End User Documentation for Department Management System

1. Overview

The Department Management System is a Django-based web application designed to help users manage departmental information efficiently. It enables users to perform the following actions:
- View a list of active departments
- Add a new department
- Edit an existing department's details
- Delete (soft delete) a department

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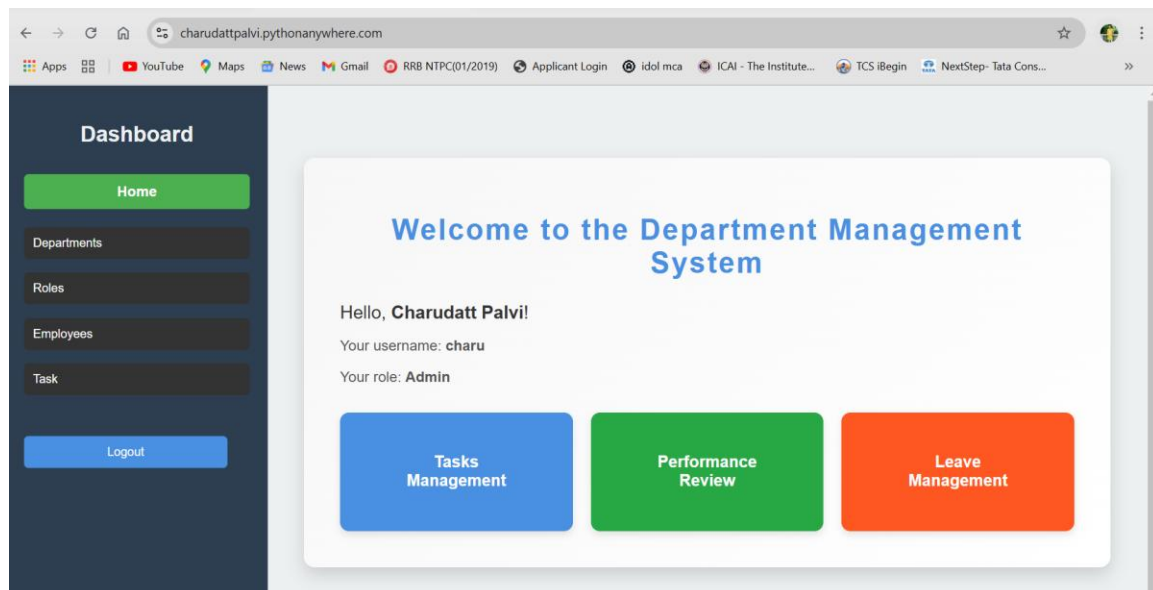
2. Accessing the System

The system is 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://charudattpalvi.pythonanywhere.com/` (for live server)
   `http://127.0.0.1:8000/` (for local server)

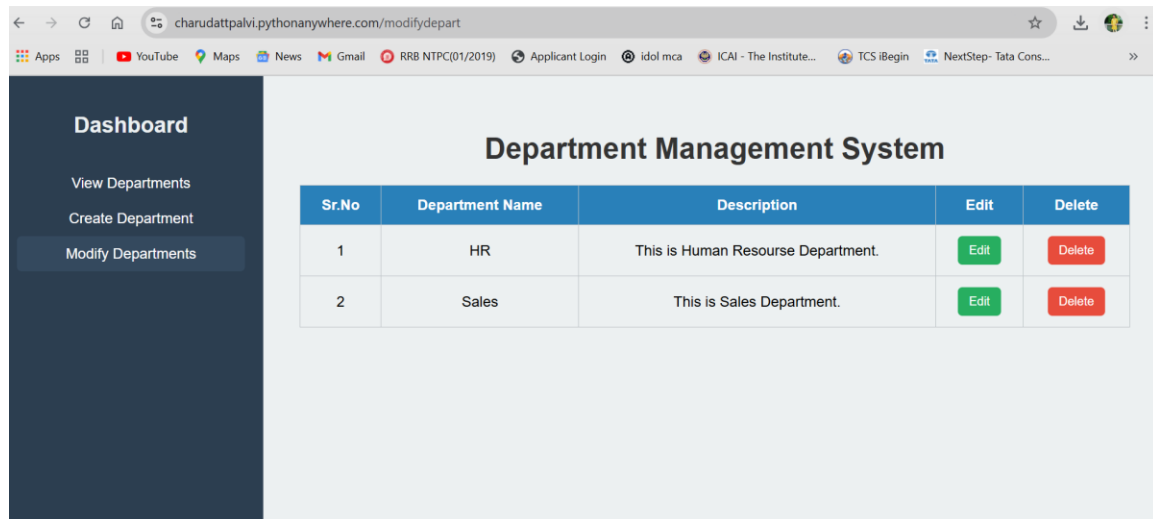This will open the homepage of the Department Management System.

3. Features and Instructions of Department:-

3.1 View Departments

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

1. Go to the homepage (`https://charudattpalvi.pythonanywhere.com/modifydepart` or `http://127.0.0.1:8000/modifydepart`).

