ESS-Employee Self Service User Manual for OrangeHRM Version 3.0

Contents

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.

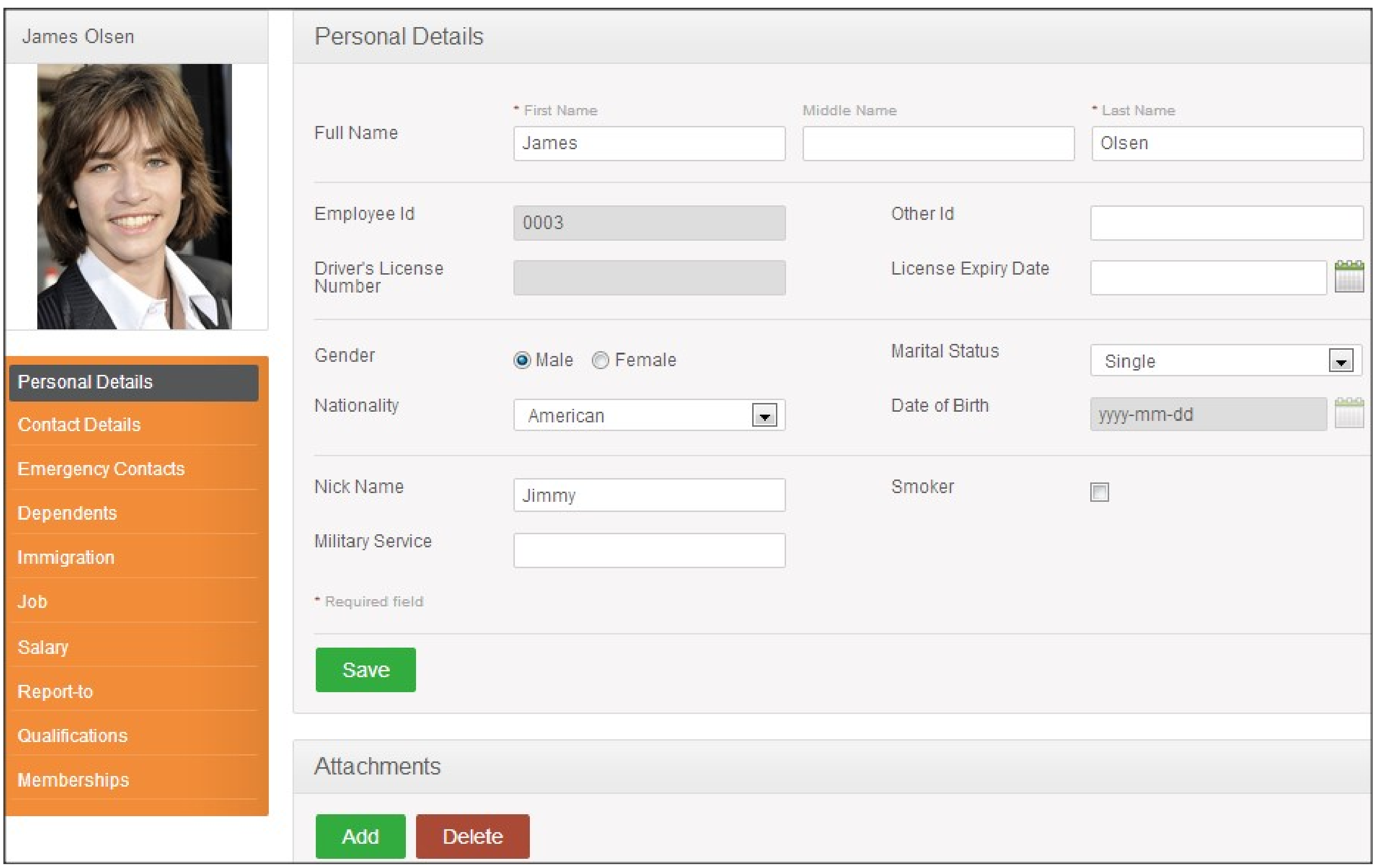


Figure 1.1: Personal Details

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.

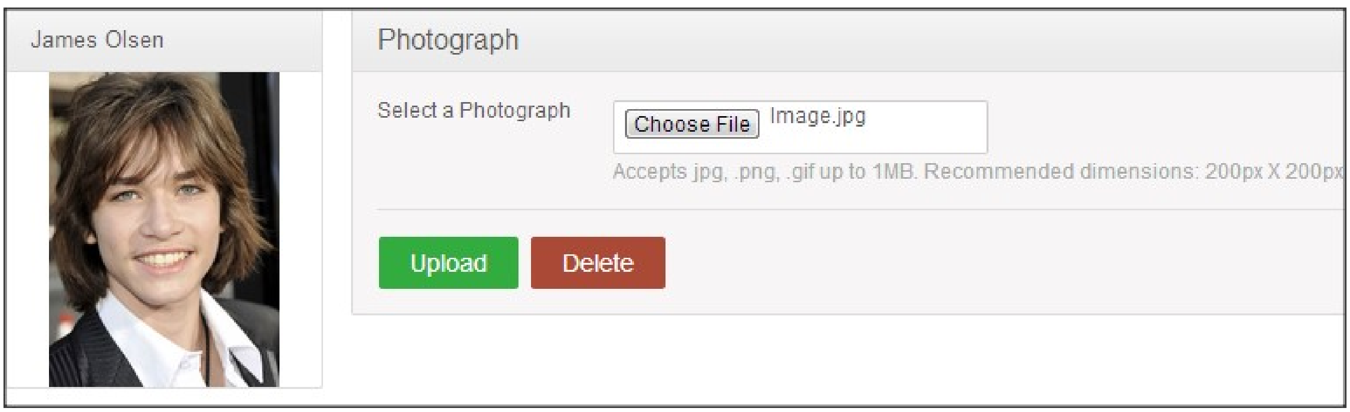


Figure 1.2: Photograph

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.

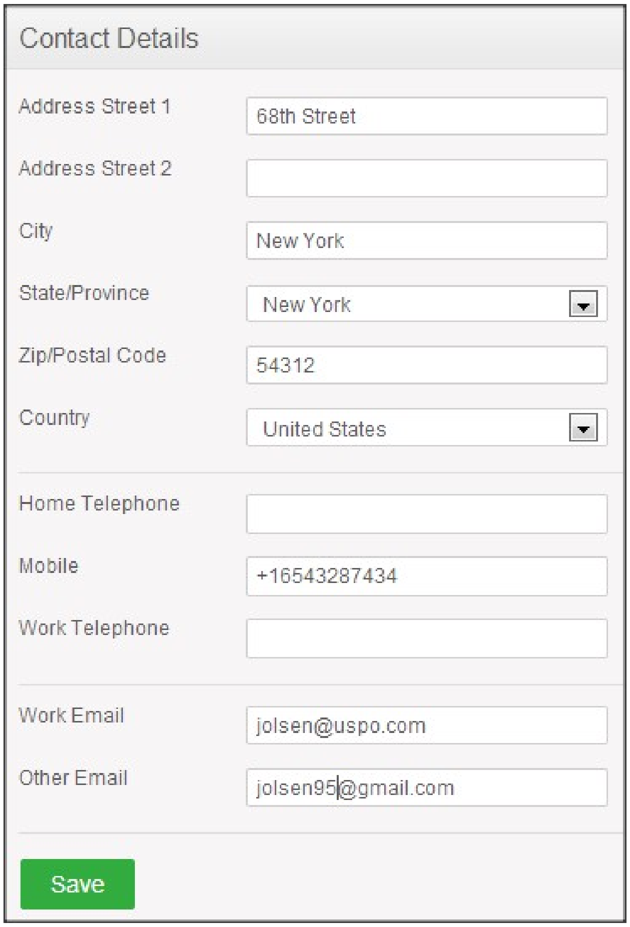


Figure 1.3: Contact Details

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 Sates 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.

