User Guide for End Users

Introduction

This guide will provide instructions for accessing and navigating the ETAMS application. It will cover general workflow, key features, and how to use the application's functionality.

Login

ETAMS has users separated into two types: Administrators and Regular Users. The functionality available to the user logged in will vary depending on the user type.

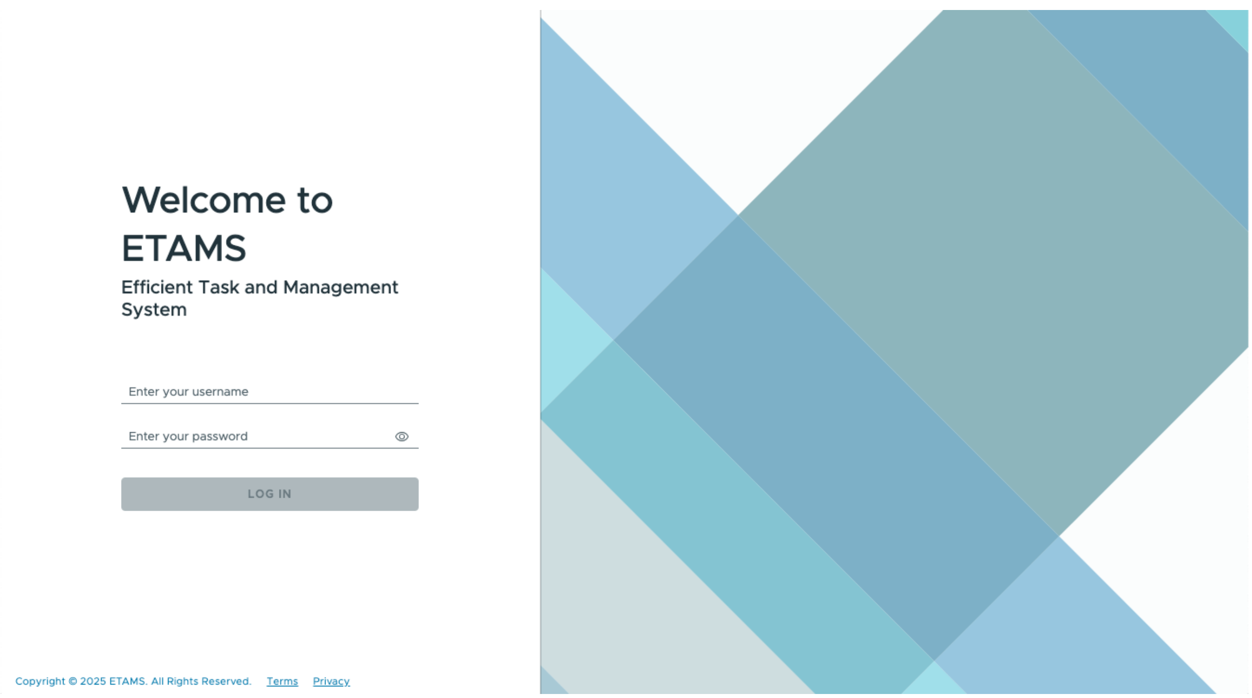


Figure 1 Login Screen

Two logins are provided below:

- Admin account
  - etamsapp
  - etamsapp
- Regular account
  - etamsuser
  - etamsapp

Dashboard

The Dashboard serves as the landing page for Admin accounts, providing a quick, at-a-glance overview of key company metrics. This real-time data helps Admins efficiently assess task progress, monitor workload distribution, and make informed decisions to shape their daily workflow.

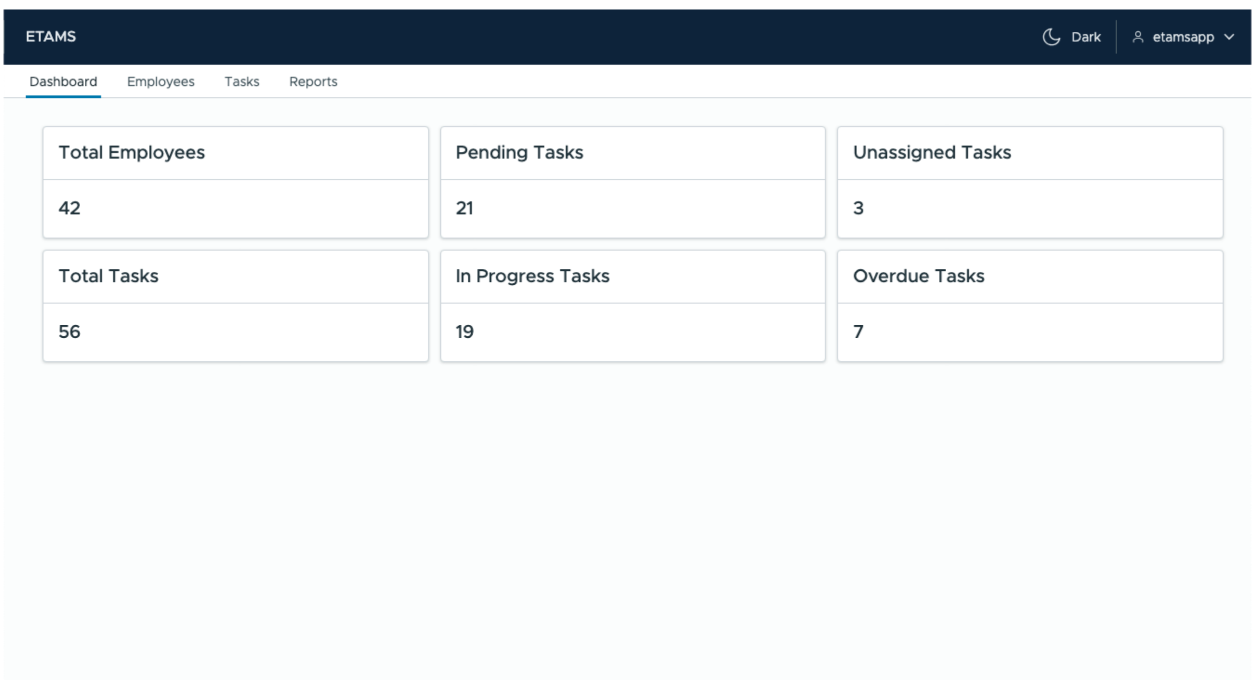


Figure 2 Dashboard

Employees Page (Admins Only)

The Employees page displays a list of all employees in the ETAMS application. Admin users can view employee details, add new employees, and modify or delete existing records. The page also provides key employee metrics, including the total number of employees, the number of admin users, and the number of regular employees.

Additionally, the employees table supports sorting and filtering. Each column header allows sorting data, and an integrated search function enables admins to find specific tasks by filtering within individual columns.

This page and all its actions are **restricted to Admin users only**.