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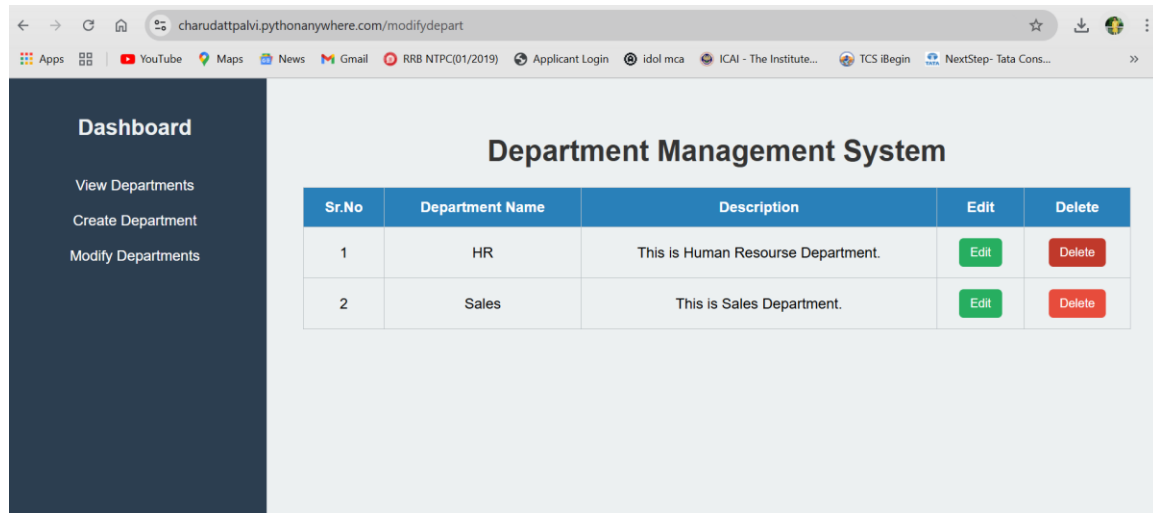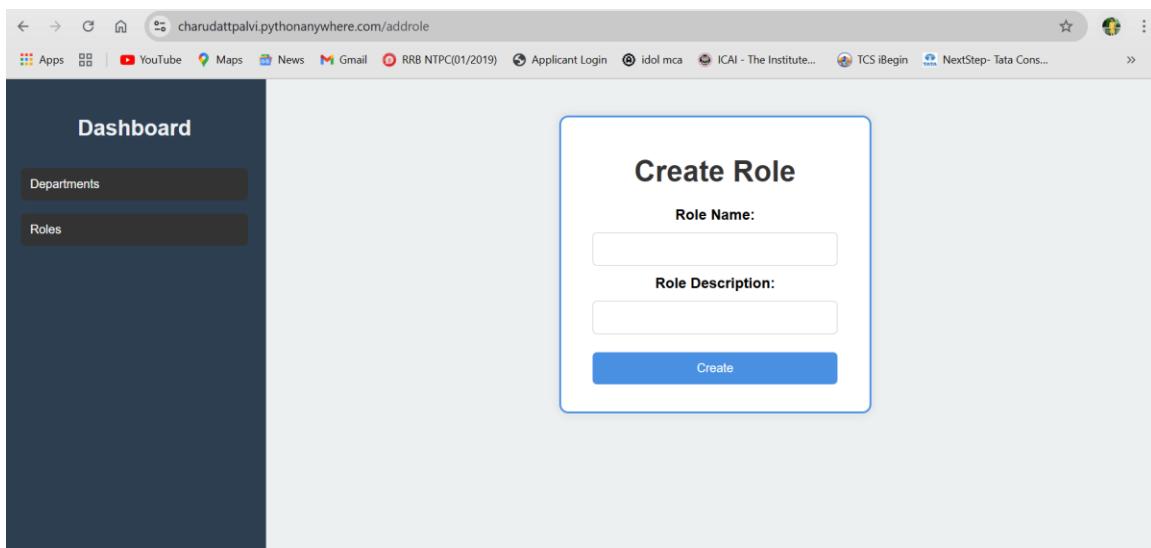5. The updated details will be reflected in the list.

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.
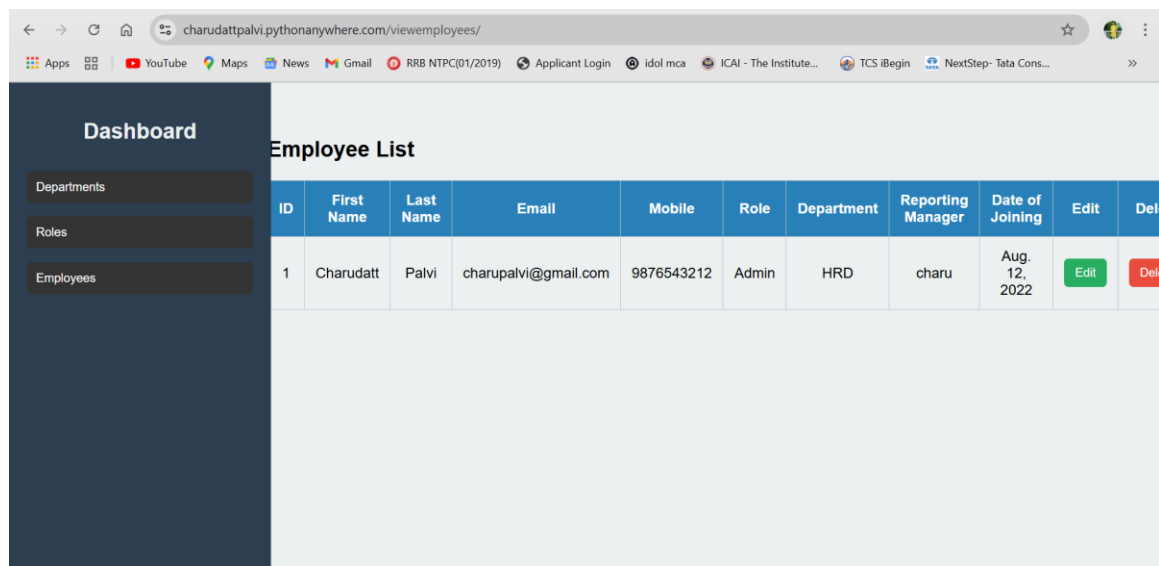3. The department will no longer appear in the list.

