

## End User Documentation for Department and Role Management System

### 1. Overview

The Department and Role Management System is a Django-based web application designed to help users manage departmental and role-related information efficiently. The system allows users to:

- View a list of active departments and roles.
- Add a new department or role.
- Edit an existing department's or role's details.
- Delete (soft delete) a department or role.

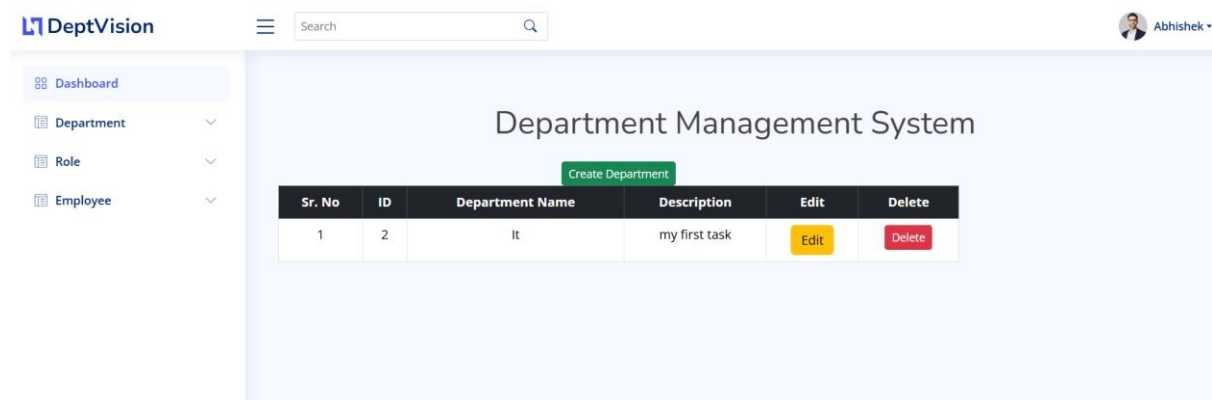
This document provides detailed instructions on how to use the system effectively.

### 2. Accessing the System

The system can be hosted locally or on a server. To access it, follow these steps:

1. Open a web browser (Chrome, Firefox, Edge, etc.).
2. Enter the following URL in the address bar:
  - <https://abhishekn27.pythonanywhere.com/> (for live server)
  - <http://127.0.0.1:8000/> (for local server)

This will open the homepage of the Department and Role Management System.



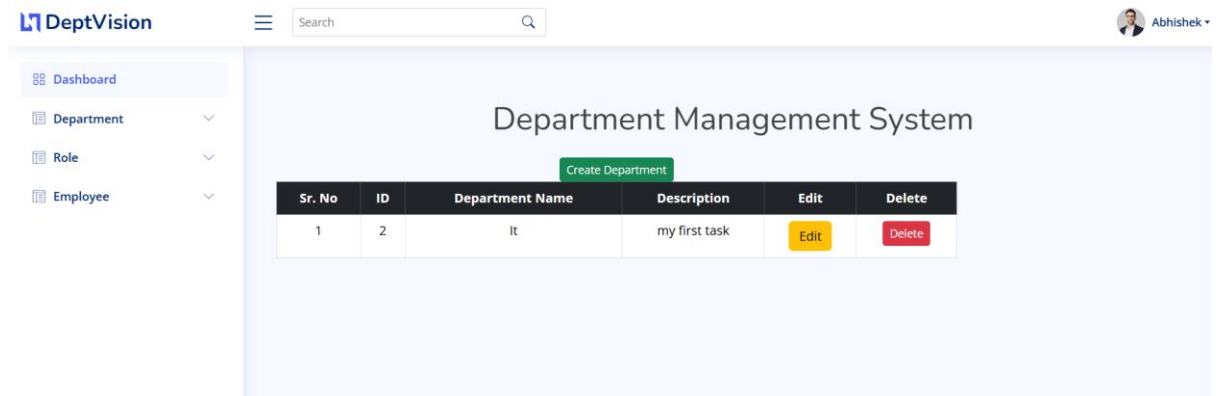
### 3. Features and Instructions for Departments

#### 3.1 View Departments

The homepage displays a list of all active departments in a tabular format. To view departments:

- Go to the homepage (<https://abhishekn27.pythonanywhere.com/> (for live server)
1. <http://127.0.0.1:8000/>.
  2. The table will display the following details:
    - Department ID
    - Department Name

