

# 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

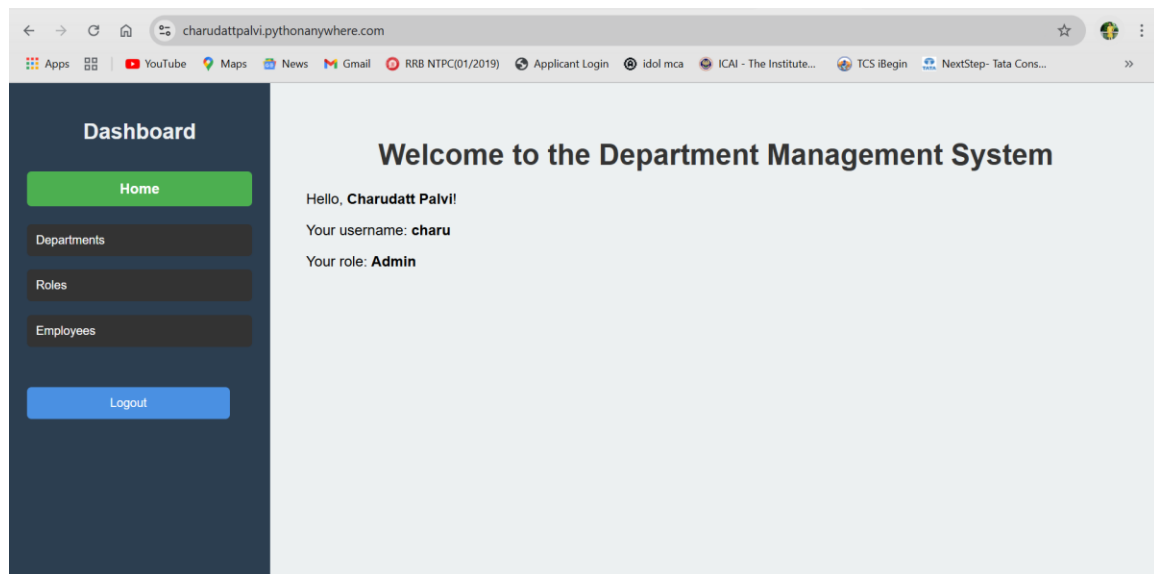
The system is hosted locally or on a server. To access it, follow these steps:

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.

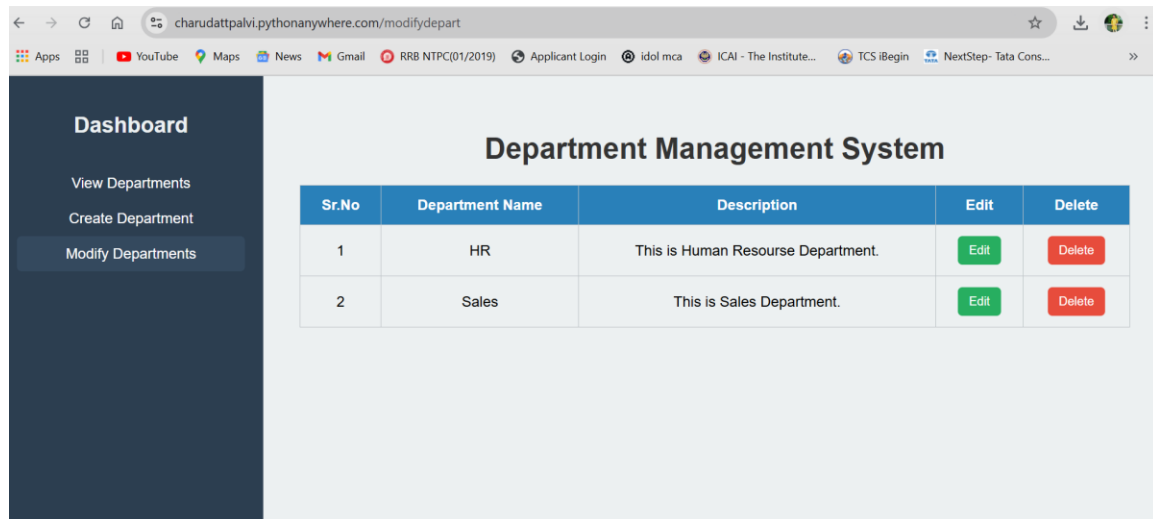


### 3. Features and Instructions of Department:-

#### 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.



Sr.No	Department Name	Description	Edit	Delete
1	HR	This is Human Resource Department.	Edit	Delete
2	Sales	This is Sales Department.	Edit	Delete

#### 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.

The screenshot shows a web browser window with the URL `charudattpalvi.pythonanywhere.com/adddepart`. On the left is a dark blue sidebar with the title "Dashboard" and three menu items: "View Departments", "Create Department" (which is highlighted), and "Modify Departments". The main content area is light gray and features a white box with a blue border titled "Create Department". Inside this box, there are two input fields: "Department Name:" and "Department Description:". Below these fields is a blue button labeled "Create". The browser's address bar and tabs are visible at the top.

### 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.

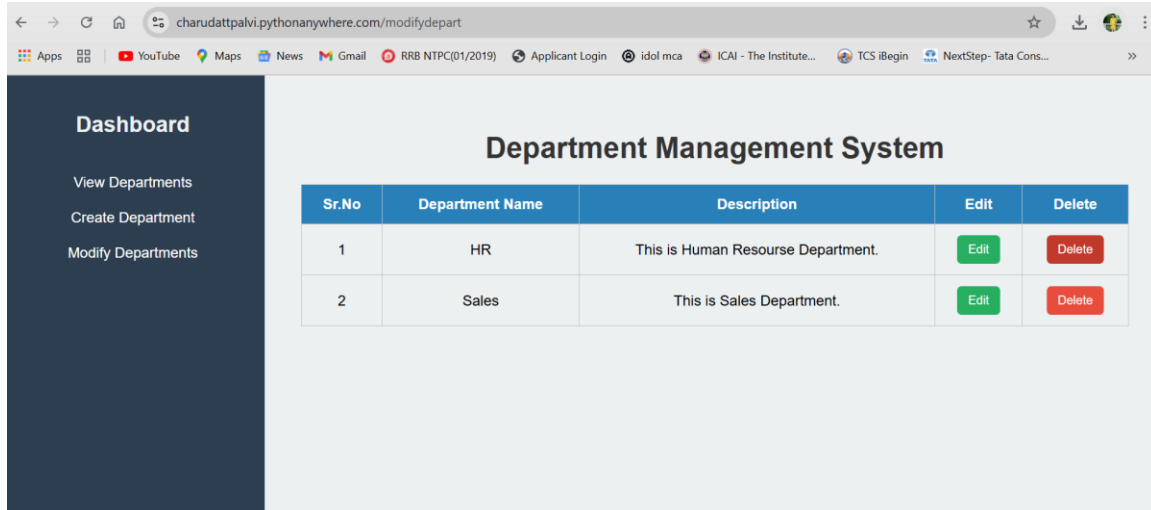
The screenshot shows a web browser window with the URL `charudattpalvi.pythonanywhere.com/update/1`. The sidebar on the left is identical to the previous screenshot, with "Create Department" highlighted. The main content area features a white box with a blue border titled "Update Department". It contains two input fields: "Department Name:" with the text "HR" entered, and "Department Description:" with the text "This is Human Resourse Department." entered. Below these fields is a blue button labeled "Update". The browser's address bar and tabs are visible at the top.

