SRS Document -OrangeHRM

SOFTWARE REQUIREMENTS SPECIFICATION

OrangeHRM - Live Project

Project Functional Requirement Specification,

Version 1

Resources:

Manual Testing Materials

1. Purpose of the document:

This is not a project plan. It is a guide for system architecture and development, not for phasing, timelines or deliverables. This document is divided into three sections:

• Project Overview

• Information Architecture

• Site Design

2. Project Overview:

2.1 Audience:

This document is intended as a complete guide for ESS-User in using OrangeHRM 3.0. This document is specially designed for non-specialists; specialists may find the document a useful point of reference. By reading this guide, you will learn how to use OrangeHRM through the elements of the graphical user interface and what's behind some of the advanced features that are not always obvious at first sight. It will hopefully guide you around some common problems that frequently appear for users of OrangeHRM.

2.2 Hardware and Hosting:

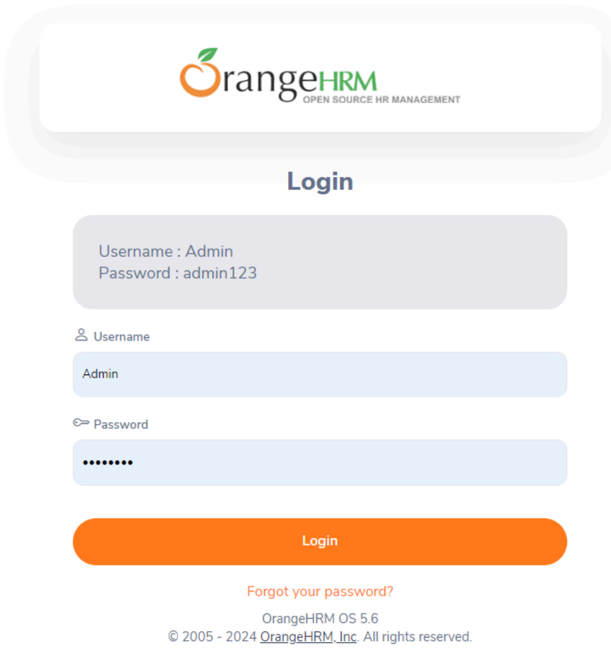
OrangeHRM' s servers will be hosted at X company's site. OrangeHRM will be hosted on two servers: One to host the actual website and (language)code, and the other to host the (database name) database.

3. Information Architecture:

Log in to the OrangeHRM System using your ESS-User account that has been created by the HR Admin as shown in Figure 1.0.
url: OrangeHRM

HR Admin account:

Username	Password
Admin	admin123



The Employee accounts we have:

Username	Password
John Doe	John@123

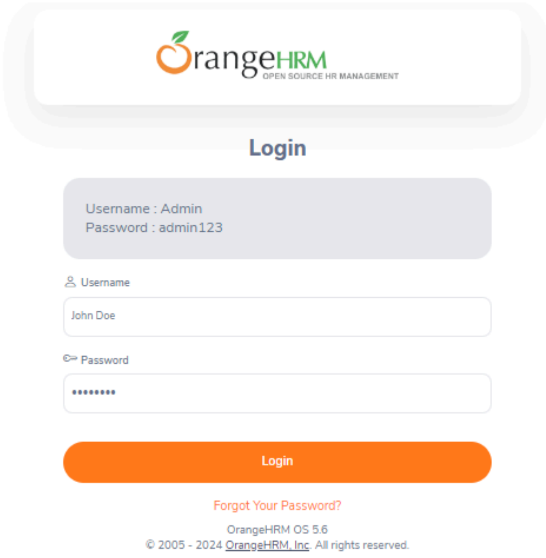


Figure 1.0

3.1 About My info Module:

My Info Module is a powerful tool providing employees of the company with the ability to view relevant information such as personal information and updating personal information with an internet enabled PC without having to involve the HR department. The functionality of this module spans through the entire system, making information available anywhere, anytime. All information is subject to company's defined security policy, where he/she can only view the information he/she is authorized to. An ESS-User can only edit certain fields in the ESS Module, maintaining the security and confidentiality of employee information.

3.1.1 My Info Module (EES View):

When an ESS-User logs into the system for the first time, the first thing they will see is the "Personal Details" screen as shown in Figure 1.1. They are able to edit and enter certain fields.

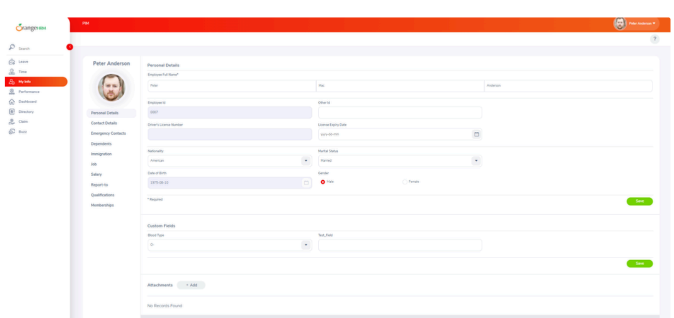


Figure 1.1

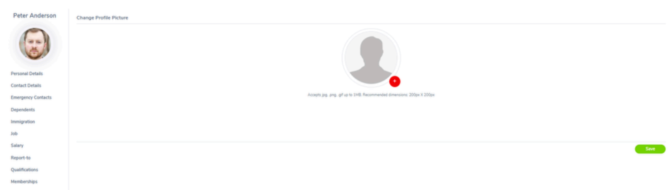
The following are restricted fields where an ESS-User cannot make changes to the following details and need to be populated by the HR Admin and the respective ESS-Supervisor.

