Employee Management System

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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Publisher

Bacon Software

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1 Product Information

1.1 Overview

Overview

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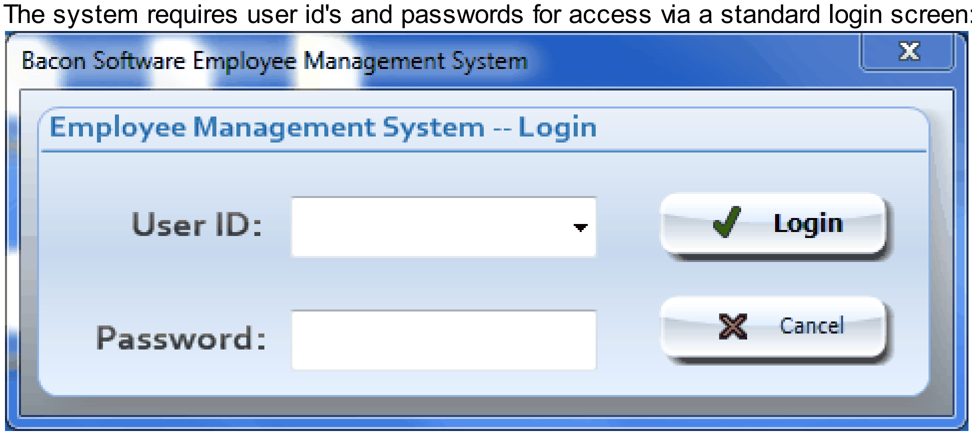
The Bacon Software Employee Management system is a table driven system for company employee related functions including:

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...

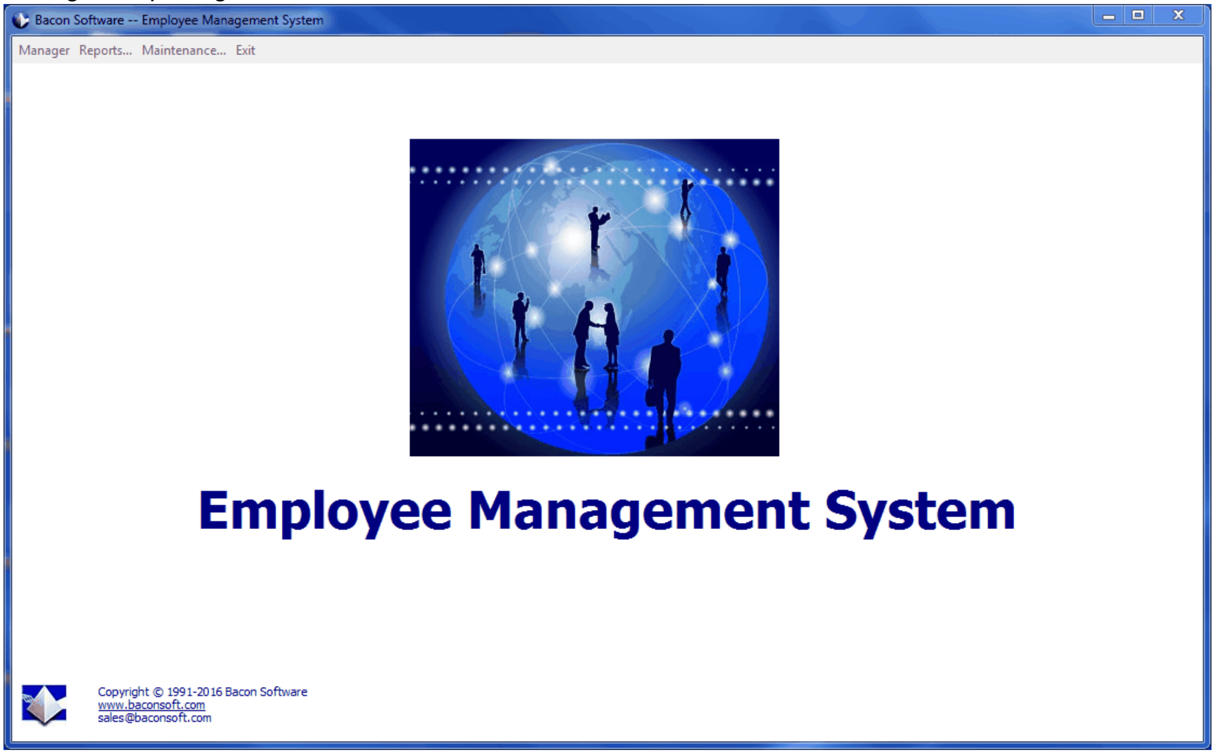
1.2 Login

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



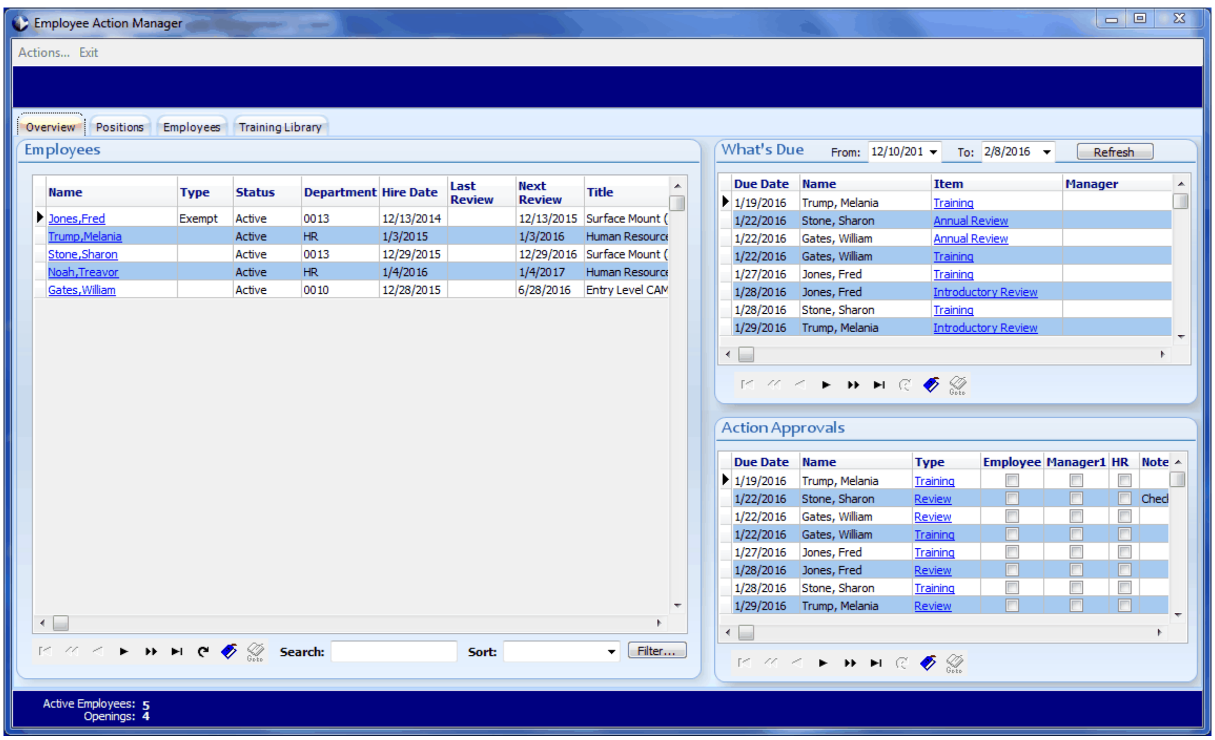
1.3 Main Menu

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

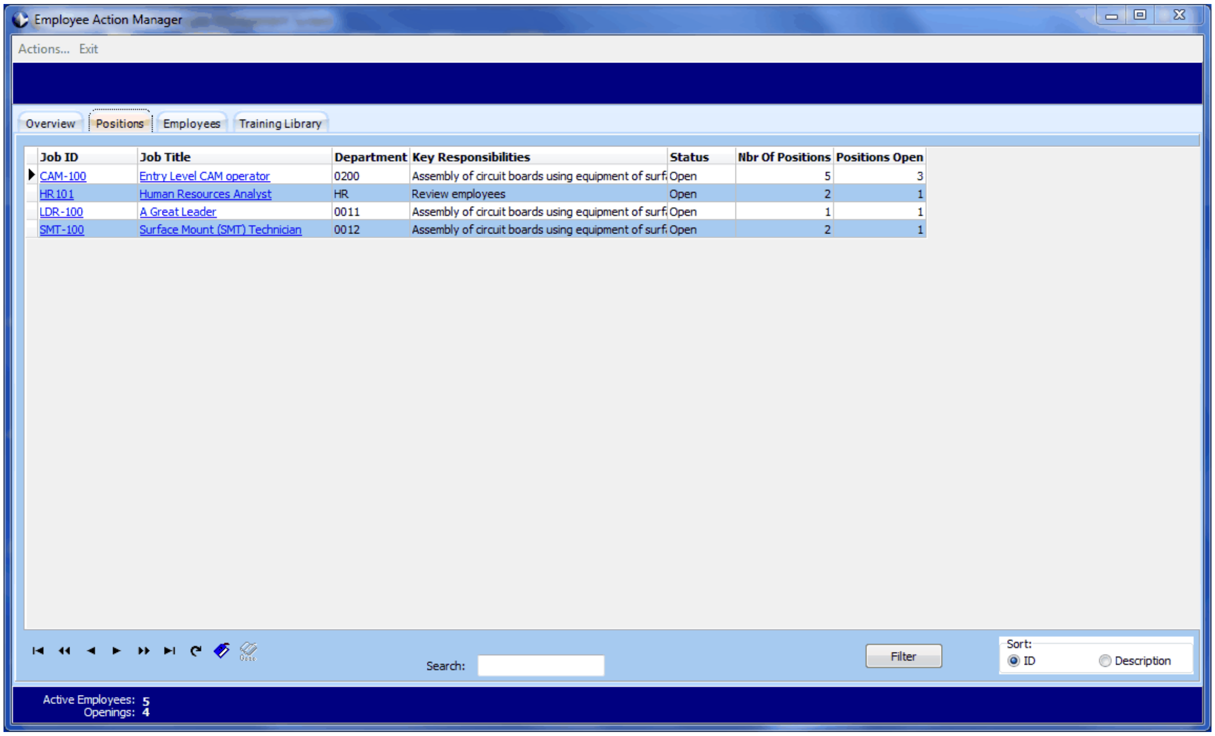


1.4 Employee Action Manager

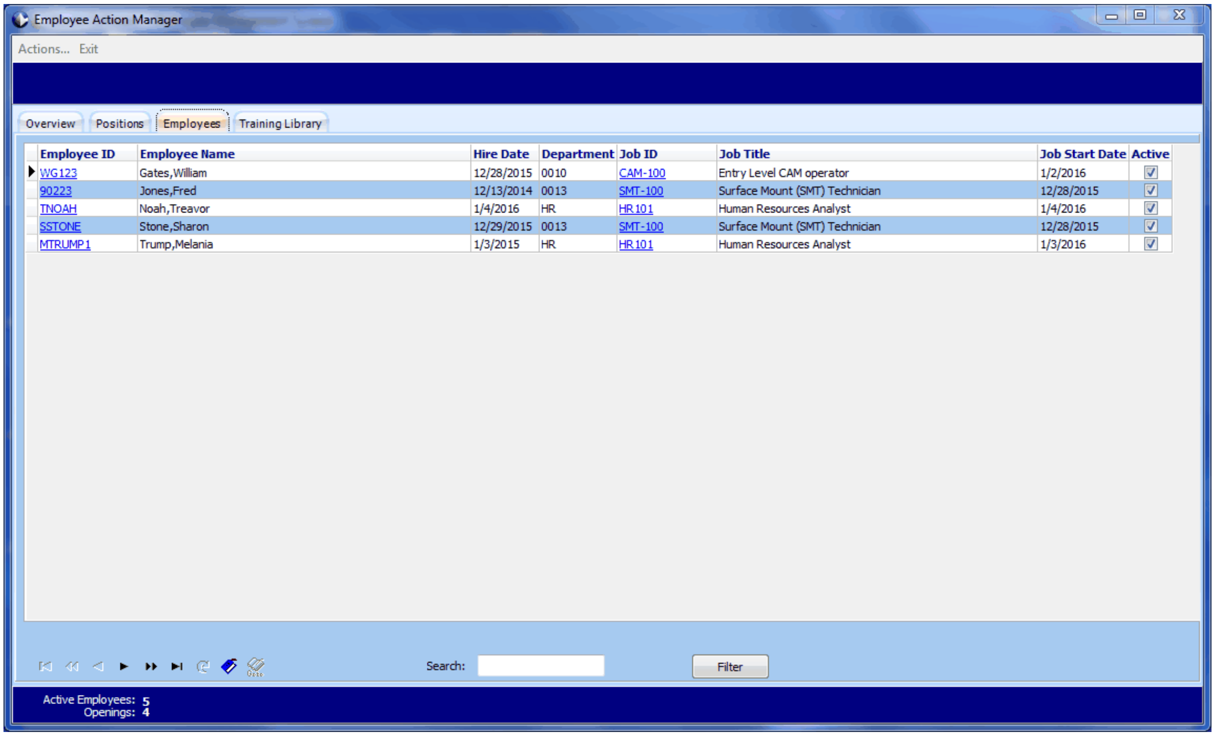
The Employee Action Manager provides up-front information and direct access to functions required including Performance Reviews, Training Records, Employee Updates, etc.
The Employee Action Manager "Actions..." menu is used to create items in the system including:
Add New Employee
Add New Job Description
Create/Update Employee Performance Reviews
Create/Update Employee Training Events



