

# Personnel System Help File

Select the area you wish to look at

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## Overview



To install the program following the instructions for [configuration](#). You can then keep Personnel Records and produce Personnel Reports. The software provides the following:

1. Complete Personal Records for each employee. This is located using the existing staff menu.
2. Attendance Records including sickness and holiday booking.
3. Employment Contracts for each employee with legislative guidance covering English Law.
4. Job Description Records for new and existing jobs.
5. Appraisal Records for keeping track of employee progress and planning improvement.
6. Person Specifications to aid in the recruitment, selection and employee review.
7. Employee job movements within the company.
8. Job Pay Grading to help set equitable pay.
9. Training plans and performance review records.
10. Discipline and grievance records.
11. Recruitment and Selection documentation and records.
12. Company wide rules, regulations and employment policy.
13. Organization structures.
14. Standard Reports and forms for all of the above and the ability to customize and create forms and reports.
15. Backup Data.

To help you deal with the personnel functions available there is extensive help on the operation of the software and legislative requirements.

The Personnel System Help File available are called from the main menu.

## Employment and Personnel Desk






Company Existing Staff Job Reports Backup Database Help Exit

Menu Off






# Employment and Personnel Desk

Butto




Exit








-  COMPANY DETAILS
-  ORGANISATION STRUCTURE
-  COMPANY HANDBOOK - Rules, Policies and Procedures
-  COMPANY VEHICLES
-  COMPANY PAY GRADES

 28 DIARY

-  EXISTING EMPLOYEE
-  ADDING A NEW EMPLOYEE
-  TRANSFERS
-  TERMINATION
-  NEW STAFF CONTRACT

 LEGAL TELEPHONE ADVICE


-  HEALTH AND SAFETY POLICY
-  ACCIDENTS AT WORK
-  RISK ASSESSMENT

-  ATTENDANCE - INDIVIDUAL
-  ATTENDANCE - ALL EMPLOYEES
-  DISCIPLINE
-  GRIEVANCE
-  TRAINING - COURSES
-  TRAINING - EMPLOYEE
-  APPRAISAL

 NEW JOB


 JOB ADVERTISEMENT


 APPLICANTS

 JOB DESCRIPTION AND PERSONAL SPECIFICATION

 JOB SPECIFIC CONDITIONS

 STANDARD REPORTS

 EDITING/CREATING REPORTS

 STANDARD FORMS AND DOCUMENTS

 DATABASE MANAGEMENT

 BACKING UP

 IMPORTING/EXPORTING DATA

Select the menu option to look at or choose the functions listed below to find out more.

[Security](#)

[Company](#)

[Existing Staff](#)

[New Staff](#)

[Job](#)

[Reports](#)

[Database](#)

[Backup](#)

## Import and Export Data

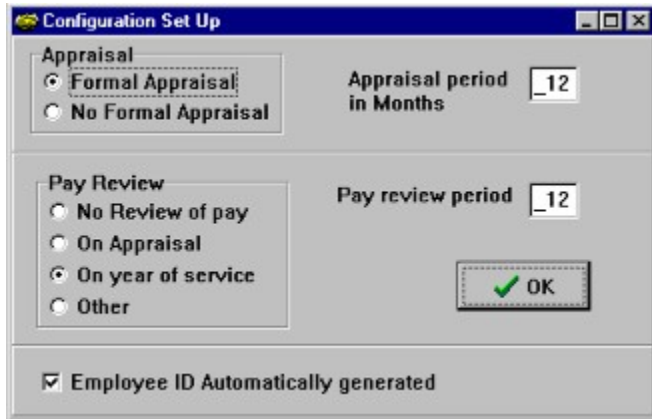
## Database Menu



Press the menu option you wish to look at.

## Installation and Configuration

If there is no information on the system about your company or you wish to alter configuration information using the Setup | Configuration option of the Company Menu then you will be shown:



The screenshot shows a dialog box titled "Configuration Set Up". It contains the following elements:

- Appraisal** section:
  - Radio buttons:  Formal Appraisal,  No Formal Appraisal
  - Text: Appraisal period in Months:
- Pay Review** section:
  - Radio buttons:  No Review of pay,  On Appraisal,  On year of service,  Other
  - Text: Pay review period:
  - Button:  OK
- Check box:  Employee ID Automatically generated

Note the Employee ID Automatically generated check box. If checked then all numbers for employees will be automatically generated. If unchecked then you will be offered the opportunity to manually enter the Employee ID - particularly useful if you are using another package that has employee ids e.g. Sage Payroll, Pegasus Payroll, etc.

This form also allows you to decide whether you carry out appraisals and revise pay at regular intervals. You should complete this to help the system monitor what is being entered on to the system.

You should now consider following the flow diagram below for adding records.



Menu Options (in relation to diagram above)

[Company|Setup|Company Details](#)

**Job|Description Person Spec.|New**

**New Staff|Add New Staff Member**

By following this sequence you can ensure that the employee records you put on the database have the necessary allocation of company and job.

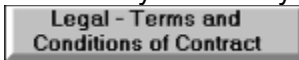
## Company Standard Information

Your company can be either a single unit or a number of units. To add or change your company name, address and general employee numbers you can select Company details from the Company|Setup Menu or by pressing the <Company Details> button.

### Company Details

You will need to consider the personnel rules, procedures and policy common to every employee in the company. This will cut down on the amount of typing you will need to do for contracts and allow you to have consistency in the way you treat your employees. This can be

set up using the company menu.



To create a standard global employment contract, sometimes called a handbook, you can select Handbook from the Company menu and press the HandBook button in the [Contract Generator](#) to set up the standard record.

Finally you may wish to set up an organisation structure. When you enter new employees an organisation structure will be created from the person the employee reports to. You may wish to review and change entries after looking at the organisation structure.

*New Employees*

*Organisation Structure*



# Company

The company menu relates to information that is common to the whole company.



## **Menu Option**

## **Purpose**

### Set Up

To enter or change company details.

To enter policies applying to your whole company e.g. statement on care of staff, confidentiality of information, etc..

Legal - Policy

### Structure

To view, change or print the organisation structure.

### Handbook

To enter policies applying to your whole company e.g. statement on care of staff, confidentiality of information, etc..

Legal - Policy

To enter standard procedures for carrying personnel activities e.g. dealing with accidents, discipline, grievance, absence, etc.

To enter rules and regulations for acceptable employee behaviour and work practice e.g. attendance, care of equipment, care of staff, health and safety, appearance, etc.

To create/edit job terms and conditions of contract and/or staff handbook documents e.g. taken from standard procedures and rules and regulations plus any standard contract requirements.

Legal - Terms and  
Conditions of Contract

### Pay Grades

To create/edit pay for specific grades. You should consider this if you wish to make global changes to a number of employees pay at any time in the future.

### Password Security

To change security passwords for access to the program.

### Vehicle Usage

To allow the addition of vehicles to the database and allocate staff use against those vehicles.

### Risk Assessment

To allow the evaluation of risk within the company through a risk assessment audit.

## Company Set Up

On selecting this option you are allowed to enter company details

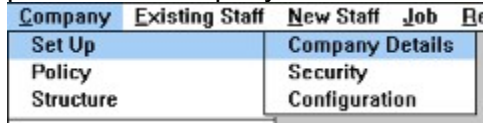
The screenshot shows a 'Company Information' dialog box with the following fields and annotations:

- Standard buttons for the company table:** A group of navigation buttons (back, forward, home, search, etc.) and an 'OK' button at the top.
- Name:** Taylor Richards Ltd
- Telephone:** 01483 571176
- Address:** 13 B York Road, Guildford, Surrey
- Fax:** 01483571176
- Contract Employees:** Number 0 (Annotated as 'Fixed Term Contract Employee Numbers')
- Full Time Employees:** Number 5
- Part Time Employees:** Number 1
- Postcode:** GU1 4DR
- Business type:** Software - Personnel (Annotated as 'Type or select business type')

If you wish to create a new company then press the + icon on the standard buttons group. Enter company name, address and postcode and select or enter the company type. You can change or enter the number of employees currently working as full time, part time or on fixed contract. To save your entries press the <OK> button.

## Company Details

To change company details select Company Details from the Company|Set Up sub menu or press the <Company Details> button.



You will see the form shown below.

A screenshot of the 'Company Information' form. The form contains the following fields and controls:

- Name:** Taylor Richards Ltd
- Telephone:** 01483 571176
- Address:** 13 B York Road, Guildford, Surrey
- Fax:** 01483571176
- Contract Employees:** Number 0
- Full Time Employees:** Number 5
- Part Time Employees:** Number 1
- Postcode:** GU1 4DR
- Business type:** Software - Personnel (with a dropdown arrow)

Annotations with blue arrows point to:

- Standard buttons for the company table (at the top of the form)
- Fixed Term Contract Employee Numbers (pointing to the 'Contract Employees' field)
- Type or select business type (pointing to the 'Business type' dropdown)

### **DO NOT DELETE A COMPANY UNLESS YOU HAVE NO EMPLOYEES WITH THE COMPANY.**

You can change any of the details.

The Business Type can be changed by either typing in a new Business Type or selecting a Business Type from the drop down list by pressing the down arrow to the right of the Business Type.

If you wish to add, delete or move to another of your companies you can use the list of buttons at the top of the form. These are explained by accompanying hints when your mouse rests on the button.

When you are happy with the changes press the OK button.

# Security

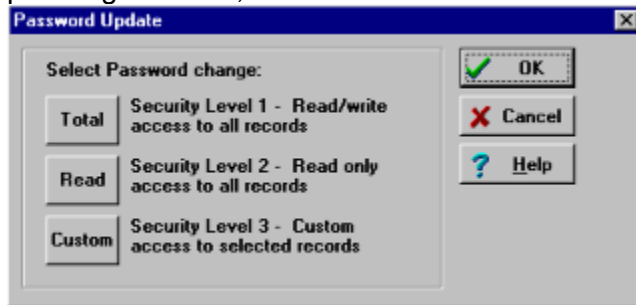
There are two security levels offering different access to records:

- 1. Security Level 1. This allows full access to all records without restriction.
- 1. Security Level 2. Allowing you to read the records but not allowing changes or additions to the records.
- 1. Security Level 3. Allows you to set up a custom interface which can be specified for a specific employee.

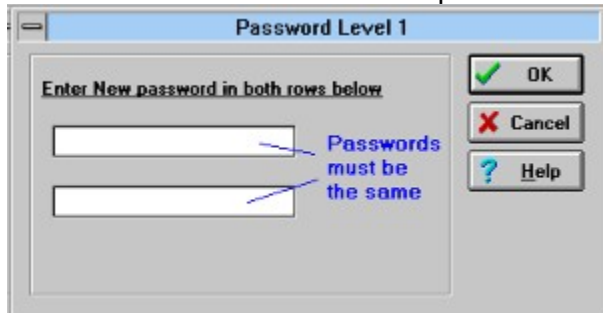
Security codes for levels 1 and 2 are set the same initially. If you would like to restrict access of other users or change your password you will need to change the code. To do this you can choose either Password Security from the Company menu or Security from the Company|Set Up sub menu.



You will come to the Password Update screen below. Select the level of security you want by pressing the Total, Read or Custom buttons.



You can now enter the password. You must enter it twice on the password form then press OK. You will return to the Password Update form. To finish press the OK button.



For security level 3 you press the Custom Button.

**Custom Password**

Read Only       Employee Related records only

OK      Cancel

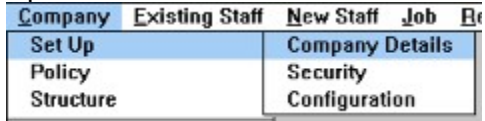
Password:

Title	First Names	Surname	Job Title
Mr	Richard	Taylor	Managing Director
Mr	Neal	Richards	Production Director
Mrs	Jane	Richards	Marketing Director
Mrs	Linda	Herbert	Purchasing Director
Mr	John	Smith	Financial Director
Mr	John	Jones	Sales Representative
Ms	Janine	Christ	Sales Representative
Mr	Gordon	Beltrum	Sales Representative

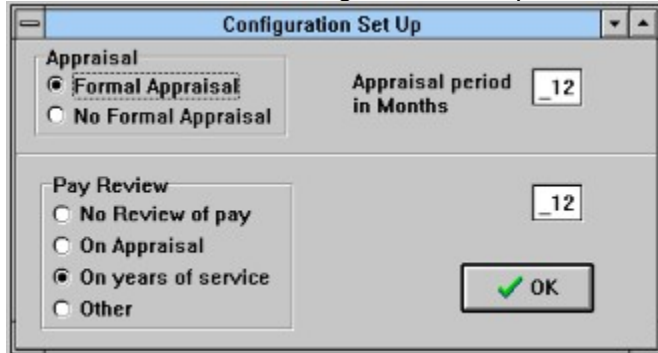
Put in the password for this employee and select the employee from the list. If you would like the employee to be able to change his or her record details turn read only off. If you want the employee to have access to only his or her records make sure the Employee Related records only box is clicked else the employee will see all records. When happy with your selection type in the password for the employee and press <OK>.

## Company Configuration

To change appraisal and pay review system settings select Configuration from the Compay|Set Up sub menu.



You will arrive at the configuration set up form shown below.



A screenshot of a 'Configuration Set Up' dialog box. The dialog has a title bar with the text 'Configuration Set Up'. It is divided into two main sections. The top section is titled 'Appraisal' and contains two radio buttons: 'Formal Appraisal' (which is selected) and 'No Formal Appraisal'. To the right of these radio buttons is a text box labeled 'Appraisal period in Months' with the value '\_12'. The bottom section is titled 'Pay Review' and contains three radio buttons: 'No Review of pay', 'On Appraisal', and 'On years of service' (which is selected). To the right of these radio buttons is a text box with the value '\_12'. At the bottom right of the dialog is an 'OK' button with a green checkmark icon.

The appraisal and pay review systems can be set up by clicking the option you require and setting the number of months between any formal appraisal and pay review periods. If you specify no formal appraisal or no pay review then the periods are ignored.

Once you are happy with your entries press the OK button. You will be asked if you are sure you want to change. Respond by pressing Yes if you are. If you press No then all changes will be ignored.

## Personnel Policy

Legal - Policy

The policy of the company is set up by using the policy option of the company menu.

To create a new policy statement you will be using the [Word Processing](#) facility.

The policy statements will include all areas relating to Personnel matters e.g. Employee treatment, employee behaviour, health and safety, etc.

The standard policy statements that appear in the Wordprocessor can be copied and printed to the job specific statements.

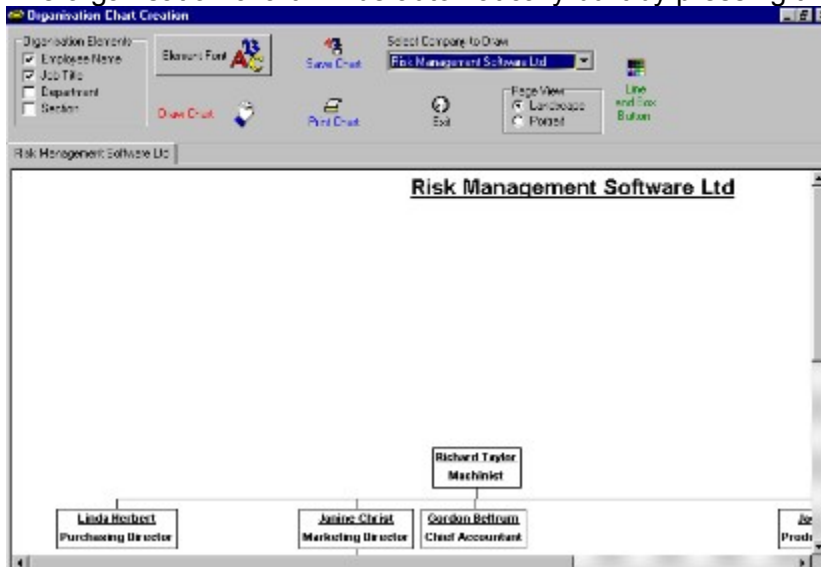
## Organisation Structure

You can create an organisation structure provided you have specified the direct relationship between employee and supervisor. If you need to do this you can select Personal Details from the [Personal Records](#) option of the Existing Staff menu or press the <Organisation Structure> button. The structure that can be drawn is limited to a pyramid shaped chart and the whole organisation structure is put on one page.

Once you are happy with your staff relationships you can build an organisation chart by selecting Structure from the Company menu or selecting the Organisation Structure button. From here select the company you wish to draw.



The organisation chart will be automatically built by pressing the Draw Chart button.



Use the Print button to print out the chart.

Select the Save button if you wish to save the chart as a separate file in Bitmap format (BMP). This can be used in most graphics packages.

If the Chart is too big for one page then it crosses multiple pages.





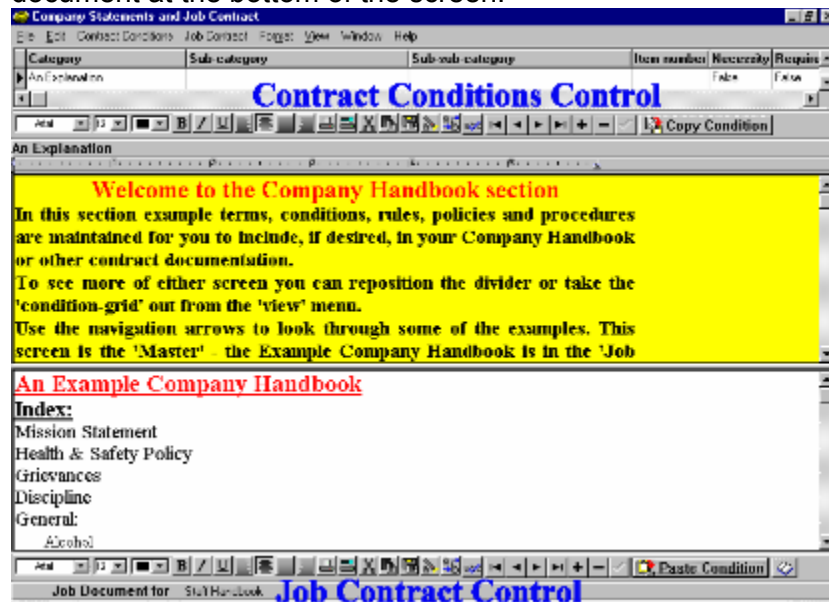
You can change the font colour, type and size by selecting the font button and change the line drawing boxes, the background of the boxes and linking staff by selecting Line and Box Button.

## Standard Employment Contract Conditions

### Legal - Terms and Conditions of Contract

You can set up contract conditions and master contract headings using this option.

To create/edit a new Standard Employment Contract Conditions statement you will be using the [Word Processing](#) facility. The category Employment Conditions, Master offers a list of headings in the master document which should be the first thing copied to the job contract or Handbook document at the bottom of the screen.



To build a job contract select records from the master documents and copy them to the job contract using the <Copy Condition>, <Paste Condition> buttons.

### Company Standard Procedures

Standard procedures are set up to help define what should be done to deal with personnel issues. The procedures outlined can be used to develop Handbooks, Standard job specific Terms and Conditions of Contract, Notices for staff and compilation with standards e.g. ISO 9000 - Training procedure.

To create/edit a new Standard procedure statement you will be using the [Word Processing](#) facility.

You can use any procedure typed or chosen from the list available to create Job Terms and Conditions.

### Company Standard Rules and Regulations

Standard rules and regulations are set up to help define what codes of practice employees should work to. The rules and regulations outlined can be used to develop Handbooks, Standard job specific Terms and Conditions of Contract, Notices for staff and compilation with standards e.g. Health and Safety.

To create/edit a new Standard Rule and Regulation statement you will be using the [Word Processing](#) facility.

You can use any Rule and Regulation typed or chosen from the list available to create Job Terms and Conditions.



## Pay Grades



You can change or add pay scales/grades for individuals using this option or pressing the <Company Pay Grades> button.

Grade	1	Overtime Rate / hour	
Points on Scale	6		
Bottom Pay	£50,000.00		
Top Pay	£70,000.00		

Update Employee Records

You can enter the grade as either 1..99 or A..Z or A1..Z99.

The points on the scale determine the split of the pay grade into equal elements e.g. if pay grade A has a salary range from £20,000 to £25,000 and the pay scale includes 5 points then each point represents £1,000.

It is useful to use pay grades and scales so that updates in pay are easy to calculate and apply globally to everyone on that grade.

When you have made changes to pay structure you should press the Update Employee Records to allow employee records to be updated with the new pay. You can override the pay in the individual records if you require.

## Risk Assessment

The screenshot shows the 'Risk Assessment Entry' window with the 'General' tab selected. The window has a title bar with standard OS controls and a toolbar with navigation buttons (back, forward, home, end, add, subtract, check) and a 'Close' button. Below the tabs, there is a section for 'Assessor Name' with three input fields: 'Title' (containing 'Mr'), 'First Names' (containing 'John'), and 'Surname' (containing 'Smith'). Below this is a 'Date of Assessment' field containing '01/01/1997'. At the bottom, there is a paragraph of instructional text: 'Carry out risk assessment by filling in the appropriate boxes on the four pages. You can see the current risk assessment by filling in the first 3 pages. Update records by changing date of assessment rather than repeating all entries for a past assessment.'

This offers a simple approach to developing a risk assessment. It revolves around you classifying the risks. You start with a general page offering you the opportunity to enter an assessor name and the date on which the assessment takes place. To add, move or delete a record from the risk assessment file use the navigation buttons at the top of the page. Use the next three pages to enter details of the risk operation.

### ACTIVITY PAGE

The screenshot shows the 'Risk Assessment Entry' window with the 'Activity' tab selected. The window has the same title bar and toolbar as the previous screenshot. Below the tabs, there is an 'Activity Group' dropdown menu with 'Lifting and Carrying' selected. Below this is an 'Activity description' text area containing the text 'Move 500Kg goods to stores.'. At the bottom, there are two input fields: 'Accident Probability' with the value '3' and 'Estimated Accident Cost' with the value '£1,000.00'. To the right of the 'Accident Probability' field, there is a legend: '1 - Low, 10 - High'.

The type of activity carried out by employees. This is known as the activity group and some examples are shown in the drop down list. You can add to this by simply typing in a new activity in the Activity Group box. Try to put the chances of this activity causing an accident in the Accident Probability box (1 represents virtually no possibility, 10 represents 100% possibility of accident). The accident cost represents an average cost of the accident occurring taking into account such things as lost time at work, retraining costs, investigation costs, insurance and compensation costs, updating equipment, machinery, practices, etc. You may find that past

records of accidents may help you decide on such costs.

## HAZARD PAGE

**Risk Assessment Entry**

General | Activity | Hazard | Action

Hazard Group: Poor Use of Equipment

Hazard description  
Trolley out of balance can fall on user

Current Hazard Controls  
3 wheel trolley can accept 5 tonne load

Hazard Risk Rating: 4  
1 - Low, 10 - High

The nature of the hazard is shown in the Hazard Group. You can select the Hazard from the drop down list or enter a new Hazard Group by typing in the Hazard Group box. The Hazard represents the opportunity to cause an accident and includes such areas as heavy loads, Slippy surfaces, chemicals, radiation, dangerous equipment, load noises, etc. Consider what controls you currently use to reduce the hazard e.g. protective clothing, equipment guards, frequent inspection, etc. Consider how well those controls work. The Hazard Risk Rating refers to the severity of the hazard if an accident should occur. 1 represents a minor accident such as a bruised finger and 10 a major accident such as factory burnt down and lives lost.

## ACTION

**Risk Assessment Entry**

General | Activity | Hazard | Action

Action to be taken to reduce risk  
Buy 4 wheel wide trolley

Estimate Action Cost (£) £350.00 Total cost of reducing risk for the company

Estimate Action Value (£) £2,500.00 Total value of savings in terms of insurance, lost days, replacement, etc.