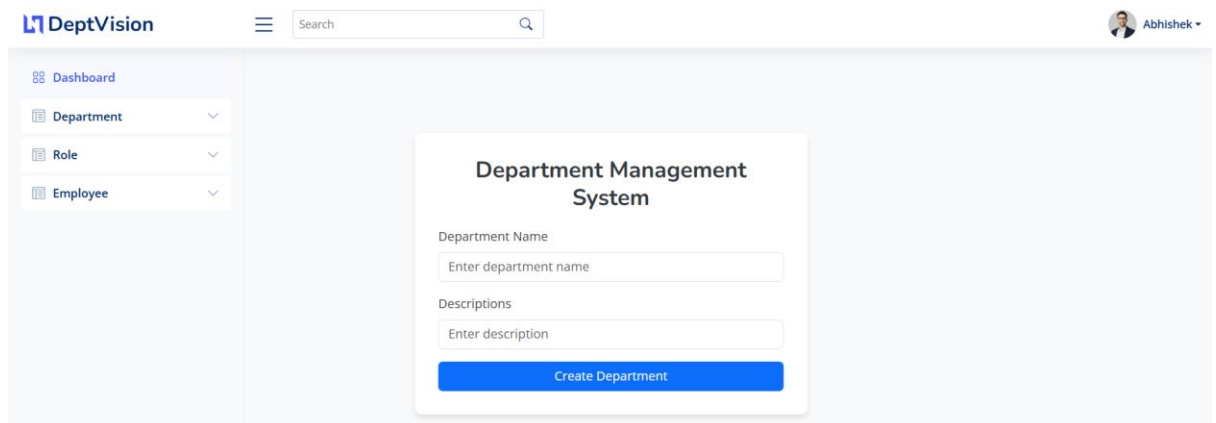
- Description
3. Options to Edit or Delete a department are also displayed.



### 3.2 Add a New Department

To create a new department:

1. Navigate to the '**Create Department**' page by clicking on '**Create Department**' in the sidebar.
2. Fill in the form fields:
  - **Department Name:** Enter the name of the department.
  - **Department Description:** Enter a short description.
3. Click on the **Create** button.
4. The new department will now appear in the list.



### 3.3 Edit/Update a Department

To update a department's details:

1. On the homepage, locate the department you want to update.
2. Click on the **Edit** button in the corresponding row.
3. Modify the fields in the form:
  - **Department Name**

- **Department Description**

4. Click on the **Update** button to save the changes.
5. The updated details will be reflected in the list.

The screenshot shows the 'DeptVision' application interface. On the left is a sidebar with a menu containing 'Dashboard', 'Department', 'Role', and 'Employee'. The main content area is titled 'Department Management System' and features a 'Create Department' link. Below this is a form for editing a department. The 'Department Name' field contains 'It' and the 'Descriptions' field contains 'my first task'. An 'Edit' button is at the bottom of the form.

### 3.4 Delete a Department

To delete (soft delete) a department:

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

The screenshot shows the 'DeptVision' application interface. On the left is a sidebar with a menu containing 'Dashboard', 'Department', 'Role', and 'Employee'. The main content area is titled 'Department Management System' and displays a table of departments. The table has columns for 'Sr. No', 'Department Name', 'Description', 'Edit', and 'Delete'. There is one row with '1' in the 'Sr. No' column, 'It' in the 'Department Name' column, and 'my first task' in the 'Description' column. The 'Edit' button is yellow and labeled 'Update', and the 'Delete' button is red and labeled 'Delete'.

Sr. No	Department Name	Description	Edit	Delete
1	It	my first task	<button>Update</button>	<button>Delete</button>

## 4. Features and Instructions for Roles

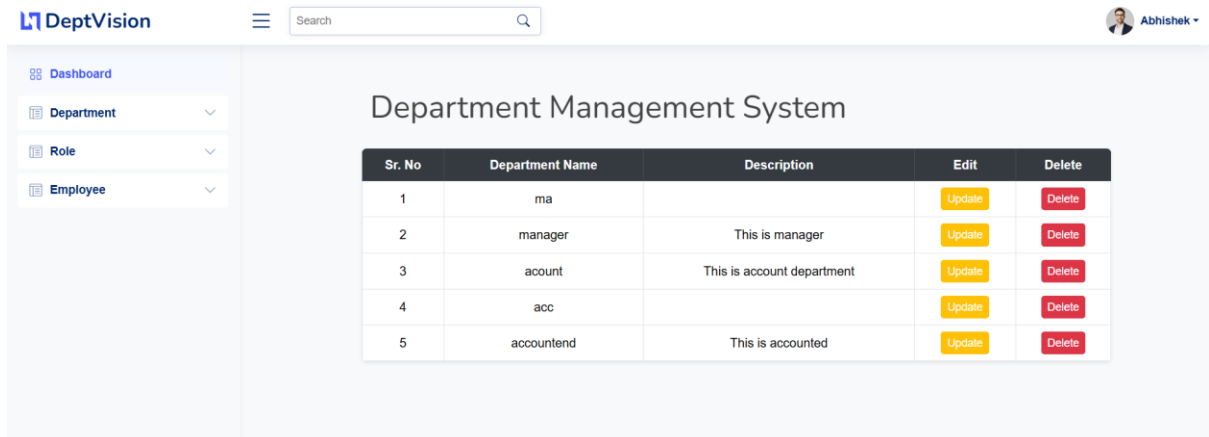
### 4.1 View Roles

The homepage displays a list of all active roles in a tabular format. To view roles:

1. Go to the homepage (<https://abhishekn27.pythonanywhere.com/> (for live server)
2. <http://127.0.0.1:8000/>).
3. The table will display the following details:
  - Role ID

