

EPI-USE Assessment Project

User Manual

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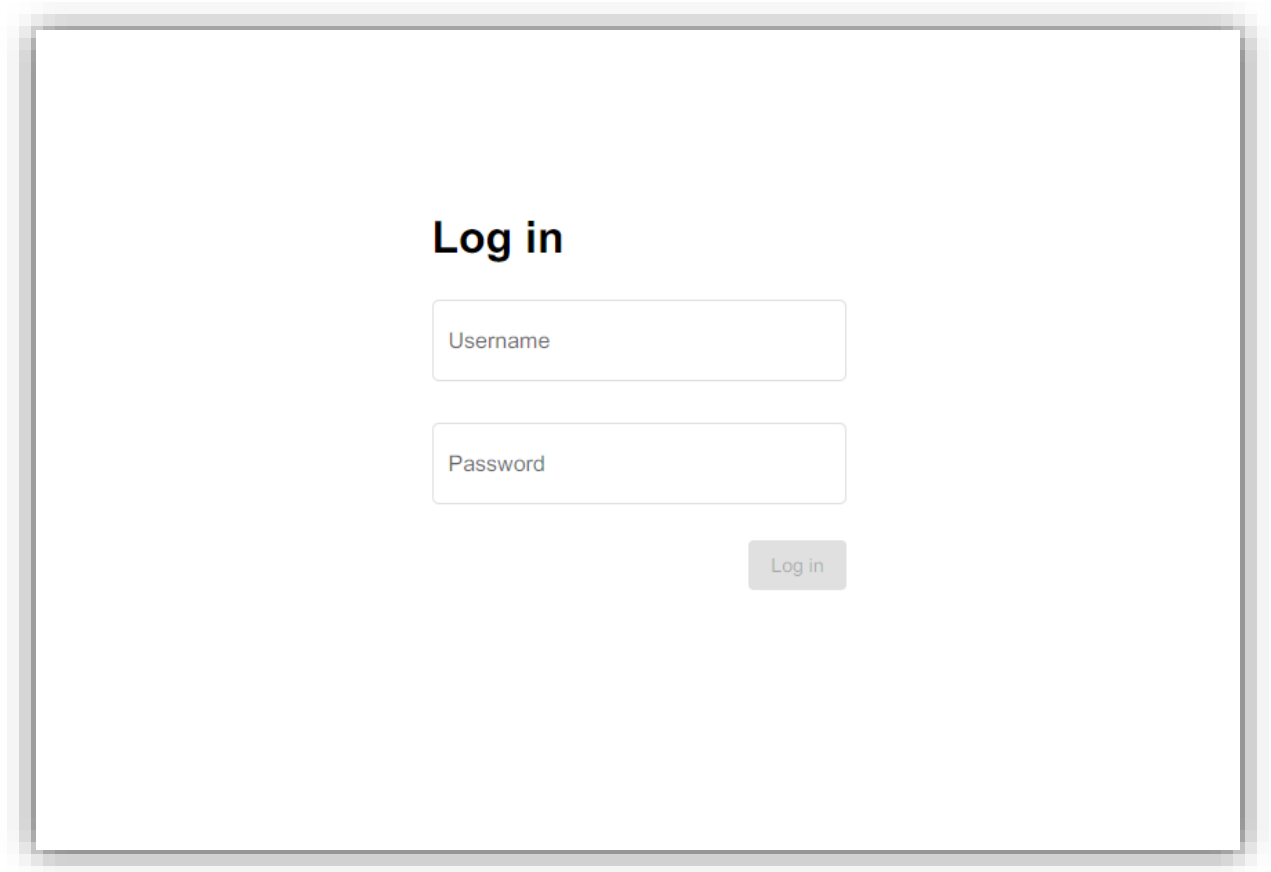
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Accessing the application

The application can be accessed through your web browser (e.g. Google Chrome) at <https://epi-use-assessment.herokuapp.com/>

Log In

The application will display the login screen:



Log in

Username

Password

Log in

Click on the **username** field and enter your username (e.g. *admin*).

