



Knowledgeone^{K1}

USING KNOWLEDGEONE^{K1} AS A HUMAN RESOURCES (HR)
MANAGEMENT SOLUTION

Using Knowledgeone^{K1} as a HR Management Solution

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Single Table-Centric

Like all Personalities in Knowledgeone^{K1} (K1), HR Management is single table centric. This means one main table in Knowledgeone^{K1} links to all HR information in other tables. In the case of HR, this single table is the Person table.

The K1 single table-centric approach means a typical HR user would usually only access the Person table and would then be able to easily and quickly see all linked information on any employee from within this table just by clicking on the various links within the Person table.

If you refer to the K1 online help system and search on "Tables and Personalities" you will see a matrix clearly indicating which tables would be used by each personality, including HR.

The screenshot shows a search interface with a search bar containing 'Tables and Personalities'. The search results page is titled 'Tables and Personalities' and includes a table with columns for various K1 tables: RM, EDMRS, Imaging, WorkFlow, HR, Asset, Help, and Complaint. The 'AuditTrail' row is highlighted in yellow, indicating it is common to most personalities.

K1 tables	RM	EDMRS	Imaging	WorkFlow	HR	Asset	Help	Complaint
Activity							X	X
AuditTrail	X	X	X	X	X	X	X	X

Please use this matrix as a guideline, especially when first deciding how to implement your HR application in K1. Remember, K1 allows you to change both the data model and any process so you should view the 'out-of-the-box' HR Personality in K1 as an 85% generic HR solution, ready for you to modify to your exact requirements. We have done our best to 'guess' the data and links required in any HR operation and have pre-created most of the tables, fields and links required.

This paper will walk you through our 'out-of-the-box' HR configuration and explain how we expect it to be used.

Please begin with a short overview in the K1 online helps screens; search on HR Management as follows:

The screenshot shows a search interface with a search bar containing 'HR management'. The search results page is titled 'Human Resources Management' and includes an 'Overview' section stating 'HR Management in K1 is Person Table centric.'

What Does An HR System Do?

Ideally, an HR system allows an organization to enter, access and update all the information required to maintain an up-to-date and searchable database of employee information including name, home address, resume, test results, qualifications, salary reviews, etc.

It should also facilitate the normal business processes involved in HR including the ability to search the employee database based on a set of criterion such as age, experience, marital status, qualifications, experience, availability for transfer, job reviews, etc.

For example, if an organization has a requirement for an experienced project manager for a mining consulting job in Mozambique for six months but living out of a male-only mining compound it would want to search its employee database for a male employee who has the prerequisite mining degree and experience and who was prepared to travel on extended assignments and was available during the projected timeframe.

Similarly, the HR system should allow the organization to implement an employee review system based on a selection of criteria, (e.g., next review date), such that the HR manager would be automatically reminded of each employee's coming review in a stated time, for example, one month prior to the next review date.

How Do We Suggest The 'Out-Of-The-Box' HR System Be Used?