### 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 a web browser at the URL `charudattpalvi.pythonanywhere.com/modifydepart`. The page has a dark blue sidebar with the title "Dashboard" and four menu items: "View Departments", "Create Department", "Modify Departments", and "Delete Department". The main content area is titled "Department Management System" and contains a table with the following data:

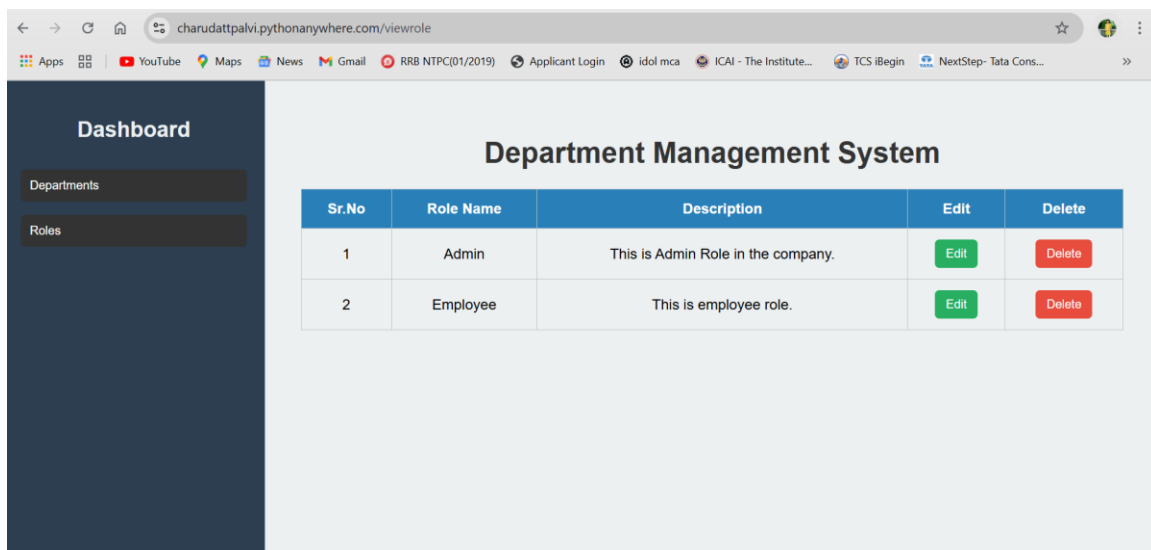
Sr.No	Department Name	Description	Edit	Delete
1	HR	This is Human Resource Department.	<button>Edit</button>	<button>Delete</button>
2	Sales	This is Sales Department.	<button>Edit</button>	<button>Delete</button>

## 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.



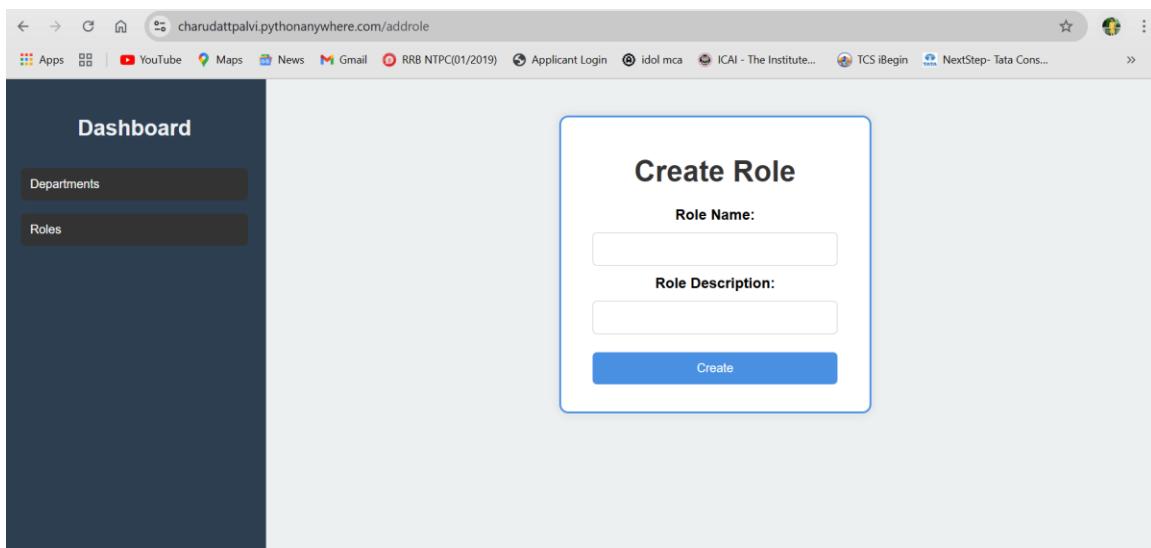
The screenshot shows a web browser at the URL `charudattpalvi.pythonanywhere.com/viewrole`. The page has a dark blue sidebar with the title "Dashboard" and two menu items: "Departments" and "Roles". The main content area is titled "Department Management System" and contains a table with the following data:

