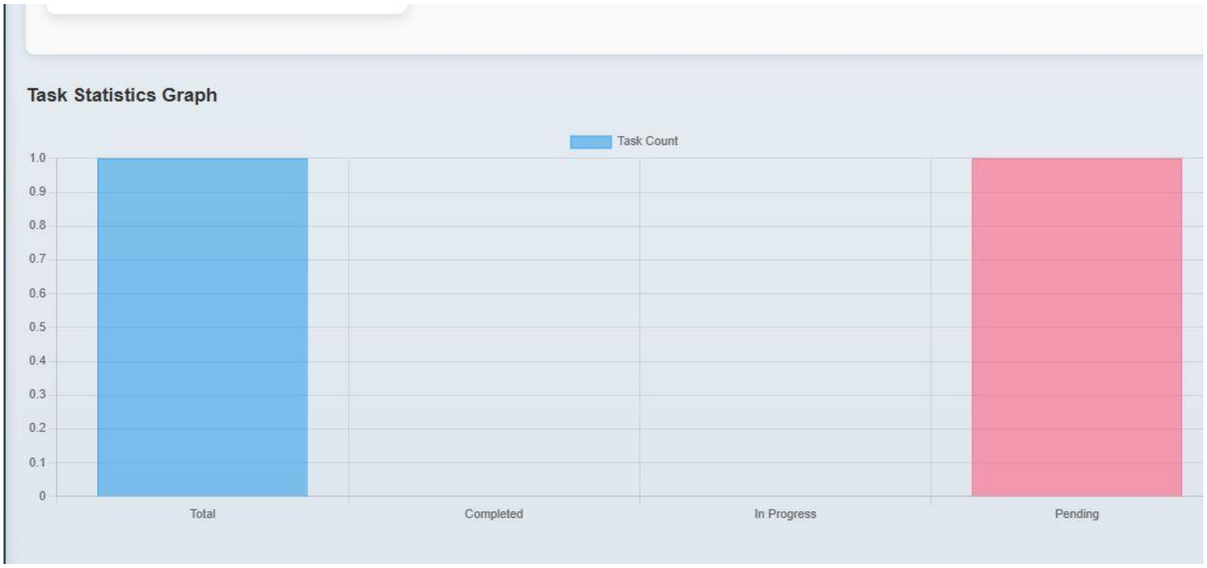
The view task page displays a list of all active Task management in a tabular format. To view Tasks:

1. Go to the homepage ('https://sauinternship.pythonanywhere.com/home/')
2. The table will display the following details:

- Task ID
- Employee Name
- Task Title
- Start Date
- End Date
- See Details
- Status
- Action
- Edit
- Delete

3. Options to See Details, Mark Completed, Edit or Delete Task, Filter and Graph are also displayed.





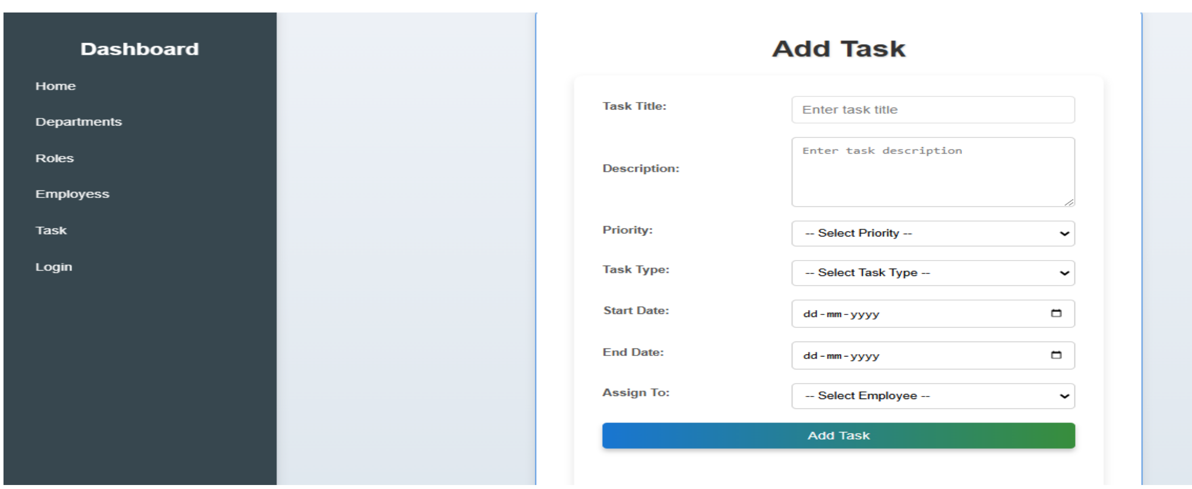
Add a New Task

To create a new task:

1. Navigate to the ‘Add Task’ page by clicking on **'Create Task** in the sidebar.
2. Fill in the form fields:

- **Task Title**: Enter Task Name
- **Task Description**: Enter Task Description
- **Priority**: High, Medium or Low
- **Task Type**: Individual or Team
- **Start Date**
- **End Date**
- **Assign To**: Select employee from dropdown

