OrangeHRM

Administrator's User Manual for OrangeHRM Version 2.7

HR for ALL

OrangeHRM

Contents

1.0 Audience

This document is intended as a complete guide for using OrangeHRM 2.7. This document is specially designed for non-specialists; specialists may find the document a useful point of reference. By reading this guide, you will learn how to use OrangeHRM through the elements of the graphical user interface and what's behind some of the advanced features that are not always obvious at first sight. It will hopefully guide you around some common problems that frequently appear for users of OrangeHRM.

2.0 Supported Environment

2.1 Minimum Hardware Requirements

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

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

2.2 Software Requirements

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

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

3.0 Installing OrangeHRM

Step 1: Install the environment for OrangeHRM

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

OR

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

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

Step 2: Download OrangeHRM

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

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

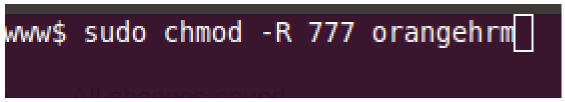
Step 3: Installation Process

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

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

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

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

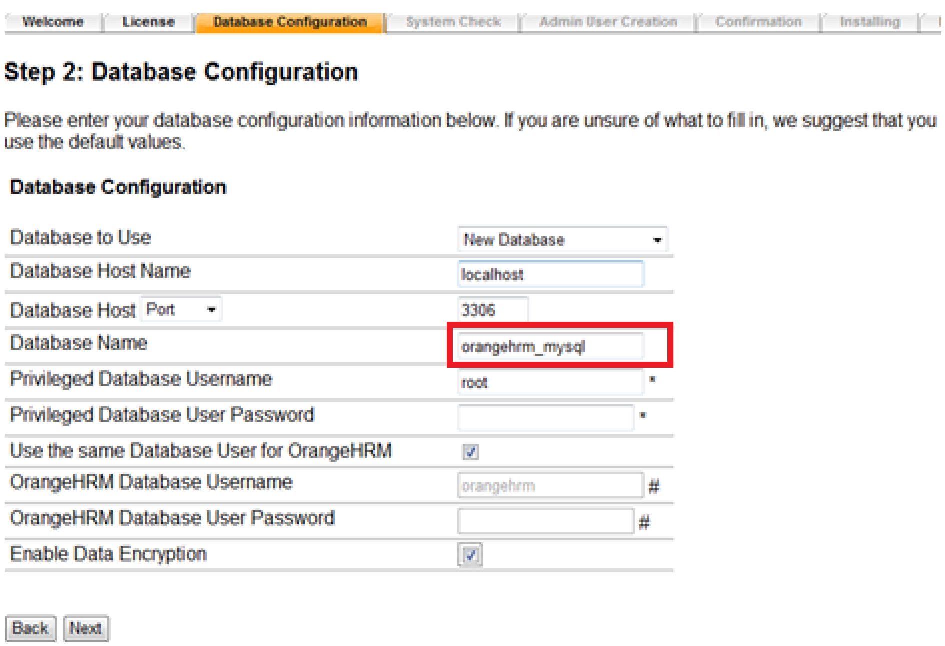


Copy and paste the name of the OrangeHRM version that you have downloaded in the following URL:
[***http://localhost/orangehrm***](http://localhost/orangehrm)

OR

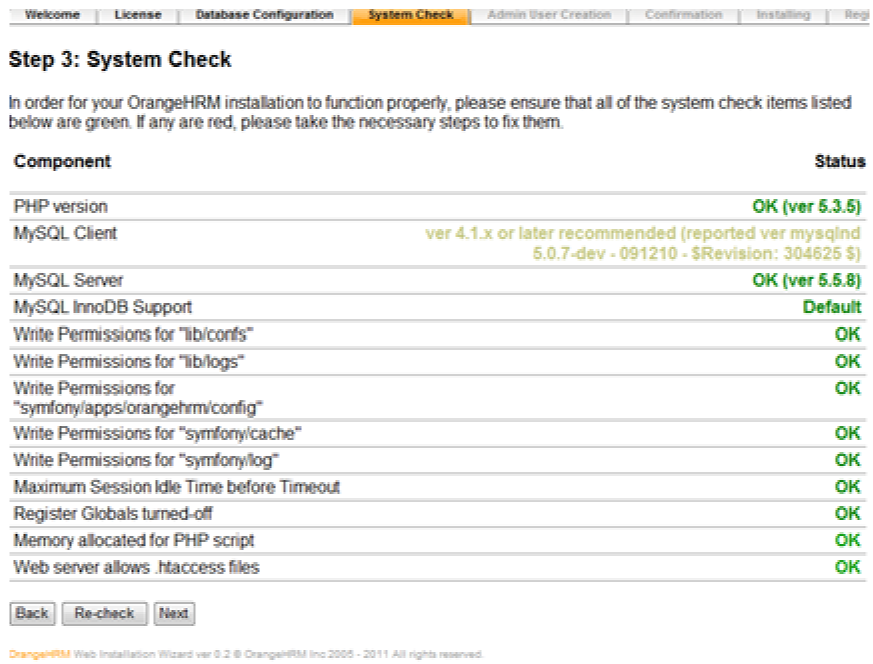
Type the IP address of your PC instead of the localhost.
Click "**Next**" to begin the OrangeHRM installation.
Step 4: Click "**I accept**" to agree and proceed with the installation.

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



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

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



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

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

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

Step 3: Login to the OrangeHRM System

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

4.0 The System

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

Figure 1.0: Login Panel

5.0 Admin Module

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

- Define the company hierarchy, pay grades, work shifts, projects, memberships, qualifications etc.
- Add other administrators, and set access levels for each user
- Handle security issues
- Configure email notifications
- Configure language localization and date format that will be reflected throughout the whole system.
- Enable/Disable Module display

The Admin Module is the central control of the system and setting it up accurately is important for smooth operation.

The Admin Module consists of:

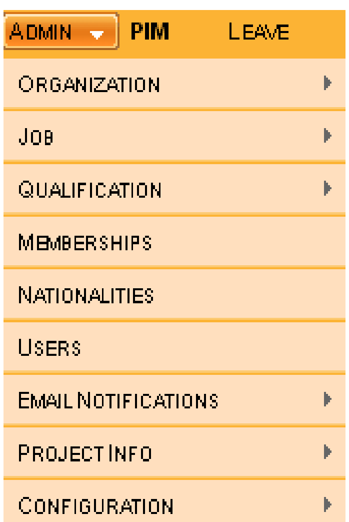


Figure 1.2: Admin Module

Organization: Allows the HR admin to enter/store general company info, structure of the organization and locations of sites.

Job: Allows the HR admin to define job titles, specifications, pay grades, employment status, job categories and work shifts.

Qualification: Define various skills set, education background, license types and languages.

Membership: Define various membership types and membership details

Nationalities: Define different nationalities

Users: Add multiple HR Admin who will control the system, create logins for general users through ESS Users.

Email Notifications: Configure all email notifications.

Project Info: Add customers, projects, project administrators and project activities.

Configuration: Configure language localization and enable/disable module display.

5.1 Organization

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

General Information

Basic details of the company can be entered on this screen. To start adding information go to **Admin>> Organization>> General Information** and click "Edit".

Click "Save" once fields are entered as shown in Figure 1.3

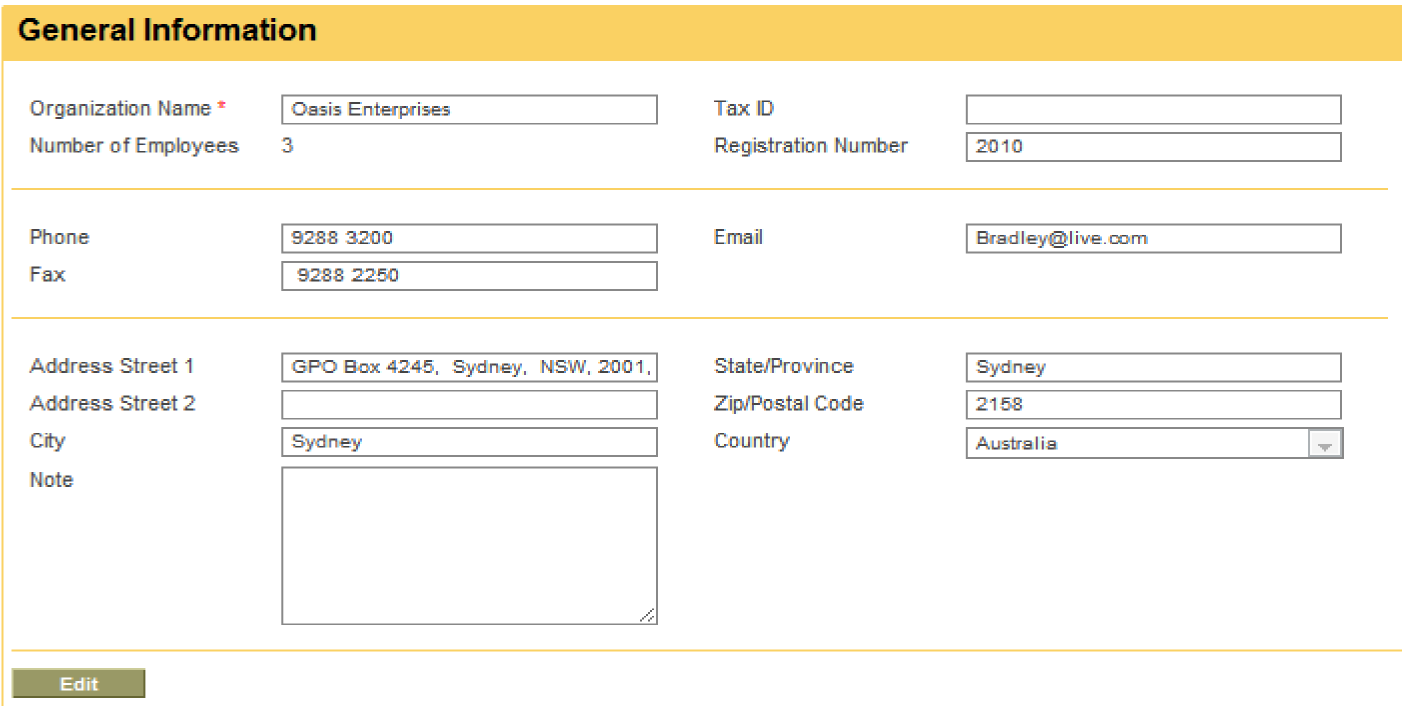


Figure 1.3: General Information

Locations

Under Locations, the HR admin can add details of sites and branches of the company. You are also able to track the number of employees working for a particular location once employees are tagged to the locations when building up the PIM Module.

To add a location go to **Admin>>Organization>>Location** and click "Add" and the screen as shown in Figure 1.4 would appear.

Click "Save" once the fields are added.

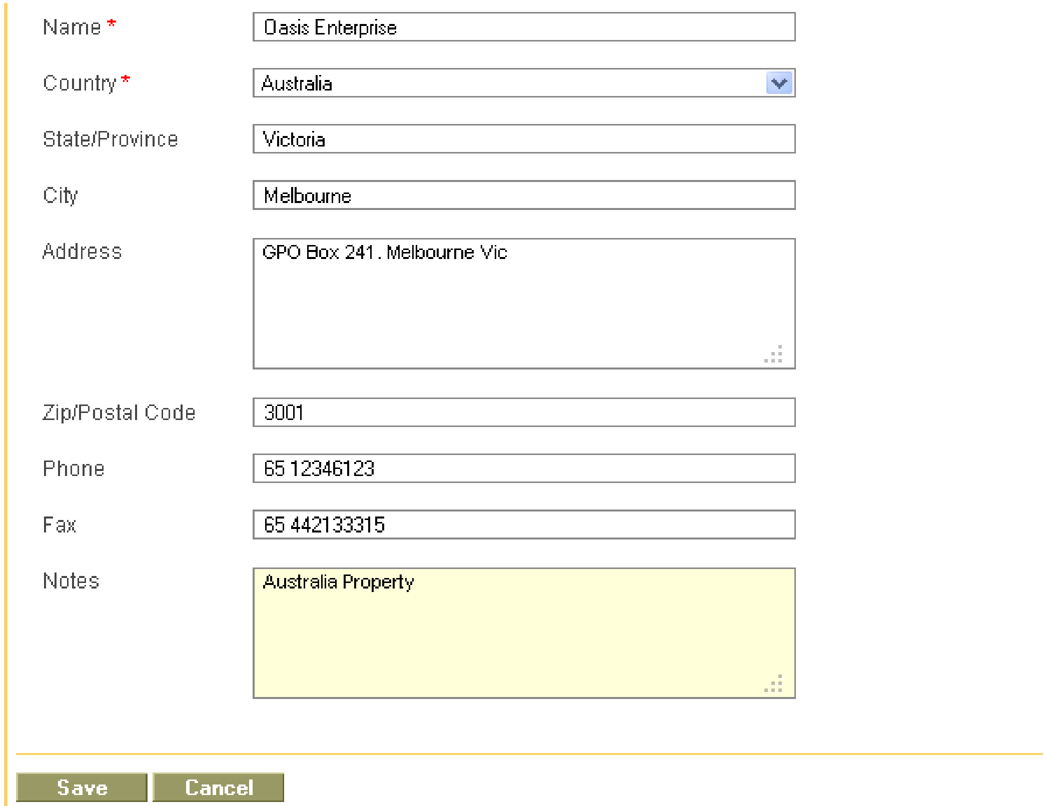


Figure 1.4: Add Location

Once a location is added, it will be listed as shown in Figure 1.5. You may also enter multiple locations. You may view location details by clicking on "Location Name".

	Name	City	Country	Phone	Number of Employees
☐	Oasis Enterprises	Melbourne	Australia	65 12346123	1
☐	Oasis Enterprises- City Branch		United Kingdom		2

Figure 1.5: Location List

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

Structure

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

*Note: You need to define the company name of the parent company before you create the Company Structure.

To add a sub- unit to the company structure, go to **Admin>> Organization>> Structure** and click on [+] as shown in Figure 1.6 and the screen shown in Figure 1.7 would appear.

Figure 1.6: Add Sub-Unit

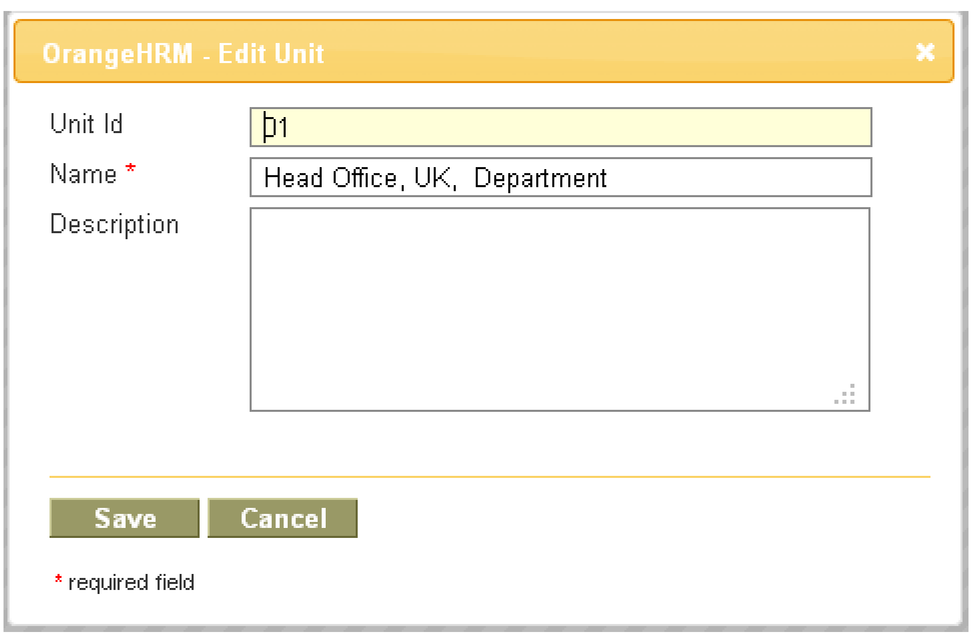


Figure 1.7: Sub- Unit Details

*Note: Company Structure may be defined according to the company's specifications and hierarchy. When entering the fields, you need to specify if the sub-unit is a Department, Division or Team.

Once you have entered the field, click "Save" and the Sub-Unit will appear as shown in Figure 1.8

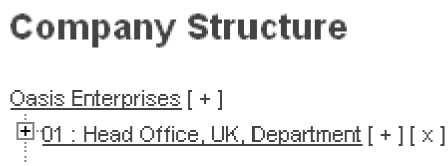


Figure 1.8: Sub-Unit Structure

You may also add further sub-units by clicking [+] option next to the relevant fields to indicate the hierarchy levels of the company and create a pyramidal structure of your organization as shown in Figure 1.9.

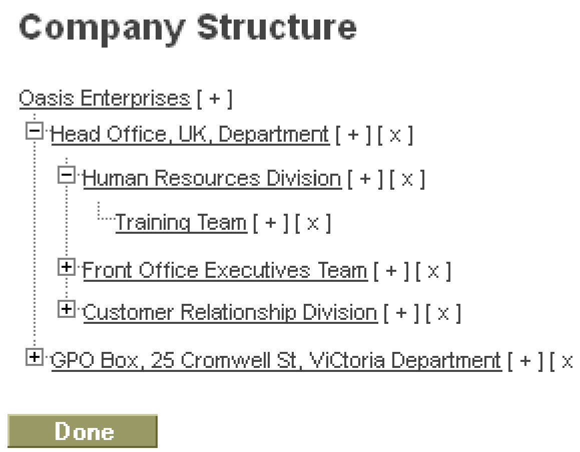


Figure 1.9: Company Structure Hierarchy

To delete an entry, you can simply click "[x]" next to the relevant sub units. Click "Done" below the screen to save the information. You can also collapse/expand the sub-units by clicking on the (-) and (+) on the right hand side of the sub-units to further view the company structure hierarchy.

5.2 Job

All information with regards to jobs of the company can be defined in this feature. The sub menu consists of the following items:

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

Job Titles

The job titles specific to the company can be defined in this option. To add an entry, go to **Admin>> Job>> Job Titles** and click “Add”. A screen as shown in Figure 2.0 would appear.

Click “Save” once the fields are added.

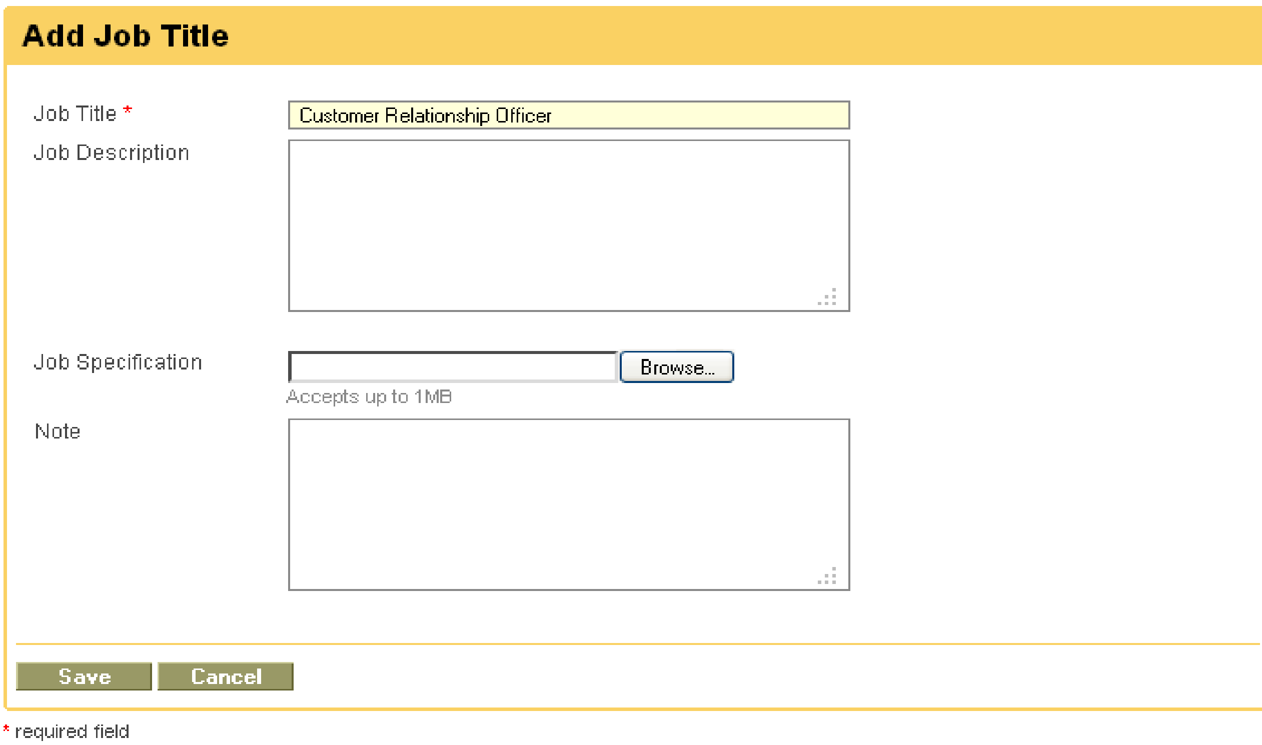


Figure 2.0: Add Job Title

A list of job title(s) will appear as shown in Figure 2.1. You may also enter multiple job titles. You may view Job Title details by clicking on “Job Title” name.

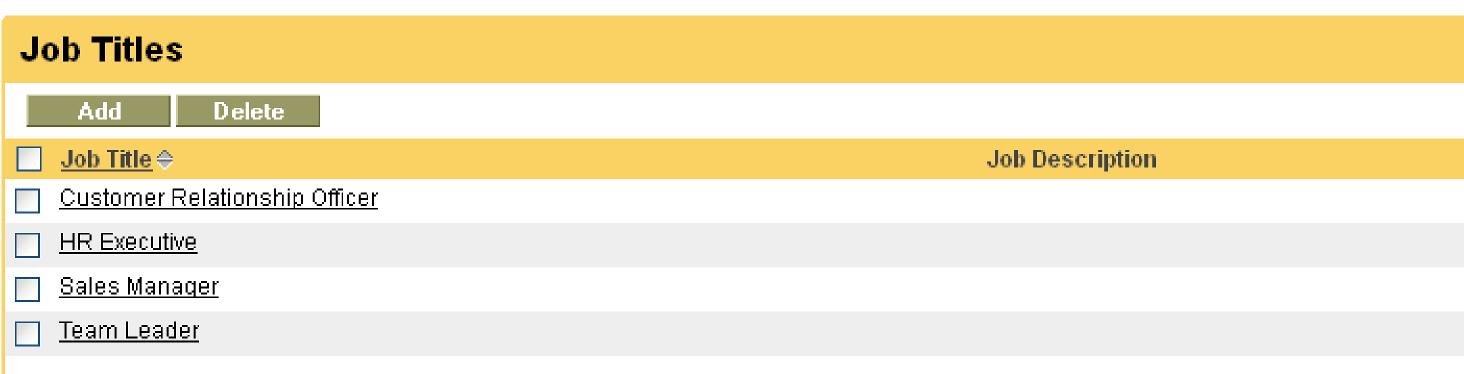


Figure 2.1: Job Title List

To delete a Job Title click on the check box next to the Job Title name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Pay Grade

The HR Admin can define the pay grade by setting a minimum salary, maximum salary, step increase, and the currency to be paid in. To add an entry, go to **Admin>>Job>> Pay Grades** and click “Add” and a screen as shown in Figure 2.2 would appear.

Click “Save” once the field is added.

Figure 2.2: Add Pay Grade

Once you click “Save” the screen in Figure 2.3 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 providing the details under “Assign New Currency”. Click “Save” to save the currency for the Pay Grade.

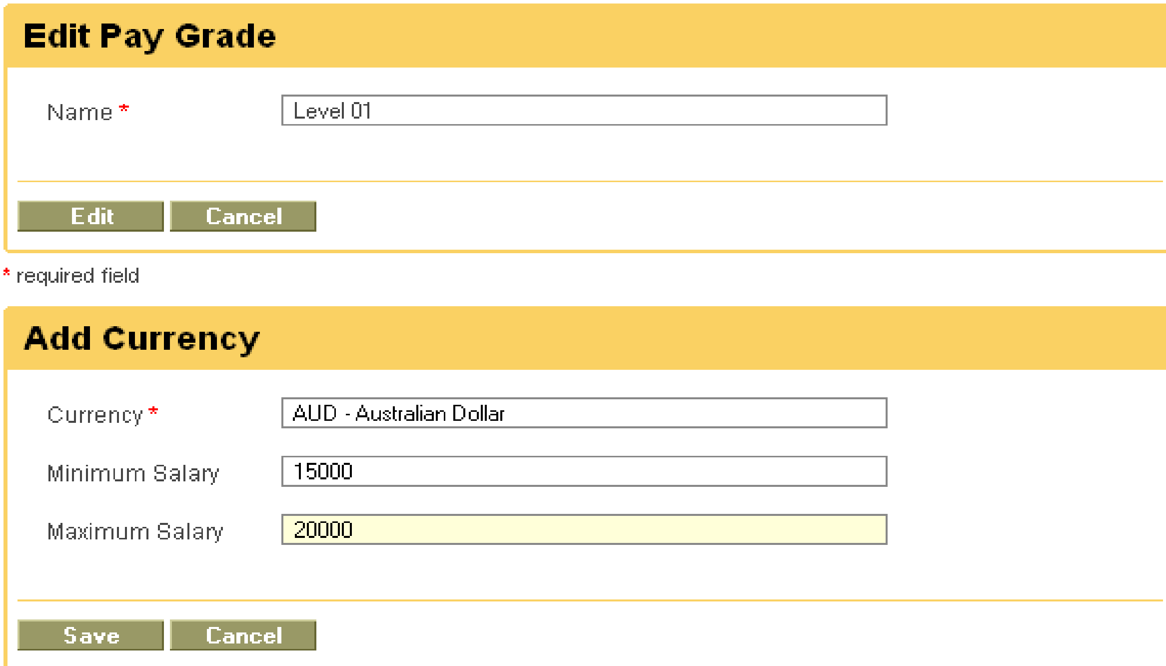


Figure 2.3: Assign Pay Grade

You can assign multiple currencies here and each currency defined will be listed as shown in Figure 2.4.

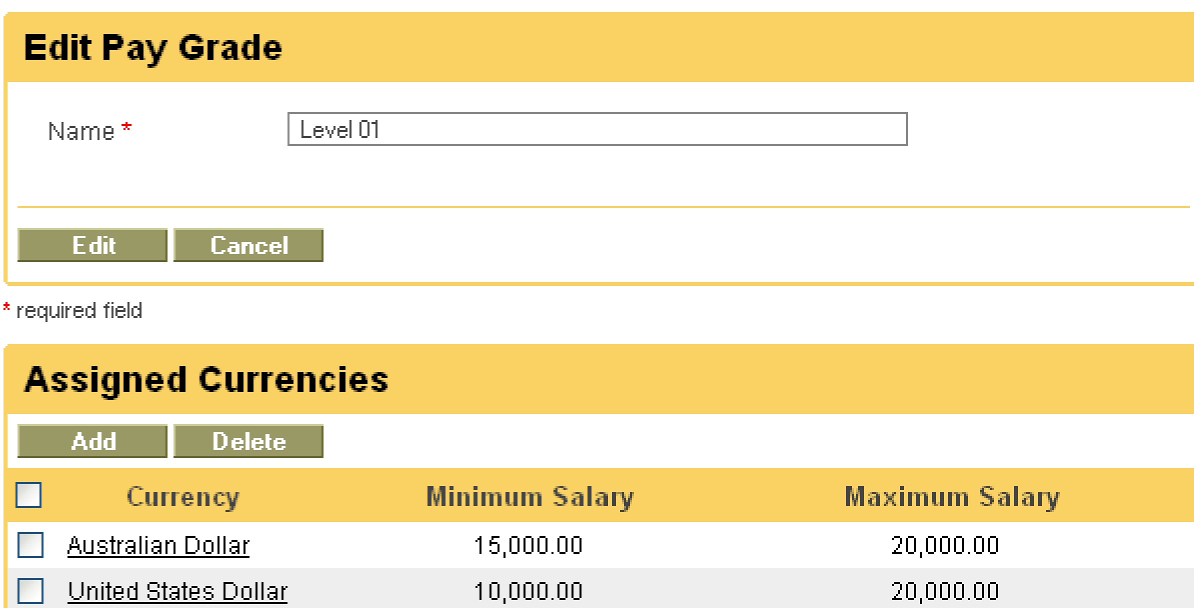


Figure 2.4: Pay Grade- Currency List

You can edit details of a particular currency by clicking on the “Currency” name.

All pay grades added will be listed as shown in figure in 2.5. To view Pay Grade details click on “Pay Grade name.

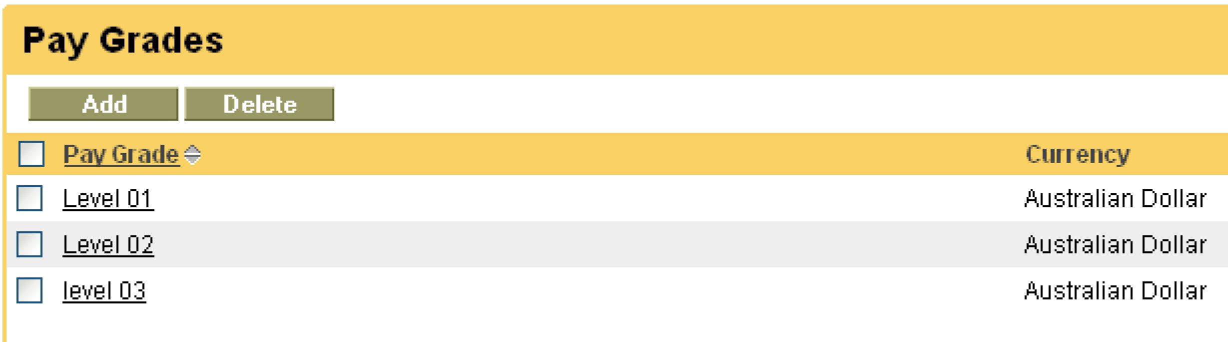


Figure 2.5: Pay Grades List

To delete a Pay Grade click on the check box next to the “Pay Grade” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Employment Status

Employment Status allows you to define the status of employment employees are hired for or if they are terminated. To add an entry, go to **Admin>> Job>> Employment Status** and click “Add” and a screen as shown in Figure 2.6 would appear.

Click “Save” once the field is added.

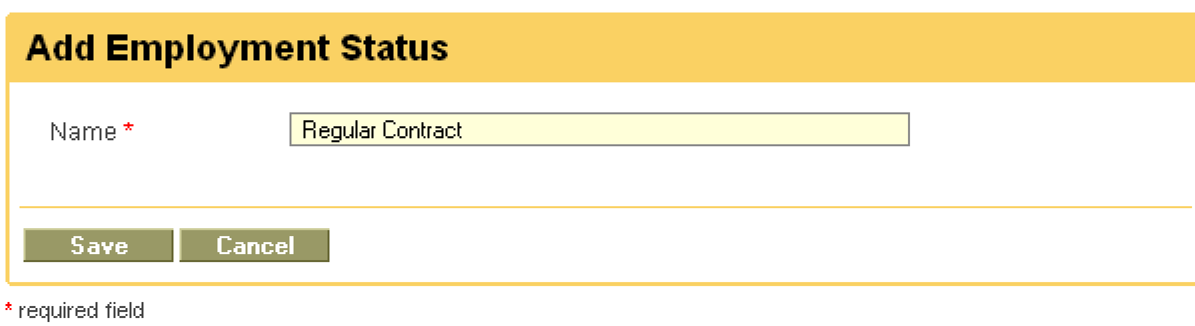


Figure 2.6: Add Employment Status

A list of Employment Status as shown in Figure 2.7 would appear once an Employment Status is added. To edit an employment status, click on the “Employment Status” name.

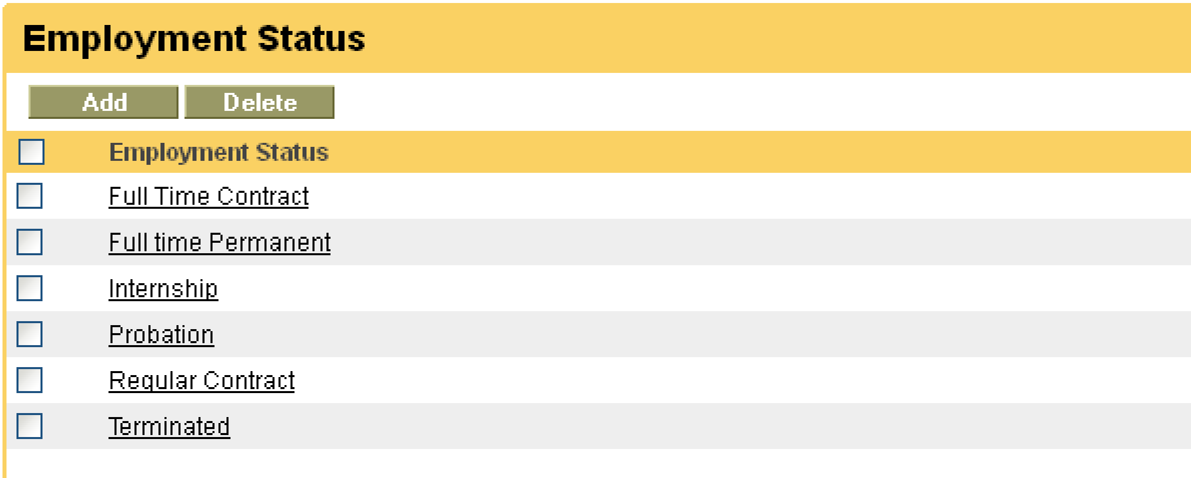


Figure 2.7: Employment Status List

To delete an Employment Status click on the check box next to the "Employment Status" name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete".

Job Categories

This feature allows the HR Admin to create job categories specific to the company to aggregate job classifications.
To add an entry, go to **Admin>> Job>> Job Categories** and click on "Add" and a screen as shown in Figure 2.8 would appear.

Click "Save" once the field is added.

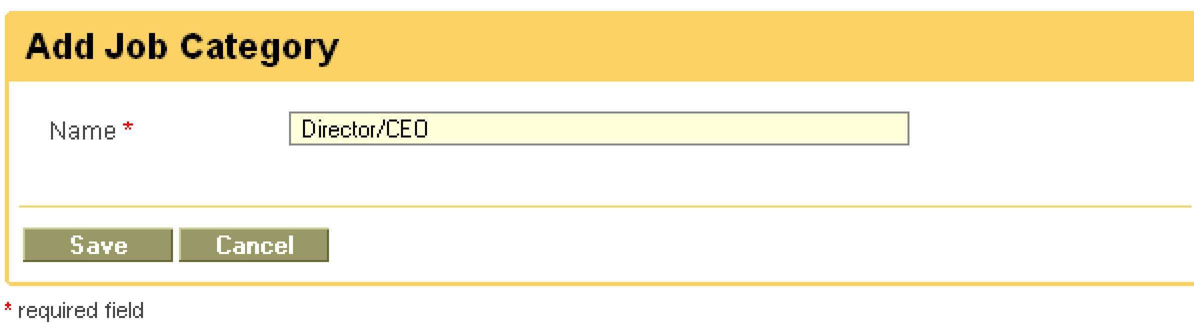


Figure 2.8: Add Job Category

A list of Job Category as shown in Figure 2.9 would appear once a "Job Category" is added. To view Job Category details, click on "Job Category" name. You may also add multiple entries of Job Categories.

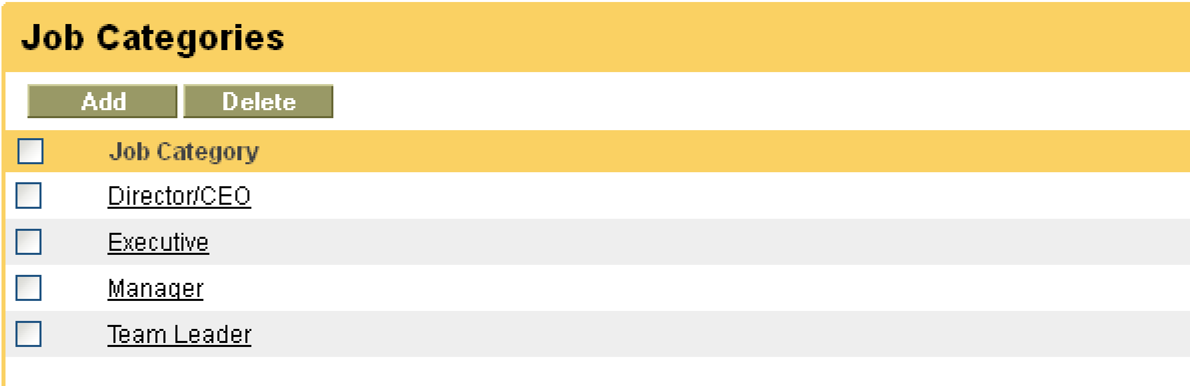


Figure 2.9: Job Category List

To delete a Job Category click on the check box next to the "Job Category" name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete".

Work Shifts

In this feature the HR Admin can define work shifts for an individual or a group of employees. To add an entry, go to **Admin>> Job>> Work Shifts** and click "Add" and a screen as shown in Figure 3.0 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.

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

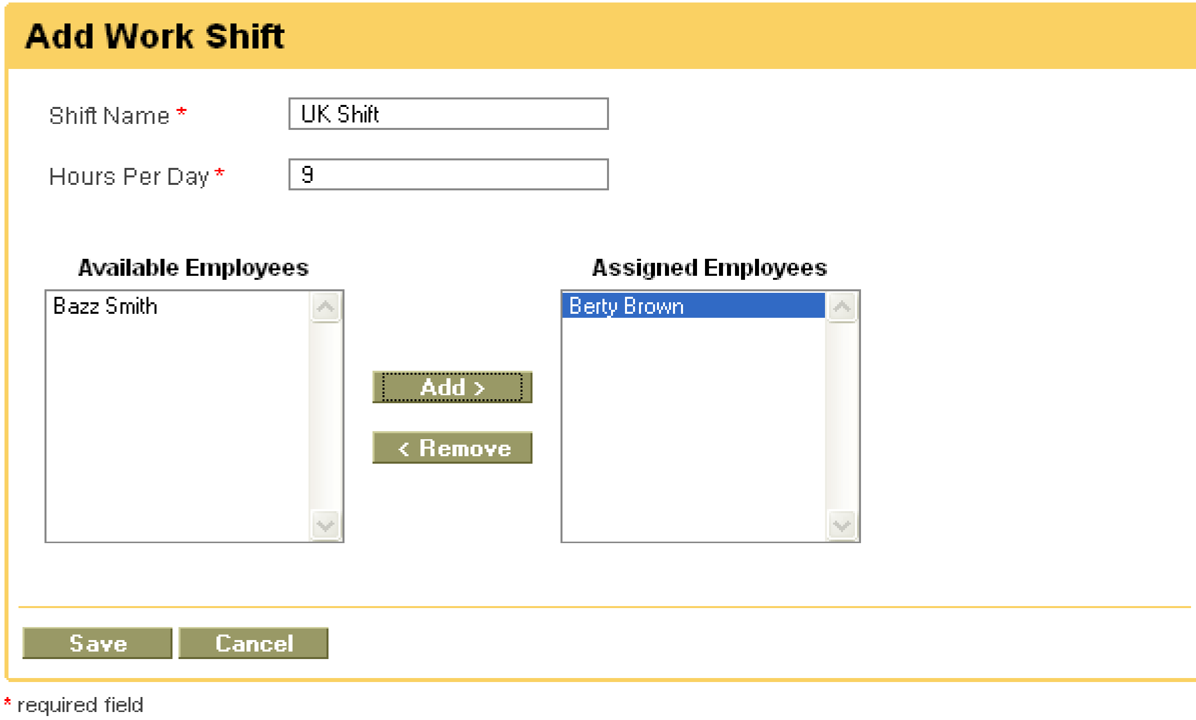


Figure 3.0: Add Work Shift

A list of work shifts as shown in Figure 3.1 would appear once a "Work Shift" is added. To view Work Shift details, click on "Work Shift" name. You may also add multiple entries of work shifts.

