

OrangeHRM – My Info Module

Project Functional Requirement Specification

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1. Purpose of the document:

This is **not** a project plan. It is a guide for system architecture and development, not for phasing, timelines or deliverables.

This document is divided into two sections:

- Project Overview
- Information Architecture

2. Project Overview:

2.1 Audience:

This document is intended as a complete guide for ESS-User in 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.

2.2 Hardware and Hosting:

OrangeHRM's servers will be hosted at X company's site.
OrangeHRM will be hosted on two servers: one to host the actual website and (language)code, and the other to host the (database name)database.

3. Information Architecture

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



3.1 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.

3.1.1 My Info Module

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.

Figure 1.1

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

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.

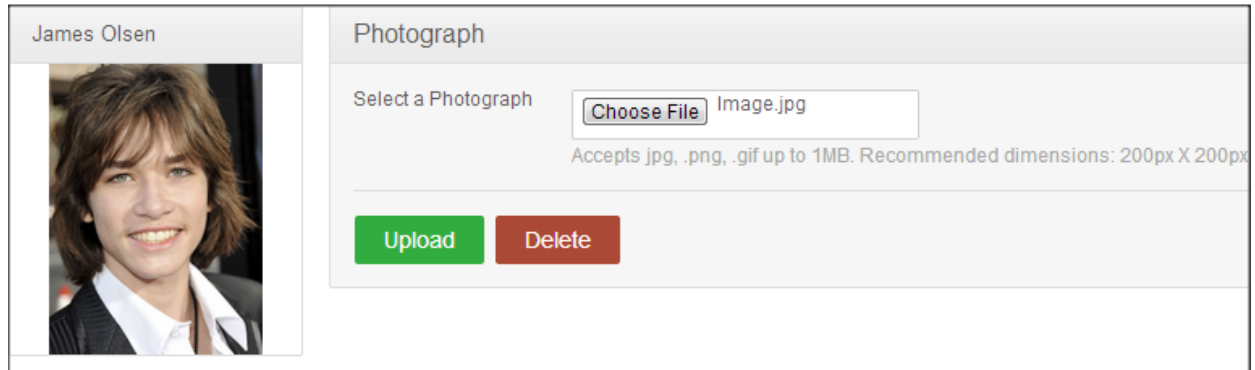
Personal Details

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

3.1.2 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



The screenshot shows a user profile for 'James Olsen'. On the left is a placeholder for a profile picture. On the right, under the heading 'Photograph', there is a section for uploading a photo. It includes a 'Select a Photograph' label, a 'Choose File' button, and a text box containing 'Image.jpg'. Below this, a note states: 'Accepts jpg, .png, .gif up to 1MB. Recommended dimensions: 200px X 200px'. At the bottom of the upload section are two buttons: a green 'Upload' button and a red 'Delete' button.

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.

3.1.3 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	
Address Street 1	<input type="text" value="68th 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="54312"/>
Country	<input type="text" value="United States"/> ▼
<hr/>	
Home Telephone	<input type="text"/>
Mobile	<input type="text" value="+16543287434"/>
Work Telephone	<input type="text"/>
<hr/>	
Work Email	<input type="text" value="jolsen@uspo.com"/>
Other Email	<input type="text" value="jolsen95@gmail.com"/>
<hr/>	
<input type="button" value="Save"/>	

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

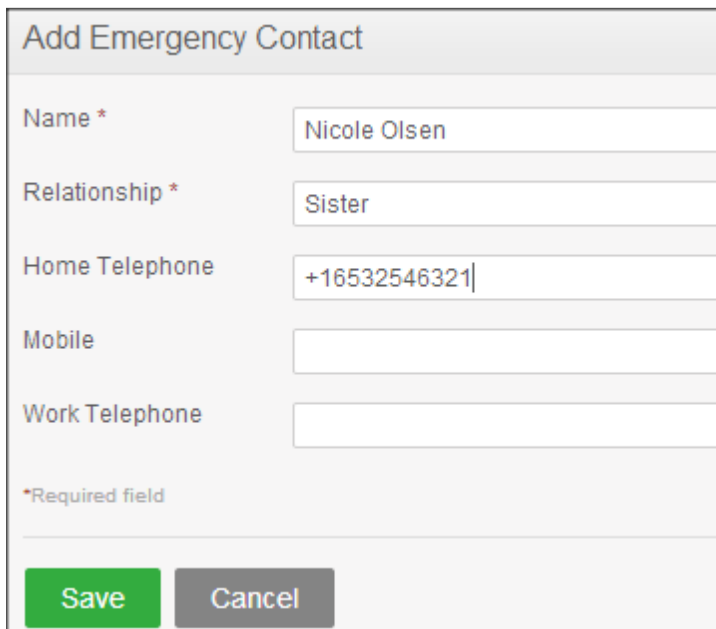
- Mobile
- Work Telephone
- Work Email
- Other Email

Once you have completed this form click “Save”.