- Role Name
- Description

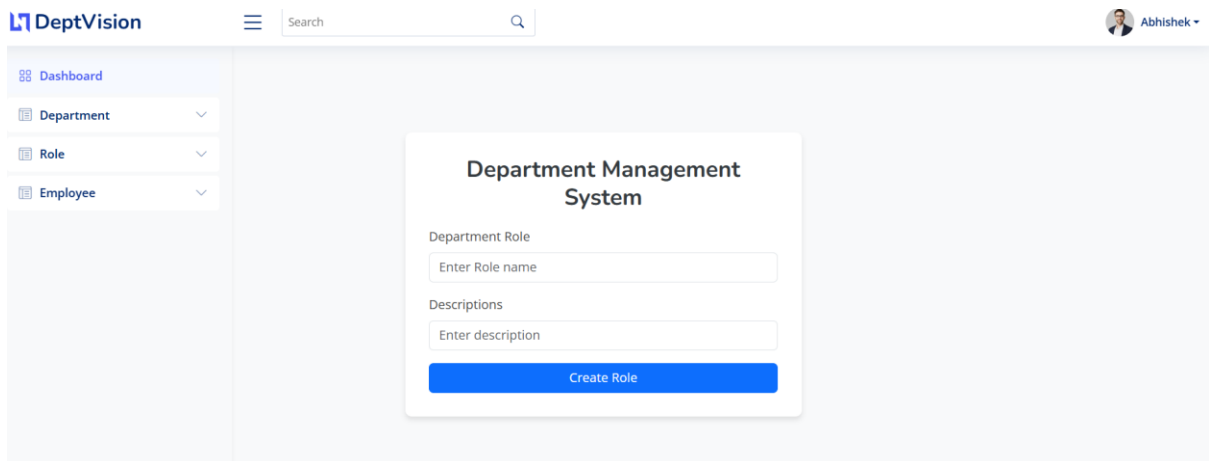
4. Options to Edit or Delete a role are also displayed.



## 4.2 Add a New Role

To create a new role:

1. Navigate to the '**Create Role**' page by clicking on '**Create Role**' in the sidebar.
2. Fill in the form fields:
  - **Role Name:** Enter the name of the role.
  - **Role Description:** Enter a short description.
3. Click on the **Create** button.
4. The new role will now appear in the list.

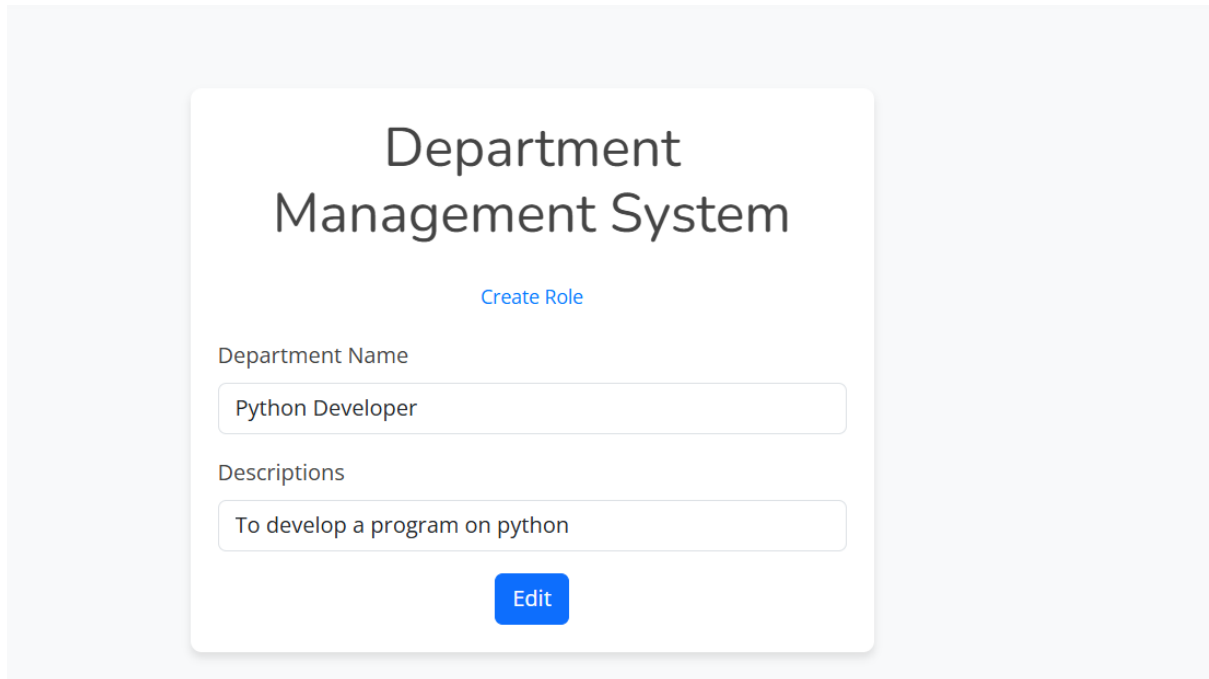


## 4.3 Edit/Update a Role

To update a role's details:

1. On the homepage, locate the role you want to update.
2. Click on the **Edit** button in the corresponding row.

3. Modify the fields in the form:
  - **Role Name**
  - **Role Description**
4. Click on the **Update** button to save the changes.
5. The updated details will be reflected in the list.

