Human Resource Manager

User Manual

by software techniques®

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Diamond Edition Software Installation Guide

Installing Diamond Edition Software

1. Download the installation files.

2. Unzip the files at the computer on which you wish to install.

3. Run startup.exe – you can accept all the defaults (if you change the default destination folder, take note of it).

4. Once the installation is complete, you will need to run the Database Administrator tool to connect to an existing database or create your initial database. While a shortcut will be available on the desktop, you will access the DBAdmin tool via the:
Start Menu | All Programs | Diamond Edition | Tools | Database Administrator.

5. At the login window, click on the Configure button. If your company already has a database, you will point the program to that location (for instance N:\Data where "N" is a mapped network drive, and Data is a shared folder on the network). You will point to the folder just above the ODBC folder as the Common Directory. [You may need to consult with your company IT Dept for the Common Directory path, or you may be able to obtain it from the login screen of a computer already successfully running Diamond Edition Software.]

6. If you are running this program for the first time in your company, you can point to the location of your choosing for the Common Directory (on the network if you plan to share the database within your company, or locally on the computer's hard drive if this is to be a stand-alone program & database). If this is the case, you will select next until you reach a list of missing tables at which point you will click on the checkbox next to "Fix All" (you will do this at two points during the DBAdmin process). When you click finish, you will have an empty database into which you can begin entering company and employee information. You may need to enter an Activation Code to confirm your license.

7. If you have pointed DBAdmin to an existing database, you will select Next throughout the balance of the DBAdmin process. If you receive any errors or are warned of database incompatibility, then you may not be pointing to the proper Common Directory location, or your database is of a different vesion than the program you have installed. You will need to call us for further instructions if that occurs.

8. Upon completion of DBAdmin, you will be returned to the login screen. You may hit Cancel to close this login window since you will still be in DBAdmin mode and will not need to launch that now that you have configured the program.

9. Launch the program from the shortcut on the desktop. Log in with the User Name and Password provided to you by whomever administers the program for your company. (New/blank database users can log in with Admin and no password to begin setting up the system.)

Continued on Next Page

Solutions to Common Problems During Installation or Launch

If you encounter an error trying to run the program (such as "Invalid Resource File" or "Cannot Update Cursor"), the following adjustments to User Access Control and/or Folder Permissions will need to be made: [Please note that a network administrator or other IT person may need to participate in order to allow these changes or to fine-tune them to comply with your company's security guidelines.]

Diamond requires that User Access Control (UAC) in Windows be set to "Never Notify" – this is done via Control Panel | User Accounts | Change User Account Control Settings. Drag the slider all the way down to the bottom, select OK, and then reboot the computer.

All users of the Diamond program on any particular computer will need Full Control at the application directory which would be C:\Program Files (x86)\SoftwareTech unless you changed the destination folder during the installation. To set permissions, right-click on the SoftwareTech folder, select Properties, click on the Security tab – All Users should be given Full Control.

If you encounter an error during login (such as Invalid ODBC Connection or Invalid Path), then you may not have sufficient Network Privileges to access the shared database, or you may not have the correct path to the Common Directory specified. Your company's Network or System Admin should be able to resolve this for you.

If you encounter an error referencing missing dll files, Resource File Version Mismatch or Visual FoxPro Support Library, then you likely need to download the following and unzip it into your local Windows\SysWOW64 directory and/or where your Diamond Edition Software exe file is located: http://www.stisupport.net/support/VFPDLL.zip

Remote Support is Available

We provide remote support via GoToAssist which allows us to connect to a computer at your location using an Internet connection. Remote support sessions can be scheduled by calling the office at (540) 721-1000. The computer to which we will connect must not only have Internet access, but also access to any shared network resources required (i.e. when the Common Directory is stored on a network server) as well as rights to allow the running of remote connection software. What follows are directions for initiating a Remote Support Session with us.

Continued on Next Page

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Diamond Edition Software Installation Guide

Remote Support Continued

Please click on the following link to log in for remote assistance:

http://www.gotoassist.com/ph/softwaretech

The page displayed will look like this and you will need to fill in all three text boxes or you will generate an error. Please be sure we can identify you and your company by the names you choose.

Live Remote Assistance

Do you need a quick solution to a technical problem? With our live remote-assistance tool, a member of our support team can view your desktop and share control of your mouse and keyboard to get you on your way to a solution.

How to Get Support

You will find the answers to security questions and system configuration requirements on our FAQ page. You can also view a demonstration of a screen-sharing session.

How It Works

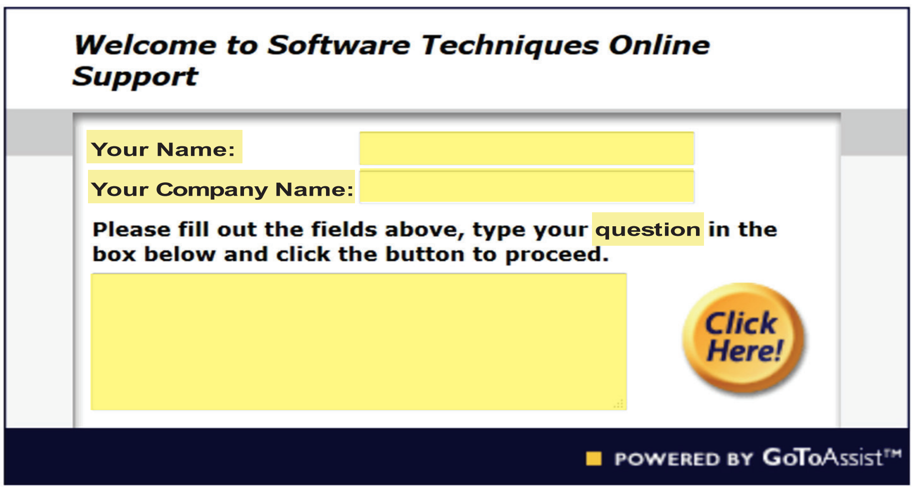
Step 1: Simply type your question or the nature of your problem in the box. Then click the button to proceed.

Step 2: You are prompted to download a small virus-free plug-in which will connect you to a member of our support team.

Step 3: Your support representative will chat with you online to obtain the details of the problem.

Step 4: With your permission, your support representative can view your screen and share control of your mouse and keyboard.

Step 5: You are in full control of your computer at all times. You always have overriding control of your mouse and keyboard, and you can end the screen-sharing session at any time.



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Chapter 1 Introduction

This Manual Covers

- Installing *HR* and importing information from other database programs
- Setting and maintaining organization information
- Entering and maintaining employee data
- Producing reports
- Trouble shooting

Installation and Setup

For system requirements and installation instructions see *Chapter 2 – Installation and Setup*.

Background Information

To establish setting up and maintaining your system environment information, see *Chapter 3 – Getting Started*. To setup and maintain organization information see *Chapter 4 - Establishing Organization Information.* To add and maintain employee data see, *Chapter 5 – Establishing Employee Information.*

Basic Operation

To learn how to perform the most frequently used *HR* functions, see *Chapters 6 – Tools.*

Reports

To see common information general to all reports, see *Chapter 7 – Reports.* To review Employee Reports, see *Chapter 8 - Employee Reports.* To review Organization Reports, see *Chapter 9 - Organization Reports.*

Utilities

To review *HR* Utilities, see Chapter 10 – Utilities.

Trouble Shooting

For fast help with common problems, see *Chapter 11 – Trouble Shooting*.

A Windows® Program

HR runs under the Microsoft Windows® Operating System. This manual assumes that you know how to perform routine mouse and keyboard operations in this environment.

Conventions Used in this Manual

In this manual, we put [square brackets] around keyboard keys you must press, such as function keys [F1], the [Tab] key, the [Enter] or [Return] keys. Prompts (messages and ***HR*** displays on screen) are shown with this typeface. Information you enter into data fields is shown with *this typeface*.

Chapter 2 Installation and Setup

This chapter familiarizes you with the minimum and recommended system requirements necessary to run *HR*.

The Installation Procedure is covered in detail. It leads you through the basic install steps and then follows with advanced setup procedures. If you have questions concerning the installation or setup, do not hesitate to call Software Techniques' Customer Support at (540) 721-1002.

System Requirements

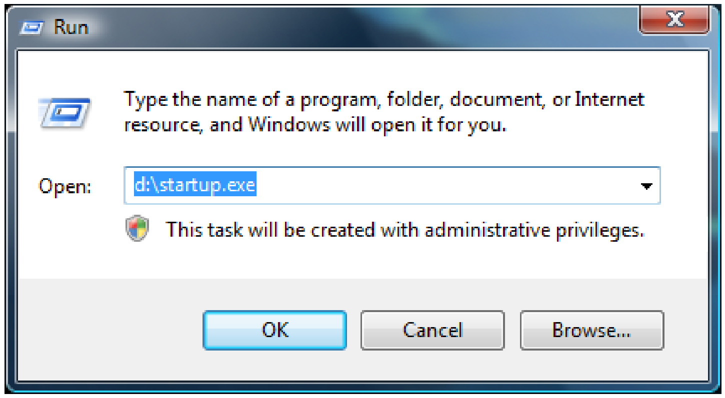
With your purchase of *HR*, your license defines a maximum number of employees. Minimum system requirements are fine if you have 100 or fewer employees. As the number of users and/or employees grow, processing speed slows and you may wish to increase processor speed and/or memory size to recommended levels.

Resource	Minimum	Recommended
Hard Drive (local and network)	500 Megabytes (MB)	2 Gigabytes (GB)
RAM	1 GB	2 GB or Higher
Operating System	Windows XP	Windows XP / 7
Database Server	MS SQL Server 2005	MS SQL Server 2008 R2

HR Installation Procedure

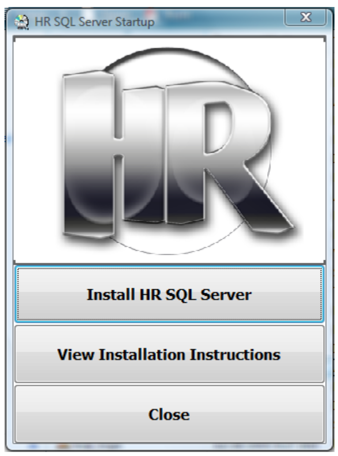
1. Make sure that your system meets or exceeds the minimum *HR* **System Requirements**
2. Insert the *HR* CD into the CD-ROM drive
3. If your system has the **Auto Run** feature set on, skip to Step 6. Otherwise, Click the Microsoft Windows® icon

4. Click **Run** and the following screen will appear



Run Startup

5. In the **Run** dialog **Command Line** box, type **d:\startup.exe** and click **OK**. If your CD-ROM has a different letter than "d", substitute that letter for "d". For example, **e:\startup.exe**. The following screen will appear.

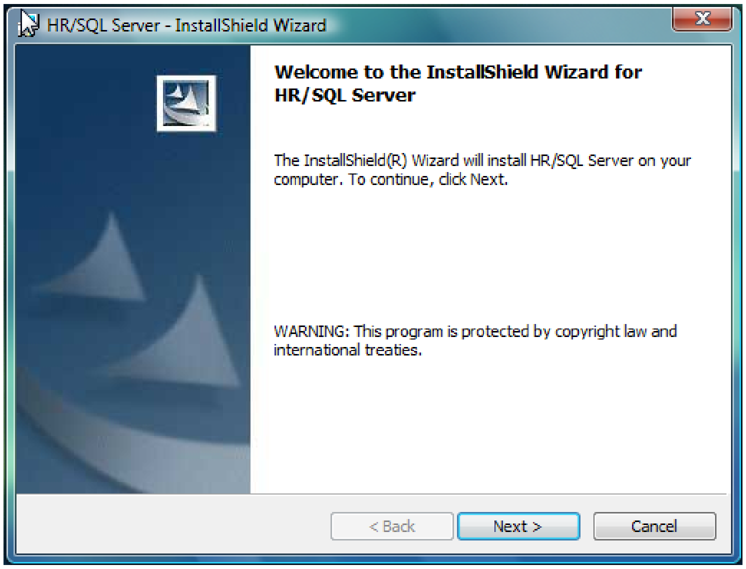


Startup for HR SQL Server Edition

Startup for HR Diamond Edition

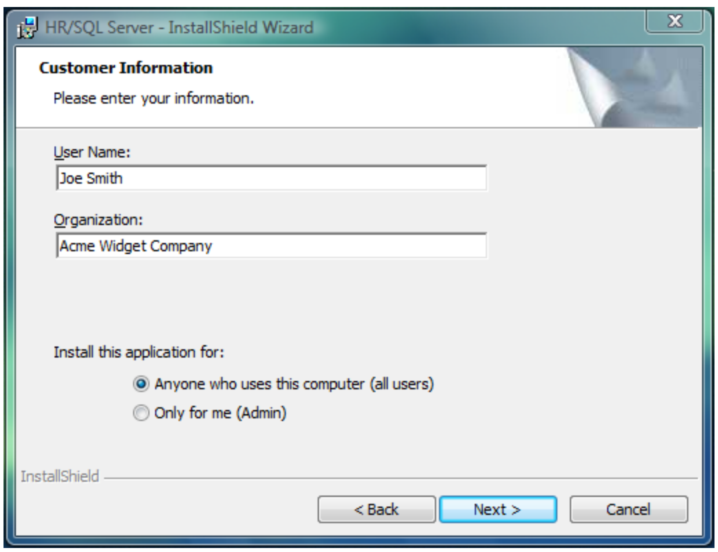
6. You may now install *HR*. Click **Install HR SQL Server or HR Diamond**.

At this point, the following screen will appear.



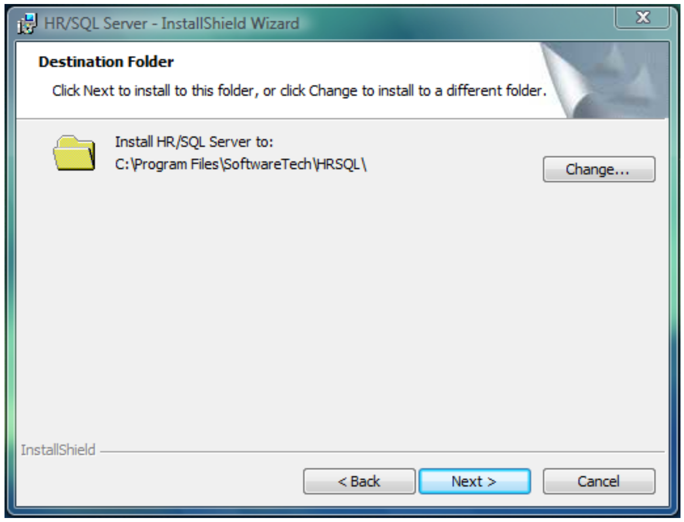
Install Shield - step 1

7. Click **Next** to continue. The following screen will appear.



Install Shield - step 2

8. Enter Customer Information. Click **Next** to continue and the following screen will appear.

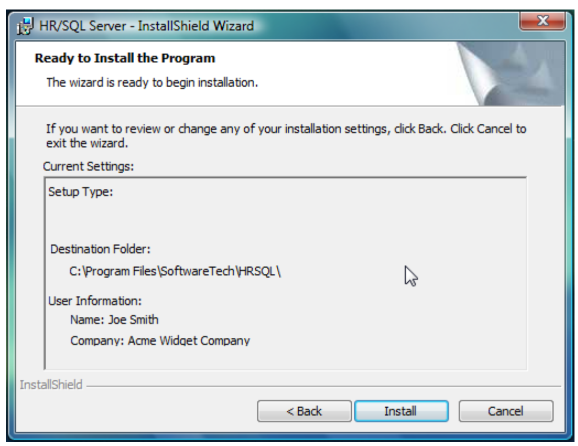


Install Shield - step 3

The above screen will allow you to change the destination folder. The **Destination Folder** is the folder where the ***HR*** software will be installed. Installing to the default folder is recommended.

Note - The Destination Folder is where the software program is loaded. This may be different than your **Common Directory** (discussed later in the **Startup** section of this chapter). Also, the installation directory is not necessarily located on the same disk or computer where your SQL Data is located. The software works best when installed directly on the client, to take full advantage of the nature of C/S architecture.

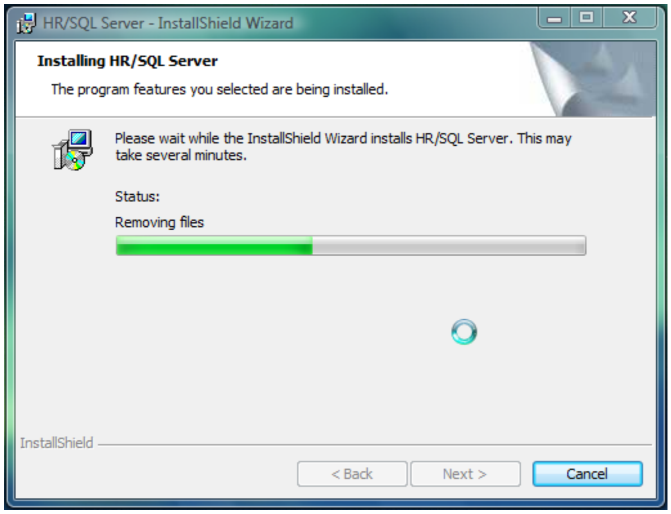
9. After selecting an installation directory, click **Next** to continue the installation. The following screen will appear.



Install Shield - step 4

If you have made a mistake, you may go back and correct it at this time.

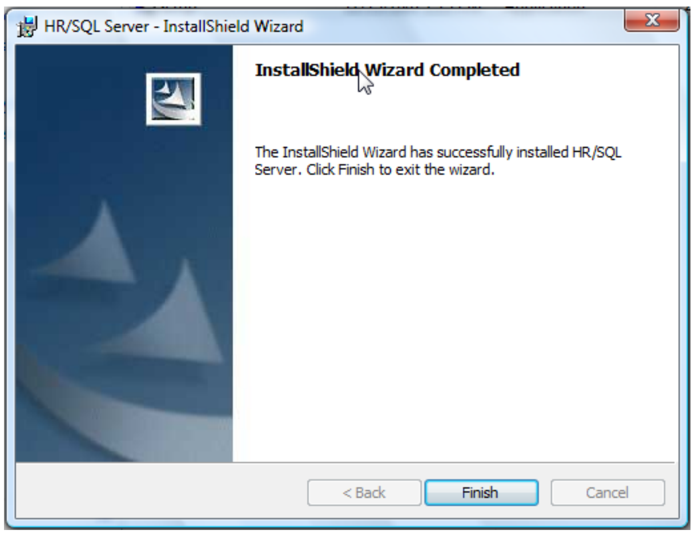
10. If you agree with the information stated, click **Install** to continue. The following screen will appear.



Install Shield - install in progress

Install Shield will keep you abreast of its progress.

When the installation has been completed, the following screen will appear.



Install Shield - install complete

11. The installation is now complete. Click **Finish** and you will be returned to the following screen.

Startup for HR SQL Server Edition

12. You are now ready to run ***HR*** and setup your database connection.

13. Click **Close** to continue.

Database Connection and Setup – SQL Version

Only use this section if you are using the HR SQL Server Edition. If you are using HR Diamond Edition, check out the next section, Database Connection and Setup – Diamond Version.

1. Before you will be able to continue you will need to make sure that you work with your DBA to create an empty SQL database. Make sure that the database is large enough to support all your data. Also make sure your DBA has given you a SQL account with the necessary security to create all the tables that ***HR SQL*** will create.

   Write down the SQL Server Name for reference ________________________________

   Write down the SQL Database Name for reference ______________________________

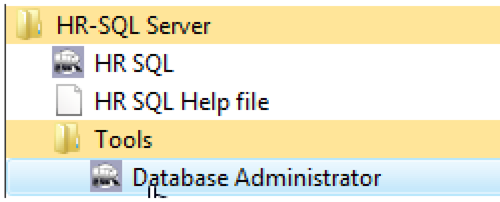
   Write down or memorize your SQL account User Name __________________________

   Also memorize your SQL account password

2. Next, work with your DBA to make sure you have a SQL connection from your client workstation. The next few steps will help you complete the connection process. However, you will not be successful unless you have the SQL client tools installed and you can connect to your SQL server via your network. In other words, it will be probably be best if your DBA assists you in the next few steps.

   Most SQL environments will require the SQL DBA to perform some of the database installation steps.

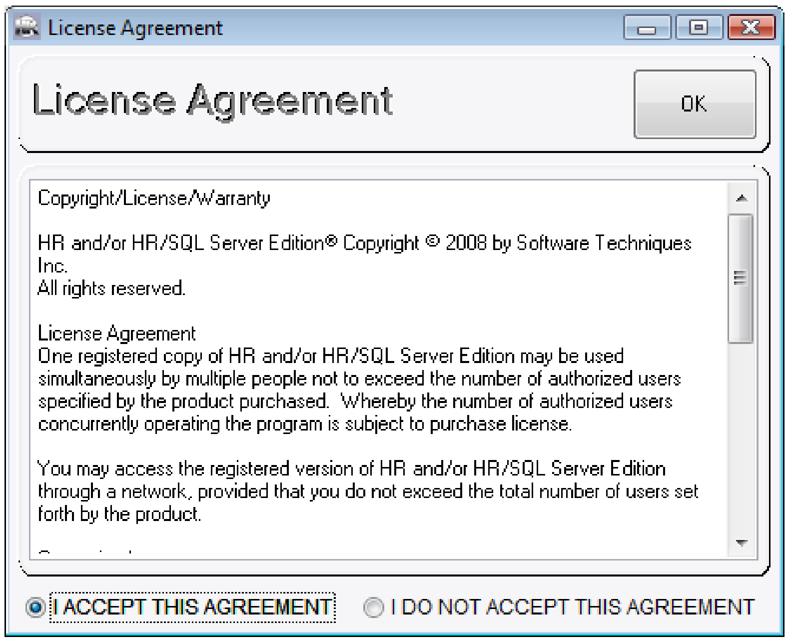
   Use the **Database Administrator** Tool for ***HR SQL*** to establish the SQL database connection and setup the database tables. From the Windows start menu:



Selecting DB Admin mode from the Windows Start Menu

3. After starting ***HR*** SQL, you will be asked to review the license agreement.

   Be sure to read through the entire License Agreement:



License Agreement

If you agree with the terms of the license agreement, click 

.

If you do not agree, click 

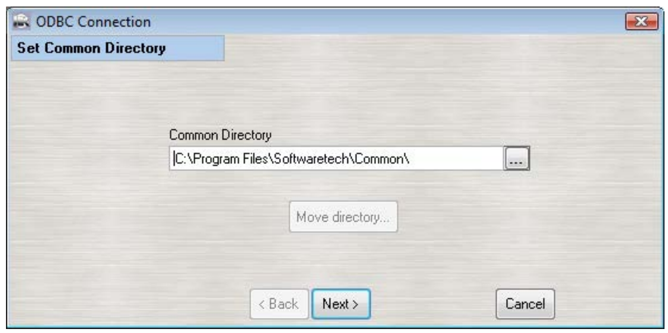
. Click **OK** to continue.

4. If you clicked "**I Accept**" after installing ***HR SQL***, the following login screen will appear.

DB Administrator Login

At this juncture you will be unable to login. The first thing you will need to do is configure your Common Directory and setup your ODBC Connection. To do this click **Configure**. If the button says "Change" rather than "**Configure"** then you are in the wrong place. You need to be running the DB Admin Tool first before running the main application.

5. The first thing you will need to do is establish a common directory. ***HR SQL*** needs a common area to store common files that can be accessed by all users. It is usually best to store this on a networked file server that is on the same network as your SQL database server.

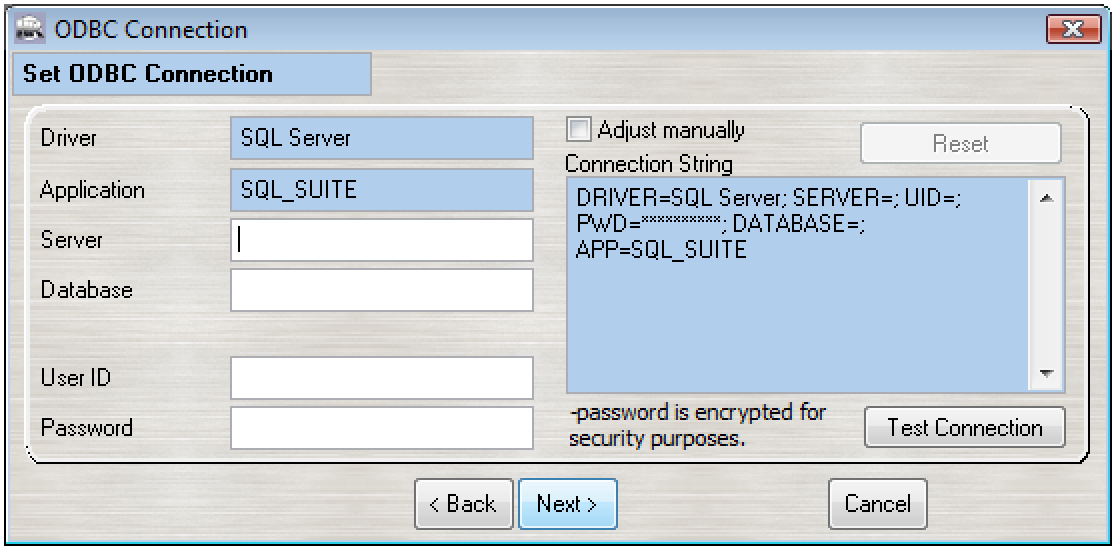


New Common Data

Note to the Network Administrator - The common directory serves as a central gateway for the application. It contains graphical images, user defined absence icons, encrypted email configuration files, and encrypted ODBC connection strings, and report templates as well as other common components shared by all users. It is important for consistency that all users, who are accessing the same database, share the same Common Directory.

Select a common directory on a shared network drive or shared network resource, such as “T:\HRSQL Data\Common”.

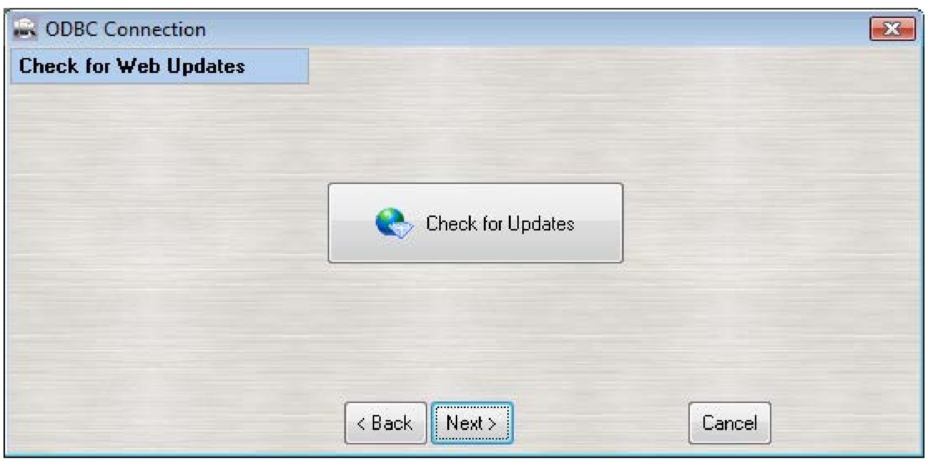
6. The next step is to connect to the SQL Server and create an ODBC connection.



Establish an ODBC Connection string

Enter the name of the SQL Server and the SQL Database that you recorded earlier. You will need to supply a SQL server account id and password. If you are not sure contact your SQL DBA. You can test your connection by clicking **Test Connection**. Once you have made a successful connection, click **Next**.

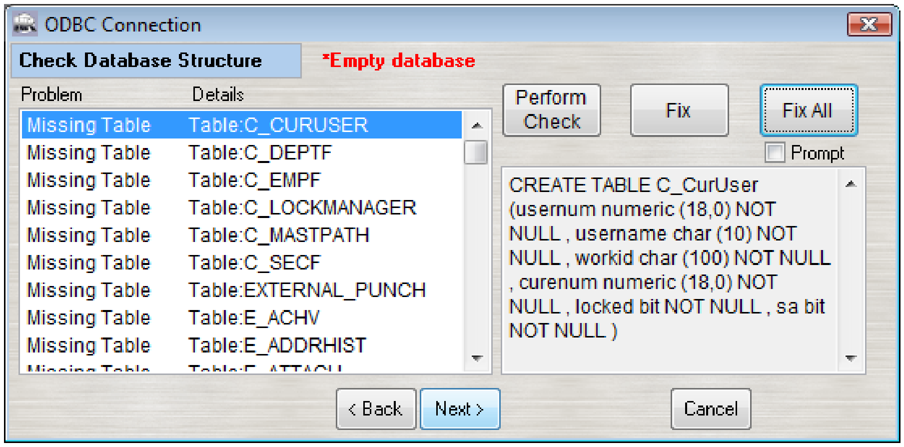
7. At this point you will have the option of Checking for Updates on the Web.



Check for Web updates

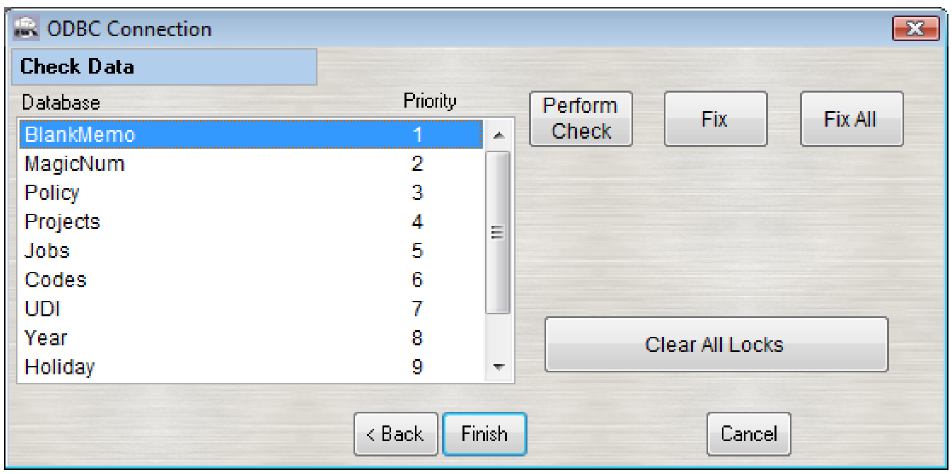
This step is not always necessary, but is probably a good idea. In some instances where there has been a change to the database structure, you may have to check for and download an update. If there are updates available, they will be downloaded to the common directory. Each workstation will update itself from the common directory. Click **Next** to move on to the next step.

8. After connecting to the SQL Database, ***HR SQL*** will automatically test the database for structural integrity. If you have just installed the application, the database should be empty.



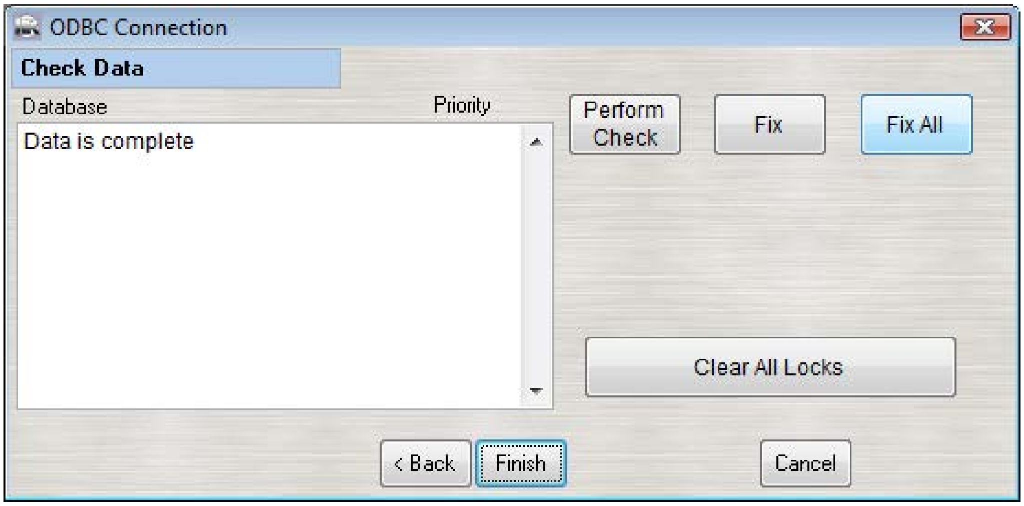
To create a new database or to repair an existing database with a broken database structure click **Fix All**. *HR SQL* will automatically construct all the missing database components. Once you have a working database structure, click **Next**.

9. The next step is to make sure that the data in the database is initialized for use. At this juncture the data should be empty and will need to be created just like the database structure was created.



HR can easily create an empty database for you.

To start from scratch with a blank database you can click **Fix All**.



Database successfully created - DB Admin setup complete

Once the data is created the database administration setup is completed. Click **Finish** and you can return to the Database Administrator Logon screen.

Return to Database Administrator Login

With everything completely setup you will now be able to access ***HR*** from the icon on your desktop or from the Windows Start menu.