3.1.4 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.

Figure 1.4



The screenshot shows a web form titled "Add Emergency Contact". It contains several input fields: "Name *" with the value "Nicole Olsen", "Relationship *" with the value "Sister", "Home Telephone" with the value "+16532546321", "Mobile", and "Work Telephone". A legend indicates that an asterisk (*) denotes a required field. At the bottom of the form are two buttons: a green "Save" button and a grey "Cancel" button.

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**.

Figure 1.5

Assigned Emergency Contacts					
<div><button>Add</button> <button>Delete</button></div>					
<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

You may add multiple entries of emergency contacts.

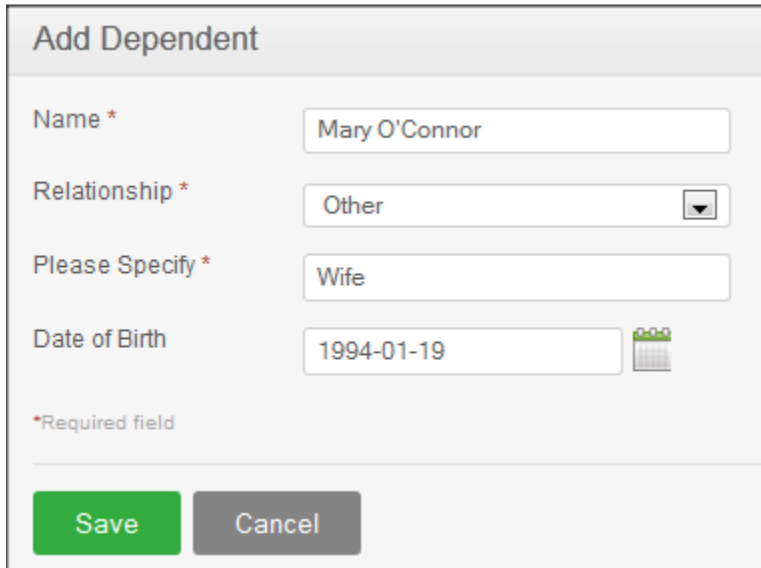
To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

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”.

3.1.5 Dependants

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.

Figure 1.6

A form titled "Add Dependent" with four input fields. The first field is "Name *" with the value "Mary O'Connor". The second field is "Relationship *" with a dropdown menu showing "Other". The third field is "Please Specify *" with the value "Wife". The fourth field is "Date of Birth" with the value "1994-01-19" and a calendar icon. Below the fields is a legend for "*Required field". At the bottom are two buttons: "Save" (green) and "Cancel" (gray).

Add Dependent

Name *

Relationship *

Please Specify *


Date of Birth

*Required field

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**.

Figure 1.7

A table titled "Assigned Dependents" with a header row and one data row. The header row has columns for "Name", "Relationship", and "Date of Birth". The data row has the values "Mary O'Connor", "Wife", and "1994-01-19". Above the table are two buttons: "Add" (green) and "Delete" (red). Below the table is a section titled "Attachments" with an "Add" button (green).

Assigned Dependents

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

Attachments

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”.

3.1.6 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.

Figure 1.8

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

- Document ***: Radio buttons for "Passport" (selected) and "Visa".
- Number ***: Text input field containing "A5745675673".
- Issued Date**: Text input field containing "1997-04-01" with a calendar icon to its right.
- Expiry Date**: Text input field containing "2020-04-01" with a calendar icon to its right.
- Eligible Status**: Empty text input field.
- Issued By**: Dropdown menu showing "United States" with a downward arrow.
- Eligible Review Date**: Text input field containing "yyyy-mm-dd" with a calendar icon to its right.
- Comments**: Large empty text area with a small icon in the bottom right corner.
- Legend**: A red asterisk followed by the text "Required field".
- Buttons**: "Save" (green) and "Cancel" (grey) buttons at the bottom.

