

Employee Schedule Manual

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CIS 631

Table of Contents

Introduction.....	3
Requirements:	3
Setting up the Database.....	3
Using a New Database with Employee Schedule	10
Basic Navigation.....	16
Main Menu.....	17
Login.....	17
Logoff	17
Exit.....	17
Reports	17
Staff Report.....	17
Employee Report	21
Admin	22
Job.....	22
Employee	26
Employee	26
Employee Job.....	29
Schedule.....	32
Schedule.....	32
Vacation	41
Help.....	46

Introduction

Congratulations on purchasing our Employee Schedule program. We hope that Employee Schedule will help manage your employee's schedules and job functions more efficiently and with ease. The manual is divided into various sections including: Setting up the Database, Using a New Database with Employee Schedule, Basic Navigation, Main Menu, Reports, Admin, and Help. We recommend that administrators read the entire manual before using the system.

Requirements:

There are several tools/programs which need to be installed to use this program.

Tools Needed	Location
Operating System:	Windows XP or Windows 2000 www.microsoft.com
Database	Microsoft Access www.microsoft.com
Java SDK	Java 2 SDK 1.4.2_03 or later www.sun.java.com http://java.sun.com/j2ee/1.4/download.html The tested version was: 1.4.2_03
Adobe PDF Format	http://www.adobe.com/ <i>(This is used to view the documentation.)</i>

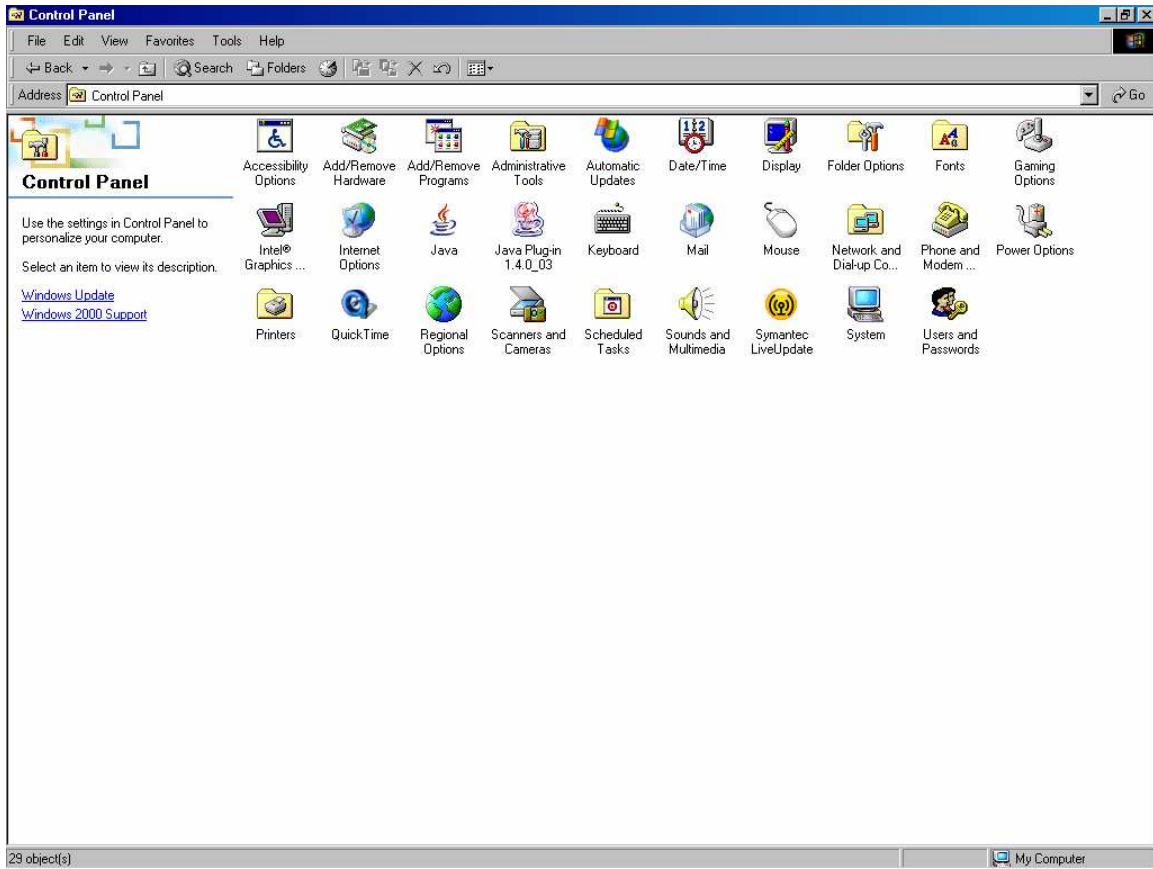
The minimum hardware requirements include:

Component	Requirements
CPU	Pentium 4 2GHz
Memory	256 Mb
Hard Drive Space	40 Mb
Printer	Laser, Ink Jet, Bubble Jet

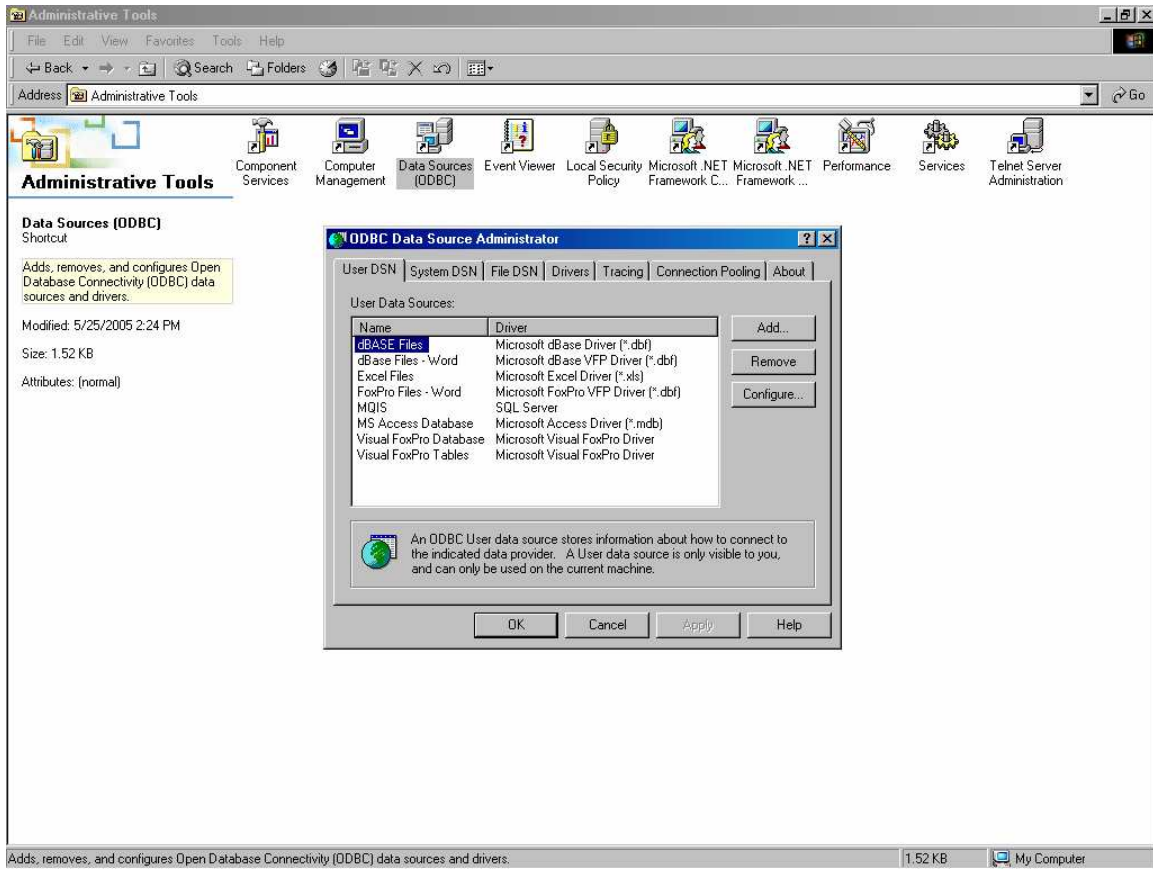
Setting up the Database

Windows 2000/ Windows XP:

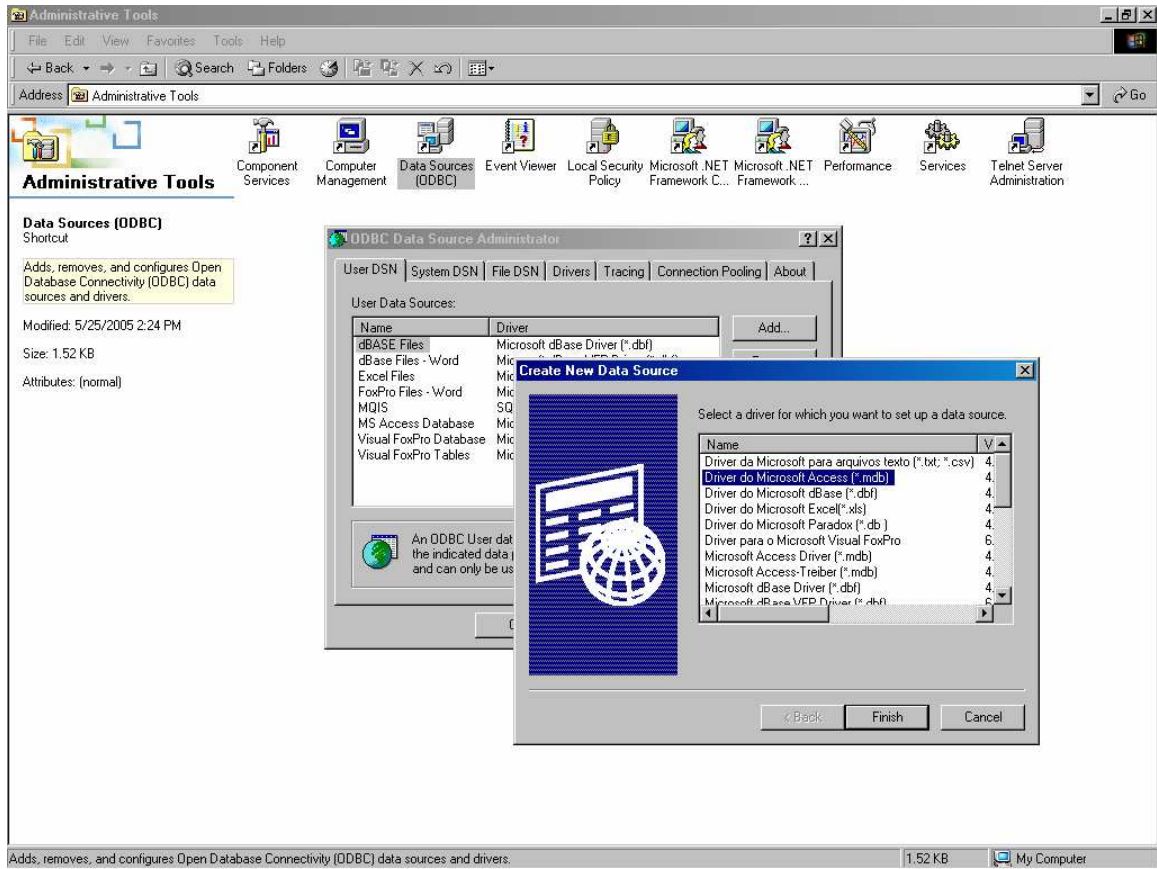
1. Go to Control Panel



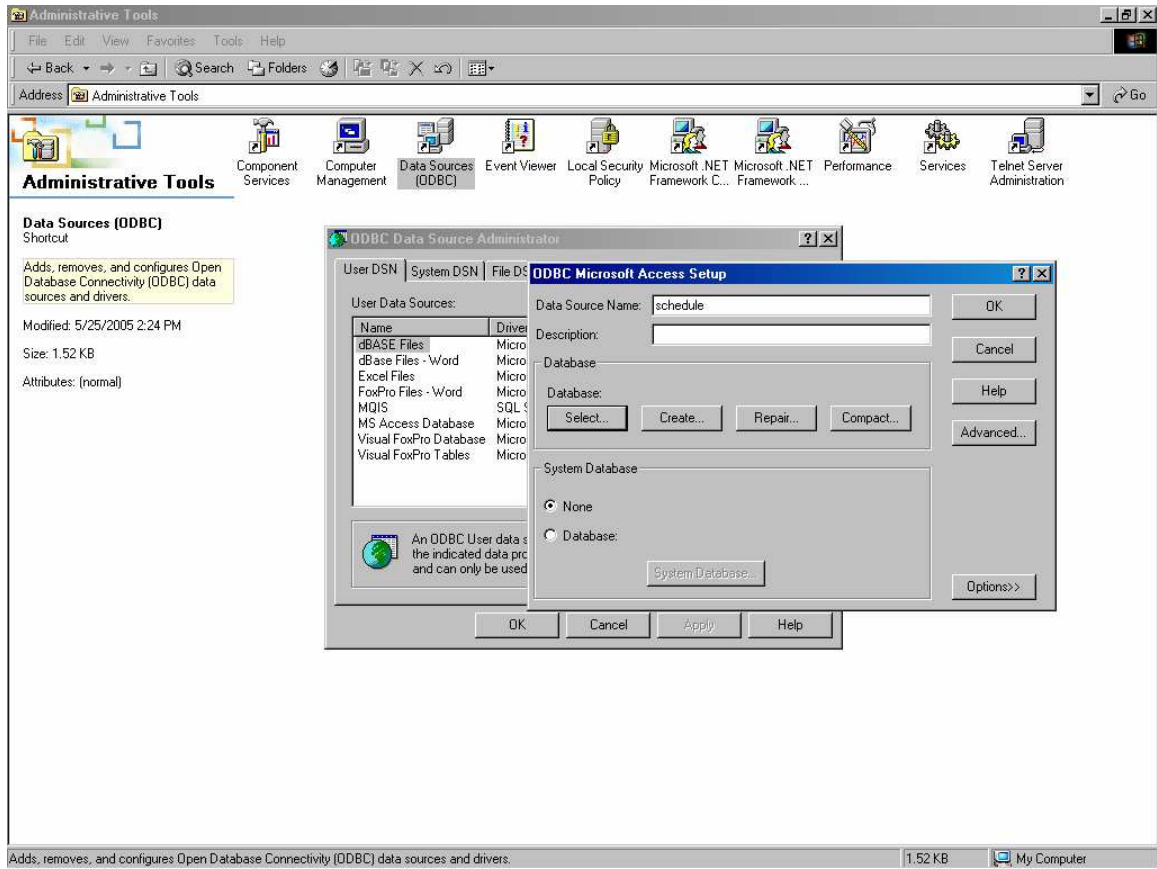
2. Click on Administrative Tools



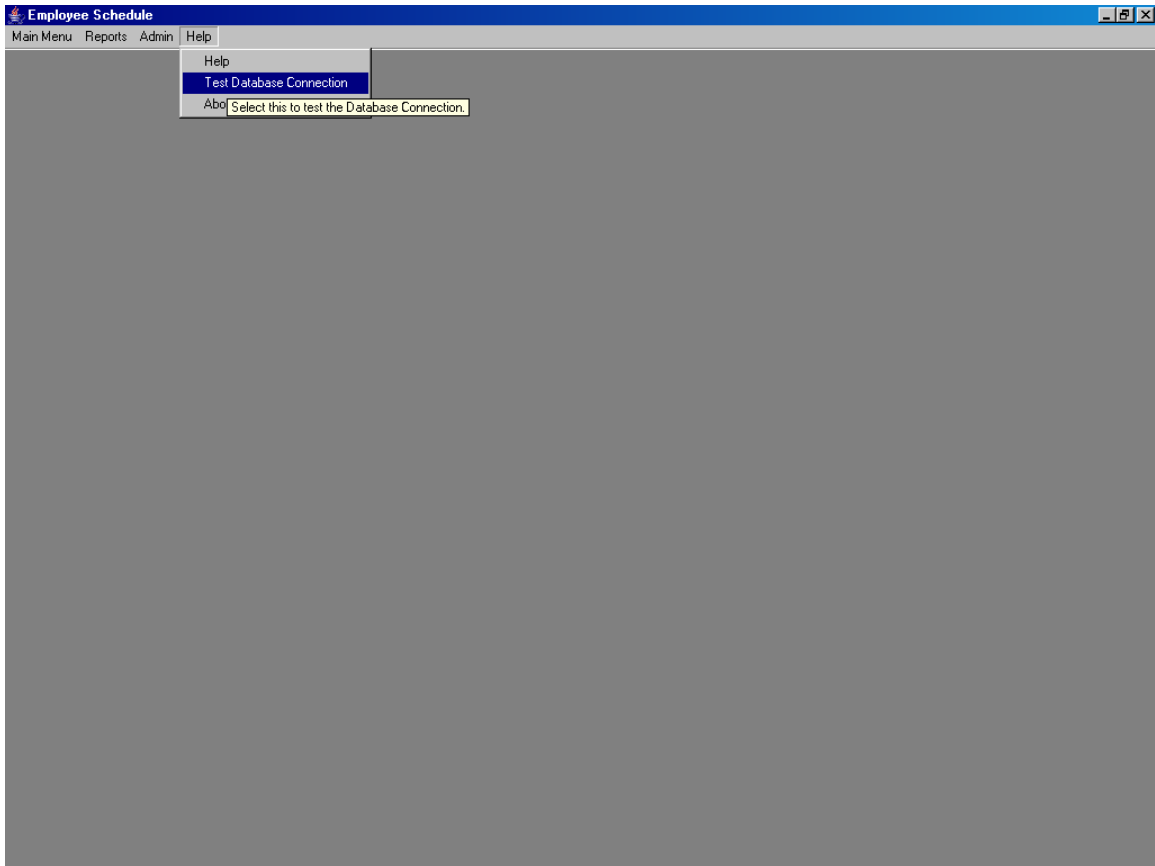
3. Click on Data Source (ODBC)
4. Click "Add..."



