[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:	Proiect 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.
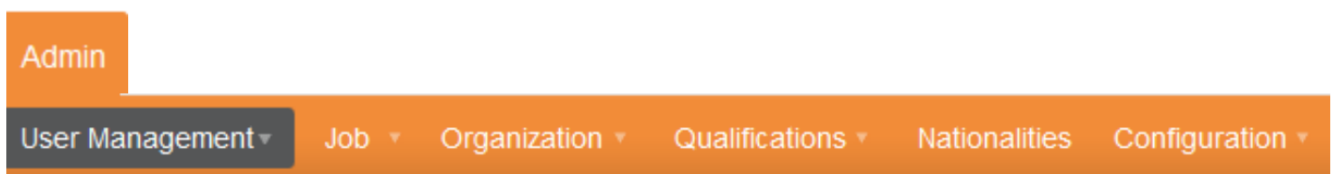

Figure 1.1: Admin Module

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.
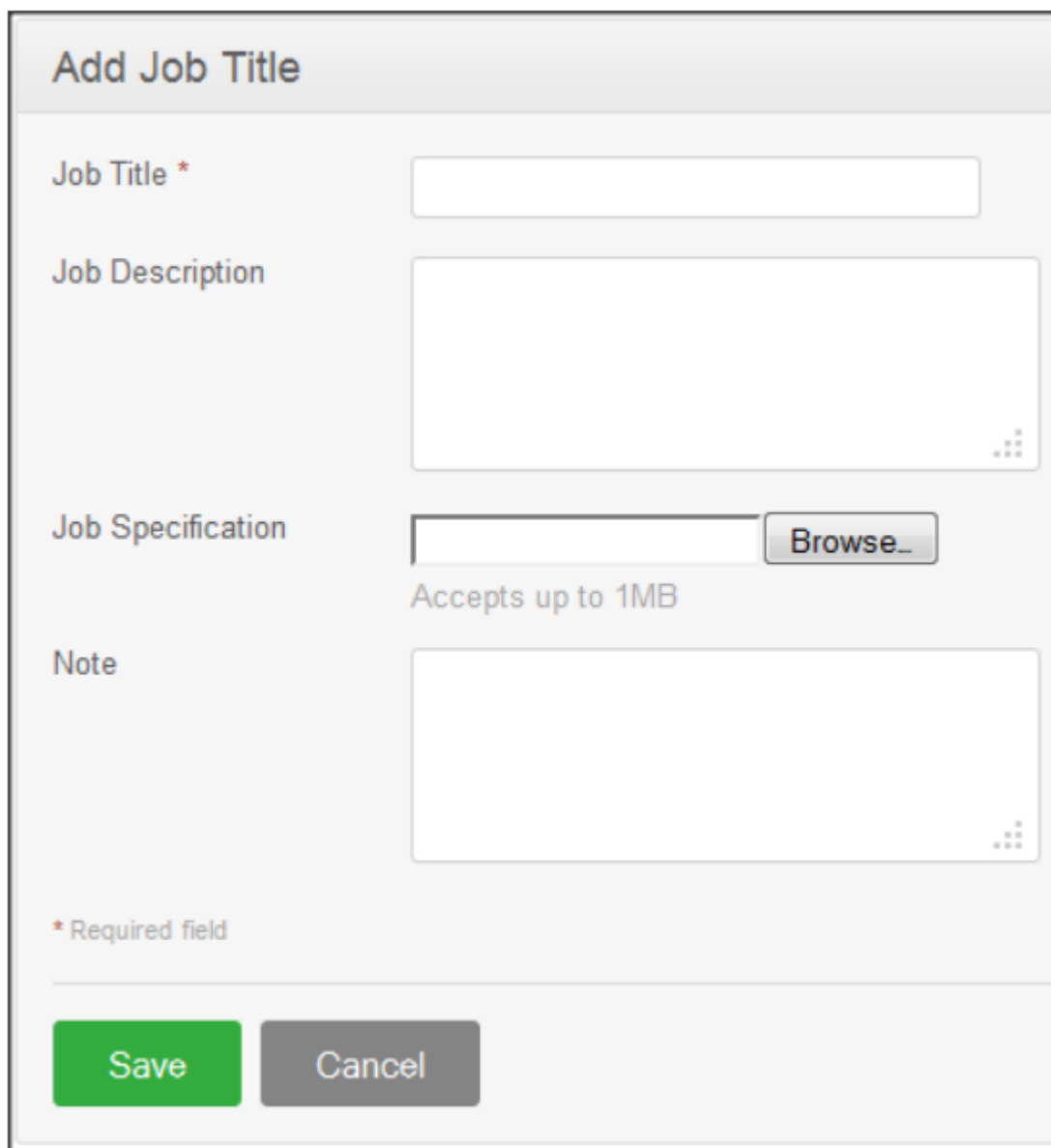
<u>**Job**</u>

