

ORANGEHRM

OrangeHRM Open Source Version

Quick Start Guide V-3.3.2

OrangeHRM Implementation Services

7/30/2015



Server Hardware/Software Requirements

- ✓ Processor - Intel Xeon 2.2GHz (Or equivalent AMD processor) higher
- ✓ Memory - 4 GB or higher
- ✓ Hard Disk - 100 GB or higher
- ✓ Apache HTTP Server 2.2.22 or later
- ✓ MySQL 5.5 or later
- ✓ PHP 5.4 or later

Client Hardware/Software Requirements

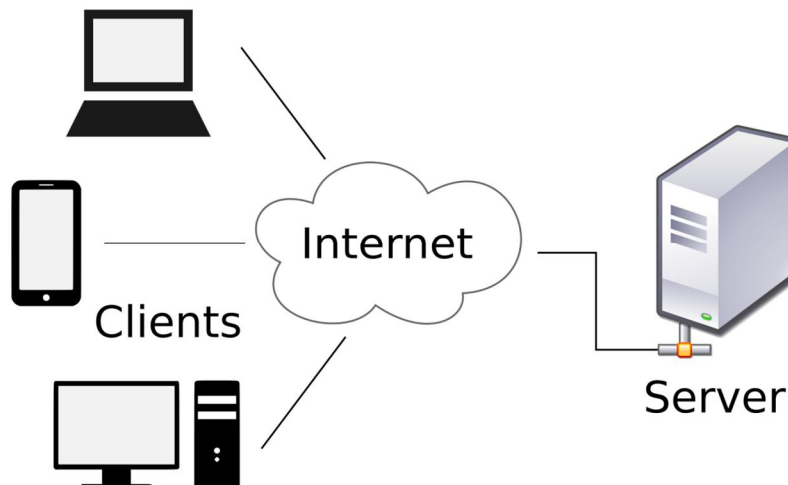
Any system capable of running a current version of Firefox, Internet Explorer, or Chrome.

Installation

OrangeHRM is very easy to install. Whether you use Windows or Linux, simply watch the video tutorial on the web-based installer, and you will have OrangeHRM running within minutes. Please visit the link below for detailed installation instructions.

[Installations Instructions](#)

OrangeHRM is a web based application and only requires a single installation on a server that meets the requirements specified above. The end users can then access the system via a web browser on any pc connected to the local network or the internet (provided the server has public access).



System Setup

After the installation is done, log into the system and navigate to Admin>>Organization>>General Information. Here add the information about the company.

For more information refer **page 19** of the Admin OS user guide

Now navigate to Admin>>Configuration>>Email Configuration and setup the email settings.

For more information refer **page 29** of the Admin OS user guide

Collecting Data

As the first step in the implementation process the following data set needs to be collected.

- Employee Information-

Navigate to PIM>>Configuration>>Data Import to upload the employee information.

For more information refer **page 38** of the Admin OS user guide

- Office locations
- Job Titles
- Departments & Sub Units
- Pay Grades, Employment Status
- Job Categories

The employee information file can be imported into the system, but the other items mentioned above require to be added manually.

Adding Custom Fields

If there are any fields that maybe specific and relevant to the company, you can customize and add new fields to the PIM screen of employees. You are only allowed to create 10 custom fields.

Navigate to PIM>>Configuration>>Custom Fields to create new custom fields.

For more information refer **page 37** of the Admin OS user guide

Mandatory

- **Locations** – Navigate to Admin>>Organization>>Locations. Here you can add all the organizations of your organization.
- **Structure** - Navigate to Admin>>Organization>>Structure. Create the organization structure of your organization.
- **Job Titles** – Navigate to Admin>>Job>>Job Titles. Add all the job titles in your organization.

- **Pay Grades** – Navigate to Admin>>Job>>Pay Grades. Add the different pay grades in your organization.
- **Employment Status** - Navigate to Admin>>Job>>Employment Status. The system has some default employment statuses. You can add update these or add new ones.
- **Job Categories** - Navigate to Admin>>Job>>Job Categories. The system has some default job categories. You can add update these or add new ones.

