



[PF-3] Job and Organization functionality

Created: 18/Apr/23 1:40 PM - Updated: 22/Jun/23 2:03 PM - Resolved: 22/Jun/23 2:03 PM

| | |
|-----------------------|---------------|
| Status: | Done |
| Project: | Project final |
| Component/s: | None |
| Fix Version/s: | 1.0 |

| | | | |
|----------------------------|---------------|------------------|------------|
| Type: | Epic | Priority: | Medium |
| Reporter: | Sabina Gabor | Assignee: | Unassigned |
| Resolution: | Done | Votes: | 0 |
| Labels: | None | | |
| Original Estimate: | Not Specified | | |
| Remaining Estimate: | Not Specified | | |
| Time Spent: | Not Specified | | |

Agile

Epic Name: Admin Module

Description

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.

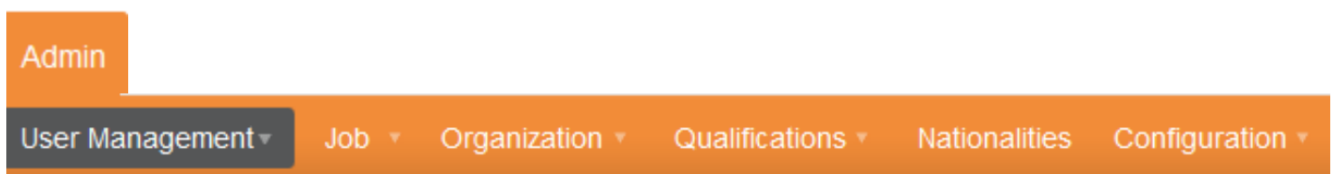


Figure 1.1: Admin Module

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.

Job

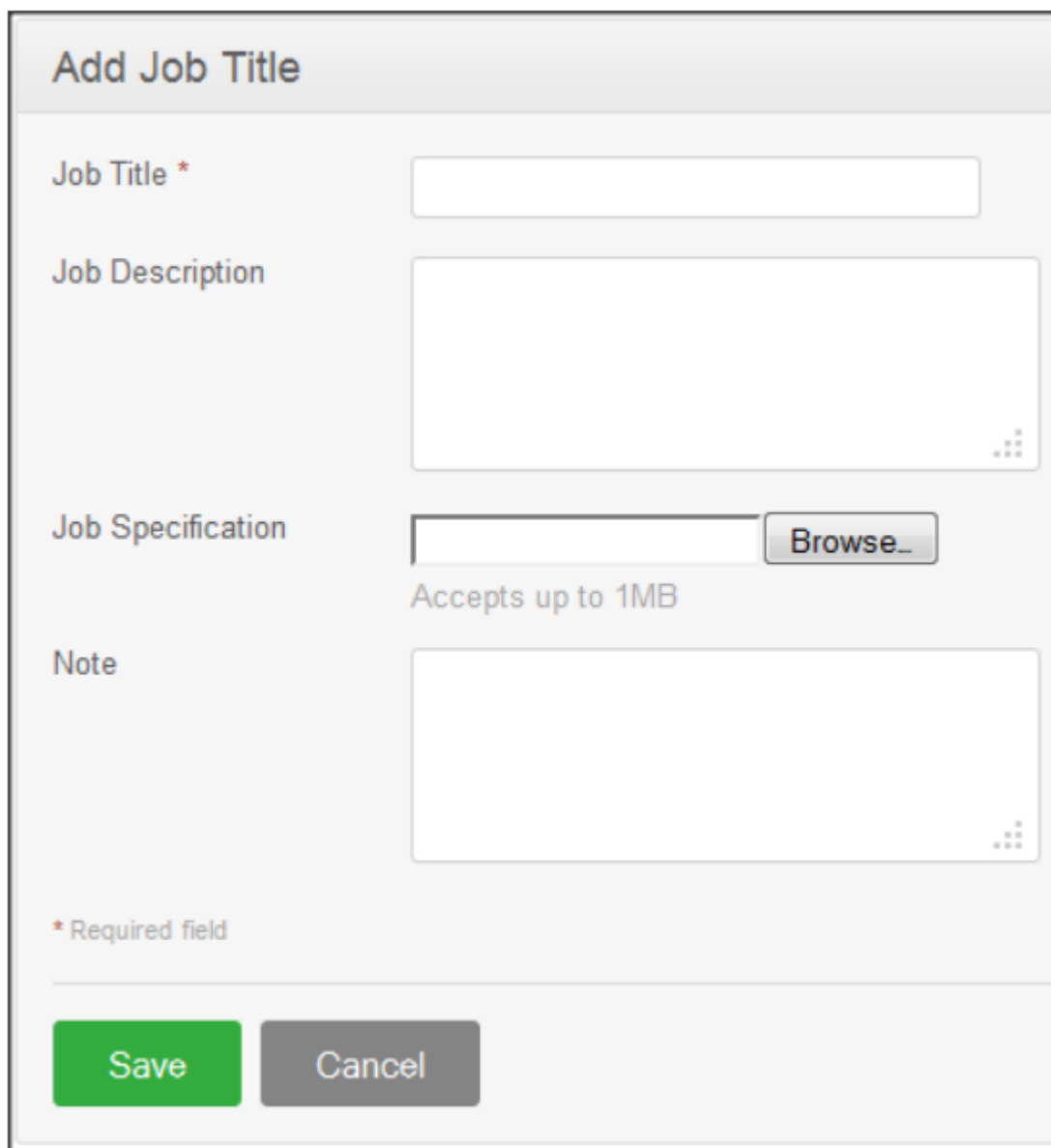
All job related information can be defined in this feature. The sub menu consists of the following items:

- 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.



