Module 1: Workforce Planning & Scheduling

This module helps HR and managers plan staffing, create work schedules, and ensure we have the right people in the right places at the right time.

For Administrators:

1. **Workforce Planning Dashboard:**

   - **What it is:** Your main control center for scheduling.
   - **Features:**
     - See at a glance how many employees are scheduled for *today*.
     - View the total number of staff *required* for today's operations (if defined for shifts).
     - See which departments have staff working today.
     - Get a count of total shift assignments for the *next 7 days*.
     - (Optional, if active) See pending overtime requests and approved overtime hours for the week.
   - **How to Use:** Use this dashboard for a quick daily check on staffing levels and to access other scheduling tools via the "Quick Action" links.

2. **Manage Shifts (Shift Definitions):**

   - **What it is:** A place to create and manage all the standard work shifts in our company (e.g., "Morning Shift," "Night Shift").
   - **Features:**
     - **Add New Shift:** Define a shift by giving it a name (e.g., "Early Bird 7am-3pm"), setting its start time and end time. You can also note how many staff are typically needed for that shift.
     - **Edit/Delete Shifts:** Modify existing shift details or remove shifts that are no longer in use (you can't delete a shift if someone is currently scheduled for it).
   - **How to Use:** This is the first step in scheduling. Define all possible shift patterns here so they can be assigned to employees later.

3. **View All Employee Schedules:**

   - **What it is:** A comprehensive weekly calendar showing who is scheduled to work.
   - **Features:**
     - Displays a grid with employee names down the side and days of the week across the top.
     - Each cell shows the shift(s) an employee is assigned to on a particular day, including times.
     - Easily navigate to "Previous Week," "Current Week," or "Next Week."
     - The current day is highlighted for quick reference.
   - **How to Use:** Review this page to understand overall staffing for any given week, check individual schedules, and visually identify potential scheduling gaps.

4. **Demand Forecasting Reports:**

   - **What it is:** A tool that looks at *past scheduling patterns* to give a basic idea of future staffing levels if those patterns continue.
   - **Features:**
     - Select how many "History Days" to analyze and how many "Forecast Days" to project.
     - **Historical Summary:** See average daily staff numbers, the busiest day historically, the hour with the most concurrent staff, the hour when most shifts start, and the most frequently used shift type.
     - **Historical Charts:** Visual graphs showing daily staffing levels over time, average staff per day of the week, common shift types, and when shifts typically start.
     - **Projected Needs:** A line chart showing the projected number of staff needed each day in the future. Also includes a "heatmap" visualizing busier/quieter hours for future days.
   - **How to Use:** Use this to understand past trends (e.g., "We usually schedule more people on Fridays"). The projections are *guidelines only* and should be used alongside your knowledge of upcoming business needs, holidays, etc. **A prominent warning on this page explains these limitations.**

5. **Resource Allocation Dashboard:**

   - **Purpose:** See how employees are currently distributed across different departments and easily move them if needed.
   - **Features:**
     - **Summary:** See total active employees, how many are assigned to a department, how many are unassigned, and the number of departments with staff.
     - **Reallocate Employee Form:**
       - Pick an employee from a list.
       - Assign them to an existing department, type in a name to create a new department for them, or choose to "Unassign" them (remove from any department).
     - **Department View:** See a list of all departments, the number of employees in each, and the names of those employees.
     - **Unassigned List:** See a list of employees not currently assigned to any department.
     - **Chart:** A pie chart shows the percentage of employees in each department.
   - **How to Use:** If a department is short-staffed or over-staffed, or if an employee's role changes, use this page to update their department assignment quickly.

For Employees (Clients):

1. **My Schedule Overview (Workforce Planning Dashboard):**

   - **What it is:** Your personal quick view of upcoming work.
   - **Features:**
     - Clearly shows your **very next scheduled shift** (date, time, shift name).
     - Lists any shifts you have **today**.
     - Tells you how many shifts you have in the **next 7 days**.
   - **How to Use:** Check this daily for a quick reminder of your work commitments. Use the "View Full Schedule" link for more details.

