

Administrator's User Manual for OrangeHRM Version 3.0



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1.0 Audience

This document is intended as a complete guide for using OrangeHRM 3.0. This document is specially designed for non-specialists; specialists may find the document a useful point of reference. By reading this guide, you will learn how to use OrangeHRM through the elements of the graphical user interface and what's behind some of the advanced features that are not always obvious at first sight. It will hopefully guide you around some common problems that frequently appear for users of OrangeHRM.

2.0 Supported Environment

2.1 Minimum Hardware Requirements

- Processor - Intel x86 Architecture 3GHz processor or equivalent
- RAM - 2 GB RAM
- Hard Disk - 40GB

***Note:** This configuration will support up to 100 users. If you have more users, this configuration may not be sufficient. Please contact support@orangehrm.com to get the optimized hardware requirements.

2.2 Software Requirements

- Operating System - Windows XP, Windows 7, Windows Server 2003, Windows Server 2008, Linux distributions such as Ubuntu, Fedora, Redhat.
- Apache Version - Apache 2.2
- MySQL Version - 5.1.36
- PHP Version - 5.3.5, 5.2.10-2Ubuntu6.4
- Browser - Internet Explorer 8, Firefox, Google Chrome, Safari
- ***Note:** JavaScript should be enabled in all the browsers
- Web Server Packages - XAMPP, WAMPP, LAMPP

***Note:** If PHP, MySQL & Apache are manually configured, web server packages are not required.

3.0 Installing OrangeHRM

Step 1: Install the environment for OrangeHRM

Install the environment for OrangeHRM (Apache, MySQL and PHP) using XAMPP/WAMPP. Download XAMPP for Windows at, <http://www.apachefriends.org/en/xampp-windows.html>



OR



Download WAMPP (recommended version - 2.0 and above) for Windows at <http://www.wampserver.com/en/download.php>.

***Note:** Alternatively you may download orangehrm one self-extracting installer for windows. This package automatically installs Apache, MySQL and PHP utilities which are required to run OrangeHRM.

Step 2: Download OrangeHRM

Please visit: <http://www.orangehrm.com/download.php> to download OrangeHRM Self-extracting Installer.

Provided that both Apache and MySQL are running, you can access OrangeHRM via your web browser.

Step 3: Installation Process

Once the download is complete, go to the destination folder where OrangeHRM was downloaded in your PC.

Copy the OrangeHRM folder & paste the OrangeHRM folder in the **htdocs** folder (**My Computer**>>**Local Disk (*)**>>**xampp**>>**htdocs**).

If you have installed **WAMPP**, paste the OrangeHRM folder in the **www** folder.

***Note:** If you are a **Linux** user, first change the file permission of OrangeHRM. Open the terminal (console) and navigate to your orangehrm directory (which is in the www folder or htdocs folder) and run the below command: **sudo chmod -R 777 <orangehrm>**

```
www$ sudo chmod -R 777 orangehrm
```

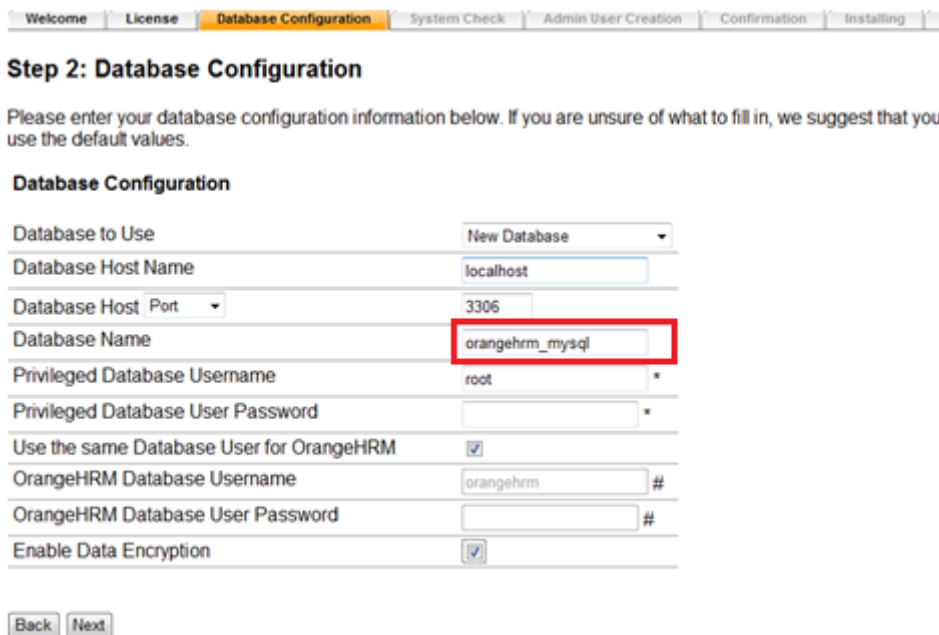
Copy and paste the name of the OrangeHRM version that you have downloaded in the following URL:

<http://localhost/orangehrm>

OR

Type the IP address of your PC instead of the localhost.
Click **“Next”** to begin the OrangeHRM installation.
Step 4: Click **“I accept”** to agree and proceed with the installation.

Configure your database by entering a preferred Database Host Name. (All the data that is populated into the system later will be stored under this Database Host Name).



Step 2: Database Configuration

Please enter your database configuration information below. If you are unsure of what to fill in, we suggest that you use the default values.

Database Configuration

Database to Use	New Database
Database Host Name	localhost
Database Host Port	3306
Database Name	orangehrm_mysql
Privileged Database Username	root
Privileged Database User Password	
Use the same Database User for OrangeHRM	<input checked="" type="checkbox"/>
OrangeHRM Database Username	orangehrm
OrangeHRM Database User Password	
Enable Data Encryption	<input checked="" type="checkbox"/>

Select the two checkboxes based on your requirements. Click **“Next”** to proceed.

The System will check for minimum system requirements to install OrangeHRM in your PC. Once the system check is complete, click **“Next”**.

Step 3: System Check

In order for your OrangeHRM installation to function properly, please ensure that all of the system check items listed below are green. If any are red, please take the necessary steps to fix them.

Component	Status
PHP version	OK (ver 5.3.5)
MySQL Client	ver 4.1.x or later recommended (reported ver mysqlnd 5.0.7-dev - 091210 - \$Revision: 304625 \$)
MySQL Server	OK (ver 5.5.8)
MySQL InnoDB Support	Default
Write Permissions for "lib/configs"	OK
Write Permissions for "lib/logs"	OK
Write Permissions for "symfony/apps/orangehrm/config"	OK
Write Permissions for "symfony/cache"	OK
Write Permissions for "symfony/log"	OK
Maximum Session Idle Time before Timeout	OK
Register Globals turned-off	OK
Memory allocated for PHP script	OK
Web server allows .htaccess files	OK

[Back](#) [Re-check](#) [Next](#)

OrangeHRM Web Installation Wizard ver 0.2 © OrangeHRM Inc 2005 - 2011 All rights reserved.

You can create an administrator account to login to the system by entering the preferred Username and Password.

Step 4: Admin User Creation

After OrangeHRM is configured you will need an Administrator Account to Login into Please fill in the Username and User Password for the Administrator login.

Admin User Creation

OrangeHRM Admin Username	<input type="text" value="Admin"/>
OrangeHRM Admin User Password	<input type="password" value="•••••"/>
Confirm OrangeHRM Admin User Password	<input type="password" value="•••••"/>

[Back](#) [Next](#)

OrangeHRM Web Installation Wizard ver 0.2 © OrangeHRM Inc 2005 - 2011 All rights reserved.

Once the installation is complete, click **“Next”**.

Once you have successfully installed OrangeHRM, register yourself to receive additional support and services from OrangeHRM.

Step 3: Login to the OrangeHRM System

Login to the OrangeHRM system by using the Administrator account that you created during the installation process.

4.0 The System

Log-in to the OrangeHRM System using the Administrator account that you created.



Figure 1.0: Login Panel

5.0 Admin Module

The Admin Module provides you with full control of all settings that affect the action of your OrangeHRM implementation. Through the Admin Module, you can:

- Define the company hierarchy, pay grades, work shifts, projects, memberships, qualifications etc.
- Add other administrators, and set access levels for each user
- Handle security issues
- Configure email notifications
- Configure language localization and date format that will be reflected throughout the whole system.
- Enable/Disable Module display

The Admin Module is the central control of the system and setting it up accurately is important for smooth operation.



Figure 1.1: Admin Module

The Admin Module consists of:

User Management: Add multiple HR Admins who will control the system, create logins for general users through ESS Users.

Job: Allows the HR admin to define job titles, specifications, pay grades, employment status, job categories and work shifts.

Organization: Allows the HR admin to enter/store general company info, structure of the organization and locations of sites.

Qualifications: Define various skills set, education background, license types, languages and memberships.

Nationalities: Define different nationalities

Configuration: Configure all email notifications, language localization and enable/disable module display.

5.1 User Management

This feature allows the HR Admin to administer users by creating logins and defining privileges by assigning User Types (Admin or ESS).

To add a system user, go to **Admin>> User Management>> Users** and click “Add”, a screen as shown in Figure 1.2 would appear.

Click “Save” once the fields are added.

***Note:** An employee list needs to be created first under the PIM Module to create user logins. Alternatively, a user login could be created when adding employees under the PIM Module (*refer to Chapter 6.3.*)

To create a user login the following needs to be entered:

- **User Role:** You can assign user roles for each user whether they would fall under as an “Admin” or “ESS” user type to define their user rights.
 - **Admin:** have access full access to the system.
 - **ESS:** limited access to the system. It could be an ESS-Supervisor or ESS-Employee.
 1. **ESS-Supervisor:** where the user has access to his/her particulars and his/her subordinates’ particulars.
 2. **ESS-Employee:** where the user has access only to his/her particulars.
- **Employee Name**
*If an HR Admin is an existing employee, he/she needs to be defined in the PIM Module
- **Username**
- **Status** – Enabled or disabled
- **Password**
- **Confirm Password** (Re-enter the password)

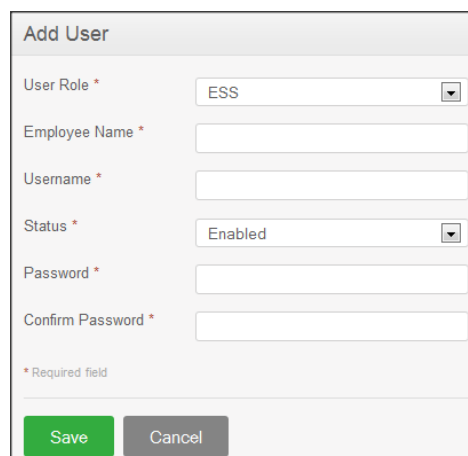
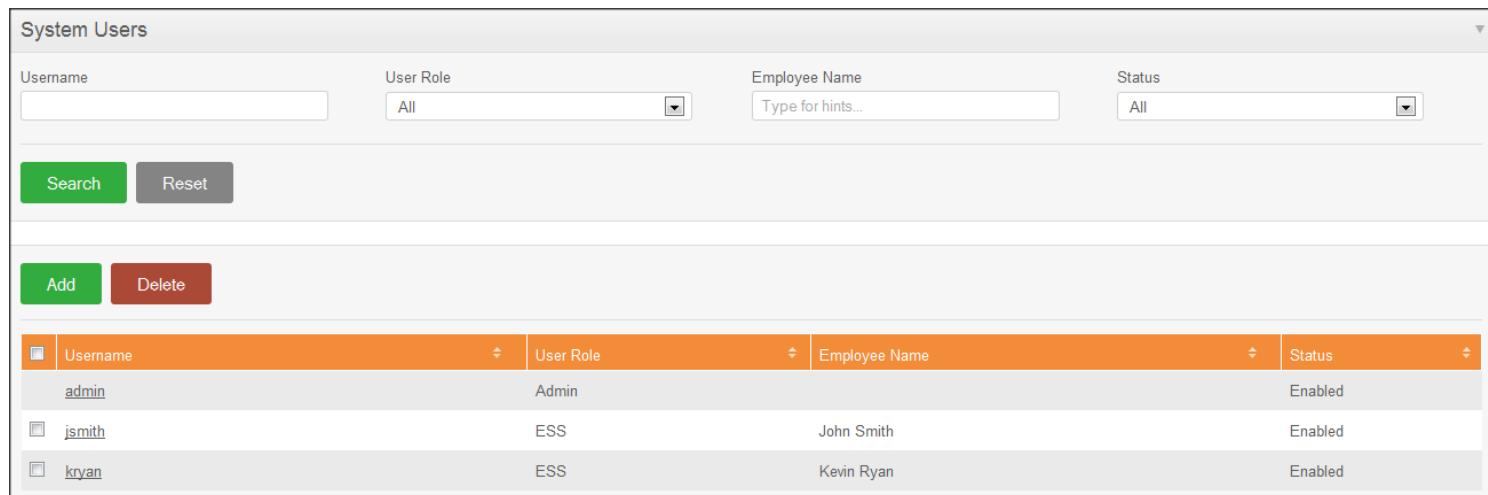


Figure 1.2: Add User

A list of user logins as shown in Figure 1.3 would appear once an entry is added. You may also add multiple entries of user logins. The default system user available will be Admin and has full access to the system.

***Note:** System User Logins need to be communicated manually to employees.



The screenshot shows the 'System Users' interface. At the top, there is a search form with four fields: 'Username' (text input), 'User Role' (dropdown menu with 'All' selected), 'Employee Name' (text input with placeholder 'Type for hints...'), and 'Status' (dropdown menu with 'All' selected). Below the search form are 'Search' and 'Reset' buttons. Underneath are 'Add' and 'Delete' buttons. The main area contains a table with the following data:

<input type="checkbox"/>	Username	User Role	Employee Name	Status
<input type="checkbox"/>	admin	Admin		Enabled
<input type="checkbox"/>	jsmith	ESS	John Smith	Enabled
<input type="checkbox"/>	kryan	ESS	Kevin Ryan	Enabled

Figure 1.3: System Users List

To delete a system user, click on the check box next to the “Username”. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

5.2 Job

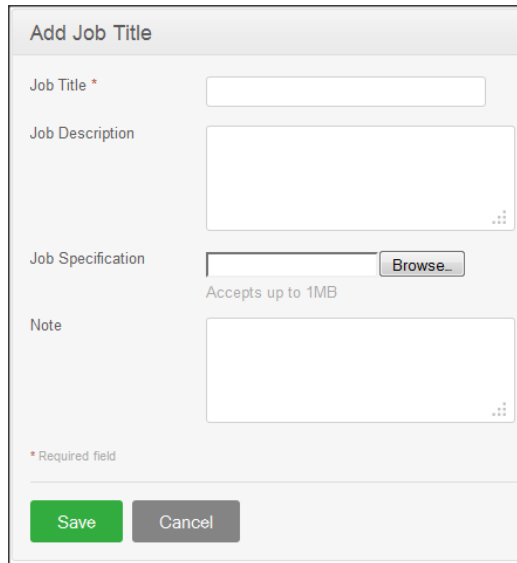
All job related information can be defined in this feature. The sub menu consists of the following items:

- Job Titles
- Pay Grades
- Employment Status
- Job Categories
- Work Shifts

Job Titles

The job titles specific to the company can be defined in this option. To add an entry, go to **Admin>> Job>> Job Titles** and click “Add”. A screen as shown in Figure 1.4 would appear.

Click “Save” once the fields are added.

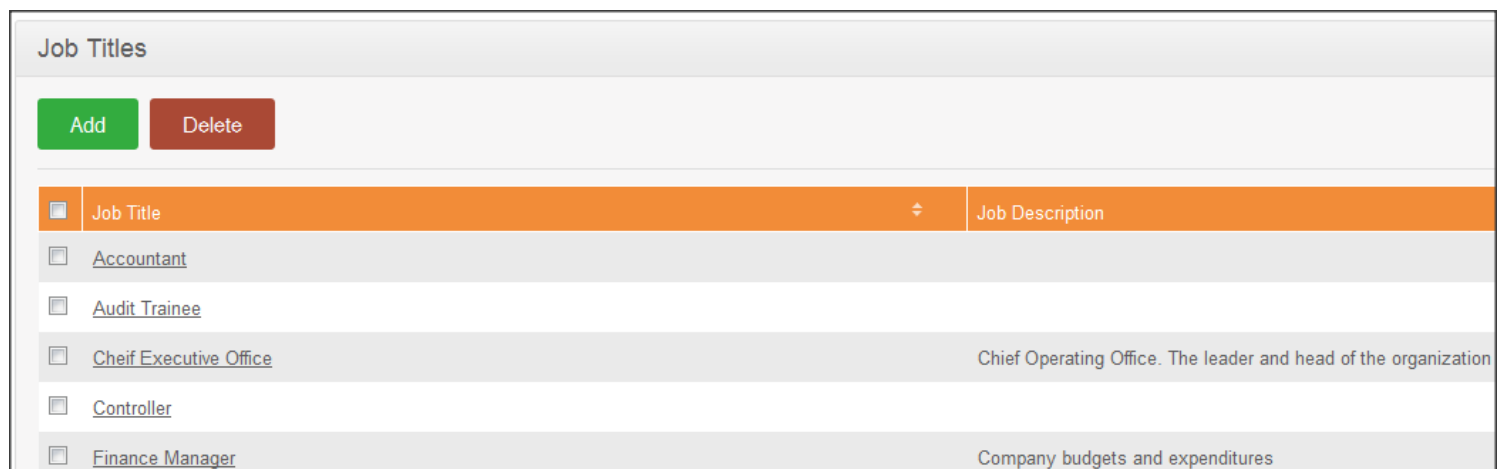


The form titled "Add Job Title" contains the following fields and controls:

- Job Title ***: A required text input field.
- Job Description**: A large text area with a "..." icon at the bottom right.
- Job Specification**: A text input field with a "Browse..." button to its right. Below it, it says "Accepts up to 1MB".
- Note**: A large text area with a "..." icon at the bottom right.
- * Required field**: A small note at the bottom left.
- Save**: A green button at the bottom left.
- Cancel**: A grey button at the bottom right.

Figure 1.4: Add Job Title

A list of job title(s) will appear as shown in Figure 1.5. You may also enter multiple job titles. You may view Job Title details by clicking on the name of the "Job Title".



Job Titles	
<input type="button" value="Add"/>	<input type="button" value="Delete"/>
<input type="checkbox"/> Job Title	Job Description
<input type="checkbox"/> Accountant	
<input type="checkbox"/> Audit Trainee	
<input type="checkbox"/> Cheif Executive Office	Chief Operating Office. The leader and head of the organization
<input type="checkbox"/> Controller	
<input type="checkbox"/> Finance Manager	Company budgets and expenditures

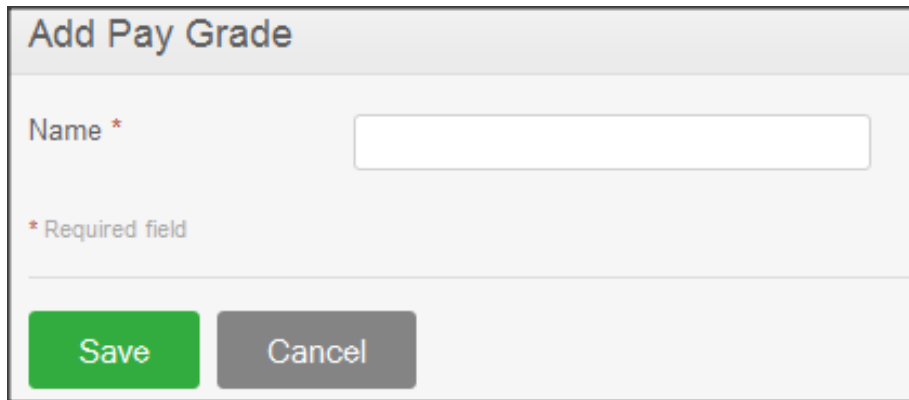
Figure 1.5: Job Title List

To delete a Job Title click on the check box next to the Job Title name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete".

Pay Grade

The HR Admin can define the pay grade by setting a minimum salary, maximum salary, step increase, and the currency to be paid in. To add an entry, go to **Admin>>Job>> Pay Grades** and click "Add" and a screen as shown in Figure 1.6 would appear.

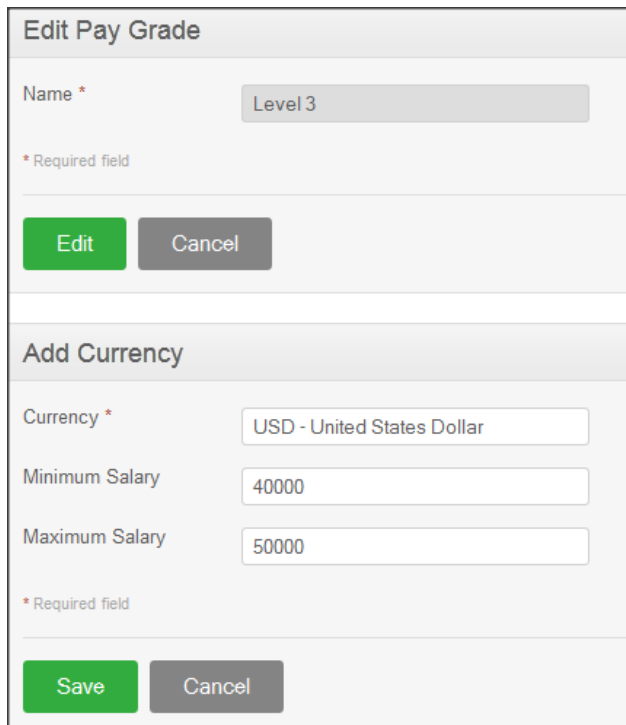
Click "Save" once the field is added.



The 'Add Pay Grade' form features a title bar at the top. Below it is a text input field labeled 'Name *'. A small asterisk and the text '* Required field' are positioned below the input field. At the bottom of the form, there are two buttons: a green 'Save' button and a grey 'Cancel' button.

Figure 1.6: Add Pay Grade

Once you click “Save” the screen in Figure 1.7 would appear and you can now define the currency and the minimum/maximum salary for each pay grade created. You can define the pay grade by clicking “Add” under “Assigned Currencies” and then providing the pay details under “Add Currency”. Click “Save” to save the currency for the Pay Grade.



The 'Edit Pay Grade' form is divided into two sections. The top section, titled 'Edit Pay Grade', contains a text input field with the value 'Level 3' and the label 'Name *'. Below this is the text '* Required field'. At the bottom of this section are 'Edit' and 'Cancel' buttons. The bottom section, titled 'Add Currency', contains three text input fields: 'Currency *' with the value 'USD - United States Dollar', 'Minimum Salary' with the value '40000', and 'Maximum Salary' with the value '50000'. Below these fields is the text '* Required field'. At the bottom of the form are 'Save' and 'Cancel' buttons.

Figure 1.7: Assign Pay Grade

You can assign multiple currencies here and each currency defined will be listed as shown in Figure 1.8.

Edit Pay Grade

Name *

* Required field

Assigned Currencies

<input type="checkbox"/> Currency	Minimum Salary	Maximum Salary
<input type="checkbox"/> United States Dollar	40,000.00	50,000.00
<input type="checkbox"/> Utd. Arab Emir. Dirham	100,000.00	110,000.00

Figure 1.8: Pay Grade- Currency List

You can edit details of a particular currency by clicking on the “Currency” name.

All pay grades added will be listed as shown in figure in 1.9. To view Pay Grade details click on “Pay Grade name.

Pay Grades

<input type="checkbox"/> Pay Grade	Currency
<input type="checkbox"/> Level 1	United States Dollar,Utd. Arab Emir. Dirham
<input type="checkbox"/> Level 2	United States Dollar

Figure 1.9: Pay Grades List

To delete a Pay Grade click on the check box next to the “Pay Grade” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Employment Status

Employment Status allows you to define the status of employment employees are hired for or if they are terminated. To add an entry, go to **Admin>> Job>> Employment Status** and click “Add” and a screen as shown in Figure 2.0 would appear.

Click “Save” once the field is added.

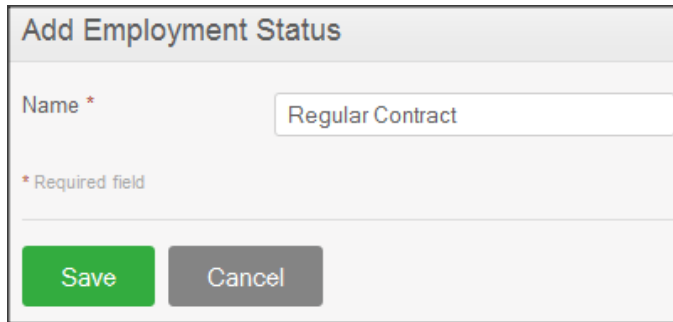


Figure 2.0: Add Employment Status

A list of Employment Status as shown in Figure 2.1 would appear once an Employment Status is added. To edit an employment status, click on the “Employment Status” name.

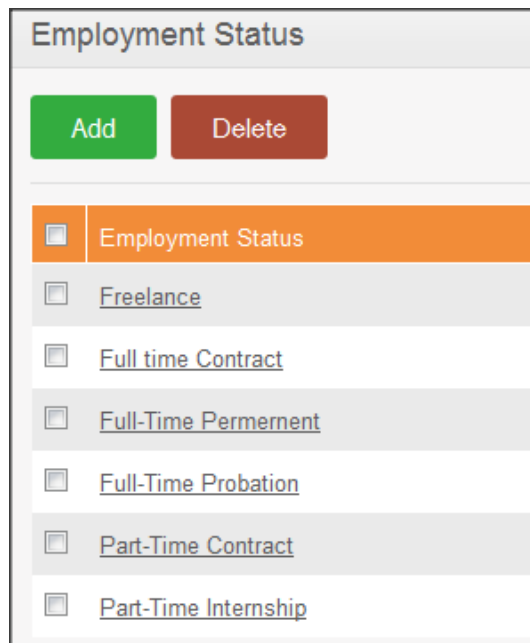


Figure 2.1: Employment Status List

To delete an Employment Status click on the check box next to the “Employment Status” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Job Categories

This feature allows the HR Admin to create job categories specific to the company to aggregate job classifications.

To add an entry, go to **Admin>> Job>> Job Categories** and click on “Add” and a screen as shown in Figure 2.2 would appear.

Click “Save” once the field is added.

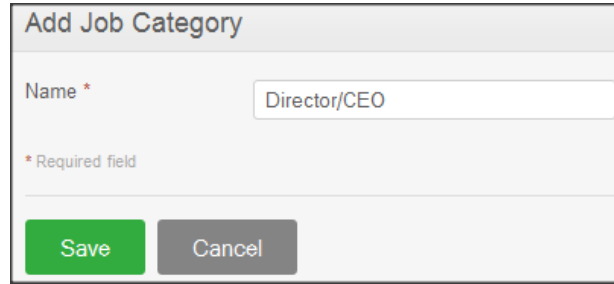


Figure 2.2: Add Job Category

A list of Job Category as shown in Figure 2.3 would appear once a “Job Category” is added. To view Job Category details, click on “Job Category” name. You may also add multiple entries of Job Categories.

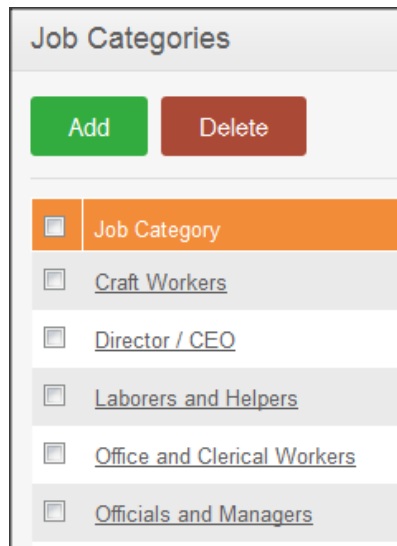


Figure 2.3: Job Category List

To delete a Job Category click on the check box next to the “Job Category” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Work Shifts

In this feature the HR Admin can define work shifts for an individual or a group of employees. To add an entry, go to **Admin>> Job>> Work Shifts** and click “Add” and a screen as shown in Figure 2.4 would appear.

Click “Save” once the fields are added.

You may assign employees to the particular shift by selecting the employee’s name from the “Available Employees” box and “Add” him/her to the “Assigned Employees” box.

***Note:** An Employee list needs to be created first under the PIM Module before assigning employees to a particular work shift.

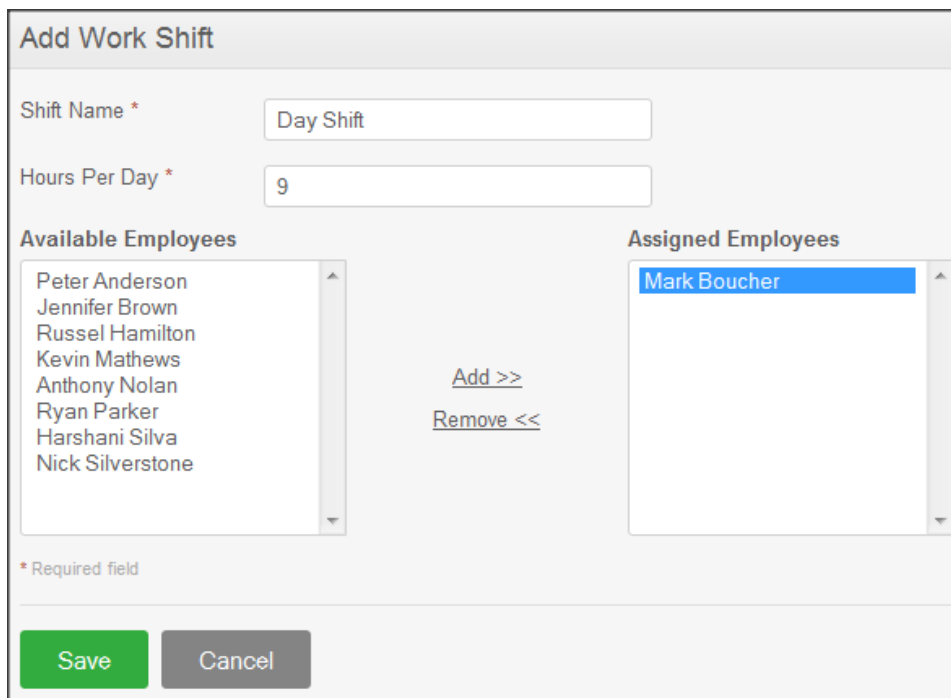
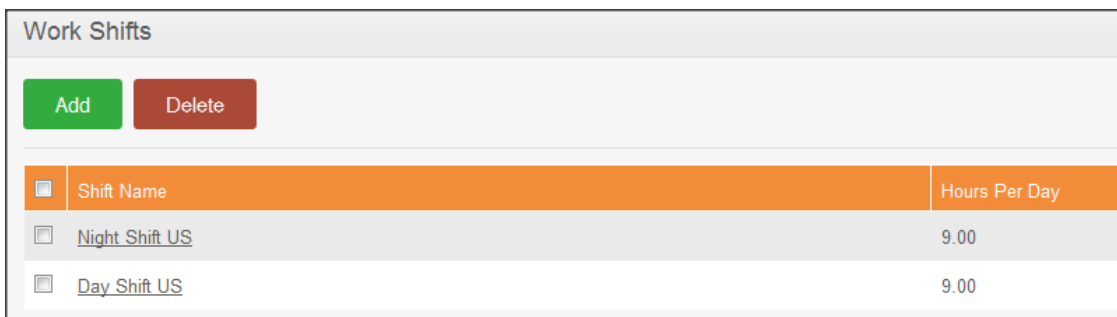


Figure 2.4: Add Work Shift

A list of work shifts as shown in Figure 2.5 would appear once a “Work Shift” is added. To view Work Shift details, click on “Work Shift” name. You may also add multiple entries of work shifts.