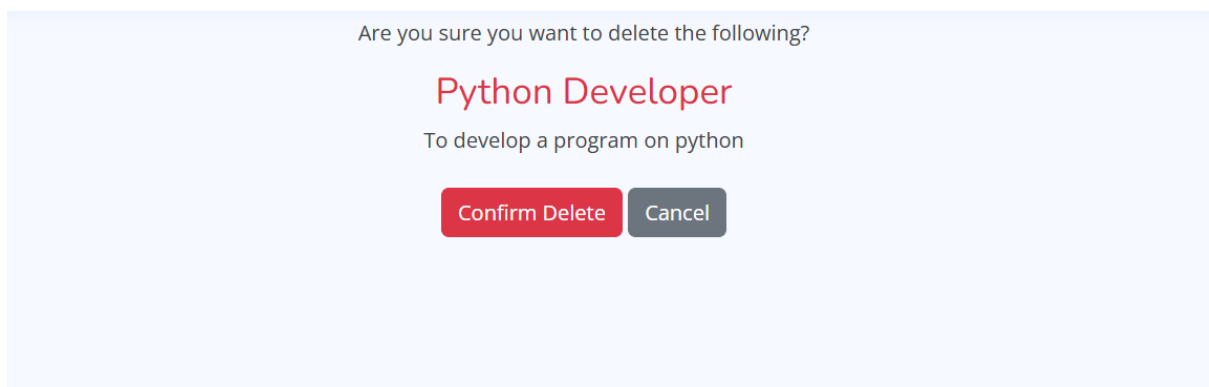


The screenshot shows a web form titled "Department Management System". Below the title is a link "Create Role". The form has two input fields: "Department Name" with the value "Python Developer" and "Descriptions" with the value "To develop a program on python". At the bottom of the form is a blue "Edit" button.

#### 4.4 Delete a Role

To delete (soft delete) a role:

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



The screenshot shows a confirmation dialog with the text "Are you sure you want to delete the following?". Below this text, the role name "Python Developer" is displayed in red, followed by its description "To develop a program on python". At the bottom of the dialog are two buttons: "Confirm Delete" (red) and "Cancel" (grey).

#### 5. Error Handling

- If an operation cannot be completed (e.g., due to missing data), the system will display an error message.
- Ensure that all required fields are filled before submitting forms.

### 5.1 View Employees

The homepage displays a list of all active employees in a tabular format. To view employees:

Go to the homepage (<https://abhishekn27.pythonanywhere.com/> (for live server)

<http://127.0.0.1:8000/>). Local server

1. 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**
2. Options to **Edit** or **Delete** an employee are also displayed.

### 5.2 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 First Name:** Enter the first name of the employee.
  - **Employee Last Name:** Enter the last name of the employee.
  - **Employee Email:** Enter the email of the employee.
  - **Employee Mobile Number:** Enter the mobile number of the employee.
  - **Employee Role:** Select the role of the employee.
  - **Employee Department:** Select the department the employee belongs to.

- **Employee Reporting Manager:** Select the reporting manager (optional).
  - **Employee Date of Joining:** Enter the employee's date of joining.
  - **Employee Username:** Choose a unique username.
  - **Employee Password:** Choose a secure password.
3. Click on the **Save** button.

**Create Employee**

First Name <input type="text" value="Enter first name"/>	Last Name <input type="text" value="Enter last name"/>
Username <input type="text" value="Enter username"/>	Password <input type="text" value="Enter password"/>
Email <input type="text" value="Enter email"/>	Mobile <input type="text" value="Enter mobile number"/>
Department <input type="text" value="Select a department"/>	Role <input type="text" value="Select a role"/>
Reporting Manager <input type="text" value="None"/>	Date of Joining <input type="text" value="dd-mm-yyyy"/>

4. The new employee will now appear in the list.

### 5.3 Edit/Update an Employee

To update an 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 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 **save** button to save the changes.

## Update Employee

First Name	Last Name
<input type="text" value="charu"/>	<input type="text" value="palvi"/>
Email	Mobile
<input type="text" value="nishadabhishek200027@gmail.coi"/>	<input type="text" value="7208665472"/>
Department	Role
<input type="text" value="Hr"/>	<input type="text" value="Hr"/>
Reporting Manager	Date of Joining
<input type="text" value="Abhishek Nishad"/>	<input type="text" value="10-05-2023"/>

5. The updated details will be reflected in the list.

### 5.4 Delete an Employee

To delete an 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.

## Delete Employee

Are you sure you want to delete **charu palvi**?



