

## 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.

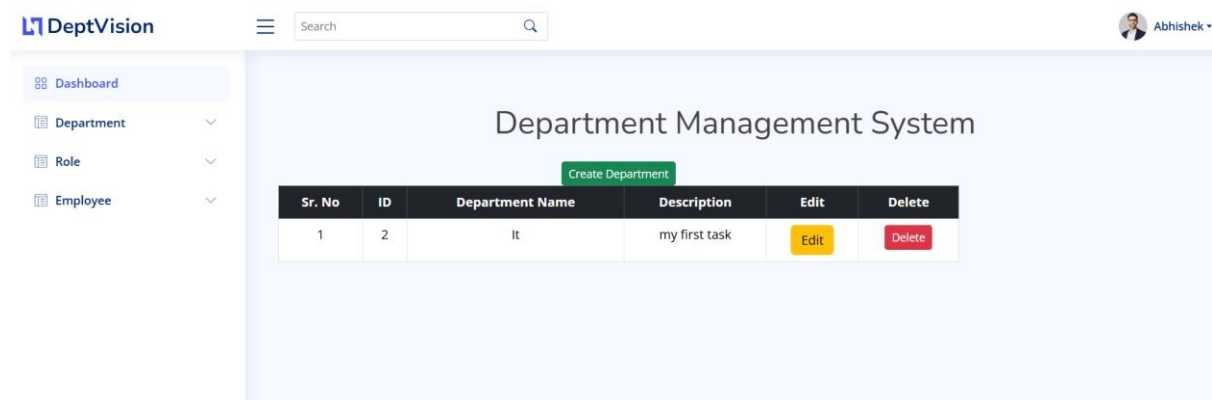
This document provides detailed instructions on how to use the system effectively.

### 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.



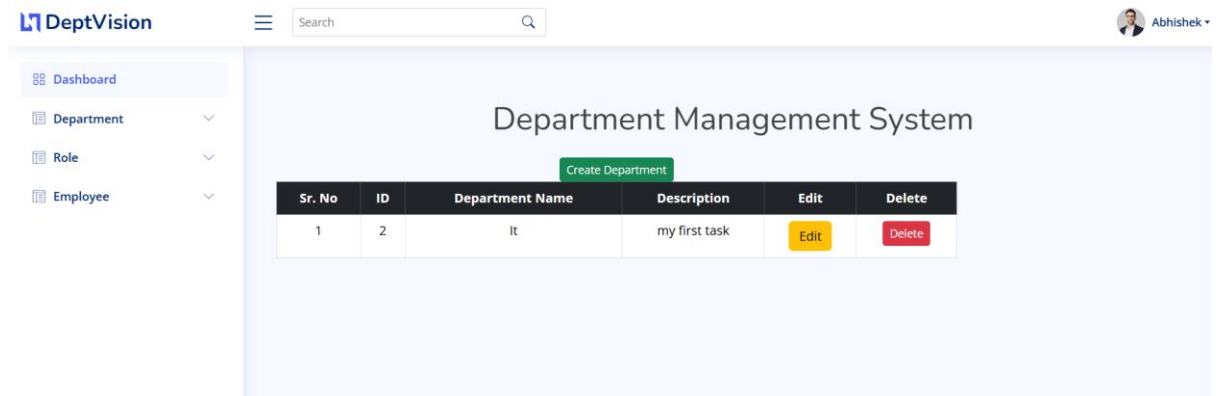
### 3. Features and Instructions for Departments

