



ESS-Employee Self Service User Manual for OrangeHRM Version 3.0



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1.0 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.

2.0 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.

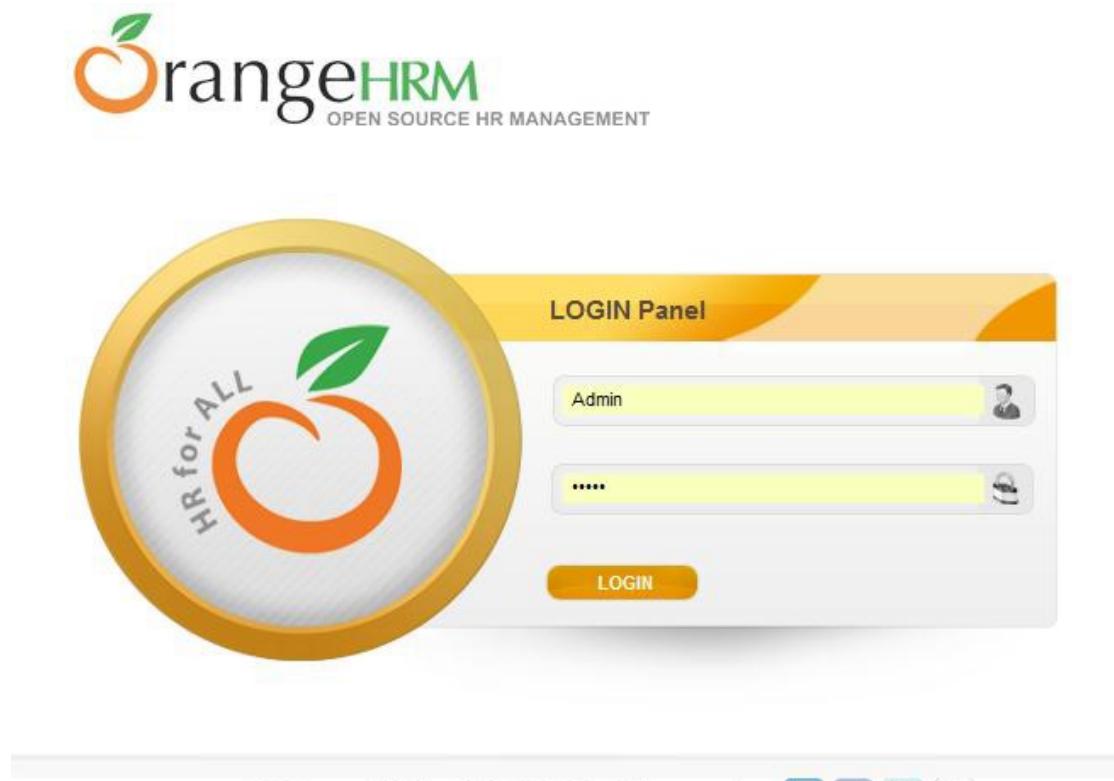


Figure 1.0: Log in Panel

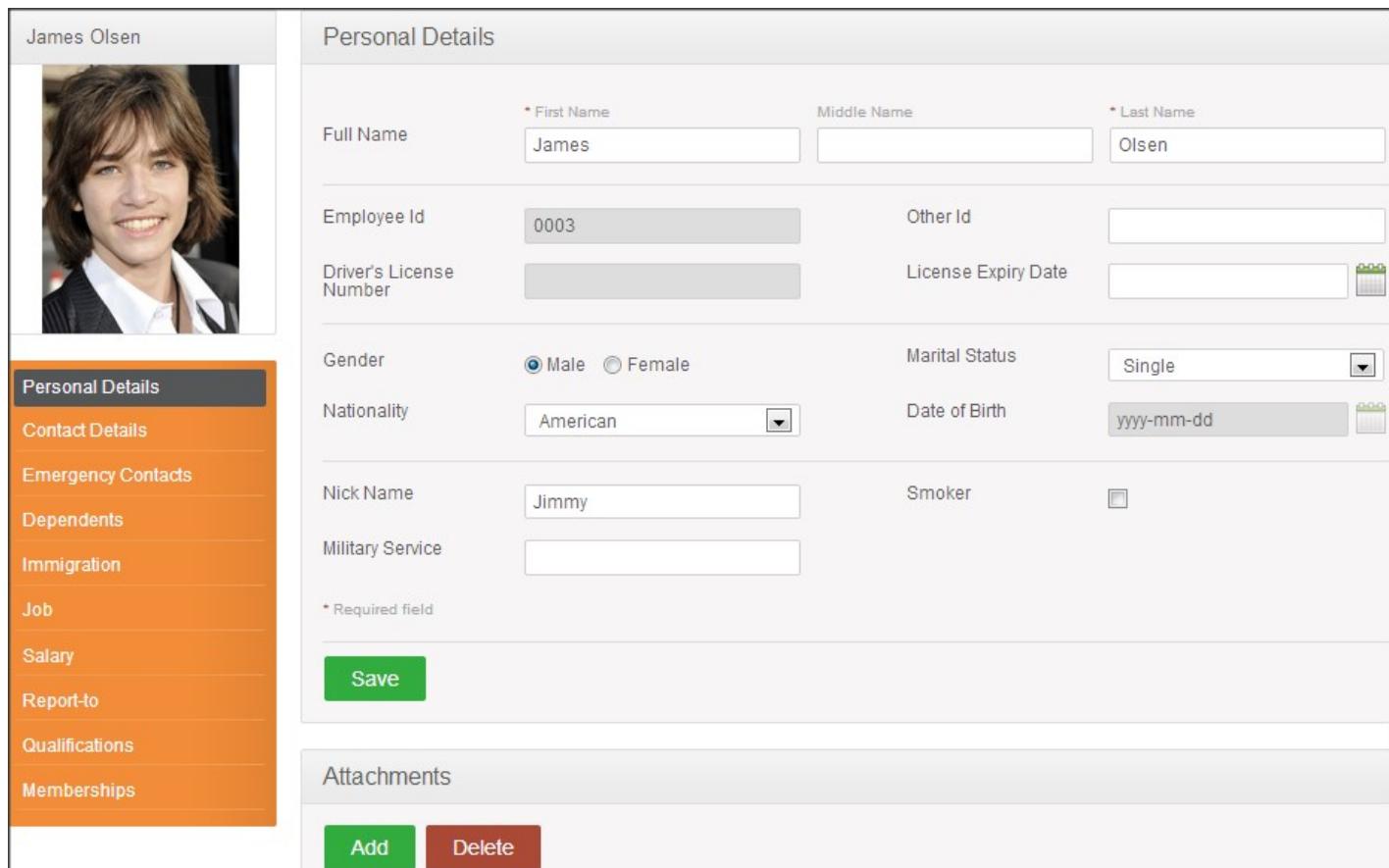
3.0 My Info Module

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.

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.



The screenshot shows the "Personal Details" form for an employee named James Olsen. The left sidebar has a navigation menu with options like Personal Details, Contact Details, Emergency Contacts, Dependents, Immigration, Job, Salary, Report-to, Qualifications, and