ESS-Supervisor User Guide

Contents

1.0 Audience

This document is intended as a complete guide for ESS-Supervisor in 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 The System

Log-in to the OrangeHRM System using the ESS-User account that has been created by the Admin as shown in Figure 2.0.

Figure 1.0: Log in Panel

3.0 My Info Module

The My Info Module is a powerful tool providing employees of the company with the ability to view relevant information such as personal information, updating personal information with web - enabled PC without having to hassle the HR staff.

The functionality of this module spans through the entire system, making information available anywhere, anytime. All information is subject to company's defined security policy, where he/she can only view the information he/she is authorized to. An ESS-User can only edit certain fields in the ESS Module.

3.1 Personal Details

An ESS-Supervisor which is also an employee will have access to the ESS Module. Upon logging into the system for the first time, the first thing you will see is the "Personal Details" screen as shown in Figure 1.2. They are able to edit and enter certain fields.

The following are restricted fields where an ESS-Supervisor just like any employee cannot make changes to the following under his personal details:

Personal Details

- Employee ID
- SSN No
- SIN No
- Driver License No
- Date of Birth

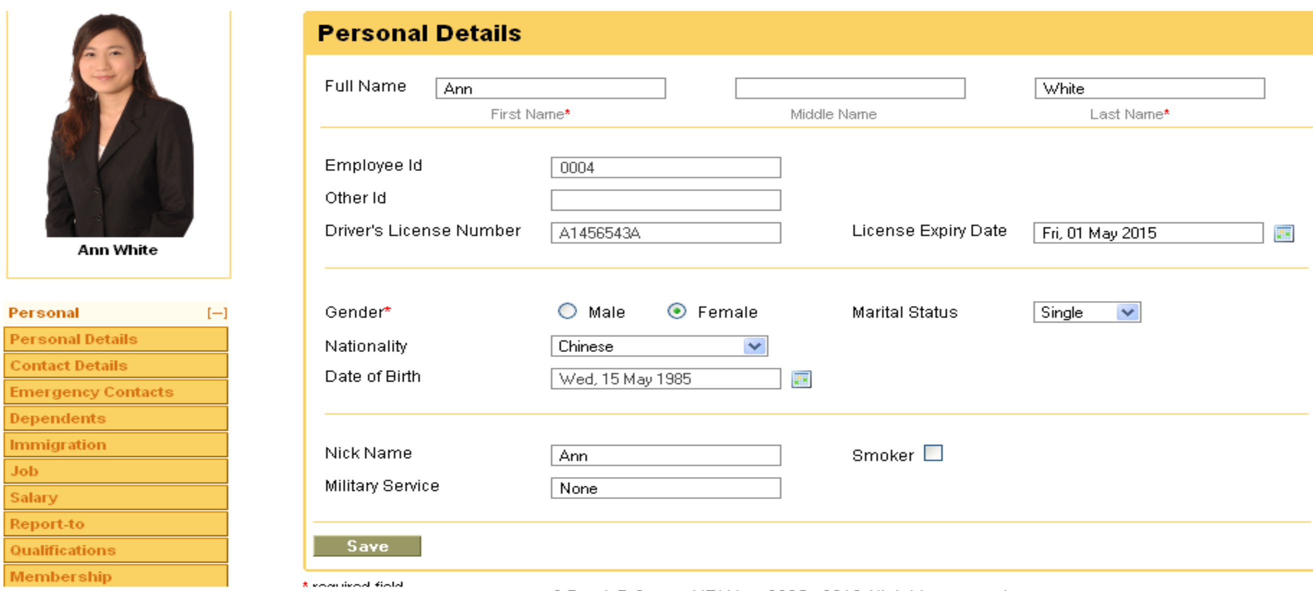


Figure 1.2: Personal Details

3.2 Photograph

The ESS-Supervisor can add a photograph of himself/herself by clicking on the photograph at corner of the screen and the screen as shown in Figure 1.3 will appear.

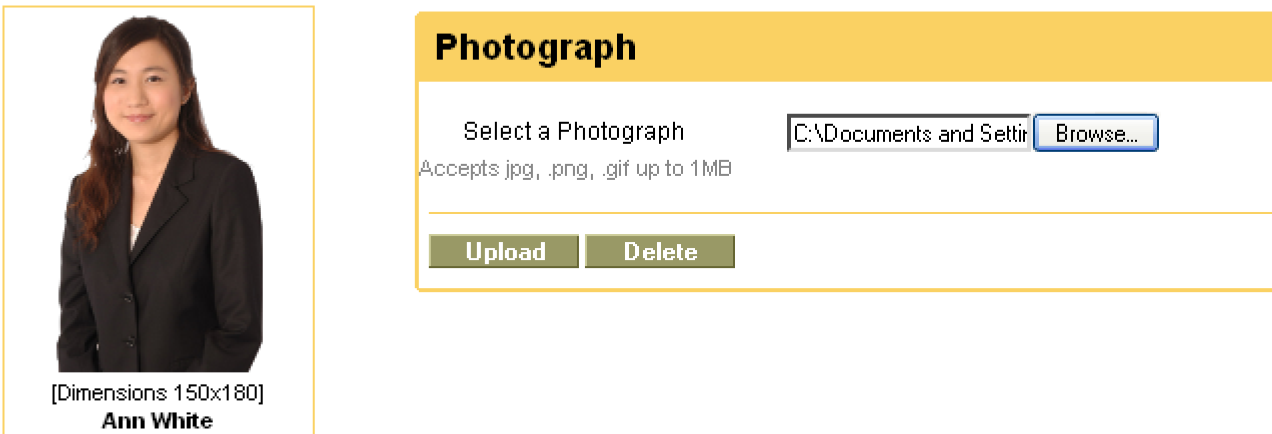


Figure 1.3: Photograph

Click “Browse” and the select a photograph from the relevant path. Click “Upload” once you have selected the picture .The picture selected will be populated on the photograph section.

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

3.3 Contact Details

Contact information can be entered from here. Click on “Contact Details” under the “Personal” column and the screen as shown in Figure 1.4 will appear.

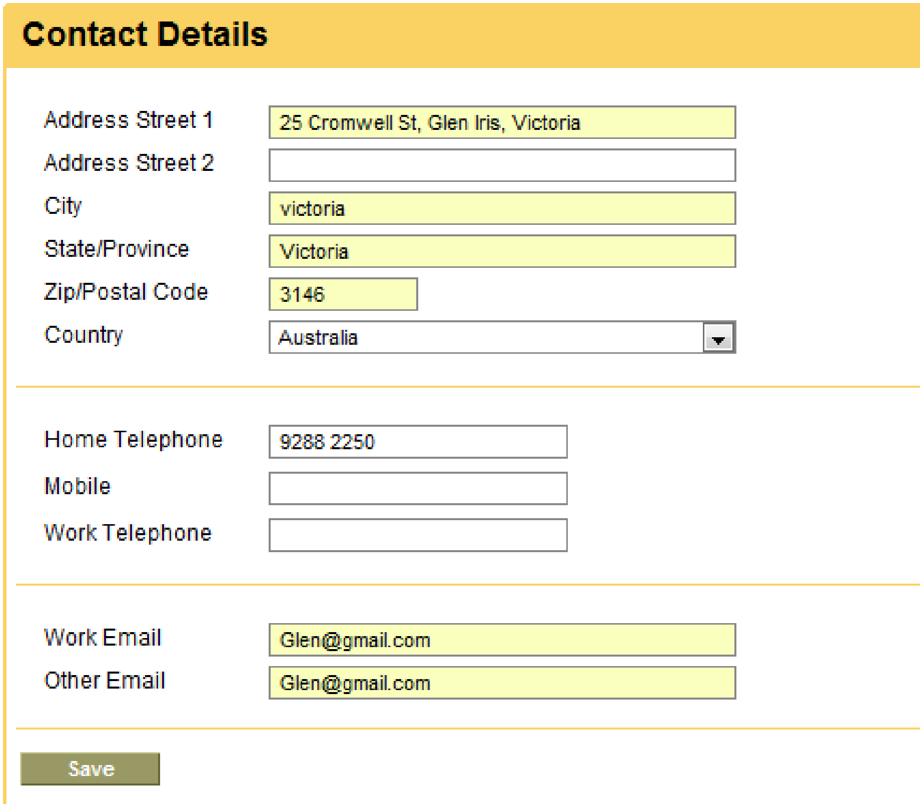


Figure 1.4: Contact Details

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

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

Once you have completed this form click “Save”.

3.4 Emergency Contact

Contact details which will be needed during an emergency can be entered here. Select “Emergency Contacts” on the “Personal” column and the screen as shown in Figure 1.5 will appear.

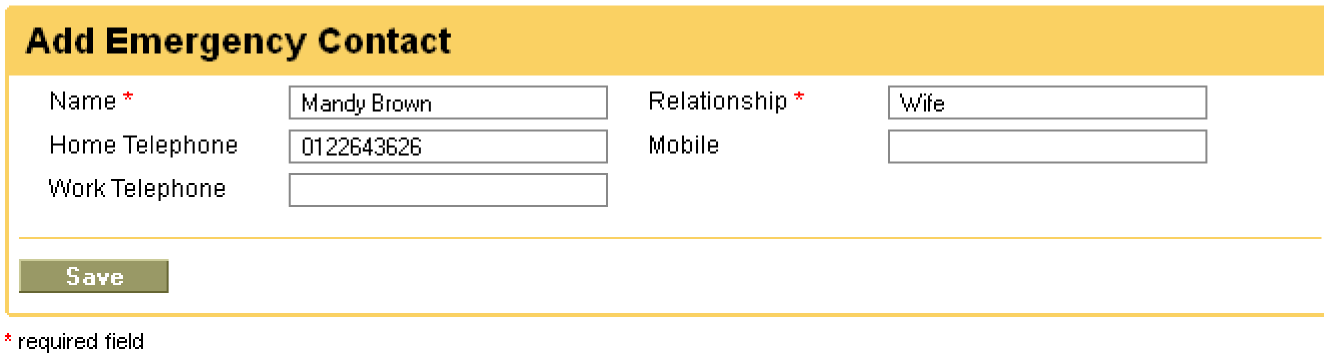


Figure 1.5: Add Emergency Contact

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

Click “Save” once the fields are added the emergency contact will be listed as shown in Figure 1.6

Figure 1.6: 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 uploading the following file by clicking “Upload”.

3.5 Dependents

If you have any dependents you can enter them here. To add a dependent, click on “Dependents” under the “Personal” column and the screen as shown in Figure 1.7 will appear.

