

Employee Relations Management App (ERM)

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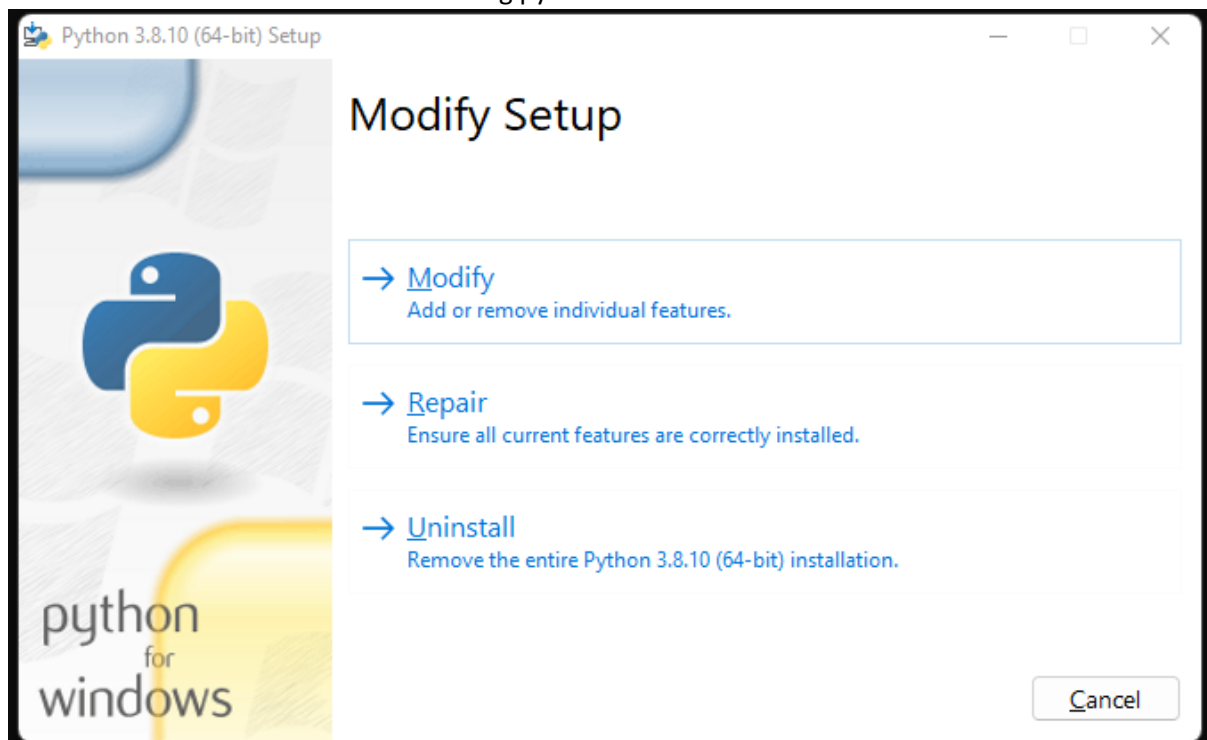
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Installation:

In the “crmproject” folder, you will see a bunch of files, these are all that would be required to setup and run the program. Double click or run the “installer.sh”. This will start the installation process and provide the setup steps to install python first.

Name	Date modified	Type	Size
client	2022/08/27 13:08	File folder	
crm	2022/08/27 15:13	File folder	
docs	2022/08/28 00:31	File folder	
db.sqlite3	2022/08/27 21:51	SQLITE3 File	136 KB
installer.sh	2022/08/27 19:28	Shell Script	1 KB
manage.py	2022/08/26 11:48	Python File	1 KB
python-3.8.10-amd64.exe	2022/08/27 09:17	Application	27 634 KB
README.txt	2022/08/27 09:17	Text Document	0 KB
requirements.txt	2022/08/27 18:36	Text Document	4 KB

If you already have python installed you will see the following prompt, simply click on “Cancel” to continue the installation without installing python.