Memberships. The main form displays fields for Full Name (First Name: James, Middle Name: [empty], Last Name: Olsen), Employee Id (0003), Other Id ([empty]), Driver's License Number ([empty]), License Expiry Date ([empty]), Gender (Male selected), Marital Status (Single), Nationality (American), Date of Birth (yyyy-mm-dd), Nick Name (Jimmy), Smoker (unchecked), and Military Service ([empty]). A note at the bottom says "Required field". There is a "Save" button and an "Attachments" section with "Add" and "Delete" buttons.

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.

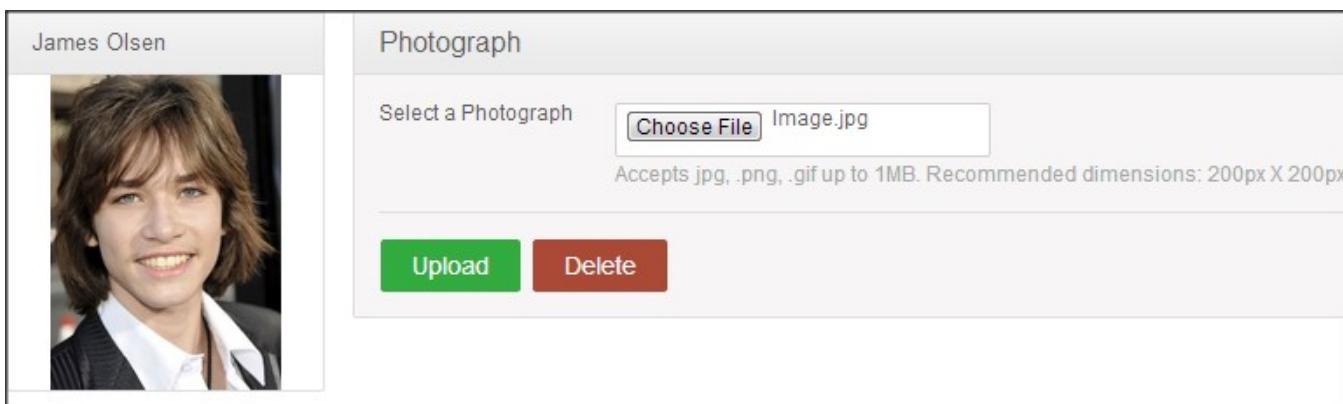


Figure 1.2: Photograph

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.