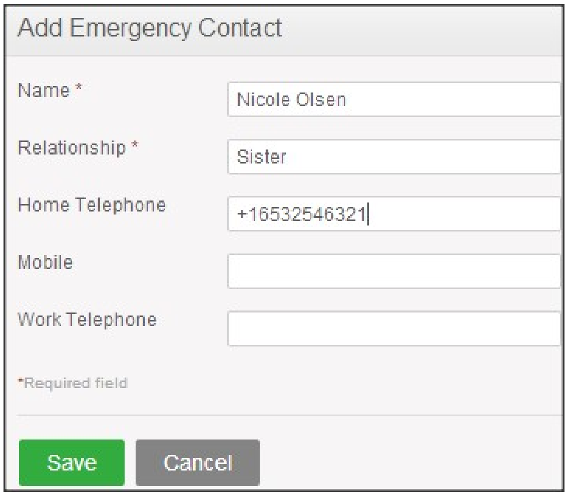


Figure 1.4: Add Emergency Contact

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

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.

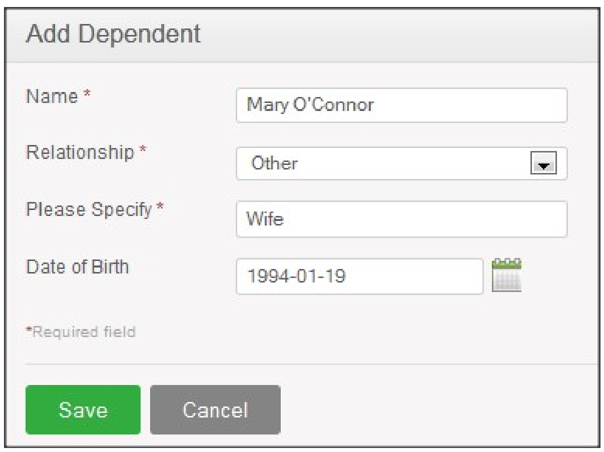


Figure 1.6: Add Dependents

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.

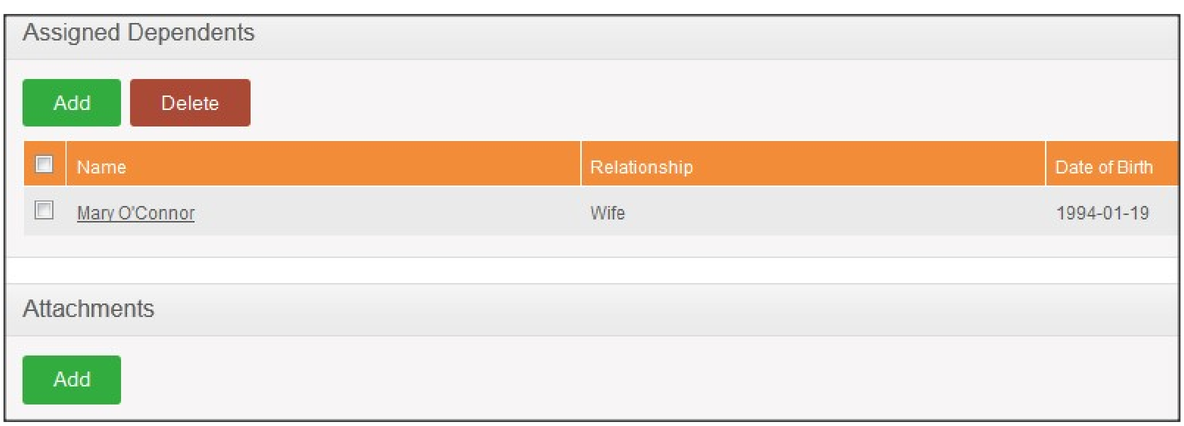


Figure 1.7: Assigned Dependents

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.

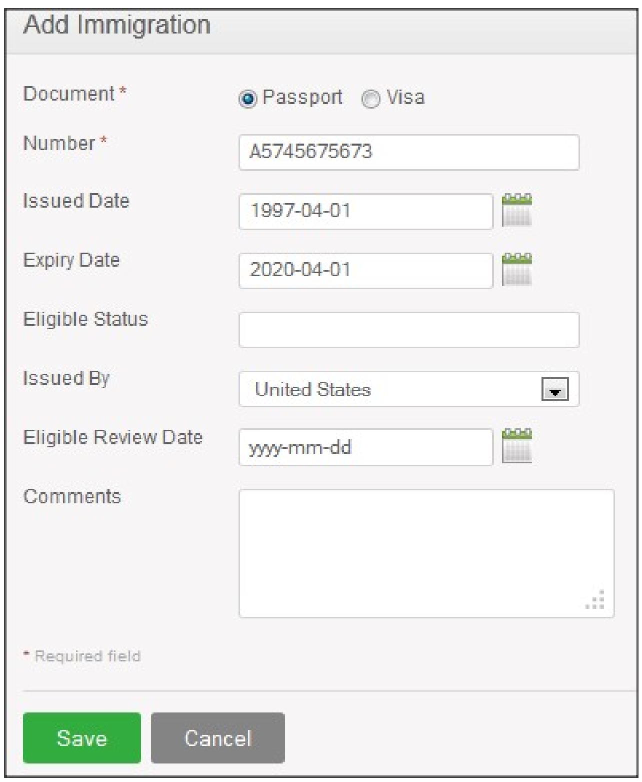


Figure 1.8: Add Immigration

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.

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

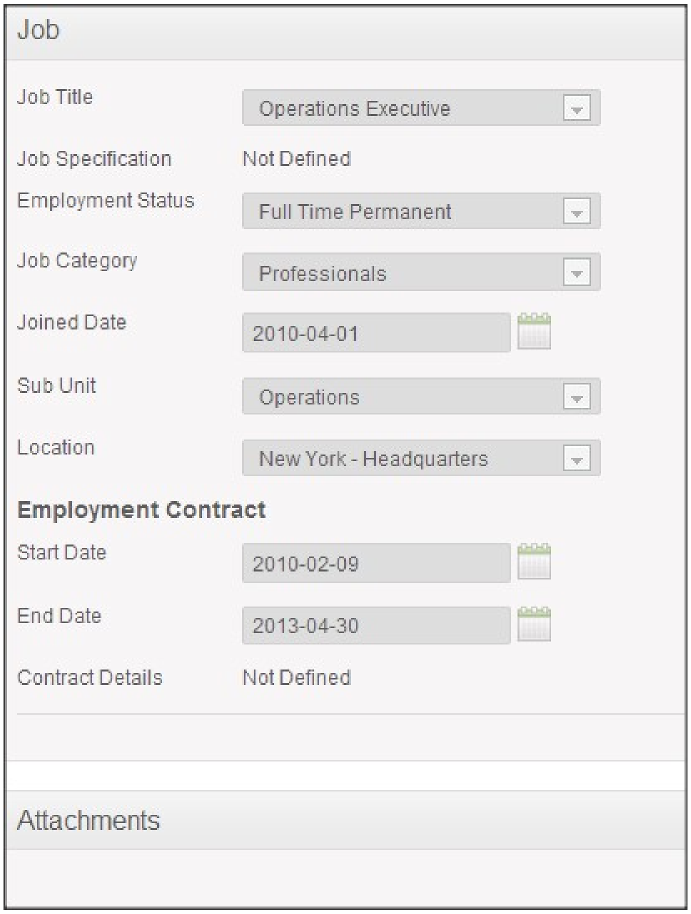


Figure 2.0: Job Details

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		☑

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.

