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.

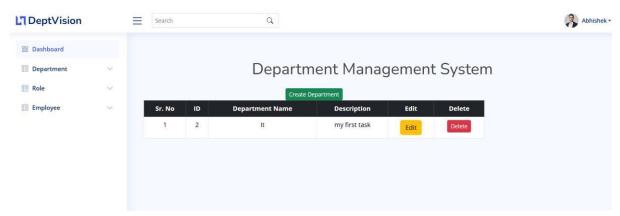
This document provides detailed instructions on how to use the system effectively.

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:

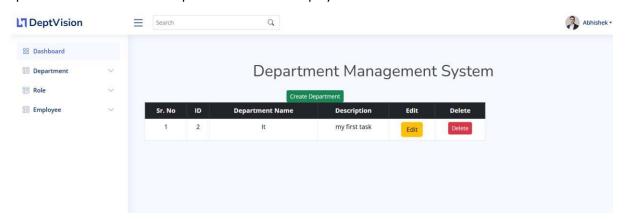
- o Go to the homepage (https://abhishekn27.pythonanywhere.com/ (for live server)
- 1. http://127.0.0.1:8000/).
- 2. The table will display the following details:

Department ID

Department Name

Description

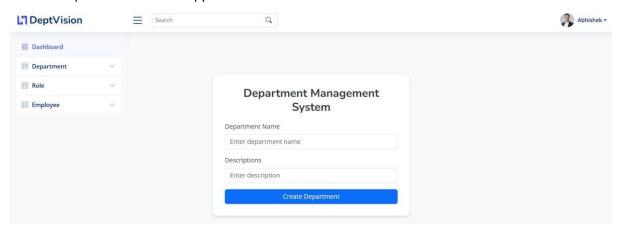
3. Options to Edit or Delete a department are also displayed.



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:
 - o **Department Name**: Enter the name of the department.
 - o **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

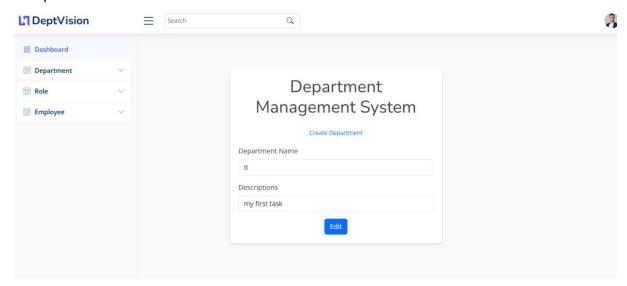
To update a department's details:

- 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

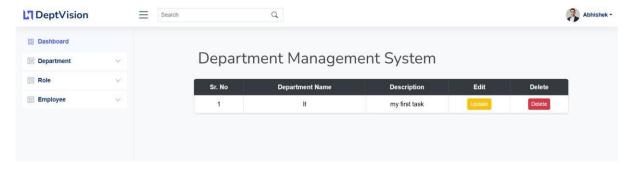
- 4. Click on the **Update** button to save the changes.
- 5. The updated details will be reflected in the list.



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.



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:

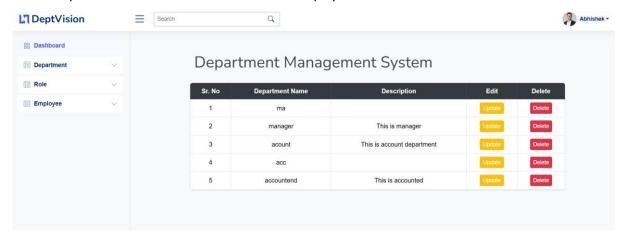
- 1. Go to the homepage (https://abhishekn27.pythonanywhere.com/ (for live server)
- 2. http://127.0.0.1:8000/).
- 3. The table will display the following details:

Role ID

Role Name o

Description

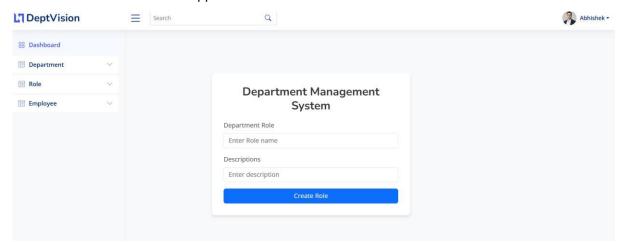
4. Options to Edit or Delete a role are also displayed.