#### 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

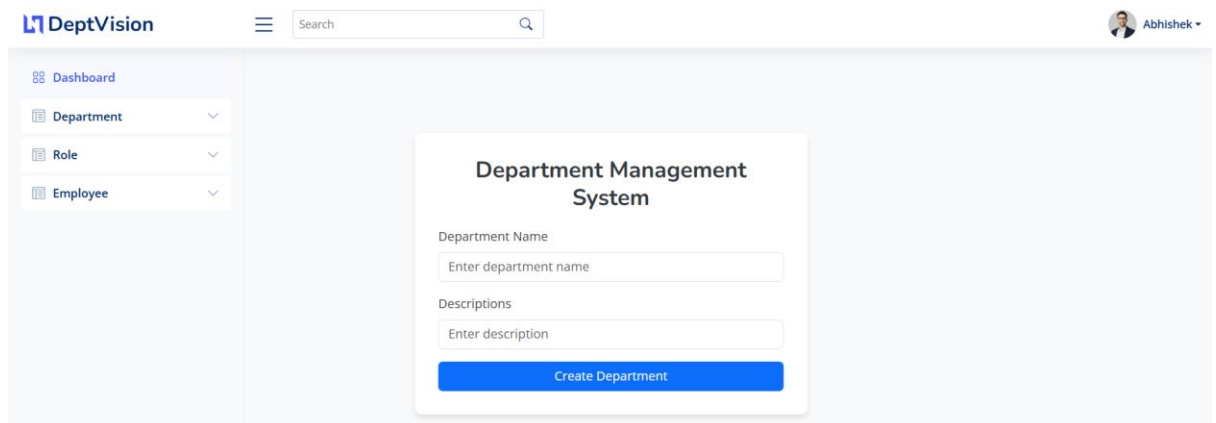
- Description
3. Options to Edit or Delete a department are also displayed.



### 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 'Dashboard' menu and expandable sections for '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. 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