3. Click on the **Add Task** button.



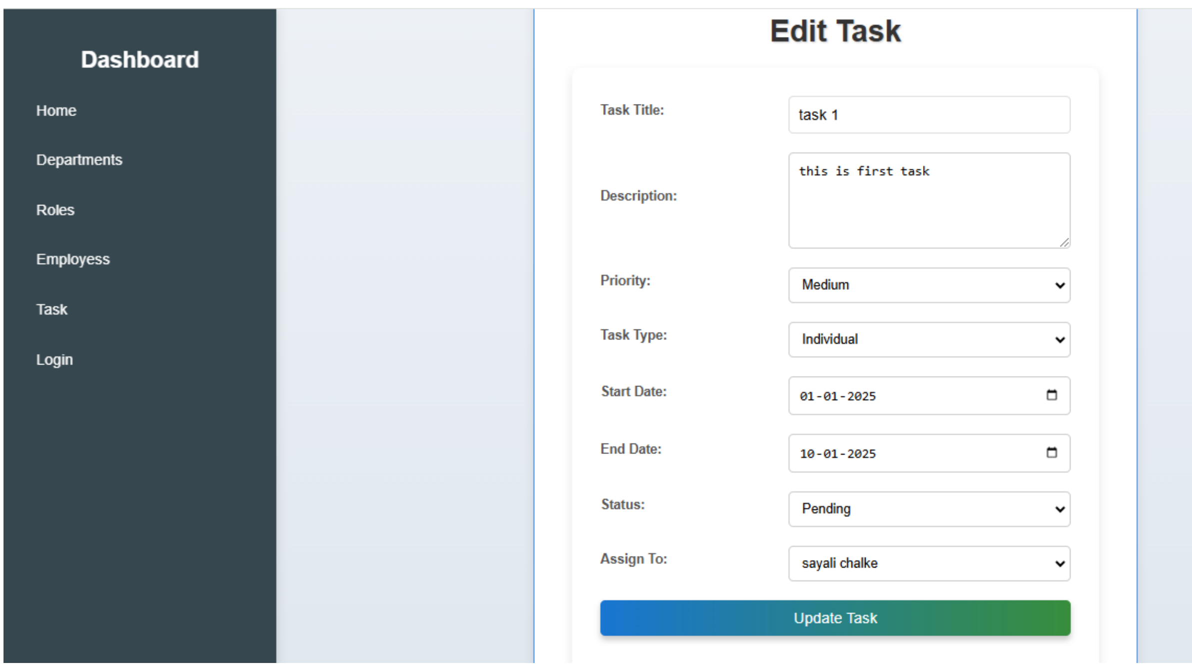
Edit a Task

To edit a task:

1. Navigate to the 'Edit Task' page by clicking on **'Edit** in the task list.
2. Edit the form fields:

- **Task Title**: Enter Task Name
- **Task Description**: Enter Task Description
- **Priority**: High, Medium or Low
- **Task Type**: Individual or Team
- **Start Date**
- **End Date**
- **Assign To**: Select employee from dropdown

3. Click on the **Update Task** button.

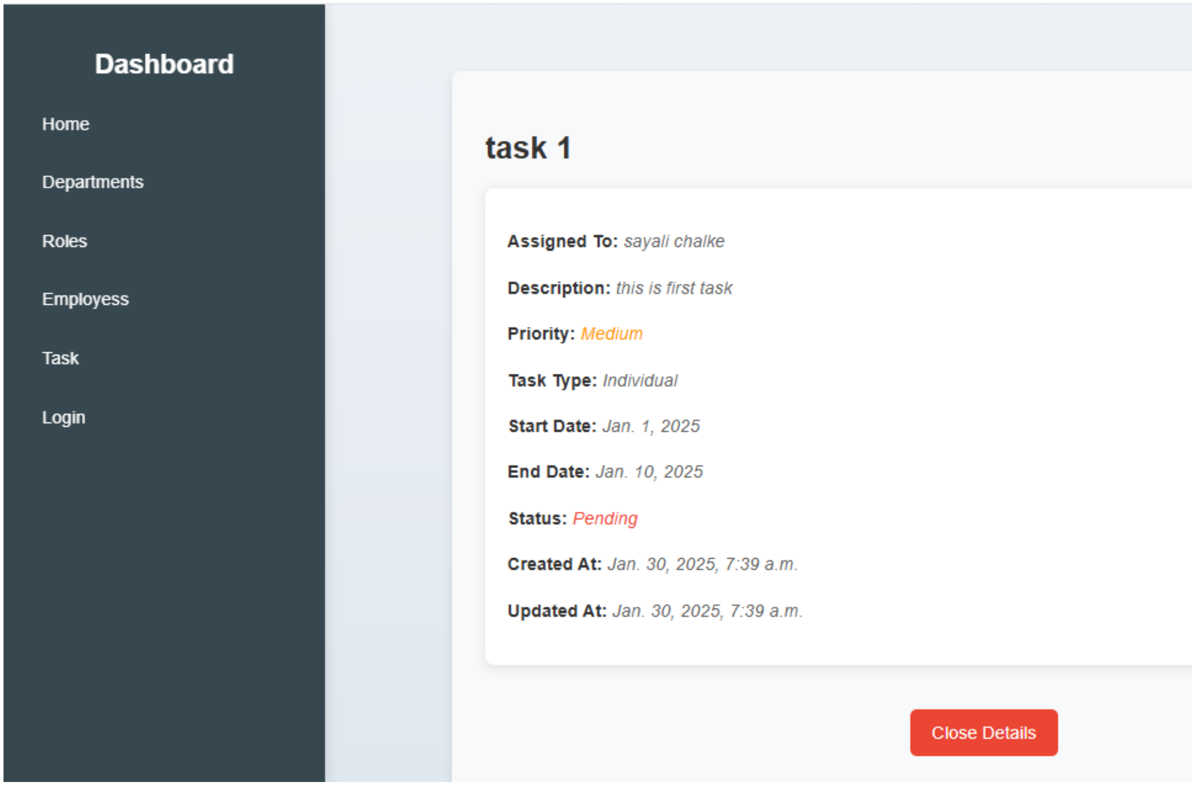


View Task Details

To view a task details:

1. Navigate to the 'See Details' page by clicking on **'See Details** in the task list.

The task detail displays the details of tasks.

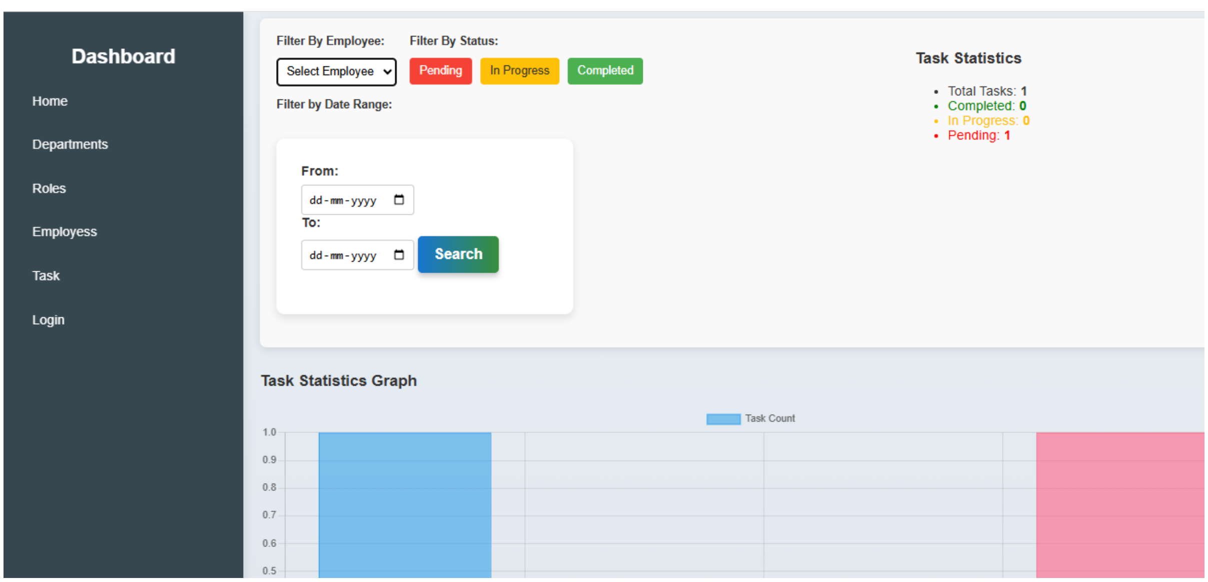


Filter Task

To filter a tasks:

1. Select filtration which you require from the filter options.

The task detail displays the details of tasks.