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	Browse_
	Accepts up to 1MB
Note	

* Required field

Save   Cancel

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

	Job Title	⇕	Job Description
☐	Accountant		
☐	Audit Trainee		
☐	Cheif Executive Office		Chief Operating Office. The leader and head of the organization
☐	Controller		
☐	Finance Manager		Company budgets and expenditures

Add   **Delete**

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 *

Level 3

* Required field

Edit **Cancel**

Add Currency

Currency *

USD - United States Dollar

Minimum Salary

40000

Maximum Salary

50000

* Required field

Save **Cancel**

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.

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.
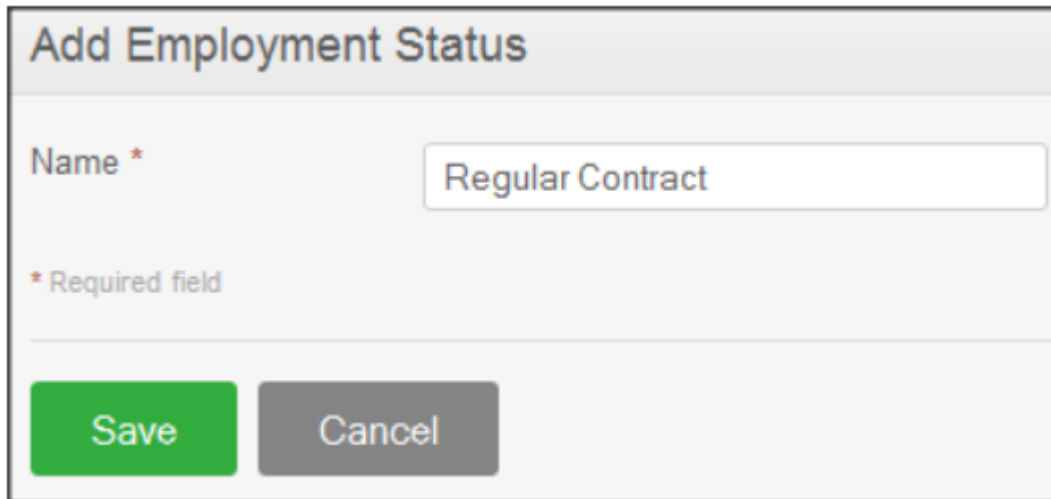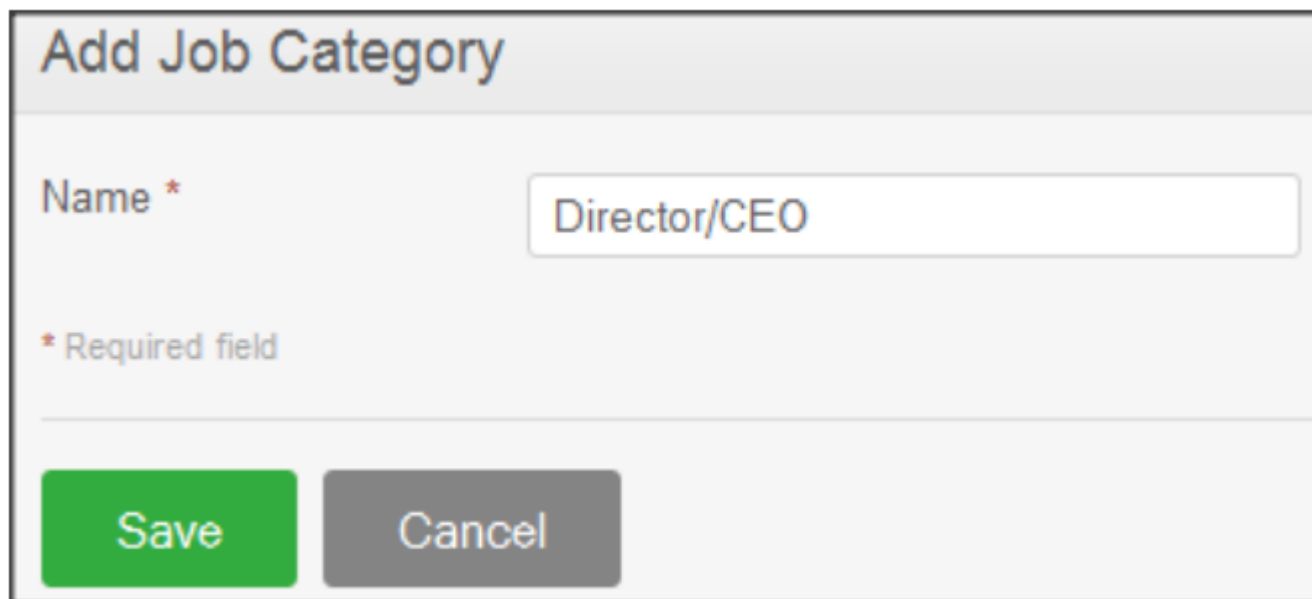

Figure 1.9: Pay Grades List

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.