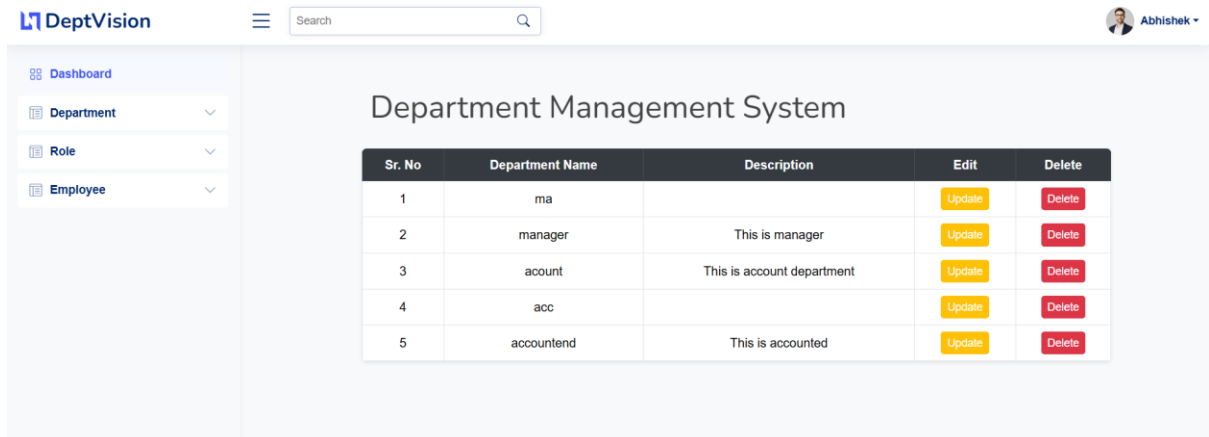
### 4.1 View Roles

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

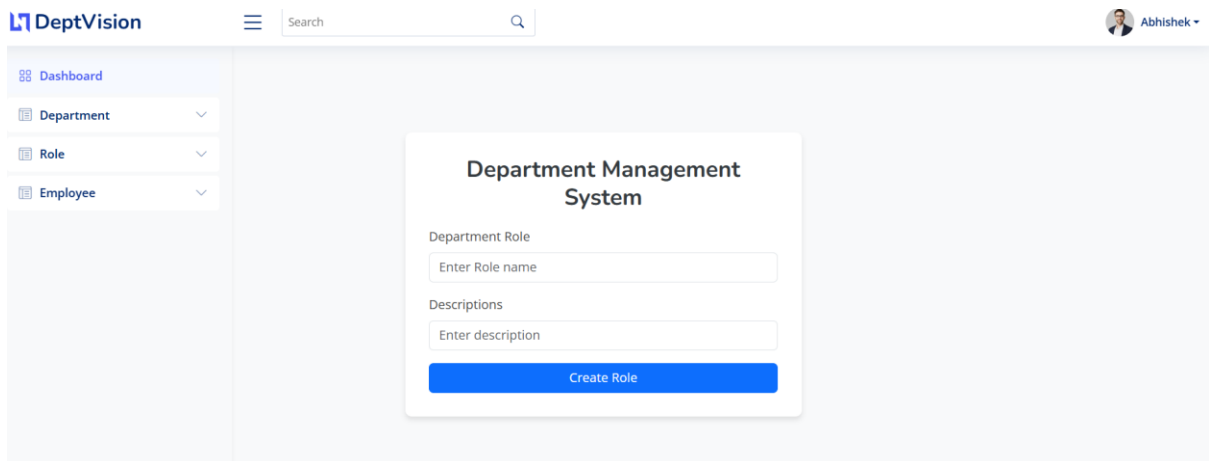
4. Options to Edit or Delete a role are also displayed.



## 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.

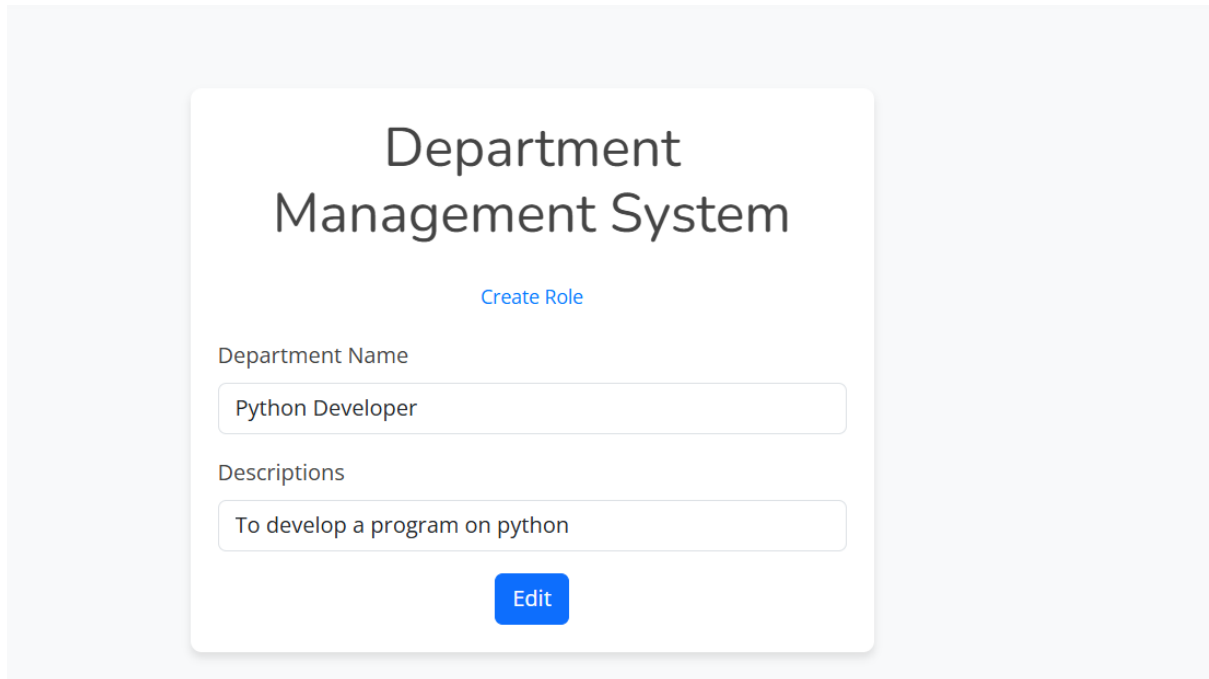


## 4.3 Edit/Update a Role

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.