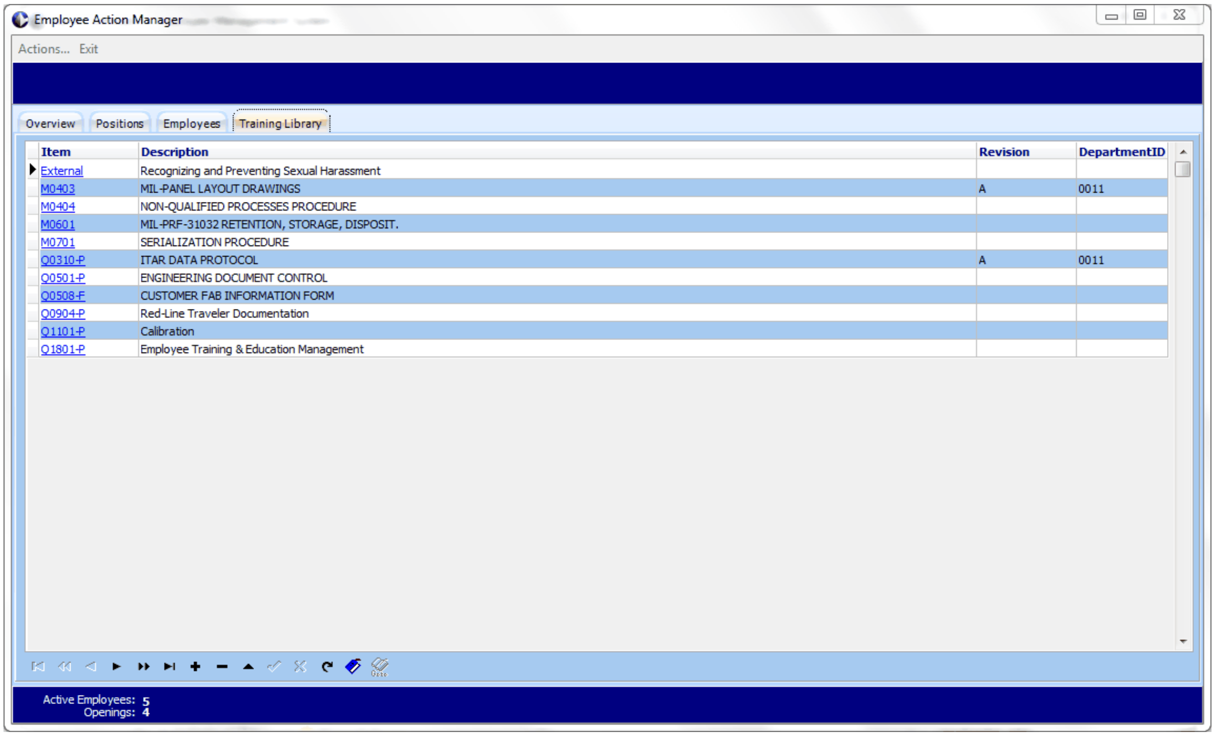
The **Overview** Tab displays the following:
1. A list of employees with key information. You can click on the Employee Name to edit a employee.
2. A list of items that are due, such as Training and Performance Reviews. You can click on the item to edit it.
3. A list of actions that are in various stages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



The **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.



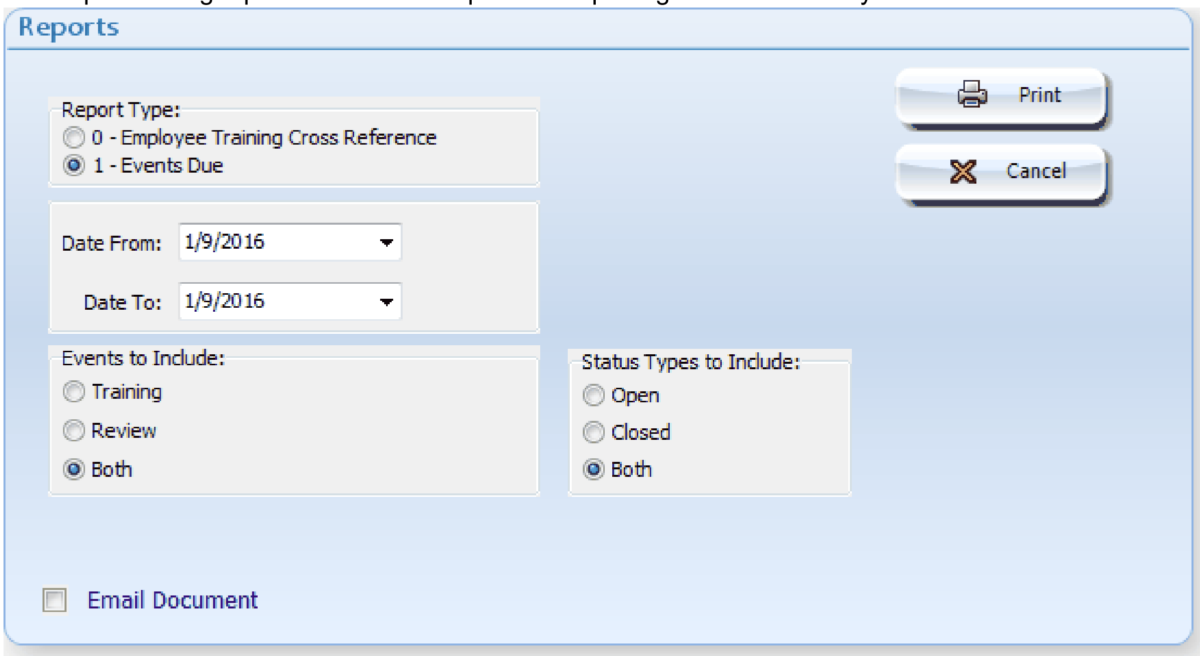
The **Employees** tab lists all employees in the company and their current position. You can click on the Employee ID to update the employee information. You can click on the "Job ID" to update the job listing information.



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.



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

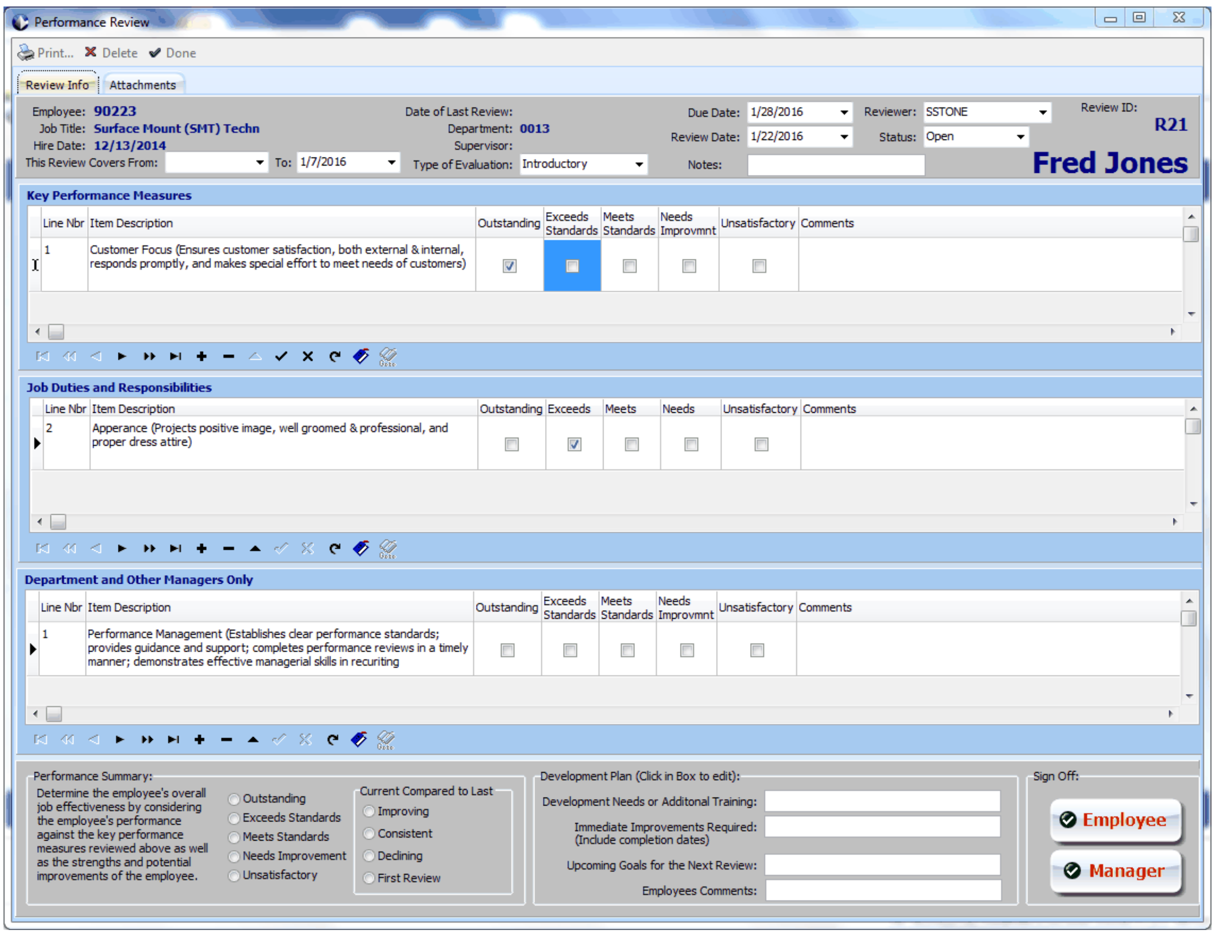
Performance Review

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.