Click on the **password** field and enter your password (this will be provided for you).

Log in

Username

Password

Log in

The log in button will change colour and become clickable once a username and password have been entered.

Click the **Log In** button to log in.

This may take a few seconds.

If either the username or password you entered were incorrect, an error message *“invalid credentials”* will be displayed.

Enter different credentials (username/password) and try log in again.

Log in

Username

Password

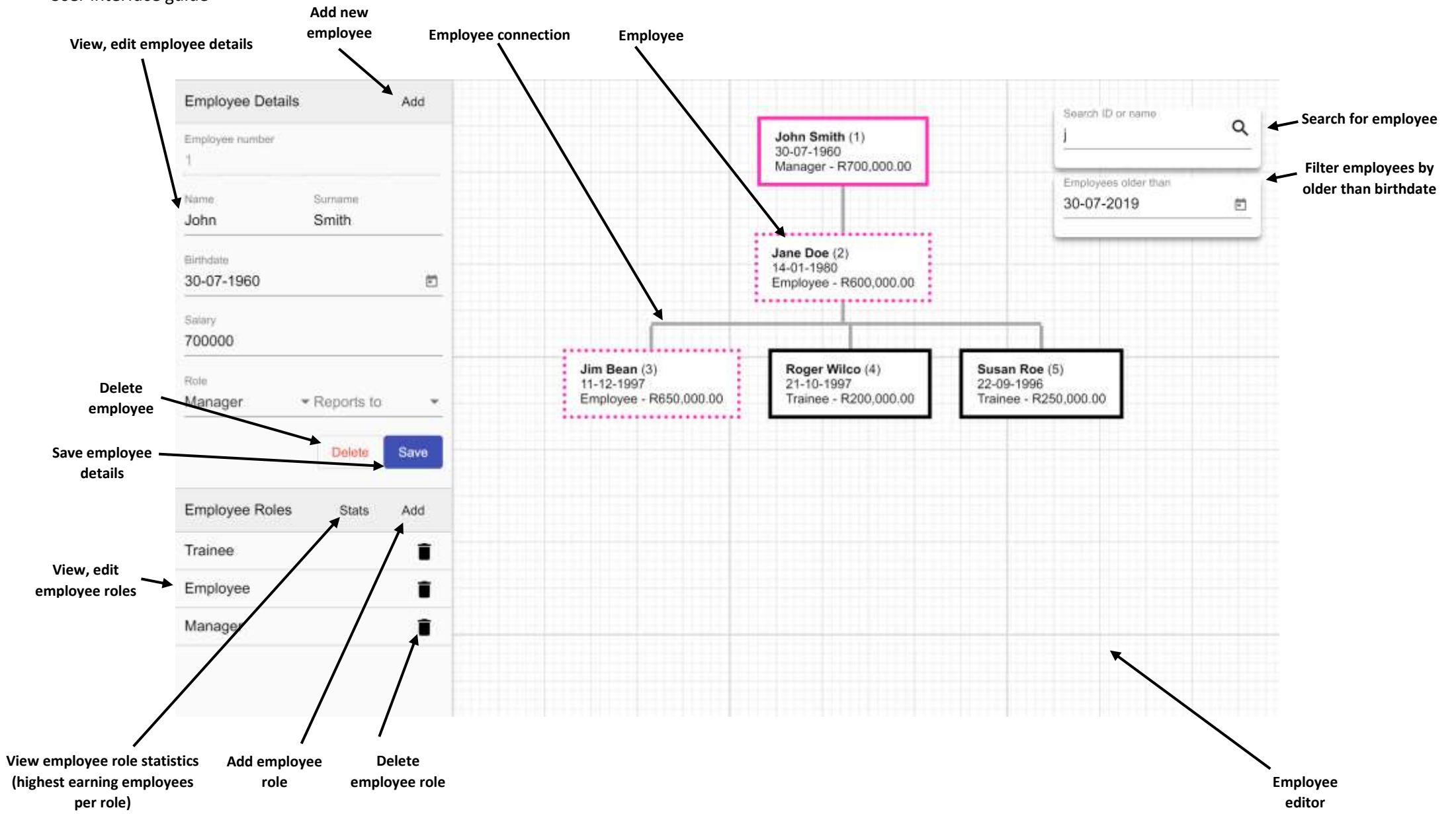