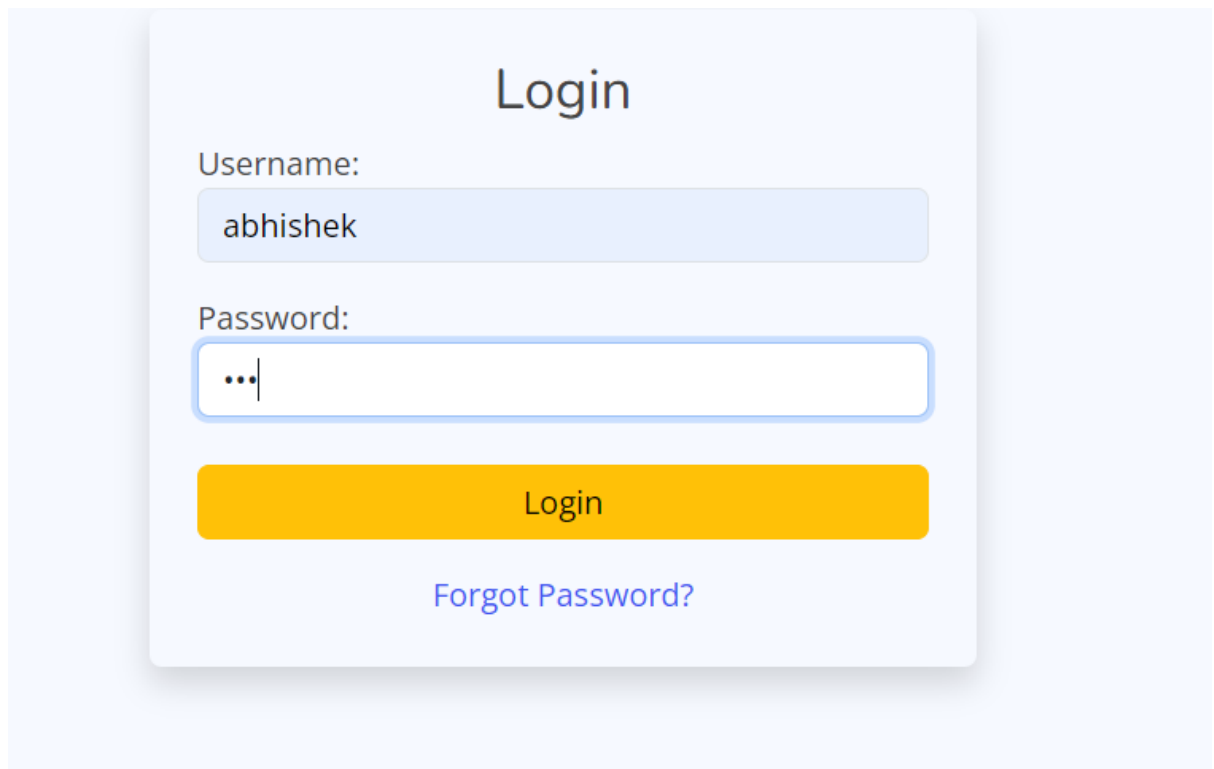
## 6. Features and Instructions of Login/Password Reset

### 6.1 Login User

The login displays a login form. To view the login form:

Go to the homepage (<https://abhishekn27.pythonanywhere.com/> (for live server)

<http://127.0.0.1:8000/>). Local server

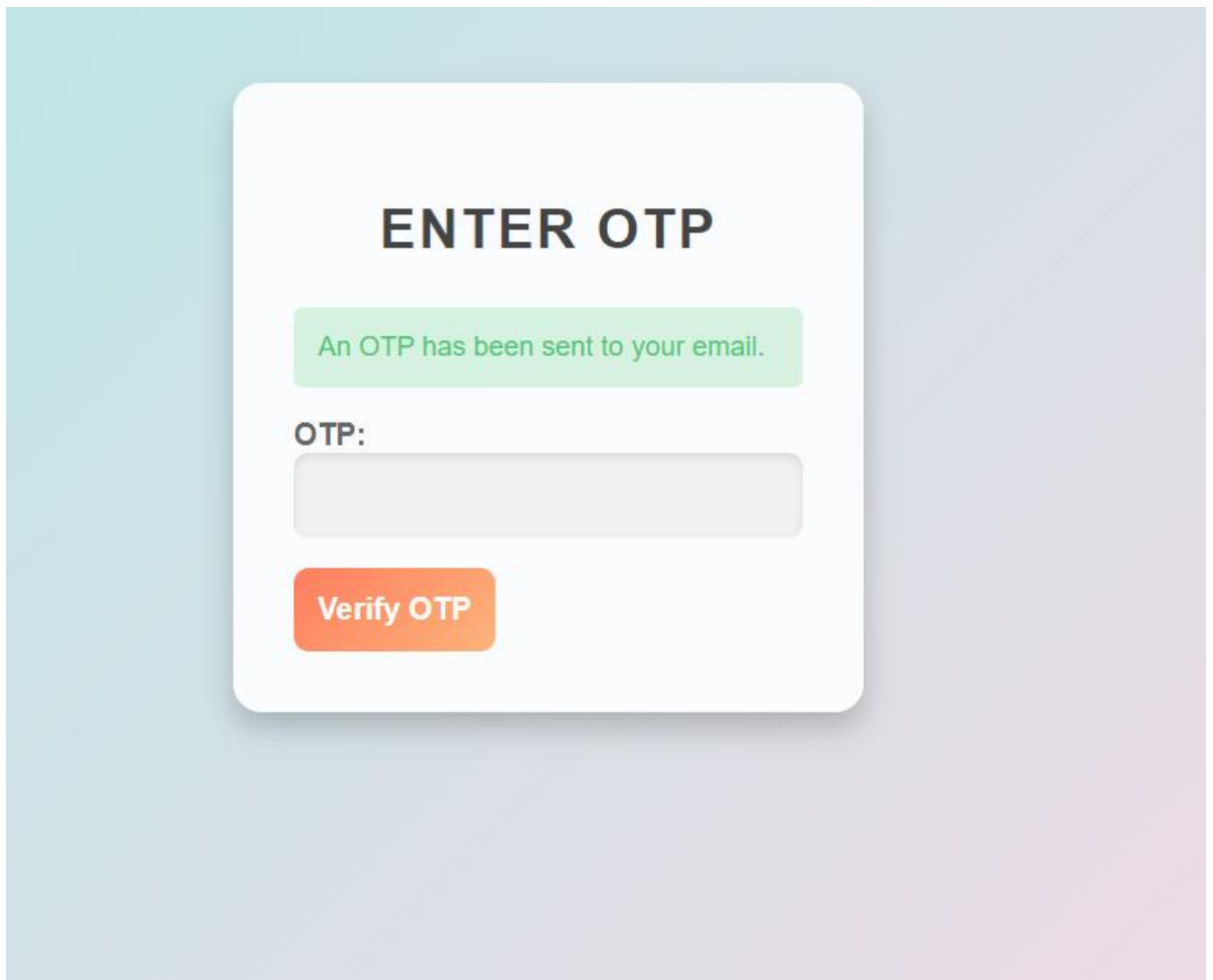
A screenshot of a web application's login page. The page has a light blue background. In the center, there is a white card with a light blue border. At the top of the card, the word "Login" is written in a large, dark blue font. Below it, the label "Username:" is followed by a light blue input field containing the text "abhishek". Below that, the label "Password:" is followed by a white input field with a light blue border, containing three dots "..." indicating a password. Below the password field is a large, solid yellow button with the word "Login" in black text. At the bottom of the card, the text "Forgot Password?" is written in a smaller, blue font.