<input type="checkbox"/>	Shift Name	Hours Per Day
<input type="checkbox"/>	Night Shift US	9.00
<input type="checkbox"/>	Day Shift US	9.00

Figure 2.5: Work Shifts List

To delete a work shift click on the check box next to the “Work Shift” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

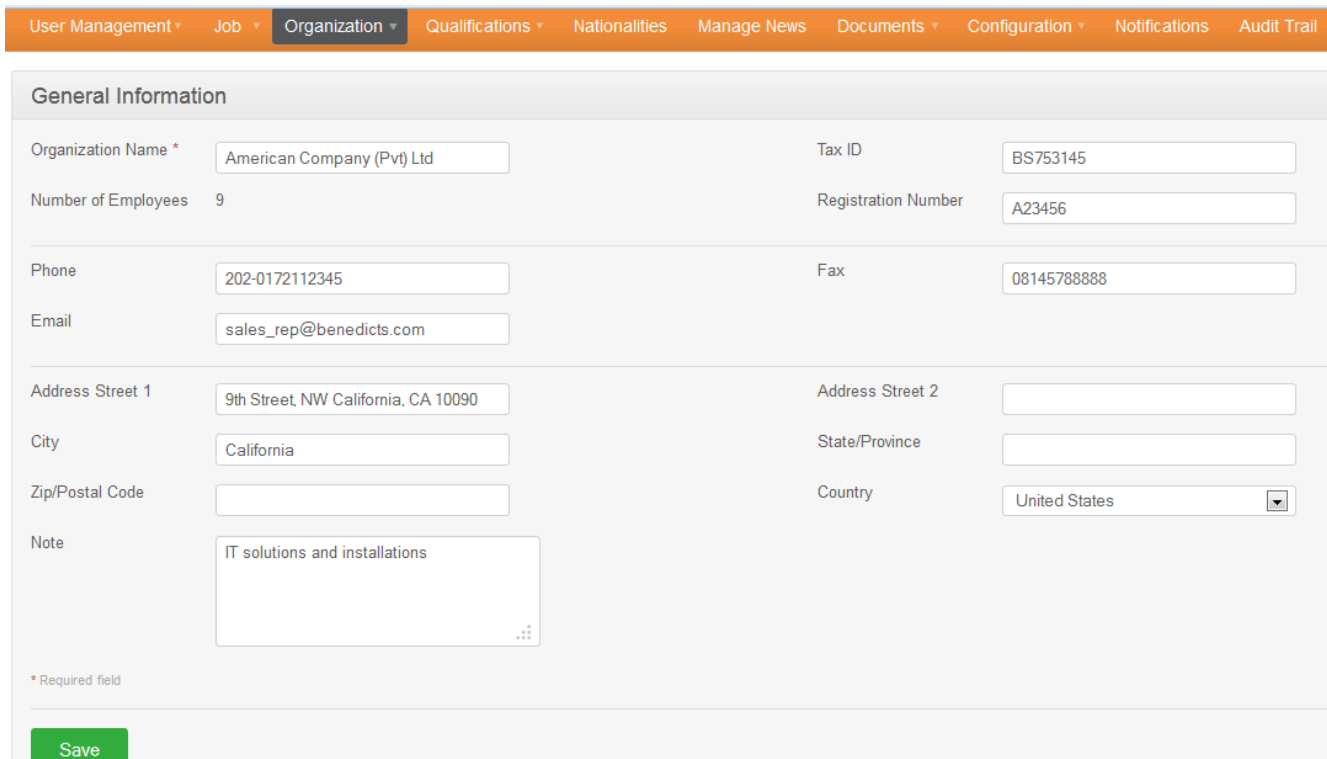
5.3 Organization

All information about the organization, the structure and locations are defined here.

General Information

Basic details of the company can be entered on this screen. To start adding information, go to **Admin>>Organization>>General Information** and click “Edit”.

Click “Save” once fields are entered as shown in Figure 2.6.



General Information	
Organization Name *	American Company (Pvt) Ltd
Number of Employees	9
Phone	202-0172112345
Email	sales_rep@benedicts.com
Address Street 1	9th Street, NW California, CA 10090
City	California
Zip/Postal Code	
Note	IT solutions and installations
Tax ID	BS753145
Registration Number	A23456
Fax	08145788888
Address Street 2	
State/Province	
Country	United States

* Required field

Save

Figure 2.6: General Information

Locations

Under Locations, the HR admin can add details of sites and branches of the company. You are also able to track the number of employees working for a particular location once employees are tagged to the locations when building up the PIM Module.

To add a location go to **Admin>>Organization>>Location** and click “Add” and the screen as shown in Figure 2.7 would appear.

Click “Save” once the fields are added.

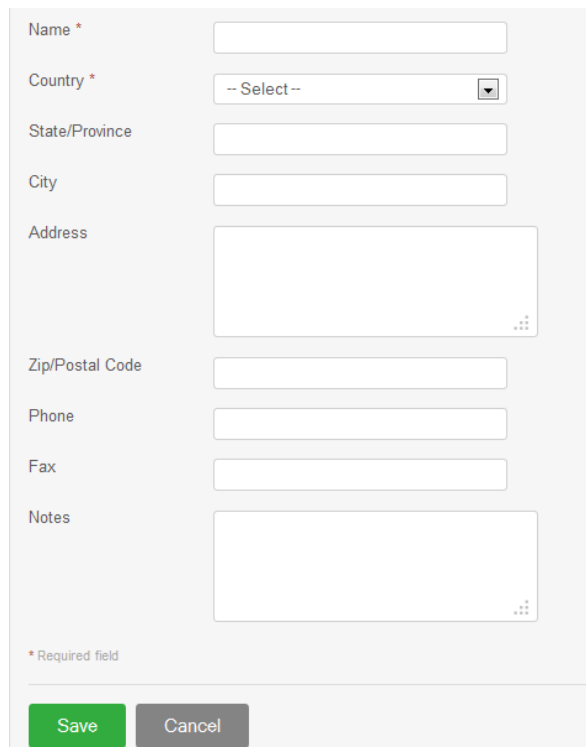


Figure 2.7: Add Location

Once a location is added, it will be listed as shown in Figure 2.8. You may also enter multiple locations. You may view location details by clicking on “Location Name”.



<input type="checkbox"/>	Name	City	Country	Phone	Number of Employees
<input type="checkbox"/>	HQ	California	United States	23156234757	10
<input type="checkbox"/>	London	London	United Kingdom	442011134545	0

Figure 2.8: Location List

To delete a location click on the check box next to the location name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Structure

This feature allows the admin to define the hierarchy of the company by defining sub units. Since the parent company is already defined in the General Information, it would automatically appear in the Company Structure screen.

***Note:** You need to define the company name of the parent company before you create the Company Structure.

To add a sub- unit to the company structure, go to **Admin>> Organization>> Structure** and click on [+] as shown in Figure 2.9 and the screen shown in Figure 3.0 would appear.



Figure 2.9: Add Sub-Unit

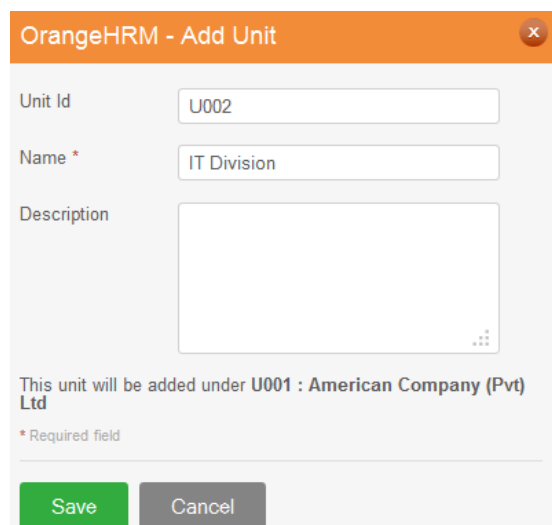
A screenshot of the 'OrangeHRM - Add Unit' dialog box. It contains the following fields: 'Unit Id' with the value 'U002', 'Name *' with the value 'IT Division', and a large empty 'Description' text area. Below the fields, it states 'This unit will be added under U001 : American Company (Pvt) Ltd'. At the bottom, there are 'Save' and 'Cancel' buttons. A legend indicates '* Required field'.

Figure 3.0: Sub-Unit Details

***Note:** Company Structure may be defined according to the company’s specifications and hierarchy. When entering the fields, you need to specify if the sub-unit is a Department, Division or Team.

Once you have entered the field, click “Save” and the Sub-Unit will appear as shown in Figure 3.1.

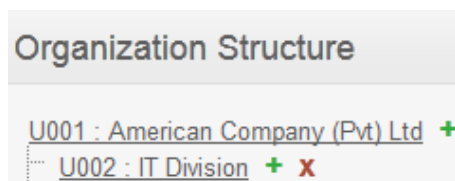


Figure 3.1: Sub-Unit Structure

You may also add further sub-units by clicking [+] option next to the relevant fields to indicate the hierarchy levels of the company and create a pyramidal structure of your organization as shown in Figure 3.2.



Figure 3.2: Company Structure Hierarchy

To delete an entry, you can simply click “[x]” next to the relevant sub units. Click “Done” below the screen to save the information. You can also collapse/expand the sub-units by clicking on the (-) and (+) on the right hand side of the sub-units to further view the company structure hierarchy.

5.4 Qualifications

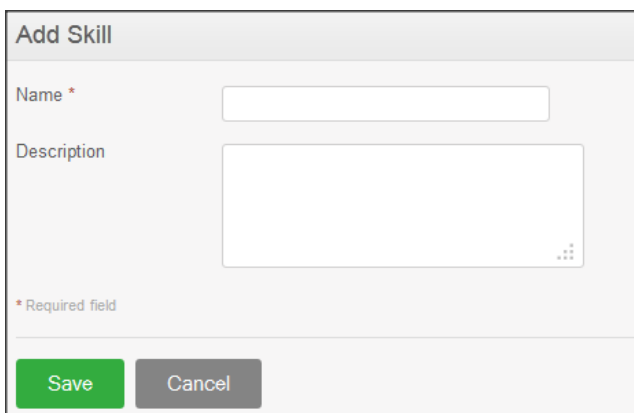
This feature allows you to define all information with regards to employees’ qualifications. The sub-menu consists of:

- Skills
- Education
- Licenses
- Languages

Skills

You can define various sets of skills which can be later used on the PIM Module. To add an entry go to **Admin>> Qualifications>> Skills** and click “Add” and a screen as shown in Figure 3.3 would appear.

Click “Save” once the fields are added.

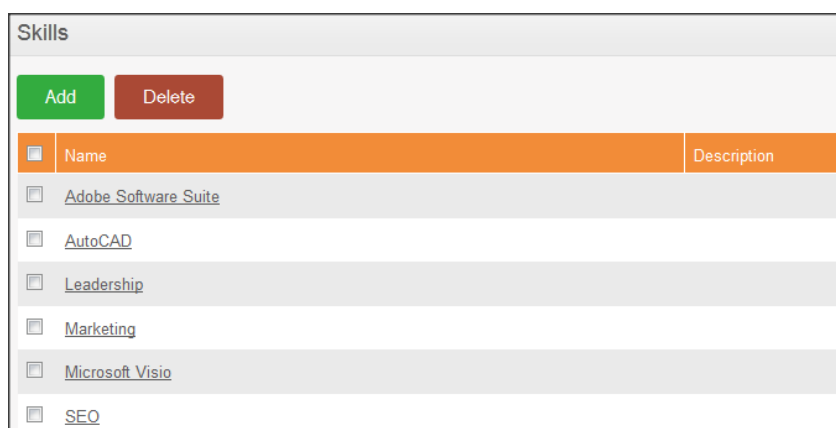


The 'Add Skill' form contains the following elements:

- Title:** Add Skill
- Name *:** A text input field with an asterisk indicating it is required.
- Description:** A larger text area for entering details.
- Footer:** A green 'Save' button and a grey 'Cancel' button.
- Legend:** A small asterisk icon next to the text '* Required field'.

Figure 3.3: Add Skill

A list of skill(s) as shown in Figure 3.4 would appear once a “Skill” is added. You may also add multiple entries of skills.



The 'Skills List' interface includes:

- Buttons:** 'Add' (green) and 'Delete' (red).
- Table:** A table with columns for 'Name' and 'Description'. Each row has a checkbox on the left.

<input type="checkbox"/>	Name	Description
<input type="checkbox"/>	Adobe Software Suite	
<input type="checkbox"/>	AutoCAD	
<input type="checkbox"/>	Leadership	
<input type="checkbox"/>	Marketing	
<input type="checkbox"/>	Microsoft Visio	
<input type="checkbox"/>	SEO	

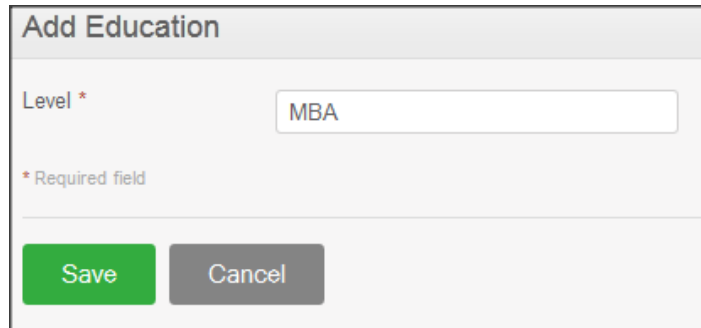
Figure 3.4: Skills List

To delete a skill click on the check box next to the “skill” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Education

You can define various types of educational qualifications which can be later used in the PIM Module. To add an entry select **Admin>> Qualifications>> Education** and click “Add”, a screen as shown in Figure 3.5 would appear.

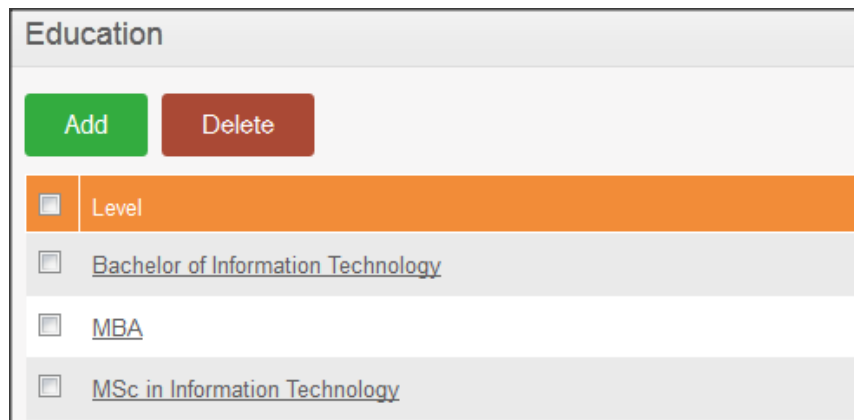
Click “Save” once the field is added.



The 'Add Education' form features a title bar at the top. Below it, there is a 'Level *' label followed by a text input field containing 'MBA'. A red asterisk and the text '* Required field' are positioned below the input field. At the bottom of the form, there are two buttons: a green 'Save' button and a grey 'Cancel' button.

Figure 3.5: Add Education

A list of education as shown in Figure 3.6 would appear once an “Education” entry is added. You may also add multiple entries of skills.



The 'Education List' interface includes a title bar and two buttons: a green 'Add' button and a red 'Delete' button. Below these buttons is a table with four rows. The first row is highlighted in orange and contains a checkbox and the text 'Level'. The second row contains a checkbox and the text 'Bachelor of Information Technology'. The third row contains a checkbox and the text 'MBA'. The fourth row contains a checkbox and the text 'MSc in Information Technology'.

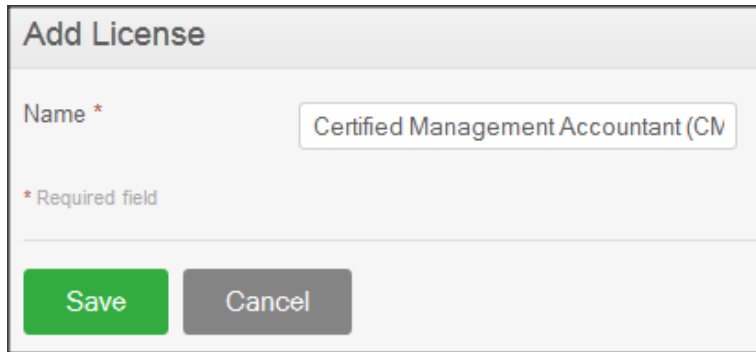
Figure 3.6: Education List

To delete education type click on the check box next to the “Education” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Licenses

You can define various types of licenses which can be later used in the PIM Module. To add an entry go to **Admin>> Qualifications>> Licenses** and click “Add”, a screen as shown in Figure 3.7 would appear.

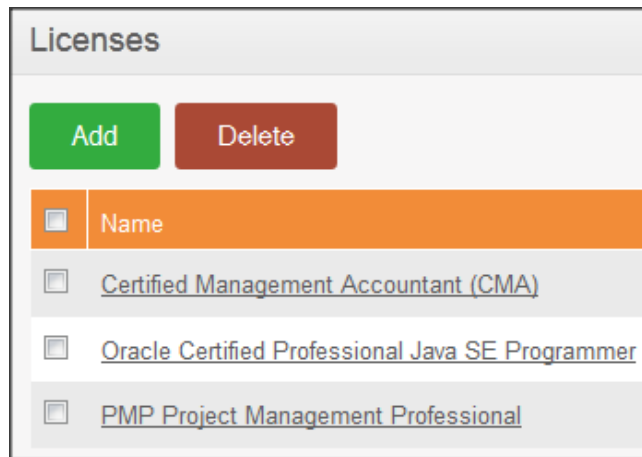
Click “Save” once the field is added.



The image shows a web form titled "Add License". It has a single text input field labeled "Name *" with the text "Certified Management Accountant (CMA)" entered. Below the input field is a small asterisk and the text "* Required field". At the bottom of the form are two buttons: a green "Save" button and a grey "Cancel" button.

Figure 3.7: Add License Type

A list of license type(s) as shown in Figure 3.8 would appear once a "License" type is added. You may also add multiple entries of licenses.



The image shows a table titled "Licenses". At the top of the table are two buttons: a green "Add" button and a red "Delete" button. The table has a header row with a checkbox and the text "Name". Below the header are three rows, each with a checkbox and a license name: "Certified Management Accountant (CMA)", "Oracle Certified Professional Java SE Programmer", and "PMP Project Management Professional".

<input type="checkbox"/>	Name
<input type="checkbox"/>	Certified Management Accountant (CMA)
<input type="checkbox"/>	Oracle Certified Professional Java SE Programmer
<input type="checkbox"/>	PMP Project Management Professional

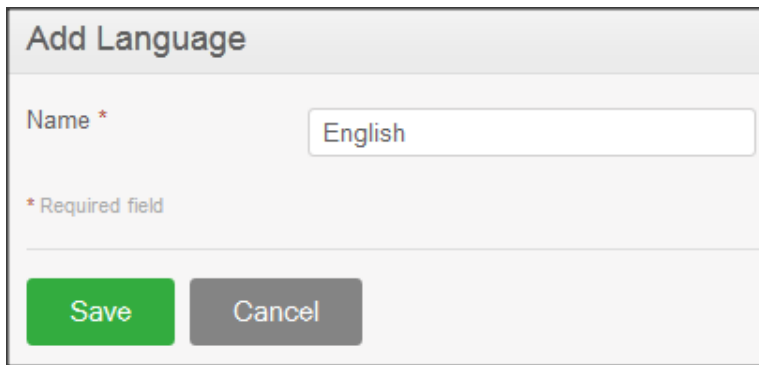
Figure 3.8: Licenses List

To delete a license type click on the check box next to the "License" name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete".

Languages

Different types of languages that employees in your company speak can be defined here and can be used in The PIM Module later. To add an entry, go to **Admin>> Qualifications>> Languages** and click "Add", a screen as shown in Figure 3.9 would appear.

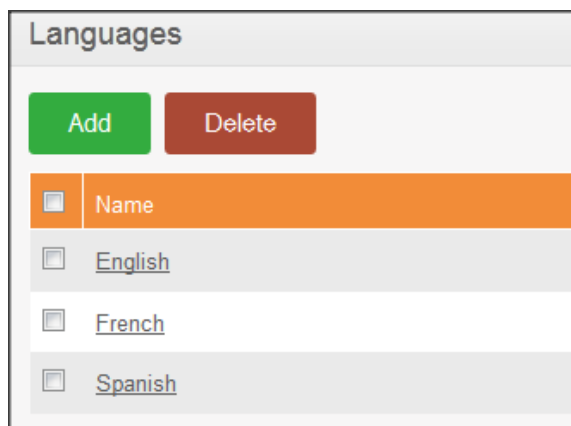
Click "Save" once the field is added.



The image shows a web form titled "Add Language". It has a single text input field labeled "Name *" with the word "English" entered. Below the input field, there is a note "* Required field". At the bottom of the form, there are two buttons: a green "Save" button and a grey "Cancel" button.

Figure 3.9: Add Language

A list of languages as shown in Figure 4.0 would appear once a “Language” type is added. You may also add multiple entries of languages.



The image shows a web interface titled "Languages". At the top, there are two buttons: a green "Add" button and a red "Delete" button. Below these buttons is a table with a header row and three data rows. Each row has a checkbox on the left and a language name on the right.

<input type="checkbox"/>	Name
<input type="checkbox"/>	English
<input type="checkbox"/>	French
<input type="checkbox"/>	Spanish

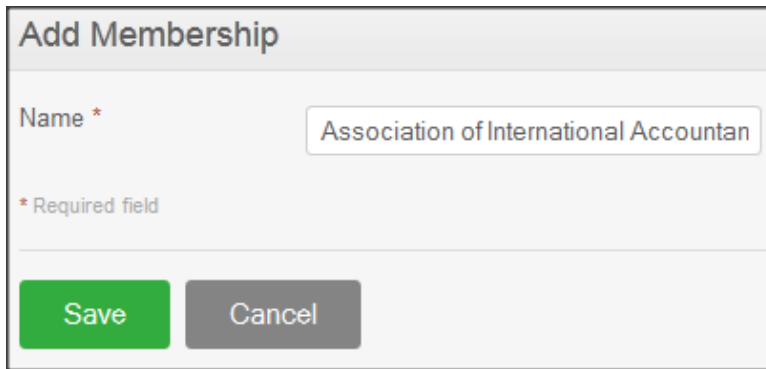
Figure 4.0: Language List

To delete language types click on the check box next to the “Language” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Memberships

This feature allows the HR Admin to define different membership details of the employees which can be later used in the PIM Module. To add a membership, go to **Admin>> Qualifications>> Membership** and click “Add”, a screen as shown in Figure 4.1 would appear.

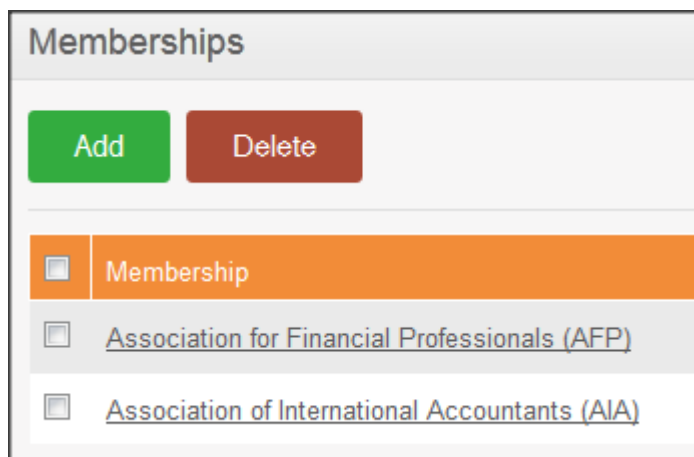
Click “Save” once the field is added.



The form is titled "Add Membership". It features a text input field labeled "Name *" with the value "Association of International Accountan". Below the input field is a note "* Required field". At the bottom of the form are two buttons: a green "Save" button and a grey "Cancel" button.

Figure 4.1: Add Membership

A list of membership(s) as shown in Figure 4.2 would appear once a “Membership” is added. To view membership details, click on “Membership” name. You may also add multiple entries of memberships.



The interface is titled "Memberships". It contains two buttons at the top: a green "Add" button and a red "Delete" button. Below these buttons is a list of three items, each with a checkbox on the left:

- Membership
- [Association for Financial Professionals \(AFP\)](#)
- [Association of International Accountants \(AIA\)](#)

Figure 4.2: Memberships List

To delete a membership, click on the check box next to the “Membership” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

5.5 Nationalities

This feature allows the HR Admin to define the different nationalities that present in the company which can later be used in the PIM Module. Various nationalities are already pre-defined.

To add a nationality, go to **Admin>> Nationalities** and click “Add”, a screen as shown in Figure 4.3 would appear.

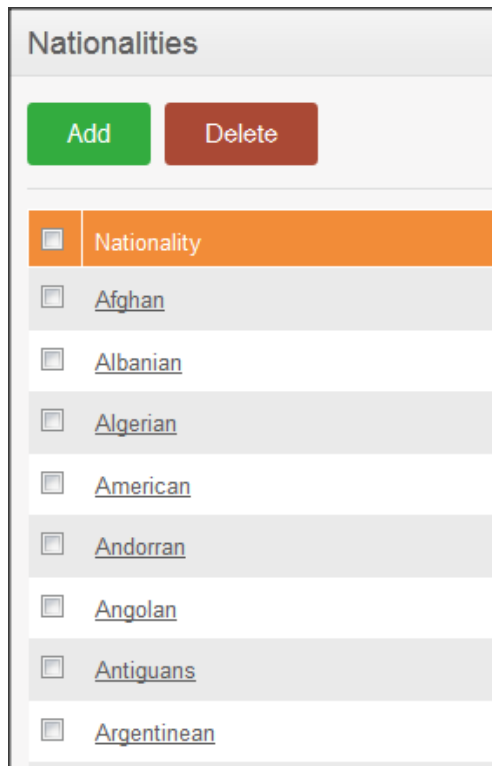
Click “Save” once the field is added.



The form is titled "Add Nationality". It features a text input field labeled "Name *" containing the text "British.". Below the input field, there is a small asterisk and the text "* Required field". At the bottom of the form, there are two buttons: a green "Save" button and a grey "Cancel" button.

Figure 4.3: Add Nationality

A list of nationalities as shown in Figure 4.4 would appear once a “Nationality” is added. You may also add multiple entries of nationalities.



The form is titled "Nationalities". It features two buttons at the top: a green "Add" button and a red "Delete" button. Below the buttons is a list of nationalities. Each entry consists of a checkbox and the name of the nationality. The first entry, "Nationality", is highlighted in orange. The other entries are: Afghan, Albanian, Algerian, American, Andorran, Angolan, Antiguans, and Argentinean.

Figure 4.4: Nationalities List

To delete a nationality, click on the check box next to the “Nationality” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

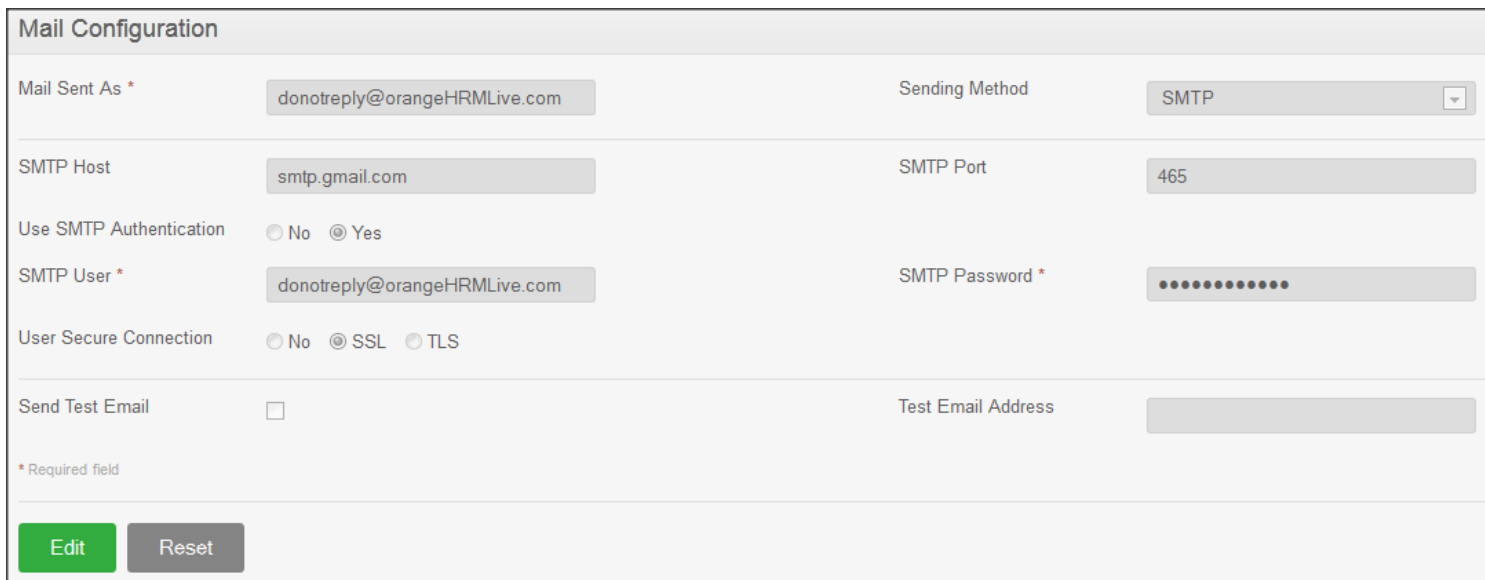
5.6 Configuration

This feature allows you to subscribe and receive notifications and to configure the parameters in setting up the email so notifications will be sent to relevant persons which will quicken the communication processes.

It also allows the HR admin to configure language localization for the entire system, set up a date format and enable/disable module display.

Email Configuration

Configuration of mail settings is essential to accommodate sending and receiving notifications related to the operations performed within the OrangeHRM application (*Ex: leave management*).



Mail Configuration			
Mail Sent As *	<input type="text" value="donotreply@orangeHRMLive.com"/>	Sending Method	<input type="text" value="SMTP"/>
SMTP Host	<input type="text" value="smtp.gmail.com"/>	SMTP Port	<input type="text" value="465"/>
Use SMTP Authentication	<input type="radio"/> No <input checked="" type="radio"/> Yes	SMTP Password *	<input type="password" value="....."/>
SMTP User *	<input type="text" value="donotreply@orangeHRMLive.com"/>	User Secure Connection	<input type="radio"/> No <input checked="" type="radio"/> SSL <input type="radio"/> TLS
Send Test Email	<input type="checkbox"/>	Test Email Address	<input type="text"/>
* Required field			
<input type="button" value="Edit"/> <input type="button" value="Reset"/>			

Figure 4.5: Mail Configuration

To configure the mail settings, go to **Admin>> Configuration>>Email Configuration**, a screen as shown in Figure 4.5 would appear. Enter the fields accurately by clicking “Edit”, and then a test mail to an email address of your choice could be sent to check functionality. Click “Save” when you have entered all the settings and you may check the email account if you specified an address to receive the test mail.

Email Subscriptions

This feature will allow the admin to subscribe to email notifications that will be sent to the employees and supervisors in the system. A copy of the mail will be sent to the email address specified by the Admin. He/she can also select what copies of notifications he should receive. To subscribe to a notification type, go to **Admin>> Configuration>> Email Subscriptions** and a screen a shown in Figure 4.6 would appear.

Email Notification

Save

<input type="checkbox"/> Notification Type	Subscribers
<input checked="" type="checkbox"/> Leave Applications	
<input type="checkbox"/> Leave Assignments	
<input type="checkbox"/> Leave Approvals	
<input type="checkbox"/> Leave Cancellations	
<input type="checkbox"/> Leave Rejections	
<input type="checkbox"/> Performance Review Submissions	

* Click on a notification type to add subscribers
 * Click on Edit button to enable notifications

Figure 4.6: HR Admin Notification Subscription

The HR Admin may also add other subscribers to the following notifications by clicking on the notification types and you will be directed to the screen as shown in Figure 4.7. Once the fields are added, click “Save”.

Add Subscriber

Name *

Email *

* Required field

Save
Cancel

Figure 4.7: Add Subscriber

The entry will then be listed as shown in Figure 4.8 and multiple entries of subscribers for a particular notification type may also be added or deleted.

Subscribers : Leave Applications

Add
Delete
Back

<input type="checkbox"/> Name	Email
<input type="checkbox"/> Lisa Jones	lias.jones@gmail.com

Figure 4.8: Subscriber List for a Notification Type

When you click “Back” you will be directed to the “Email Notification” screen as shown in Figure 4.9 with the added notification subscriber reflected on the screen.

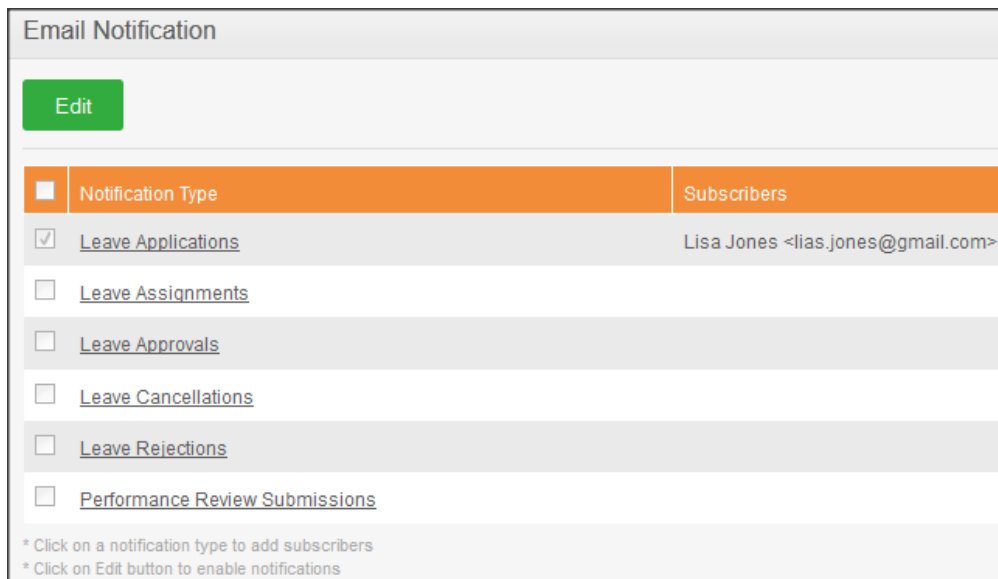


Figure 4.9: Email Notification List of Subscribers

Localization

Language Localization

This feature enables the HR Admin to configure the language settings and translate the OrangeHRM system to the language of your choice. To configure localization settings, go to **Admin>> Configuration>> Localization** and the screen as shown in Figure 5.0 would appear. Click “Edit” to edit the fields.