Non-Mandatory

- Work shifts
- Skills
- Education
- Licenses
- Languages
- Memberships

For more information refer from **page 22 to page 28** of the Admin OS user guide

Updating Information for Employees

Once the mandatory and non-mandatory data are added into the system, you need to update the employee profiles.

Navigate to PIM>>Employee List and click into an employee.

The following information needs to be obtained from each employee to create a complete employee profile that may be used by the company.

The following details are mandatory for every employee as they are used in other modules in the system, while having all employee info captured will enable better reporting.

- **Personal Details**- Employee ID, Employee First name, Employee Last name, Gender & Date of Birth
- **Contact Details**- Work Email
- **Job**- Job Title, Employment Status, Job Category, Joined Date, Sub Unit & Location.
- **Report-to**- Name of Supervisor & Reporting Method.

For more information refer from **page 44 to page 63** of the Admin OS user guide

User Account Creation-

Navigate to Admin>>User Management>>Users to create user accounts for employees to access into the system.

For more information refer **page 11** of the Admin OS user guide

Collecting Leave Data

After setting up the employee data in the system, you are now required to collect the leave data. The following needs to be configured.

- **Leave Period** – Navigate to Leave>>Configuration>>Leave Period. Here you can define the financial leave period of your organization.
- **Leave Types** – Navigate to Leave>>Configuration>>Leave Types. Here you can define the leave types in your organization
- **Work Week** – Navigate to Leave>>Configuration>>Work week. Configure the work week for your organization.
- **Holidays** – Navigate to Leave>>Configuration>>Holidays. Adding all the company holidays for that year.

For more information refer from **page 65 to 68** of the Admin OS user guide

Collecting Leave Entitlements

Navigate to Leave>>Entitlements>>Add Employee Entitlements to update the leave entitlements for all employees.

Depending on the date of your rollout enter the remaining balance as entitlements.

For more information refer from **page 69 to 74** of the Admin OS user guide

Collecting Time Data

After setting up the Leave data in the system, you are now required to collect the Projects information. The following data needs to be gathered in order to maintain timesheets.

- **Customers**- Navigate to Time>>Project Info>>Customers. Here you can add all customer related information.
- **Projects**- Navigate to Time>>Project Info>>Projects. Here you can add all project related information.
- **Activities**- Once the projects are created, navigate to Time>>Project Info>>Projects and then once the projects are created; you can add all activities related to that project.

For more information refer from **page 85 to 87** of the Admin OS user guide

Creating Timesheets

Navigate to Time>>Timesheets>> Employee Timesheets. Create timesheets using the project information collected above.

For more information refer from **page 87 to 89** of the Admin OS user guide

Collecting Recruitment Data

After setting up the Time data in the system, you are now required to create vacancies and add candidates.

Creating Vacancies

Navigate to Recruitment>>Vacancies>>Add. Please note that while creating vacancies, the job titles need to be captured in the system.

For more information refer from **page 111 to 113** of the Admin OS user guide

Collecting Performance Data

After setting up the recruitment data in the system, you are now required to collect the evaluation information.

- **KPI's (Key Performance indicators)** - Navigate to Performance>>Configuration>>KPIs. Here you can add the list of KPI's. Please note that while adding KPI's, the job titles need to be captured in the system.

For more information refer from **page 114 to 116** of the Admin OS user guide

Creating Reviews

Navigate to Performance>>Manage Reviews>>Review List. Create reviews using the KPI's collected above.

For more information refer from **page 118 to 121** of the Admin OS user guide

System Rollout

The system can be rolled out in phases as and when you have different modules setup and ready to go. For your initial rollout, we advise you setup your admin and PIM module as the first phase. Then you can create the user account and communicate them to employees via email.

Other modules can be put into production as and when you have them ready.

-The END-

For more information please contact training@orangehrm.com.