ELLEN COOMBS, QUINN CRAVEN,
WILLIAM BENIUK & DAVID PORTILLO

PRESENT

THE ADMINISTRATOR

USER MANUAL

DURHAM COLLEGE
SUCCESS MATTERS

Table of Contents

Introduction

Thank you for choosing *The Administrator* for your Human Resources management needs.

This guide will take you through all of the features available in *The Administrator* and how to make use of them in your organization. The system itself is split up into Administrator and User roles in order to restrict access to certain parts of the system. This user manual will describe these access levels in further detail in each section.

This manual is broken down into twelve sections, including the nine available features of *The Administrator* and the user interface:

- Login
- Password Reset
- Dashboard
- Sidebar
- Profile
- Employees
- Schedule
- Tasks
- Time Off Requests
- Performance Reviews
- Departments
- Job Titles

Each section may display two possible views based upon whether the user is an Administrator or standard employee user.

The Login Page

The login page is the first page that the user will see when attempting to access *The Administrator* system. It is made up of four main parts:

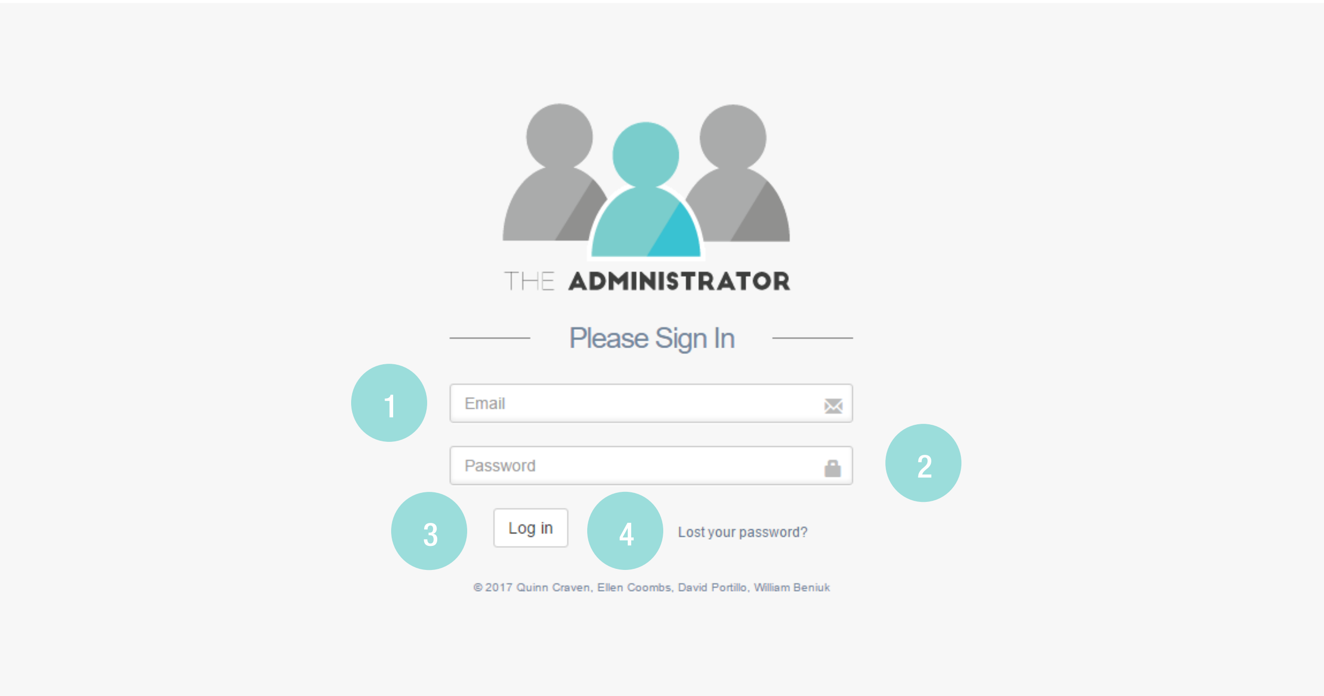


FIGURE 1. LOGIN PAGE

1. **The e-mail field**: Here the user can enter the e-mail address that has been registered with their account.

2. **The password field**: Here the user can enter the password that is associated with their account.

3. **The "Log in" button**: Clicking this button will attempt to log the user in using the credentials entered.

4. **The "lost password" link**: Clicking this link will allow the user to send a password reset e-mail to the e-mail address associated with their account.

The Password Reset Page

Should the user attempting to access the system forget their password, *The Administrator* offers a standard way of resetting their password from an easy-to-use page. This page is made up of three main parts:

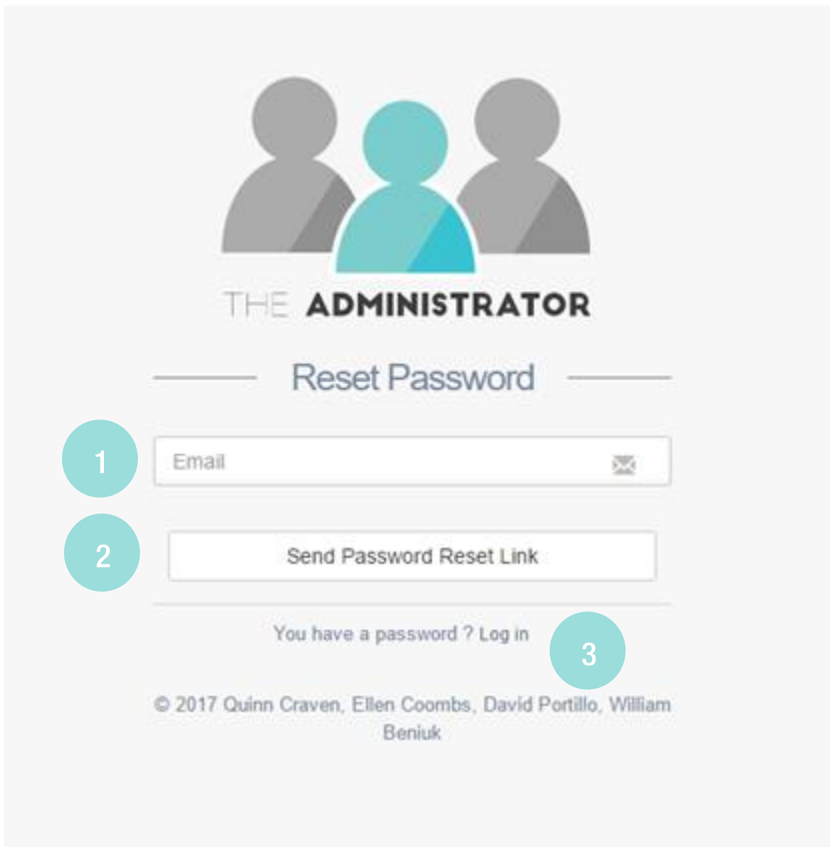


FIGURE 2. RESET PASSWORD

1. **The e-mail field**: In this field, the user can enter the e-mail address associated with their account (this is where the link to reset their password will be sent).

2. **"Send reset link" button**: After entering their e-mail address in the textbox, the user can click this button. The system will then validate that the input e-mail address is associated with an account, and if it is, will either send a reset link or notify the user that the e-mail address does not exist in the system.

3. **The "log in" link**: If the user accidentally arrives on this page, this link will take them back to the login page where they will be able to enter the system.

The Dashboard

Once the user has successfully logged into the system, they will see one of two screens:

Administrator Dashboard

This dashboard enables the Administrator to access any part of the system immediately upon logging in, allowing them to easily find the screen that they need in as few clicks as possible:

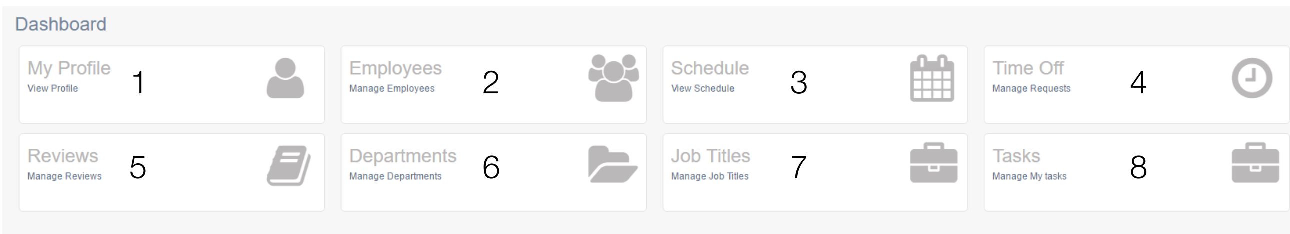


FIGURE 3. ADMINISTRATOR DASHBOARD

The options on the Administrator dashboard are:

1. My Profile: Allows the user to view their own profile.

2. Employees: Redirects the user to the *Manage Employees* page.

3. Schedule: Redirects the user to the *Schedule* page so that they can create and view schedules.

4. Time Off: Allows the user to quickly access the *Time Off* page to view, approve, or reject requests for time off.

5. Reviews: Redirects the user to the *Reviews* page, allowing them to read or create employee reviews.

6. Departments: Redirects the user to the *Departments* page, allowing them to create, edit, or delete departments.

7. Job Titles: Redirects the user to the *Job Titles* page, allowing them to create, edit, or delete job titles from within the organization.

8. Tasks: Redirects the user to the *Tasks* page, allowing them to view all tasks currently assigned to employees and create new tasks.

User Dashboard

This dashboard enables the user to quickly access any of the webpages that they are permitted to access based upon their security setting:

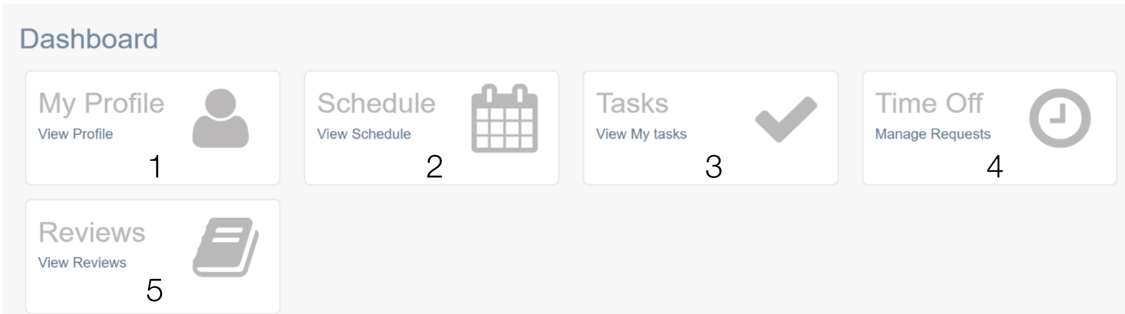


FIGURE 4. USER DASHBOARD

The options on the User dashboard are:

1. My Profile: Redirects the user to the *View Profile* page.

2. Schedule: Redirects the user to the *Schedule* page.

3. Tasks: Redirects the user to the *Tasks* page.

4. Time Off: Redirects the user to the *Request Time Off* page.

5. Reviews: Redirects the user to *the Performance Reviews* page.

The Sidebar

When the user logs into the system they will have access to the sidebar, which provides the main form of navigation within *The Administrator*. The sidebar will change based upon the level of access of the specified user, giving them different menu and screen options.