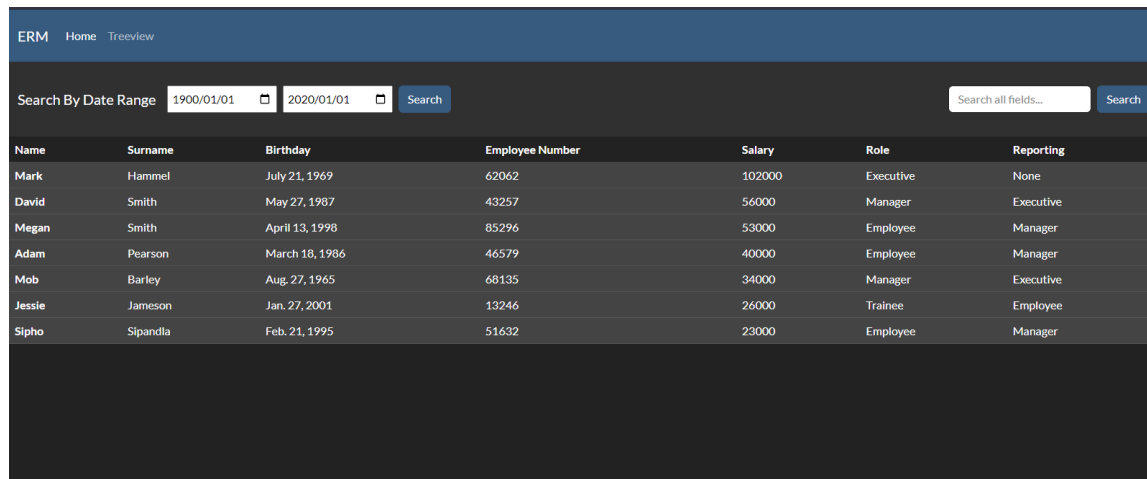


From here onwards there is nothing you need to do. The installer will get and install the project requirements and automatically start the app in the background and open a browser window once it is ready.

Usage Guide

Homepage

The following screenshot is an example of what you'll see when the app is started. Initially it shows all the entries in the database and is by default sorted by Salary (descending).



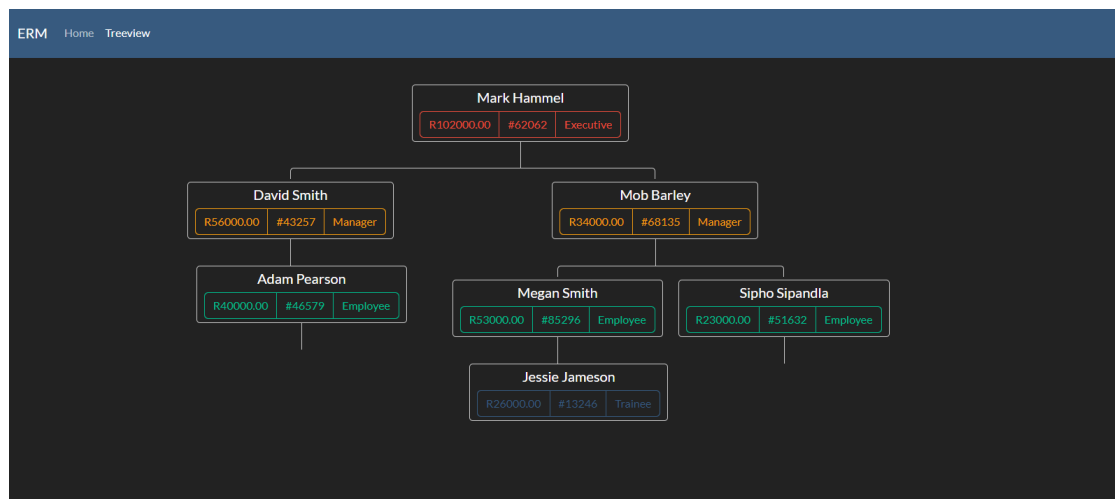
The screenshot shows the ERM application interface. At the top, there's a navigation bar with 'ERM', 'Home', and 'Treeview'. Below it, a search bar allows filtering by 'Date Range' (from 1900/01/01 to 2020/01/01) and a general 'Search' button. The main area displays a table of employees sorted by salary in descending order.

