



ESS-Employee Self Service User Manual for OrangeHRM OS v 3.3



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1.0 Audience

This document is intended as a complete guide for ESS-Users using OrangeHRM 3.3. 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 The System

Log in to the OrangeHRM System using your ESS-User account that has been created by the HR Admin as shown in Figure 1.0.



Figure 1.0: Log in Panel

3.0 My Info Module

My Info Module is a powerful tool providing employees of the company with the ability to view relevant information such as personal information and updating personal information with an internet enabled PC without having to involve the HR department.

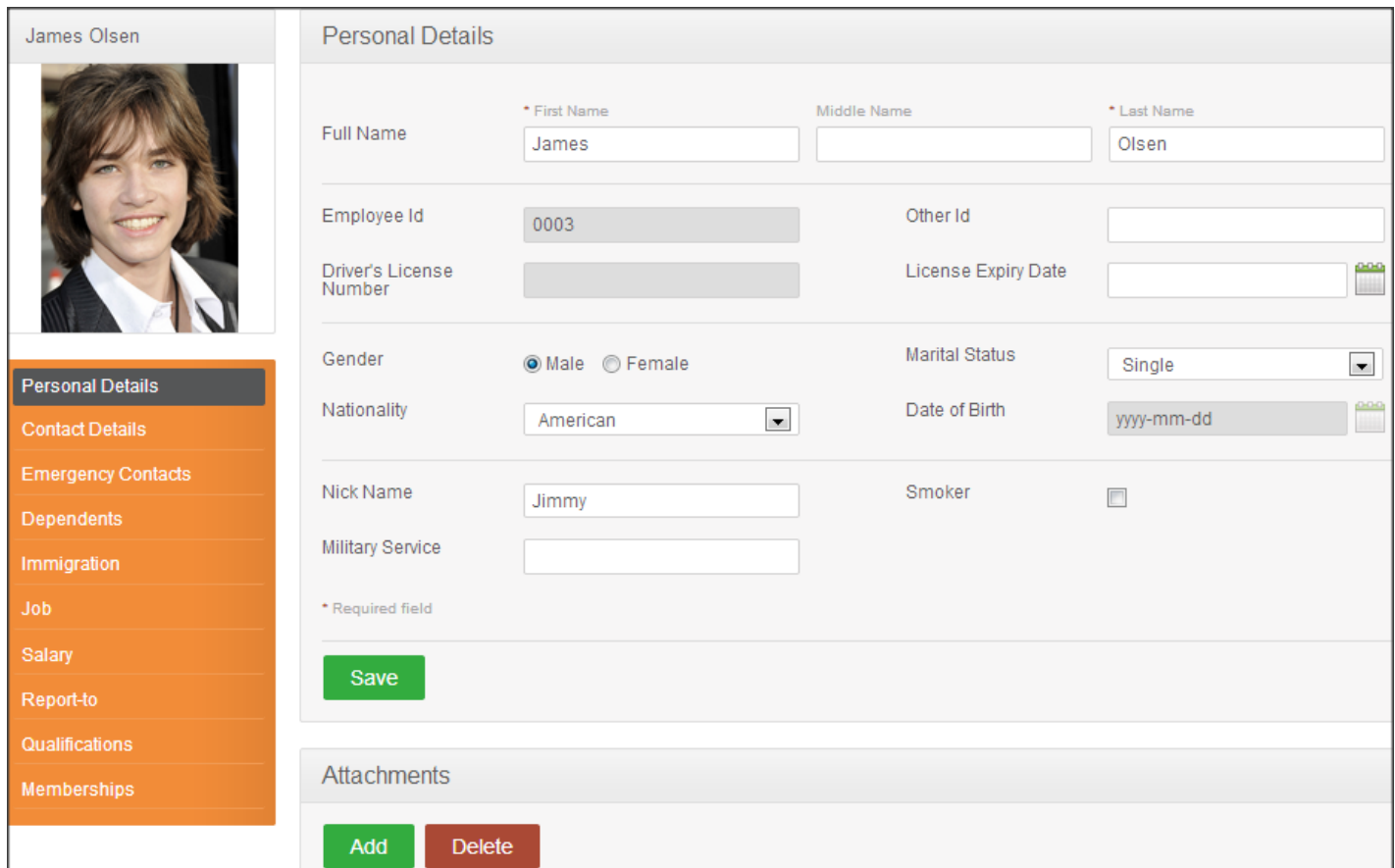
The functionality of this module spans through the entire system, making information available anywhere, anytime. All information is subject to company's defined security policy, where he/she can only view the information he/she is authorized to. An ESS-User can only edit certain fields in the ESS Module, maintaining the security and confidentiality of employee information.

A summary of the changes that an ESS Employee can make is shown in the Table below:

	Permissions	
Section	Modify	Read-Only
Personal Details	1) Full Name (First Name, Middle Name, Last Name) 2) Other ID 3) License Expiry Date 4) Gender 5) Nationality 6) Marital Status 7) Nick Name 8) Military Service 9) Smoker (Optional field)	1) Employee ID 2) Driver's License Number 3) SSN Number (Optional field) 4) SIN Number (Optional field) 5) Date Of Birth
Photograph	Upload your photograph. Accepts jpg, .png, .gif up to 1MB. Recommended dimensions: 200px X 200px	--
Contact Details	All fields.	--
Emergency Contacts	All fields.	--
Dependents	All fields.	--
Immigration	All fields.	--
Job	--	All fields.
Salary	--	All fields.
Report-to	--	All fields.
Qualifications	All fields.	--
Membership	All fields.	--
Training Details	1) Feedback	1) ID 2) Description 3) Status 4) Rating

3.1 Personal Details

When an ESS-User logs into the system for the first time, the first thing they will see is the “Personal Details” screen as shown in Figure 1.1. They are able to edit and enter certain fields.



James Olsen

Personal Details

Full Name: * First Name: James Middle Name: Last Name: Olsen

Employee Id: 0003 Other Id:

Driver's License Number: License Expiry Date:

Gender: ☒ Male ☐ Female Marital Status: Single

Nationality: American Date of Birth: yyyy-mm-dd

Nick Name: Jimmy Smoker: ☐

Military Service:

* Required field

Save

Attachments

Add Delete

Figure 1.1: Personal Details

The following are restricted fields where an ESS-User cannot make changes to the following details and need to be populated by the HR Admin and the respective ESS-Supervisor.

Personal Details

- Employee ID
- SSN No
- SIN No
- Driver License No
- Date of Birth

3.2 Photograph

The ESS-User can add a photograph of himself/herself by clicking on the photograph at corner of the screen and the screen as shown in Figure 1.2 will appear.

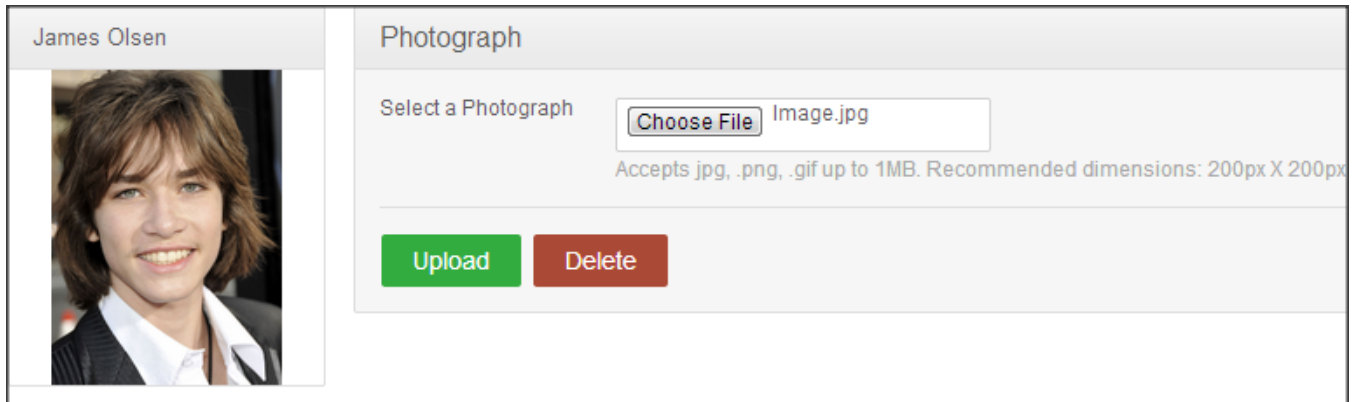


Figure 1.2: Photograph

Click “Browse” and then select a photograph from the relevant path. Click “Upload” once you have selected the picture .The picture selected will be populated on the photograph section.