Administrator Sidebar

If the user is an Administrator, when they log in they will be able to view a sidebar allowing them access to all parts of the system. The Administrator sidebar is broken down into two tabs and seven dropdowns, each with two options, and four buttons on the bottom:

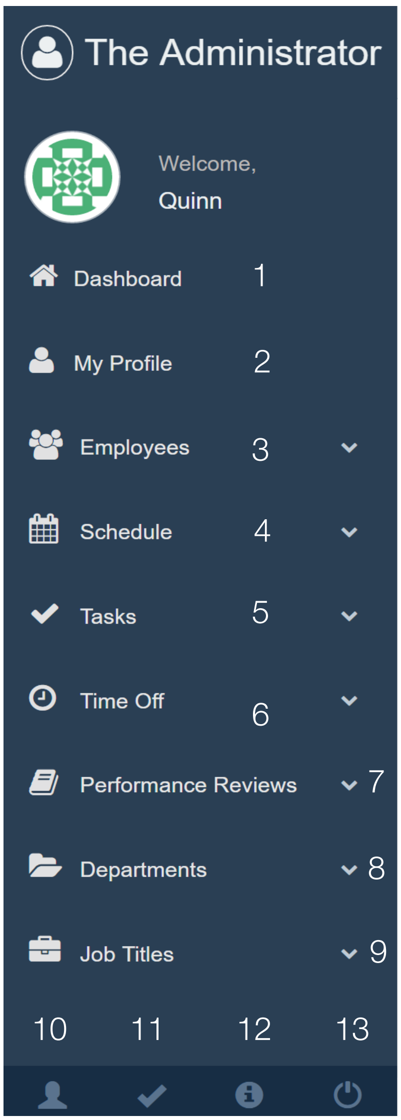


FIGURE 5. ADMINISTRATOR DASHBOARD

Buttons

1: Redirects the user to their dashboard screen.

2: Redirects the user to their profile screen.

Footer Buttons

10: Takes the user directly to their profile.

11: Takes the user to the *Manage Tasks* page.

12: Takes the user to the website's *About* page.

13: Logs the user out of the system.

Dropdowns

3: This dropdown menu will provide the user with two employee options:

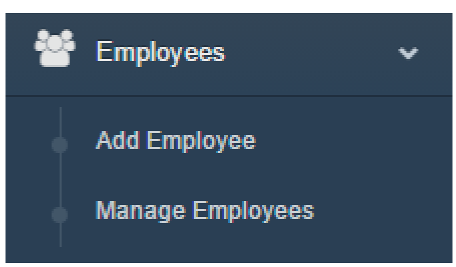


FIGURE 6. EMPLOYEES DROPDOWN

- Add Employee: Redirects the user to the *Create Employee* page
- Manage Employees: Redirects the user to the *Manage Employees* page

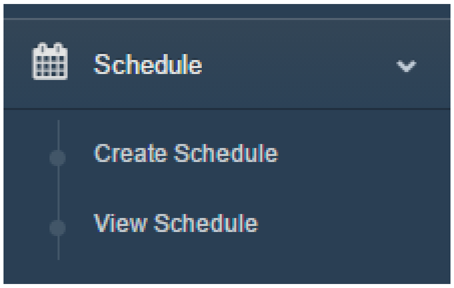


FIGURE 7. SCHEDULE DROPDOWN

4: This dropdown menu will provide the user with two scheduling options:

- Create Schedule: Redirects the user to the *Create Schedule* page
- View Schedule: Redirects the user to the *Schedule* page

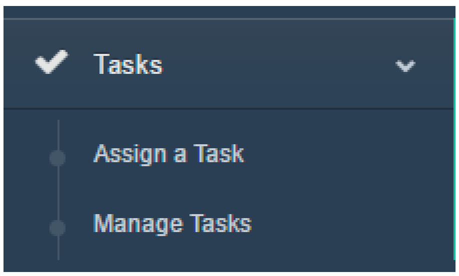


FIGURE 8. TASKS DROPDOWN

5: This dropdown menu will provide the user with two task options:

- Assign a Task: Redirects the user to the *Assign a Task* page
- Manage Tasks: Redirects the user to the *Manage Tasks* page

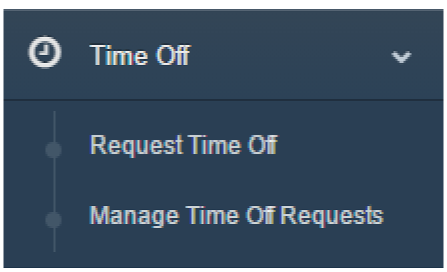


FIGURE 9. TIME OFF DROPDOWN

6: This dropdown will provide the user with two time off options:

- Request Time Off: Redirects the user to the *Request Time off* page
- Manage Time Off Requests: Redirects the user to the *Manage Time Off Requests* page

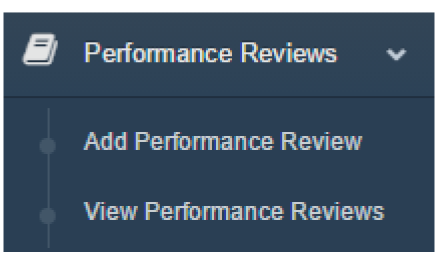


FIGURE 10. PERFORMANCE REVIEWS DROPDOWN

7: This dropdown will provide the user with two performance review options:

- Add Performance Review: Redirects the user to the *Add Performance Review* page
- View Performance Reviews: Redirects the user to the *Manage Performance Reviews* page

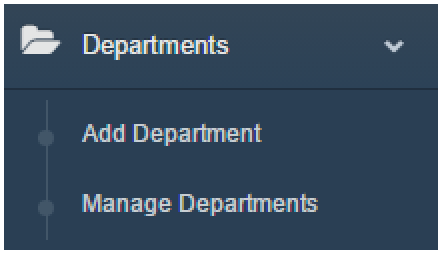


FIGURE 11. DEPARTMENTS DROPDOWN

8: This dropdown will provide the user with two department options:

- Add Department: Redirects the user to the *Add Department* page
- Manage Departments: Redirects the user to the *Manage Departments* page

FIGURE 12. JOB TITLES DROPDOWN

9: This dropdown will provide the user with two Job Titles options:

- Add Job Title: Redirects the user to the *Add Job Title* page
- Manage Departments: Redirects the user to the *Manage Job Titles* page

User Sidebar

When the user first logs into the system, they will be able to view their dashboard and sidebar. The user sidebar varies from the Administrator sidebar due to the fact that there is only one dropdown, and less content is featured, due to their restricted security settings. The four buttons on the bottom of the sidebar also change to reflect their specific access:

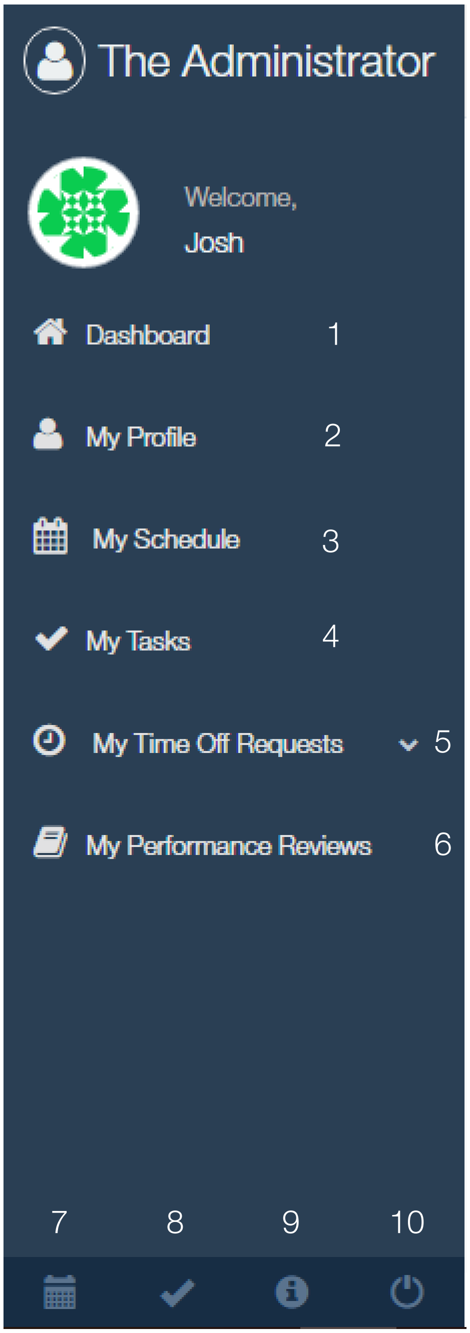


FIGURE 13. USER DASHBOARD

Buttons

1: Redirects the user to their dashboard screen.

2: Redirects the user to their profile screen

3: Redirects the user to the *Schedule* page.

4: Redirects the user to the *My Tasks* page.

6: Redirects the user to the *My Performance Reviews* page.

Footer Buttons

7: This button will take the user directly to the *Schedule* page.

8: This button will take the user directly to the *Manage Tasks* page.

9: This button will take the user to the website's *About* page.

10: This button will log the user out of the system.