Add Employment Status

Name *   Regular Contract

* Required field

Save   Cancel

Figure 2.0: Add Employment Status

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

Figure 2.1: Employment Status List

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

Job Categories

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

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

Click "Save" once the field is added.

Add Job Category

Name *

Director/CEO

* 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.

Figure 2.3: Job Category List

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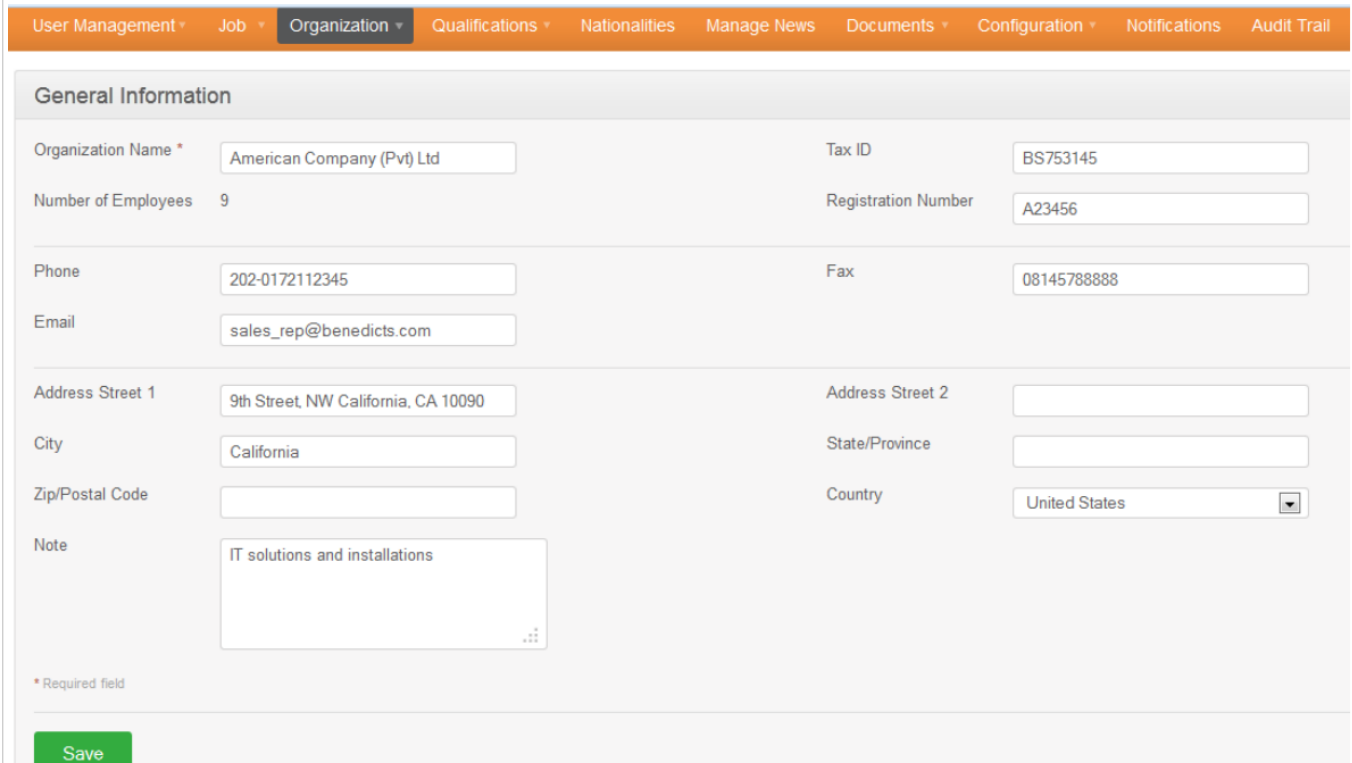
Work Shifts

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

Click "Save" once the fields are added.

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

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

Figure 2.4: Add Work Shift

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

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.

Figure 2.6: General Information

Locations

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

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

Click "Save" once the fields are added.