### 6.2 Reset Password Request

The Reset Password Request displays an email confirmation form to send OTP to that email. To view the reset password form:

Go to the homepage (<https://abhishekn27.pythonanywhere.com/> (for live server)

<http://127.0.0.1:8000/>). Local server



### 6.3 Validate OTP Request

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

Go to the homepage (<https://abhishekn27.pythonanywhere.com/> (for live server)  
<http://127.0.0.1:8000/>). Local server

### 6.4 Set New Password

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

1. Go to the homepage:

(<https://abhishekn27.pythonanywhere.com/> (for live server)  
<http://127.0.0.1:8000/>). Local server

## Reset Password

New Password:

Confirm Password:

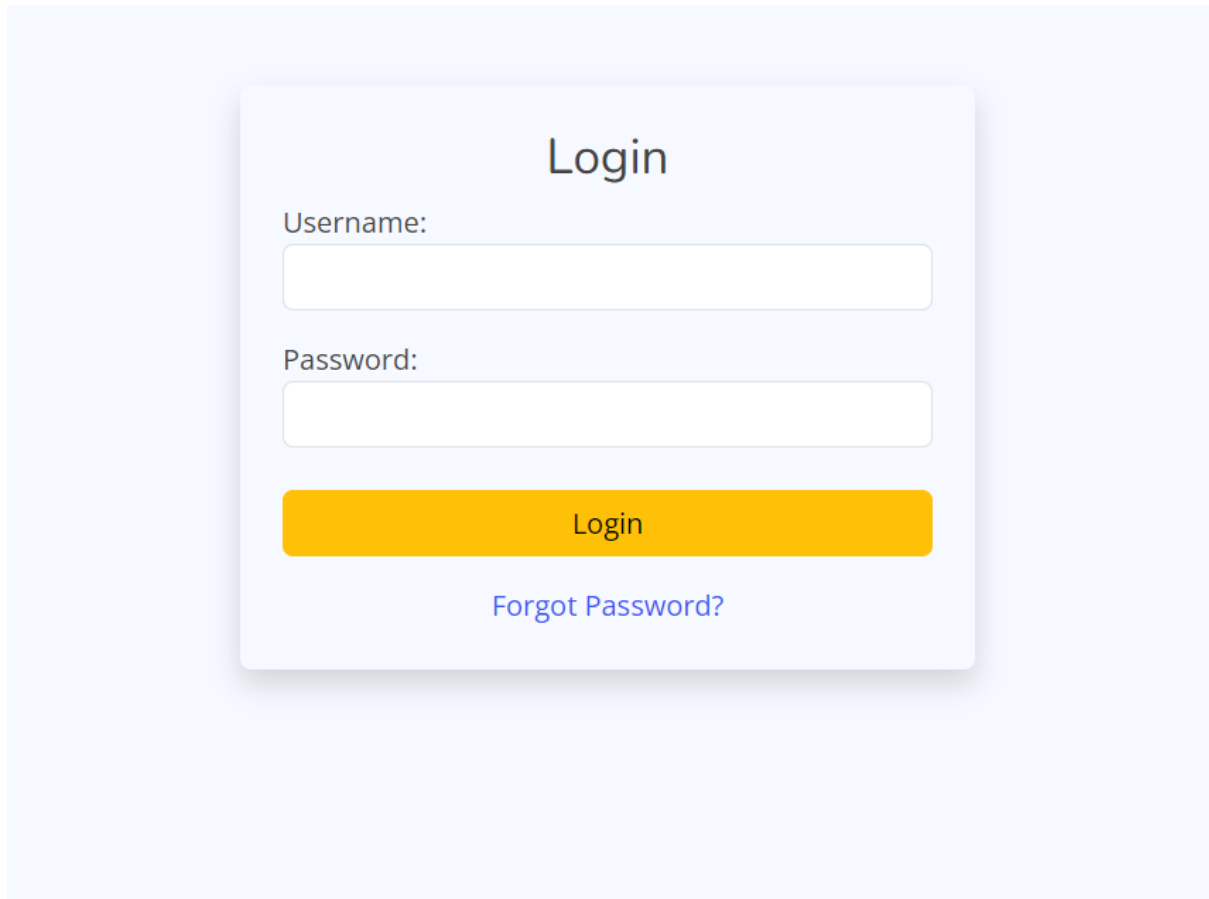
## 6.5 Login Page with Password Reset Message

