



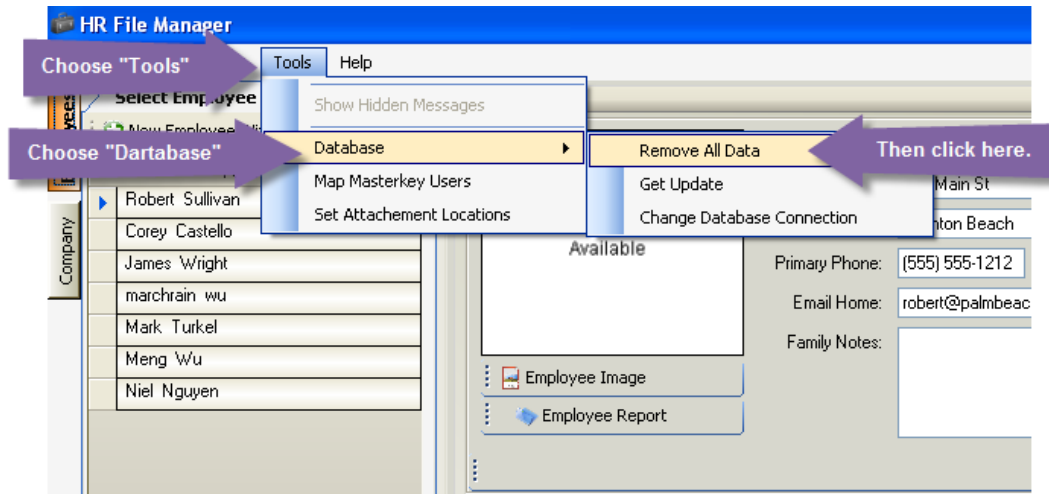
Guide to Getting Started:

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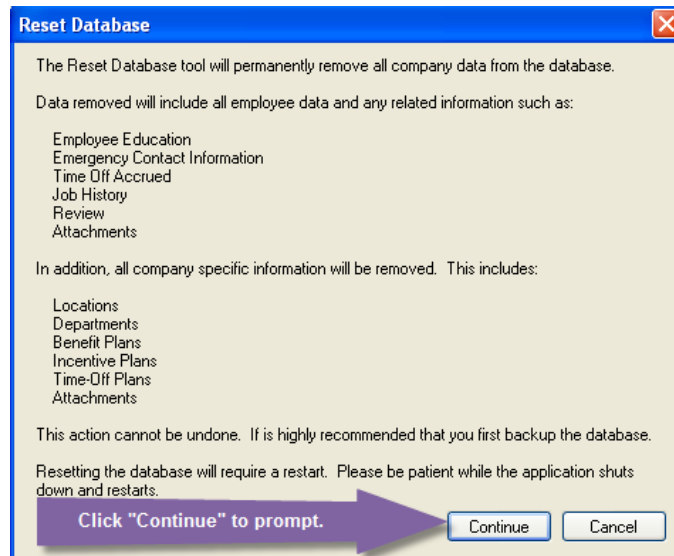
1.0 Removing the Dummy Data

Upon initial install of EFM, default dummy data will exist. You may play around with and modify this data to get a feel for the EFM. Ultimately, when you are ready to begin entering your company-specific information, you will need to remove the dummy data. This can be accomplished by doing the following:

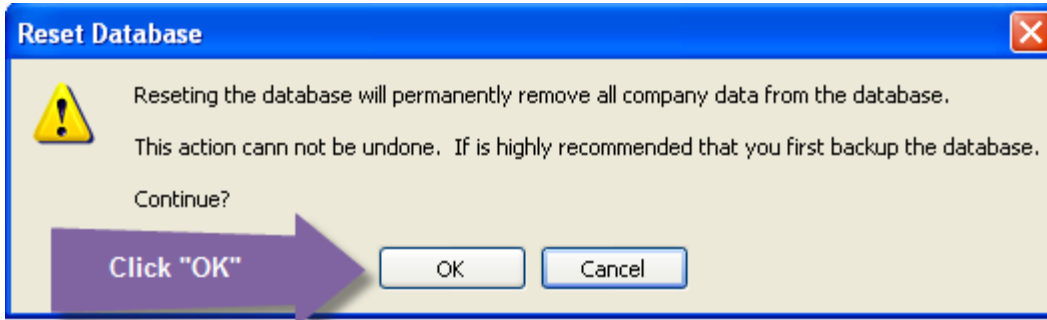
1. From the menu, access Tools -> Database - Remove all Data.



2. Select 'Continue' at the prompt.



3. Select 'OK' at the next prompt.



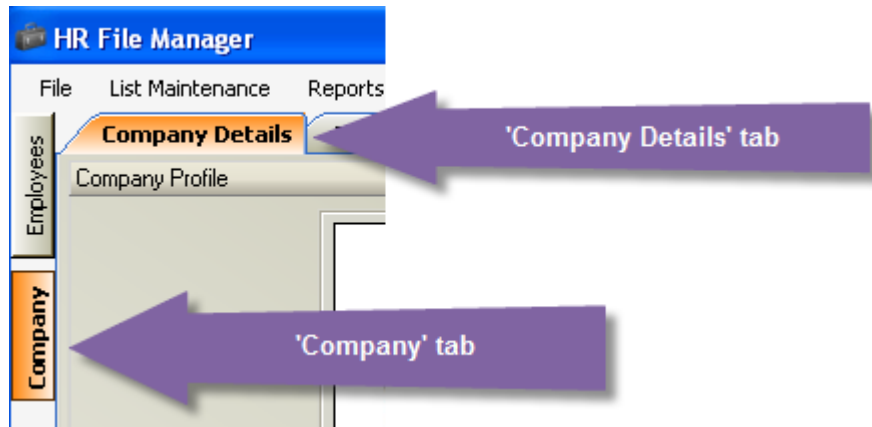
4. The default data should now be removed.

The image shows a form titled "Employee Profile". On the left is a placeholder for an employee image, labeled "Image Not Available". Below this are two buttons: "Employee Image" and "Employee Report". To the right of the image placeholder are several input fields: "First:", "MI:", "Last:", "Address:", "City:", "State:" (with a dropdown arrow), "Unit:", "Zip:", "Primary Phone:" (with a format mask), "Cell:" (with a format mask), "Work:" (with a format mask), "Ext:", "Email Home:", "Email Work:", "Family Notes:" (with a text area), and "Hobby Notes:" (with a text area). At the bottom right of the form is an "Undo" button with a green arrow icon.

Note: This is noted in the prompts, but for future reference, it is best to back up your database before removing data. For the purposes of removing the initial dummy data, however, the backup should not be necessary.

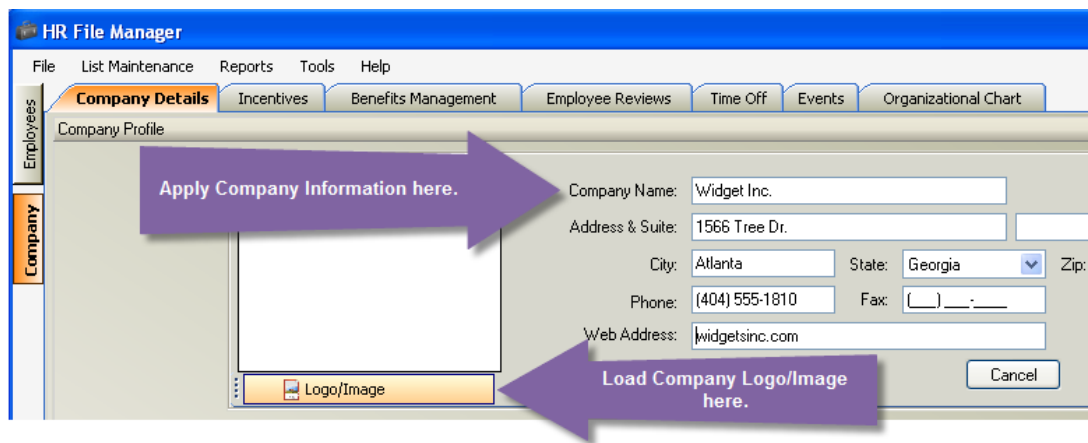
2.0 Setting up your Company Details

Now that the default data has been removed, you will want to begin by adding your company information. You can access the Company section of the EFM by selecting the **'Company'** tab on the left side of the program. Once inside the Company section, select the **'Company Details'** tab, which is the first tab from the left in the upper navigation bar.



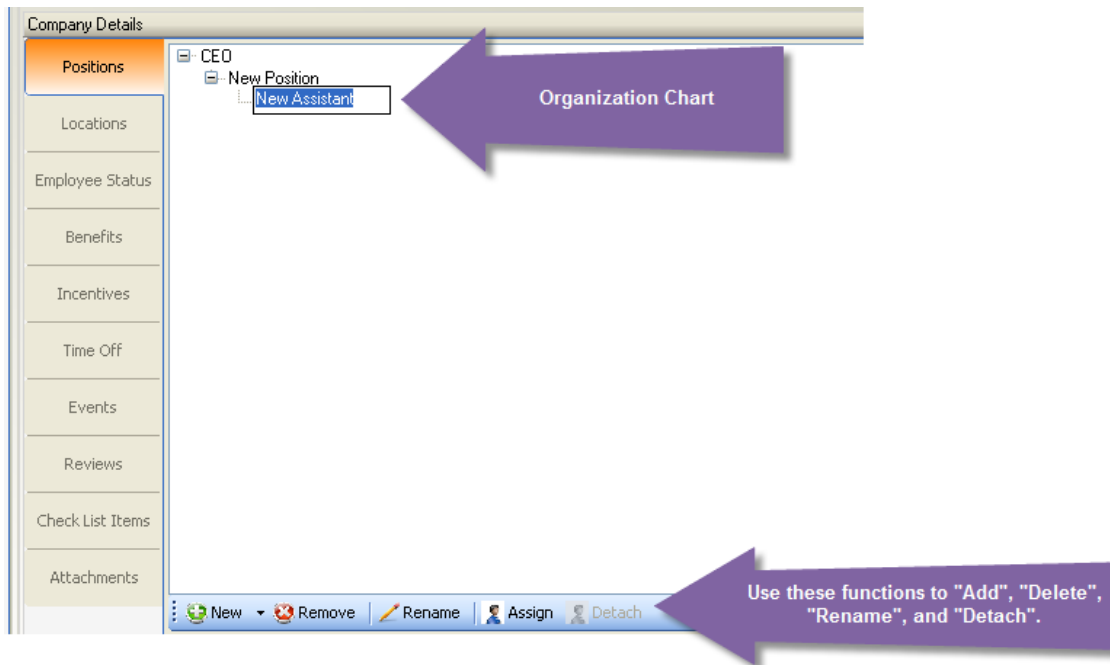
2.1 – Company Profile

Begin by adding your Company's general information in the Company Profile at the top of the page. You may also click the **'Logo/Image'** button to upload an image from your computer.



2.2 - Positions

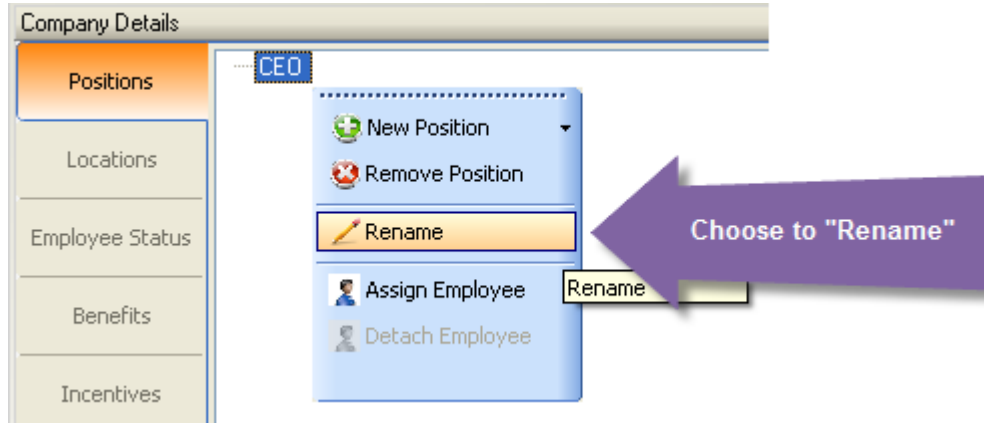
The Positions tab is the first of the tabs on the left side of the screen. Setting up Positions will allow you to prepare an Organization Chart and to assign employees to open positions. From the Positions area, you may add new positions within your company's hierarchy, remove or rename existing positions, assign positions to existing employees, and detach employees from existing positions.



Note: You may create new positions at a later time and then assign those positions to existing or new employees.