Add Job Title

Job Title *

Job Description

Job Specification

Accepts up to 1MB

Note

* Required field

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 | |
|---|---|
| <div> <div>Add</div> <div>Delete</div> </div> | |
| <input type="checkbox"/> Job Title | Job Description |
| <input type="checkbox"/> Accountant | |
| <input type="checkbox"/> Audit Trainee | |
| <input type="checkbox"/> Chief 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.

Add Pay Grade

Name *

* Required field

Save

Cancel

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.

Edit Pay Grade

Name *

* Required field

Add Currency

Currency *

Minimum Salary

Maximum Salary

* Required field

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 *

Level 1

* Required field

Edit

Cancel

Assigned Currencies

Add

Delete

| <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

Add

Delete

| <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 |

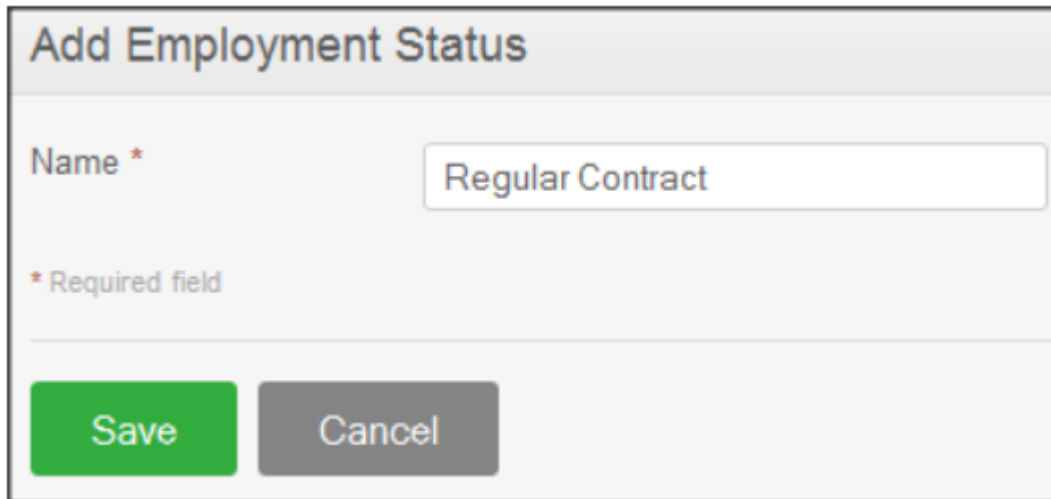
Figure 1.9: Pay Grades List

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.



The image shows a web form titled "Add Employment Status". It has a light gray header bar with the title. Below the header, there is a label "Name *" in a dark gray font. To the right of the label is a text input field containing the text "Regular Contract". Below the input field, there is a small red asterisk followed by the text "Required field". At the bottom of the form, there are two buttons: a green "Save" button and a gray "Cancel" button.

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.

| Employment Status | |
|--------------------------|--------------------------------------|
| <input type="checkbox"/> | Employment Status |
| <input type="checkbox"/> | Freelance |
| <input type="checkbox"/> | Full time Contract |
| <input type="checkbox"/> | Full-Time Permerment |
| <input type="checkbox"/> | Full-Time Probation |
| <input type="checkbox"/> | Part-Time Contract |
| <input type="checkbox"/> | Part-Time Internship |

Figure 2.1: Employment Status List

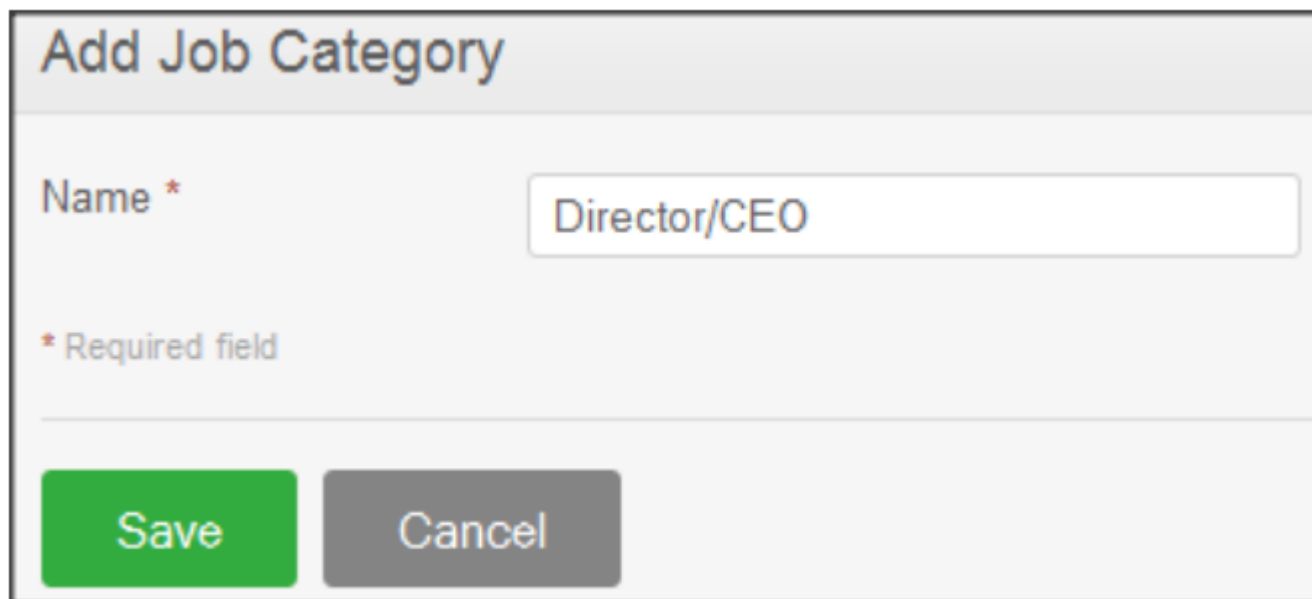
To delete an Employment Status click on the check box next to the “Employment Status” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

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.