***Note:** You may only upload a maximum size of 1 Megabyte in jpg, png, gif format.

3.3 Contact Details

Contact information can be entered from here. Click on “Contact Details” under the Employee Details column and the screen as shown in Figure 1.3 will appear.

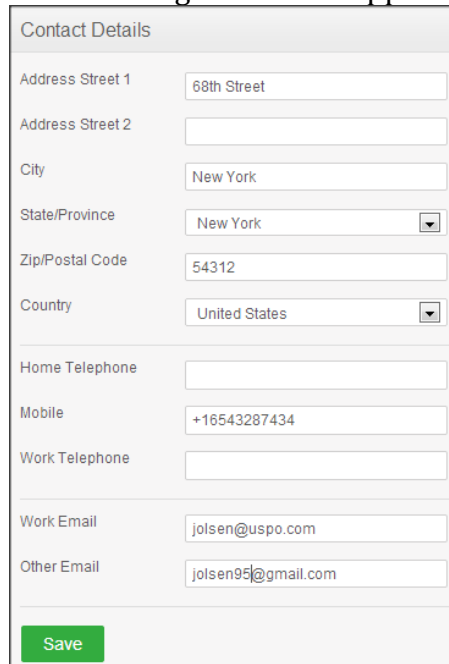


Figure 1.3: Contact Details



Click “Edit” to enter the information.

You can edit the following:

- Country – Select the country from the drop down
- Street 1
- Street 2
- City/Town
- State/Province – If the country is United States you can select from the drop down or you need to enter it manually
- ZIP Code
- Home Telephone
- Mobile
- Work Telephone
- Work Email
- Other Email

Once you have completed this form click “Save”.

3.4 Emergency Contact

Contact details which will be needed during an emergency can be entered here. Select “Emergency Contacts” on the “Personal” column and the screen as shown in Figure 1.4 will appear.

A screenshot of a web form titled "Add Emergency Contact". The form has a light gray background and a white border. It contains several input fields: "Name *" with the value "Nicole Olsen", "Relationship *" with the value "Sister", "Home Telephone" with the value "+16532546321", "Mobile" (empty), and "Work Telephone" (empty). Below the fields is a small text label "*Required field". At the bottom of the form are two buttons: a green "Save" button and a gray "Cancel" button.

Figure 1.4: Add Emergency Contact

Enter the “Name” of the person you wish the company to contact in case of emergency, your “Relationship” with 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 1.5

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		
<input type="checkbox"/>	Nicole Olsen	Sister	+16532546321		

Attachments

Add

Figure 1.5: Assigned Emergency Contacts

You may add multiple entries of emergency contacts.

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”.

3.5 Dependents

If you have any dependents you can enter them here. To add a dependent, click on “Dependents” under the “Personal” column and the screen as shown in Figure 1.6 will appear.

Add Dependent

Name *

Mary O'Connor

Relationship *

Other

Please Specify *

Wife

Date of Birth

1988-04-02

*Required field

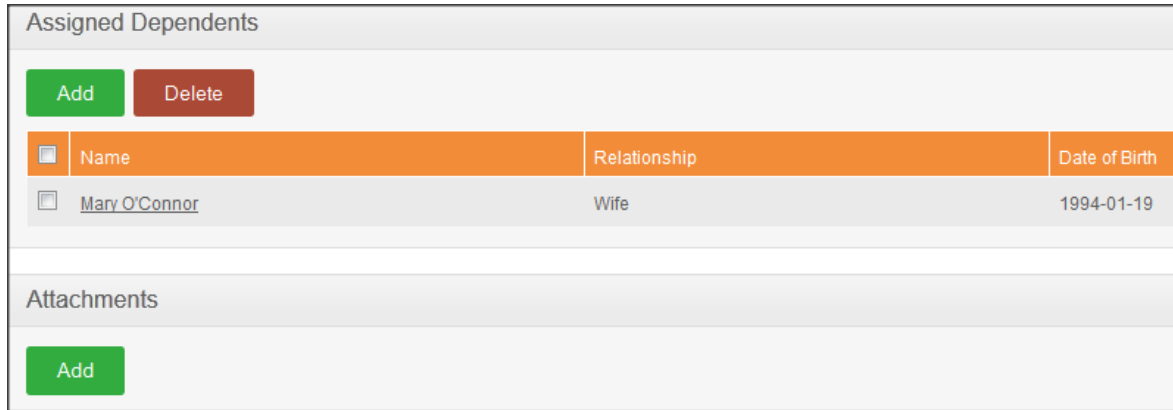
Save

Cancel

Figure 1.6: Add Dependents

Enter the “Name” of your dependent, the “Relationship” of the dependent to you and his/her “Date of Birth”.

Click “Save” once you have entered the following fields and your dependent will be listed as shown in Figure 1.7.



The form titled "Assigned Dependents" contains two buttons at the top: "Add" (green) and "Delete" (red). Below these is a table with three columns: "Name", "Relationship", and "Date of Birth". The first row of the table shows a dependent named "Mary O'Connor" with the relationship "Wife" and a date of birth "1994-01-19". Each row has a small checkbox to its left. Below the table is a section titled "Attachments" with a single "Add" button.

Figure 1.7: Assigned Dependents

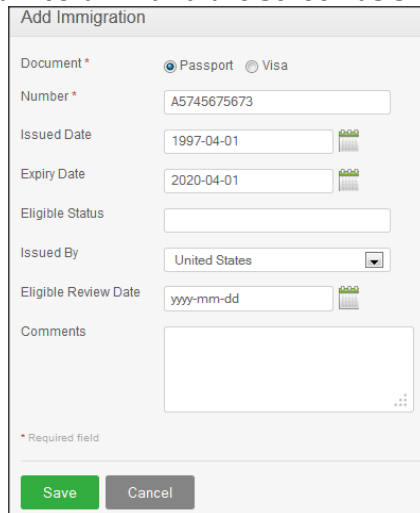
You may add multiple entries of dependants.

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 uploading the following file by clicking “Upload”.

3.6 Immigration

Your immigration information can be entered here. To add your immigration information, select “Immigration” under the “Personal” column and the screen as shown in Figure 1.8 will appear.



The form titled "Add Immigration" contains the following fields: "Document *" with radio buttons for "Passport" (selected) and "Visa"; "Number *" with the value "A5745675673"; "Issued Date" with the value "1997-04-01"; "Expiry Date" with the value "2020-04-01"; "Eligible Status" (empty); "Issued By" with a dropdown menu showing "United States"; "Eligible Review Date" with the placeholder "yyyy-mm-dd"; and a "Comments" text area. A legend indicates that an asterisk (*) denotes a required field. At the bottom are "Save" and "Cancel" buttons.

Figure 1.8: 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 your 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 1.9.

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 1.9: 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 uploading the following file by clicking “Upload”.

3.7 Job

The ESS-User cannot make changes in the job details. You are only able to view your job details that have been pre-defined by the administrator as shown in Figure 2.0. You are restricted from editing the following fields:

- Job Title
- Jobs Specification
- Employment Status
- Job Category
- Joined Date
- Sub Unit
- Location

- Employment Contract Start Date
- Employment Contract End Date
- Attachments

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
Attachments	

Figure 2.0: Job Details

3.8 Salary

The salary information field is completely hidden from the ESS-User as shown in Figure 2.1. Only the HR Admin has access to this information and has to be manually communicated to the ESS-User. You are restricted from editing the following fields:

Salary

- Salary Component
- Pay Frequency
- Currency
- Amount
- Comments
- Direct Deposit Details
- Attachments

Assigned Salary Components

Salary Component	Pay Frequency	Currency	Amount	Comments	Show Direct Deposit Details
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

Figure 2.1: Salary Details

3.9 Report To

As an ESS-User, you are only able to view the list of supervisors that you report to and if you are an ESS-Supervisor as well, you will see the list of your subordinates as shown in Figure 2.2.