Database Connection and Setup – Diamond Version

Only use this section if you are using the HR Diamond Edition. If you are using HR SQL Server Edition, check out the previous section, Database Connection and Setup – SQL Version.

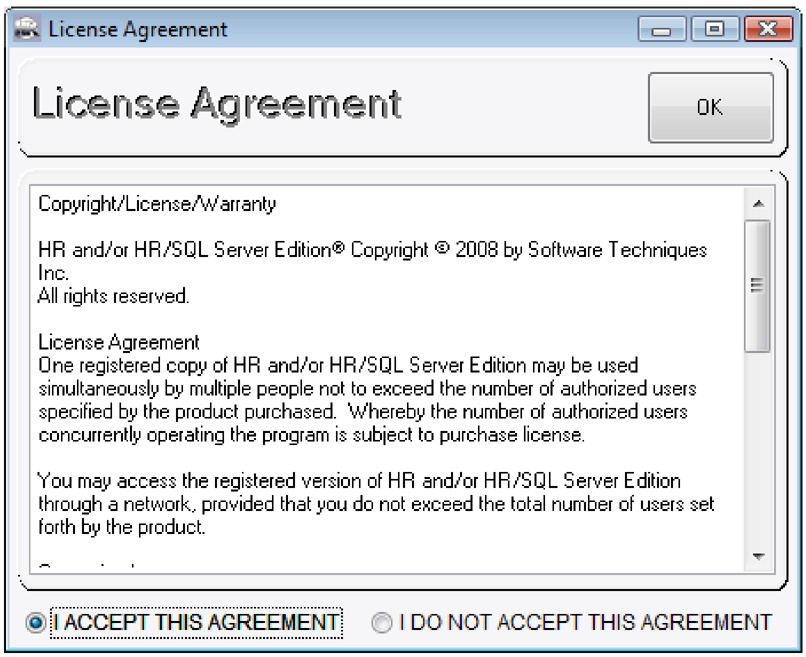
1. The next few steps will help you help you complete the connection process.

   Use the **Database Administrator** Tool for HR to establish the database connection and setup the database tables. From the Windows start menu, click **Tools-Database-Administrator**.

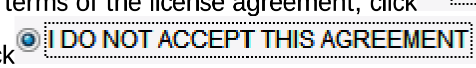
Selecting DB Admin mode from the Windows Start Menu

2. After starting HR, you will be asked to review the license agreement.

   Be sure to read through the entire License Agreement:

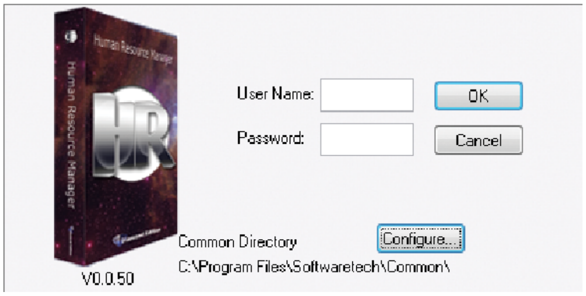


   If you agree with the terms of the license agreement, click 

. If you do not agree, click 

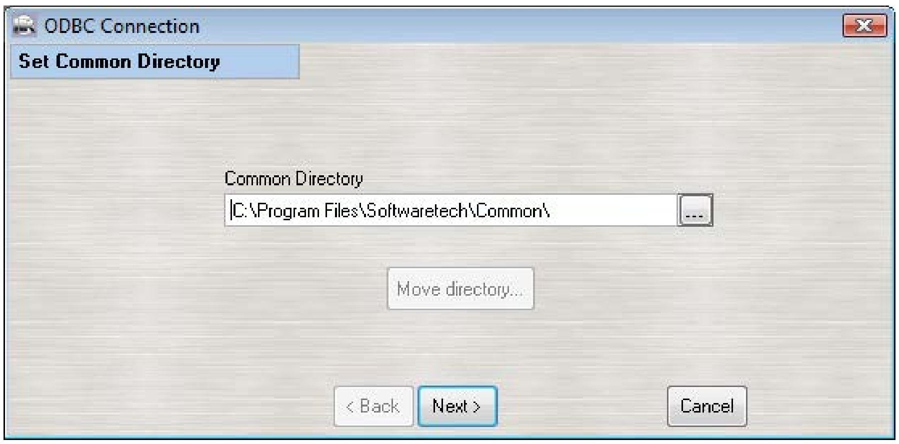
. Click OK to continue.

3. If you clicked I Accept after installing HR, the following login screen will appear.



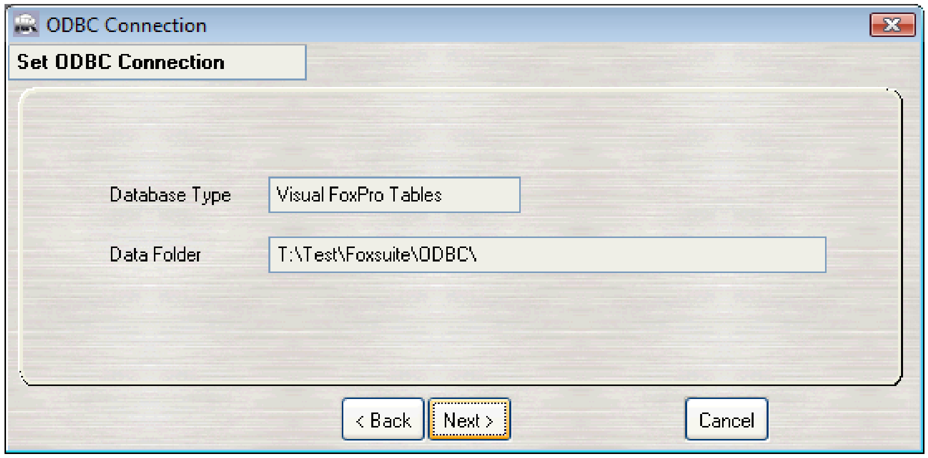
At this point you will be not be able to login. The first thing you will need to do is configure your Common Directory. To do this click on **Configure**. If the button says "Change" instead of "**Configure"** then you are in the wrong place. You need to be running the DB Admin Tool first before running the main application.

4. The first thing you will need to do is establish a common directory. HR needs a common area to store common files that can be accessed by all users. This common directory will also be where your main database is stored. It is usually best to store this on a networked file server.

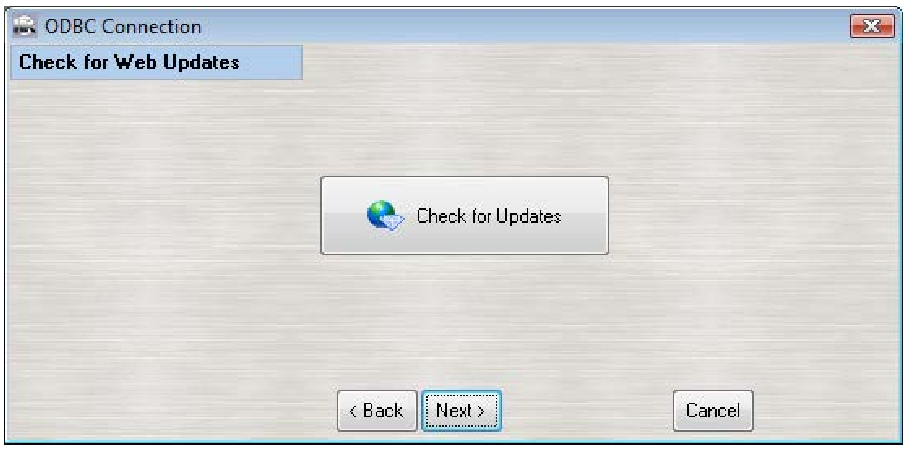


Note to the Network Administrator - The common directory serves as a central gateway for the application. It contains graphical images, user defined absence icons, encrypted email configuration files, encrypted ODBC connection strings, and report templates as well as other common components shared by all users. It is important for consistency that all users who are accessing the same database share the same Common Directory.

5. This step will show you where your database will be stored in relation to the common directory. It also shows the type of database used. Click **Next** to go to the next step.

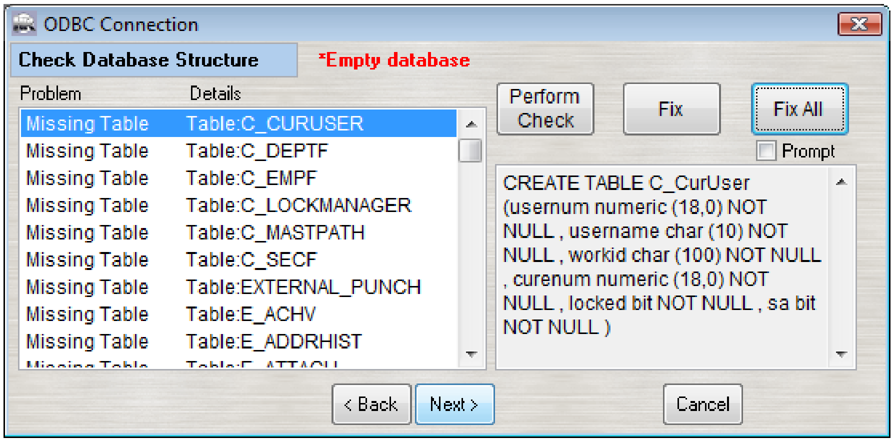


6. At this point you will have the option of checking for updates on the Web.



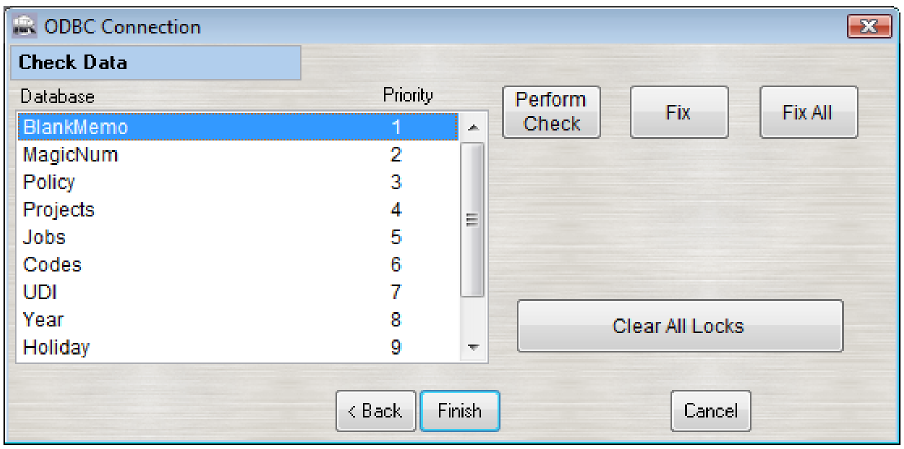
This step is not always necessary, but is probably a good idea. In some instances where there has been a change to the database structure, you may have to check for and download an update. If there are updates available, they will be downloaded to the common directory. Each workstation will update itself from the common directory. Click **Next** to move on to the next step.

7. After connecting to the database, HR will automatically test the database for structural integrity. If you have just installed the application, the database should be empty.

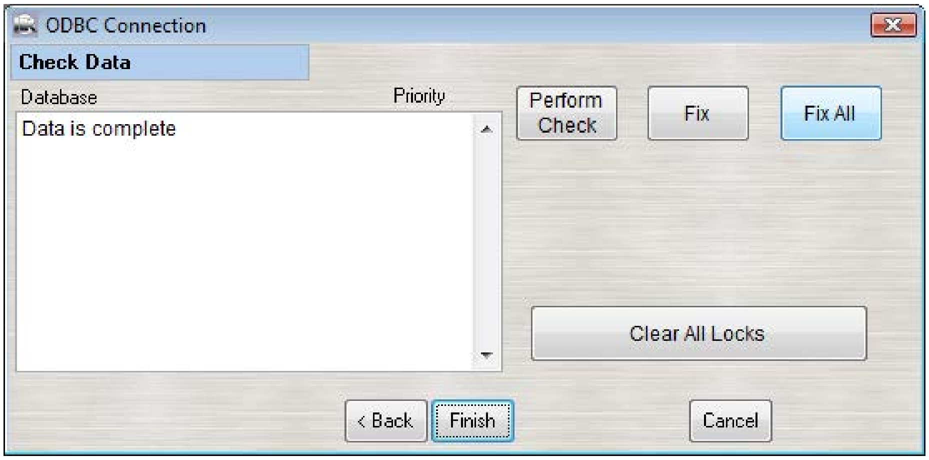


To create a new database or to repair an existing database with a broken database structure click on **Fix All**. HR will automatically construct all the missing database components. Once you have a working database structure, click on **Next**.

8. The next step is to make sure that the data in the database is initialized for use. At this juncture the data should be empty and will need to be created just like the database structure was created.



HR can easily create an empty database for you. To create a blank database you can click on **Fix All**.



Database successfully created - DB Admin setup complete

Once the data is created the database administration setup is completed. Click on **Finish** and you can return to the Database Administrator Login screen.

Return to Database Administrator Login

With everything completely setup you will now be able to access HR Diamond from the icon on your desktop or from the Windows Start menu.

License Activation

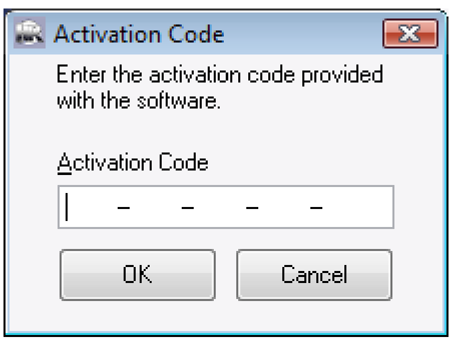
1. Now you should be ready to run ***HR*** for the first time.

SQL Edition and Diamond Edition icons are shown

First time application login

To enter ***HR*** for the first time, login in as Admin with no password. Once you get in you can change your User Name and Password.

2. Now you should be ready to activate your license.



Enter your activation code

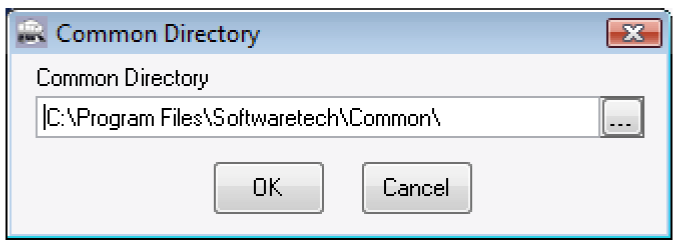
Your CD and CD case should contain an Activation Code. Simply enter the code and click **OK** and you are ready to use ***HR***. Once activated, your database will be locked into a maximum number of employees. If your company exceeds that number of employees, you can contact your sales representative to purchase a license extension. You will then receive a new activation code, which can be entered through the Upgrade License Utility.

Congratulations! You are now ready to begin using ***HR***.

Setting up additional workstations

After the first workstation, each additional workstation is much easier to set up. To set up additional workstations, you can enter the program normally (not in DB Admin mode). Once in the program, you will get to a similar login screen:

The Configure button has been replaced by the Change button. In this case, click the Change button. The following screen will come up:



Just change the Common Directory field to what you set up in the step above. Once you click **OK**, the workstation will inherit all the settings from the common directory. Just click **OK** on the Login Screen and you'll be in!

Chapter 3 Getting Started

Now that you have installed *HR*, you will want to configure the software to your specifications. There are 6 areas that you should configure to setup your environment and 1 that will help in review of your network:

- Super Administrator Options
- Workstation Options
- E-mail Configuration
- Startup Settings
- Evaluation Scoring
- User Codes
- Net Watch

Visit these sections in order for best results.

System Roles

In order to better understand which users have access to which options in *HR*, it is helpful to cover the following System Roles.

Employee

Employees have read-only access to their own information. They can view their own records.

Administrator

The Administrator role is allowed to view and modify a certain subset of employees. This can be for one or more departments. The Super Administrator sets their privileges.

The Administrator role does most of the data entry into the *HR* system. They can access and modify all employees in their purview, but can not alter any global configuration settings.

Super Administrator

The Super Administrator has all privileges in the *HR* system. They can do everything an Administrator can do as well as setting global configuration parameters and assigning Administrator roles and privileges. The Super Administrator can also give users Super Administrator options.

Super Administrators have access to all employees, all the time. They also have access to all sections of the application. Super Administrators can log in as regular administrators if they want. If you log on as a Super Administrator, the database will be locked and you will be the only one allowed to use *HR* at that time.

Database Administrator

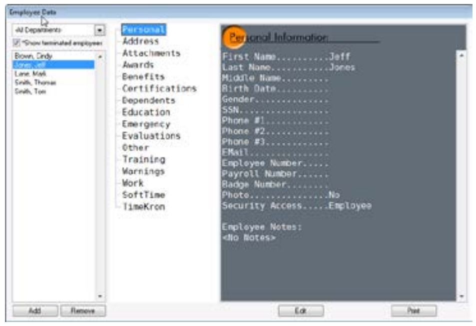
The Database Administrator is a special role that works outside of the ***HR*** application. This person is responsible for making sure that your Database is functioning properly. This includes creating the SQL Database, making sure the SQL Server is operating smoothly, making sure the ***HR*** Database is secured and accessible by all those that need access, and finally making sure it is backed up on a routine schedule.

Feature (see menu)	Employee	Admin	SA (shared)	SA (users locked out)
Export		X	X	X
Import				X
Startup Settings				X
Departments				X
Email Configuration			X	X
Upgrade License				X
Web Update				X
Email Notification		X	X	X
Employee Reports	X	X	X	X
All Other Reports		X	X	X

Security feature grid (X = access allowed)

Getting Around

HR is a standard Microsoft Windows® application. You should be familiar with concepts such as menus, clicking, double-clicking, drag & drop and therefore have no problem learning your way around.



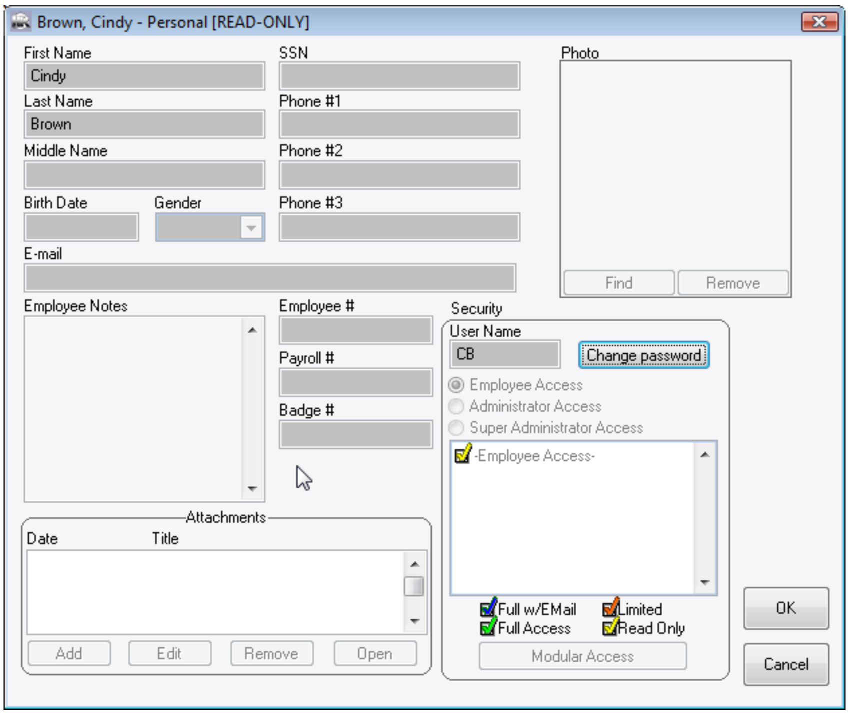
The default screen of ***HR*** shows a list of Employees, Employee Categories and Employee Personal Information. Each of these categories has their own section in Chapter 5 – Employee Information. There is also a Department drop-down list box so you can filter your list of employees by department.

Depending on your role in ***HR***, you will have access to some of the features. The others will be disabled.

HR operates by interfacing with the ***HR SQL*** Database. This is handled internally by the application as it communicates with the SQL Server. The SQL Server can maintain several databases. To make sure you are accessing the correct database you can always look at the application title bar. It should include the name of the database in square brackets (e.g. [hrsql]). If the correct database does not appear in the title bar, exit the application and contact your Database Administrator.

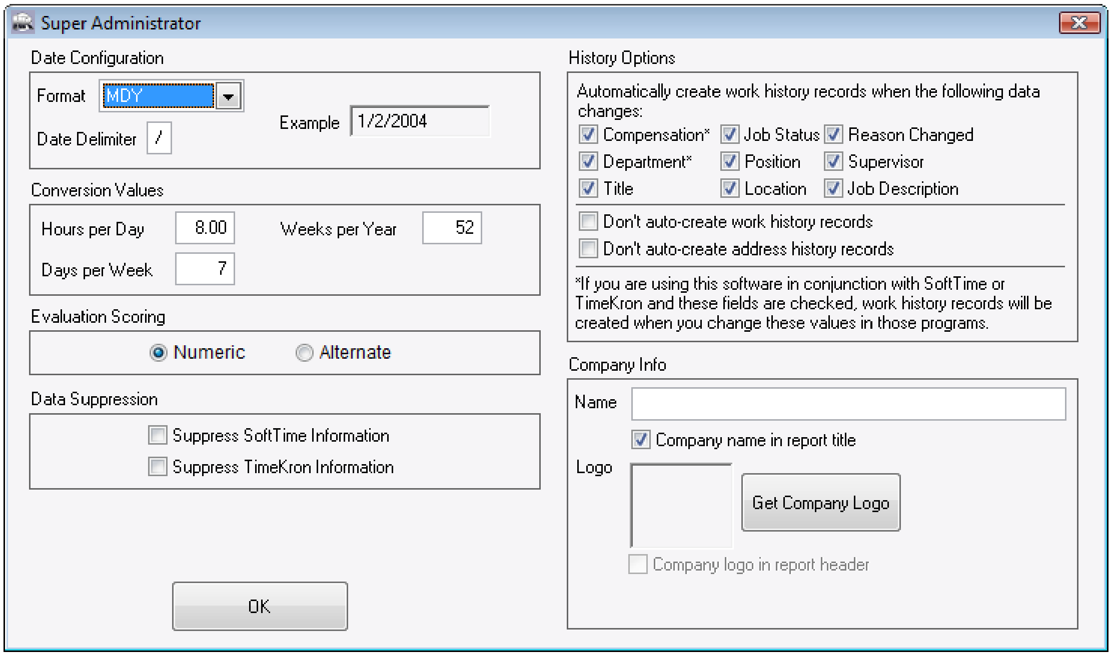
Read Only Access and Record Locks

As you select an employee, ***HR SQL*** will communicate with the SQL Server to get the records for that employee. The first user to access a set of records will place a lock on the records for that employee. When the second user attempts to access the same record(s) at the same time he will only be able to access the record(s) in Read-only mode. This will prevent two users from changing the same record(s) at the same time. When a record is accessed in Read-only mode the screen title will display "[READ ONLY]" next to the employee name and the screen will be a darker shade of grey.



Super Administrator Options

To enter this mode, click **Settings->Super Administrator** options. This screen allows the Super Administrator to configure global settings that will apply across ***HR***.



Date Configuration

This allows you to choose how you want the date to be displayed. You can choose from the options in the drop down window.

Conversion Values

This allows you to set how many hours per day, days per week, and weeks per year for your organization.

Evaluation Scoring

This allows you to set how the rating for employee evaluations will be displayed. This will be defined later in this chapter.

Data Suppression

If you are a user of Software Techniques' SoftTime or TimeKron, you will be able to display current information about the employee in ***HR***. ***HR*** will automatically enable data sharing between the programs. If you want to suppress these features, click the suppress SoftTime and TimeKron information boxes. For more information on integrating TimeKron, punch clocks, and other biometric devices and SoftTIME Diamond SQL Server Edition, with ***HR*** contact our sales department at (540) 721-1000.

History Options

HR can automatically create work history for each employee. There are nine different fields that can affect work history. If you want to automatically create a work history record, when any of those fields change, just check the appropriate box. If you do not want to do this, click **Don't auto-create work history records**. Additionally, *HR* can auto-create address history records. Any time you change a field on an employee's current address, an address history record (with the old address) is recorded. If you don't want to track address history in this way, click **Don't auto-create address history records**.

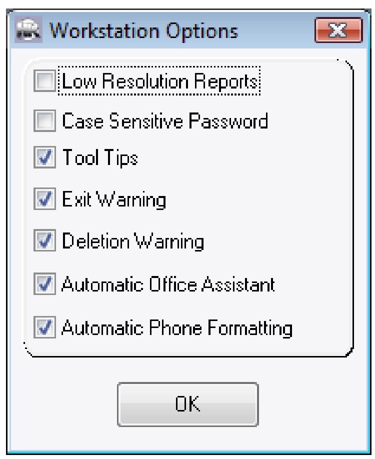
Company Info

This information allows you to customize reports and printouts with your company name and logo. The name entered here will appear wherever a report or screen displays the company name.

Pressing the **Get Company Logo** button will present you with a file picker dialog to choose an image file for your company logo. Reports allow you to select a checkbox to display this logo on printouts.

Workstation Options

To enter this mode, click **Settings->Workstation Options**. These options apply only for the specific workstation on which *HR* is running. They govern certain settings that apply to the user's session and display preferences.



Low Resolution Printer

This option allows you to specify that you have a lower resolution printer. The report generator will forgo the fancier shading it uses when generating reports.

Case Sensitive Password

This applies to the passwords for THIS WORKSTATION ONLY. If it is set then anyone logging into this machine will be required to enter a case sensitive password.

Tool Tips

This option will present you with a tool tip on the cursor wherever one is available in ***HR***. This can be helpful when you are first learning the software and can be turned off after you are familiar with the program.

Exit Warning

This option will alert you any time ***HR*** is closing to make sure you actually wish to end your session.

Deletion Warning

This option will confirm deletion any time you attempt to delete anything in ***HR***.

Automatic Office Assistant

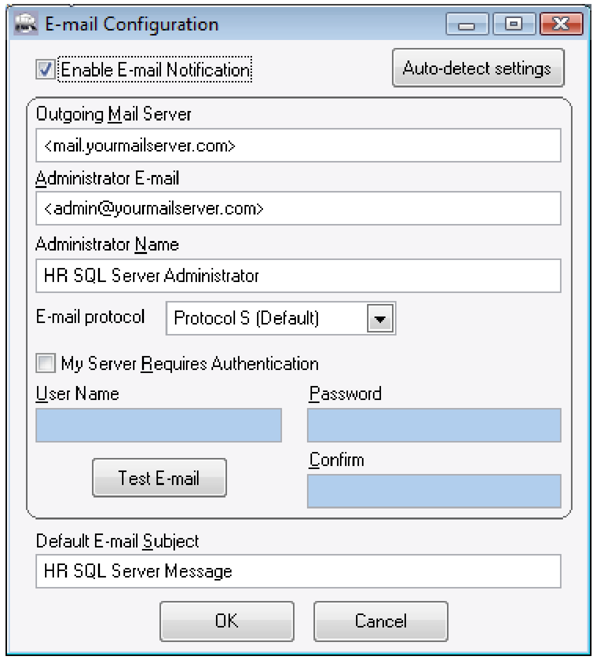
This option will automatically perform Office Assistant checks on startup as directed in the Office Assistant form.

Automatic Phone Formatting

This option will automatically format the phone number. (e.g. (XXX) XXX-XXXX).

E-mail Configuration

To enter this mode, click **Settings->E-mail Configuration**. These settings are available to the Super Administrator ONLY. They basically configure ***HR*** to generate email via your existing e-mail server.



Enable E-mail Notification

This is the first step to setting up your e-mail configuration. When this box is checked all of the other settings become enabled. Without e-mail notification enabled ***HR*** will not attempt to generate e-mails.

Auto-detect Settings Button

This handy button will go out onto the Super Administrator's computer and detect the server and account that is set up in the default mail client. It will present you with a confirmation dialog showing what it was able to detect. This tool may not work for all computers, but it's a good place to start.

Auto-detect Settings

You can either accept the detected settings by clicking **OK** or ignore them by clicking **Cancel**.

Outgoing Mail Server

This is the SMTP server name that handles your outgoing mail. It can be found in the configuration settings of your mail program. It is usually in the form "mail.yourcompany.com" or "smtp.yourcompany.com".

Administrator E-mail

This is the e-mail address ***HR*** will use to generate e-mails. It must be a valid account on the specified mail server above. This is also the account that will be notified if there is a problem sending e-mails.

Administrator Name

This is the name associated with the e-mail account above. It will be filled in by the Auto-Detect or you can change it so the generated emails appear as if they come from a certain person in your organization.

E-Mail Protocol

Most ***HR*** users should be able to use their e-mail server with the default protocol. This is an internal ***HR*** protocol known as “Protocol S”. In some rare instances, you may experience problems with your e-mail server settings. In these situations a certified Technical Support Engineer may suggest that you try using the alternate protocol “Protocol W”.

My Server Requires Authentication

With security as a concern these days, most mail servers require authentication. However, since this will be internal mail to employees, your mail server may not require it. If you use Auto-Detect, it will be able to figure out your server’s policy. If authentication IS required, you must fill in the User Name and Password fields below.

User Name

This is your E-Mail User Name, not to be confused with you ***HR*** login. In some cases it is your full email address. Auto-Detect will be able to figure out if your server requires the full address or just your information before the “@” sign.

Password / Confirm

This is your E-MAIL password. You must enter it here twice. Auto-Detect Will NOT fill in your password.

Test E-mail

Once all the information has been entered, you can test to see if the information will work. Click the **Test E-mail** button in the upper right corner. If the E-mail was sent successfully you will be notified. Otherwise, it will tell you why the e-mail did not send. If the E-mail did send, go to your E-mail program and receive mail from the Administrator E-mail account. If you receive the email, you are all set.

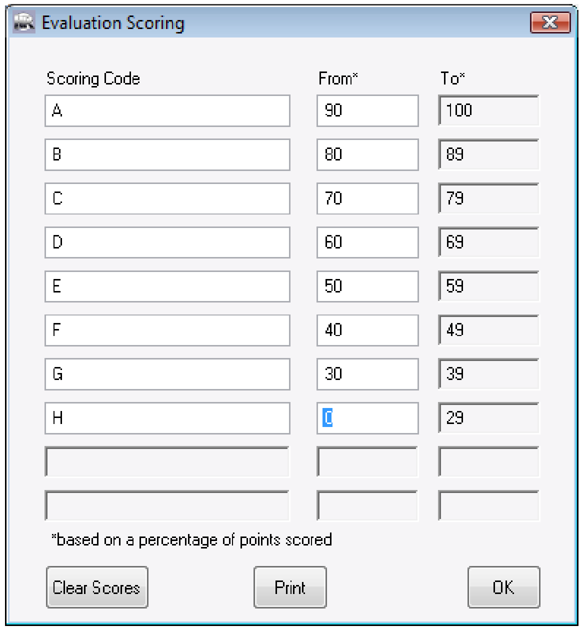
Default E-mail Subject

This is the text that will appear as the default subject for generated e-mail. You can override this subject on the e-mail notification screen.

Evaluation Scoring

To enter this mode, click Settings->Evaluation Scoring.

This screen lets you set ranges for ***HR*** to express evaluation scores. Scoring Codes are based on the percentage of points earned, not the point total. For example, using the values in Figure 3-5, ***HR*** would convert a score of 97 out of a possible 100 to A (97%). The first or best score will always end with 100 and the last or worst score will always begin with a 0 or 1. You can define up to 10 scoring codes for your company. When you add or change a score's from value, ***HR*** will automatically adjust the scores to the value.

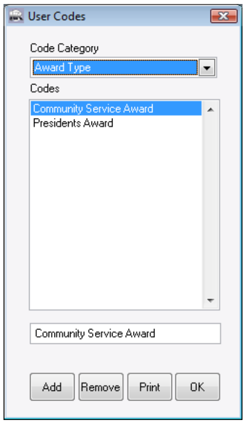


To add a new value, simply click the last record and change the From score to a value greater than 0. A new rating will appear with the name **"**-New Scoring Code-**".** To change the name of the new score, click the box containing "_New Scoring Code-" and enter the new name. To remove a scoring code, change the **From** value of the preceding scoring code to match that of the code you want to remove. ***HR*** will merge the two codes, keeping the name of the higher scoring code. (i.e. To eliminate the "H" category, change the value of G from 30 to 0.) If you wish to remove all of the scoring codes, click the **Clear Scores** Button.

Evaluation Scoring's default is Numeric. If you choose an Alternate scoring code, it can be changed in the Super Administrator options located on the Settings taskbar.

User Codes

To enter this mode, click **Settings->User Codes**. User codes allow you to create or modify items of various user code categories.