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:
 - o Role Name: Enter the name of the role.
 - o 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

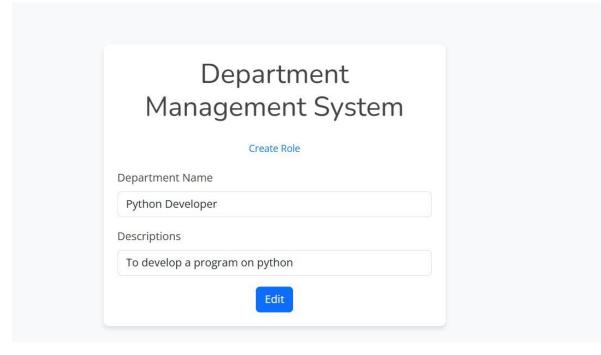
To update a role's details:

- 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:
 - o Role Name o

Role Description

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



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.



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 o First
    Name o Last Name o
    Email o Mobile
    Number o Role o
    Department o
    Reporting Manager o
    Date of Joining o
    Username
    Password
```

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

5.2 Add a New Employee

To create a new employee:

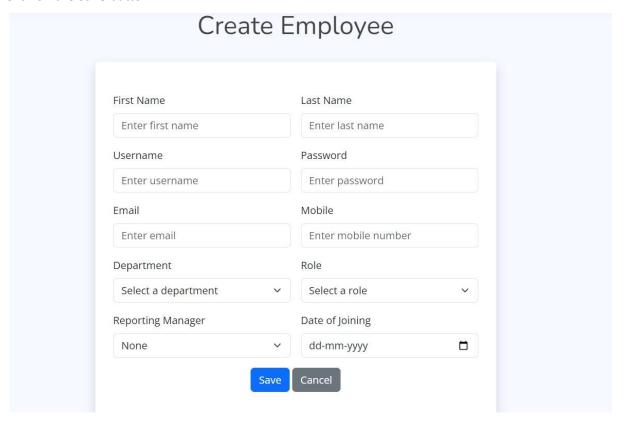
- 1. Navigate to the 'Add Employee' page by clicking on 'Create Employee' in the sidebar.
- 2. Fill in the form fields:
 - Employee First Name: Enter the first name of the employee.
 Enter the last name of the employee.
 - o **Employee Email**: Enter the email of the employee.
 - o **Employee Mobile 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.

- o **Employee Password**: Choose a secure password.
- 3. Click on the Save button.



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:
 - o Employee First Name o

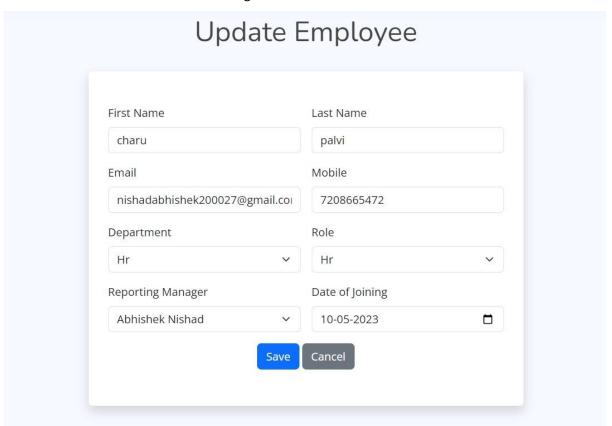
Employee Last Name o

Employee Email o

Employee Mobile Number

Employee Role

- Employee Department
 - **Employee Reporting Manager**
- Employee Date of Joining
- 4. Click on the **save** button to save the changes.



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.



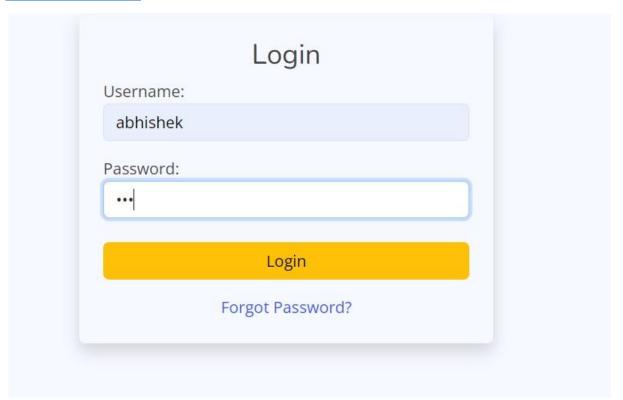
6. Features and Instructions of Login/Password Reset