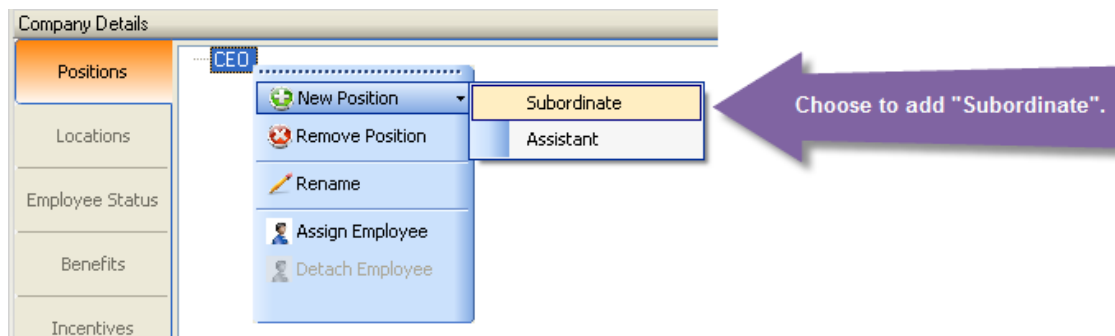
2.2.1 Creating and Using the Organization Chart

Upon initial setup, there will be only one position at the top of the hierarchy. By default, this is the CEO position. However, you may right click on 'CEO' and select 'Rename' from the lower menu or right click and select 'Rename' from the drop-down.

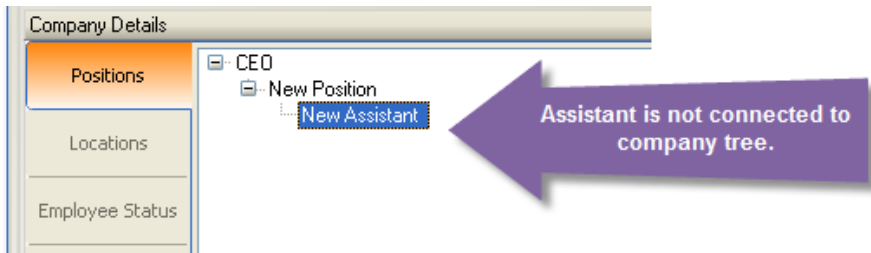


While at the top position, you will want to add relevant subordinate or assistant positions.

Subordinate positions will be those that report to the employee level above them and generally fit directly into the company's hierarchy. That means that as the functional areas are identified in the Organization Chart, a Subordinate position will be directly linked in the tree. A subordinate position may also have other subordinate employees below them.

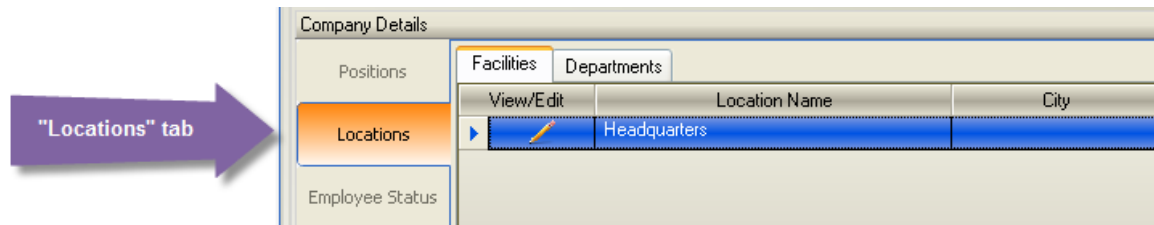


The **Assistant Position** will not fit directly into the company hierarchy, meaning that it will not have employees below it, nor will it appear in a view of the functional area of the company. They will simply report to the individual on the level above them in the hierarchy. Lastly, the assistant position is not directly connected to your company tree in the Organizational Chart.



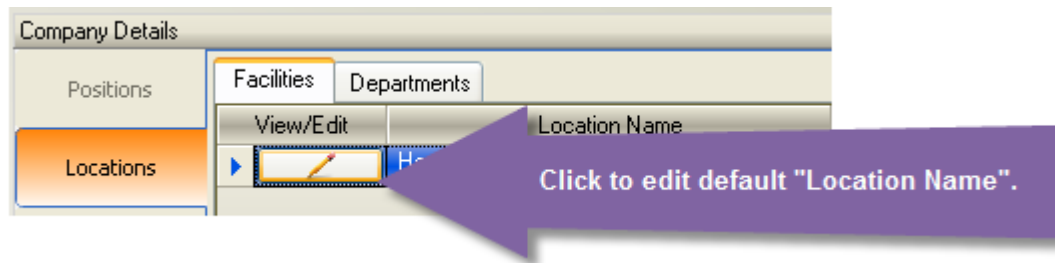
2.3 Locations Tab

Next, move to the Locations tab right below the Positions tab. Here you may add pertinent information on the physical location(s) of your company, areas within it, and also, the various departments.



2.3.1 Adding Facilities

The system will initially contain a default location referred to as 'Headquarters'. You may edit the default location, Headquarters, by clicking the edit button (**pencil icon**). Alternatively, you may remove this location by clicking the delete icon and proceed to add a new location via the '**Add New**' button at the bottom right of the screen.



Alternatively, you may remove a **“Location Name”** by clicking the delete icon and proceed to add a new location via the 'Add New' button at the bottom right of the screen.



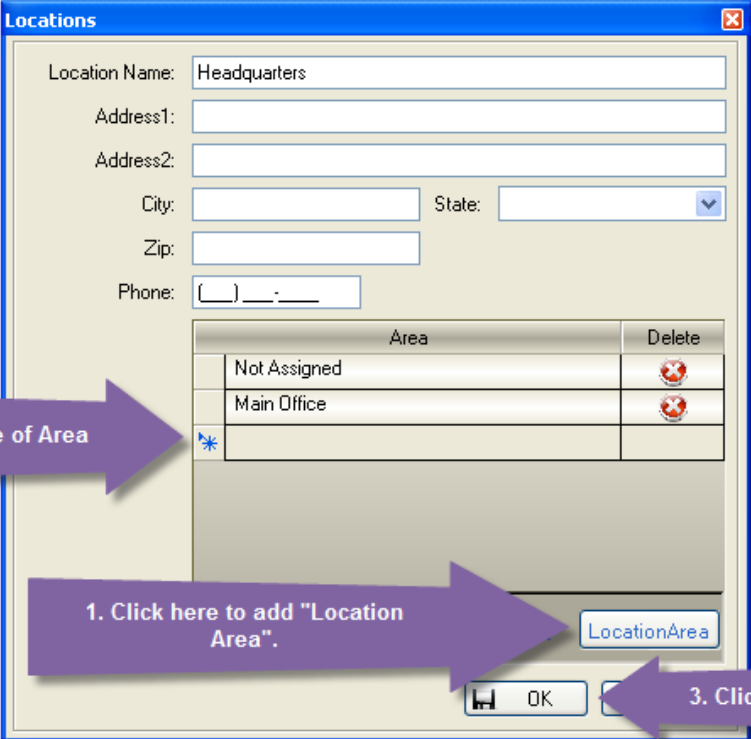
Update the details of the location, such as name, address, phone, etc.

2.3.2 Adding Areas

Additionally, you may also add areas that exist within this particular location. To do so, click the edit button (pencil icon) and then 'Location Areas' button, type the name of the area, and press the enter key to save the name.

Once you have added the relevant information regarding this location and any areas within it, click the 'OK' button to save this location.

Repeat this process as needed for any additional locations that need to be added.



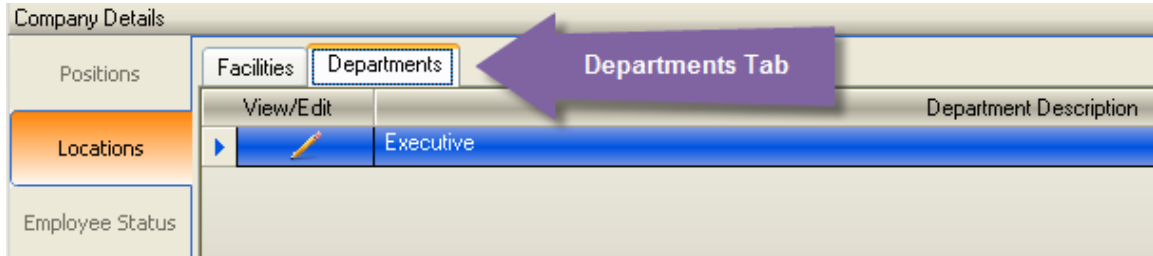
The screenshot shows a 'Locations' dialog box with the following fields: Location Name (Headquarters), Address1, Address2, City, State (dropdown), Zip, and Phone. Below these fields is a table with columns 'Area' and 'Delete'. The table contains two rows: 'Not Assigned' and 'Main Office', each with a delete icon. A third row is highlighted with a blue asterisk. A purple arrow labeled '2. Type name of Area' points to this row. Below the table is a 'LocationArea' button. A purple arrow labeled '1. Click here to add "Location Area"' points to this button. At the bottom of the dialog are 'OK' and 'Cancel' buttons. A purple arrow labeled '3. Click "OK"' points to the 'OK' button.

Area	Delete
Not Assigned	
Main Office	
*	

2.3.3 Adding Departments

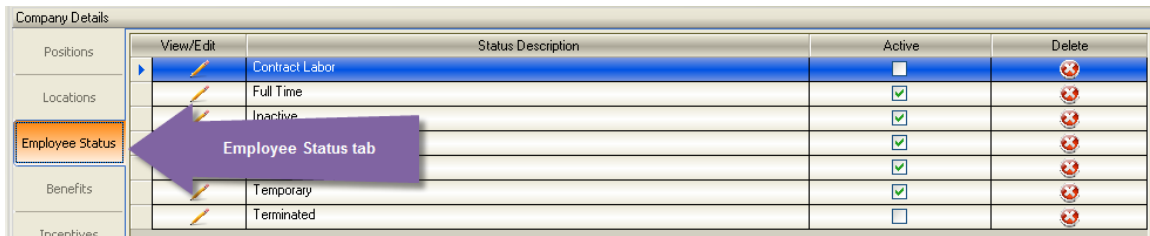
You may also access the **'Departments'** tab, which is to the right of the Facilities tab.

Here, you may add the Departments that exist within your company. By default, there is an Executive department. This can be removed or renamed as needed.



2.4 Employee Status

Next, navigate to the Employee Status tab. Here, you may add or remove employee statuses as needed.



View/Edit	Status Description	Active	Delete
	Contract Labor	<input type="checkbox"/>	
	Full Time	<input checked="" type="checkbox"/>	
	Inactive	<input checked="" type="checkbox"/>	
		<input checked="" type="checkbox"/>	
	Temporary	<input checked="" type="checkbox"/>	
	Terminated	<input type="checkbox"/>	

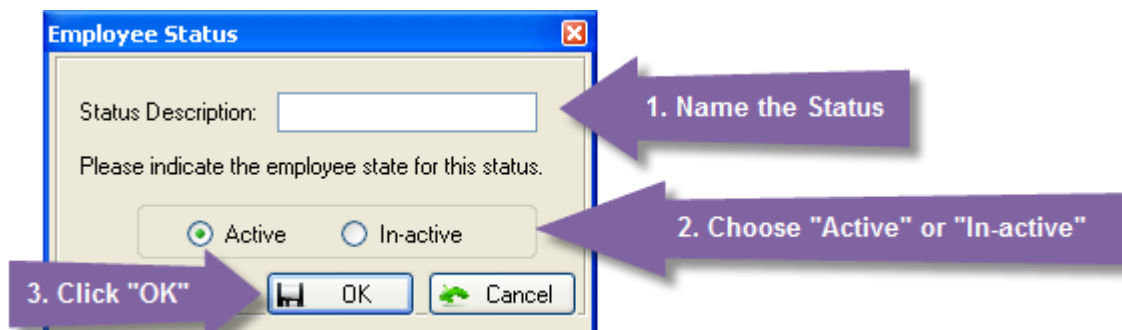
2.4.1 Adding a New Status

Add a new status by clicking the 'Add New' button at the bottom right of the screen.



Give the status a name and choose whether the employee state for the status is active or inactive.

You may also edit any existing status by clicking the edit button next to the status name. When editing a status, you may rename it and/or modify the employee state (indicating whether this status code applies to Active or Inactive employees).



Employee Status

Status Description:

Please indicate the employee state for this status.

Active In-active

1. Name the Status

2. Choose "Active" or "In-active"

3. Click "OK"

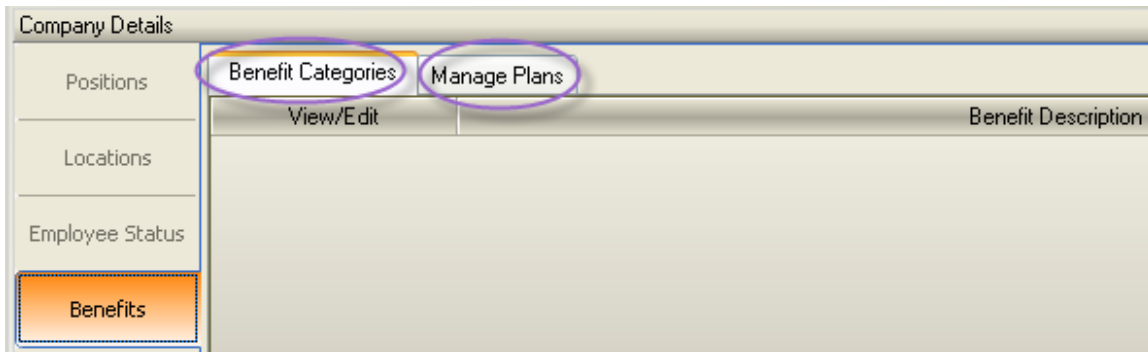
-The status will then appear.