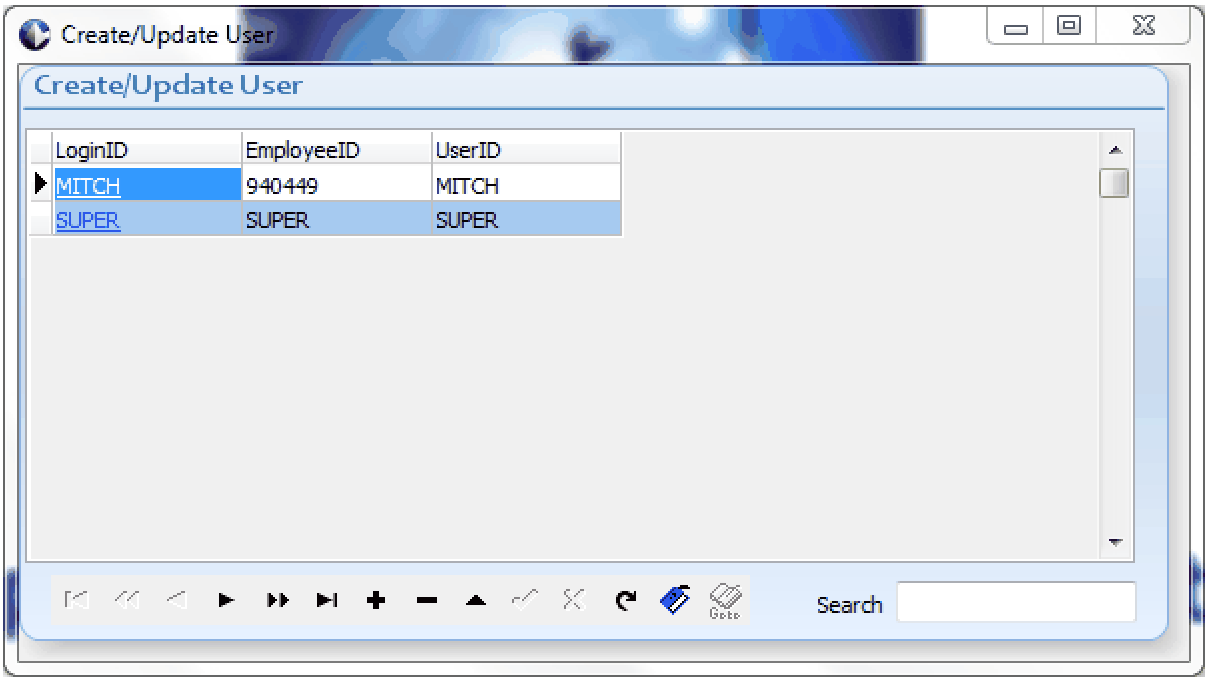
2 Using the Employee Manager System

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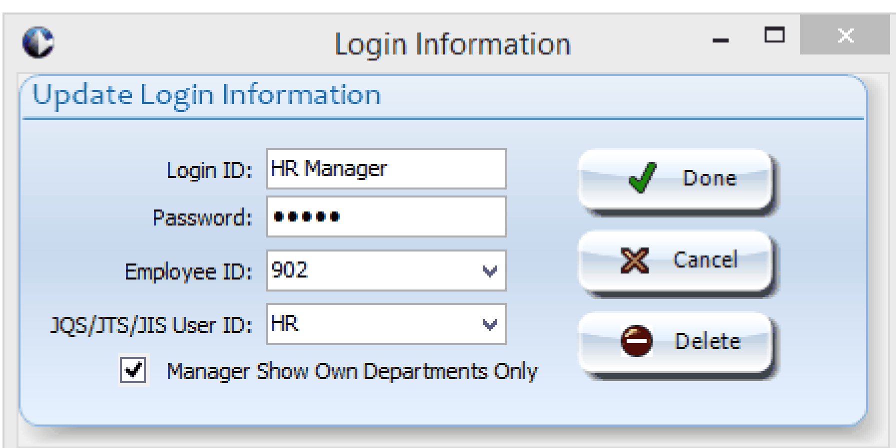
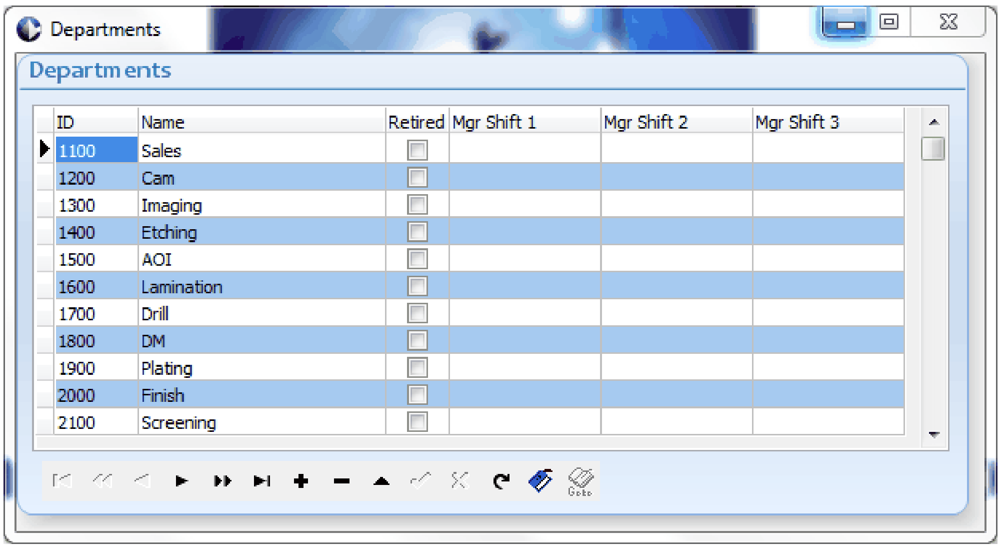
You can add users by clicking the + button below the grid. If you click on the "LoginID" link the login update screen will display where you can select Employee and User information.



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.

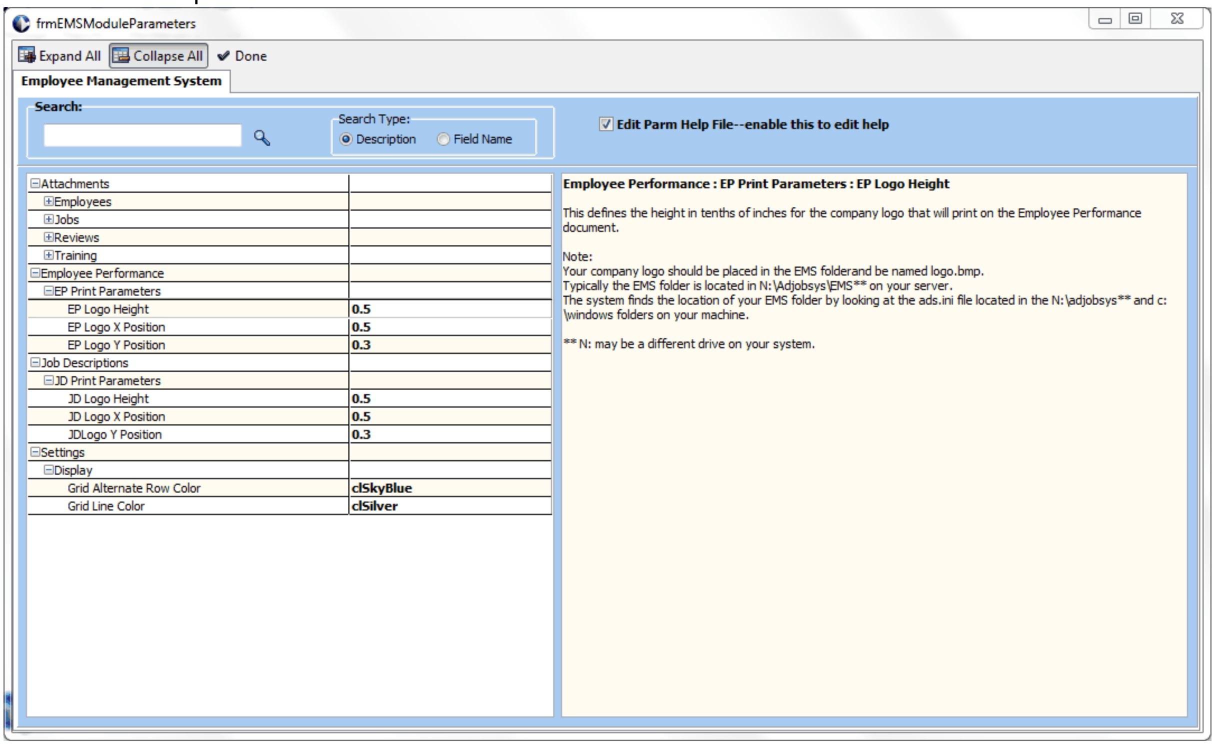
2.1.2 Setting Up Departments

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



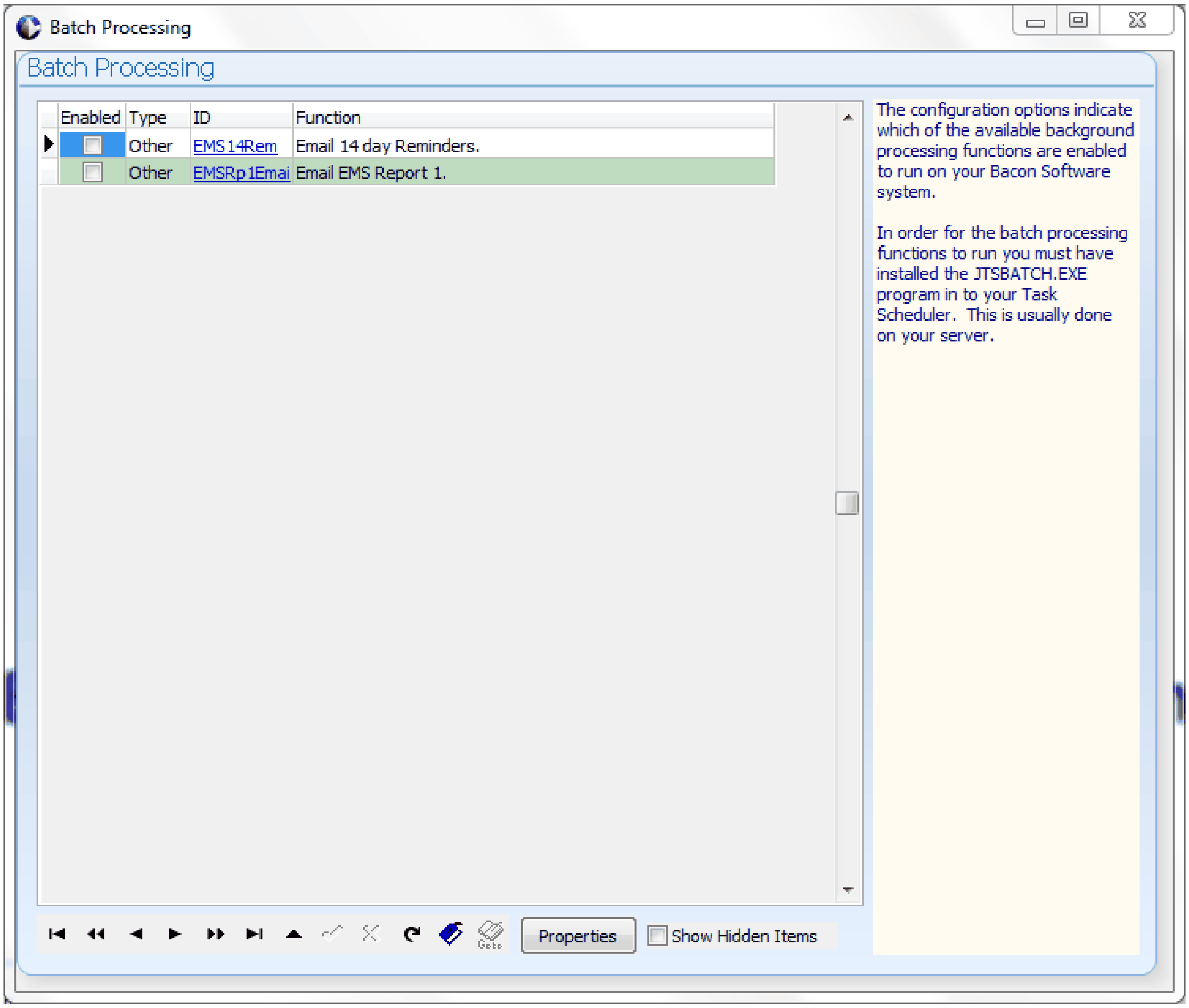
2.1.3 Module Parameters

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.