Personal Details

- Employee ID
- Driver License No
- Date of Birth

3.1.2 Photograph

The ESS-User can add a photograph of himself/herself by clicking on the photograph at corner of the screen and the screen as shown in Figure 1.2 will appear.



Note: You may only upload a maximum size of 1 Megabyte in jpg, png, gif format.

3.1.3 Contact Details

Contact information can be entered from here. Click on “Contact Details” under the Employee Details column and the screen as shown in Figure 1.3 will appear.

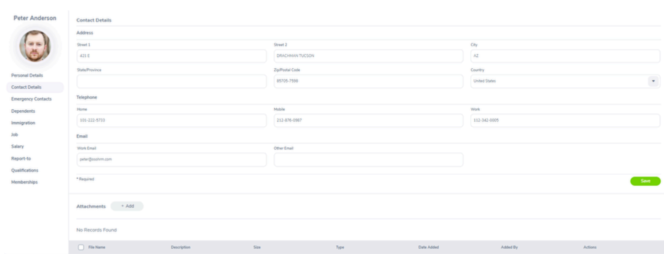


Figure 1.3

Click “Edit” to enter the information.

You can edit the following:

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

Once you have completed this form click “Save”.

3.1.4 Emergency Contact

Contact details which will be needed during an emergency can be entered here. Select “Emergency Contacts” on the “Personal” column and the screen as shown in Figure 1.4 will appear.

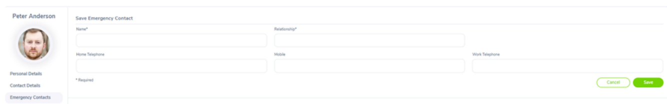


Figure 1.4

Enter the “Name” of the person you wish the company to contact in case of emergency, your “Relationship” with the contact person provided and a “Home Telephone” or “Mobile Number” the company can reach him/her.

Click “Save” once the fields are added, the emergency contact will be listed as shown in Figure 1.5.

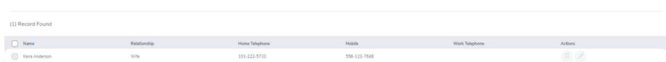


Figure 1.5

You may add multiple entries of emergency contacts. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”. You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and upload the following file by clicking “Upload”.

3.1.5 Dependents

If you have any dependents you can enter them here. To add a dependent, click on “Dependents” under the “Personal” column and the screen as shown in Figure 1.6 will appear.

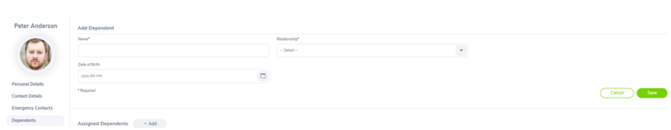


Figure 1.6

Enter the “Name” of your dependent, the “Relationship” of the dependent to you and his/her “Date of Birth”. Click “Save” once you have entered the following fields and your dependent will be listed as shown in Figure 1.7.

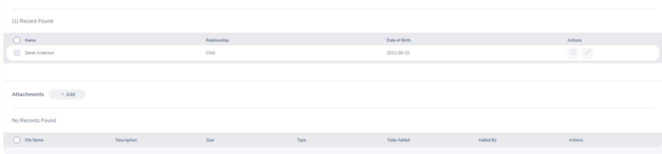


Figure 1.7

You may add multiple entries of dependants. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and uploading the following file by clicking “Upload”

3.1.6 Immigration

Your immigration information can be entered here. To add your immigration information, select “Immigration” under the “Personal “column and the screen as shown in Figure 1.8 will appear.

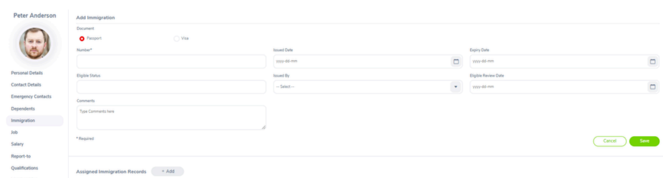


Figure 1.8

Select the document type (Passport or Visa) you wish to add details of, the “Number” whether it is a passport number or a visa number, the “Issued Date”, “Expiry Date”, the “Eligible Status” of your Passport/Visa and the “Eligible Review Date” as to when the eligibility status was reviewed. You may write a comment if necessary. Click “Save” once the fields are added and the following immigration documents will be listed as shown in Figure 1.9.

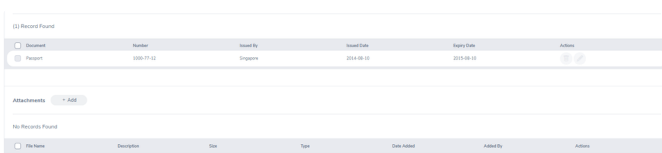


Figure 1.9

You may add multiple entries of immigration documents. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”. You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and uploading the following file by clicking “Upload”.

3.1.7 Job

The ESS-User cannot make changes in the job details. You are only able to view your job details that have been pre-defined by the administrator as shown in Figure 2.0. You are restricted from editing the following fields:

- Job Title
- Job Specification
- Employment Status
- Job Category
- Joined Date
- Sub Unit
- Location
- Employment Contract Start Date
- Employment Contract End Date
- Attachments

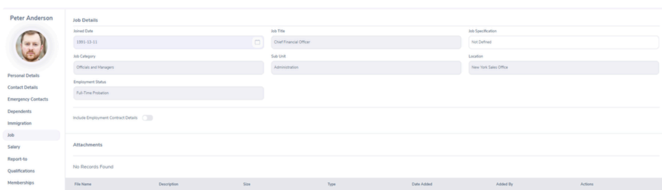


Figure 2.0

3.1.8 Salary

The salary information field is completely hidden from the ESS-User as shown in Figure 2.1. Only the HR Admin has access to this information and has to be manually communicated to the ESS-User. You are restricted from editing the following fields:

- Salary Component
- Pay Frequency
- Currency
- Amount
- Comment
- Direct Deposit Details
- Attachments

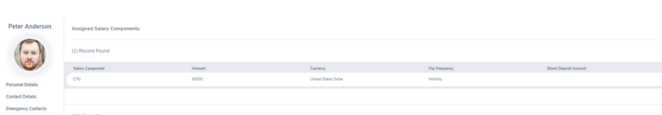


Figure 2.1

3.1.9 Report To

As an ESS-User, you are only able to view the list of supervisors that you report to and if you are an ESS-Supervisor as well, you will see the list of your subordinates as shown in Figure 2.2.

