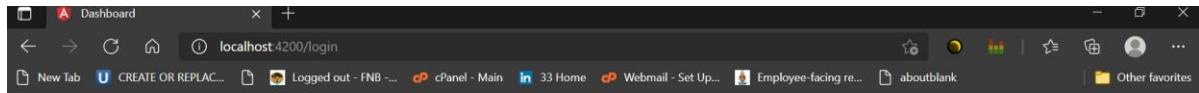**Site Manager User Manual**

1. Log in:

When first opening the link without first logging in, the system will default to the log in page, otherwise the default page.
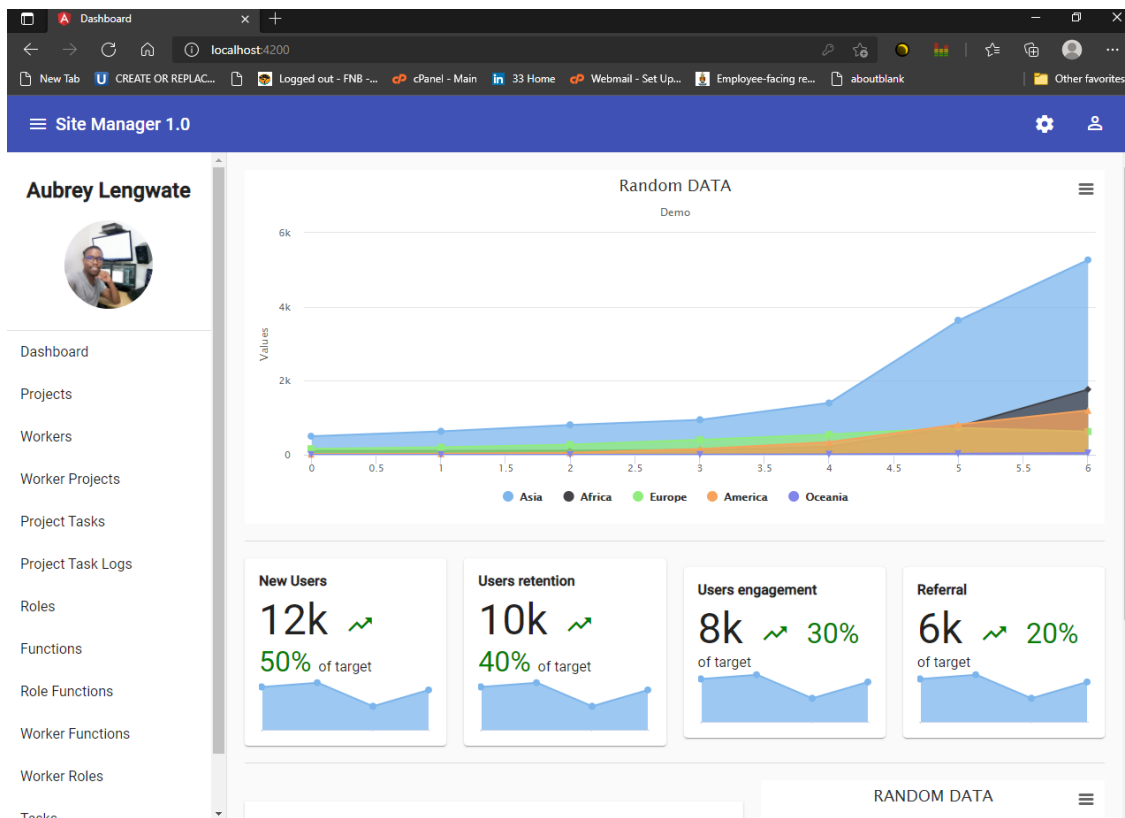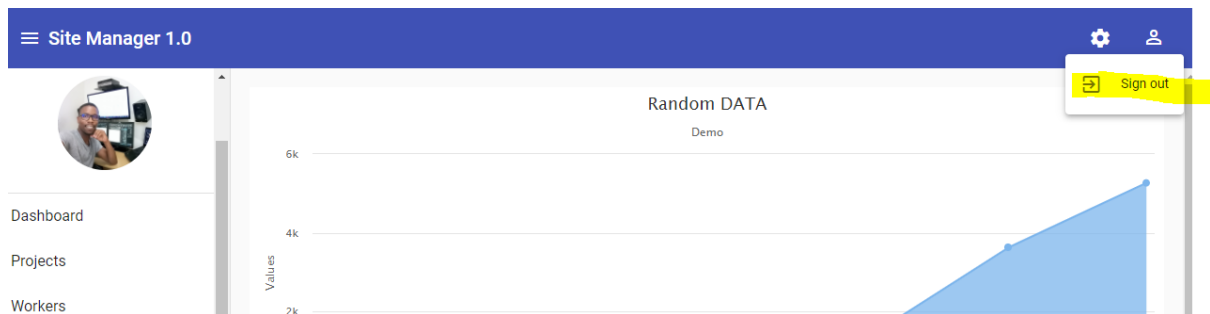

Input Username and Password and click "Sign In" to access the system.