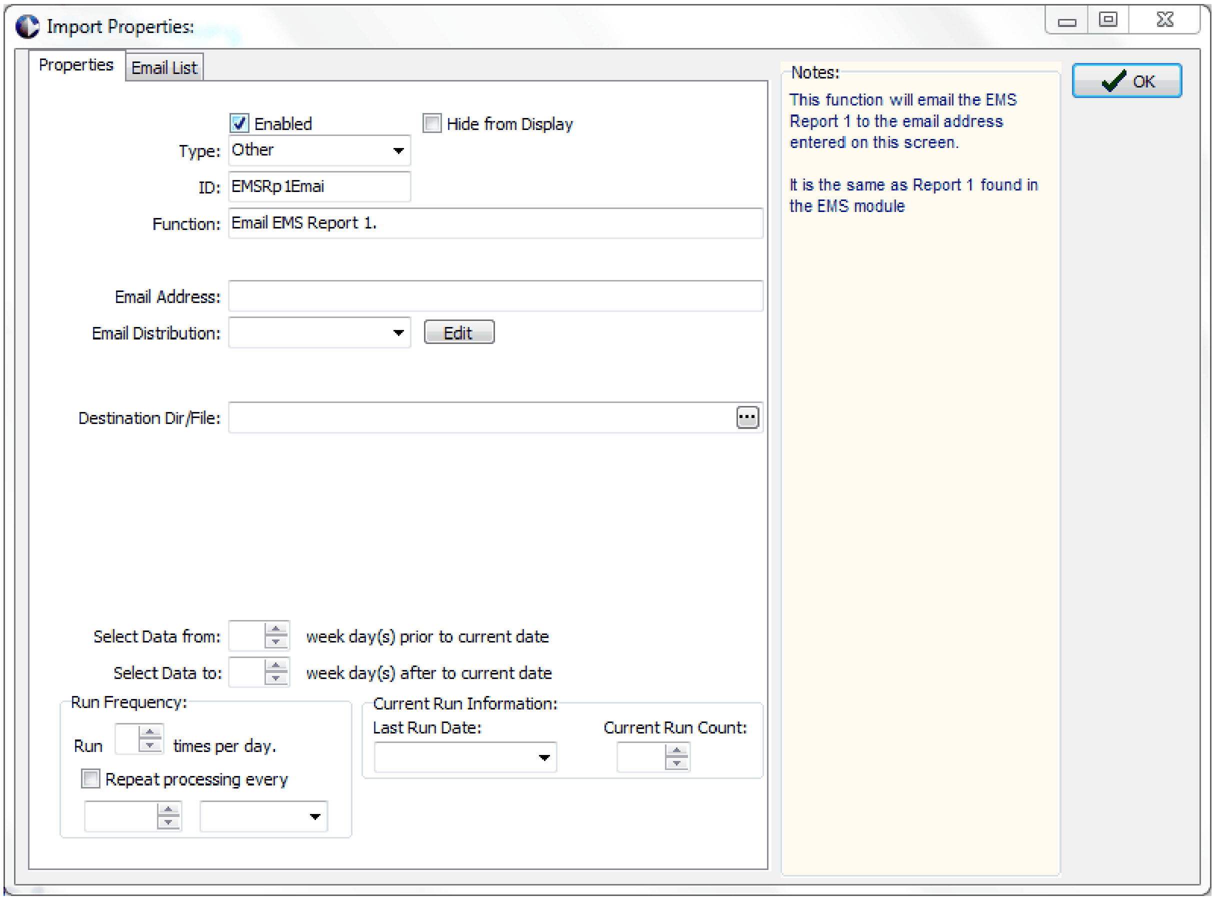


2.1.4 Batch Routines

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.



Running Batch Routines.

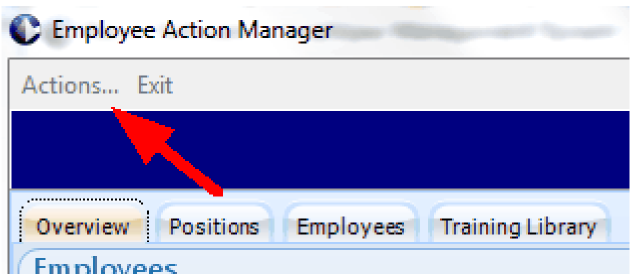
Run the JTSBATCH.EXE program located in the \adjobsys folder of your system.
You can use the Microsoft Scheduler to schedule JTSBATCH to run at daily intervals. The JTSBATCH program will then review your settings for the batch functions and run them based on the "Run Frequency" parameters you have configured 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.**



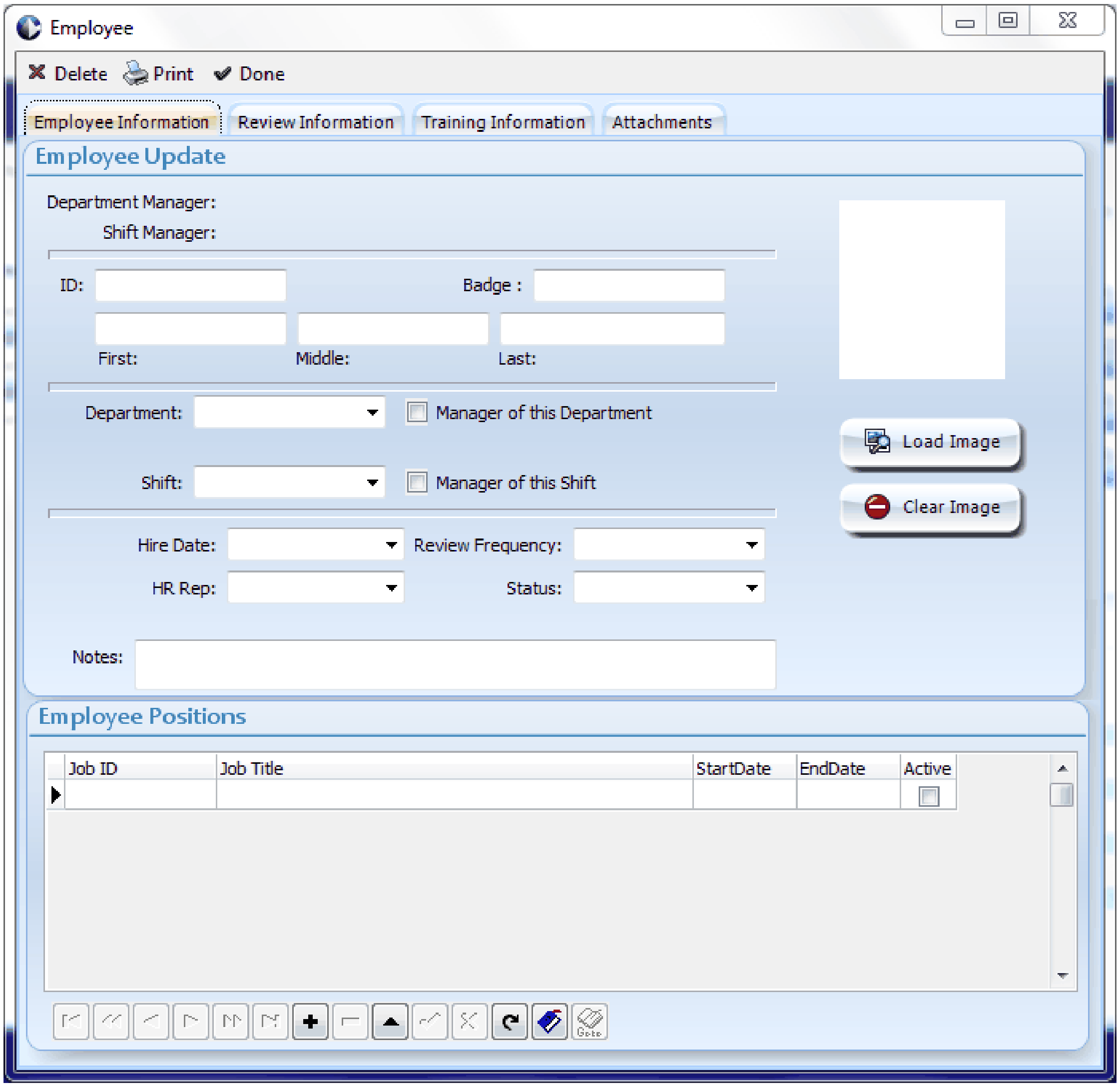
The Employee Update screen displays where you can enter employee information.
The tabs at the top of the screen allow you to view information about the employee:
"Employee Information" - Personnel information and Job Positions
"Review Information" - a history of all performance reviews
"Training Information" - 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.

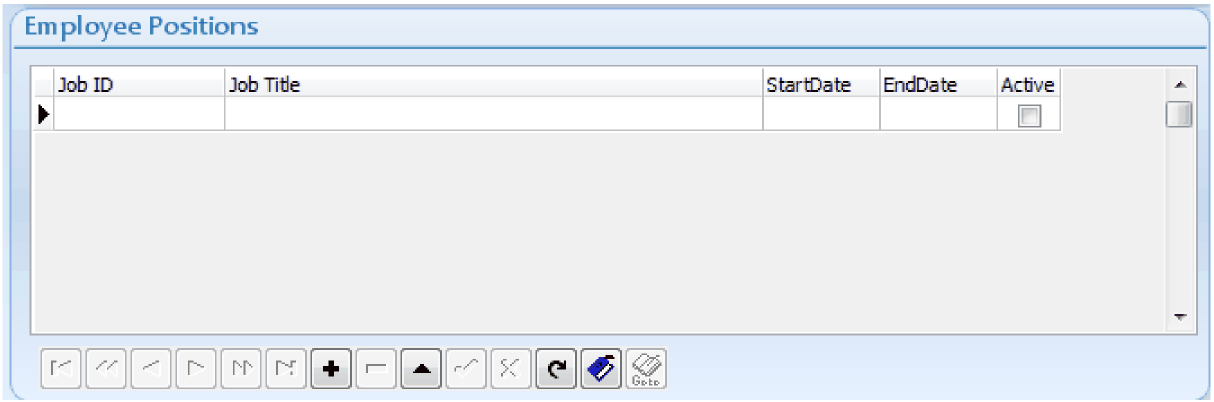
Field	**Information**
ID	A unique ID for each employee, such as the Employee Number from your payroll system.
Badge	A Badge number for the employee. This can be the same as the employee number but should be a number that is not public information. The employee will be asked to supply this number when 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.