Add Job Category

Name *

* Required field

Save **Cancel**

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.

The screenshot shows a web interface for managing job categories. At the top, there's a header 'Job Categories'. Below it are two buttons: a green 'Add' button and a red 'Delete' button. Underneath these buttons is a list of job categories, each with a checkbox on the left and the category name on the right. The categories listed are: 'Job Category' (highlighted in orange), 'Craft Workers', 'Director / CEO', 'Laborers and Helpers', 'Office and Clerical Workers', and 'Officials and Managers'.

| <input type="checkbox"/> | Job Category |
|--------------------------|------------------------------------|
| <input type="checkbox"/> | <u>Craft Workers</u> |
| <input type="checkbox"/> | <u>Director / CEO</u> |
| <input type="checkbox"/> | <u>Laborers and Helpers</u> |
| <input type="checkbox"/> | <u>Office and Clerical Workers</u> |
| <input type="checkbox"/> | <u>Officials and Managers</u> |

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.

Add Work Shift

Shift Name *

Hours Per Day *

Available Employees

- Peter Anderson
- Jennifer Brown
- Russel Hamilton
- Kevin Mathews
- Anthony Nolan
- Ryan Parker
- Harshani Silva
- Nick Silverstone

Assigned Employees

- Mark Boucher

Add >>
Remove <<

* Required field

Save Cancel

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.

| Work Shifts | | |
|--------------------------|----------------|---------------|
| <div>Add Delete</div> | | |
| <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”.

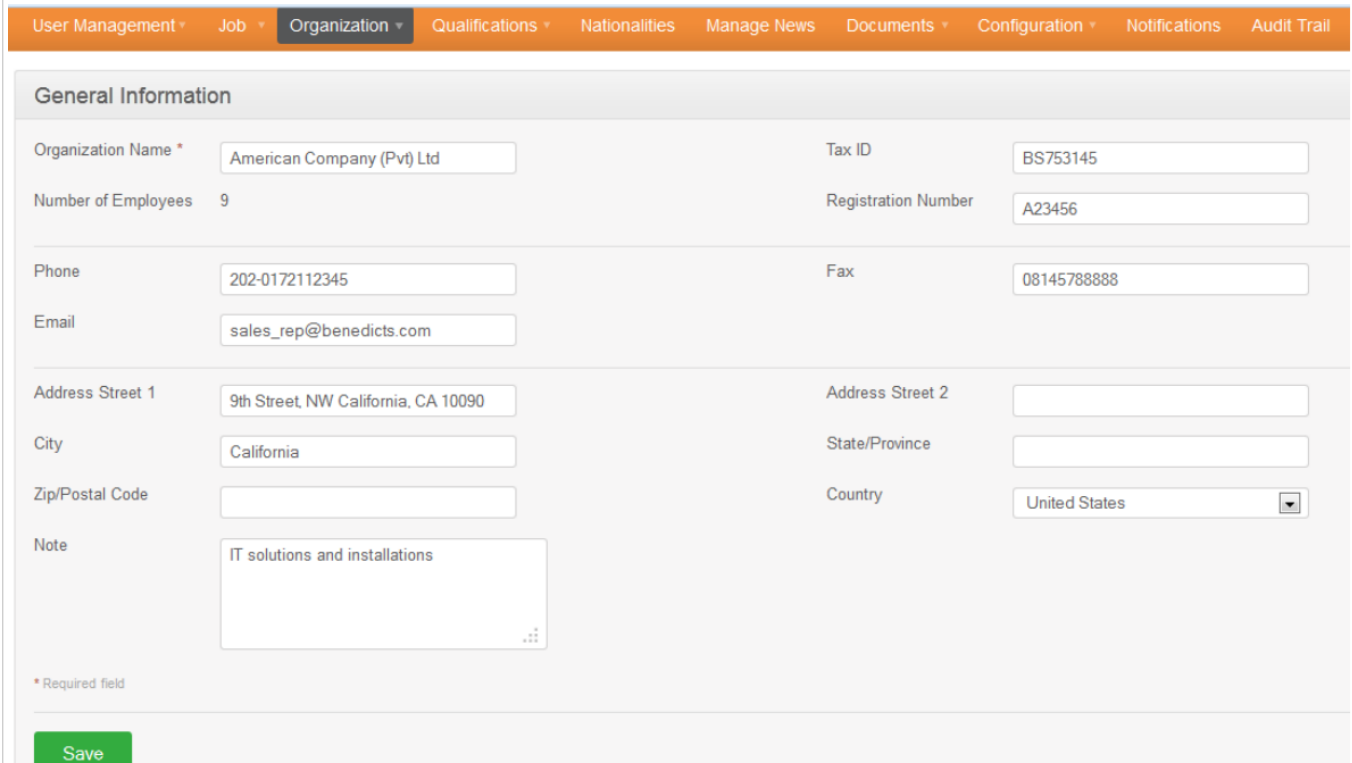
Organization

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.



