User Manual

OrangeHRM 2.5

Document Version 1.1

Table of Contents

1.0 Audience

This document is intended as a complete guide for using OrangeHRM 2.5. 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.

This document is an effort by the OrangeHRM team to improve the usability of OrangeHRM. We hope that you find it useful, and look forward to your comments.

2.0 Foreword

The next generation HR system OrangeHRM will change the way your company managed a vital asset of your company. Since 2006 Orange HRM has been researching and working on a way to produce a cost effective system to re-engineer your HR process. As a result of your contributions, support and our hard work, we are proud to bring you our latest release 2.5. With an improved and highly user friendly interface this new version is backed by many more new features.

The module based architecture has been a key user-friendly feature. The modules are as follows.

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, projects, memberships, qualifications etc.
- Add other administrators, and set access levels for each user
- Handling security issues
- Data importing and exporting
- Adding custom fields

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

PIM – Personal Information Module

This module maintains all relevant employee related information. All information about an employee can be entered here. Information captured in this module is utilized by all other modules, thus eliminating data redundancy. The PIM Module will be available to the admin with full control and supervisors with restricted access showing his subordinates.

ESS - Employee Self Service

A module available to general users allowing them to update vital information like contact details, education, skills, licenses etc. Certain fields that are defined by the admin cannot be changed e.g. Job and Salary.

The functionality of this module spans through the entire system, making information available anywhere, anytime. All information is subject to company defined security policy, where everyone can only view the information he/she is authorized to.

Leave Module

The Leave Module automates the HR administrative tasks of recording leave and controlling these against leave policies defined in the HR system. The module provides flexibility in allowing you to define various types of Leave, including Annual Leave, Sick Leave, Travel leave etc. The Leave Module has the ability to send notifications to covering officers and allows you to record, track leave and view leave history.

The web-enabled and self-service concepts significantly streamline all leave related procedures, eliminate paperwork and saves costs.

Time Module

Business-critical operations require reliable tracking and control in order to maximize profits and reduce operational costs. A time management tool is one of the vital employee work time management features that make the entire difference between successful HR-Management and a weak one.

The Time module automates the time tracking process. While allowing the employee to define and submit their timesheets the supervisors can approve/reject or even modify them. The employee will enter the punch in/out time hence allowing attendance monitoring. The Time module has the ability to track time spent on specific projects while project mangers can define projects.

Reports Module

Easy to use stand alone reports can be generated to meet your needs. While the number of reports is unlimited definitions can be saved to avoid duplication. Using various logical data combinations you can create reports to suit the purpose.

BUG Tracker

The Bug Tracker is integrated to report any bug that you come across. This feature will make sure that bugs are brought to our knowledge as soon as possible so that we can fix them promptly.

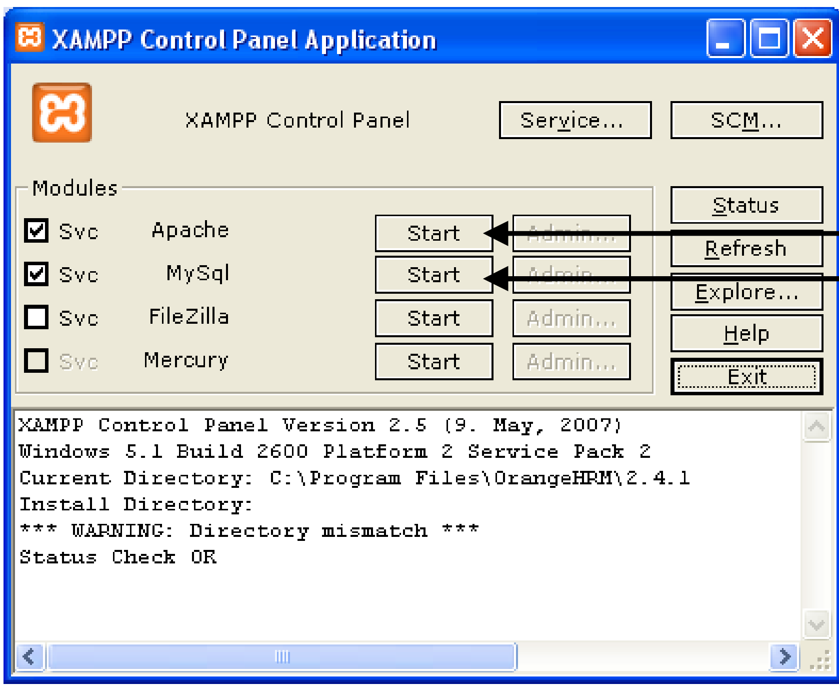
3.0 Login Information

3.1 Starting the AMP Stack

Once your OrangeHRM system is setup you need to make sure the AMP stack (Apache, MySQL and PHP) is activated and running since OrangeHRM requires these server applications to function.

To activate the AMP Stack;

- Go to the root folder where OrangeHRM 2.5 is installed
- Look for XAMPP-Control, double click to open
- Start The Apache and MySQL Servers



Click the start button for Apache and MySQL. Once started, it will indicate that they are running as shown on figure 3.1.2

Figure 3.1.1

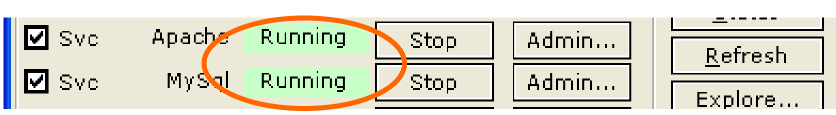


Figure 3.1.2

3.2 Logging In

- Open your browser and enter the URL for OrangeHRM e.g. http://localhost/orangehrm
- Enter the password and username that you provided during the installation.

Figure 3.2

3.3 Changing Your Password

Your password can be changed at anytime. Click on the “Change Password” link on the top right hand side as shown in the figure.

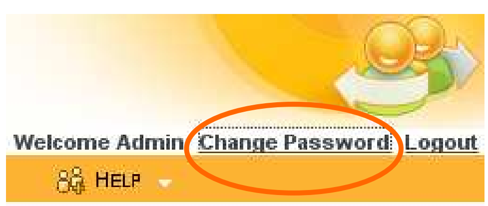


Figure 3.3.1

To change your password:

- Enter your current password next to “Old Password”
- Then enter the new password you intend to use next to “New Password”
- Re-enter the new password next to “Confirm New Password”

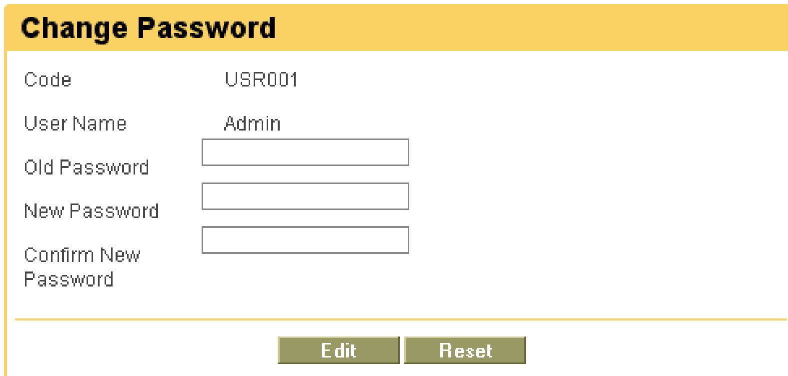


Figure 3.3.2

Once you have logged in you should be able to see the home page or otherwise the welcome screen shown in figure 3.2

Figure 3.3.3

3.4 Logging Out

To log out of the system you can click “Logout”.

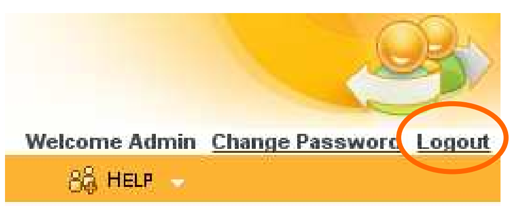


Figure 3.4

4.0 Admin Module

The Admin Module, the main point of control for the whole system. All administration tasks such as defining company information, job descriptions, qualifications, skills, memberships, nationality & race, users, setting up email notifications, project information, creating custom fields, setting up the Benefits module, and also is the only user with full control over the system.

The Admin Module allows you to Import and Export details on the PIM Module; this module also gives you the option of defining user rights.

The username and password provided at the installation will be your admin login.

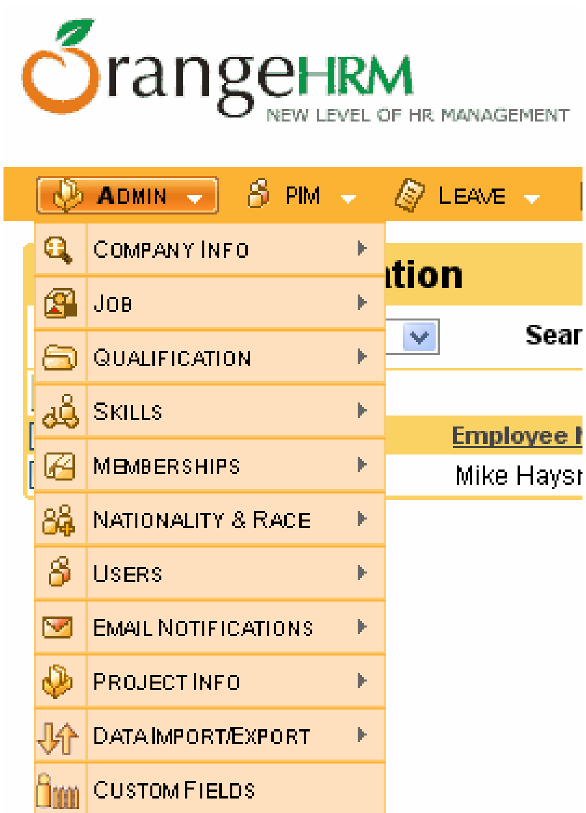


Figure 4.1

Company Info - Allows you to enter/store general company info, structure of the organization, locations of sites and property details.

Job – Define job tiles, specifications, pay grades, employment status and EEO job categories.

Qualification – Define various qualifications and license types.

Skills – Define skill sets and languages.

Memberships – Define membership types and memberships.

Nationality & Race – Define nationalities and ethnic races

Users – You can add multiple HR Admins who will control the system, create logins for general users through ESS Users and you can set access levels for the HR Admins by adding admin user groups.

Email Notifications – Configure all email notifications.

Project Info – Add customers, projects, project administrators and the activities for projects.

Data Import/Export – You can import Employee Information into the PIM Module into or csv files.

Custom Fields – Define a custom field for a type of information for the PIM Module that you require.

The Admin Module is only available to the administrator, an ESS User ESS or ESS - Supervisor cannot view the Admin Module unless a new user is created and an employee is assigned to use it. In this case the Admin can give this user full access or choose the privileges the particular user might require. For more information see chapter 4.7.3.

4.1 Company Info

All information about the company, the company structure, location, and company property can be defined here.

4.1.1 General

You can enter the basic details of the company here.

To start entering information click "Edit" and click "Reset" to reset.

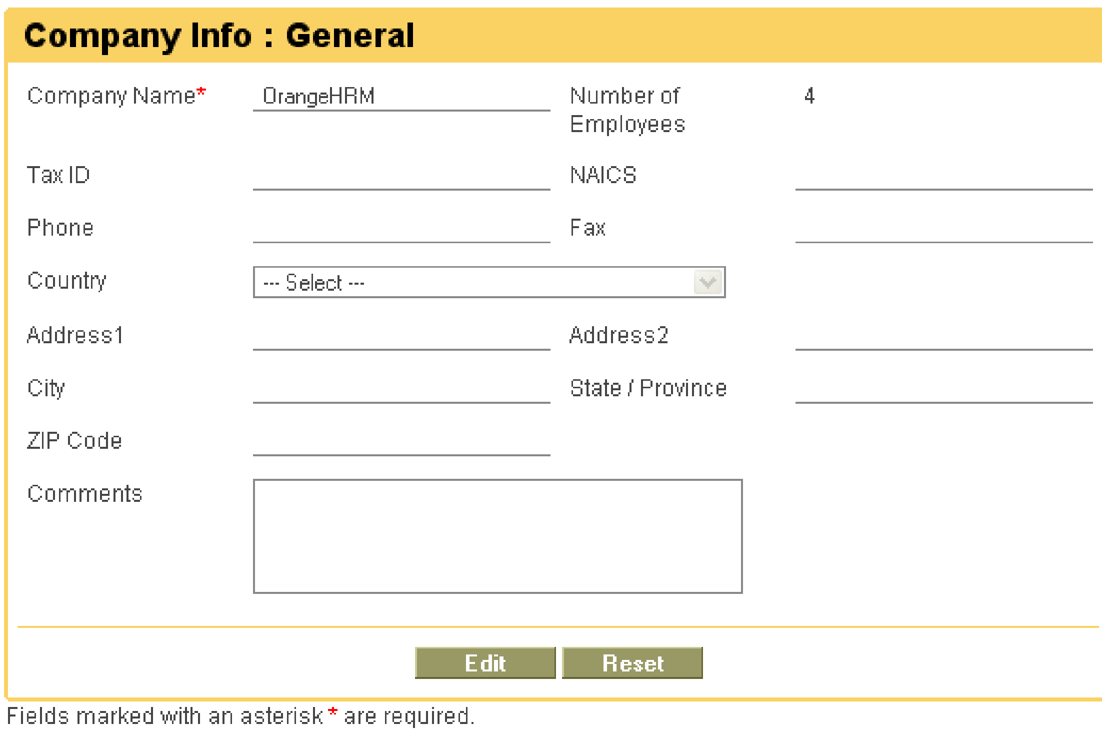


Figure 4.1.1.1

4.1.2 Locations

Here you can store all the details of sites, work stations, and branches in your company. Once you select the option from the menu the screen show on figure 4.1.2.1 will appear, to add a detail click “Add” and the screen on figure 4.1.2.2 will appear. Once you have added click “Save” and the location will be listed.

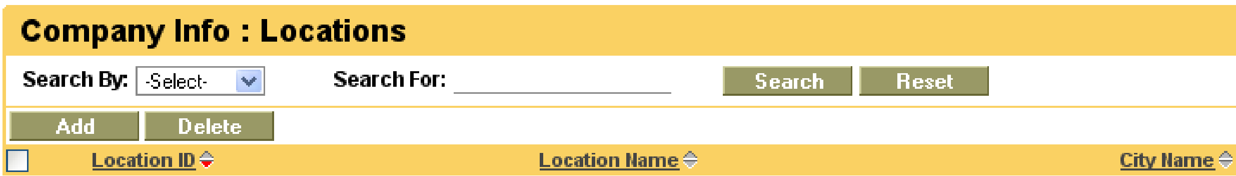


Figure 4.1.2.1

Once a location is added it will be listed as shown on figure 4.1.2.2. You can enter multiple locations. To view details of a location by click the Location Id, Location name, or City Name.

To delete a location click on the check box next to the location id, it is also possible to delete multiple entries at the same time. Once you have selected the entries you wish to delete simply click “Delete”.

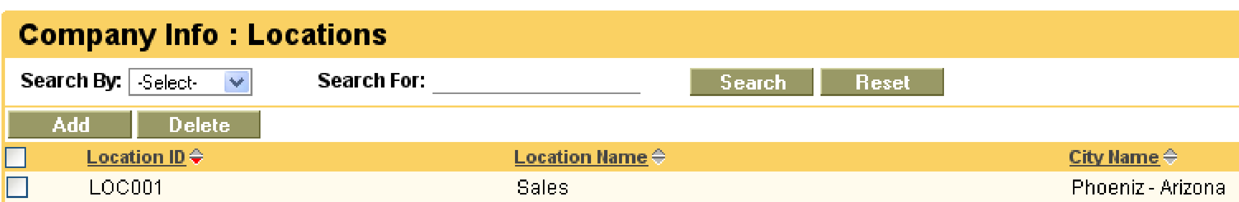


Figure 4.1.2.2

4.1.3 Company Structure

This feature as allows defining the hierarchy of the company. By defining departments, divisions and teams you can assign individuals with projects and track the location with ease. Since the parent company is already defined in the company info you will be able to see this once you select the company structure.

Please note that you need to define the company name of the parent company before you create the company structure.

Figure 4.1.3.1

To add a department to the company structure click on the “Add” button next to the parent company and the screen shown on figure 4.1.3.2 will appear.

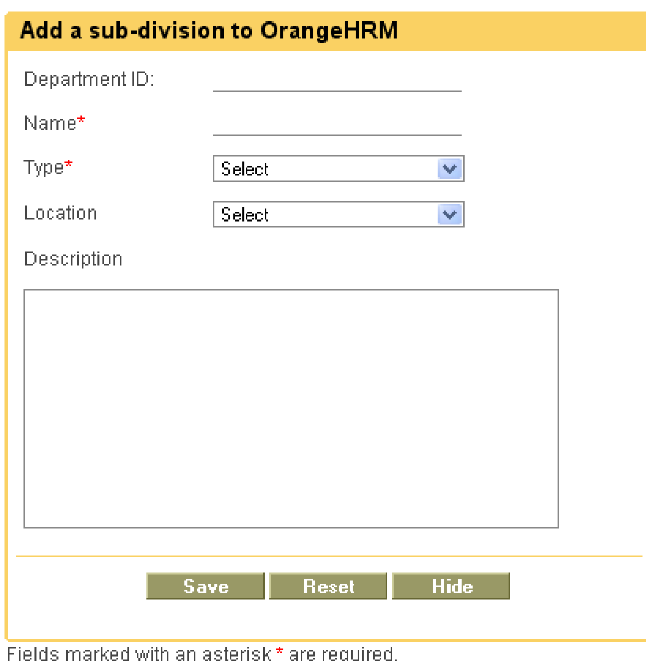


Figure 4.1.3.2

Once you have entered the fields click "Save" and the following screen shown in figure 4.1.3.3 will appear.

Figure 4.1.3.3

To add a sub-division click "+Add" option next to the relevant department, division or team as shown in figure 4.1.3.4.

Figure 4.1.3.4

To delete an entry, you can simply click "-Delete" next to the relevant department.

4.1.4 Company Property

The features allow entering details of company property and assign them to employees. This way you can track either who is in charge or who is using the property.

To add properties select “Company Property”, click “Add” and the following screen shown on figure 4.13.1 will appear.

Figure 4.1.3.1

Define the property and click “Save”, you can then assign an employee from the list of employees on the drop down under “Employee” and click “Save” as shown in figure 4.1.3.2.

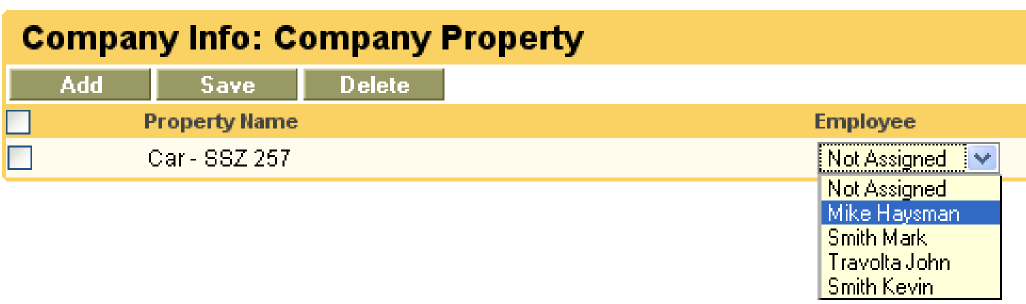


Figure 4.1.3.2

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

4.2 Job

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

- Job Titles
- Job Specifications
- Pay Grades
- Employment Status
- EEO Job Categories

4.2.1 Job Specifications

After selecting “Job Specifications” from the Job menu item click “Add” and the screen shown in figure 4.2.1.1 will appear.

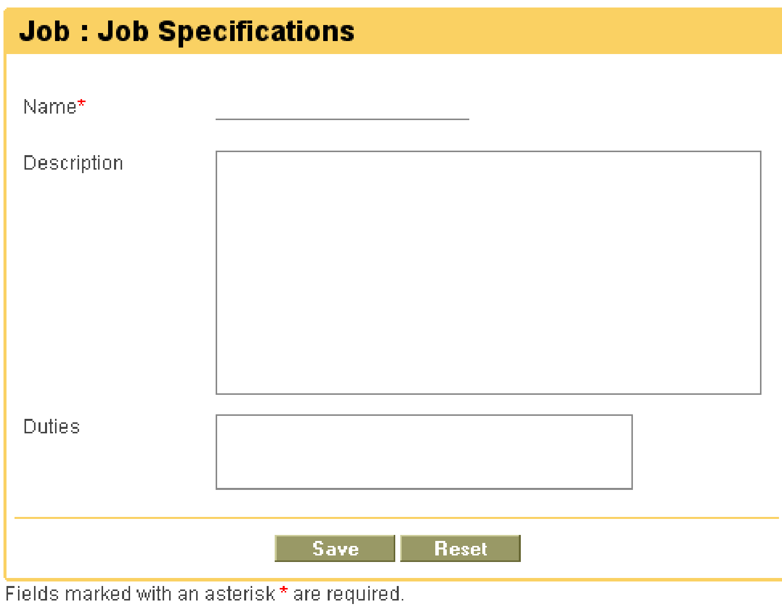


Figure 4.2.1.1

Enter the name, description and duties of the relevant job and click “Save” and all the specifications added will be listed as shown in figure 4.2.1.2. To delete an entry click on the check box next to the particular entry and press “Delete”. Multiple Job Specifications can be deleted simultaneously.