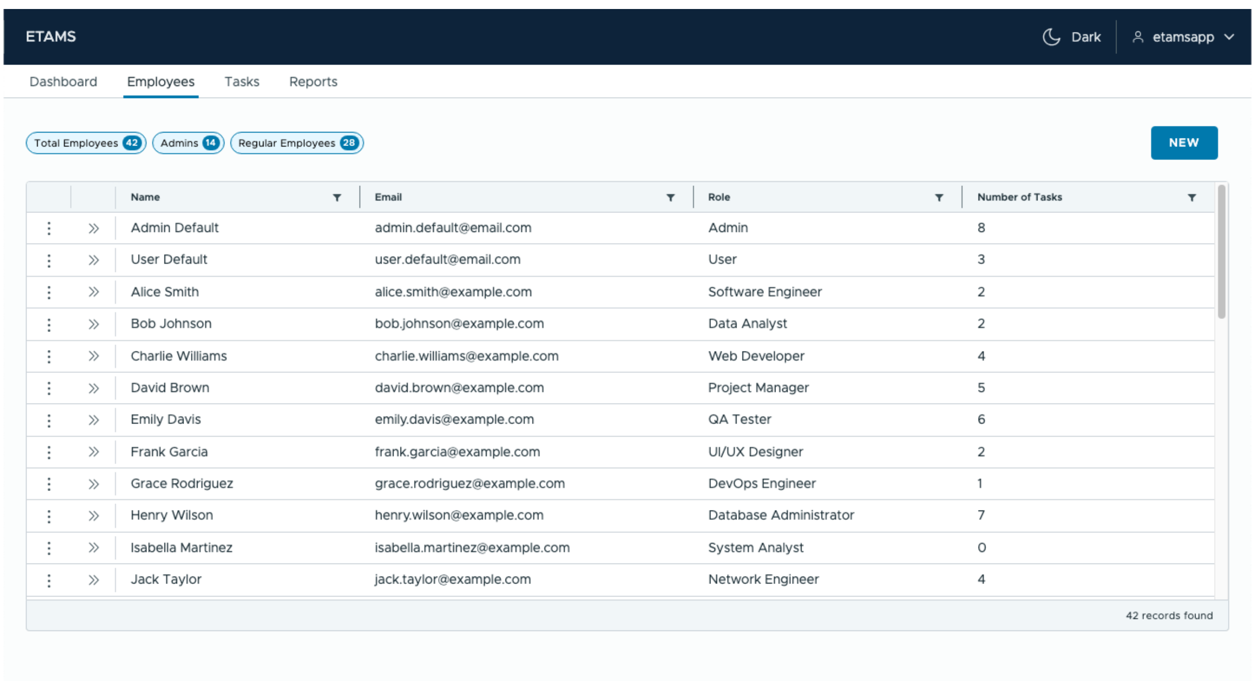


Figure 3 Employees Page

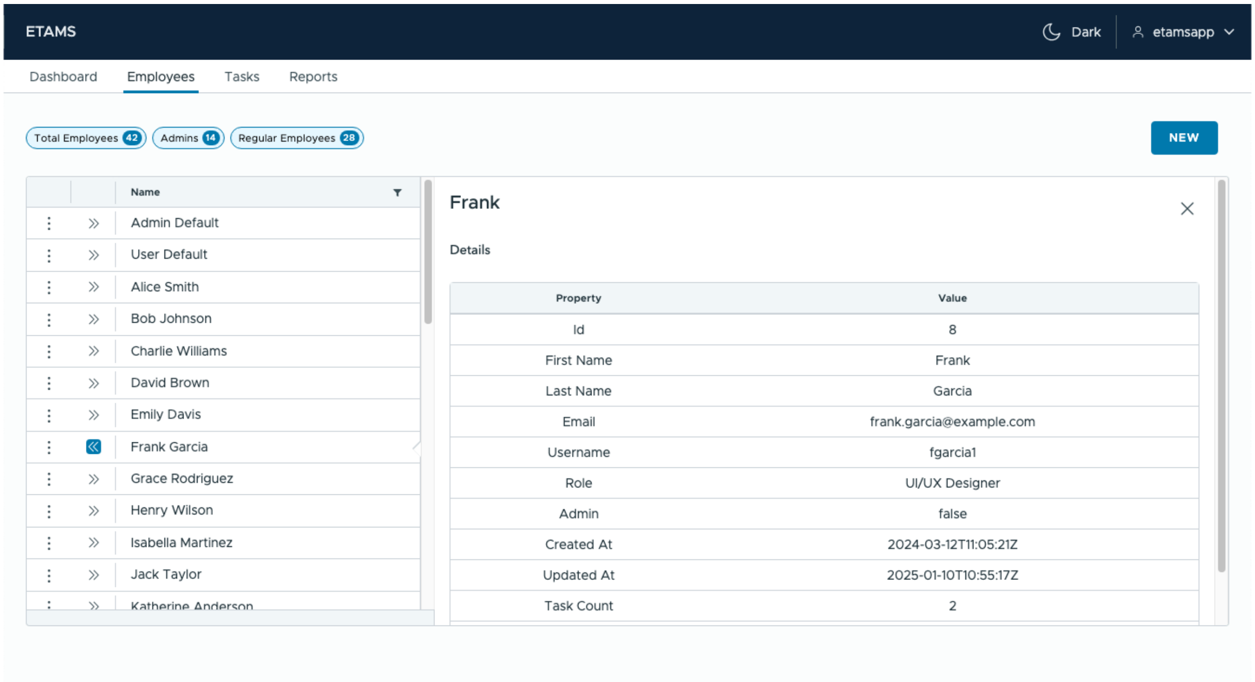


Figure 4 Employee Details

New Employee

Click the ‘New’ button to open the employee creation dialog. Required fields are marked with an asterisk (*), and password requirements are automatically enforced. Once all required information is provided, click ‘Save’ to add the new employee. The newly created employee will then appear in the Employee List.

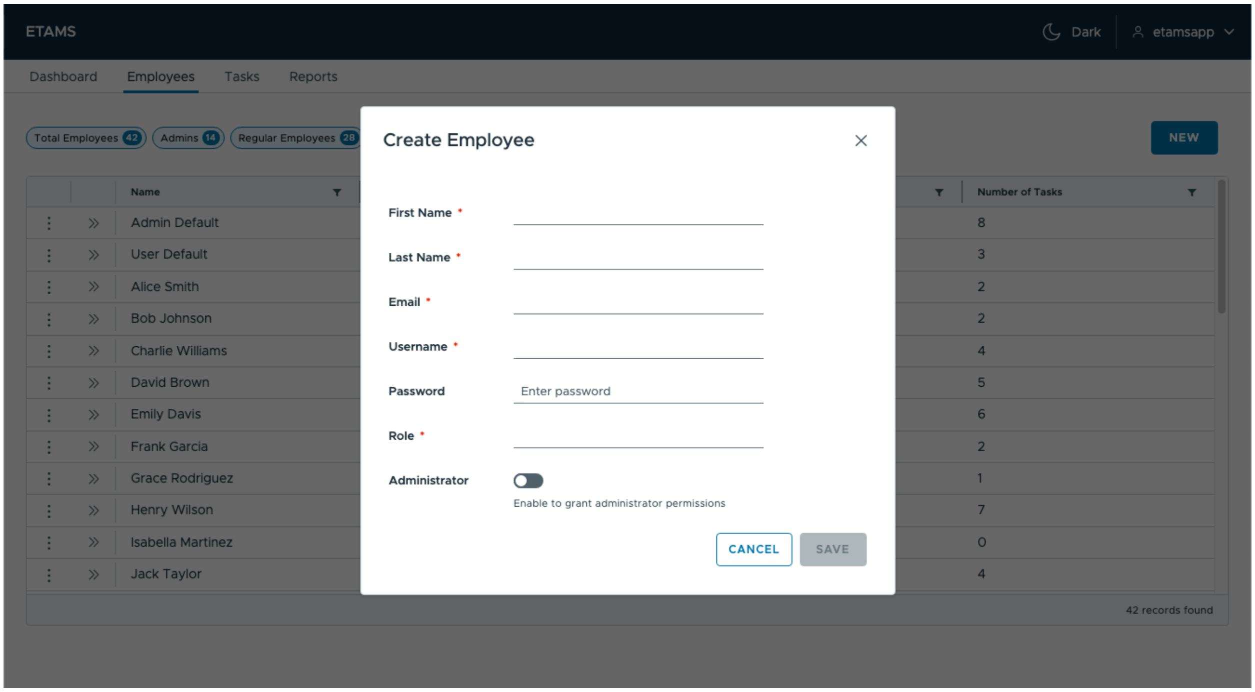


Figure 5 Create Employee Dialog

Edit Employee

To edit an employee, click the three dots to the left of an employee and click 'Edit'.