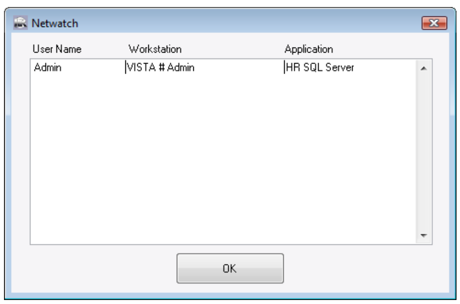


To change the User Code Category, click the Code Category drop down box. This will list all of the categories available for modification. Select the category you want to adjust. A list of available items for that category will appear. You can add, delete, or modify most of these items. A few items are fixed and can not be modified or removed. To modify an item, select it and edit the name in the text box. You can not remove an item if it is in use.

NOTE: Changing a title is a System Wide modification. When you modify an existing title, that title will be changed throughout ***HR***, including each employee file.

Netwatch

To enter this mode, click **Settings->Netwatch**. This screen shows all users currently logged in to the system, their workstation ID, and the application. Clicking on the refresh button will update the screen and show any changes since you last opened the screen.



Chapter 4 Organization Information

Defining the organization is the first task that must be completed after the software installation and before you can enter any employee information into the system. In this chapter, we will explore what is needed to get started.

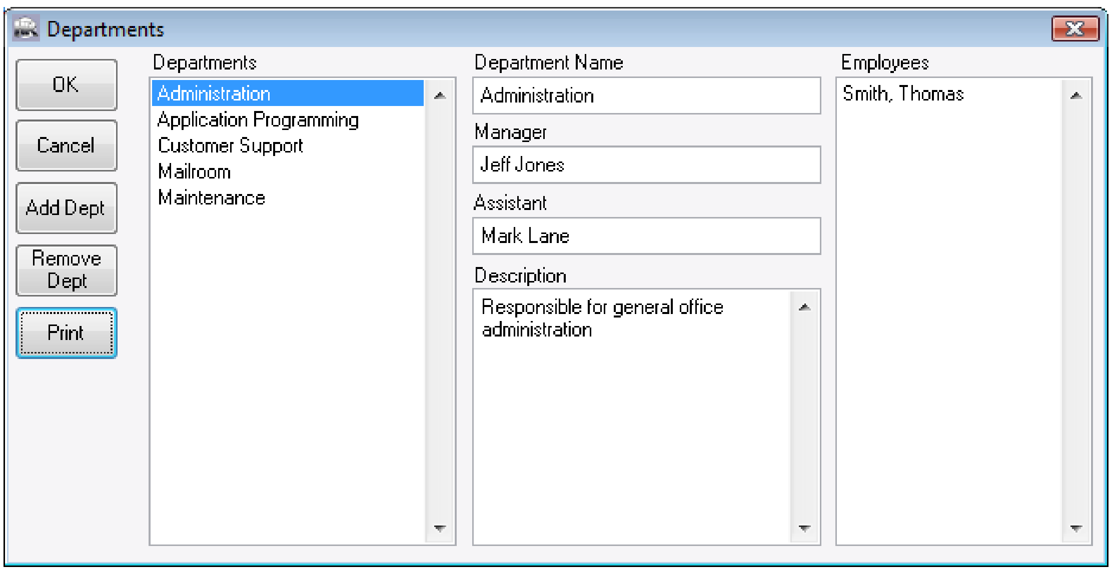
Departments

Entering Department information is the first item you need to complete. This information defines your organization, and affects all employees and reporting; any changes you make in this category changes the entire organization. Click **Organization**. This section is broken down into Departments, Positions, Company Benefits, Evaluations, and Attachments.

Before employees can be added to ***HR***, it is recommended that you set up your departments and positions.

Adding Departments

Click **Organization** -> **Departments** and select the **Add Dept** button. A new screen will appear with the department area blank. The only mandatory information on the screen is the department name. Click **Add Dept** to enter additional departments. You can also add a manager, assistant, and department description by clicking inside the Description field box and typing the information. After you have completed adding all the departments, click the **OK** button.



Note - If you modify the department name, any employees assigned to that department will also have their department name changed.

Removing a Department

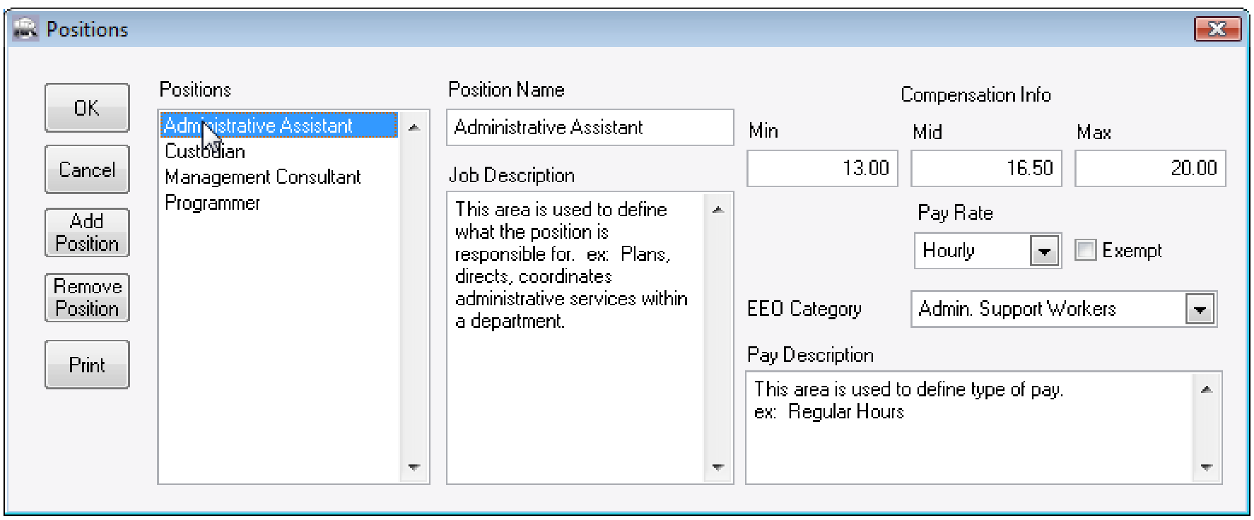
Click **Organization -> Departments**. Find and select the department you want to remove and, click the **Remove Dept** button. You can only remove a department if the headcount is zero (0).

Positions

Entering **Positions** is the second item you need to do before you can add employees. This information defines your positions, the minimum, mid-point and maximum compensation, Pay Rate, Exempt and EEO Category.

Adding Positions

Click **Organization -> Positions** and click the **Add Position** button. The Position Name field will be highlighted with New Position. In the Position Name enter the position; press the **[tab key]** to take you to the next field. This will select the Job Description field. The job description field is not a mandatory field but is helpful when writing up job descriptions for advertising. Enter the Job Description and press the **[tab key]** to take you to the Min field. Type the compensation information in each field. These values serve only as guidelines. An employee's salary can go below the minimum or above the maximum. Tab to the Pay Rate field, from the drop down menu, pick the type of Pay Rate, Hourly, Daily, Weekly, Bi Weekly, Monthly or Annually. If the position is an Exempt position, click Exempt. From the drop down menu, select the appropriate EEO Category. Now tab to the Pay Description field and enter how often this position is paid or other information about the Pay. To add more Positions click **Add Position** and repeat the process, when finished click **OK**.



Removing a Position

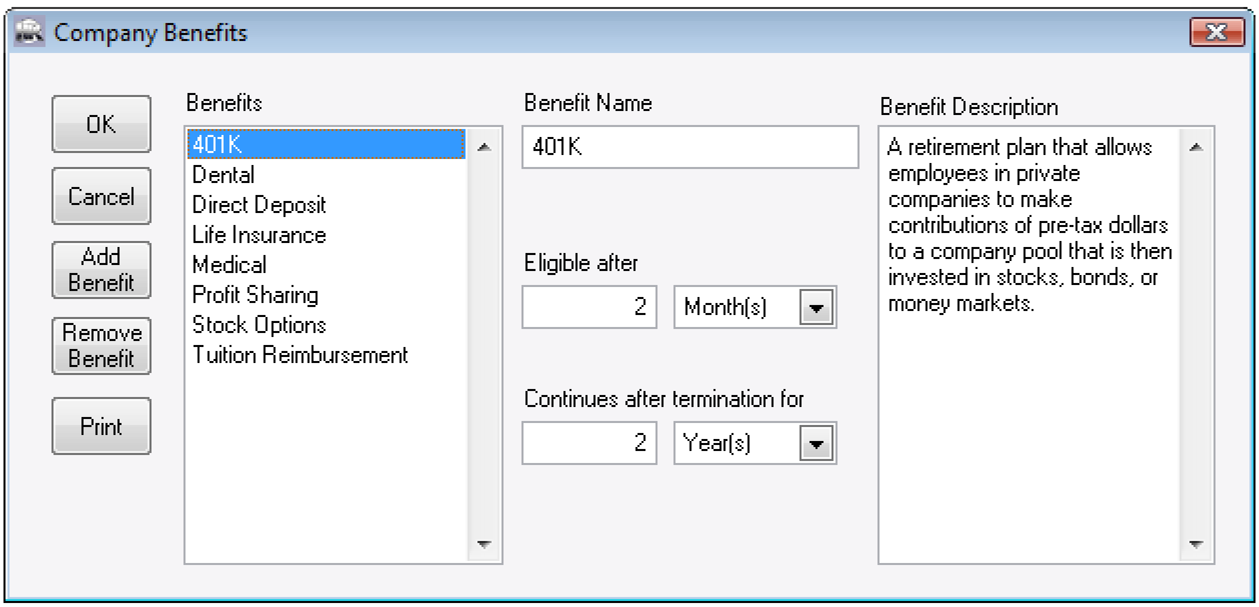
Click **Organization** ->**Positions**. Find and select the position you want to remove and click the **Remove** button. You can only remove a position if the position is not being referenced in an employee record.

Company Benefits

Entering **Company Benefits** must be done before you can add them to employee files. In each benefit record you can determine when employees will become eligible for the benefit and how long after an employee terminates the benefit is available to them.

Adding Company Benefits

Click **Organization** ->**Company Benefits**. Click **Add Benefit** and the field will be highlighted with New Benefit. In the Benefit Name field, enter the benefit, press the **[tab key]** to take you to the **Eligible After** field. Enter when this benefit is available to the employee. For example: 401K coverage - if this benefit is available after 6 months and continues for 0 months after termination enter the following: In the **Eligible After** field you would enter 6, **[tab]** to the next field and select months from the drop down menu or type "**m**" for months. **[tab]** to the **Continues after termination for** field and enter 0, **[tab]** to the next field and select months from the drop down menu or type "**m**" for months. Now **[tab]** to the **Benefit Description** area and enter information that describes the Benefit. The Benefits Description field is not a mandatory field.



Note - ***HR*** benefits do not make a distinction between full and part time employees**.** Eligibility is based on the employee hire date.

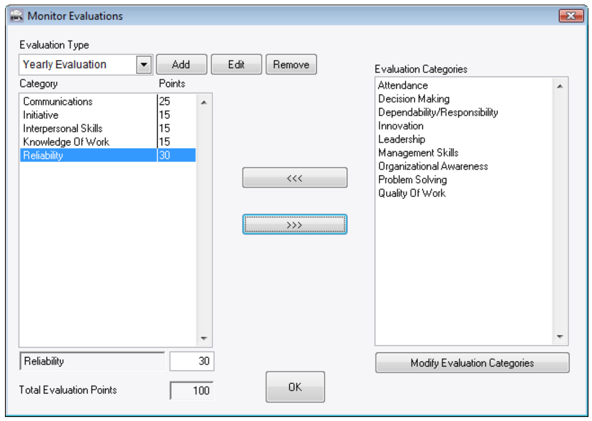
Evaluations

Entering Evaluations must be done before you can enter an employee evaluation.

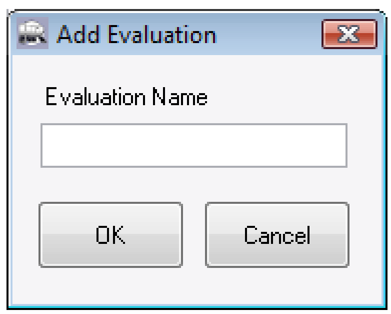
Adding Evaluation Types and Categories

Click **Organization** -> **Evaluations**. The Monitor Evaluations screen is separated into two sections. Evaluation Type and Evaluation Categories.

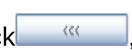
To create a new Evaluation Type, click **Add.** The Add Evaluation screen will appear (figure 4-4). Type the name of the evaluation in the text box and click **OK**.



Add Evaluation Screen

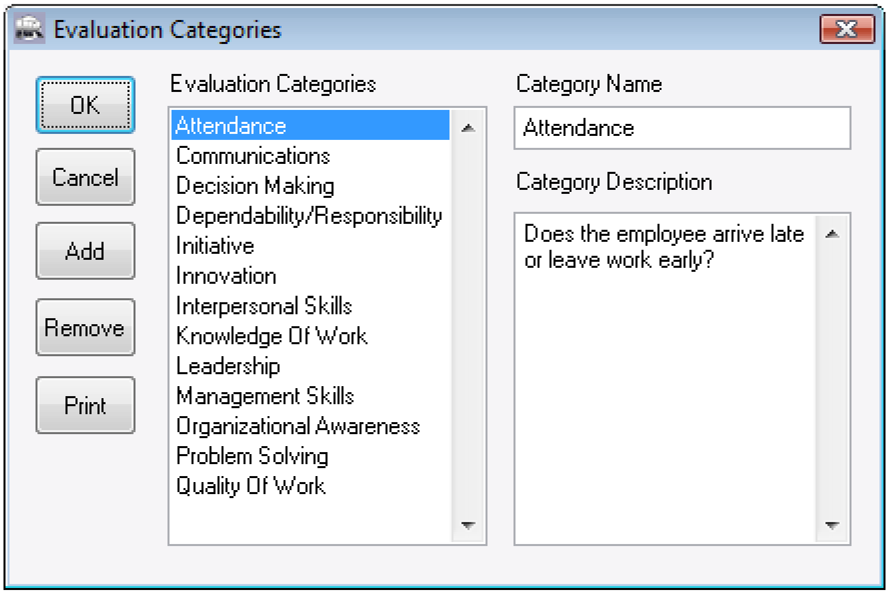


To make a change to the evaluation name, click the **Edit** button on the Monitor Evaluations screen (figure 4-4).

To add evaluation categories to an evaluation type, select the descriptor and click , when completed selecting descriptors, click **OK**. For each category that you add to an evaluation, you can adjust the point total for each category. To do this, click the category in the list on the left. Underneath the list, the category will appear. Then just click the field next to it and enter a value for that category. Keep in mind that categories can have different values in different evaluations. Once you've entered a value for the category, you'll see it appear to the right of the category in the list on the left.

To add Evaluation Categories, click **Modify Evaluation Categories** and then click **Add.**

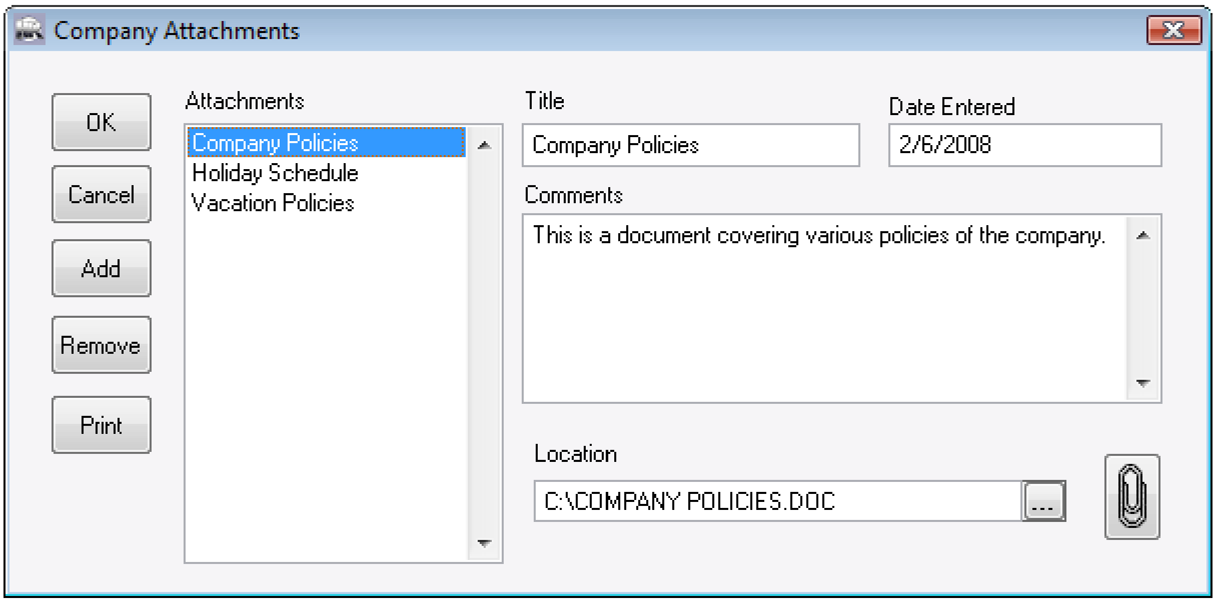
In the Category Name field, type your evaluation category. Continue to click **Add** until you have all the category names added. When finished click **OK**. To remove an Evaluation Category, select the Category, click **Remove**.



Note: If you try to remove a category name and it is in use, you must remove all references to the category, before it can be deleted.

Attachments

Attachments are important documents you would like to store and refer to for future reference. They can be word processing documents, excel spreadsheets, photos, audio or video files, and other graphic images etc. To add an attachment, click **Organization->Attachments** and enter the required information for the attachment and select the . Locate the document and click **Save**. ***HR*** saves the location of the document. To access the document, select the document from the white box and double click. The attachment or document will be retrieved by the program that was used to create the attachment.



It should be noted that ***HR*** will allow multiple attachments for each category for each employee. This is a powerful feature. To read more on this feature, see Chapter 5 - Employee Information.

Note: ***HR*** will not move each attachment you enter to the Common Directory. It will simply save the location that you specified. The reason for this is that if changes are made to any file that ***HR*** links to, we didn't want the user to have to make changes twice (once for the original, once for the copied version). Because of this, it is important to note where each file is. If you specify a file on your local hard drive, users on other workstations will not be able to access the attachment. Keep this in mind when specifying attachments.

Chapter 5 Employee Information

Employee Data

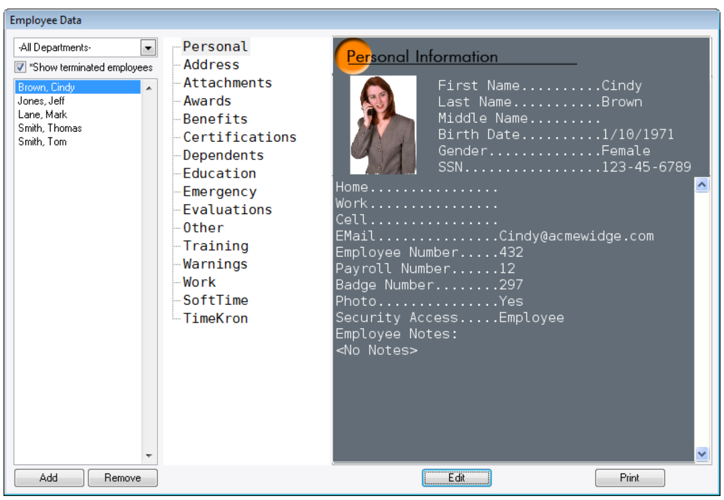
The Employee Data screen allows you to Add, Edit and Remove employees from the system and allows access to all employee information categories. Each category is explained later in the chapter.

To review employee data by department, click the department box in the top left corner of the screen. Choose the department you want to view. All employees in the selected department will appear in the employee list box (Figure 5-1) directly underneath the department box. (Selecting All Departments will show all employees in all departments.) To select an employee, click the employee name in the employee list box. Once you have selected an employee, you can choose one of the categories on the right side of the employee name box. Depending on the information to be viewed, move to the desired category and left click the mouse. The employees' data will be displayed.

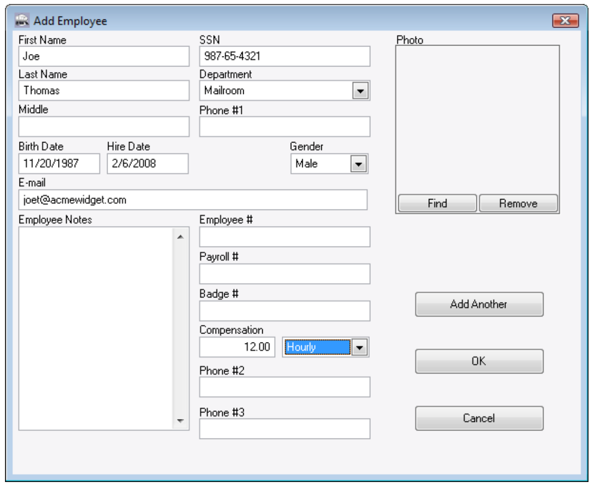
Add an Employee

To add an employee, click the **Add** button under the name box.

> Note – Before you add employees, it is recommended that your organization data such as Departments be set up. To set up your organization information see Chapter 4 – Setting up Organization Information.



Enter employee data on the Add Employee Screen. The only required data to be entered is Last Name. The system assumes the hire date is the current system date. If the hire date is something other than the current system date it can be overridden by selecting and entering the correct hire date. You can enter basic employee information only on this screen. After completing the information for a new employee you can add another employee by clicking **Add Another.** Once you have finished, click **OK**.

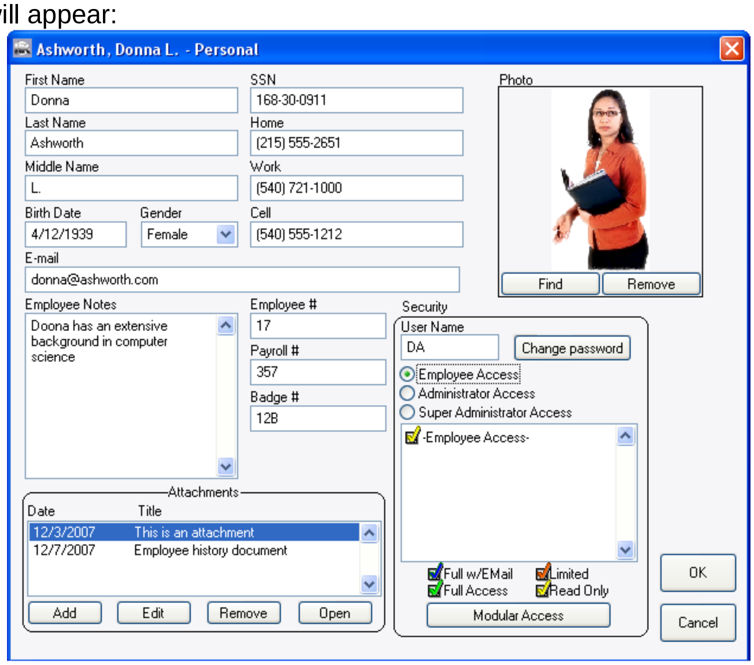


Note – Additional information about an employee is added through the 14 categories located on the employee data screen (Figure 5-1).

Edit Employee Data

To maintain an employee's personal information, click the **Edit** button or double click **personal**.

The following screen will appear:

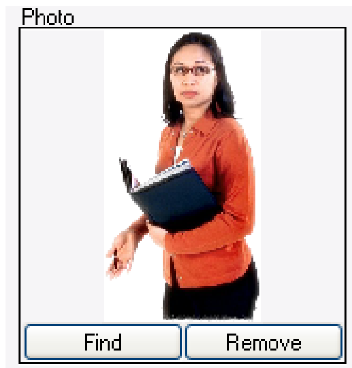


At this point you can edit basic employee information. Address and Address History information has its own screen (see Address History).

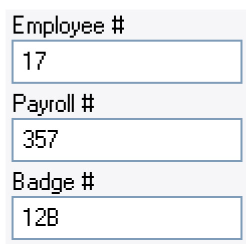
You can make multiple attachments about an employee from this screen.

Category Attachments have their own screens.

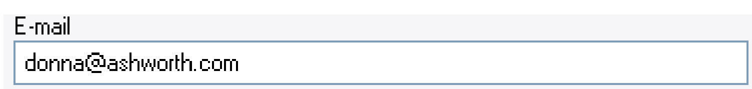
An employee photo may be attached from this screen. Click **Find** to attach a photo or click **Remove** to un-attach the photo from the employee record.



Since Employee Numbers, Badge Numbers and Payroll Numbers may differ for each employee, we have provided you a method of maintaining each.



The Employee's E-mail is a very useful field because HR will allow you to send any report to an employee or employees at will (Reports). This is a powerful feature used to notify an employee of a change in their recorded employee history, attendance history or work history. We also find this feature useful to send a manager a Department Level Report. Of course in order to use this feature you must provide an E-mail address for each employee you wish to notify. You may do this here:



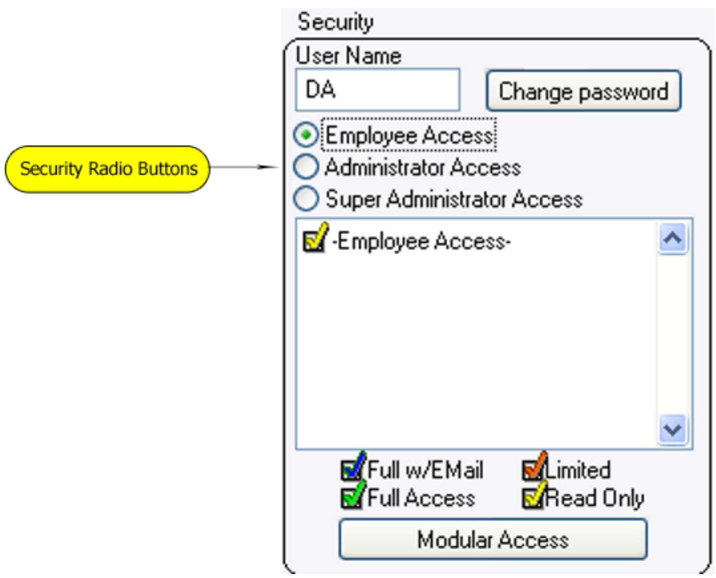
Security

The Security options allow the Super Administrator to grant Administrator privileges to users managing departments and to assign which departments they have access to. The Super Administrator can also grant Super Administrator access to another user.

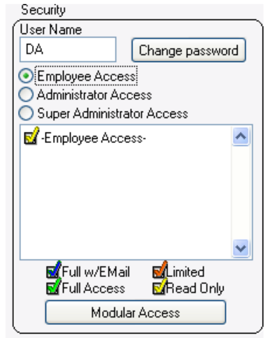
Administrators and Super Administrators can also change a User's Name and Password. Employees can only view their own security setting that by definition is only Employee Access.

To change a Security setting for an employee, click one of the radio boxes

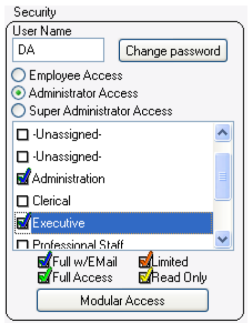
- Employee Access
- Administrator Access
- Super Administrator Access



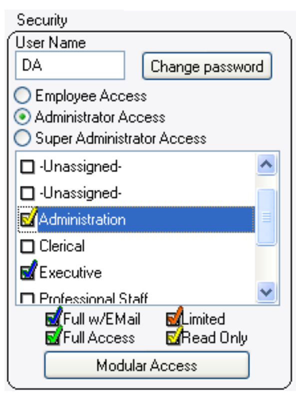
and then by activating a check box, you will activate that option. To turn off an option click the appropriate checkbox. The following screen shows that this employee may access their own information.



Notice that an administrator can be assigned to more then one department without being assigned to all departments. The following screen shows that this administrator may access two different departments.



Also the administrator's privileges can be set at one of three levels. Clicking on an empty check box will give a blue checkmark, which grants the maximum level of access including the ability to receive leave request emails. If you click on the blue checkmark it will change to the green check mark. This second level grants full read and write access, but the user will not be notified by email of leave requests. Clicking a third time will change the checkmark to yellow which grants access only to view employee absence data for that department,



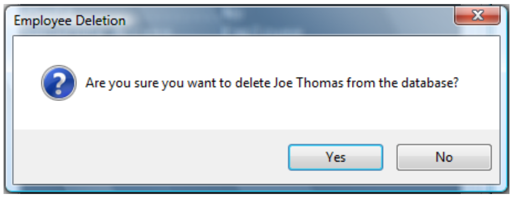
but no access is given to add or change data. If you click a fourth time the checkmark will be removed and the administrator will not have any access to that department.

Removing Employee

If you find it necessary to remove an employee from the database, first make sure that the employee you want to delete is the currently selected employee in the employee list box (Figure 5-1).

> Note - Before doing this, it is a good idea to print all employee reports for that employee to be kept in the employee's permanent file. The reason for this is that once an employee is deleted from ***HR***, all data for the employee is permanently deleted.

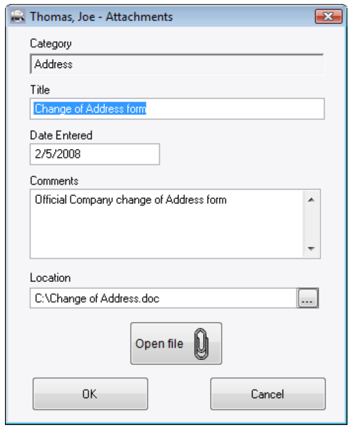
Once you have selected the employee, click the **Remove** Button in the lower left corner of the screen. A confirmation window will appear asking if you are sure you want to remove the employee.



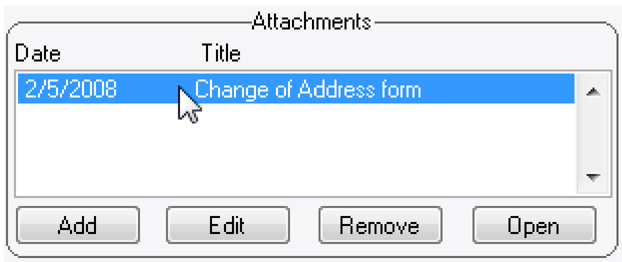
Individual Attachments

HR allows you to enter attachments for each employee. This is covered more in the Attachments section later in this chapter. Another feature of ***HR*** is to add attachments for each category within an employee's record. For example, you can add attachments to the Personal section or to a specific Warning. In each case, each category's sub screen will have an attachment section on the form.

This list specifies the attachments related to that particular category for that employee. For the Personal, Other and Emergency section, the attachments are attached to the whole form. For the other areas (warnings, evaluations, etc), attachments are added to each individual record. For example, if you attach a particular file to a specific evaluation, the other evaluations will not have that attachment. Adding attachments to each section is quite simple. Just click the **Add** button and you will see something like the following screen:



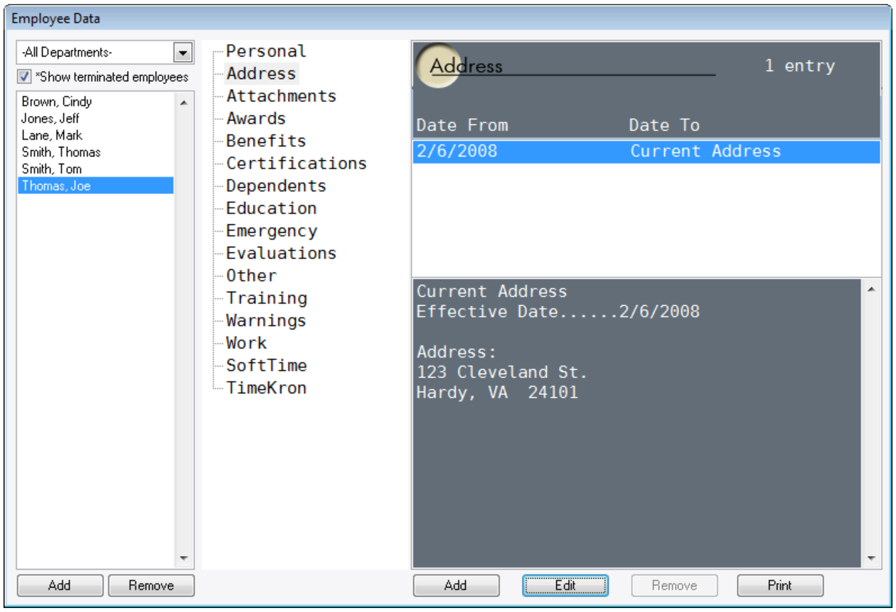
Just fill in the information including file location and click **OK**. You will then see it added to the list.



Clicking on **Edit** will take you to the same form where you can edit the information.

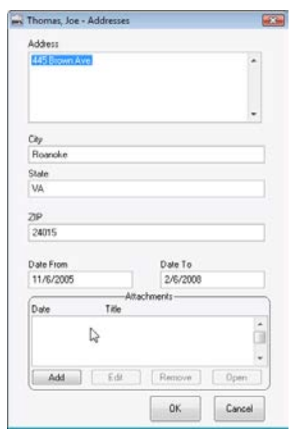
Address

The Address category stores present and past address information for an employee. The information presented on the screen is the current information on the employee. The information in the white grid shows the last time information was changed.