Dropdowns

5: This dropdown menu will provide the user with two employee options similar to the Administrator dropdown for Time Off Requests:

- Request Time Off: Redirects the user to the *Request Time Off* page
- View Status of Requests: Redirects the user to the *My Time Off Requests* page

Profile

When the user selects the *View Profile* link, they will be taken to the *View Profile* page. This page will display all information that is currently on file for the user. Only an Administrator can make changes to a user's profile, so the "Edit Profile" button is only visible in the Administrator user view:

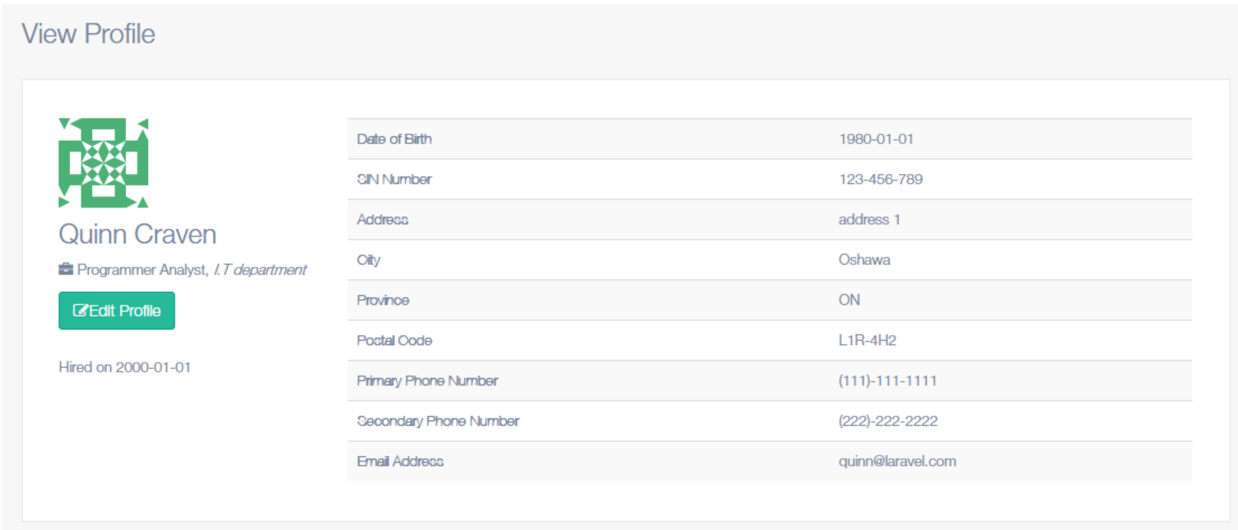


FIGURE 14. USER PROFILE PAGE

Edit Profile

If the user is an Administrator and they click the “Edit Profile” button, they will be taken to the *Edit Profile* page. This page will be loaded with all data for the selected user. When the Administrator edits the information on the page and clicks the “Submit” button, the page will validate that all fields contain appropriate text and will then display any errors, or save the changes. The page also contains a reset button so that the user can reset the page to the original information if a mistake is made:

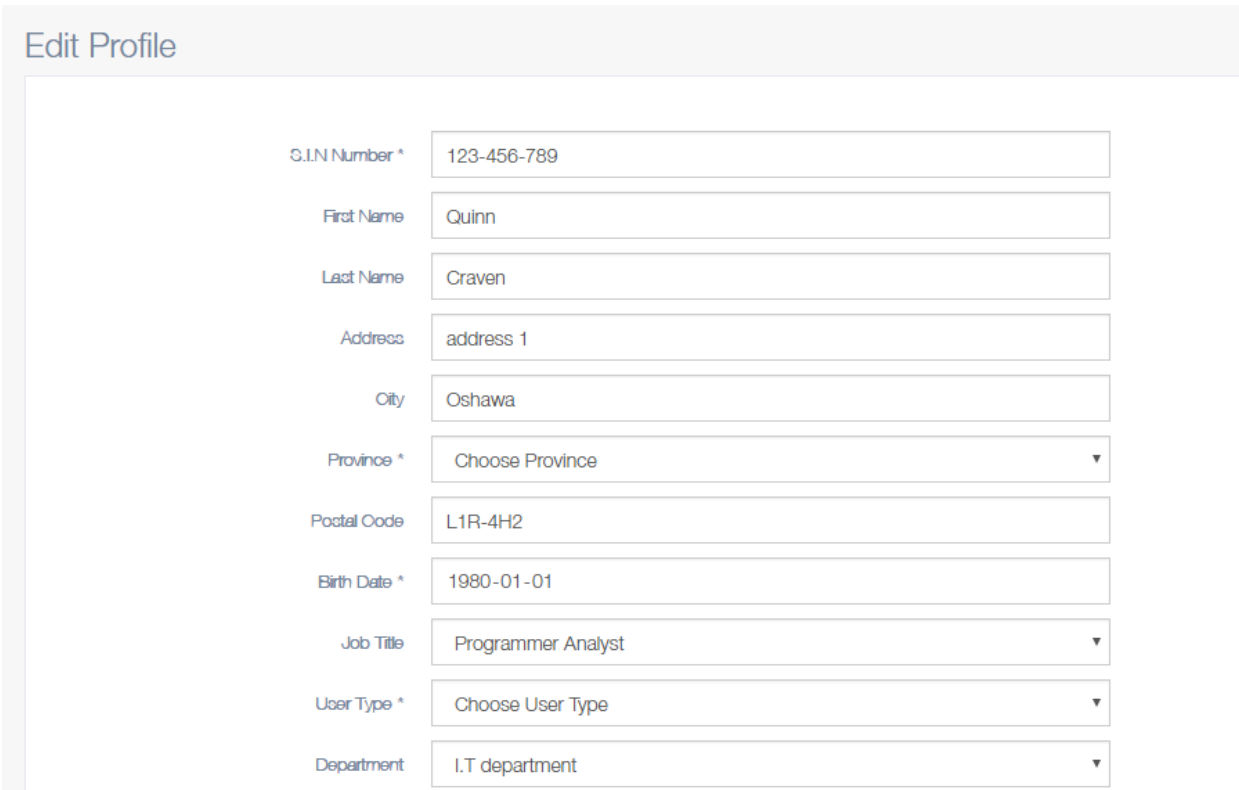


FIGURE 15. EDIT PROFILE PAGE

Employee Management

If the user is logged in as an Administrator, they will have access to the **Employees** tab on their sidebar. This will allow the user to visit either the *User Management* or *Create Users* pages to maintain the employees in the system.

Manage Employees

The *User Management* page displays a list of all users in the system, along with all of their relevant information. The Administrator will have the ability from this page to access the *Create User* page, as well as to visit a specific user's employee profile, search for a user, and disable/enable/delete a user's account. The *User Management* page contains six main features:

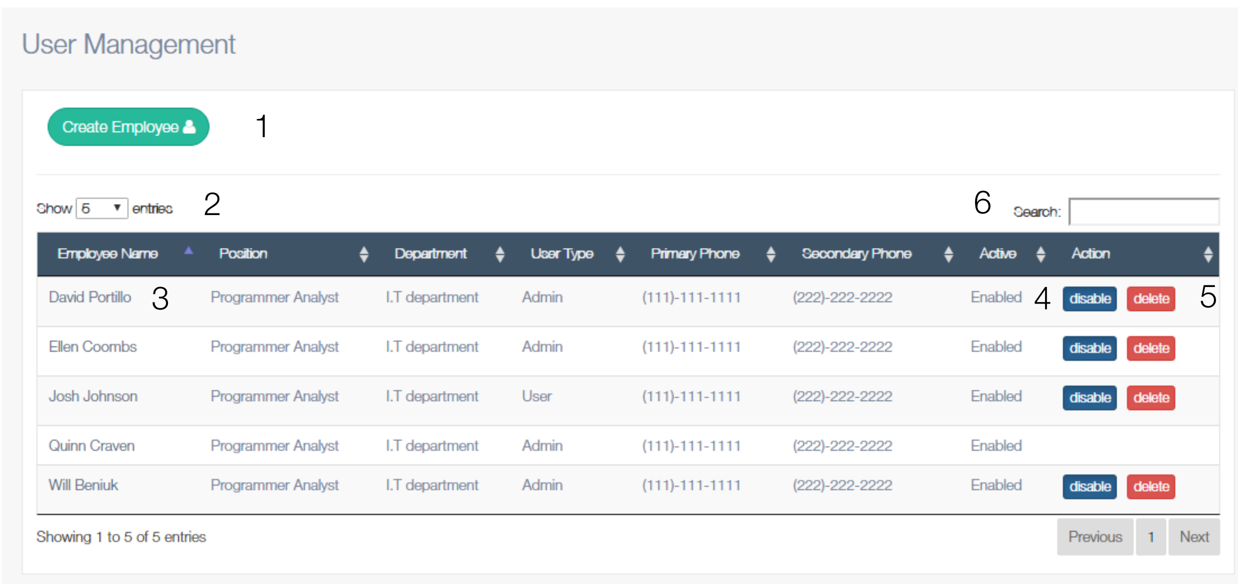


FIGURE 16. USER MANAGEMENT

1: **"Create Employee" Button**: Redirects the user to the *Create Employee* page.

2: Allows the user to select how many employees they would like to view per page.

3: Clicking on the user's name will bring the user to the *View Profile* page for that user, where they can select the "Edit Profile" button to update their profile if needed.

4: "**Disable/Enable**" **Button**: Disables or enables a user's account (NOTE: If the user is currently logged into the system, they will immediately be redirected to the login screen the next time they load the page).

5: “Delete” Button: Deletes the user from the system entirely (NOTE: This action is not recommended and is only available to Administrators).

6: Allows the user to search the system for users by name, to make locating a user more efficient.

Create a User

When the user is logged into the system as an Administrator, they have the ability to add new users to the system. When they access the *Create User* page, a form will be available for them to enter all necessary information to create a profile and account for a new user to the system.