The screenshot shows a web application interface with a top navigation bar containing links: User Management, Job, Organization (selected), Qualifications, Nationalities, Manage News, Documents, Configuration, Notifications, and Audit Trail. Below the navigation bar is the 'General Information' form. The form has the following fields and values:

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

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

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.

The form contains the following fields:

- Name * (text input)
- Country * (dropdown menu with "-- Select --" and a downward arrow)
- State/Province (text input)
- City (text input)
- Address (text input)
- Zip/Postal Code (text input)
- Phone (text input)
- Fax (text input)
- Notes (text input)

* Required field

Buttons: Save, Cancel

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".

| Add | | Delete | | | |
|--------------------------|--------|------------|----------------|--------------|---------------------|
| | 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.

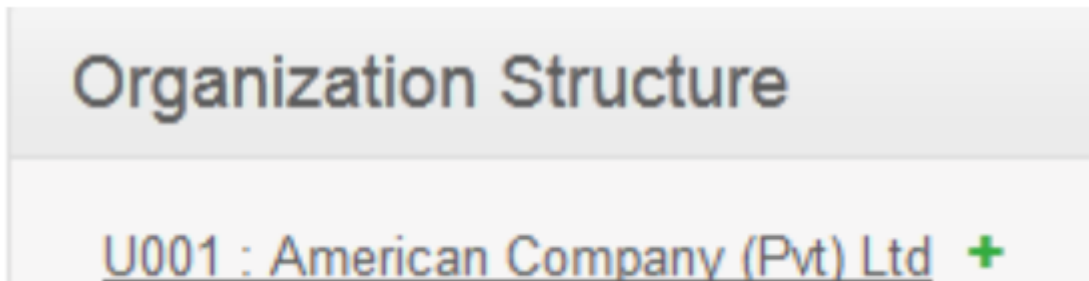
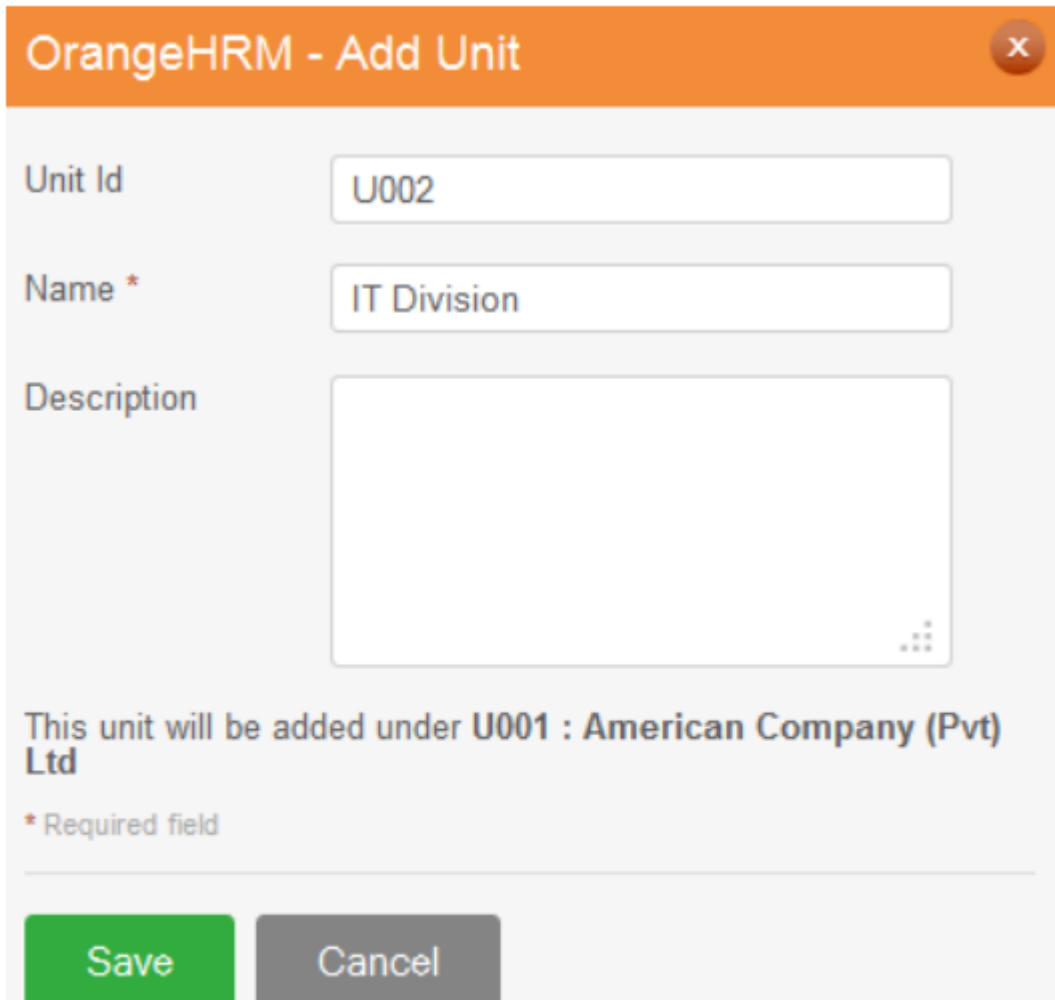


Figure 2.9: Add Sub-Unit



The image shows a web form titled "OrangeHRM - Add Unit" with an orange header bar containing a close button (X). The form has three input fields: "Unit Id" with the value "U002", "Name *" with the value "IT Division", and a large empty "Description" text area. Below the fields, a message states "This unit will be added under U001 : American Company (Pvt) Ltd". A legend indicates that the asterisk (*) denotes a "Required field". At the bottom, there are two buttons: a green "Save" button and a grey "Cancel" button.