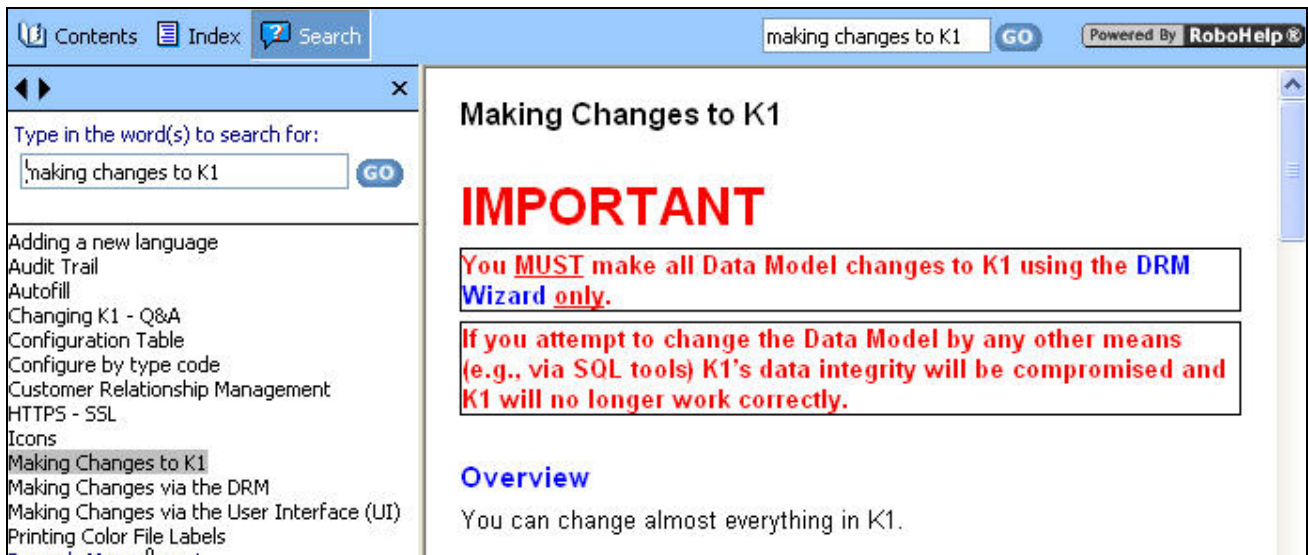
Firstly, as with all K1 'out-of-the-box' Personalities, please try to make best use of the existing tables, fields and links BEFORE creating new tables, fields or links. Remember that some of the existing fields and links may be 'hidden' (by us in the standard release) or may be hidden by you. Also remember that you can change any existing table or field using the DRM. Your objectives should always be to implement your HR system using the standard tables supplied with K1. This is because the K1 data model has been carefully designed to be a very efficient data model with no duplication of data. If you maintain the existing tables but implement your changes by adding and modifying fields, links and processes then you are more likely to maintain the efficient data model.

If you have to add new tables then please ensure that someone familiar with relational database design is on hand to review the proposed changes. It is unlikely that you will 'break' K1 but you could affect its performance by adding too many tables and inefficient data links. You could also affect its integrity by adding duplicate data fields so a normal level of professional care is required whenever changing the K1 data model.

At this point, if you are not familiar with how to modify the data model in K1 I suggest that you read the following topics in the K1 online help system.

- Making Changes to K1
- Making Changes via the DRM
- Making Changes via the User Interface

See following screen:



You should also review the white paper on our website on Modifying the K1 Data Model. It explains and summarizes all of the steps and methods involved.

<http://www.knowledgeonecorp.com/support/faq/pdfs/Modifying%20the%20Knowledgeone%20Data%20Model.pdf>

As I tell my customers when presenting K1, "The good news is that you are now empowered and can literally change anything in K1 without having to rely on the vendor. The bad news is that you are now empowered and can literally change anything in K1 without having to rely on the vendor."

Think about it.

Oh, and yes, Knowledgeone Corporation uses K1 as our HR system so we practice what we preach.

The Person Record

This is where you begin. All the people you will reference in K1 (including employees, customers and suppliers) should be added to the K1 Person table as Person records.

The difference between your employees and the employees of other organizations is that your employees have a link to a UserProfile record in K1. The employees of other organizations do not. This is because we need to maintain far more information on your employees and we do this by linking the Person record to the UserProfile record.

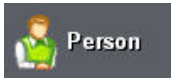
The UserProfile Record

Every employee must have both a Person record and a linked UserProfile record. The UserProfile record contains employee related information (such as employee number, Userid and Password) and well as links to other tables designed to hold employee specific information such as the Resume table.

Let's first look at how to use the standard Person record and UserProfile record from K1 to store all of the information you need to maintain on each employee.