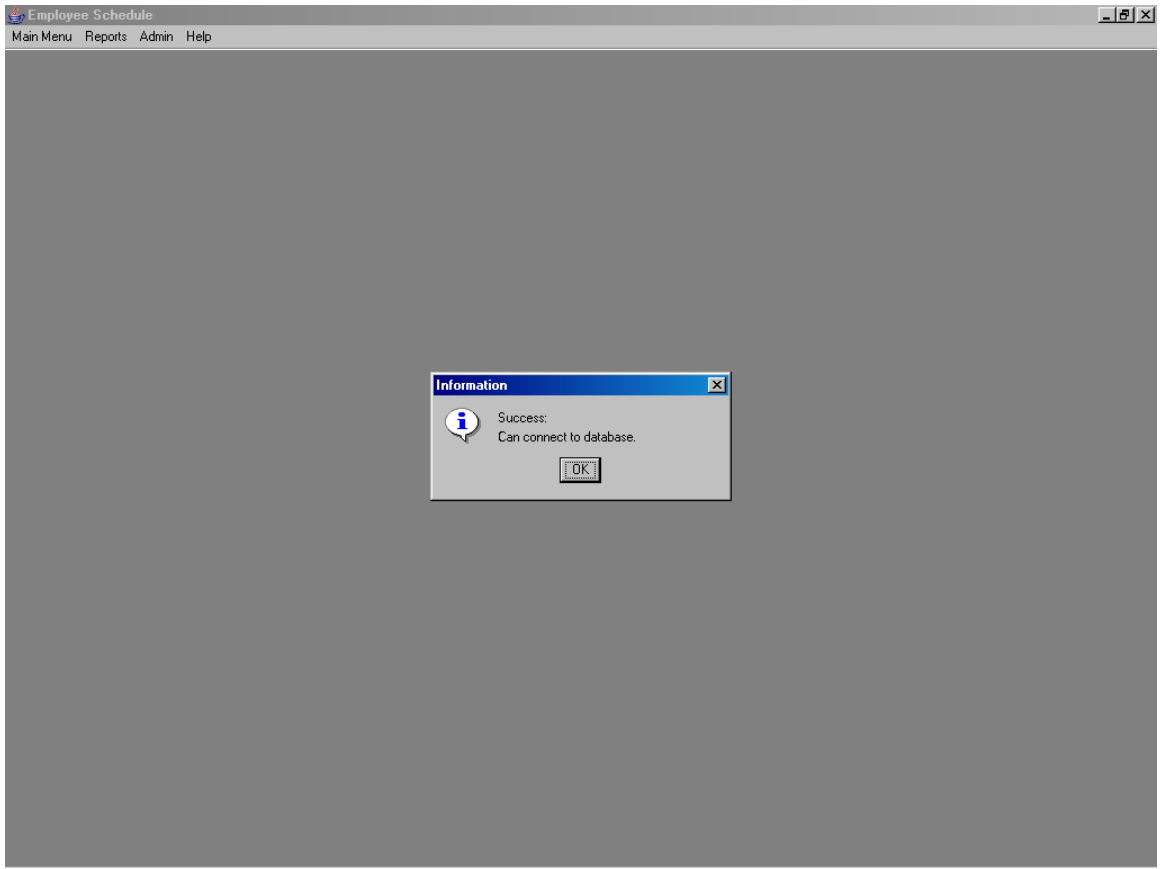
5. Select Driver for Microsoft Access [*.mdb]
6. Click Finish.



7. Type “schedule” in the “Data Source Name” field.
8. If the database exists, press the select button. Locate the database and add it to the system. Click “OK” when you are done. Go to step 10.
9. If the database does not exist, hit create. Give the database a name and a location. Click “OK” when you are done.
10. Click “OK” to save the changes.
11. Go to the schedule program location and click on the schedule application.

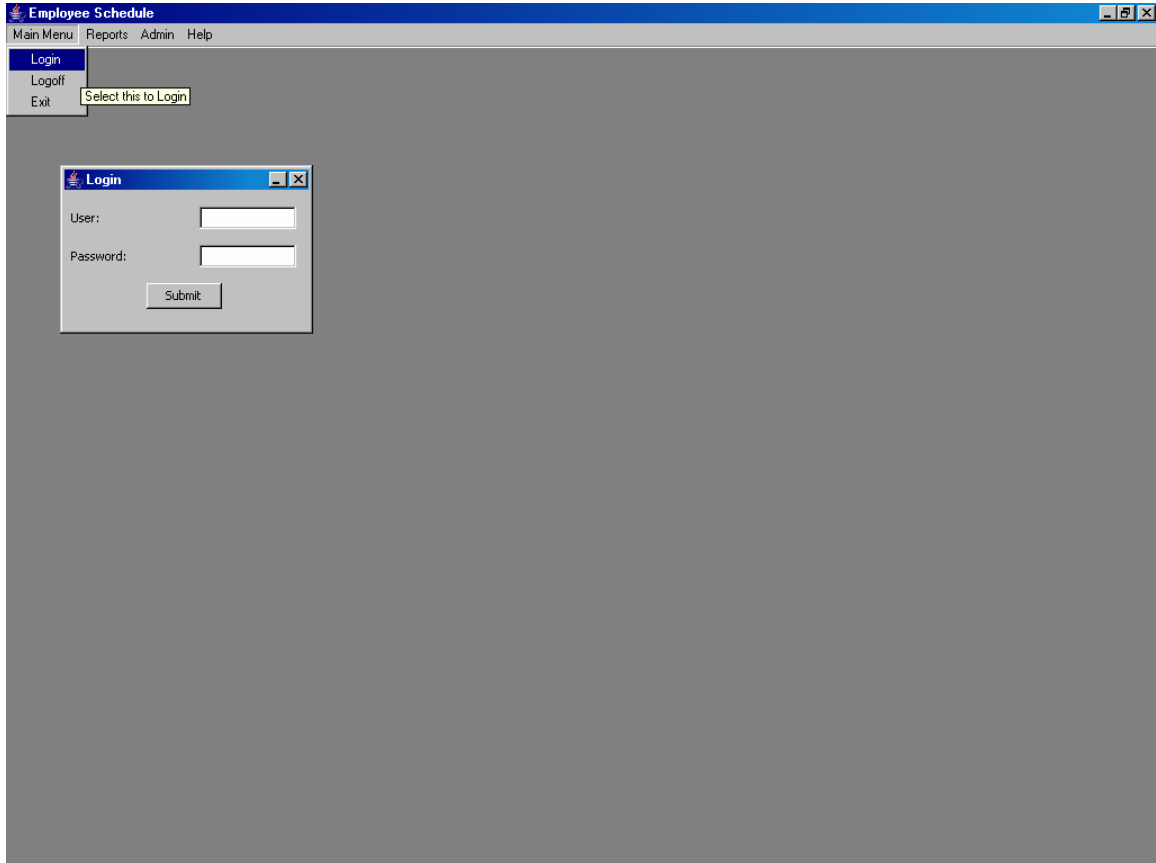


12. Go to the help menu and press "Test Database Connection".
13. You should receive the message: "Success: Can connect to database." If you do not receive this message then you may want to check that the database name is "schedule".

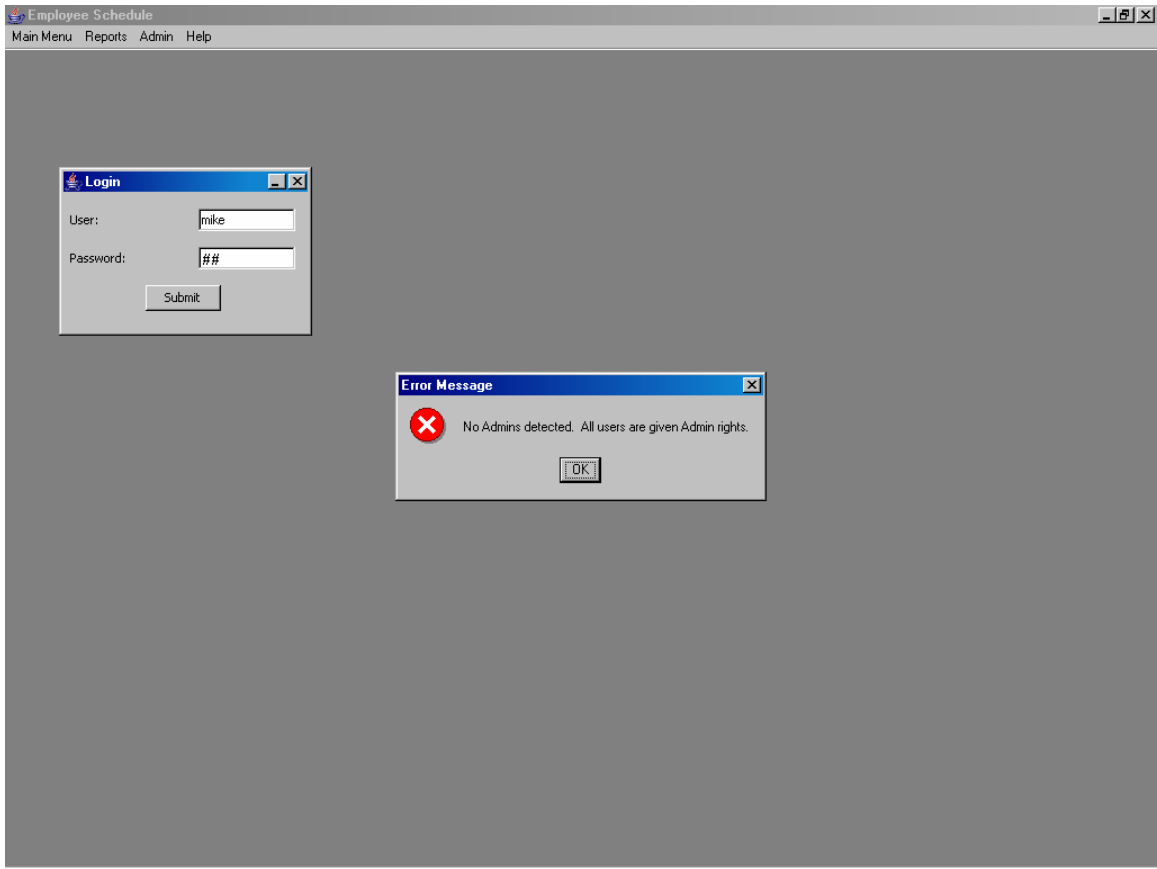


Using a New Database with Employee Schedule

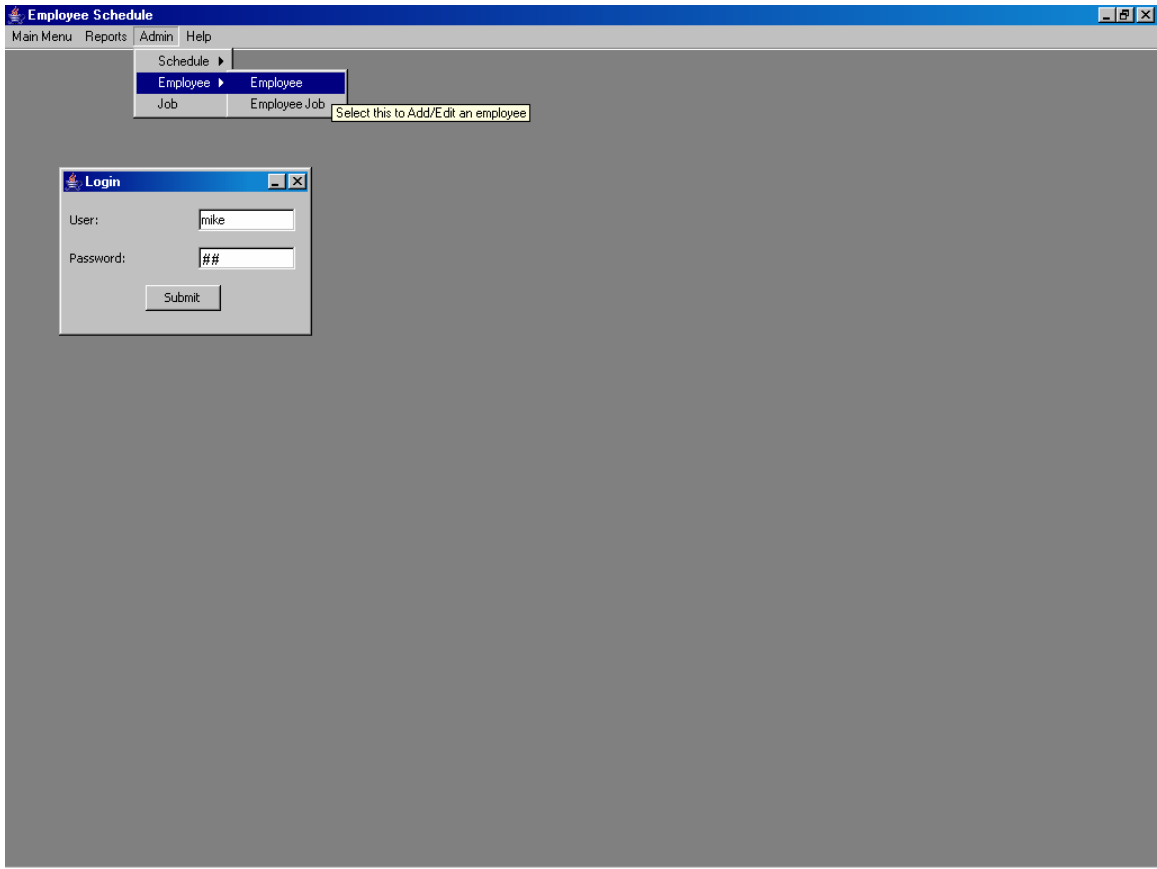
All users must login in to use the system. Go to the main menu and click on “Login.” The login menu should appear.



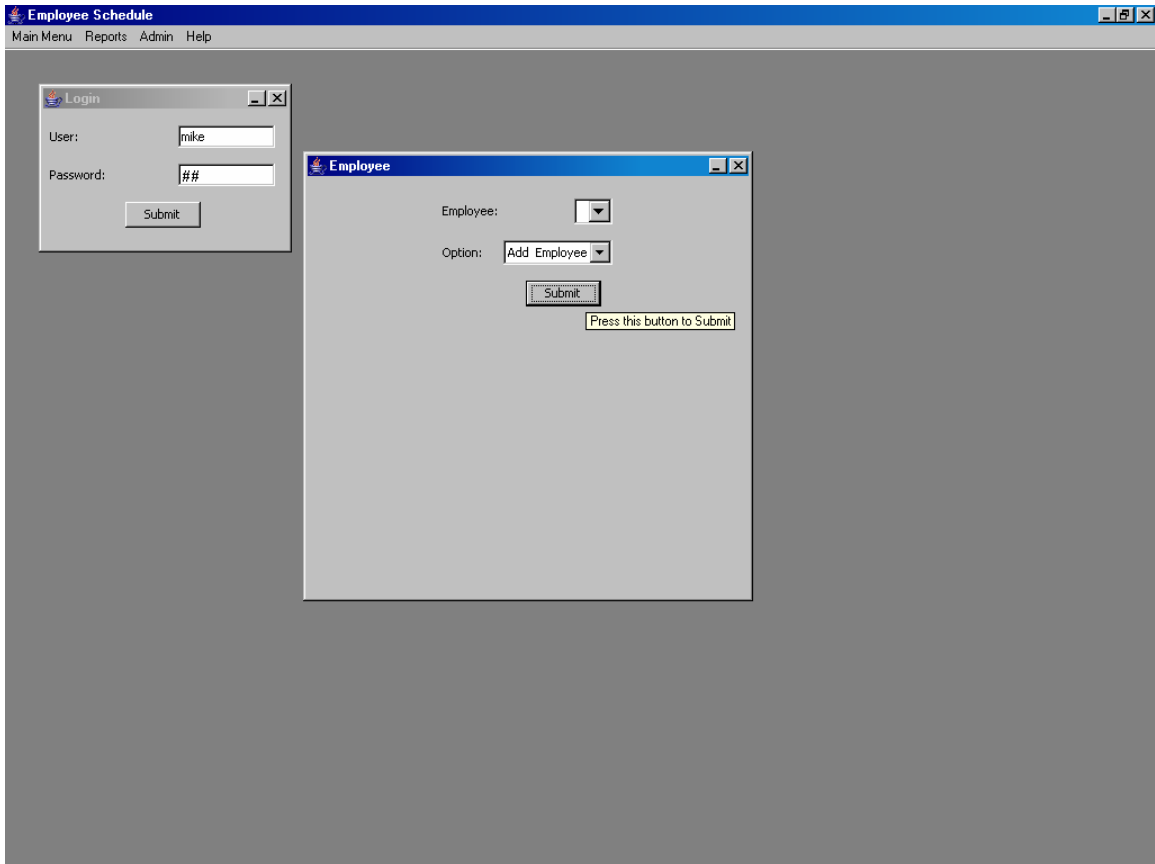
Type any user name and password for the login. Click “Submit.” The following message: “No Admins detected. All users are given Admin rights” should appear. Click “OK” to continue.