You are restricted from editing the following fields:

- Assigned Supervisors
- Assigned Subordinates
- Attachments

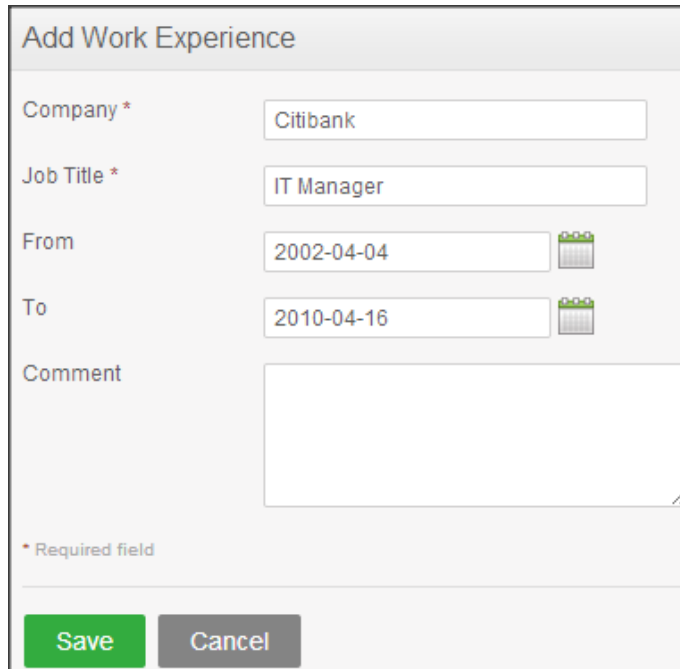
Assigned Supervisors	
Name	Reporting Method
Kevin Ryan	Direct
Assigned Subordinates	
Name	Reporting Method
No Records Found	

Figure 2.2: ESS User View of Assigned Supervisors

3.10 Qualifications

Work Experience

Your previous work experiences can be entered here. To enter previous work experiences, click “Add” under “Work Experience” and the screen as shown in Figure 2.3 will appear.



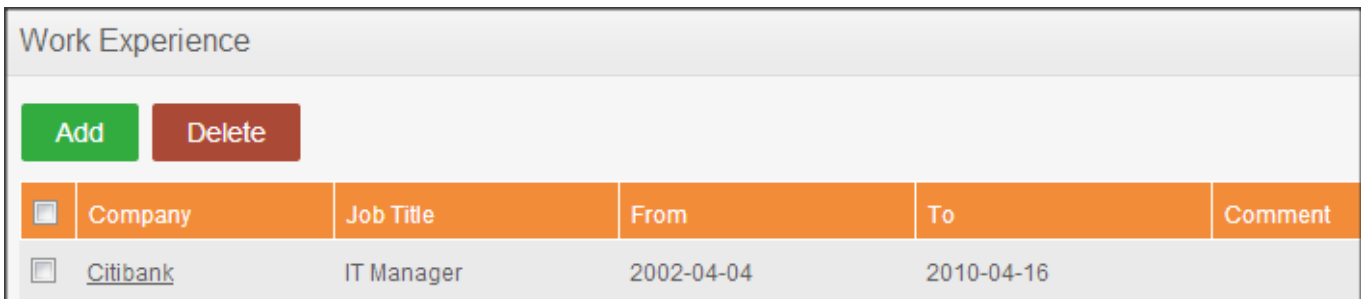
The form titled "Add Work Experience" contains the following fields:

- Company ***: Text input field containing "Citibank".
- Job Title ***: Text input field containing "IT Manager".
- From**: Date input field containing "2002-04-04".
- To**: Date input field containing "2010-04-16".
- Comment**: Text area for additional information.

At the bottom, there are "Save" and "Cancel" buttons. A legend indicates that an asterisk (*) denotes a required field.

Figure 2.3: Add Work Experience

Click “Save” once all the fields are entered and the particular work experience will be listed as shown in Figure 2.4.



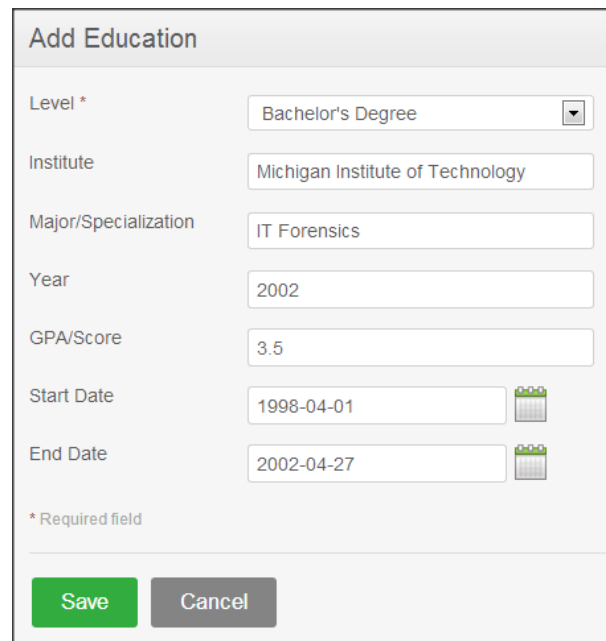
Work Experience					
<input type="button" value="Add"/> <input type="button" value="Delete"/>					
<input type="checkbox"/>	Company	Job Title	From	To	Comment
<input type="checkbox"/>	Citibank	IT Manager	2002-04-04	2010-04-16	

Figure 2.4: Work Experience List

You may enter multiple entries of work experience.

To delete an entry, click on the check box next to a 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 are able to enter details of your education here. To enter education details, click “Add” under “Education” and the screen as shown in Figure 2.5 will appear.



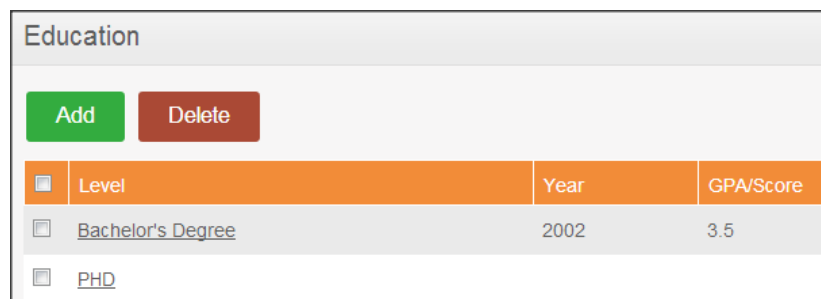
The 'Add Education' form contains the following fields:

- Level ***: A dropdown menu with 'Bachelor's Degree' selected.
- Institute**: A text input field containing 'Michigan Institute of Technology'.
- Major/Specialization**: A text input field containing 'IT Forensics'.
- Year**: A text input field containing '2002'.
- GPA/Score**: A text input field containing '3.5'.
- Start Date**: A date picker showing '1998-04-01'.
- End Date**: A date picker showing '2002-04-27'.

At the bottom, there is a legend indicating that an asterisk (*) denotes a required field. Below the legend are two buttons: a green 'Save' button and a grey 'Cancel' button.

Figure 2.5: Add Education

Click “Save” once all the fields are entered and the particular education details will be listed as shown in Figure 2.6.



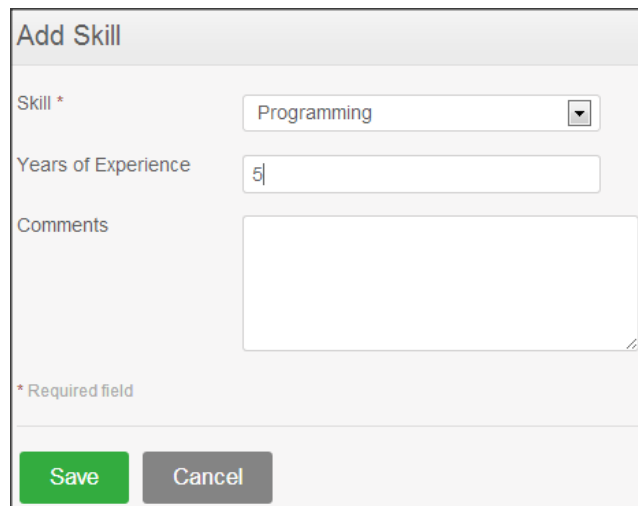
Education			
<div> <div>Add</div> <div>Delete</div> </div>			
<input type="checkbox"/>	Level	Year	GPA/Score
<input type="checkbox"/>	<u>Bachelor's Degree</u>	2002	3.5
<input type="checkbox"/>	<u>PHD</u>		

Figure 2.6: Education history

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”.