The form is made up of eleven text boxes, one date picker, four dropdown menus, and three buttons:

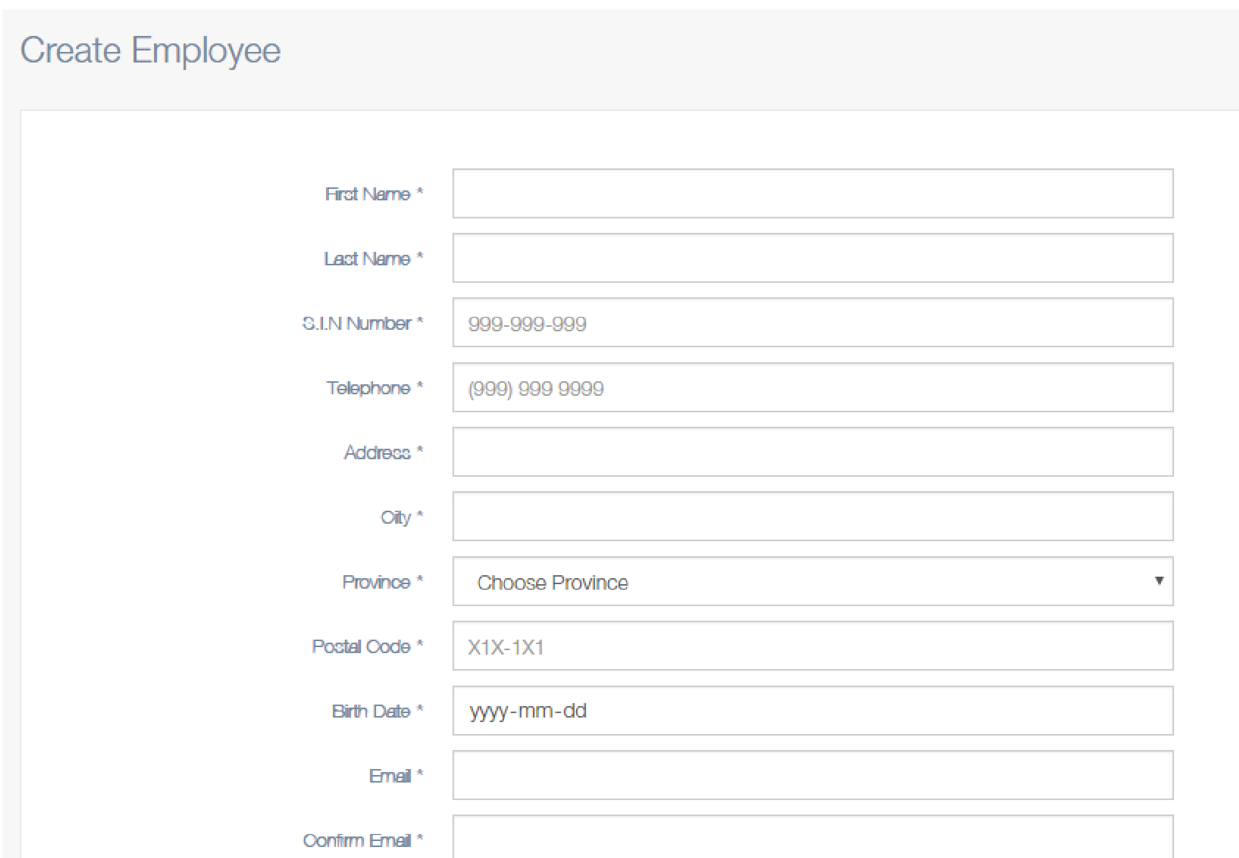


Figure 17. Create Employee page

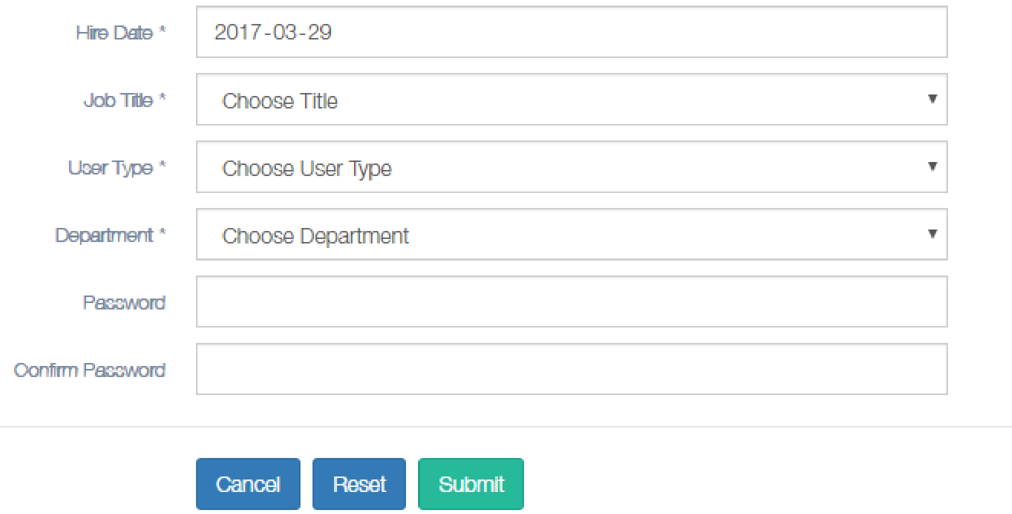


FIGURE 18. CREATE EMPLOYEE PAGE (CONTINUED)

Required Fields

1: The employee’s first name (NOTE: Minimum of 3 characters).

2: The employee’s last name (NOTE: Minimum of 3 characters).

3: The employee’s Social Insurance Number (SIN).

4: The employee’s telephone number.

5: The employee’s address (NOTE: Minimum of 5 characters).

6: The employee’s city.

7: The employee’s province.

8: The employee’s postal code.

9: The employee’s date of birth.

10: The employee’s e-mail address.

11: Confirmation of the employee’s e-mail address (NOTE: Both fields 10 and 11 must be identical).

12: The employee’s hire date (NOTE: This field is auto-filled with the current date).

13: Select the employee’s job title.

14: Select the employee’s user type (NOTE: Only an Administrator can assign another user to the Administrator type).

15: Select the employee’s department.

16: The employee’s password.

17: Confirmation of the employee’s password (NOTE: Fields 16 and 17 must be identical).

18: “Cancel” button: Returns the user to the *User Management* page.

19: “Reset” button: Clears all fields and returns the form to its original state.

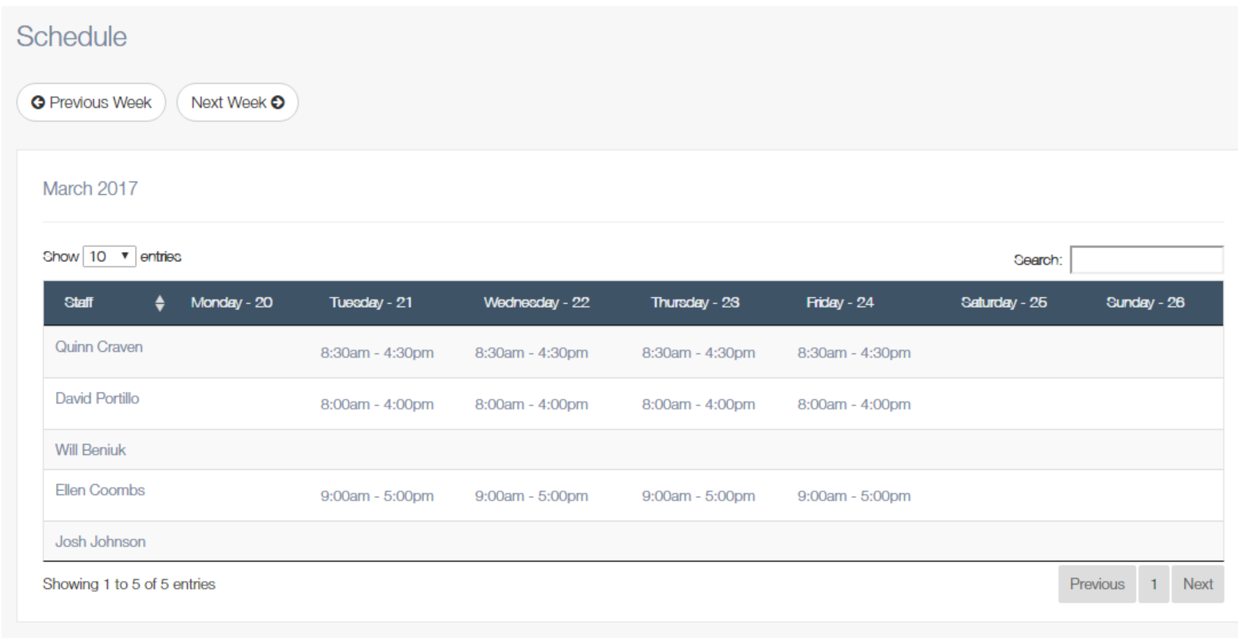
20: “Submit” button: Saves the user to the system (NOTE: Before completing the save, the system will validate all entry to ensure correct information. Any errors must be fixed before the employee will be permitted to be created in the system).

Schedules

All users logged into the system have access to their work schedules. Users can only view schedules, while Administrators have the ability to create schedules for users.

View the Schedule

When any type of user visits the *Schedule* page by clicking the **Schedule** (for Administrators) or **My Schedule** (for employees) link in the sidebar, they can view the schedule for all users in the system:



Staff	Monday - 20	Tuesday - 21	Wednesday - 22	Thursday - 23	Friday - 24	Saturday - 25	Sunday - 26
Quinn Craven		8:30am - 4:30pm	8:30am - 4:30pm	8:30am - 4:30pm	8:30am - 4:30pm		
David Portillo		8:00am - 4:00pm	8:00am - 4:00pm	8:00am - 4:00pm	8:00am - 4:00pm		
Will Beniuk							
Ellen Coombs		9:00am - 5:00pm	9:00am - 5:00pm	9:00am - 5:00pm	9:00am - 5:00pm		
Josh Johnson							

FIGURE 19. SCHEDULE

From here, the user can view the shift times for each applicable date in the table, and has the ability to navigate forwards and backwards through the schedule in order to view the schedule for a past or upcoming week by clicking the "Previous Week" and "Next Week" buttons. In addition, they can search the schedule for a specific employee.