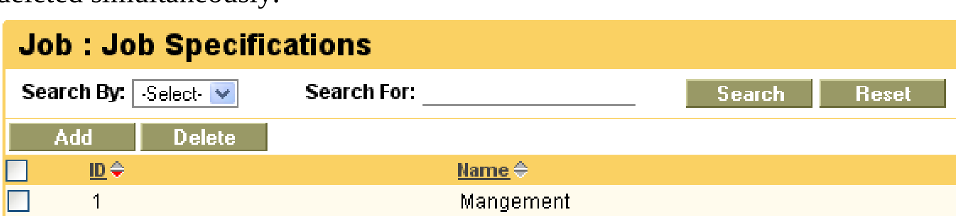


Figure 4.2.1.2

4.2.2 Pay Grades

Here you can define the pay grade by setting a minimum salary, maximum salary, step increase, and the currency to be paid in.

Select "Pay Grades" from the Job menu and click "Add" and define a name for the pay grade and click "Save".

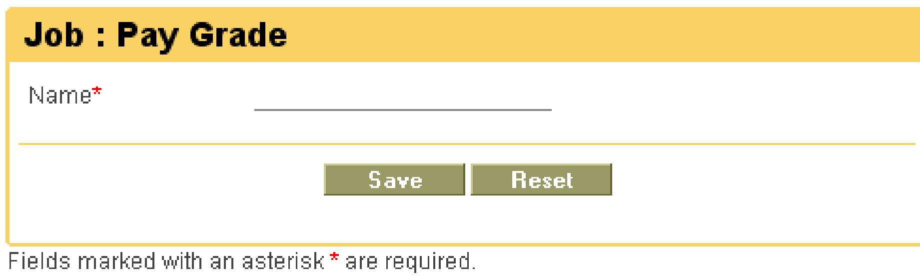


Figure 4.2.2.1

Once you click "Save" you will see the screen shown in 4.2.2.2. You can now define the pay grade by providing the details under "Assign New Currency". You can assign multiple currencies here.

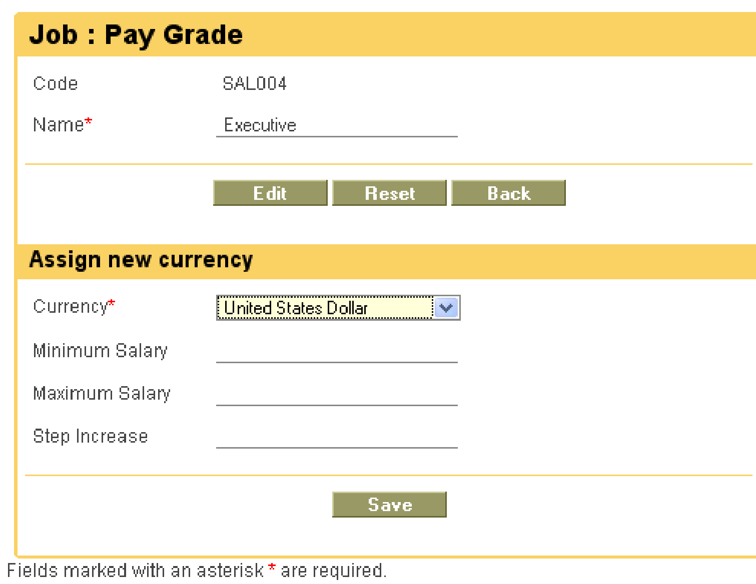


Figure 4.2.2.2

Each currency you define will listed as shown on figure 4.2.2.3

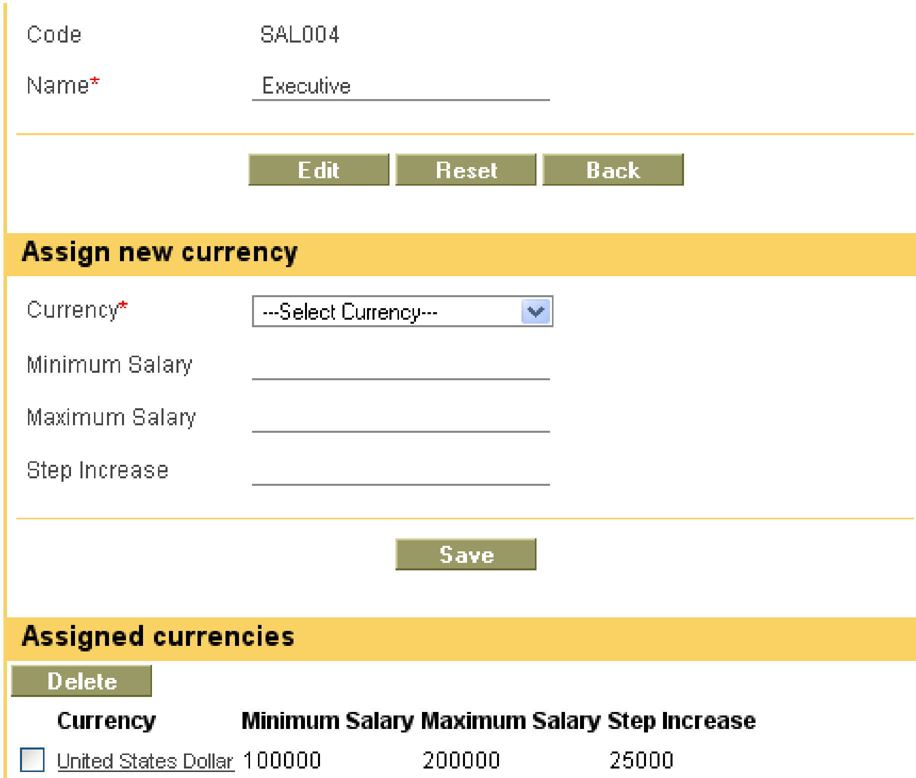


Figure 4.2.2.3

You can edit details of a particular currency by clicking on the currency e.g. United States Dollar.

All pay grades added will be listed as shown in figure in 4.2.2.4

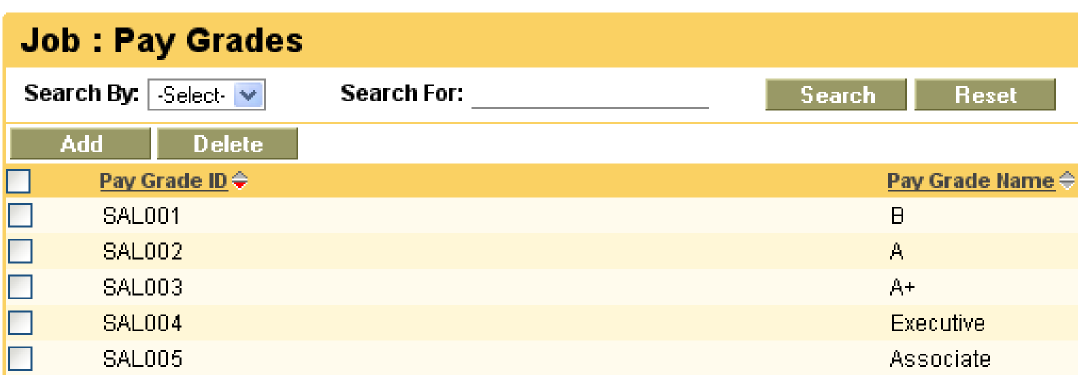


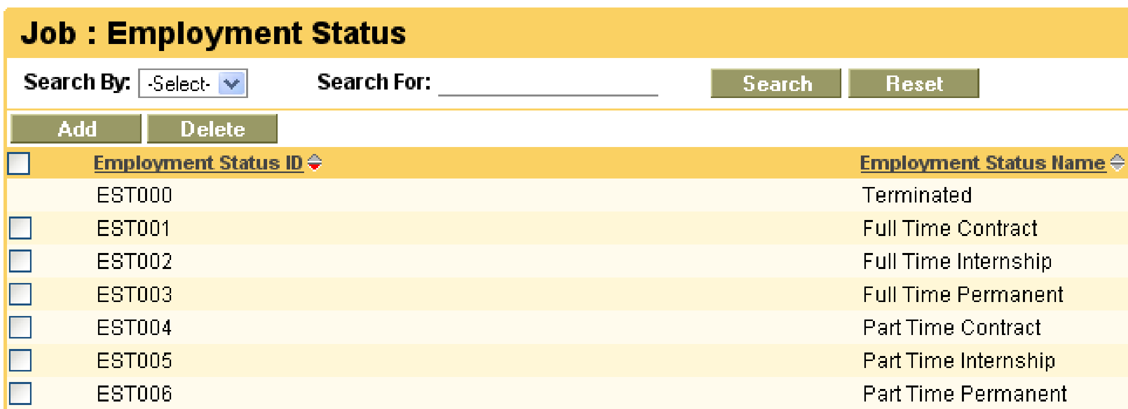
Figure 4.2.2.4

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

4.2.3 Employment Status

Employment Status allows you to define what basis he/she is hired in or if they are terminated.

By default you will see 7 types of statuses pre-defined, but you can either enter a new one or edit an existing one except for "Terminated". "Terminated" remains fixed you cannot delete this status.



Employment Status ID	Employment Status Name
EST000	Terminated
EST001	Full Time Contract
EST002	Full Time Internship
EST003	Full Time Permanent
EST004	Part Time Contract
EST005	Part Time Internship
EST006	Part Time Permanent

Figure 4.2.3.1

To add a new status click "Add" and the screen shown in figure 4.2.3.2 will appear.

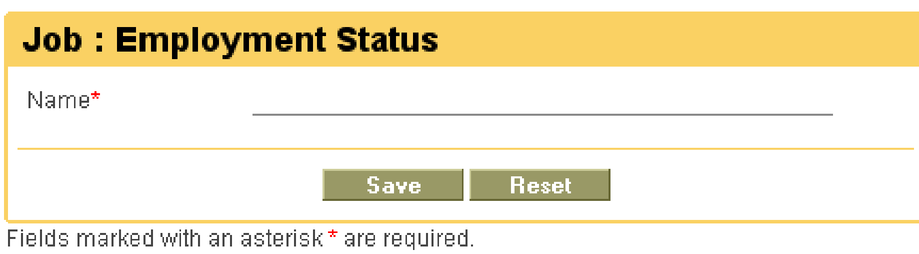


Figure 4.2.3.2

To edit an existing Employment status click on the "Employee Status ID" or "Employee Status Name" you wish to edit and click "Edit". Once you have made the change click "Save".

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

4.2.4 EEO Job Categories

Through this feature you can add, delete and edit EEO Job Categories. There are already 8 EEO Job Categories pre-defined.

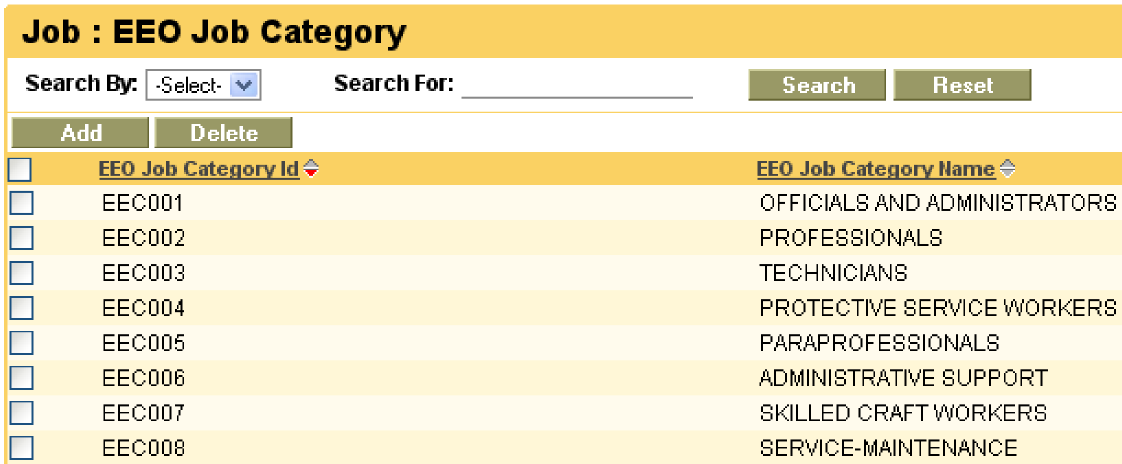


Figure 4.2.4.1

You can enter a new category by simply clicking “Add” and then defining a “Title” and click “Save”.

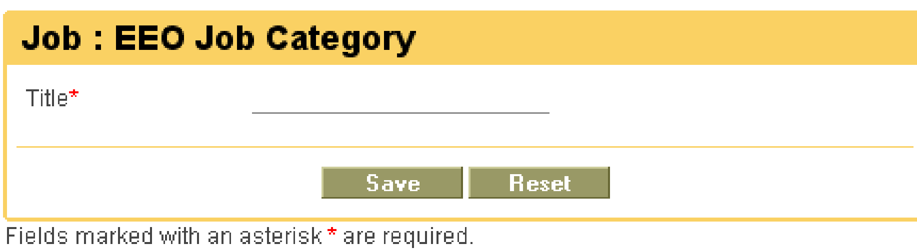


Figure 4.2.4.2

To edit an existing category click on the particular “EEO Job Category Name” or “EEO Job Category Id” then click “Edit” to do the changes and click “Save” once you are done.

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

4.3 Qualification

This feature allows you to define all information with regards to qualifications. You can define educational qualifications and licenses.

4.3.1 Education

You can define various types of educational qualifications of your choice which can be later used in the PIM Module.

To add an entry select “Education”, click on “Add” and you will see the screen shown on figure 4.3.1.1.

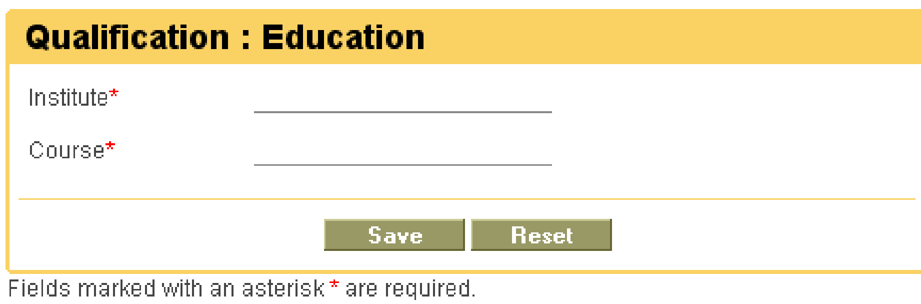


Figure 4.3.1.1

Fill the fields and click “Save” and you will see the entry as shown in figure 4.3.1.2.

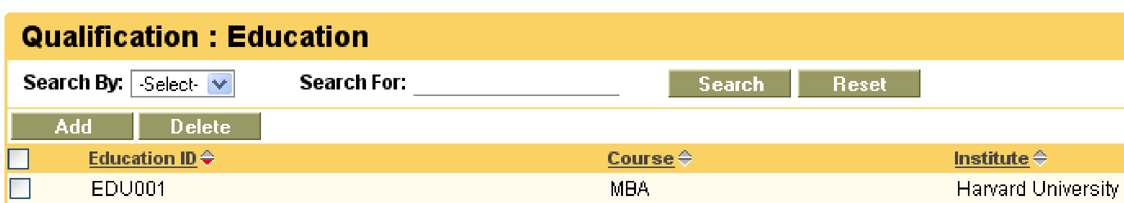


Figure 4.3.1.2

You can edit an entry by clicking on the particular “Education Id, Course or Institute”.

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

4.3.2 Licenses

You can define various types of licenses of your choice which can be later used in the PIM Module.

To add an entry select "License", click on "Add" and you will see the screen shown on figure 4.3.2.1.

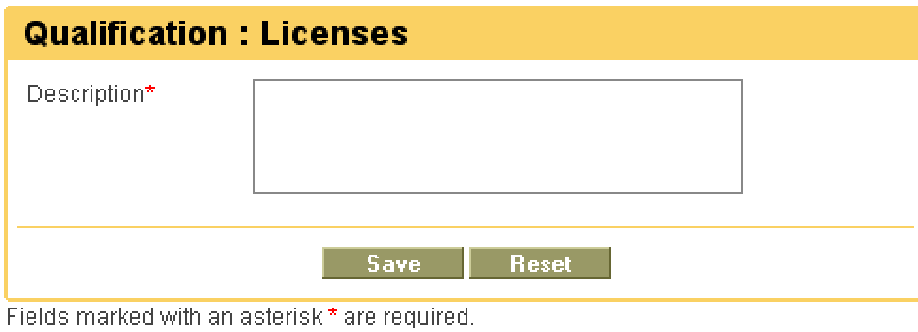


Figure 4.3.2.1

Key in a description for the type of license you wish to enter and click "Save". You will be then seeing your entry as shown in figure 4.3.2.2.

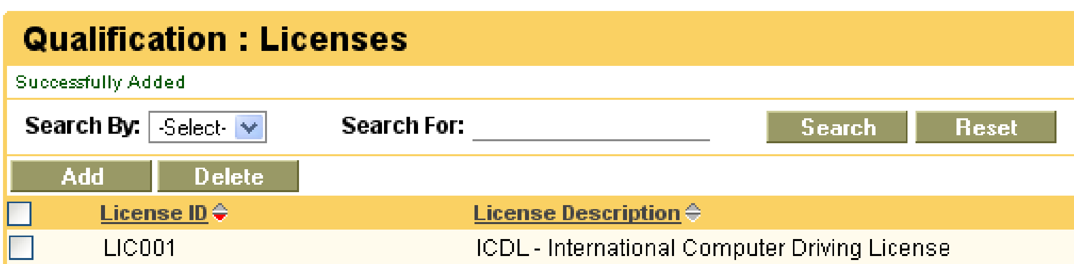


Figure 4.3.2.2

You can edit an entry by clicking on the particular "License Id, Course or License Description".

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

4.4 Skills

This feature allows you to define all information with regards to skills and languages.

4.4.1 Skills

You can define various types of skill sets which can be later used on the PIM Module. To add a skill click “Add”, you will then see the screen on figure 4.4.1.1.

Figure 4.4.1.1

Key in a name and description for the type of skill you wish to enter and click “Save”. You will be then seeing your entry as shown in figure 4.4.1.2.

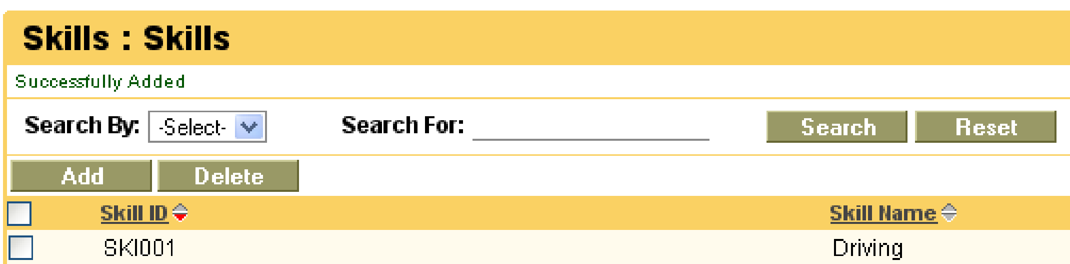


Figure 4.4.1.2

You can edit an entry by clicking on the particular “Skill Id or Skill Name”.
To delete an entry click on the check box next to the particular entry and press “Delete”.
Multiple selections can be deleted simultaneously.

4.4.2 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 a language select “Languages” and click on “Add”, you will then see the screen on figure 4.4.2.1.

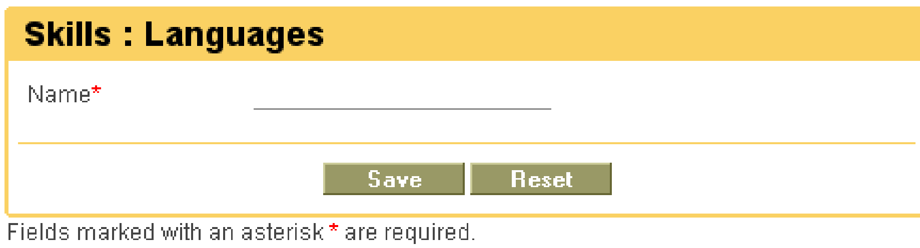


Figure 4.4.2.1

Fill the name of the language and click “Save” and you will see the entry as shown in figure 4.4.2.2.

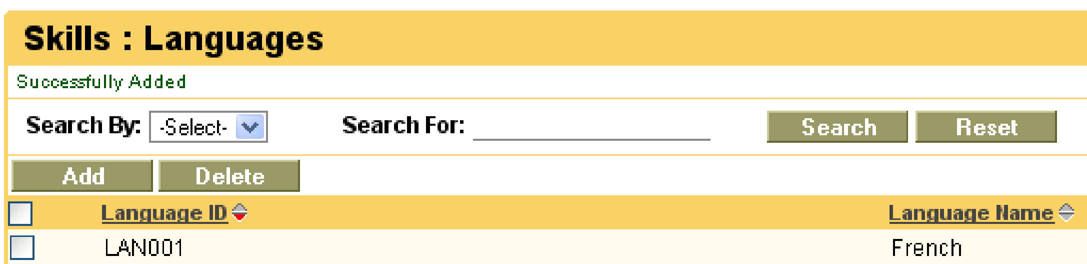


Figure 4.4.2.2

You can edit an entry by clicking on the particular “Language Id or Language Name”. To delete an entry click on the check box next to the particular entry and press “Delete”. Multiple selections can be deleted simultaneously.