4. Features and Instructions of Role:-

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://charudattpalvi.pythonanywhere.com/viewrole` or `http://127.0.0.1:8000/viewrole`).
2. The table will display the following details:
   - Role ID
   - Role Name
   - Description
3. Options to Edit or Delete a role are also displayed.
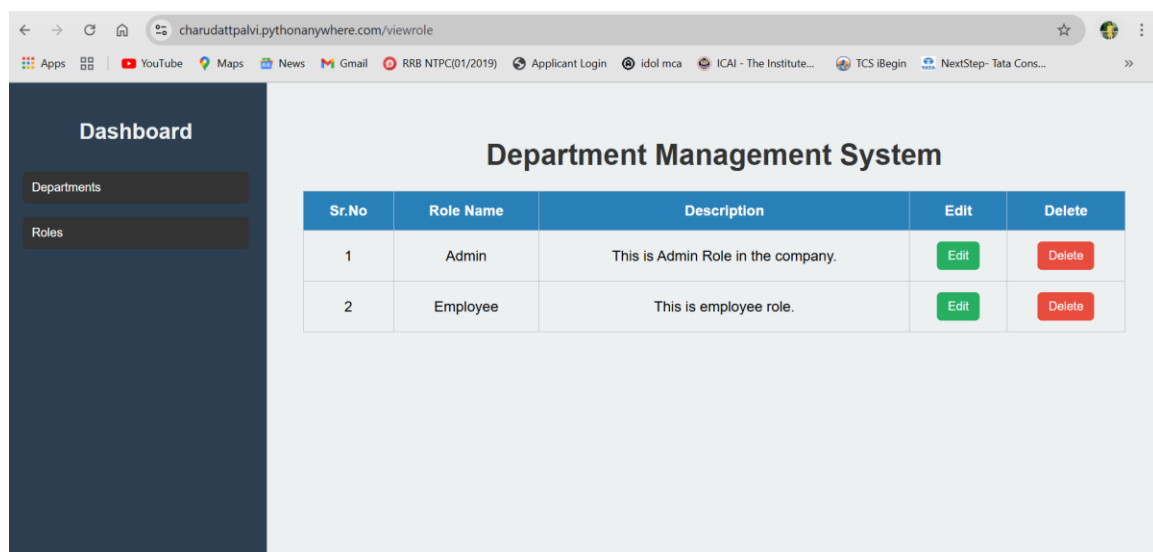
4.2 Add a New Role

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.
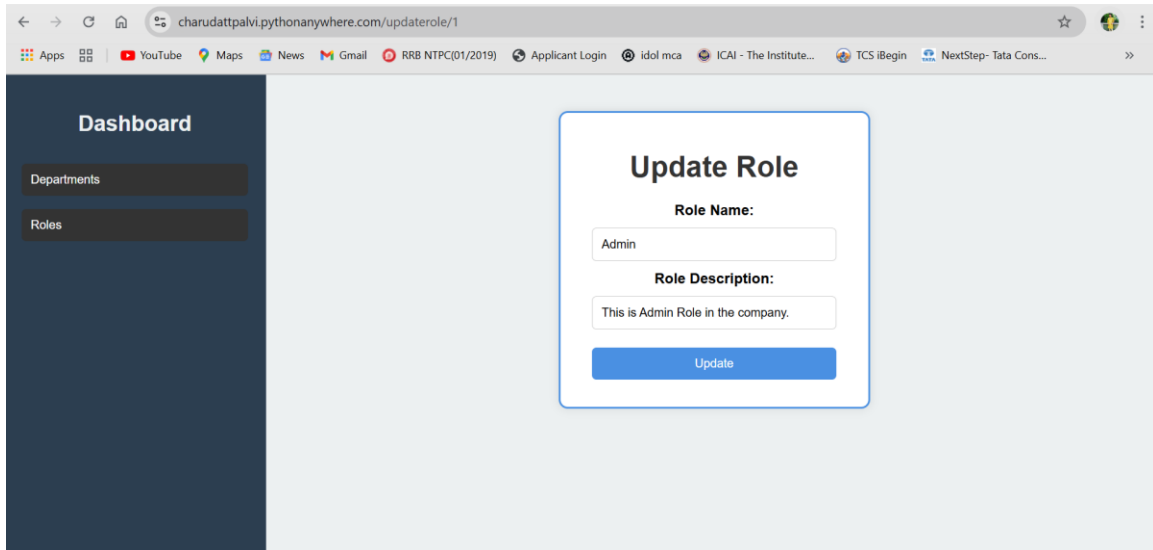
4.4 Delete a Role