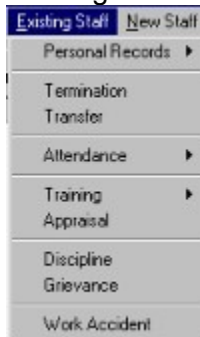
Consider what action could be taken to reduce the possibility of an accident occurring and reduce the impact of such an accident e.g. changing procedures, training, equipment, etc. How much would it cost to change and what would be the financial savings involved e.g. enforcing

the use of safety glasses may cost an additional £5,000 per year but save potentially £10,000 per year in eye accident related costs.

Once you have completed all entries you can end your session by pressing the <Close> button.

## Existing Staff

Existing staff information can be obtained from the main menu option shown.



The options available are

**Personal Records** or <Existing Employee> button

**Termination** or <Termination> button.

**Transfer** or <Transfer> button.

**Attendance** or <Attendance - Individual> or <Attendance - All Employees> button.

**Training** or <Training - Courses> or <Training - Employee> button.

**Appraisal** or <Appraisal> button.

**Discipline** or <Discipline> button.

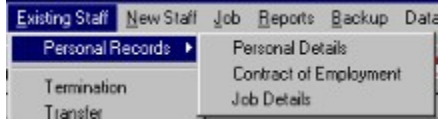
**Grievance** or <Grievance> button.

**Work Accident** or <Accident at Work> button.



## Existing Staff Personal Records

You can change employee records by choosing the Personal Records option of the Existing Employee Menu or press the <Existing Employee> button.



This gives you the opportunity of changing:

[Personal Details](#)

[Contract of Employment](#)


[Job Details](#)

## **Check Existing Employee**

This will offer a list of employees. By selecting one using the mouse the record becomes the current one. To edit the current record simply choose an entry below the list.

## Employee Details

Employee records are maintained on the Employee Detail Form.



The screenshot shows a Windows-style application window titled "Employee Details". At the top, there are "OK" and "Cancel" buttons, and a "Choose existing employee" section with navigation arrows and a "Help" button. Below this is a table with columns for Surname, First Names, Title, and Job Title. The first row contains the values: Beltrum, Gordon, Mr, and Chief Accountant. The main form area contains several input fields: Title (Mr), First Names (Gordon), Surname (Beltrum), Home address (The address), Employee Date of Birth, Home post code (GU1 1TY), Home Telephone (01246 758999), and Home E-Mail/Fax. A "Staff Picture" box contains a small photograph of a young child. At the bottom, a breadcrumb trail reads: Home / Work 1 / Work 2 / Personal / Financial / Benefits /

You can enter basic information specific to this employee. There are six pages on the form which can be selected by pressing the Tab at the bottom of the page using the mouse.

You can select another employee by either using the employee navigation buttons or pressing the mouse button on the Check Existing Employee box. If you have a windows bitmap picture for the member of staff (file extension BMP) you can put it the Staff Picture box by double clicking the mouse in the box and entering the file name in the resulting form dialog.

Home - as shown above.

[Work 1](#)

[Work 2](#)

[Personal](#)

[Financial](#)

[Benefits](#)

## Financial - Employee Details

The screenshot shows a software window titled "Employee Details". At the top, there are buttons for "OK", "Cancel", and "Help". Below these is a "Choose existing employee" section with navigation arrows and a checkmark. A table lists employee details:

Surname	First Names	Title	Job Title
Belum	Gordon	Mr	Chief Accountant

Below the table are several input fields for bank information:

- Bank Name:** Midland
- Bank Address:** The Bank
- Bank Telephone:** (empty field)
- Bank Sort Code:** 12-12-12
- Bank Account No:** 9999999999
- Payment Period M:** Monthly (dropdown menu)

At the bottom, a breadcrumb trail reads: Home / Work 1 / Work 2 / Personal / Financial / Benefits /

Gives bank information about the employee.

# Benefits - Employee Details

The screenshot shows a software window titled "Employee Details". At the top left, there are "OK" and "Cancel" buttons. Below them is a "Choose existing employee" section with navigation arrows and a "Help" button. A table below this section contains the following data:

Surname	First Names	Title	Job Title
Belum	Gordon	Mr	Chief Accountant

Below the table are three sections for benefits:

- Pension**: Eligible on 10/10/2017, Joined scheme on 10/10/1995. Below this is a "Details of plan" text area.
- PHI**: Eligible on [empty], Joined scheme on [empty]. Below this is a "Details of plan" text area.
- Other Benefits**: Below this is a large empty text area.

At the bottom of the window, a breadcrumb trail reads: Home / Work 1 / Work 2 / Personal / Financial / Benefits /

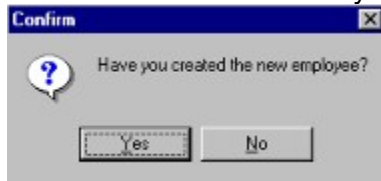
Allows the entry of any pension or insurance plan you have set up for the employee.

## Individual Contract of Employment

### Legal - Terms and Conditions of Contract

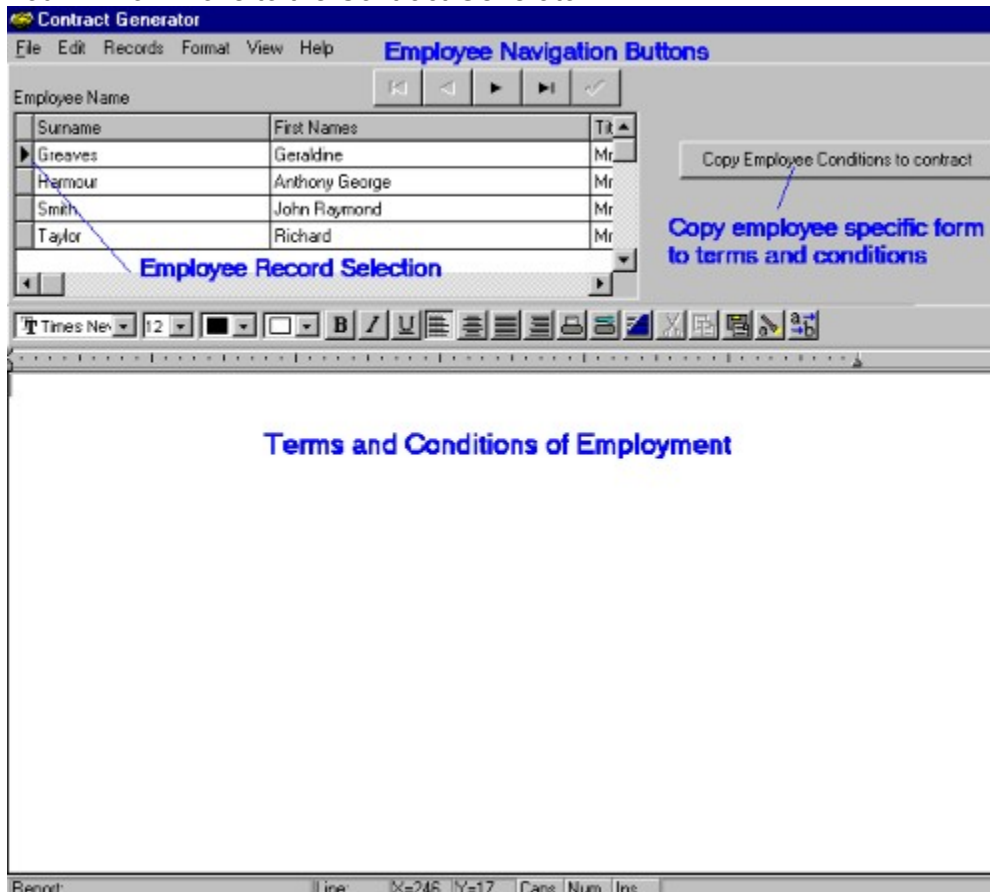
You will need to create/edit terms and conditions of employment for every member of staff and issue a copy to them. To do this you can use the Contract of Employment option from the New Staff menu or the <New Staff Contract> button.

You will be asked whether you have created the new employee.



If it is an existing employee then select <Yes>. If you have not yet started employment of the member of staff select <No> and you will be given the opportunity to [Add a New Staff Member](#).

You will now move to the Contract Generator.



If there is no terms and conditions shown for this employee then you will have to copy across a specific form for employee details using the [<Copy Employee conditions to contract>](#) button.

You should now be able to copy across standard conditions of contract for this job using the <Copy Job Contract Conditions> button and/or use the <Carry out Merge> button to merge the fields on the form with relevant data from your records.

**Contract Generator**

File Edit Records Format View Help

Employee Name

Surname	First Names	Tit
Greaves	Geraldine	Mr
Hamour	Anthony George	Mr
Smith	John Raymond	Mr
Taylor	Richard	Mr

Details of terms and conditions relating to the employees job.

Copy Employee Conditions to contract

Copy Job Contract Conditions

Carry out Merge

Merge Fields with employee data

**Statement of Main Terms and Conditions of Employment**

This statement dated \*[Date] sets out the main terms & conditions of employment, forming part of the contract of employment by which

\*[Name]  
\*[Address]

employs

\*[Title] \*[First Names] \*[Surname]  
\*[Address]

**Employment Commencement:** \*[Job start date] to \*[Job end date].  
**Continuous Employment began on:**

**Job Title:** \*[Job Title]  
**Brief description of job:**

Name: Form Line: 1 X=246 Y=139 Caps Num Ins

## Employee Conditions Copy

### Legal - Terms and Conditions of Contract

The selection form appears.

The screenshot shows a software window titled 'Copy Employee Cond'. In the background, there is a form with the following fields:

- Statement of Main Terms and Conditions of Employment**
- This agreement dated: \*{Date} sets out the main terms & conditions of employment. It forms part of the contract of employment by which:
  - \*{Name}
  - \*{Address}employs
- \*{Title} \*{First Name} \*{Surname}
- \*{Address}
- Employment Commencement: \*{Job start date} to \*{Job end date}.
- Continuous Employment begins on:
- Job Title: \*{Job Title}
- Brief description of job:
- Place of work:
  - \*{Principal location}
- Starting Salary: \*{Current Salary} Grade: \*{Grade}
- Payment Method:
  - Your salary will be paid by cheque/bankbook transfer or weekly/monthly/quarterly/annually on ... of the week/month

Select the appropriate form if there a number of them and press the <Copy to Employee Contract> button.



## Individual Job Details



You have the opportunity to view and change any records that are specific to a given employee in his/her job.

If the employee has worked in other jobs within the company in the past then you can use the <Employee Job Details> button to view them.

The screen shows 3 pages to look at:

[Employee's Job](#)

[Job Record](#)

[Job Details](#)

## Employee's Job



Allows the editing of current employee conditions in relation to the job e.g. hours of work, where working, etc. Fill in as required.

**Employee Job Details**

Employee:  Employee's Job Details:  Employee Name:

Employee's Job:  Job Record:  Job Details:  *If previous jobs within company*

Job Title:  Department:  Section:

Principal Work Location:  Manager:

Job Start Date:  Job End Date:  Work Phone Number:

Reason For Job Change:

Normal Working Hours

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
Start Time	<input type="text"/> 09:00:00	<input type="text"/> 09:00:00	<input type="text"/> 09:00:00	<input type="text"/> 09:00:00	<input type="text"/> 09:00:00	<input type="text"/>	<input type="text"/>	Total Hours Per Week: <input type="text"/> 40
Finish Time	<input type="text"/> 17:00:00	<input type="text"/> 17:00:00	<input type="text"/> 17:00:00	<input type="text"/> 17:00:00	<input type="text"/> 17:00:00	<input type="text"/>	<input type="text"/>	
Hours	<input type="text"/> 8	<input type="text"/> 8	<input type="text"/> 8	<input type="text"/> 8	<input type="text"/> 8	<input type="text"/>	<input type="text"/>	

## Job Record

Legal - Attendance

Employee Job Details

Employee's Job Details Employee Name: Mr Neal Richards

Employee's Job Job Record Job Details

**Attendance Records**

Day attendance	Attendance Mode	Attend Description
14/05/97	T	(Memo)
15/05/97	T	(Memo)
16/05/97	T	(Memo)
17/05/97	T	(Memo)
09/06/97	H	(Memo)
10/06/97	H	(Memo)
11/06/97	H	(Memo)
12/06/97	H	(Memo)

**Attend Description**

**Training Records**

Training start	Training finish	Course Title	Actual Training outcome	Expected Training outcome
14/05/97	17/05/97	Management		

This gives you information about absence and training experienced by the employee while working in the current job. The attendance mode is just a code to help the table interpret absence:

- N - Scheduled Non Work or Official Non Working Days.
- H - Holiday. Official holiday dates.
- S - Sickness. Absence through illness.
- T - Training. Courses out of work not on the job.
- O - Other. Unspecified.

The attendance description you enter can give more information.

## Job Details

The screenshot shows a software window titled "Employee Job Details" with a blue header bar. Below the header, there are navigation buttons and a section for "Employee Name" containing "Mrs Geraldine Greaves" and an "OK" button. A tabbed interface at the bottom of the header shows "Employee's Job", "Job Record", and "Job Details" (which is selected). The main content area is divided into several sections:

Grade	Period Of Pay	Holiday Entitlement/year	Current Pay per year	Overtime rate per hour
2	2	28	£25,000.00	

**Key Objectives**

To ensure all staff work at their optimum efficiency  
Job Rating:62 Company Rating:19

To keep a tight control on financial budgets  
To help set and monitor financial budgets

**Key Responsibilities**

6 direct staff  
3 indirect staff  
Job Rating:41 Company Rating:11

Financial control systems

**Key Duties**

Produce end of month and end of year financial statements  
Set staff targets and organise workloads  
Job Rating:48 Company Rating:25

Monitor and control company bank accounts.

This gives you information about the principal activities, responsibilities and objectives for the employee in the job and how the job creator has rated their importance for the job and the company.

## Employee Termination

Legal - Termination  
of contract

The form below appears.

Termination

Select Employee to terminate

Greaves

Date of Termination 29/04/96

Enter reason for termination

Moved to another job at Software Systems Direct. Moved because of pay.

It allows you to enter when the job is terminated and the reason the job has been terminated. Press <OK> to accept changes or <Cancel> to not update records.

## Employee Job Change

Legal - Termination of contract

**Job Change**

Current Position	Surname	First Names	Title
Select Employee:	Greaves	Geraldine	Mrs

Current Job: **Financial Director**

Job End Date: 29/04/96

Reason for Change

Require more involvement in Marketing matters

**New Position**

New Job: Marketing Director

New Manager: Taylor

Job Start Date: 29/04/96

This allows you to change the job for the employee in the top panel.

The steps are:

1. To change the employee for transfer click in the employee name box and select the employee.
1. Set the reason for change in the necessary box.
2. Select the new job the employee is going to.
3. Select the new manager the employee is to work under.
4. Update Job end date and new job start date.
5. Press <OK> to accept or <cancel> to ignore changes.

## Employee Attendance

Legal - Attendance

You can view and change employee absence by looking at [individual absence](#) records or [multiple absence](#) records.

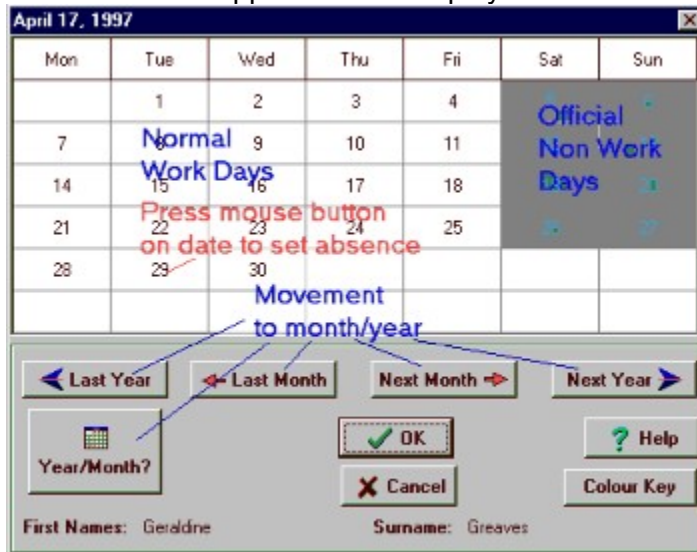


Select the option corresponding to the individual or group viewing and editing of attendance records.

## Employee Attendance Records

### Legal - Attendance

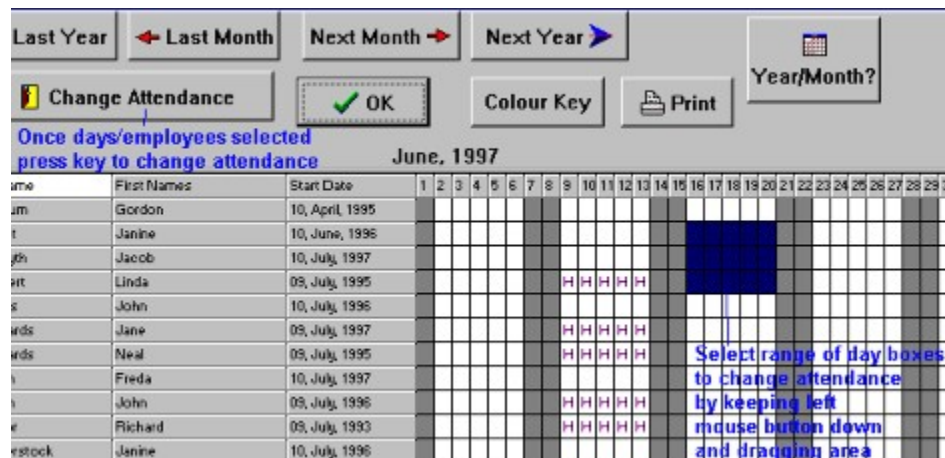
Once you have selected an employee from the Staff Member Selection Box you will find a month calendar appear for the employee.



This shows you the official working and non working days for this member of staff provided you have entered details of their normal working in the [employee details](#) record. The white boxed dates represent the normal working days.

You can move between months by pressing any of the movement buttons described in the illustration above. If you have a specific month/year to go to press the <Year/Month?> button and fill in the Year and Month in the boxes provided.

To enter an absence for a particular date press the mouse button when the cursor is over that date.



A box appears allowing you to enter the type of absence and any details of that absence. It is best to put details on the first day of such absence. You should check the unauthorised box if the absence was not authorised by the company. When completed you press the <OK> button and return to the calendar to see the colour of that date change.



May 12, 1997

Mon	Tue	Wed	Thu	Fri	Sat	Sun
		Holiday specified	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26						

**Text Colours**

- Scheduled Non-Work
- Holiday
- Sickness
- Training
- Other

**Background Colours**

- Authorised leave
- Unauthorised leave

Colour Key

Year/Month? Year

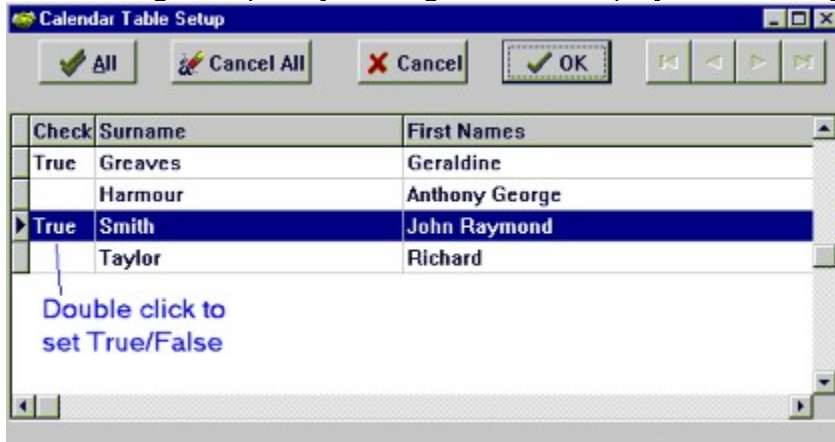
First Names: Anthony George      Surname: Hamour

If you want to see what the colour represents simply press the <Colour Key> button. A box appears showing the meaning of text colours for boxes. Alternatively you can press the mouse over the date to return to a view of the absence record (useful if you have made a mistake). To get rid of the absence box press the mouse button over the right side of the text colour box.

## Employees Attendance Records

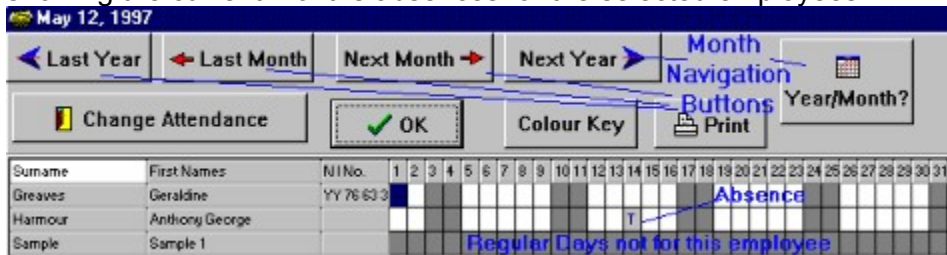
Legal - Attendance

On selecting this option you will get a list of employees sorted by surname.

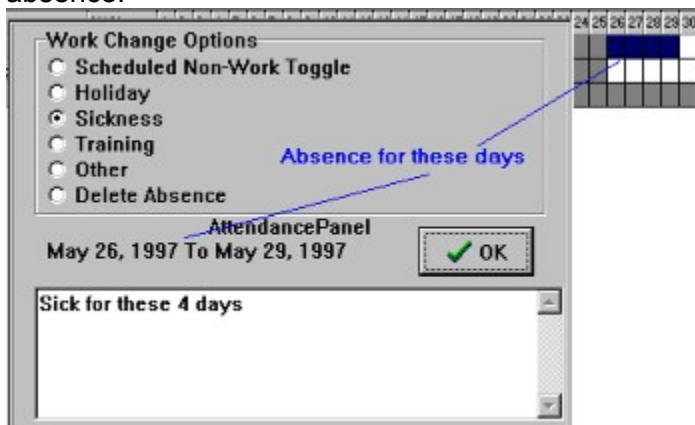


To select employees to look at double click in the check box next to the employee name ( a True record is viewed). If you wish to cancel the selection of employees press the <Cancel All> button. If you wish to select all the employees press the <All> button.

Once you are happy with your selection press the <OK> button. The calendar screen appears showing the current months absences for the selected employees.



You may wish to add or remove absences. To do this selected the date or dates you wish to change for a specific employee (to choose a range of dates simply press the mouse button down on the first date and keep it down while moving the mouse pointer to the last date. A box appears offering you the opportunity to enter the type of absence and any details of that absence.



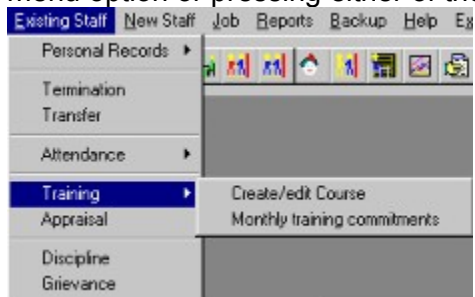
Press the <OK> button when you are happy with your entry.

The <Colour Key> button offers the key to colours used to represent the different type of absence and works in the same way as for [individual employee absence](#) records. When you have completed all entries press the <OK> button to return to the main menu.

## Training



Training records can be viewed and changed by using the training options of the Existing Staff menu option or pressing either of the <Training> buttons.



1. [Course details](#) . Gives details of a specific course.
2. [Student details](#) . Gives details of student training in a particular month.

## Course Details



You can set up or change existing details of a course using this option.

Course Details

Select if existing course  
Can Select an existing course from this drop down list

Course Navigation buttons

Course Title sample Course Start Date 10/01/96

Location Guildford College Finish Date 17/01/96

Training Description Sample

Estimated Total Course Cost £100.00

Course Type External Taught Actual Total Course Cost

Overall Review Rating

Course Manager

Title	First Names	Surname
Mr	Gerald	Feltham

Course Details / Students Allocated / Tab bar

To add a new course press the <+> button on the navigation bar.

To add students to the course select the Students Allocated tab on the Tab Bar.

sample 10/01/96 to 17/01/96

Select to add new student Add student from drop down list

Delete Delete Current highlighted employee from list

Title	First Names	Surname	Expected Outcome	Actual Outcome
Mrs	Geraldine	Greaves	Students on course 'sample'	
Mr	John Raymond	Smith		

You can add additional students to the list by selecting them from the drop down list.

