

Untitled Solutions

Yuconz

Record Management System Manual

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Permissions

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Logging In and Role Selection

Start Up

Upon start up, an introductory message will be displayed along with the options of logging in and exiting.

```
Welcome to the Yuconz System!  
What would you like to do, your options are:  
1. Login  
2. Exit
```

Enter the number of the option

Upon Logging in you will see all roles available, some of which you might not have the correct permissions for. (These can be found in the Permissions page of 3 in brackets next to the Logging In and Role Selection section of your appropriate position)

```
Please enter the role you wish to login as:  
1. User  
2. Employee  
3. HR Employee  
4. Manager  
5. Director  
6. Reviewer
```

Enter the number of the role

After you select a role, you will be asked to enter a username and password. If the incorrect credentials are used or you do not have the correct permission, the system will tell you.

```
You have selected: 1. User  
Please enter your username:  
ExampleName  
Please enter your password:  
ExamplePassword
```

Enter Username

Enter Password

Upon which a menu will be displayed to you and your login is complete. Please refer to the next page on how to use the menu.

Main Menu and Options

Main Menu

Upon logging, a success message will be displayed along with the options available from the role you logged in with.

```
You have successfully logged in as jdg890 you have Employee permissions.
What would you like to do, your options are:
1. Logout
2. Exit
3. Read your own personal details document
4. Amend your own personal details document
5. Create a new annual review document
6. Read your currently active annual review document
7. Read your past completed annual review documents
8. Sign off on a currently active annual review
```

Role and Username Confirmation

All the options for
you to choose from.

List of Possible Options with which page number to find it:

- Logout
- Exit
- Read your own personal details document (Refer to “Read a personal details document”)
- Amend your own personal details document (Refer to “Amend a personal details document”)
- Create a new personal details document
- Read a personal details document
- Amend a personal details document
- Create a review record
- Read a review record
- Amend a review record
- Read past review records
- Record allocated reviewer
- Sign off review

Logging Out and Exiting

Logging Out

Select the Logout option and the server will log the user out and return to the Login Page without access.

```
You have successfully logged out!  
What would you like to do, your options are:  
1. Login  
2. Exit
```

Exiting

Select the Exit option and the program will send a leaving message and shut down the program.

```
Thank you for using the Yuconz System!
```

Create a New Personal Details Document

Creating a Personal Details Document

Once selected, the system will ask you to fill in all the details of the employee. Upon completion you will go back to the menu page.

```
Please input the ID of the employee who you wish to create a personal details record for.  
ExampleUsername  
Please input a value for Staff No  
ExampleStaffNumber  
Please input a value for Surname  
ExampleSurname  
Please input a value for Name  
ExampleFirstName  
Please input a value for Date of Birth  
DD/MM/YYYY  
Please input a value for Address  
3 Example Road  
Please input a value for Town/City  
ExampleTown  
Please input a value for Post Code  
ML3 2DS  
Please input a value for Telephone Number  
07ExampleNumber  
Please input a value for Mobile Number  
07ExampleMobile  
Please input a value for Emergency Contact  
ExampleContact  
Please input a value for Emergency Contact Number  
ExampleContactNumber
```

Enter the details of the employee
when prompted to do so

Read a Personal Details Document

Reading a Personal Details Document

Once selected, the system will ask for a username (ID) to display the details of. (This prompt will not show if you have selected the option to read your own files) Once filled, it will display all the fields of the personal details document.

```
Please input the ID of the employee whose details you wish to read.  
abc123  
Staff No: 1234  
Surname: Harris  
Name: Sam  
Date of Birth: 1982/12/12  
Address: 28 Dark Lane  
Town/City: Bangle Town  
Post Code: MK5 9LS  
Telephone Number: 09487321582  
Mobile Number: 05748392437  
Emergency Contact: Peter Shoal  
Emergency Contact Number: 01923421543
```