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)

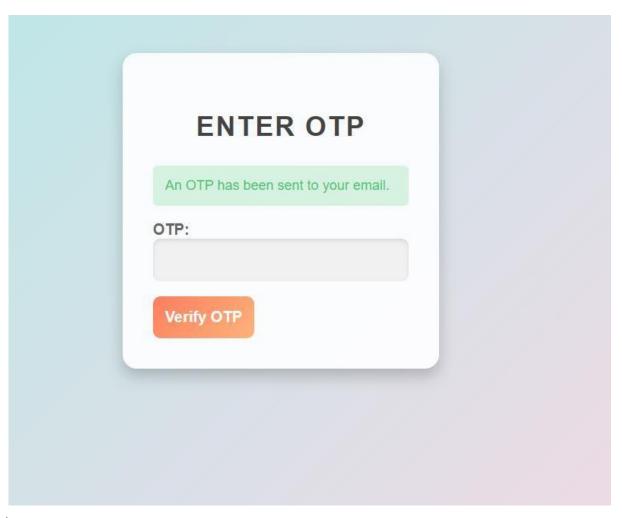
http://127.0.0.1:8000/). Local server



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

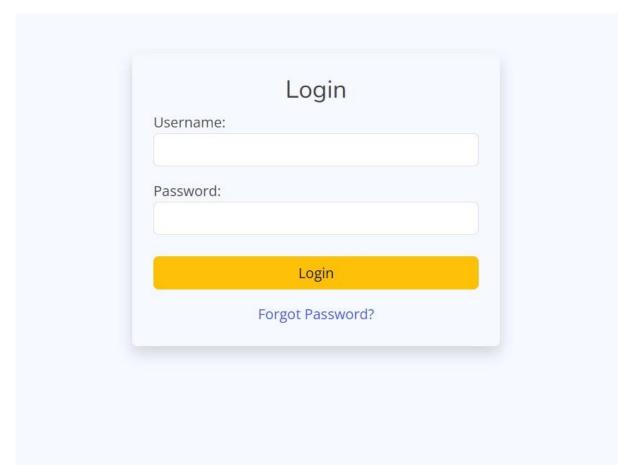
New Password:	•••••	
Confirm Passwo	ord: •••••	- 2
Reset Password		-

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

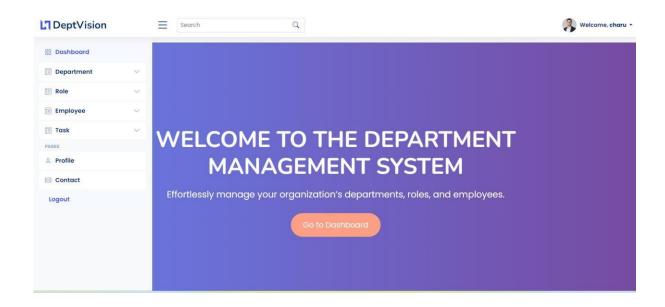


6.6 Home Page After Login Success

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:
 - o Live Server:

https://abhishekn27.pythonanywhere.com/dashboard/ta

sks o 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) \circ Start Date \circ End Date \circ 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

	ame Task Titl		ee Details Status	Action	Edit Delete
1 charu palvi	task1	Feb. 10, 2024 May 10, 2024	See Details Completed	Completed	Edit Delete
2 Atul Nishad	task5	Jan. 11, 2025 Jan. 20, 2025	See Details	Mark Completed	Edit Delete
Filter by Date Ranger From: dd-mm-yyy		dd-mm-yyyy 🗅 Search		ComplIn ProgPendir	gress: 1
Task Statist		Los			

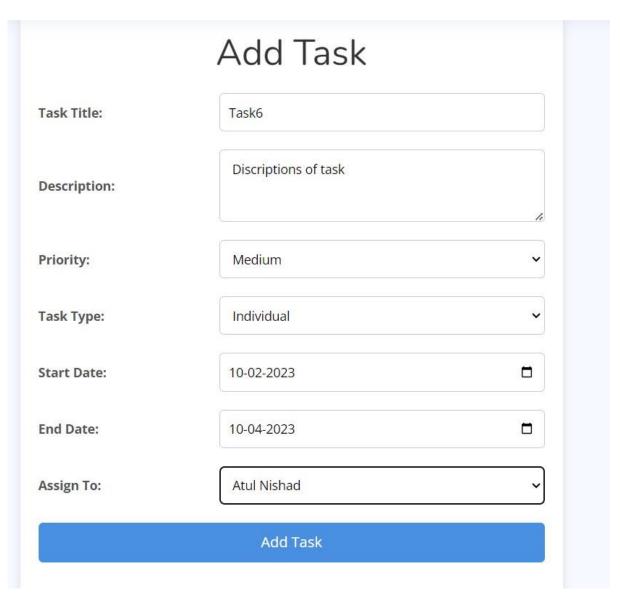
6. Options to view task details, edit, delete, or mark a task as completed are available. **6.2. Add a Task**

To create a new task:

- 1. Navigate to the 'Create Task' page from the sidebar or menu.
- 2. Fill in the form fields:
 - o **Title**: Enter the task title.
 - Description: Provide a detailed description of the task.
 Priority:
 Set the task priority (e.g., High, Medium, Low).
 - \circ $\,$ Task Type: Select the type of task (e.g., Bug, Feature, Improvement). \circ

Start Date: Enter the start date for the task. \circ **End Date**: Enter the deadline for the task.