If you want to delete a student from the list press the <Delete> key to erase the current selected record.



# Monthly Training Commitments



You are able to view all employees engaged on courses for the month of your choice.

Students Training this month

Select order in which you wish to see records [Display Box](#)

Department, Section, Surname, First Names

Year movement

OK Cancel Print Report

Titles January,96 Month movement

Department	Section	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			
		M	Tu	W	Th	Fr	Sa	Su	M	Tu	W	Th	Fr	Sa	Su	M	Tu	W	Th	Fr	Sa	Su	M	Tu	W	Th	Fr	Sa	Su	M	Tu	W	Th	Fr	
Finance																																			
	Greaves																																		
	Geraldine																																		
Purchasing and Supply																																			
	Smith																																		
	John Raymond																																		

Student course allocations

1. sample Course  
List of courses for this month

Using the display box you can view records by either surname, first names or Department, Section, surname, firstnames.

Use the navigation buttons to move forward or backward a month or year.





## Employee Appraisal




**Appraisal Form**

Appraisee: **Trammas** Rating:   
Nigel; Sales Manager (South) Status point on grade: **1**

Appraiser: **Christ**  
Janine; Marketing Director

Interview Date: **19/01/1998**   History  

Targets set 

To complete CIM examinations this year ( Finals Oct 1998).  
To complete all appraisals by end July 1998.  
To achieve 8% growth on Southern Sales Team 1997 gross sales.  
To achieve >80% attendance at Regional sales meetings.

Action Plan

Complete CBT course and revision course.  
Plan and appoint appraisals by end of February.  
Increase amount of accompaniment and training 'in the field'.  
Invoke a 'no excuses' policy for regional meeting days.

Offers the opportunity to enter outcomes from the appraisal interview. Buttons offering other appraisal information include:

[Print Form](#)

[History](#)



## **Appraisal Print Form**

Goes into the report generator and shows the appraisal forms.

## **Appraisal Print Info**

Produces a list of previous appraisals for this employee.

## Appraisal History



Is used in the same way as discipline history .

Gives a full list of previous appraisal records. If you wish to view/change the Action Plan or Targets fields simply double click the mouse button in the field.

## Employee Discipline

Legal - Discipline

**Disciplinary Form**

Employee

Issued By  Warning

Witness

Issue Date

**Details of offence**  
Ms Northney did not achieve targeted sales in the last two months. In June 97 she achieved 68%, in July she achieved only 42%. In August she achieved 56%, including an £18,000 order (16%) that was recovered after the original Client Company went into receivership and was then aquired by the new Client. Now 64% of expected sales - year to date.

**Employee Explanation**  
Domestic problems have interrupted her concentration and commitment. The problem, concerning her partner's relocation overseas, is now resolved and Ms Northney is confident that she will exceed her years target inspite of this lapse.

**Future Action to be taken**  
Verbal warning given.  
90% of normal target set for September. Position to be reviewed at end of September. Closer supervision and support over remainder of 97.

Allows you to keep a record of any discipline meeting/interview carried out.

You can look at previous discipline records by selecting the [History](#) button. You can even change details by selecting the record you want to look at and then returning to the previous screen by pressing <OK> though this is not to be recommended - best to change them in the History screen. Be careful though for if you have just created a new record and have not completed entry you will have an incomplete record saved.

To print out a list of discipline records select <Print Info>.

To print out the standard Discipline form select <Print Form>.

## Discipline History

Legal - Discipline

**Discipline Details**

Surname: Northney      First Names: Paula      Title: Ms      Delete Record: -

Job Title: Sales Person Area 3       OK       Print      One Current Employee Only:  No

Issued By: Mr Nigel Trammes      **Allows records for one employee only**

Witness: Mr Jacob Forsyth

Interview date	Discipline Details	Employee Explanation	Discipline Action
26/08/1997	(Memo)	(Memo)	(Memo)
22/01/1998	(Memo)	(Memo)	(Memo)

Gives details of previous disciplinary action against this member of staff.

Double click on Outcome, Action or Detail cells to change these fields.

## Staff and External Grievance

**Grievance Form**

Complaint from  
 Internal  
 External

Internal Complaint

Freda; Sales Person Area 6

Date Acted on

Acted on by

Witness

**Details**

Raised a grievance over state of company car - pool vehicle, handed over as a temporary measure pending new lease contract.

**Action**

Ms Christ agreed vehicle was not of usual standard but explained the new lease company were a considerable improvement over the old one and worth waiting for. Agreed that vehicle should be valeted inside and out at the earliest opportunity.

Allows you to enter details of any grievance information relating to a specific complaint. If the complain is External then you should select External from the Complaint From box.

To view a history of previous grievances select [History](#).

To view and print Grievance forms select [Print Form](#).

# Grievance History

Legal - Grievance

**Previous Grievances**

OK Print Delete Record - One current Employee Only No

Title First Names Surname Postcode  
Mr Freda Smith WC2 7S

Acted on by: Ms Janine Christ  
Witness: Mr Jacob Forsyth

Interview date	Detail	Action
12/11/1997	(Memo)	(Memo)
20/01/1998	(Memo)	(Memo)

Gives information on recorded complaints made.

If you wish to look at/change previous Detail and Action double click the mouse in the relevant cell.

## Work Accident

This allows you to record all accidents that occur within the company. There are 4 pages for each accident and you can add, delete or move between accident records by use of the navigation buttons at the top of the form.

### ACCIDENT

The screenshot shows the 'Accident Log' application window. At the top, there is a navigation bar with buttons for back, forward, add, and delete. Below this is a tabbed interface with four tabs: 'Accident', 'Accident Details', 'Injury Details', and 'Witnesses'. The 'Accident' tab is currently selected. The form contains the following fields:

- Employee Name Select:** A dropdown menu with 'Beltrum' selected. Below the dropdown, the text 'Gordon Sales Representative' and 'Beltrum' is visible.
- Date of Accident:** A text box containing '01/01/1997'.
- Location of Accident:** A text box containing 'Works Stores'.

With a new record select the employee from the Employee Name Select drop down list. You need to enter a date when the accident occurred in the form Day/Month/Year and where the accident happened.

### ACCIDENT DETAILS

The screenshot shows the 'Accident Log' application window with the 'Accident Details' tab selected. The form contains the following fields:

- Employee Name:** 'Gordon Sales Representative' and 'Beltrum'.
- Activity Group:** A dropdown menu with 'Lifting and Carrying' selected.
- Hazard Group:** A dropdown menu with 'Poor Design of Equipment' selected.
- How accident occurred:** A text box containing the text: 'Put wide heavy load on trolley. Trolley became unstable and load fell on users foot.'

This page allows you to enter the type of activity the employee was involved in when the accident occurred and the Hazard type that was involved in the accident. These were created by carrying out a [risk assessment](#) .

You need to enter details of how the accident occurred.

### INJURY DETAILS



Accident Log

Accident | Accident Details | Injury Details | Witnesses

Gordon Belrum  
Sales Representative

Estimated cost of injury £1,000.00

Nature of Injury and Consequence  
Foot fracture. Likely to be off work for at least 3 weeks

Enter the description of the injury incurred by the employee and estimate how much you think it will cost to the company.

#### WITNESSES

Accident Log

Accident | Accident Details | Injury Details | Witnesses

Gordon Belrum  
Sales Representative

Witness Name  
Belrum

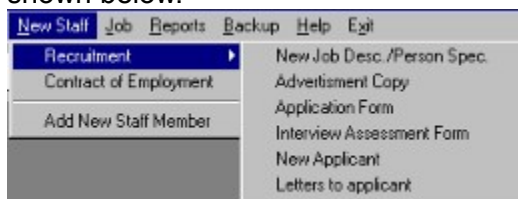
Witnesses  
Brian Bullshit - Sales Manager (South)  
Janine Christ - Sales Representative

Select witnesses to the incident from the witness name drop down list.  
Once all entries are completed you can end the session by pressing the <Close> button.

## New Staff



The New Staff menu gives you the opportunity to follow a recruitment process and add new members of staff to your organisation. The new staff menu and Recruitment sub menu are shown below.



The principal options are:

1. **Recruitment**. The recruitment process and documentation. Legal - Discrimination
2. **Contract of Employment** . Creating and editing a contract of employment for a new or existing member of staff. For an applicant who is offered a post you must transfer the applicant to your employee list to generate a new contract. Legal - Terms and Conditions of Contract
3. Add **New Staff Member** . Allows you to enter essential information for a new member of staff who has not been through the recruitment process.

## Staff Recruitment Process

Legal - Recruitment

The recruitment process sub menu of the New Staff main menu option gives you the following

options being careful to eliminate discrimination from any stage


Legal - Discrimination

1. New [Job Desc./Person Spec](#) or <Job Description and Person Specification> button. Allows you to create a new job description and person specification if the job has been newly generated.
2. [Advertisement Copy](#) or <Job Advertisement> button. Simple document creation utility to outline Advertisement information.
  1. Application Form. Produces a standard Application Form from a list of choices. Appears in the Report Generator for you to edit and print.
  1. [Interview Assessment](#) Form. Produces a standard Assessment form for selection interviews from a list of choices. Appears in the Report Generator for you to edit and print. The job description and person specification may give better guidelines about specific areas you want to find out about.
  2. New Applicant or <Applicants> button. Create/edit an applicant details on the database so that appropriate letters are sent to each applicant. [Letters to Applicant](#) covering application form, rejections, invitations and offers are set up here.

## Job Description and Person Specification Set Up



You can select any of the following tab boxes:

1. **Job**. The initial tab box allowing you to change job titles, location, hours and pay.
2. **Key Objectives**. Allows the entry of objectives relating to resources under the job control and people accountable to for results.
3. **Key Responsibilities**. Allows the entry of the resources the job is directly responsible for.
4. **Key Duties**. Allows the entry of tasks that have to be carried out to fulfill the objectives and responsibilities of the job.
5. **Person Specification**. Considers the essential and desirable qualities/skills/knowledge required by anyone carrying out the job. 
6. **Job Description**. Generates Job Description from the information entered in 2,3,4 above but does not save the resulting description to the database.
7. **Person Specification Report**. Generates Person Specification from the data entered in 5 above but does not save the resulting report to the database.

## Job Tab



Job Description/Person Specification

Job Look Up: Marketing Director

Job Title: Marketing Director

Department: Marketing

Section:

Period of Pay: M (D)Daily, (W)Weekly, (M)Monthly, (Y)Yearly, (P)Periodic

Weekly Hours: 40

Holiday Entitlement per Year (Days): 28

Copy Details from another job to current job

Grade: 2

Bottom Pay: £30,000.00

Top Pay: £40,000.00

Points on scale: 5

Overtime Rate/hour

Update Pay Scales

Fill in the form and enter the pay grade if you use them. If you need to create new pay grades or change the pay details press the <Update Pay Scales> button to produce the following form.

Pay Scales

Grade: 2

Points on Scale: 5

Bottom Pay: £40,000.00

Top Pay: £50,000.00

Overtime Rate / hour

Use the navigator buttons to add and delete new pay scales and edit pay as necessary. Press the <OK> button when complete. Using pay grades reduces the risk of pay discrimination on the grounds of sex, race and disability.

## Job Key Objectives Tab



Consider the resources the job owner will have direct affect upon. For each resource press the corresponding Select Resource check box. Consider the people the job owner is accountable to and check the corresponding Select Accountabilities box.

Now consider against each box what are the key objectives e.g. for the people resource - To maintain the present level of performance from staff. To enter the objectives you press the View/Edit circle box next to the resource or accountability.

If you already have information entered you will get an edit panel appear which allows you to enter text relevant to the resource/accountability. Once the entry is complete press the <OK> button.

Note that if you insert a new edit record the *Item Number* is increased. When saved this will mean that all objectives will be related to this number i.e. different number edits will not appear related to this job. You can reset to the previous number by moving to another number in the edit box using the navigation buttons.

## Job Key Responsibilities Tab



Consider the resources the job owner will have direct affect upon. For each resource press the corresponding Select Resource check box. Consider the people the job owner is accountable to and check the corresponding Select Accountabilities box.

Now consider against each box what are the key responsibilities e.g. for the people resource - the number of staff directly and indirectly reportable to the job owner. To enter the responsibilities you press the View/Edit circle box next to the resource or accountability. This works in the same way as for [Key Objectives](#) .

Note that if you insert a new edit record the *Item Number* is increased. When saved this will mean that all objectives will be related to this number i.e. different number edits will not appear related to this job. You can reset to the previous number by moving to another number in the edit box using the navigation buttons.

## Job Key Duties Tab



**Job Description/Person Specification**

Job | Key Objectives | Key Responsibilities | **Key Duties** | Person Specification | Job Description | Person Specification Report

**For Resources under Control**

Select Resources

- People
- Buildings
- Equipment
- Money
- Information
- Other

View/Edit

Section: People Duties

Sub Headings: Financial Director      Item Number: 1

Produce end of month and end of year financial statements  
Set staff targets and organise workloads

[Edit Box](#)

**To Accountable People**

Select Accountabilities

- Direct Supervisor
- Internal Customers
- External Customers

View/Edit

Consider the resources the job owner will have direct affect upon. For each resource press the corresponding Select Resource check box. Consider the people the job owner is accountable to and check the corresponding Select Accountabilities box.

Now consider against each box what are the key duties to be carried out to satisfy the corresponding objectives and responsibilities e.g. for the people resource - Carry out weekly reviews of staff performance with the team. To enter the duties you press the View/Edit circle box next to the resource or accountability. This works in the same way as for [Key Objectives](#) . Note that if you insert a new edit record the *Item Number* is increased. When saved this will mean that all objectives will be related to this number i.e. different number edits will not appear related to this job. You can reset to the previous number by moving to another number in the edit box using the navigation buttons.



## Person Specification Tab

Legal - Discrimination

Job Description/Person Specification

Job | Key Objectives | Key Responsibilities | Key Duties | Person Specification | Job Description | Person Specification Report

	Financial	Mandatory	Discretionary
Physical		<input type="checkbox"/>	<input type="checkbox"/>
Attainments		<input type="checkbox"/>	<input type="checkbox"/>
Intelligence		<input type="checkbox"/>	<input type="checkbox"/>
Special Aptitude		<input type="checkbox"/>	<input type="checkbox"/>
Interest Types		<input type="checkbox"/>	<input type="checkbox"/>
Disposition		<input type="checkbox"/>	
Circumstances		<input type="checkbox"/>	

Double Click on Boxes to edit and close

Number crunching type hobbies.  
Used to socialising with different class

A person specification is a description of the necessary and desirable qualities, skills and knowledge required from the job holder to successfully carry out the work. Before completing this it is probably worth looking at the [job description](#) generated using the next tab.

The list of characteristics shown cover:

[Physical](#). [Interest Types](#).  
[Attainments](#). [Disposition](#).  
[Intelligence](#). [Circumstances](#).

[Special Aptitude](#).

Decide against a specific characteristic what qualities, skills, knowledge are essential (Mandatory) or desirable (Discretionary). By double clicking on the small box corresponding to the Mandatory/ Discretionary characteristic you can edit the text (as used in the example above for Discretionary Interest Types). Once you have completed entry you can decrease the size of the edit box by double clicking the mouse inside the box.

## **Physical**

Consider whether the member of staff has to carry out manual jobs or is in a high stress position. Health can be a major concern in many jobs and should be expressed in this section. Appearance may be essential to certain jobs e.g. sales.

## **Attainments**

Consider the qualifications and background experience necessary to do the job properly.

## **Intelligence**

You may decide that the job holder needs to demonstrate how well they can deal with logical problems and analysis of situations.

**Special Aptitude**

Any special skills the job holder needs to carry out the job e.g. numerical, literate, creative, logical, etc..

### **Interest Types**

Any areas that would help the job holder carry out the work e.g. Hobbies, interests, reading matter, societies, charities, etc.

## **Disposition**

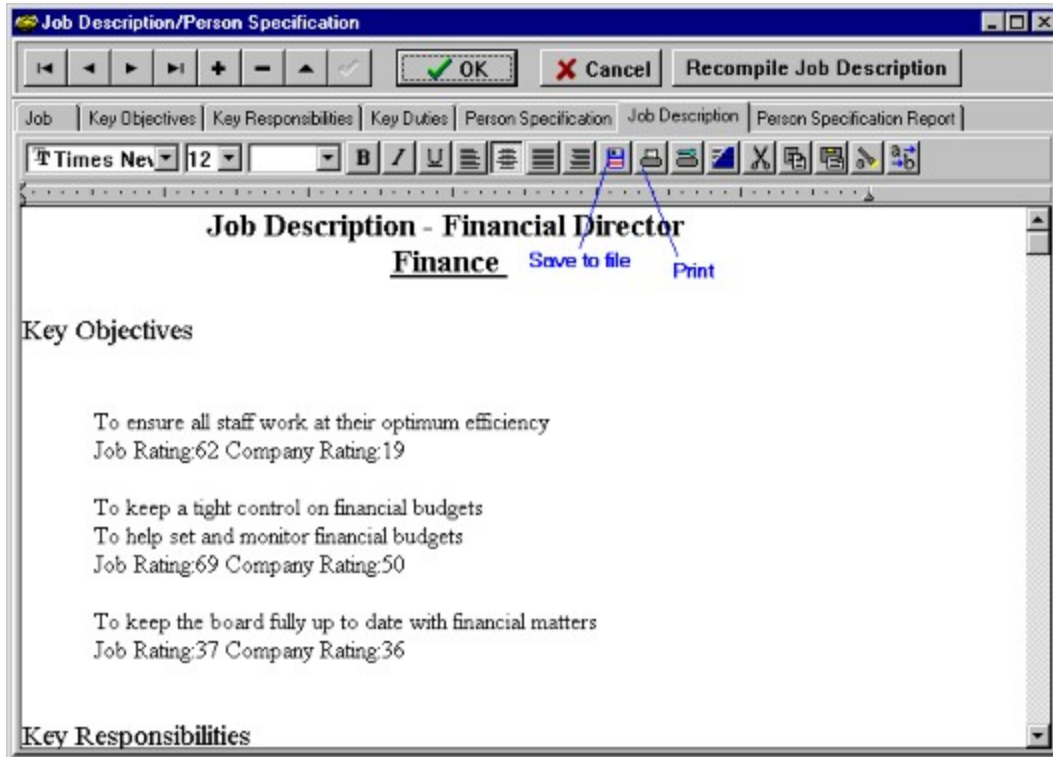
Consider the general demeanor of the person and their level of motivation. How should they behave with other people - subordinates, peers, managers, customers, suppliers etc.

**Circumstances**

Single, married, family, working hours availability, out of hours availability, transport, financial commitments, etc.



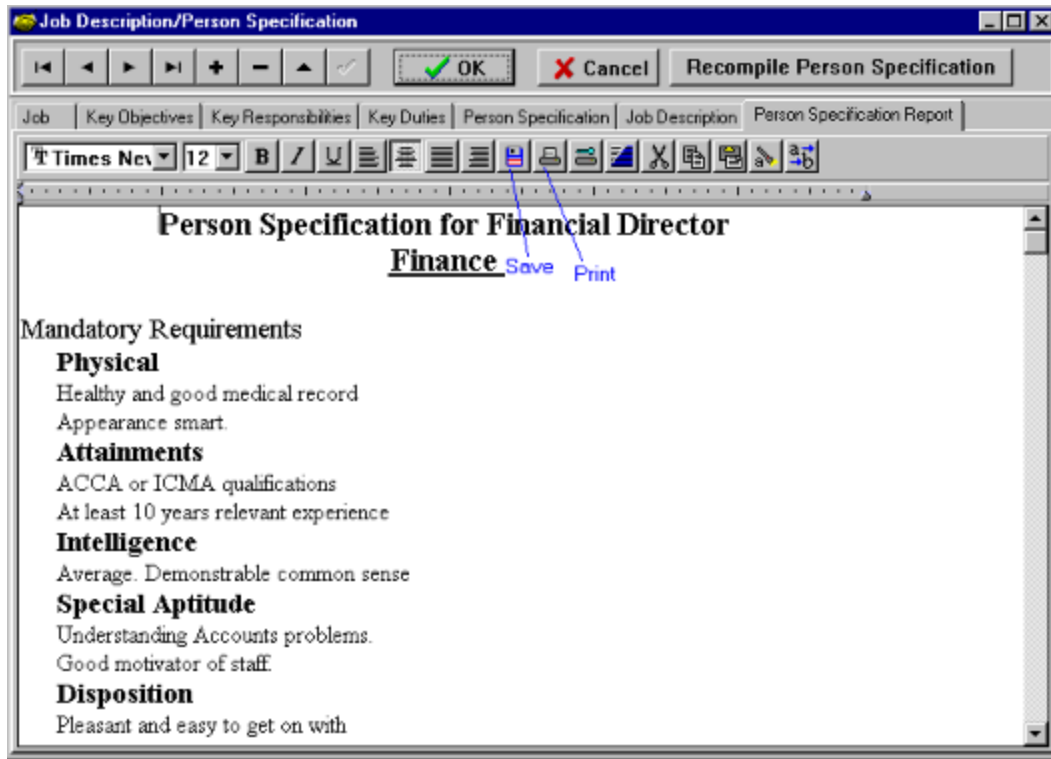
## Job Description Tab



This is automatically produced from the entries you created for Key Objectives, Key Responsibilities and Key Duties. It includes any ratings for the importance you have placed on the characteristic to the job holder and to the company. This can be useful for assessment of the job holder and aids in the setting of job priorities.

You can edit the document and print it using the print icon. The document is not saved and must be saved as a separate file using the save icon.

## Person Specification Report Tab



This is automatically produced from the Person Specification entries. You can use this to help identify requirements for a job applicant or for areas the job holder needs to develop in. You can edit the document and print it using the print icon. The document is not saved and must be saved as a separate file using the save icon.

## Job Advertisement



The advertisement copy can be automatically set up by using this form.

You should select the job, department and section by pressing the <Select Job> button or using the navigation buttons. Press the <Regenerate Master Document> button to start the merge facility. You then are asked to select the employee who will be receiving applications from a drop down list.

You will probably need to edit the document to clear out and add relevant information and amend any clear mistakes.

If you wish to print the result press the Print menu option or <print> button.

If you would like to save the advert to a file select Export from the File menu.

If you would like to import a RTF format file then you select Import from the File menu.

You can move between previous adverts by using the Advert Navigator buttons.

Select Exit from the File Menu to return to the main menu.

## Letters to Applicants and Applicant Details



Allows you to set up and send applicant related documents.

Applicant Process

Correspondence Contact

Select Applicant  Taylor Who applicant deals with in company

Applicant Navigation buttons

Job Title

Financial Director Job applied for

Finance

Surname: Smith

First Names: Imelda

Address Title Mrs Initials: I

43 The Larch  
Wimbledon  
London

Telephone(Home) 0171 734567

Telephone(Work)

Postcode SW1 5TY

Send Letter	Offer	Edit Letter
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Edit Letter"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Edit Letter"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Edit Letter"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Edit Letter"/>

Interview Date Interview Time

Interviewers

1. Smith 6.

2. Greaves 7.

3. Harmour 8.

4.  9.

5.  10.

Employees to act as interviewers

1. You should start by selecting the job the person is applying for and the contact individual within the company that correspondence will be with.
1. Now enter the details of the applicant that you know.
1. You can now decide what sort of correspondence you are sending to the applicant. Tick the Send Letter box next to the correspondence you are sending (a grayed box does not have a selection).
1. To print the letter or letters press the [Send Letters](#) button after you have saved the current record using the <> button on the Applicant navigation buttons.

## Send Letters



The dialog box is titled "Send Letters" and is set against a light gray background. It contains two main sections, each enclosed in a rounded rectangular frame. The first section, "Choose letter type to send", has four radio button options: "Application letter" (selected), "Response letter to application", "Interview outcome letter", and "Joining Instructions". The second section, "Select letters to be sent", has two radio button options: "All current letters relating to job" (selected) and "One applicant letter". Below these sections is a "Date to send" label followed by a text box containing "01/05/97". At the bottom are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

Allows you to select the letter stage relating to the job by pressing the click box and select whether you want a relevant letter printed for each applicant or just for the one you have been working on.