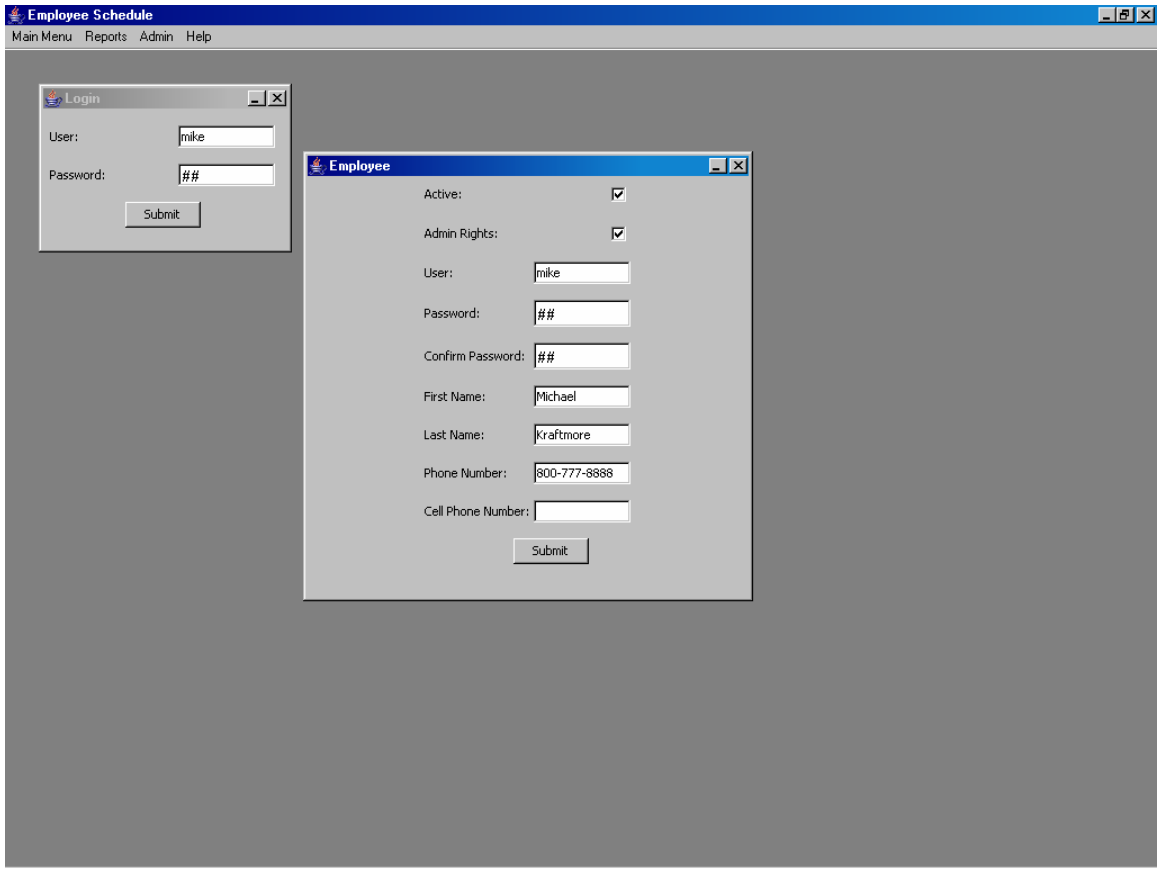
Go to the Admin menu and select the Employee sub-menu. Click on Employee to add a new employee.



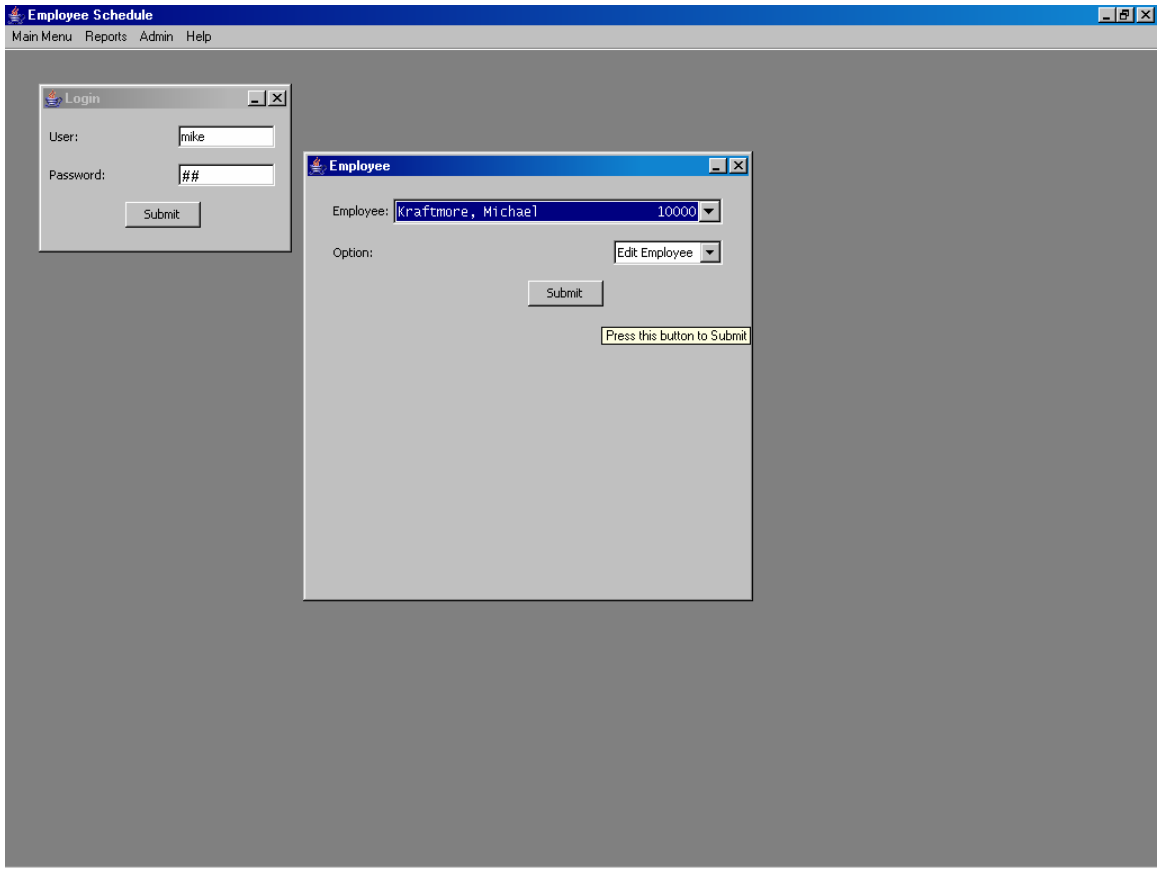
Change the Option to “Add Employee” and click on “Submit.”



The Add Employee window will appear. Supply a user name, password, first name, last name, and phone number. If the user should have administrative rights, put a check mark in the box next to Admin Rights. If the user is active (default), make sure there is a check box in the active field. Click "Submit" when done. A box will either report success "Success: New Employee Added" or it will report an error. Click "OK" to finish.



The original Employee window will appear.



More employees can be added or edited from this window. For more information see the Employee menu section.

Basic Navigation

The Employee Schedule program consists of four menus: Main Menu, Reports, Admin, and Help which lies on the top line of the program. These four menus contain sub menus.

Main Menu

- Login
- Logoff
- Exit

Reports

- Staff Report
- Employee Report

Admin

- Schedule
- Employee
- Job

Help

- Help
- Test Database Connection
- About

Main Menu

The main menu contains the following options: login, logoff, and exit.

Login

Login is used to log into the system. The user must supply a valid username and password to be able to access the features in the program. If a user has user rights, they can access the Reports menu. If a user has administrative rights they can access the Reports and Admin menus. All users can access the Main and Help menus.

Logoff

Users can logoff the system by clicking this option.

Exit

Users can exit the program by clicking this option.

Reports

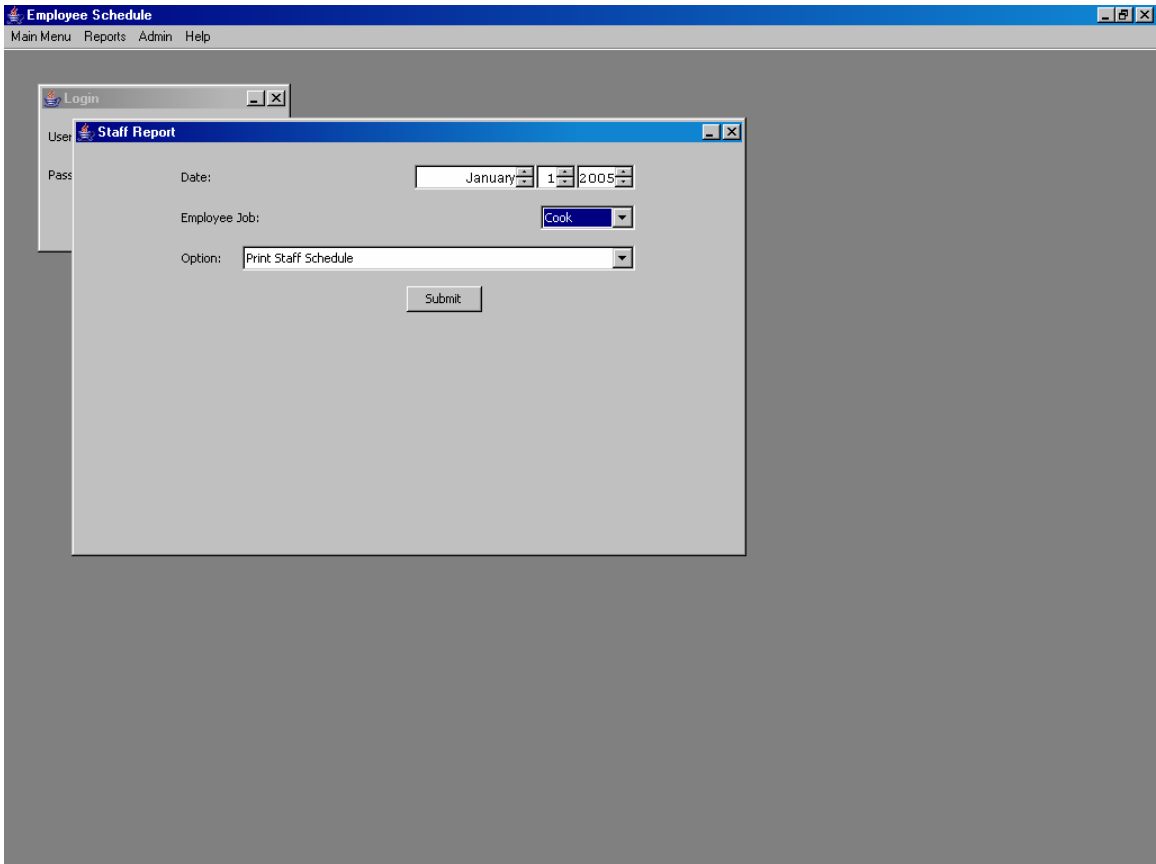
The Reports menu contains the Employee and Schedule Reports options.

Staff Report

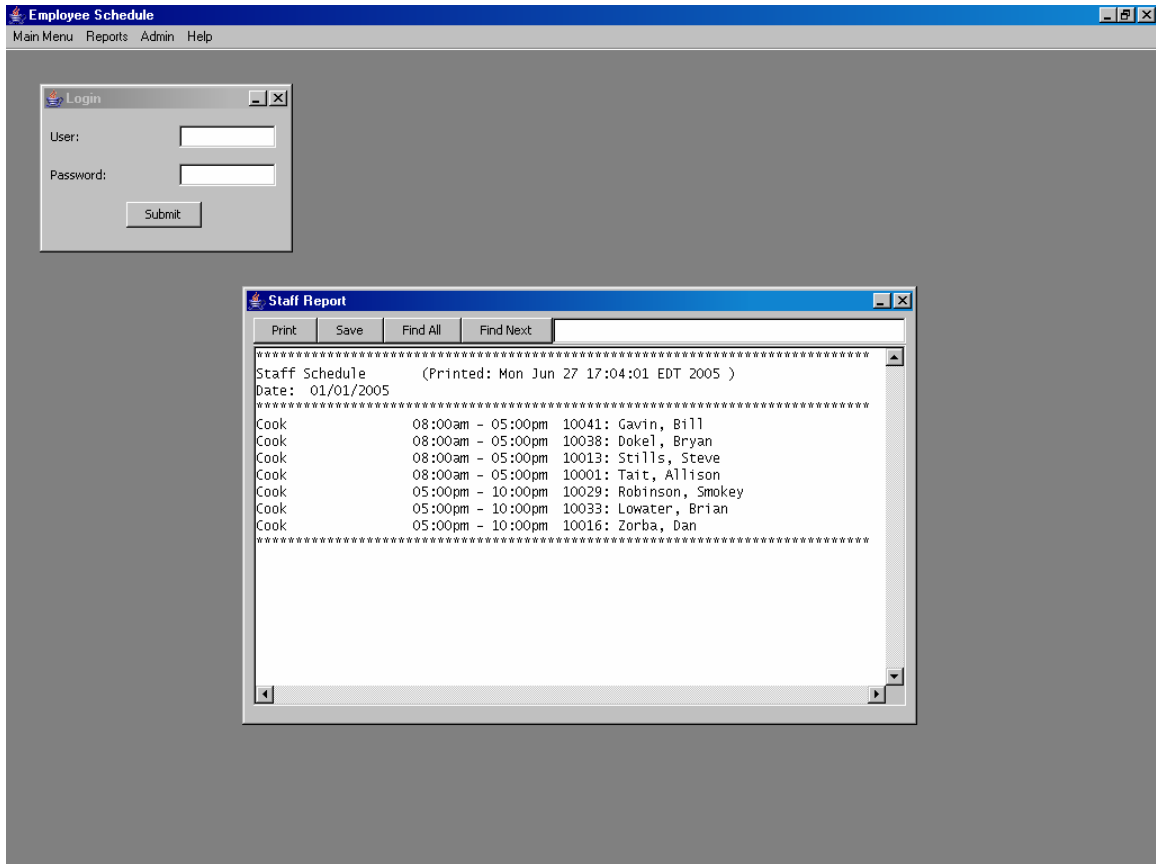
The Staff Report will open the Staff Report window, which contains the following options:

- Print Staff Schedule
- Print Staff Available
- Print Staff Info Active
- Print Staff Info InActive
- Print Staff Info
- Print Staff Schedule Order by start time, job name, employee name
- Print Staff Schedule Order by start time, employee name, job name
- Print Staff Schedule Order by job name, start time, employee name
- Print Staff Schedule Order by job name, employee name, start time
- Print Staff Schedule Order by employee name, start time, job name
- Print Staff Schedule Order by employee name, job name, start time

The user must fill in the Date. Users can either leave the Job Name blank or fill in a value. For example, it is possible to print the Staff Schedule for the Cooks on January 1, 2005.



The results appear after clicking "Submit".



From this menu, the user has the following options:

- Print: Print the results to the printer
- Save: Save the results to a file.
- Find All: Search for all the values which equal the value in the text window to the left.
- Find Next: Search for the next value which equals the value in the text window to the left.

Below is an example of the Find All search on the value "Dokel".

Login

User:

Password:

Submit

Staff Report

Print Save Find All Find Next Dokel

Staff Schedule (Printed: Mon Jun 27 17:04:01 EDT 2005)

Date: 01/01/2005

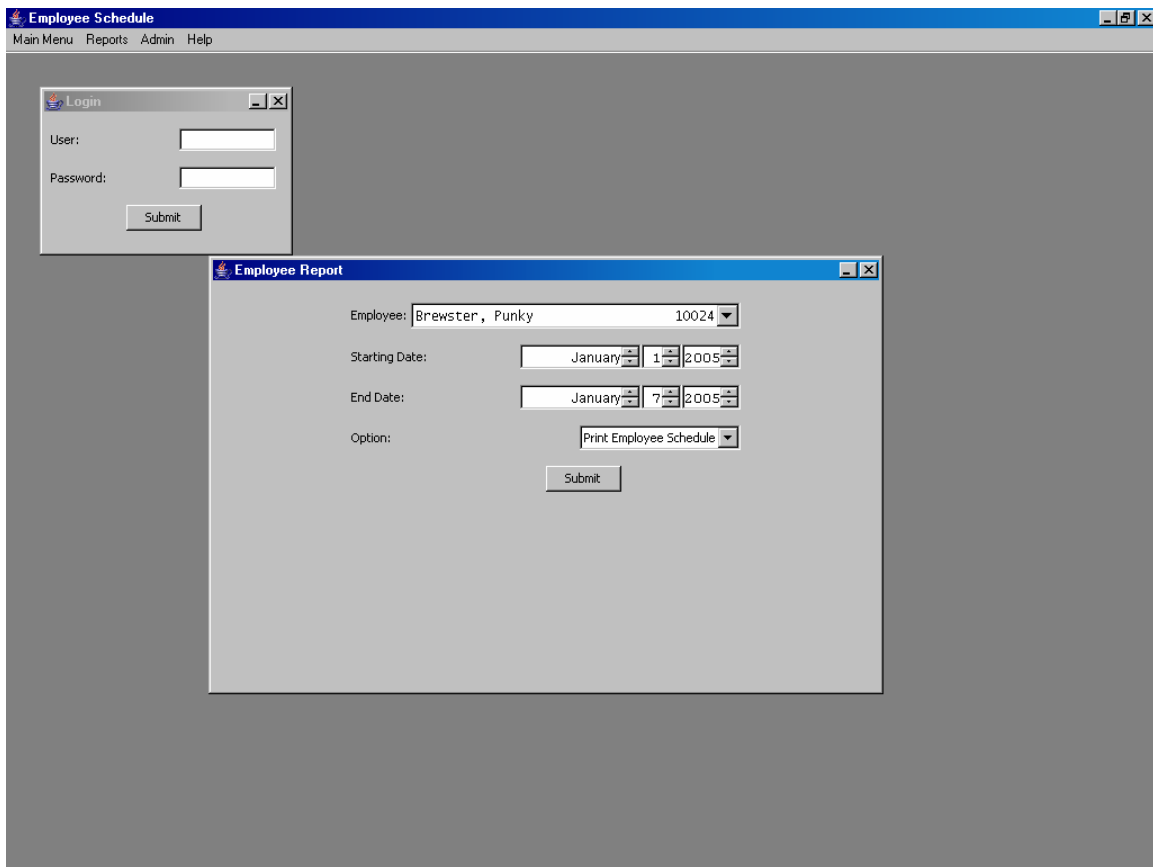
Cook	08:00am - 05:00pm	10041: Gavin, Bill
Cook	08:00am - 05:00pm	10038: <u>Dokel</u> , Bryan
Cook	08:00am - 05:00pm	10013: Stills, Steve
Cook	08:00am - 05:00pm	10001: Tait, Allison
Cook	05:00pm - 10:00pm	10029: Robinson, Smokey
Cook	05:00pm - 10:00pm	10033: Lowater, Brian
Cook	05:00pm - 10:00pm	10016: Zorba, Dan

Employee Report

The employee Report will open the Employee Report window, which contains the following options:

- Print Employee Schedule
- Print All Employee Info

It works very similarly to Staff Schedule except that includes details for only one individual. This window is useful for employees who want to print out their schedule. In the following example, Punky Brewster wants to print out her schedule from January 1st to January 7th.