View/Edit	Status Description
	Contract Labor
	Example
	Full Time

← Status will appear

2.5 Benefits

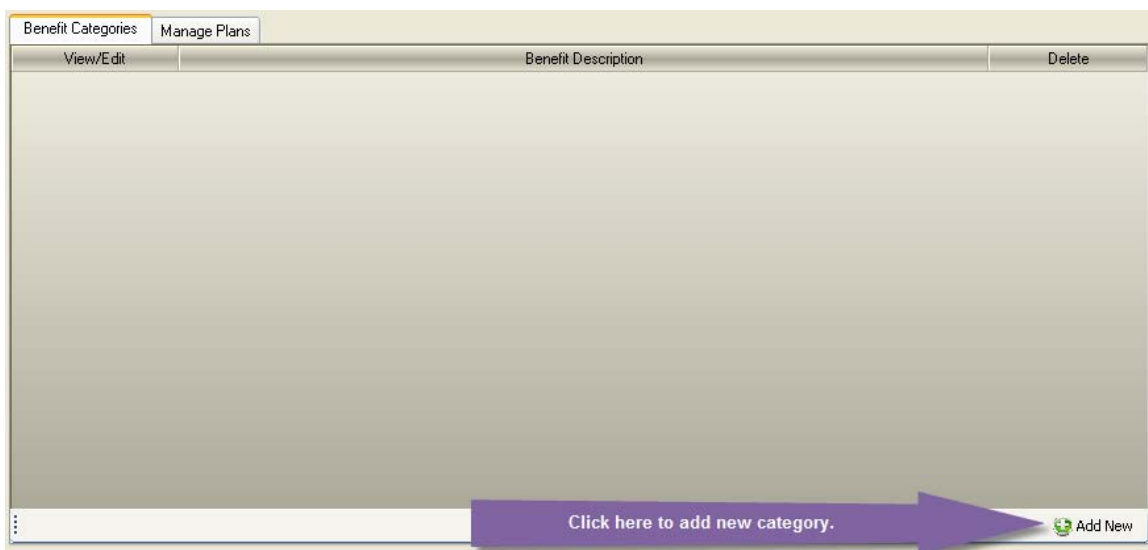
Next, navigate to the Benefits tab. Here, you will notice two sub-tabs: Manage Plans and Benefit Categories.



2.5.1 Benefit Categories

First, access the Benefit Categories tab. Here, you specify the various categories of benefits, such as medical, dental, etc.

To add a new category, click the '**Add New**' button at the bottom right of the screen.



2.5.2 Managing Plans

Once you have added all of the necessary benefit categories, access the Manage Plans sub-tab. Here you will create specific benefit plans that exist within your benefit categories. You can have multiple plans for a given category.

-To begin, select the 'Add New' button at the bottom right of the screen. The “**Benefit Plan**” window will pop-up.

-Here you will provide the plan with a name, a benefit category, a funding type (shared, company, employee), eligibility requirements (such as age range and/or days on the job), any relevant notes about the plan, and lastly, EEO category requirements.

-Once you have entered all of the relevant details on the plan, click the 'OK' button to save it.

The screenshot shows the 'Benefit Plan' window with the following fields and sections:

- Plan Name:** Text input field.
- Benefit Category:** Text input field.
- Funding Type:** Dropdown menu.
- Eligibility Requirements:**
 - Age Range:** Text input field (0) and **To:** text input field (0).
 - Days On Job:** Text input field (0).
- Notes:** Text area.
- EEO Category Requirements:** List of categories with checkboxes:
 - Executive/Senior Level Officials a...
 - First/Mid Level Officials and Mana...
 - Professionals
 - Technicians
 - Sales Workers
 - Administrative Support Workers
 - Craft Workers
- Buttons:** OK and Cancel.

Annotations with arrows point to:

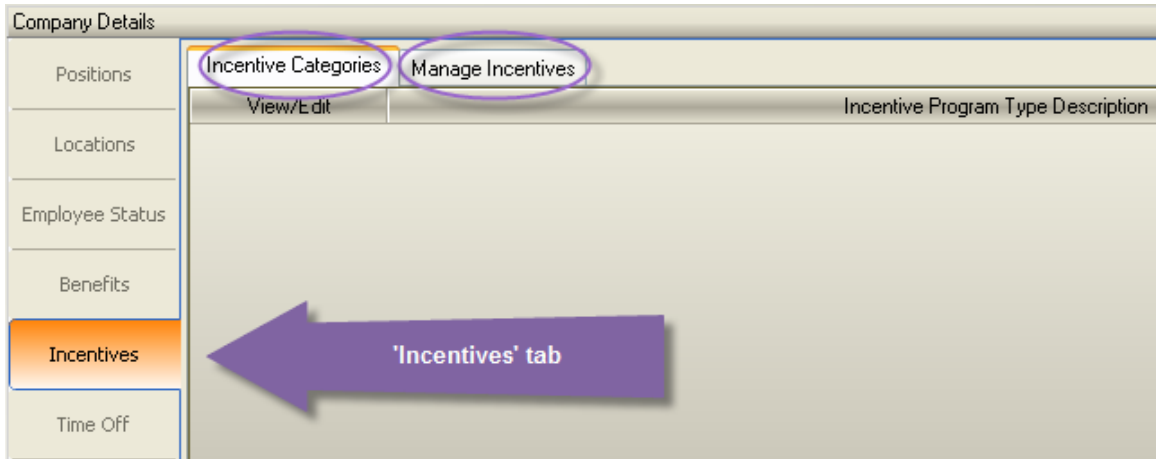
- Fill out information:** Points to the Plan Name and Funding Type fields.
- Choose 'Benefit Category':** Points to the Benefit Category field.
- Choose a 'EEO Category Requirements':** Points to the EEO Category Requirements list.
- And click 'OK' to save:** Points to the OK button.

At a later time, you may modify the details of the plan by clicking the edit button or delete the plan using the ‘**delete button**’.



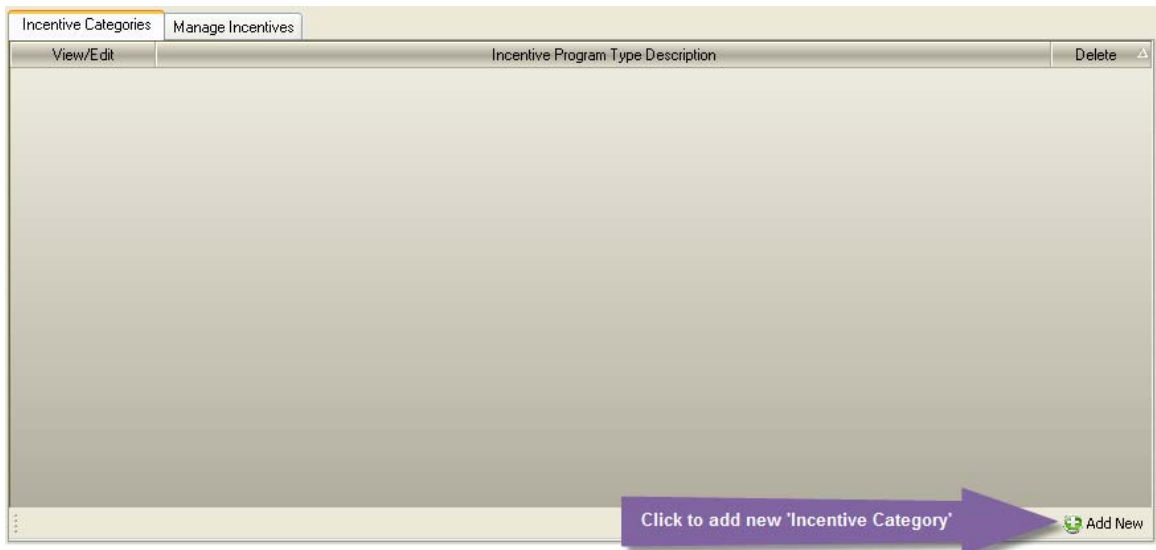
2.6 Incentives

Next, navigate to the Incentives tab. Here, you will notice two sub-tabs: '**Incentive Categories**' and '**Manage Incentives**'.



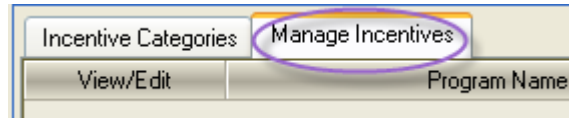
2.6.1 Incentive Categories

First, navigate to the Incentive Categories tab and click '**Add New**' in the bottom right corner to begin adding categories for your various incentives.

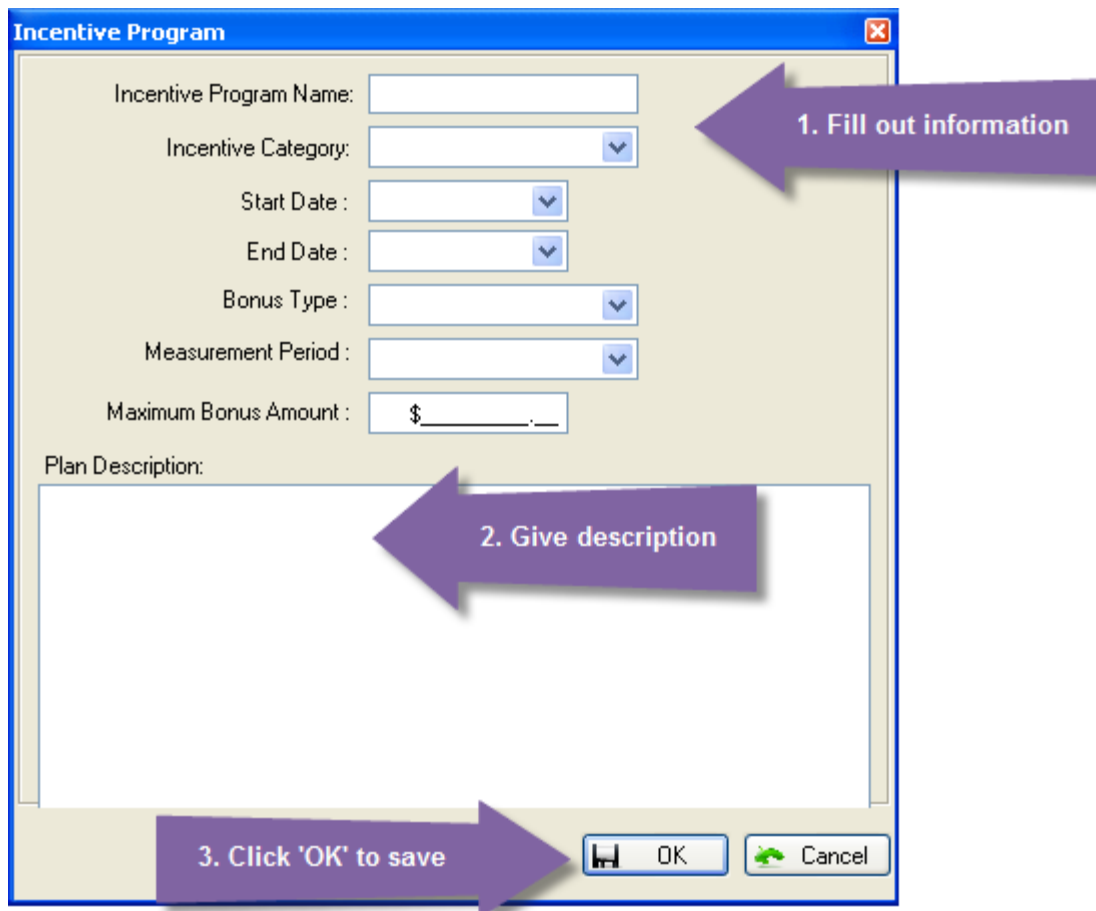


2.6.2 Managing Incentives

Once you have entered the desired categories, navigate to the Manage Incentives tab and click 'Add New' to add a new incentive program.

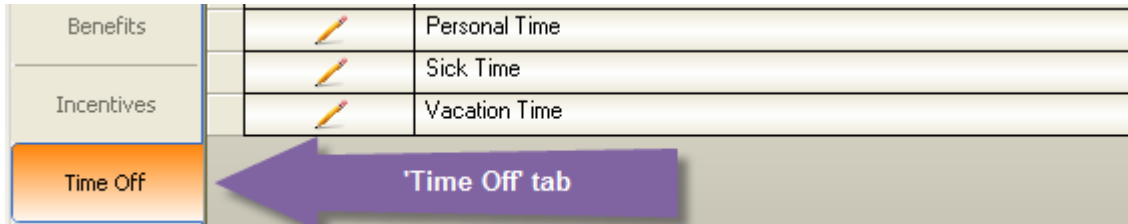


In the popup, give the incentive program a name, select the incentive type, which will be one of the categories you just entered, specify the start date and end date for the program, select the bonus type, measurement period, and enter the maximum bonus amount. You can also enter any details on the plan in the text area at the bottom.