The default language of the system is US English however you may also use an already set up browser language to translate the system to the language of choice. For example: If you are using Firefox as your browser and it’s translated in UK English language and you want to use this particular language, click on the “Use Browser Language if set” and select from the “Supported Language” provided.

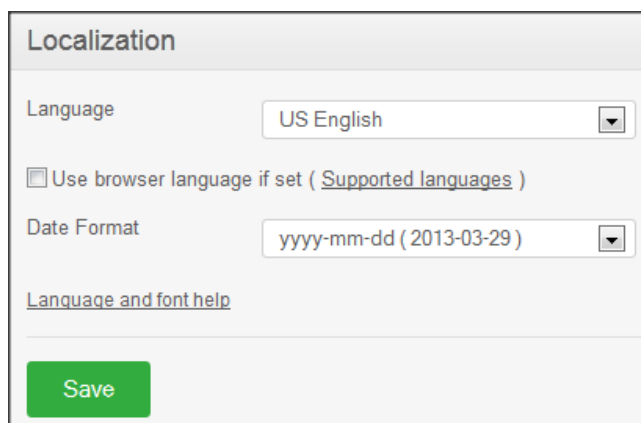


Figure 5.0: Localization

The language pack tool can also be obtained from the website by clicking on “Language and font help” as shown in Figure 5.0, where you will be diverted to the web page or by simply browsing through the OrangeHRM Website (www.orangehrm.com >> Community>> Translators).

Date Format Localization

This feature allows the HR Admin to set up the date format that will be reflected throughout the whole system as shown in Figure 5.0.

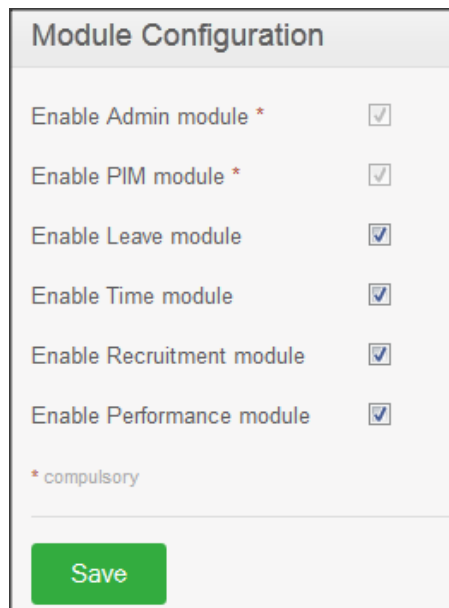
Once you have configured the localization settings, click “Save”.

Modules

This feature enables the HR Admin to configure the display/hidden settings of the modules of the system. To configure the module display settings, go to **Admin>> Configuration>> Modules** and the screen as shown in Figure 5.1 will appear.

Click “Edit “to edit module display. You may select from the list the modules you want to be displayed/hidden.

Click “Save” one module configuration is completed.



The screenshot shows a web interface titled "Module Configuration". It contains a list of modules with checkboxes to enable or disable them. All checkboxes are checked. The modules listed are:

Module Name	Enabled
Enable Admin module *	<input checked="" type="checkbox"/>
Enable PIM module *	<input checked="" type="checkbox"/>
Enable Leave module	<input checked="" type="checkbox"/>
Enable Time module	<input checked="" type="checkbox"/>
Enable Recruitment module	<input checked="" type="checkbox"/>
Enable Performance module	<input checked="" type="checkbox"/>

Below the list, there is a note: "* compulsory". At the bottom of the form is a green "Save" button.

Figure 5.1: Module Configuration

6.0 PIM Module

This core module maintains all relevant employee related information, including different types of personal information, detailed qualifications, work experience, job related information etc. Information captured in this module is utilized by all other modules, thus eliminating data redundancy. Records can be either entered manually one by one or imported from a CSV file. You cannot import all the details but you can edit the remaining fields.

The functionality of the PIM Module differs depending on the rights of the user.

The HR can:

- Configure optional/custom fields, data import from CSV, define reporting methods and termination reasons that will be used throughout the module.
- View all employee details
- Add employee on the list.
- Generate employee report

ESS-Supervisor can:

- View his personal details as well as his/her subordinates.

ESS-Employee:

- Has no access to the PIM module but can view his personal details under the 'My Info' Module.

6.1 Configuration

This allows the HR Admin to add optional fields and custom fields to the module, define various termination reasons, reporting methods and import data from CSV.

Optional Fields

This feature allows the admin to add fields to the "Personal Details" screen that may be specific to the company or country. To configure the "Optional Fields" settings, go to PIM>> Configuration>> Optional Fields and the screen as shown in Figure 5.2 will appear.

Configure PIM

Show Deprecated Fields

Show Nick Name, Smoker and Military Service in Personal Details

Country Specific Information

Show SSN field in Personal Details

Show SIN field in Personal Details





Show US Tax Exemptions menu

Save

Figure 5.2: Optional Fields Configuration

You may click on the checkbox beside the field you want to add and click “Save” once the fields are selected. The field(s) selected will then be reflected under the “Personal Details” screen as shown in Figure 5.3

Personal Details

Full Name	* First Name <input type="text" value="Mark"/>	Middle Name <input type="text"/>	* Last Name <input type="text" value="Boucher"/>
Employee Id	<input type="text" value="0004"/>	Other Id	<input type="text"/>
Driver's License Number	<input type="text" value="DL2358-7347"/>	License Expiry Date	<input type="text" value="2020-03-10"/> 
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female	Marital Status	<input type="text" value="Single"/> 
Nationality	<input type="text" value="American"/> 	Date of Birth	<input type="text" value="1990-03-29"/> 
Nick Name	<input type="text"/>	Smoker	<input type="checkbox"/>
Military Service	<input type="text"/>		

* Required field

Edit

Figure 5.3: Optional Fields added to Personal Details Screen

Custom Fields

This feature allows the Admin to customize and add fields to all the screen of the PIM Module that may be specific and relevant to the company. To add a custom field, go to PIM>>Configuration>>Custom Fields, click “Add” and the screen as shown in Figure 5.4 will appear

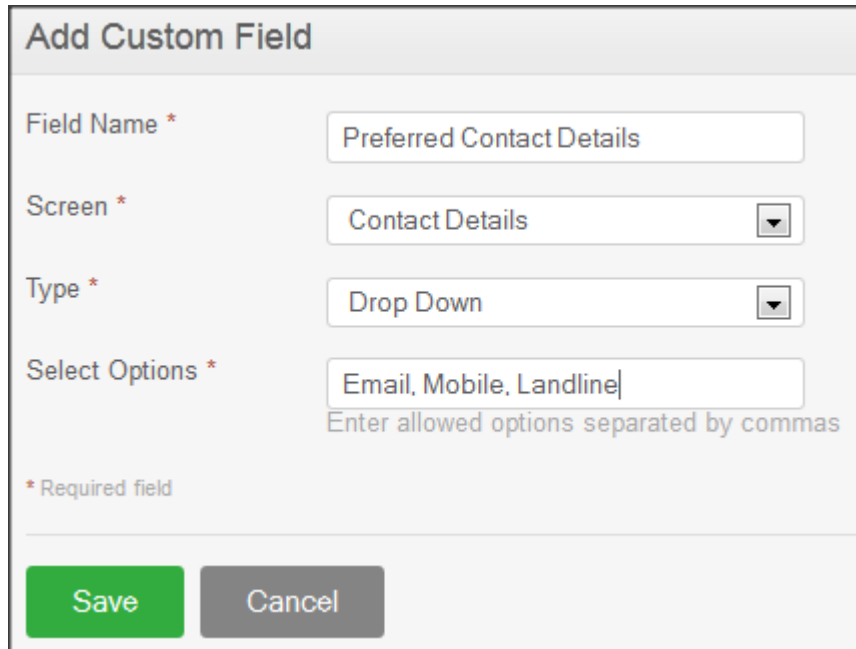
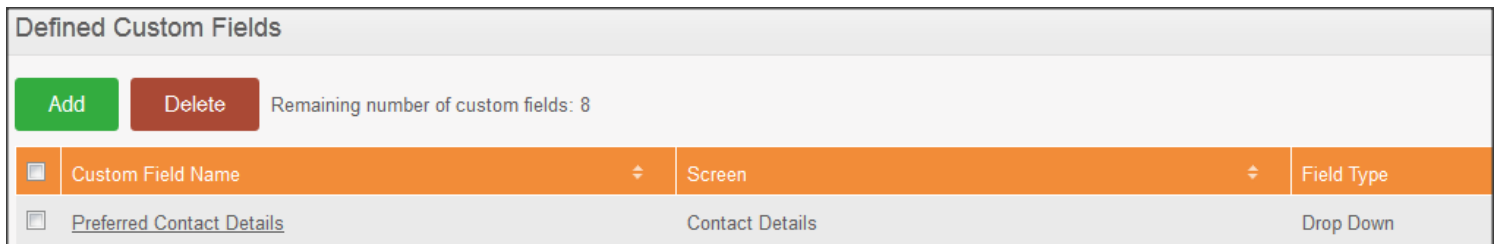


Figure 5.4: Add Custom Field

Define the “Field Name” you want to add, the “Screen” you want the field to appear in, the mode of entering the data whether it’s a “Drop Down” selection or “Text or Number” and the if it’s a “Drop Down”, the options the employees can select from.

Click “Save” once you have entered the details and the fields defined for a particular screen will then be added.

The entry added will then be listed as shown in Figure 5.5. You may add a maximum of 10 fields per screen.



Custom Field Name	Screen	Field Type
Preferred Contact Details	Contact Details	Drop Down

Figure 5.5: Define Custom Fields

You may also add multiple entries of custom fields. To delete a custom field click on the check box next to the Custom Field Name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Data Import

This feature allows the Admin to import data from a CSV file. To import data, go to PIM>> Configuration>> Data Import and the screen as shown in Figure 5.6 will appear.

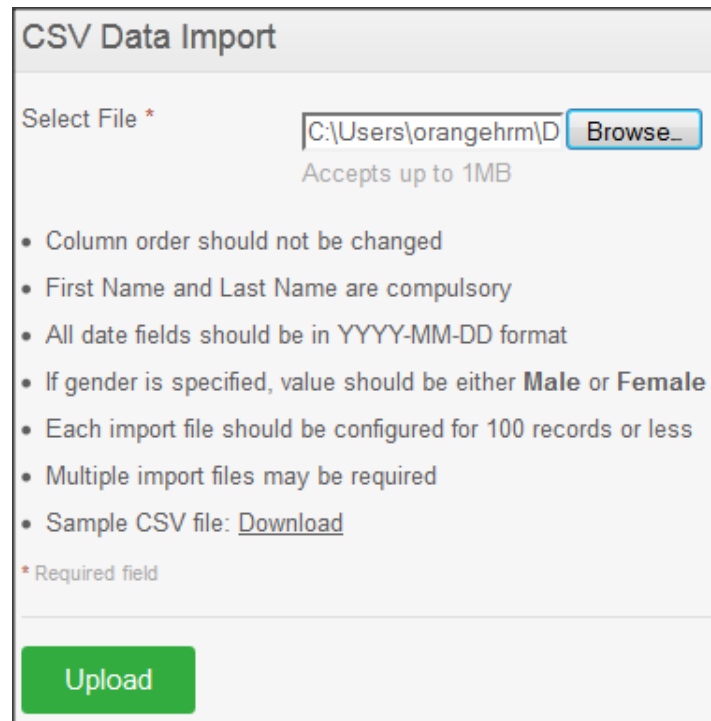


Figure 5.6: CSV Data Import

The following guidelines are stated for a smooth flow of data import:

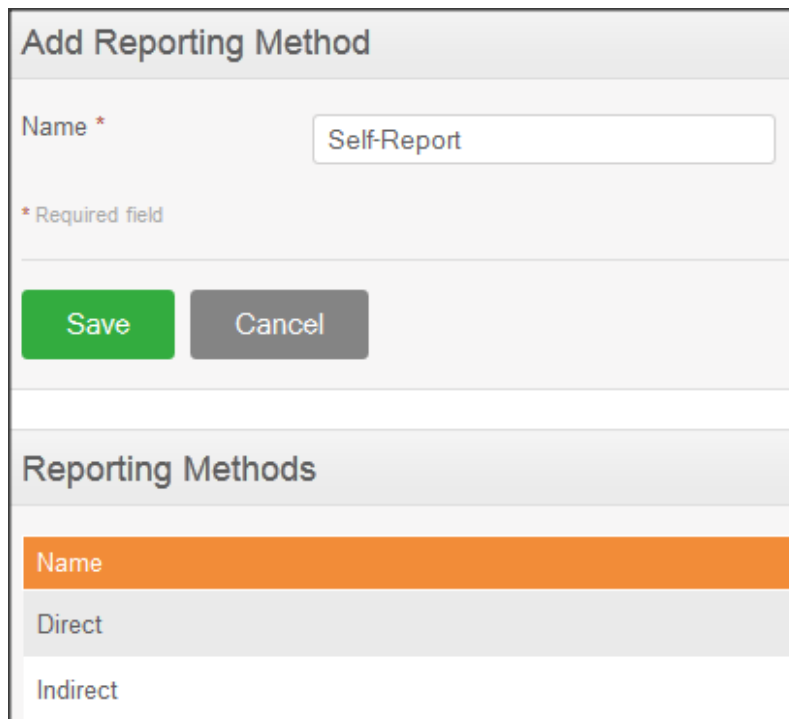
- Column order should not be changed: [the column format of the CSV File should be the same as the “Sample CSV File”](#). Click on [Sample CSV File: “Download”](#) to view the column format.
- First Name and Last Name are compulsory
- All data fields should be in YYYY-MM-DD format: [if you have configured the date format under “Localization” \(see Figure 5.0\)](#) the date will then be converted from YYYY-MM-DD to the localized date format.
- If gender is specified, value should be either male or female
- Each import should be configured for 100 records or less – [maximum of 100 records can be imported](#).
- Multiple import files may be required: [you may carry out multiple imports but maximum of 100 records or less per data import](#).

Sample CSV File: “Download” - [to view the column format](#).

To import data, select the file by clicking “Browse” and select the CSV file you want to upload. Click “Upload” once you have selected the file. The data will then be populated on the “Employee List” screen.

Reporting Methods

The HR admin can define the reporting method between an ESS-Employee and an ESS-Supervisor. To define the reporting method, go to **PIM>> Configuration>> Reporting Methods** and click “Add”, the screen as shown in Figure 5.7 will appear.

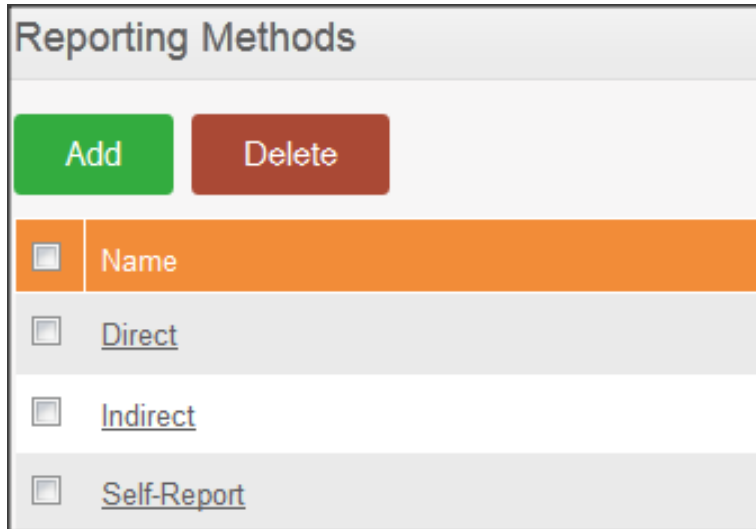


Name
Direct
Indirect

Figure 5.7: Add Reporting Method

“Direct” and “Indirect” Reporting Method are already pre-defined. To add, enter the reporting method “Name” and click “Save”

The reporting method name will then be listed as shown in Figure 5.8.



The image shows a web interface titled "Reporting Methods". At the top, there are two buttons: a green "Add" button and a red "Delete" button. Below these buttons is a list of reporting methods. Each method is represented by a row with a checkbox on the left and the method name on the right. The methods listed are "Name", "Direct", "Indirect", and "Self-Report". The "Name" row is highlighted in orange.

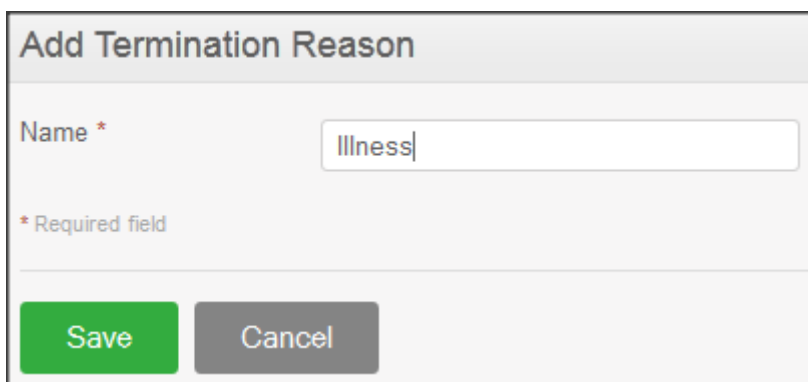
<input type="checkbox"/>	Name
<input type="checkbox"/>	Direct
<input type="checkbox"/>	Indirect
<input type="checkbox"/>	Self-Report

Figure 5.8: Reporting Method

You may also add multiple entries of reporting methods. To delete a reporting method click on the check box next to the Reporting Method Name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete".

Termination Reasons

This feature allows the HR Admin to define various termination reasons that is used by the company. To add a termination reason, go to PIM>>Configuration>>Termination Reason and click "Add", the screen as shown in Figure 5.9 would appear. Click "Save" once the fields are added.



The image shows a web form titled "Add Termination Reason". It has a single text input field labeled "Name *" with the value "Illness" entered. Below the input field, there is a red asterisk and the text "* Required field". At the bottom of the form, there are two buttons: a green "Save" button and a grey "Cancel" button.

Figure 5.9: Add Termination Reason

The entry will then be added to the list as shown in Figure 6.0.

Termination Reasons
Name
Contract Not Renewed
Deceased
Dismissed
Laid-off
Other
Physically Disabled/Compensated
Resigned
Resigned - Company Requested
Resigned - Self Proposed
Retired

Figure 6.0: Termination Reasons

The following are default termination reasons:

- Contract not renewed
- Deceased
- Dismissed
- Laid-off
- Other
- Physically Disabled/Compensated
- Resigned
- Resigned-Company Requested
- Resigned-Self Proposed
- Retired

You may also add multiple entries of termination reasons. To delete a termination reason click on the check box next to the “Termination Reason” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

6.2 Employee List

Lists all the employees entered and imported into the PIM. You can view/edit details of a particular employee by clicking on the employee's name or ID. To view the employee list, go to PIM>>Employee List and the screen as shown Figure 6.1 would appear.

<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>	Id	First (& Middle) Name	Last Name	Job Title	Employment Status	Sub Unit	Location	Supervisor	
<input type="checkbox"/>	0004	Mark	Boucher	Finance Manager	Full-Time Permanent	Finance Division	HQ		
<input type="checkbox"/>	0011	Jennifer	Brown	Audit Trainee	Full time Contract	Finance Division	HQ	Mark Boucher	
<input type="checkbox"/>		Anne	Clinton	Controller					
<input type="checkbox"/>	0002	Russel	Hamilton	HR Admin	Full-Time Permanent	HR	HQ	Kevin Mathews, Nick Silverstone	
<input type="checkbox"/>	0001	Kevin	Mathews	IT Manager	Part-Time Contract	IT Division	HQ		

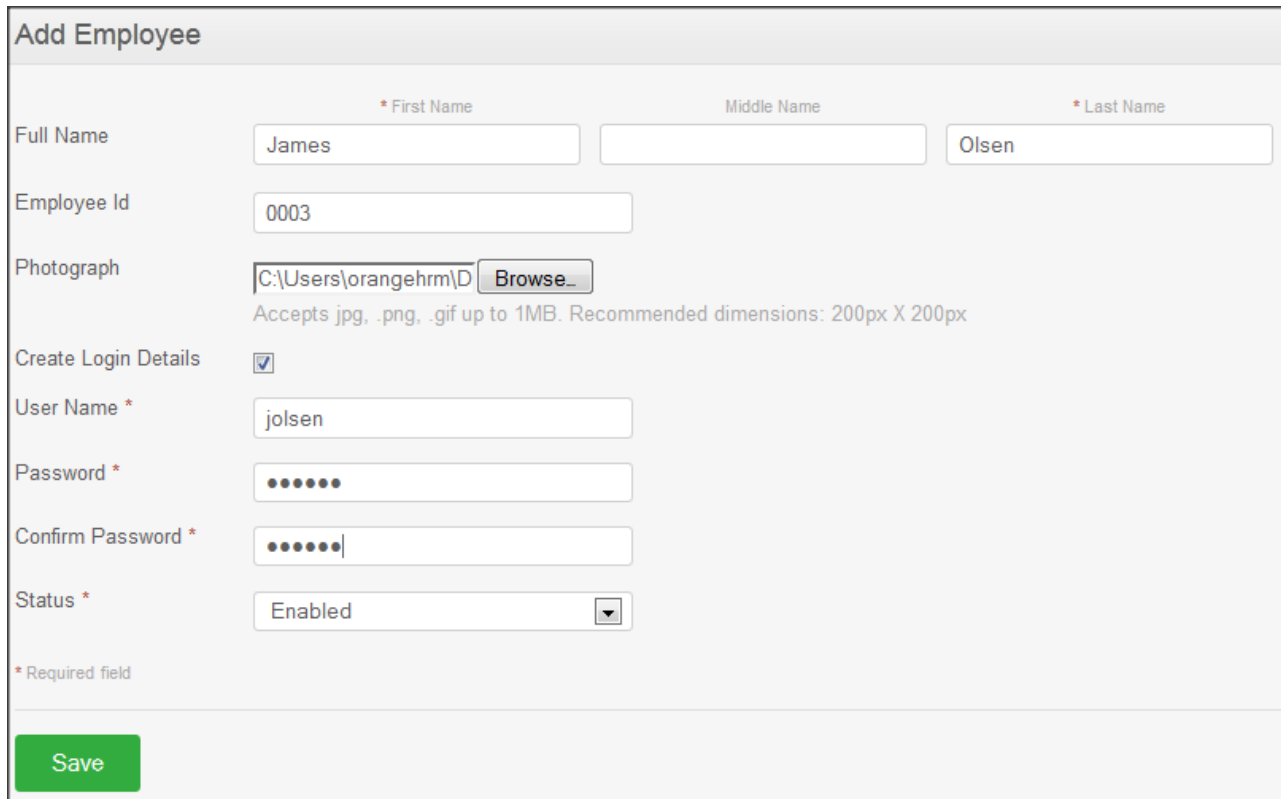
Figure 6.1: Employee List

You may add multiple entries of employees by clicking “Add” through the screen as shown in Figure 6.1 or you may go to PIM>> Add Employee to enter employee details. (See Figure 6.2)

To delete an employee, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

6.3 Add Employee

A new employee is added to the system here. Other than importing details this feature allows to add an employee and define a very informative profile. To add an employee, go to PIM>>Add Employee and the screen as shown in Figure 6.2 will appear.



Add Employee

Full Name:

Employee Id:

Photograph:
Accepts jpg, .png, .gif up to 1MB. Recommended dimensions: 200px X 200px

Create Login Details:

User Name *:

Password *:

Confirm Password *:

Status *:

* Required field

Figure 6.2: Add Employee

Enter the relevant fields and you may also add a picture of the employee. To add a picture, click on “Choose File” and select the picture from the relevant path and click “Open”. Employee code is generated automatically, but can be changed if required.

You may also create a user login for the employee through this screen.

***Note:** Please note that the maximum file size of the picture cannot exceed 1 megabyte. Click “Save” once completed.

Employee’s Personal Details

The following information needs to be obtained from each employee to create a complete employee profile that may be used by the company. These features are explained in details as we go on.

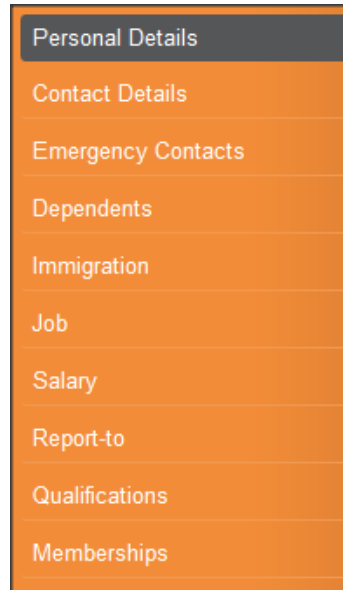


Figure 6.3: Employee Details Column

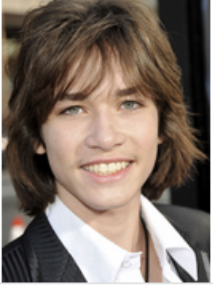
Personal Details

Once you have added and saved the employee name with his/her picture and the user logins, the screen as shown in Figure 6.4 will appear. You can also edit the personal details listed below by clicking “Edit” on the bottom of the screen. Clicks “save” once the fields are added.





You can edit the following;

- * Code – Employee Id/No
- * Last Name
- * First Name
- * Middle Name
- * Nick Name
- * Nationality – Select from a list of pre-defined nationalities
- * Date of Birth
- * Other Id
- * Marital Status – Select from the drop down
- * Smoker – If the employee is a smoker click on the box
- * Gender – Click on the relevant gender
- * Driver’s License Number
- * License Expiry Date
- * Military Service

James Olsen



Personal Details

Full Name	<small>* First Name</small>	<small>Middle Name</small>	<small>* Last Name</small>
	<input type="text" value="James"/>	<input type="text"/>	<input type="text" value="Olsen"/>
Employee Id	<input type="text" value="0003"/>	Other Id	<input type="text"/>
Driver's License Number	<input type="text"/>	License Expiry Date	<input type="text" value="yyyy-mm-dd"/> 
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female	Marital Status	<input type="text" value="Single"/> 
Nationality	<input type="text" value="American"/> 	Date of Birth	<input type="text" value="1994-04-13"/> 
Nick Name	<input type="text" value="Jimmy"/>	Smoker	<input type="checkbox"/>
Military Service	<input type="text" value="None"/>		

* Required field

Attachments

- Personal Details
- Contact Details
- Emergency Contacts
- Dependents
- Immigration
- Job
- Salary
- Report-to
- Qualifications
- Memberships

Figure 6.4: Personal Details

Click “Save” once completed.

You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and upload the following file by clicking “Upload” as shown in Figure 6.5.

Add Attachment

Select File

Accepts up to 1MB

Comment

* Required field

Figure 6.5: Attachments

You may upload multiple entries of supporting attachments. You may edit the following attachments by clicking “Edit” on the right hand end of a particular entry as shown in Figure 6.6. To delete an attachment, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Attachments							
<input type="button" value="Add"/>		<input type="button" value="Delete"/>					
<input type="checkbox"/>	File Name	Description	Size	Type	Date Added	Added By	
<input type="checkbox"/>	Birth Certificate.docx	Birth Certificate	9.93 k	application/vnd.openxmlformats-officedocument.wordprocessingml.document	2013-04-02	Admin	Edit
<input type="checkbox"/>	Image.jpg	Profile picture	78.31 k	image/jpeg	2013-04-02	Admin	Edit

Figure 6.6: Manage Attachments

Contact Details

Contact information of an employee can be entered from here. Click on “Contact Details” from the Employee Details column and the screen as shown in Figure 6.7 will appear.

Contact Details	
Address Street 1	<input type="text" value="14 Victoria Street"/>
Address Street 2	<input type="text"/>
City	<input type="text" value="New York"/>
State/Province	<input type="text" value="New York"/> ▼
Zip/Postal Code	<input type="text" value="14321"/>
Country	<input type="text" value="United States"/> ▼
Home Telephone	<input type="text" value="+1 1231 562 9452"/>
Mobile	<input type="text"/>
Work Telephone	<input type="text"/>
Work Email	<input type="text" value="jolsen12@gmail.com"/>
Other Email	<input type="text"/>
<input type="button" value="Save"/>	

Figure 6.7: Contact Details

Click “Edit” to enter the information.

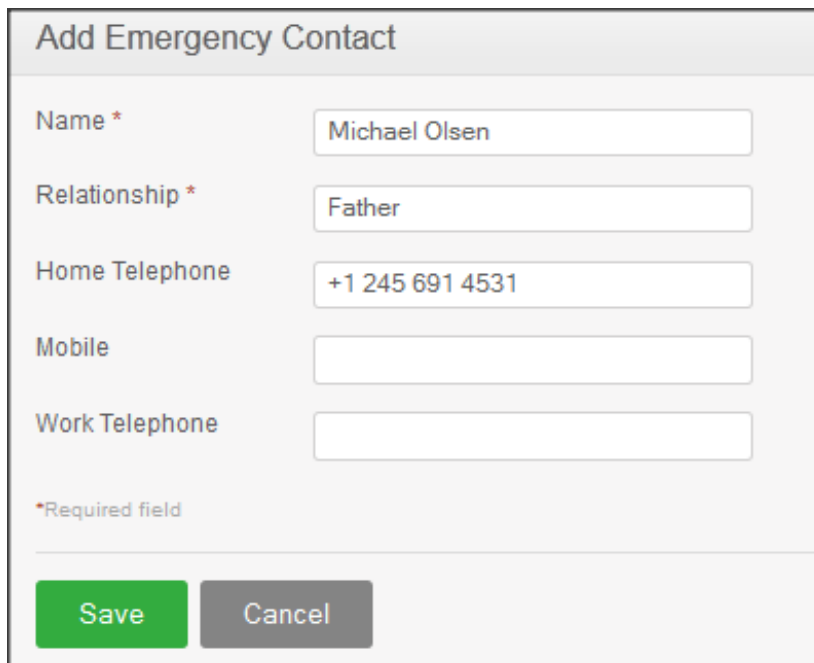
You can edit the following;

1. Country – Select the country from the drop down
2. Street 1
3. Street 2
4. City/Town
5. State/Province – If the country is United States you can select from the drop down or you need to enter it manually
6. ZIP Code
7. Home Telephone
8. Mobile
9. Work Telephone
10. Work Email
11. Other Email

Once you completed this form click “Save”.

Emergency Contact

Contact details of an employee which will be needed during an emergency can be entered here. Select “Emergency Contacts” from the Employee Details column and the screen as shown in Figure 6.8 will appear.



The screenshot shows a web form titled "Add Emergency Contact". It contains several input fields: "Name *" with the value "Michael Olsen", "Relationship *" with the value "Father", "Home Telephone" with the value "+1 245 691 4531", "Mobile", and "Work Telephone". A legend indicates that fields with an asterisk are required. At the bottom, there are "Save" and "Cancel" buttons.

Figure 6.8: Add Emergency Contact

Enter the “Name” of the person you wish the company to contact in case of emergency, the “Relationship” of the employee to the contact person provided and a “Home Telephone” or “Mobile Number” the company can reach him/her.

Click “Save” once the fields are added the emergency contact will be listed as shown in Figure 6.9.

Assigned Emergency Contacts

Add
Delete

<input type="checkbox"/>	Name	Relationship	Home Telephone	Mobile	Work Telephone
<input type="checkbox"/>	Michael Olsen	Father	+1 245 691 4531		

Attachments

Add

Figure 6.9: Assigned Emergency Contacts

You may add multiple entries of emergency contact person. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and upload the following file by clicking “Upload”.

Dependents


If an employee has any dependants you can enter them here. To add a dependent, click on “Dependents” from the Employee Details column and the screen as shown in Figure 7.0 will appear.

Add Dependent

Name *

Relationship * ▼

Please Specify *

Date of Birth 

*Required field

Figure 7.0: Add Dependent

Enter the “Name” of the dependant of the employee, the “Relationship” of the dependant to the employee and the “Date of Birth” of the dependant. Click “Save” once you have entered the following fields and the dependant will be listed as shown in Figure 7.1.

