

Echelon – Employee Hierarchy Management System

User Guide

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Github Link: <https://github.com/Cyb3rC0de7/echelon>

Website Link: <https://echelon-epiuse-8bc39b155203.herokuapp.com/>

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Getting Started

System Requirements

- Modern web browser (Chrome, Firefox, Safari, Edge)
- Internet connection
- Valid employee credentials

Accessing the System

1. Navigate to the Echelon application URL: <https://echelon-epiuse-8bc39b155203.herokuapp.com/>
2. The system will automatically redirect you to the login page if you're not authenticated
3. Use the demo email address and password to log in as the system administrator

System Overview

Echelon is an organization employee management system that allows you to:

- View and manage employee information
- Visualize the company's organizational structure
- Update your personal information
- Search for colleagues and their details
- Manage reporting relationships (based on your permissions)

The system adapts to your role, showing only the information and features you have permission to access.

Logging In

First Time Login

1. Enter your company email address
2. Use the temporary password provided by your administrator (*nameEmployeeNumber*)
3. You'll need to change your password on first login

Regular Login

1. **Email:** Enter your company email address
2. **Password:** Enter your current password
3. Click "Sign In"

Demo Credentials

For demonstration purposes:

- **Email:** admin@echelon.com
- **Password:** Admin123!

Forgot Password?

Use a system administrator for password reset.

Understanding User Roles

Echelon has four permission levels, each with different capabilities:

Employee (Basic Level)

- View and edit your own profile
- View colleagues who report to the same manager
- View your direct manager's information
- Change your own password

Manager

- All Employee permissions
- View and edit direct subordinates' information
- Assign reporting relationships for your team members

HR (Human Resources)

- All Manager permissions
- Create new employee accounts
- Edit most employee information (except admin accounts)

Admin (System Administrator)

- Full system access
- Manage all employees including other admins
- System administration features

Note: Your current role is displayed in the top-right corner of the screen.

Employee List Management

Accessing the Employee List

The Employee List is the default view when you log in. It shows all employees you have permission to see.

Table View Features

- **Profile Pictures:** Gravatar images appear automatically based on email addresses
- **Employee Details:** Number, name, email, role, and salary (if permitted)
- **Manager Information:** Shows who each employee reports to
- **Action Buttons:** Edit, delete, or reset passwords (based on permissions)

Card View

Switch to Card View for a more visual representation:

1. Click the "Card View" button above the employee list
2. Each employee appears as an individual card with their photo and key information
3. Action buttons appear at the bottom of each card

Status Management (Admin Only)

Admins can activate/deactivate employees using the toggle switch in the Status column.

Adding New Employees

Who Can Add Employees

- HR personnel
- System administrators

Adding a New Employee

1. Click the "Add Employee" tab
2. Fill in the required information:
 - **Employee Number:** Unique identifier (cannot be changed later)
 - **First Name** and **Last Name**
 - **Email Address:** Must be unique in the system
 - **Birth Date:** Use the date picker
 - **Salary:** Enter amount in South African Rand (R)
 - **Role:** Select from the dropdown list
 - **Manager:** Choose from existing employees (optional)
3. Advanced Options (Admin only):
 - **Permission Level:** Set user access level
 - **Active Status:** Enable/disable the account
4. Click "Create" to add the employee

Default Passwords

New employees receive a default password: `[FirstName][EmployeeNumber]`

Example: For "John" with employee number "EMP123", the password would be "JohnEMP123"

Editing Employee Information

Accessing Employee Edit

1. Find the employee in the Employee List
2. Click the Edit button (pencil icon)
3. The edit form will open in a dialog box

What You Can Edit

Your editing permissions depend on your role:

Editing Your Own Profile

All users can edit their own:

- Name and surname
- Email address
- Birth date

Manager Permissions

Managers can edit their direct subordinates':

- Basic information (name, email, birth date)
- Assign new managers within their team

HR Permissions

HR can edit most employees':

- All basic information
- Salary information
- Role assignments
- Manager relationships
- Permission levels (except Admin)

Admin Permissions

Admins can edit everything for all employees, including:

- All information fields
- Permission levels (including Admin)
- Account status (active/inactive)

Saving Changes

1. Make your desired changes
2. Click "Update" to save
3. Click "Cancel" to discard changes

Organization Hierarchy View

Accessing the Hierarchy

Click the "*Hierarchy View*" tab to see your organization's structure as an interactive tree diagram.