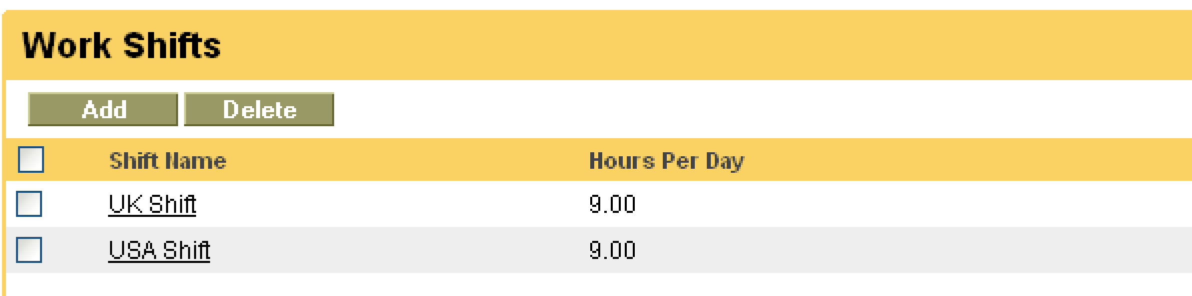


Figure 3.1: Work Shifts List

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

5.3 Qualifications

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

- Skills
- Education
- Licenses
- Languages

Skills

You can define various sets of skills which can be later used on the PIM Module. To add an entry go to **Admin>> Qualifications>> Skills** and click "Add" and a screen as shown in Figure 3.2 would appear.

Click "Save" once the fields are added.

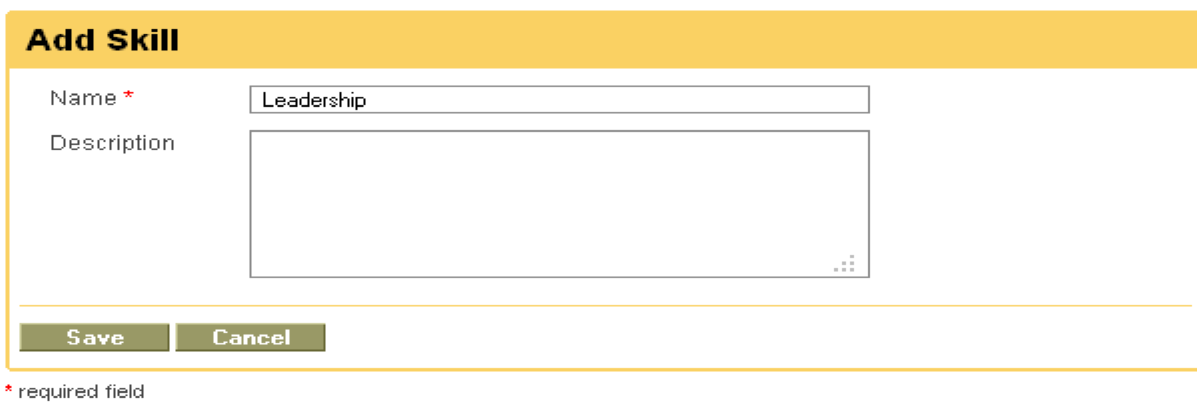


Figure 3.2: Add Skill

A list of skill(s) as shown in Figure 3.3 would appear once a "Skill" is added. You may also add multiple entries of skills.

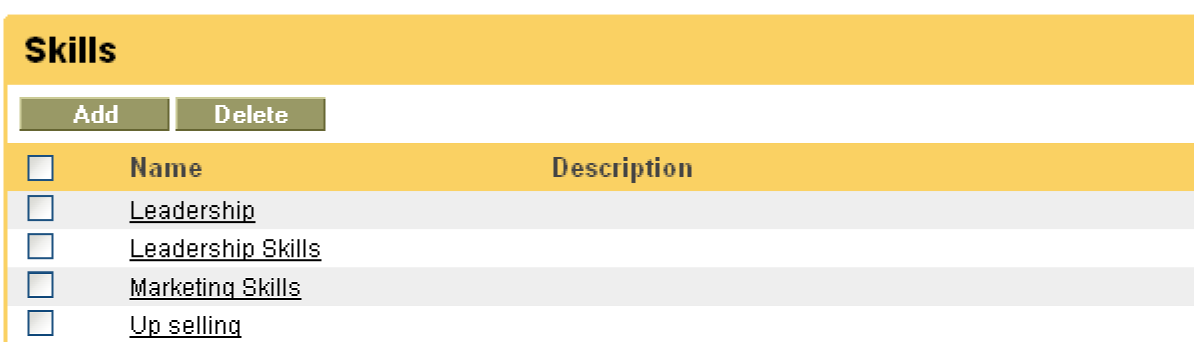


Figure 3.3: Skills List

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

Education

You can define various types of educational qualifications which can be later used in the PIM Module. To add an entry select **Admin>> Qualifications>> Education** and click “Add”, a screen as shown in Figure 3.4 would appear.

Click “Save” once the field is added.

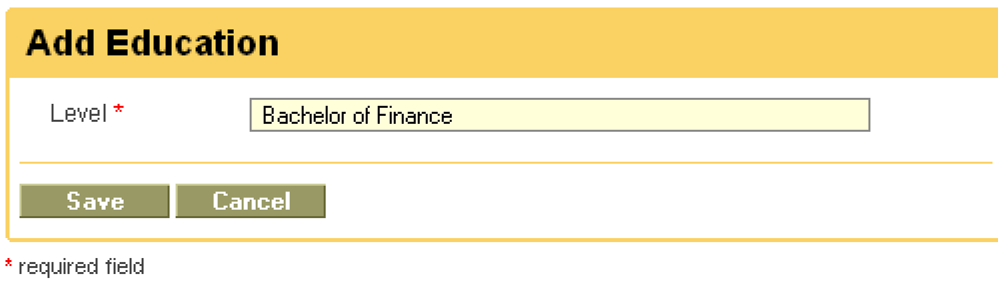


Figure 3.4: Add Education

A list of education as shown in Figure 3.5 would appear once a “Education” is added. You may also add multiple entries of skills.

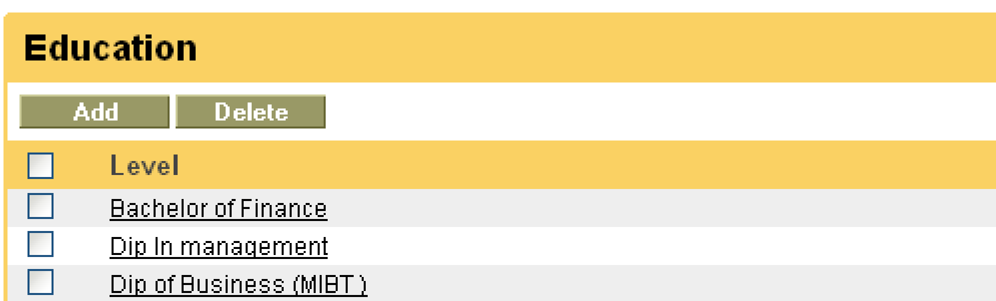


Figure 3.5: Education List

To delete education type click on the check box next to the “Education” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Licenses

You can define various types of licenses which can be later used in the PIM Module. To add an entry go to **Admin>> Qualifications>> Licenses** and click “Add”, a screen as shown in Figure 3.6 would appear.

Click “Save” once the field is added.

Figure 3.6: Add License Type

A list of license type(s) as shown in Figure 3.7 would appear once a “License” type is added. You may also add multiple entries of licenses.

Figure 3.7: Licenses List

To delete a license type click on the check box next to the “License” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Languages

Different types of languages that employees in your company speak can be defined here and can be used in The PIM Module later. To add an entry, go to **Admin>> Qualification>>Languages** and click “Add”, a screen as shown in Figure 3.8 would appear.

Click “Save” once the field is added.

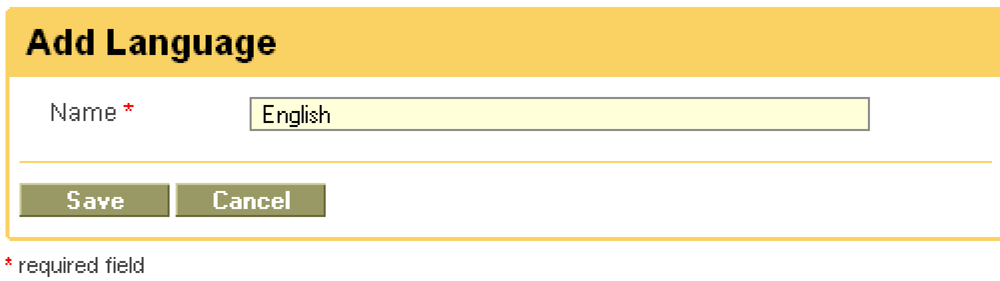


Figure 3.8: Add Language

A list of languages as shown in Figure 3.9 would appear once a “Language” type is added. You may also add multiple entries of languages.

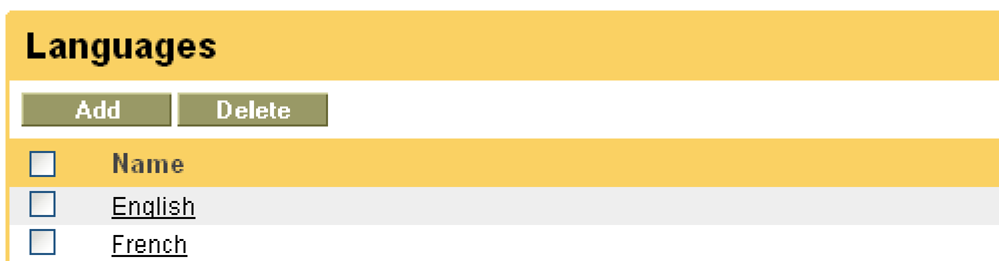


Figure 3.9: Language List

To delete language types click on the check box next to the “Language” name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

5.4 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>> Membership** and click “Add”, a screen as shown in Figure 4.0 would appear.

Click “Save” once the field is added.

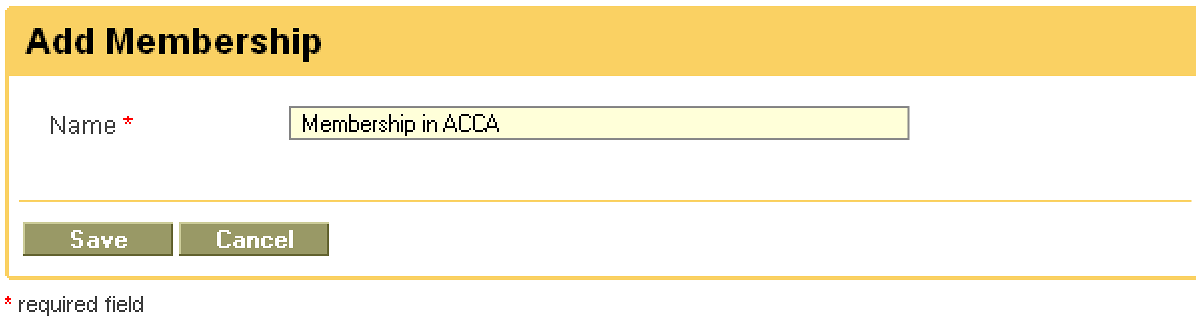


Figure 4.0: Add Membership

A list of membership(s) as shown in Figure 4.1 would appear once a “Membership” is added. To view membership details, click on “Membership” name. You may also add multiple entries of memberships.

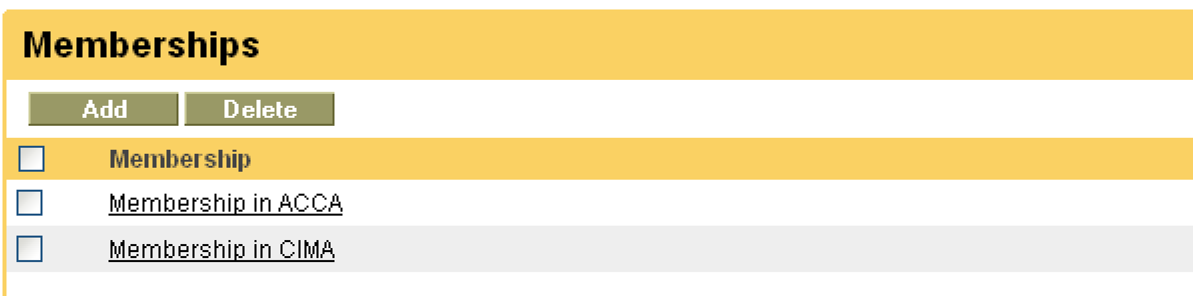


Figure 4.1: Memberships List

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

5.5 Nationalities

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

To add a nationality, go to **Admin>> Nationalities** and click “Add”, a screen as shown in Figure 4.2 would appear.

Click “Save” once the field is added.

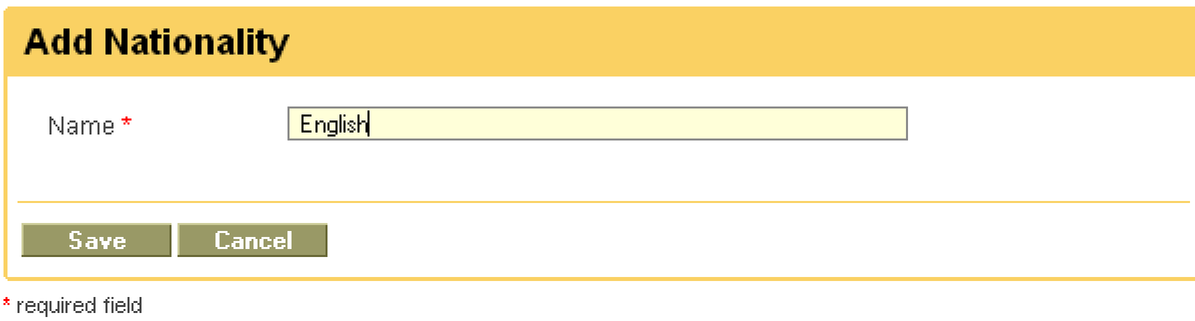


Figure 4.2: Add Nationality

A list of nationalities as shown in Figure 4.3 would appear once a “Nationality” is added. You may also add multiple entries of nationalities.

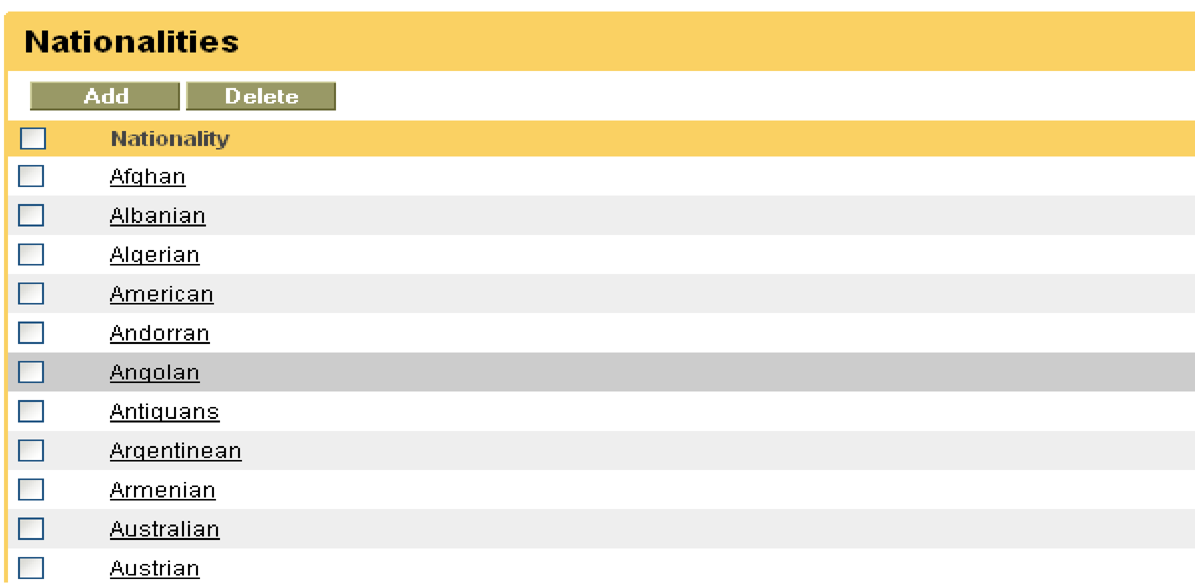


Figure 4.3: Nationalities List

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

5.6 Users

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>> Users** and click “Add”, a screen as shown in Figure 4.4 would appear.

Click “Save” once the fields are added.

***Note**: An employee list needs to be created first under the PIM Module to create user logins. Alternatively, a user login could be created when adding employees under the PIM Module *(refer to Chapter 4.3.*

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

- **User Type**: You can assign user types for each user whether they would fall under as an “Admin” or “ESS” user type to define their user rights.
    - **Admin:** have access full access to the system.
    - **ESS:** limited access to the system. It could be an ESS-Supervisor or ESS-Employee.
        1. **ESS-Supervisor**: where the user has access to his/her particulars and his/her subordinates’ particulars.
        2. **ESS-Employee**: where the user has access only to his/her particulars.
- **Employee Name**
  *If an HR Admin is an existing employee, he/she needs to be defined in the PIM Module
- **Password**
- **Confirm Password** (Re-enter the password)
- **Status** – Enabled or disabled

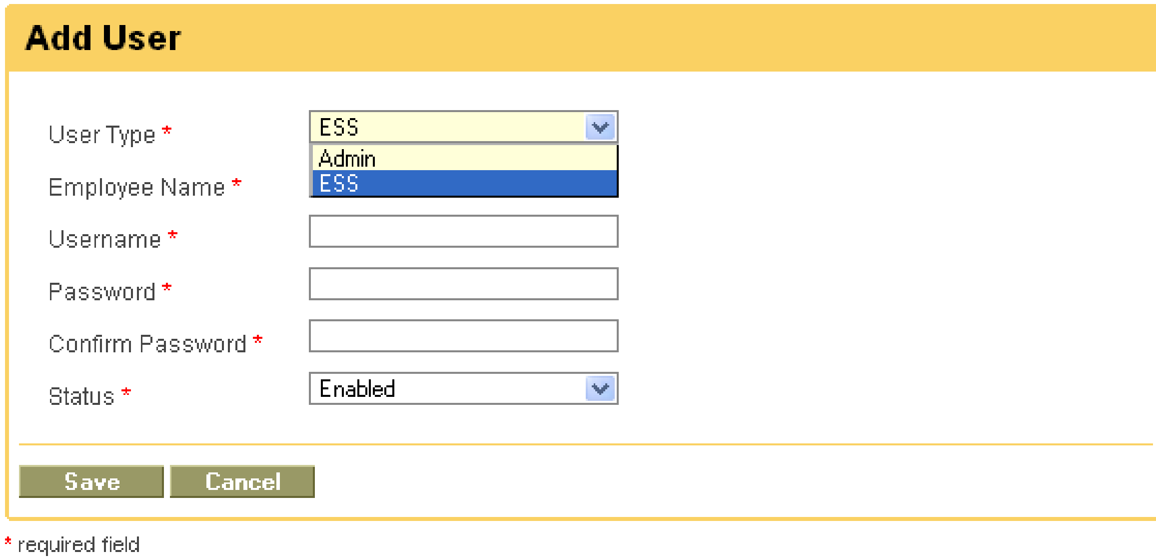


Figure 4.4: Add User

A list of user logins as shown in Figure 4.5 would appear once an entry is added. You may also add multiple entries of user logins. The default system user available will be Admin and has full access to the system.

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

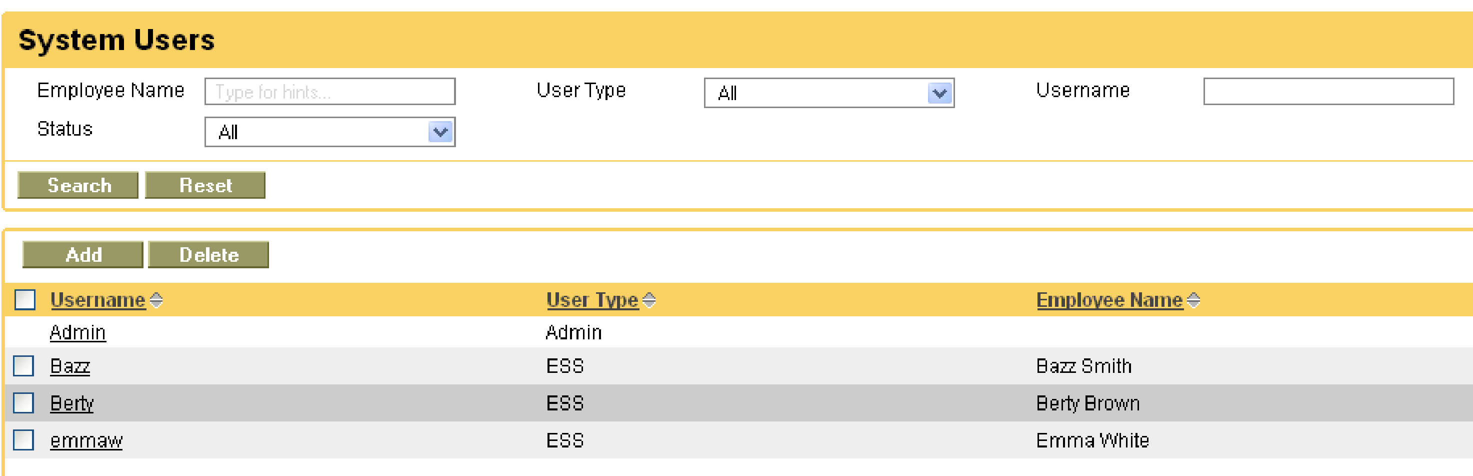


Figure 4.5: System Users List

To delete a system user, click on the check box next to the "Username". It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete".

5.7 Email Notifications

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

Configuration

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

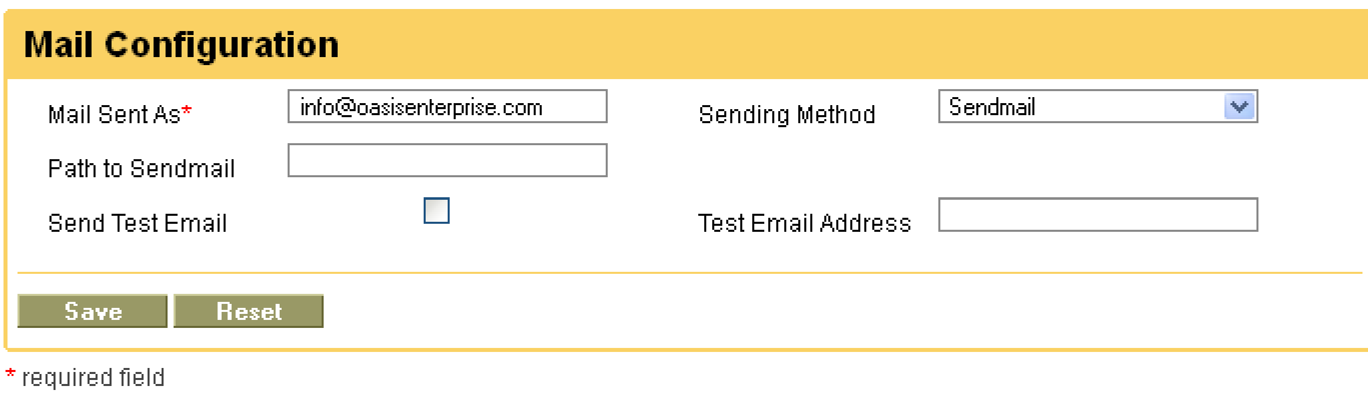


Figure 4.6: Mail Configuration

To configure the mail settings, go to **Admin>>Email Notifications>> Configuration**, a screen as shown in Figure 4.6 would appear. Enter the fields accurately and a test mail to an email address of your choice could be sent to check functionality Click “Save” when you have entered all the settings and you may check the email account if you specified an address to receive the test mail.

Subscribe

This feature will allow the admin to subscribe to email notifications that will be sent to the employees and supervisors in the system. A copy of the mail will be sent to the email address specified by the Admin. He/She can also select what copies of notifications he should receive. To subscribe to a notification type, go to **Admin>> Email Notifications>>Subscribe** and a screen a shown in Figure 4.7 would appear.

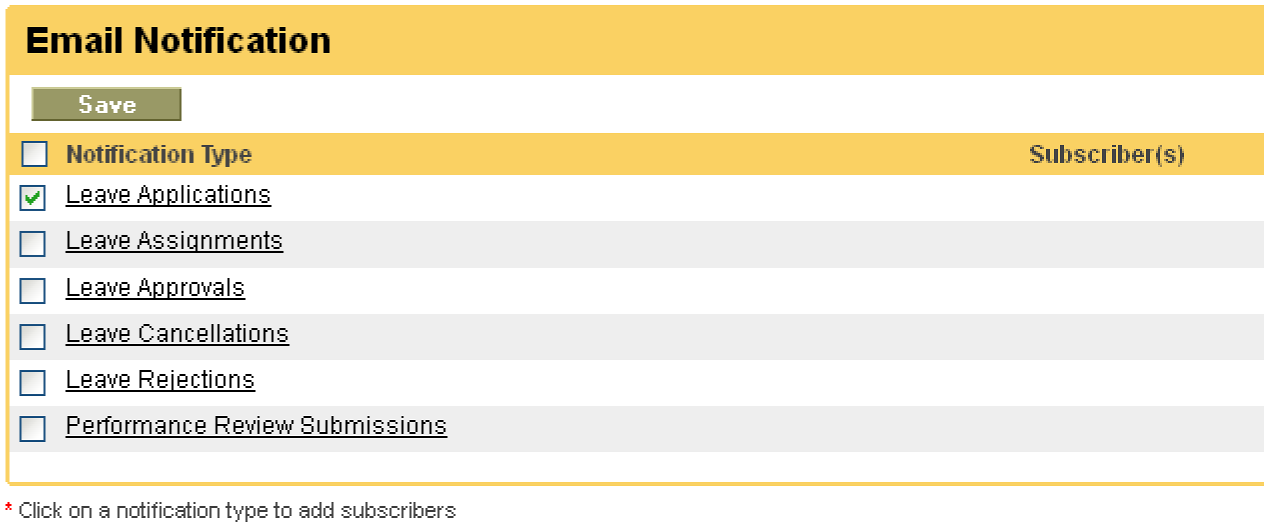


Figure 4.7: HR Admin Notification Subscription

The HR Admin may also add other subscribers to the following notifications by clicking on the notification types and you will be directed to the screen as shown in Figure 4.8. Once the fields are added, click “Save”.

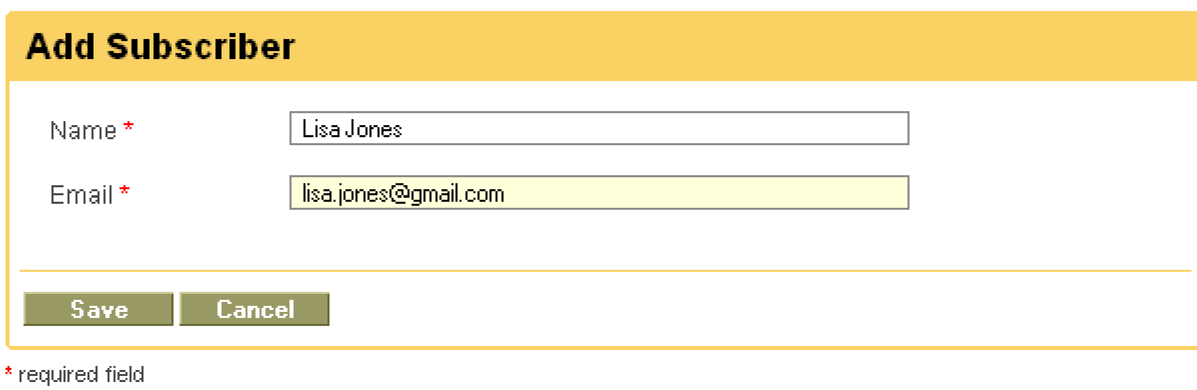


Figure 4.8: Add Subscriber

The entry will then be listed as shown in Figure 4.9 and multiple entries of subscribers for a particular notification type may also be added or deleted.

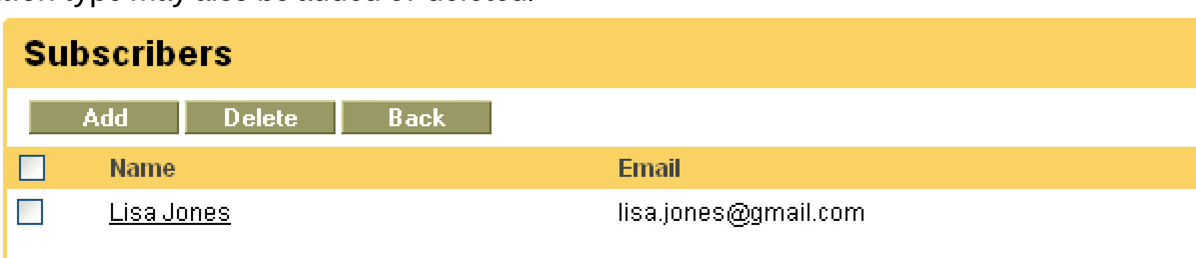


Figure 4.9: Subscriber List for a Notification Type

When you click “Back” you will be directed to the “Email Notification” screen as shown in Figure 5.0 with the added notification subscriber reflected on the screen.

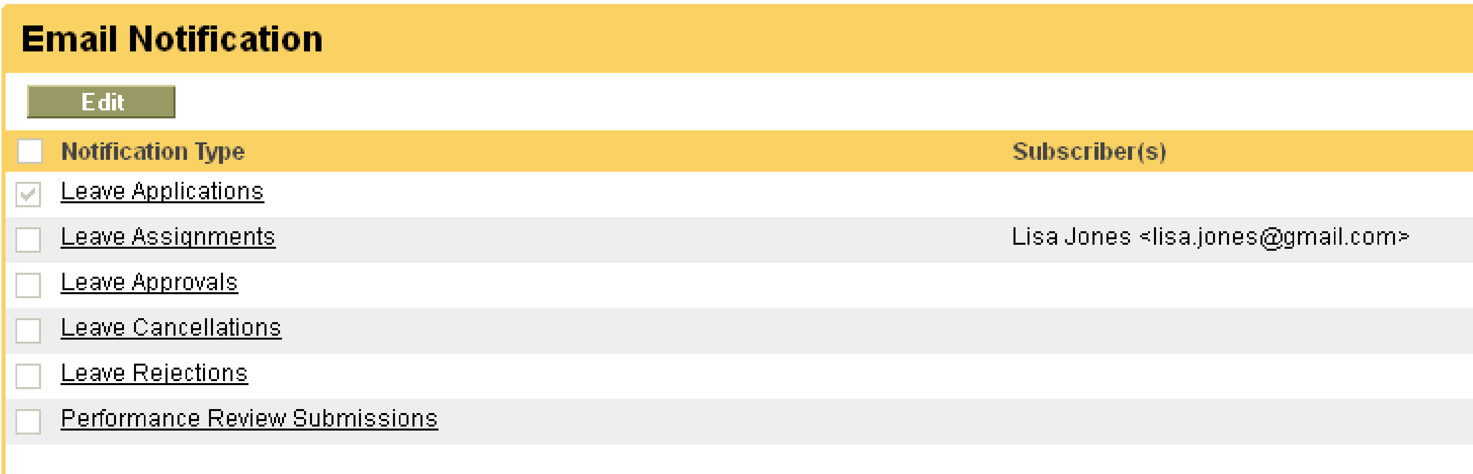


Figure 5.0: Email Notification List of Subscribers

5.8 Project Info

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

Customers

You can enter details of your customers that can be used to define projects and project activities. To add a customer, go to **Admin>> Project Info>> Customers** and click "Add", a screen as shown in Figure 5.1 would appear.

Click "Save" once the fields are added.

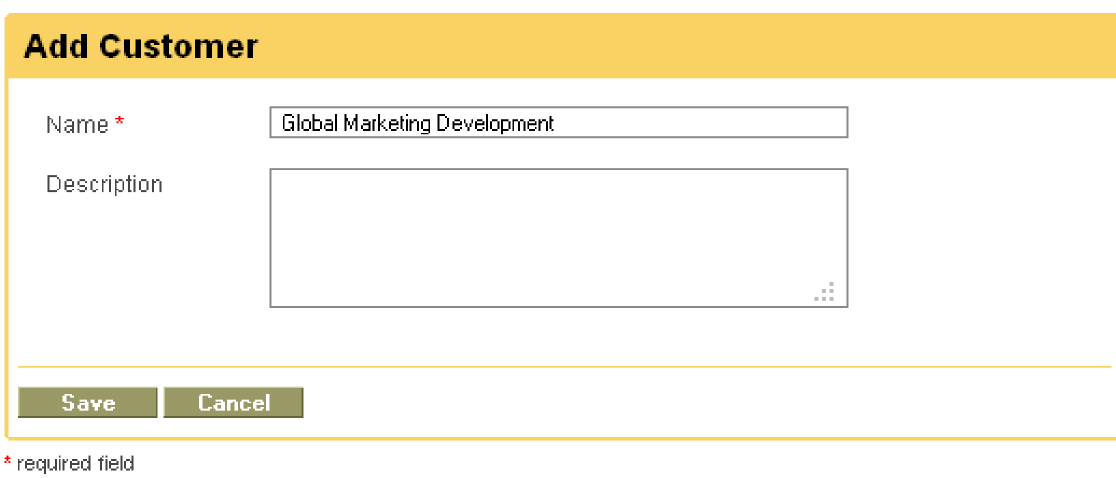


Figure 5.1: Add Customer

The customer will then be listed as shown in Figure 5.2. You may also add multiple entries of customers. To view "Customer "details click on the customer name.

Figure 5.2: Customers List

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

Projects

The administrators are able to define the projects, which were/are/will be managed by the company. To add a project, go to **Admin>> Project Info>> Projects** and click "Add", a screen as shown in Figure 5.3 would appear.

Click "Save" once the fields are added.

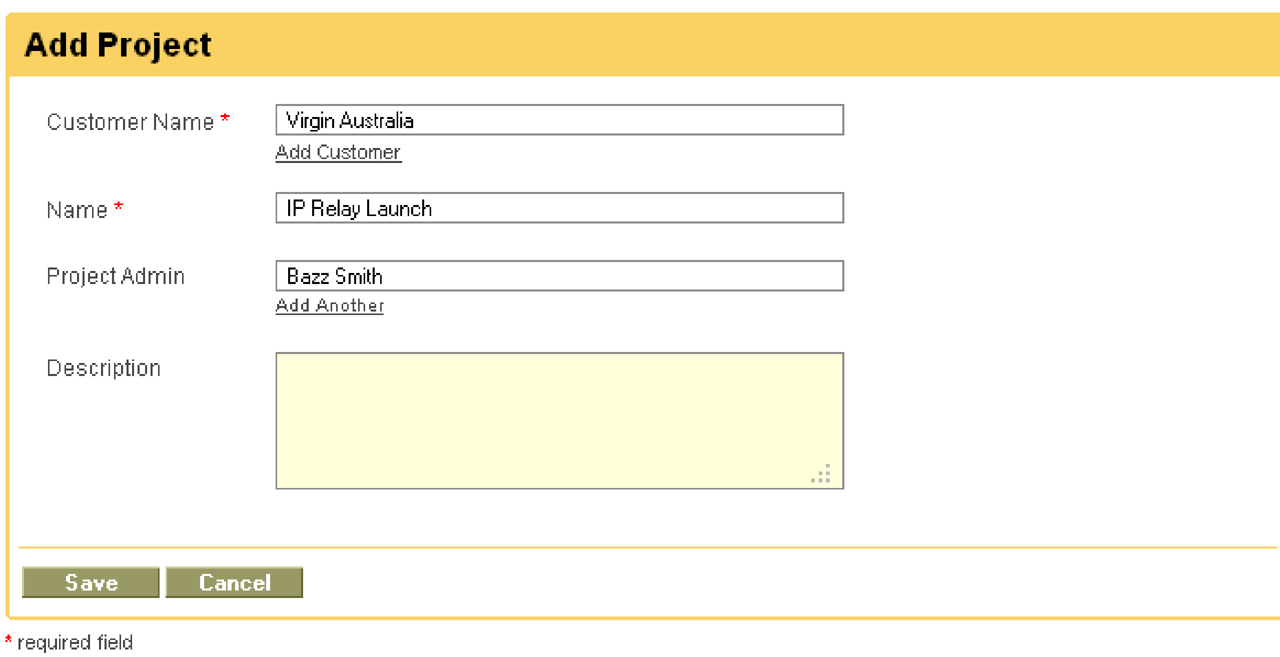


Figure 5.3: Add Project

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

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

Once you click "Save" the screen as shown in Figure 5.4 would appear and project activities can be added for the particular project. To add a project activity, Click "Add" and "Save" once the field is added.

Figure 5.4: Add Project Activities

You may also copy a project activity from another project using the "Copy From" option. To copy a project activity from another project, click "Copy From" and add the project activity that needs to be copied and click on "Copy" as shown in Figure 5.5.

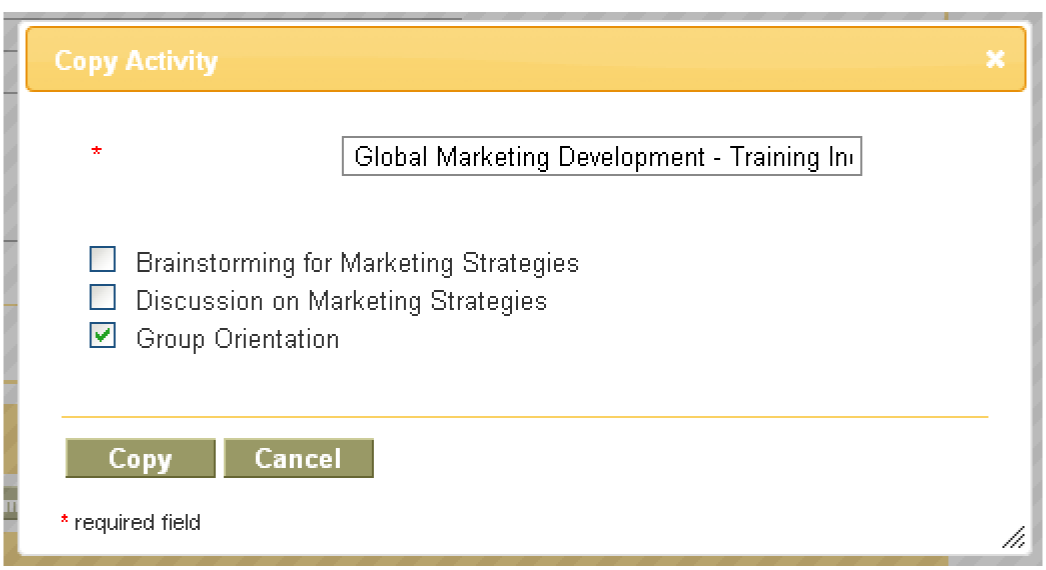


Figure 5.5: Copy Project Activity

The selected project activity will then be added to the list of project activities as shown in Figure 5.6.