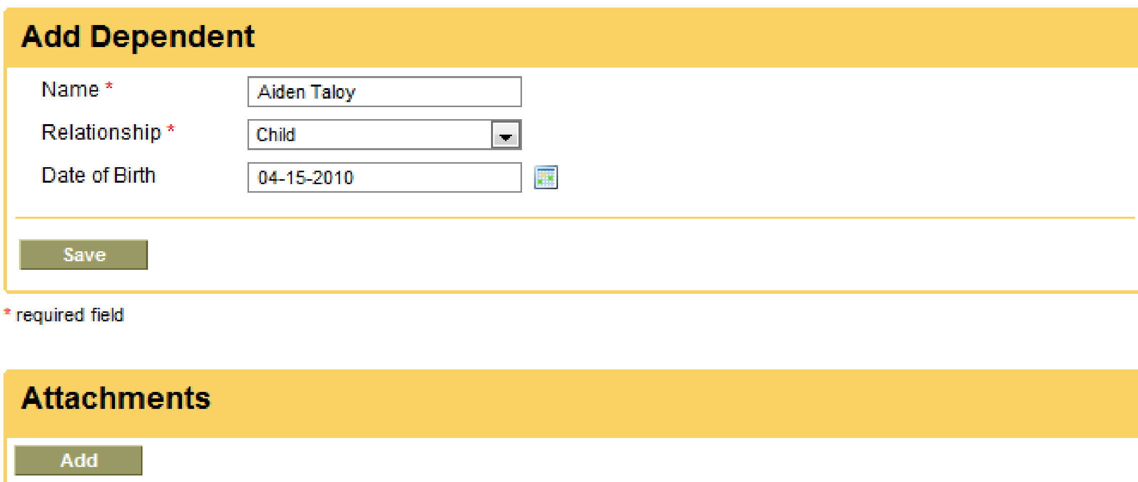


Figure 1.7: Add Dependents

Enter the “Name” of your dependent, the “Relationship” of the dependant to you and his/her “Date of Birth”.. Click “Save” once you have entered the following fields and your dependent will be listed as shown in Figure 1.8.

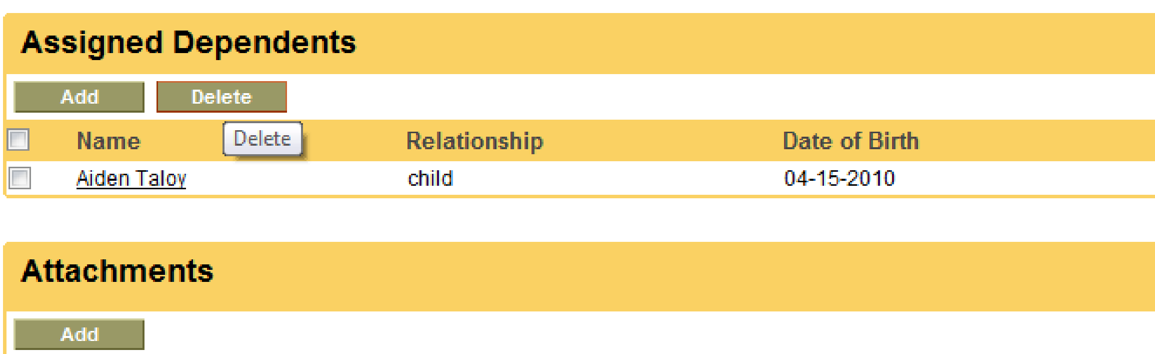


Figure 1.8: Assigned Dependents

You may add multiple entries of dependents.

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 click “Delete”.

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

3.6 Immigration

Your immigration information can be entered here. To add your immigration information, select “Immigration” under the “Personal “column and the screen as shown in Figure 1.9 will appear.

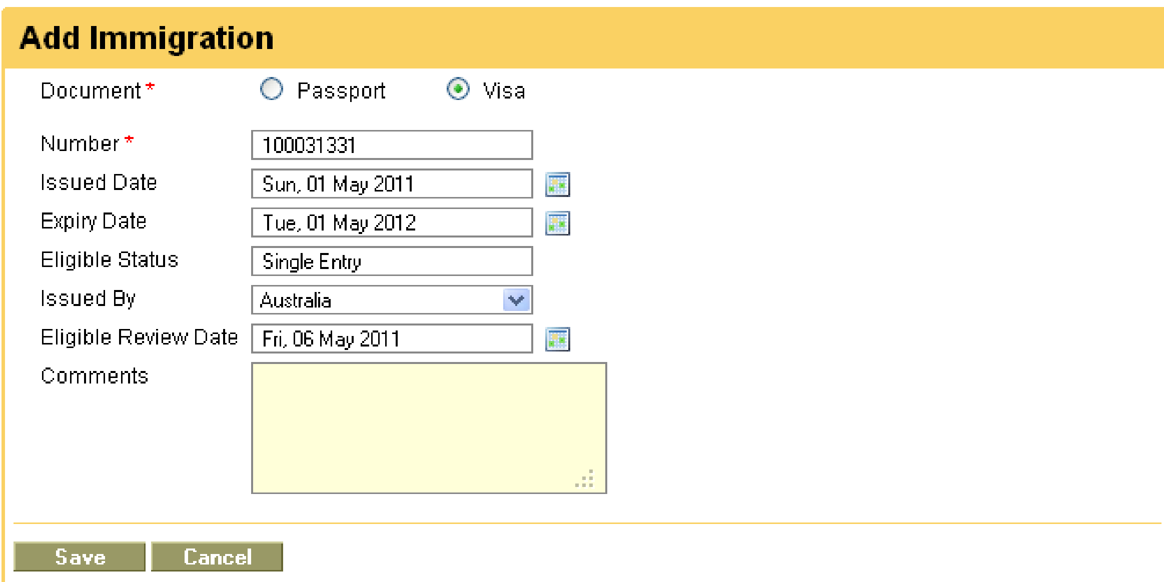


Figure 1.9: Add Immigration

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

Click “Save” once the fields are added and the following immigration documents will be listed as shown in Figure 2.0.

Assigned Immigration Documents

Add | Delete

☐ Document	Document No	Issued By	Issued Date	Date of Expiry
☐ Passport	005528808	Australia	Thu, 19 Jul 2012	Thu, 09 Apr 2015
☐ Visa	100031331	Australia	Sun, 01 May 2011	Tue, 01 May 2012

Attachments

Add

Figure 2.0: Assigned Immigration Documents

You may add multiple entries of immigration documents.

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

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

3.7 Job

You are only able to view your job details that have been pre-defined by the Admin as shown in Figure 3.9. You are restricted from editing the following fields:

- **Job**

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

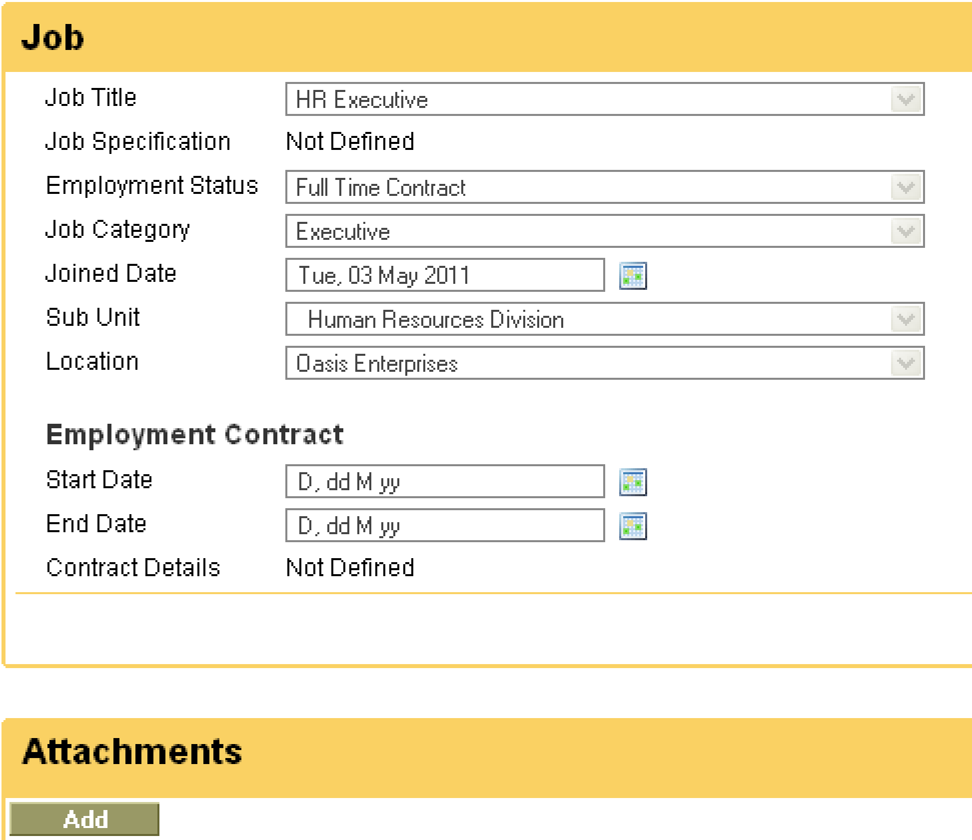


Figure 2.1: Job Details

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

3.8 Salary

The salary information field is completely hidden from the ESS-Supervisor as shown in Figure 3.10. Only the HR Admin has access to this information and has to be manually communicated to the ESS-Supervisor. You are restricted from editing the following fields:

- **Salary**

- Pay Grade
- Salary Component
- Pay Frequency
- Currency

- Amount
- Comments
- Add Direct Deposit Details
    - Account Number
    - Account Type
    - Routing Number
    - Amount

Figure 2.2: Salary Details

You may upload any attachment that would support the your salary information by clicking “Add” under the “Attachment” and selecting a file from a relevant path and uploading the following file by clicking “Upload”.

3.9 Report To

This feature allows the employees to know whom they report to and is of importance when applying for leave, who can approve/reject leave requests, who can approve/reject submitted timesheet, etc.

As an ESS-Supervisor, you are only able to view the list of your respective supervisors that you report to(if you have any) and the list of your subordinates as shown in Figure 2.3. You are restricted from editing the following fields:

Report To

- Assigned Supervisors
- Assigned Subordinates

There are two default types of reporting method:

- **Direct** : functional relationship between employee and supervisor
- **Indirect** : administrative relationship between employee and supervisor

Figure 2.3: Assigned Supervisors/Subordinate Details

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

3.10 Qualifications

- ***Work Experience***

Your previous work experiences can be entered here. To enter previous work experiences, go to **My Info>>Personal>> Qualification** and click "Add" under "Work Experience" and the screen as shown in Figure 2.4 will appear.

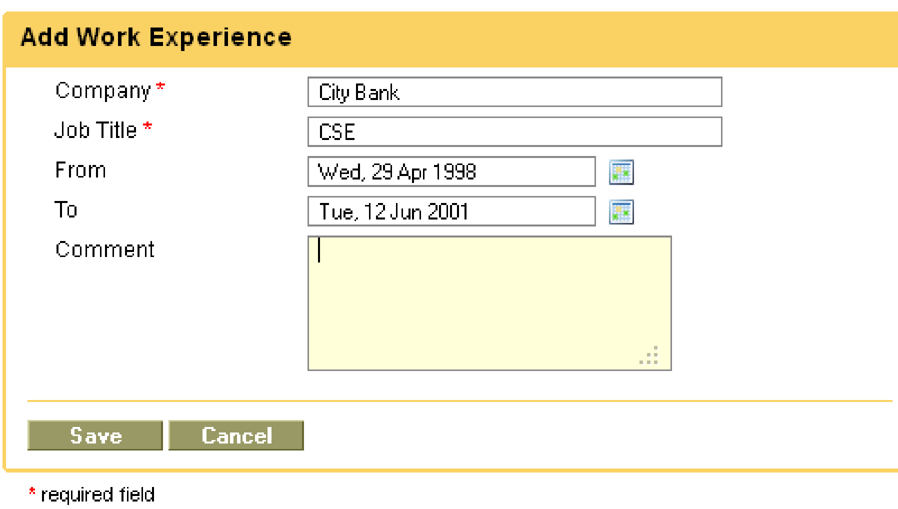


Figure 2.4: Add Work Experience

Click "Save" once all the fields are entered and the particular work experience will be listed as shown in Figure 2.5.