Invalid credentials

Log in

Once a valid username/password combination is entered, you will be redirected to the editor page.

Editor page

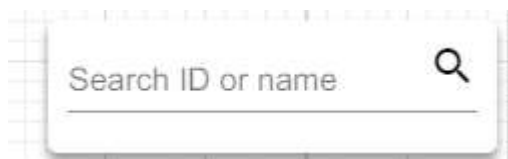
User interface guide



Filtering

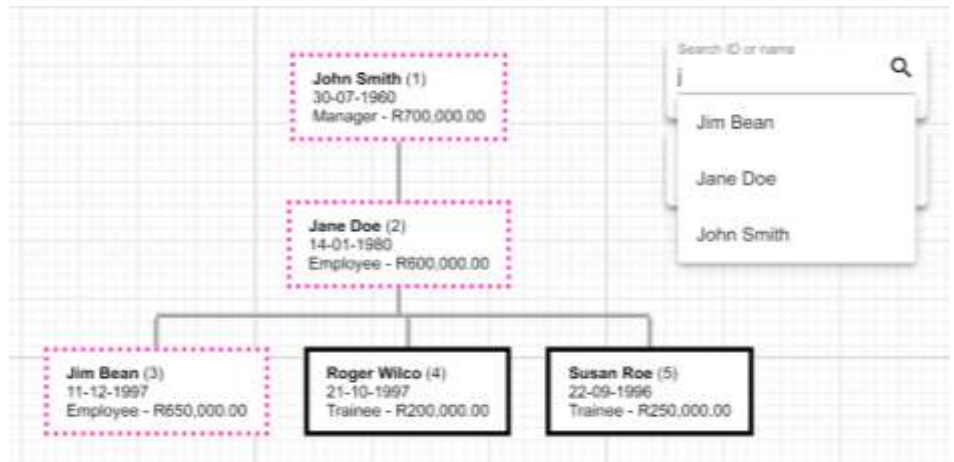
Search by name or ID

The search bar is at the top-right of the screen

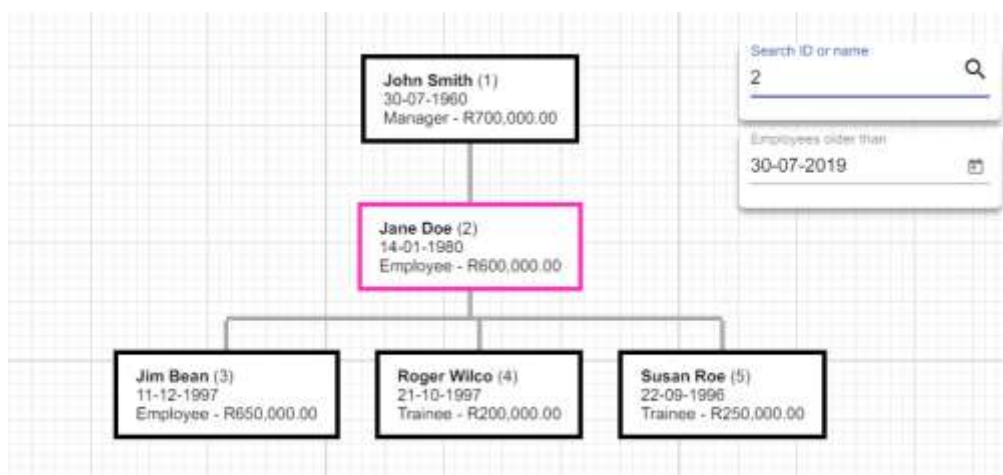


You can enter an employee's name and/or surname (e.g. *Matthew Evans* or *Evans*) to search by name. Note that uppercase and lowercase letters are treated the same (e.g. *Matthew* is the same as *matthew*).