Create a Schedule

Administrators have the ability to create schedules via the *Create Schedule* link in the **Schedules** tab. When creating a schedule, the Administrator will be presented with the following form, made up of six features:

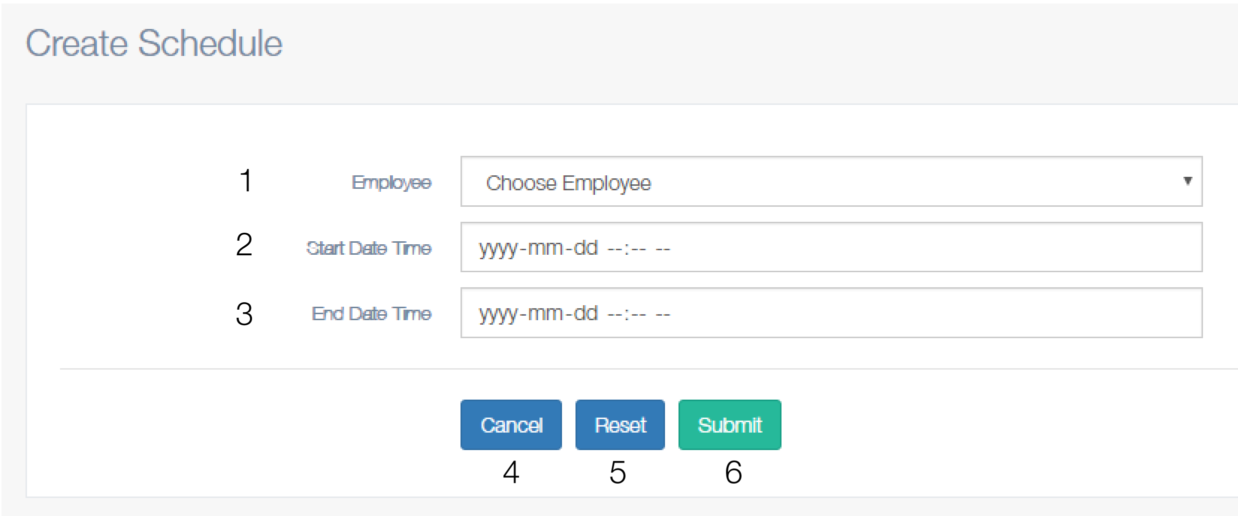


FIGURE 20. CREATE SCHEDULE PAGE

1: **Employee dropdown**: Allows the user to select the desired employee.

2: Start date and time for the employee.

3: End date and time for the employee.

4: "**Cancel" button**: Returns the user to the *Schedule* page.

5: "**Reset" button**: Resets the form to its default (blank) state.

6: "**Submit" button**: Upon click, saves the entered information to the schedule upon successful validation.

Scheduling & Time Off Requests

When creating a schedule, the user may have previously submitted a time off request for the given day; if this is the case, a notification will appear below the form, alerting the Administrator to the request, as well as its status, in order to ensure that staff are not scheduled on requested days off.

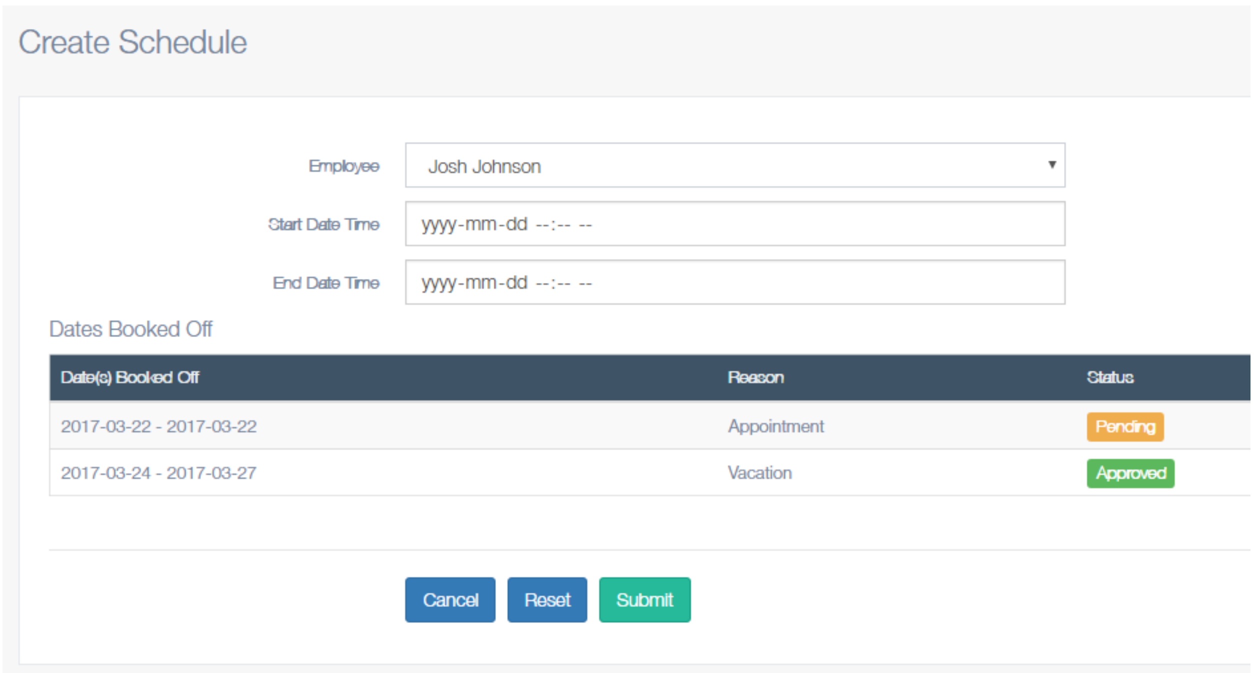


FIGURE 21. SCHEDULING CONFLICTS POPUP

Tasks

In order to simplify the process of keeping track of employees' work, *The Administrator* allows Administrators to create and assign tasks to specific users, who are then able to manage their own lists of tasks.

Create a Task

To create a task, the Administrator must simply navigate to the **Tasks** dropdown and select *Assign a Task.* This will load a simple form containing a dropdown to select an employee, textboxes to enter a task name and task details, and a date picker to select the desired completion date.

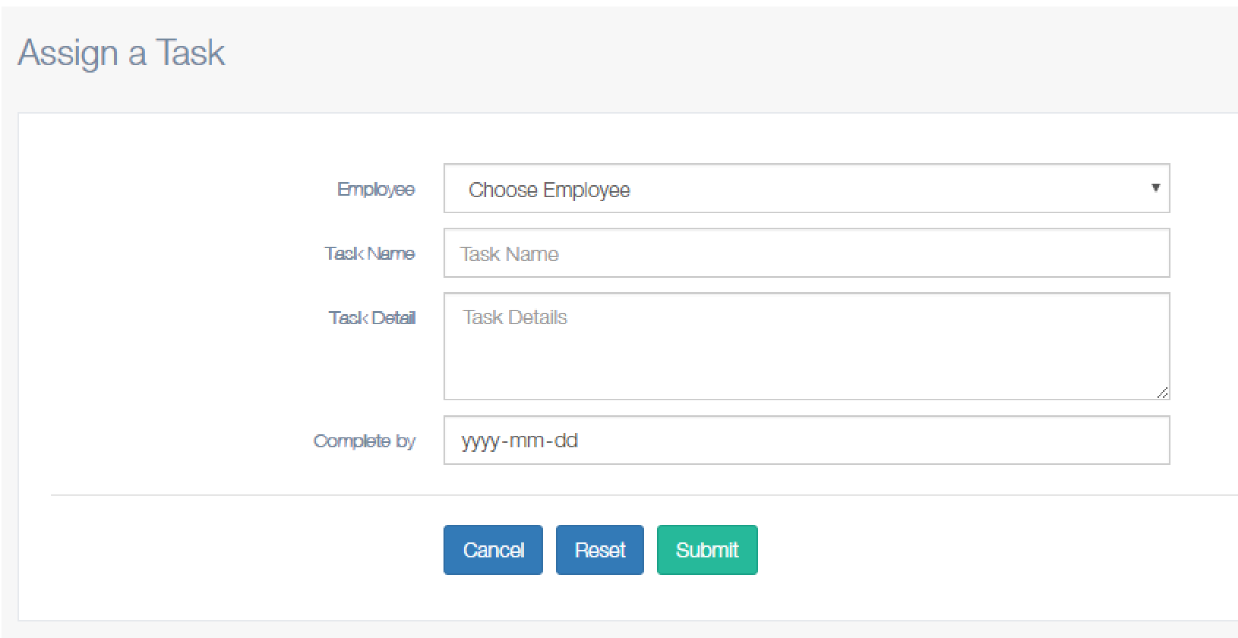


FIGURE 22. ASSIGN A TASK

After filling out all fields, the Administrator can click the "Submit" button in order to submit the task for later examination by an employee.

View a Task

Administrators

To access the task list, Administrators must click on the **Tasks** link in the sidebar and then on **Manage Tasks**. Two lists will appear, the first featuring a list of tasks that have been assigned to the Administrator, and the next featuring a list of tasks that the logged-in user has assigned to other employees. Information displayed includes task name, description, and target completion date, as well as how much time they have left to complete the task, and who issued the task. Task status is also highlighted for easy access.

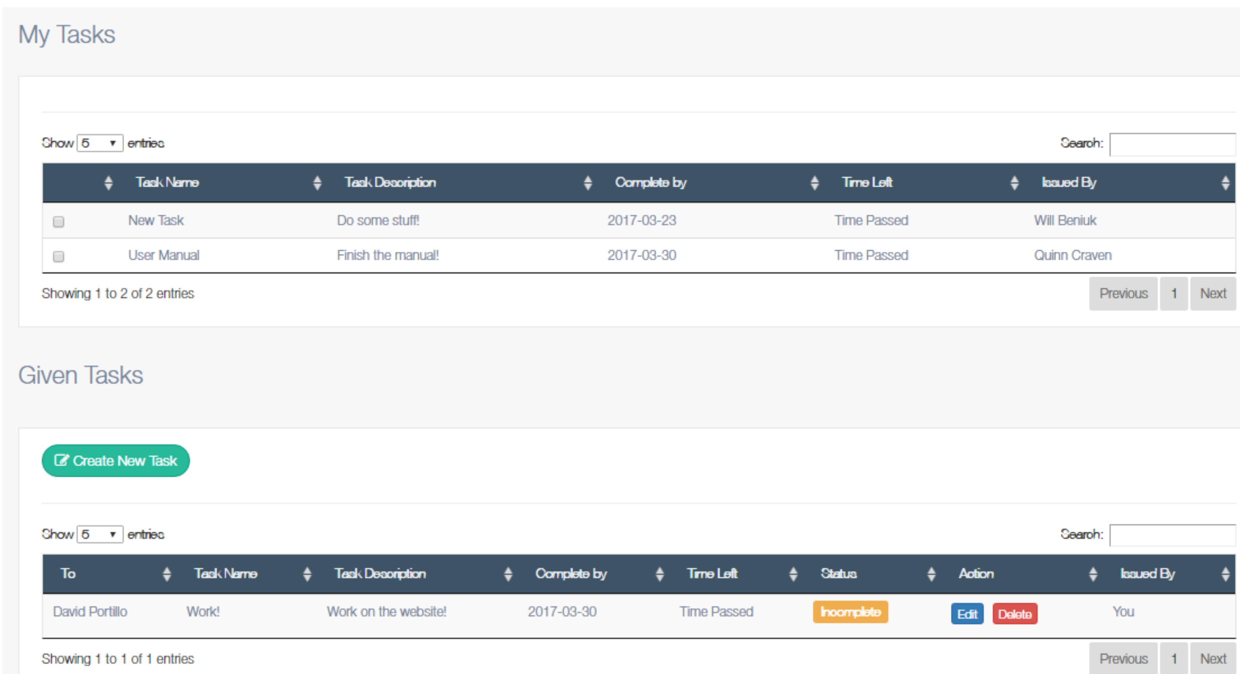


FIGURE 23. ADMINISTRATOR TASK LISTS

Users

To access the tasks that have been assigned to them, users must simply click the My Tasks link in the sidebar, where they will be greeted with a page listing all tasks that they must complete and featuring the same information as the "My Tasks" list in the Administrator view.