Sr.No	Role Name	Description	Edit	Delete
1	Admin	This is Admin Role in the company.	<button>Edit</button>	<button>Delete</button>
2	Employee	This is employee role.	<button>Edit</button>	<button>Delete</button>

#### 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.

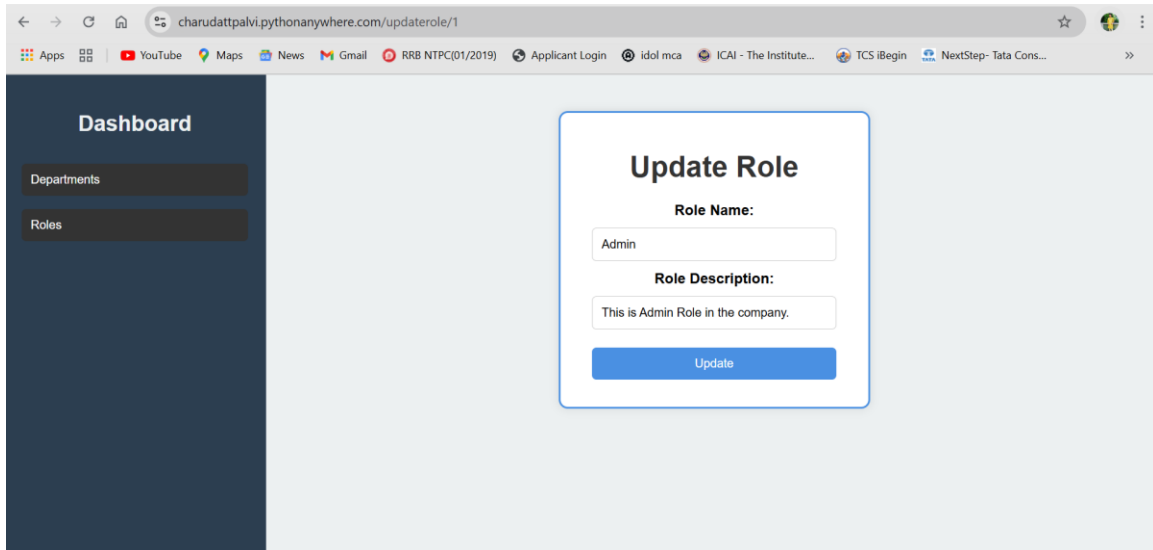


The screenshot shows a web browser window with the URL `charudattpalvi.pythonanywhere.com/addrole`. The browser's address bar and tabs are visible at the top. On the left, there is a dark blue sidebar with the word 'Dashboard' at the top. Below it, there are two buttons: 'Departments' and 'Roles'. The 'Roles' button is highlighted. The main content area is light gray and contains a white box with a blue border titled 'Create Role'. Inside this box, there are two input fields: 'Role Name:' and 'Role Description:'. Below these fields is a blue button labeled 'Create'.

#### 4.3 Edit/Update a Role

To update a role's details:

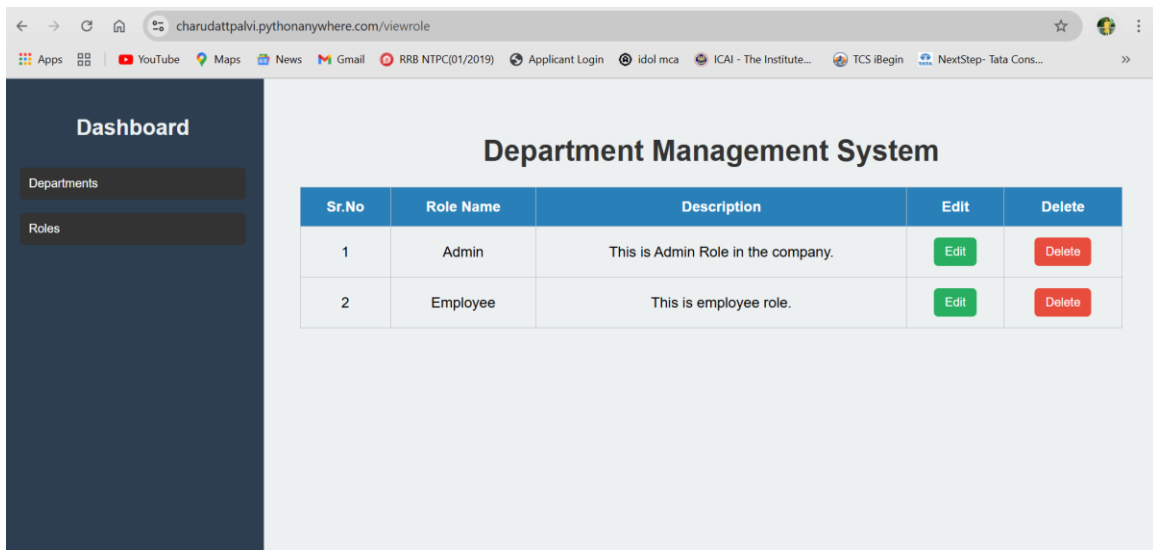
1. On the homepage, locate the role you want to update.
2. Click on the **'Edit'** button in the corresponding row.
3. Modify the fields in the form:
  - Role Name
  - Role Description
4. Click on the **'Update'** button to save the changes.
5. The updated details will be reflected in the list.