The login displays a login form. To view the login form:

1. Go to the homepage:

(<https://abhishekn27.pythonanywhere.com/>) (for live server)

<http://127.0.0.1:8000/>). Local server



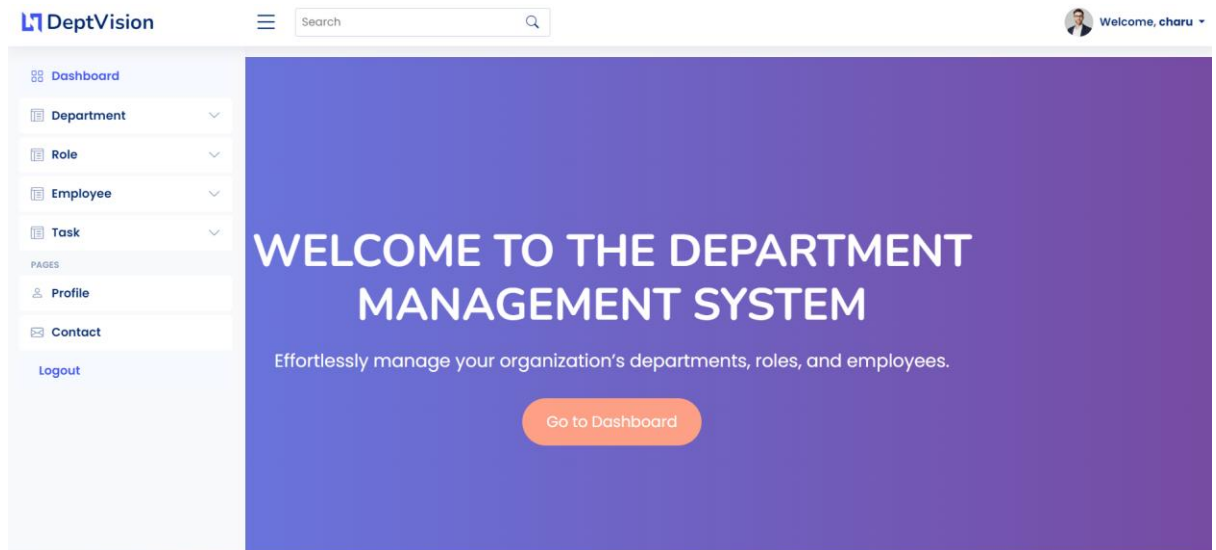
## 6.6 Home Page After Login Success

The home page displays the username and role. To view the home page:

1. Go to the homepage:

(<https://abhishekn27.pythonanywhere.com/>) (for live server)

<http://127.0.0.1:8000/>). Local server



## 6. View Tasks

The homepage displays a list of tasks assigned to the reporting manager. To view tasks:

1. Navigate to the homepage:
  - Live Server: <https://abhishekn27.pythonanywhere.com/dashboard/tasks>
  - Local Server: <http://127.0.0.1:8000/dashboard/tasks>
2. The table will display the following details:
  - **Task Title**
  - **Description**
  - **Priority**
  - **Task Type**
  - **Assigned To (Employee)**
  - **Start Date**
  - **End Date**
  - **Status**
3. You can filter tasks by:
  - **Employee** (e.g., assigned employee)
  - **Status** (Pending, In Progress, Completed)
  - **Date Range** (Start Date and End Date)
4. **Pagination:** The tasks are displayed with 10 tasks per page.
5. Task statistics are shown:

- Total Completed Tasks
- Total In Progress Tasks
- Total Pending Tasks

## Task Management

Create Task

Leave Management

Performance Review

Page 1 of 1

Sr. No	Employee Name	Task Title	Start Date	End Date	See Details	Status	Action	Edit	Delete
1	charu palvi	task1	Feb. 10, 2024	May 10, 2024	<a href="#">See Details</a>	Completed	Completed	<a href="#">Edit</a>	<a href="#">Delete</a>
2	Atul Nishad	task5	Jan. 11, 2025	Jan. 20, 2025	<a href="#">See Details</a>	In Progress	Mark Completed	<a href="#">Edit</a>	<a href="#">Delete</a>

Filter By Employee:

Select Employee

Filter By Status:

Pending

In Progress

Completed

Filter by Date Range:

From: dd-mm-yyyy

To: dd-mm-yyyy

Search

### Task Statistics

- Total Tasks: 2
- Completed: 1
- In Progress: 1
- Pending: 0

### Task Statistics Graph

Status	Count
Completed	1
In Progress	1
Pending	0

6. Options to view task details, edit, delete, or mark a task as completed are available.

## 6.2. Add a Task

To create a new task:

1. Navigate to the '**Create Task**' page from the sidebar or menu.
2. Fill in the form fields:
  - **Title:** Enter the task title.
  - **Description:** Provide a detailed description of the task.
  - **Priority:** Set the task priority (e.g., High, Medium, Low).
  - **Task Type:** Select the type of task (e.g., Bug, Feature, Improvement).
  - **Start Date:** Enter the start date for the task.
  - **End Date:** Enter the deadline for the task.
  - **Assigned To:** Select the employee to whom the task is assigned.
3. Click '**Add Task**' to add the task.