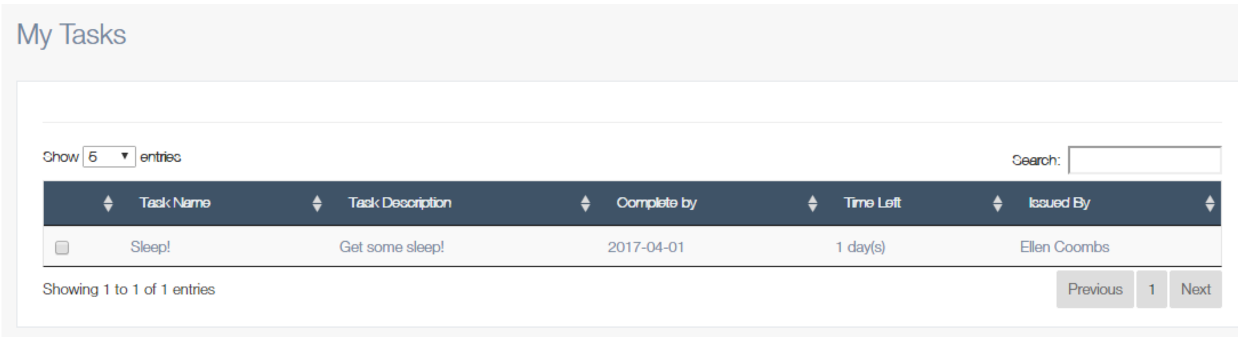


FIGURE 24. USER TASKS

Time Off Requests

All users in the system have the ability to submit requests for time off. These requests will initially be saved with a status of “Pending” until an Administrator has reviewed the request and made the decision to either approve or reject it.

Create a Time Off Request

To create a time off request, the user must simply navigate to the **Time Off Requests** dropdown and select *Request Time Off*. This will load a simple form containing only three fields and three buttons:

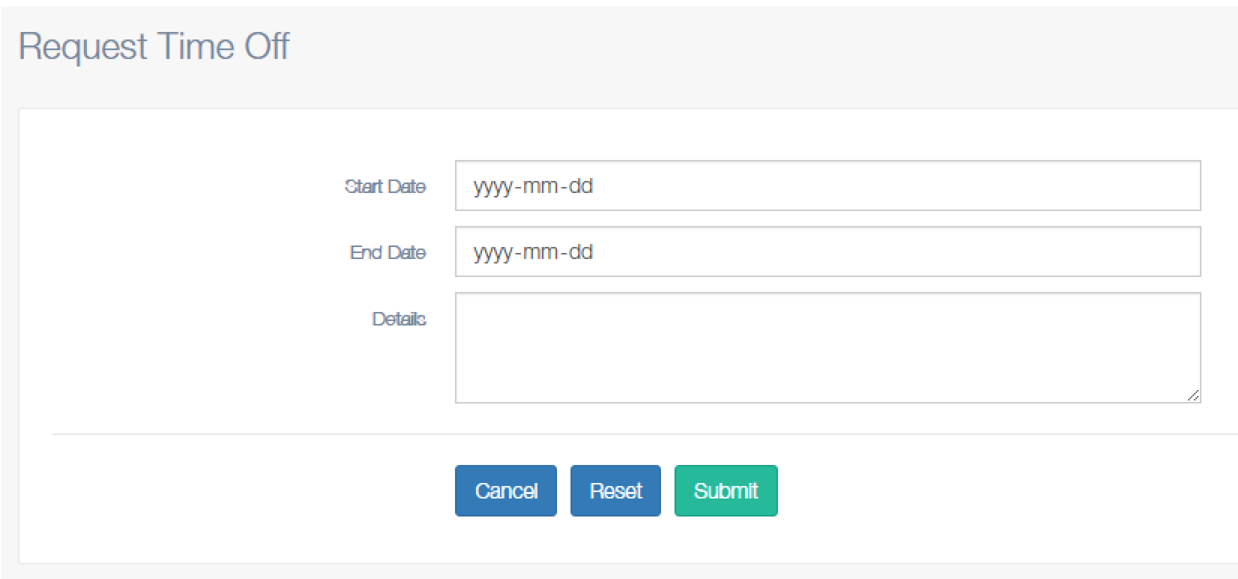


FIGURE 25. REQUEST TIME OFF

After selecting a desired start and end data as well as details surrounding the request, the user can click the “Submit” button in order to submit the request for later review by an Administrator.

View the Status of Time Off Requests

Users

To view the status of a request as a regular employee, return to the **Time Off** dropdown and select *View Status of Requests*; this will load a new page displaying a summary of their requests including their statuses (highlighted for ease of identification).

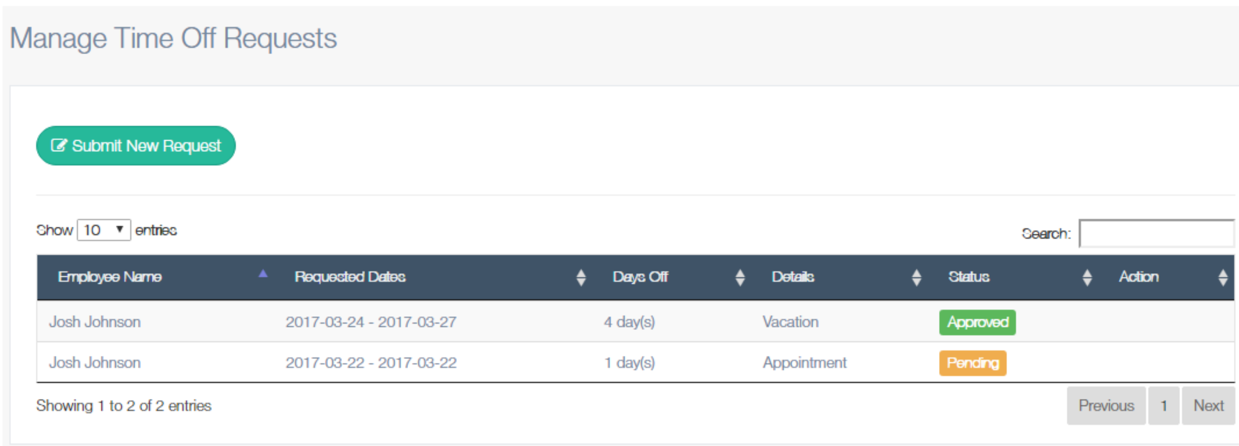


FIGURE 26. VIEWING TIME OFF REQUESTS

Administrators

When an Administrator accesses the *Manage Time Off Requests* page, it will load all submitted requests for their review, with the newest submissions at the top. The page appears identical to that of the user's *Manage Time Off Requests* page, with the exception of the addition of the "Approve" and "Reject" buttons in the Action field, which will allow them to approve or reject a time off request with the click of a button (NOTE: Even Administrators do not have the ability to approve or deny their own time off requests).

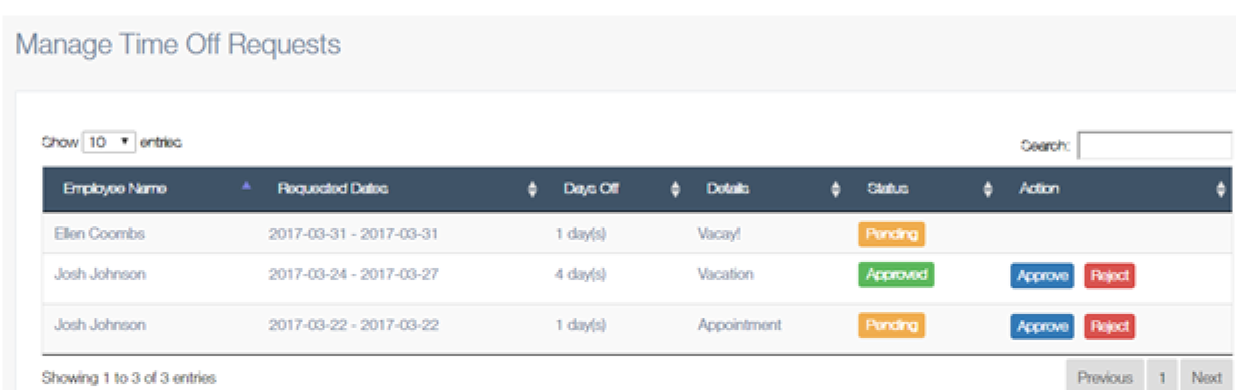


FIGURE 27. ADMINISTRATOR VIEW OF TIME OFF REQUESTS

Performance Reviews

Another feature of *The Administrator* is the creation and cataloguing of all performance reviews within the system. This feature allows Administrators to create and read performance reviews for all users, while giving users access to their own performance reviews, in order to reflect and maintain performance growth.

View Performance Reviews

Users

Users have the ability to review their own past performance reviews, allowing them to reflect on any areas of improvement in order to help them grow and improve their performance within the company. To view performance reviews, employees simply need to click *My Performance Reviews* from the sidebar, which will load a page featuring their reviews:

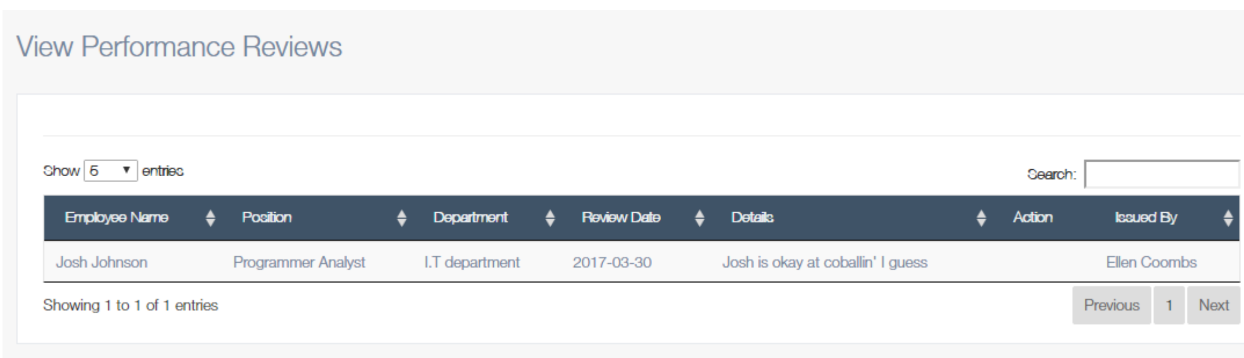


FIGURE 28. PERFORMANCE REVIEWS

In addition to the review itself, the employee is able to view their position, department, the date the review was written, and who wrote the review.