Assigned Dependents

	Name	Relationship	Date of Birth
<input type="checkbox"/>	Mary O'Connor	Wife	1994-01-19

Attachments

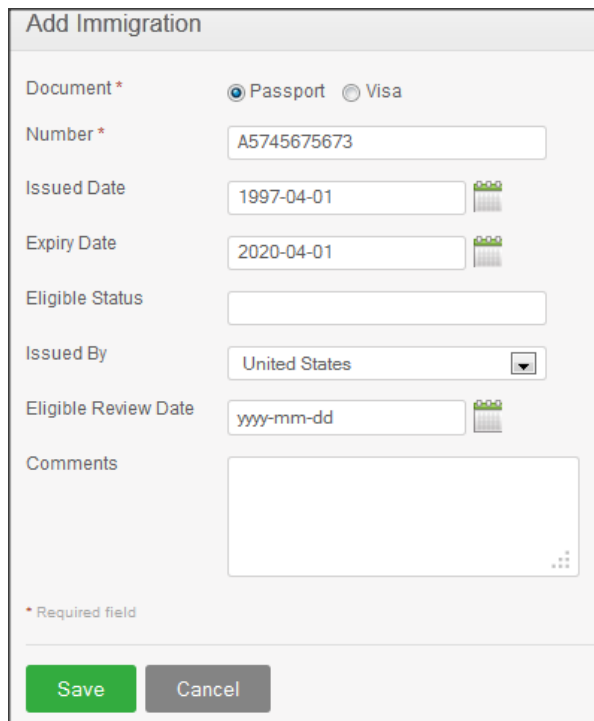
Figure 7.1: Assigned Dependents

You may add multiple entries of dependants. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and upload the following file by clicking “Upload”.

Immigration


Immigration information can be entered here. To add immigration information of a particular employee, select “Immigration” from the Employee Details column and the screen as shown in Figure 7.2 will appear.




Add Immigration


Document * Passport Visa


Number *

Issued Date 

Expiry Date 

Eligible Status

Issued By 

Eligible Review Date 

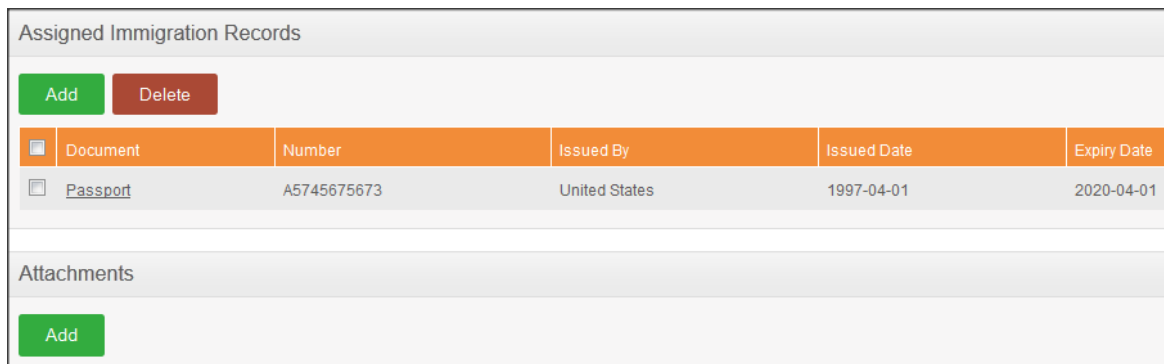
Comments

* Required field

Figure 7.2: Add Immigration

Select the document type (Passport or Visa) you wish to add details of, the “Number” whether it is a passport number or a visa number, the “Issued Date”, “Expiry Date”, the “Eligible Status” of his Passport/Visa and the “Eligible Review Date” as to when the eligibility status was reviewed. You may write a comment if necessary.

Click “Save” once the fields are added and the following immigration documents will be listed as shown in Figure 7.3.



Assigned Immigration Records

<input type="checkbox"/>	Document	Number	Issued By	Issued Date	Expiry Date
<input type="checkbox"/>	Passport	A5745675673	United States	1997-04-01	2020-04-01

Attachments

Figure 7.3: Assigned Immigration Documents

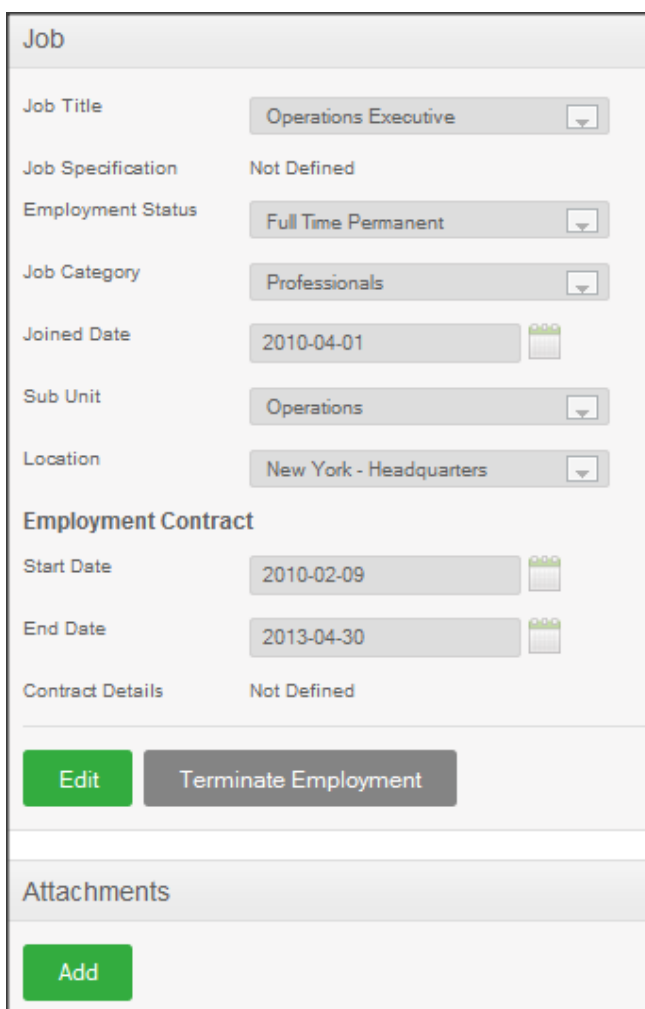
You may add multiple entries of immigration documents. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and upload the following file by clicking “Upload”.

Job

You could describe the role of the employee in the company through this feature. To define the employee’s job, select “Job” from the Employee Details column and the screen as shown in Figure 7.4 will appear. Click “Edit” to enter the job details of the employee.

Enter the following fields and click “Save” once done.



Job	
Job Title	Operations Executive
Job Specification	Not Defined
Employment Status	Full Time Permanent
Job Category	Professionals
Joined Date	2010-04-01
Sub Unit	Operations
Location	New York - Headquarters
Employment Contract	
Start Date	2010-02-09
End Date	2013-04-30
Contract Details	Not Defined
Edit Terminate Employment	
Attachments	
Add	

Figure 7.4: Job

You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and upload the following file by clicking “Upload”.

You may also terminate the employment of an employee by clicking “Terminate Employment” and the screen as shown in Figure 7.5 will appear.

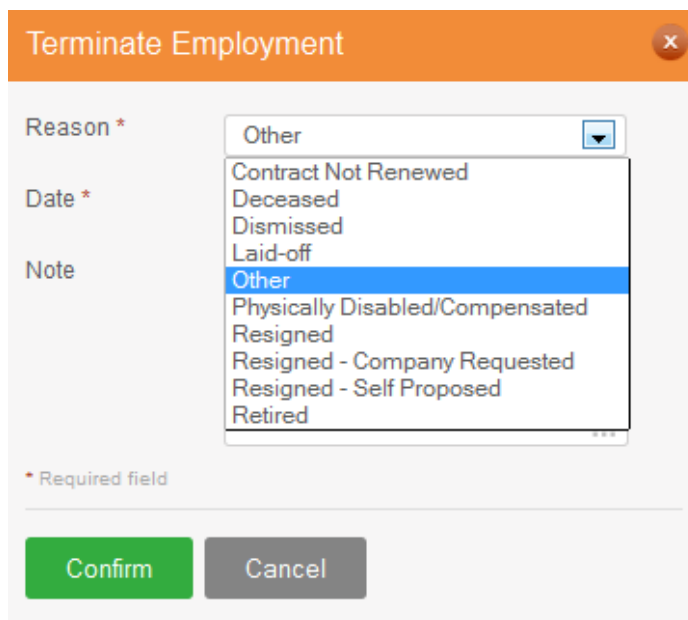


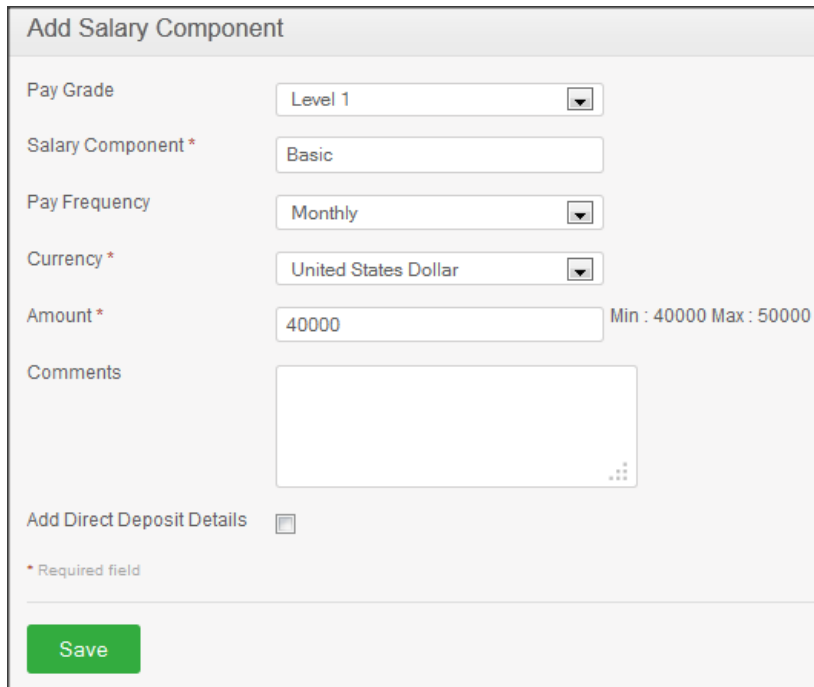
Figure 7.5: Terminate Employment

You may select the employment “Termination Reason”, the “Date” (the current date is the default date) the employee was terminated and a note regarding the termination of employment. The termination reasons have been pre-defined under Configuration>> Termination Reasons.

Click “Confirm” to confirm the termination. The employee name will no longer appear in the employee list database.

Salary

Information with regards to salary of an employee is entered here. To define the employee’s salary information, select “Salary” from the Employee Details column and the screen as shown in Figure 7.6 will appear.



The screenshot shows a web form titled "Add Salary Component". It contains the following fields and controls:

- Pay Grade:** A dropdown menu with "Level 1" selected.
- Salary Component *:** A text input field containing "Basic".
- Pay Frequency:** A dropdown menu with "Monthly" selected.
- Currency *:** A dropdown menu with "United States Dollar" selected.
- Amount *:** A text input field containing "40000". To its right, the text "Min : 40000 Max : 50000" is displayed.
- Comments:** A large text area for entering notes.
- Add Direct Deposit Details:** A checkbox that is currently unchecked.
- Save:** A green button at the bottom of the form.

A legend at the bottom left indicates that fields with an asterisk (*) are required.

Figure 7.6: Add Salary Component

Enter the following fields:

- **Pay Grade:** the pay grade category that the employee falls under (Pre-defined under Admin Module)
- **Salary Component:** The different compensation that an employee obtains from the company
- **Pay Frequency:** The frequency that an employee is paid his/her salary
- **Currency:** The currency that employee is paid in(pre-defined under Admin Module)
- **Amount:** based on an employee's pay grade category, a minimum and maximum salary amount is specified (Pre-defined under Admin Module) and cannot be less than or greater than the specified amount.
- **Comment :** you may enter any important comment regarding the salary information

➤ Direct Deposit

If salaries of employees are to be transferred or deposited into accounts, those details can be specified here.

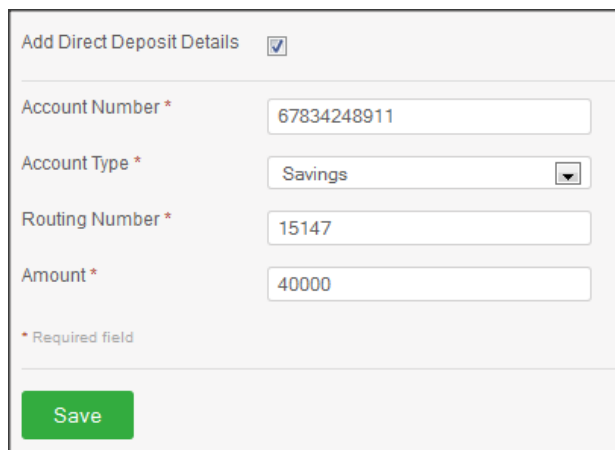
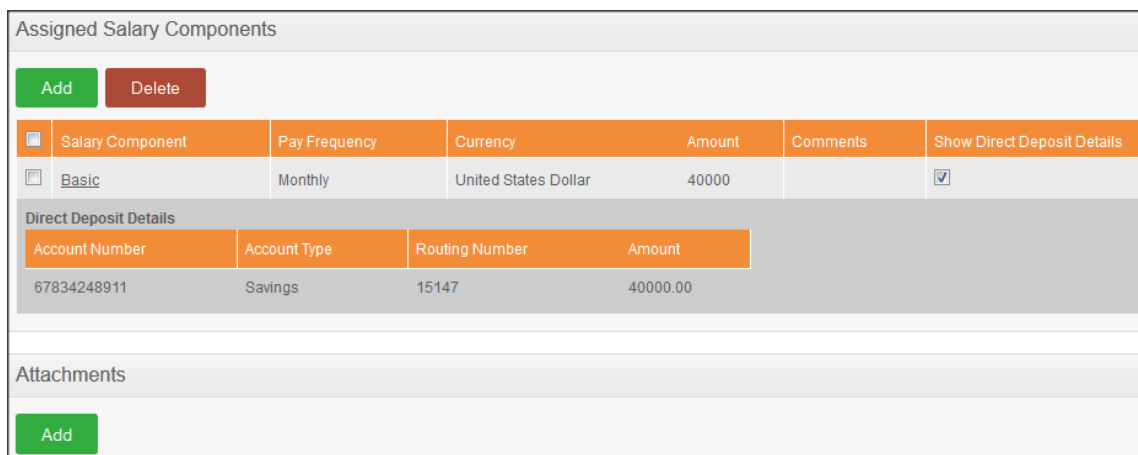


Figure 7.7: Add Direct Deposit Details

Click on the “Add Direct Deposit Details” check box and enter the following details:

- Account Number:
- Account Type: Savings/ Checking/Others. If “Others” is selected, you need to specify other account types that an employee may have.
- Routing Number: routing number of the checks.
- Amount: the amount to be deposited.

Once you have entered the following details, click “Save” and the following salary components with the direct deposit details will be listed as shown in Figure 7.8.



Assigned Salary Components						
<input type="button" value="Add"/>		<input type="button" value="Delete"/>				
<input type="checkbox"/>	Salary Component	Pay Frequency	Currency	Amount	Comments	Show Direct Deposit Details
<input type="checkbox"/>	Basic	Monthly	United States Dollar	40000		<input checked="" type="checkbox"/>
Direct Deposit Details						
Account Number	Account Type	Routing Number	Amount			
67834248911	Savings	15147	40000.00			
Attachments						
<input type="button" value="Add"/>						

Figure 7.8: Assigned Salary Components

You may enter multiple salary components. . To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and upload the following file by clicking “Upload”.

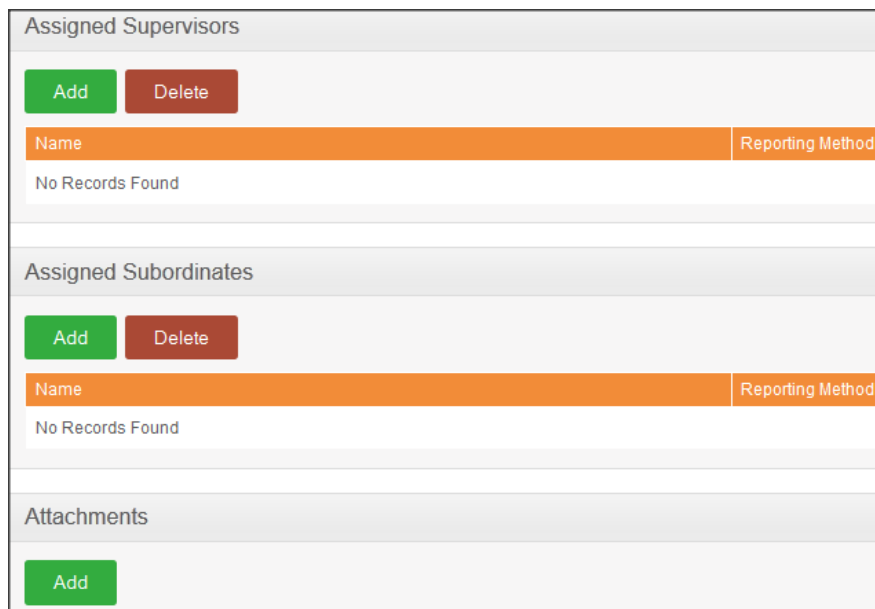
Report To

Here you can define to whom the particular employee will report-to or who his subordinates are. Once this is done the particular supervisor will be able to view the following when he logs in;

- PIM of the particular employee
- Leave Summary of his subordinates
- Leave List of his subordinates
- Attendance Report of his subordinates
- Time Sheets of his subordinates

You can set an employee to report-to more than one supervisor and a supervisor can have many subordinates who report to him.

To define the supervisors and the subordinates of a particular employee, select “Report to” from the Employee Details column and the screen as shown in Figure 7.9 will appear.



Assigned Supervisors	
<input type="button" value="Add"/>	<input type="button" value="Delete"/>
Name	Reporting Method
No Records Found	

Assigned Subordinates	
<input type="button" value="Add"/>	<input type="button" value="Delete"/>
Name	Reporting Method
No Records Found	

Attachments
<input type="button" value="Add"/>

Figure 7.9: Report-to

To assign a supervisor/subordinate for a particular employee, click “Add” under “Assigned Supervisors” or “Assigned Subordinate” and the screen as shown in Figure 8.0 and Figure 8.1 will appear respectively.

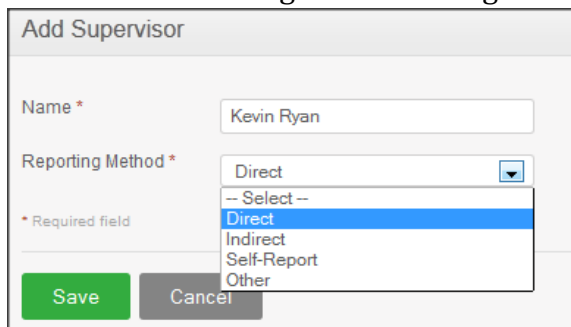


Figure 8.0: Add Supervisor

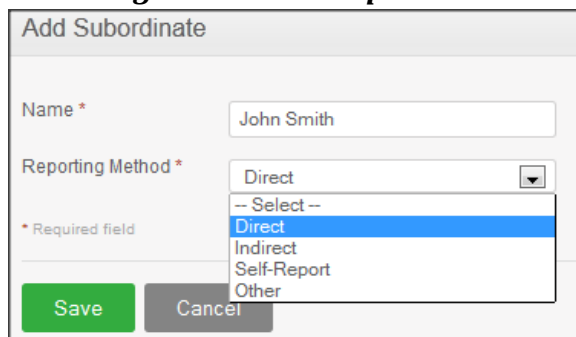


Figure 8.1: Add Subordinate

Enter the “Name” of the supervisor/subordinate and select from the “Reporting Method” selections. Click “Save” once the fields are entered.

Once the supervisor/subordinates have been defined they will be listed as shown in Figure 8.2.

Assigned Supervisors	
<input type="button" value="Add"/>	<input type="button" value="Delete"/>
<input type="checkbox"/> Name	Reporting Method
<input type="checkbox"/> Kevin Ryan	Direct
Assigned Subordinates	
<input type="button" value="Add"/>	<input type="button" value="Delete"/>
<input type="checkbox"/> Name	Reporting Method
<input type="checkbox"/> John Smith	Direct
Attachments	
<input type="button" value="Add"/>	

Figure 8.2: Assigned Supervisors/Assigned Subordinates

You may enter multiple entries of supervisors or subordinates for a particular employee. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and upload the following file by clicking “Upload”.

Qualifications

➤ Work Experience

Previous work experiences of an employee can be entered here. To enter employee’s previous work experience, select “Qualification” under the Employee Details column and click “Add” under “Work Experience” and the screen as shown in Figure 8.3 will appear.

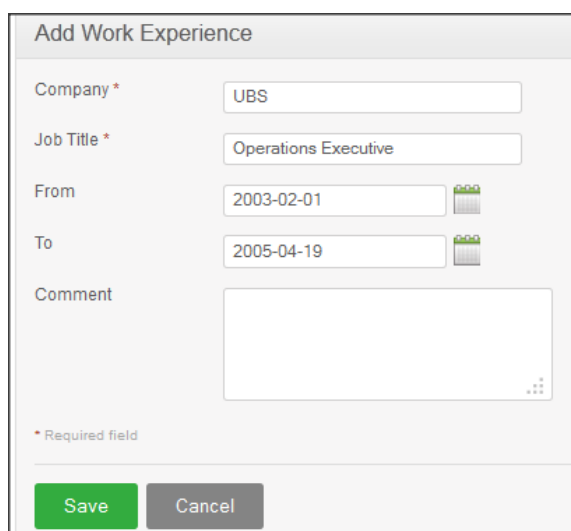
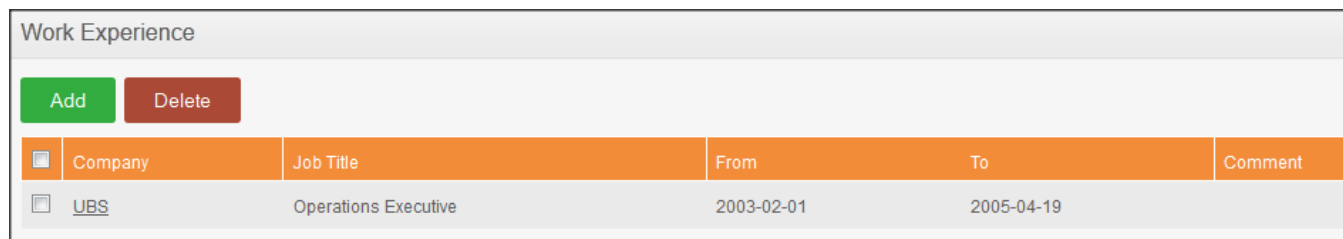


Figure 8.3: Add Work Experience

Click “Save” once all the fields are entered and the particular work experience will be listed as shown in Figure 8.4.



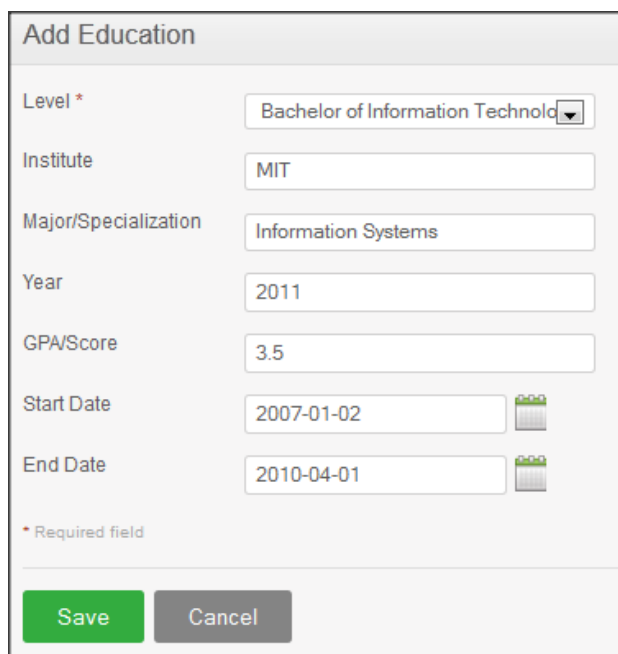
Work Experience					
<input type="button" value="Add"/> <input type="button" value="Delete"/>					
<input type="checkbox"/>	Company	Job Title	From	To	Comment
<input type="checkbox"/>	UBS	Operations Executive	2003-02-01	2005-04-19	

Figure 8.4: Work Experience

You may enter multiple entries of work experience. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

➤ **Education**

Education details of an employee can be entered here. To enter employee’s education background, select “Qualification” under the Employee Details column and click “Add” under “Education” and the screen as shown in Figure 8.5 will appear.



Add Education


Level *


Institute

Major/Specialization

Year

GPA/Score

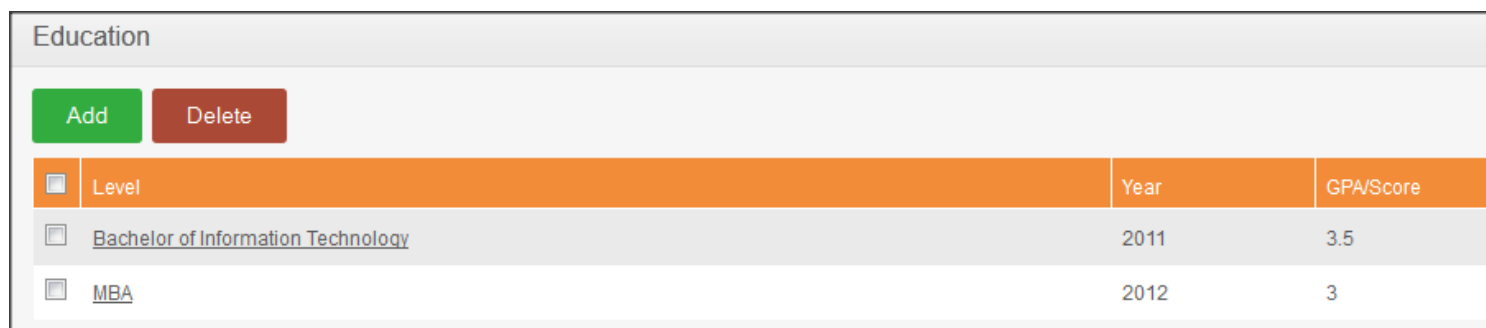
Start Date 

End Date 

* Required field

Figure 8.5: Add Education

Click “Save” once all the fields are entered and the particular work experience will be listed as shown in Figure 8.6.



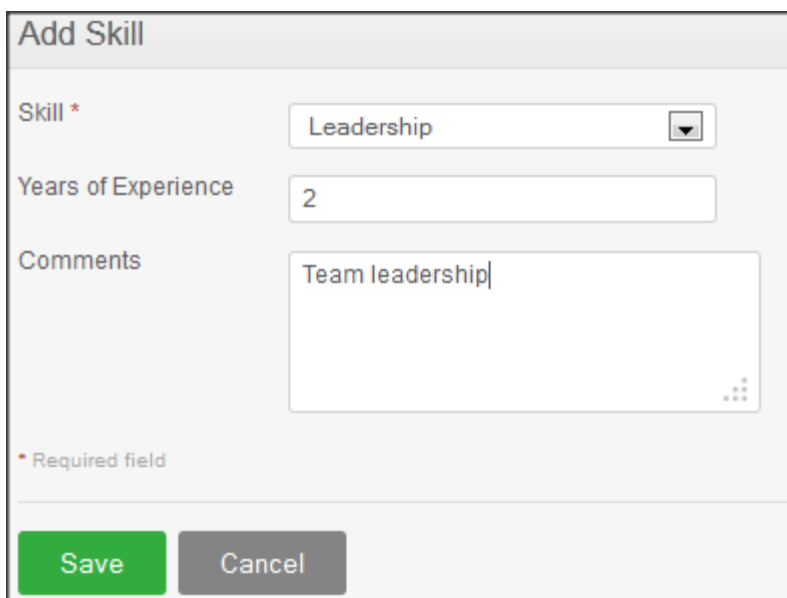
Education			
<input type="button" value="Add"/>		<input type="button" value="Delete"/>	
<input type="checkbox"/>	Level	Year	GPA/Score
<input type="checkbox"/>	Bachelor of Information Technology	2011	3.5
<input type="checkbox"/>	MBA	2012	3

Figure 8.6: Education

You may enter multiple entries of education. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

➤ Skills

If an employee has any special talents or skills they can be entered here. To enter an employee’s skills, select “Qualification” under the Employee Details column and click “Add” under “Skills” and the screen as shown in Figure 8.7 will appear.



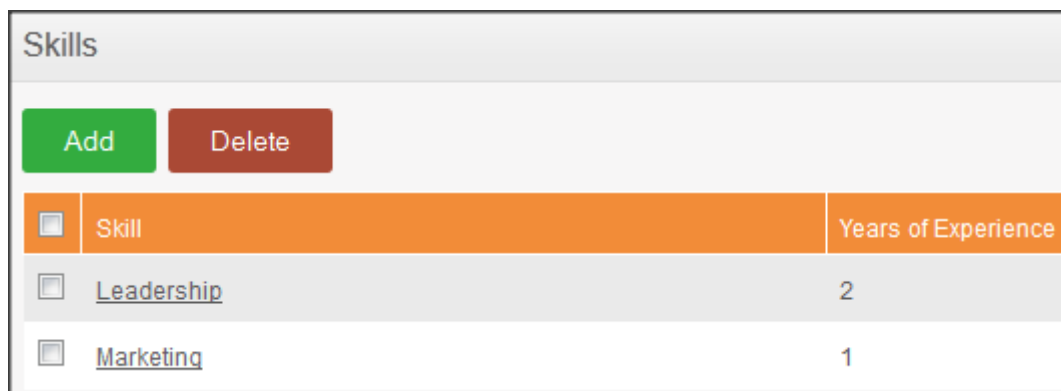
The 'Add Skill' form contains the following fields:

- Skill ***: A dropdown menu with 'Leadership' selected.
- Years of Experience**: A text input field containing the number '2'.
- Comments**: A text area containing the text 'Team leadership'.

At the bottom of the form, there are two buttons: a green 'Save' button and a grey 'Cancel' button. A small asterisk and the text '* Required field' are located below the 'Skill' field.

Figure 8.7: Add Skill

Click “Save” once all the fields are entered and the particular work experience will be listed as shown in Figure 8.8.



Skills	
<input type="checkbox"/>	Leadership
<input type="checkbox"/>	Marketing

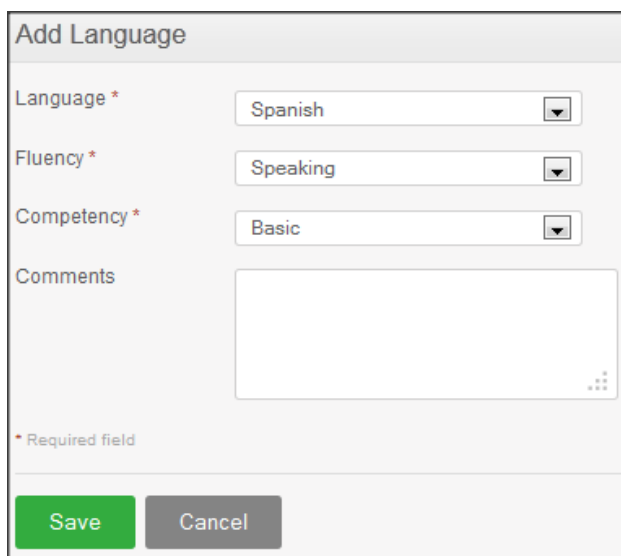
The 'Skills' section includes an 'Add' button (green) and a 'Delete' button (red) at the top. Below is a table with two columns: 'Skill' and 'Years of Experience'. The table contains two entries: 'Leadership' with 2 years of experience and 'Marketing' with 1 year of experience. Each row has a checkbox on the left.

Figure 8.8: Skills

You may enter multiple entries of skills. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

➤ **Languages**

You can enter the various languages that your employees are competent in, with the level of competency. To enter an employee’s language of competency, select “Qualification” under the Employee Details column and click “Add” under “Language” and the screen as shown in Figure 8.9 will appear.



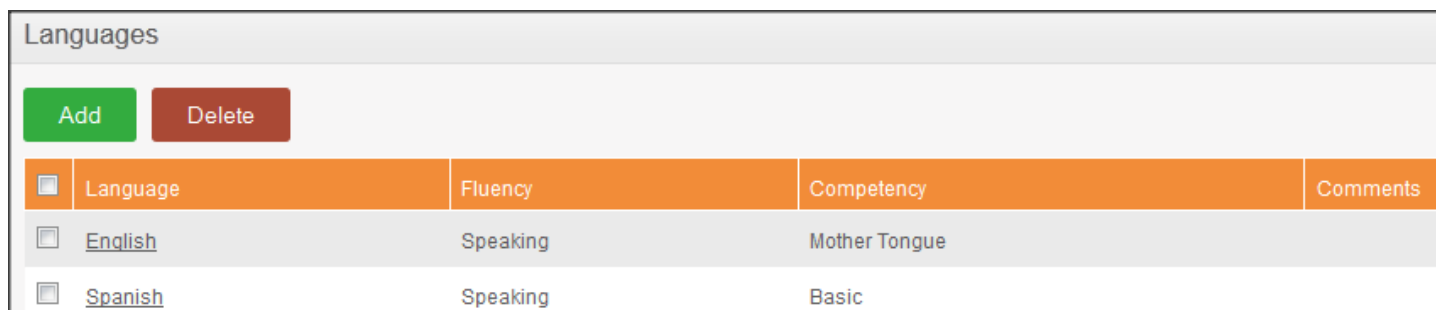
The form titled "Add Language" contains the following fields:

- Language ***: A dropdown menu with "Spanish" selected.
- Fluency ***: A dropdown menu with "Speaking" selected.
- Competency ***: A dropdown menu with "Basic" selected.
- Comments**: A text area for entering additional information.