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.
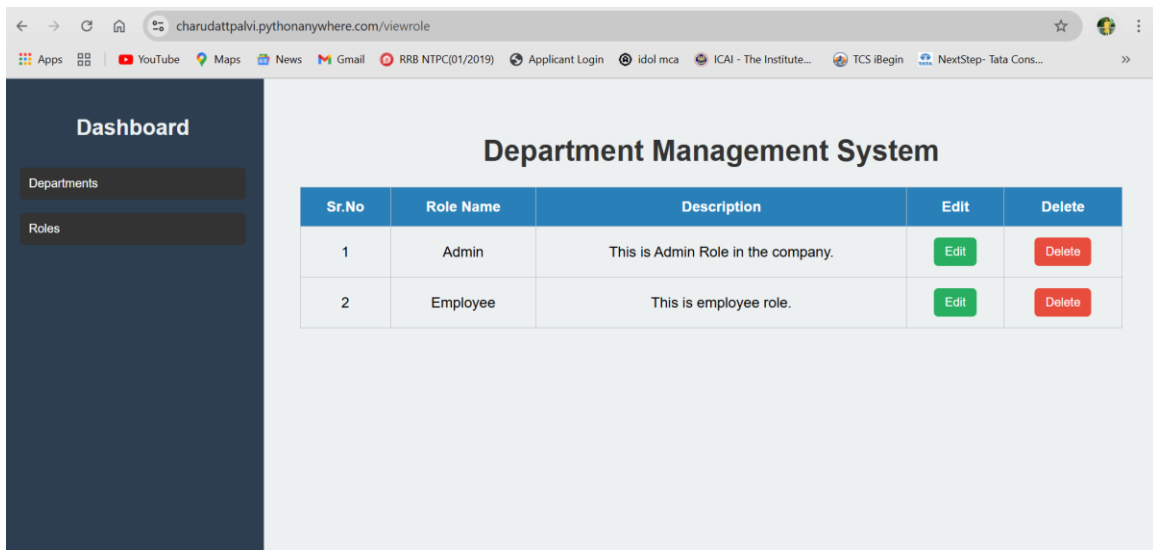
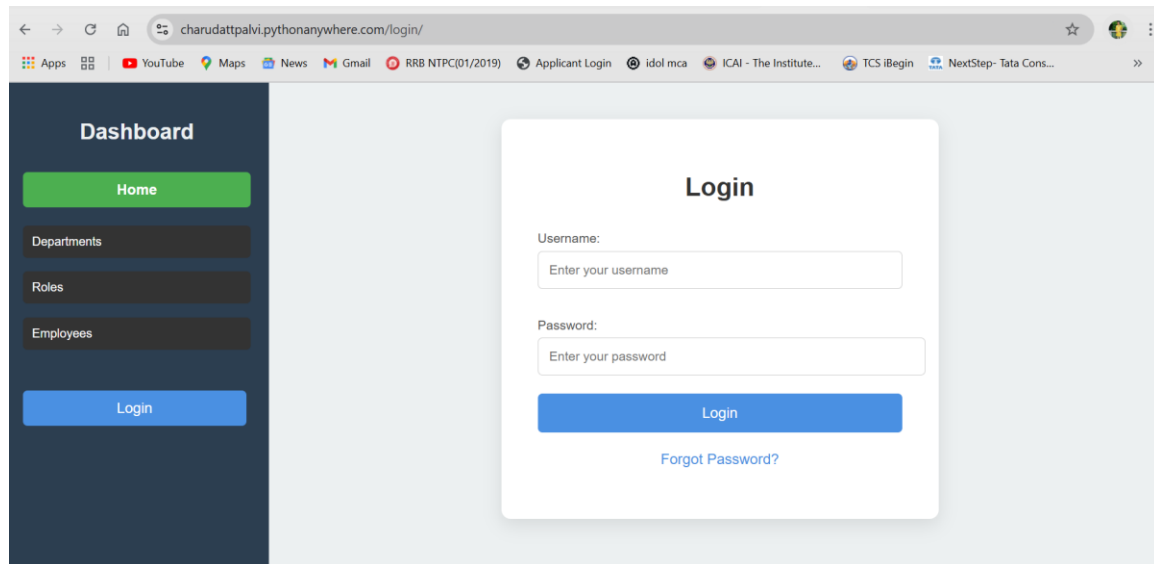## 5. Features and Instructions of Employee:-

5.1 View Employees

The homepage displays a list of all active employees in a tabular format. To view employees:
1. Go to the homepage (`https://charudattpalvi.pythonanywhere.com/viewemployees` or `http://127.0.0.1:8000/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

3. Options to Edit or Delete a 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 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.

5.3 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.

5.4 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.