4.5 Memberships

All information about membership types and memberships can entered here which can be later used in the PIM Module.

4.5.1 Membership Types

Various membership types can be defined here. To add a membership type go to “Membership Types” select “Add” and the screen shown on figure 4.5.1.1 will appear.

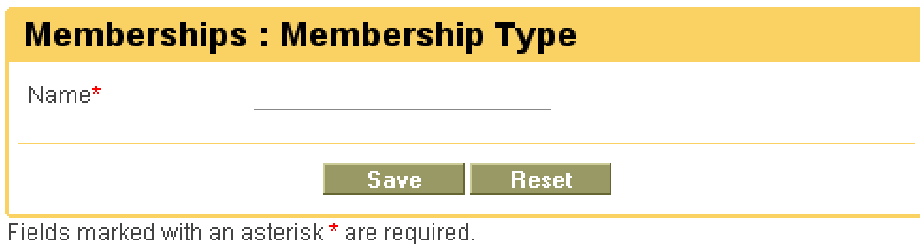


Figure 4.5.1.1

Fill the name of the membership and click “Save” and you will see the entry as shown in figure 4.5.1.2.

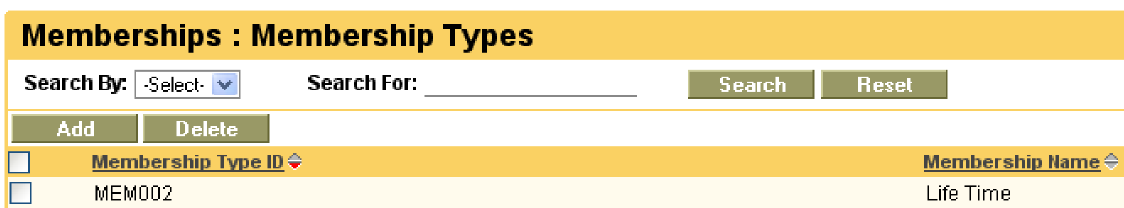


Figure 4.5.1.2

You can edit an entry by clicking on the particular “Language Id or Language Name”. To delete an entry click on the check box next to the particular entry and press “Delete”. Multiple selections can be deleted simultaneously.

4.5.2 Memberships

You can define memberships here. To add a membership click “Add”, you will see the screen shown in figure 4.5.2.1.

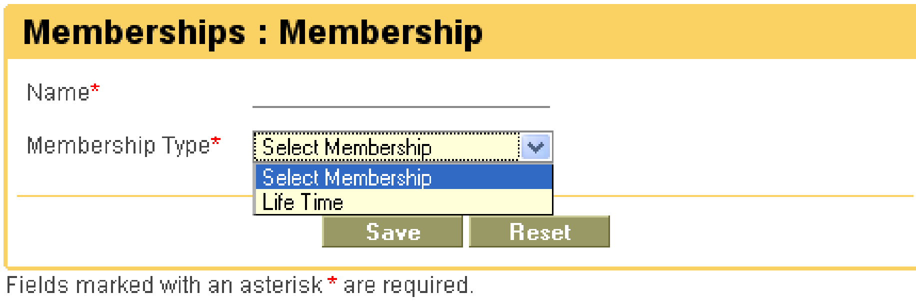


Figure 4.5.2.1

Fill the name of the membership and select from one of the membership types which you defined earlier and click “Save” and you will see the list of memberships as shown on figure 4.5.2.2.

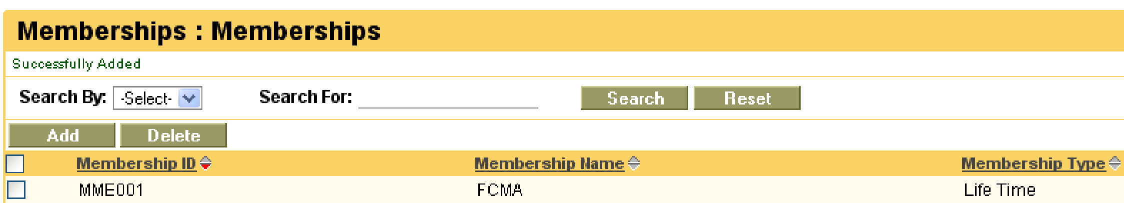


Figure 4.5.2.2

You can edit an entry by clicking on the particular “Membership Id or Membership Name”. To delete an entry click on the check box next to the particular entry and press “Delete”. Multiple selections can be deleted simultaneously.

4.6 Nationality and Race

All information about nationalities and ethnic races can entered here which can me later used in the PIM Module.

4.6.1 Nationality

Various nationalities can be defined here. To add a nationality go to “Nationality” select “Add” and the screen shown on figure 4.6.1.1 will appear.

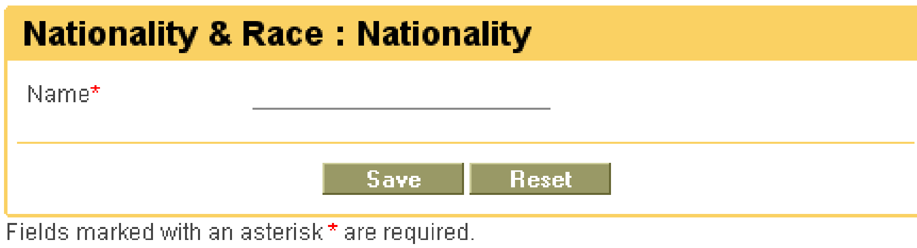


Figure 4.6.1.1

Fill the nationality name and click “Save” and the nationalities you defined will appear as shown on figure 4.61.1.

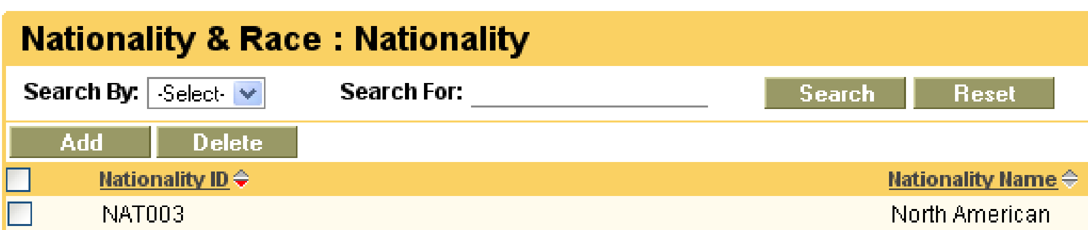


Figure 4.6.1.2

You can edit an entry by clicking on the particular “Nationality Id or Nationality Name”. To delete an entry click on the check box next to the particular entry and press “Delete”. Multiple selections can be deleted simultaneously.

4.6.2 Ethnic Races

Different types of ethnic races of the employees can define here. To add a race select “Ethnic Races” and click on “Add” you will the see the screen show on figure 4.6.2.1

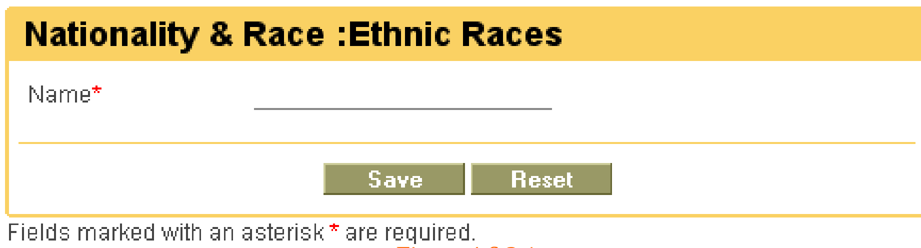


Figure 4.6.2.1

Fill the race name and click “Save” and the names you defined will appear as shown on figure 4.6.2.2.

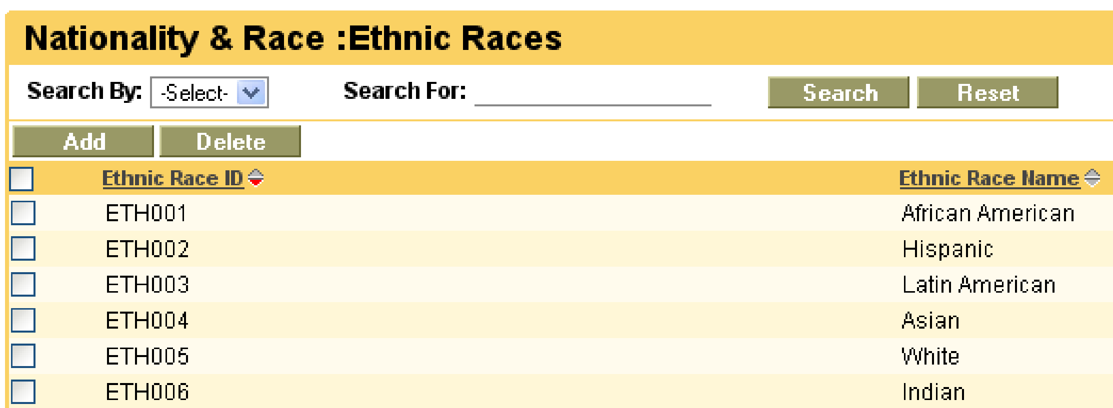


Figure 4.6.2.2

You can edit an entry by clicking on the particular “Ethnic Race Id or Ethnic Race Name”. To delete an entry click on the check box next to the particular entry and press “Delete”. Multiple selections can be deleted simultaneously.

4.7 Users

Administering of users by creating logins, groups and defining privileges are done through this menu Item.

4.7.1 HR Admin Users

HR Admin Users feature allows you to create special logins for HR personnel. The Admin can decide into what user group he will fall into. Read chapter 4.7.3 on how to define user groups.

To create an HR Admin User select “HR Admin Users” and click on “Add” you will then see the screen on figure 4.7.1.1.

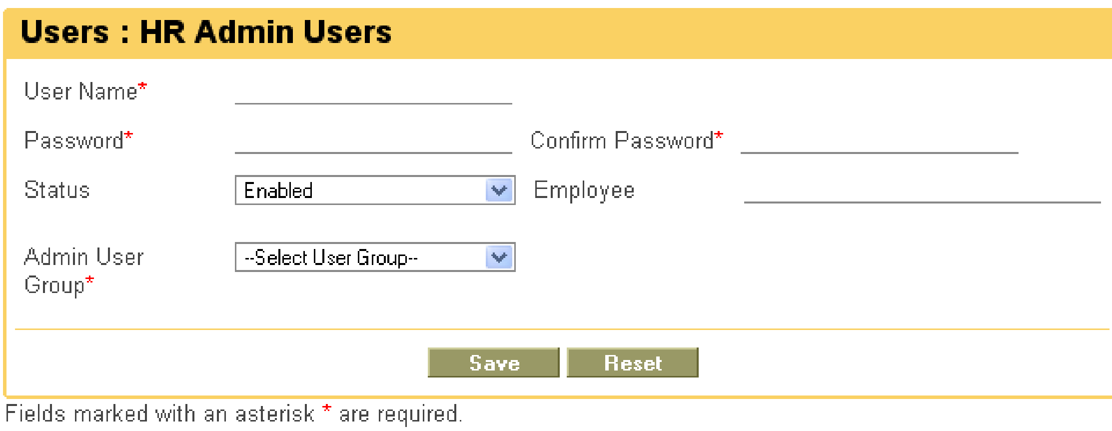


Figure 4.7.1.1

Enter the following to create a user

- Username
- Password
- Confirm Password (Re-enter the password)
- Status – Enabled or disabled
- Employee – If the HR Admin user is an existing employee you can select him from here, but the employee needs to be defined in the PIM Module.
- Admin User Group - Depending on the privileges the user needs you can assign him to a user group. Please note that the default user group available will be Admin, assigning this group will give the user full access. Read chapter 4.7.3 on how to define user groups.

Once you have defined the fields click “Save” and the group will be listed as shown on figure 4.7.1.2.

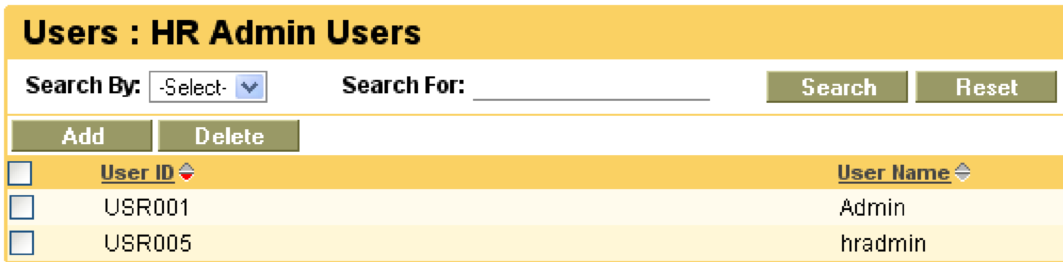


Figure 4.7.1.2

You can edit an entry by clicking on the particular “User Id or User Name”.

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

4.7.2 ESS Users

Through the ESS Users function you create user accounts for all the employees in your company. In other words here you can create a username and password for the ESS User. This information has to be communicated to user manually.

To create a user account select “ESS User” and click on “Add” and the screen shown on figure 4.7.2.1 will appear.

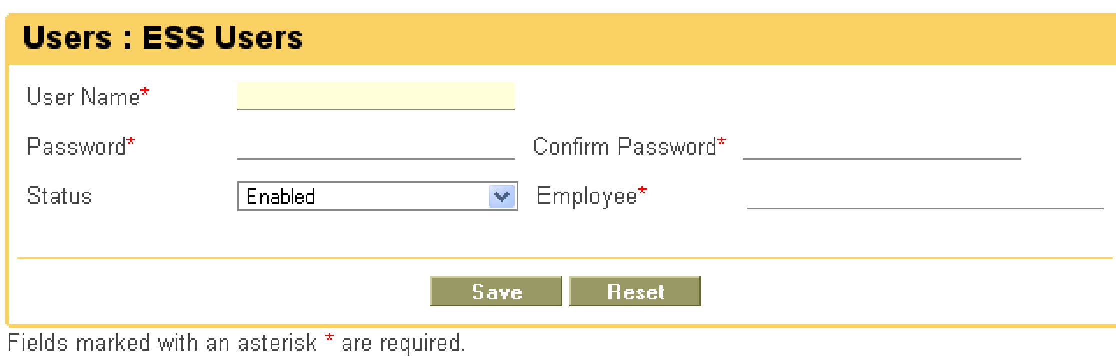


Figure 4.7.2.1

Enter the following to create a user

- Username
- Password
- Confirm Password (Re-enter the password)
- Status – Enabled or disabled

- Employee – Select the employee who will be using this username and password. Please note that employee information needs to be defined in the PIM Module before creating user accounts. For more information see chapter 5.0

In case the ESS User forgets the password the admin can simply type in new or default password for the user by selecting the particular employee from the ESS Users menu and click "Edit" and type in the new or default password and click "Save."

The user accounts you create will be listed as shown in figure 4.7.2.2.

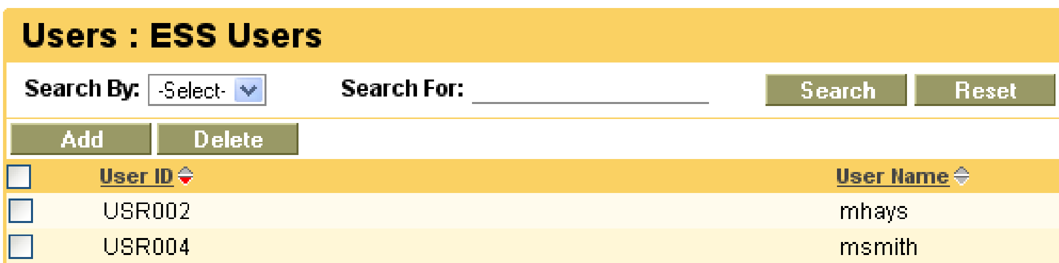


Figure 4.7.2.2

4.7.3 Admin User Groups

By defining user groups full or partial access can be given to other HR personnel or employees of your choice. The admin can select what modules and in each module what privileges he/she will have in them. E.g. Read, Write, Delete or Full Control.
These groups will be then available for selection on the drop down menus in the HR Admin Users.
You can create an Admin User Group by following the steps below:

- Select "Admin User Group" and click "Add" you will then see the screen shown on figure 4.7.3.1.

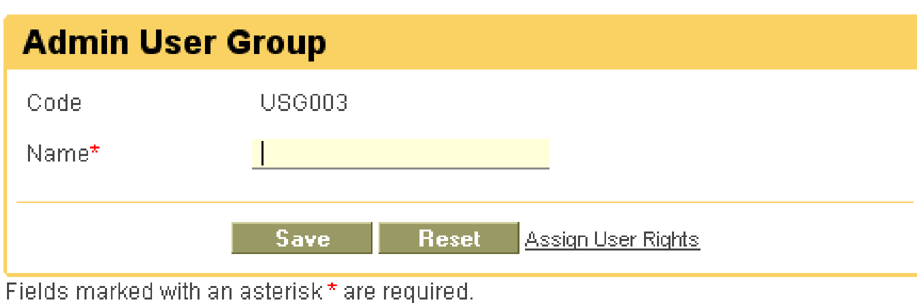


Figure 4.7.3.1

➢ Enter a name for the user group and click “Save”, you will then see the screen shown on figure 4.7.3.2.

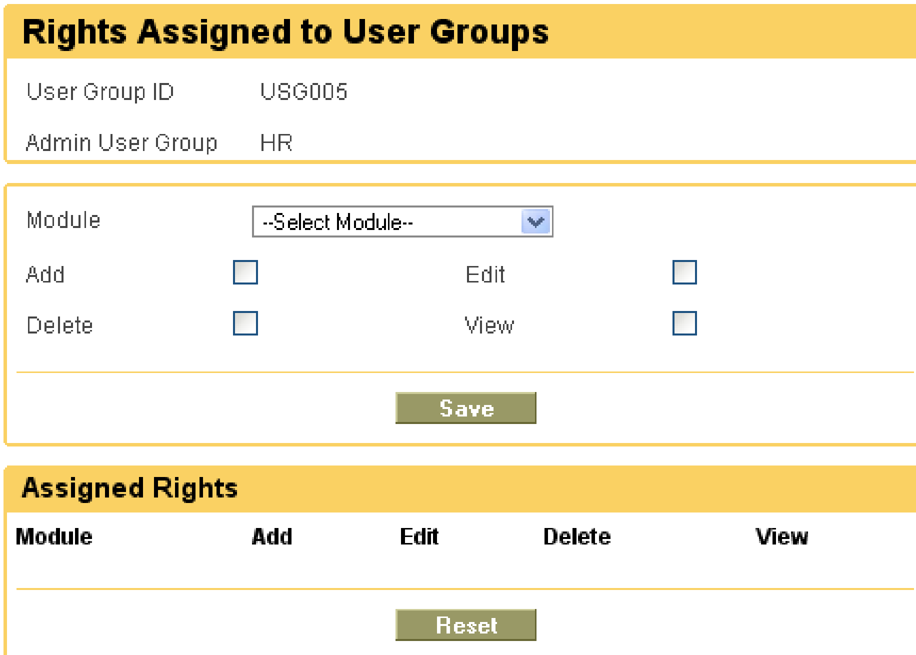


Figure 4.7.3.2

➢ From the drop down box next to module, select the particular module and set the rights by clicking on the check boxes.

- ✓ Add – Will allow you to add information to the particular module.
- ✓ Delete – User can delete information from the particular module.
- ✓ Edit – Will allow the user to edit information previously entered.
- ✓ View – The user will be only able to view information on the particular module.

Once you set rights to a particular module click "Save" and you will see your entry as shown on figure 4.7.3.3.

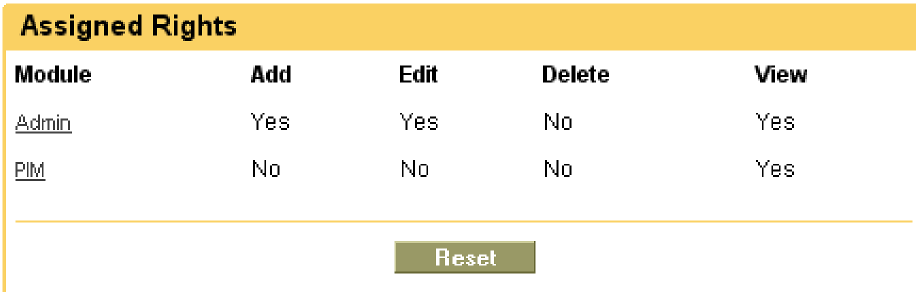


Figure 4.7.3.3

You can define many groups with various privilege combinations. The groups you create will be listed as shown on figure 4.7.3.4

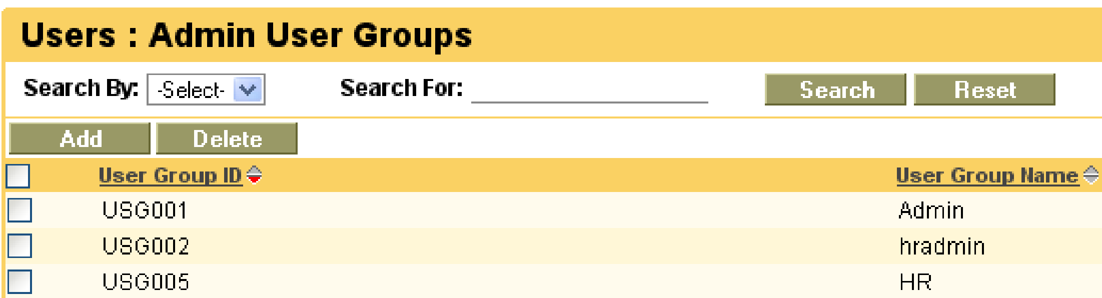


Figure 4.7.3.4

You can edit an entry by clicking on the particular "User Group Id or User Group Name". To delete an entry click on the check box next to the particular group and press "Delete". Multiple selections can be deleted simultaneously.