2. **View My Shifts (Full Schedule):**

   - **What it is:** Your detailed personal work calendar.
   - **Features:** Displays a list of all your assigned shifts for a set period (e.g., the last two weeks and the next two weeks). Shows date, day of the week, shift name, start and end times, and department (if applicable).
   - **How to Use:** Review this to see your complete schedule, confirm your shifts, and plan accordingly. Today's shifts are highlighted.

Module 2: Employee Engagement & Surveys

This module is designed to help us listen to our employees, foster a culture of appreciation, and build a more engaged workforce.

For Administrators:

1. **Engagement Dashboard (Relevant parts of Admin Dashboard):**

   - **What it is:** Your main view for engagement activities.
   - **Features:** See how many surveys are currently active, the number of recognitions given recently. View a feed of the latest recognitions.
   - **How to Use:** Quickly access tools to create surveys, manage recognition programs, or review feedback.

2. **Survey Management:**

   - **Create/Edit Surveys:**
     - Design surveys with a title and description.
     - Set how often they should run (e.g., one-time, quarterly).
     - Add various types of questions: open text for comments, scales (like 1-5 or 1-10), yes/no, and multiple choice.
     - Activate surveys to make them available to employees, or keep them as drafts.
   - **View Survey Results (Future Enhancement / Separate Page):**
     - Analyze responses to see overall trends, average scores for scale questions, and read open-text comments.
   - **How to Use:** Create surveys to gather feedback on topics like job satisfaction, work environment, or new initiatives. Analyze results to make informed decisions.

3. **Recognition Program Management:**

   - **Define Programs:** Set up formal recognition initiatives, like "Employee of the Month" or "Innovation Award." Include details about the program and any rewards.
   - **View Company Feed:** See all recognitions given across the company, both peer-to-peer and formal program awards.
   - **How to Use:** Establish official ways to reward employees. Monitor the feed to see positive interactions.

4. **Review Employee Feedback:**

   - **View Submissions:** Read all feedback submitted by employees. If submitted anonymously, the submitter's name will not be shown.
   - **How to Use:** Regularly review feedback to understand employee concerns, suggestions, and overall morale.

For Employees (Clients):

1. **My Engagement Dashboard (Relevant parts of Client Dashboard):**

   - **What it is:** Your portal for engagement activities.
   - **Features:** See a list of "Available Surveys" you need to complete and any "Pending Policy Acknowledgements." View "My Recent Recognitions" (awards or kudos you've received).
   - **How to Use:** Check this page for tasks like taking surveys or acknowledging new policies.

2. **Take Surveys:**

   - **Available Surveys List:** See all surveys currently assigned to you that you haven't completed.
   - **Take a Survey:** Click "Start Survey" to open it. Read the questions and provide your answers using the provided options (text boxes, radio buttons, etc.). Click "Submit My Responses" when done. Your responses help us improve!
   - **How to Use:** Share your honest opinions to contribute to a better workplace.

3. **Recognition:**

   - **View Company Feed:** See a live feed of colleagues being recognized for their good work.
   - **Give Recognition:**
     - Want to appreciate a coworker? Use this feature!
     - Select the employee you want to recognize from a dropdown list.
     - Write a specific reason why you are recognizing them.
     - Submit your "Kudos."
   - **How to Use:** Help build a positive environment by acknowledging the efforts and achievements of your peers.

4. **Submit Feedback:**

   - **Share Your Thoughts:** Have a suggestion, concern, or idea? Use this form.
   - **Anonymous Option:** You can choose to submit your feedback anonymously by checking a box. If you do, your name will not be attached.
   - **How to Use:** A direct channel to provide constructive feedback to management or HR.

Module 3: HR Policies & Advanced HR Functions

This module ensures all employees have access to up-to-date company policies, helps HR track compliance, supports talent development through succession planning, and provides deeper workforce insights through analytics.