6. Features and Instructions of Login/Password Reset:-

6.1 Login User

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

1. Go to the homepage (`https://charudattpalvi.pythonanywhere.com/login` or `http://127.0.0.1:8000/login`).
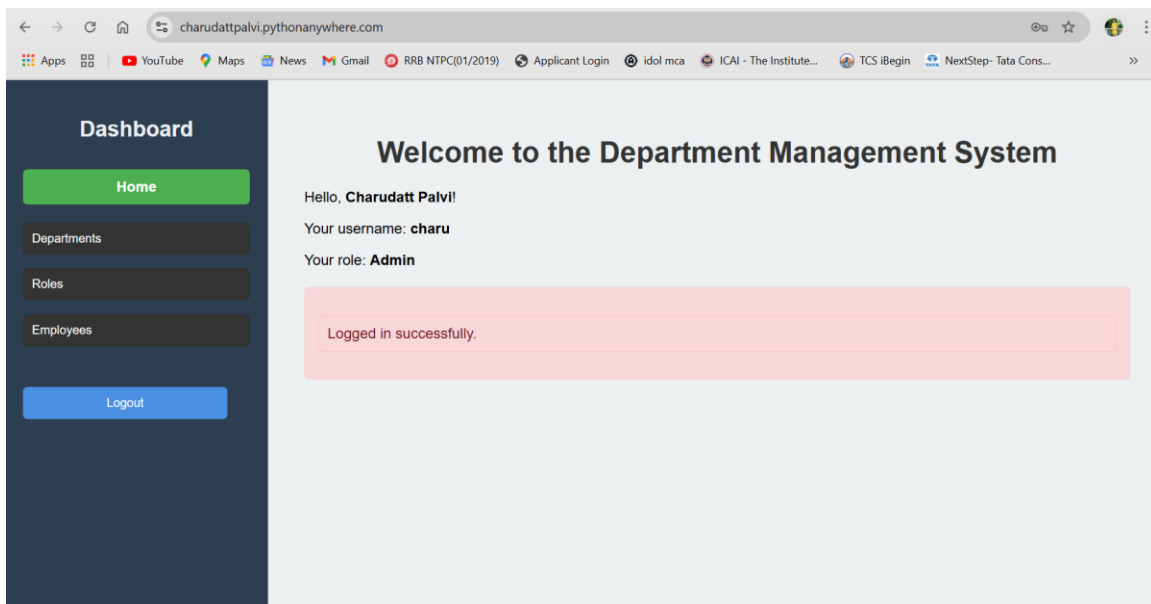

6.2 Reset Password Request

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://charudattpalvi.pythonanywhere.com/resetpasswordrequest` or `http://127.0.0.1:8000/resetpasswordrequest`).

6.3 Validate OTP Request

The Validate OTP Request displays a email and OTP confirmation form . To view Validate OTP form:
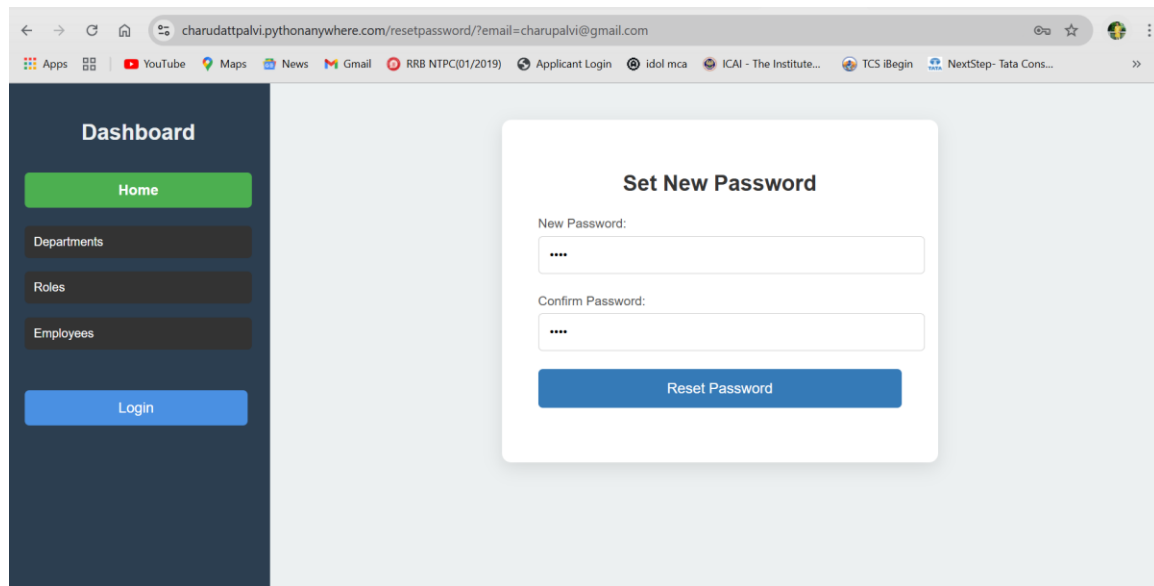
1. Go to the homepage (`https://charudattpalvi.pythonanywhere.com/validateotp` or `http://127.0.0.1:8000/validateotp `).