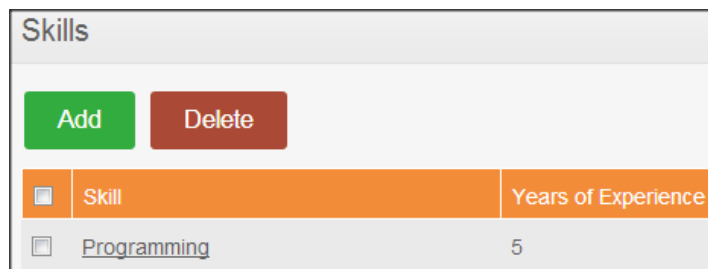
If you have any special talents or skills they can be entered here. To enter skills, click “Add” under “Skills” and the screen as shown in Figure 2.7 will appear.

A form titled "Add Skill" with three input fields: "Skill *" with a dropdown menu showing "Programming", "Years of Experience" with a text box containing "5", and "Comments" with a large text area. At the bottom, there are "Save" and "Cancel" buttons. A note "* Required field" is located above the buttons.

Add Skill	
Skill *	Programming
Years of Experience	5
Comments	
* Required field	
Save	Cancel

Figure 2.7: Add Skill

Click “Save” once all the fields are entered and the particular skill will be listed as shown in Figure 2.8.

A table titled "Skills" with two buttons, "Add" and "Delete", at the top. Below the buttons is a table with two columns: "Skill" and "Years of Experience". The first row of data shows "Programming" and "5".

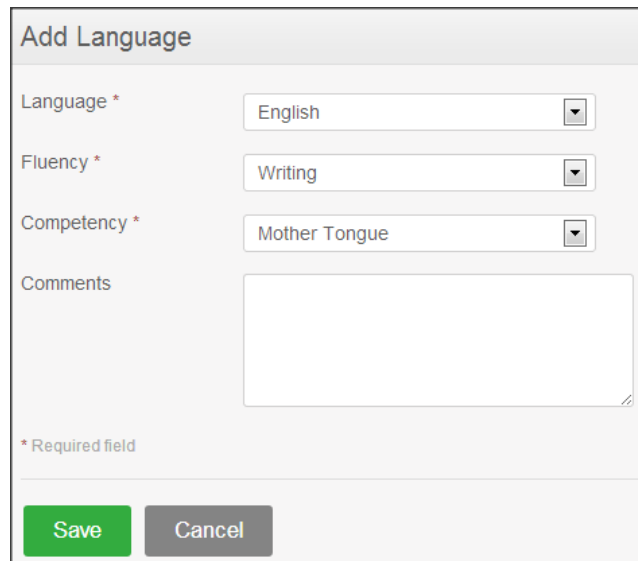
Skills	
Add	Delete
<input type="checkbox"/>	
Skill	Years of Experience
<input type="checkbox"/> Programming	5

Figure 2.8: List of 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”.

You can enter the various languages that you are competent in, with the level of competency. To enter your language of competency, click “Add” under “Language” and the screen as shown in Figure 2.9 will appear.

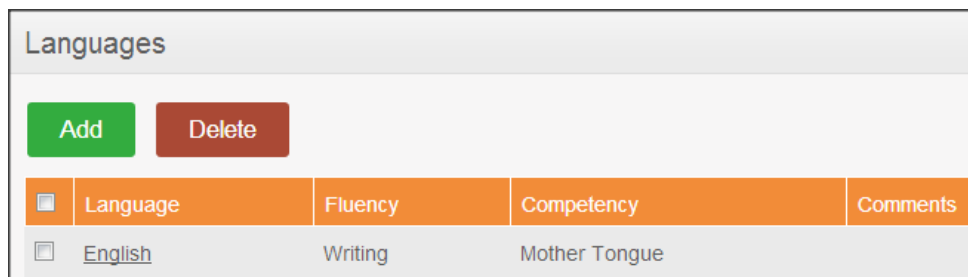


The 'Add Language' form contains the following fields:

- Language ***: A dropdown menu with 'English' selected.
- Fluency ***: A dropdown menu with 'Writing' selected.
- Competency ***: A dropdown menu with 'Mother Tongue' selected.
- Comments**: A large text area for additional notes.
- * Required field**: A note indicating that the Language, Fluency, and Competency fields are mandatory.
- Buttons**: 'Save' (green) and 'Cancel' (grey).

Figure 2.9: Add Language

Click “Save” once all the fields are entered and the particular language of competency will be listed as shown in Figure 3.0.



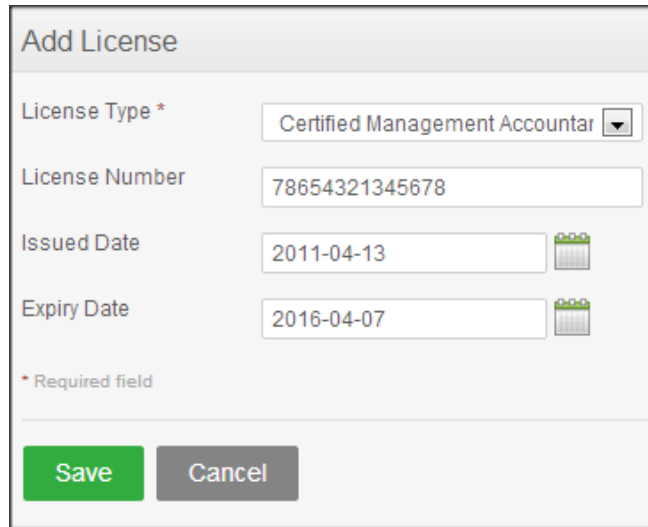
Languages				
<input type="button" value="Add"/> <input type="button" value="Delete"/>				
<input type="checkbox"/>	Language	Fluency	Competency	Comments
<input type="checkbox"/>	English	Writing	Mother Tongue	

Figure 3.0: List of Languages of Competency

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”.


Here you can enter the licenses that you may have. To enter licenses, click “Add” under “License” and the screen as shown in Figure 3.1 will appear.




Add License

License Type * Certified Management Accountant ▼

License Number 78654321345678

Issued Date 2011-04-13 

Expiry Date 2016-04-07 

* Required field

Save Cancel

Figure 3.1: Add License

Click “Save” once all the fields are entered and the particular license will be listed as shown in Figure 3.2

License			
Add Delete			
<input type="checkbox"/>	License Type	Issued Date	Expiry Date
<input type="checkbox"/>	Certified Management Accountant (CMA)	2011-04-13	2016-04-07
<input type="checkbox"/>	Oracle Certified Professional Java SE Programmer	2013-04-10	2019-04-25

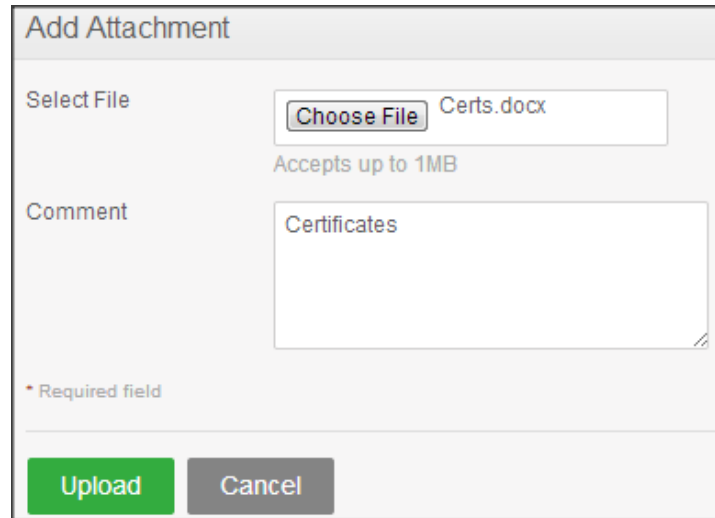
Figure 3.2: List of Licenses

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”.

Any supporting documents regarding your qualification that you think is needed by the management can be attached here. Please note that each document cannot exceed 1 megabyte, but you can attach more than one document. To add an attachment, click “Add” under attachment and the screen as shown in Figure 3.3 will appear.