Features and Instructions of Performance Review:-

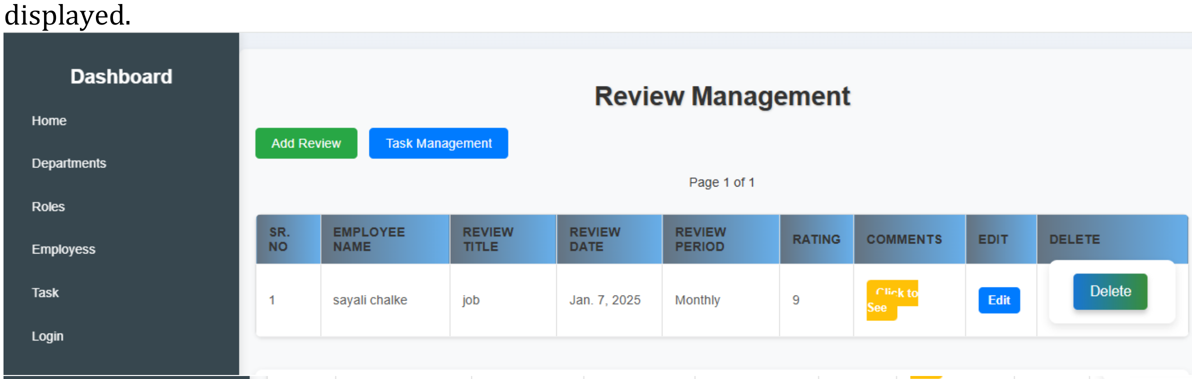
View Performance Review

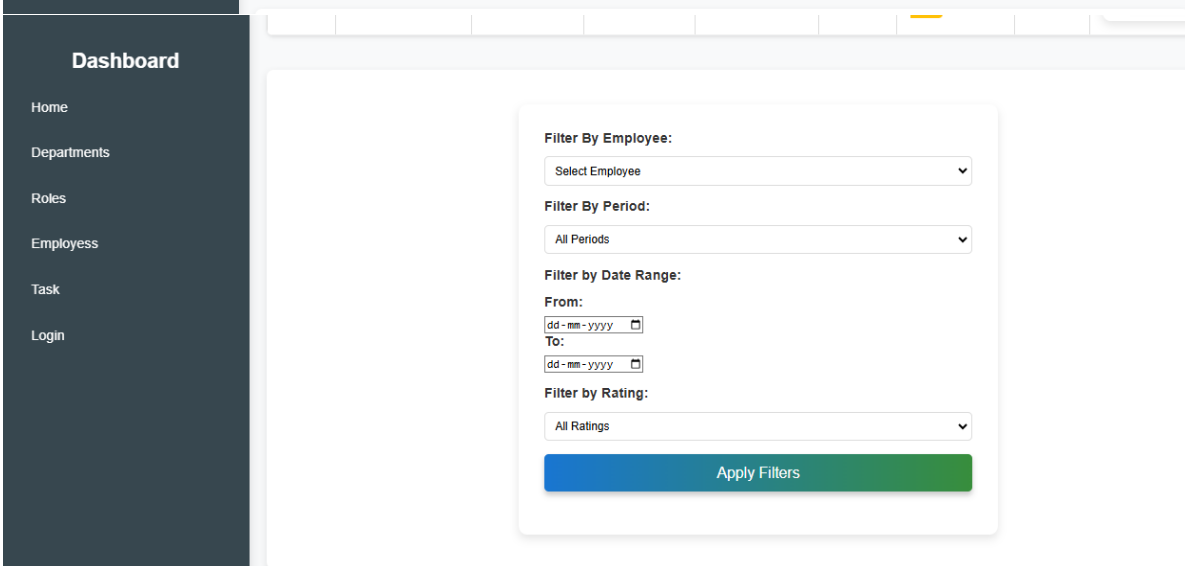
The performance review page displays a list of all active Performance Review in a tabular format. To view Reviews:

1. Go to the review page (`https://sauinternship.pythonanywhere.com/reviews/`).
2. The table will display the following details:

- Review ID
- Employee Name
- Review Title - Review Date
- Review Period
- Rating
- Comments
- Edit
- Delete

3. Options to Read comments, Edit or Delete Review, Filter and Statistics are also displayed.





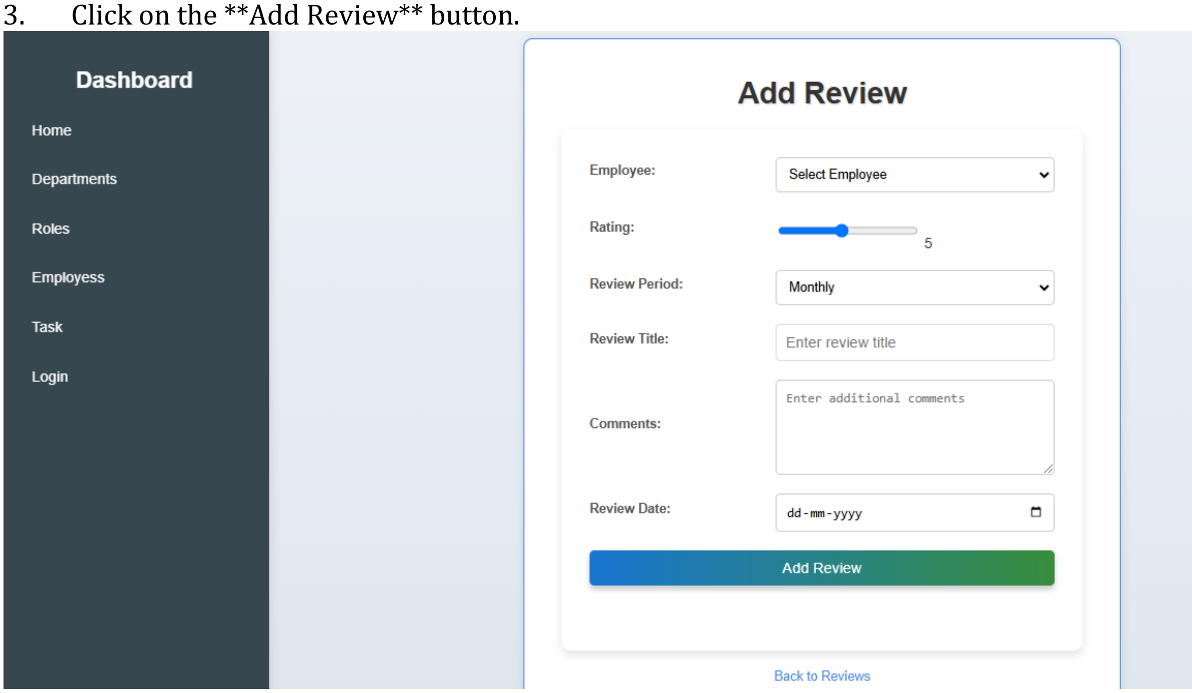
Add a New Review

To create a new
review:

1. Navigate to the ‘Add Review’ page by clicking on **'Add Review’ ** on top on performance review page.
2. Fill in the form fields:

- **Employee Name**: Select Employee Name
- **Rating**: Enter the performance rating of employee
- **Review Period**: Monthly, Quarterly or Annually
- **Review Title**: Enter review title
- **Comments**
- **Review Date**

3. Click on the **Add Review** button.



Update a Review

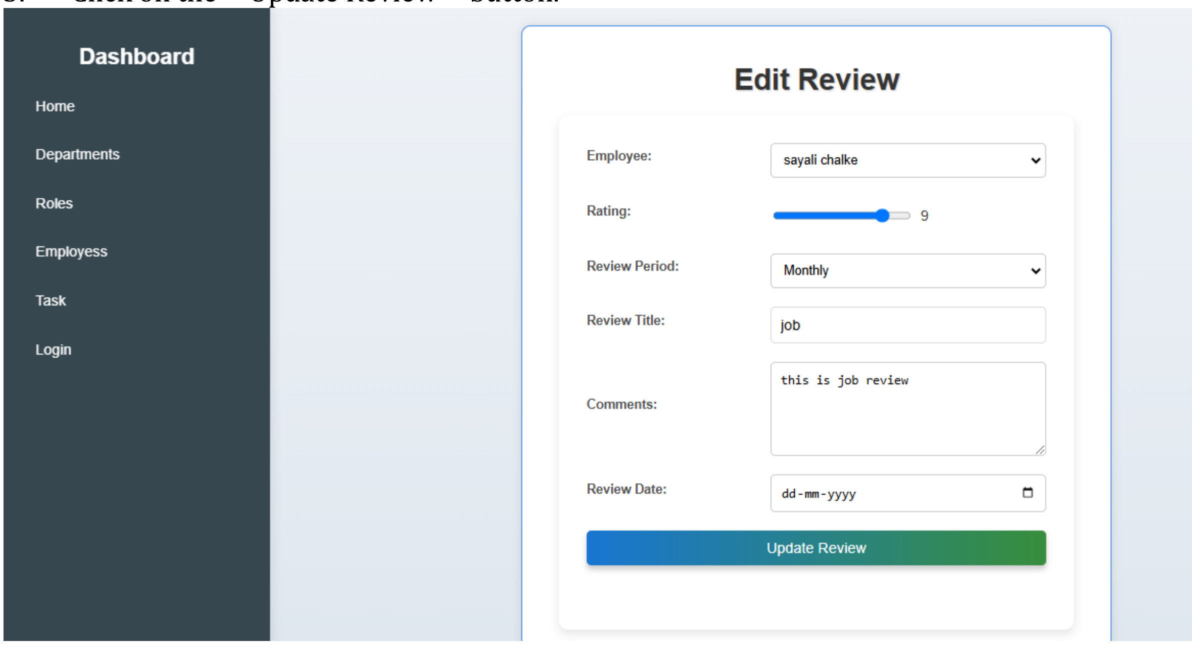
To update a review:

1. Navigate to the ‘Update Review’ page by clicking on **'Edit’ ** on performance review page.
2. Fill in the form fields:

- **Employee Name**: Select Employee Name
- **Rating**: Enter the performance rating of employee

- **Review Period**: Monthly, Quarterly or Annually
- **Review Title**: Enter review title
- **Comments**
- **Review Date**

3. Click on the **Update Review** button.

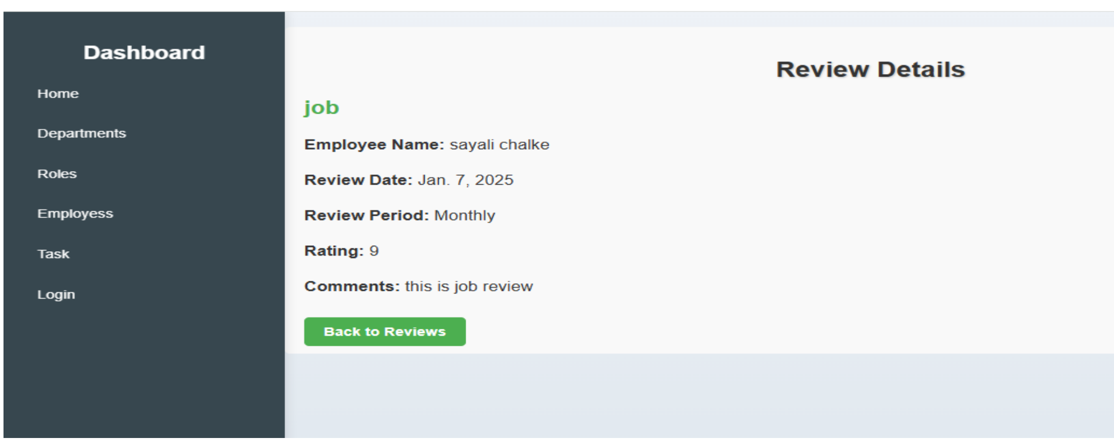


Read Comment

To read comments:

1. Navigate to the 'Comments' page by clicking on **'Read** in the Review List.

The comments displays the details of comments.