Adding Employee Information To Knowledgeone ^{K1}

Person Table



Enter all basic information for each employee into a Person record (one for each employee).

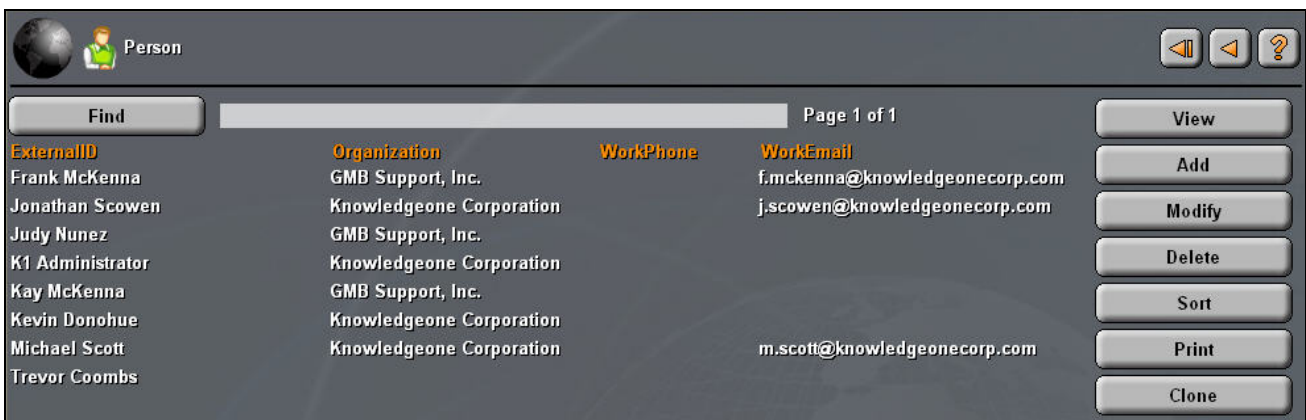
Select the Person table  from the K1 main screen.



Next click the  button.

Then click the  button.

Now you should be looking at a list of Person records (or a blank list if you have not yet added any Person records) similar to the following:

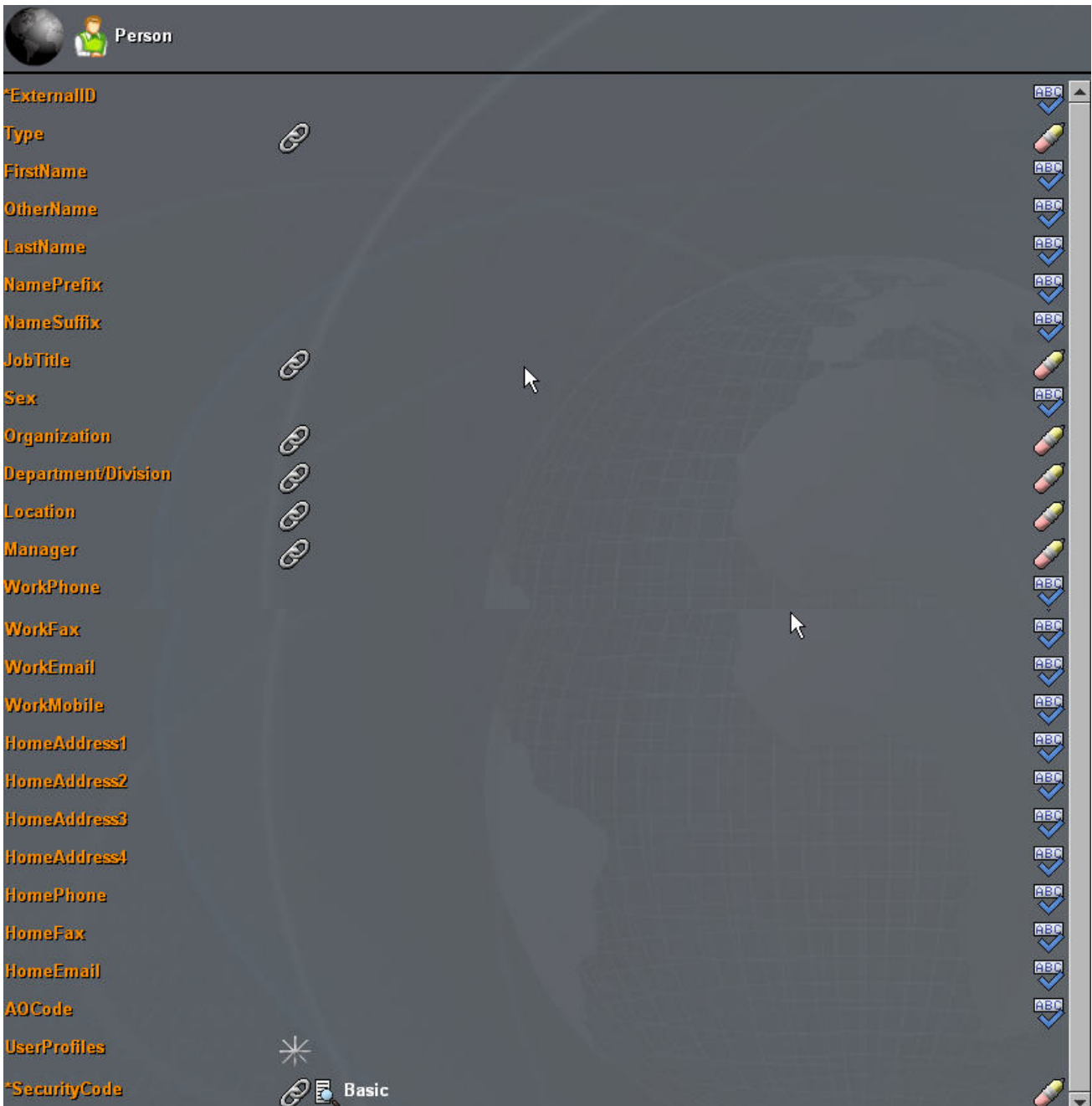


Remember with K1 that your systems administrator can change any aspect of the appearance of K1 including backgrounds, fonts, buttons and headings so your screen may appear very different from mine. The above screen is in fact part of the new look of K1 version 1.4.

Add

Please click the **Add** button to add your first employee record to the K1 Person table.

You should then see a screen that looks like the following:



The above set of fields (i.e., identified by captions such as **ExternalID** and **JobTitle**) represent the basic set of information we configured in K1 for each employee record.



Remember that using the DRM you can modify the K1 Data Model (no programming required!). You can modify the Person record and add, modify or delete fields, captions and headings and make fields visible or invisible. In other words, you can quickly and easily personalize the Person table (or any other K1 table) to your precise requirements. You are not 'stuck' with the fields and captions we have created in the out-of-the-box Personality just as you are not 'stuck' with the default fonts and colors.

Links



Where there is a link icon you have to select a linked record from another table. If the K1 system administrator has given you the rights, you can also add, modify and delete any record from the linked table 'on-the-fly'. This is one of the really powerful features of K1.

I will show you how to use one link (the Type Table) and then you can figure out how to use all the other because they all work exactly the same way (another great feature of K1).

Please click the link to the Type Table.



This takes you directly to the Type Table so you can select a Type record or add, modify or delete a Type record.