A screenshot of a dialog box titled 'Incentive Program'. It contains several input fields and a text area. Three purple arrows with white text point to specific parts of the form: '1. Fill out information' points to the top section of fields; '2. Give description' points to the 'Plan Description' text area; and '3. Click 'OK' to save' points to the 'OK' button at the bottom right. The fields include: 'Incentive Program Name' (text box), 'Incentive Category' (dropdown), 'Start Date' (dropdown), 'End Date' (dropdown), 'Bonus Type' (dropdown), 'Measurement Period' (dropdown), and 'Maximum Bonus Amount' (text box with a dollar sign). The 'Plan Description' is a large text area. At the bottom right are 'OK' and 'Cancel' buttons.

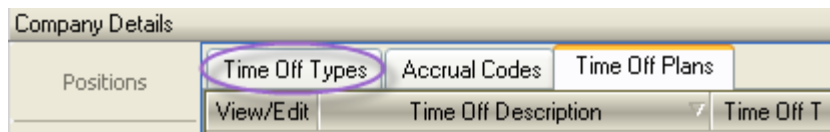
2.7 Time Off

Next, navigate to the Time Off tab. Here, there are three sub-tabs: Time Off Types, Accrual Codes, and Time Off Plans.

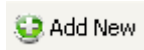


2.7.1 Time Off Types

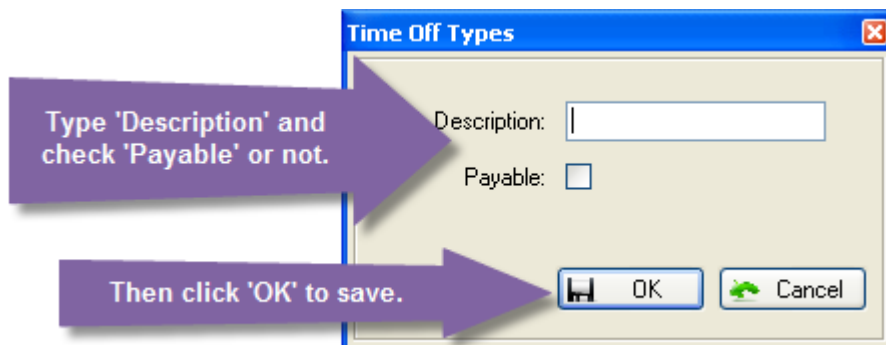
Start at the Time 'Off Types' sub-tab. You will notice several default time off types. You may remove or modify these as needed.



To add a new time off type, click the 'Add New' button at the bottom of the screen.

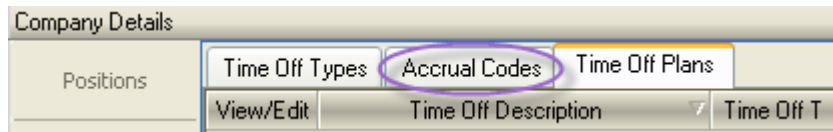


In the popup window, enter a description and select whether or not this time off type is payable (will employees be compensated for time off in this category?). Lastly, click 'OK' to save. Add additional time off types as needed.

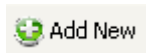


2.7.2 Accrual Codes

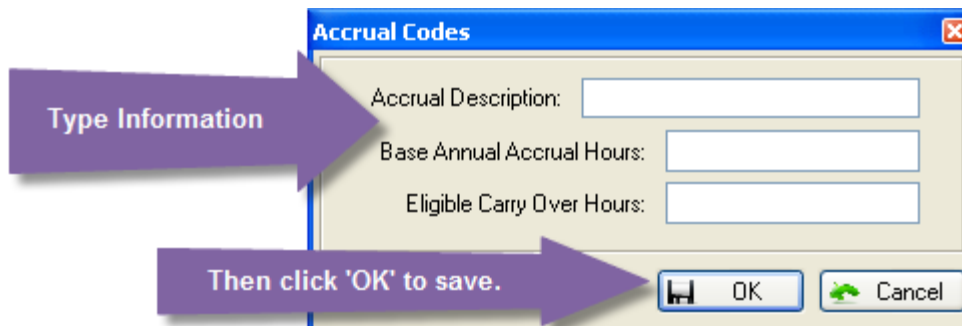
Next, navigate to the Accrual Codes sub-tab. You will notice a few defaults already entered. Remove or modify these as you see fit.



Click the '**Add New**' button at the bottom to begin adding a new accrual code.

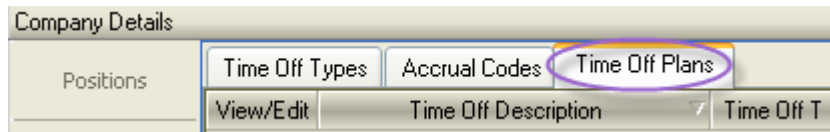


Enter a description for the accrual code, the base annual accrual hours, and the eligible carry over hours. Click '**OK**' to save, and repeat as needed.

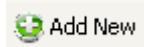


2.7.3 Time Off Plans

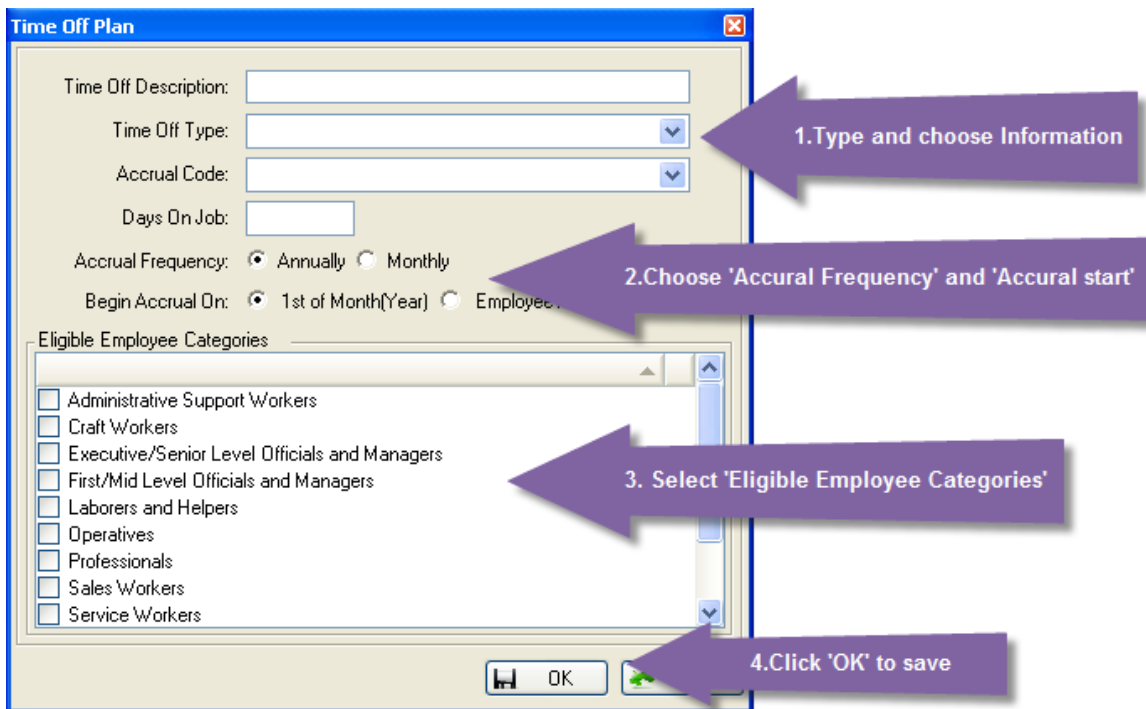
Once you have entered all of your desired time off types and accrual codes, navigate to the 'Time Off Plans' sub-tab.



Click 'Add New' at the bottom.



In the popup, enter a description for your plan, select the relevant time off type, select the relevant accrual code, enter the number of days on the job required for eligibility, select an annual or monthly accrual frequency, select when the accrual will begin, and lastly, select which employee categories are eligible for the plan.

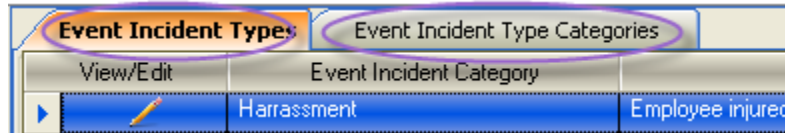


Note: You can add or remove Eligible Employee Categories by accessing the menu option 'List Maintenance'. From here, select EEO Categories. Here, you may delete existing categories or add new categories. Now, when creating a new time off plan, you will have the option to choose any new categories that you added.

Enter as many 'Time off Plans' as needed. Once you are satisfied, move on to the Events tab.

2.8 Events

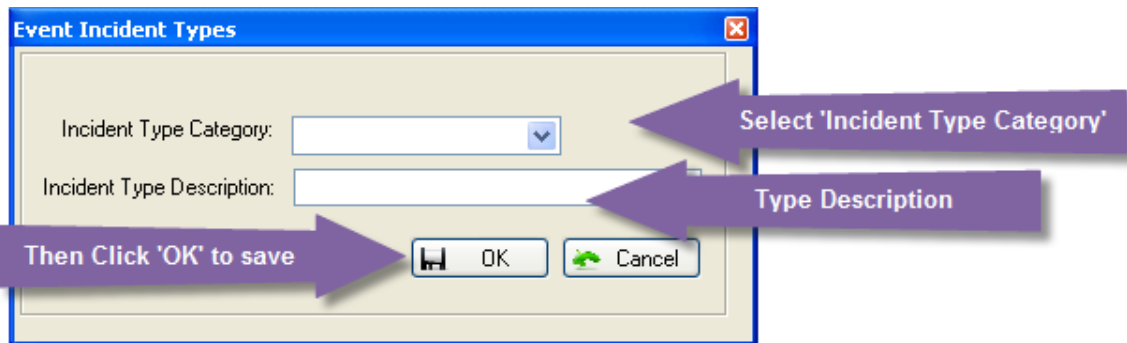
At the 'Events' tab, there are two sub-tabs: **Event Incident Types** and **Event Incident Type Categories**.



2.8.1 Event Incident Type

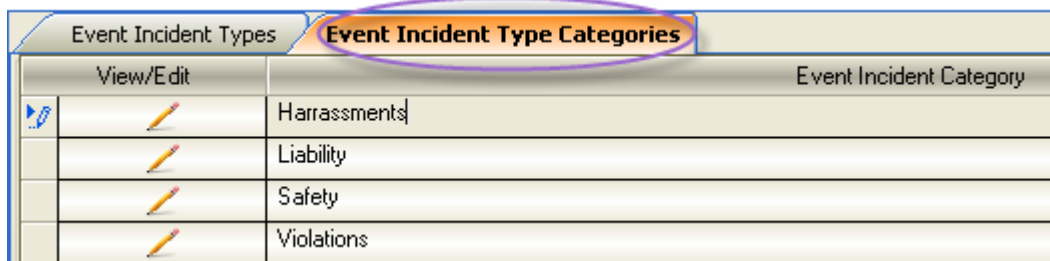
First, navigate to the 'Event Incident Type Categories' tab. You will notice several default categories. Remove or modify these as you see fit.

Click the 'Add New' button to add a new category. Provide a description for the category and click 'OK' to save.



2.8.2 Event Incident Type Categories

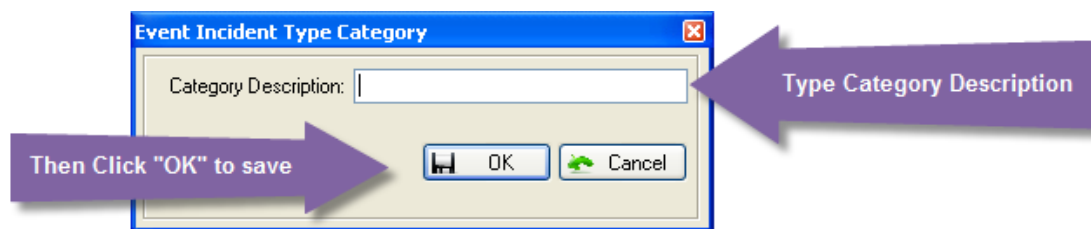
Once you have the desired categories, move to the “**Event Incident Types**” tab. There are many defaults here as well that may be modified or removed.



View/Edit	Event Incident Category
	Harrassments
	Liability
	Safety
	Violations

-To add a new incident type, click the '**Add New**' button. Select the relevant incident category and provide description for your new incident type. Click '**OK**' to save.

-Navigate to the Reviews tab when you are done here.



Event Incident Type Category

Category Description:

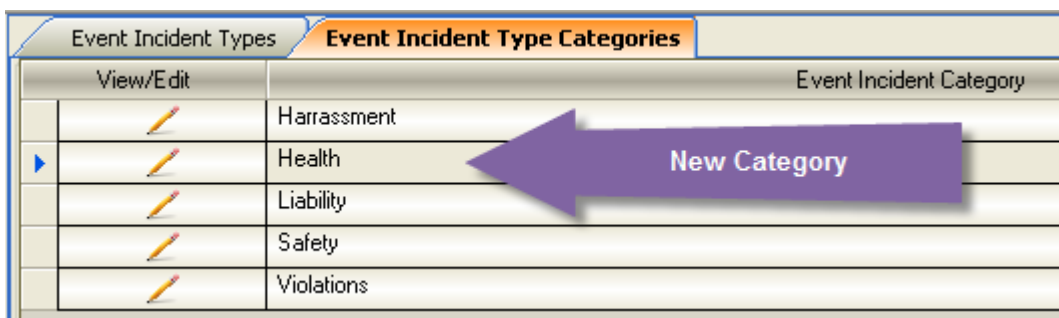
Then Click "OK" to save

OK Cancel

Type Category Description

-The new Category will then appear.