As you type, a dropdown list of employees who match the selected criteria will appear. These employees will also receive a dotted border highlighting them in the editor.



You can also search by ID (the ID must match fully and will not show suggestions).

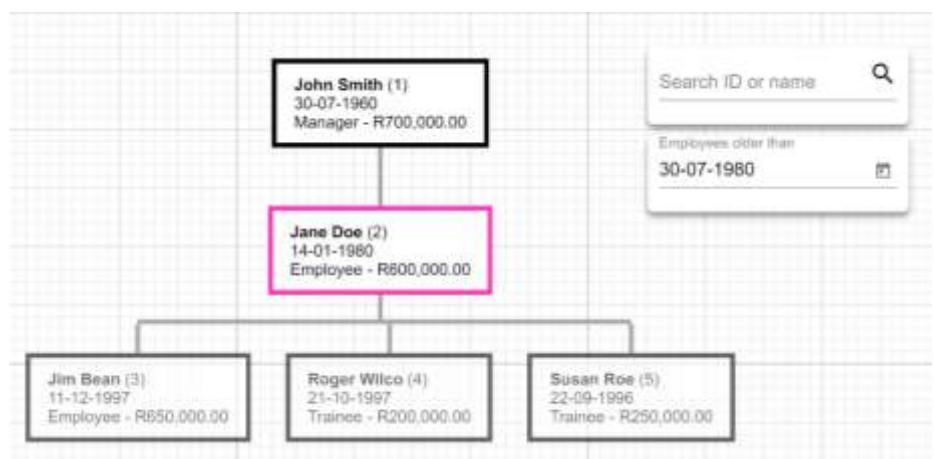


You can select an employee from the dropdown to select that specific employee (though you do not have to). You can scroll down to view more results if there are many results.

When selecting a name, your search term will be replaced by the employee's employee number.

Filter by "older than" birthdate

The filter is available at the top-right of the editor. This is used to filter employees by finding those who are older than a given date. Employees younger than this date (i.e. who were born after the date selected) are made less visible in the editor.