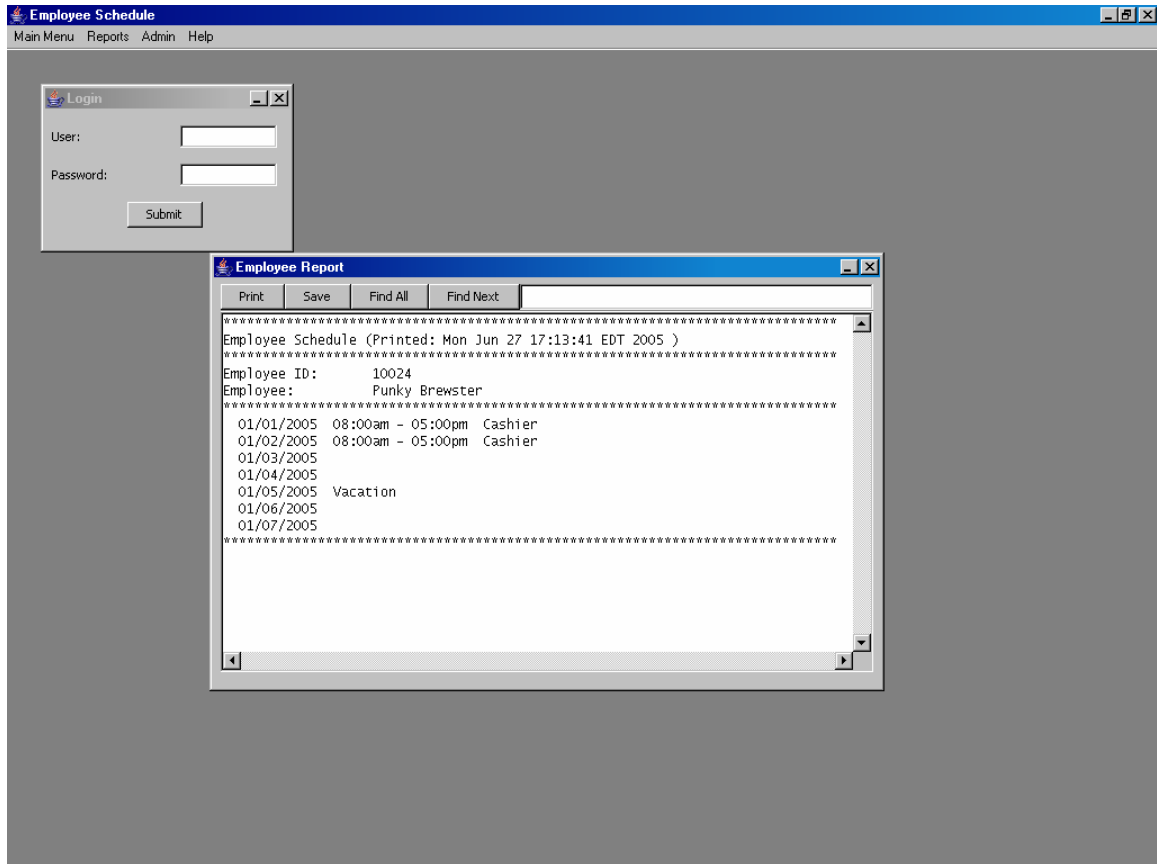


The screenshot shows a software application window titled "Employee Schedule" with a menu bar containing "Main Menu", "Reports", "Admin", and "Help". A "Login" dialog box is open in the top-left corner, featuring "User:" and "Password:" input fields and a "Submit" button. The main "Employee Report" window is open in the foreground, displaying the following fields:

- Employee: Brewster, Punky 10024
- Starting Date: January 1, 2005
- End Date: January 7, 2005
- Option: Print Employee Schedule

A "Submit" button is located at the bottom of the "Employee Report" window.

She will receive the following result:



From this menu, the user has the following options:

- Print: Print the results to the printer
- Save: Save the results to a file.
- Find All: Search for all the values which equal the value in the text window to the left.
- Find Next: Search for the next value which equals the value in the text window to the left.

Admin

The Admin menu contains the following options:

- Schedule
- Employee
- Job

Job

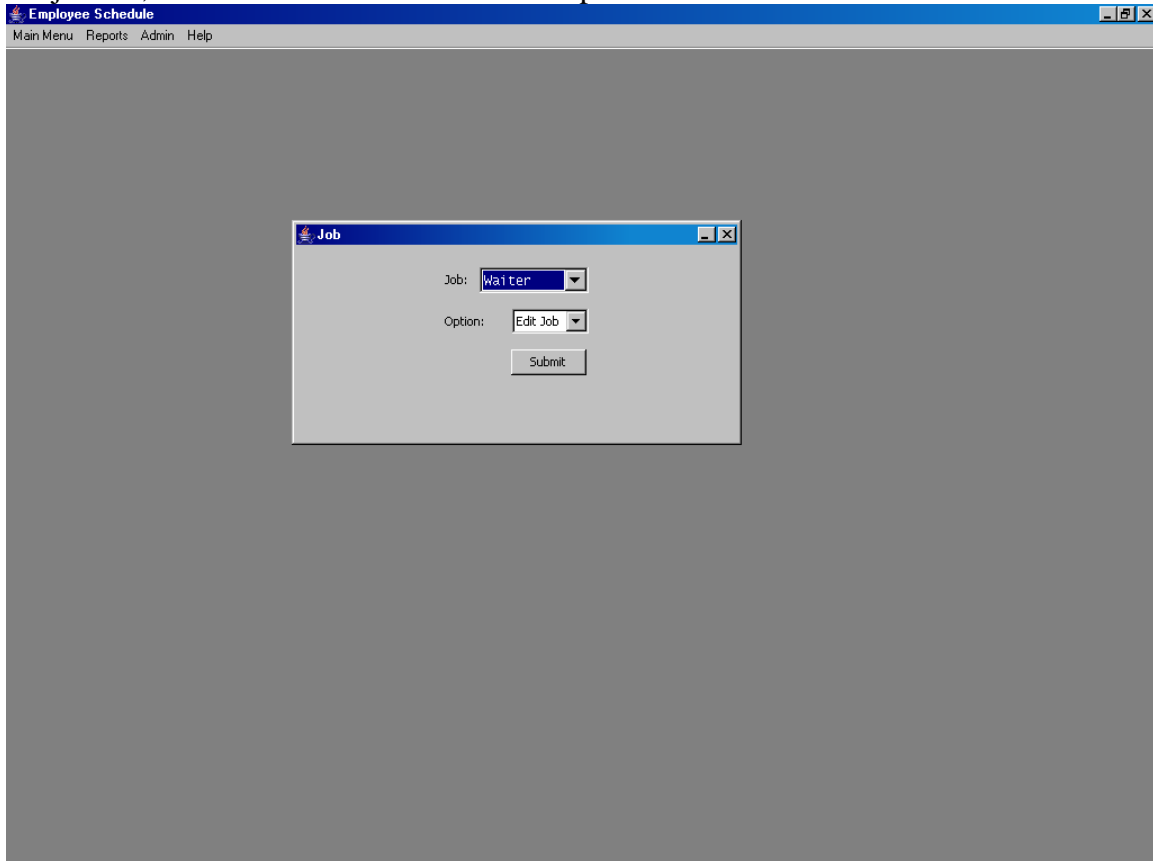
The Job menu contains the following options.

- Add Job: Add a new job to the system.
- Edit Job: Edit an existing job (Change name, Change Active/Inactive.)

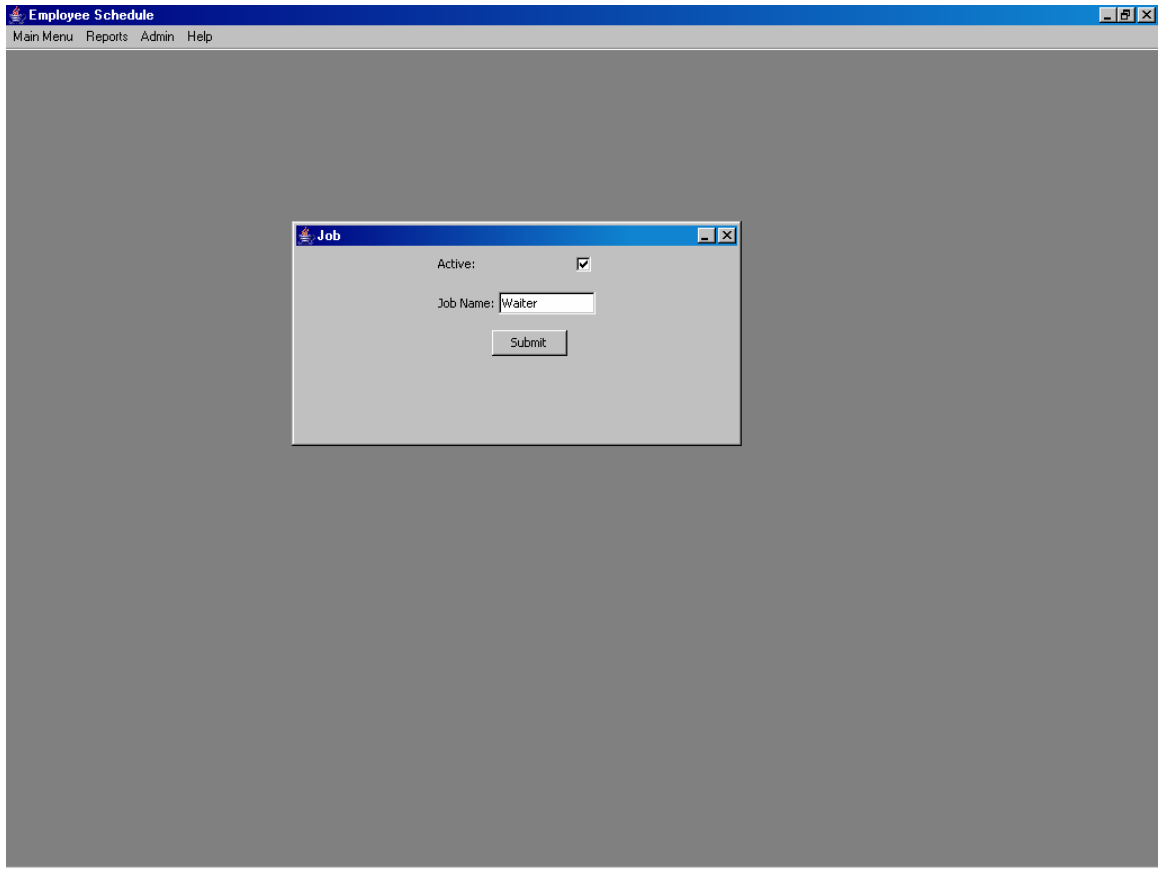
Each job has two fields:

- Active: Selected the Job will appear as a valid choice in the system. Deselected the Job will only appear in the Job Admin menu.
- Job Name: The name of the job.

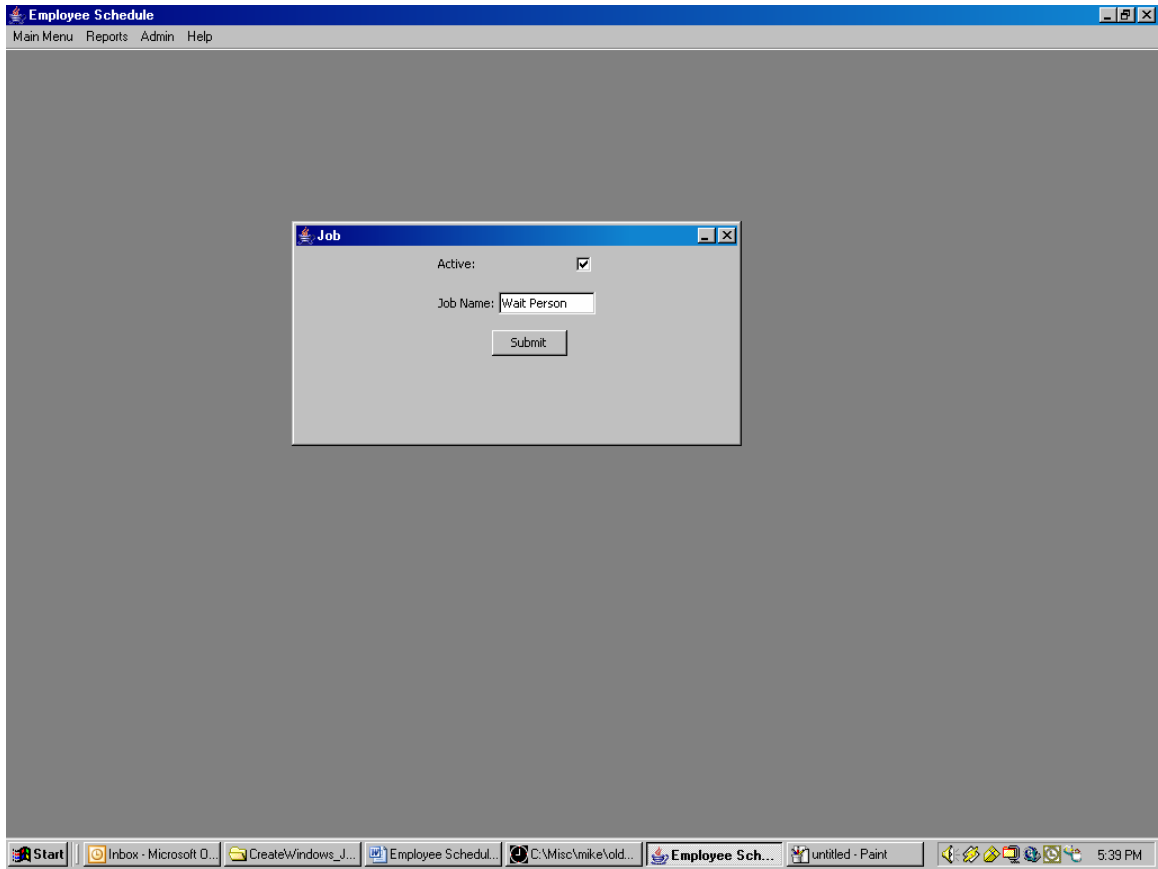
In the following example, the admin is editing the Waiter job. “Waiter” is selected from the job list, “Edit Job” is selected from the Option list.



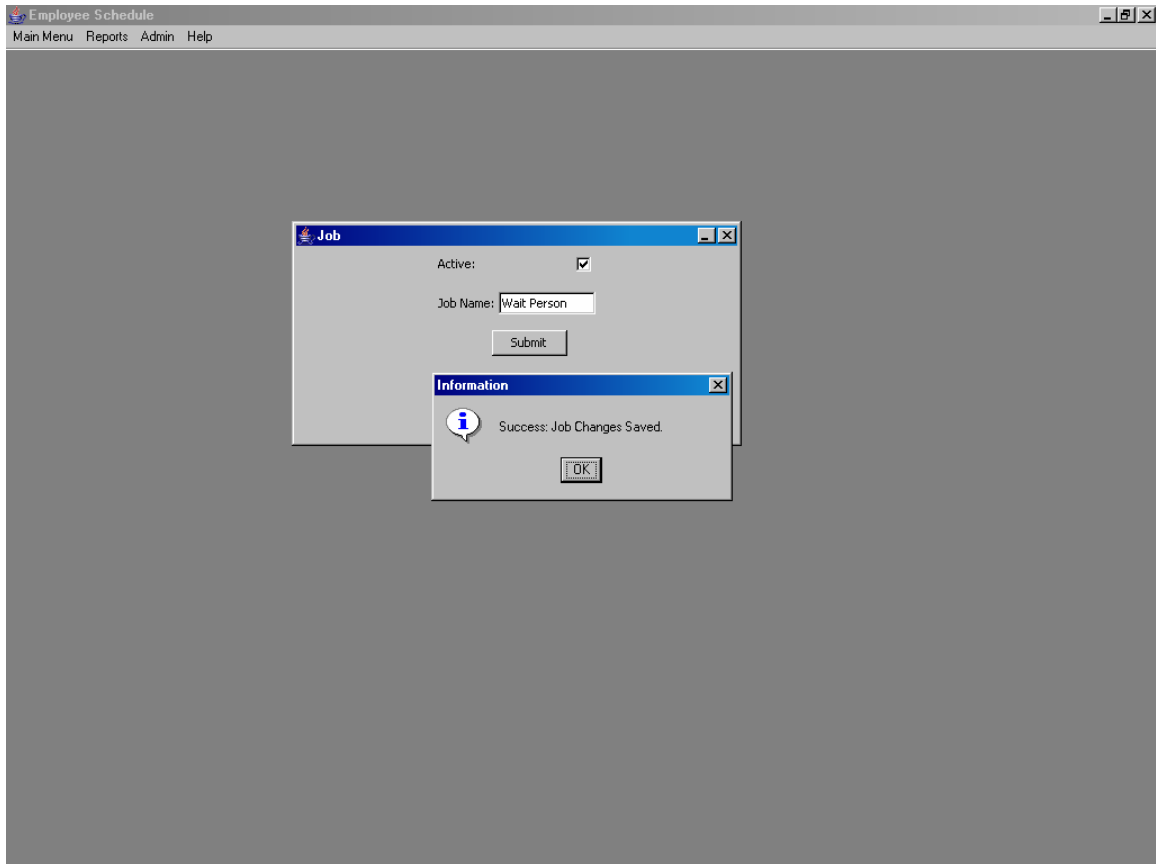
After pressing “Submit,” the following window appears.