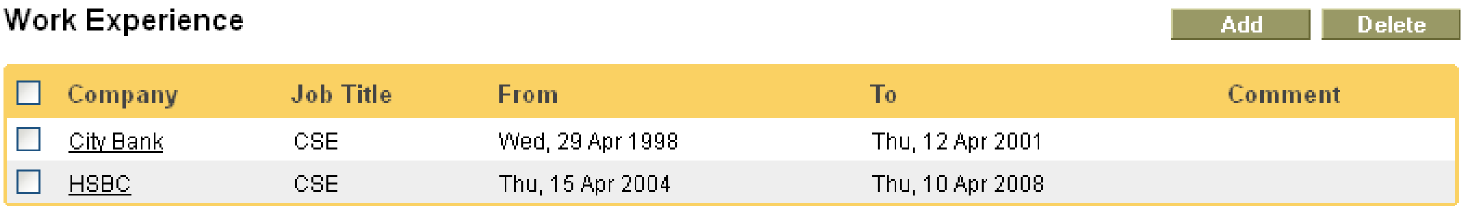


Figure 2.5: Work Experience List

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***

You are able to enter details of your education here. To enter education details, go to **My Info>>Personal>> Qualification** and click "Add" under "Education" and the screen as shown in Figure 2.6 will appear.

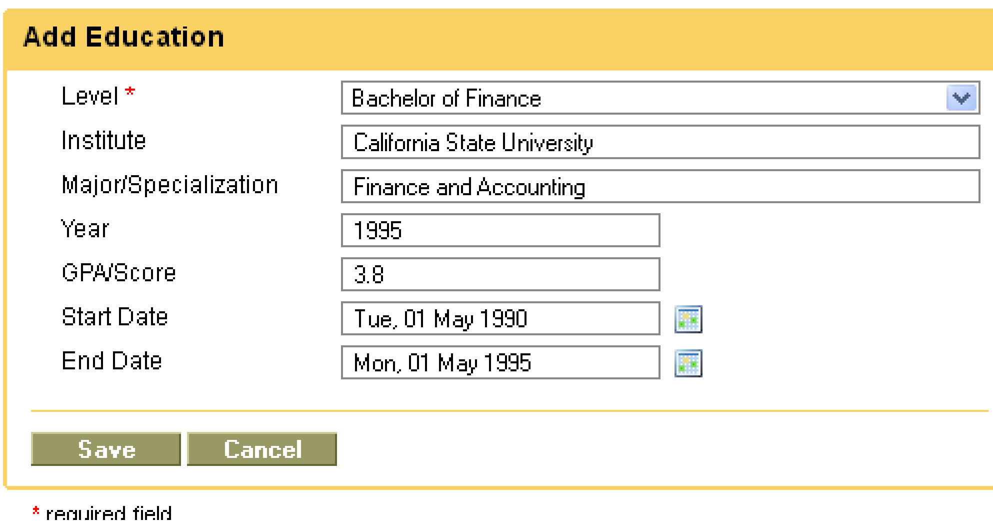


Figure 2.6: Add Education

Click "Save" once all the fields are entered and the particular education details will be listed as shown in Figure 2.7.

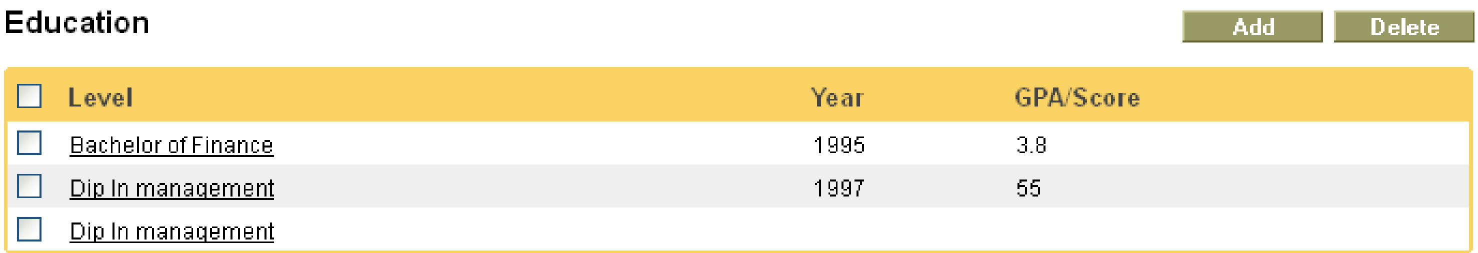


Figure 2.7: List of Education Background

You may enter multiple entries of education.

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

- ***Skills***

If you have any special talents or skills those can be entered here. To enter skills go to **My Info>>Personal>> Qualification** and click “Add” under “Skills” and the screen as shown in Figure 2.8 will appear.

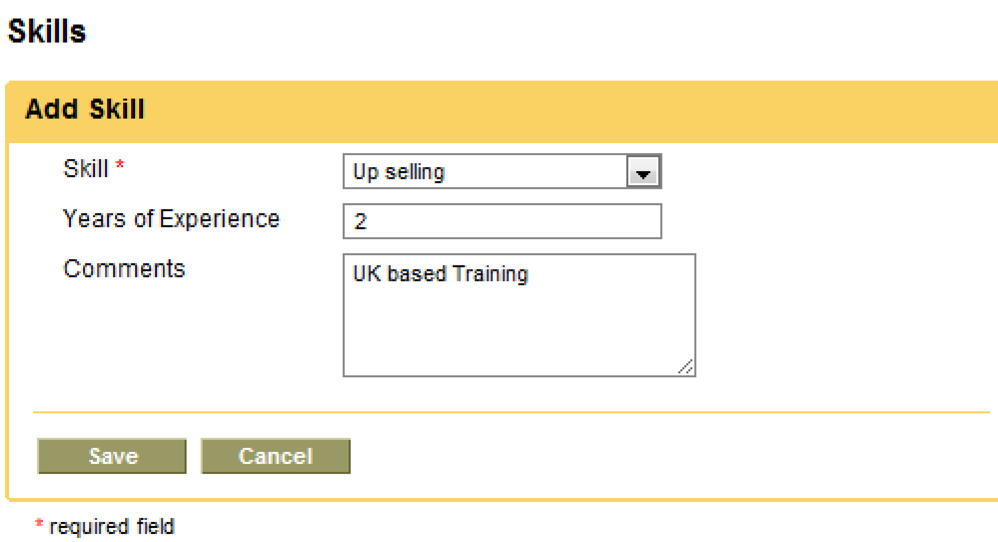


Figure 2.8: Add Skill

Click “Save” once all the fields are entered and the particular skill will be listed as shown in Figure 2.9.

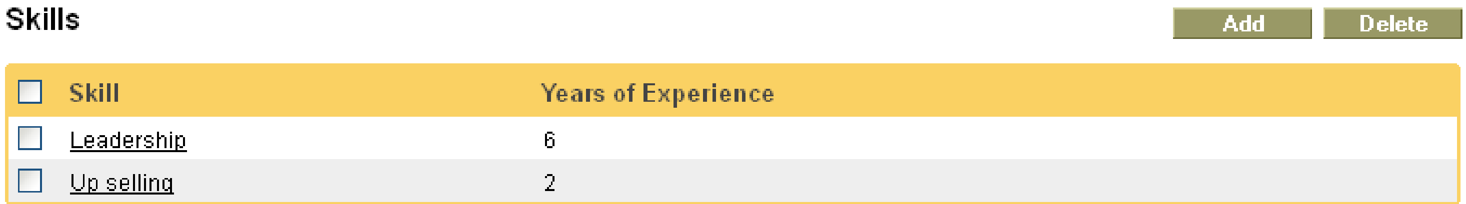


Figure 2.9: List of Skills

You may enter multiple entries of skills.

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

- ***Languages***

You can enter the various languages that you are competent in, with the level of competency. To enter your language of competency, go to **My Info>>Personal>> Qualification** and click "Add" under "Language" and the screen as shown in Figure 3.0 will appear.

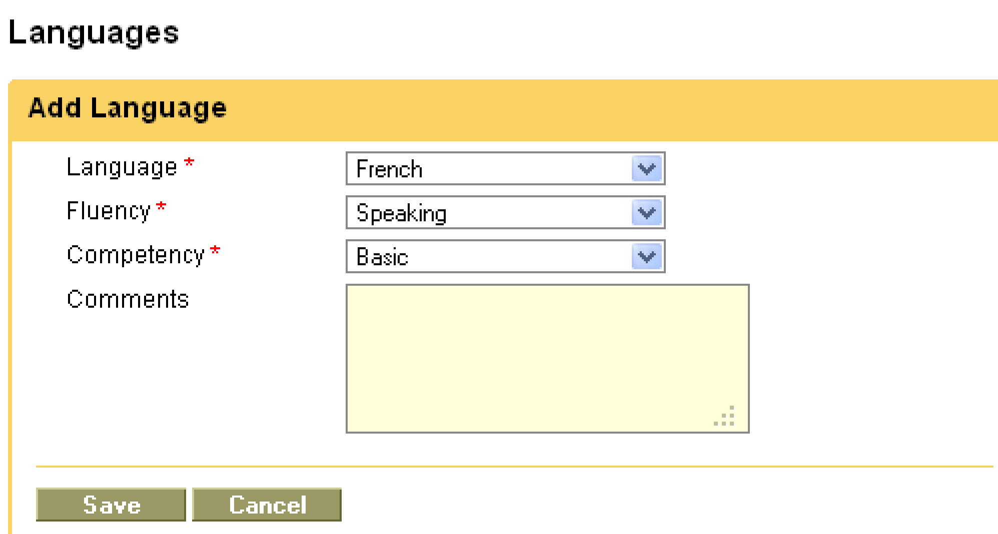


Figure 3.0: Add Language

Click "Save" once all the fields are entered and the particular language of competency will be listed as shown in Figure 3.1.