4.8 Email Notifications

This feature allows you to subscribe to receive notifications and to configure the parameters to setup the email so that notifications with regards to the following will be sent to the relavant people which will quicken the communications;

- Leave applications
- Leave approvals
- Leave cancellations
- Leave rejections
- Job Applications
- New employee hire approval requests
- Tasks sent on hiring of employee
- Notifications of hiring new employees
- HSP notifications

4.8.1 Configuration

Configuration of mail settings is essential to accommodate sending and receiving notifications related to the operations performed within OrangeHRM (for example, leave management and time sheet administration). Figure 4.8.1.1 shows the email configuration screen.

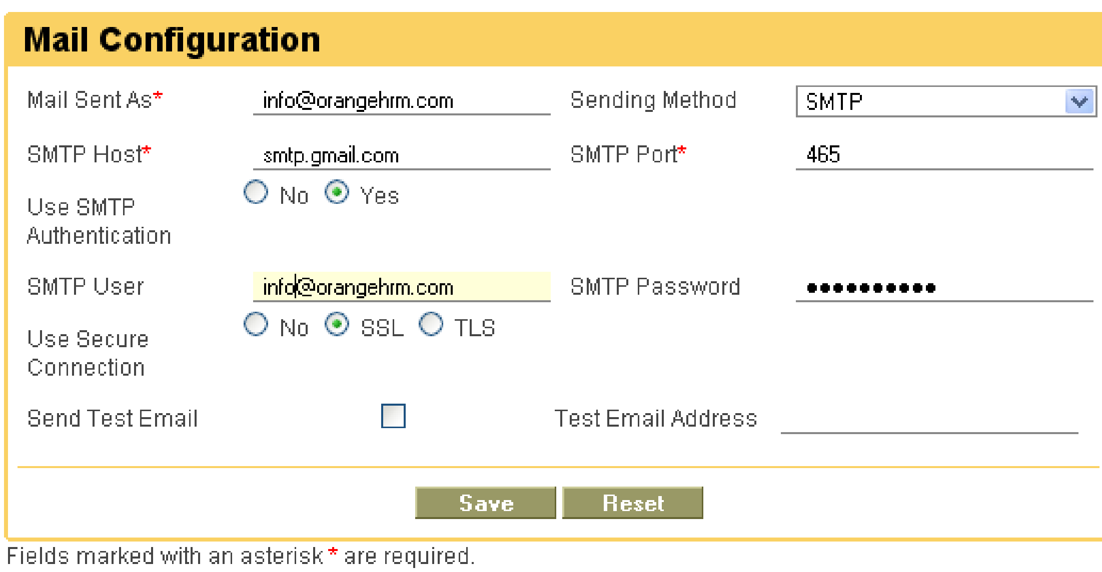


Figure 4.8.1.2

Enter the fields accurately and you can check by sending a test mail to an email address of your choice.

Click "Save" when you have entered all the settings and you check the email account if you specified an address to receive the test mail.

4.8.2 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 can also select what copies of notifications he should receive.

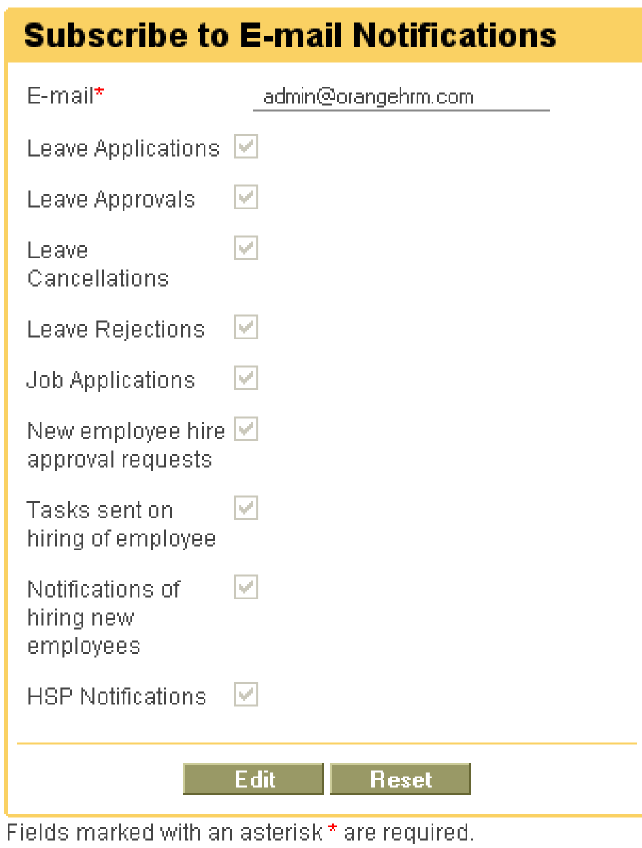


Figure 4.8.2.1

Click "Edit" to define the email address and then select the notifications that you wish to receive by clicking on the check boxes. Please note that by default all notifications will be checked.

4.9 Project Info

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

4.9.1 Customers

You can enter details of your customers that can be used to define projects and project activities.

To add a customer select "Customers" and click "Add" you will then see the screen shown on figure 4.9.1.1.

Figure 4.9.1.1

Enter the details and click "Save" and the customers will be listed as shown on figure 4.9.1.2

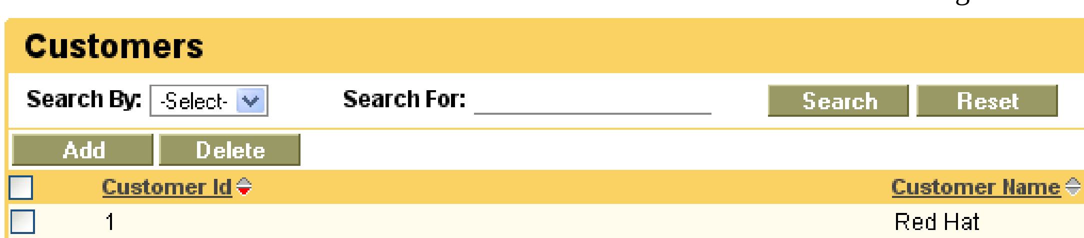


Figure 4.9.1.2

You can edit an entry by clicking on the particular "Customer Id or Customer Name".

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

4.9.2 Projects

The administrators are able to define the projects, which were/are/will be managed by the company. The projects being displayed are shown on the figure 4.9.2.1.

To add a project click “Add” and the screen shown on figure 4.9.2.1 will appear.

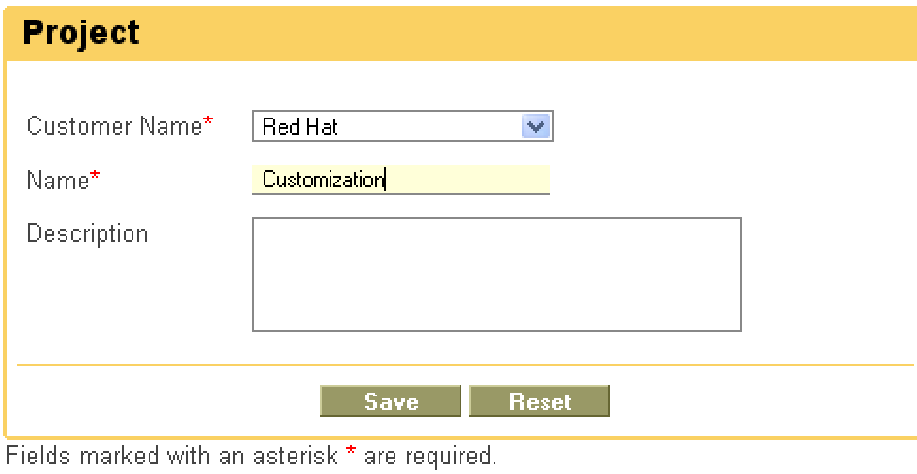


Figure 4.9.2.1

Once you have defined the project, click “Save” and the “Project Administrators” option will appear as shown on figure 4.9.2.2

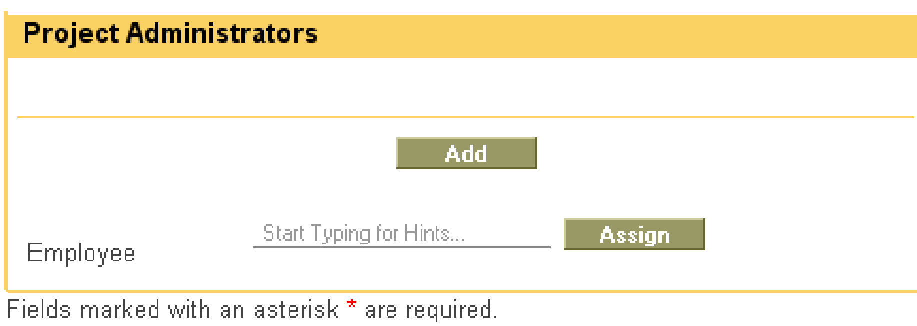


Figure 4.9.2.2

Click “Add” to assign employees who will be handling the project. You can also add multiple employees. Enter the name of the employee and click “Assign” you will then see the list as shown on figure 4.9.2.3.

Figure 4.9.2.3

You can add or delete employees from the project at any point of time you wish.

The Project Activities entered will be listed as shown on figure 4.9.2.4.

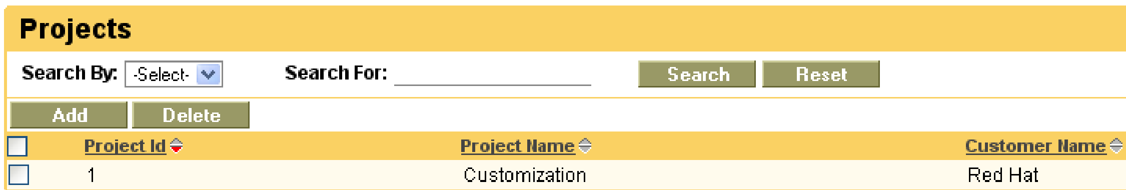


Figure 4.9.2.4

You can edit an entry by clicking on the particular "Project Id or Project Name".

To delete an entry click on the check box next to the particular project and press "Delete".

Multiple selections can be deleted simultaneously.

4.9.3 Project Activities

This section allows managing the activities, associated with the projects, that the company is undertaking.

Select "Project Activities" and the screen shown on figure 4.9.3.1 will appear.

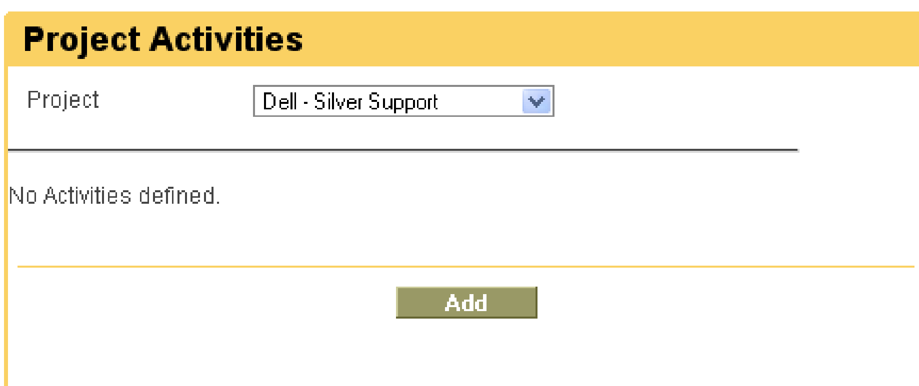


Figure 4.9.3.1

To define activities to a project select the particular project from the drop down and then click "Add" and you will then see a text box where you can define the activities.

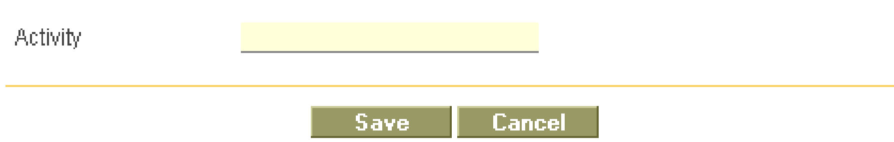


Figure 4.9.3.2

You can add multiple activities to a project.

- Administrator – HRAdmin – can manage the activities for any project of the company.
- Project Administrator – ESS User assigned as the Project Administrator for one or more projects – can manage the activities only for his projects.

The activities you enter will be listed as shown on figure 4.9.3.3.

Figure 4.9.3.3

You can edit the activity by clicking on the particular activity and delete activities by clicking on the check boxes.

Multiple selections can be deleted simultaneously.

4.10 Data Import / Export

This feature allows importing and exporting of data in and out of the PIM module. Rather than feeding employee details one by one you can import details from a csv file or you can export details all of the employees out of the system into a csv file for any other use.

4.10.1 Define Custom Export

You can define criteria that need to be exported. A custom export is already defined if you are using Millennium Payroll. You can define many export criteria with different combinations which can be used in the "Export" feature.

To define a custom export select "Define Custom Export" and click "Add" you will then see the screen shown on figure 4.10.1.1.

Figure 4.10.1.1

Define a Name for the export and select the fields you need to be exported from "Available Fields" on the right of the screen and click "Add". To add multiple fields press "Control" on your keyboard while selecting.

Once you have added those fields they will reflect on the "Assigned Fields".

To remove fields from the "Assigned Fields" select the fields and click "Remove".

You arrange them in any order by selecting the fields and moving then up or down using the arrows on the right of the screen.

Click “Save” once you are done and you will see the export criteria you defined as shown on figure 4.10.1.2

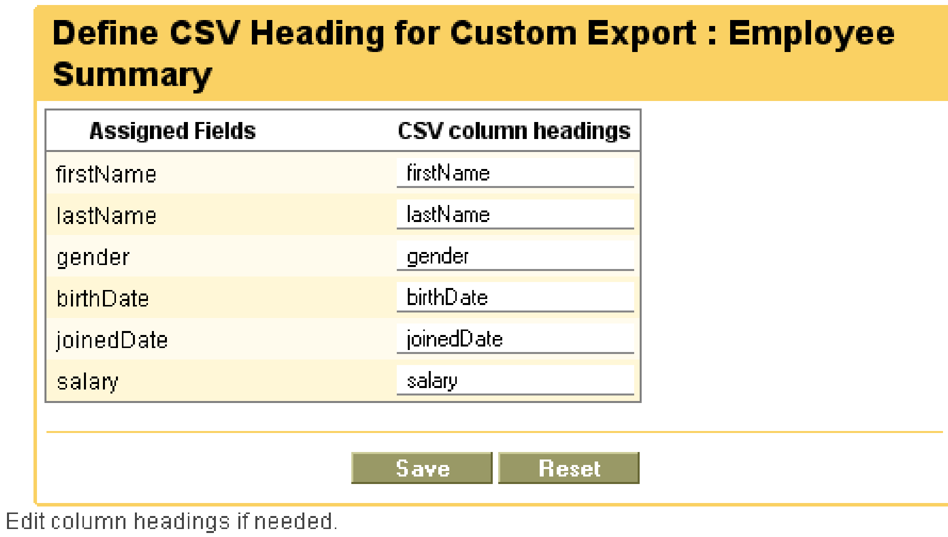


Figure 4.10.1.2

Here you can edit the headings of the columns that need to be reflected on the csv.

For e.g. you can select the “Salary” field to reflect as “Remuneration” or any heading of your choice on the CSV.

Click “Save” again to confirm and then you will see the custom export you defined as shown on figure 4.10.1.3.

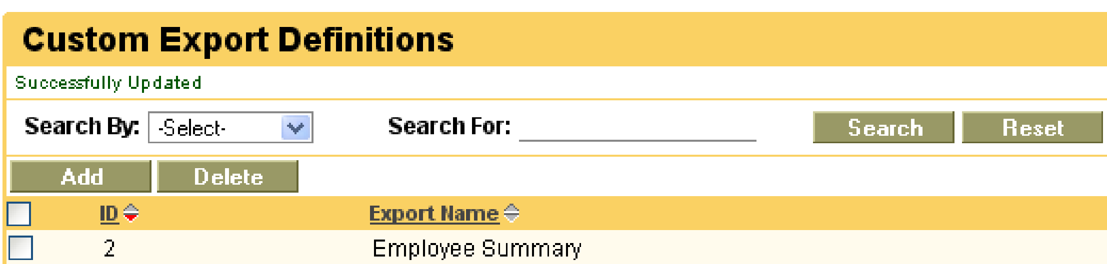


Figure 4.10.1.3

You can edit an entry by clicking on the particular “Id or Export Name”.

To delete an entry click on the check box next to the particular entry and press “Delete”.

Multiple selections can be deleted simultaneously.

4.10.2 Export

Export allows exporting data from the PIM Module on to a csv file depending on the custom exports that were defined earlier.

To export data select a defined export from the drop down and click “Export”. You will then receive a message asking to save or open your report. See figure 4.10.2.1 and figure 4.10.2.2.

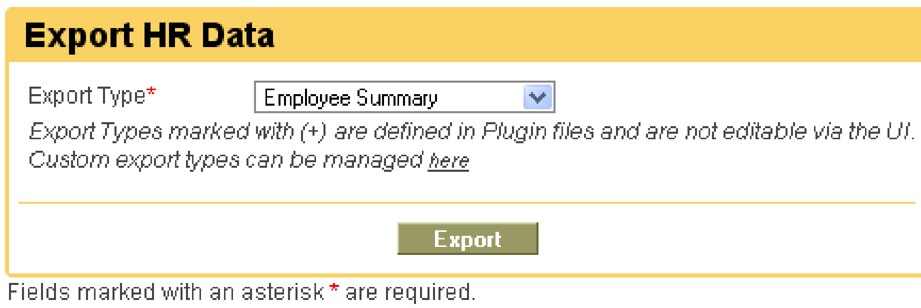


Figure 4.10.2.1

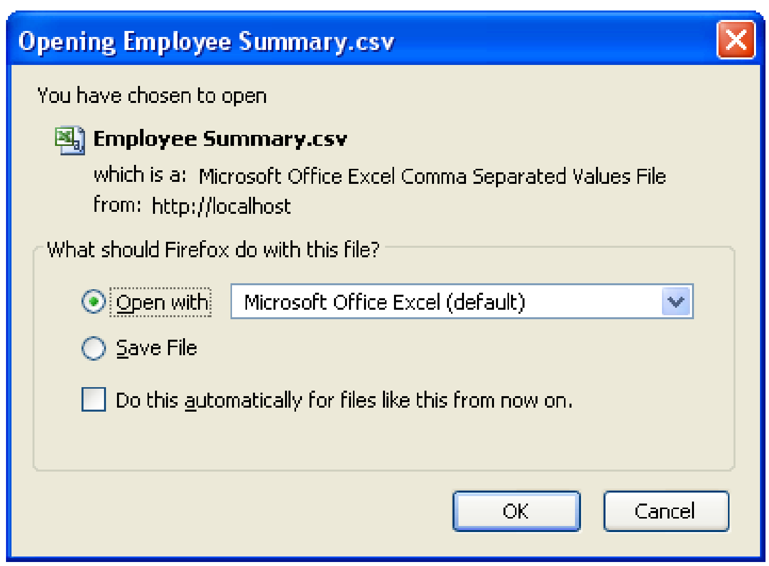


Figure 4.10.2.2

4.10.3 Define Custom Import

You can define criteria that need to be imported. You can define many import criteria with different combinations which can be used in the “Import” feature.

To define a custom export select “Define Custom Import” and click “Add” you will then see the screen shown on figure 4.10.3.1.