Figure 2.7: Add Location

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

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.
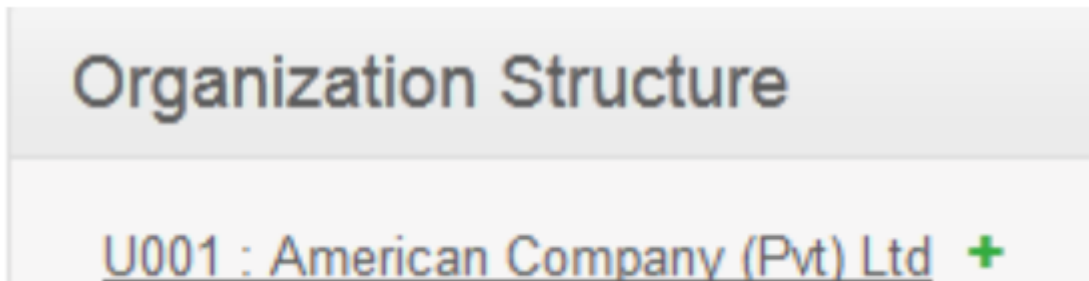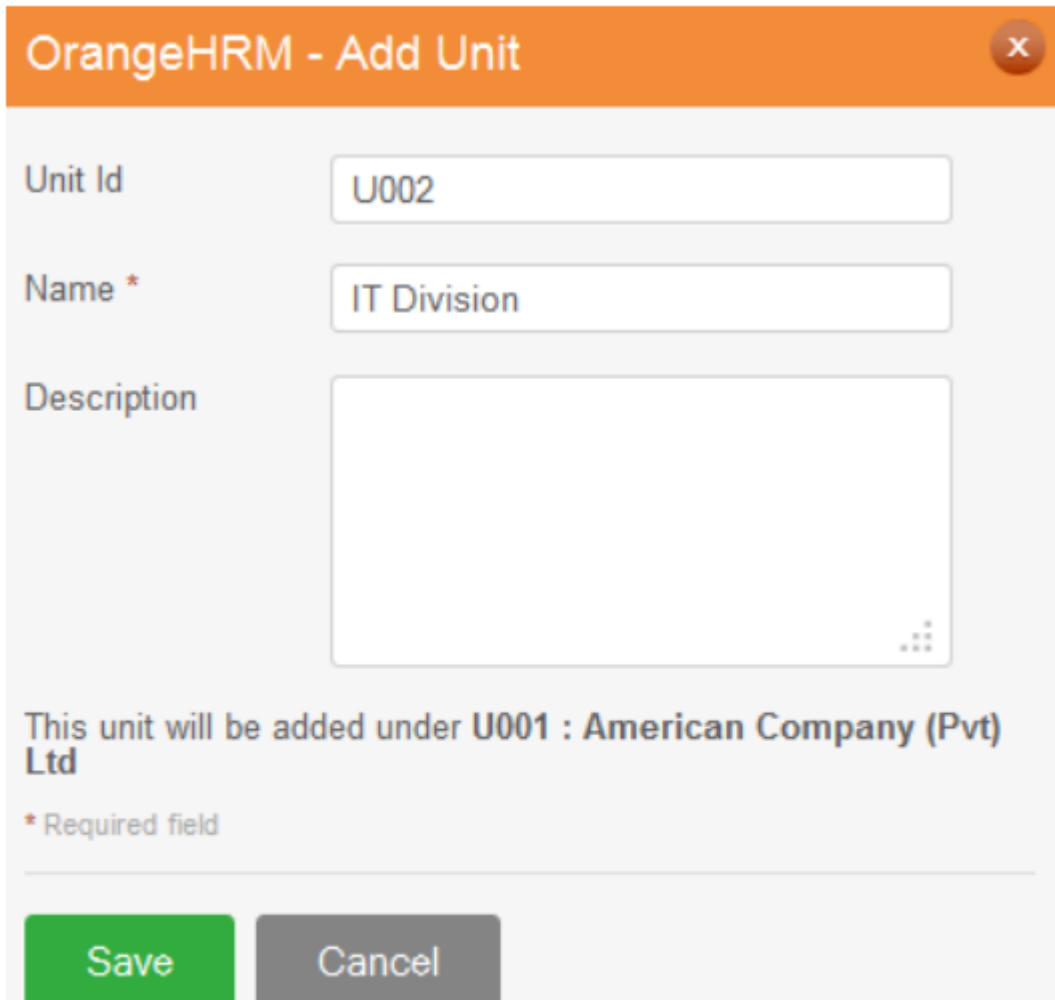

Figure 2.9: Add Sub-Unit

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

*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.

