User Guide

Orange HRM

Document Version 1.0

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About this document

The purpose of this hSenid document is to provide information regarding the features of the on-line Orange HRM system

The intended audience for this document - the users of Orange HRM system

The document is divided into the following chapters:

Chapter	Description
Orange-HRM overview	This chapter gives a brief description of Orange HRM and its main functionalities.
Login Information	This chapter provides the login details of the system.
Admin Module	This chapter will give step by step instructions on how to use the features of the Admin Module in the Orange HRM system.
PIM Module	This chapter will give step by step instructions on how to use the features of the PIM Module in the Orange HRM system.
Maintenance Module	This chapter will give step by step instructions on how to use the Maintenance module.
Bug Tracker	This chapter explains the functionality of the Bug Tracker Module

Conventions used in this document

We use the following text formatting conventions:

italic

Used for document titles, emphasis, and for email addresses, web URLs and file and directory names.

Bold

Used for emphasis and for the command options you select.

`Letter gothic`

Used for literal code, such as configuration files, Java class names, method names and API calls.

`Letter gothic italic`

Used for arguments and parameters that will be replaced with an actual value.

Chapter 1

1 Overview

The Orange HRM is comprehensive solution for the efficient management and development of your Human Resource. It facilitates a vast range of HR activities, with features that reflect the main HR management activities. It is a web-enabled application and considering the available flexibility, OrangeHRM is a perfect platform for reengineering your HR processes and achieving a new level of HR Management. The system consists of the following modules.

- Admin Module

  The admin module is basically used to input the various data/elements related to the organization structure and the information that is to be assigned to the employees such as their designations, job specifications, etc.

- PIM Module

  The PIM module is used to maintain information of employees. Data entered through the Admin Module is used here to maintain employee information. Employee information comprises of information such as employee Information, qualifications & work experience, job Specification & remuneration details etc.

- Maintenance Module

  This module will be used to handle the maintenance tasks of Orange HRM system. Tasks such as user management, granting access rights, version history etc can be carried out using the Maintenance module.

- BUG Tracker

  In the event of any bugs being encountered while using the system, these bugs could be immediately reported on-line using the Bug Tracker module which would be useful for fixing them.

Chapter 2

2 Login Information

- **Accessing the Orange HRM System**

  The Orange HRM System could be accessed over the internet by typing the URL – www.orangehrm.com on the address bar of the browser.

NOTE: URL may vary depending on implementation

- **Login to Orange HRM System**

  Initially, the user would have to enter the user name and password as shown in figure 2.1. Click on Submit. The homepage of the Orange HRM System would be displayed on the screen if the username and password was correct.

Figure 2.1

- **Logout of System**

  Once logged in to the system, click on Logout link on the top right-hand side of the screen.

Chapter 3

3 Admin Module

Select **Admin Module** from the main menu. The Admin Module menu is shown in the figure below. Select the appropriate commands from the menu.

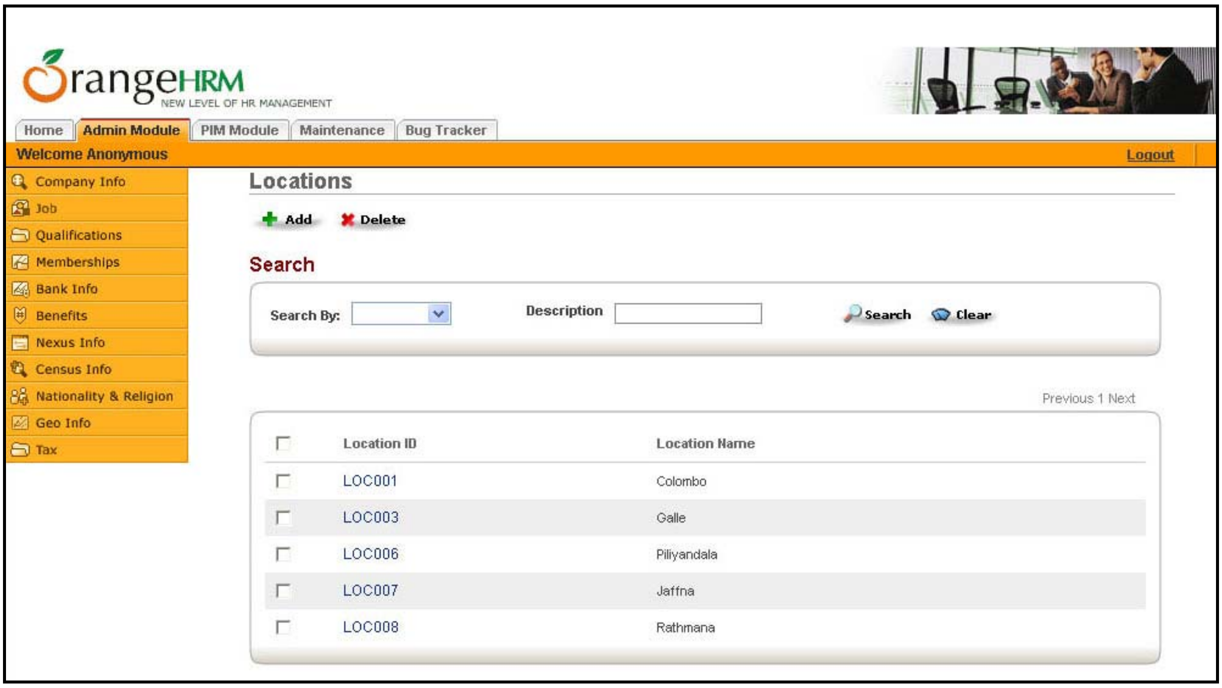

Figure 3.1

3.1 Company Info

All information related to the company is provided through the **Company Info**. Select **Company Info** from the Admin Module menu. The sub menu which consists of the following commands would be displayed.

- Hierarchy Definition
- Company Hierarchy
- Cost Centers
- Locations

3.1.1 Locations

The Location Information is displayed in Figure 3.2. This holds information of locations of the various departments/divisions/companies that are geographically dispersed.

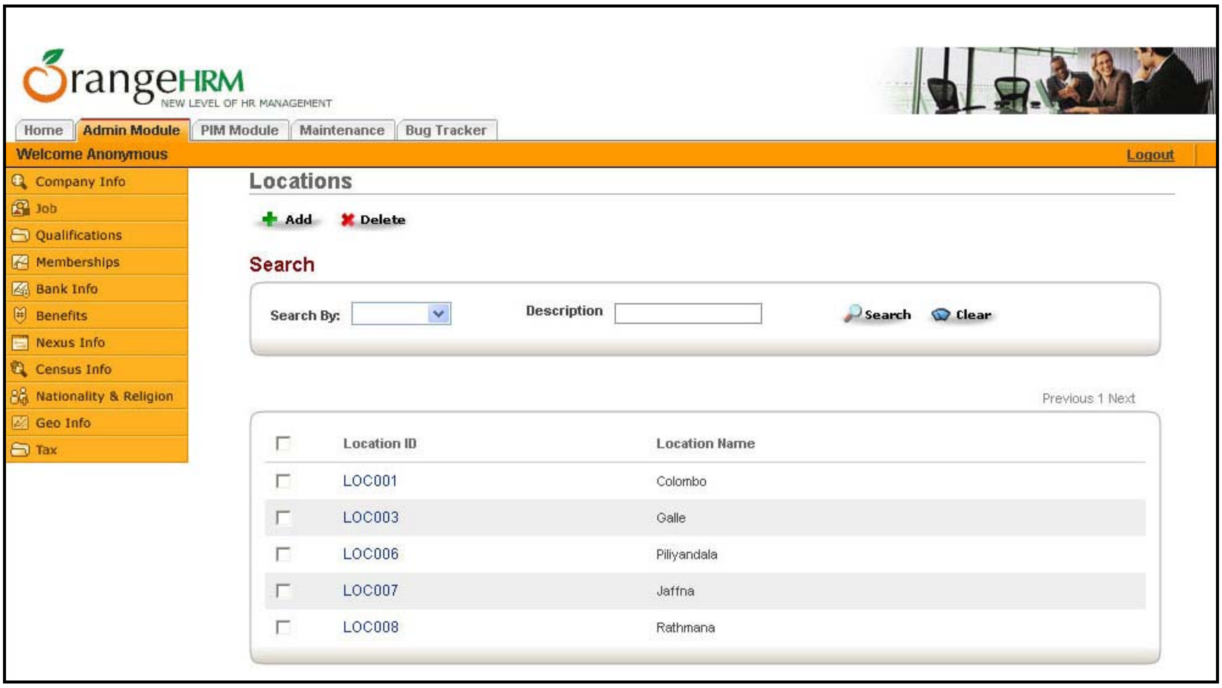

Figure 3.2

A search can be done on Locations based on Location ID or Location Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Locations. Click on the P**revious** link to move to the previous page of Locations.

3.1.1.1 Add Location

This would allow the addition of a Location. Click on **Add** button in the Locations page. The page used to add a Location is displayed in Figure 3.3.

1. Location ID is automatically generated.
2. Enter the Description (Location name)

Click **Save** button. If the save is successful, the Locations page is displayed with a 'Addition Successful' notification.

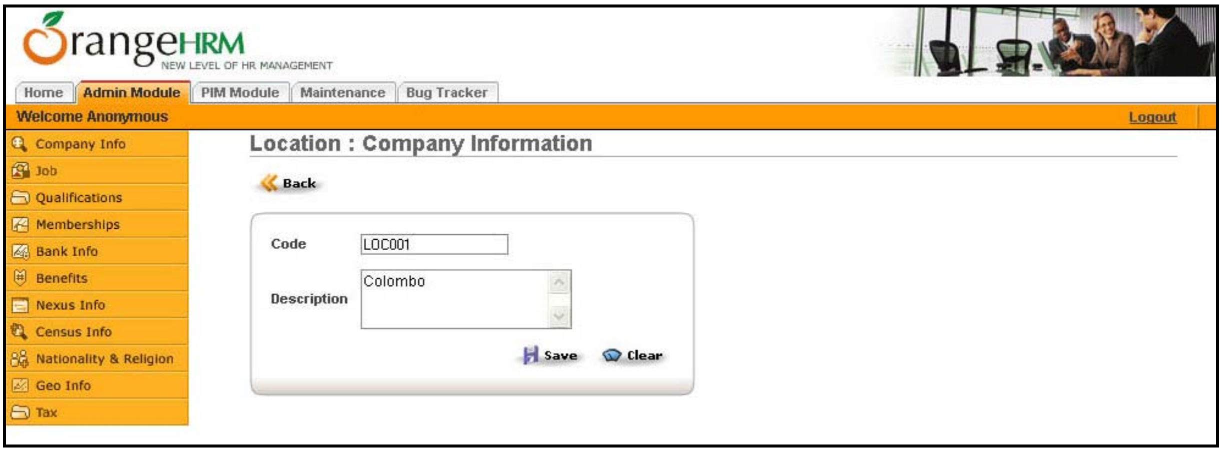

Figure 3.3

3.1.1.2 Edit Location

Click on the Location ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.1.1.3 Delete Location

This would allow the user to delete a Location. Click on the checkbox against the Location ID to be deleted and click **Delete** button. Multiple locations could be deleted simultaneously.

3.1.2 Hierarchy Definition

The Hierarchy Definition is displayed in Figure 3.4. The different levels of the organization would have to be defined in the system which would form the basis for the description of the Company Hierarchy in the next section.

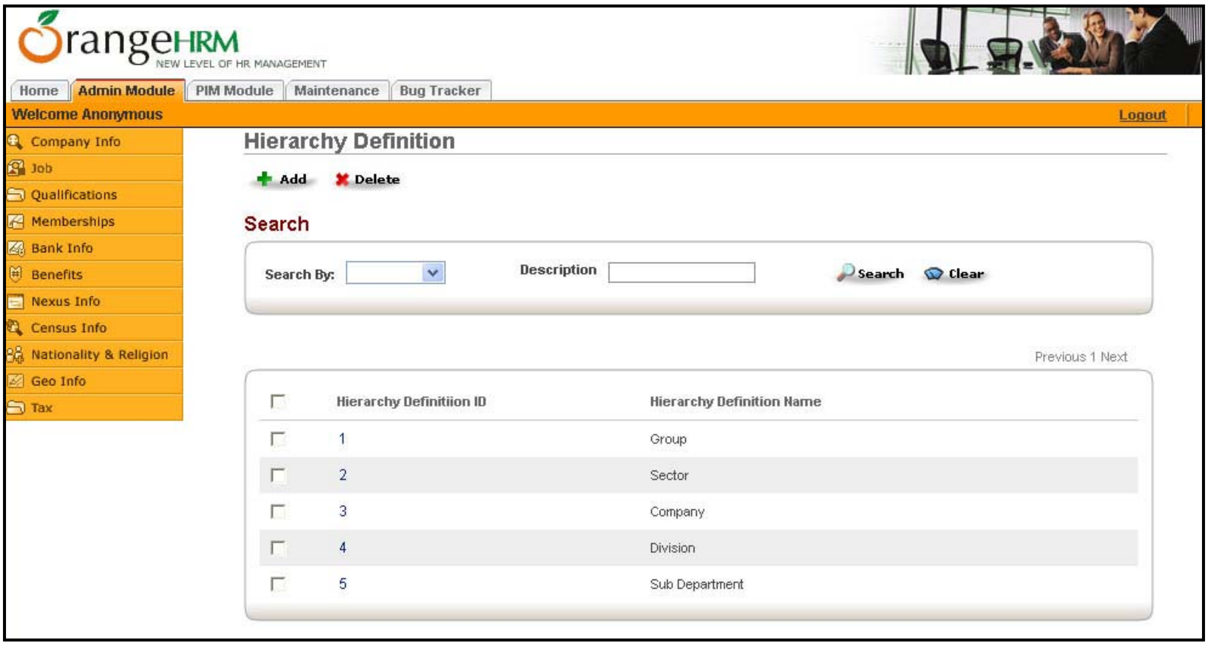

Figure 3.4

A search can be done on Hierarchy Definition based on Hierarchy Definition ID or Hierarchy Definition Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Hierarchy Definition. Click on the **Previous** link to move to the previous page of Hierarchy Definition.

3.1.2.1 Add Hierarchy Definition

This would allow the addition of a Hierarchy Definition. Click on **Add** button in the Hierarchy Definition page. The page used to add Hierarchy Definition is illustrated in Figure 3.5.

1. Hierarchy Definition ID is automatically generated.
2. Enter the Description (Definition Name)

Click **Save** button. If the save is successful, the Hierarchy Definition page is displayed with a 'Addition Successful' notification.

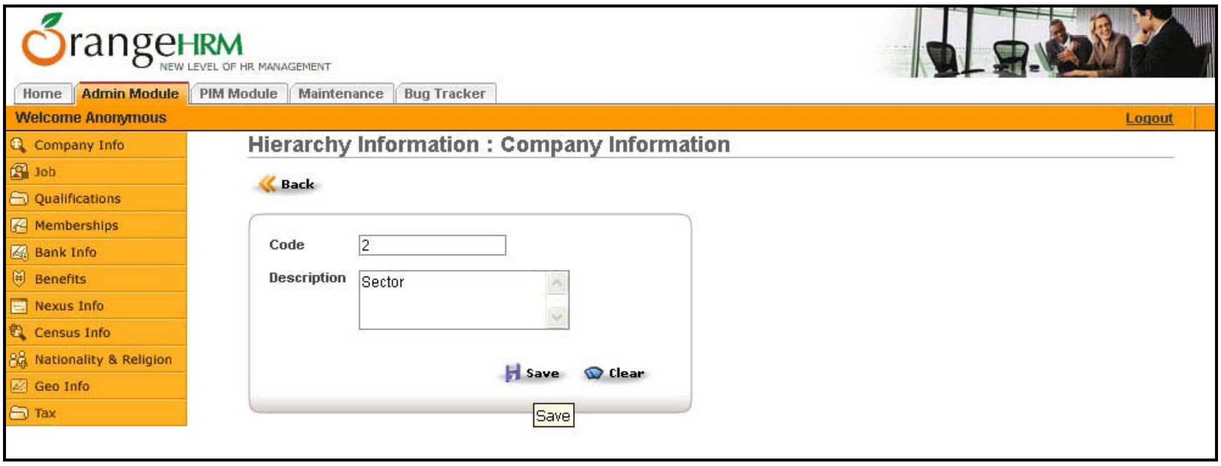

Figure 3.5

3.1.2.2 Edit Hierarchy Definition

Click on the Hierarchy Definition ID that needs to be edited. Click **Edit** button, make the necessary changes and click **Save** button.

3.1.2.3 Delete Hierarchy Definition

This would enable the user to delete a Hierarchy Definition. Click on the checkbox against the hierarchy definition ID to be deleted and click **Delete** button. Multiple hierarchy definitions could be deleted simultaneously.

3.1.3 Company Hierarchy

The Company Hierarchy Information is displayed in Figure 3.6. This describes the hierarchical structure of the organization defined in the previous section.

NOTE: The Locations of the various departments/divisions/companies of the organization that are geographically dispersed should be entered first before attempting to add a Company Hierarchy. Refer Section 3.1.1.1 to add a Location.

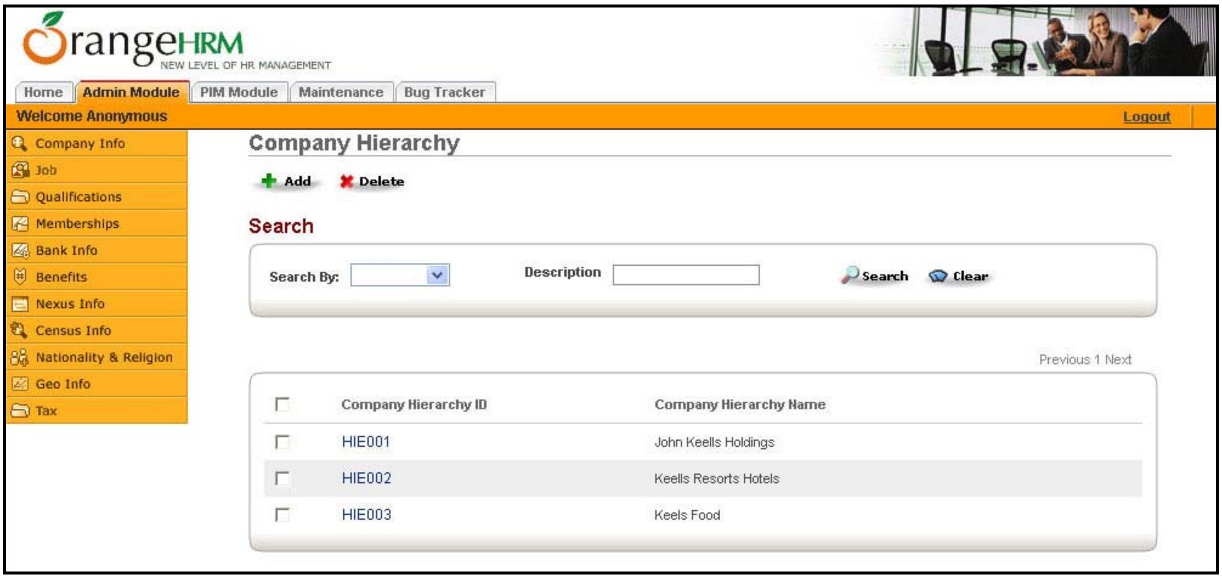

Figure 3.6

A search can be done on Company Hierarchy based on Company Hierarchy ID or Company Hierarchy Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Company Hierarchy. Click on the **Previous** link to move to the previous page of Company Hierarchy.

3.1.3.1 Add Company Hierarchy

This would allow the addition of a Company Hierarchy. Click on **Add** button in the Company Hierarchy page. The page used to add a Company Hierarchy is displayed in Figure 3.7.

1. Company Hierarchy ID is automatically generated.
2. Enter Description (Company Hierarchy Name)
3. Select a Relational Hierarchy
4. Select an employee
5. Select a Definition Level
6. Enter Telephone number
7. Enter Fax Number
8. Enter Email
9. Enter URL
10. Enter Logo

11. Select a Location

Click **Save** button. If the save is successful, the Company Hierarchy page is displayed with a 'Addition Successful' notification.

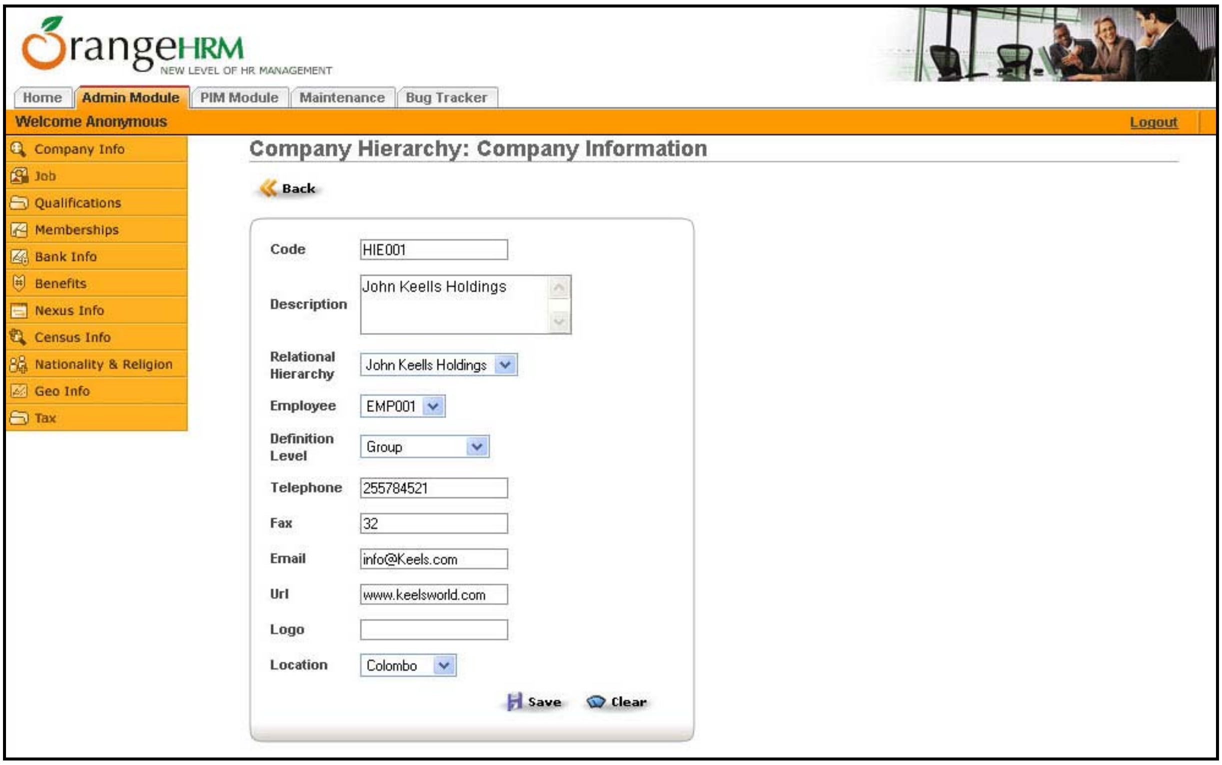

Figure 3.7

3.1.3.2 Edit Company Hierarchy

Click on the Company Hierarchy ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.1.3.3 Delete Company Hierarchy

This would enable the user to delete a Company Hierarchy. Click on the checkbox against the relative Company Hierarchy ID to be deleted and click **Delete** button. Multiple Company Hierarchies could be deleted simultaneously.

3.1.4 Cost Centers

The Cost Centers page is displayed in Figure 3.8. This identifies the various divisions of the organization in terms of costs incurred within a company/division which are allocated to different cost centers.

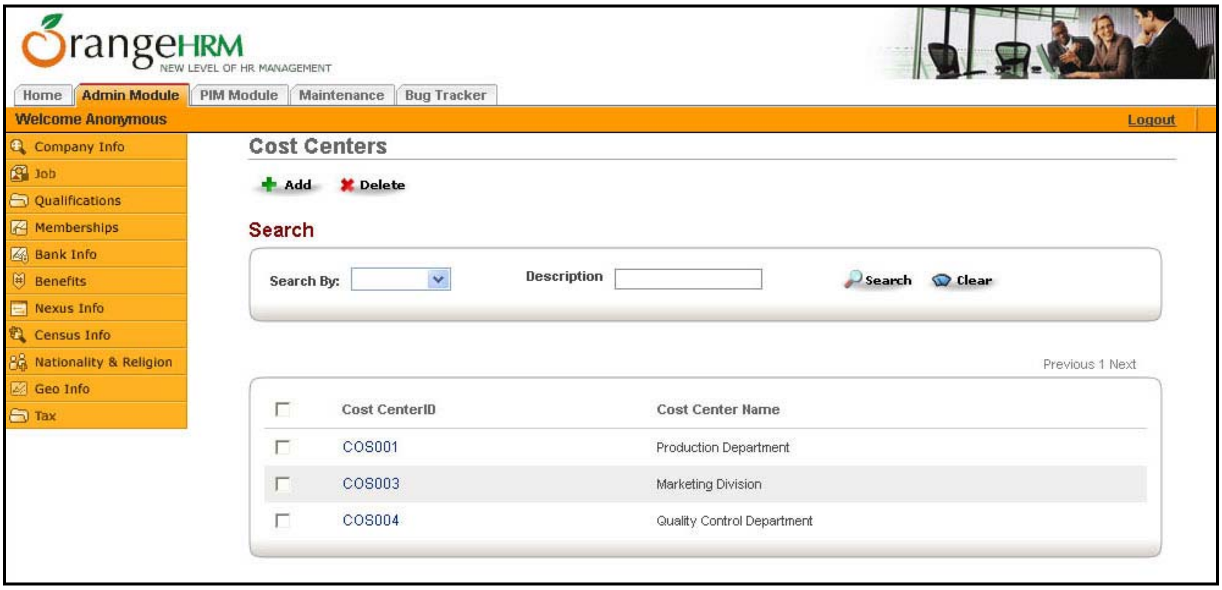

Figure 3.8

A search can be done on Cost Centers based on Cost Centers ID or Cost Center Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Cost Centers. Click on the **Previous** link to move to the previous page of Cost Centers.

3.1.4.1 Add Cost Center

This would enable the addition of a Cost Center. Click on **Add** button in the Cost Center page. The page used to add a Cost Center is illustrated in Figure 3.9.

1. Cost Center ID is automatically generated.
2. Enter the Description (Cost Center)

Click **Save**. If the save is successful, the Cost Center page is displayed with a 'Addition Successful' notification.

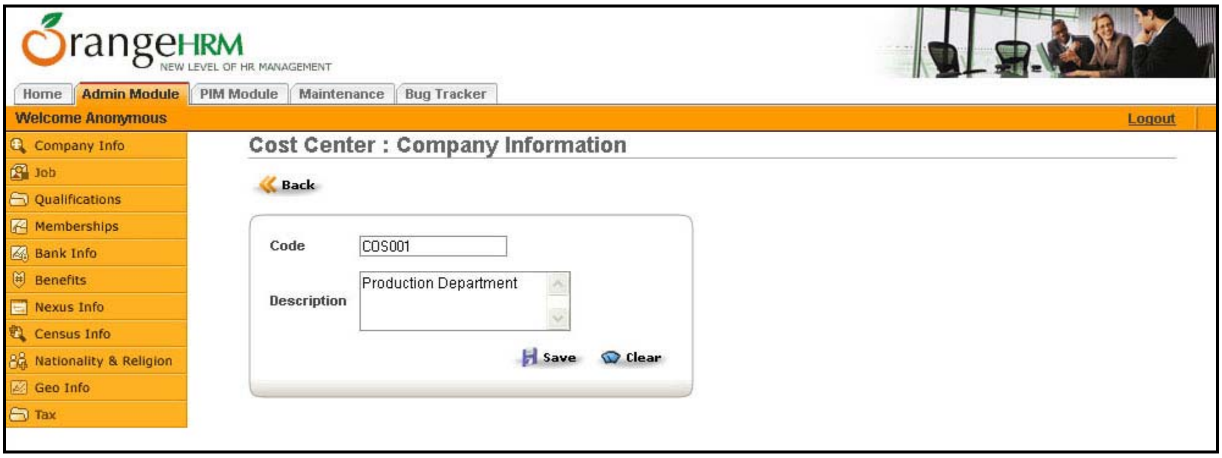

Figure 3.9

3.1.4.2 Edit Cost Center

Click on the Cost Center ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button

3.1.4.3 Delete Cost Center

This would allow the user to delete a Cost Center. Click on the checkbox against the Cost Center ID to be deleted and click **Delete** button. Multiple Cost Centers could be deleted simultaneously.

3.2 Job

All information related to a Job could be handled by selecting Job from the menu. The sub menu which consists of the following commands would be displayed under three categories.

Job Information

- Salary Grade
- Corporate Titles
- Designations
- Currency Types

Job Profile

- JD Category
- JD Types
- JD Key result Area

Designation Profile

- Designation Description
- Designation Qualification

3.2.1 Currency Types

The Currency Types page is displayed in Figure 3.10. This page is used to maintain information regarding Currency Types.

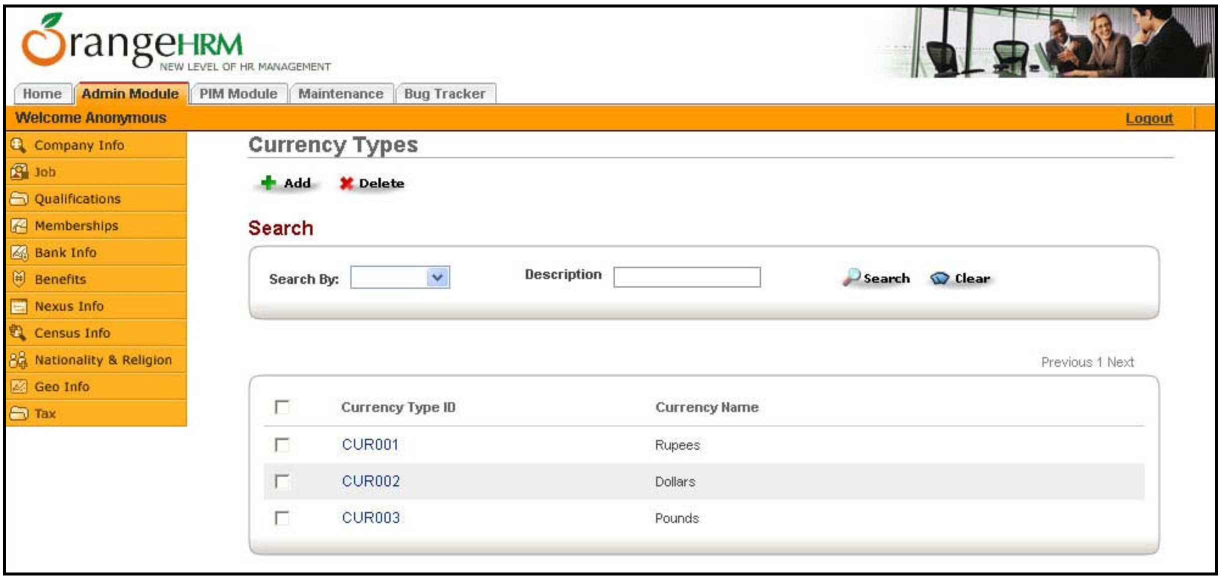

Figure 3.10

A search can be done on Currency Types based on Currency Type ID and Currency Type Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Currency Types. Click on the **Previous** link to move to the previous page of Currency Types.

3.2.1.1 Add Currency Type

This would enable the addition of a Currency Type. Click on **Add** button in the Currency Type page. The page used to add a Currency Type is displayed in Figure 3.11.

1. Currency Type ID is automatically generated.
2. Enter the Description

Click **Save button**. If the save is successful, the Currency Type page is displayed with a 'Addition Successful' Notification.

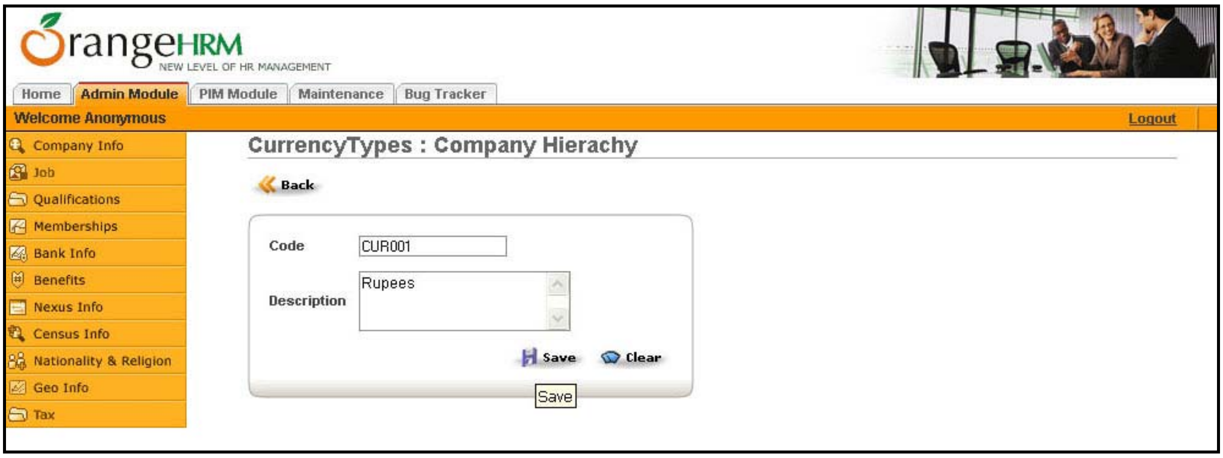

Figure 3.11

3.2.1.2 Edit Currency Type

Click on the Currency Type that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.2.1.3 Delete Currency Type

This would enable the user to delete a Currency Type. Click on the checkbox against the Currency Type ID to be deleted and click **Delete** button. Multiple Currency Types could be deleted simultaneously.

3.2.2 Salary Grade

The Salary Grade page is displayed in Figure 3.12. This page is used to maintain information regarding salary grades and also to make currency assignments to salary grades.

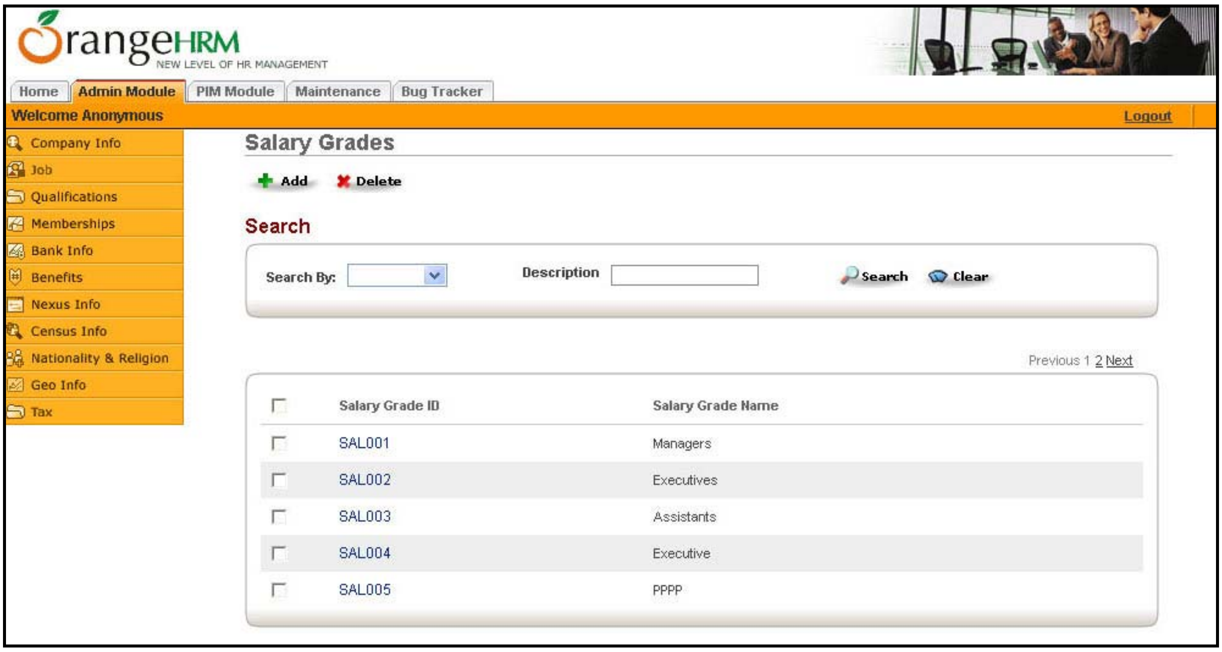

Figure 3.12

A search can be done on Salary Grades based on Salary Grade ID or Salary Grade Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Salary Grades. Click on the **Previous** link to move to the previous page of Salary Grades.

3.2.2.1 Add Salary Grade

This would enable the addition of a Salary Grade. Click on **Add** button in the Salary Grade page. The page used to add a Salary Grade is displayed in Figure 3.13.

1. Salary Grade ID is automatically generated.
2. Enter the Description (Salary Grade)

Click **Save button**. If the save is successful, the Currency Assignment to Salary Grade page is displayed. The currency assignment could be skipped.

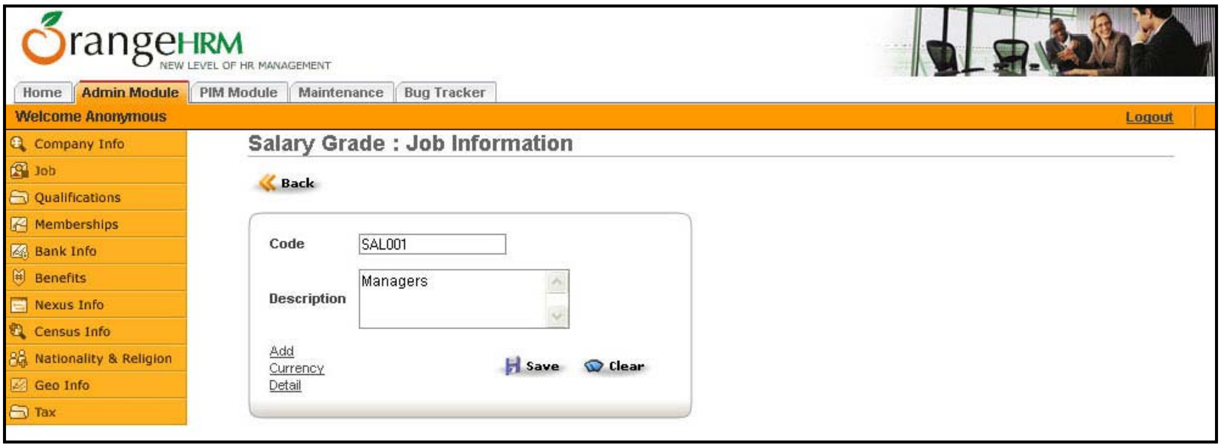

Figure 3.13

3.2.2.2 Edit Salary Grade

Click on the Salary Grade ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.2.2.3 Delete Salary Grade

This would enable the user to delete a Location. Click on the checkbox against the Salary Grade ID to be deleted and click **Delete** button. Multiple Salary Grades could be deleted simultaneously.

3.2.2.4 Currency Assignment to Salary Grade

Currency Assignment to Salary Grade could be done using two methods.

- Immediately after a new salary grade is added, a currency assignment could be performed
- Or, alternatively, by clicking on the Salary Grade ID and then clicking on **Add Currency Detail** link.

NOTE: Before a Currency Assignment is made, the currency should be added to the system. Refer Section 3.2.1.1 to add Currency.

All Currency Assignments made to a particular Salary Grade would be displayed in the 'Assigned Currency' section. Multiple Currency Assignments could be made to a single Salary Grade.

1. Select Currency
2. Enter Minimum Salary
3. Enter Maximum Salary

Click **Save** button. If the save is successful, the new entry is displayed in the 'Assigned Currency' section.

3.2.2.5 Edit Assigned Currency

1. On the Salary Grade page, click on Salary Grade ID of the assigned currency to be edited.
2. Then click **Add Currency Detail** link.
3. In the 'Assigned Currency' section click on the Currency that is to be edited.
4. Click on **Edit** button, select the currency make the necessary changes and then click **Save** button.

3.2.2.6 Delete Assigned Currency

1. On the Salary Grade page, click on Salary Grade ID of the assigned currency to be deleted.
2. Then click **Add Currency Detail** link.
3. In the 'Assigned Currency' section click on the checkbox against the Currency to be deleted. Multiple Currencies could be deleted simultaneously.

3.2.3 Corporate Titles

The Corporate Titles page is displayed in Figure 3.14. Corporate Titles refers to the different types of Corporate Titles held by employees in the organization.

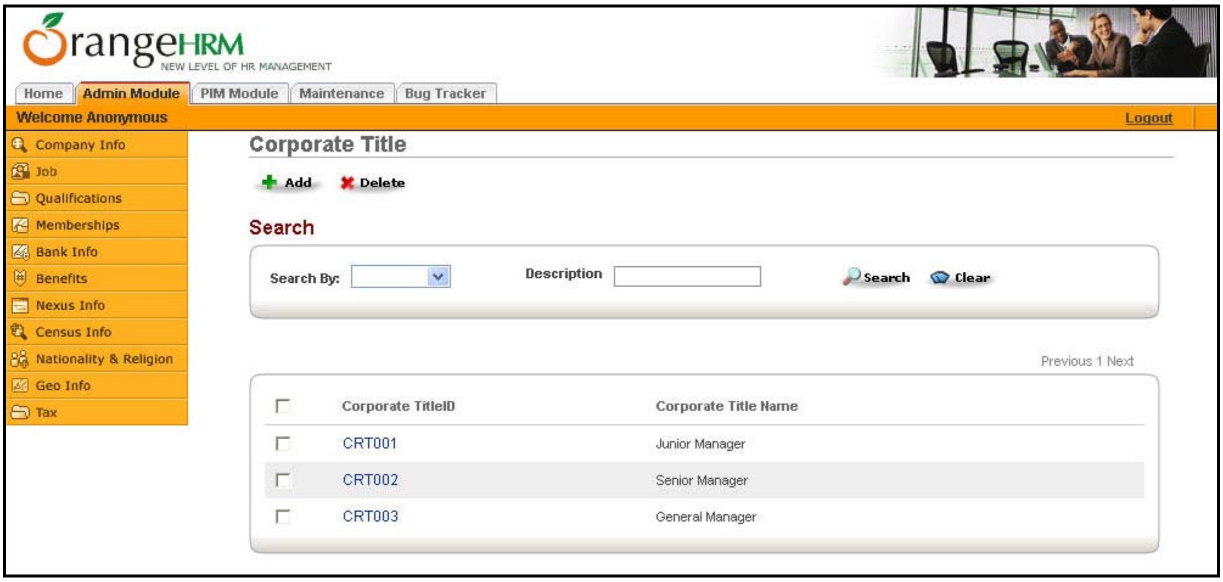

Figure 3.14

A search can be done on Corporate Titles based on Corporate Titles ID or Corporate Title Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Corporate Titles. Click on the **Previous** link to move to the previous page of Corporate Titles.

3.2.3.1 Add Corporate Title

This would allow the addition of a Corporate Title. Click on **Add** button in the Corporate Title page. The page used to add a Corporate Title is displayed in Figure 3.15.

NOTE: It is important to have entered the Salary Grades to the system before adding Corporate Titles. Refer Section 3.2.2.1 to add Salary Grade.

1. Corporate Title ID is automatically generated.
2. Enter Description (Corporate Title)
3. Click on checkbox Top in Hierarchy if this Title is the top in hierarchy.
4. Click on checkbox Multiple Heads if more than one person included in this particular Corporate Title
5. Enter Head Count (if Multiple Heads is checked)
6. Select Next Level Upgrade (Next Designation in Designation Hierarchy)

7. Select Salary Grade

8. Enter Review Date (Next Review Date of Corporate Title)

9. Select Hierarchy Level

Click on **Save** button. If the save is successful, the Corporate Titles page is displayed with a 'Addition Successful' notification.

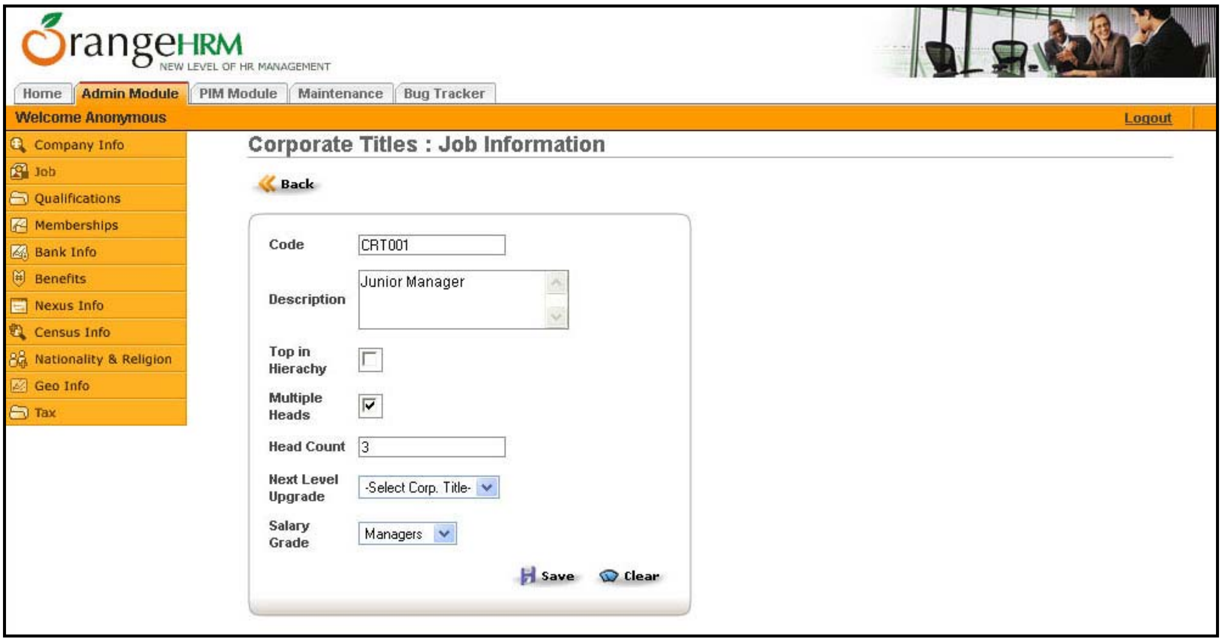

Figure 3.15

3.2.3.2 Edit Corporate Title

Click on the Corporate Title ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.2.3.3 Delete Corporate Title

This would enable the user to delete a Corporate Title. Click on the checkbox against the Corporate Title ID to be deleted and click **Delete** button. Multiple Corporate Titles could be deleted simultaneously.

3.2.4 Designations

The Designations page is displayed in Figure 3.16. This can be selected from the Job menu. This page is used to maintain information regarding the designations of employees in the organization.

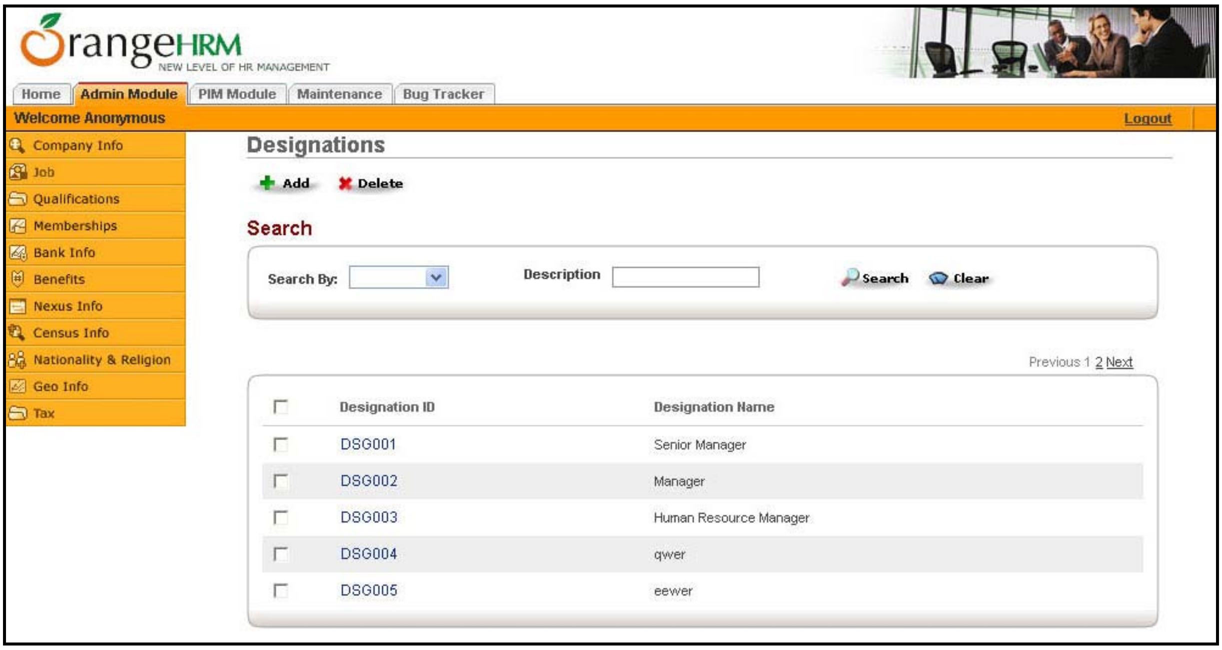

Figure 3.16

A search can be done on Designations based on Designations ID or Designations Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Designations. Click on the **Previous** link to move to the previous page of Designations.

3.2.4.1 Add Designation

This would allow the addition of a Designation. Click on **Add** button in the Designations page. The page used to add a Designation is displayed in Figure 3.17.

1. Designation ID is automatically generated
2. Enter Description
3. Select Corporate Title
4. Click on checkbox Senior Management if designation included in Senior Management.

5. Enter Review Date (Next review date of Designation)

6. Select Next Upgrade Level (Next Designation in Hierarchy)

Click on **Save button**. If the Save is successful, the Designations page is displayed with a 'Addition Successful' notification.

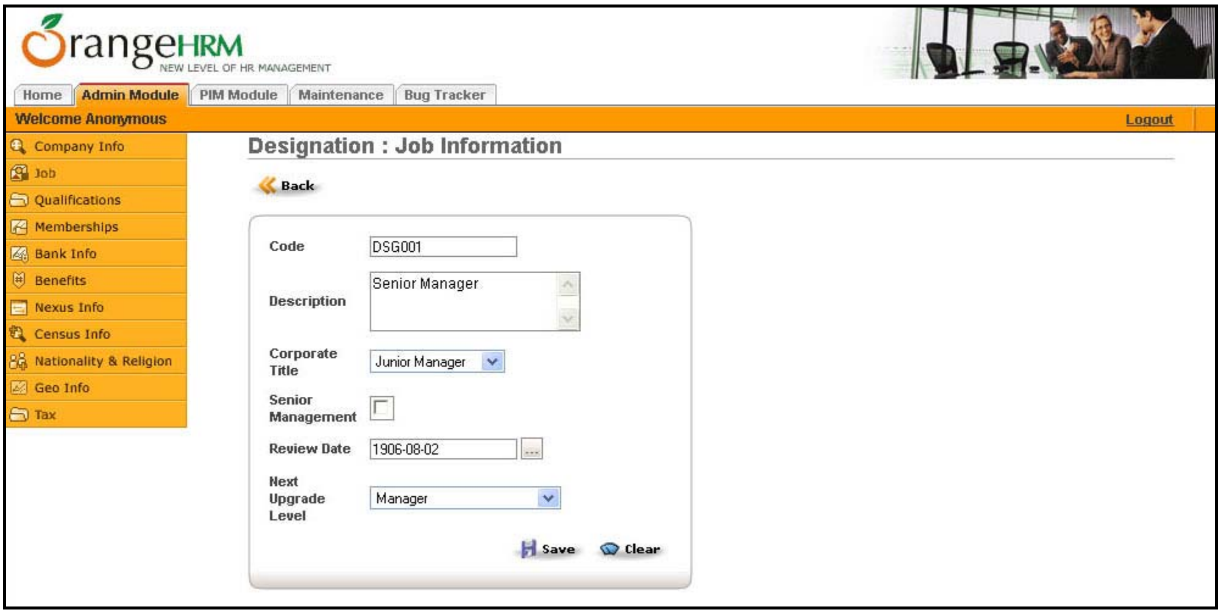

Figure 3.17

3.2.4.2 Edit Designation

Click on the Designation ID of the relative Designation Name that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.2.4.3 Delete Designation

This would allow the user to delete a Designation. Click on the checkbox against the Designation ID to be deleted and click on **Delete** button.

3.2.5 JD Category

The Job Description Category page is displayed in Figure 3.18. The JD category identifies the different levels of the personnel in the organizational structure such as for example, management level etc.

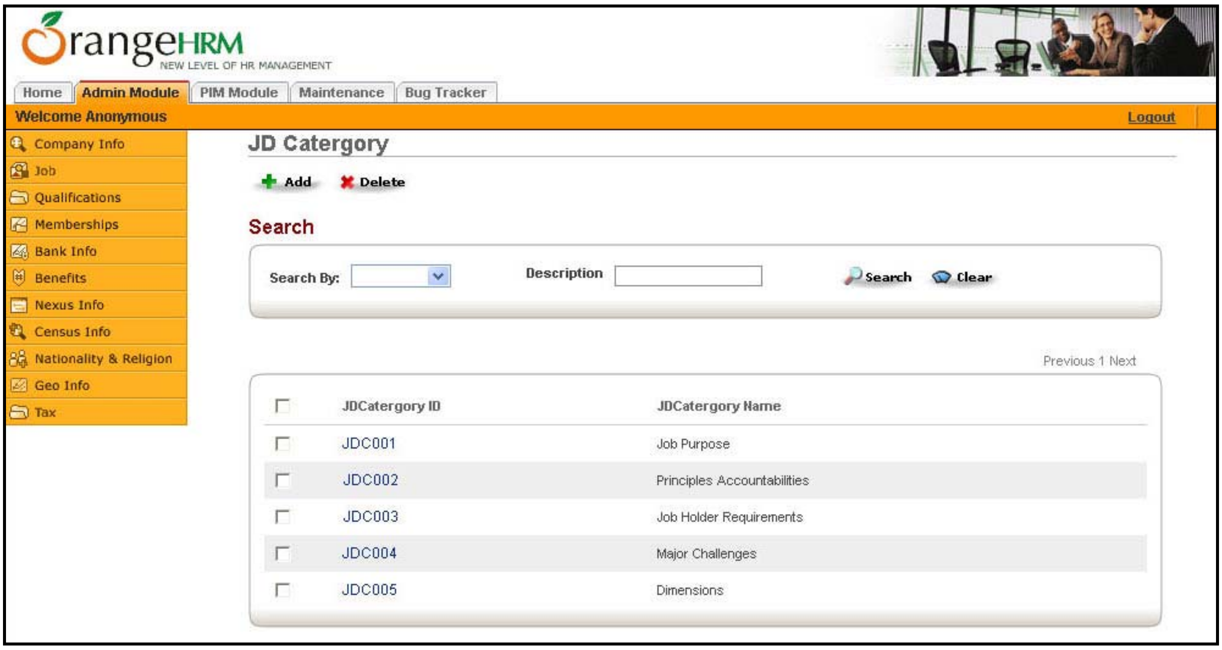

Figure 3.18

A search can be done on JD Category based on JD Category ID or JD Category Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of JD Category. Click on the **Previous** link to move to the previous page of JD Category.

3.2.5.1 Add JD Category

This would allow the addition of a JD Category. Click on **Add** button in the JD Category page. The page used to add a Designation is illustrated in Figure 3.19.

1. JD Category ID is automatically generated.
2. Enter the Description

Click **Save** button. If the save is successful, the JD Category page is displayed with a 'Addition Successful' notification.

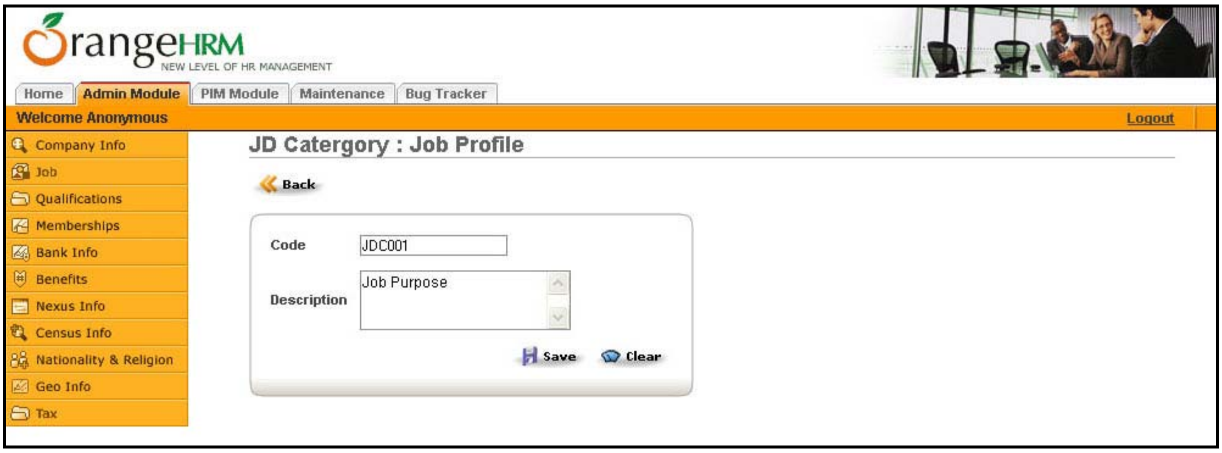

Figure 3.19

3.2.5.2 Edit JD Category

Click on the JD Category ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.2.5.3 Delete JD Category

This would allow the user to delete a JD Category. Click on the checkbox against the JD Category ID to be deleted and click **Delete** button. Multiple JD Categories could be deleted simultaneously.

3.2.6 JD Types

The Job Description Types page is displayed in Figure 3.20. The JD Types identify the various responsibilities that could be assigned to a particular JD Category.

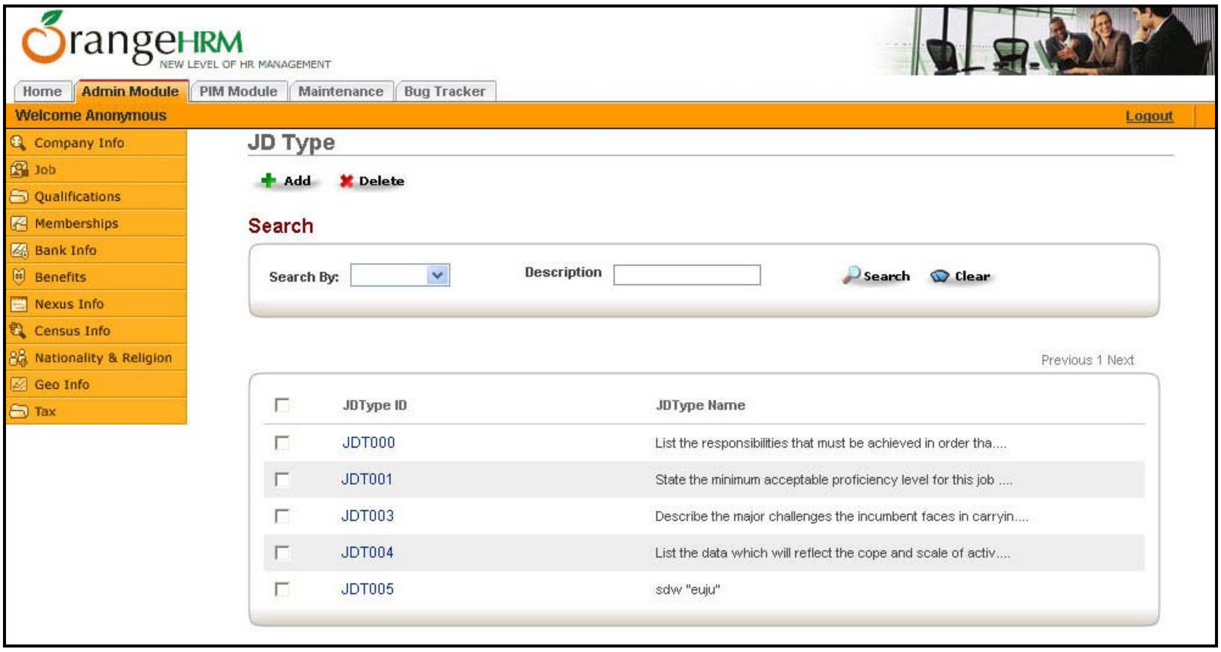

Figure 3.20

A search can be done on JD Type based on JD Type ID or JD Type Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of JD Type. Click on the **Previous** link to move to the previous page of JD Type.

3.2.6.1 Add JD Types

This would allow the addition of a JD Type. Click on **Add** button in the JD Type page. The page used to add a Designation is illustrated in Figure 3.21.

1. JD Type ID is automatically generated.
2. Enter the Description
3. Select the JD Category

Click **Save** button. If the save is successful, the JD Type is displayed with a 'Addition Successful' notification.

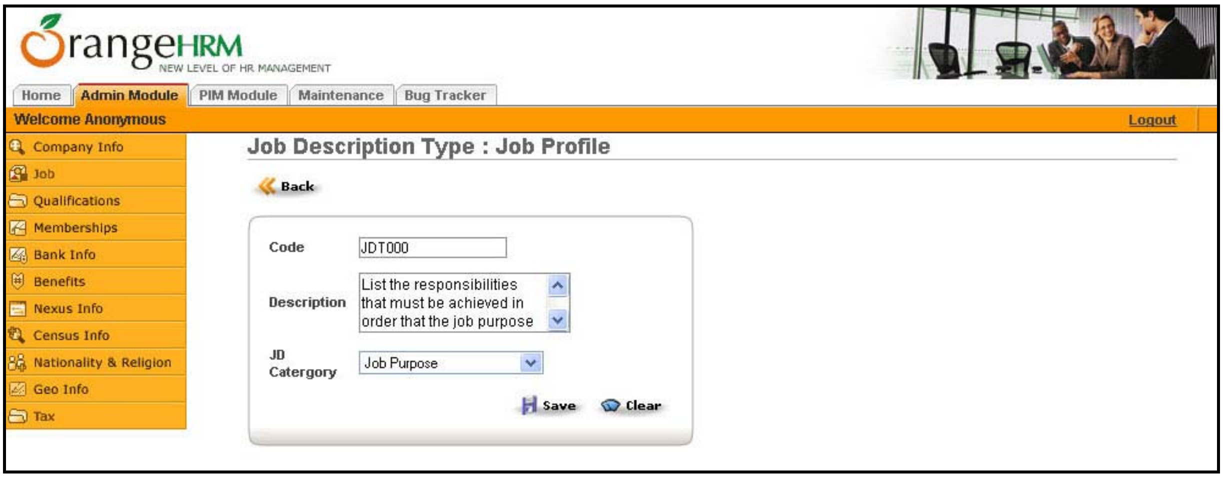

Figure 3.21

3.2.6.2 Edit JD Types

Click on the JD Type ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.2.6.3 Delete JD Types

This would allow the user to delete a JD Type. Click on the checkbox against the JD Type ID to be deleted and click **Delete** button. Multiple JD Types could be deleted simultaneously.

3.2.7 JD Key Result Area

The Job Description Types page is displayed in Figure 3.22. The JD Key result Area determines the responsibilities/tasks that are assigned to employees belonging to a particular JD Type.

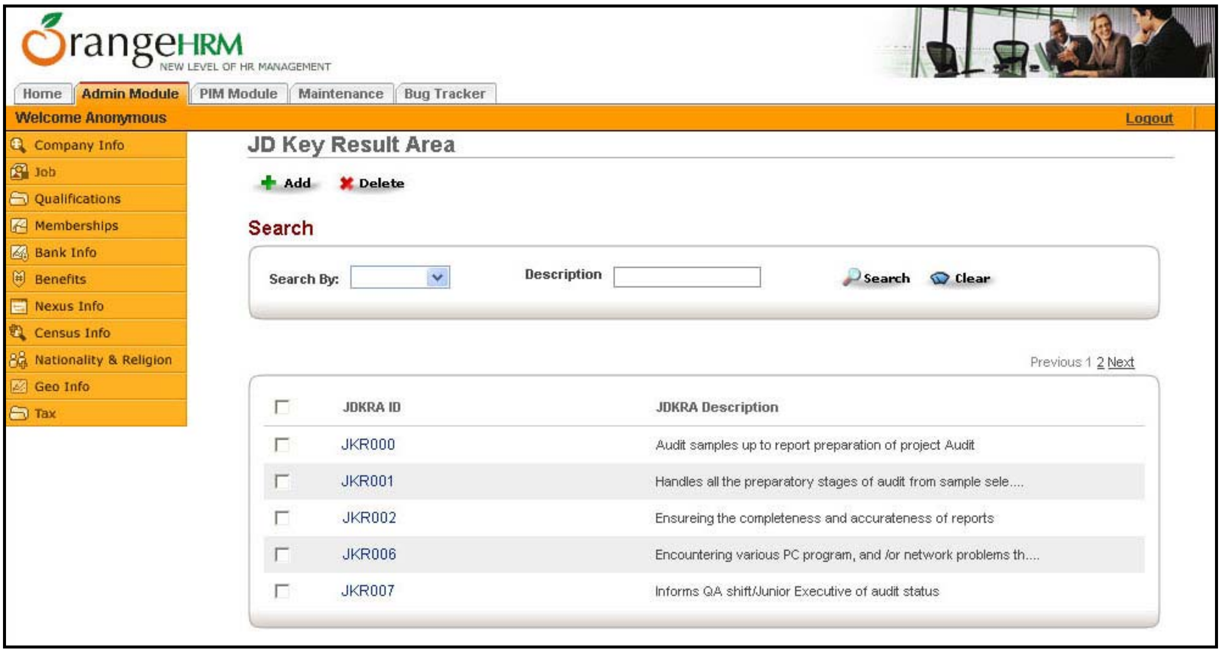

Figure 3.22

A search can be done on JD KRA based on JD KRA ID or JD KRA Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of JD KRA. Click on the **Previous** link to move to the previous page of JD KRA.

3.2.7.1 Add JD Key Result Area

This would allow the addition of a JD Key result Area. Click on **Add** button in the JD Key result Area page. The page used to add a Designation is illustrated in Figure 3.23.

1. JDKRA ID is automatically generated.
2. Enter the Description
3. Enter Brief Description
4. Select JD Type
5. Select Skill Type

Click **Save** button. If the save is successful, the JD Type is displayed with a 'Addition Successful' notification.

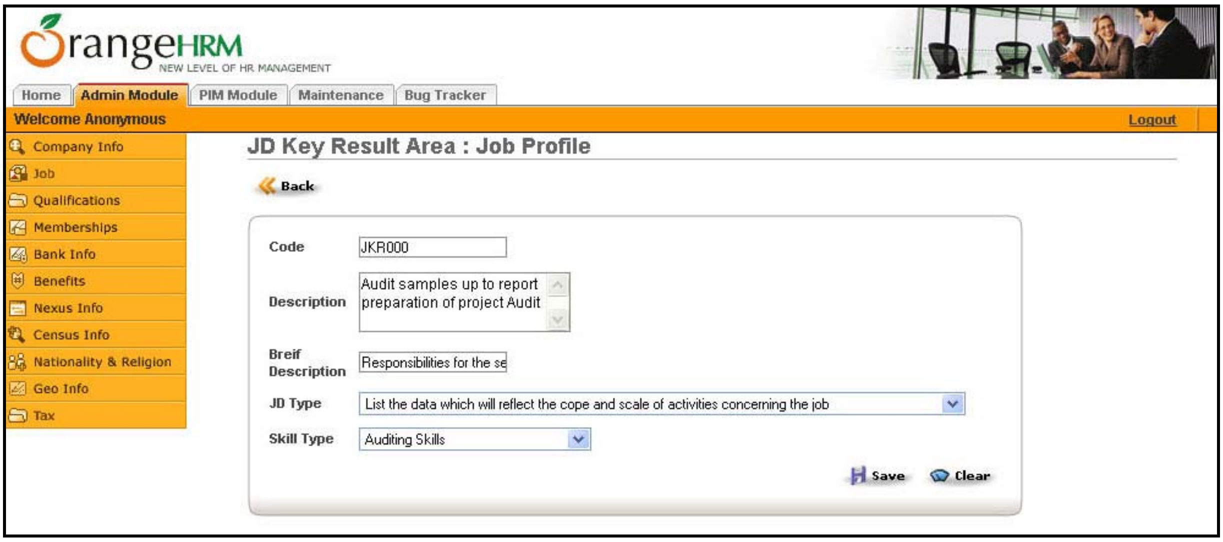

Figure 3.23

3.2.7.2 Edit JD Key Result Area

Click on the JDKRA ID of the relative JD KRA Description that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.2.7.3 Delete JD Key Result Area

This would allow the user to delete a JD Key Result Area. Click on the checkbox against the JDKRA ID to be deleted and click **Delete** button. Multiple JD Key Result Areas could be deleted simultaneously.

3.2.8 Designation Description

The Designation Description page is displayed in Figure 3.24. The Designation Description indicates all the responsibilities/tasks that are expected from a particular designation. Only designations that have been assigned with a minimum of one Key Result Area would be displayed on this page.

NOTE: This requires the Designation be already entered to the system. Refer Section 3.2.4.1 to add a Designation. The responsibilties/tasks denoted by Key Result Area should also be entered to the system before assigning Key Result Areas to a Designation. Refer section 3.2.7.1 on adding a Key Result Area.

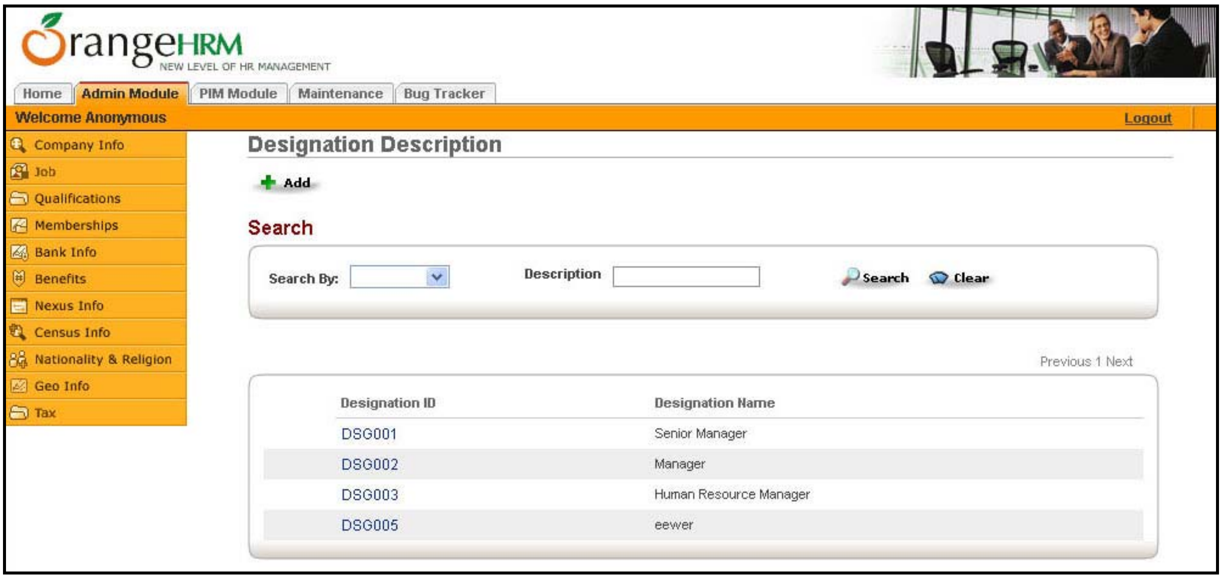

Figure 3.24

A search can be done on Designation Description based on Designation ID or Designation Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Designation Description. Click on the **Previous** link to move to the previous page of Designation Description.

3.2.8.1 Assign Key Result Area to Designation

If no Key Result Area has been assigned to a Designation that particular Designation would not be displayed on this page. Therefore, in order to proceed, it is important to have added that particular designation to this page.

If the Designation does not exist on this page :

1. Click on **Add** button in the Designation Description page. A page displaying all the Designations which have been assigned as well as not been assigned with a KRA would be shown. See Figure 3.25.
2. Click on the Designation ID that is to be added.
3. Click on **Add** button in the Assigned Key Result Areas section. All JD Key Result Areas that have not been assigned to this particular Designation would be displayed with the respective JD Category and JD Type.
4. Click on the checkbox of the JD Key Result Area to be added and click **Add** button. Multiple Key Result Areas can be assigned simultaneously.

If the Designation exists on the Designation Description page :

1. Click on the Designation ID for which the Key Result Area is to be assigned. As shown in figure the Assigned Key Results Areas for this Designation would be displayed with the respective JD Category and JD Type.

2. Click on **Add** and the Key Result Areas that have not been assigned to this Designation would be displayed.

3. Click on the checkbox of the JD Key Result Area to be added and click **Add** button. Multiple Key Result Areas can be assigned simultaneously.

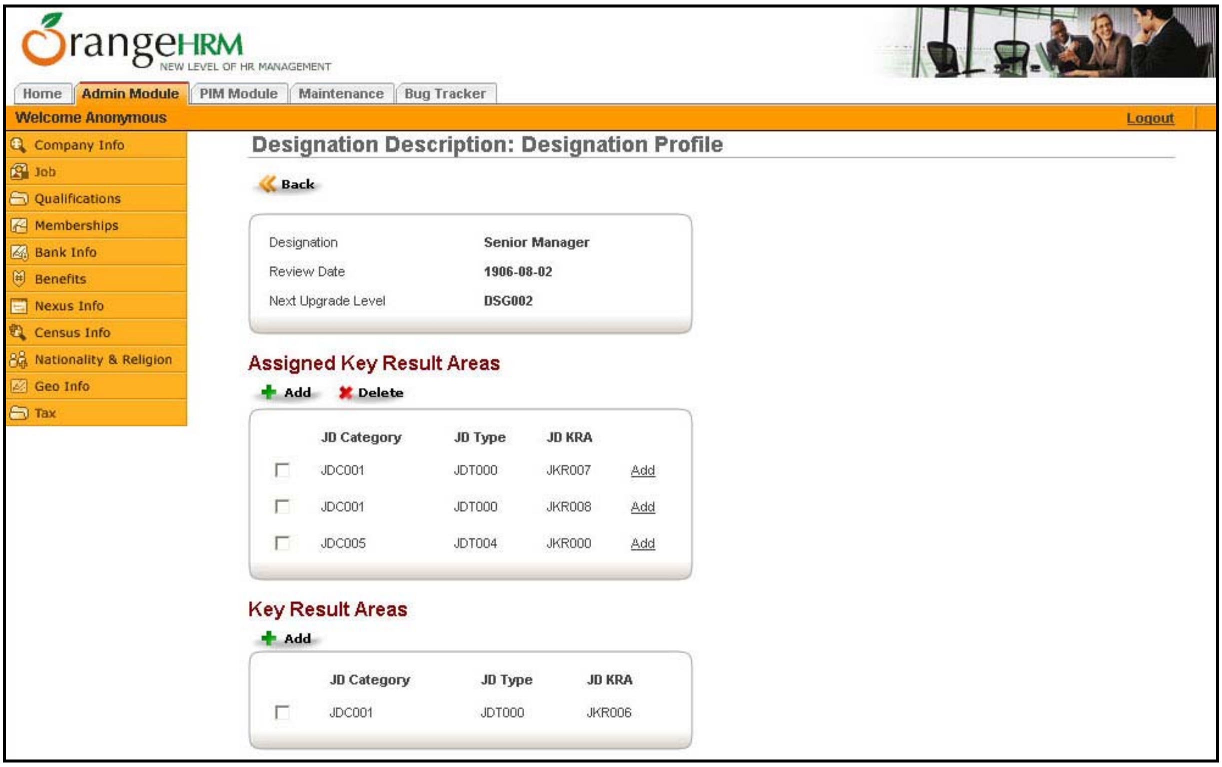

Figure 3.25

3.2.8.2 Delete Assigned Key Result Area to Designation

1. Click on the Designation ID for which the Key Result Area is to be deleted.

2. Click on the checkbox of the JD KRA to be deleted and click **Delete** button.

Multiple Key Result Areas can be removed simultaneously.

3.2.8.3 Add/Edit Key Performance Indicator for Assigned JD KRA

If a Key Performance Indicator has not been assigned for a JD KRA then an **Add** link would be displayed for that particular line. And for JD KRA's where performance indicators have been entered, a **Edit** link would be displayed. See Figure 3.26.

1. Click on **Add/View** link of the JD KRA

2. Click **Edit** button, enter performance indicator and click **Save** button.

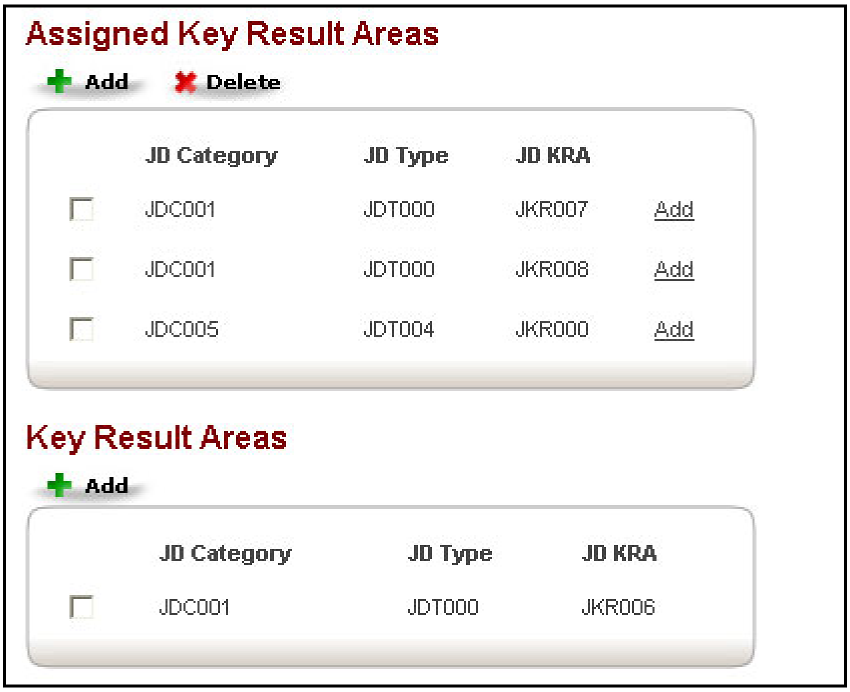

Figure 3.26

3.2.9 Designation Qualification

The Designation Qualification page is displayed in Figure 3.27. This indicates the qualifications that are required for a Designation. Only the designations which have been assigned with a minimum of at least one qualification would be displayed on this page.

NOTE: The relevant Designation should be entered to the system before assigning qualifications to it. Refer Section 3.2.4.1 to add a Designation. This also requires the qualifications be entered to the system. Refer Section 3.3.2.1 to add a qualification.

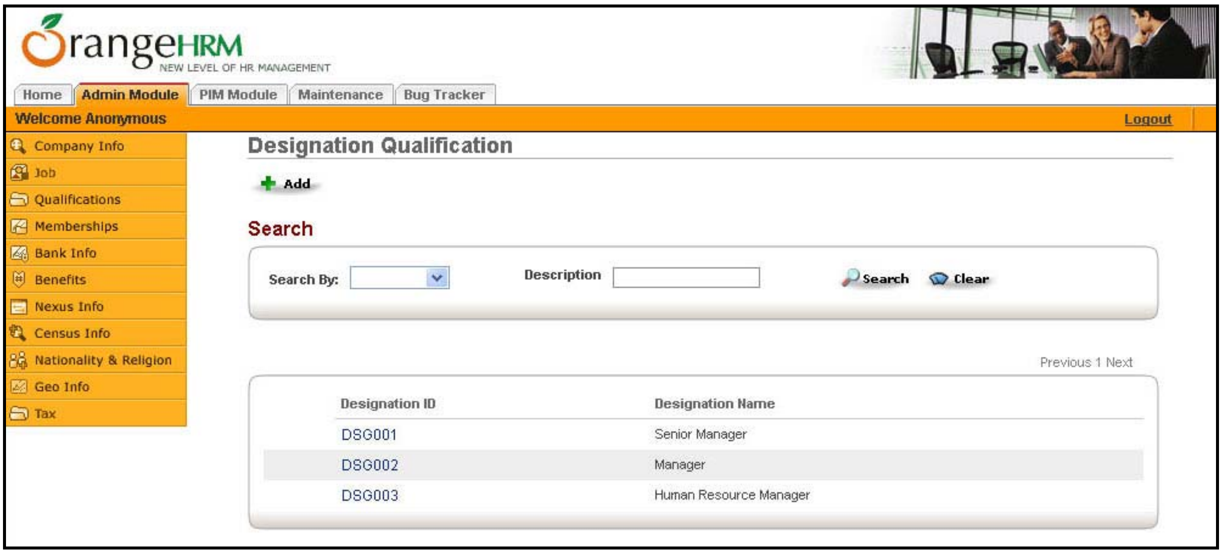

Figure 3.27

A search can be done on Designation Qualification based on Designation ID or Designation Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Designation Qualification. Click on the **Previous** link to move to the previous page of Designation Qualification.

3.2.9.1 Assign Qualification to Designation.

If no qualification has been assigned to a Designation that particular Designation would not be displayed on this page. Therefore, in order to proceed, it is important to have added that particular Designation to this page.

If the Designation does not exist on this page :

1. Click on **Add** button in the Designation Qualification page. A page displaying all the Designations which have not been assigned with at least a single qualification would be shown. See Figure 3.28.
2. Click on the Designation ID that is to be added.
3. Select Qualification, enter Institute and select Status
4. Click on **Save** button. The entry saved would now be added to the Assigned Qualifications.

If the Designation exists on this page :

1. Click on the Designation ID for which the qualification is to be assigned.
2. Select Qualification, Enter Institute, select Status
3. Click on **Save** button. The entry saved would now be added to the Assigned Qualifications.

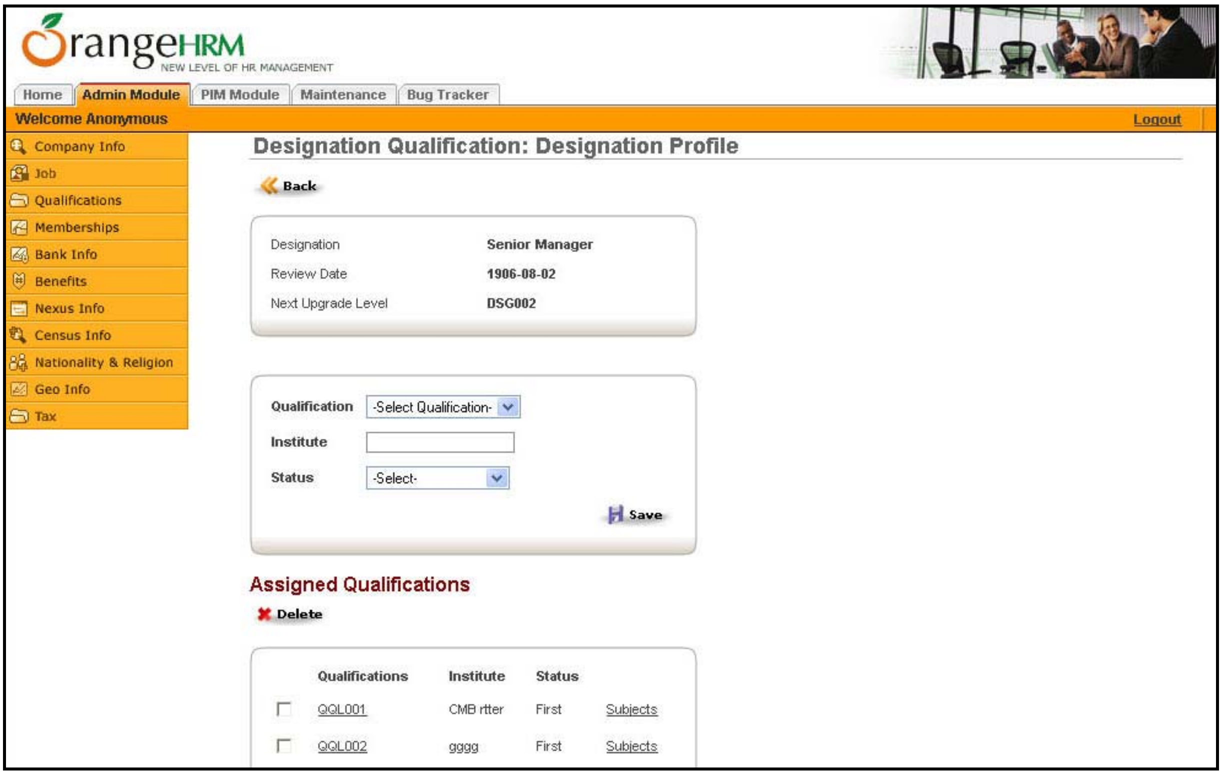

Figure 3.28

3.2.9.2 Edit Assigned Qualification

1. On the Designation Qualification page, click on the Designation ID of the assigned Qualification to be edited.
2. In the 'Assigned Qualifications' section click on the Qualification to be edited. See Figure 3.27
3. Click on **Edit** button, make the necessary changes and then click **Save** button.

3.2.9.3 Add Subjects to Assigned Qualifications

1. On the Designation Qualification page, click on the Designation ID of the assigned Qualification. See Figure 3.29.
2. Click on the Subjects link of the assigned qualification.
3. Select the Subject and Rating Grade and click on **Save** button**.**
4. Once saved, the subject is displayed in the 'Assigned Subjects' section.

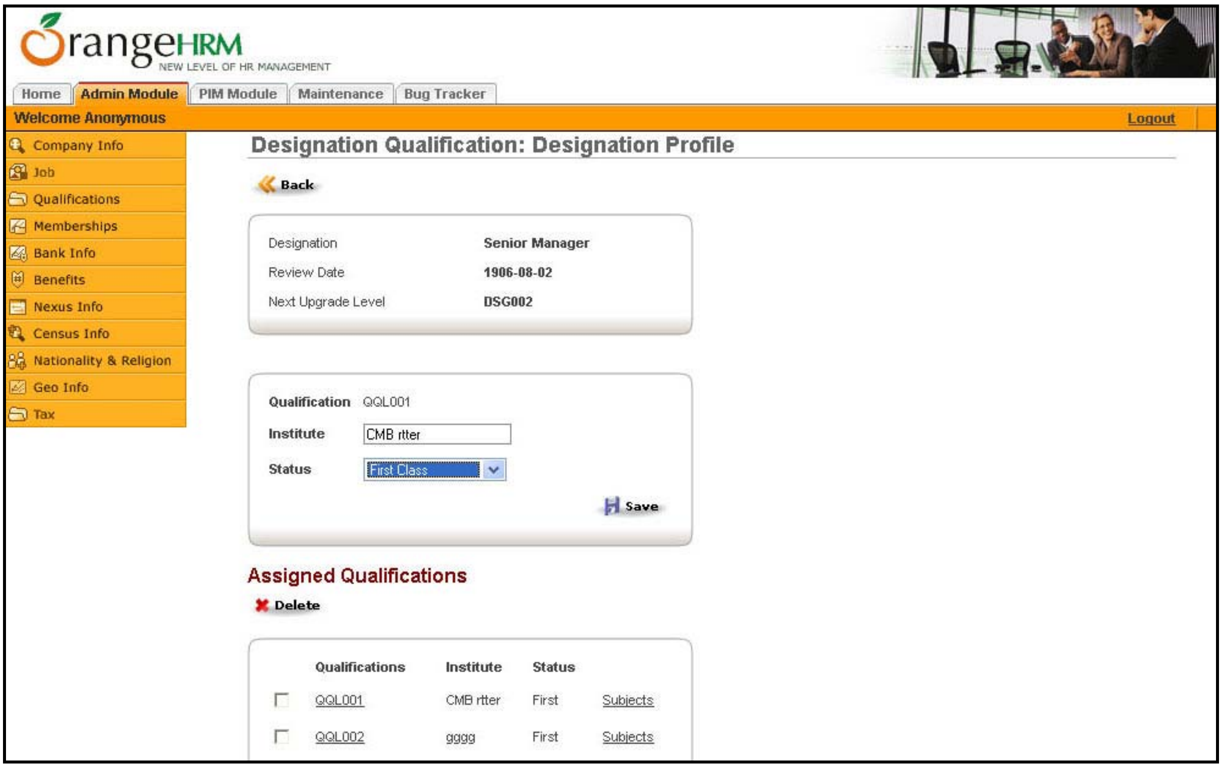

Figure 3.29

3.2.9.4 Edit Subjects of Assigned Qualifications

1. On the Designation Qualification page, click on the Designation ID of the assigned Qualification.
2. Click on the **Subjects** link of the assigned qualification.
3. Under Assigned Subjects, click on the Subject to be edited.
4. Click on **Edit** button, make necessary changes and click **Save** button.

3.2.9.5 Delete Subjects of Assigned Qualifications

1. On the Designation Qualification page, click on the Designation ID of the assigned Qualification.
2. Click on the Subjects link of the assigned qualification.
3. Under Assigned Subjects, click on the checkbox against the subject to be deleted and click on **Delete** button

3.2.9.6 Delete Assigned Qualification to Designation

Click on the checkbox against the Qualification ID to be removed and click **Delete** button. Multiple qualifications can be removed simultaneously.

3.3 Qualifications

All information related to qualifications could be handled by selecting Qualifications from the menu. The sub menu consists of the following commands.

- Qualification Types
- Qualifications
- Rating Methods
- Subjects
- Skills
- Languages
- Sub Skills
- Extra Curricular Activity Category
- Extra Curricular Activity Type

3.3.1 Rating Methods

The Rating Methods page is displayed in Figure 3.30. Rating methods of a qualification and grades that could be obtained by an employee are defined in the System.

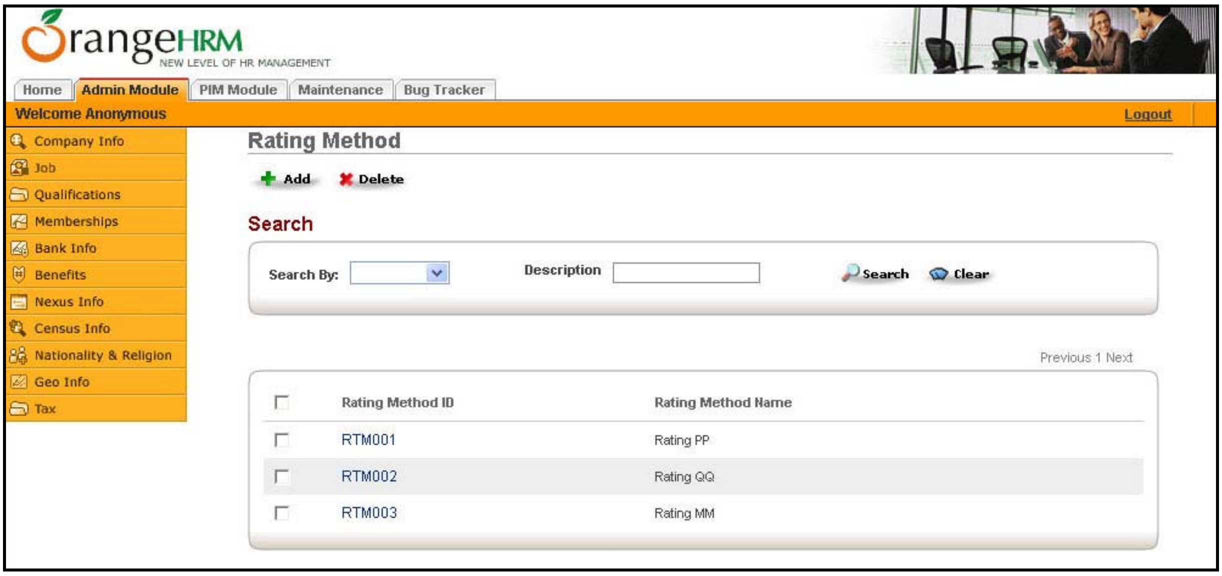

Figure 3.30

A search can be done on Rating Type based on Rating Type ID or Rating Type Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Rating Type. Click on the **Previous** link to move to the previous page of Rating Type.

3.3.1.1 Add Rating Type

This would allow the addition of a Rating Type. Click on **Add** button in the Rating Type page.

1. Rating Type ID is automatically generated.
2. Enter the Description (Rating Type Name)

Click **Save button**. If the save is successful, the Rating Type page is displayed with a 'Addition Successful' Notification.

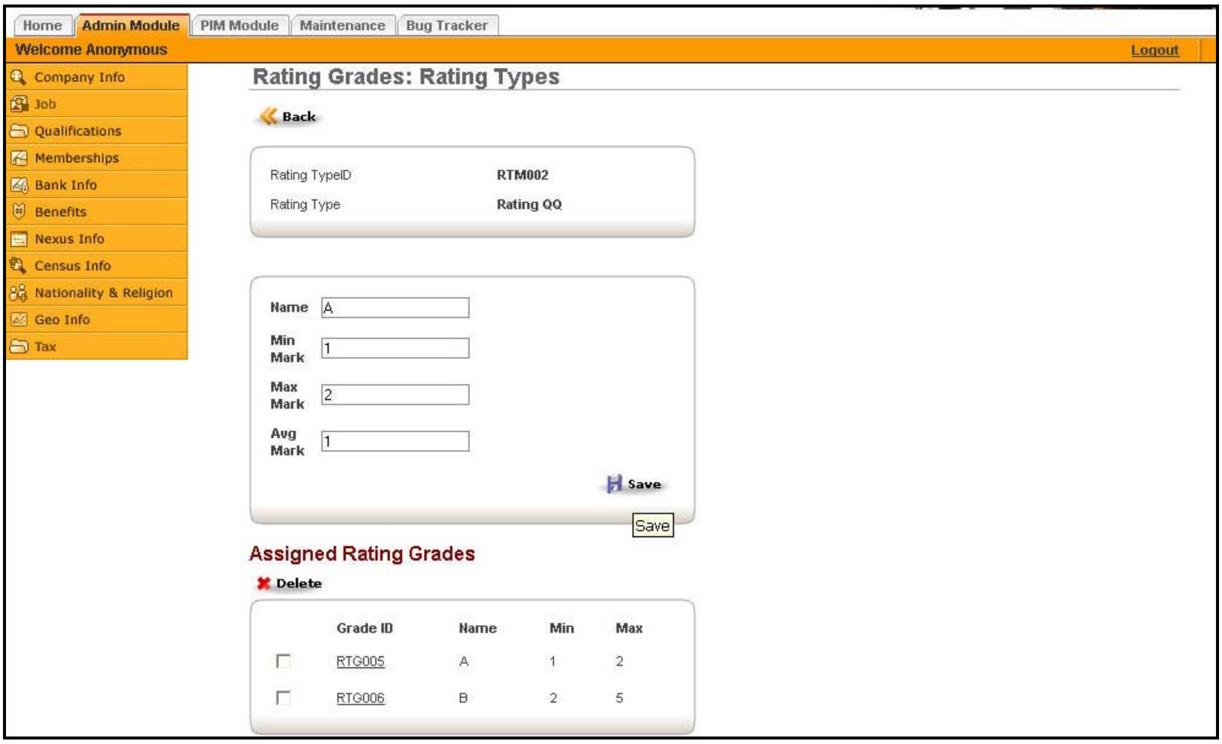

Figure 3.31

3.3.1.2 Assign Rating Grades

Assignment of Rating Grades could be done using two methods.

- Immediately after a new Rating Type is added, a Rating grade could be assigned.
- Or, alternatively, by clicking on the Rating Type ID and then clicking on **Add Rating Grades** link.

All Rating Grades assigned to a particular Rating Type would be displayed in the 'Assigned Rating Grades' section on same page. See figure 3.31 above.

1. Enter Grade Name
2. Enter Minimum mark for particular grade
3. Enter Maximum mark for particular grade
4. Enter Average mark for particular grade

Click **Save** button. If the save is successful, the new entry is displayed in the 'Assigned Rating Grades' section.

3.3.1.3 Edit Assigned Rating Grades

1. On the Rating Methods page, click on the Rating Type ID to be edited.
2. Then click **Add Rating Grades** link.
3. In the 'Assigned Rating Grades' section click on the Grade ID that is to be edited.
4. Click on **Edit** button, make the necessary changes and then click **Save** button.

3.3.1.4 Delete Assigned Rating Grade

1. On the Rating Methods page, click on the Rating Type ID of the assigned Rating Grade to be deleted.
2. Then click **Add Rating Grades** link.
3. In the 'Assigned Rating Grades' section click on the Grade ID that is to be deleted. Refer figure 3.31. Multiple Rating Grades assigned could be deleted simultaneously.

3.3.1.5 Edit Rating Type

Click on the Rating Type ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.3.1.6 Delete Rating Type

This would enable the user to delete a Rating Type. Click on the checkbox against the Rating Type ID to be deleted and click **Delete** button. Multiple Rating Types could be deleted simultaneously.

3.3.2 Qualification Types

The Qualification Types page is displayed in Figure 3.32. Types of qualifications achieved by employees can be defined in the System.

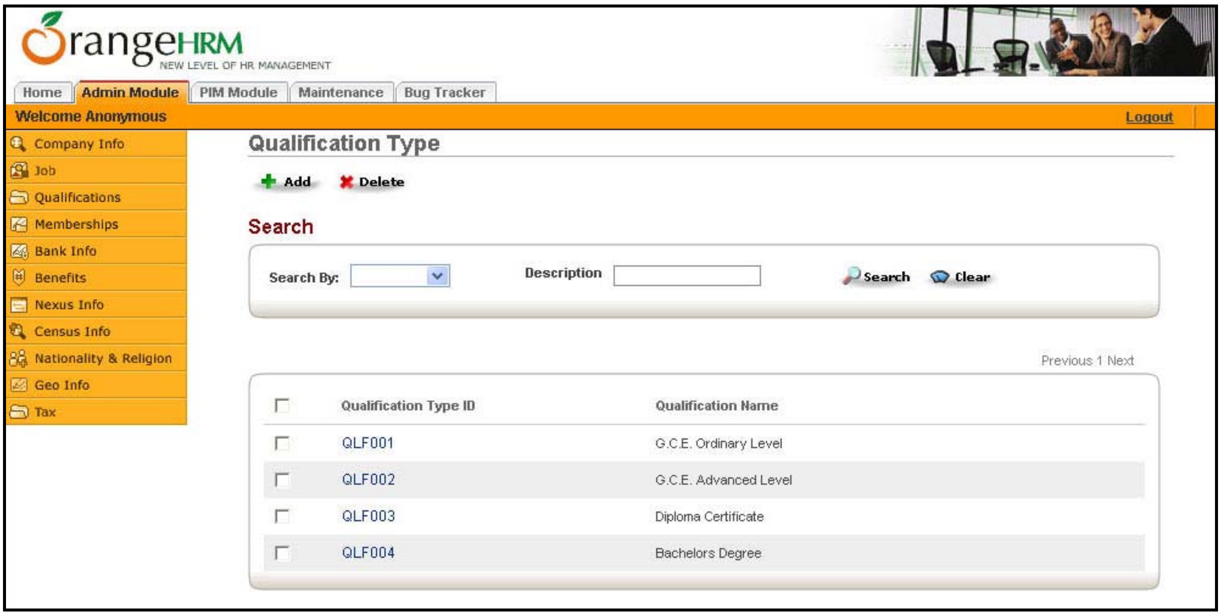

Figure 3.32

A search can be done on Qualification Type based on Qualification Type ID or Qualification Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Qualification Type. Click on the **Previous** link to move to the previous page of Qualification Type.

3.3.2.1 Add Qualification Type

This would enable the addition of a Qualification Type. Click on **Add** button in the Qualification Type page. The page used to add a Qualification Type is displayed in Figure 3.33.

1. Qualification Type ID is automatically generated.
2. Enter the Description (Qualification Type Name)

Click **Save button**. If the save is successful, the Qualification Type page is displayed with a 'Addition Successful' Notification.

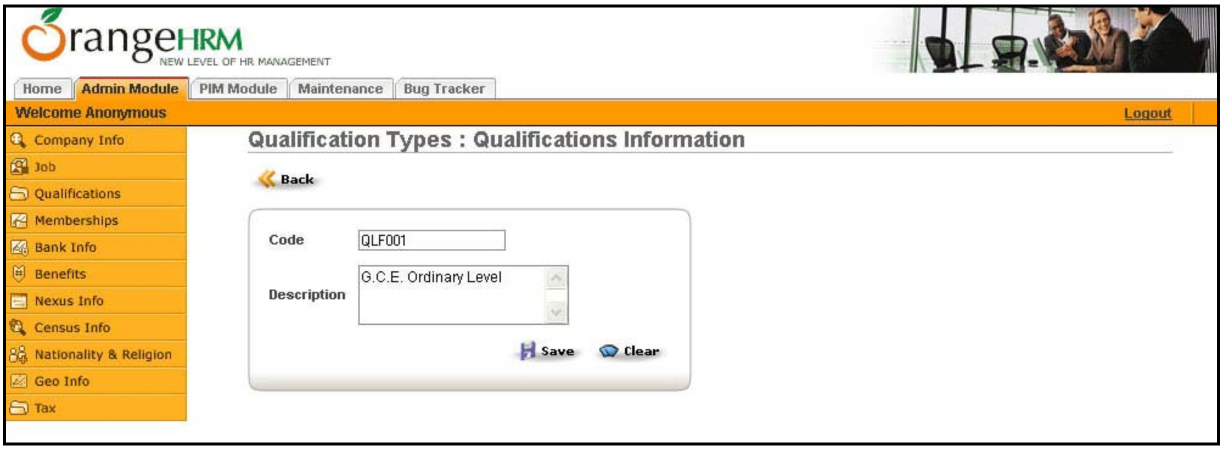

Figure 3.33

3.3.2.2 Edit Qualification Type

Click on the Qualification Type ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.3.2.3 Delete Qualification Type

This would enable the user to delete a Qualification Type. Click on the checkbox against the Qualification Type ID to be deleted and click **Delete** button. Multiple Qualification Types could be deleted simultaneously.

3.3.3 Qualifications

The Qualification page is displayed in Figure 3.34. Details of employee qualifications is maintained in the System.

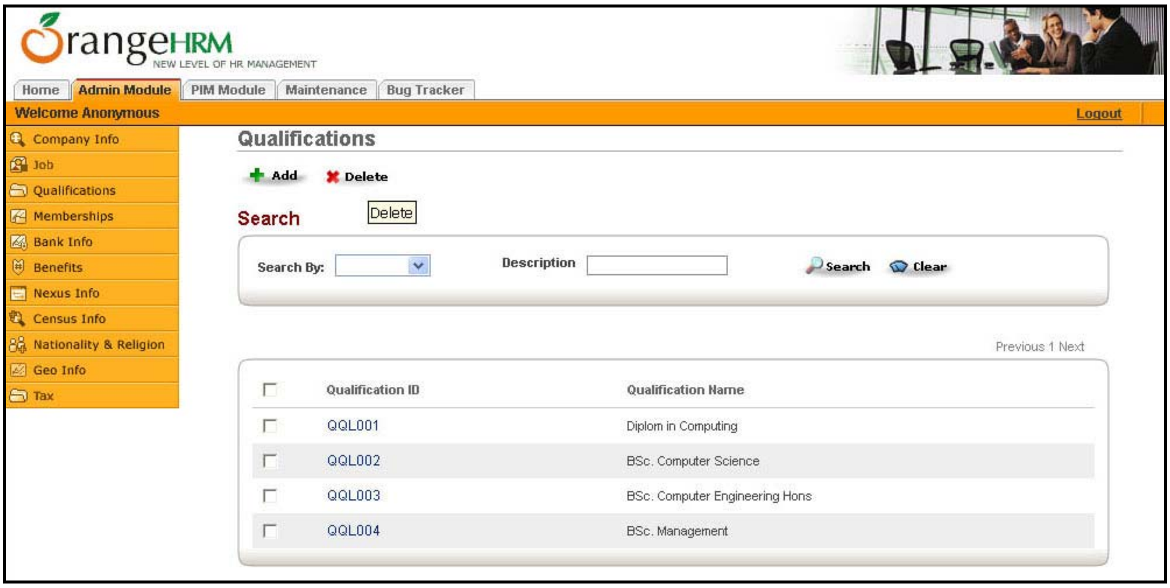

Figure 3.34

A search can be done on Qualifications based on Qualification ID or Qualification Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Qualifications. Click on the **Previous** link to move to the previous page of Qualifications.

3.3.3.1 Add Qualification

This would enable the addition of a Qualification. Click on **Add** button in the Qualification page. The page used to add a Qualification is displayed in Figure 3.35.

NOTE: It is important to have added the relevant Qualification Type before adding a Qualification. Refer Section 3.3.2.1 to add a Qualificaiton Type.

1. Qualification ID is automatically generated.
2. Select Qualification Type
3. Enter the Description (Qualification Name)
4. Select Rating

Click **Save button**. If the save is successful, the Qualification page is displayed with a 'Addition Successful' Notification.

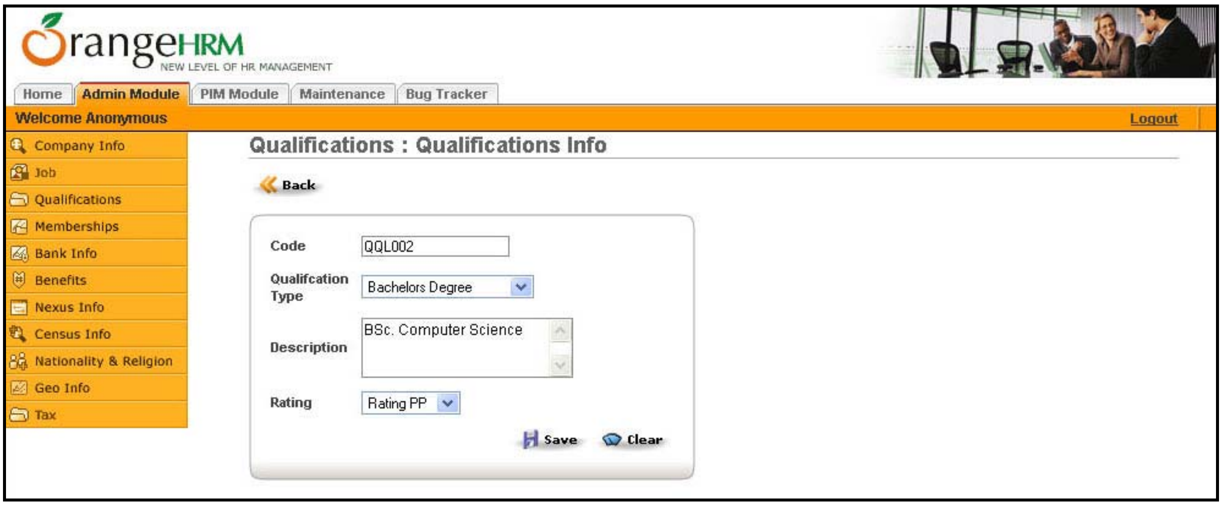

Figure 3.35

3.3.3.2 Edit Qualification

Click on the Qualification that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.3.3.3 Delete Qualification

This would enable the user to delete a Qualification. Click on the checkbox against the Qualification ID to be deleted and click **Delete** button. Multiple qualifications could be deleted simultaneously.

3.3.4 Subjects

The Subjects page is displayed in Figure 3.36. The subjects that are included in a qualification are specified in the System.

NOTE: The qualifications should have been entered to the system before adding subjects. Refer Section 3.3.3.1 to add a Qualificaiton.

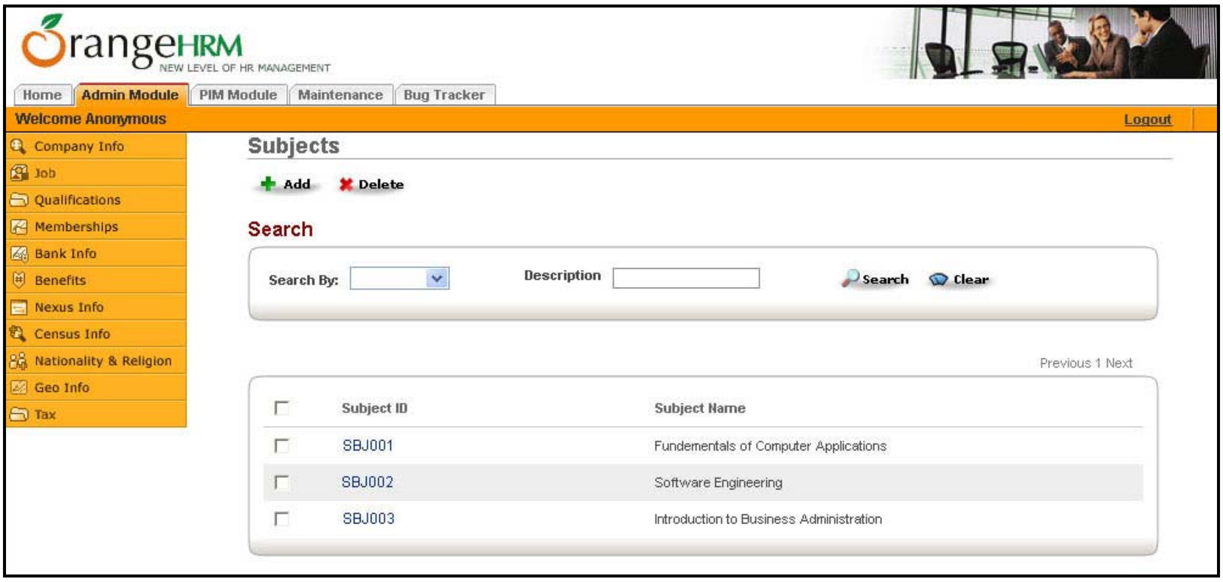

Figure 3.36

A search can be done on subjects based on Subject ID or Subject Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Subjects. Click on the **Previous** link to move to the previous page of Subjects.

3.3.4.1 Add Subject

This would allow the addition of a Subject. Click on **Add** button in the Subjects page. The page used to add a Subject is displayed in Figure 3.37.

1. Subject ID is automatically generated.
2. Enter the Description (Subject Name)
3. Select Qualification Info

Click **Save button**. If the save is successful, the Subjects page is displayed with a 'Addition Successful' Notification.

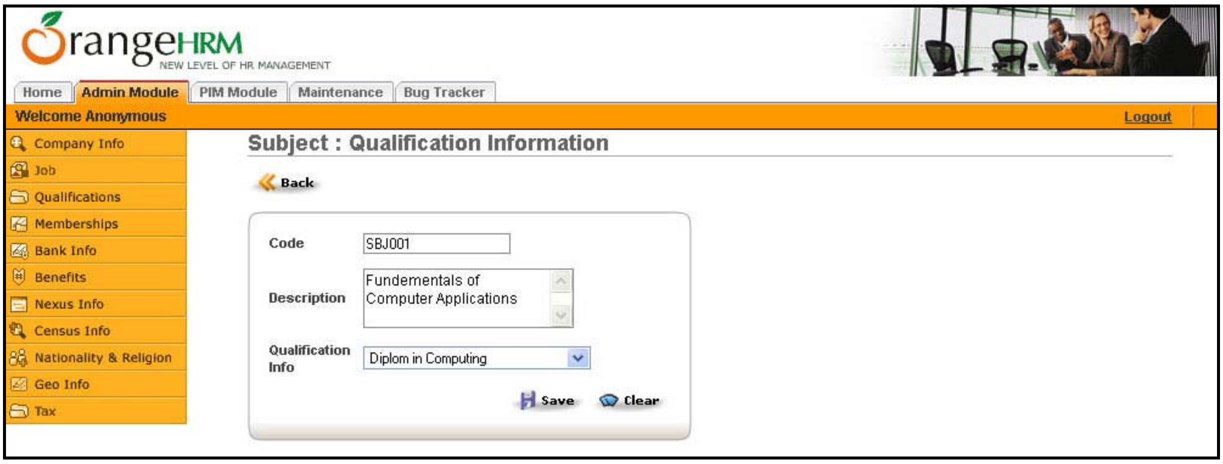

Figure 3.37

3.3.4.2 Edit Subject

Click on the Subject ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.3.4.3 Delete Subject

This would enable the user to delete a Subject. Click on the checkbox against the Subject ID to be deleted and click **Delete** button. Multiple Subjects could be deleted simultaneously.

3.3.5 Skills

The Skills page is displayed in Figure 3.38 and it is used to specify various skills that employees would possess.

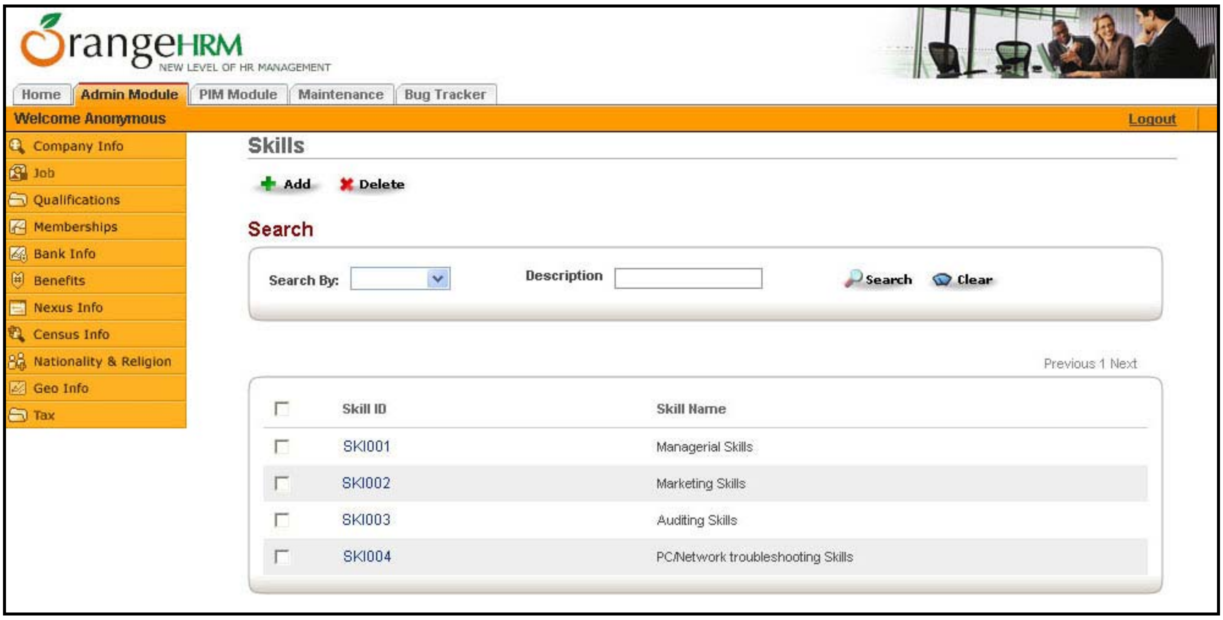

Figure 3.38

A search can be done on Skills based on Skills ID or Skills Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Skills. Click on the **Previous** link to move to the previous page of Skills.

3.3.5.1 Add Skill

This would enable the addition of a Skill. Click on **Add** button in the Skills page. The page used to add a Skill is displayed in Figure 3.39.

1. Skill ID is automatically generated.
2. Enter the Description (Skill Name)

Click **Save button**. If the save is successful, the Skill page is displayed with a 'Addition Successful' Notification.

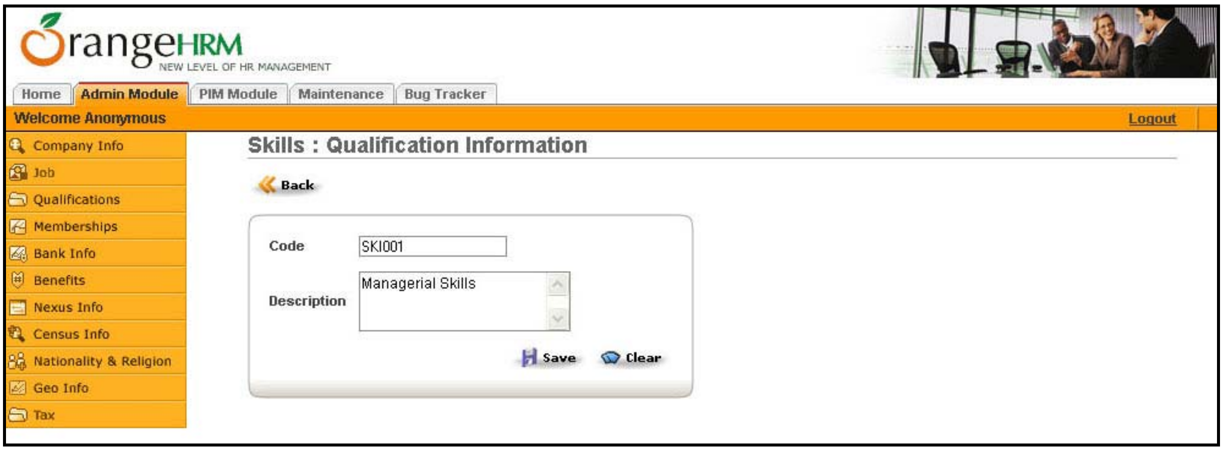

Figure 3.39

3.3.5.2 Edit Skill

Click on the Skill ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.3.5.3 Delete Skill

This would enable the user to delete a Skill. Click on the checkbox against the Skill ID to be deleted and click **Delete** button. Multiple Skills could be deleted simultaneously.

3.3.6 Languages

The Languages page is displayed in Figure 3.40. This is used to define the language skills.

NOTE: It is imporant to have added the relevant rating method before adding a language. Refer Section 3.3.1.1 to add Rating methods.

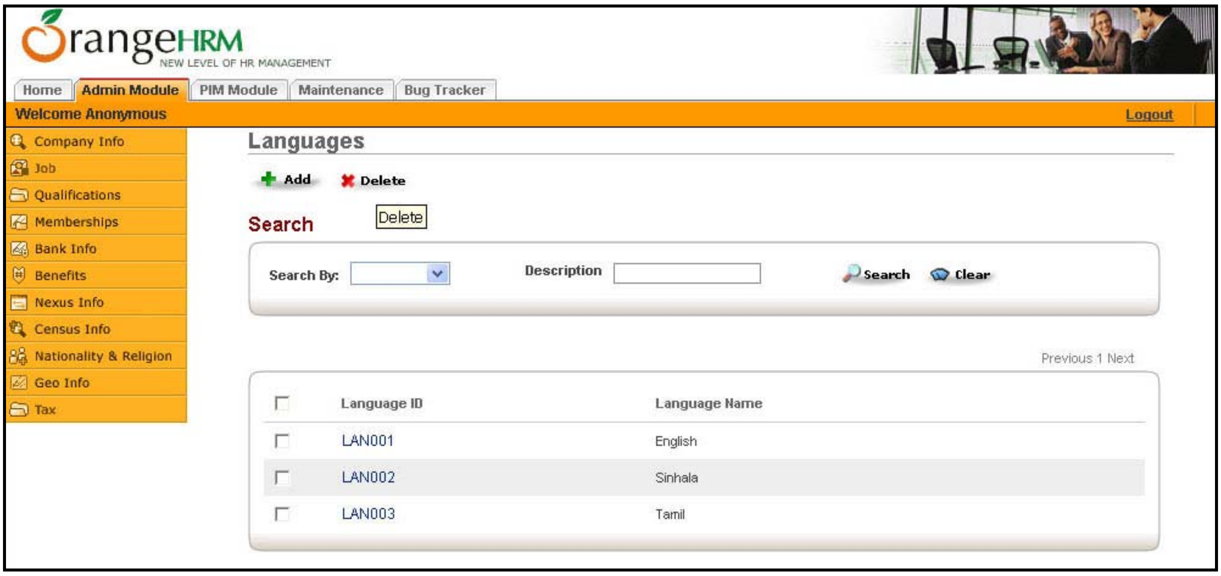

Figure 3.40

A search can be done on Languages based on Languages ID or Languages Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Languages. Click on the **Previous** link to move to the previous page of Languages.

3.3.6.1 Add Language

This would enable the addition of a Language. Click on **Add** button in the Language Information page. The page used to add a Language is displayed in Figure 3.41.

1. Language ID is automatically generated.
2. Enter the Description (Language Name)
3. Select Rating Method

Click **Save button**. If the save is successful, the Language Information page is displayed with a 'Addition Successful' Notification.

Figure 3.41

3.3.6.2 Edit Language

Click on the Language ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.3.6.3 Delete Language

This would enable the user to delete a Language. Click on the checkbox against the Language ID to be deleted and click **Delete** button. Multiple Languages could be deleted simultaneously.

3.3.7 Sub Skills

The Sub Skills page is displayed in Figure 3.42. This is used to maintain information regarding Sub Skills.

NOTE: It is important to have added the relevant Skill before adding a Sub Skill. Refer Section 3.3.5.1 to add Skill.

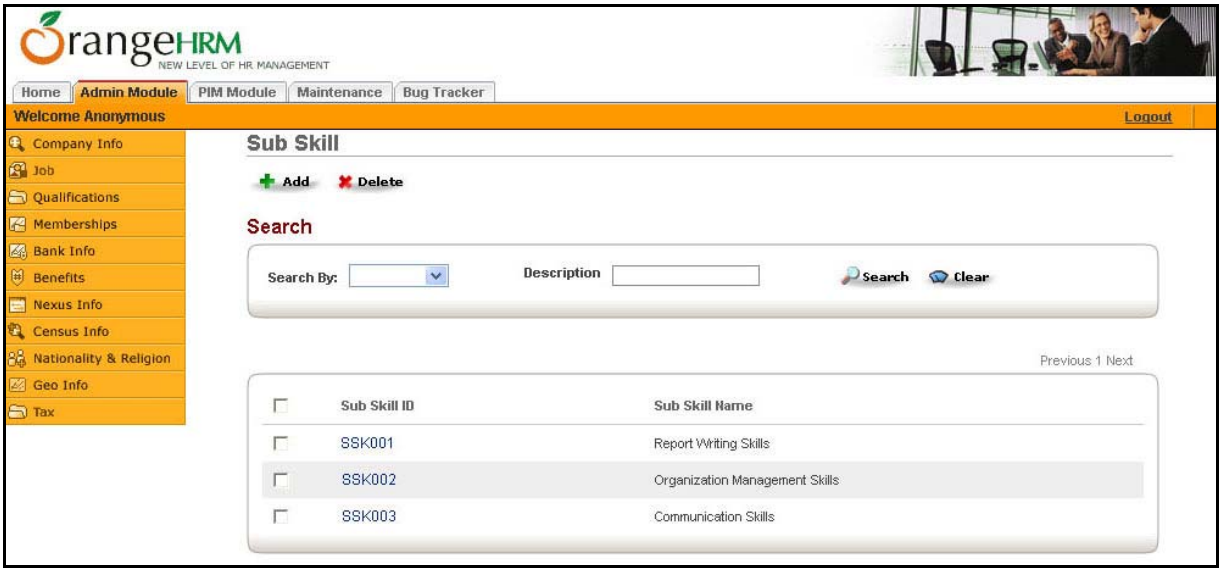

Figure 3.42

A search can be done on Sub Skills based on Sub Skill ID or Sub Skill Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Sub Skills. Click on the **Previous** link to move to the previous page of Sub Skills.

3.3.7.1 Add Sub Skills

This would enable the addition of a Sub Skill. Click on **Add** button in the Sub Skills page. The page used to add a Sub Skill is displayed in Figure 3.43.

1. Sub Skill ID is automatically generated.
2. Enter the Sub Skill Name
3. Enter Sub Skill Description
4. Select Skill Type

Click **Save button**. If the save is successful, the Sub Skills page is displayed with a 'Addition Successful' Notification.

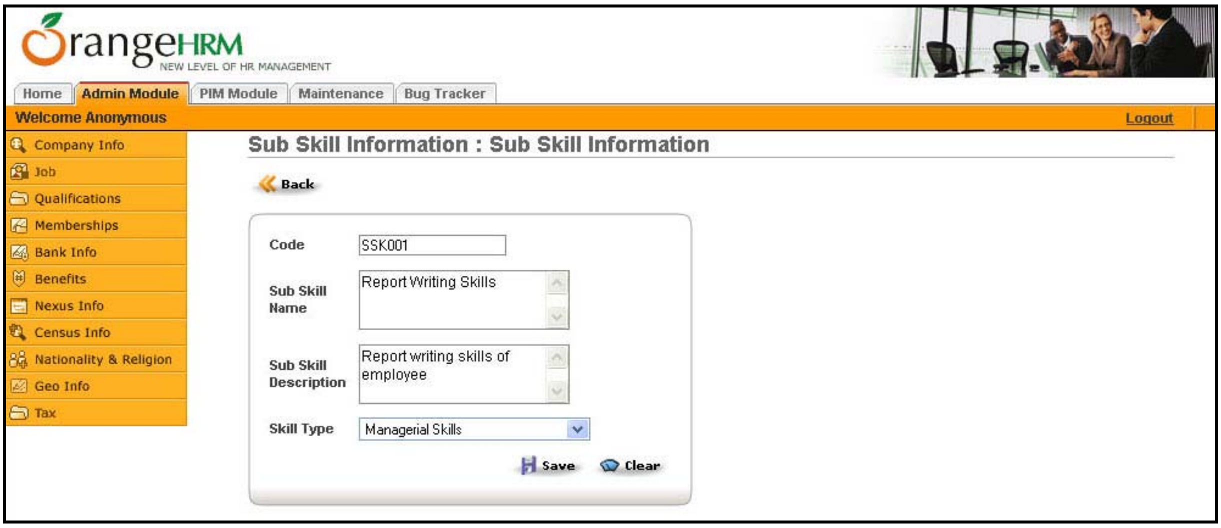

Figure 3.43

3.3.7.2 Edit Sub Skill

Click on the Sub Skill ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.3.7.3 Delete Sub Skill

This would enable the user to delete a Sub Skill. Click on the checkbox against the Sub Skill ID to be deleted and click **Delete** button. Multiple Sub Skills could be deleted simultaneously.

3.3.8 Extra Curricular Activity Category

The Extra Curricular Activity Type page is displayed in Figure 3.44. This is used to specify the various categories of Extra Curricular Activities.

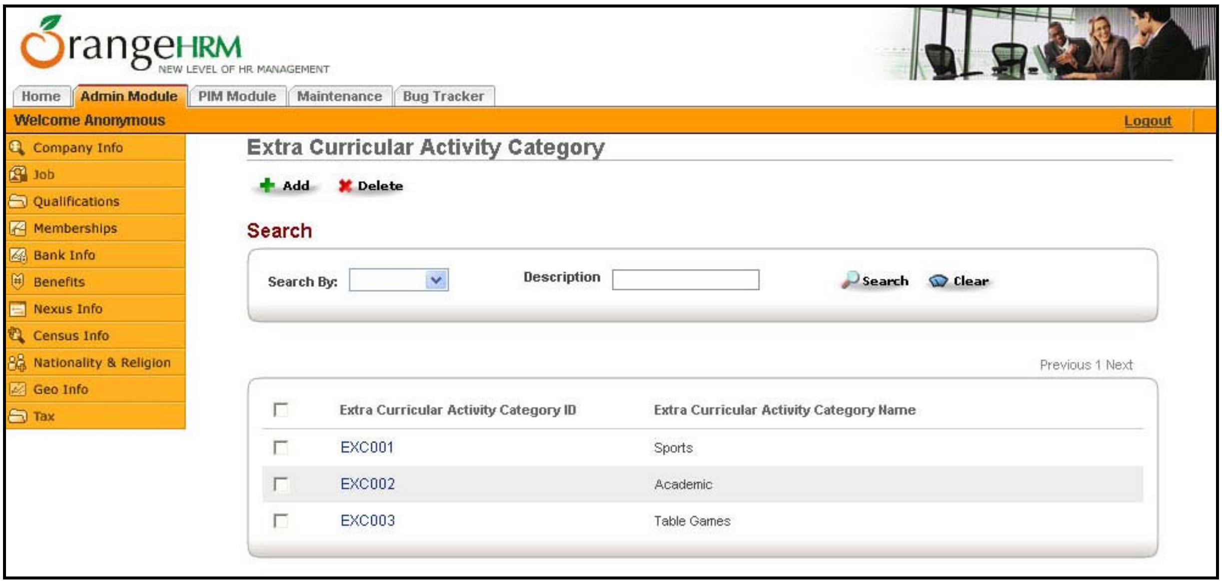

Figure 3.44

A search can be done on Extra Curricular Activity Category based on Extra Curricular Activity Category ID or Extra Curricular Activity Category Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Extra Curricular Activity Category. Click on the **Previous** link to move to the previous page of Extra Curricular Activity Category.

3.3.8.1 Add Extra Curricular Activity Category

This would enable the addition of a Extra Curricular Activity Category. Click on **Add** button in the Extra Curricular Activity Category page. The page used to add an Extra Curricular Activity Category is displayed in Figure 3.45.

1. Extra Curricular Activity Category ID is automatically generated.
2. Enter the Extra Curricular Activity Category Name

Click **Save button**. If the save is successful, the Extra Curricular Activity Category page is displayed with a 'Addition Successful' Notification.

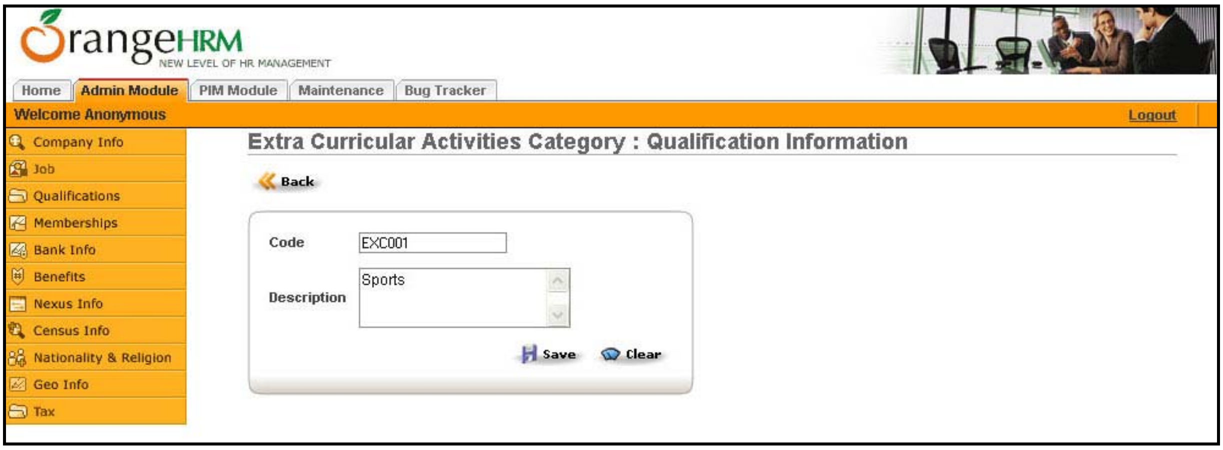

Figure 3.45

3.3.8.2 Edit Extra Curricular Activity

Click on the Extra Curricular Activity Category ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button

3.3.8.3 Delete Extra Curricular Activity Category

This would enable the user to delete a Extra Curricular Activity Category. Click on the checkbox against the Extra Curricular Activity Category ID to be deleted and click **Delete** button. Multiple Extra Curricular Activity Categories could be deleted simultaneously.

3.3.9 Extra Curricular Activity Type

The Extra Curricular Activity page is displayed in Figure 3.46. This is used to specify the various extra curricular activities.

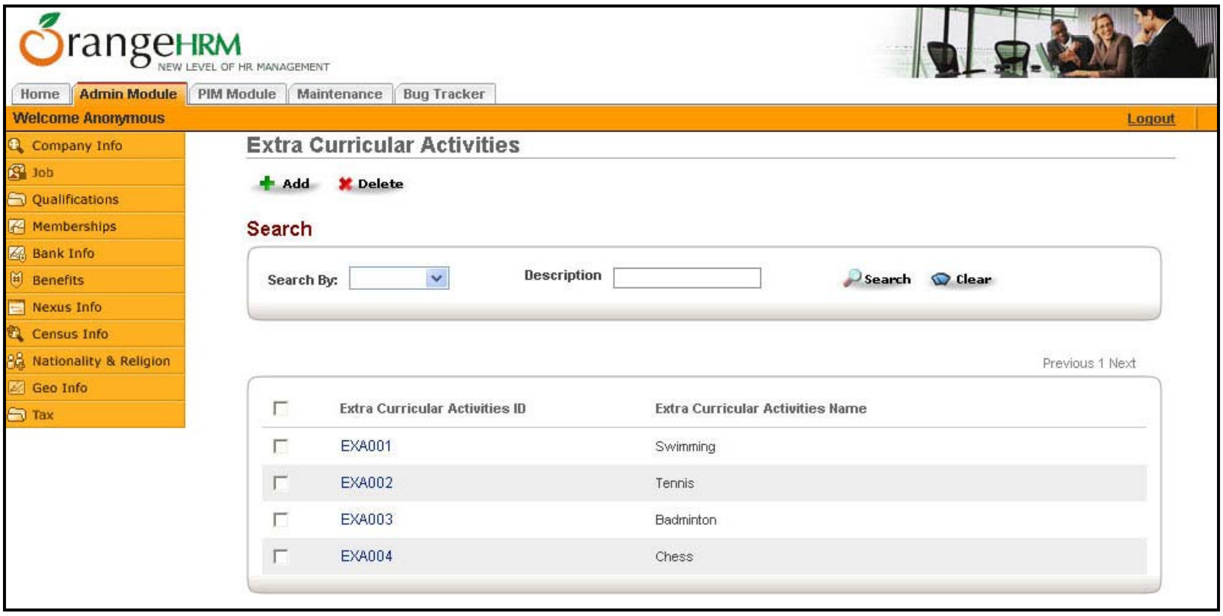

Figure 3.46

A search can be done on Extra Curricular Activities based on Extra Curricular Activities ID or Extra Curricular Activity Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Extra Curricular Activities. Click on the **Previous** link to move to the previous page of Extra Curricular Activities.

3.3.9.1 Add Extra Curricular Activity

This would enable the addition of a Extra Curricular Activity Category. Click on **Add** button in the Extra Curricular Activity Category page. The page used to add an Extra Curricular Activity is displayed in Figure 3.47.

1. Extra Curricular Activity ID is automatically generated.
2. Enter the Extra Curricular Activity Name
3. Select Extra Curricular Activity Category

Click **Save button**. If the save is successful, the Extra Curricular Activity page is displayed with a 'Addition Successful' Notification.

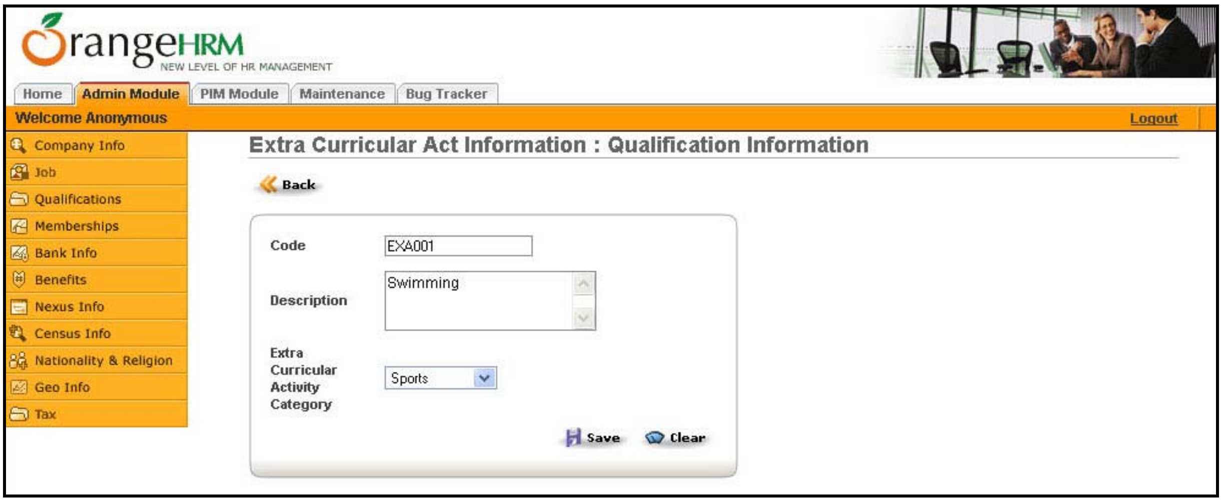

Figure 3.47

3.3.9.2 Edit Extra Curricular Activity

Click on the Extra Curricular Activity ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button

3.3.9.3 Delete Extra Curricular Activity Category

This would enable the user to delete a Extra Curricular Activity. Click on the checkbox against the Extra Curricular Activity ID to be deleted and click **Delete** button. Multiple Extra Curricular Activities could be deleted simultaneously.

3.4 Memberships

All information related to memberships could be handled by selecting Memberships from the menu. The sub menu consists of the following commands.

- Memberships Types
- Memberships

3.4.1 Membership Types

The Membership Types page is displayed in Figure 3.48. Types of memberships held by employees are defined in the System.

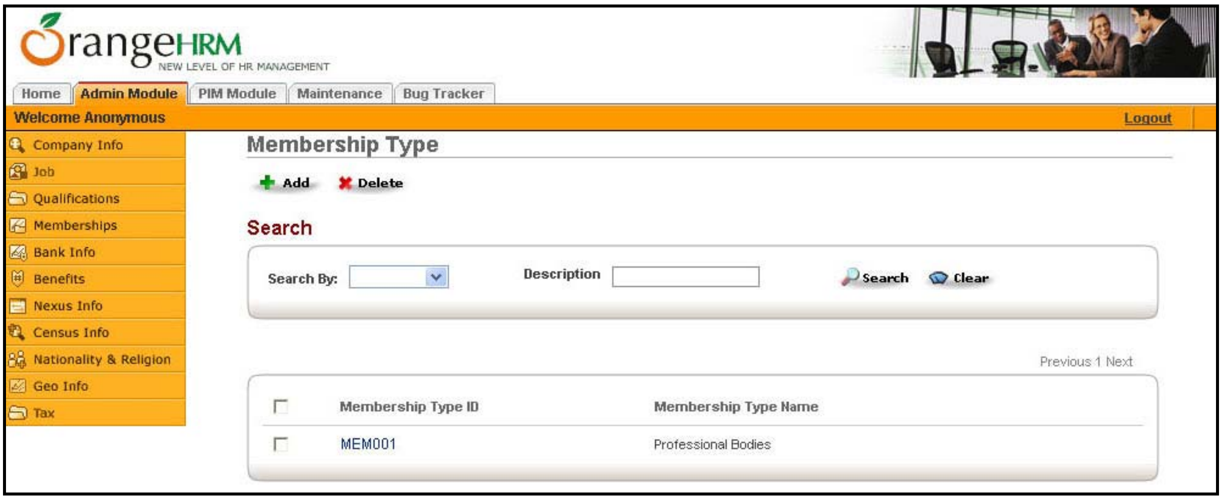

Figure 3.48

A search can be done on Membership Type based on Membership Type ID or Membership Type Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Membership Type. Click on the **Previous** link to move to the previous page of Membership Type.

3.4.1.1 Add Membership Type

This would enable the addition of a Membership Type. Click on **Add** button in the Membership Type page. The page used to add a Membership Type is displayed in Figure 3.49.

1. Membership Type ID is automatically generated.
2. Enter the Description (Membership Type Name)

Click **Save button.** If the save is successful, the Membership Types page is displayed with a 'Addition Successful' Notification.

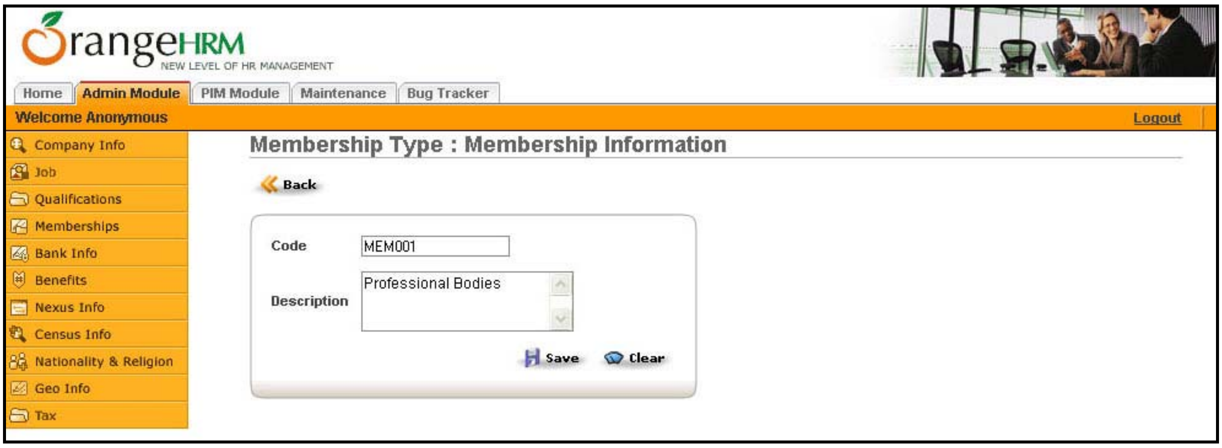

Figure 3.49

3.4.1.2 Edit Membership Type

Click on the Membership Type ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.4.1.3 Delete Membership Type

This would enable the user to delete a Membership Type. Click on the checkbox against the Membership Type ID to be deleted and click **Delete** button. Multiple Membership Types could be deleted simultaneously.

3.4.2 Memberships

The Memberships page is displayed in Figure 3.50. Details of memberships held by employees are maintained in the System.

NOTE: It is important to have defined the relevant type of membership before adding a membership. Refer Section 3.4.1.1 to add a membership type.

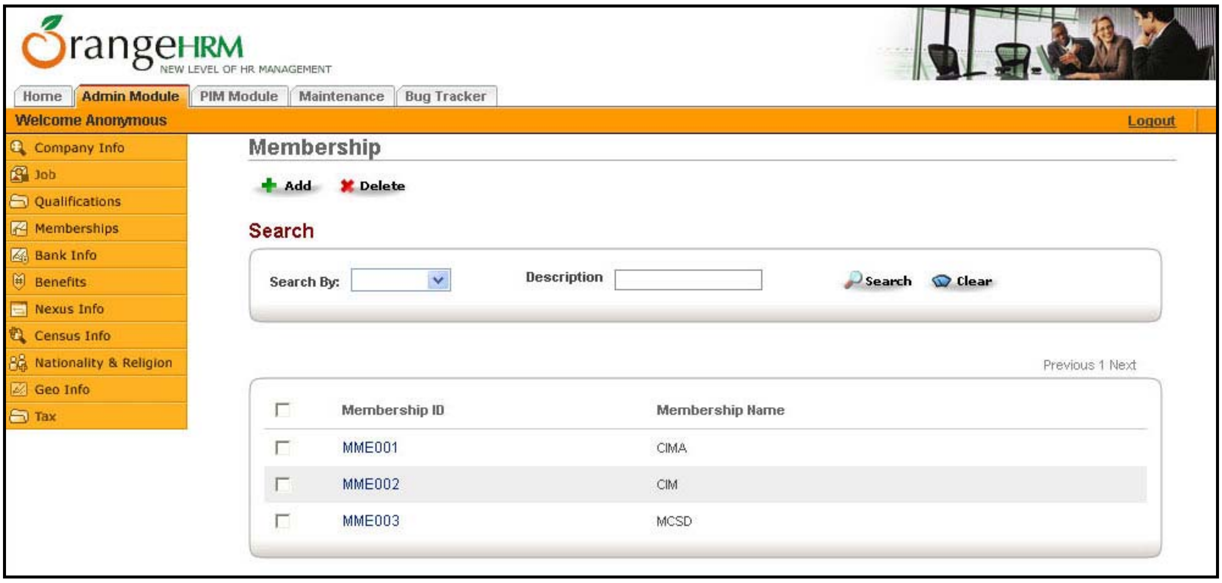

Figure 3.50

A search can be done on Memberships based on Membership ID and Membership Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Membership. Click on the **Previous** link to move to the previous page of Membership.

3.4.2.1 Add Membership

This would enable the addition of a Membership. Click on **Add** button in the Membership page. The page used to add a Membership is displayed in Figure 3.51

1. Membership ID is automatically generated.
2. Enter the Description (Membership Name)
3. Select Membership Type

Click **Save button**. If the save is successful, the Membership page is displayed with a 'Addition Successful' Notification.

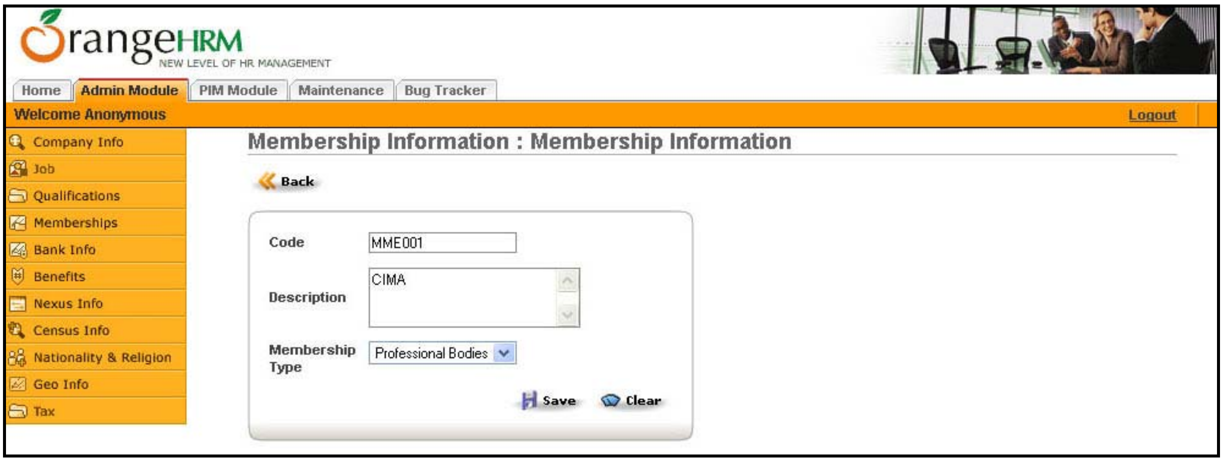

Figure 3.51

3.4.2.2 Edit Membership

Click on the Membership ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.4.2.3 Delete Membership

This would enable the user to delete a Membership. Click on the checkbox against the Membership ID to be deleted and click **Delete** button. Multiple Memberships could be deleted simultaneously.

3.5 Bank Info

All information related to banks can be handled by selecting Bank Info from the menu. The sub menu consists of the following commands.

- Banks
- Branches

3.5.1 Banks

The Bank Information page is displayed in Figure 3.52. Bank related information is maintained in the System.

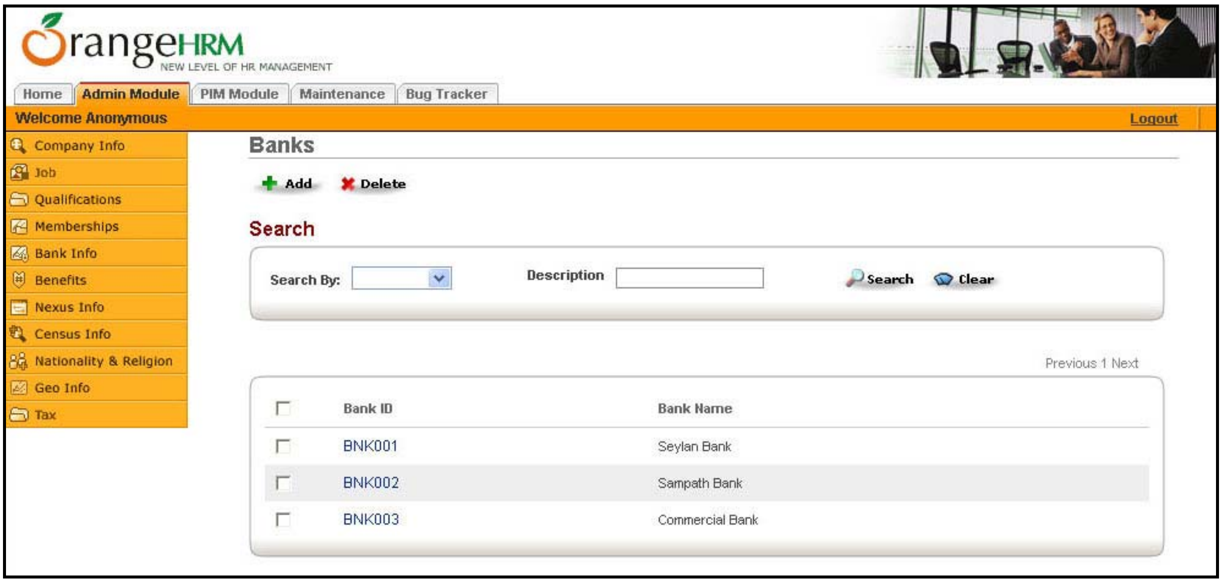

Figure 3.52

A search can be done on Banks based on Bank ID or Bank Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Banks. Click on the **Previous** link to move to the previous page of Banks.

3.5.1.1 Add Bank

This would enable the addition of a Bank. Click on **Add** button in the Bank Information page. The page used to add Bank Information is displayed in Figure 3.53.

1. Bank ID is automatically generated.
2. Enter the Description (Bank Name)
3. Enter Address of the Bank
4. Enter Bank auto CLR House Code

Click **Save button**. If the save is successful, the Bank Information page is displayed with a 'Addition Successful' Notification.

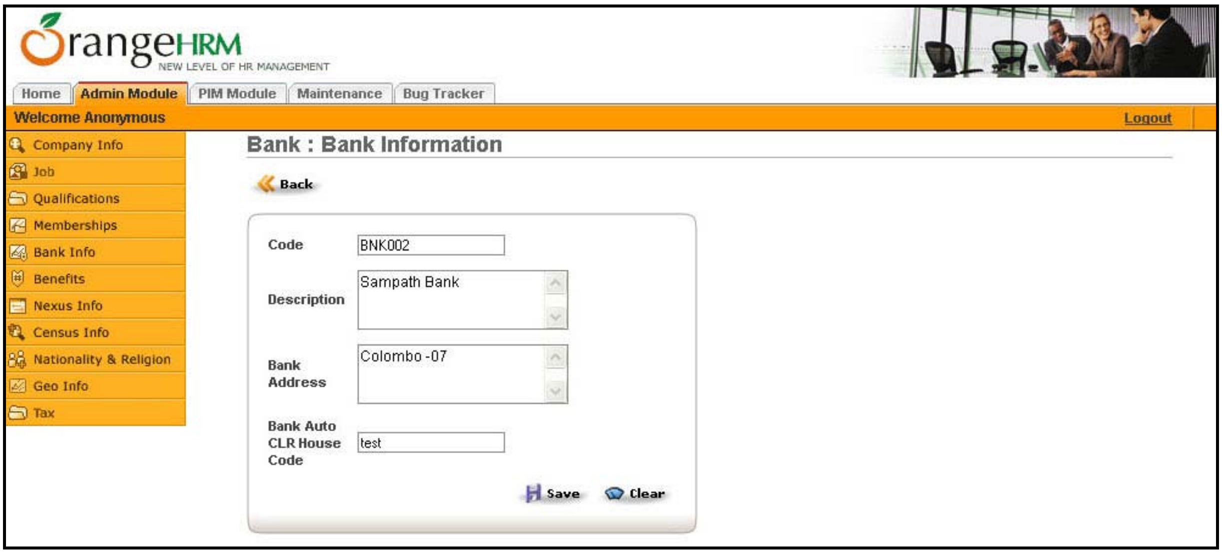

Figure 3.53

3.5.1.2 Edit Bank

Click on the Bank ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.5.1.3 Delete Bank

This would enable the user to delete a Bank. Click on the checkbox against the Bank ID to be deleted and click **Delete** button. Multiple Banks could be deleted simultaneously.

3.5.2 Branches

The Branches page is displayed in Figure 3.54 Information related to branches of banks is maintained in the System.

NOTE: It is important to have added the details of the relevant Bank to the system before adding details of a branch of that bank. Refer Section 3.5.1.1 to add a Bank.

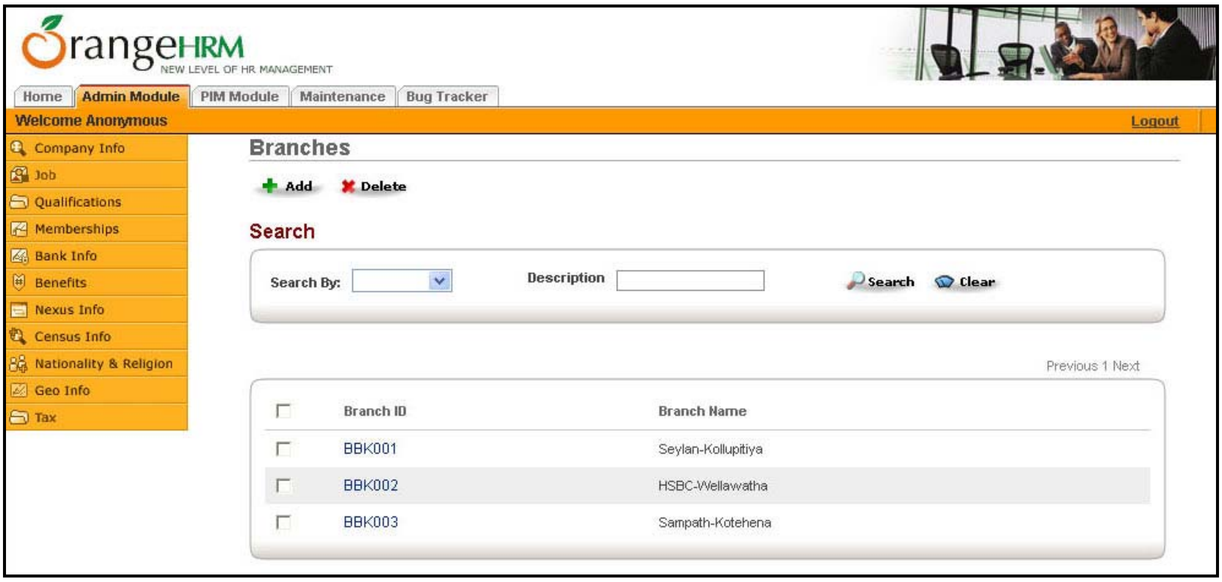

Figure 3.54

A search can be done on Branches based on Branch ID or Branch Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Branches. Click on the **Previous** link to move to the previous page of Branches.

3.5.2.1 Add Branch

This would enable the addition of a Branch. Click on **Add** button in the Branch page. The page used to add Branch Information is displayed in Figure 3.55.

1. Branch ID is automatically generated.
2. Select Bank to which the Branch belongs to
3. Enter the Description (Branch Name)
4. Enter Address of the Bank
5. Click on the checkbox of Slip Transfer if required
6. Enter Clear House Code

Click **Save button**. If the save is successful, the Branch page is displayed with a 'Addition Successful' Notification.

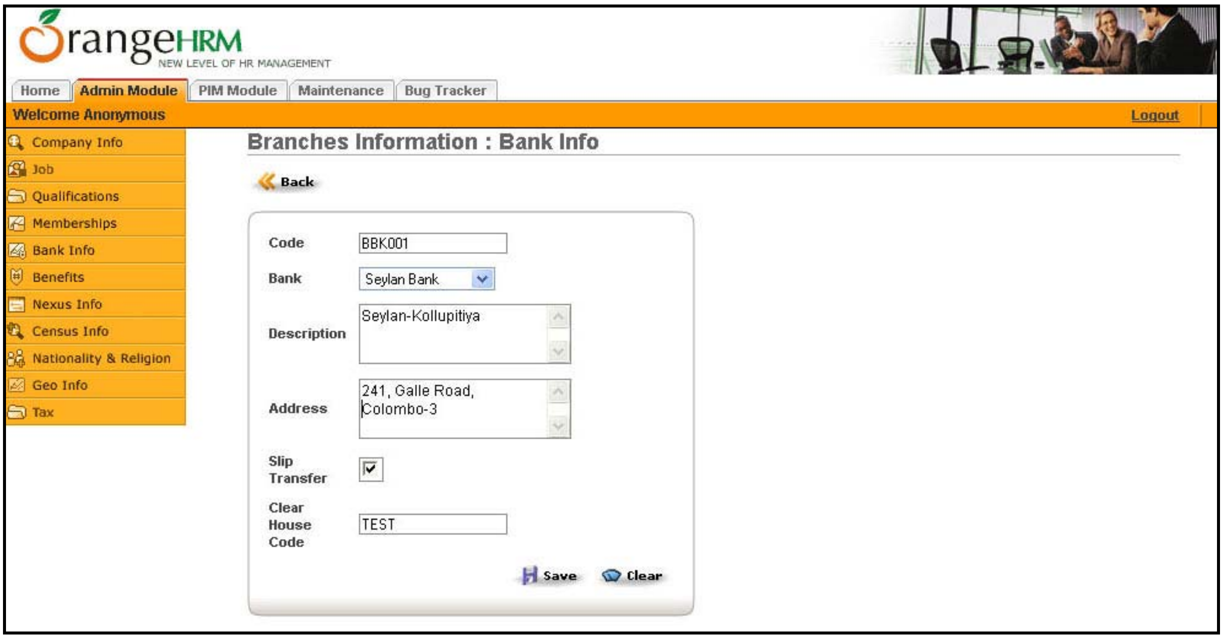

Figure 3.55

3.5.2.2 Edit Branch

Click on the Branch ID of the relative Branch Name that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.5.2.3 Delete Branch

This would enable the user to delete a Branch. Click on the checkbox against the Branch ID to be deleted and click **Delete** button. Multiple Branches could be deleted simultaneously.

3.6 Benefits

All information related to Benefits can be handled by selecting Benefits from the menu. The sub menu consists of the following commands.

- Cash Benefits
- Non-Cash Benefits
- Uniform Types
- Cash Benefits Assigned to Salary Grade
- Non- Cash Benefits Assigned to Salary Grade

3.6.1 Cash Benefits

The Cash Benefits page is displayed in figure 3.56. Cash benefits that can be assigned to employees are specified in the System.

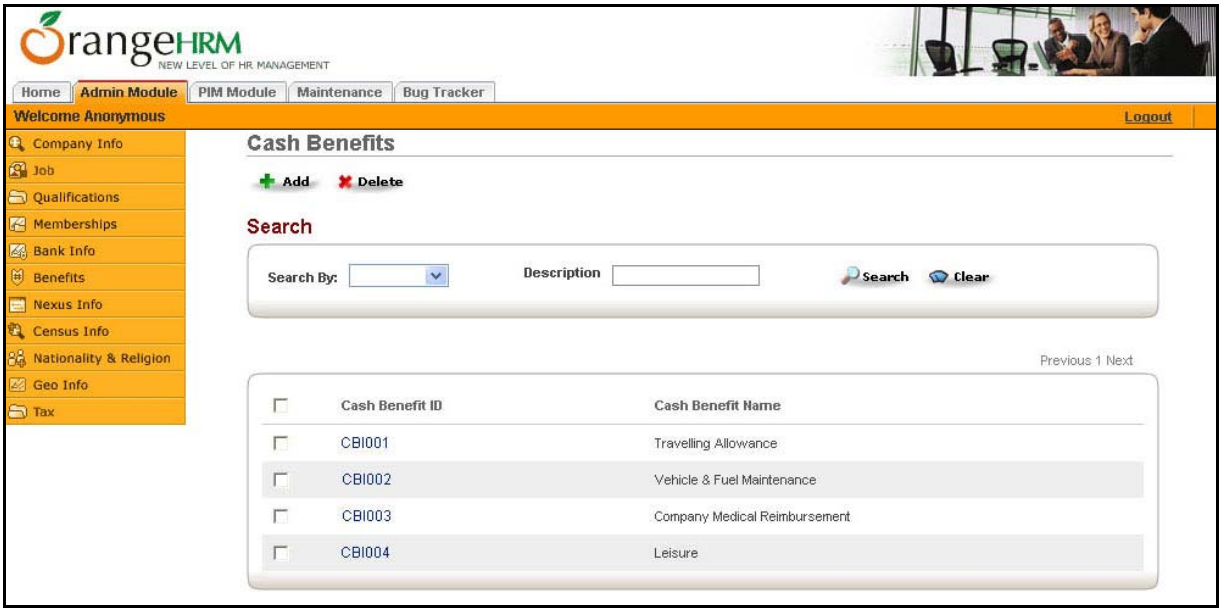

Figure 3.56

A search can be done on Cash Benefits based on Cash Benefit ID or Cash Benefit Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Cash Benefit. Click on the **Previous** link to move to the previous page of Cash Benefit.

3.6.1.1 Add Cash Benefit

This would enable the addition of a Cash Benefit. Click on **Add** button in the Cash Benefit page. The page used to add a Cash Benefit is displayed in Figure 3.57.

1. Cash Benefit ID is automatically generated.
2. Enter the Description (Cash Benefit Name)
3. Enter Benefit Amount

Click **Save button**. If the save is successful, the Cash Benefit page is displayed with a 'Addition Successful' Notification.

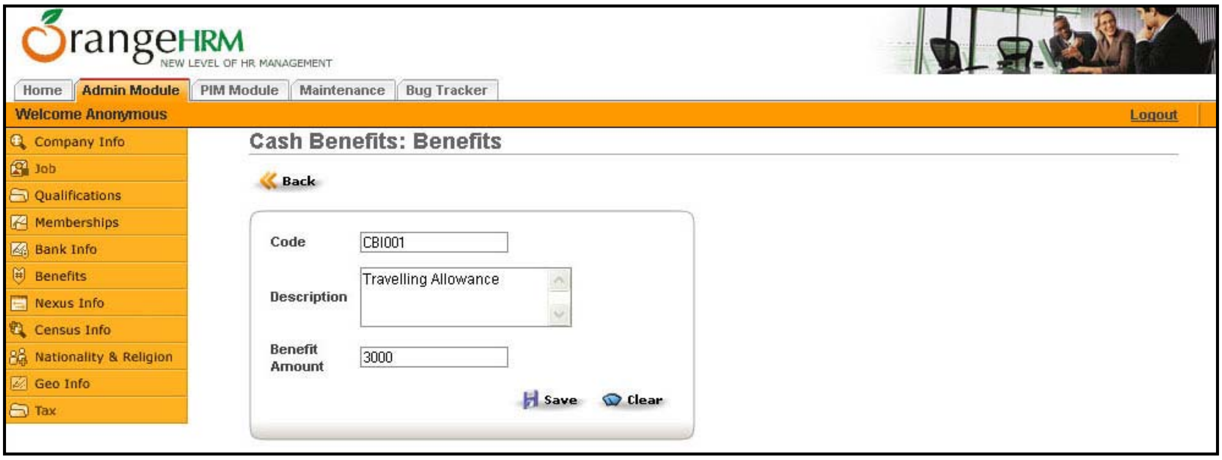

Figure 3.57

3.6.1.2 Edit Cash Benefit

Click on the Cash Benefit ID of the relative Cash Benefit Name that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.6.1.3 Delete Cash Benefit

This would enable the user to delete a Cash Benefit. Click on the checkbox against the Cash Benefit ID to be deleted and click **Delete** button. Multiple Cash Benefits could be deleted simultaneously.

3.6.2 Non-Cash Benefits

The Non-Cash Benefits page is displayed in Figure 3.58. Non-Cash benefits that can be assigned to employees are specified in the System.

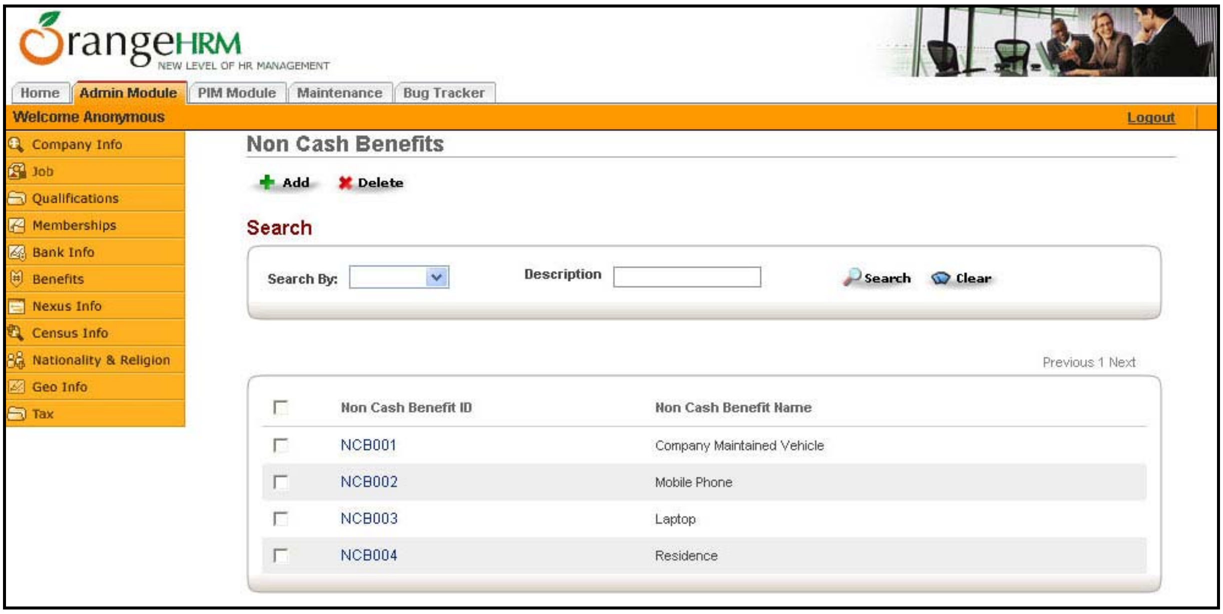

Figure 3.58

A search can be done on Non-Cash Benefits based on Non-Cash Benefit ID or Cash Benefit Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Non-Cash Benefit. Click on the **Previous** link to move to the previous page of Non-Cash Benefit.

3.6.2.1 Add Non-Cash Benefit

This would enable the addition of a Non-Cash Benefit. Click on **Add** button in the Non-Cash Benefit page. The page used to add a Non-Cash Benefit is displayed in Figure 3.59.

1. Non-Cash Benefit ID is automatically generated.
2. Enter the Description (Non-Cash Benefit Name)
3. Click on the checkbox Benefit Items Returnable if required

Click **Save button**. If the save is successful, the Non-Cash Benefit page is displayed with a 'Addition Successful' Notification.

Figure 3.59

3.6.2.2 Edit Non-Cash Benefit

Click on the Non-Cash Benefit ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.6.2.3 Delete Non-Cash Benefit

This would enable the user to delete a Non-Cash Benefit. Click on the checkbox against the Non-Cash Benefit ID to be deleted and click **Delete** button. Multiple Non-Cash Benefits could be deleted simultaneously.

3.6.3 Uniform Types

The Uniform Type page is displayed in Figure 3.60. Uniform Types indicate the various uniforms that employees are expected to dressed in.

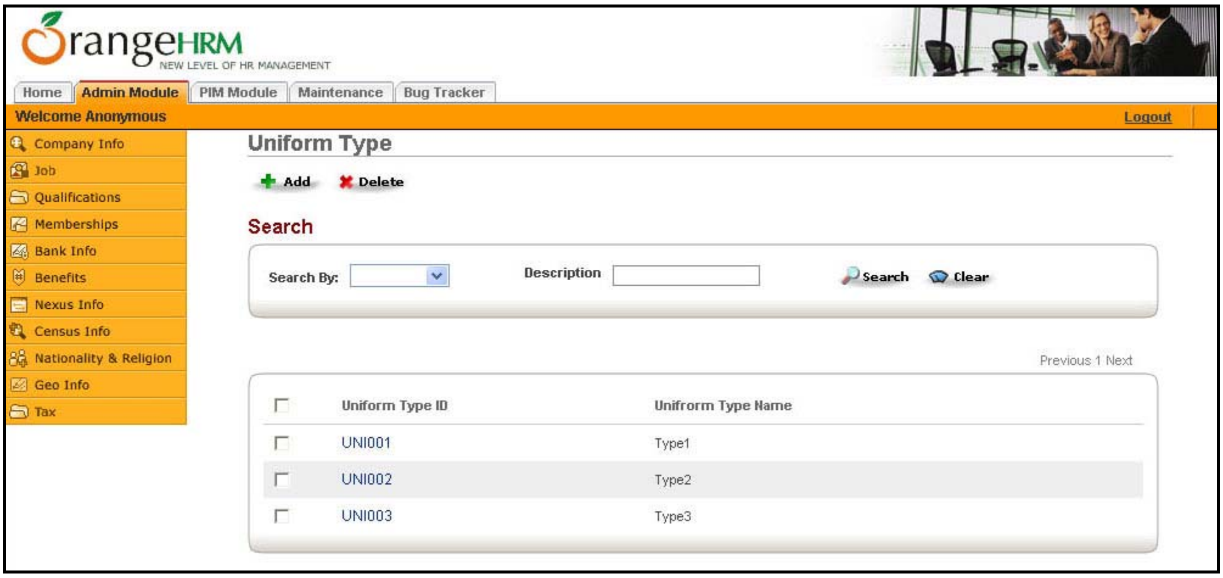

Figure 3.60

A search can be done on Uniform Type based on Uniform Type ID or Uniform Type Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Uniform Type. Click on the **Previous** link to move to the previous page of Uniform Type.

3.6.3.1 Add Uniform Type

This would enable the addition of a Uniform Type. Click on **Add** button in the Uniform Type page. The page used to add a Uniform Type is displayed in Figure 3.61.

1. Uniform Type ID is automatically generated.
2. Enter the Description (Uniform Type Name)

Click **Save button**. If the save is successful, the Uniform Type page is displayed with a 'Addition Successful' Notification.

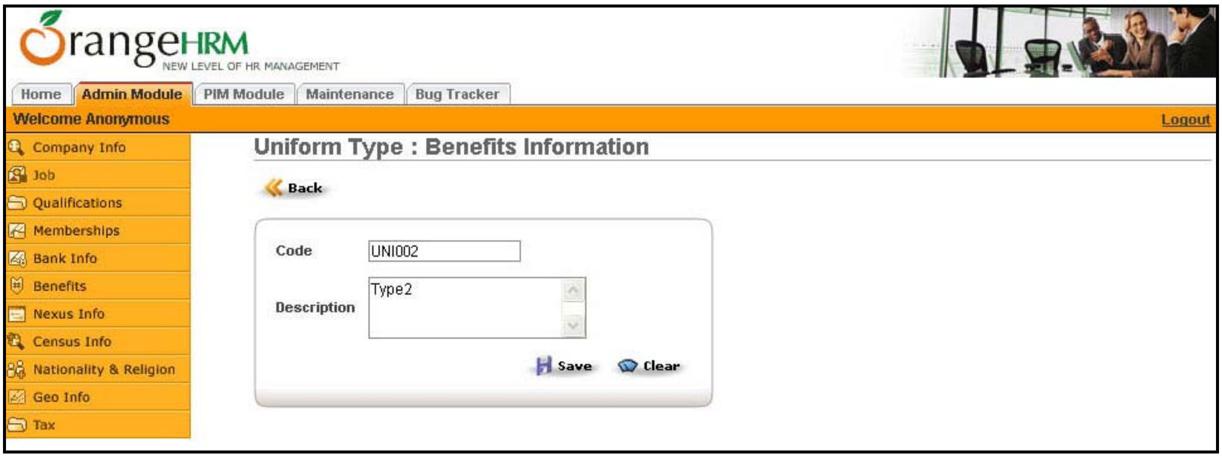

Figure 3.61

3.6.3.2 Edit Uniform Type

Click on the Uniform Type ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.6.3.3 Delete Uniform Type

This would enable the user to delete a Uniform Type. Click on the checkbox against the Uniform Type ID to be deleted and click **Delete** button. Multiple Uniform Types could be deleted simultaneously.

3.6.4 Cash Benefits Assigned to Salary Grade

The Cash Benefits Assigned to Salary Grade page is displayed in Figure 3.62. Cash Benefits are assigned to Salary Grades in this section. Only the Salary Grades which have been assigned with a minimum one Cash Benefit would be displayed on this page.

NOTE: This requires the Salary Grade be already entered to the system. Refer Section 3.2.2.1 to add a Salary Grade. The Cash Benefits to assigned should also be entered to the system before assigning Cash Benefits to Salary Grades. Refer section 3.6.1.1 on adding a Cash Benefit.

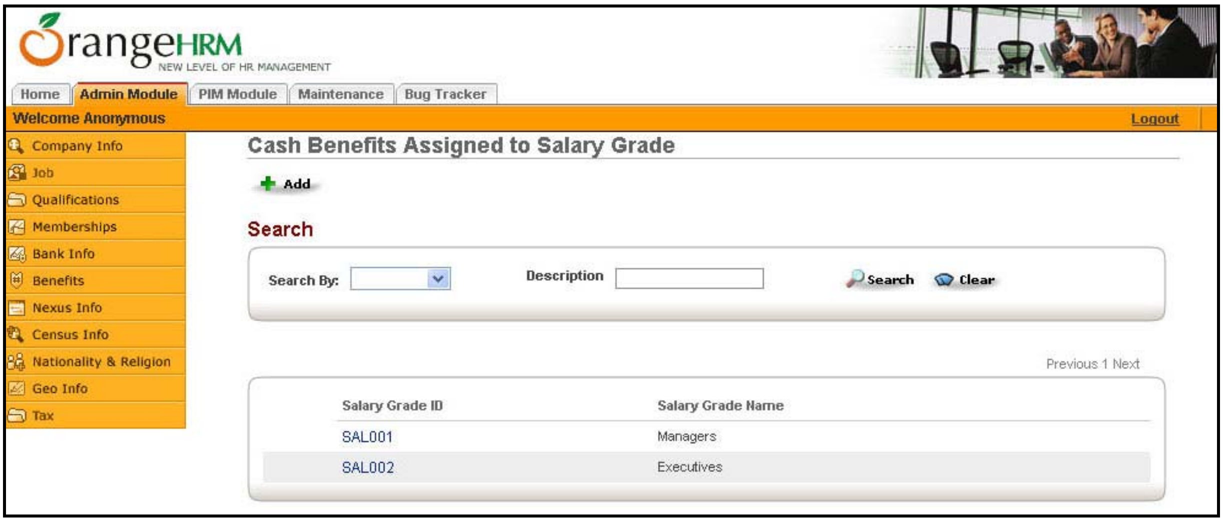

Figure 3.62

A search can be done on based on salary grades assigned with cash benefits based on Salary Grade Name or Salary Grade ID. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page. Click on the **Previous** link to move to the previous page.

3.6.4.1 Assign Cash Benefit to Salary Grade

If no Cash Benefit has been assigned to a Salary Grade that particular Salary Grade would not be displayed on this page. Therefore , in order to proceed with the assignment of a Cash Benefit, it is important to first add that Salary Grade to this page.

If the Salary Grade does not exist on this page :

1. Click on **Add** button in the Salary Grade page. A page displaying all the Salary Grades which have not been assigned with Cash Benefits assigned would be shown.
2. Click on the Salary Grade ID that is to be added.
3. All Cash Benefits that have not been assigned to this particular Salary Grade would be displayed.
4. Select the Benefit and enter the amount and click on **Save** button.

If the Salary Grade exists on the Cash Benefit Assigned to Salary Grade page :

1. Click on the Salary Grade ID for which the Cash Benefit is to be assigned. As shown in Figure 3.63 the Assigned Cash Benefits for this Salary Grade would be displayed.
2. Click on **Add** and the Cash Benefits that have not been assigned to this Salary Grade would be displayed.
3. Select the Benefit and enter the amount and click on **Save** button.

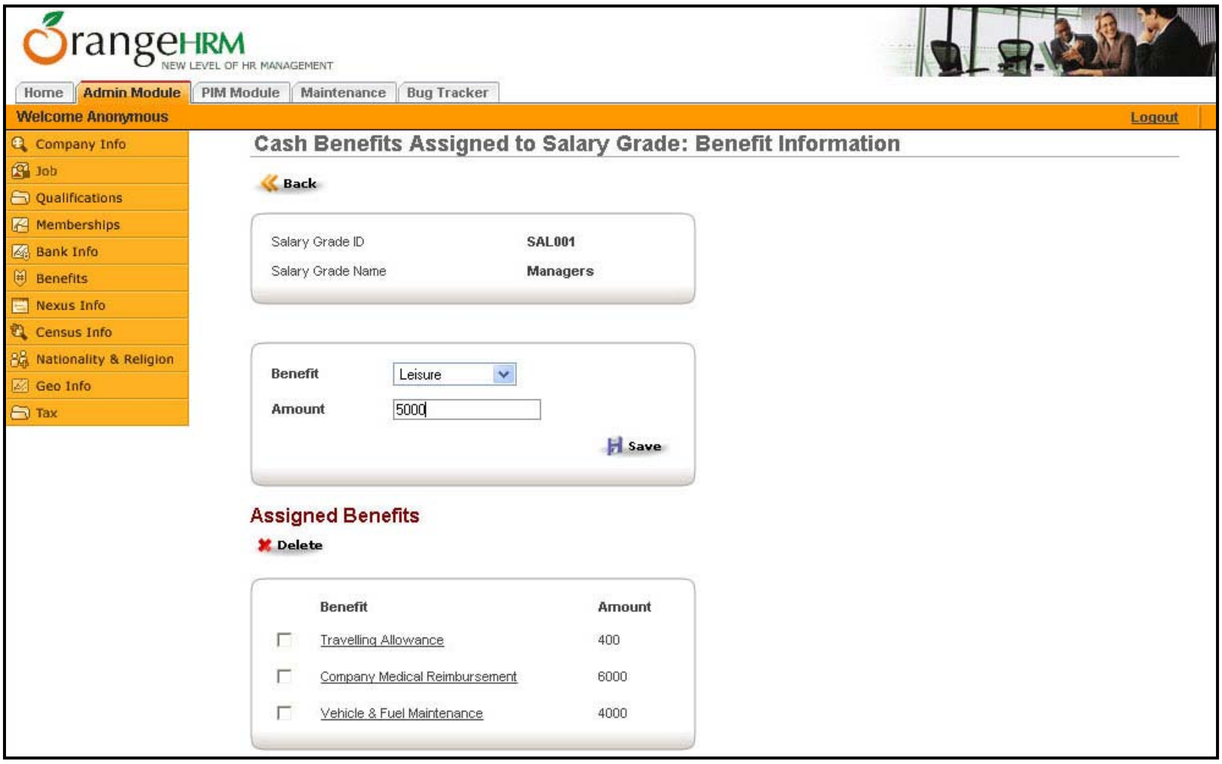

Figure 3.63

3.6.4.2 Edit Amount of Benefit Assigned to Salary Grade

1. On the Cash Benefits Assigned to Salary Grade page click on the Salary Grade ID of the assigned Benefit to be edited.
2. In the 'Assigned Benefits' section click on the Benefit that is to be edited. See Figure 3.64
3. Click on **Edit** button, make the necessary changes to the amount and then click **Save** button.

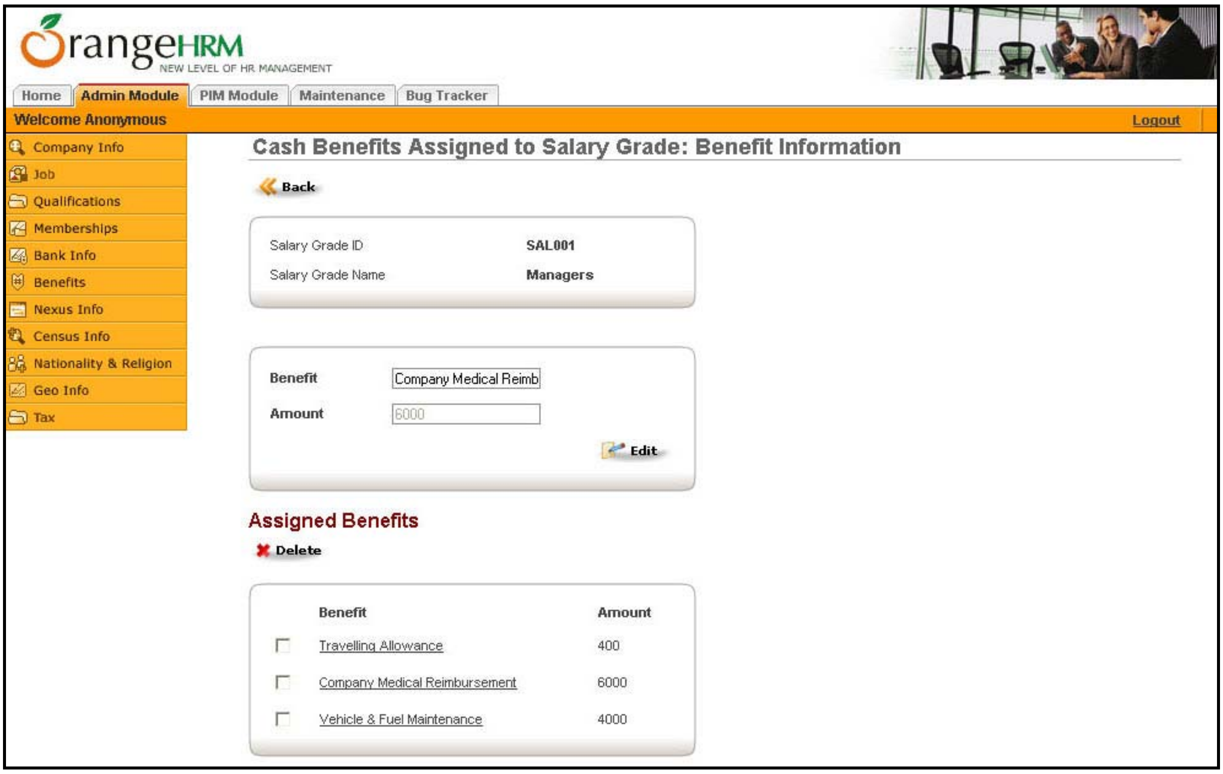

Figure 3.64

3.6.4.3 Delete Benefit Assigned Salary Grade

1. On the Cash Benefits Assigned to Salary Grade page click on the Salary Grade ID of the assigned Benefit to be deleted.
2. In the 'Assigned Benefits' section click on the checkbox against the Benefit that is to be deleted and click on **Delete** button. Refer figure 3.64.
3. Multiple Benefits assigned could be deleted simultaneously.

3.6.5 Non-Cash Benefits Assigned to Salary Grade

The Non-Cash Benefits Assigned to Salary Grade page is displayed in Figure 3.65. Non-Cash Benefits are assigned to Salary Grades in this section. Only the Salary Grades which have been assigned with a minimum of one Non-Cash Benefit would be displayed on this page.

> **NOTE:** This requires the Salary Grade be already entered to the system. Refer Section 3.2.2.1 to add a Salary Grade. The Non-Cash Benefits to assigned should also be entered to the system before assigning Non-Cash Benefits to Salary Grades. Refer section 3.6.2.1 on adding a Non-Cash Benefit.

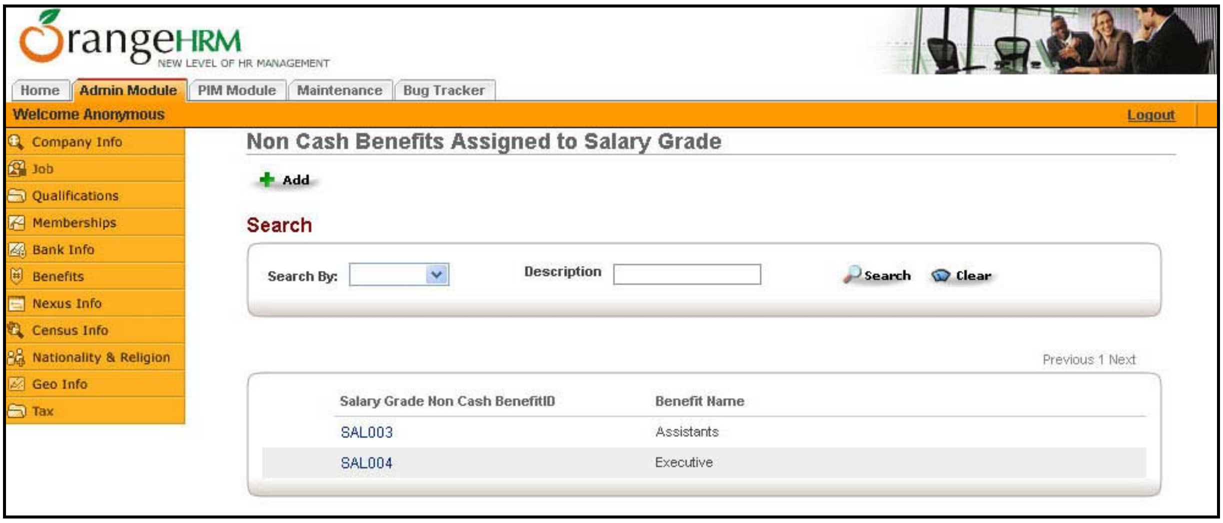

Figure 3.65

A search can be done on based on salary grades assigned with cash benefits based on Salary Grade Name or Salary Grade ID. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page. Click on the **Previous** link to move to the previous page.

3.6.5.1 Assign Non-Cash Benefit to Salary Grade

If no Non-Cash Benefit has been assigned to a Salary Grade that particular Salary Grade would not be displayed on this page. In order to proceed with the assignment of a Non-Cash Benefit, it is important to first add that Salary Grade to this page.

If the Salary Grade does not exist on this page :

1. Click on **Add** button in the Salary Grade page. A page displaying all the Salary Grades which do not have any Non-Cash Benefits assigned would be shown.
2. Click on the Salary Grade ID that is to be added.
3. All Non-Cash Benefits that have not been assigned to this particular Salary Grade would be displayed.
4. Select the Benefit and enter the amount and click on **Save** button.

If the Salary Grade exists on the Non-Cash Benefit Assigned to Salary Grade page :

1. Click on the Salary Grade ID for which the Non-Cash Benefit is to be assigned. As shown in Figure 3.66 the Assigned Non-Cash Benefits for this Salary Grade would be displayed.

2. Click on **Add** and the Non-Cash Benefits that have not been assigned to this Salary Grade would be displayed.

3. Select the Benefit and enter the amount and click on **Save** button.

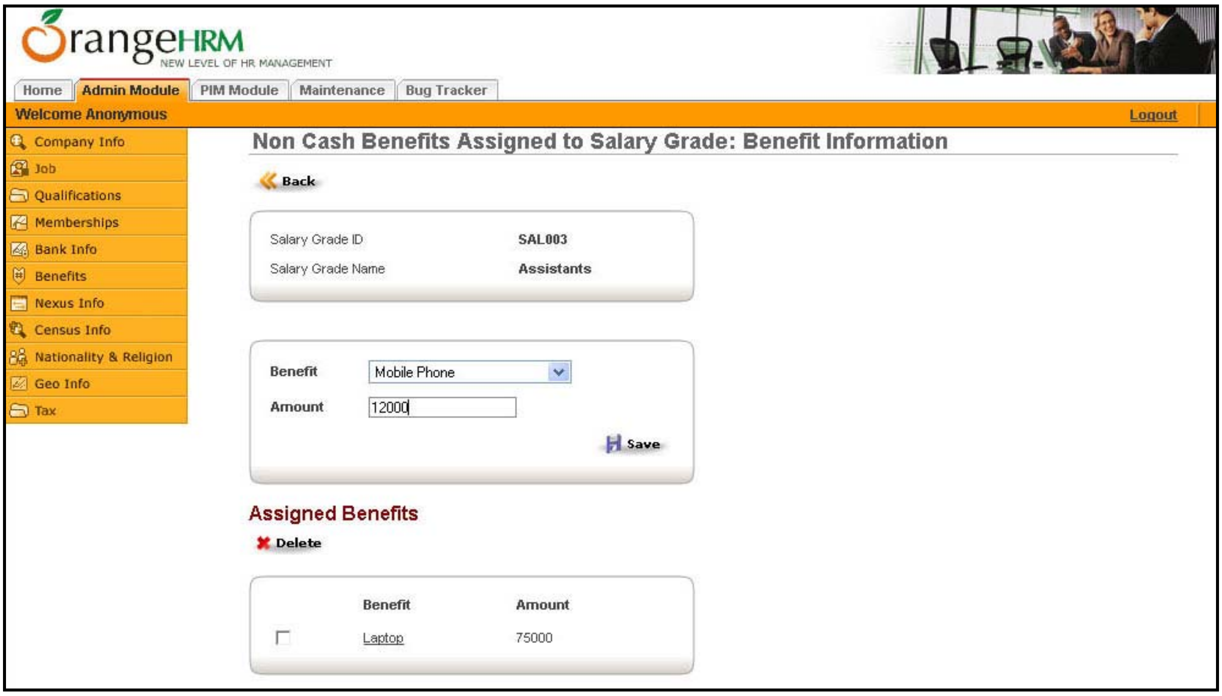

Figure 3.66

3.6.5.2 Edit Amount of Non-Cash Benefit Assigned to Salary Grade

1. On the Non-Cash Benefits Assigned to Salary Grade page click on the Salary Grade ID of the assigned Benefit to be edited.

2. In the 'Assigned Benefits' section click on the Benefit that is to be edited. See Figure 3.67.

3. Click on **Edit** button, make the necessary changes to the amount and then click **Save** button.

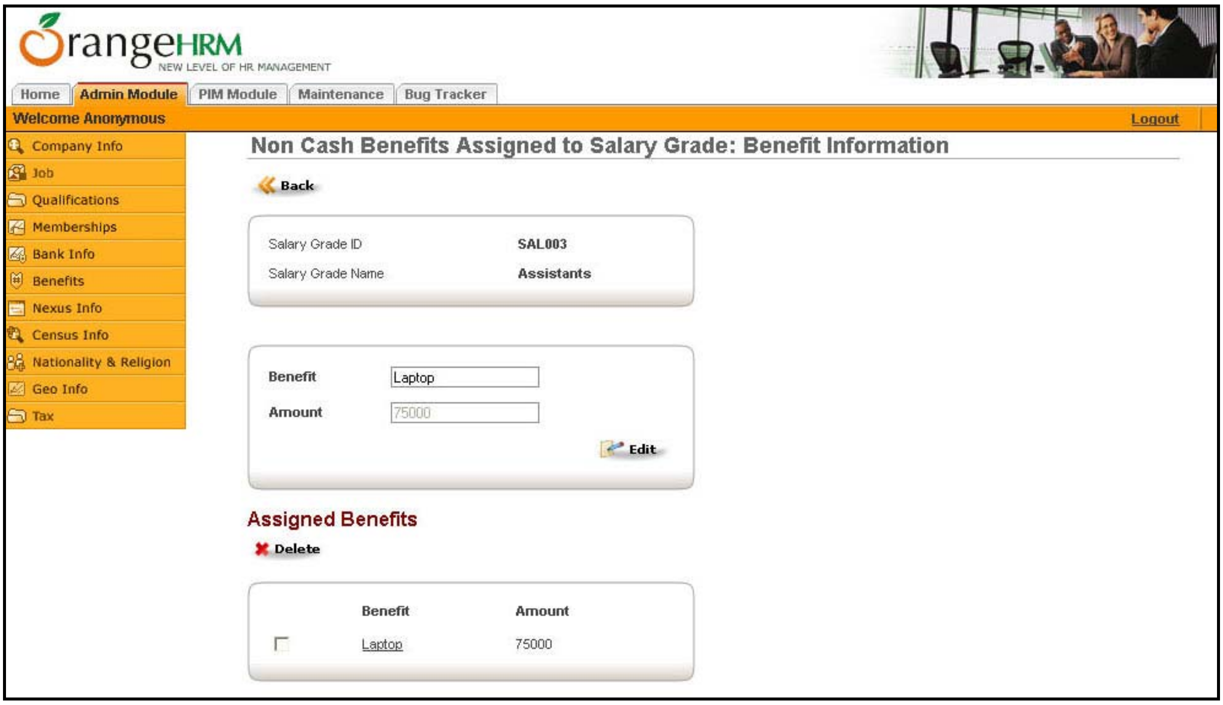

Figure 3.67

3.6.5.3 Delete Non-Cash Benefit Assigned Salary Grade

1. On the Non-Cash Benefits Assigned to Salary Grade page click on the Salary Grade ID of the assigned Benefit to be deleted.
2. In the 'Assigned Benefits' section click on the checkbox against the Benefit that is to be deleted and click on **Delete** button.
3. Multiple Benefits assigned could be deleted simultaneously.

3.7 Nexus Info

Nexus information can be handled by selecting Nexus Info from the menu. The sub menu consists of the following commands.

- Employee Type
- Statutory Status
- Employee Category
- Employee Groups

3.7.1 Employee Type

The Employee Type page is displayed in Figure 3.68. The different types of employment can be defined in the System.

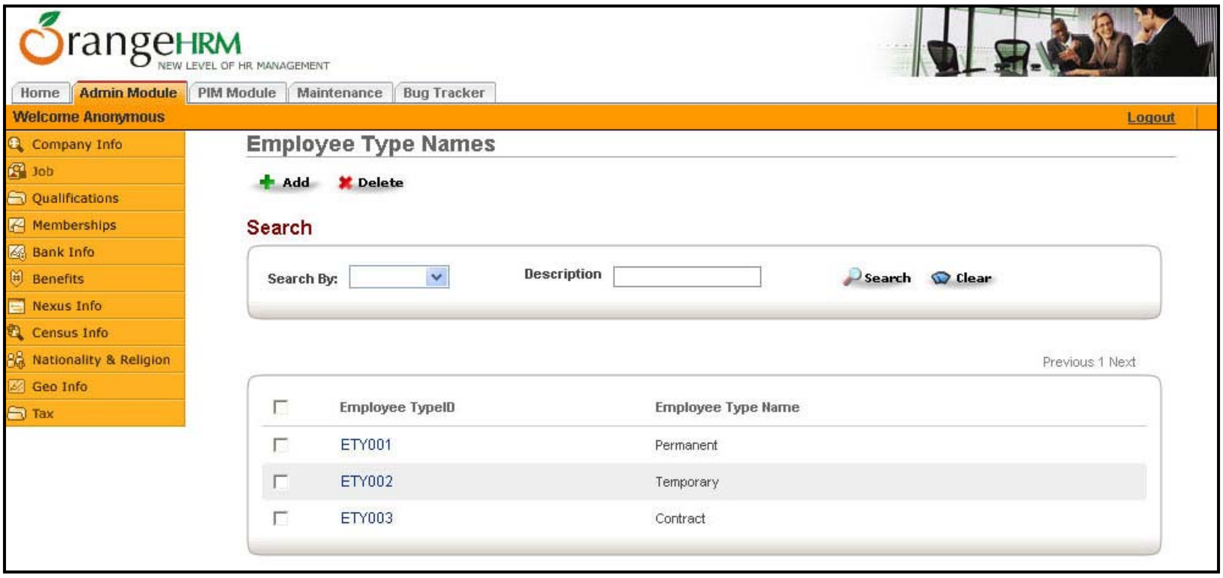

Figure 3.68

A search can be done on Employee Type based on Employee Type ID or Employee Type Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Employee Type. Click on the **Previous** link to move to the previous page of Employee Type.

3.7.1.1 Add Employee Type

This would enable the addition of an Employee Type. Click on **Add** button in the Employee Type page. The page used to add an Employee Type is displayed in Figure 3.69.

1. Employee Type ID is automatically generated.
2. Enter the Description (Employee Type Name)
3. Click on the checkbox Limit if required
4. Enter Prefix

Click **Save button**. If the save is successful, the Employee Type page is displayed with a 'Addition Successful' Notification.

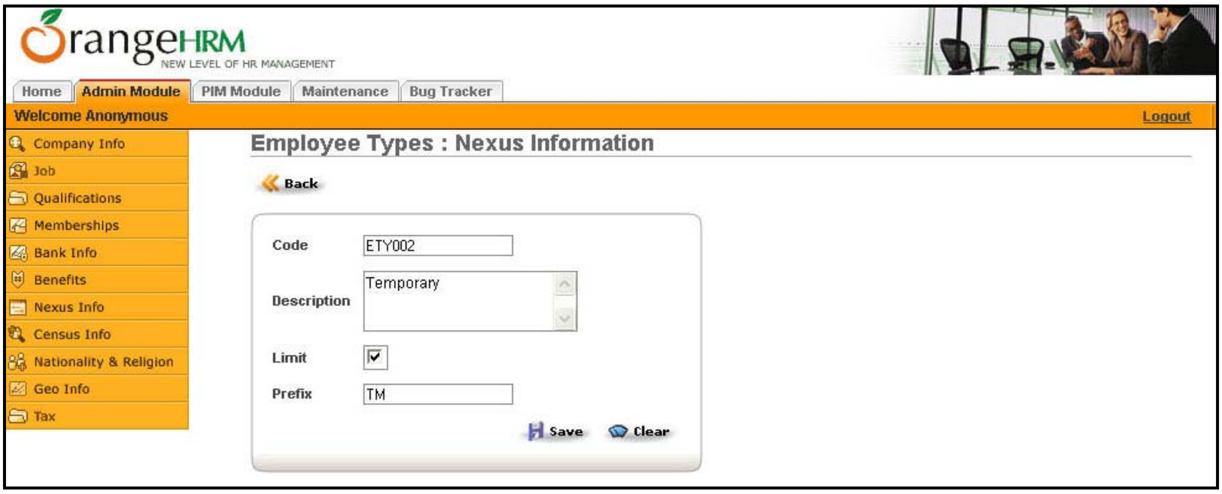

Figure 3.69

3.7.1.2 Edit Employee Type

Click on the Employee Type ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.7.1.3 Delete Employee Type

This would enable the user to delete a Employee Type. Click on the checkbox against the Employee Type ID to be deleted and click **Delete** button. Multiple Employee Types could be deleted simultaneously.

3.7.2 Statutory Classification

The Statutory page is displayed in Figure 3.70. Cash benefits that can be assigned to employees are specified in the system.

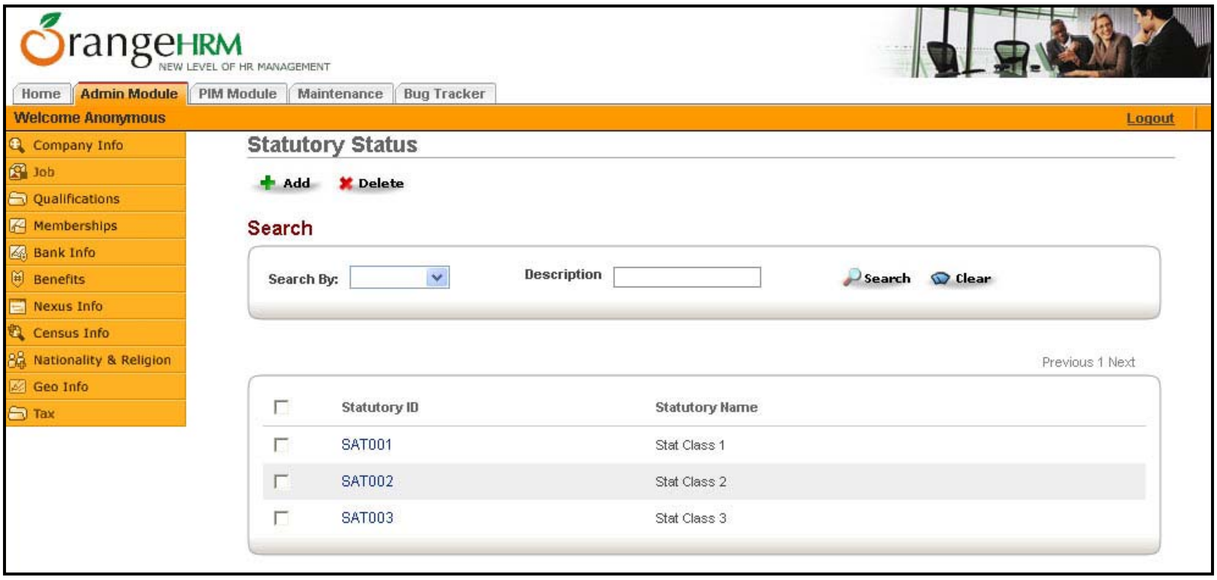

Figure 3.70

A search can be done on statutory based on Statutory ID or Statutory Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Statutory Type. Click on the **Previous** link to move to the previous page of Statutory Type.

3.7.2.1 Add Statutory Status

This would enable the addition of a Statutory Status. Click on **Add** button in the Statutory Status page. The page used to add an Statutory Status is displayed in Figure 3.71.

1. Statutory ID is automatically generated.
2. Enter the Description (Statutory Status Name)

Click **Save button**. If the Save is successful, the Statutory Status page is displayed with a 'Addition Successful' Notification.

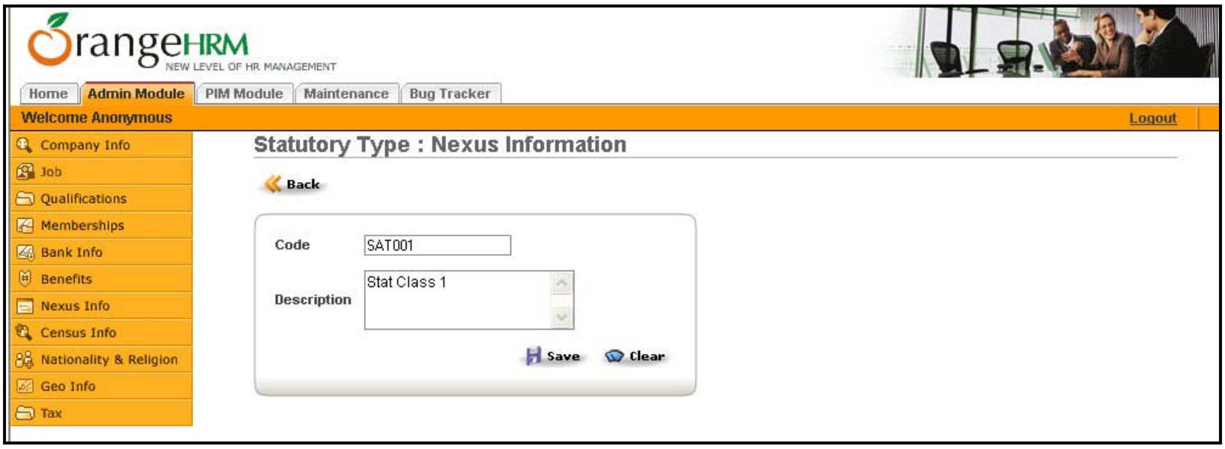

Figure 3.71

3.7.2.2 Edit Statutory Status

Click on the Statutory Status ID of the relative Statutory Status that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.7.2.3 Delete Statutory Status

This would enable the user to delete a Statutory Status. Click on the checkbox against the Statutory Status ID to be deleted and click **Delete** button. Multiple Statutory Statuses could be deleted simultaneously.

3.7.3 Employee Category

The Employee Category page is displayed in Figure 3.72. The different employee categories can be defined in the system.

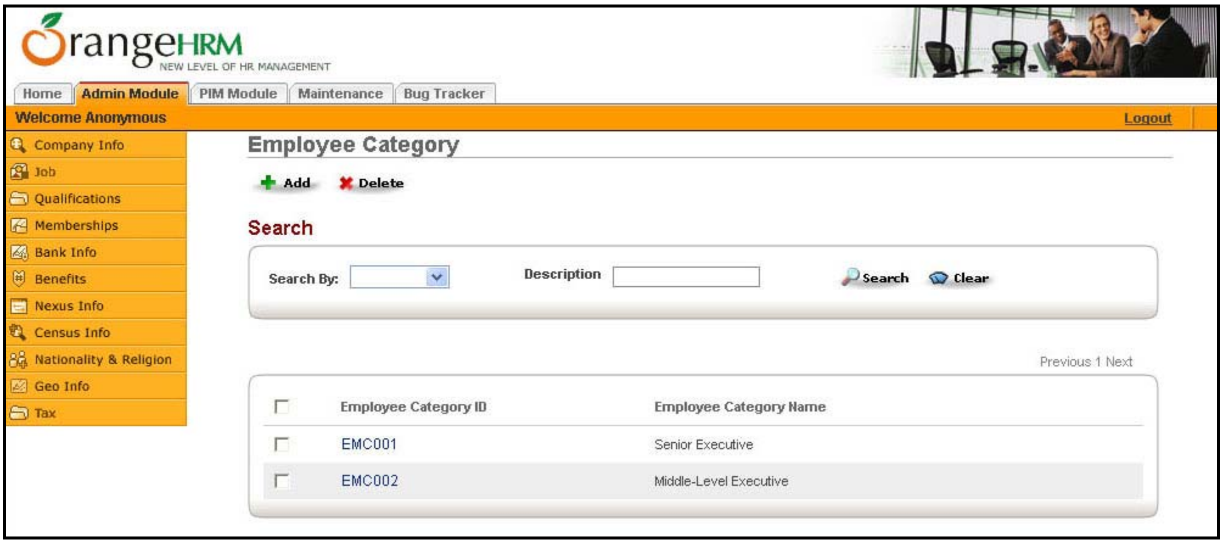

Figure 3.72

A search can be done on Employee Category based on Employee Category ID or Employee Category Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Employee Category. Click on the **Previous** link to move to the previous page of Employee Category.

3.7.3.1 Add Employee Category

This would enable the addition of and Employee Category. Click on **Add** button in the Employee Category page. The page used to add an Employee Category is displayed in Figure 3.73.

1. Employee Category ID is automatically generated.
2. Enter the Description (Employee Category Name)

Click **Save button**. If the save is successful, the Employee Category page is displayed with a 'Addition Successful' Notification.

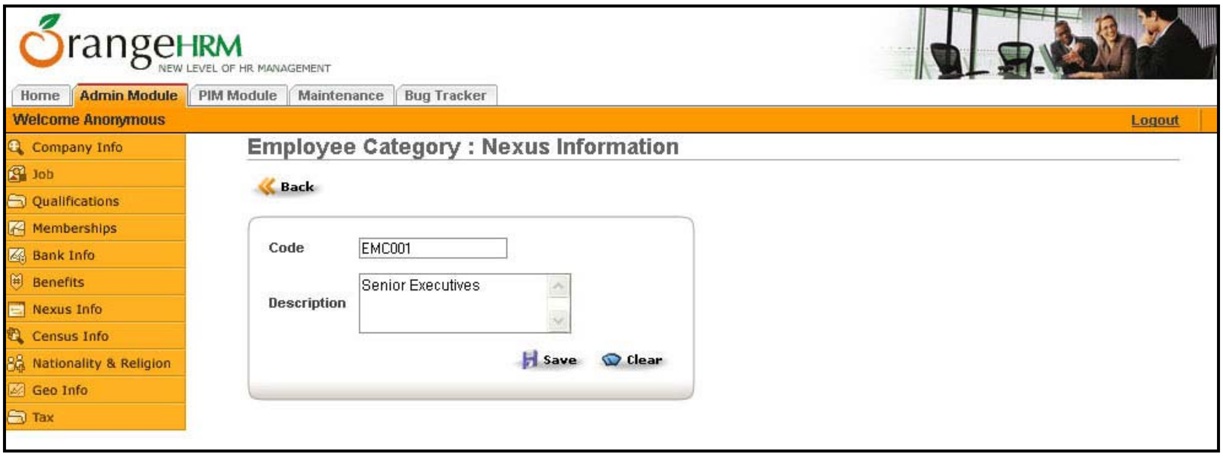

Figure 3.73

3.7.3.2 Edit Employee Category

Click on the Employee Category ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.7.3.3 Delete Employee Category

This would enable the user to delete a Employee Category. Click on the checkbox against the Employee Category ID to be deleted and click **Delete** button. Multiple Employee Category could be deleted simultaneously.

3.7.4 Employee Groups

The Employee Groups page is displayed in Figure 3.74. The various employee groups can be specified in the System.

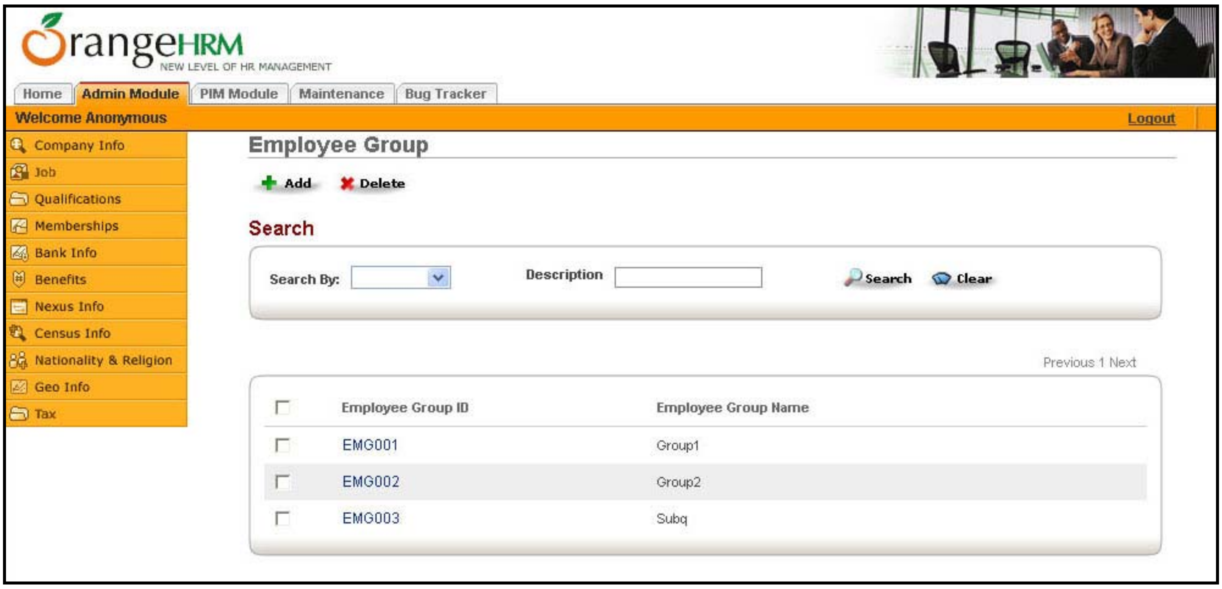

Figure 3.74

A search can be done on Employee Group based on Employee Group ID or Employee Group Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Employee Group. Click on the **Previous** link to move to the previous page of Employee Group.

3.7.4.1 Add Employee Groups

This would enable the addition of an Employee Groups. Click on **Add** button in the Employee Groups page. The page used to add an Employee Groups is displayed in Figure 3.75.

1. Employee Group ID is automatically generated.
2. Enter the Description (Employee Group Name)

Click **Save button**. If the save is successful, the Employee Groups page is displayed with a 'Addition Successful' Notification.

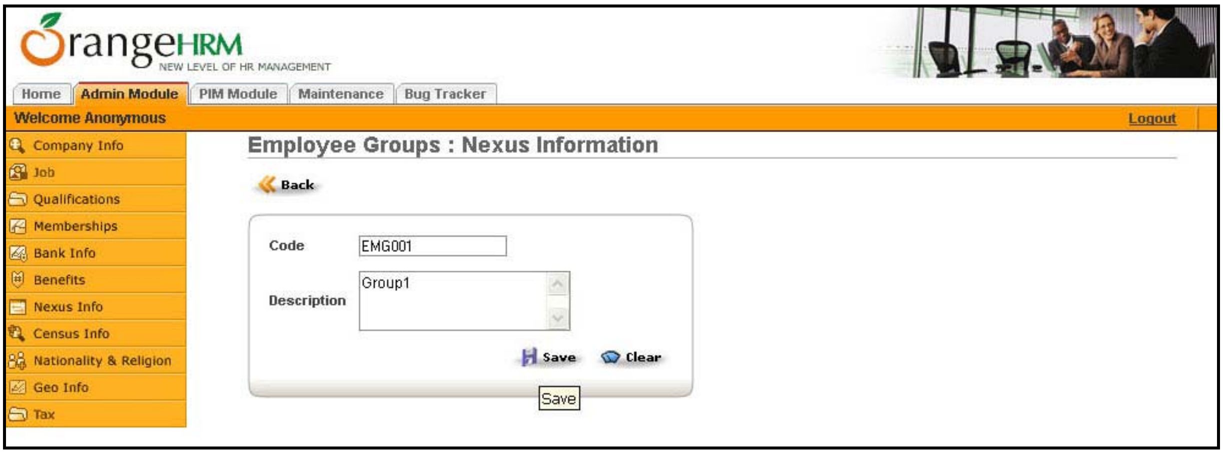

Figure 3.75

3.7.4.2 Edit Employee Groups

Click on the Employee Groups ID of the relative Employee Groups Name that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.7.4.3 Delete Employee Groups

This would enable the user to delete a Employee Groups. Click on the checkbox against the Employee Groups ID to be deleted and click **Delete** button. Multiple Employee Groups could be deleted simultaneously.

3.8 Census Info

Nexus information can be handled by selecting Nexus Info from the menu. The sub menu consists of the following commands.

- Route Information
- Dwelling Type

3.8.1 Route Information

The Route Information page is displayed in Figure 3.76. This specifies the different routes that employees travelling between work and home.

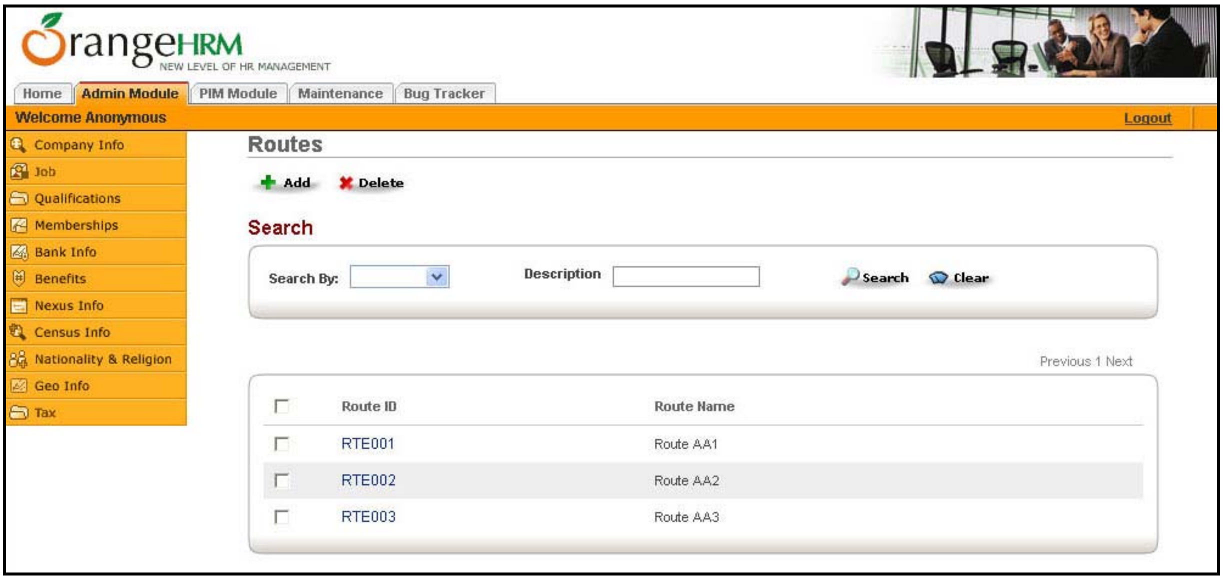

Figure 3.76

A search can be done on Routes based on Route ID or Route Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Routes. Click on the **Previous** link to move to the previous page of Routes.

3.8.1.1 Add Route Information

This would enable the addition of an Route Information. Click on **Add** button in the Route Information page. The page used to add a Route Information is displayed in Figure 3.77.

1. Route ID is automatically generated.
2. Enter the Description (Route Name)

Click **Save button**. If the save is successful, the Route Information page is displayed with a 'Addition Successful' Notification.

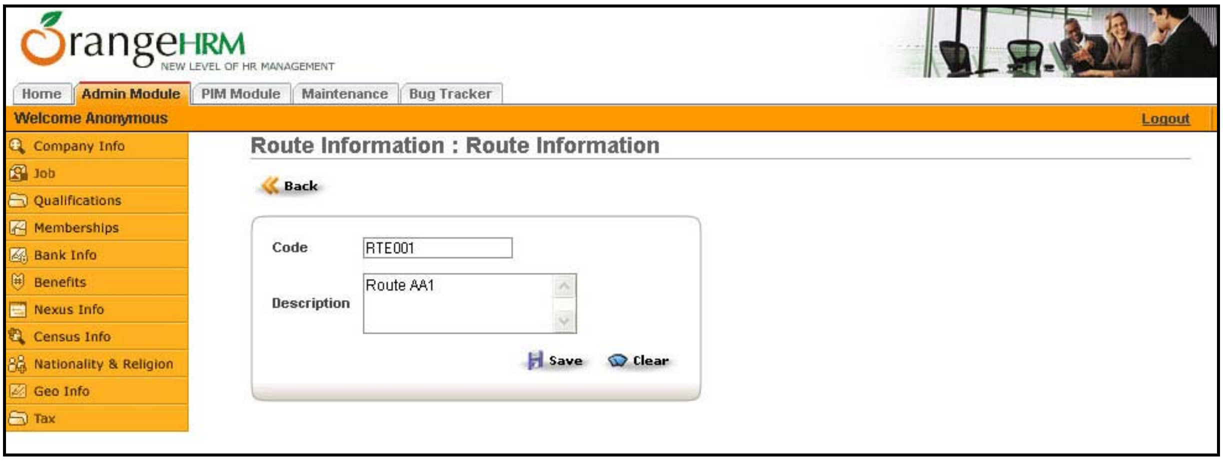

Figure 3.77

3.8.1.2 Edit Route Information

Click on the Route ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.8.1.3 Delete Route Information

This would enable the user to delete a Route. Click on the checkbox against the Route ID to be deleted and click **Delete** button. Multiple routes can be deleted simultaneously.

3.8.2 Dwelling Type

The Dwelling Types page is displayed in Figure 3.78. The different dwelling types of employees can be specified in the system.

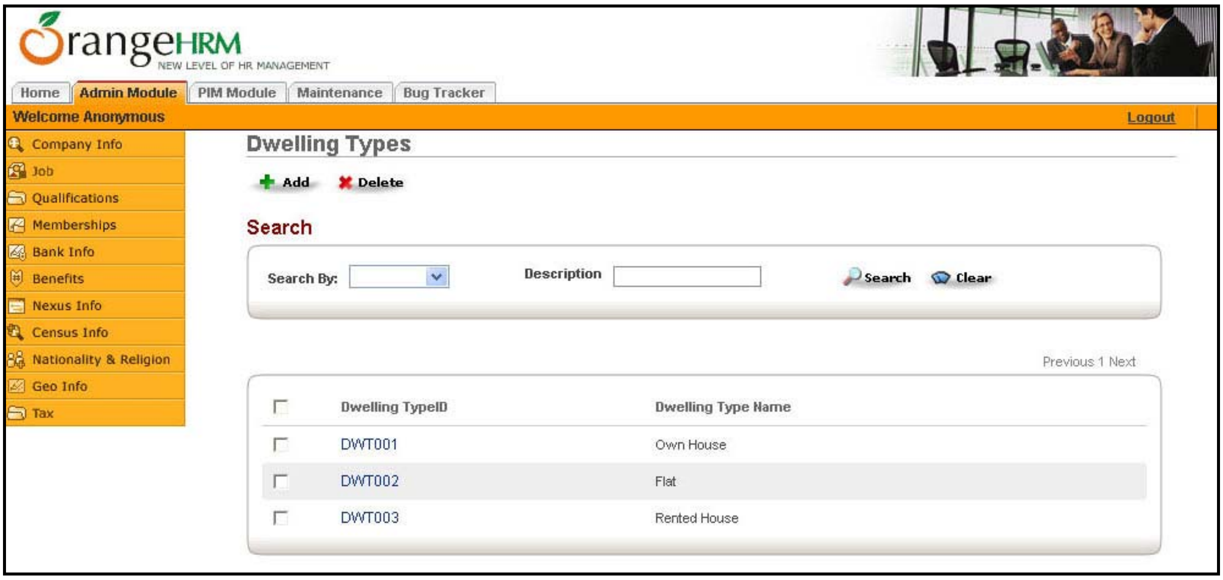

Figure 3.78

A search can be done on Dwelling Types based on Dwelling Type ID or Dwelling Type Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Dwelling Types. Click on the **Previous** link to move to the previous page of Dwelling Types.

3.8.2.1 Add Dwelling Type

This would enable the addition of a Dwelling Type. Click on **Add** button in the Dwelling Type page. The page used to add a Dwelling Type is displayed in Figure 3.79.

1. Dwelling Type ID is automatically generated.
2. Enter the Description (Dwelling Type Name)

Click **Save button**. If the save is successful, the Dwelling Type page is displayed with a 'Addition Successful' Notification.

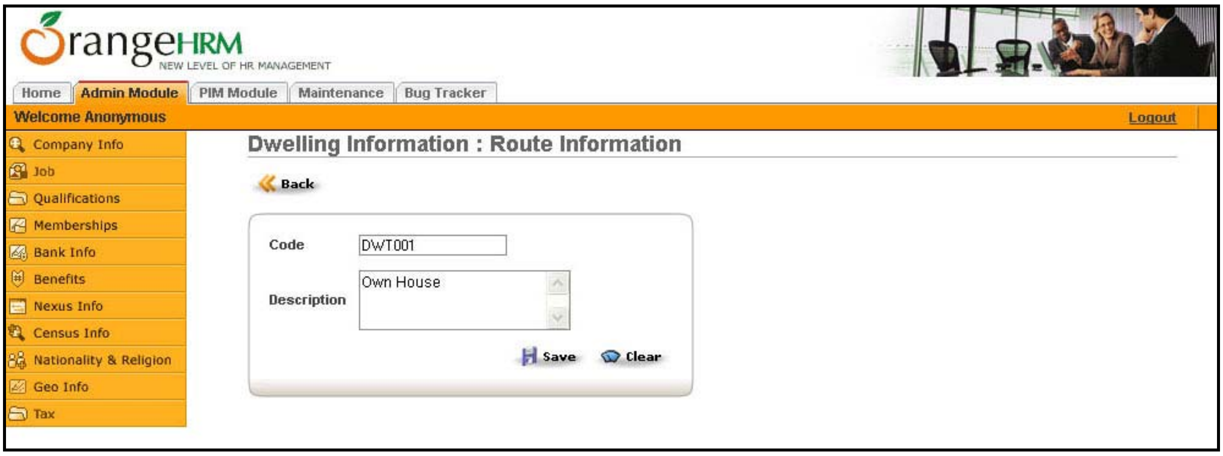

Figure 3.79

3.8.2.2 Edit Dwelling Type

Click on the Dwelling Type ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.8.2.3 Delete Dwelling Type

This would enable the user to delete a Dwelling Type. Click on the checkbox against the Dwelling Type ID to be deleted and click **Delete** button. Multiple Dwelling Types could be deleted simultaneously.

3.9 Nationality and Religion

Nationalities and religions can be specified by selecting Nationality & Religion from the menu. The sub menu consists of the following commands.

- Nationalities
- Religions

3.9.1 Nationalities

The Nationality page is displayed in Figure 3.80. The different Nationalities of employees can be specified in the system.

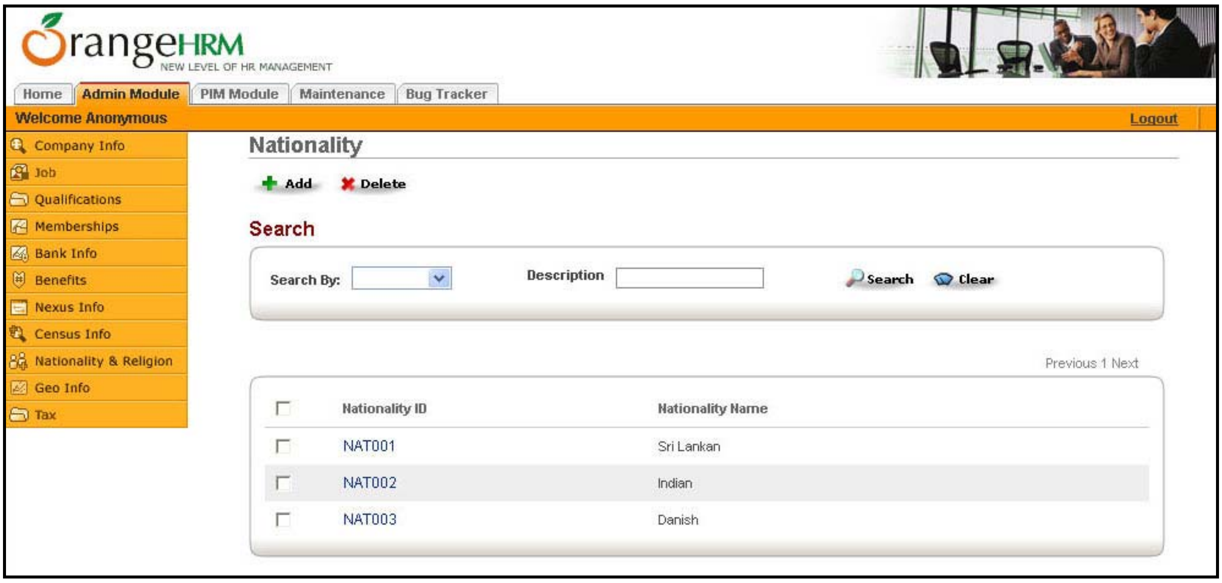

Figure 3.80

A search can be done on Nationalities based on Nationality ID or Nationality Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Nationality. Click on the **Previous** link to move to the previous page of Nationality.

3.9.1.1 Add Nationality

This would enable the addition of a Nationality. Click on **Add** button in the Nationality page. The page used to add a Nationality is displayed in Figure 3.81.

1. Nationality ID is automatically generated.
2. Enter the Description (Nationality Name)

Click **Save button**. If the save is successful, the Nationality page is displayed with a 'Addition Successful' Notification.

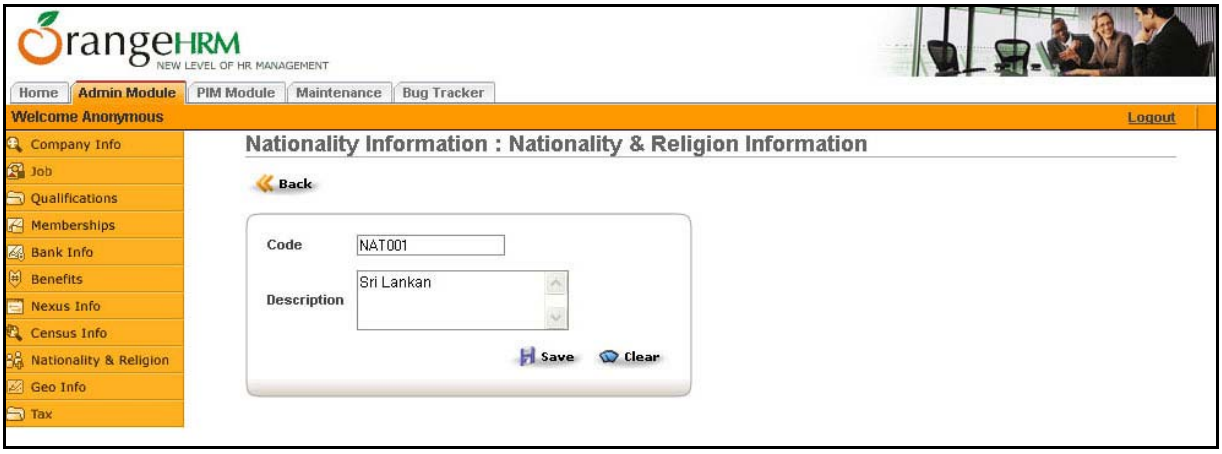

Figure 3.81

3.9.1.2 Edit Nationality

Click on the Nationality ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.9.1.3 Delete Nationality

This would enable the user to delete a Nationality. Click on the checkbox against the Nationality ID to be deleted and click **Delete** button. Multiple Nationalities could be deleted simultaneously.

3.9.2 Religions

The Religions page is displayed in Figure 3.82. The different religions of employees can be specified in the system.

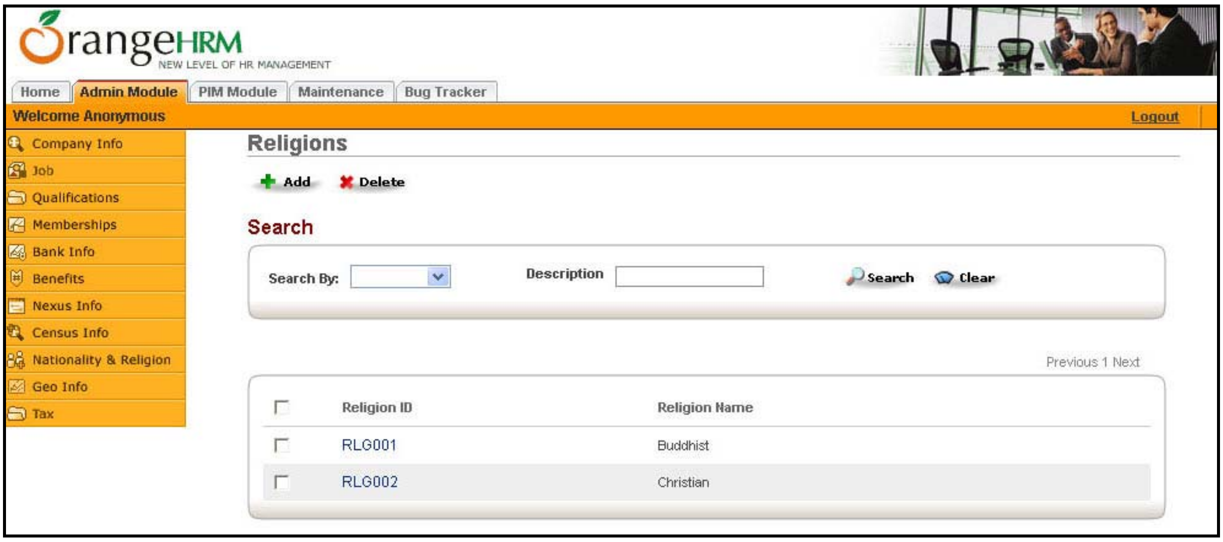

Figure 3.82

A search can be done on Religions based on Religion ID or Religion Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Religion. Click on the **Previous** link to move to the previous page of Religion.

3.9.2.1 Add Religion

This would enable the addition of a Religion. Click on **Add** button in the Religions page. The page used to add a Religion is displayed in Figure 3.83.

1. Religion ID is automatically generated.

2. Enter the Description (Religion Name)

Click **Save button**. If the save is successful, the Religion page is displayed with a 'Addition Successful' Notification.

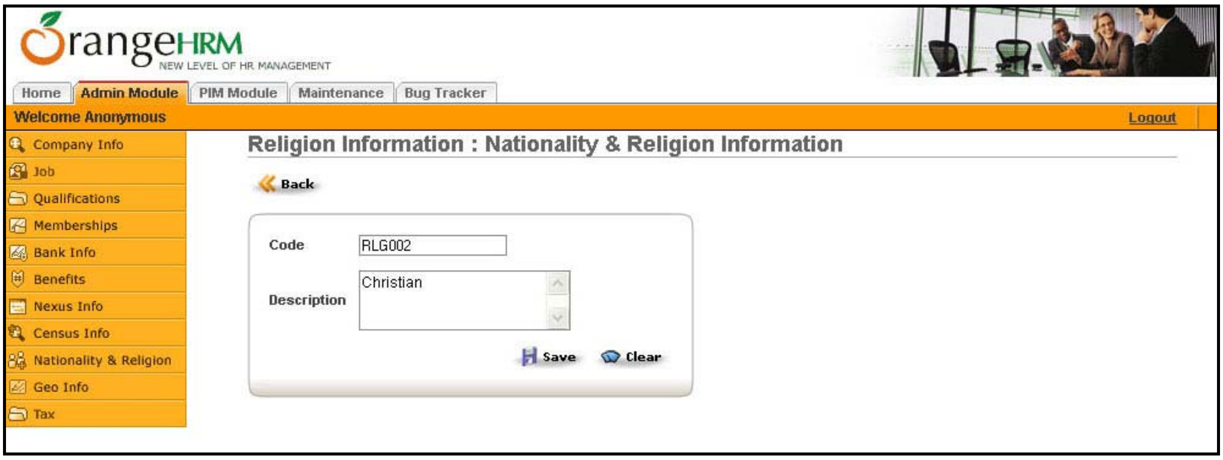

Figure 3.83

3.9.2.2 Edit Religion

Click on the Religion ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.9.2.3 Delete Religion

This would enable the user to delete a Religion. Click on the checkbox against the Religion ID to be deleted and click **Delete** button. Multiple religions could be deleted simultaneously.

3.10 Geo Info

Geo Information can be specified by selecting Geo Info from the menu. The sub menu consists of the following commands.

- Country
- State
- County
- Electorate

3.10.1 Country

The Country page is displayed in Figure 3.84. Different countries can be specified in the system.

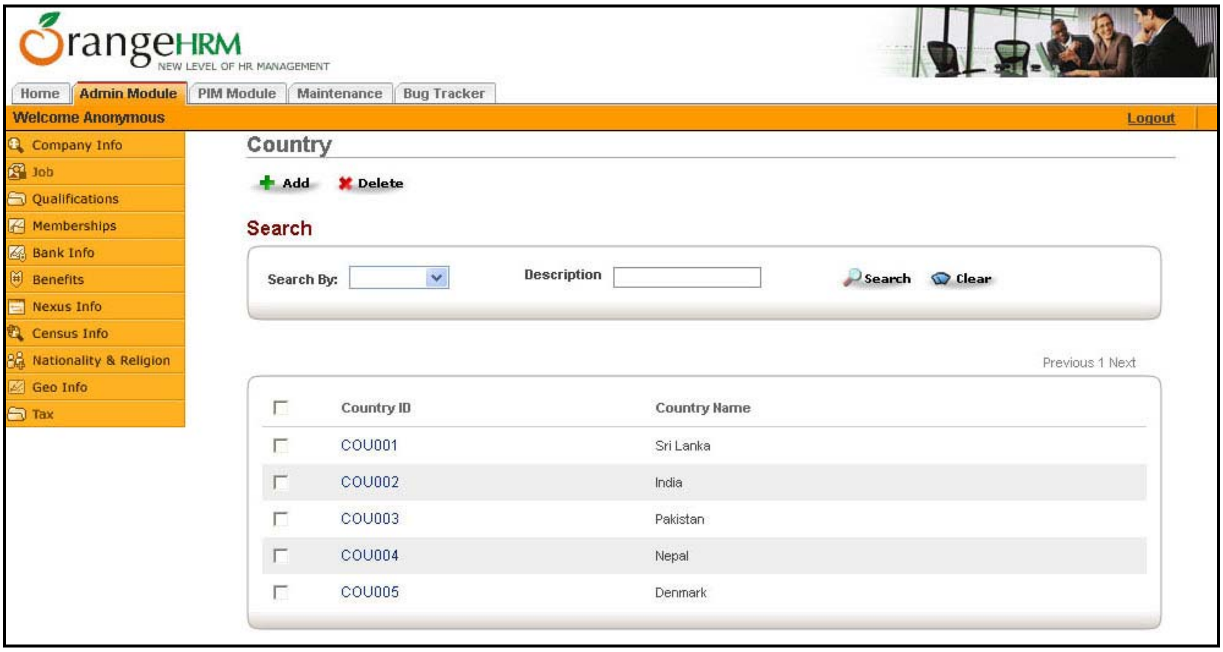

Figure 3.84

A search can be done on Country based on Country ID or Country Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Country. Click on the **Previous** link to move to the previous page of Country.

3.10.1.1 Add Country

This would enable the addition of a Country. Click on **Add** button in the Country Information page. The page used to add a Country is displayed in Figure 3.85.

1. Country ID is automatically generated.
2. Enter the Description (Country Name)

Click **Save button**. If the save is successful, the Country Information page is displayed with a 'Addition Successful' Notification.

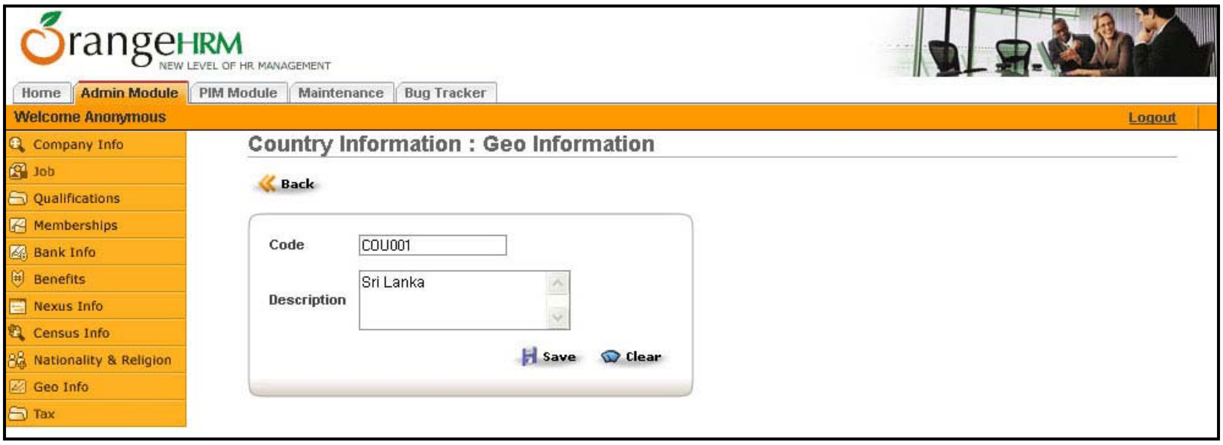

Figure 3.85

3.10.1.2 Edit Country

Click on the Country ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.10.1.3 Delete Country

This would enable the user to delete a Country. Click on the checkbox against the Country ID to be deleted and click **Delete** button. Multiple countries could be deleted simultaneously.

3.10.2 State

The State Information page is displayed in Figure 3.86. Different States can be specified in the system.

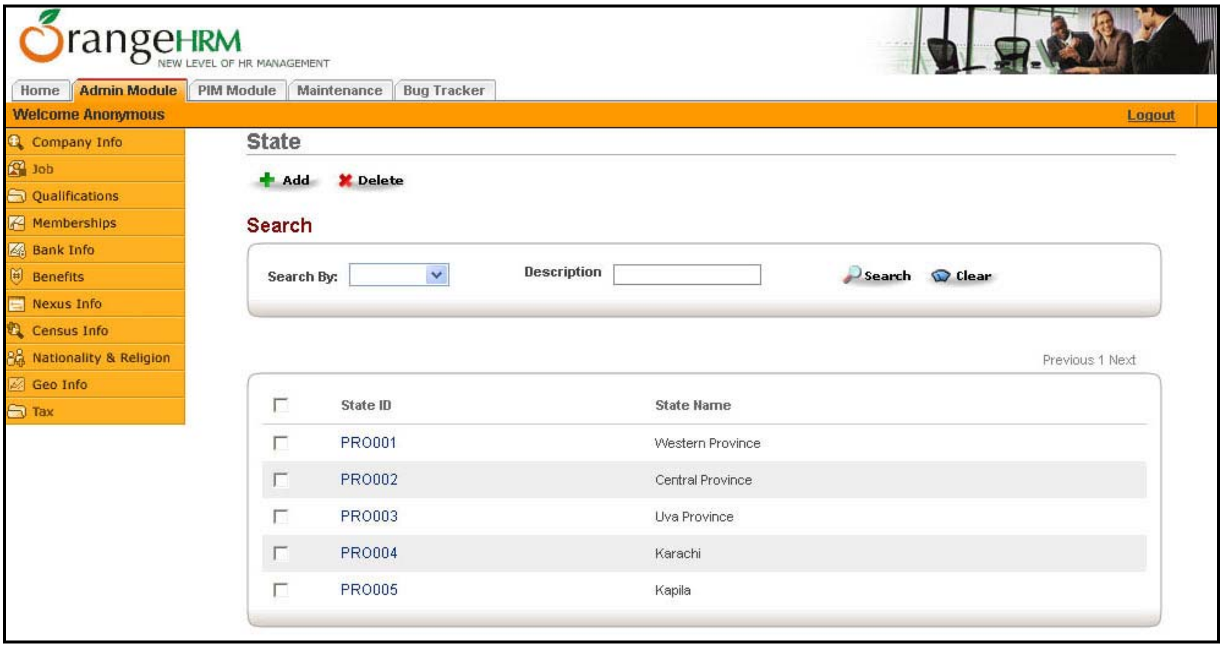

Figure 3.86

A search can be done on State based on State ID or State Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of State. Click on the **Previous** link to move to the previous page of State.

3.10.2.1 Add State

This would enable the addition of a State. Click on **Add** button in the State Information page. The page used to add a State is displayed in Figure 3.87.

1. State ID is automatically generated.

2. Enter the Description (State Name)

Click **Save button**. If the save is successful, the State Information page is displayed with a 'Addition Successful' Notification.

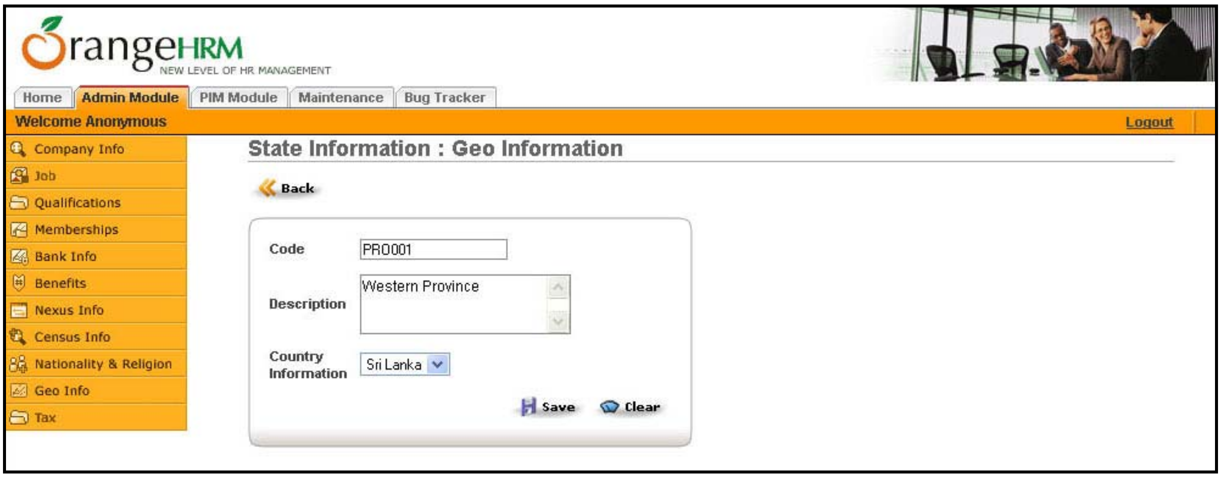

Figure 3.87

3.10.2.2 Edit State

Click on the State ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.10.2.3 Delete State

This would enable the user to delete a State. Click on the checkbox against the State ID to be deleted and click **Delete** button. Multiple states could be deleted simultaneously.

3.10.3 County

The County Information page is displayed in figure 3.88. Different counties can be specified in the system.

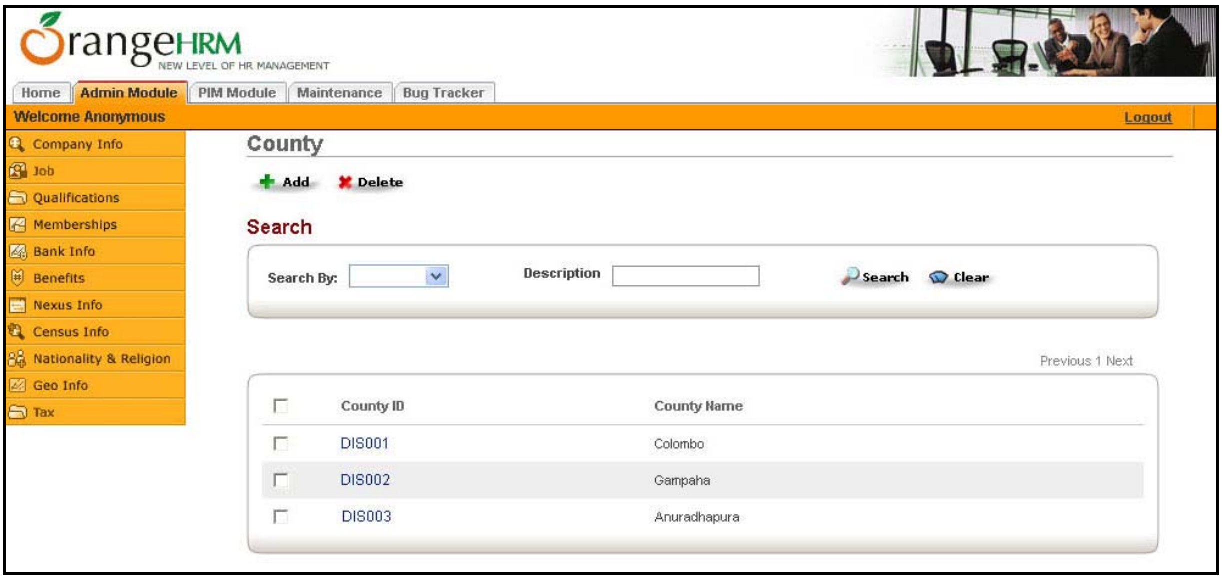

Figure 3.88

A search can be done on County Information based on County ID or County Type Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of County Type. Click on the **Previous** link to move to the previous page of County Type.

3.10.3.1 Add County

This would enable the addition of a County. Click on **Add** button in the County Information page. The page used to add a County is displayed in Figure 3.89.

1. County ID is automatically generated.
2. Enter the Description (County Name)

Click **Save button**. If the save is successful, the County Information page is displayed with a 'Addition Successful' Notification.

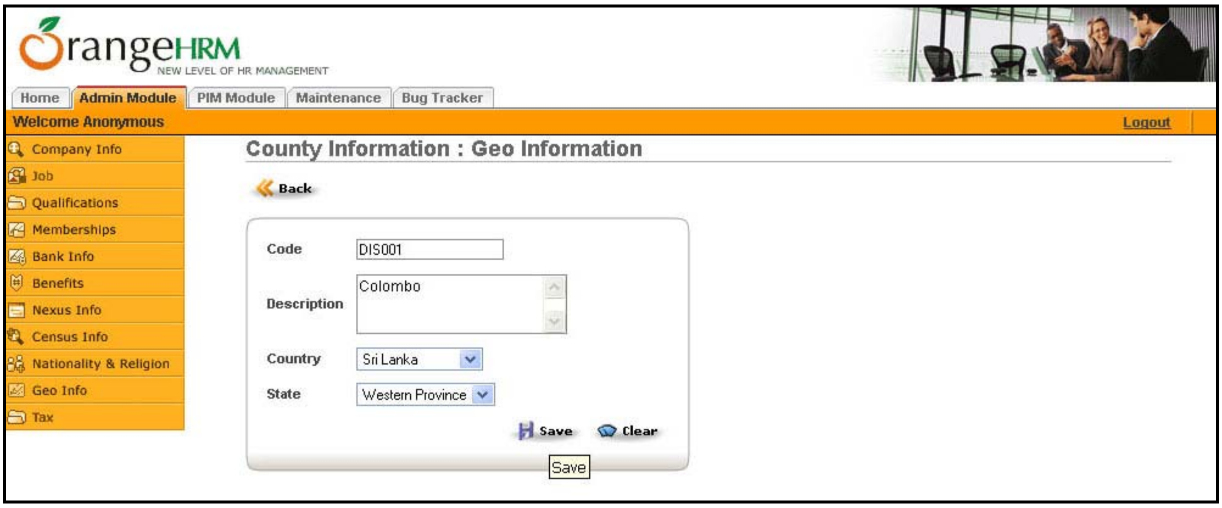

Figure 3.89

3.10.3.2 Edit County

Click on the County ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.10.3.3 Delete County

This would enable the user to delete a County. Click on the checkbox against the County ID to be deleted and click **Delete** button. Multiple counties could be deleted simultaneously.

3.10.4 Electorate

The County Information page is displayed in Figure 3.90. Different electorates can be specified in the system.

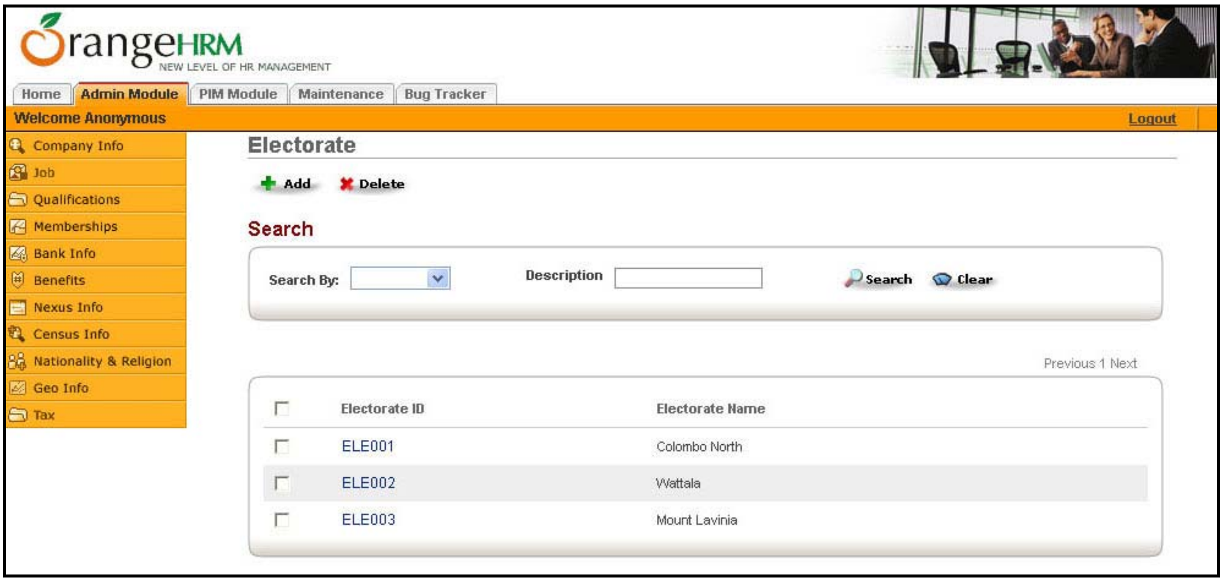

Figure 3.90

A search can be done on Electorate based on Electorate ID or Electorate Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Electorate. Click on the **Previous** link to move to the previous page of Electorate.

3.10.4.1 Add Electorate

This would enable the addition of an Electorate. Click on **Add** button in the Electorate Information page. The page used to add a Electorate is displayed in Figure 3.91.

1. Electorate ID is automatically generated.
2. Enter the Description (Electorate Name)

Click **Save button**. If the save is successful, the Electorate Information page is displayed with a 'Addition Successful' Notification.

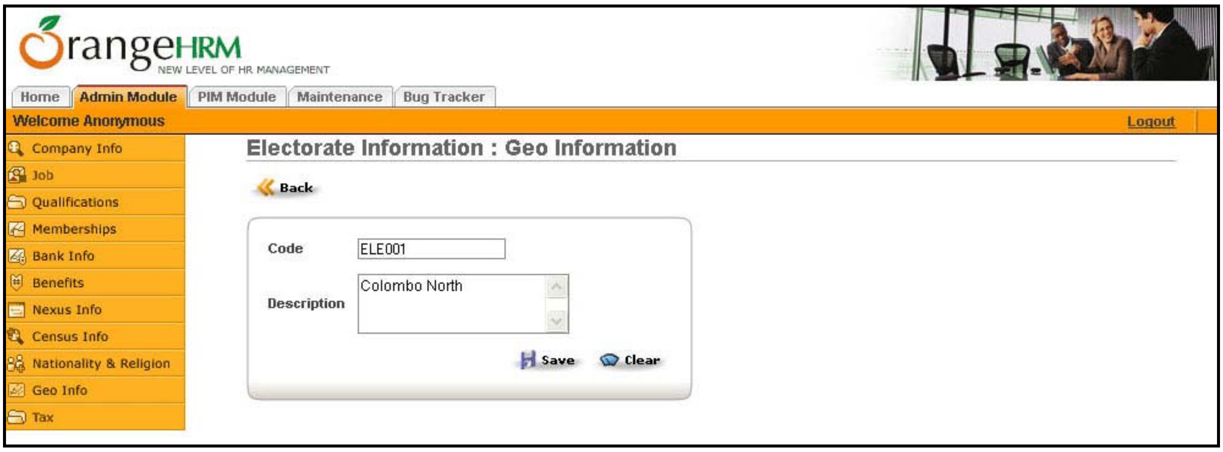

Figure 3.91

3.10.4.2 Edit Electorate

Click on the Electorate ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.10.4.3 Delete Electorate

This would enable the user to delete a Electorate. Click on the checkbox against the Electorate ID to be deleted and click **Delete** button. Multiple electorates could be deleted simultaneously.

3.11 Tax

The various taxes could be defined by selecting Tax from the menu. The sub menu has the following option.

- Define Tax

3.11.1 Define Tax

The Tax Information page is displayed in figure 3.92. Various Taxes can be defined in the system.

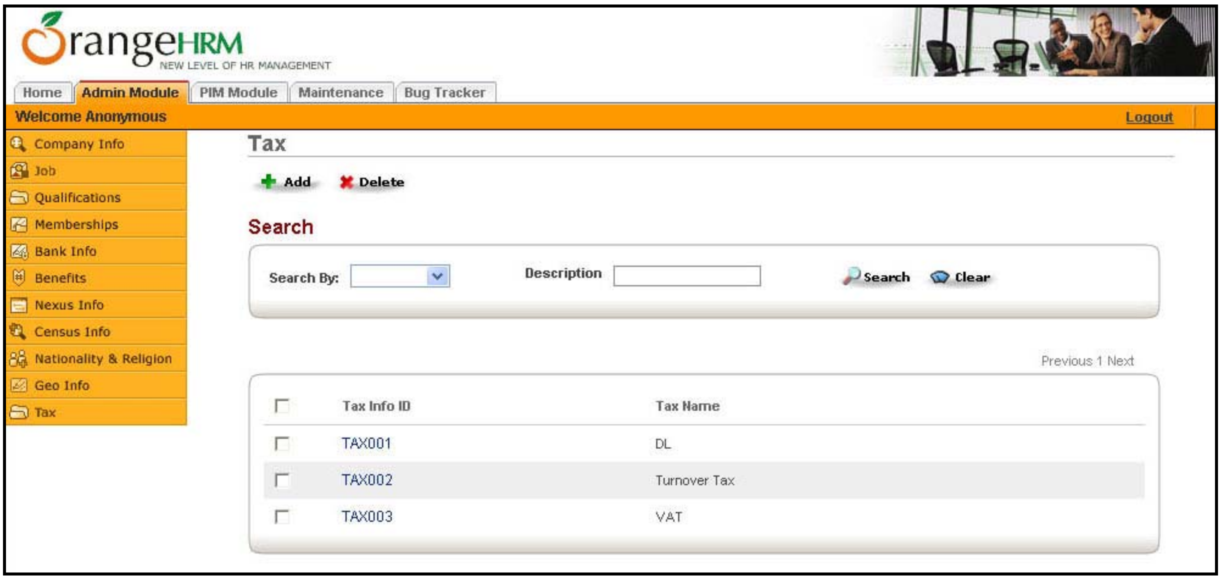

Figure 3.92

A search can be done on Tax Information based on Tax ID or Tax Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Tax Information. Click on the **Previous** link to move to the previous page of Tax Information.

3.11.1.1 Add Tax

This would enable the addition of a Tax. Click on **Add** button in the Tax Information page. The page used to add a Tax is displayed in figure 3.93.

1. Tax Info ID is automatically generated.
2. Enter the Description (Tax Name)

Click **Save button**. If the save is successful, the Tax Information page is displayed with a 'Addition Successful' Notification.

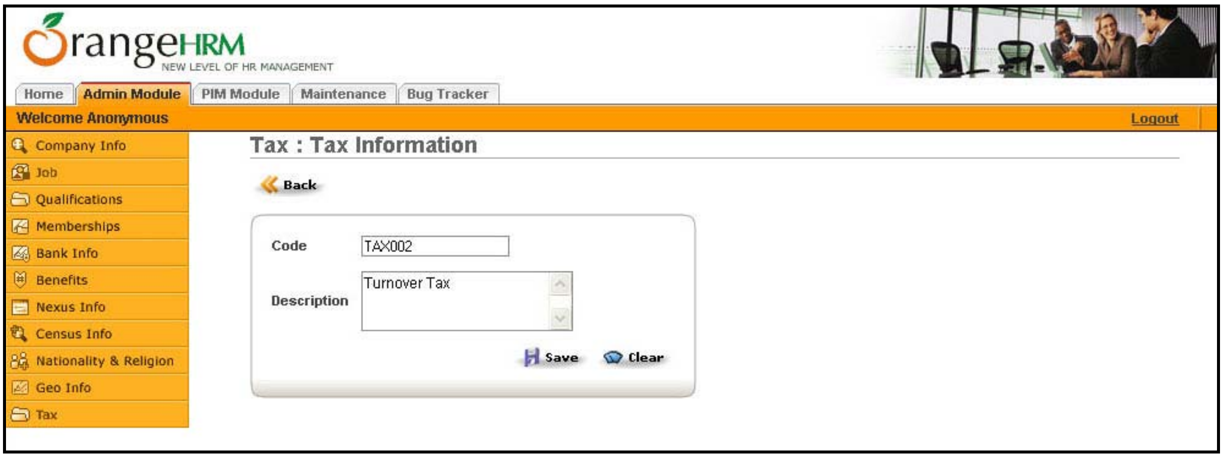

Figure 3.93

3.11.1.2 Edit Tax

Click on the Tax Info ID that needs to be edited. Click on **Edit** button, make the necessary changes and click **Save** button.

3.11.1.3 Delete Tax

This would enable the user to delete a Tax. Click on the checkbox against the Tax ID to be deleted and click **Delete** button. Multiple taxes could be deleted simultaneously.

3.12 Search

A similar search facility is available in each page of the Admin Module. See figure 3.94 illustrates the search facility.

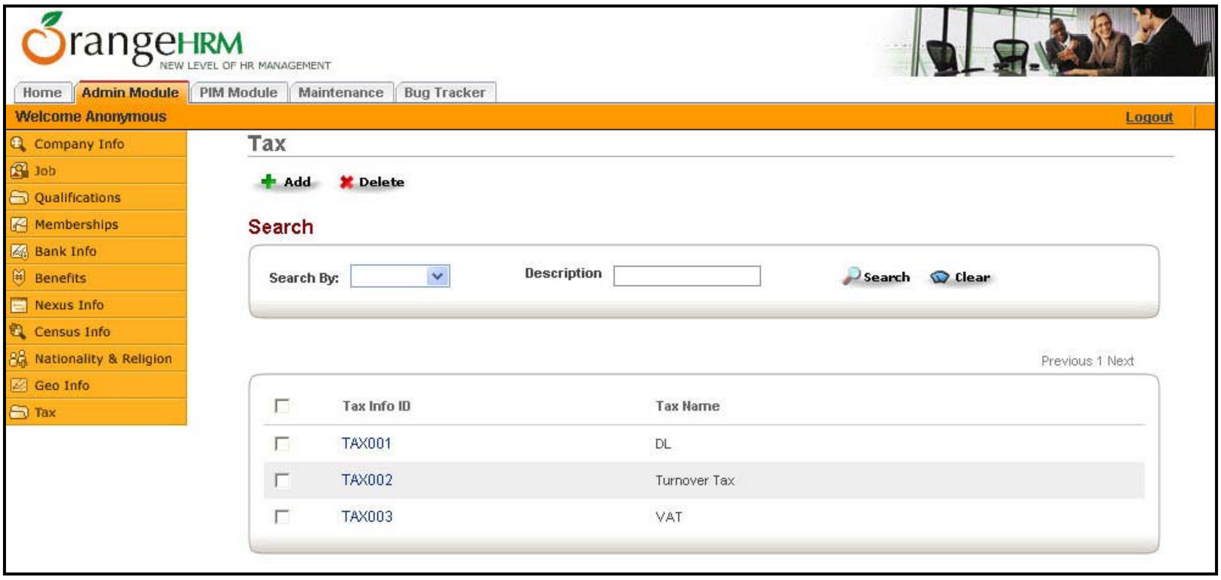

Figure 3.94

1. A search based on the ID or the Description is available. Select the suitable type of search in Search By combo box.
2. Enter value to search for in the Description text box.
3. Click on **Search** button.

The **Clear** button can be used to clear the criteria entered for the search, in the Search By combo and the Description

Chapter 4

4 PIM Module

Select **PIM Module** from the main menu. The **PIM Module** menu is displayed in Figure 4.1. Select the appropriate commands from the menu.

- Employee Information
- Work Experience
- Memberships
- Cash Benefits Assigned
- Non-Cash Benefits Assigned
- Job Profile
- Remuneration
- Assign Languages
- Extra Curricular Activities
- Contract Extend

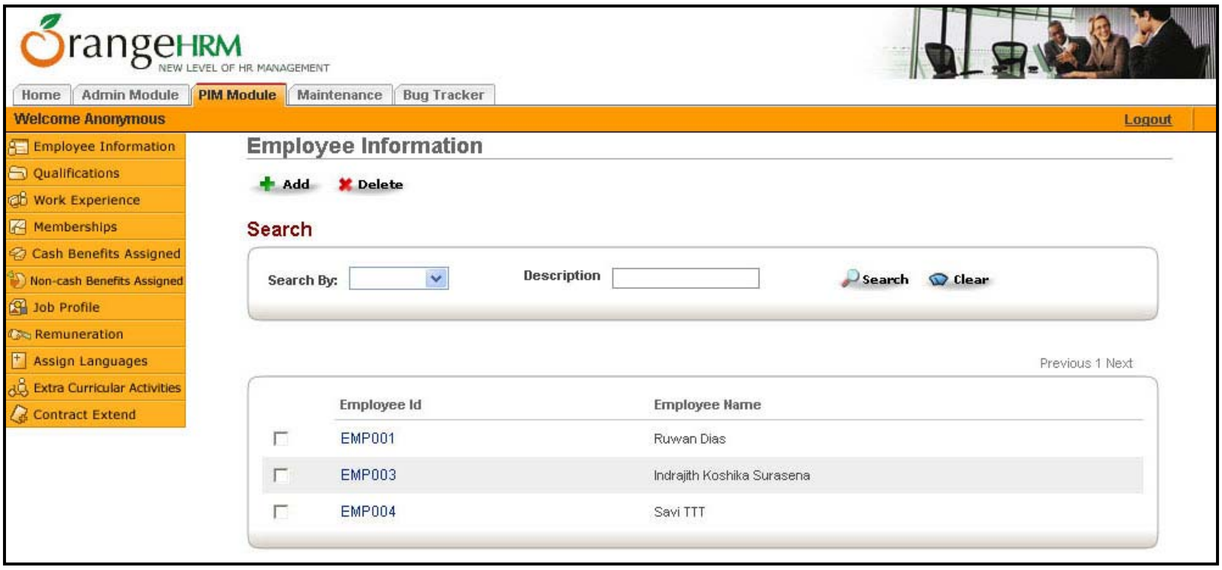

Figure 4.1

4.1 Employee Information

Details of employees are maintained in the system. Click on Employee Information in the menu to open this page shown in Figure 4.2.

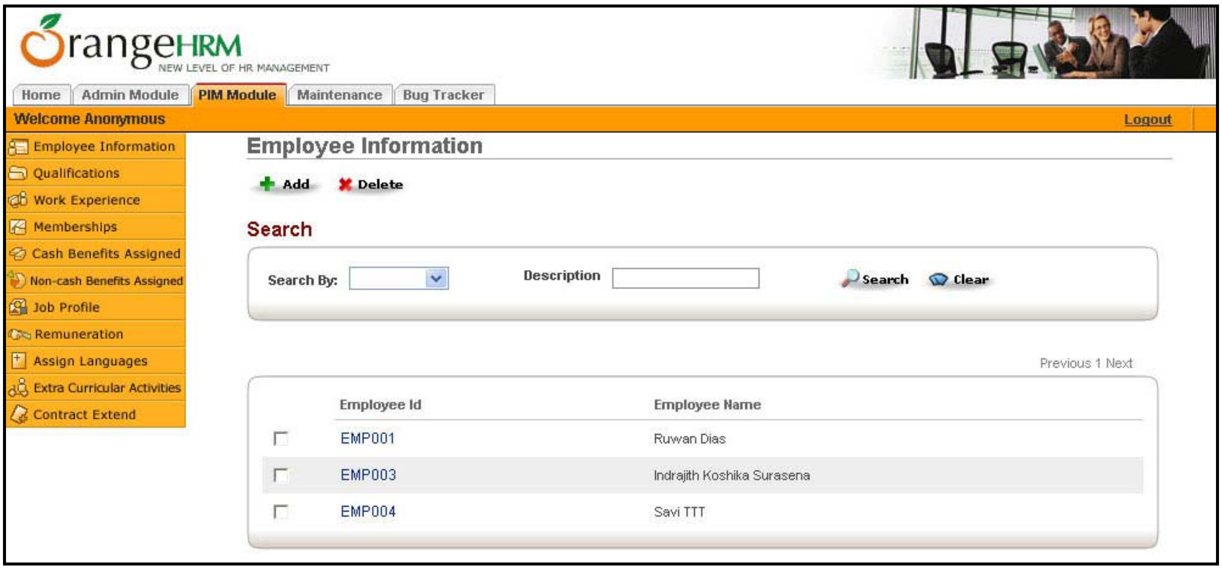

Figure 4.2

4.1.1 Add Employee to Employee Information

A new employee is added to the system using the Employee Information Page. Click on the **Add** button shown in Figure 4.2.

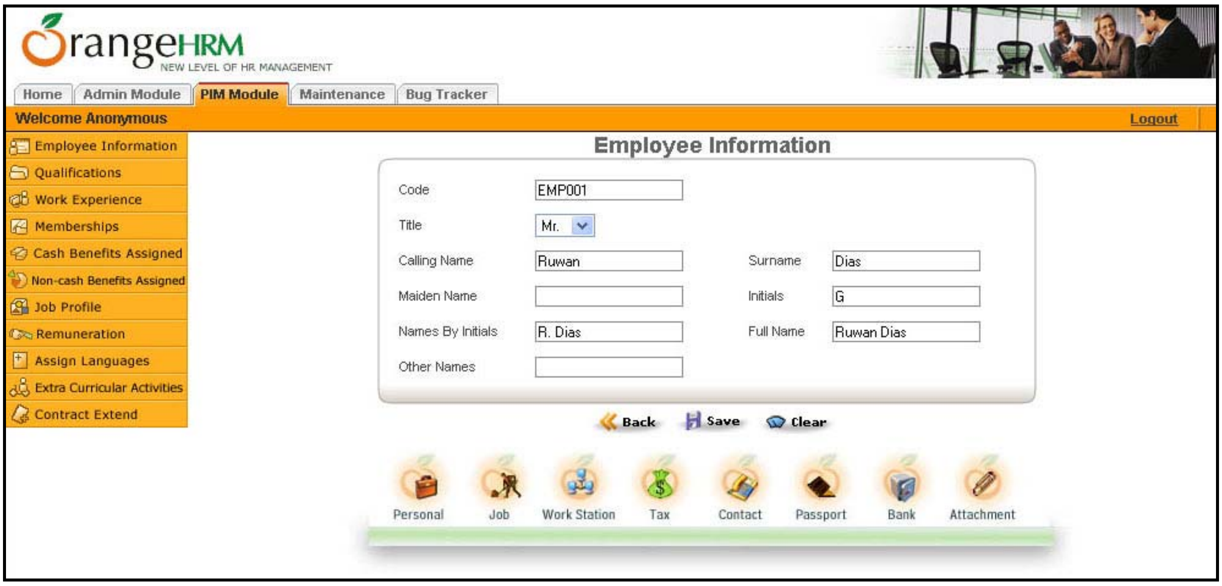

Figure 4.3

Once **Add** button is clicked the Employee Information page shown in Figure 4.3 is displayed. Enter details and click **Save** button.

1. Employee ID is automatically generated.
2. Select Title

3. Enter Calling name
4. Enter Maiden Name
5. Enter Names by Initial
6. Enter Other Names
7. Enter Surname
8. Enter Initials
9. Enter Full Name.

Note: The remaining details such as personal information, job information etc. can be entered by clicking on the relevant EmployeeID on the relevant pages. However, the particular employee should have been entered prior to entering such information.

4.1.1.1 Personal Information of Employee

Figure 4.4 shows personal information of relevant employees. Click on Personal icon on the Employee Information page to view this. Click on **Edit** button to add/edit entries and then click **Save** button.

1. Enter NIC No.
2. Enter Issued Date
3. Enter Date of Birth
4. Enter Place of Birth
5. Select Gender
6. Select Nationality
7. Select Religion
8. Select Blood Group
9. Select Marital Status
10. Enter Married Date if Marital Status is Married

Figure 4.4

4.1.1.2 Job Information of Employee

Figure 4.5 shows job information of relevant employee obtained by clicking on Job icon. Click on **Edit** button to add/edit entries and then click **Save** button.

1. Enter Date Joined
2. If Confirmed click on checkbox Confirmed
3. Enter date of resignation when resigning
4. Enter date of Retirement when retiring
5. Select Salary Grade
6. Select Corporate Title

7. Select Designation
8. Select Costing Centre
9. Enter Working Hours
10. Enter Job Preference
11. Select Employment Type
12. Select Statutory Classification
13. Select Employment Category
14. Enter Start Date
15. Enter End Date
16. When employee is made permanent click on checkbox Contract to Permanent.
17. Date of employee made permanent
18. Click on checkbox HR Active if needed
19. Click on checkbox Payroll Active if needed
20. Click on checkbox Time & Attendance if needed

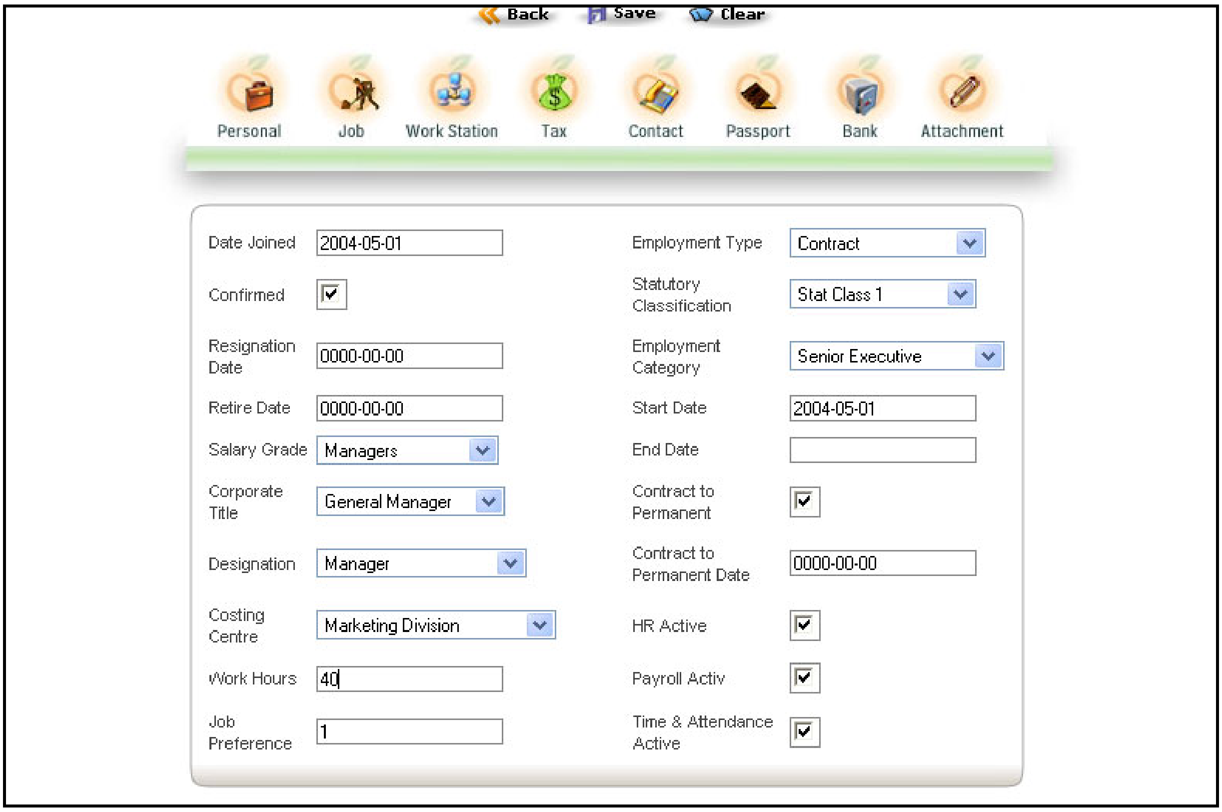

Figure 4.5

4.1.1.3 WorkStation Information

Figure 4.6 shows workstation information of relevant employee. Click on Work Station icon to view this page. Click on **Edit** button to add/edit entries and then click **Save** button.

1. Select Location
2. Select Group
3. Select Sector
4. Select Company
5. Select Division
6. Select Sub-Department

Figure 4.6

4.1.1.4 Tax Information

Tax details of each employee is entered to the system. Click on the icon to view this page, shown in Figure 4.7. The interface changes when Sri Lanka is selected as the country. See figure 4.8 for the screen if Sri Lanka is selected. Click on **Edit** button to add/edit entries and then click **Save** button.

- Selection of country except Sri Lanka

1. Select Country
2. Select type of tax
3. Select Federal or State option

If federal is selected

- ➢ Select filing status
- ➢ Enter allowances and Extra amounts

If state is selected then

- ➢ Select filing status
- ➢ Select taxed state
- ➢ Enter allowances and Extra amounts

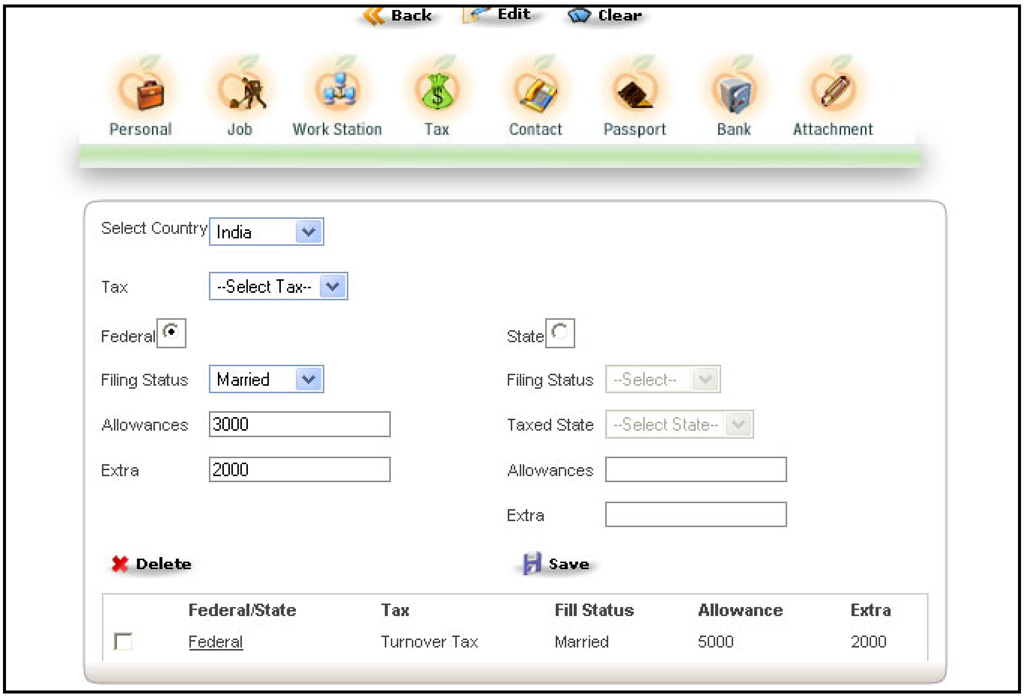

Figure 4.7

- Selection of Sri Lanka

1. Select Country
2. Select Tax Exempt
3. Check Tax on Tax if necessary

4. Enter Tax ID
5. If employee is eligible for EPF click on EPF Eligible
6. Enter EPF number
7. Select type of EPF fund by clicking on the appropriate option
8. Enter percentage paid by employee
9. Enter percentage paid by employer
10. If employee is eligible for ETF click on checkbox ETF Eligibility
11. Enter ETF number
12. Enter percentage paid by employee
13. Enter ETF date
14. If required select MSPS
    - Enter percentage of employee for MSPS
    - Enter percentage of employer for MSPS

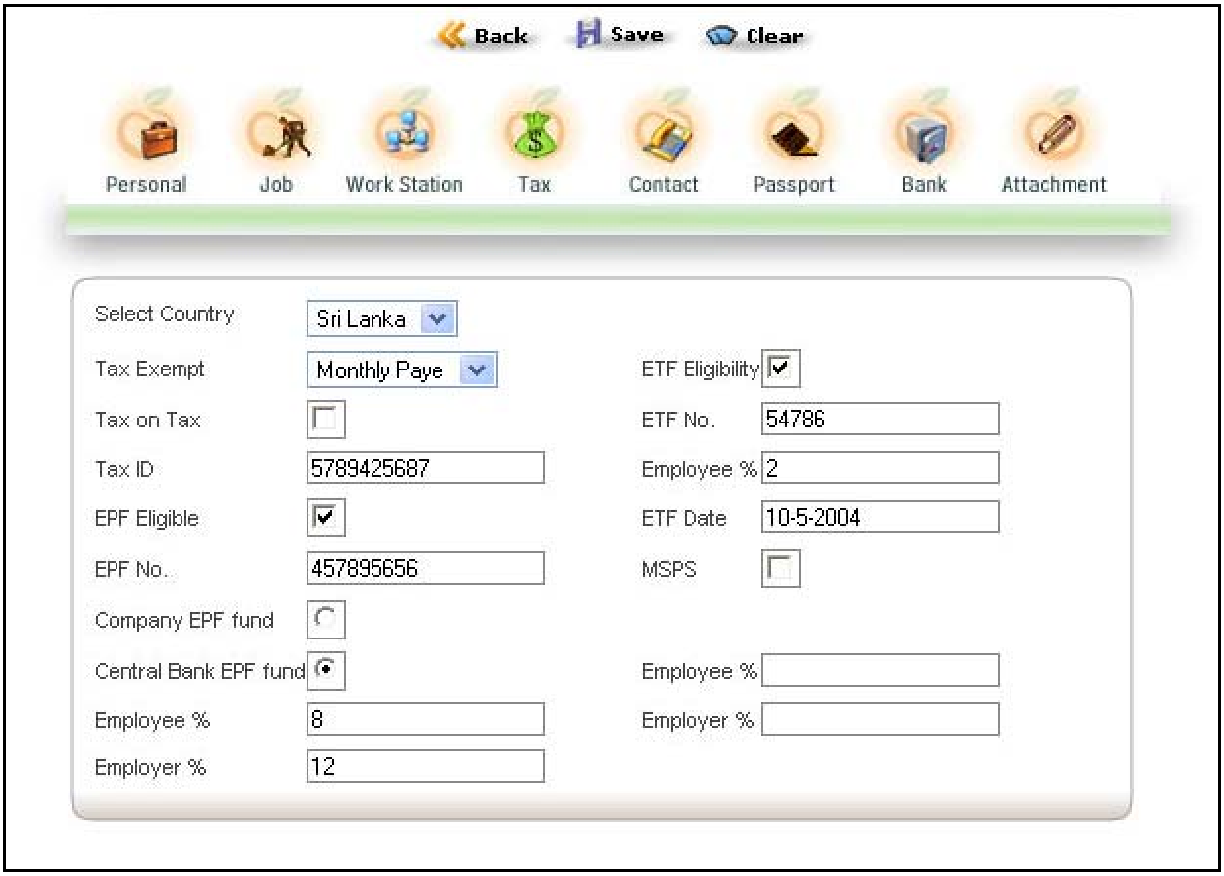

Figure 4.8

4.1.1.5 Contact Information

Contact details of an employee is entered to the system. Click on the Contacts icon to view this page shown in Figure 4.9. Click on **Edit** button to add/edit entries and then click **Save** button.

1. Enter House No.
2. Enter Street1
3. Enter Street2
4. Enter City/Town
5. Enter Postcode
6. Enter Mobile Number
7. Enter Fax Number
8. Enter Email Address
9. Select Country
10. Select Province
11. Select District
12. Select Electorate

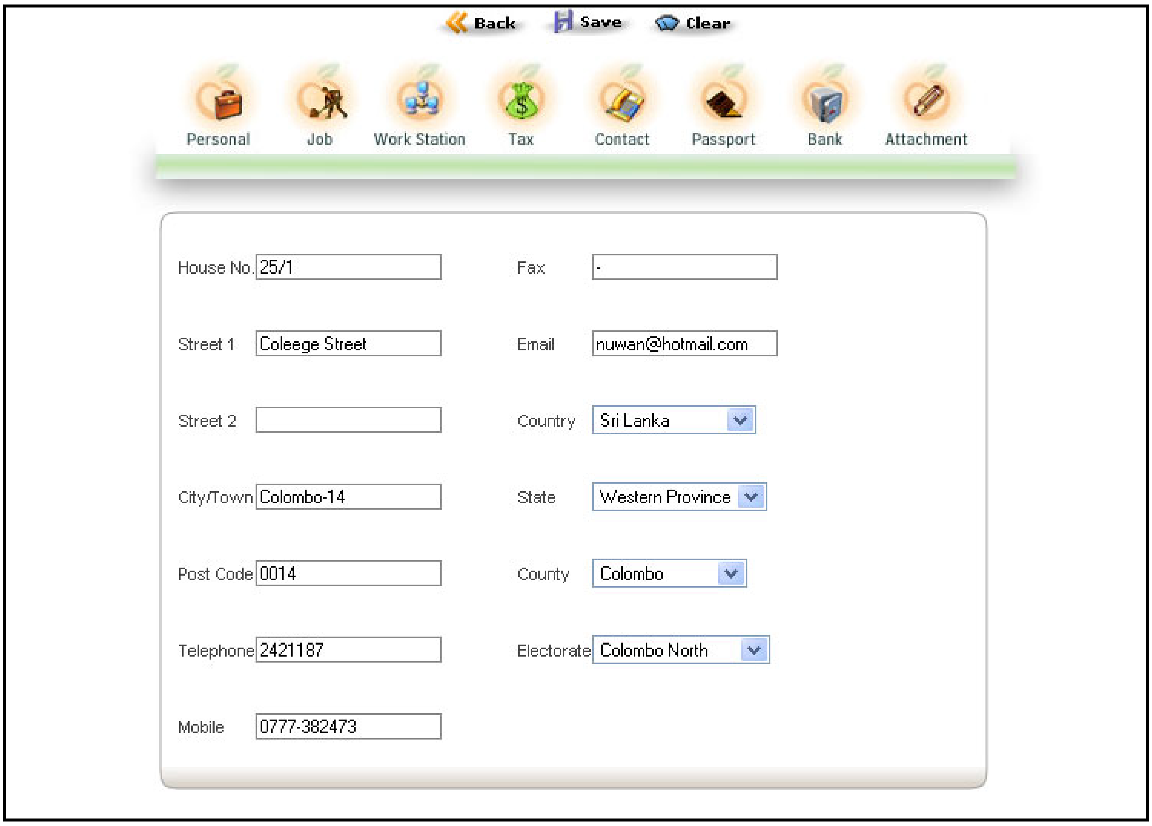

Figure 4.9

4.1.1.6 Passport Information

Passport/visa information of employees is maintained in the system. Click on the Passport icon to view this page, shown in Figure 4.10. Click on **Edit** button to add/edit entries and then click **Save** button.

1. Select the option of Passport or Visa
2. Enter Passport/Visa Number
3. Enter Passport/Visa type
4. Select Country
5. Enter No. of Entries
6. Enter Issued place
7. Enter Issued Date
8. Enter Date of Expiry
9. Enter Comments

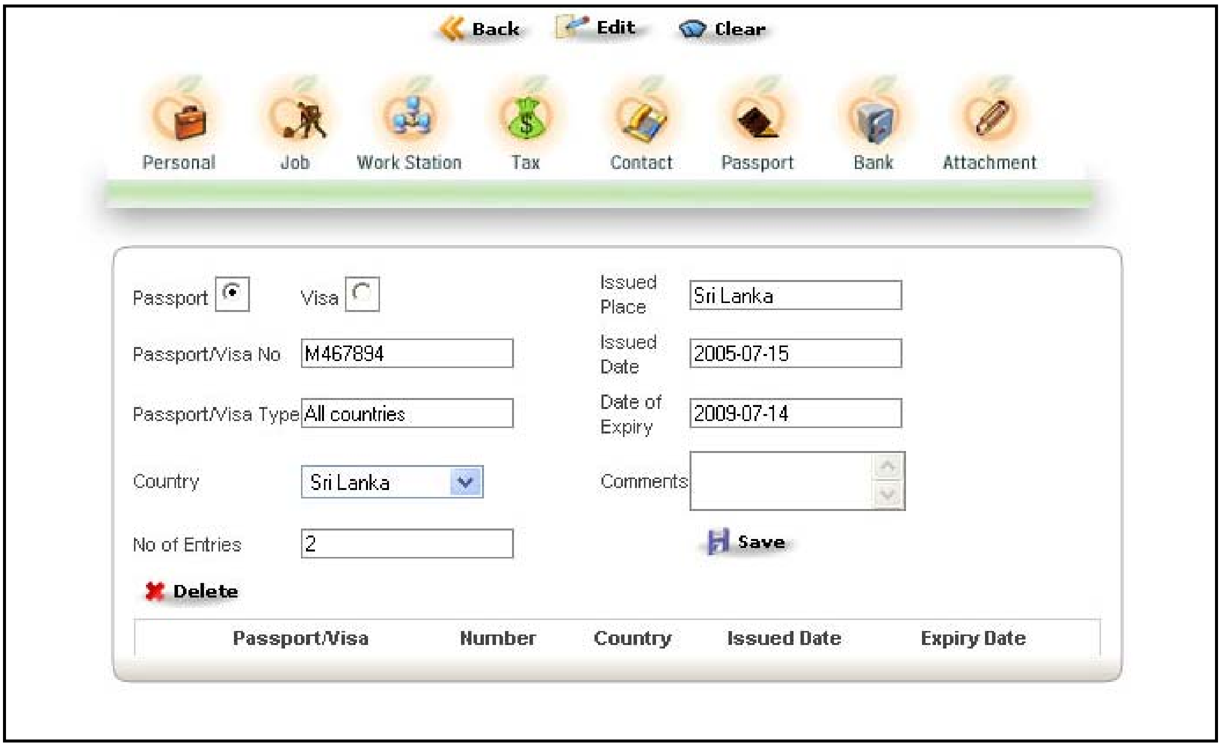

Figure 4.10

4.1.1.7 Bank Information

Bank information of the relevant employee is maintained in the system. Click on the Bank icon to view this page, shown in Figure 4.11. Click on **Edit** button to add/edit entries and then click **Save** button. Click on the branch link to edit details for branches.

1. Select Bank Name
2. Select Branch Name
3. Enter Account Number
4. Account Type
5. Enter Amount
6. Select option Current or Savings for Account Type

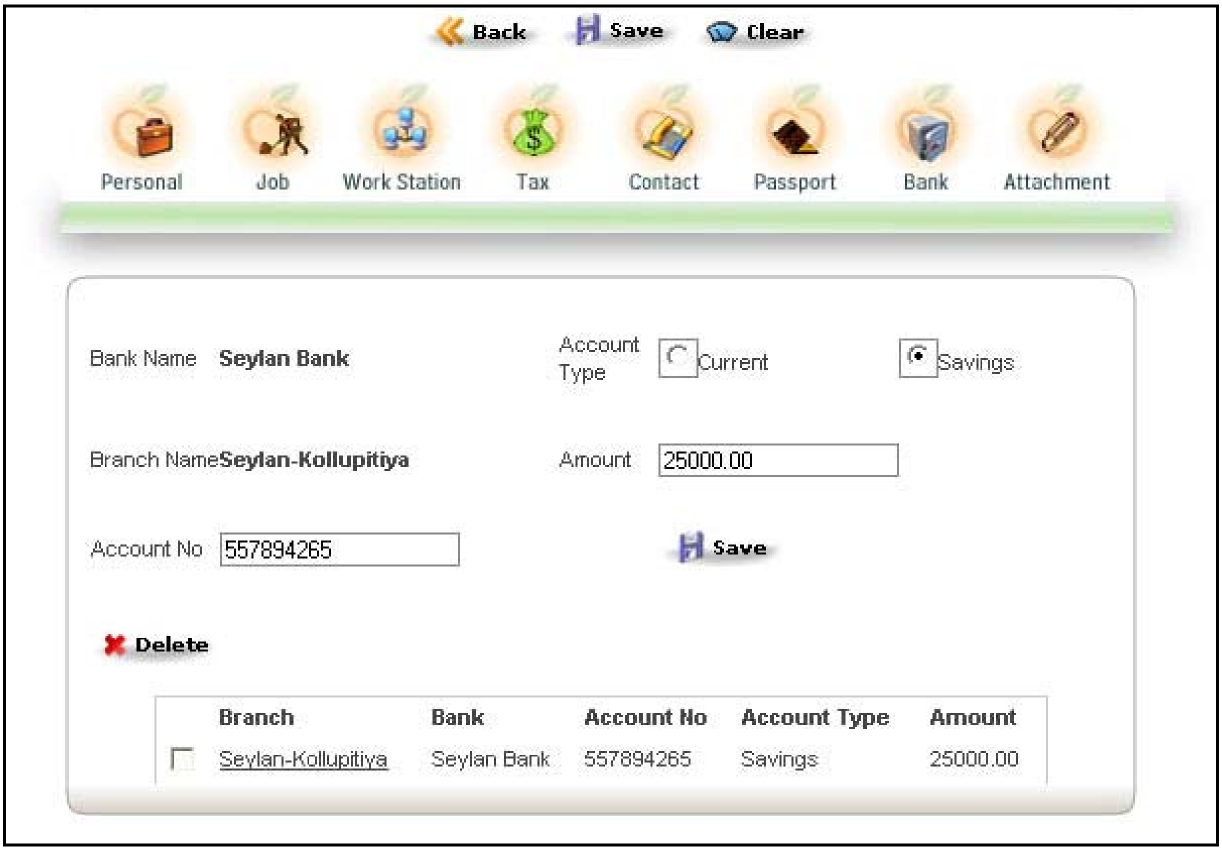

Figure 4.11

4.1.1.8 Attachment.

Click on the Attachment icon to attach a document related to the employee. The following page will be displayed. Click on Browse and select the file. You may enter a description for it. Click on **Save** button.

Figure 4.12

4.1.2 Delete Employee from Employee Information

This would enable the user to remove an employee from the employee information. Click on the checkbox against the employee ID to be deleted and click **Delete** button. Multiple employees could be deleted simultaneously.

4.1.3 Adding an Employee

1. Open the relevant page such as for example, qualifications. Click on the **Add** button.
2. A page is shown listing all the employees who have not been included. Click on the Employee ID of the employee to be included.

4.2 Qualifications

The details of the various qualifications of an employee is entered to the system. Click on Qualifications in the menu to open this page. See Figure 4.13. Click on **Add** button to add an employee who has not been assigned with a qualification previously.

NOTE: Refer Section 4.1.3 to add an employee.

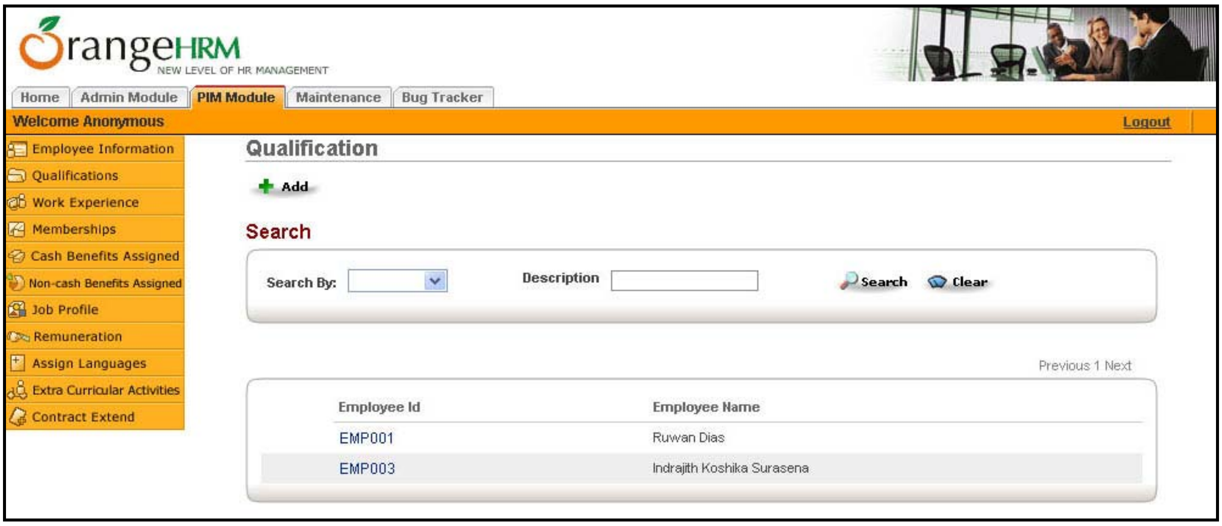

Figure 4.13

A search can be done based on Employee ID or Employee Name. Refer section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of qualification. Click on the **Previous** link to move to the previous page of qualification.

4.2.1 Add Qualification to Employee

Click on the Employee ID of the relevant employee to add qualification. The page used to assign qualifications to employees in shown in Figure 4.14.

1. Select Qualification Type
2. Select Qualification
3. Enter Institute

4. Select Status

5. Enter Comments

Click on **Save** button. The saved entry will be displayed in the Assigned Qualifications Area.

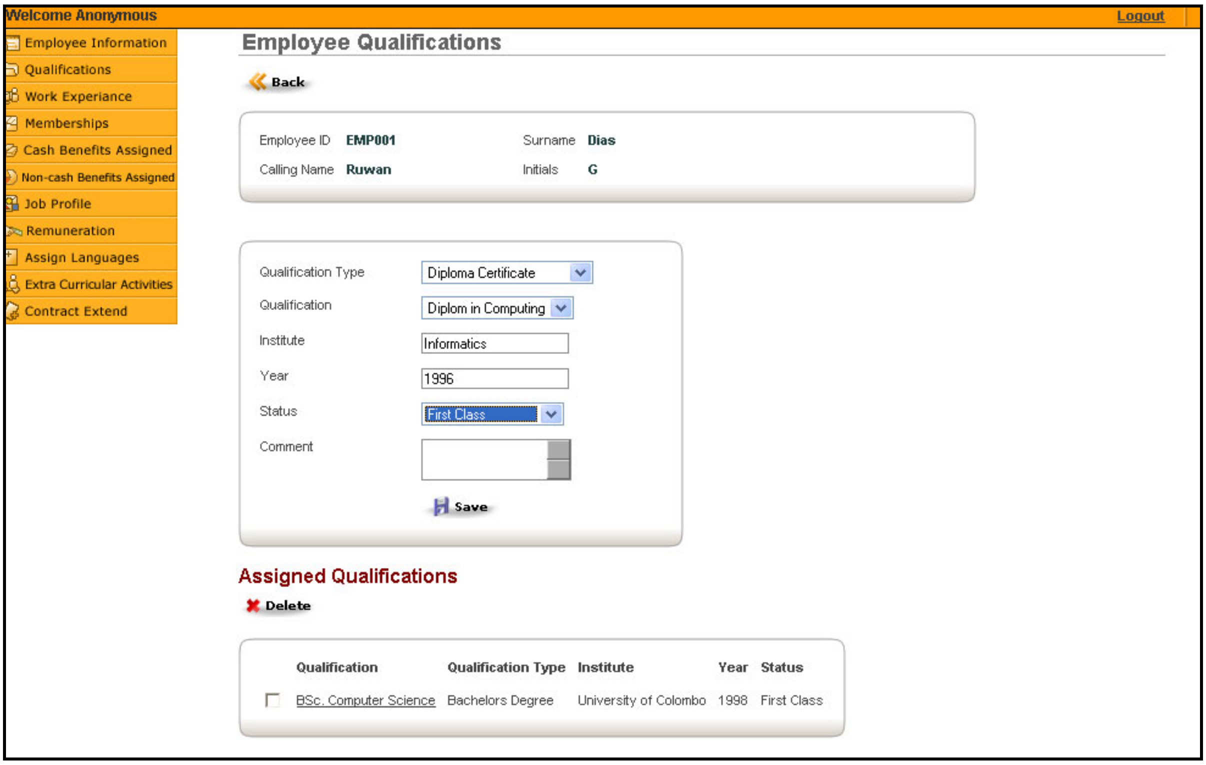

Figure 4.14

4.2.2 Edit Qualification Assigned to Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Qualifications' section click on the Qualification that is to be edited.
3. Click on **Edit** button, make the necessary changes and then click **Save** button.

4.2.3 Delete Qualification of Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Qualifications' section click on the checkbox against the qualification to be deleted and click **Delete** button.

4.3 Employee Work Experience

The work experience of an employee is entered to the system. Click on Work Experience in the menu to open this page. See Figure 4.15. Click on **Add** button to add an employee who has not been assigned with work experience previously.

NOTE: Refer section 4.1.2 to add an employee.

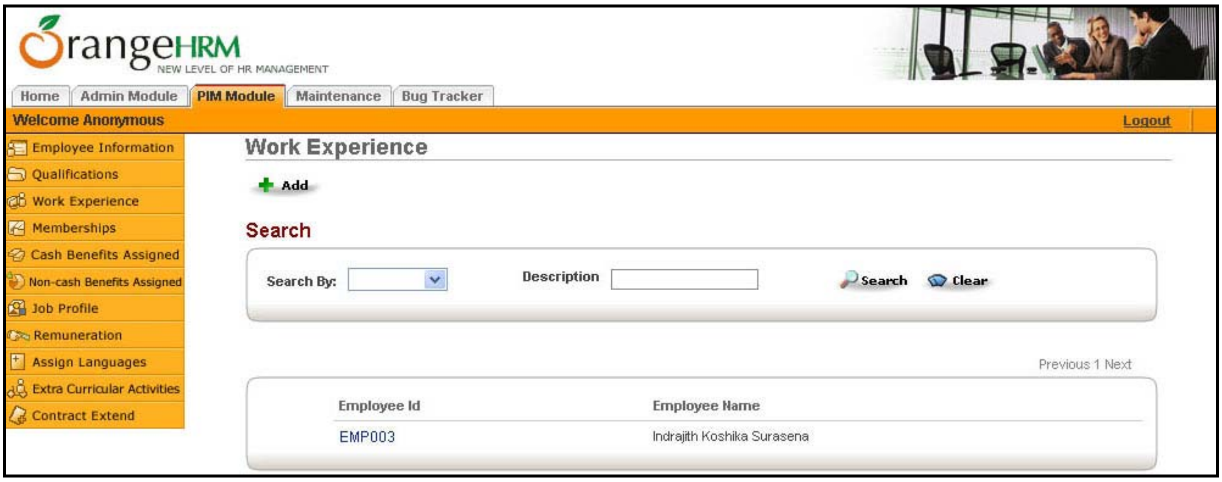

Figure 4.15

A search can be done based on Employee ID or Employee Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of Work Experience. Click on the **Previous** link to move to the previous page of Work Experience.

4.3.1 Add Work Experience for Employee

Click on the Employee ID of the relevant employee to add experience. This page is shown in Figure 4.16.

1. Enter Company
2. Enter Designation of Leave
3. If work related click on checkbox Work Related
4. Enter Address
5. Select Country

6. Select State
7. Enter Reason for Leaving
8. Enter From Date of Employment
9. Enter To Date of Employment
10. Enter number of years of employment
11. Enter number of months of employment
12. Enter Accountabilities
13. Enter Contact Person
14. Telephone
15. Enter Achievements
16. Enter Email

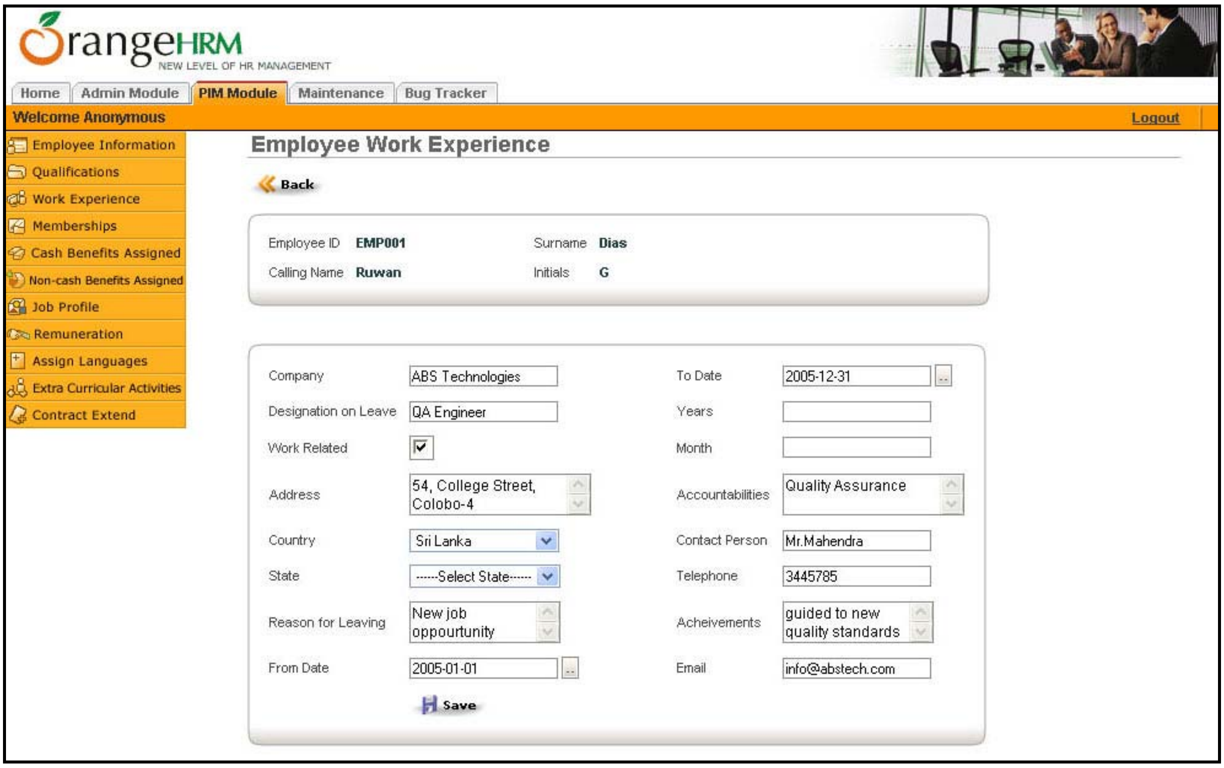

Figure 4.16

4.3.2 Edit Assigned Work Experience for Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Work Experience' section click on the Work Experience that is to be edited.
3. Click on **Edit** button, make the necessary changes and then click **Save** button.

4.3.3 Delete Assigned Work Experience for Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Work Experience' area, click on the checkbox against the Work Experience to be deleted and click **Delete** button.

4.4 Memberships

The details of the various memberships of an employee is entered to the system. Click on Memberships in the menu to open this page. See Figure 4.17. Click on **Add** button to add an employee who has not been assigned with a membership previously.

NOTE: Refer section 4.1.3 to add an employee.

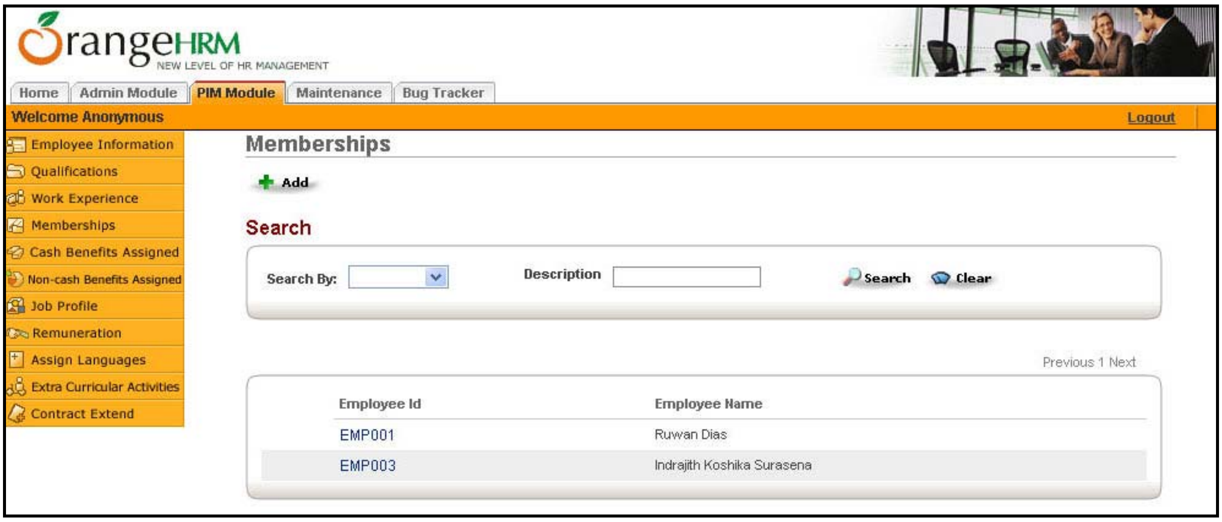

Figure 4.17

A search can be done based on Employee ID or Employee Name. Refer section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page of memberships. Click on the **Previous** link to move to the previous page of memberships.

4.4.1 Add Membership for Employee

Click on the Employee ID of the relevant employee to add membership. See Figure 4.18.

1. Select Membership Type
2. Select Membership
3. Select Subscription Ownership
4. Enter Subscription Amount
5. Enter Subscription Commence Date
6. Enter Subscription Renewal Date

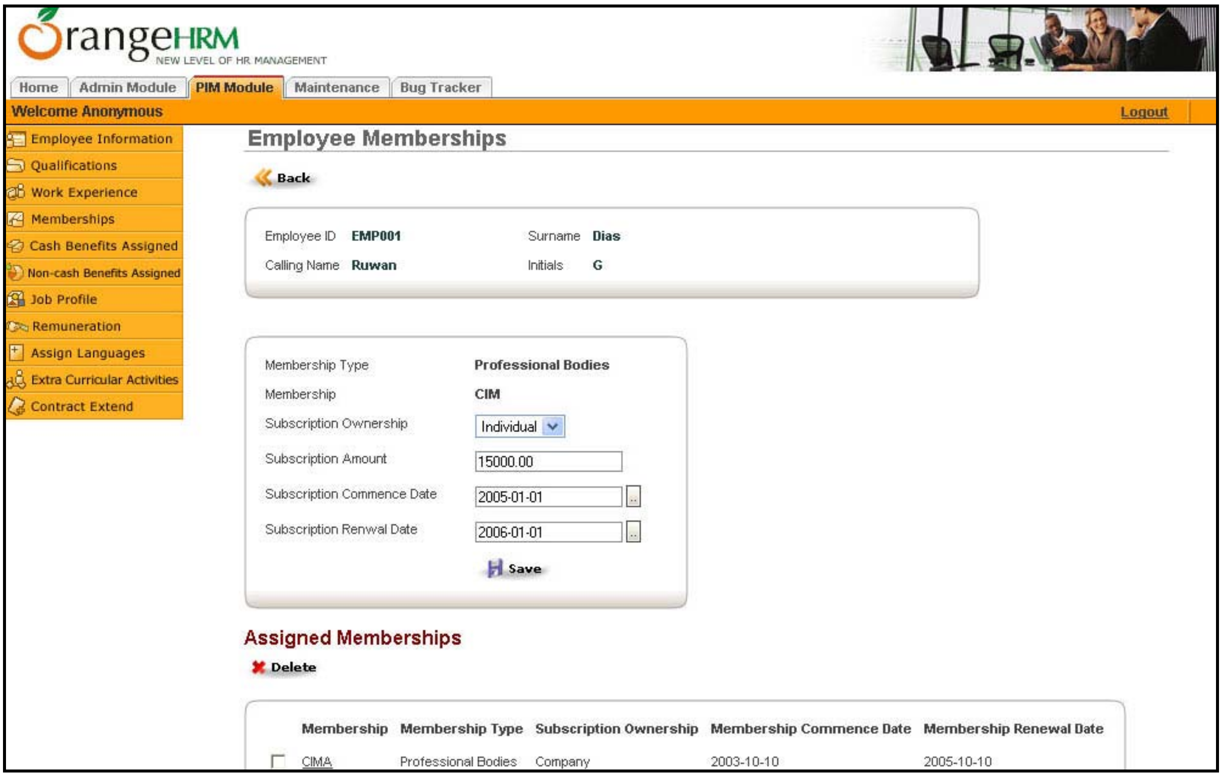

Figure 4.18

4.4.2 Edit Assigned Memberships of Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Memberships' section click on the Memberships that is to be edited. See Figure 4.19.
3. Click on **Edit** button, make the necessary changes and then click **Save** button.

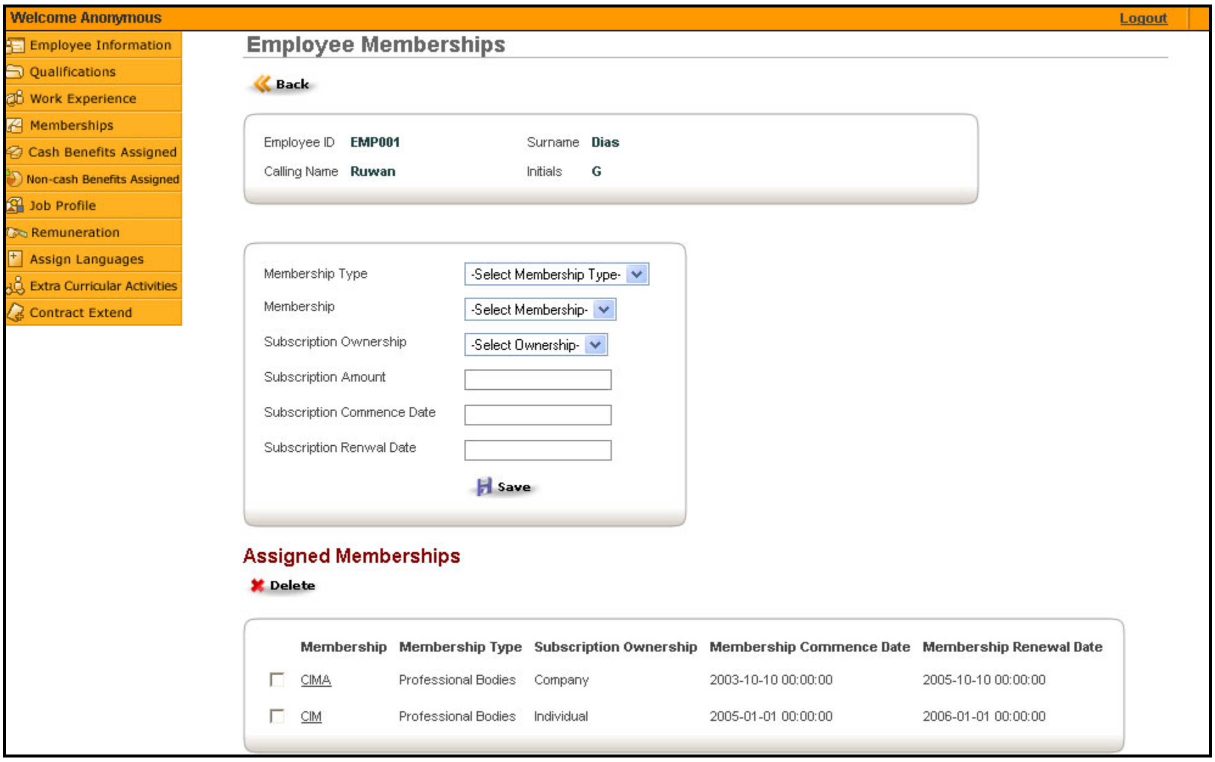

Figure 4.19

4.4.3 Delete Assigned Memberships of Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Memberships' area, click on the checkbox against the Memberships to be deleted and click **Delete** button.

4.5 Cash Benefits Assigned

The details of the different cash benefits that an employee is entitled to, will be entered to the system. To open this page, click on Cash Benefits Assigned in the menu. See Figure 4.20. Click on **Add** button to add an employee who has not been assigned with cash benefits previously.

NOTE: Refer section 4.1.3 to add an employee.

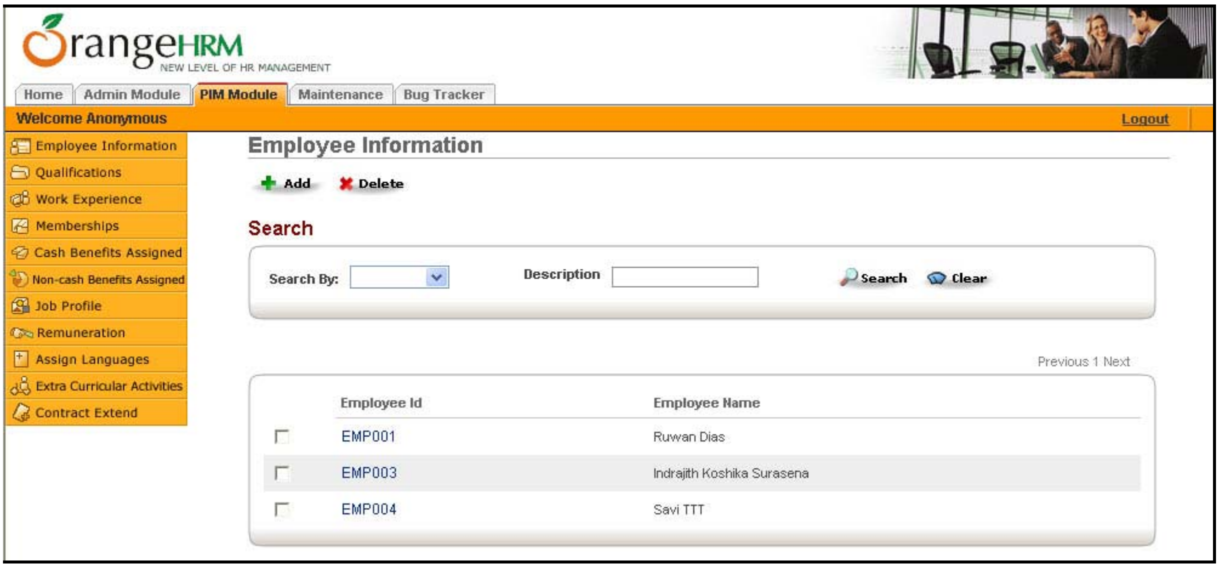

Figure 4.20

A search can be done based on Employee ID or Employee Name. Refer section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page. Click on the **Previous** link to move to the previous page.

4.5.1 Assign Cash Benefit to Employee

1. Click on the Employee ID of the relevant employee to add Cash Benefit.
2. In the 'Unassigned Benefits' area click on the checkbox against the benefit that is to be assigned. See Figure 4.21. Click on **Add** button. The benefit is now added to Assigned Benefits.

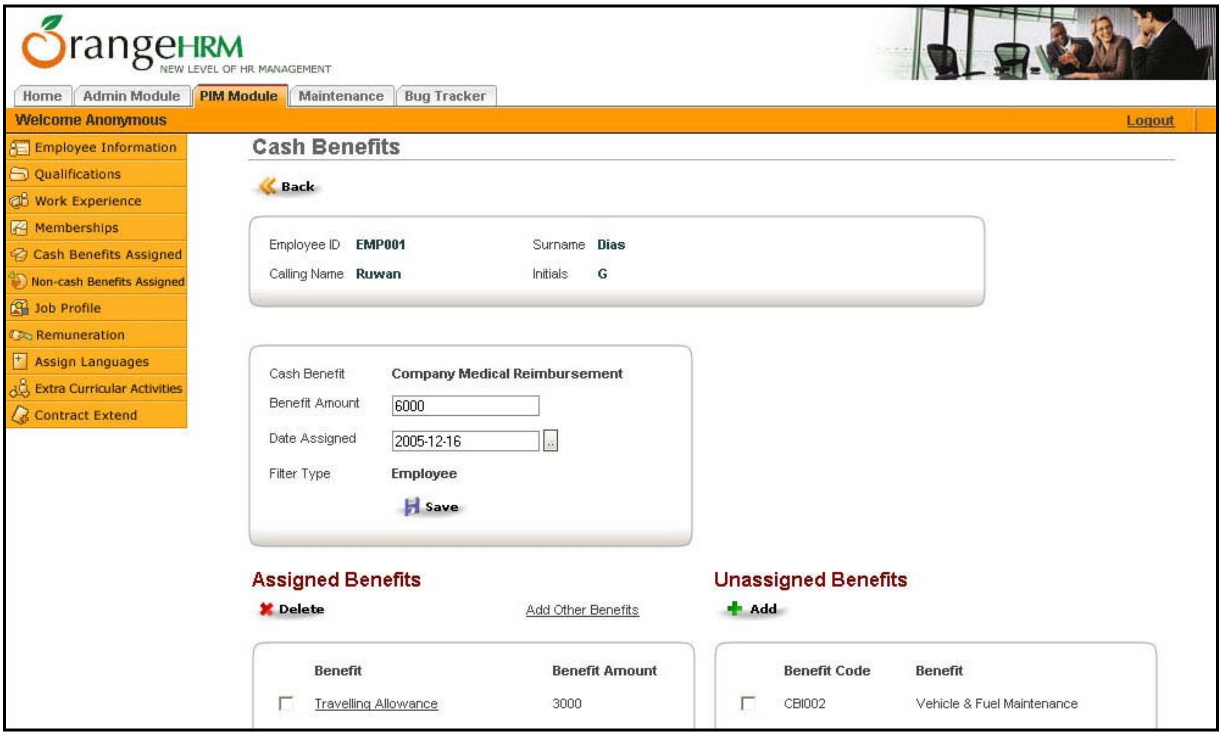

Figure 4.21

4.5.2 Edit Assigned Benefit of Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Benefit' area click on the Benefit that is to be edited. See Figure 4.22.
3. Click on **Edit** button, make the necessary changes and then click **Save** button.

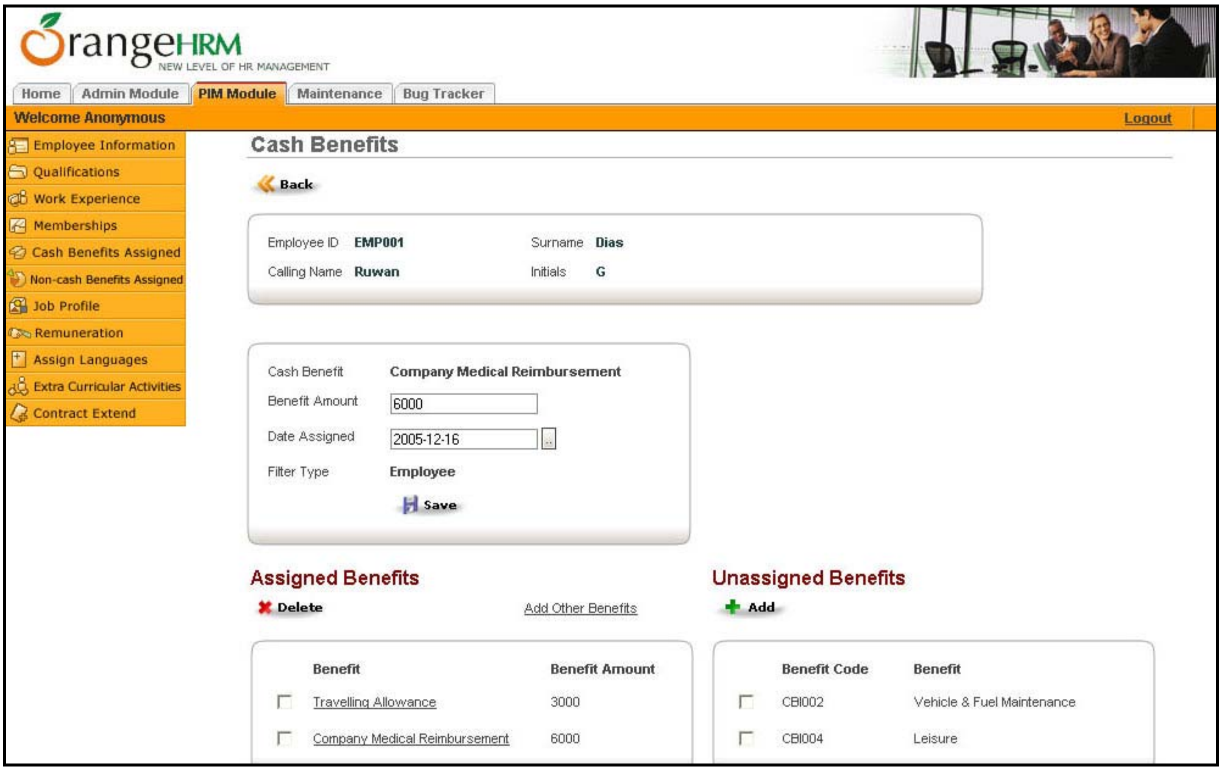

Figure 4.22

4.5.3 Delete Assigned Benefit of Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Benefit' area, click on the checkbox against the Benefit that is to be deleted and click **Delete** button.

4.6 Non-Cash Benefits Assigned

The details of the different non-cash benefits that an employee is entitled to, will be entered to the system. To open this page, click on Non-Cash Benefits Assigned in the menu. See Figure 4.23. Click on **Add** button to add an employee who has not been assigned with non-cash benefits previously.

NOTE: Refer section to add an employee.

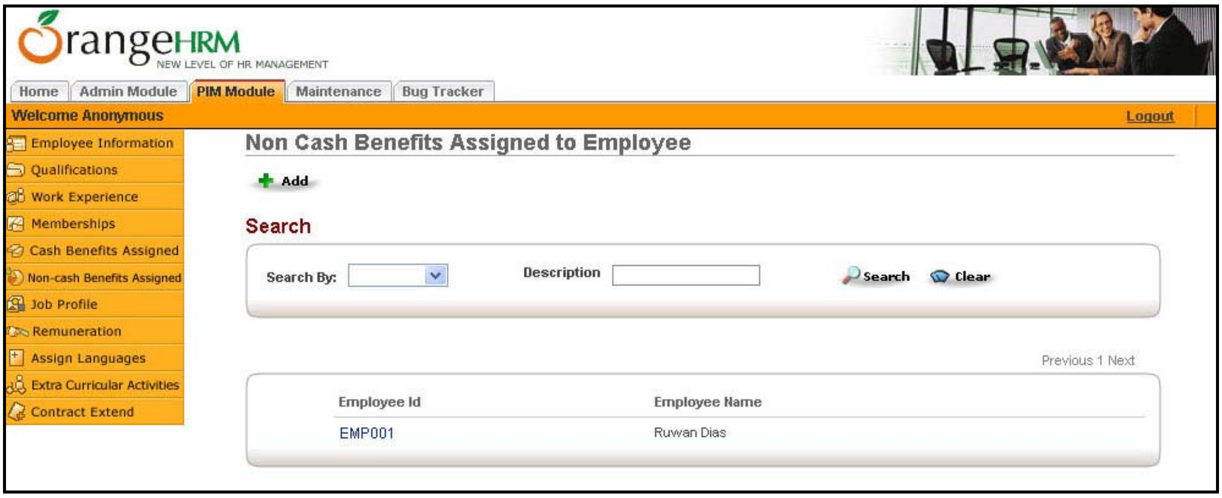

Figure 4.23

A search can be done based on Employee ID or Employee Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page. Click on the **Previous** link to move to the previous page.

4.6.1 Assign Non-Cash Benefit to Employee

1. Click on the Employee ID of the relevant employee to add Non-Cash Benefit.
2. In the 'Unassigned Benefits' area click on the checkbox against the benefit that is to be assigned. See Figure 4.24. Click on **Add** button. The benefit is now added to Assigned Benefits.

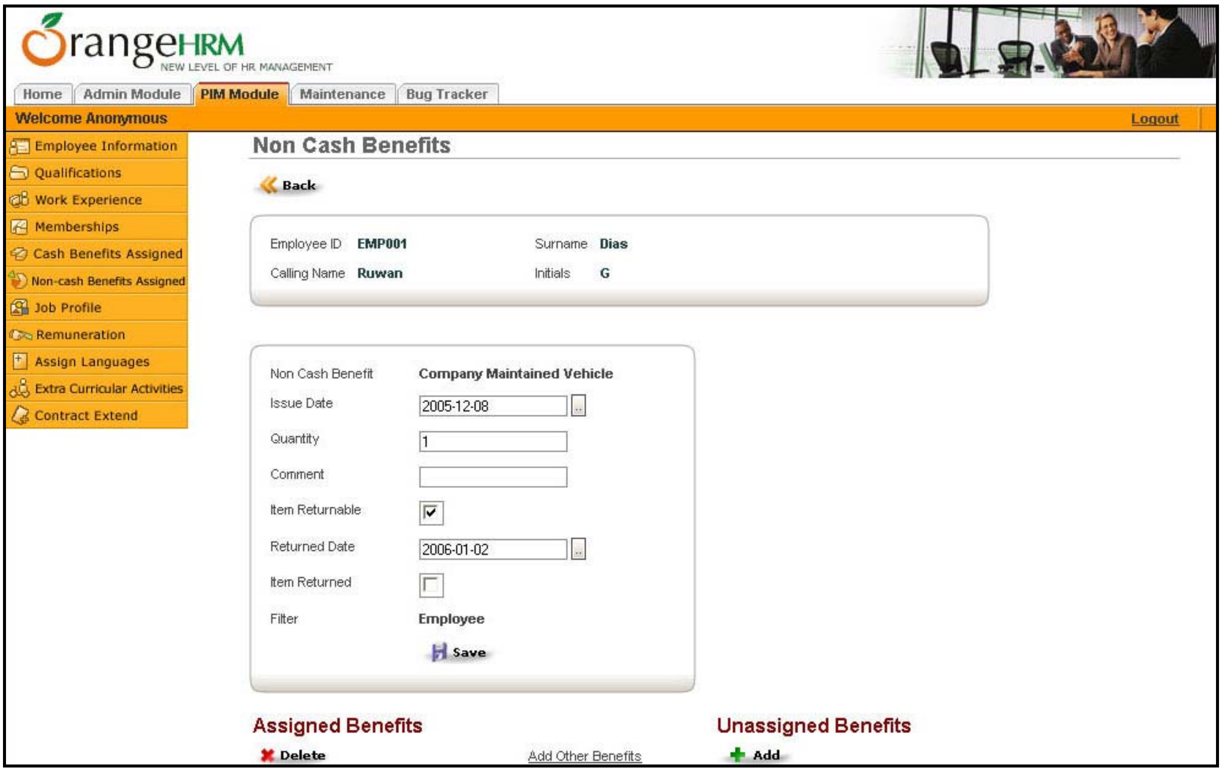

Figure 4.24

4.6.2 Edit Assigned Non-Cash Benefit of Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Benefit' area click on the Benefit that is to be edited. See Figure 4.25.
3. Click on **Edit** button, make the necessary changes and then click **Save** button.

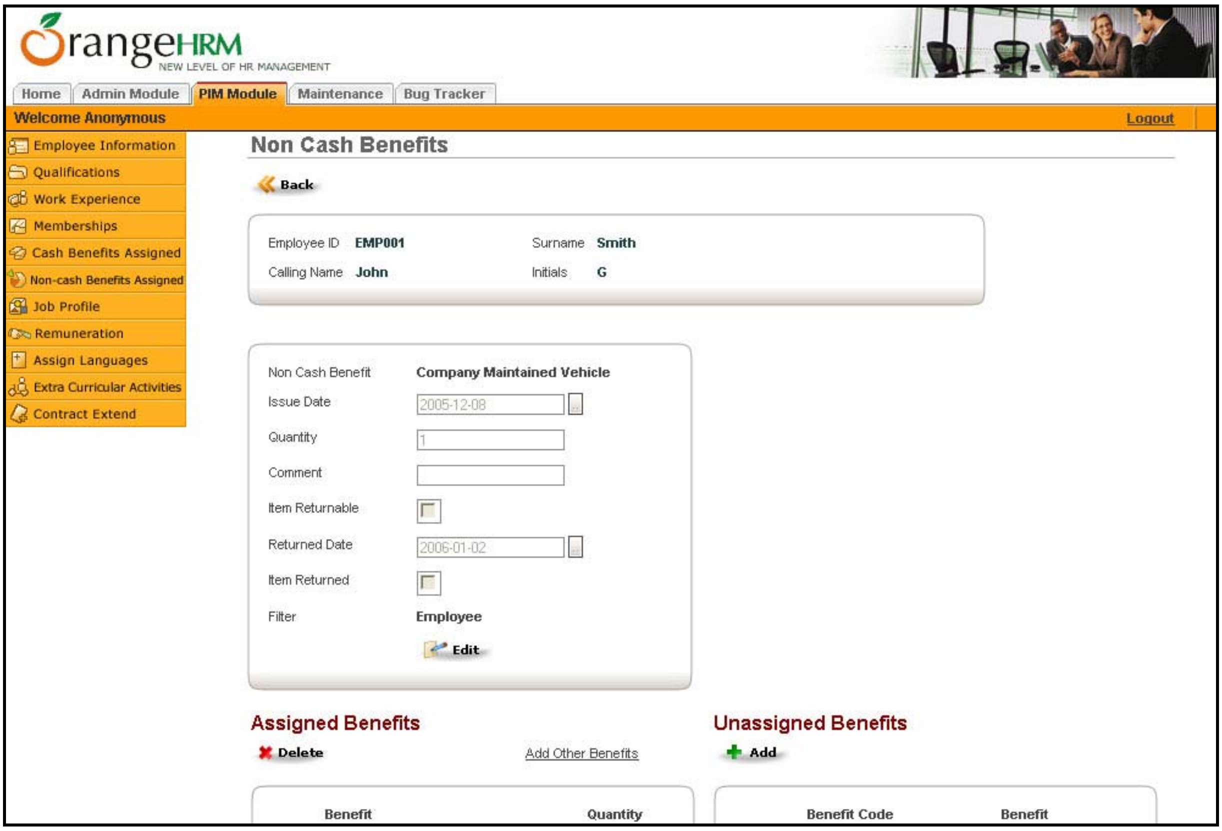

Figure 4.25

4.6.3 Delete Assigned Non-Cash Benefit of Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Benefit' area, click on the checkbox against the Non-Cash Benefit that is to be deleted and click **Delete** button.
3. Click on the Benefits to be deleted and click **Delete** button.

4.7 Employee Job Specification

The job specification for each employee is entered to the system. To open this page, click on Job Profile in the menu. See Figure 4.26. Click on **Add** button to add an employee who has not been assigned with a job description previously.

NOTE: Refer section 4.1.3 to add an employee.

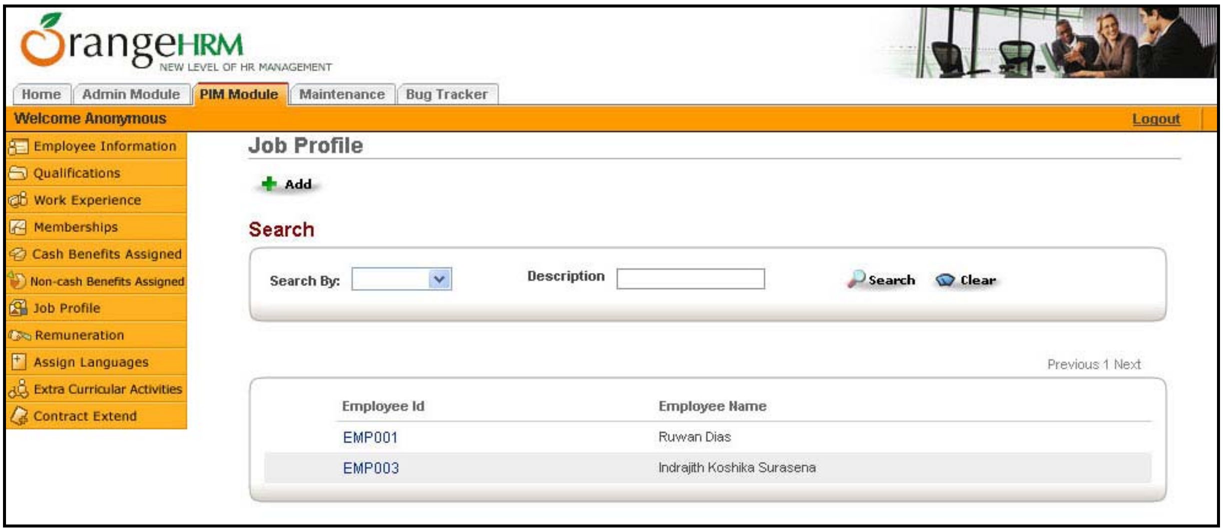

Figure 4.26

A search can be done based on Employee ID or Employee Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page. Click on the **Previous** link to move to the previous page.

4.7.1 Add Assigned Job specification of Employee

1. Select Category
2. Enter Description

Click on **Save** button. The saved entry would be included to the Assigned Job Specifications. See Figure 4.27 for Job Specification page.

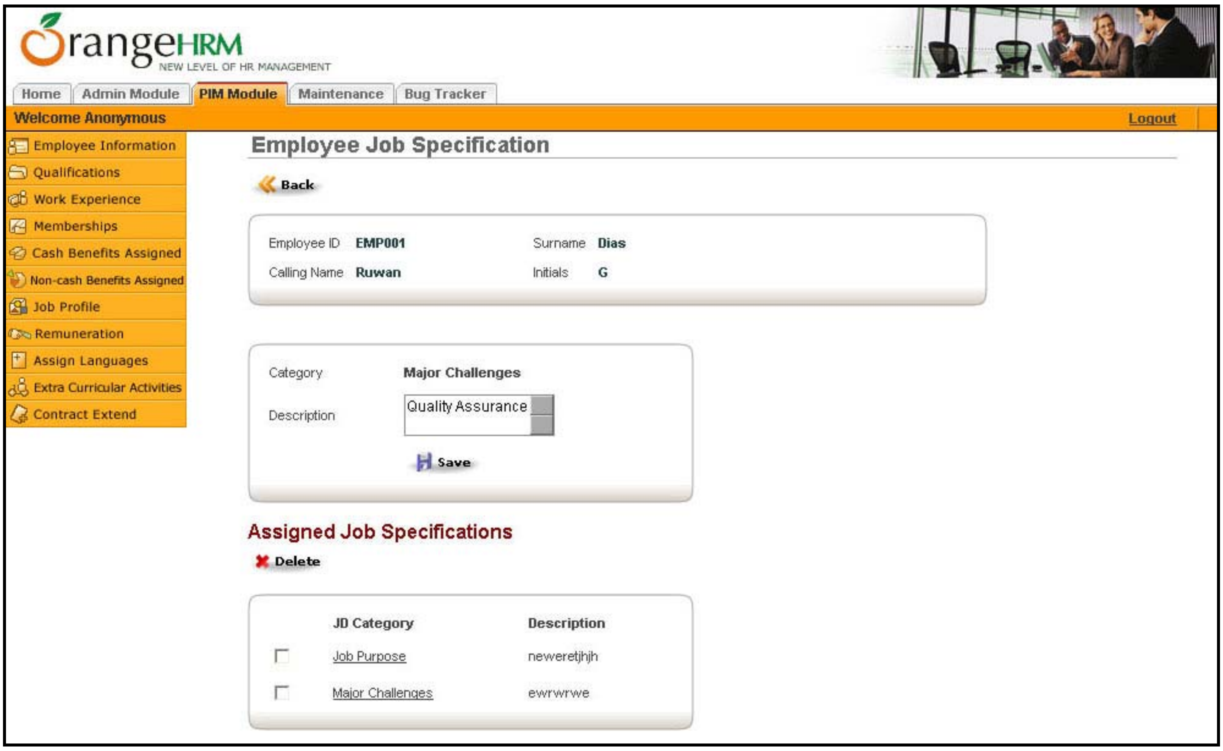

Figure 4.27

4.7.2 Edit Assigned Job specification of Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Job Specification' area click on the JD Category that is to be edited. See Figure 4.28.
3. Click on **Edit** button, make the necessary changes and then click **Save** button.

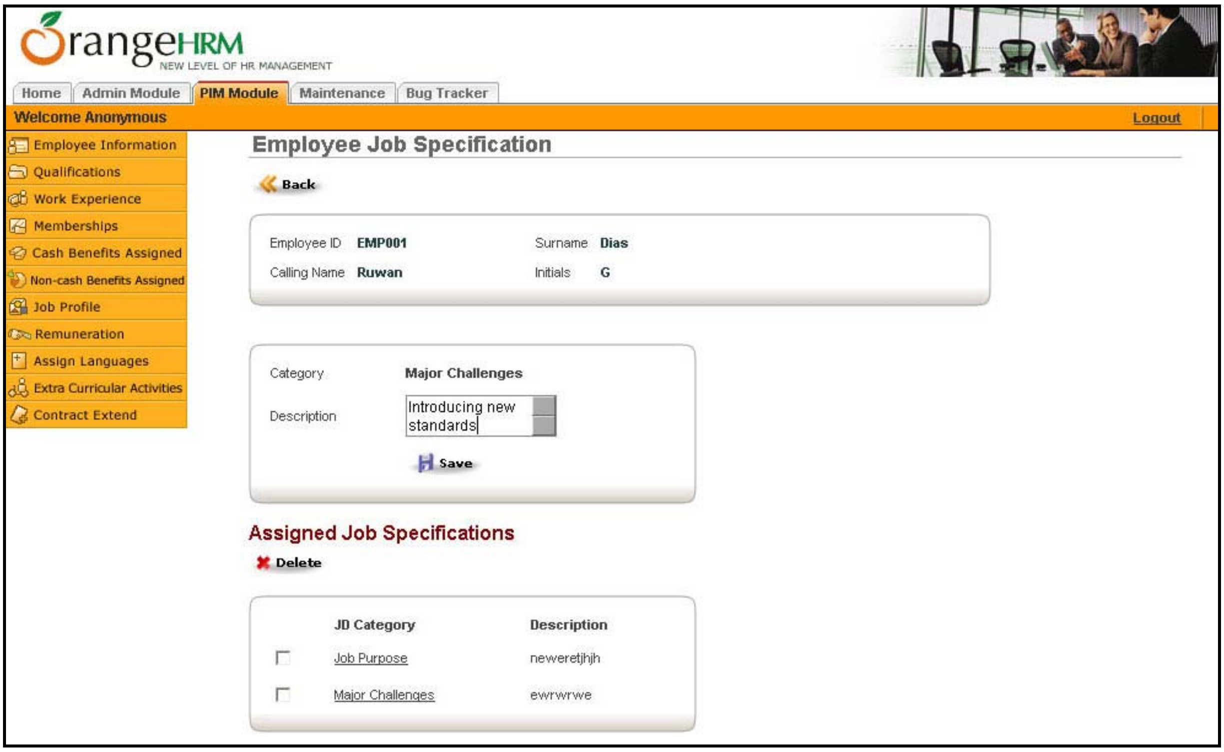

Figure 4.28

4.7.3 Delete Assigned Job Specification

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Job-Specification' area, click on the checkbox against the Job Specification that is to be deleted and click **Delete** button.

4.8 Remuneration

Salary details of each employee is maintained. To open this page, click on Remuneration in the menu. See Figure 4.29. Click on **Add** button to add an employee who has not been assigned with remuneration previously.

NOTE: Refer section 4.1.3 to add an employee.

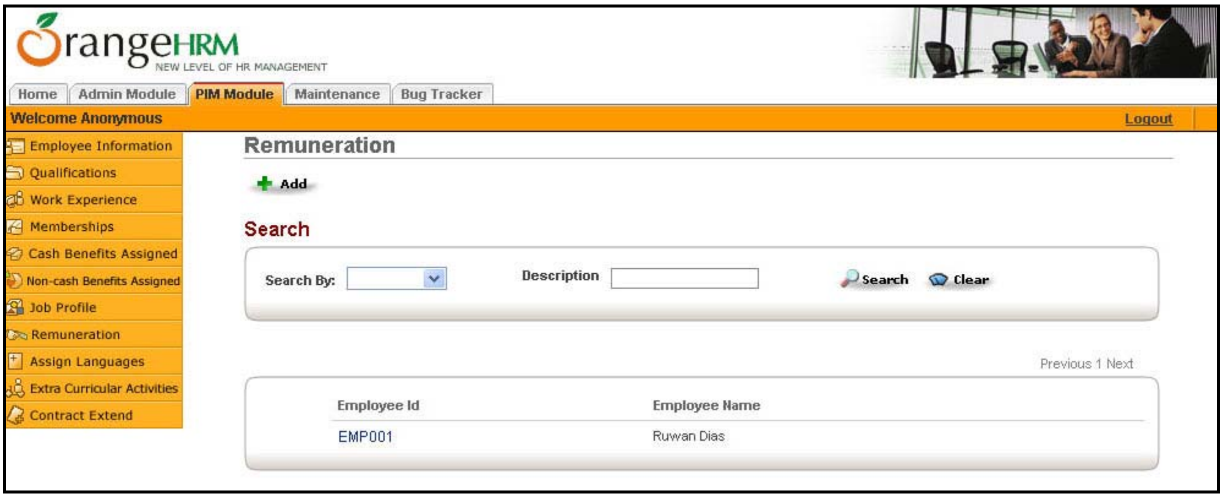

Figure 4.29

A search can be done based on Employee ID or Employee Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page. Click on the **Previous** link to move to the previous page.

4.8.1 Assign Salary to Employee

Click on the Employee ID of the relevant employee to assign salary. See Figure 4.30.

1. Salary Grade is auto-generated
2. Select Currency
3. Min-point is auto-generated
4. Max-point is auto-generated
5. Enter basic salary

Click on the **Save** button. The entry is added to the Assigned Salaries.

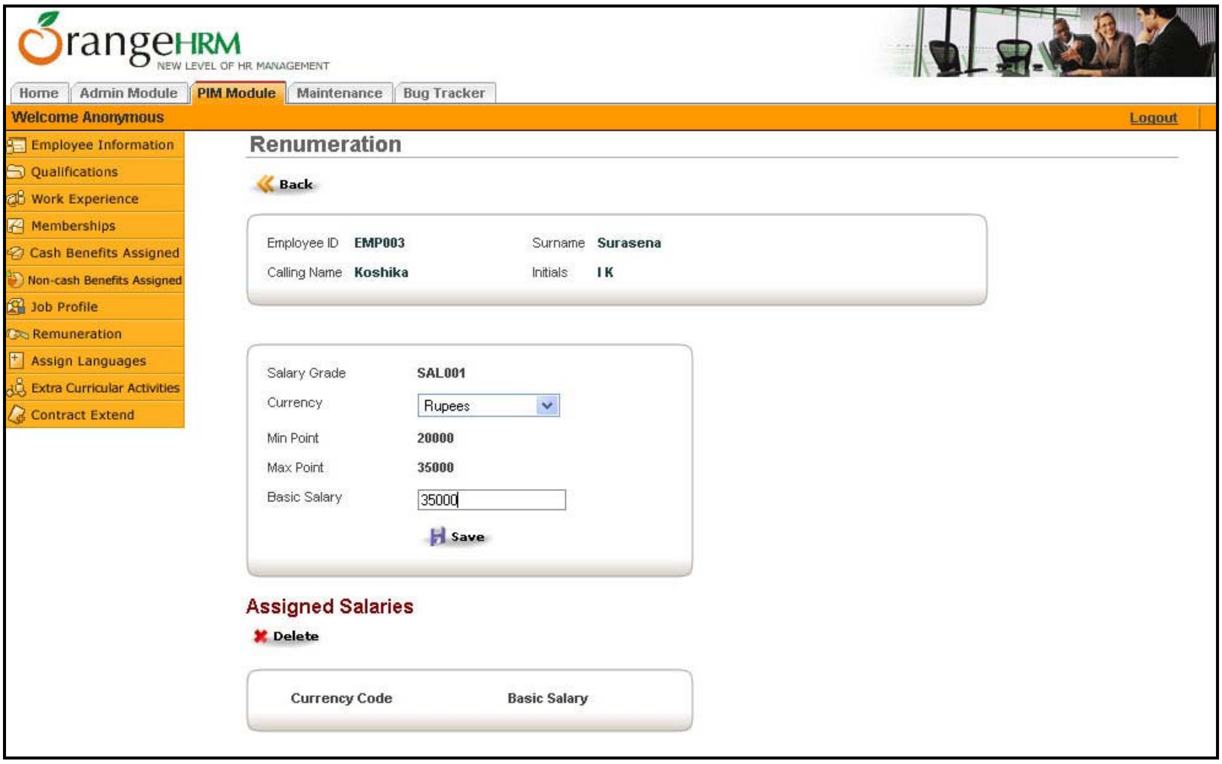

Figure 4.30

4.8.2 Edit Assigned Salary of Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Salaries' area click on that is to be edited. See Figure 4.31.
3. Click on **Edit** button, make the necessary changes to Basic Salary and then click **Save** button.

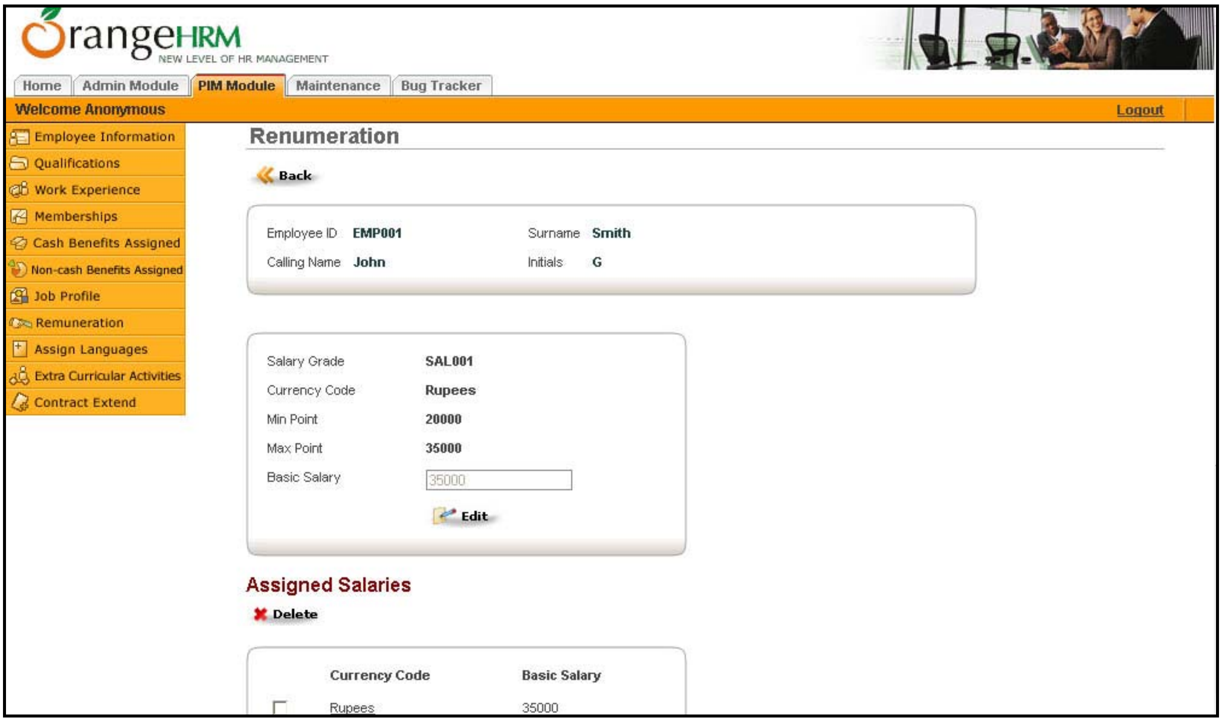

Figure 4.31

4.8.3 Delete Assigned Salary of employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Salaries' area, click on the checkbox against the salary that is to be deleted and click **Delete** button.

4.9 Assign Languages

The language skills of each employee is maintained in the system. To open this page, click on Assign Languages in the menu. See Figure 4.32. Click on **Add** button to add an employee who has not been assigned with a language skill previously.

NOTE: Refer section 4.1.3 to add an employee.

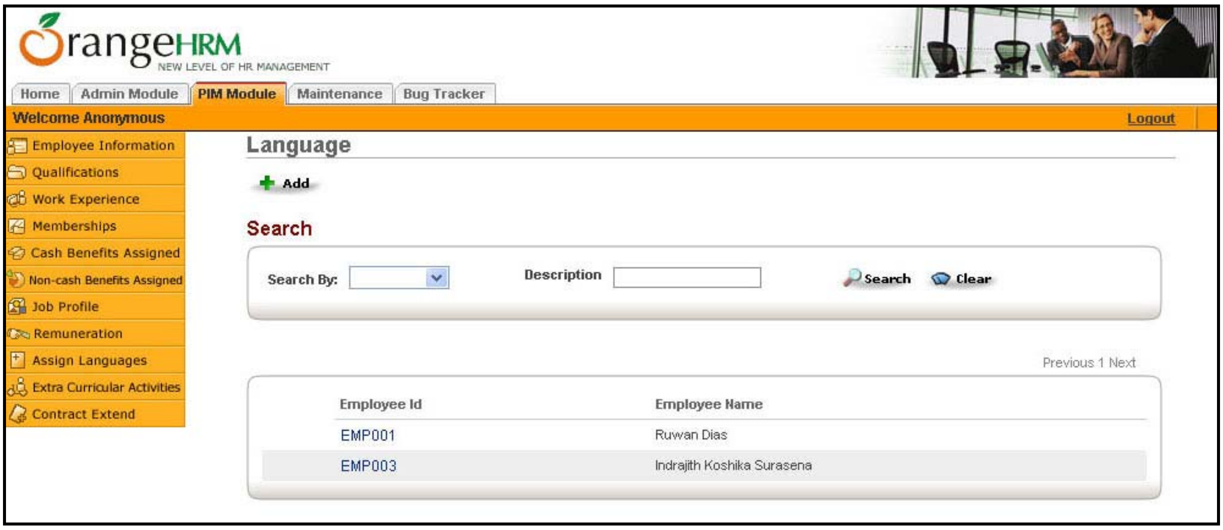

Figure 4.32

A search can be done based on Employee ID or Employee Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page. Click on the **Previous** link to move to the previous page.

4.9.1 Assign Language to Employee

Click on the Employee ID of the relevant employee to assign salary.

1. Select Language
2. Select Fluency
3. Select Rating Grade

See figure 4.33. Click on the **Save** button. The entry is added to the Assigned Languages

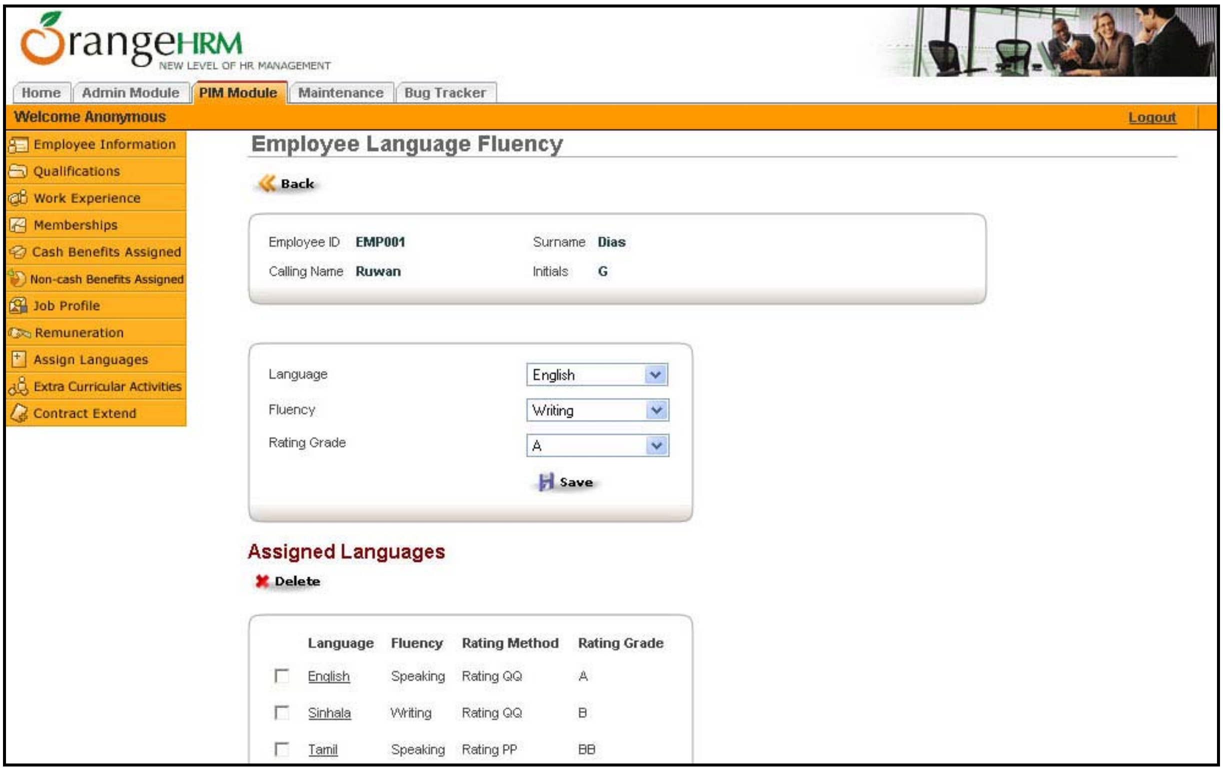

Figure 4.33

4.9.2 Edit Language Fluency of Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Languages' area click on the Language that is to be edited. See Figure 4.34.
3. Click on **Edit** button, make the necessary changes to rating grade and then click **Save** button.

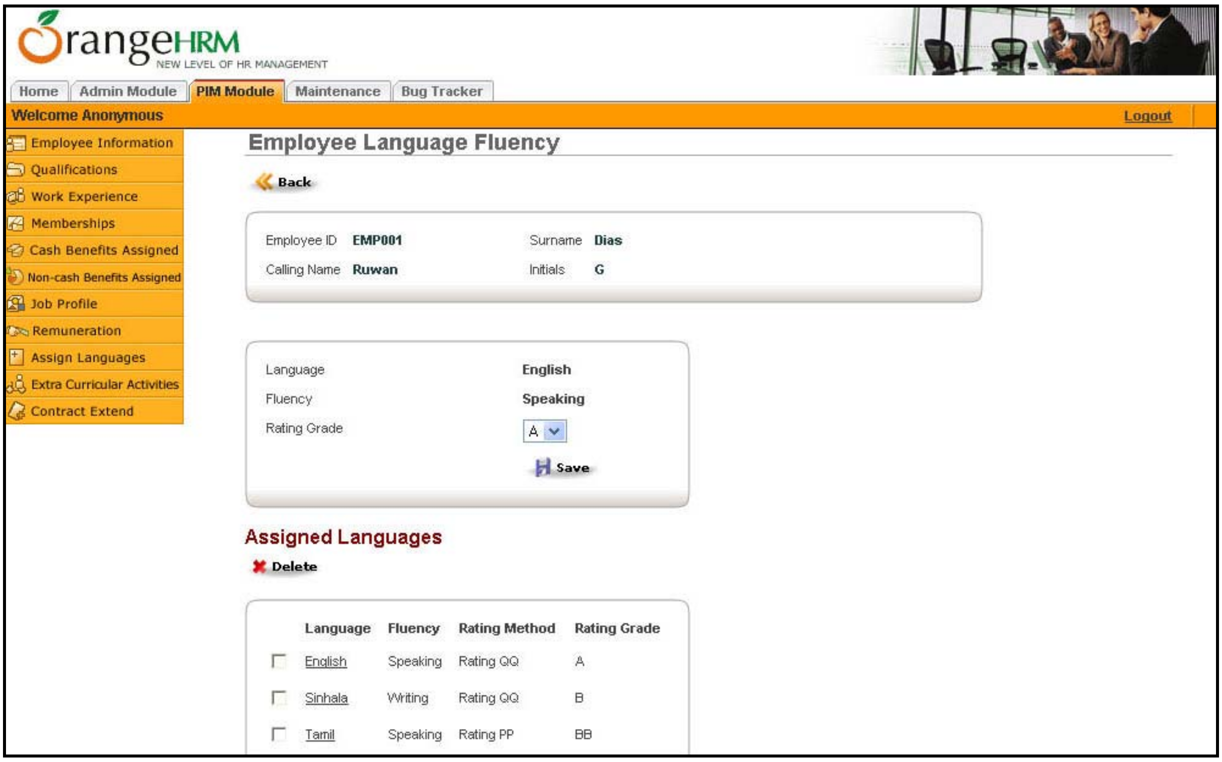

Figure 4.34

4.9.3 Delete Language Fluency Assigned to Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Languages area, click on the checkbox against the entry that is to be deleted and click **Delete** button.

4.10 Extra Curricular Activities

The extra curricular activities of each employee is maintained. To open this page, click on Extra Curricular Activities in the menu. See Figure 4.35. Click on **Add** button to add an employee who has not been assigned with an extra curricular activity previously.

NOTE: Refer section 4.3.1 to add an employee.

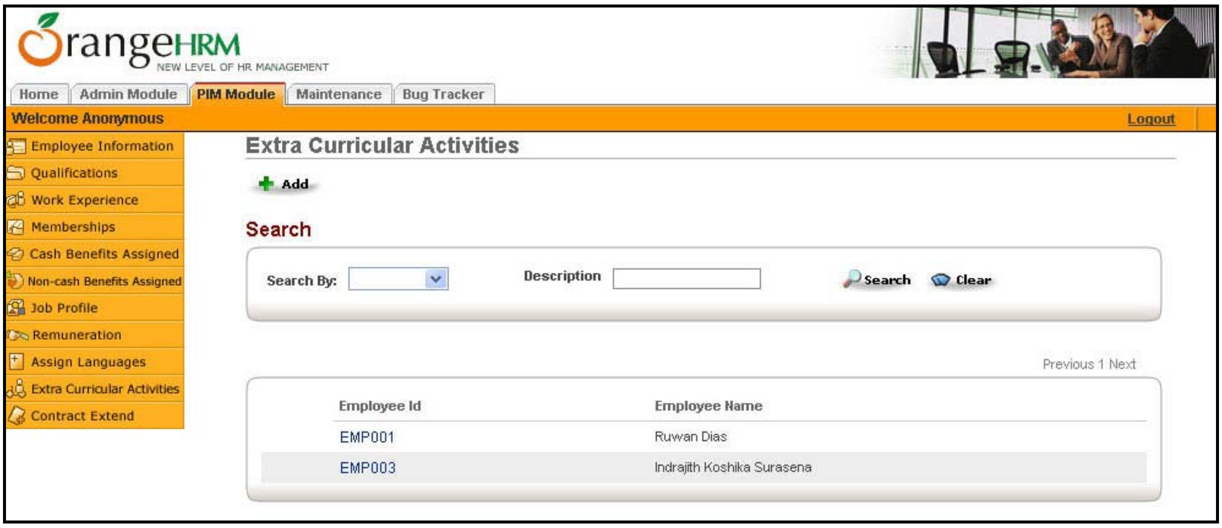

Figure 4.35

A search can be done based on Employee ID or Employee Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page. Click on the **Previous** link to move to the previous page.

4.10.1 Assign Extra Curricular Activity to Employee

Click on the Employee ID of the relevant employee to assign Extra Curricular Activity. See Figure 4.36.

1. Select Extra Curricular Activity Category
2. Select Extra Curricular Activity Type
3. Enter Achievement

Click on the **Save** button. The entry is added to the Assigned Extra Curricular Activities.

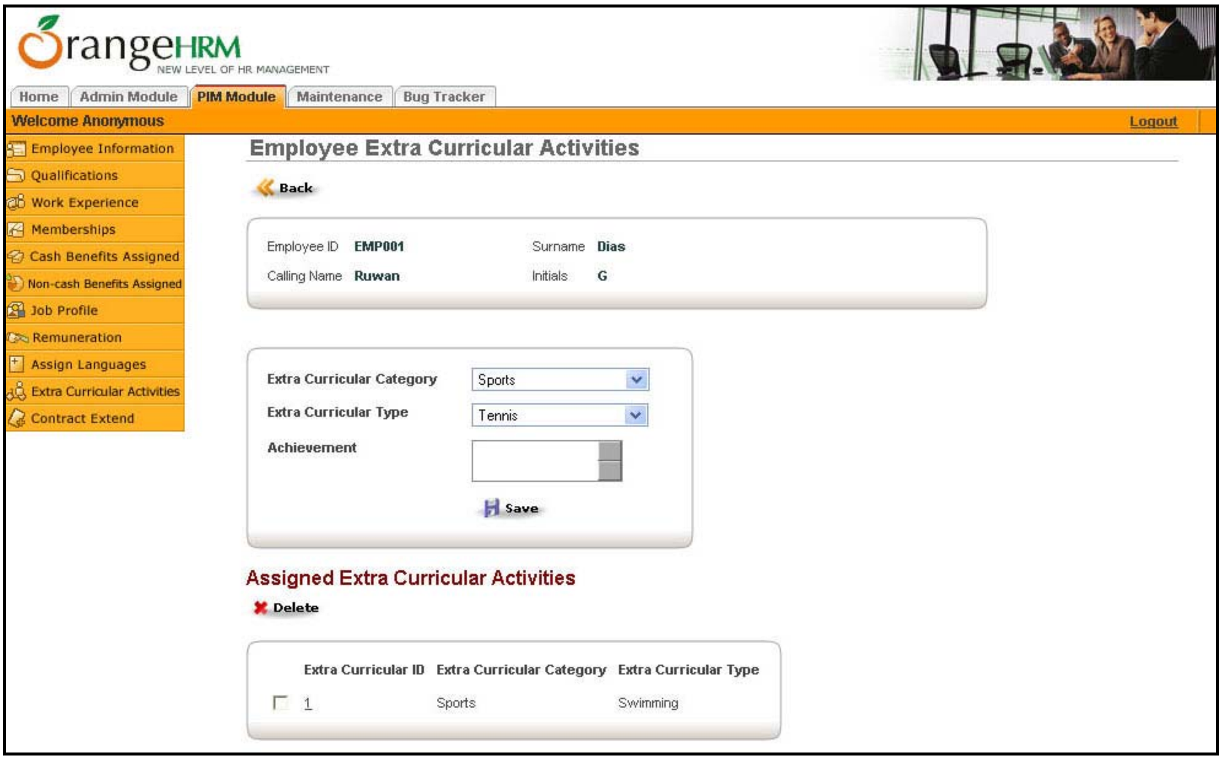

Figure 4.36

4.10.2 Edit Assigned Extra Curr. Act. Of Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Extra Curricular Activities' area click on the Activity ID that is to be edited. See Figure 4.37.
3. Click on **Edit** button, make the necessary changes to the achievement and then click **Save** button.

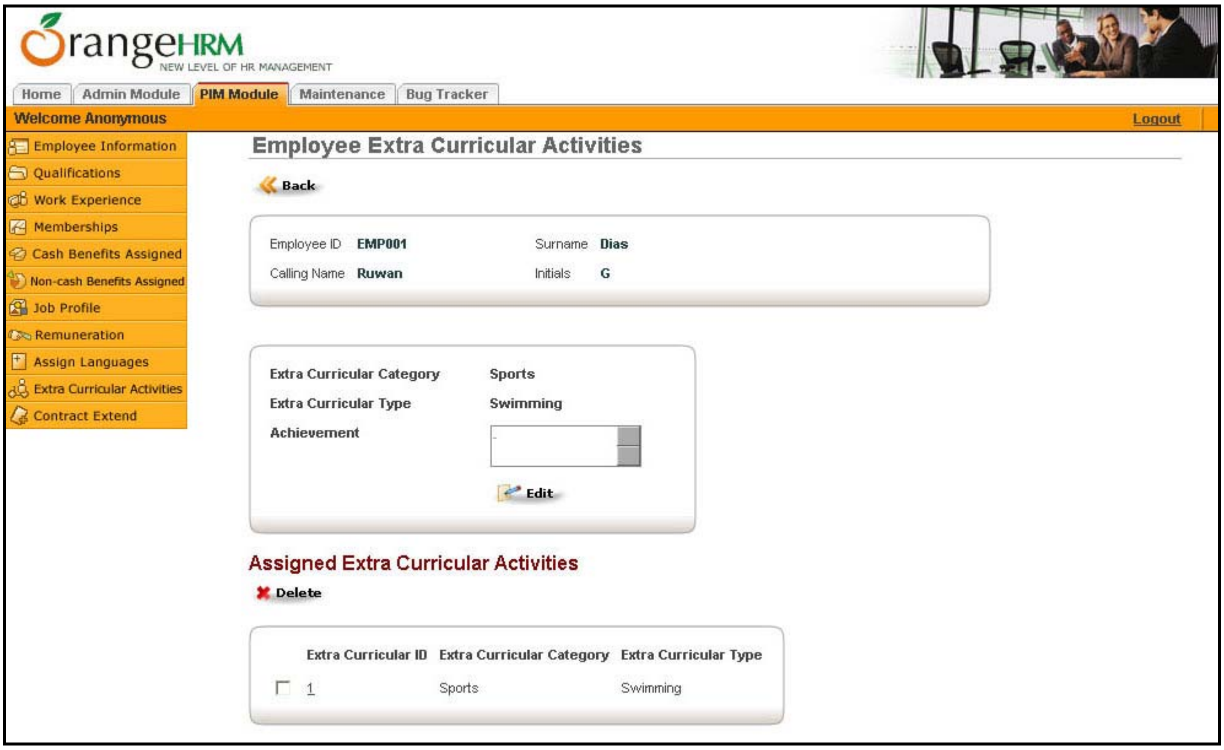

Figure 4.37

4.10.3 Delete Assigned Extra Curr. Act. Of Employee

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Extra Curricular Activities area, click on the checkbox against the entry that is to be deleted and click **Delete** button.

4.11 Contract Extend

This maintains information regarding the contract periods of employees. To open this page, click on Contract Extend in the menu. See Figure 4.38. Click on **Add** button to add an employee who has not been assigned with a contract previously.

NOTE: Refer section 4.3.1 to add an employee. Only employees of Contract Type can be included here.

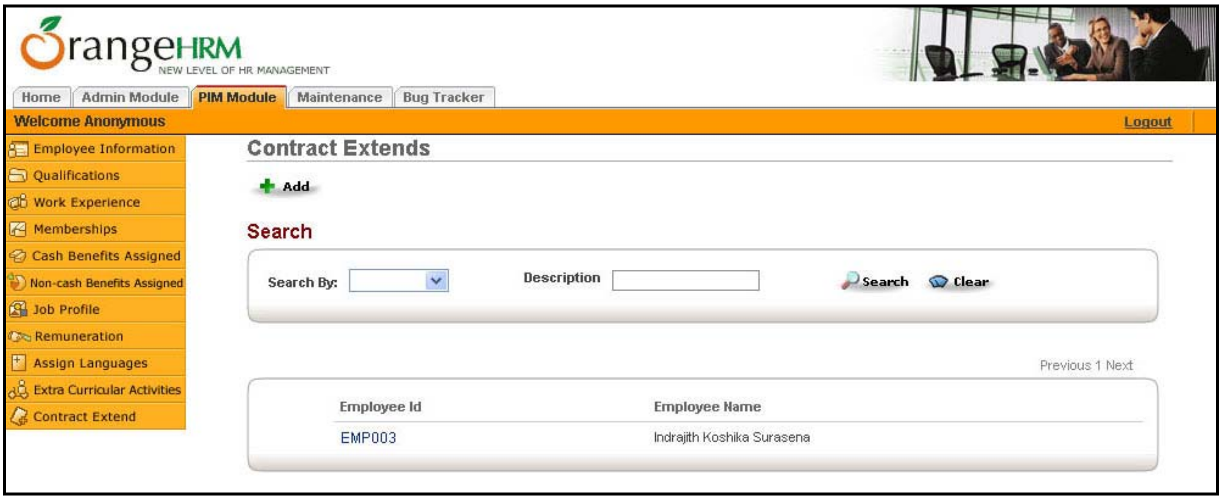

Figure 4.38

A search can be done based on Employee ID or Employee Name. Refer Section 3.12 for steps on searching.

Click on the **Next** link to proceed to the next page. Click on the **Previous** link to move to the previous page.

4.11.1 Add Employee Contract

1. Click on the Employee ID of the relevant employee to assign contracts.
2. Enter Contract Start Date. See Figure 4.39.
3. Enter Contract End Date

Click on the **Save** button. The entry is added to the Employee Contract.

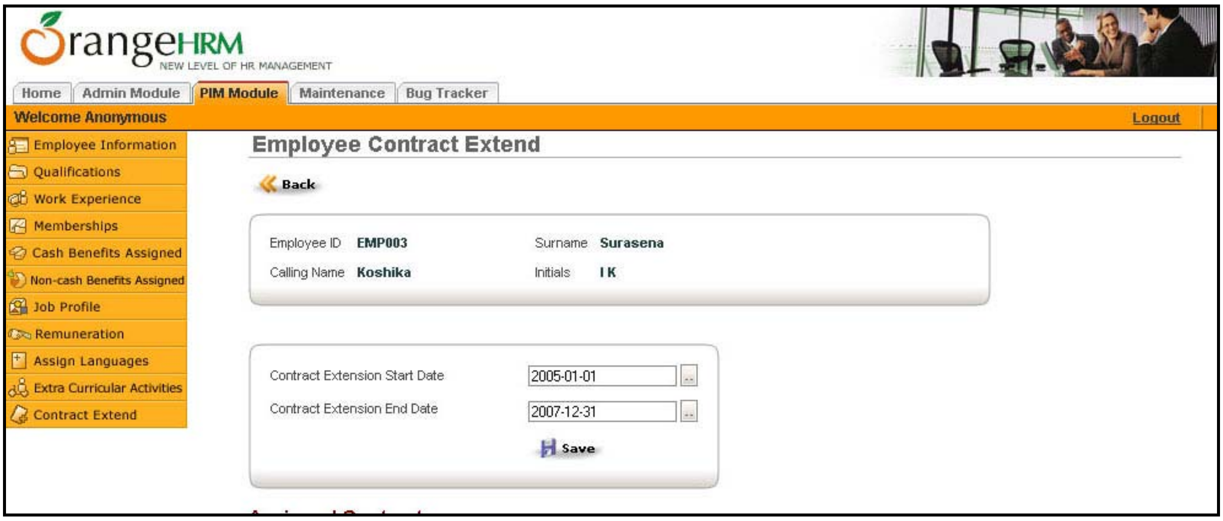

Figure 4.39

4.11.2 Edit Employee Contract

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Contracts' area click on the Contract ID that is to be edited. See Figure 4.40.
3. Click on **Edit** button, make the necessary changes and then click **Save** button.

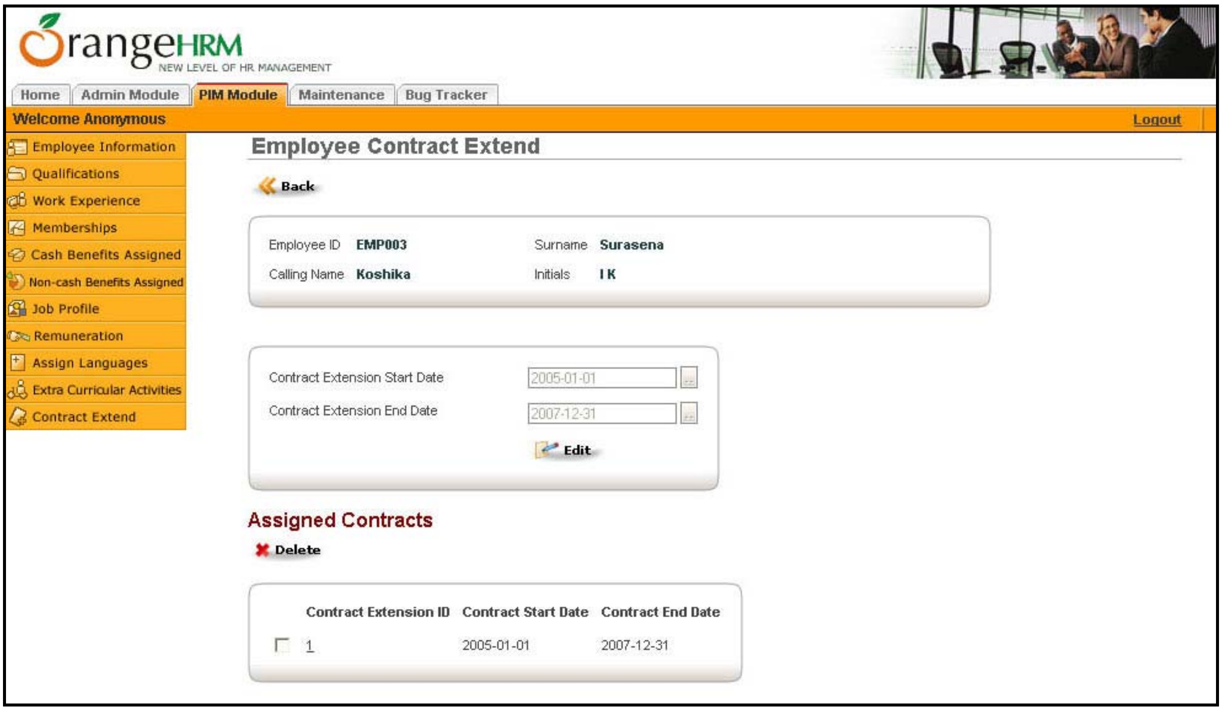

Figure 4.40

4.11.3 Delete Employee Contract

1. Select the Employee by clicking on the relevant Employee ID.
2. In the 'Assigned Employee Contracts' area, click on the checkbox against the entry that is to be deleted and click **Delete** button.

4.12 Search

A similar search facility is available in each page of the PIM Module. Figure 4.41 illustrates an example for the search facility.

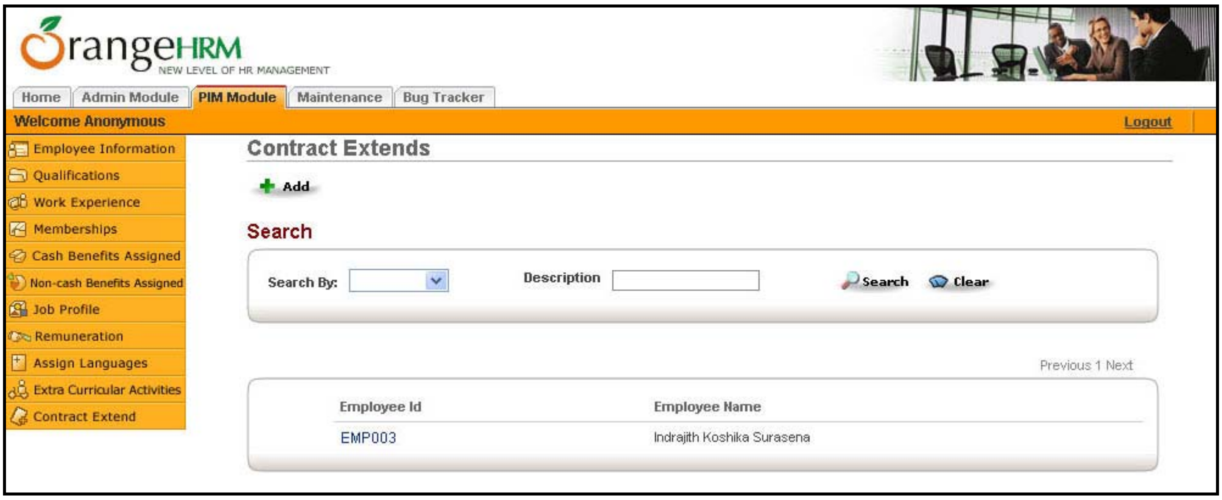

Figure 4.41

1. A search based on the ID or the Description is available. Select the suitable type of search in Search By combo box.
2. Enter value to search for in the Description text box.
3. Click on **Search** button.

The **Clear** button can be used to clear the criteria entered for the search, in the Search By combo and the Description.

Chapter 5

5 Maintenance

This module will be used to handle the maintenance tasks of Orange HRM system. Tasks such as user management, granting access rights, version history etc can be carried out using the Maintenance module. Click on the Maintenance button in the main menu. This would display a sub-menu as follows.

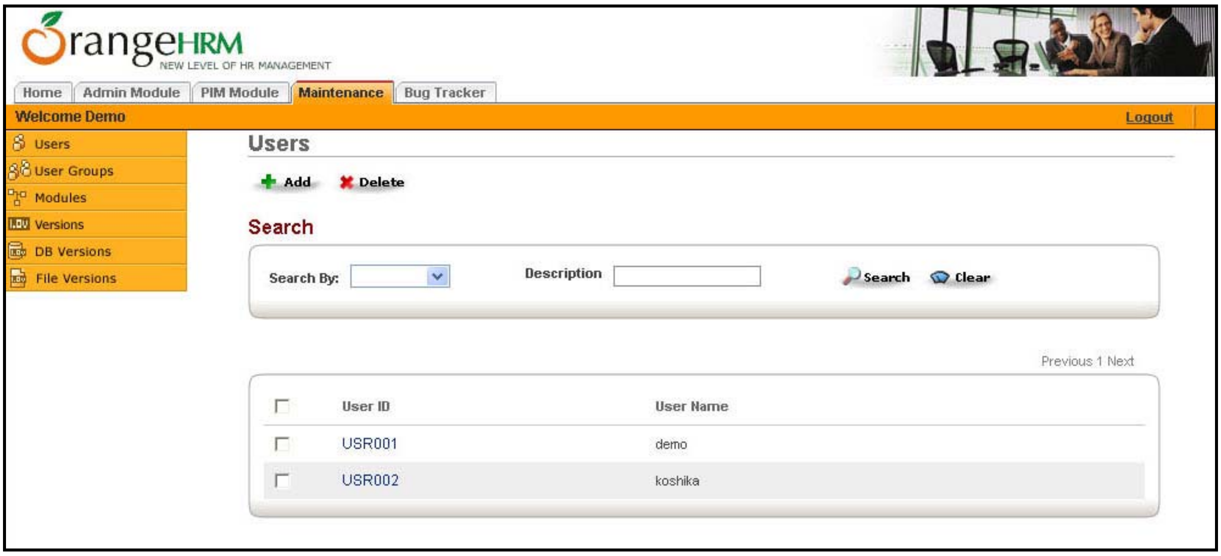

Figure 5.1

5.1 Users

User accounts are maintained using this page. Click on Users in the sub-menu to open this page.

NOTE: User groups should be created first before creating user accounts.

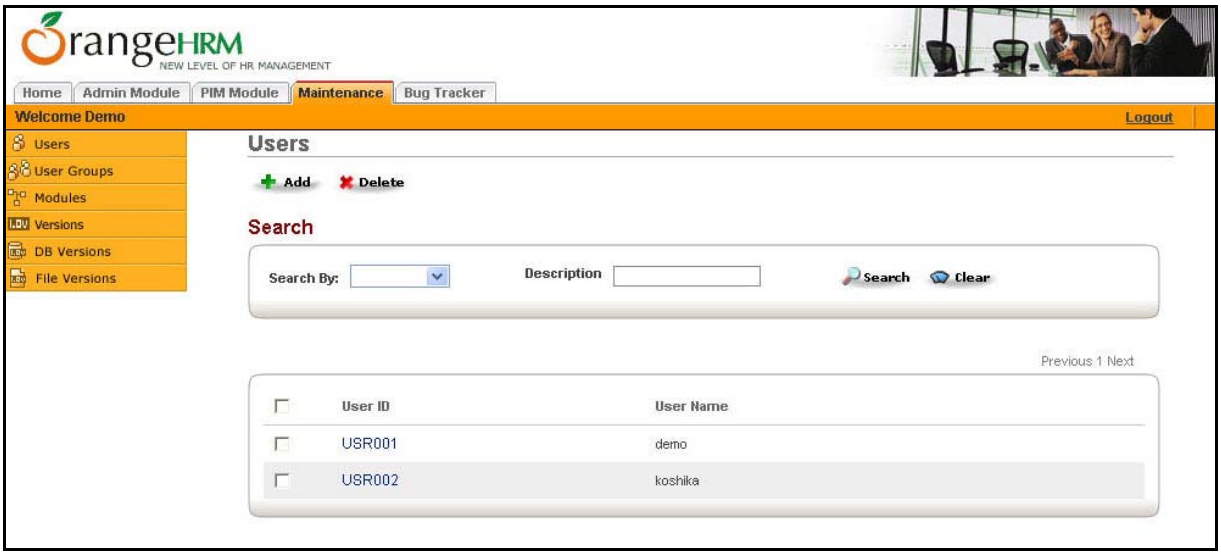

Figure 5.2

5.1.1 Add user

Click on the **Add** button in the above page to add a new user. The following page will be displayed.

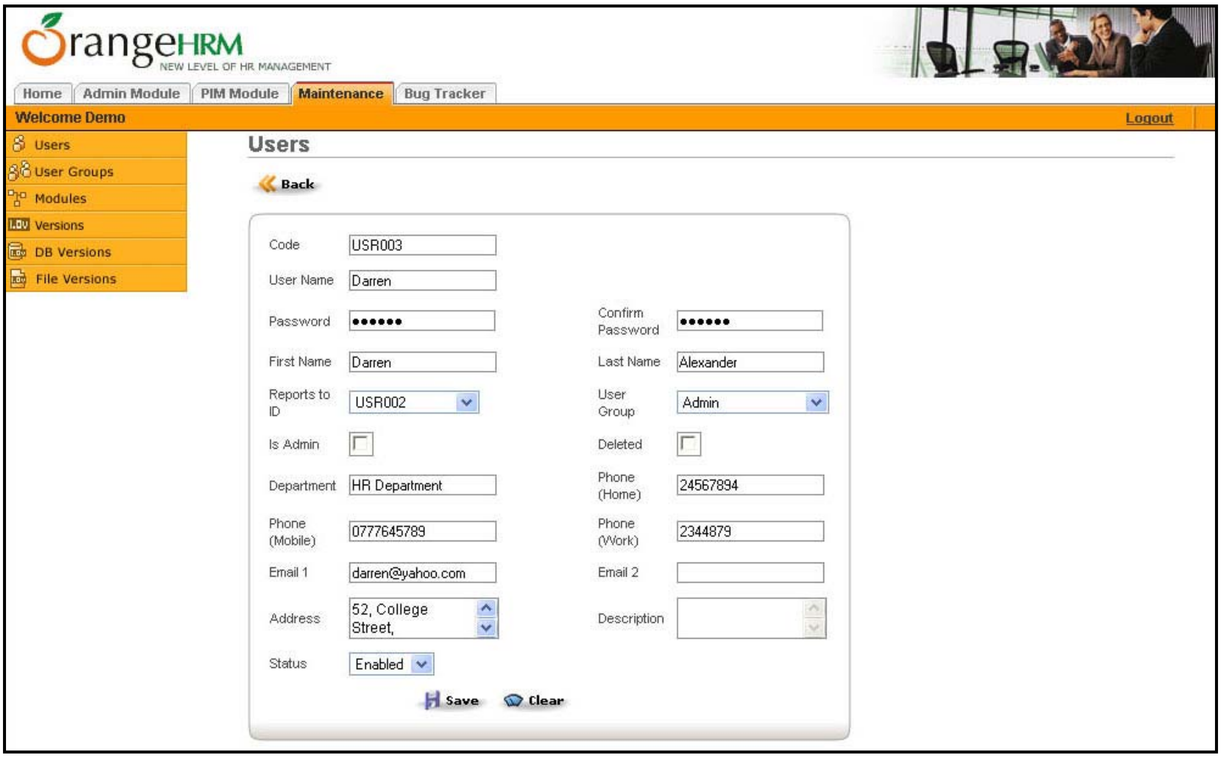

Figure 5.3

1. User Code is auto-generated
2. Enter user name

3. Enter password
4. Confirm Password by entering same password
5. Enter first name
6. Enter last name
7. Click on checkbox if user reports to ID
8. If user is Administrator click on checkbox Is Admin
9. Select User Group
10. Enter Department
11. Enter phone number (mobile and work)
12. Enter email address
13. Enter Address
14. Enter Description

Make the above entries and click on **Save** button. If the save is successful, the Users page is displayed with a 'Addition Successful' Notification.

5.1.2 Edit User

Click on the user ID to be edited. Click on **Edit** button, make the necessary changes and click on **Save** button.

5.1.3 Delete User

Click on the user ID to be edited. Make the necessary changes and click on **Edit** button.

5.2 User Groups

User groups can be created and maintained using this page. Click on User Groups on the menu to open this page.

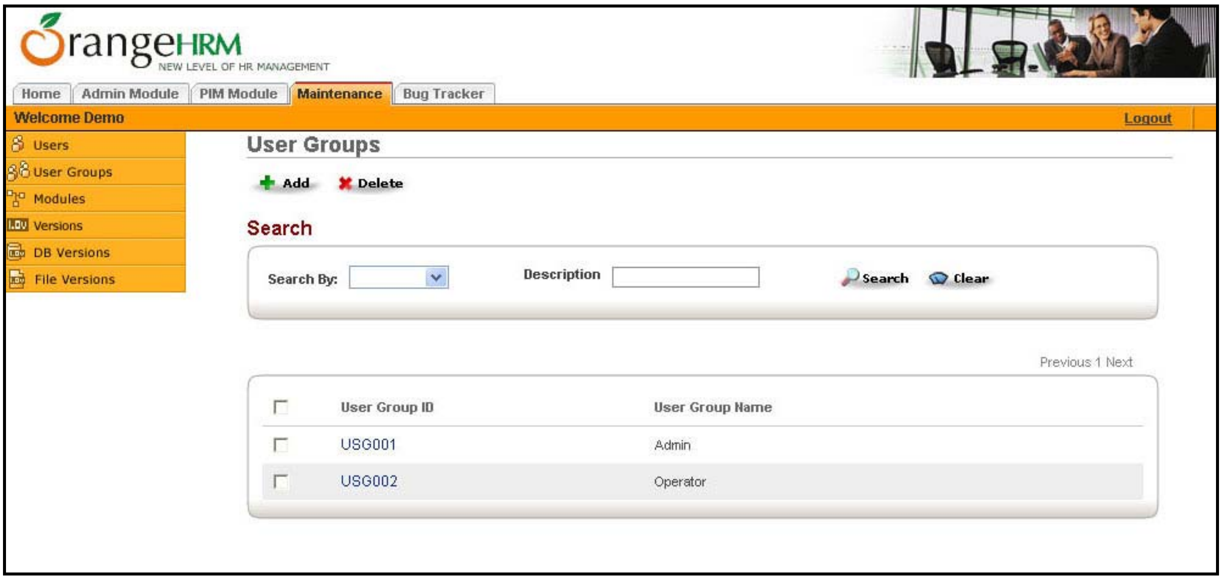

Figure 5.4

5.2.1 Add User Group

Click on **Add** button in the above page to add a new user group. The page shown below will be displayed.

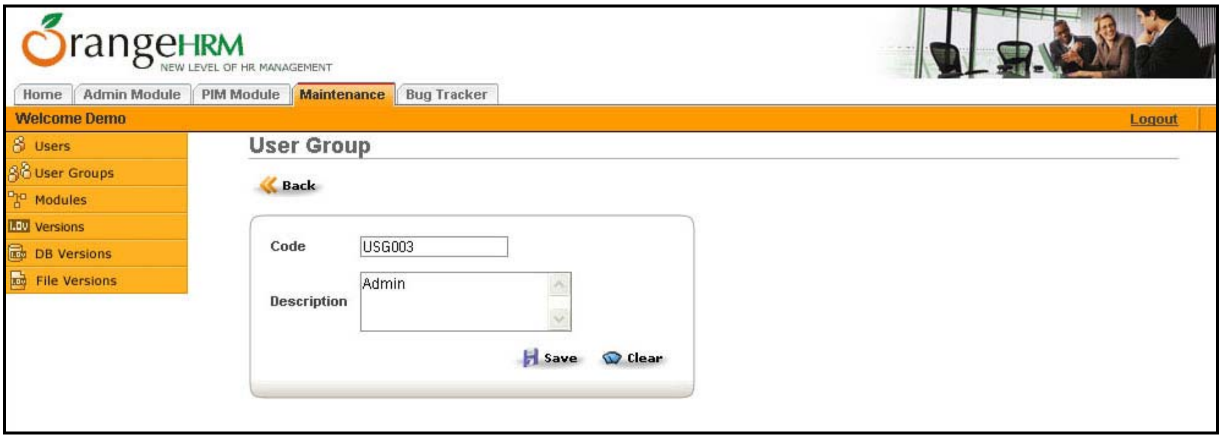

Figure 5.5

1. User Code is auto-generated
2. Enter Description

Click on **Save** button. If the save is successful, the User Groups page is displayed with a 'Addition Successful' Notification.

5.2.1.1 Assigning user rights

1. In the User Groups page, click on the user group to which you wish to assign rights and click on the Assign rights link.
2. Each user group can be assigned with different rights. Click on the required module in the Assigned rights area. See figure 5.6.
3. Click on the **Edit** button and select the check boxes depending on the rights you wish to assign.
4. Then, click on **Save** button

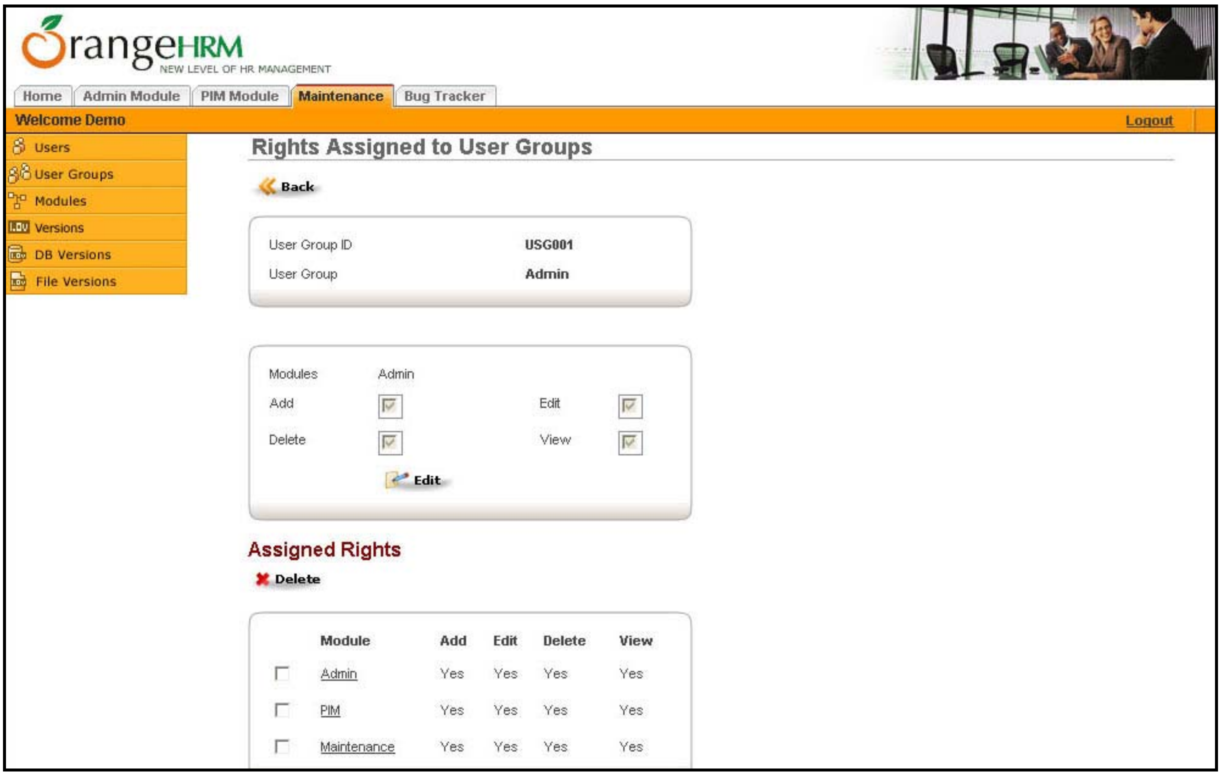

Figure 5.6

5.2.2 Edit User Group

Click on the User Group ID to be edited. Click on **Edit** button, make the necessary changes to the Description and click on **Save** button.

5.2.3 Delete User Group

Click on the checkbox against the user group to be deleted and click on the **Delete** button.

5.3 Modules

The modules page contains information regarding the modules of the Orange HRM system. Module details can be edited, added and also deleted.

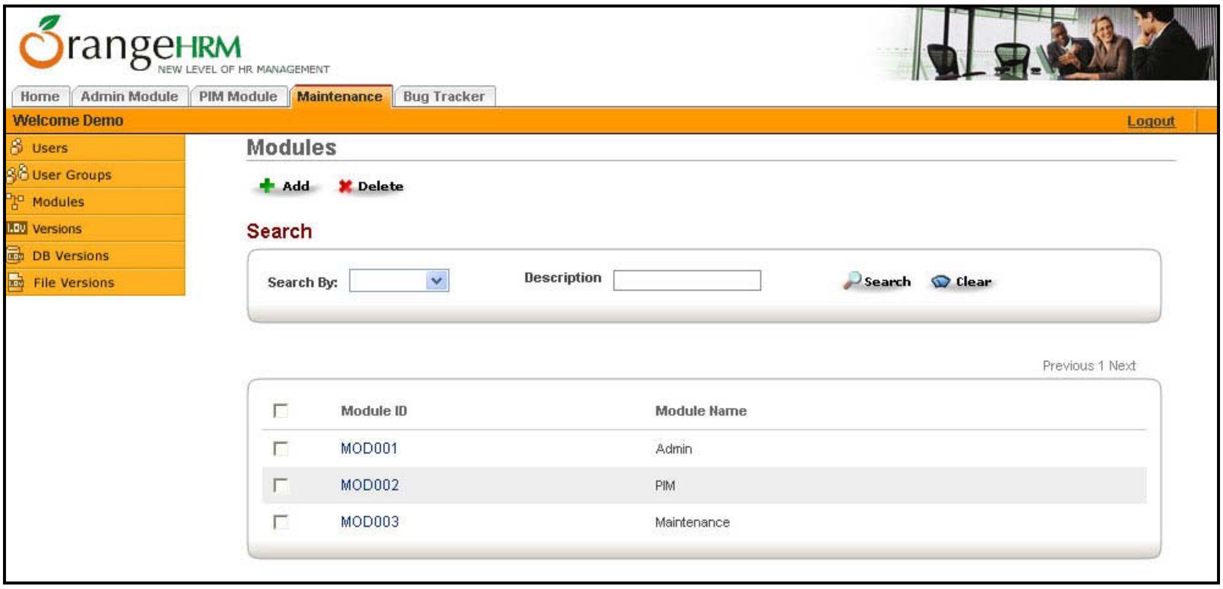

Figure 5.7

5.3.1 Add Module

This would enable the addition of module information. Click on **Add** button in the Modules page. The page used to add a module is displayed in Figure 5.8

NOTE: Version information should have been entered first before adding module details

1. Enter Module ID
2. Enter Module Name
3. Enter Description
4. Owner
5. Enter Owner Email
6. Select Version

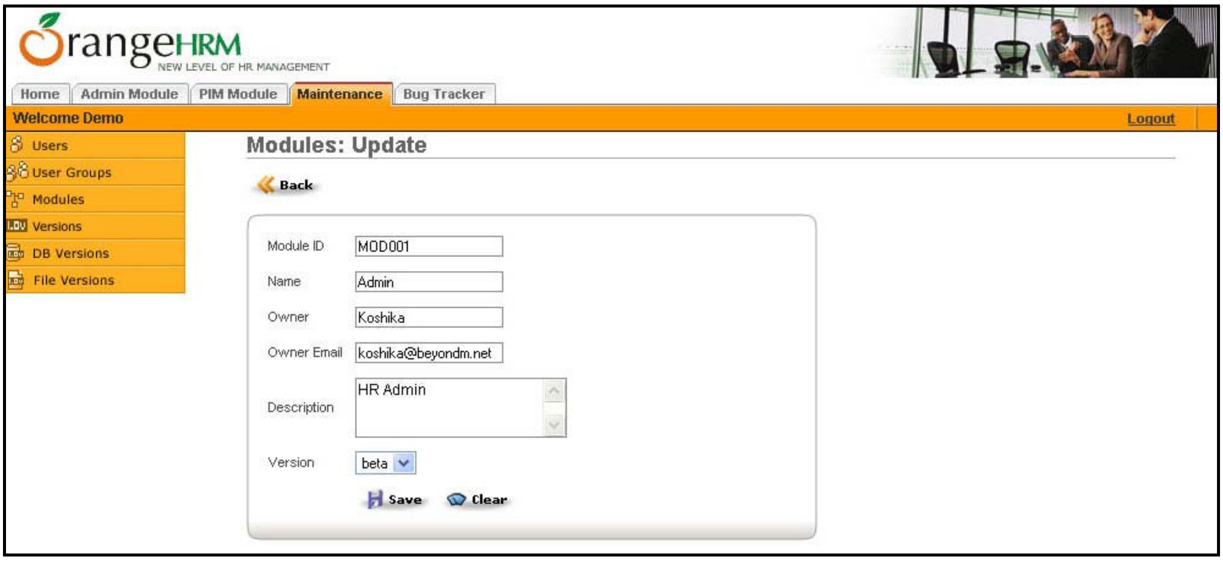

Figure 5.8

Click on **Save** button. If the save is successful, the Modules Information page is displayed with a 'Addition Successful' Notification

5.3.2 Edit Module

Click on the Module ID to be edited. Click on **Edit** button, make the necessary changes and click on **Save** button.

5.3.3 Delete Module

Click on the checkbox against the Module to be deleted and click on the **Delete** button.

5.4 Versions

The modules page contains information regarding the versions of the Orange HRM system. Version details can be edited, added and also deleted

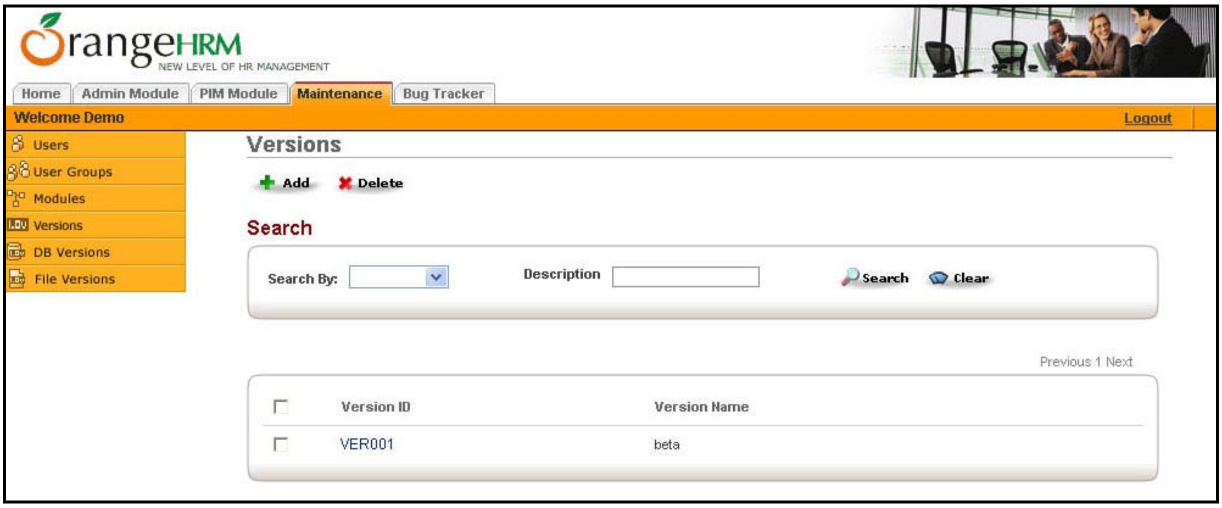

Figure 5.9

5.4.1 Add Version

This would enable the addition of version information. Click on **Add** button in the Version page. The page used to add a module is displayed in Figure 5.10.

1. Version ID is auto-generated
2. Enter Version name
3. Select DB Version
4. Select File Version
5. Click on Deleted checkbox if it is deleted
6. Enter Description

NOTE: File version and DB version information should have been entered before entering version information.

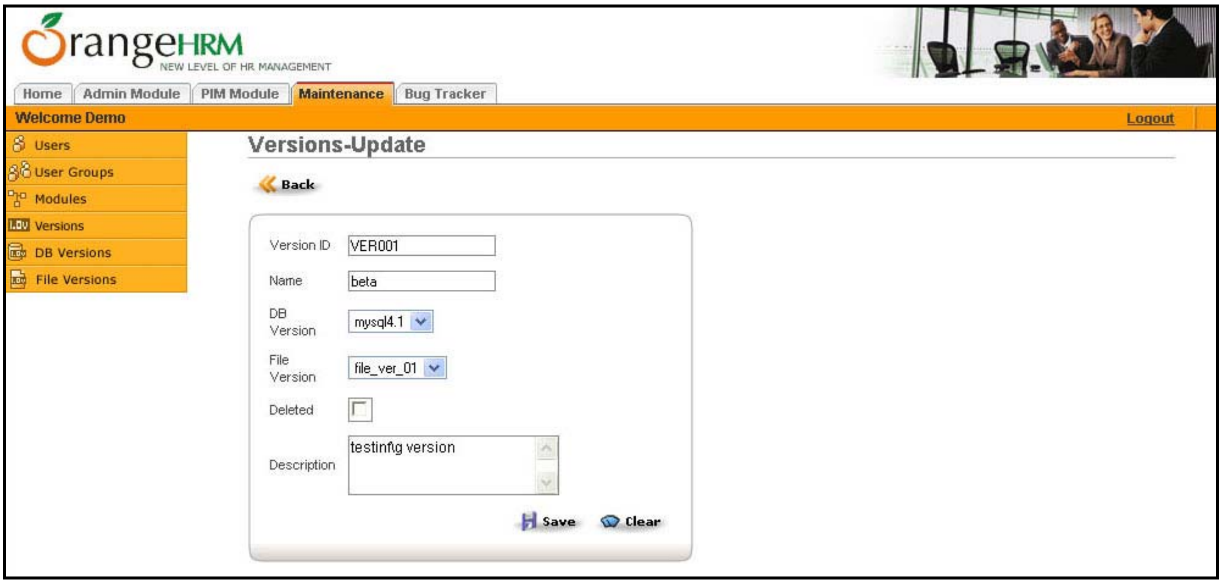

Figure 5.10

Click on **Save** button. If the save is successful, the Version page is displayed with a 'Addition Successful' Notification.

5.4.2 Edit Version

Click on the Version ID to be edited. Click on **Edit** button, make the necessary changes and click on **Save** button.

5.4.3 Delete Version

Click on the checkbox against the version to be deleted and click on the **Delete** button.

5.5 DB Versions

The modules page contains information regarding the Database versions of the Orange HRM system. DB Version details can be edited, added and also deleted.

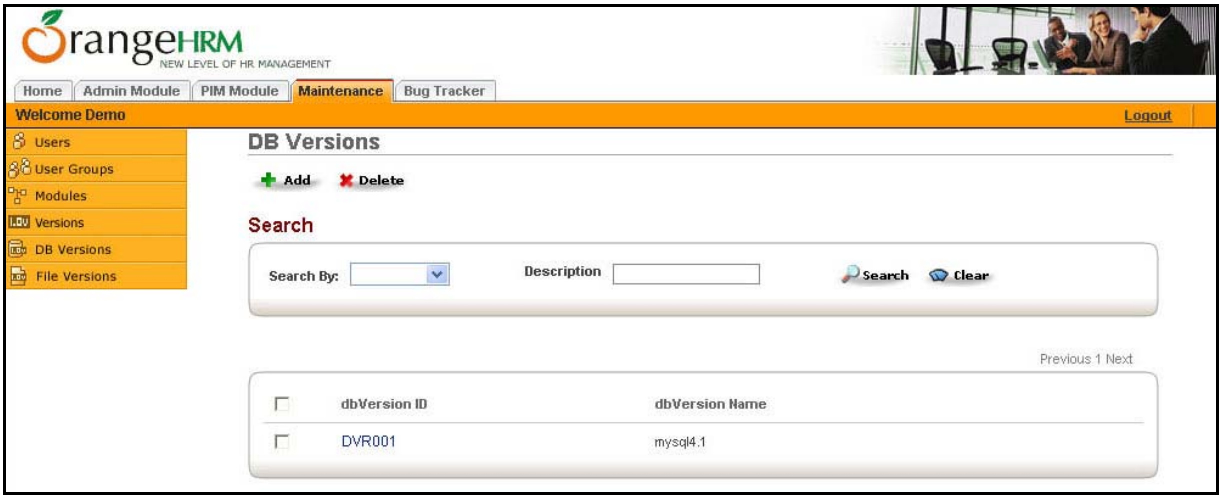

Figure 5.11

5.5.1 Add DB Versions

This would enable the addition of DB version information. Click on **Add** button in the DB Versions page. The page used to add a module is displayed in Figure 5.12.

1. DB Version ID is auto-generated.
2. Enter name
3. Enter Description

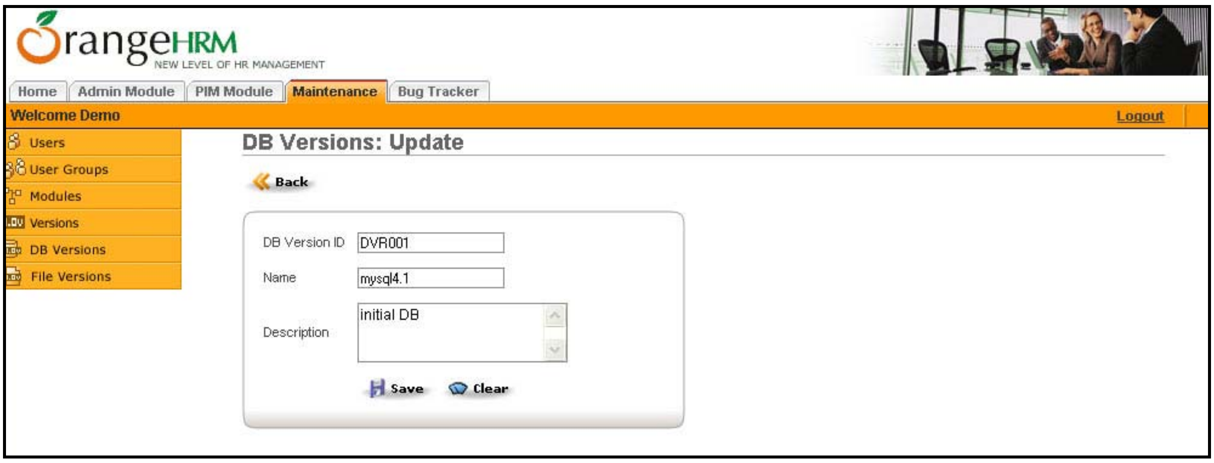

Figure 5.12

Click on **Save** button. If the save is successful, the DB Version page is displayed with a 'Addition Successful' Notification.

5.5.2 Edit DB Version

Click on the DB Version ID to be edited. Click on **Edit** button, make the necessary changes and click on **Save** button.

5.5.3 Delete DB Version

Click on the checkbox against the DB Version to be deleted and click on the **Delete** button.

5.6 File Versions

The modules page contains information regarding the file versions of the Orange HRM system. File version details can be edited, added and also deleted.

Figure 5.13

5.6.1 Add File Version

This would enable the addition of File version information. Click on **Add** button in the File Versions page. The page used to add a file version is displayed in Figure 5.14.

1. File Version ID is auto-generated
2. Enter Name
3. Enter Description

4. Select altered module

NOTE: Module information should have been entered before adding file versions.

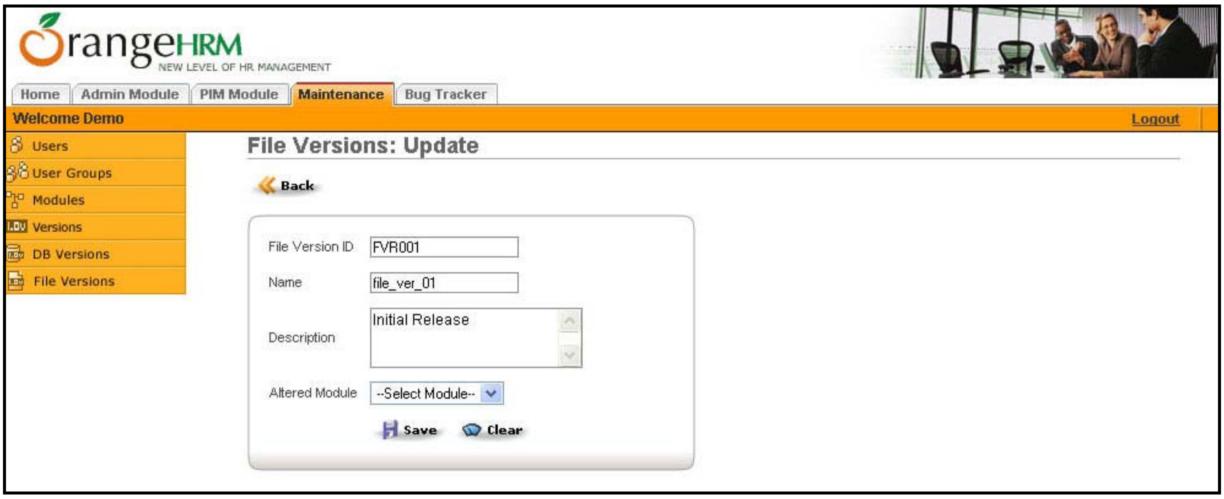

Figure 5.14

Click on **Save** button. If the save is successful, the File Version Information page is displayed with a 'Addition Successful' Notification.

5.6.2 Edit File Version

Click on the File Version ID to be edited. Click on **Edit** button, make the necessary changes and click on **Save** button.

5.6.3 Delete File Version

Click on the checkbox against the File Version to be deleted and click on the **Delete** button.

Chapter 6

6 Bug Tracker

In the event of any bugs being encountered while using the system, these bugs could be immediately reported on-line using the Bug Tracker module. Therefore, this would facilitate the repair of any defects in the system. Information on bugs could be queried as well which makes it useful to determine the status of bugs which have already been reported and also to check whether new bugs have been reported that requires amendments/modifications.

6.1Bugs

6.1.1 Report a Bug

1. Click on Bug Tracker in the menu.
2. Bug No is auto-generated
3. Select the release in which the bug was found in
4. Select source
5. Select module
6. Select type
7. Enter name for bug
8. Enter description of bug
9. Select the assigned developer
10. Select Status : There are 5 different statuses that could be assigned to a bug. Each status is briefly described below.

- New – when a new bug is reported
- Assigned – when a bug is assigned to someone
- Closed – when a bug is closed, probably when it is fixed

- Pending – when a bug has still not been fixed
- Rejected – when a bug report is not accepted.

11. Select priority
12. Enter Work Log

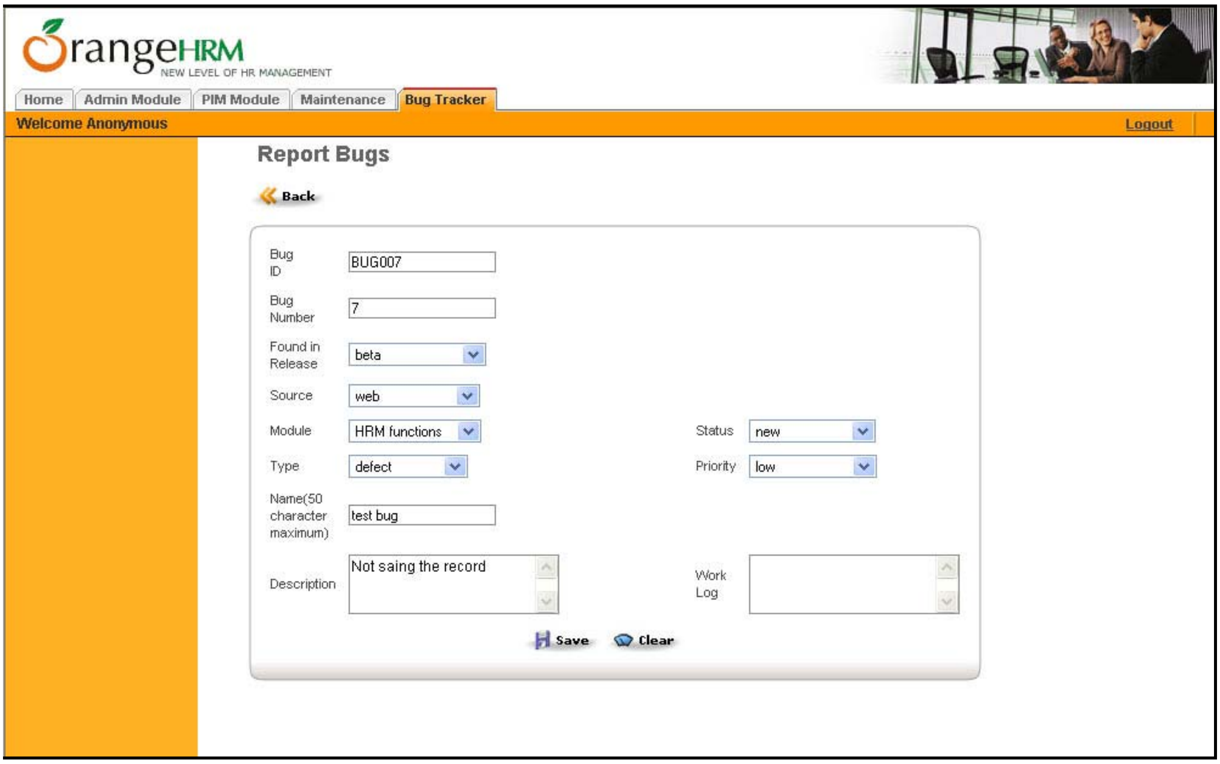

Figure 6.1

Click on **Save** button. If the save is successful, the Bugs Information page is displayed with a 'Addition Successful' Notification.

6.1.2 Edit and Update a Bug Report

The bug reports could be edited and updated.

1. Click on the bug ID of the bug report to be edited.
2. Click on **Edit**, make the necessary changes and then click on **Save**.