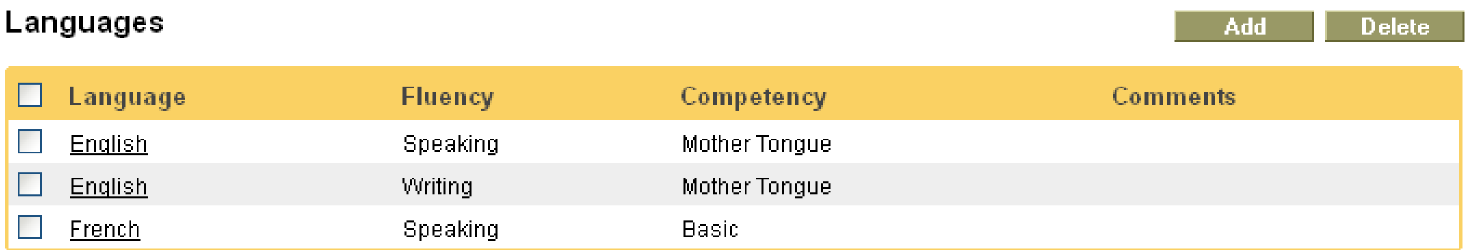


Figure 3.1: List of Languages of Competency

You may enter multiple entries of languages.

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

- ***License***

Here you can enter the licenses that you may have. To enter licenses, go to **My Info>>Personal>> Qualifications** and click "Add" under "License" and the screen as shown in Figure 3.2 will appear.

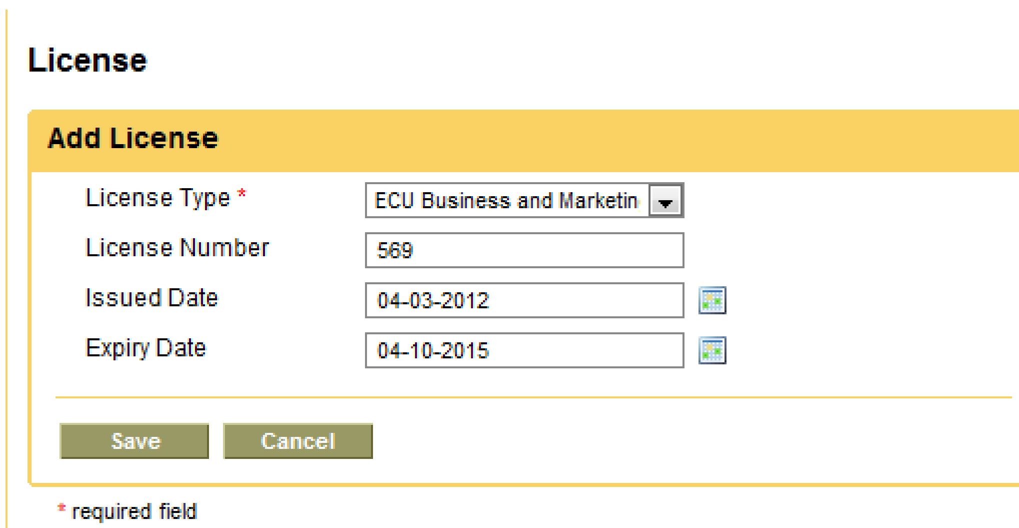


Figure 3.2: Add License

Click "Save" once all the fields are entered and the particular license details will be listed as shown in Figure 3.3.

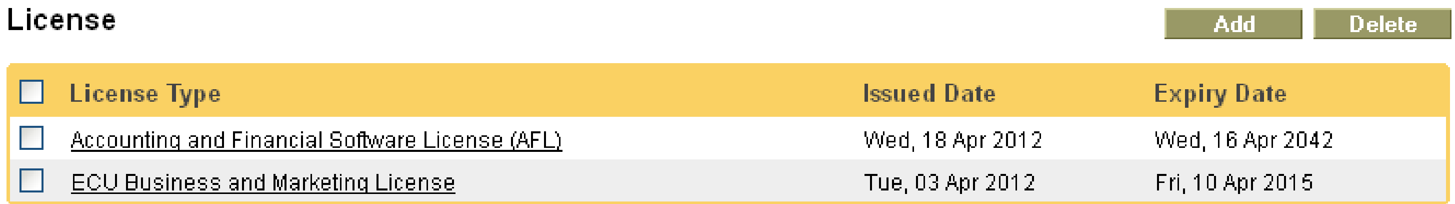


Figure 3.3: List of Licenses

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

- ***Attachments***

Any supporting documents regarding your qualification that you think is needed by the management can be attached here. Please note that each document cannot exceed 1 megabyte, but you can attach more than one document. Click "Add" under attachment and the screen as shown in Figure 3.4 will appear.

Click "Browse" select the file and click Upload" to upload it.

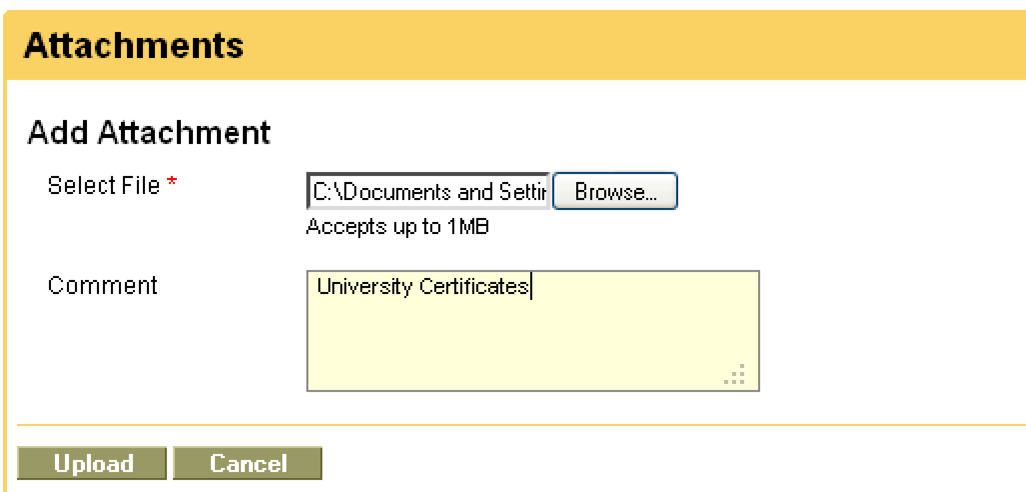
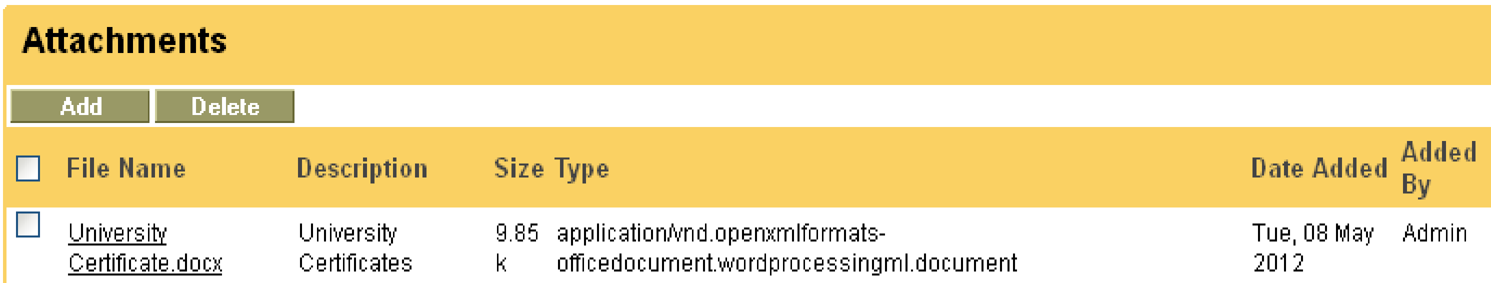


Figure 3.4: Add Attachment

Once you have uploaded the file, the file will be listed as shown in Figure 3.5.



Attachments

Add | Delete

☐	File Name	Description	Size	Type	Date Added	Added By
☐	University Certificate.docx	University Certificates	9.85 k	application/vnd.openxmlformats-officedocument.wordprocessingml.document	Tue, 08 May 2012	Admin

Figure 3.5: List of Attachments

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

3.11 Membership

If you are a members of any committee, institute etc. those details can be entered here. To enter membership details, go to **My Info>>Personal>>Membership** and click "Add" and the screen as shown in Figure 3.6 will appear.

Figure 3.6: Add Membership Details

Click "Save" once all the fields are entered and the particular membership details will be listed as shown in Figure 3.7.

Assigned Memberships

Add Delete

☐	Membership	Subscription Paid By	Subscription Amount	Currency	Subscription Commence Date	Subs
☐	Membership in ACCA	Company	10000.00	AUD	Tue, 01 May 2012	Wed,
☐	Membership in CIMA	Company	15000.00	AUD	Thu, 03 Apr 2014	Wed,

Attachments

Add Delete

☐	File Name	Description	Size	Type	Date /
☐	OLIVIA POTTER.docx		13.34 k	application/vnd.openxmlformats-officedocument.wordprocessingml.document	Fri, 27

Figure 3.7: 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 uploading the following file by clicking “Upload”.

3.12 Leave Summary

Your personal leave summary details as well as your subordinates’ leave summary details can be viewed here. To view leave summary go to **My Info>>Leave>>Leave Summary**, the screen as shown in Figure 3.8 will appear.

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 3.8: Leave Summary

By default you will see your personal leave summary details. To view your subordinate's leave summary, delete your name on the search toolbar field and click "Search" as shown in Figure 3.9.

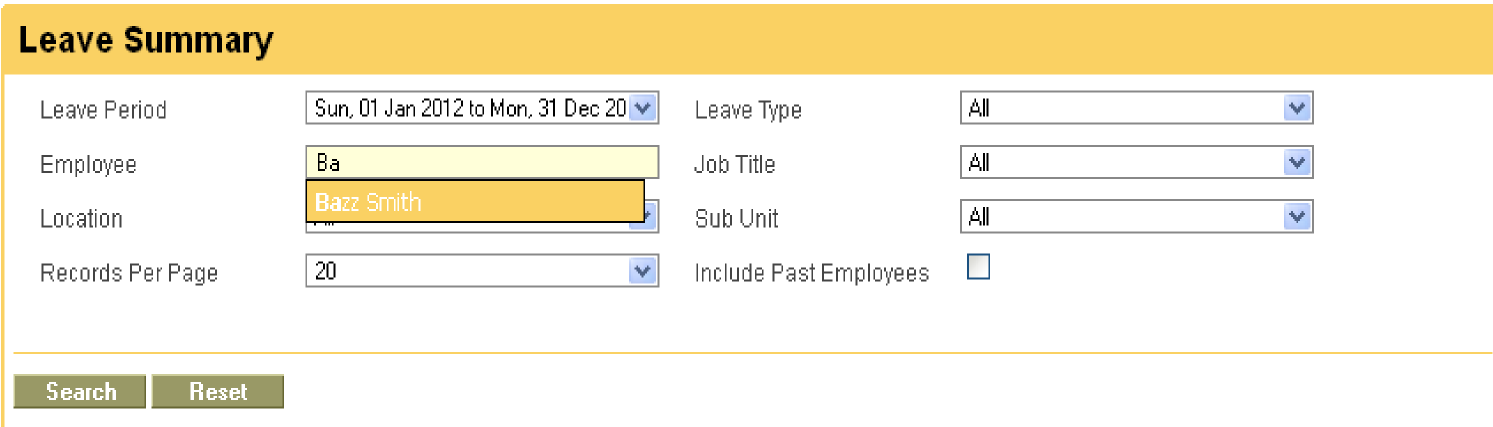


Figure 3.9: Leave Summary Search Engine

A list of your subordinates name will appear with their corresponding leave summary details as shown in Figure 4.0.