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**.

Figure 1.9

Assigned Immigration Records					
<div><div>Add</div><div>Delete</div></div>					
<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					
<div><div>Add</div></div>					

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”.

3.1.7 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

Figure 2.0

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	

3.1.8 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

Figure 2.1

Figure 21.1

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

3.1.9 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

Figure 2.2



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

3.1.10 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.

Figure 2.3

Add Work Experience	
Company *	<input type="text" value="Citibank"/>
Job Title *	<input type="text" value="IT Manager"/>
From	<input type="text" value="2002-04-04"/> 
To	<input type="text" value="2010-04-16"/> 
Comment	<div></div>
* Required field	
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>

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

Figure 2.4

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

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”.

- Education

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.

Figure 2.5

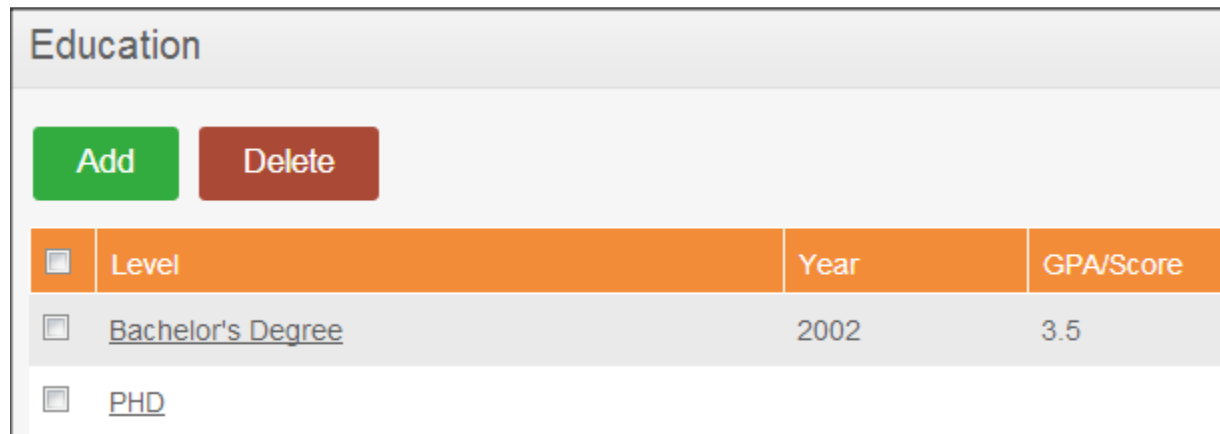
Add Education

Level *	<input type="text" value="Bachelor's Degree"/>	
Institute	<input type="text" value="Michigan Institute of Technology"/>	
Major/Specialization	<input type="text" value="IT Forensics"/>	
Year	<input type="text" value="2002"/>	
GPA/Score	<input type="text" value="3.5"/>	
Start Date	<input type="text" value="1998-04-01"/>	
End Date	<input type="text" value="2002-04-27"/>	

* Required field

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

Figure 2.6



The 'Education' interface features a title bar, two action buttons ('Add' and 'Delete'), and a table with three columns: 'Level', 'Year', and 'GPA/Score'. The table contains two entries: 'Bachelor's Degree' (2002, 3.5) and 'PHD'.

	Level	Year	GPA/Score
<input type="checkbox"/>	Bachelor's Degree	2002	3.5
<input type="checkbox"/>	PHD		