You will be directed to the page below after successful log in where you will now be able to access the system pages.

2. Logout:

To Sign out use the link below:

3. Creating User/Worker

A worker is a person that will be using the system as an administrator, supervisor, project owner or anyone who may not be using the system like field workers. Username and password can be set up on this level and the worker can later be linked to roles and function ID for access control.

On the dashboard sidebar there will be links to functions that a user can perform, to create a new/edit a worker click on the "Worker" like on the sidebar menu:
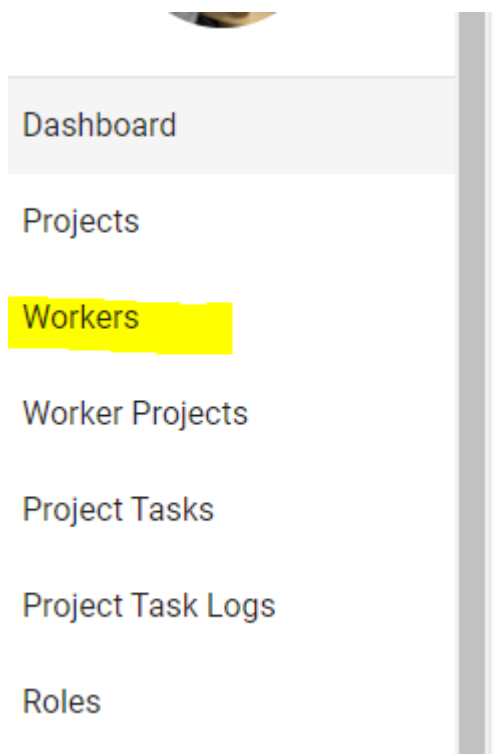
After clicking on the link the bellow screen will appear for capturing:
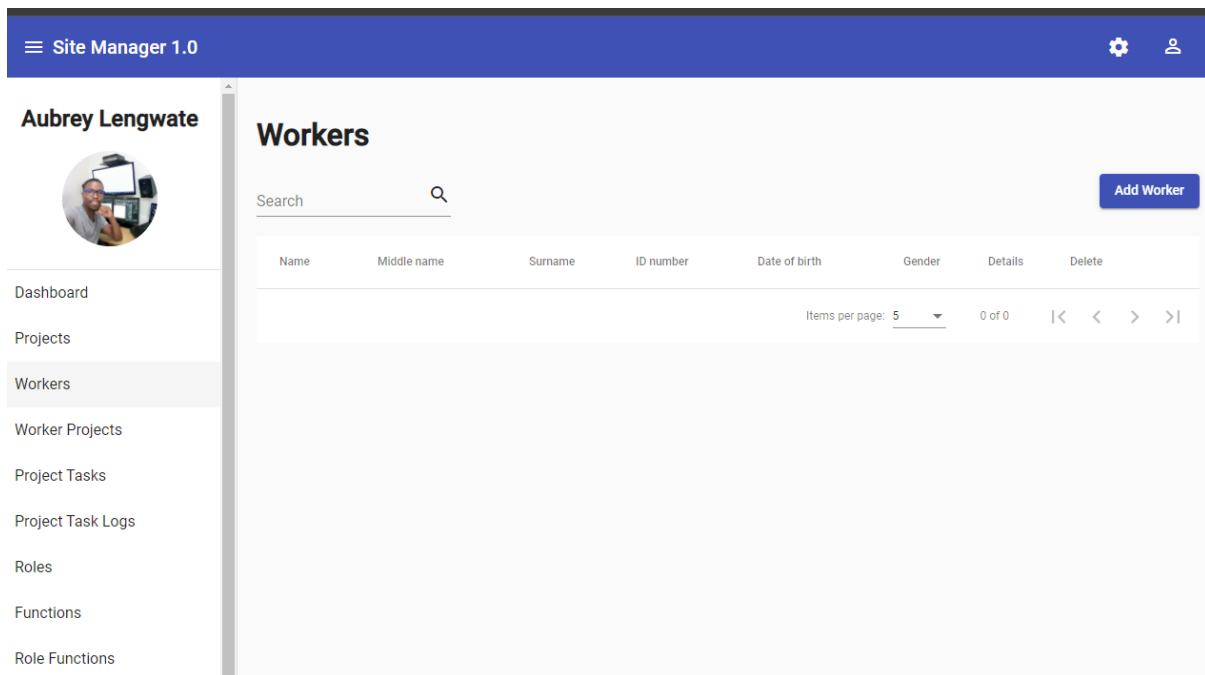
The fields are self-explanatory. On this screen you will not be able to capture new records or edit any record, it is only for viewing. Click on add worker to create a new record.
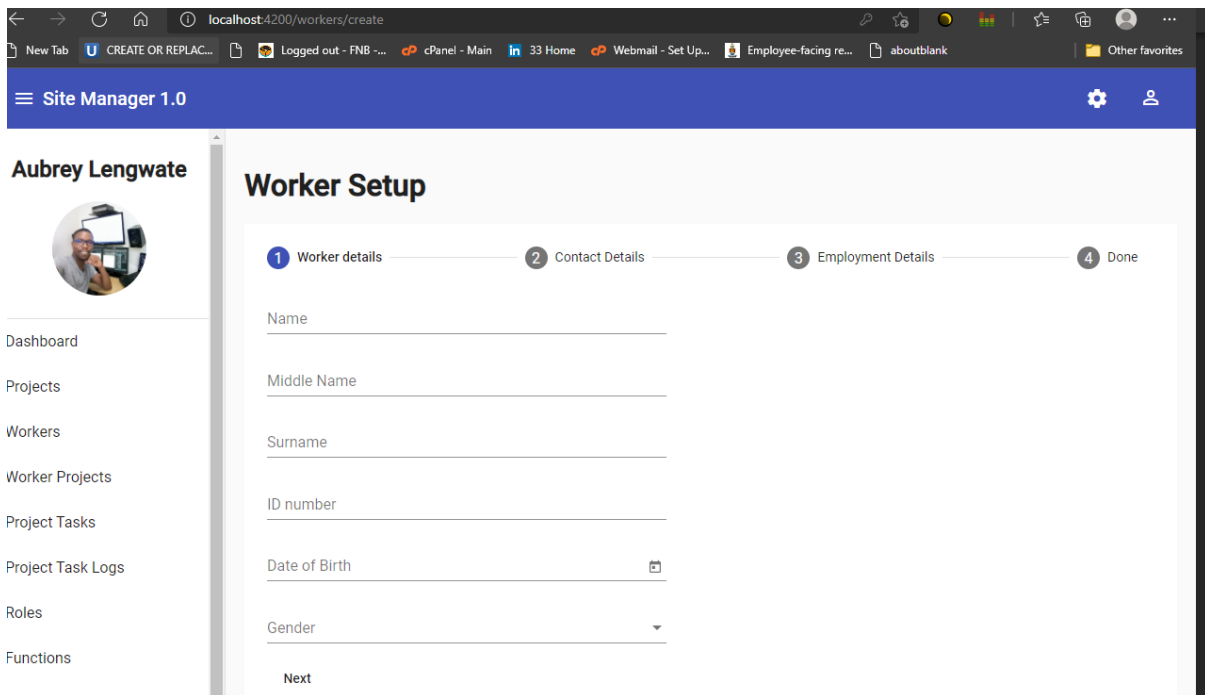
After clicking add worker screen above will appear for capturing.