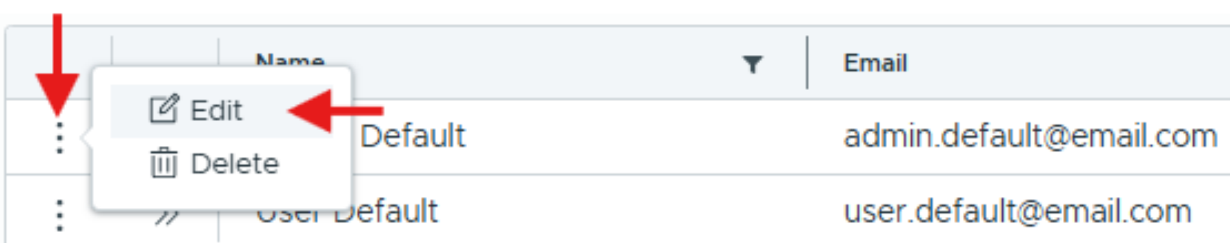


Figure 6 Table Action Options

The Edit Employee dialog will open, and employee details can be updated as needed. Once completed, click ‘Save’ and the employee list will be updated with the employee’s new information.

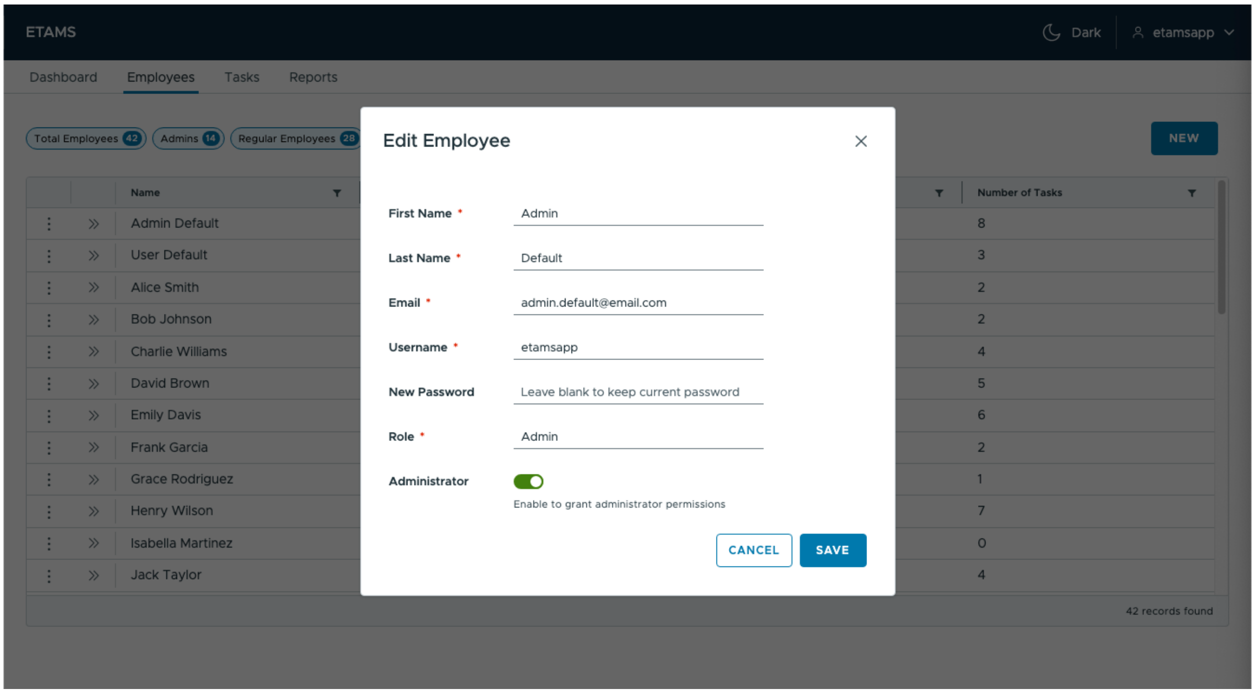


Figure 7 Edit Employee Dialog

Delete Employee

To delete an employee, click the three dots next to the left an employee and click ‘Delete’.

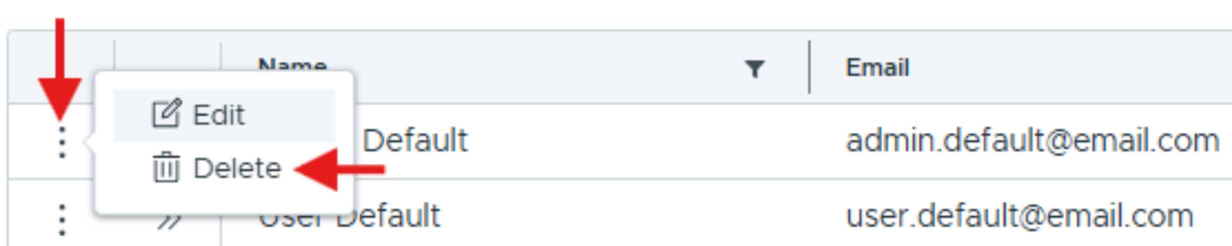


Figure 8 Table Action Options

A dialog window will appear to confirm the deletion and click ‘Confirm’ to delete the employee. The employee will be deleted from the database and the change will be reflected in the employee list. ETAMS will also update any tasks that may be assigned to the deleted employee to Unassigned.

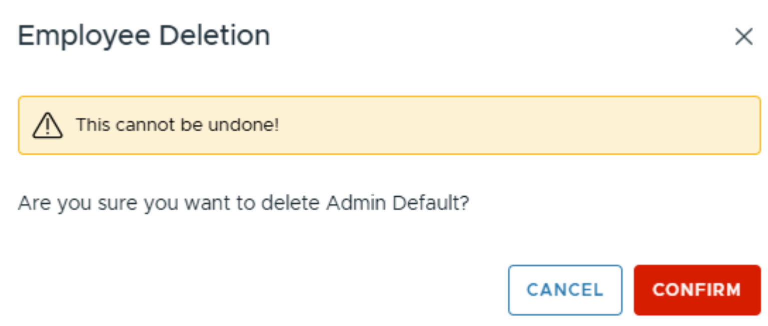


Figure 9 Employee Deletion Confirmation Dialog

Tasks Page (Admin View)

The Tasks page displays data and allows actions based on the user’s role. This section outlines the Admin user experience.

Admin users can view all tasks in the ETAMS system, review task details, add new tasks, and modify or delete existing tasks. The table also supports the same sorting, filtering, and searching functionality as the employees table.