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"/> <input type="button" value="▼"/> |
| Zip/Postal Code | <input type="text" value="54312"/> |
| Country | <input type="text" value="United States"/> <input type="button" value="▼"/> |
| Home Telephone | <input type="text"/> |
| Mobile | <input type="text" value="+16543287434"/> |
| Work Telephone | <input type="text"/> |
| Work Email | <input type="text" value="jolsen@uspo.com"/> |
| Other Email | <input type="text" value="jolsen95@gmail.com"/> |
| <input type="button" value="Save"/> | |

Figure 1.3: Contact Details

Click “Edit” to enter the information.

You can edit the following:

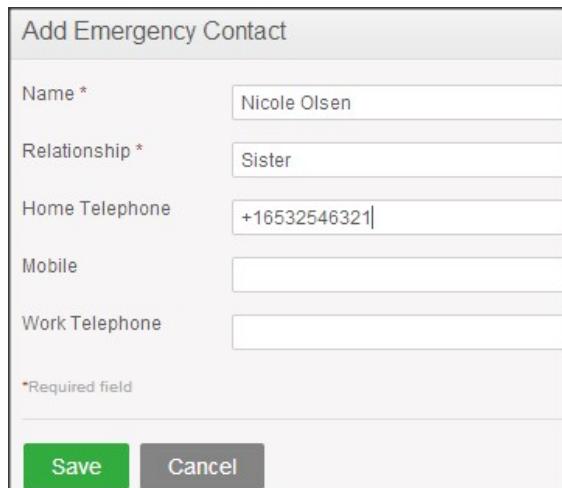
- Country – Select the country from the drop down
- Street 1
- Street 2
- City/Town
- State/Province – If the country is United States you can select from the drop down or you need to enter it manually
- ZIP Code
- Home Telephone
- Mobile
- Work Telephone
- Work Email
- Other Email

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.



The screenshot shows a modal dialog titled "Add Emergency Contact". It contains the following fields:

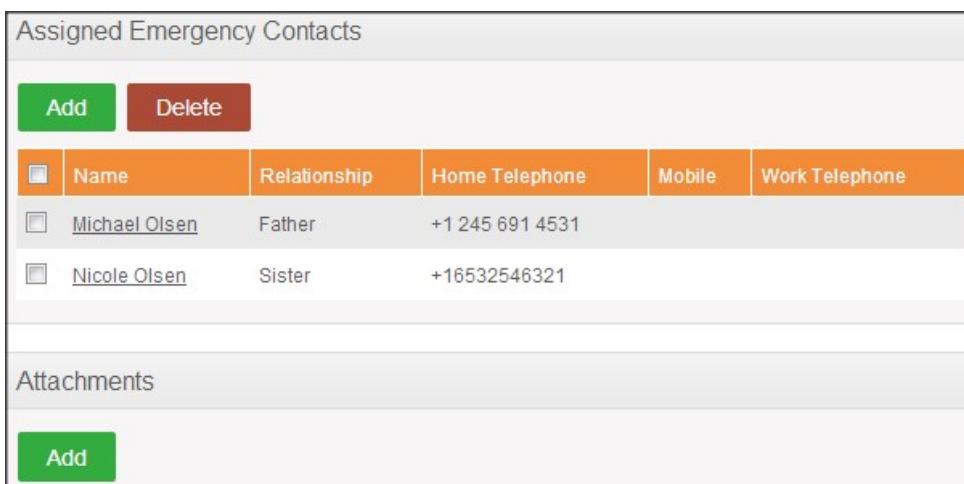
| | |
|----------------|--------------|
| Name * | Nicole Olsen |
| Relationship * | Sister |
| Home Telephone | +16532546321 |
| Mobile | [Empty] |
| Work Telephone | [Empty] |

A note at the bottom left says "Required field". At the bottom are two buttons: a green "Save" button and a grey "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



The screenshot shows a table titled "Assigned Emergency Contacts". It has two main sections: "Add" and "Delete". The "Add" section contains a "Name" input field and a "Save" button. The "Delete" section contains a "Delete" button. Below these are two rows of data:

| | Name | Relationship | Home Telephone | Mobile | Work Telephone |
|--------------------------|---------------|--------------|-----------------|--------|----------------|
| <input type="checkbox"/> | Michael Olsen | Father | +1 245 691 4531 | | |
| <input type="checkbox"/> | Nicole Olsen | Sister | +16532546321 | | |

Below the table is a section titled "Attachments" with a "Add" button.

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.



