Employee Relations Management App (ERM)

Contents

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.

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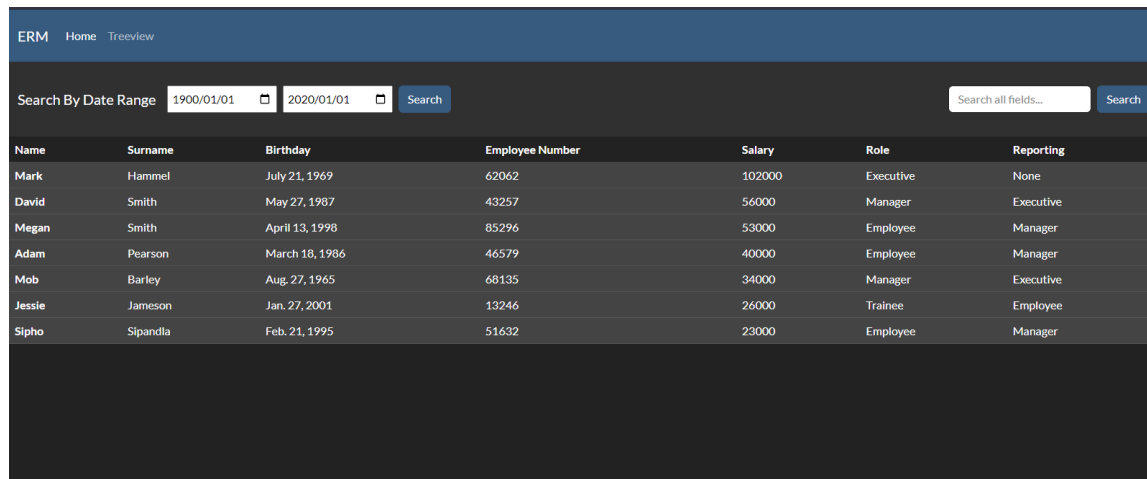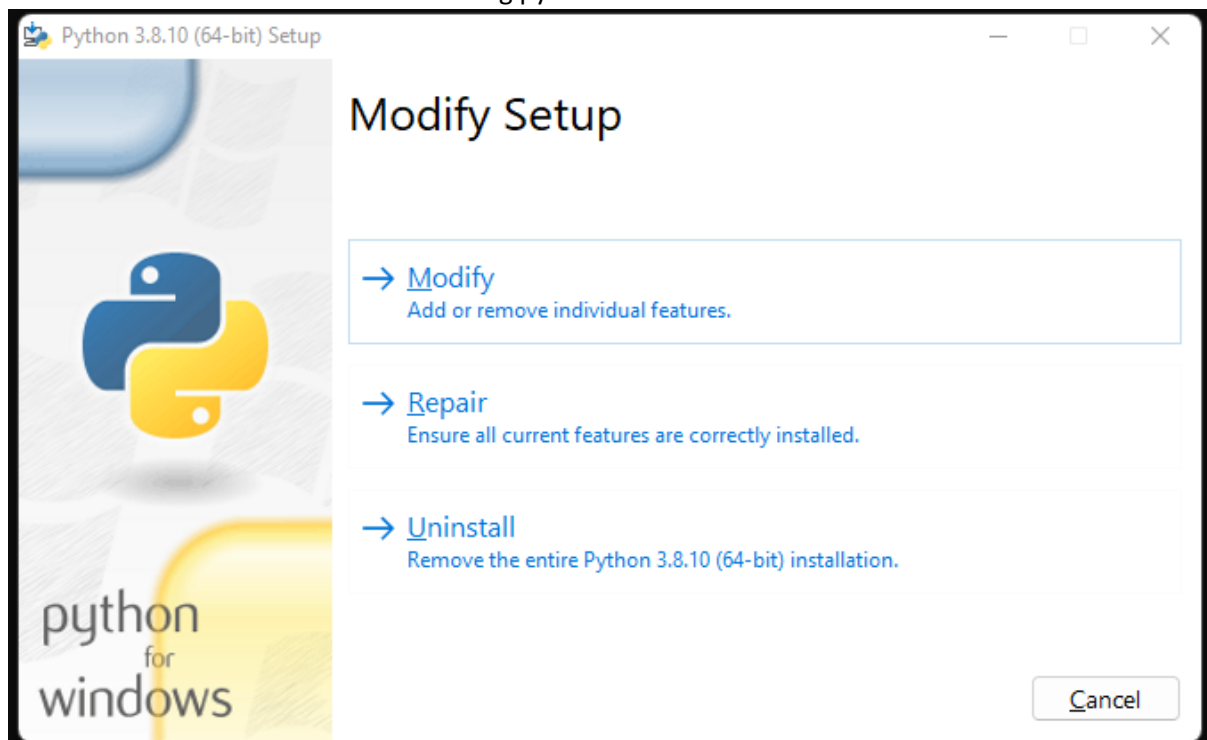

From here onwards there is nothing you need to do. The installer will get and install the project requirements and automatically start the app in the background and open a browser window once it is ready.