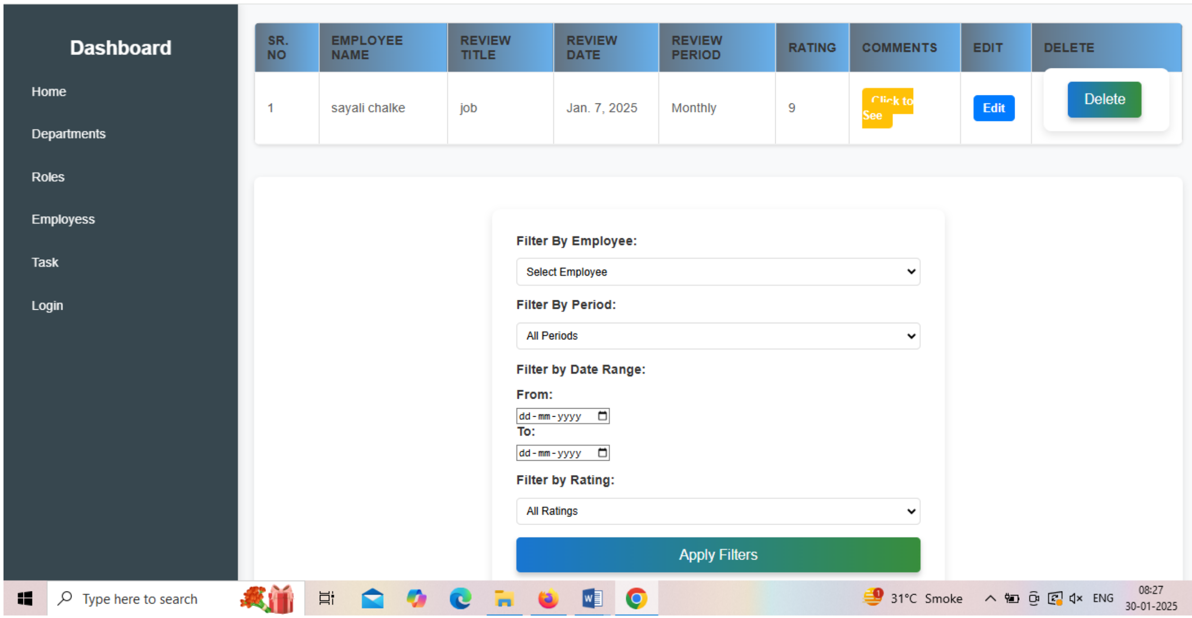


Filter Reviews

To filter a reviews:

1. Select filtration which you require from the filter options.

The review list displays the details of review.



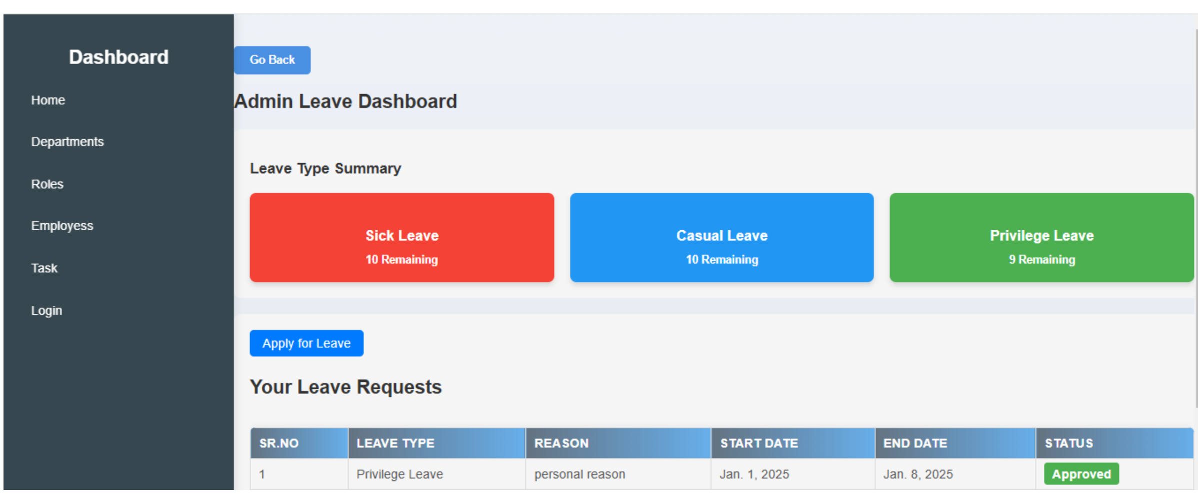
Features and Instructions of Leave Management:-

View Leave Management of Admin

The Admin leave management page displays a list of all active employee leaves in a tabular format. To view leaves:

1. Go to the Admin leave dashboard page

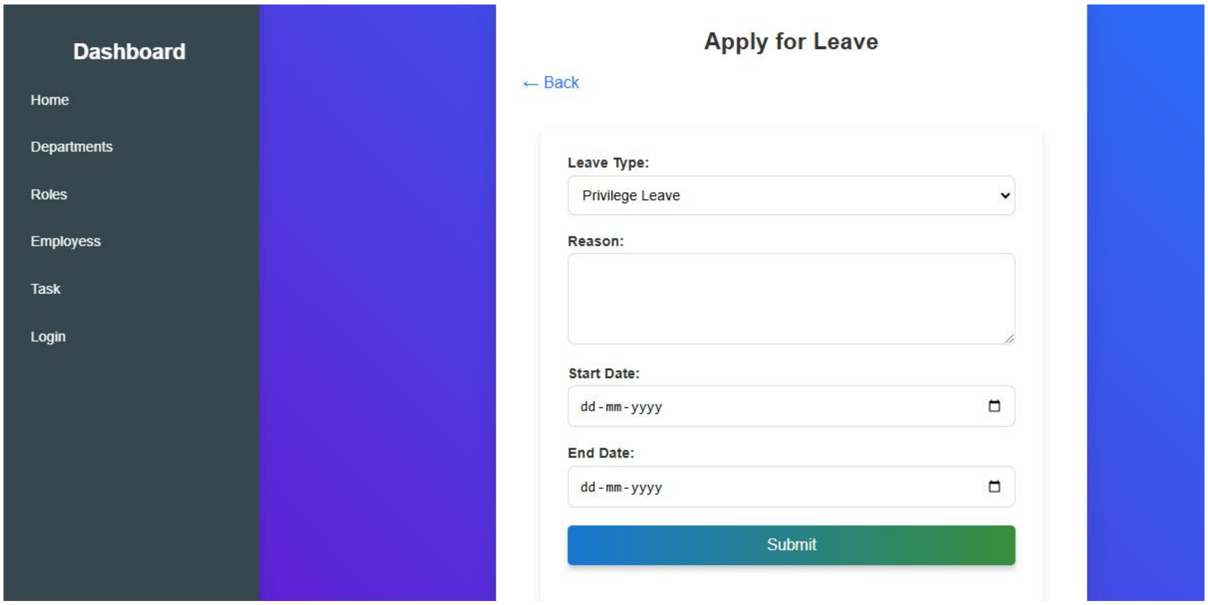
(`https://sauinternship.pythonanywhere.com/leave_dashboard_admin/ `).