## Add Task

Task Title:	<input type="text" value="Task6"/>
Description:	<div>Discriptions of task</div>
Priority:	<div>Medium</div>
Task Type:	<div>Individual</div>
Start Date:	<div>10-02-2023</div>
End Date:	<div>10-04-2023</div>
Assign To:	<div>Atul Nishad</div>

Add Task

- The new task will now appear in the task list.

### 3. Edit/Update a Task

To update an existing task:

- Locate the task you want to edit on the homepage.
- Click the '**Edit**' button for the task.
- Modify the fields in the form:
  - Title**
  - Description**
  - Priority**
  - Task Type**
  - Start Date**

- **End Date**
- **Status** (Pending, In Progress, Completed)

4. Click '**Update Task**' to update the task.

## Edit Task

Task Title:

Description:

Discriptions of task

Priority:

Medium

Task Type:

Individual

Start Date:

dd-mm-yyyy

End Date:

dd-mm-yyyy

Status:

Pending

Assign To:

Atul Nishad

Update Task

5. The updated details will reflect in the task list.

#### 4. Delete a Task

To delete a task:

1. Locate the task you want to delete on the homepage.
2. Click the '**Delete**' button for the task.
3. The task will be permanently removed and will no longer appear in the list.

Python comp

127.0.0.1:8000 says  
Are you sure you want to delete this task?

OKCancel

Welcome, abhishek ▾

## Task Management

Create Task

Leave Management

Performance Review

Page 1 of 1

Sr. No	Employee Name	Task Title	Start Date	End Date	See Details	Status	Action	Edit	Delete
1	charu palvi	task1	Feb. 10, 2024	May 10, 2024	<a href="#">See Details</a>	Completed	Completed	<a href="#">Edit</a>	<a href="#">Delete</a>
2	Atul Nishad	task5	Jan. 11, 2025	Jan. 20, 2025	<a href="#">See Details</a>	In Progress	Mark Completed	<a href="#">Edit</a>	<a href="#">Delete</a>
3	Atul Nishad	Task6	Feb. 10, 2023	April 10, 2023	<a href="#">See Details</a>	Pending	Mark Completed	<a href="#">Edit</a>	<a href="#">Delete</a>

Filter By Employee:

Select Employee ▾

Filter By Status:

Pending

In Progress

Completed

Filter by Date Range:

From:

To:

Search

### Task Statistics

- Total Tasks: 3
- Completed: 1
- In Progress: 1
- Pending: 1

## 5. Mark a Task as Completed

To mark a task as completed:

1. Locate the task on the homepage.
2. Click the '**Mark as Completed**' button.
3. The task's status will be updated to '**Completed**'.

Sr. No	Employee Name	Task Title	Start Date	End Date	See Details	Status	Action	Edit	Delete
1	charu palvi	task1	Feb. 10, 2024	May 10, 2024	<a href="#">See Details</a>	Completed	Completed	<a href="#">Edit</a>	<a href="#">Delete</a>
2	Atul Nishad	task5	Jan. 11, 2025	Jan. 20, 2025	<a href="#">See Details</a>	In Progress	Mark Completed	<a href="#">Edit</a>	<a href="#">Delete</a>
3	Atul Nishad	Task6	Feb. 10, 2023	April 10, 2023	<a href="#">See Details</a>	Pending	Mark Completed	<a href="#">Edit</a>	<a href="#">Delete</a>

## 6. View Task Details

To view detailed information about a task:

1. Locate the task on the homepage.
2. Click the '**Details**' button for the task.
3. You will be redirected to a page displaying:
  - Task Title
  - Description
  - Priority



- Task Type
- Assigned Employee
- Start Date
- End Date
- Status

## Task6

**Assigned To:** Atul Nishad

**Description:** Discriptions of task

**Priority:** Medium

**Task Type:** Individual

**Start Date:** Feb. 10, 2023

**End Date:** April 10, 2023

**Status:** Pending

**Created At:** Jan. 11, 2025, 11:13 a.m.

**Updated At:** Jan. 11, 2025, 11:13 a.m.

Close Details

## 7. Error Handling

If an error occurs while managing tasks:

- A friendly error message will be displayed.
- Check your input fields for correctness or try again later.

## 7. Troubleshooting

If you encounter issues, try the following steps:

- **Page Not Loading:** Ensure the server is running. Start it using the command:
  - python manage.py runserver for local server or check internet connection for live server.
- **Data Not Displayed:** Confirm that the database has the data you are looking for.
- **Form Errors:** Ensure all required fields are filled before submitting.

