Administrator's User Manual for

OrangeHRM OS v 4.3

Contents

1.0 Audience

This document is intended as a complete guide for using OrangeHRM 4.3. 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 Supported Environment

2.1 Minimum Hardware Requirements

- Processor - Intel x86 Architecture 3GHz processor or equivalent
- RAM - 2 GB RAM
- Hard Disk - 40GB

*Note: **This configuration will support up to 100 users. If you have more users, this configuration may not be sufficient. Please contact support@orangehrm.com to get the optimized hardware requirements.**

2.2 Software Requirements

- Operating System - Windows XP, Windows 7, Windows Server 2003, Windows Server 2008, Linux distributions such as Ubuntu, Fedora, Redhat.
- Apache Version - Apache 2.2
- MySQL Version - 5.1.36
- PHP Version - 5.3.5, 5.2.10-2Ubuntu6.4
- Browser - Internet Explorer 8, Firefox, Google Chrome, Safari
  *Note: JavaScript should be enabled in all the browsers

- Web Server Packages - XAMPP, WAMPP , LAMPP

*Note: **If PHP, MySQL & Apache are manually configured, web server packages are not required.**

3.0 Installing OrangeHRM

Step 1: Install the environment for OrangeHRM

Install the environment for OrangeHRM (Apache, MySQL and PHP) using XAMPP/WAMPP.
Download XAMPP for Windows at, http://www.apachefriends.org/en/xampp-windows.html

OR

Download WAMPP (recommended version - 2.0 and above) for Windows at http://www.wampserver.com/en/download.php.

*Note: Alternatively you may download orangehrm one self-extracting installer for windows. This package automatically installs Apache, MySQL and PHP utilities which are required to run OrangeHRM.

Step 2: Download OrangeHRM

Please visit: http://www.orangehrm.com/download.php to download OrangeHRM Self-extracting Installer.

Provided that both Apache and MySQL are running, you can access OrangeHRM via your web browser.

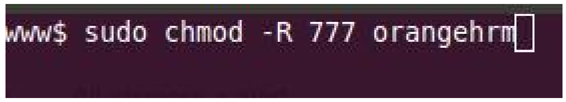
Step 3: Installation Process

Once the download is complete, go to the destination folder where OrangeHRM was downloaded in your PC.

Copy the OrangeHRM folder & paste the OrangeHRM folder in the **htdocs** folder *(**My Computer>>Local Disk (*)>>xampp>>htdocs**)*.

If you have installed **WAMPP**, paste the OrangeHRM folder in the ***www*** folder.

*Note: If you are a **Linux** user, first change the file permission of OrangeHRM.
Open the terminal (console) and navigate to your orangehrm directory (which is in the www folder or htdocs folder) and run the below command: ***sudo chmod -R 777 <orangehrm>***

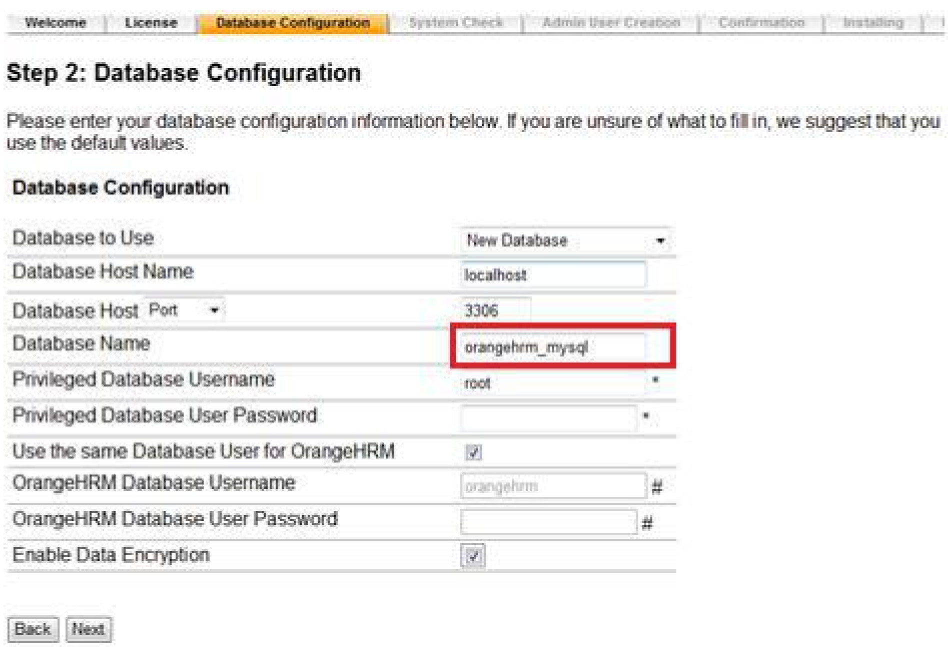


Copy and paste the name of the OrangeHRM version that you have downloaded in the following URL: [***http://localhost/orangehrm***](http://localhost/orangehrm)

OR

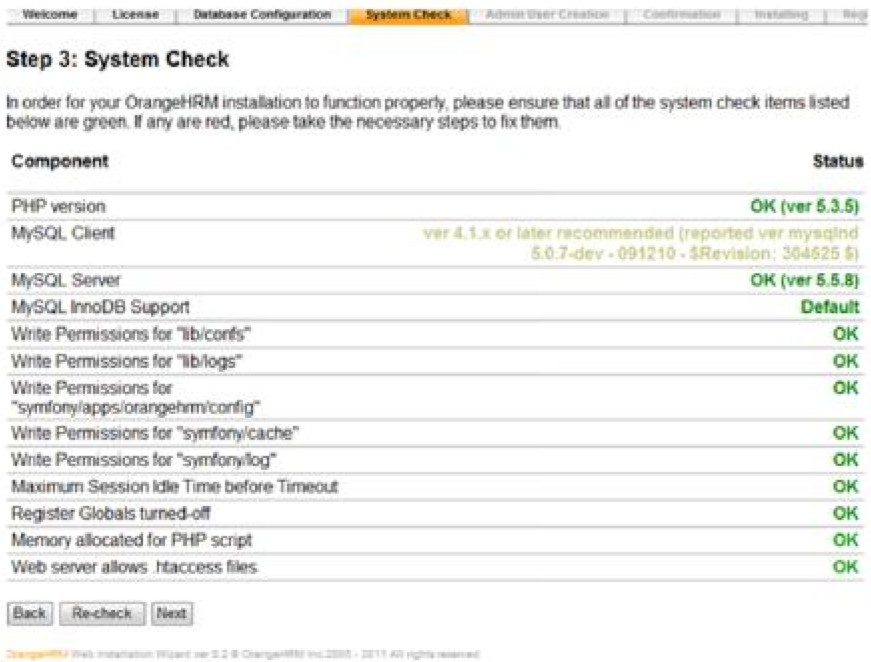
Type the IP address of your PC instead of the localhost.
Click "**Next**" to begin the OrangeHRM installation.
Step 4: Click "**I accept**" to agree and proceed with the installation.

Configure your database by entering a preferred Database Host Name. (All the data that is populated into the system later will be stored under this Database Host Name).



Select the two checkboxes based on your requirements. Click "**Next**" to proceed.

The System will check for minimum system requirements to install OrangeHRM in your PC.
Once the system check is complete, click **"Next".**



You can create an administrator account to login to the system by entering the preferred Username and Password.

Once the installation is complete, click **"Next".**

Once you have successfully installed OrangeHRM, register yourself to receive additional support and services from OrangeHRM.

Step 3: Login to the OrangeHRM System

Login to the OrangeHRM system by using the Administrator account that you created during the installation process.

Please note:

It is understood that if you intend for your employees to login to the OrangeHRM system, the system will need to be installed on either your:

- **company server connected to a LAN network**
- **or a computer that is accessible via the web via a public IP.**

The IP/URL can then be shared with your employees, along with their login credentials.

4.0 The System

Log-in to the OrangeHRM System using the Administrator account that you created.

Figure 4.1: Login Panel

5.0 Admin Module

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.

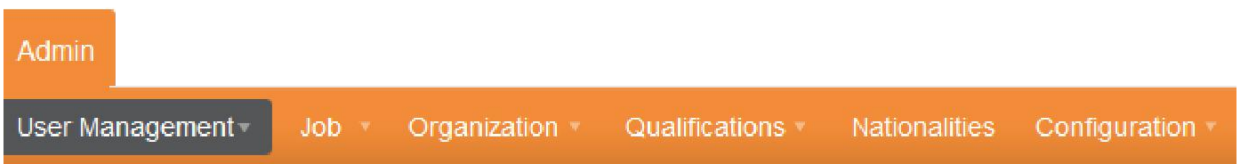


Figure 5.1: Admin Module

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.

5.1 User Management

This feature allows the HR Admin to administer users by creating logins and defining privileges by assigning User Types (Admin or ESS).

To add a system user, go to **Admin>> User Management>> Users** and click "Add", a screen as shown in Figure 1.2 would appear.

Click "Save" once the fields are added.

***Note**: An employee list needs to be created first under the PIM Module to create user logins. Alternatively, a user login could be created when adding employees under the PIM Module *(refer to Chapter 6.3.)*

To create a user login the following needs to be entered:

- **User Role**: You can assign user roles for each user whether they would fall under as an "Admin" or "ESS" user type to define their user rights.
    - **Admin:** have access full access to the system.
    - **ESS:** limited access to the system. It could be an ESS-Supervisor or ESS-Employee.
        1. **ESS-Supervisor**: where the user has access to his/her particulars and his/her subordinates' particulars.
        2. **ESS-Employee**: where the user has access only to his/her particulars.

- **Employee Name**
  *If an HR Admin is an existing employee, he/she needs to be defined in the PIM Module
- **Username**
- **Status –** Enabled or disabled
- **Password**
- **Confirm Password** (Re-enter the password)

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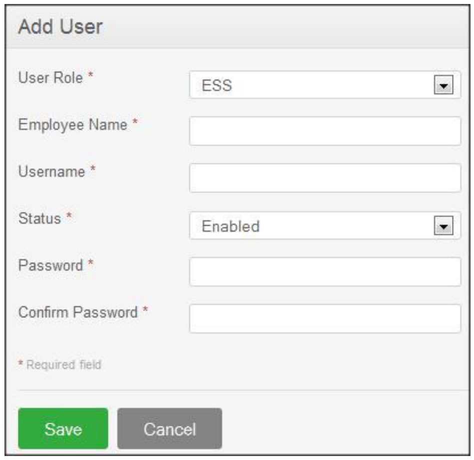

Figure 5.2: Add User

A list of user logins as shown in Figure 5.3 would appear once an entry is added. You may also add multiple entries of user logins. The default system user available will be Admin and has full access to the system.

***Note:** System User Logins need to be communicated manually to employees.

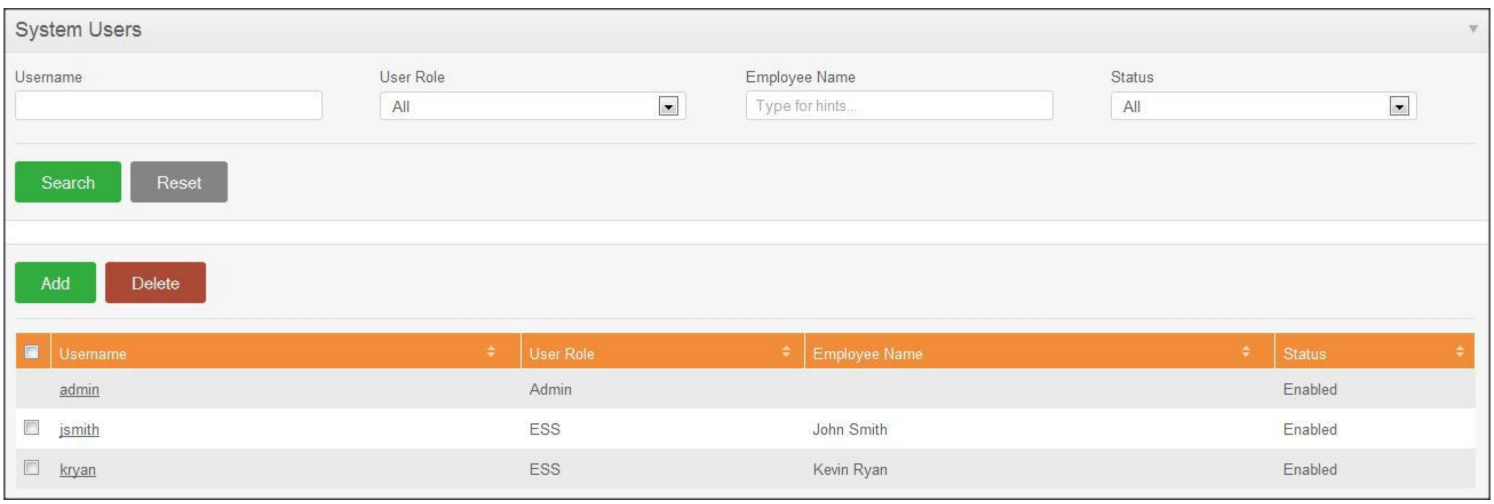

Figure 5.3: System Users List

To delete a system user, click on the check box next to the “Username”. 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 Job

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

- Job Titles
- Pay Grades

- Employment Status
- Job Categories
- Work Shifts

Job Titles

The job titles specific to the company can be defined in this option. To add an entry, go to **Admin>> Job>> Job Titles** and click “Add”. A screen as shown in Figure 5.4 would appear.

Click “Save” once the fields are added.

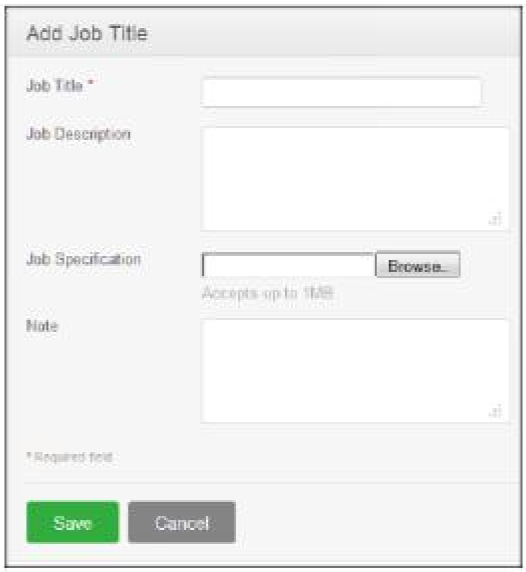

Figure 5.4: Add Job User

A list of job title(s) will appear as shown in Figure 5.5. You may also enter multiple job titles. You may view Job Title details by clicking on the name of the “Job Title”.

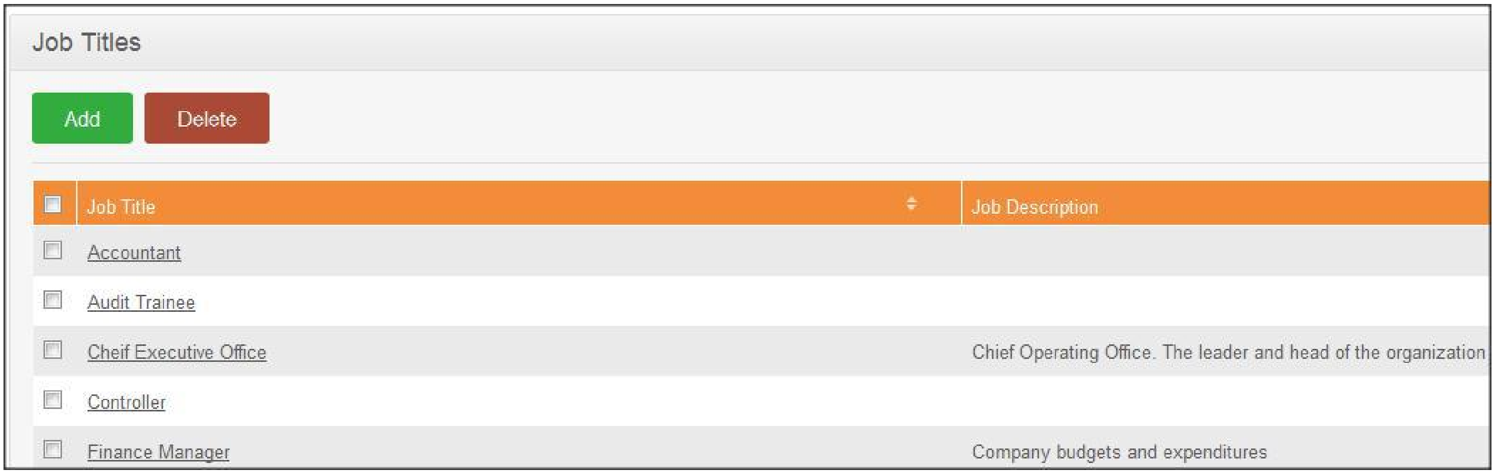

Figure 5.5: Job Title List

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 5.6 would appear.

Click “Save” once the field is added.

Figure 5.6: 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.

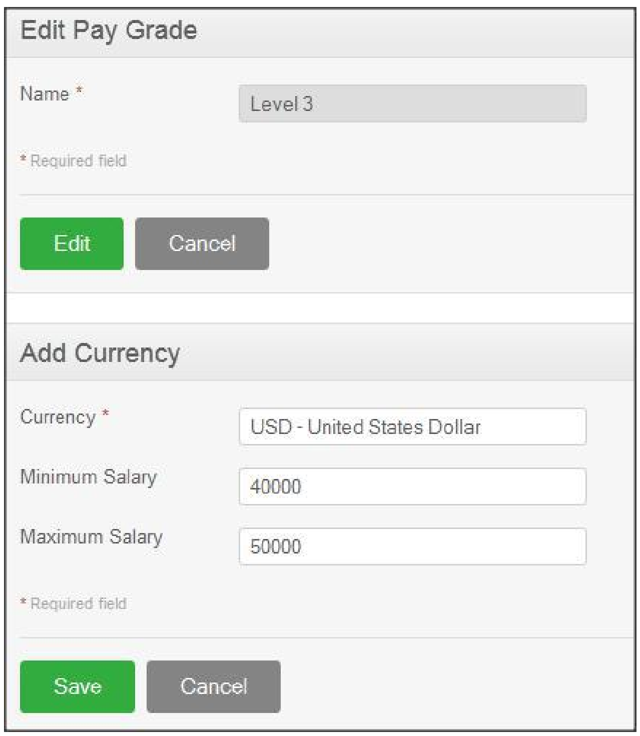

Figure 5.7: Assign Pay Grade

You can assign multiple currencies here and each currency defined will be listed as shown in Figure 5.8.

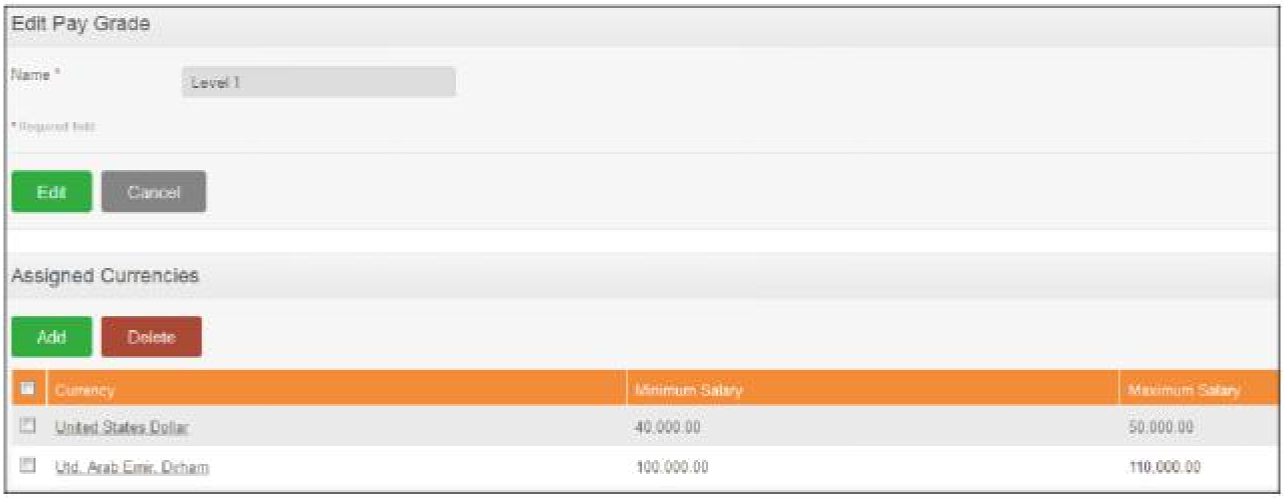

Figure 5.8: Pay Grade- Currency List

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 5.9. To view Pay Grade details click on “Pay Grade name.

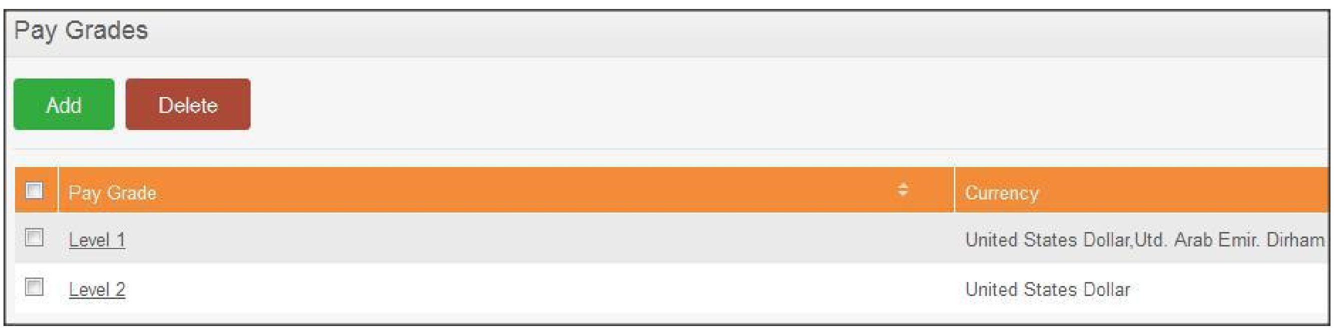

Figure 5.9: Pay Grades List

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 5.10 would appear.

Click “Save” once the field is added.

Figure 5.10: 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.

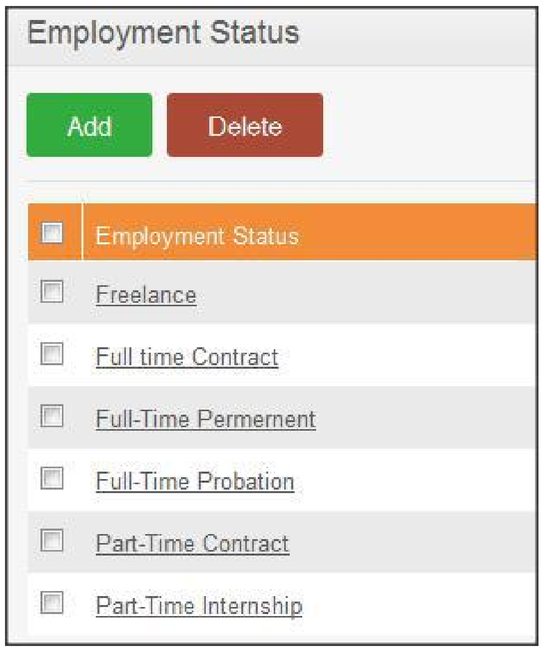

Figure 5.11: Employment Status List

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.

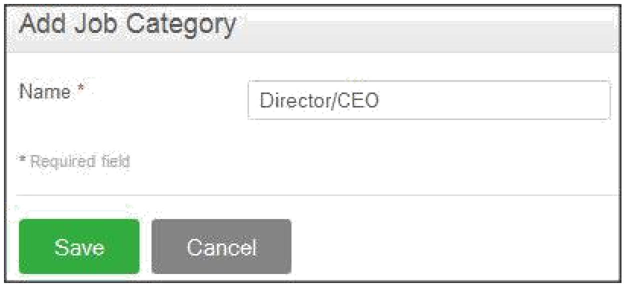

Figure 5.12: Add Job Category

A list of Job Category as shown in Figure 5.13 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.

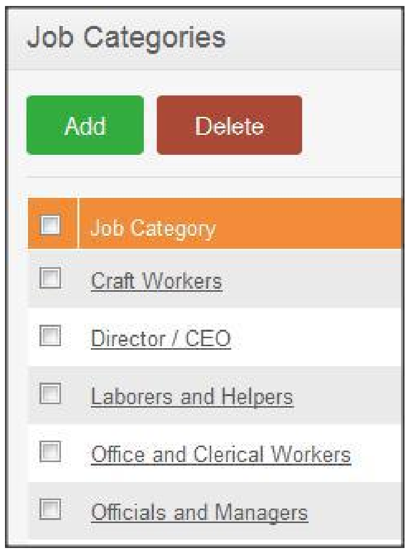

Figure 5.13: Job Category List

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 5.14 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. Also you may specify the work day start time and end time for a particular work shift.

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

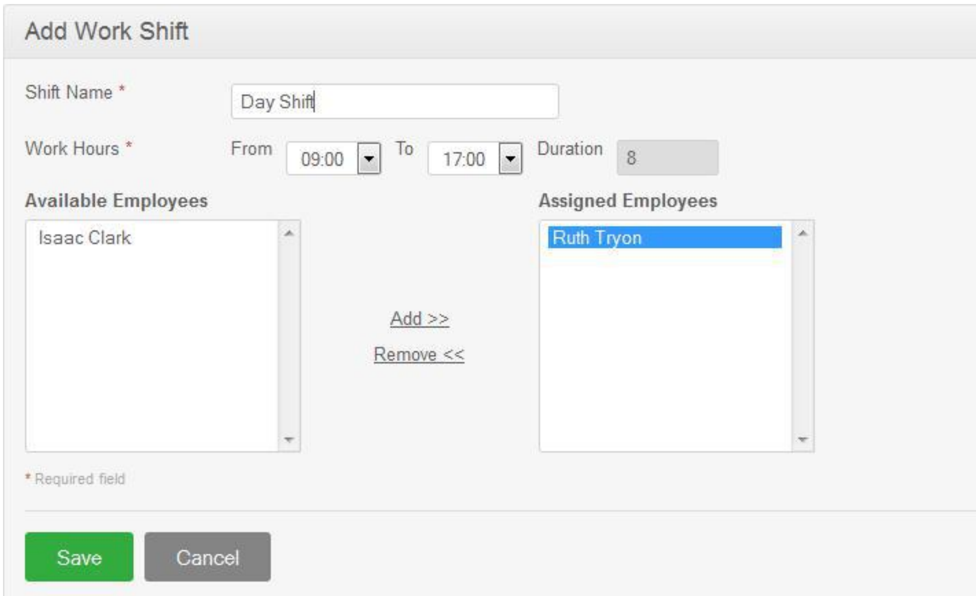

Figure 5.14: Add Work Shift

A list of work shifts as shown in Figure 5.15 would appear once a "Work Shift" is added. To view Work Shift details, click on "Work Shift" name. You may also add multiple entries of work shifts.


Work Shifts

Shift Name	From	To	Hours Per Day
Flexible	09:00	15:00	6.00
Night	09:00	19:00	10.00
Twilight	09:00	18:00	9.00

Figure 5.15: 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".

5.3 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 5.16.

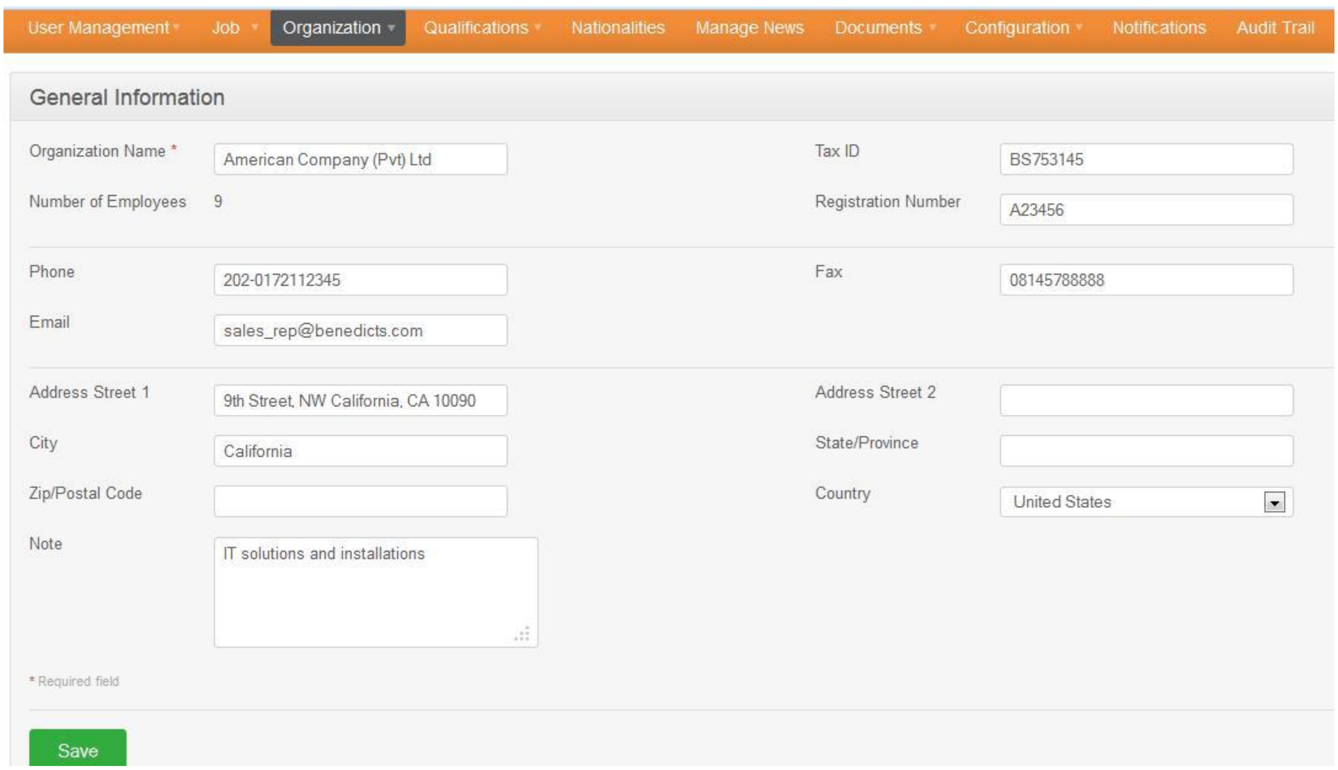

Figure 2.6: General Information

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 5.17 would appear.

Click "Save" once the fields are added.

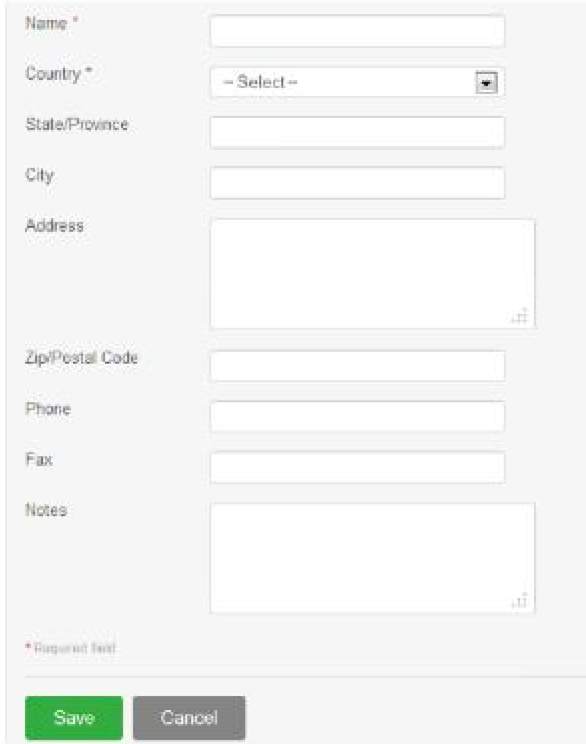

Figure 5.17: Add Location

Once a location is added, it will be listed as shown in Figure 5.18. You may also enter multiple locations. You may view location details by clicking on "Location Name".

Figure 5.18: 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 5.19 and the screen shown in Figure 5.20 would appear.

Figure 5.19: Add Sub-Unit

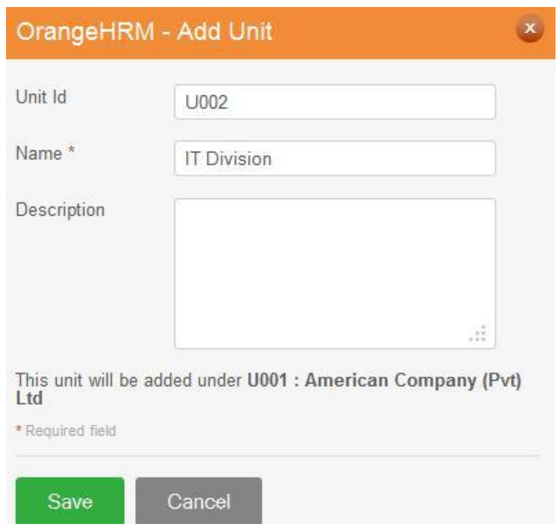

Figure 5.20: Sub-Unit Details

*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 5.21.

Figure 5.21: 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 5.22.

Figure 5.22: 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.

5.4 Qualifications

This feature allows you to define all information with regards to employees' qualifications. The sub-menu consists of:

- Skills
- Education
- Licenses
- Languages

Skills

You can define various sets of skills which can be later used on the PIM Module. To add an entry go to **Admin>> Qualifications>> Skills** and click "Add" and a screen as shown in Figure 5.23 would appear.

Click "Save" once the fields are added.

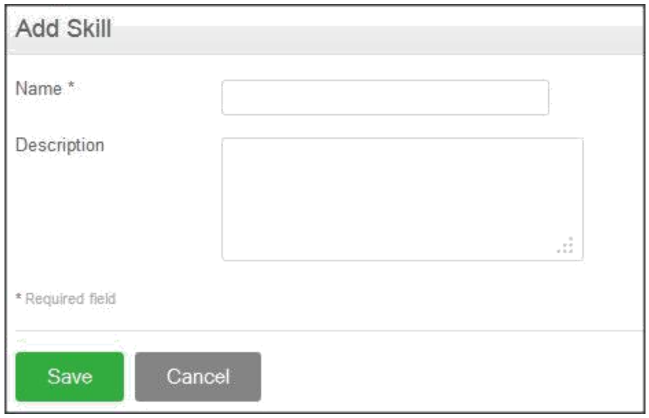

Figure 5.23: Add Skill

A list of skill(s) as shown in Figure 5.24 would appear once a "Skill" is added. You may also add multiple entries of skills.

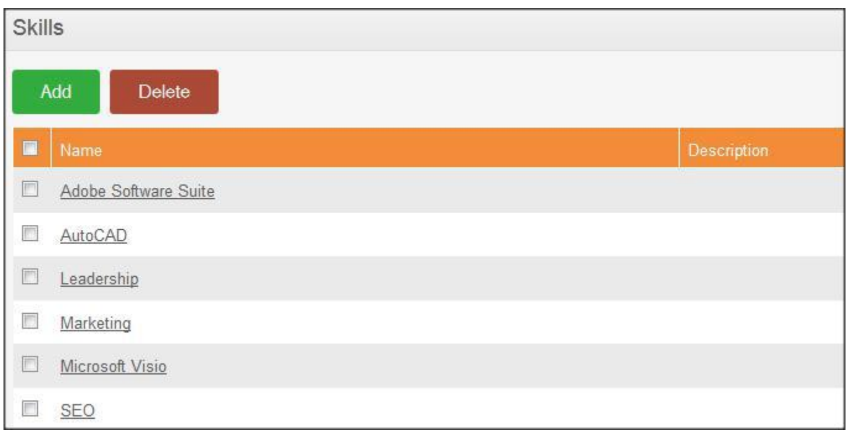

Figure 5.24: Skills List

To delete a skill click on the check box next to the "skill" 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".

Education

You can define various types of educational qualifications which can be later used in the PIM Module. To add an entry select **Admin>> Qualifications>> Education** and click "Add", a screen as shown in Figure 5.25 would appear.

Click "Save" once the field is added.

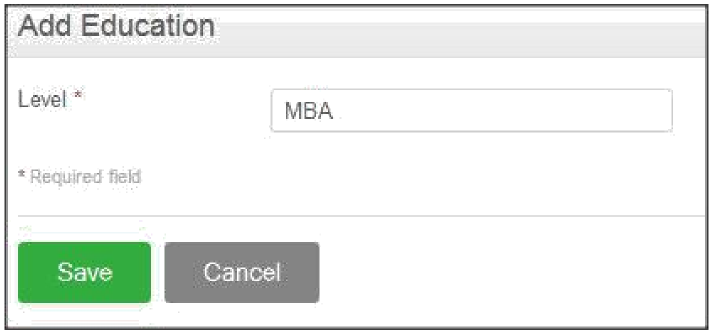

Figure 5.25: Add Education

A list of education as shown in Figure 5.26 would appear once an "Education" entry is added. You may also add multiple entries of skills.

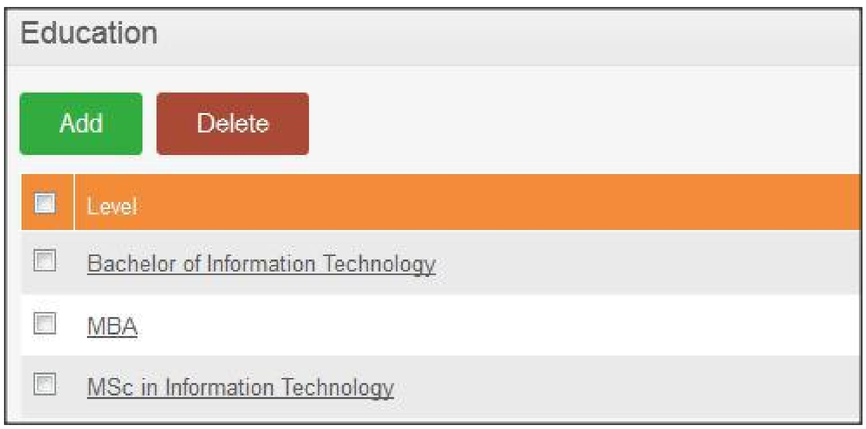

Figure 5.26: Education List

To delete education type click on the check box next to the "Education" 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".

Licenses

You can define various types of licenses which can be later used in the PIM Module. To add an entry go to **Admin>> Qualifications>> Licenses** and click "Add", a screen as shown in Figure 5.27 would appear.

Click "Save" once the field is added.

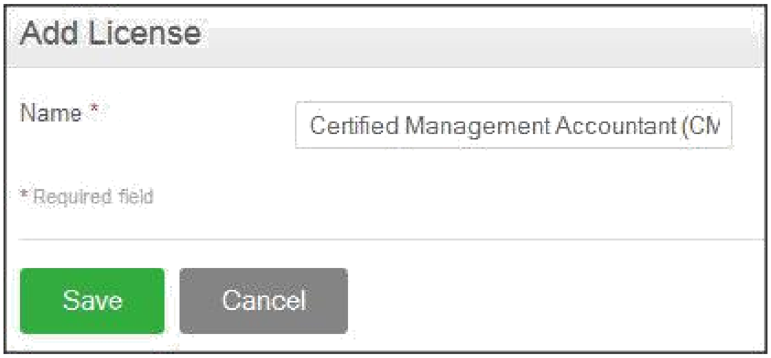

Figure 5.27: Add License Type

A list of license type(s) as shown in Figure 5.28 would appear once a "License" type is added. You may also add multiple entries of licenses.

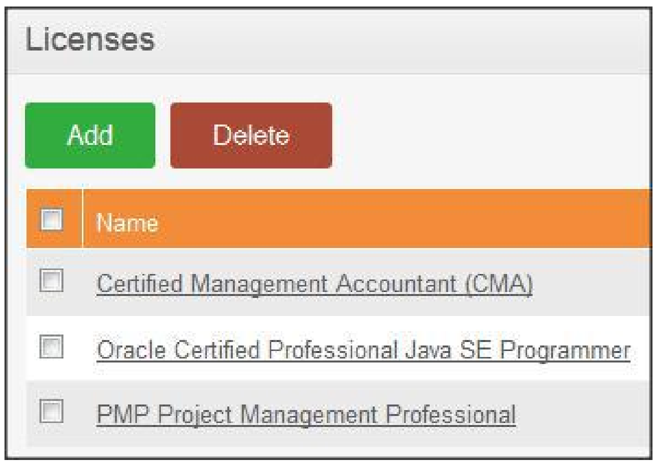

Figure 5.28: Licenses List

To delete a license type click on the check box next to the "License" 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".

Languages

Different types of languages that employees in your company speak can be defined here and can be used in The PIM Module later. To add an entry, go to **Admin>> Qualifications>>Languages** and click "Add", a screen as shown in Figure 5.29 would appear.

Click "Save" once the field is added.

Figure 5.29: Add Language

A list of languages as shown in Figure 5.30 would appear once a “Language” type is added. You may also add multiple entries of languages.

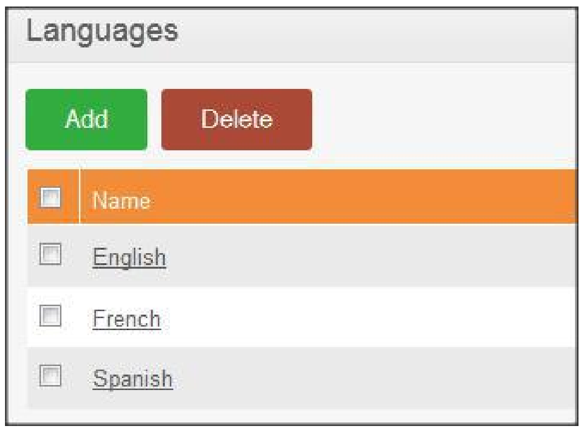

Figure 5.30: Language List

To delete language types click on the check box next to the “Language” 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”.

Memberships

This feature allows the HR Admin to define different membership details of the employees which can be later used in the PIM Module. To add a membership, go to **Admin>> Qualifications>> Membership** and click “Add”, a screen as shown in Figure 5.31 would appear.

Click “Save” once the field is added.