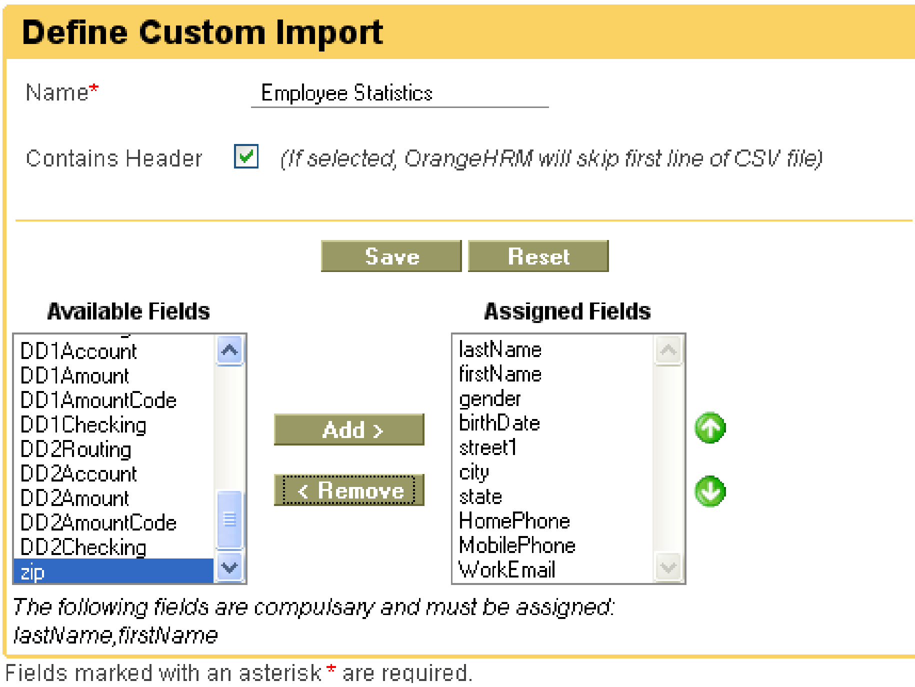


Figure 4.10.3.1

Define a Name for the import and select the fields you need to be imported from “Available Fields” on the right of the screen and click “Add”. To add multiple fields press “Control” on your keyboard while selecting.

Once you have added those fields they will reflect on the “Assigned Fields”.

To remove fields from the “Assigned Fields” select the fields and click “Remove”.

You arrange them in any order by selecting the fields and moving then up or down using the arrows on the right of the screen.

Click “Save” and the custom import you defined will appear as shown on figure 4.10.3.3.

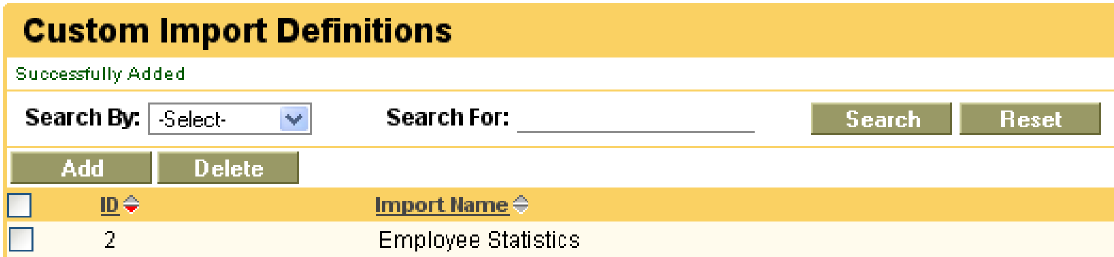


Figure 4.10.3.2

You can edit an entry by clicking on the particular “ID”.

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

4.10.4 Import

Import allows importing data from the CSV’s on to the PIM Module depending on the custom exports that were defined earlier. Make sure the fields defined on the custom import matches those fields on the csv.

To Import data select a defined import from the drop down and click “Browse” to select the csv file that contains the details that need to be important. If your import is successful you will see the screen shown on figure 4.10.4.3 and the employees you added will reflect on the PIM Module.

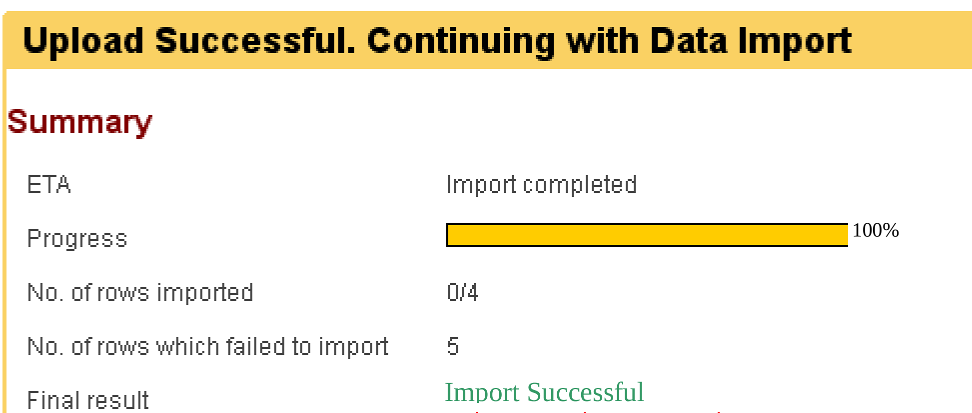


Figure 4.10.4.3

4.11 Custom Fields

Custom fields can be defined which will reflect in PIM Module to define employees. You can define a custom field if you need to enter any information that is not available on the PIM Module.

To add custom fields select “Custom Fields”, click “Add” and then you will see the screen shown on figure 4.11.1.1.

Figure 4.11.1.1

Enter a “Field Name” and “Type” by selecting either information to be a string type or drop down. If you select drop down enter allowed options separated by commas. Click “Save” and you will see the screen shown on figure 4.11.1.2 with the fields you defined.

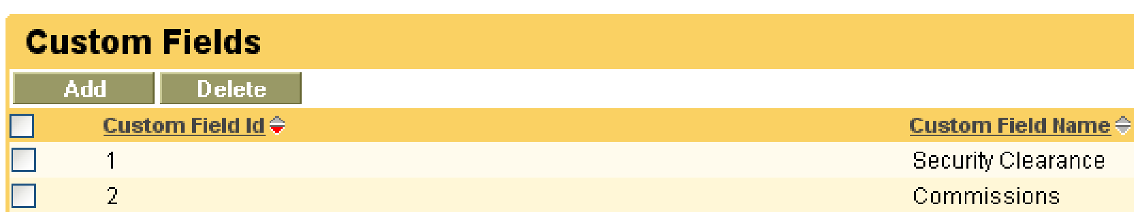


Figure 4.11.1.2

You can now see these fields on the PIM Module under "Custom" as shown in figure 4.11.1.3 and 4.11.2.4.

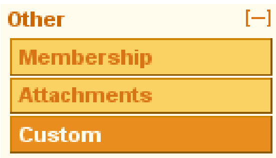


Figure 4.11.1.3

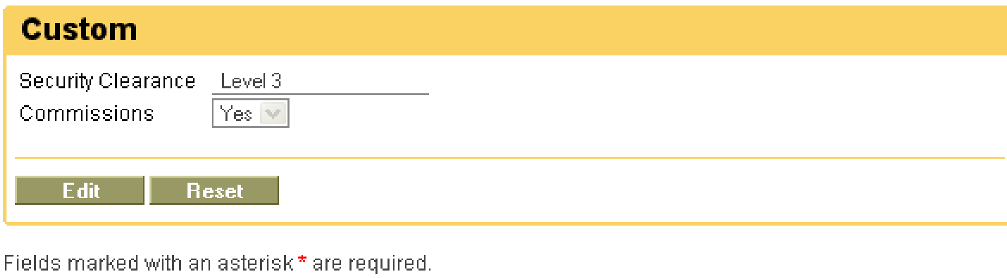


Figure 4.11.1.4

You can edit an entry by clicking on the particular "Custom Field Id or Custom Field Name". To delete an entry click on the check box next to the particular entry and press "Delete". Multiple selections can be deleted simultaneously.

5.0 PIM Module

This core module maintains all relevant employee related information, including different types of personal information, detailed qualifications and work experience, job related information etc. Information captured in this module is utilized by all other modules, thus eliminating data redundancy.

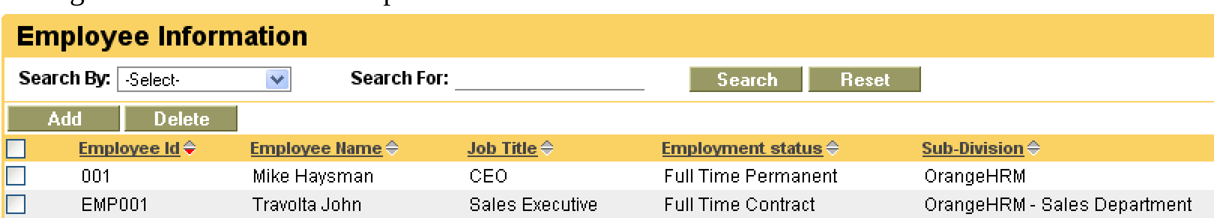
Records can be either entered manually one by one or imported from a csv file. You cannot import all the details but you can edit the remaining fields.

Figure 5.1

5.1 Employee List

Lists all the employees' entered and imported into the PIM. You can view details of a particular employee by clicking on the employee's name.

Figure 5.1.1 shows an example.



Employee Id	Employee Name	Job Title	Employment status	Sub-Division
001	Mike Haysman	CEO	Full Time Permanent	OrangeHRM
EMP001	Travolta John	Sales Executive	Full Time Contract	OrangeHRM - Sales Department

Figure 5.1.1

You can edit an entry by clicking on the particular "Employee Name".

To delete an entry click on the check box next to the particular entry and press "Delete".

Multiple selections can be deleted simultaneously.

5.2. 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 simply click on “Add Employee” under the “PIM” menu and the following screen shown on figure 5.2.1 will be shown.

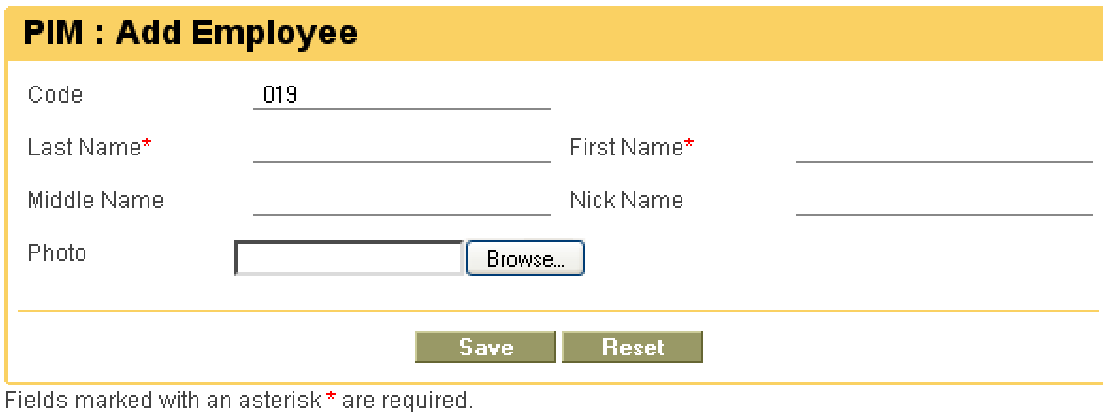


Figure 5.2.1

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

Please note that the maximum file size of the picture cannot exceed 1 megabyte and the picture should be in .jpg.

Click “Save” when you have finished and you will see the screen shown on figure 5.2.2

Figure 5.2.2

The menu on the left will show all the possible information that can be entered about an employee.

5.2.1 Personal details

Once you have added an employee from the screen shown on figure 5.2.1 and save the "Personal Details" is the default screen you would see with the details you entered about him. You can then edit the other personal information listed below by clicking "Edit" on the bottom of the screen.

You can edit the following;

- Code – Employee Id/No
- Last Name
- First Name
- Middle Name
- Nick Name
- SSN No. – Social Security Number
- Nationality – Select from a list of pre-defined nationalities
- SIN No. – Social Insurance Number
- Date of Birth – Select the date by clicking on the calendar icon or enter manually with Year-Month-Date
- Other Id
- Marital Status – Select from the drop down
- Smoker – If the employee is a smoker click on the box
- Gender – Click on the relavant gender
- Driver's License Number
- License Expiry Date
- Military Service
- Ethnic Race – Select from a list of pre-defined ethnic races

Once you completed this form click "Reset" to RESET the details that were entered last or click "Save" to save the information. You can also add details later on.

5.2.2 Contact Details

Contact information of an employee can be entered from here. You will see the screen shown on figure 5.2.2.1 when you select “Contact Details”.

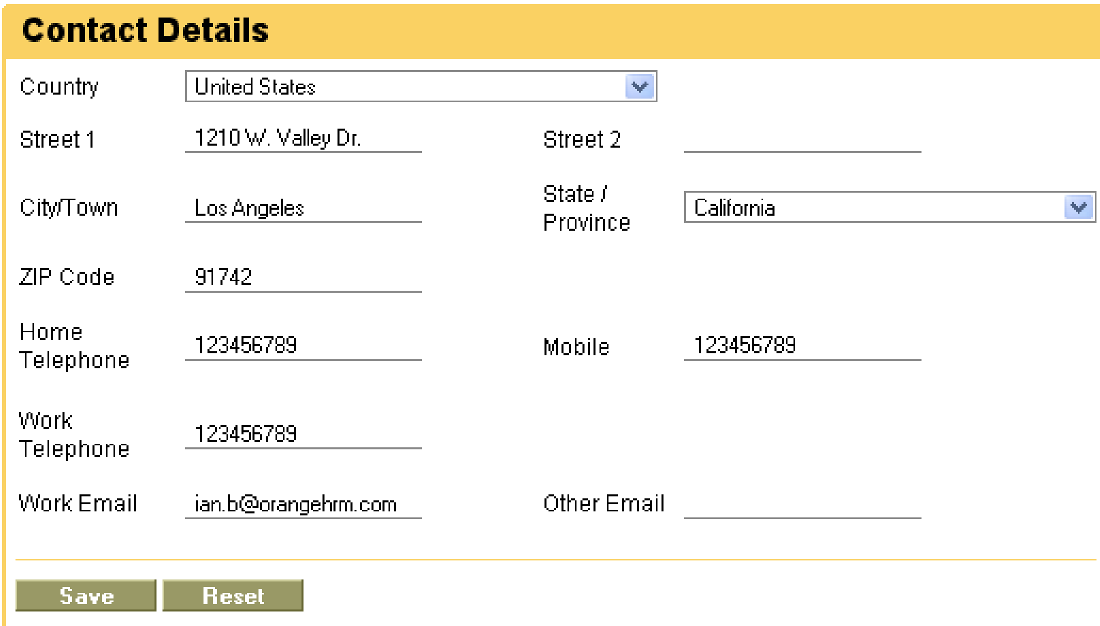


Figure 5.2.2.1

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 “Reset” to reset the details that were entered last or click “Save” to save the information. You can also add details later on.

5.2.3 Emergency Contacts

Contact details of an employee which will be needed during an emergency can be entered here. You can enter more than one emergency contact. The screen shown on figure 5.2.3.1 shows a defined contact and the information that has to be entered to create a new one.

To create a contact you need to enter;

- Name
- Relationship
- Home Telephone
- Mobile
- Work Telephone

Enter the details and press save. Saved contacts will be listed as shown on figure 5.2.3.1.

Figure 5.2.3.1

You can edit an entry by clicking on the particular "Name" of the assigned emergency contacts.

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

5.2.4 Dependants

If an employee has any dependants you can enter them here. You will see the screen shown on figure 5.2.4.1 once you select "Dependants".

Enter the details and press save for each item. Saved items will be listed as shown on figure 5.2.4.1.

Figure 5.2.4.1

You can edit an entry by clicking on the particular "Name" of the dependant.

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

5.2.5 Immigration

Immigration information can be entered here. Enter the details and click "Save" for each item. Saved items will be listed as shown on figure 5.2.5.1.

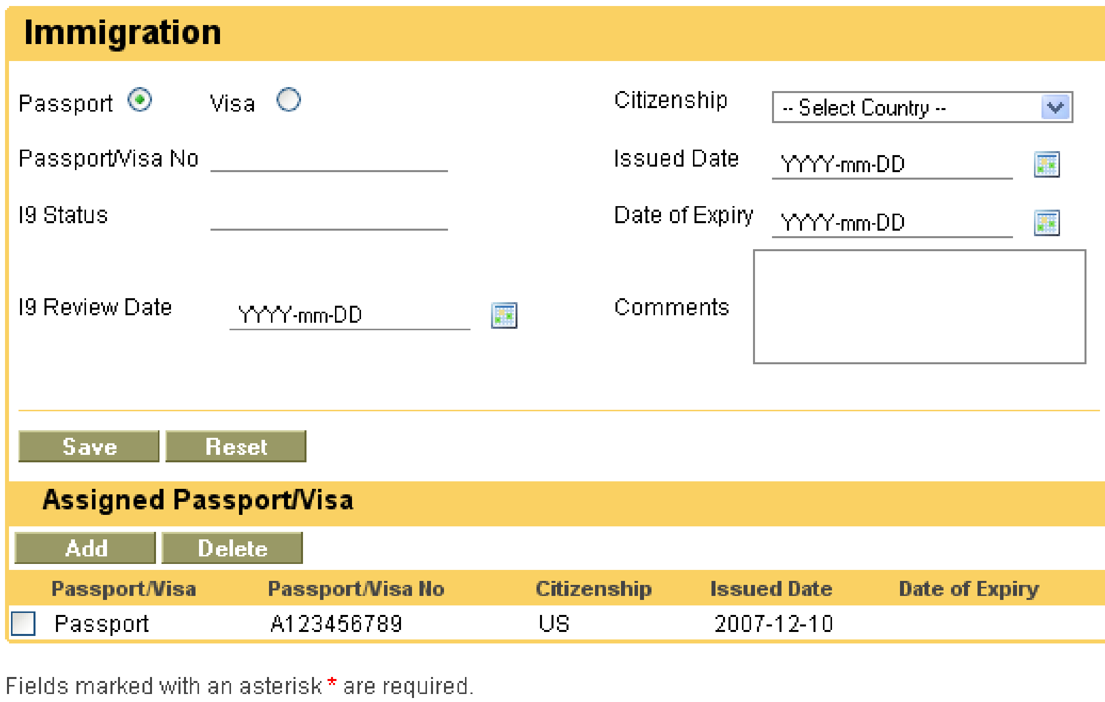


Figure 5.2.5.1

You can edit an entry by clicking on "Passport/Visa".

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

5.2.6 Photograph

A picture of the employee can be added here. Simply click “Browse” and select the file that you will upload and click “Save”.

Figure 5.2.6.1

5.2.7 Job

Describe an employee’s role in the company by defining the fields shown on the 5.2.7.1.

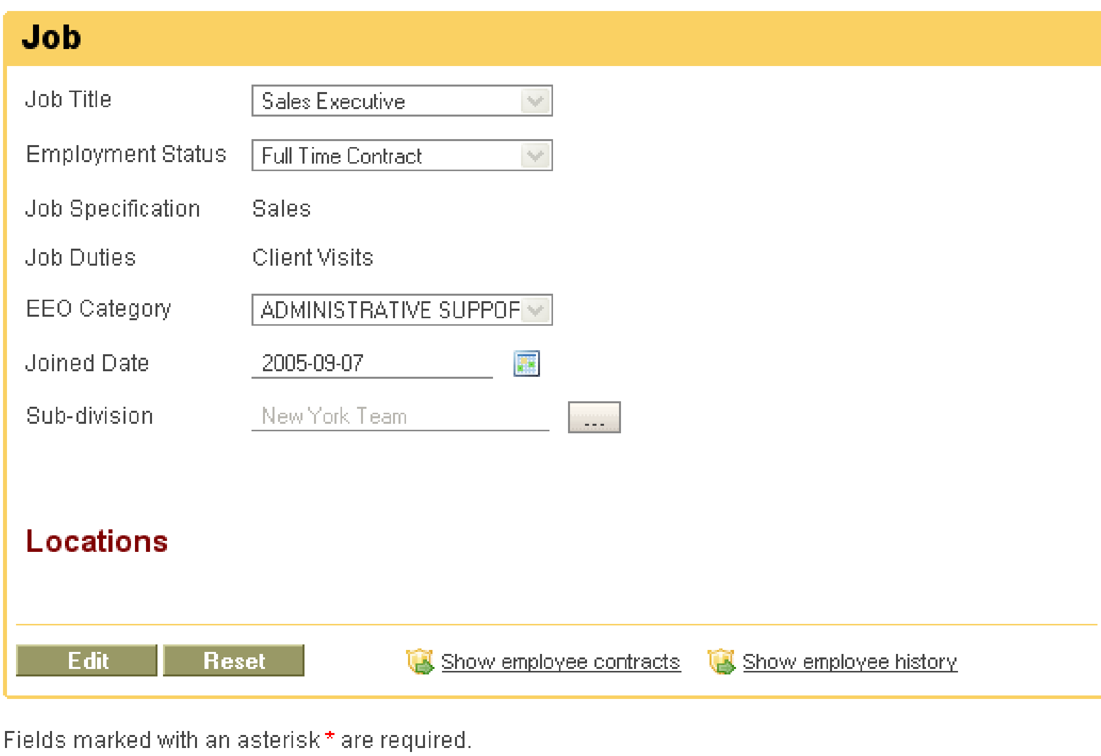


Figure 5.2.7.1

5.2.8 Salary

Information with regards to salary of an employee is entered here. You can select what pay grade he will fall into, his salary details and the pay frequency. Enter the details and click "Save" for each item. Saved items will be listed as shown on figure 5.2.8.1.