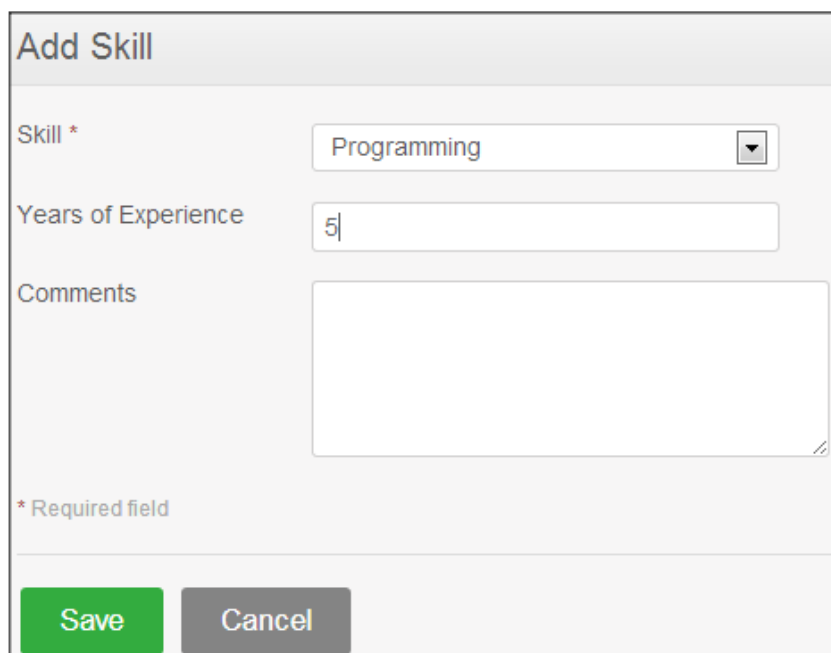
You may enter multiple entries of education.

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 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.

Figure 2.7



The 'Add Skill' form includes a title bar, a 'Skill *' dropdown menu (set to 'Programming'), a 'Years of Experience' text input (containing '5'), and a 'Comments' text area. A legend indicates that '*' denotes a required field. At the bottom are 'Save' and 'Cancel' buttons.

Skill *

Years of Experience

Comments

* Required field

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

Figure 2.8

The screenshot shows a web interface titled "Skills". Below the title are two buttons: a green "Add" button and a red "Delete" button. Below these buttons is a table with two columns: "Skill" and "Years of Experience". The table contains one row with the skill "Programming" and 5 years of experience. There is a small square checkbox to the left of the skill name.

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

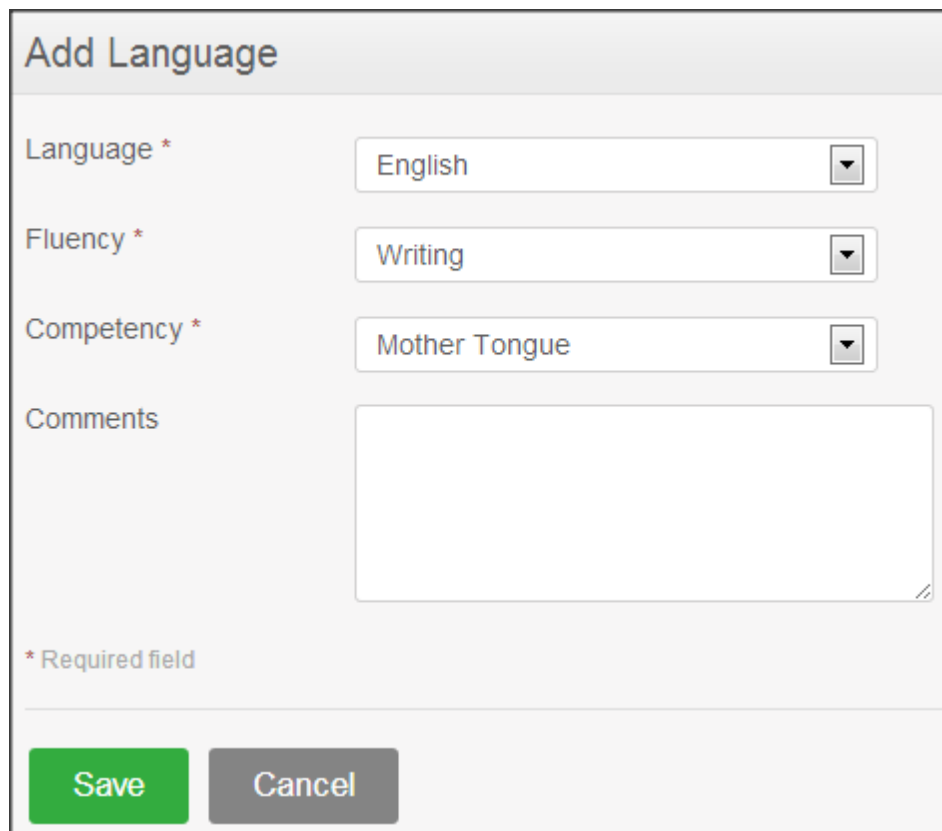
You may enter multiple entries of skills.

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 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.