Click “Browse” and select the file from the relevant path and click “Upload” to upload it.



The form titled "Add Attachment" contains a "Select File" section with a "Choose File" button and a text input field containing "Certs.docx". Below this is a note "Accepts up to 1MB". The "Comment" section has a text area with "Certificates". A red asterisk and the text "Required field" are at the bottom left. At the bottom are "Upload" and "Cancel" buttons.

Figure 3.3: Add Attachment

Once you have uploaded the file, the file will be listed as shown in Figure 3.4

Attachments							
Add		Delete					
<input type="checkbox"/>	File Name	Description	Size	Type	Date Added	Added By	
<input type="checkbox"/>	Certs.docx	Certificates	9.93 k	application/vnd.openxmlformats-officedocument.wordprocessingml.document	2013-04-10	Kevin	Edit

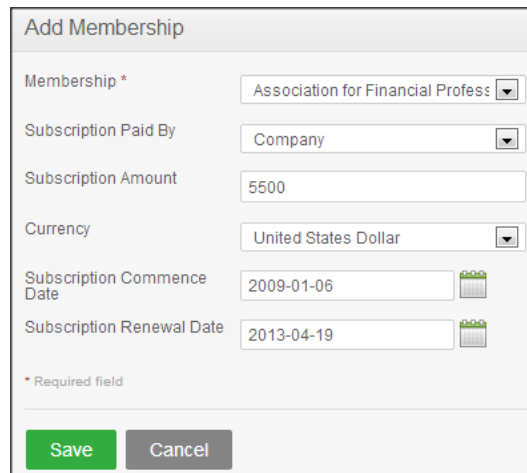
Figure 3.4: List of Attachments

You may upload multiple attachments.

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

3.11 Membership

If you are a members of any committee, institute etc. those details can be entered here. To enter membership details, go to **My Info>>Personal>>Membership** and click “Add” and the screen as shown in Figure 3.5 will appear.



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

- Membership ***: Association for Financial Professions (dropdown)
- Subscription Paid By**: Company (dropdown)
- Subscription Amount**: 5500 (text input)
- Currency**: United States Dollar (dropdown)
- Subscription Commence Date**: 2009-01-06 (calendar icon)
- Subscription Renewal Date**: 2013-04-19 (calendar icon)

At the bottom, there are "Save" and "Cancel" buttons. A note indicates that fields with an asterisk are required.

Figure 3.5: Add Membership Details

Click “Save” once all the fields are entered and the particular membership detail will be listed as shown in Figure 3.6.

Assigned Memberships						
<input type="button" value="Add"/> <input type="button" value="Delete"/>						
<input type="checkbox"/>	Membership	Subscription Paid By	Subscription Amount	Currency	Subscription Commence Date	Subscription Renewal Date
<input type="checkbox"/>	Association for Financial Professionals (AFP)	Company	5500.00	USD	2009-01-06	2013-04-19

Figure 3.6: 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”.

4.0 Leave Module

The leave module is a comprehensive leave management system where an employee can apply for leave via online (internet/intranet). Email will be sent to notify the Admin and the relevant supervisors who can then approve/reject the leave.

The ESS- User is able to view their current leave entitlement, leave balance and notification of leave approval by their supervisors or the Admin.

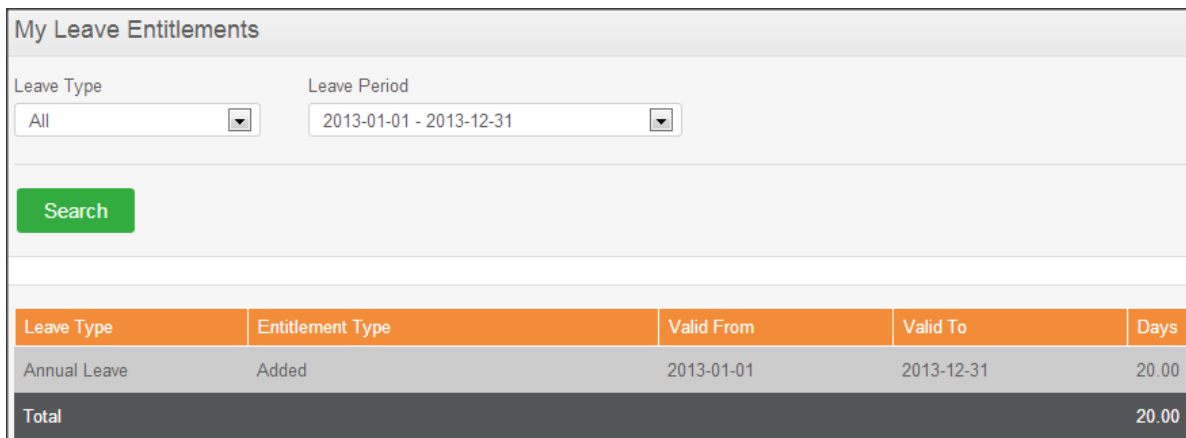
The ESS-User will be able to view the following on the Leave Module which will further be explained in detail:

- Entitlements
- Reports
- My Leave
- Apply

4.1 Entitlements

This feature allows you to view your leave entitlement for all leave types (Leave>> Entitlements >> My Entitlements), and a screen as shown in Figure 3.7 will appear.

You can search by “Leave Type” or “Leave Period”. Clicking “Search” will show all available leave entitlements as shown in Figure 3.7.



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

Figure 3.7: ESS User - My Entitlements

4.2 Reports

The report feature allows users to generate Leave Entitlement and Usage Reports. The user will need to navigate to **Leave>>Reports>> My Leave Entitlements and Usage Report**.



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 3.7.1.

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	20.00	9.38	0.00	0.00	10.63
Sick Leave	0.00	0.00	0.00	0.00	0.00

Figure 3.7.1: ESS User - My Entitlements

4.3 My Leave

Your personal leave request details can be viewed here. To view your leave requests details, go to **Leave>> My Leave** and the screen as shown in Figure 3.8 will appear.

My Leave List

From

2013-01-01

To

2014-12-31

Show Leave with Status All Rejected Cancelled Pending Approval Scheduled Taken

SearchReset

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
2013-04-12 to 2013-04-24	James Olsen	Annual Leave	11.00	9.00	Pending Approval(9.00)		Select Action

Save

Figure 3.8: My Leave Details



You can view leave using the search toolbar as shown in Figure 4.5 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

By clicking on your name under “Employee Name” you will be able to access your PIM records.

To perform an action on the leave request click on the “Action” drop down and select “Cancel”. Click “Save” to confirm action.

You can view complete details of your leave by clicking on the “Date” or “Status” of your leave request and the screen as shown in Figure 3.9.

My Leave Details						
View Leave Request Comments						
Date	Leave Type	Leave Balance (Days)	Duration (Hours)	Status	Comments	Actions
2013-04-12	Annual Leave	11.00	8.00	Pending Approval		Select Action ▼ Select Action Cancel
2013-04-13		11.00		Weekend		
2013-04-14		11.00		Weekend		
2013-04-15	Annual Leave	11.00	8.00	Pending Approval		Select Action ▼
2013-04-16	Annual	11.00	8.00	Pending Approval		Select Action ▼

Figure 3.9: My Leave Details

You may perform an action on your individual leave request on per day basis by selecting from the “Action” drop down menu. Select “Cancel” to cancel the leave request and click “Save”.

4.4 Apply

You are able to apply for a specific leave type through this feature depending on your leave entitlement. To apply for a specific leave type, go to **Leave>>Apply** and the screen shown as shown in Figure 4.0 will appear.

Apply Leave

Leave Type *

Leave Balance 13.00 [view details](#)

From Date *

To Date *

Duration

Comment

* Required field

Figure 4.0: Apply for Leave

Select the leave type from the drop down menu and the “From Date” and “To Date” you prefer the leave to be taken, either you can select range of days or same day, if it is for the same day, the duration field will be enabled, which allows you to apply for half day or partial day leave (morning or afternoon) and also you can add a comment on why you need the leave if necessary. The system also shows the remaining leave balance for the specific leave type.