The admin changes the job name from “Waiter” to “Wait Person.”



When the Admin presses “Submit”, a confirmation window appears stating that the change was successful. The admin presses “OK” and the starting window appears.



Employee

The Employee menu has two submenus:

- Employee: Add and Edit Employee Information.
- Employee Job: Add and Edit Employee Job Information.

The Employee submenu will display a window for adding and editing Employee information. The Employee Job submenu will display a window for adding and editing the Jobs that a particular employee holds. Employee Schedule allows employees to hold more than one job. For instance an employee can be a dishwasher, cook, and bus boy.

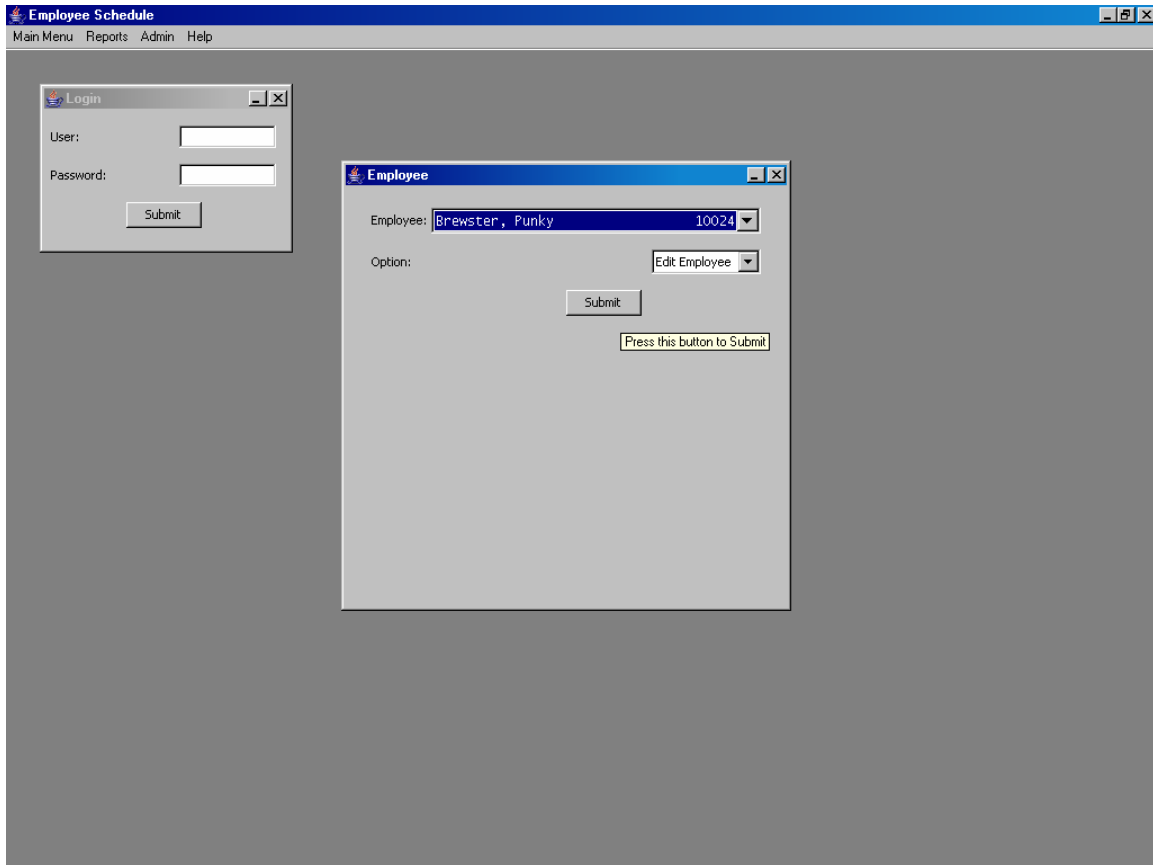
Employee

Each employee record has multiple fields: Active, Admin, User Name, Password, First Name, Last Name, Phone Number, and Cell Phone Number.

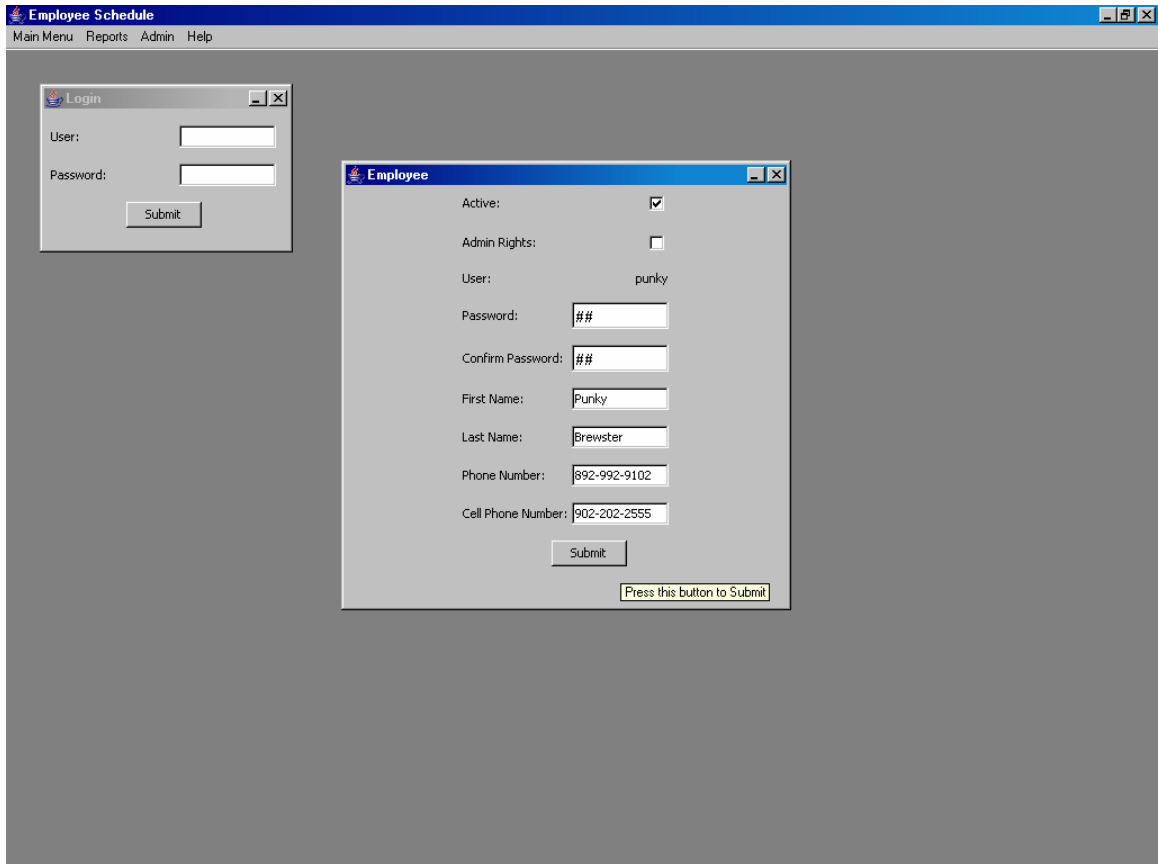
- Active: Selected the employee is active in the system. Deselected the employee is historical.
- Admin: Selected the employee has administrative rights. Deselected the employee has restricted rights.
- User Name: The name used to login into the system. Must be unique.
- Password: The password used to login into the system. It can not be blank.
- First Name: The employee's first name. It can not be blank.

- Last Name: The employee’s last name. It can not be blank.
- Phone Number: The employee’s primary phone number. It can not be blank.
- Cell Phone Number: The employee’s cell phone number. It can be blank.

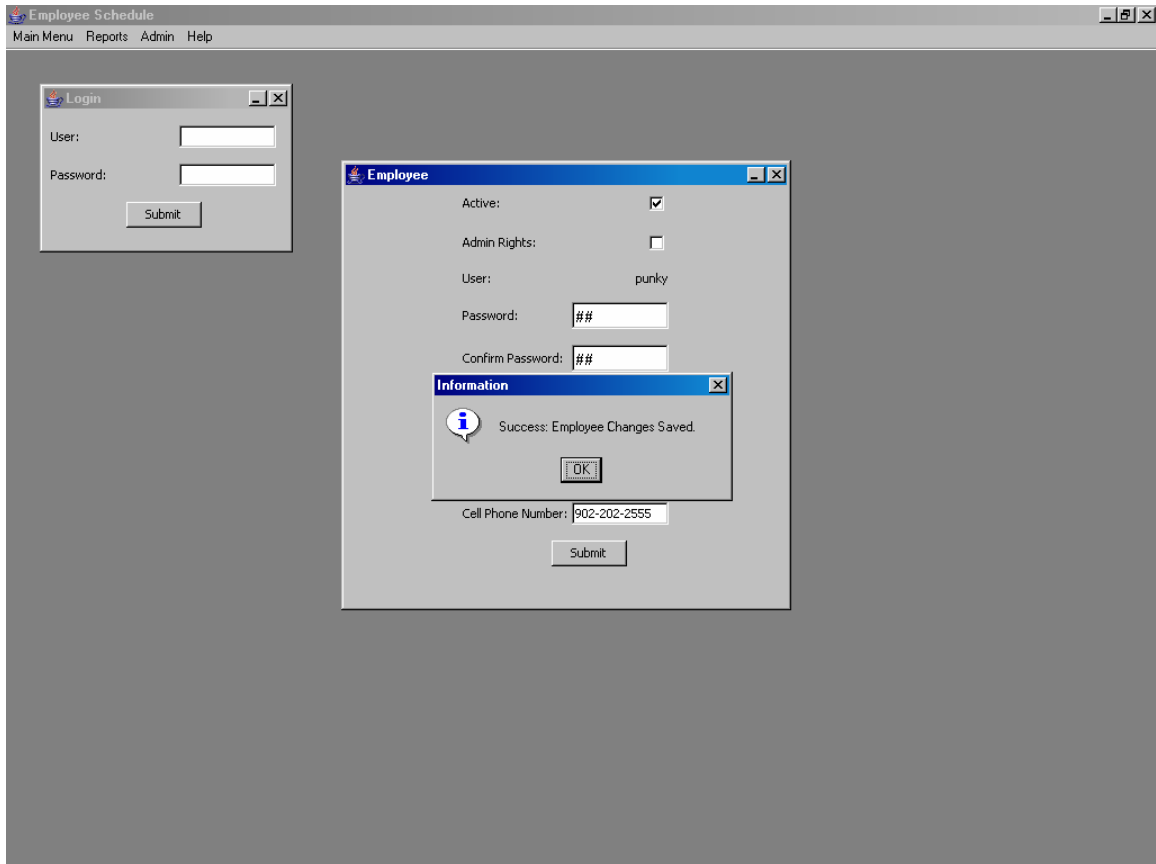
When the admin clicks on the employee submenu, the Employee window will appear. From this window, the admin can add or edit employee information. In this particular example, the admin wants to edit Punky Brewster’s employee information. The admin selects “Brewster, Punky 10024” from the Employee list, and selects “Edit Employee” from the Option list. Then the admin clicks on the submit button.



Punky Brewster’s user data will appear. The admin can change all the employee information in this window except for the user name.



When the admin is done making changes, the submit button can be pressed. A notification message will appear telling the admin that the changes were successful or that there was an error.



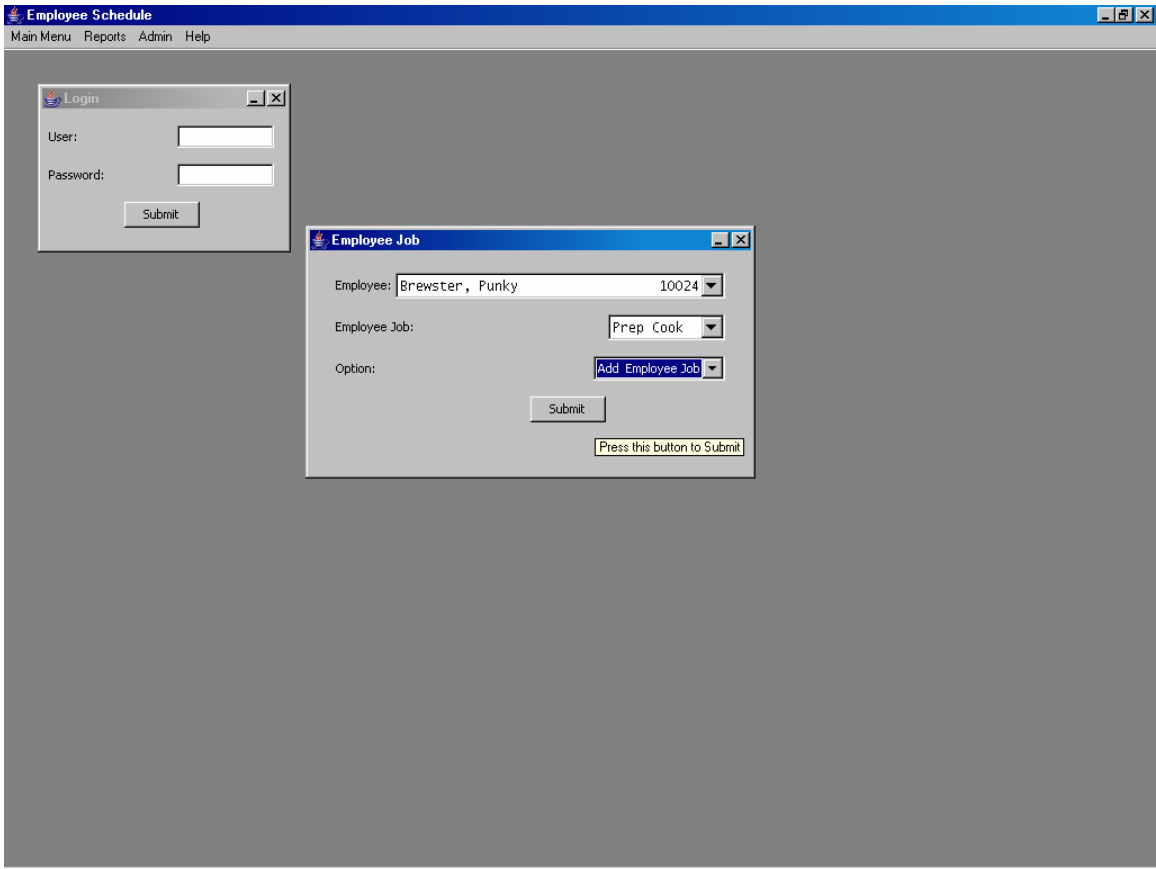
The admin can press “Ok” to continue. In this particular example, the starting employee window will appear.

Employee Job

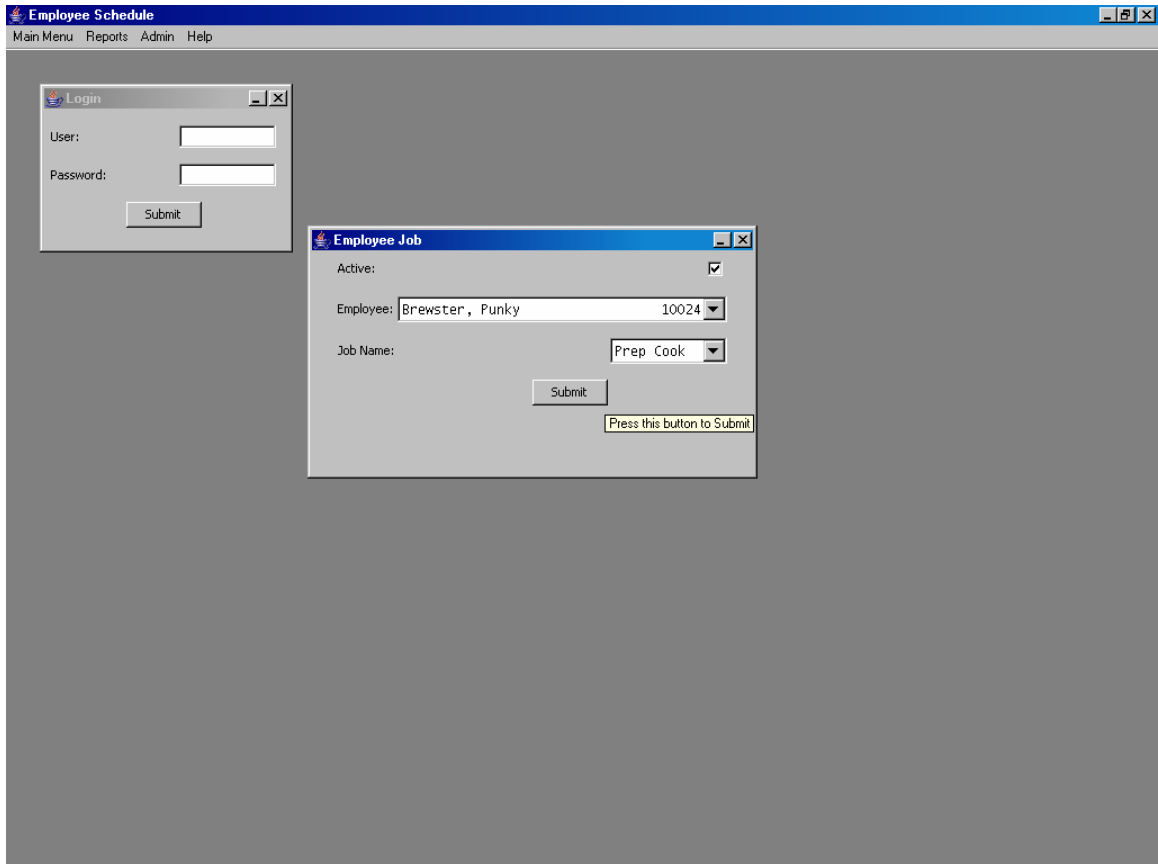
Each employee can have multiple jobs. The Employee Job window is used to assign and edit the jobs an employee holds. An Employee Job record consists of three fields:

- Active: Selected employee can work this job. Deselected employee can not work this job.
- Employee: Name of the Employee.
- Job: Job that the employee performs.