- o **Assigned To**: Select the employee to whom the task is assigned.
- 3. Click ' Add Task' to add the task.



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

3. Edit/Update a Task

To update an existing task:

- 1. Locate the task you want to edit on the homepage.
- 2. Click the 'Edit' button for the task.
- 3. Modify the fields in the form:
 - $\circ \quad \text{Title} \circ$

Description

 \circ Priority \circ

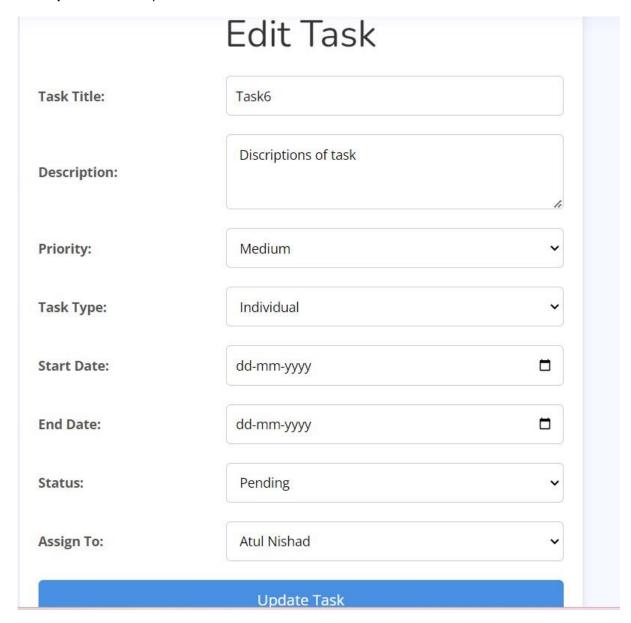
Task Type

Start Date

End Date

Status (Pending, In Progress, Completed) 4.

Click 'Update Task' to update the task.



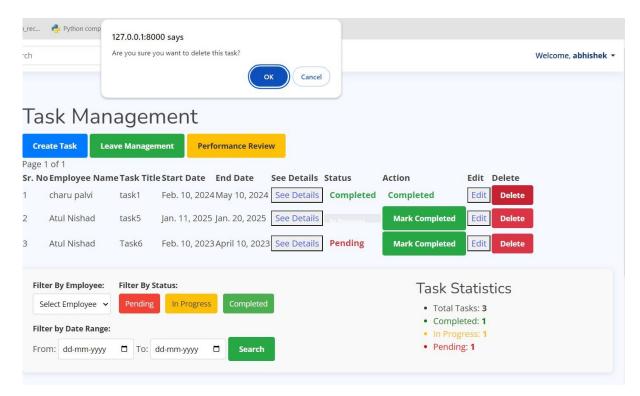
5. The updated details will reflect in the task list.

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.



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'.



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:
 - o Task Title o

Description

o Priority

Task Type

Assigned Employee

o Start Date o

End Date o

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.

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.

8 View Reviews

The homepage displays a list of all reviews in a paginated format. Reviews can be filtered and searched based on various criteria. To view reviews:

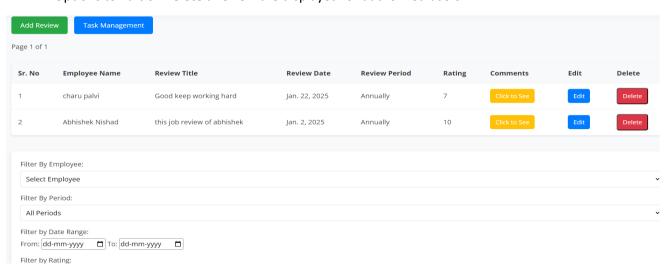
- 1. Navigate to the homepage:
 - o Live Server:

https://abhishekn27.pythonanywhere.com/dashboar

d/

o Local Server: http://127.0.0.1:8000/dashboard

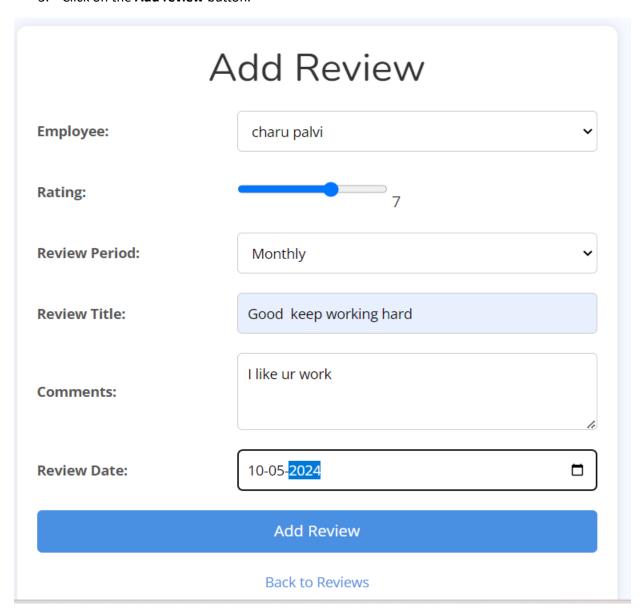
- 2. The table will display the following details:
 - Employee Name
 - Review Period (Monthly, Quarterly, Annually)
 - Review Title
 - Rating
 - Comments
 - Review Date
 - o Reviewer Name
- 3. Filters and Search Options:
 - o Filter by Department, Employee, Review Period, Date Range, or Rating.