You are restricted from editing the following fields:

- Assigned Supervisors
- Assigned Subordinates
- Attachments

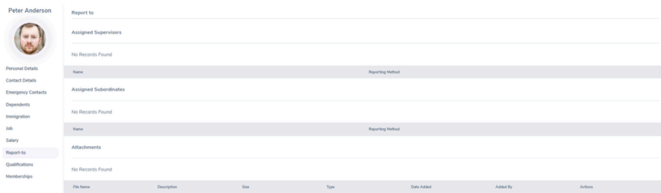


Figure 2.2

3.1.10 Qualifications

- Work Experience:

Your previous work experiences can be entered here. To enter previous work experiences, click “Add” under “Work Experience” and the screen as shown in Figure 2.3 will appear.

Figure 2.3

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

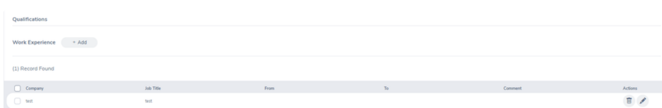


Figure 2.3

You may enter multiple entries of work experience. To delete an entry, click on the check box next to a particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

- Education

You are able to enter details of your education here. To enter education details, click “Add” under “Education” and the screen as shown in Figure 2.5 will appear.

Figure 2.5

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

Figure 2.6

You may enter multiple entries of education

To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”

- Skills

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

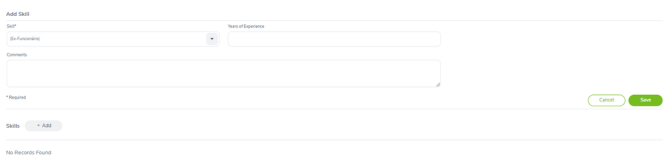


Figure 2.7

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

Figure 2.8

You may enter multiple entries of skills.

To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

- Languages

You can enter the various languages that you are competent in, with the level of competency. To enter your language of competency, click “Add” under “Language” and the screen as shown in Figure 2.9 will appear.

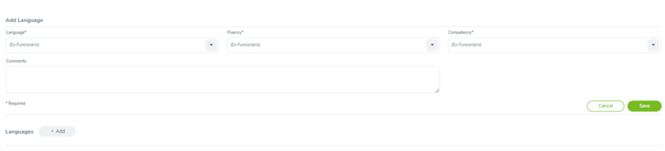


Figure 2.9

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

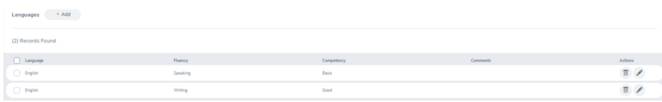


Figure 3.0

You may enter multiple entries of languages. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

- License

Here you can enter the licenses that you may have. To enter licenses, click “Add” under “License” and the screen as shown in Figure 3.1 will appear.

Figure 3.1

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

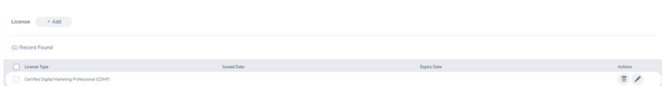


Figure 3.2

You may enter multiple entries of licenses.

To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

- Attachments

Any supporting documents regarding your qualification that you think is needed by the management can be attached here. Please note that each document cannot exceed 1 megabyte, but you can attach more than one document. To add an attachment, click “Add” under attachment and the screen as shown in Figure 3.3 will appear. Click “Browse” and select the file from the relevant path and click “Upload” to upload it.

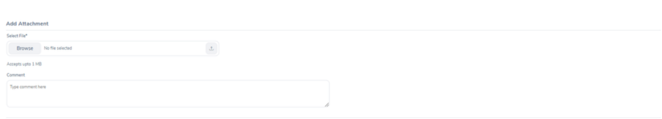


Figure 3.3

Once you have uploaded the file, the file will be listed. You may upload multiple attachments. To delete an entry click on the check box next to the particular entry and click "Delete". Multiple selections can be deleted simultaneously.

3.1.11 Membership

If you are a members of any committee, institute etc. those details can be entered here. To enter membership details, go to My Info>>Personal>>Membership and click "Add" and the screen as shown in Figure 3.5 will appear

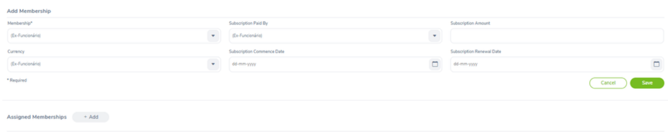


Figure 3.5

Click "Save" once all the fields are entered and the particular membership detail will be listed as shown in Figure 3.6

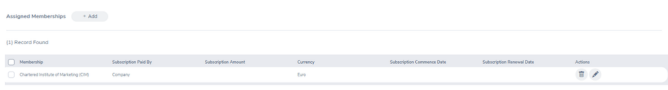


Figure 3.6

You may enter multiple entries of memberships. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete". You may also upload any attachment that would support the details you have entered on the form by clicking "Add" under the "Attachment" and selecting a file from a relevant path and upload the following file by clicking "Upload".