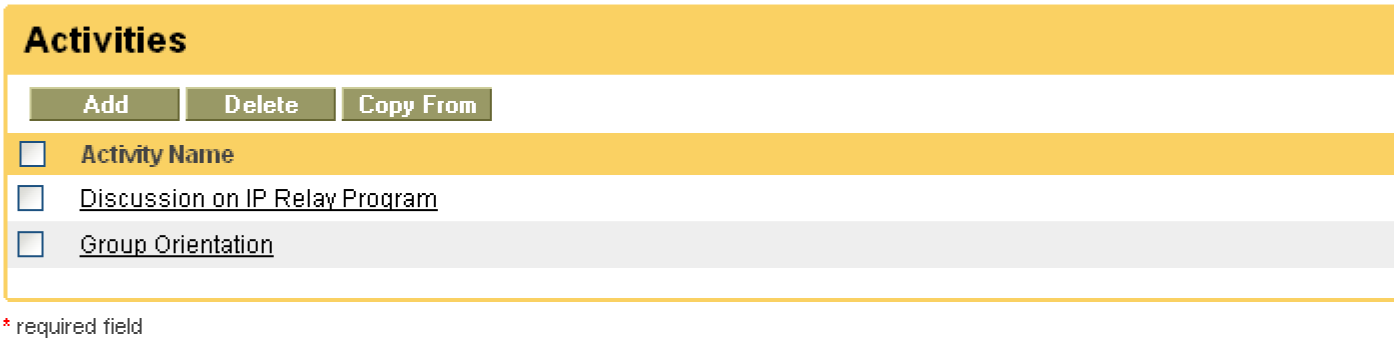


Figure 5.6: Copied Project Activity Listed

A list of projects for a particular customer will then be listed as shown in Figure 5.7. You may also add multiple entries of projects. To delete an entry, click on the check box next to the "Customer" name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete".

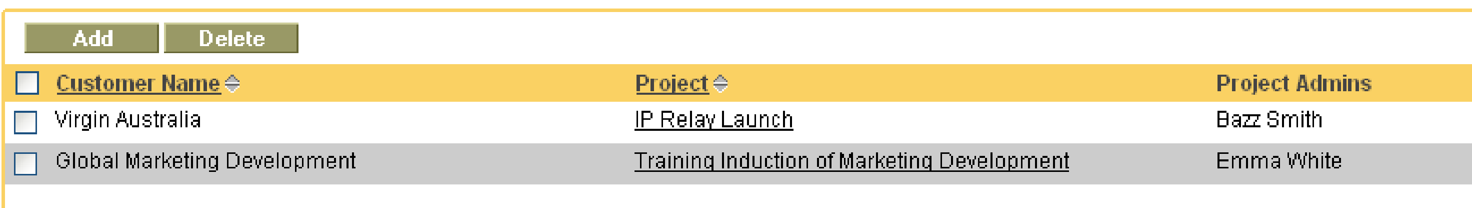


Figure 5.7: Project List

5.9 Configuration

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

Localization

Language Localization

This feature enables the HR Admin to configure the language settings and translate the OrangeHRM system to the language of your choice. To configure localization settings, go to **Admin>> Configuration>> Localization** and the screen as shown in Figure 5.8 would appear. Click "Edit" to edit the fields.

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

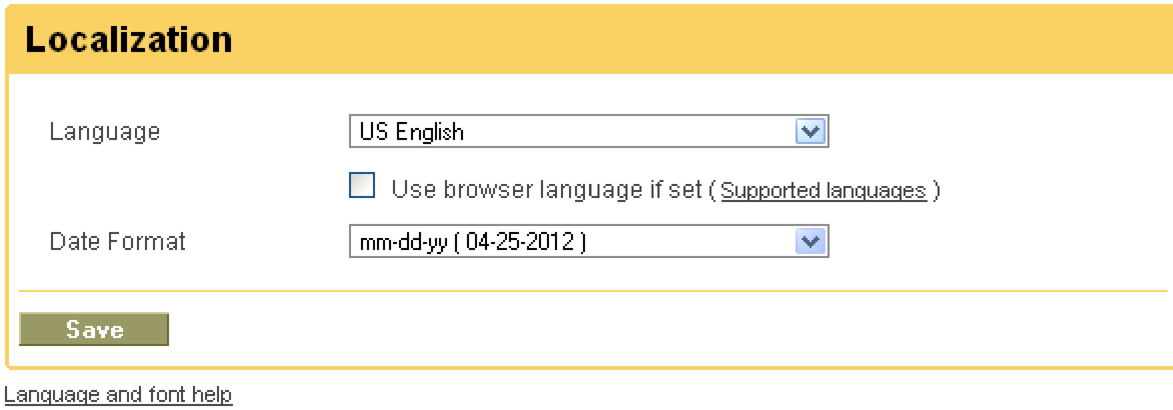


Figure 5.8: Localization

The language pack tool can also be obtained from the website by clicking on "Language and font help" as shown in Figure 5.8, where you will be diverted to the web page or by simply browsing through the OrangeHRM Website (www.orangehrm.com >> Community>> Translators).

Date Format Localization

This feature allows the HR Admin to set up the date format that will be reflected throughout the whole system as shown in Figure 5.8.

Once you have configured the localization settings, click "Save".

Modules

This feature enables the HR Admin to configure the display/hide settings of the modules of the system. To configure the module display settings, go to **Admin>> Configuration>> Modules** and the screen as shown in Figure 5.9 will appear.

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

Click "Save" one module configuration is completed.

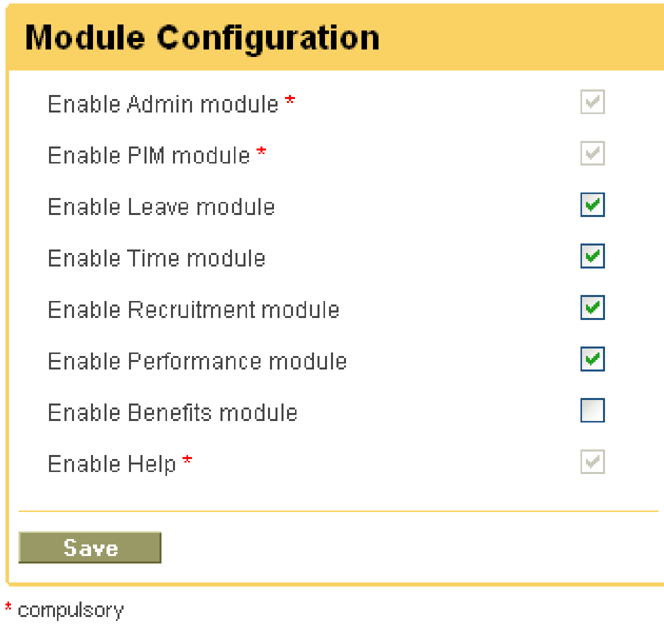


Figure 5.9: Module Configuration

6.0 PIM Module

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

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

The HR can:

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

ESS-Supervisor can:

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

ESS-Employee:

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

6.1 Configuration

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

Optional Fields

This feature allows the admin to add fields to the “Personal Details” screen that may be specific to the company or country. To configure the optional fields settings, go to **PIM>> Configuration>> Optional Fields** and the screen as shown in Figure 6.0 will appear.

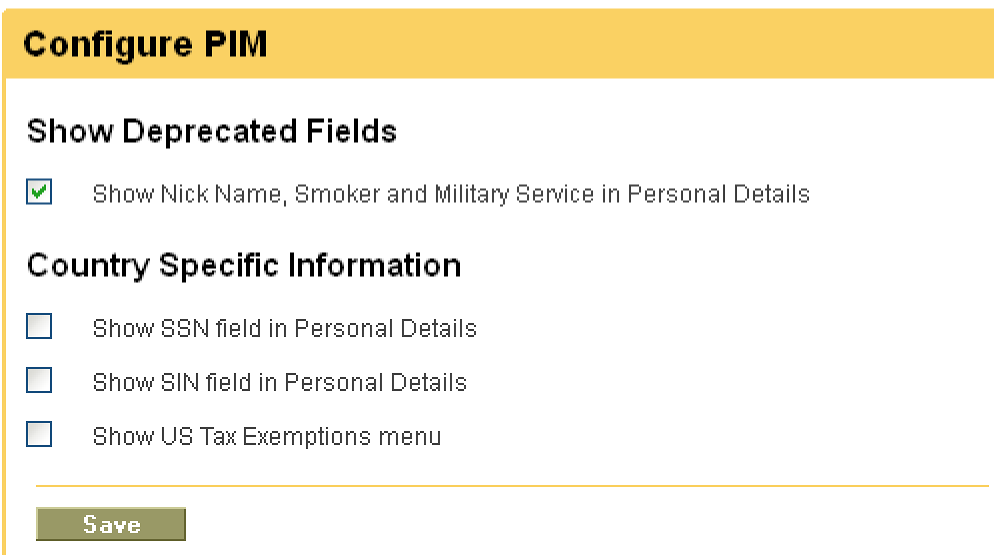


Figure 6.0: Optional Fields Configuration

You may click on the checkbox beside the field you want to add and click “Save” once the fields are selected. The field(s) selected will then be reflected under the “Personal Details” screen as shown in Figure 6.1

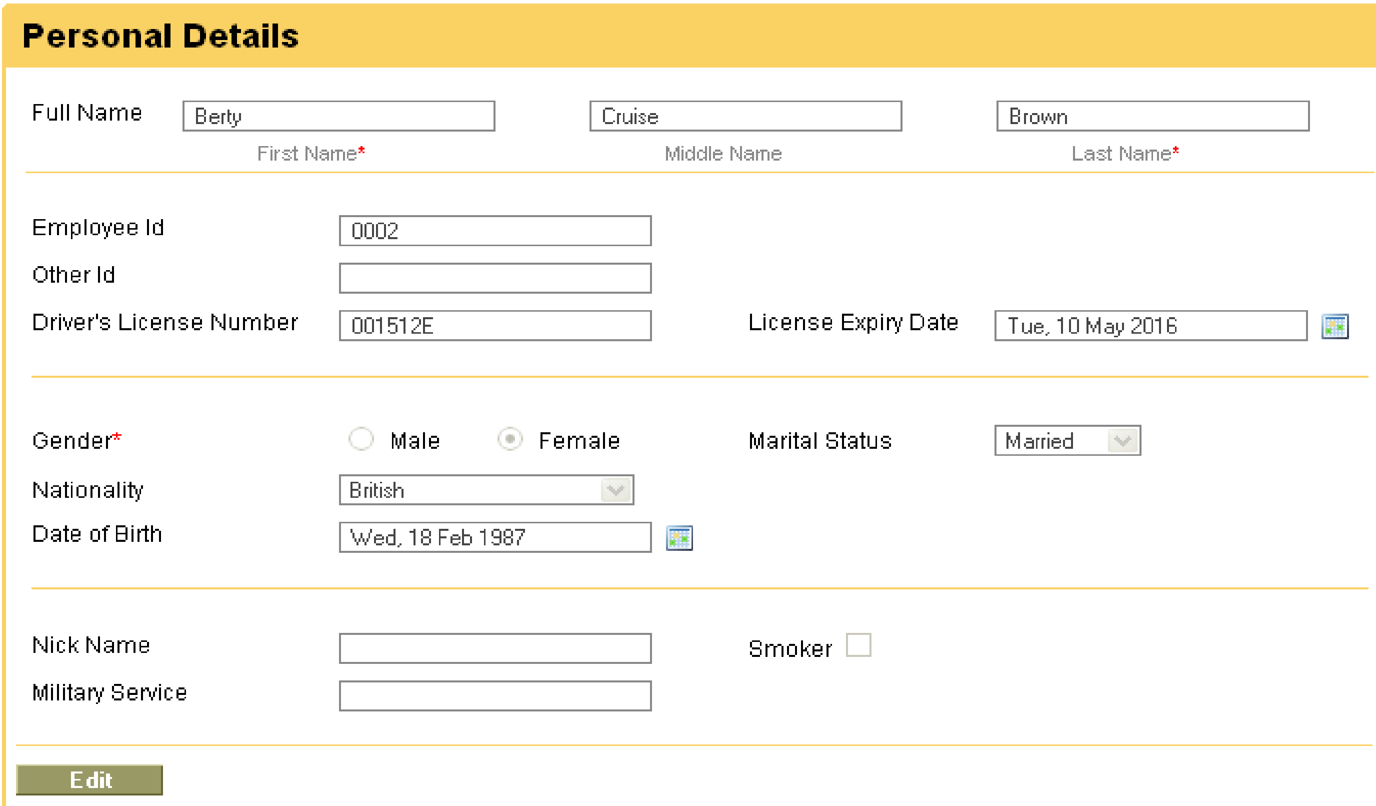


Figure 6.1: Optional Fields added to Personal Details Screen

Custom Fields

This feature allows the Admin to customize and add fields to all the screen of the PIM Module that may be specific and relevant to the company. To add a custom field, go to PIM>>Configuration>>Custom Fields, click "Add" and the screen as shown in Figure 6.2 will appear

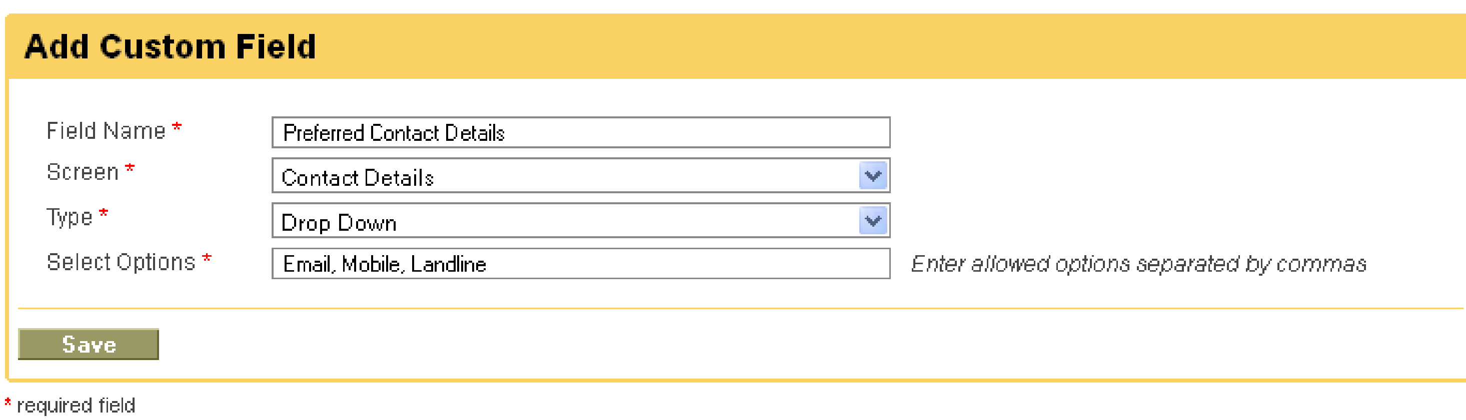
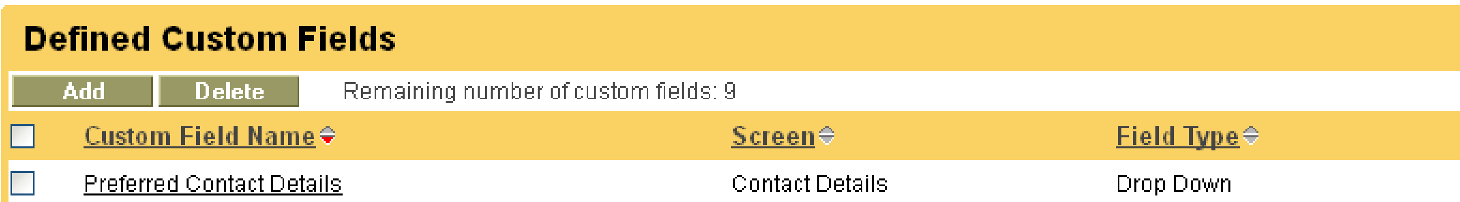


Figure 6.2: Add Custom Field

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

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

The entry added will then be listed as shown in Figure 6.3. You may add a maximum of 10 fields per screen.



Defined Custom Fields

Add | Delete | Remaining number of custom fields: 9

	Custom Field Name	Screen	Field Type
	Preferred Contact Details	Contact Details	Drop Down

Figure 6.3: Define Custom Fields

You may also add multiple entries of custom fields. To delete a custom field click on the check box next to the Custom Field Name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete".

Data Import

This feature allows the Admin to import data from a CSV file. To import data, go to **PIM>> Configuration>> Data Import** and the screen as shown in Figure 6.4 will appear.

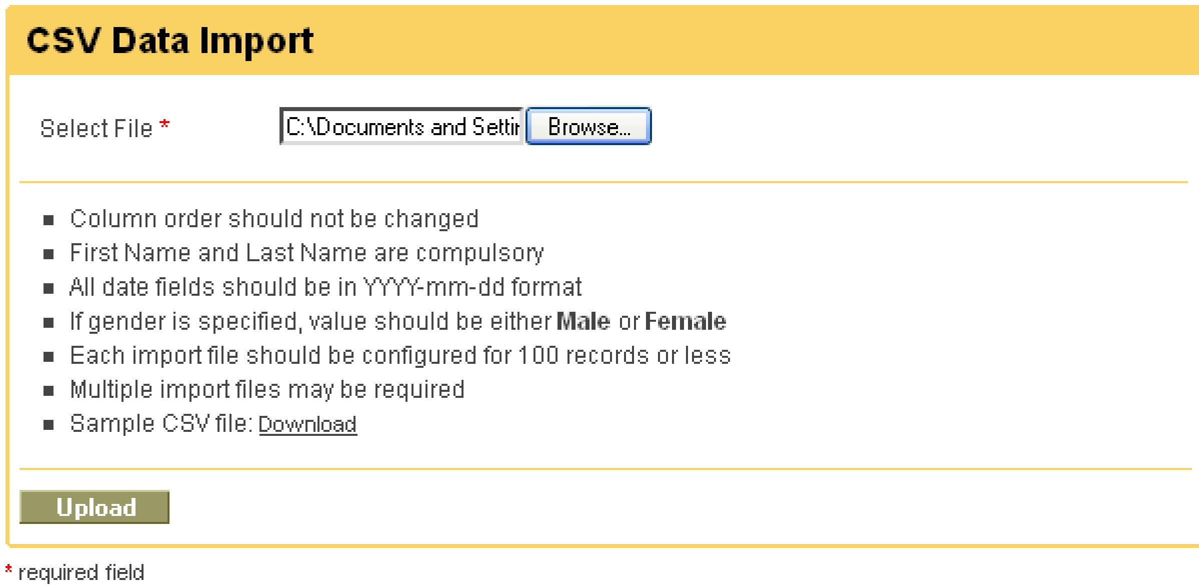


Figure 6.4: CSV Data Import

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

- Column order should not be changed: the column format of the CSV File should be the same as the "Sample CSV File". Click on Sample CSV File: "**Download**" to view the column format.

- First Name and Last Name are compulsory

- All data fields should be in YYYY-MM-DD format: if you have configured the date format under "Localization" (see Figure 6.2) the date will then be converted from YYYY-MM-DD to the localized date format.

- If gender is specified, value should be either male or female

- Each import should be configured for 100 records or less – maximum of 100 records can be imported.

- Multiple import files may be required: you may carry out multiple imports but maximum of 100 records or less per data import.

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

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

Reporting Methods

The HR admin can define the reporting method between an ESS-Employee and an ESS-Supervisor. To define the reporting method, go to **PIM>> Configuration>> Reporting Methods** and click “Add”, the screen as shown in Figure 6.5 will appear.

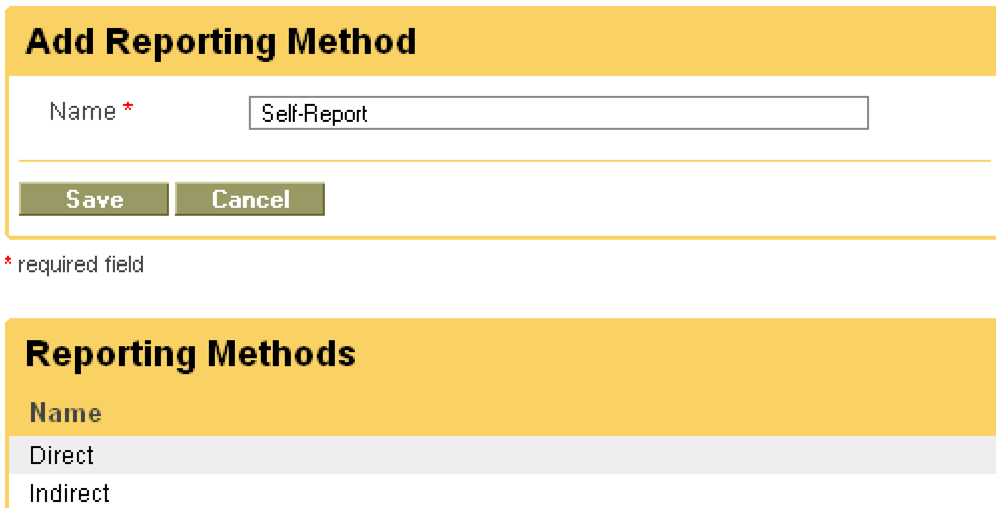


Figure 6.5: Add Reporting Method

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

The reporting method name will then be listed as shown in Figure 6.6.

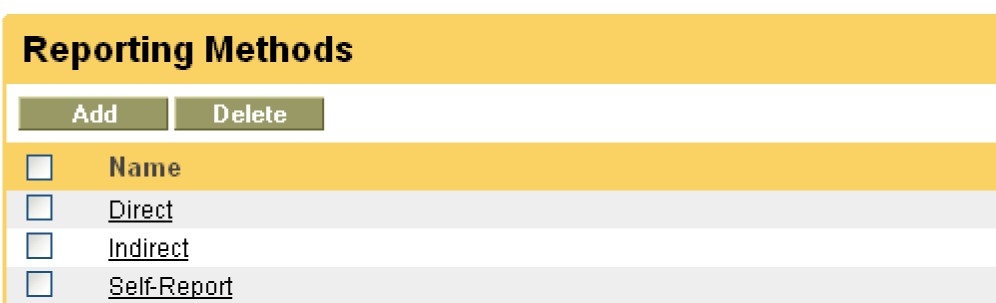


Figure 6.6: Reporting Method

You may also add multiple entries of reporting methods. To delete a reporting method click on the check box next to the Reporting Method Name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

Termination Reasons

This feature allows the HR Admin to define various termination reasons that is used by the company. To add a termination reason, go to PIM>>Configuration>>Termination Reason and click “Add” , the screen as shown in Figure 6.7 would appear. Click “Save” once the fields are added.

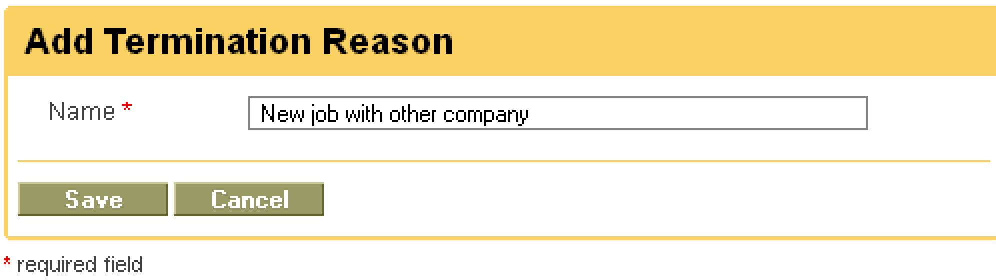


Figure 6.7: Add Termination Reason

The entry will then be added to the list as shown in Figure 6.8.

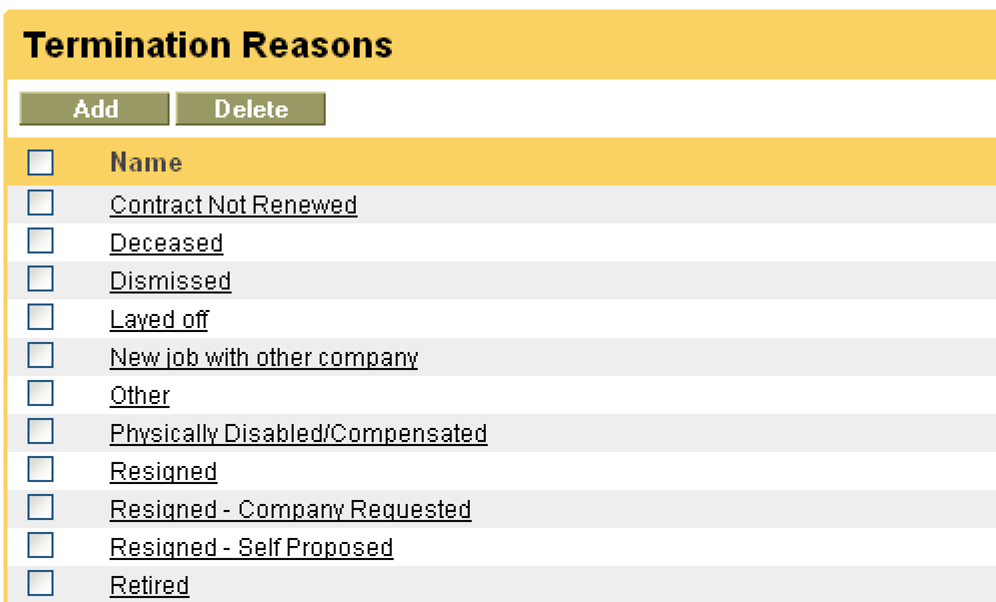


Figure 6.8: Termination Reasons

The following are default termination reasons:

- Contract not renewed
- Deceased
- Dismissed
- Layed Off
- Other

- Physically Disabled/Compensated
- Resigned
- Resigned-Company Requested
- Resigned-Self Proposed
- Retired

You may also add multiple entries of termination reasons**.** To delete a termination reason click on the check box next to the "Termination Reason" name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete".

6.2 Employee List

Lists all the employees entered and imported into the PIM. You can view/edit details of a particular employee by clicking on the employee's name or ID. To view the employee list, go to PIM>>Employee List and the screen as shown Figure 6.9 would appear.

Add Delete

Id	First (& Middle) Name	Last Name	Job Title	Employment Status	Sub Unit	Supervisor
0002	Berty Cruise	Brown	Customer Relationship Officer	Full Time Contract	GPO Box, 25 Cromwell St, ViCtoria Department	Bazz Smith,
	Olivia	Potter	Team Leader			Bazz Smith
0001	Bazz	Smith	Sales Manager		Head Office, UK, Department	
0003	Emma	White	Team Leader	Full Time Contract	Head Office, UK, Department	Bazz Smith
0004	Ann	White	HR Executive	Full Time Contract	Human Resources Division	Emma White Potter

Figure 6.9: Employee List

You may add multiple entries of employees by clicking "Add" through the screen as shown in Figure 6.9 or you may go to PIM>> Add Employee to enter employee details. *(See Figure 7.0)*

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

6.3 Add Employee

A new employee is added to the system here. Other than importing details this feature allows to add an employee and define a very informative profile. To add an employee, go to PIM>>Add Employee and the screen as shown in Figure 7.0 will appear.

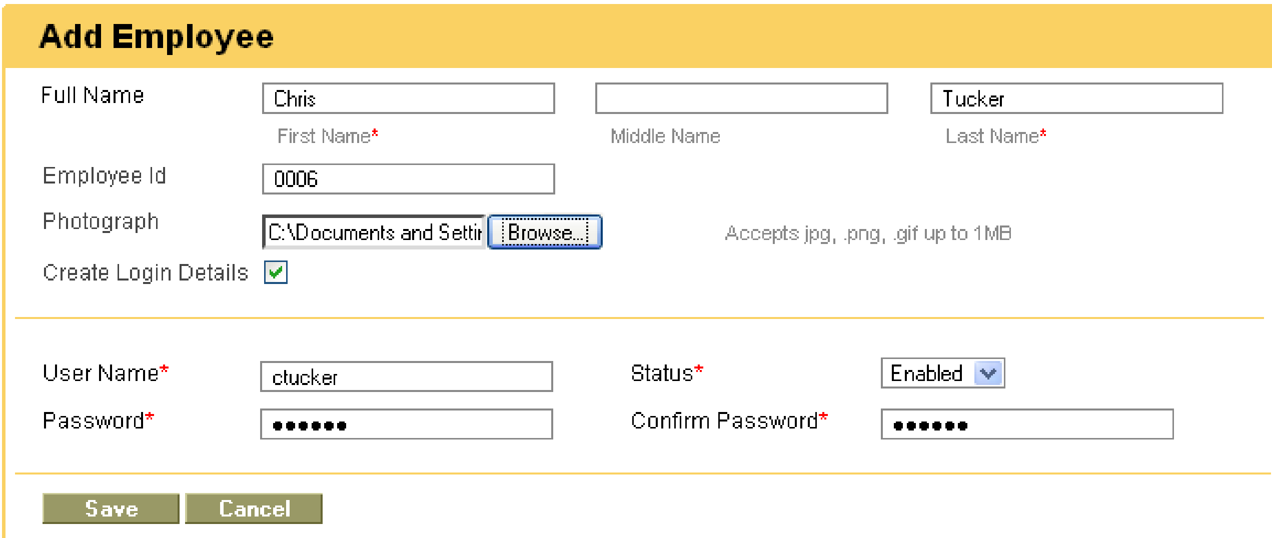


Figure 7.0: Add Employee

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

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

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

Employee’s Personal Details

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

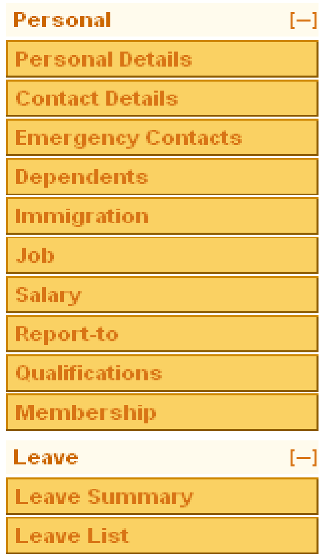


Figure 7.1: Employee Details

Personal Details

One you have added and saved the employee name with his/her picture and the user logins, the screen as shown in Figure 7.2 will appear. You can also edit the personal details listed below by clicking “Edit” on the bottom of the screen. Clicks “save” once the fields are added.

You can edit the following;

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

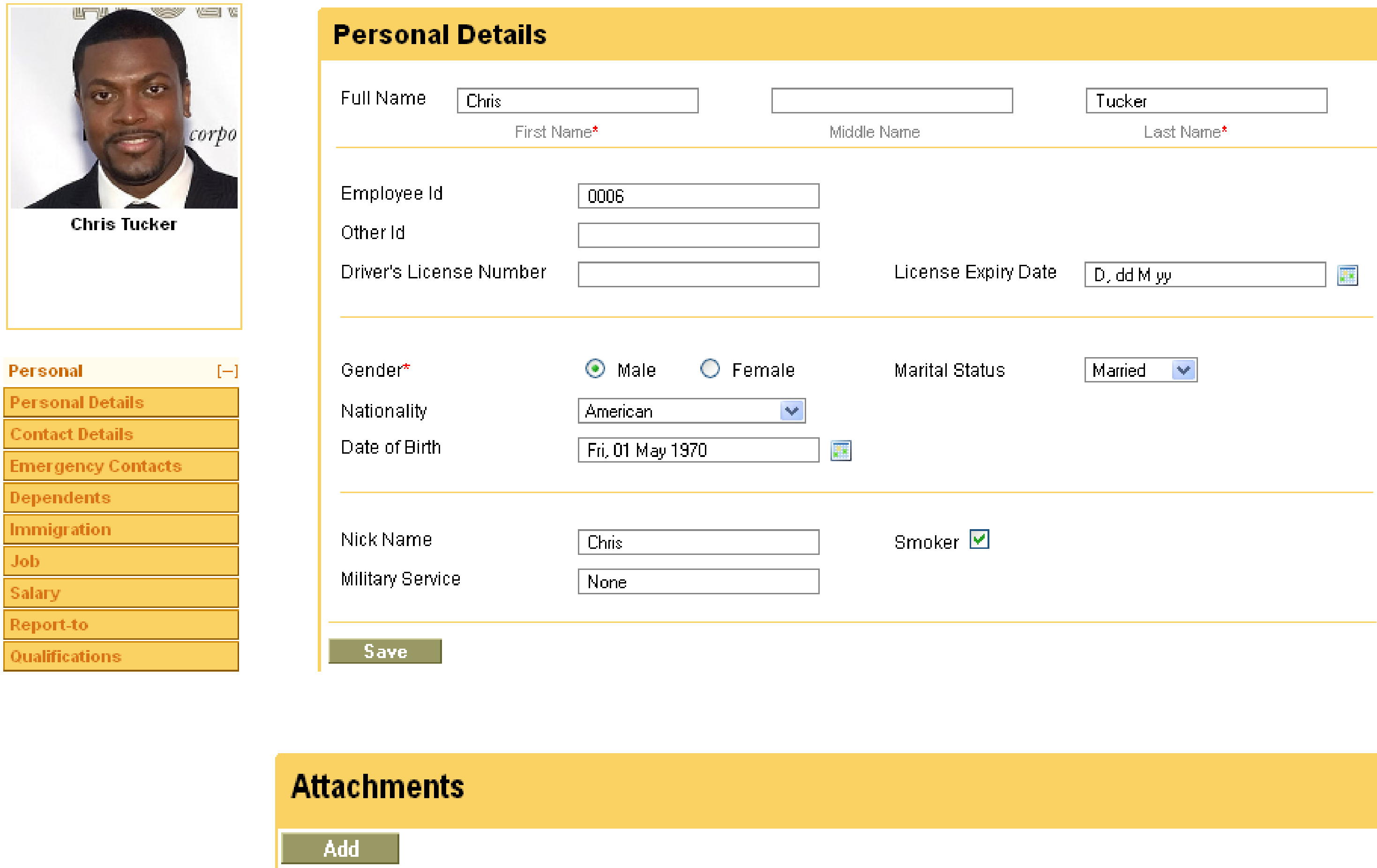


Figure 7.2: Personal Details

Click “Save” once completed.

You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and upload the following file by clicking “Upload” as shown in Figure 7.3.

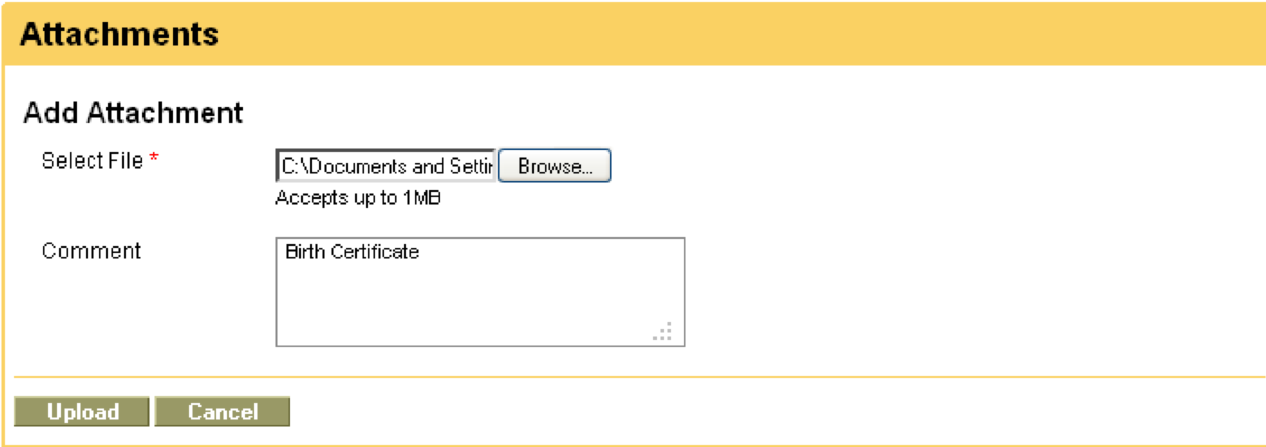
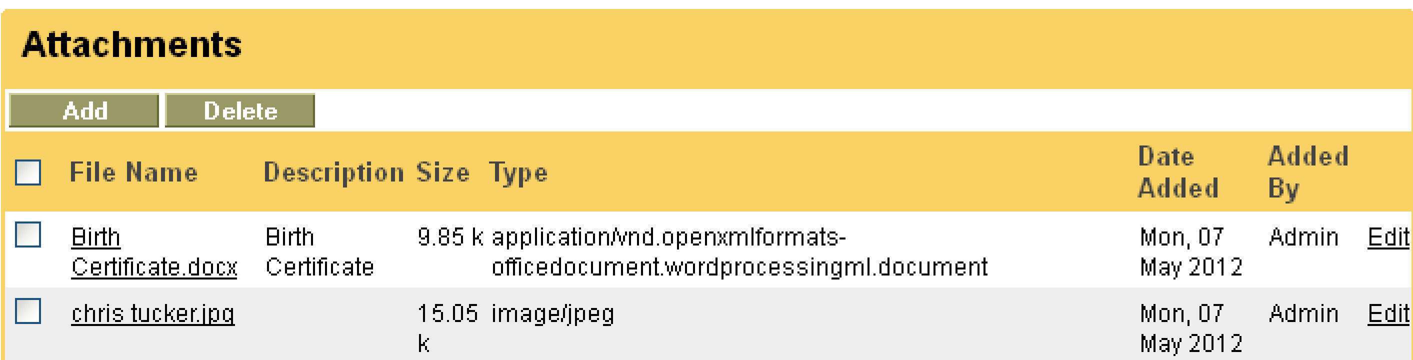


Figure 7.3: Attachments

You may upload multiple entries of supporting attachments. You may edit the following attachments by clicking "Edit" on the right hand end of a particular entry as shown in Figure 7.4. To delete an attachment, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete".



Attachments

Add | Delete

	File Name	Description	Size	Type	Date Added	Added By	
	Birth Certificate.docx	Birth Certificate	9.85 k	application/vnd.openxmlformats-officedocument.wordprocessingml.document	Mon, 07 May 2012	Admin	Edit
	chris tucker.jpg		15.05 k	image/jpeg	Mon, 07 May 2012	Admin	Edit

Figure 7.4: Manage Attachments

Contact Details

Contact information of an employee can be entered from here. Click on “Contact Details” under the “Personal” column and the screen as shown in Figure 7.5 will appear.