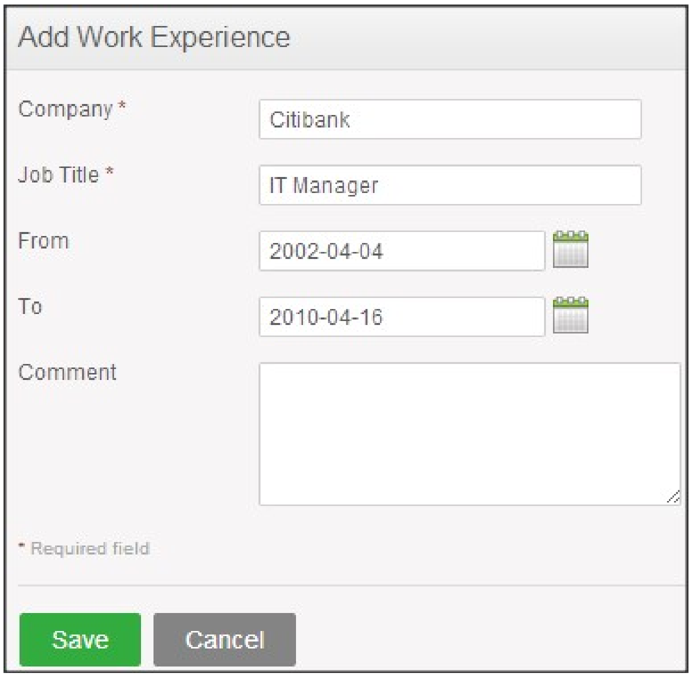


Figure 2.3: Add Work Experience

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

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.

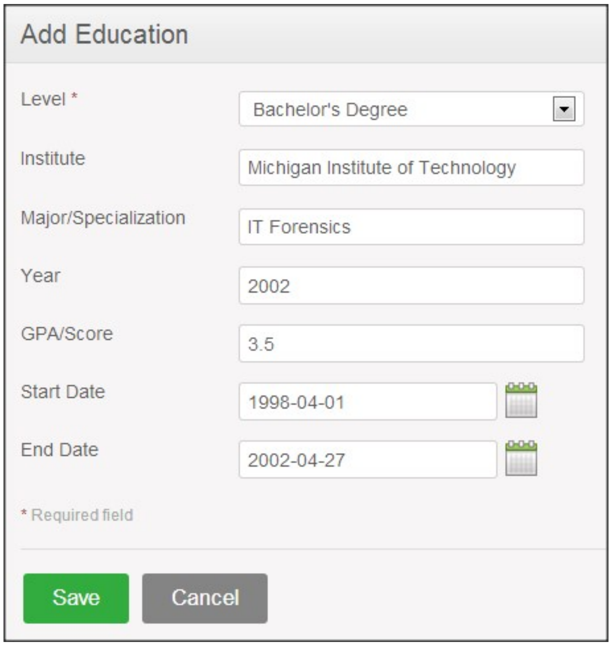


Figure 2.5: Add Education

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

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.

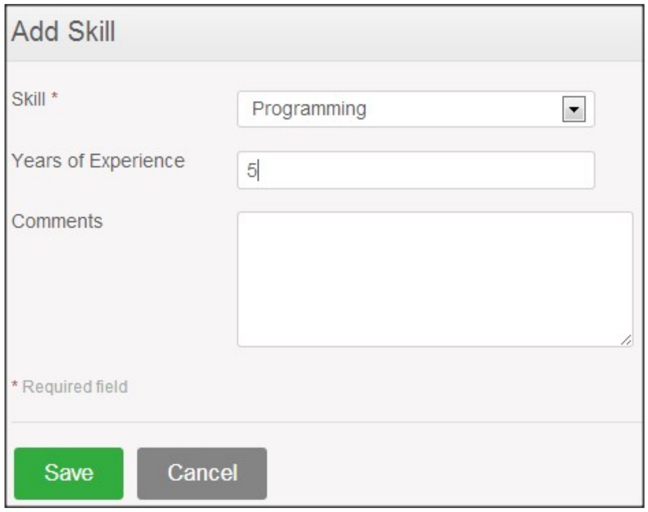


Figure 2.7: Add Skill

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

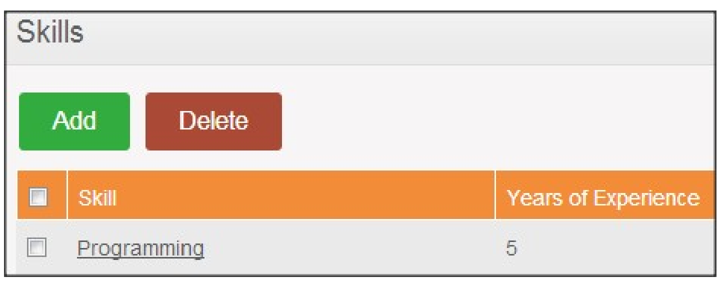


Figure 2.8: List of Skills

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.

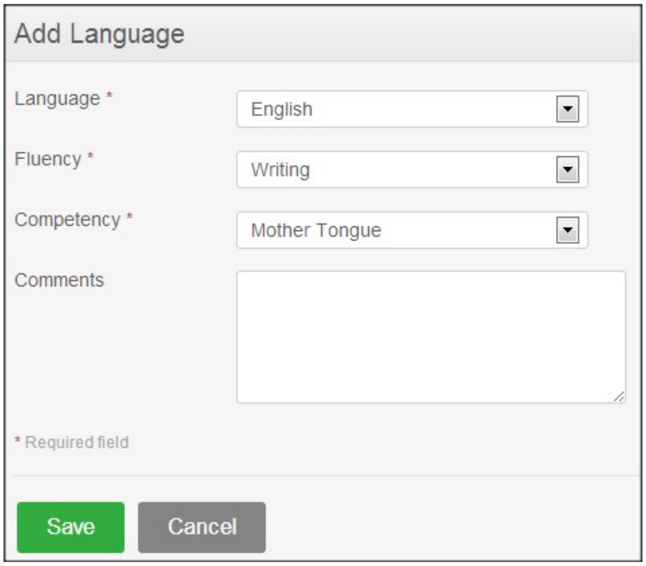


Figure 2.9: Add Language

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

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.