To add, edit, remove or print Address Information, select the action you wish to take at the bottom right of the screen. When you add or edit data, you will see the following screen:

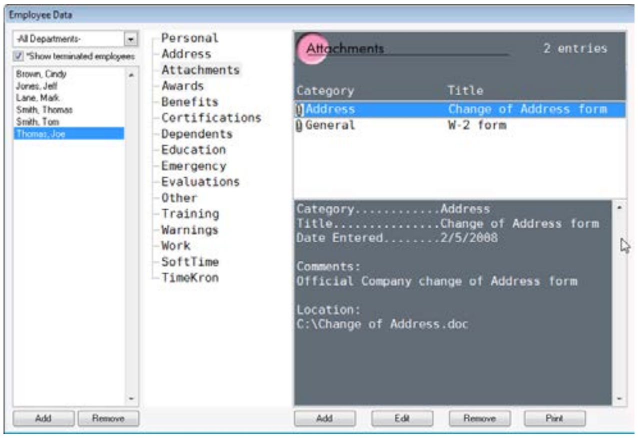
Add/Edit Address Screen



Each employee has a current address. When you edit the current address, you may be creating an address history record, depending on how that option is set up in Super Administrator Options. When you edit a history record (any record but the "current" address), no new records are created.

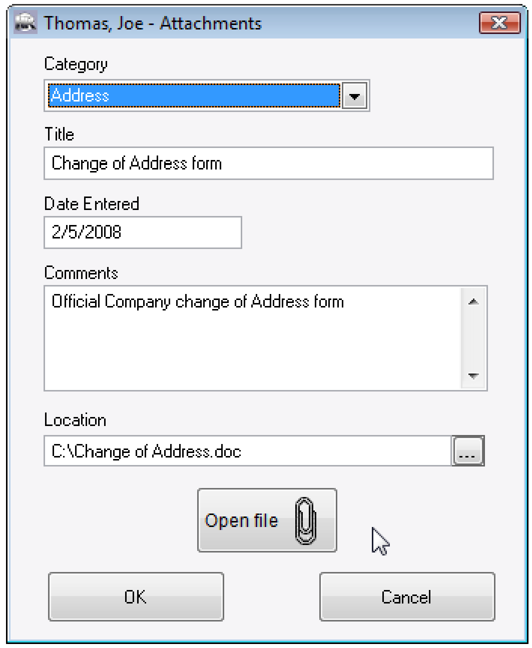
Attachments

HR allows you to electronically store documentation and other files received from the employee. The attachments category lets you see all the documentation and where it its stored. There are two places that attachments can be added, edited, removed or printed, at the individual category level or through the attachment screen directly. To review an attachment, select the attachment in the white box and double click.



To add, edit, remove, or print attachment information select the action to be taken at the bottom right of the screen. A new screen will appear, enter the data and click **OK**.

Attachments Entry Screen

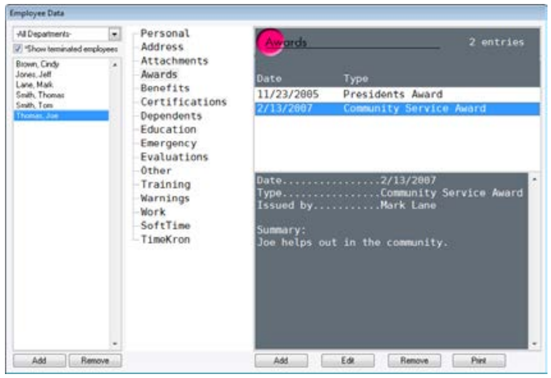


When viewing the main list of attachments for an employee, you will see all attachments from all categories. When adding an attachment through the main attachment section, you can choose the category it belongs to. However, it won't be attached to any specific sub-section unless you add it through that section.

Note: Attachments can be any type of file, word processing, spreadsheet, picture, etc. To view the attachment, double click the attachment and it will open in the appropriate application.

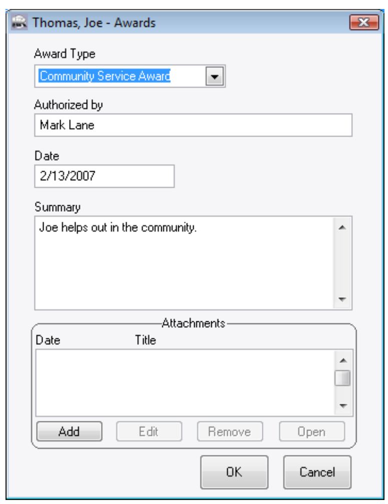
Awards

The awards category allows you to document awards and other honors an employee has received. The information on the screen shows the last award added to the database. The information in the white grid shows all awards received by the employee.



To add, edit, remove, review or print award information highlight Award and select the action to be taken at the right hand bottom of the screen. A new screen will appear. Enter the data and click **OK**.

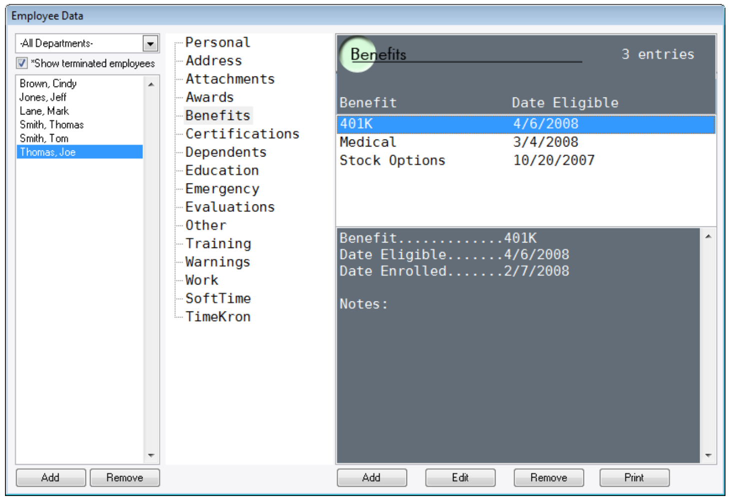
Awards Entry Screen



Note: You can attach a copy of the employee's Award. If it is a certificate, letter or any other piece of documentation, you can scan it on to your computer and add it to ***HR***, eliminating paper that must be stored.

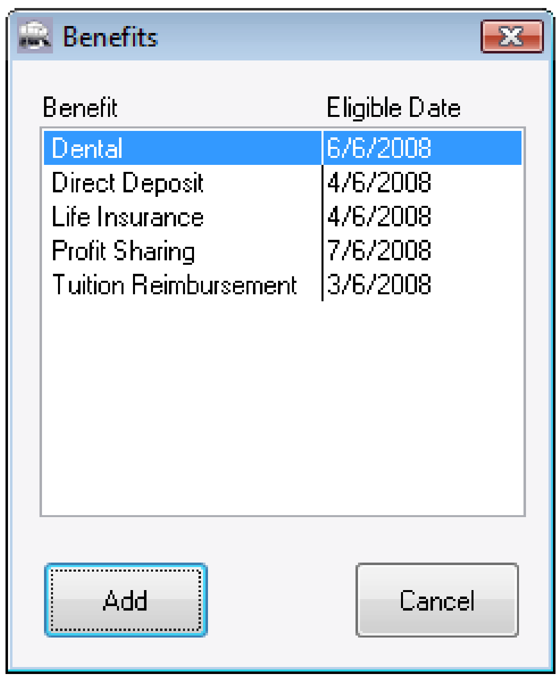
Benefits

Companies offer many benefits from dental and medical, to 401K retirement plans. To assign a benefit to an employee, you must first define the benefit in the Organization Benefit Screen.



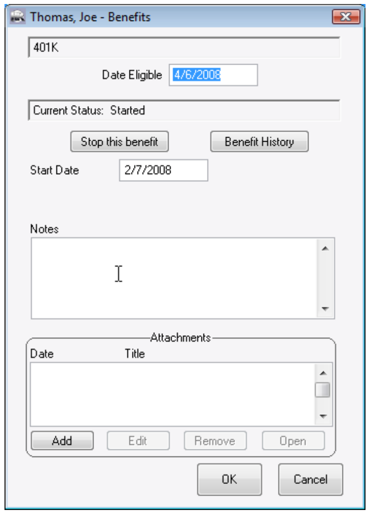
To select a benefit from the Organization Benefits and add it to the employee’s current benefits, click **Add**. To review a benefit, select the benefit in the white box and double click.

From the list of Benefits, select the benefits to be added to the employee and select **Add**.



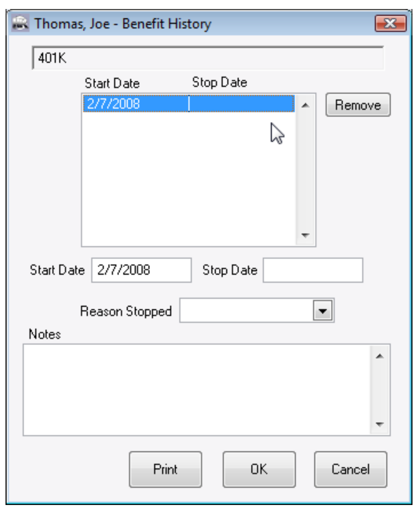
Benefit Entry Screen

Once you've added or edited a benefit, you will see the following screen.



The Date Eligible can be modified by clicking in the date field. Benefits for each employee can have three statuses: Not yet started, Started, Stopped. The form will tell you what the current benefit's status is. The button to the left directly underneath the benefit's status will show you what action you can take for the current benefit, which usually means starting or stopping it.

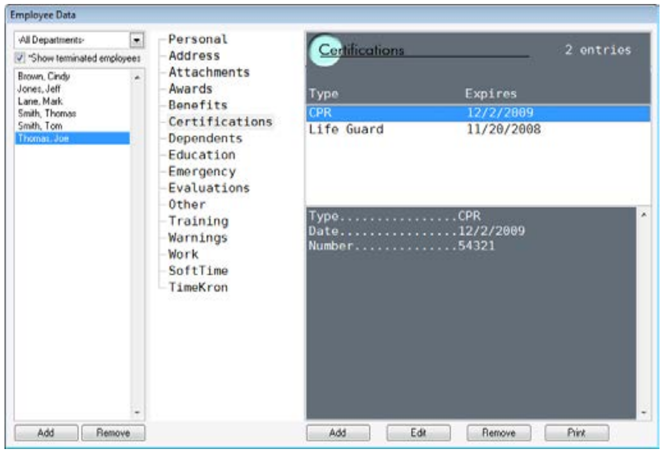
To review the history on the benefit or stop the benefit click **Benefit History.**



The benefit history screen shows a history of when you've started or stopped the benefit for the employee. On the Benefit History screen you can enter a Stop Date, Reason Stopped and make Notes. When you enter an End Date or Reason Stopped, the date enrolled will disappear on the Benefits screen.

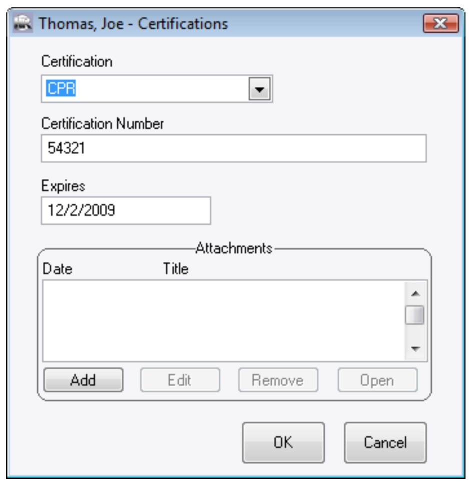
Certifications

HR allows you to track employee certifications along with certification number and expiration date.



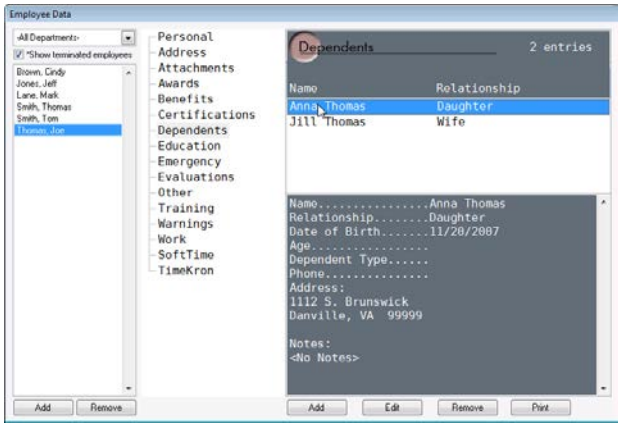
To add a certification click **Add**, enter the information on the add screen and click **OK**.

Certifications Entry Screen



Dependents

HR allows you to keep track of an employee's dependents. You can specify the relationship of the dependent to the employee, the dependent type (i.e. children, spouse, and parents) and additional notes and attachments.



To add dependents, click **Add** and enter the dependent information.

Dependents Entry Screen

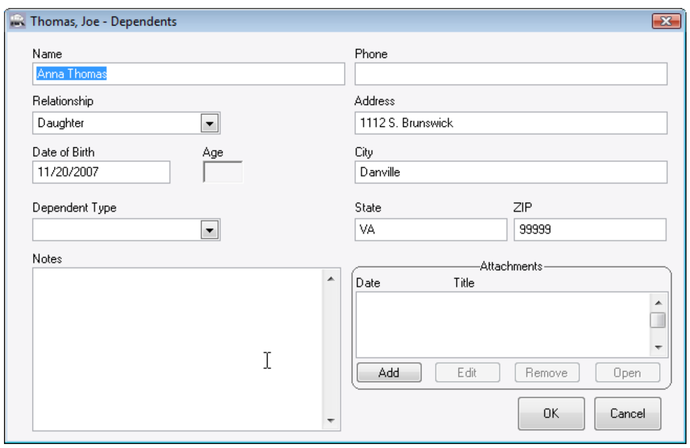
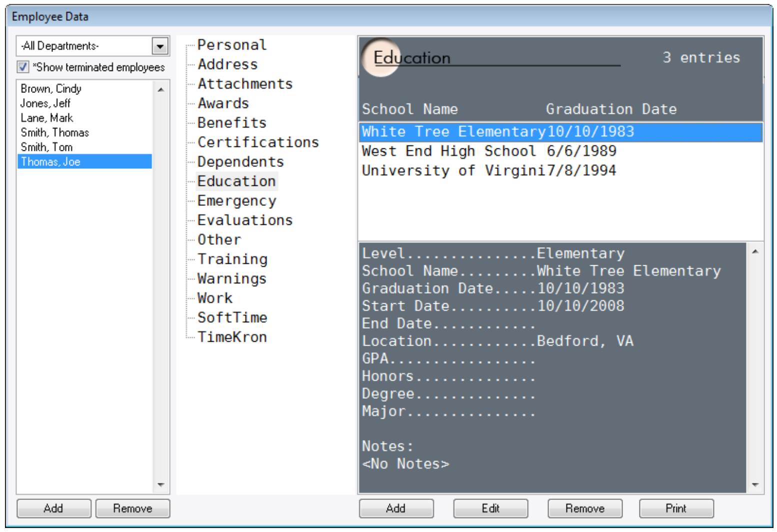


Figure 5-17

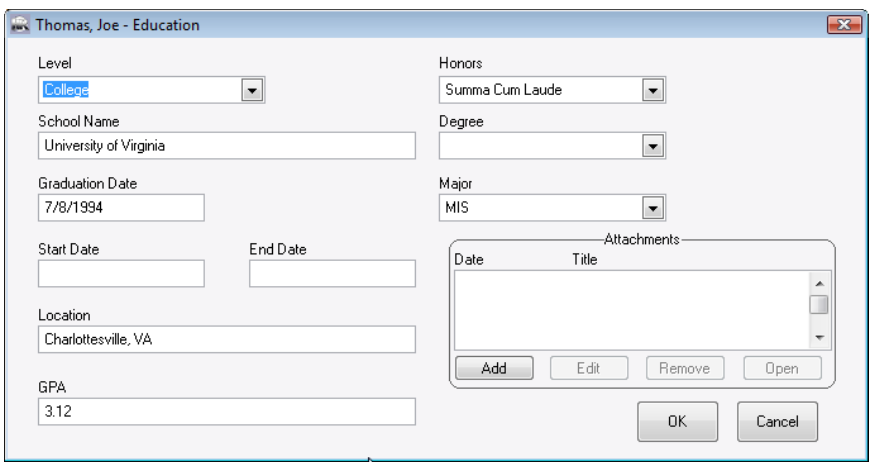
Education

HR allows you to keep track of your employee's formal education. You can enter information for several types of schools (elementary, high school, college, and graduate) and add diplomas through the attachments screen.



To add education, click A**dd** and enter education information.

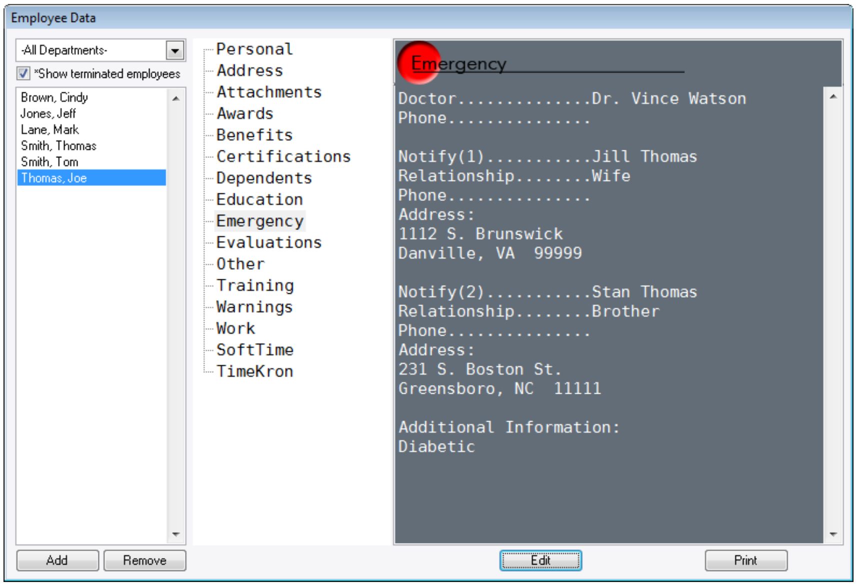
Education Entry Screen



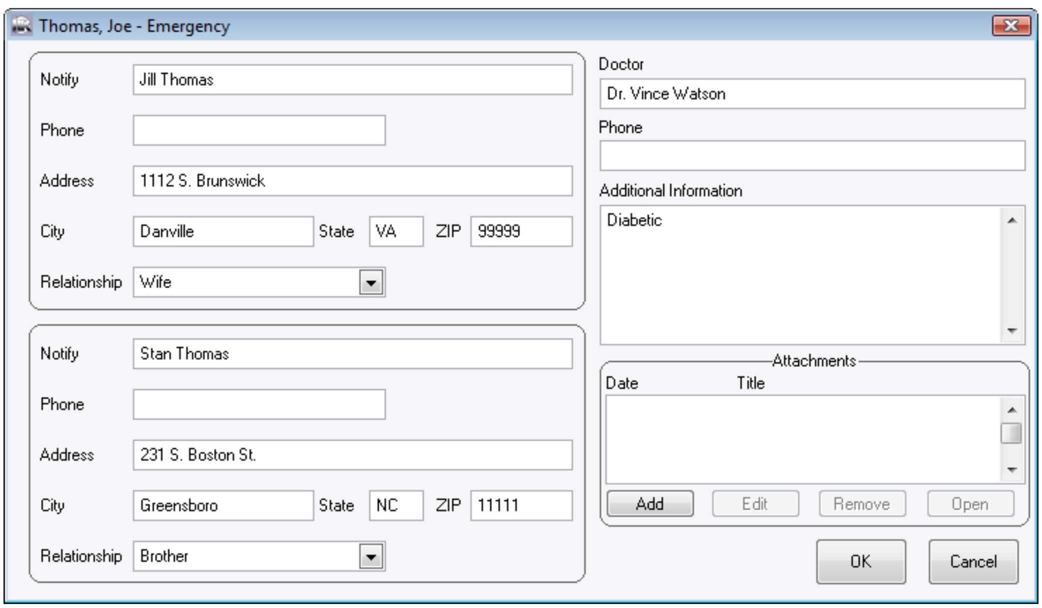
Note: *HR* pre-defines the Level available. You can not add, modify, or delete a Level.

Emergency

HR allows you to store emergency information for an employee in case of employee accident or other crisis. You may enter up to two (2) people to contact. You can also record additional emergency information for an employee such as doctor, medical conditions or any other pertinent information as well as attachments.

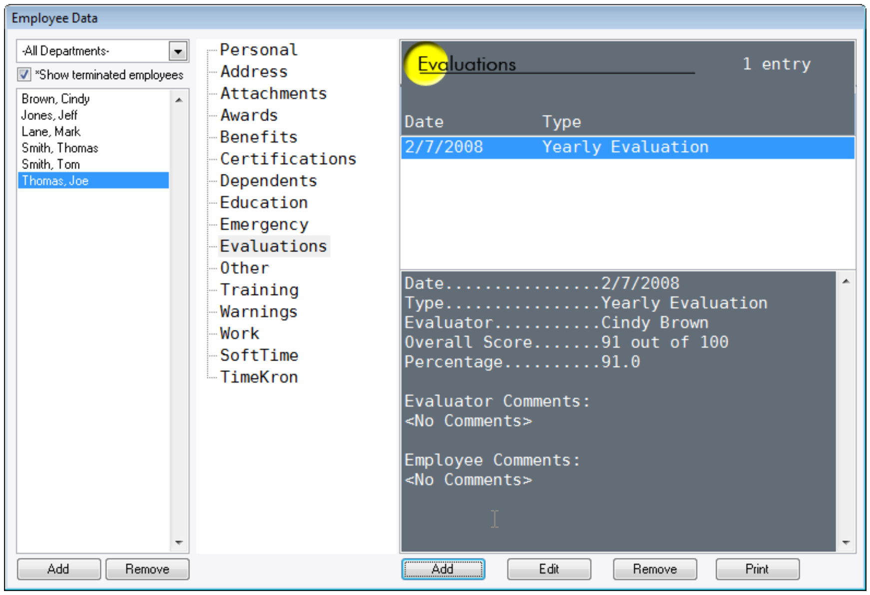


Emergency Entry Screen



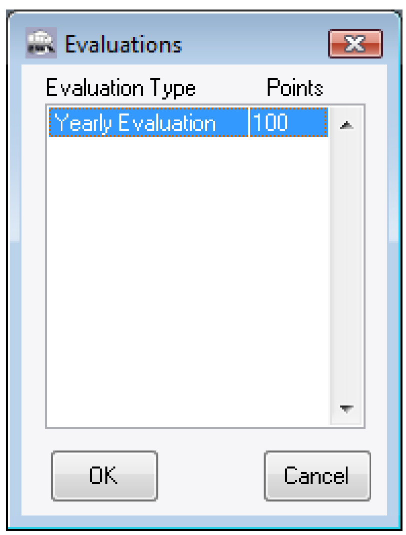
Evaluations

Employee evaluations can be a powerful tool to motivate and manage your employees. ***HR*** allows you to design and record your own evaluations.

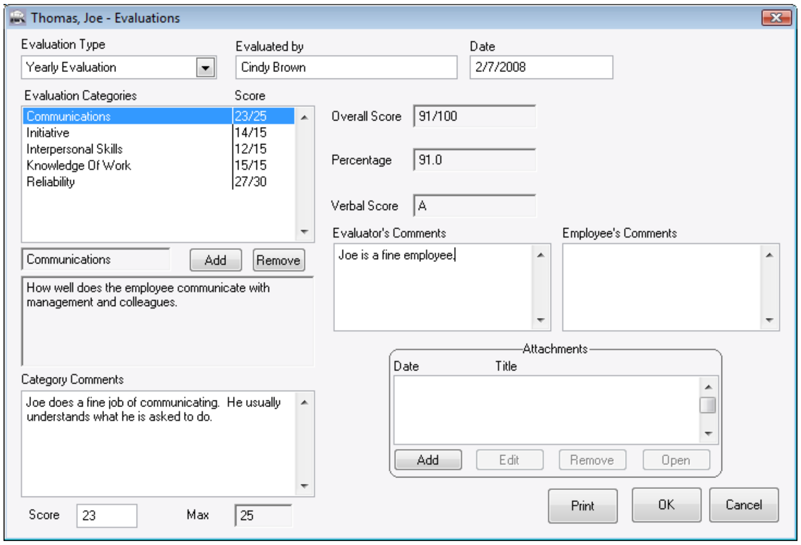


To add an evaluation for an employee, click the **Add** button.

The Select Evaluation window will appear. Select the evaluation you want to add from the Evaluation Type and click **OK**.



After you select an Evaluation Type, ***HR*** will launch the Main evaluation screen. (Figure 5-24). For each category, you can enter comments and assign a score between 0 and the maximum score. After completing the evaluation you can see the overall score, its percentage of the maximum and verbal score. The verbal score is determined by the percentage and defined in organization defaults. You can record evaluator and employee comments and add a copy of the review in the Attachments area.



Other

This category tracks miscellaneous employee details. Miscellaneous fields include spousal information, EEO Codes, Disability, Military Status, Work Permit Number, Union, I-9 and user defined fields.

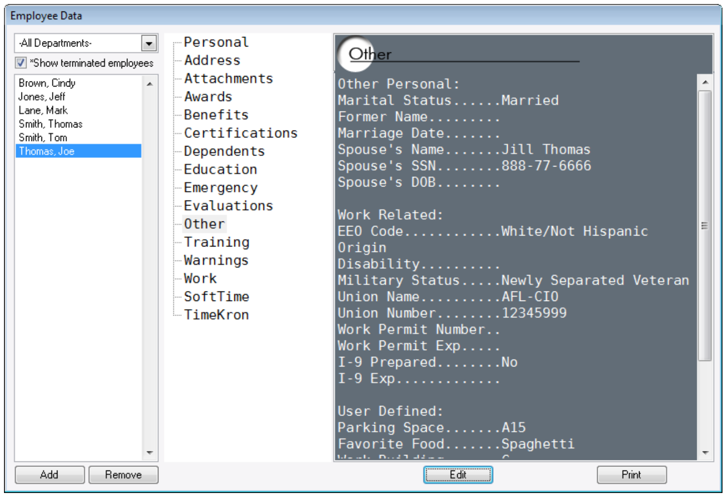
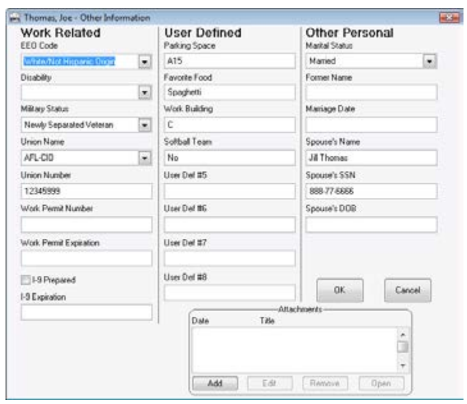


Figure 5-25

Other Entry Screen



Training

Training information is similar to formal education but contains information about job related studies. You can track information on training, date attended, instructor, grades, notes and attachments.

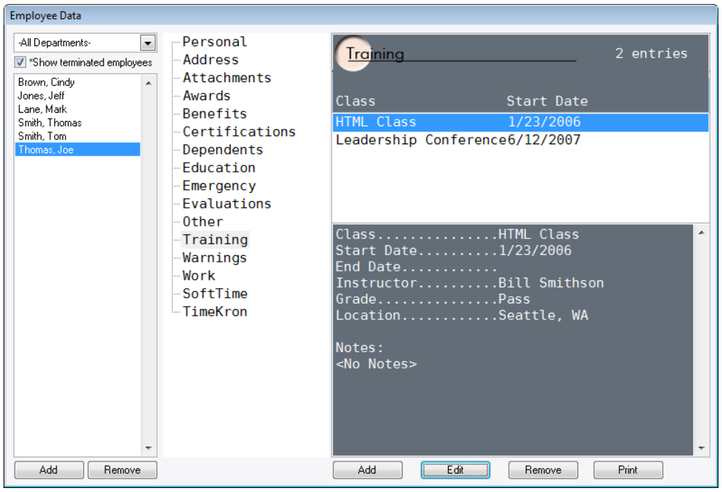


Figure 5-26

To add a training class, click **Add**.

Training Entry Screen

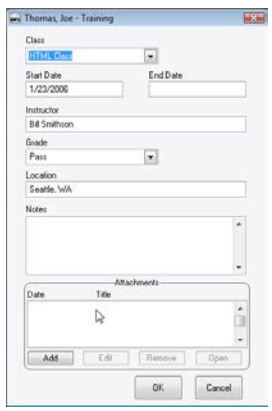


Figure 5-27

Note: If there is a training class that you wish to enter for multiple employees, check out the Group Data Entry section in Chapter 6 - Tools.

Note: Training information certificate of completion can be added to the ***HR*** system by scanning the documentation and attaching it to the employee's file

Warning

Warning information defines the type of warning (usually verbal or written), who issued the warning, and other details about the warning.

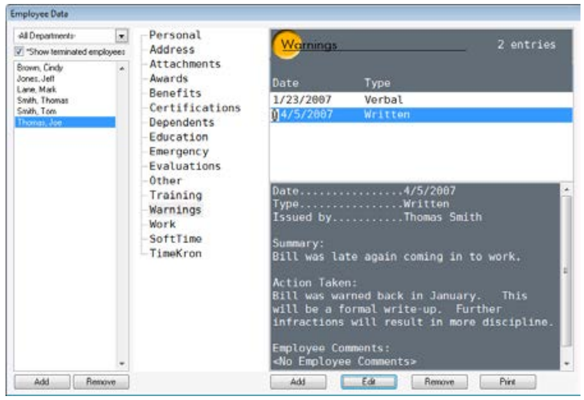


Figure 5-28

To add a warning to the database, click **Add**.

Warning Entry Screen

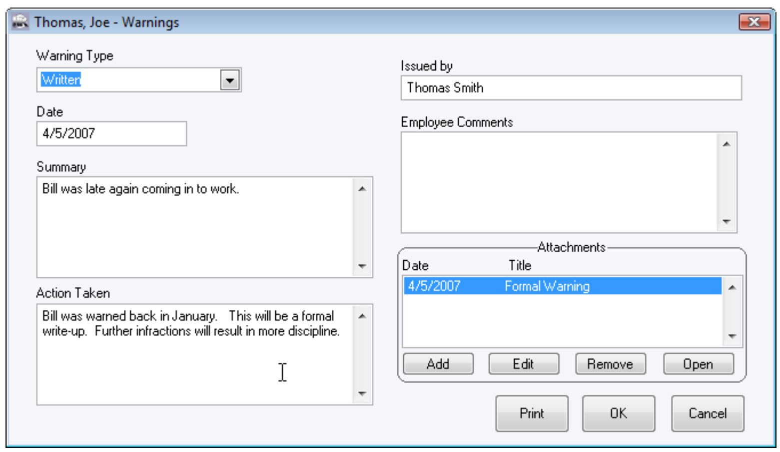


Figure 5-29

Work History

Work information contains primary employment data for the employee. The screen displays Department, Title, Position, Job Status, Reason, Hire Date, Termination Date, Compensation, Supervisor, Job Description, and Attachments. The current Work Information section contains the employee's present work record. Past work records can be selected by double clicking on the event in the white box.

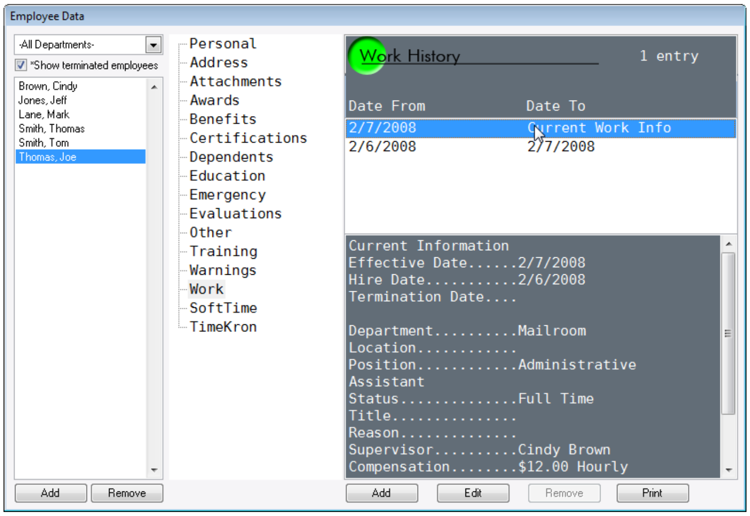


Figure 5-30

To add a new record, click **Add**.