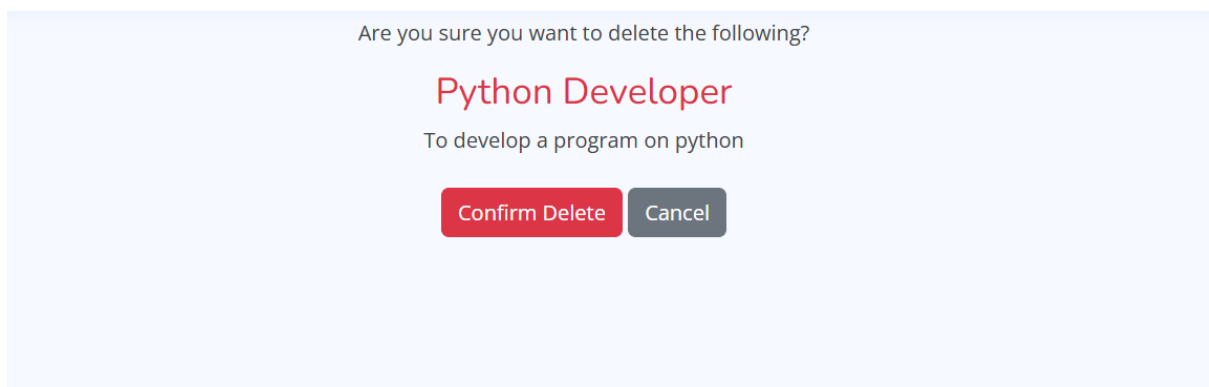


The screenshot shows a web form titled "Department Management System". Below the title is a link "Create Role". The form has two input fields: "Department Name" with the value "Python Developer" and "Descriptions" with the value "To develop a program on python". At the bottom of the form is a blue "Edit"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

The screenshot shows a 'Create Employee' form with the following fields:

- First Name:** Text input with placeholder 'Enter first name'.
- Last Name:** Text input with placeholder 'Enter last name'.
- Username:** Text input with placeholder 'Enter username'.
- Password:** Text input with placeholder 'Enter password'.
- Email:** Text input with placeholder 'Enter email'.
- Mobile:** Text input with placeholder 'Enter mobile number'.
- Department:** Dropdown menu with 'Select a department' and a downward arrow.
- Role:** Dropdown menu with 'Select a role' and a downward arrow.
- Reporting Manager:** Dropdown menu with 'None' and a downward arrow.
- Date of Joining:** Text input with placeholder 'dd-mm-yyyy' and a calendar icon.

At the bottom of the form are two buttons: **Save** (blue) and **Cancel** (grey).

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**?



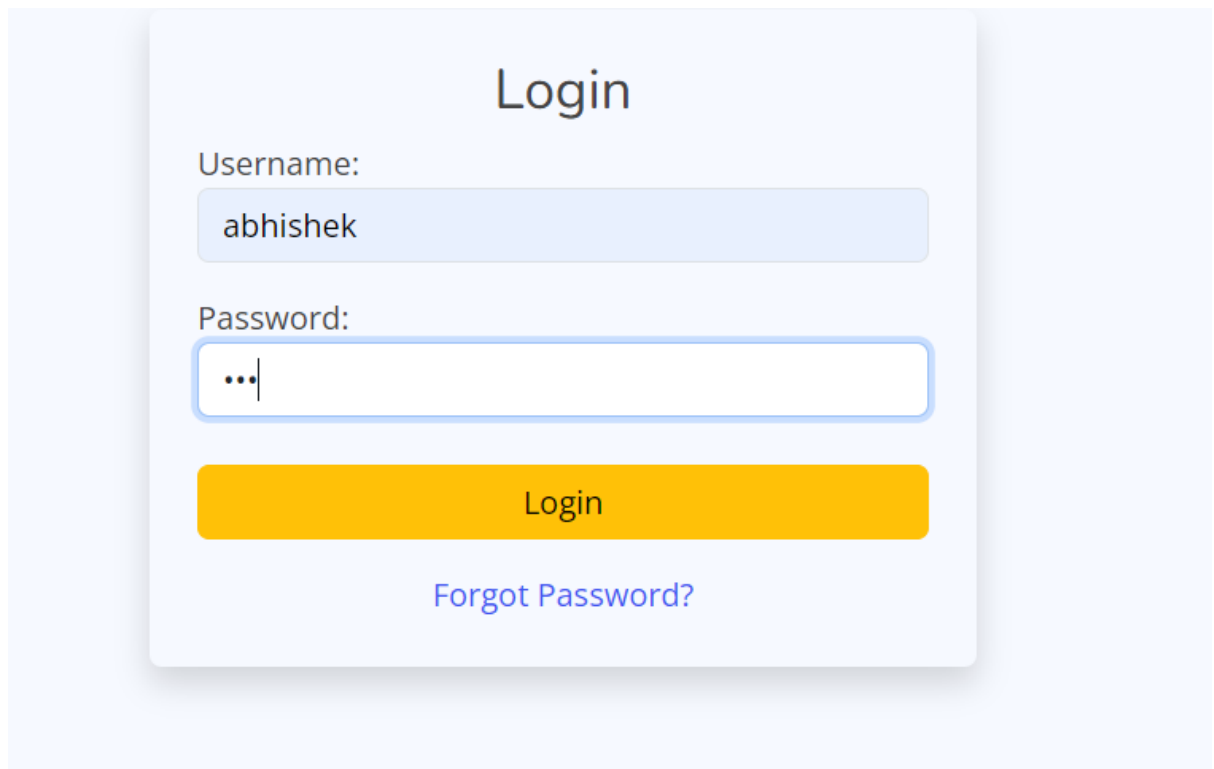
## 6. Features and Instructions of Login/Password Reset