The screenshot shows a modal dialog titled "Add Dependent". It contains the following fields:

| | |
|------------------|---|
| Name * | Mary O'Connor |
| Relationship * | Other |
| Please Specify * | Wife |
| Date of Birth | 1994-01-19  |

*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 screenshot shows a table titled "Assigned Dependents" with the following data:

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

Figure 1.7: Assigned Dependents

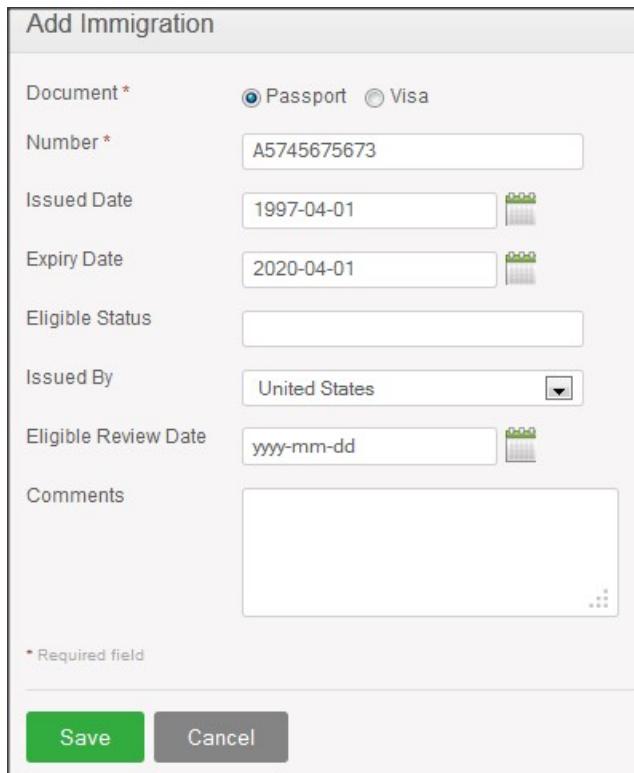
You may add multiple entries of dependants.

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 screenshot shows a modal dialog titled "Add Immigration". The form contains the following fields:

- Document *: Radio buttons for "Passport" (selected) and "Visa".
- Number *: Input field containing "A5745675673".
- Issued Date: Input field containing "1997-04-01" with a calendar icon.
- Expiry Date: Input field containing "2020-04-01" with a calendar icon.
- Eligible Status: Input field.
- Issued By: Drop-down menu showing "United States".
- Eligible Review Date: Input field containing "yyyy-mm-dd" with a calendar icon.
- Comments: Text area.

* Required field

Save Cancel

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 | | | | | |
|-----------------------------------|-------------|---------------|-------------|-------------|--|
| | | Add | Delete | | |
| Document | Number | Issued By | Issued Date | Expiry Date | |
| <input type="checkbox"/> Passport | A5745675673 | United States | 1997-04-01 | 2020-04-01 | |
| Attachments | | | | | |
| <button>Add</button> | | | | | |

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

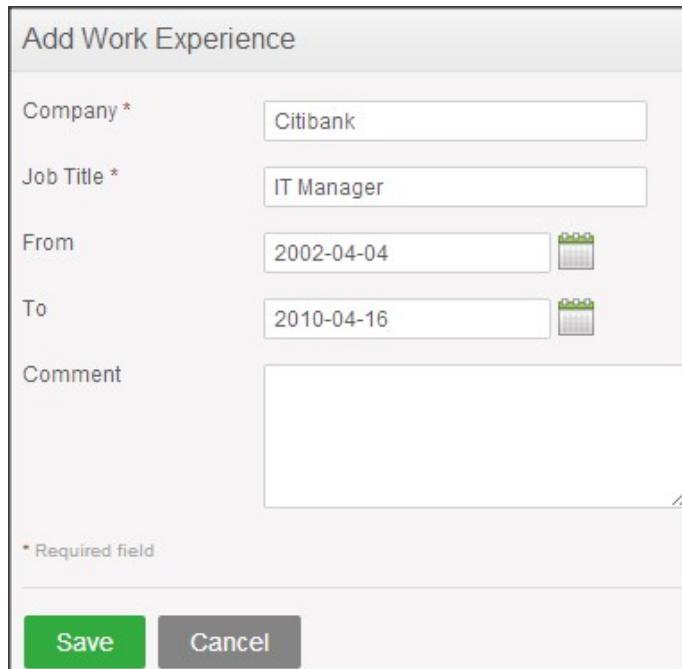
| Assigned Supervisors | |
|-----------------------|------------------|
| Name | Reporting Method |
| Kevin Ryan | Direct |
| Assigned Subordinates | |
| Name | Reporting Method |
| No Records Found | |

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.