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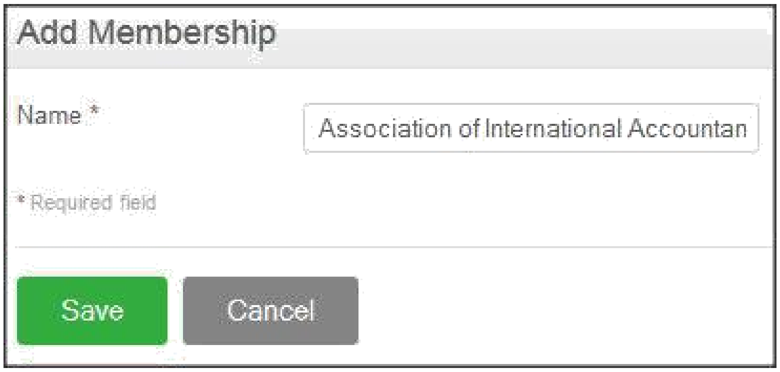


Figure 5.31: Add Membership

A list of membership(s) as shown in Figure 5.32 would appear once a "Membership" is added. To view membership details, click on "Membership" name. You may also add multiple entries of memberships.

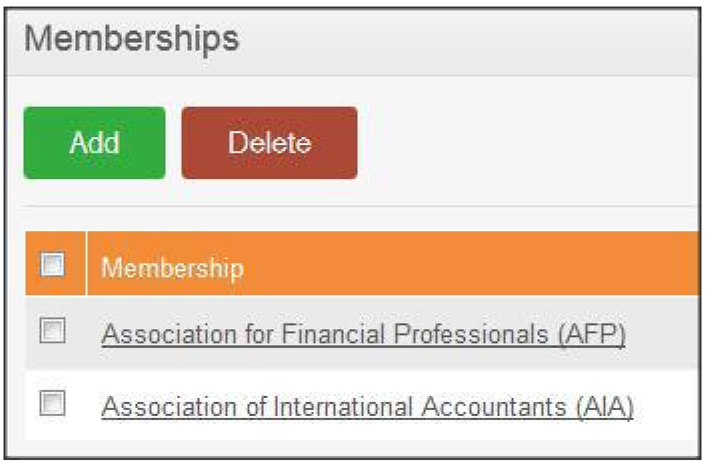


Figure 5.32: Memberships List

To delete a membership, click on the check box next to the "Membership"" 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".

5.5 Nationalities

This feature allows the HR Admin to define the different nationalities that present in the company which can later be used in the PIM Module. Various nationalities are already pre-defined.

To add a nationality, go to **Admin>> Nationalities** and click "Add", a screen as shown in Figure 5.33 would appear.

Click "Save" once the field is added.

Figure 5.33: Add Nationality

A list of nationalities as shown in Figure 5.34 would appear once a "Nationality" is added. You may also add multiple entries of nationalities.

Figure 5.34: Nationalities List

To delete a nationality, click on the check box next to the "Nationality"" 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".

5.6 Configuration

This feature allows you to subscribe and receive notifications and to configure the parameters in setting up the email so notifications will be sent to relevant persons which will quicken the communication processes.

It also allows the HR admin to configure language localization for the entire system, set up a date format and enable/disable module display.

Email Configuration

Configuration of mail settings is essential to accommodate sending and receiving notifications related to the operations performed within the OrangeHRM application *(Ex: leave management).*

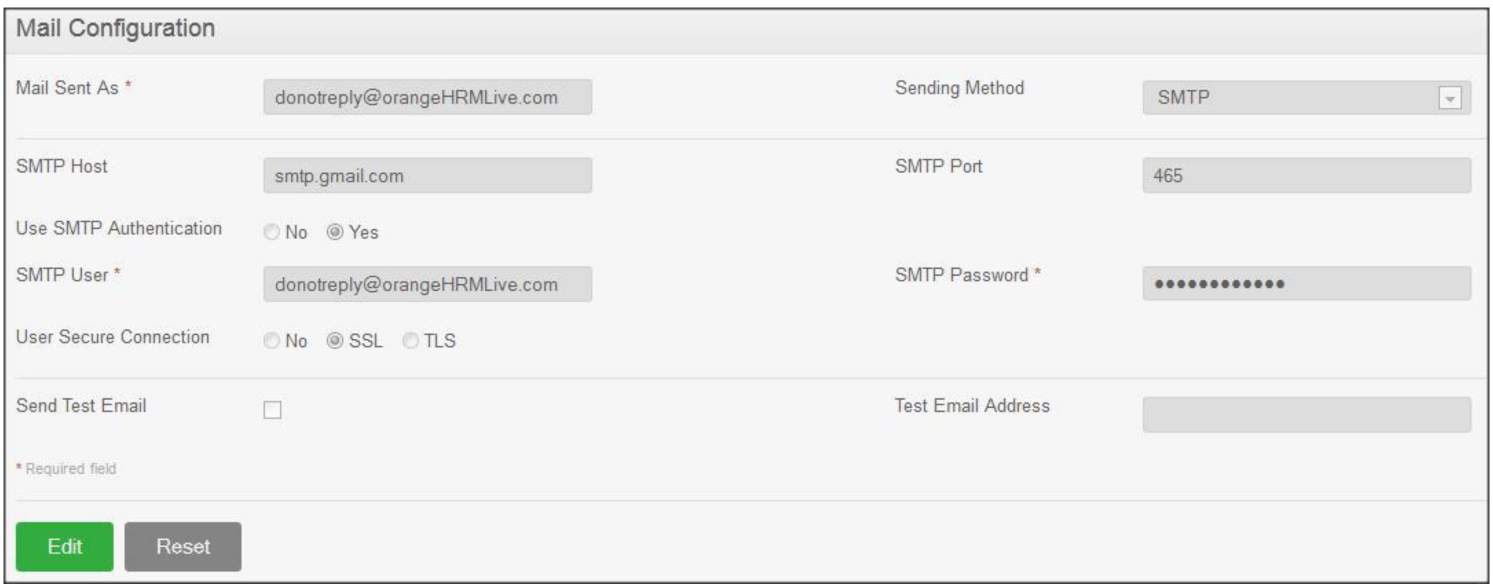


Figure 5.35: Mail Configuration

To configure the mail settings, go to **Admin>> Configuration>>Email Configuration**, a screen as shown in Figure 5.35 would appear. Enter the fields accurately by clicking "Edit", and then a test mail to an email address of your choice could be sent to check functionality. Click "Save" when you have entered all the settings and you may check the email account if you specified an address to receive the test mail.

Email Subscriptions

This feature will allow the admin to subscribe to email notifications that will be sent to the employees and supervisors in the system. A copy of the mail will be sent to the email address specified by the Admin. He/she can also select what copies of notifications he should receive. To subscribe to a notification type, go to **Admin>> Configuration>> Email Subscriptions** and a screen a shown in Figure 5.36 would appear.

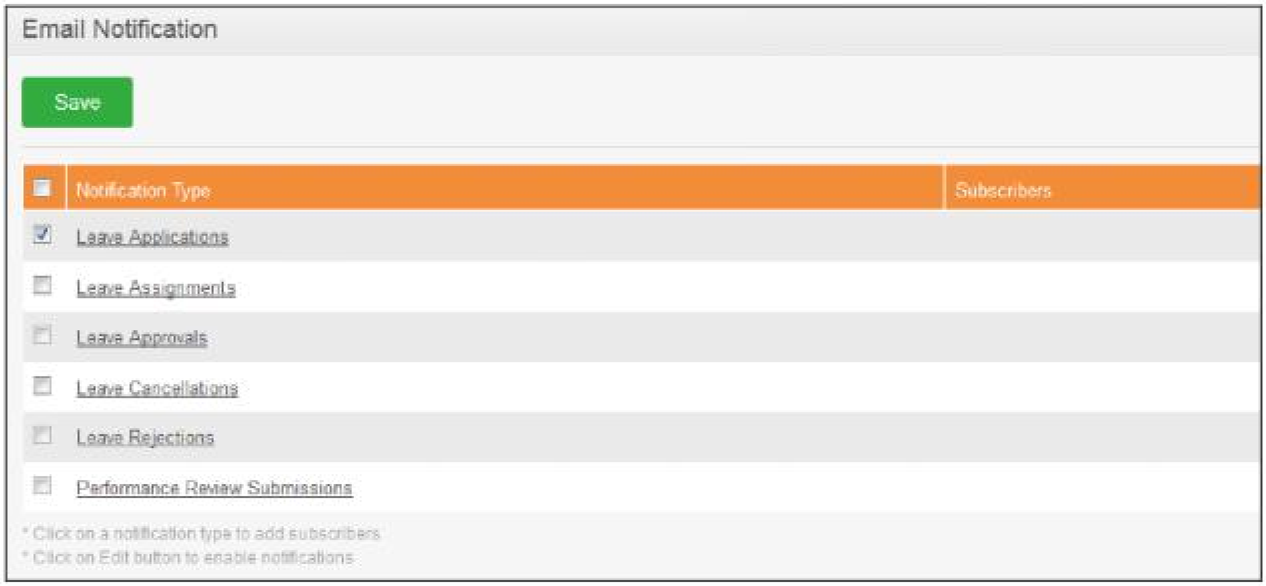


Figure 5.36: HR Admin Notification Subscription

The HR Admin may also add other subscribers to the following notifications by clicking on the notification types and you will be directed to the screen as shown in Figure 5.37. Once the fields are added, click “Save”.

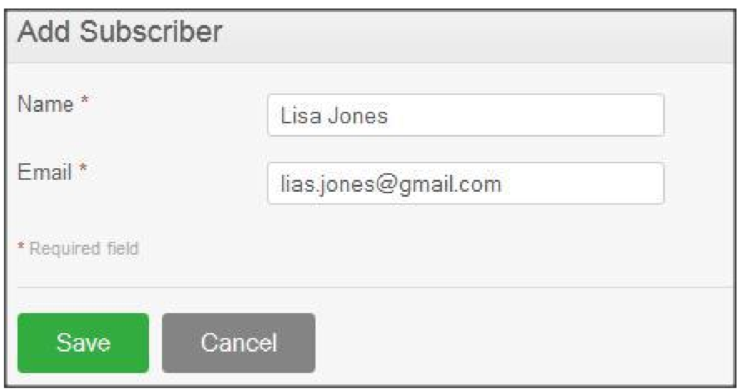


Figure 5.37: Add Subscriber

The entry will then be listed as shown in Figure 5.38 and multiple entries of subscribers for a particular notification type may also be added or deleted.

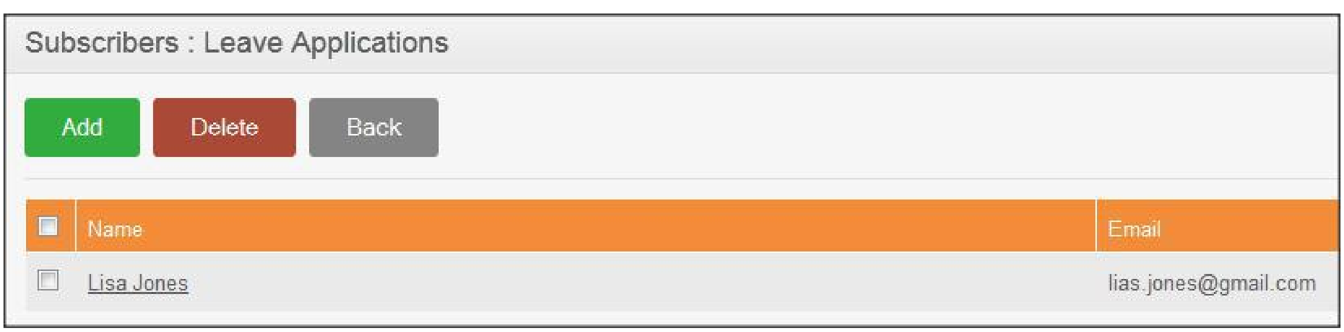


Figure 5.38: Subscriber List for a Notification Type

When you click “Back” you will be directed to the “Email Notification” screen as shown in Figure 5.39 with the added notification subscriber reflected on the screen.

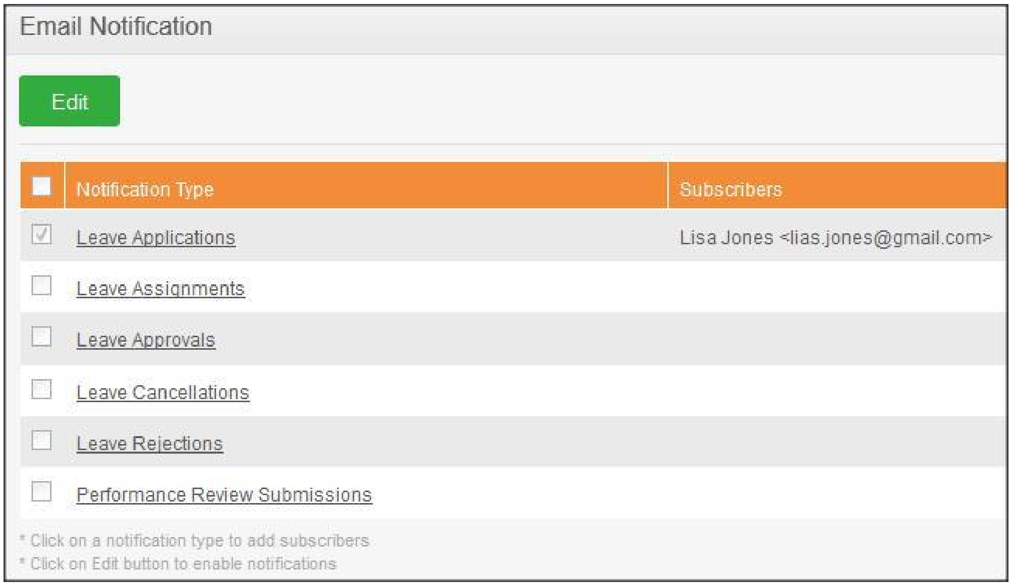


Figure 5.39: Email Notification List of Subscribers

Localization

Language Localization

This feature enables the HR Admin to configure the language settings and translate the OrangeHRM system to the language of your choice. To configure localization settings, go to **Admin>> Configuration>> Localization** and the screen as shown in Figure 5.40 would appear. Click “Edit” to edit the fields.

The default language of the system is US English however you may also use an already set up browser language to translate the system to the language of choice. For example: If you are using Firefox as your browser and it’s translated in UK English language and you want to use this particular language, click on the “Use Browser Language if set” and select from the “Supported Language” provided.

Figure 5.40: Localization

The language pack tool can also be obtained from the website by clicking on "Language and font help" as shown in Figure 5.0, where you will be diverted to the web page or by simply browsing through the OrangeHRM Website (www.orangehrm.com >> Community>> Translators).

Date Format Localization

This feature allows the HR Admin to set up the date format that will be reflected throughout the whole system as shown in Figure 5.0.
Once you have configured the localization settings, click "Save".

Modules

This feature enables the HR Admin to configure the display/hide settings of the modules of the system. To configure the module display settings, go to **Admin>> Configuration>> Modules** and the screen as shown in Figure 5.41 will appear.

Click "Edit "to edit module display. You may select from the list the modules you want to be displayed/hidden.

Click "Save" one module configuration is completed.

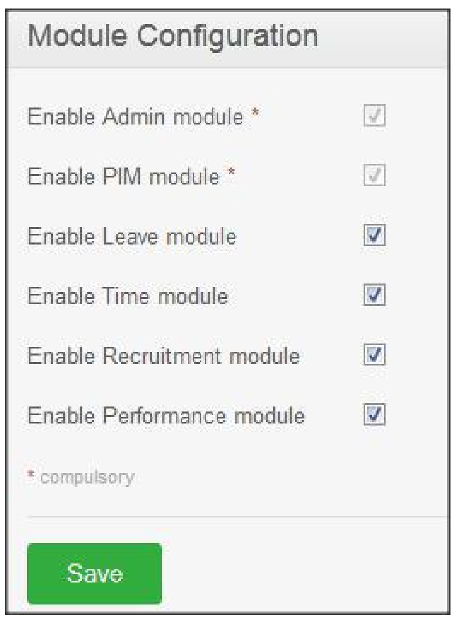


Figure 5.41: Module Configuration

Social Media Authentication

This section allows configuring the OpenID and G+ providers.
Note: Please contact our Managed Services team if you wish to configure any of the following authentication methods.

When clicking on **Admin>> Configuration >> Social Media Authentication,** the screen as shown in Figure 5.42 will appear.

Click "Add" to proceed.

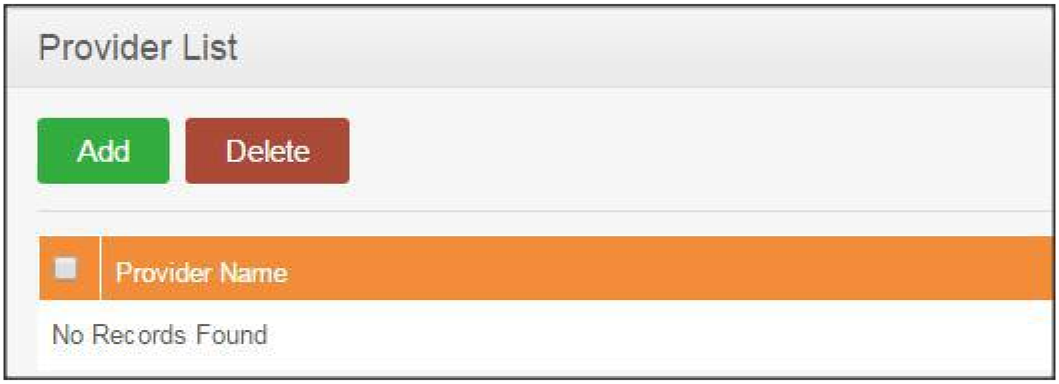


Figure 5.42- Adding Providing List

Open ID –

To add a provider, click on Add. You will then be prompted to enter the Name and URL of your OpenID provider as shown in Figure 5.43. Click on "Save" to save the provider.

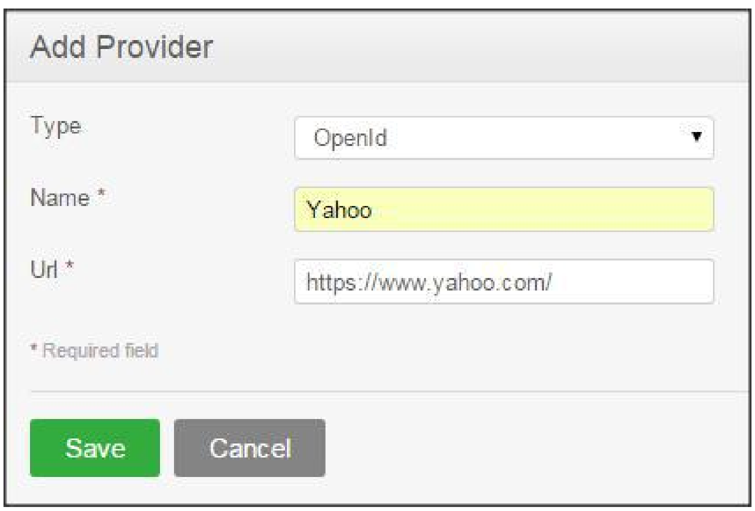


Figure 5.43: Add OpenID Provider

Google Plus -

This section allows configuring the Google + providers. This section should be enabled from the back end. The screen as shown in Figure 5.44 will appear.

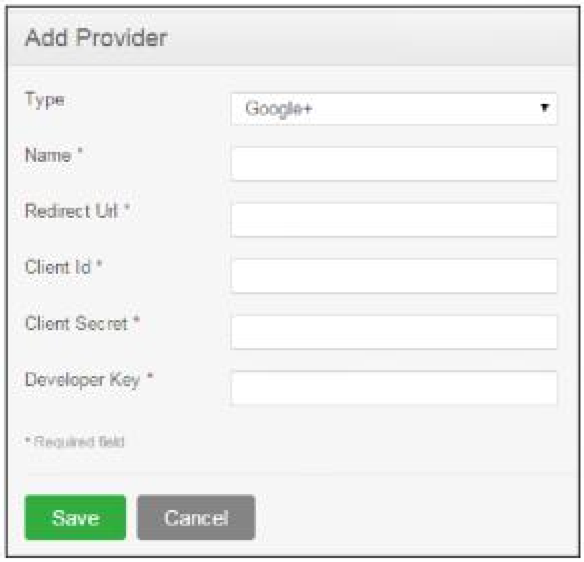


Figure 5.44: Add Google+ Provider

Enter the Name, Redirect URL, Client ID, Client Secret and Developer key of your Google + provider. Click on "Save" to save the provider.

6.0 PIM Module

This core module maintains all relevant employee related information, including different types of personal information, detailed qualifications, work experience, job related information etc. Information captured in this module is utilized by all other modules, thus eliminating data redundancy. Records can be either entered manually one by one or imported from a CSV file. You cannot import all the details but you can edit the remaining fields.

The functionality of the PIM Module differs depending on the rights of the user.

The HR can:

- Configure optional/custom fields, data import from CSV, define reporting methods and termination reasons that will be used throughout the module.
- View all employee details
- Add employee on the list.
- Generate employee report

ESS-Supervisor can:

- View his personal details as well as his/her subordinates.

ESS-Employee:

- Has no access to the PIM module but can view his personal details under the 'My Info' Module.

6.1 Configuration

This allows the HR Admin to add optional fields and custom fields to the module, define various termination reasons, reporting methods and import data from CSV.

Optional Fields

This feature allows the admin to add fields to the "Personal Details" screen that may be specific to the company or country. To configure the "Optional Fields" settings, go to PIM>> Configuration>> Optional Fields and the screen as shown in Figure 6.1 will appear.

Figure 6.1: Optional Fields Configuration

You may click on the checkbox beside the field you want to add and click "Save" once the fields are selected. The field(s) selected will then be reflected under the "Personal Details" screen as shown in Figure 6.2

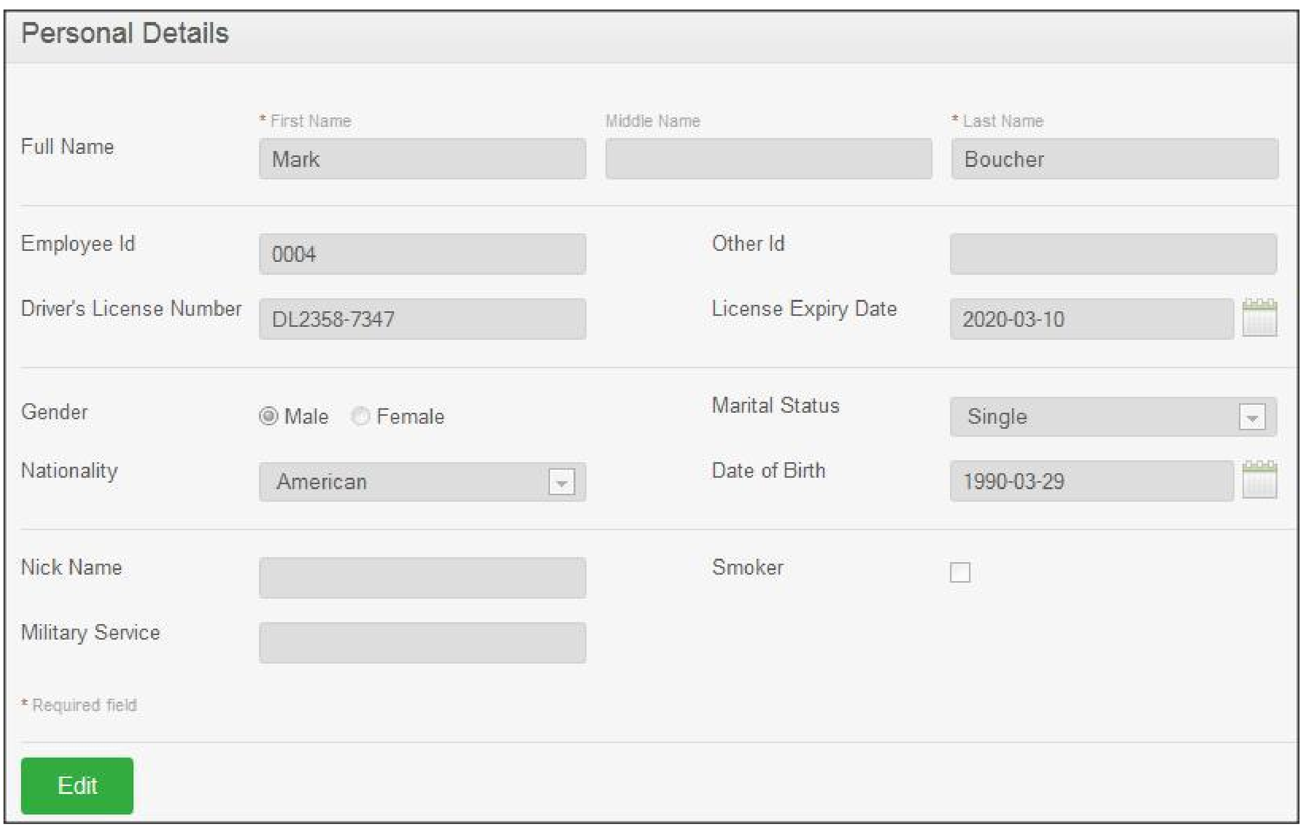


Figure 6.2: Optional Fields added to Personal Details Screen

Custom Fields

This feature allows the Admin to customize and add fields to all the screen of the PIM Module that may be specific and relevant to the company. To add a custom field, go to PIM>>Configuration>>Custom Fields, click "Add" and the screen as shown in Figure 6.3 will appear

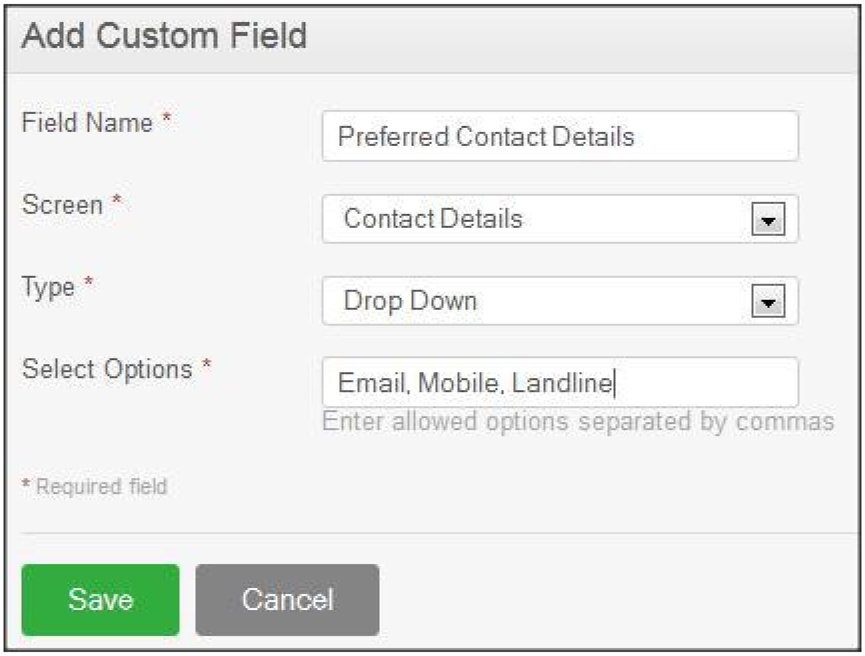


Figure 6.3: Add Custom Field

Define the "Field Name" you want to add, the "Screen" you want the field to appear in, the mode of entering the data whether it's a "Drop Down" selection or "Text or Number" and the if it's a "Drop Down", the options the employees can select from.

Click "Save" once you have entered the details and the fields defined for a particular screen will then be added.

The entry added will then be listed as shown in Figure 6.4. You may add a maximum of 10 fields per screen.

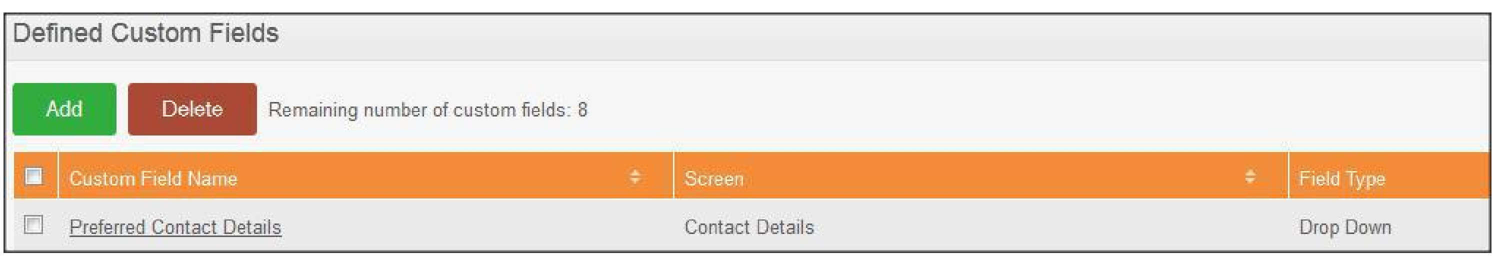


Figure 6.4: Define Custom Fields

You may also add multiple entries of custom fields. To delete a custom field click on the check box next to the Custom Field 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".

Data Import

This feature allows the Admin to import data from a CSV file. To import data, go to PIM>> Configuration>> Data Import and the screen as shown in Figure 6.5 will appear.

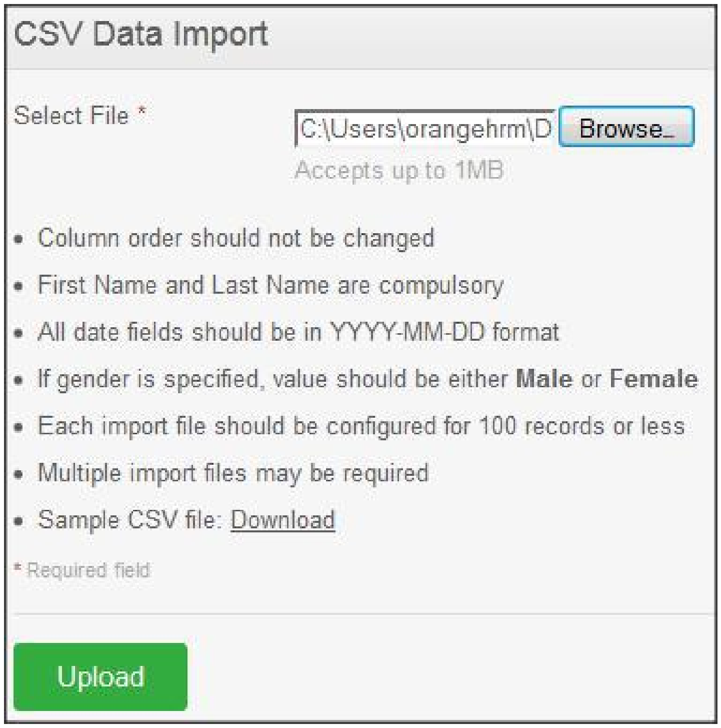


Figure 6.5: CSV Data Import

The following guidelines are stated for a smooth flow of data import:

- Column order should not be changed: the column format of the CSV File should be the same as the "Sample CSV File". Click on Sample CSV File: "Download" to view the column format.
- First Name and Last Name are compulsory
- All data fields should be in YYYY-MM-DD format: if you have configured the date format under "Localization" the date will then be converted from YYYY-MM-DD to the localized date format.
- If gender is specified, value should be either male or female
- Each import should be configured for 100 records or less – maximum of 100 records can be imported.
- Multiple import files may be required: you may carry out multiple imports but maximum of 100 records or less per data import.

Sample CSV File: "Download" - to view the column format.

To import data, select the file by clicking "Browse" and select the CSV file you want to upload. Click "Upload" once you have selected the file. The data will then be populated on the "Employee List" screen.

Reporting Methods

The HR admin can define the reporting method between an ESS-Employee and an ESS-Supervisor. To define the reporting method, go to PIM>> Configuration>> Reporting Methods and click “Add”, the screen as shown in Figure 6.6 will appear.

Figure 6.6: Add Reporting Method

“Direct” and “Indirect” Reporting Methods are already pre-defined. To add, enter the reporting method “Name” and click “Save”

The reporting method name will then be listed as shown in Figure 6.7.

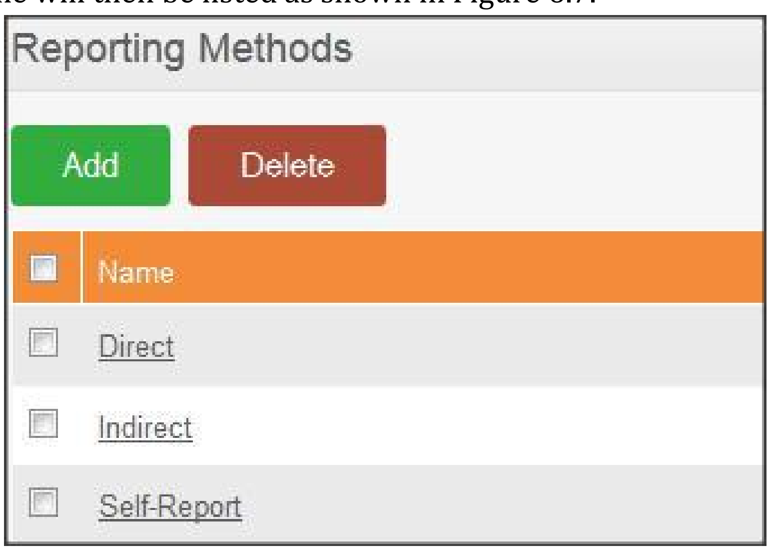


Figure 6.7: Reporting Method

You may also add multiple entries of reporting methods. To delete a reporting method click on the check box next to the Reporting Method 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”.

Termination Reasons

This feature allows the HR Admin to define various termination reasons that is used by the company. To add a termination reason, go to PIM>>Configuration>>Termination Reason and click “Add” , the screen as shown in Figure 5.9 would appear. Click “Save” once the fields are added.

Figure 6.8: Add Termination Reason

The entry will then be added to the list as shown in Figure 6.9.

Figure 6.9: Termination Reasons

The following are default termination reasons:

- Contract not renewed
- Deceased
- Dismissed
- Laid-off
- Other
- Physically Disabled/Compensated
- Resigned
- Resigned-Company Requested
- Resigned-Self Proposed
- Retired

You may also add multiple entries of termination reasons. To delete a termination reason click on the check box next to the "Termination Reason" 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".

6.2 Employee List

Lists all the employees entered and imported into the PIM. You can view/edit details of a particular employee by clicking on the employee's name or ID. To view the employee list, go to PIM>>Employee List and the screen as shown Figure 6.1 would appear.

Add Delete

	Id	First (& Middle) Name	Last Name	Job Title	Employment Status	Sub Unit	Location	Supervisor
	0004	Mark	Boucher	Finance Manager	Full-Time Permanent	Finance Division	HQ	
	0011	Jennifer	Brown	Audit Trainee	Full time Contract	Finance Division	HQ	Mark Boucher
		Anne	Clinton	Controller				
	0002	Russel	Hamilton	HR Admin	Full-Time Permanent	HR	HQ	Kevin Mathews, Nick Silverstone
	0001	Kevin	Mathews	IT Manager	Part-Time Contract	IT Division	HQ	

Figure 6.10: Employee List

You may add multiple entries of employees by clicking "Add" through the screen as shown in Figure 6.1 or you may go to PIM>> Add Employee to enter employee details. *(See Figure 6.2)*
To delete an employee, 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".

6.3 Add Employee

A new employee is added to the system here. Other than importing details this feature allows to add an employee and define a very informative profile. To add an employee, go to PIM>>Add Employee and the screen as shown in Figure 6.11 will appear.

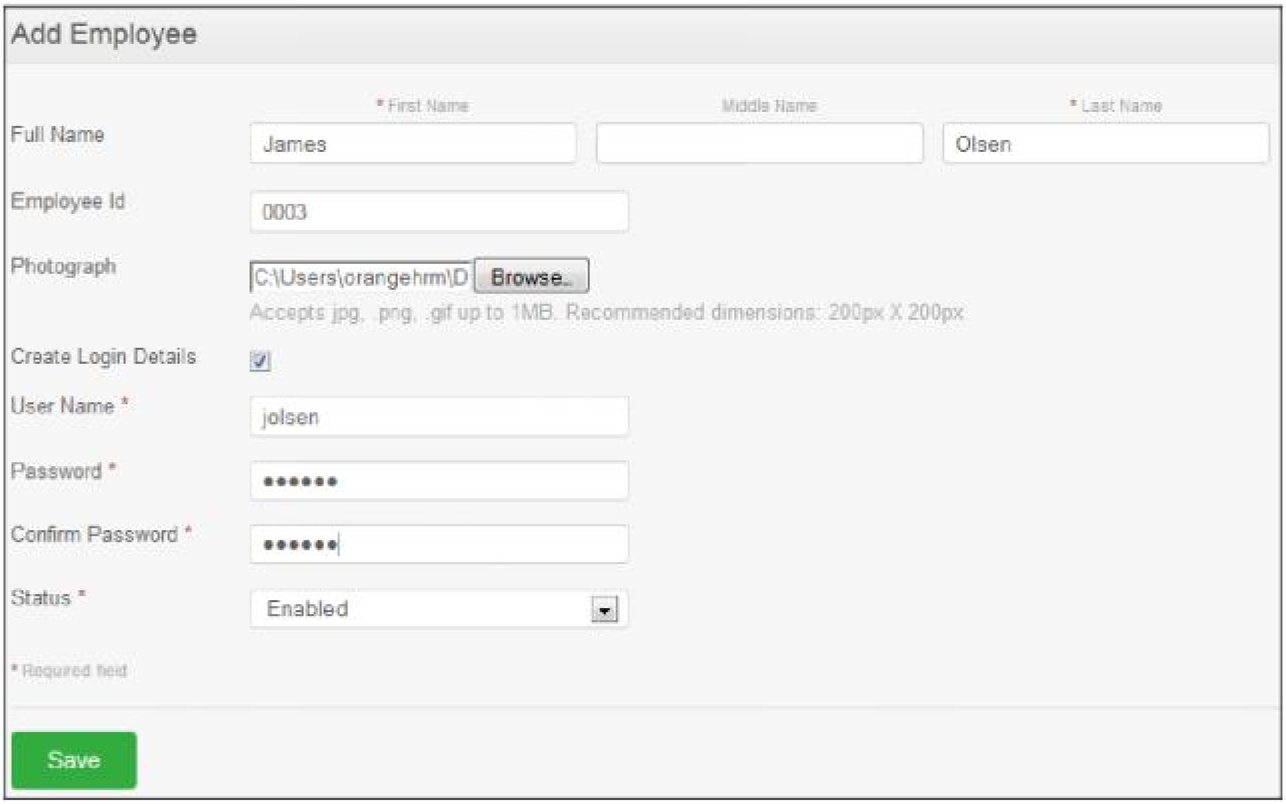


Figure 6.11: Add Employee

Enter the relevant fields and you may also add a picture of the employee. To add a picture, click on "Choose File" and select the picture from the relevant path and click "Open". Employee code is generated automatically, but can be changed if required.

You may also create a user login for the employee through this screen.

***Note:** Please note that the maximum file size of the picture cannot exceed 1 megabyte.
Click "Save" once completed.

Employee's Personal Details

The following information needs to be obtained from each employee to create a complete employee profile that may be used by the company. These features are explained in details as we go on.

Figure 6.12: Employee Details Column

Personal Details

One you have added and saved the employee name with his/her picture and the user logins, the screen as shown in Figure 6.2 will appear. You can also edit the personal details listed below by clicking “Edit” on the bottom of the screen. Clicks “save” once the fields are added.