#### 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.



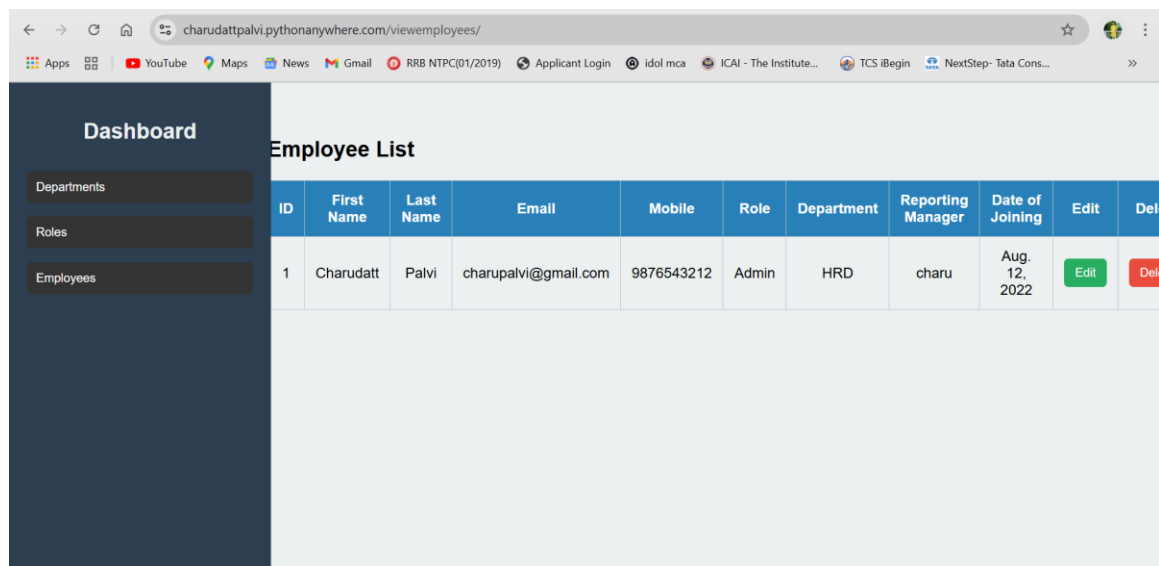
## 5. Features and Instructions of Employee:-

### 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.



ID	First Name	Last Name	Email	Mobile	Role	Department	Reporting Manager	Date of Joining	Edit	Delete
1	Charudatt	Palvi	charupalvi@gmail.com	9876543212	Admin	HRD	charu	Aug. 12, 2022	Edit	Delete

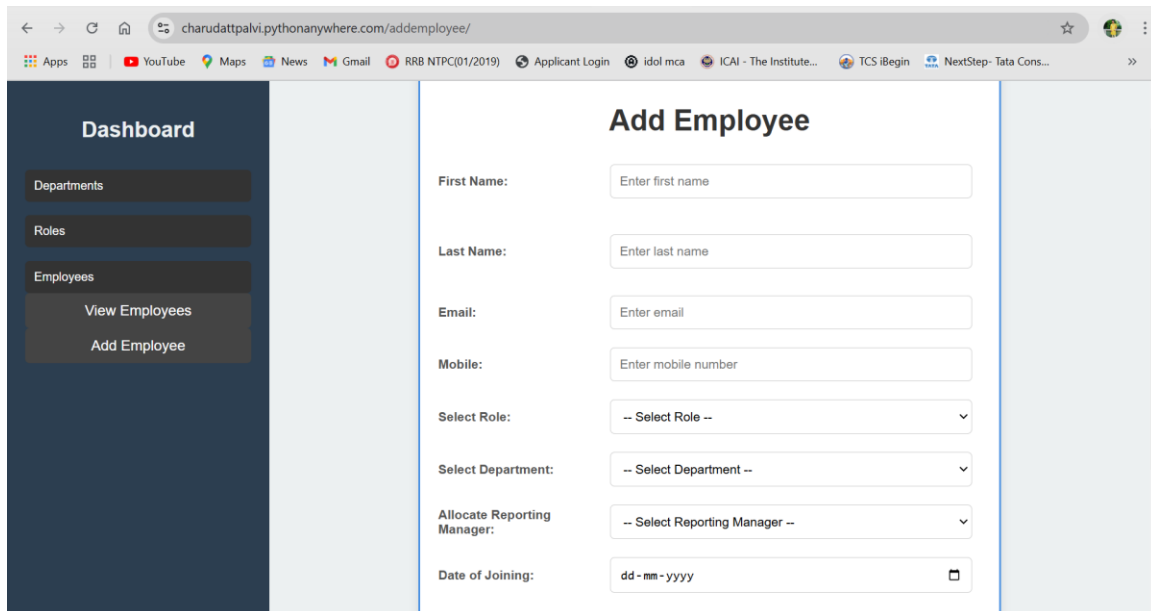
### 5.2 Add a New Employee

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.



The screenshot shows a web browser window with the URL `charudattpalvi.pythonanywhere.com/addemployee/`. The page has a dark blue sidebar on the left with the following menu items: Dashboard, Departments, Roles, Employees, View Employees, and Add Employee. The main content area is titled 'Add Employee' and contains the following form fields:

- First Name:
- Last Name:
- Email:
- Mobile:
- Select Role:
- Select Department:
- Allocate Reporting Manager:
- Date of Joining:

### 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.

**Update Employee**

First Name:

Last Name:

Email:

Mobile:

Select Role:

Select Department:

Allocate Reporting Manager:

## 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.

**Employee List**

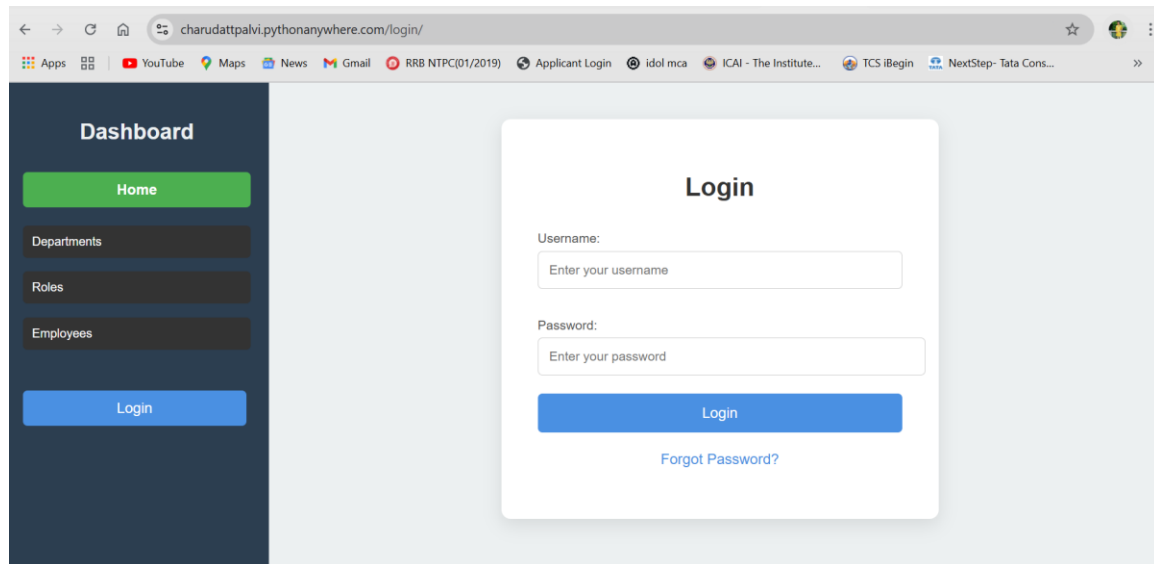
First Name	Last Name	Email	Mobile	Role	Department	Reporting Manager	Date of Joining	Edit	Delete
Charudatt	Palvi	charupalvi@gmail.com	9876543212	Admin	HRD	charu	Aug. 12, 2022	<a href="#">Edit</a>	<a href="#">Delete</a>