3.2 Admin Module

The Admin Module provides you with full control of all settings that affect the action of your OrangeHRM implementation. Through the Admin Module, you can:

● Define the company hierarchy, pay grades, work shifts, projects, memberships, qualifications etc

● Add other administrators, and set access levels for each user

● Handle security issues

● Configure email notifications

● Configure language localization and date format that will be reflected throughout the whole system.

● Enable/Disable Module display

3.2.1 User Management Module

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

To add a system user, go to **Admin>> User Management>> Users** and click “Add”, a screen as shown in Figure 3.7 would appear. Click “Save” once the fields are added.

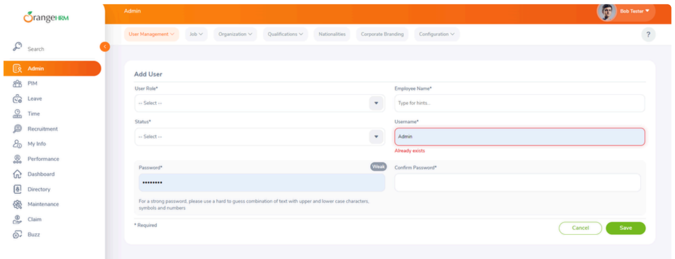


Figure 3.7

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

- User Role: You can assign user roles for each user whether they would fall under as an “Admin” or “ESS” user type to define their user rights.
  ● Admin: have access full access to the system.
  ● ESS - Employee: limited access to the system. The employee can only access his/her information
- Status: Enabled or Disabled. (Disabled users cannot login to their accounts).
- Unique Username.
- Employee Name.
- Password
- Confirm Password (needs to be matching)

A list of user logins as shown in Figure 3.8 would appear once an entry is added, and the Records count will be increased by 1 after adding a user. The default system user available will be Admin and has full access to the system.

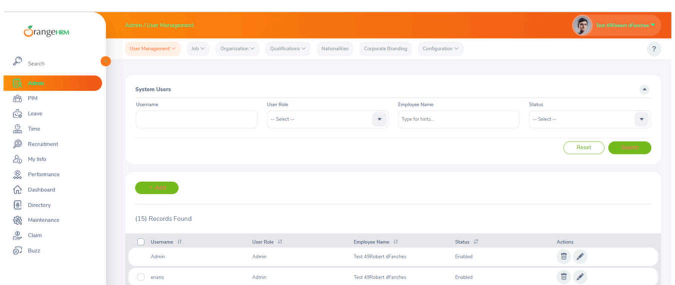


Figure 3.8

To delete a system user, click on the Delete icon under “Actions” column. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete Selected” as shown in Figure 3.9

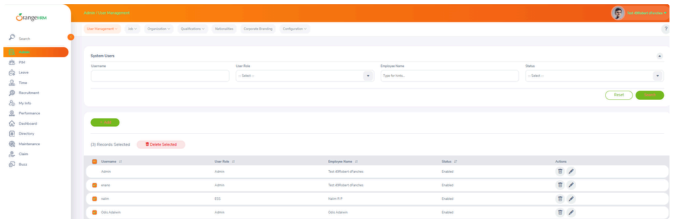


Figure 3.9

To edit system user, click on the Edit icon under “Actions” column as demonstrated in Figure 4.0.

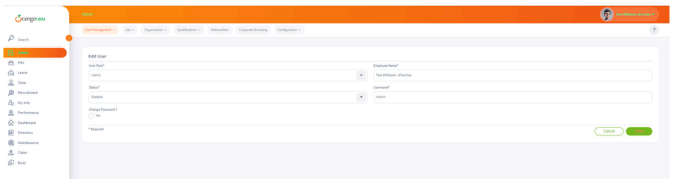


Figure 4.0

3.2.2 Job Module

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

- Job Titles.
- Pay Grades.
- Employment Status.
- Job Categories.
- Work Shifts.

3.2.2.1 Job Titles

The job titles specific to the company can be defined in this option. To add an entry, go to **Admin>> Job>> Job Titles** and click “Add”.

A screen as shown in Figure 4.1 would appear. Click “Save” once the fields are added.

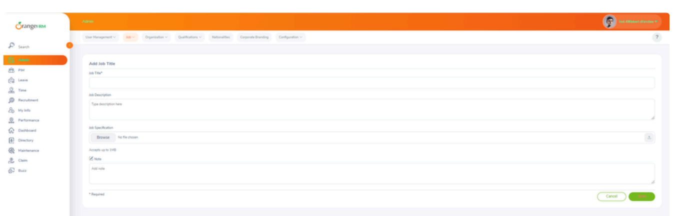


Figure 4.1

A list of job title(s) will appear as shown in Figure 4.2. You may also enter multiple job titles. You may view and edit Job Title details by clicking on the Edit icon in “Actions” column.

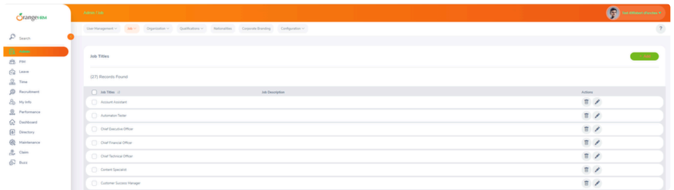


Figure 4.2

To delete a Job Title click on the Delete icon under “Actions” column next to the Job Title name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete Selected” as shown in Figure 4.3

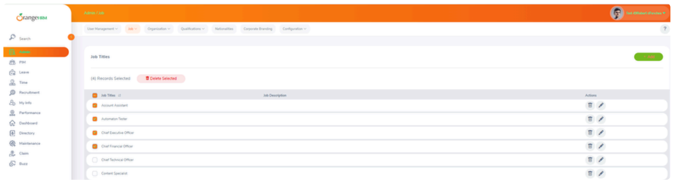


Figure 4.3

3.2.2.2 Pay Grades

The HR Admin can define the pay grade by setting a minimum salary, maximum salary, step increase, and the currency to be paid in. To add an entry, go to **Admin>>Job>> Pay Grades** and click “Add” and a screen as shown in Figure 4.4 would appear.