When you are happy press the <OK> button to merge the letters in the report generator.

## Selection



Legal - Recruitment

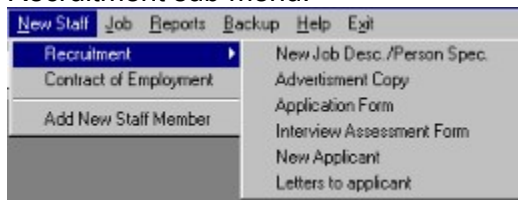
To select the right candidate consider the process outlined below.

1. Prepare a job description and person specification.
1. Check the applications against the person specification to help draw up a short list.
1. Use the similarities and differences between the applicant and the ideal candidate to draw up a list of areas you would like to ask about at interview. Use the application form and job description/person specification to help here.
1. Take in to the interview an objective list of criteria to help you assess candidates. These criteria may be taken from the person specification and/or from a formal [Interview Assessment](#) form.
1. At the interview it is useful to have more than one interviewer so that you can compare notes afterwards.

## Interview Assessment Form



To print a pre-prepared interview assessment form select Interview Assessment Form from the Recruitment sub menu.



You will enter the Report Generator where a list of forms appear in the [Form box](#) . Select a form headed Interview Assessment and edit/print as required

## New Staff Member

Legal - Recruitment

You can enter new employees by selecting Add New Staff Member from the New Staff Menu option.



You should have a job ready to allocate to this member of staff. If you have not yet created the job then you need to select the [job main menu option](#).

You will be shown the form below into which you can enter initial details of the employee and any current job they are employed to do.



Version 1 has a different layout allowing you to enter job title, department and section.

When you save the employee initial details you will go to the Employee Record form and allowed to enter further details.

[Employee Record Entry](#)



## Job



The job menu

1. Description/Person Spec.

- A. New or <New Job> button. You go to the same form as the existing job form except you start with a blank record.
- B. Existing or <Job Description and Person Specification> button. This automatically produces a job description and person specification which can be updated and printed.

1. Conditions or <Job Specific Conditions> button. Gives you the opportunity to set up standard terms and conditions of contract for the specific job.

A Staff Handbook job has been created to offer a standard handbook of conditions for all jobs. You can create standard conditions for this job and print them out using the Contract Conditions in the Company menu. Doing things this way means you do not have to merge the standard job terms and conditions into the employee contract but must remember to accompany the employee contract with the standard handbook.

## Special Job Conditions



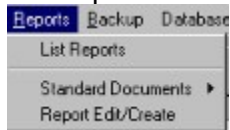
Using the Company Statement and Job Contract word processor you are able to set up specific conditions for each job.

After selecting the job you can simply type in the special conditions in the Job window or copy them from the Condition records.

## Reports



The reports menu offers the following options.



There are 2 types of report available – List and Form.

**List** This gives you standardised reports offering a list of selected records. It is particularly useful for producing monthly reports on employee activity or just employee|Job information.

**Form** This is particularly useful for standard letters and documents. You can customize each report to fit in with your company style. Records are merged with the reports as specified by the user or standard selection criteria set up by the program. The creation of new documents is carried out through the Report Generator.

1. **Report Lists**. Allows you to print pre-defined personnel reports by selecting from a tree of available reports.
2. Standard Documents - **forms** allows you to view, edit and print forms in the report generator.
3. **Report Create/Edit**. Report generator for most reports used in Personnel. This does not restrict the range of documents to look at as per the previous 2 options.

In addition you may wish to view and change terms and conditions of contract for a **job** or for an **employee**.

## Report Lists



By selecting this option you are able to select the type of list report you wish.



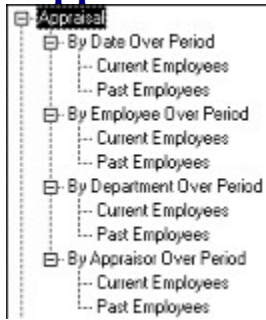
When you select reports you will be given the opportunity to select records between periods and by categories if you wish. Otherwise all records are selected.

You are sometimes given the option to select a specific record by a value kept in the drop down box below.

If you wish to do this then select the value from the drop down list or ignore if you wish to select all.

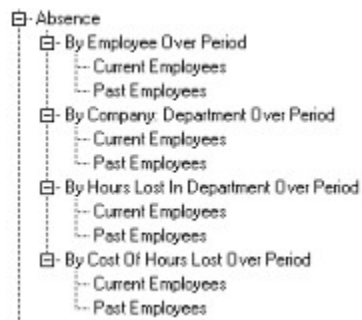
If you wish to create/edit a custom built report select the  [button](#) .

# Appraisal



1. By Date Over Period. Offers a list of appraisals carried out over a given period.
1. By Employee over Period. Offers a selection of appraisals between specific dates and you can select a specific employee from the employee list.
2. By Department over Period. Offers a selection of appraisals between specific dates and you can select a specific department from the department list.
1. By Appraiser over Period. Lists appraisals for the person doing the appraisal over a specific period. You can select a specific appraiser from the Employee list or just print all.

## Absence



1. By Employee over Period. Offers absence records between specific dates and you can select a specific employee from the employee list.
1. By Company, Department over Period. Offers absence records between specific dates and you can select a specific department from the department list.
2. By Hours Lost in Department Over Period. Gives a list of total hours lost by employees within specific departments by absence type.
1. By Cost of Hours Lost in Department Over Period. Gives a list of the real cost of absence over a period as in 3 above. Pay rates per hour are worked out on total possible hours a member of staff can work including holidays.

## Discipline

Legal - Terms and  
Conditions of Contract

1. By Date Over Period. Offers a list of discipline interviews carried out over a given period.
2. By Employee over Period. Offers a selection of discipline interviews between specific dates and you can select a specific employee from the employee list.
3. By Department over Period. Offers a selection of discipline interviews between specific dates and you can select a specific department from the department list.

## Employment Costs

- ☐ Employee Records
  - ☐ Current Employees
  - ☐ Past Employees

1. Current Employee Cost Loss Through Sickness Over Period. Offers a summary of each employees absence days and the cost of those days. It is based on an hourly rate set by the number of hours an employee is contracted to work in a year.
1. Current Employee Pay. Shows the employee rates used in each department based on total contracted hours per year.

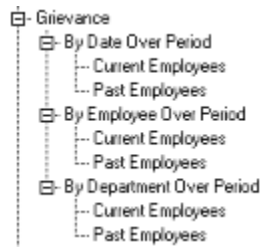


## Employee Turnover



1. New Employees Over Period. Gives a list of new employees who have joined the company over the designated period.
1. Leaving Company Over Period. Gives a list of employees who have left the company over the designated period.

# Grievance



1. By Date Over Period. Offers a list of grievance interviews carried out over a given period.
1. By Employee over Period. Offers a selection of grievance interviews between specific dates and you can select a specific employee from the employee list.
2. By Department over Period. Offers a selection of grievance interviews between specific dates and you can select a specific department from the department list.

## Job Applicants

[-] Job Applicants  
    [-] By Job Over Period  
    [-] By Department, Section Over Period

1. By Job Over Period. Gives a list of people applied for jobs over a specific period. You can look at just one job by selecting the job from the job list.
1. By Department, Section Over Period. Gives a list of people who have applied for jobs by department/Job. You can look at just one department by selecting department from the department list.

## **Pay Structure**

Gives a list of pay grades and rates.

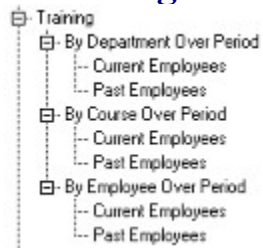
## **Current Race Breakdown**

Splits employee numbers within the company by racial type.

## **Current Sex Breakdown**

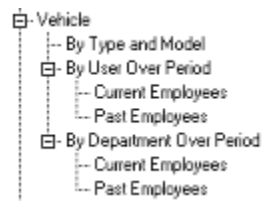
Splits employee numbers within the company by sex type.

## Training



1. By Department over Period. Shows the training carried out by employees in each department between the specified dates. You can select a specific department from the department list.
2. By Course over Period. Shows the training carried out by employees on each course between the specified dates. You can select a specific course from the course list.
1. By Employee over Period. Shows the training carried out by employees between the specified dates. You can select a specific employee from the employee list.

## Vehicle



1. By Type and Model. Gives a picture of the vehicles currently kept by the company.
1. By User Over Period. Shows a list of employee useage of vehicles over a specific period. You can select a specific employee from the employee list.
1. By Department over Period. Shows a list of employee useage of vehicles within each department over a specific period. You can select a specific department from the department list.



## **Employee Records**

Gives a breakdown of the employee/ job details for each employee. You can select an individual employee from the employee list.

## **Work Telephone List**

Gives a list of employee work telephone numbers in employee order.

## Accidents

Legal - Terms and  
Conditions of Contract

1. Summary over Period. Offers a list of all accidents recorded over a specified period with there estimated costs to the company.
1. By Employee over Period. Lists one or all employee accidents that have taken place over a period.
2. By Accident Type over Period. Shows all accidents that have taken place over a period for specific Activity groups.
3. By Hazard Type over Period. Shows all accidents that have taken place over a period for specific Hazard Groups.

## Risk Assessment

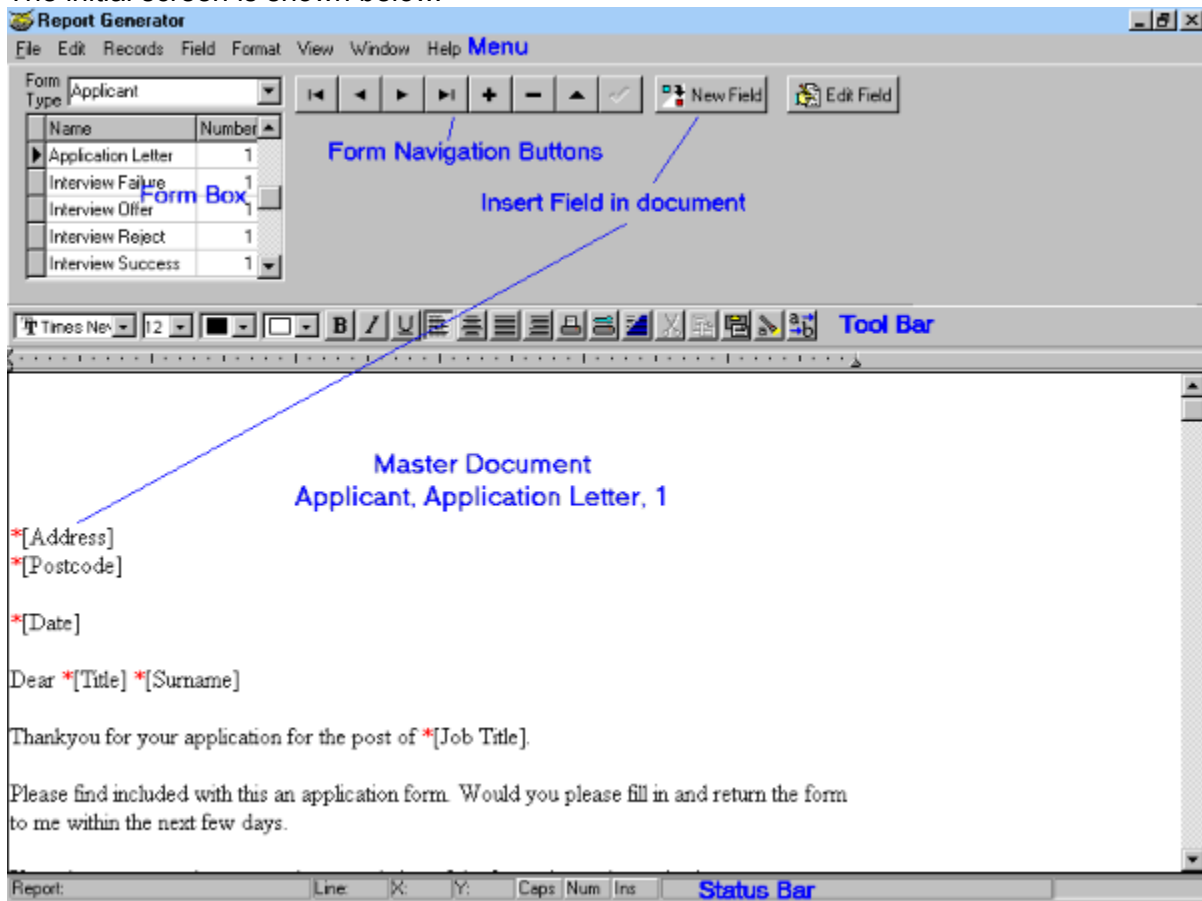


1. Summary Report. Gives full listing of all risks assessed within the company and the overall estimated costs of reducing the risk.
1. By Accident type. Lists Activity Groups and there related risks.
2. By Hazard type. Lists Hazard Groups and there related risks.

## Report Creation and Editing



The report generator is a fully operational word processor with the ability to merge records from a number of database tables. You can create reports using other word processors provided you save them in rich text format (rtf). These can then be loaded into the report generator and record fields added as required. The report generator can be activated by choosing Reports|Report Edit/Create from the main menu or pressing the <Editing/Creating Reports> button. The initial screen is shown below.



This consists of report headings, wp menu and a tool bar (items marked in blue on the illustration). There are key elements in the creation or editing of the report.

1. Overview of [Report Use](#) .
2. Typing the [New Report](#) .
3. Locating an [Existing Report](#) .
4. Entering the [Report Outline](#) .
5. Entering [Table Fields](#) .
6. Selecting records to [Merge](#).
7. [Printing](#) the merged document.

The mechanism used for adding fields and selecting records revolves around the use of the SQL language. This language is a standard for manipulating databases and you should take care when changing any of the automatically produced SQL code. Most of the standard reports used by this Personnel System are generated using this report generator.

## New Report



You can create new reports by either

Pressing the **+** icon on the form navigator

Or

Selecting **File|New** from the form main menu.

Or

Selecting **Records|New** from the form main menu.

You will see the dialog shown below.

**New Report**

Report Type  
Applicant

Report Name  
Applicant Letter

Report Number  
1

OK

Enter the name of the form and a number for the issue of the form then press the **<OK>** button.

Once you have created your new report you can edit the name and number by either double clicking the mouse button on the highlighted record in the Form Records Name and Number box (shown below) or simply click the mouse button in the Form Record Name and edit inside the box.

Name	Number
Application Letter	1
Interview Failure	1
Interview Offer	1
Interview Reject	1
Interview Success	1

## Existing Report



There are 3 ways in which you can locate the specific record you require.

- 1 Move to the record using the Form Records Name and Number box.
- 2 Using the Records| First,Previous,Next,Last from the form main menu.



- 3 Using the Navigation buttons.



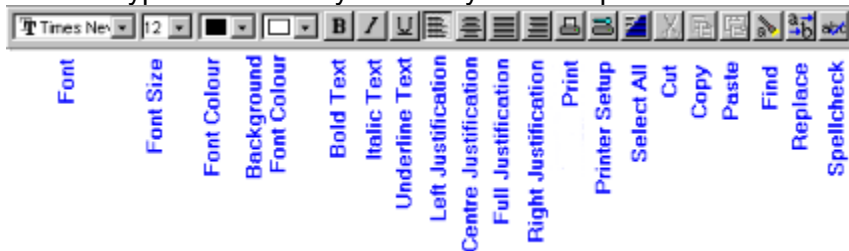


## Report Outline



The document takes up the whole of the printed page. Left, right, top and bottom margins are not initially set. This is to allow you to fill the page if desired.

You can type text normally and carry out manipulation of the text style by using the toolbar.



To change paragraph characteristics or insert a table choose **Format** from the menu.

Cut, copy and paste text works in the same way as other windows word processors. You can use either the edit menu or the icon buttons on the toolbar.

To search and replace text use the icons on the toolbar.

In addition you may require headers and footers which will appear on every page. To select headers or footers choose the View|Header or View|Footer from the main menu. This produces a box above (header) or below (footer) the document in which you can enter the necessary text. Once complete you can turn of the header or footer by selecting the same menu option again or simply press the mouse button inside the main document.



If you wish to enter automatic page numbers for your header/footer you can use the Field|Insert Page Number option from the main menu.

## Report Table Fields



You can enter table fields so that merged documents have the relevant employee/company entries. Field entry can be in 2 formats:

1. **Single entry Fields** . This means that each field value is replaced by the record entry for that field when merged. One field value per merged document.
2. **Multiple entry Fields** . This means that a table of records can be incorporated in the document as a table or chart. To this can be added formulae for manipulating the data transferred. Merging the document has no effect on Multiple entry fields.

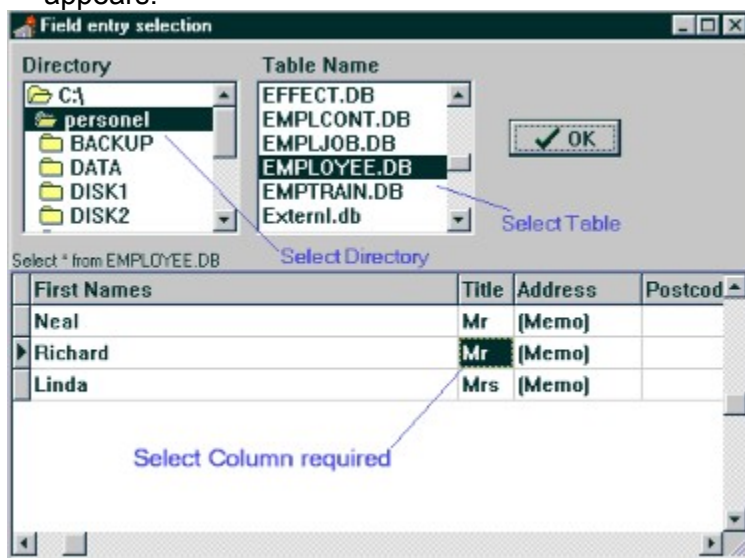
For the majority of applications you will only need the single entry fields. The multiple entry fields are more useful for statistical and summary reports.

## Single Entry Field



To create a field entry in your document:

1. Move the cursor to where you want the field entry.
1. Select the **<New Field>** button or Field|New from the main menu. The following screen appears.



1. If the table is not found in the current directory use the Directory box to move to the correct directory.
1. Select the table from the Table Name Box.
1. The columns represent the table field entries. To select the field choose any cell in the field name column.
1. Press the **<OK>** button to insert the new field entry. All field entries in the main document will be prefixed with \*. The field name will be included in the [ ] brackets.

To delete a field entry you must select the whole of the field entry including the \* then press the **<Delete Field>** button. Please do not delete the field using any other method as this will cause problems when merging the document.

To use a special field such as the current date or page number you will need to add these fields using the **Field|Insert Date** and **Field|Insert Page Number** main menu items. Note the page number can only be inserted when either the header or footer is showing.

## Multiple Entry Table



You will use an OLE object to create tables/charts called QueryX. This is used to create tables from database records which can then be manipulated in the spreadsheet table and transferred to the chart.

To create the QueryX table move the cursor to where in the document you want the table/chart to appear then select Edit|Insert OLE Object from the main report generator menu.

Legal - Terms and  
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Select **Query Spreadsheet/Chart Control** from the OLE dialogue then press the <OK> button.

A small box appears which you may wish to resize before starting.

*The spreadsheet automatically resizes when data from databases are set up on the spreadsheet and you can also make the spreadsheet resize by choosing the right button menu option **Spreadsheet/Resize Spreadsheet**.*

You can manually resize the box by double clicking in the box.

The following operations are available:

1. Create table data for spreadsheet.
2. Create/edit the chart from the spreadsheet data.
3. Enter and editing spreadsheet formulae and data.
1. Print spreadsheet/chart .

You would normally start by creating the table data. After this the other 3 operations become useful.

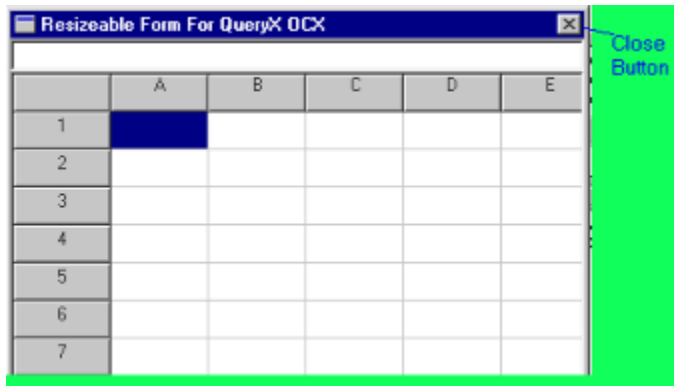
All these facilities are accessible by pressing the right mouse button. A pop up menu appears which offers the required selection.

You may wish the spreadsheet to appear on your page without the Cell references and edit box appearing above the grid otherwise they will be printed. Select Hide Edit Screen from the right mouse button menu.

Once you have completed your entries be sure to save the document containing the QueryX object. The document is not automatically updated.

## Manual Resizing of Spreadsheet/Chart

If you wish to manually resize double click the left mouse button anywhere inside the QueryX box. Another Box appears which can be resized by placing the cursor at the bottom right corner then pressing the left mouse button and dragging the cursor. The box will resize. You can edit the spreadsheet within this box or move back to the original box by pressing the x button in the top right hand corner of the box. *It is preferred that you do not use this facility unless absolutely necessary.*

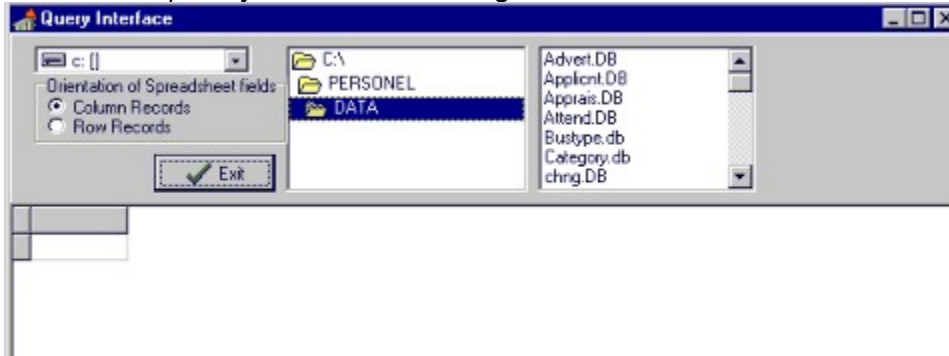


## Creating the Spreadsheet Query

Press the right mouse button while in the spreadsheet or chart. A pop up menu appears.



Select Show|Query to reveal the dialogue below.



If no tables appear in the table list box you will need to move to the relevant directory of the table using the drive and directory boxes.

Once you are in the relevant directory select the table(s) you wish to use (multiple tables are selected by keeping the <Ctrl> key pressed whilst making your selection with the mouse).

Multiple table selection results in the appearance of the [<Set Link>](#) button. Depress this to select the common field between any two tables. The box that appears is similar to the one for linking tables in the report generator.

A list of entries for that table(s) appear together with the button **<Connect>**.

It is useful to connect the table with the query mechanism and allow field selection in the table so press the [<Connect>](#) button. **You must select fields in order for the merge to be successful.**

You may wish to restrict your selection or set fields for merging. You can do this by selecting entries for the [Master Field and Merging Field](#).

Before returning to the spreadsheet decide whether you want the records to appear in rows or columns. Press the [Orientation of Spreadsheet Fields](#) buttons to choose.

Once completed you are ready to see the result. Press the **<Update Grid>** button.

When you are happy to carry out the transfer of data press the **<Exit>** button to return to the spreadsheet.

## Orientation of Spreadsheet Fields

The Orientation box offers 2 alternatives.