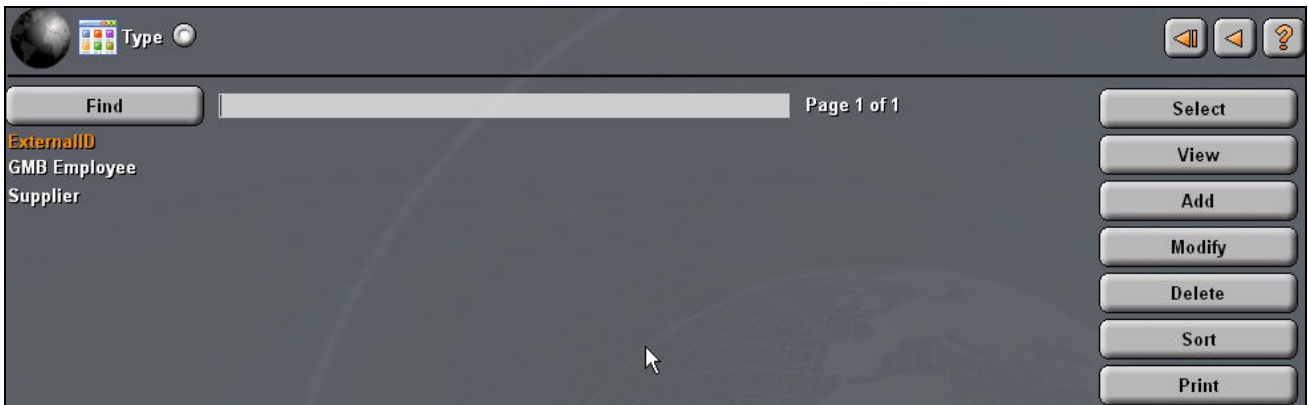


We use the Type table to differentiate different 'types' of a single record. For example, let's say we want to have three different types of Person record as follows:

1. Employee
2. Customer
3. Supplier

To do this we simply create three Type records for the Employee table in the Type table. Let's do this now.

After clicking on the Type link you should see a screen similar to the following:




In my example I have already created two Type records for the Person table, "GMB Employee" and "Supplier".

For this exercise I need to create two more, "Employee" and "Customer".


Click on the  button.

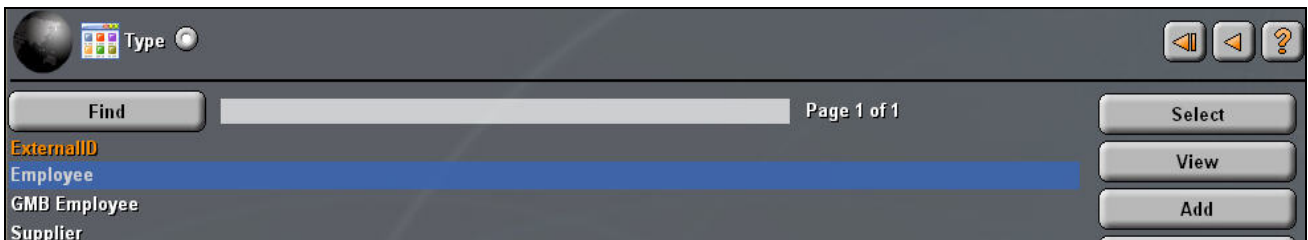
Enter information as follows and then click the  button to save the new record.



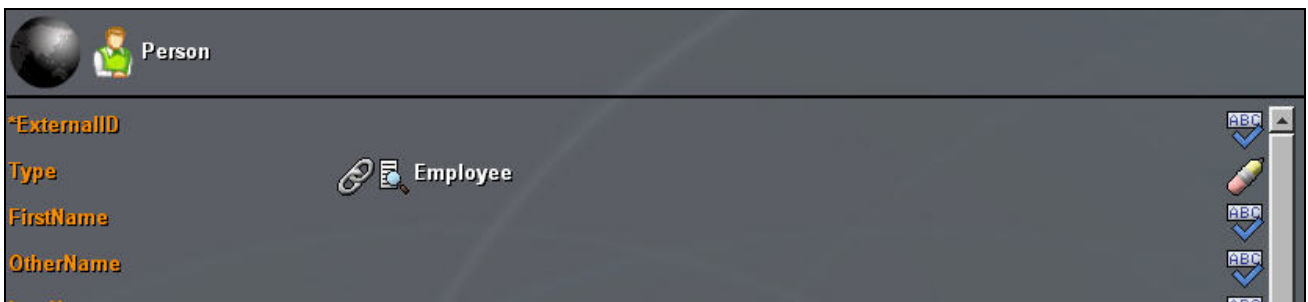
Now Click the  button again and add another Type record called "Customer".