-Navigate to the Reviews tab when you are done here.



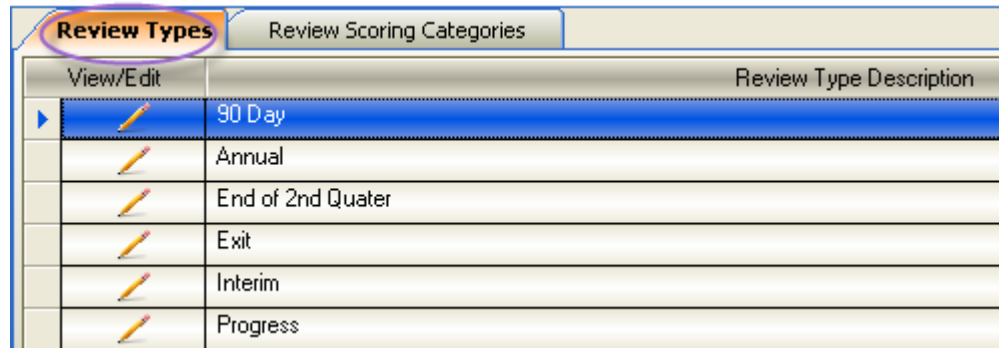
View/Edit	Event Incident Category
	Harrassment
	Health
	Liability
	Safety
	Violations








New Category

2.9 Reviews

2.9.1 Review Types

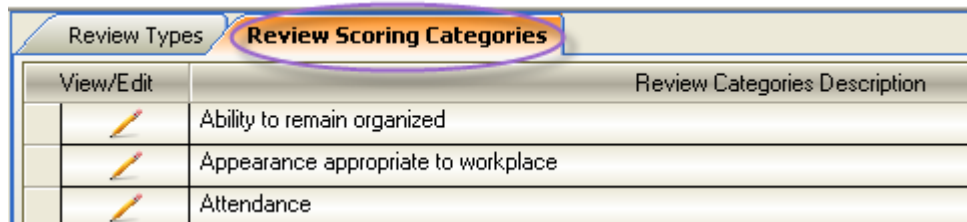
-In the Reviews area, access the Review Types sub-tab. Here, there are several default review types. Click the 'Add New' button at the bottom of the screen to add any additional review types.






Review Types		Review Scoring Categories
View/Edit		Review Type Description
		90 Day
		Annual
		End of 2nd Quarter
		Exit
		Interim
		Progress

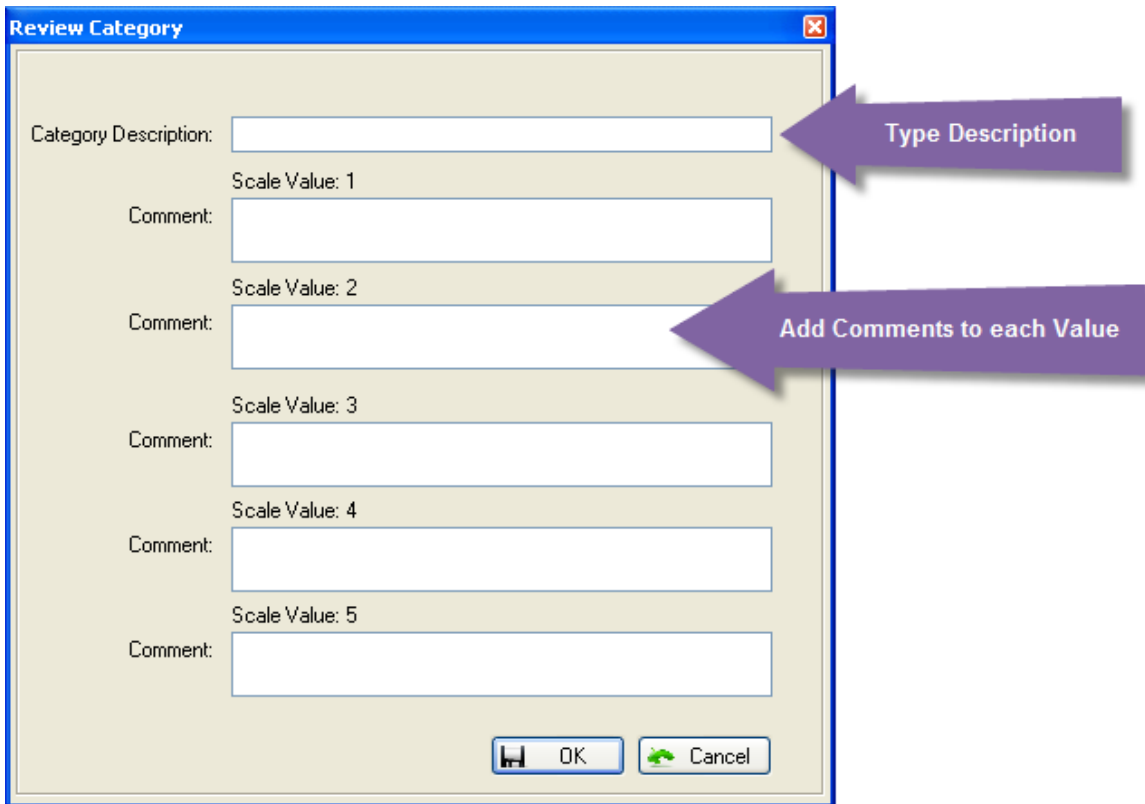
2.9.2 Review Scoring Categories

-Next, access the 'Review Scoring Categories' sub-tab. You will notice many pre-existing categories. Feel free to remove or edit these as needed.



Review Types		Review Scoring Categories
View/Edit		Review Categories Description
		Ability to remain organized
		Appearance appropriate to workplace
		Attendance

-You may also add new categories by clicking the '**Add New**' button. When adding a new category, provide a description and comments for each scale value, where 1 is the lowest rating and 5 is the highest.



The image shows a software dialog box titled "Review Category" with a close button in the top right corner. The dialog contains the following fields:

- Category Description: [Text Input Field]
- Scale Value: 1
Comment: [Text Input Field]
- Scale Value: 2
Comment: [Text Input Field]
- Scale Value: 3
Comment: [Text Input Field]
- Scale Value: 4
Comment: [Text Input Field]
- Scale Value: 5
Comment: [Text Input Field]

At the bottom of the dialog are two buttons: "OK" and "Cancel".

Two purple arrows with white text point to the input fields:

- An arrow points to the "Category Description" field with the text "Type Description".
- An arrow points to the "Comment" field for "Scale Value: 2" with the text "Add Comments to each Value".

2.10 Check List Items

Within the Check List Items tab, you will see many default items. You may add additional items that you need for your hiring and termination processes.

View/Edit	Check List Item	Check List Type	
	Background Check	Hire	
	Education Test	Hire	
	Orientation Completed	Hire	
	References Checked	Hire	
	Skills test	Hire	
	Skills Test II	Hire	
	Turn in Car	Termination	
	Turned in Credit Cards	Termination	
	Turned in Keys	Termination	
	Turned in Laptop	Termination	

Click the '**Add New**' button at the bottom to add new items. Provide an item name and select whether this item pertains to the hiring or termination process. Click '**OK**' to save the item.

Check-List Items

Check List Item:

Check List Type: Hire

Click to save

OK Cancel

Type Check List Item and choose List Type.

2.11 Attachments

On this tab, you may attach any relevant company documents. Storing and accessing documents is an essential element of creating a paperless environment.

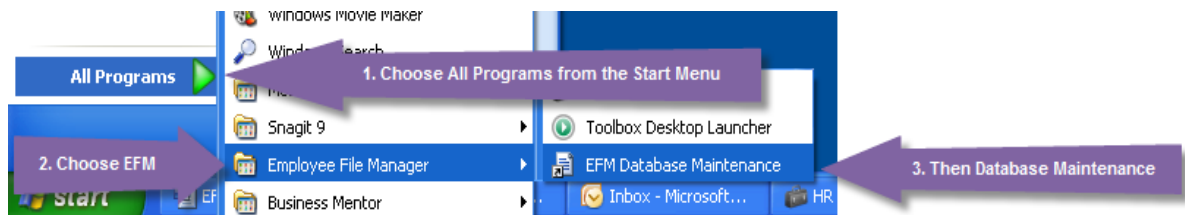
2.11.1 Getting Started

Before adding **Attachments** you must set a default program for opening files of a certain type, then the document will open. Example: Attaching an excel file and attempting to view the attachment on a PC without a program, such as Microsoft Excel, that is able to read excel documents. In this scenario, the file will not open.

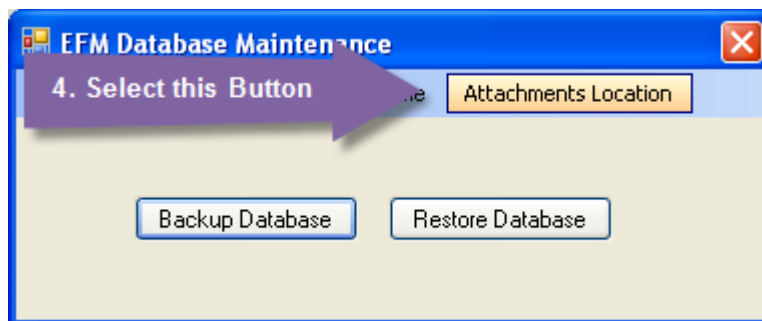
a. Setting a Default Location for a Basic Installation (Skip if you have a Multi-User Installation)

-Select the **'Start'** menu from the bottom of your computer screen.

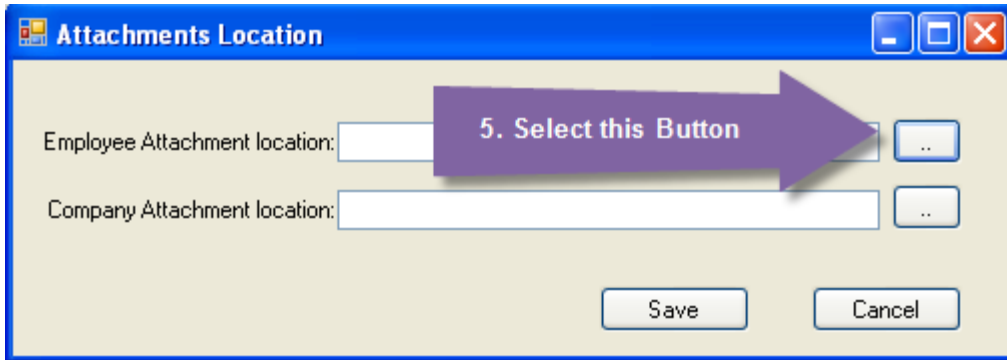
1. Select **'All Programs'**
2. Then Select **'Employee File Manger'**
3. Then **'Database Maintenance'**



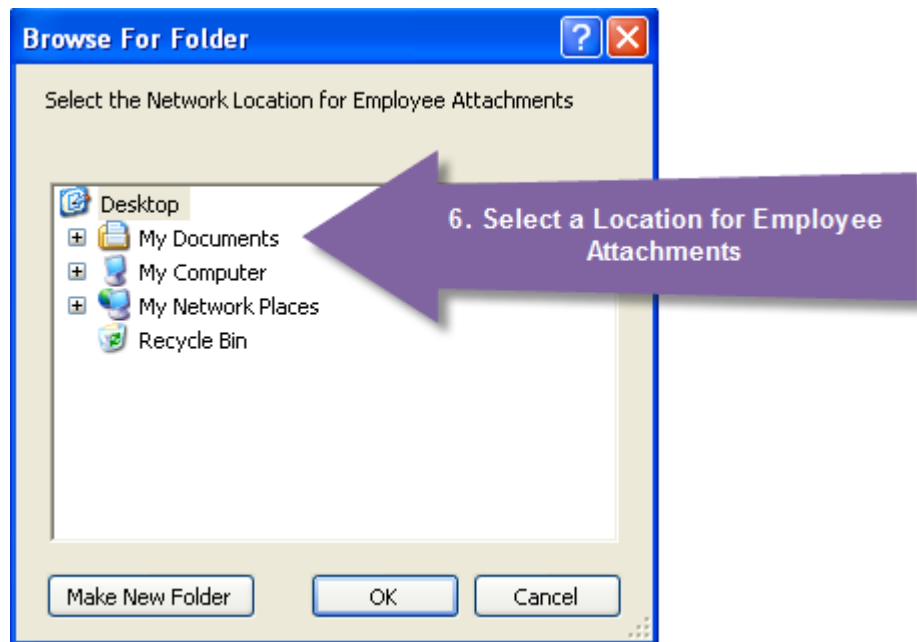
4. A window will then appear, select **'Attachments Location'**.