Figure 2.9



The 'Add Language' form contains four fields: 'Language *' with a dropdown menu showing 'English', 'Fluency *' with a dropdown menu showing 'Writing', 'Competency *' with a dropdown menu showing 'Mother Tongue', and 'Comments' with a large text area. A legend indicates that fields with an asterisk are required. At the bottom are 'Save' and 'Cancel' buttons.

Add Language

Language * English

Fluency * Writing

Competency * Mother Tongue

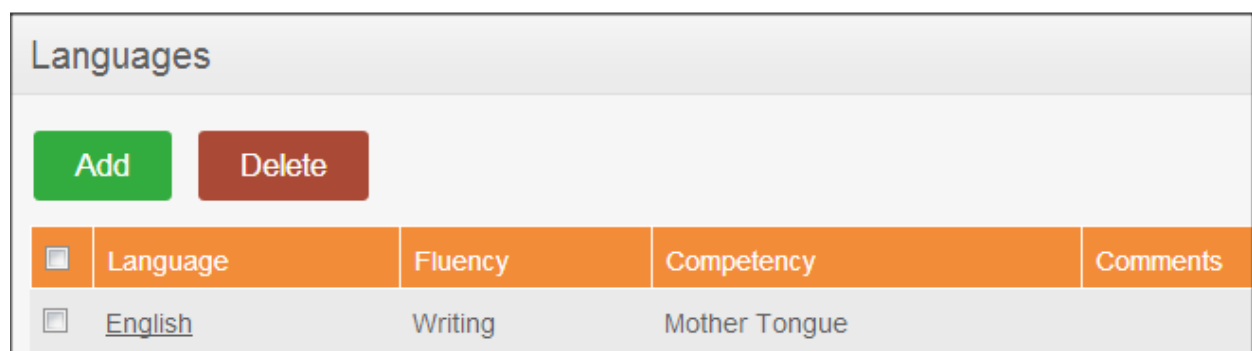
Comments

* Required field

Save Cancel

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

Figure 3.0



The 'Languages' section features 'Add' and 'Delete' buttons above a table. The table has five columns: 'Language', 'Fluency', 'Competency', and 'Comments'. The first row shows 'English' as the language, 'Writing' as the fluency, and 'Mother Tongue' as the competency.

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

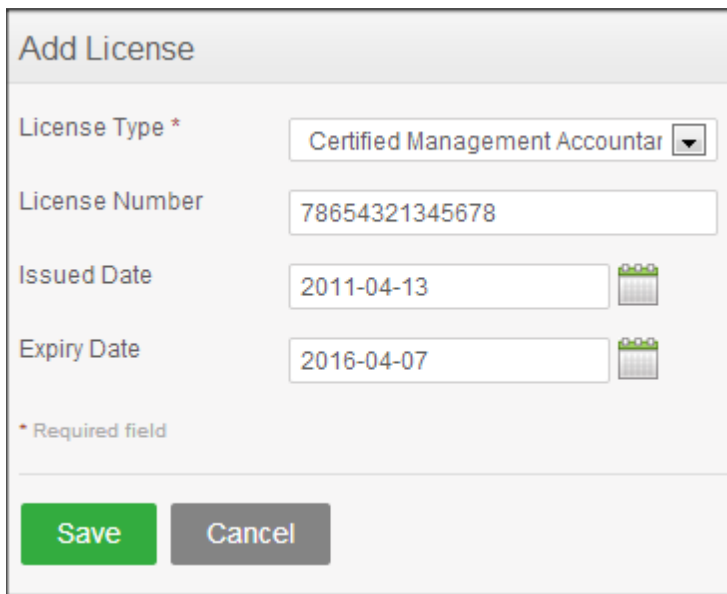
You may enter multiple entries of languages.

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

Figure 3.1



The screenshot shows a web form titled "Add License". It contains four input fields: "License Type *" with a dropdown menu showing "Certified Management Accountant", "License Number" with the text "78654321345678", "Issued Date" with the date "2011-04-13", and "Expiry Date" with the date "2016-04-07". Each date field has a small calendar icon to its right. Below the fields is a legend indicating that the asterisk (*) denotes a "Required field". At the bottom of the form are two buttons: a green "Save" button and a gray "Cancel" button.

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

Figure 3.2

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)	2011-04-13	2016-04-07
<input type="checkbox"/>	Oracle Certified Professional Java SE Programmer	2013-04-10	2019-04-25

You may enter multiple entries of licenses.