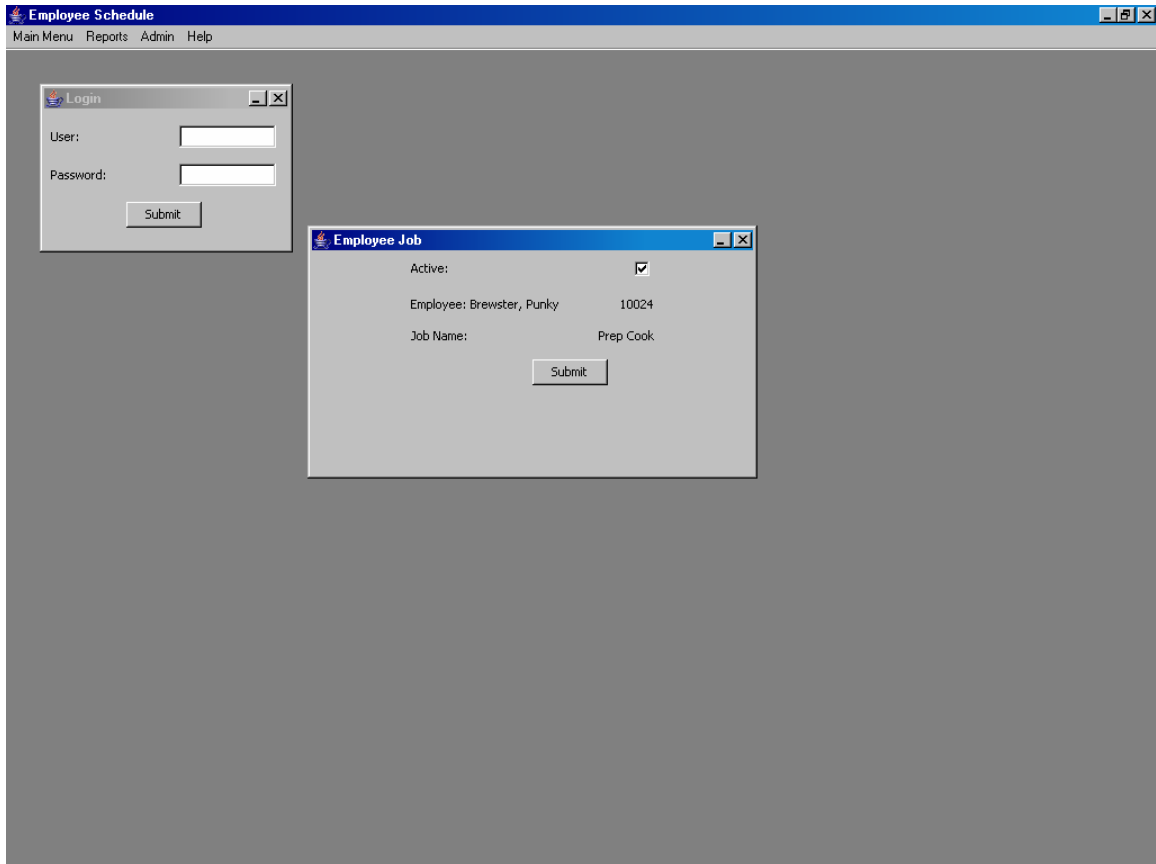
In the below example, the admin wants to make Punky Brewster a Prep Cook. The admin selects “Brewster, Punky 10024” from the employee list, “Prep Cook” from the Employee Job list, and “Add Employee Job” from the option list. The admin then presses submit.



The user will receive the following screen.



After looking over the changes, the user can press submit. A confirmation screen will appear. If the admin edits the record, only the active field can be changed. Below is an example of an Employee Job edit.



Schedule

The Schedule menu contains two submenus:

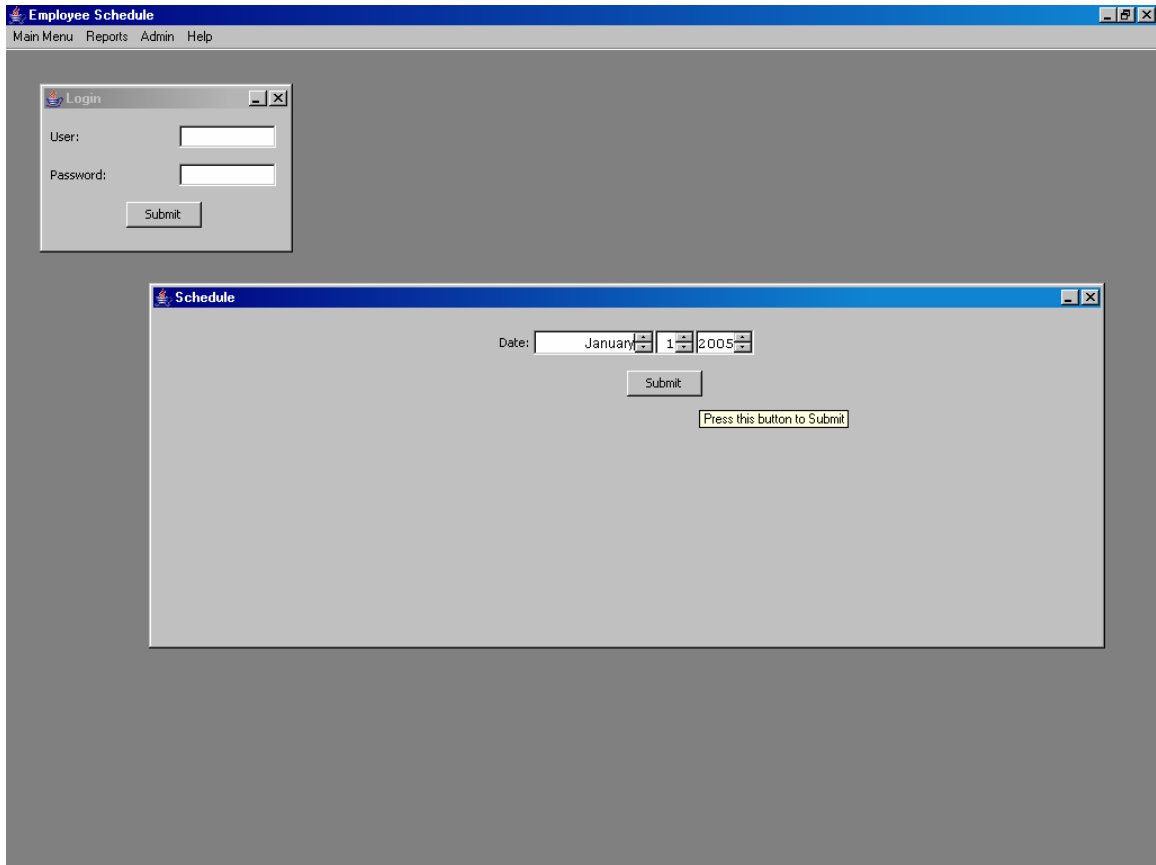
- Schedule: View and Edit Schedule for a particular day.
- Vacation: View and Edit Vacation for a particular day.

Schedule

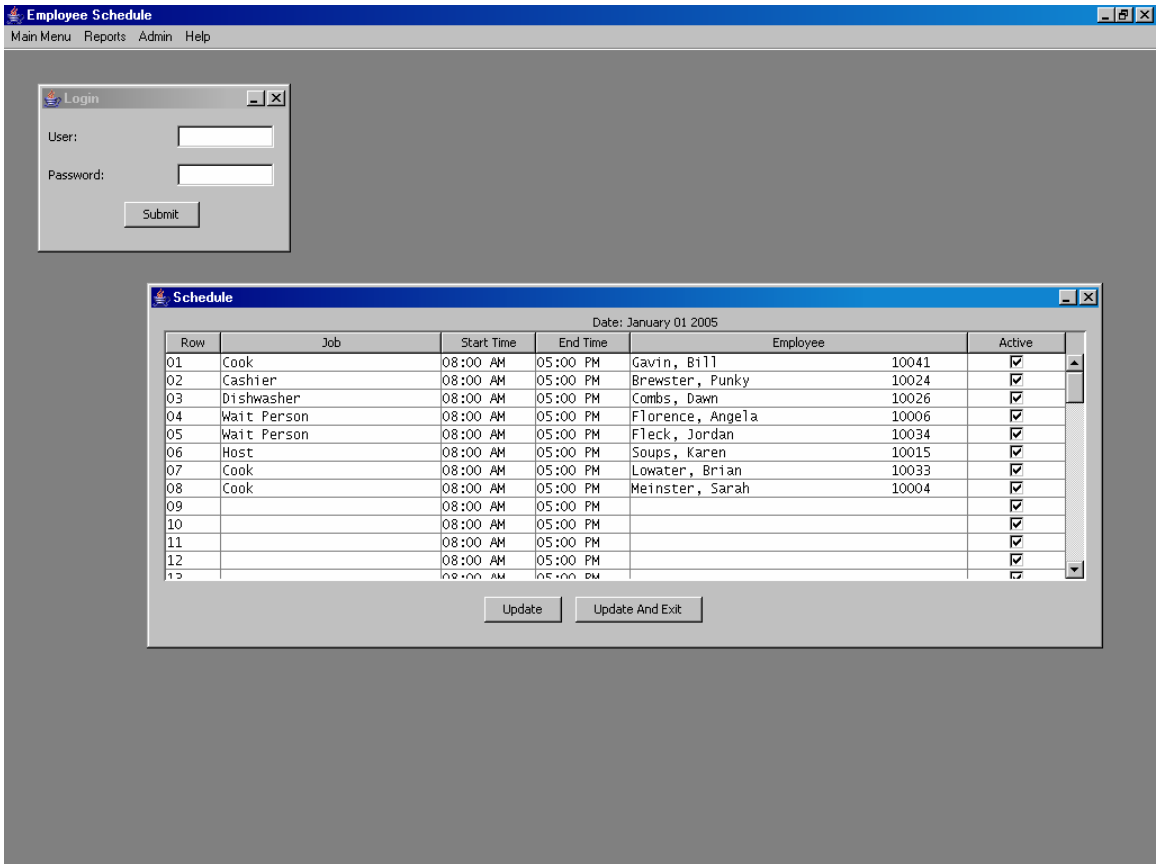
The admin uses the schedule window for creating the employee schedule for a particular day. In this view, the admin is allowed to see all the employees scheduled for work, the time they begin and end working, and the jobs they will be performing. Employee Schedule allows an employee to be scheduled only once per day. A maximum of 75 employees can be scheduled for a particular day. An employee who has a vacation record for that particular day can not be scheduled for work. Also an employee must be able to perform the scheduled job. There are 75 rows in the schedule view to accommodate the maximum of 75 employees. Each row consists of several columns:

- Row: The row number. (Can not be edited.)
- Job: The name of the job.
- Start Time: The starting time of the shift.
- End Time: The ending time of the shift.
- Employee: The employee name
- Active: Selected the row is shown in the employee and staff reports. Deselected the row is not shown in the employee and staff reports.

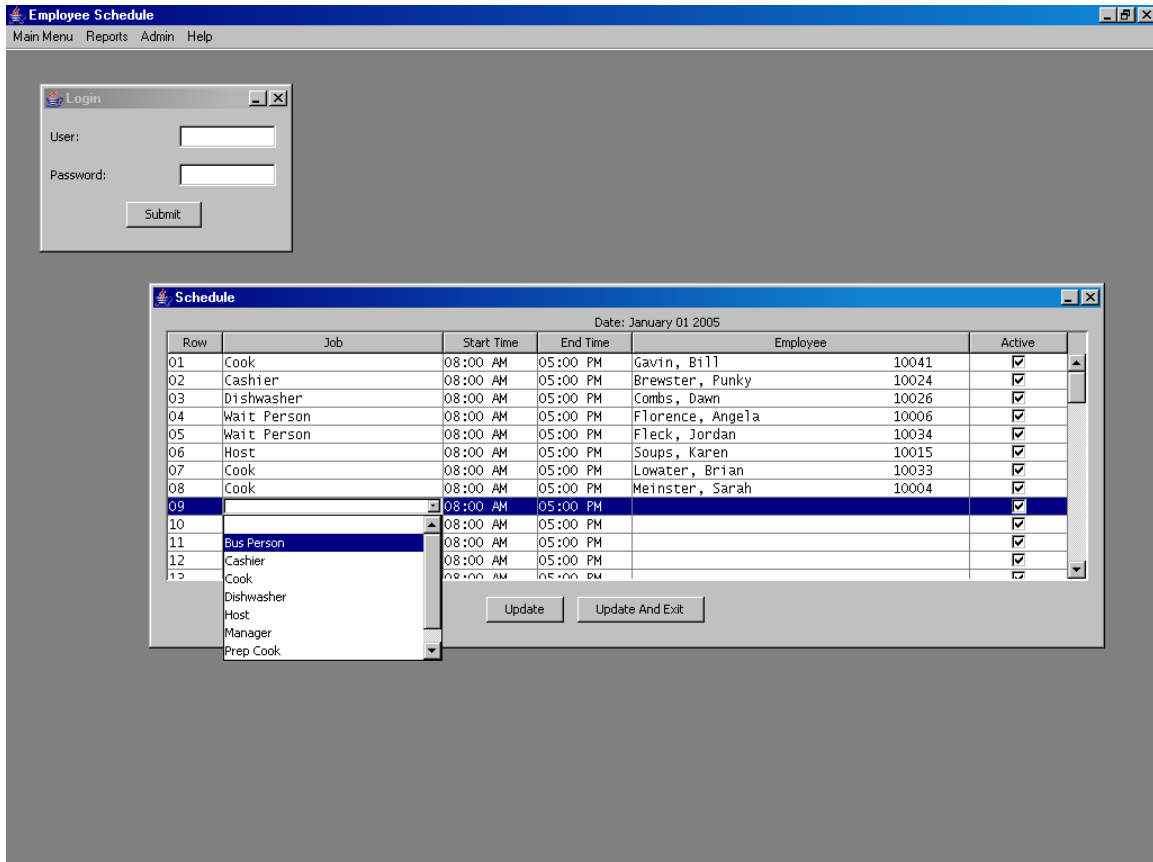
In the following example, the admin wants to view the schedule for January 1st 2005.



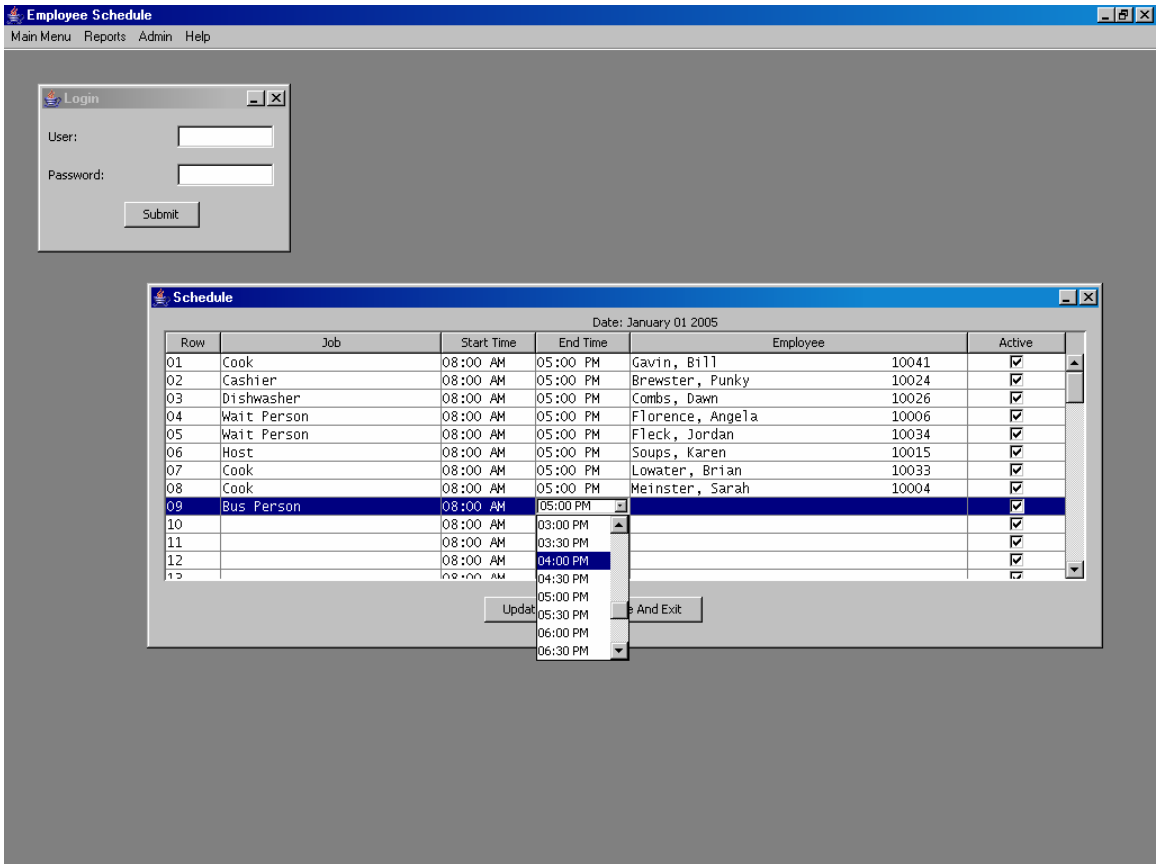
After pressing "Submit", the schedule appears.



