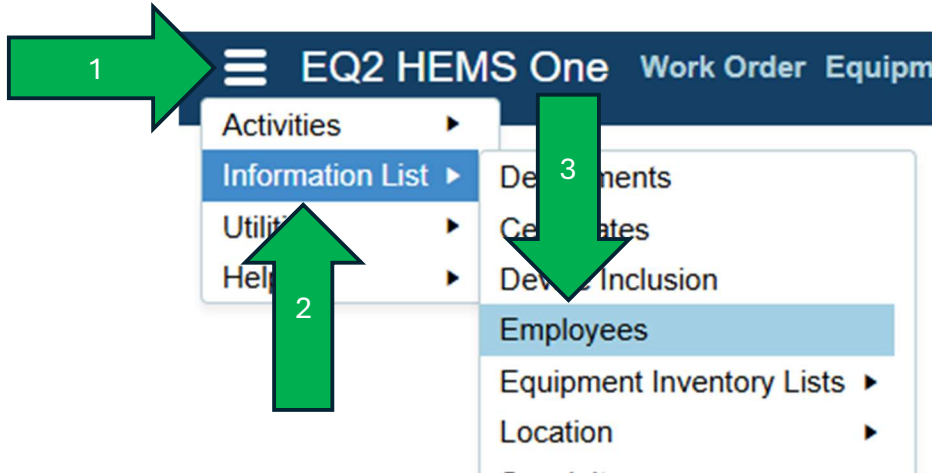


HEMS One: The Employee Record

To access the Employee module, click on the hamburger menu in the upper left of the main HEMS One window (1), then select the Information Lists menu (2), followed by the Employees submenu (3).






The Employee Record

The employee record is made up of six tabs: Employees, Address, Attachments, Certificates, User, and Team.

The screenshot shows the 'Employees Add/Edit' form in the HEMS One application. The form has a blue header bar with the title 'Employees Add/Edit' and window control icons. Below the header, there are six tabs: 'Employees', 'Address', 'Attachments', 'Certificates', 'User', and 'Team'. The 'Employees' tab is selected and highlighted with a green box. The form contains various input fields for employee information, including 'Initial', 'Employee #', 'Rate' (with a '\$' symbol and '0.00'), 'Specialty' (with 'NONE' selected), 'First Name', 'MI', 'Last Name', 'Start Date' (with a calendar icon), 'Department' (with 'NONE' selected), 'Location' (with 'NONE' selected), 'Shift Name' (with 'NONE' selected), 'Termination Date' (with a calendar icon), 'Storage Location' (with 'NONE' selected), 'Approval Mgr', 'Min Limit' (with '0.00'), and 'Max Limit' (with '0.00'). There is also a 'Notes' field and a set of checkboxes for 'Active', 'Eng Emp', 'Vendor', and 'Shared'. The 'Active' and 'Eng Emp' checkboxes are checked.

HEMS One: The Employee Record

Employees Tab

1. **Initial:** The employee initials.
2. **Employee #:** The employee number assigned to the employee.
3. **Rate:** The hourly labor rate for the employee.
4. **Specialty:** The work specialty of the employee.
5. **First Name:** The first name of the employee.
6. **MI:** The middle initial of the employee.
7. **Last Name:** The last name of the employee.
8. **Start Date:** The employee's start date.
9. **Department:** The employee's Department.
10. **Location:** The employee's location.
11. **Shift Name:** The name of the employee's work shift.
12. **Termination Date:** The termination date of the employee.
13. **Storage Location:** The storage location assigned to the employee (e.g. Van 3).
14. **Approval Mgr:** The approval manager for parts requests submitted by the employee.
15. **Min Limit:** The minimum limit of spending authority.
16. **Max Limit:** the maximum limit of spending authority.
17. **Notes:** This is an open text field.
 - a. To add a timestamp to the Notes field, use the clock icon to the right of the field .
 - b. To expand the Notes field, use the Show Expanded View icon .
 - c. To use predefined text in the Notes field, use the Predefined Text icon .

HEMS One: The Employee Record

- 18. **Active Box:** If this box is checked, the Employee record is active.
- 19. **Eng Emp:** If this box is checked, the Employee can be assigned work orders.
- 20. **Vendor:** If this box is checked, the Employee record is a vendor.
- 21. **Shared:** If this box is checked, the Employee is shared between service areas.