Employee
Delete
Print
Done
Employee Information
Review Information
Training Information
Attachments
Employee Update
Department Manager:
Shift Manager:
ID:
Badge :
First:
Middle:
Last:
Department:
Manager of this Department
Shift:
Manager of this Shift
Load Image
Clear Image
Hire Date:
Review Frequency:
HR Rep:
Status:
Notes:
Employee Positions
Job ID
Job Title
StartDate
EndDate
Active

2.2.2 Assigning Job Positions to Employees



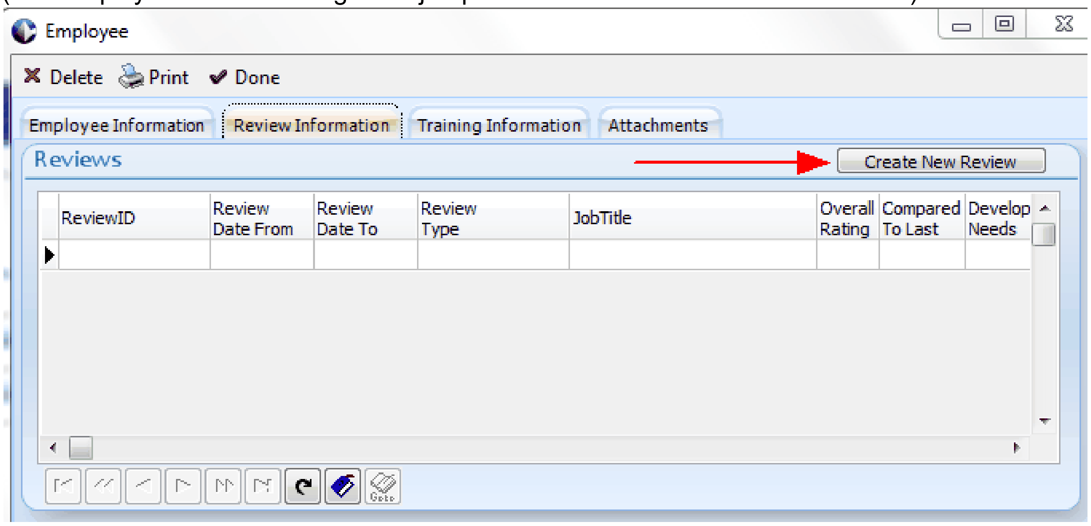
You can assign a job position to the employee by clicking in the "Employee Positions" grid in the bottom portion of the screen. Add a position by clicking the "+" "VCR" type button below the grid or by using the down arrow to cursor to a blank line. Click in the "Job ID" column to select a position for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

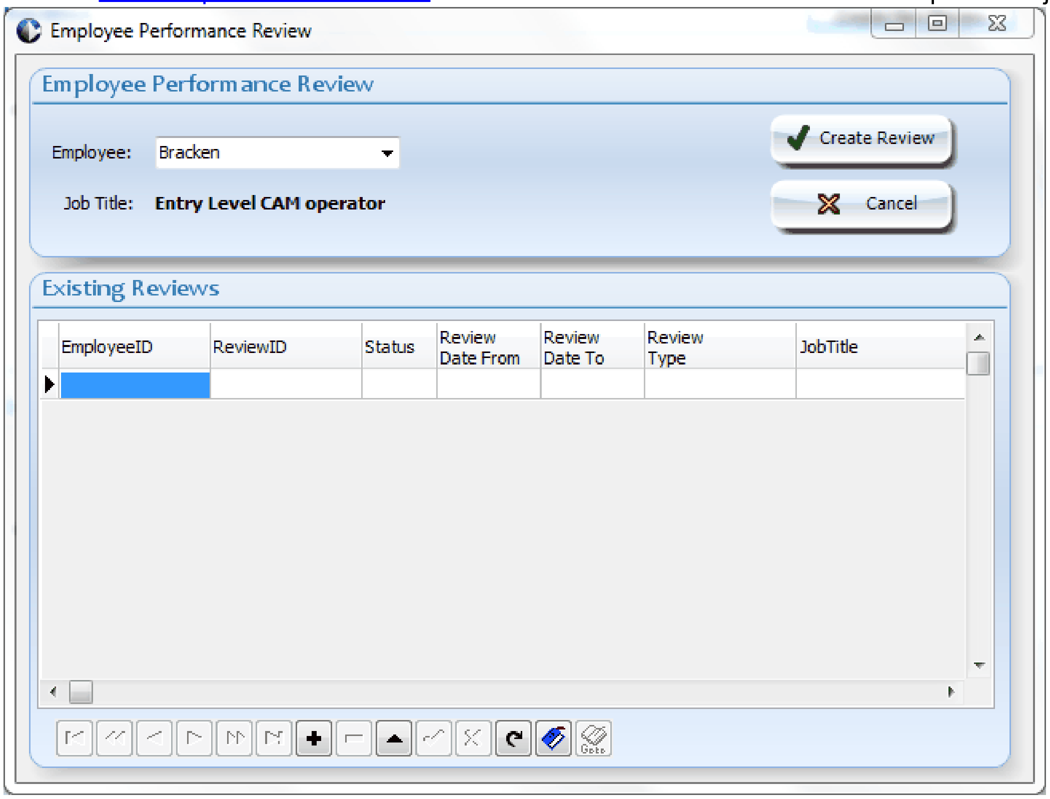
2.2.3 Create/Update Employee Performance Appriasals

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.

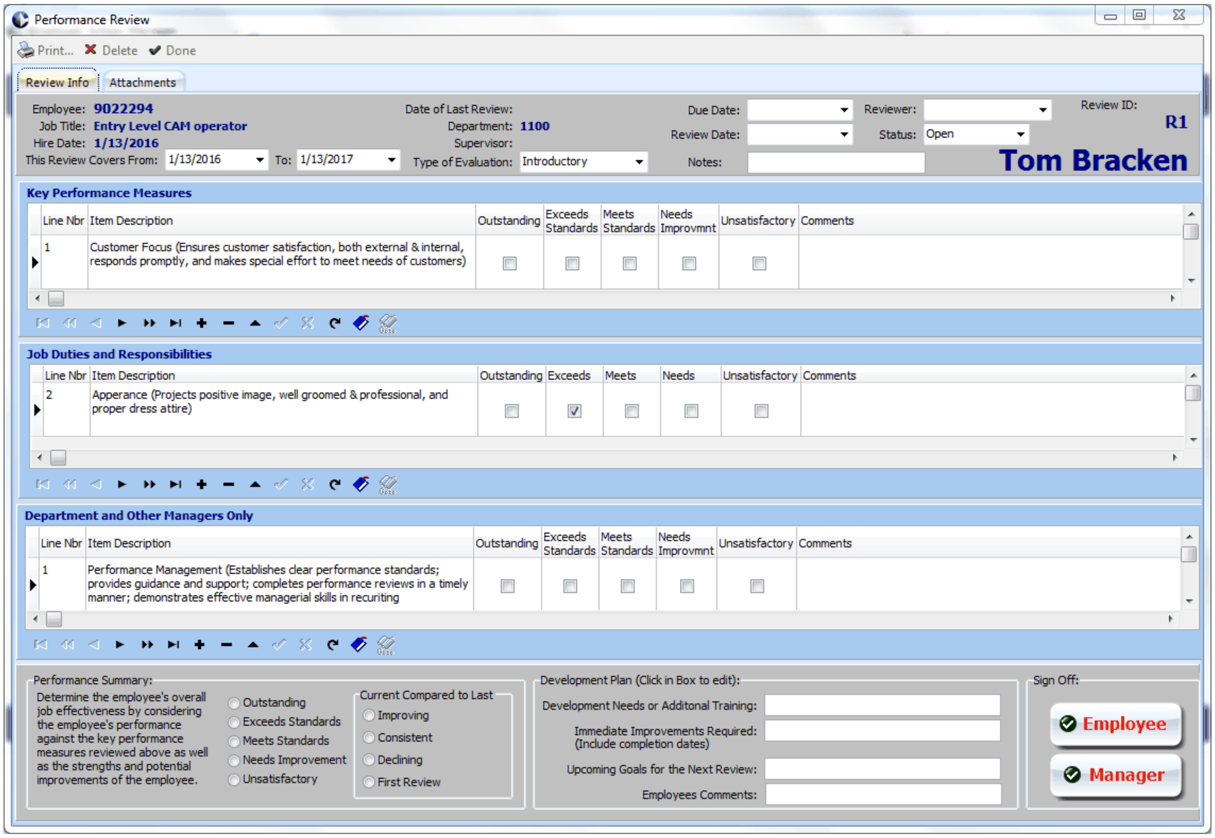
To create a new Appraisal click the "Create new Review" button on the screen.
(The Employee must be assigned a job position before a review can be created).



The 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.



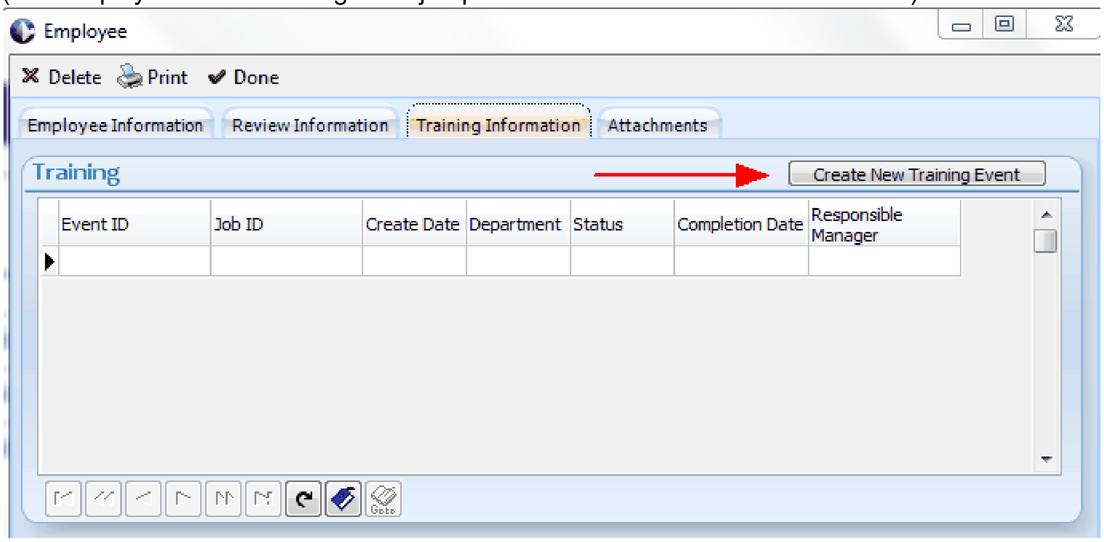
The employee review screen will display and the review information can be setup. When the actual review is conducted you can access this screen again either from the Employee Update screen or from the Employee Manager. Refer to Conducting Employee Reviews for more information.



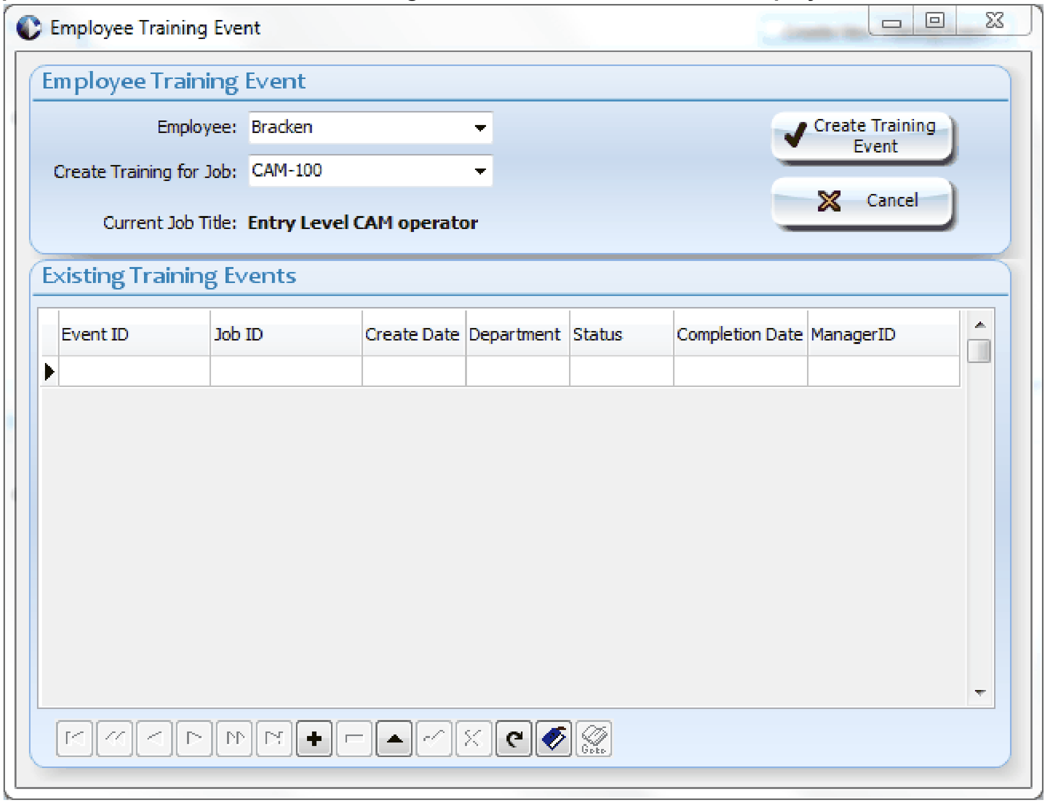
2.2.4 Create/Update Employee Training Events

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.