At the bottom of the form are two buttons: a green "Save" button and a grey "Cancel" button. A small asterisk with the text "* Required field" is located below the input fields.

Figure 8.9: Add Language

Click “Save” once all the fields are entered and the particular work experience will be listed as shown in Figure 9.0.



Languages				
<input type="button" value="Add"/>		<input type="button" value="Delete"/>		
<input type="checkbox"/>	Language	Fluency	Competency	Comments
<input type="checkbox"/>	English	Speaking	Mother Tongue	
<input type="checkbox"/>	Spanish	Speaking	Basic	

Figure 9.0: Languages

You may enter multiple entries of languages. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

➤ License

Here you can enter the licenses an employee can have. To enter an employee’s licenses, select “Qualification” under the Employee Details column and click “Add” under “License” and the screen as shown in Figure 9.1 will appear.

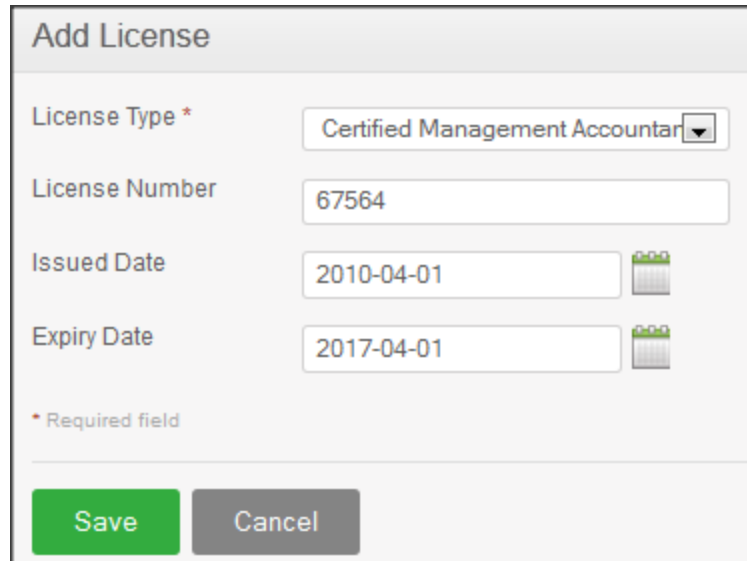
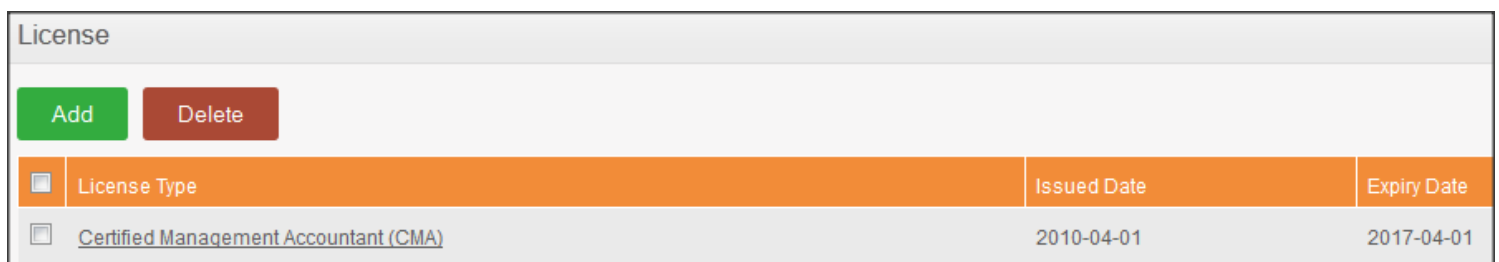


Figure 9.1: Add License

Click “Save” once all the fields are entered and the particular work experience will be listed as shown in Figure 9.2.



License			
<input type="button" value="Add"/>		<input type="button" value="Delete"/>	
<input type="checkbox"/>	License Type	Issued Date	Expiry Date
<input type="checkbox"/>	Certified Management Accountant (CMA)	2010-04-01	2017-04-01

Figure 9.2: Licenses

You may enter multiple entries of licenses. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

➤ Attachments

Supporting documents of a particular employee that might be needed by the management can be attached here. For example you can attach documents like personal profile, certificates or the resume of an employee.

Please note that each document cannot exceed 1 megabyte, but you can attach more than one document. To attach click “Browse” select the file and click Upload” to upload it, as shown in Figure 9.3.

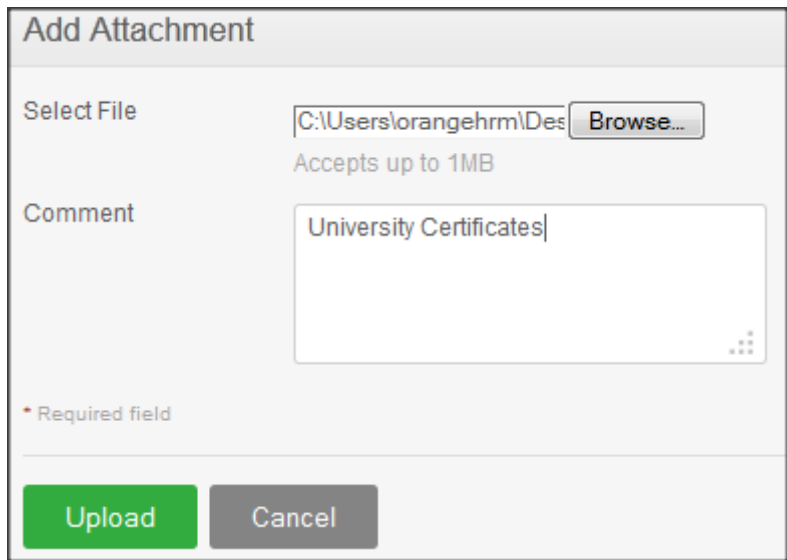
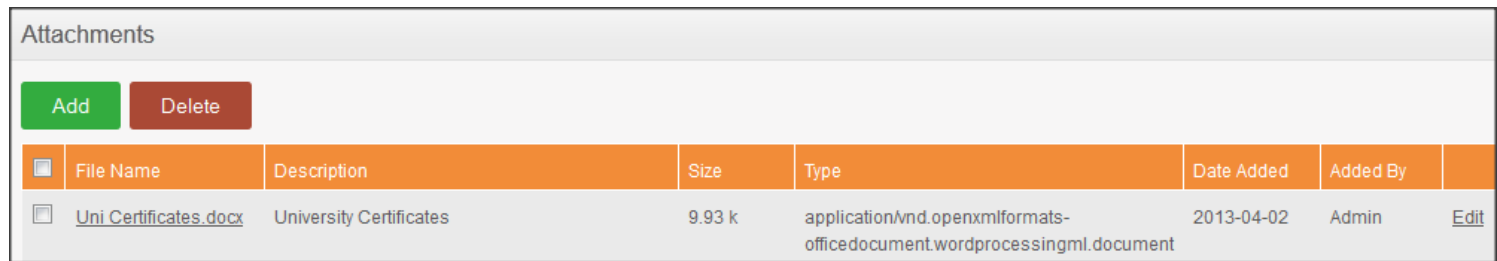


Figure 9.3: Add Attachments

Once you have uploaded the file, the file will be listed as shown in Figure 9.4.



Attachments						
Add		Delete				
<input type="checkbox"/>	File Name	Description	Size	Type	Date Added	Added By
<input type="checkbox"/>	Uni Certificates.docx	University Certificates	9.93 k	application/vnd.openxmlformats-officedocument.wordprocessingml.document	2013-04-02	Admin
						Edit

Figure 9.4: Manage Attachments

To delete an entry click on the check box next to the particular entry and click “Delete”. Multiple selections can be deleted simultaneously.

Membership

If employees are members of any committee, institute etc. those details can be entered here. To enter employee’s membership details, select “Membership” from the Employee Details column and click “Add” and the screen as shown in Figure 9.5 will appear.

Add Membership

Membership * Association for Financial Professi

Subscription Paid By Company

Subscription Amount 4000

Currency United States Dollar

Subscription Commence Date 2013-01-01

Subscription Renewal Date 2013-12-31

* Required field

Save
Cancel

Figure 9.5: Add Membership Details

Click “Save” once all the fields are entered and the particular work experience will be listed as shown in Figure 9.6.

Assigned Memberships

Add
Delete

Membership	Subscription Paid By	Subscription Amount	Currency	Subscription Commence Date	Subscription Renewal Date
<input type="checkbox"/> Association for Financial Professionals (AFP)	Company	4000.00	USD	2013-01-01	2013-12-31
<input type="checkbox"/> Association of International Accountants (AIA)	Company	1500.00	USD	2012-01-01	2013-12-31

Attachments

Add

Figure 9.6: Assigned Memberships

You may enter multiple entries of memberships. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and upload the following file by clicking “Upload”.

7.0 Leave Module

A comprehensive leave management module with extensive possibilities of defining leave types, company holidays, applying for and assigning of leave for the employees of the company. It caters for all application and approval processes and is able to display information on leave entitlement, balance, history etc.

The functionality of the Leave Module differs depending on the rights of the user. The Leave Module will be described from the perspective of an administrator, an ESS User who is a supervisor and the normal ESS user.

The Admin can:

- View Leave Entitlements for each employee and entitle leave days of each available type
- Generate Leave Entitlements and Usage Reports for himself/herself and all employees
- Configure leave periods, leave types, work week and holidays
- Assign Leave for any employee
- See Scheduled Leave for any employee
- See list of Taken Leave for any employee
- If the admin user is an employee then he will see the 'Apply' 'My Leave' and 'Entitlements' options along with the rest of the features.

A Supervisor can:

- View the Personal or Employee (subordinate) Leave Entitlements
- Generate Leave Entitlements and Usage Reports for himself/herself and his/her subordinates
- View the Leave List
- Apply Leave
- Assign Leave for his/her subordinates
- Approve/Reject Leave for his/her subordinates

The ESS User can:

- View the Personal Leave Entitlement
- Generate Leave Entitlements and Usage Reports for himself/herself
- View the detailed leave information
- Apply for leave

7.1 Configure

The HR admin is able to configure the following that will be reflected throughout the Leave Module as shown in Figure 9.7.

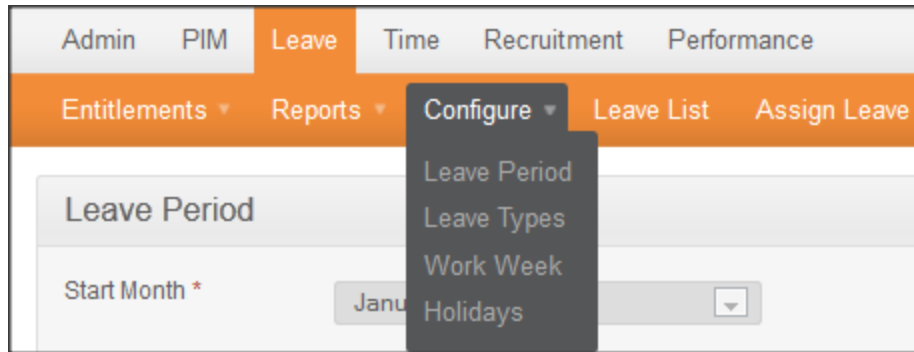
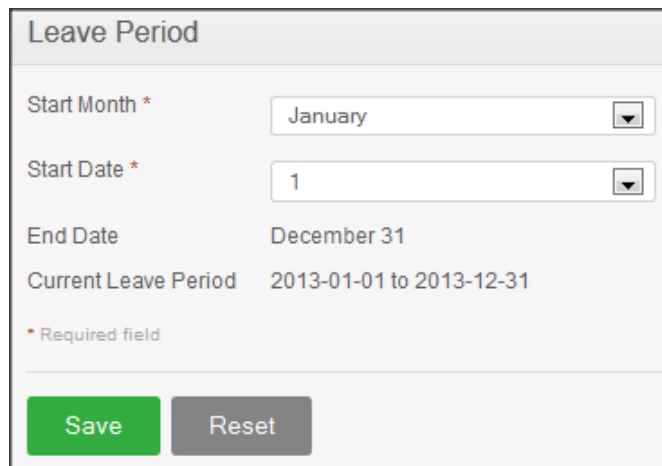


Figure 9.7: Configure

- Leave Period
- Leave Types
- Work Week
- Holidays

Leave Period

The HR Admin and other users with admin rights are able to define the leave period that will be used when applying/assigning leave. To define a leave period, go to **Leave>> Configure>> Leave Period** and a screen as shown in Figure 9.8 will appear. Click “Edit” to enter fields.



The screenshot shows the 'Leave Period' configuration form. It includes the following fields and values:

- Start Month ***: January
- Start Date ***: 1
- End Date**: December 31
- Current Leave Period**: 2013-01-01 to 2013-12-31

A legend indicates that an asterisk (*) denotes a required field. At the bottom of the form, there are two buttons: a green 'Save' button and a grey 'Reset' button.

Figure 9.8: Define Leave Period

You can define the “Start Month” and “Start Date” from the drop down menus. The system will automatically set the “End Date” as to have a one-calendar year leave period.

Click “Save” and the current leave period will be stated below the “End Date”. This will be the default leave period.

Leave Types

Through this section the admin and any other user with admin rights will be able to define leave types, which are compatible with the HR policies of the company. To add leave types, go to **Leave>> Configure>> Leave Types** and the screen as shown in Figure 9.9 will appear.

Click “Add” to enter a field. Once the field is added, click “Save”.

By clicking the “Is Entitlement Situational” option, that leave type will be excluded from reports unless there is some activity. e.g. maternity leave, jury duty leave.

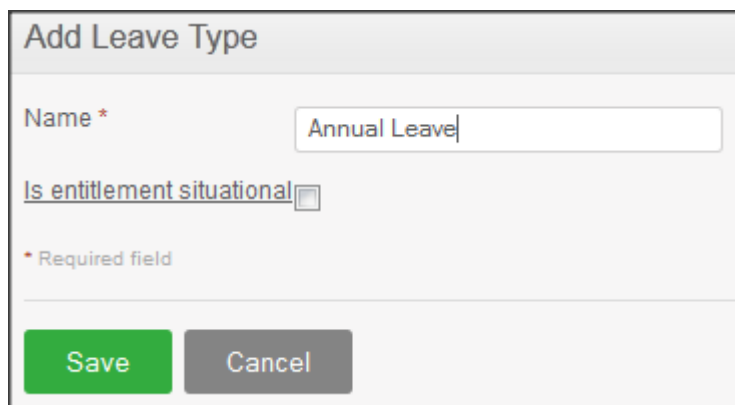


Figure 9.9: Add Leave Type

Once a leave type is added, it will be listed as shown in Figure 10.0. You may add multiple entries of leave types. You may view/edit leave type by clicking on the “Leave Type” name.

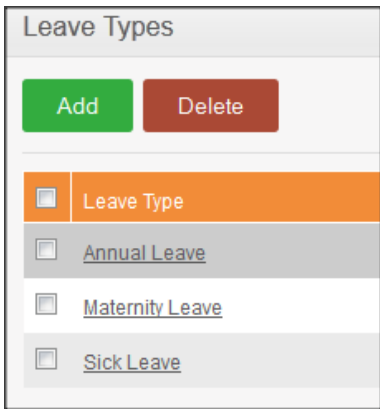


Figure 10.0: Leave Types List

To delete a leave type, click on the check box next to the “Leave Type” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Work Week

The HR Admin and any other users with admin rights will be able to define the work weeks for all employees. To define work week, go to **Leave>> Configure>> Work Week** and the screen as shown in Figure 10.1 will appear.

Click “Edit” to define the work week.

In this feature, you can define the days that the company operates whether they are; Full Day, Half Day, Non-Working Day.

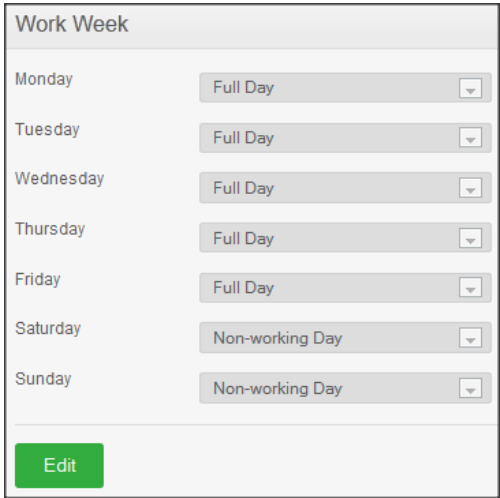


Figure 10.1: Define Work Week

Click “Save” once you have configured the work week settings.

Holidays

The HR admin and other users with admin rights can define holidays that will be applicable to the entire company and will be taken into consideration while calculating leave duration.

To define “Holidays”, go to **Leave>> Configure>> Holidays** and click “Add”, a screen as shown in Figure 10.2 will appear.

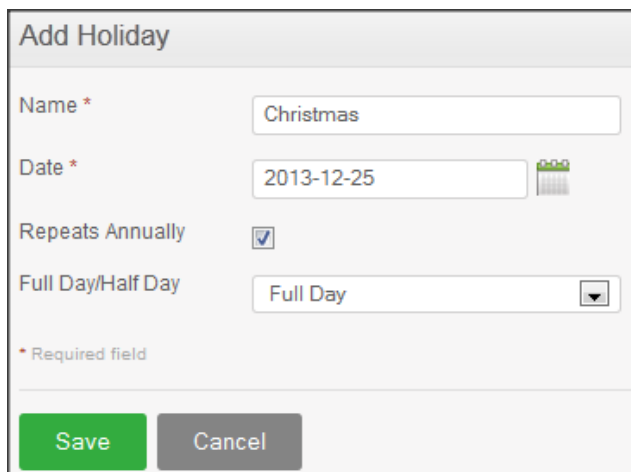


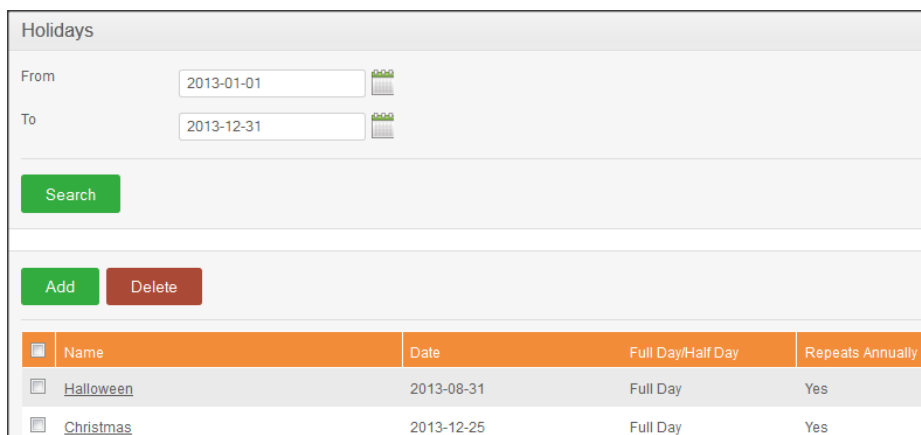
Figure 10.2: Add Holiday

Enter the “Name of the Holiday”, the “Date” it will occur and checking the “Repeats Annually” will mean that the holiday will occur on the same date in the following years and select whether the holiday stated will be considered as a “Full Day /Half Day” holiday.

Click “Save” once you have defined the holiday.

Once a holiday is added, it will be listed as shown in Figure 10.3.

You also have the option to also “Search” for the holidays that are occurring for a particular leave period.



Holidays			
From	2013-01-01		
To	2013-12-31		
Search			
Add Delete			
Name	Date	Full Day/Half Day	Repeats Annually
Halloween	2013-08-31	Full Day	Yes
Christmas	2013-12-25	Full Day	Yes

Figure 10.3: Holiday List

You may add multiple entries of holidays. You may view/edit holidays by clicking on the “Holiday” name. To delete a holiday, click on the check box next to the “Holiday” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

7.2 Leave Entitlements

This feature allows users to add (Admin Users only) and view employee leave entitlements. The menu will show data depending on the user type:

- **Admin:** will see “Add Entitlements” and “Employee Entitlements” and has full rights.
- **ESS User-Supervisor:** will see “Employee Entitlements” (subordinates only) and “My Entitlements” and has viewing rights only.
- **ESS User:** will see “My Entitlements” and has viewing rights only.

HR Admin View of Leave Entitlements

This feature enables the HR Admin and other users with admin rights to Add and View Leave Entitlements for each leave type for all employees.

To add an entitlement to employees, click on **Leave>>Entitlements>>Add Entitlements** and the screen shown in Figure 10.4 will appear.

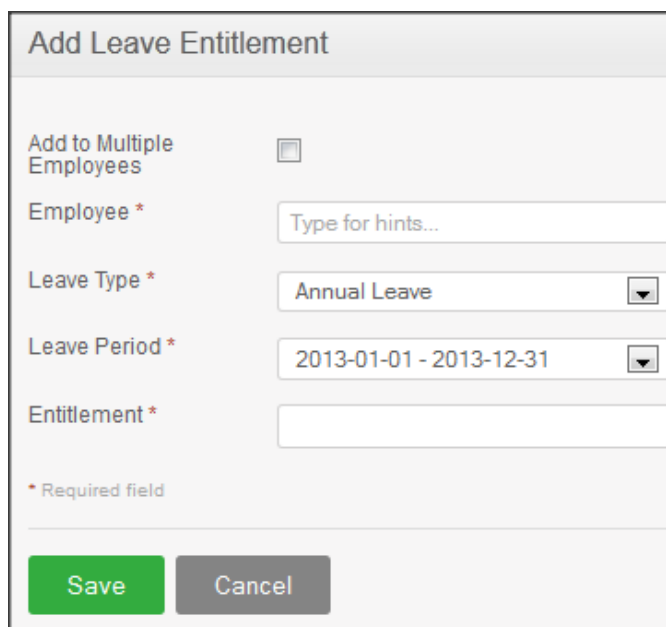
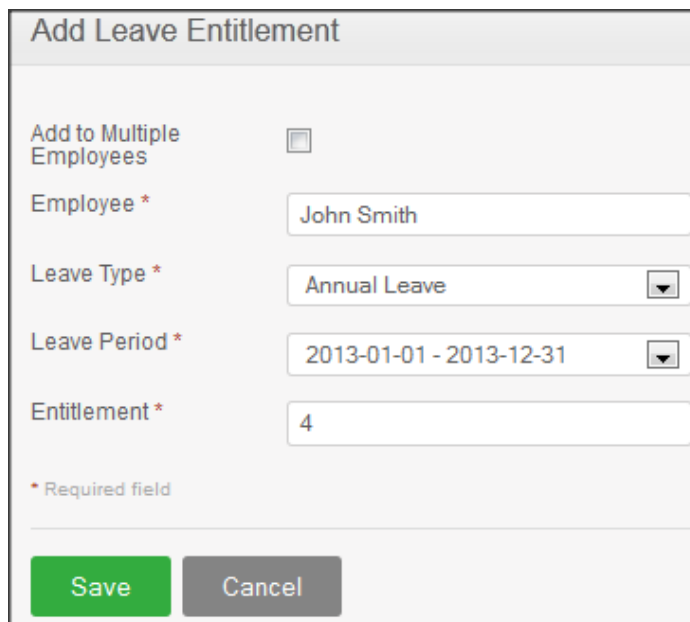


Figure 10.4: Add Leave Entitlement

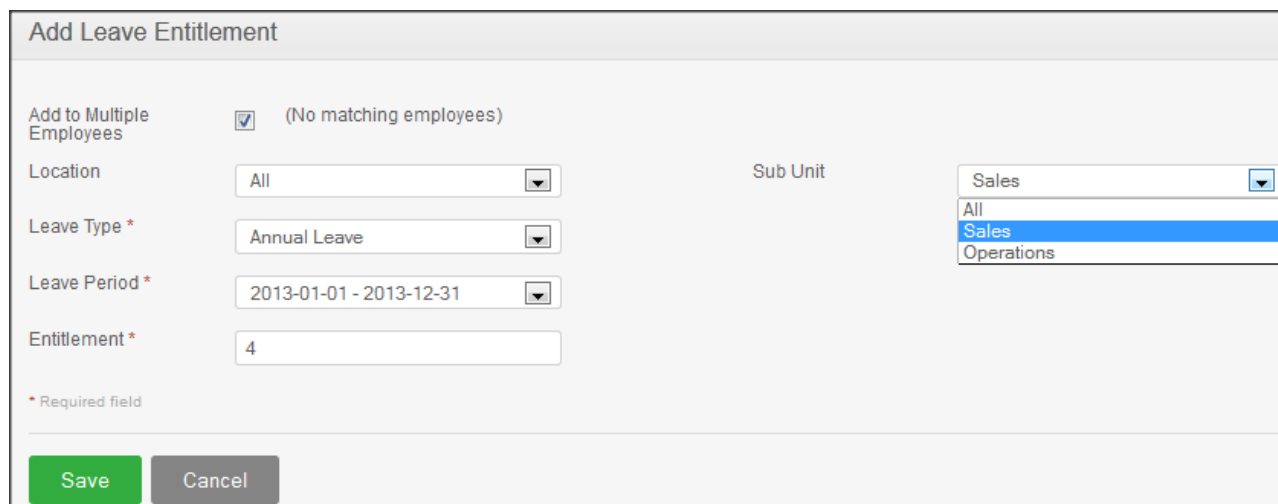
The HR Admin can select the employee to assign leave to by typing his/her name in the “Employee” textbox. The “Leave Type” (defined under Configure>>Leave Types) can then be selected from the dropdown menu. The “Leave Period” can then be selected. The number of days to assign to that employee can then be given in the “Entitlement” textbox, as shown in Figure 10.5.



The screenshot shows a form titled "Add Leave Entitlement". At the top left, there is a checkbox labeled "Add to Multiple Employees" which is currently unchecked. Below this, the "Employee *" field contains the text "John Smith". The "Leave Type *" dropdown menu is set to "Annual Leave". The "Leave Period *" dropdown menu shows the date range "2013-01-01 - 2013-12-31". The "Entitlement *" field contains the number "4". A legend indicates that fields with an asterisk are required. At the bottom, there are two buttons: a green "Save" button and a grey "Cancel" button.

Figure 10.5: Add Leave Entitlement to an employee

If the Admin selects “Add to Multiple Employees”, then the “Employee” field gets replaced with a “Location” and “Sub Unit” field. The Admin can now select a specific location and a sub-unit, and assign a leave entitlement for a certain “Leave Type” to all employees in that location and sub-unit by clicking “Save”, as shown in Figure 10.6.



The screenshot shows the "Add Leave Entitlement" form with the "Add to Multiple Employees" checkbox checked. Next to the checkbox, it says "(No matching employees)". The "Location" dropdown is set to "All". The "Sub Unit" dropdown is open, showing a list with "Sales" selected. The "Leave Type *" dropdown is set to "Annual Leave". The "Leave Period *" dropdown shows "2013-01-01 - 2013-12-31". The "Entitlement *" field contains "4". A legend indicates that fields with an asterisk are required. At the bottom, there are two buttons: a green "Save" button and a grey "Cancel" button.

Figure 10.6: Add Leave Entitlement to Employees by Location and Sub-Unit

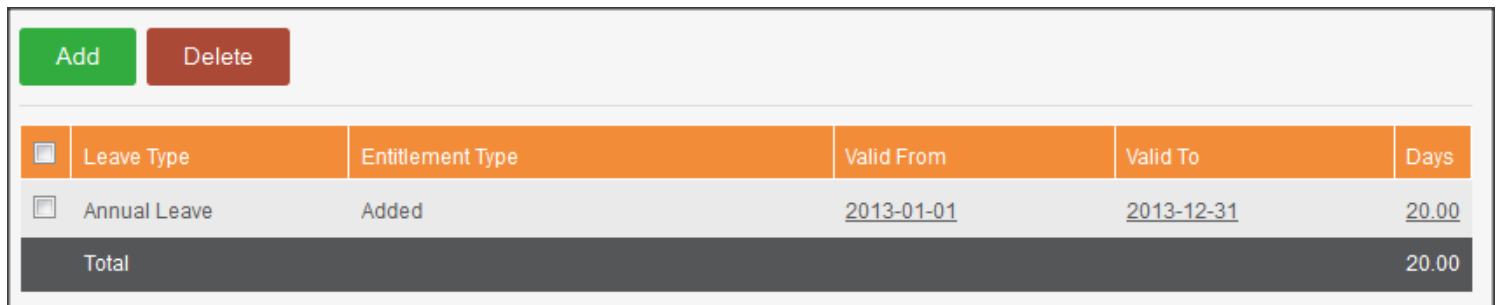
To view an employee’s leave entitlement, the HR Admin can click on **Leave>>Entitlements>>Employee Entitlements** as shown in Figure 10.7. The Admin can type in the Employee name and select the “Leave Type” from the drop down as well as the “Leave Period”.



Figure 10.7: Search Employee Entitlements

Clicking “Search” will pull up all the leave that that particular employee has been entitled, as shown in Figure 10.8. Clicking “Add” will bring up the “Add Leave Entitlement” window (as shown in Figure 10.4).

To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.



<input type="checkbox"/>	Leave Type	Entitlement Type	Valid From	Valid To	Days
<input type="checkbox"/>	Annual Leave	Added	2013-01-01	2013-12-31	20.00
Total					20.00

Figure 10.8: View Employee Entitlement

To edit the leave entitlement, click on the number of days entitled under “Days”, or the date under “Valid From” or “Valid To” and the window as shown in Figure 10.9 will appear.

The Admin will only be able to change the “Leave Period” and the “Entitlement”. Click “Save” once the values have been changed.

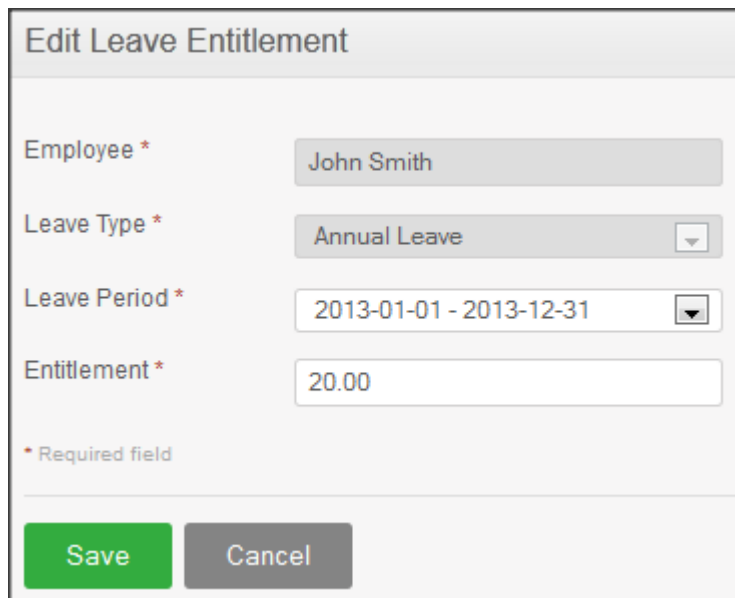


Figure 10.9: Edit Employee Entitlement

ESS Supervisor View of Leave Entitlements

An ESS –Supervisor is only able to “View” his own leave entitlement (**Leave>>Entitlements>>My Entitlements**) and his subordinates leave entitlements (**Leave>>Entitlements>>Employee Entitlements**) when he/she logs in (Figure 11.0).

***Note:** An HR Admin will enter the leave entitlement on behalf of an ESS-Supervisor and an ESS-Employee.

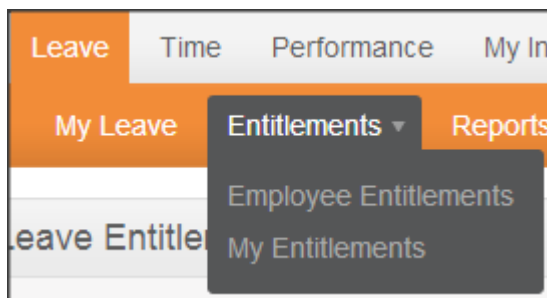


Figure 11.0: ESS-Supervisor Entitlements menu

To view his/her own leave entitlement, the ESS Supervisor has to click on **Leave>> Entitlements>> My Entitlements**. He/she can then search by “Leave Type” or “Leave Period”. Clicking “Search” will show all available leave entitlements as shown in Figure 11.1.