You can directly move between tabs by clicking the number or next/back buttons.

Once done capturing you can go to the "Done tab" and click "Submit:

Worker Setup

| 1 Worker details | 2 Contact Details | 3 Employment Details | 4 Done |

You are now done.

Back Submit

4. Edit Worker:

For editing an existing record click on the details button:

Workers

Search 🔍   Add Worker

Name	Middle name	Surname	ID number	Date of birth	Gender	Details	Delete
Aubrey	Lucas LING	Lengwate AUDTING	8556565		Male	☰	🗑

Items per page: 5 ▼   1 – 1 of 1 |< < > >|

A screen similar to the add worker screen will appear for capturing. Once done click on Submit to save the record.

Update Worker

| 1 Worker details | 2 Contact Details | 3 Employment Details | 4 Done |

Name
Aubrey

Middle Name
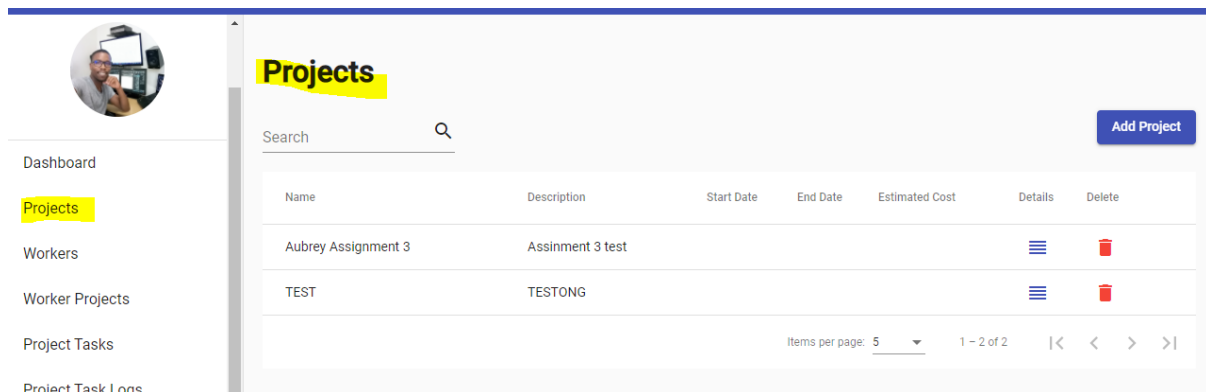Lucas LING

Surname
Lengwate AUDTING
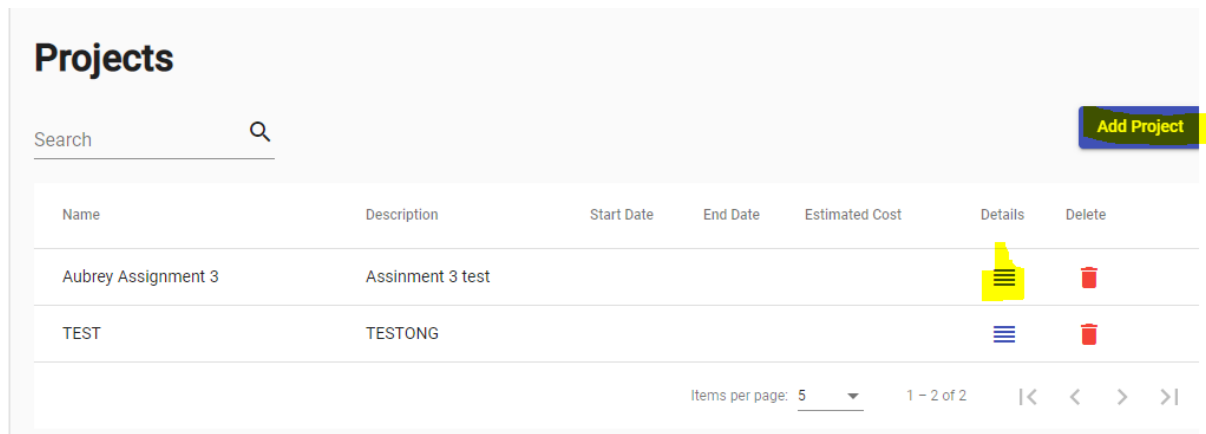
ID number
8556565

Date of Birth 📅

Gender
Male ▼

Next

5. Add Projects:

On the dashboard click on Projects, the projects screen will appear with already existing projects uploaded.

You can add new project on Add Project button and edit on the details button.

6. Add Project Task.

A task will be the main activity that will be done within a project, this can be linked to sub-tasks, E.g Paving, building, laying tar e.t.c.

To access tasks click on the "Tasks" link on in the sidebar:
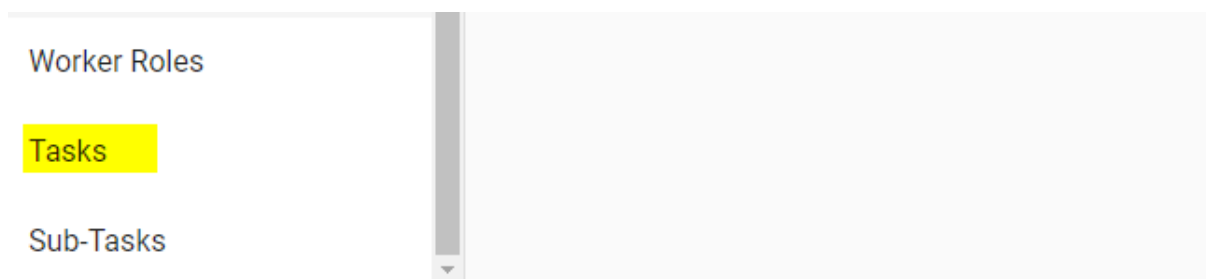
The Tasks screen will appear and you can now click Add Task or edit via the Details buttons as bellow:
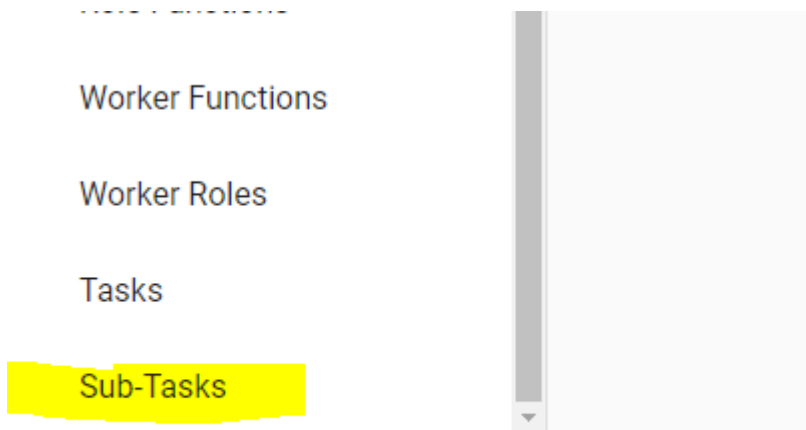