 - Search for employees by their First Name or Last Name.
- 4. Options to **Edit** or **Delete** a review are displayed for authorized users.



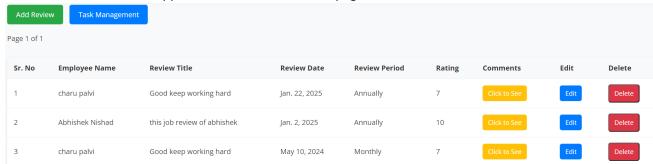
2. Add a New Review

To create a new review:

- 1. Navigate to the **Add Review** page by clicking on "Add Review" in the sidebar.
- 2. Fill in the form fields:
 - o **Employee**: Select the employee for whom the review is being created.
 - o Rating: Enter a rating (1-10).
 - o **Review Period**: Choose from Monthly, Quarterly, or Annually.
 - o **Review Title**: Provide a title for the review.
 - o **Comments**: Enter feedback or comments.
 - o **Review Date**: Specify the date of the review.
- 3. Click on the Add review button.



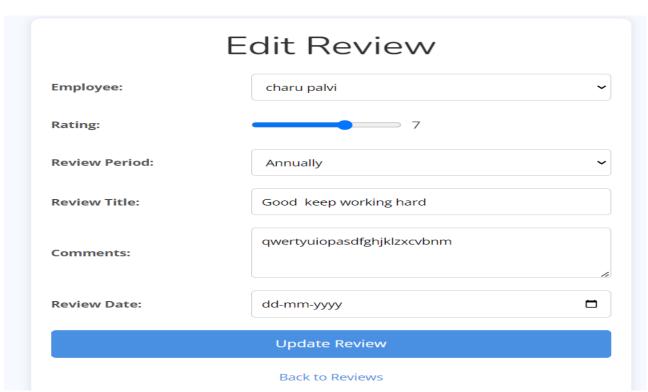
4. The new review will now appear in the list on the homepage.



3. Edit/Update a Review

To update an existing review:

- 1. On the homepage, locate the review you want to update.
- 2. Click on the **Edit** button in the corresponding row.
- 3. Modify the form fields:
 - Employee
 - Rating
 - Review Period
 - Review Title
 - Comments
 - Review Date



- 4. Click on the **Add Review** button to apply changes.
- 5. The updated review details will be reflected in the list.

4. View Comments

To see the detailed comments for a review:

- 1. On the homepage, locate the review whose comments you want to view.
- 2. Click on the View Comments button in the corresponding row.
- 3. The detailed comments will be displayed on a new page.

Review Details

Good keep working hard

Employee Name: charu palvi

Review Date: Jan. 22, 2025

Review Period: Annually

Rating: 7

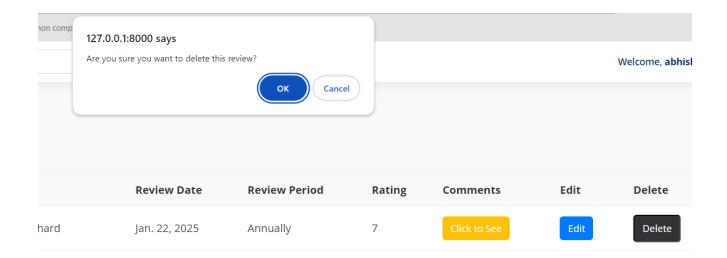
Comments: qwertyuiopasdfghjklzxcvbnm