As we are in the process of adding our employee records it is the "Employee" Type code that we wish to select.

Highlight the employee type code and click the  button.



K1 then returns you back to the employee record you have begun to add as follows:



Now all you have to do is enter or select (from linked tables) the information required for this employee. See my finished example, below.

Person

ExternalID Joe Smith

Type Employee

FirstName Joe

OtherName Edward

LastName Smith

NamePrefix Mr.

NameSuffix Esquire

JobTitle Accountant

Sex m

Organization Knowledgeone Corporation

Department/Division Corporate HQ

Location San Diego

Manager Frank McKenna

WorkPhone 9999-9999

WorkFax 7777-7777

WorkEmail joe.smith@k1corp.com

WorkMobile 6666-6666

HomeAddress1 45 Main Street

HomeAddress2

HomeAddress3 La Jolla

HomeAddress4 CA

HomePhone 5555-5555

HomeFax 4444-4444

HomeEmail JoeS@aol.com

AOCode

UserProfiles *

SecurityCode Basic




When you are finished click the  button to save the new Person record.



You need to first save the new Person record before you can add a link to a UserProfile record. Why? Because the UserProfile record needs to have the InternalID of the Person record as its "Foreign Key", linking it to the Person record. But, the new Person record doesn't get an InternalID assigned by K1 until it has been saved.



Now select the new created Person record and click the  button (see below) so we can add a link to a UserProfile record.

Person

Find Page 2 of 2

ExternalID	Organization	WorkPhone	WorkEmail
Joe Smith	Knowledgeone Corporation	9999-9999	joe.smith@k1corp.com
Jonathan Scowen	Knowledgeone Corporation		j.scowen@knowledgeonecorp.com
Judy Nunez	GMR Support, Inc.		

View
Add
Modify

The UserProfile Record

The UserProfile record is where we keep all employee-related information on each person who is also an employee.



Why Do We Separate This Information, Keeping Some In The Employee Record And Some In The UserProfile Record?

The K1 Data Model is relational. In a relational design we try to design tables in the most logical and efficient manner possible. This means thinking about the kind of 'objects' you will want to store in the database and making sure that there is a common or base record format (or 'class') for each logical object.

In this case, a person is a logical object whether or not that person is an employee or a supplier or a customer. All people, regardless of their classification, have a certain set of common attributes such as full name, first name, last name, etc. The K1 Person table has been designed to hold all the 'common' details (attributes) on people no matter their classification.

If a person is also an employee then we will need to maintain special information on this person (such as Userid, password, pay scale, etc.) that we do not need to maintain for people who are not employees. We therefore hold this 'non common' information in a separate and related table because it is not common to all classes of person.



After you have clicked the  button you will see a screen similar to the following:

The screenshot shows a web application interface for editing a 'Person' record. At the top left, there is a globe icon and a person icon next to the title 'Person'. Below this is a table of fields with their current values and edit icons (pencil and ABC) on the right side of each row:

*ExternalID	Joe Smith	ABC
Type	Employee	[Pencil]
FirstName	Joe	ABC
OtherName	Edward	ABC
LastName	Smith	ABC
NamePrefix	Mr.	ABC
NameSuffix	Esquire	ABC
JobTitle	Accountant	[Pencil]

Please scroll down to the UserProfile link and click it.



You should then see an empty UserProfile screen (as below) where you will now add a new UserProfile record for this employee.