Add Work Experience

Company * Citibank

Job Title * IT Manager

From 2002-04-04

To 2010-04-16

Comment

* Required field

Save Cancel

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

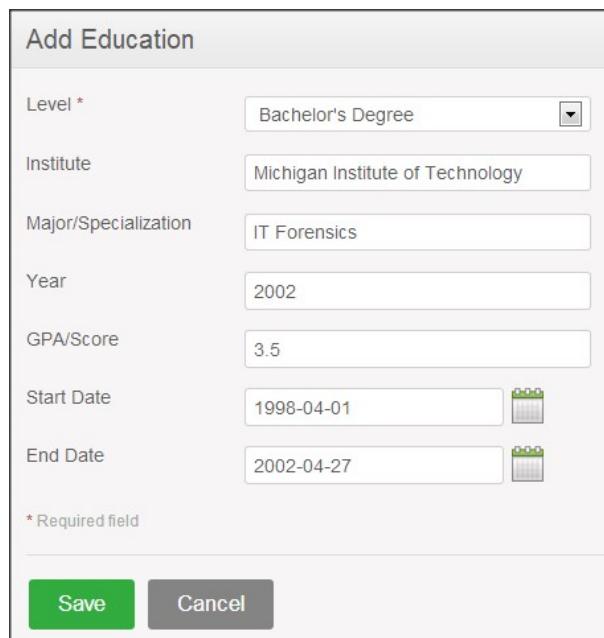
Figure 2.4: Work Experience List

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".

- **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.



| Add Education | |
|----------------------|----------------------------------|
| Level * | Bachelor's Degree |
| Institute | Michigan Institute of Technology |
| Major/Specialization | IT Forensics |
| Year | 2002 |
| GPA/Score | 3.5 |
| Start Date | 1998-04-01 |
| End Date | 2002-04-27 |
| * Required field | |
| Save | Cancel |

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

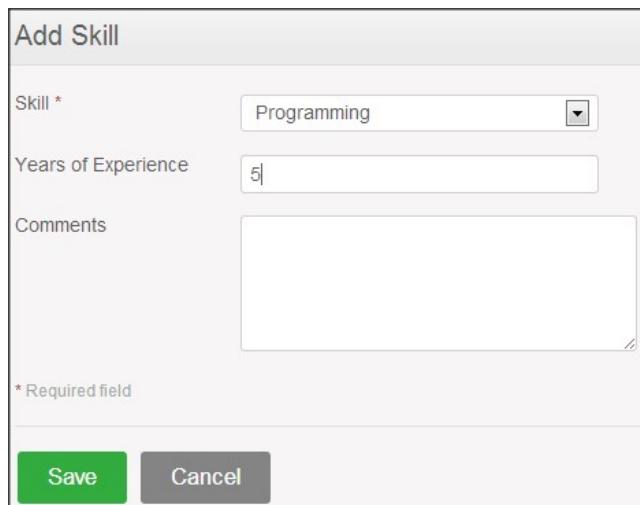
Figure 2.6: Education history

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”.

- Skills

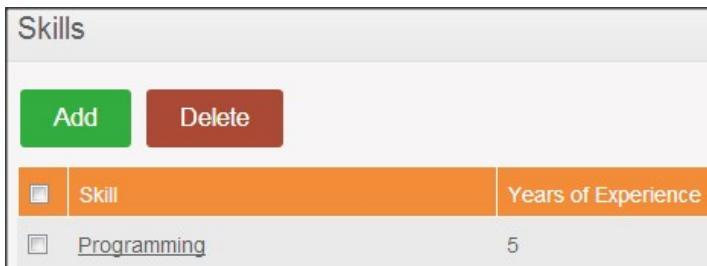
If you have any special talents or skills they can be entered here. To enter skills, click “Add” under “Skills” and the screen as shown in Figure 2.7 will appear.



The screenshot shows a modal dialog titled "Add Skill". It contains three input fields: "Skill *", which has "Programming" selected; "Years of Experience", which has "5" entered; and "Comments", which is an empty text area. A note at the bottom left says "* Required field". At the bottom are two buttons: "Save" (green) and "Cancel" (grey).

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.