Back to Reviews

5. Delete a Review

To delete a review:

- 1. On the homepage, locate the review you want to delete.
- 2. Click on the **Delete** button in the corresponding row.
- 3. The review will be removed from the list.



Leave Management System Documentation

Leave Dashboard

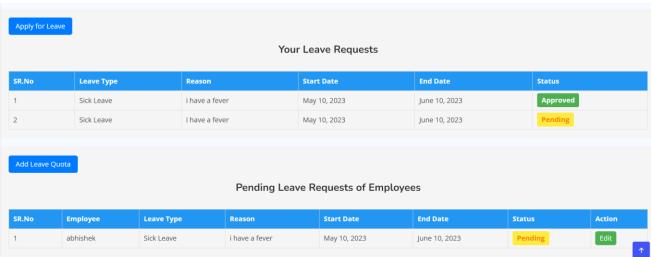
Accessing the Leave Dashboard

- URL:
 - Live Server: https://abhishekn27.pythonanywhere.com/
 - Local Server: http://127.0.0.1:8000/
- Steps:
- 1. Log in to the system with your credentials.
- 2. Based on your role:
 - Admin: Access the Admin Leave Dashboard, displaying pending leave requests, leave quotas, and summaries.
 - Employee: Access the Employee Leave Dashboard, showing your leave applications, pending requests, and leave quota.

Dashboard Features

- Admin View:
 - Pending leave requests for approval or rejection.
 - o Leave quotas of all employees.
 - o Leave type summary showing the count of each leave type.





• Employee View:

- List of your leave applications.
- Summary of remaining leave quotas:
 - Sick Leave
 - Casual Leave
 - Privilege Leave

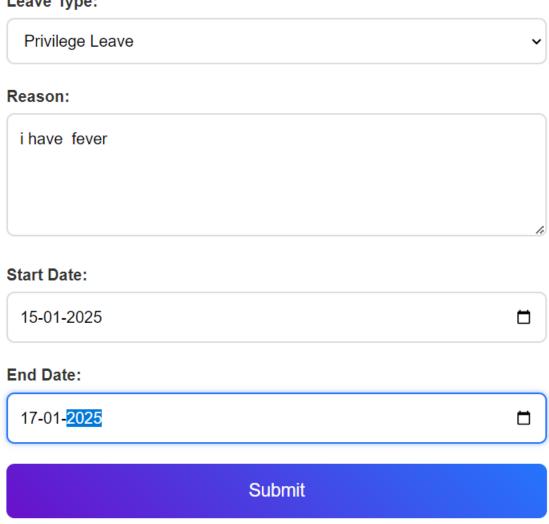
5.2 Apply for Leave

Steps to Apply for Leave

- 1. Navigate to the **Apply Leave** page.
- 2. Fill in the required details:
 - Leave Type: Select from available options based on your remaining quota.
 - o **Reason:** Provide a reason for the leave.
 - Start Date: Specify the start date.
 - End Date: Specify the end date.

Apply for Leave

Leave Type:



- 3. Click Submit.
 - o If the selected leave type exceeds your quota, an error will be displayed.
- 4. The leave application will be submitted for approval.
 - o Admin Role: Redirected to the Admin Leave Dashboard.