5. Select the button to the right of the text bar to choose your Employee Attachment Location.



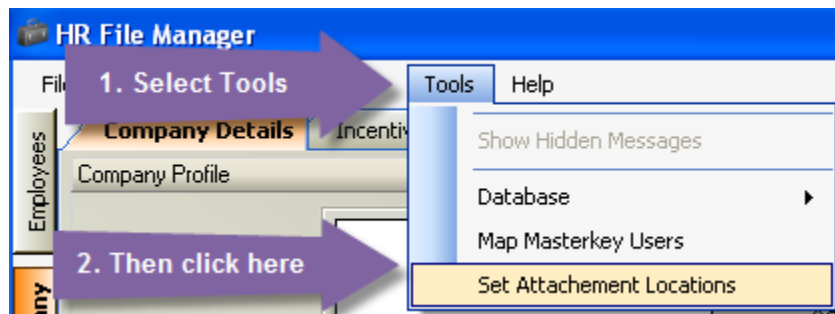
6. This window will then appear. Select the Network Location for Employee Attachments. Then click 'OK' and repeat the same process for 'Company Attachment Location' and click 'Save'



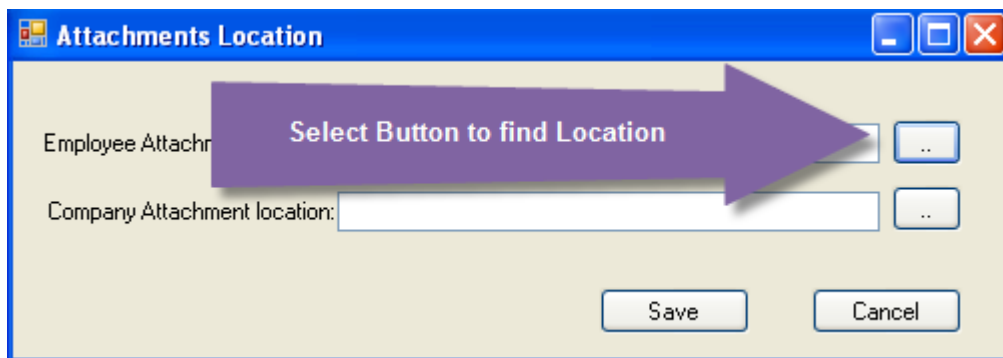
b. Setting a Default Location for a Multi-User Installation (Skip if you have a Basic Installation)

Before having the ability attach files to your Company and Employee profiles, you must first set a default location

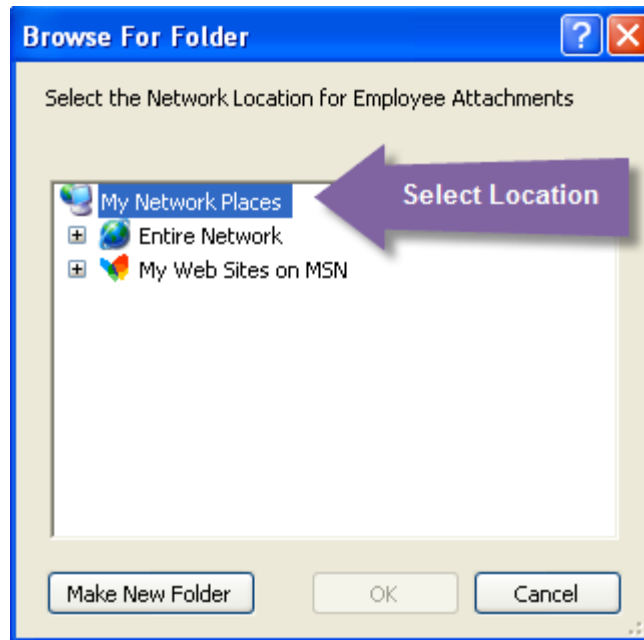
1. Choose '**Tools**' from the top left hand side of your screen, then choose '**Set Attachment Locations**'.



2. Then select the button right of the text bar to view your network.

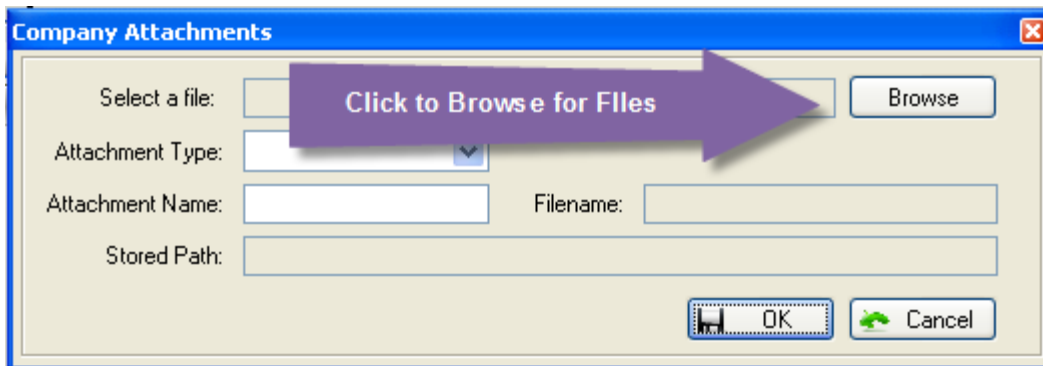


3. Then select the Network Location for Employee Attachment and click '**OK**' to add. Repeat the same process for '**Company Attachment Location**' and click '**Save**' to continue.



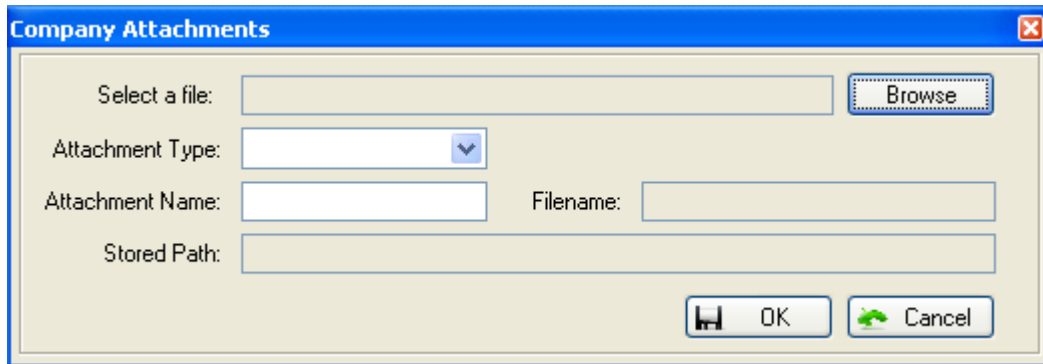
2.11.2 Attaching a New File

To attach a new file, click the 'Add New' button at the bottom. Click the 'Browse' button to select the desired file.



Select the correct Attachment Type to categorize the file. If you do not see the correct attachment type listed, you may add new Attachment Types by accessing the List Maintenance menu option and selecting Attachment Types.

Lastly, input a name for the attachment and click 'OK' to save.

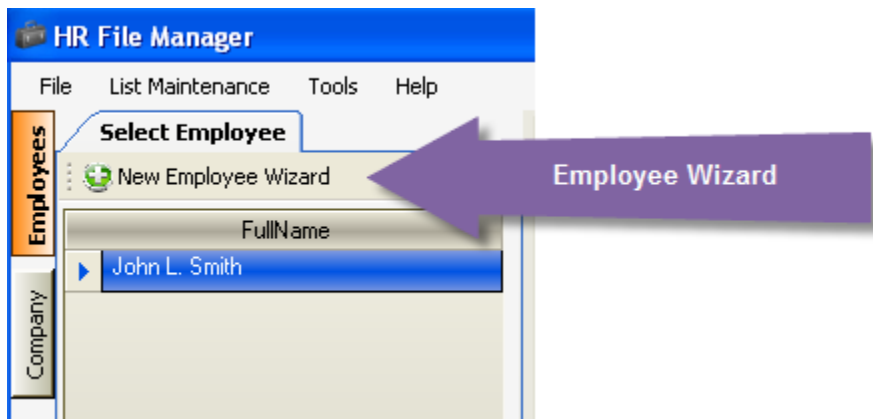


Once an attachment has been saved, you may click the 'Edit' button to edit any of the details. You may also click the 'View' button to open the attachment.

3.0 Adding Employees

Now that you have set up your company-specific information, you will want to begin adding employees. Begin by selecting the Employees tab.

Click the **'New Employee Wizard'** button in the top left of the screen. Alternatively, you may select File -> New Employee.



3.1 New Employee Wizard

Navigate through the wizard by filling out the relevant personal information for the employee. Click 'Next' and continue filling out the Government, Tax related information. Click 'Finish' to create the employee.

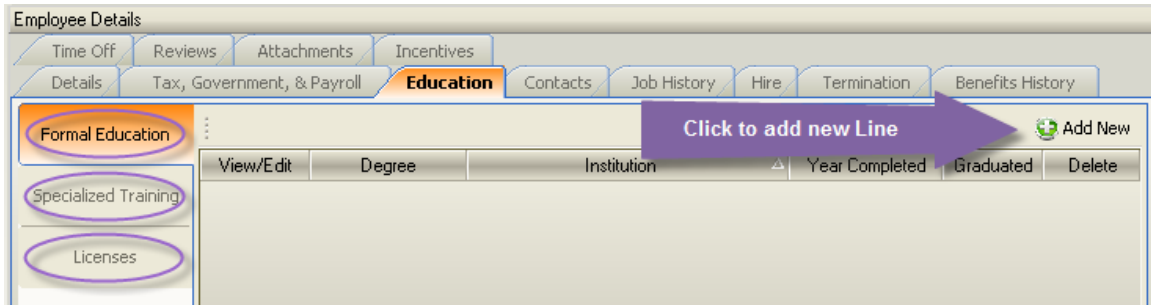
Employees may find it useful to print a copy of the Employee Data Sheet to use as an information gathering tool. The Data Sheet assembles the required information in the same order as called for in the New Employee Wizard.

Once the new employee has been created, you may add additional information by clicking on the employee's name at the top left of the screen.

The screenshot shows the 'Employee Data Management Wizard' window. The title bar reads 'Employee Data Management Wizard'. Below the title bar, there is a brief instruction: 'The New Employee Wizard populates the basic data needed to create an Employee File. Any of the data can be edited or added directly to the Employee File.' The form is divided into two main sections: 'Personal Information' and 'Employment Information'. The 'Personal Information' section includes fields for First, MI, Last, Address, Unit, City, State (dropdown), Zip, Primary Phone, Cell, Work, Ext, Email Home, Email Work, Drivers Lic. #, Drivers Lic. State (dropdown), Gender (dropdown), DOB (dropdown), Family Notes, and Hobby Notes. The 'Employment Information' section includes fields for Social Security, Current Salary (\$0.00), Hire Date (08/26/2009), EEO Code (dropdown), EEO Category (dropdown), Location (dropdown), Supervisor (dropdown), Position (dropdown), Pay Frequency (dropdown), Pay Type (dropdown), Commission Plan, Employee Status (dropdown), Area (dropdown), Department (dropdown), and Employee #. At the bottom of the form, there are 'Next' and 'Cancel' buttons. Two purple arrows with text are overlaid on the image: one pointing to the form fields with the text 'Fill Out Neccessary Information' (note the typo) and another pointing to the 'Next' button with the text 'Click Next to Conitue' (note the typo).

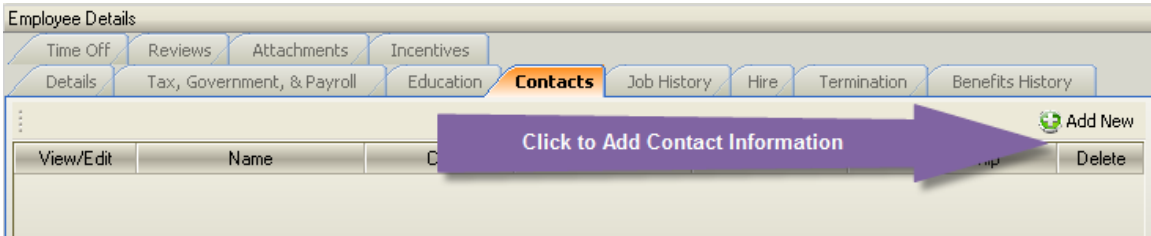
3.3 Education Tab

At the Education tab, click the 'Add New' button within the Formalized Education, Specialized Training, or Licenses sub-tabs to add any relevant education, training, or licenses. Note that the system will track “License” renewals based on the Due Date specified and company officials can generate reports of licenses that are due to expire.



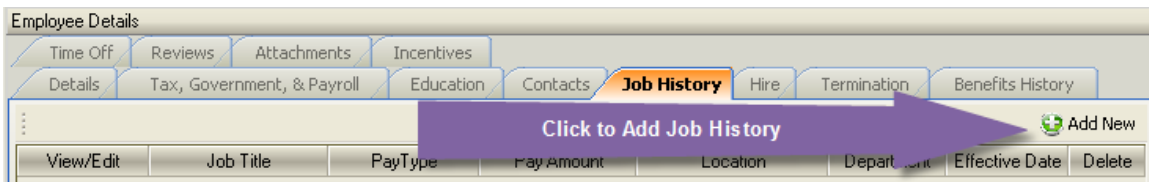
3.4 Contacts Tab

At the Contacts tab, click 'Add New' to add contacts for this employee. This area is where an employee's emergency contact information would be added.