## 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`).



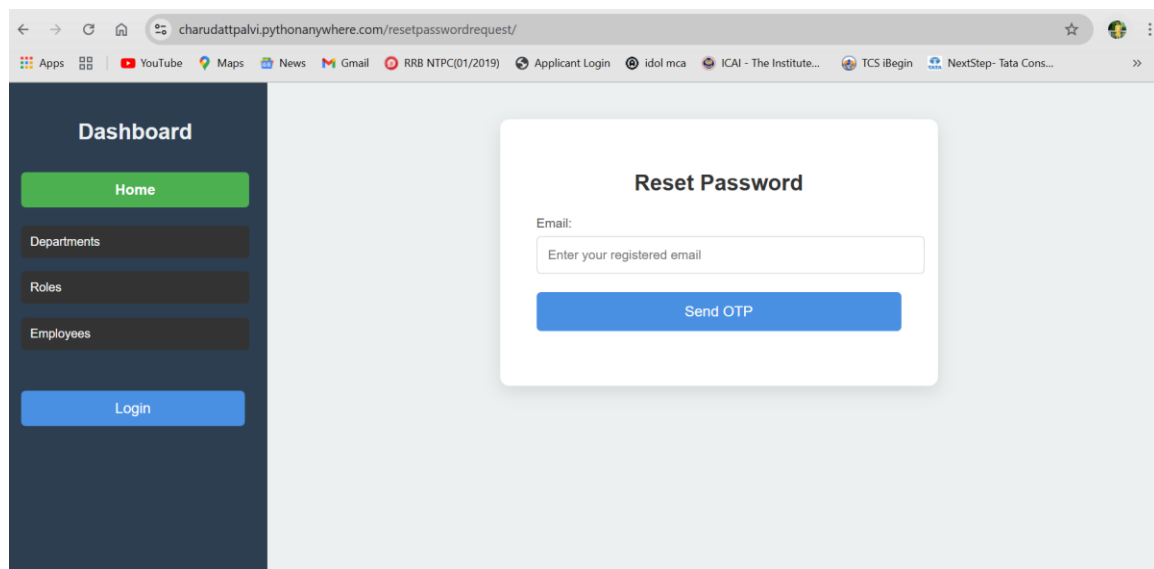
The screenshot shows a web browser at the URL `charudattpalvi.pythonanywhere.com/login/`. On the left is a dark blue sidebar with the title "Dashboard" and a "Home" button. Below it are links for "Departments", "Roles", and "Employees", and a "Login" button at the bottom. The main content area is light gray and features a white "Login" form. The form has two input fields: "Username:" with the placeholder "Enter your username" and "Password:" with the placeholder "Enter your password". Below these fields is a blue "Login" button and a blue link for "Forgot Password?".

### 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``).

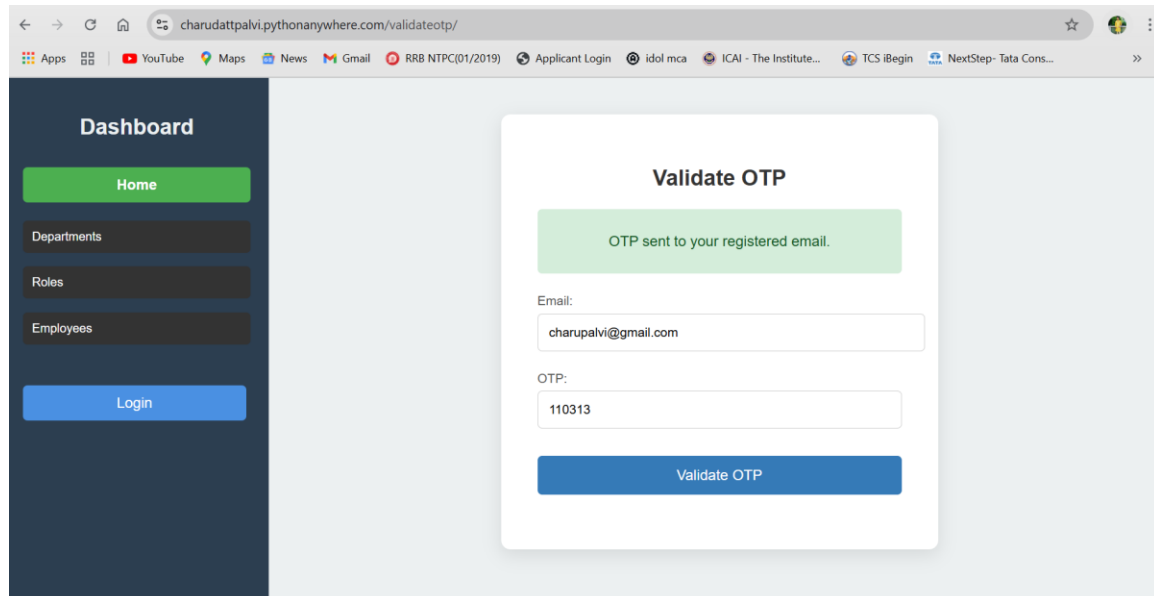


The screenshot shows a web browser at the URL `charudattpalvi.pythonanywhere.com/resetpasswordrequest/`. The sidebar is identical to the previous screenshot. The main content area features a white "Reset Password" form. It has a single input field labeled "Email:" with the placeholder "Enter your registered email". Below the input field is a blue "Send OTP" button.