Enter the username of the person
you'd like to see the details of

Details are displayed alongside their field's name

Amend a Personal Details Document

Amending a Personal Details Document

Once selected, the system will ask for a username (ID) to display the details of. (This prompt will not show if you have selected the option to amend your own files) Once filled, it will display all the fields that you can change with their current values. If a field is selected, you will be prompted to enter the new value for the field and once completed will return to all fields once more. When you are ready to finish amending the document, selected the “Stop amending this file” option.

```
Please input the ID of the employee whose details you wish to amend.
abc123
Staff No: 1234
Surname: Harris
Name: Sam
Date of Birth: 1982/12/12
Address: 28 Dark Lane
Town/City: Bangle Town
Post Code: MK5 9LS
Telephone Number: 09487321582
Mobile Number: 05748392437
Emergency Contact: Peter Shoal
Emergency Contact Number: 01923421543

Please select a field to update:
1. Staff No
2. Surname
3. Name
4. Date of Birth
5. Address
6. Town/City
7. Post Code
8. Telephone Number
9. Mobile Number
10. Emergency Contact
11. Emergency Contact Number
12. Stop amending this file
```

Enter the username of the person you'd like to see and amend the details of

Enter the number next to the field you want to update

```
Please input a value for Staff No
ExampleStaffNumber
```

Enter value you want to change the field to

Select the “Stop amending this file” option to finish

Create a Review Record

Creating a Review Record

Once selected, a message saying the process has been started will be sent by the system. Next you will need to amend the record to fill in the details (Page 13) and finally you will need to sign it off. (Page 16)

Review created successfully

Read a Review Record

Read your currently active annual review document

Once the option is selected, all the details of the review will be displayed.

```
Staff No: 4444
Name: %20j0)M6b
Supervisor:
Second Reviewer:
Section:
Job Title:
Recommendation: Recommendation Not Set
A review of past performance: achievements and outcomes
Summary:

A preview of future performance: goals/planned outcomes:
Reviewee Signed:
Supervisor Signed:
Second Reviewer Signed:
```

Read an annual review document

Once the option is selected, you will be prompted with all the reviews of the person you are currently reviewing and once selected, all the details of that review will be displayed.

```
Which review would you like to view?
```

Enter the username of the employee
whose review you'd like to read

Amend a Review Record

Amending a Review Record

Once selected, all the field of the review will be displayed and you will be shown a number next to all the fields you can edit. Once a field is selected, you will be prompted to enter the new value for the field. Once you are finished editing the record, select the stop editing this record option.

```
Staff No: 4444
Name: %20j0)M6b
Supervisor:
Second Reviewer:
Section:
Job Title:
Recommendation: Recommendation Not Set
A review of past performance: achievements and outcomes
Summary:

A preview of future performance: goals/planned outcomes:
Reviewee Signed:
Supervisor Signed:
Second Reviewer Signed:
```

Read Past Review Records

Read all your Past Review Records

Once the option is selected, a list of all your past review records will be displayed and once chosen, the details of the record will be displayed to you. If none are available then it will return a message saying such.

```
Staff No: 4444
Name: %20j0)M6b
Supervisor:
Second Reviewer:
Section:
Job Title:
Recommendation: Recommendation Not Set
A review of past performance: achievements and outcomes
Summary:

A preview of future performance: goals/planned outcomes:
Reviewee Signed:
Supervisor Signed:
Second Reviewer Signed:
Staff No: 4444
Name: %20j0)M6b
Supervisor:
Second Reviewer:
Section:
Job Title:
Recommendation: Recommendation Not Set
A review of past performance: achievements and outcomes
Summary:

A preview of future performance: goals/planned outcomes:
Reviewee Signed:
Supervisor Signed:
Second Reviewer Signed:
```

Record Allocated Reviewer

Record the Allocated Reviewer to a Specific Review

Once selected, the system asks for you to input the username (ID) of the reviewee as well as the username (ID) of the reviewer being allocated to the review.

```
Please input the ID of the employee  
abc123
```

Sign Off Review

Finishing and Signing Off a Review

Once you and your reviewers have finished with your review record, you will need to sign off your record by selecting the option. This will return a success message.

```
Signed off successfully
```