**Administrator Modules** (these are the modules we would like to see down the left hand side/or across the top? and what we would like to have done within those modules)

**Creator**

Create a Client (example. Tirecraft Ontario)

* We would like to be able to add: their logo, which would show up somewhere for all departments and employees linked with this client in their own accounts when they log on; their address; phone number; billing information which would then link to the billing module;

Create a Department (example. ABC Store)

* This will be really only for Tirecraft, because they have 30 stores, and growing. Here we would like to see these all as part of a client on a hierarchy type model, and then later on each employee would be added to the department

Create a Position

* Here we would add a position, including: title of the position, whether it is Full time or Part time, the training we would like anyone who is given this position to have, wage range, what position the new position reports to, we can assign this position to a client/department; assign the training to the position

Add Employee (example. Joe at XYZ store, part of Client Tirecraft Ontario)

* Employee name, address, start date, SIN, birth date, driver’s licence, home/cell phone number, email address, emergency contact information; we would not like any of these to be “required” to here we HAVE to fill in the field to move on, per each client’s needs; we should be able to assign this employee to a department/client; the offer letter would generate during this step (offer letter optional, can skip this step based on client needs)

**Training**

Add Training

* This is where we would create a new training (video, powerpoint, or pdf document), as well as a test; also an option for them to type a digital signature that they have read and completed something (like a policy), assign a timing for this training to appear for the new employee based on their start date (i.e. Create ABC training to assign on day 1- assigns… XYZ training to assign on month 3- assigns the third month automatically based on the start date, for each position and person this training is assigned to.), a place to input the length of the training module.

Manage Trainings

* Edit exiting trainings, add video, add another test question, add tests at all

**Tasks**

Add Tasks

* Add a tasks which would be a document we want to upload as an attachment, have an employee open up, read, then click an accept and acknowledge that they had read it, or done what was asked button

Manage Tasks

* Create a list of tasks to assign to an employee upon hire

**My Documents**

* In this section we need to be able to: create folders, in which PDF documents can go. Each folder needs to be able to be assigned to a client/department. Need to ensure we can allow only certain departments/positions within a client/department to view its contents. Need to be able to assign which positions/individual employees can add to or remove from this folder.
* Need to be able to create folders inside of folders.
* All folders need to be listed alphabetically, and documents inside those folders, and sub folders need also to be alphabetical and numerically organized automatically

**My Directory**

Client

* click here to get a list of the clients

Department

* click here to get a list of the departments within a searched for client name

Team Members

* search a client/department to get a list of employees in that department/client
* if we click on a team member’s name it takes us to the “Manage my team members” section

**Manage My Team Members**

* search for an employee by name
* once we click the name it will allow us to impersonate that employee
* *Employment History*: edit their employment information, such as department they belong to, wage increases, position changes. This is where we want to terminate an employee (with a screen that asks you to type in the reason for termination), put them on sick leave, maternity leave, seasonal lay off. This would be a running history of their employment over time. Need to be able to go into the training that was automatically assigned to them by their position, and tailor it further for that specific person.
* *Employee Personnel Storage*: a folder that would link to each employee, they would have their own, that only specific positions could access. We would need to have the ability to have sub folders in this main folder (example: performance)
* *Training records*: a list of all of the training that has been completed, a link if there is a scanned and uploaded attachment, the date of completion, expiration date

**Reports**

* Reports by department, client, employee, course for:
  + Incomplete training
  + Completed training
  + Drivers licence: the employee name, current drivers licence number
  + Birthday report: a list of all employees birthdays by department
  + Wage Report: by department for the employee and their position
  + Emergency contact report: by department, of employees and their listed emergency contact and their information
  + Training Times: a list of all the training courses in the system currently and the time it was input that they take to complete

**Billing**

* As per your recommendations, already built