6.4 Set New Password

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

6.5 Login Page with password reset message

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

1. Go to the homepage (`https://charudattpalvi.pythonanywhere.com/login` or `http://127.0.0.1:8000/login`).

6.6 Home Page after login success

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

1. Go to the homepage (`https://charudattpalvi.pythonanywhere.com/` or `http://127.0.0.1:8000/`).

7. Features and Instructions of Task Management:-

7.1 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://charudattpalvi.pythonanywhere.com/viewtasks` or `http://127.0.0.1:8000/viewtasks `).

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.

7.2 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.

7.3 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.

7.4 View Task Details

To view a task details:

1. Navigate to the 'See Details' page by clicking on **'See Details** in the task list.
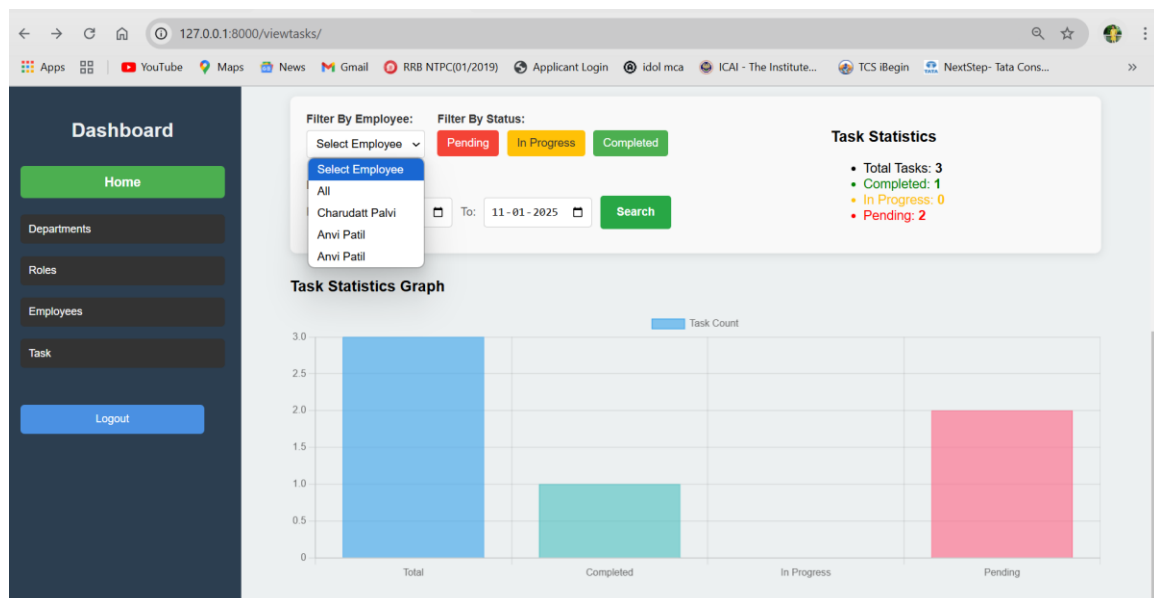
The task detail displays the details of tasks.
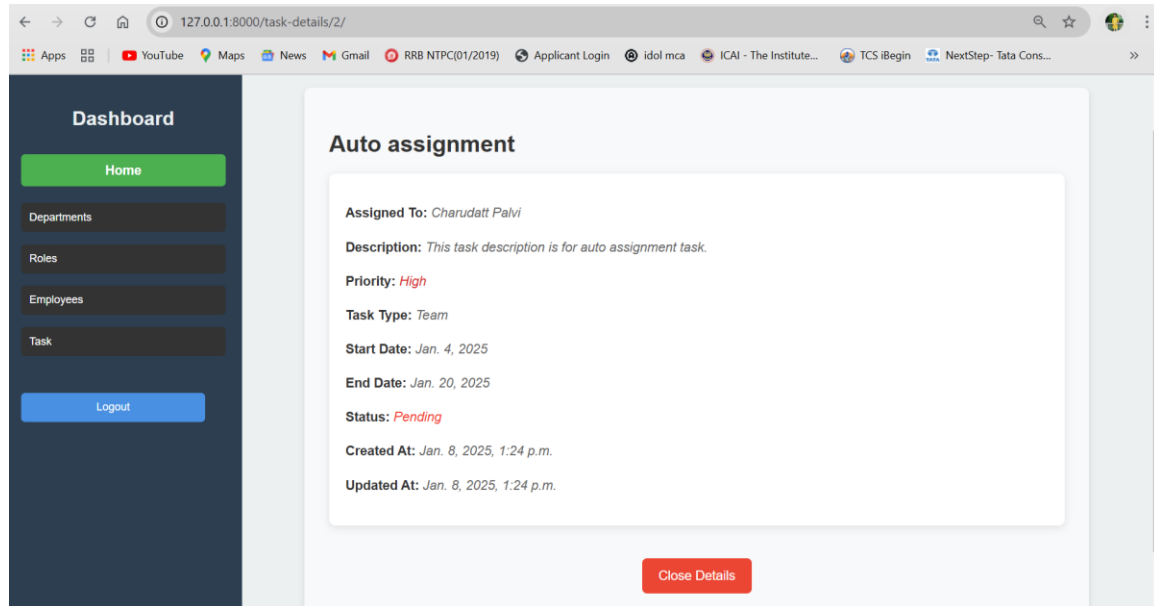
7.5 Filter Task