Once you have filled in the details click “Apply” and a mail will be sent to the Supervisor and the Admin for approval. The status of your leave application can be seen in “My Leave” as shown in Figure 4.1.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
2013-04-26	James Olsen	Annual Leave	10.63	0.38	Pending Approval(0.38)	Half day leave.	Select Action
2013-04-12 to 2013-04-24	James Olsen	Annual Leave	10.63	9.00	Pending Approval(9.00)		Select Action

Figure 4.1 My Leave Request

5.0 Time Module

The module automates time tracking related processes of an ESS-User. The functionality of this module is to allow the ESS-User to enter and submit their timesheet and enter their punch in/punch out time which enhances the organization's performance by eliminating paperwork and manual processes associated with time and attendance needs.

The ESS-User will be able to view the following in the Time Module which will further be explained in detail:

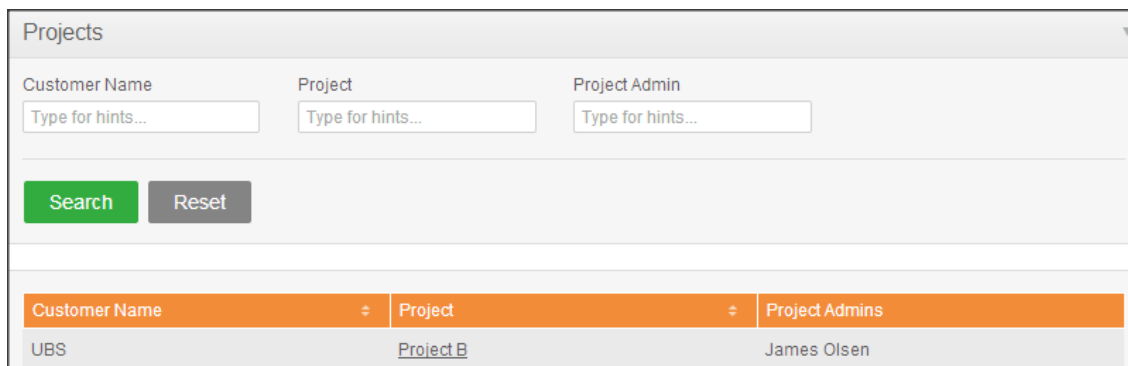
- Project Info
- Timesheet
 - My Timesheet
- Attendance
 - My Records
 - Punch-In/Out

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

5.1 Project Info

If an ESS user has been assigned to a project as a Project Admin, he/she can access the Admin module to view the projects that he/she has been assigned to and the screen as shown in Figure 4.2 will appear.

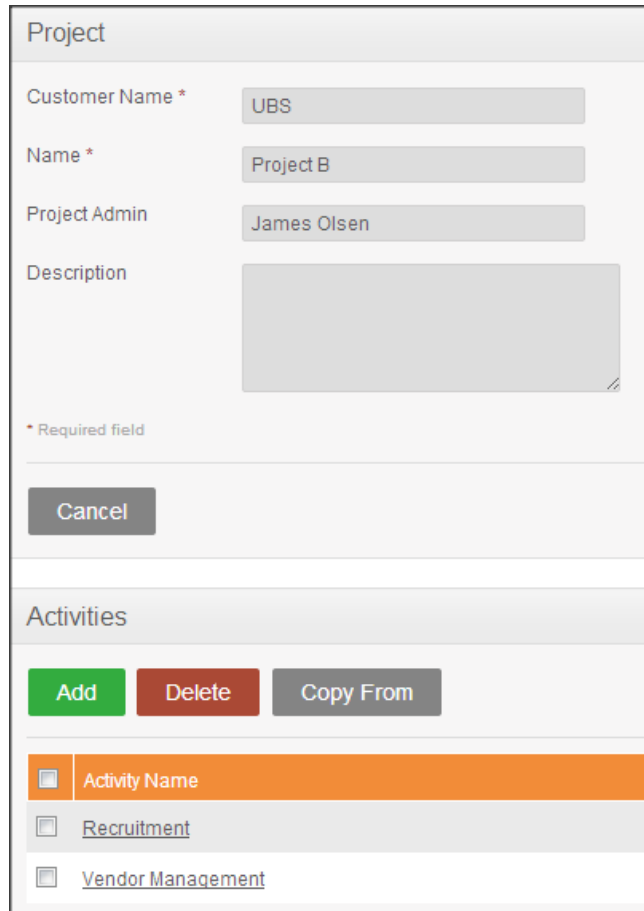


The screenshot shows a web interface for the 'Projects' module. At the top, there's a header 'Projects' with a dropdown arrow. Below it, there are three search filters: 'Customer Name', 'Project', and 'Project Admin', each with a text input field containing 'Type for hints...'. Under these filters are two buttons: a green 'Search' button and a grey 'Reset' button. Below the buttons is a table with three columns: 'Customer Name', 'Project', and 'Project Admins'. The first row of data shows 'UBS' under Customer Name, 'Project B' under Project, and 'James Olsen' under Project Admins.

Customer Name	Project	Project Admins
UBS	Project B	James Olsen

Figure 4.2: Projects

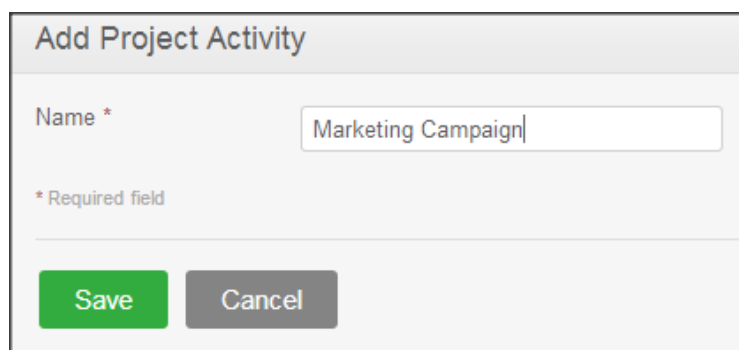
The Project admin can view the project details by clicking on the relevant Project and the screen as shown in Figure 4.3 will appear.



The 'Project Details' form is divided into two main sections. The top section, titled 'Project', contains four input fields: 'Customer Name *' with the value 'UBS', 'Name *' with the value 'Project B', 'Project Admin' with the value 'James Olsen', and a larger 'Description' text area. Below these fields is a legend indicating that an asterisk (*) denotes a required field. A 'Cancel' button is positioned at the bottom of this section. The bottom section, titled 'Activities', features three buttons: 'Add' (green), 'Delete' (red), and 'Copy From' (grey). Below the buttons is a table with three rows. The first row has an orange header with a checkbox and the text 'Activity Name'. The second row has a checkbox and the text 'Recruitment'. The third row has a checkbox and the text 'Vendor Management'.

Figure 4.3: Project Details

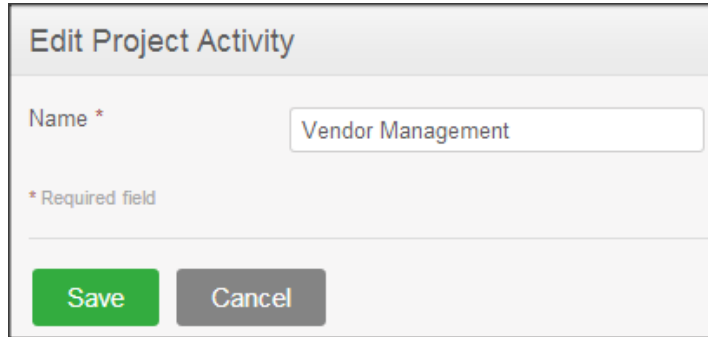
The project admin cannot edit project details. He/she can add project activities by clicking on “Add” and the screen as shown in Figure 4.4 will appear.



The 'Add Project Activity' form is a simple input form. It has a title bar 'Add Project Activity'. Below it is a single input field labeled 'Name *' containing the text 'Marketing Campaign'. A legend below the field indicates that an asterisk (*) denotes a required field. At the bottom of the form are two buttons: 'Save' (green) and 'Cancel' (grey).