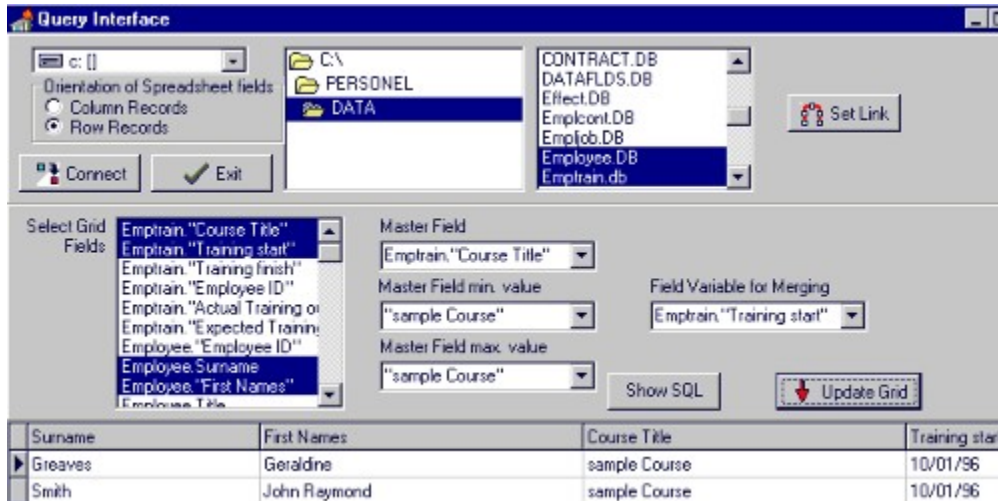


**Column Records** - Makes the records appear across the page. The first record in the second column, the second record in the third column, etc.

**Row Records** - Makes the records appear down the page. The first record in the second row, the second record in the third row, etc.

## Improving the selection

The screen now appears with the ability to select fields you want in your table and any selection criteria.



The screenshot shows the 'Query Interface' window. At the top, there is a file browser showing 'C:\PERSONEL\DATA'. To the right, a list of databases is shown, with 'Employee.DB' and 'Emprain.db' selected. Below this, there are 'Connect' and 'Exit' buttons. The main area is divided into two sections: 'Select Grid Fields' and 'Master Field' configuration. The 'Select Grid Fields' section has a list of fields including 'Emprain.'Course Title', 'Emprain.'Training start', 'Emprain.'Training finish', 'Emprain.'Employee ID', 'Emprain.'Actual Training on', 'Emprain.'Expected Training', 'Employee.'Employee ID', 'Employee.Surname', and 'Employee.'First Names'. The 'Master Field' section has dropdown menus for 'Master Field' (set to 'Emprain.'Course Title'), 'Master Field min. value' (set to 'sample Course'), and 'Master Field max. value' (set to 'sample Course'). There is also a 'Field Variable for Merging' dropdown set to 'Emprain.'Training start'. At the bottom right of this section are 'Show SQL' and 'Update Grid' buttons. Below the configuration is a table with the following data:

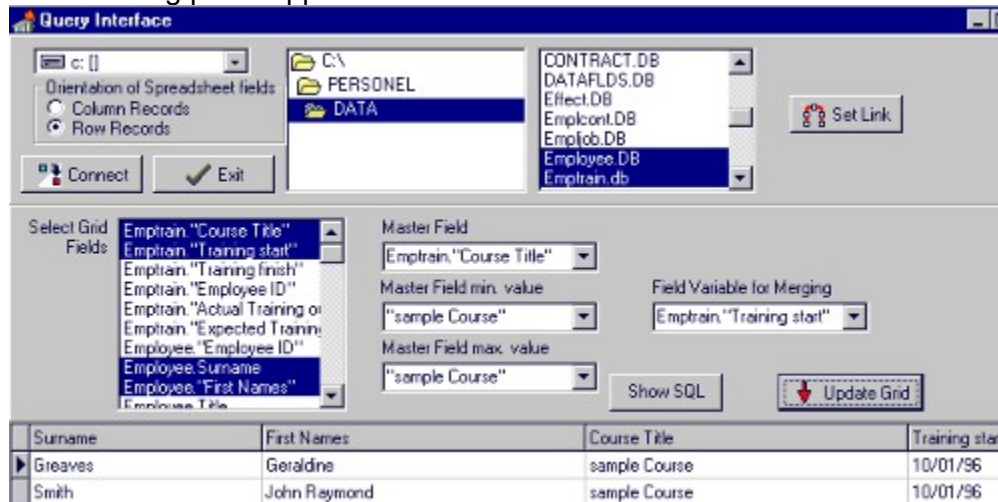
Surname	First Names	Course Title	Training start
Greaves	Geraldine	sample Course	10/01/96
Smith	John Raymond	sample Course	10/01/96

To select individual fields to appear in your table press the mouse in the Select grid fields box on the field you want to appear and by keeping the <Ctrl> key depressed you can make multiple selections. Each field appears in the table in the order you select. If you do not select any fields then the merge will not be successful.



## Merging fields

The following panel appears.



The **Master Field** entry must contain the field you wish to select the records by. Select the field you wish to use by pressing the button next to the entry point. A selection of fields appear as a drop down list from which you can select the relevant field name.

Next the range of records can be set by using the **Master Field min value** and **Master Field max value** drop down entries. The minimum value is set by selecting the value in the **Master Field min value** entry. The maximum value is set by selecting the value from the **Master Field max value** entry. If you decide to merge documents then the field min and max values are replaced with the relevant record values from the main document. This allows you to update the OLE object for each record when merging.

You can also set a **merging field** whose values are selected from the currently merging document.

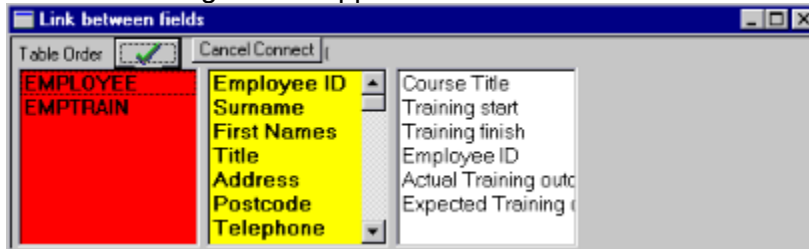
For Example:

If you want to have a list of employees who have attended a specific course you would set up course details on the main document and set up the inserted spreadsheet with the Master Field=Course Title and the Merging Field = Training Start.

*Note that you must include fields specified in the master field and merging field in your select grid fields box.*

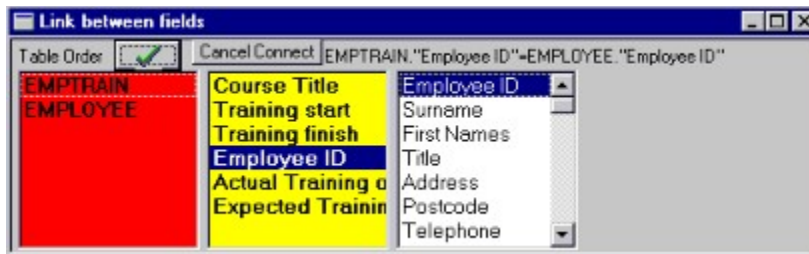
## Linking Tables

The following screen appears.

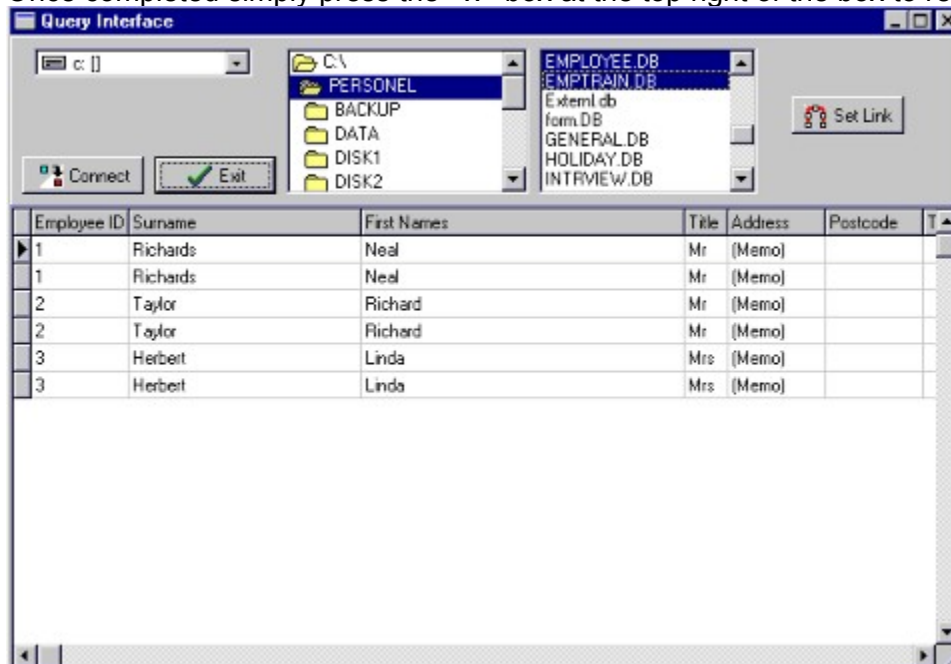


You can re-order the tables so that links between fields are more clearly defined by simply moving the table in the left box to the desired location.

You select a field in one table by clicking the field in the table. You then select the linking field in another table by clicking on it.

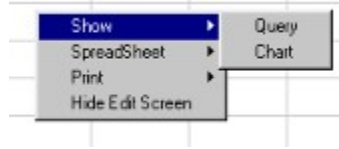


Once completed simply press the <x> box at the top right of the box to return to the Query form.

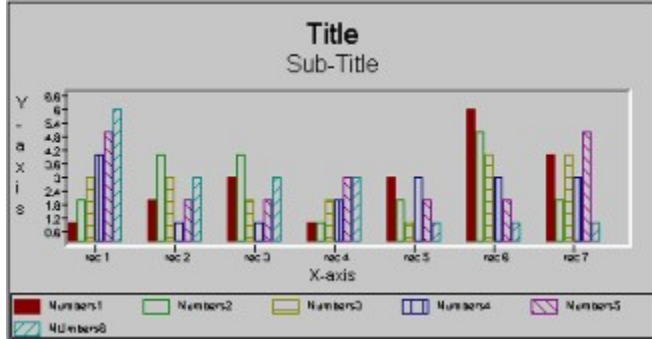


## Using the Chart

Once you have produced the spreadsheet data you can view the chart produced by pressing the right mouse button inside the QueryX spreadsheet to produce a pop up menu.



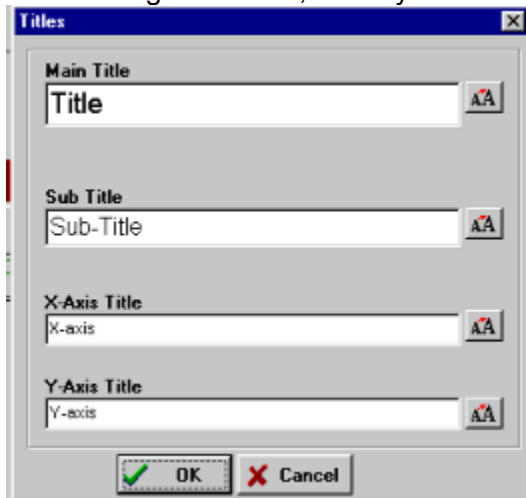
Select Show|Chart and a chart such as the one below is shown.



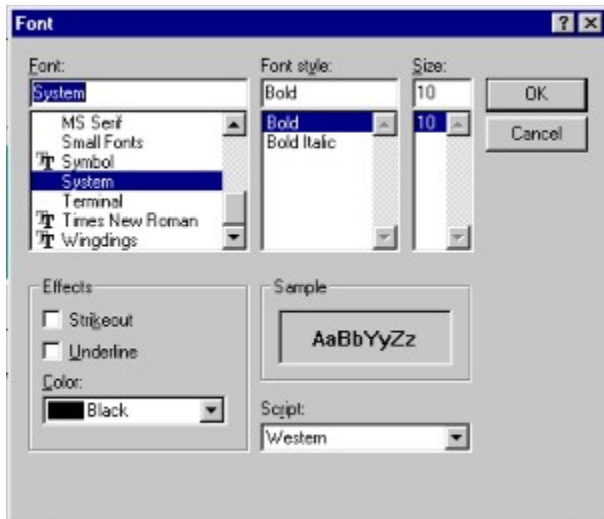
You can change qualities of the chart using the pop up menu options:



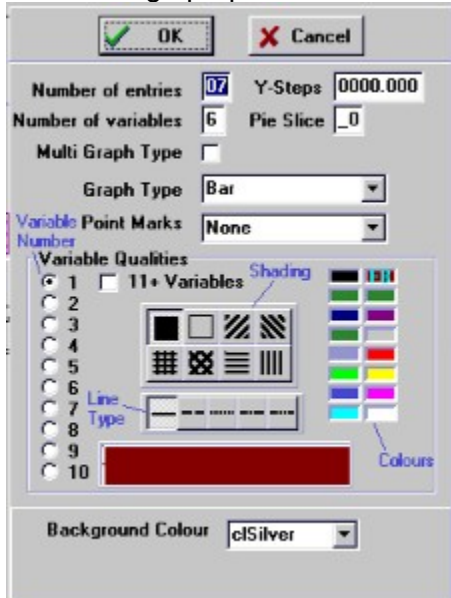
1. To change the main, x and y titles select Chart|Titles.



Fonts can be changed for each title by pressing the <Font> button.



1. To change properties of the Chart select Chart|Properties.



You should not need to change the Number of entries or number of variables as these are automatically set. Operations available include:

- 1 Allowing one graph type for all variables or a separate graph type for each variable. Press the **Multi Graph Type** cell to allow multiple types.
  - 2 The graph type (bar, line, pie etc.) are selected from the drop down list marked **Graph Type**. If you have **Multi Graph Type** selected then you can specify which variable to use by pressing the cell corresponding to the variable number (marked 1 to 10 and 11+ for variable numbers over 10).
  - 3 **Point Marks** defines the marker used on line graphs to represent a particular value. Again this can be used for all or individual variables dependent on the setting of **Multi Graph Type**.
    1. Shading for graph areas representing a variable together with line types and area colour can be set for each variable using by setting them for each variable number. Select the colour, line type and shading for each variable by pressing the left mouse button on each selection.
    1. The background colour for the graph as a whole can be chosen from **Background**

**Colour.** CIWhite is the best colour to use if your are printing your graph.

Once you have completed your changes press the **<OK>** button to return to the chart.

To return to the spreadsheet press the right mouse button and select Show|Spreadsheet.



## Spreadsheet Editing

You may wish to enter formula in cells to help calculate table entries. When entering formula you must prefix the formula with either +, - or = to signify the start of the formula.

The following functions are supported:

@Sin(value/formula)	sine of the angle in radians;
@Cos(value/formula)	cosine of the angle in radians;
@Tan(value/formula)	tan of the angle in radians;
@Ln(value/formula)	natural logarithm ;
@Log(value/formula)	logarithm to the base 10;
@Exp(value/formula)	natural exponent;
@Exp10(value/formula)	exponent to the base 10;
@Mod(value/formula)	the remainder of a real value (e.g. 1.234 becomes 234);

The value can be in the form of a formula, cell reference or number.

Additional range functions are supported:

@Sum(range)	the sum of the range e.g. @sum(a1..a4);
@Avg(range)	the average of the range;
@Low(range)	the lowest value in the range;
@High(range)	the highest value in the range;

Ranges must always be in the form - StartCell..EndCell e.g. B1..G8 - column2,row1 to column 7,row 8.

The following arithmetic symbols are supported:

- Addition
- Subtraction
- Multiplication
- / Division
- ! Factorial e.g. 4! = 4\*3\*2\*1
- ^ Power of e.g. 4^2=4\*4

When carrying out arithmetic using functions and symbols it is good practice to include brackets to ensure calculations are carried out correctly e.g.

10!\*(2^3) means 2 to the power of 3 multiplied by the factorial of 10.

Cell references are the same as in most spreadsheets - by column and row e.g. A1 - column 1 row 1.

You can cut, copy and paste cells by using the right mouse button to activate the pop up menu and then select the action you desire from the **Spreadsheet** menu item.

To select all cells with data use the **Spreadsheet|Select All** menu item.

## **Printing Spreadsheet/Chart**

To print the spreadsheet or chart outside of the document press the right mouse button for the pop up menu then select Print|Spreadsheet or Print|Chart dependent on whether the spreadsheet or chart is currently showing. You may wish to do this in order to preview the chart prior to document print.

## Merge Report Records

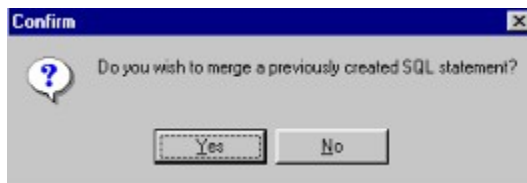


To merge the master document you have created on the screen select **Records|Report Merge| Merge Records** from the main menu.



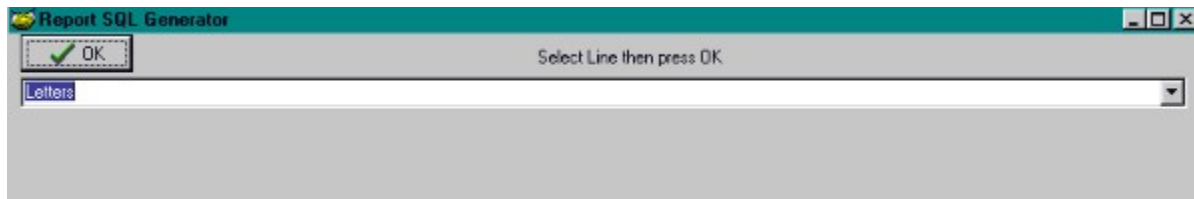
### *Previously merged document*

If you have previously created a merged document then you will get a request to ask whether you want to use a previous merge sequence.



if you select **No** then you will go straight to New Merged Document.

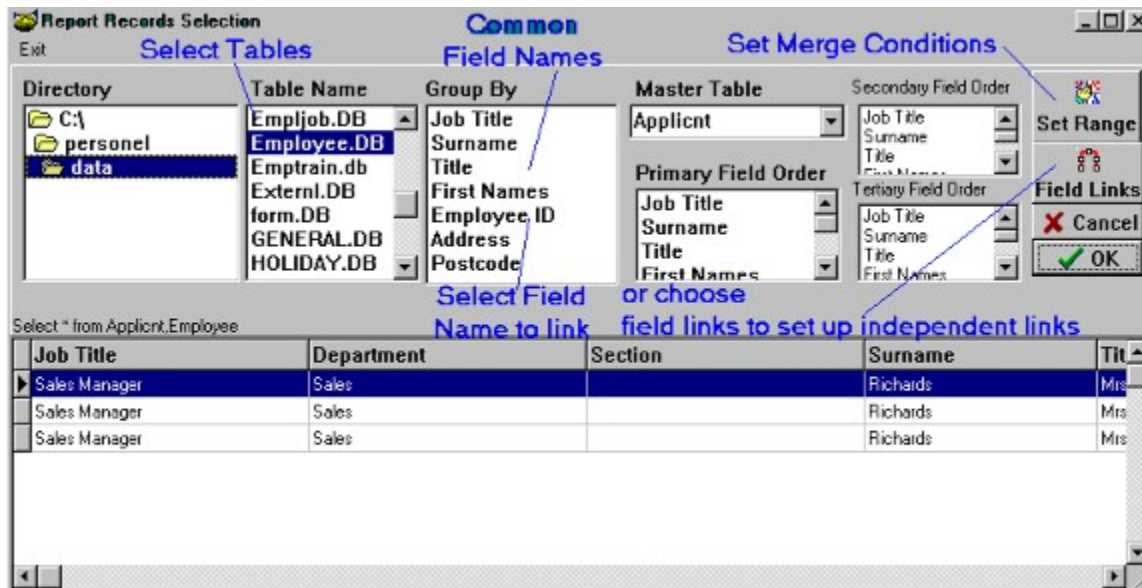
You can now choose the sql sequence you used to generate the merged document by selecting it from the drop down list.



### *New merged document*

The dialogue below appears.





You will need to follow all steps below to successfully merge the document.

- 1 Select Directory in the **Directory** box if the table does not exist in the current directory.
- 2 Select the tables in the **Table Name** box. Multiple tables are selected by pressing the left mouse button and **<Ctrl>** key together over each selection. Try to ensure that all table names that have a field entry on the document are included (you can check by looking at the statement *from* clauses in the SQL Field Entries - e.g. table Employee is shown as *from Employee* in the SQL statement).

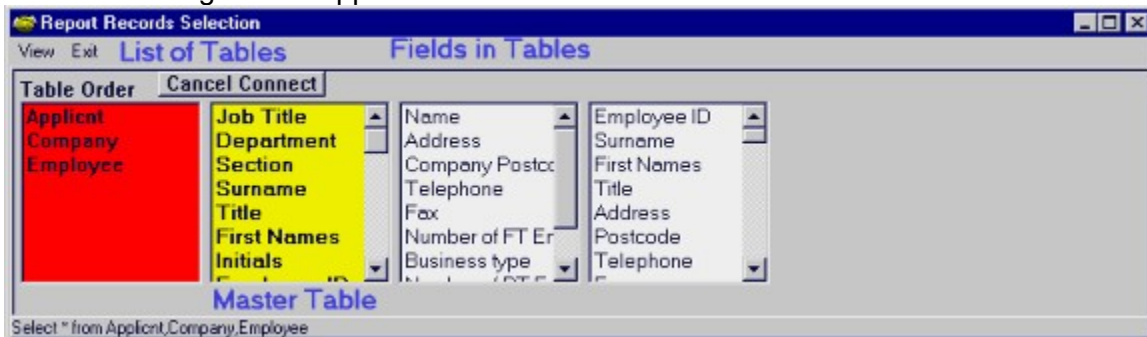
Common fields for more than one table will appear in the **Group By** Box and the **Primary**, **Secondary** and **Tertiary Field Order** boxes. The **Master Table** drop down list selects the first table in the selected file list.



- 1 Set the **Master Table** from the drop down list if you would like another of your selected tables as the table other tables primarily refer to.
- 2 Set the Primary, Secondary and/or tertiary fields for sorting data e.g. Primary = Surname, Secondary = First Names, Tertiary = Postcode would sort the records in the master table by surname, first names and postcode. *You DO NOT need to set any of these fields.*
- 3 Select the records you wish to merge by using the left mouse button and **<Ctrl>** key to select each record.

There are 2 other operations which you may find useful when connecting tables and selecting a range of records:

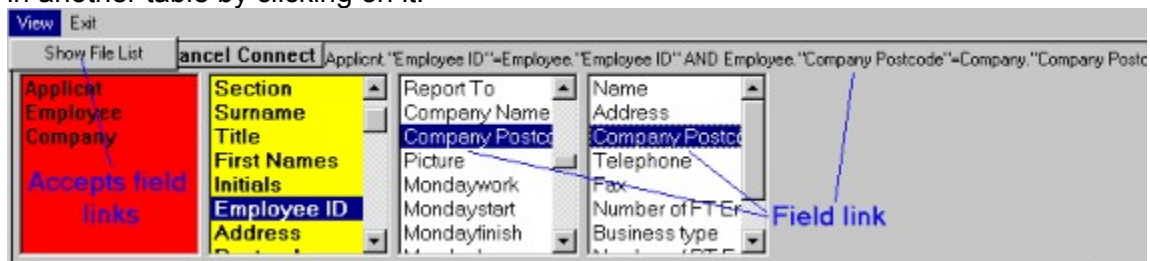
- Connecting tables** without a common field or field that is related between tables. Press the **<Field Links>** button or select **View>Show Field List** from the menu. The following screen appears.