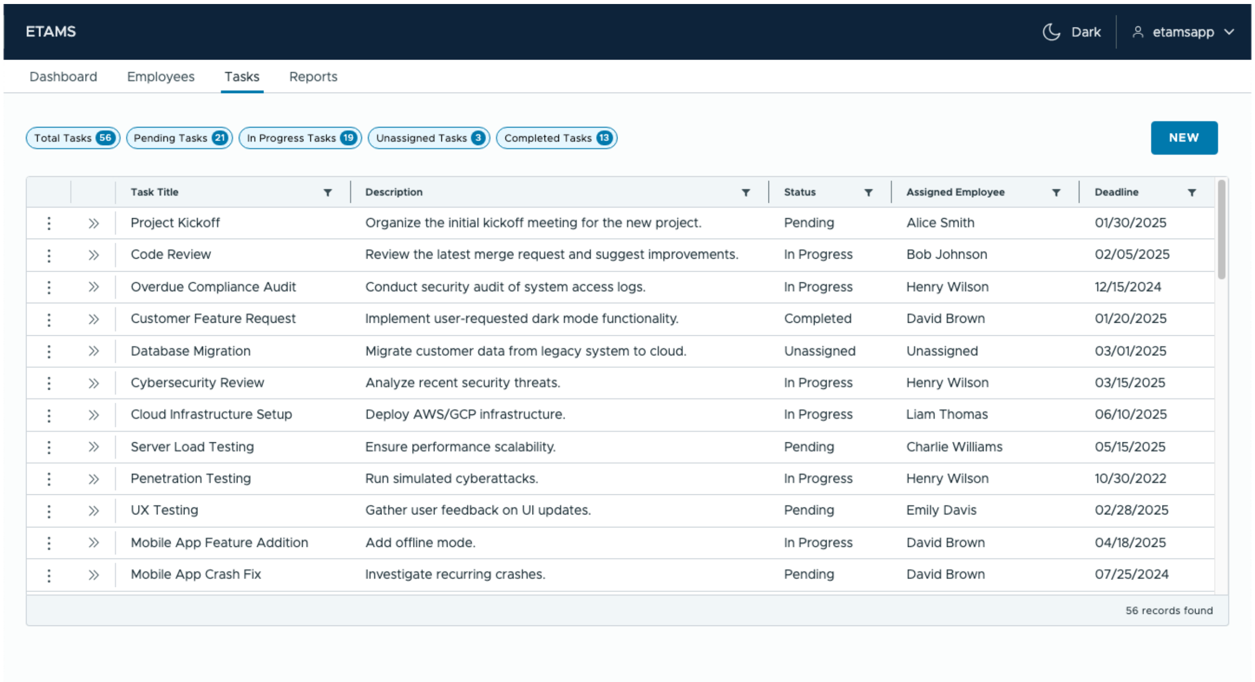


Figure 10 Admin Tasks Page

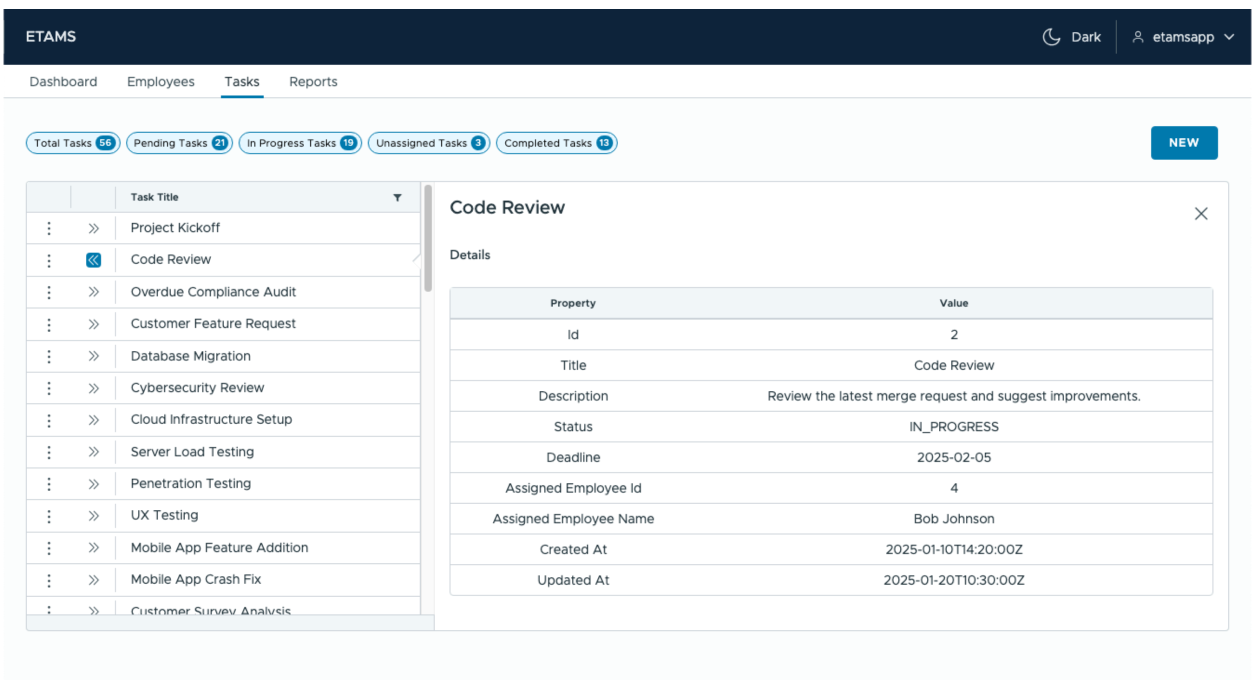


Figure 21 Task Details

New Task

Click the 'New' button to open the task creation dialog. Required fields are marked with an asterisk (*), and the following rules apply:

- A task can remain unassigned upon creation, but both Status and Assigned Employee must be set to Unassigned.
- If a task is unassigned, its Status must be Unassigned.
- If a task is assigned to an employee, its Status cannot be Unassigned.
- The deadline must be a future date.

While Admins can manually update the status of an assigned task to Pending, In Progress, or Complete, the expected workflow is for the task to initially be set to Pending. This allows the assigned employee to review the task and update its status as they begin working on it.

Once all required information is provided, click 'Save' to add the new task. The newly created task will then appear in the Task List.

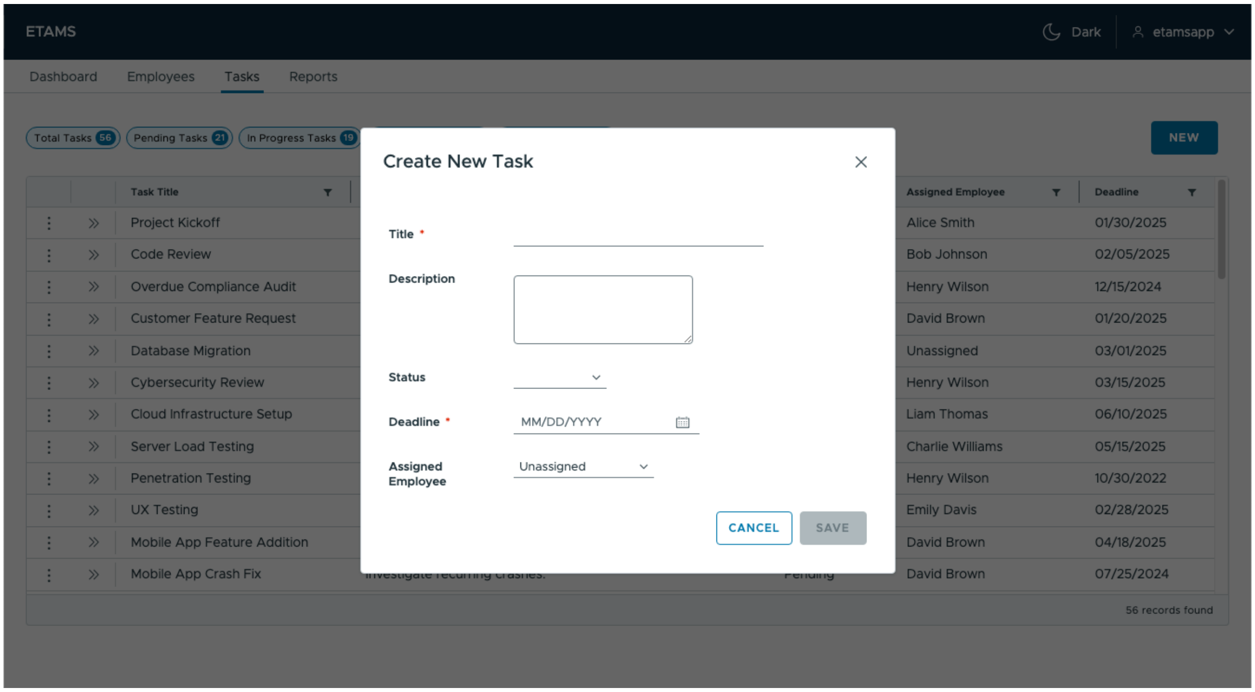


Figure 32 New Task Dialog

Edit Task

To edit a task, click the three dots to the left of a task and click 'Edit'.