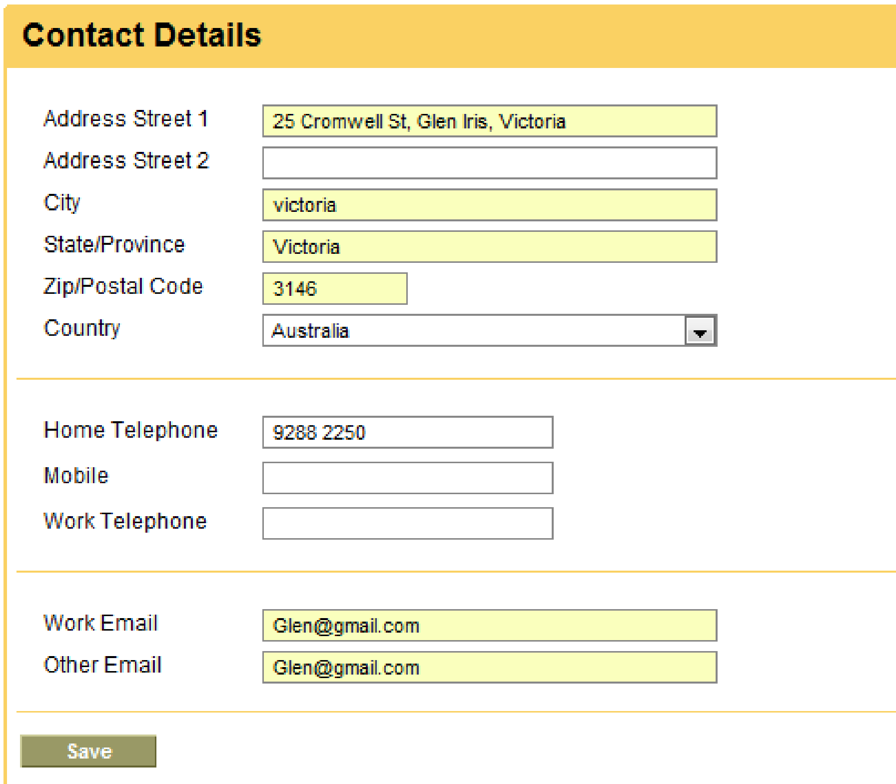


Figure 7.5: Contact Details

Click “Edit” to enter the information.
You can edit the following;

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

Once you completed this form click “Save”.

Emergency Contact

Contact details of an employee which will be needed during an emergency can be entered here. Select "Emergency Contacts" on the "Personal" column and the screen as shown in Figure 7.6 will appear.

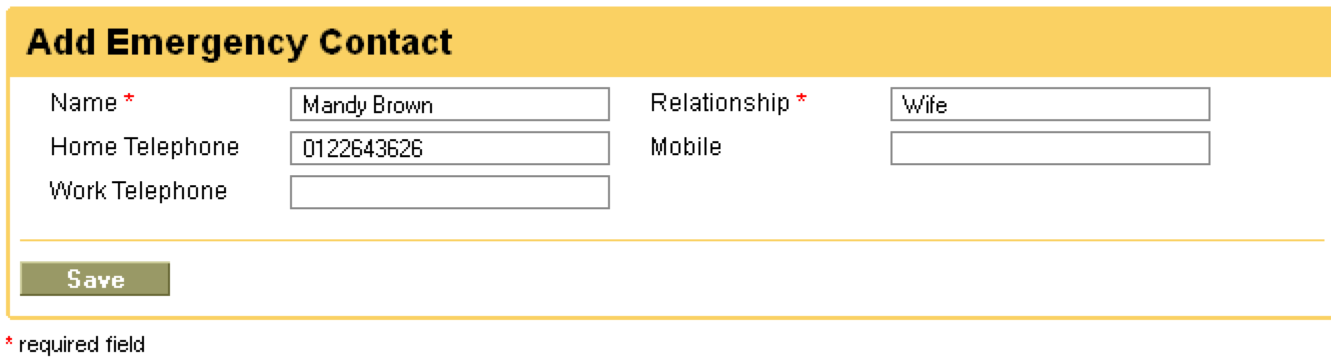


Figure 7.6: Add Emergency Contact

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

Click "Save" once the fields are added the emergency contact will be listed as shown in Figure 7.7.

Figure 7.7: Assigned Emergency Contacts

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

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

Dependents

If an employee has any dependants you can enter them here. To add a dependent, click on “Dependents” under the “Personal” column and the screen as shown in Figure 7.8 will appear.

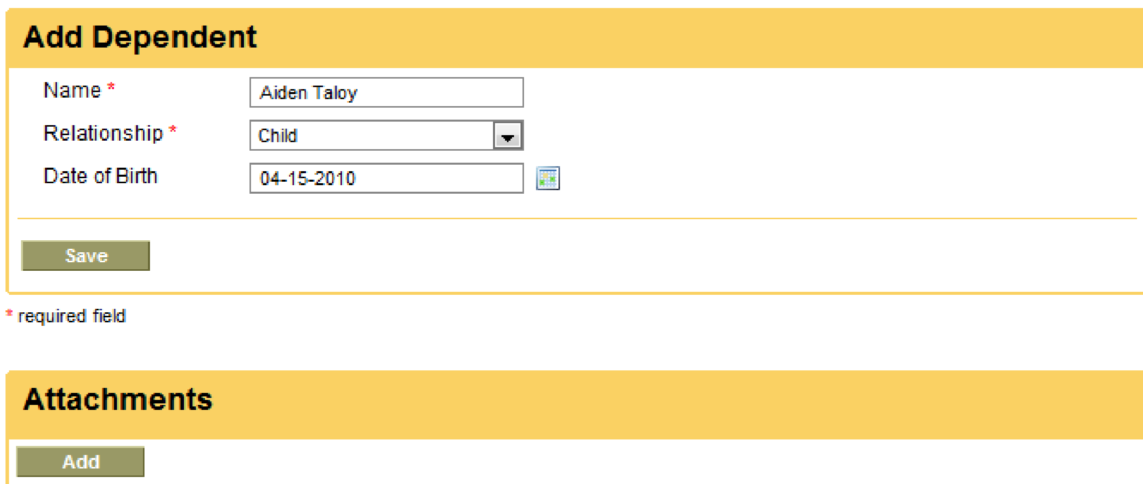


Figure 7.8: Add Dependant

Enter the “Name” of the dependant of the employee, the “Relationship” of the dependant to the employee and the “Date of Birth” of the dependant. Click “Save” once you have entered the following fields and the dependant will be listed as shown in Figure 7.9.

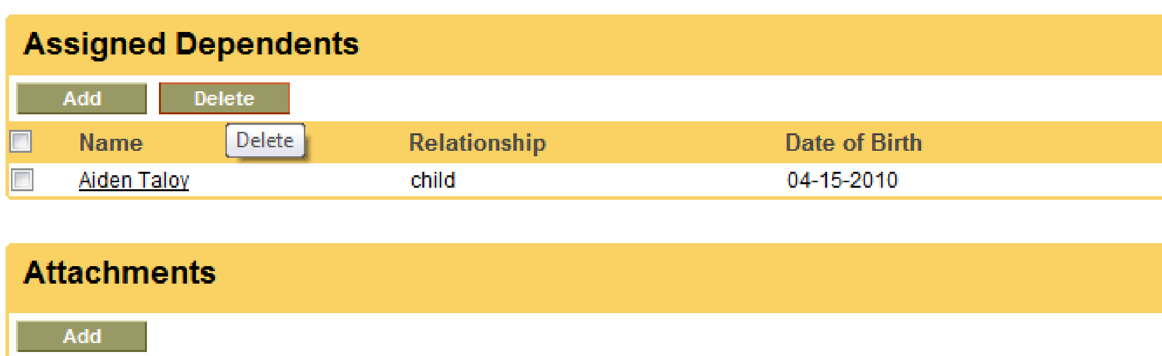


Figure 7.9: Assigned Dependents

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

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

Immigration

Immigration information can be entered here. To add immigration information of a particular employee, select "Immigration" under the "Personal "column and the screen as shown in Figure 8.0 will appear.

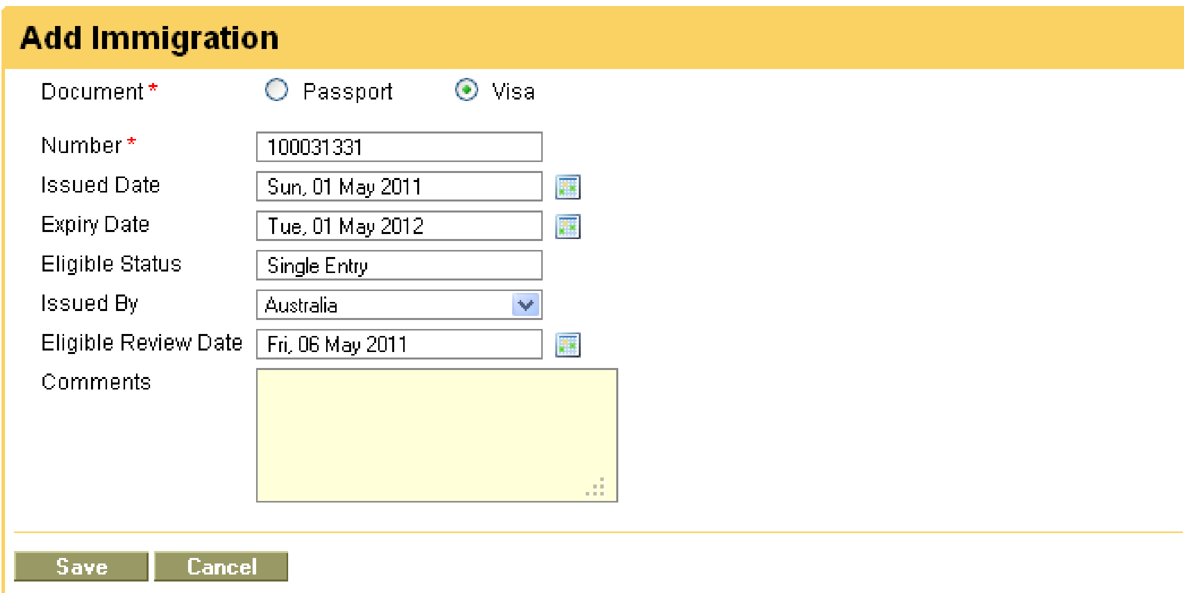


Figure 8.0: Add Immigration

Select the document type (Passport or Visa) you wish to add details of, the "Number" whether it is a passport number or a visa number, the " Issued Date" , "Expiry Date", the "Eligible Status" of his Passport/Visa and the "Eligible Review Date" as to when the eligibility status was reviewed. You may write a comment if necessary.

Click "Save" once the fields are added and the following immigration documents will be listed as shown in Figure 8.1.

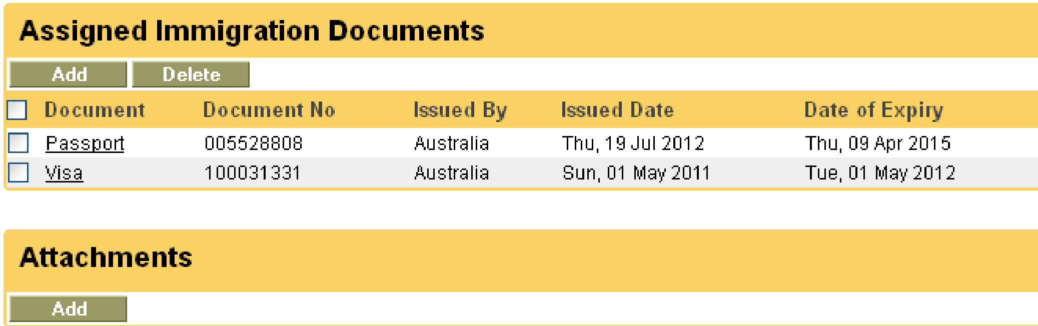


Figure 8.1: Assigned Immigration Documents

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

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

Job

You could describe the role of the employee in the company through this feature. To define the employee’s job, select “Job” under the “Personal” column and the screen as shown in Figure 8.2 will appear. Click “Edit” to enter the job details of the employee.

Enter the following fields and click “Save” once done.

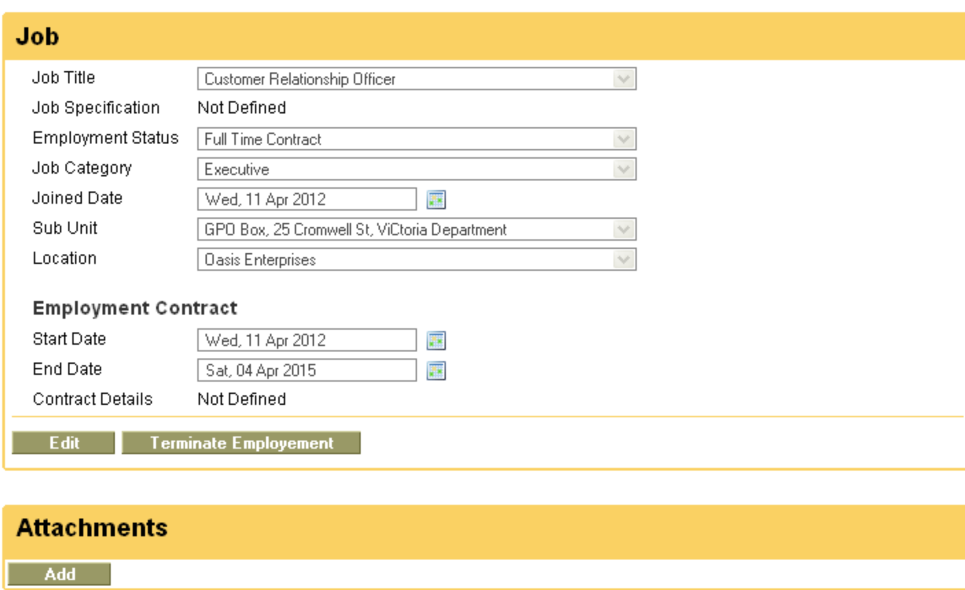


Figure 8.2: Job

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

You may also terminate the employment of an employee by clicking "Terminate Employment" and the screen as shown in Figure 8.3 will appear.

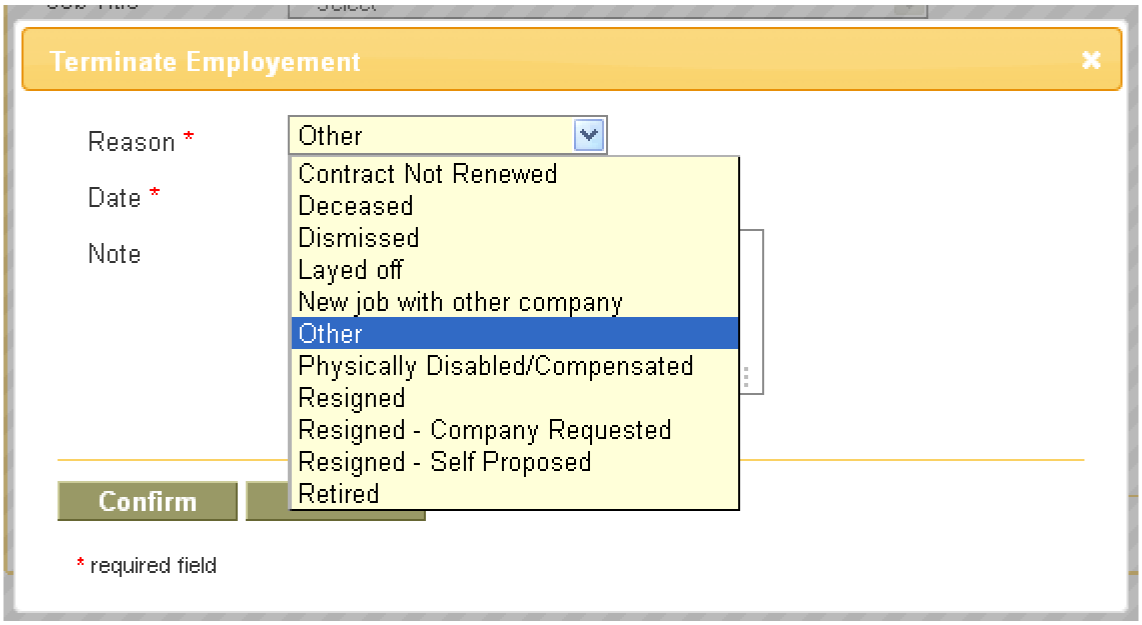


Figure 8.3: Terminate Employement

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

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

Salary

Information with regards to salary of an employee is entered here. To define the employee's salary information, select "Salary" from the "Personal" column and the screen as shown in Figure 8.4 will appear.

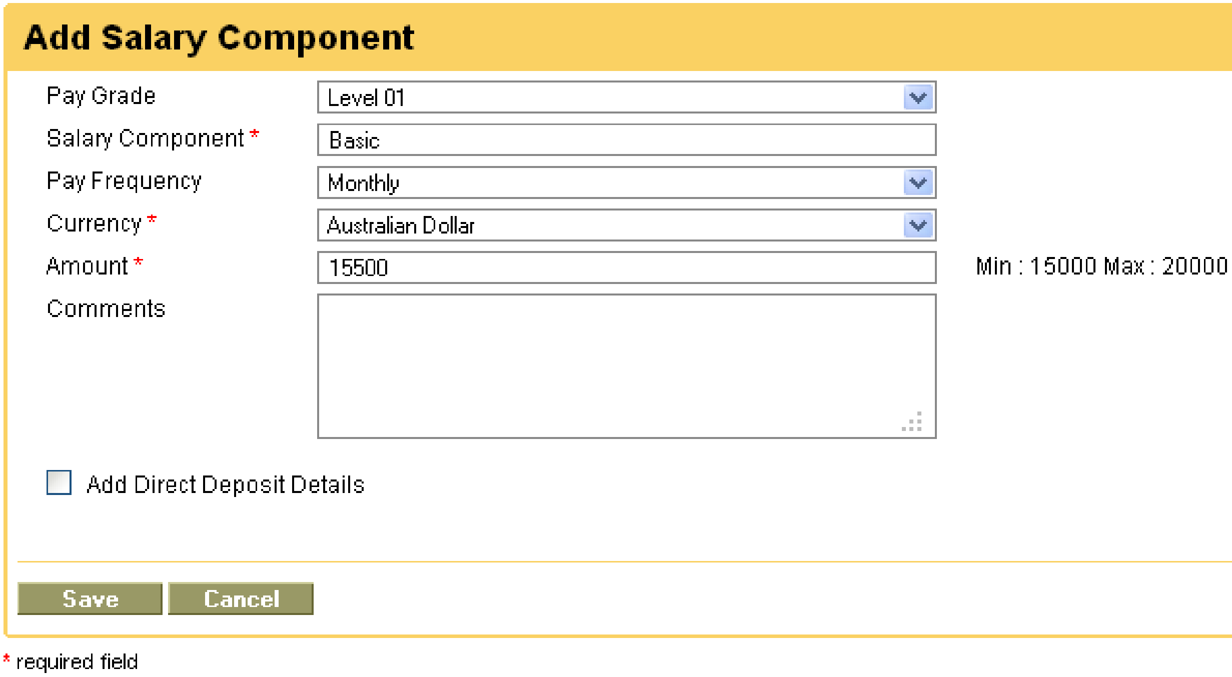


Figure 8.4: Add Salary Component

Enter the following fields:

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

➢ **Direct Deposit**

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

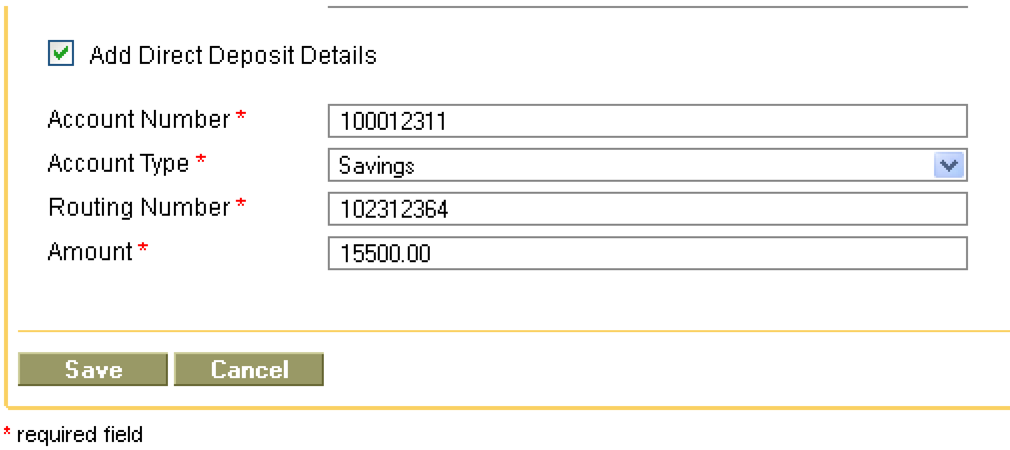
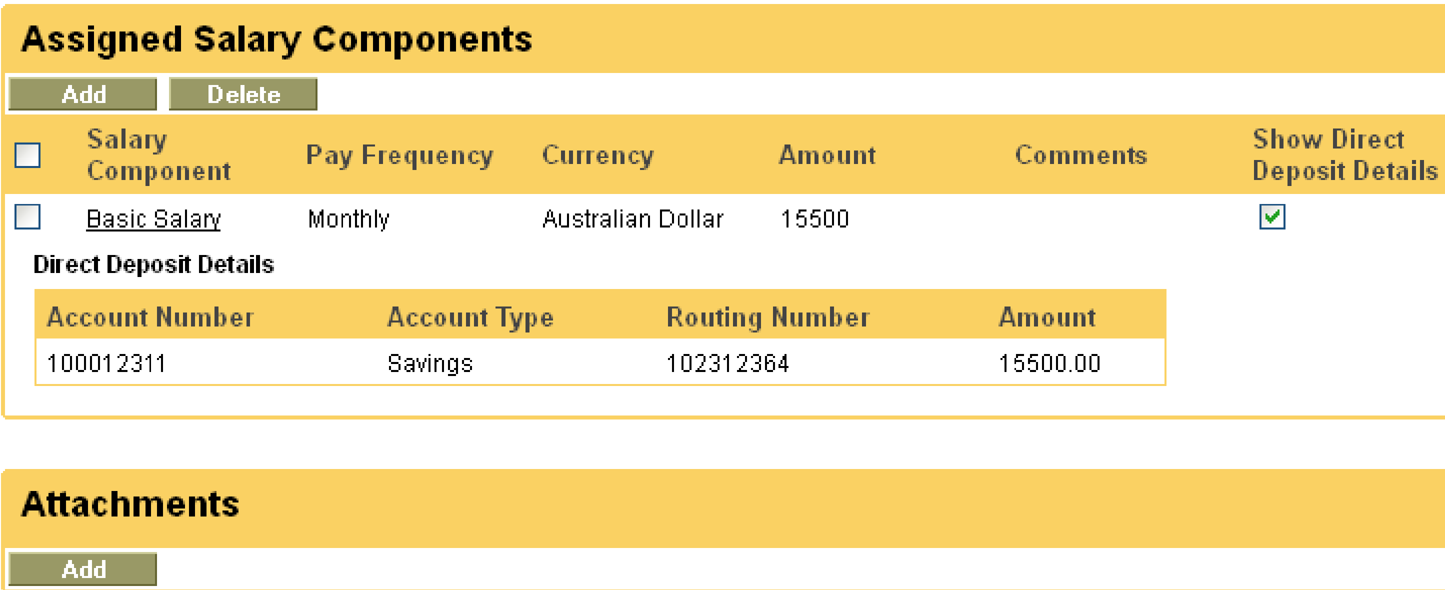


Figure 8.5: Add Direct Deposit Details

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

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

Once you have entered the following details, click "Save" and the following salary components with the direct deposit details will be listed as shown in Figure 8.5.



Assigned Salary Components

Add | Delete

	Salary Component	Pay Frequency	Currency	Amount	Comments	Show Direct Deposit Details
☐	Basic Salary	Monthly	Australian Dollar	15500		☑

Direct Deposit Details

Account Number	Account Type	Routing Number	Amount
100012311	Savings	102312364	15500.00

Attachments

Add

Figure 8.6: Assigned Salary Components

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

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

Report To

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

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

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

To define the supervisors and the subordinates of a particular employee, select “Report to” from the “Personal” column and screen as shown in Figure 8.7 will appear.

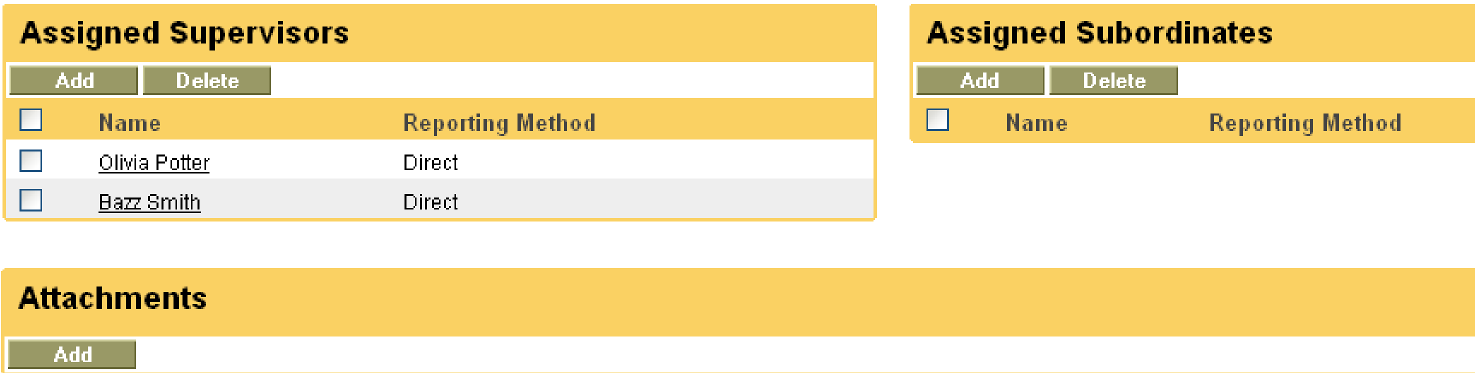


Figure 8.7: Report-to

To assign a supervisor/subordinate for a particular employee, click "Add" under "Assigned Supervisors" or Assigned Subordinate" and the screen as shown in Figure 8.8 and Figure 8.9 will appear respectively.

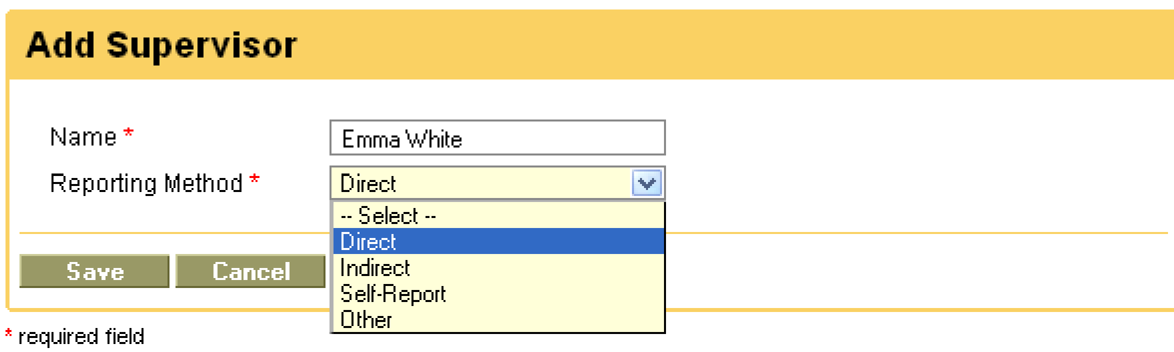


Figure 8.8: Add Supervisor

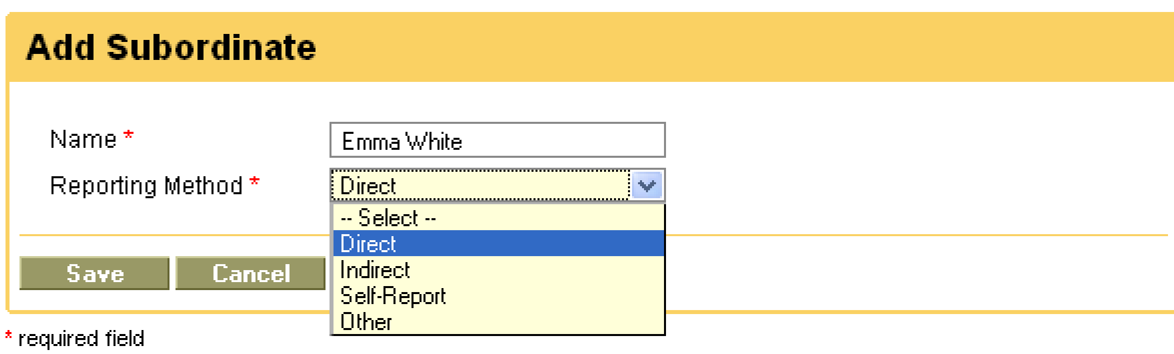


Figure 8.9: Add Subordinate

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

Once the supervisor/subordinates have been defined they will be listed as shown in Figure 9.0.

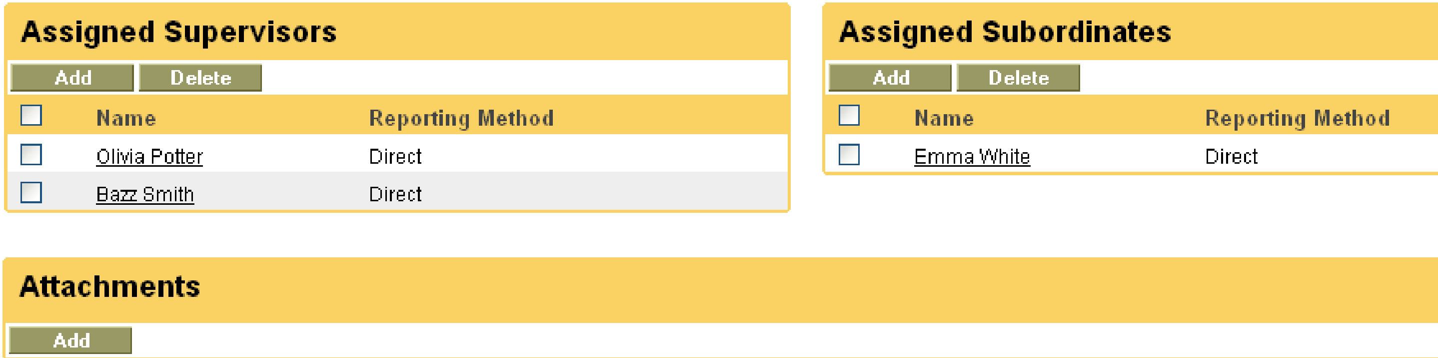


Figure 9.0: Assigned Supervisors/Assigned Subordinates

You may enter multiple entries of supervisors or subordinates for a particular employee. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete".

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

Qualifications

➢ Work Experience

Previous work experiences of an employee can be entered here. To enter employee's previous work experience, select "Qualification" under the "Personal" column and click "Add" under "Work Experience" and the screen as shown in Figure 9.1 will appear.

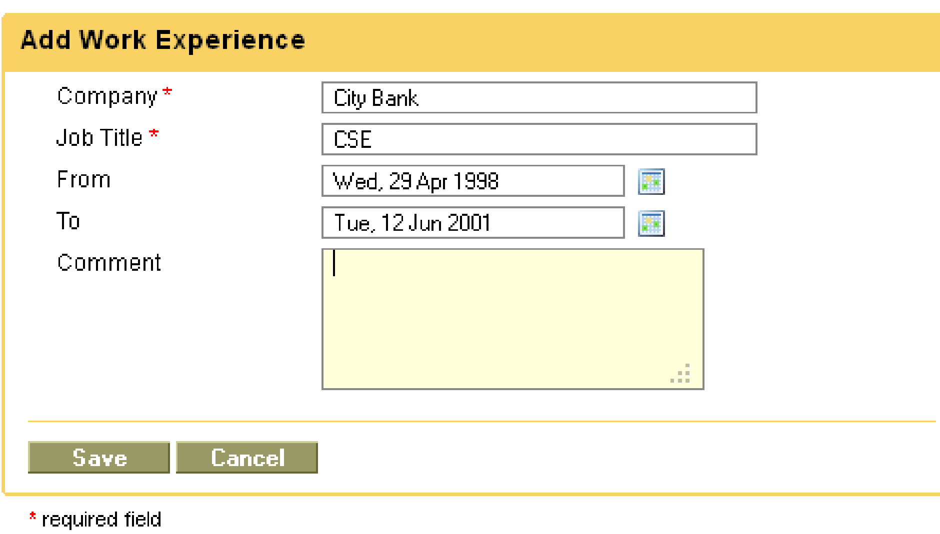


Figure 9.1: Add Work Experience

Click “Save” once all the fields are entered and the particular work experience will be listed as shown in Figure 9.2.

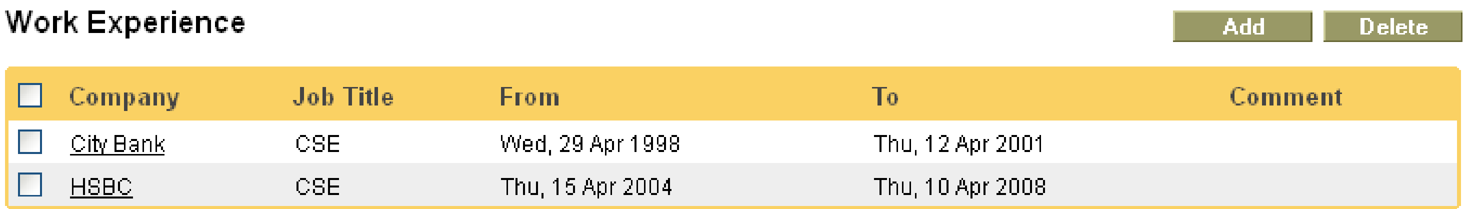


Figure 9.2: Work Experience

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

- **Education**

Education details of an employee can be entered here. To enter employee’s education background, select “Qualification” under the “Personal” column and click “Add” under “Education” and the screen as shown in Figure 9.3 will appear.

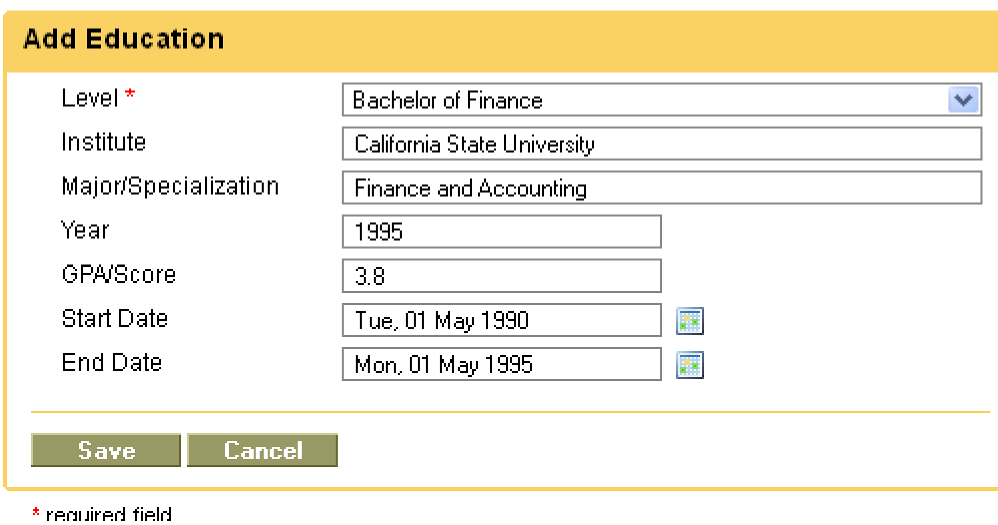


Figure 9.3: Add Education

Click “Save” once all the fields are entered and the particular work experience will be listed as shown in Figure 9.5.

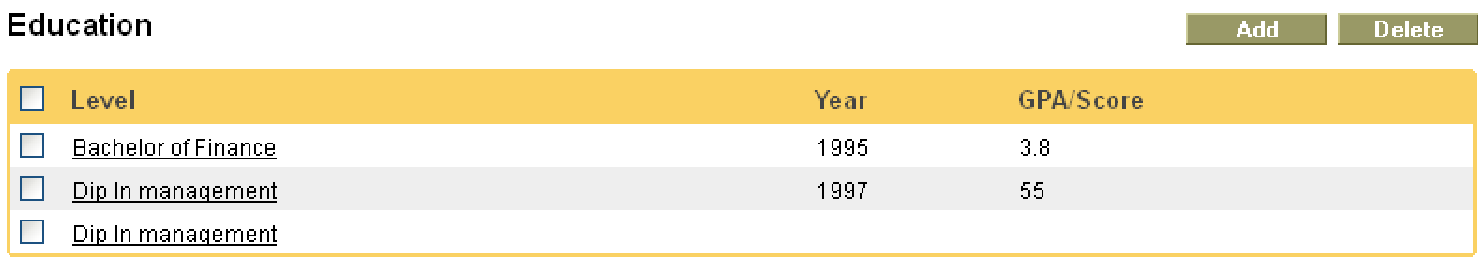


Figure 9.4: Education

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

- **Skills**

If an employee has any special talents or skills they can be entered here. To enter an employee’s skills, select “Qualification” under the “Personal” column and click “Add” under “Skills” and the screen as shown in Figure 9.5 will appear.

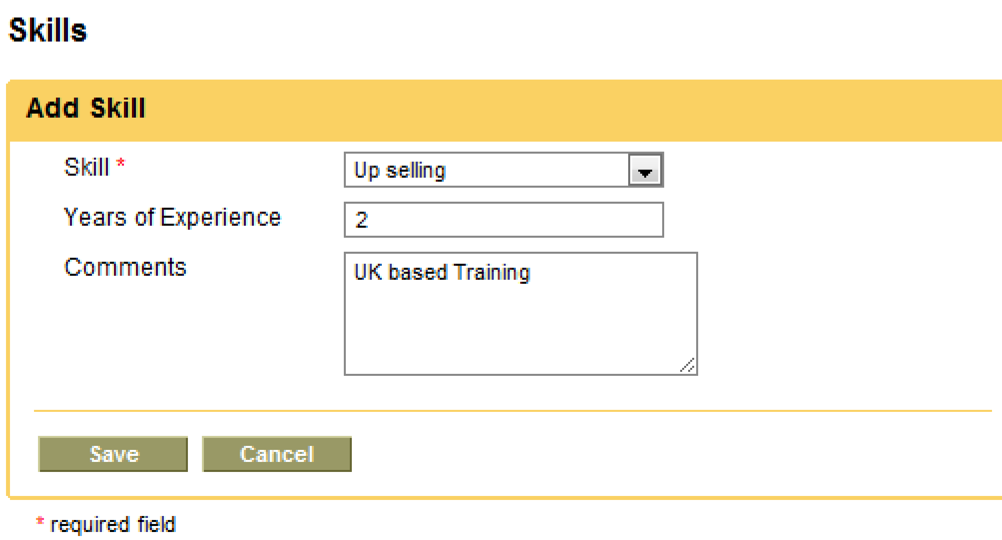


Figure 9.5: Add Skill

Click “Save” once all the fields are entered and the particular work experience will be listed as shown in Figure 9.6.