### 6.3 Validate OTP Request

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

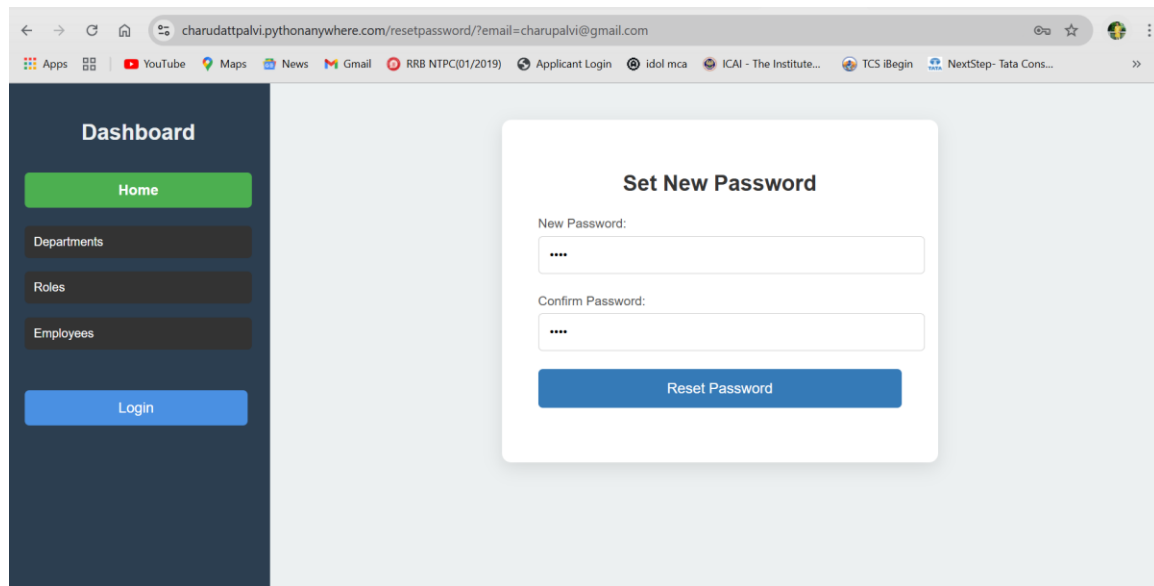
1. Go to the homepage (`https://charudattpalvi.pythonanywhere.com/validateotp` or `http://127.0.0.1:8000/validateotp`).



The screenshot shows a web browser window with the URL `charudattpalvi.pythonanywhere.com/validateotp/`. On the left is a dark blue sidebar with the title "Dashboard" and a "Home" button. Below it are links for "Departments", "Roles", and "Employees", and a "Login" button at the bottom. The main content area is light gray and contains a white card titled "Validate OTP". Inside the card, a green message box says "OTP sent to your registered email." Below this, there are two input fields: "Email:" with the value `charupalvi@gmail.com` and "OTP:" with the value `110313`. At the bottom of the card is a blue button labeled "Validate OTP".

### 6.4 Set New Password

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

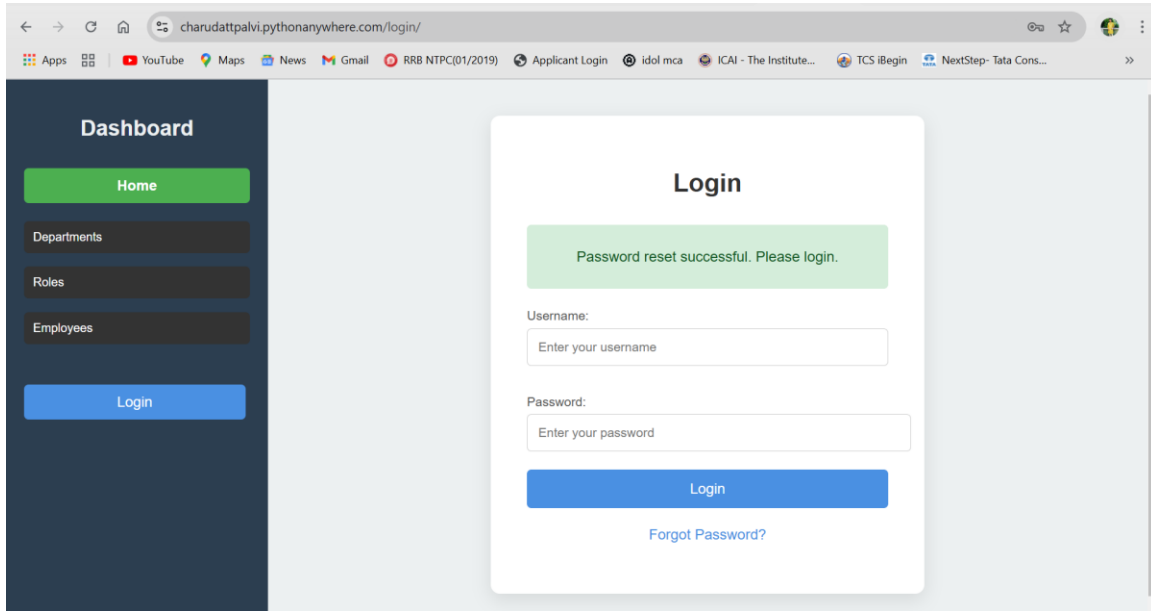


The screenshot shows a web browser window with the URL `charudattpalvi.pythonanywhere.com/resetpassword/?email=charupalvi@gmail.com`. The sidebar is identical to the previous screenshot. The main content area contains a white card titled "Set New Password". Inside the card, there are two input fields: "New Password:" and "Confirm Password:", both containing four dots to represent masked text. At the bottom of the card is a blue button labeled "Reset Password".