Once done press submit.

7. Adding a subtask.

A subtask is small or activities within a task, e.g in paving there is laying of bricks and grouting which fall under paving. To Access the subtasks click on the "Subtasks" link on the side menu:

This will take you the subtasks screen where you can add new or edit subtasks by clicking on the Add Task or Details button.

There will be a drop down to choose the main task for this subtask, this is to link the subtask to the task.

Capture the costs of the subtask, this will be used during quoting.

Press submit when done to save.

8. Linking Worker to a Project.

Once a project and a worker are captured you can now link the 2, this is to know which workers are working on which project and how much are they charging per hour, this will also be used in the Daily timesheets auto uploads.

Click on the Worker Projects link on the side menu:

The Worker Projects Page will open, once opened you can add or edit records using the "Add Worker Project" and Details links as below:

(NB. The Worker and Project fields will be fixed to show the names)

Use the drop downs to select Worker already captured and link to a project.

Once done go to "Done" and click "Submit"

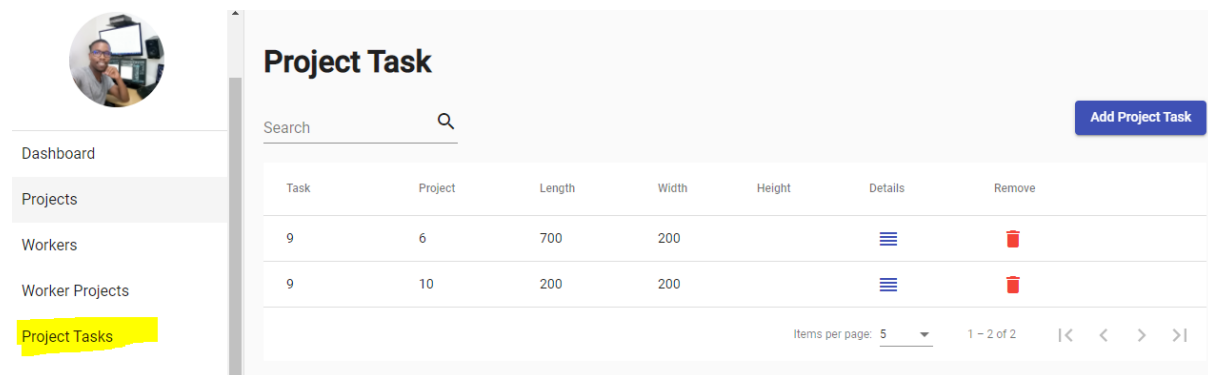**9. Link Tasks to Projects:**

Once A project, task and subtasks are created you can now link them. Click on Project Tasks.

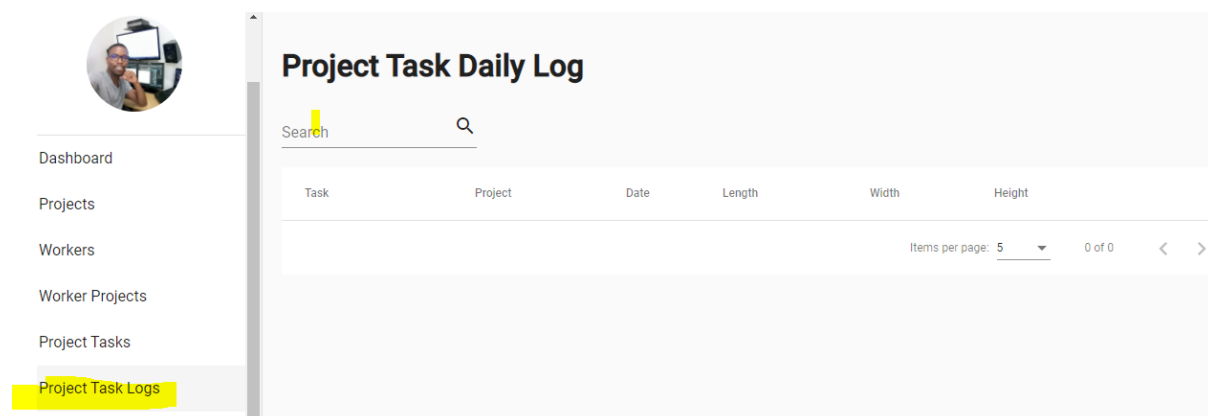(NB. The Task and Project fields will be fixed to show the names)

You can use the Add Project task to add new link or click on Details to amend existing records and press Done the Submit to save.