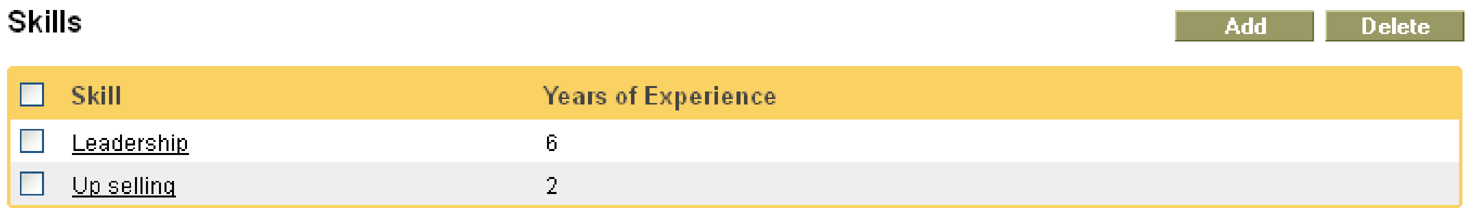


Figure 9.6: Skills

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

- **Languages**

You can enter the various languages that your employees are competent in, with the level of competency. To enter an employee’s language of competency, select “Qualification” under the “Personal” column and click “Add” under “Language” and the screen as shown in Figure 9.7 will appear.

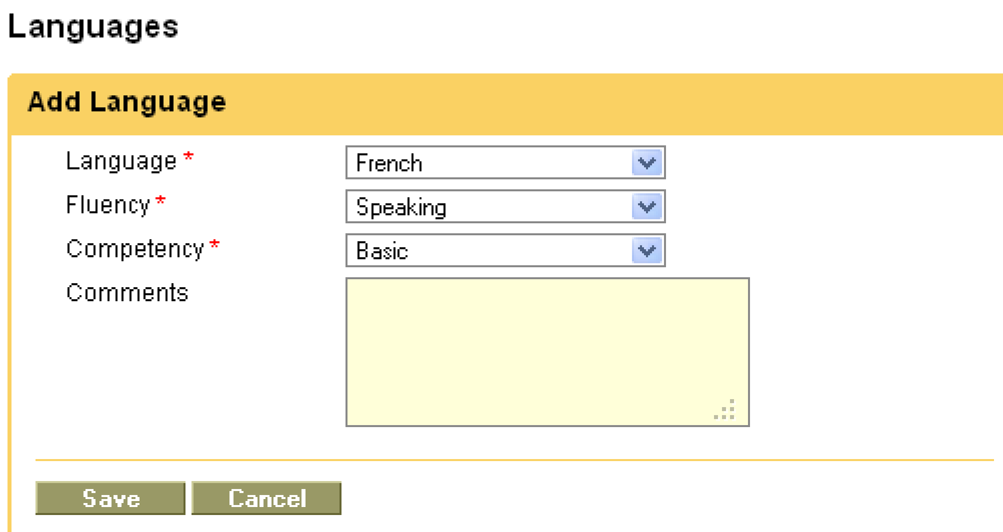


Figure 9.7: Add Language

Click “Save” once all the fields are entered and the particular work experience will be listed as shown in Figure 9.8.

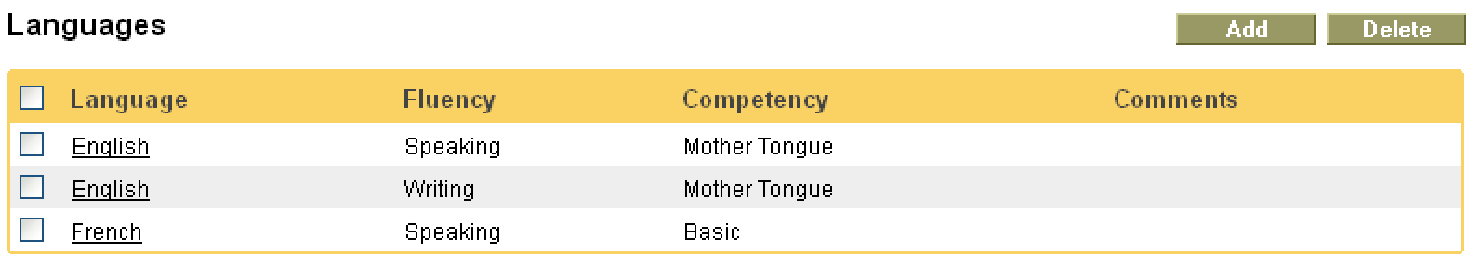


Figure 9.8: Languages

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

- **License**

Here you can enter the licenses an employee can have. To enter an employee's licenses, select "Qualification" under the "Personal" column and click "Add" under "License" and the screen as shown in Figure 10.0 will appear.

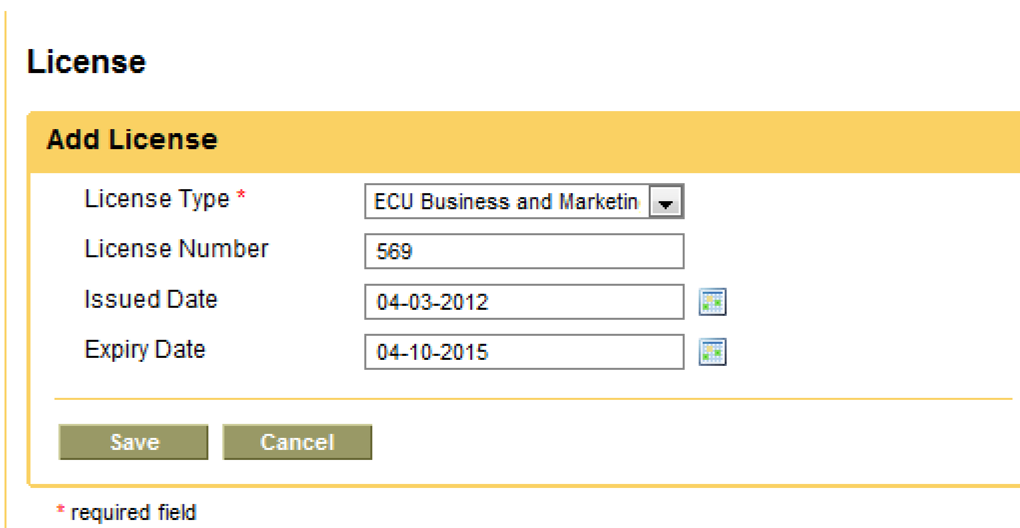


Figure 9.9: Add License

Click "Save" once all the fields are entered and the particular work experience will be listed as shown in Figure 10.0.

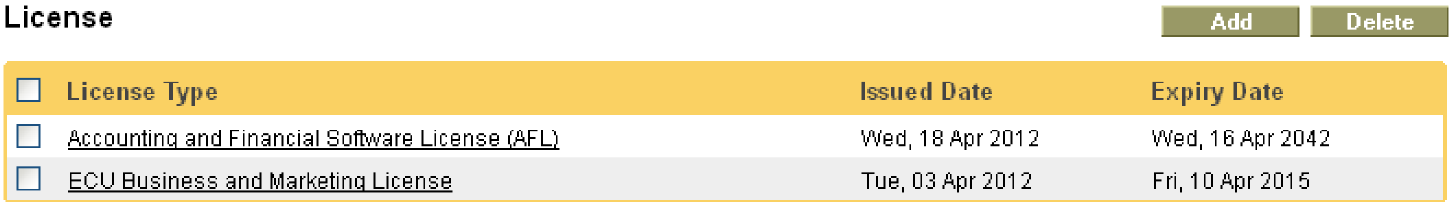


Figure 10.0: License

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

- **Attachments**

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

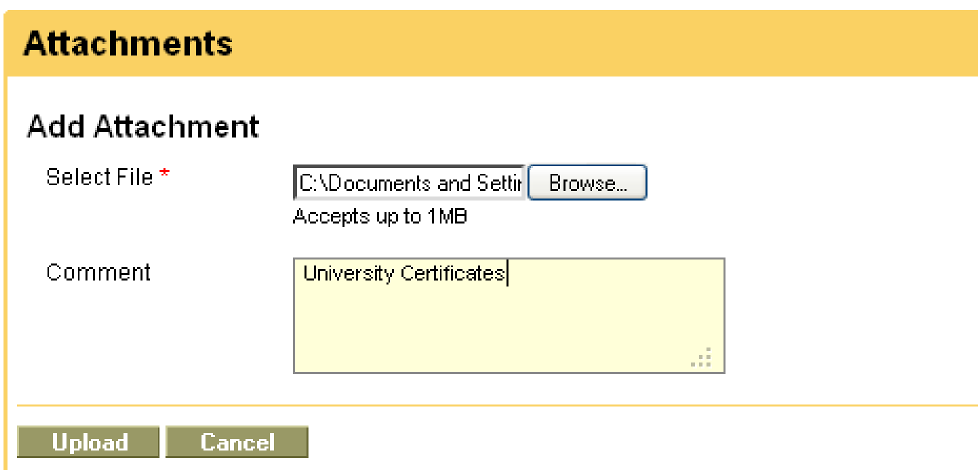


Figure 10.1: Attachments

Once you have uploaded the file, the file will be listed as shown in Figure 10.2.

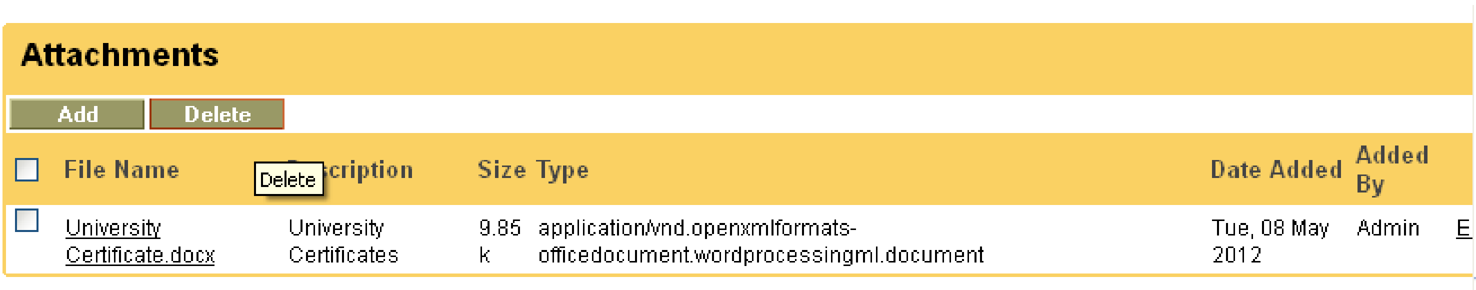


Figure 10.2: Manage Attachments

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

Membership

If employees are members of any committee, institute etc. those details can be entered here. To enter employee's membership details, select "Membership" from the Personal column and click "Add" and the screen as shown in Figure 10.3 will appear.

Figure 10.3: Add Membership Details

Click "Save" once all the fields are entered and the particular work experience will be listed as shown in Figure 10.4.

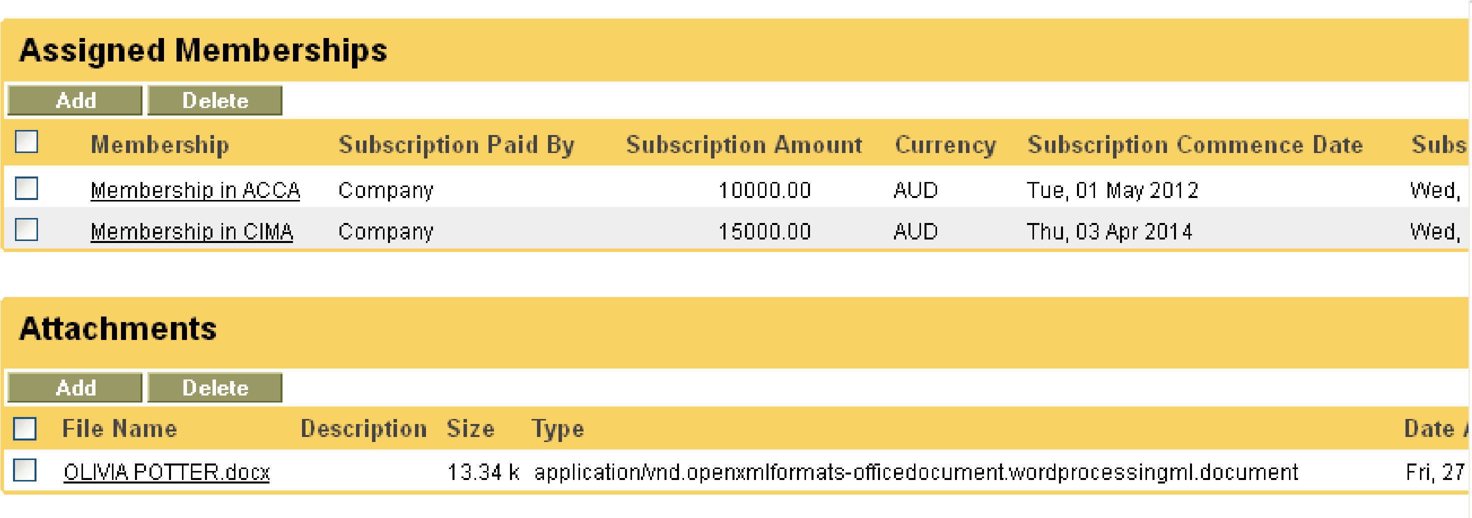


Figure 10.4: Assigned Memberships

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

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

Employee Leave Details

The leave summary and the leave list of an employee can be viewed here. This provides an individual view of an employee’s leave summary and leave list. Limited or all details can be viewed depending on the user type:

- **HR Admin:** can view/edit all the employees’ details including their leave summary and leave list.
- **ESS-Supervisor**: can only view/edit his personal details and view only his/her leave summary and leave list as well as his/he subordinates. An ESS-Supervisor will have access to the PIM module when he/she logs into the system and view his subordinate’s personal and leave details.
- **ESS-Employee**: can only view/edit his personal details and view his/her personal leave summary and leave list. An ESS-Employee has no access to the PIM module however he/she can view his/her personal and leave details through the My Info Module.

Leave Summary

➢ HR Admin View of Employee's Leave Summary

The HR admin can view the leave summary for an individual employee through this.
The HR Admin can edit the leave entitlement for a particular employee. To edit, click "Edit" and make changes in the leave entitlement. Click "Save" once done.

Employee Name	Leave Type	Leave Entitled (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (I
Berty Cruise Brown	Annual Leave	6.00	0.00	0.00	6.00
Berty Cruise Brown	Casual Leave	11.00	1.00	5.00	5.00
Berty Cruise Brown	Lieu Leave	2.00	2.00	0.00	0.00
Berty Cruise Brown	Maternity Leave	0.00	0.00	0.00	0.00
Berty Cruise Brown	Medical Leave	6.00	0.00	0.00	6.00

Edit Reset

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Figure 10.5: HR Admin View of Employee's Leave Summary

➢ ESS- Supervisor and ESS Employee view of Leave Summary

The ESS-Supervisor can view his personal leave summary as well as his subordinates individually. The screen as shown in Figure 10.6 shows a single view of leave summary for an individual employee.

Employee Name	Leave Type	Leave Entitled (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance
Bazz Smith	Annual Leave	12.00	0.00	4.00	8.00
Bazz Smith	Casual Leave	6.00	0.00	0.00	6.00
Bazz Smith	Lieu Leave	2.00	0.00	0.00	2.00
Bazz Smith	Maternity Leave	0.00	0.00	0.00	0.00
Bazz Smith	Medical Leave	6.00	5.50	0.00	0.50

Figure 10.6: ESS-Supervisor and ESS Employee's Leave Summary

Leave List

This feature shows all the leave requests by an individual employee. The HR Admin can view all employees' leave request individually , an ESS-Supervisor can view his leave requests as well as his subordinates individually while an ESS-Employee can only view his leave requests.

- **HR Admin views employee's leave list through PIM Module**

The HR admin can only view a single employee list for an individual employee through this module.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments		Actions
Tue, 01 May 2012	Berty Cruise Brown	Annual Leave	6.00	0.67	Pending Approval(0.67)	To take half day.		Select Ac
Save								

Figure 10.7: HR Admin views employee's leave list though PIM Module

The HR admin can action the pending leave requests (if any) by selecting from the "Actions "drop down menu. Click "Save" to confirm action.

- **ESS-Supervisor View of Leave List**

The ESS-Supervisor can view his leave requests (through the My Info Module) as well as his subordinates (through the PIM Module) individually.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments		Actions
Tue, 01 May 2012	Berty Cruise Brown	Annual Leave	6.00	0.67	Pending Approval(0.67)	To take half day.		Select A
Save								

Figure 10.8: ESS-Supervisor View of Leave List

The ESS-Supervisor can action the pending leave requests of his subordinates (if any) by selecting from the "Actions "drop down menu. Click "Save" to confirm action.

- **ESS-Employee View of Leave List**

An ESS-Employee can only view his leave requests. He/She may only "Cancel" his pending/scheduled leave requests. To cancel leave request, select "Cancel" from the "Action "drop down selection as shown in Figure

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
Wed, 12 Sep 2012 to Thu, 13 Sep 2012	Berty Cruise Brown	Lieu Leave	0.00	2.00	Scheduled(2)		Select Acti
Thu, 14 Jun 2012 to Fri, 15 Jun 2012	Berty Cruise Brown	Annual Leave	6.00	2.00	Rejected(2)		
Tue, 08 May 2012 to Wed, 09 May 2012	Berty Cruise Brown	Casual Leave	5.00	2.00	Taken(2)	Overstaff	
Wed, 02 May 2012 to Thu, 03 May 2012	Berty Cruise Brown	Casual Leave	5.00	2.00	Taken(2)	My mother's bday	
Tue, 01 May 2012	Berty Cruise Brown	Annual Leave	6.00	0.67	Pending Approval(0.67)	To take half day.	Cancel
Thu, 26 Apr 2012 to Fri, 27 Apr 2012	Berty Cruise Brown	Casual Leave	5.00	2.00	Taken(2)		

Save

Figure 10.9: ESS-Employee View of Leave List

Click “Save” to confirm action.

7.0 Leave Module

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

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

The Admin can:

- View Leave Summary for each employee and entitle leave days of each available type
- Configure leave periods, leave types, work week and holidays
- Assign Leave for any employee
- See Scheduled Leave for any employee
- See list of Taken Leave for any employee
- If the admin user is an employee then he will see the ‘Apply’ ‘My Leave’ and ‘Personal Leave Summary’ options along with the rest of the features.
- View the leave calendar which will display all types of leaves for a month for all or individual departments.

A Supervisor can:

- View the Personal or Employee (subordinate) Leave Summary
- View the Leave List
- Apply Leave
- Assign Leave for his/her subordinates
- Approve/Reject Leave for his/her subordinates
- View the leave calendar which will display all types of leaves for a month for all subordinates or for his division.

The ESS User can:

- View the 'Personal Leave Summary'
- View the detailed leave information
- Apply for leave
- View the leave calendar which will display all his leave during a particular month.

7.1 Configure

The HR admin is able to configure the following that will be reflected throughout the Leave Module as shown in Figure 11.0.

Figure 11.0: Configure

- Leave Period
- Leave Types
- Work Week
- Holidays

Leave Period

The HR Admin and other users with admin rights are able to define the leave period that will be used when applying/assigning leave. To define a leave period, go to **Leave>> Configure>> Leave Period** and a screen as shown in Figure 11.1 will appear. Click "Edit" to enter fields.

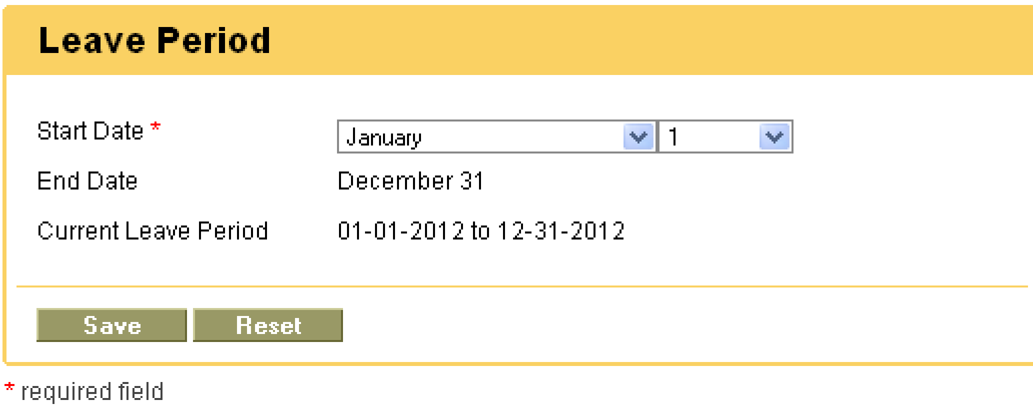


Figure 11.1: Define Leave Period

You can define the "Start Date" by selecting from the drop down menu for the Month and Date. The system will automatically set the "End Date" as to have a one-calendar year leave period.

Click "Save" and the current leave period will be stated below the "End Date".

Leave Types

Through this section the admin and any other user with admin rights will be able to define leave types, which are compatible with the HR policies of the company. To add leave types, go to **Leave>> Configure>> Leave Types** and the screen as shown in Figure 11.2 will appear.

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

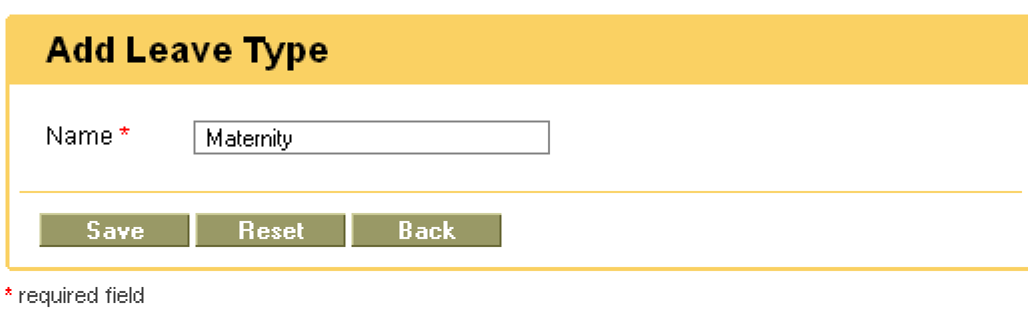


Figure 11.2: Add Leave Type

Once a leave type is added, it will be listed as shown in Figure 11.3. You may add multiple entries of leave types. You may view/edit leave type by clicking on the "Leave Type" name.

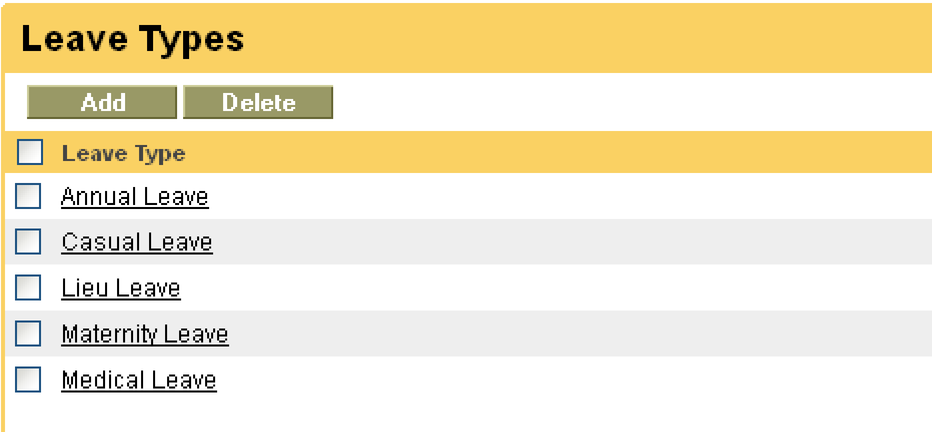


Figure 11.3: Leave Types List

To delete a leave type, click on the check box next to the "Leave Type" name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete".

Work Week

The HR Admin and any other users with admin rights will be able to define the work weeks for all employees. To define work week, go to **Leave>> Configure>> Work Week** and the screen as shown in Figure 11.4 will appear.

Click "Edit" to define the work week.

In this feature, you can define the days that the company operates whether they are:

- Full Day
- Half Day
- Non-Working Day

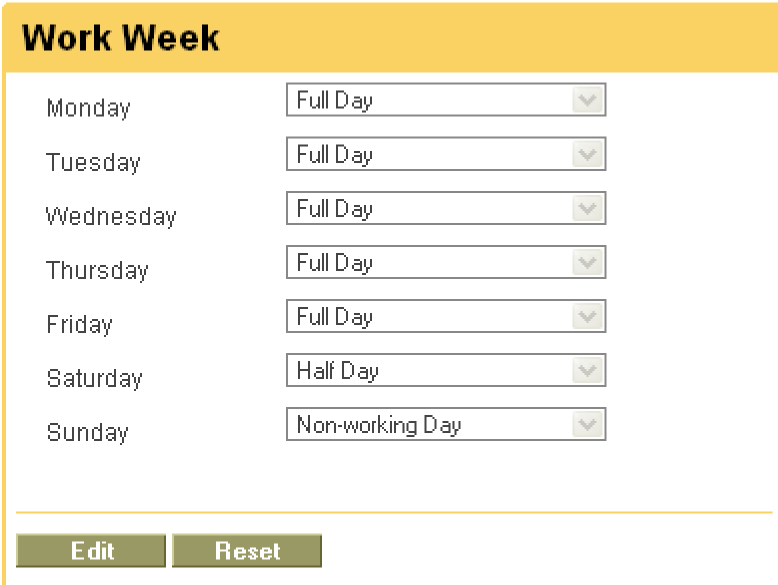


Figure 11.4: Define Work Week

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

Holidays

The HR admin and other users with admin rights can define holidays that will be applicable to the entire company and will be taken into consideration while calculating leave duration.
To define "Holidays", go to **Leave>> Configure>> Holidays** and click "Add", a screen as shown in Figure 11.5 will appear.

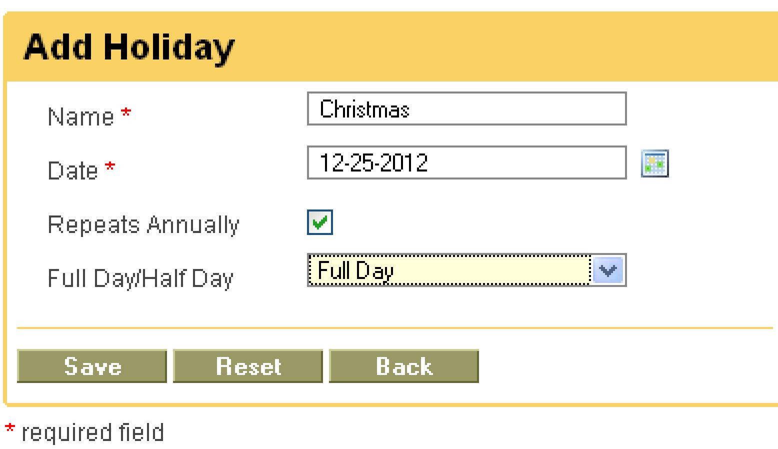


Figure 11.5: Add Holiday

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

Click "Save" once you have defined the holiday.

Once a holiday is added, it will be listed as shown in Figure 11.6.

You also have the option to also "Search" for the holidays that are occurring for a particular leave period.

Figure 11.6: Holiday List

You may add multiple entries of holidays. You may view/edit holidays by clicking on the "Holiday" name.

To delete a holiday, click on the check box next to the "Holiday" name. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete".

7.2 Leave Summary

This feature allows you to view the summary of the leave and also assign leave quota (Admin Users only). The menu will show data depending on the user type:

- **Admin:** will see "Employee Leave Summary" and has full rights.
- **ESS User-Supervisor**: will see "Employee Leave Summary" (subordinates only) and the "Personal Leave Summary" and has viewing rights only.
- **ESS User**: will see "Personal Leave Summary" and has viewing rights only.
  Employee Leave Summary.

HR Admin View of Leave Summary

This feature enables the HR Admin and other users with admin rights to view the leave summary of all employees and add leave entitlements of all leave types for each employee. To view/edit leave summary, go to **Leave>> Leave Summary** and the screen as shown in Figure 11.7 will appear.

To run and view a specific leave summary, you may use the search toolbar and apply the following criteria and click "Search".

*Note: If the "Search Toolbar" is not used, all employees with all their leave types will be shown on the screen. You can enter all leave entitlements manually for each leave types for employees.

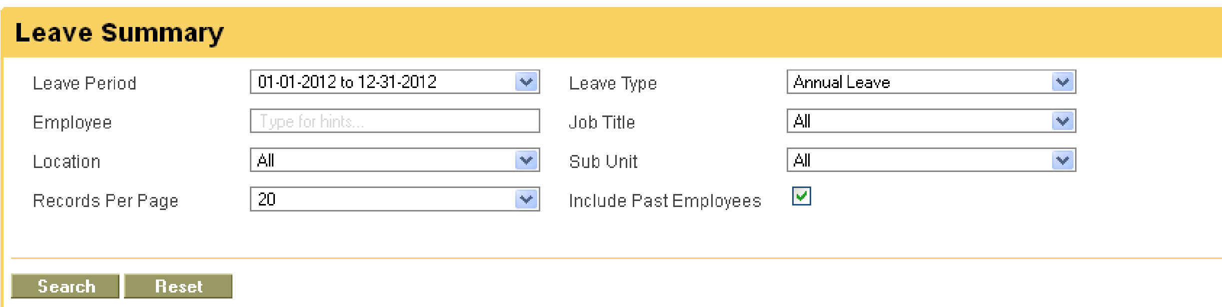
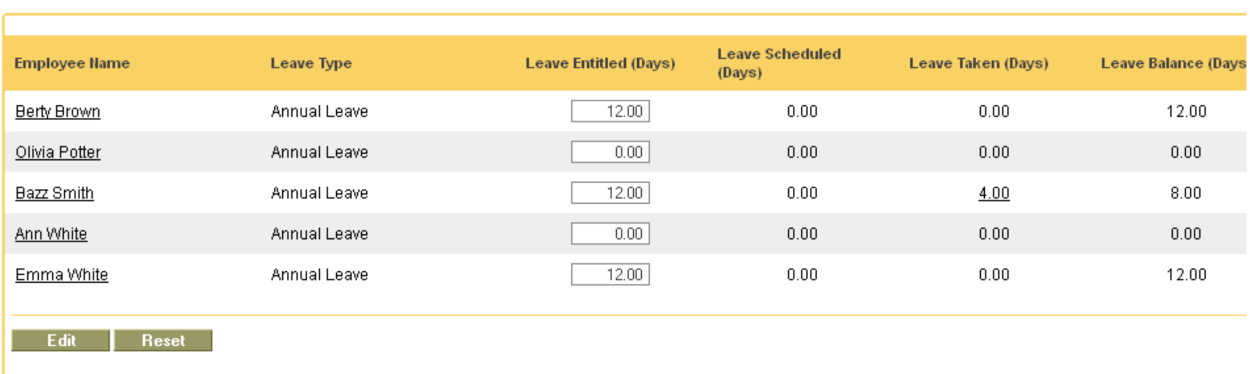


Figure 11.7: Leave Summary Search Toolbar

The list as shown in Figure 11.8 shows the data that was run by the search toolbar.
Click "Edit" to enter the "Leave Entitlement" for a particular leave type for each employee.

Click "Save" once the fields are added.



Employee Name	Leave Type	Leave Entitled (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days
Berty Brown	Annual Leave	12.00	0.00	0.00	12.00
Olivia Potter	Annual Leave	0.00	0.00	0.00	0.00
Bazz Smith	Annual Leave	12.00	0.00	4.00	8.00
Ann White	Annual Leave	0.00	0.00	0.00	0.00
Emma White	Annual Leave	12.00	0.00	0.00	12.00

Figure 11.8: Define Leave Entitlement

Click "Edit" to enter leave entitlements the following leave types for each employee.
Click "Save "once the fields are entered.

- ESS-Supervisor View of Leave Summary

An ESS –Supervisor is only able to “View” his own leave summary and his subordinate when he/she logs in. To view leave summary, go to **Leave>> Leave Summary** and a screen as shown in Figure 11.9 will appear.

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

Employee Name	Leave Type	Leave Entitled (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Day
Berty Brown	Annual Leave	12.00	0.00	0.00	12.00
Berty Brown	Casual Leave	6.00	0.00	2.00	4.00
Berty Brown	Lieu Leave	2.00	2.00	0.00	0.00
Berty Brown	Maternity Leave	0.00	0.00	0.00	0.00
Berty Brown	Medical Leave	6.00	0.00	0.00	6.00
Bazz Smith	Annual Leave	12.00	0.00	4.00	8.00
Bazz Smith	Casual Leave	6.00	0.00	0.00	6.00
Bazz Smith	Lieu Leave	2.00	0.00	0.00	2.00
Bazz Smith	Maternity Leave	0.00	0.00	0.00	0.00
Bazz Smith	Medical Leave	6.00	5.50	0.00	0.50
Emma White	Annual Leave	12.00	0.00	0.00	12.00
Emma White	Casual Leave	6.00	0.00	0.00	6.00
Emma White	Lieu Leave	2.00	0.00	0.00	2.00
Emma White	Maternity Leave	0.00	0.00	0.00	0.00

Figure 11.9: ESS-Supervisor View of Leave Summary

ESS-Employee View of Leave Summary

An ESS-Employee is only able to “View” his leave summary when he/she logs in. To view, go to **Leave>> Leave Summary** and a screen as shown in Figure 12.0 will appear.

Employee Name	Leave Type	Leave Entitled (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Da
Emma White	Annual Leave	12.00	0.00	0.00	12.00
Emma White	Casual Leave	6.00	0.00	0.00	6.00
Emma White	Lieu Leave	2.00	0.00	0.00	2.00
Emma White	Maternity Leave	0.00	0.00	0.00	0.00
Emma White	Medical Leave	6.00	0.00	0.00	6.00

Figure 12.0: ESS-Employee View of Leave Summary

7.3 Leave List

The leave list is available to the Admin and ESS – Supervisors. It shows the entire leave request by the employees.

*Note: The ESS – Supervisor will only see the leave list of his subordinates while the Admin can view the entire list.

View/Action Leave Request

When an employee applies for a leave his Supervisor and Admin will receive a mail with a link to the leave list and upon clicking on that link either the Supervisor or the Admin can approve, reject or cancel the leave.

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

To view “Leave List”, go to Leave>>Leave List and the screen as shown in Figure 12.1 will appear. You may also action the following leave request by selecting an action from the “Action” drop down menu.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
09-12-2012 to 09-14-2012	Emma White	Annual Leave	12.00	3.00	Pending Approval(3)		Select Action
05-02-2012 to 05-03-2012	Berty Brown	Casual Leave	4.00	2.00	Pending Approval(2)	My mother's bday	Select Action Select Action Approve Reject Cancel

Save

Figure 12.1: HR Admin Leave List

Click “Save” once an action has been selected. The following leave request in which an action has been applied will no longer appear in the leave list as shown in Figure 12.2. A mail will be then sent to the employee and he can view the status of his leave application.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Action
No Records Found							

Save

Figure 12.2: Leave Status Notified to Employee.

Alternatively, you may action the following leave request by selecting an action from the drop down menu of “Actions” or you may click the “Date”/ “Employee Name” / “Status” to view the a detailed information of the leave request and action them individually as shown in Figure 12.3. Select necessary actions to the leave request and click “Save”

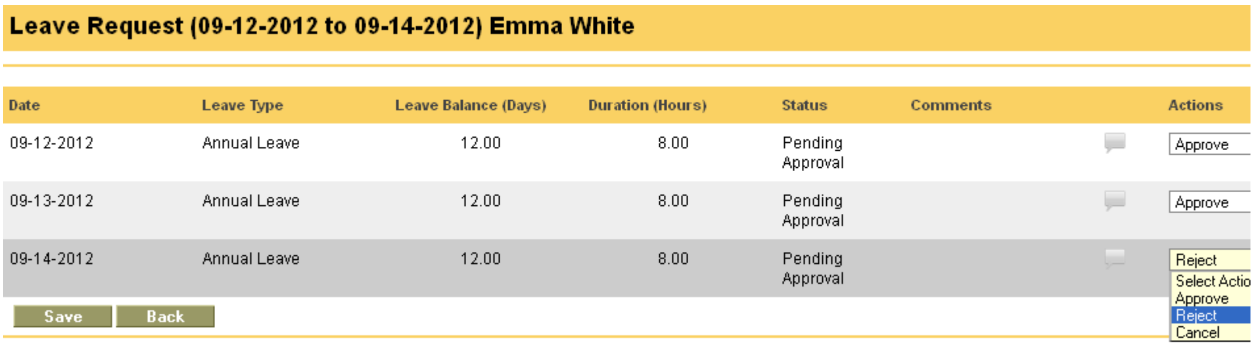


Figure 12.3: Leave Request in Details

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

Search Leave List

You can view leave using the search toolbar as shown in Figure 12.4 by:

- Specifying the period using the “From” and “To” dates
- Selecting the status or combination of status of the following:
  - Rejected
  - Canceled
  - Pending Approval
  - Approved
  - Taken
- Search for the employee
- Search by Sub-Unit
- You may also include past employees with your search.

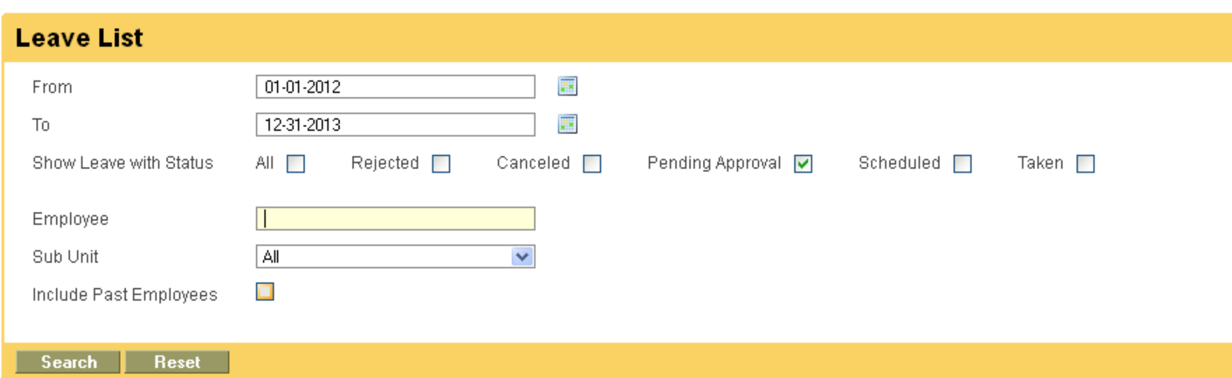


Figure 12.4: Leave List Search

7.4 Assign Leave

This feature is only available to an HR Admin and ESS-Supervisor. The HR Admin can assign leave to all employees while an ESS-Supervisor can only assign leave to his subordinates. To assign leave, go to **Leave>> Assign Leave** and the screen as shown in Figure 12.5 will appear.