Work Entry Screen (Current)

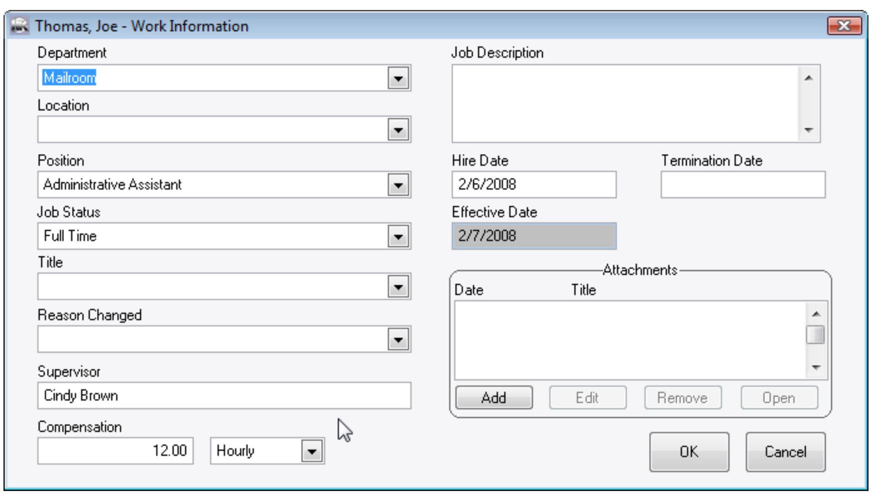
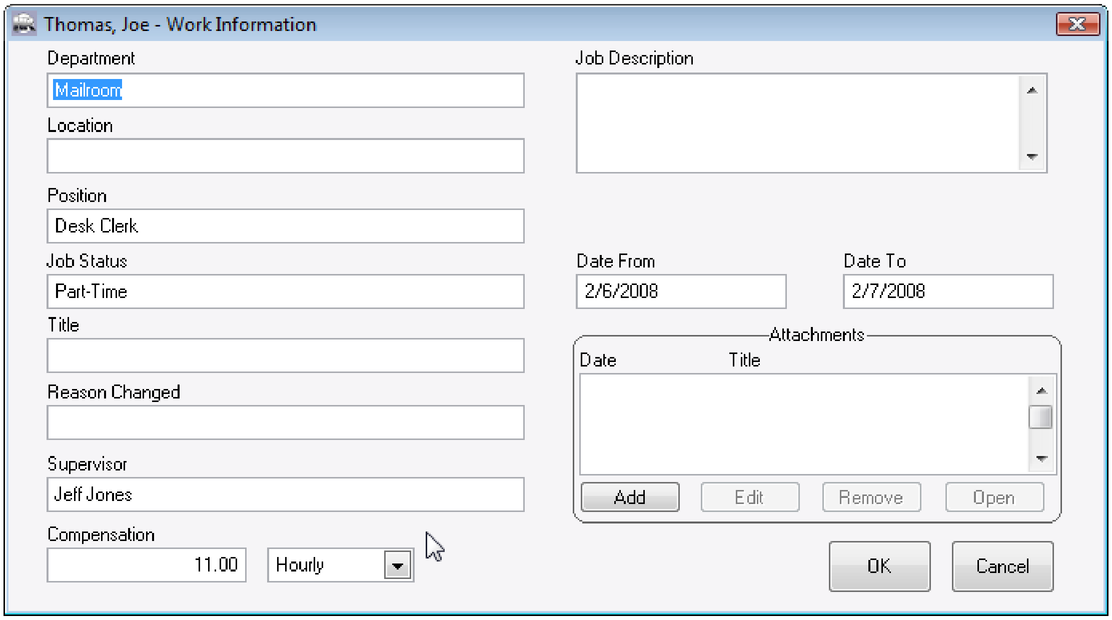


Figure 5-31

Work Entry Screen (History)



When editing the current work history record, a work history record may be added depending on the Work History settings in the Super Administrator Options. Notice that the current Work Record (Figure 5-31) has drop down list boxes that allow you to select departments, positions, etc. The history Work Record does not. The history record has free form text fields where you can enter information.

SoftTime

HR interfaces with our SoftTime Attendance Control System. Here you can view the selected employee's current FYI absence information, just as you would see it in SoftTime.

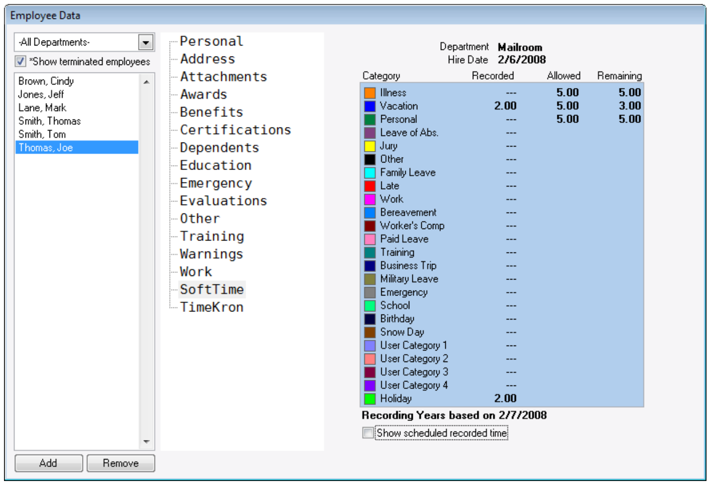


Figure 5-32

TimeKron

HR also interfaces with our TimeKron Complete Timekeeping System. Here, you can view punch data for the employee for the current work week.

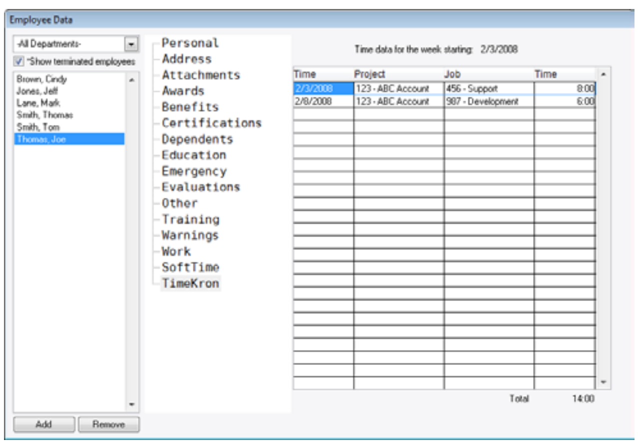


Figure 5-33

Chapter 6 Tools

HR has three tools to help you stay organized. ***Checklists*** allow you to print a list of tasks that must be completed for a specific event, such as hiring a new employee; ***Office Assistant** which* helps you maintain complete data by telling you what employee data is missing; and ***Group Data Entry*** which allows you to enter data for multiple employees at one time, such as Training.

Checklists

Checklists assist you in office management by creating a list of items that need to be completed for a particular event. For example, you may want to generate a checklist for everything that is needed for a new hire to complete or have on their first day of employment.

To create a checklist, click **Tools->Checklists** on the taskbar. The Checklist screen will appear (Figure 6-1).

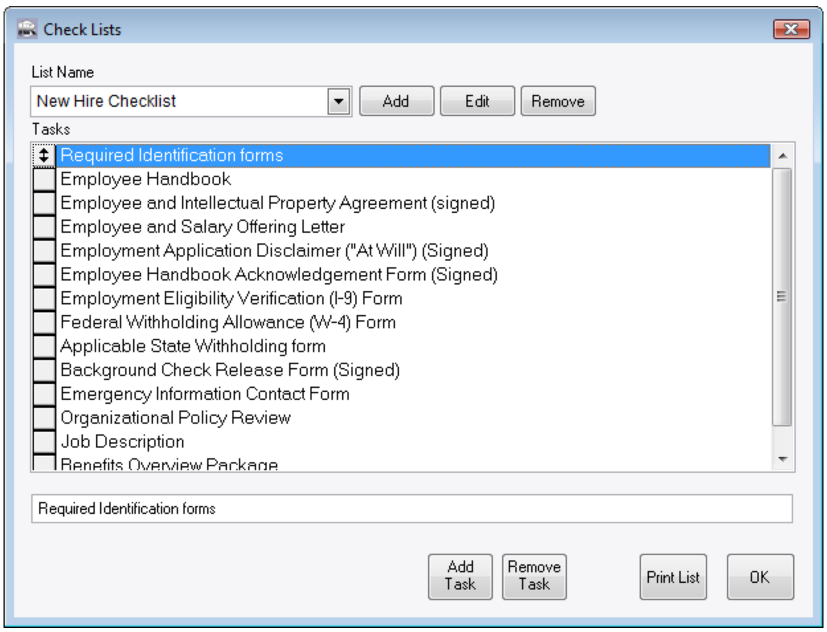


Figure 6-1

Click **Add** to the right of the drop down box. In the Add Checklist box (Figure 6-2) enter the name of the checklist, such as “Volunteer Award Checklist”, Click **OK**.

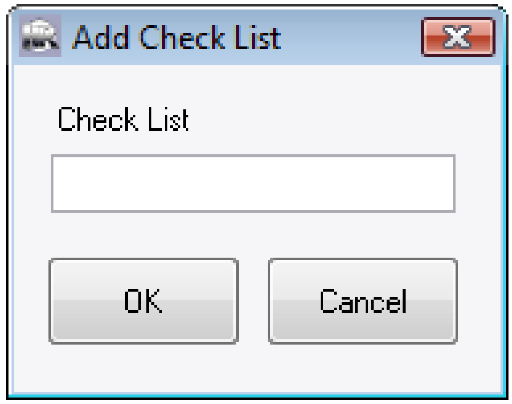


Figure 6-2

To select a checklist, click the **List Name** in the drop down box and select the desired list. You can edit the name of a Checklist by clicking the **Edit** button. To remove a Checklist, click the **Remove Task** button to the right of the drop down box.

To add tasks to a Checklist, click **Add Task.** Your task will appear in the box under task. To change the order of a task, click the order box next to the task, hold the left mouse button down and drag it to another position in the list. To remove a Checklist task, select the task from the list and click the **Remove Task** button.

Office Assistant

The Office Assistant checks your employee and department information for specific items and informs you of possible errors. You can instruct the Office Assistant to check for missing information or other anomalous data patterns. To run Office Assistant, click **Tools-> Office Assistant** on the toolbar.

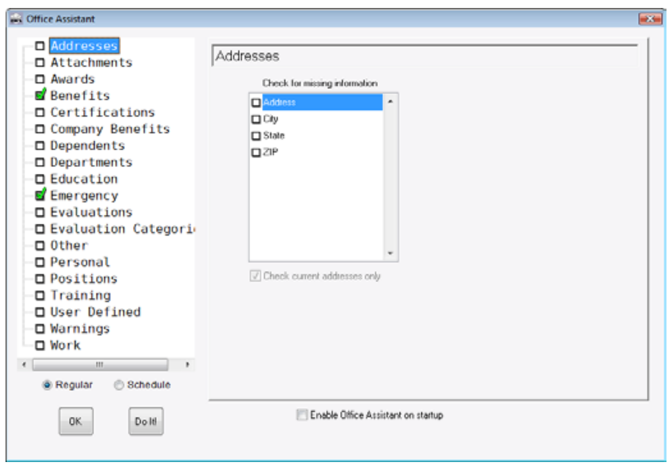


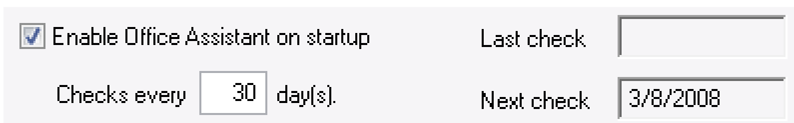
Figure 6-3

Note: To access the Office Assistant you must have security access to All Departments and edit access to personal information.

The Office Assistant will only check the information that is checked in the left box (Figure 6-3) such as addresses, personal, etc. To select the category to be checked by the Office Assistant, click the category, and click the items listed in the “Check for missing information” that are to be checked. To remove an item, uncheck the item you want to remove. Selecting a category will cause the Automatic Office Assistant to display the items in that category. There are 19 categories that the Automatic Office Assistant can check for you. Each one of these categories has several items. You must select an item to have it checked.

Running and Checking Your Data

There are two modes for selecting data, Regular mode and Schedule mode. You can create a separate list for each mode. Regular mode can be run at anytime by selecting the information you would like to check and clicking “**Do It**”. Schedule mode is run on a set schedule defined by you. To set up the schedule, click Schedule and check the “Enable Office Assistant on startup. Determine how often you would like to run Office Assistant and enter a period (in days) in the “Check every X days box. Where “X” indicates the number of days between runs, such as 7 would run the check every 7 days or once a week. The Automatic Office Assistant will display the date of the next scheduled check and will also display the last date the Office Assistant performed a scheduled check. Scheduled checks occur at start up on the day they are scheduled. It will also display the last date a scheduled check was performed.



Office Assistant Categories

Below is a list of the Office Assistant categories and the items in that category you can select to check for missing information. You can check both organization and employee information. The items are listed in italics after the category heading.

Organization Categories

Company Benefits

Eligibility Information, Continuation Information, Details

Departments

Manager, Assistant, Details

Evaluations Categories

Category Name, Description

Positions

Position Name, Min Rate, Mid, Rate, Max Rate, Pay Rate Description

User Defined

Parking Space, UDef #2, UDef #3, UDef #4, UDef #5, UDef #6, UDef#7, UDef #8

Employee Categories

Address

Street Address, City, State, Zip

If you want The Automatic Office Assistant to check the current employee address only, be sure to select the "check current address only" box

Attachments

Title, Date Entered, Comments

Awards

Authorized by, Summary

Benefits

The Office Assistant will check for benefit eligibility provided that the "check for benefit eligibility option" is checked. All of your company benefits are listed in the benefits box. Select the benefit(s) that you want the Office Assistant to verify. You can check when an employee will be eligible for benefits (Now, 30 days, 60 days, or 90 days). You can have ***HR*** check benefit information that must be stopped for terminated employees.

Certifications

Expiration Date, Certification Number

The Office Assistant will check for certification expiration and missing certification information. Select the "check for certification expiration" option. This will enable you to select your company's certifications from the certification list. You can have blank expiration dates be equivalent to expired dates. You can also check when a certification will expire (Now, 30 days, 60 days, 90 days).

Dependents

Date of Birth, Relationship, Dependent Note

Education

Date To, School, Location, Date Graduated, GPA, Honors, Degree, Major

Emergency

Notification 1, Address 1, Phone 1, Relationship 1, Notification 2, Address 2, Phone 2, Relationship 2, Doctor, Doctor Phone

Evaluations

Evaluation Date, Evaluation Type, Evaluator

The Office Assistant will check when your employees were last evaluated. Select "Check for employees who were last evaluated", option. You can check when an employee was last evaluated by clicking (30 days ago, 60 days ago, 90 days ago, 3 months ago, 6 months ago, 9 months ago, 1 year ago or give ***HR*** the number of days).   You also check for employees who have never been evaluated.

Other

EEO, Disability, Military Status, Work Permit Number, Work Permit Expiration, I-9 Prepared, Union Name, Union Number, Martial Status, Former Name, Marriage Date, Spouse's Name, Spouse's SSN, Spouse's Date of Birth

The Office Assistant will check for work permit expiration. Select "Check for employees who have work permits expiring" option. You can have blank expiration dates be equivalent to expired dates. You can also check when a work permit will expire (Now, 30 days, 60 days, 90 days).

Personal

First, Last, Middle Name, Date of Birth, Social Security Number, Phone #1, Phone #2, Phone #3, E-Mail, Sex, Hire Date, Payroll Number

Training

End Date, Location, Instructor, Grade

Warnings

Warning Type, Issued by

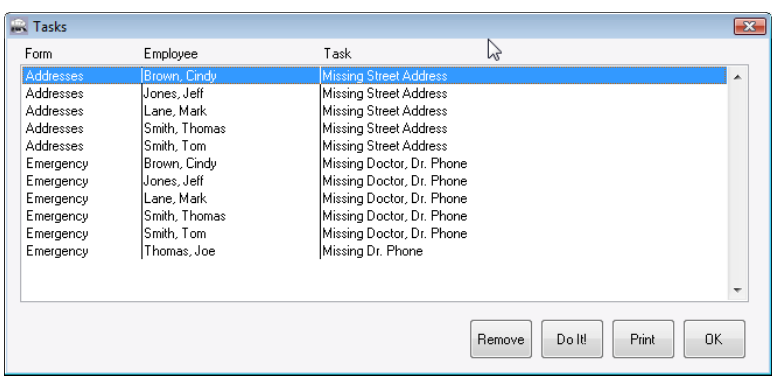
Work

Department, Title, Position, Job Status, Compensation, Reason Changed, Supervisor, Location

The Office Assist will check work history records automatically; if you do not want work history checked deselect the "Check work history records" option.

Completing Tasks

Once you've chosen the areas you want ***HR*** to check, click the **Do It** button to perform the check. If any area returns unfinished tasks they will appear in the following screen:



To perform a task, click the task you want to perform and you will be taken directly to screen to complete that task.

Group Data Entry

Group Data Entry allows you to add information to multiple employees at one time, such as Training. To use Group Data Entry, click **Tools-> Group Data Entry.**

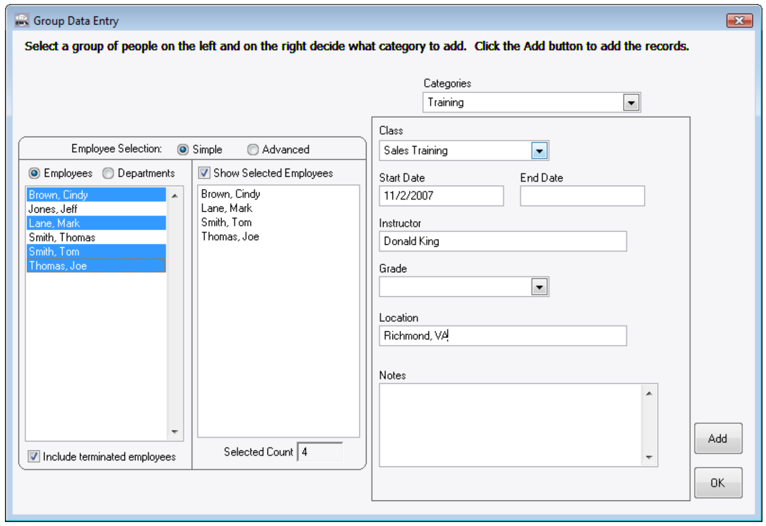


Figure 6-4

HR allows you to select a group of employees, departments (Figure 6-4) or use advanced selection criteria (see Chapter 7-Reports). Once you've selected a group of employees, select the category that you want and then fill out the corresponding information below. You don't necessarily have to fill out every field. Once you've got all the information entered, click **Add**.

Chapter 7 Reports

HR allows you to preview and print over 70 reports in twelve different categories. Reports range from individual work history to department headcount. Each report has different options. This chapter explains common report features to all reports.

To access the reports, click **Reports->Employee or Organization Reports** on the toolbar. Select the category of the report you want to view from the drop down list box. Each report available for that specific category will appear.

Common Report Features

Figure 7-1

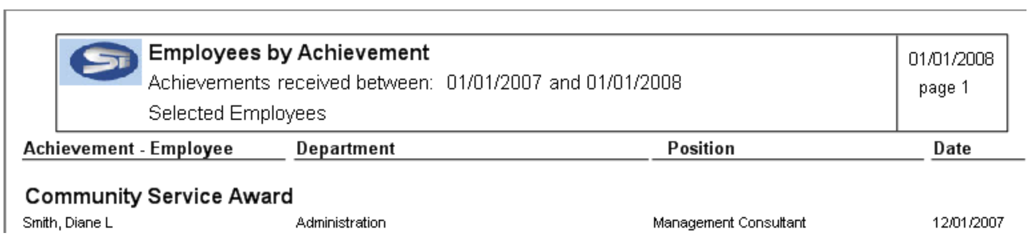


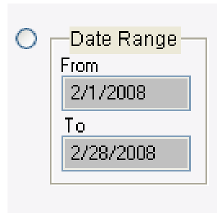
Figure 7-2

The following information will be seen in most reports.

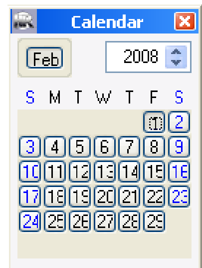
Report Title

The name of the report will appear in the report title box. Each report comes with an assigned name, but it can be changed. Below the Report Title is the report description giving a brief description of the report.

Date Range



You can choose a date range for your report by specifying a from and to date. By default, the report will use *all dates*. By right clicking on any date, the Mini Calendar will appear allowing you to select a date.



Administrator Title Lock

When a Report Title is changed, it is changed for the entire system. To lock down the report title, click the Administrator Title Lock. Only an administrator can change that report title. Administrator lock can be set for each report.

Low Resolution Printers

Low Resolution Reports allows for printing faster. However, graphic images will not print in this mode. Some printers do not have enough memory to print ***HR*** reports properly. If you that a problem, try printing in low resolution mode.

Company Logo in Header

In the Super Administrator Options form, you can specify a Company Logo to appear in reports. If you have a company logo specified, check this box for the logo to appear on reports.

Company Name In Title

In the Super Administrator Option form, you can specify a Company Name to appear in reports. If you want the company name to appear in the report, check this box.

Print Button

This button will print the current report.

Preview

This button will allow you to Preview the report before printing, emailing or creating an HTML document. In the Preview mode, a Report Preview Toolbar will appear on the screen

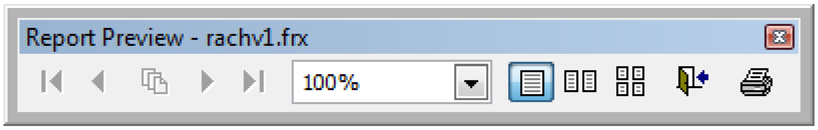


Figure 7-3

The Report Preview Toolbar allows you to select any portion of the report you want to view. With the Report Preview Toolbar you can:

- Move to the first or last page of the report
- Move to the previous or next page of the report
- Move to a specific page in the report
- View one, two or four pages at a time
- Zoom in or out of the report
- Print the report
- Close the Preview window

E-mail

This button will allow you to e-mail the report to an employee or manager. After clicking on the E-mail button the follow screen will appear:

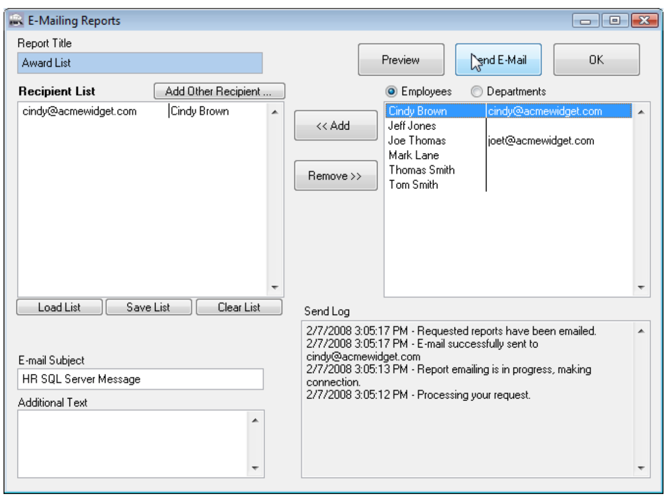


Figure 7-4

The report's title is in the upper left part of the form. If you want to see the e-mail that will be sent, you can click the Preview button. In the lower left part of the form, you can enter the e-mail subject and any additional text you want to include.

The list on the right is a list of employees and their e-mail addresses, if they have one. To add an employee to the recipient list, double click the employee or click the recipient and click the **Add** button. If you want to include a recipient that is not in the list, click the "**Add Other Recipient**", which is located above the Recipient List. A window will appear. Enter the e-mail address of the recipient and click **OK**. If you want to send an email to all employees within a department, click **Departments**, and select the department(s). Only employees with e-mail addresses will receive the report.

Once you have selected one or more recipients, the **Send E-Mail** button will become enabled. When you have selected all the recipients, click this button and it will start sending the E-mails. The Send Log section in the lower right will display the sending progress.

HTML

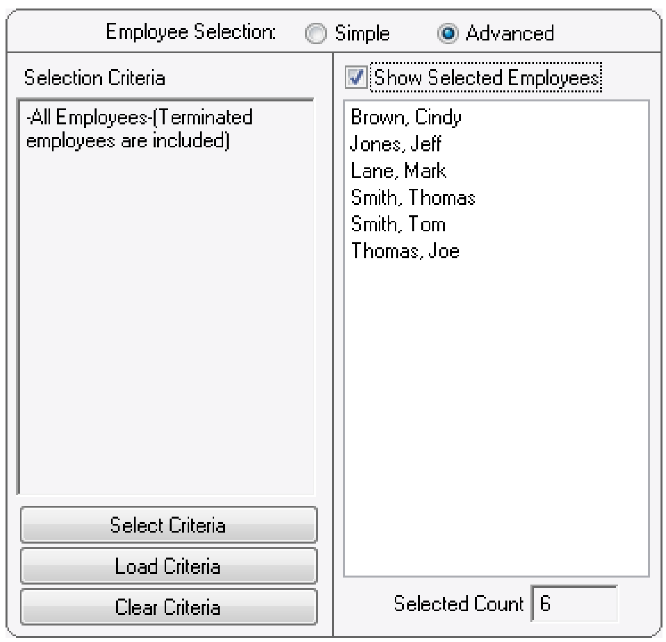
This button will allow you to create and save an HTML document. When the Save Window appears, give the HTML document a name and click **Save**.

Dates

Some reports lets you specify a date range to include in the report. You can also select All Dates or a specific date.

Selection Criteria

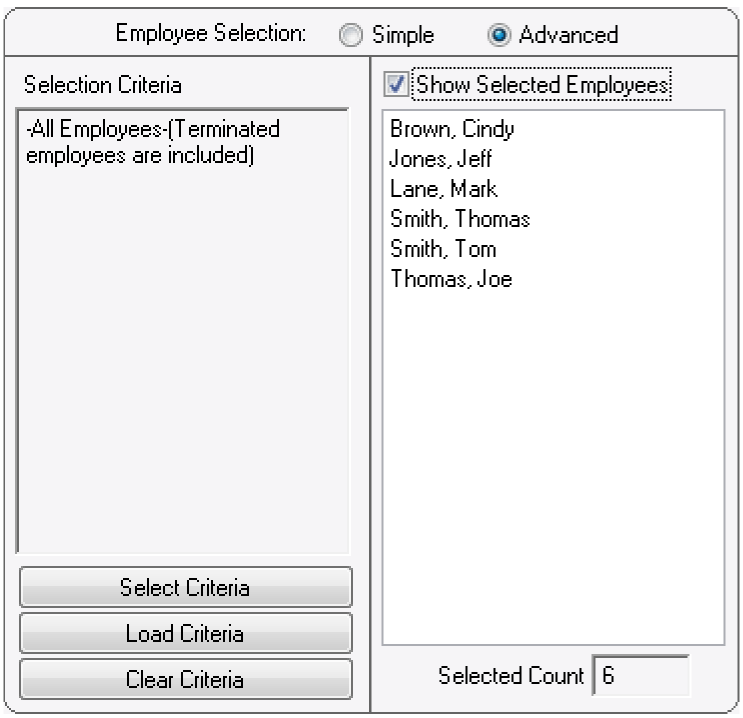
Many reports allow you to specify which category of employees the report should include or exclude.



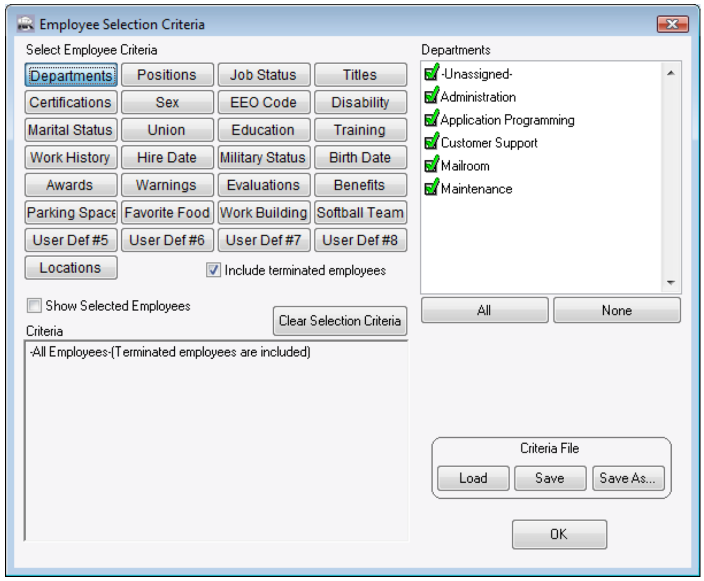
The selection criteria section has both a simple and an advanced mode. The simple mode is similar to what you would see in SoftTime or TimeKron. The simple mode will look like this on the left side.

Here you choose one or more departments or employees.

If you want more advanced options such as limiting based on Job Status or Position, choose the advanced mode.



The current selection criteria are shown in the box to the left. To change the criteria, click the **Select Criteria** button.



Here you can pare down employee lists in 20 different categories. Just select the category, and the list on the right will have the possible options you can check for. Additionally, you can choose Hire Date or Birth Date and specify a date range for those. Each time you adjust the criteria, it will be adjusted in the box.

Also note that you can save and load criteria files. If you want to print reports for Full Time employees in the Administration Department, you can save these settings through this form, and then load them up on a moment's notice. This way, you don't have to redefine your selections. Also note that criteria files can be loaded from the main criteria section on the report form itself.

When you are finished selecting your criteria, click **OK** to return to the main report form. The criteria you have just selected should now be in the box on the left.

NOTE: Selecting none is the same as selecting all. There are no comparisons to be made so all employees will be available.

Multiple Fields for Reporting

Some reports allow you to print data for more than one item (e.g. Benefits Used by Each Employee). To select more than one item, hold down the Control Key on your keyboard while selecting the items you want to show on the report.

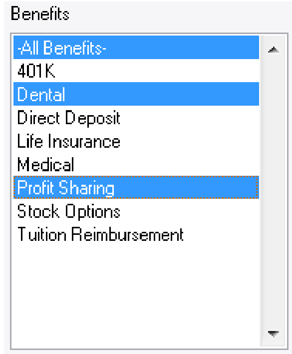


Figure 7-6

Terminated Employees

Many of the ***HR*** reports automatically exclude terminated employees. If you want to exclude terminated employees from a report that includes them, click the **Selection Criteria** button (if available) and deselect terminated employees from Job Status. For a complete list of which reports include Terminated employee information, see Appendix A-Reports.

No Data Available for Printing

If you receive this message when generating a report, then you do not have any data that matches the report criteria. (e.g. If you preview a Birthday report for July and you do not have any employees with a July birthday, then you will receive this message.)

Quick List Report

HR offers an easy to use report writer called Quick List. You can define up to eight categories for the report. You can access Quick List from **Employee Reports > General.**

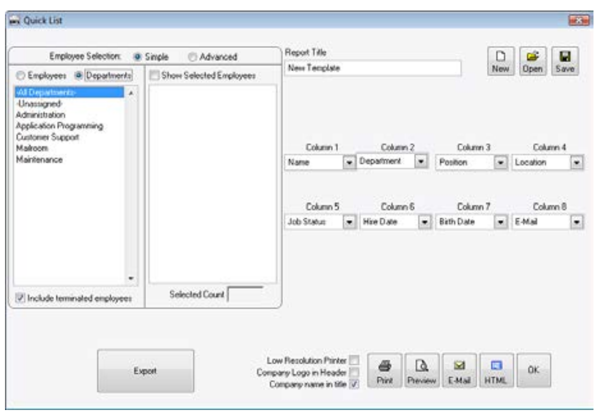


Figure 7-7

Report Title

Enter a title for the report.

Column 1 through Column 8

From the drop down boxes select the data to be displayed in each column on the report. Each column control is a drop down list box, allowing you to select the data to be displayed on the report.

Employee Selection

Here you can select which set of employees to report.

New / Open / Save

The Quick List report allows you to save a report template for later use. The report will save the title, each column as well as the employee selection to be printed.

Export

Export is a very powerful feature.

Clicking the **Export** button will allow the user to export the specified data in the template to be exported to a file.

Supported file types are:

- .xls – Microsoft Excel.
- .csv – Comma Separated files. Generally used for mail merges.
- .txt - Windows text file, which can be used by Microsoft Word or Notepad.
- .dbf – A database file. This is a very useful if you have a programming staff that can provide you with additional reports that do not exist in ***HR***. You can also export data from this format into Microsoft SQL.

Chapter 8 Employee Reports

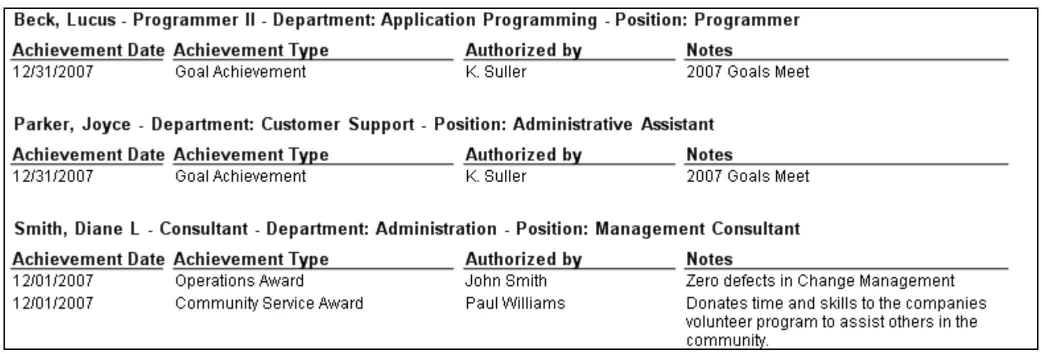
HR has six categories of Employee Reports.   Each report will be explained in detail, grouped by category, with an example of each report.