10. Project Task Logs:

Now that you linked a project to tasks you can now upload daily logs and progress. The system will automatically upload all the tasks linked to the project for supervisor to update. There will no be an option to add new records here, if a task was done and needs to be logged it must first be linked to the project.

The same functionality above will apply to Project Worker Daily Log. More screens for project management such as amending previous logs and reporting are still under development and the document will be updated accordingly.

Access Control:

1. Create Roles:

A role will be a collection of accesses to common screens which can be assigned to a worker as a buddle access. To access the Roles screen click on "Roles" link on the sidemene:
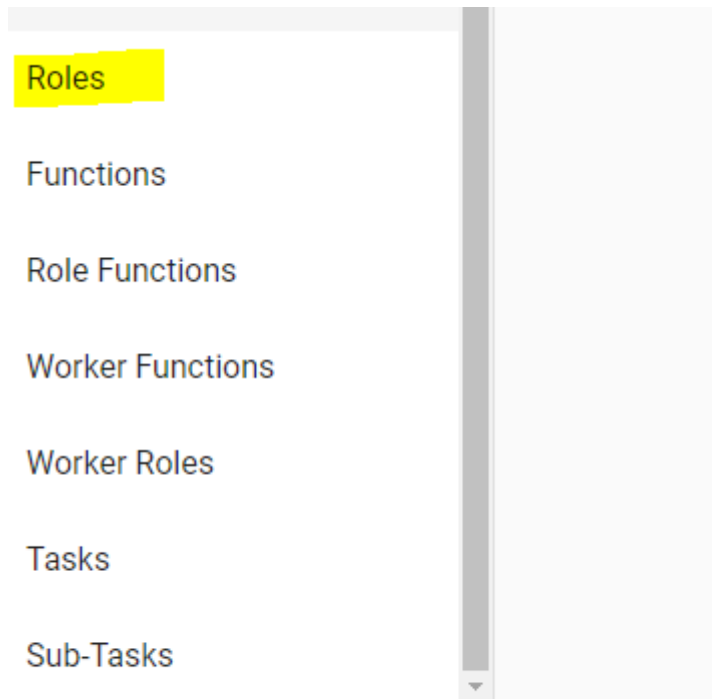
You can update or add new roles by clicking on the Details or Add Role buttons:

Once done click on the Submit button.