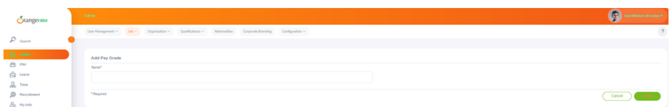


Figure 4.4

Click “Save” once the field is added.

Once you click “Save” the screen in Figure 4.5 would appear and you can now define the currency and the minimum/maximum salary for each pay grade created. You can define the pay grade by clicking “Add” under “Assigned Currencies” and then providing the pay details under “Add Currency”. Click “Save” to save the currency for the Pay Grade as shown in Figure 4.6

Note: Maximum salary should be higher than minimum salary.

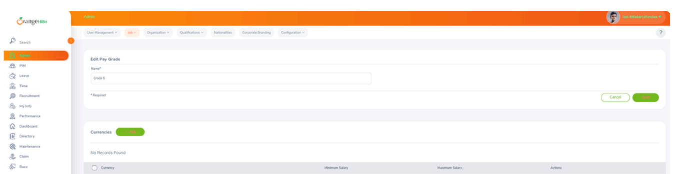


Figure 4.5

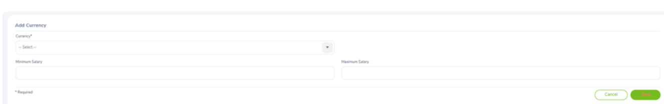


Figure 4.6

You can assign multiple currencies here and each currency defined will be listed as shown in Figure 4.7.

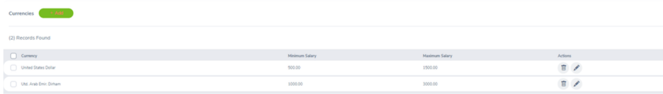


Figure 4.7

You can edit details of a particular currency by clicking on the “Edit” icon under Actions column.

You can delete a particular currency by clicking on “Delete” icon under Actions column. Also, it is possible to delete multiple entries by clicking the check box entries you wish to delete and simply clicking “Delete Selected” as shown in Figure 4.8.

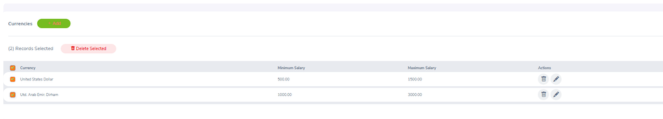


Figure 4.8

All pay grades added will be listed as shown in figure in 4.9. To view Pay Grade details or edit click on “Edit” icon under “Actions” column.

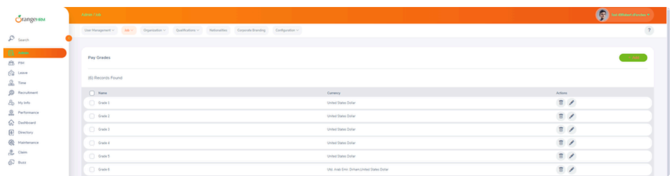


Figure 4.9

To delete a Pay Grade click on the “Delete” icon under “Actions” column next to the “Pay Grade” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete Selected” as demonstrated in Figure 5.0.

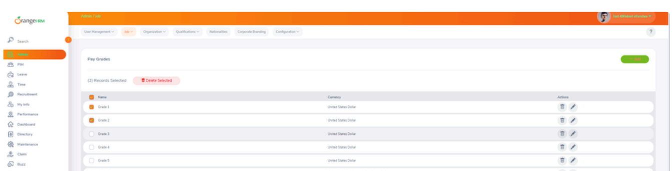


Figure 5.0

3.2.2.3 Employment Status

Employment Status allows you to define the status of employment employees are hired for or if they are terminated. To add an entry, go to **Admin>> Job>> Employment Status** and click “Add” and a screen as shown in Figure 5.1 would appear.

Click “Save” once the field is added.

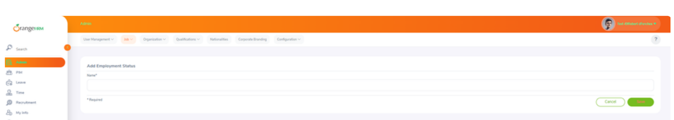


Figure 5.1

A list of Employment Status as shown in Figure 5.2 would appear once an Employment Status is added. To edit an employment status, click on the “Edit” icon under “Actions” column next to “Employment Status” name.

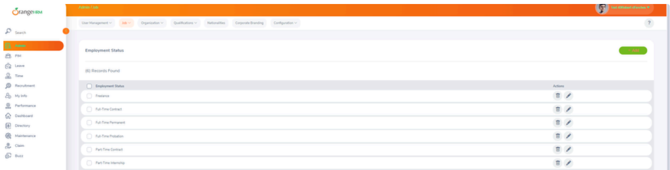


Figure 5.2

To delete an Employment Status click on the “Delete” icon under “Actions” column next to the “Employment Status” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete Selected” as shown in Figure 5.3.

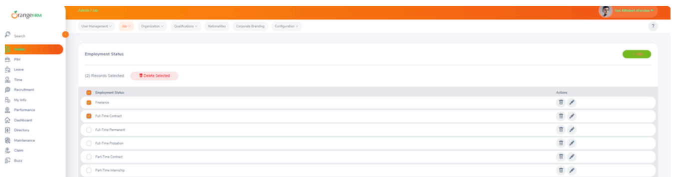


Figure 5.3

3.2.2.4 Job Categories

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

To add an entry, go to **Admin>> Job>> Job Categories** and click on “Add” and a screen as shown in Figure 5.4 would appear.