OrangeHRM - Add Unit

Unit Id

Name *

Description

This unit will be added under U001 : American Company (Pvt) Ltd

* 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.

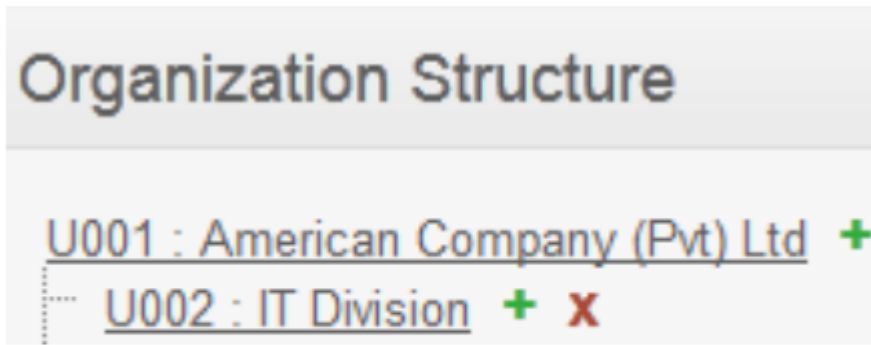




Figure 3.1: Sub-Unit Structure

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.

Attachments



Figure 1.1: Admin Module

Fig. 1.1.png (42 kB)

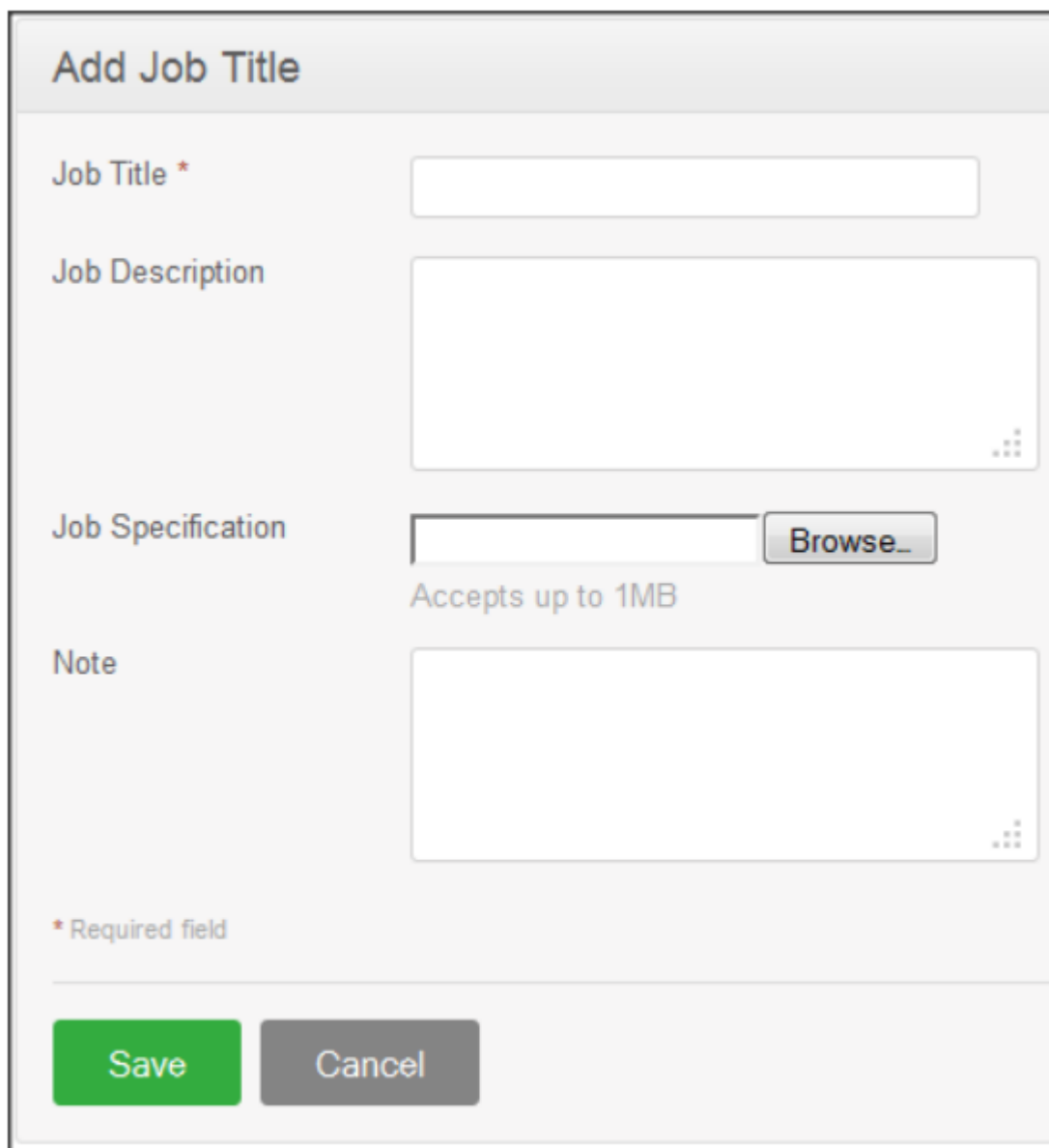
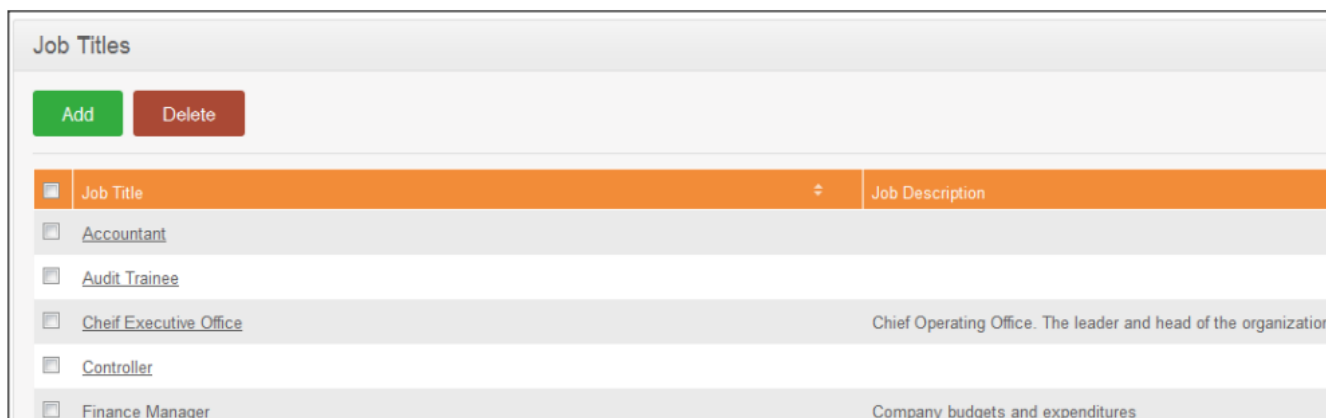
The image displays a form titled "Add Job Title". It contains four main input fields: "Job Title *" (a single-line text box), "Job Description" (a multi-line text area), "Job Specification" (a single-line text box with a "Browse..." button next to it), and "Note" (a multi-line text area). Below the "Job Specification" field, there is a note that says "Accepts up to 1MB". At the bottom of the form, there is a legend indicating that the asterisk (*) denotes a "Required field". Finally, there are two buttons at the very bottom: a green "Save" button and a grey "Cancel" button.