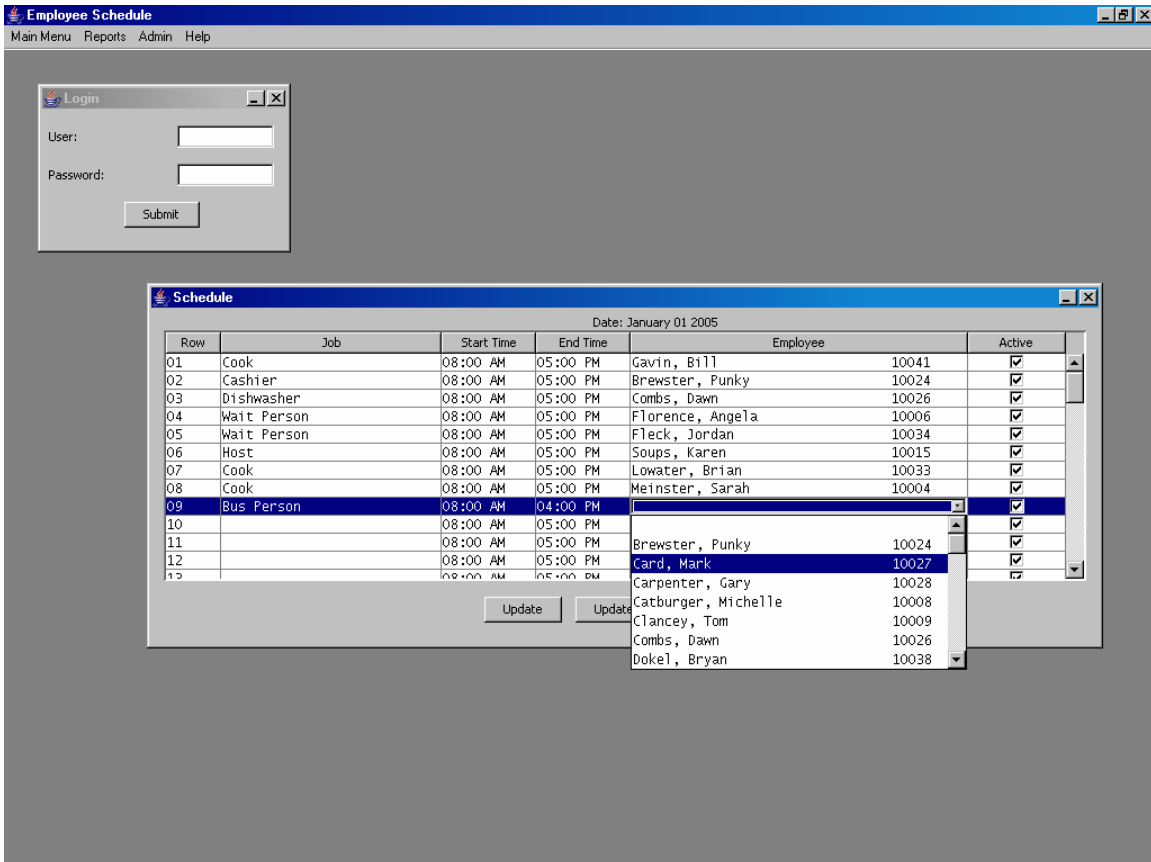
The admin wishes to add a Bus Person to the schedule. The admin goes to Row 9 and click on the Job column. The Job list will appear with all the active Jobs. The admin clicks on “Bus Person”.



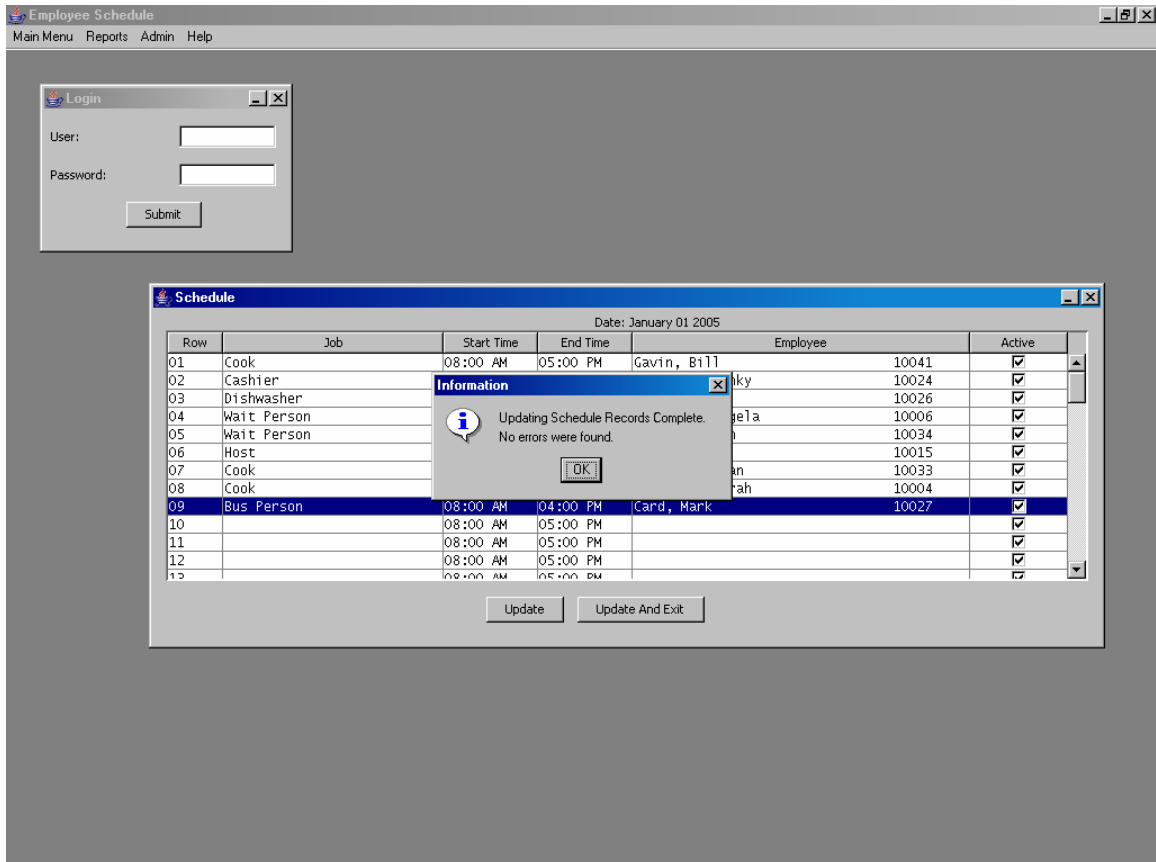
The admin changes the End Time by going to Row 9 and clicking on the End Time column. The admin selects and clicks 04:00 PM. To limit the choices, times is incremented in half hours.



After selecting the time, the admin selects “Card, Mark 10027” from the active employee list following similar steps to selecting the end time.

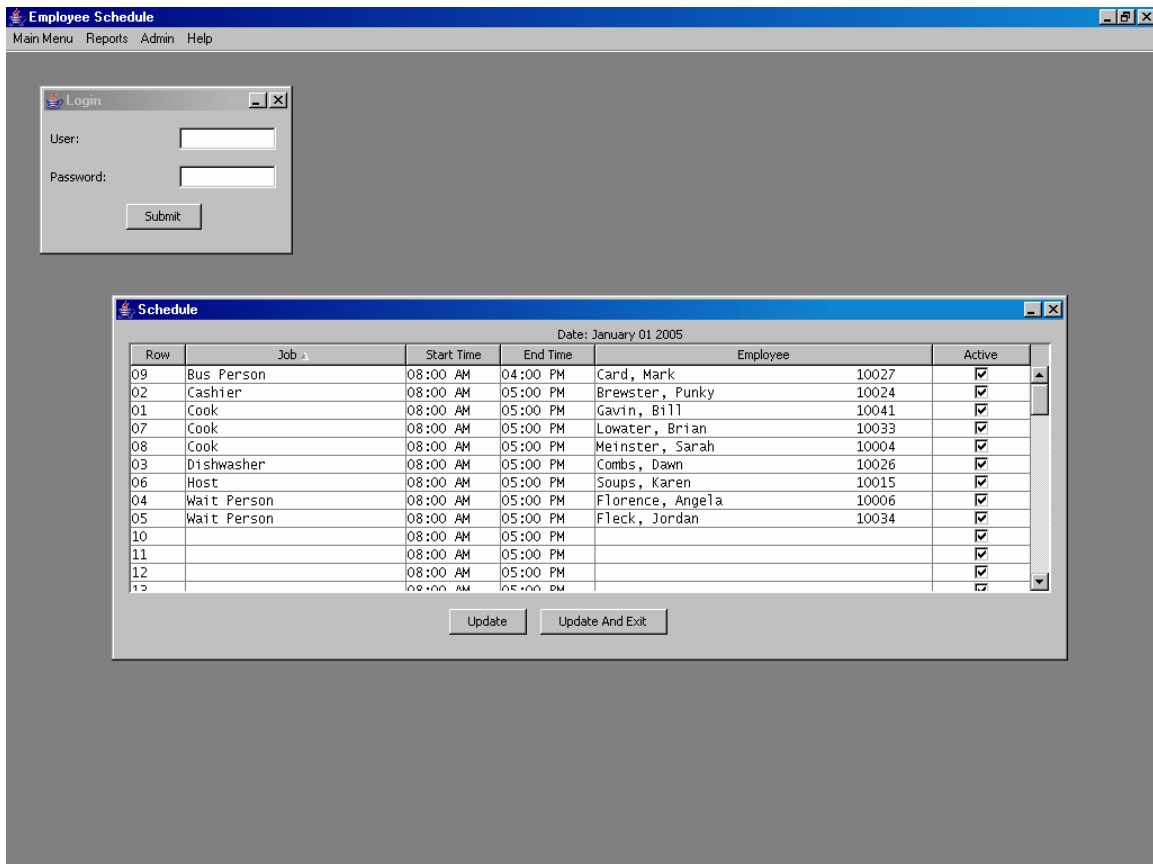


After making all changes, the admin presses “Update” to commit the changes to the database. *Note: To exit to the starting Schedule window press “Update and Exit”.* Since Mark Card is not on vacation and is able to be a Bus Person, there are no errors. Otherwise an error window would appear.

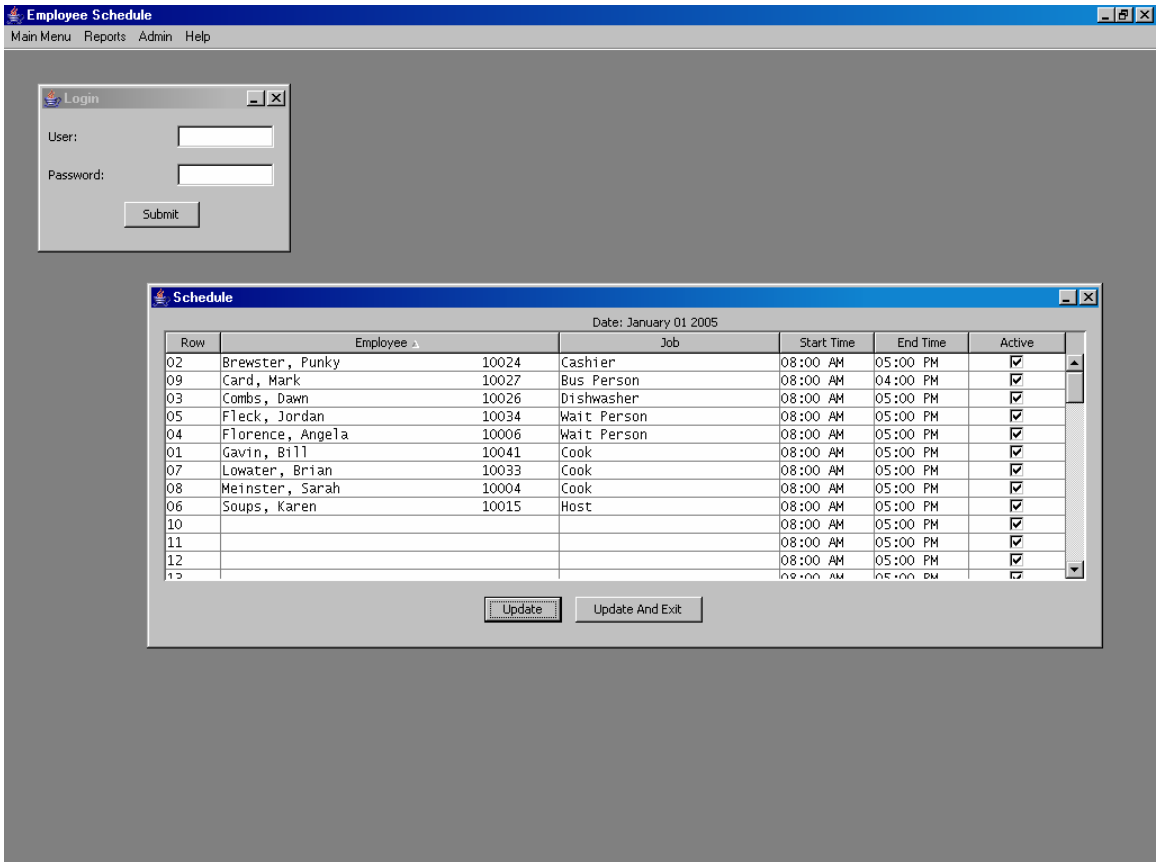


The Staff Report: “Print Staff Available” is useful when scheduling people. The admin could quickly find all the employees who are not scheduled for work or vacation on a particular day that are capable of being a “Bus Person”.

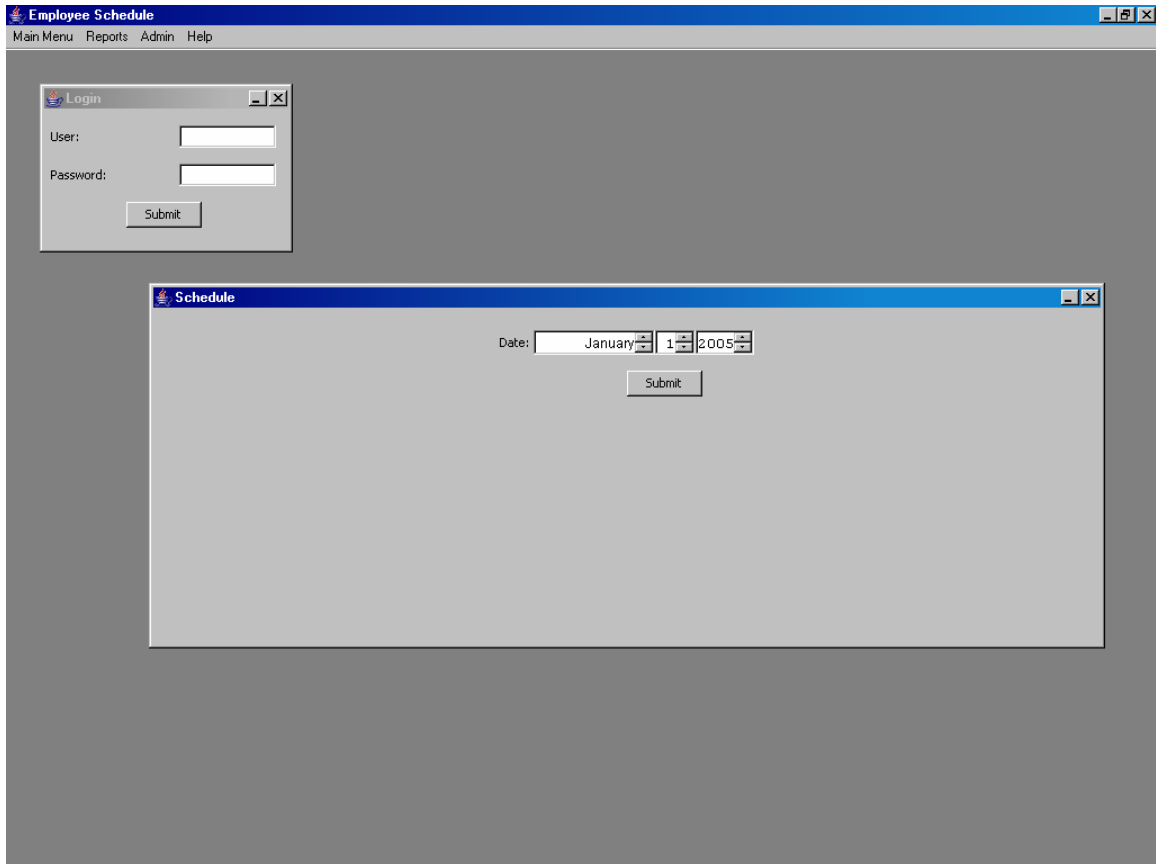
The Schedule view also allows sorting. For example, suppose the admin wants the job name in alphabetical order. The admin clicks “Job” and the job names will be sorted alphabetically. The entire line will move in accordance. To deselect, the admin can click “Job” again. It is always recommended that admin updates the schedule before sorting columns.