To filter a tasks:

1. Select filtration which you require from the filter options.
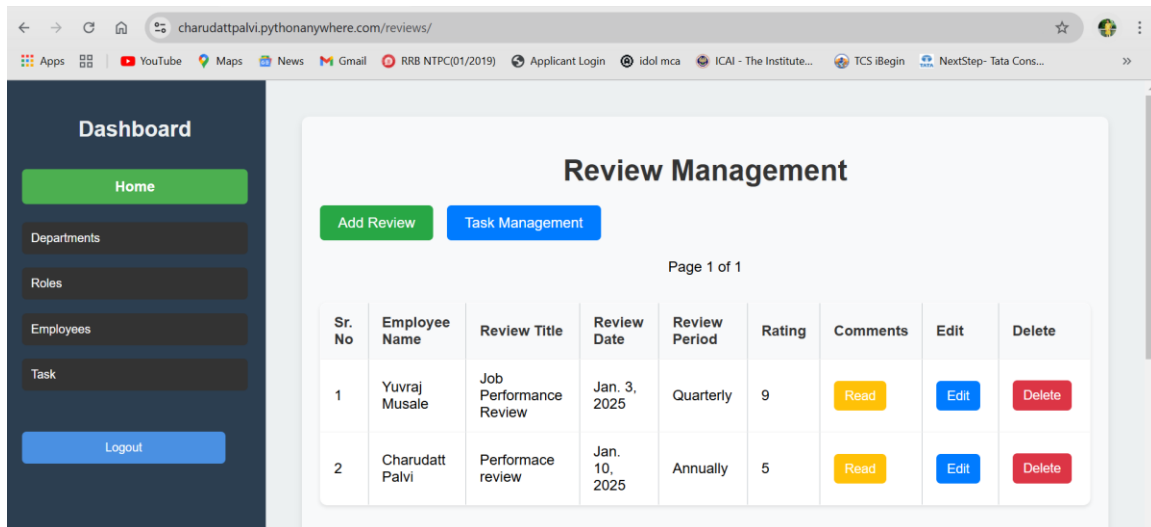
The task detail displays the details of tasks.

8. Features and Instructions of Performance Review:-

8.1 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://charudattpalvi.pythonanywhere.com/reviews` or `http://127.0.0.1:8000/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.

8.2 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.

8.3 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.

8.4 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.
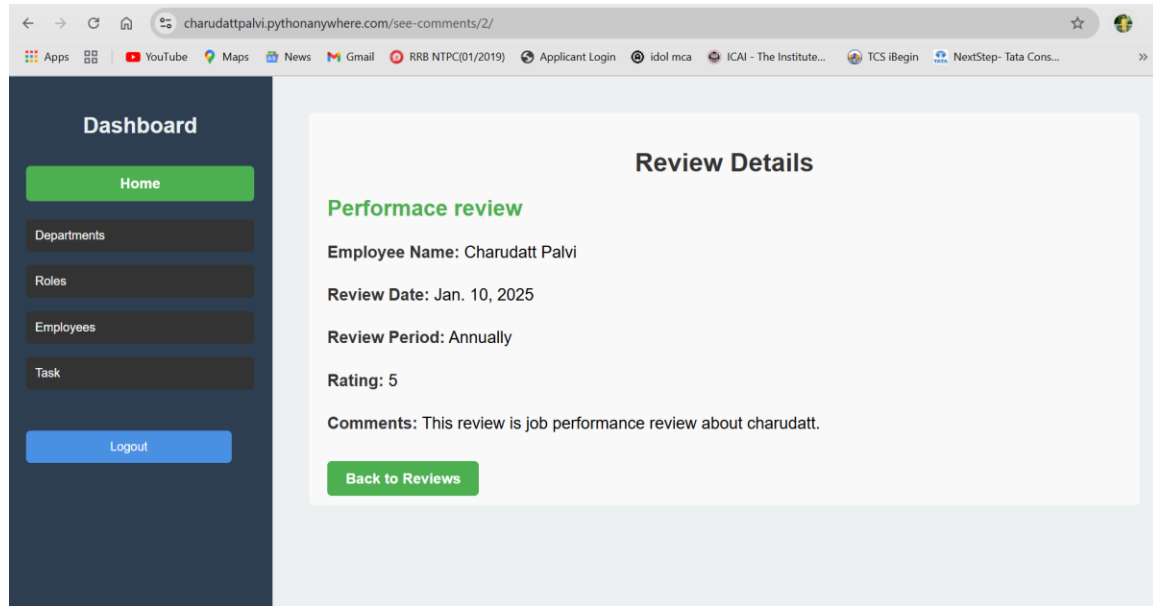
8.5 Filter Reviews

To filter a reviews:

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

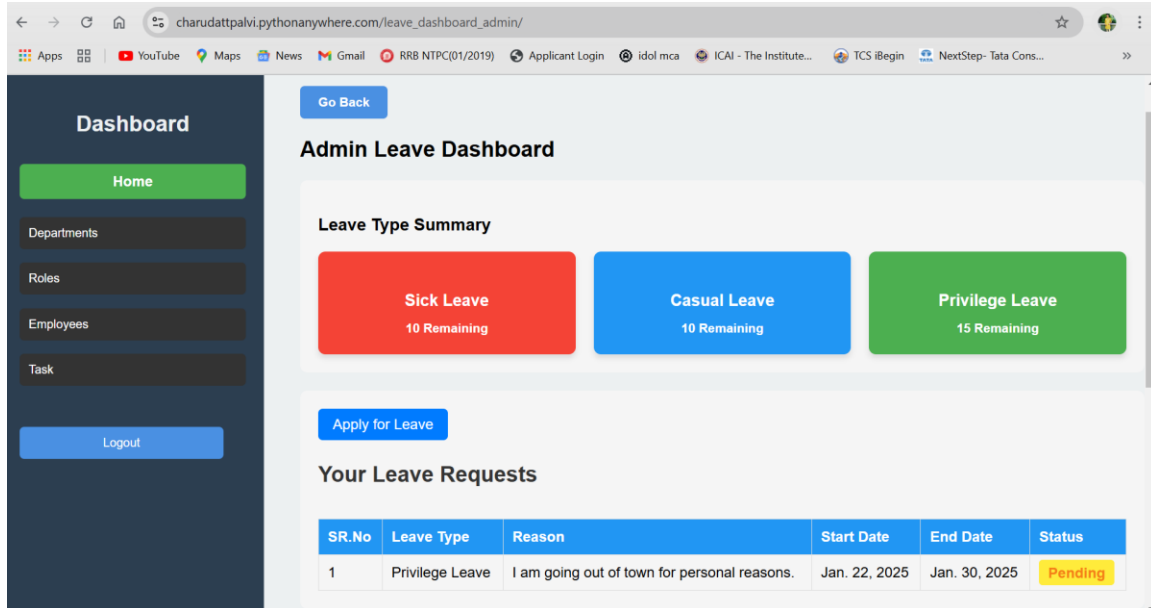The review list displays the details of review.
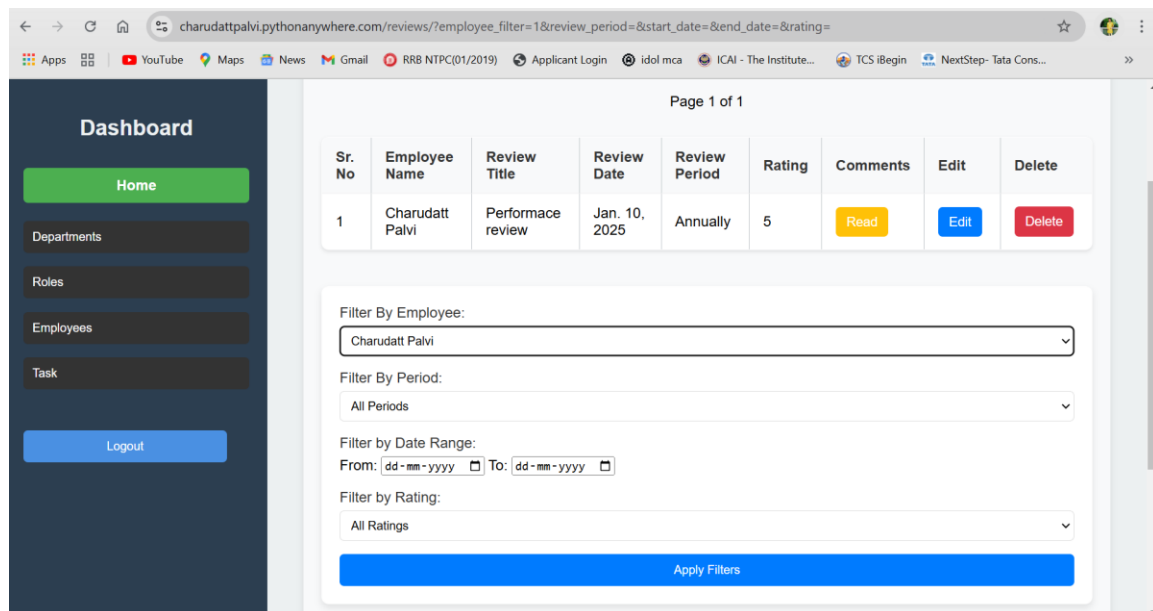
9. Features and Instructions of Leave Management:-

9.1 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://charudattpalvi.pythonanywhere.com/leave_dashboard_admin` or `http://127.0.0.1:8000/leave_dashboard_admin`).

9.2 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.

9.3 View Applied Leaves of Employee

To view applied leaves of employee:

9.4 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.

9.5 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.

9.6 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.

9.7 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://charudattpalvi.pythonanywhere.com/leave_dashboard_employee` or `http://127.0.0.1:8000/leave_dashboard_employee `).

2. 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.

9.8 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.

9.9 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.

10. 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.

11. Notes

- This system uses a soft delete mechanism, meaning deleted departments or roles can be restored manually from the database.
- For security, ensure CSRF tokens are included in all form submissions.
- Static files (CSS, JS) must be served correctly for a smooth user interface.