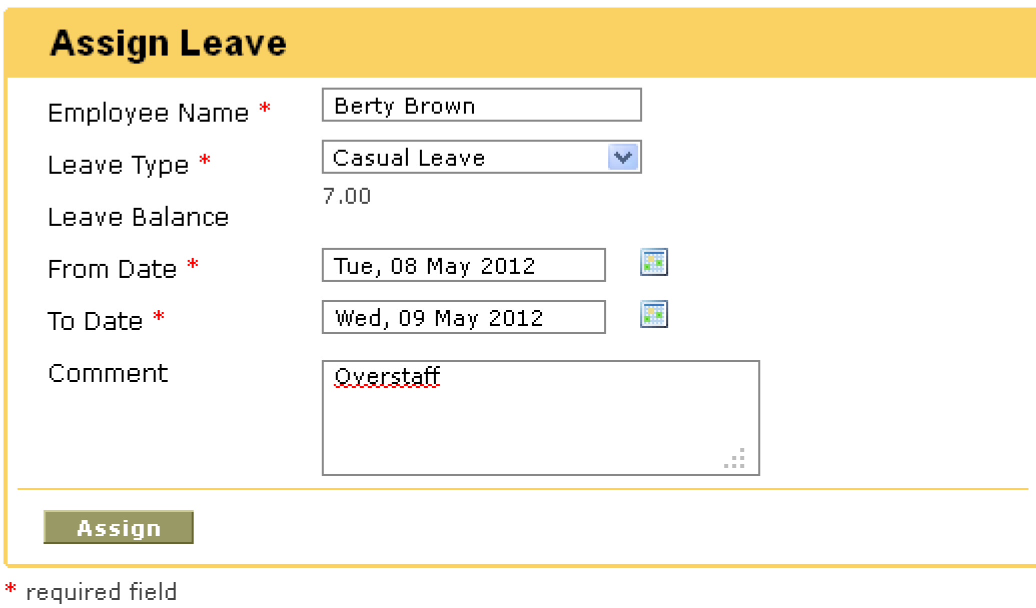


Figure 12.5: Assign Leave

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

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

When the employee logs in to the system and checks his/her leave by going to **Leave>> My Leave**, he/she will see the leave that was assigned to him/her as shown in Figure 12.6.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments		Actions
Wed, 12 Sep 2012 to Thu, 13 Sep 2012	Berty Brown	Lieu Leave	0.00	2.00	Scheduled(2)			Select Action
Thu, 14 Jun 2012 to Fri, 15 Jun 2012	Berty Brown	Annual Leave	6.00	2.00	Rejected(2)			
Tue, 08 May 2012 to Wed, 09 May 2012	Berty Brown	Casual Leave	5.00	2.00	Scheduled(2)	Overstaff		Select Action
Wed, 02 May 2012 to Thu, 03 May 2012	Berty Brown	Casual Leave	5.00	2.00	Scheduled(2)	My mother's bday		Select Action
Thu, 26 Apr 2012 to Fri, 27 Apr 2012	Berty Brown	Casual Leave	5.00	2.00	Taken(2)			

Save

Figure 12.6: ESS-Employee "My Leave" View

7.5 My Leave

This menu item is available for ESS Users and ESS Supervisors. Personal leave details can be viewed here. To view "My Leave" go to **Leave>> My Leave** and the screen as shown in Figure 12.7 will appear.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments		Actions
Wed, 12 Sep 2012 to Thu, 13 Sep 2012	Berty Brown	Lieu Leave	0.00	2.00	Scheduled(2)			Select Action
Thu, 14 Jun 2012 to Fri, 15 Jun 2012	Berty Brown	Annual Leave	6.00	2.00	Rejected(2)			
Tue, 08 May 2012 to Wed, 09 May 2012	Berty Brown	Casual Leave	5.00	2.00	Scheduled(2)	Overstaff		Cancel
Wed, 02 May 2012 to Thu, 03 May 2012	Berty Brown	Casual Leave	5.00	2.00	Scheduled(2)	My mother's bday		Select Action
Thu, 26 Apr 2012 to Fri, 27 Apr 2012	Berty Brown	Casual Leave	5.00	2.00	Taken(2)			

Save

Figure 12.7: My Leave View

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

He/She can view complete details of leaves by clicking on the "Date", "Employee Name" or "Status" To make a status change click on the drop down select "Cancel" and click "Save".

If the email notifications functionality has been configured (see section 3.7 for more information), email notifications on leave application, cancellations, rejections and approvals will be sent to the employee, who has applied for leave, and to the Admin Users, who have subscribed for the leave management mail notifications.

7.6 Apply

All users except for the Admin unless he is an employee can apply leave from this option. To apply for a leave go to **Leave>>Apply** and the screen shown as shown in Figure 12.8 will appear.

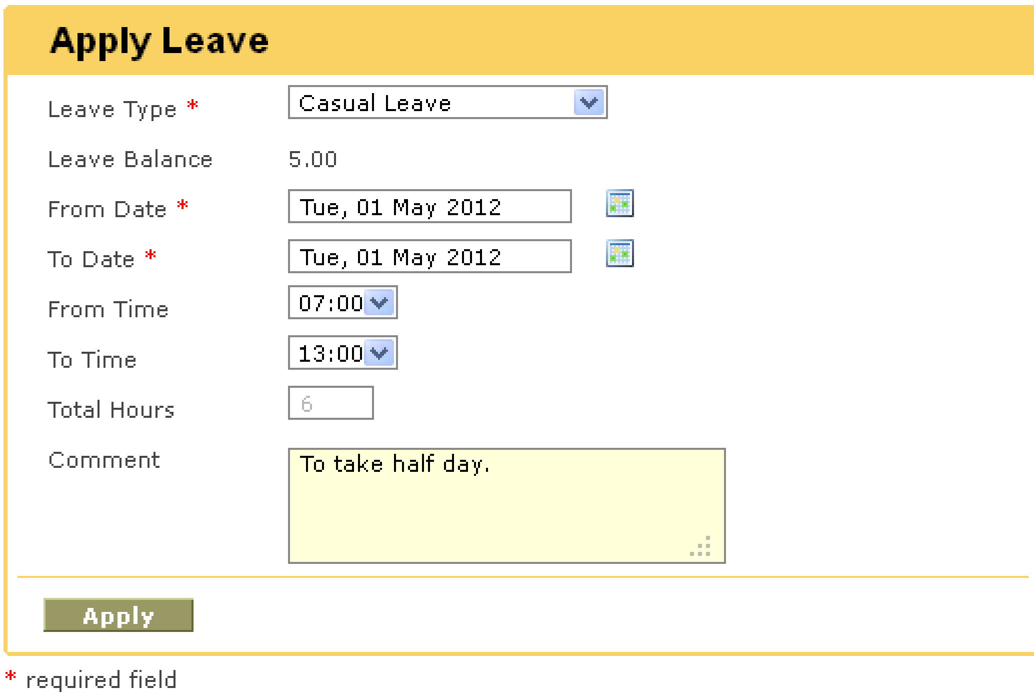
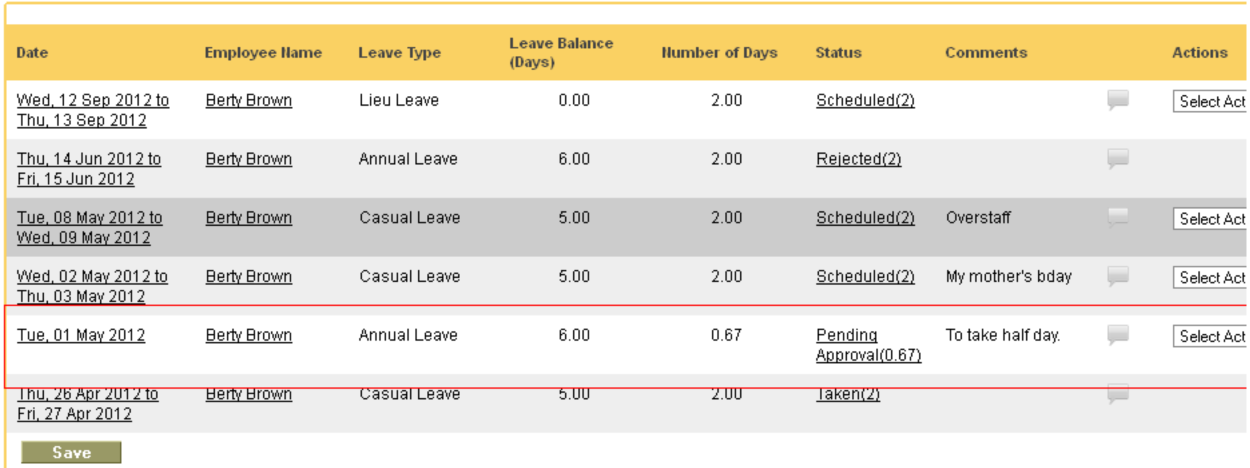


Figure 12.8: Apply Leave

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

Once you have filled in the details click "Apply" and a mail will be sent to the Supervisor and the Admin for approval. The status of your leave application can be seen in "My Leave" as shown in Figure 12.9.



Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments		Actions
Wed, 12 Sep 2012 to Thu, 13 Sep 2012	Berty Brown	Lieu Leave	0.00	2.00	Scheduled(2)			Select Act
Thu, 14 Jun 2012 to Fri, 15 Jun 2012	Berty Brown	Annual Leave	6.00	2.00	Rejected(2)			
Tue, 08 May 2012 to Wed, 09 May 2012	Berty Brown	Casual Leave	5.00	2.00	Scheduled(2)	Overstaff		Select Act
Wed, 02 May 2012 to Thu, 03 May 2012	Berty Brown	Casual Leave	5.00	2.00	Scheduled(2)	My mother's bday		Select Act
Tue, 01 May 2012	Berty Brown	Annual Leave	6.00	0.67	Pending Approval(0.67)	To take half day.		Select Act
Thu, 26 Apr 2012 to Fri, 27 Apr 2012	Berty Brown	Casual Leave	5.00	2.00	Taken(2)			

Save

Figure 12.9: My Leave View

8.0 Time Module

The Time Module automates attendance maintenance and punch in/out. The functionality of the module allows the employees of the company to create and submit weekly timesheets and the Supervisors to modify, approve and reject the timesheets.

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

Depending on each user the functions vary:

The Admin can:

- View / Edit / Approve / Reject Employee Timesheets
- View any employee's attendance records.
- Configure attendance settings for all employees
- View project reports for any project undertaken by the company

The ESS – Supervisor can:

- Enter, modify and submit personal timesheets
- View / Edit / Approve / Reject/Add timesheets of his subordinates

- Enter his/her punch in/out time
- Enter time events spent on the project activities
- View his subordinates' employee attendance records.
- View subordinate's project reports and attendance summary.

The ESS User can:

- Enter, modify and submit personal timesheets
- Enter punch in/out time
- Enter the time events for the activities of the projects he/she is working on.

8.1 Time Sheets

Entering and Submitting a Timesheet

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

When an ESS-Employee or an ESS-Supervisor wants to enter his/her timesheet, they can go to **Time>> Timesheet>> My Timesheets** and the screen as shown in Figure 13.0 will appear. This option is not available to the Admin.

Figure 13.0: Enter Timesheet

The current week will populate under the "Timesheet for week". You may also add a timesheet for another week period by clicking "Add Timesheet" and another field, "Select a Day to Create Timesheet" will appear in which you can select the first day of the week from the drop down menu and the system will automatically calculate a one-week time period from the date entered as shown in Figure 13.0.

*Note: Once you have added a timesheet for a specific week, you cannot move from one timesheet of a specific week period to another unless you have entered the details for the current one.

Once you have determined the week period for the timesheet, you can now enter the timesheet details by clicking “Edit” and the screen as shown in Figure 13.1 will appear.

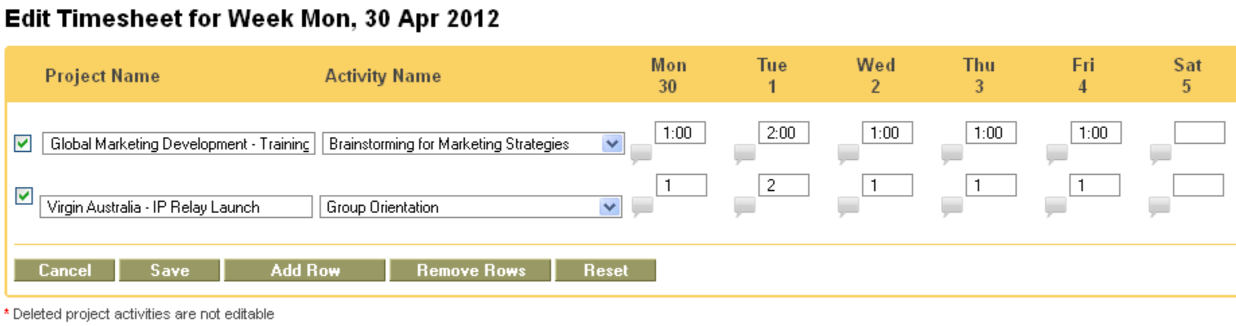


Figure 13.1: Edit Timesheet

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

They can select from the “Project Name” and “Activity Name” that was assigned to him/her and enter the number of hours spent for each activity for the whole week. You may also add a row by clicking “Add Row” to enter another timesheet record for another project activity.

Click on the checkbox beside the project name before you click “Save” to save the following records and the screen as shown in Figure 13.2 will appear.

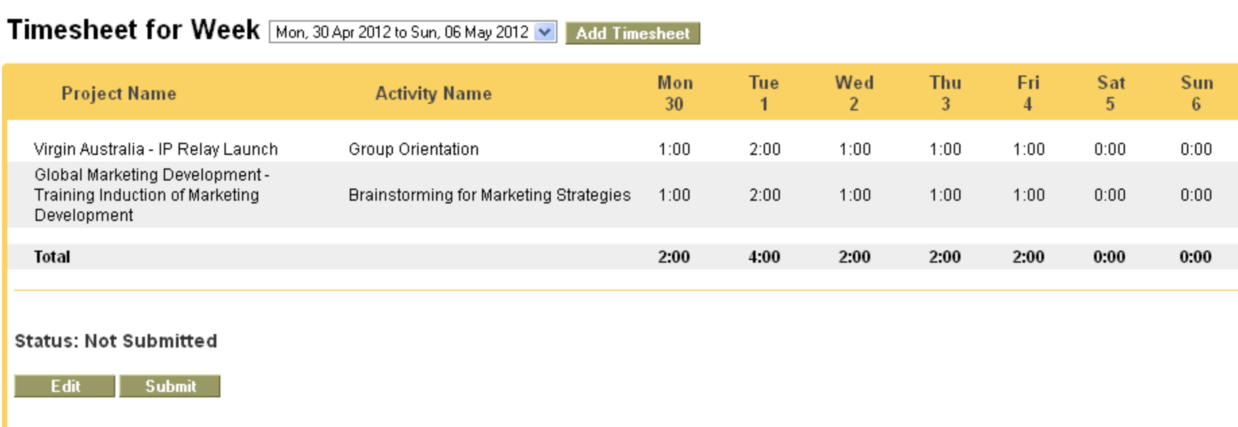


Figure 13.2: Save Timesheet

You may also remove a particular record after the timesheet has been saved by clicking “Edit” and the screen as shown in Figure 13.3 will appear. Click on the checkbox for the particular row you want removed and click “Remove Rows” and the record will no longer appear on the timesheet record.

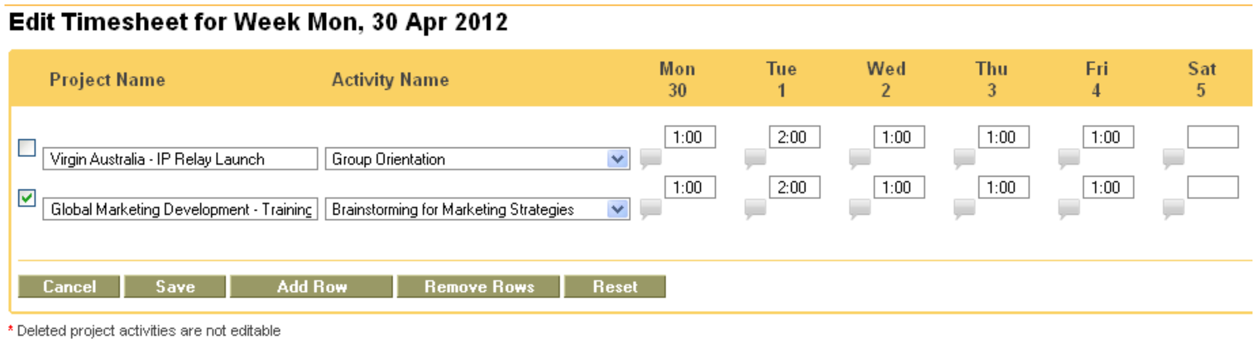


Figure13.3: Remove Rows

Once the necessary changes have been made, click “Submit” to submit the completed timesheet and you will see the status change from “Not Submitted” to “Submitted” as shown in Figure 13.4

Figure 13.4: Submit Timesheet

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

Once the timesheet has been submitted it will be sent to the HR Admin (if the HR Admin has subscribed to the following notification type) and his/her supervisor.

Approving Employee Timesheet

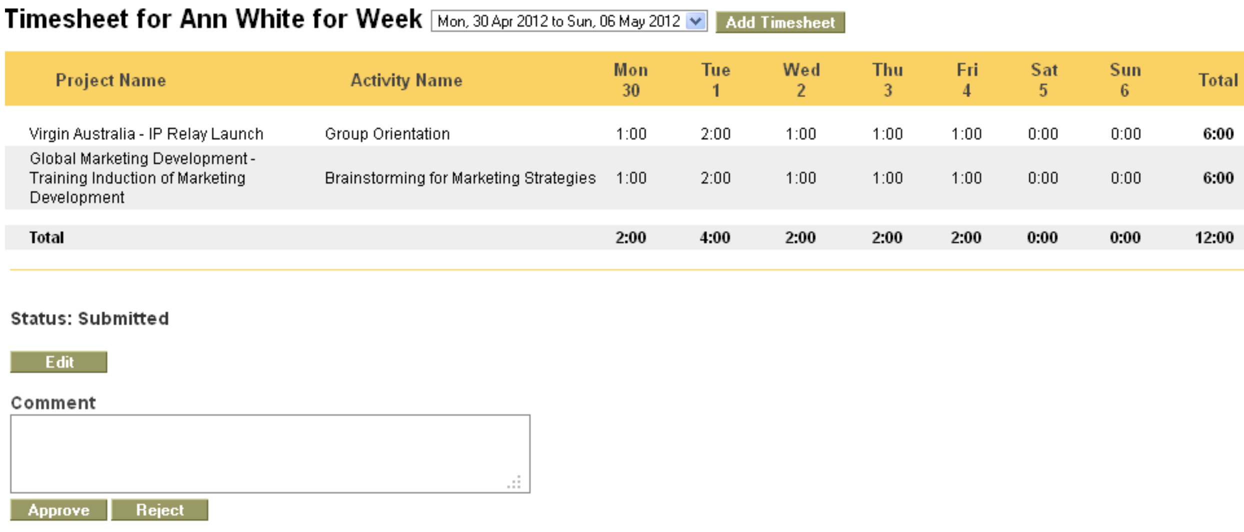
ESS-Supervisor Approve/Reject Timesheet

When an employee submits a time sheet it will be sent to his supervisor. The supervisor will see the submitted timesheets by going to **Time>> Timesheets>> Employee Timesheets** and the screen as shown in Figure 13.5 will appear. The ESS-Supervisor will only see the timesheets submitted by his/her subordinate.

Figure 13.5: ESS Supervisor View Timesheet Details

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

Timesheet with pending action can also be viewed on the screen. Click "View" to see the details of the timesheet under "Timesheets Pending Action" and the screen as shown in Figure 13.6 will appear.



Timesheet for Ann White for Week Mon, 30 Apr 2012 to Sun, 06 May 2012 | Add Timesheet

Project Name	Activity Name	Mon 30	Tue 1	Wed 2	Thu 3	Fri 4	Sat 5	Sun 6	Total
Virgin Australia - IP Relay Launch	Group Orientation	1:00	2:00	1:00	1:00	1:00	0:00	0:00	6:00
Global Marketing Development - Training Induction of Marketing Development	Brainstorming for Marketing Strategies	1:00	2:00	1:00	1:00	1:00	0:00	0:00	6:00
Total		2:00	4:00	2:00	2:00	2:00	0:00	0:00	12:00

Status: Submitted

Edit

Comment

Approve | Reject

Figure 13.6: ESS-Supervisor View/Edit/Approve/Reject Timesheet

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

Once approved or rejected the particular employee will also be updated with the status and the status will change from "Submitted" to either "Approved" or "Rejected". The action performed by the supervisor will then be listed under "Actions Performed on the Timesheet" as shown in Figure 13.7.

Actions Performed on the Timesheet

Action	Performed By	Date	Comment
Submitted	Ann White	Wed, 02 May 2012	
Approved	Olivia Potter	Wed, 02 May 2012	OK

Figure 13.7: Actions Performed on the Timesheet by ESS-Supervisor

HR Admin Approve/Reject Employee Timesheet

The HR Admin can view all employees' timesheet. When an employee submits a time sheet, the HR Admin and other users with admin rights can also View / Edit / Approve / Reject an Employee Timesheets. To action an employee timesheet, go to **Time>> Time Sheets>> Employee Time Sheets** and the screen as shown in Figure 13.8 will appear.

Figure 13.8: HR Admin View Timesheet Details

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

Timesheets with pending action can also be viewed on the screen. Click "View" to see the details of the each timesheet under "Timesheets Pending Action" and the screen as shown in Figure 13.9 will appear.

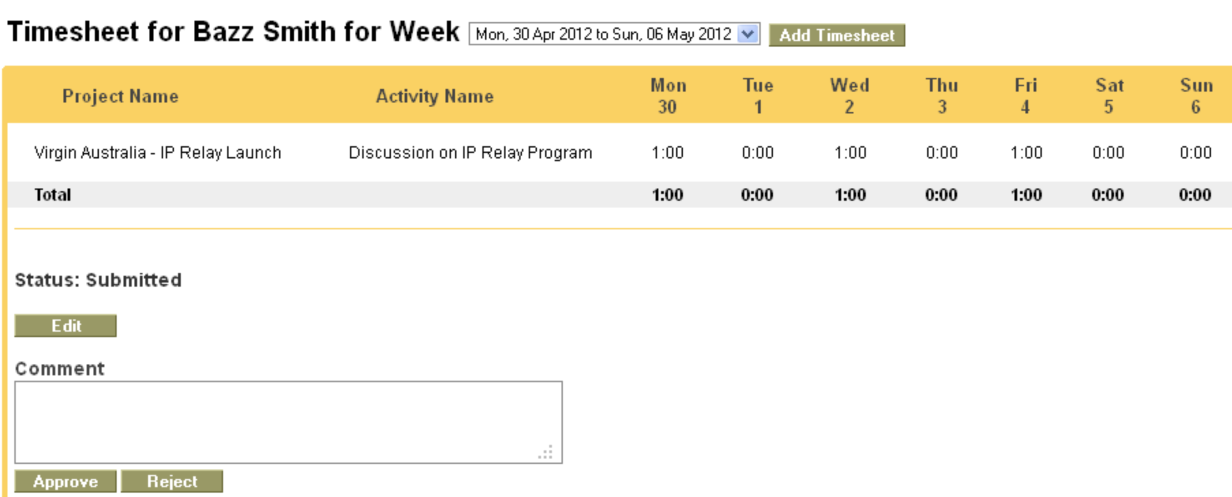


Figure 13.9: HR Admin View/Edit/Approve/R eject Timesheet

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

Once approved or rejected the particular employee will also be updated with the status and the status will change from "Submitted" to either "Approved" or "Rejected". The action performed by the HR Admin will then be listed under "Actions Performed on the Timesheet" as shown in Figure 14.0.

Actions Performed on the Timesheet

Action	Performed By	Date	Comment
Submitted	Bazz Smith	Wed, 02 May 2012	
Approved	Admin	Wed, 02 May 2012	Good

Figure 14.0: Actions Performed on the Timesheet by HR Admin

8.2 Attendance

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

The Admin can:

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

The ESS – Supervisor can:

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

The ESS User can:

- Punch In/Out
- View personal time reports.

Configuration

The admin can select what privileges the employees and supervisors will have on the punch in/out and attendance. For configuration, go to **Time>> Attendance>> Configuration** and the screen as shown in Figure 14.1 will appear.

Click “Save” once done.

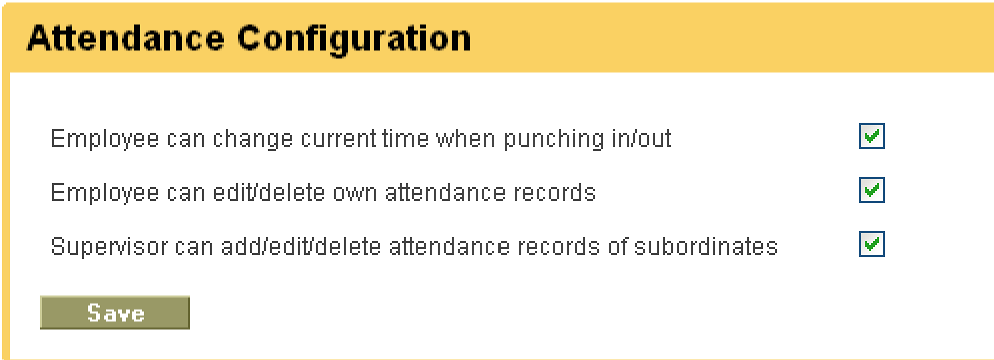


Figure 14.1: Attendance Configuration

Punch In/Punch Out

This feature allows capturing the number of hours an employee spends working for the company. This feature is only available to the ESS – Supervisor and ESS User. To access the Punch In/Out tab, go to **Time>> Attendance>>Punch In/Out** and the screen as shown in Figure 14.2 will appear.

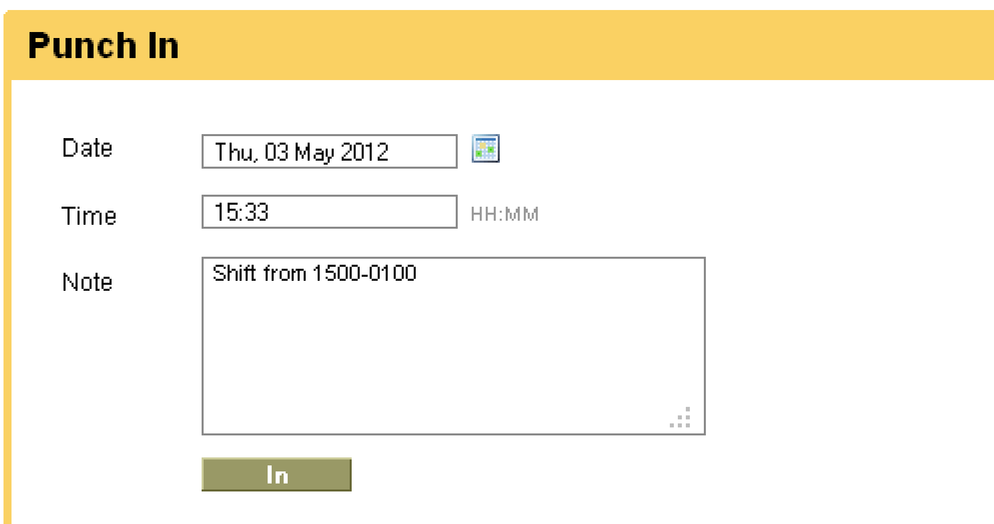


Figure 14.2: Punch In

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

Once you click "In" the screen as shown in Figure 14.3 will appear. To punch out, click "Out".

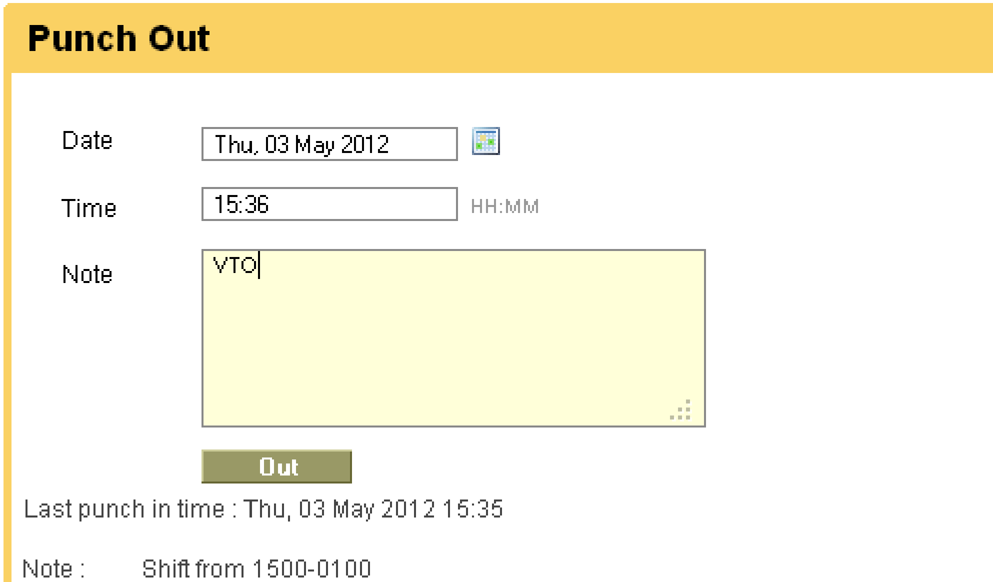


Figure 14.3: Punch Out

My Records

This feature is available to both ESS-Employee and ESS-Supervisor. Once you have punched in and punched out, the details of your personal attendance record will be shown under “My Records”. To view details, go to **Time>> Attendance>> My Records** and the screen as shown in Figure 14.4 will appear.

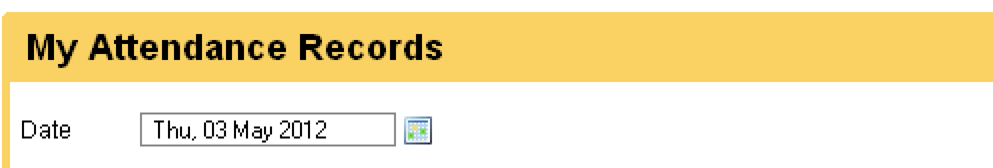


Figure 14.4: View My Records

Enter the date you want to view the attendance record and the screen as shown in Figure 14.5 will appear.

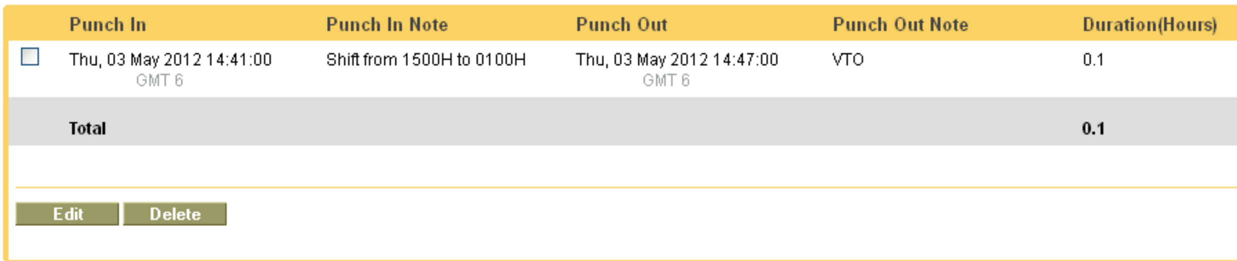


Figure 14.5: "My Records" in Details

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

Employee Records

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

To view employee records, go to **Time>> Attendance>> Employee Records** and the screen as shown in Figure 14.6 will appear.

Figure 14.6: View Employee Records

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

	Punch In	Punch In Note	Punch Out	Punch Out Note	Duration(Hours)
☐	Thu, 03 May 2012 15:04:00 GMT 6		Thu, 03 May 2012 15:07:00 GMT 6		0.05
	Total				0.05

Edit Delete Add Attendance Records

Figure 14.7: Employee Record in Details

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

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

*Note: To add another attendance record, click on the “Add Attendance Records twice for punch in and punch out.

8.3 Reports

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

- Project Report
- Employee Report
- Attendance Summary

Project Report

This feature is available to the Admin and ESS – Supervisors. The Admin can view can reports for all projects and the ESS – Supervisors can view reports of projects administered by them or projects assigned to them. To view project reports go to **Time>> Reports>> Project Reports** and the screen as shown in Figure 14.8 will appear.

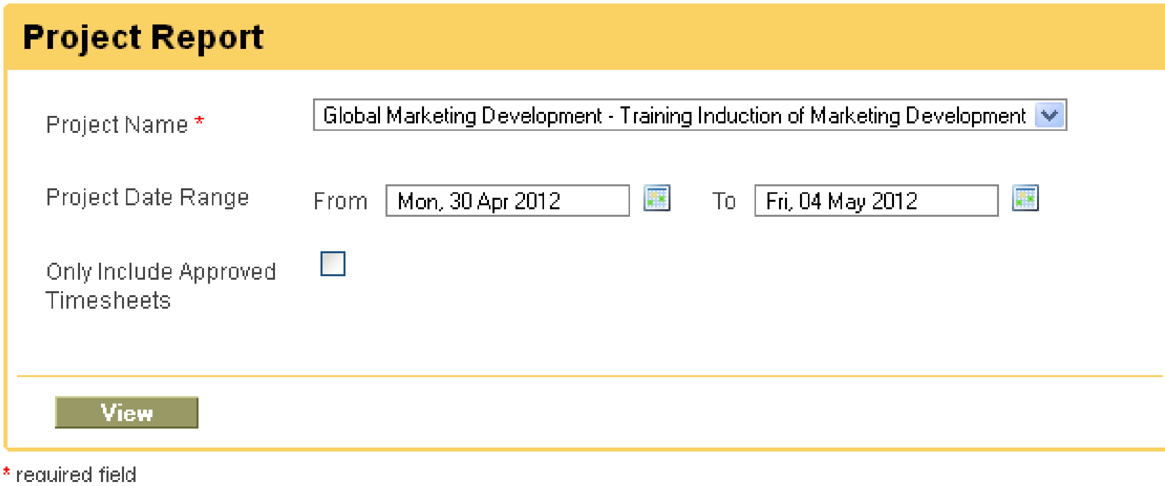


Figure 14.8: View Project Report

Select the "Project Name" from the drop down menu and the "Project Date Range" by selecting the dates. The default project name is "All". You may also click on the "Only Include Approved Timesheets" if you want to view only projects reports with approved timesheets. Click "View" once completed and the screen as shown in Figure 14.9 will appear.

Figure 14.9: Project Report

Employee Reports

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

To view an employee report, go to **Time>> Reports>>Employee Reports** and the screen as shown in Figure 15.0 will appear

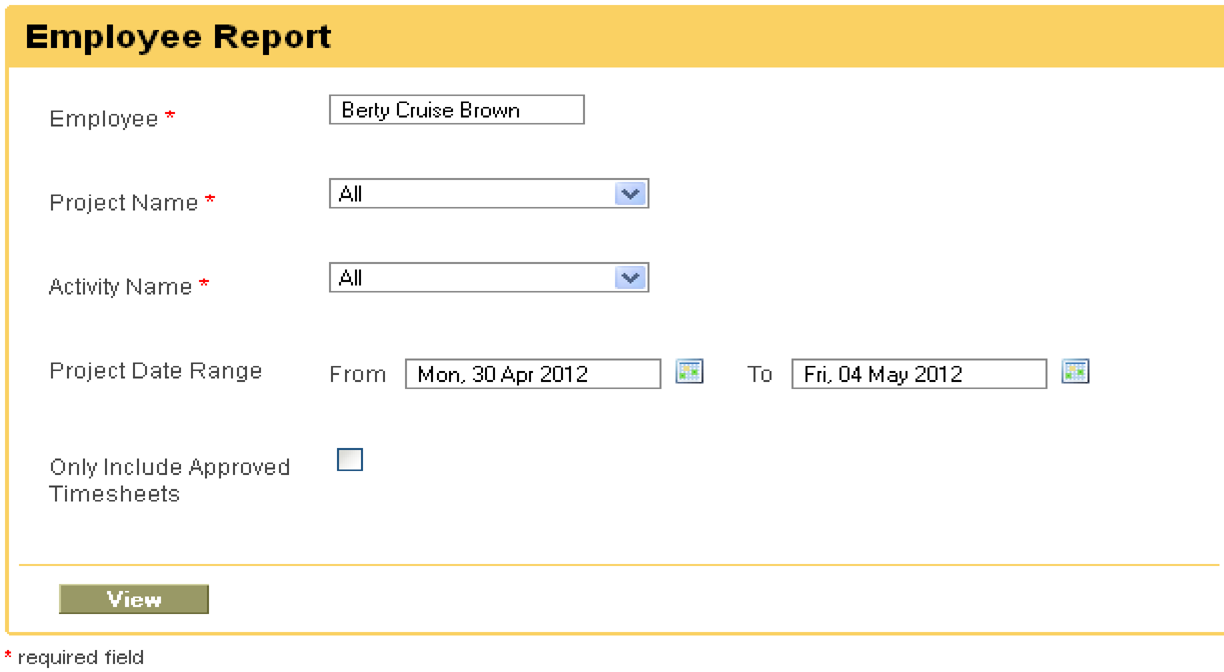


Figure 15.0: View Employee Report

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

Click “View” once completed and the screen as shown in Figure 15.1.

Employee Report

Employee Name Berty Cruise Brown

Project Name	Activity Name	Time (Hours)
Global Marketing Development - Training Induction of Marketing Development	Brainstorming for Marketing Strategies	10.00
Global Marketing Development - Training Induction of Marketing Development	Discussion on Marketing Strategies	16.30
Global Marketing Development - Training Induction of Marketing Development	Group Orientation	2.30
Virgin Australia - IP Relay Launch	Discussion on IP Relay Program	3.00
Virgin Australia - IP Relay Launch	Group Orientation	8.45
Total		40.05

Figure 15.1: Employee Report

Attendance Summary

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

To view an employee's attendance summary, go to **Time>> Reports>>Attendance Summary** and the screen as shown in Figure 15.2 will appear

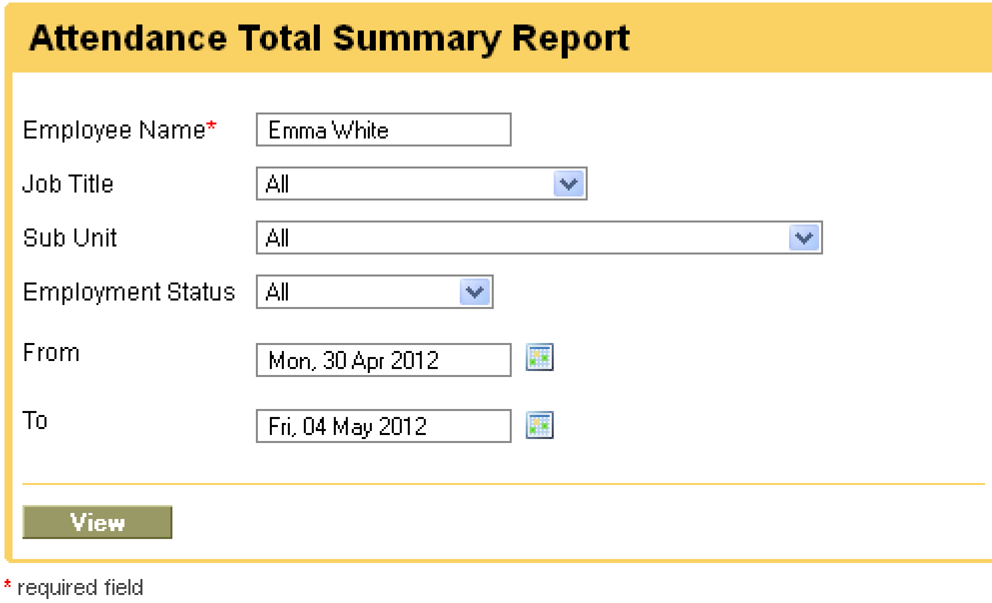


Figure 15.2: View Attendance Summary Report

Select the “Employee Name” from the drop down list, his/her “Job Title” and “Sub- Unit” he/she falls under and his/her “Employment Status”. The default job title/sub-unit/employment status is “All”. You may also select the date range you want to view the report for. Click “View” and the screen as shown in Figure 15.3 will appear.