Navigation Controls

- **Zoom In/Out:** Use the zoom buttons or scroll with your mouse wheel
- **Pan:** Click and drag the background to move around
- **Fit to Screen:** Centers and scales the view to show the entire organization

Interactive Features

Drag and Drop (Managers, HR, Admin)

- Drag an employee's box to a new manager to change reporting relationships
- The system prevents invalid moves (like making someone their own manager)
- Changes are saved automatically

Employee Selection

- Click on any employee box to view their detailed information in the side panel
- The selected employee's information appears on the right side

Search Functionality

1. Use the search bar at the top to find specific employees
2. Search works for names, email addresses, roles, or employee numbers
3. Use "Previous" and "Next" buttons to cycle through search results
4. The view will automatically center on found employees

Side Panel Information

When you select an employee, the right panel shows:

- Profile picture (from Gravatar)
- Full name and employee number
- Role and permission level
- Email address and birth date
- Salary (if you have permission to view)
- Manager information

Password Management

Changing Your Password

1. Click the "Change Password" tab
2. Enter your Current Password
3. Enter your New Password (minimum 6 characters)
4. Confirm your new password
5. Click "Change Password"

Password Requirements

- Minimum 6 characters
- Must be different from your current password

Reset Password (Admin Only)

Administrators can reset any employee's password:

1. Find the employee in the Employee List
2. Click the Reset Password button (lock icon)
3. Confirm the action
4. The system generates a new default password: *[FirstName][EmployeeNumber]*

Search and Filtering

Basic Search

Use the search bar in the Employee List to find employees by:

- First name or last name
- Employee number
- Email address
- Job role

Advanced Filtering (Admin)

Permission Level Filters

Click on any statistic card to filter by permission level:

- **Total:** Shows all employees
- **Admins:** Shows only administrators
- **HR:** Shows only HR personnel
- **Managers:** Shows only managers
- **Employees:** Shows only basic employees
- **Inactive:** Shows only deactivated accounts

Status Filters

Filter employees by their account status:

- Active employees
- Inactive employees

Clearing Filters

- Click individual filter chips to remove them
- Use "Clear All" to remove all active filters
- Active filters are displayed below the search bar

Hierarchy Search

In the Hierarchy View:

1. Enter search terms in the search bar
2. The system will highlight matching employees
3. Use navigation buttons to jump between results
4. The view automatically centers on each result

Profile Pictures (Gravatar)

How Profile Pictures Work

Echelon integrates with Gravatar (Globally Recognized Avatars) to display profile pictures:

1. **Automatic Display:** Pictures appear based on the email address in your profile
2. **No Upload Needed:** The system automatically fetches images from Gravatar
3. **Default Images:** If no Gravatar exists, a generated avatar appears

Setting Up Your Gravatar

1. Visit gravatar.com
2. Create an account using your work email address
3. Upload your preferred profile picture
4. Your image will automatically appear in Echelon within a few minutes

Privacy Note

Gravatar images are public and associated with your email address. Only use professional, appropriate images.

Troubleshooting

Common Issues and Solutions

Cannot Log In

Problem: "Invalid credentials" error

Solutions:

- Check your email address spelling
- Ensure Caps Lock is off
- Contact an administrator for password reset

Profile Picture Not Showing

Problem: Generic avatar appears instead of your photo

Solutions:

- Verify your Gravatar account, uses your work email
- Allow up to 15 minutes for changes to appear
- Clear your browser cache

Cannot Edit Employee Information

Problem: Edit buttons are disabled or missing

Solutions:

- Check your permission level (displayed in top-right corner)
- You can only edit employees within your authority
- Contact HR or Admin for permission changes

Hierarchy View Not Loading

Problem: Tree diagram appears empty or broken

Solutions:

- Refresh the page
- Try zooming out to see if employees are outside the visible area

Search Not Working

Problem: No results appear for known employees

Solutions:

- Clear any active filters
- Try searching with partial names
- Remember you can only see employees within your permission scope

Drag and Drop Not Working

Problem: Cannot move employees in hierarchy view

Solutions:

- Ensure you have Manager, HR, or Admin privileges
- Check that you have permission to manage the specific employee
- Refresh the page and try again

Browser Compatibility

Echelon works best with modern browsers:

- Recommended: Chrome 90+, Firefox 88+, Safari 14+, Edge 90+
- Minimum: Chrome 80+, Firefox 75+, Safari 13+, Edge 80+

If using an older browser, some features may not work correctly.

Tips for Best Results

Navigation Tips

- Use the refresh button if data seems outdated
- The system auto-saves changes, but confirmation messages appear
- Use keyboard shortcuts: Tab to navigate, Enter to submit forms

Data Entry Tips

- Employee numbers must be unique and cannot be changed later
- Email addresses must be valid and unique across the system
- Date fields accept various formats, but the date picker is recommended

Performance Tips

- Use the search function to find employees quickly in large organizations
- Switch between Table and Card views based on your preference