To access the reports, click **Reports->Employee Reports** on the toolbar. Select the category of the report you want to view from the drop down list box. Each report available for that specific category will appear.

Award Reports

Awards List

This report lists all employees who have received an award. For each award it displays date, type, person giving the award, and notes. Additional information includes employee department and position.



Beck, Lucus - Programmer II - Department: Application Programming - Position: Programmer

Achievement Date	Achievement Type	Authorized by	Notes
12/31/2007	Goal Achievement	K. Suller	2007 Goals Meet

Parker, Joyce - Department: Customer Support - Position: Administrative Assistant

Achievement Date	Achievement Type	Authorized by	Notes
12/31/2007	Goal Achievement	K. Suller	2007 Goals Meet

Smith, Diane L - Consultant - Department: Administration - Position: Management Consultant

Achievement Date	Achievement Type	Authorized by	Notes
12/01/2007	Operations Award	John Smith	Zero defects in Change Management
12/01/2007	Community Service Award	Paul Williams	Donates time and skills to the companies volunteer program to assist others in the community.

Figure 8-1

Awards by Employee

The Awards by Employee report lists all of your employees (by department) who have received an award. For each employee, the report shows the employee's department, position, achievements, and the date each award was received.

Department - Employee	Position	Achievement	Date
Administration			
Smith, Diane L	Management Consultant	Community Service Award	12/01/2007
		Operations Award	12/01/2007
		Presidents Award	11/01/2007
Smith, Thomas	Administratiive Assistant	Employee Of The Day	06/13/2007
		Employee of the Year	05/13/2007
Wade, Hans	<Unassigned>	Goal Achievement	12/31/2007
Application Programming			
Beck, Lucus	<Unassigned>	Goal Achievement	12/31/2007
Customer Support			
Parker, Joyce	<Unassigned>	Goal Achievement	12/31/2007

Figure 8-2

Employees by Award

The Employees by Award report lists all company awards and employees receiving each award. For each award it also lists the employee receiving the award, the employee's department and position, and the date the award was received.

You can choose a date range for your report. If you choose a date range, then only achievements awarded between the *from* date and the *to* date appear on the report. By default, the report uses *all dates*.

Achievement - Employee	Department	Position	Date
Employee Of The Day			
Smith, Thomas	Administration	Administratiive Assistant	06/13/2007
Employee of the Year			
Smith, Thomas	Administration	Administratiive Assistant	05/13/2007
Goal Achievement			
Beck, Lucus	Application Programming	Programmer	12/31/2007
Parker, Joyce	Customer Support	Administratiive Assistant	12/31/2007
Wade, Hans	Mailroom	Clerk	12/31/2007

Figure 8-3

Length of Service Awards

This report lists all employees who have been employed for a specified number of years. For each employee, the report displays the employee's name, department, position, title, and hire date.

You can modify your report by selecting various durations of service. You can choose any or all of the 8 service periods provided.

By default, the report prints the current year's recipients only. If you want to list all employees who have ever received this award and the years they received it, uncheck the "**This year's recipients only**" option. Employees will be listed by their most current award.

Award for 1 Year of Service

Employee	Department	Position	Title	Hire Date
Epson, Sam	Application Programming	Programmer	Sr. Programmer...	12/01/2007
Smith, Diane L	Administration	Management Consultant	Consultant	11/10/2007
Smith, Thomas	Administration	Administratiive Assistant	Cook	06/04/2007

Award for 2 Years of Service

Employee	Department	Position	Title	Hire Date
Beck, Lucus	Application Programming	Programmer	Programmer II	01/02/2006

Figure 8-4

Benefit Reports

Benefits Used by Each Employee

This report displays all employees, by department, who are currently receiving a company benefit. For each employee, the report also displays the employee's position, benefits received, and the start date for each benefit.

Department - Employee	Position	Benefit	Date Started
Administration			
Smith, Diane L	Management Consultant	401K	11/10/2007
		Dental	11/10/2007
		Life Insurance	11/10/2007
		Medical	11/10/2007
Application Programming			
Beck, Lucus	Programmer	Dental	01/01/2008
		Dependent Care Spending Acct	01/02/2008
		Health Care Spending Account	01/02/2008

Figure 8-5

Company Benefits Available

This report will show all of your company's benefits with a description of each. It also displays when employees become eligible for each benefit and if the benefit continues after the employee is no longer employed.

401K

Description: Employee Retirement Plan
Eligibility: Eligible for benefit after 6 months.
Continuation: Benefit does not continue after termination.

Stock Options

Description: Company Stock Options
Eligibility: Eligible for benefit after 6 months.
Continuation: Benefit does not continue after termination.

Dental

Description: Dental Insurance
Eligibility: Eligible for benefit after 90 days.
Continuation: Benefit continues after termination for 18 months.

Tuition Reimbursement

Description: Employee Continuing Education
Eligibility: Eligible for benefit after 6 months.
Continuation: Benefit does not continue after termination.

Figure 8-6

Employee Benefit History

The Employee Benefit History report displays all of your company's benefits available for an individual employee. The employee name, position, and department are displayed in the report header. Information for active benefits includes current benefit status, eligible date, and start date. Previous Benefit Activity includes status, past benefit activity (usage), reason stopped, and notes.

Benefit	Current Status	Eligible Date	Start Date	Past Benefit Activity	Reason Stopped	Notes
Dental	**Active**	01/02/2008	01/01/2008			
Dependent Care Spending Acct	**Active**	01/01/2008	01/02/2008			
Health Care Spending Account	**Active**	01/01/2008	01/02/2008			
Medical		01/01/2008		01/02/2008 to...	Terminated	

Figure 8-7

You can print this report for one employee or for all employees in a department. To print this report for a department, select the department button. Choose the department you want to print. Each employee will appear on a separate page. To print this report for all employees, select the department button and choose *-All Departments-*.

Employee Unused Benefit

This report lists all employees (by department) who are currently not enrolled in a particular benefit. The report will also show each employee's position, all unused benefits, and date eligible for each unused benefit. You can choose to report on one or all unused benefits.

Department - Employee	Position	Unused Benefit	Date Eligible
Administration			
Smith, Diane L	Management Consultant	Dependent Care Spending Acct	11/10/2007
		Profit Sharing	11/10/2008
		Stock Options	05/10/2008
		Tuition Reimbursement	05/10/2008
Smith, Thomas	Administratiive Assistant	401K	12/04/2007
		Dental	09/02/2007
		Dependent Care Spending Acct	06/04/2007
		Life Insurance	09/02/2007

Figure 8-8

Employees Not Using Benefits

This report is similar to the Employee Unused Benefit. This report displays information (by benefit) for each employee eligible for a benefit but not currently enrolled in the benefit. For each employee the report lists the employee's department, position, and eligible date. You can choose to report on a specific benefit or on all benefits.

Benefit - Employee	Department	Position	Eligible Date
401K			
Beck, Lucus	Application Programming	Programmer	07/02/2006
Epson, Sam	Application Programming	Programmer	06/01/2008
Parker, Joyce	Customer Support	Administratiive Assistant	01/08/2004
Smith, Thomas	Administration	Administratiive Assistant	12/04/2007
Wade, Hans	Mailroom	Clerk	10/14/2004
Dental			
Smith, Thomas	Administration	Administratiive Assistant	09/02/2007

Figure 8-9

Employees Using Each Benefit

This report displays each benefit used and all employees enrolled in that benefit. It also lists the employee's department, position, and the date enrolled for each benefit. You can choose to report on a specific benefit or on all benefits.

Benefit - Employee	Department	Position	Date Enrolled
401K			
Smith, Diane L	Administration	Management Consultant	11/10/2007
Dental			
Beck, Lucus	Application Programming	Programmer	01/01/2008
Smith, Diane L	Administration	Management Consultant	11/10/2007

Figure 8-10

Single Benefit History

This report displays history information about a specific benefit for an individual employee. Benefit data includes Date Enrolled, Stopped, Stop reason, and Notes.

Thomas, Joe - Department: Mailroom - Position: Administrative Assistant

401K

From	To	Stop Reason	Notes
2/7/2008	-present-		
11/7/2006	11/7/2007	Cant afford	

Figure 8-11

Education / Training History Reports

This report displays an employee's education and training. The header displays the employee name, position, and department. This report is divided into two sections, General Education and Additional Training.

General Education	Graduated	From	To	Degree	Major	Honors	G.P.A	Location
High School - Islip High School	06/20/1972	09/03/1968	06/20/1972		Computer ...			Islip, New York
Notes								
College - College of St. Elizabeth	05/30/1980	09/20/1975	05/30/1980	BS	Communications		4.0	Convent Station, NJ
Notes								
Graduate School - George Washington...	06/20/2000	03/20/1997	06/20/2000	Masters Of Science	Project ...			Washington, DC
Notes								

Additional Training	From	To	Instructor	Grade	Location
2008 Benefits Update	11/01/2007	11/01/2007	Scott Calvin	N/A	Hardy, VA
Notes 2008 Benefits Update Training					
Harrassment	11/20/2007		Harry Smith		Dover, DE
Notes Training requirement for all new employees and every two years thereafter.					

Figure 8-12

General Education includes elementary school through graduate school. For each school listed you will see the location of the school, the dates attended, date graduated, G.P.A, major, degree, and honors.

Additional Training usually consists of job related courses or training. Information displayed for additional training consists of training title, location of training, dates attended, grade, instructor's name, and any additional notes.

You can print this report for one employee or for all employees in a department. To print this report for a department, select the department button. Choose the department you want to print. Each employee will appear on a separate page. To print this report for all employees, select the department button and choose *-All Departments-*.

Employee Training Summary

This report displays all employees (by department) who have a training record. For each employee, the report will also display the employee's position, class attended, location of class, dates attended, and the grade they received.

Department - Employee	Position	Class	Location	Dates Attended	Grade
Administration					
Smith, Diane L	Management Consultant	Harrassment	Dover, DE	11/20/2007	
Smith, Thomas	Administrative Assistant	Harrassment	Dover, DE	11/20/2007	N/A
Customer Support					
Bush, Jane Cindy	Administrative Assistant	New Hire Orientation	Hardy, VA	11/30/2007 to 11/30/2007	N/A

Figure 8-13

Select the class from the *Training Classes* list. You can also select a date range for your report. If you choose a date range, then only training records between the *from* date and the *to* date will appear on the report. By default, the report will use *all dates*.

Training Attendance

The Training Attendance report displays all training classes that are currently in your *HR* database. All employees that have attended training classes are listed below each class along with their department, dates attended, and the grade they received.

Department - Employee	Position	Class	Location	Dates Attended	Grade
Administration					
Smith, Diane L	Management Consultant	Harrassment	Dover, DE	11/20/2007	
Smith, Thomas	Administrative Assistant	Harrassment	Dover, DE	11/20/2007	N/A
Customer Support					
Bush, Jane Cindy	Administrative Assistant	New Hire Orientation	Hardy, VA	11/30/2007 to 11/30/2007	N/A

Figure 8-14

Select the class from the *Training Classes* list. You can also select a date range for your report. If you choose a date range, then only training records between the *from* date and the *to* date will appear on the report. By default, the report will use *all dates*.

Training List

This report prints a list of employees attending Training. Training information includes, employee name, title, department, position, class date from, date to, location, instructor

Beck, Lucus - Programmer II - Department: Application Programming - Position: Programmer

Class	Date From	Date To	Location	Instructor	Grade
2008 Benefits Update	12/15/2007	12/15/2007	Hardy VA	Gary Jones	N/A

Bush, Jane Cindy - Administrative Assistant - Department: Customer Support - Position: Administrative Assistant

Class	Date From	Date To	Location	Instructor	Grade
2008 Benefits Update	11/01/2007	11/01/2007	Hardy, VA	Scott Calvin	N/A

Figure 8-15

Beck, Lucus - Programmer II - Department: Application Programming - Position: Programmer

Class	Date From	Date To	Location	Instructor	Grade
2008 Benefits Update	12/15/2007	12/15/2007	Hardy VA	Gary Jones	N/A

Bush, Jane Cindy - Administrative Assistant - Department: Customer Support - Position: Administrative Assistant

Class	Date From	Date To	Location	Instructor	Grade
2008 Benefits Update	11/01/2007	11/01/2007	Hardy, VA	Scott Calvin	N/A

Education List

This report lists employee's formal education. Education information includes employee name, title, department, position. Education level, date from, date to, school, location, degree, major, and honors.

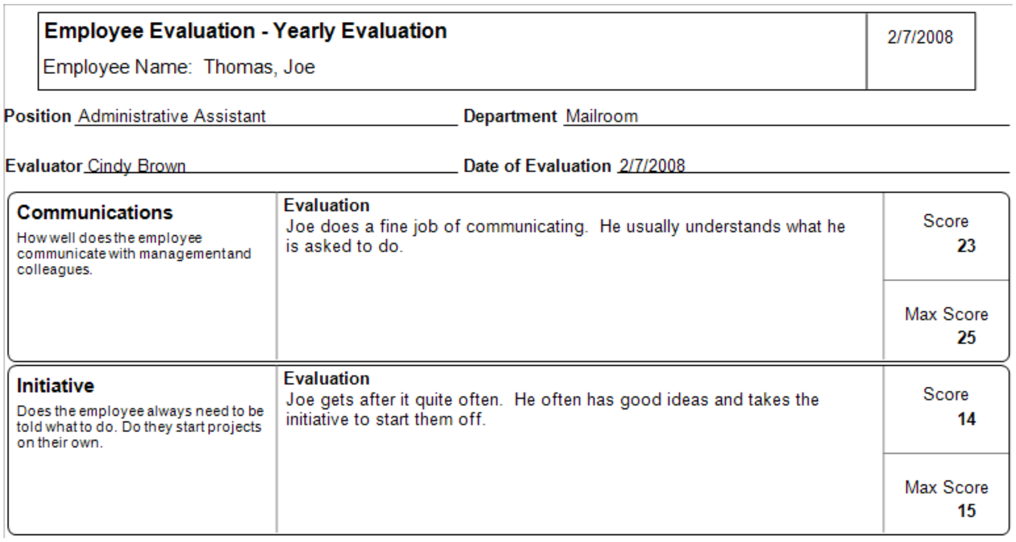
Smith, Thomas - Administrative Assistant - Department: Administration - Position: Administrative Assistant

Level	Date From	Date To	School	Location		
High School	09/13/1986	06/18/1989	Marana High School	Marana, AZ	**Degree**	BA in Science
					Major	MIS
					Honors	Valedictorian
College	09/14/1989	06/18/1994	University of Arizona	Tucson, AZ	**Degree**	BA in Medicine
					Major	Business Admin
					Honors	Summa Cum Laude

Figure 8-16

Employee Evaluation Reports

This report prints an evaluation for an employee. Evaluation information includes employee position, department, evaluator, and date of evaluation.



Employee Evaluation - Yearly Evaluation 2/7/2008

Employee Name: Thomas, Joe

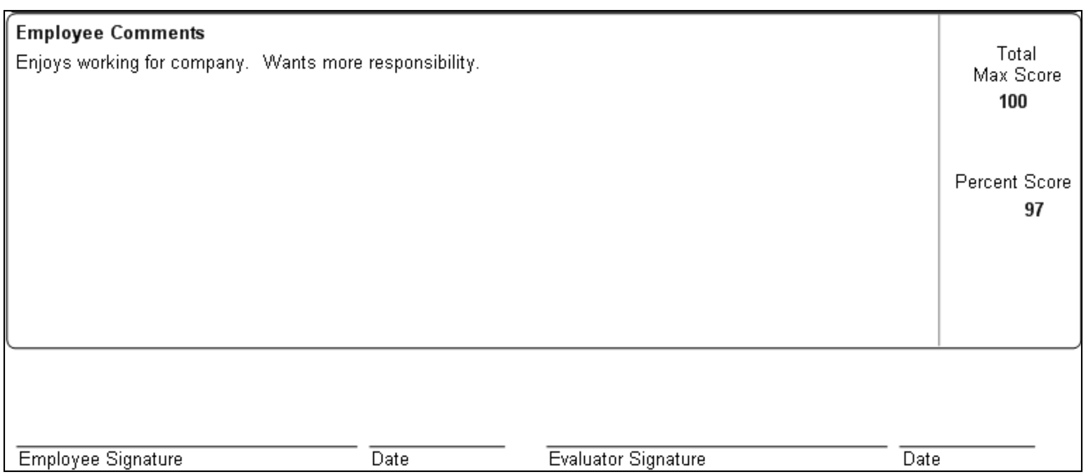
Position Administrative Assistant **Department** Mailroom

Evaluator Cindy Brown **Date of Evaluation** 2/7/2008

Communications How well does the employee communicate with management and colleagues.	**Evaluation** Joe does a fine job of communicating. He usually understands what he is asked to do.	Score **23** Max Score **25**
Initiative Does the employee always need to be told what to do. Do they start projects on their own.	**Evaluation** Joe gets after it quite often. He often has good ideas and takes the initiative to start them off.	Score **14** Max Score **15**

Figure 8-17

Scoring information includes actual score, max score, total max score, and percent score. There is also a section for Employee and Evaluator Comments.



Employee Comments

Enjoys working for company. Wants more responsibility.

Total Max Score **100**

Percent Score **97**

Employee Signature   Date   Evaluator Signature   Date

Figure 8-18

To print an evaluation, first select the employee name and then select the specific evaluation from the evaluation box.

To print a blank evaluation, check the *blank evaluation* checkbox and then select the evaluation type.

Evaluation Category Summary

This report lists all evaluation categories in *HR* with a description of each category.

Category	Description
Attendance	Punctualness
Communications	How well do they communicate
Decision Making	How well does employee make decisions.
Dependability/Responsibility	If the employee dependable and responsibility

Figure 8-19

Evaluation History

This report displays evaluation information for each employee who has received an evaluation. Information for each evaluation includes evaluation date, type, overall score, percentage, and evaluator. Additional information includes department and position. You can also print this report from an employee's Evaluation History screen.

Evaluation Date	Evaluation Type	Overall Score	Percentage	Evaluator
12/14/2007...	Exempt Performance Review	97 out of 100	97	Harry White

Figure 8-20

Evaluation Ratings

This report displays a ratings scale for your company. Information includes scoring description and scoring range.

Scoring Description	From	To
A	90	100
B	80	89
C	70	79
D	60	69
E	50	59
F	40	49
G	30	39
H	0	29

Figure 8-21

Evaluation Schedule

This report lists all employees who are due for an evaluation within a given time period. Information includes employee department, evaluation type, evaluator, score, and date of last evaluation.

Department - Employee	Evaluation Type	Evaluator	Score	Last Evaluation
Administration				
*Smith, Thomas				
Customer Support				
Brown, Cindy	Yearly Evaluation		85.0	10/4/2006
*Jones, Jeff				
Mailroom				
*Smith, Tom				
Maintenance				
Lane, Mark	Yearly Evaluation		94.0	11/20/2006

Figure 8-22

Employees who have never been evaluated are noted with an asterisk.

Evaluation Selection

This report displays all employees that have been evaluated. For each evaluation, the report shows the employee's department, position, the evaluation type, the evaluator, evaluation date, points received for evaluation, and percentage score.

You can also choose to report on a specific scoring range. *HR* allows you to choose *all scores*, *raw scores*, and *percentages*. Raw scores are a specific number out of a maximum (i.e. 120 out of a possible 160 points). Percentages are derived from the raw score (e.g. 80%).

You can print a report for a specific evaluation type or for all evaluation types. You can also choose an evaluation date range and an evaluation score range.

If you are using Alternate Scoring Codes (**Settings > Configuration**), then the Evaluation Selection Report lists all evaluations by evaluation scores.

Employee	Department	Position	Evaluation Type	Evaluator	Date	Raw Score	%
Smith, Diane L	Administration	Management Consultant	Exempt Performance Review	Harry White	12/14/2007	97 out of 100	97

Figure 8-23

General Reports

Certification List

This report lists all employees who have a certification. Information for each certification includes certification name, number, and expiration date.

Smith, Diane L - Consultant - Department: Administration - Position: Management Consultant

Certification Name	Certification Number	Expiration Date
MCSD	8667	12/31/2020

Smith, Thomas - Administrative Assistant - Department: Administration - Position: Administrative Assistant

Certification Name	Certification Number	Expiration Date
Engineer	11111	03/03/2009
MCSD	8667	-Unknown-
Old Certification	12345	06/20/2007
Old Certification	12345	06/20/2007

Figure 8-24

Employee Address History

The Address History report displays all past and present addresses for all employees. Address information includes street, city, state, zip, and date.

Smith, Thomas - Administrative Assistant - Department: Administration - Position: Administrative Assistant

From	To	Street	City	State	Zip
07/15/20...	07/27/20...	7555 N. Ethan Allan	Tucson	AZ	85741
07/11/20...	07/15/20...	27704 Haxton Dr.	Canyon Country	CA	91351
03/17/20...	07/11/20...	27702 Haxton Dr.	Canyon Country	CA	91351
02/17/20...	03/17/20...	27700 Haxton Dr.	Canyon Country	CA	91351
07/27/20...		2301 Berkley Ave.	Roanoke	VA	24015

Figure 8-25

Employee Information

The Employee Information report displays data from each of the 14 Employee File categories. You can select which categories to report on from the category list. Only the selected categories will report data.

General

Title	Administrative Assistant	Marital Status	Single
Position	Administrative Assistant	Former Name	
Hire Date	06/04/2007	Marriage Date	04/10/2004
EEO Code	Caucasian	Spouse Name	
Disability		Spouse SS#	
Sex	Male	Spouse DOB	
SS#	123-45-6789	Phone #1	
DOB		Phone #2	
Address	2301 Berkley Ave. Roanoke, VA 24015	Phone #3	
		E-Mail	

Employment

Department	Administration	Badge Number	
Supervisor		Emp. Number	
Status	Full Time	Payroll Number	
Location	Rochester	I-9 Doc Filed	NO
Compensation	$25,000.00 per year	Work Permit	
Military Status		Expires	
Union Name		Notes	
Union Number			

Figure 8-26

You can choose to report on one or multiple employees. To select more than one employee, check the *multiple employees'* checkbox. Selecting multiple employees allows you to use the selection criteria to decide which employees to print. If you do not choose any selection criteria, then Employee Information will report on all employees.

When previewing multiple employees, you will only be able to preview information for the first employee. You can also print a blank report using the *blank sheet* checkbox.

Employee Work History

The Employee Work History report displays complete employee work history records. Data includes employee name, department, position, supervisor, compensation, date range for each record, reason for record change from previous record, and job status.

Epson, Sam - Sr. Programmer Analyst

From	To	Department	Position	Supervisor	Compensation	Reason	Status	Location
12/01/2007	-present-	Application Programming	Programmer	P. Hodapp	$25.00 per hour		Full Time	Hardy, VA

Harris, Billie Bob

From	To	Department	Position	Supervisor	Compensation	Reason	Status	Location
01/03/2008	-present-	Maintenance	Custodian		$11.00 per hour		Part Time	Hardy, VA
11/14/2007	01/03/2008	Maintenance			$11.00 per hour			

Figure 8-27

You can also print an employee's work history record from Work Info.

Miscellaneous Information

This report displays the content of each employee's Other Information record. Information includes EEO code, disability, military status, payroll #, work permit data, I-9 data, union data, and general notes.

Beck, Lucus	
Marital Status:	
Former Name:	
Marriage Date:	
Spouse Name:	
Spouse SSN:	
Spouse DOB:	
EEO Code:	02 Black/Not Hispanic orgin
Disability:	None
Mil Status:	
Union Name:	AFL-CIO
Union #:	772450
WP Number:	95638
WP Expiration:	12/31/2008
I9:	Yes
I-9 Expiration:	12/31/2008
Parking...	
UDef #2:	
UDef #3:	
UDef #4:	
UDef #5:	
UDef #6:	
UDef #7:	
UDef #8:	

Figure 8-28

You can also print this report from an employee's Other Information screen.

Monthly List of Work Changes

This report displays changes in work history records for a specific month or an entire year. Work information includes employee name, reason for change, change date, job status, compensation, position, and department.

January 2008

Employee	Change Reason	Day	Compensation	Job Status	Position	Department
Beck, Lucus		2	$25.00 per hour	Full Time	Programmer	Application Programming
Parker, Joyce		2	$18.00 per hour	Full Time	Administratiive Assistant	Customer Support
Wade, Hans		2	$12.00 per hour	Full Time		Mailroom
Wade, Hans		2	$12.00 per hour	Full Time	Clerk	Mailroom
Bush, Jane Cindy		3	$20.00 per hour	Part Time	Administratiive Assistant	Customer Support
Harris, Billie Bob		3	$11.00 per hour	Part Time	Custodian	Maintenance

Figure 8-28

Select the month and year you want to view. If you want to print all months for a given year, select the year and make sure that the *print entire year* checkbox is marked.

Personal Information

This report displays Personal Information for all employees. Personal information includes employee name, date of birth, sex, SSN, phone numbers, email, marital status, former name, marriage date, and spouse information.

Bush, Jane Cindy		Harris, Billie Bob		Smith, Diane L	
Date of Birth:	12/07/1988	**Date of Birth:**	12/26/1974	**Date of Birth:**	01/13/1954
Date of Hire:	12/05/2007	**Date of Hire:**	11/14/2007	**Date of Hire:**	11/10/2007
Term Date:		**Term Date:**		**Term Date:**	
Department:	Customer Support	**Department:**	Maintenance	**Department:**	Administration
SSN:	997-45-7683	**SSN:**	887-23-6765	**SSN:**	122-34-6587
Sex:	Female	**Sex:**	Male	**Sex:**	Female
Phone #1:	(540) 721-1007	**Phone #1:**	(203) 876-9786	**Phone #1:**	(540) 842-9209
Phone #2:		**Phone #2:**		**Phone #2:**	
Phone #3:		**Phone #3:**		**Phone #3:**	
E-Mail:	janebush@softwaretech.com	**E-Mail:**	billiebob@softwaretech.com	**E-Mail:**	Diane@softwaretech.com
Employee #:	127883	**Employee #:**	99762	**Employee #:**	87591
Payroll #:	127883	**Payroll #:**	99762	**Payroll #:**	87591
Badge #:	127883	**Badge #:**	99762	**Badge #:**	87591
Compensation:	$20.00 per Hour	**Compensation:**	$11.00 per Hour	**Compensation:**	$80.00 per Hour
Employee Notes:		**Employee Notes:**		**Employee Notes:**	

Figure 8-29

You can also print an employee Personal Information report from Personal.

Quick List

Quick List is a simple report writer. It allows you to choose up to eight categories to report on. Use the drop down list box to select a category. You can choose from such categories as *position*, *department*, *position*, *job status*, *birth date*, *hire date*, *social security number*, *home phone*, *work phone*, fax, *e-mail*, and other *user defined* fields. You can also choose to have a column omit any data.

Name	Department	Position	Location	Phone #1	E-Mail
Beck, Lucus	Application Programming	Programmer	Hardy, VA	(540) 721-1000	Luc@softwaretech.com
Bush, Jane Cindy	Customer Support	Administratiive Assistant	Hardy, VA	(540) 721-1007	janebush@softwaretech.com
Epson, Sam	Application Programming	Programmer	Hardy, VA		
Harris, Billie Bob	Maintenance	Custodian	Hardy, VA	(203) 876-9786	billiebob@softwaretech.com
Parker, Joyce	Customer Support	Administratiive Assistant	Hardy, VA		Joyce
Smith, Diane L	Administration	Management Consultant	Hardy, VA	(540) 842-9209	Diane@softwaretech.com
Smith, Thomas	Administration	Administratiive Assistant	Rochester		
Wade, Hans	Mailroom	Clerk	Hardy, VA	(540) 721-1000	Hans@softwaretech.com

Figure 8-30

The above figure shows an example of a Quick List report using the Employee Directory template. Quick List comes with eight pre-defined templates.

> ***HR*** will not remember any changes you make to a template including *Report title* and *Column* selection, unless you save the template.

Union Directory

The Union Directory report lists all unions currently in your ***HR*** database as well as each employee in that union. Additional information includes employee title, position, department, and union number.

Union - Employee	Title	Position	Department	Union Number
AFL-CIO				
Beck, Lucus	Programmer II	Programmer	Application Programming	772450

Figure 8-31

Attachment List

The report shows all related attachments to an employee and includes the name of each attachment, the date the attachment was added to ***HR***, the filename of the attachment and a comments about the attchment.

Thomas, Joe - Department: Mailroom - Position: Programmer

Title	Date Entered	Location	Comments
Change of Address form	2/5/2008	C:\Change of Address.doc	Official Company change of Address form
Formal Warning	4/5/2007	C:\FORMAL WARNING (040507).DOC	This formal warning will be on Joe's record for 2 years.
W-2 form	3/4/2008		

Figure 8-32

Warning Reports

Department Warning Summary

This report lists all employees (by department) who have received a warning. Additional information includes employee position, warning type, and date of warning.

Warning - Employee	Department	Position	Date
Verbal			
Beck, Lucus	Application Programming	Programmer	11/16/2007
Written			
Smith, Diane L	Administration	Management Consultant	11/10/2007
Smith, Thomas	Administration	Administratiive Assistant	06/14/2007

Figure 8-33

You can select a specific type of warning to view. Select the warning from the **warning type** list.

Formal Warning

This report prints a formal warning for an individual employee. Each warning includes the employee's department, position, job status, the person who issued the warning, and the date the warning was given. Each Formal Warning also includes the details of the infraction, any action taken, and employee comments.

Department	Mailroom
Position	Administrative Assistant
Job Status	Full Time
Issued By	Thomas Smith
Warning Date	4/5/2007

Details of Infraction
Bill was late again coming in to work.

Action Taken
Bill was warned back in January. This will be a formal write-up. Further infractions will result in more discipline.

Employee Comments
My wife was sick.

Figure 8-34

You can also print an employee Formal Warning report the Warning Details screen.

Choose the employee from the Employee Names list. Select the specific warning you want to print from the warning list. To print a blank warning, check the Blank Warning checkbox.

Warning History

This report displays warning information for each employee warned. Warning information includes date, type, and name of issuer.

Smith, Diane L - Consultant - Department: Administration - Position: Management Consultant

Warning Date	Warning Type	Issued by
11/10/2007	Written	Kara Suller

Smith, Thomas - Cook - Department: Administration - Position: Administratiive Assistant

Warning Date	Warning Type	Issued by
06/14/2007	Written	
06/13/2007		Gary Mohnsen

Figure 8-35

You can also print an employee Warning History report from an employee’s Warning screen.

Warning Summary

This report lists all employees who have received a warning by the type of warning received. Additional information includes employee department, position, and warning date.

You can select a specific type of warning to view. Select the warning from the warning type list.

Department - Employee	Position	Warning	Date
Administration			
Smith, Diane L	Management Consultant	Written	11/10/2007
Smith, Thomas	Administratiive Assistant		06/13/2007
		Written	06/14/2007

Figure 8-36

Chapter 9 Organization Reports

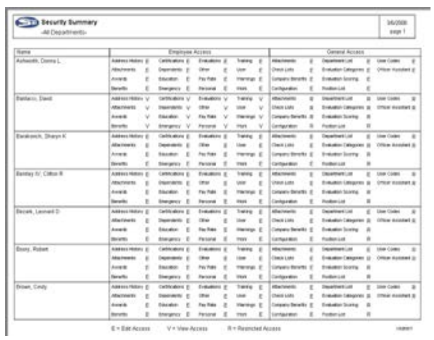
HR has six categories of Organization Reports. Each report will be explained in detail, grouped by category, with an example of each report.

To access the reports, click **Reports->Organization Reports** on the toolbar. Select the category of the report you want to view from the drop down list box. Each report available for that specific category will appear.

Administration Reports

Security Summary

This report lists *HR* users and their access levels.



Security List

This report lists all *HR* users and the departments they can access. You can also print this report from the Security screen.

Employee	Access	Departments
Beck, Lucus	Employee Access	-Employee Access-
Bush, Jane Cindy	Employee Access	-Employee Access-
Epson, Sam	Employee Access	-Employee Access-
Harris, Billie Bob	Employee Access	-Employee Access-
Parker, Joyce	Employee Access	-Employee Access-
Smith, Diane L	Employee Access	-Employee Access-
Smith, Thomas	Super Administrator	-All Departments-
Wade, Hans	Employee Access	-Employee Access-

Figure 9-1

User Code List

This report lists all user options for the 22 user code categories.