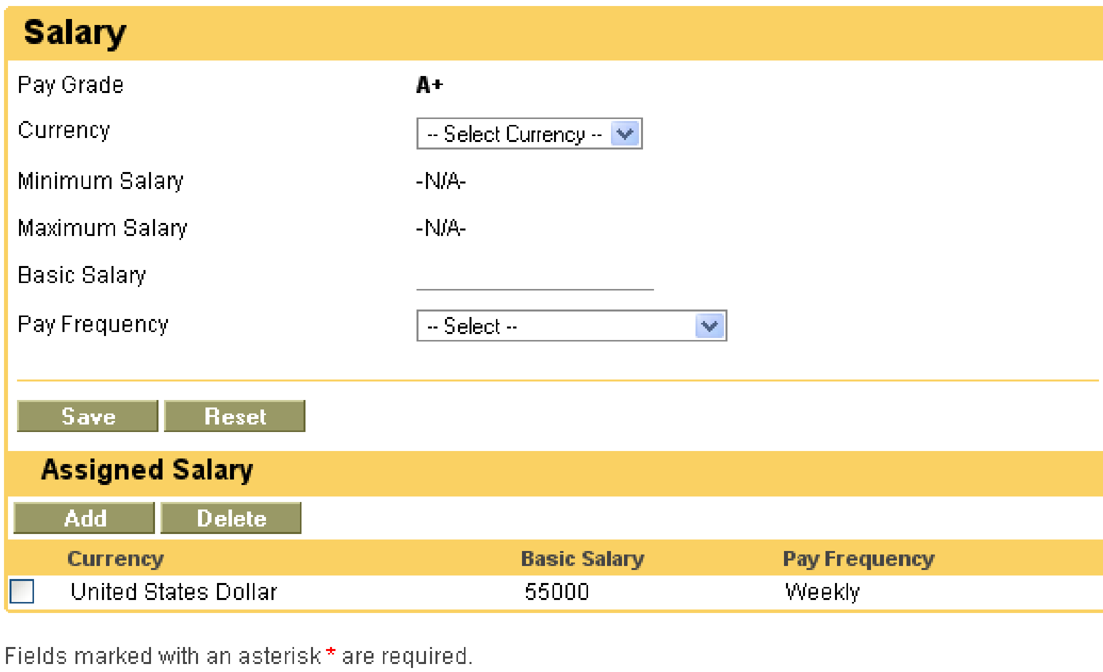


Figure 5.2.8.1

You can edit an entry by clicking on the particular "Currency".

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

5.2.9 Tax Exemptions

If an employee is suppose receive any tax exemptions those details can be defined here. Enter the relavant information and click "Save".

The tax exemption screen is shown on figure 5.2.9.1.

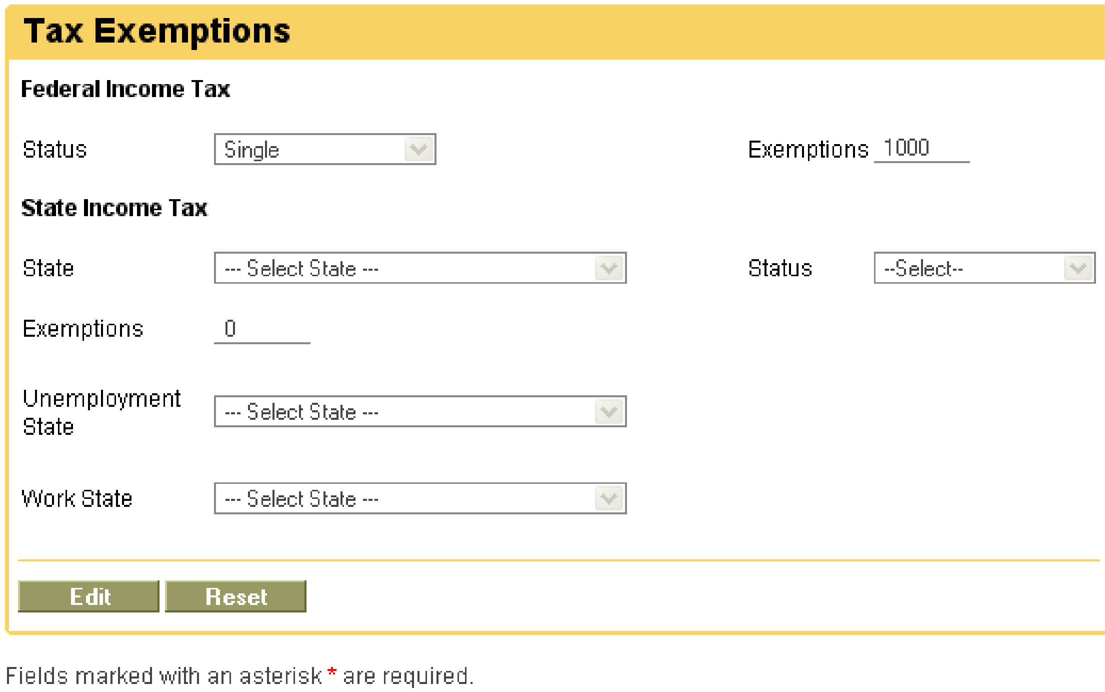


Figure 5.2.9.1

Click "Edit" to edit make changes.

5.2.10 Direct Deposit

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

Multiple accounts with different amounts can be assigned.

Define the details and click "Save" and your entry will be listed as shown on figure 5.2.10.1.

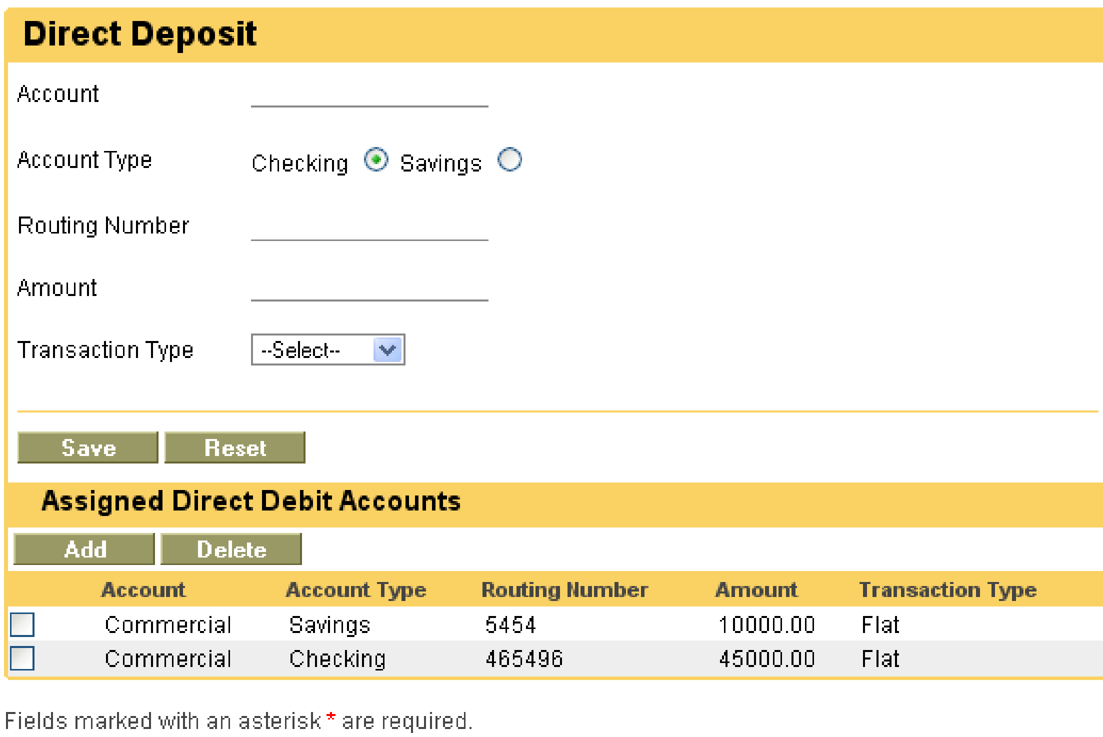


Figure 5.2.10.1

You can edit an entry by clicking on the particular "Account".

To delete an entry click on the check box next to the particular entry and press "Delete".

Multiple selections can be deleted simultaneously.

5.2.11 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.

Once the details are filled in click "Save" and the entries will be listed as shown on figure 5.2.11.1.

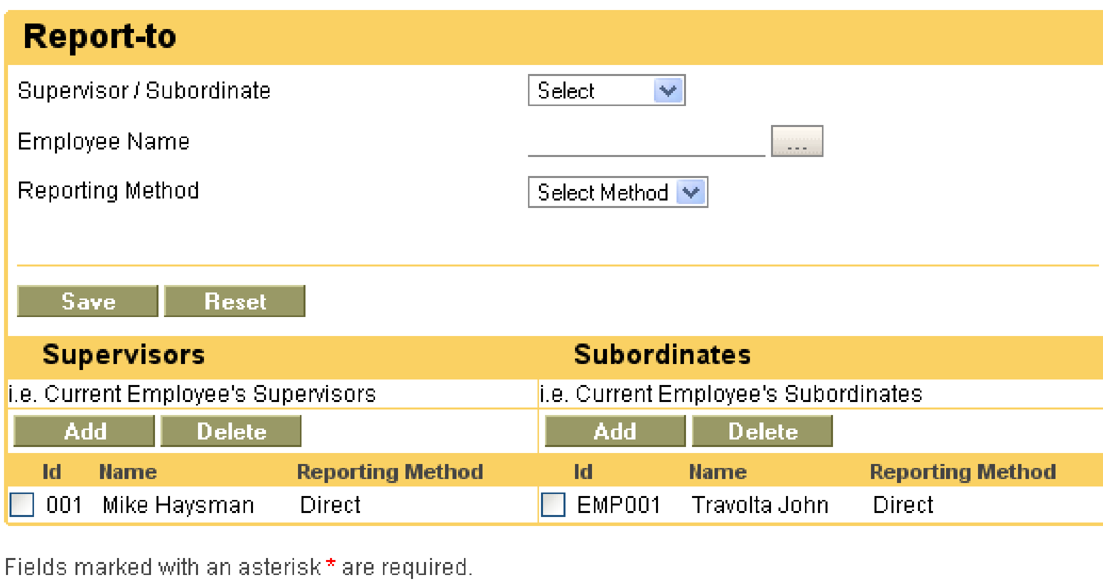


Figure 5.2.11.1

You can edit an entry by clicking on the particular supervisors or subordinates "Id".

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

5.2.12 Work Experience

Previous work experiences of an employee can be entered here. Enter the details and click "Save" and the details will be listed as shown on figure 5.2.12.1.

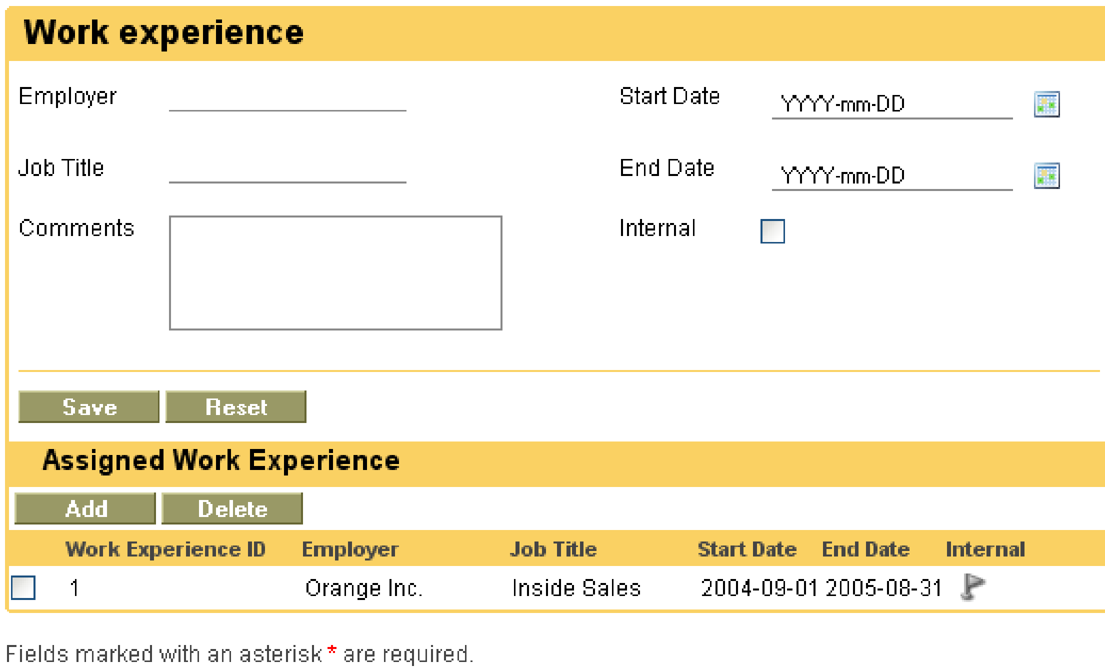


Figure 5.2.12.1

You can edit an entry by clicking on the particular "Work Experience ID".

To delete an entry click on the check box next to the particular entry and press "Delete".

Multiple selections can be deleted simultaneously.

5.2.13 Education

Education details of an employee can be entered here. Enter the details and click “Save” the qualifications will be listed as shown on figure 5.2.13.1.

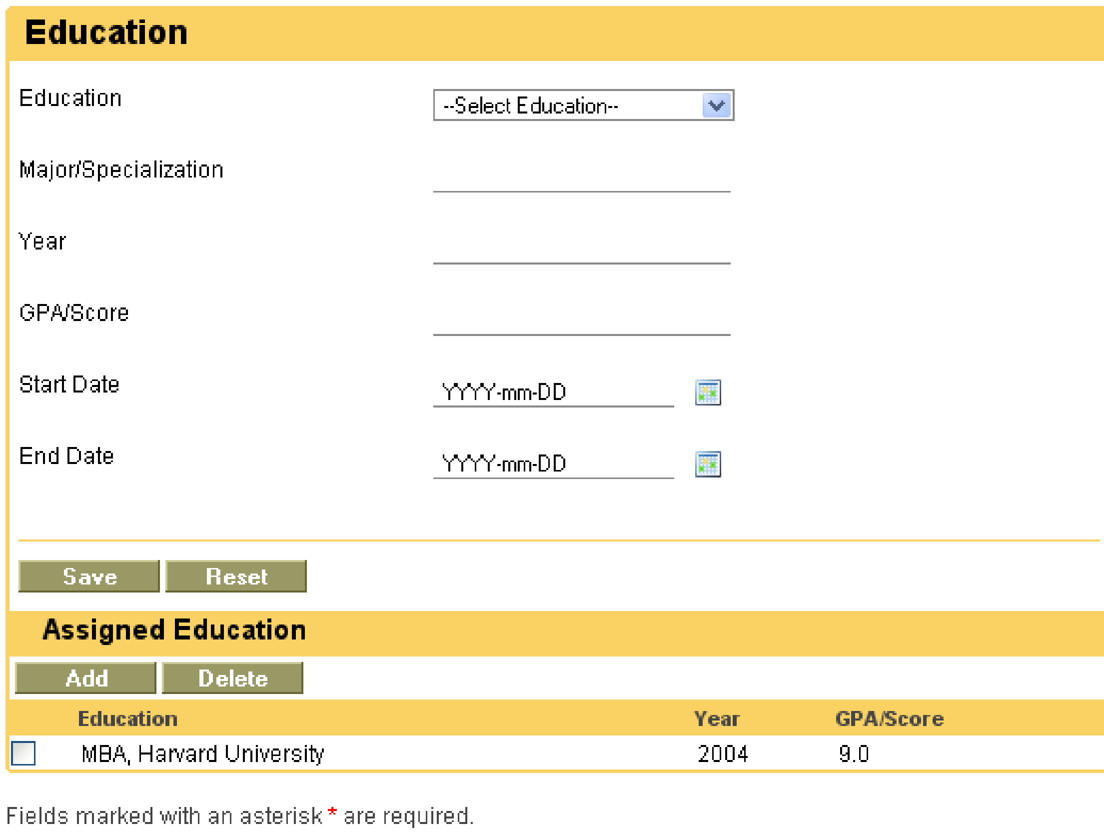


Figure 5.2.13.1

You can edit an entry by clicking on the particular “Education”.

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

5.2.14 Skills

If an employee has any special talents or skills they can be entered here. The entries that you enter will be listed as follows.

Figure 5.2.14.1

You can edit an entry by clicking on the particular “Skill”.

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

5.2.15 Languages

Here you can enter the various languages that your employees are competent in with the level of competency.

Once you have entered the details click “Save” and your entry will be listed as shown on figure 5.2.15.1.

Figure 5.2.15.1

You can edit an entry by clicking on the particular “Language”.

To delete an entry click on the check box next to the particular entry and press “Delete”.

Multiple selections can be deleted simultaneously.

5.2.16 License

Here you can enter the licenses an employee can have. Enter the details and click "Save" and the entry will be listed as shown on figure 5.2.16.1.

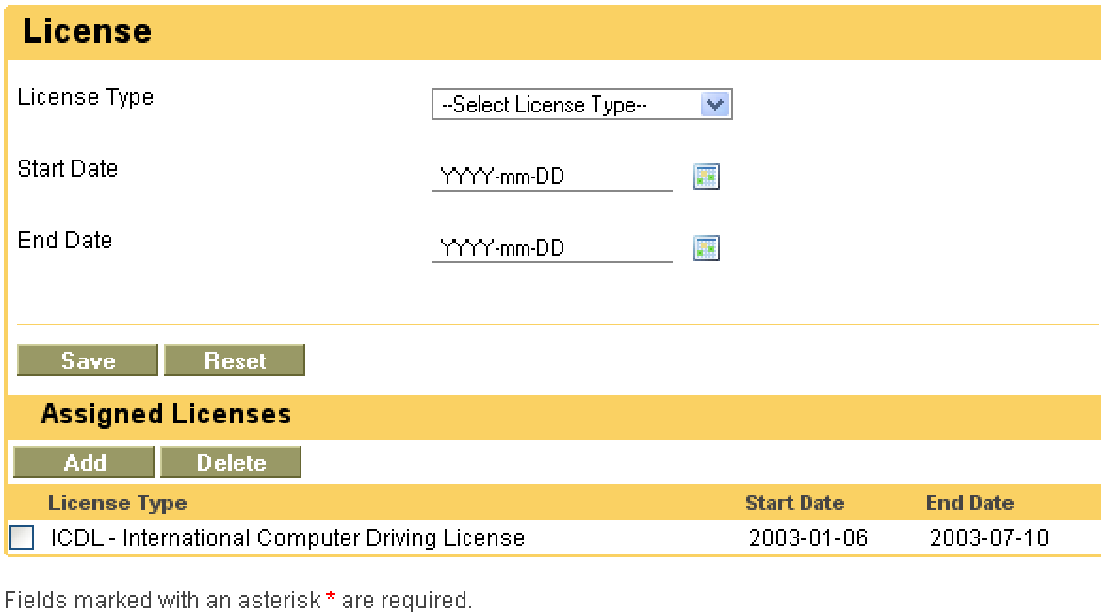


Figure 5.2.16.1

You can edit an entry by clicking on the particular "License".

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

5.2.17 Memberships

If employees are members of any committee, institute etc. those details can be entered here. Define the membership for the employee and click “Save” you will then see the entry listed as shown on figure 5.2.17.1.

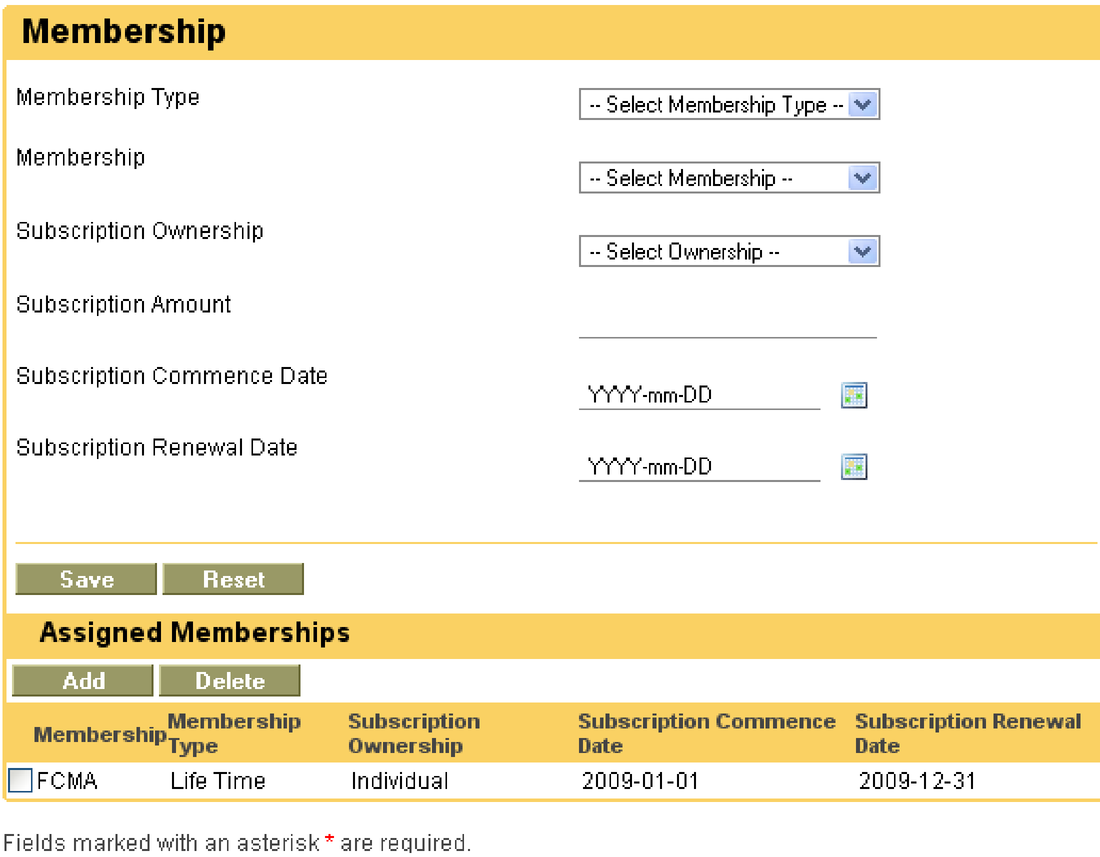


Figure 5.2.17.1

You can edit an entry by clicking on the particular “Membership”.