You may also use the search toolbar to run and view specific leave summary details of your subordinates and apply the following criteria:

- **Leave Period**: the leave period that is defined by the HR Admin that will be used in applying/assigning for leave
- **Leave Type**: search for employee who is entitled for the particular leave type.
- **Employee**: the name of the specific employee
- **Job Title:** search for employee and his/her leave summary with the specific job title
- **Location**: search for employee and his/her leave summary located in a particular company location.
- **Sub-Unit**:search for employee and his/her leave summary under a particular sub-unit.
- **Records per Page**: the number of records you want displayed per page.
- **Include Past Employee**: you may click on this check box if you want to include your past employees in the search.

You may select any combinations of the following fields and click "Search". You may also click "Reset" to reset the entered fields and start the search again.

Employee Name	Leave Type	Leave Entitled (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days
Berty Cruise Brown	Annual Leave	6.00	0.00	0.00	6.00
Berty Cruise Brown	Casual Leave	11.00	0.00	6.00	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
Olivia Potter	Annual Leave	200.00	0.00	0.00	200.00
Olivia Potter	Casual Leave	7.00	1.00	1.00	5.00
Olivia Potter	Lieu Leave	2.00	0.00	0.00	2.00
Olivia Potter	Maternity Leave	30.00	0.00	0.00	30.00
Olivia Potter	Medical Leave	10.00	0.00	0.75	9.25
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

Figure 4.0: List of Employees with their Leave Summary Details

The names of your subordinates appear as a link and by clicking on the name you will be able to access their PIM records.

3.13 Leave List

This feature shows all your leave requests. You are able to view your leave requests. You may only “Cancel” your pending/scheduled leave requests and cannot make changes on any other leave status. To cancel leave request, select “Cancel” from the “Action “drop down selection as shown in Figure 4.1.

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 Action Select Action Cancel
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	

Figure 4.1: Leave List

By clicking on your “Name” you will be directed to your PIM records.

To perform an action, click on the “Action” drop down and select “Cancel”. Click “Save” to confirm action.

You can also view complete details of your leave by clicking on the “Date” or “Status” of your leave request and the screen as shown in Figure 4.2 will appear.

My Leave Details

Date	Leave Type	Leave Balance (Days)	Duration (Hours)	Status	Comments	Actions
Wed, 12 Sep 2012	Lieu Leave	0.00	8.00	Scheduled		Select Actio Select Actio Cancel
Thu, 13 Sep 2012	Lieu Leave	0.00	8.00	Scheduled		

Save Back

Figure 4.2: “My Leave” details

You may perform an action on your individual leave request on per day basis by selecting from the “Action” drop down menu. Select “Cancel” to cancel the leave request and click “Save”.

4.0 PIM Module

The ESS-Supervisor is able to view the list of all his/her subordinates and all the relevant employee related information, including different types of personal information, detailed qualifications and work experience, etc in this module.

To view employee list, go to **PIM>>Employee List** and the screen as shown in Figure 4.3 will appear.

Figure 4.3: Employee Information

You will be able to view at a glance the basic information of all your subordinates such as their First Name, Last Name, Job Title, Employment Status, Subunit and their respective supervisors.

You can view/edit details of your subordinate by clicking on their “Name” or their “ID”.

The ESS-Supervisor will only be able to edit and enter certain fields in his/her subordinates “Personal Information”.

The following are restricted fields where an ESS-Supervisor cannot make changes to the following details of his/her subordinates PIM.

- Salary
- Report-to

5.0 Leave Module

The leave module is a comprehensive leave management system where an ESS-Supervisor can apply for leave via the system as well as view/monitor his/her sub-ordinate's leave requests. When the subordinate applies for leave, an email will be sent to notify the supervisor, whom then can approve/reject the leave.

The ESS- Supervisor is also able to view his/her current leave entitlement, leave balance and notification of leave approval from their supervisors (if they too report to another supervisor).

The ESS-Supervisor will be able to view the following on the Leave Module which will further be explained in details:

- Leave Summary
- Leave List
- Assign Leave
- My Leave
- Apply

5.1 Leave Summary

This feature allows you to view your leave summary including your leave entitlements for all leave types. You are also able to view your subordinate's leave summary details on this screen as well .To view, go to **Leave>> Leave Summary** and a screen as shown in Figure 4.4 will appear.

Employee Name	Leave Type	Leave Entitled (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days
Berty Cruise Brown	Annual Leave	6.00	0.00	0.00	6.00
Berty Cruise Brown	Casual Leave	11.00	0.00	6.00	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
Olivia Potter	Annual Leave	0.00	0.00	0.00	0.00
Olivia Potter	Casual Leave	0.00	0.00	0.00	0.00
Olivia Potter	Lieu Leave	0.00	0.00	0.00	0.00
Olivia Potter	Maternity Leave	0.00	0.00	0.00	0.00
Olivia Potter	Medical Leave	0.00	0.00	0.00	0.00
Ann White	Annual Leave	0.00	0.00	0.00	0.00
Ann White	Casual Leave	0.00	0.00	0.00	0.00
Ann White	Lieu Leave	0.00	0.00	0.00	0.00
Ann White	Maternity Leave	0.00	0.00	0.00	0.00

Figure 4.4: Leave Summary

The names of your subordinates appears as a link and by clicking on the name you will be able to access their PIM records.

You may also run and view specific leave summary details of your subordinates depending on the following options provided in the search toolbar:

- **Leave Period**: the leave period that is defined by the HR Admin that will be used in applying/assigning for leave
- **Leave Type**: search for employees and their leave summary with the following leave types (annual, medical etc.)
- **Employee**: the name of employee you want to view the leave summary of.
- **Job Title**: search for employees and their leave summary with specific job titles
- **Location**: search for employees and their leave summary that are located in different company locations.
- **Sub-Unit**: search for employees and their leave summary under specific sub-units.
- **Records per Page**: the number of records you want displayed per page.
- **Include Past Employee**: if you want to include your past employees who report to you.

You may select any combinations of the following fields and click "Search" as shown in Figure 4.5. You may also click "Reset" to reset the entered fields and start the search again.

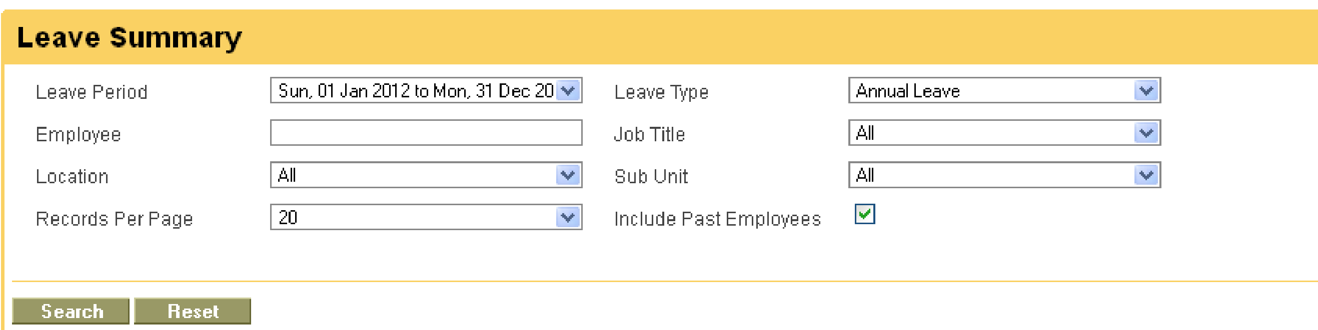


Figure 4.5: Leave Summary Search

5.2 Leave List

This feature shows the entire leave request of your subordinates. When your subordinate applies for leave you will receive a mail with a link to the leave list. Upon clicking on that link you can approve, reject or cancel the leave request. To view leave list on the system, go to **Leave Module>> Leave List** and the screen as shown in Figure 4.6 will appear.

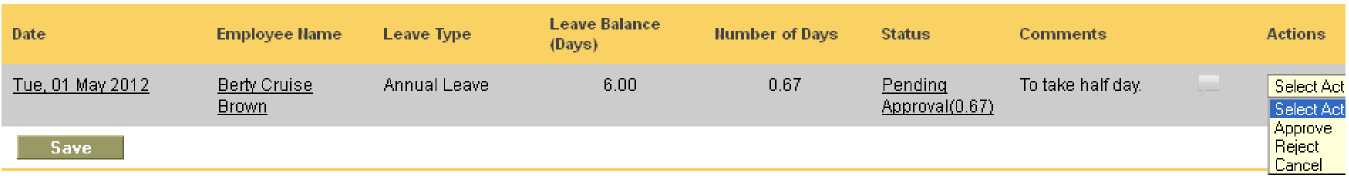


Figure 4.6: Leave List

The names of your subordinates appear as a link and by clicking on the name you will be able to access their PIM records.

Select the action to be taken on the leave request by selecting from the “Action” drop down menu to “Approve”/”Reject”/”Cancel”.

Note: You may only perform an action on a pending approval leave or a scheduled leave, you cannot take action on any other leave status.

Click “Save” once an action has been selected and the following leave request will no longer appear on the leave list screen. A mail will be then sent to the subordinate and he can view the status of his leave application.

- ***Leave Request Details***

To view detailed information of your subordinate’s leave request click on the “Date or “Status” to perform an action individually as shown in Figure 4.7. Select the necessary action to the leave request and click “Save”.

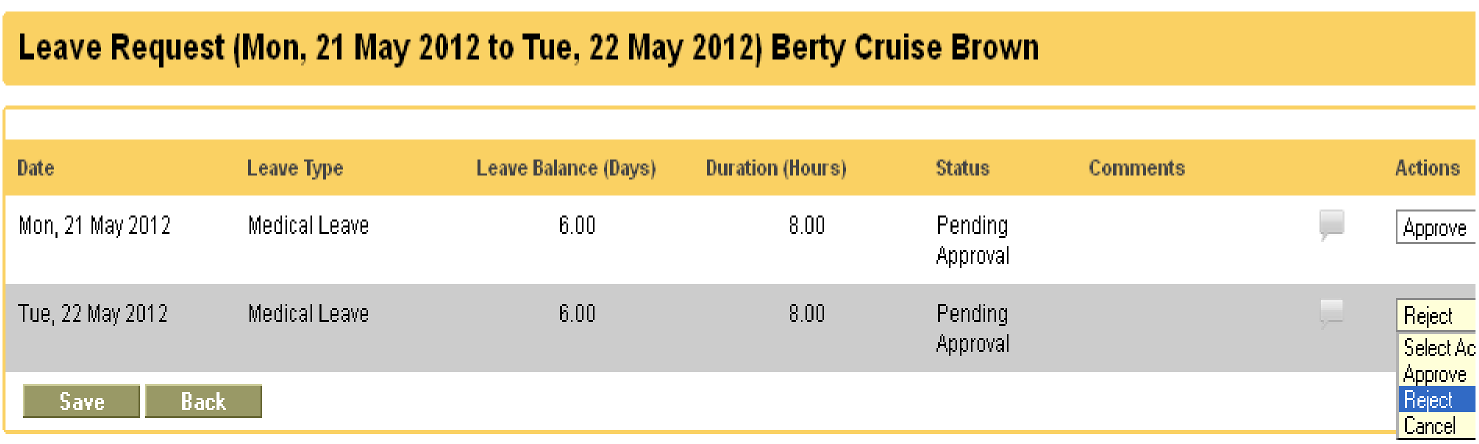


Figure 4.7: Subordinate’s Leave Request Details

Note: You may only perform an action on a pending approval leave or a scheduled leave; you cannot take action on any other leave status.