You can edit the following;

* Code – Employee Id/No
* Last Name
* First Name
* Middle Name
* Nick Name
* Nationality – Select from a list of pre-defined nationalities
* Date of Birth
* Other Id
* Marital Status – Select from the drop down
* Smoker – If the employee is a smoker click on the box
* Gender – Click on the relevant gender
* Driver’s License Number
* License Expiry Date
* Military Service

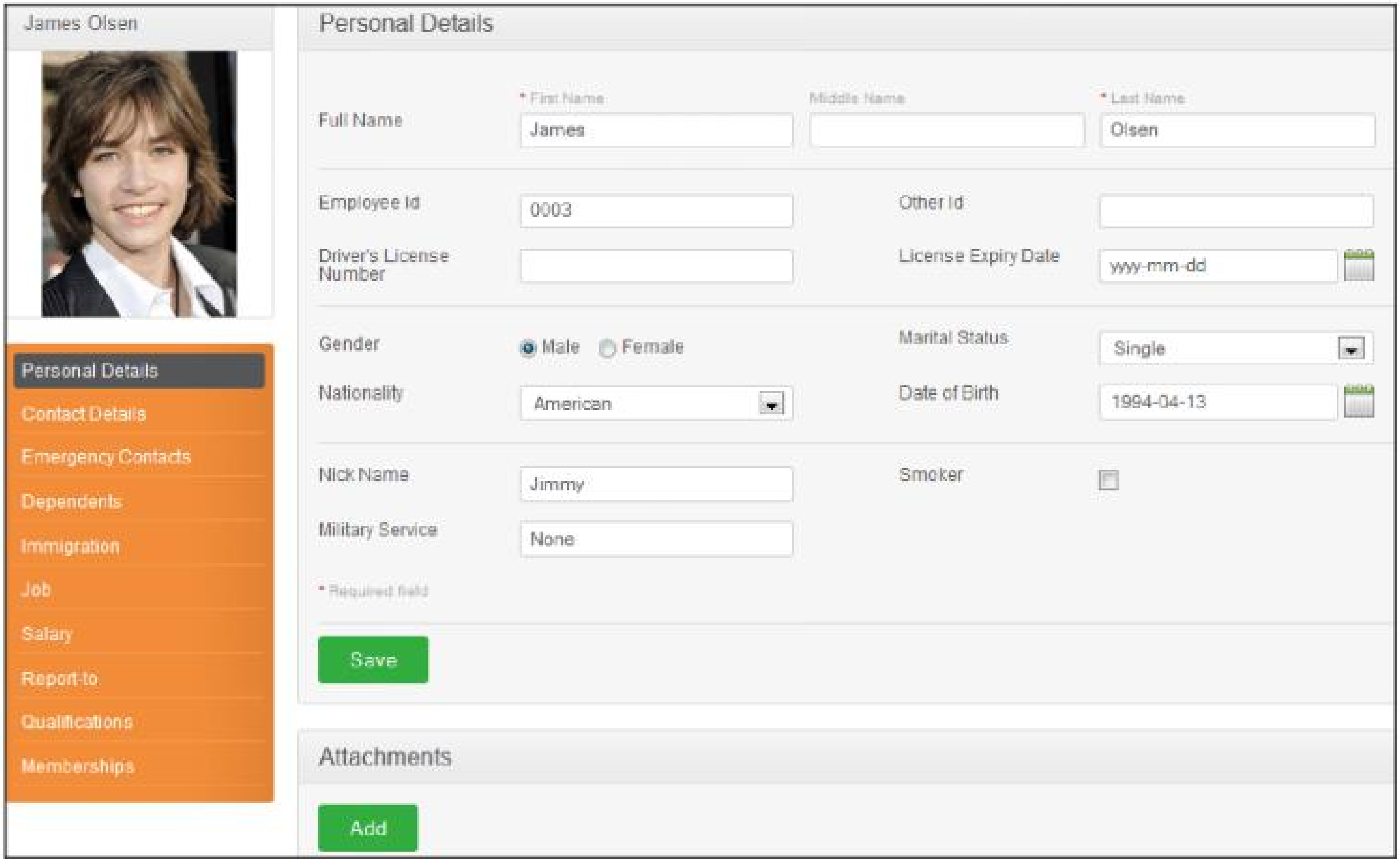


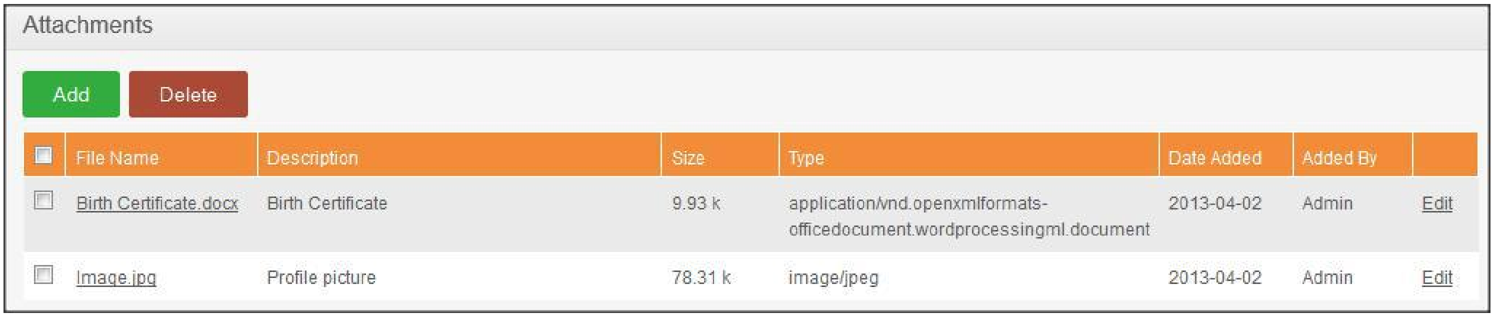
Figure 6.13: Personal Details

Click "Save" once completed.

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" as shown in Figure 6.14.

Figure 6.14: Attachments

You may upload multiple entries of supporting attachments. You may edit the following attachments by clicking “Edit” on the right hand end of a particular entry as shown in Figure 6.15. To delete an attachment, 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

Add Delete

	File Name	Description	Size	Type	Date Added	Added By	
	Birth Certificate.docx	Birth Certificate	9.93 k	application/vnd.openxmlformats-officedocument.wordprocessingml.document	2013-04-02	Admin	Edit
	Image.jpg	Profile picture	78.31 k	image/jpeg	2013-04-02	Admin	Edit

Figure 6.15: Manage Attachments

Contact Details

Contact information of an employee can be entered from here. Click on “Contact Details” from the Employee Details column and the screen as shown in Figure 6.16 will appear.

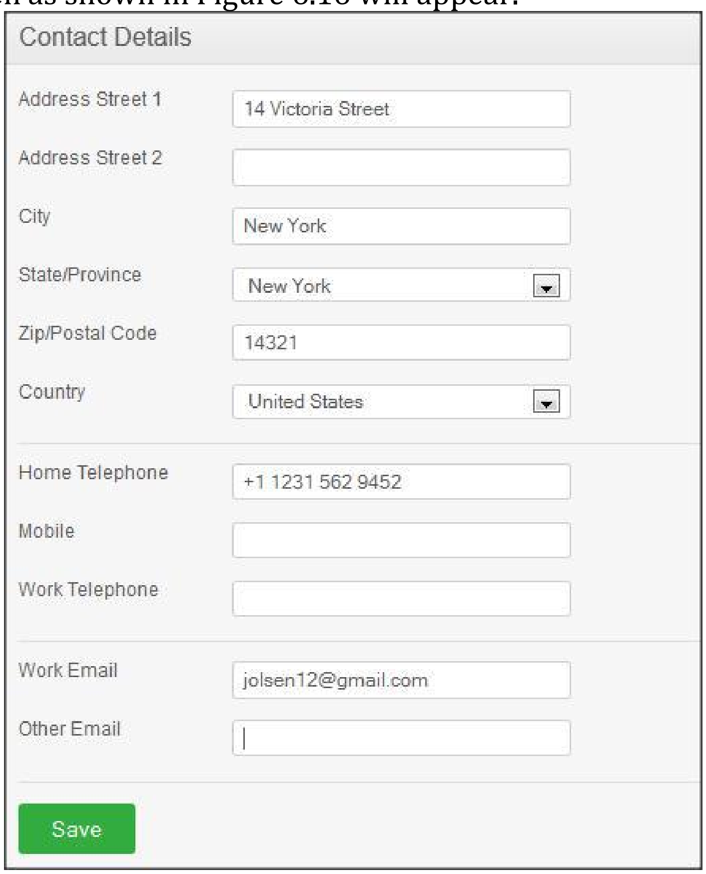


Figure 6.16: Contact Details

Click "Edit" to enter the information.

You can edit the following;

1. Country – Select the country from the drop down
2. Street 1
3. Street 2
4. City/Town
5. State/Province – If the country is United Sates you can select from the drop down or
6. you need to enter it manually
7. ZIP Code
8. Home Telephone
9. Mobile
10. Work Telephone
11. Work Email
12. Other Email

Once you completed this form click "Save".

Emergency Contact

Contact details of an employee which will be needed during an emergency can be entered here. Select "Emergency Contacts" from the Employee Details column and the screen as shown in Figure 6.17 will appear.

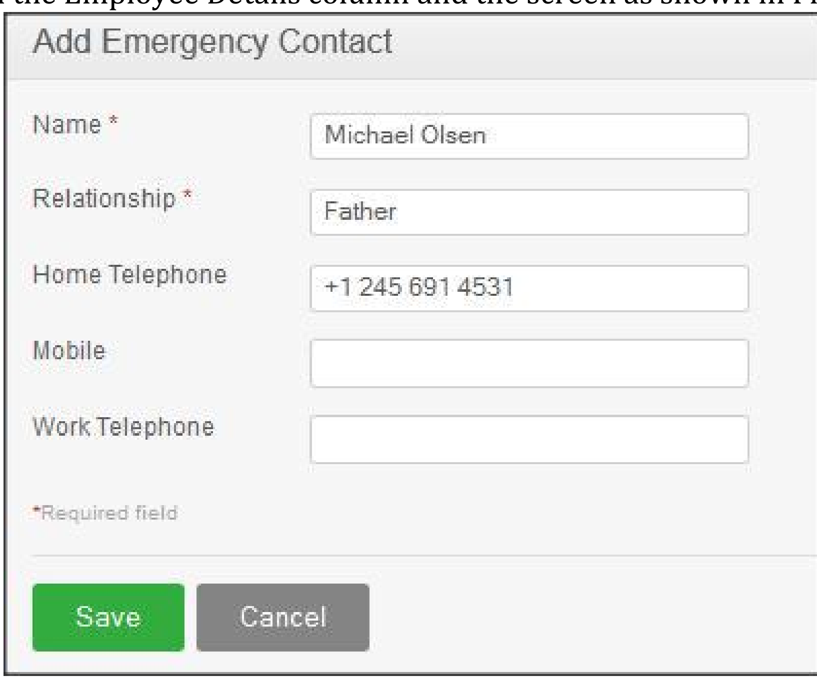


Figure 6.17: Add Emergency Contact

Enter the "Name" of the person you wish the company to contact in case of emergency, the "Relationship" of the employee to 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 6.18.

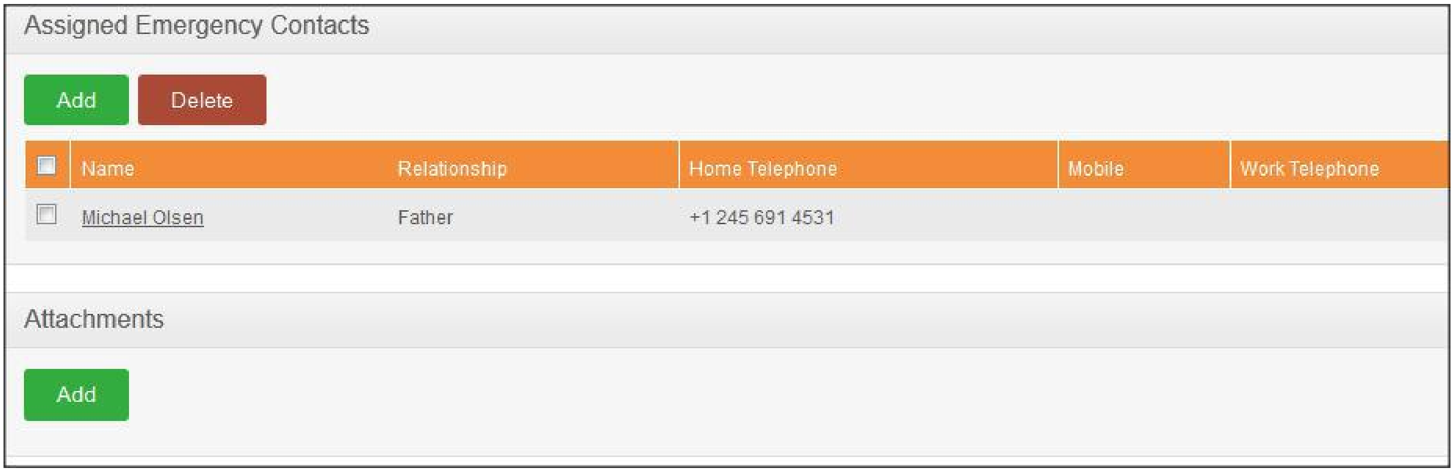


Figure 6.18: Assigned Emergency Contacts

You may add multiple entries of emergency contact person. 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".

Dependents

If an employee has any dependants you can enter them here. To add a dependent, click on "Dependents" from the Employee Details column and the screen as shown in Figure 6.19 will appear.

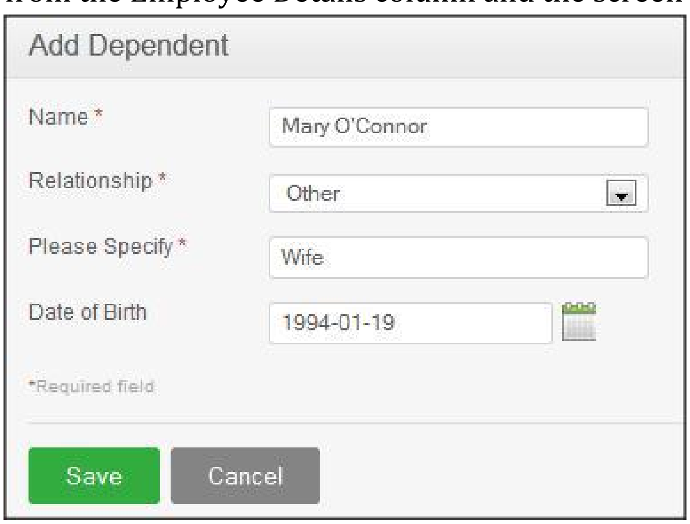


Figure 6.19: Add Dependent

Enter the "Name" of the dependant of the employee, the "Relationship" of the dependant to the employee and the "Date of Birth" of the dependant. Click "Save" once you have entered the following fields and the dependant will be listed as shown in Figure 6.20.

Figure 6.20: 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 upload the following file by clicking "Upload".

Immigration

Immigration information can be entered here. To add immigration information of a particular employee, select "Immigration" from the Employee Details column and the screen as shown in Figure 6.21 will appear.

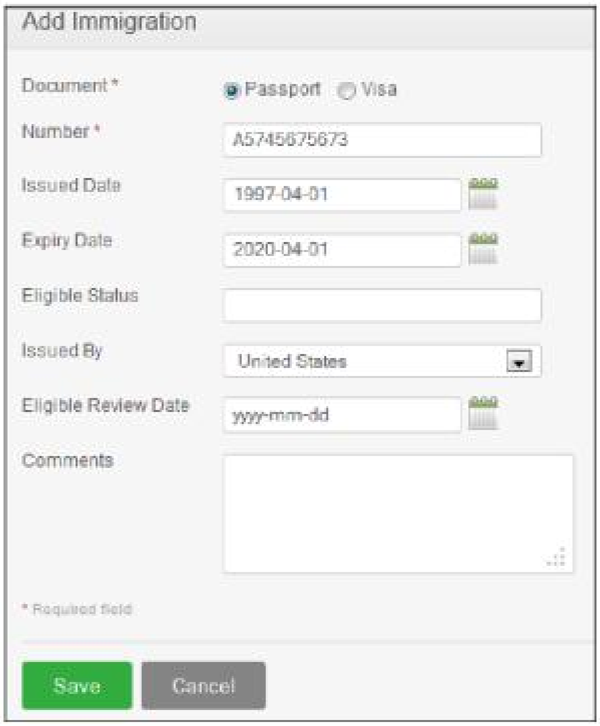


Figure 6.21: Add Immigration

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 his 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 6.22.

Figure 6.22: 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 upload the following file by clicking “Upload”.

Job

You could describe the role of the employee in the company through this feature. To define the employee's job, select "Job" from the Employee Details column and the screen as shown in Figure 6.23 will appear. Click "Edit" to enter the job details of the employee.

Enter the following fields and click "Save" once done.

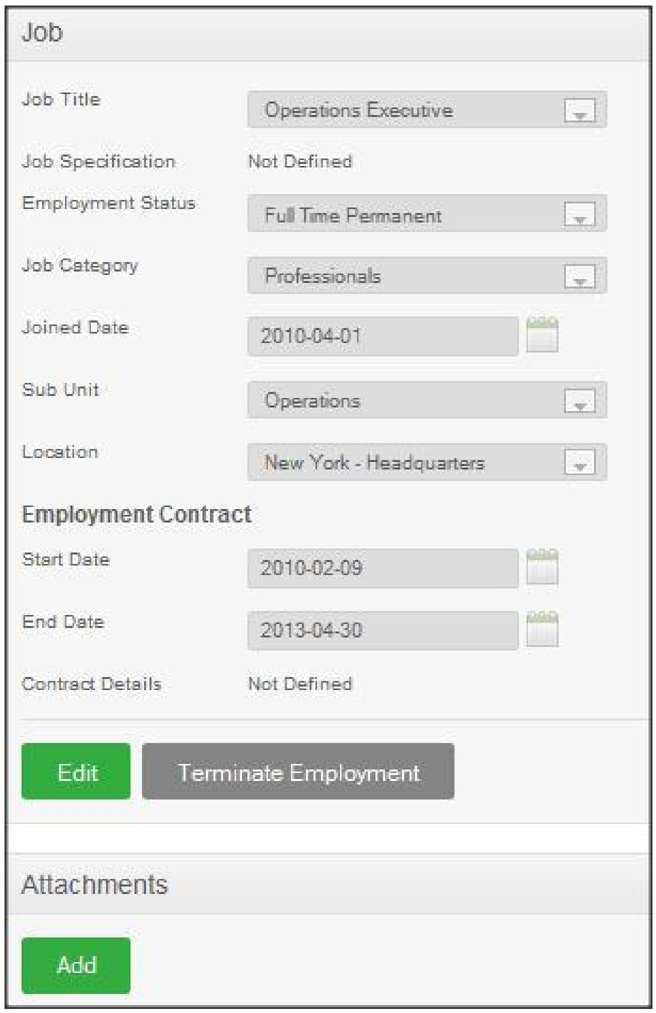


Figure 6.23: Job

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".

You may also terminate the employment of an employee by clicking "Terminate Employment" and the screen as shown in Figure 6.24 will appear.

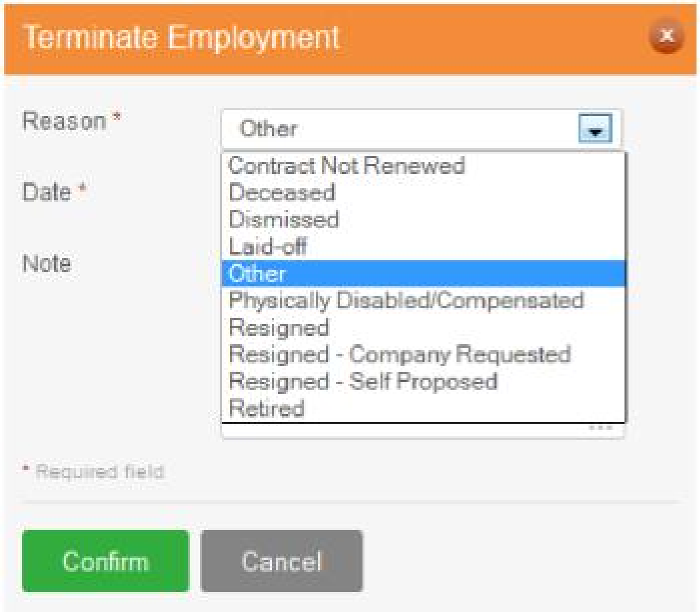


Figure 6.24: Terminate Employment

You may select the employment "Termination Reason", the "Date" (the current date is the default date) the employee was terminated and a note regarding the termination of employment. The termination reasons have been pre-defined under Configuration>> Termination Reasons.

Click "Confirm" to confirm the termination. The employee name will no longer appear in the employee list database.

Salary

Information with regards to salary of an employee is entered here. To define the employee's salary information, select "Salary" from the Employee Details column and the screen as shown in Figure 6.25 will appear.

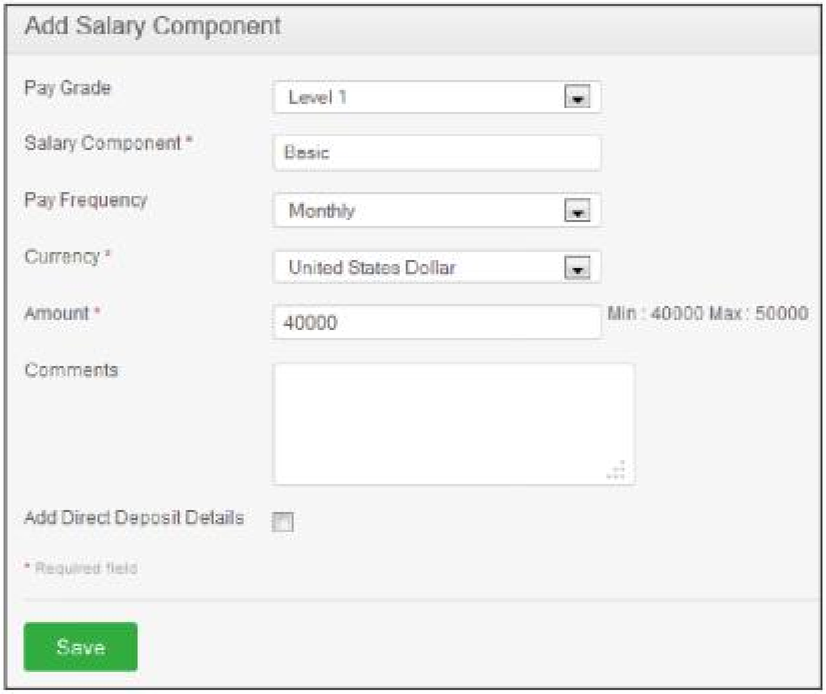


Figure 6.25: Add Salary Component

Enter the following fields:

- Pay Grade: the pay grade category that the employee falls under (Pre-defined under Admin Module)
- Salary Component: The different compensation that an employee obtains from the company
- Pay Frequency: The frequency that an employee is paid his/her salary
- Currency: The currency that employee is paid in(pre-defined under Admin Module)
- Amount: based on an employee's pay grade category, a minimum and maximum salary amount is specified
  (Pre-defined under Admin Module) and cannot be less than or greater than the specified amount.
- Comment : you may enter any important comment regarding the salary information

➢ Direct Deposit

If salaries of employees are to be transferred or deposited into accounts, those details can be specified here.

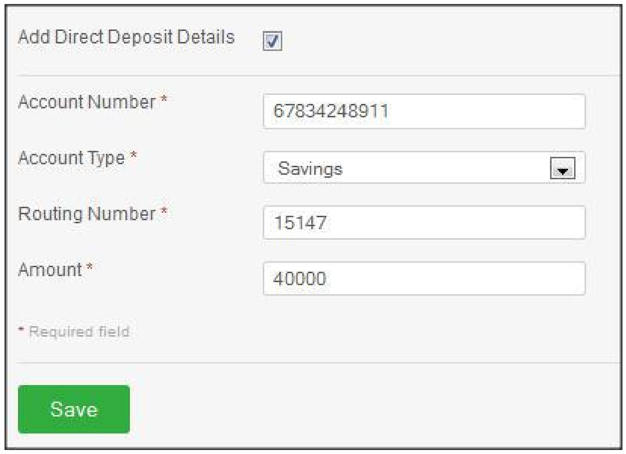


Figure 6.26: Add Direct Deposit Details

Click on the "Add Direct Deposit Details" check box and enter the following details:

- Account Number:
- Account Type: Savings/ Checking/Others. If "Others" is selected, you need to specify other account types that an employee may have.
- Routing Number: routing number of the checks.
- Amount: the amount to be deposited.

Once you have entered the following details, click "Save" and the following salary components with the direct deposit details will be listed as shown in Figure 6.27.

Figure 6.27: Assigned Salary Components

You may enter multiple salary components. . 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”.

Report To

Here you can define to whom the particular employee will report-to or who his subordinates are. Once this is done the particular supervisor will be able to view the following when he logs in;

- PIM of the particular employee
- Leave Summary of his subordinates
- Leave List of his subordinates
- Attendance Report of his subordinates
- Time Sheets of his subordinates

You can set an employee to report-to more than one supervisor and a supervisor can have many subordinates who report to him.

To define the supervisors and the subordinates of a particular employee, select “Report to” from the Employee Details column and the screen as shown in Figure 6.28 will appear.

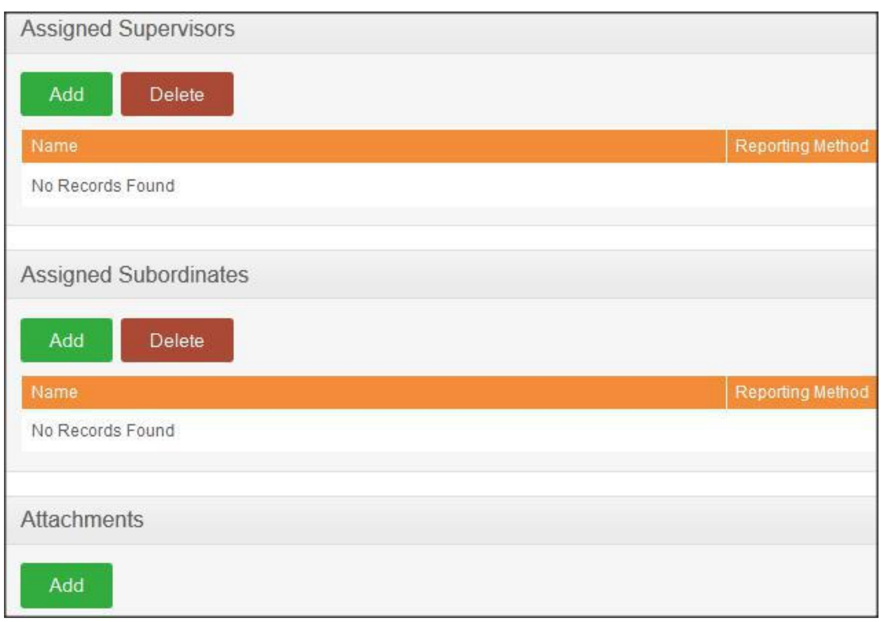


Figure 6.28: Report-to

To assign a supervisor/subordinate for a particular employee, click “Add” under “Assigned Supervisors” or “Assigned Subordinate” and the screen as shown in Figure 6.29 and Figure 6.30 will appear respectively.

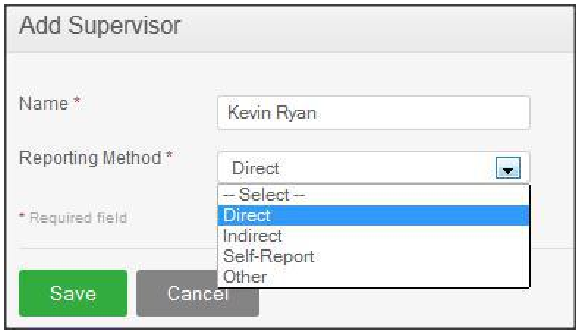


Figure 6.29: Add Supervisor

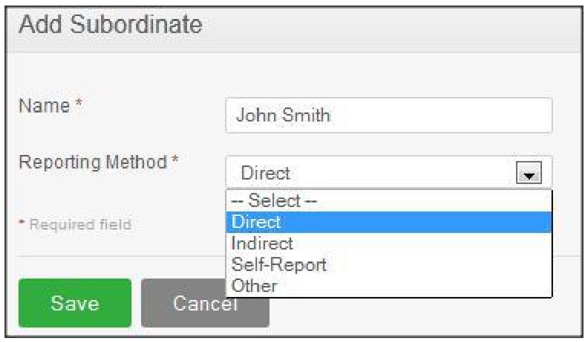


Figure 6.30 Add Subordinate

Enter the “Name” of the supervisor/subordinate and select from the “Reporting Method” selections. Click “Save” once the fields are entered.

Once the supervisor/subordinates have been defined they will be listed as shown in Figure 6.31.

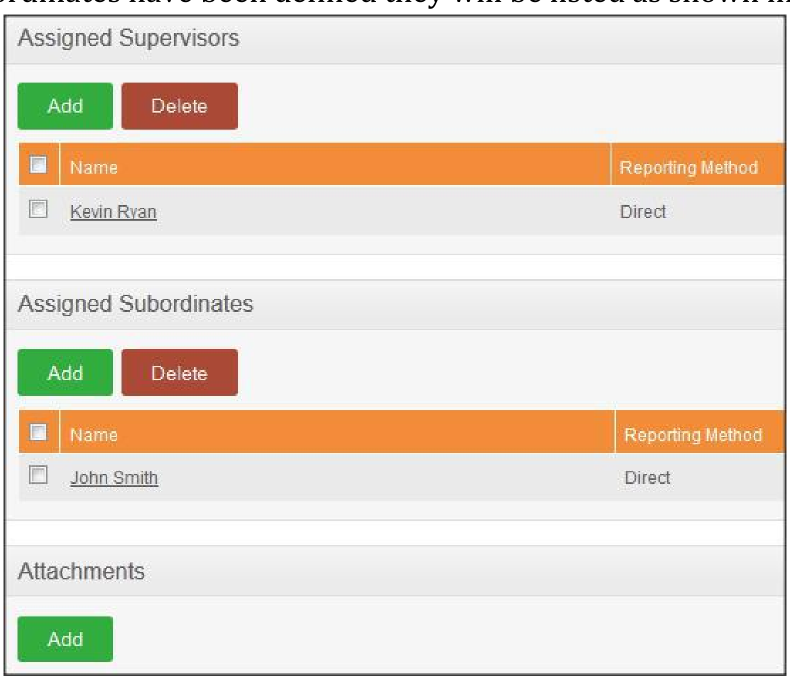


Figure 6.31: Assigned Supervisors/Assigned Subordinates

You may enter multiple entries of supervisors or subordinates for a particular employee. 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”.

Qualifications

- **Work Experience**

Previous work experiences of an employee can be entered here. To enter employee’s previous work experience, select “Qualification” under the Employee Details column and click “Add” under “Work Experience” and the screen as shown in Figure 6.32 will appear.

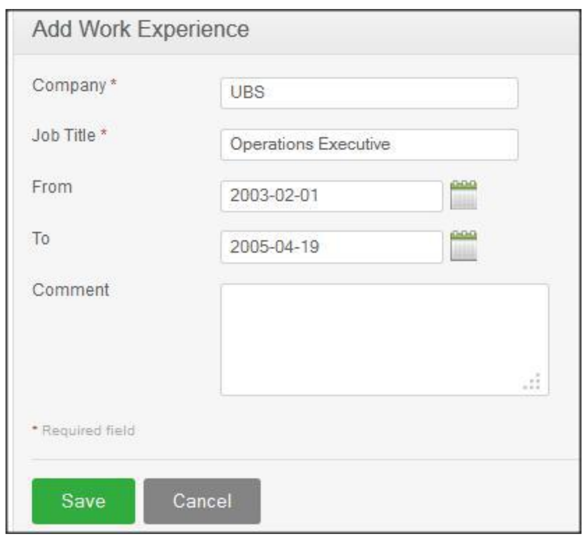


Figure 6.32: Add Work Experience

Click “Save” once all the fields are entered and the particular work experience will be listed as shown in Figure 6.33.

Figure 6.33 Work Experience

You may enter multiple entries of work experience. 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”.

- **Education**

Education details of an employee can be entered here. To enter employee’s education background, select “Qualification” under the Employee Details column and click “Add” under “Education” and the screen as shown in Figure 6.34 will appear.

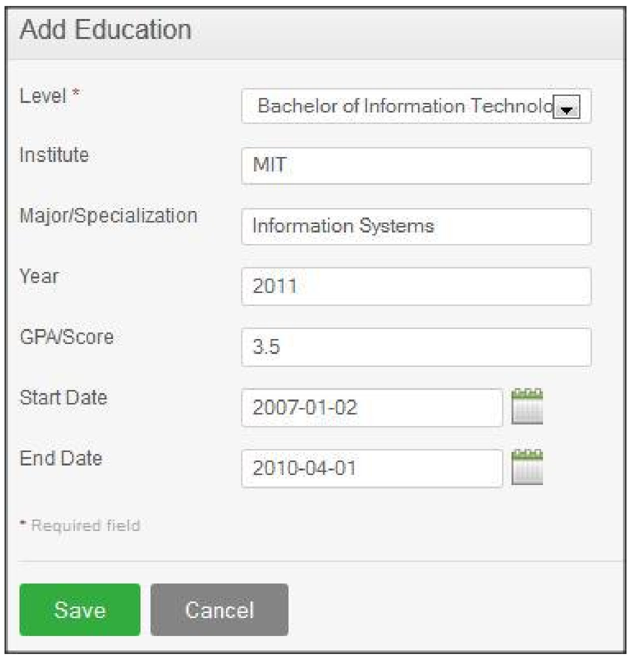


Figure 6.34: Add Education

Click “Save” once all the fields are entered and the particular work experience will be listed as shown in Figure 6.35.

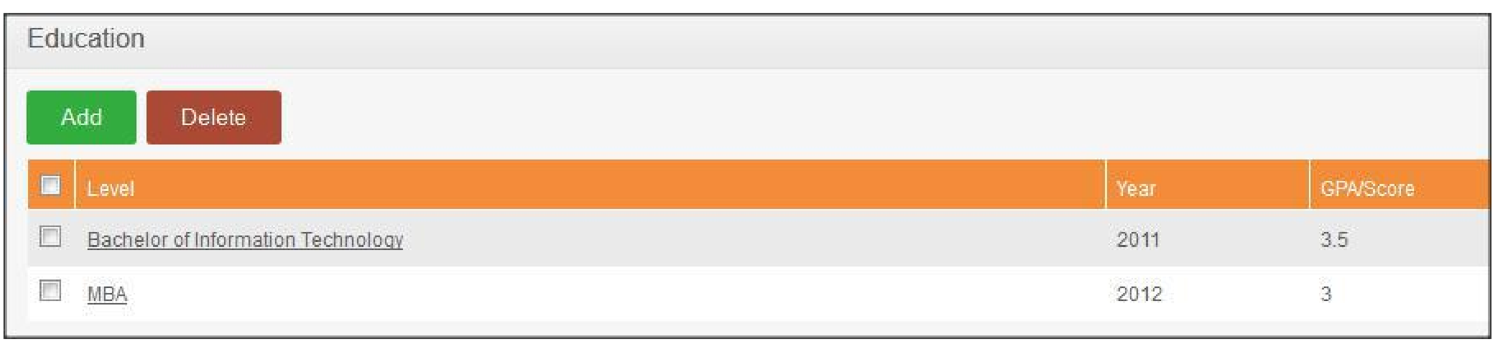


Figure 6.35: Education

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 an employee has any special talents or skills they can be entered here. To enter an employee's skills, select "Qualification" under the Employee Details column and click "Add" under "Skills" and the screen as shown in Figure 6.36 will appear.

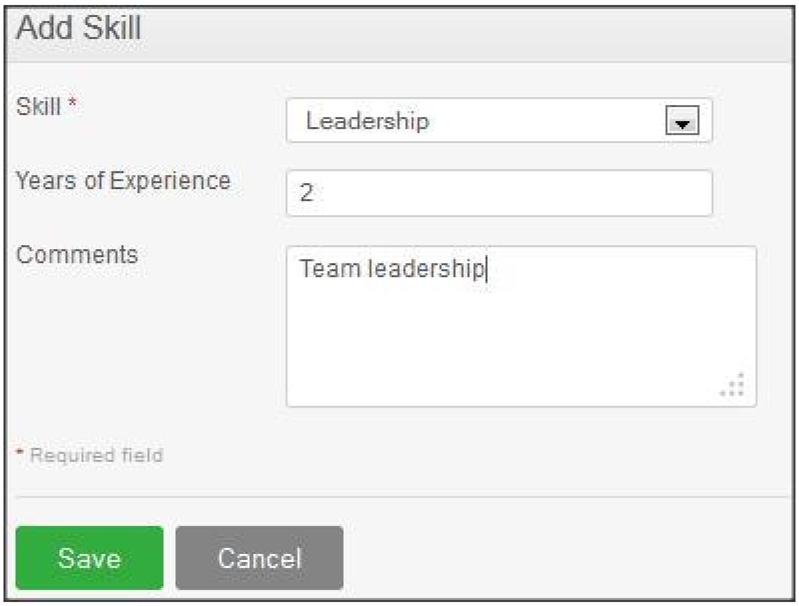


Figure 6.36: Add Skill

Click "Save" once all the fields are entered and the particular work experience will be listed as shown in Figure 6.37.

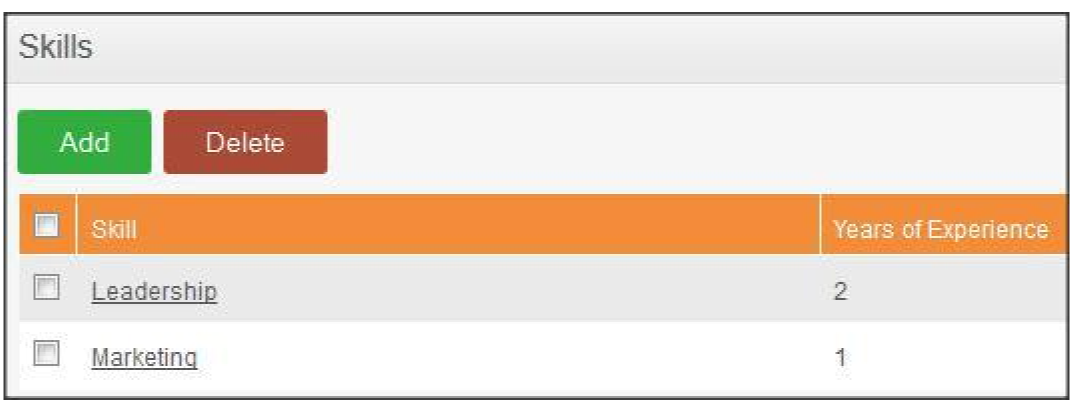


Figure 6.37: Skills

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 your employees are competent in, with the level of competency. To enter an employee’s language of competency, select “Qualification” under the Employee Details column and click “Add” under “Language” and the screen as shown in Figure 6.38 will appear.

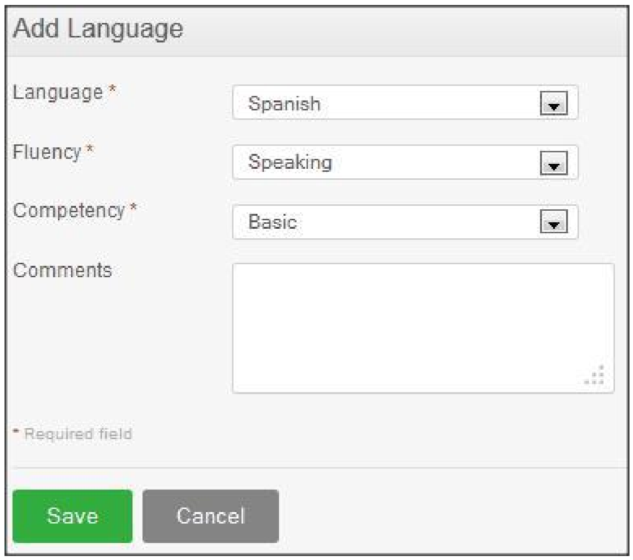


Figure 6.38: Add Language

Click “Save” once all the fields are entered and the particular work experience will be listed as shown in Figure 9.0.

Figure 6.39: Languages

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 an employee can have. To enter an employee's licenses, select "Qualification" under the Employee Details column and click "Add" under "License" and the screen as shown in Figure 6.40 will appear.

Figure 6.40: Add License

Click "Save" once all the fields are entered and the particular work experience will be listed as shown in Figure 6.41.

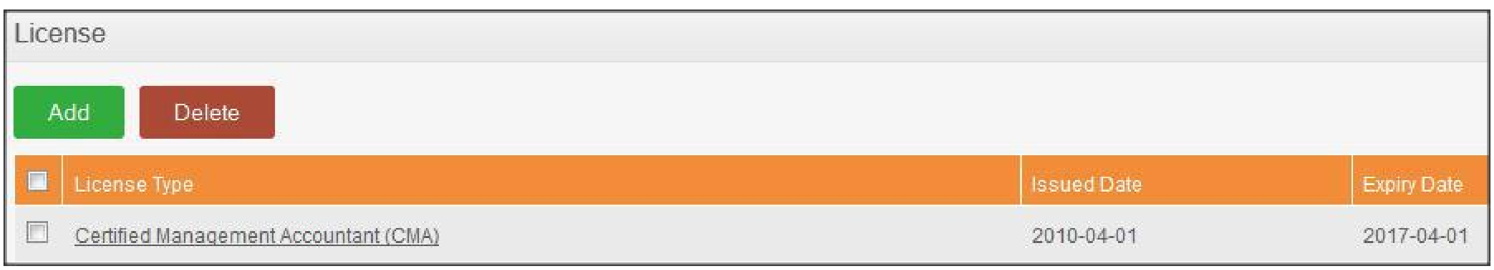


Figure 6.41: Licenses

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

Supporting documents of a particular employee that might be needed by the management can be attached here. For example you can attach documents like personal profile, certificates or the resume of an employee. Please note that each document cannot exceed 1 megabyte, but you can attach more than one document. To attach click "Browse" select the file and click Upload" to upload it, as shown in Figure 6.42.

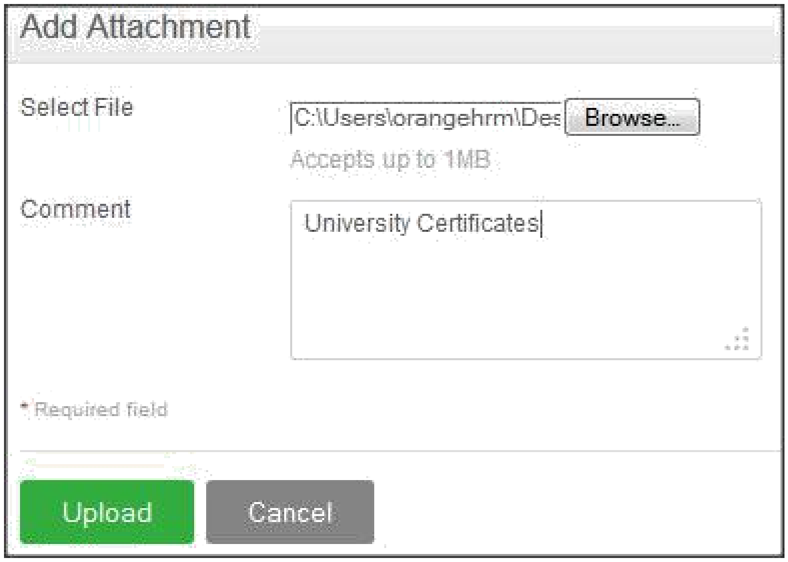


Figure 6.42: Add Attachments

Once you have uploaded the file, the file will be listed as shown in Figure 6.43.

Figure 6.43: Manage Attachments

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

Membership

If employees are members of any committee, institute etc. those details can be entered here. To enter employee’s membership details, select “Membership” from the Employee Details column and click “Add” and the screen as shown in Figure 6.44 will appear.

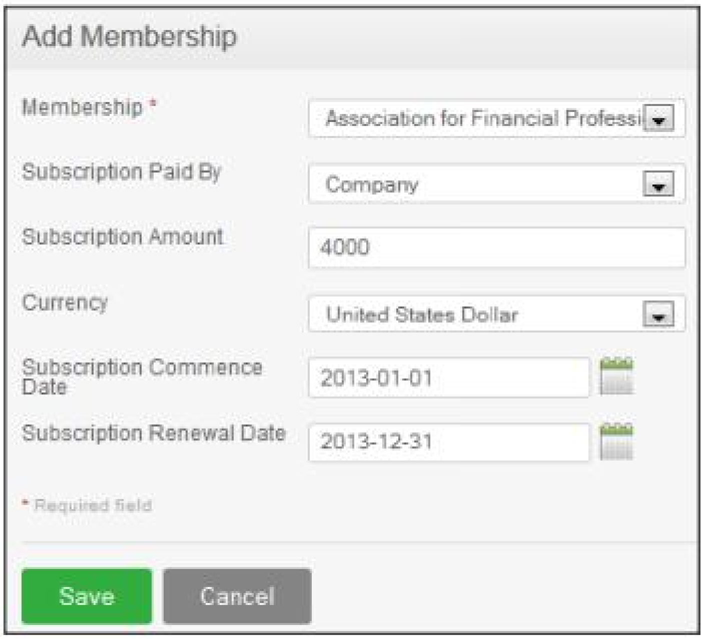
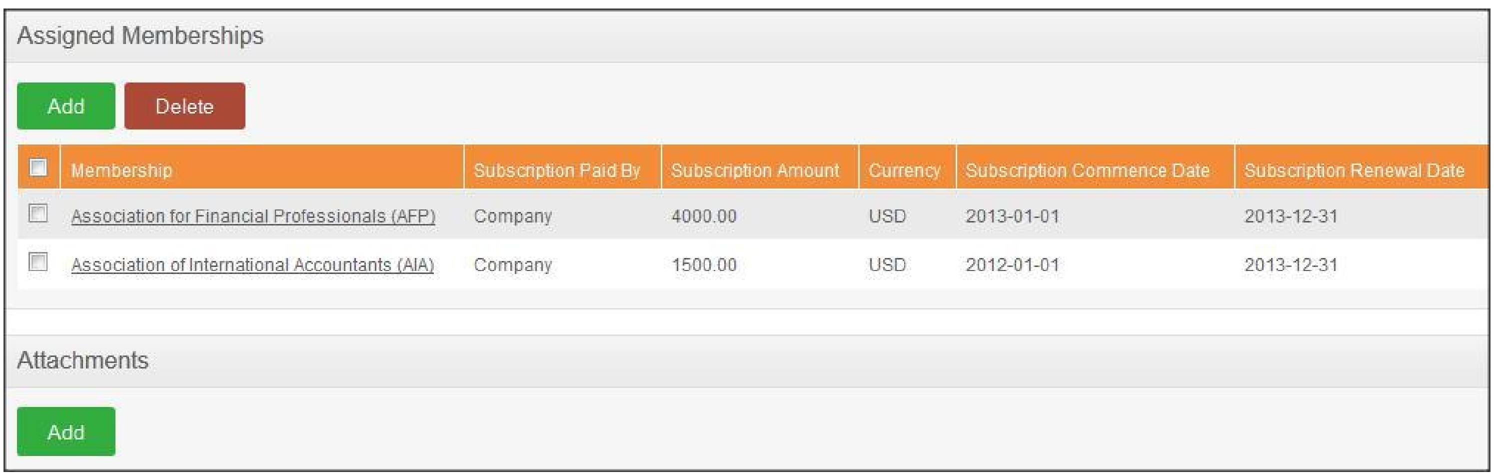


Figure 6.44: Add Membership Details

Click "Save" once all the fields are entered and the particular work experience will be listed as shown in Figure 6.45.


Assigned Memberships

Add Delete

	Membership	Subscription Paid By	Subscription Amount	Currency	Subscription Commence Date	Subscription Renewal Date
	Association for Financial Professionals (AFP)	Company	4000.00	USD	2013-01-01	2013-12-31
	Association of International Accountants (AIA)	Company	1500.00	USD	2012-01-01	2013-12-31

Attachments

Add

Figure 6.45: 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".

7.0 Leave Module

A comprehensive leave management module with extensive possibilities of defining leave types, company holidays, applying for and assigning of leave for the employees of the company. It caters for all application and approval processes and is able to display information on leave entitlement, balance, history etc.

The functionality of the Leave Module differs depending on the rights of the user. The Leave Module will be described from the perspective of an administrator, an ESS User who is a supervisor and the normal ESS user.

The Admin can:

- View Leave Entitlements for each employee and entitle leave days of each available type
- Generate Leave Entitlements and Usage Reports for himself/herself and all employees
- Configure leave periods, leave types, work week and holidays
- Assign Leave for any employee
- See Scheduled Leave for any employee
- See list of Taken Leave for any employee
- If the admin user is an employee then he will see the 'Apply' 'My Leave' and 'Entitlements' options along with the rest of the features.

A Supervisor can:

- View the Personal or Employee (subordinate) Leave Entitlements
- Generate Leave Entitlements and Usage Reports for himself/herself and his/her subordinates
- View the Leave List
- Apply Leave
- Assign Leave for his/her subordinates
- Approve/Reject Leave for his/her subordinates

The ESS User can:

- View the Personal Leave Entitlement
- Generate Leave Entitlements and Usage Reports for himself/herself
- View the detailed leave information
- Apply for leave

7.1 Configure

The HR admin is able to configure the following that will be reflected throughout the Leave Module as shown in Figure 7.1.

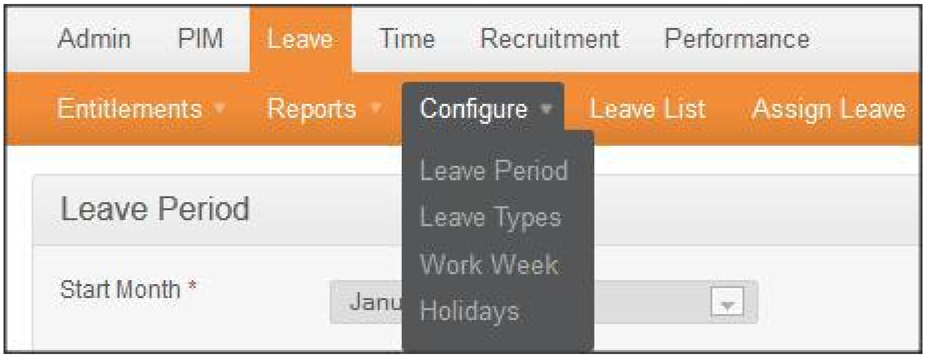


Figure 7.1: Configure

- Leave Period
- Leave Types
- Work Week
- Holidays

Leave Period

The HR Admin and other users with admin rights are able to define the leave period that will be used when applying/assigning leave. To define a leave period, go to **Leave>> Configure>> Leave Period** and a screen as shown in Figure 7.2 will appear. Click "Edit" to enter fields.

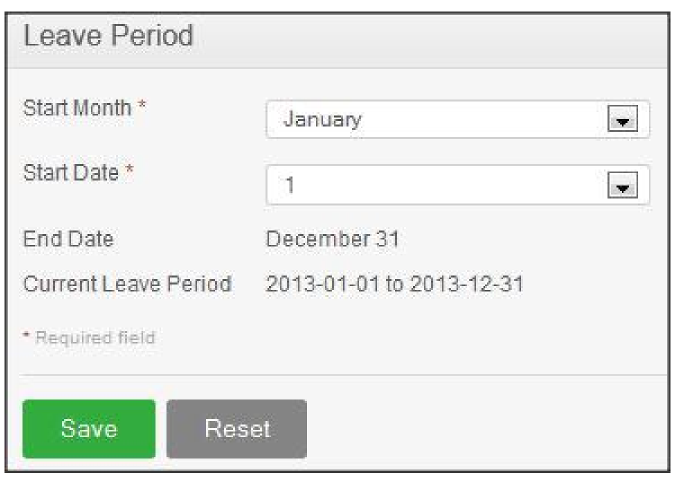


Figure 7.2: Define Leave Period

You can define the “Start Month” and “Start Date” from the drop down menus. The system will automatically set the “End Date” as to have a one-calendar year leave period.

Click “Save” and the current leave period will be stated below the “End Date”. This will be the default leave period.

Leave Types

Through this section the admin and any other user with admin rights will be able to define leave types, which are compatible with the HR policies of the company. To add leave types, go to **Leave>> Configure>> Leave Types** and the screen as shown in Figure 7.3 will appear.

Click “Add” to enter a field. Once the field is added, click “Save”.

By clicking the “Is Entitlement Situational” option, that leave type will be excluded from reports unless there is some activity. e.g. maternity leave, jury duty leave.

Figure 7.3: Add Leave Type

Once a leave type is added, it will be listed as shown in Figure 7.4. You may add multiple entries of leave types. You may view/edit leave type by clicking on the “Leave Type” name.

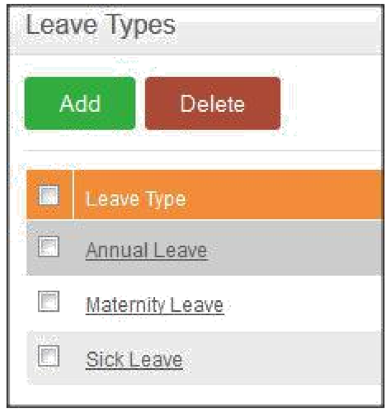


Figure 7.4: Leave Types List

To delete a leave type, click on the check box next to the "Leave Type" 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 Week

The HR Admin and any other users with admin rights will be able to define the work weeks for all employees. To define work week, go to **Leave>> Configure>> Work Week** and the screen as shown in Figure 7.5 will appear.

Click "Edit" to define the work week.

In this feature, you can define the days that the company operates whether they are; Full Day, Half Day, Non-Working Day.

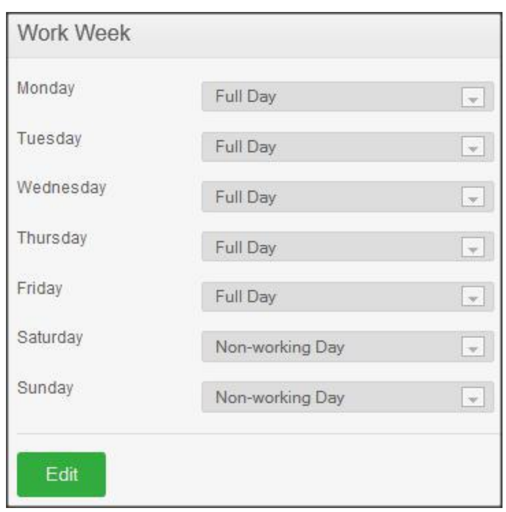


Figure 7.5: Define Work Week

Click "Save" once you have configured the work week settings.

Holidays

The HR admin and other users with admin rights can define holidays that will be applicable to the entire company and will be taken into consideration while calculating leave duration.
To define “Holidays”, go to **Leave>> Configure>> Holidays** and click “Add”, a screen as shown in Figure 7.6 will appear.

Figure 7.6: Add Holiday

Enter the “Name of the Holiday”, the “Date” it will occur and checking the “Repeats Annually” will mean that the holiday will occur on the same date in the following years and select whether the holiday stated will be considered as a “Full Day /Half Day” holiday.

Click “Save” once you have defined the holiday.

Once a holiday is added, it will be listed as shown in Figure 7.7.
You also have the option to also “Search” for the holidays that are occurring for a particular leave period.

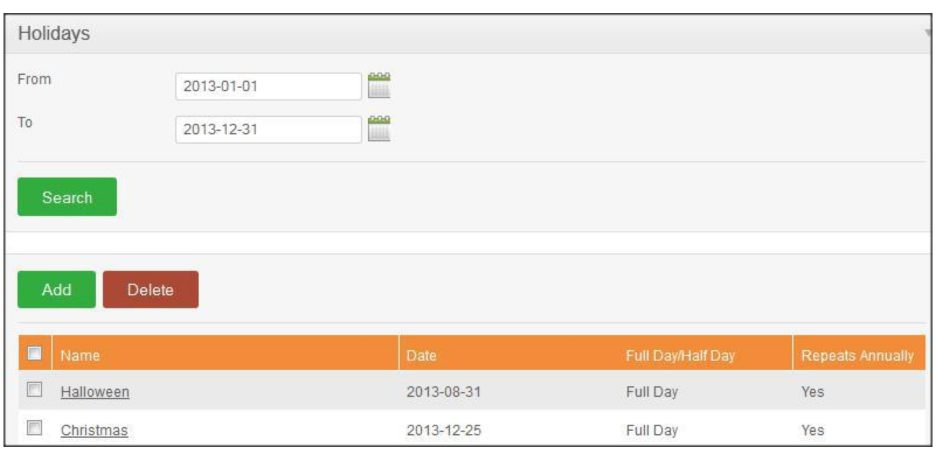


Figure 7.7: Holiday List

You may add multiple entries of holidays. You may view/edit holidays by clicking on the “Holiday” name. To delete a holiday, click on the check box next to the “Holiday” 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”.

7.2 Leave Entitlements

This feature allows users to add (Admin Users only) and view employee leave entitlements. The menu will show data depending on the user type:

- **Admin:** will see “Add Entitlements” and “Employee Entitlements” and has full rights.
- **ESS User-Supervisor**: will see “Employee Entitlements” (subordinates only) and “My Entitlements” and has viewing rights only.
- **ESS User**: will see “My Entitlements” and has viewing rights only.

HR Admin View of Leave Entitlements

This feature enables the HR Admin and other users with admin rights to Add and View Leave Entitlements for each leave type for all employees.

To add an entitlement to employees, click on **Leave>>Entitlements>>Add Entitlements** and the screen shown in Figure 7.8 will appear.

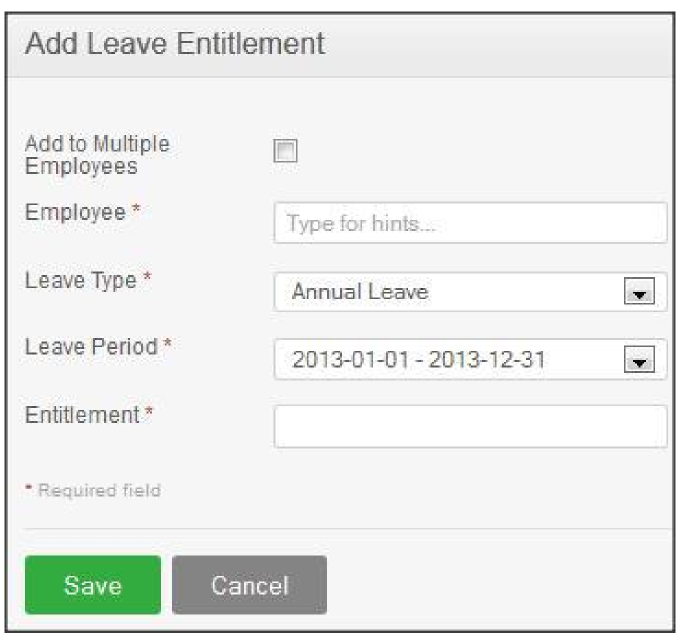


Figure 7.8: Add Leave Entitlement

The HR Admin can select the employee to assign leave to by typing his/her name in the “Employee” textbox. The “Leave Type” (defined under Configure>>Leave Types) can then be selected from the dropdown menu. The “Leave Period” can then be selected. The number of days to assign to that employee can then be given in the “Entitlement” textbox, as shown in Figure 7.9.

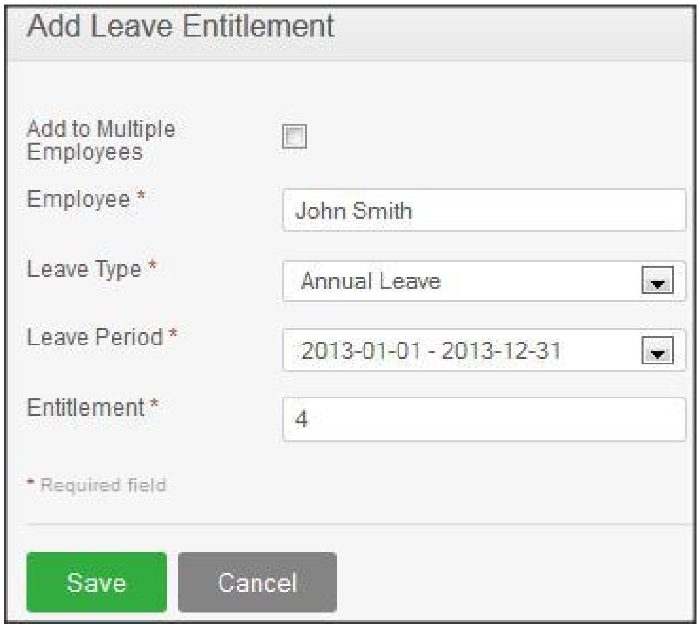


Figure 7.9: Add Leave Entitlement to an employee

If the Admin selects “Add to Multiple Employees”, then the “Employee” field gets replaced with a “Location” and “Sub Unit” field. The Admin can now select a specific location and a sub-unit, and assign a leave entitlement for a certain “Leave Type” to all employees in that location and sub-unit by clicking “Save”, as shown in Figure 7.10.

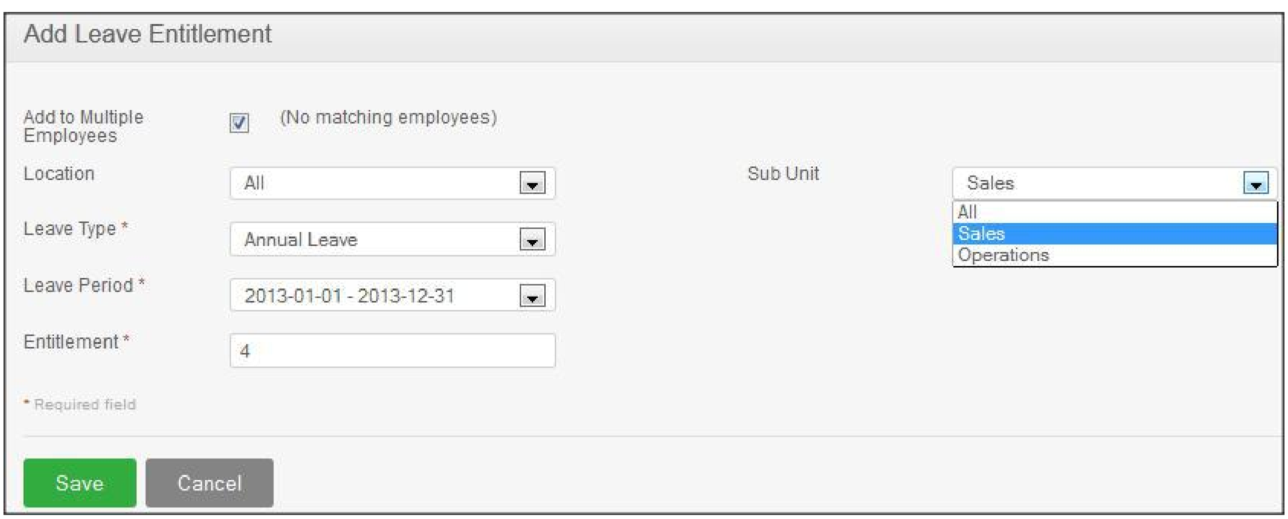


Figure 7.10: Add Leave Entitlement to Employees by Location and Sub-Unit

To view an employee’s leave entitlement, the HR Admin can click on **Leave>>Entitlements>>Employee Entitlements** as shown in Figure 7.11. The Admin can type in the Employee name and select the “Leave Type” from the drop down as well as the “Leave Period”.

Figure 7.11 Search Employee Entitlements

Clicking “Search” will pull up all the leave that that particular employee has been entitled, as shown in Figure 7.12. Clicking “Add” will bring up the “Add Leave Entitlement” window .

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”.

	Leave Type	Entitlement Type	Valid From	Valid To	Days
☐	Annual Leave	Added	2013-01-01	2013-12-31	20.00
	Total				20.00

Figure 7.12: View Employee Entitlement

To edit the leave entitlement, click on the number of days entitled under “Days”, or the date under “Valid From” or “Valid To” and the window as shown in Figure 7.13 will appear.

The Admin will only be able to change the “Leave Period” and the “Entitlement”. Click “Save” once the values have been changed.

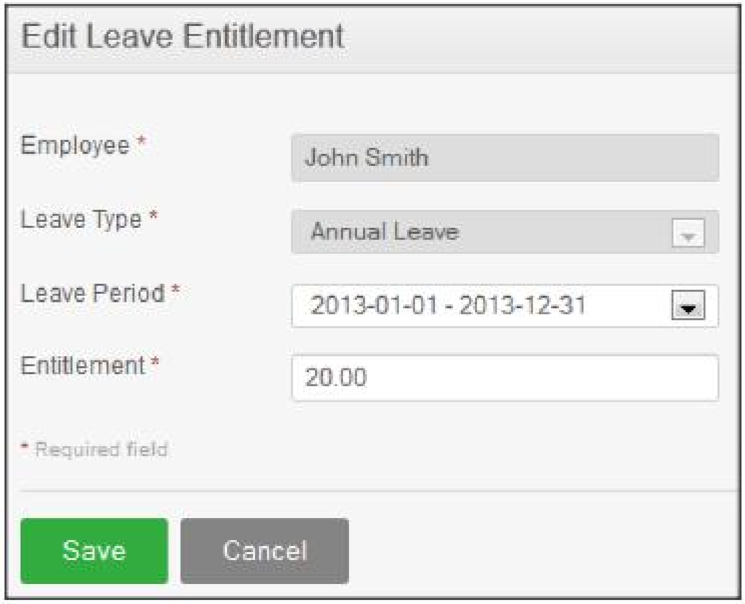


Figure 7.13: Edit Employee Entitlement

ESS Supervisor View of Leave Entitlements

An ESS –Supervisor is only able to "View" his own leave entitlement (**Leave>>Entitlements>>My Entitlements**) and his subordinates leave entitlements (**Leave>>Entitlements>>Employee Entitlements**) when he/she logs in (Figure 7.14).

*Note: An HR Admin will enter the leave entitlement on behalf of an ESS-Supervisor and an ESS-Employee.

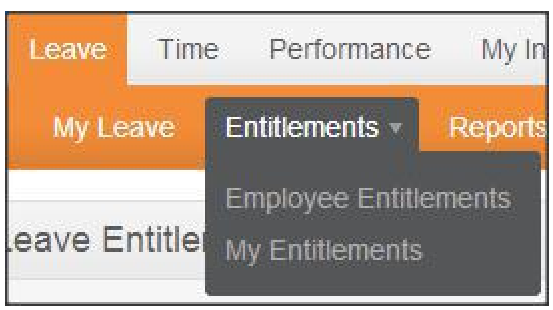


Figure 7.14: ESS-Supervisor Entitlements menu

To view his/her own leave entitlement, the ESS Supervisor has to click on **Leave>> Entitlements>> My Entitlements.** He/she can then search by "Leave Type" or "Leave Period". Clicking "Search" will show all available leave entitlements as shown in Figure 7.15.

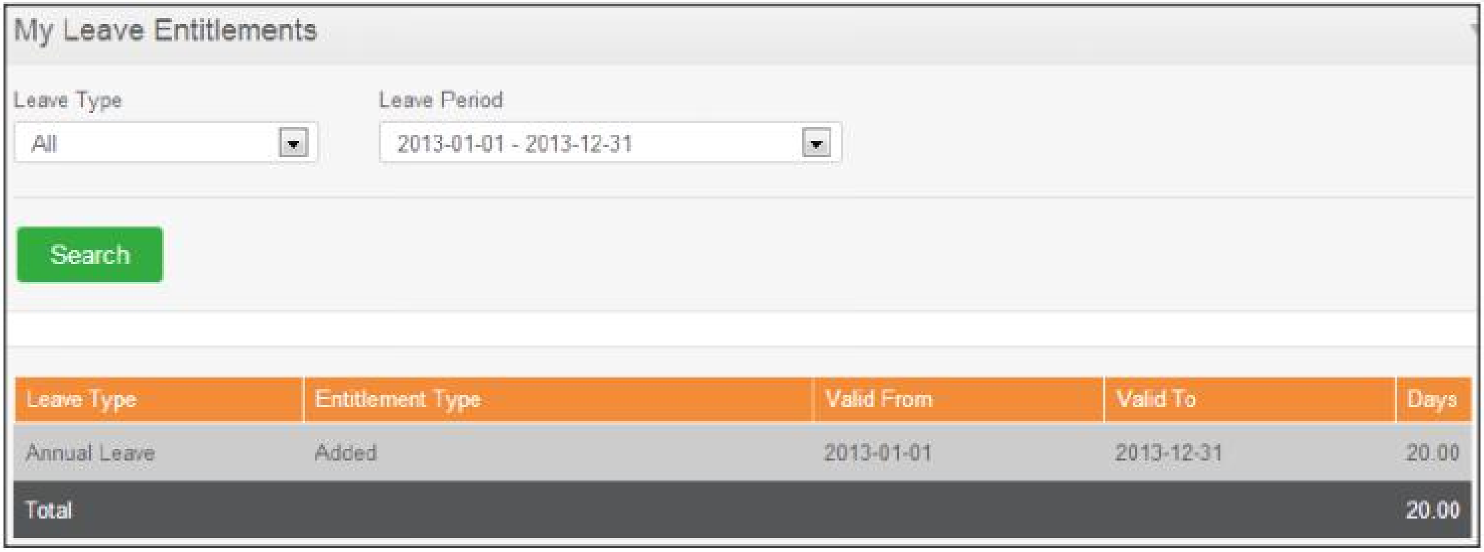


Figure 7.15: ESS-Supervisor- My Entitlements

To view a subordinates leave entitlement, the Supervisor has to click on **Leave>>Entitlements>>Employee Entitlements** and then type in the name of the subordinate under "Employee", and select the "Leave Type" and "Leave Period", as shown in Figure 7.16.

Figure 7.16: ESS-Supervisor - Subordinate Entitlement Search

Clicking "Search" will then show the leave that has been entitled to that subordinate, as shown in Figure 7.17.

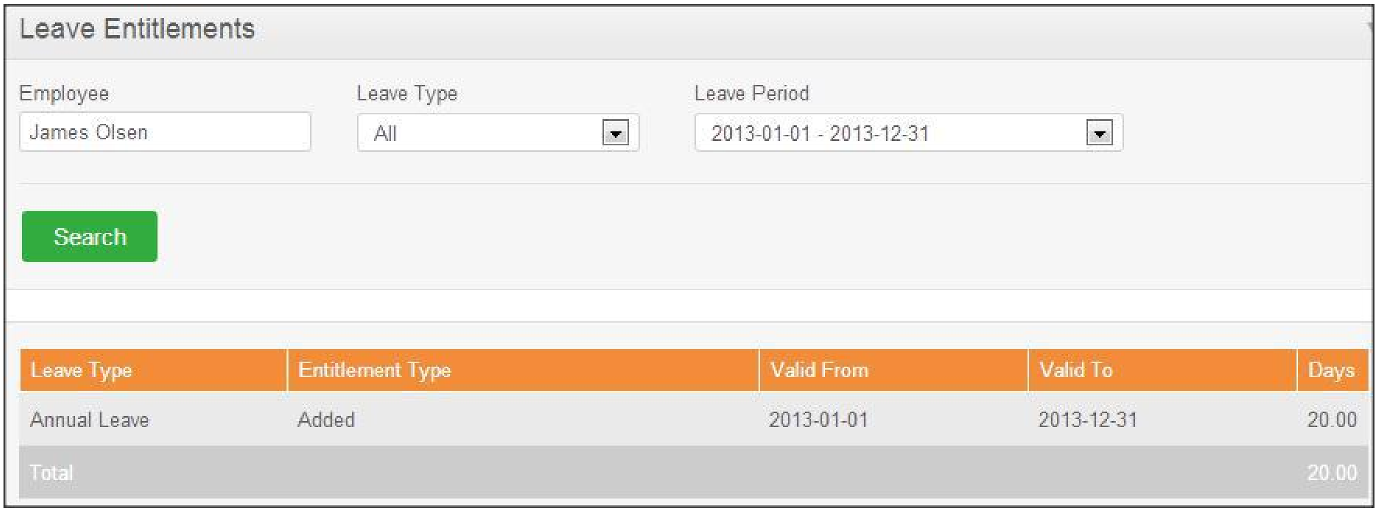


Figure 7.17: ESS-Supervisor View of Subordinate Entitlement

ESS-Employee View of Leave Entitlements

An ESS-Employee is only able to "View" his leave entitlement when he/she logs in. To view, go to **Leave>> Entitlements>> My Entitlements** and a screen as shown in Figure 7.18 will appear.

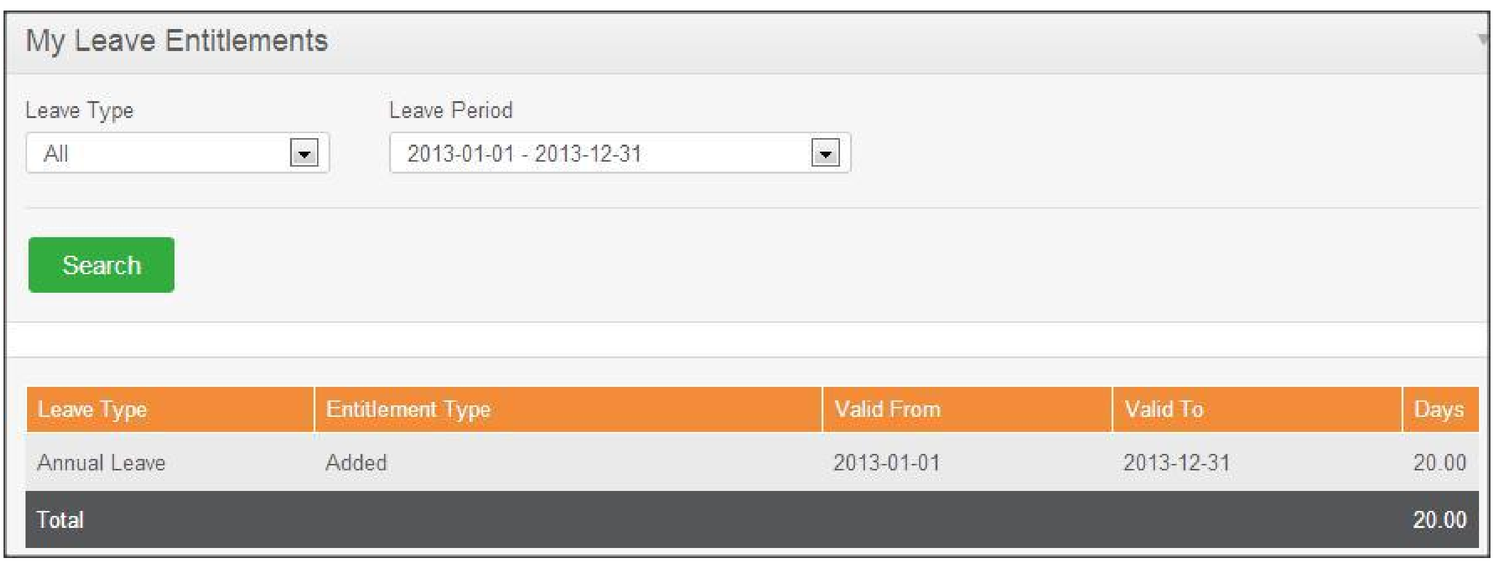


Figure 7.18: ESS-Employee View of Leave Entitlements

7.3 Reports

This feature allows users to generate Leave Entitlements and Usage Reports of employees.
The HR Admin can select between two main criteria when generating reports: “Leave Type” and “Employee”. (Figure 7.19).

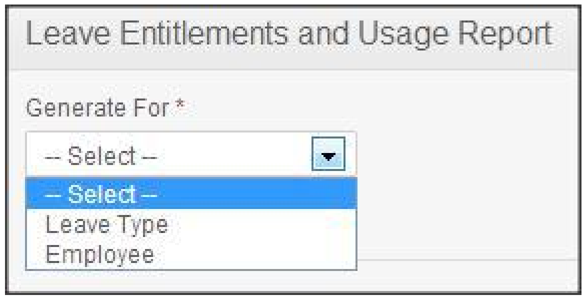


Figure 7.19: Generate Reports For

If the HR Admin selects “Leave Type”, he will then be presented with the following fields to select from (Figure 7.20).

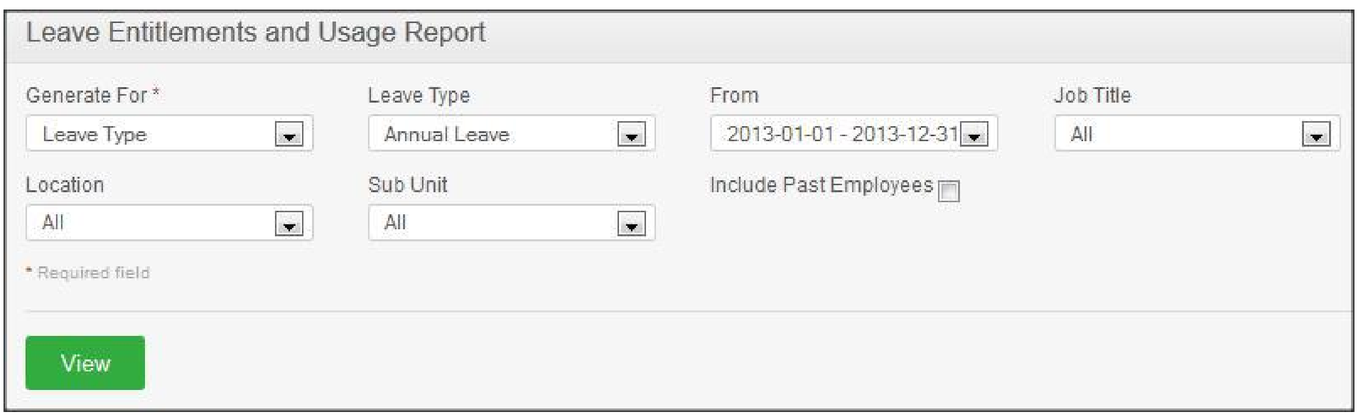


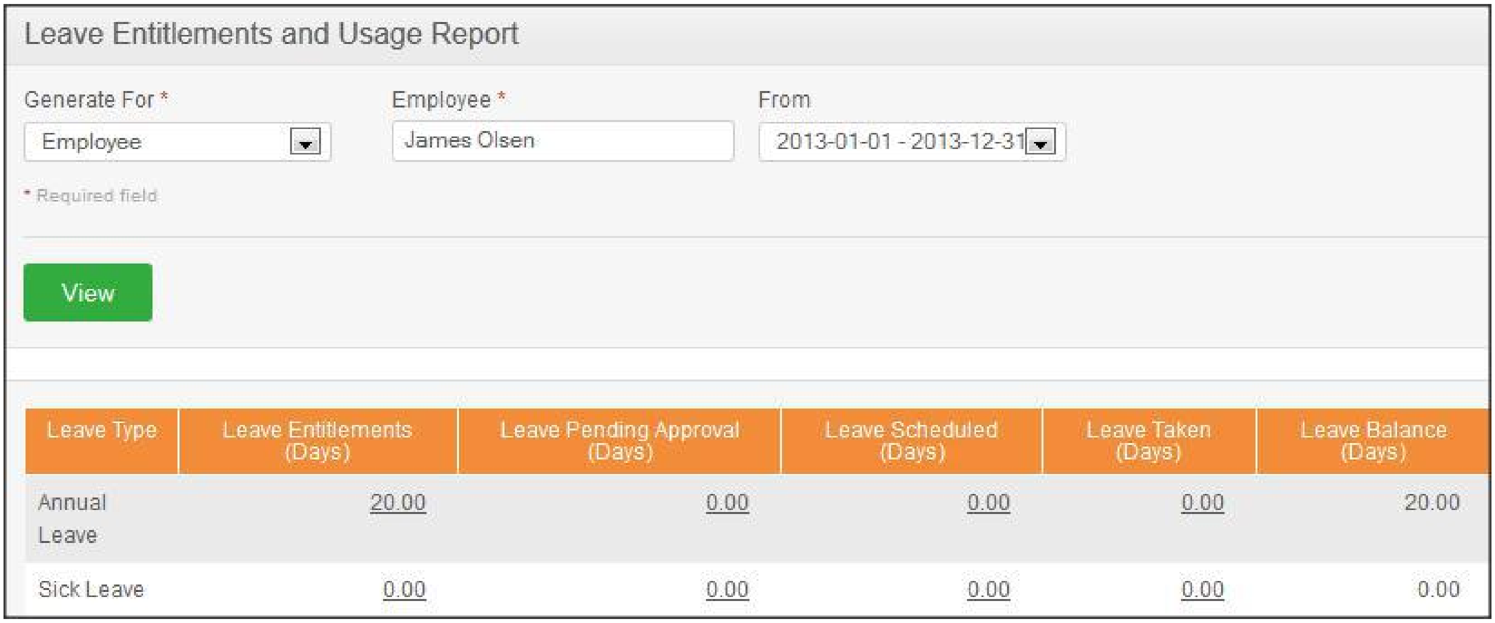
Figure 7.20: Leave Type Report Generation view

Once the appropriate fields are selected, the Admin can then click “View” and will be presented with the leave report of all employees based on the previously selected criteria (Figure 7.21)

Employee	Leave Entitlements (Days)	Leave Pending Approval (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days)
James Olsen	20.00	0.00	0.00	0.00	20.00
Kevin Ryan	20.00	2.33	1.00	3.00	13.67
John Smith	20.00	0.00	0.00	0.00	20.00

Figure 7.21 Employee Leave Report

If the “Employee” option is selected under “Generate For” (Figure 7.19) the HR Admin can generate the leave entitlement and usage report for any employee. The name of the employee will need to be inserted into the “Employee” filed, and a report will be generated for that employee (as shown in Figure 7.21).



Leave Type	Leave Entitlements (Days)	Leave Pending Approval (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days)
Annual Leave	20.00	0.00	0.00	0.00	20.00
Sick Leave	0.00	0.00	0.00	0.00	0.00

Figure 7.22: Leave Entitlements and Usage Report of a single employee

The Admin user can see view the Leave Entitlements and Usage Report of all employees, as well as himself/herself if he/she is also an employee. ESS –Supervisor users can view the Leave Entitlements and Usage Reports of only his/her subordinates, as well as for themselves (**Leave>>Reports>> My Leave Entitlements and Usage Report)**

If an employee is an Admin user or ESS Supervisor or then he/she will see an extra menu item under **Leave>>Reports** called **My Leave Entitlements and Usage Report (Figure 7.23)**

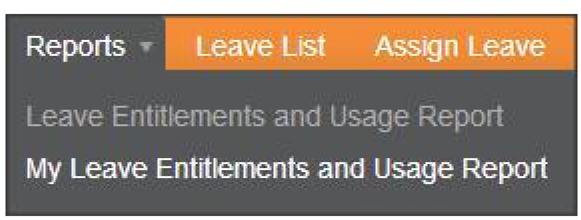


Figure 7.23: Admin Employee and ESS Supervisor menu view

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 7.24.

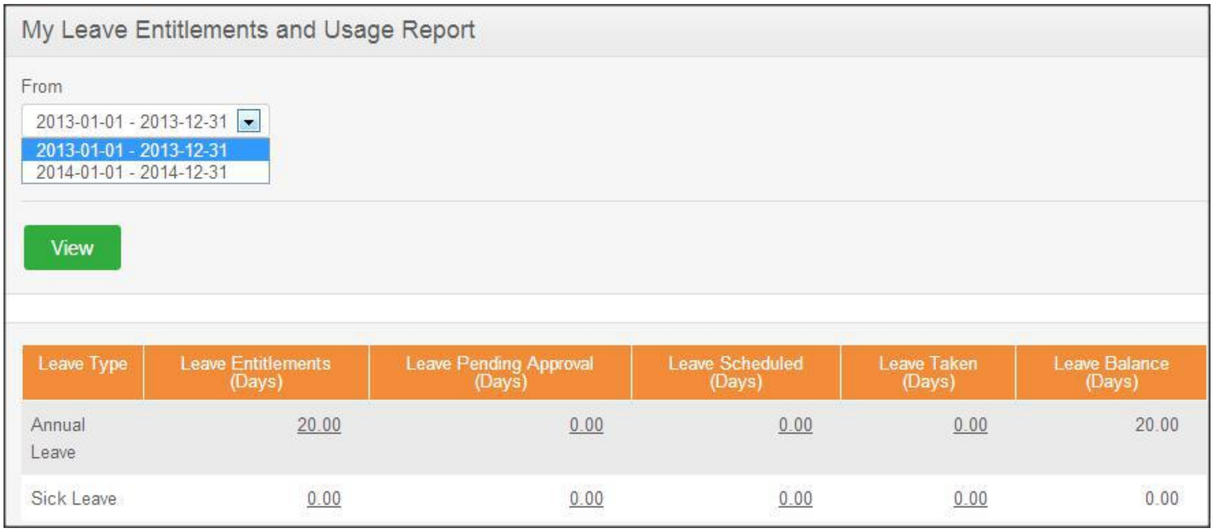


Figure 7.24: My Leave Entitlements and Usage Report

If the user is an ESS User, then he will see the following menu (Figure 7.25).

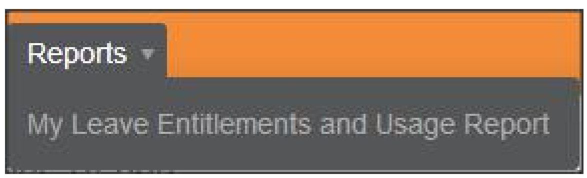


Figure 7.25: ESS User menu view

The ESS user can then select the “Leave Period” under the “From” dropdown menu and can then click on “View” (as shown in Figure 7.26).

Figure 7.26: My Leave Entitlements and Usage Report

7.4 Leave List

The leave list is available to the Admin and ESS – Supervisors. It shows the entire leave request by the employees.
*Note: The ESS – Supervisor will only see the leave list of his subordinates while the Admin can view the entire list.

View/Action Leave Request

When an employee applies for a leave his Supervisor (and Admin as well, if configured under Notifications) will receive a mail with a link to the leave list and upon clicking on that link either the Supervisor or the Admin can approve, reject or cancel the leave.

Alternatively, an HR Admin or an ESS-Supervisor may also log into the system and action the following leave requests.

To view "Leave List", go to **Leave>>Leave List** and the screen as shown in Figure 7.27 will appear. You may also action the following leave request by selecting an action from the "Action" drop down menu.

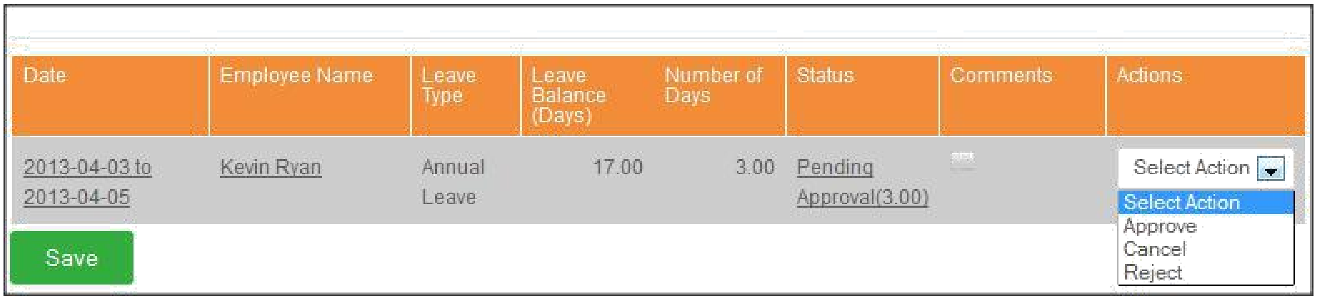


Figure 7.27: Admin/ESS Supervisor Leave List

Click "Save" once an action has been selected. The following leave request in which an action has been applied will no longer appear in the leave list as shown in Figure 7.28. A mail will be then sent to the employee and he can view the status of his leave application.

Figure 7.28: Leave Status Notified to Employee.

Alternatively, you may action the following leave request by selecting an action from the drop down menu of "Actions" or you may click the "Date" / "Status" to view the a detailed information of the leave request and action them individually as shown in Figure 7.29. Select necessary actions to the leave request and click "Save"

Figure 7.29: Leave Request in Detail

Once the necessary actions have been made to the leave requests, they will no longer appear in the leave list. A mail will be then sent to the employee and he can view the status of his leave application.

Search Leave List

You can view leave using the search toolbar as shown in Figure 7.30 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
- Search for the employee
- Search by Sub-Unit
- You may also include past employees with your search.

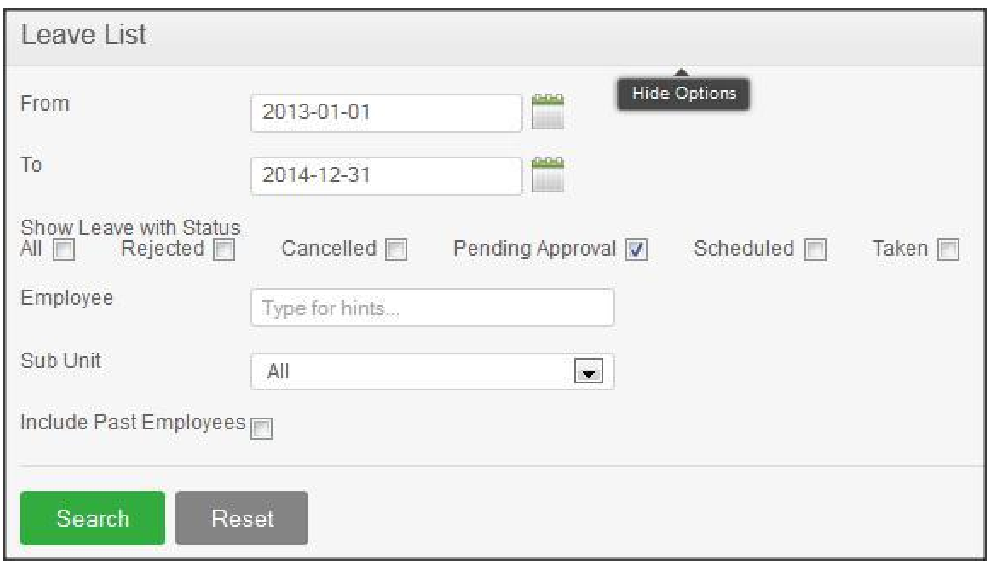


Figure 7.30: Leave List Search

7.5 Assign Leave

This feature is only available to an HR Admin and ESS-Supervisor. The HR Admin can assign leave to all employees while an ESS-Supervisor can only assign leave to his subordinates. To assign leave, go to **Leave>> Assign Leave** and the screen as shown in Figure 7.31 will appear.

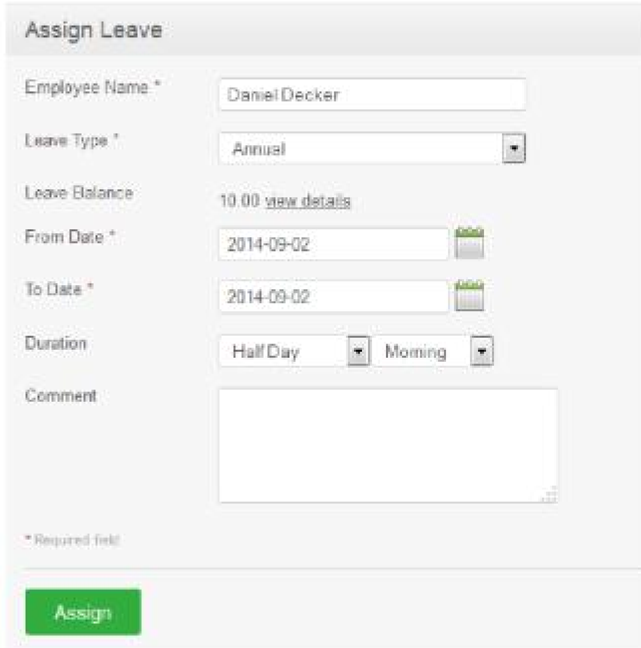
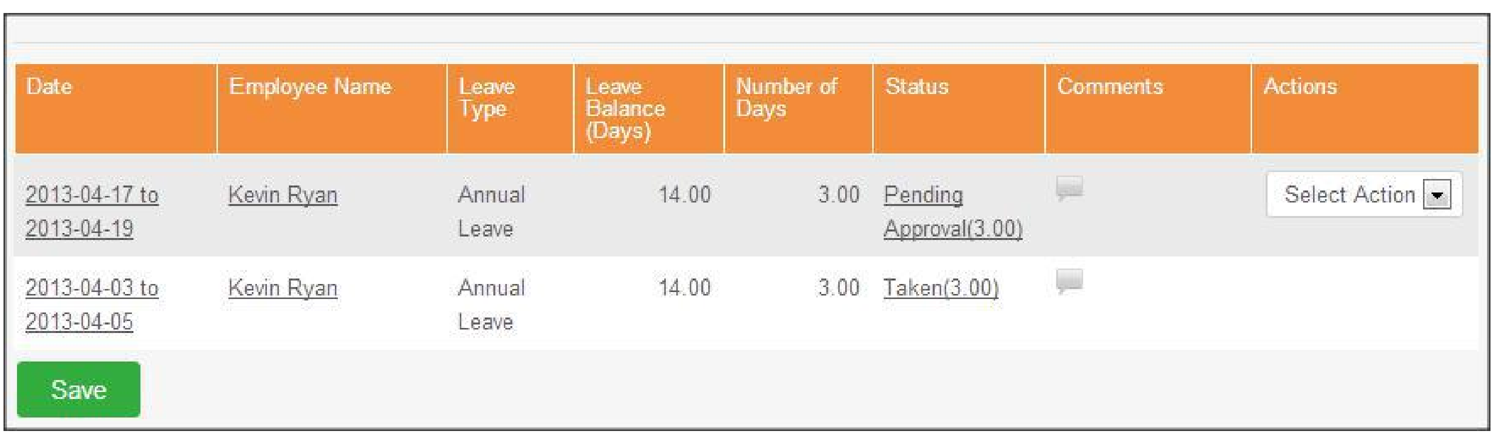


Figure 7.31: Assign Leave

Select the name of the employee, you can do this by entering the first letter of his name and you will see list of employees with that letter and you can select the relevant employee, then select the leave type, the dates in which the leave is to be taken (range of days), the duration which allows to apply for half day or partial day leave and also you can add a comment if necessary. The system also shows the remaining leave balance for the specific leave type.

Click "Assign" when you are done and the employee and the admin will be notified via e-mail. The leave balance will also be deducted.

When the employee logs in to the system and checks his/her leave by going to **Leave>> My Leave**, he/she will see the leave that was assigned to him/her as shown in Figure 7.32.



Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
2013-04-17 to 2013-04-19	Kevin Ryan	Annual Leave	14.00	3.00	Pending Approval(3.00)		Select Action
2013-04-03 to 2013-04-05	Kevin Ryan	Annual Leave	14.00	3.00	Taken(3.00)		

Save

Figure 7.32: ESS-Employee "My Leave" View

7.6 My Leave

This menu item is available for ESS Users and ESS Supervisors. Personal leave details can be viewed here. To view "My Leave" go to **Leave>> My Leave** and the screen as shown in Figure 7.33 will appear.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
2013-04-17 to 2013-04-19	Kevin Ryan	Annual Leave	14.00	3.00	Pending Approval(3.00)		Select Action
2013-04-03 to 2013-04-05	Kevin Ryan	Annual Leave	14.00	3.00	Taken(3.00)		

Save

Figure 7.33: My Leave View

An employee can choose to cancel a pending approval leave or a scheduled leave however he cannot make any changes to any other leave status.

He/she can view complete details of leaves by clicking on the "Date" or "Status". To cancel a leave request click on the "Actions" drop down, select "Cancel" and click "Save".

If the email notifications functionality has been configured , email notifications on leave application, cancellations, rejections and approvals will be sent to the employee who has applied for leave, as well as to the Admin Users who have subscribed for the leave management mail notifications.

7.7 Apply

All users except for the Admin unless he is an employee can apply leave from this option. To apply for a leave go to **Leave>>Apply** and the screen shown as shown in Figure 7.34 will appear.

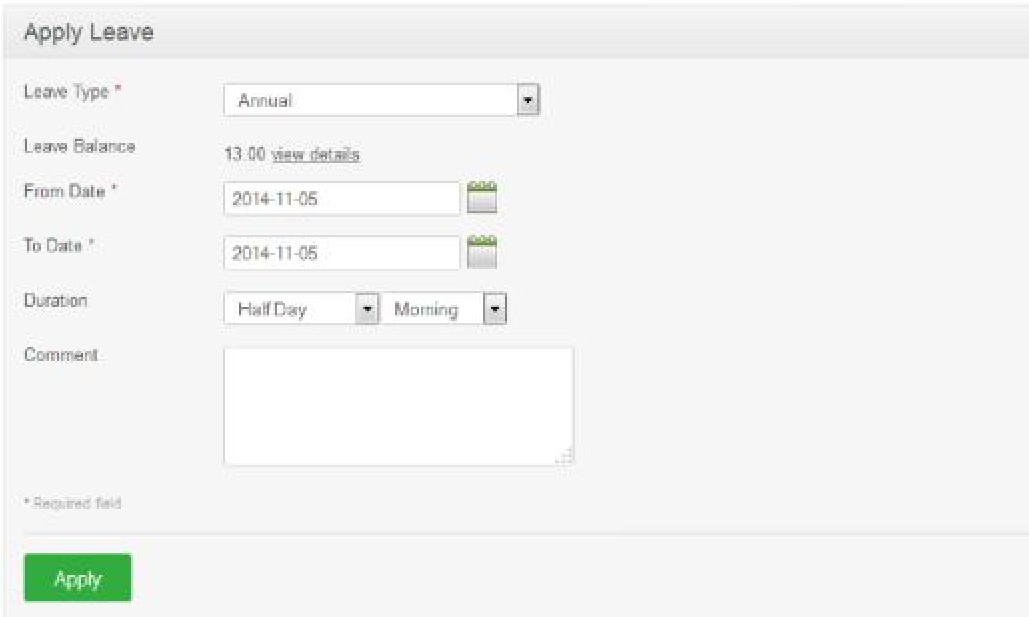
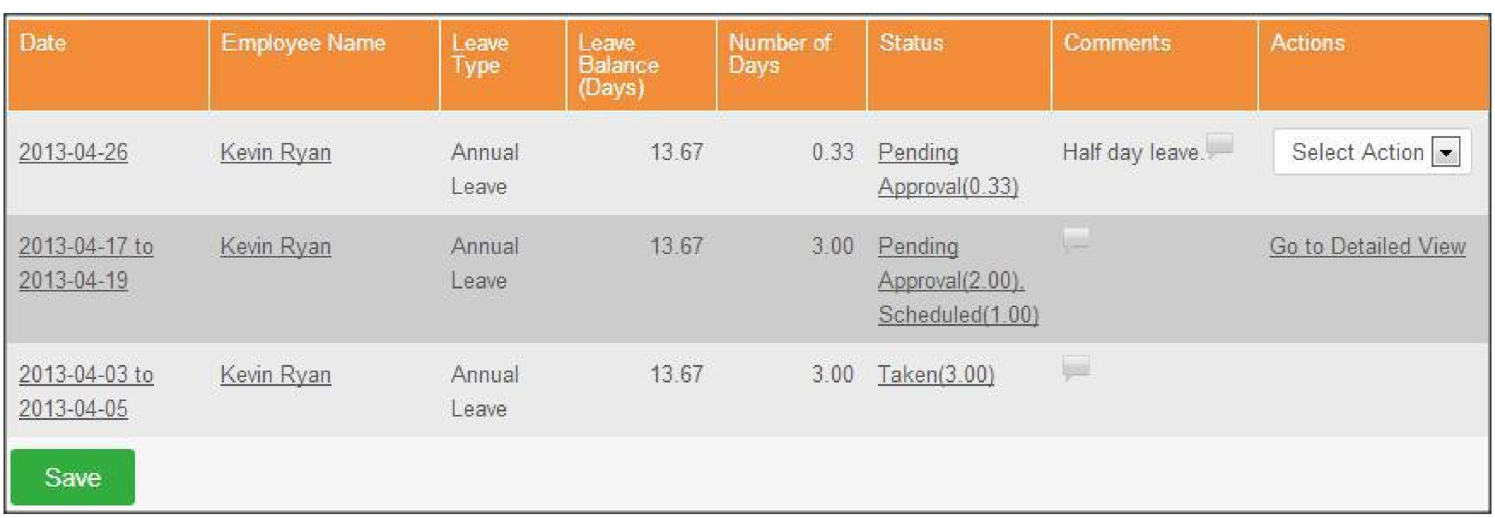


Figure 7.34: Apply Leave

Select the leave type from the drop down menu and the “From Date” and “To Date” you prefer the leave to be taken, either you can select range of days or same day, if it is for the same day, the duration field will be enabled, which allows you to apply for half day or partial day leave (morning or afternoon) and also you can add a comment on why you need the leave if necessary. The system also shows the remaining leave balance for the specific leave type.

Once you have filled in the details click “Apply” and a mail will be sent to the Supervisor (as well as the Admin, if configured under Notifications) for approval. The status of your leave application can be seen in “My Leave” as shown in Figure 7.35.



Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
2013-04-26	Kevin Ryan	Annual Leave	13.67	0.33	Pending Approval(0.33)	Half day leave.	Select Action
2013-04-17 to 2013-04-19	Kevin Ryan	Annual Leave	13.67	3.00	Pending Approval(2.00), Scheduled(1.00)		Go to Detailed View
2013-04-03 to 2013-04-05	Kevin Ryan	Annual Leave	13.67	3.00	Taken(3.00)		

Save

Figure 7.35: My Leave View

8.0 Time Module

The Time Module automates attendance maintenance and punch in/out. The functionality of the module allows the employees of the company to create and submit weekly timesheets and the Supervisors to modify, approve and reject the timesheets. These timesheets are created based on Activities within Projects that are being done for various Customers.

While attendance is tracked through punch in/out employees can specify the time spent of projects assigned to them.

Depending on each user the functions vary:

The Admin can:

- Add Project Information; Customers, Projects and Activities
- View / Edit / Approve / Reject Employee Timesheets
- View any employee's attendance records
- Configure attendance settings for all employees
- View project reports for any project undertaken by the company

The ESS–Supervisor can:

- View project information, and view/edit/add project activities if he/she is the project admin.
- Enter, modify and submit personal timesheets
- View / Edit / Approve / Reject/Add timesheets of his subordinates
- Enter his/her punch in/out time
- Enter time events spent on the project activities
- View his subordinates' employee attendance records.
- View subordinate's project reports and attendance summary.

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

8.1 Time Sheets

Project Info; Customers, Projects and Activities

Here information regarding projects, customers, project activities and project administrator can be defined, which can be later used for project management activities.

Customers

You can enter details of your customers that can be used to define projects and project activities. To add a customer, go to **Time>> Project Info>> Customers** and click "Add", a screen as shown in Figure 8.1 would appear.

Click "Save" once the fields are added.

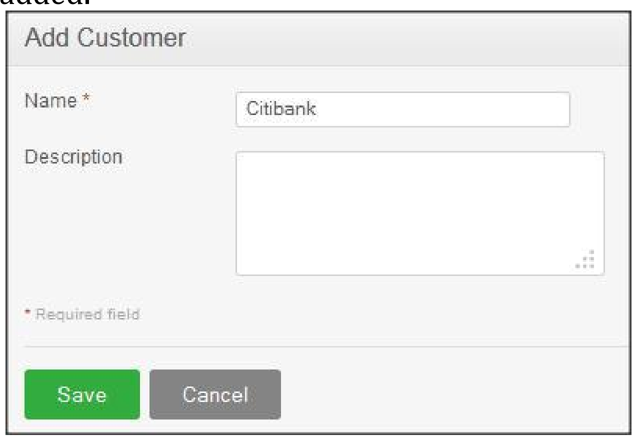


Figure 8.1: Add Customer

The customer will then be listed as shown in Figure 8.2. You may also add multiple entries of customers. To view details of a customer, click on the customer's name.

Figure 8.2: Customers List

To delete an entry, click on the check box next to the "Customer" 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".

Projects

The administrators are able to define the projects, which were/are/will be managed by the company. To add a project, go to **Time>> Project Info>> Projects** and click “Add”, a screen as shown in Figure 8.3 would appear.

Click “Save” once the fields are added.

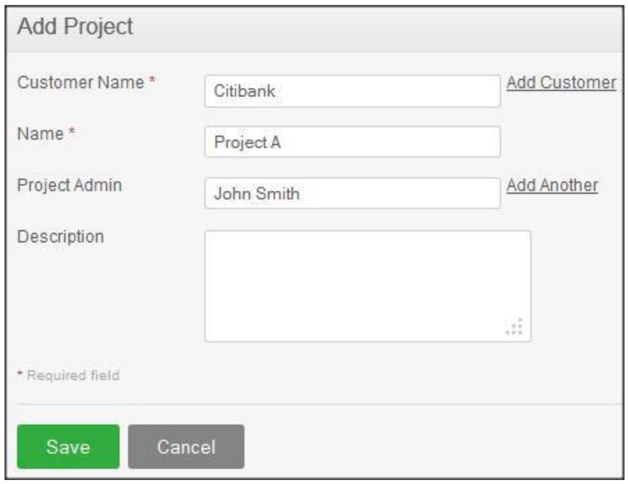


Figure 8.3: Add Project

To add a project, the following needs to be entered:

- **Customer Name**: needs to be defined first before adding a project name or you may simply add a customer by clicking on “Add Customer” below the “Customer Name” field.
- **Name**: Name of the project to be done for the customer
- **Project Admin**: The employee assigned for the project. You may assign more employees for the project.
- **Description**: A brief description of the project.

Once you click “Save” the screen as shown in Figure 8.4 would appear and project activities can be added for the particular project. To add a project activity, Click “Add” and “Save” once the field is added.

Figure 8.4: Add Project Activities

You may also copy a project activity from another project using the “Copy From” option. To copy a project activity from another project, click “Copy From”, fill in the desired Project name that you wish to copy an activity from, select the required Activity from the list, and then add the activity that needs to be copied by clicking on “Copy” as shown in Figure 8.5.

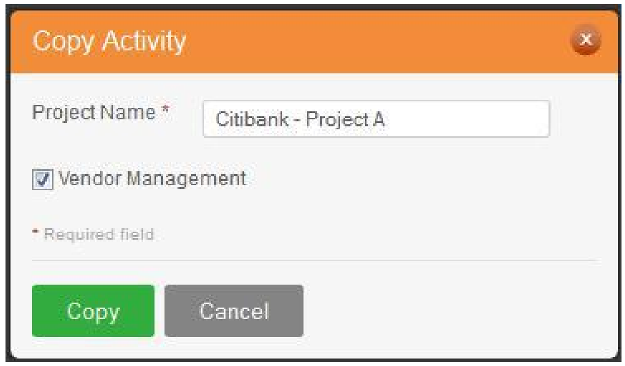


Figure 8.5: Copy Project Activity

The selected project activity will then be added to the list of project activities as shown in Figure 13.6.

Figure 8.6: Copied Project Activity Listed

A list of projects for a particular customer will then be listed as shown in Figure 8.7. You may also add multiple entries of projects. To delete an entry, click on the check box next to the “Customer” 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”.

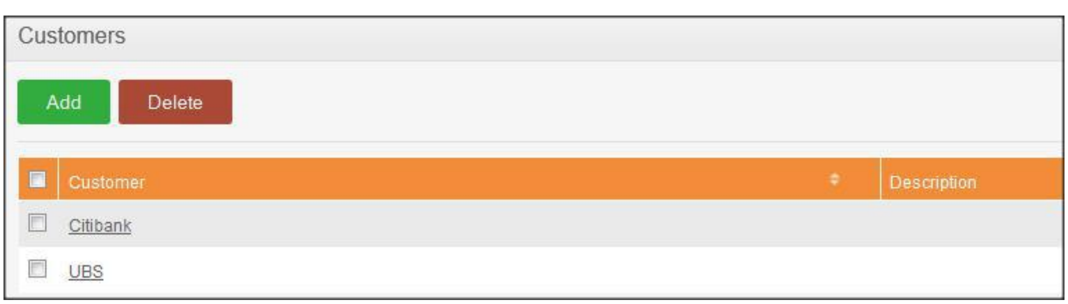


Figure 8.7: Project List

Entering and Submitting a Timesheet

This feature functions in different ways depending on the user type. The Admin will be able to view timesheets of employees while a Supervisor can also do the same and in addition, can enter his timesheet details however, a normal ESS User can only enter his timesheet details.

When an ESS-Employee or an ESS-Supervisor wants to enter his/her timesheet, they can go to **Time>> Timesheet>> My Timesheets** and the screen as shown in Figure 8.8 will appear. This option is not available to the Admin.

Figure 8.8: 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.

*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.

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 8.9 will appear.

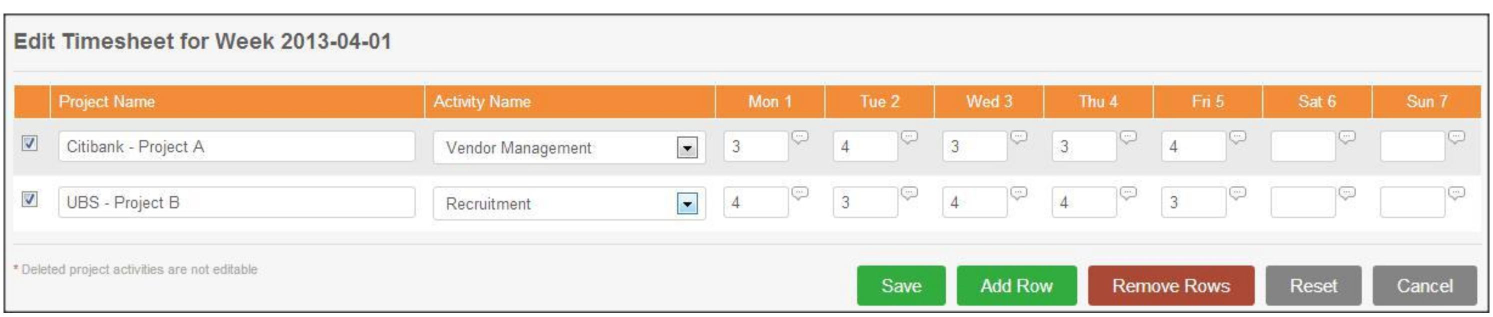


Figure 8.9: Edit Timesheet

*Note: Project Info needs to be defined first to enable employees to add a timesheet for the projects he/she was assigned to.

They can select from the “Project Name” and “Activity Name” that was assigned to him/her and enter the number of hours 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 checkbox beside the project name before you click “Save” to save the following records and the screen as shown in Figure 8.10 will appear.

Figure 8.10: 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 8.11 will appear. Click on the checkbox for the particular row you want removed and click “Remove Rows” and the record will no longer appear on the timesheet record.

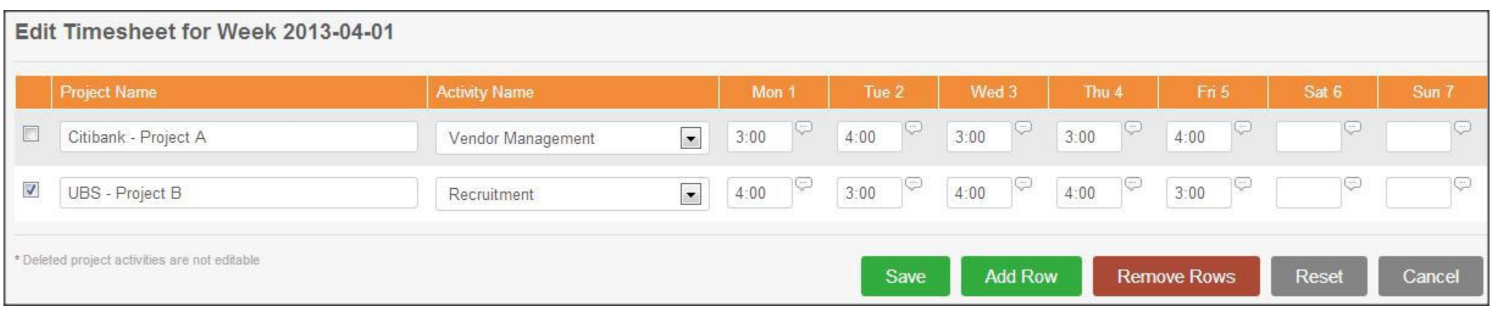


Figure 8.11: Remove Rows

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 8.12

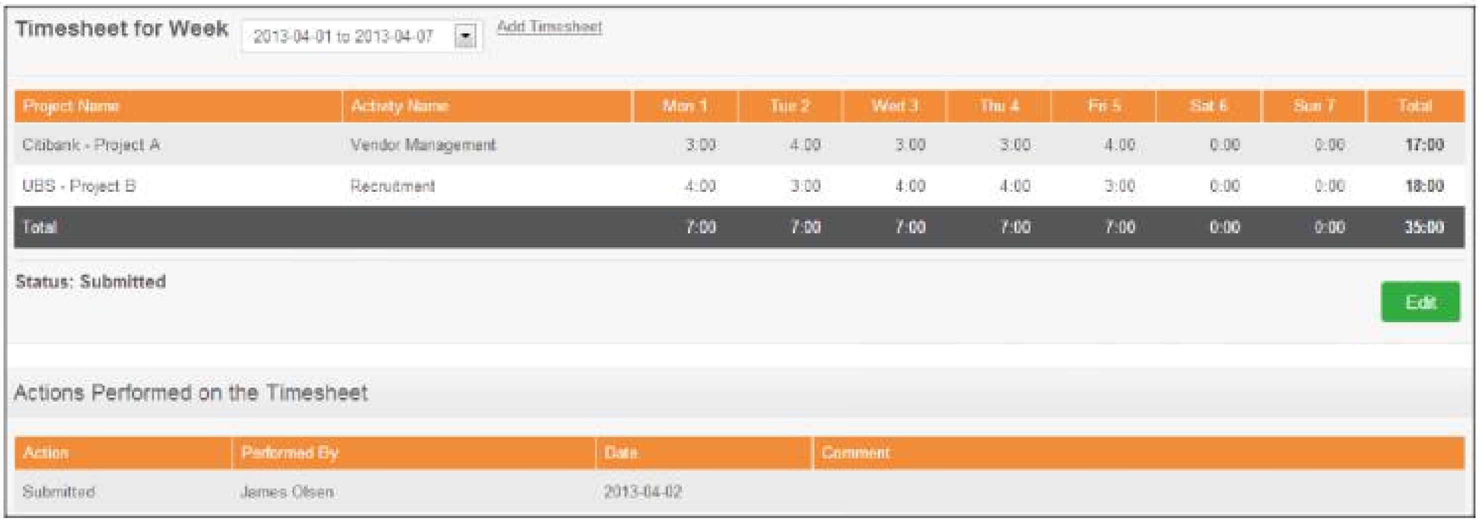


Figure 8.12: Submit Timesheet

The action performed by the user on the timesheet will appear below the screen indication the "Action" performed, who it was "Performed By" and the "Date" it was performed.

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 his/her supervisor.

Approving Employee Timesheet

ESS-Supervisor Approve/Reject Timesheet

When an employee submits a time sheet it will be sent to his supervisor. The supervisor will see the submitted timesheets by going to **Time>> Timesheets>> Employee Timesheets** and the screen as shown in Figure 8.13 will appear. The ESS-Supervisor will only see the timesheets submitted by his/her subordinate.

Figure 8.13: ESS Supervisor View Timesheet Details

The supervisor may search and view employee's timesheet through the "Select Employee" and by entering the employee name and clicking "View".

Timesheet with pending action can also be viewed on the screen. Click "View" to see the details of the timesheet under "Timesheets Pending Action" and the screen as shown in Figure 8.14 will appear.

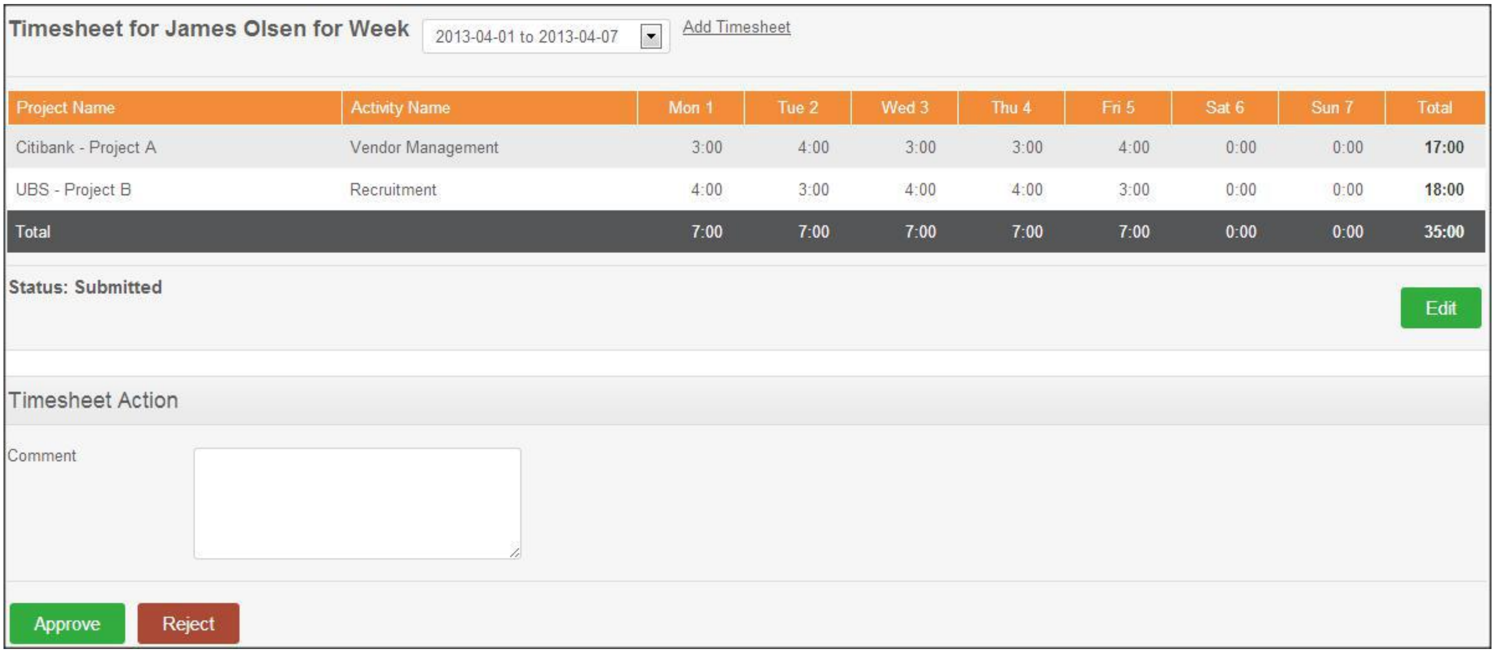


Figure 8.14: ESS-Supervisor View/Edit/Approve/Reject Timesheet

The supervisor can approve or reject a timesheet and also enter a comment. They can also edit the timesheet by clicking "Edit", if there are any discrepancies before approving or rejecting the timesheet.

Once approved or rejected the particular employee will also be updated with the status and the status will change from "Submitted" to either "Approved" or "Rejected". The action performed by the supervisor will then be listed under "Actions Performed on the Timesheet" as shown in Figure 8.15.

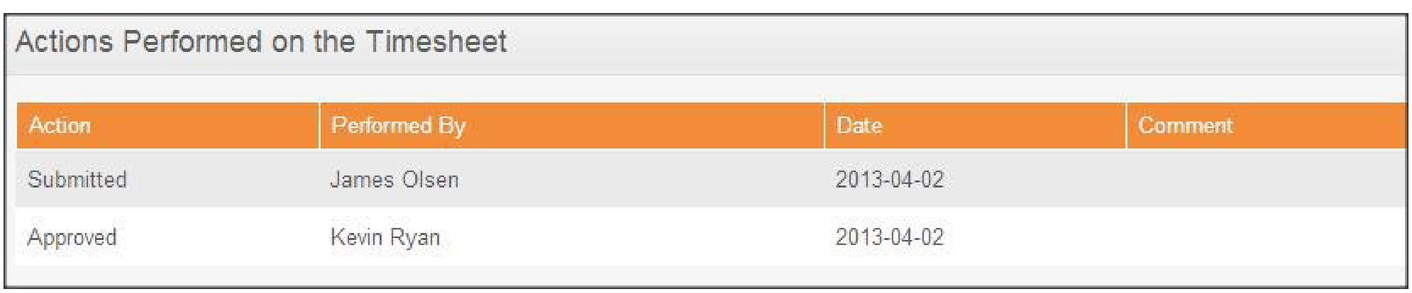


Figure 8.15: Actions Performed on the Timesheet by ESS-Supervisor

HR Admin Approve/Reject Employee Timesheet

The HR Admin can view all employees' timesheet. When an employee submits a time sheet, the HR Admin and other users with admin rights can also View / Edit / Approve / Reject an Employee Timesheets. To action an employee timesheet, go to **Time>> Time Sheets>> Employee Time sheets** and the screen as shown in Figure 8.16 will appear.

Figure 8.16: HR Admin View Timesheet Details

The HR Admin may search and view employee's timesheet through the "Select Employee" box and by entering the employee name and clicking "View".

Timesheets with pending action can also be viewed on the screen. Click "View" to see the details of the each timesheet under "Timesheets Pending Action" and the screen as shown in Figure 8.17 will appear.

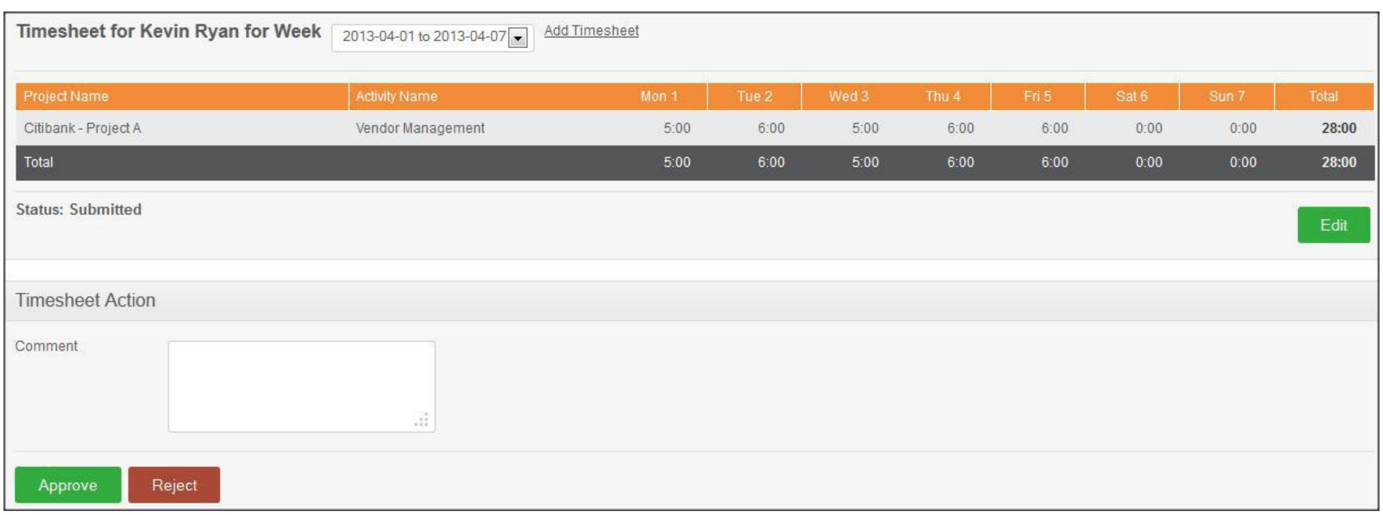


Figure 8.17: HR Admin View/Edit/Approve/Reject Timesheet

The HR Admin can approve or reject a timesheet and also enter a comment. They can also edit the timesheet by clicking “Edit”, if there are any discrepancies before approving or rejecting the timesheet.

Once approved or rejected the particular employee will also be updated with the status and the status will change from “Submitted” to either “Approved” or “Rejected”. The action performed by the HR Admin will then be listed under “Actions Performed on the Timesheet” as shown in Figure 8.18.

Actions Performed on the Timesheet

Action	Performed By	Date	Comment
Submitted	Kevin Ryan	2013-04-02	
Approved	Admin	2013-04-02	

Figure 8.18: Actions Performed on the Timesheet by HR Admin

8.2 Attendance

All attendance records are maintained and recorded under “Attendance” menu. Depending on the user, the attendance functions vary.

The Admin can:

- Generate project, attendance and employee reports for all the employees
- Configure user rights with regards to attendance

The ESS – Supervisor can:

- Punch In/Out
- View personal reports
- Generate project, attendance and employee reports for subordinates

The ESS User can:

- Punch In/Out
- View personal time reports.

Configuration

The admin can select what privileges the employees and supervisors will have on the punch in/out and attendance. For configuration, go to **Time>> Attendance>> Configuration** and the screen as shown in Figure 8.19 will appear.

Click "Save" once done.

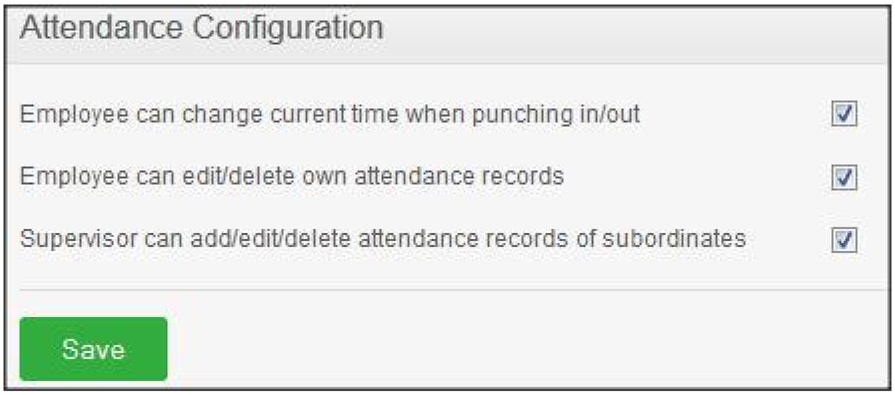


Figure 8.19: Attendance Configuration

Punch In/Punch Out

This feature allows capturing the number of hours an employee spends working for the company. This feature is only available to the ESS – Supervisor and ESS User. To access the Punch In/Out tab, go to **Time>> Attendance>>Punch In/Out** and the screen as shown in Figure 8.20 will appear.

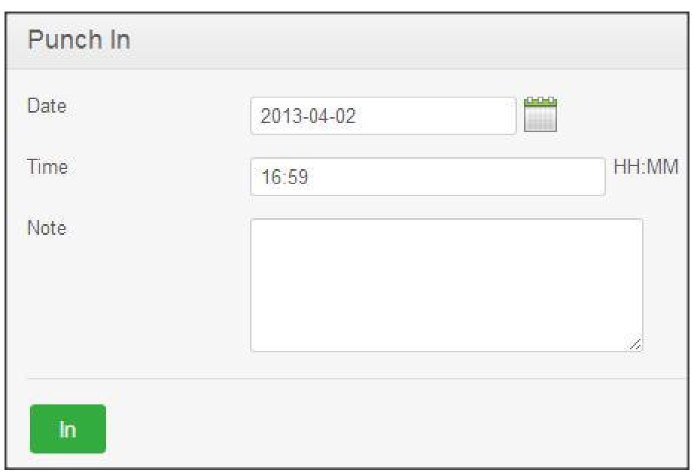


Figure 8.20: Punch In

If the HR Admin has configured the attendance settings, the “Time” for both punch in/out could be changed otherwise the system will automatically capture the “system time”.

Once you click “In” the screen as shown in Figure 8.21 will appear. To punch out, click “Out”.

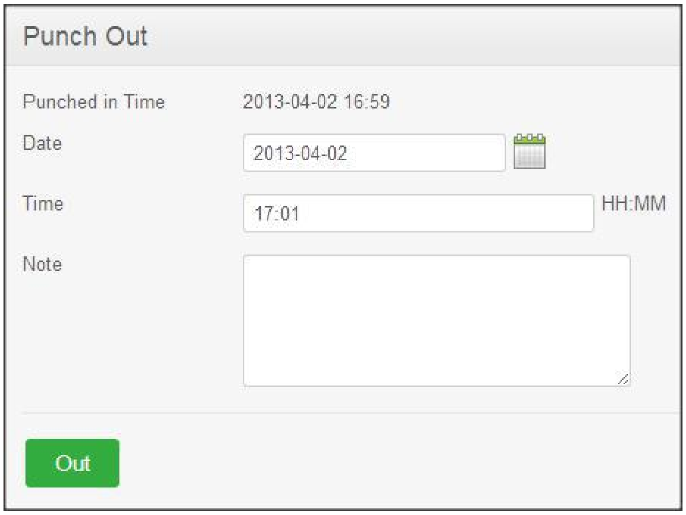


Figure 8.21: Punch Out

My Records

This feature is available to both ESS-Employee and ESS-Supervisor. Once you have punched in and punched out, the details of your personal attendance record will be shown under “My Records”. To view details, go to **Time>> Attendance>> My Records** and the screen as shown in Figure 8.22 will appear.

Figure 8.22: View My Records

Enter the date you want to view the attendance record and the screen as shown in Figure 8.23 will appear.

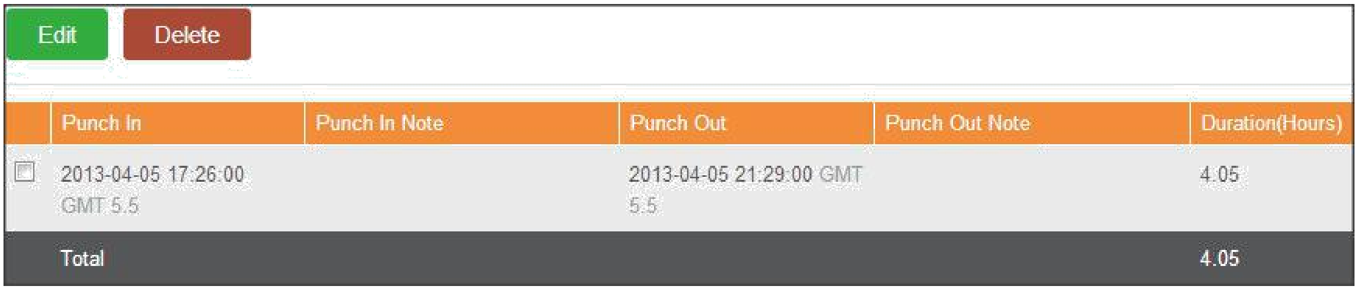


Figure 8.23: "My Records" in Details

If the HR Admin has configured the attendance settings the following options: "Edit" and "Delete could be seen and selected. To edit the record, click "Edit" and to delete the record, click on the checkbox beside the record and click "Delete".

Employee Records

This feature is available to both ESS-Supervisor (can view his/her subordinates attendance records) and HR Admin (can view all employees attendance records).

To view employee records, go to **Time>> Attendance>> Employee Records** and the screen as shown in Figure 8.24 will appear.

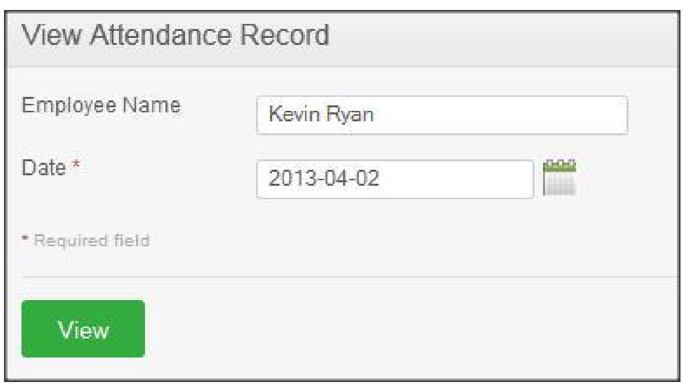


Figure 8.24: View Employee Records

You may enter the "Employee Name" and the "Date" you want to view the attendance record for and the screen as shown in Figure 8.25 will appear.

Figure 8.25: Employee Record in Detail

If the HR Admin has configured the attendance settings the following options: “Edit”, “Delete” and “Add Attendance Record” could be seen and selected. To edit the record, click “Edit”; enter the appropriate data and click “Save”.

To delete the record, click on the checkbox beside the record and click “Delete”.
To add another attendance record, click “Add Attendance Records” and enter the appropriate details.

*Note: To add another attendance record, click on the “Add Attendance Records” twice; once to punch in and once again to punch out.

8.3 Reports

This feature is only available to both an ESS – Supervisor and the HR Admin. They can view the following in details:

- Project Report
- Employee Report
- Attendance Summary

Project Report

This feature is available to the Admin and ESS – Supervisors. The Admin can view can reports for all projects and the ESS – Supervisors can view reports of projects administered by them or projects assigned to them. To view project reports go to **Time>> Reports>> Project Reports** and the screen as shown in Figure 8.26 will appear.

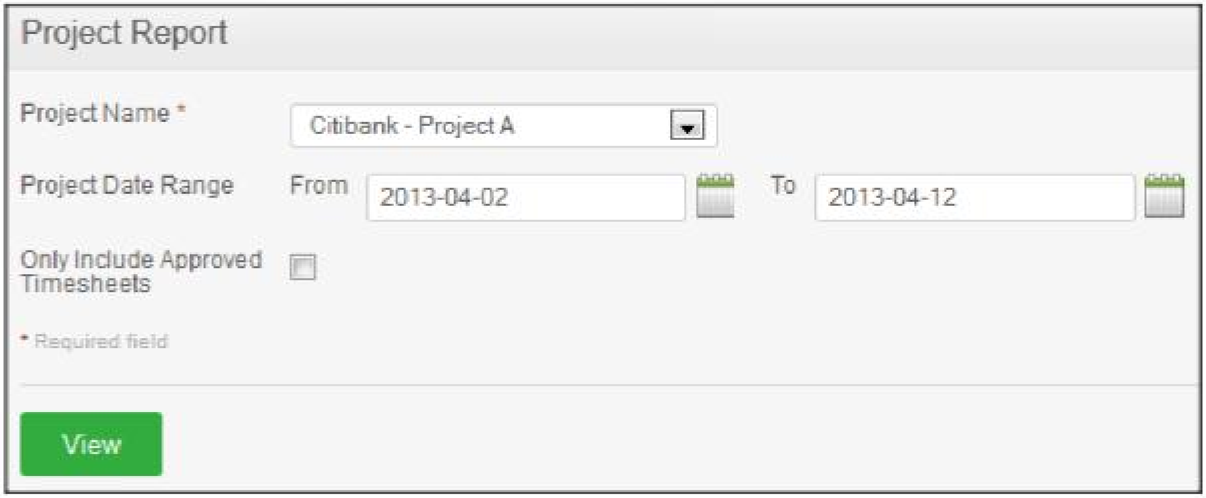


Figure 8.26: View Project Report

Select the "Project Name" from the drop down menu and the "Project Date Range" by selecting the dates. The default project name is "All". You may also click on the "Only Include Approved Timesheets" if you want to view only projects reports with approved timesheets. Click "View" once completed and the screen as shown in Figure 8.27 will appear.

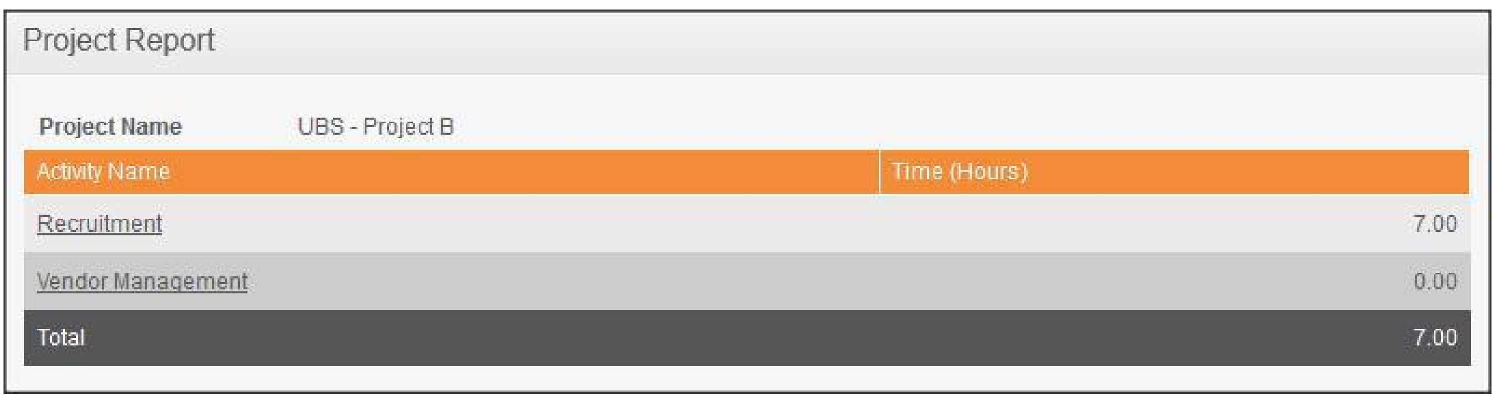


Figure 8.27: Project Report

Employee Reports

These reports are available to both HR Admin and ESS-Supervisor. The Admin can view can reports of all projects that all employees have been assigned to and the ESS – Supervisors can view reports of projects that his subordinates were assigned to. Here the Admin and ESS -Supervisor can track the time employees spent on particular activities.

To view an employee report, go to **Time>> Reports>>Employee Reports** and the screen as shown in Figure 8.28 will appear

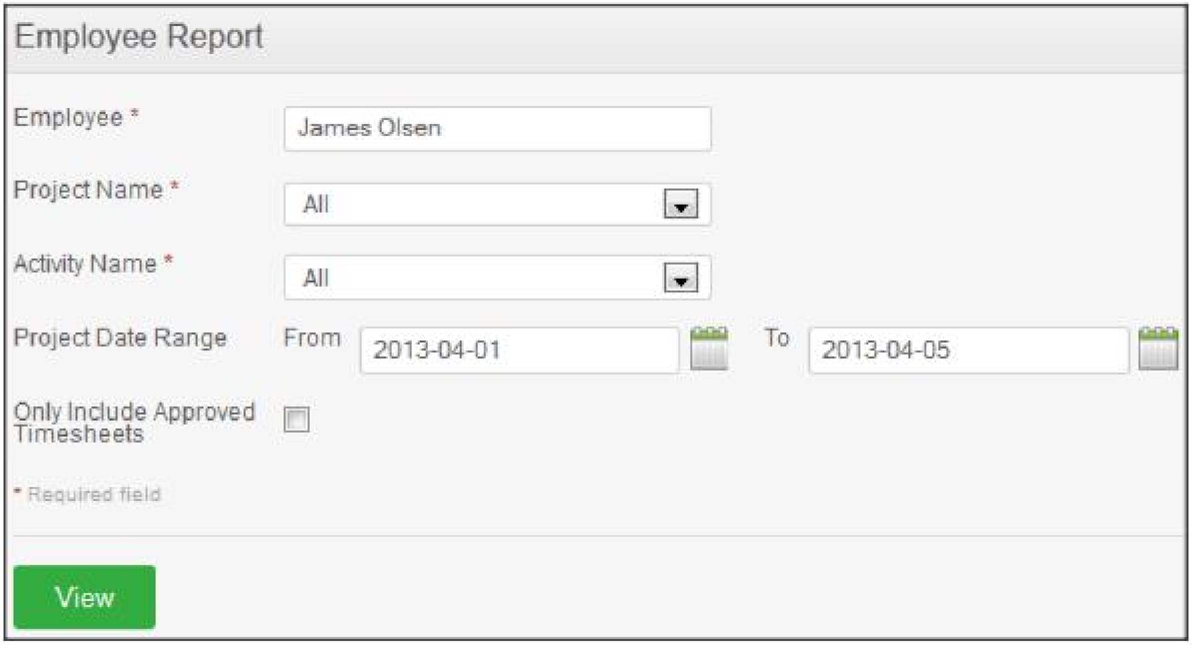


Figure 8.28: View Employee Report

Select the "Employee Name" from the drop down list, the "Project Name" he/she was assigned to and the "Activity Name "he/she took part in and define the "Project Date Range by selecting from the dates. The default project name and project activity is "All". You may also click on the "Only Include Approved Timesheets" if you want to view only employee reports with approved timesheets.

Click "View" once completed and the screen as shown in Figure 8.29.

Employee Report

Employee Name James Olsen

Project Name	Activity Name	Time (Hours)
Citibank - Project A	Vendor Management	17.00
UBS - Project B	Recruitment	18.00
Total		35.00

Figure 8.29: Employee Report

Attendance Summary

These reports are available to both HR Admin and ESS-Supervisor. The Admin can view can the attendance summary of all employees while an ESS – Supervisors can view the attendance summary of his/her subordinates. Here the Admin and ESS -Supervisor can track the time employees have spent working in the company.

To view an employee's attendance summary, go to **Time>> Reports>>Attendance Summary** and the screen as shown in Figure 8.30 will appear.

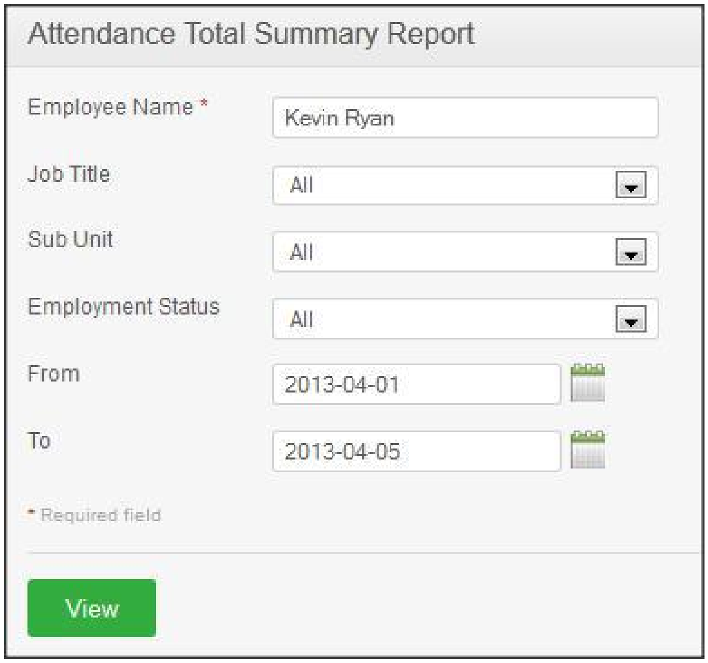


Figure 8.30: View Attendance Summary Report

Select the "Employee Name" from the drop down list, his/her "Job Title" and "Sub- Unit" he/she falls under and his/her "Employment Status". The default job title/sub-unit/employment status is "All". You may also select the date range you want to view the report for. Click "View" and the screen as shown in Figure 8.31 will appear.

Figure 8.31: Attendance Summary Report

9.0 Recruitment Module

The Recruitment Module manages the recruitment process of a company. The Admin can create Vacancies which will be listed on the link via **jobs.php**. A link has to be made on the website to take the applicant to **jobs.php**. Successful applicants are added to the system.

9.1 Candidates

Here the Admin can view the overall status of employee's applications and search for candidates using the criteria provided. To perform a candidate search go to Recruitment Module>> Candidates and the screen as shown in Figure 9.1 will appear.

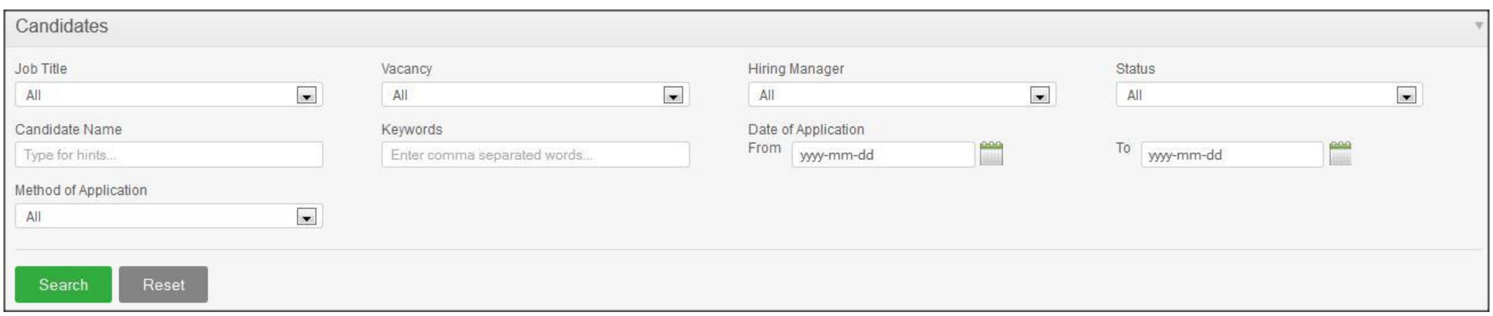


Figure 9.1: Candidates

- Job Title: search for the candidates who have applied for a specific job title that may not be necessarily posted.

- Vacancy: search for the candidates who have applied for a vacancy posted on the website.

- Hiring Manager: search for candidates with interviews with a particular hiring managers.

- Candidate Name: search for a particular candidate

- Keywords: search for candidates using specific keywords that the candidates may have entered on the application form for easy short-listing for a particular vacancy.

- Status: search for candidate with the following status of the application:

    - ➢ Application Initiated
    - ➢ Shortlisted
    - ➢ Interview Scheduled
    - ➢ Interview Passed

- ➢ Interview Failed
- ➢ Job Offered
- ➢ Offer Declined
- ➢ Rejected
- ➢ Hired

Method of Application: search for candidates who have applied for any vacancy via:

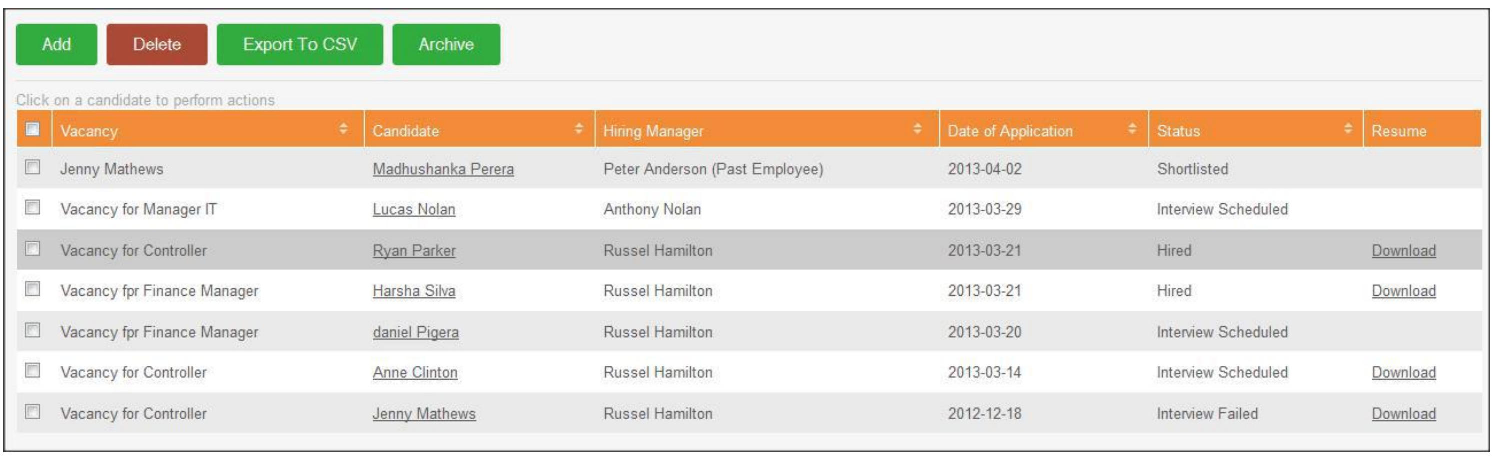
- ➢ Manual: through post/email
- ➢ Online: through the job portal

Date of Application: search for candidates who have applied for a specific period of time .Select the dates from “From” to ‘To”.

Click ‘Search” to perform the candidate search.

Candidates List

Once a candidate applies for a particular vacancy that is posted online, they will be populated on the database under the Recruitment Module. To view candidates list, go to Recruitment >>Candidates and the screen as shown in Figure 9.2 will appear.



	Vacancy	Candidate	Hiring Manager	Date of Application	Status	Resume
	Jenny Mathews	Madhushanka Perera	Peter Anderson (Past Employee)	2013-04-02	Shortlisted	
	Vacancy for Manager IT	Lucas Nolan	Anthony Nolan	2013-03-29	Interview Scheduled	
	Vacancy for Controller	Ryan Parker	Russel Hamilton	2013-03-21	Hired	Download
	Vacancy fpr Finance Manager	Harsha Silva	Russel Hamilton	2013-03-21	Hired	Download
	Vacancy fpr Finance Manager	daniel Pigera	Russel Hamilton	2013-03-20	Interview Scheduled	
	Vacancy for Controller	Anne Clinton	Russel Hamilton	2013-03-14	Interview Scheduled	Download
	Vacancy for Controller	Jenny Mathews	Russel Hamilton	2012-12-18	Interview Failed	Download

Figure 9.2: Candidates List

To view candidate’s application status details and perform an action click on the “Candidate” name and the screen as shown in Figure 9.3 will appear. Click “Edit” to select perform an action.

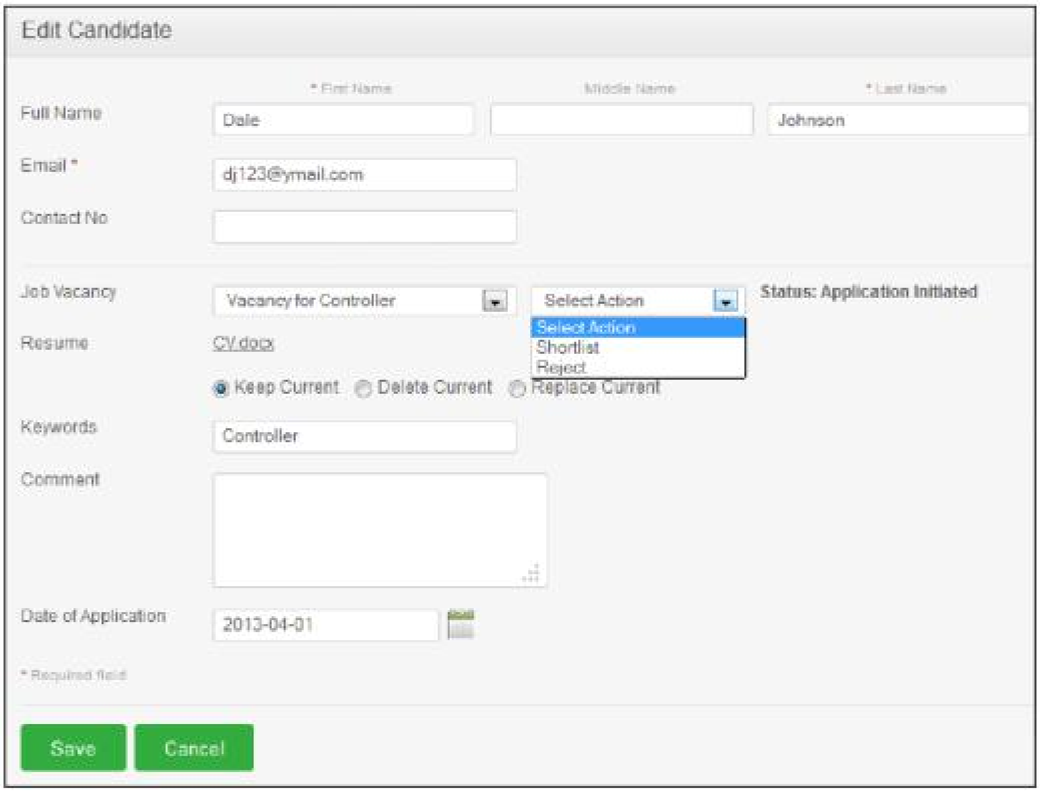


Figure 9.3: Candidate's Application Status Details

The following information will be populated on the screen:

- Full Name
- Email
- Contact No.
- Job Vacancy
- Status : You may select if you want to shortlist or reject the particular candidate
- Resume
    - Keep Current: You may retain the current resume
    - Delete Current: delete the current resume
    - Replace Current: replace current resume with another resume for which you will be prompted to upload another resume document.
- Keywords: used to search for candidates with specific qualifications needed for a particular vacancy Comment
- Date of Application: date of which the application was created.

The default application status is "Application Initiated" and the HR Admin can perform the following action for the particular candidate:

- Shortlist
- Reject

Shortlist

The Admin or the Hiring Manager can choose to shortlist a particular candidate; Select "Shortlist" from the "Action" drop down menu and the screen as shown in Figure 9.4 will appear.

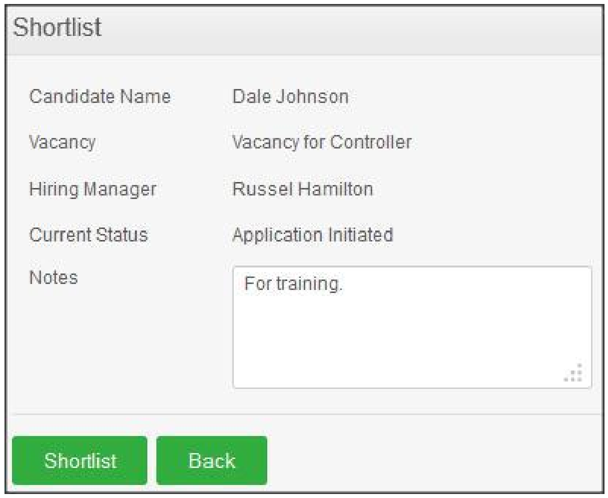
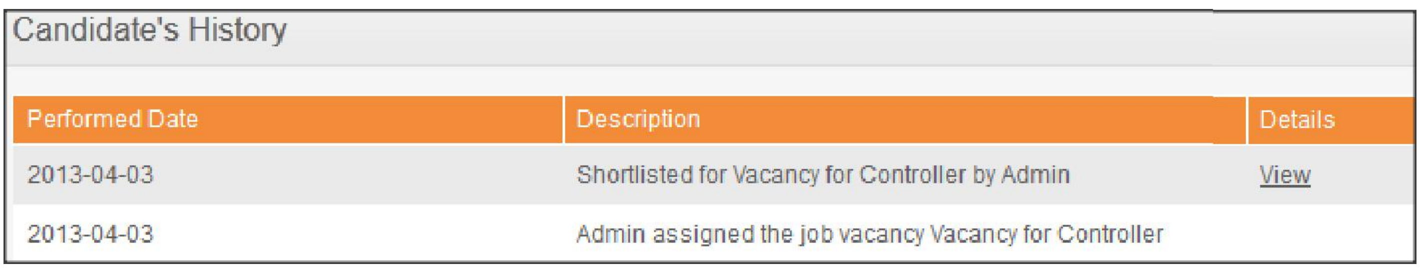


Figure 9.4: Shortlist

Click "Shortlist" to shortlist the candidate. Click "Back" to shown the candidate's application history.

The following action will be reflected under "Candidate's History" as shown in Figure 9.5.



Candidate's History

Performed Date	Description	Details
2013-04-03	Shortlisted for Vacancy for Controller by Admin	View
2013-04-03	Admin assigned the job vacancy Vacancy for Controller	

Figure 9.5: Candidate's History

Reject

Alternatively, the Admin or Hiring Manager can turn down an application. To do so, select "Reject" from the "Action "drop down menu and click "Save" and the screen as shown in Figure 9.6 will appear.

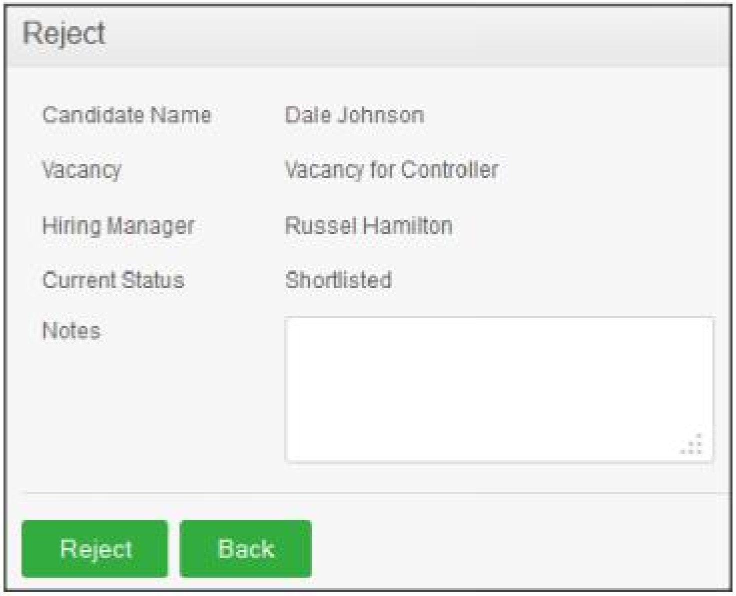


Figure 9.6: Reject

Schedule Interview

Once a candidate is shortlisted, they can now be scheduled for an interview, to schedule an interview, select "Schedule Interview" from the "Action" drop down menu and the screen as shown in Figure 9.7 will appear.

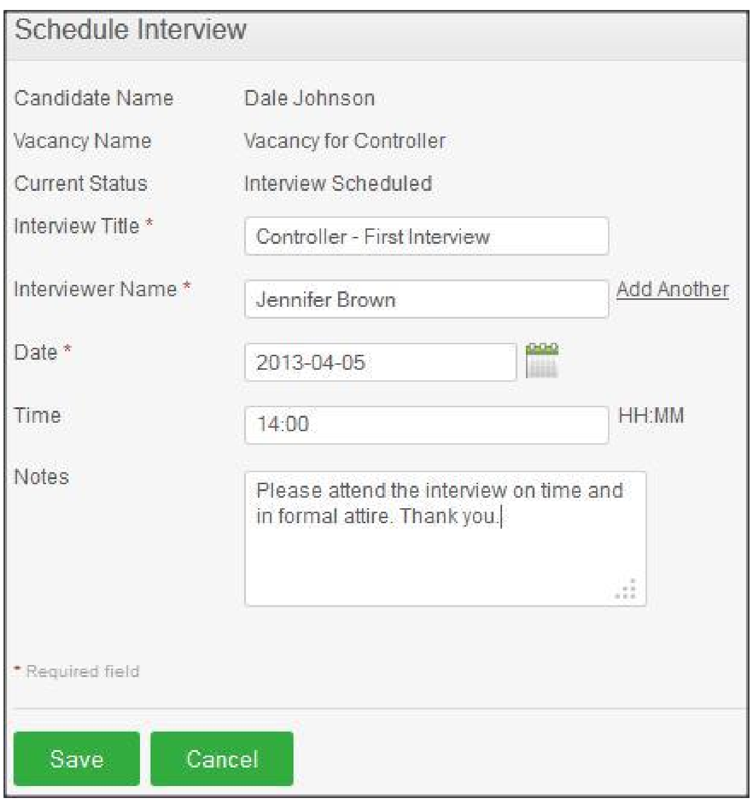


Figure 9.7: Schedule Interview

Enter the following fields and click “Save”. Click “Back” and the following action will then be reflected under “Candidate’s History” as shown in Figure 9.8.

Candidate's History

Performed Date	Description	Details
2013-04-03	Admin scheduled Controller - First Interview on 2013-04-05 at 14:00 with Jennifer Brown for Vacancy for Controller	View
2013-04-03	Shortlisted for Vacancy for Controller by Admin	View
2013-04-03	Admin assigned the job vacancy Vacancy for Controller	

Figure 9.8: Candidate’s History

Mark Interview Passed

Once a candidate has completed his interview, the HR Admin or the Hiring Manager may pass or fail the candidate based on the interview. To mark interview as passed, select “Mark Interview Passed” from the “Action “drop down menu and the screen as shown in Figure 9.9 will appear.

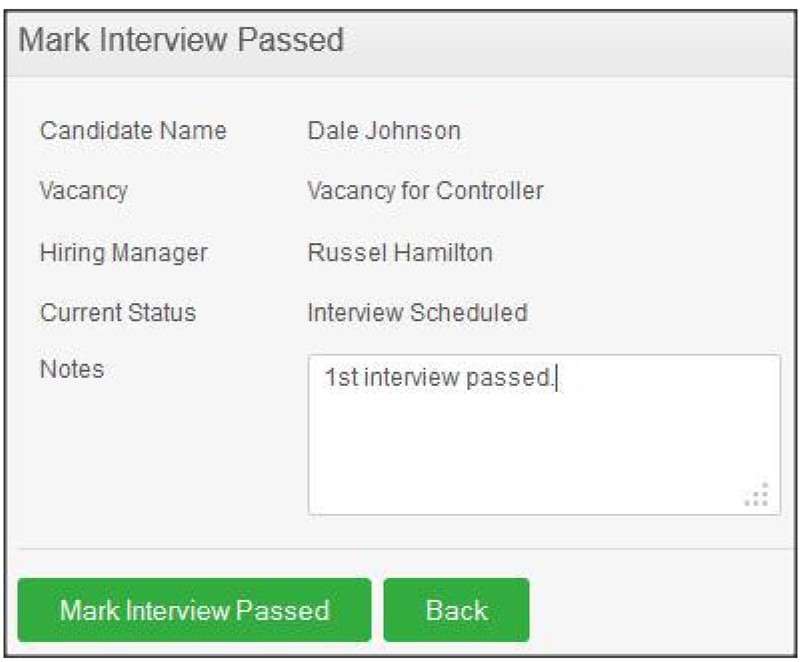


Figure 9.9: Mark Interview Passed

You may write a note and click “Mark Interview Passed” to confirm action.
Click ‘Back” and the following action will be reflected under “Candidate’s History” as shown in Figure 9.10.

Candidate's History

Performed Date	Description	Details
2013-04-03	Admin marked Controller - First Interview as passed for Vacancy for Controller	View
2013-04-03	Admin scheduled Controller - First Interview on 2013-04-05 at 14:00 with Jennifer Brown for Vacancy for Controller	View
2013-04-03	Shortlisted for Vacancy for Controller by Admin	View
2013-04-03	Admin assigned the job vacancy Vacancy for Controller	

Figure 9.10: Candidate's History

Mark Interview Failed

The HR Admin or the Hiring Manager can also mark the interview failed. To do so, select "Mark Interview Failed" from the "Action" drop down menu and the screen as shown in Figure 9.11 will appear

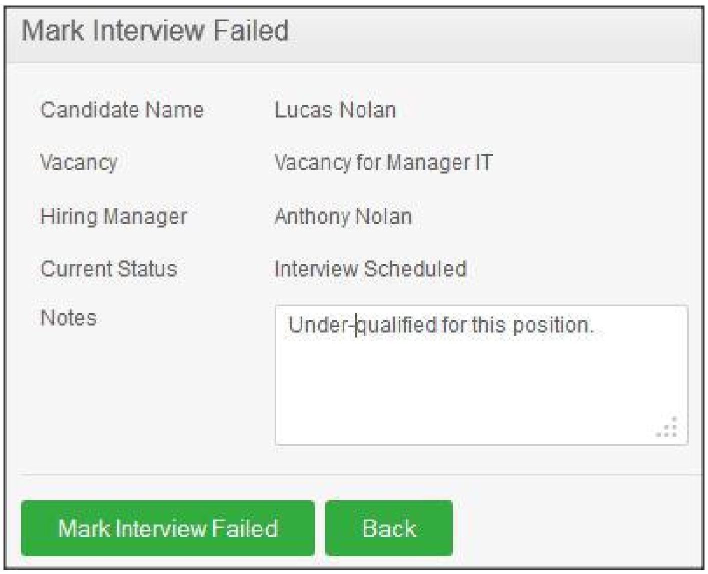


Figure 9.11: Mark Interview Failed

You may write a note and click "Mark Interview Failed" to confirm the action. Click "Back" and the action will be reflected under "Candidate's History" as shown in Figure 9.12.

Candidate's History

Performed Date	Description	Details
2013-04-03	Admin marked SE - 1st Interview as failed for Vacancy for Manager IT	View
2013-03-29	Admin scheduled SE - 1st Interview on 2013-04-04 at 10:50 with Nick Silverstone for Vacancy for Manager IT	View
2013-03-29	Shortlisted for Vacancy for Manager IT by Admin	View
2013-03-29	Admin assigned the job vacancy Vacancy for Manager IT	

Figure 9.12: Candidate's History

Offer Job

The HR Admin or the Hiring Manager may offer the candidate the job. To do so, click “Edit” and select “Offer Job” from the “Action” drop down menu and the screen as shown in Figure 9.13 will appear.

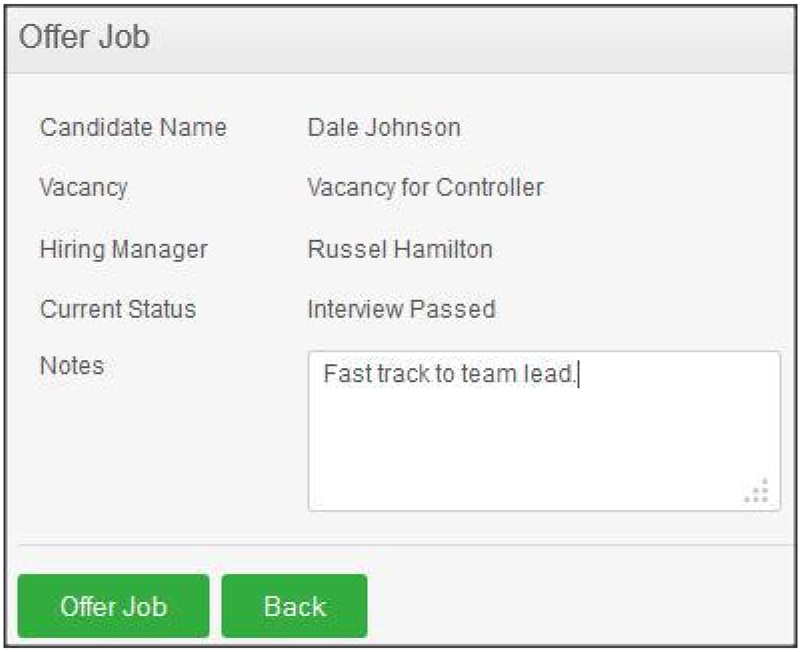


Figure 9.13: Offer Job

You may enter a note and click “Offer Job” to confirm the action. Click “Back” and the action will be reflected under Candidate’s History as shown in Figure 9.14.

Candidate's History

Performed Date	Description	Details
2013-04-03	Admin offered the job for Vacancy for Controller	View
2013-04-03	Admin marked Controller - First Interview as passed for Vacancy for Controller	View
2013-04-03	Admin scheduled Controller - First Interview on 2013-04-05 at 14:00 with Jennifer Brown for Vacancy for Controller	View
2013-04-03	Shortlisted for Vacancy for Controller by Admin	View
2013-04-03	Admin assigned the job vacancy Vacancy for Controller	

Figure 9.14: Candidate’s History

Decline Offer

If incase the offer was declined by the applicant then it can be listed as a “Decline Offer”. To mark the application as decline offer, click “Edit” and select “Decline Offer” from the “Action” drop down menu and the screen as shown in Figure 9.15 will appear.

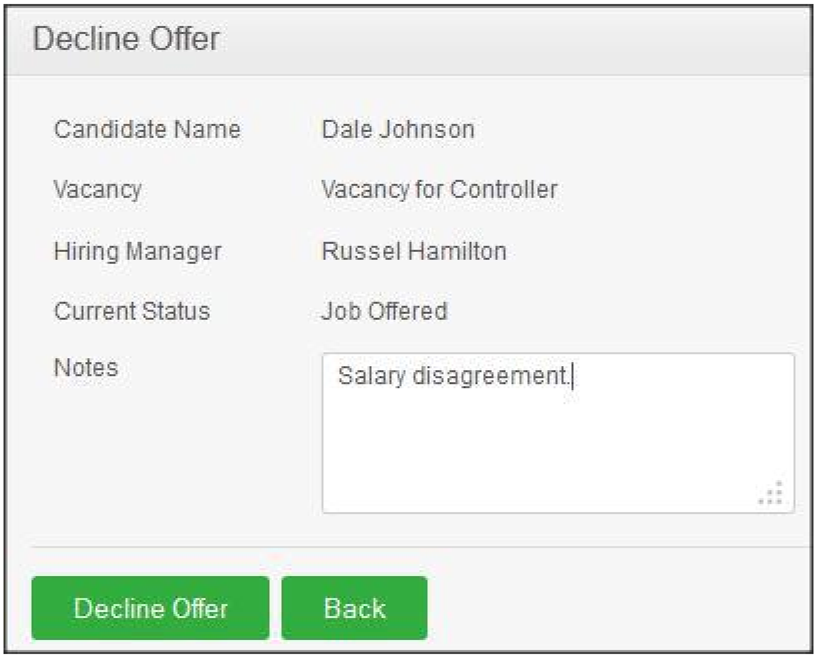


Figure 9.15: Decline Offer

You may enter a note and click “Decline Offer” to confirm the action. Click “Back” and the following action will be reflected under the Candidate’s History as shown in Figure 9.16.

Candidate's History

Performed Date	Description	Details
2013-04-03	Admin marked the offer as declined for Vacancy for Controller	View
2013-04-03	Admin offered the job for Vacancy for Controller	View
2013-04-03	Admin marked Controller - First Interview as passed for Vacancy for Controller	View
2013-04-03	Admin scheduled Controller - First Interview on 2013-04-05 at 14:00 with Jennifer Brown for Vacancy for Controller	View
2013-04-03	Shortlisted for Vacancy for Controller by Admin	View
2013-04-03	Admin assigned the job vacancy Vacancy for Controller	

Figure 9.16: Candidate’s History

Hire

The HR Admin or the Hiring Manager may choose to hire the candidate at this point. To hire the candidate, click “Edit” and select “Hire” from the “Action” drop down menu and the screen as shown in Figure 9.17 will appear.

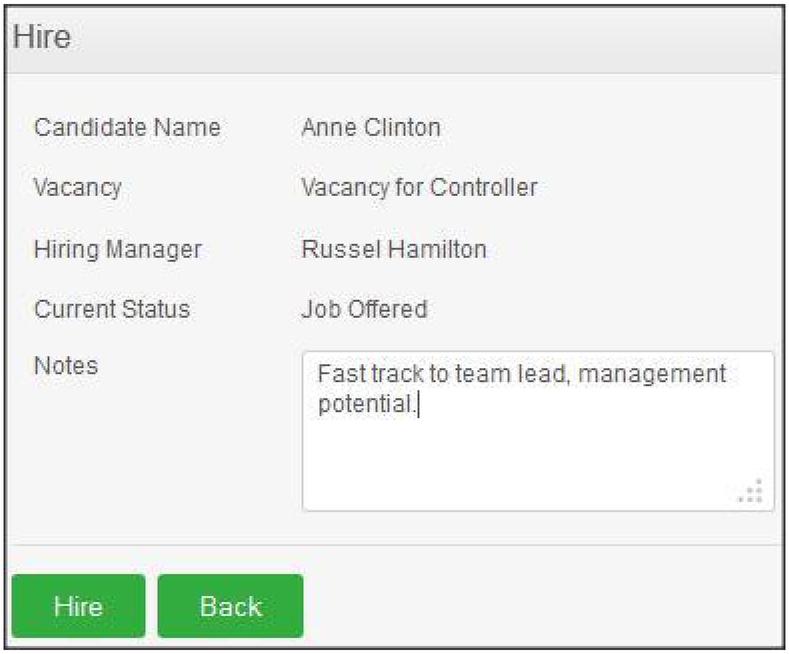
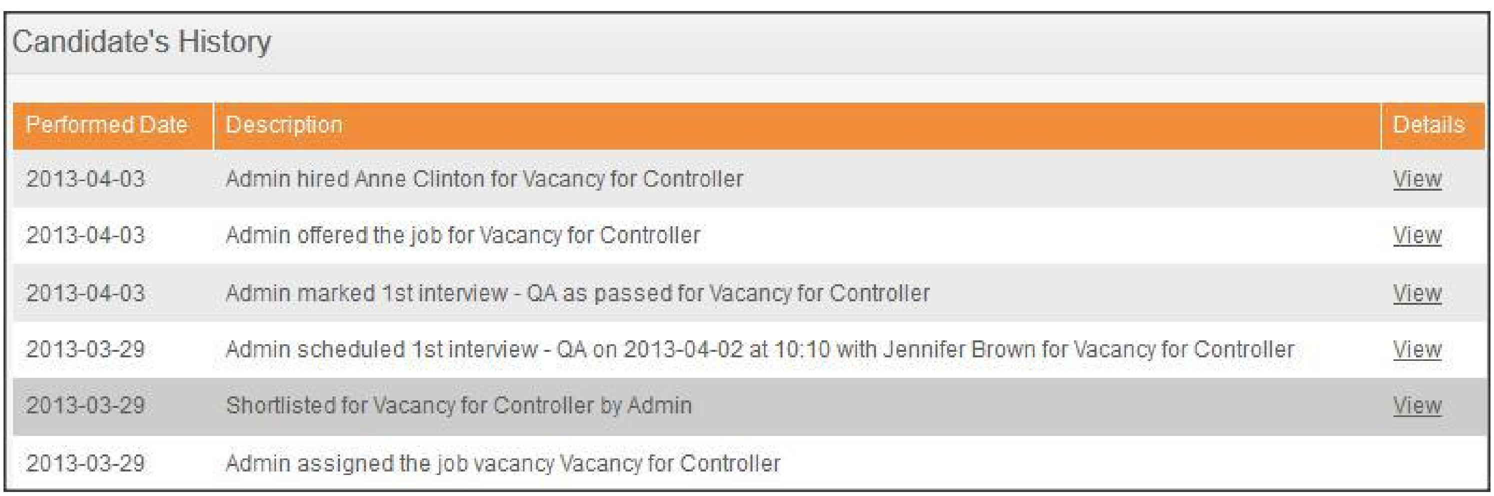


Figure 9.17: Hire

You may add a note and click “Hire” to confirm the action. Click “Back” and the action will be reflected under “Candidate’s History as shown in Figure 9.18.



Candidate's History

Performed Date	Description	Details
2013-04-03	Admin hired Anne Clinton for Vacancy for Controller	View
2013-04-03	Admin offered the job for Vacancy for Controller	View
2013-04-03	Admin marked 1st interview - QA as passed for Vacancy for Controller	View
2013-03-29	Admin scheduled 1st interview - QA on 2013-04-02 at 10:10 with Jennifer Brown for Vacancy for Controller	View
2013-03-29	Shortlisted for Vacancy for Controller by Admin	View
2013-03-29	Admin assigned the job vacancy Vacancy for Controller	

Figure 9.18: Candidate’s History

Once the candidate is hired, he/she will be added to the employee database under the PIM Module.

9.2 Vacancies

Here the Admin can create a vacancy for a particular job title required by the company. To add a vacancy, go to Recruitment>>Vacancies and click “Add” and the screen as shown in Figure 9.19 will appear.

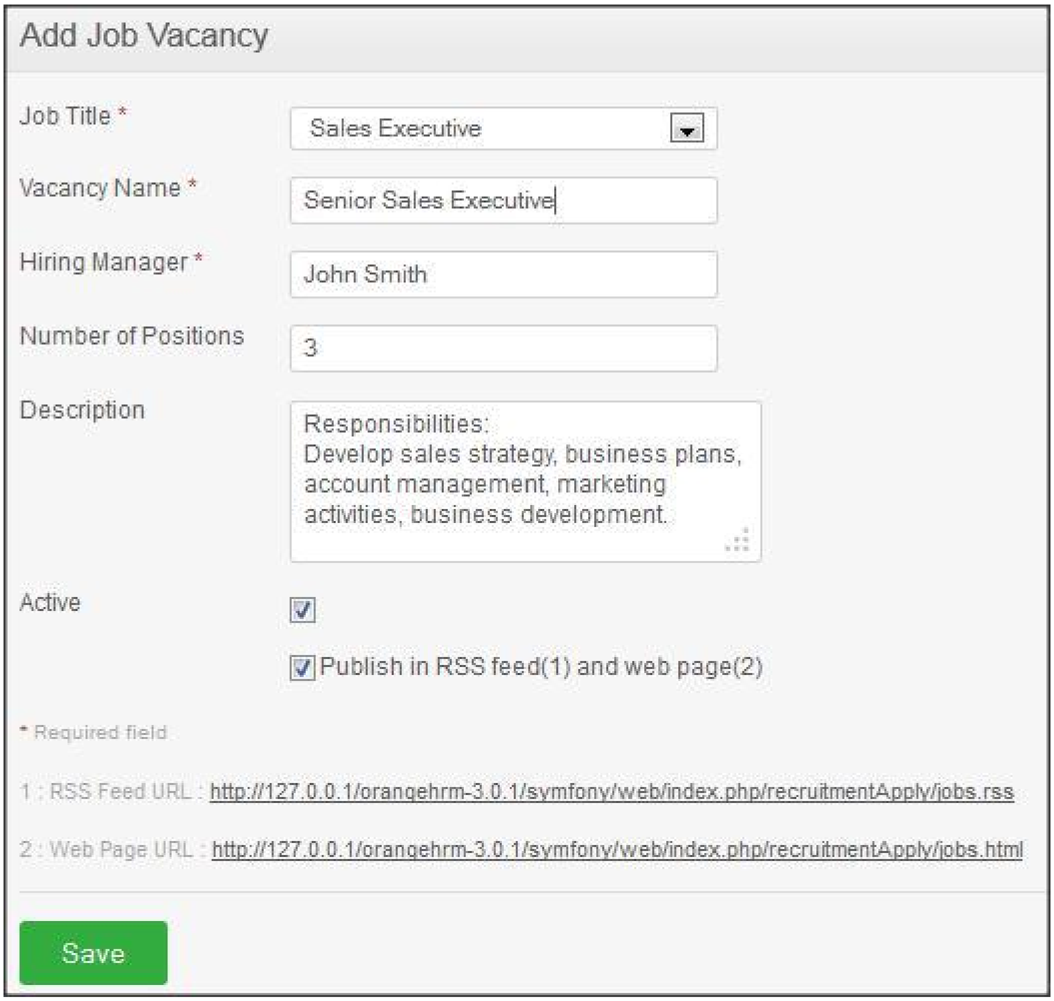


Figure 9.19: Add Job Vacancy

Enter the following fields:

- Job title: the position that is needed by the company
- Vacancy Name: the name in which you want the vacancy to be posted as.
- Hiring Manager
- Number of Positions
- Description: a description of the job role
- Active: to make the job vacancy active and be posted online. You may unselect “Active” if you want to post the vacancy some other time.

➢ Publish in RSS Feed and Webpage: you may publish the vacancy of RSS feed and on the company's webpage. The following links will appear to show the pathway of the job that was posted as shown in Figure 9.20.

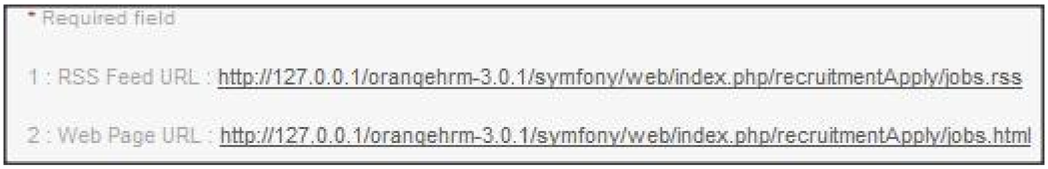


Figure 9.20: RSS Feed

Click "Save "once you have defined the job vacancy and it will be listed as shown in Figure 9.21.

	Vacancy	Job Title	Hiring Manager	Status
	Post of Accountant	Accountant	Jennifer Brown	Active
	Vacancy for Controller	Controller	Russel Hamilton	Active
	Vacancy for Manager IT	IT Manager	Anthony Nolan	Active

Figure 9.21: Job Vacancy List

Applying for a Vacancy

Both internal and external applicants can apply for a vacancy through jobs.php. When an applicant visits the company's website or through the RSS feed they will be directed to the job vacancy portal in jobs.php where they will see all the active vacancies of the company as shown in Figure 9.22.

Figure 9.22: Active Job Vacancies

The applicant may click “Apply” under the particular Job title and they will be directed to the screen as shown in Figure 9.23.

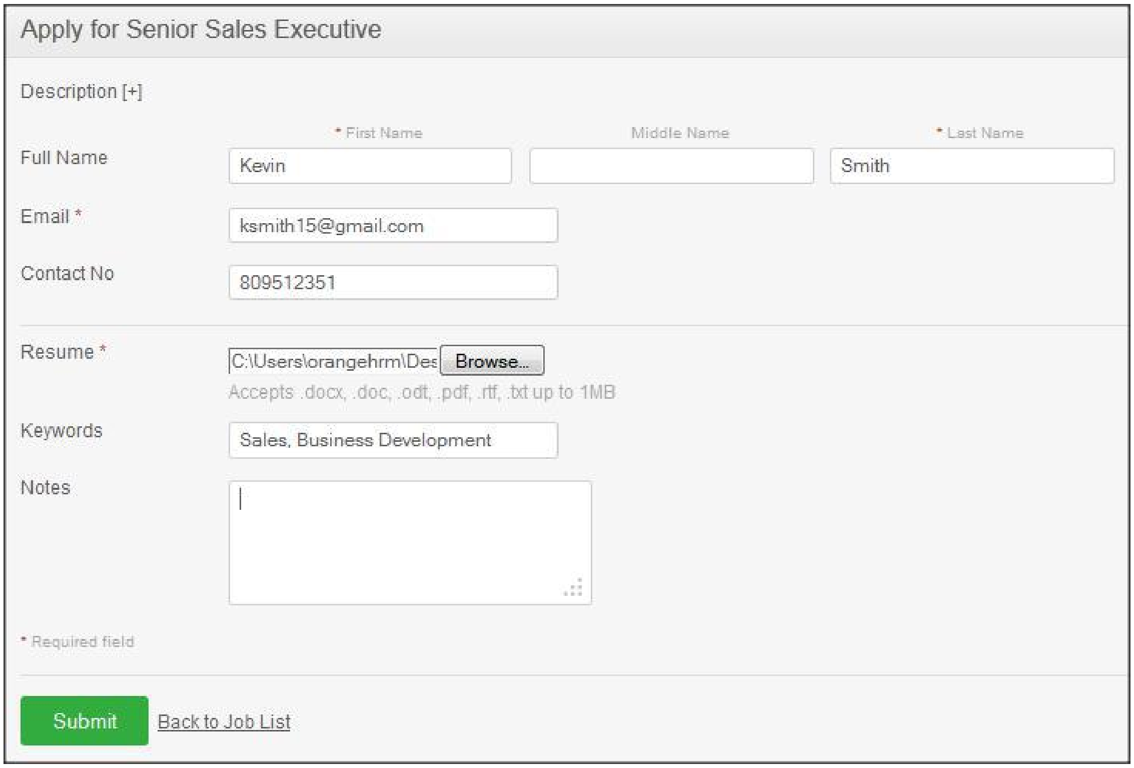


Figure 9.23: Apply for Job Vacancy

The applicant needs to enter the following fields and click “Submit” to submit the application and the candidate will appear under the candidate database (Recruitment Module>>Candidates) as shown in Figure 9.25.

Figure 9.25: Candidate List

10.0 Performance Module

This module manages and reviews the performance of all employees where a company can understand how well an employee is performing in relation to their strategic goals and objectives.

10.1 KPI List

This feature enlists all Key Performance Indicator (KPI) for all job titles. To view KPI List, go to **Performance>Configure>KPI** and the screen as shown in Figure 10.1 will appear.

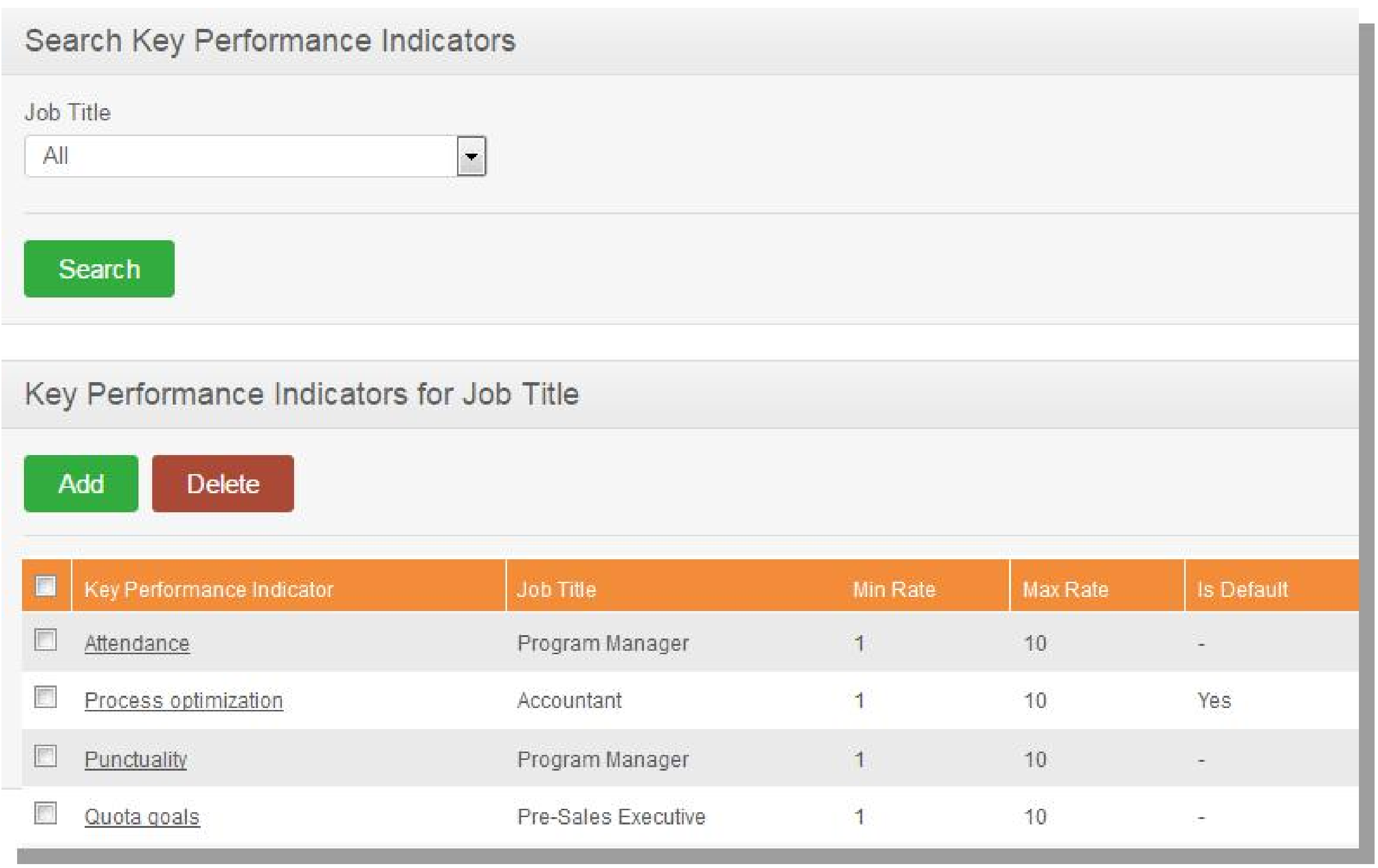


Figure 10.1: Key Performance Indicators

10.2 Add KPI

The HR Admin can define a KPI for a specific job title. To do so, go to Performance>Configure>KPI, and click on "Add" and the screen as shown in Figure 10.2 will appear.

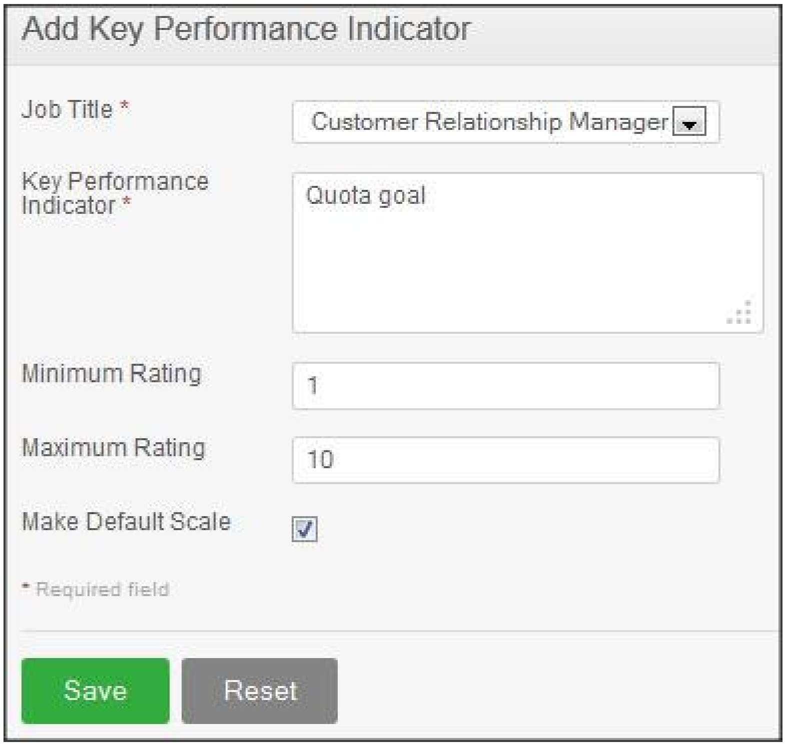


Figure 10.2: Add Kep Performance Indicator

Enter the "Job Title" you wish to define a KPI for, define the "KPI", and define the "Minimum" and "Maximum" rating for the KPI. If you select "Make Default Scale" the defined minimum and maximum rating will be pre-populated for all KPIs added in the future.

Click "Save" once all the fields are entered. The following Key Performance Indicator will then be listed under KPI List (see Figure 10.2).

10.3 Delete KPI

Add Delete Copy

	Key Performance Indicator	Job Title	Min Rate	Max Rate	Is Default
☐	Attendance	Program Manager	1	10	-
☐	Process optimization	Accountant	1	10	Yes
☐	Process optimization	Cheif Executive Office	1	10	-
☐	Punctuality	Program Manager	1	10	-
☐	Quota goals	Pre-Sales Executive	1	10	-

Figure 10.3: Key Performance Indicators for Job Title

You may enter multiple entries of KPIs for different Job titles as shown in Figure 10.3. 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".

10.4 Manage Trackers

The Performance Tracker is a feature which allows the performance of employees to be logged and tracked throughout the year. Such tracking would be helpful during formal performance reviews for both employees and reviewers.

A Performance tracker is created by assigning reviewer(s) to an employee. Only administrators can add/modify a Tracker.

A Reviewer can be any employee regardless of him/her being a supervisor/subordinate or any other role.

To add a Performance Tracker, go to **Performance>Configure>Trackers**, and click on "Add". The following screen as shown in Figure 10.4 will be shown.

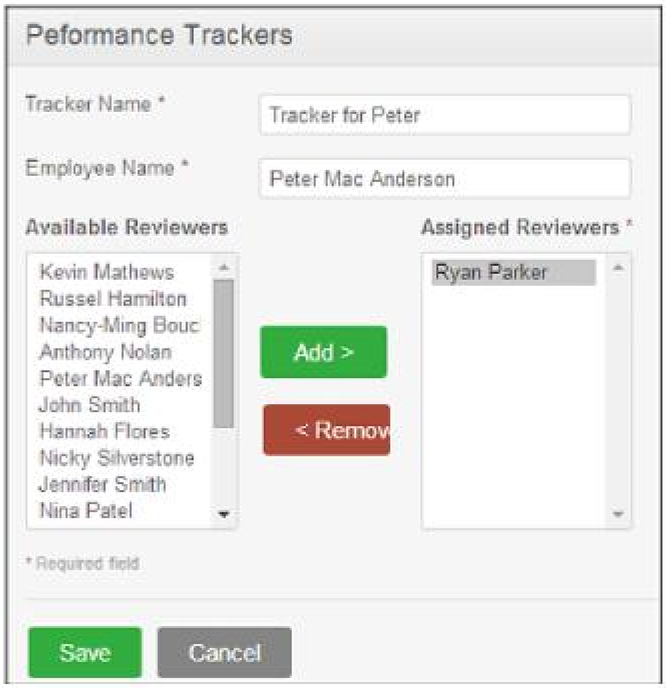


Figure 10.4: Add Performance Tracker

The Admin can then enter a Tracker Name, select Employee who will be tracked, and then pick the relevant reviewers who will be able to track that employees performance.

Click on Save to save the performance tracker. The following screen as shown in Figure 10.5 will appear

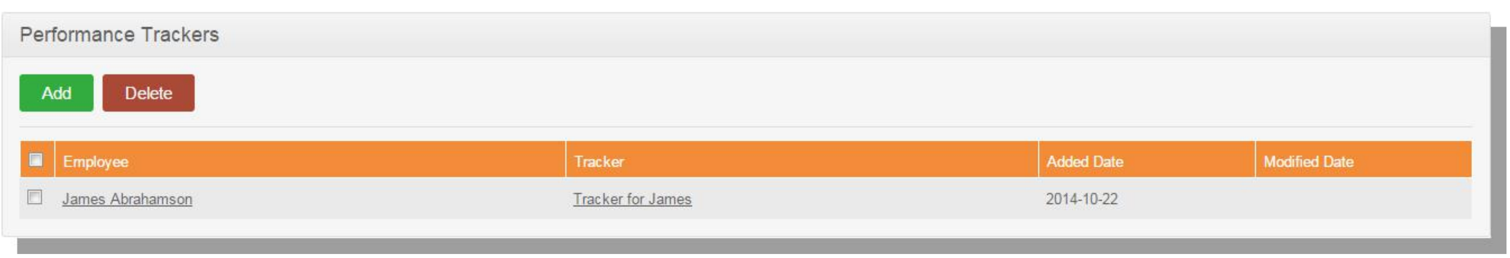


Figure 10.5: Manage Performance Trackers

Multiple Trackers can be created.
To delete a tracker, select the appropriate tracker entry, and click on Delete.

10.4 Performance Trackers

This feature allows you to track an employee's performance by adding a tracker log, positive/negative feedback and a comment. To track an employee's performance, go to Performance>>Employee Trackers and click on add button and the screen as shown in Figure 10.6 will appear.

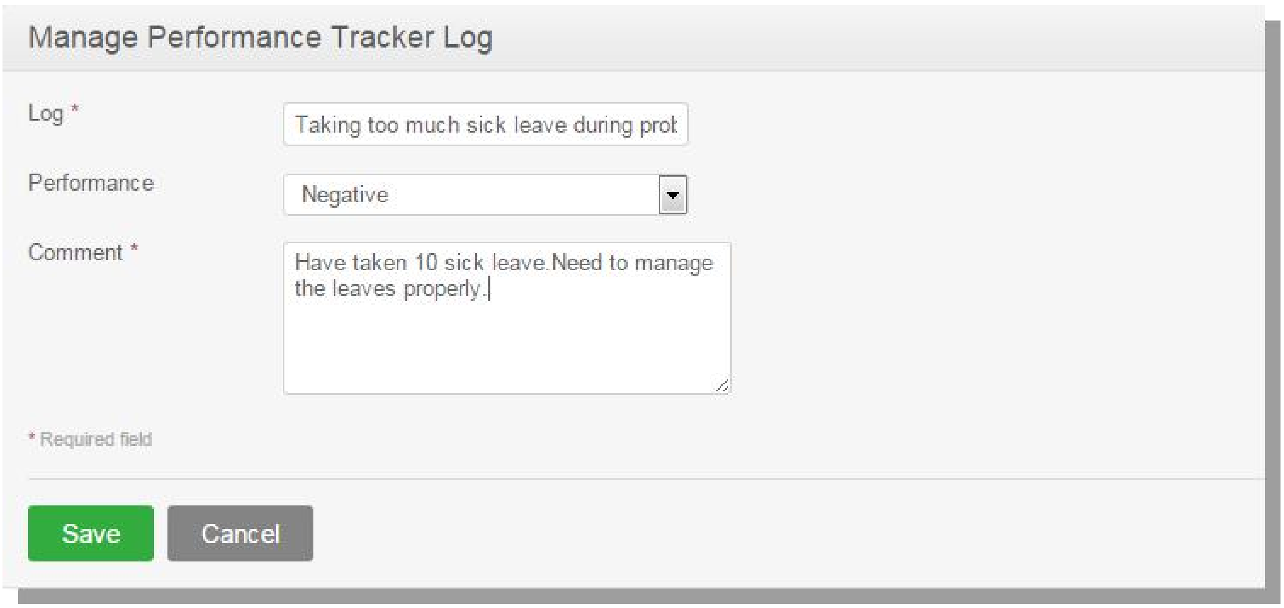


Figure 10.6: Manage Performance Tracker Log

Enter the following details and click "Save and the list of performance trackers will be listed as shown in Figure 10.7.

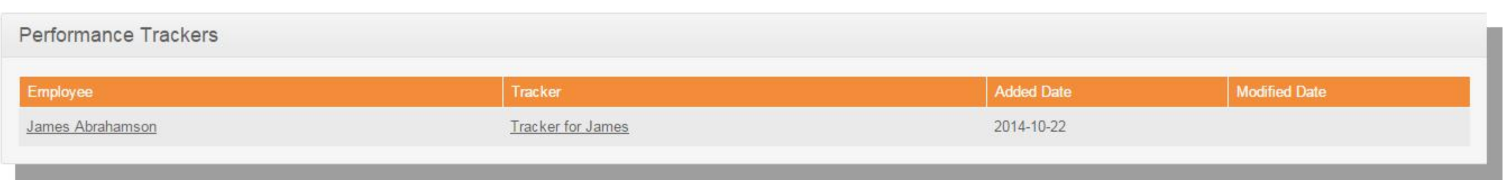


Figure 10.7: Performance Tracker List

10.5 Add Review

This feature allows a performance review agenda for a particular employee. To enter performance review details for a particular employee, go to Performance>>Manage Reviews>>Manage Reviews, and and click on Add.the screen as shown in Figure 10.8 will appear.

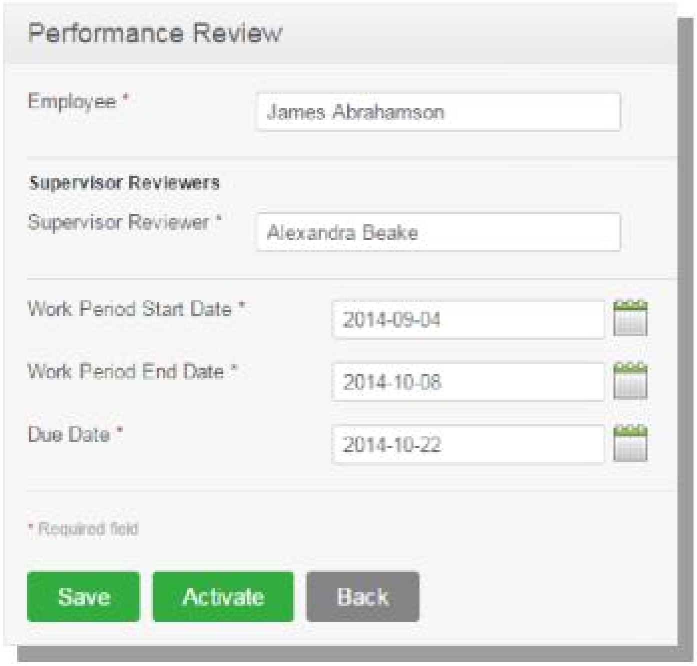


Figure 10.8: Add Performance Review

Enter the following details and click "Save". Click on "Activate" to view the performance review details and the list of employees with the following performance review details will be listed as shown in Figure 10.9.

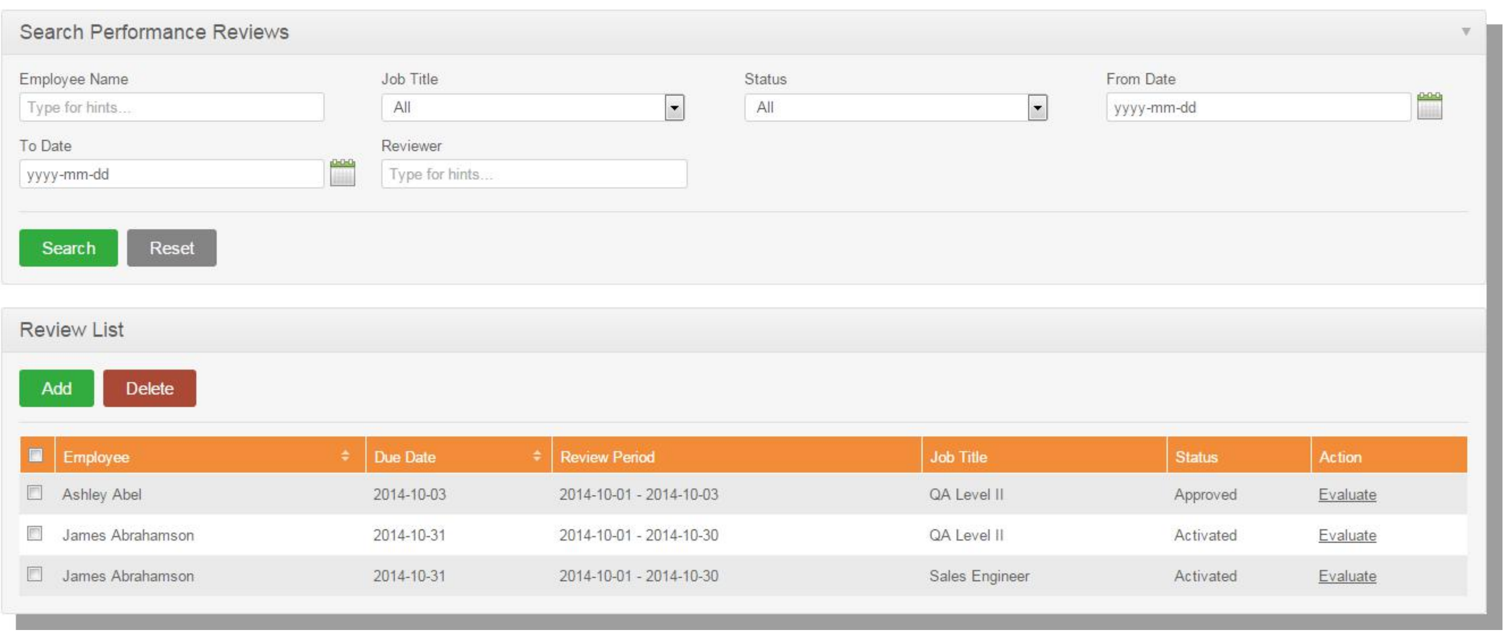


Figure 10.9: Performance Review List

You may enter multiple entries of performance review for employees. 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".

10.6 Search Reviews

This feature allows you to search reviews based on his/her job role, review status etc. To search an employee's performance review, go to Performance>>Manage Reviews>>Review List and the screen as shown in Figure 10.10 will appear.

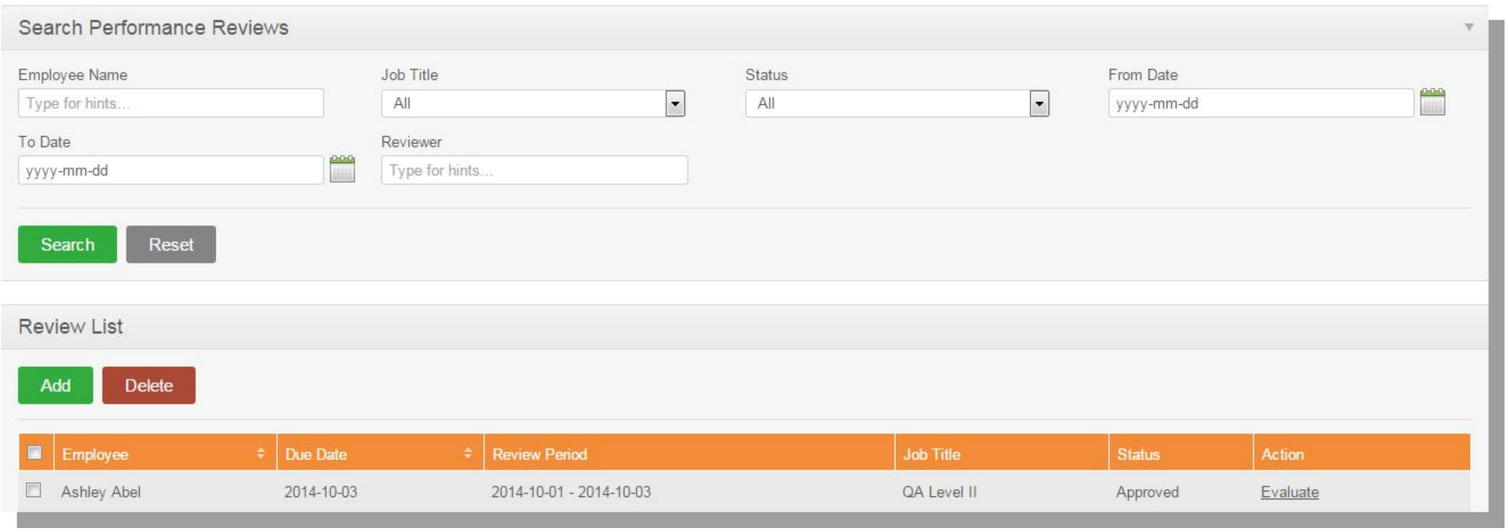


Figure 10.10: Search Performance Reviews

You may search for a particular performance review of an employee by using the search criteria:

- From – To: The date period for the particular performance review
- Job Title: employees with the specified job title to be reviewed
- Status: the status of the Performance reviews
- Employee: the employee's name
- Reviewer: the reviewer's name

Simply click on the Evaluate link to initiate the performance review and the screen as shown in Figure 10.11 will appear.

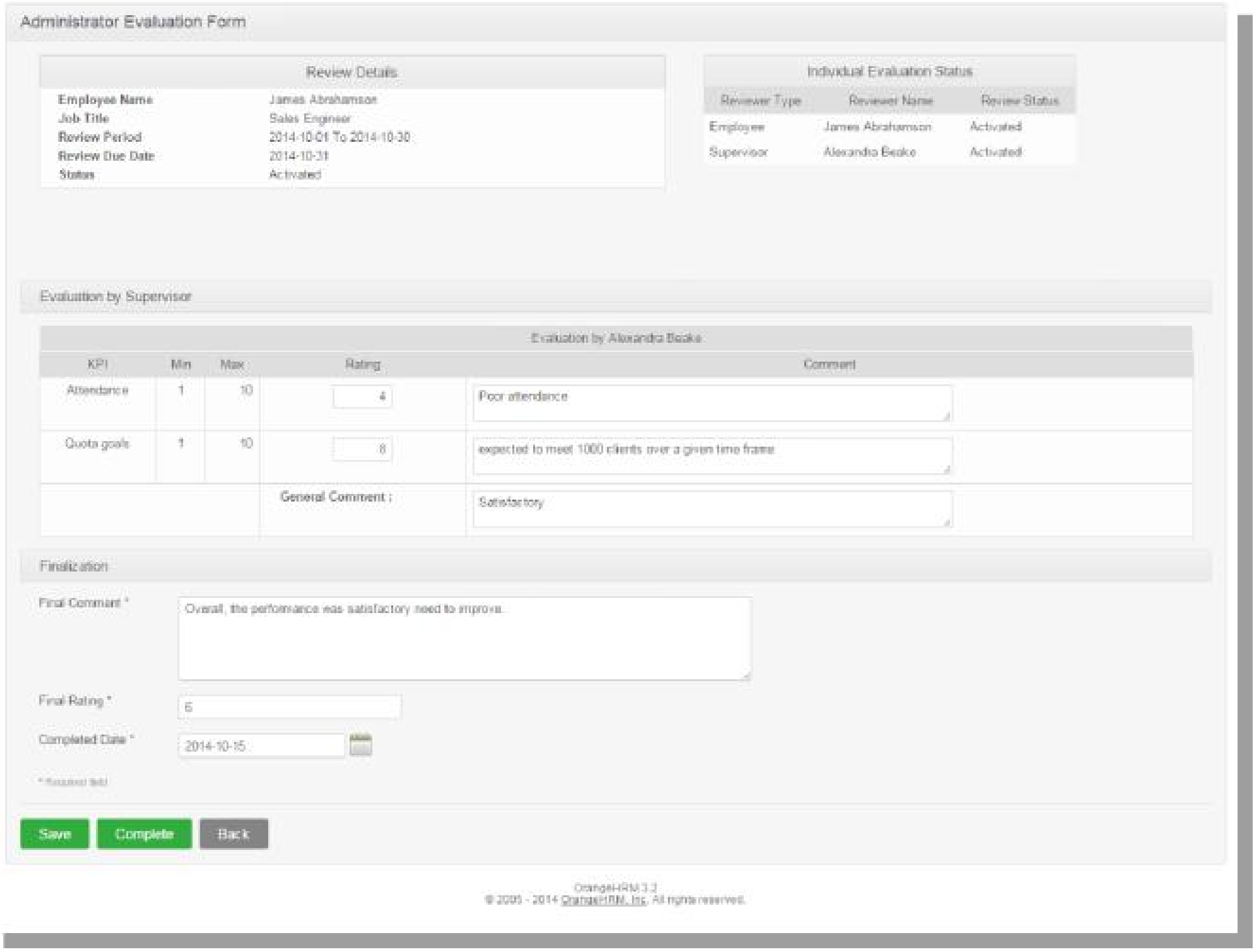


Figure 10.11: Performance Review of an employee

Click "Edit" to enter details:

- Rating: rate the employee based on the KPI with the assigned Min and Max Rate
- Comments: Reviewer may enter a comment based on the KPI
- Note: you may enter an overall note regarding the employee's performance review under the section finalization.

11.0 Maintenance

This module will allow admin users to Purge employee records, Purge candidate records and Access records Only Admin user will be able to access the maintenance module.

Purge Employee Records

This feature will allow admin users to purge required employee records, go to **Maintenance>Purge Records>Employee Records** and the screen as shown in Figure 11.1 will appear.

Figure 11.1: Verify Password

Admin user will need to enter the password for verification.

If the incorrect password is entered a validation message will be displayed as below.

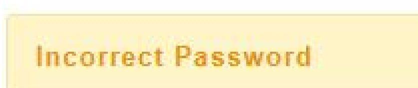


Figure 11.2: Validation

Once the user enters the correct password, you will be directed to a screen where you can search for a past employee for purging. Only terminated employees can be purged.

User can enter the required employee name to be purged on the auto complete text area.

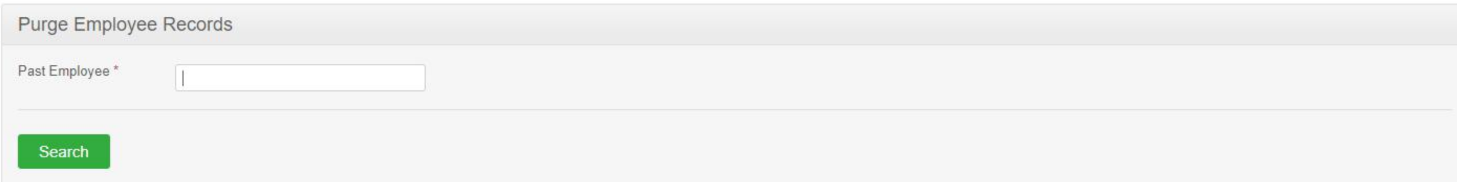


Figure 11.3: Search Employee

As shown below the pre fix "Past Employee" will be shown. (since its a terminated employee)

Figure 11.4: Enter employee name

When the user selects the terminated employee to be purged it will list the summary as below. Including the "Photograph", "First Name", Middle Name", "Last Name" and "Employee Id".

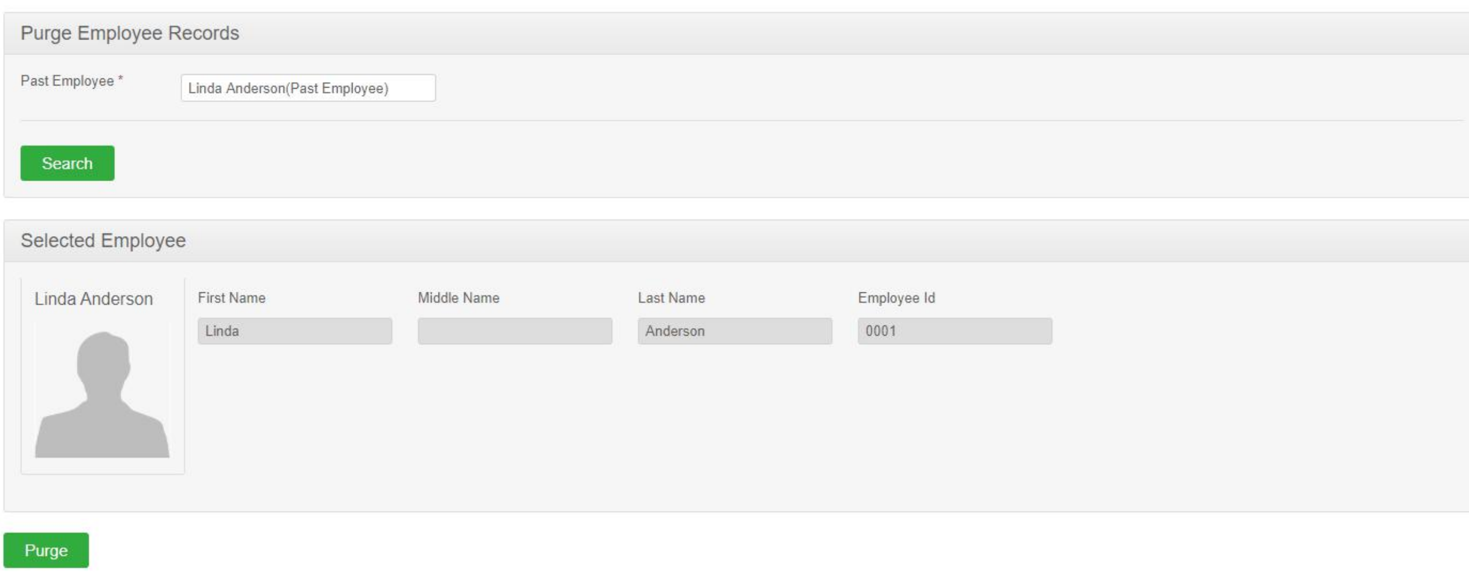


Figure 11.5: List employee

Once the user click on the “PURGE” button there will be a warning message displayed.

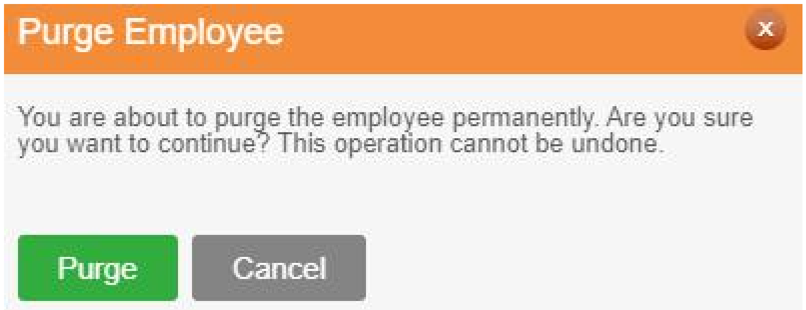


Figure 11.6: Warning

If the user selects “Purge “ the employee records will be purged and there will be a confirmation message shown as below.

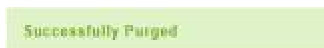


Figure 11.7: Validation

If the user selects “Cancel” the system will go back to the previous screen.

A purged records cannot be undone. Further the user login account will be deleted and the employee may no longer have access to the system.

Purge Candidate Records

When adding a new record through the “Recruitment” module there will be a checkbox with the question to get the consent from the candidate to keep the data for future processing.

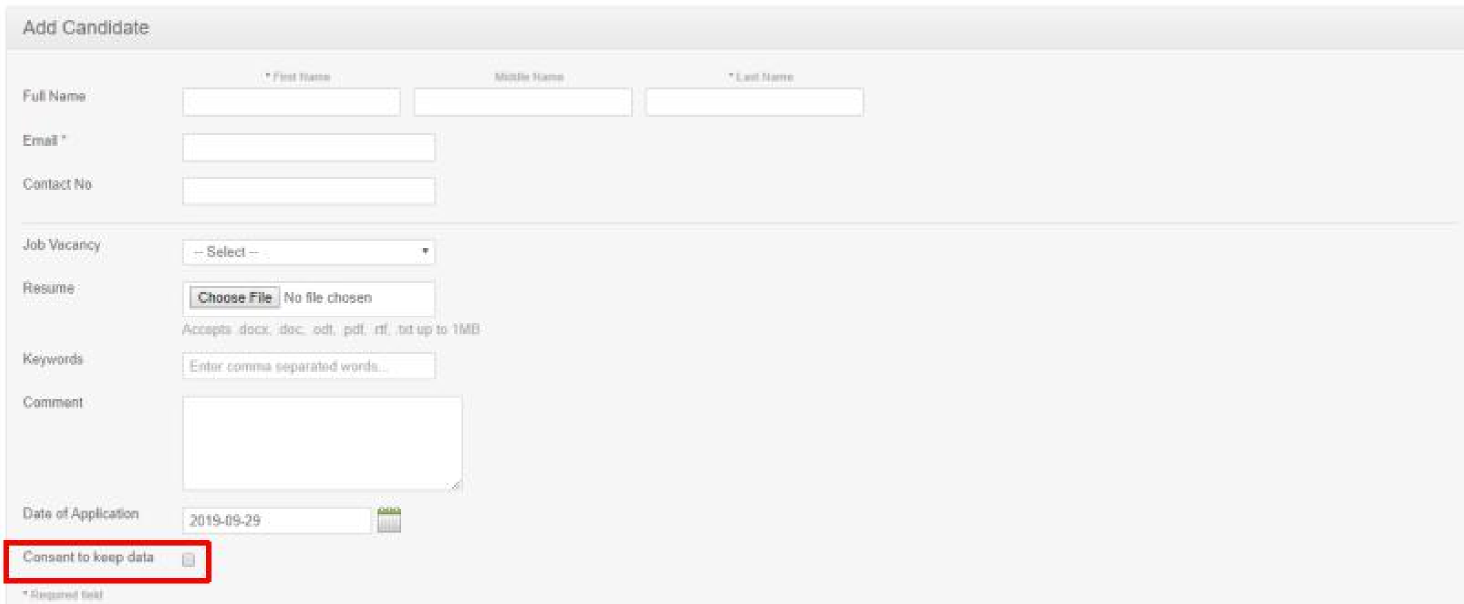


Figure 11.8: Recruitment Add Candidate

When applying for a vacancy, candidates can provide consent to keep their data in the system for future purposes.

Go to **Maintenance>Purge Records>Candidate Records** and the screen as shown in Figure 11.9 will appear.

Figure 11.9: Verify password

Purging candidate records is only possible for candidates applied for existing vacancies in the system without providing the consent to keep the data for future processing.

User will enter the vacancy name on the auto complete text area

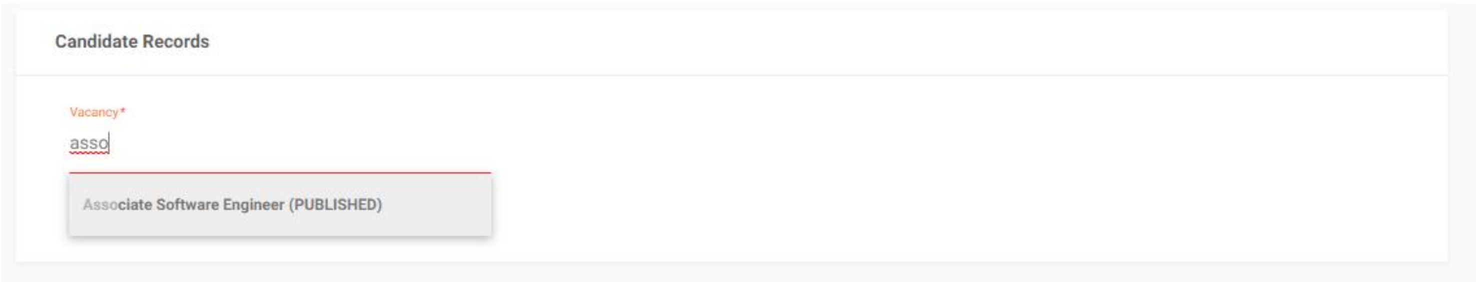


Figure 11.10: Enter Vacancy

When the user selects the vacancy, it will list down the candidates who have not provided consent for the vacancy.

Candidate details will list out the “Name”, “Status” and “Applied Date”.

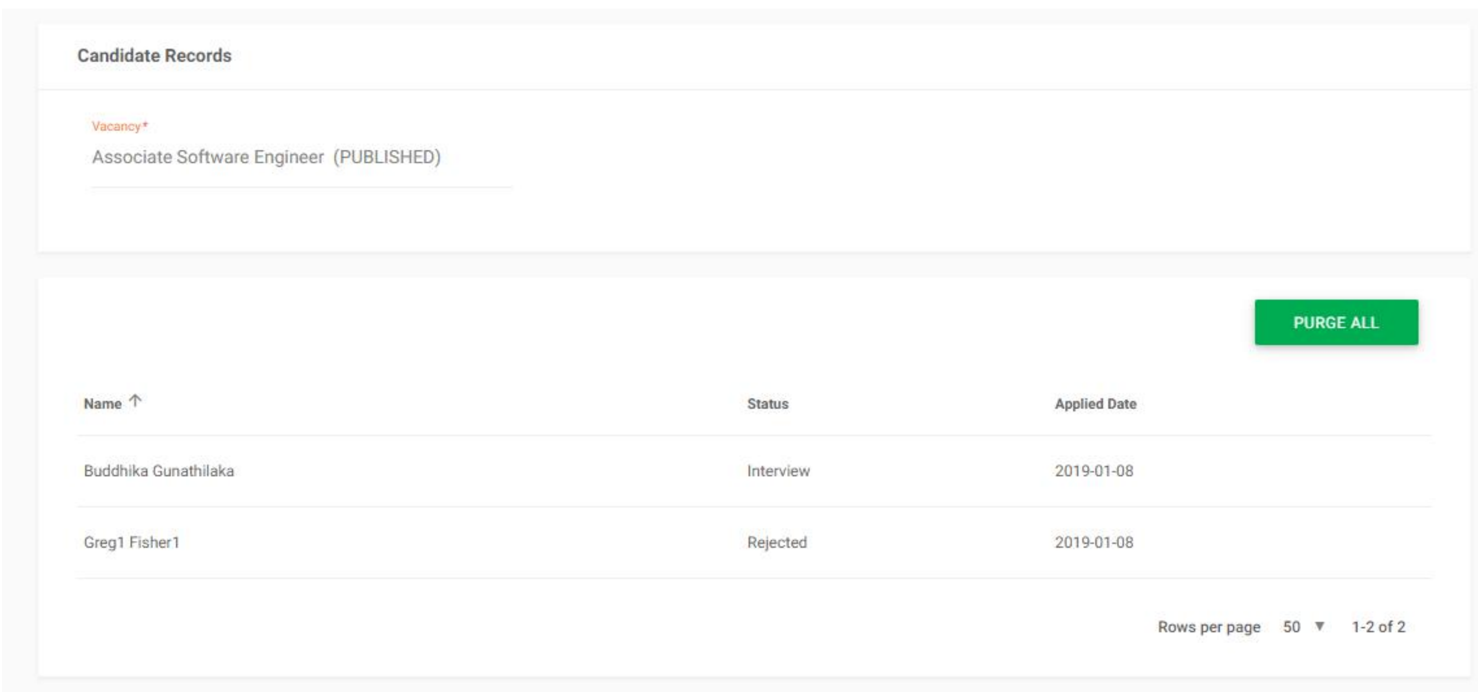


Figure 11.10: List view

User cannot choose a selected few from the vacancy for purging, Purging cannot be undone

With the “PURGE All” button purging will be done for all candidates who have not provided the consent for the vacancy.

Once the user click on the “PURGE ALL” button there will be a warning message prompted, and the user Confirm by clicking on the “YES, PURGE” button.

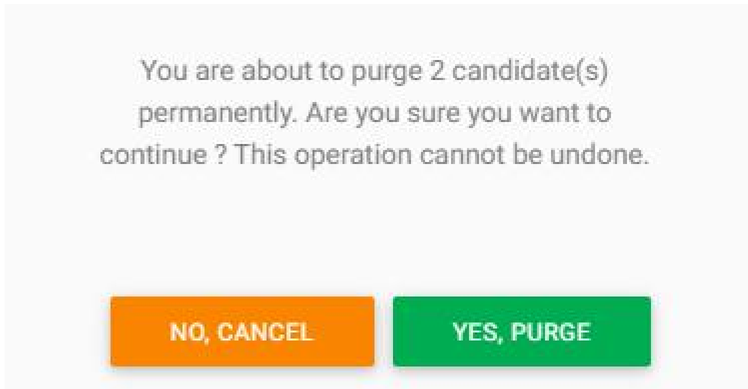


Figure 11.11: Warning

There will be a confirmation toast as shown below.

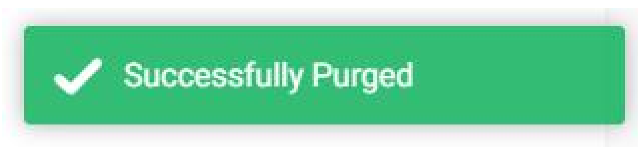


Figure 11.12: Confirmation

Clicking on the “NO, CANCEL” button will take you to the previous page.

Access Records

Go to **Maintenance>Purge Records>Access Records** and the screen shown below will appear.

User needs to enter the correct password.

Figure 11.13: Verify password

Once the correct user password is entered system will allow the user to enter access records screen.

Figure 11.14: Enter Employee name

Once the user enter the required employee name and click "Search" button. The details will be listed as below.

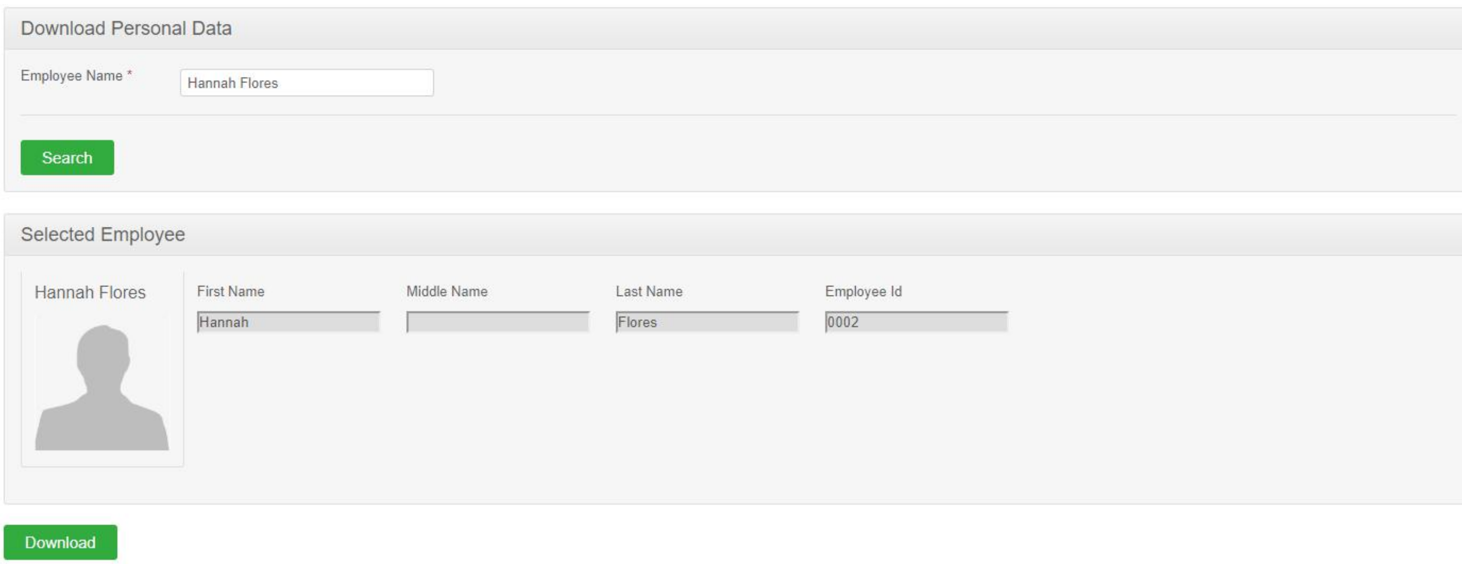


Figure 11.15: List view

User can click on the "Download" button to download the candidate records. When download is selected user needs to specify the location where he needs the output file to be saved.

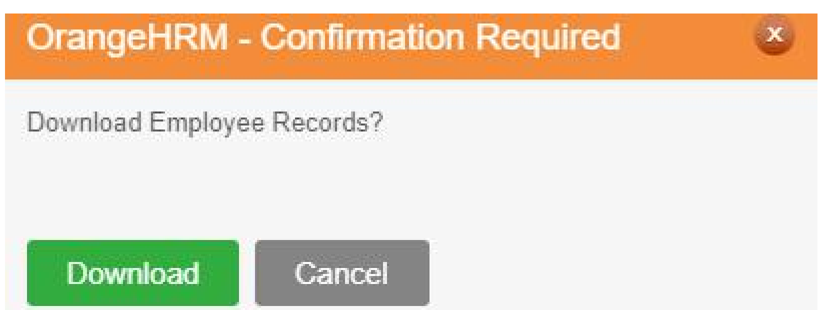


Figure 11.16: Warning

Download data will allow the user to export personal data as a JSON output.

Figure 11.17: JSON file

12.0 Dashboard

The Dashboard is a page which provides:

- ○ A summary of vital information (Eg: Number of employees in a department)
- ○ Quick access to certain tasks (Eg: Leave applications pending for approval)

- Ideally, it tries to make important information available in one glance/ in one click
- Dashboard forms the Home page of every user, and can be accessed by clicking on "**Dashboard**".

Figure 12.1 shows the Dashboard module.

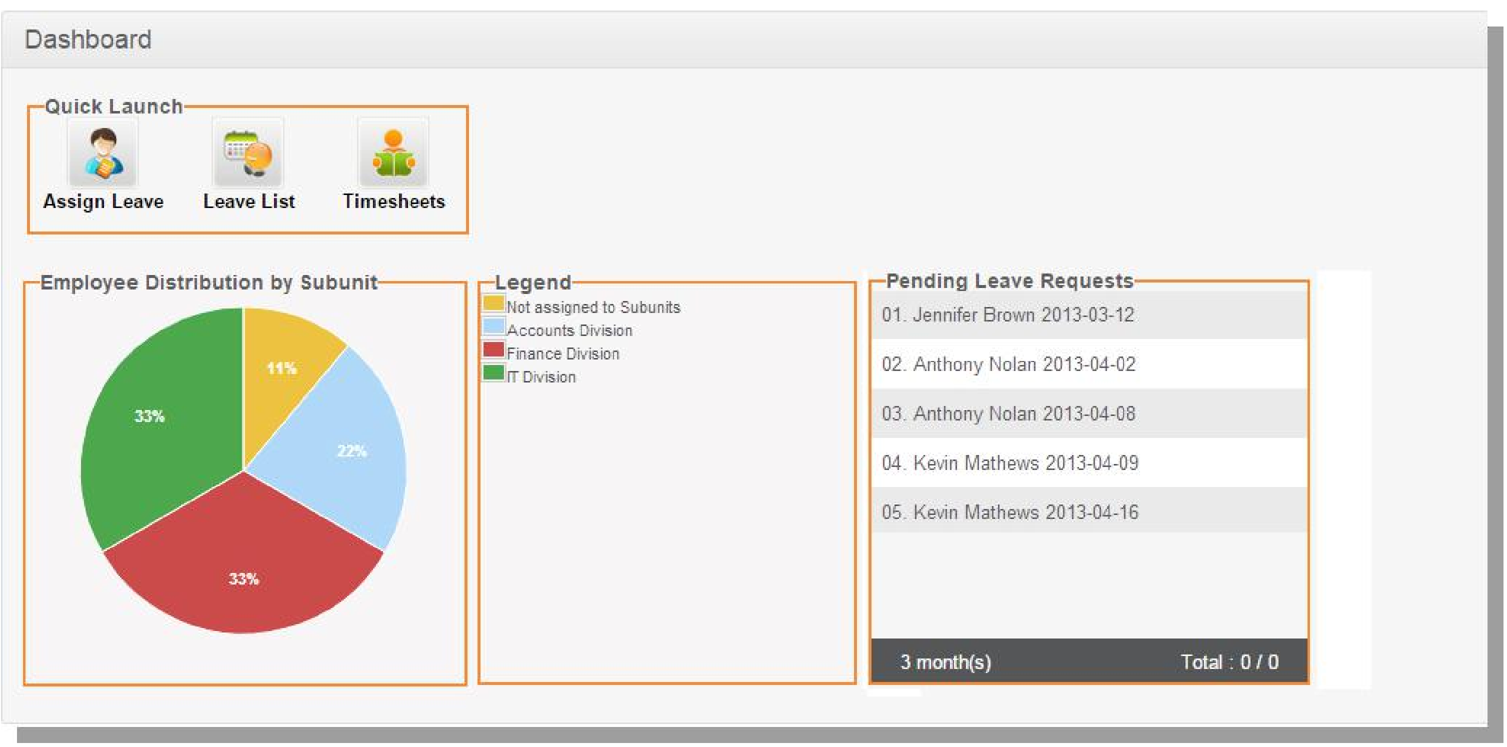


Figure 12.1: Dashboard

12.1 Quick Launch Panel

This panel contains some shortcuts for invoking certain menu items, as shown in Figure 12.2.

Figure 12.2: Quick Launch Panel

Following are the shortcuts shown for ESS users:

- Apply Leave
- My Leave
- My Timesheets

Following are the shortcuts shown for Admins:

- Assign Leave
- Timesheets
- Leave List

12.2 Task List Panel

This panel lists tasks a supervisor/admin needs to perform and is not visible for ESS users who are not supervisors
as shown in Figure 12.3.

Figure 12.3: Task List Panel

Pending Leave Requests Panel

- Pending Leave Requests of subordinates are shown with their name and starting date of the leave application (Administrators see a list of employees according to their region and privilege)
- Clicking on an item takes the user to the detailed view of the leave list
- Items are ordered according to the leave start date, and then by the employee's last name.
- interviewers will see only interviews scheduled for them

12.3 Admin Users View Charts

There is one chart displayed to the Admin users with its legend.

Chart: Number of active employees in the top level sub-units (Pie Chart)

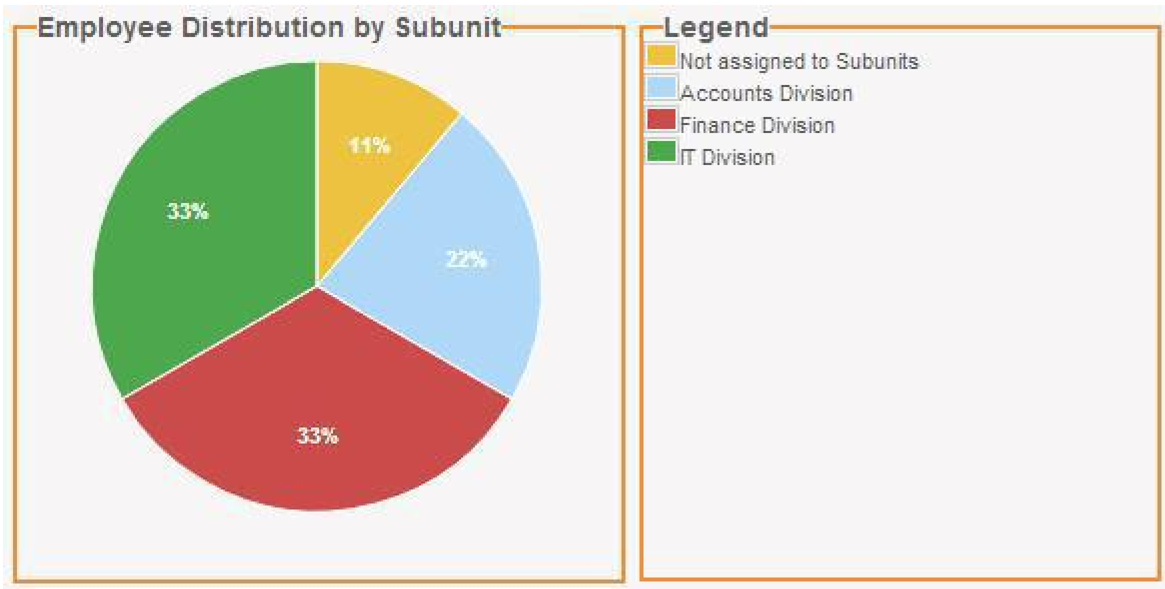


Figure 12.4: Charts

13.0 Corporate Directory

Corporate directory is the place where users can view public information about the rest of the employees in the company, and can be accessed by clicking on "**Directory**" in the menu.

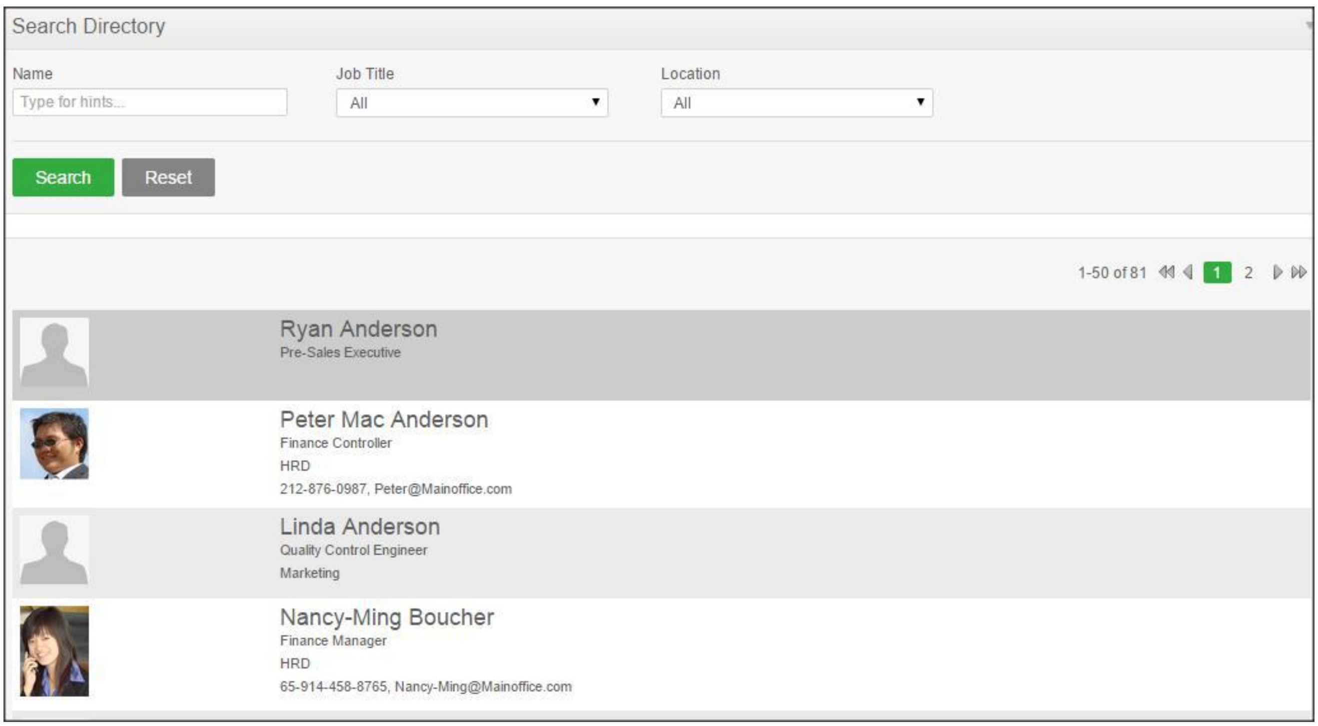


Figure 13.1: Corporate Directory

Users can:

- Access the corporate directory – can be accessed by clicking on "**Directory**" in the main menu.
- Search listings –
  - The following search criteria are available
    - Name - Auto suggestion
    - Job Title - Auto suggestion
    - Location - Drop Down
- View search results –
  - All employees are listed in a paginated view sorted by their last name.
  - The following information are considered public and displayed in directory listing: #Image #Full name #Job Title #Subunit #Location #Contact Number (work phone) #Email (work email)

14.0 Forgot Password Feature

- Any user (Admin, Supervisor, ESS) will be able to reset their password using the “Forgot your password” feature.

Figure 14.1: Search

- System will direct the user to the below screen upon clicking the “Forgot your password” link.

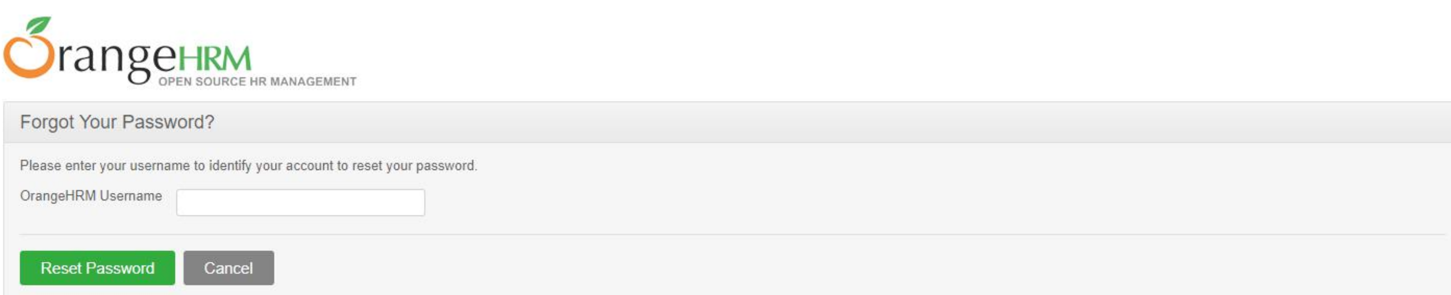


Figure 14.2; Enter Username

- System will prompt the validation messages as per the scenarios mentioned below;

Scenario	Validation Message
Entered user is not available in the system. Username doesn't match with existing users in the system.	Please contact HR admin in order to reset the password
Work email is not entered in the system for the user who is requesting to reset the password	Work email is not set. Please contact HR admin in order to reset the password
Email configuration is not setup in the system.	Password reset email could not be sent
Password reset request is already made and user is requesting again without resetting the password.	There is a password reset request already in the system
Terminated or purge username is entered to request reset password.	Please contact HR admin in order to reset the password
User clicks on the reset password button without giving a user name	Could not find a user with given details
Default admin tries to reset the password - No employee assigned	Work email is not set. Please contact HR admin in order to reset the password

- System will send an email upon clicking on the "Reset Password" button. The email will be sent to the work email associated with the user account. Email Format

- System will redirect the user to instructions screen if the entered user exists in the system with work email.

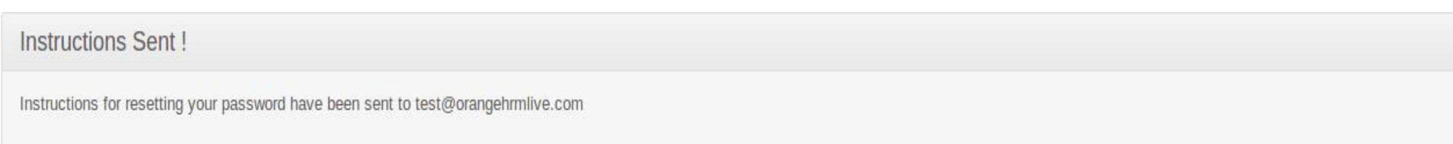


Figure 14.3: Instructions

- System will redirect the user to "Enter A New password screen" upon accessing the link in the received email.

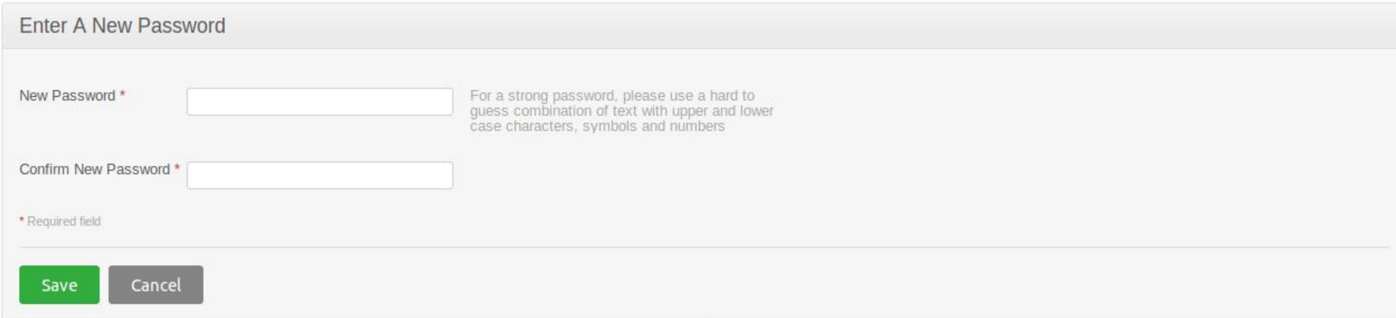


Figure 14.4: Enter New Password

- The link will expire if its used for resetting the password. Further the reset request should expire after 24 hours. System will show the message "The link is expired, Please request again" upon expiring the code.
- System will validate the new password strength based on the system configuration. System will show the entered password strength. The password strength is categorized as;

  Very weak

  Weak

  Better

  Medium

  Strong

  Strongest

- The password strength should not be lower than the defined strength in the system. The default strength is defined in the system as "Medium".
- System will show a confirmation message upon successfully resetting the password.

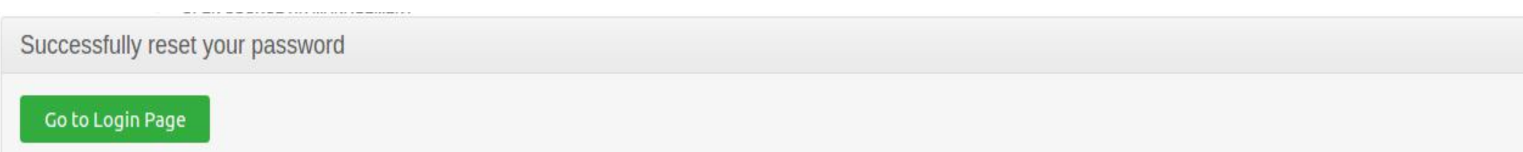


Figure 14.5: Confirmation

15.0 Troubleshooting

During the Installation Process:

1. Are you receiving the following error message while installing OrangeHRM?

Access denied for user 'root'@'localhost' (using password: NO). Please Check if Privileged Database Username and Password Correct.

This is due to an invalid MySQL username or password.
Once you provide a valid MySQL username and password, the installation process can be continued.

2. Give a unique Database Name...

Database (end) already exists.

The set up will not allow you to have duplicate database names. If you have previously installed the OrangeHRM application with the same database name, you need to provide a different Database Name for the OrangeHRM system that is being installed. Therefore, make sure that the Database Name given for each OrangeHRM system installed is unique.

3. Linux Users

If you are a Linux user, provide file permission.
Ex: *sudo chmod -R 777 projectname*

Please visit https://help.ubuntu.com/community/FilePermissions for more information on how to provide file permission.


In order for your OrangeHRM installation to function properly, please ensure that all of the system check items listed below are green. If any are red, please take the necessary steps to fix them.

Component	Status [For More Information ?]
PHP version	OK (ver 5.3.2-1ubuntu4.15)
MySQL Client	OK (ver 5.1.62)
MySQL Server	OK (ver 5.1.62-0ubuntu0.10.04.1)
MySQL InnoDB Support	Enabled
Write Permissions for "lib/confs"	Not Writeable*
Write Permissions for "lib/logs"	Not Writeable*
Write Permissions for "symfony/apps/orangehrm/config"	Not Writeable*
Write Permissions for "symfony/cache"	Not Writeable*
Write Permissions for "symfony/log"	Not Writeable*
Maximum Session Idle Time before Timeout	OK
Register Globals turned-off	OK

After Installation:

4. A Blank Page Displayed

This might be due to several reasons:

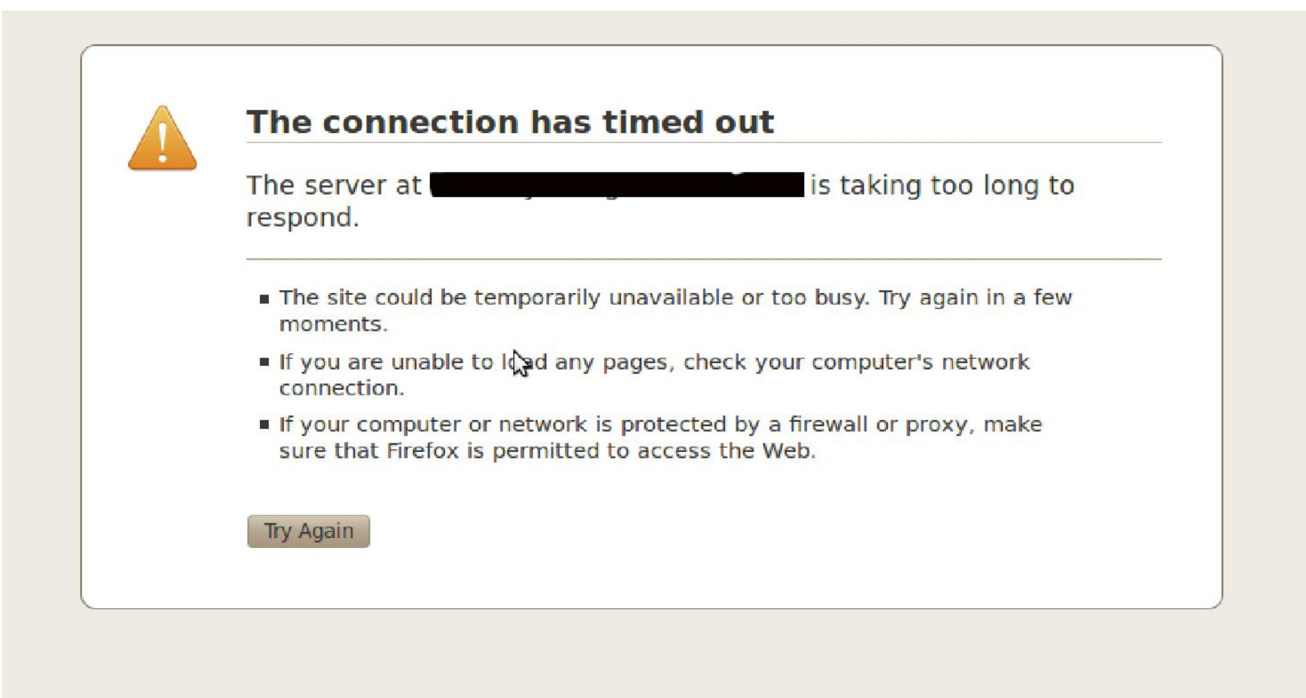
- You might be using an older version of Internet Explorer.
- JavaScript might be disabled in your browser.
- You might be using IIS or a different web server. We recommend Apache server, or you could install xampp/wamp package instead.
- You might have to increase the PHP and MySQL parameters. Please visit the following link to change parameter values:

https://wiki.orangehrm.com/index.php/38%29_How_to_increase_PHP_and_MYSQL_performance_parameters%3F

(Take backups of php.ini and my.ini(or my.cnf) files before making any changes.

While Using OrangeHRM:

5. Web Page Time Out



Increase the PHP and MySQL parameters.

Please visit the following link to learn how to change PHP and MySQL parameters:
https://wiki.orangehrm.com/index.php/38%29_How_to_increase_PHP_and_MYSQL_performance_parameters%3F

16.0 Frequently Asked Questions

1. **How to enable InnoDB support in MySQL?**

To enable "InnoDB" open "my.cnf" file in a text editor and search for "skip-innodb".
Add the leading "#" and restart the MySQL database server to enable InnoDB.

2. **I have created the MySQL database user properly with all rights and setup Conf.php correctly, when I login I get an error saying; "Client does not support authentication protocol requested by server; consider upgrading MySQL client".**

You are probably using PHP4 with a MySQL client older than 4.1 which does not support the password hash algorithm used by post-MySQL 4.1 databases.

The work around for the problem would be to use the following commands on MySQL prompt:

SET PASSWORD FOR '<username>'@'%' = OLD_PASSWORD('<password>');

OR

SET PASSWORD FOR '<username>'@'localhost' = OLD_PASSWORD('<password>');

3. **After I have logged into OrangeHRM I sent to a Re-login page which makes me login again.**

This could be a result of sessions being disabled or session lifetime set too short, thereby the session is expired in between requests sent to the web-server. Increase the session lifetime. (You may have to contact a system administrator if you are only given limited access)

4. **I have entered the username and password, but nothing happens.**

JavaScript is either disabled or unsupported in your browser. You need to use a JavaScript enabled browser to use OrangeHRM.
Please visit http://enable-javascript.com/ to enable JavaScript in your browser.

5. **Why can't I access OrangeHRM after I install one click installer?**

- Please check if you have installed other web server software like IIS, Sun Web Server etc.
- If you have other servers, check the ports used by each server. (They need to run in different ports).Please make sure you are accessing OrangeHRM through the correct port.
  Ex: *If the port apache server uses for http is 8080, your address should be http://localhost:8080/OrangeHrm(version).*

- If not you might have given a hostname when installing the exe.
  Ex: Say the name given was "testserver". Then you should try the url http://testserver/orangehrm.

- One other option would be to check whether the service is indeed running.

- Run services.msc in windows' run dialog box and check in the list whether the service apache is running.

- Check whether software like Skype is running, as it will occasionally prevent startup of web server.

6. How to increase PHP and MYSQL performance parameters?

Please refer :
https://wiki.orangehrm.com/index.php/38%29_How_to_increase_PHP_and_MYSQL_performance_parameters%3F

7. Unable to click on buttons in the OrangeHRM application

The error is encountered when JavaScript and other active scripting components are disabled in your Browser.
Please visit http://enable-javascript.com/ to enable JavaScript in your browser.

For more information please visit: https://wiki.orangehrm.com/index.php/Orange_FAQ

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

Appendices

Appendix 01 - Email Format

Hi <FirstName> <LastName>,

You or someone referring to your email account requested for a password reset.

Please click on the following link to reset your password.
The link

This password reset request will expire in 24hours.
If you didn't request this change please ignore this mail.

Regards,
OrangeHRM System