3.5 Job History Tab

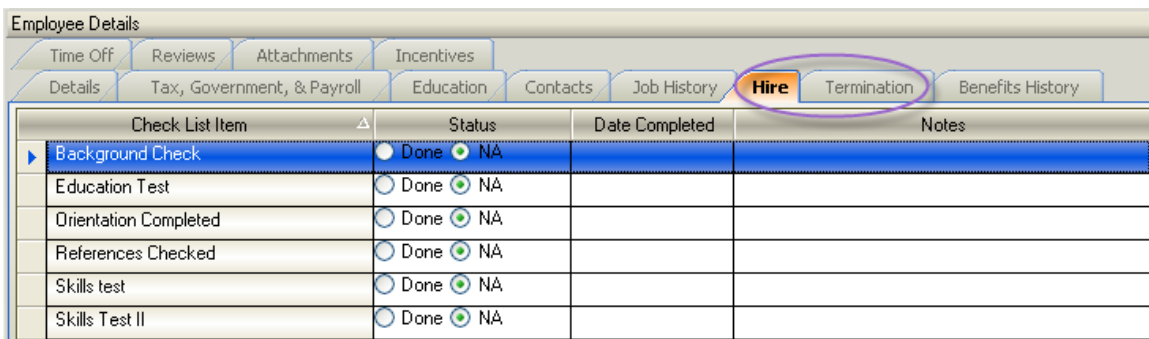
At the Job History tab, click 'Add New' to add past and present job history for this employee. For companies that have a substantial amount of history to enter, it may be useful to print a “Job History Worksheet” for each employee and use the worksheet to gather the data to be entered into the system.



Going forward, each time an employee changes Job Title, Location, Department or Pay Amount, the system will automatically generate a row in the Job History grid based on the Effective Date.

3.6 Hire and Termination Tabs

The 'Hire' and 'Termination' tabs contain a check list of relevant items that you specified when creating your company details. More specifically, refer back to the 'Check List Items' tab of your company details for these items.



3.7 Benefits History Tab

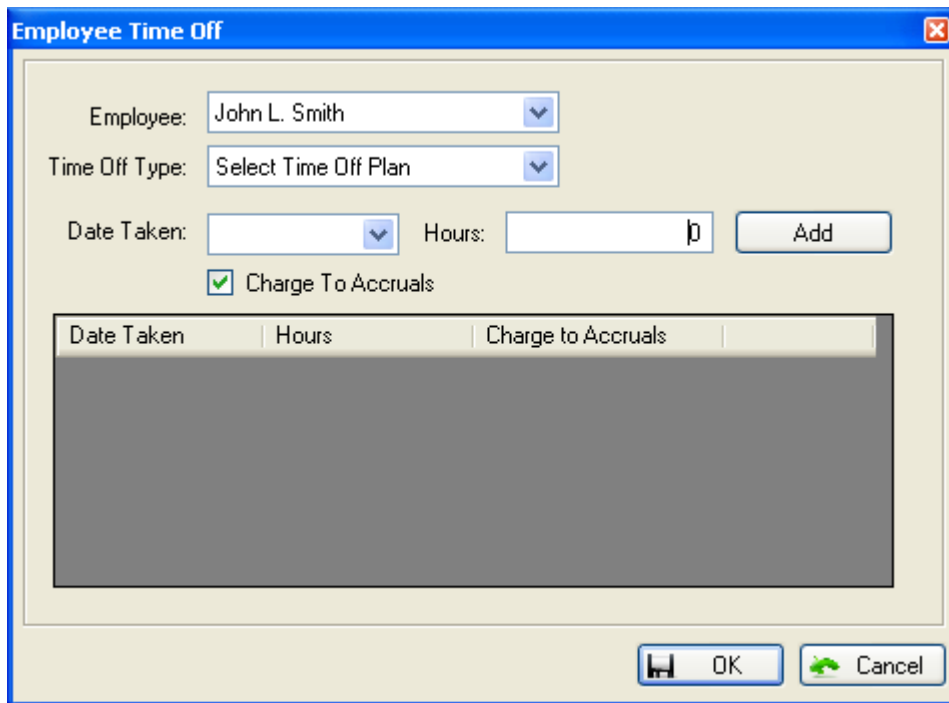
At the Benefits History tab, click the 'Add New' button to add any past and/or present benefits for this employee. The list of available benefits that your company offers is customizable at the Benefits tab of your company details.



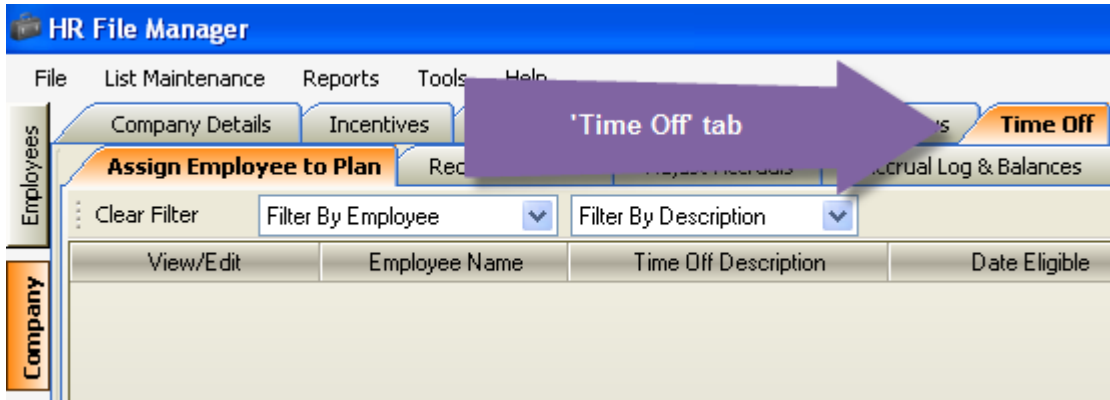
3.8 Time Off Tab

At the 'Time Off' tab, add any relevant history on this employee's accruals. Your 'Time Off Type' list is changeable at the Time Off tab of your company details.

Time Off is entered in a pop-up box that allows entry of multiple days for an employee in a single screen.

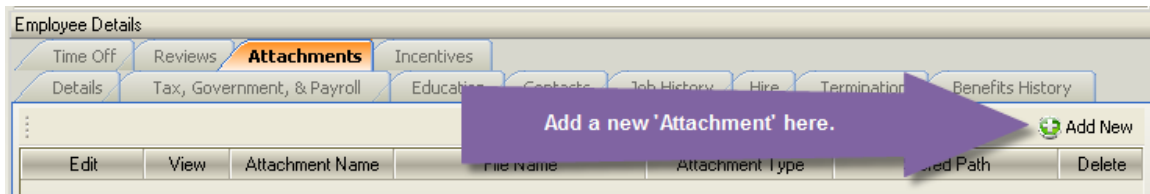


The Time Off can be entered for a single employee in the Employee section, or can be entered for multiple employees (one at a time) using the Time Off tab on the upper navigation bar in the Companies section. That Time Off tab has a sub-tab for “**Record Time Off**”.



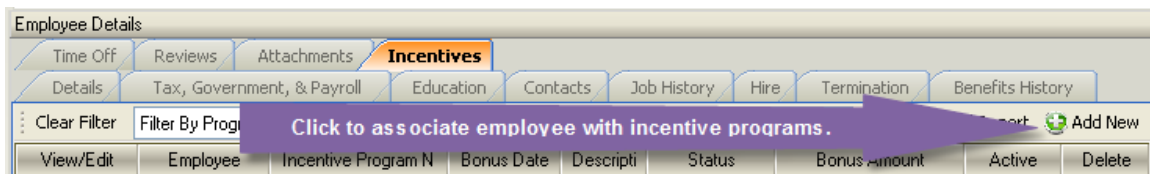
3.9 Attachments Tab

At the Attachments tab, click the 'Add New' button to add any external files specific to this employee.



3.10 Incentive Tab

Within the Incentives tab, click 'Add New' to associate this employee with any incentives programs. But an incentive program must be in place in the Company Section before you do so. You may also click 'Bonus Paid Report' to automatically compile a report of bonuses paid to this employee.

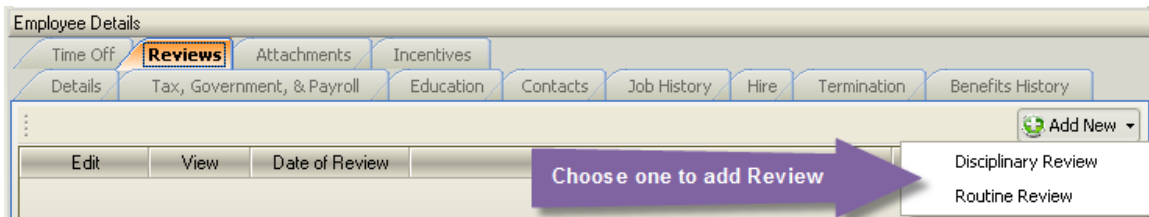


Note: Incentive programs are created under the Incentive tab of your company details.

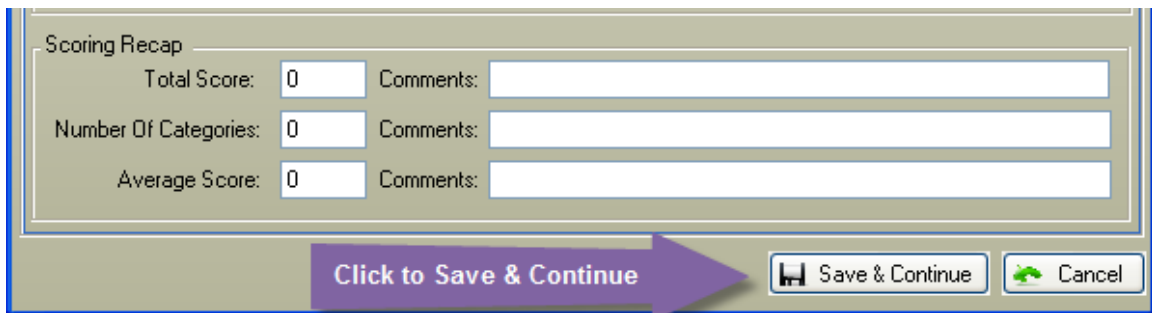
3.11 Reviews Tab

3.11.2 Adding an Employee Review

-Access the **'Reviews'** tab. Here you may generate Routine or Disciplinary reviews for an employee. When clicking the **'Add New'** button, choose which review you would like to create.



-For **'Routine Reviews'**, a window will appear. Enter the review details and click **'Save & Continue'** at the bottom of the window.



-Next, you will be taken to the '**Category Scores**'. Check an appropriate category for this review on the left. On the right side of the screen, choose the grading score and enter any appropriate comments. Once you have scored and commented, click '**Apply**' and continue this process with each relevant category. If desired, you have the option of using the predefined comments by clicking the 'Use Predefined Comments' button. Once you have completed the review, click the '**Save**' button.

Category	Score	Comments
<input type="checkbox"/> Ability to remain organized	1	Often loses things, misses meetings because of disorganization, upsets customers because lost information or material, important documents are often not filed .
<input type="checkbox"/> Appearance appropriate to workplace	2	Takes awhile to find documents
<input type="checkbox"/> Attendance	3	Workspace is functional with organized files, makes use of organizational tools to save time, needed information is easily available .
<input type="checkbox"/> Attention to company policies and procedures	4	Others easily find things he/she organizes, keeps numerous things organized at once, stress doesn't have an affect on good organization .
<input type="checkbox"/> Communicating in a clear and understandable manner	5	Identifies organizational needs of company, organization skills have caused others to rely on him/her as a model for their own, optimizes organizational skills and always seems on top of things .
<input type="checkbox"/> Dependability		
<input type="checkbox"/> Employee involvement/participation in team effort		
<input type="checkbox"/> Exercise of good judgment		
<input type="checkbox"/> Interaction and communication with customers		
<input type="checkbox"/> Interpersonal relationships and communication with co-workers		
<input type="checkbox"/> Overall performance rating		
<input type="checkbox"/> Providing information about workplace experiences		
<input type="checkbox"/> Quality of employee's work		
<input type="checkbox"/> Responsiveness to changing work requirements		
<input type="checkbox"/> Taking initiative to achieve goals and complete assignments		