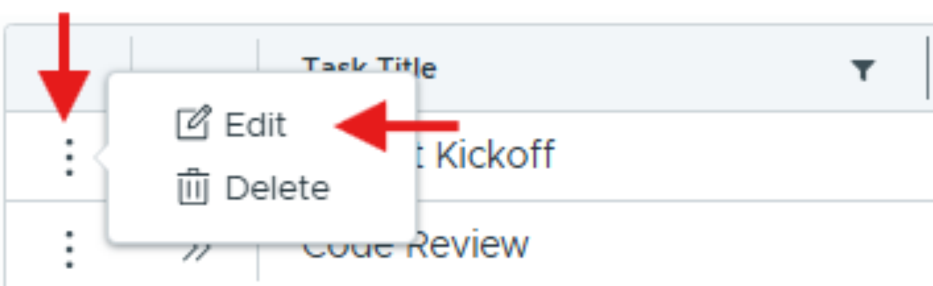


Figure13 Table Action Options

The Edit Task dialog will open, and task details can be updated as needed. Once completed, click 'Save' and the task list will be updated with the task's new information.

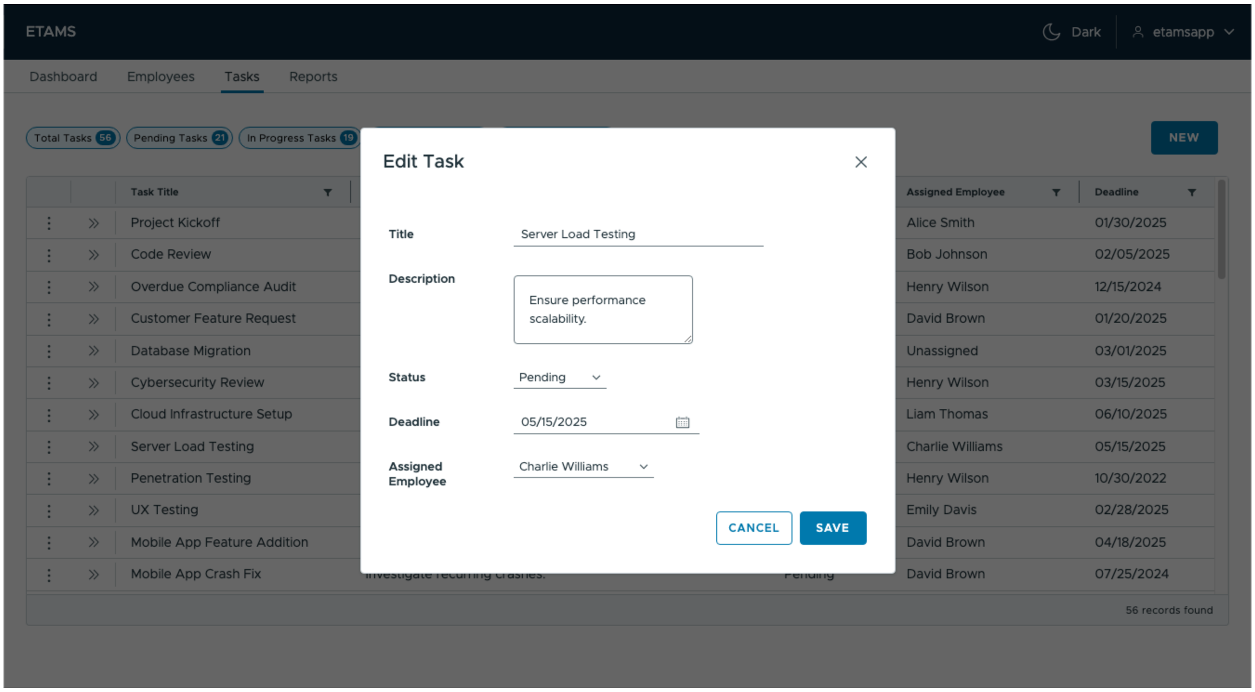


Figure 14 Edit Task Dialog

Delete Task

To delete a task, click the three dots next to the left a task and click ‘Delete’.

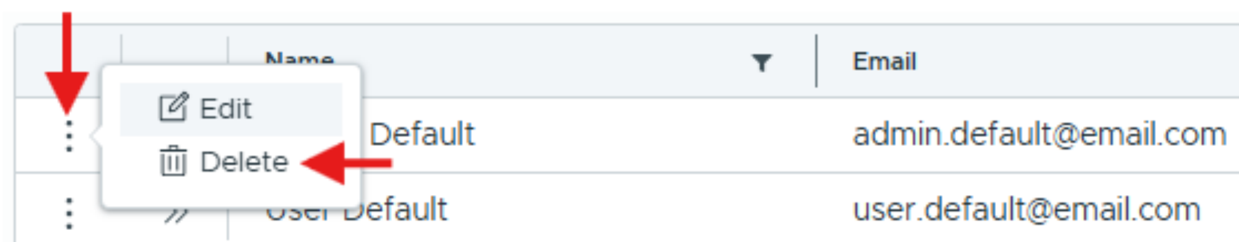


Figure 415 Table Action Options

A dialog window will appear to confirm the deletion and click ‘Confirm’ to delete the task. The task will be deleted from the database and the change will be reflected in the task list.

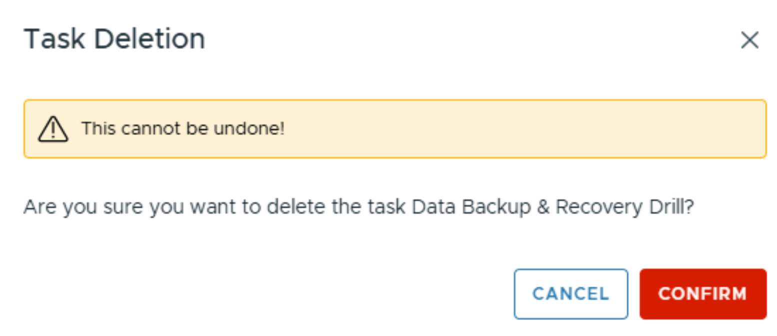


Figure 16 Task Deletion Confirmation Dialog

Tasks Page (Regular User View)

The Tasks page displays data and allows actions based on the user's role. This section outlines the Regular user experience.

When a Regular user logs in, the Tasks page serves as their homepage, displaying only the tasks assigned to them. Since all displayed tasks are user-specific, the Assigned Employee field is hidden, as it is no longer relevant.

Regular users can review task details, update task information, and modify task status as needed. The table also supports the same sorting, filtering, and searching functionality as the employees table.