Figure 1.4: Add Job Title

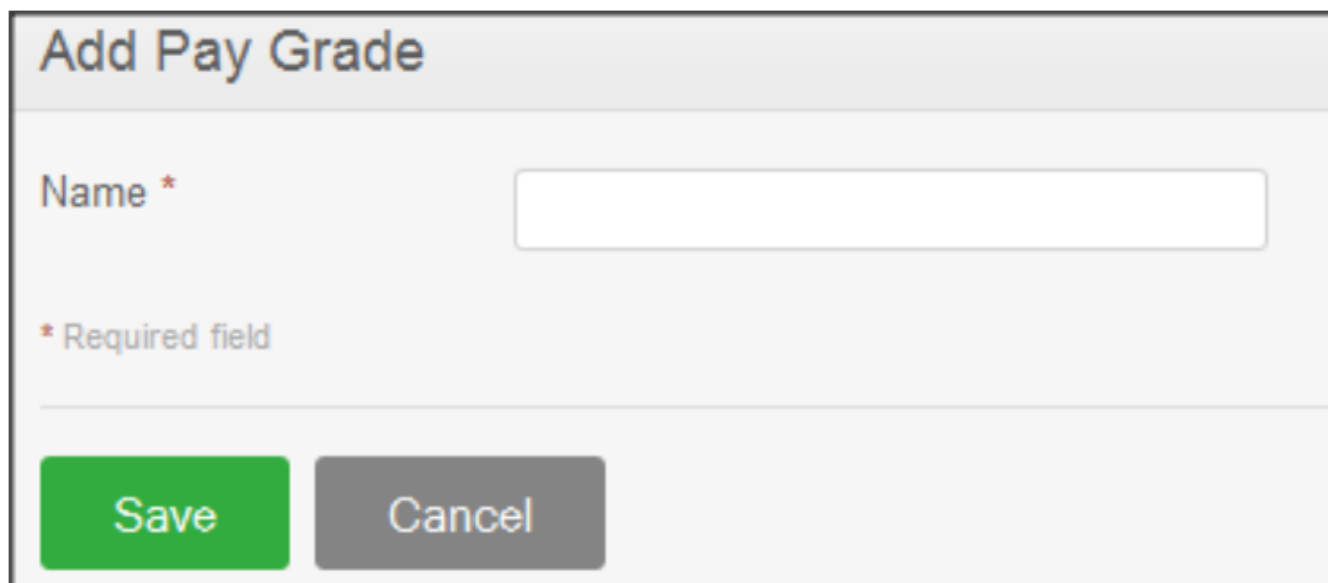
Fig. 1.4.png (37 kB)



| Job Titles | |
|---|---|
| <div>Add Delete</div> | |
| <input type="checkbox"/> Job Title | Job Description |
| <input type="checkbox"/> Accountant | |
| <input type="checkbox"/> Audit Trainee | |
| <input type="checkbox"/> Chief 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