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

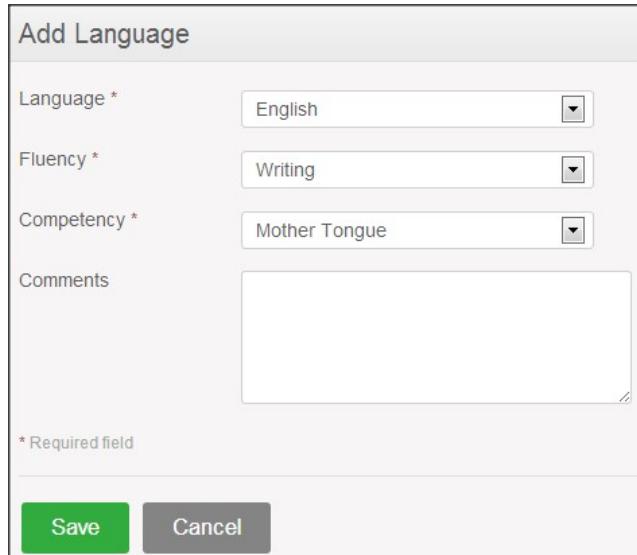
Figure 2.8: List of Skills

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”.

- **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.



The screenshot shows a modal dialog titled "Add Language". It contains four input fields: "Language *", "Fluency *", "Competency *", and a "Comments" area. The "Language" field has "English" selected. The "Fluency" field has "Writing" selected. The "Competency" field has "Mother Tongue" selected. The "Comments" area is empty. Below the fields, a note says "* Required field". At the bottom are two buttons: a green "Save" button and a grey "Cancel" button.

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.



The screenshot shows a table titled "Languages". It has a header row with columns for "Language", "Fluency", "Competency", and "Comments". Below the header, there is one data row showing "English", "Writing", and "Mother Tongue". There are also "Add" and "Delete" buttons at the top left of the table.

| Language | Fluency | Competency | Comments |
|----------|---------|---------------|----------|
| English | Writing | Mother Tongue | |

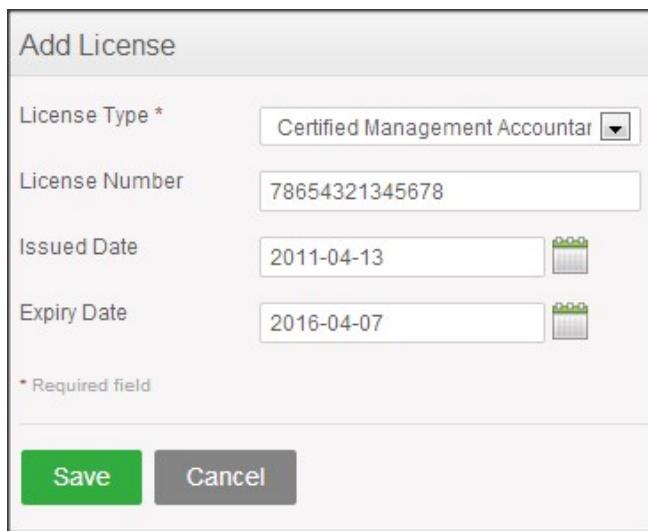
Figure 3.0: List of Languages of Competency

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”.

- 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.



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 | 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”.

- 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.

A screenshot of a web-based form titled "Add Attachment". It has two main sections: "Select File" and "Comment". In the "Select File" section, there is a "Choose File" button with the text "Certs.docx" next to it, and a note below stating "Accepts up to 1MB". In the "Comment" section, there is a text area containing the word "Certificates". At the bottom of the form are two buttons: a green "Upload" button and a grey "Cancel" button.

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 |

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 member 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.

Add Membership

| | |
|----------------------------|--|
| Membership * | Association for Financial Professsionals |
| Subscription Paid By | Company |
| Subscription Amount | 5500 |
| Currency | United States Dollar |
| Subscription Commence Date | 2009-01-06 |
| Subscription Renewal Date | 2013-04-19 |

* Required field

Save **Cancel**

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

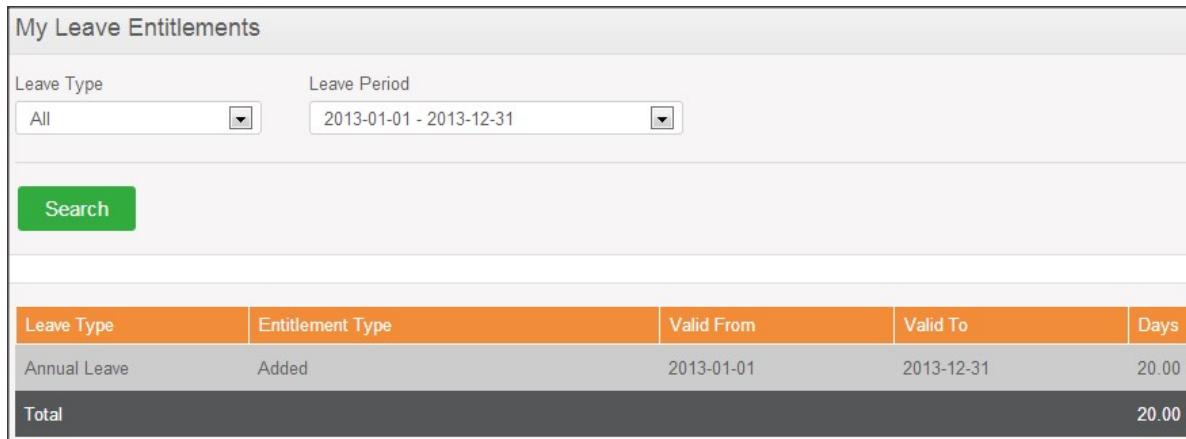
The ESS-User will be able to view the following on the Leave Module which will further be explained in detail:

- 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.