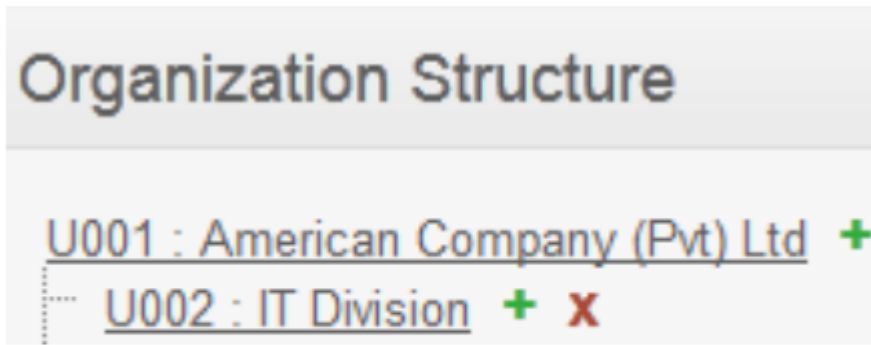Once you have entered the field, click "Save" and the Sub-Unit will appear as shown in Figure 3.1.

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

Admin					
User Management ▾	Job ▾	Organization ▾	Qualifications ▾	Nationalities	Configuration ▾

Figure 1.1: Admin Module

Fig. 1.1.png (42 kB)
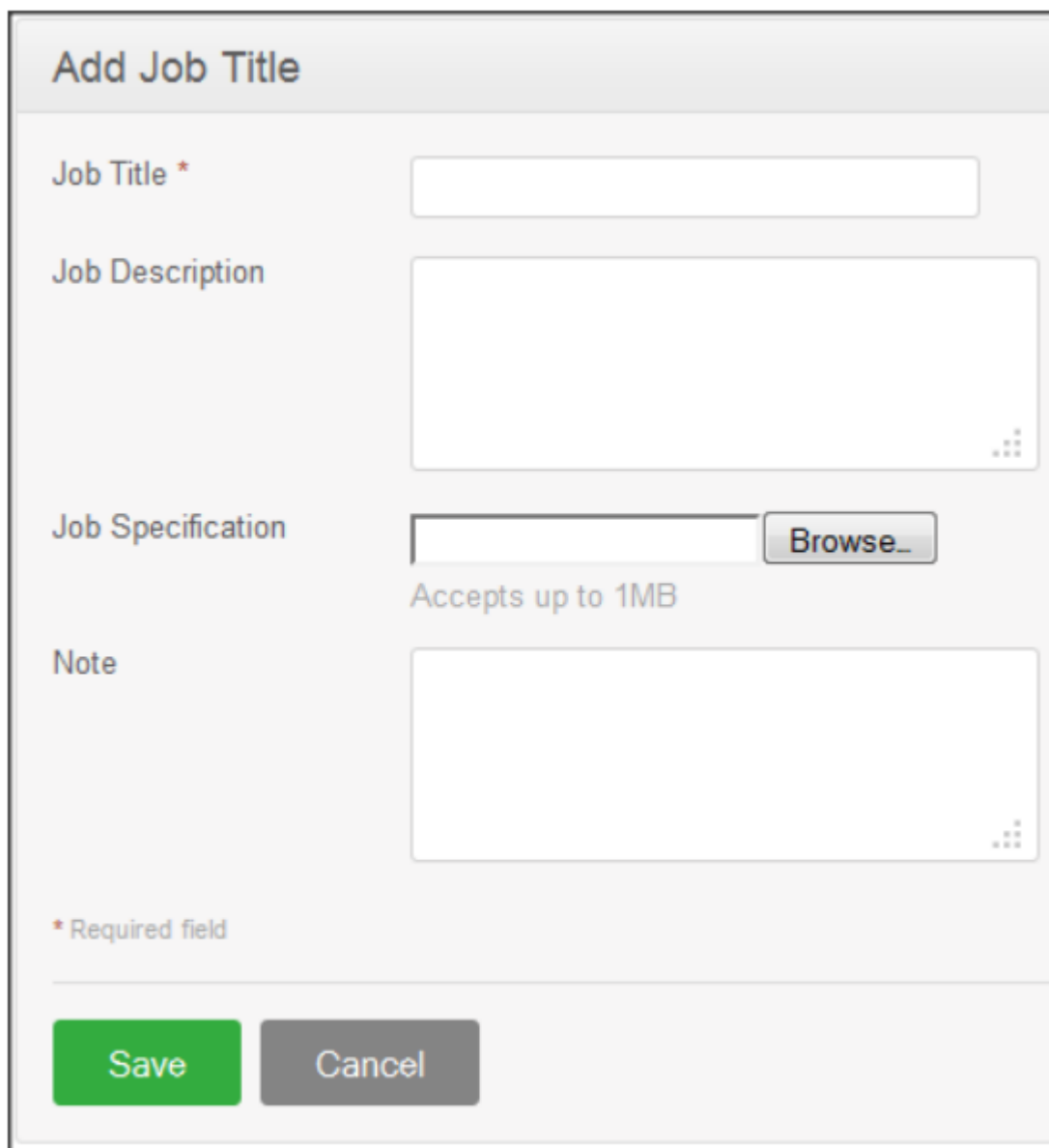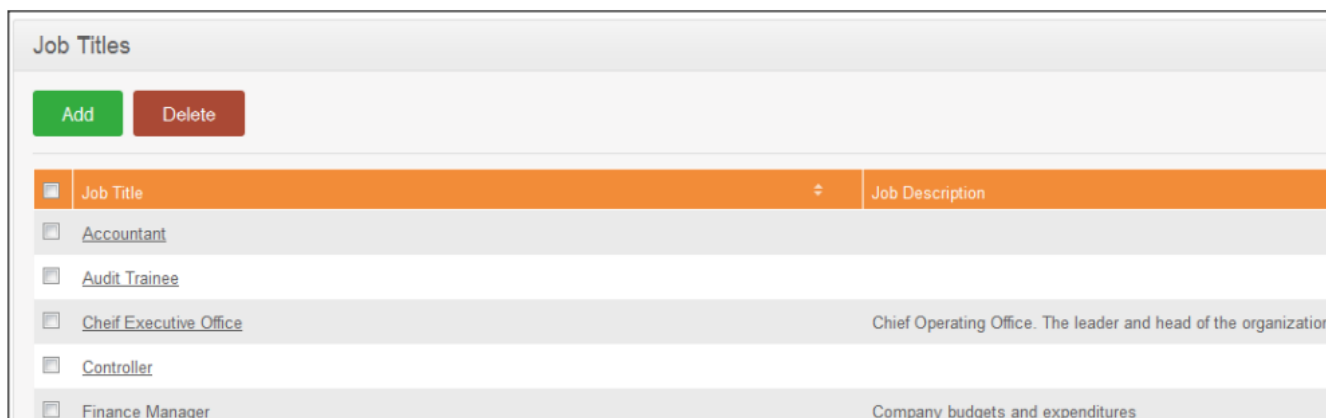
Add Job Title