Figure 4.4: Add Project Activity

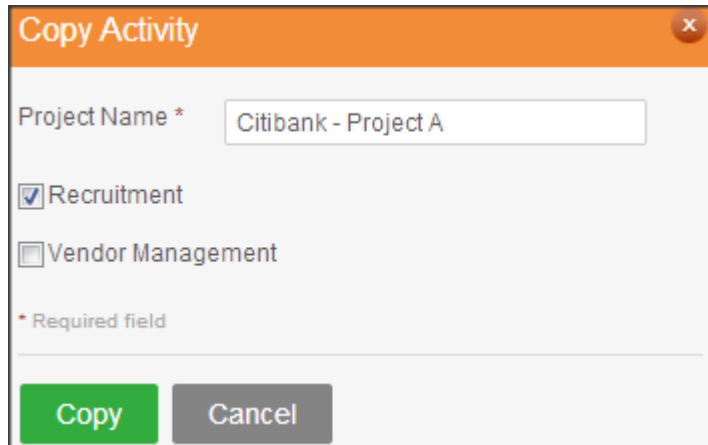
To edit a project activity, click on the relevant project activity and the screen as shown in Figure 4.5 will appear.



The dialog box is titled "Edit Project Activity". It contains a text input field labeled "Name *" with the text "Vendor Management" entered. Below the input field is a small red asterisk and the text "* Required field". At the bottom of the dialog are two buttons: a green "Save" button and a grey "Cancel" button.

Figure 4.5: Edit Project

You may copy project activities from another project by clicking "Copy From" and the screen as shown in Figure 4.6 will appear. The relevant "Project Name" needs to be entered, after which the "Activities" related to that project will appear. Select the Activity that you wish to copy, and click "Copy".



The dialog box is titled "Copy Activity" with an orange header bar. It contains a text input field labeled "Project Name *" with the text "Citibank - Project A" entered. Below the input field is a small red asterisk and the text "* Required field". There are two checkboxes: "Recruitment" which is checked, and "Vendor Management" which is unchecked. At the bottom of the dialog are two buttons: a green "Copy" button and a grey "Cancel" button.

Figure 4.6: Copy Activity

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".

5.2 Timesheets

Entering and Submitting a Timesheet

The ESS-User will be able to enter and submit his timesheet for a particular project he/she was assigned to. To enter a timesheet, go to **Time>> Timesheets>> My Timesheets** and the screen as shown in Figure 4.7 will appear.

Timesheet for Week

2013-04-08 to 2013-04-14

[Add Timesheet](#)

Project Name	Activity Name	Mon 8	Tue 9	Wed 10	Thu 11	Fri 12	Sat 13	Sun 14	Total
No Records Found									

Status: Not Submitted

Edit
Submit

Figure 4.7: 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 4.7.

***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 that you have opened.

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 4.8 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

Save
Add Row
Remove Rows
Reset
Cancel

Figure 4.8: Edit Timesheet

The following options are available when editing the timesheet:

- **Cancel:** allows the user to cancel any changes made in the timesheet.
- **Save:** allows the user to save any changes made in the timesheet.
- **Add Row:** allows the user to enter another row to enter details of project activities and the corresponding times spent.
- **Remove Rows:** allows the user to delete a row by clicking on the selected check box and clicking “Remove Row”.
- **Reset:** allows the user to reset the details entered and enter new timesheet details.



You can select from the “Project Name” and “Activity Name” that was assigned to you and enter the number of hours you have 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 check box beside the project name before you click “Save” to save the particular records and the screen as shown in Figure 4.9 will appear.

***Note:** You need to be assigned to a project first to enter your details in your timesheet.

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 Edit Submit

Figure 4.9: 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 5.0 will appear. Click on the check box 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

Save Add Row Remove Rows Reset Cancel

Figure 5.0: 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 5.1.

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
[Edit](#)

Actions Performed on the Timesheet

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

Figure 5.1: Submit Timesheet

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

Timesheet Approval/Rejection/Edit

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 your supervisor.

The ESS-User may edit a submitted timesheet by clicking on “Edit” as shown in Figure 5.2. The Admin or the ESS-Supervisor may either Approve/Reject/Edit the submitted timesheet.

Timesheet for Week
2013-04-08 to 2013-04-14
[Add Timesheet](#)

Project Name	Activity Name	Mon 8	Tue 9	Wed 10	Thu 11	Fri 12	Sat 13	Sun 14	Total
Citibank - Project A	Recruitment	4:00	5:00	4:00	5:00	5:00	0:00	0:00	23:00
Total		4:00	5:00	4:00	5:00	5:00	0:00	0:00	23:00

Status: Not Submitted
[Edit](#)
[Submit](#)

Figure 5.2: Edit Timesheet

Once the submitted timesheet has been “Approved” the ESS-User will be notified and cannot make any changes to the timesheet submitted.

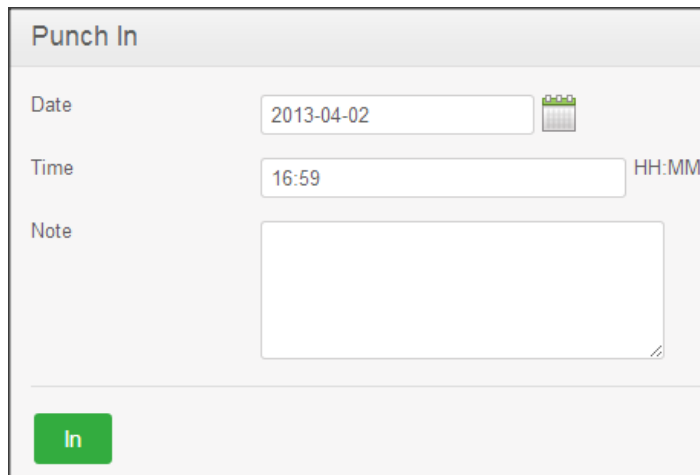
However if the submitted timesheet has been “Rejected”, the ESS-User will be notified and is able to “Edit” the timesheet and re-submit the timesheet for approval.

5.3 Attendance

This feature allows the ESS-User to record his attendance by entering his punch in and punch out time as well as his attendance details.

Punch In/Punch Out

This feature allows capturing the number of hours that you have spent while working for the company. To access the Punch In/Out tab, go to **Time>> Attendance>>Punch In/Out** and the screen as shown in Figure 5.3 will appear.

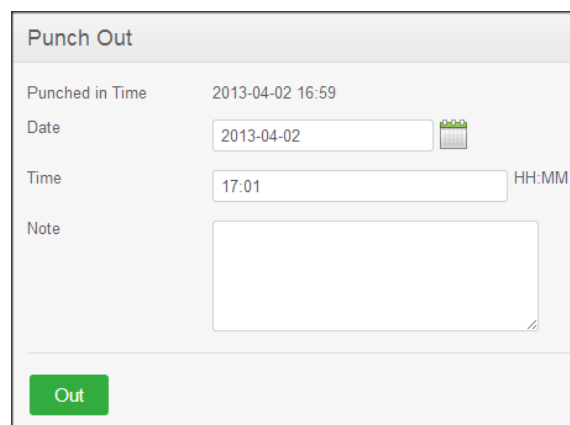


The 'Punch In' form is a web-based interface for recording attendance. It features a title bar 'Punch In' at the top. Below the title bar, there are three input fields: 'Date' with a calendar icon, 'Time' with a clock icon and 'HH:MM' label, and a 'Note' text area. The 'Date' field is pre-filled with '2013-04-02' and the 'Time' field is pre-filled with '16:59'. At the bottom of the form, there is a green button labeled 'In'.

Figure 5.3: Punch In

***Note:** If the HR Admin has configured the attendance settings, the “Time” and “Date” for both punch in/out could be modified, otherwise the system will automatically capture the “system date/time” and it cannot be modified.

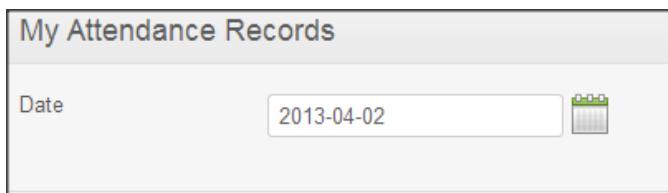
Enter the relevant fields and click “In”. The screen as shown in Figure 5.4 will then appear. The details of your last punch in time will be populated below the screen as shown in Figure in 5.4. To punch out, click “Out”.