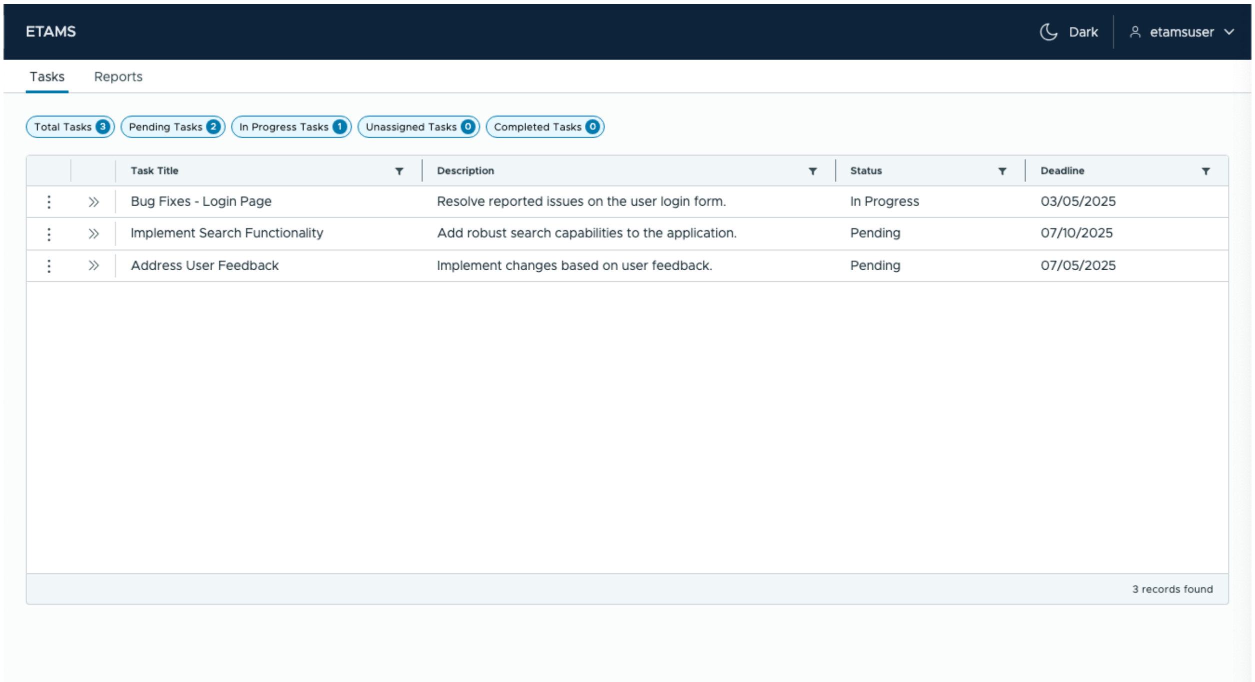


Figure 17 Regular Tasks Page

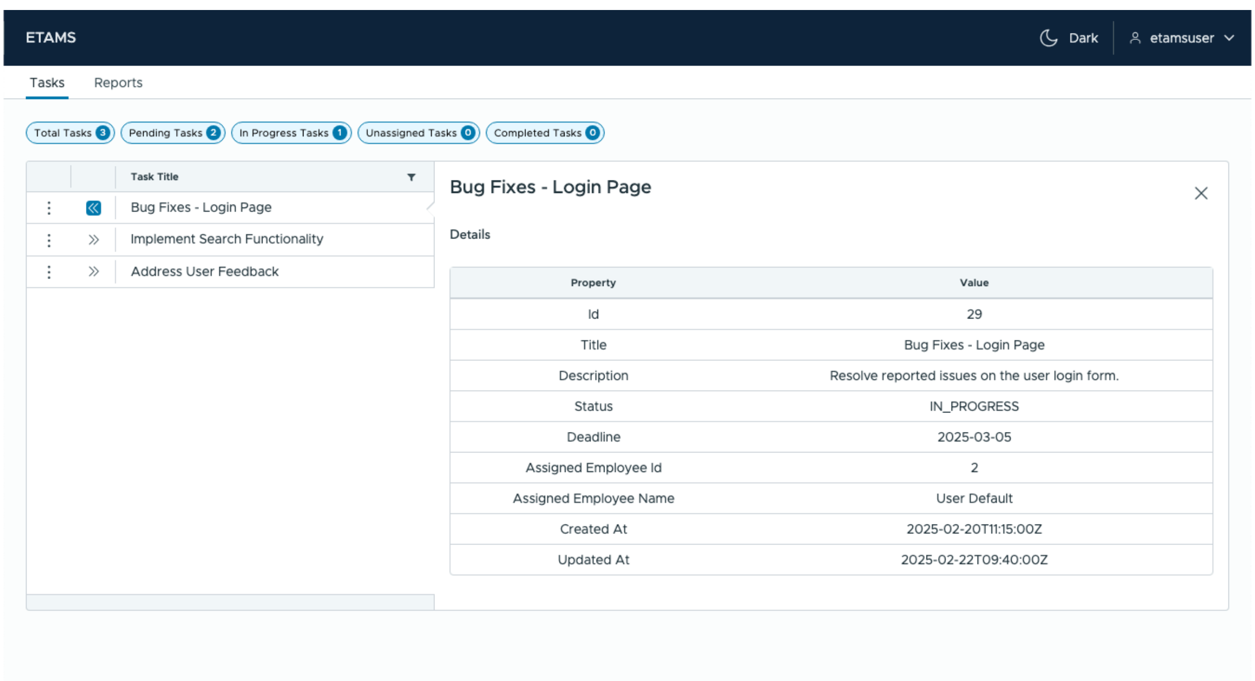


Figure 18 Task Details

Edit Task

To edit a task, click the three dots to the left of a task and click 'Edit'. Note that a regular user will not have the option to delete a task.

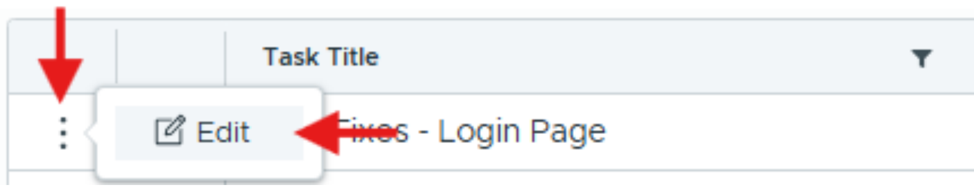


Figure 19 Table Action Options

The Edit Task dialog will open, and task details can be updated as needed. For regular users, the option to change the Assigned Employee will be limited to Unassigned. This is to prevent employees from reassigning tasks to other employees without Admin approval. Once completed, click 'Save' and the task list will be updated with the task's new information.

Reports Page

The Reports page allows all users to generate reports that provide insights into the company's overall performance. These reports can help users analyze trends, identify operational gaps, and support data-driven business decisions.

Overdue Tasks Report

The Overdue Tasks Report allows users to generate a report listing all tasks that have exceeded their deadline. This report can be particularly useful at the start of the business day, enabling users to quickly identify and prioritize tasks that require immediate attention.