Job Title *

Job Description

Job Specification   [   ] Browse_
Accepts up to 1MB

Note

* Required field

Save   Cancel

Figure 1.4: Add Job Title
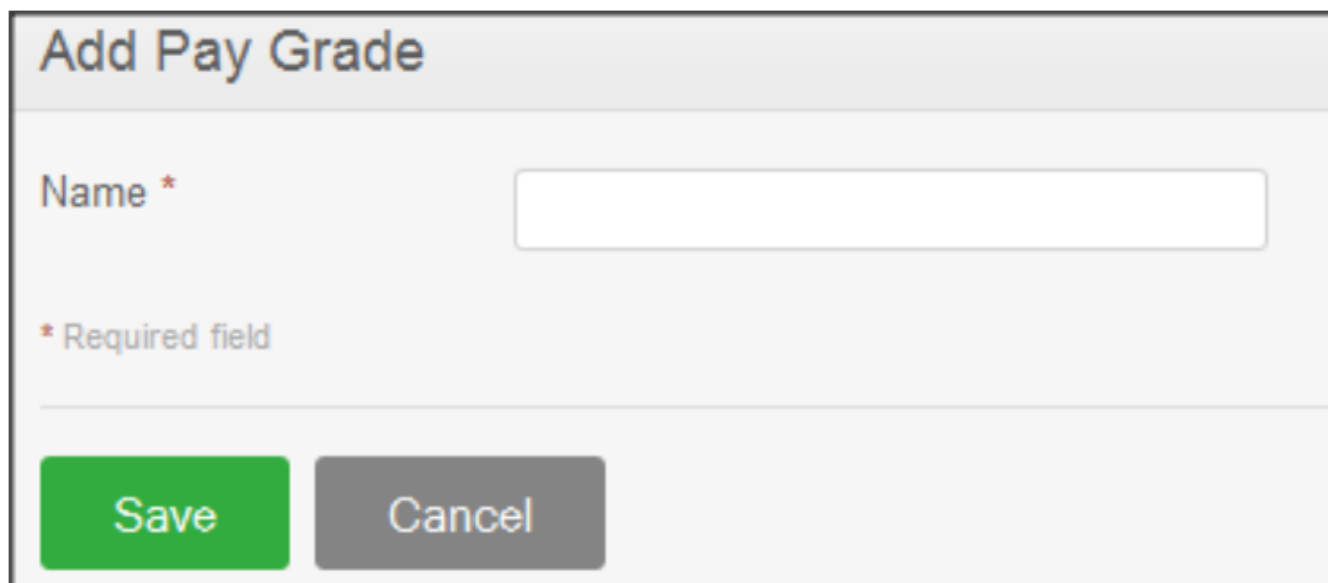
Fig. 1.4.png (37 kB)