5.3 Assign Leave

This feature allows the ESS-Supervisor to assign leave for all his subordinates. To assign leave, go to **Leave>> Assign Leave** and the screen as shown in Figure 4.8 will appear.

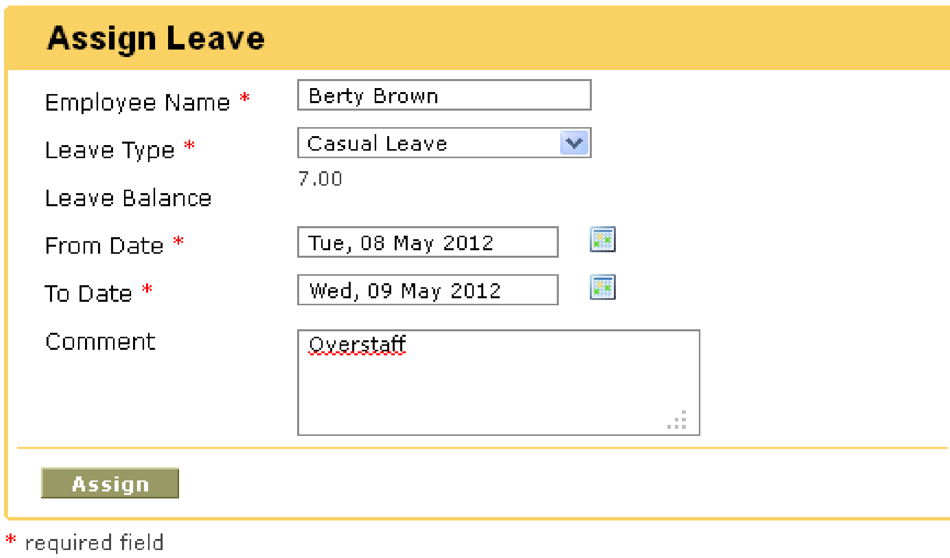


Figure 4.8: Assign Leave

Select the name of the "Employee Name" 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, 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.

5.4 My Leave

Your personal leave request details can be viewed here. To view your leave requests details, go to **Leave>> My Leave** and the screen as shown in Figure 4.9 will appear.

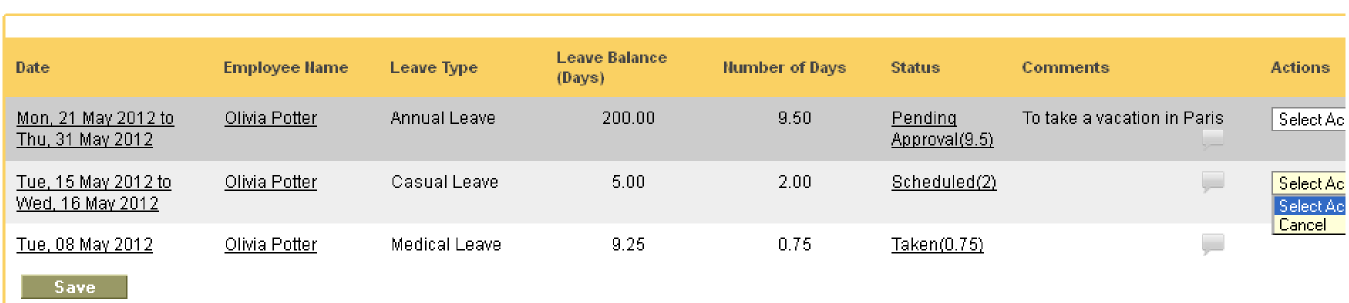
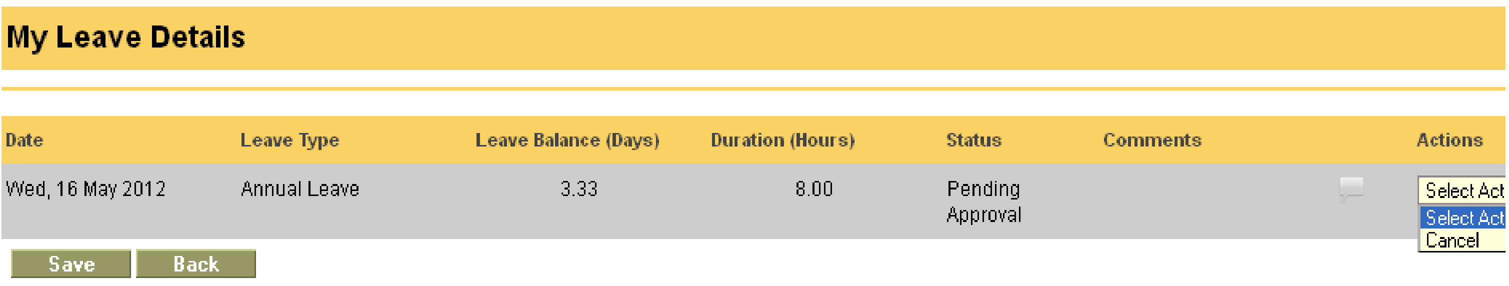


Figure 4.9: My Leave List

You can choose to cancel a pending approval leave or a scheduled leave however you cannot make any changes on any other leave status.

By clicking on your "Name" you will be directed to your PIM record.

To perform an action, click on the "Action" drop down and select "Cancel". Click "Save" to confirm action.
You can view complete details of your leave by clicking on the "Date" or "Status" of your leave request and the screen as shown in Figure 6.6 will appear.



My Leave Details

Date	Leave Type	Leave Balance (Days)	Duration (Hours)	Status	Comments	Actions
Wed, 16 May 2012	Annual Leave	3.33	8.00	Pending Approval		Select Act / Select Act / Cancel

Save Back

Figure 5.0: My Leave Details

You may perform an action on individual leave request on per day basis by selecting from the "Action" drop down menu. Select "Cancel" to cancel the leave request and click "Save".

5.5 Apply

You are able to apply for a specific leave type through this feature depending on your leave entitlement. To apply for a specific leave type, go to **Leave>>Apply** and the screen shown as shown in Figure 5.1 will appear.

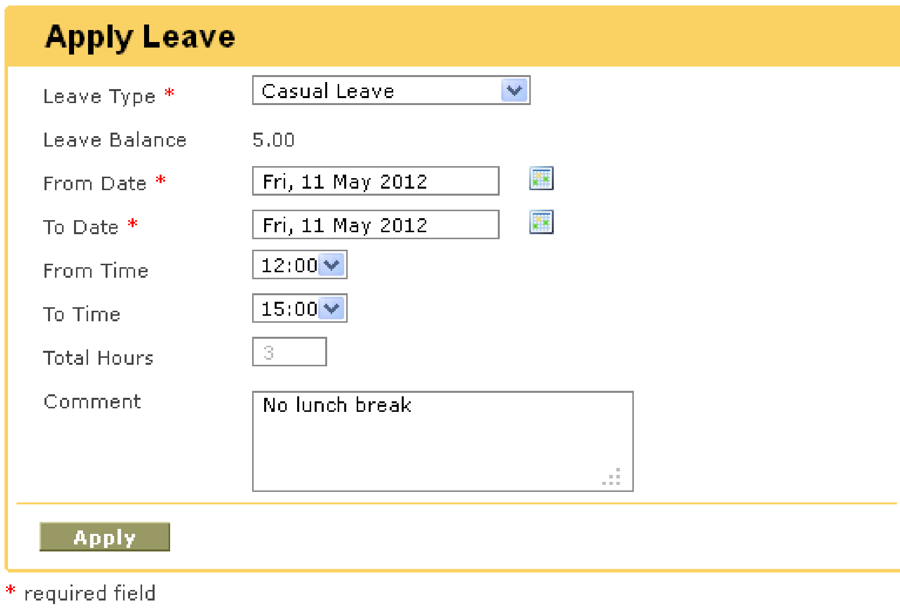


Figure 5.1: Apply for Leave

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

***Note:** If you are applying for leave for less than 24 hours, the “From Time” and “To Time” option would appear prompting you to enter the times in which you would be on leave.

Once you have filled in the details click “Apply” and a mail will be sent your respective supervisor (if you have one) and/or the Admin for approval. The status of your leave application can be seen in “My Leave” as shown in Figure 6.8.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
Mon, 21 May 2012 to Thu, 31 May 2012	Olivia Potter	Annual Leave	200.00	9.50	Pending Approval(9.5)	To take a vacation in Paris	Select Act
Tue, 15 May 2012 to Wed, 16 May 2012	Olivia Potter	Casual Leave	5.00	2.00	Scheduled(2)		Select Act
Fri, 11 May 2012	Olivia Potter	Casual Leave	5.00	0.38	Pending Approval(0.38)	No lunch break	Select Act
Tue, 08 May 2012	Olivia Potter	Medical Leave	9.25	0.75	Taken(0.75)		

Save

Figure 5.2: My Leave Request

6.0 Time Module

This module automates time tracking related processes of an ESS-Supervisor and his/her subordinates. The functionality of this module is to allow the ESS-Supervisor to enter and submit their timesheet and enter their punch in/punch out time as well as view and approve/reject his/her subordinate's submitted timesheets. The ESS-Supervisor can also track his/her employees' attendance records and enter/submit their attendance records

The ESS-User will be able to view the following on the Time Module which will further be explained in details:

- **Timesheet**
  - My Timesheet
  - Employee Timesheet
- **Attendance**
  - My Records
  - Punch in/out
  - Employee Records
- **Reports**
  - Employee Reports
  - Attendance Summary

6.1 Timesheet

This feature allows the ESS-Supervisor to enter his timesheet for a particular project that he was assigned to as well as view and approve/reject his/her subordinates timesheet.

- ***My Timesheet***

You will be able to enter and submit your timesheet for a particular project that you were assigned to. To enter a timesheet, go to **Time>> Timesheet>> My Timesheet** and the screen as shown in Figure 5.3 will appear.

Figure 5.3: 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 5.4.

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

Once you have determined the week period for the timesheet, you can now enter the timesheet details by clicking “Edit” and the screen as shown in Figure 5.4 will appear.