Award Type
Operations Award
Employee of the Year
Employee Of The Day
Presidents Award
Outstanding Employee
Community Service Award
Suggestion Award
Invention Award
Goal Achievement
Retention Award
Length Of Service Award

Benefit - Reason Stopped
Terminated
Too costly

Certification
New Certification
Old Certification
Engineer
MCSD

Education - Honor
Valedictorian
Summa Cum Laude

Education - Major
MIS
Business Admin
Computer Programmer
Communications
Project Management

EEO Category
Apprentice
Craftworkers
Laborers
Office/Clerical Workers
Officials and Managers
Operatives
Professionals
Sales Workers
Service Workers
Technicians
Executive/Sr Level Officers/Ma

Figure 9-2

You can also print this report from the User Codes screen.

User Code Report

This report lists all employees currently assigned a particular user option. First select the user code category from the category list and then select the user option from the list box entry. The header displays the user option information. Figure 9-3 shows all instances of Job Status Code type matching “Full Time”.

User Code Report
All instances of Job Status Code matching Full Time

Job Status Code
Thomas, Joe

Figure 9-3

Vital Data Omitted

This report lists all employees who have vital data missing from the database. Vital data includes first name, hire date, department, position, job status, social security number, current salary, phone number, emergency information, and current address.

Employee	First Name	Hire Date	Department	Position	Job Status	Social Security Number	Current Pay	Phone Number	Emergency Information	Current Address
Beck, Lucus									X	X
Bush, Jane Cindy									X	X
Epson, Sam						X		X	X	X
Harris, Billie Bob									X	X
Parker, Joyce								X		X
Smith, Thomas								X	X	
Wade, Hans									X	X

Figure 9-4

Compensation Reports

Department Salary Profile

This report displays company salary information by department. Information for each department includes the number of employees and the total amount of salaries paid to that department. Other information includes percent of midpoint, actual salary, and planned salary. You can print this report for one or multiple departments.

				Actual			Planned		
Department	Count	Total Salary	% of MidPt	Minimum Salary	Average Salary	Maximum Salary	Minimum	Midpoint	Maximum
Administration	1	44,000.00	146.66	44,000.00	44,000.00	44,000.00	20,000.00	30,000.00	40,000.00
Customer Support	2	36,000.00	92.30	16,000.00	18,000.00	20,000.00	15,000.00	19,500.00	24,000.00
Mailroom	2	71,000.00	109.23	21,000.00	35,500.00	50,000.00	20,000.00	32,500.00	45,000.00
Maintenance	1	25,000.00	113.63	25,000.00	25,000.00	25,000.00	21,000.00	22,000.00	24,000.00
	6	176,000.00	112.82	16,000.00	29,333.33	50,000.00	15,000.00	26,000.00	45,000.00

Figure 9-5

Actual salary figures are based upon employees' salaries in that department. The minimum department salary is the lowest actual amount that an employee in the department receives. The maximum department salary is the highest actual amount that an employee in the department receives. The average salary is the average salary for all employees in the department.

Planned salary consists of a calculated minimum, maximum, and midpoint. These figures are based upon the amounts specified in **Positions** and the number of employees in each department. The minimum salary is the lowest amount specified for a position in the department. The maximum salary is the highest amount specified for a position in the department. The midpoint is calculated from the planned midpoint salaries of each employee in the department.

Example

The Applications Programming department has 2 employees. The planned midpoint is 49,045. The total midpoint for all two employees would be $98k. The planned midpoint for the Application Programming would be $98k divided by the 2 employees, or $49k.

The percent of midpoint amount is calculated from the actual average salary divided by the planned midpoint.

Employee Compensation Status

The Employee Compensation Status report displays each employee's salary information. This includes current salary, amount of previous salary, date current salary became effective, and reason for salary change. The report also shows date of last evaluation, percent of midpoint, position, and department. The percent of midpoint is calculated from the employee's current salary divided by the position's planned midpoint.

	Last Salary Change							
Employee	Date	Amount	Reason	Current Salary	Last Evaluation	% of Midpoint	*Position	Department
Beck, Lucus	01/02/20...	-43,680.00		72,800.00		****.**	Programmer	Application Programming
Bush, Jane Cindy	01/03/20...	0.00		58,240.00		121.21	Administrative Assistant	Customer Support
Cooper, Shaun T	12/13/20...	0.00	Terminated	0.00		0.00	<Unassigned>	<Unassigned>
Epson, Sam	12/01/20...	72,800.00		72,800.00		****.**	Programmer	Application Programming
Harris, Billie Bob	01/03/20...	0.00		32,032.00		88.00	Custodian	Maintenance
Parker, Joyce	01/02/20...	0.00		52,416.00		109.09	Administrative Assistant	Customer Support

Figure 9-5

You can choose which employees to print by selecting one or more departments or positions. To show only the employees who have not been evaluated since a specific date, select *exclude recent evaluations*.

The *sort order* box allows you to choose the order of the records. By default, the records will be sorted first by name, and then by evaluation date, position, and department. To change the sort order, click the field you want to move, hold the left mouse button down and drag it to its new position. For example, if you want to first sort the records by department, you would click *department* and drag it to the *name* field position.

Employee Over / Under Budget

This report shows all employees whose current salary is either lower than their position's planned minimum or higher than their position's planned maximum. If a salary is below the position's minimum, the report will display the percentage under the minimum. If a salary is above the position's maximum, the report will display the percentage above the maximum. (The positions table specifies the position minimum, and maximum.)

Employee Name	Department	Position	Salary	Minimum	% Under Min.	Maximum	% Above Max.
Lane, Mark	Maintenance	Custodian	25,000.00			24,000.00	4.16
Smith, Thomas	Administration	Management Consultant	44,000.00			40,000.00	10.00
Thomas, Joe	Mailroom	Programmer	50,000.00			45,000.00	11.11
Jones, Jeff	Customer Support	Custodian	20,000.00	21,000.00	-4.76		

Figure 9-6

Employee Salary Profile

This report displays each employee's name, position, current salary, and the relationship between their salary and their position's planned salary. The percent of midpoint is calculated from the employee's current salary divided by the position's planned midpoint. Additional information includes planned minimum, midpoint, and maximum salary.

Employee	Department	Position	Salary	% of Midpoint	Relationship To Salary Schedule				Position Minimum	Position Midpoint	Position Maximum
Smith, Thomas	Administration	Management Consultant	44,000.00	146.67				●	20,000.00	30,000.00	40,000.00
Brown, Cindy	Customer Support	Administrative Assistant	16,000.00	94.12		●			15,000.00	17,000.00	20,000.00
Jones, Jeff	Customer Support	Custodian	20,000.00	90.91	●				21,000.00	22,000.00	24,000.00
Smith, Tom	Mailroom	Management Consultant	21,000.00	70.00		●			20,000.00	30,000.00	40,000.00
Thomas, Joe	Mailroom	Programmer	50,000.00	142.86				●	25,000.00	35,000.00	45,000.00
Lane, Mark	Maintenance	Custodian	25,000.00	113.64				●	21,000.00	22,000.00	24,000.00
			176,000.00	392.30					15,000.00	26,000.00	45,000.00

Figure 9-7

Relationship to Salary Schedule shows how an employee's salary relates to the position's planned salary. The first column signifies all employees whose salary is less than the position's planned minimum. The second column shows all employees whose salary falls between the position's planned minimum and midpoint. The third column shows all employees whose salary falls between the position's midpoint and maximum. The last column shows all employees whose salary is more than the position's planned maximum. Any employee whose salary is equal to the position's planned amount will not appear in the relationship table and the corresponding position amount will be shaded in yellow.

Position Salary Profile

This report (similar to Department Salary Profile) displays salary information for each position. Information includes position name, number of employees in each position (count), total salaries paid to employees in that position, and the minimum, average, and maximum actual salaries paid. You can print this report for one or multiple positions.

				Actual			Planned		
Position	Count	Total Salary	% of MidPt	Minimum Salary	Average Salary	Maximum Salary	Minimum for position	Midpoint for position	Maximum for position
Administrative Assistant	3	104,040.00	101.05	25,000.00	34,680.00	41,600.00	27,040.00	34,320.00	41,600.00
Clerk	1	24,960.00	104.35	24,960.00	24,960.00	24,960.00	16,640.00	23,920.00	31,200.00
Custodian	1	22,880.00	88.00	22,880.00	22,880.00	22,880.00	20,800.00	26,000.00	31,200.00
Management Consultant	1	135,200.00	43.33	135,200.00	135,200.00	135,200.00	208,000.00	312,000.00	416,000.00
Programmer	2	104,000.00	106.03	52,000.00	52,000.00	52,000.00	36,632.00	49,045.00	60,458.00
	8	391,080.00	69.46	22,880.00	48,885.00	135,200.00	16,640.00	70,371.25	416,000.00

Figure 9-8

Actual salary consists of a minimum, average, and maximum amount. The minimum is the lowest amount an employee in that position receives. The maximum is the highest amount an employee in that position receives. The average is determined from all of the employees in that position and their actual salaries.

Planned salary figures are based upon the amounts specified in Positions. The percent of midpoint is calculated from the position's actual salary average divided by the planned midpoint.

Salary Planning Worksheet

The purpose of this worksheet is to help you project future salaries. The first three columns show the actual data for each department, including number of employees in each position, actual average salary, and total salaries. The second group of columns displays planned information for each position including actual number of employees in each position, planned midpoint, and current budget for the position. The current budget is calculated from the number of employees in the position times the planned midpoint.

The last group of columns is a worksheet for you to complete. It is similar to the previous two columns. You can also add additional positions and projected data in this worksheet.

Position	Headcount	Actual Average Salary	Current Total Salaries	Headcount	Planned Midpoint for position	Current Budget for position	Projected Headcount	Projected Average Salary	Projected Budget
Administrative Assistant	3 x	34,680.00 =	104,040.00	3 x	34,320.00 =	102,960.00	x	=	
Clerk	1 x	24,960.00 =	24,960.00	1 x	23,920.00 =	23,920.00	x	=	
Custodian	1 x	22,880.00 =	22,880.00	1 x	26,000.00 =	26,000.00	x	=	
Management Consultant	1 x	135,200.00 =	135,200.00	1 x	312,000.00 =	312,000.00	x	=	
Programmer	2 x	52,000.00 =	104,000.00	2 x	49,045.00 =	98,090.00	x	=	
	8 x	48,885.00 =	391,080.00	8 x	70,371.25 =	562,970.00			
			Additional Position				x	=	
			Additional Position				x	=	
			Additional Position				x	=	
			Additional Position				x	=	

Figure 9-8

Summary of Salary Changes

This report is similar to the Employee Compensation Status report. It lists salary information for each employee including current and previous salary amounts for a particular date range. It also lists the reason for and amount of each salary change. Additional information includes date of salary change, reason, employee's department, position, supervisor, and total compensation changes for the date range specified.

Employee	Department	Salary Change Date	Salary Change Amount	Reason	New Salary	Position	Job Status	Supervisor
Brown, Cindy	Customer Support	2/7/2008	16,000.00		16,000.00	Administrative...		
Brown, Cindy	Customer Support	2/7/2008	0.00		0.00	Administrative...		
Jones, Jeff	Customer Support	2/7/2008	20,000.00		20,000.00	Custodian		
Jones, Jeff	Customer Support	2/7/2008	0.00		0.00	Custodian		
Lane, Mark	Maintenance	2/7/2008	25,000.00		25,000.00	Custodian		
Lane, Mark	Maintenance	2/7/2008	0.00		0.00	Custodian		
Smith, Thomas	Administration	2/7/2008	2,000.00	Promotion	46,000.00	Management...		
Smith, Thomas	Administration	2/7/2008	0.00		44,000.00	Management...		
Smith, Tom	Mailroom	2/7/2008	21,000.00		21,000.00	Management...		
Smith, Tom	Mailroom	2/7/2008	0.00		0.00	Management...		
Thomas, Joe	Mailroom	2/7/2008	18,056.00	Merge Position	53,000.00	Programmer	Full Time	Cindy Brown
Thomas, Joe	Mailroom	2/7/2008	0.00		34,944.00	Programmer	Full Time	Cindy Brown
Thomas, Joe	Mailroom	2/7/2008	15,056.00		50,000.00	Programmer	Full Time	Cindy Brown
Thomas, Joe	Mailroom	2/6/2008	32,032.00		32,032.00	Programmer	Full Time	Cindy Brown
Brown, Cindy	Customer Support	1/2/2004	0.00		0.00	Administrative...		
Jones, Jeff	Customer Support	1/2/2004	0.00		0.00	Custodian		
Lane, Mark	Maintenance	1/2/2004	0.00		0.00	Custodian		
Smith, Thomas	Administration	1/2/2004	0.00		0.00	Management...		
Smith, Tom	Mailroom	1/2/2004	0.00		0.00	Management...		

Figure 9-9

Years of Service Profile

This report displays information based on length of employee service. You can choose the row category and cell data you want to display. Row categories include employee name, position, title, and department. Cell data includes salary average, headcount, and percentage.

Salary Average								
Department	**Under 1**	**1 - 2**	**3 - 4**	**5 - 9**	**10 - 14**	**15 - 19**	**20 +**	
Brown, Cindy			16,000.00					
Jones, Jeff			20,000.00					
Lane, Mark			25,000.00					
Smith, Thomas			46,000.00					
Smith, Tom			21,000.00					
Thomas, Joe	53,000.00							

Figure 9-10

Head Count Reports

Headcount Summary

This report lists the number of employees per job status in each department and position. It also displays the total number of employees in each department and position as well as a summary for your entire company with job status totals.

Department	Status	Head Count
Administration	Full Time	1
	Temporary	1
		subtotal 2
Application Programming	Full Time	2
		subtotal 2
Customer Support	Full Time	1
	Part Time	1
		subtotal 2
Mailroom	Full Time	1
		subtotal 1
Maintenance	Part Time	1
		subtotal 1
		total 8

Figure 9-11

Position	Status	Head Count
<Unassigned>	Terminated	1
		subtotal 1
Administrative Assistant	Full Time	2
	Part Time	1
		subtotal 3
Clerk	Full Time	1
		subtotal 1
Custodian	Part Time	1
		subtotal 1
Management Consultant	Temporary	1
		subtotal 1
Programmer	Full Time	2
		subtotal 2
		total 9

Figure 9-12

Status Summary	Head Count
Full Time	5
Part Time	2
Temporary	1
Terminated	1
	total 9

Figure 9-12

You can choose to print data for a specific job status. Select the **Summarize for only one job status** button. A drop down box will appear. Select the job status you want to display.

Monthly List of New Hires

This report displays new employee information for a particular month or an entire year by department. Employee Information includes name, date of hire, title, position, job status, supervisor, and compensation.

Administration	Hired	Title	Position	Job Status	Supervisor	Compensation
June						
Smith, Thomas	06/04/2007...	Administrative...	Administrative Assistant	Full Time		$25,000.00 per year
November						
Smith, Diane L	11/10/2007...	Consultant	Management Consultant	Temporary	John Parker	$80.00 per hour
Application Programming	**Hired**	**Title**	**Position**	**Job Status**	**Supervisor**	**Compensation**
December						
Epson, Sam	12/01/2007...	Sr. Programmer...	Programmer	Full Time	P. Hodapp	$25.00 per hour
Customer Support	**Hired**	**Title**	**Position**	**Job Status**	**Supervisor**	**Compensation**
December						
Bush, Jane Cindy	12/05/2007...	Administrative...	Administrative Assistant	Part Time		$20.00 per hour
Maintenance	**Hired**	**Title**	**Position**	**Job Status**	**Supervisor**	**Compensation**
November						
Harris, Billie Bob	11/14/2007...		Custodian	Part Time		$11.00 per hour

Figure 9-7

Monthly List of Terminations

This report displays terminated employee information for a particular month or an entire year. Employee Information includes name, social security number, last position, last department, last supervisor, last compensation, and termination date.

December

Employee	Soc Sec	Last Position	Last Department	Last Supervisor	Last Compensation	Terminated
Cooper, Shaun T	885-38-2536		Customer Support		$12.00 per hour	12/13/2007

Figure 9-15

Previously Held Positions

This report lists all of the employees that were previously in a particular position. This report includes date range information, previous department, previous supervisor, current position of employee, and current department.

Employee	Data for previously held position: Management Consultant			Current Position	Current Department
	From - To	Department	Supervisor		
Smith, Thomas	2/8/2008 - 2/8/2008	Administration		Programmer	Administration
	2/7/2008 - 2/8/2008	Administration			

Figure 9-16

User Defined Categories

This report displays *user defined field* information for each employee (see User Codes).

Smith, Diane L - Consultant - Department: Administration - Position: Management Consultant			
Parking Space	UDef #2	UDef #3	UDef #4
7A			
UDef #5	UDef #6	UDef #7	UDef #8

Figure 9-17

You can also print an employee User Defined Categories report from the Employee Files - User category.

Legal Reports

Certification by Employee

The Certification by Employee report lists all company certifications (by department) that will expire within a specified date range. Information includes employee name, position, title, and certification type, certification number, and expiration date.

Department - Employee	Position	Title	Certification Type	Certification Number	Expiration Date
Administration					
Smith, Diane L	Management Consultant	Consultant	MCSD	8667	12/31/2020
Smith, Thomas	Administrative Assistant	Administrative Assistant	Engineer	11111	03/03/2009
			MCSD	8667	-Unknown-
			Old Certification	12345	06/20/2007
			Old Certification	12345	06/20/2007

Figure 9-18

You can choose to print information for a particular certification or for all certifications. You can also specify an expiration date range or print all certifications.

Certification Renewal

This report lists employee information by certification type. Employee information includes name, department, position, title, certification number, and expiration date.

Certification Type - Employee	Department	Position	Title	Certification Number	Expires
Engineer					
Smith, Thomas	Administration	Administrative Assistant	Administrative Assistant	11111	03/03/2009
MCSD					
Smith, Diane L	Administration	Management Consultant	Consultant	8667	12/31/2020
Smith, Thomas	Administration	Administrative Assistant	Administrative Assistant	8667	-Unknown-
Old Certification					
Smith, Thomas	Administration	Administrative Assistant	Administrative Assistant	12345	06/20/2007
Smith, Thomas	Administration	Administrative Assistant	Administrative Assistant	12345	06/20/2007

Figure 9-19

You can choose to print information for a particular certification or for all certifications. You can also specify an expiration date range or print all certifications.

EEO Age Group Analysis

This report shows the number of employees in each age group for each position. It also lists position and age group totals. Age groups include under 21, 21-30, 31-40, 41-50, 51-60, 61-65, over 65, and unlisted.

Position	Age								Total
	<21	21-30	31-40	41-50	51-60	61-65	>65	unlisted	
<Unassigned>	0	1	0	0	0	0	0	0	1
Administrative Assistant	1	1	0	0	0	0	0	1	3
Clerk	0	0	1	0	0	0	0	0	1
Custodian	0	0	1	0	0	0	0	0	1
Management Consultant	0	0	0	0	1	0	0	0	1
Programmer	0	0	1	0	0	0	0	1	2
Total	1	2	3	0	1	0	0	2	9

Figure 9-20

EEO Breakdown

This report lists the total number of employees by EEO code, age group, sex, disability, and military status. Statistics include totals for each category.

EEO Codes	Head Count
-Unassigned-	5
01 White/Not Hispanic orgin	1
02 Black/Not Hispanic orgin	1
Caucasian	1
Total =	8

Age	Head Count
-Unknown-	2
20 and below	1
21 - 30	1
31 - 40	3
51 - 60	1
Total =	8

Sex	Head Count
-Unassigned-	1
Female	3
Male	4
Total =	8

Miltary Status	Head Count
-Unassigned-	8
Total =	8

Disability	Head Count
-Unassigned-	6
None	2
Total =	8

Figure 9-22

EEO Promotions

This report lists the EEO category of employees receiving a promotion. A promotion is any work change that includes a reason change of “promotion”. Information includes employee's social security number, sex, EEO class, new position, and promotion date.

You can print information for a specified date range or for all dates.

Employee	Department	SSN	Sex	EEO Class	Position	Promotion Date
Smith, Thomas	Administration	123-45-6789	M	Caucasian	Administrative Assistant	01/03/2008
					Administratiive Assistant	01/03/2008
					Administratiive Assistant	12/04/2007
					Administration	07/27/2007

Figure 9-23

Employee Work Force Analysis

This report displays EEO statistics for each position. Information includes EEO class name, number of males, number of females, and unclassified per EEO class. Additional information includes percent of males, females, and unclassified per position.

<Unassigned>

EEO Class	Male	%*	Female	%*	-Unclassified-	%*	Total
01 White/Not Hispanic orgin	1	100.0					1
Position Totals	1	100.0					1

Administrative Assistant

EEO Class	Male	%*	Female	%*	-Unclassified-	%*	Total
01 White/Not Hispanic orgin	1	33.3	1	33.3			2
02 Black/Not Hispanic orgin			1	33.3			1
Position Totals	1	33.3	2	66.7			3

Clerk

EEO Class	Male	%*	Female	%*	-Unclassified-	%*	Total
01 White/Not Hispanic orgin	1	100.0					1
Position Totals	1	100.0					1

Custodian

EEO Class	Male	%*	Female	%*	-Unclassified-	%*	Total
01 White/Not Hispanic orgin	1	100.0					1
Position Totals	1	100.0					1

Management Consultant

EEO Class	Male	%*	Female	%*	-Unclassified-	%*	Total
04 Asian or Pacific Islander			1	100.0			1
Position Totals			1	100.0			1

Figure 9-23

I-9 Report

This report lists all employees who have filed I-9 information. Data includes SSN, department, position, title, hire date, and I-9 filing date.

Employee	SSN	Department	Position	Title	Hire Date	Filing Date
Smith, Diane L	122-34-6587	Administration	Management Consultant	Consultant	11/10/2007	No date...
Beck, Lucus	774-09-3764	Application Programming	Programmer	Programmer II	01/02/2006	12/31/2008

Figure 9-24

New Hire Detail Report

This report lists all employees by position and date hired. Additional information includes department, EEO code, sex, social security number, position, and compensation. You can print information for a specified date range or for all dates.

Position - Employee	Date	Department	EEO Code	Sex	SSN	Position	Compensation
<Unassigned>							
Cooper, Shaun T	12/05/2007	<Unassigned>	01 White/Not...	Male	885-38-2536	<Unassigned>	
Administrative Assistant							
Bush, Jane Cindy	12/05/2007	Customer Support	01 White/Not...	Female	997-45-7683	Administrative Assistant	20.00 (Hourly)
Parker, Joyce	07/08/2003	Customer Support	02 Black/Not Hispanic...	Female	551-34-7643	Administrative Assistant	18.00 (Hourly)
Smith, Thomas	06/04/2007	Administration	01 White/Not...	Male	123-45-6789	Administrative Assistant	25000.00 (Annually)
Clerk							
Wade, Hans	04/14/2004	Mailroom	01 White/Not...	Male	997-21-3465	Clerk	12.00 (Hourly)
Custodian							
Harris, Billie Bob	11/14/2007	Maintenance	01 White/Not...	Male	887-23-6765	Custodian	11.00 (Hourly)
Management Consultant							
Smith, Diane L	11/10/2007	Administration	04 Asian or Pacific...	Female	122-34-6587	Management Consultant	75.00 (Hourly)
Programmer							
Beck, Lucus	01/02/2006	Application Programming	02 Black/Not Hispanic...	Male	774-09-3764	Programmer	25.00 (Hourly)
Epson, Sam	12/01/2007	Application Programming				Programmer	25.00 (Hourly)

Figure 9-25

Veterans Employment: VETS-100

This report lists the number of disabled veterans and Vietnam era veterans for each position as well as totals for the entire company.

Position	Disabled Veterans	Vietnam Era Veterans	Other Eligible Veterans
Administrative Assistant	0	0	0
Clerk	0	0	0
Custodian	0	0	0
Management Consultant	0	0	0
Programmer	0	0	0
Total	0	0	0

Figure 9-26

Work Permit Renewal Status

This report lists all employees with a work permit. Information includes work permit number, expiration date, permit status, social security number, department, position title, and date of hire.

Employee	SSN	Department	Position	Date	Number	Expires	Permit Status
Beck, Lucus	774-09-3764	Application Programming	Programmer	01/02/2006	95638	12/31/2008...	OK

Figure 9-27

Organization Reports

Check List

This report allows you to select a checklist to print. Information on the list includes task, complete checkbox, date field, and initials field.

Task		Date	Initials
Required Identification Forms	☐		
Employee Handbook	☐		
Employee and Intellectual Property Agreement (Signed)	☐		
Employment and Salary Offering Letter	☐		
Employment Application Disclaimer ("At will") (Signed)	☐		
Employee Handbook Acknowledgement Form (Signed)	☐		
Employment Eligibility Verification (I-9) Form	☐		
Federal Witholding Allowance (W-4) Form	☐		
Applicable State Withholding Form	☐		
Background Check Release Form (Signed)	☐		
Emergency Information Contact Form	☐		
Organizational Policy Review	☐		
Job Description	☐		
Benefits Overview Package	☐		
Payroll Calendar	☐		

Figure 9-28

You can also print a checklist from the Check Lists screen.

Department Heads

The Department Heads report lists the department manager, assistant, department notes, and headcount for each department.

Department Name	Manager	Assistant	Notes	HdCnt
Administration	Carol Manuel	Kay Fine		2
Application Programming	John Smith	Mary Moore	Programming Department	2
Customer Support	Hubie Clark			2
Mailroom				1
Maintenance			Custodial	1

Figure 9-29

You can also access this report from the Department screen.

Department Roster

This report displays employment information for each department. Information includes department head, department assistant, employee name, headcount, and compensation. Data for each employee includes title, position, job status, compensation, and supervisor.

Department: Administration

Department Head: Jeff Jones (Assistant: Mark Lane)

Employee	Title	Position	Job Status	Compensation	Supervisor
Smith, Thomas		Programmer		46,000.00 per year	
Headcount 1			**Total**	46,000.00	

Department: Customer Support

Employee	Title	Position	Job Status	Compensation	Supervisor
Brown, Cindy		Administrative Assistant		16,000.00 per year	
Jones, Jeff		Custodian		20,000.00 per year	
Headcount 2			**Total**	36,000.00	

Department: Mailroom

Employee	Title	Position	Job Status	Compensation	Supervisor
Smith, Tom		Management Consultant		21,000.00 per year	
Thomas, Joe		Programmer	Full Time	53,000.00 per year	Cindy Brown
Headcount 2			**Total**	74,000.00	

Department: Maintenance

Employee	Title	Position	Job Status	Compensation	Supervisor
Lane, Mark		Custodian		25,000.00 per year	
Headcount 1			**Total**	25,000.00	

Figure 9-30

Phone Directory (Condensed)

This report lists all employees alphabetically with their home telephone numbers. (See also Phone Directory report later in this chapter.)

B

Beck, Lucus	(540) 721-1000
Bush, Jane Cindy	(540) 721-1007

E

Epson, Sam	

H

Harris, Billie Bob	(203) 876-9786

P

Parker, Joyce	

S

Smith, Diane L	(540) 842-9209
Smith, Thomas	

W

Wade, Hans	(540) 721-1000

Figure 9-31

Position List

This report displays the salary information for each position including minimum, midpoint, maximum, pay rate and exempt status. Additional information includes position description.

Position Description	Minimum	Midpoint	Maximum	Pay Rate	Exempt	EEO Category	Job Description
Administrative Assistant	13.00	16.50	20.00	Hourly	No	Admistrative Support Worker	This area is used to define what the postion is responsible for, ei: Plans, directs, coordinates administrive services within a department.
Clerk	8.00	11.50	15.00	Hourly	No	Office/Clerical Workers	
Custodian	10.00	12.50	15.00	Hourly	No	Service Workers	Custodian
Management Consultant	100.00	150.00	200.00	Hourly	No	Professionals	A person who is engaged in providing and service, in connection with the management of the organization, who gives advice, technical assistant as it relates to the assignment
Programmer	0.00	0.00	0.00		Yes		Applications Programmer

Figure 9-32

You can also access this report from the Positions screen.

Position Roster

This report displays employment information for each position. Information includes names and number of employees assigned to position and total compensation. Data for each employee includes title, department, job status, compensation, and supervisor.

Administrative Assistant

Employee	Title	Department	Job Status	Compensation	Supervisor
Brown, Cindy		Customer Support		16,000.00 per year	
Headcount 1			**Total**	16,000.00	

Custodian

Employee	Title	Department	Job Status	Compensation	Supervisor
Jones, Jeff		Customer Support		20,000.00 per year	
Lane, Mark		Maintenance		25,000.00 per year	
Headcount 2			**Total**	45,000.00	

Management Consultant

Employee	Title	Department	Job Status	Compensation	Supervisor
Smith, Tom		Mailroom		21,000.00 per year	
Headcount 1			**Total**	21,000.00	

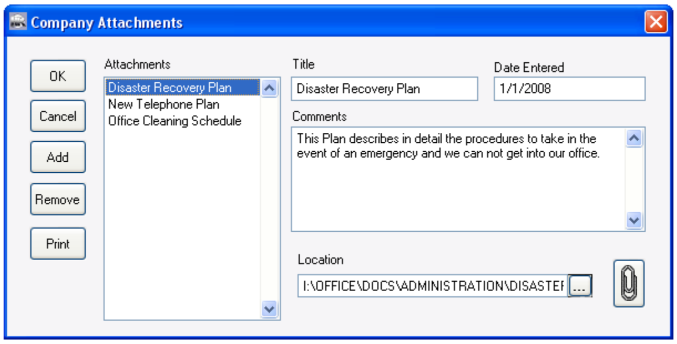
Programmer

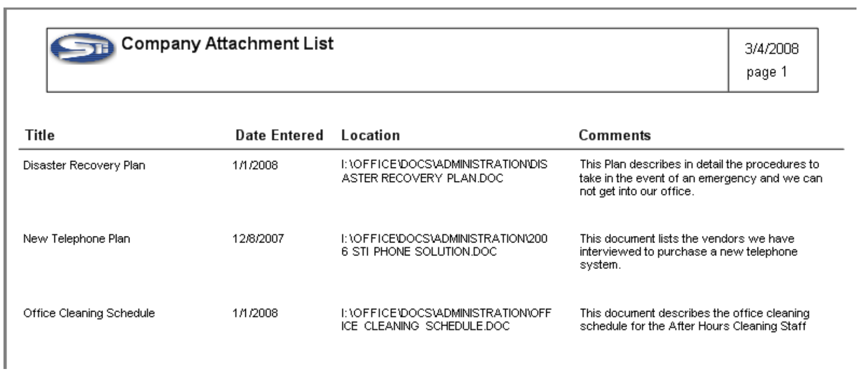
Employee	Title	Department	Job Status	Compensation	Supervisor
Smith, Thomas		Administration		46,000.00 per year	
Thomas, Joe		Mailroom	Full Time	53,000.00 per year	Cindy Brown
Headcount 2			**Total**	99,000.00	

Figure 9-33

Organization Attachment List

This report displays the attachments at the company level. You may use the following screen to add company attachments:





Company Attachment List

3/4/2008
page 1

Title	Date Entered	Location	Comments
Disaster Recovery Plan	1/1/2008	I:\OFFICE\DOCS\ADMINISTRATION\DISASTER RECOVERY PLAN.DOC	This Plan describes in detail the procedures to take in the event of an emergency and we can not get into our office.
New Telephone Plan	12/8/2007	I:\OFFICE\DOCS\ADMINISTRATION\2006 STI PHONE SOLUTION.DOC	This document lists the vendors we have interviewed to purchase a new telephone system.
Office Cleaning Schedule	1/1/2008	I:\OFFICE\DOCS\ADMINISTRATION\OFFICE CLEANING SCHEDULE.DOC	This document describes the office cleaning schedule for the After Hours Cleaning Staff

Figure 9-33

Personal Reports

Birthdays

This report displays all employees' birthdays for a given month or year. Information includes birthday day of the week, calendar day, employee position, and department. You can also choose to print employees without birthdays.

January 2008 Birthdays		Employee	Position	Department
Sunday	Jan 1	Smith, Diane L	Management Consultant	Administration

July 2008 Birthdays		Employee	Position	Department
Friday	Jul 4	Parker, Joyce	Administrative Assistant	Customer Support
Sunday	Jul 1	Beck, Lucus	Programmer	Application Programming
Thursday	Jul 2	Wade, Hans	Clerk	Mailroom

December 2008 Birthdays		Employee	Position	Department
Sunday	Dec 7	Bush, Jane Cindy	Administrative Assistant	Customer Support
Friday	Dec 2	Harris, Billie Bob	Custodian	Maintenance

Figure 9-16

Dependent Roster

This report displays dependent information for each employee who has a dependent. Dependent information includes name, relation to employee, date of birth, age, dependent type, address, phone number, and notes. Additional information includes employee's social security number and marital status.

Smith, Diane L Consultant - Department: Administration - Position: Management Consultant - SSN: 122-34-6587 - Marital Status: Married - Spouse:...