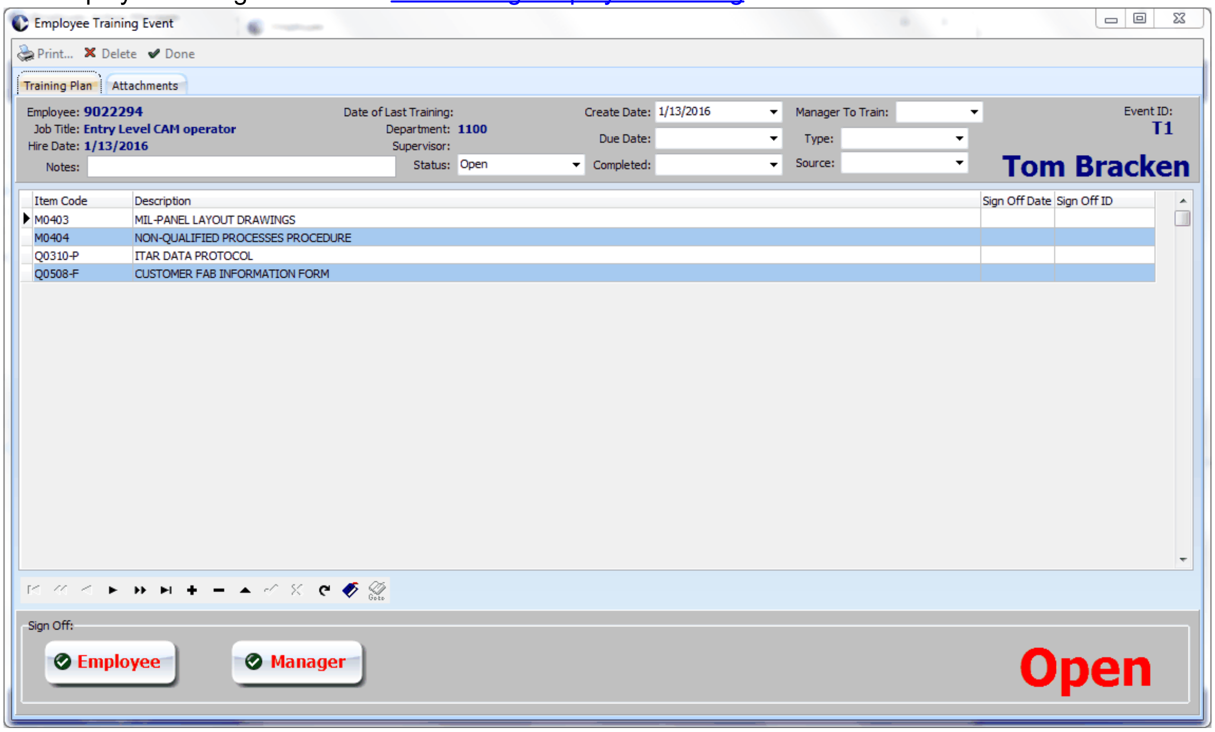
To create a new Training Event click the "Create new Training Event" button on the screen. (The Employee must be assigned a job position before a review can be created).



The 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 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.

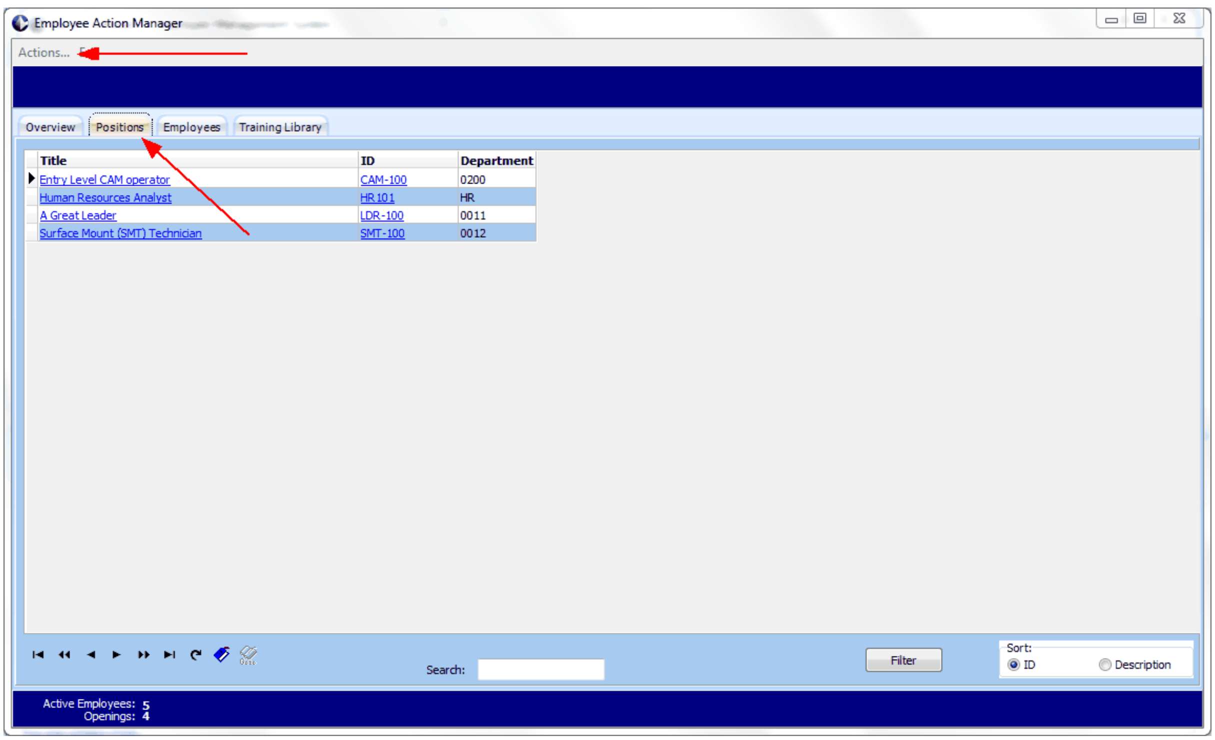


2.3 Job Positions

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.

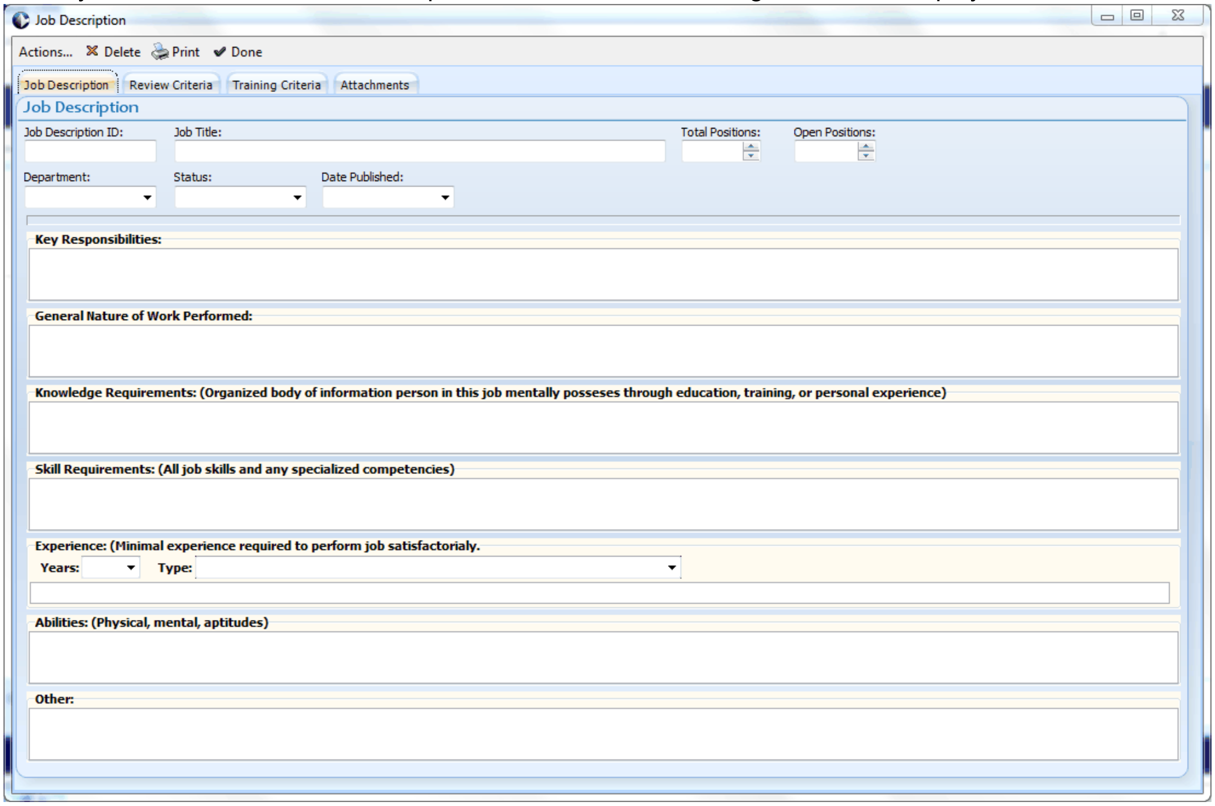
You can review the positions in the company by clicking on the "Positions" tab of the main Employee Manager Screen:
You can click on the "**Actions...**" menu and select "**Add Job Description**" to add a new Job Description in the system.

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:



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 - your 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.

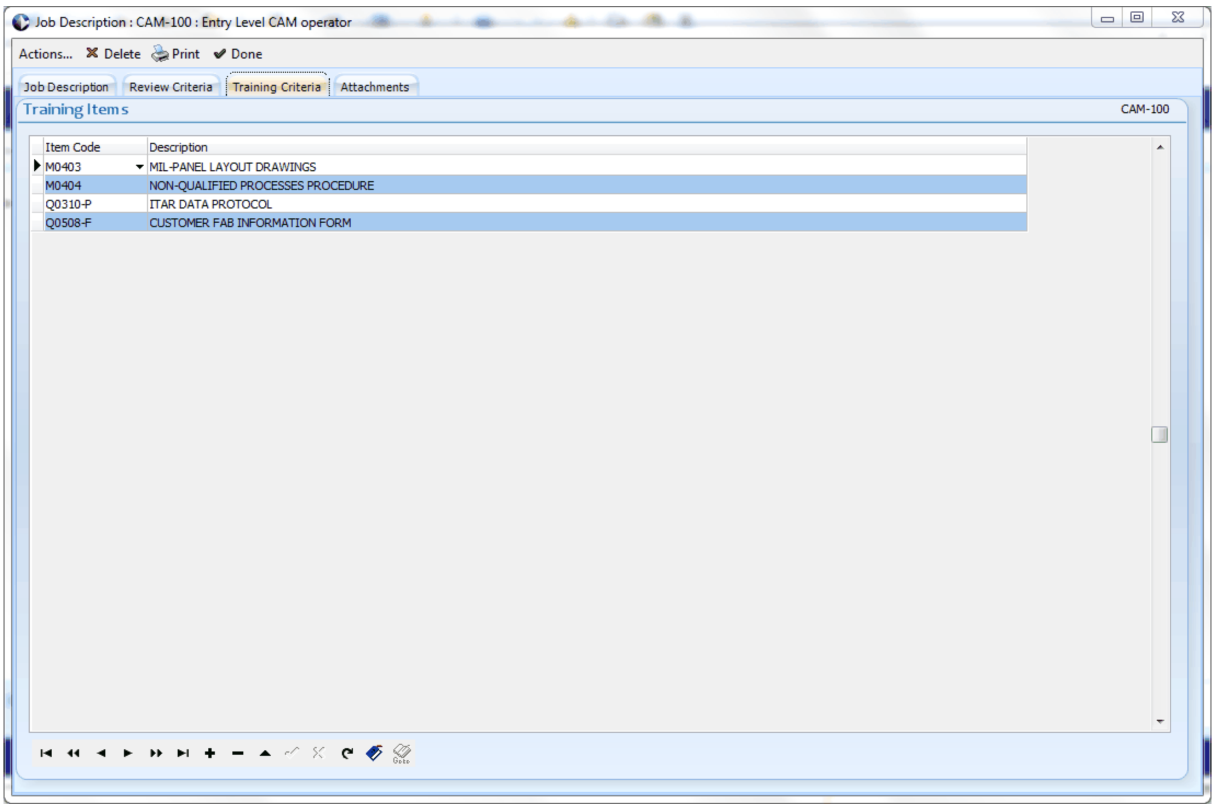
Key Responsibilities	Enter the key responsibilities for a employee how fills this position.
General Nature of Work Performed	Describe what type of work.
Knowledge Requirements	Describe any training and knowledge the employee needs to posses prior to having this position.
Skill Requirements	All job skilss 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.