Figure 5.4: Edit Timesheet

The following options are available when editing the timesheet:

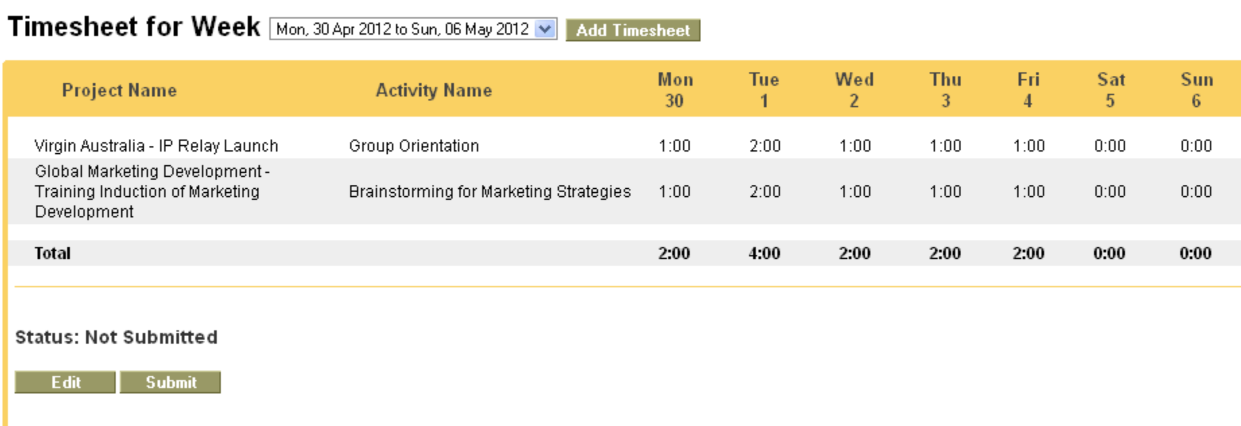
- **Cancel**: allows the user to cancel any changes made in the timesheet.
- **Save**: allows the user to save any changes made in the timesheet.
- **Add Row**: allows the user to enter another row to enter details of project activities and the corresponding times spent.
- **Remove Rows**: allows the user to delete a row by clicking on the selected check box and clicking “Remove Row”.

- **Reset**: allows the user to reset the details entered and enter new timesheet details.

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

Click on the check box beside the project name before you click “Save” to save the particular records and the screen as shown in Figure 5.5 will appear.

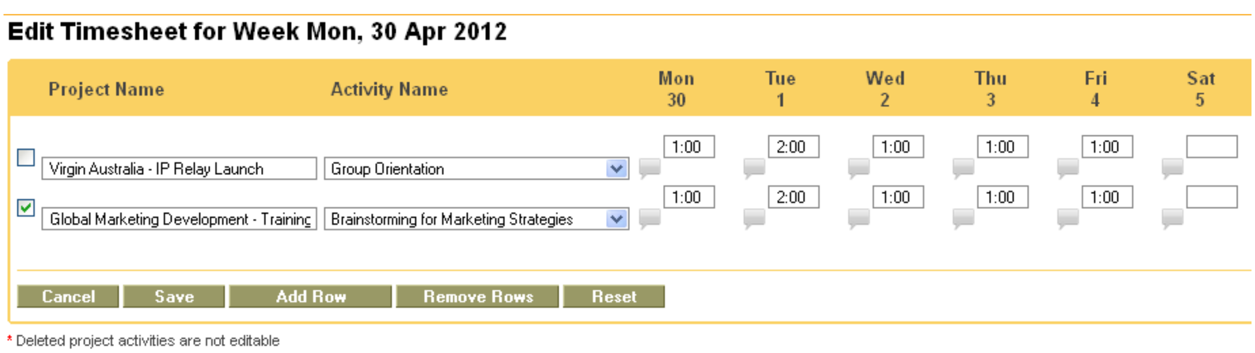
*Note: You need to be assigned to a project by the administrator to enter your details in your timesheet.



Project Name	Activity Name	Mon 30	Tue 1	Wed 2	Thu 3	Fri 4	Sat 5	Sun 6
Virgin Australia - IP Relay Launch	Group Orientation	1:00	2:00	1:00	1:00	1:00	0:00	0:00
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
Total		**2:00**	**4:00**	**2:00**	**2:00**	**2:00**	**0:00**	**0:00**

Figure 5.5: Save Timesheet

You may also remove a particular record after the timesheet has been saved by clicking “Edit” and the screen as shown in Figure 5.6 will appear. Click on the check box for the particular row you want removed and click “Remove Rows” and the record will no longer appear on the timesheet record.



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

Figure 5.6: Remove Rows

Once the necessary changes have been made, click “Submit” to submit the completed timesheet and you will see the status change from “Not Submitted” to “Submitted” as shown in Figure 5.7.


Timesheet 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

Actions Performed on the Timesheet

Action	Performed By	Date	Comment
Submitted	Ann White	Wed, 02 May 2012	

Figure 5.7: Submit Timesheet

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

Once the timesheet has been submitted it will be sent to the HR Admin (if the HR Admin has subscribed to the following notification type) and your supervisors (if you have one).

- ***Employee Timesheets***

The ESS-Supervisor can view his/her subordinate’s submitted timesheet in which the ESS-Supervisor can either approve/reject the timesheet. You can also enter and submit your employee’s timesheet. To view employee’s submitted timesheet, go to Time>> Timesheet>>Employee Timesheet and the screen as shown in Figure 5.8 will appear.

Figure 5.8: ESS Supervisor View Employee’s Submitted Timesheet

You 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 5.9 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 5.9: ESS-Supervisor View/Edit/Approve/Reject Timesheet

You can approve or reject a timesheet and also enter a comment. You 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" when the employee-subordinate logs into the system and checks his/her timesheet status. The action performed by the supervisor will then be listed under "Actions Performed on the Timesheet" as shown in Figure 6.0.

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 6.0: Actions Performed on the Timesheet by ESS-Supervisor

6.2 Attendance

All attendance records of the ESS-Supervisor and his/her subordinates are maintained and recorded under “Attendance” menu.
You are able to do the following task under this feature.

- Punch In/Out
- View personal attendance records
- View employee’s attendance records

- ***Punch In/Punch Out***

This feature allows capturing the number of hours that you have spent while working for the company. To access the Punch In/Out tab, go to **Time>> Attendance>>Punch In/Out** and the screen as shown in Figure 6.1 will appear.

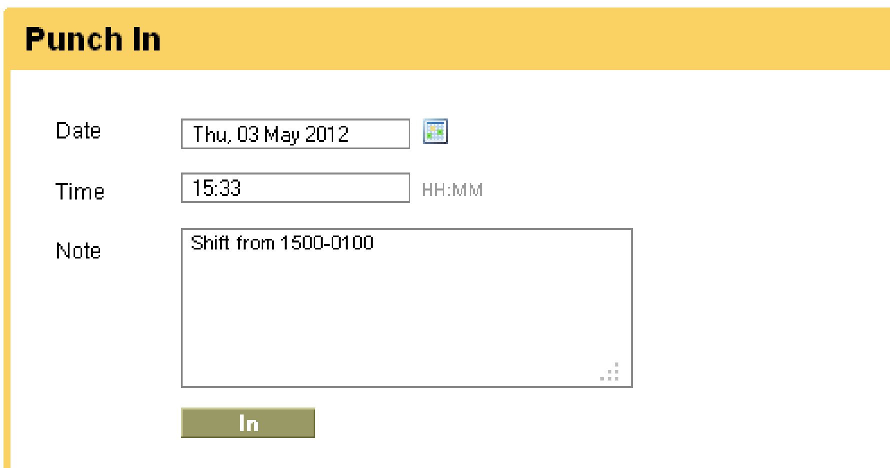


Figure 6.1: Punch In

*Note: If the HR Admin has configured the attendance settings, the “Time” and “Date” for both punch in/out could be modified, otherwise the system will automatically capture the “system date/time” and it cannot be modified.

Enter the relevant fields and click “In”, the screen as shown in Figure 6.2 will appear.

The details of your last punch in time will be populated below the screen as shown in Figure in 6.2. To punch out, click “Out”.

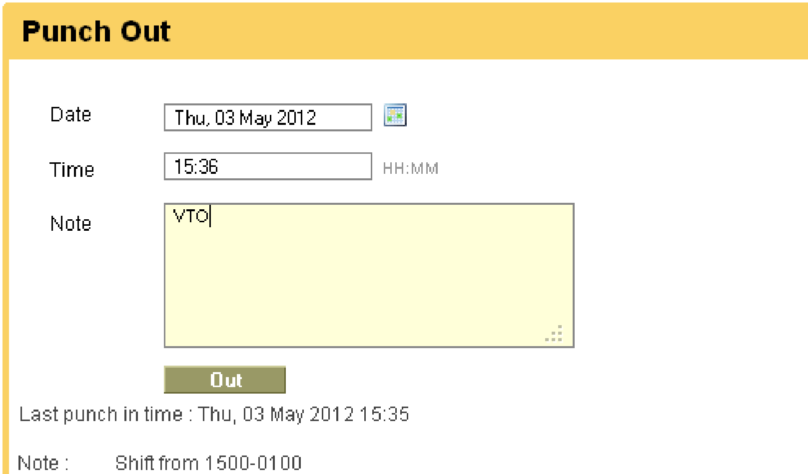


Figure 6.2: Punch Out

- ***My Records***

Once you have entered your Punch In/Out details, it will be listed under "My Records". To view details, go to **Time>> Attendance>> My Records** and the screen as shown in Figure 6.3 will appear.

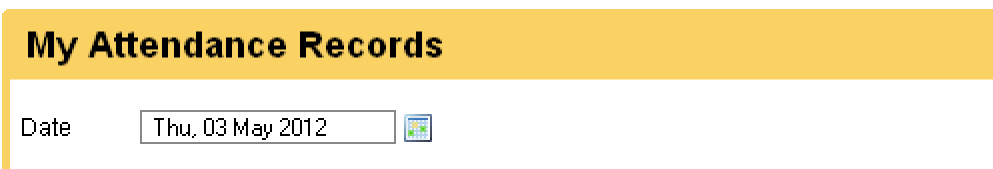
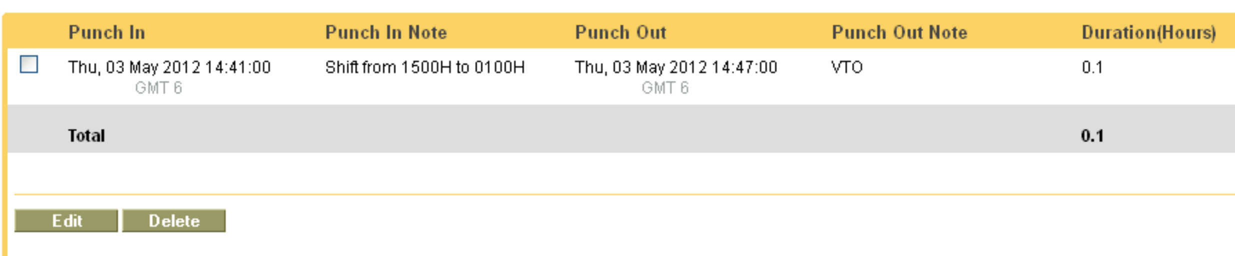


Figure 6.3: View My Records

Enter the date you want the attendance record to be shown and the screen as shown in Figure 6.4 will appear.