### 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`).

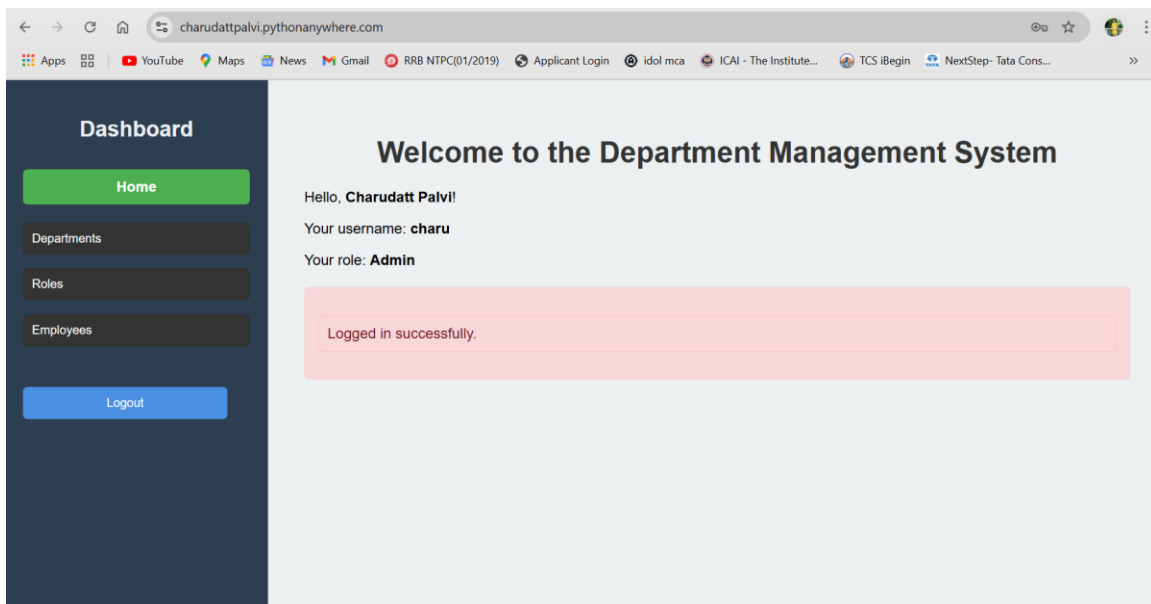


The screenshot shows a web browser at the URL `charudattpalvi.pythonanywhere.com/login/`. On the left is a dark blue sidebar with the title "Dashboard" and a "Home" button. Below it are buttons for "Departments", "Roles", and "Employees", and a "Login" button at the bottom. The main content area is light gray and features a white "Login" form. At the top of the form is a green message box that says "Password reset successful. Please login." Below this are input fields for "Username:" (with placeholder "Enter your username") and "Password:" (with placeholder "Enter your password"). A blue "Login" button is at the bottom of the form, with a link "Forgot Password?" below it.

### 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/`).



The screenshot shows the homepage of the "Department Management System" at the URL `charudattpalvi.pythonanywhere.com`. The left sidebar is the same as in the previous screenshot, but the "Login" button is replaced by a "Logout" button. The main content area is light gray and displays a welcome message: "Welcome to the Department Management System". Below this, it says "Hello, Charudatt Palvi!" and "Your username: charu". Underneath, it states "Your role: Admin". A pink message box at the bottom of the main area says "Logged in successfully."

## 7. Features and Instructions of Task Management:-

### 7.1 View Task Management

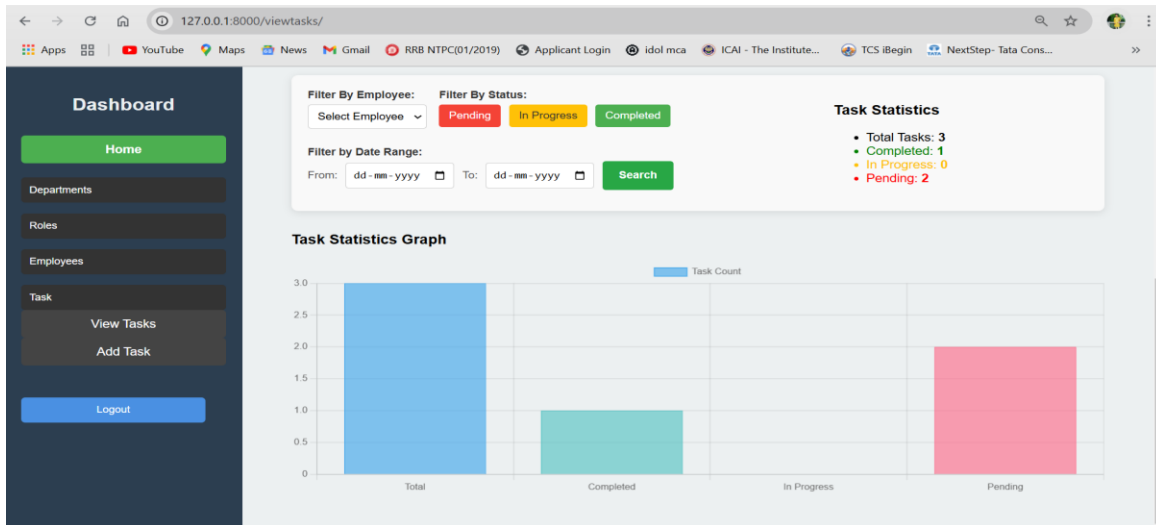
The homepage displays a list of all active Task management in a tabular format. To view Tasks:

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.

The screenshot shows a web browser at the URL 127.0.0.1:8000/viewtasks/. The page has a dark blue sidebar on the left with a 'Dashboard' section containing links for Home, Departments, Roles, Employees, Task, View Tasks, Add Task, and Logout. The main content area is titled 'Task Management' and features three buttons: 'Create Task' (blue), 'Leave Management' (green), and 'Performance Review' (yellow). Below these buttons, it says 'Page 1 of 1'. A table displays the following data:

Sr. No	Employee Name	Task Title	Start Date	End Date	See Details	Status	Action	Edit	Delete
1	Charudatt Palvi	Auto assignment	Jan. 4, 2025	Jan. 20, 2025	See Details	Pending	Mark Completed	Edit	Delete
2	Anvi Patil	Project Analysis	Jan. 8, 2025	Jan. 11, 2025	See Details	Completed	Completed	Edit	Delete
3	Anvi Patil	Project Testing	Dec. 20, 2024	Dec. 28, 2024	See Details	Pending	Mark Completed	Edit	Delete

Below the table, there are filter options: 'Filter By Employee:' with a dropdown menu, 'Filter By Status:' with buttons for Pending, In Progress, and Completed, and 'Filter by Date Range:' with 'From' and 'To' date pickers and a Search button. On the right, a 'Task Statistics' section shows: Total Tasks: 3, Completed: 1, In Progress: 0, and Pending: 2.