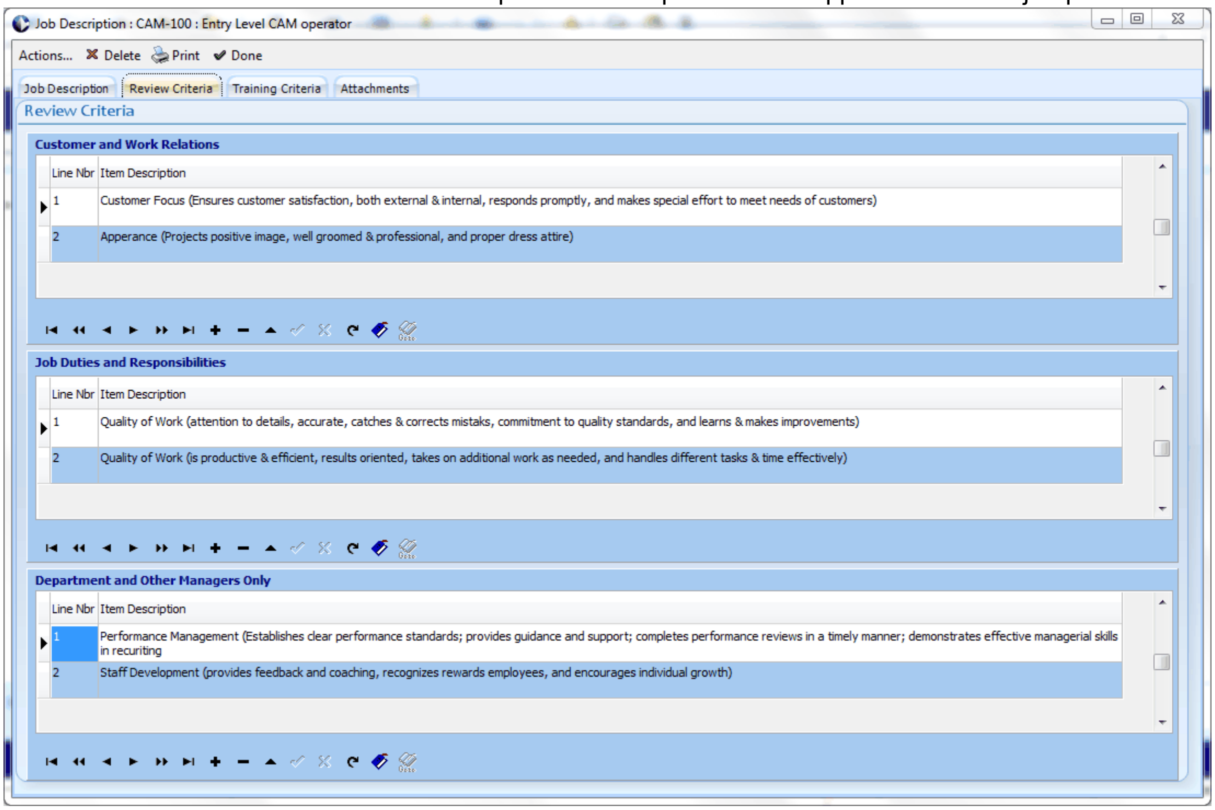
In this manner you build the "Default" training requirements for the job position. When you elect to create a training event for a employee the system copies the list from this screen and links it to the training event created for the employee. You can then adjust the actual training event requirements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



2.3.4 Attaching Documents to Job Positions

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

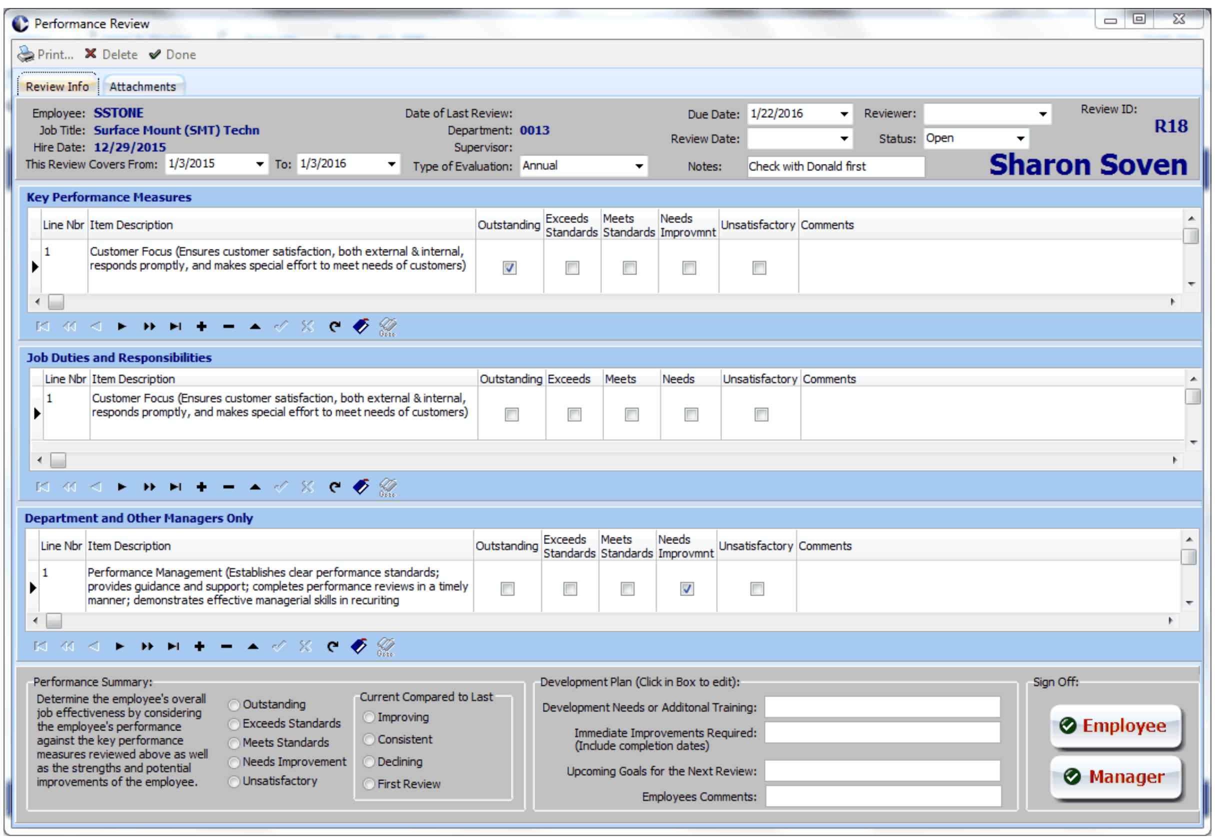
3 Employee Performance Reviews

3.1 Conducting Employee Reviews

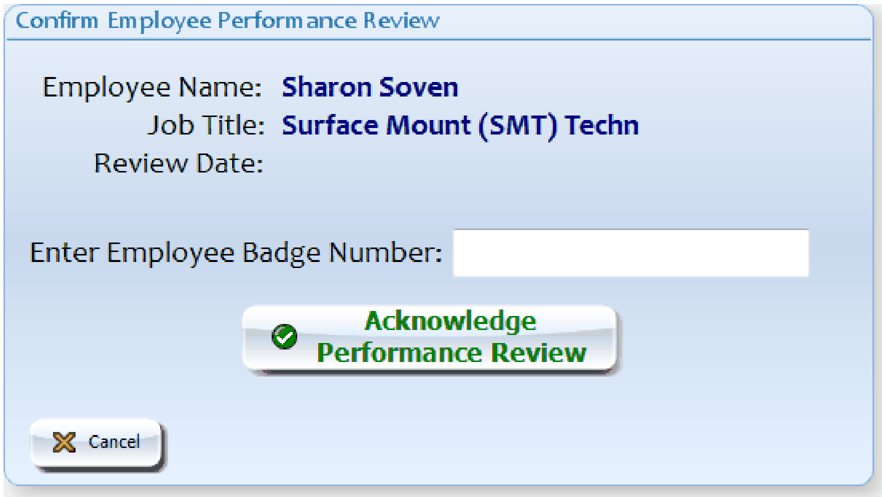
Prior to conducting the review, the review should be created for the employee.
Refer to Create/Update Employee Performance Appriasals for details.

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.



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

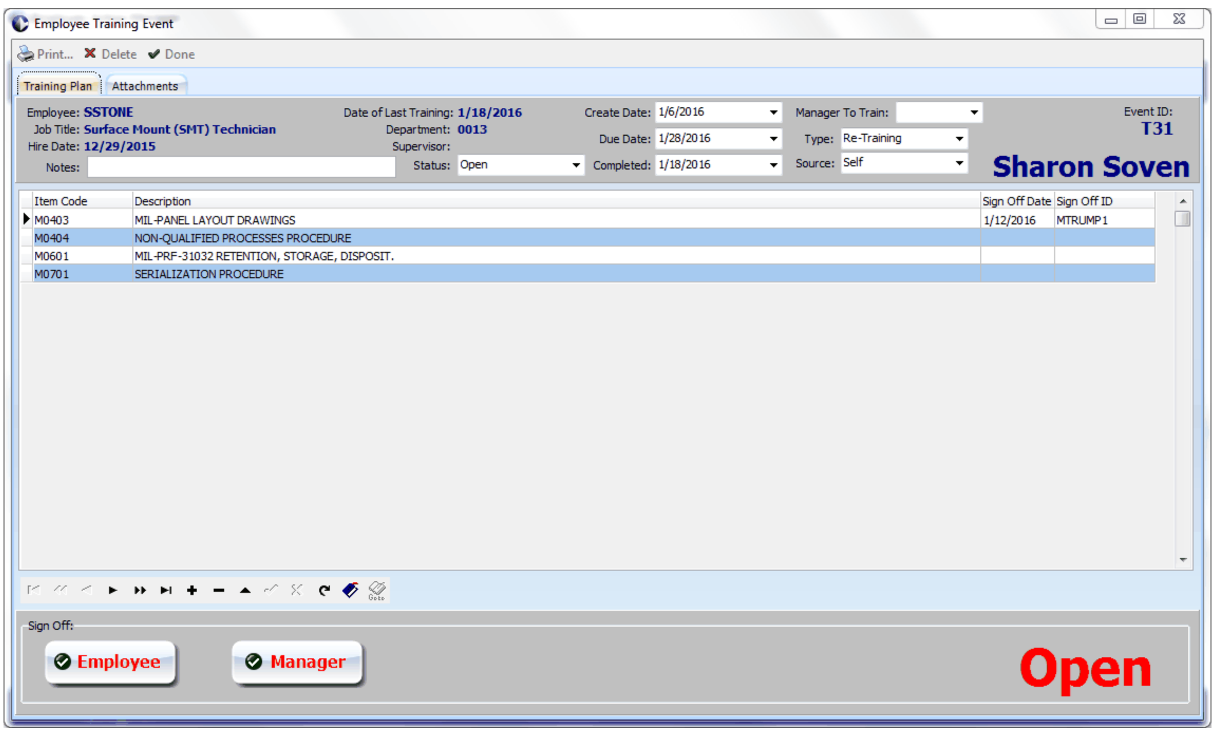
4 Training Events

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.