Click “Save” once the field is added.

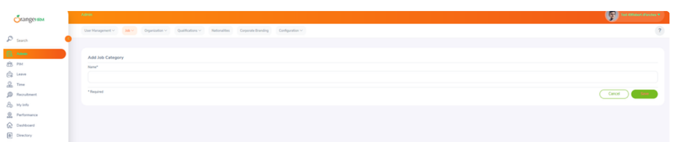


Figure 5.4

A list of Job Category as shown in Figure 5.5 would appear once a “Job Category” is added. To view or edit Job Category details, click on “Edit” icon under “Actions” column next to “Job Category” name. You may also add multiple entries of Job Categories.

Figure 5.5

To delete a Job Category click on the “Delete” icon under “Actions” column next to the “Job Category” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete Selected” as shown in Figure 5.6.

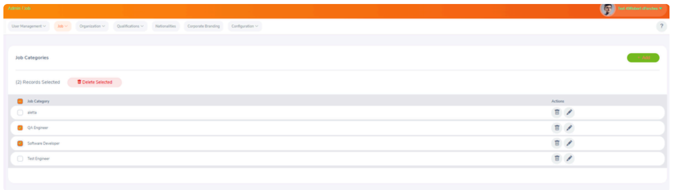


Figure 5.6

3.2.2.4 Work Shifts

In this feature the HR Admin can define work shifts for an individual or a group of employees. To add an entry, go to **Admin>> Job>> Work Shifts** and click “Add” and a screen as shown in Figure 5.7 would appear.

Click “Save” once the fields are added.

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

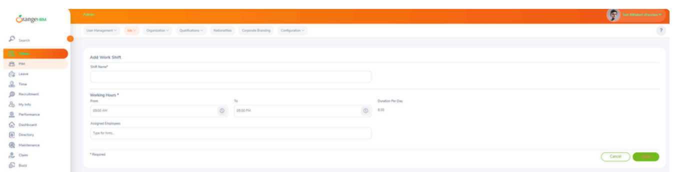


Figure 5.7

A list of work shifts as shown in Figure 5.8 would appear once a “Work Shift” is added. To view Work Shift details, click on “Edit” icon under “Actions” column next to “Work Shift” name. You may also add multiple entries of work shifts.

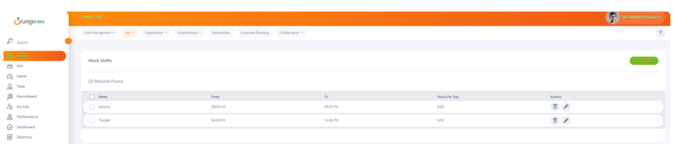


Figure 5.8

To delete a work shift click on the “Delete” icon under “Actions” column next to the “Work Shift”” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete Selected”.

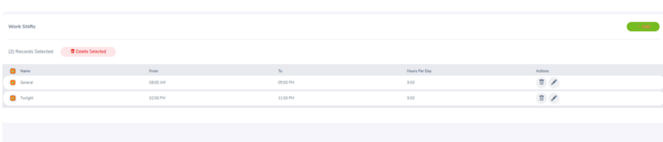


Figure 5.9

3.2.3 Organization Module

All information about the organization, the structure and locations are defined here.

The dropdown consists of three options:

- General Information.
- Locations.
- Structure.

3.2.3.1 General Information

Basic details of the company can be entered on this screen. By default, the fields are prefilled and disabled. To start adding information, go to **Admin>> Organization>> General Information** and click "Edit" toggle button.

Click "Save" once fields are entered as shown in Figure 6.0.

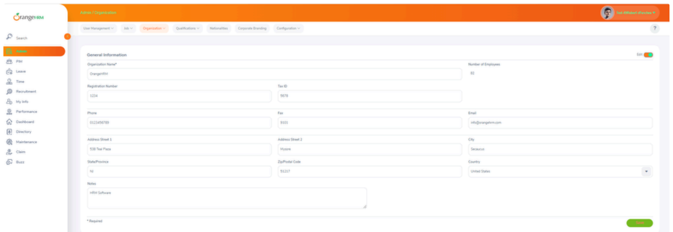


Figure 6.0

3.2.3.2 Locations

Under Locations, the HR admin can add details of sites and branches of the company. You are also able to track the number of employees working for a particular location

To add a location go to **Admin>>Organization>>Location** and click "Add" and the screen as shown in Figure 6.1 would appear.

Click "Save" once the required fields are added.

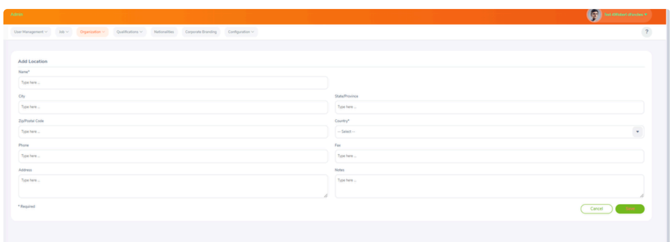


Figure 6.1

Once a location is added, it will be listed as shown in Figure 6.2. You may also enter multiple locations. You may view location details by clicking on "Edit" icon under "Actions" column next to "Location Name".