Dependent	DOB	Age	Dependent Type	Phone	Address	Notes
Robert Smith (Son)	04/24/2006	1 yr		(540) 842-9209	160 Charlies Street Hardy, VA 24101	
Zack Smith Jr (Stepson)	09/12/2000	7 yrs		(540) 842-9209	160 Charlies Street Hardy, VA 24101	Dependent through marriage. Must carry insurance.

Figure 9-16

You can also print this report from an employee's Dependent screen.

Emergency Information

This report lists all employees by department with their emergency information. Emergency information includes up to two people to contact in case of an emergency, their relationship to employee, contact's phone number and address, and special information such as employee allergies or medical conditions. Employees without emergency information will also appear on the report.

Administration

Employee	Notify	Phone	Address
Smith, Diane L	Zack Smith (Husband)	(540) 342-2732	160 Charlies Street Hardy, VA 24101
	Chris Castro (Sister)	(631) 342-9387	210 Martins Court Copique, NY 11749
Doctor	Jason Milligan	**Phone**	(540) 785-7354
	Special Circumstances: Allergies Trees Dogs		

Figure 9-36

You can also print this report from an employee's Emergency Information screen.

Labels (Avery 5160)

This report will print labels for mailing to employees on Avery 5160 labels.

Beck, Lucus 738 Roanike Blvd. Roanike, VA 24587	Bush, Jane Cindy 453 Howie Road Brightwaters, VA 24895	Epson, Sam 328 Dell Ct Felton, VA 24638
Harris, Billie Bob 711 Lindt Drive Denton, VA 24184	Parker, Joyce 35 Net Court Dover, VA 24755	Smith, Diane L 160 Charlies Street Hardy, VA 24101

Figure 9-37

Married Employees' Spouse Data

This report will display spouse information for married employees. Spouse information includes name, maiden name (if applicable), social security number, date of birth, and wedding date.

Employee	Spouse	Maiden Name	Spouse SSN	Spouse DOB	Wed Date
Parker, Joyce	Mary Jones				
Smith, Diane L	Zack Smith	Diane Dale	786497356	09/29/1942	03/22/1986
Smith, Thomas	May		Smith	12/04/1974	04/10/2004

Figu
re 9-38

Phone Directory

This report lists all employees alphabetically along with their home telephone numbers and their address information. See also Phone Directory (Condensed)

B

Beck, Lucus
Phone #1: (540) 721-1000
Address: 738 Roanike Blvd.
Roanike, VA 24587

Bush, Jane Cindy
Phone #1: (540) 721-1007
Address: 453 Howie Road
Brightwaters, VA 24895

E

Epson, Sam
Address: 328 Dell Ct
Felton, VA 24638

Figure 9-39

Social Security Number Listing

This report lists all employees and their social security number. Additional information includes payroll number, title, position, and department.

Employee	Soc Sec	Number	Title	Position	Department
Beck, Lucus	774-09-3764	0601121	Programmer II	Programmer	Application Programming
Bush, Jane Cindy	997-45-7683	127883	Administrative...	Administrative Assistant	Customer Support
Epson, Sam			Sr. Programmer...	Programmer	Application Programming
Harris, Billie Bob	887-23-6765	99762		Custodian	Maintenance
Parker, Joyce	551-34-7643	0307081		Administrative Assistant	Customer Support
Smith, Diane L	122-34-6587	87591	Consultant	Management Consultant	Administration
Smith, Thomas	123-45-6789		Administrative...	Administrative Assistant	Administration
Wade, Hans	997-21-3465	0404141	Mail Clerk	Clerk	Mailroom

Figure 9-40

Wedding Anniversaries

This report displays employee wedding anniversary information by month. Information includes employee name, wedding date, years married, employee position, department, and address.

April 2008		Employee	Spouse	Yrs	Position	Department	Address
Thursday	Apr 1	Smith, Thomas	May	3	Administrative...	Administration	2301 Berkley Ave. Roanoke, VA 24015

Figure 9-41

You can choose to print an entire year (default) or one month. You can also choose to print employees without anniversaries.

Chapter 10 Utilities

Importing

HR supports importing data from a variety of other software programs and other versions of Software Techniques Human Resources Systems. There are two options in ***HR*** for importing data into your SQL database.

Under the file menu there is a utility for importing data into your ***HR*** database. Before using this utility you will need to setup your data as you want it. This utility is primarily used to import a generic data file or data from E-2000 to your ***HR*** database that you have already setup. This can even be used to add employees to a ***HR*** database that you are using.

To use this utility you must be operating in Super Administrator mode.

To begin importing data, select **File**->**Import** from the menu. ***HR*** features an Import Wizard to lead you through the steps of importing your data.

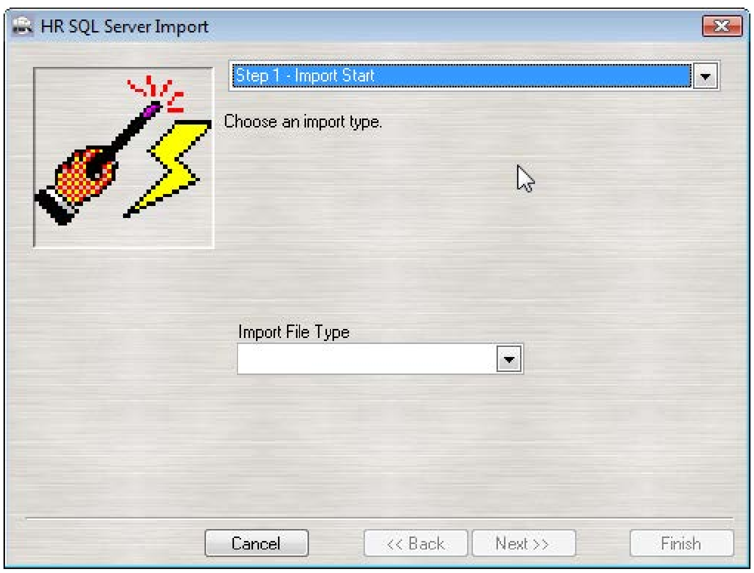


Figure 10-1

Generic Data File

With a generic data file, you can choose to import either employees or departments.

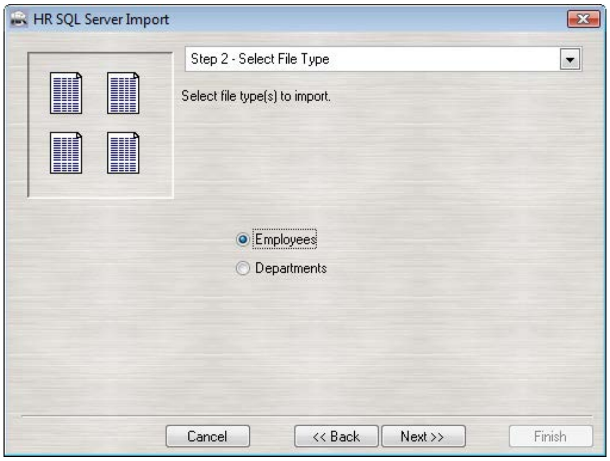


Figure 10-2

Next you must choose the Generic Data File to Import. It is helpful to use the first row of your import file as headers.

These will display the next step where you have to map the column names. Generic Data File types can be xls, txt, csv, dbf, etc.

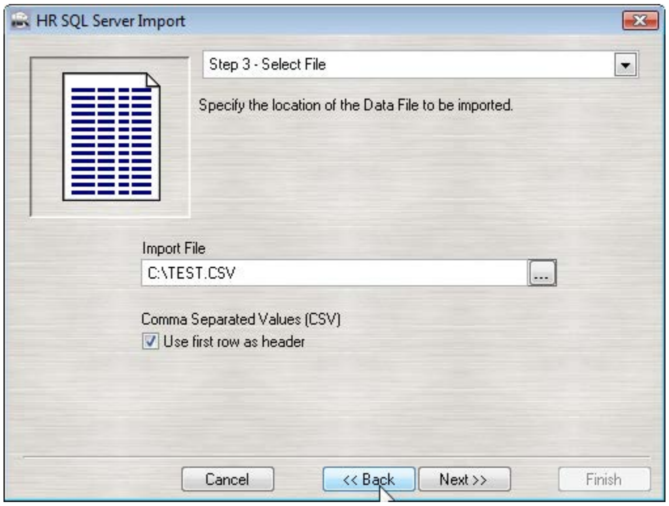


Figure 10-3

With generic data file imports, you will need to match the ***HR*** Fields to the fields in the import file. ***HR*** will try to match the fields as best it can. All of the fields do not have to be matched, but to move to the next step, you must match up the name field. You can match up fields by selecting a field and using the << and >> buttons or by dragging and dropping between the lists.

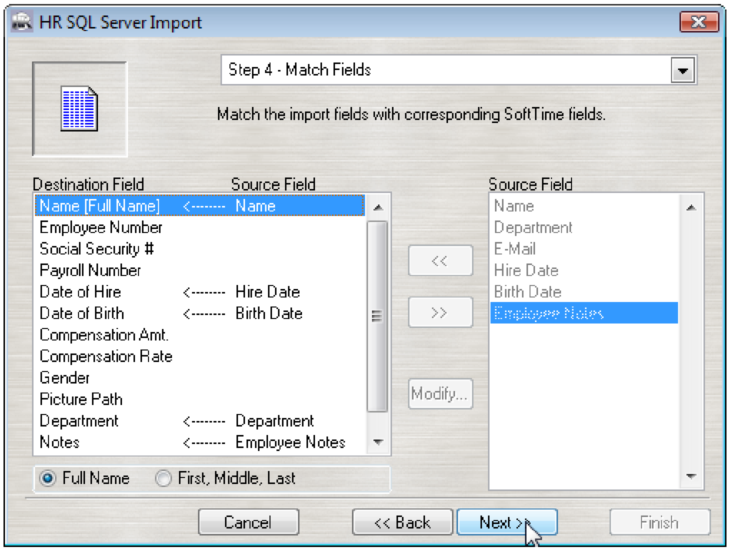


Figure 10-4

Duplicate Handling tells ***HR*** how you wish it to handle duplicate records that it comes across. Your choices are to skip or to allow duplicate records. Skipping will not import a record identified as a duplicate. Allowing duplicates will import the record and you can review both records in ***HR*** to determine which is valid. Merging duplicates will check the database to see if the Name+Hire Date combination already exists. If it does, the imported data will be added to the current data.

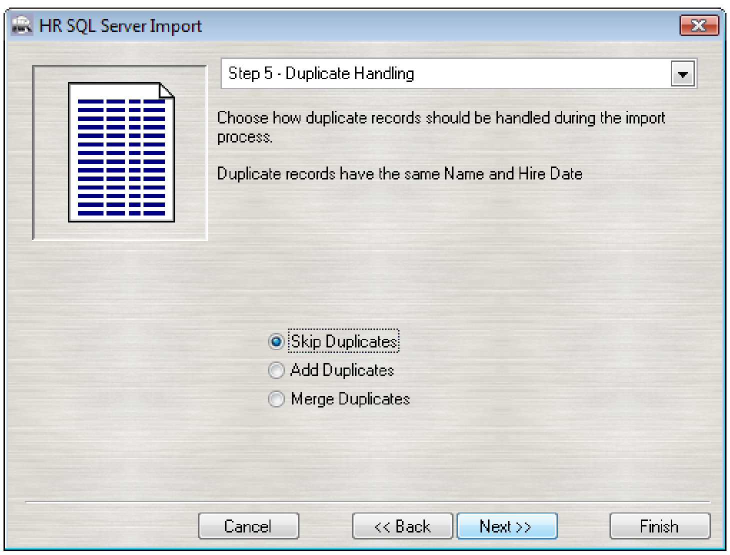


Figure 10-5

Press the **Next** button to move to the last page.

From here click the **Finish** button and the Import will begin. Depending on the number of employees you have, the import process may take several minutes.

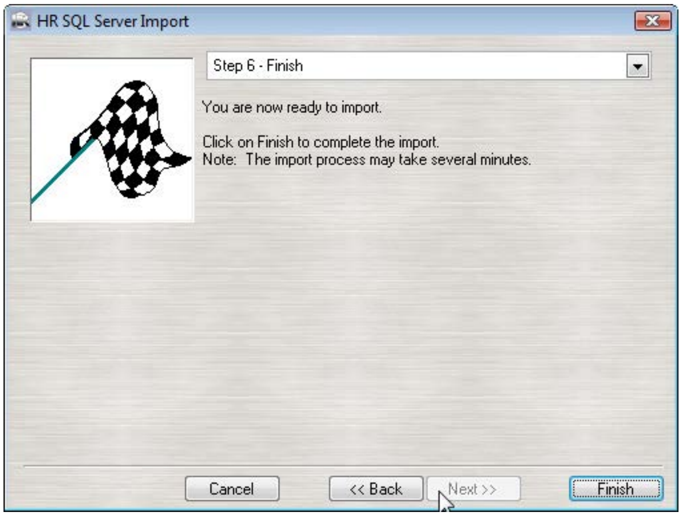
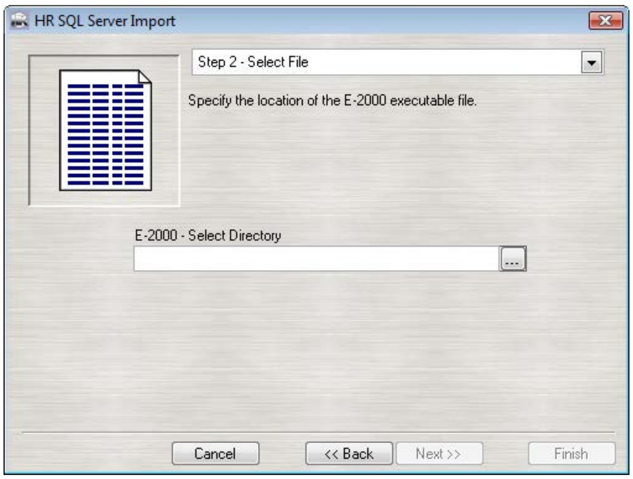


Figure 10-6

Importing from E-2000

Importing from E-2000 is very similar, but there is one less step. From the first screen, select E-2000. You will then be prompted to specify where the E-2000 executable is located.



After you click next, you will see the Duplicate Handling page as shown above.

Note – If you currently have a SoftTime or TimeKron database and are importing your E-2000 database, you should choose Merge Duplicates! If you do this, then your E-2000 employees will be imported into your current SoftTime/TimeKron/*HR* employees.

Then you will just need to click **Next** one more time to get to the final page and click **Finish**. The E-2000 import should then begin.

Exporting

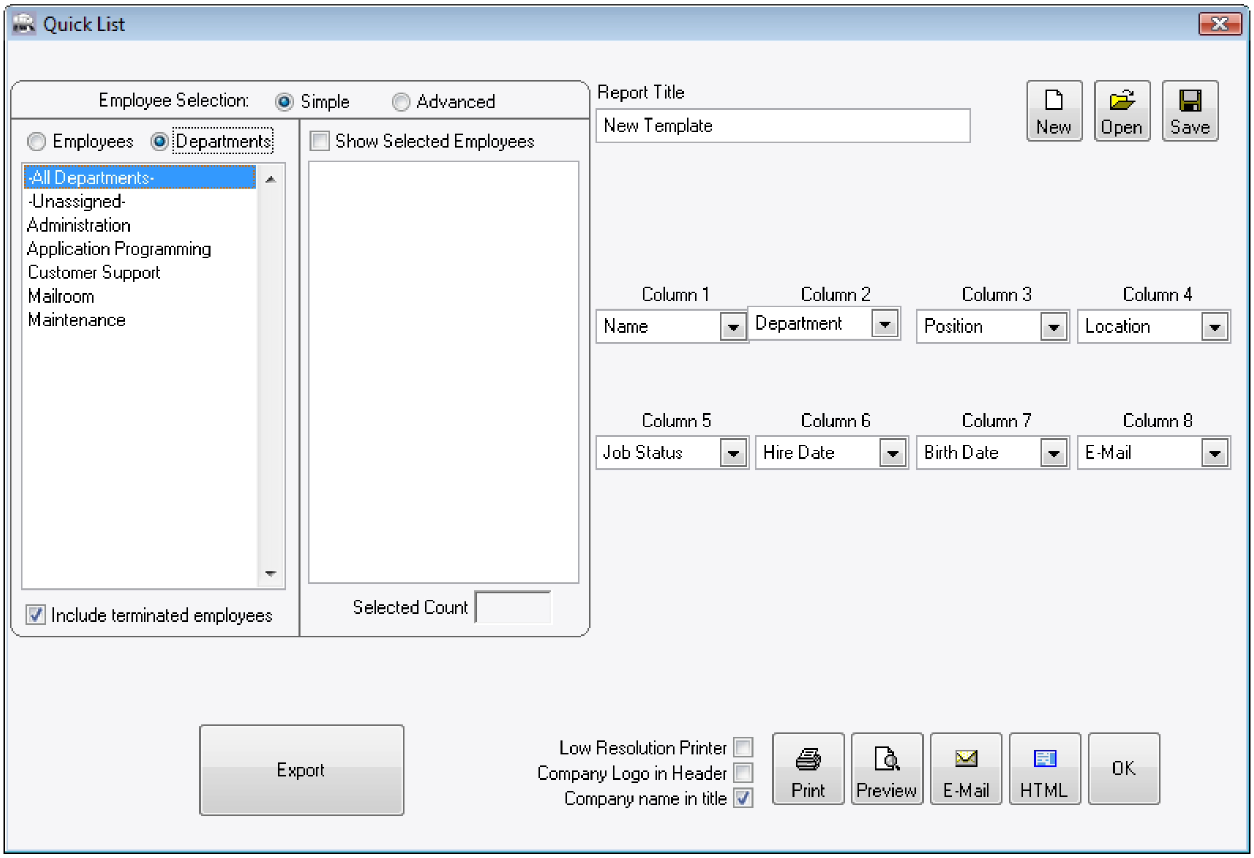


Figure 10-7

There are two ways in which to export from *HR*, from the Quick List screen or from **File->Export** on the toolbar. In both cases the Quick List screen will appear. Select the 8 column of data you would like to export, click Export. An EXCEL spreadsheet (.xls) will be created. This data can now be manipulated externally.

Advanced Export

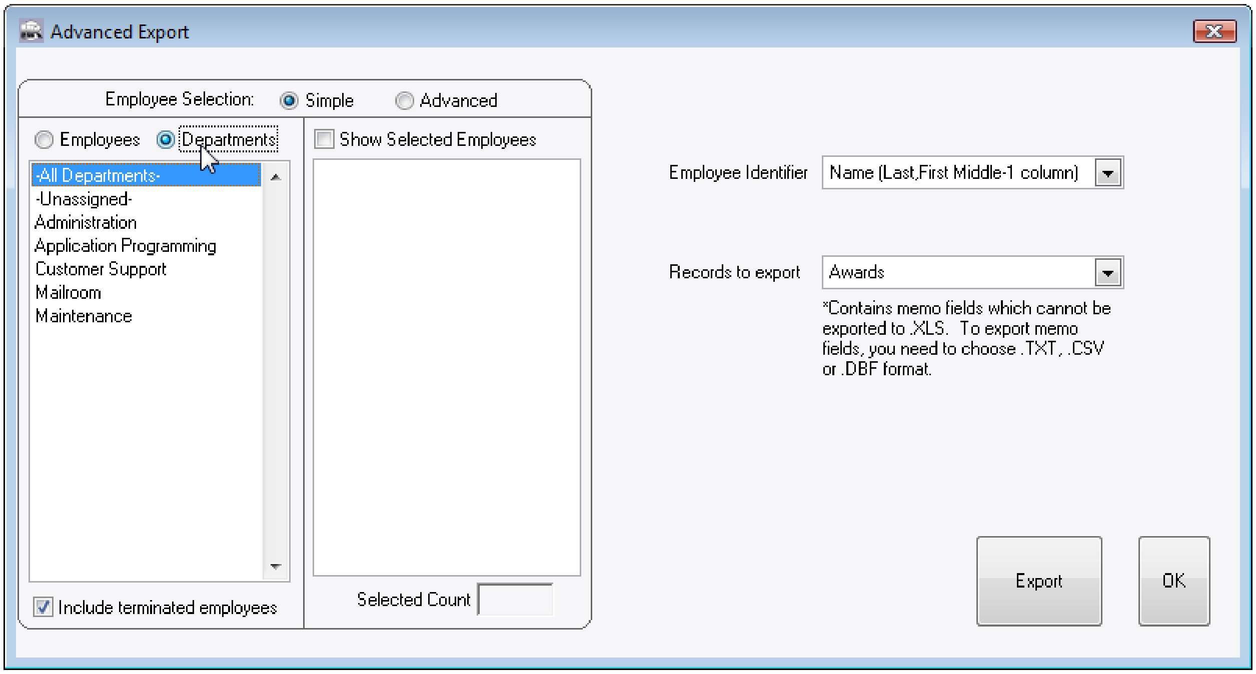


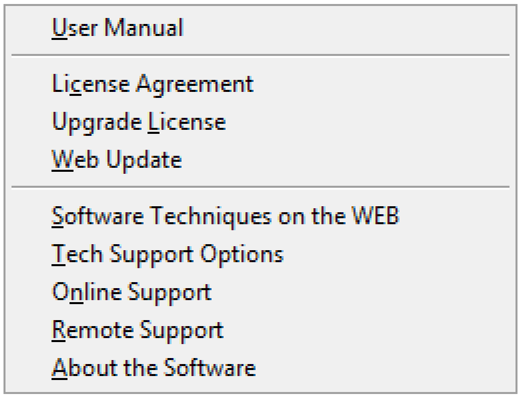
Figure 10-8

The normal export allows you to export data for which there is one and only one record for each employee (Social Security Number, Gender, Hire Date, etc.). The Advanced Export allows you to export data where there is more than one record for each employee. Things such as Award, Warnings and Evaluation can be exported using this utility.

On the left side of the screen, select the group of employees you wish to export. On the right side, select how you want the employee identified in each record. Then you can choose the category that you want to export from.

Chapter 11 Trouble Shooting

Help Menu



License Agreement

The License Agreement can be seen at the beginning of this manual.

Upgrade License

This utility allows you to upgrade your number of user licenses for ***HR***. This screen will display your current activation code and your current number of licenses. You can still call Software Techniques or your ***HR*** reseller and purchase the additional codes, and you will be given a new activation code to upgrade to the newly purchased number of user licenses.

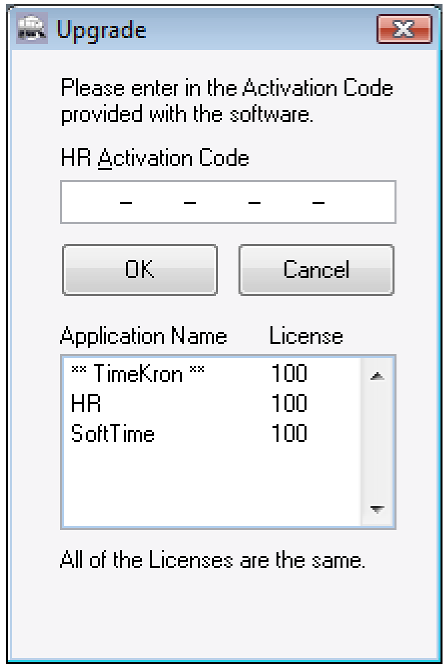


Figure 11-1

Once you enter the new activation code and click **OK**, ***HR*** will exit. The next time you enter the program, the new number of user licenses will be activated.

Web Update and Automatic Upgrades

This feature allows you to automatically check www.softwaretech.com for recent upgrades and patches. If you would like to set the interval for performing these checks, you can run the Web update option from the Help Menu.

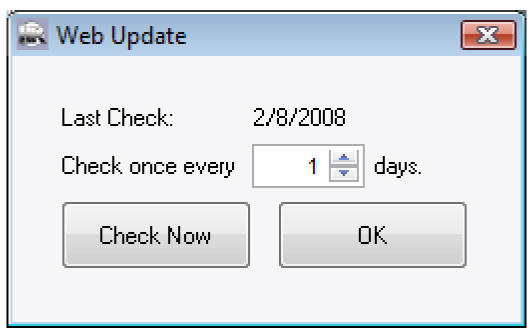
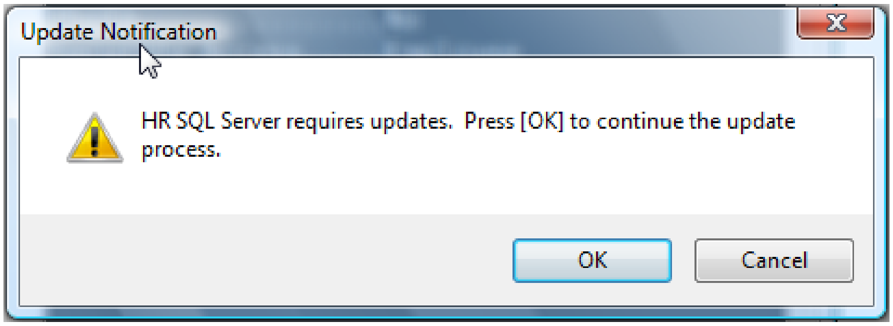


Figure 11-2

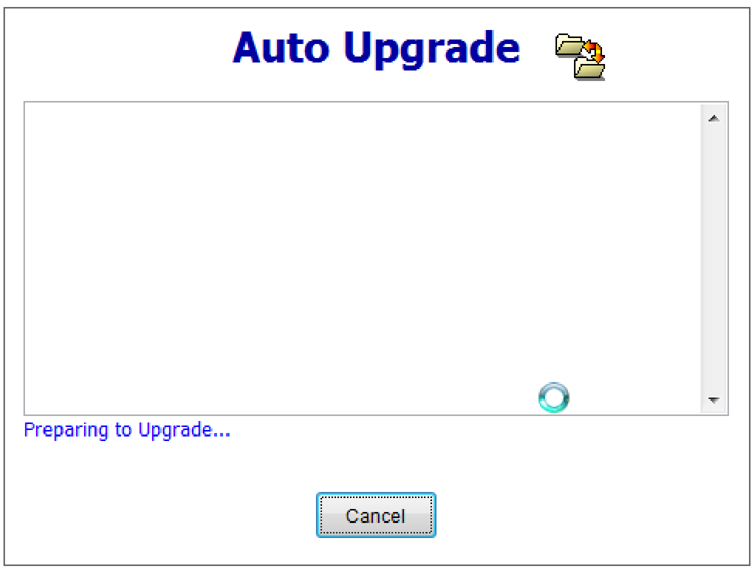
If a new version is available via the web an Icon will appear in the bottom right corner of the main screen:

To download the web update, click the web update icon . This will do two things. First it will download the update files to the auto-upgrade directory on your network. You will need to have read/write and file creation access to this directory to successfully download updates. Once the files are downloaded they will automatically be installed on your workstation. You will need to restart ***HR***. Most upgrades will not require you to reboot.

Each time you attempt to login to ***HR***, the software will automatically check the auto-upgrade directory to see if your workstation is running the most recently downloaded version of the software. If you need to upgrade your workstation you will see a screen that will require you to update.



As you upgrade your old ***HR*** executable will be backed up and a progress bar will de displayed. After completing the upgrade you will have to restart ***HR***.



Sometimes an upgrade will require that the SQL Database is also upgraded. ***HR*** constantly checks the SQL database to make sure it is compatible with the software. If the database and the application become out of sync, you should have your DBA run ***HR*** in DB administration mode.

Software Techniques on the WEB

This option launches your default Web browser to Software Techniques Inc. main Internet site. The web URL is http://www.softwaretech.com.

STI Website

About *HR*

The About ***HR*** screen gives information about your installed version of ***HR***. It is useful if you ever need to make a support call to give your version, serial number etc.

DB Administration Mode

When you run in DBAdmin mode the DBA will have access to the Configure button. For more information about the DB Administration mode, check out Chapter 2-Installation and Setup.

Customer Support

If the information you need to solve a problem is not in the manual, please do the following:

1. Review the list of Common Problems and Solutions that follow, to see if your problem is there

2. You can also receive on-line support via our Technical Support Web Page on the Internet at **http://www.softwaretech.com**. Product support is free for the first 15 days that you own ***HR***. Beyond that time, support and E-mail calls are billable.

3. Refer to the Microsoft Windows User Manual for help with problems caused by the operating environment or the Windows Graphic User Interface.

If steps 1-3 were not able to help, you may call Software Techniques Inc. at (540) 721-1002 for technical support. Our staff is on duty Monday through Friday, from 9:00 AM - 12:00 PM and 1:00 PM - 5:00 PM, Eastern Time. You may also FAX your questions to us at (540) 721-1010. Before you call, though, complete the following steps:

1. **Be sure you are eligible**. Product support is free for the first 15 days that you own ***HR***. Beyond that time, support and E-mail calls are billable.

2. Have the ***HR SQL*** serial and version numbers handy. You can find them on the installation CDs, and copy them here:
Activation Code ______________________ Version # ________

3. Note the amount of **available disk space** on your drive, ______________ and the amount of RAM on your computer __________________. Also, note the available disk space within your common directory _____________.

4. Verify your ODBC connection is working properly. Write down the name of the SQL Database you are connecting to. [_____________________] (It should appear on the main screen in [brackets]).

5. A problem may be database related so have your SQL DBA near by in case he/she needs to be consulted. Also make sure you have full read/write/create privileges to your common directory.

6. If an error has occurred, write down the first **error message** exactly as it appears on your screen. Write down the steps you took just before the error message appeared.

7. Be prepared to provide our Customer Support staff with any information they need. ***HR*** generates a log file that may help us diagnose complex problem. We may ask you to send this file to us for analysis.

Common Problems and Solutions

My Password doesn't work.

The **first time** you log in, the system defaults to a User Name of "Admin". No Password is required. Just press Enter and you will be logged in to the software. At this point, you can set up individual User Names and Passwords by clicking on the Employee Information tab.

Remember, the password field is case sensitive. Check your caps lock key. You can also adjust your workstation options for each individual workstation.

Error Message - **Cannot locate FoxPro Support Library**.

The computer does not have the FoxPro DLL files installed. These can be obtained by reinstalling the software. Make sure the data files are backed up before reinstalling.

Computer freezes when trying to load ***HR***.

You workstation probably does not meet the minimum requirements. Make sure that no other programs are running in the background. If the problem still occurs, change the display on the video driver to a standard Super VGA display.

Error message:

"Unable to login to ***HR SQL*** Server. Common directory does not exist."

You are unable to connect to the common directory. If it is on a network, make sure you are properly connected and logged in to that network.

Check your network cable. If the problem continues contact your network administrator.

Error message:

"Unable to login to *HR SQL* Server. Invalid ODBC Connection."

You are unable to connect to the SQL Database. This may be because your SQL Server is down or because your SQL account does not let you connect to the database. If the problem continues contact your SQL DBA.

Error message when trying to login:

"SQL Command w/ error [UPDATE ...]".

The SQL DBA has restricted your use of the database (permission) such that you cannot properly access the database in the required fashion. It has been altered into an unusable format. Have your SQL DBA run ***HR*** in DB Admin mode and use the configuration tools to repair the problems.

Printer display reads: **Memory Overload**.

Turn the printer Off and On. Go to your desktop, click **Start-Settings**-> **Control Panel**->**Printers**. Reduce the print resolution to the next lowest level. Set up the report for printing again.
Also, 2MB of printer memory is recommended.

Error Message - **Unable to Write to file named** _________.

HR cannot write to your hard drive or to the common directory. The most common problem is insufficient disk space. Free up some disk space. This can also occur if your network administrator has restricted your access to the common network directory

Error Message during installation - **Unable to Read** _________.

This may be a bad CD or a bad CD Drive. First remove the CD and reboot your computer. Reinsert the CD after you have logged back into Windows®. If the problem continues call Technical Support and report the exact error message that appears. The technical support staff can issue you a new CD.

Error Message - **Unable to Update Cursor**.

The user logged on to the network does not have read/write access to the common data directory. This is most likely a network rights issue.

Installation or Update Error Message - **Can't change properties of file named** _________.

User requires write access to the Windows directory so that ***HR*** can automatically update the .DLL files

Sometimes the menu options are disabled and I cannot click them.

You probably have too many screens open. Close some screens down. After importing, ***HR*** asked me if I wanted to exit and I said no, ***HR*** exited anyway. Why? After importing, it is always best to exit and restart ***HR***. This is to ensure that the import was successful.

Error message: **"Unable to login to *HR SQL* Server**. Base data is incomplete".

The SQL database has been altered into an unusable format. Most likely a critical table has been deleted. Have your SQL DBA run ***HR SQL*** in DB Admin mode and use the configuration tools to repair the problems. If data has been lost have your SQL DBA restore a SQL backup.

Error message: **"SQL Command w/ error [SELECT ...]"**.
The SQL database has been altered into an unusable format. Have your SQL DBA run ***HR SQL*** in DB Admin mode and use the configuration tools to repair the problems.

*Some words in **HR** may be cropped.*

The font size on the video card is set to large fonts. Change the font size to small fonts.

One or more employees appear to be “locked” when they shouldn’t be.

The lock table was not updated properly. Go into ***HR*** as a Database Administrator and click **Configure** in the Login screen. Move to the Check Data step and click the **Clear all Locks** button.

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