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).

ERM	Home	Treeview					
Search By Date Range	1900/01/01	2020/01/01	Search		Search all fields...	Search	

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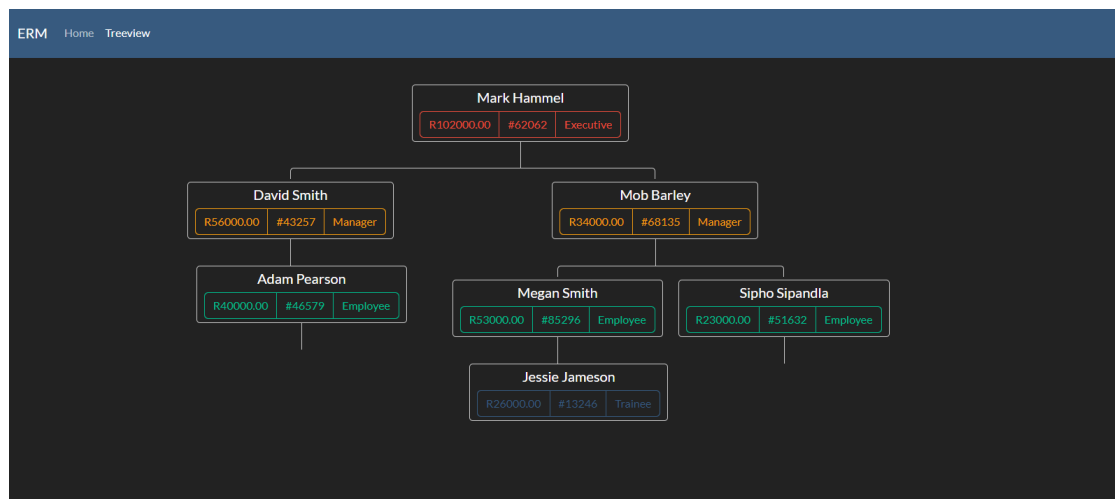
Hovering over any of the name cards in this treeview will highlight everyone who is reporting to the selected person and those down the line. This helps maintain a visual relationship to map accountabilities.
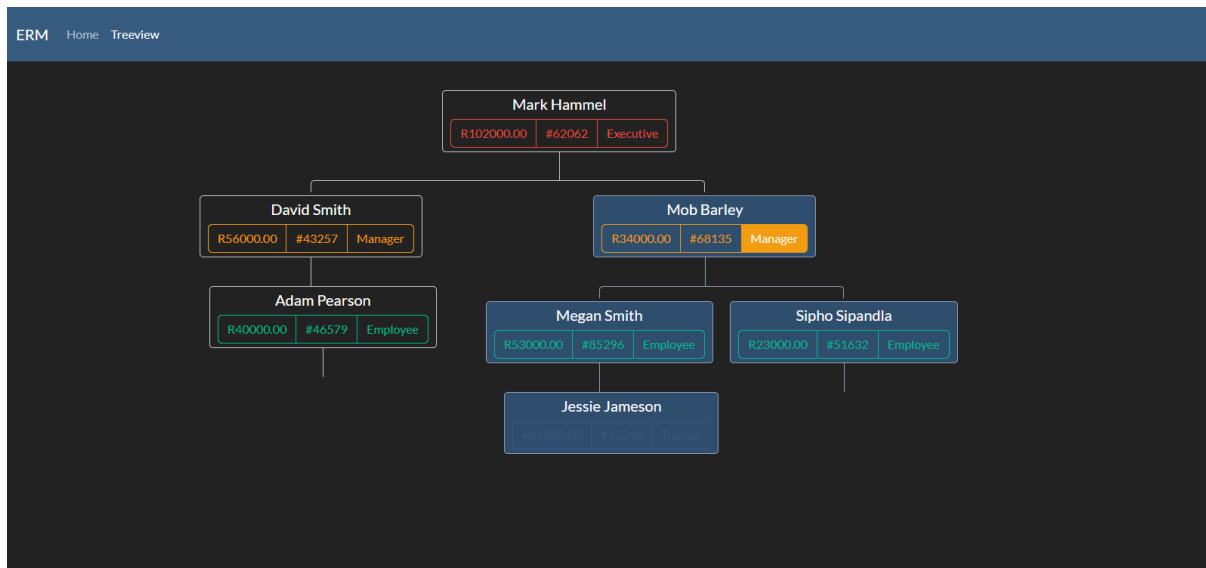
Sorting by Attributes

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.