Name	Surname	Birthday	Employee Number	Salary	Role	Reporting
Mark	Hammel	July 21, 1969	62062	102000	Executive	None
David	Smith	May 27, 1987	43257	56000	Manager	Executive
Megan	Smith	April 13, 1998	85296	53000	Employee	Manager
Adam	Pearson	March 18, 1986	46579	40000	Employee	Manager
Mob	Barley	Aug. 27, 1965	68135	34000	Manager	Executive
Jessie	Jameson	Jan. 27, 2001	13246	26000	Trainee	Employee
Sipho	Sipandla	Feb. 21, 1995	51632	23000	Employee	Manager

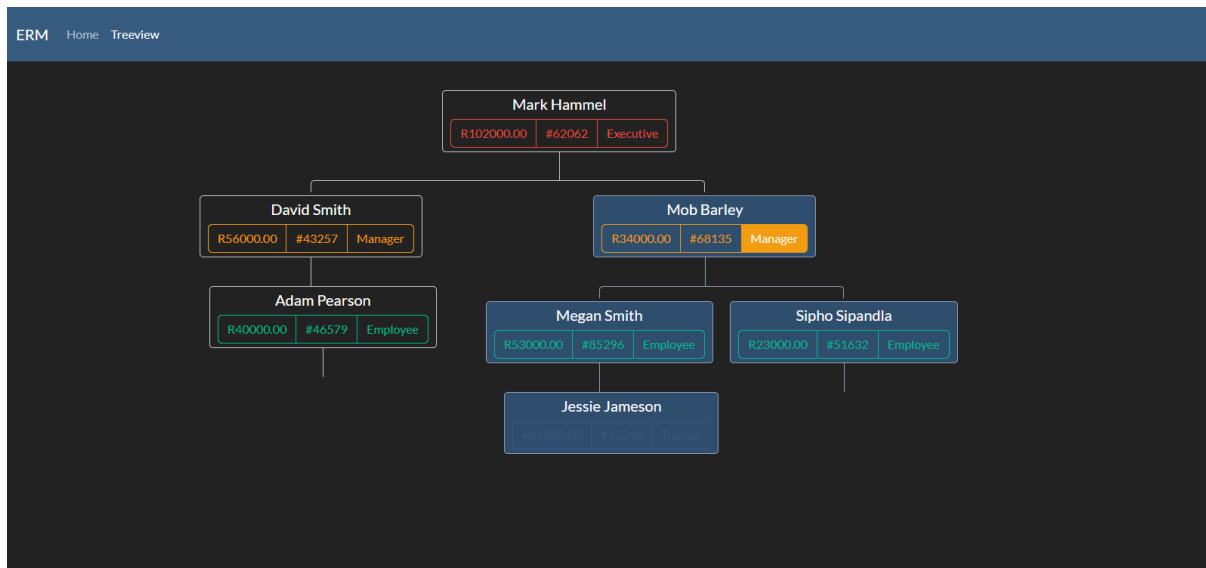
Treeview

This is a fully dynamic reporting structure based on the data in the database. It is meant to be intuitive and functional. It shows to which each person should report to based on their employee number. The colour accents indicate the role of the person with the following allocations:

- **Red:** Executives, Directors & Board Members (Executives)
- **Yellow:** Supervisors, Foremen & Managers (Managers)
- **Green:** Employees
- **Blue:** Interns, Graduates etc (Trainees)



Hovering over any of the name cards in this treeview will highlight everyone who is reporting to the selected person and those down the line. This helps maintain a visual relationship to map accountabilities.



Sorting by Attributes

You can click on a column name in order to sort by that column. You can see which sorting is applied when the active column heading is highlighted in blue. Currently this is only available on the default view and not on search results.