	Punch In	Punch In Note	Punch Out	Punch Out Note	Duration(Hours)
☐	Thu, 03 May 2012 14:41:00 GMT 6	Shift from 1500H to 0100H	Thu, 03 May 2012 14:47:00 GMT 6	VTO	0.1
	Total				**0.1**

Edit Delete

Figure 6.4: "My Records" in Details

*Note: If the HR Admin has configured the attendance settings the following options: "Edit" and "Delete" could be seen and selected otherwise these options will not be visible.

To edit the record, click “Edit” and enter the information.To delete the record, click on the check box beside the record and click “Delete”.

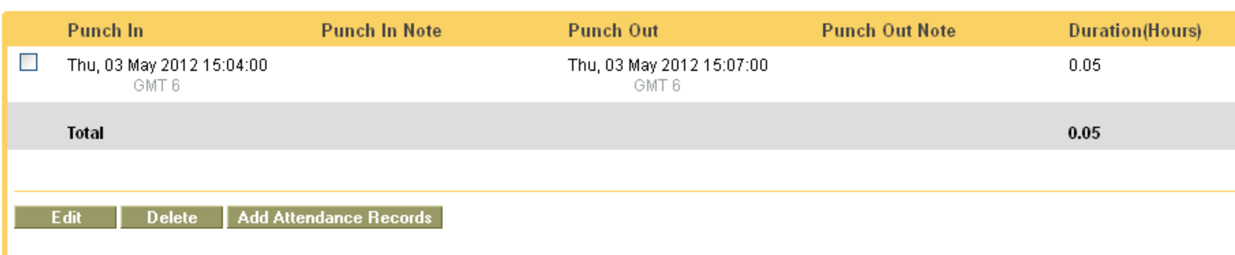
- ***Employee Records***

This feature is allows the ESS-Supervisor to view his/her subordinates attendance records.

To view employee records, go to **Time>> Attendance>> Employee Records** and the screen as shown in Figure 6.5 will appear.

Figure 6.5: 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 6.6 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 6.6: 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 check box 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.

6.3 Reports

This feature allows the ESS-Supervisor to run a report and view the project activities that his/her employee was assigned to and the time he/she has spent on the particular project. The ESS-Supervisor can also view a report of his subordinate's attendance and the number of hours he/she has spent while working in the company.

- ***Employee Report***

The ESS – Supervisors can view reports of projects that his subordinates were assigned to. Here the ESS -Supervisor can track the time an employee spent on particular activities.

To view an employee report, go to **Time>> Reports>>Employee Reports** and the screen as shown in Figure 6.7 will appear.

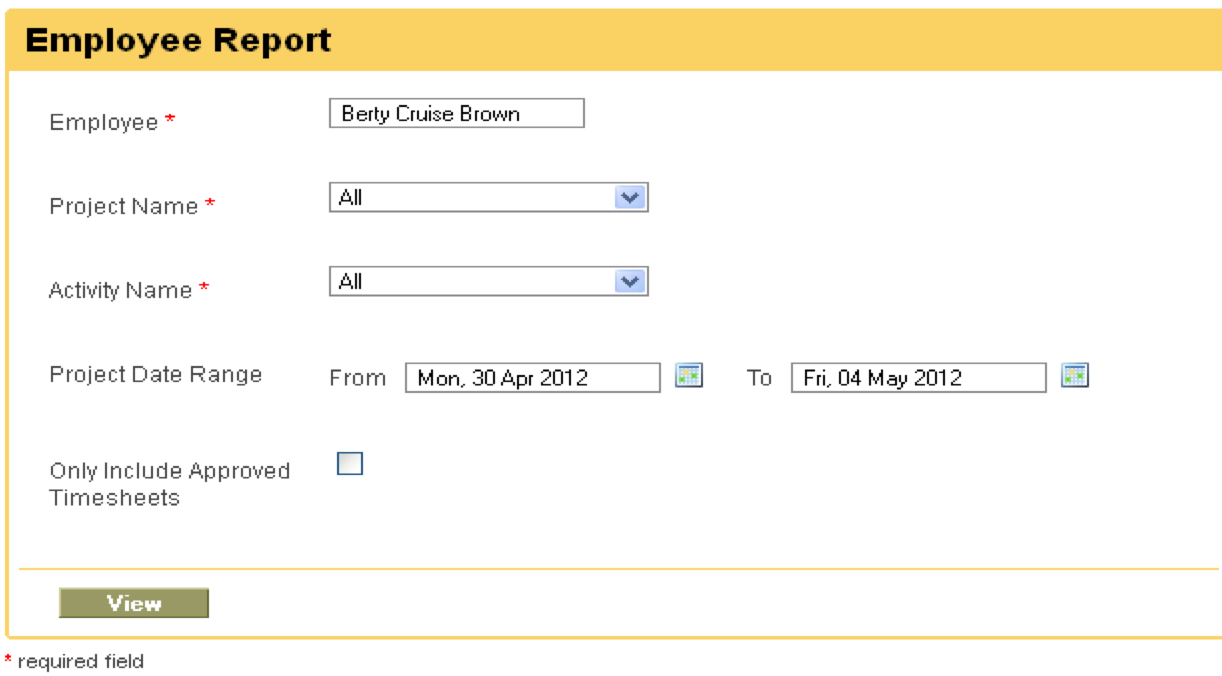


Figure 6.7: Run Employee Report

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 6.8.

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 6.8: Employee Report

- ***Attendance Summary***

The ESS-Supervisor can view the attendance summary of his/her subordinates where the 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 6.9 will appear.

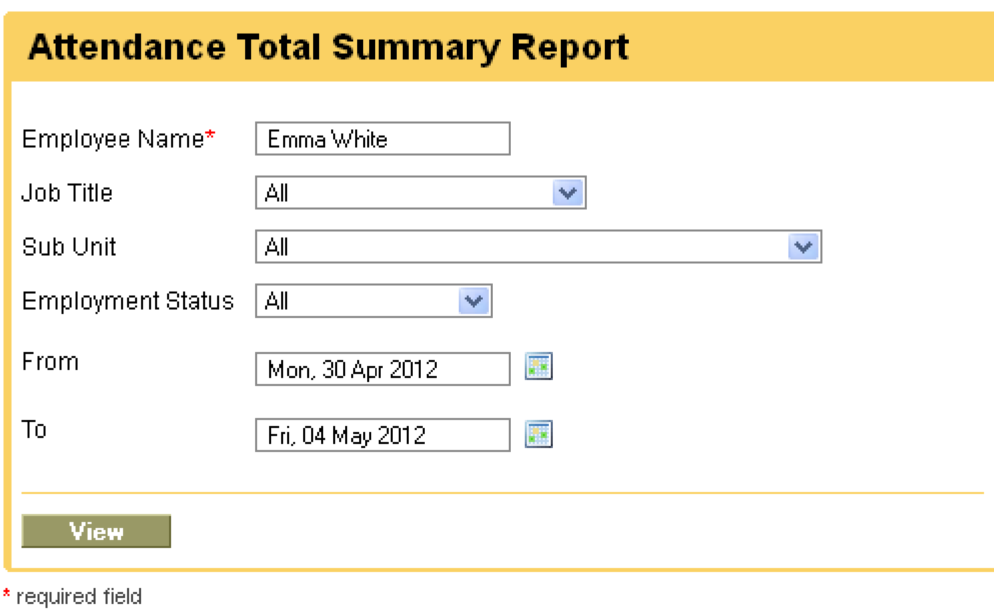


Figure 6.9: Run Attendance Summary Report

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 7.0 will appear.

Attendance Total Summary Report

Employee Name	Emma White
From	Mon, 30 Apr 2012
To	Fri, 04 May 2012

Employee Name	Time (hours)
Emma White	0.05
Total	

Figure 7.0: Attendance Summary Report

7.0 Performance

The ESS-Supervisor will be able to view his scheduled performance review by his particular supervisor/reviewer as well as the performance review of an employee where the ESS-Supervisor was assigned as the reviewer. To view your performance review, go to **Performance>>Reviews** and the screen as shown in Figure 7.1 will appear.

	Employee	Job Title	Review Period	Due Date	Status	Reviewer
	Olivia Potter	Team Leader	Tue, 15 May 2012 - Fri, 18 May 2012	Sun, 27 May 2012	Scheduled	Bazz Smith
	Olivia Potter	Team Leader	Fri, 11 May 2012 - Sun, 13 May 2012	Wed, 16 May 2012	Scheduled	Berty Brown
	Ann White	HR Executive	Fri, 11 May 2012 - Sun, 13 May 2012	Wed, 16 May 2012	Scheduled	Olivia Potter

Figure 7.1: Performance Review Summary

You will see the “Review Period” that your supervisor/reviewer would be conducting the performance review, when the review is “Due” to be submitted and the “Status” of the review and the name of the “Reviewer”.

At a glance you would know that you are the reviewer when you see the “Employee” name (whom you would be reviewing) underlined.

The outcome of your personal performance review will be hidden from you however you will be able to view the details of the performance review that you have conducted for a particular employee by clicking on the “Employee” name and the screen as shown in Figure 7.2 will appear.

Figure 7.2: Enter Performance Review Details

Click “Edit” to enter fields.

Once you have entered the necessary details and if you think, in the future, you would want to add more comments, click “Save” to save the current details and the details of the performance review will be reflected on the screen and the status will change from “Schedule” to “Being Reviewed” as shown in Figure 7.3

Figure 7.3: Being Reviewed

If you feel you have entered all the necessary feedback, click “Submit” to submit the outcome of the performance review and the screen as shown in Figure 7.3 will appear and the “Status” of the review will change from “Being Interviewed” to “Submitted”.

*Note: At any point, the HR Admin can track any status change in the performance review whether the employee is still “Being Interviewed” or the review is completed and “Submitted” to the Admin.

Figure 7.4: Submitted Performance Review

Click "Back" and the screen as shown in Figure 7.5 will appear showing the list of submitted performance reviews by the ESS-Supervisor which will then be either approved/rejected/edited by the HR Admin.

	Employee	Job Title	Review Period	Due Date	Status	Reviewer
	Julian Hudson	Sales Manager	Wed, 09 May 2012 - Thu, 10 May 2012	Wed, 16 May 2012	Submitted	Olivia Potter
	Olivia Potter	Team Leader	Tue, 15 May 2012 - Fri, 18 May 2012	Sun, 27 May 2012	Scheduled	Bazz Smith
	Olivia Potter	Team Leader	Fri, 11 May 2012 - Sun, 13 May 2012	Wed, 16 May 2012	Scheduled	Berty Brown
	Ann White	HR Executive	Fri, 11 May 2012 - Sun, 13 May 2012	Wed, 16 May 2012	Submitted	Olivia Potter
	Emma White	Team Leader	Tue, 08 May 2012 - Thu, 10 May 2012	Thu, 24 May 2012	Submitted	Olivia Potter

Figure 7.5: Performance Review List

8.0 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/support-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.

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