Fig. 1.5.png (36 kB)



Add Pay Grade

Name *

* Required field

Save Cancel

Figure 1.6: Add Pay Grade

Fig. 1.6.png (29 kB)

Edit Pay Grade

Name *

* Required field

Add Currency

Currency *

Minimum Salary

Maximum Salary

* Required field

Figure 1.7: Assign Pay Grade

Fig. 1.7.png (41 kB)

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

Fig. 1.8.png (37 kB)

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

Fig. 1.9.png (29 kB)

Add Employment Status

Name *

* Required field

Figure 2.0: Add Employment Status

Fig. 2.0.png (28 kB)

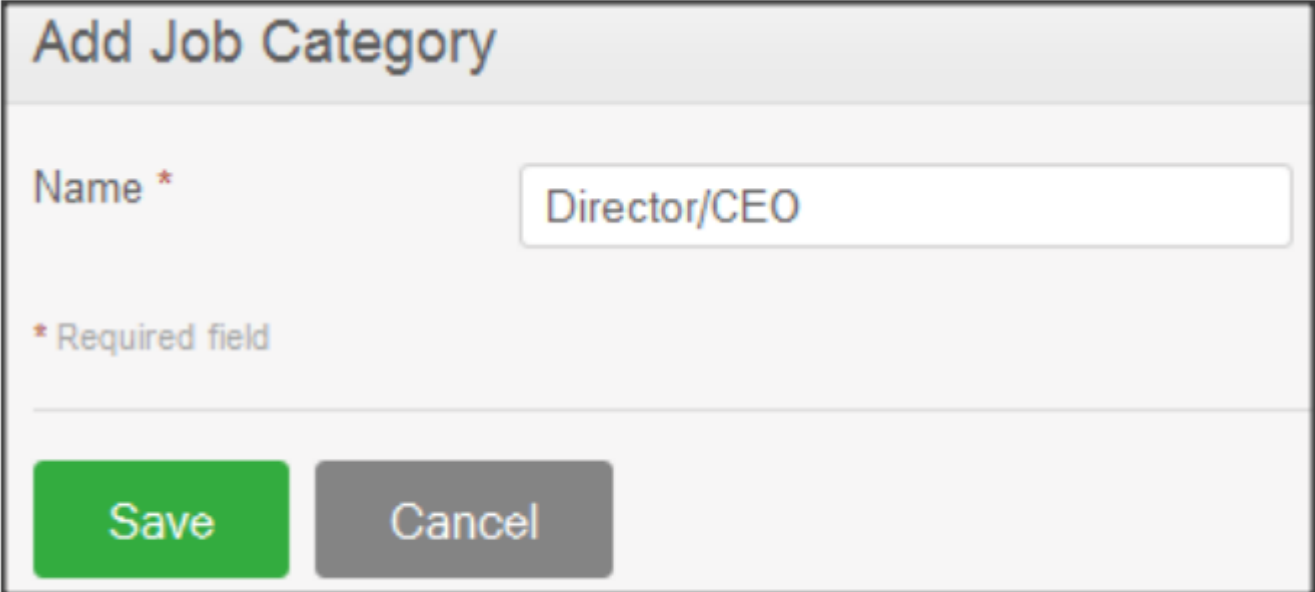
Employment Status

AddDelete

| | |
|--------------------------|-----------------------------|
| <input type="checkbox"/> | Employment Status |
| <input type="checkbox"/> | <u>Freelance</u> |
| <input type="checkbox"/> | <u>Full time Contract</u> |
| <input type="checkbox"/> | <u>Full-Time Permernent</u> |
| <input type="checkbox"/> | <u>Full-Time Probation</u> |
| <input type="checkbox"/> | <u>Part-Time Contract</u> |
| <input type="checkbox"/> | <u>Part-Time Internship</u> |

Figure 2.1: Employment Status List

Fig. 2.1.png (47 kB)



Add Job Category

Name *

* Required field

Save **Cancel**

Figure 2.2: Add Job Category

Fig. 2.2.png (35 kB)