### 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

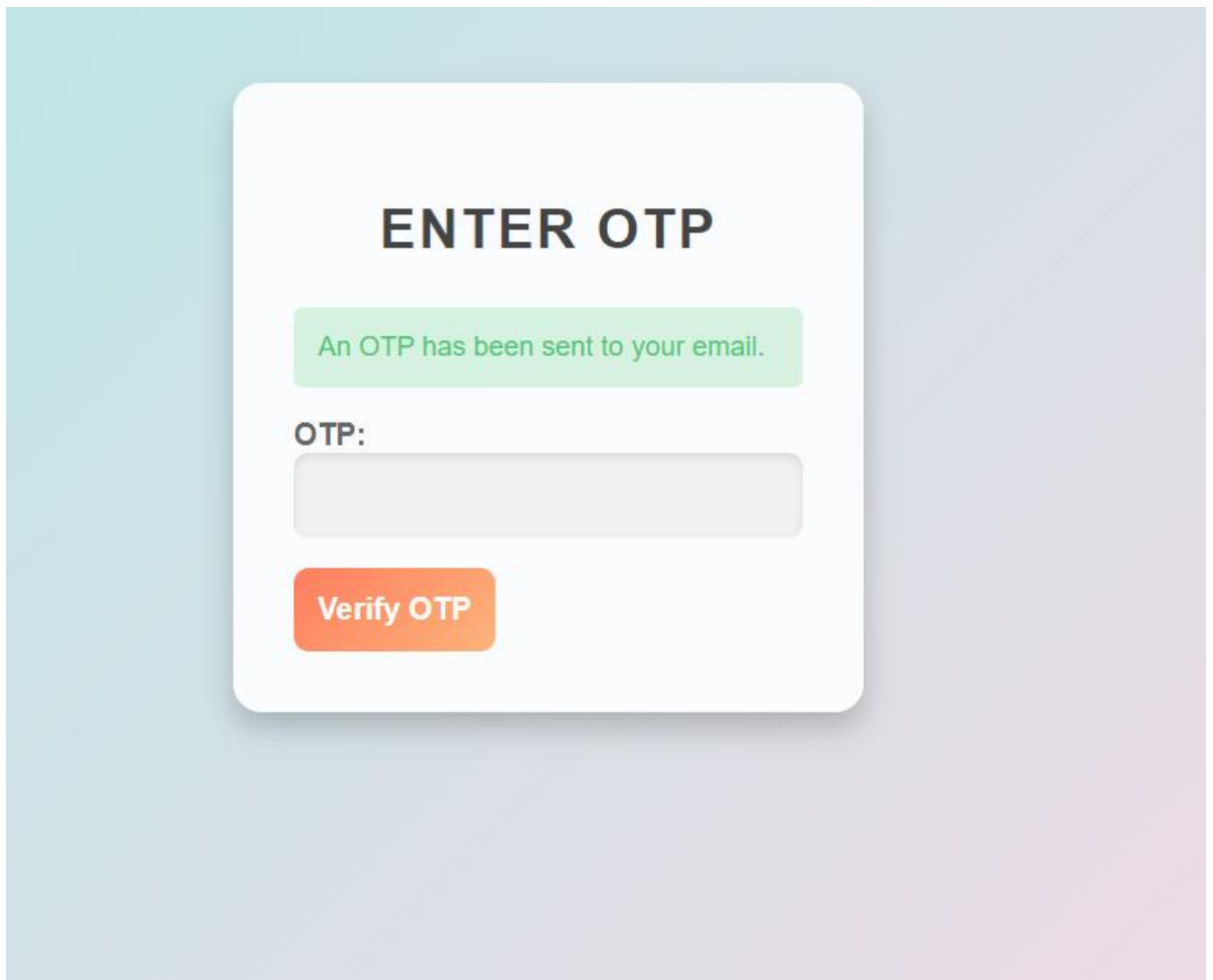
A screenshot of a web application's login page. The page has a light blue background. In the center, there is a white card with a light blue border. The card is titled "Login" in a large, dark blue font. Below the title, there are two input fields. The first is labeled "Username:" and contains the text "abhishek". The second is labeled "Password:" and contains three dots, indicating a password field. Below these fields is a large yellow button with the text "Login" in black. At the bottom of the card, there is a link that says "Forgot Password?" in blue text.