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

5.2.18 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 can not exceed 1 megabyte, but you can attach more than one document. To attach click "Browse" select the file and attach it.

Your attachments will listed as shown on figure 5.2.18.1.

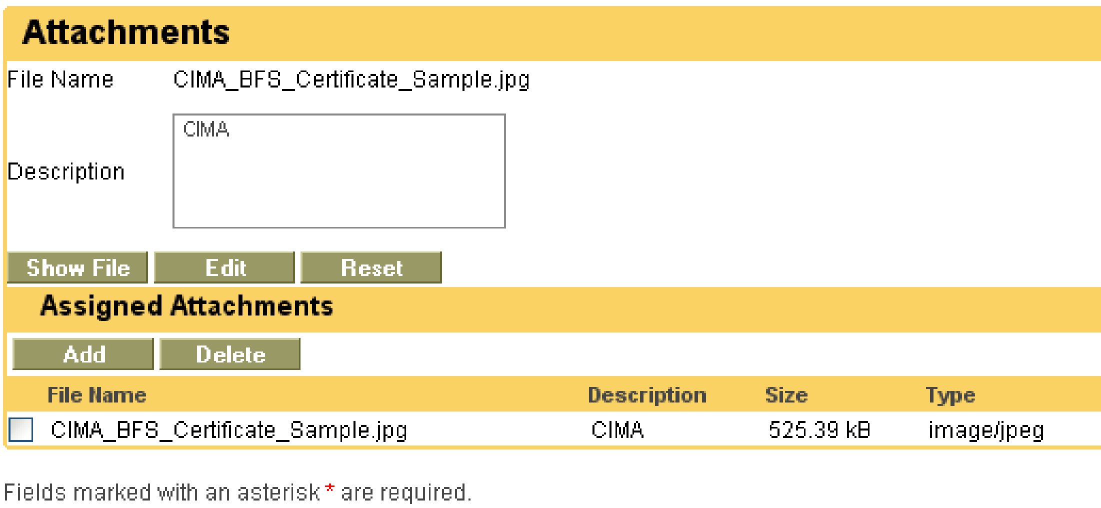


Figure 5.2.18.1

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

5.2.19 Custom

Custom features will show the custom fields that you defined in the "Admin Module". A custom field can be defined when a particular data type that you need is not available. On figure 5.2.19.1 we have shown the level of access to information through a custom field labeled "Security Clearance".

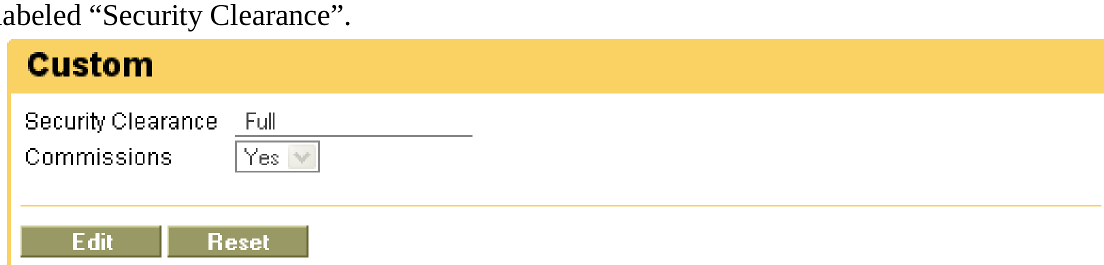


Figure 5.2.19

6.0 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
- Define Days off and Specific Holidays
- Define Leave Types
- 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

Figure 6.1

The ESS User – 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

Figure 6.2

The ESS User can:

- View the 'Personal Leave Summary'
- View the detailed leave information
- Apply for leave

Figure 6.3

6.1 Leave Summary

This feature allows you view the summary of the leave and also assign leave quota. The menu will show data depending on the user type.

The Admin will see “Employee Leave Summary” and has full rights.

ESS User who is a supervisor will see “Employee Leave Summary” (subordinates only) and the “Personal Leave Summary” and has viewing rights only.

An ESS User will see “Personal Leave Summary” and has viewing rights only.

6.1.1 Employee Leave Summary

To view the leave summary of employees select “Employee Leave Summary” you will see the screen shown on figure 6.1.1.1.

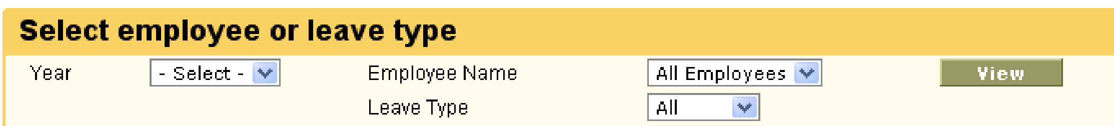
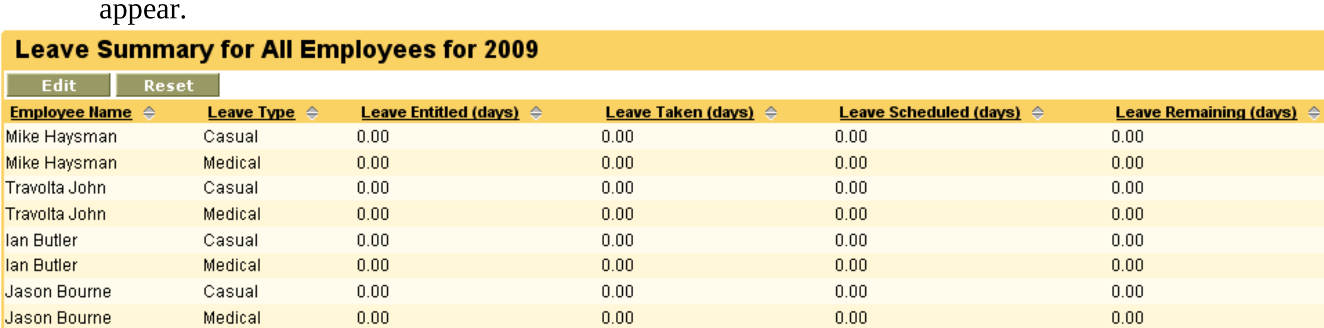


Figure 6.1.1.1

To assign leave quota or view details select the particular “Year”, a particular employee or all employees, and “Leave Type” and click “View” and the screen shown on figure 6.1.1.2 will appear.



Leave Summary for All Employees for 2009

Edit Reset

Employee Name	Leave Type	Leave Entitled (days)	Leave Taken (days)	Leave Scheduled (days)	Leave Remaining (days)
Mike Haysman	Casual	0.00	0.00	0.00	0.00
Mike Haysman	Medical	0.00	0.00	0.00	0.00
Travolta John	Casual	0.00	0.00	0.00	0.00
Travolta John	Medical	0.00	0.00	0.00	0.00
Ian Butler	Casual	0.00	0.00	0.00	0.00
Ian Butler	Medical	0.00	0.00	0.00	0.00
Jason Bourne	Casual	0.00	0.00	0.00	0.00
Jason Bourne	Medical	0.00	0.00	0.00	0.00

Figure 6.1.1.2

Please note that only the admin can add leave quota. Click “Edit” and the “Leave Entitled (days)” will become editable and you can enter that particular employee’s entitlement. Once you have entered entitlements for each “Leave Type” click “Save”.

6.1.2 Personal Leave Summary

This feature will be available to ESS Users, ESS Supervisors.

This feature shows the leave summary of the particular employee logged in.

Figure 6.1.2.1 shows an example.

Leave Summary for 2009

Leave Type	Leave Taken (days)	Leave Scheduled (days)	Leave Remaining (days)
Casual	0.00	0.00	0.00
Medical	0.00	0.00	0.00

Figure 6.1.2.1

6.2 Define Days Off

By selecting Define Days Off, the Admin can define the days off that will be applicable to the entire company and will be taken into consideration while calculating leave duration. Please note that this feature has to be defined by the Admin on any other user in the Admin User Group.

Days off have been classified into:

- Weekends
- Specific Holidays

6.2.1 Weekends

Here you can define the weekends or the days of the week that the company does not operate on. The screen shown on figure 6.2.1.1 is an example. Define the days by selecting an option from the drop down. Click “Save” once your have defined all the days. Please note that weekends have to be defined before applying or assigning leave.

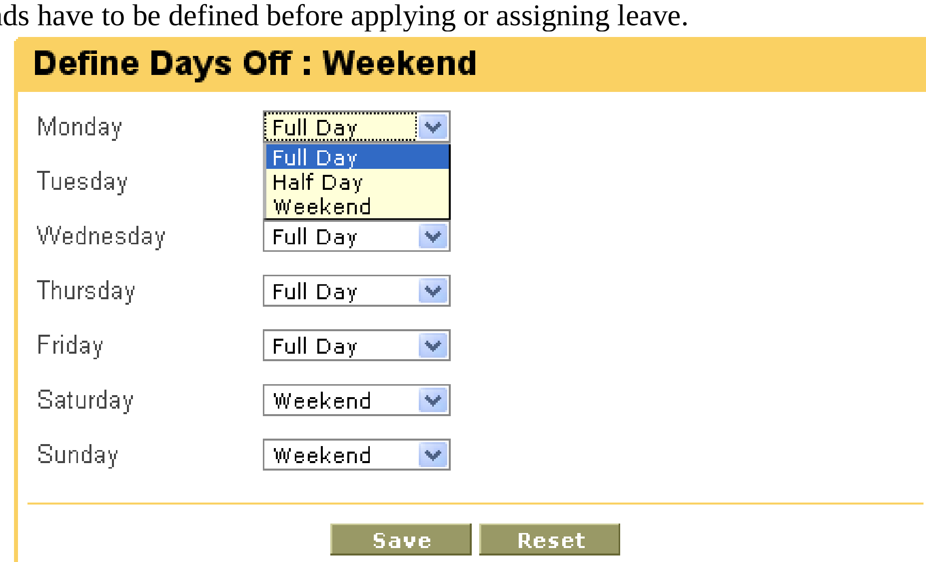


Figure 6.2.1.1

6.2.2 Specific Holidays

The admin can define “Specific Holidays”, these holidays will be applicable to the entire company and will be taken into consideration while calculating leave duration.

Click “Add” you will see the screen shown on figure 6.2.2.1.

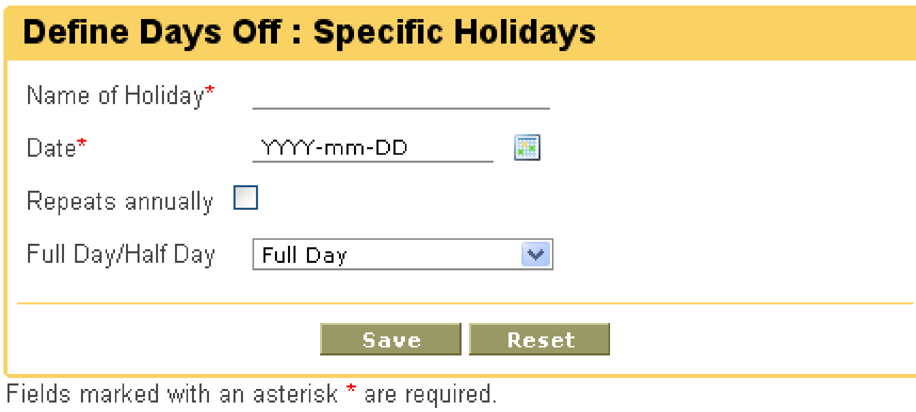
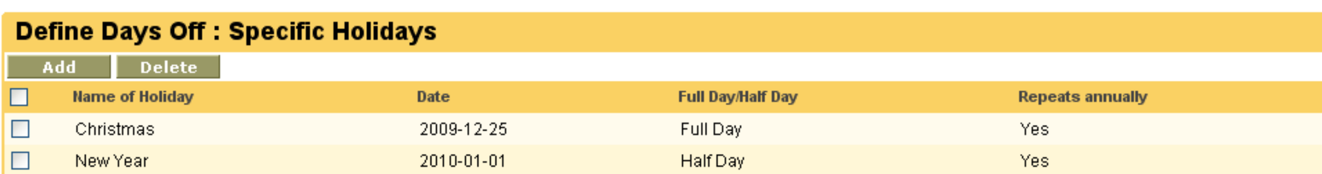


Figure 6.2.2.1

Enter the “Name of Holiday” and “Date” it will occur and checking the “Repeats Annually” will mean that the holiday will occur on the same date in the years to come. Click “Save” once you have defined a holiday. You will see the list of holidays as shown in figure 6.2.2.2



Define Days Off : Specific Holidays

Add Delete

	Name of Holiday	Date	Full Day/Half Day	Repeats annually
	Christmas	2009-12-25	Full Day	Yes
	New Year	2010-01-01	Half Day	Yes

Figure 6.2.2.2

You can edit an entry by clicking on the particular “Name of Holiday”.

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

6.3 Define 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. Click "Add" and you will see the screen shown on figure 6.3.1. Casual and medical leave are set by default.

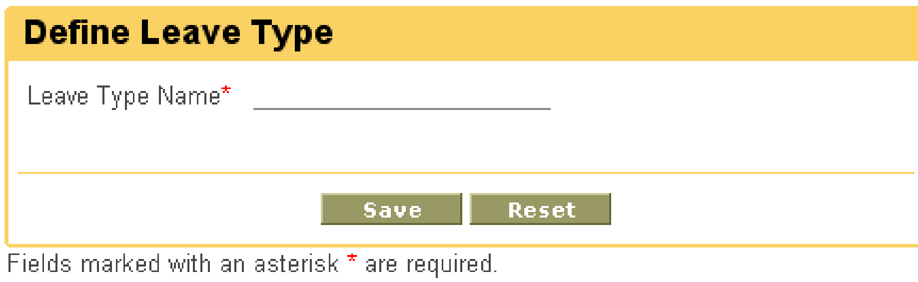


Figure 6.3.1

Enter name of the leave type you wish and click "Save". The list of defined leave will be displayed as shown on figure 6.3.2.

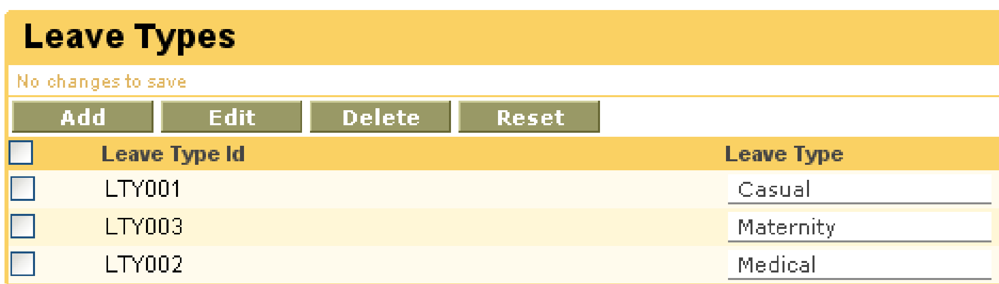


Figure 6.3.2

To edit a leave type click on "Edit" do the changes and click "Save". The "Reset" option will take back to the content which was there after the last "Save".

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

6.4 Assign Leave

The Admin and Supervisor have the right to assign leave. The ESS – Supervisor has rights to assign leave to his subordinates and admin to all employees.

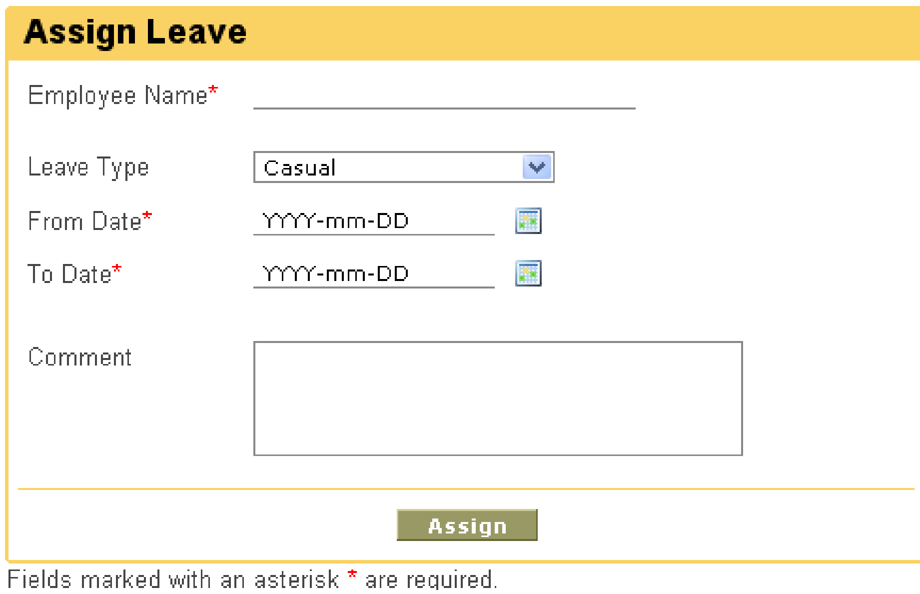


Figure 6.4.2

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 from which he is suppose to be off and you can add a comment if necessary.

Click “Assign” when you are done and the employee and the admin will be notified via e-mail.

6.5 Apply

All users except for the admin unless he is an employee can apply leave from this option. To apply a leave select “Apply” you will the see the screen shown on figure 6.5.1.

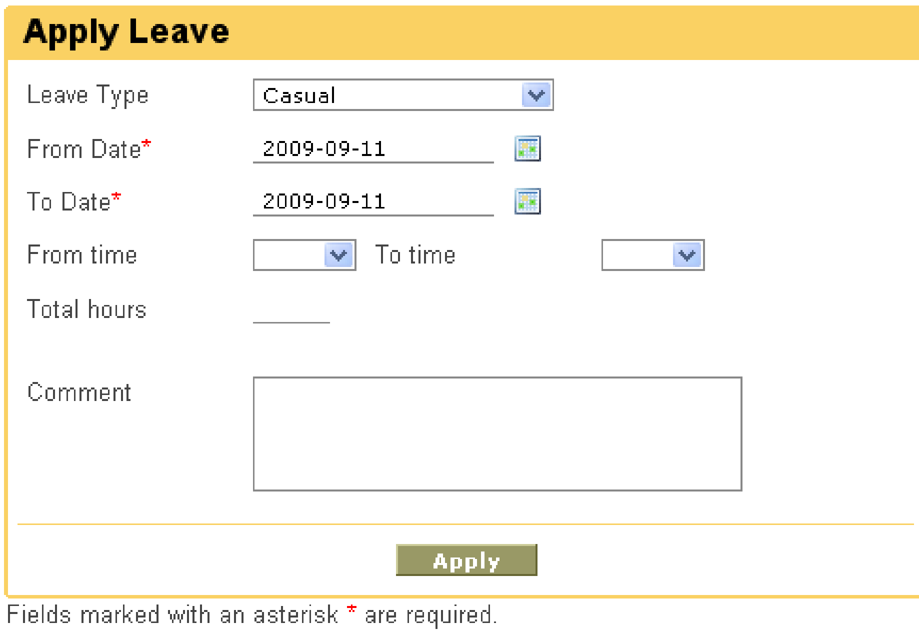


Figure 6.5.1

Select the leave type 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 just enter the number of hours and 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 Leaves”, see chapter 6.8 for more information.

6.6 Leave List

The leave list is available to the Admin and ESS – Supervisors. It will show all the information with regards to leave statuses and the following tasks can be performed;

- Reject
- Cancel
- Approve

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

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.

Once the status is changed make sure you click "Save", a mail will be then sent to the employee and he can be the status of his leave application.

Figure 6.6.1 shows a set of leave and the status of the leave.