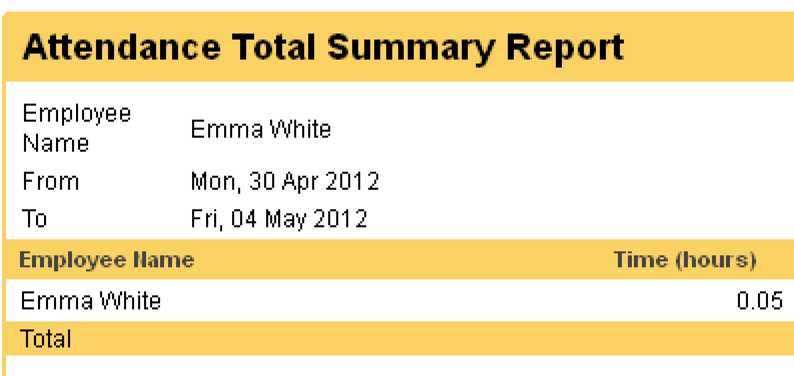


Figure 15.3: Attendance Summary Report

9.0 Recruitment Module

The Recruitment Module manages the recruitment process of a company. The Admin can create Vacancies which will be listed on the link via **jobs.php**. A link has to be made on the website to take the applicant to **jobs.php**. When applicants are rejected, approved or when interviews are scheduled, mails are sent to them. Successful applicants are added to the system.

9.1 Candidates

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

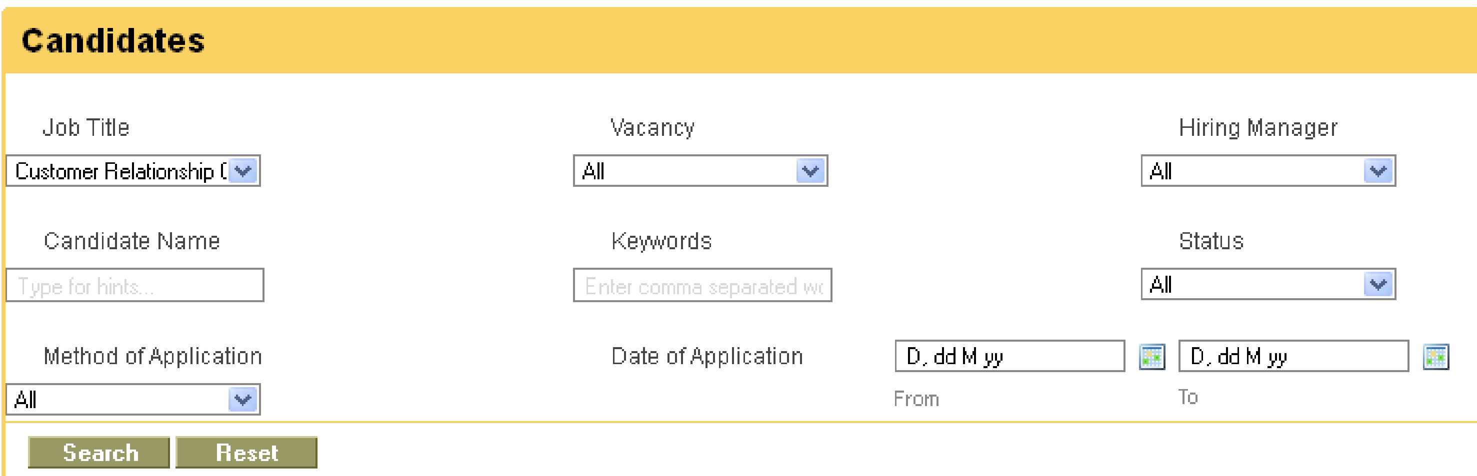


Figure 15.4: Candidates

- Job Title: search for the candidates who have applied for a specific job title that may not be necessarily posted.
- Vacancy: search for the candidates who have applied for a vacancy posted on the website.
- Hiring Manager: search for candidates with interviews with a particular hiring managers.
- Candidate Name: search for a particular candidate
- Keywords: search for candidates using specific keywords that the candidates may have entered on the application form for easy short-listing for a particular vacancy.
- Status: search for candidate with the following status of the application:
    - Application Initiated

- Shortlisted
- Interview Scheduled
- Interview Passed
- Interview Failed
- Job Offered
- Offer Declined
- Rejected
- Hired

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

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

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

Click ‘Search” to perform the candidate search.

Candidates List

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

Add | Delete

Click on a candidate to perform actions

	Vacancy	Candidate	Hiring Manager	Date of Application	Status	Resume
☐	Trainee Manager	Isabella Cook	Emma White	Sun, 29 Apr 2012	Application Initiated	Download
☐	Trainee Manager	Mark Lewis	Emma White	Sun, 29 Apr 2012	Application Initiated	Download
☐	Customer relationship officer	Olivia Potter	Emma White	Sun, 29 Apr 2012	Hired	Download
☐	Customer relationship officer	Andrew Harris	Emma White	Mon, 23 Apr 2012	Rejected	Download
☐	Trainee Manager	Julian Hudson	Emma White	Mon, 23 Apr 2012	Job Offered	Download
☐	Customer relationship officer	Mark Hudson	Emma White	Mon, 23 Apr 2012	Job Offered	Download

Figure 15.5: Candidates List

To view candidate’s application status details and perform an action click on the “Candidate” name and the screen as shown in Figure 15.6 will appear. Click “Edit” to select perform an action.

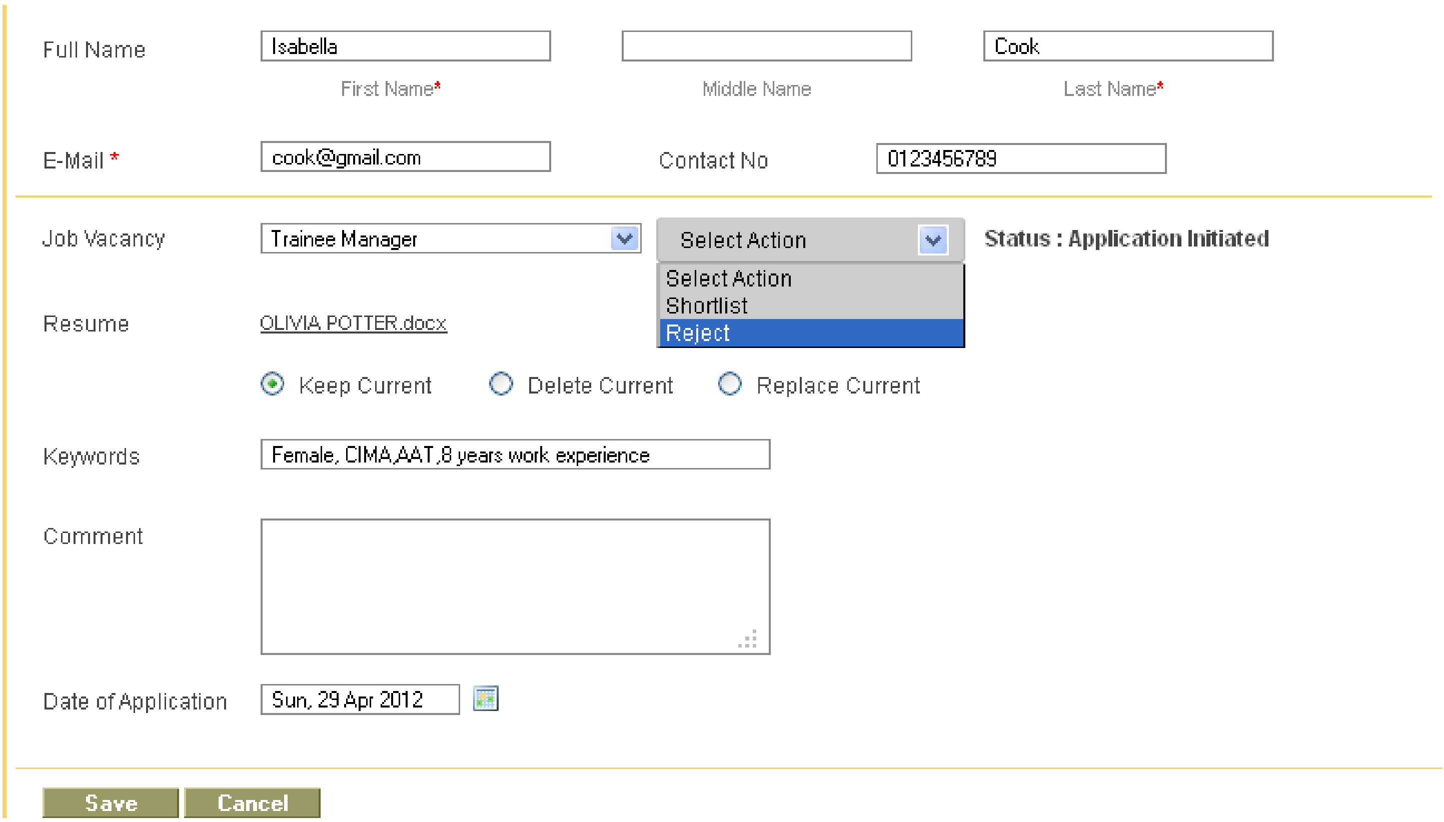


Figure 15.6: Candidate's Application Status Details

The following information will be populated on the screen:

- Full Name
- Email
- Contact No.
- Job Vacancy
- Status : You may select if you want to shortlist or reject the particular candidate
- Resume
    - Keep Current: You may retain the current resume
    - Delete Current: delete the current resume
    - Replace Current: replace current resume with another resume for which you will be prompted to upload another resume document.

Keywords: used to search for candidates with specific qualifications needed for a particular vacancy
Comment
Date of Application: date of which the application was created.

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

- Shortlist
- Reject

Shortlist

The Admin or the Hiring Manager can choose to shortlist a particular candidate; Select “Shortlist” from the “Action” drop down menu and the screen as shown in Figure 15.7 will appear.

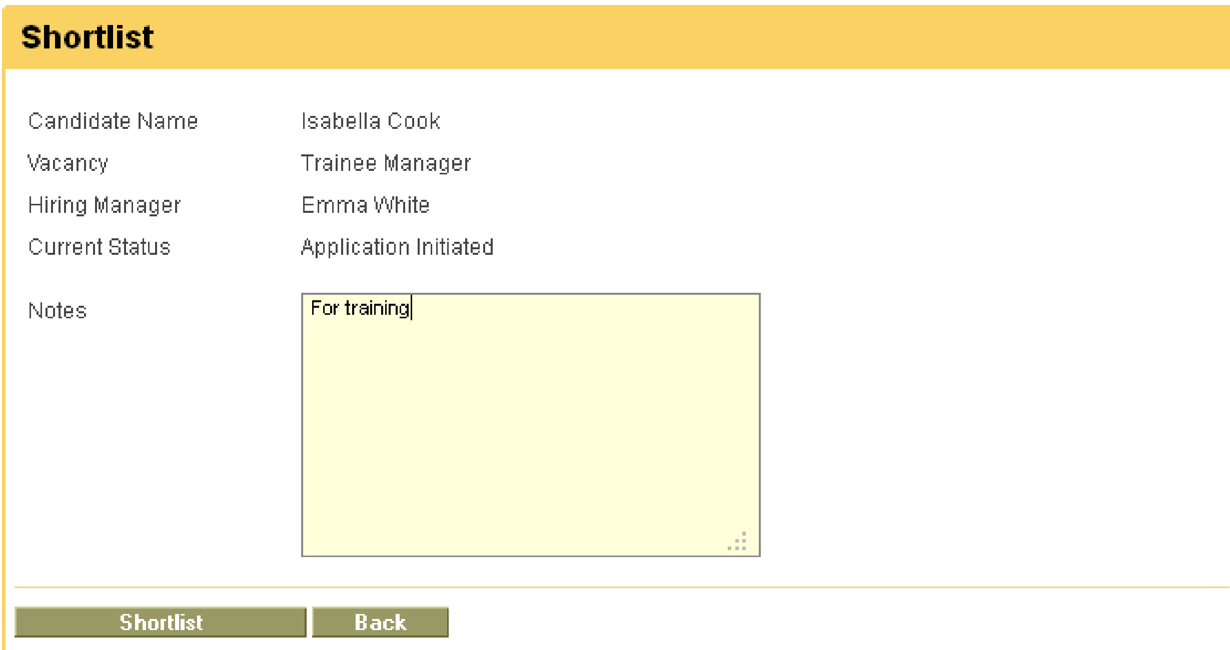


Figure 15.7: Shortlist

Click “Shortlist” to shortlist the candidate. Click “Back” to shown the candidate’s application history.

The following action will be reflected under “Candidate’s History” as shown in Figure 15.8.

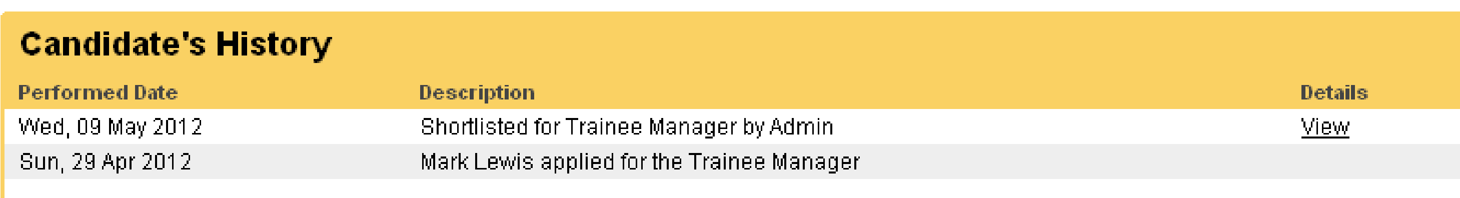


Figure 15.8: Candidate’s History

Reject

Alternatively, the Admin or Hiring Manager can turn down an application. To do so, select “Reject” from the “Action “drop down menu and click “Save” and the screen as shown in Figure 15.9 will appear.

Figure 15.9: Reject

Schedule Interview

Once a candidate is shortlisted, they can now be scheduled for an interview, to schedule an interview, select “Schedule Interview” from the “Action” drop down menu and the screen as shown in Figure 16.0 will appear.

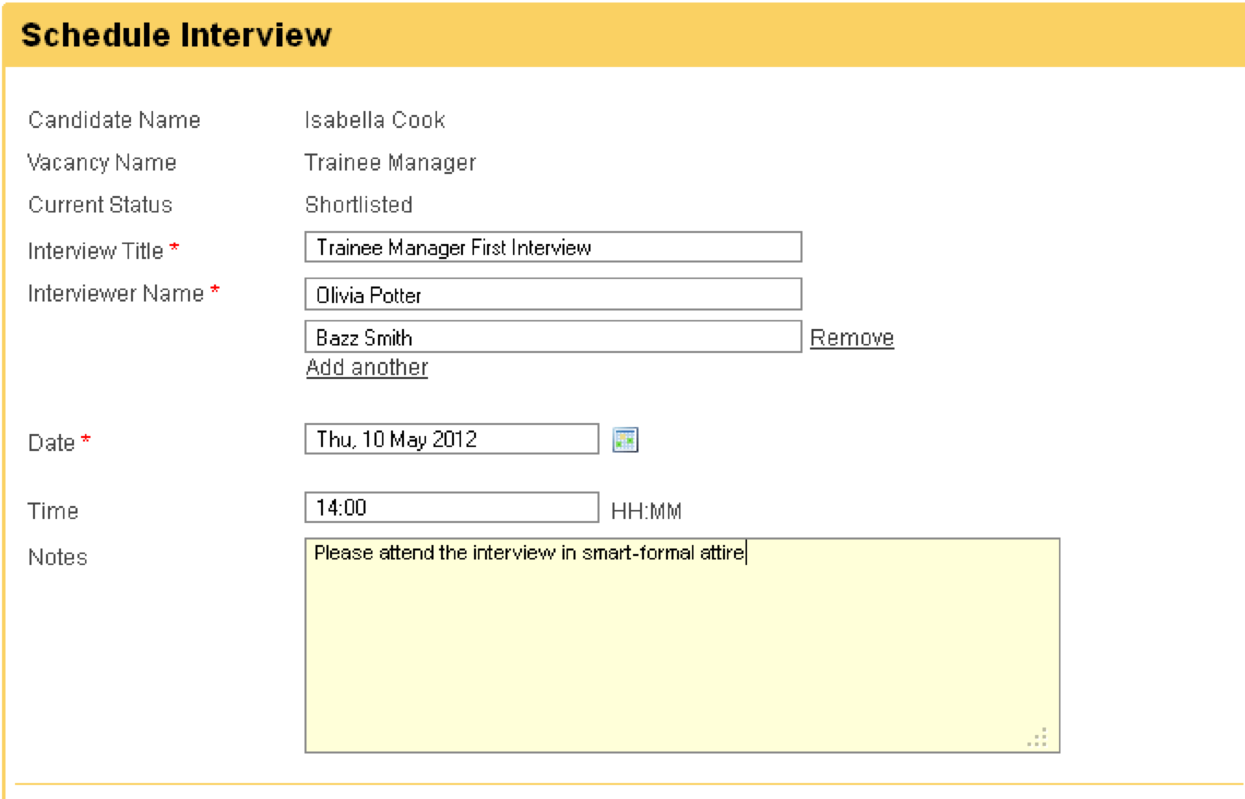


Figure 16.0: Schedule Interview

Enter the following fields and click "Save". Click "Back" and the following action will then be reflected under "Candidate's History" as shown in Figure 16.1.

Candidate's History

Performed Date	Description	Details
Wed, 09 May 2012	Admin scheduled Trainee Manager First Interview on Thu, 10 May 2012 at 14:00 with Bazz Smith, Olivia Potter for Trainee Manager	View
Wed, 09 May 2012	Shortlisted for Trainee Manager by Admin	View
Sun, 29 Apr 2012	Isabella Cook applied for the Trainee Manager	

Figure 16.1: Candidate's History

Mark Interview Passed

Once a candidate has completed his interview, the HR Admin or the Hiring Manager may pass or fail the candidate based on the interview. To mark interview as passed, select “Mark Interview Passed” from the “Action “drop down menu and the screen as shown in Figure 16.2 will appear.

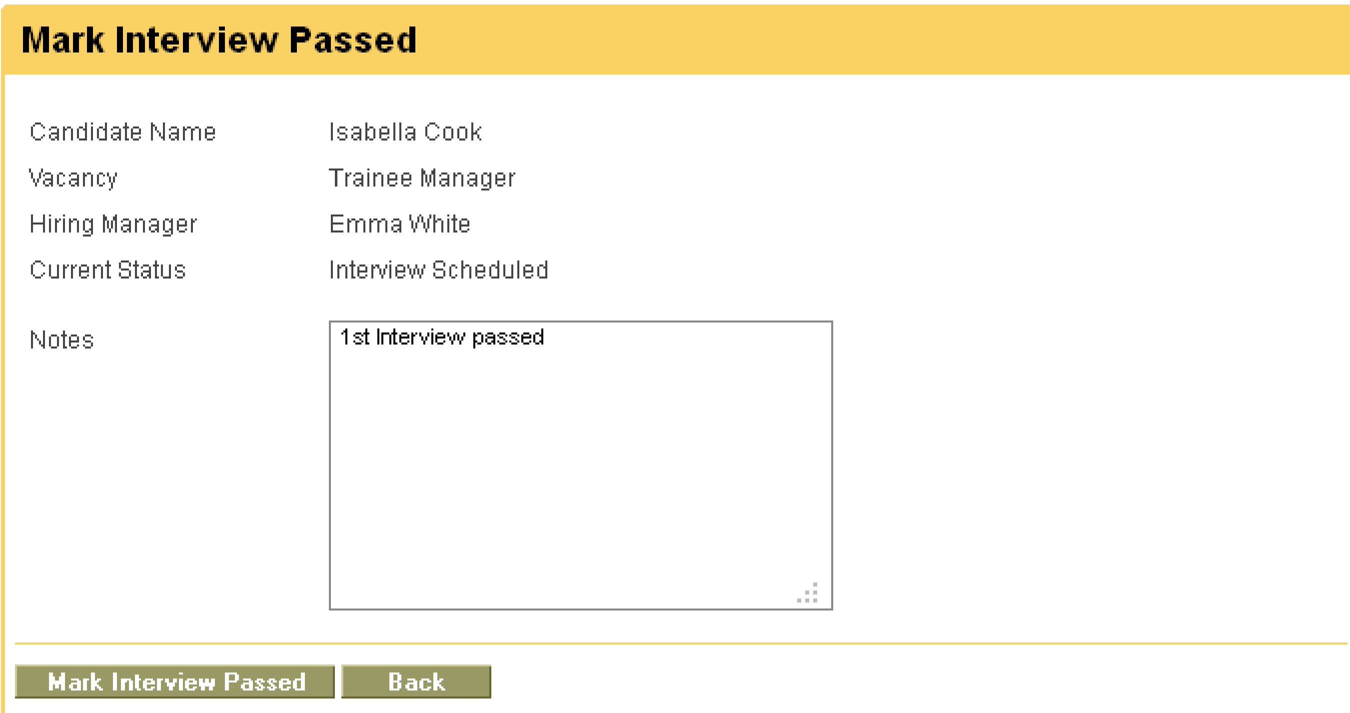
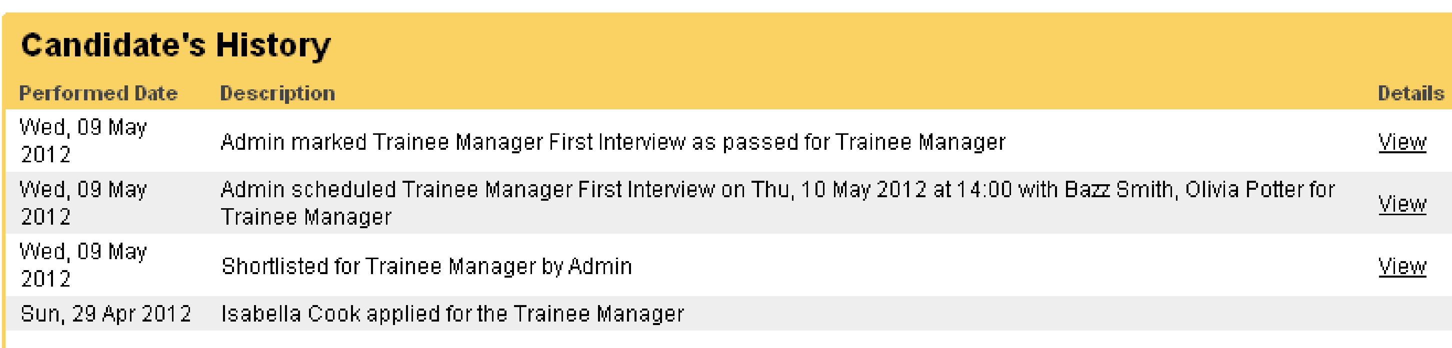


Figure 16.2: Mark Interview Passed

You may write a note and click “Mark Interview Passed” to confirm action.
Click ‘Back” and the following action will be reflected under “Candidate’s History” as shown in Figure 16.3.



Candidate's History

Performed Date	Description	Details
Wed, 09 May 2012	Admin marked Trainee Manager First Interview as passed for Trainee Manager	View
Wed, 09 May 2012	Admin scheduled Trainee Manager First Interview on Thu, 10 May 2012 at 14:00 with Bazz Smith, Olivia Potter for Trainee Manager	View
Wed, 09 May 2012	Shortlisted for Trainee Manager by Admin	View
Sun, 29 Apr 2012	Isabella Cook applied for the Trainee Manager	

Figure 16.3: Candidate’s History

Mark Interview Failed

The HR Admin or the Hiring Manager can also mark the interview failed. To do so, select “Mark Interview Failed” from the “Action” drop down menu and the screen as shown in Figure 16.4 will appear

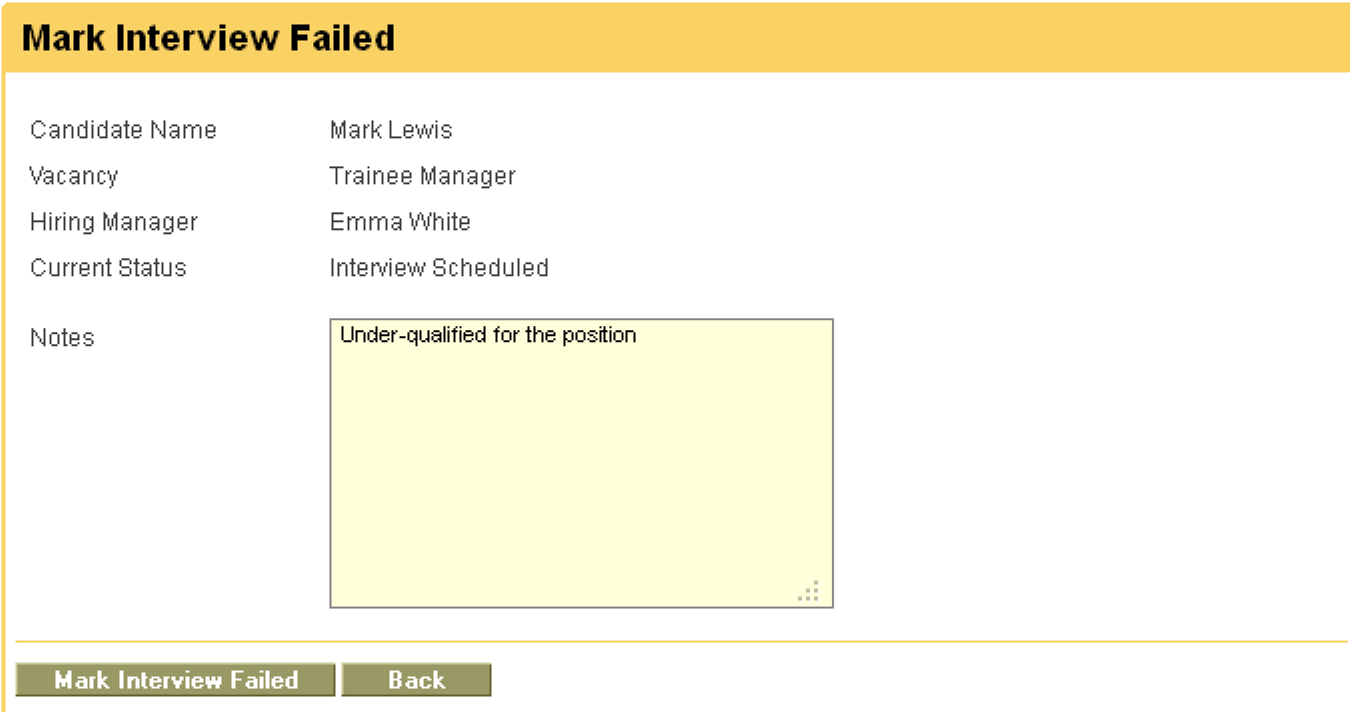


Figure 16.4: Mark Interview Failed

You may write a note and click “Mark Interview Failed” to confirm the action. Click “Back” and the action will be reflected under “Candidate’s History” as shown in Figure 16.5.

Candidate's History

Performed Date	Description	Details
Wed, 09 May 2012	Admin marked First Interview as failed for Trainee Manager	View
Wed, 09 May 2012	Admin scheduled First Interview on Thu, 10 May 2012 at 14:00 with Berty Cruise Brown for Trainee Manager	View
Wed, 09 May 2012	Shortlisted for Trainee Manager by Admin	View
Sun, 29 Apr 2012	Mark Lewis applied for the Trainee Manager	

Figure 16.5: Candidate’s History

Offer Job

The HR Admin or the Hiring Manager may offer the candidate the job. To do so, click “Edit” and select “Offer Job” from the “Action” drop down menu and the screen as shown in Figure 16.6 will appear.

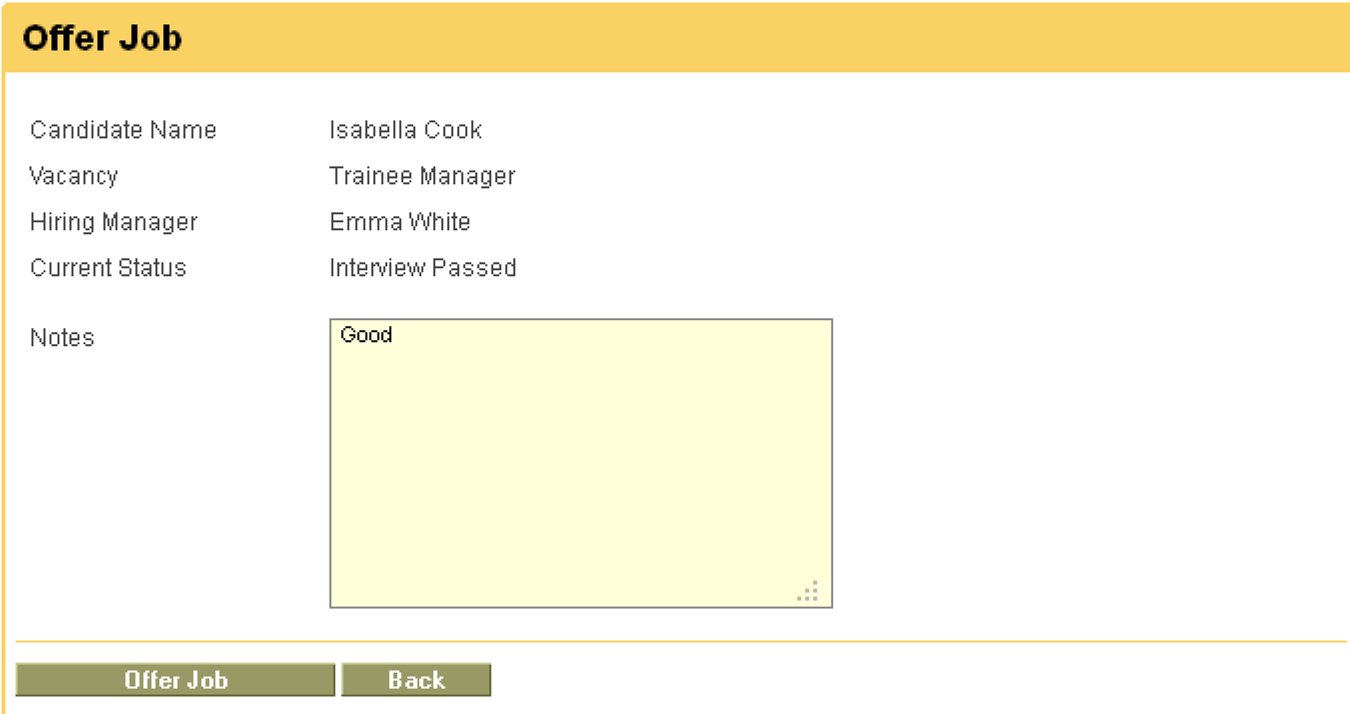
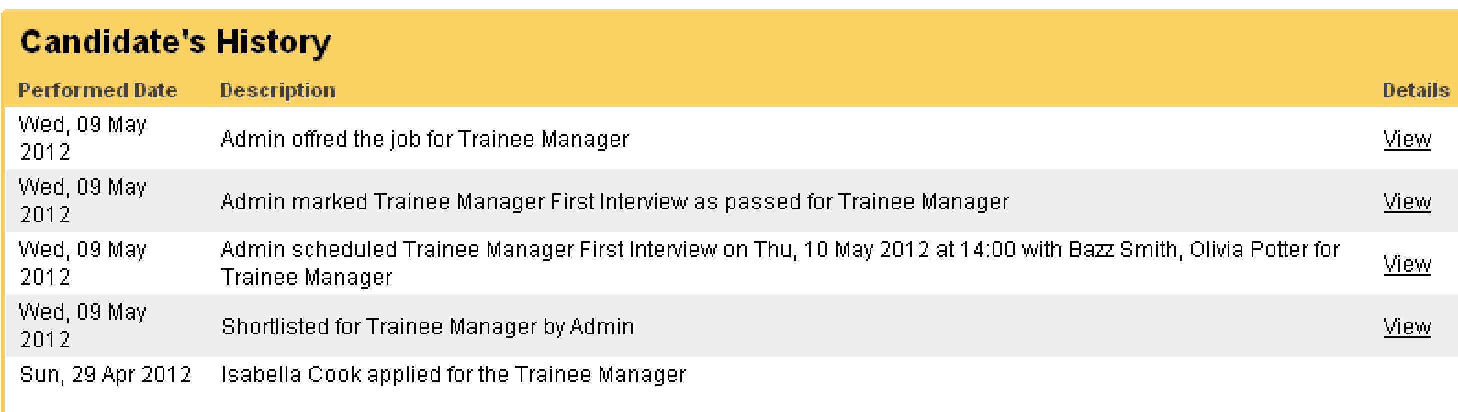


Figure 16.6: Offer Job

You may enter a note and click “Offer Job” to confirm the action. Click “Back” and the action will be reflected under Candidate’s History as shown in Figure 16.7.



Candidate's History

Performed Date	Description	Details
Wed, 09 May 2012	Admin offred the job for Trainee Manager	View
Wed, 09 May 2012	Admin marked Trainee Manager First Interview as passed for Trainee Manager	View
Wed, 09 May 2012	Admin scheduled Trainee Manager First Interview on Thu, 10 May 2012 at 14:00 with Bazz Smith, Olivia Potter for Trainee Manager	View
Wed, 09 May 2012	Shortlisted for Trainee Manager by Admin	View
Sun, 29 Apr 2012	Isabella Cook applied for the Trainee Manager	

Figure 16.7: Candidate’s History

Decline Offer

If incase the offer was declined by the applicant then it can be listed as a “Decline Offer”. To mark the application as decline offer, click “Edit” and select “Decline Offer” from the “Action” drop down menu and the screen as shown in Figure 16.8 will appear.

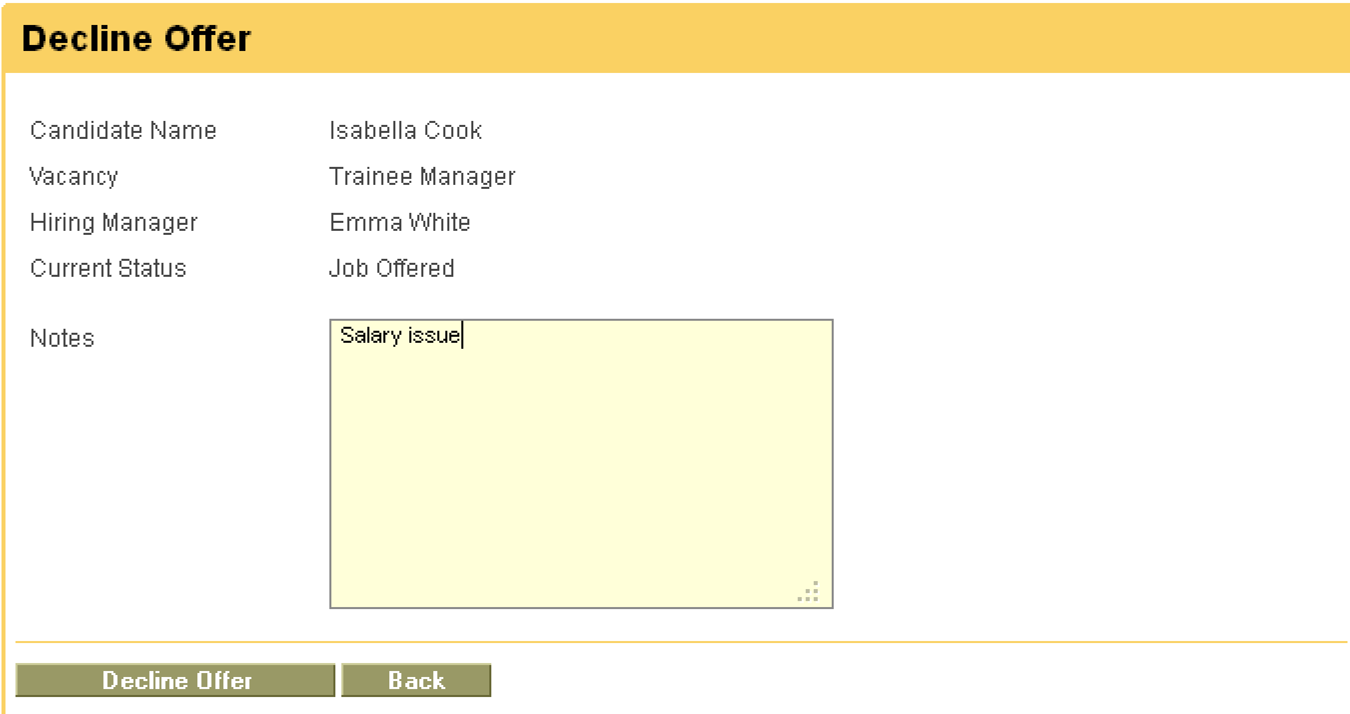


Figure 16.8: Decline Offer

You may enter a note and click "Decline Offer" to confirm the action. Click "Back" and the following action will be reflected under the Candidate's History as shown in Figure 16.9.