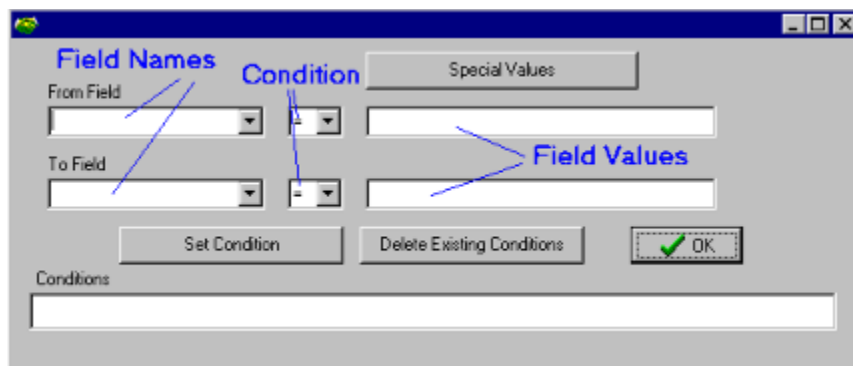
You can re-order the tables so that links between fields are more clearly defined by simply moving the table in the left box to the desired location.



You select a field in one table by clicking the field in the table. You then select the linking field in another table by clicking on it.

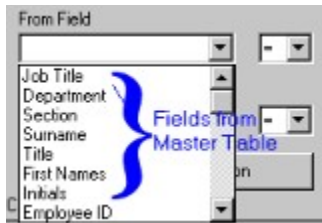


- Isolating a **range of values**. Press the **<Set Range>** button. This will only work if you have set a link between the tables.



The form represents a way to set field entries to specific values. All field entries are drawn from the master table.

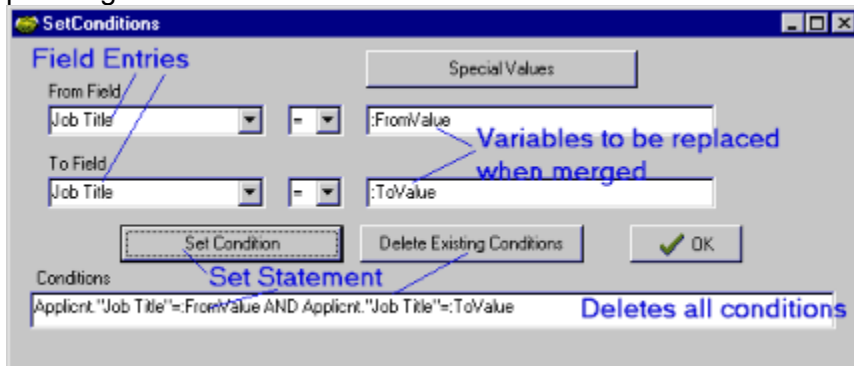
You select a field entry from the list.



You can enter a value for the field or place a special variable which is replaced when the merge takes place e.g. field values for a specific record.



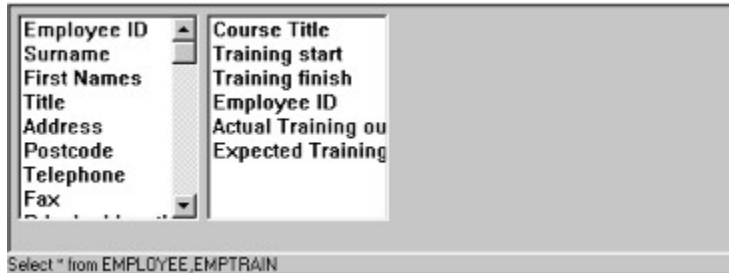
When you are happy with the from field and/or to field conditions you can enter them by pressing the Set Condition button.



When you have completed the conditions you press the <OK> button.

## Connecting Tables

The screen below appears after pressing the **<Field Links>** button or selecting the **View|Show Field List** from the menu.



Link fields by pressing the left mouse button on the field in one table and then press the mouse button on the *same name* field in another table.

To use this effectively a field must be selected in each table otherwise tables will not be linked.

To return to the main field entry select **View|Show File List** from the menu.

You must ensure you select individual records from the resultant table for them to be merged.

## Isolating a range of records

You can select a range of values from the master table using the dialogue below.

Select \* from EMPLOYEE.EMPTRAIN Where EMPTRAIN."Employee ID">EMPLOYEE."Employee ID" Order By EMPLOYEE."Employee ID"

Employee ID	Surname	First Names	Title	Address	Postcode	Telephone	F.▲
1	Richards	Neal	Mr	(Memo)			
3	Herbert	Linda	Mrs	(Memo)			

The field name can be selected from the drop down list and the operator and value for the field in the adjacent fields. You should end up with something like the illustration below after you press the **<Set Condition>** button.

The screenshot shows a dialog box titled "SetConditions". It has three main input areas: "From Field" with a dropdown menu showing "Surname", "Operator" with a dropdown menu showing a list of operators (=", ">", "<", ">=", "<="), and "Value" with an empty text box. Below these are three buttons: "Set Condition", "Delete Existing Conditions", and "OK". At the bottom, there is a "Conditions" label followed by an empty list box.

What this states is to select the records whose surname field has an initial letter greater than 'J' and an initial letter less than 'L'. If you are not happy with the selection then delete it before enter a new condition using the **<Delete Existing Condition>** button.

When you are happy with the results press the **<OK>** button.

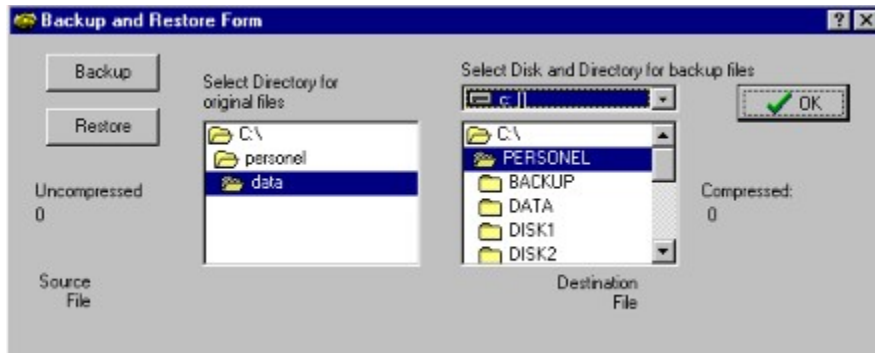
## Printing Report



To print the report ensure that your cursor is in the required report i.e. the master document or merged document. Select **File|Print** from the main menu.



## Backing Up Your Records



To back up files do the following:

1. If you are backing up to floppy disk ensure you have formatted disks available. Put the first disk in the floppy disk drive.
2. Ensure that the source directory for the files is correctly set (normally the Data directory of the Personnel System Directory).
  1. Select where you want the files to be sent to.
  2. Select <Backup> to start the backup procedure.
  3. Make sure you label and date each of the floppy disks that you use for backup.

To restore the files from disk do the following:

1. If you are restoring from floppy disk insert the first disk in the drive.
  1. Ensure that the destination directory is set to the floppy disk drive or location of the backup files.
  2. Ensure the source directory points to the place you presently keep your data records.
    1. Select <Restore> to start the restore operation.

## Employee Work Details - Page 2



Page 2 of the employee details is shown below.

Surname	First Names	Title	Job Title
Beltrun	Gordon	Mr	Chief Accountant

Title Mr First Names Gordon Surname Beltrun

Job Chief Accountant

Company Risk Management Software Ltd

Department Chief Accountant

Section

Telephone

National Insurance YY234567

Tax Code

Current Salary

Grade 3

Status Point on Grade

Manager Taylor

Richard Taylor  
Managing Director

Home / Work 1 / Work 2 / Personal / Financial / Benefits

You can select Job, Manager and Company by pressing the mouse in the relevant entry. The job, manager and company must already have been set up using [Job Description/Person Specification](#) , [Add New Staff Member](#) and [Company Set Up](#) menu Options.

If the manager entry is blank you must select a record in this entry if the employee has a supervisor. Otherwise an organisation chart cannot be drawn.

Version 1 has a different layout allowing you to enter job title, department and section and allocate pay grade and status.



## Employee Work Details - Page 3



Page 3 of the employee details is shown below.

The screenshot shows a software window titled "Employee Details". At the top, there are buttons for "OK", "Cancel", and "Help". Below these is a section "Choose existing employee:" with navigation arrows and a search icon. A table below this section contains the following data:

Surname	First Names	Title	Job Title
Beltrum	Gordon	Mr	Chief Accountant

Below the table is a section titled "Standard contract work schedule." with the following fields: Title: Mr, First Names: Gordon, Surname: Beltrum.

Work this day		Start Time	Finish Time	Hours Worked	
Monday	<input checked="" type="checkbox"/>	09:00:00	17:00:00	8	Total number of hours per week <input type="text" value="40"/>
Tuesday	<input checked="" type="checkbox"/>	09:00:00	17:00:00	8	
Wednesday	<input checked="" type="checkbox"/>	09:00:00	17:00:00	8	
Thursday	<input checked="" type="checkbox"/>	09:00:00	17:00:00	8	
Friday	<input checked="" type="checkbox"/>	09:00:00	17:00:00	8	
Saturday	<input type="checkbox"/>				Start date current job <input type="text"/>
Sunday	<input type="checkbox"/>				End date current job <input type="text"/>

At the bottom of the window, there is a breadcrumb trail: Home / Work 1 / Work 2 / Personal / Financial / Benefits /

This allows you to state what the normal hours of work are for the employee. If there are no normal hours you still need to complete the total number of hours per week box for contractual reasons.

You can state when the employee started work in this job and if the job is for a fixed term when the job ends.

## Employee Personal Details



Page 4 of the employee details is shown below.

The screenshot shows a software window titled "Employee Details". At the top, there are "OK" and "Cancel" buttons, and a "Choose existing employee" section with navigation arrows and a "Help" button. Below this is a table with columns "Surname", "First Names", "Title", and "Job Title". The first row contains "Beltrum", "Gordon", "Mr", and "Chief Accountant".

The main form area contains the following fields:

- Title: Mr, First Names: Gordon, Surname: Beltrum
- Next of Kin: [Text Field]
- Contact Tel.: [Text Field] (Emergency)
- Next of Kin Address: [Text Area]
- Doctor: [Text Field]
- Telephone: [Text Field]
- Doctor's address: [Text Area]

On the right side, there is an "Equal Opportunities Monitoring" section with the following options:

- Sex: M (dropdown)
- Disabled:
- Married:
- Children (0..99): [Text Field]
- Racial Type: White Skinned Europe (dropdown)
- Edit Race Types (button)

At the bottom, there is a breadcrumb trail: Home / Work 1 / Work 2 / Personal / Financial / Benefits

Allows the entry of next of kin and doctor.

The equal opportunities monitoring box is used for monitoring process and reports are produced to show the breakdown for equal opportunities.

## Word Processor - Conditions



The main word processor for setting company wide policy, procedure and documentation can be set up here together with the possibility of copying these statements over to specific job terms and conditions of contract. The Staff Handbook Job is a specially created job to allow the set up of a staff handbook of standard terms and conditions.

The screenshot displays the 'Company Policy' software interface. The window title is 'Company Policy'. The menu bar includes 'File', 'Edit', 'Contract Conditions', 'Job Contract', 'Format', 'View', 'Window', and 'Help'. The 'Contract Conditions' menu is open, showing 'Statement Conditions Navigation buttons' and 'Standard statements classification'. The 'Choose Category' dropdown is set to 'Contract of Employment', 'Sub-Sub Category' is empty, 'Sub Category' is 'Master', and 'Item Number' is '1'. There are checkboxes for 'Required' and 'All Employee Contracts'. Below the menu is a toolbar with 'Copy Condition' and 'Paste Condition' buttons. The main area is split into two panes: 'Master Contract' and 'Job Contract'. The 'Master Contract' pane shows 'General clauses.', 'Pay scales', and 'Pensions' on the left, and 'Company cars' on the right, with 'Master Statement' in the center. The 'Job Contract' pane shows 'General clauses.' and 'Pay scales' on the left, and 'Job Contract' in the center. The status bar at the bottom shows 'stLine', 'Job DocumentSales Manager', 'Sales', and 'Sales'.

The menu offers the following options to view details click on the Menu option shown.

1. File.
2. Edit.
1. Contract Conditions .
2. Job Contract .
1. Format.
2. Window.

Statement conditions are to be found in the master contract document on screen and can be

saved and created using either the contract menu options as well or the navigator buttons or the drop down list of category, sub-category and sub-sub-category headings.

The word processor icons are standard.

**Legal - Terms and  
Conditions of Contract**



Click on menu for more information.



Click on menu for more information.



Click on menu for more information.



Click on menu for more information.





Click on menu for more information.



Click on menu for more information.

## Record Handling

<b><u>Menu Option</u></b>	<b><u>Action</u></b>
<b>New</b>	Creates either a new job contract or new statement.
<b>Open</b>	Moves to a selected record.
<b>Save</b>	Saves the job contract or statement record.
<b>Import RTF</b>	Loads RTF text from a file created in another word processor.
<b>Delete</b>	Deletes the current statement record.

## **Edit Text**

This allows you to carry out the normal cut, copy and paste facilities in the document your cursor is currently in. As an alternative you can use the icons on the wordprocessor toolbar.

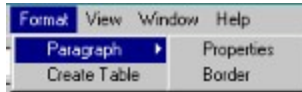
## Statement Updates

You can move between records and save or delete statement records by using these menu options or using the navigator buttons. *Be careful when deleting records as they cannot be retrieved later.*

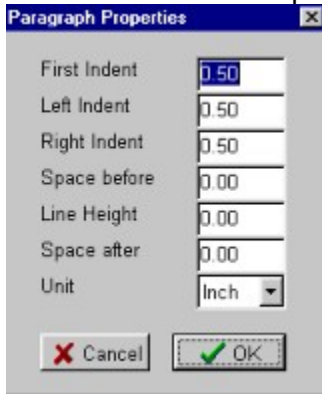
## Format

This allows you to change the paragraph margins, lines around and whether you want to insert a table.

To change the characteristics of a specific paragraph choose Format|Paragraph from the main WP menu.



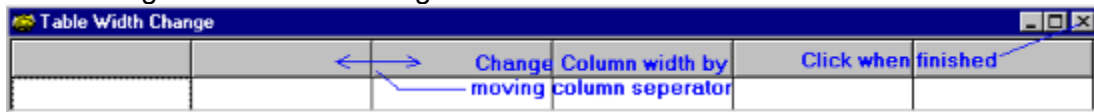
To change the paragraph margins/indents select either Format|Paragraph|Properties from the main menu which will present the following dialogue



or move the ruler left, first and right indent markers.

To change the paragraph borders (lines around) select the Format|Paragraph|Borders from the main menu.

To create a table select Format|Table|Create from the main menu and enter the number of columns and rows. To change the width of each of the columns select Format|Table|Modify from the main menu and change the relative column widths by keeping the mouse left button down and moving the column left or right.



## Job Contract Movement

You can move between records and save or delete job contract records by using these menu options or using the navigator buttons for job contract. *Be careful when deleting records as they cannot be retrieved later.*

## **Zooming in and Out**

The view of the documents are shown as normal layout. If you want to see what they look like on the page as a whole you can select Full Page.



## Changing Screen Layout

You can decide whether you want the word processor toolbar, statement titles and bottom of the screen status bar showing by ticking the appropriate option.

## **Window View**

You can decide whether you want your two viewed documents side by side vertically or horizontally. If you only require to edit statement conditions you need select contract only.

## Managing Tables

If you find your database files and/or records have become corrupted you may want to delete corrupted records. If you decide that the whole table is corrupted it is worthwhile bringing in your most recent [backup](#) of data.

Before deleting records be careful to ensure that tables do not have important links. Be particularly careful when deleting records from the following files:

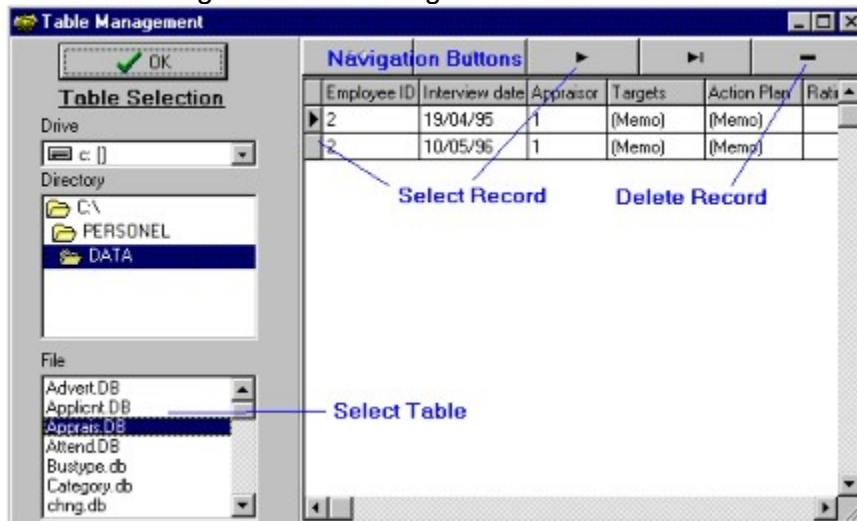
- Job.DB. Links to empljob.DB and employee.DB tables and will cause problems once the link is established between an employee name and the job the employee works on.
- Company.DB. Do not delete the company record as this will cause problems when other tables attempt to access the specific record.

View [database structures](#) to get more information.

To delete specific records select Management from the Database menu or <Database Management> button.



You should get to the following screen



1? Select the directory and file you want to look at.

1? Select the record you want to delete.

1? Press the <-> button from the Navigation buttons.

## Database Structures

To understand the tables used it is worth looking at the table below which gives an idea of the related fields in the various tables.

Table	Field	Related Table	Related Field
Advert.DB	Job Title Department Section	Job.DB	Job Title Department Section
Apprais.DB	Employee ID Appraiser	Employee.DB	Employee ID
Attend.DB	Employee ID	Employee.DB	Employee ID
Compcont.DB	Job Title Department Section	Job.DB	Job Title Department Section
Empljob.DB	Employee ID Boss ID	Employee.DB	Employee ID
Emptrain.db	Employee ID Course Title Training start Training finish	Employee.DB Train.DB	Employee ID Course Title Training start Training finish
HOLIDAY.DB	Employee ID	Employee.DB	Employee ID
INTRVIEW.DB	Employee ID Interviewer1 Interviewer2	Employee.DB	Employee ID
Jobdesc.DB	Job Title Department Section	Job.DB	Job Title Department Section
Jobelem.DB	Section Sub Section Number	Jobdesc.DB	Section Sub Section Number
racetype.DB	Ref no	Employee.DB	Race
Sick.DB	Employee ID	Employee.DB	Employee ID

**All other tables are used internally by the program.**

You can view a full [list of fields](#) .

## Full List of Fields

### Advertisement records for specific jobs

#### Advert.DB

FieldName	FieldSize	FieldType
Job Title	30	character or string
Department	30	character or string
Section	30	character or string
Date created	0	Date
Advert Details	1	Binary Large Object

### Applicant records

FieldName	FieldSize	FieldType
Job Title	30	character or string
Department	30	character or string
Section	30	character or string
Surname	25	character or string
Title	4	character or string
First Names	35	character or string
Initials	5	character or string
Employee ID	9	character or string
Address	10	Text memo
Postcode	10	character or string
Telephone (Home)	17	character or string
Telephone (Work)	17	character or string
Interview date	0	Date
Interview time	0	Time
1st letter sent	0	Date
Send1	0	Boolean
Accept1	0	Boolean
2nd letter sent	0	Date
Send2	0	Boolean
Accept2	0	Boolean
3rd letter sent	0	Date
Send3	0	Boolean
Accept3	0	Boolean
4th letter sent	0	Date
Send4	0	Boolean
Accept4	0	Boolean
Interviewer 1	9	character or string
Interviewer 2	9	character or string
Interviewer 3	9	character or string
Interviewer 4	9	character or string
Interviewer 5	9	character or string
Interviewer 6	9	character or string
Interviewer 7	9	character or string
Interviewer 8	9	character or string
Interviewer 9	9	character or string

Interviewer 10	9	character or string
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### Employee Appraisal Interview Records

#### Apprais.DB

FieldName	FieldSize	FieldType
Employee ID	9	character or string
Interview date	0	Date
Appraiser	9	character or string
Targets	8	Text memo
Action Plan	8	Text memo
Rating	0	16-bit integer
Status change	0	16-bit integer

### Employee Absence Records

#### Attend.DB

FieldName	FieldSize	FieldType
Employee ID	9	character or string
Day attendance	0	Date
Attendance Mode	1	character or string
Attend Description	12	Text memo
UnAuthorised	0	Boolean

### Business Types

#### Bustype.db

FieldName	FieldSize	FieldType
Business type	20	character or string

### Internal Use

#### Category.db

FieldName	FieldSize	FieldType
Category	25	character or string

### Backup of terminated employee records

#### Chng.DB

FieldName	FieldSize	FieldType
Employee ID	9	character or string
Surname	25	character or string
First Names	35	character or string
Title	4	character or string
Address	12	Text memo
Postcode	10	character or string
Telephone	15	character or string
Fax	15	character or string
Principal location	12	Text memo
Sex	1	character or string
Tax code	6	character or string
NI code	13	character or string
Married	0	Boolean

Children	0	Floating-point numeric
Contract	20	Binary Large Object
Header	10	Binary Large Object
Footer	10	Binary Large Object
Race	0	16-bit integer
Registered Disabled	0	Boolean
Next of kin	45	character or string
Next of kin address	12	Text memo
Doctor	35	character or string
Doctor Address	12	Text memo
Revision Date	0	Date
Date of Birth	0	Date
Job Title	30	character or string
Report To	9	character or string
Company Name	40	character or string
Company Postcode	12	character or string
Pension Details	8	Text memo
Pension Join	0	Date
Pension Eligible	0	Date
PHI Details	8	Text memo
PHI Join	0	Date
PHI Eligible	0	Date
Picture	1	Bitmap
Mondaywork	0	Boolean
Mondaystart	0	Time
Mondayfinish	0	Time
Mondayhours	0	Floating-point numeric
Tuesdaywork	0	Boolean
Tuesdaystart	0	Time
Tuesdayfinish	0	Time
Tuesdayhours	0	Floating-point numeric
Wednesdaywork	0	Boolean
Wednesdaystart	0	Time
Wednesdayfinish	0	Time
Wednesdayhours	0	Floating-point numeric
Thursdaywork	0	Boolean
Thursdaystart	0	Time
Thursdayfinish	0	Time
Thursdayhours	0	Floating-point numeric
Fridaywork	0	Boolean
Fridaystart	0	Time
Fridayfinish	0	Time
Fridayhours	0	Floating-point numeric
Saturdaywork	0	Boolean
Saturdaystart	0	Time
Saturdayfinish	0	Time
Saturdayhours	0	Floating-point numeric
Sundaywork	0	Boolean
Sundaystart	0	Time
Sundayfinish	0	Time
Sundayhours	0	Floating-point numeric

Totalhoursperweek	0	Floating-point numeric
Check	0	Boolean
Bank Name	35	character or string
Bank Address	6	Text memo
Bank Telephone	15	character or string
Bank Sort Code	8	character or string
Bank Account No	12	character or string
Payment Period	1	character or string

#### chnngApprais.DB

FieldName	FieldSize	FieldType
Employee ID	9	character or string
Interview date	0	Date
Appraisor	9	character or string
Targets	8	Text memo
Action Plan	8	Text memo
Rating	0	16-bit integer
Status change	0	16-bit integer

#### chnngAttend.DB

FieldName	FieldSize	FieldType
Employee ID	9	character or string
Day attendance	0	Date
Attendance Mode	1	character or string
Attend Description	12	Text memo
UnAuthorised	0	Boolean

#### chnngCar Use.DB

FieldName	FieldSize	FieldType
Identifier	0	32-bit integer
Employee ID	9	character or string
Start Date	0	Date
Return Date	0	Date
Problems	6	Text memo
Mileage	0	32-bit integer

#### chnngEmptrain.db

FieldName	FieldSize	FieldType
Course Title	35	character or string
Training start	0	Date
Training finish	0	Date
Employee ID	9	character or string
Actual Training outcome	15	character or string
Expected Training outcome	15	character or string