Apply for Leave

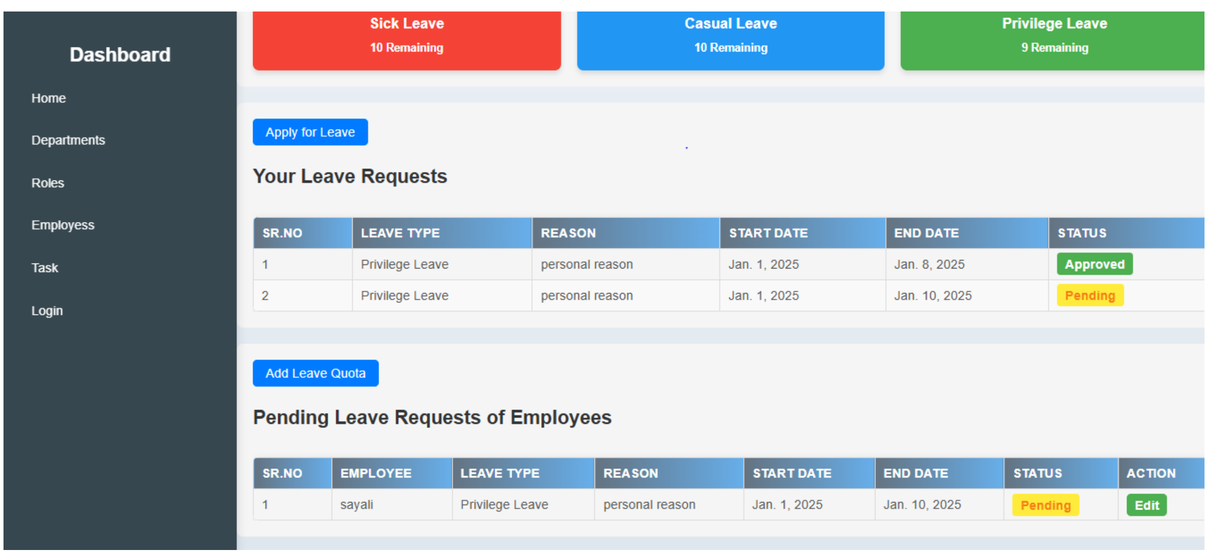
To apply for leave:

1. Navigate to the 'Apply Leave' page by clicking on **'Submit' ** on top on Your Leave Request Table.



View Applied Leaves of Employee

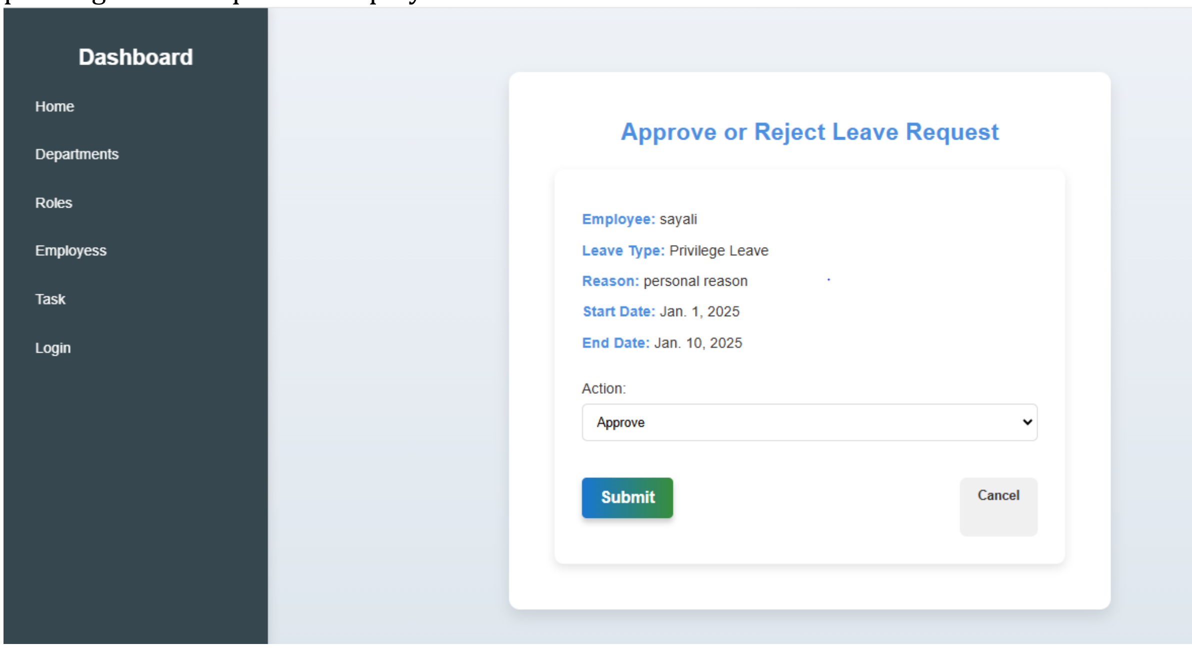
To view applied leaves of employee



Approve or Reject Leave Request of Employees

To create a new review:

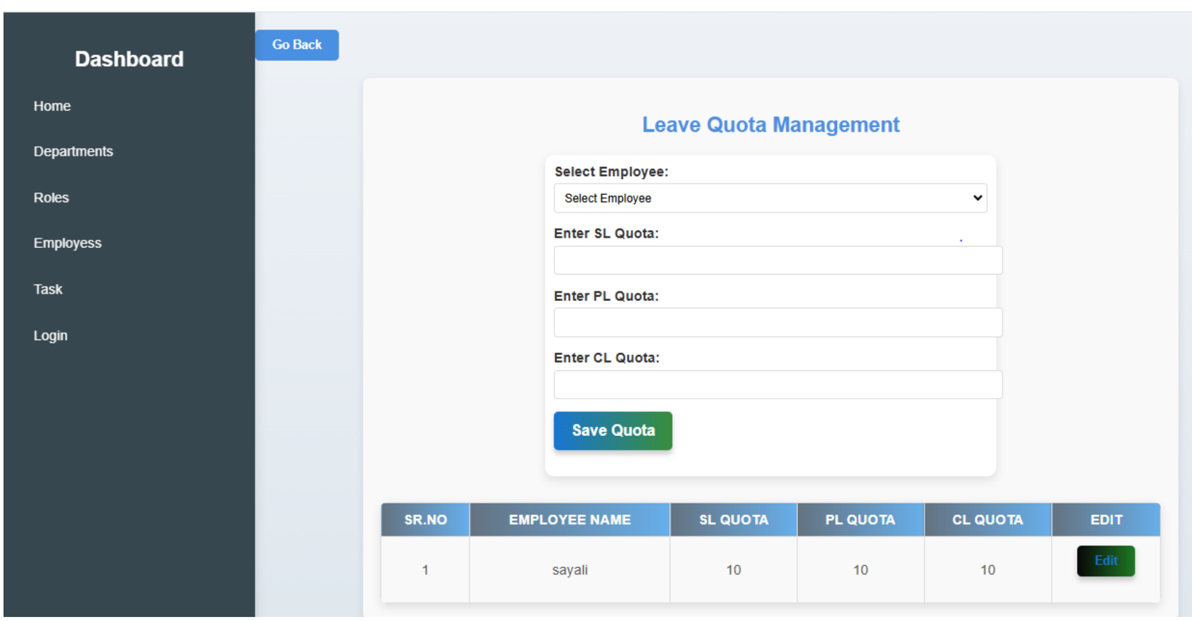
1. Navigate to the 'Approve or reject request' page by clicking on **'edit' ** on the list of pending leaves request of employees.