This report is the default report and to generate the report, click the ‘Generate’ button to load any overdue tasks:

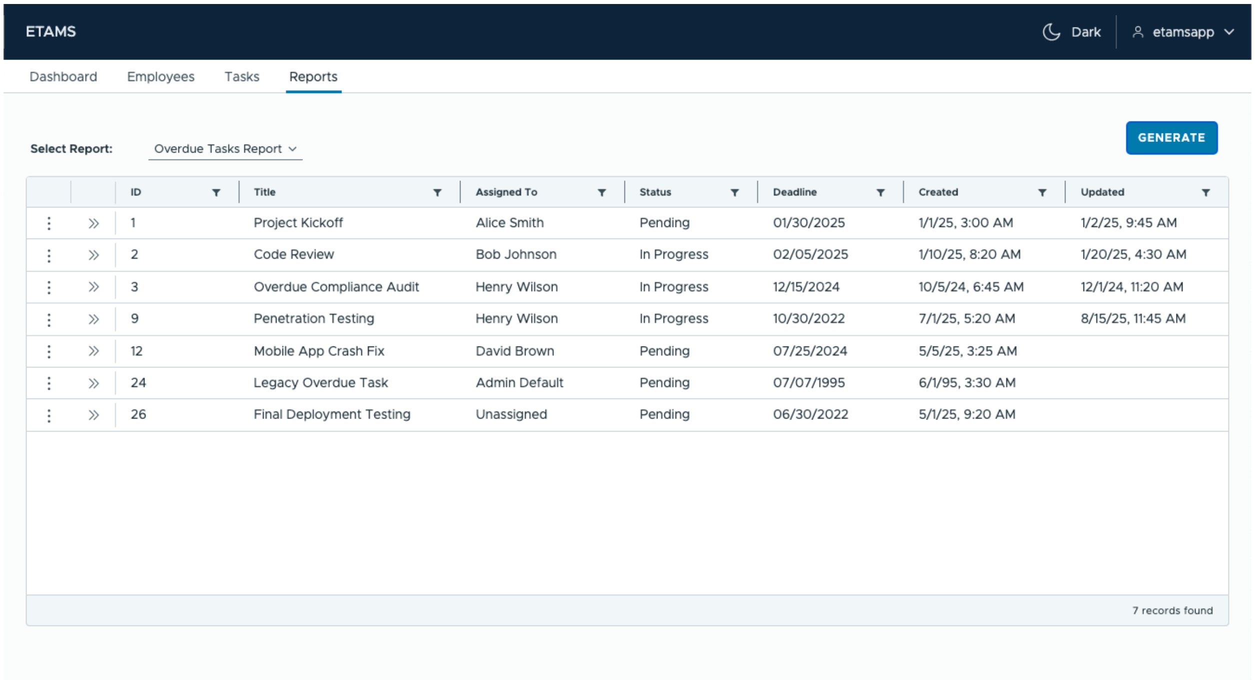


Figure 50 Overdue Tasks Report

Task Activity Report

The Task Activity report provides key task data, including when a task was created and its most recent update. This report helps users identify idle tasks, track performance metrics, and monitor workflow efficiency.

Users can generate a report for all tasks or specify a custom date range to focus on a specific period.

To generate a Task Activity report, click the ‘Select Report’ dropdown menu and select ‘Task Activity Report’:

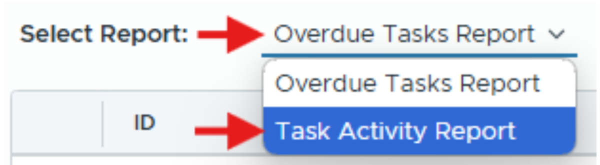
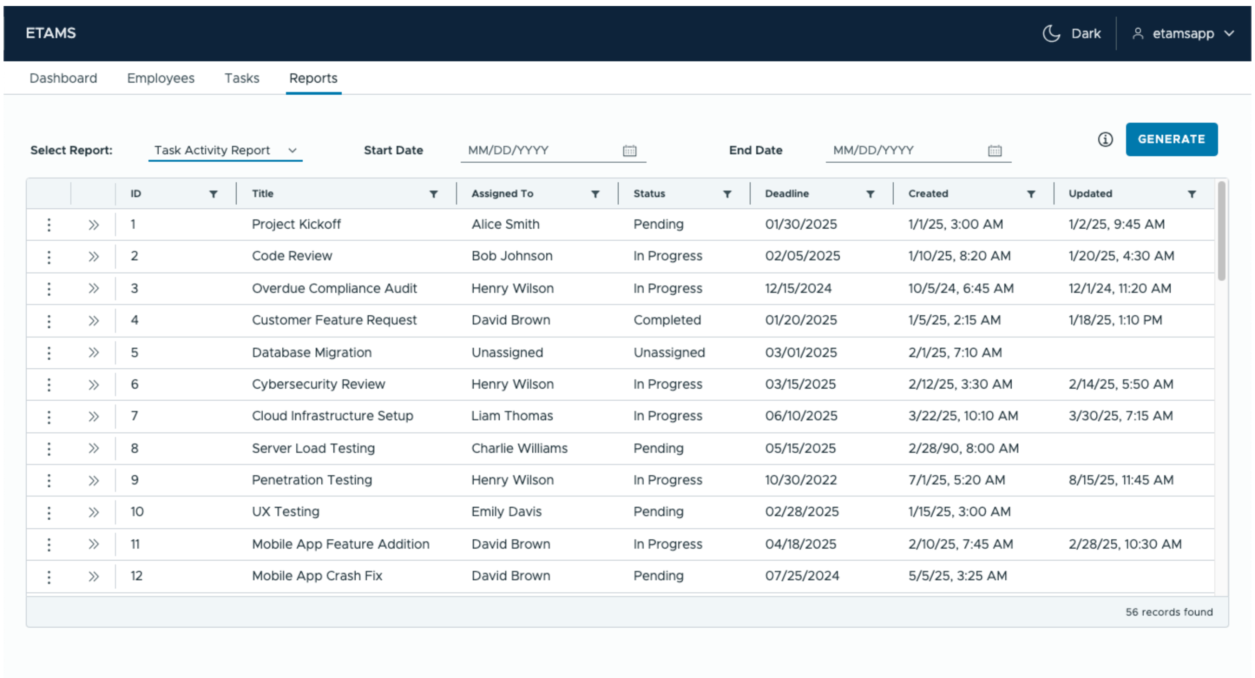


Figure 61 Report Selection Dropdown

To create a report with all task data, leave the ‘Start Date’ and ‘End Date’ fields empty and click ‘Generate’:



ID	Title	Assigned To	Status	Deadline	Created	Updated
1	Project Kickoff	Alice Smith	Pending	01/30/2025	1/1/25, 3:00 AM	1/2/25, 9:45 AM
2	Code Review	Bob Johnson	In Progress	02/05/2025	1/10/25, 8:20 AM	1/20/25, 4:30 AM
3	Overdue Compliance Audit	Henry Wilson	In Progress	12/15/2024	10/5/24, 6:45 AM	12/1/24, 11:20 AM
4	Customer Feature Request	David Brown	Completed	01/20/2025	1/5/25, 2:15 AM	1/18/25, 1:10 PM
5	Database Migration	Unassigned	Unassigned	03/01/2025	2/1/25, 7:10 AM	
6	Cybersecurity Review	Henry Wilson	In Progress	03/15/2025	2/12/25, 3:30 AM	2/14/25, 5:50 AM
7	Cloud Infrastructure Setup	Liam Thomas	In Progress	06/10/2025	3/22/25, 10:10 AM	3/30/25, 7:15 AM
8	Server Load Testing	Charlie Williams	Pending	05/15/2025	2/28/90, 8:00 AM	
9	Penetration Testing	Henry Wilson	In Progress	10/30/2022	7/1/25, 5:20 AM	8/15/25, 11:45 AM
10	UX Testing	Emily Davis	Pending	02/28/2025	1/15/25, 3:00 AM	
11	Mobile App Feature Addition	David Brown	In Progress	04/18/2025	2/10/25, 7:45 AM	2/28/25, 10:30 AM
12	Mobile App Crash Fix	David Brown	Pending	07/25/2024	5/5/25, 3:25 AM	

Figure 22 All Tasks Selected

To specify a date range for the report, enter the start date and end date in the respective fields, then click ‘Generate’. Select a date using the date picker by clicking the calendar icon or manually enter it in the date field.