My Leave Entitlements

Leave Type: Leave Period:

Leave Type	Entitlement Type	Valid From	Valid To	Days
Annual Leave	Added	2013-01-01	2013-12-31	20.00
Total				20.00

Figure 11.1: ESS-Supervisor- My Entitlements

To view a subordinate's leave entitlement, the Supervisor has to click on **Leave>>Entitlements>>Employee Entitlements** and then type in the name of the subordinate under "Employee", and select the "Leave Type" and "Leave Period", as shown in Figure 11.2.

Leave Entitlements

Employee: Leave Type: Leave Period:

Figure 11.2: ESS-Supervisor - Subordinate Entitlement Search

Clicking “Search” will then show the leave that has been entitled to that subordinate, as shown in Figure 11.3.

Leave Entitlements

Employee: Leave Type: Leave Period:

Leave Type	Entitlement Type	Valid From	Valid To	Days
Annual Leave	Added	2013-01-01	2013-12-31	20.00
Total				20.00

Figure 11.3: ESS-Supervisor View of Subordinate Entitlement

ESS-Employee View of Leave Entitlements

An ESS-Employee is only able to “View” his leave entitlement when he/she logs in. To view, go to **Leave>> Entitlements>> My Entitlements** and a screen as shown in Figure 11.4 will appear.

My Leave Entitlements

Leave Type: Leave Period:

Leave Type	Entitlement Type	Valid From	Valid To	Days
Annual Leave	Added	2013-01-01	2013-12-31	20.00
Total				20.00

Figure 11.4: ESS-Employee View of Leave Entitlements

7.3 Reports

This feature allows users to generate Leave Entitlements and Usage Reports of employees. The HR Admin can select between two main criteria when generating reports: “Leave Type” and “Employee”. (Figure 11.5.1).

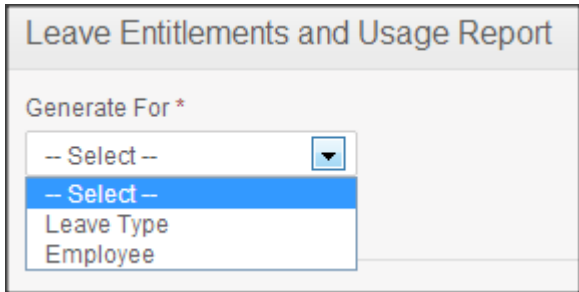


Figure 11.5.1: Generate Reports For

If the HR Admin selects “Leave Type”, he will then be presented with the following fields to select from (Figure 11.5.2).

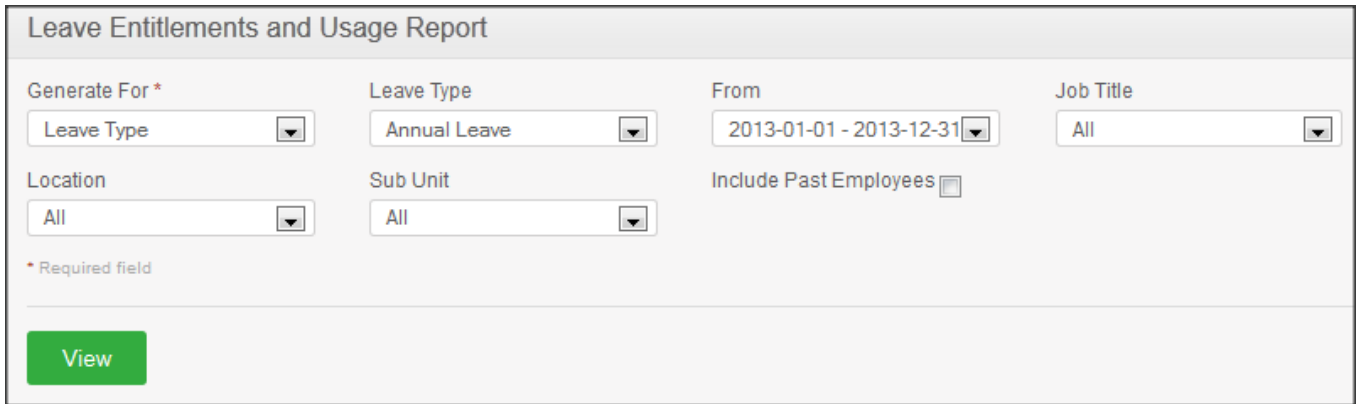


Figure 11.5.2: Leave Type Report Generation view

Once the appropriate fields are selected, the Admin can then click “View” and will be presented with the leave report of all employees based on the previously selected criteria (Figure 11.6)

Employee	Leave Entitlements (Days)	Leave Pending Approval (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days)
James Olsen	20.00	0.00	0.00	0.00	20.00
Kevin Ryan	20.00	2.33	1.00	3.00	13.67
John Smith	20.00	0.00	0.00	0.00	20.00

Figure 11.6 Employee Leave Report

If the “Employee” option is selected under “Generate For” (Figure 11.5.1) the HR Admin can generate the leave entitlement and usage report for any employee. The name of the employee will need to be inserted into the “Employee” field, and a report will be generated for that employee (as shown in Figure 11.7).

Leave Entitlements and Usage Report

Generate For * Employee * From

Employee ▼ James Olsen 2013-01-01 - 2013-12-31 ▼

* Required field

View

Leave Type	Leave Entitlements (Days)	Leave Pending Approval (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days)
Annual Leave	<u>20.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	20.00
Sick Leave	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	0.00

Figure 11.7: Leave Entitlements and Usage Report of a single employee

The Admin user can see view the Leave Entitlements and Usage Report of all employees, as well as himself/herself if he/she is also an employee. ESS –Supervisor users can view the Leave Entitlements and Usage Reports of only his/her subordinates, as well as for themselves (**Leave>>Reports>> My Leave Entitlements and Usage Report**)

If an employee is an Admin user or ESS Supervisor or then he/she will see an extra menu item under **Leave>>Reports** called **My Leave Entitlements and Usage Report (Figure 11.8)**

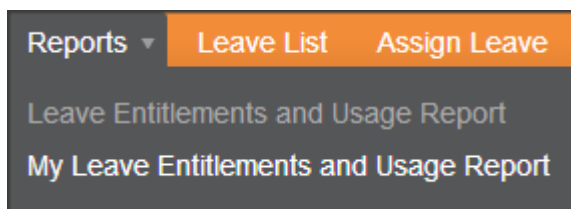


Figure 11.8: Admin Employee and ESS Supervisor menu view

The user can select the Leave Period under the “From” dropdown menu, and then click on “View”. The following screen will appear as shown in Figure 11.9.

My Leave Entitlements and Usage Report

From

2013-01-01 - 2013-12-31 ▾

2013-01-01 - 2013-12-31

2014-01-01 - 2014-12-31

View

Leave Type	Leave Entitlements (Days)	Leave Pending Approval (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days)
Annual Leave	<u>20.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	20.00
Sick Leave	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	0.00

Figure 11.9: My Leave Entitlements and Usage Report

If the user is an ESS User, then he will see the following menu (Figure 12.0).

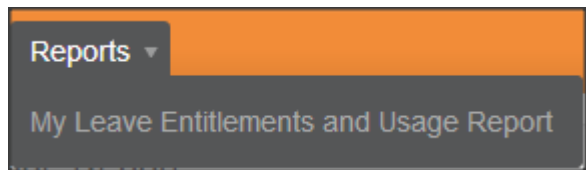


Figure 12.0: ESS User menu view

The ESS user can then select the “Leave Period” under the “From” dropdown menu and can then click on “View” (as shown in Figure 12.1).

My Leave Entitlements and Usage Report					
From					
2013-01-01 - 2013-12-31					
* Required field					
View					
Leave Type	Leave Entitlements (Days)	Leave Pending Approval (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days)
Annual Leave	20.00	2.33	1.00	3.00	13.67
Sick Leave	0.00	0.00	0.00	0.00	0.00

Figure 12.1: My Leave Entitlements and Usage Report

7.4 Leave List

The leave list is available to the Admin and ESS – Supervisors. It shows the entire leave request by the employees.

***Note:** The ESS – Supervisor will only see the leave list of his subordinates while the Admin can view the entire list.

View/Action Leave Request

When an employee applies for a leave his Supervisor (and Admin as well, if configured under Notifications) will receive a mail with a link to the leave list and upon clicking on that link either the Supervisor or the Admin can approve, reject or cancel the leave.

Alternatively, an HR Admin or an ESS-Supervisor may also log into the system and action the following leave requests.

To view “Leave List”, go to **Leave>>Leave List** and the screen as shown in Figure 12.2 will appear. You may also action the following leave request by selecting an action from the “Action” drop down menu.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
2013-04-03 to 2013-04-05	Kevin Ryan	Annual Leave	17.00	3.00	Pending Approval(3.00)		Select Action <input type="button" value="v"/> Select Action Approve Cancel Reject

Save

Figure 12.2: Admin/ESS Supervisor Leave List

Click “Save” once an action has been selected. The following leave request in which an action has been applied will no longer appear in the leave list as shown in Figure 12.3. A mail will be then sent to the employee and he can view the status of his leave application.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
No Records Found							

Save

Figure 12.3: Leave Status Notified to Employee.

Alternatively, you may action the following leave request by selecting an action from the drop down menu of “Actions” or you may click the “Date” / “Status” to view the a detailed information of the leave request and action them individually as shown in Figure 12.4. Select necessary actions to the leave request and click “Save”

Leave Request (2013-04-17 to 2013-04-19) Kevin Ryan

[View Leave Request Comments](#)

Date	Leave Type	Leave Balance (Days)	Duration (Hours)	Status	Comments	Actions
2013-04-17	Annual Leave	14.00	9.00	Pending Approval		Select Action <input type="button" value="v"/>
2013-04-18	Annual Leave	14.00	9.00	Pending Approval		Select Action <input type="button" value="v"/>
2013-04-19	Annual Leave	14.00	9.00	Pending Approval		Select Action <input type="button" value="v"/> Select Action Approve Cancel Reject

Save Back

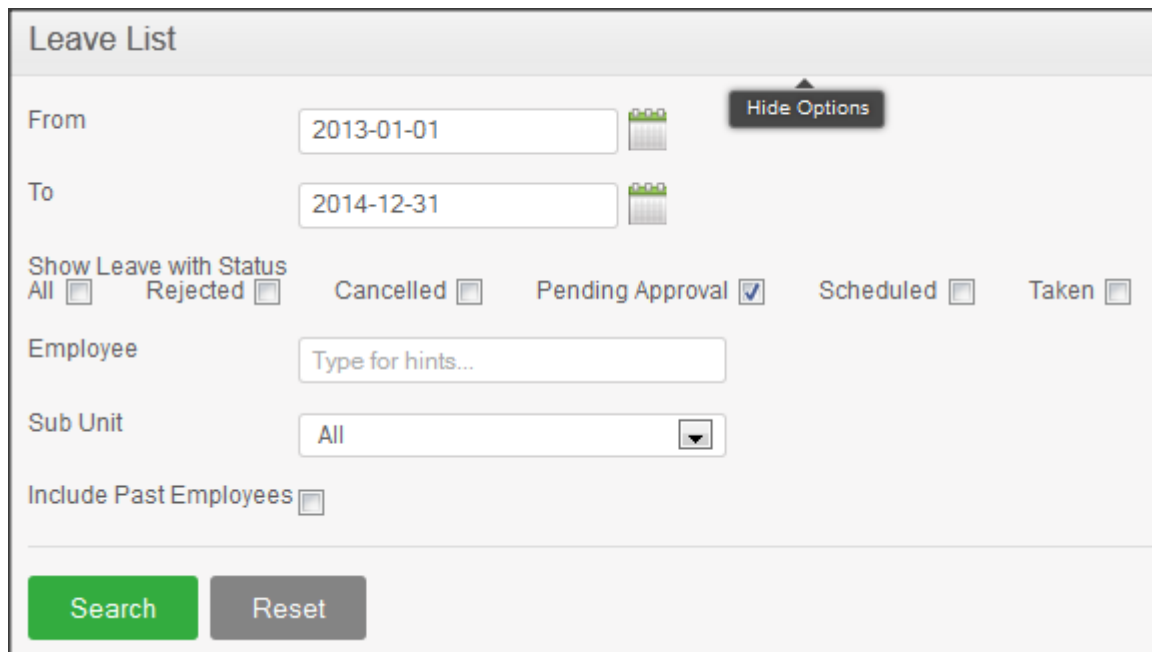
Figure 12.4: Leave Request in Detail

Once the necessary actions have been made to the leave requests, they will no longer appear in the leave list. A mail will be then sent to the employee and he can view the status of his leave application.

Search Leave List

You can view leave using the search toolbar as shown in Figure 12.5 by:

- Specifying the period using the “From” and “To” dates
- Selecting the status or combination of status of the following:
 - Rejected
 - Canceled
 - Pending Approval
 - Approved
 - Taken
- Search for the employee
- Search by Sub-Unit
- You may also include past employees with your search.



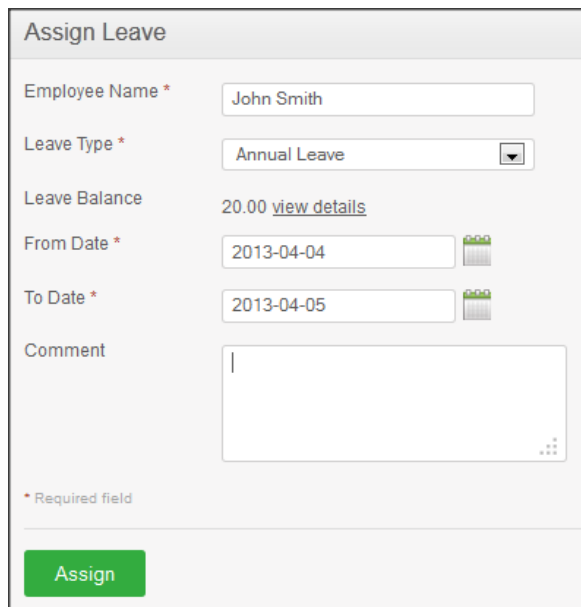
The screenshot shows a search toolbar for the 'Leave List'. It includes the following elements:

- From:** A date input field containing '2013-01-01' with a calendar icon to its right.
- To:** A date input field containing '2014-12-31' with a calendar icon to its right.
- Show Leave with Status:** A row of checkboxes for 'All', 'Rejected', 'Cancelled', 'Pending Approval' (which is checked), 'Scheduled', and 'Taken'.
- Employee:** A text input field with the placeholder text 'Type for hints...'.
- Sub Unit:** A dropdown menu currently showing 'All'.
- Include Past Employees:** A checkbox that is currently unchecked.
- Buttons:** A green 'Search' button and a grey 'Reset' button at the bottom left. A 'Hide Options' button is located at the top right.

Figure 12.5: Leave List Search

7.5 Assign Leave

This feature is only available to an HR Admin and ESS-Supervisor. The HR Admin can assign leave to all employees while an ESS-Supervisor can only assign leave to his subordinates. To assign leave, go to **Leave>> Assign Leave** and the screen as shown in Figure 12.6 will appear.



The screenshot shows a web form titled "Assign Leave". It contains the following fields and values:

- Employee Name *: John Smith
- Leave Type *: Annual Leave
- Leave Balance: 20.00 [view details](#)
- From Date *: 2013-04-04
- To Date *: 2013-04-05
- Comment: (empty text area)

At the bottom of the form is a green "Assign" button. A legend indicates that an asterisk (*) denotes a required field.

Figure 12.6: Assign Leave

Select the name of the employee, you can do this by entering the first letter of his name and you will see list of employees with that letter and you can select the relevant employee, then select the leave type, the dates in which the leave is to be taken and you can add a comment if necessary. The system also shows the remaining leave balance for the specific leave type.

Click "Assign" when you are done and the employee and the admin will be notified via e-mail. The leave balance will also be deducted.

When the employee logs in to the system and checks his/her leave by going to **Leave>> My Leave**, he/she will see the leave that was assigned to him/her as shown in Figure 12.7.



Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
2013-04-17 to 2013-04-19	Kevin Ryan	Annual Leave	14.00	3.00	Pending Approval(3.00)		Select Action <input type="button" value="v"/>
2013-04-03 to 2013-04-05	Kevin Ryan	Annual Leave	14.00	3.00	Taken(3.00)		

Figure 12.7: ESS-Employee “My Leave” View

7.6 My Leave

This menu item is available for ESS Users and ESS Supervisors. Personal leave details can be viewed here. To view “My Leave” go to **Leave>> My Leave** and the screen as shown in Figure 12.8 will appear.



Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
2013-04-17 to 2013-04-19	Kevin Ryan	Annual Leave	14.00	3.00	Pending Approval(3.00)		Select Action <input type="button" value="v"/>
2013-04-03 to 2013-04-05	Kevin Ryan	Annual Leave	14.00	3.00	Taken(3.00)		

Figure 12.8: My Leave View

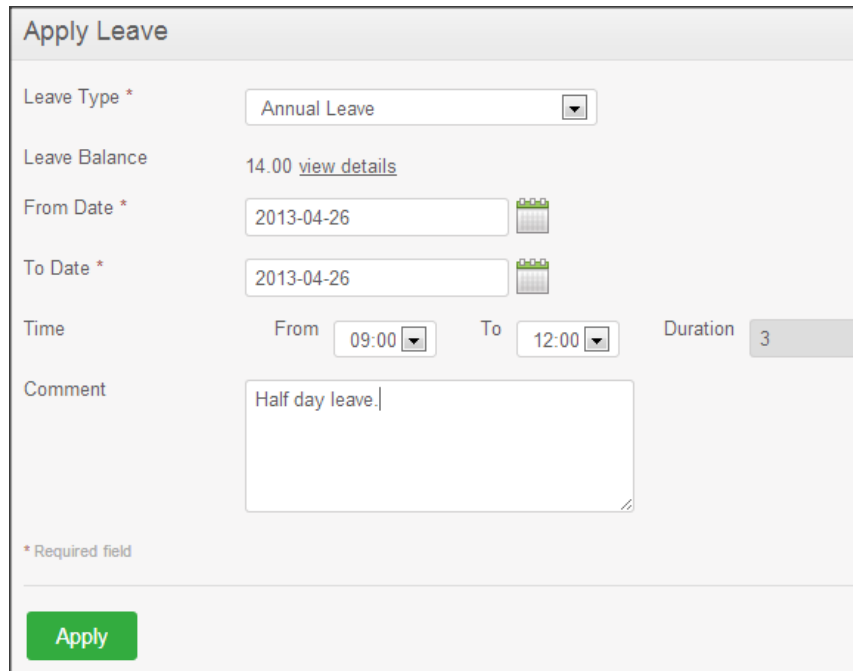
An employee can choose to cancel a pending approval leave or a scheduled leave however he cannot make any changes to any other leave status.

He/she can view complete details of leaves by clicking on the “Date” or “Status”. To cancel a leave request click on the “Actions” drop down, select “Cancel” and click “Save”.

If the email notifications functionality has been configured (see section 5.6 for more information), email notifications on leave application, cancellations, rejections and approvals will be sent to the employee who has applied for leave, as well as to the Admin Users who have subscribed for the leave management mail notifications.

7.7 Apply

All users except for the Admin unless he is an employee can apply leave from this option. To apply for a leave go to **Leave>>Apply** and the screen shown as shown in Figure 12.9 will appear.



The screenshot shows the 'Apply Leave' form with the following details:

- Leave Type ***: Annual Leave
- Leave Balance**: 14.00 [view details](#)
- From Date ***: 2013-04-26
- To Date ***: 2013-04-26
- Time**: From 09:00 To 12:00
- Duration**: 3
- Comment**: Half day leave.

* Required field

Apply

Figure 12.9: Apply Leave

Select the leave type from the drop down menu and the “From Date” and “To Date” you require the leave, once you select the dates you will see the “From Time”, “To Time” and “Total Hours”. You can enter the times and the “Total Hours” would automatically populate. The “Leave Balance” would also appear indicating how may leave balance you have for the particular leave type. You may also add a comment on why you need the leave.

Once you have filled in the details click “Apply” and a mail will be sent to the Supervisor (as well as the Admin, if configured under Notifications) for approval. The status of your leave application can be seen in “My Leave” as shown in Figure 13.0.




Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
2013-04-26	Kevin Ryan	Annual Leave	13.67	0.33	Pending Approval(0.33)	Half day leave. 	Select Action <input type="button" value="v"/>
2013-04-17 to 2013-04-19	Kevin Ryan	Annual Leave	13.67	3.00	Pending Approval(2.00) Scheduled(1.00)		Go to Detailed View
2013-04-03 to 2013-04-05	Kevin Ryan	Annual Leave	13.67	3.00	Taken(3.00)		

Figure 13.0: My Leave View

8.0 Time Module

The Time Module automates attendance maintenance and punch in/out. The functionality of the module allows the employees of the company to create and submit weekly timesheets and the Supervisors to modify, approve and reject the timesheets. These timesheets are created based on Activities within Projects that are being done for various Customers.

While attendance is tracked through punch in/out employees can specify the time spent of projects assigned to them.

Depending on each user the functions vary:

The Admin can:

- Add Project Information; Customers, Projects and Activities
- View / Edit / Approve / Reject Employee Timesheets
- View any employee's attendance records
- Configure attendance settings for all employees
- View project reports for any project undertaken by the company

The ESS-Supervisor can:

- View project information, and view/edit/add project activities if he/she is the project admin.
- Enter, modify and submit personal timesheets
- View / Edit / Approve / Reject/Add timesheets of his subordinates

- Enter his/her punch in/out time
- Enter time events spent on the project activities
- View his subordinates' employee attendance records.
- View subordinate's project reports and attendance summary.

The ESS User can:

- View project information, and view/edit/add project activities if he/she is the project admin.
- Enter, modify and submit personal timesheets
- Enter punch in/out time
- Enter the time events for the activities of the projects he/she is working on

8.1 Time Sheets

Project Info; Customers, Projects and Activities

Here information regarding projects, customers, project activities and project administrator can be defined, which can be later used for project management activities.

Customers

You can enter details of your customers that can be used to define projects and project activities. To add a customer, go to **Time>> Project Info>> Customers** and click "Add", a screen as shown in Figure 13.1 would appear.

Click "Save" once the fields are added.

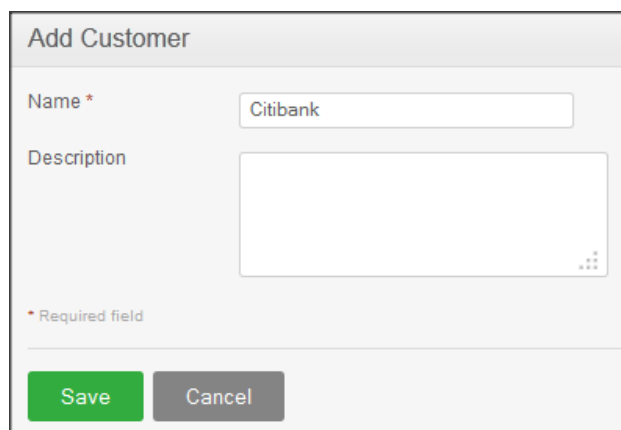


Figure 13.1: Add Customer

The customer will then be listed as shown in Figure 13.2. You may also add multiple entries of customers. To view details of a customer, click on the customer's name.

Customers	
<input type="button" value="Add"/>	<input type="button" value="Delete"/>
<input type="checkbox"/> Customer	Description
<input type="checkbox"/> Citibank	

Figure 13.2: Customers List

To delete an entry, click on the check box next to the “Customer” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Projects

The administrators are able to define the projects, which were/are/will be managed by the company. To add a project, go to **Time>> Project Info>> Projects** and click “Add”, a screen as shown in Figure 13.3 would appear.

Click “Save” once the fields are added.

Add Project

Customer Name * [Add Customer](#)

Name *

Project Admin [Add Another](#)

Description

* Required field

Figure 13.3: Add Project

To add a project, the following needs to be entered:

- **Customer Name:** needs to be defined first before adding a project name or you may simply add a customer by clicking on “Add Customer” below the “Customer Name” field.
- **Name:** Name of the project to be done for the customer
- **Project Admin:** The employee assigned for the project. You may assign more employees for the project.
- **Description:** A brief description of the project.

Once you click “Save” the screen as shown in Figure 13.4 would appear and project activities can be added for the particular project. To add a project activity, Click “Add” and “Save” once the field is added.

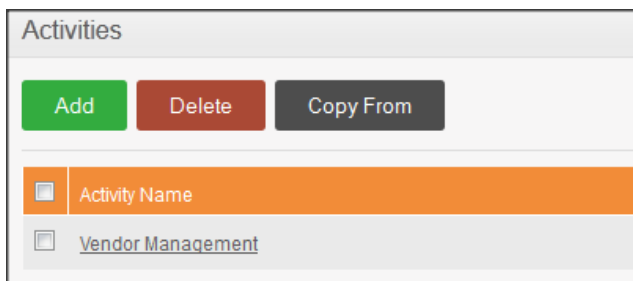


Figure 13.4: Add Project Activities

You may also copy a project activity from another project using the “Copy From” option. To copy a project activity from another project, click “Copy From”, fill in the desired Project name that you wish to copy an activity from, select the required Activity from the list, and then add the activity that needs to be copied by clicking on “Copy” as shown in Figure 13.5.

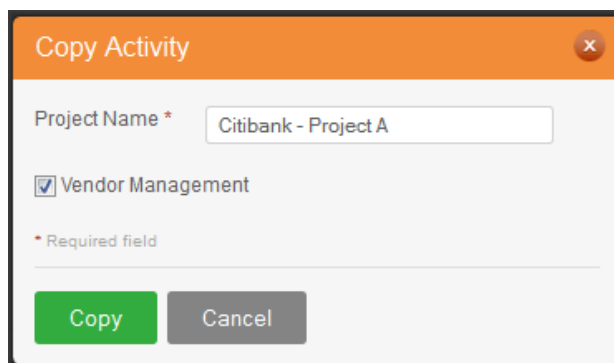


Figure 5.13: Copy Project Activity

The selected project activity will then be added to the list of project activities as shown in Figure 13.6.

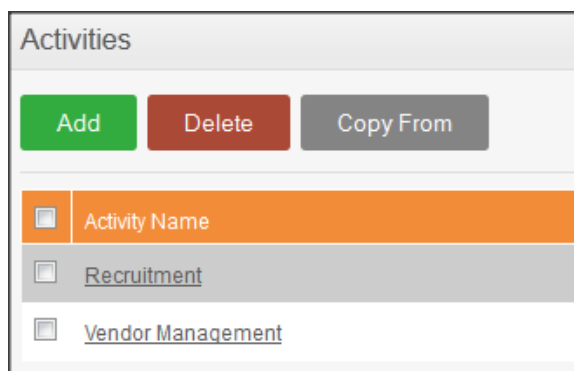


Figure 13.6: Copied Project Activity Listed

A list of projects for a particular customer will then be listed as shown in Figure 13.7. You may also add multiple entries of projects. To delete an entry, click on the check box next to the “Customer” name. It is also

possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

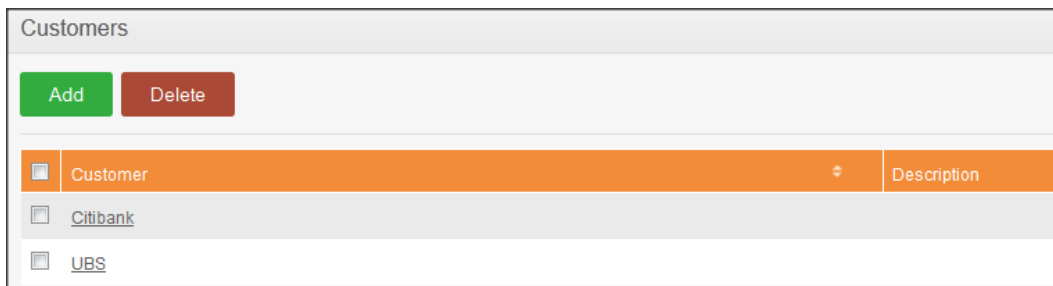


Figure 13.7: Project List

Entering and Submitting a Timesheet

This feature functions in different ways depending on the user type. The Admin will be able to view timesheets of employees while a Supervisor can also do the same and in addition, can enter his timesheet details however, a normal ESS User can only enter his timesheet details.

When an ESS-Employee or an ESS-Supervisor wants to enter his/her timesheet, they can go to **Time>> Timesheet>> My Timesheets** and the screen as shown in Figure 13.8 will appear. This option is not available to the Admin.

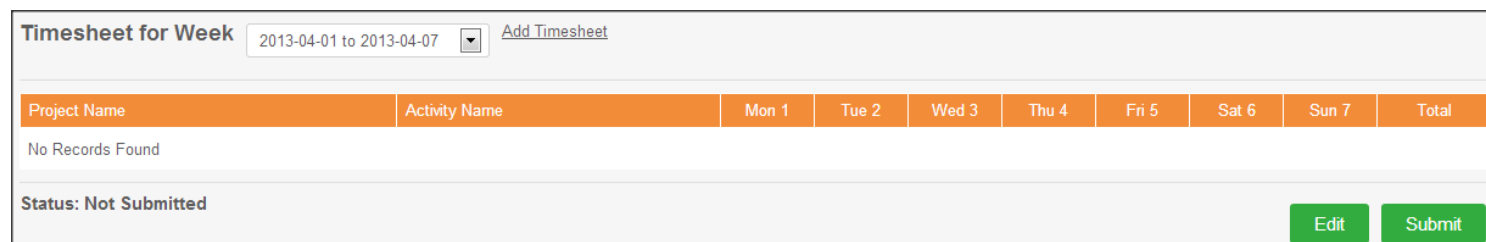


Figure 13.8: Enter Timesheet

The current week will populate under the “Timesheet for week”. You may also add a timesheet for another week period by clicking “Add Timesheet” and another field, “Select a Day to Create Timesheet” will appear in which you can select the first day of the week from the drop down menu and the system will automatically calculate a one-week time period from the date entered as shown in Figure 13.0.

***Note:** Once you have added a timesheet for a specific week, you cannot move from one timesheet of a specific week period to another unless you have entered the details for the current one.

Once you have determined the week period for the timesheet, you can now enter the timesheet details by clicking “Edit” and the screen as shown in Figure 13.9 will appear.

Edit Timesheet for Week 2013-04-01

Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7
<input checked="" type="checkbox"/> Citibank - Project A	Vendor Management	3	4	3	3	4		
<input checked="" type="checkbox"/> UBS - Project B	Recruitment	4	3	4	4	3		

* Deleted project activities are not editable

Figure 13.9: Edit Timesheet

***Note:** Project Info needs to be defined first to enable employees to add a timesheet for the projects he/she was assigned to.

They can select from the “Project Name” and “Activity Name” that was assigned to him/her and enter the number of hours spent for each activity for the whole week. You may also add a row by clicking “Add Row” to enter another timesheet record for another project activity.

Click on the checkbox beside the project name before you click “Save” to save the following records and the screen as shown in Figure 14.0 will appear.

Timesheet for Week 2013-04-01 to 2013-04-07 [Add Timesheet](#)

Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Total
Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00	0:00	0:00	17:00
UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00	0:00	0:00	18:00
Total		7:00	7:00	7:00	7:00	7:00	0:00	0:00	35:00

Status: Not Submitted

Figure 14.0: Save Timesheet

You may also remove a particular record after the timesheet has been saved by clicking “Edit” and the screen as shown in Figure 14.1 will appear. Click on the checkbox for the particular row you want removed and click “Remove Rows” and the record will no longer appear on the timesheet record.

Edit Timesheet for Week 2013-04-01

Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7
<input type="checkbox"/> Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00		
<input checked="" type="checkbox"/> UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00		

* Deleted project activities are not editable

Figure 14.1: Remove Rows

Once the necessary changes have been made, click “Submit” to submit the completed timesheet and you will see the status change from “Not Submitted” to “Submitted” as shown in Figure 14.2

Timesheet for Week 2013-04-01 to 2013-04-07 [Add Timesheet](#)

Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Total
Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00	0:00	0:00	17:00
UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00	0:00	0:00	18:00
Total		7:00	7:00	7:00	7:00	7:00	0:00	0:00	35:00

Status: Submitted

Actions Performed on the Timesheet

Action	Performed By	Date	Comment
Submitted	James Olsen	2013-04-02	

Figure 14.2: Submit Timesheet

The action performed by the user on the timesheet will appear below the screen indicating the “Action” performed, who it was “Performed By” and the “Date” it was performed.

Once the timesheet has been submitted it will be sent to the HR Admin (if the HR Admin has subscribed to the following notification type) and his/her supervisor.

Approving Employee Timesheet

ESS-Supervisor Approve/Reject Timesheet

When an employee submits a time sheet it will be sent to his supervisor. The supervisor will see the submitted timesheets by going to **Time>> Timesheets>> Employee Timesheets** and the screen as shown

in Figure 14.3 will appear. The ESS-Supervisor will only see the timesheets submitted by his/her subordinate.

Select Employee

Employee Name *

* Required field

[View](#)

Timesheets Pending Action

Employee name	Timesheet Period	View
James Olsen	2013-04-01 to 2013-04-07	View

Figure 14.3: ESS Supervisor View Timesheet Details

The supervisor may search and view employee’s timesheet through the “Select Employee” and by entering the employee name and clicking “View”.