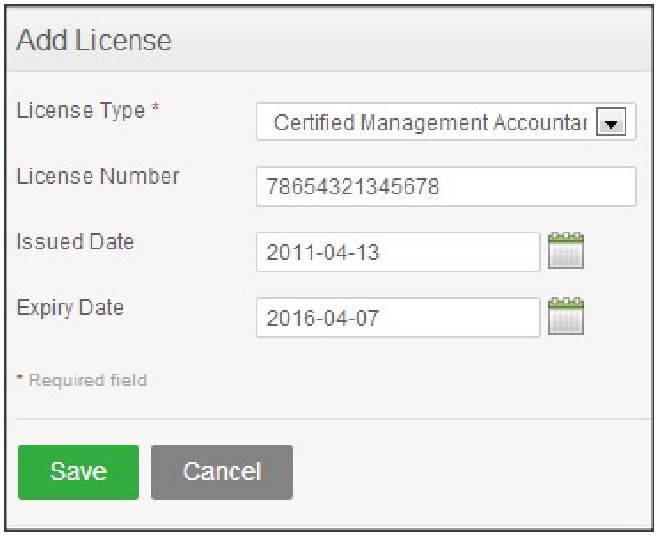


Figure 3.1: Add License

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

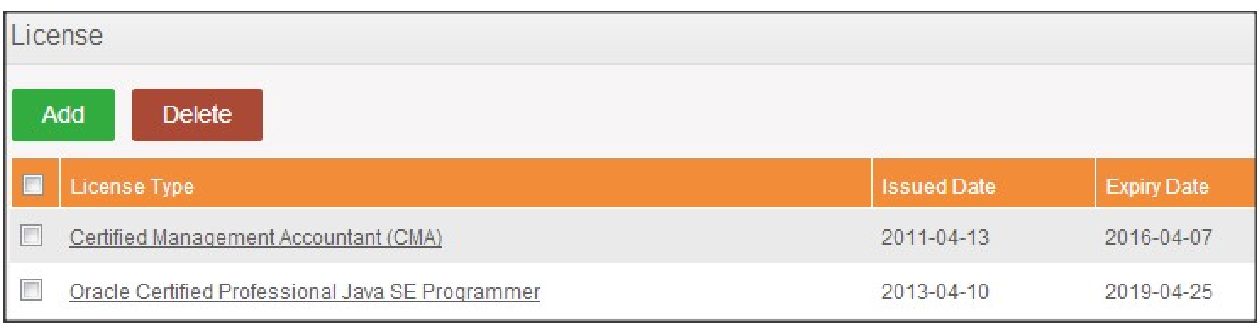


Figure 3.2: List of Licenses

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.

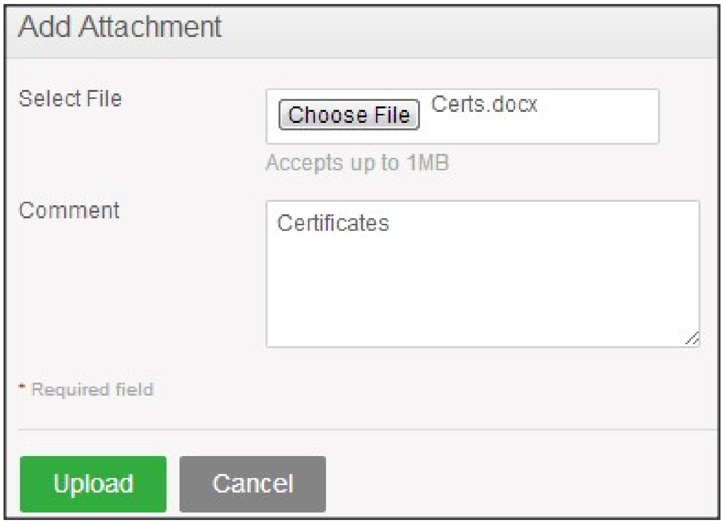


Figure 3.3: Add Attachment

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

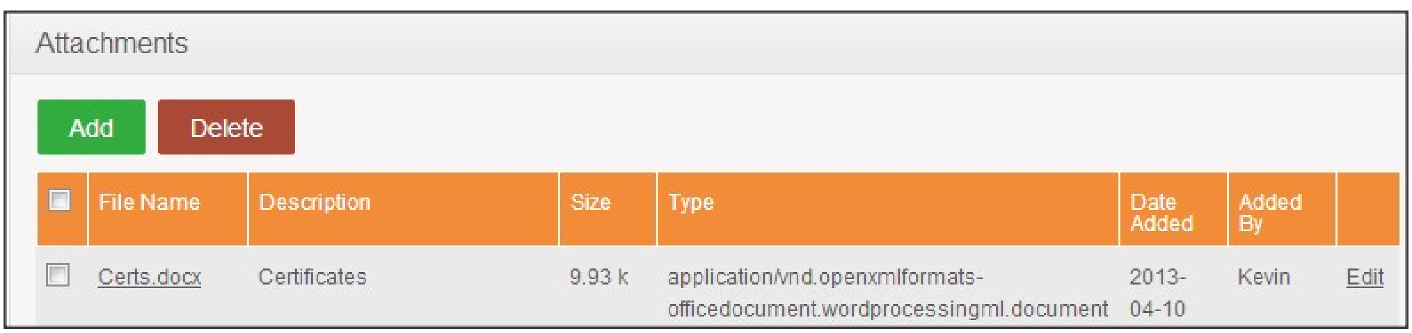


Figure 3.4: List of Attachments

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 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.

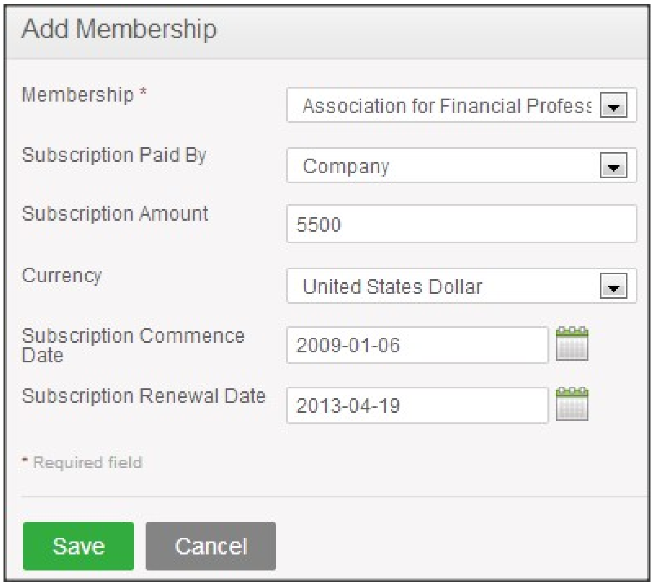


Figure 3.5: Add Membership Details

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
	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.

