**Production Tracker Project**

**General Purpose of the application:**

* Managers will be submitting employee’s production hours daily.
* Managers/Directors can view historical production hours.
* Managers/Directors can produce reports on demand.
* Admin of the application plays vital role to facilitate the application to users

**Sites for the application:**

* A user interface for all users and activities.

**User groups/Roles:**

* **Admin** (Full CRUD right)
  + Will have a configuration page - to configure table column (add, edit, remove)
  + Will have a view of timesheet of all users of all teams
  + Can submit records
  + Can edit any previous days submission at any instance
* **Managers** (Create = yes, Update = limited)
  + Only sees the employees report to him/her
  + Can only submit records for employees report to him/her
  + Can only only update previous records for employees who report to him/her but for any submissions within the last 2 working days. ()

**Brief Usage of the application based on groups/role:**

* **Admin** users can log in
* **Admin** user can configure the table - add/update/remove new columns (campaign names, productive activities), add colour to the text, can edit the total hours threshold etc
* **Admin** users can add records
* **Admin** users can view and edit from all past submitted records
* **Admin** users can log out
* **Manager** users can log in
* **Manager** users can add records
* **Manager** users can view all past submitted records
* **Manager** users can only update any submissions made within the last 2 working days.
* **Manager** users can log out.

**User Authentication:**

* Use Windows ***Active directory*** for user authentication
* Application will ***only*** be accessed by Admin and Managers group users in the Active Directory
* Any log in session will expire within 24 hours.

**Number of Pages for the application/tool:**

* Login page
* A landing hubpage - Which will have 3 or 4 buttons on the centre of the page: Submit Today’s Records, View Past Records and Generate Report.
* Data Submission page
* Past records page
* An admin configuration page

**Login Page:**

* A login form with username and password fields
* A ‘Login’ button
* Invalid login should provide a generic prompt, e.g. ***“Sorry, please try again with a valid credential.”***
* No forgot username or password option. No Register option.

**Landing Hubpage:**

4 large buttons:

* Submit Today’s Records
* View Past Records
* Generate Report
* Admin page (based on discussion)

**Submit Today’s Record Page: (Please see the screenshot below as an example):**

* It is a web page with a grid web-form (e.g. Table web form)
* The ‘**#**’, ’**Advisor Name**’, ‘**Sales Manager**’, ‘**Production Notes**’ and ‘**Total Hours**’ columns are fixed core columns and **are not** configurable **but** the rest are categorised in ‘Production’ and ‘Non-Production’ categories. These categories and its sub-categories (columns titles under them) will be configurable via Admin’s Config page.
* ‘**Advisor Name**’, ‘**Sales Manager**’ columns will be automatically pre-populated which will be obtained from the Database table of “Agents” which will have the list of agents names and their reporting managers.
* ‘**#**’ will be the serial number based on the populated ‘**Advisor Name**’, ‘**Sales Manager**’ columns
* ‘**Production Notes**’ will be a text field (can be left blank by user, not a mandatory field) and is empty when navigated to this page
* Rest of all the fields will only accept digits (bear in mind 3, 3.00, 3.5, 3.50 and 4.75 type should be accepted. Negative number, text, special characters should not be accepted). These fields are empty when navigated to this page.
* A ‘**Submit**’ button to submit records
  + Should be able to submit all records in one go
  + Should be able to submit selected rows. (so, rows need to have a checkbox individually. User should be able select individually one by one and also can select all with one button click)
* When filling up data (hours), if the total hours is less than the threshold, the ‘Total Hours’ field will be highlighted in Red and the submit/update button will be disabled. (e.g. If the production hour threshold is 8 hours a day and if an agent works 7 hours, it will be highlighted in red since there is a discrepancy of 1 hour).
* Once submitted, today’s record will stay on this page with all submitted data being greyed out with ability to edit them.
* After submission, users will be able to find ***today's submitted data*** only in this page not on the View Past Records page.
* After date changes (at midnight), all these records will be displayed in the View Past Records page.

**View Past Records Page:**

* Upon landing to this page, the default view is always yesterday's record.
* Table will be the same as the table in Today’s Record Submit Page except all the data being greyed out (read-only).
* Edit button for data from the last 2 working days is available for the manager (but for Admin user Edit button should be present for all data).
* Users should be able to navigate to all past data with ‘Previous’ & ‘Next’ buttons and also via picking a date in the calendar.

**Admin’s Config page: (not sure if this needs to be in separate backend site or if this can be facilitated within same frontend site)**

A page which enables admin users to configure some basic frontend elements. This page will not be visible or accessible by users other than Admin users (not even typing manually via URL).

* Users can add columns in the table. These columns will be selected from a dropdown option where the information will be pulled from the database dynamically. (e.g. If you have a new field in the database table, in the config page users will see its availability in the dropdown and can select it - the field data type should be auto-selected).
* User should be able to remove or disable table columns
* User should be able to add styling (Font, Font-size, Italic/Bold/Normal & Colour) to the Text and cell box (e.g. columns header)
* Users should be able to configure the total production hours threshold for an agent based on which ‘Total Hours’ cell will be highlighted.
* Users should be able to configure the duration of eligibility to edit submitted data for managers. Default is 2 working days.
* Users should be able to configure the availability of report type. E.g. Users can switch on Excel and PDF but switch off CSV.

**Generate Report:**

Should be able to generate daily, weekly, monthly and Yearly reports in Excel, CSV and PDF format.

* Should bring up a modal
  + Modal should have a ‘From’ field - a calendar picker
  + Modal should have a ‘To’ field - a calendar picker
  + Modal should have a Format dropdown (with option PDF, Excel and CSV)
  + Modal should have a Download button - it will trigger the processing of the report and download file in specified format locally.
  + Modal should have a Close button - it will close the modal.
  + Apart from being able to generate a total report of the table on any date or date range, users also should be able to generate reports based on specific table columns. E.g. (few examples)
    - User need a daily ‘Sick’ report of all employees
    - User need a weekly ‘Sick’ report of all employees
    - User need a monthly ‘Sick’ report of all employees
    - User need a yearly ‘Scottish Power’ report of all employees

**Deliverables:**

* Complete Source code with github implementation (private project).
* Deployment process set up for the application to run in Azure VM.
* Delivered to the customer to be able to use functionally within 3-4 weeks of accepting the job.
* Support during the warranty period - e.g. defect fixes.