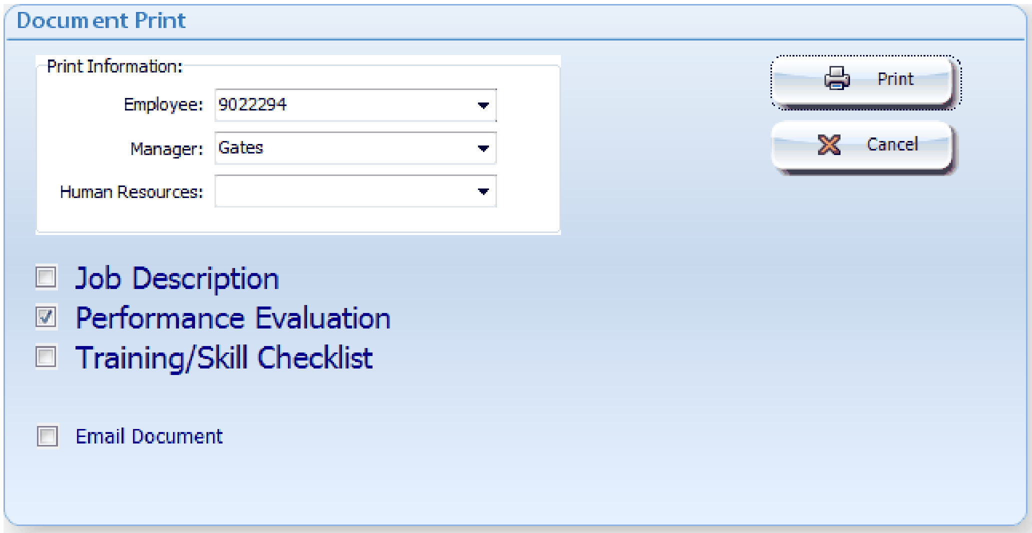
The "Training Plan" screen displays the Training Items defined for the employee/Job Position. You will conduct the training with the employee and check off the appropriate selection for each item on the screen. Indicate a "Performance Summary" selection and "Current Compared to Last" selection. Complete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



5 Print Documents

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

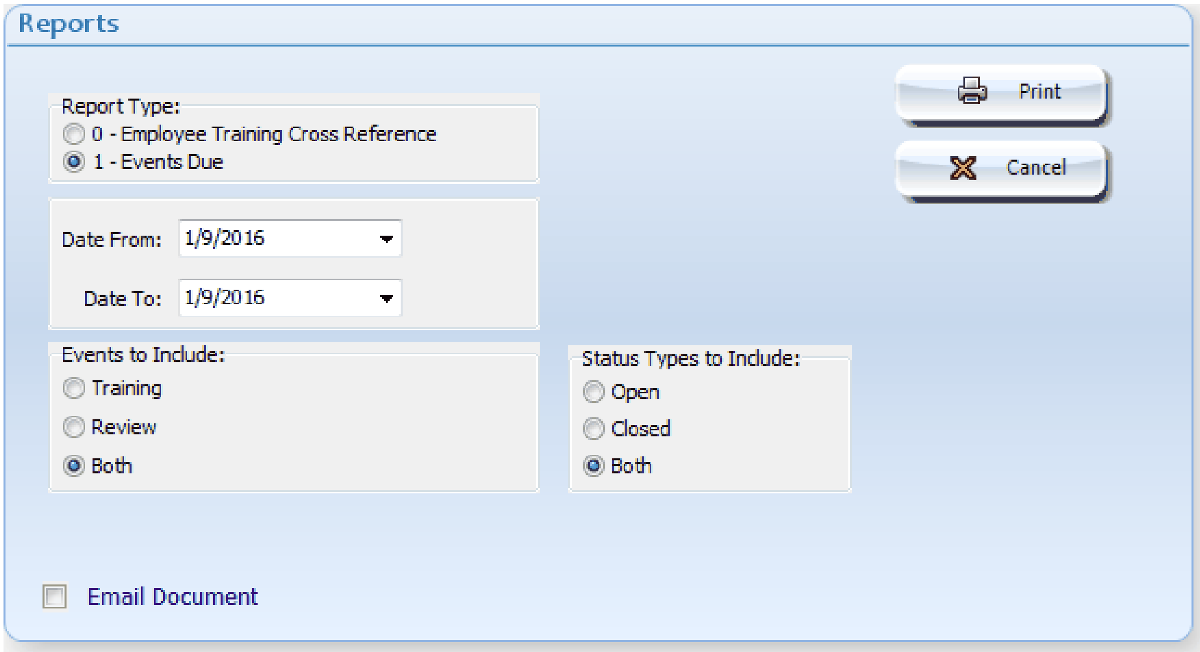
Job Descriptions
Performance Evaluations
Training/Skill Checklist



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

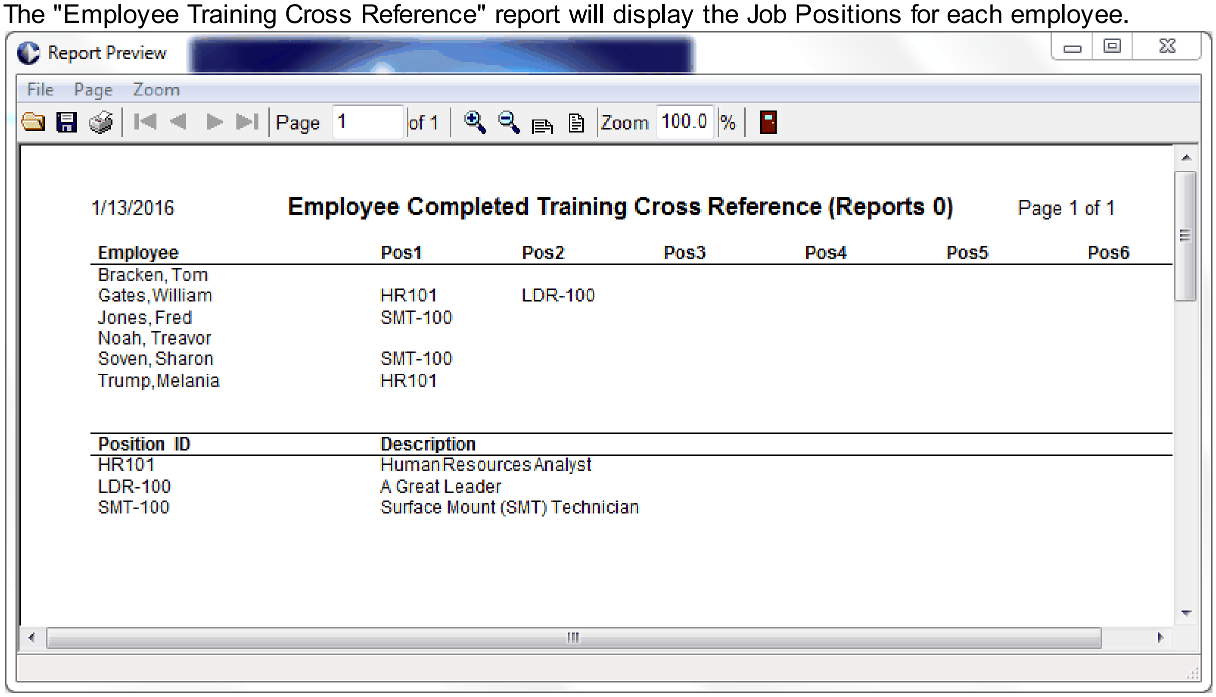
6 Reports

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



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.

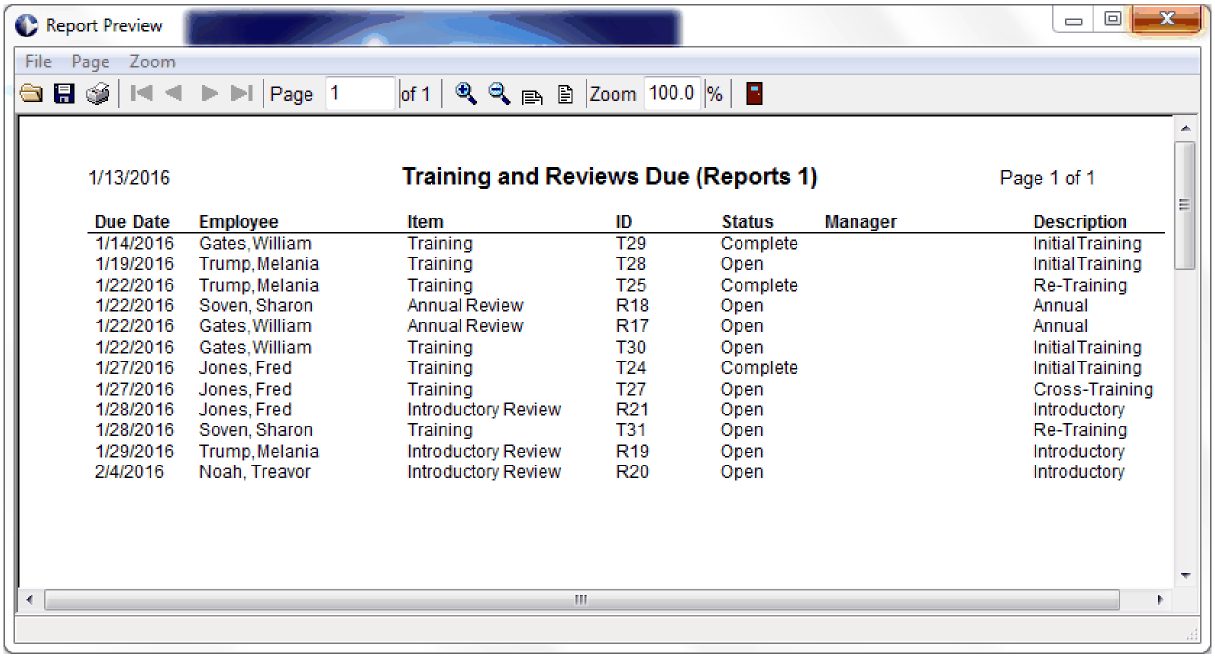


1/13/2016 **Employee Completed Training Cross Reference (Reports 0)** Page 1 of 1

Employee	Pos1	Pos2	Pos3	Pos4	Pos5	Pos6
Bracken, Tom						
Gates, William	HR101	LDR-100				
Jones, Fred	SMT-100					
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.



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

Version	Date
16.0029	**1/22/2021**
	+ Minor adjustments.
16.0000	**6/1/2020**
	D12 Initial Release

7.2 What's New Release 1

Employee Management System Version Information

Version	Date
1.0019	**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.
1.0008	**10/30/2017**
	+ Adjustments to creating Job Review master records
1.0007	**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.
1.0006	**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.

Version	Date
	+ 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.
1.0005	**9/24/2017**
	+ 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.
1.0004	**9/17/2017**
	+ 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.
1.0003	**8/28/2017**
	+ 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"
1.0002	**8/20/2017**
	Added ability to filter based on a managers department. Added link to this Help file from the main menu.
1.0001	**6/1/2016**
	Adjustments for Departments Table
1.0000	**11/23/2015**
	Initial Software Release