The screenshot shows the 'User Profile' screen. At the top left, there is a globe icon and a person icon next to the title 'User Profile'. Below this is a search bar with the text 'Find' and a search icon. To the right of the search bar, it says 'Page 1 of 1'. On the right side of the screen, there are five buttons: 'View', 'Add', 'Modify', and 'Delete'. Below the search bar, there are three columns of text: 'ExternalID', 'Person', and 'EmployeeNumber'.



Please click the **Add** button.

This is where you enter and select the employee specific information on the person. See my example below.

User Profile


*ExternalID	Joe Smith	
Type		
*Person	Joe Smith	
EmployeeNumber	K00099	
Barcode	BC0099	
*UserID	joesmith	
*Password	
*SecurityGroup	Administrator	
*Background	Default Standard Background	
*Font	Arial, DarkOrange, 10, Bold	
HeadingFont	Arial, White, 10, Bold	
ButtonFont	Arial, White, 10, Bold	
*Language	English	
Citizenship	United States of America	
Qualifications	Business Degree	
Benefits		
JobTitle	Accountant	
JobRating	AA	
WhyLeft		
WorkingHoursStartTime	8:00:00 AM	
WorkingHoursEndTime	5:00:00 PM	
WorkingHoursPerWeek	40.00	
HolidaysPerWeek		
Holidays		
*DisplayTableList?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
*ReceiveSolicitations	<input type="radio"/> Yes <input checked="" type="radio"/> No	
LastSignOn		
LastSignOff		
*Administrator?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
JobHistories		
GEMAdministrator?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Resumes		
CaptureAdministrator?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
*Security Code	Basic	



What Have We Achieved?

We have created a new Person record for an employee and then we have created a new UserProfile record for this employee and have linked the UserProfile record to the Person record.

Now you can begin to better understand the K1 concept of each Personality being "single-table centric".

In our above example, I can stay in the Person table all day but I can see all related details (e.g., the UserProfile details) for any Person record just by clicking a link .

All K1 Personalities have been designed to work this way because it is the fastest and easiest way to manage complex data relationships. Anything you want to know is either on the screen in front of you or just a single click away.

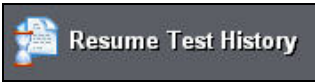


What About Other Information You Want To Maintain On Each Employee?

We have pre-configured a number of other tables in K1 in anticipation of this question. You can choose whether to use these or not and whether and when to link them to the UserProfile record (you build all links using the DRM).

The pre-configured tables we thought you may want to use for Human Resources management are as follows: (All of these tables with the exception of Holidays are already linked to the UserProfile record):





Let's just take one of these related tables, the Resume table, and show how it can be used to support your HR application.

The Resume Table



The Resume table is designed to hold all details of an employee's resume (curriculum vitae) including any electronic documents (i.e., the original covering letter and resume written in Word that he sent with his application for employment).