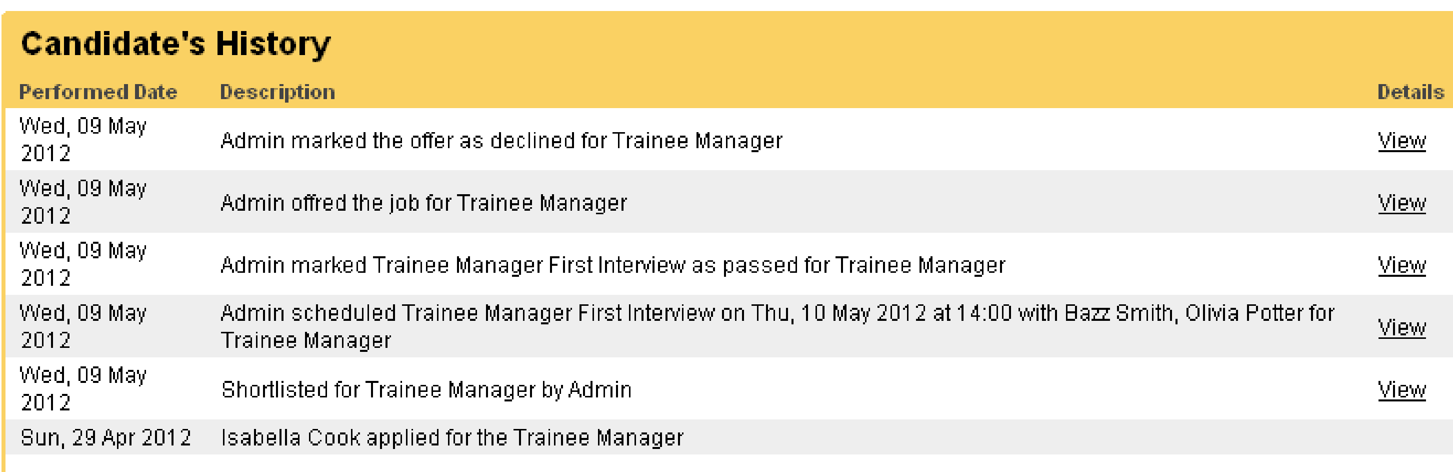


Figure 16.9: Candidate's History

Hire

The HR Admin or the Hiring Manager may choose to hire the candidate at this point. To hire the candidate, click “Edit” and select “Hire”from the “Action” drop down menu and the screen as shown in Figure 17.0 will appear.

Hire

Candidate Name	Julian Hudson
Vacancy	Trainee Manager
Hiring Manager	Emma White
Current Status	Job Offered
Notes	

Hire Back

Figure 17.0: Hire

You may add a note and click “Hire” to confirm the action. Click “Back” and the action will be reflected under “Candidate’s History as shown in Figure 17.1.

Candidate's History

Performed Date	Description	Details
Wed, 09 May 2012	Admin hired Julian Hudson for Trainee Manager	View
Sun, 29 Apr 2012	Admin offred the job for Trainee Manager	View
Sun, 29 Apr 2012	Admin marked 1st interview as passed for Trainee Manager	View
Mon, 23 Apr 2012	Admin scheduled 1st interview on Thu, 10 May 2012 with Emma White for Trainee Manager	View
Mon, 23 Apr 2012	Shortlisted for Trainee Manager by Admin	View
Mon, 23 Apr 2012	Admin assigned the job vacancy Trainee Manager	
Mon, 23 Apr 2012	Admin added Julian Hudson	

Figure 17.1: Candidate’s History

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

9.2 Vacancies

Here the Admin can create a vacancy for a particular job title required by the company. To add a vacancy, go to Recruitment Module>>Vacancies and click "Add" and the screen as shown in Figure 17.2 will appear.

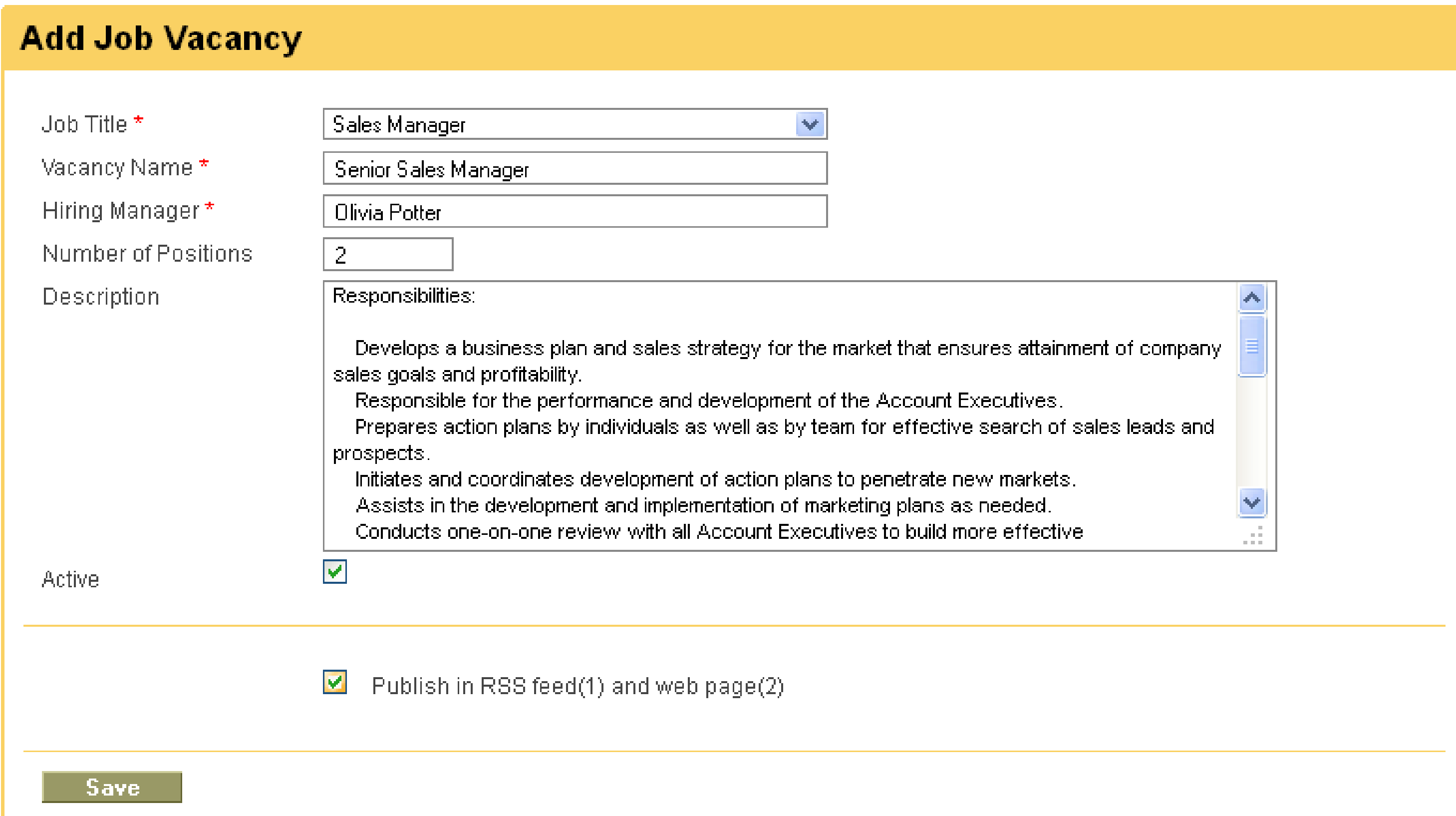


Figure 17.2: Add Job Vacancy

Enter the following fields:

Job title: the position that is needed by the company
Vacancy Name: the name in which you want the vacancy to be posted as.
Hiring Manager
Number of Positions
Description: a description of the job role
Active: to make the job vacancy active and be posted online. You may unselect "Active" if you want to post the vacancy some other time.
Publish in RSS Feed and Webpage: you may publish the vacancy of RSS feed and on the company's webpage. The following link will appear to show the pathway of the job that was posted as shown in Figure 17.3.

1 : RSS Feed URL : http://192.168.10.48/orangehrm-2.7-rc.1/symfony/web/index.php/recruitmentApply/jobs.rss

2 : Web Page URL : http://192.168.10.48/orangehrm-2.7-rc.1/symfony/web/index.php/recruitmentApply/jobs.html

Figure 17.3: RSS Feed

Click “Save “once you have defined the job vacancy and it will be listed as shown in Figure 17.4.

Add Delete

	Vacancy	Job Title	Hiring Manager	Status
☐	Customer relationship officer	Team Leader	Emma White	Active
☐	Senior Sales Manager	Sales Manager	Olivia Potter	Active
☐	Trainee Manager	Sales Manager	Emma White	Active
☐	Trainee Officer	Customer Relationship Officer	Berty Cruise Brown	Active

Figure 17.4: Job Vacancy List

Applying for a Vacancy

Both internal and external applicants can apply for a vacancy through jobs.php. When an applicant visits the company’s website or through the RSS feed they will be directed to the job vacancy portal in jobs.php where they will see all the active vacancies of the company as shown in Figure 17.5.

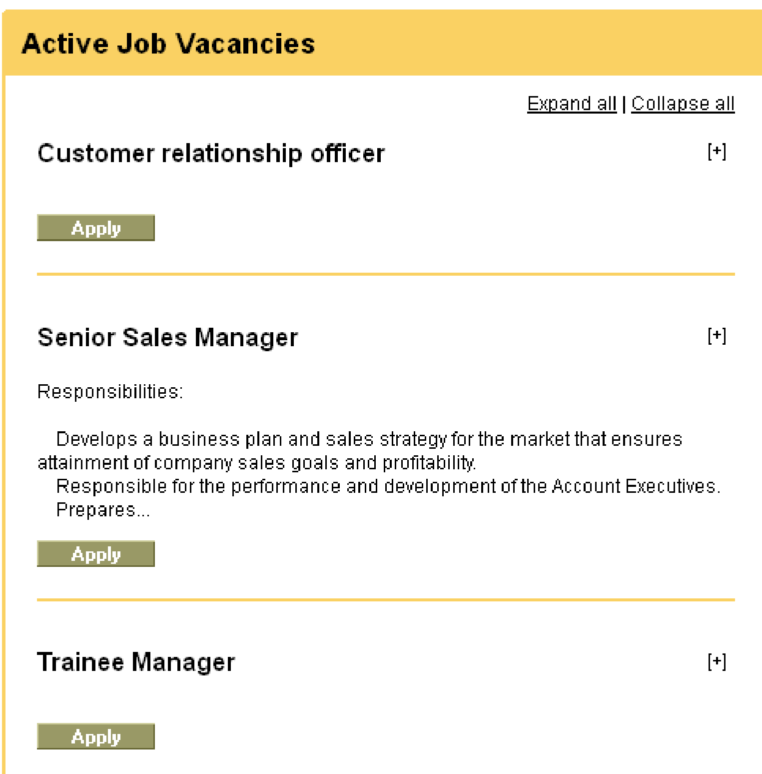


Figure 17.5: Active Job Vacancies

The applicant may click "Apply" under the particular Job title and they will be directed to the screen as shown in Figure 17.6.

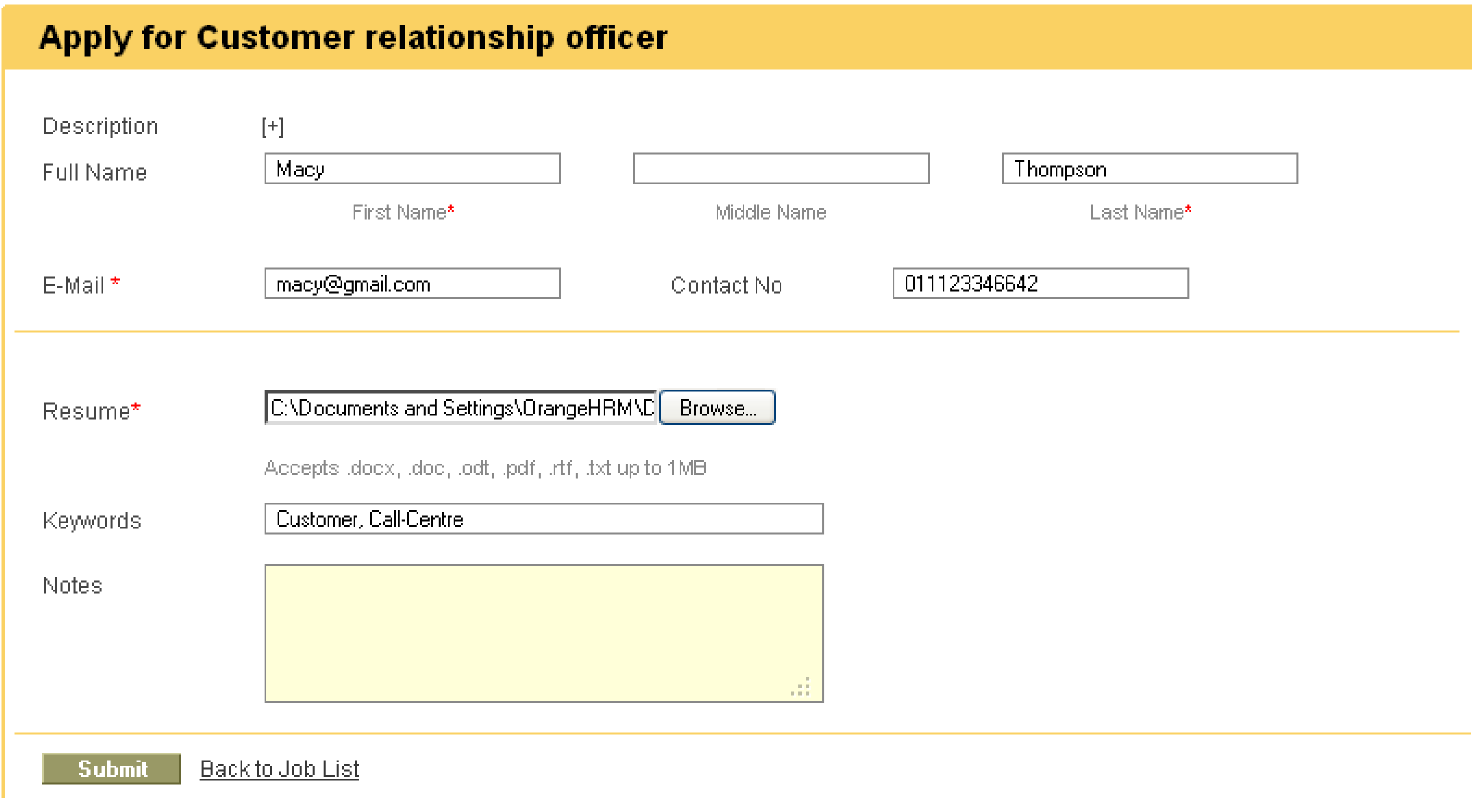
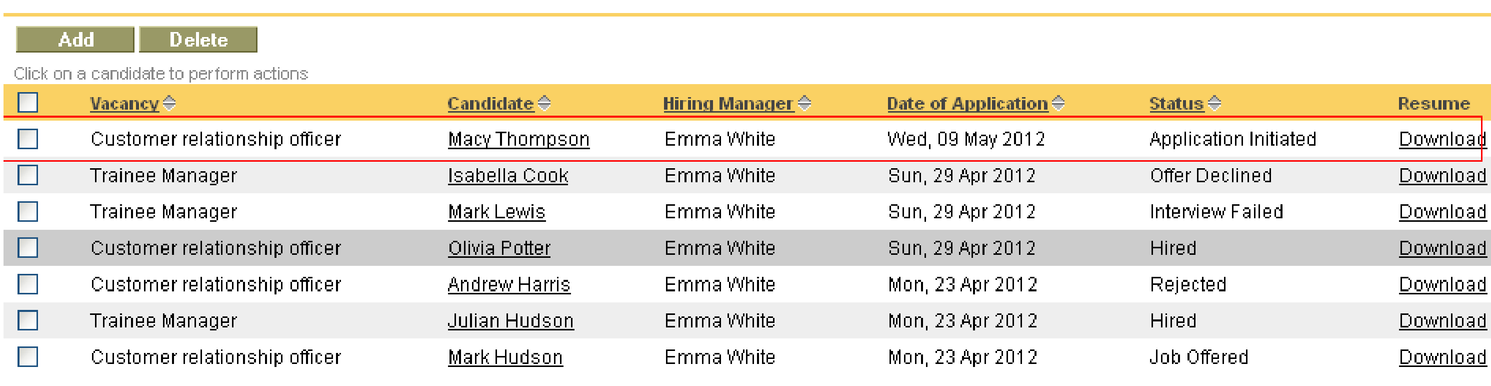


Figure 17.6: Apply for Job Vacancy

The applicant needs to enter the following fields and click "Submit" to submit the application and the candidate will appear under the candidate database (Recruitment Module>>Candidates) as shown in Figure 17.7.



Add Delete

Click on a candidate to perform actions

	Vacancy	Candidate	Hiring Manager	Date of Application	Status	Resume
☐	Customer relationship officer	Macy Thompson	Emma White	Wed, 09 May 2012	Application Initiated	Download
☐	Trainee Manager	Isabella Cook	Emma White	Sun, 29 Apr 2012	Offer Declined	Download
☐	Trainee Manager	Mark Lewis	Emma White	Sun, 29 Apr 2012	Interview Failed	Download
☐	Customer relationship officer	Olivia Potter	Emma White	Sun, 29 Apr 2012	Hired	Download
☐	Customer relationship officer	Andrew Harris	Emma White	Mon, 23 Apr 2012	Rejected	Download
☐	Trainee Manager	Julian Hudson	Emma White	Mon, 23 Apr 2012	Hired	Download
☐	Customer relationship officer	Mark Hudson	Emma White	Mon, 23 Apr 2012	Job Offered	Download

Figure 17.7: Candidate List

10.0 Performance

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

10.1 KPI List

This feature enlists all Key Performance Indicator (KPI) for all job titles. To view KPI List, go to Perfomance>>KPI List and the screen as shown in Figure 17.8 will appear.

Search Key Performance Indicators

Job Title: All

Search

Key Performance Indicators for Job Title:

Add | Delete | Copy

	Key Performance Indicator	Job Title	Min Rate	Max Rate	Is Default
☐	Call Coaching	Customer Relationship Officer	1	4	-
☐	Call Coaching	Sales Manager	1	4	-
☐	Quota Goals	Customer Relationship Officer	1	10	Yes
☐	Team Work	HR Executive	1	4	-

Figure 17.8: Key Performance Indicators

10.2 Add KPI

The HR Admin can define a KPI for a specific job title. To do so, go to Performance>> Add KPI and the screen as shown in Figure 17.9 will appear.

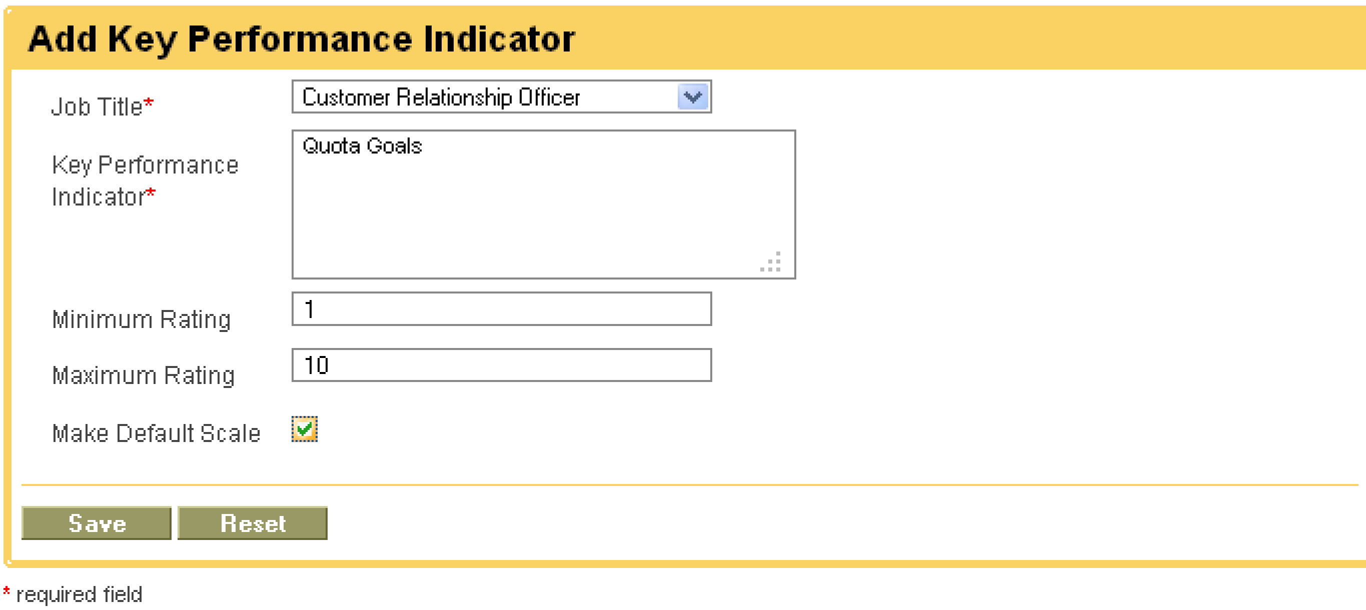


Figure 17.9: Add Kep Performance Indicator

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

Click " Save" once all the fields are entered. The following Key Performance Indicator will then be listed under KPI List. (see Figure 17.8)

10.3 Copy KPI

You may copy a KPI from one job title to another through this feature. To do so, go to Performance>> Copy KPI and the screen as shown in Figure 17.9 will appear.

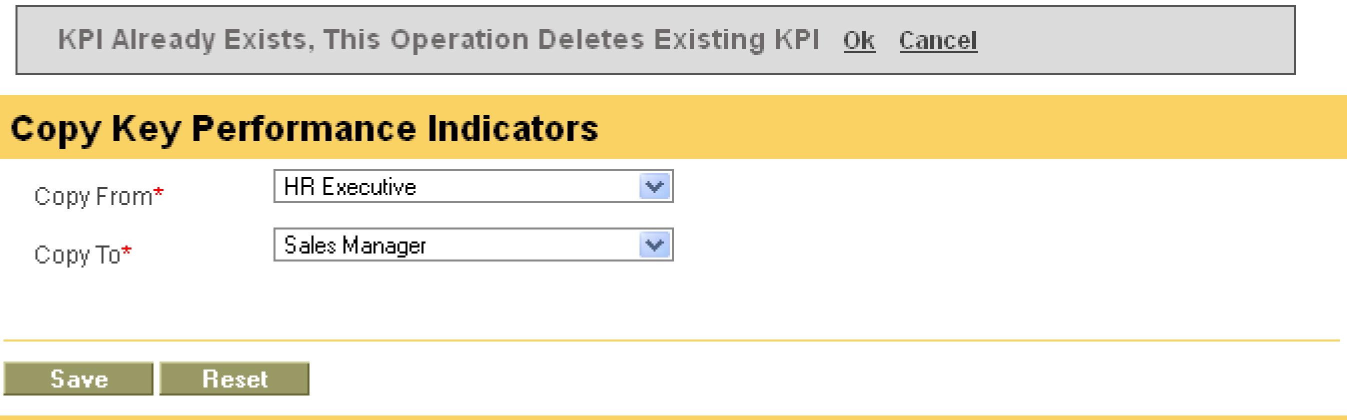


Figure 17.9: Copy Key Performance Indicators

Click "Save" once you have selected the fields.

*Note: Once you copy a KPI from one job title to another job title with an **existing** KPI, the operation will delete the respective existing KPI and replace it with the copied one. Click "OK" to replace the existing KPI.

If you want to copy a KPI from one job title to another job title **without** an existing KPI, the operation will simply just copy the KPI from one job title to another as shown in Figure 18.0.

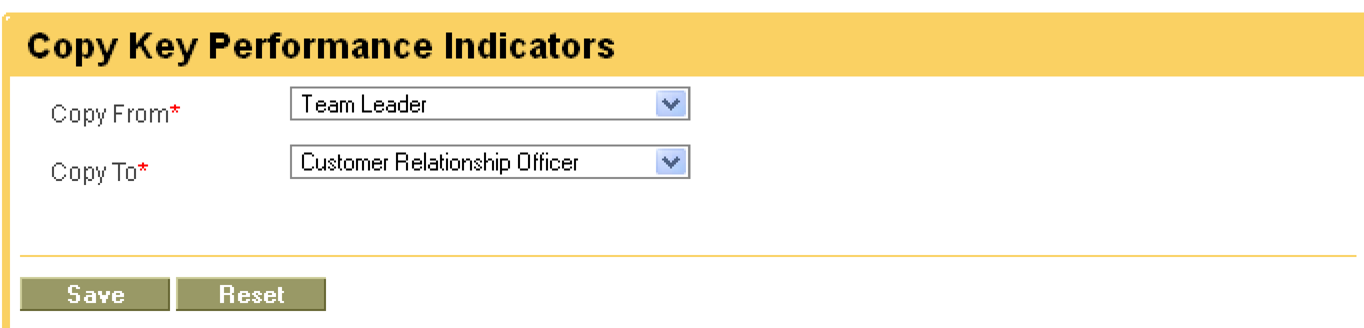


Figure 18.0: Copy Key Performance Indicators

Click "Save" once you have selected the fields and the KPI copied will be listed as shown in Figure 18.1.

Key Performance Indicators for Job Title:

Add | Delete | Copy

	Key Performance Indicator	Job Title	Min Rate	Max Rate	Is Default
	Attendance	Team Leader	1	4	-
	Attendance	Customer Relationship Officer	1	4	-
	Call Coaching	HR Executive	1	4	-
	Call Coaching	Sales Manager	1	4	-

Figure 18.1: Key Performance Indicators for Job Title

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

10.4 Add Review

This feature allows a performance review agenda for a particular employee. To enter performance review details for a particular employee, go to Performance>>Add Review and the screen as shown in Figure 18.2 will appear.

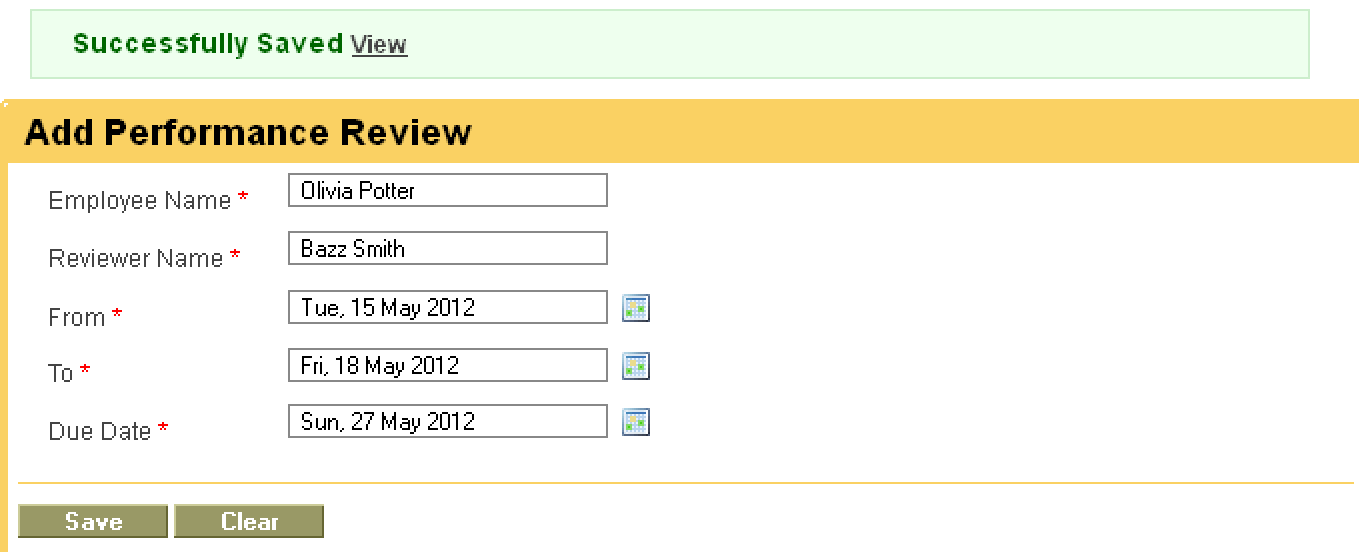


Figure 18.2: Add Performance Review

Enter the following details and click “Save”. Click on “View” on top of the screen to view the performance review details and the list of employees with the following performance review details will be listed as shown in Figure 18.3.

Figure 18.3: Performance Review List

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

10.5 Reviews

This feature allows you to review an employee's performance based on the KPIs for his/her job role. To review an employee's performance, go to Performance>>Reviews and the screen as shown in Figure 18.4 will appear.

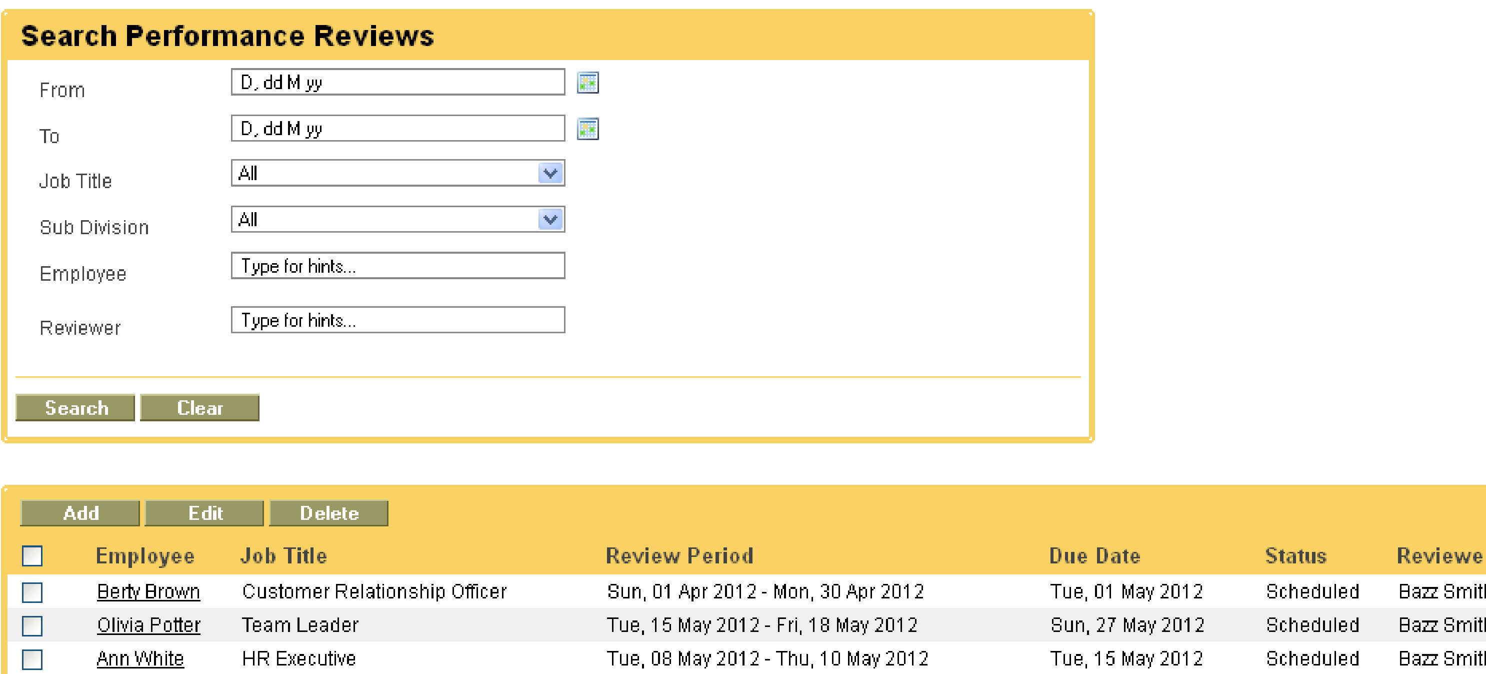


Figure 18.4: Search Performance Reviews

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

- From – To: The date period for the particular performance review
- Job Title: employees with the specified job title to be reviewed

- Subdivision: the subdivision of the employee's to be reviews
- Employee: the employee's name
- Reviewer: the reviewer's name

Simply click on the employee name to initiate the performance review and the screen as shown in Figure 18.5 will appear

Figure 18.5: Performance Review of an employee

Click "Edit" to enter details:

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

11.0 Help Module

The Help Module features help topics, professional OrangeHRM Support, Forum, Blog etc. that would give you more information on the OrangeHRM system.

Support

This link will take you to the OrangeHRM Support Plan page and at any point of time you can choose to subscribe for professional assistance with queries on the product. http://www.orangehrm.com/promotion-plans.php

Forum

The OrangeHRM Forum is a place where all the users post their questions, comments and find out more about OrangeHRM. http://www.orangehrm.com/forum/

Blog

The Blog will be updated by us with articles about OrangeHRM and information with regards to releases and other useful topics. http://www.orangehrm.com/blog/

Training

This link will take you the OrangeHRM Training page and you would be able to view the various trainings OrangeHRM conducts for our clients. http://www.orangehrm.com/training/

Add-Ons

This link will take you to the OrangeHRM Market Place where you will be able to view various add-ons features that could be integrated with your OrangeHRM system. http://www.orangehrm.com/new-addon-plans.shtml

Customization

The OrangeHRM team can address your specific requirements by developing and delivering a customized version of your OrangeHRM system. http://www.orangehrm.com/customizations.php

Bug Tracker

If you experience any error while using the system, you can select the bug tracker option and you will be directed to the link http://sourceforge.net/tracker/?group_id=156477&atid=799942 and you can report the error to OrangeHRM. Our OrangeHRM team would respond at the most earliest time possible.

12.0 Troubleshooting

During the Installation Process:

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

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

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

2. **Give a unique Database Name...**

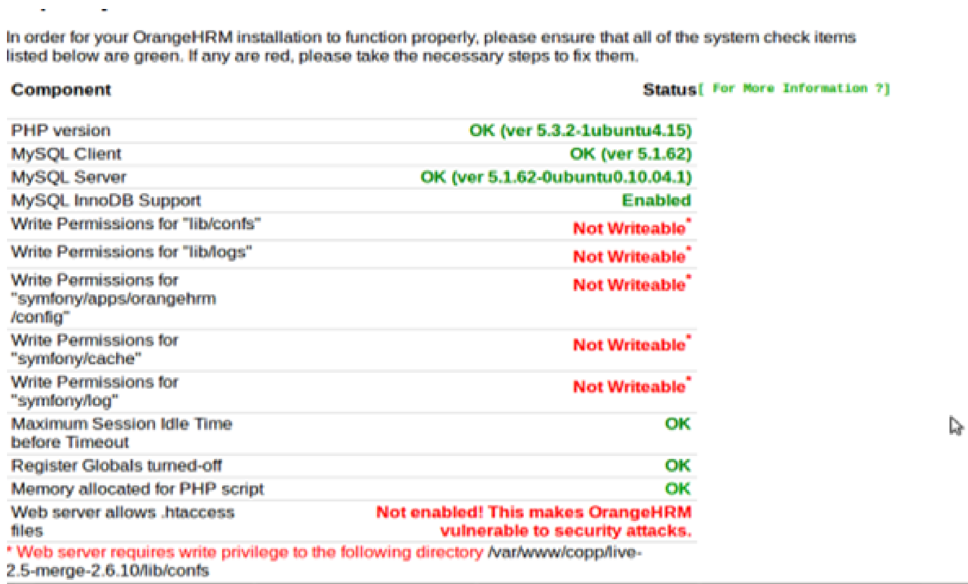
Database (end) already exists.

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

3. **Linux Users**

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

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


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

Component	Status[For More Information ?]
PHP version	OK (ver 5.3.2-1ubuntu4.15)
MySQL Client	OK (ver 5.1.62)
MySQL Server	OK (ver 5.1.62-0ubuntu0.10.04.1)
MySQL InnoDB Support	Enabled
Write Permissions for "lib/confs"	Not Writeable*
Write Permissions for "lib/logs"	Not Writeable*
Write Permissions for "symfony/apps/orangehrm/config"	Not Writeable*
Write Permissions for "symfony/cache"	Not Writeable*
Write Permissions for "symfony/log"	Not Writeable*
Maximum Session Idle Time before Timeout	OK
Register Globals turned-off	OK
Memory allocated for PHP script	OK
Web server allows .htaccess files	Not enabled! This makes OrangeHRM vulnerable to security attacks.

* Web server requires write privilege to the following directory /var/www/copp/live-2.5-merge-2.6.10/lib/confs

After Installation:

4. A Blank Page Displayed

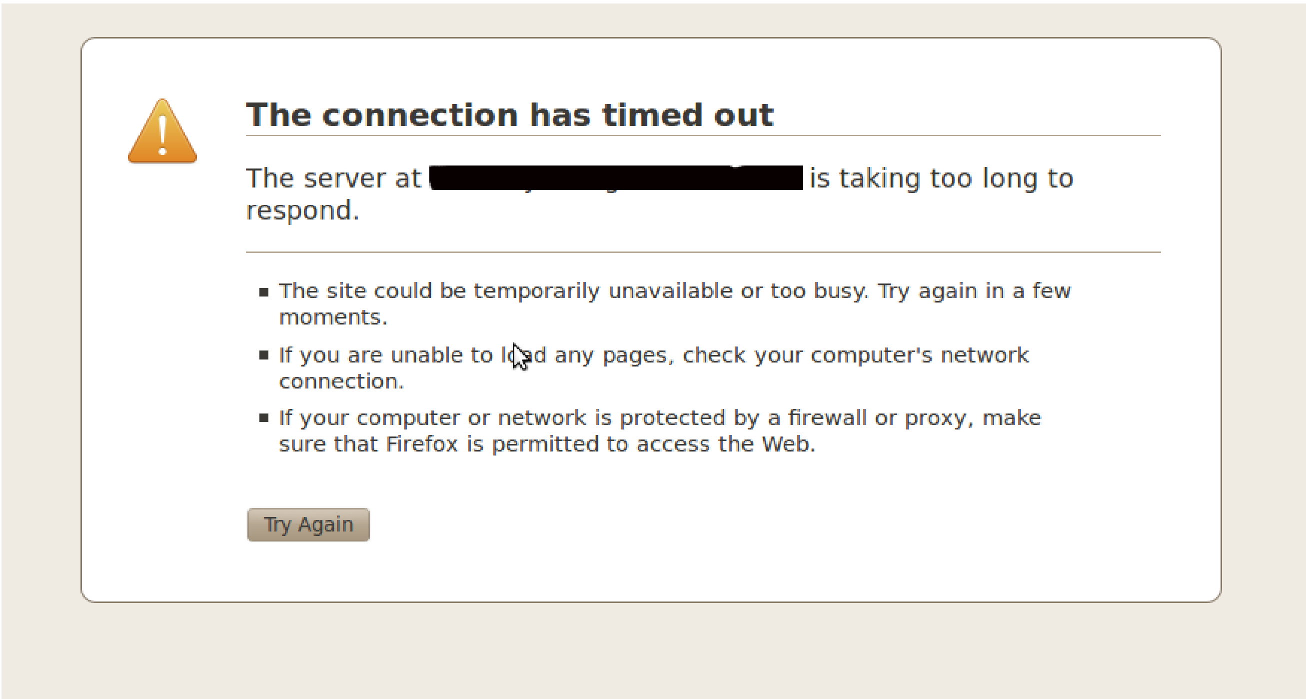
This might be due to several reasons:

- You might be using an older version of Internet Explorer.
- Javascript might be disabled in your browser.
- You might be using IIS or a different web server. We recommend Apache server, or you could install xampp/wamp package instead.
- You might have to increase the PHP and MySQL parameters. Please visit the following link to change parameter values: https://wiki.orangehrm.com/index.php/38%29_How_to_increase_PHP_and_MYSQL_performance_parameters%3F

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

While Using OrangeHRM:

5. Web Page Time Out



Increase the PHP and MySQL parameters.

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

13.0 Frequently Asked Questions

1. How to enable InnoDB support in MySQL?

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

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

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

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

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

OR

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

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

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

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

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

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

- Please check if you have installed other web server software like IIS , Sun Web Server etc.

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

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

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

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

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

6. How to increase PHP and MYSQL performance parameters?

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

7. Unable to click on buttons in the OrangeHRM application

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

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

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