ERM Home Treeview

Search By Date Range

Name	➡ Surname	Birthday	Employee Nu
Mob	Barley	Aug. 27, 1965	68135
Mark	Hammel	July 21, 1969	62062
Jessie	Jameson	Jan. 27, 2001	13246
Adam	Pearson	March 18, 1986	46579
Sipho	Sipandla	Feb. 21, 1995	51632
David	Smith	May 27, 1987	43257
Megan	Smith	April 13, 1998	85296

For sorting by Name and Surname, the Surname and Name will be used as the secondary sort (respectively). So if two people have the same name, it sorts them on Surname. Whereas the Role Description and Salary are used as a secondary search amongst themselves. This is to make it more convenient when trying to view groups or categories of salaries or roles. So two Managers will then be sorted by salary (descending).

Searching

Searching by Date:

There are two date pickers, the left (Red) refers to the Date to start from which by default starts on 1 January 1900, while the right (Green) refers to the date to end on, which by default should have the current date.

Ex.1) Born before 1970/01/01

For a case like this, you need only choose the date to end on, as this will include everyone before it (it is unlikely to have someone be born before 1900, but if you suspect this is the case then you can extend the search to include dates before it). Once an end date is selected click on “Search”.

Name	Surname	Birthday	Employee Number
Mark	Hammel	July 28, 1939	62062
David	Smith	May 4, 1937	43257
Megan	Smith	April 11, 1998	85296
Adam	Pearson	May 18, 1986	46579
Mob	Barley	August 25, 1965	68135
Jessie	Jameson	January 1, 1961	13246
Sipho	Sipandla	Feb. 21, 1995	51632

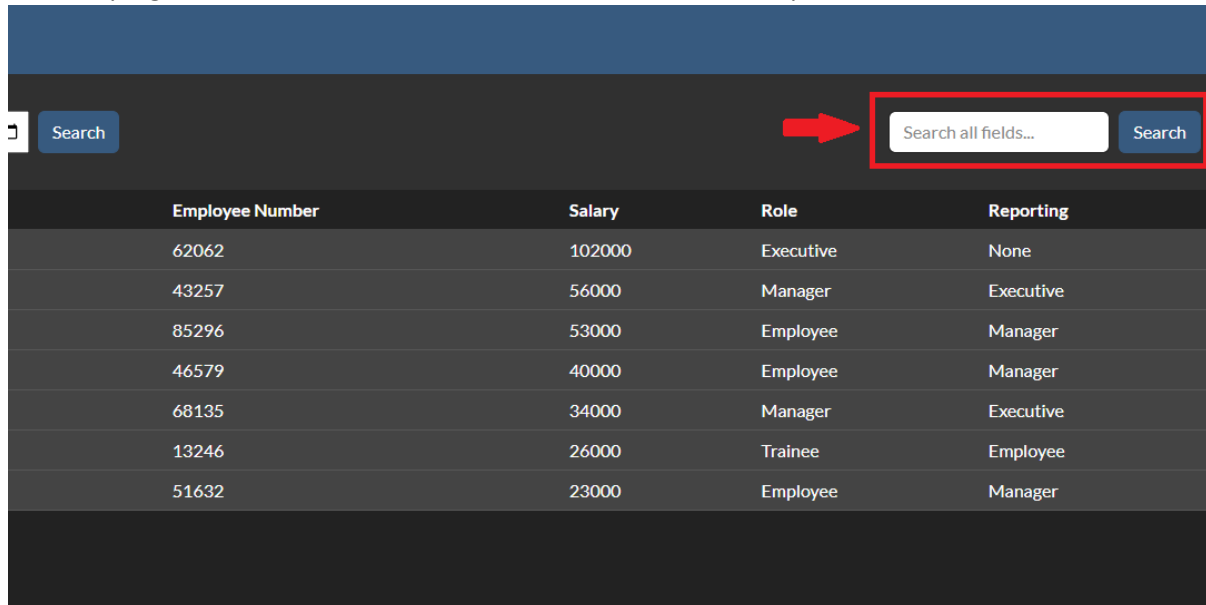
Ex.2) Born after 1970/01/01

In a similar process to above, you need only pick a date in the starting date selector (what this looks like might vary between browsers), and click “Search”. This will return the results of anyone born after 1970/01/01 and up until today.