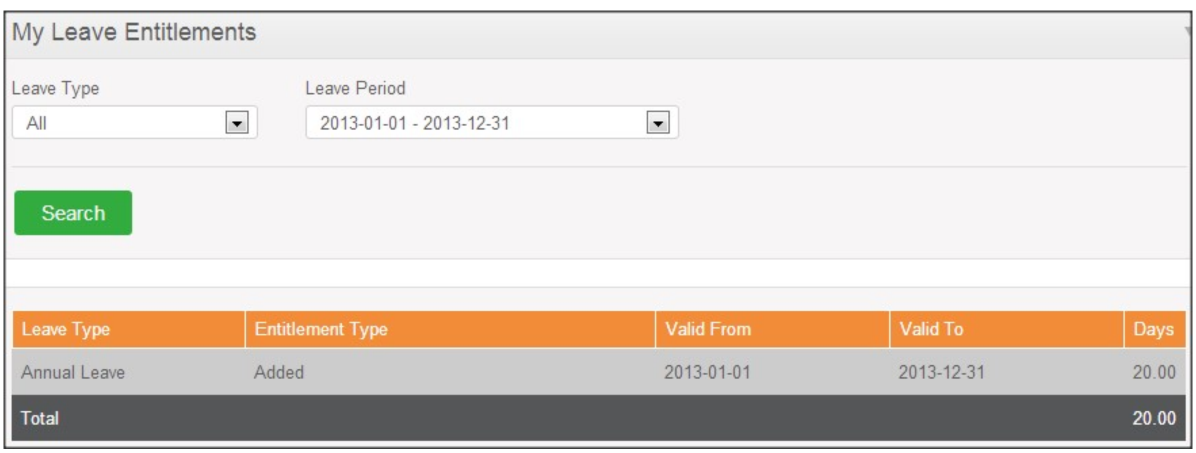


Figure 3.7: ESS User - My Entitlements

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 - 2013-12-3

2013-01-01 - 2013-12-31

2014-01-01 - 2014-12-31

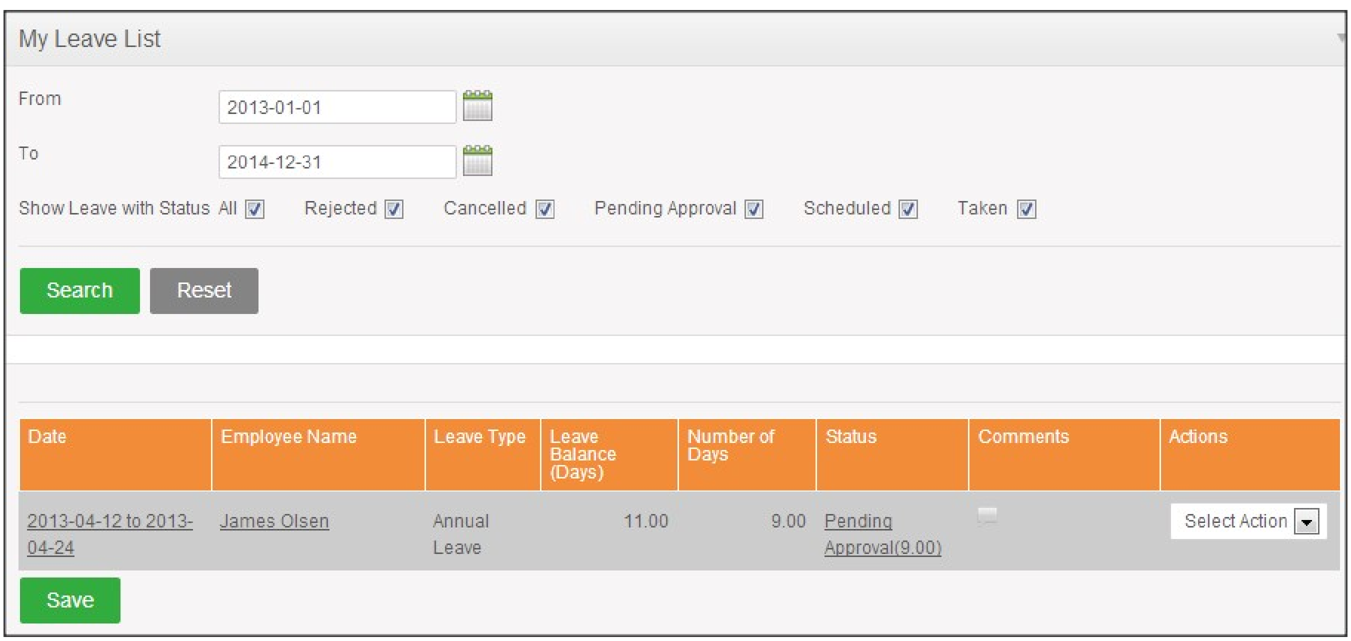
View

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 2013-01-01

To 2014-12-31

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)		Select Action

Save

Figure 3.8: My Leave Details

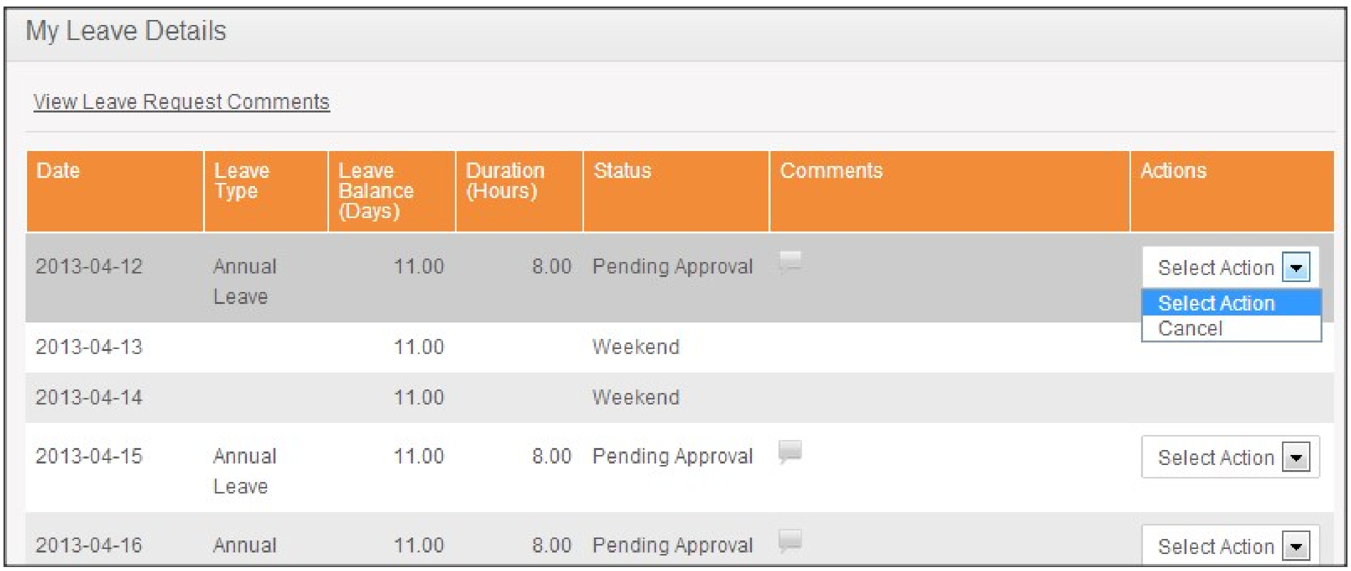
You can view leave using the search toolbar as shown in Figure 4.5 by:

- 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		Select Action (Select Action / Cancel)
2013-04-13		11.00		Weekend		
2013-04-14		11.00		Weekend		
2013-04-15	Annual Leave	11.00	8.00	Pending Approval		Select Action
2013-04-16	Annual	11.00	8.00	Pending Approval		Select Action

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.

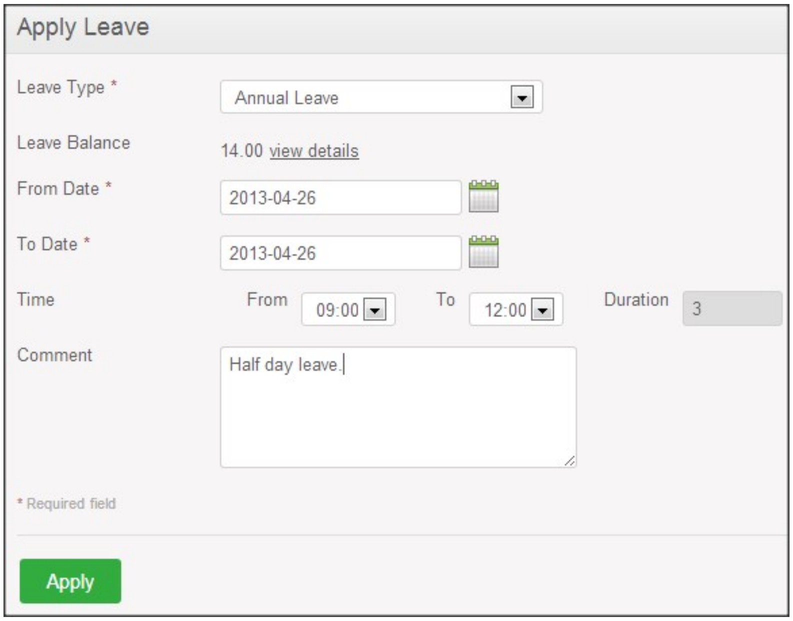
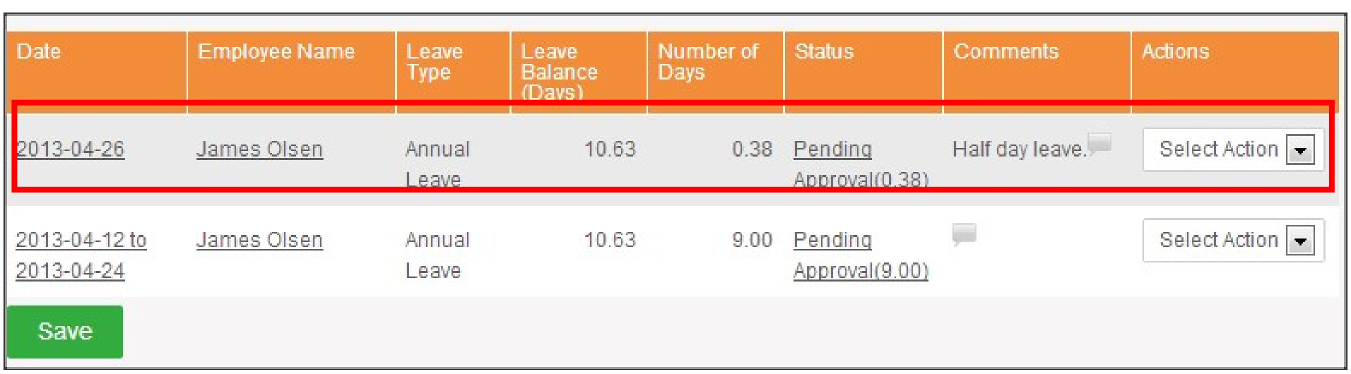