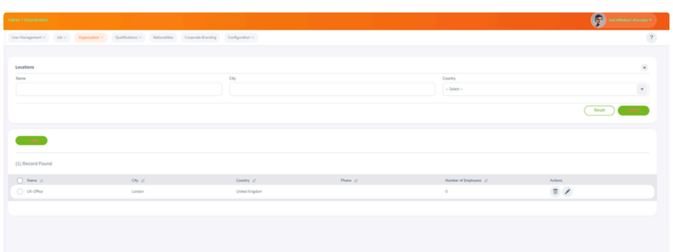


Figure 6.2

To delete a location click on the "Delete" icon under "Actions" column next to the location name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete Selected".

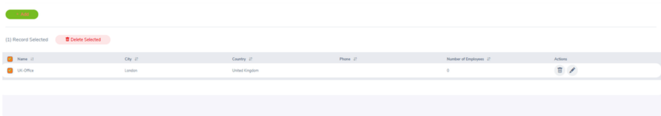


Figure 6.3

Also, user can be search for locations by: Name, City and Country. a Reset button is also available to reset the search criteria as shown in Figure 6.4

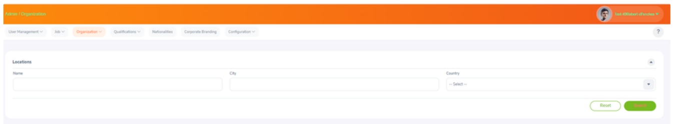


Figure 6.4

3.2.3.3 Structure

This feature allows the admin to define the hierarchy of the company by defining sub units. Since the parent company is already defined in the General Information, it would automatically appear in the Company Structure screen.

To add a unit to the company structure, go to **Admin>> Organization>> Structure** and click on “Edit”-->”Add” as shown in Figure 6.5 and the screen shown in Figure 6.6 would appear.

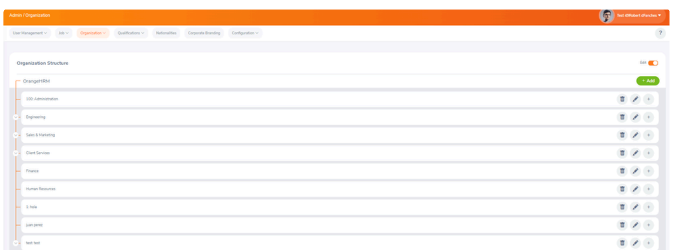


Figure 6.5

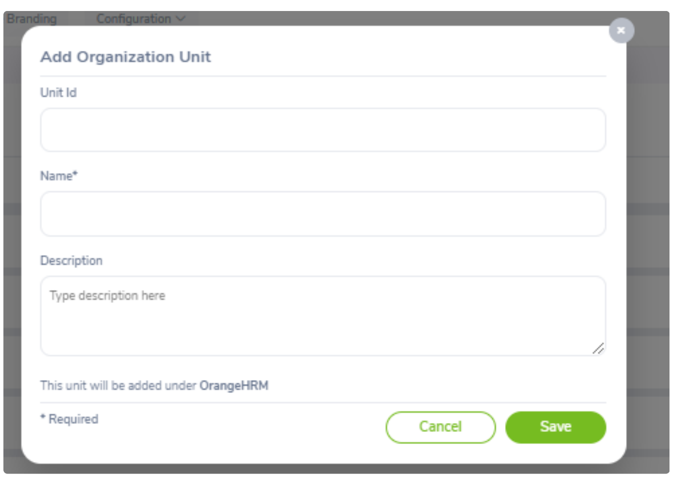


Figure 6.6

Once you have entered the field, click “Save” and the Unit will appear.

You may also add further sub-units by clicking [+] option next to the relevant fields to indicate the hierarchy levels of the company and create a pyramidal structure of your organization as shown in Figure 6.7.

Figure 6.7

To delete an entry, you can simply click “Delete icon” next to the relevant sub units. You can also collapse/expand the sub-units by clicking on the ( ) and ( ) on the left hand side of the sub-units to further view the company structure hierarchy.

3.2.4 Qualifications Module

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

- Skills
- Education
- Licenses
- Languages
- Memberships

3.2.4.1 Skills

You can define various sets of skills which can be later used on the PIM Module. To add an entry go to **Admin>> Qualifications>> Skills** and click “Add” and a screen as shown in Figure 6.8 would appear. Click “Save” once the fields are added.

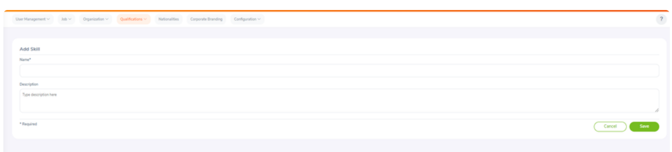


Figure 6.8

A list of skill(s) as shown in Figure 6.9 would appear once a “Skill” is added. You may also add multiple entries of skills.

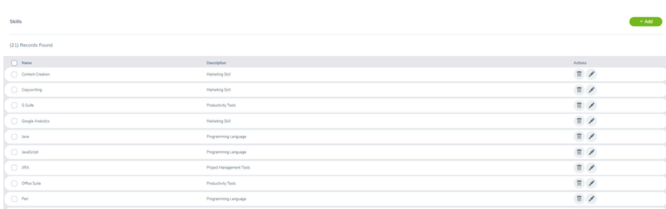


Figure 6.9

To delete a skill click on the Delete icon next to the “skill” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete Selected” as in Figure 7.0.

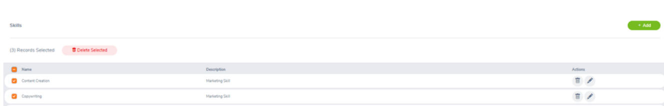


Figure 7.0

To edit a skill click on the Edit icon next to the “skill” name.

3.2.4.2 Education

You can define various types of educational qualifications which can be later used in the PIM Module. To add an entry select **Admin>> Qualifications>> Education** and click "Add", a screen as shown in Figure 7.1 would appear. Click "Save" once the field is added.