### 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:

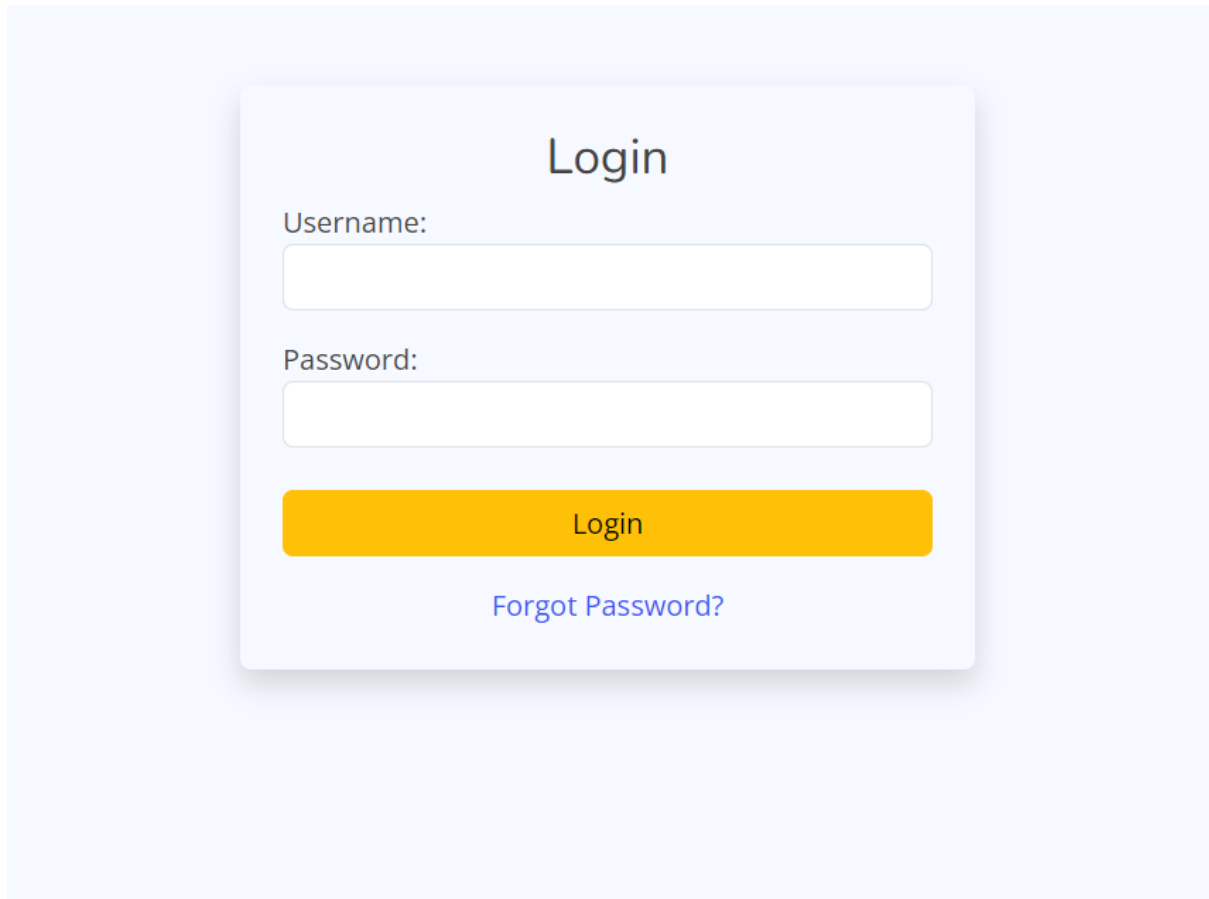
## 6.5 Login Page with Password Reset Message