 - **Employee Role:** Redirected to the Employee Leave Dashboard.



Approve or Reject Leave Request

Employee: abhishek

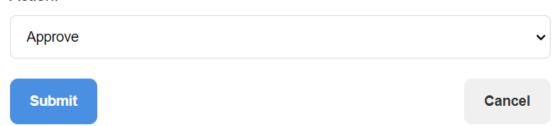
Leave Type: Sick Leave

Reason: i have a fever

Start Date: May 10, 2023

End Date: June 10, 2023

Action:



Steps to Edit a Leave Application

- 1. Go to the **Employee Leave Dashboard**.
- 2. Locate the leave request you want to edit.
- 3. Click on the **Edit** button.
- 4. Update the fields:
 - Leave Type
 - Reason
 - Start Date
 - End Date
- 5. Click **submit** to update the leave request.

5.4 Approve or Reject Leave (Admin/Manager)

Steps to Manage Leave Requests

- 1. Go to the Admin Leave Dashboard.
- 2. Locate the pending leave request.

3. Click on Approve/Reject.

SR.No	Leave Type	Reason	Start Date	End Date	Status
1	Sick Leave	i have a fever	May 10, 2023	June 10, 2023	Approved
2	Sick Leave	i have a fever	May 10, 2023	June 10, 2023	Pending

- 4. Select an action:
 - **Approve:** The leave request will be marked as approved.
 - o **Reject:** The leave request will be marked as rejected.
- 5. Save the action. The leave status will be updated.

Leave Quota Management

View Leave Quotas

- Go to the **Leave Quota Management** page.
- View the remaining leave quotas for all employees.

Pending Leave Requests of Employees							
SR.No	Employee	Leave Type	Reason	Start Date	End Date	Status	Action
1	abhishek	Sick Leave	i have a fever	May 10, 2023	June 10, 2023	Pending	Edit
							1

Edit Leave Quota

- 1. Navigate to the **Edit Leave Quota** page for a specific employee.
- 2. Update the quotas for:
 - Sick Leave
 - Casual Leave
 - o Privilege Leave
- 3. Save the changes.

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.