Selected Predefined Comment

Use Predefined Score Comments

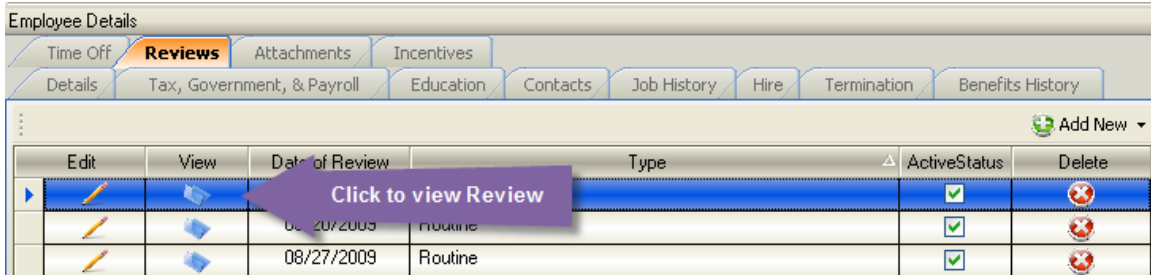
Final Score Comment

Apply

Preview Save Cancel

3.11.3 How to View an Employee Review

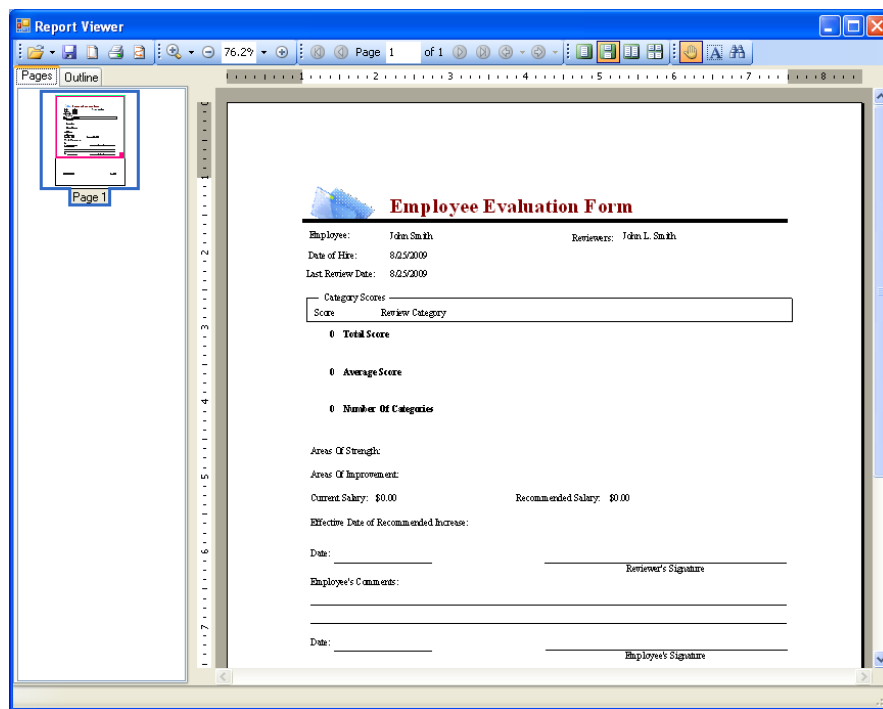
-Within the 'Reviews' tab, click the button in the View column for your review. This will generate a report of the review. Within the report viewer, you may save the review as an external file. You may also print the review.



The screenshot shows the 'Employee Details' interface with the 'Reviews' tab selected. A table lists reviews with columns for Edit, View, Date of Review, Type, ActiveStatus, and Delete. A purple callout box points to the 'View' button for the review dated 08/27/2009, with the text 'Click to view Review'.

Edit	View	Date of Review	Type	ActiveStatus	Delete
		08/20/2009	Routine	<input checked="" type="checkbox"/>	
		08/27/2009	Routine	<input checked="" type="checkbox"/>	

Routine Review



The screenshot shows the 'Report Viewer' window displaying an 'Employee Evaluation Form'. The form includes fields for Employee Name (John Smith), Reviewer Name (John L. Smith), Date of Hire (8/25/2009), and Last Review Date (8/25/2009). It also features sections for Category Scores, Total Score, Average Score, and Number of Categories, all currently showing 0. There are sections for Areas of Strength and Areas of Improvement, Current Salary (\$0.00), Recommended Salary (\$0.00), and Effective Date of Recommended Increase. Signature lines are provided for the Reviewer and the Employee.

Employee Evaluation Form

Employee: John Smith Reviewer: John L. Smith
Date of Hire: 8/25/2009
Last Review Date: 8/25/2009

Category Scores

Score	Review Category
0	Total Score
0	Average Score
0	Number of Categories

Areas Of Strength:
Areas Of Improvement:

Current Salary: \$0.00 Recommended Salary: \$0.00
Effective Date of Recommended Increase:

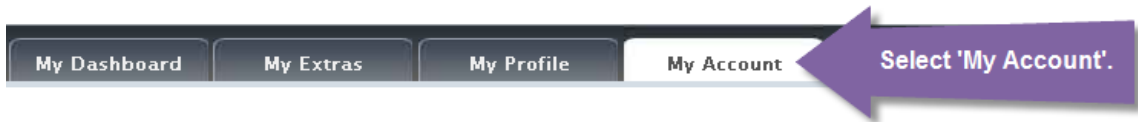
Date: _____ Reviewer's Signature _____
Employee's Comments: _____
Date: _____ Employee's Signature _____

4.0 Mapping Users and Employees

4.1 Multi-User Mapping

For a “**Multi-User Installation**”, persons other than the Primary Administrator will be performing certain functions inside the Employee File Manager.

Roles are established in the ‘My Account’ section of your Dashboard.



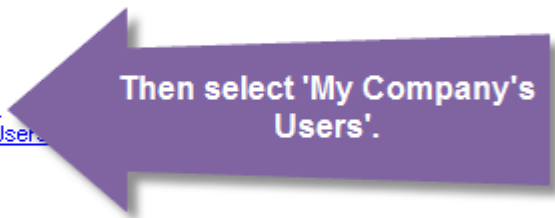
Then select “**My Company’s Users**” and assign access to Employee File Manager to the appropriate employees.



My Account

My Company

- [My Company Profile](#)
- [My User Profile](#)
- [My Company's Users](#)
- [Manage Application Users](#)



In making the assignment, you will be asked to specify one of three user types:

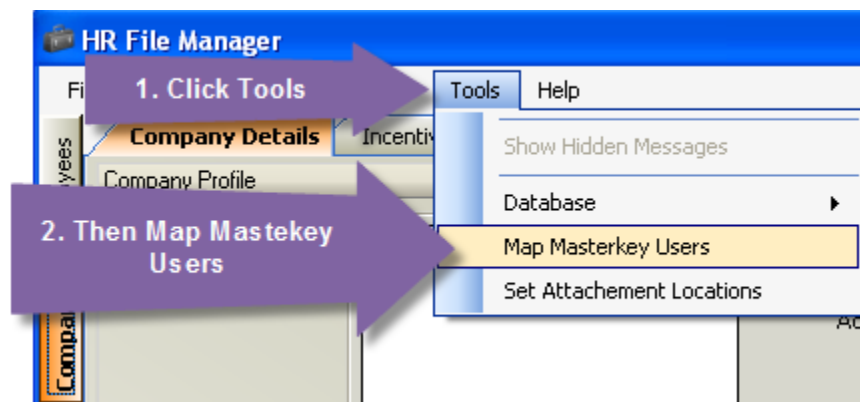
1. Administrator
2. HR User
3. Departmental User (Reviewer)

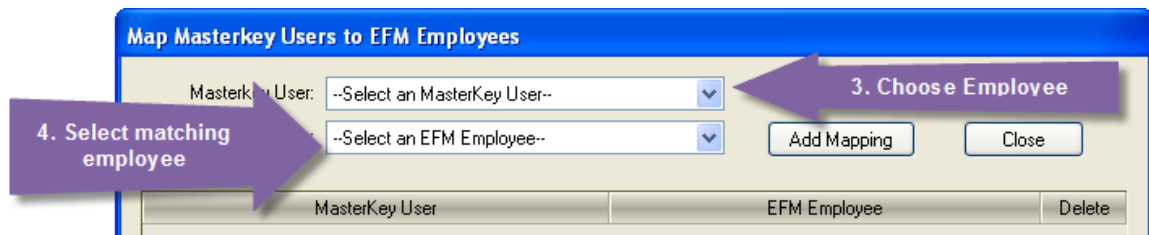
Both Administrators and HR Users will be able to access the Employee Data for all employees. The difference is that the HR Users will not see certain information that is visible to Administrators.

Departmental Users (or Reviewers) are only able to view employees who are their direct reports based on the positions that have been established. The system will be unable to determine who those direct reports are until the Administrator maps the “**username**” to the “**Employee Name**”. This step essentially connects the Reviewer to the employees that are under their hierarchy.

4.1.1 Mapping Users

To map the users and employees, go to “**Tools**” in the top level of the Employee File Manager navigation and select “**Map Masterkey Users**”. Choose a “**User**” from the drop dropdown, then select the matching “**Employee**” from the other dropdown. With both matching names selected, choose “**Add Mapping**” to associate the two in the system.

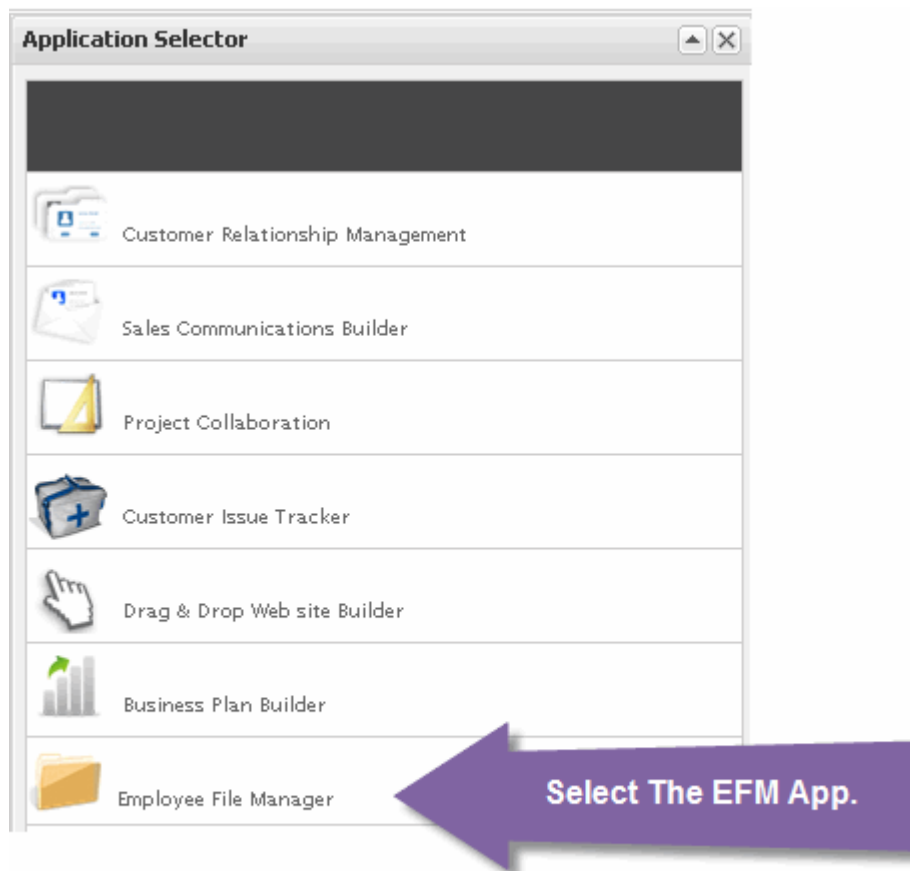




4.2 Adding Users to another Computer.

If you have already installed a Multi-User account and need to add users to another computer follow the instructions below.

1. Begin by selecting the Employee File Manager Application in your User Dashboard.



2. You will then be taken to the EFM install site where you will then select the 'Install' tab.

The screenshot shows a web page with a dark navigation bar at the top. The 'Install' tab is selected, and a purple arrow points to it with the text 'Select 'Install''. Below the navigation bar, the page title is 'MasterFile Software Activation'. The main content area contains instructions for activation, including a red serial number: **1BF16CB5-4C8F-4D2D-8DAB-C862483D841D**. An 'Online Activation' dialog box is overlaid on the right side of the page. The dialog box has a blue title bar and contains the following text: 'Thank you for using MasterFile.', 'Before you can use the application, you will need to activate it. An internet connection is required to activate the Employee File Manager.', and 'Please enter your user name and password that you used when you created your online account and the serial number provided for your subscription. Then, click Activate.' Below the text are two input fields: 'User name' with the value 'John' and 'Password'.

About Install **Select 'Install'.** Additional Forms and Resources

MasterFile Software Activation

When you first run the MasterFile application, you will be asked to activate your copy. Your Serial Number for activation is:

1BF16CB5-4C8F-4D2D-8DAB-C862483D841D

When the application starts, the activate page will be displayed.

Enter your Serial Number and your User Name and Password that you use to access your MasterSuite Dashboard and then click "Activate".

Online Activation

Thank you for using MasterFile.

Before you can use the application, you will need to activate it. An internet connection is required to activate the Employee File Manager.

Please enter your user name and password that you used when you created your online account and the serial number provided for your subscription. Then, click Activate.

User name

Password

3. To add users to another computer or workstation, you may select the 'Already Installed Multi-User' option to add a user .

Install MasterFile

Basic Installation



This is the option chosen by most companies with under 20 employees and a single HR Administrator.

Both of the initial users and any incremental users will all perform their HR tasks on the same computer.

Note – a Basic Installation can be reconfigured as a Multi-User Installation at a later date.

[Click Here to Begin Basic Installation](#)

Multi-User Installation



Choose this option if you require multiple users that need to access data or perform reviews from their own computers.

Additional applications of the MasterFile or an Employee Review Manager (for employee reviews only) can then be installed on each user's computer.

[Click Here to Begin Multi-User Installation](#)

Already Installed Multi-User



Choose this option if you have already downloaded and Installed a Multi-User MasterFile application.

Here you may install additional applications on other user's computers.

Choose between the MasterFile and the Employee Review Manager (for employee reviews only) to put on each workstation.

[Click Here to Add to Another Workstation](#)

Select to add another user.

Then follow the directions to add the Employee file Manager to the Users computers.