Administrators

Administrators can create, edit, and delete the reviews of any user in the system through the *View Performance Reviews* page accessed under the **Performance Reviews** dropdown menu in the sidebar:

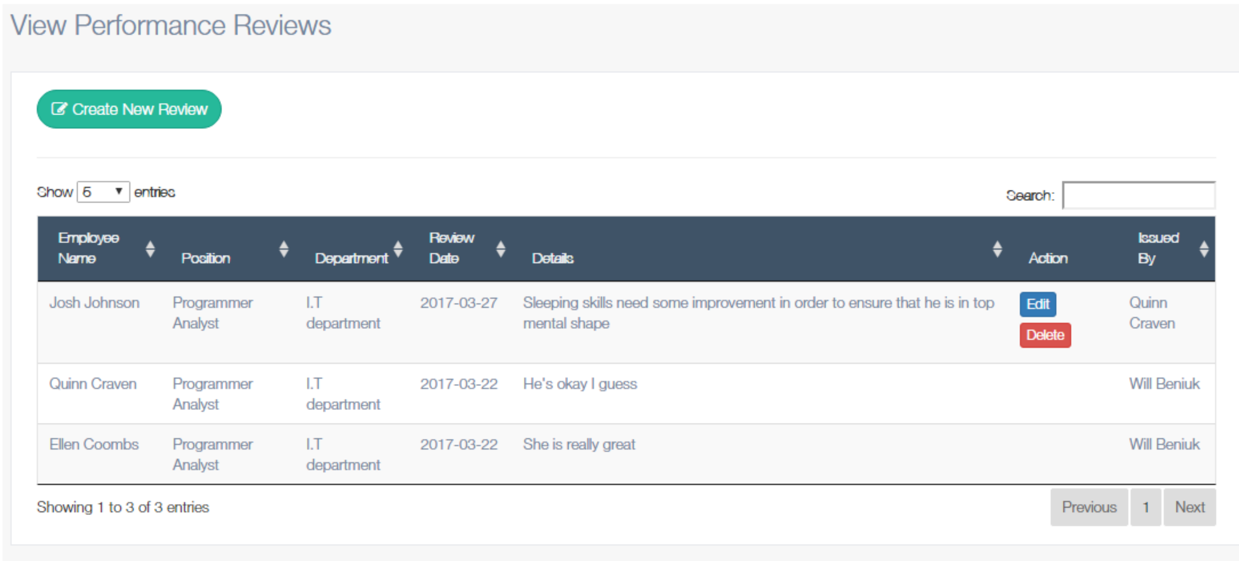


FIGURE 29. ADMINISTRATOR VIEW OF PERFORMANCE REVIEWS

Edit Performance Reviews

Should the need arise, an Administrator can edit a performance review via the *View Performance Reviews* page by clicking on the "Edit" button. This will create a popup featuring a textbox in which the user can edit the text of the review and save it to the system:

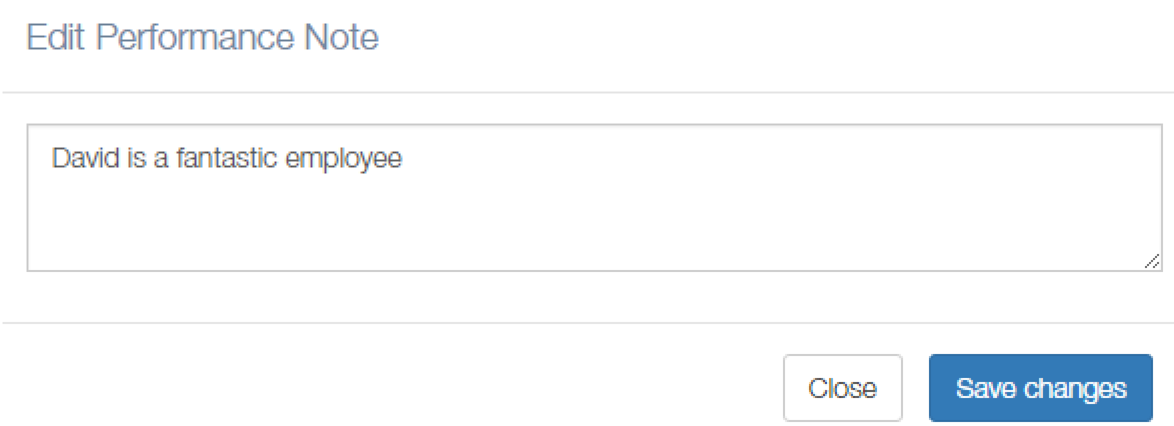


FIGURE 30. EDIT PERFORMANCE NOTE POPUP

Delete Performance Reviews

Administrators also have the ability to delete performance reviews via the *View Performance Reviews* page by clicking on the "Delete" button, which will remove the review from the system.

Create a Performance Review

To create a performance review, the Administrator can select either the *Add Performance Review* button under the Performance Reviews dropdown on the sidebar, or click the "Create New Review" button on the *View Performance Reviews* page. When the Administrator selects this option, it will load a page featuring a form:

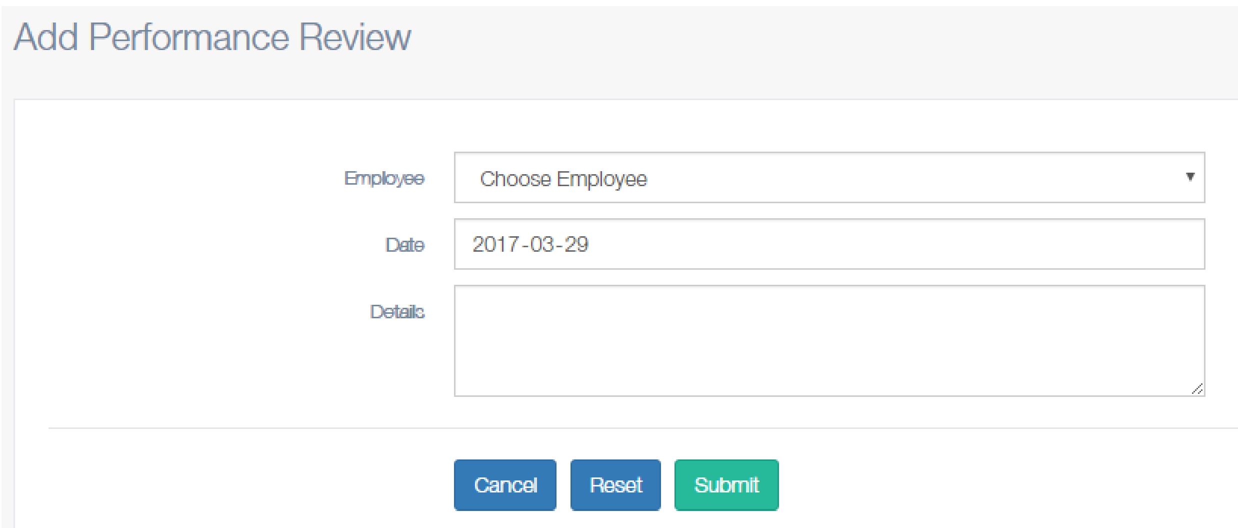


FIGURE 31. CREATE PERFORMANCE REVIEW PAGE

To create a performance review, simply click on the dropdown menu and select the name of the employee for whom you wish to create the review. The date box is automatically filled in with today's date. From there, the details of the review can be expanded upon. When complete, clicking the "Submit" button will save the review to the system for review by the employee and other Administrators.

Departments

As a business evolves, there may be a need to develop new departments, merge two departments together, or eliminate one or more departments. This process is simplified using the **Departments** menu, which easily allows a department to be created, edited, or deleted from one simple page (NOTE: Only Administrators may access this section of the website).

Manage Departments

Managing departments has never been easier, as you simply need to click on *Manage Departments* from the sidebar in order to display a page that lists all departments that currently exist in the system, including details such as how many users are currently part of that department. From here it is easy to edit and delete a department, or even create a new one at just the click of a button.

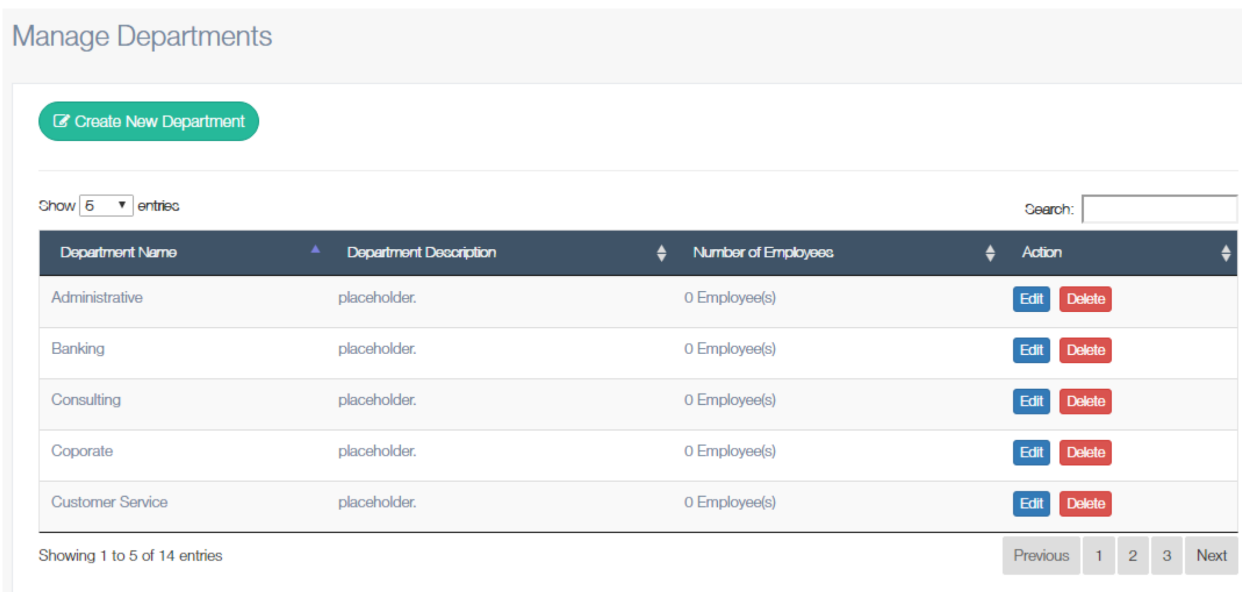


FIGURE 32. VIEW DEPARTMENTS PAGE

Create a Department

Creating a department is simple, and can be done by simply clicking on the "Create New Department" button on the *Manage Departments* page, or by selecting the Add Department option from the Departments menu on the sidebar. Both options will redirect the user to the Add Department page, where they can enter a department name and description. Once the user clicks the "Submit" button, the new department will be created.