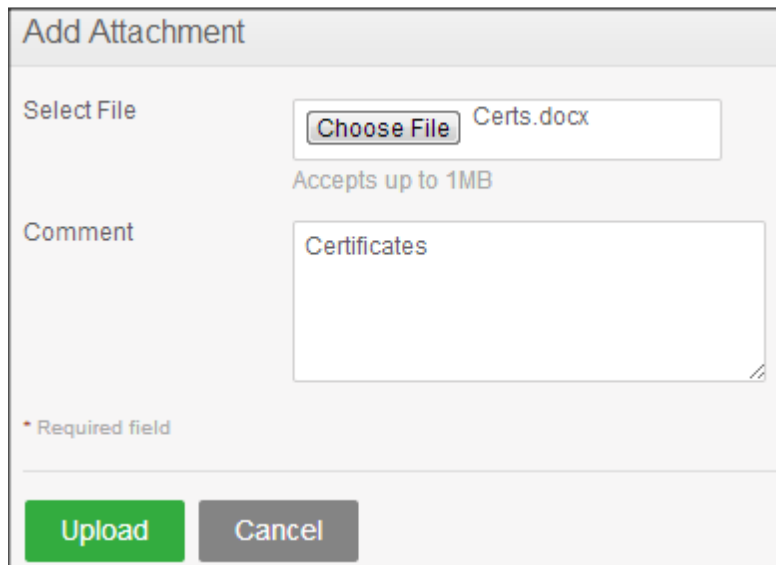
To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

- Attachments

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.

Figure 3.3



The 'Add Attachment' form 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 the word 'Certificates'. A red asterisk and the text '* Required field' are located below the comment area. At the bottom are 'Upload' and 'Cancel' buttons.

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

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

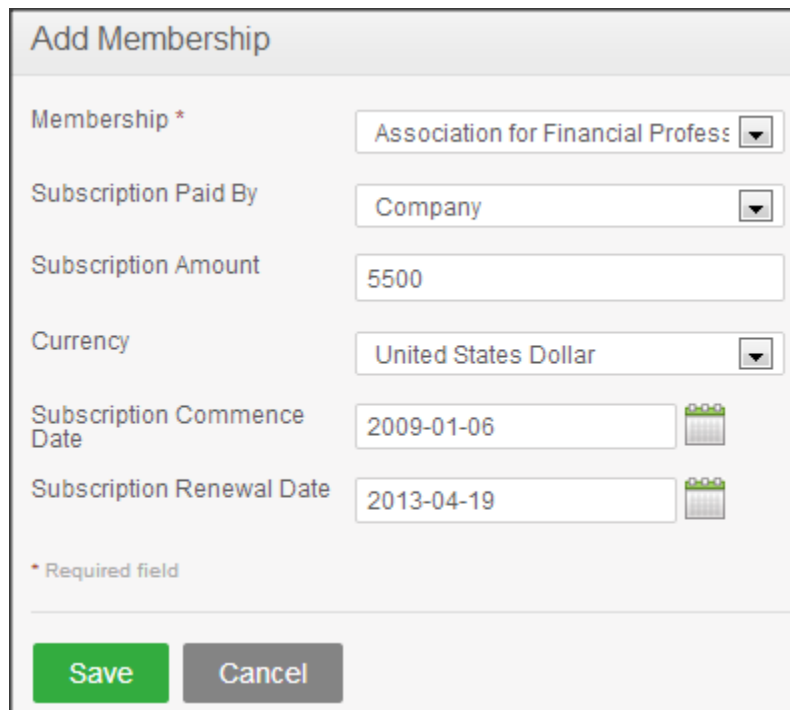
You may upload multiple attachments.

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

3.1.11 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.

Figure 3.5



The 'Add Membership' form contains the following fields:

- Membership ***: Association for Financial Profes (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)

* Required field

Buttons: Save, Cancel

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

Figure 3.6

Assigned Memberships						
<div>Add Delete</div>						
<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

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. Sign-Off Document

The following parties have read and agree with this Requirements Definition document for the OrangeHRM application account module functionality.

After approval of this Requirements Definition phase, any significant changes in the scope of this project will require validation of existing project costs and schedules.

Name

Business Lead

Date

Name

Project Manager

Date