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

A screenshot of a login page. The page has a light blue background. In the center, there is a white rounded rectangle with a subtle shadow. Inside this rectangle, the word "Login" is centered at the top in a dark grey font. Below it, the label "Username:" is followed by a white input field with a thin grey border. Below that, the label "Password:" is followed by another white input field with a thin grey border. At the bottom of the rectangle, there is a solid yellow button with the word "Login" in black text. Below the button, the text "Forgot Password?" is displayed in a blue, underlined font.

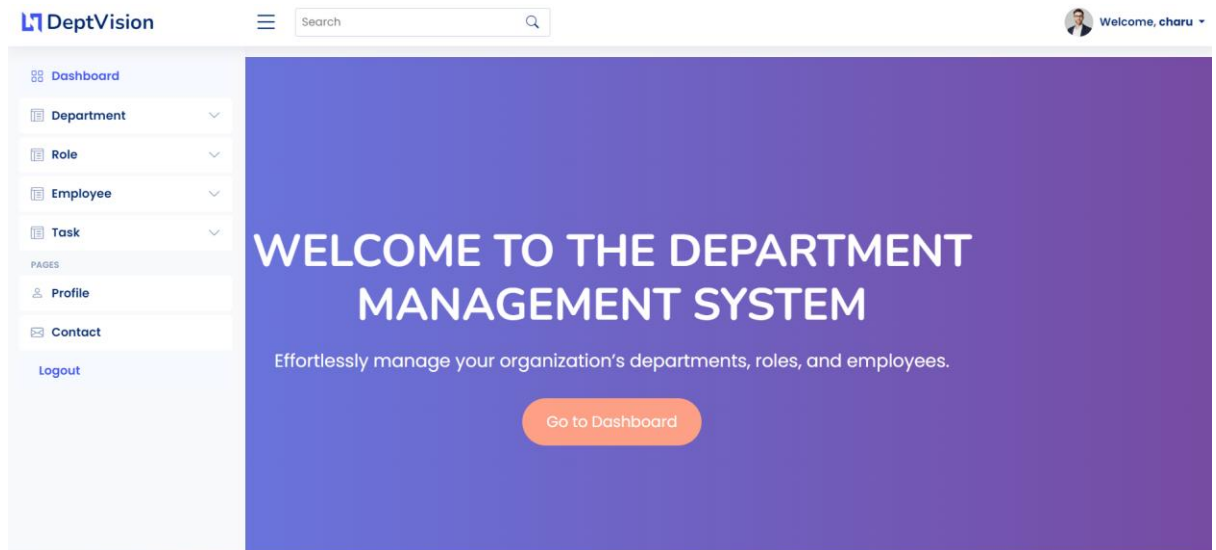
## 6.6 Home Page After Login Success

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



## 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.