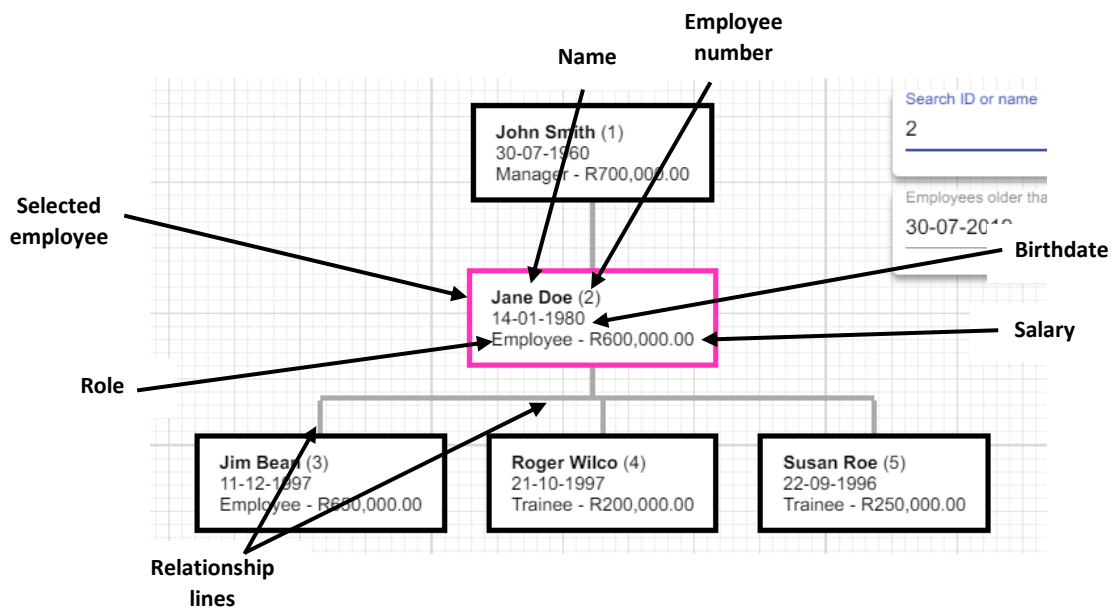
Employee

Every employee has the following properties:

- Employee number
- Name
- Surname
- Birthdate
- Salary
- Role designation (henceforth referred to as “role”)
- Reports to employee

Employees are represented in a hierarchy. Employees who do not report to anyone appear at the furthest left of the hierarchy.

For example, consider Jane Doe in the following example:



Jane reports to John Smith. Jim Bean reports to Jane Doe.

Edit Employee

To view an employee's details, edit their details, or delete the employee, start by clicking on the employee.

The employee will become highlighted, as seen on the right.

****Note:** An employee role must exist before an employee can be added. Please see the section on employee roles for information on how to add a role.

Jane Doe (2)
14-01-1980
Employee - R600,000.00

Employee Details		Add
Employee number 5		
Name	Surname	
Susan	Roe	
Birthdate 22-09-1996		
Salary 250000		
Role	Reports to	
Trainee	▼ Jane Doe	
<div>Delete Save</div>		

Employee Roles	Stats	Add
Trainee		
Employee		
Manager		

In the sidebar, as on the left, the employee's details will become visible.

Here, you can change the employee's details. An employee's employee number cannot be modified. This is automatically handled by the system.

Role field

The role field contains any of the roles added in the **Employee Roles** editor. The available roles in this list will change instantaneously when changed in the **Employee Roles** editor.

Reports to field

This field shows only employees who the selected employee can report to. Employees cannot report to themselves, and they cannot report to anyone who directly or indirectly reports to them. For example, if John Doe reports to Jane Doe, Jane Doe cannot report to John Doe.

Add employee

Click the **Add** button to the right of the **Employee Details** header. This will set the employee details rows as empty. Click the **save** button to save the employee.

Edit employee details

Click the **save** button to save the employee's details. If this button is not pressed, your changes will not be applied.

Save employee details

Click the **delete** button to delete the employee. A dialog box will pop up to confirm deletion:

Really delete employee?

Employee **Susan Roe** will be deleted permanently.

This action cannot be undone.

Cancel

Delete Employee

Employee Roles and editing

Employee Roles	Stats	Add
Employee		
Manager		

The employee roles editor is visible in the sidebar to the bottom-left of the page. This editor allows you to view, add, edit and delete employee roles.

Adding a role

To add a role, click the **Add** button at the top-right. This will add a new role called “New Role”.

Employee Roles	Stats	Add
New Role		
Employee		
Manager		

Editing a role

To change the name of a role, simply click on its name. This will allow you to now edit the role’s name. Click away from the field to save it.

Employee Roles	Stats	Add
New Role		
Employee		
Manager		

Employee Roles	Stats	Add
Trainee		
Employee		
Manager		

Deleting a role

To delete a role, click the trash can icon to the right of the corresponding role. If there is only one role, this button will be disabled, as there must always be at least one role present.

Upon clicking the button, a dialog will be presented as is visible to the right.

You must select a different role to replace the role you are deleting. Every employee who currently has the role being deleted will be assigned to this role.

Delete role

This operation cannot be undone

Deleting a role requires it be replaced by another role.

Replace role with

Employee

CancelDelete