2. Add/Edit Functions:
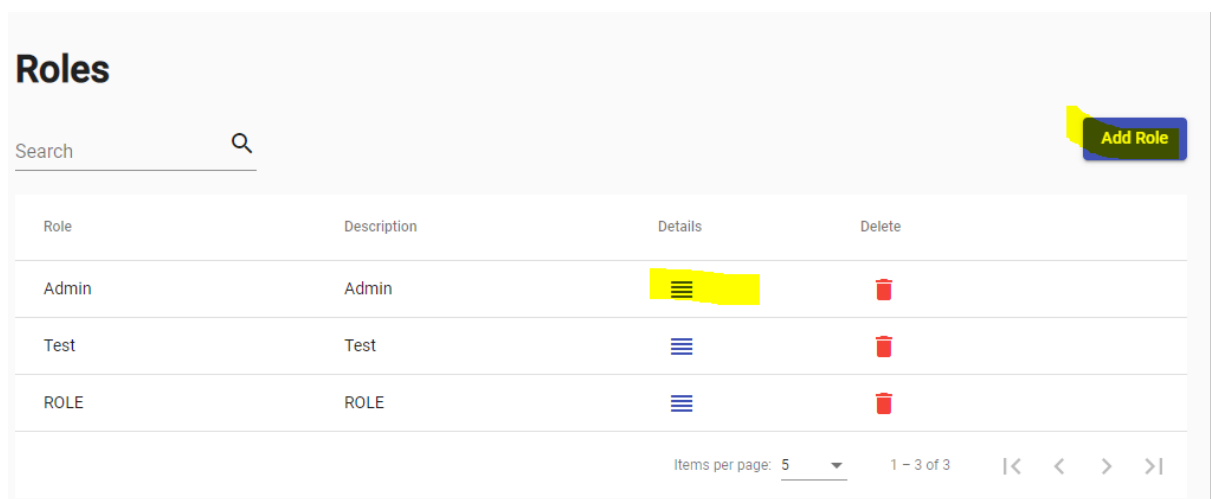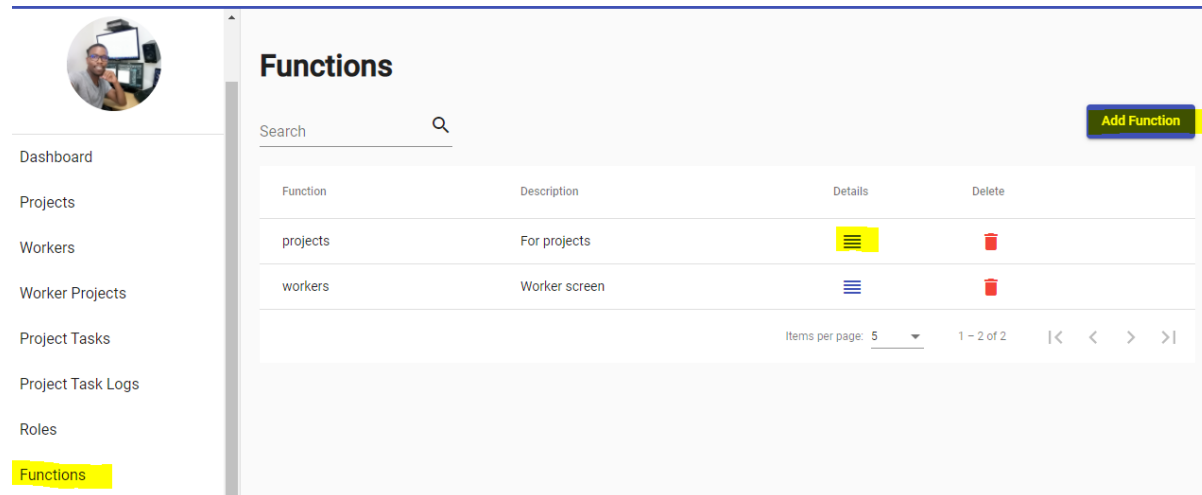
Functions are the screens on the system, like projects, workers, subtasks e.t.c. these need to be captured so they can be linked to a user or a role to grant or revoke access.

To create/edit Functions click on the "Functions" link on the Side Bar:

This will show all existing functions, you can add new one or edit existing by clicking on Add Function or details button. Once done press on Submit to commit.

3. Create or Edit role functions:

Once Roles and Functions are created you can now link the two, to say worker who is on this role can access this list of screens.

Click on Role Functions Link on the side bar, use the Details/Add buttons to create or update records, drop downs for existing roles and functions will be available.
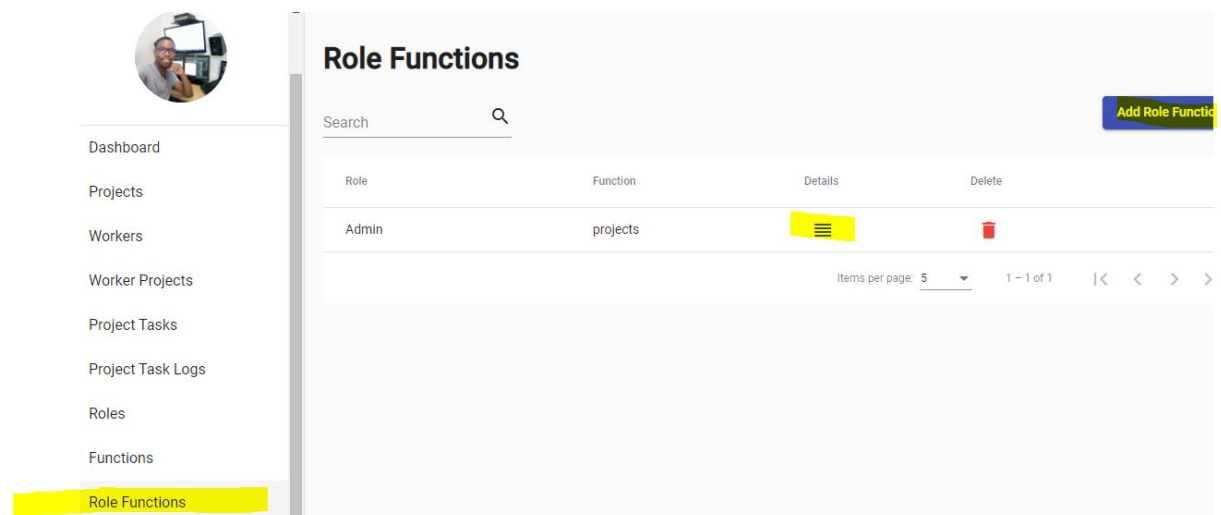
4. Worker Roles:

Once Roles and Functions are created and linked to each other you can now assign a worker to roles, this worker will inherit the access under that role.
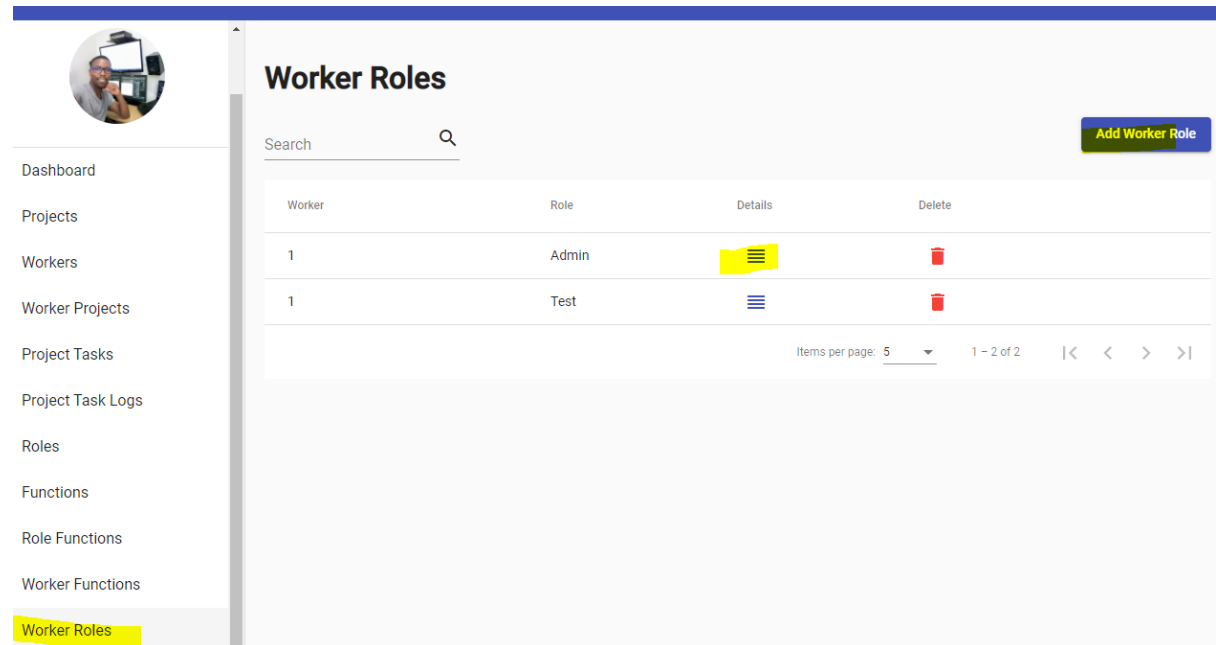

Use Details and Add Worker Role buttons to create new or amend existing records.

5. Worker Functions:

Sometimes a user may have a role that has less or more access than required, this role function detail can be overridden at user level by granting access to a function not in a role to a user, or revoking access assigned to a role a user is linked to.

To do this click on the Worker Functions link on the side menu and use the Details and Add buttons to amend records:
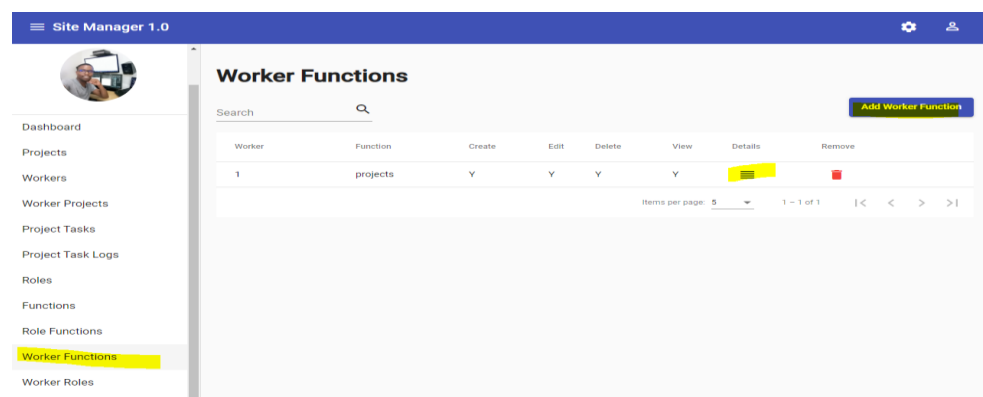
The UML diagram to the system is as below, this shows how the screens link together: