

Employee Management System

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Bacon Software Employee Management System

by Bacon Software

The Bacon Software Employee Management System provides a table driven automated method to maintain all records related to company employees and job positions in your company.

Employee Management System

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Table of Contents

Foreword	0
Part I Product Information	6
1 Overview.....	6
2 Login	6
3 Main Menu.....	7
4 Employee Action Manager.....	8
5 Report Manager.....	12
6 Maintenance.....	12
7 Performance Review.....	13
Part II Using the Employee Manager System	14
1 Maintenance Functions.....	14
Setting Up System Users	14
Setting Up Departments	15
Module Parameters	16
Batch Routines	17
2 Employees.....	19
Create/Update Employees	19
Assigning Job Positions to Employees	22
Create/Update Employee Performance Appriasals	23
Create/Update Employee Training Events	26
3 Job Positions.....	29
Create/Update Job Positions	30
Define Training Requirements for Job Positions	32
Define Performance Appraisal Requirements for Positions	33
Attaching Documents to Job Positions	33
Part III Employee Performance Reviews	34
1 Conducting Employee Reviews.....	34
Part IV Training Events	36
1 Conducting Employee Training.....	36
Part V Print Documents	37
Part VI Reports	38
Part VII What's New	40
1 What's New Version D12.....	40
2 What's New Release 1.....	40

Index**0**

1 Product Information

1.1 Overview

Overview

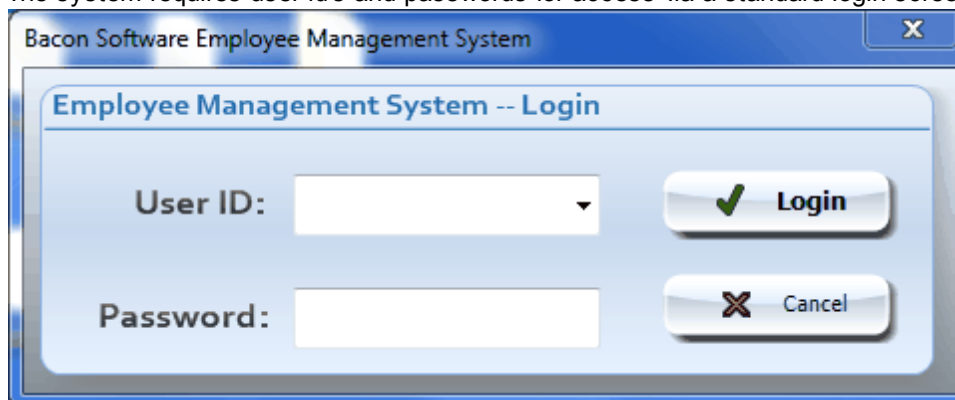
[Top](#) [Next](#)

The Bacon Software Employee Management system is a table driven system for company employee related functions including:

1. Basic Employee Information--Hire Date, review dates, etc.
2. Employee Performance Review input and tracking.
3. Company Job List with links to attachments for employee work instructions.
4. Employee training records/check list indicating the training each employee has received, is in the process of receiving, or brings to the job from prior employers. This includes the ability to set expiration dates on training for certification renewals, external training etc. that can be used as triggers for email alerts, etc.
5. Features to allow Managers to view information on the employees in their departments.
6. Ability to view a employee and all job descriptions the employee is trained for.
7. Ability to view a job description and all employees trained for it.
8. "Grey Area" feature that indicates which employees are nearly qualified for a position. This can be used in emergency situations where the normal employee is not available.
9. Email Notification of upcoming events and reminders.
10. More...

1.2 Login

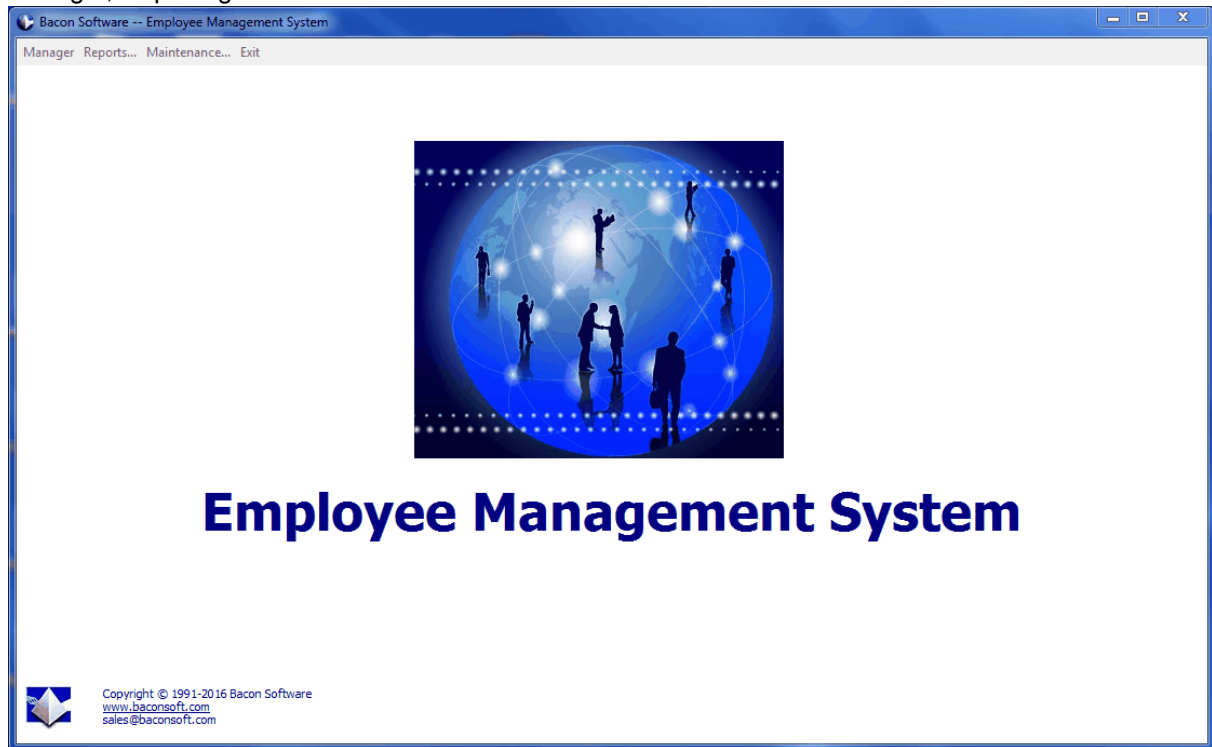
The system requires user id's and passwords for access via a standard login screen:



The screenshot shows a Windows-style dialog box titled "Bacon Software Employee Management System" with a close button (X) in the top right corner. Inside the dialog, there is a sub-header "Employee Management System -- Login". Below this, there are two input fields: "User ID:" followed by a text box with a dropdown arrow, and "Password:" followed by a text box. To the right of the "User ID" field is a "Login" button with a green checkmark icon. To the right of the "Password" field is a "Cancel" button with a red X icon.

1.3 Main Menu

The Main Menu screen provides access to functions in the system including the Employee Action Manager, Reporting and Maintenance functions.



1.4 Employee Action Manager

The Employee Action Manager provides up-front information and direct access to functions required including Performance Reviews, Training Records, Employee Updates, etc.

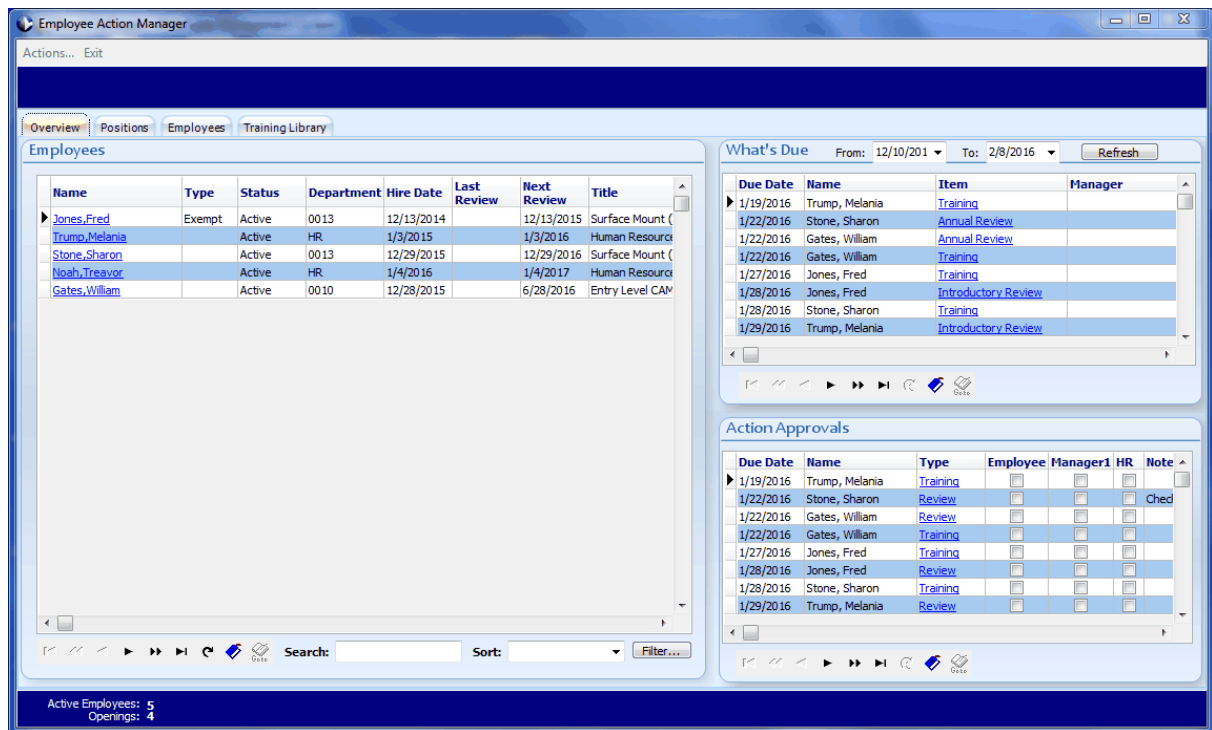
The Employee Action Manager "Actions..." menu is used to create items in the system including:

Add New Employee

Add New Job Description

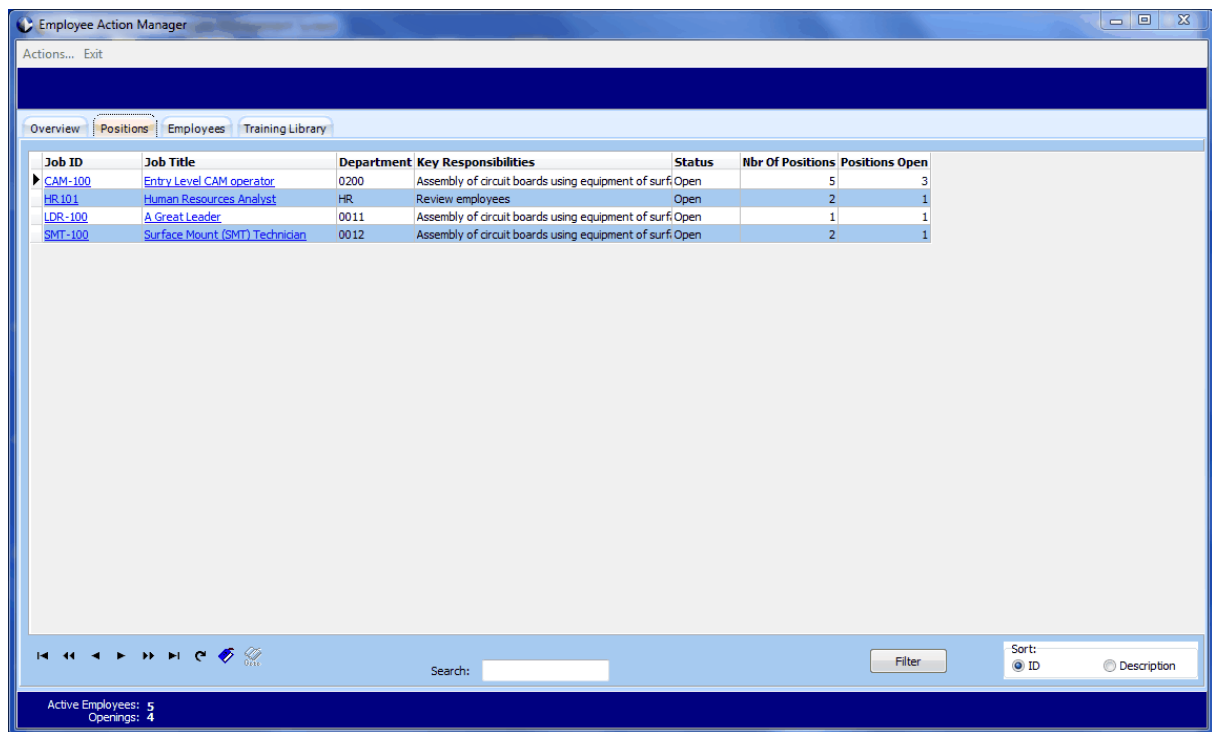
Create/Update Employee Performance Reviews

Create/Update Employee Training Events



The **Overview** Tab displays the following:

1. A list of employees with key information. You can click on the Employee Name to edit a employee.
2. A list of items that are due, such as Training and Performance Reviews. You can click on the item to edit it.
3. A list of actions that are in various stages of approval.

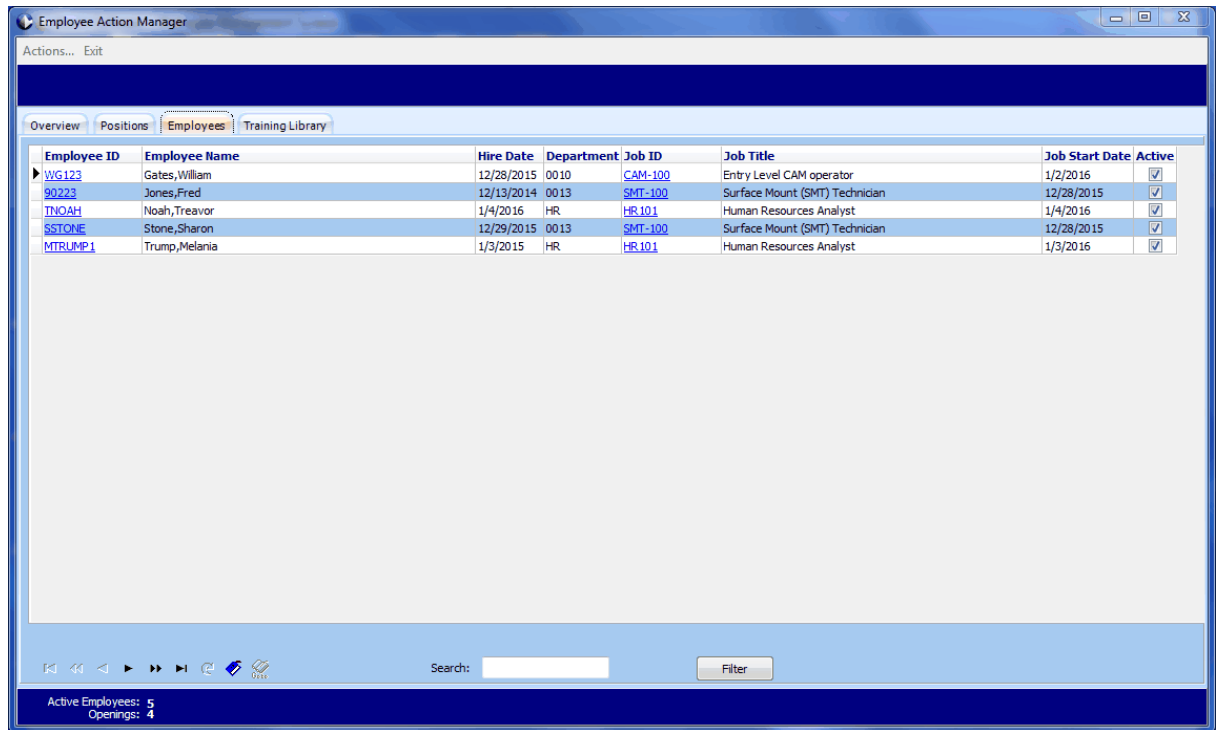


The screenshot shows the 'Employee Action Manager' application window. The 'Positions' tab is selected, displaying a table of job positions. The table has columns for Job ID, Job Title, Department, Key Responsibilities, Status, Nbr Of Positions, and Positions Open. The data is as follows:

Job ID	Job Title	Department	Key Responsibilities	Status	Nbr Of Positions	Positions Open
CAM-100	Entry Level CAM operator	0200	Assembly of circuit boards using equipment of surf.	Open	5	3
HR-101	Human Resources Analyst	HR	Review employees	Open	2	1
LDR-100	A Great Leader	0011	Assembly of circuit boards using equipment of surf.	Open	1	1
SMT-100	Surface Mount (SMT) Technician	0012	Assembly of circuit boards using equipment of surf.	Open	2	1

At the bottom of the window, there is a status bar showing 'Active Employees: 5' and 'Openings: 4'. There is also a search bar and a 'Filter' button.

The **Positions** Tab provides access to a list of all positions in the company indicating how many are open and filled. You can click on the position name to update the information for that position.

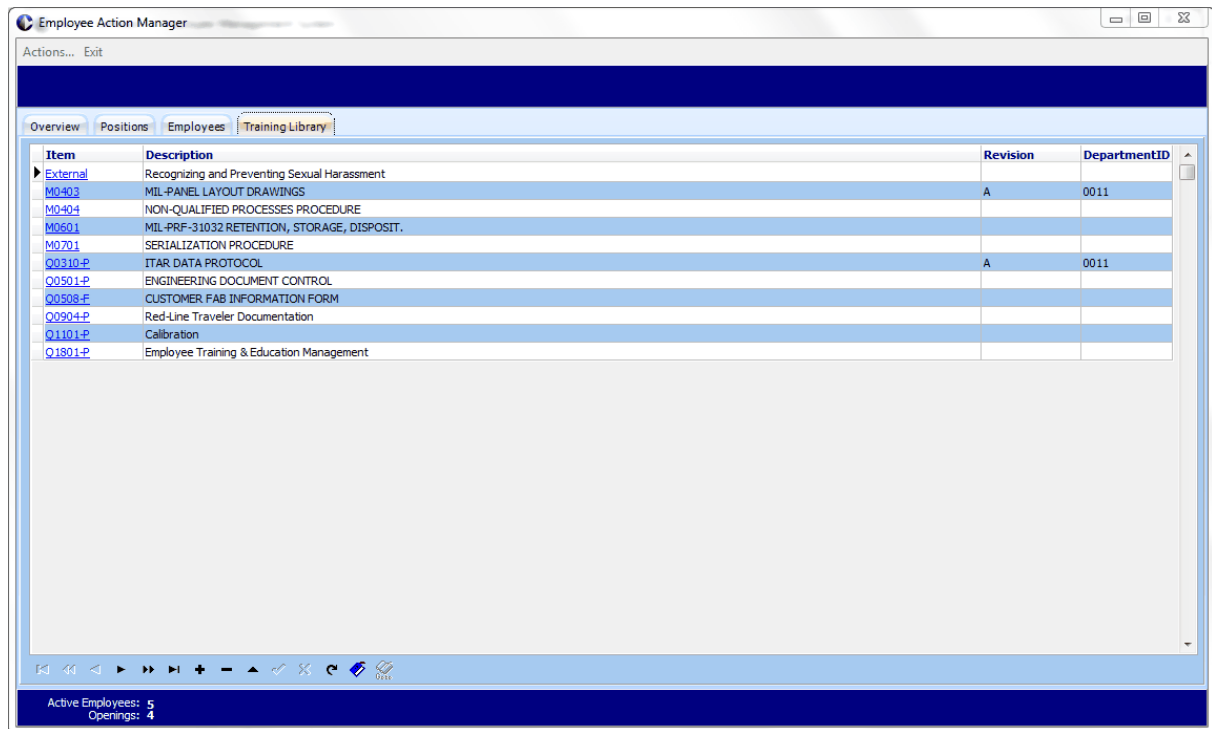


The screenshot shows the 'Employee Action Manager' application window. It has a menu bar with 'Actions...' and 'Exit'. Below the menu is a tabbed interface with 'Overview', 'Positions', 'Employees' (selected), and 'Training Library'. The 'Employees' tab displays a table with the following data:

Employee ID	Employee Name	Hire Date	Department	Job ID	Job Title	Job Start Date	Active
WG123	Gates, William	12/28/2015	0010	CAM-100	Entry Level CAM operator	1/2/2016	✓
90223	Jones, Fred	12/13/2014	0013	SMT-100	Surface Mount (SMT) Technician	12/28/2015	✓
TNOAH	Noah, Treavor	1/4/2016	HR	HR-101	Human Resources Analyst	1/4/2016	✓
SSTONE	Stone, Sharon	12/29/2015	0013	SMT-100	Surface Mount (SMT) Technician	12/28/2015	✓
MTRUMP1	Trump, Melania	1/3/2015	HR	HR-101	Human Resources Analyst	1/3/2016	✓

At the bottom of the window, there is a status bar showing 'Active Employees: 5' and 'Openings: 4'. Above this, there is a search bar with the text 'Search:' and a 'Filter' button.

The **Employees** tab lists all employees in the company and their current position. You can click on the Employee ID to update the employee information. You can click on the "Job ID" to update the job listing information.



The **Training Library** tab provides access to a list of all training items used. Each of these items can be linked to the training requirements for individual jobs.

1.5 Report Manager

The Report Manager provides access to powerful reporting abilities in the system.

The screenshot shows a 'Reports' dialog box with a light blue header and a white body. On the left, there are two sections: 'Report Type:' with radio buttons for '0 - Employee Training Cross Reference' and '1 - Events Due' (selected); and 'Events to Include:' with radio buttons for 'Training', 'Review', and 'Both' (selected). Below these are two date pickers: 'Date From:' and 'Date To:', both set to '1/9/2016'. On the right, there is a 'Status Types to Include:' section with radio buttons for 'Open', 'Closed', and 'Both' (selected). At the bottom left, there is a checkbox labeled 'Email Document'. At the top right, there are two buttons: 'Print' (with a printer icon) and 'Cancel' (with a red X icon).

1.6 Maintenance

The Maintenance selection provides access to Maintenance type features in the system including:

1. Setup/Maintenance of system Users.
2. Setup/Maintenance of settings in the system (Module Parameters).
3. Setup/Maintenance of Departments in the system.
4. Adjust Batch Routines used by the system.

1.7 Performance Review

Performance Review

The **Performance Review** screen provides access to create/update a performance review for employees:

The performance review information is completely table driven. You can add/update/delete items that show on the performance review screen. You can tailor individual performance review items by employee and by job type.

You can print/email performance review documents.

You can have electronic signatures for the reviews by clicking the large buttons at the bottom of the screen. A user id and password is required and the signature date/time will be recorded in the system.

Performance Review

Print... Delete Done

Review Info Attachments

Employee: 90223 Date of Last Review: Due Date: 1/28/2016 Reviewer: STONE Review ID: R21
 Job Title: Surface Mount (SMT) Techn Department: 0013 Review Date: 1/22/2016 Status: Open
 Hire Date: 12/13/2014 Supervisor: Type of Evaluation: Introductory Notes: Fred Jones

This Review Covers From: To: 1/7/2016

Key Performance Measures

Line Nbr	Item Description	Outstanding	Exceeds Standards	Meets Standards	Needs Improvement	Unsatisfactory	Comments
1	Customer Focus (Ensures customer satisfaction, both external & internal, responds promptly, and makes special effort to meet needs of customers)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Job Duties and Responsibilities

Line Nbr	Item Description	Outstanding	Exceeds Standards	Meets Standards	Needs Improvement	Unsatisfactory	Comments
2	Appearance (Projects positive image, well groomed & professional, and proper dress attire)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Department and Other Managers Only

Line Nbr	Item Description	Outstanding	Exceeds Standards	Meets Standards	Needs Improvement	Unsatisfactory	Comments
1	Performance Management (Establishes clear performance standards; provides guidance and support; completes performance reviews in a timely manner; demonstrates effective managerial skills in recruiting)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Performance Summary:
 Determine the employee's overall job effectiveness by considering the employee's performance against the key performance measures reviewed above as well as the strengths and potential improvements of the employee.

☐ Outstanding
☐ Exceeds Standards
☐ Meets Standards
☐ Needs Improvement
☐ Unsatisfactory

Current Compared to Last
☐ Improving
☐ Consistent
☐ Declining
☐ First Review

Development Plan (Click in Box to edit):
 Development Needs or Additional Training:
 Immediate Improvements Required: (Include completion dates)
 Upcoming Goals for the Next Review:
 Employees Comments:

Sign Off:
☒ Employee
☒ Manager

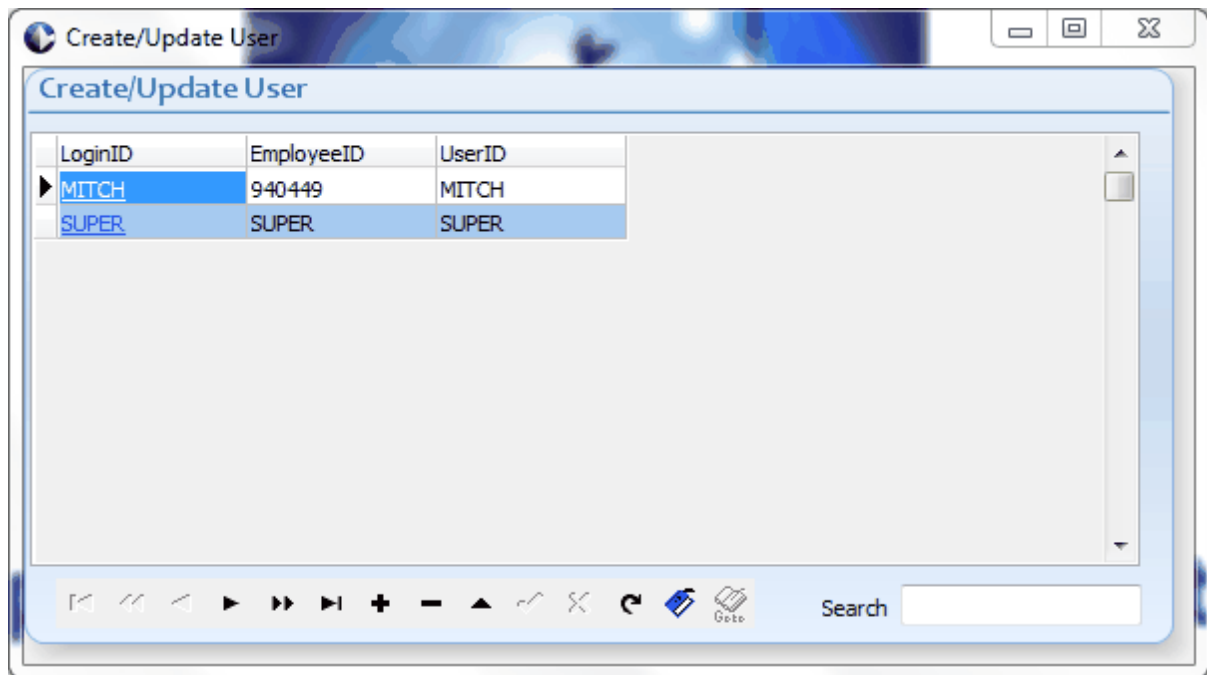
2 Using the Employee Manager System

2.1 Maintenance Functions

Enter topic text here.

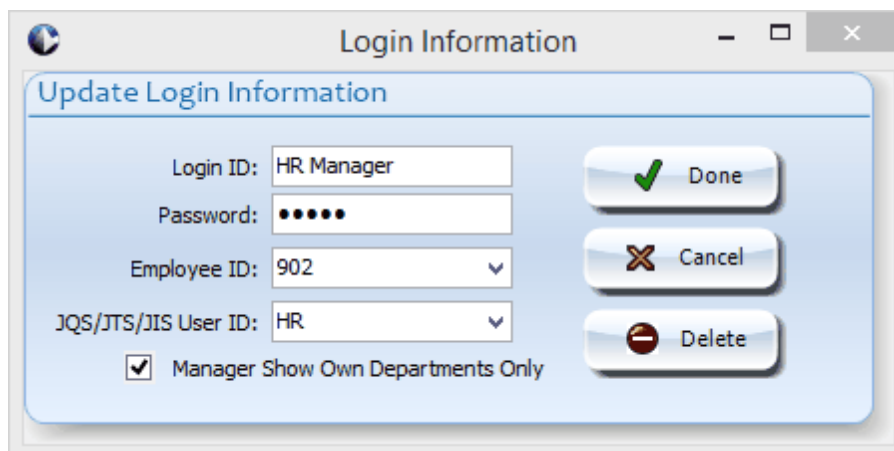
2.1.1 Setting Up System Users

System Users are individuals that have access to the Employee Management System. Each system user can be linked to a Employee Id and to a Login ID in the Bacon Software Job Trac System.



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You can add users by clicking the + button below the grid. If you click on the "LoginID" link the login update screen will display where you can select Employee and User information.



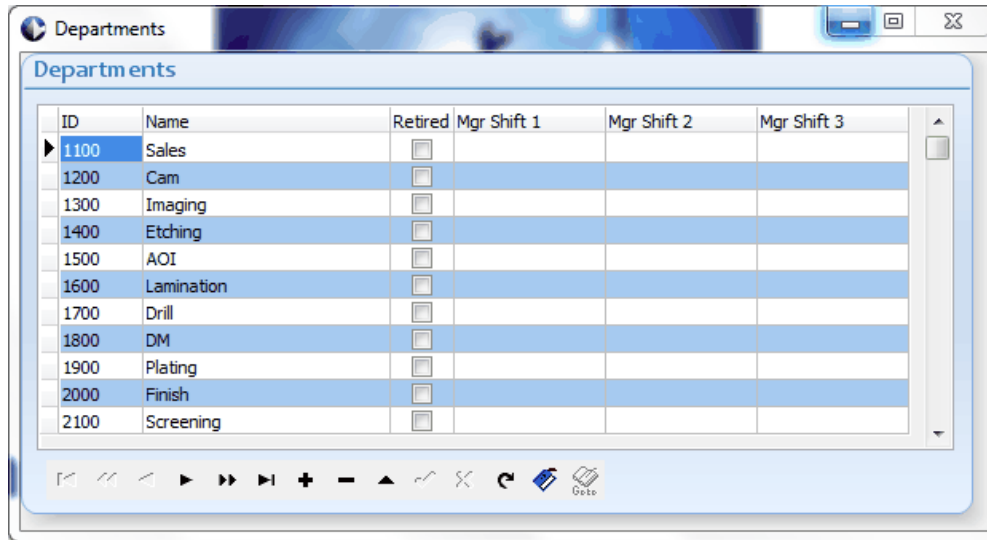
Click the the "Employee ID" drop down to link the user to a employee in the system.

Click in the JQS/JTS/JIS User ID drop down to link to other Bacon Software products.

If the "Manager Show Own Departments Only" is selected then the user is a department manager and only information to that users department will be displayed on the Employee Management System screens.

2.1.2 Setting Up Departments

The Department function allows you create Departments and assign Managers for all 3 shifts. .



2.1.3 Module Parameters

Module Parameters are used to set various attributes used by the system. You can expand each note and click on the parameter to learn more.

The screenshot shows the 'frmEMSMModuleParameters' application window. It features a search bar, search type options (Description, Field Name), and a checkbox for 'Edit Parm Help File--enable this to edit help'. The main area displays a tree view of parameters under the 'Employee Management System' category. The 'Employee Performance' section is expanded, showing 'EP Print Parameters' with 'EP Logo Height' set to 0.5, 'EP Logo X Position' set to 0.5, and 'EP Logo Y Position' set to 0.3. The 'Job Descriptions' section is also expanded, showing 'JD Print Parameters' with 'JD Logo Height' set to 0.5, 'JD Logo X Position' set to 0.5, and 'JD Logo Y Position' set to 0.3. The 'Settings' section is expanded, showing 'Display' with 'Grid Alternate Row Color' set to 'clSkyBlue' and 'Grid Line Color' set to 'clSilver'.

Category	Parameter	Value
Attachments		
Employees		
Jobs		
Reviews		
Training		
Employee Performance		
EP Print Parameters	EP Logo Height	0.5
EP Print Parameters	EP Logo X Position	0.5
EP Print Parameters	EP Logo Y Position	0.3
Job Descriptions		
JD Print Parameters	JD Logo Height	0.5
JD Print Parameters	JD Logo X Position	0.5
JD Print Parameters	JD Logo Y Position	0.3
Settings		
Display	Grid Alternate Row Color	clSkyBlue
Display	Grid Line Color	clSilver

Employee Performance : EP Print Parameters : EP Logo Height

This defines the height in tenths of inches for the company logo that will print on the Employee Performance document.

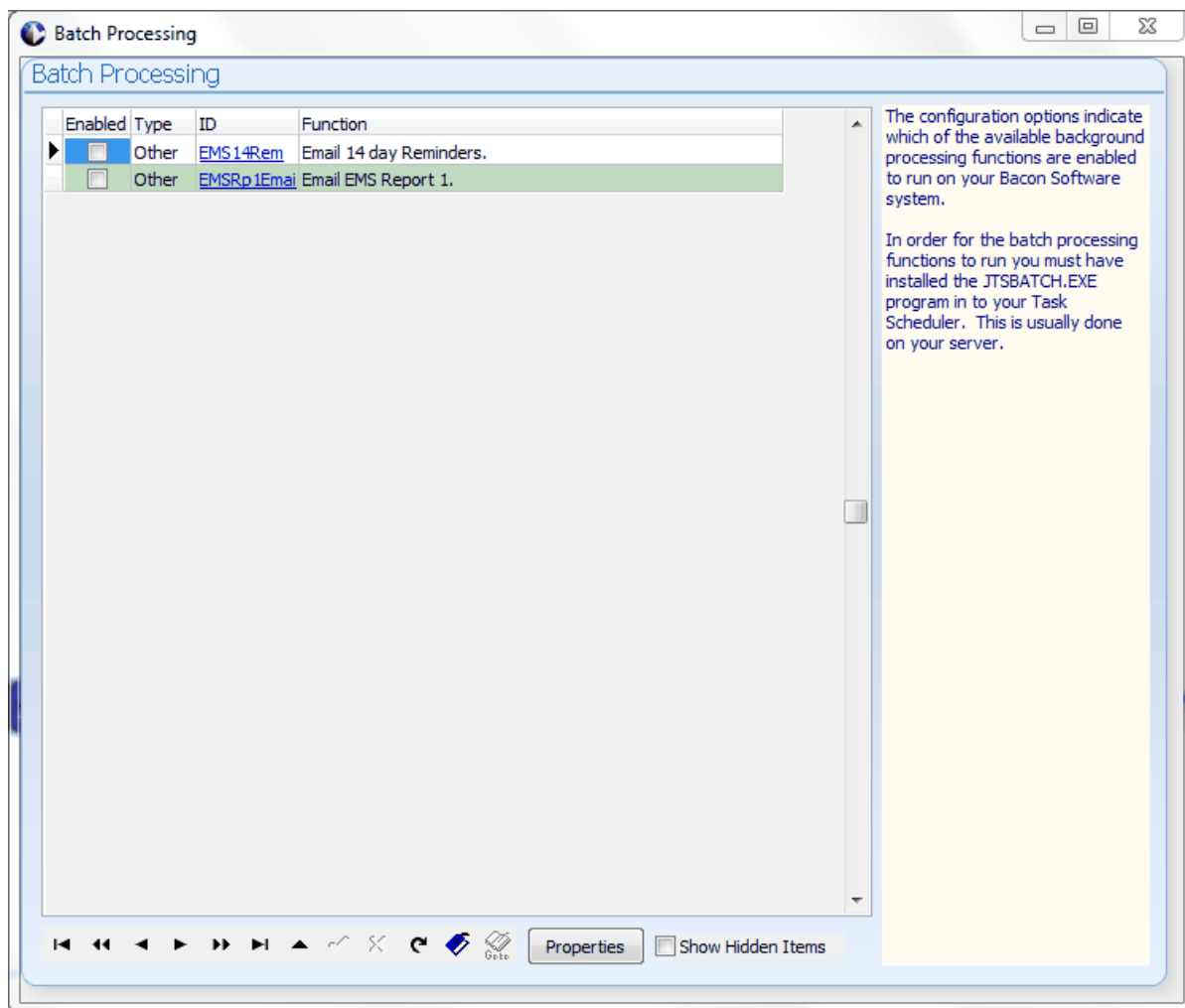
Note:
Your company logo should be placed in the EMS folder and be named logo.bmp.
Typically the EMS folder is located in N:\adjobsys\EMS*** on your server.
The system finds the location of your EMS folder by looking at the ads.ini file located in the N:\adjobsys*** and c:\windows folders on your machine.

*** N: may be a different drive on your system.

2.1.4 Batch Routines

Various Batch Routines are used in the system to send emails and perform other batch related functions.

The first screen displays the available routines. You can click on the link for each routine to update the parameters relative to that routine.



Once you click on the link the Parameter Detail screen displays:

Each detail screen will provide a description of what the routine allow you to enter information required to run the batch routine.

Import Properties: Email List

Properties **Email List**

☒ Enabled ☐ Hide from Display

Type: Other

ID: EMSRp1Email

Function: Email EMS Report 1.

Email Address:

Email Distribution:

Destination Dir/File: ...

Select Data from: week day(s) prior to current date

Select Data to: week day(s) after to current date

Run Frequency:

Run times per day.

☐ Repeat processing every

Current Run Information:

Last Run Date:

Current Run Count:

Notes:

This function will email the EMS Report 1 to the email address entered on this screen.

It is the same as Report 1 found in the EMS module

Running Batch Routines.

Run the JTSBATCH.EXE program located in the \adjobsys folder of your system.

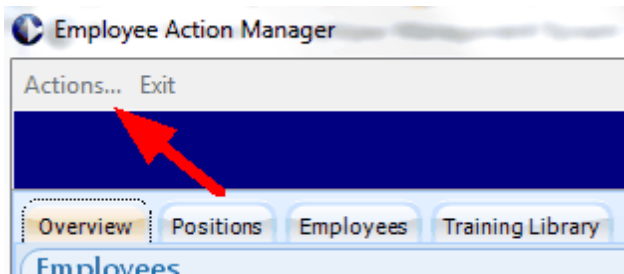
You can use the Microsoft Scheduler to schedule JTSBATCH to run at daily intervals. The JTSBATCH program will then review your settings for the batch functions and run them based on the "Run Frequency" parameters you have configured for them.

2.2 Employees

The Employee Management System maintains a complete list of all your employees, employee Performance Appraisals and employee Training.

2.2.1 Create/Update Employees

Employees are added to the system from the Employee Action Manager screen by selecting **Actions...Add New Employee**.



The Employee Update screen displays where you can enter employee information. The tabs at the top of the screen allow you to view information about the employee:

- "Employee Information" - Personnel information and Job Positions
- "Review Information" - a history of all performance reviews
- "Training Information" - a history of all training events for the employee
- "Attachments" - any type of document may be attached to the employee.

The "Employee Information" tab contains personal information about the employee.

Field	Information
ID	A unique ID for each employee, such as the Employee Number from your payroll system.
Badge	A Badge number for the employee. This can be the same as the employee number but should be a number that is not public information. The employee will be asked to supply this number when doing electronic "Sign-Off" on Employee Reviews and Employee Training.
First, Middle, Last	The Employee's name.
Department	The Department that the employee works in.
Shift	The Primary Shift that the employee works on.

Manager of this Department	If the employee is the manager of the department selected then click this box.
Manager of this Shift	If the employee is the manager of the shift selected then click this box.
Hire Date	The date the employee was hired to work at the company.
Review Frequency	How often the employee receives a Performance Appraisal Review.
HR Rep	The employees Human Resources Representative.
Status	The current status for the employee.

You can add a picture of the employee by clicking the "Load Image" button.

The screenshot displays the 'Employee' application window. At the top, there are window controls and a menu bar with 'Delete', 'Print', and 'Done'. Below the menu bar are four tabs: 'Employee Information' (selected), 'Review Information', 'Training Information', and 'Attachments'. The main content area is divided into two sections: 'Employee Update' and 'Employee Positions'.

Employee Update Section:

Department Manager: _____
Shift Manager: _____

ID: Badge:

First: Middle: Last:

Department: ☐ Manager of this Department

Shift: ☐ Manager of this Shift

Hire Date: Review Frequency:

HR Rep: Status:

Notes:

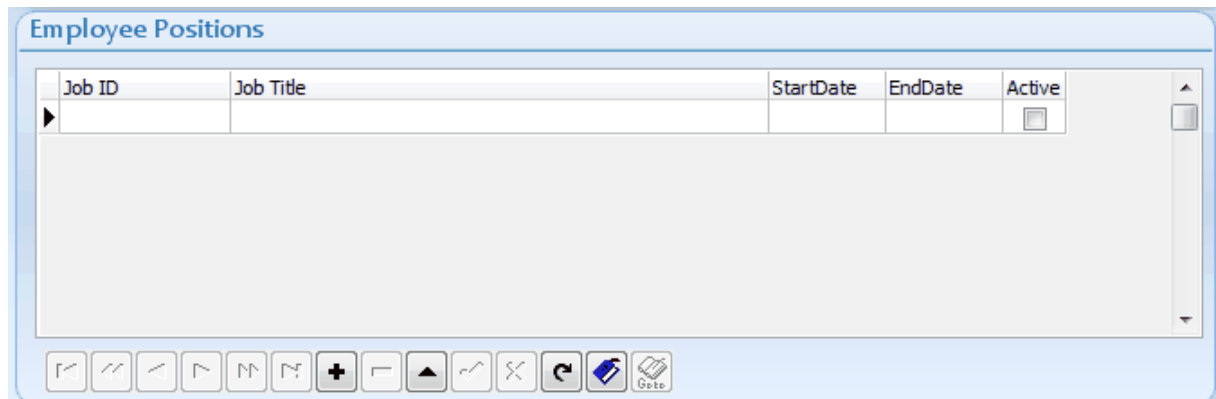
On the right side of the 'Employee Update' section, there is a large empty box for a profile picture, with 'Load Image' and 'Clear Image' buttons below it.

Employee Positions Section:

Job ID	Job Title	StartDate	EndDate	Active
				<input type="checkbox"/>

Below the table is a large empty area for additional positions. At the bottom of the window is a toolbar with various icons for editing and navigation.

2.2.2 Assigning Job Positions to Employees



The screenshot shows a window titled "Employee Positions". Inside the window is a table with the following columns: Job ID, Job Title, StartDate, EndDate, and Active. The table is currently empty. Below the table is a toolbar with several icons: a left arrow, a right arrow, a double left arrow, a double right arrow, a plus sign, a minus sign, a refresh icon, a delete icon, a save icon, and a print icon.

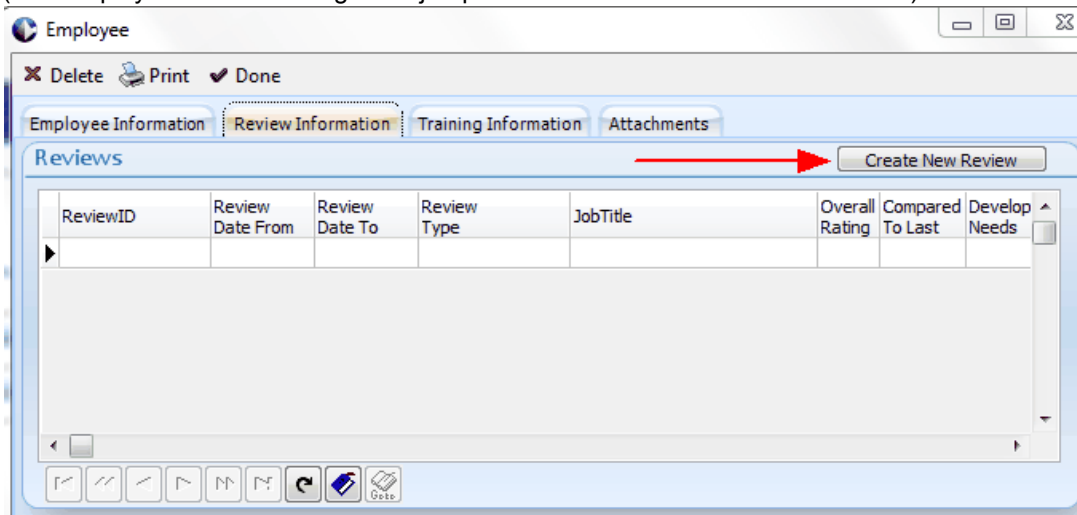
You can assign a job position to the employee by clicking in the "Employee Positions" grid in the bottom portion of the screen. Add a position by clicking the "+" "VCR" type button below the grid or by using the down arrow to cursor to a blank line. Click in the "Job ID" column to select a position for the employee.

You may fill in the Start Date and End Date values for the position and check the "Active" check box. Over time if the employee gets new positions they may be added in this grid or the employee may have multiple positions at the same time.

2.2.3 Create/Update Employee Performance Appraisals

Employee Performance Appraisals can be created and reviewed from the "Review Information" tab. A complete history of all Employee Performance Appraisals will build on this screen over time.

To create a new Appraisal click the "Create new Review" button on the screen.
(The Employee must be assigned a job position before a review can be created).



The screenshot shows the 'Employee Manager System' interface. At the top, there's a title bar 'Employee' with standard window controls. Below it, a toolbar contains 'Delete', 'Print', and 'Done' buttons. The main area has four tabs: 'Employee Information', 'Review Information' (which is selected and highlighted in orange), 'Training Information', and 'Attachments'. Under the 'Review Information' tab, there's a section titled 'Reviews'. To the right of this section is a button labeled 'Create New Review', with a red arrow pointing to it. Below the button is a table with the following columns: ReviewID, Review Date From, Review Date To, Review Type, JobTitle, Overall Rating, Compared To Last, and Develop Needs. The table is currently empty. At the bottom of the window, there's a toolbar with various icons for navigation and editing.

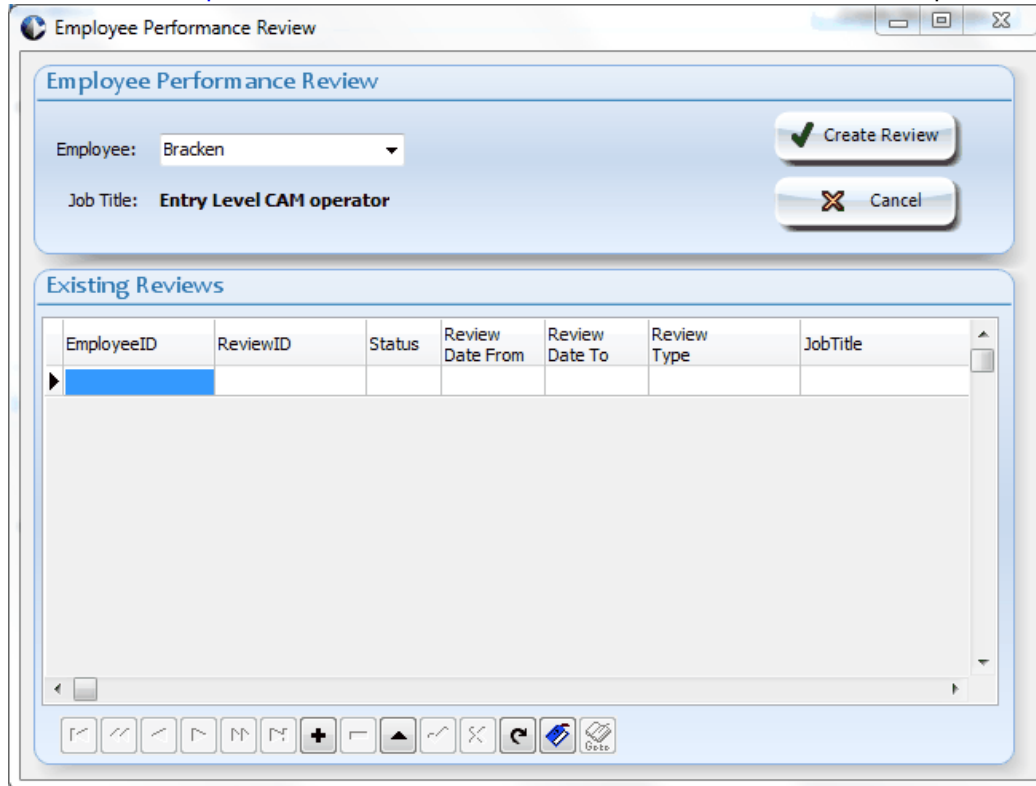
ReviewID	Review Date From	Review Date To	Review Type	JobTitle	Overall Rating	Compared To Last	Develop Needs
----------	------------------	----------------	-------------	----------	----------------	------------------	---------------

The Following screen will display.

Click the "Create Review" button to create a employee review for the indicated "Job Title".

Review information is loaded from the defaults defined for the employees Job Position.

Refer to [Create/Update Job Positions](#) for information on how to create review templates for job positions.



The screenshot shows a software window titled "Employee Performance Review". It contains two main sections. The top section, titled "Employee Performance Review", has a form with "Employee:" set to "Bracken" and "Job Title:" set to "Entry Level CAM operator". To the right of the form are two buttons: "Create Review" (with a green checkmark icon) and "Cancel" (with a red X icon). The bottom section, titled "Existing Reviews", contains a table with the following columns: EmployeeID, ReviewID, Status, Review Date From, Review Date To, Review Type, and JobTitle. The table is currently empty, with only the first row highlighted in blue. Below the table is a toolbar with various icons for navigation and actions.

EmployeeID	ReviewID	Status	Review Date From	Review Date To	Review Type	JobTitle

The employee review screen will display and the review information can be setup. When the actual review is conducted you can access this screen again either from the Employee Update screen or from the Employee Manager. Refer to [Conducting Employee Reviews](#) for more information.

Performance Review

Print... Delete Done

Review Info Attachments

Employee: **9022294** Date of Last Review: Department: **1100** Due Date: Reviewer: Review ID: **R1**
 Job Title: **Entry Level CAM operator** Supervisor: Review Date: Status: **Open**
 Hire Date: **1/13/2016** Type of Evaluation: **Introductory** Notes: **Tom Bracken**
 This Review Covers From: **1/13/2016** To: **1/13/2017**

Key Performance Measures

Line Nbr	Item Description	Outstanding	Exceeds Standards	Meets Standards	Needs Improvement	Unsatisfactory	Comments
1	Customer Focus (Ensures customer satisfaction, both external & internal, responds promptly, and makes special effort to meet needs of customers)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Job Duties and Responsibilities

Line Nbr	Item Description	Outstanding	Exceeds Standards	Meets Standards	Needs Improvement	Unsatisfactory	Comments
2	Appearance (Projects positive image, well groomed & professional, and proper dress attire)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Department and Other Managers Only

Line Nbr	Item Description	Outstanding	Exceeds Standards	Meets Standards	Needs Improvement	Unsatisfactory	Comments
1	Performance Management (Establishes clear performance standards; provides guidance and support; completes performance reviews in a timely manner; demonstrates effective managerial skills in recruiting)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Performance Summary:
 Determine the employee's overall job effectiveness by considering the employee's performance against the key performance measures reviewed above as well as the strengths and potential improvements of the employee.

☐ Outstanding
☐ Exceeds Standards
☐ Meets Standards
☐ Needs Improvement
☐ Unsatisfactory

Current Compared to Last
☐ Improving
☐ Consistent
☐ Declining
☐ First Review

Development Plan (Click in Box to edit):

Development Needs or Additional Training:

Immediate Improvements Required: (Include completion dates)

Upcoming Goals for the Next Review:

Employees Comments:

Sign Off:

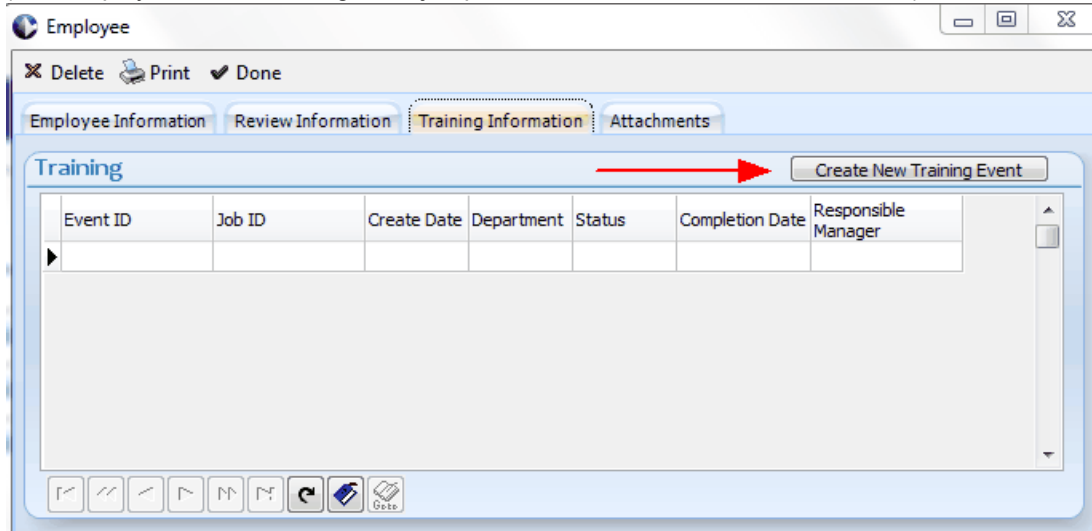
☒ **Employee**

☒ **Manager**

2.2.4 Create/Update Employee Training Events

Employee Training Events can be created and reviewed from the "Training Information" tab. A complete history of all Employee Training Events will build on this screen over time.

To create a new Training Event click the "Create new Training Event" button on the screen. (The Employee must be assigned a job position before a review can be created).

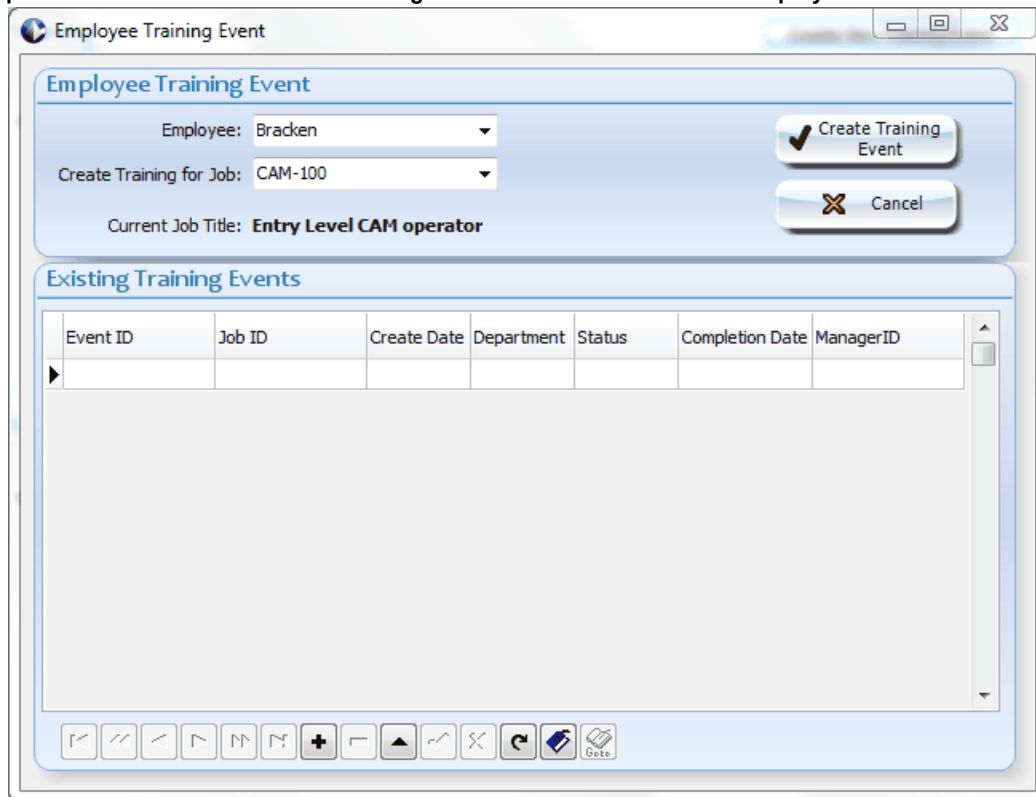


The screenshot displays the 'Employee' window with the 'Training Information' tab selected. The window has a title bar with standard OS controls. Below the title bar is a menu bar with 'Delete', 'Print', and 'Done'. The main area contains four tabs: 'Employee Information', 'Review Information', 'Training Information' (active), and 'Attachments'. The 'Training Information' tab shows a 'Training' section with a table. A red arrow points to the 'Create New Training Event' button located above the table. The table has columns for Event ID, Job ID, Create Date, Department, Status, Completion Date, and Responsible Manager. The bottom of the window features a toolbar with various icons for navigation and actions.

Event ID	Job ID	Create Date	Department	Status	Completion Date	Responsible Manager

The following screen will display:

Click the "Create Training Event" to create the event. The default training information for the selected job position will be loaded for the training event that is created for the employee.



The screenshot shows a software window titled "Employee Training Event". It contains two main sections. The top section, "Employee Training Event", has two dropdown menus: "Employee:" with "Bracken" selected, and "Create Training for Job:" with "CAM-100" selected. Below these is the text "Current Job Title: Entry Level CAM operator". To the right are two buttons: "Create Training Event" (with a checkmark icon) and "Cancel" (with an 'X' icon). The bottom section, "Existing Training Events", contains a table with the following columns: Event ID, Job ID, Create Date, Department, Status, Completion Date, and ManagerID. The table is currently empty. At the bottom of the window is a toolbar with various icons for navigation and editing.

Event ID	Job ID	Create Date	Department	Status	Completion Date	ManagerID
----------	--------	-------------	------------	--------	-----------------	-----------

The Training Event screen will display and the training event information can be setup. When the actual training is conducted you can access this screen again either from the Employee Update screen or from the Employee Manager. Refer to [Conducting Employee Training](#) for more information.

Employee Training Event

Print... Delete Done

Training Plan Attachments

Employee: 9022294 Date of Last Training: Create Date: 1/13/2016 Manager To Train: Event ID: T1
Job Title: Entry Level CAM operator Department: 1100 Supervisor: Due Date: Type:
Hire Date: 1/13/2016 Status: Open Completed: Source: Tom Bracken

Item Code	Description	Sign Off Date	Sign Off ID
M0403	MIL-PANEL LAYOUT DRAWINGS		
M0404	NON-QUALIFIED PROCESSES PROCEDURE		
Q0310-P	ITAR DATA PROTOCOL		
Q0508-F	CUSTOMER FAB INFORMATION FORM		

Sign Off:

Employee Manager

Open

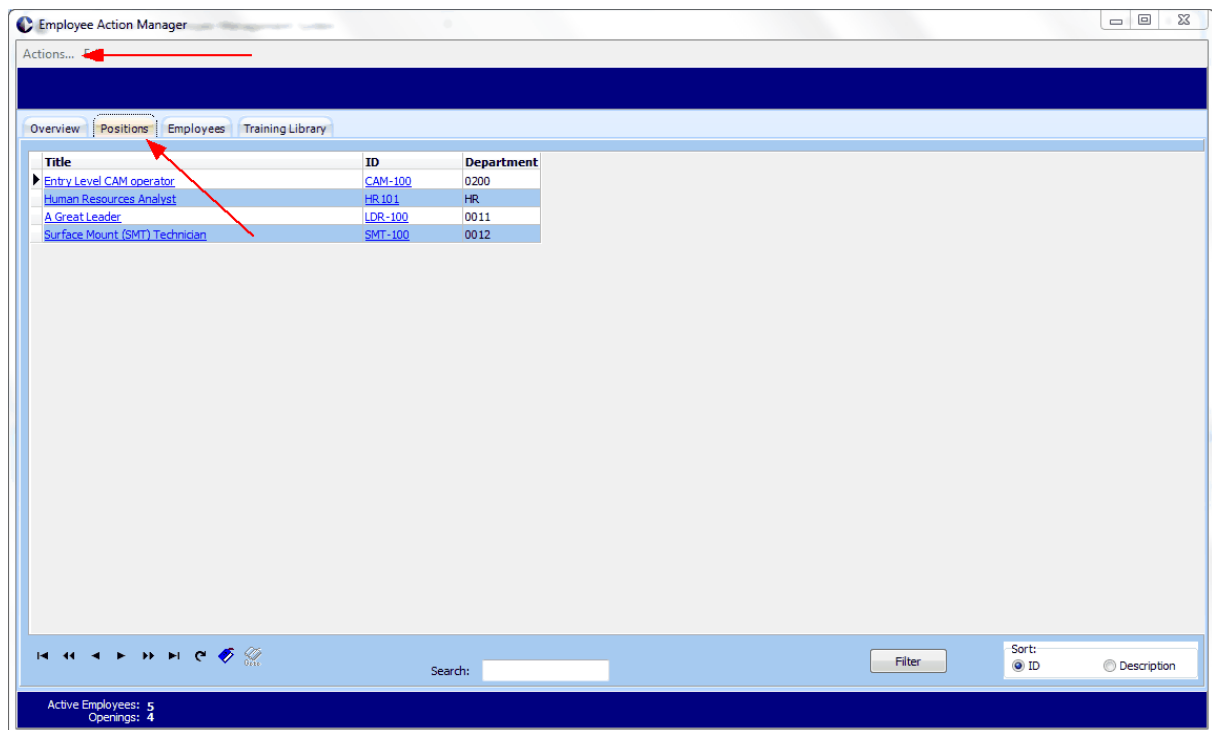
2.3 Job Positions

The Employee Management System allows you to maintain a complete list of all job positions in your company. Training requirements and performance appraisal information can be linked to each job position to create templates. This allows you to easily assign job positions to employees and create employee training and reviews based on these templates.

You can review the positions in the company by clicking on the "Positions" tab of the main Employee Manager Screen:

You can click on the **"Actions..."** menu and select **"Add Job Description"** to add a new Job Description in the system.

The "Positions" tab also provides for "Sort", "Filter" and "Search" functions at the bottom of the screen.



2.3.1 Create/Update Job Positions

When you click the "Add Job Description" selection, the following screen will display:

The screenshot shows a web-based form titled "Job Description". At the top, there are tabs for "Job Description", "Review Criteria", "Training Criteria", and "Attachments". Below the tabs, the form is divided into several sections:

- Job Description ID:** A text input field.
- Job Title:** A text input field.
- Total Positions:** A numeric input field with a dropdown arrow.
- Open Positions:** A numeric input field with a dropdown arrow.
- Department:** A dropdown menu.
- Status:** A dropdown menu.
- Date Published:** A date input field.
- Key Responsibilities:** A large text area.
- General Nature of Work Performed:** A large text area.
- Knowledge Requirements:** A text area with the subtitle "(Organized body of information person in this job mentally possesses through education, training, or personal experience)".
- Skill Requirements:** A text area with the subtitle "(All job skills and any specialized competencies)".
- Experience:** A section with the subtitle "(Minimal experience required to perform job satisfactorily.)". It includes a "Years:" dropdown and a "Type:" dropdown.
- Abilities:** A text area with the subtitle "(Physical, mental, aptitudes)".
- Other:** A text area.

You may then enter information specific to the job position.

Item	Description
Job Description ID	Each job description must have a unique ID.
Job Title	Enter a title for the job.
Total Positions	Enter the total number of positions you have for this job position in the company.
Open Positions	Enter how many of this job position are currently open.
Department	Select the department that this job position works under.
Status	Select a status for this position. Open - you are looking for a candidate Filled - this position is filled. Offer- you have put a offer out on this position.
Date Published	The most recent date that his position was published.

Key Responsibilities	Enter the key responsibilities for a employee how fills this position.
General Nature of Work Performed	Describe what type of work.
Knowledge Requirements	Describe any training and knowledge the employee needs to posses prior to having this position.
Skill Requirements	All job skilss and any specialized competencies
Experience	Enter the number of years and type of experience the employee needs for the position. Details can be entered in the box below.
Abilities	Physical, Mental and Apptitude
Other	Anything else required for the position.

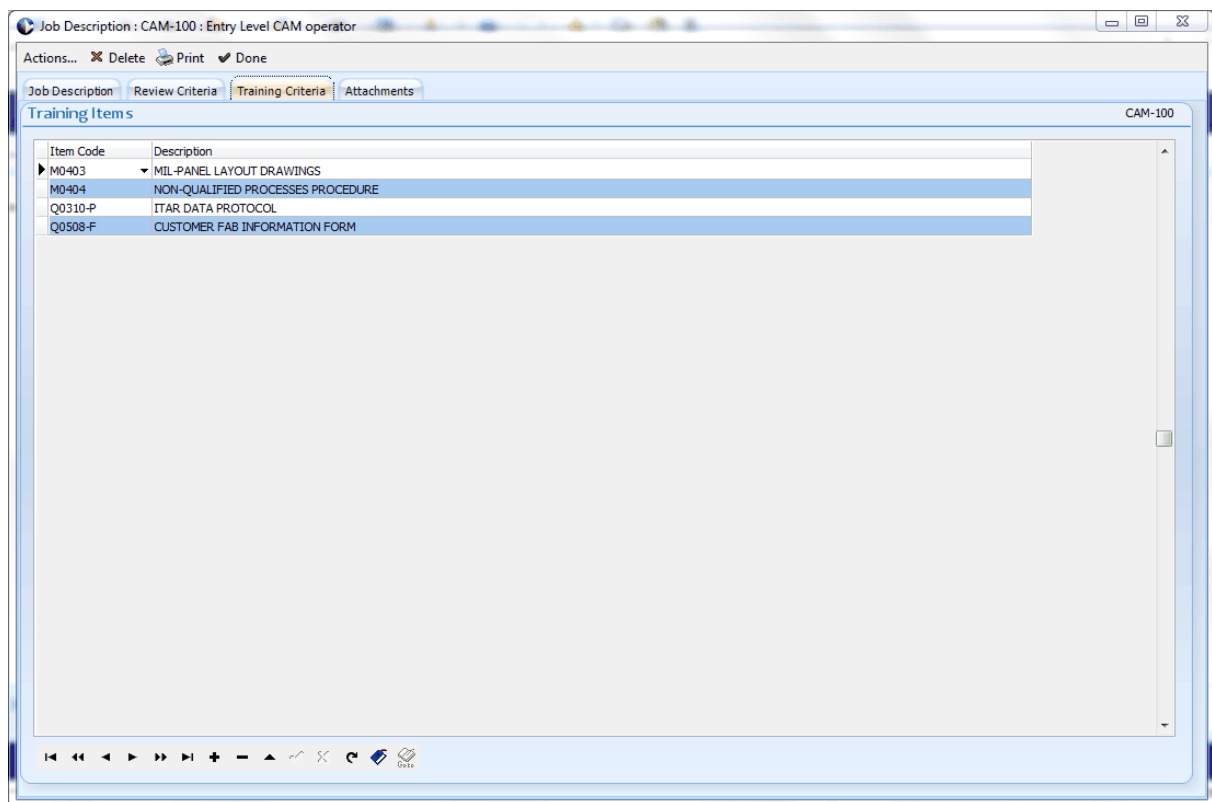
2.3.2 Define Training Requirements for Job Positions

On the "Training Criteria" tab you select the training items required for the job position.

To add a new line use your cursor key to arrow down to a blank line, or click the + VCR type button at the bottom of the screen.

Next click in the "Item Code" column to display a drop down of the training items loaded in the system. Click on the one that you want to add.

In this manner you build the "Default" training requirements for the job position. When you elect to create a training event for a employee the system copies the list from this screen and links it to the training event created for the employee. You can then adjust the actual training event requirements for the employee by adding and deleting training lines as required.



2.3.3 Define Performance Appraisal Requirements for Positions

You can define the default Performance Appraisal Requirements for the job position using this screen.

Entries on this screen define the default requirements for performance appraisals for this job position.

Job Description : CAM-100 : Entry Level CAM operator

Actions... Delete Print Done

Job Description Review Criteria Training Criteria Attachments

Review Criteria

Customer and Work Relations

Line Nbr	Item Description
1	Customer Focus (Ensures customer satisfaction, both external & internal, responds promptly, and makes special effort to meet needs of customers)
2	Appearance (Projects positive image, well groomed & professional, and proper dress attire)

Job Duties and Responsibilities

Line Nbr	Item Description
1	Quality of Work (attention to details, accurate, catches & corrects mistakes, commitment to quality standards, and learns & makes improvements)
2	Quality of Work (is productive & efficient, results oriented, takes on additional work as needed, and handles different tasks & time effectively)

Department and Other Managers Only

Line Nbr	Item Description
1	Performance Management (Establishes clear performance standards; provides guidance and support; completes performance reviews in a timely manner; demonstrates effective managerial skills in recruiting)
2	Staff Development (provides feedback and coaching, recognizes rewards employees, and encourages individual growth)

2.3.4 Attaching Documents to Job Positions

The "Attachments" tab allows you to attach documents to the Job Position.

3 Employee Performance Reviews

3.1 Conducting Employee Reviews

Prior to conducting the review, the review should be created for the employee.
Refer to [Create/Update Employee Performance Appraisals](#) for details.

To conduct the review select the review to update.

This can be done by the following methods:

1. Updating the employee and clicking on the "Reviews" tab and click the review id
2. On the Employee Manager screen the review may be displayed in "What's Due" and/or "Action Approvals" list.

The "Performance Review" screen displays the Review Items defined for the employee/Job Position. You will conduct the review with the employee and check off the appropriate selection for each item on the screen. Indicate a "Performance Summary" selection and "Current Compared to Last" selection. Fill out selections in the Development Plan area.

The screenshot shows the "Performance Review" window for employee SSTONE. The review is for the job title "Surface Mount (SMT) Techn" and is an annual evaluation. The review date is 1/22/2016, and the status is "Open". The reviewer is Sharon Soven. The review ID is R18.

The review includes three sections of performance measures:

Line Nbr	Item Description	Outstanding	Exceeds Standards	Meets Standards	Needs Improvement	Unsatisfactory	Comments
1	Customer Focus (Ensures customer satisfaction, both external & internal, responds promptly, and makes special effort to meet needs of customers)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1	Customer Focus (Ensures customer satisfaction, both external & internal, responds promptly, and makes special effort to meet needs of customers)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1	Performance Management (Establishes clear performance standards; provides guidance and support; completes performance reviews in a timely manner; demonstrates effective managerial skills in recruiting)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	


The bottom section contains the "Performance Summary" and "Development Plan" areas. The "Performance Summary" includes radio buttons for "Outstanding", "Exceeds Standards", "Meets Standards", "Needs Improvement", and "Unsatisfactory". The "Current Compared to Last" section includes radio buttons for "Improving", "Consistent", "Declining", and "First Review". The "Development Plan" section includes fields for "Development Needs or Additional Training", "Immediate Improvements Required", and "Upcoming Goals for the Next Review". The "Sign Off" section includes buttons for "Employee" and "Manager".


When the Review is complete both the Employee and the Manager need to do a electronic "Sign-Off". To do this you click the "Employee" and "Manager" buttons at the bottom of the screen. The electronic "Sign Off" screen will display. The Badge Number is entered to complete the "Sign Off".

Confirm Employee Performance Review

Employee Name: **Sharon Soven**
Job Title: **Surface Mount (SMT) Techn**
Review Date:

Enter Employee Badge Number:

 **Acknowledge
Performance Review**

 **Cancel**

4 Training Events

4.1 Conducting Employee Training

Prior to conducting the employee training, the training event should be created for the employee. Refer to [Create/Update Employee Training Events](#) for details.

To conduct the training, select the training event to update.

This can be done by the following methods:

1. Updating the employee and clicking on the "Training" tab and click the training event id
2. On the Employee Manager screen the Training Event may be displayed in "What's Due" and/or "Action Approvals" list.

The "Training Plan" screen displays the Training Items defined for the employee/Job Position. You will conduct the training with the employee and check off the appropriate selection for each item on the screen. Indicate a "Performance Summary" selection and "Current Compared to Last" selection. Complete the Sign Off Date and Sign Off ID for each item.

The screenshot shows the "Employee Training Event" window. At the top, there are tabs for "Training Plan" and "Attachments". Below the tabs, the employee information is displayed: Employee: SSTONE, Job Title: Surface Mount (SMT) Technician, Hire Date: 12/29/2015, Date of Last Trainings: 1/18/2016, Create Date: 1/6/2016, Manager To Train: (empty), Event ID: T31, Department: 0013, Supervisor: (empty), Due Date: 1/28/2016, Type: Re-Training, Status: Open, Completed: 1/18/2016, Source: Self. The name Sharon Soven is displayed in large blue text. Below this, there is a table with training items:

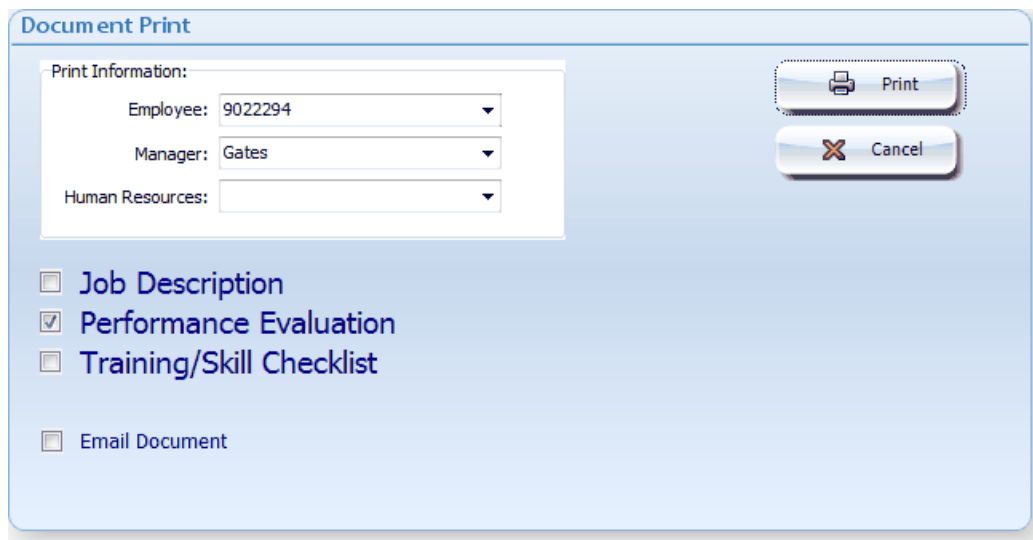
Item Code	Description	Sign Off Date	Sign Off ID
M0403	MIL-PANEL LAYOUT DRAWINGS	1/12/2016	MTRUMP1
M0404	NON-QUALIFIED PROCESSES PROCEDURE		
M0601	MIL-PRF-31032 RETENTION, STORAGE, DISPOSIT.		
M0701	SERIALIZATION PROCEDURE		

At the bottom of the window, there are two buttons: "Employee" and "Manager", both with a green checkmark icon. To the right of these buttons is a large red "Open" button. There is also a "Sign Off:" label above the buttons.

5 Print Documents

Key documents in the system can be printed. These include:

Job Descriptions
Performance Evaluations
Training/Skill Checklist



Document Print

Print Information:

Employee: 9022294

Manager: Gates

Human Resources:

☐ Job Description

☒ Performance Evaluation

☐ Training/Skill Checklist

☐ Email Document

Print

Cancel

These documents can be printed from the Employee Update Screen, Job Positions Screen, Review Screen and Training Screen.

6 Reports

From the main menu select "Reports". The Report Manager will display.

Reports

Report Type:

☐ 0 - Employee Training Cross Reference

☒ 1 - Events Due

Date From: 1/9/2016

Date To: 1/9/2016

Events to Include:

☐ Training

☐ Review

☒ Both

Status Types to Include:

☐ Open

☐ Closed

☒ Both

Print

Cancel

Email Document

Depending on which report type you select various options are available.

The "Employee Training Cross Reference" report will display the Job Positions for each employee.

Report Preview

File Page Zoom

Page 1 of 1

Zoom 100.0 %

1/13/2016 **Employee Completed Training Cross Reference (Reports 0)** Page 1 of 1

Employee	Pos1	Pos2	Pos3	Pos4	Pos5	Pos6
Bracken, Tom	HR101	LDR-100				
Gates, William	SMT-100					
Jones, Fred						
Noah, Treavor						
Soven, Sharon	SMT-100					
Trump, Melania	HR101					

Position ID	Description
HR101	Human Resources Analyst
LDR-100	A Great Leader
SMT-100	Surface Mount (SMT) Technician

The "Events Due" report can display Review Events, Training Events or both.

Report Preview

File Page Zoom

Page 1 of 1 Zoom 100.0 %

1/13/2016 **Training and Reviews Due (Reports 1)** Page 1 of 1

Due Date	Employee	Item	ID	Status	Manager	Description
1/14/2016	Gates, William	Training	T29	Complete		Initial Training
1/19/2016	Trump, Melania	Training	T28	Open		Initial Training
1/22/2016	Trump, Melania	Training	T25	Complete		Re-Training
1/22/2016	Soven, Sharon	Annual Review	R18	Open		Annual
1/22/2016	Gates, William	Annual Review	R17	Open		Annual
1/22/2016	Gates, William	Training	T30	Open		Initial Training
1/27/2016	Jones, Fred	Training	T24	Complete		Initial Training
1/27/2016	Jones, Fred	Training	T27	Open		Cross-Training
1/28/2016	Jones, Fred	Introductory Review	R21	Open		Introductory
1/28/2016	Soven, Sharon	Training	T31	Open		Re-Training
1/29/2016	Trump, Melania	Introductory Review	R19	Open		Introductory
2/4/2016	Noah, Treavor	Introductory Review	R20	Open		Introductory

7 What's New

7.1 What's New Version D12

Employee Management System Version Information

Vers ion	Date
16.0 029	1/22/2021
	+ Minor adjustments.
16.0 000	6/1/2020
	D12 Initial Release

7.2 What's New Release 1

Employee Management System Version Information

Vers ion	Date
1.00 19	4/13/2018
	+ Added ability for Managers to have up to 10 departments and filtered display of information is based on the departments assigned to the manager.
1.00 08	10/30/2017
	+ Adjustments to creating Job Review master records
1.00 07	10/14/2017
	+ Add option in Review Manager main screen: Set Blank Review Dates to Default. Prior to using this set your "Default" review date in Maintenance...Module Parameters:Dates + Added 'Next Review Date' field to Employee Update Screen. + Adjustments to setting last review and next review dates. + Default job review templates now allow you to enter default comments.
1.00 06	9/29/2017
	+ Adjustment to training expiration report. + When creating new Review items the system calculates the review date based on the employee review frequency. + Added right-click menu to set review dates from main grid.

Vers ion	Date
	<ul style="list-style-type: none"> + Improved performance of displaying the main grid when updating a employee. + Added zero padding to Review and Training event ID's to allow for better sorting in displays.
1.00 05	9/24/2017
	<ul style="list-style-type: none"> + Added training expiration dates, and "Training Does Not Expire" option at the line item level + Added ability to create a blank training event so you can add your own line items.
1.00 04	9/17/2017
	<ul style="list-style-type: none"> + Added Training Expiration date. This shows on the reports and on the What's Due screen. + Multiple training events for a employee can now be created.
1.00 03	8/28/2017
	<ul style="list-style-type: none"> + Adjustments to speed up display of Review Manager screen. + Adjustments for proper definition of path names. + Adjustments to proper linking of training information to employee's + Adjustment to "Create Review" and "Create Training Event"
1.00 02	8/20/2017
	<ul style="list-style-type: none"> Added ability to filter based on a managers department. Added link to this Help file from the main menu.
1.00 01	6/1/2016
	Adjustments for Departments Table
1.00 00	11/23/2015
	Initial Software Release