Timesheet with pending action can also be viewed on the screen. Click “View” to see the details of the timesheet under “Timesheets Pending Action” and the screen as shown in Figure 14.4 will appear.

Timesheet for James Olsen for Week [Add Timesheet](#)

Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Total
Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00	0:00	0:00	17:00
UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00	0:00	0:00	18:00
Total		7:00	7:00	7:00	7:00	7:00	0:00	0:00	35:00

Status: Submitted [Edit](#)

Timesheet Action

Comment

[Approve](#)
[Reject](#)

Figure 14.4: ESS-Supervisor View/Edit/Approve/Reject Timesheet

The supervisor can approve or reject a timesheet and also enter a comment. They can also edit the timesheet by clicking “Edit”, if there are any discrepancies before approving or rejecting the timesheet.

Once approved or rejected the particular employee will also be updated with the status and the status will change from “Submitted” to either “Approved” or “Rejected”. The action performed by the supervisor will then be listed under “Actions Performed on the Timesheet” as shown in Figure 14.5.

Actions Performed on the Timesheet			
Action	Performed By	Date	Comment
Submitted	James Olsen	2013-04-02	
Approved	Kevin Ryan	2013-04-02	

Figure 14.5: Actions Performed on the Timesheet by ESS-Supervisor

HR Admin Approve/Reject Employee Timesheet

The HR Admin can view all employees’ timesheet. When an employee submits a time sheet, the HR Admin and other users with admin rights can also View / Edit / Approve / Reject an Employee Timesheets. To action an employee timesheet, go to **Time>> Time Sheets>> Employee Time sheets** and the screen as shown in Figure 14.6 will appear.

Select Employee

Employee Name *

* Required field

[View](#)

Timesheets Pending Action

Employee name	Timesheet Period	
Kevin Ryan	2013-04-01 to 2013-04-07	View

Figure 14.6: HR Admin View Timesheet Details

The HR Admin may search and view employee’s timesheet through the “Select Employee” box and by entering the employee name and clicking “View”.

Timesheets with pending action can also be viewed on the screen. Click “View” to see the details of the each timesheet under “Timesheets Pending Action” and the screen as shown in Figure 14.7 will appear.

Timesheet for Kevin Ryan for Week									
		2013-04-01 to 2013-04-07		Add Timesheet					
Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Total
Citibank - Project A	Vendor Management	5:00	6:00	5:00	6:00	6:00	0:00	0:00	28:00
Total		5:00	6:00	5:00	6:00	6:00	0:00	0:00	28:00

Status: Submitted [Edit](#)

Timesheet Action

Comment

[Approve](#) [Reject](#)

Figure 14.7: HR Admin View/Edit/Approve/Reject Timesheet

The HR Admin can approve or reject a timesheet and also enter a comment. They can also edit the timesheet by clicking “Edit”, if there are any discrepancies before approving or rejecting the timesheet.

Once approved or rejected the particular employee will also be updated with the status and the status will change from “Submitted” to either “Approved” or “Rejected”. The action performed by the HR Admin will then be listed under “Actions Performed on the Timesheet” as shown in Figure 14.8.

Actions Performed on the Timesheet			
Action	Performed By	Date	Comment
Submitted	Kevin Ryan	2013-04-02	
Approved	Admin	2013-04-02	

Figure 14.8: Actions Performed on the Timesheet by HR Admin

8.2 Attendance

All attendance records are maintained and recorded under “Attendance” menu. Depending on the user, the attendance functions vary.

The Admin can:

- Generate project, attendance and employee reports for all the employees
- Configure user rights with regards to attendance

The ESS – Supervisor can:

- Punch In/Out
- View personal reports
- Generate project, attendance and employee reports for subordinates

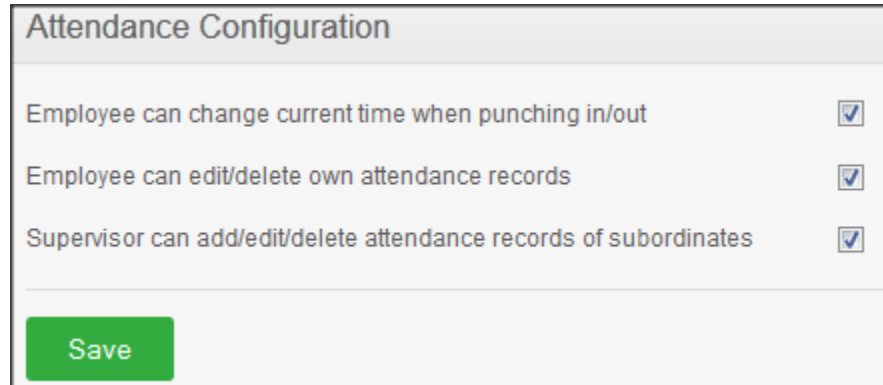
The ESS User can:

- Punch In/Out
- View personal time reports.

Configuration

The admin can select what privileges the employees and supervisors will have on the punch in/out and attendance. For configuration, go to **Time>> Attendance>> Configuration** and the screen as shown in Figure 14.9 will appear.

Click “Save” once done.



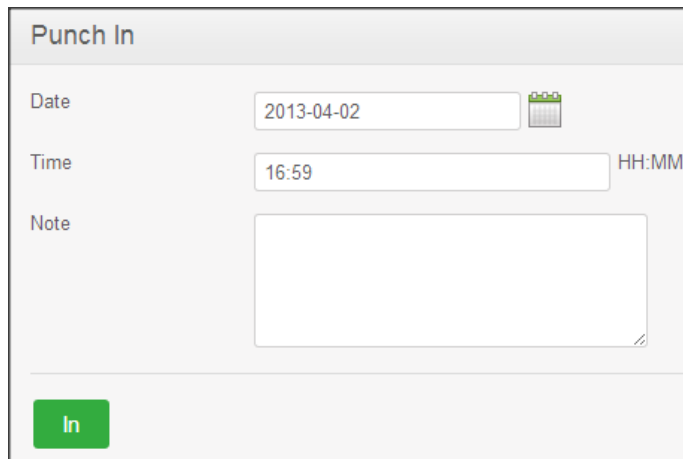
Attendance Configuration	
Employee can change current time when punching in/out	<input checked="" type="checkbox"/>
Employee can edit/delete own attendance records	<input checked="" type="checkbox"/>
Supervisor can add/edit/delete attendance records of subordinates	<input checked="" type="checkbox"/>

Save

Figure 14.9: Attendance Configuration

Punch In/Punch Out

This feature allows capturing the number of hours an employee spends working for the company. This feature is only available to the ESS – Supervisor and ESS User. To access the Punch In/Out tab, go to **Time>> Attendance>>Punch In/Out** and the screen as shown in Figure 15.0 will appear.

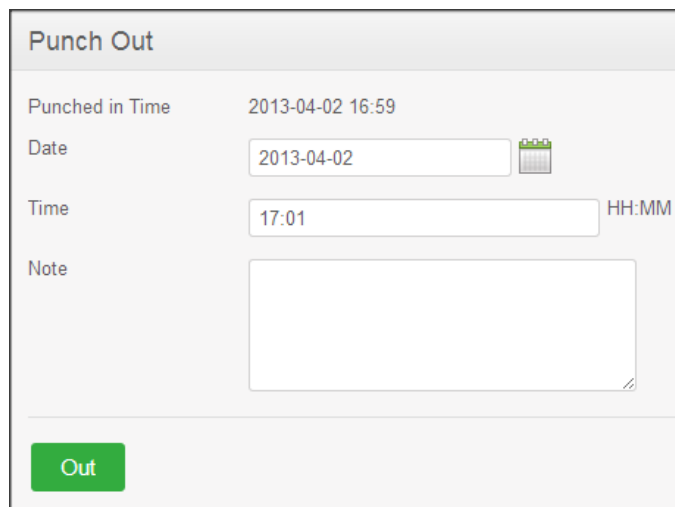


The screenshot shows a web form titled "Punch In". It contains three input fields: "Date" with the value "2013-04-02" and a calendar icon; "Time" with the value "16:59" and "HH:MM" label; and a "Note" field which is a large empty text area. At the bottom left of the form is a green button labeled "In".

Figure 15.0: Punch In

If the HR Admin has configured the attendance settings, the “Time” for both punch in/out could be changed otherwise the system will automatically capture the “system time”.

Once you click “In” the screen as shown in Figure 15.1 will appear. To punch out, click “Out”.



The screenshot shows a web form titled "Punch Out". It contains four input fields: "Punched in Time" with the value "2013-04-02 16:59"; "Date" with the value "2013-04-02" and a calendar icon; "Time" with the value "17:01" and "HH:MM" label; and a "Note" field which is a large empty text area. At the bottom left of the form is a green button labeled "Out".

Figure 15.1: Punch Out

My Records

This feature is available to both ESS-Employee and ESS-Supervisor. Once you have punched in and punched out, the details of your personal attendance record will be shown under “My Records”. To view details, go to **Time>> Attendance>> My Records** and the screen as shown in Figure 15.2 will appear.

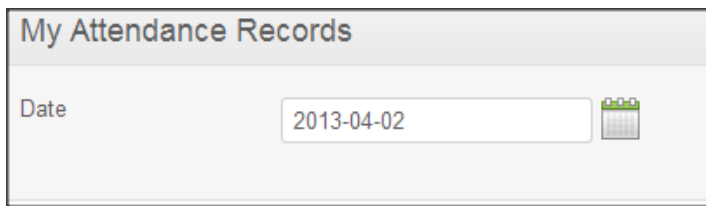


Figure 15.2: View My Records

Enter the date you want to view the attendance record and the screen as shown in Figure 15.3 will appear.

Edit		Delete			
Punch In	Punch In Note	Punch Out	Punch Out Note	Duration(Hours)	
<input type="checkbox"/> 2013-04-05 17:26:00 GMT 5.5		2013-04-05 21:29:00 GMT 5.5		4.05	
Total				4.05	

Figure 15.3: “My Records” in Details

If the HR Admin has configured the attendance settings the following options: “Edit” and “Delete” could be seen and selected. To edit the record, click “Edit” and to delete the record, click on the checkbox beside the record and click “Delete”.

Employee Records

This feature is available to both ESS-Supervisor (can view his/her subordinates attendance records) and HR Admin (can view all employees attendance records).

To view employee records, go to **Time>> Attendance>> Employee Records** and the screen as shown in Figure 15.4 will appear.

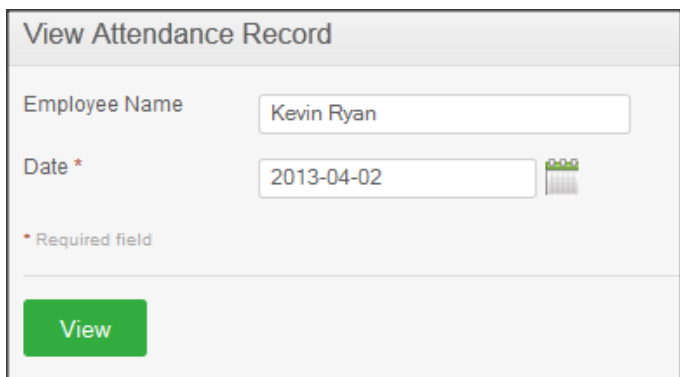


Figure 15.4: View Employee Records

You may enter the “Employee Name” and the “Date” you want to view the attendance record for and the screen as shown in Figure 15.5 will appear.

<input type="button" value="Edit"/> <input type="button" value="Add Attendance Records"/> <input type="button" value="Delete"/>							
<input type="checkbox"/>	Employee Name	Punch In	Punch In Note	Punch Out	Punch Out Note	Duration(Hours)	Total
<input type="checkbox"/>	Kevin Ryan	2013-04-02 16:59:00 GMT 5.5		2013-04-02 17:02:00 GMT 5.5		0.05	0.05

Figure 15.5: Employee Record in Detail

If the HR Admin has configured the attendance settings the following options: “Edit”, “Delete” and “Add Attendance Record” could be seen and selected. To edit the record, click “Edit”; enter the appropriate data and click “Save”.

To delete the record, click on the checkbox beside the record and click “Delete”.

To add another attendance record, click “Add Attendance Records” and enter the appropriate details.

***Note:** To add another attendance record, click on the “Add Attendance Records” twice; once to punch in and once again to punch out.

8.3 Reports

This feature is only available to both an ESS – Supervisor and the HR Admin. They can view the following in details:

- Project Report
- Employee Report
- Attendance Summary

Project Report

This feature is available to the Admin and ESS – Supervisors. The Admin can view can reports for all projects and the ESS – Supervisors can view reports of projects administered by them or projects assigned to them. To view project reports go to **Time>> Reports>> Project Reports** and the screen as shown in Figure 15.6 will appear.

Project Report

Project Name * Citibank - Project A ▼

Project Date Range From 2013-04-02 To 2013-04-12

Only Include Approved Timesheets

* Required field

View

Figure 15.6: View Project Report

Select the “Project Name” from the drop down menu and the “Project Date Range” by selecting the dates. The default project name is “All”. You may also click on the “Only Include Approved Timesheets” if you want to view only projects reports with approved timesheets. Click “View” once completed and the screen as shown in Figure 15.7 will appear.

Project Report

Project Name	UBS - Project B
Activity Name	Time (Hours)
Recruitment	7.00
Vendor Management	0.00
Total	7.00

Figure 15.7: Project Report

Employee Reports

These reports are available to both HR Admin and ESS-Supervisor. The Admin can view reports of all projects that all employees have been assigned to and the ESS – Supervisors can view reports of projects that his subordinates were assigned to. Here the Admin and ESS -Supervisor can track the time employees spent on particular activities.

To view an employee report, go to **Time>> Reports>>Employee Reports** and the screen as shown in Figure 15.8 will appear

Employee Report

Employee *

Project Name * ▼

Activity Name * ▼

Project Date Range From To

Only Include Approved Timesheets

* Required field

[View](#)

Figure 15.8: View Employee Report

Select the “Employee Name” from the drop down list, the “Project Name” he/she was assigned to and the “Activity Name” he/she took part in and define the “Project Date Range” by selecting from the dates. The default project name and project activity is “All”. You may also click on the “Only Include Approved Timesheets” if you want to view only employee reports with approved timesheets.

Click “View” once completed and the screen as shown in Figure 15.9.

Employee Report		
Employee Name	James Olsen	
Project Name	Activity Name	Time (Hours)
Citibank - Project A	Vendor Management	17.00
UBS - Project B	Recruitment	18.00
Total		35.00

Figure 15.9: Employee Report

Attendance Summary

These reports are available to both HR Admin and ESS-Supervisor. The Admin can view the attendance summary of all employees while an ESS – Supervisors can view the attendance summary of his/her

subordinates. Here the Admin and ESS -Supervisor can track the time employees have spent working in the company.

To view an employee’s attendance summary, go to **Time>> Reports>>Attendance Summary** and the screen as shown in Figure 16.0 will appear.

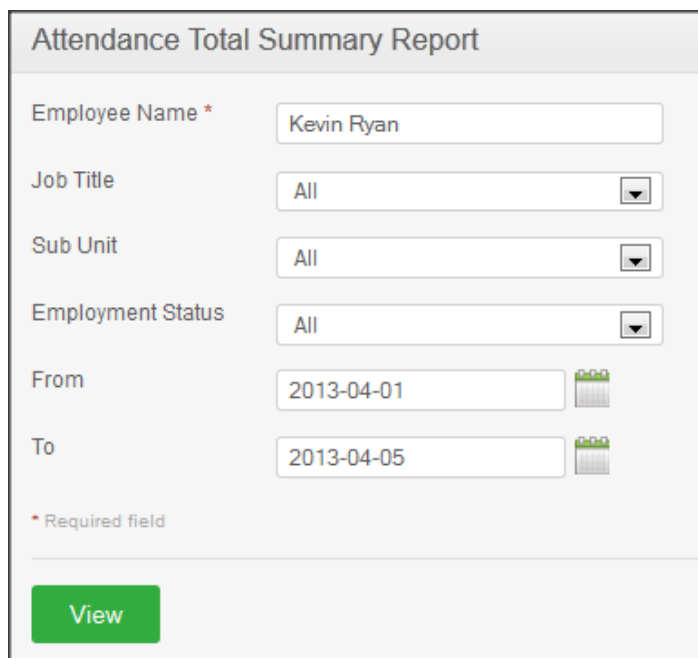
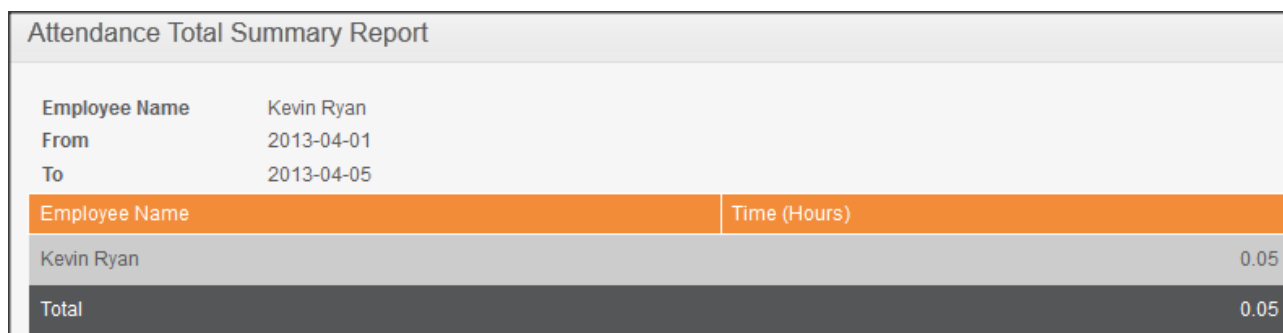


Figure 16.0: View Attendance Summary Report

Select the “Employee Name” from the drop down list, his/her “Job Title” and “Sub- Unit” he/she falls under and his/her “Employment Status”. The default job title/sub-unit/employment status is “All”. You may also select the date range you want to view the report for. Click “View” and the screen as shown in Figure 16.1 will appear.



Attendance Total Summary Report	
Employee Name	Kevin Ryan
From	2013-04-01
To	2013-04-05
Employee Name	Time (Hours)
Kevin Ryan	0.05
Total	0.05

Figure 16.1: Attendance Summary Report

9.0 Recruitment Module

The Recruitment Module manages the recruitment process of a company. The Admin can create Vacancies which will be listed on the link via **jobs.php**. A link has to be made on the website to take the applicant to **jobs.php**. Successful applicants are added to the system.

9.1 Candidates

Here the Admin can view the overall status of employee's applications and search for candidates using the criteria provided. To perform a candidate search go to Recruitment Module>> Candidates and the screen as shown in Figure 16.2 will appear.

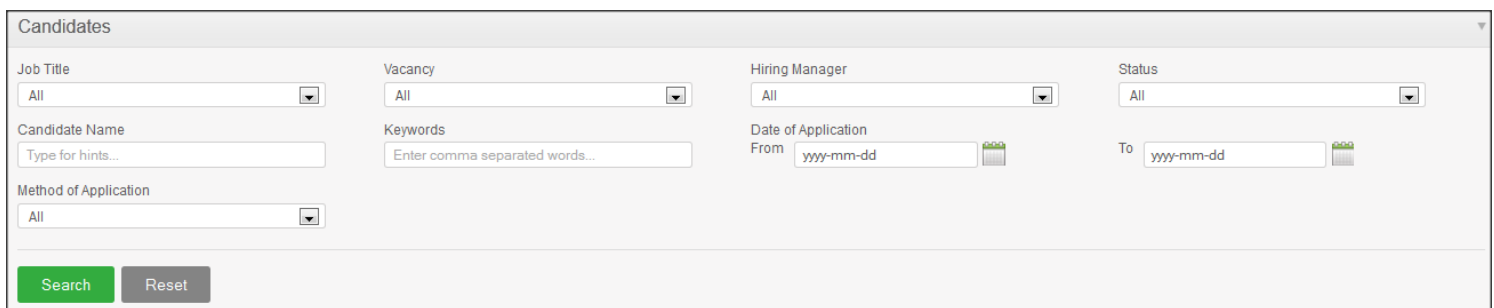


Figure 16.2: Candidates

- Job Title: search for the candidates who have applied for a specific job title that may not be necessarily posted.
- Vacancy: search for the candidates who have applied for a vacancy posted on the website.
- Hiring Manager: search for candidates with interviews with a particular hiring managers.
- Candidate Name: search for a particular candidate
- Keywords: search for candidates using specific keywords that the candidates may have entered on the application form for easy short-listing for a particular vacancy.
- Status: search for candidate with the following status of the application:
 - Application Initiated
 - Shortlisted
 - Interview Scheduled
 - Interview Passed
 - Interview Failed

- Job Offered
- Offer Declined
- Rejected
- Hired

Method of Application: search for candidates who have applied for any vacancy via:

- Manual: through post/email
- Online: through the job portal

Date of Application: search for candidates who have applied for a specific period of time .Select the dates from “From” to “To”.

Click ‘Search’ to perform the candidate search.

Candidates List

Once a candidate applies for a particular vacancy that is posted online, they will be populated on the database under the Recruitment Module. To view candidates list, go to Recruitment >>Candidates and the screen as shown in Figure 16.3 will appear.

<input type="button" value="Add"/> <input type="button" value="Delete"/> <input type="button" value="Export To CSV"/> <input type="button" value="Archive"/>						
Click on a candidate to perform actions						
<input type="checkbox"/>	Vacancy	Candidate	Hiring Manager	Date of Application	Status	Resume
<input type="checkbox"/>	Jenny Mathews	Madhushanka Perera	Peter Anderson (Past Employee)	2013-04-02	Shortlisted	
<input type="checkbox"/>	Vacancy for Manager IT	Lucas Nolan	Anthony Nolan	2013-03-29	Interview Scheduled	
<input type="checkbox"/>	Vacancy for Controller	Ryan Parker	Russel Hamilton	2013-03-21	Hired	Download
<input type="checkbox"/>	Vacancy for Finance Manager	Harsha Silva	Russel Hamilton	2013-03-21	Hired	Download
<input type="checkbox"/>	Vacancy for Finance Manager	daniel Piger	Russel Hamilton	2013-03-20	Interview Scheduled	
<input type="checkbox"/>	Vacancy for Controller	Anne Clinton	Russel Hamilton	2013-03-14	Interview Scheduled	Download
<input type="checkbox"/>	Vacancy for Controller	Jenny Mathews	Russel Hamilton	2012-12-18	Interview Failed	Download

Figure 16.3: Candidates List

To view candidate’s application status details and perform an action click on the “Candidate” name and the screen as shown in Figure 16.4 will appear. Click “Edit” to select perform an action.

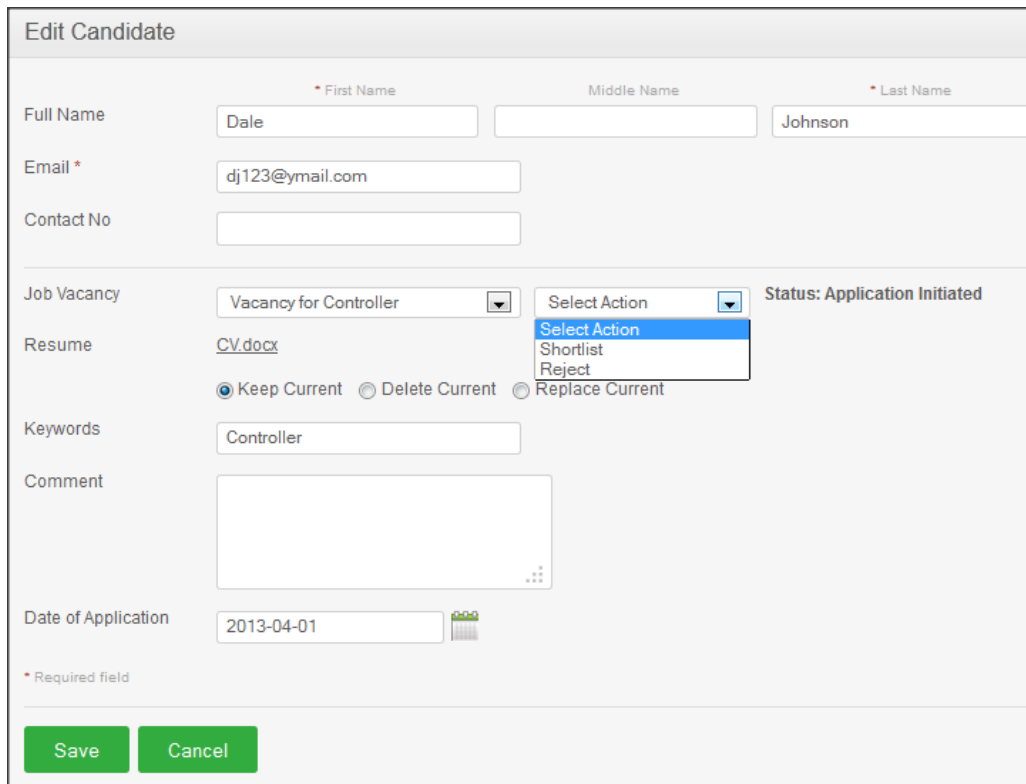


Figure 16.4: Candidate's Application Status Details

The following information will be populated on the screen:

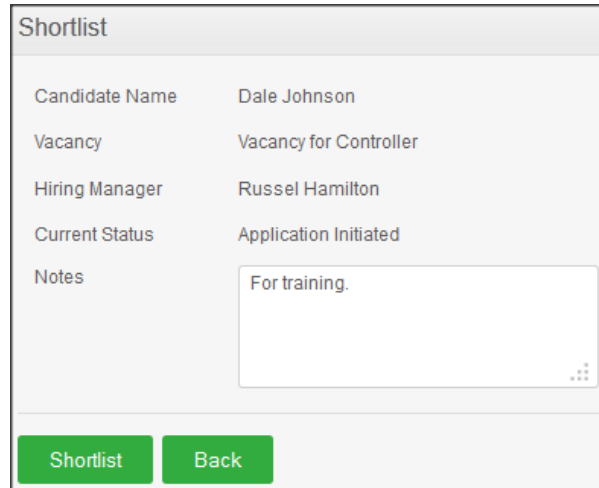
- Full Name
- Email
- Contact No.
- Job Vacancy
- Status : You may select if you want to shortlist or reject the particular candidate
- Resume
 - Keep Current: You may retain the current resume
 - Delete Current: delete the current resume
 - Replace Current: replace current resume with another resume for which you will be prompted to upload another resume document.
- Keywords: used to search for candidates with specific qualifications needed for a particular vacancy
- Comment
- Date of Application: date of which the application was created.

The default application status is "Application Initiated" and the HR Admin can perform the following action for the particular candidate:

- Shortlist
- Reject

Shortlist

The Admin or the Hiring Manager can choose to shortlist a particular candidate; Select “Shortlist” from the “Action” drop down menu and the screen as shown in Figure 16.5 will appear.

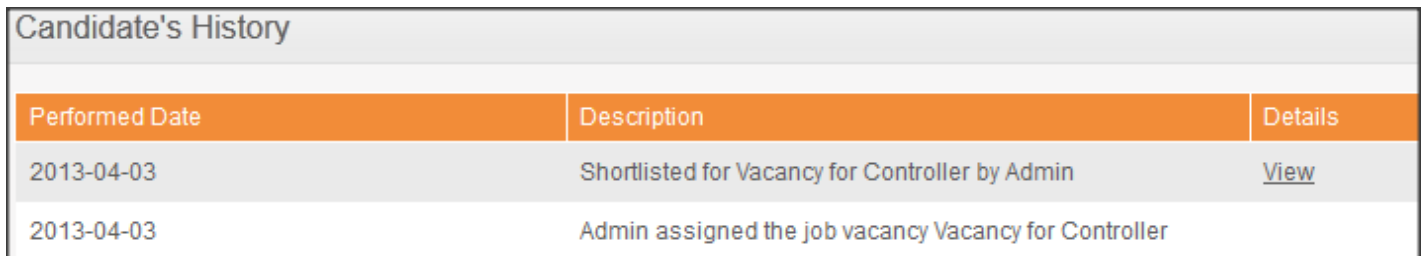


Shortlist	
Candidate Name	Dale Johnson
Vacancy	Vacancy for Controller
Hiring Manager	Russel Hamilton
Current Status	Application Initiated
Notes	<input type="text" value="For training."/>
<input type="button" value="Shortlist"/> <input type="button" value="Back"/>	

Figure 16.5: Shortlist

Click “Shortlist” to shortlist the candidate. Click “Back” to shown the candidate’s application history.

The following action will be reflected under “Candidate’s History” as shown in Figure 16.6.



Candidate's History		
Performed Date	Description	Details
2013-04-03	Shortlisted for Vacancy for Controller by Admin	View
2013-04-03	Admin assigned the job vacancy Vacancy for Controller	

Figure 16.6: Candidate's History

Reject

Alternatively, the Admin or Hiring Manager can turn down an application. To do so, select “Reject” from the “Action” drop down menu and click “Save” and the screen as shown in Figure 16.7 will appear.

Reject


Candidate Name	Dale Johnson
Vacancy	Vacancy for Controller
Hiring Manager	Russel Hamilton
Current Status	Shortlisted
Notes	<input type="text"/>

Figure 16.7: Reject

Schedule Interview

Once a candidate is shortlisted, they can now be scheduled for an interview, to schedule an interview, select “Schedule Interview” from the “Action” drop down menu and the screen as shown in Figure 16.8 will appear.

Schedule Interview

Candidate Name	Dale Johnson
Vacancy Name	Vacancy for Controller
Current Status	Interview Scheduled
Interview Title *	<input type="text" value="Controller - First Interview"/>
Interviewer Name *	<input type="text" value="Jennifer Brown"/> Add Another
Date *	<input type="text" value="2013-04-05"/> 
Time	<input type="text" value="14:00"/> HH:MM
Notes	<input type="text" value="Please attend the interview on time and in formal attire. Thank you."/>

* Required field

Figure 16.8: Schedule Interview

Enter the following fields and click “Save”. Click “Back” and the following action will then be reflected under “Candidate’s History” as shown in Figure 16.9.

Candidate's History		
Performed Date	Description	Details
2013-04-03	Admin scheduled Controller - First Interview on 2013-04-05 at 14:00 with Jennifer Brown for Vacancy for Controller	View
2013-04-03	Shortlisted for Vacancy for Controller by Admin	View
2013-04-03	Admin assigned the job vacancy Vacancy for Controller	

Figure 16.9: Candidate's History

Mark Interview Passed

Once a candidate has completed his interview, the HR Admin or the Hiring Manager may pass or fail the candidate based on the interview. To mark interview as passed, select “Mark Interview Passed” from the “Action” drop down menu and the screen as shown in Figure 17.0 will appear.

Mark Interview Passed

Candidate Name	Dale Johnson
Vacancy	Vacancy for Controller
Hiring Manager	Russel Hamilton
Current Status	Interview Scheduled
Notes	<input style="width: 90%; height: 40px;" type="text" value="1st interview passed."/>

Mark Interview Passed
Back

Figure 17.0: Mark Interview Passed

You may write a note and click “Mark Interview Passed” to confirm action. Click “Back” and the following action will be reflected under “Candidate’s History” as shown in Figure 17.1.

Candidate's History		
Performed Date	Description	Details
2013-04-03	Admin marked Controller - First Interview as passed for Vacancy for Controller	View
2013-04-03	Admin scheduled Controller - First Interview on 2013-04-05 at 14:00 with Jennifer Brown for Vacancy for Controller	View
2013-04-03	Shortlisted for Vacancy for Controller by Admin	View
2013-04-03	Admin assigned the job vacancy Vacancy for Controller	

Figure 17.1: Candidate's History

Mark Interview Failed

The HR Admin or the Hiring Manager can also mark the interview failed. To do so, select “Mark Interview Failed” from the “Action” drop down menu and the screen as shown in Figure 17.2 will appear

Mark Interview Failed

Candidate Name: Lucas Nolan

Vacancy: Vacancy for Manager IT

Hiring Manager: Anthony Nolan

Current Status: Interview Scheduled

Notes:

⋮

Mark Interview Failed
Back

Figure 17.2: Mark Interview Failed

You may write a note and click “Mark Interview Failed” to confirm the action. Click “Back” and the action will be reflected under “Candidate’s History” as shown in Figure 17.3.

Candidate's History		
Performed Date	Description	Details
2013-04-03	Admin marked SE - 1st Interview as failed for Vacancy for Manager IT	View
2013-03-29	Admin scheduled SE - 1st Interview on 2013-04-04 at 10:50 with Nick Silverstone for Vacancy for Manager IT	View
2013-03-29	Shortlisted for Vacancy for Manager IT by Admin	View
2013-03-29	Admin assigned the job vacancy Vacancy for Manager IT	

Figure 17.3: Candidate's History

Offer Job

The HR Admin or the Hiring Manager may offer the candidate the job. To do so, click “Edit” and select “Offer Job” from the “Action” drop down menu and the screen as shown in Figure 17.4 will appear.