All the fields can be sorted alphabetically. However alphabetically sorting Start Time and End Time may not yield the desired results. In addition to sorting, the admin can also move columns by clicking and dragging. In this particular example, the admin moved the employee column in front of the job column and then proceeded to sort the employee names.



When the admin is done making changes, the “Update and Exit” button is clicked. After pressing the confirmation window, the original window is present.

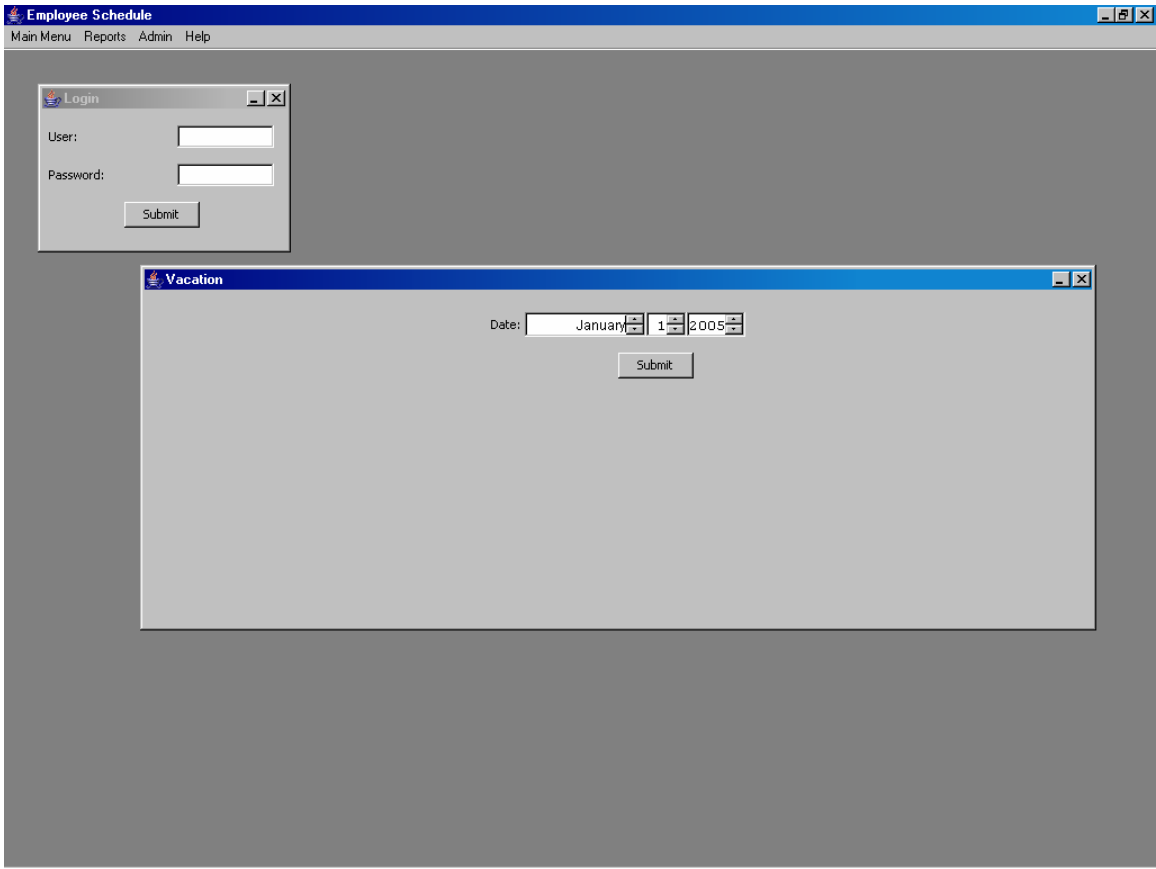


Vacation

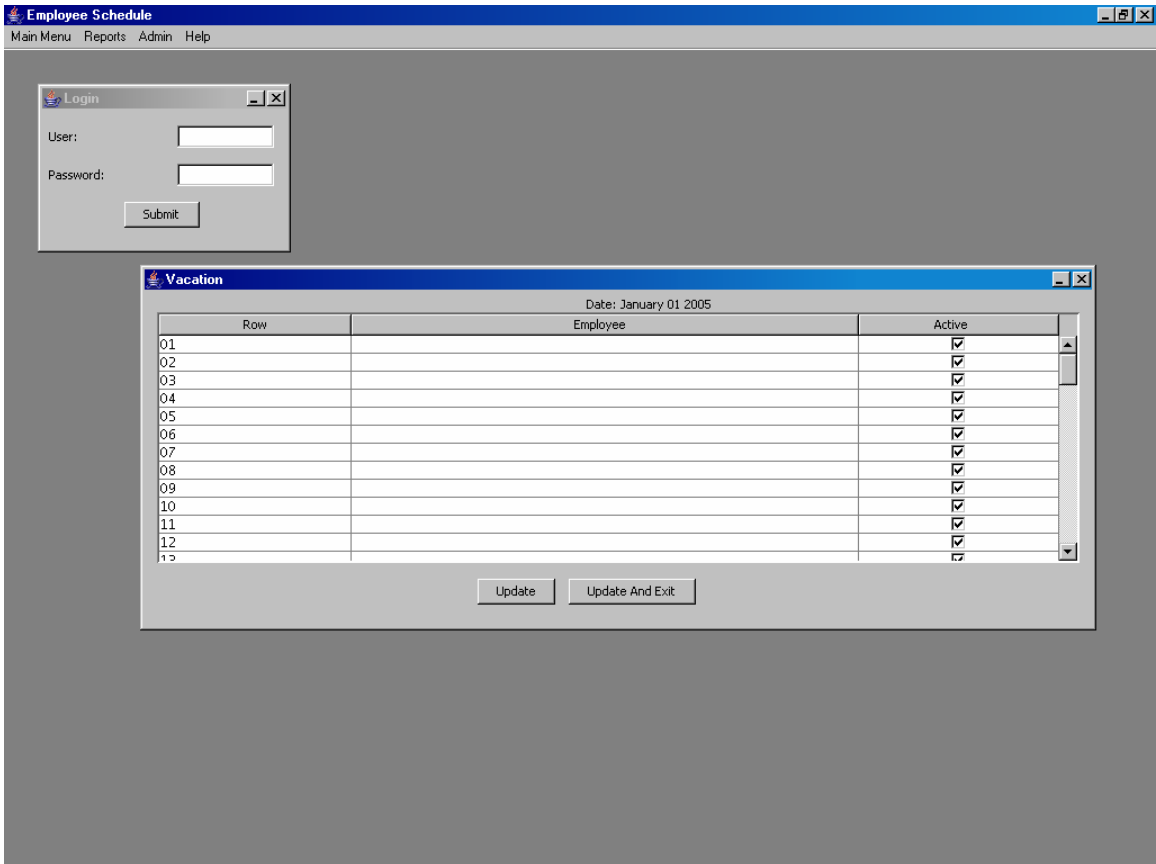
The admin uses the Vacation window for creating the employee vacation for a particular day. In this view, the admin is allowed to see all the employees scheduled for vacation. Employee Schedule allows an employee to be scheduled for vacation only once per day. A maximum of 75 employees can be scheduled for vacation on a particular day. An employee who has a schedule record for that particular day can not be scheduled for vacation. There are 75 rows in the Vacation window to accommodate the maximum of 75 employees. Each row consists of several columns:

- Row: The row number. (Can not be edited.)
- Employee: The employee name
- Active: Selected the employee in the row can not be scheduled for work. Deselected the employee in the row can be scheduled for work.

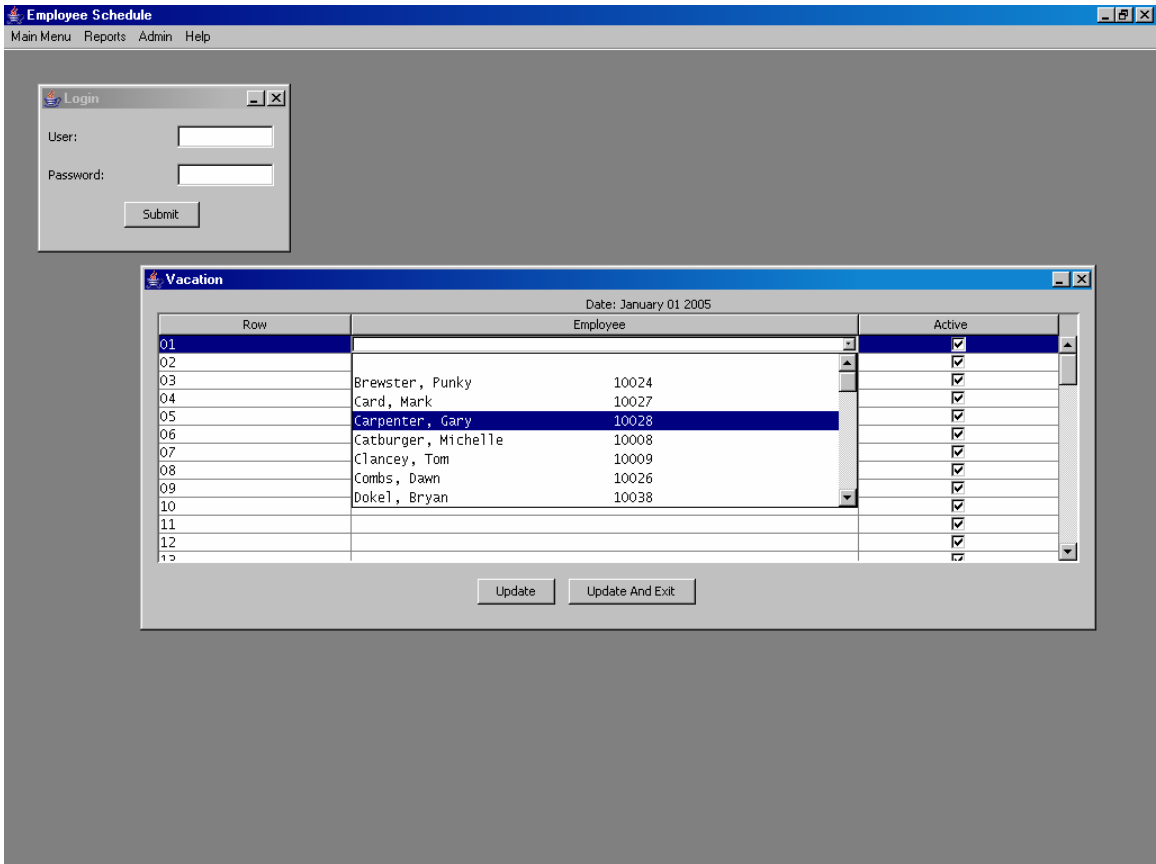
In the following example, the admin wants to view the vacation for January 1st 2005.



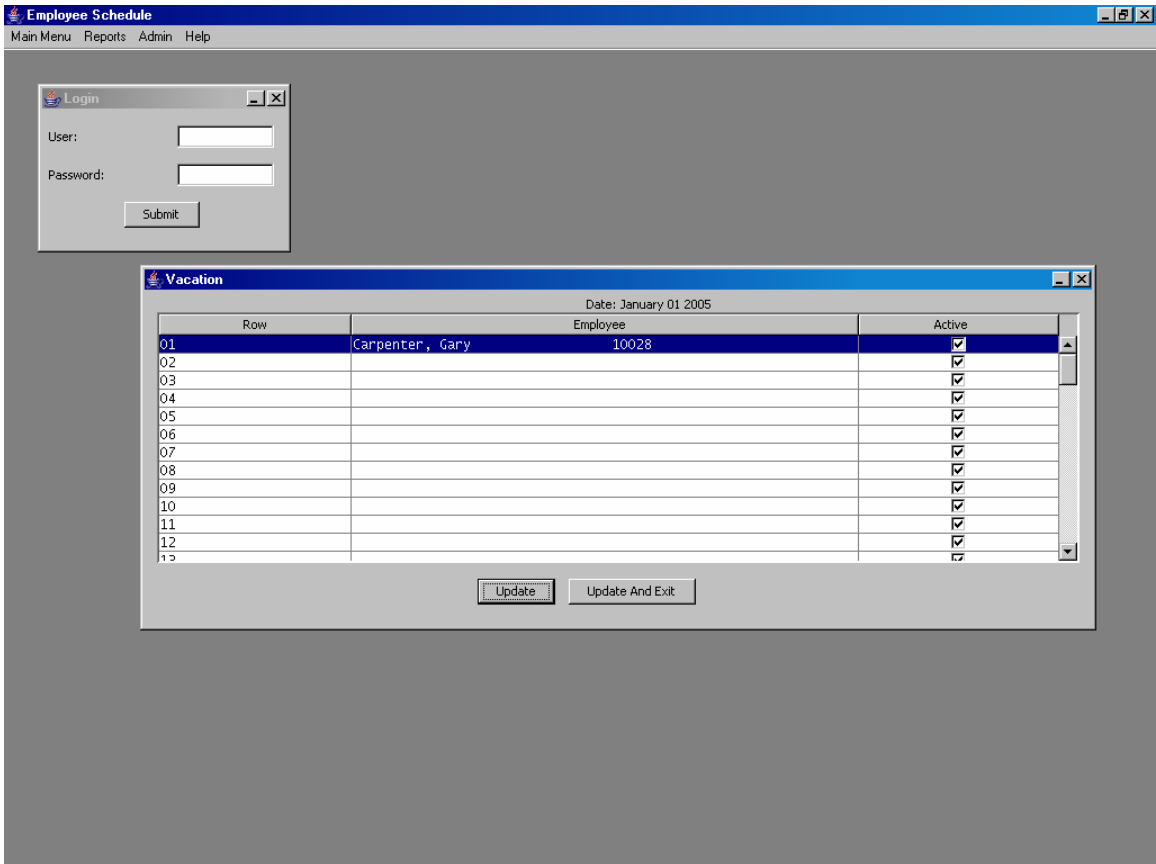
After pressing submit, the admin receives the following window.



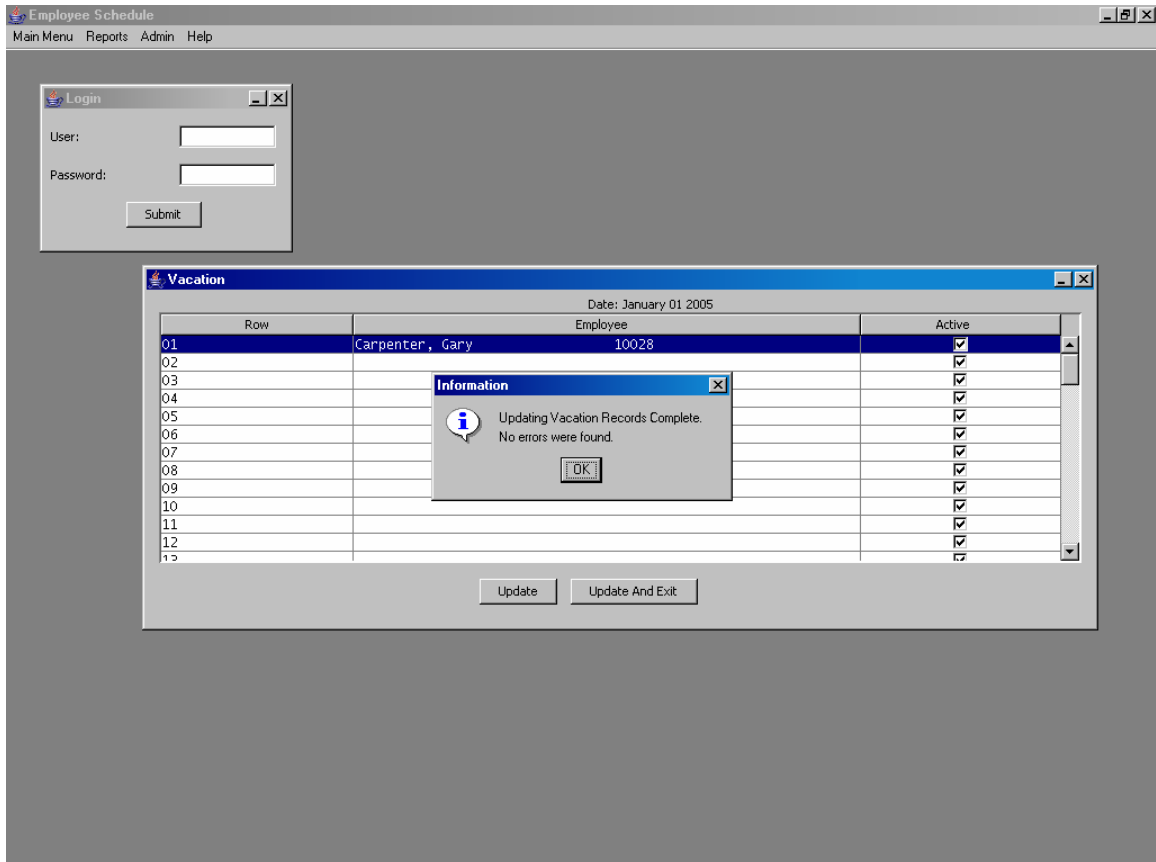
The admin adds "Carpenter Gary 10028" by going to Row 01 and clicking on the Employee column to bring up the employee list. Then the admin selects and clicks on "Carpenter Gary 10028".



The admin must press “Update” to commit the changes to the database. If there are any conflicts, an error window will appear.



After pressing submit, the admin will receive the following message window: “Updating Vacation Records Complete. No errors were found.”



The admin can sort and rearrange the columns in the Vacation window in the same way as the Schedule window. It is always recommended that admin updates the vacation before sorting columns.

Help

The help menu contains the following submenus:

- Help: Basic Help information for the Employee Schedule program
- Test Database Connection: Test to make sure that the database connection is working properly
- About: Information concerning the version and author of the Employee Schedule program.