Allot Leave Quota to Employees

To allot leave quota to employee:

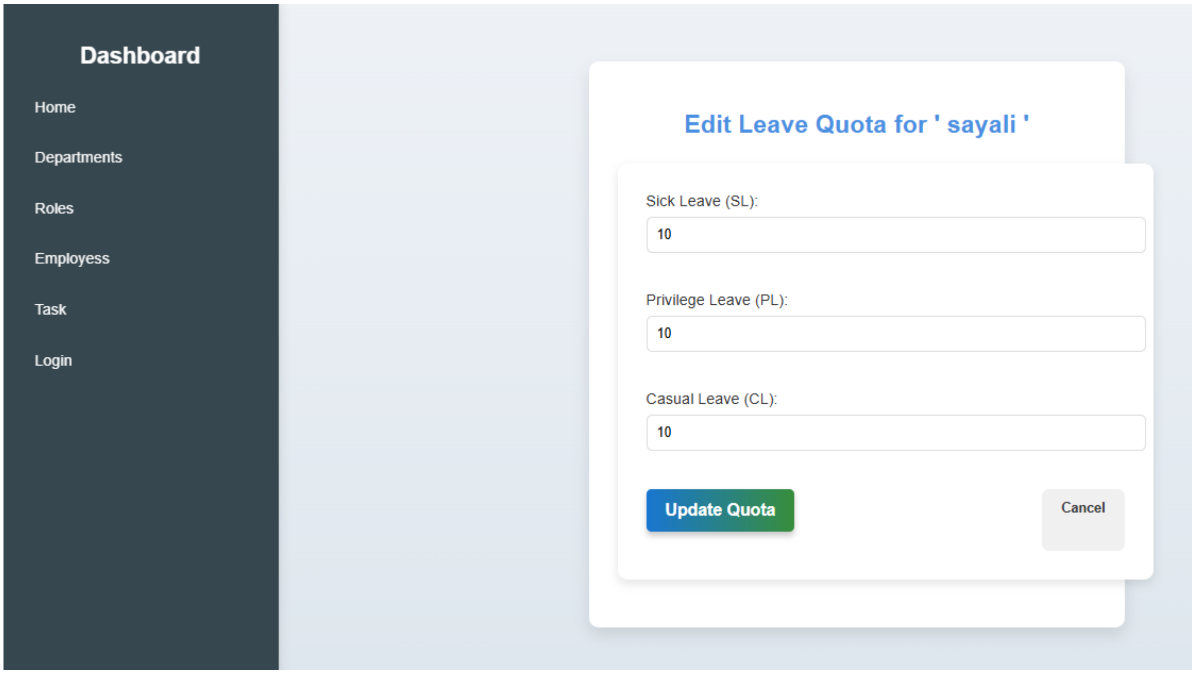
1. Navigate to the 'Add Leave Quota' page by clicking on **'Add Leave Quota' ** on top of the list of pending leave request of employee.



Edit Leave Quota to Employees

To edit leave quota to employee:

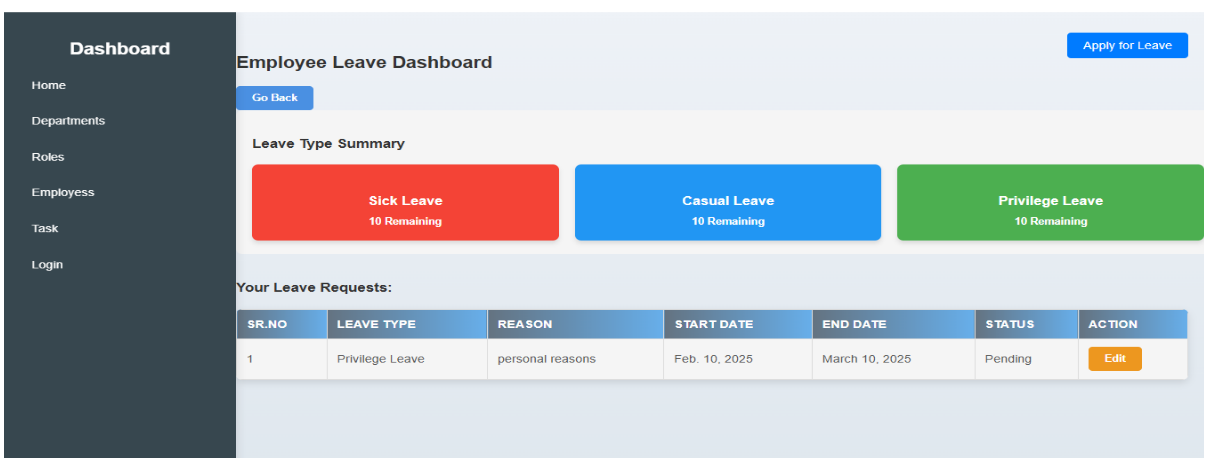
1. Navigate to the ‘Edit Leave Quota’ page by clicking on **'Edit’ ** button in the list.



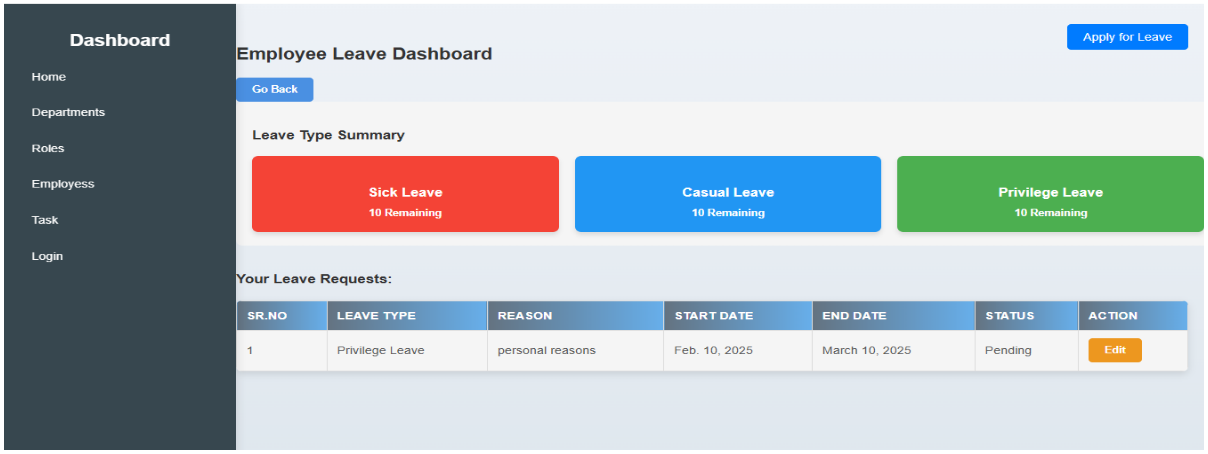
View Leave Management of Employee

The Employee leave management page displays a list of all leaves in a tabular format. To view leaves:

1. Go to the Employee leave dashboard page (`https://sauinternship.pythonanywhere.com/leave_dashboard_employee/`).



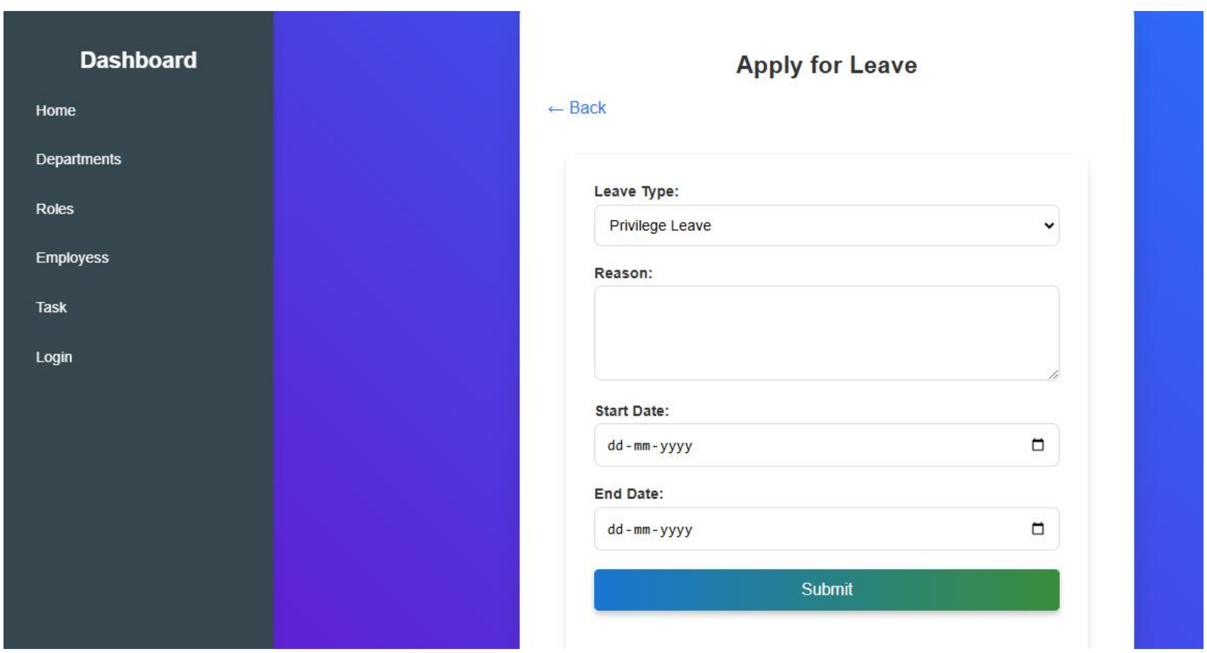
1. After Admin, HR or Manager approves or rejects the request the employee cannot edit that leave request anymore and after leave is approved employee leave quota of that type of leave is subtracted from leave type summary.



Apply for Leave

To apply for leave:

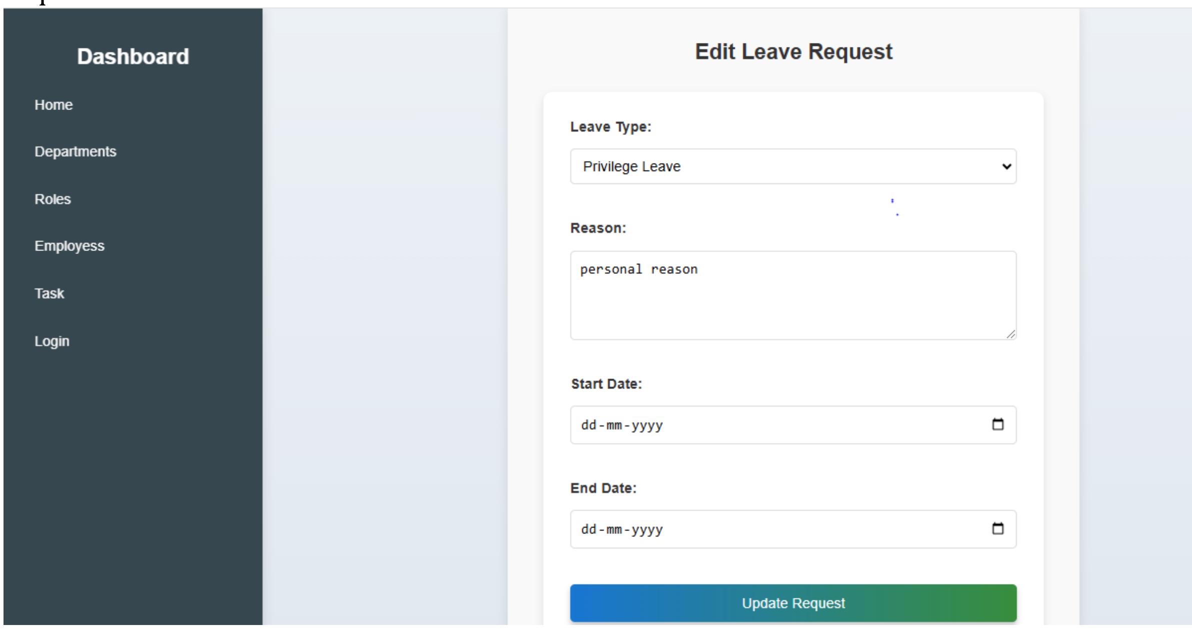
1. Navigate to the 'Apply Leave' page by clicking on **'Submit' ** on top on Your Leave Request Table.



Edit for Leave

To edit for leave:

1. Navigate to the ‘Edit Leave’ page by clicking on **'Update Request’ ** in the list of your list request.



Technical Details

- The system uses Django for backend processing.
- Templates are designed using HTML and CSS.
- Data is stored in the database and managed using Django ORM.