Name	Surname	Birthday	Employee Number
Mark	Hamme	July 28, 1939	62062
David	Smith	May 4, 1937	43257
Megan	Smith	April 11, 1998	85296
Adam	Pearson	May 18, 1986	46579
Mob	Barley	August 25, 1965	68135
Jessie	Jameson	January 1, 1961	13246
Sipho	Sipandla	Feb. 21, 1995	51632

Full Search

In the top right of the home view there is a search bar with the caption “Search all fields...”.



Employee Number	Salary	Role	Reporting
62062	102000	Executive	None
43257	56000	Manager	Executive
85296	53000	Employee	Manager
46579	40000	Employee	Manager
68135	34000	Manager	Executive
13246	26000	Trainee	Employee
51632	23000	Employee	Manager

This is a case insensitive broad search and looks for full or partial matches of the input in all of the columns (except Birth date). Queries can include anything from a role to a salary to part of an employee number. Please note this will return an entry if there is any column which fully or partially matches the search, so for example searching “Executive” will display everyone with that role, as well as anyone who reports to that role.

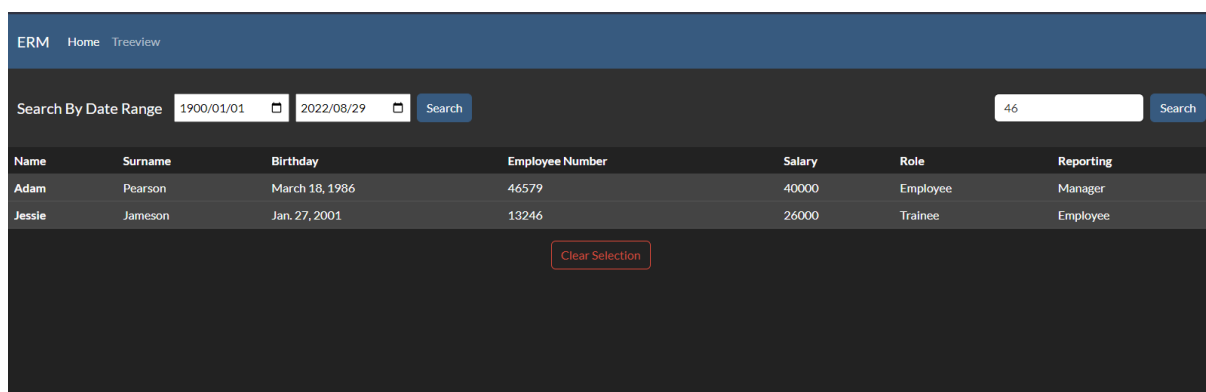
Ex.1) Search Part of an Employee Number

Depending on how the company set up their employee numbers, certain patterns can have meanings (like the attributes of an ID number). If you want to look for someone who has 46 in their employee number, you can type “46” in the input box and click on search.



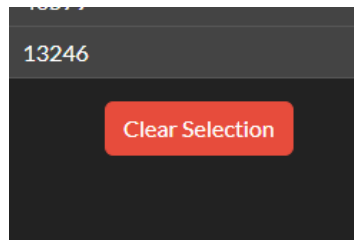
Results

The following screenshot is an example of what the search results would look like for the full search example above. As shown, the two entries both contain “46” as part of their employee number.



Name	Surname	Birthday	Employee Number	Salary	Role	Reporting
Adam	Pearson	March 18, 1986	46579	40000	Employee	Manager
Jessie	Jameson	Jan. 27, 2001	13246	26000	Trainee	Employee

If a search is applied or active, a “Clear Selection” button will be visible in the middle below the table of results. This is one way to determine at a glance whether you are looking at a subset of the data or not.



Clicking on the clear selection button will return you to the default homepage view.