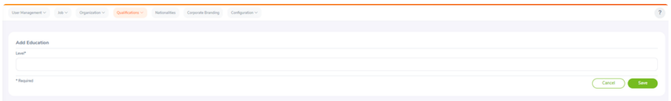


Figure 7.1

A list of education as shown in Figure 7.2 would appear once an "Education" entry is added. You may also add multiple entries of educations.

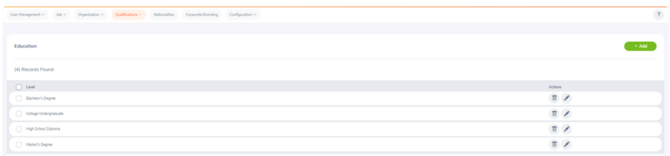


Figure 7.2

To delete an education click on the Delete icon next to the "education" name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete Selected" as in Figure 7.3.

Figure 7.3

To edit an education click on the Edit icon next to the "education" name.

3.2.4.3 License

You can define various types of licenses which can be later used in the PIM Module. To add an entry go to **Admin>> Qualifications>> Licenses** and click "Add", a screen as shown in Figure 7.4 would appear. Click "Save" once the field is added.

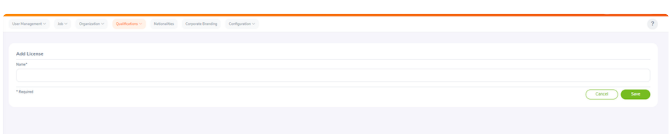


Figure 7.5

A list of license type(s) as shown in Figure 7.6 would appear once a "License" type is added. You may also add multiple entries of licenses.

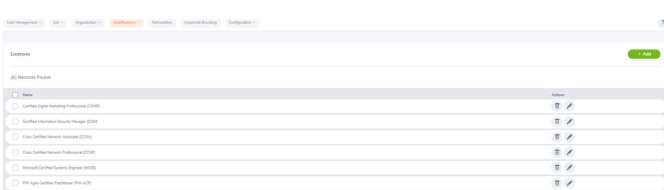


Figure 7.6

To delete a license click on the Delete icon next to the “license” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete Selected” as in Figure 7.7.

Figure 7.7

To edit a license click on the Edit icon next to the “license” name.

3.2.4.4 Languages

Different types of languages that employees in your company speak can be defined here and can be used in The PIM Module later. To add an entry, go to **Admin>> Qualifications>>Languages** and click “Add”, a screen as shown in Figure 7.8 would appear. Click “Save” once the field is added.

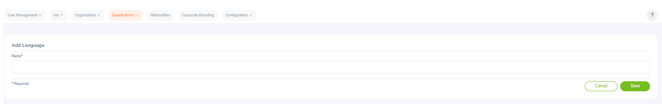


Figure 7.8

A list of languages as shown in Figure 7.9 would appear once a “Language” type is added. You may also add multiple entries of languages.

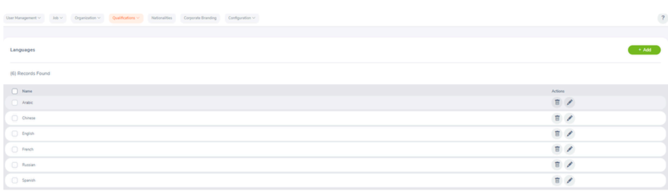


Figure 7.9

To delete a language click on the Delete icon next to the “language” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete Selected” as in Figure 8.0.

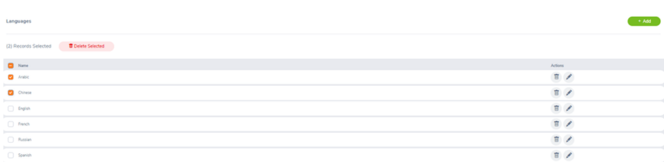


Figure 8.0

To edit a language click on the Edit icon next to the “language” name.

3.2.4.5 Memberships

This feature allows the HR Admin to define different membership details of the employees which can be later used in the PIM Module. To add a membership, go to **Admin>> Qualifications>> Membership** and click “Add”, a screen as shown in Figure 8.1 would appear.

Click “Save” once the field is added.

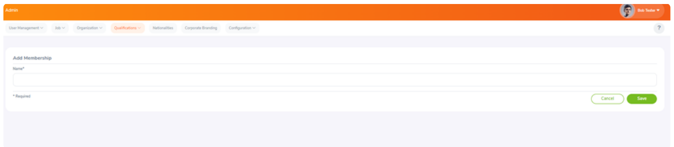


Figure 8.1

A list of membership(s) as shown in Figure 8.2 would appear once a “Membership” is added. To view membership details, click on “Membership” name. You may also add multiple entries of memberships.

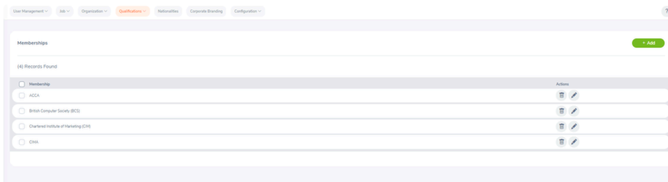


Figure 8.2

To delete a membership click on the Delete icon next to the “membership” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete Selected” as in Figure 8.3.

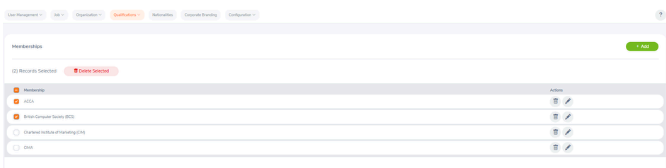


Figure 8.3