Figure 4.0: Apply for Leave

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 may 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.	Select Action
2013-04-12 to 2013-04-24	James Olsen	Annual Leave	10.63	9.00	Pending Approval(9.00)		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.

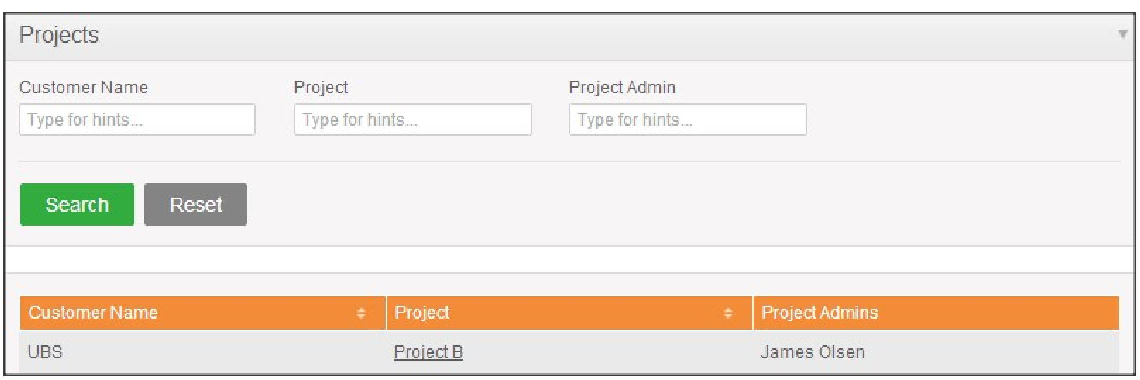


Figure 4.2: Projects

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.

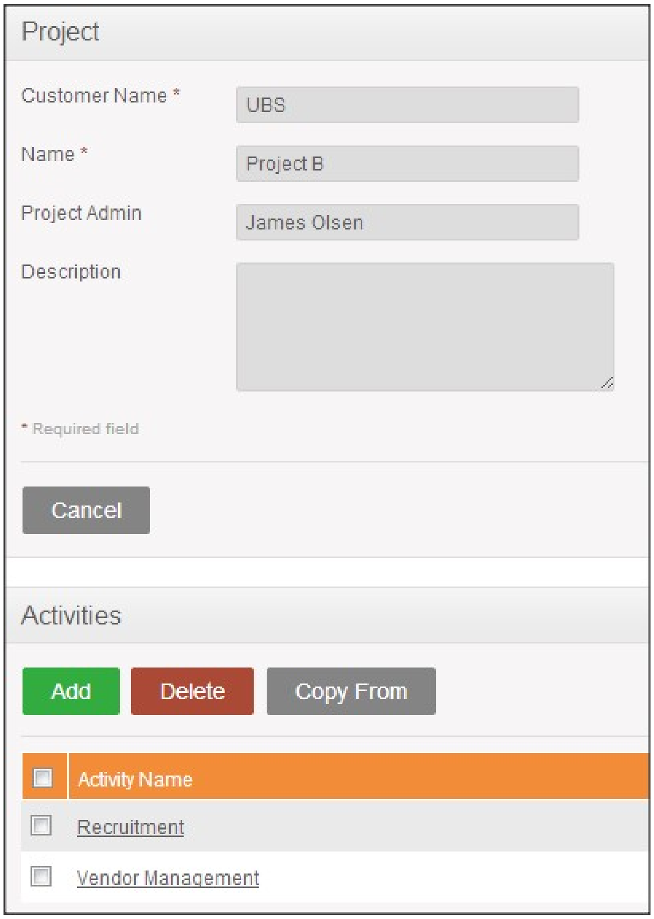


Figure 4.3: Project Details

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.

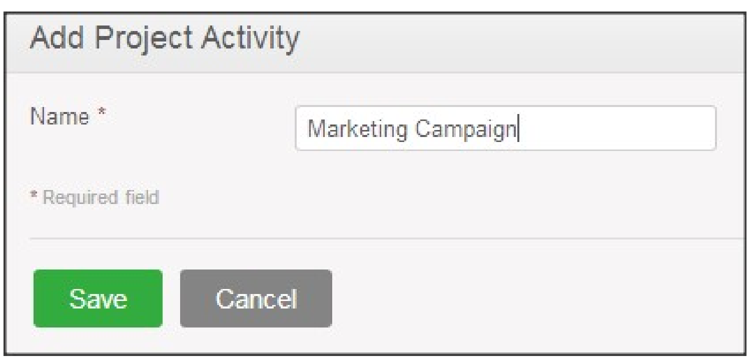


Figure 4.4: Add Project Activity

To edit a project activity, click on the relevant project activity and the screen as shown in Figure 4.5 will appear.

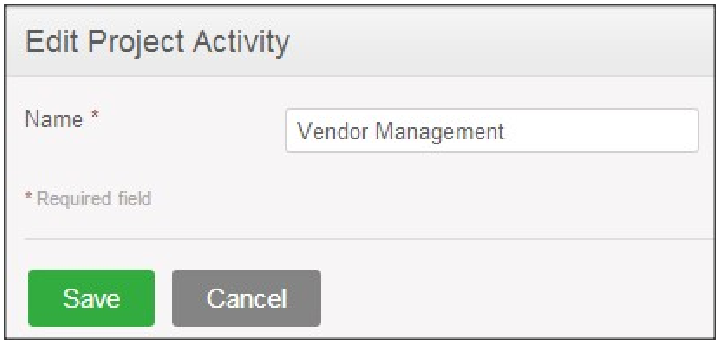


Figure 4.5: Edit Project

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".

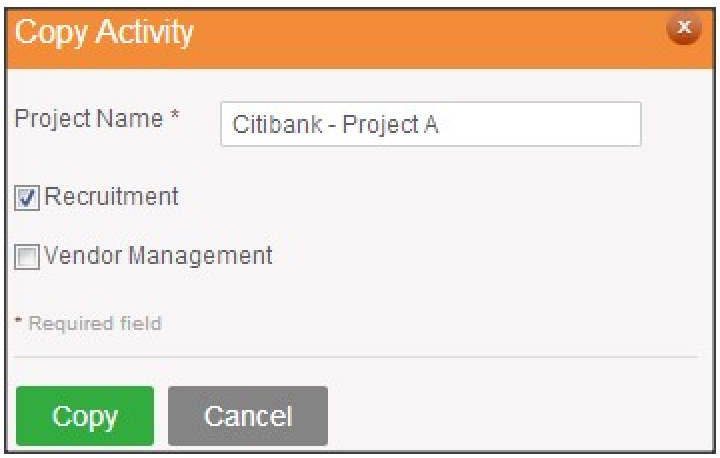


Figure 4.6: Copy Activity

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.