The screenshot shows a user interface titled "My Leave Entitlements". At the top, there are two dropdown menus: "Leave Type" set to "All" and "Leave Period" set to "2013-01-01 - 2013-12-31". Below these is a green "Search" button. The main area displays a table with the following data:

| 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>>Entitlements>> 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-

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

To

Show Leave with Status All Rejected Cancelled Pending Approval Scheduled Taken

Search **Reset**

| 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) | <input type="button" value="Edit"/> | Select Action <input type="button" value="▼"/> |

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 | | <div style="border: 1px solid #ccc; padding: 2px;"> Select Action </div> <div style="background-color: #0070C0; color: white; padding: 2px;">Select Action</div> <div style="border: 1px solid #ccc; background-color: #f0f0f0; padding: 2px;">Cancel</div> |
| 2013-04-13 | | 11.00 | | Weekend | | |
| 2013-04-14 | | 11.00 | | Weekend | | |
| 2013-04-15 | Annual Leave | 11.00 | 8.00 | Pending Approval | | <div style="border: 1px solid #ccc; padding: 2px;"> Select Action </div> <div style="border: 1px solid #ccc; background-color: #f0f0f0; padding: 2px;">Select Action</div> |
| 2013-04-16 | Annual | 11.00 | 8.00 | Pending Approval | | <div style="border: 1px solid #ccc; padding: 2px;"> Select Action </div> <div style="border: 1px solid #ccc; background-color: #f0f0f0; padding: 2px;">Select Action</div> |

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 * | Annual Leave | | |
| Leave Balance | 14.00 view details | | |
| From Date * | 2013-04-26 <input type="button" value="Calendar"/> | | |
| To Date * | 2013-04-26 <input type="button" value="Calendar"/> | | |
| Time | From <input type="button" value="09:00"/> <input type="button" value="▼"/> | To <input type="button" value="12:00"/> <input type="button" value="▼"/> | Duration <input type="button" value="3"/> |
| Comment | Half day leave. | | |
| * Required field | | | |
| Apply | | | |

Figure 4.0: Apply for Leave

Select the leave type from the drop down menu and the “From Date” and “To Date” you require the leave, once you select the dates you will see the “From Time”, “To Time” and “Total Hours”. You can enter the times and the “Total Hours” would automatically populate. The “Leave Balance” would also appear indicating how many leave balance you have for the particular leave type. You may also add a comment on why you need the leave.

***Note:** If you are applying for leave for less than 24 hours, the “From Time” and “To Time” option would appear prompting you to enter the times in which you would be on leave.

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. <input type="button" value="Comment"/> | <input type="button" value="Select Action"/> |
| 2013-04-12 to 2013-04-24 | James Olsen | Annual Leave | 10.63 | 9.00 | Pending Approval(9.00) | <input type="button" value="Comment"/> | <input type="button" value="Select Action"/> |
| Save | | | | | | | |

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:

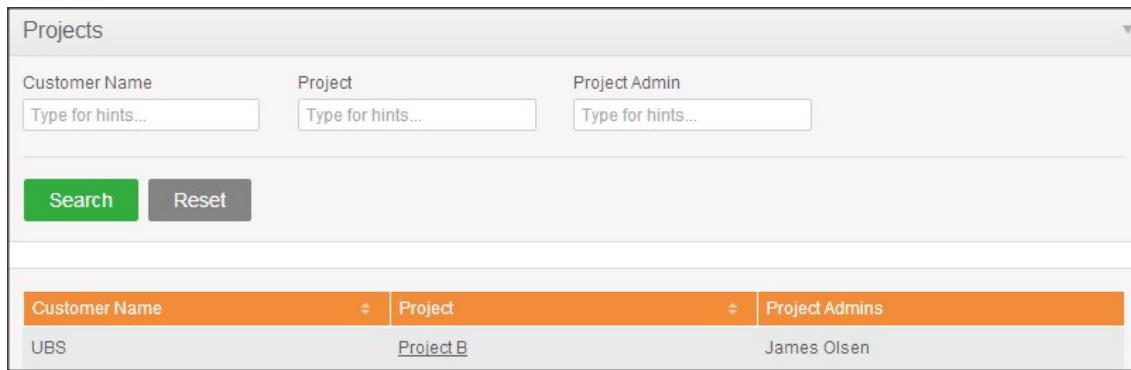
- Project Info
- Timesheet
 - My Timesheet
- Attendance
 - My Records
 - Punch-In/Out