Offer Job

Candidate Name	Dale Johnson
Vacancy	Vacancy for Controller
Hiring Manager	Russel Hamilton
Current Status	Interview Passed
Notes	<input style="width: 90%; height: 40px;" type="text" value="Fast track to team lead"/>

Offer Job
Back

Figure 17.4: Offer Job

You may enter a note and click “Offer Job” to confirm the action. Click “Back” and the action will be reflected under Candidate’s History as shown in Figure 17.5.

Candidate's History		
Performed Date	Description	Details
2013-04-03	Admin offered the job for Vacancy for Controller	View
2013-04-03	Admin marked Controller - First Interview as passed for Vacancy for Controller	View
2013-04-03	Admin scheduled Controller - First Interview on 2013-04-05 at 14:00 with Jennifer Brown for Vacancy for Controller	View
2013-04-03	Shortlisted for Vacancy for Controller by Admin	View
2013-04-03	Admin assigned the job vacancy Vacancy for Controller	

Figure 17.5: Candidate's History

Decline Offer

If incase the offer was declined by the applicant then it can be listed as a “Decline Offer”. To mark the application as decline offer, click “Edit” and select “Decline Offer” from the “Action” drop down menu and the screen as shown in Figure 17.6 will appear.

Decline Offer

Candidate Name	Dale Johnson
Vacancy	Vacancy for Controller
Hiring Manager	Russel Hamilton
Current Status	Job Offered
Notes	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;">Salary disagreement </div>

Decline Offer
Back

Figure 17.6: Decline Offer

You may enter a note and click “Decline Offer” to confirm the action. Click “Back” and the following action will be reflected under the Candidate’s History as shown in Figure 17.7.

Candidate's History		
Performed Date	Description	Details
2013-04-03	Admin marked the offer as declined for Vacancy for Controller	View
2013-04-03	Admin offered the job for Vacancy for Controller	View
2013-04-03	Admin marked Controller - First Interview as passed for Vacancy for Controller	View
2013-04-03	Admin scheduled Controller - First Interview on 2013-04-05 at 14:00 with Jennifer Brown for Vacancy for Controller	View
2013-04-03	Shortlisted for Vacancy for Controller by Admin	View
2013-04-03	Admin assigned the job vacancy Vacancy for Controller	

Figure 17.7: Candidate's History

Hire

The HR Admin or the Hiring Manager may choose to hire the candidate at this point. To hire the candidate, click “Edit” and select “Hire” from the “Action” drop down menu and the screen as shown in Figure 17.8 will appear.

Hire

Candidate Name	Anne Clinton
Vacancy	Vacancy for Controller
Hiring Manager	Russel Hamilton
Current Status	Job Offered
Notes	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> Fast track to team lead, management potential. </div>

Hire
Back

Figure 17.8: Hire

You may add a note and click “Hire” to confirm the action. Click “Back” and the action will be reflected under “Candidate’s History as shown in Figure 17.9.

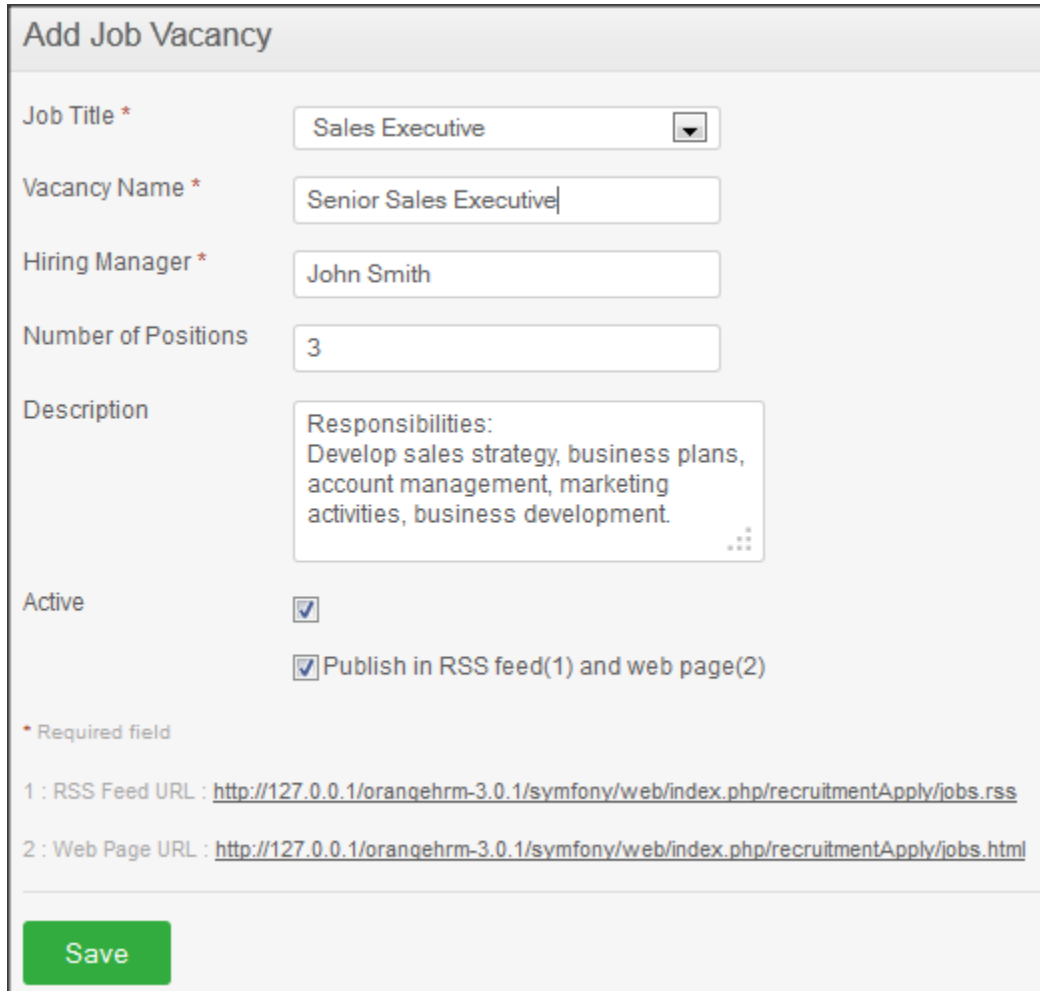
Candidate's History		
Performed Date	Description	Details
2013-04-03	Admin hired Anne Clinton for Vacancy for Controller	View
2013-04-03	Admin offered the job for Vacancy for Controller	View
2013-04-03	Admin marked 1st interview - QA as passed for Vacancy for Controller	View
2013-03-29	Admin scheduled 1st interview - QA on 2013-04-02 at 10:10 with Jennifer Brown for Vacancy for Controller	View
2013-03-29	Shortlisted for Vacancy for Controller by Admin	View
2013-03-29	Admin assigned the job vacancy Vacancy for Controller	

Figure 17.9: Candidate's History

Once the candidate is hired, he/she will be added to the employee database under the PIM Module.

9.2 Vacancies

Here the Admin can create a vacancy for a particular job title required by the company. To add a vacancy, go to Recruitment>>Vacancies and click “Add” and the screen as shown in Figure 18.0 will appear.



Add Job Vacancy

Job Title *

Vacancy Name *

Hiring Manager *

Number of Positions

Description

Active

Publish in RSS feed(1) and web page(2)

* Required field

1 : RSS Feed URL : <http://127.0.0.1/orangehrm-3.0.1/symfony/web/index.php/recruitmentApply/jobs.rss>

2 : Web Page URL : <http://127.0.0.1/orangehrm-3.0.1/symfony/web/index.php/recruitmentApply/jobs.html>

Figure 18.0: Add Job Vacancy

Enter the following fields:

- Job title: the position that is needed by the company
- Vacancy Name: the name in which you want the vacancy to be posted as.
- Hiring Manager
- Number of Positions
- Description: a description of the job role
- Active: to make the job vacancy active and be posted online. You may unselect “Active” if you want to post the vacancy some other time.

- Publish in RSS Feed and Webpage: you may publish the vacancy of RSS feed and on the company’s webpage. The following links will appear to show the pathway of the job that was posted as shown in Figure 18.1.

• Required field

1 : RSS Feed URL : <http://127.0.0.1/orangehrm-3.0.1/symfony/web/index.php/recruitmentApply/jobs.rss>

2 : Web Page URL : <http://127.0.0.1/orangehrm-3.0.1/symfony/web/index.php/recruitmentApply/jobs.html>

Figure 18.1: RSS Feed

Click “Save “once you have defined the job vacancy and it will be listed as shown in Figure 18.2.

Add		Delete		
<input type="checkbox"/>	Vacancy	Job Title	Hiring Manager	Status
<input type="checkbox"/>	Post of Accountant	Accountant	Jennifer Brown	Active
<input type="checkbox"/>	Vacancy for Controller	Controller	Russel Hamilton	Active
<input type="checkbox"/>	Vacancy for Manager IT	IT Manager	Anthony Nolan	Active

Figure 18.2: Job Vacancy List

Applying for a Vacancy

Both internal and external applicants can apply for a vacancy through jobs.php. When an applicant visits the company’s website or through the RSS feed they will be directed to the job vacancy portal in jobs.php where they will see all the active vacancies of the company as shown in Figure 18.3.

Active Job Vacancies

[Expand all](#) | [Collapse all](#)

Senior Sales Executive [+]

Responsibilities:
Develop sales strategy, business plans, account management, marketing activities, business development.

[Apply](#)

Figure 18.3: Active Job Vacancies

The applicant may click “Apply” under the particular Job title and they will be directed to the screen as shown in Figure 18.4.

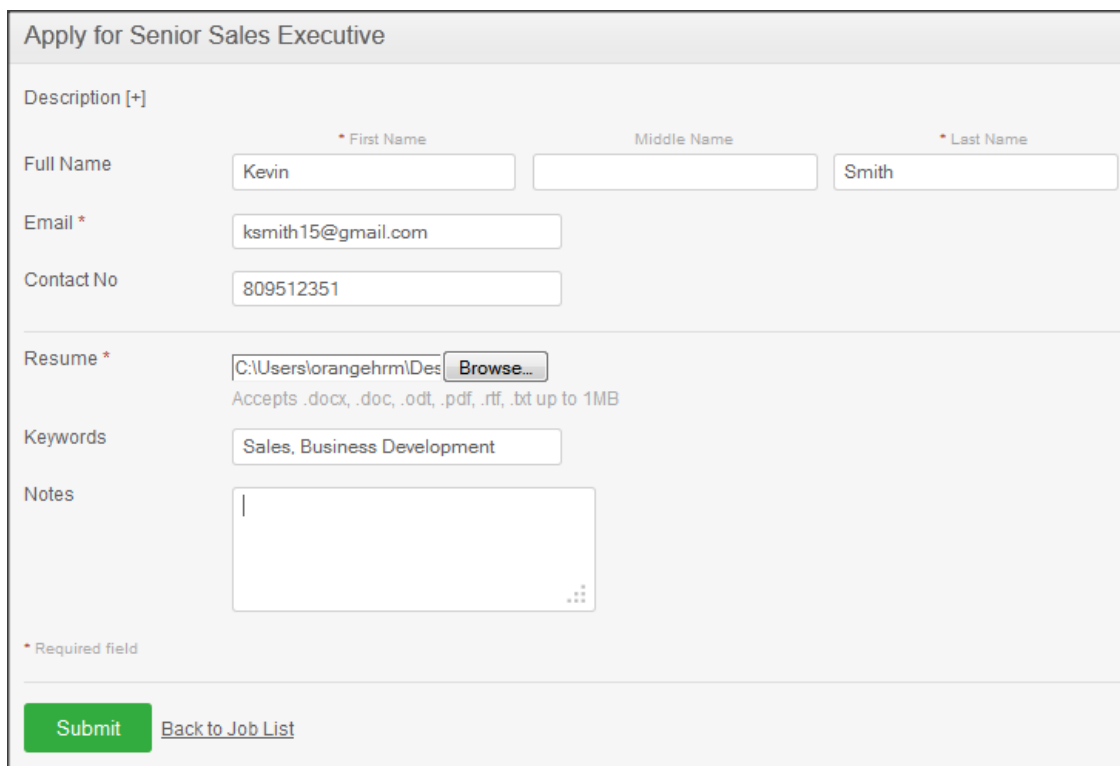
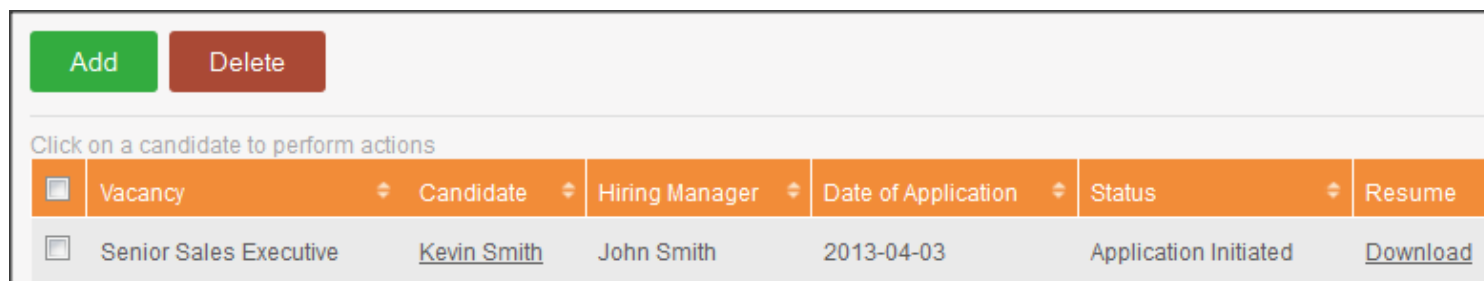


Figure 18.4: Apply for Job Vacancy

The applicant needs to enter the following fields and click “Submit” to submit the application and the candidate will appear under the candidate database (Recruitment Module>>Candidates) as shown in Figure 18.5.



Add		Delete				
Click on a candidate to perform actions						
<input type="checkbox"/>	Vacancy	Candidate	Hiring Manager	Date of Application	Status	Resume
<input type="checkbox"/>	Senior Sales Executive	Kevin Smith	John Smith	2013-04-03	Application Initiated	Download

Figure 18.5: Candidate List

10.0 Performance Module

This module manages and reviews the performance of all employees where a company can understand how well an employee is performing in relation to their strategic goals and objectives.

10.1 KPI List

This feature enlists all Key Performance Indicator (KPI) for all job titles. To view KPI List, go to Performance >> KPI List and the screen as shown in Figure 18.6 will appear.

Search Key Performance Indicators

Job Title

<input type="checkbox"/>	Key Performance Indicator	Job Title	Min Rate	Max Rate	Is Default
<input type="checkbox"/>	Attendance	Program Manager	1	10	-
<input type="checkbox"/>	Process optimization	Accountant	1	10	Yes
<input type="checkbox"/>	Punctuality	Program Manager	1	10	-
<input type="checkbox"/>	Quota goals	Pre-Sales Executive	1	10	-

Figure 18.6: Key Performance Indicators

10.2 Add KPI

The HR Admin can define a KPI for a specific job title. To do so, go to Performance>> Add KPI and the screen as shown in Figure 18.7 will appear.

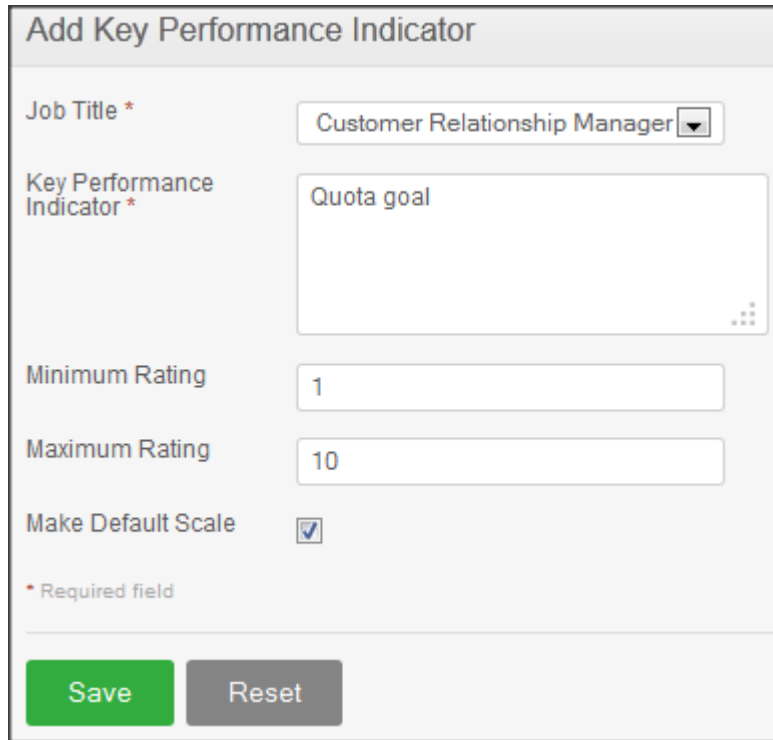


Figure 18.7: Add Key Performance Indicator

Enter the “Job Title” you wish to define a KPI for, define the “KPI”, and define the “Minimum” and “Maximum” rating for the KPI. If you select “Make Default Scale” the defined minimum and maximum rating will be pre-populated for all KPIs added in the future.

Click “Save” once all the fields are entered. The following Key Performance Indicator will then be listed under KPI List (see Figure 18.6).

10.3 Copy KPI

You may copy a KPI from one job title to another through this feature. To do so, go to Performance>> Copy KPI and the screen as shown in Figure 18.8 will appear.

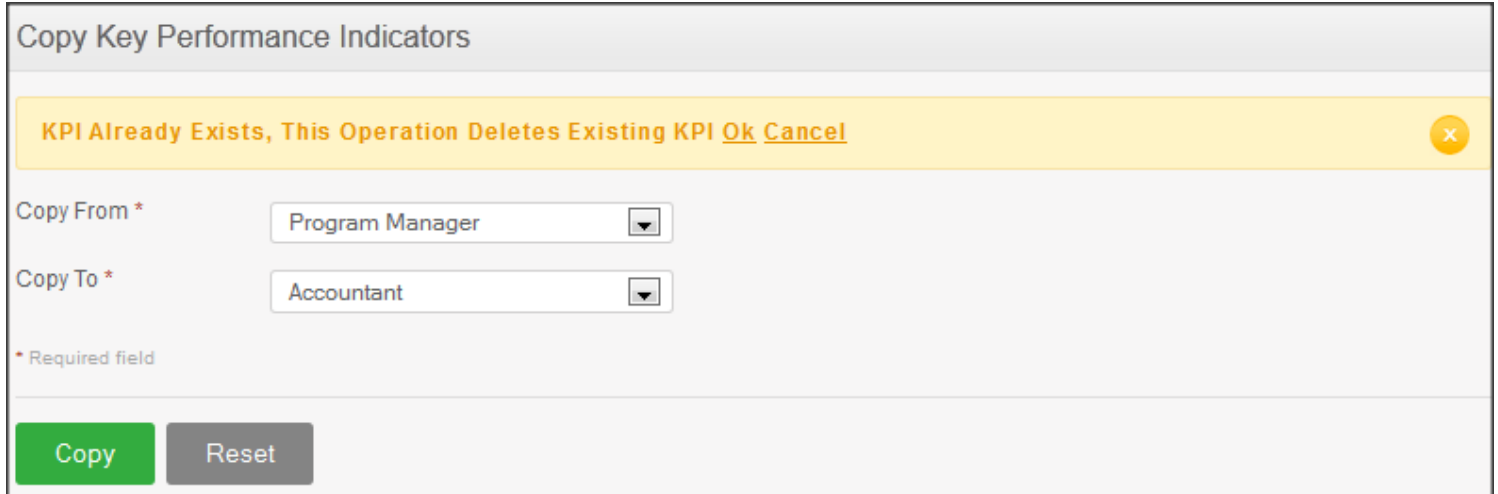


Figure 18.8: Copy Key Performance Indicators

Click “Save” once you have selected the fields.

***Note:** Once you copy a KPI from one job title to another job title with an **existing** KPI, the operation will delete the respective existing KPI and replace it with the copied one. Click “OK” to replace the existing KPI.

If you want to copy a KPI from one job title to another job title **without** an existing KPI, the operation will simply just copy the KPI from one job title to another as shown in Figure 18.9.

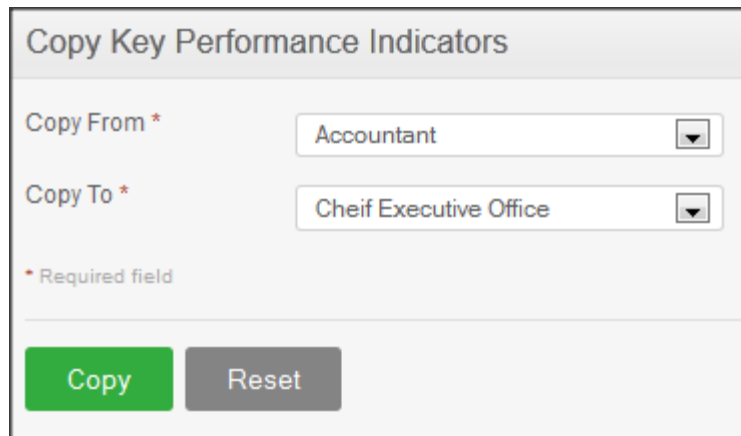


Figure 18.9: Copy Key Performance Indicators

Click “Save” once you have selected the fields and the KPI copied will be listed as shown in Figure 19.0.

<input type="checkbox"/>	Key Performance Indicator	Job Title	Min Rate	Max Rate	Is Default
<input type="checkbox"/>	Attendance	Program Manager	1	10	-
<input type="checkbox"/>	Process optimization	Accountant	1	10	Yes
<input type="checkbox"/>	Process optimization	Cheif Executive Office	1	10	-
<input type="checkbox"/>	Punctuality	Program Manager	1	10	-
<input type="checkbox"/>	Quota goals	Pre-Sales Executive	1	10	-

Figure 19.0: Key Performance Indicators for Job Title

You may enter multiple entries of KPIs for different Job titles. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.


10.4 Add Review


This feature allows a performance review agenda for a particular employee. To enter performance review details for a particular employee, go to Performance>>Add Review and the screen as shown in Figure 19.1 will appear.


Add Performance Review

Employee Name *

Reviewer Name *

From * 

To * 

Due Date * 

* Required field

Figure 19.1: Add Performance Review

Enter the following details and click “Save”. Click on “View” on top of the screen to view the performance review details and the list of employees with the following performance review details will be listed as shown in Figure 19.2.

<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>						
<input type="checkbox"/>	Employee	Job Title	Review Period	Due Date	Status	Reviewer
<input type="checkbox"/>	Harshani Silva	Pre-Sales Executive	2013-04-03 - 2013-04-05	2013-04-11	Scheduled	Ryan Parker

Figure 19.2: Performance Review List

You may enter multiple entries of performance review for employees. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

10.5 Reviews

This feature allows you to review an employee’s performance based on the KPIs for his /her job role. To review an employee’s performance, go to Performance>>Reviews and the screen as shown in Figure 19.3 will appear.

Search Performance Reviews

From To Job Title Sub Division

Employee Reviewer

<input type="checkbox"/>	Employee	Job Title	Review Period	Due Date	Status	Reviewer
<input type="checkbox"/>	Harshani Silva	Pre-Sales Executive	2013-04-03 - 2013-04-05	2013-04-11	Scheduled	Ryan Parker

Figure 19.3: Search Performance Reviews

You may search for a particular performance review of an employee by using the search criteria:

- From – To: The date period for the particular performance review

- Job Title: employees with the specified job title to be reviewed
- Subdivision: the subdivision of the employee's to be reviews
- Employee: the employee's name
- Reviewer: the reviewer's name

Simply click on the employee name to initiate the performance review and the screen as shown in Figure 19.4 will appear.

Performance Review

Employee	Harshani Silva
Job Title	Pre-Sales Executive
Reviewer	Ryan Parker
Review Period	2013-04-03-2013-04-05
Status	Scheduled

Key Performance Indicator	Min Rate	Max Rate	Rating	Reviewer Comments
Quota goals	1	10	<input style="width: 50px;" type="text"/>	<input style="width: 100%; height: 40px;" type="text"/>
Note				<input style="width: 100%; height: 40px;" type="text"/>

Edit
Back

Figure 19.4: Performance Review of an employee

Click "Edit" to enter details:

- Rating: rate the employee based on the KPI with the assigned Min and Max Rate
- Reviewers Comments: you may enter a comment based on the KPI
- Note: you may enter an overall note regarding the employee's performance review.

11.0 Troubleshooting

During the Installation Process:

1. Are you receiving the following error message while installing OrangeHRM?

Access denied for user 'root'@'localhost' (using password: NO). Please Check if Privileged Database Username and Password Correct.

This is due to an invalid MySQL username or password.

Once you provide a valid MySQL username and password, the installation process can be continued.

2. Give a unique Database Name...

Database (end) already exists.

The set up will not allow you to have duplicate database names. If you have previously installed the OrangeHRM application with the same database name, you need to provide a different Database Name for the OrangeHRM system that is being installed. Therefore, make sure that the Database Name given for each OrangeHRM system installed is unique.

3. Linux Users

If you are a Linux user, provide file permission.

Ex: `sudo chmod -R 777 projectname`

Please visit <https://help.ubuntu.com/community/FilePermissions> for more information on how to provide file permission.

In order for your OrangeHRM installation to function properly, please ensure that all of the system check items listed below are green. If any are red, please take the necessary steps to fix them.

Component	Status [For More Information ?]
PHP version	OK (ver 5.3.2-1ubuntu4.15)
MySQL Client	OK (ver 5.1.62)
MySQL Server	OK (ver 5.1.62-0ubuntu0.10.04.1)
MySQL InnoDB Support	Enabled
Write Permissions for "lib/confs"	Not Writeable*
Write Permissions for "lib/logs"	Not Writeable*
Write Permissions for "symfony/apps/orangehrm/config"	Not Writeable*
Write Permissions for "symfony/cache"	Not Writeable*
Write Permissions for "symfony/log"	Not Writeable*
Maximum Session Idle Time before Timeout	OK
Register Globals turned-off	OK
Memory allocated for PHP script	OK
Web server allows .htaccess files	Not enabled! This makes OrangeHRM vulnerable to security attacks.

* Web server requires write privilege to the following directory /var/www/copp/live-2.5-merge-2.6.10/lib/confs

After Installation:

4. A Blank Page Displayed

This might be due to several reasons:

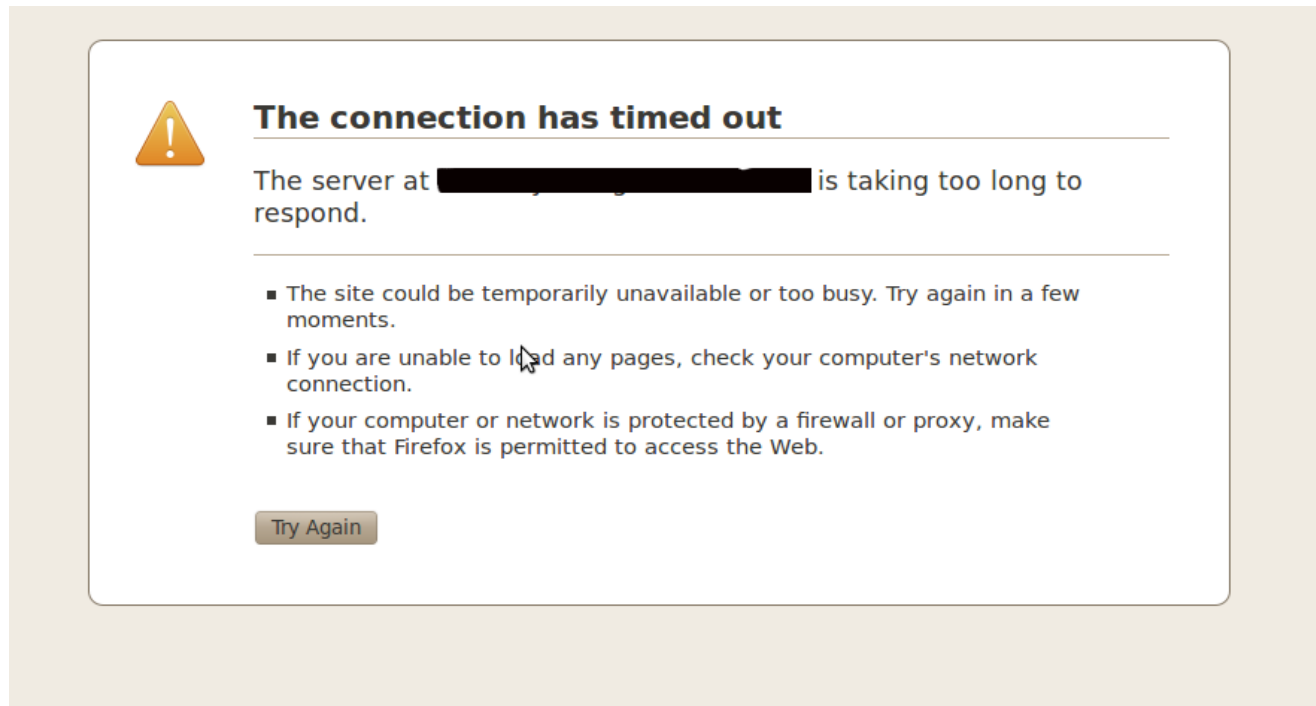
- You might be using an older version of Internet Explorer.
- JavaScript might be disabled in your browser.
- You might be using IIS or a different web server. We recommend Apache server, or you could install xampp/wamp package instead.
- You might have to increase the PHP and MySQL parameters. Please visit the following link to change parameter values:

[https://wiki.orangehrm.com/index.php/38%29 How to increase PHP and MYSQL performance parameters%3F](https://wiki.orangehrm.com/index.php/38%29%20How%20to%20increase%20PHP%20and%20MYSQL%20performance%20parameters%3F)

(Take backups of php.ini and my.ini(or my.cnf) files before making any changes.

While Using OrangeHRM:

5. Web Page Time Out



Increase the PHP and MySQL parameters.

Please visit the following link to learn how to change PHP and MySQL parameters:

[https://wiki.orangehrm.com/index.php/38%29 How to increase PHP and MYSQL performance parameters%3F](https://wiki.orangehrm.com/index.php/38%29%20How%20to%20increase%20PHP%20and%20MYSQL%20performance%20parameters%3F)

12.0 Frequently Asked Questions

1. How to enable InnoDB support in MySQL?

To enable "InnoDB" open "my.cnf" file in a text editor and search for "skip-innodb". Add the leading "#" and restart the MySQL database server to enable InnoDB.

2. I have created the MySQL database user properly with all rights and setup Conf.php correctly, when I login I get an error saying; "Client does not support authentication protocol requested by server; consider upgrading MySQL client".

You are probably using PHP4 with a MySQL client older than 4.1 which does not support the password hash algorithm used by post-MySQL 4.1 databases.

The work around for the problem would be to use the following commands on MySQL prompt:

```
SET PASSWORD FOR '<username>'@'%' = OLD_PASSWORD('<password>');
```

OR

```
SET PASSWORD FOR '<username>'@'localhost' = OLD_PASSWORD('<password>');
```

3. After I have logged into OrangeHRM I sent to a Re-login page which makes me login again.

This could be a result of sessions being disabled or session lifetime set too short, thereby the session is expired in between requests sent to the web-server. Increase the session lifetime. (You may have to contact a system administrator if you are only given limited access)

4. I have entered the username and password, but nothing happens.

JavaScript is either disabled or unsupported in your browser. You need to use a JavaScript enabled browser to use OrangeHRM.

Please visit <http://enable-javascript.com/> to enable JavaScript in your browser.

5. Why can't I access OrangeHRM after I install one click installer?

- Please check if you have installed other web server software like IIS , Sun Web Server etc.

- If you have other servers, check the ports used by each server. (They need to run in different ports). Please make sure you are accessing OrangeHRM through the correct port.
Ex: If the port apache server uses for http is 8080, your address should be [http://localhost:8080/OrangeHrm\(version\)](http://localhost:8080/OrangeHrm(version)).
- If not you might have given a hostname when installing the exe.
Ex: Say the name given was "testserver". Then you should try the url <http://testserver/orangehrm>.
- One other option would be to check whether the service is indeed running.
- Run services.msc in windows' run dialog box and check in the list whether the service apache is running.
- Check whether software like Skype is running, as it will occasionally prevent startup of web server.

6. How to increase PHP and MYSQL performance parameters?

Please refer :

[https://wiki.orangehrm.com/index.php/38%29 How to increase PHP and MYSQL performance parameters%3F](https://wiki.orangehrm.com/index.php/38%29%20How%20to%20increase%20PHP%20and%20MYSQL%20performance%20parameters%3F)

7. Unable to click on buttons in the OrangeHRM application

The error is encountered when JavaScript and other active scripting components are disabled in your Browser.

Please visit <http://enable-javascript.com/> to enable JavaScript in your browser.

For more information please visit: [https://wiki.orangehrm.com/index.php/Orange FAQ](https://wiki.orangehrm.com/index.php/Orange_FAQ)

Please contact us on sales@orangehrm.com for more information.