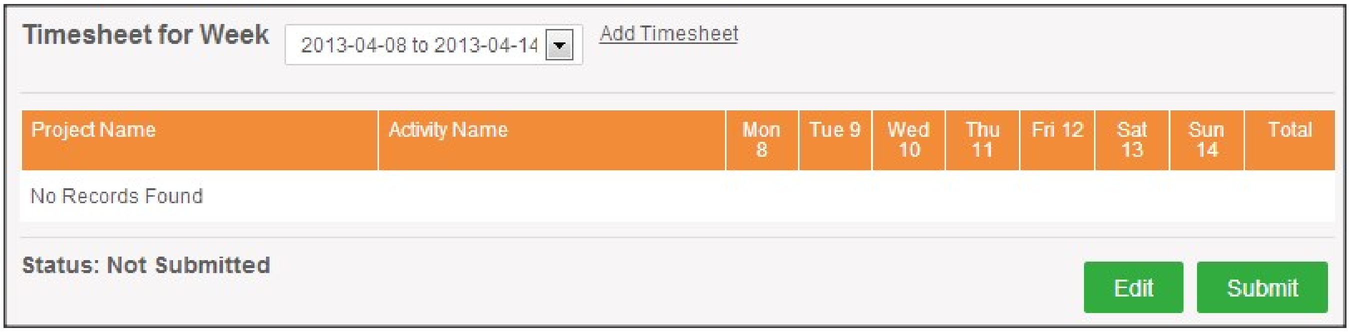


Figure 4.7: Enter Timesheet

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.

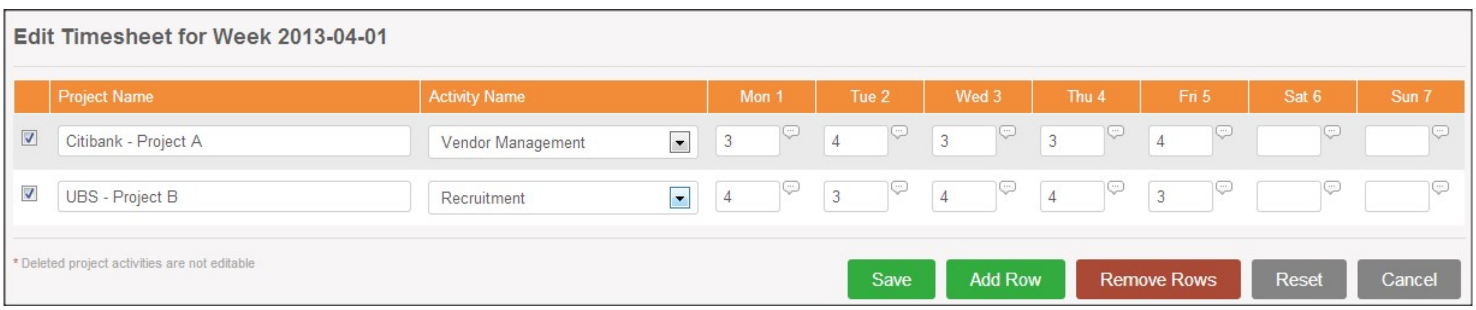


Figure 4.8: Edit Timesheet

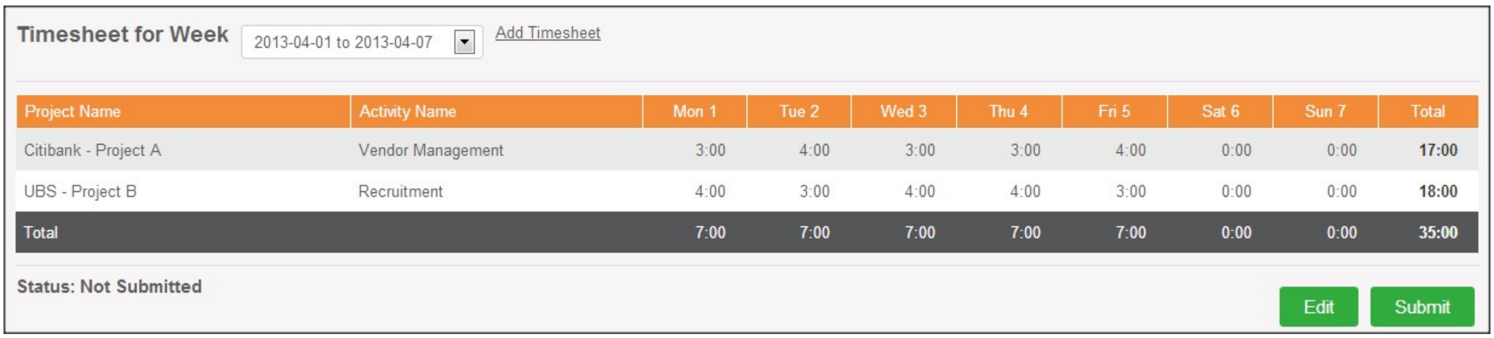
The following options are available when editing the timesheet:

- **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 Add Timesheet

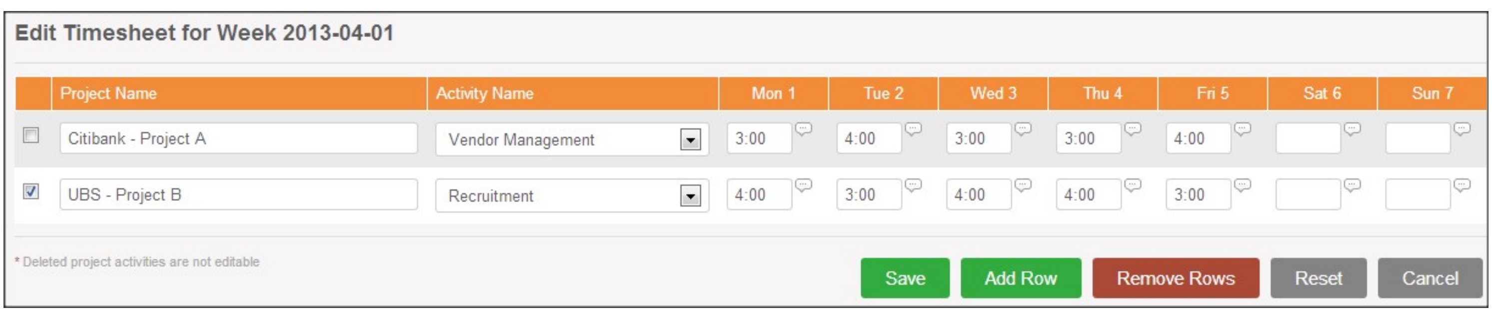
Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Total
Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00	0:00	0:00	**17:00**
UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00	0:00	0:00	**18:00**
Total		7:00	7:00	7:00	7:00	7:00	0:00	0:00	35:00

Status: Not Submitted

Edit Submit

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
☐	Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00		
☑	UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00		

* Deleted project activities are not editable

Save Add Row Remove Rows Reset Cancel

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.