Job Titles

| Add | Delete |

☐	Job Title	⇕	Job Description
☐	Accountant		
☐	Audit Trainee		
☐	Cheif Executive Office		Chief Operating Office. The leader and head of the organization
☐	Controller		
☐	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 * | Level 3 |

* Required field

Edit   **Cancel**

Add Currency

Currency * | USD - United States Dollar |

Minimum Salary | 40000 |

Maximum Salary | 50000 |

* Required field

Save   **Cancel**

Figure 1.7: Assign Pay Grade

Fig. 1.7.png (41 kB)

Edit Pay Grade

Name *
Level 1

* Required field

[Edit] [Cancel]

Assigned Currencies

[Add] [Delete]

☐	Currency	Minimum Salary	Maximum Salary
☐	United States Dollar	40,000.00	50,000.00
☐	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

[Add] [Delete]

☐	Pay Grade	⬍	Currency
☐	Level 1		United States Dollar,Utd. Arab Emir. Dirham
☐	Level 2		United States Dollar

Figure 1.9: Pay Grades List

Fig. 1.9.png (29 kB)

Add Employment Status

Name *
Regular Contract

* Required field

[Save] [Cancel]

Figure 2.0: Add Employment Status

Fig. 2.0.png (28 kB)
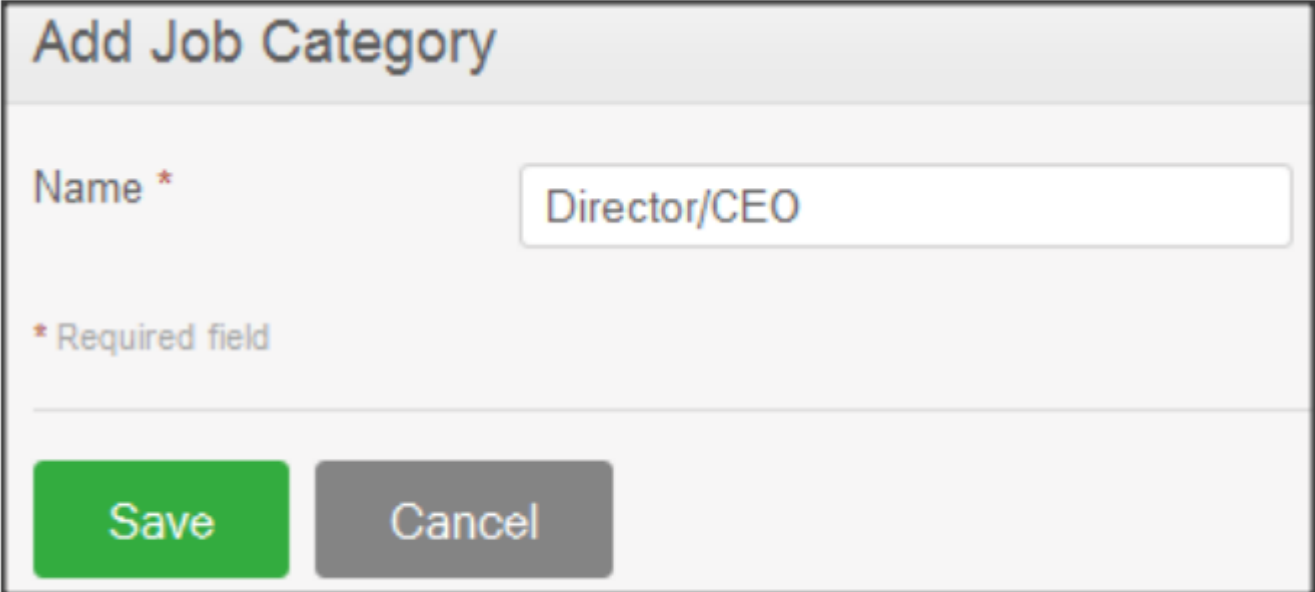
Figure 2.1: Employment Status List

Fig. 2.1.png (47 kB)

Add Job Category

Name *   Director/CEO

* Required field

[Save]   [Cancel]