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 search interface for projects. At the top, there are three input fields labeled 'Customer Name', 'Project', and 'Project Admin', each with a placeholder 'Type for hints...'. Below these are two buttons: 'Search' (in green) and 'Reset' (in grey). The main area displays a table with three columns: 'Customer Name', 'Project', and 'Project Admins'. The first row shows 'UBS' under Customer Name, 'Project B' under Project, and 'James Olsen' under Project Admins. The table has a header row with a light orange background.

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.

Project

| | |
|-----------------|-------------|
| Customer Name * | UBS |
| Name * | Project B |
| Project Admin | James Olsen |
| Description | |

* Required field

Cancel

Activities

| | | |
|--------------------------|-------------------|------------------|
| Add | Delete | Copy From |
| <input type="checkbox"/> | Activity Name | |
| <input type="checkbox"/> | Recruitment | |
| <input type="checkbox"/> | 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.

Add Project Activity

| | |
|--------|--------------------|
| Name * | Marketing Campaign |
|--------|--------------------|

* Required field

Save **Cancel**

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.

Edit Project Activity

| | |
|------------------|-------------------|
| Name * | Vendor Management |
| * Required field | |
| Save | Cancel |

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”.

Copy Activity

| | |
|---|----------------------|
| Project Name * | Citibank - Project A |
| <input checked="" type="checkbox"/> Recruitment <input type="checkbox"/> Vendor Management | |
| * Required field | |
| Copy | Cancel |

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 | | | | |
| <small>* Deleted project activities are not editable</small> 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 | <input type="button" value="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

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

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.

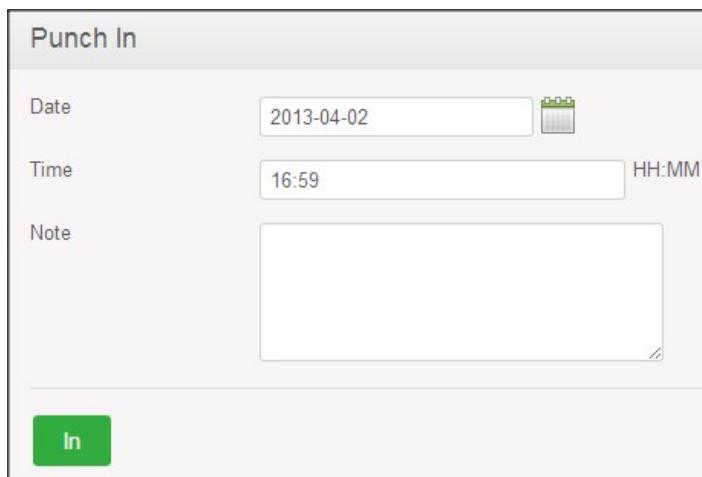
However if the submitted timesheet has been “Rejected”, the ESS-User will be notified and is able to “Edit” the timesheet and re-submit the timesheet for approval.

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 screenshot shows a user interface for 'Punch In'. The title 'Punch In' is at the top left. Below it are three input fields: 'Date' (set to 2013-04-02) with a calendar icon, 'Time' (set to 16:59 HH:MM), and 'Note' (an empty text area). At the bottom left 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”.

Punch Out

| | |
|-----------------|---|
| Punched in Time | 2013-04-02 16:59 |
| Date | <input type="text" value="2013-04-02"/>  |
| Time | <input type="text" value="17:01"/> HH:MM |
| Note | <input type="text"/> |
| Out | |

Figure 5.4: Punch Out

My Records

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.

My Attendance Records

| | |
|------|--|
| Date | <input type="text" value="2013-04-02"/>  |
|------|--|

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.

| Edit | Delete | | | | |
|---|---------------|--------------------------------|----------------|-----------------|--|
| 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

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>>Reviews** and the screen as shown in Figure 5.7 will appear.

| <input checked="" type="checkbox"/> | Employee | Job Title | Review Period | Due Date | Status | Reviewer |
|-------------------------------------|-------------|----------------------|-------------------------|------------|-----------|------------|
| <input type="checkbox"/> | James Olsen | Operations Executive | 2013-04-01 - 2013-06-19 | 2013-07-08 | Submitted | Kevin Ryan |

Figure 5.7: Performance 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 name of the “Reviewer”.

The outcome of the review will not be visible to the ESS-User; however the Admin and the Reviewer will be able to view the outcome.

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