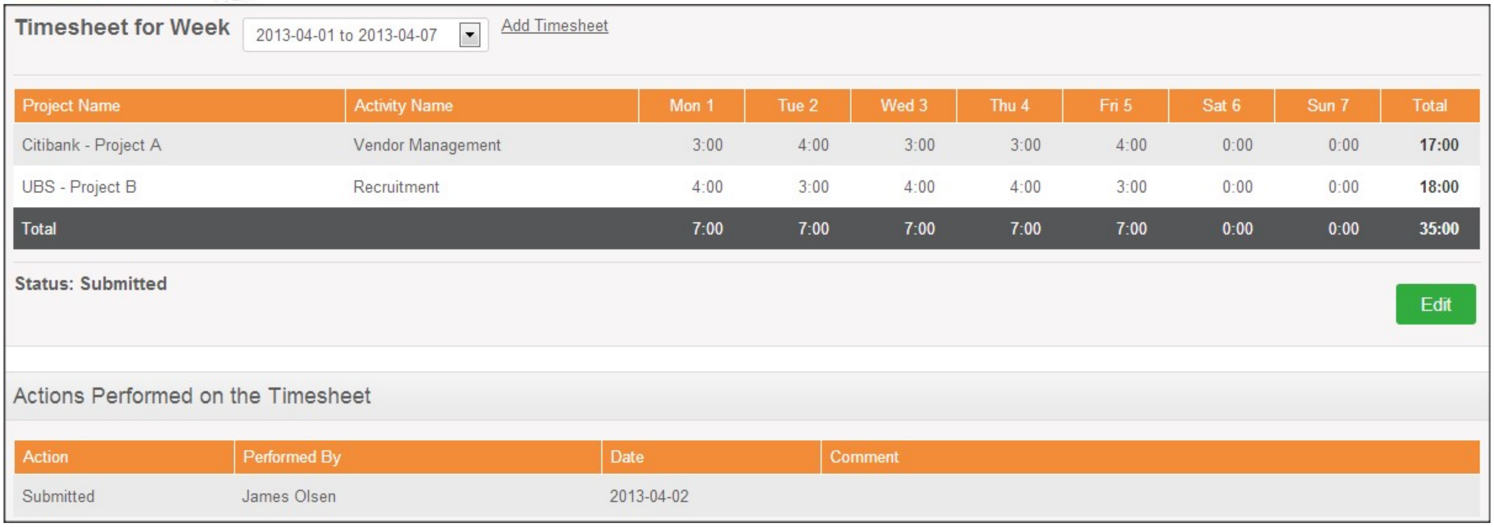


Figure 5.1: Submit Timesheet

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.

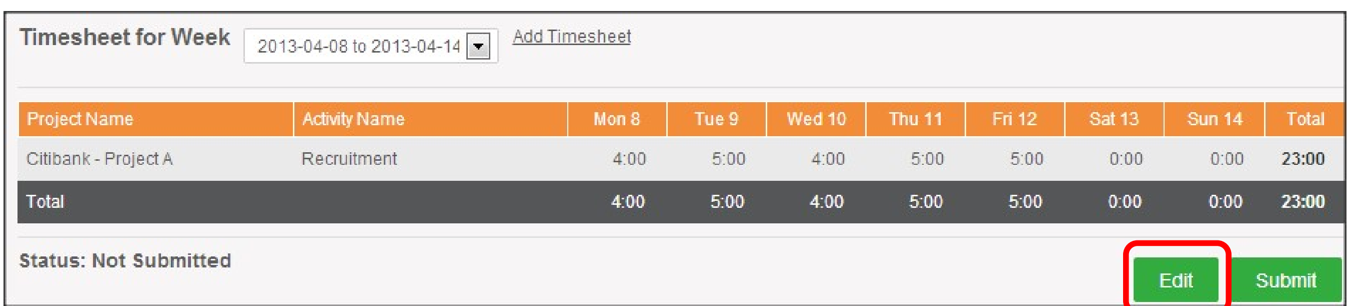


Figure 5.2: Edit Timesheet

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.

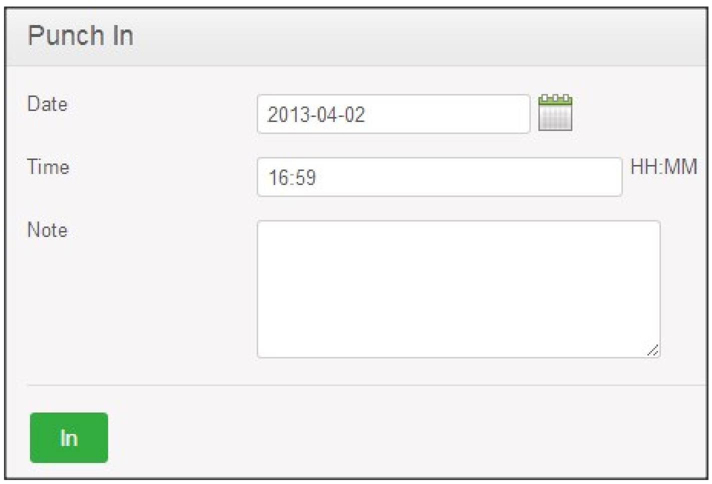


Figure 5.3: Punch In

*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”.

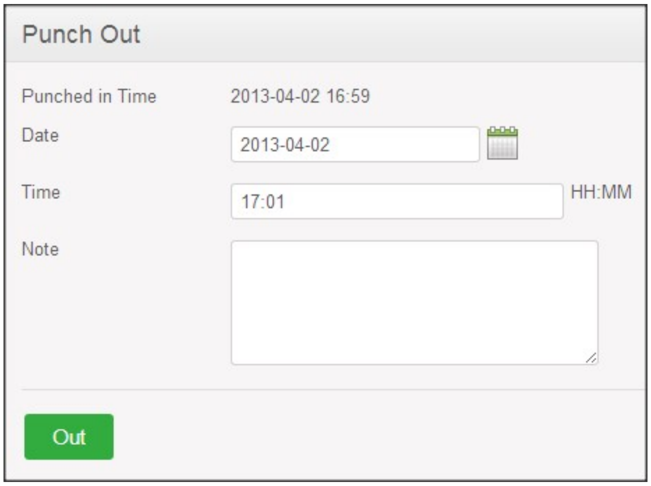


Figure 5.4: Punch Out

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.

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.

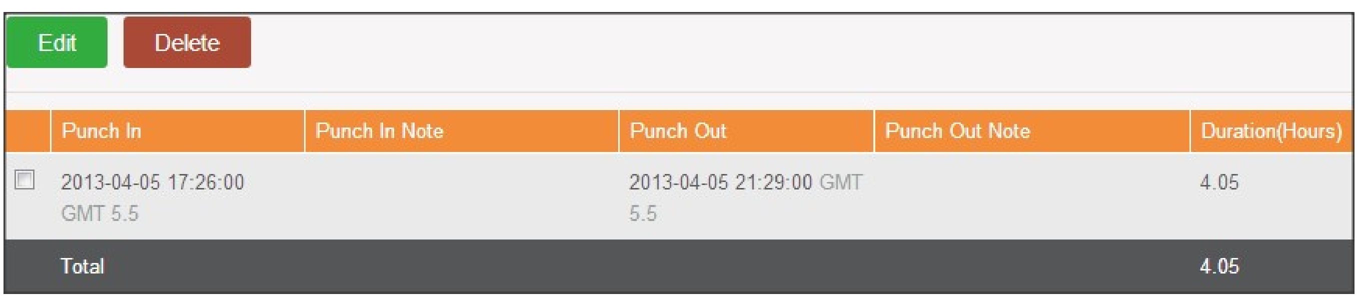


Figure 5.6: "My Records" in Detail

*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.

☐	Employee	Job Title	Review Period	Due Date	Status	Reviewer
☐	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.