The 'Punch Out' form is a web-based interface for recording attendance. It features a title bar 'Punch Out' at the top. Below the title bar, there are four input fields: 'Punched in Time' (pre-filled with '2013-04-02 16:59'), 'Date' with a calendar icon, 'Time' with a clock icon and 'HH:MM' label, and a 'Note' text area. The 'Date' field is pre-filled with '2013-04-02' and the 'Time' field is pre-filled with '17:01'. At the bottom of the form, there is a green button labeled 'Out'.

Figure 5.4: Punch Out

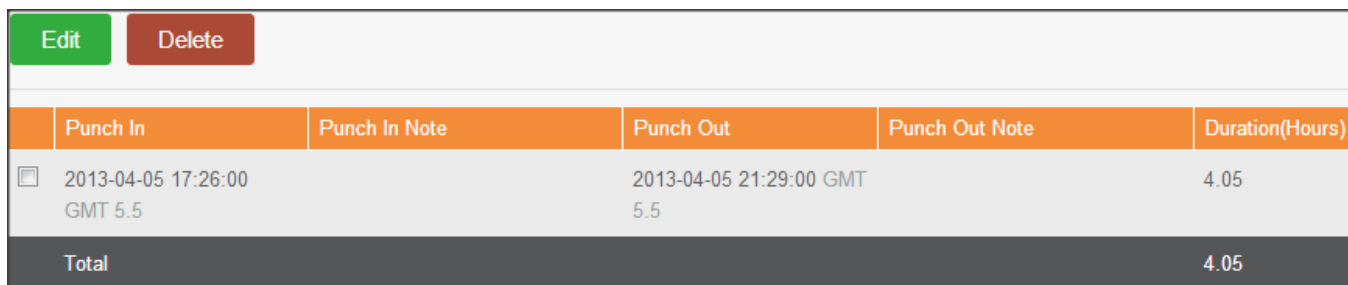
Once you have entered your punch In/Out times, it will be listed in your “My Records”. To view details, go to **Time>> Attendance>> My Records** and the screen as shown in Figure 5.5 will appear.



The screenshot shows a web interface titled "My Attendance Records". Below the title, there is a label "Date" followed by a text input field containing "2013-04-02" and a small calendar icon to its right.

Figure 5.5: View My Records

Enter the date you want the attendance record to be shown for and the screen as shown in Figure 5.6 will appear.



The screenshot shows a table with attendance records. At the top, there are two buttons: "Edit" (green) and "Delete" (red). The table has six columns: "Punch In", "Punch In Note", "Punch Out", "Punch Out Note", and "Duration(Hours)". The first row shows a record for 2013-04-05 with a duration of 4.05 hours. A checkbox is visible to the left of the first row. The second row is a "Total" row.

	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 5.6: “My Records” in Detail

***Note:** If the HR Admin has configured the attendance settings the following options, “Edit” and “Delete” could be seen and selected otherwise both options will not be visible.

To edit the record, click “Edit” and enter the information. To delete the record, click on the check box beside the record and click “Delete”.

6.0 Performance Module

6.1 My Reviews

The ESS-User will be able to view the scheduled performance review by his particular supervisor/reviewer. To view your performance review, go to **Performance>> Manage Reviews >> My Reviews** and the screen as shown in Figure 5.7 will appear.

My Review List					
Employee	Due Date	Review Period	Job Title	Review Status	Evaluation Status
Ashley Abel	2014-10-03	2014-10-01 - 2014-10-03	QA Level II	Approved	Completed

Figure 5.7: My Review Summary

You will see the “Review Period” that your supervisor/reviewer would be conducting the performance review, when the review is “Due” to be submitted and the “Status” of the review and the “Evaluation Status” of the review.

The outcome of the review will not be visible to the ESS-User.

6.2 My Trackers

Further, ESS-User will be able to view the trackers assigned for him. To view your trackers, go to **Performance>> My Trackers**, performance trackers will be listed and the screen as shown in Figure 5.8 will appear.

Performance Trackers			
Employee	Tracker	Added Date	Modified Date
James Abrahamson	Tracker for James	2014-10-22	

Figure 5.8: My Tracker List

6.3 Performance Trackers

This feature allows you to track an employee’s performance by adding a tracker log, positive/negative feedback and a comment. To track the performance, go to Performance>>My Trackers and click on tracker name and the screen as shown in Figure 5.9 will appear.

Manage Performance Tracker Log	
Log *	<input type="text" value="Punctuality"/>
Performance	<input type="text" value="Positive"/>
Comment *	<input type="text" value="I report to work on time."/>
* Required field	
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>

Figure 5.9: Manage Performance Tracker Log



Enter the following details and click “Save and the list of performance trackers will be listed as shown in Figure 6.0.

Performance Trackers			
Employee	Tracker	Added Date	Modified Date
James Abrahamson	Tracker for James	2014-10-22	

Figure 6.0: Performance Tracker List

7.0 Corporate Directory

Corporate directory is the place where users can view public information about the rest of the employees in the company, and can be accessed by clicking on “**Directory**” in the menu.

Search Directory

Name

Type for hints...

Job Title

All

Location

All


Search

Reset

1-50 of 81


1

2



Ryan Anderson

Pre-Sales Executive




Peter Mac Anderson

Finance Controller

HRD


212-876-0987, Peter@Mainoffice.com



Linda Anderson

Quality Control Engineer

Marketing



Nancy-Ming Boucher

Finance Manager

HRD

65-914-458-8765, Nancy-Ming@Mainoffice.com

Figure 6.1: Corporate Directory

Users can:

- Access the corporate directory – can be accessed by clicking on “**Directory**” in the main menu.
- Search listings –
 - The following search criteria are available
 - Name - Auto suggestion

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- Job Title - Auto suggestion
- Location - Drop Down
- View search results –
 - All employees are listed in a paginated view sorted by their last name.
 - The following information are considered public and displayed in directory listing:
#Image #Full name #Job Title #Subunit
#Location #Contact Number (work phone) #Email (work email)

8.0 Dashboard

The Dashboard is a page which provides:

- Quick access to certain tasks (Ex: Leave, Timesheet)
- Ideally, it tries to make important information available in one glance/ in one click
- Dashboard forms the Home page of every user, and can be accessed by clicking on “**Dashboard**”.

Figure 6.2 shows the Dashboard module.

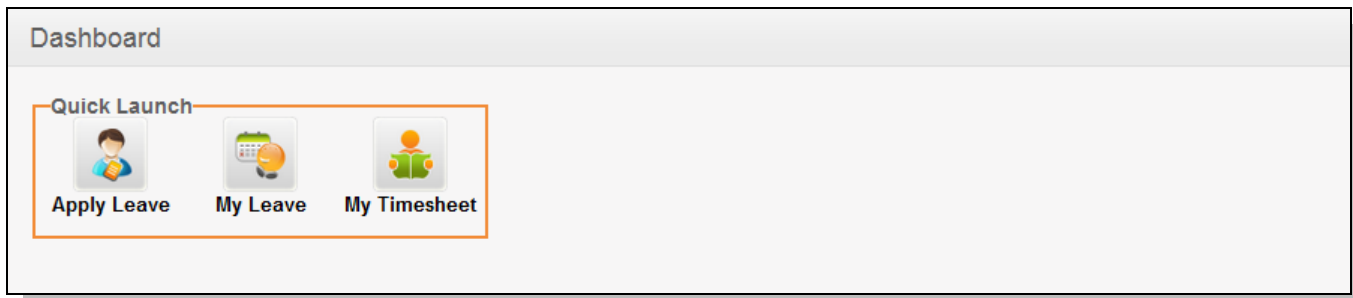


Figure 6.2: Dashboard

8.1 Quick Launch Panel

This panel contains some shortcuts for invoking certain menu items, as shown in Figure 6.3.

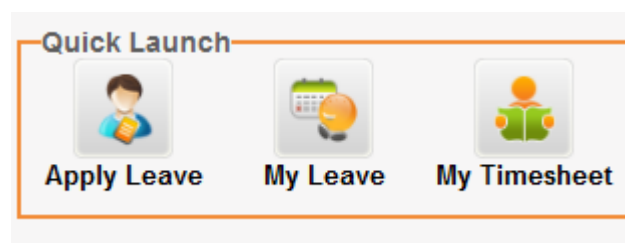


Figure 6.3: Quick Launch Panel



Following are the shortcuts shown for ESS users:

- Apply Leave
- My Leave
- My Timesheets

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