Address Tab

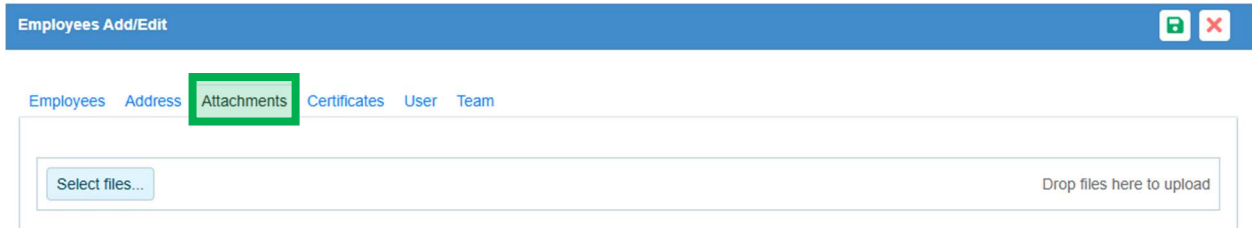
The screenshot shows a web application interface for editing an employee record. At the top, there is a blue header bar with the text 'Employees Add/Edit' and two small icons (a green square and a red 'X'). Below the header, there is a navigation menu with tabs: 'Employees', 'Address' (highlighted in green), 'Attachments', 'Certificates', 'User', and 'Team'. The main content area contains several input fields for contact information:

- Office Phone: A single-line text input field.
- Home Phone: A single-line text input field.
- Fax: A single-line text input field.
- Beeper: A single-line text input field.
- Address: Two stacked single-line text input fields.
- City: A single-line text input field.
- State: A single-line text input field with a dropdown arrow icon.
- Zip: A single-line text input field.
- Country: A single-line text input field.
- Email: A single-line text input field.

- 1. **Office Phone:** The Employee's office phone number.
- 2. **Home Phone:** The Employee's home phone number.
- 3. **Fax:** The Employee's business fax number.
- 4. **Beeper:** The Employee's beeper number.
- 5. **Address:** The Employee's business address.
- 6. **City:** The city for the address.
- 7. **State:** The State for the address.
- 8. **Zip:** The zip code for the address.
- 9. **Country:** The country for the address.
- 10. **Email:** the employee's email address.

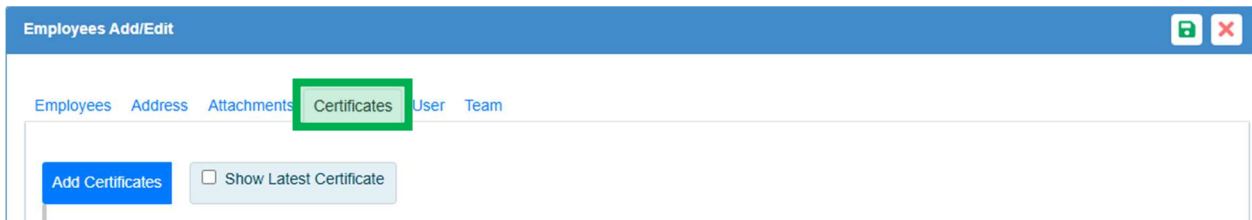
HEMS One: The Employee Record

Attachments Tab



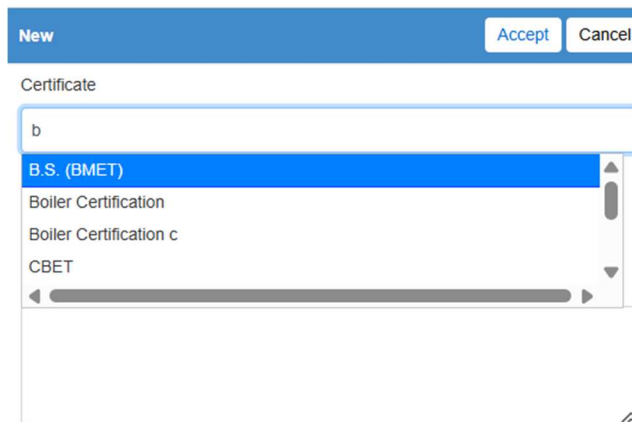
Use this tab to upload any attachment for the Employee record.

Certificates Tab



Use this tab to view or add any defined Certificates on the Employee record.

To add a Certificate, click on the Add Certificates button and start typing in the Certificate field.



To edit a Certificate, click on the edit icon to the far-right of the certificate listing (1). To delete a Certificate, use the Delete icon (2).

Certificate	Specialty	Date	Notes
B.S. (BMET)	22 Jul update	05/23/2025 16:38	 

Green arrow 1 points to the edit icon. Green arrow 2 points to the delete icon.