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".
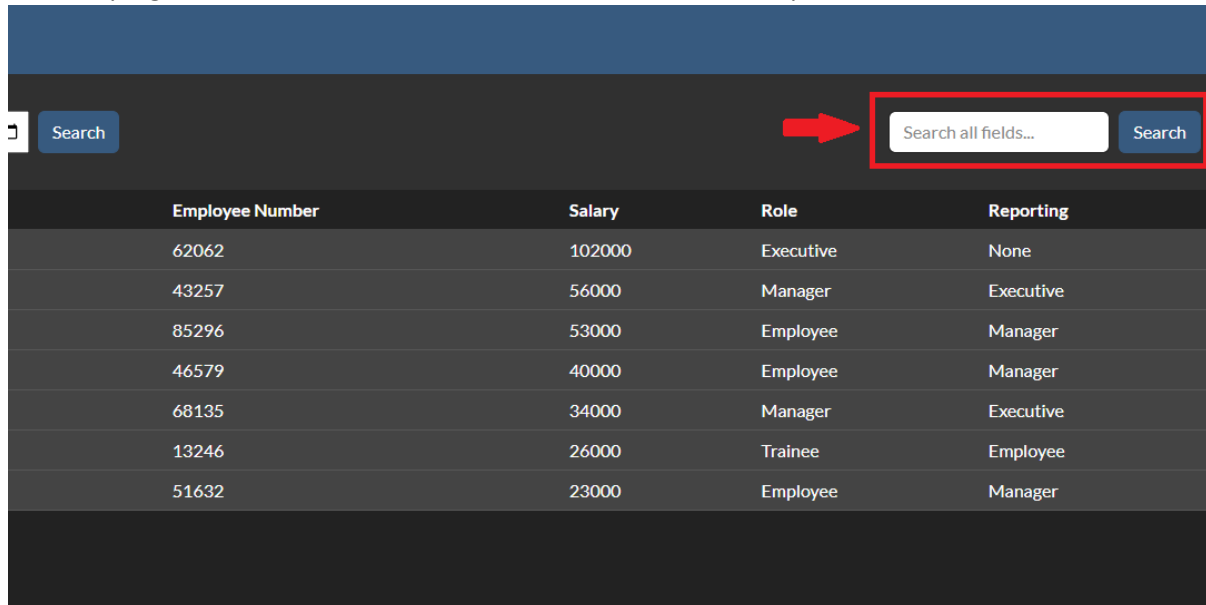

Ex.2) Born after 1970/01/01

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.

Full Search

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

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 numbe. Please note this 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.
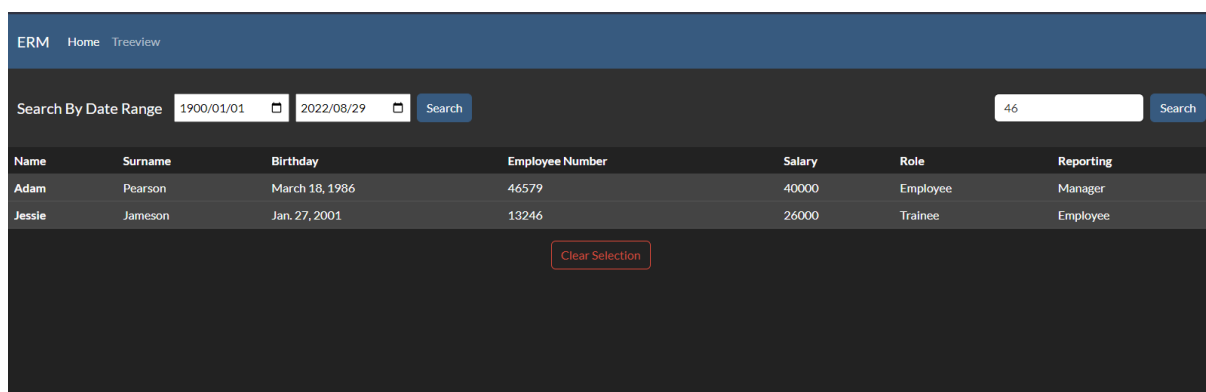
Ex.1) Search Part of an Employee Number

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 like for the full search example above. As shown, the two entries both contain "46" as part of their employee number.

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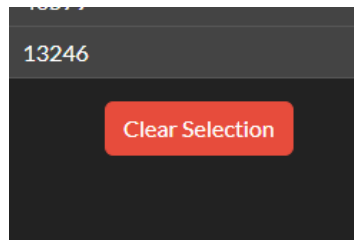
Clicking on the clear selection button will return you to the default homepage view.