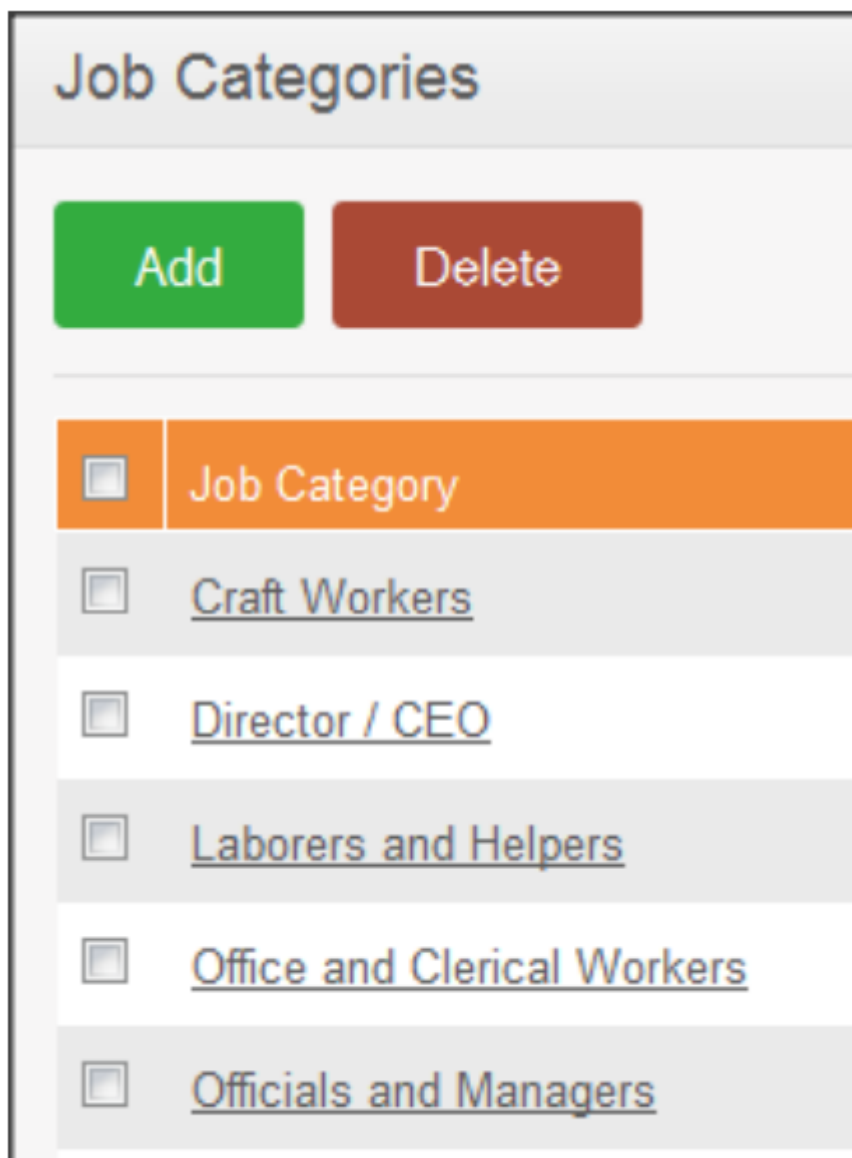


Figure 2.3: Job Category List

Fig. 2.3.png (66 kB)

Add Work Shift

Shift Name *

Day Shift

Hours Per Day *

9

Available Employees

Peter Anderson

Jennifer Brown

Russel Hamilton

Kevin Mathews

Anthony Nolan

Ryan Parker

Harshani Silva

Nick Silverstone

Assigned Employees

Mark Boucher

Add >>

Remove <<

* Required field

Save

Cancel

Figure 2.4: Add Work Shift

Fig. 2.4.png (78 kB)

| Work Shifts | | |
|--------------------------|----------------|---------------|
| <div>AddDelete</div> | | |
| <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

Fig. 2.5.png (33 kB)

User Management ▾Job ▾Organization ▾Qualifications ▾NationalitiesManage NewsDocuments ▾Configuration ▾NotificationsAudit Trail

General Information

Organization Name *

American Company (Pvt) Ltd

Tax ID

BS753145

Number of Employees

9

Registration Number

A23456

Phone

202-0172112345

Fax

08145788888

Email

sales_rep@benedicts.com

Address Street 1

9th Street, NW California, CA 10090

Address Street 2

City

California

State/Province

Zip/Postal Code

Country

United States ▾

Note

IT solutions and installations

* Required field

Save

Figure 2.6: General Information

Fig. 2.6.png (99 kB)

Name *

Country *

-- Select--

State/Province

City

Address

Zip/Postal Code

Phone

Fax

Notes

* Required field

Save

Cancel

Figure 2.7: Add Location

Fig. 2.7.png (25 kB)

AddDelete

| | 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

Fig. 2.8.png (24 kB)



Figure 2.9: Add Sub-Unit

Fig. 2.9.png (36 kB)

OrangeHRM - Add Unit

Unit Id

U002

Name *

IT Division

Description

This unit will be added under U001 : American Company (Pvt) Ltd

* Required field

Save

Cancel

Figure 3.0: Sub-Unit Details

Fig. 3.0.png (45 kB)

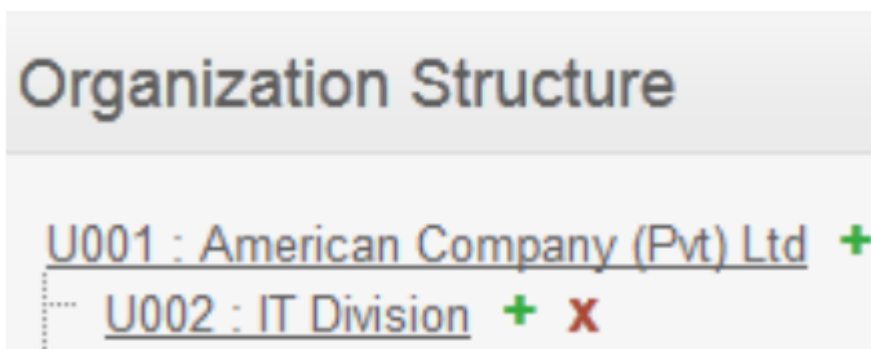


Figure 3.1: Sub-Unit Structure

Fig. 3.1.png (39 kB)



Figure 3.2: Company Structure Hierarchy

Fig. 3.2.png (80 kB)

| Links | | | |
|------------|-----------------------|--|------|
| Relates | | | |
| relates to | PF-4 | Verify Job functionality | Done |
| relates to | PF-5 | The items in the Job submenu are present | Done |
| relates to | PF-41 | Verify Organization functionality | Done |
| relates to | PF-69 | The "Available Employees" field on the Add Work Shift page isn't present | Done |