For Administrators:

1. **HR Admin Dashboard (Relevant parts of Admin Dashboard):**

   - **What it is:** Overview of policy, succession, and analytics activities.
   - **Features:** See the number of "Active Policies," "High-Potential Employees," and "Active Development Plans."
   - **How to Use:** Quick links to "Upload Policy," "Identify HiPo," and "View Workforce Analytics."

2. **Policy Management:**

   - **Create/Edit Policies:**
     - Organize policies by "Category" (e.g., "Leave Policy," "IT Security").
     - Enter a policy title, version number, and effective date.
     - Write the policy content directly in a text editor OR upload a policy document (PDF, Word).
     - Set the policy status (Draft, Active, Archived).
   - **List All Policies:** View a table of all company policies with details like category, version, and status. From here, you can edit policies or view their compliance.
   - **View Policy Compliance:**

- Select a specific policy.
- See a list of all active employees and whether they have acknowledged reading the *current version* of that policy.
- Filter the list to see who has acknowledged, who is pending, or search by employee name.
  - **How to Use:** Maintain an organized, up-to-date library of all company policies. Ensure employees are aware of and acknowledge critical guidelines.

3. **Succession Planning:**

   - **Manage High-Potential (HiPo) Employees:**
     - Identify and designate employees as "High-Potential."
     - Record the date they were identified, their potential level (e.g., High, Medium), their readiness timeline (e.g., "Ready Now," "1-2 Years"), key strengths, areas for development, and the reason for their HiPo status.
     - View and manage the list of all HiPo employees.
   - **Manage Employee Development Plans:**
     - Create individual development plans for employees.
     - Link a plan to an employee, give it a title, state its primary goal, set start/target completion dates, and track its status (e.g., Draft, Active, Completed).
     - When viewing/editing a plan, see a list of associated "Plan Items" (like specific trainings or projects assigned to that employee as part of their plan).
   - **Manage Leadership Programs:**
     - Define internal or external leadership training programs.
     - Record program name, description, provider, dates, target audience, and status.
     - Maintain a list of all available leadership programs.
   - **How to Use:** Systematically identify and develop future leaders and key talent within the organization.

4. **Workforce Analytics:**

   - **Analytics Dashboard:** (Shared with Module 1) Provides a high-level overview of workforce data.
   - **Headcount Report:** Shows current number of active and inactive employees. *Can show breakdowns by department/location if this data is synced into* `hr_employees`.
   - **Turnover Report: (Limited)** Shows trends in active vs. inactive employees based on sync times. *To calculate true turnover rates, the* `hr_employees` *table needs accurate* `hire_date` *and* `exit_date` *for all employees, properly synced from payroll.*
   - **Diversity Report: (Data Dependent)** Aims to show charts on workforce demographics like gender, ethnicity, and age groups. *This report requires these specific data fields to be present and populated in the* `hr_employees` *table via the synchronization script.*
   - **How to Use:** Use these reports to gain insights into your workforce composition, track changes, and support HR decision-making. The quality of analytics heavily depends on the completeness of data in the `hr_employees` table.

For Employees (Clients):

1. **My HR Dashboard (Relevant parts of Client Dashboard):**

   - **What it is:** Your access point for policies.
   - **Features:** See a list of "Pending Policy Acknowledgements" that require your attention.
   - **How to Use:** Quickly see if there are new or updated policies you need to review.

2. **View Company Policies:**

   - **List Policies:** Browse all *active* company policies, often grouped by category (e.g., "General HR," "Leave").
   - See the policy title, version, and whether you've "Acknowledged" the current version or if "Action Required."
   - **View a Specific Policy:**
     - Read the full policy content. If it's a file, you'll see a download link.
     - If you haven't acknowledged the current version, you'll see a checkbox: "I have read and understood..." and an "Acknowledge Policy" button.
     - If you've already acknowledged it, the system will show you the date you did so.
   - **How to Use:** Stay informed about company rules, procedures, and guidelines. Fulfill your responsibility to acknowledge important policies.