#### chnngIntrview.db

FieldName	FieldSize	FieldType
Employee ID	9	character or string



Code	2	character or string
Interview date	0	Date
Outcome code	2	character or string
Interviewer1	9	character or string
Interviewer2	9	character or string
Outcome	8	Text memo
Action	8	Text memo
Detail	8	Text memo

### Chngjob.DB

FieldName	FieldSize	FieldType
Employee ID	9	character or string
Job Title	30	character or string
Department	30	character or string
Section	30	character or string
Boss Surname	25	character or string
Boss First Names	35	character or string
Boss ID	9	character or string
Work Phone number	15	character or string
Status point in grade	0	16-bit integer
Current Salary	0	Money
Job start date	0	Date
Job end date	0	Date
Change reason	8	Text memo
Code	2	character or string
Level	0	32-bit integer

### Internal Use

#### Codedesc.DB

FieldName	FieldSize	FieldType
Code	2	character or string
Description	12	Text memo

### Employee Vehicle Use Records

#### Car Use.DB

FieldName	FieldSize	FieldType
Identifier	0	32-bit integer
Employee ID	9	character or string
Start Date	0	Date
Return Date	0	Date
Problems	6	Text memo
Mileage	0	32-bit integer

### Vehicle Register

#### Company Car.DB

FieldName	FieldSize	FieldType
Identifier	0	32-bit integer
Type	25	character or string
Model	25	character or string

Registration		10		character or string
Price	0		Money	
Ownership		8		character or string

## Company Record

### Company.DB

FieldName	FieldSize	FieldType
Name	40	character or string
Address	12	Text memo
Company Postcode	12	character or string
Telephone	15	character or string
Fax	15	character or string
Number of FT Employees	0	16-bit integer
Business type	20	character or string
Number of PT Employees	0	16-bit integer
Number of Contract Empl.	0	16-bit integer

## Job Contract Conditions

### Compcont.DB

FieldName	FieldSize	FieldType
Job Title	30	character or string
Department	30	character or string
Section	30	character or string
Grade	4	character or string
Header	8	Text memo
Footer	8	Text memo
Description	12	Text memo
Necessity	0	Boolean
Require	0	Boolean
CompanyPostcode	12	character or string

## General Contract Conditions

### CONTRACT.DB

FieldName	FieldSize	FieldType
Category	25	character or string
Sub-category	35	character or string
Sub-sub-category	35	character or string
Item number	0	Floating-point numeric
Description	8	Text memo
Necessity	0	Boolean
Require	0	Boolean

### DATAFLDS.DB

FieldName	FieldSize	FieldType
Database	8	character or string
Field	25	character or string
Field Description	40	character or string
DataType	20	character or string
Size	0	16-bit integer

### Effect.DB

FieldName	FieldSize	FieldType
Effect	2	character or string
Description	12	Text memo

### Emplcont.DB

FieldName	FieldSize	FieldType
Employee ID	9	character or string
Condition Record	0	16-bit integer
Description	8	Text memo

### Job for specific employee

#### Empljob.DB

FieldName	FieldSize	FieldType
Employee ID	9	character or string
Job Title	30	character or string
Department	30	character or string
Section	30	character or string
Boss Surname		25 character or string
Boss First Names	35	character or string
Boss ID	9	character or string
Work Phone number	15	character or string
Status point in grade	0	16-bit integer
Current Salary	0	Money
Job start date	0	Date
Job end date	0	Date
Change reason		8 Text memo
Code	2	character or string
Level	0	32-bit integer

### Main Employee record

#### Employee.DB

FieldName	FieldSize	FieldType
Employee ID	9	character or string
Surname	25	character or string
First Names	35	character or string
Title	4	character or string
Address	12	Text memo
Postcode	10	character or string
Telephone	15	character or string
Fax	15	character or string
Principal location	12	Text memo
Sex	1	character or string
Tax code	6	character or string
NI code	13	character or string
Married	0	Boolean
Children	0	Floating-point numeric
Contract	20	Binary Large Object
Header	10	Binary Large Object

Footer	10		Binary Large Object
Race	0		16-bit integer
Registered Disabled		0	Boolean
Next of kin		45	character or string
Next of kin address		12	Text memo
Doctor	35		character or string
Doctor Address		12	Text memo
Revision Date		0	Date
Date of Birth		0	Date
Job Title		30	character or string
Report To		9	character or string
Company Name			40 character or string
Company Postcode		12	character or string
Pension Details		8	Text memo
Pension Join		0	Date
Pension Eligible		0	Date
PHI Details		8	Text memo
PHI Join		0	Date
PHI Eligible		0	Date
Picture	1		Bitmap
Mondaywork		0	Boolean
Mondaystart		0	Time
Mondayfinish		0	Time
Mondayhours		0	Floating-point numeric
Tuesdaywork		0	Boolean
Tuesdaystart		0	Time
Tuesdayfinish		0	Time
Tuesdayhours		0	Floating-point numeric
Wednesdaywork		0	Boolean
Wednesdaystart		0	Time
Wednesdayfinish		0	Time
Wednesdayhours		0	Floating-point numeric
Thursdaywork		0	Boolean
Thursdaystart		0	Time
Thursdayfinish		0	Time
Thursdayhours		0	Floating-point numeric
Fridaywork		0	Boolean
Fridaystart		0	Time
Fridayfinish		0	Time
Fridayhours		0	Floating-point numeric
Saturdaywork		0	Boolean
Saturdaystart		0	Time
Saturdayfinish		0	Time
Saturdayhours		0	Floating-point numeric
Sundaywork		0	Boolean
Sundaystart		0	Time
Sundayfinish		0	Time
Sundayhours		0	Floating-point numeric
Totalhoursperweek		0	Floating-point numeric
Check	0		Boolean
Bank Name		35	character or string

Bank Address	6	Text memo
Bank Telephone	15	character or string
Bank Sort Code	8	character or string
Bank Account No	12	character or string
Payment Period	1	character or string

### Training records for each employee

#### Emptrain.db

FieldName	FieldSize	FieldType
Course Title	35	character or string
Training start	0	Date
Training finish	0	Date
Employee ID	9	character or string
Actual Training outcome	15	character or string
Expected Training outcome	15	character or string

### External complaint records

#### External.DB

FieldName	FieldSize	FieldType
Employee ID	9	character or string
Surname	25	character or string
First Names	35	character or string
Title	4	character or string
Address	12	Text memo
Postcode	10	character or string
Telephone	15	character or string
Sex	1	character or string

#### Externl.DB

FieldName	FieldSize	FieldType
Employee ID	9	character or string
Surname	25	character or string
First Names	35	character or string
Title	4	character or string
Address	12	Text memo
Postcode	10	character or string
Telephone	15	character or string
Sex	1	character or string

### Report Generator produced Reports

#### form.DB

FieldName	FieldSize	FieldType
Form Type	20	character or string
Name	20	character or string
Number	0	Floating-point numeric
Report	12	Binary Large Object
SQL	12	Text memo
DatabaseNames	12	Text memo
ReportSQL	12	Text memo

ReportDBName	12	Text memo
Header	12	Text memo
Footer	12	Text memo

#### GENERAL.DB

FieldName	FieldSize	FieldType
Access Code	3	character or string
Description	12	Formatted text memo

### Holiday records for each employee

#### HOLIDAY.DB

FieldName	FieldSize	FieldType
Employee ID	9	character or string
Holiday start	0	Date
Holiday finish	0	Date
Holiday period	0	Floating-point numeric

### Discipline and grievance interview records for each employee

#### INTRVIEW.DB

FieldName	FieldSize	FieldType
Employee ID	9	character or string
Code	2	character or string
Interview date	0	Date
Outcome code	2	character or string
Interviewer1	9	character or string
Interviewer2	9	character or string
Outcome	8	Text memo
Action	8	Text memo
Detail	8	Text memo

### Main Job Record

#### Job.DB

FieldName	FieldSize	FieldType
Job Title	30	character or string
Department	30	character or string
Section	30	character or string
Grade	4	character or string
Period of Pay	1	character or string
Weekly Hours	0	Floating-point numeric
Holiday entitlement/year	0	Floating-point numeric
Key Objectives	8	Text memo
Key Responsibilities	8	Text memo
Key Duties	8	Text memo
Physical - M	8	Text memo
Physical - D	8	Text memo
Attainments - M	8	Text memo
Attainments - D	8	Text memo
Intelligence - M	8	Text memo
Intelligence - D	8	Text memo

Special Aptitudes - M	8	Text memo
Special Aptitudes - D	8	Text memo
Interest types - M	8	Text memo
Interest types - D	8	Text memo
Disposition - M	8	Text memo
Disposition - D	8	Text memo
Circumstances - M	8	Text memo
Circumstances - D	8	Text memo
Number	0	16-bit integer

### Job Description and Person Specification construction records

#### Jobdesc.DB

FieldName	FieldSize	FieldType
Job Title	30	character or string
Department	30	character or string
Section	30	character or string
Element	35	character or string
Sub Element	25	character or string
Number	0	16-bit integer
Description	12	Text memo
Importance	0	16-bit integer
Company Importance	0	16-bit integer

### Job Description element records for specific job titles.

#### Jobelem.DB

FieldName	FieldSize	FieldType
Section	35	character or string
Sub Section	25	character or string
Number	0	16-bit integer
Description	8	Text memo

#### Outcome.DB

FieldName	FieldSize	FieldType
Outcome code	2	character or string
Outcome description	12	Text memo

### Pay Structure records

#### Pay.db

FieldName	FieldSize	FieldType
Grade	4	character or string
Points on Scale	0	16-bit integer
Bottom Pay	0	Money
Top Pay	0	Money
Overtime Rate/Hour	0	Money

### Racial Types used for employee records

#### racetype.DB

FieldName	FieldSize	FieldType
-----------	-----------	-----------

Racial Type	30	character or string
Ref no	0	Auto-incrementing 32-bit integer counter

### Sick.DB

FieldName	FieldSize	FieldType
Employee ID	9	character or string
Sick description	12	Text memo
Sick start date	0	Date
Sick end date	0	Date
Sick period	0	Floating-point numeric
Certification received	0	Boolean

### table1.db

FieldName	FieldSize	FieldType
Section	35	character or string
Sub Section	25	character or string
Number	0	16-bit integer
Description	8	Text memo

### table2.db

FieldName	FieldSize	FieldType
Job Title	30	character or string
Department	30	character or string
Section	30	character or string
Element	35	character or string
Sub Element	25	character or string
Number	0	16-bit integer
Description	12	Text memo
Importance	0	16-bit integer
Company Importance	0	16-bit integer

## Training Records for each employee

### Train.DB

FieldName	FieldSize	FieldType
Course Title	35	character or string
Training start	0	Date
Training finish	0	Date
Location	8	Text memo
Manager Surname	25	character or string
Manager FirstNames	35	character or string
Manager Title	4	character or string
Contact Number	15	character or string
Training description	12	Text memo
Code	2	character or string
Actual Training Cost	0	Money
Estimated Training Cost	0	Money
Training review rating	0	Floating-point numeric



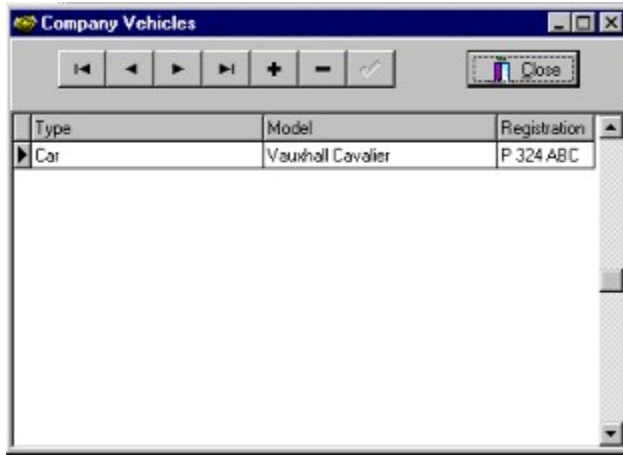


## **Cleaning Up Blank Records**

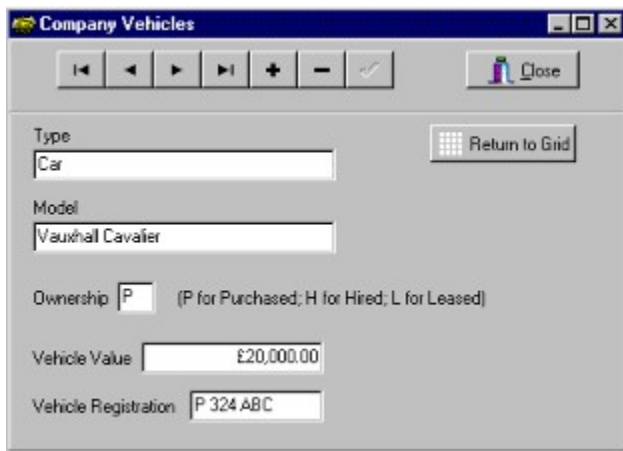
To get rid of any blank records in your tables simply press the <OK> button on this form.

## Vehicle Usage

If you have no vehicles yet entered on to the database you will immediately go into the Company Vehicles form.



This is a grid of all vehicles presently entered on the database. You can add to it by pressing the <+> button or use the <-> button to delete records. When you press the <+> button or select a record you are immediately shown the Vehicle entry screen.



The screenshot shows the "Company Vehicles" window with the vehicle entry form. The form includes fields for Type, Model, Ownership, Vehicle Value, and Vehicle Registration, along with a "Return to Grid" button.

Type: Car  
Model: Vauxhall Cavalier  
Ownership: P (P for Purchased; H for Hired; L for Leased)  
Vehicle Value: £20,000.00  
Vehicle Registration: P 324 ABC

On this you can enter any information for the vehicle.

When you have completed entry of vehicle details then press the <Close> button.

You should now be at the Company Car Allocation form.

Company Car Allocation

Employee  
Beltrum

Mr Gordon Beltrum  
Sales Representative

Vehicle Allocated  
Vauxhall Cavalier

Date From 01/01/1996 Miles Used 250 Car Vauxhall Cavalier  
Date Returned 02/01/1996

Comments on returned car  
Moved to start


On this you get the opportunity of selecting the user and vehicle from drop down lists. Once selected you can enter the dates and mileage used and any comments relating to its use.

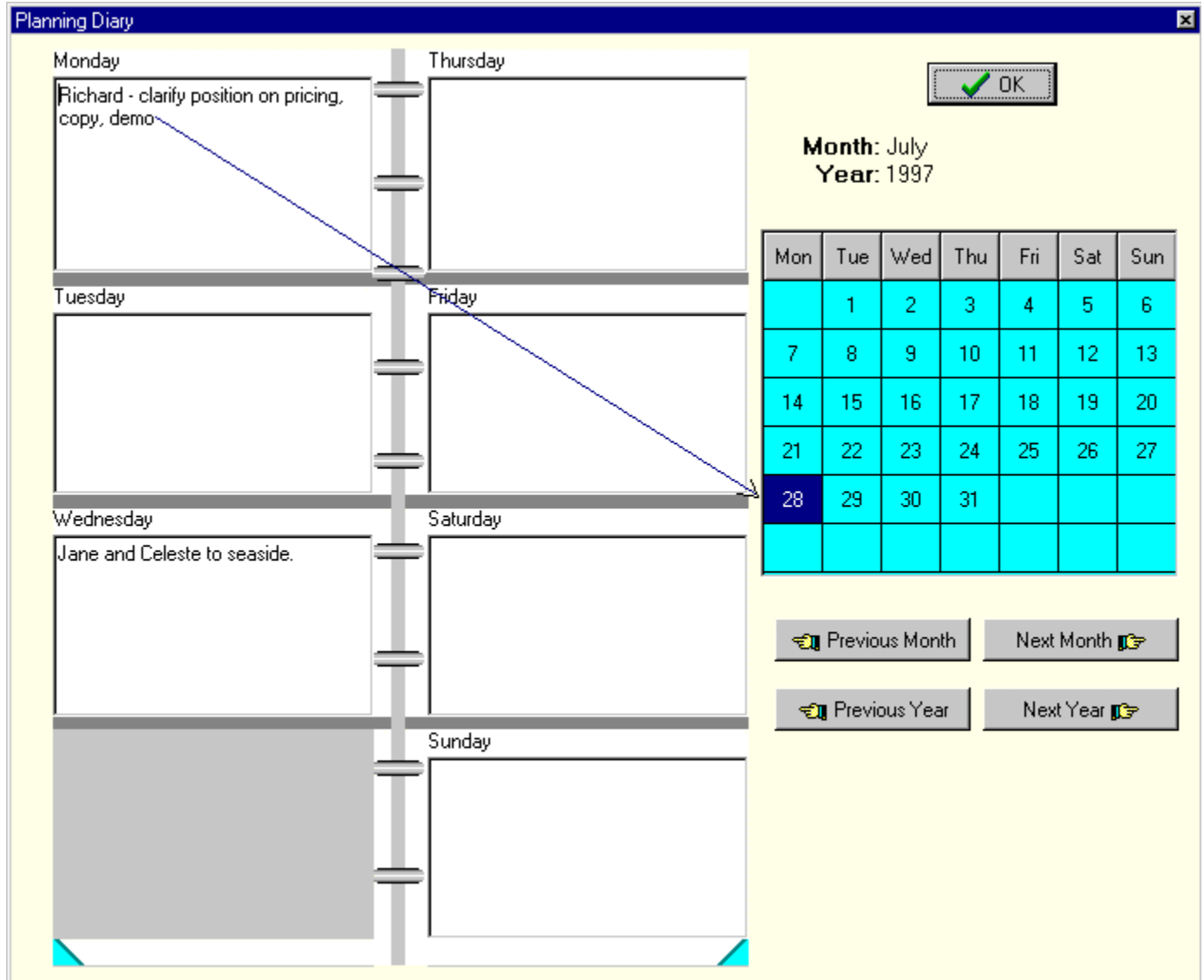
You can return to the vehicle entry form by pressing the <Change Company Cars> button.

If you would like to see a list of usage then press the <History> button.

When you have completed entry you can return to the main screen by clicking <Close>.

## Diary

To view/edit the diary you either access it from the diary button on the main button screen or use the  button when it appears beside a date entry field.



Planning Diary

Monday  
Richard - clarify position on pricing, copy, demo

Tuesday

Wednesday  
Jane and Celeste to seaside.

Thursday

Friday

Saturday

Sunday

Month: July  
Year: 1997

Mon	Tue	Wed	Thu	Fri	Sat	Sun
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Previous Month    Next Month

Previous Year    Next Year

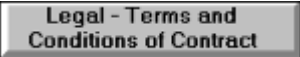
OK

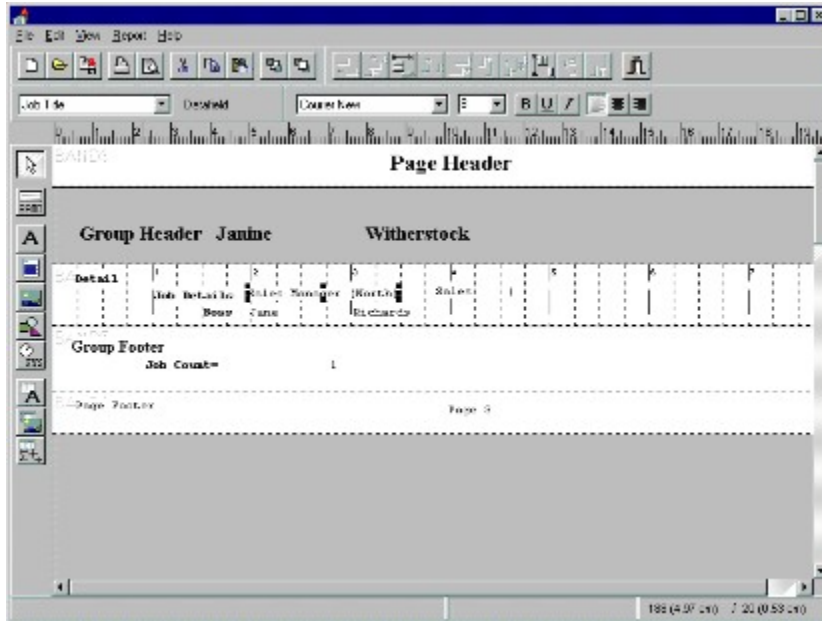
The diary offers you the ability to enter actions for specific dates by pressing the date in the calendar and typing your entry.

It is particularly useful to ensure that your appointments for interviews do not conflict.

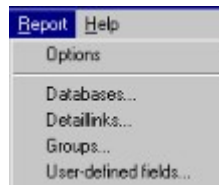
Once completed press the <OK> button to exit.

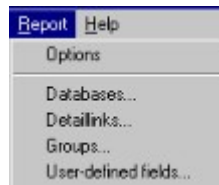
## Custom Reports

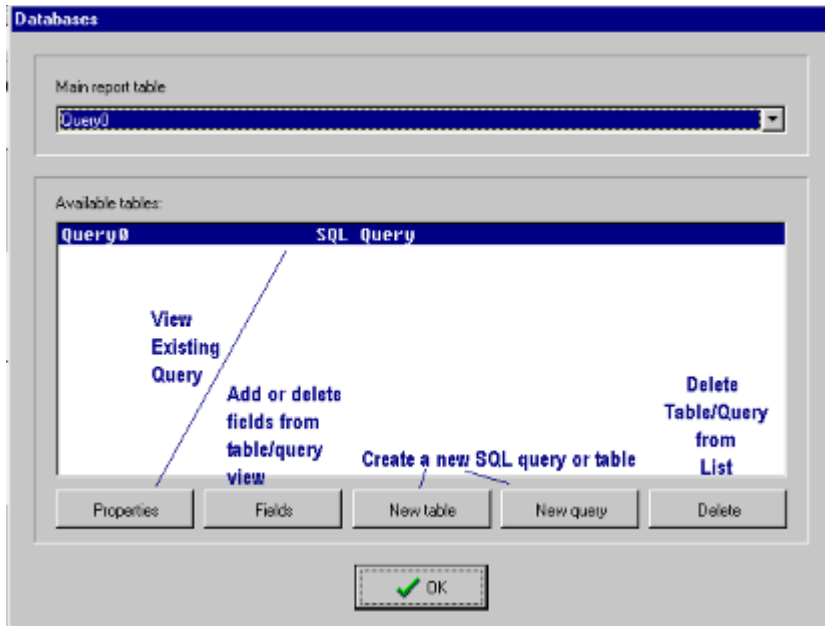
The custom report can be created/edited by pressing the  button on the report list form.



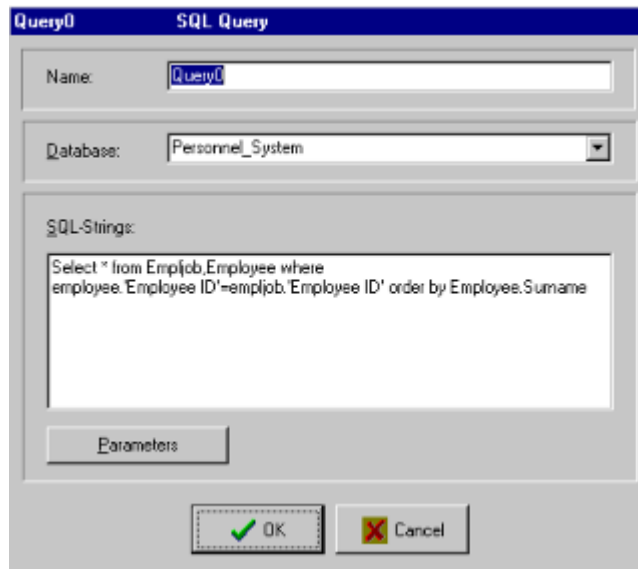
The create a custom report you need to carry out the following steps:




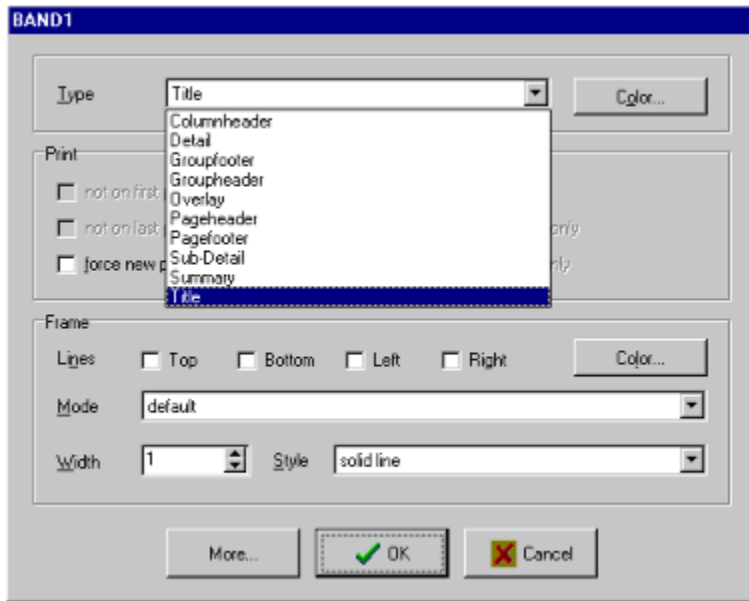
1. Go into the Report menu  and choose option databases if you wish to enter database information on to the report.