## 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.

The screenshot shows the 'Add Task' form. The sidebar is the same as in the previous screenshot. The main content area has a header 'Add Task'. The form fields are: 'Task Title' (text input), 'Description' (text area), 'Priority' (dropdown menu with '-- Select Priority --'), 'Task Type' (dropdown menu with '-- Select Task Type --'), 'Start Date' (date input with a calendar icon), 'End Date' (date input with a calendar icon), and 'Assign To' (dropdown menu with '-- Select Employee --'). At the bottom of the form is a blue '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.

The screenshot shows a web browser window with the URL `127.0.0.1:8000/edit_task/2/`. The browser's address bar and tabs are visible at the top. The page has a dark blue sidebar on the left with the title 'Dashboard' and a 'Logout' button. The main content area is titled 'Edit Task' and contains a form with the following fields:

- Task Title:** A text input field containing 'Auto assignment'.
- Description:** A text area containing 'This task description is for auto assignment task.'
- Priority:** A dropdown menu with 'High' selected.
- Task Type:** A dropdown menu with 'Team' selected.
- Start Date:** A date input field with the placeholder 'dd-mm-yyyy' and a calendar icon.
- End Date:** A date input field with the placeholder 'dd-mm-yyyy' and a calendar icon.
- Status:** A dropdown menu with 'Pending' selected.
- Assign To:** A dropdown menu with 'Charudatt Palvi' selected.

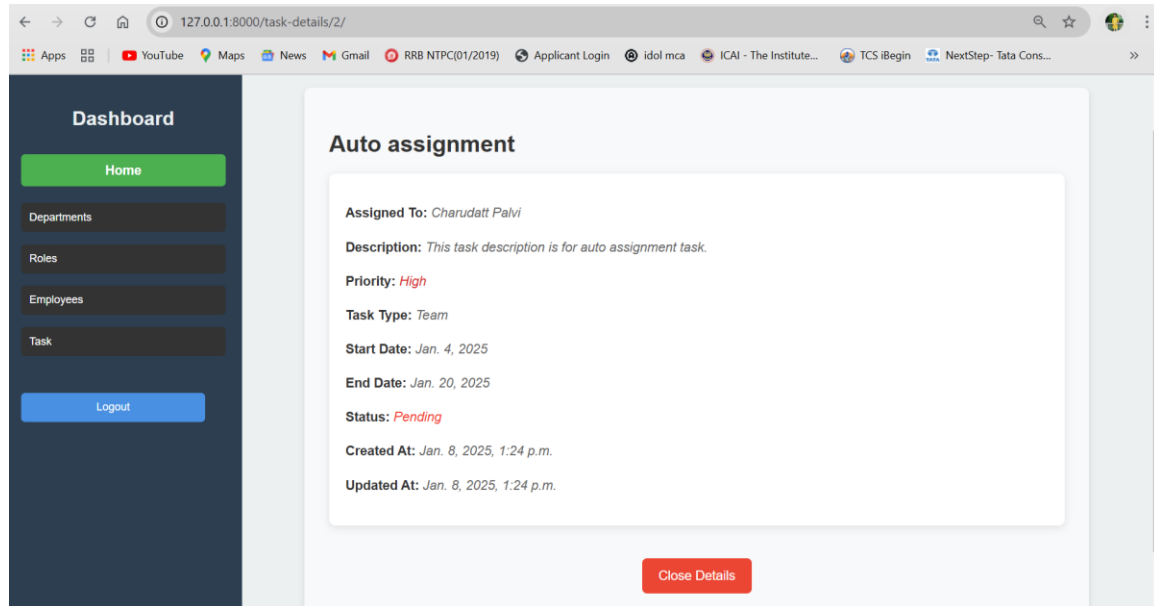
At the bottom of the form is a blue button labeled 'Update Task'.

## 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.

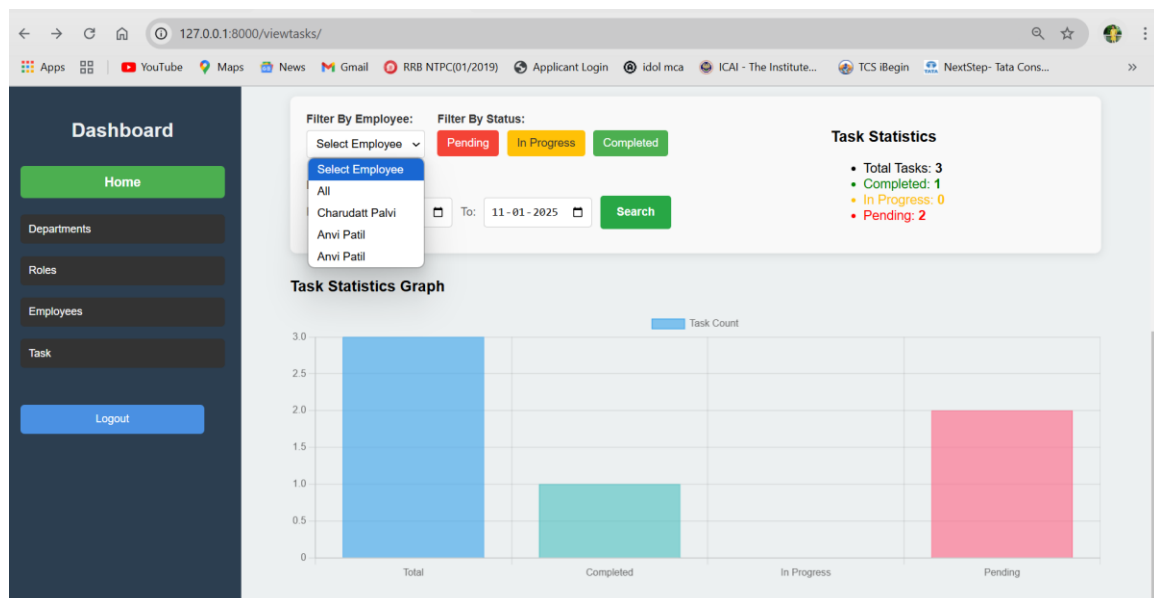


## 7.5 Filter Task

To filter a tasks:

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

The task detail displays the details of tasks.





## 8. 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.

## 9. 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.