Figure 2.2: Add Job Category

Fig. 2.2.png (35 kB)
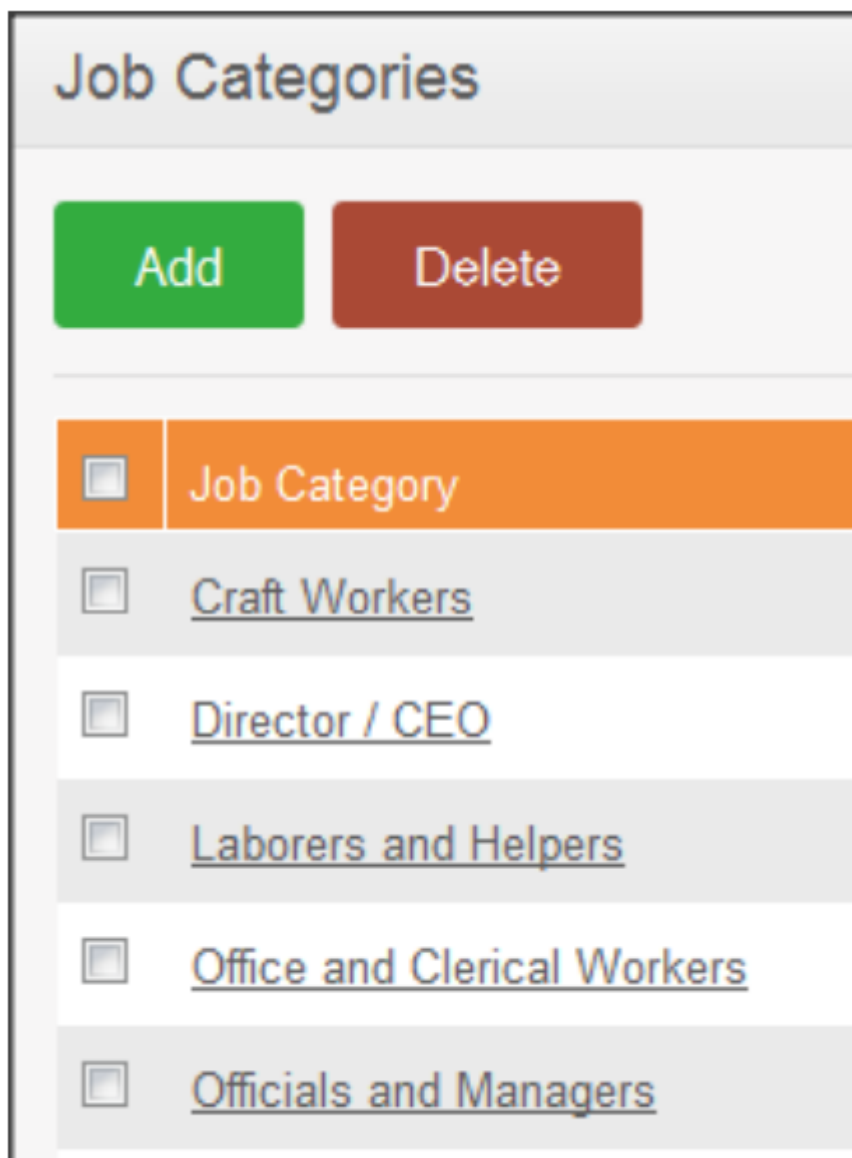
Figure 2.3: Job Category List

Fig. 2.3.png (66 kB)

Figure 2.4: Add Work Shift

Fig. 2.4.png (78 kB)

Figure 2.5: Work Shifts List

Fig. 2.5.png (33 kB)

| User Management ▾ | Job ▾ | **Organization** ▾ | Qualifications ▾ | Nationalities | Manage News | Documents ▾ | Configuration ▾ | Notifications | Audit 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)

Figure 2.7: Add Location

Fig. 2.7.png (25 kB)

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

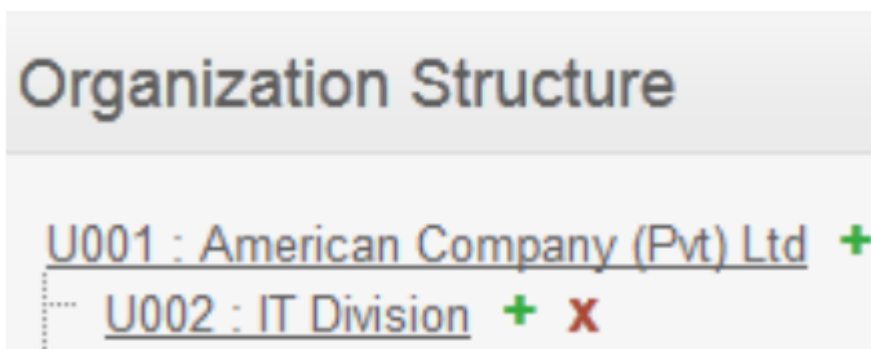## *Figure 3.0: Sub-Unit Details*

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