1. The screen appears. You will need to create a query or table from which to get the information. Refer to [Field Lists](#) for a full list of tables and their fields. You use a table if all the fields you need are in the table, a query if the fields are spread over a number of tables.

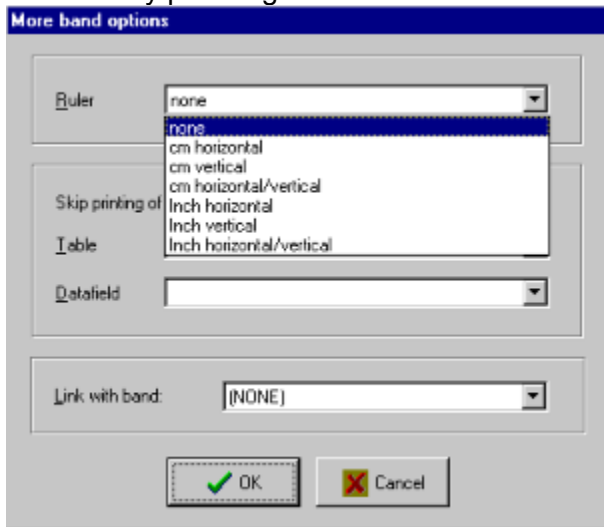


1. Selecting New Query gives you which requires you to use the SQL language to generate the table links.
1. Select a database (the personnel tables are all in Personnel\_System).
  1. Enter your SQL statement. When you press <OK> the statement will be tested and an error message will appear if you have made a mistake.
1. Now you can start entering the information you require on the form. The form is made up of a number of **bands**. Each band represents a mechanism for splitting up the report. Pressing the band button  gives you the following form.



and you can add further details for

the band by pressing the <More> button.



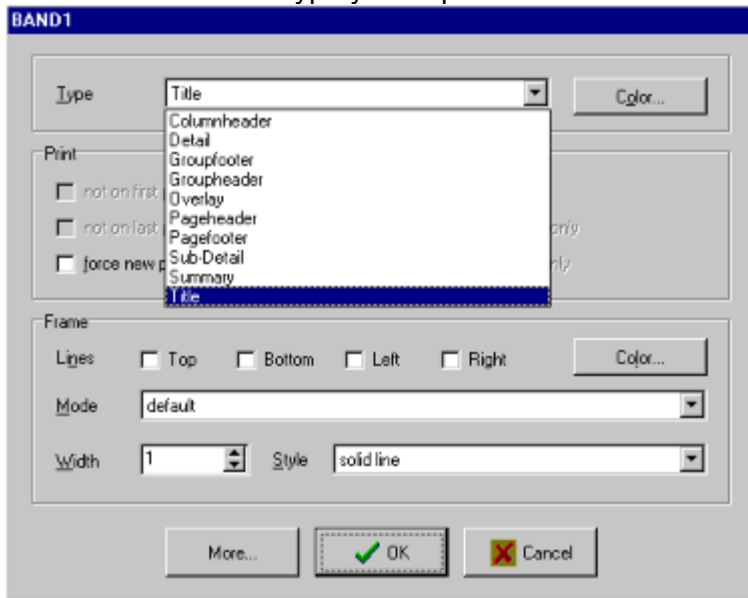
Setting a ruler can be useful to aid layout of the

entries on the page. The band names are:

1. Title This band is printed automatically once at the start of the report.
1. PageHeader Page header bands appear automatically on top of each page. You can have as many Page header bands you want.
1. Detail The Detail band gets printed once for every record in your dataset. If you design a master/detail report using the Detail Link component this band will be the detail band for your master table. You can have as many detail bands you want.
2. SubDetail If you create a master/detail report using the Detail Link component then this band will be the Detail band for your Detail Table(s). You must connect the Detail Group band to the Detail Link component using the Detail Link - Detail Band.
1. PageFooter This band is printed automatically at the bottom of every page.
1. Summary The Summary band is printed automatically on the last page of the report, after all detail bands and group footers.
1. GroupHeader Group Header bands are used as group headers for Group and Detail Link components. They must be connected to such a component to be printed.
1. GroupFooter Group footers are used as footers for Group and Detail Link components.



- They must be connected to such a component to be printed
2. ColumnHeader If you print a multi column report this band will be printed on top of each column.
  1. Overlay If you want some static text or graphic to be printed on every page of your reports then you can use the Overlay band. This band will be printed once on each page and it overlay all other text and graphic printed on the page.
1. Enter bands for each type you require. The screen



comes up and you select the band from the drop down list. To edit a current band type press the right mouse button on the band. You can specify where any lines can appear on the band and whether you want a new page before the band is printed. An example of bands is shown in ExampleReport.

1. Once you have created bands you can enter information on to them. The buttons down the left side offer the following:



1. Offers the ability to put in standard text that will appear in the band at the position you place it.



1. Offers a text box that allows you to enter text that is wrapped inside the box.



1. Offers the ability to import a specific image e.g. a logo.



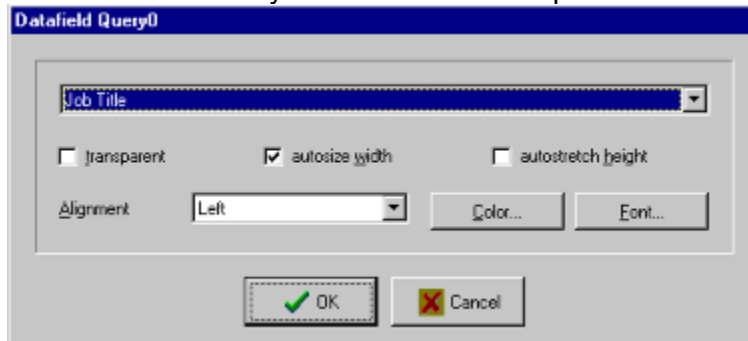
2. Allows you to enter standard shapes and lines.



1. Enters system information such as date, time, page numbers, etc.



1. Automatically enters data from a specific field from the database.



When using a memo field you need to ensure the autosize width is off and autostretch height is on then physically stretch the width of

the memo to the required width.



1. Automatically enters an image taken from the tables e.g. staff picture.



1. Automatically enters a calculation of table values. Used for summary information e.g. count, sum all field entries.

calculated field from Query0

Datafield: Employee ID

Autosize field       transparent

Alignment: Right      Color...      Font...

Operation: Sum

Printmask: Average  
Count  
Maximum  
Minimum  
Sum

Resetband:

OK      Cancel

1. Once you have the entries you can set up relationships between bands by either using:  
1. Group Links. Select Groups from the Report Menu.

Groups

Groups:

Query0: Employee ID (Level 0)

Group Band Edit

Add New Group Band      Delete a Group Band

Properties      Add...      Delete

OK

You can set up a new group relationship between header and footer bands by pressing the <ADD> button.

The image shows a 'Group' dialog box with the following settings:

- Table: Query0
- Datafield: Employee ID
- Headerband: BAND2
- Footerband: BAND5
- Level: 0 (selected)

Select the band representing the

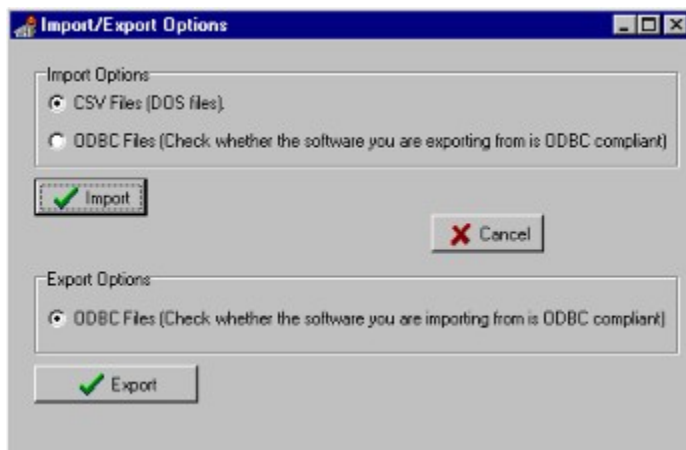
Header Band and the one representing the Footer Band. Select the Table/Query the report will rely on and select a datafield from the Table/Query which will represent the unique entry all other entries will be grouped by.

1. Detail Links. More complex and reliant on linking tables. Do not attempt this unless you are setting up sub detail bands.
1. Once you have completed your draft report you can view it by selecting Preview from the File Menu. If you wish to save it select save, load an old report select open from the file menu. The preview option also gives you the opportunity to print the report.

## Import and Export Data

You can import or export data to/from the personnel system by going into the database menu and selecting Import/Export Data or choosing the <Importing/Exporting Data> button.

You are currently allowed to import text from a comma seperated value file (CSV) or use Windows ODBC Drivers to translate between different file types (the ODBC drivers must be currently installed - look for ODBC32 in the windows control panel). ODBC allows the import and export of data to the Personnel files.



You may get an access error on exiting this program after using the ODBC drivers. Ignore the error as it has no effect on the program.

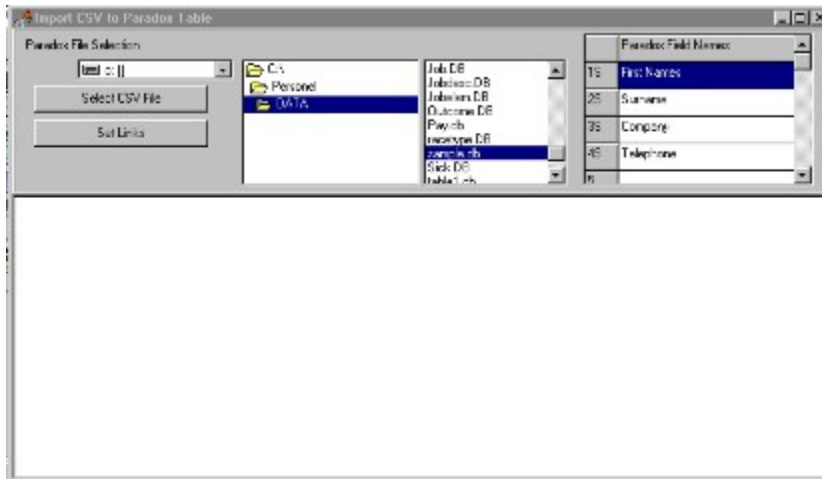
## CSV File Import

The CSV file format is common to many DOS based software although the format of the first few lines varies and may need to be manually edited in a text processor. On choosing this option you are given the opportunity to set up a standard format that can be used to import from similar files in the future. The stages for import are

1. Select CSV File to export from.
2. Select Paradox File to import to by pressing the <Paradox File> button.
3. Set up links and copy between the files by pressing the <Set Links> button.

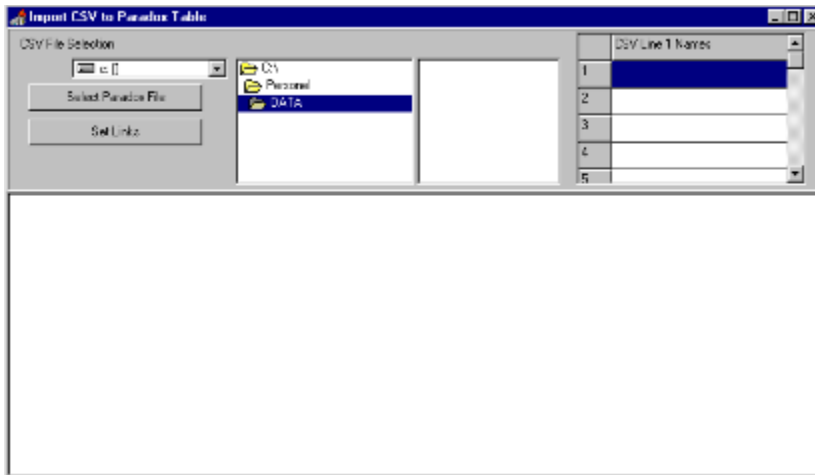
## Selecting the Paradox File

The paradox file is located in the same way as the CSV file by moving to the correct directory and selecting the file you wish to use for import.



## Select CSV File

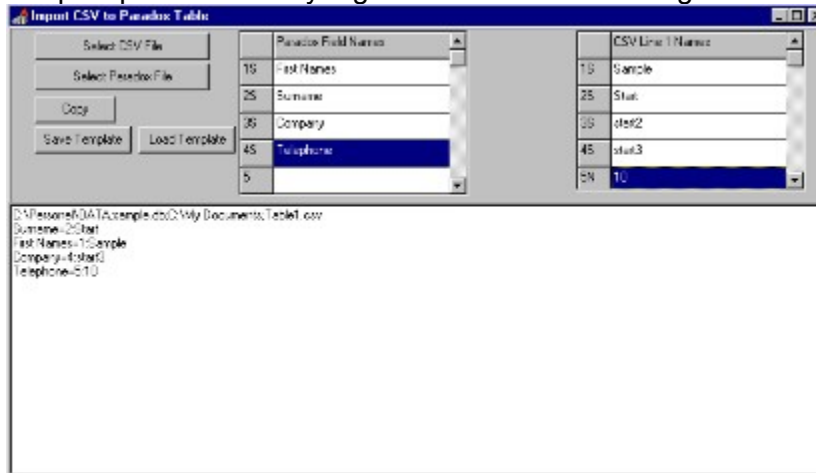
You start with the opportunity to select the CSV file. Choose the file by moving to the directory where the file is located and selecting the specific file from the file list that appears.



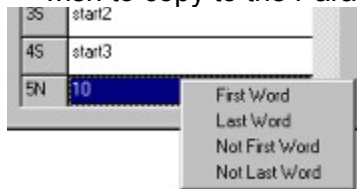
## Set Up Links and Copy to Paradox Table

You need to insert instructions on which fields to link between the 2 files. A list of the fields for each are given. The steps are:

1. Start by clicking on the paradox field. This appears in the box below.
1. Click on the field in the CSV box which will be copied to the Paradox field. You may decide to split up the field entry e.g. "John Smith" becoming "John" or "Smith".



1. By pressing the right mouse button on the CSV field you can select which part of the text you wish to copy to the Paradox field.



1. You can add a number of CSV field entries to one paradox field by pressing the left mouse button on each CSV field.

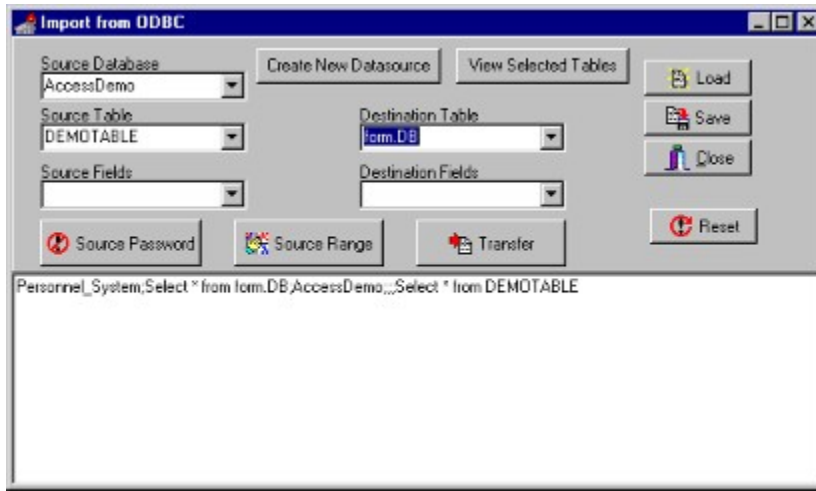
1. Repeat steps 1 to 4 to enter all fields to be copied to.
2. Select the <Copy> button to copy the field entries to the paradox records.

**You may decide that you will use the same format for future copying. Press the <Save Template> button and enter a file name for the template. To use in the future simply select <Load Template> to configure all the parameters you have set.**



## Import ODBC Files

On selecting this option you are shown the main file Import from ODBC screen.



You need to select the ODBC and Personnel tables you wish to use for the transfer.

1. Enter the source database drop down list and select a suitable source. You will be asked for the password and user id and possibly the driver connection if the connection does not work first time.

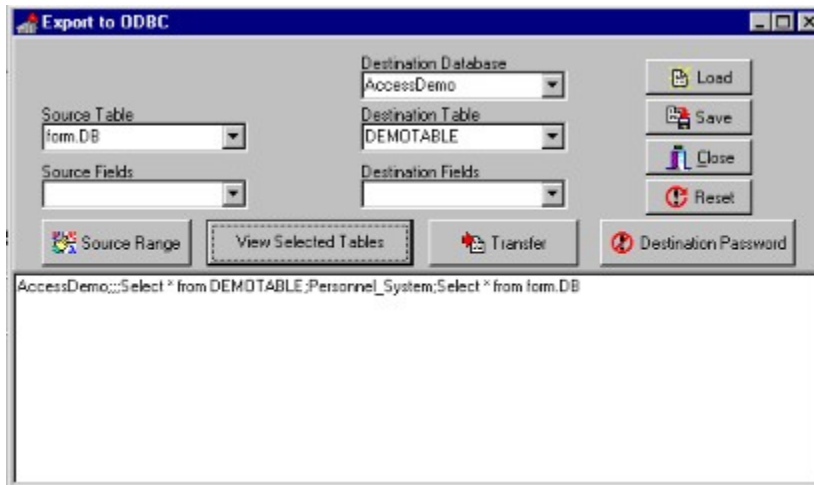
Select the source and destination tables from the table drop down lists. If you wish to view entries in the tables then click on the <View Selected Tables> button. If no tables exist or you do not have the appropriate table then you will need to create one:

- 1.1. Click on <Create New Datasource> button then select <Machine Data Source> tab.
  - 1.2. Click on <New> button.
  - 1.3. Press the <Next> button then follow instructions from 5 below.
  - 1.5. Using list of drivers. Click on Name that corresponds to the database you wish to use.
  - 1.6. Type in a file name - e.g. Sample. The click Next button.
  - 1.7. Click Finish.
  - 1.8. You are now are at the database selection screen. Click on the Select button.
  - 1.9. A Select database screen appears. Select the file by moving to the directory where the database is located and click on the database name.
  - 1.10. Click the OK button to complete entry.
1. As with [CSV file import](#) you need to select fields from a list for each table. The lists are drop down in this case.
  1. You may decide that you need to restrict the range of values you wish to copy from. Select the [Source Range](#) button.
  1. Once you have completed all operations press the <Transfer> button to start the copying operation.

You may wish to save the template you have created for the table links. Pressing the <Save> button will allow you to save to a file which can be later brought in by pressing the <Load> button.

## Export ODBC Files

On selecting this option you are shown the main file Import from ODBC screen.



You need to select the ODBC and Personnel tables you wish to use for the transfer.

1. Enter the destination database drop down list and select a suitable destination. You will be asked for the password and user id and possibly the driver connection if the connection does not work first time.

Select the source and destination tables from the table drop down lists. If you wish to view entries in the tables then click on the <View Selected Tables> button. If table does not exist then you will need to go into the ODBC Administrator:

- 1.1. From Desktop select Start then Programs then Personnel System.
  - 1.2. Click on ODBC Administrator.
  - 1.3. See Tabbed screen. Use User DSN.
  - 1.4. Click on Add button.
  - 1.5. Using list of drivers. Click on Name that corresponds to the database you wish to use.
  - 1.6. Type in a file name - e.g. Sample. The click Next button.
  - 1.7. Click Finish.
  - 1.8. You are now are at the database selection screen. Click on the Select button.
  - 1.9. A Select database screen appears. Select the file by moving to the directory where the database is located and click on the database name.
  - 1.10. Click the OK button to complete entry.
1. As with [CSV file import](#) you need to select fields from a list for each table. The lists are drop down in this case.
  1. You may decide that you need to restrict the range of values you wish to copy from. Select the [<Source Range>](#) button.
  1. Once you have completed all operations press the <Transfer> button to start the copying operation.

You may wish to save the template you have created for the table links. Pressing the <Save> button will allow you to save to a file which can be later brought in by pressing the <Load> button.

## Range SQL Expert

The screen below appears.

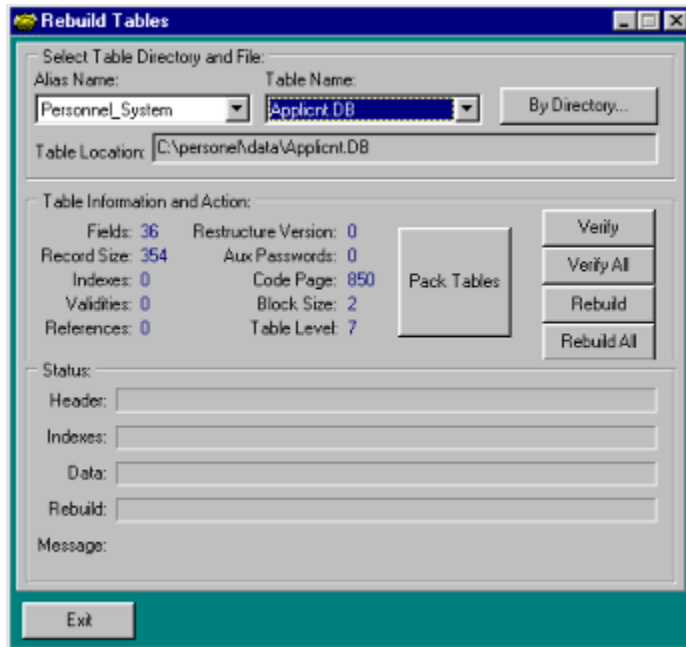
CustomersID	CompanyName	ContactFirstName
1	Sample	Neal
2	Sample	Richard

The SQL statement is shown in the large box and the field values in the grid. You can select conditions by choosing a field from the drop down list and setting acceptable values for the field. Press <Add Field> to complete entry. Or you can type in the SQL statement. Press the <Test> button to see if the selection works.

When you have completed the SQL statement press the <Close> button.

## Rebuild Tables

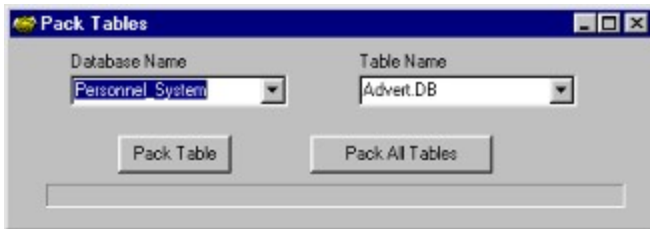
From here you can verify the tables contained in the database by pressing either the <Pack Tables> button to rebuild tables and indexes getting rid of redundant information or the <Verify All> button or press the <Rebuild All> button to repair any damaged database files.



Press the <Exit> button when you have finished with this.

## Pack Tables

If you press the < Pack Tables> button you will get the following screen.



If you wish to select one table to pack use the Table Name list to select the table and press the <Pack> button. If you wish to pack all the tables press the <Pack All Tables> button.