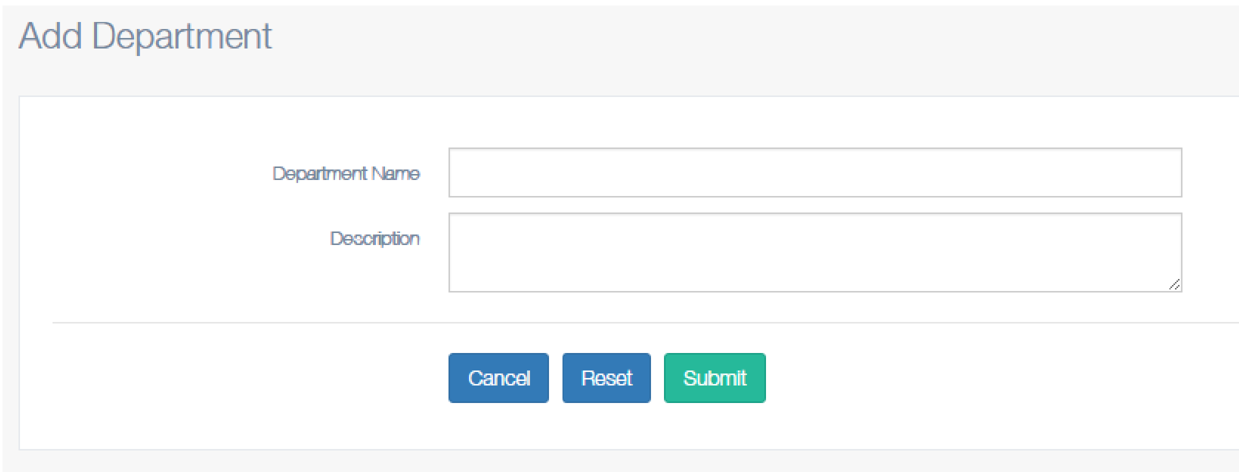


FIGURE 33. ADD DEPARTMENT PAGE

Edit a Department

To edit a department, on the *Manage Departments* page, simply click on the "Edit" button and a popup will appear featuring the current department title and description in textboxes. Clicking the "Save" button will save the changes, and clicking the "Cancel" button will close the popup.

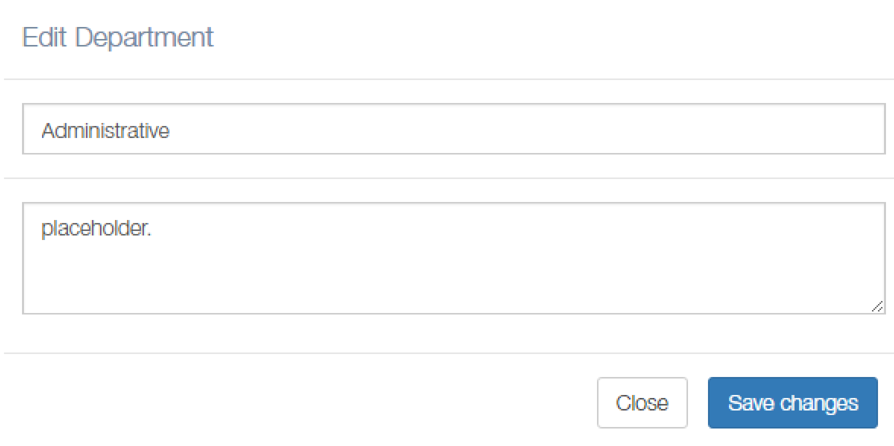


FIGURE 34. EDIT DEPARTMENT POPUP

Delete a Department

To delete a department, on the *Manage Departments* page, simply click on the “Delete” button and a popup will appear confirming your wish to delete the department and the department will be removed from the system. Clicking the “Delete” button will delete the department from the system, and clicking the “Cancel” button will close the popup.

Job Titles

In addition to the development of new departments within a company, there may also be a need to make modifications to job titles within the system. The Job Titles menu provides easy access to the creation and maintenance of job titles (NOTE: Only Administrators may access this section of the website).

Manage Job Titles

To manage job titles, click on *Manage Job Titles* from the **Job Titles** sidebar in order to display a page that lists all job titles that currently exist in the system, including details such as how many users are currently working under that job title. From here it is easy to edit and delete a job title, or even create a new one at just the click of a button.

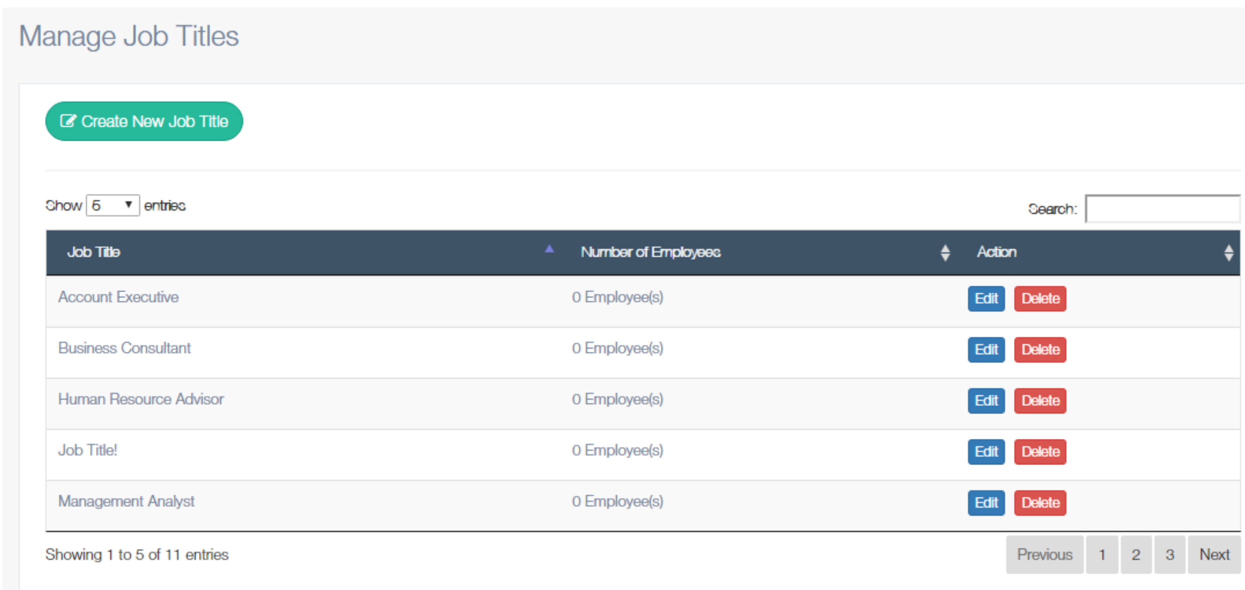


FIGURE 35. VIEW JOB TITLES PAGE

Create a Job Title

Creating a job title is simple, and can be done by simply clicking on the “Add Job Title” button on the *Manage Job Titles* page, or by selecting the Add Job Title option from the Job Titles menu on the sidebar. Both options will redirect the user to the *Add Job Title* page, where they can enter a job title. Once the user clicks the “Submit” button, the new job title will be created.

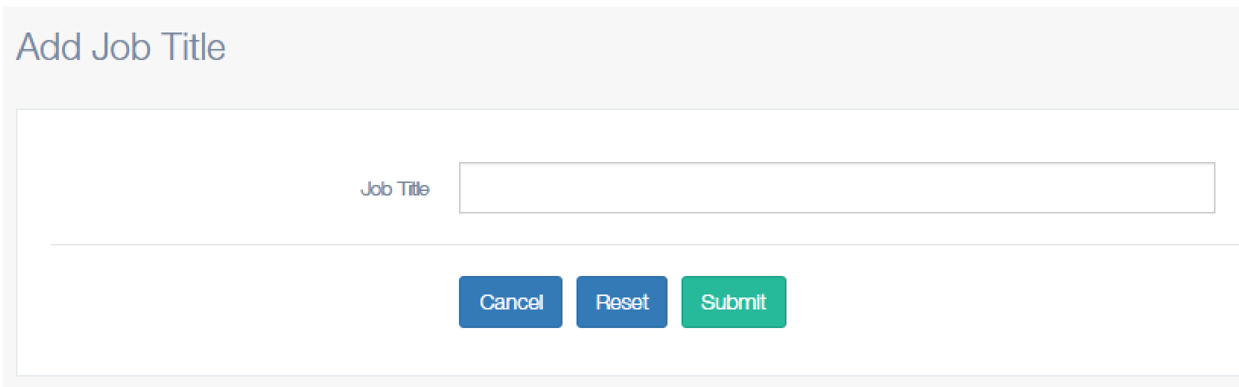


FIGURE 36. ADD JOB TITLES PAGE

Edit a Job Title

To edit a job title, on the *Manage Job Titles* page, simply click on the “Edit” button and a popup will appear featuring the current job title in a textbox. Clicking the “Save” button will save the changes, and clicking the “Cancel” button will close the popup.

FIGURE 37. EDIT JOB TITLE POPUP

Delete a Job Title

To delete a job title, on the *Manage Job Titles* page, simply click on the “Delete” button and a popup will appear confirming your wish to delete the job title. Clicking the “Delete” button will delete the job title from the system, and clicking the “Cancel” button will close the popup.