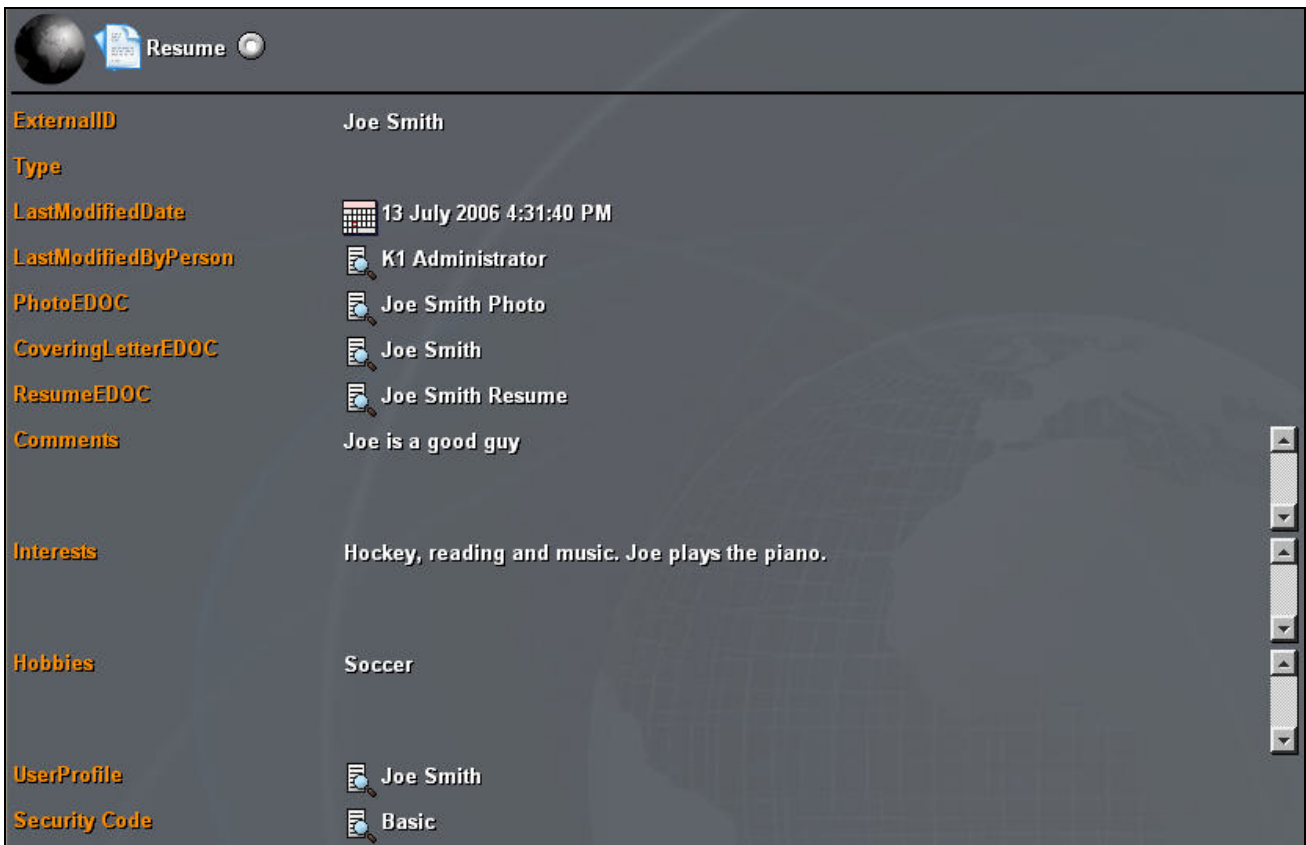
All electronic documents and images are stored as Blobs (Binary Large Objects) in K1's EDOC table. So, whether you capture a resume as a Word document or scan it in as a JPEG or TIFF image from a paper copy it will always be stored in the EDOC table.

The really good news is that K1 automatically indexes the full text of any electronic document stored in the EDOC table so you can find it using the full text search feature of the K1 Search by Metadata search as well as finding it by links from the employee's UserProfile record.

You can add or view a Resume record simply by clicking on the resume link in the UserProfile record.



My example follows:



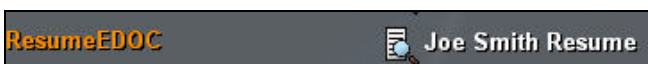
With one click I can access Joe's latest photo.



With one click I can access Joe's original covering letter.



And with another click I can access Joe's full written resume in Word format.



All of the above functionality is standard in K1. All of the above tables and fields and captions and links work straight 'out-of-the-box' because we have pre-configured K1 in anticipation of you using it as a Human Resources Management application. Or in our parlance, this is K1's HR Management Personality.

We are not claiming that this functionality will be a one hundred-percent fit for every organization. Au contraire, we expect you to want to modify and personalize this Personality and that is why we made it so easy to change K1. That after all is the whole rationale of a generic application solution like K1. "If you don't like it, please change it!"

Best Regards,

Frank McKenna CEO