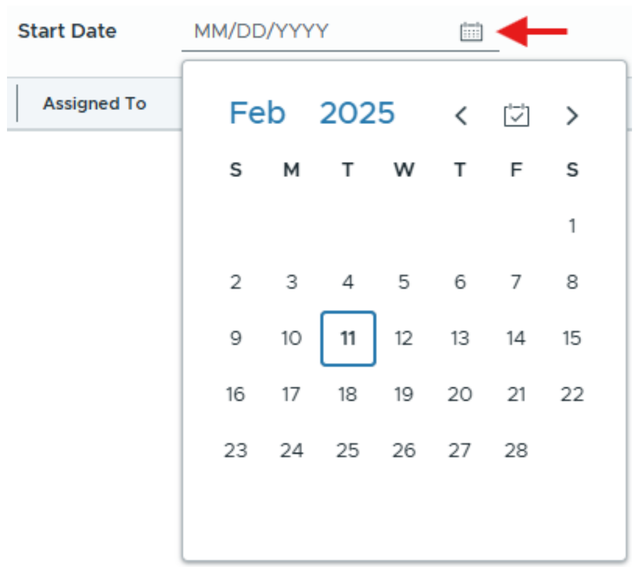


Figure 27 Date Picker

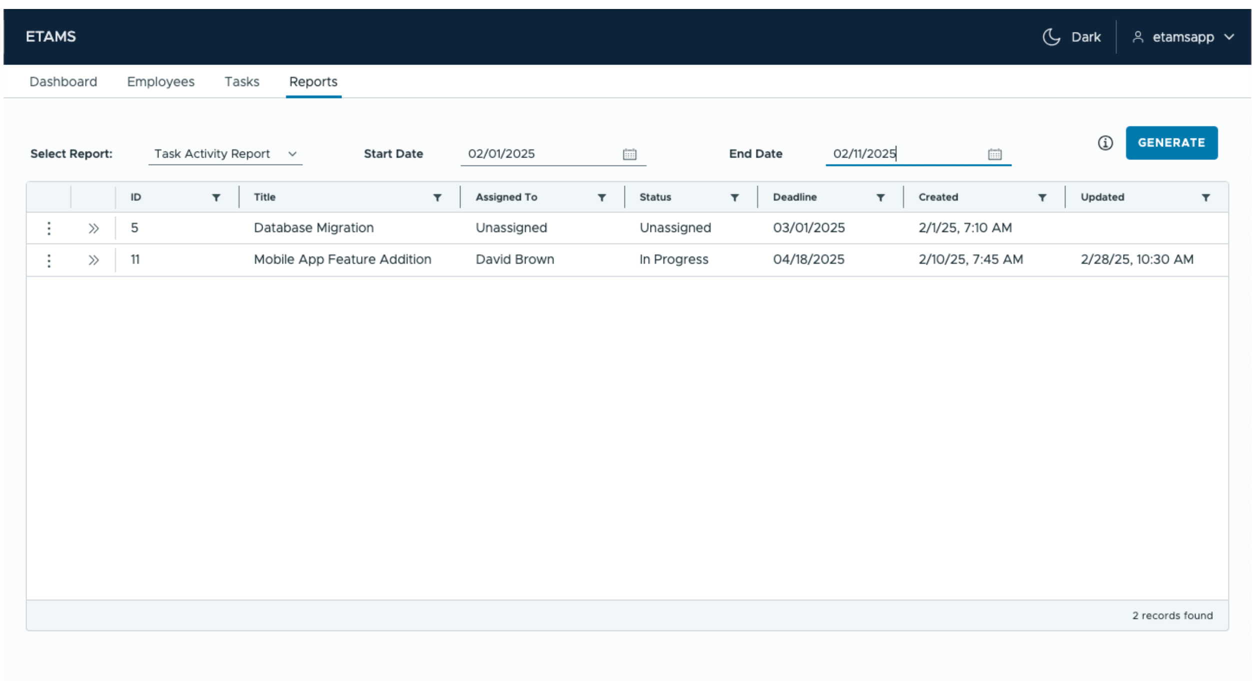


Figure 24 Task Activity Report with Date Ranges

Logout

To log out of the ETAMS application, click the username in the upper lefthand corner and click ‘Log out’:

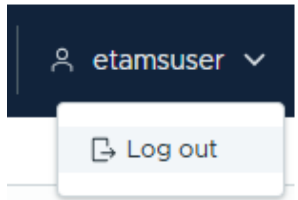


Figure 25 Log Out of ETAMS

Light and Dark Mode

ETAMS provides light and dark mode options with light mode set as the default. Dark mode can be enabled by clicking the ‘Dark’ button to the left of the username in the upper lefthand corner:

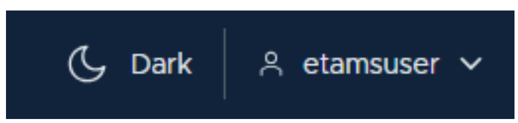


Figure 26 Dark Mode Toggle Button

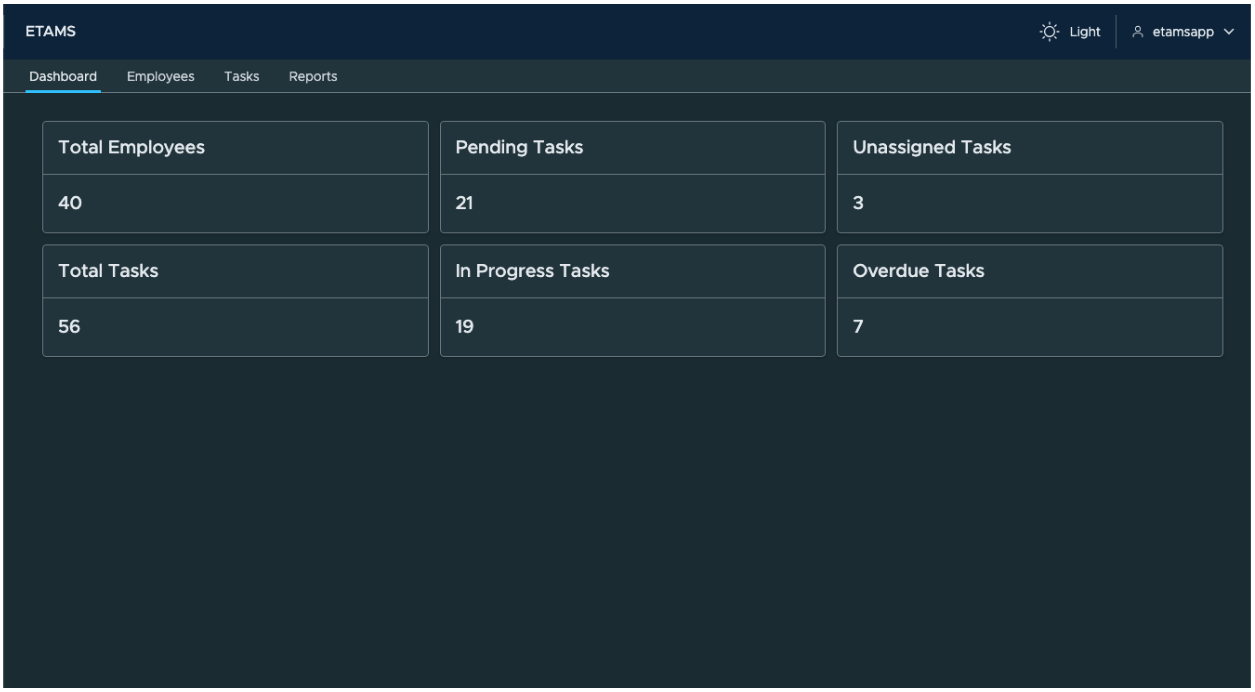


Figure 27 Dark Mode Enabled

To switch back to light mode, click the 'Light' button in the same location:

Figure 288 Light Mode Toggle Button