HEMS One: The Employee Record

User Tab

The User tab is where security permissions are defined for the Employee.

The screenshot shows the 'Employees Add/Edit' interface with the 'User' tab selected. The form is organized into three main sections:

- Identification:** Contains a 'User Name' text field, a 'Default Service Area' dropdown menu (currently set to 'Shared Information'), and a 'Password' text field.
- Permissions:** Contains two dropdown menus labeled 'Control' and 'Menu', both set to '001 | Managers permissions template'. Below each dropdown is a blue 'Permissions' button.
- Login:** Contains two checkboxes: 'Status' and 'security'.

Identification & Password

1. **User Name:** the username of the Employee.
2. **Default Service Area:** the primary service area for the Employee.
3. **Password:** the Employee password for accessing the application.

Permissions

1. **Control:** The permission group granted for what the Employee can control in the application. Use the Permissions button to see or assign the available options.
2. **Menu:** The permission group granted for what the Employee can see in the application. Use the Permissions button to see or assign the available options.

Login

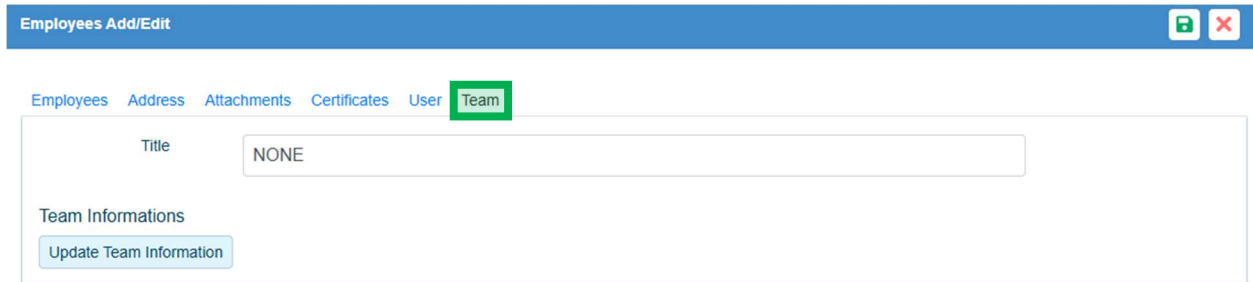
1. **Status:** If the user is logged in, this box will be checked.
2. **Security:** If this box is checked, this Employee can assign security profiles to other users.

HEMS One: The Employee Record

Team Tab

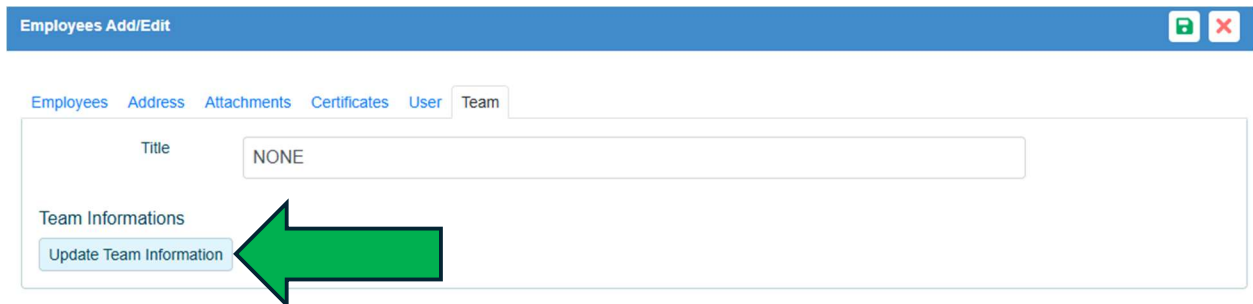
Teams are groups of Employees. If a Team is assigned to a work order, every member of the team can see the assignment.

If the employee record is for a Team, the Team tab is used to define the Employees included on the Team.



The screenshot shows the 'Employees Add/Edit' form with a blue header bar containing a save icon and a close icon. Below the header, there are several tabs: 'Employees', 'Address', 'Attachments', 'Certificates', 'User', and 'Team'. The 'Team' tab is highlighted with a green border. The main content area contains a 'Title' field with the value 'NONE' and a 'Team Informations' section with an 'Update Team Information' button.

The Team Title is a type-ahead field. The Update Team Information button allows Employees to be added or removed from a Team.



This screenshot is identical to the one above, but with a large green arrow pointing to the 'Update Team Information' button in the 'Team Informations' section.