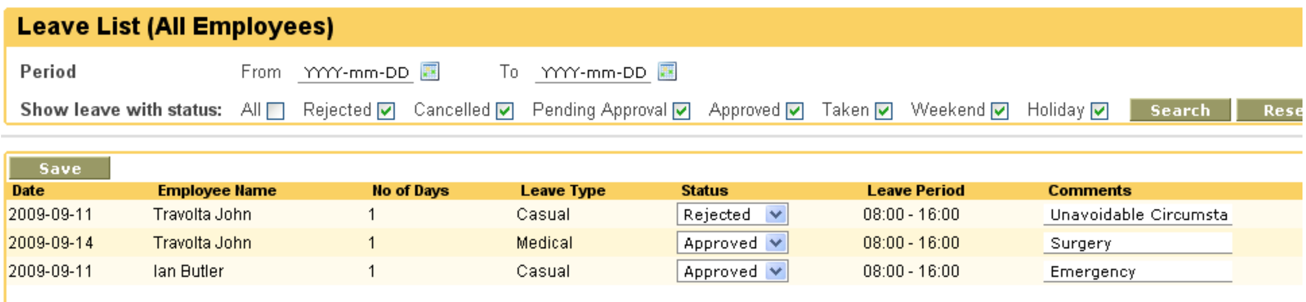


Figure 6.6.1

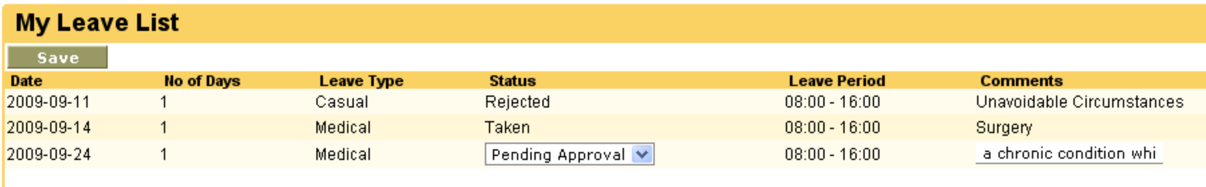
You can view leaves between specific periods by specifying the "From" and "To" dates.

You can also view the complete leave list with all the status or any combination of the following;

- Rejected
- Cancelled
- Pending Approval
- Approved
- Taken
- Weekend
- Holiday

6.7 My Leave

This menu item is available for ESS Users and ESS Supervisors. Personal leave details can be viewed here.



My Leave List

Save

Date	No of Days	Leave Type	Status	Leave Period	Comments
2009-09-11	1	Casual	Rejected	08:00 - 16:00	Unavoidable Circumstances
2009-09-14	1	Medical	Taken	08:00 - 16:00	Surgery
2009-09-24	1	Medical	Pending Approval	08:00 - 16:00	a chronic condition whi

Figure 6.7.1

An employee can choose to cancel a pending approval leave or an approved leave. He cannot make any changes to any other leave status.
He can view complete details of leaves by clicking on the “Date”.
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 4.8 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.

7.0 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, submitted by their subordinates. While attendance is tracked through punch in/out employees can specify the time spent of projects assigned to them.

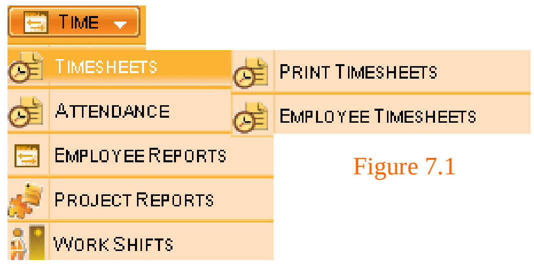


Figure 7.1

Depending on each user the functions vary;

The Admin can:

- ➢ Print Timesheets
- ➢ View / Edit / Approve / Reject Employee Timesheets
- ➢ View any employee's time reports
- ➢ View project reports for any project undertaken by the company
- ➢ Define a work shift for an individual/group of employees

Figure 7.2

The ESS – Supervisor can:

- ➢ Enter, modify and submit personal timesheets
- ➢ View / Edit / Approve / Reject timesheets of his subordinates
- ➢ Enter punch in/out time
- ➢ Enter time events spent on the project activities
- ➢ View his subordinates' employee time

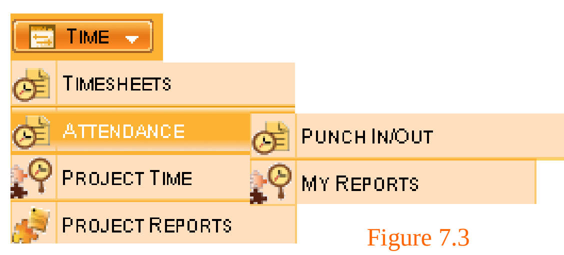


Figure 7.3

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

7.1 Timesheets

This feature functions in different ways depending on who the user is.

The Admin will be able to print and view timesheets of employees while a Supervisor can also do the same and in addition can enter his timesheet details, but a normal ESS User can only enter his timesheet details.

7.1.1 Entering and Submitting a Timesheet

When an ESS User clicks on "Timesheets" or an ESS – Supervisor clicks on "My Time Sheets" the screen shown on figure 7.1.2.1 will appear. This option is not available to the Admin. Please note the starting day of the week ahs to be define before enetering details on time sheets.

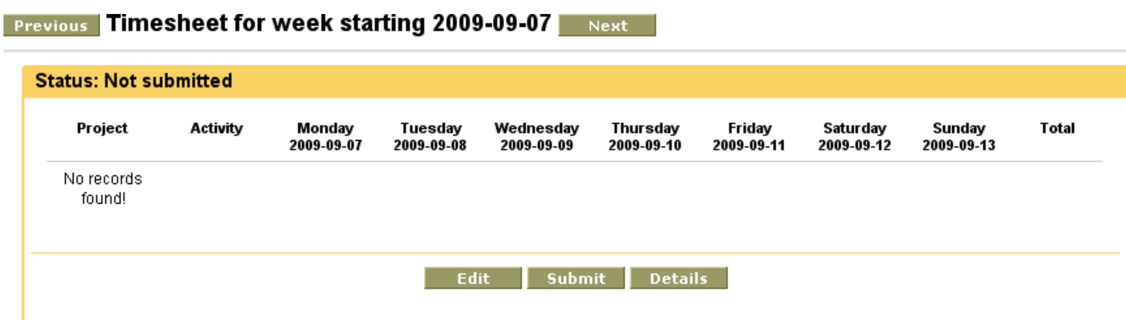


Figure 7.1.2.1

To enter details click "Edit" and enter the time spent on each project activity. You can add or remove rows and define times for various projects and activities at any time of the week. Each time click "Save". Once times have been defined for the whole week then click "Save"

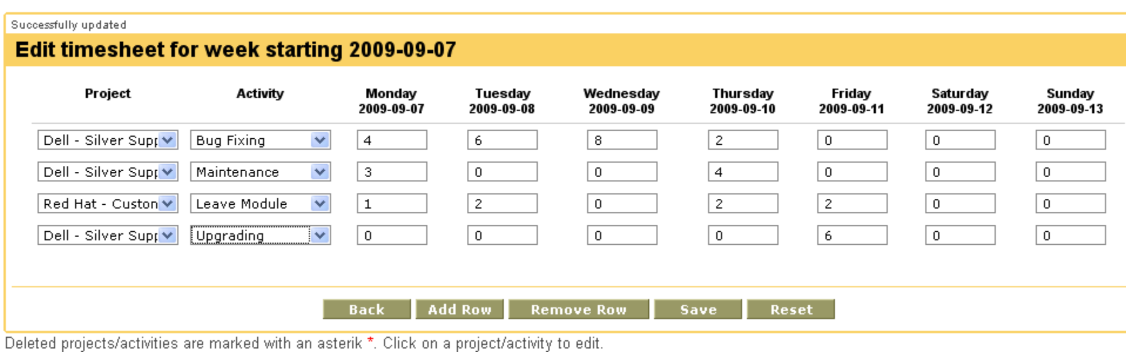


Figure 7.1.2.2

After saving the information click “Back” and go to the view screen and you will the details as shown in figure 7.1.2.3.You can submit the time sheet to your superior for approval, to do this click “Submit”, click “Edit” to make changes or click “Details” to see a detailed view.

Status: Not submitted

Project	Activity	Monday 2009-09-07	Tuesday 2009-09-08	Wednesday 2009-09-09	Thursday 2009-09-10	Friday 2009-09-11	Saturday 2009-09-12	Sunday 2009-09-13	Total
Dell - Silver Support	Bug Fixing	4	6	8	2	0	0	0	20
Dell - Silver Support	Maintenance	3	0	0	4	0	0	0	7
Dell - Silver Support	Upgrading	0	0	0	0	6	0	0	6
Red Hat - Customization	Leave Module	1	2	0	2	2	0	0	7
Total		8	8	8	8	8	0	0	40

Edit Submit Details

Figure 7.1.2.3

7.1.2. Approving Employee Timesheets

When an employee submits a time sheet it will be sent to his supervisor. The supervisor will see the submitted time sheets as shown in figure 7.1.2.1.

Select Employee

Employee Name Start Typing for Hints... View

Submitted timesheets pending supervisor approval

Employee Name	Timesheet period	
Travolta John	Week starting 2009-08-24	View
Travolta John	Week starting 2009-08-10	View

Figure 7.1.2.1

Click “View” to see the details of the timesheet.

Status: Submitted

Project	Activity	Monday 2009-08-10	Tuesday 2009-08-11	Wednesday 2009-08-12	Thursday 2009-08-13	Friday 2009-08-14	Saturday 2009-08-15	Sunday 2009-08-16	Total
Dell - Silver Support	Bug Fixing	8	8	8	8	8	0	0	40
Total		8	8	8	8	8	0	0	40

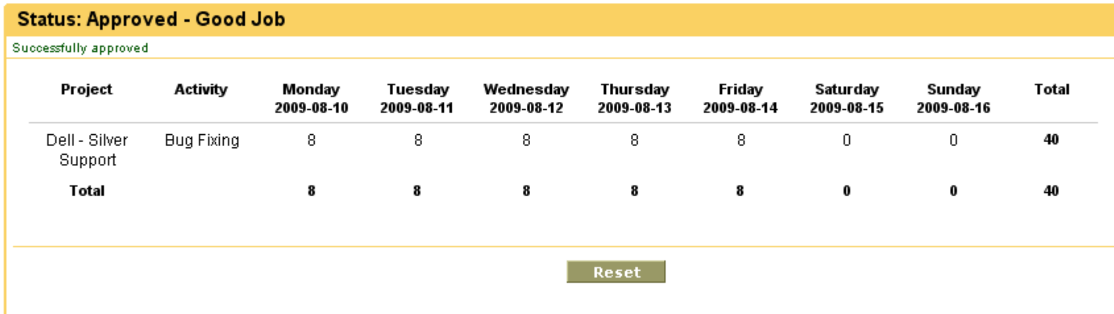
Edit Details

Comment Approve Reject

Figure 7.1.2.2

The supervisor can approve or reject a timesheet by entering a comment.

Once approved or rejected the particular employee will also be updated with the status.



Status: Approved - Good Job

Successfully approved

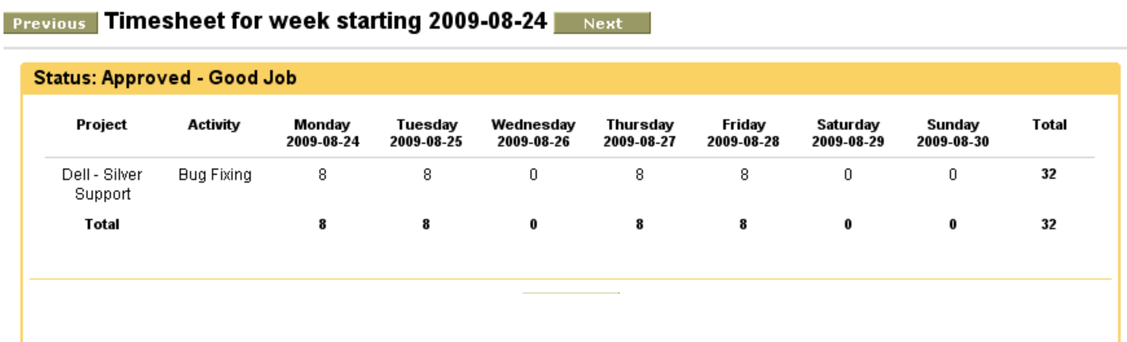
Project	Activity	Monday 2009-08-10	Tuesday 2009-08-11	Wednesday 2009-08-12	Thursday 2009-08-13	Friday 2009-08-14	Saturday 2009-08-15	Sunday 2009-08-16	Total
Dell - Silver Support	Bug Fixing	8	8	8	8	8	0	0	40
Total		8	8	8	8	8	0	0	40

Reset

Figure 7.1.2.3

An approved or rejected timesheet can be withdrawn to change the status by clicking “Reset”.

The employee will see an approved or rejected timesheet as shown on figure 7.1.2.4.



Previous Timesheet for week starting 2009-08-24 Next

Status: Approved - Good Job

Project	Activity	Monday 2009-08-24	Tuesday 2009-08-25	Wednesday 2009-08-26	Thursday 2009-08-27	Friday 2009-08-28	Saturday 2009-08-29	Sunday 2009-08-30	Total
Dell - Silver Support	Bug Fixing	8	8	0	8	8	0	0	32
Total		8	8	0	8	8	0	0	32

Figure 7.1.2.4

The employee can move between timesheets by clicking “Previous” and “Next”.

The Admin can view timesheets of any employee, but cannot approve or reject them; a user who is the Admin and a Supervisor can approve/reject timesheets of his subordinates.

7.1.3 Print Timesheets

The administrators and supervisors can print time sheets of employees. Admin can print any employee’s time sheet whereas the supervisor can print timesheets of his subordinates.

To print timesheets go to “Print Timesheets” and you will see the screen shown on figure 7.1.3.1.

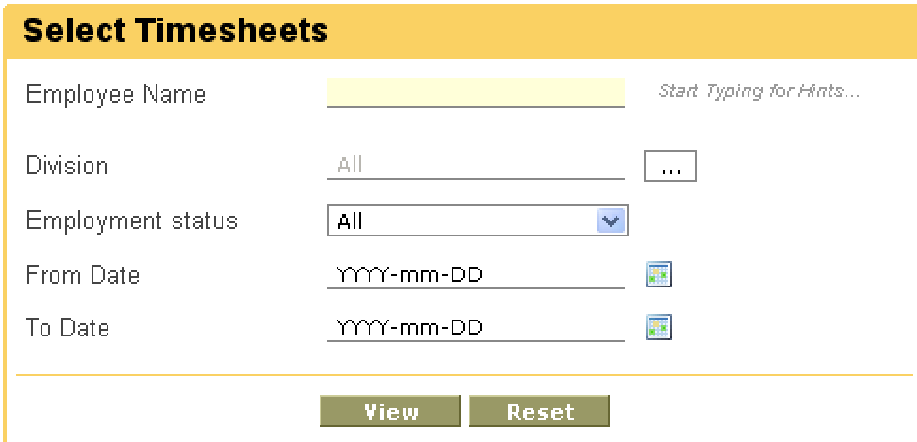
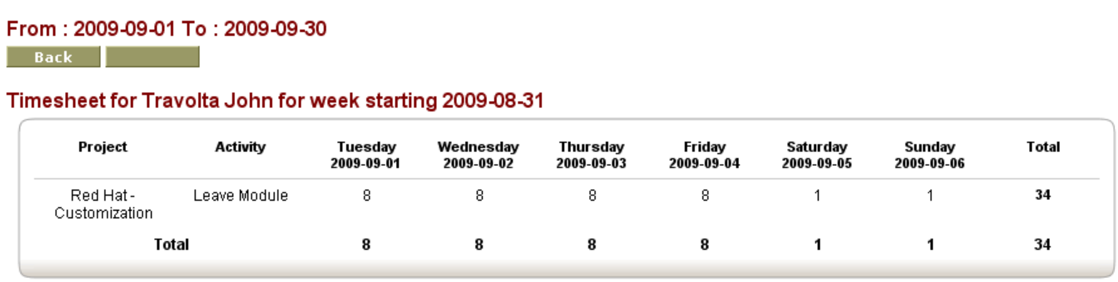


Figure 7.1.3.1

Enter a employees name or select “All” and select the relevant “Divisions”, “Employment Status”, and the period “From” and “To” and click “View” and you will see the screen shown on figure 7.1.3.2.



Project	Activity	Tuesday 2009-09-01	Wednesday 2009-09-02	Thursday 2009-09-03	Friday 2009-09-04	Saturday 2009-09-05	Sunday 2009-09-06	Total
Red Hat - Customization	Leave Module	8	8	8	8	1	1	34
Total		8	8	8	8	1	1	34

Figure 7.1.3.2

Click “Print” if you wish to print the timesheet or click “Back” to go back to the previous page.

7.2 Attendance

All attendance records are maintained and recorded under attendance. Depending on the user the attendance functions vary.

The Admin can:

- Generate attendance reports for all the employees
- Configure user rights with regards to attendance

The ESS – Supervisor can:

- Punch In/Out
- View personal reports
- View employee reports

The ESS User can:

- Punch In/Out
- View personal time reports.

7.2.1 Configuration

The admin can select what privileges the employees and supervisors will have on the punch in/out and attendance.

The screen shown on figure 7.2.1.1 shows the “Attendance Configuration”, to give rights to a particular item click on the check box to select it and click “Save”.

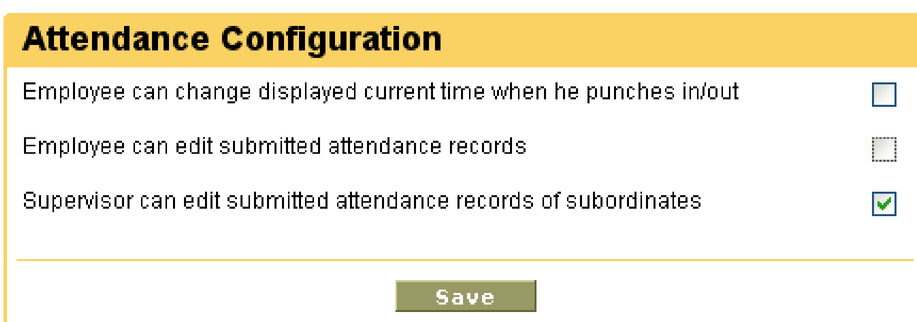


Figure 7.2.3.1

7.2.2 Punch In/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 time, user should select Punch In/Out menu item under the Time Module. The screen, shown in the figure 7.2.2.1 will be displayed.

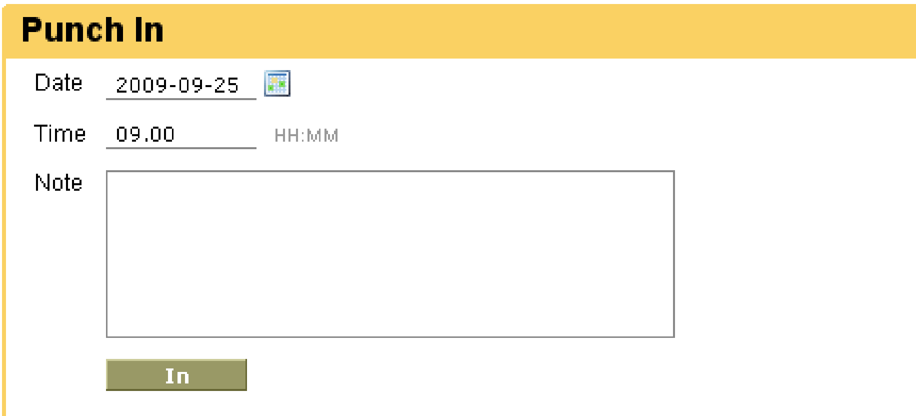


Figure 7.2.2.1

7.2.3 Employee Reports

Here the Admin and ESS – Supervisor can view and edit attendance reports of employees. To view employee reports select “Employee Reports” from “Attendance” and the screen shown on figure 7.2.3.1 will appear.

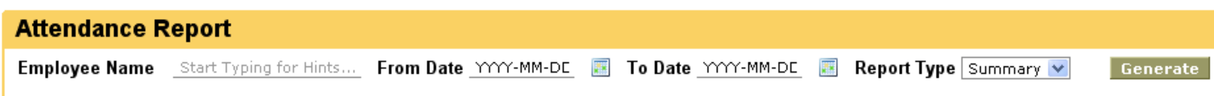


Figure 7.2.3.1

Select the employee and the “From Date” and “To Date” and the type of report you wish to view, and then click “Generate”.

Please note that edits can be only made on a detail report.

In Date	In Time	In Note	Out Date	Out Time	Out Note	Delete
2009-09-17	10:54		2009-09-24	15:52		

Save

Figure 7.2.3.2

Click “Save” if you make any changes.

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

7.2.4 My Reports

Both an ESS – Supervisor and a ESS User can view detailed or summarized attendance reports and can edit submitted reports if the admin has given them rights to do so. The screen shown on figure 7.2.4.1 is a sample of a personal employee report.

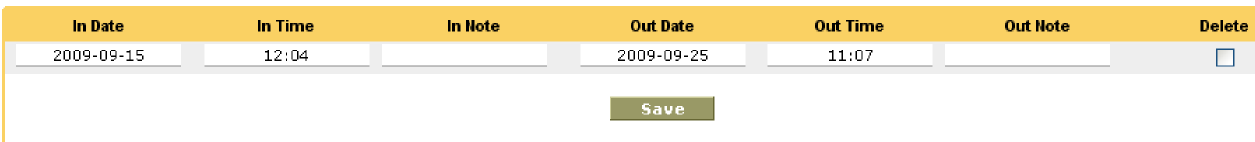


Figure 7.2.4.1

7.3 Employee Reports

These reports are available only to the Admin. Here the Admin can track the time spent by employees on particular activities. To view an employee report select “Employee Reports” from the Time Module and the screen shown on figure 7.3.1 will appear.

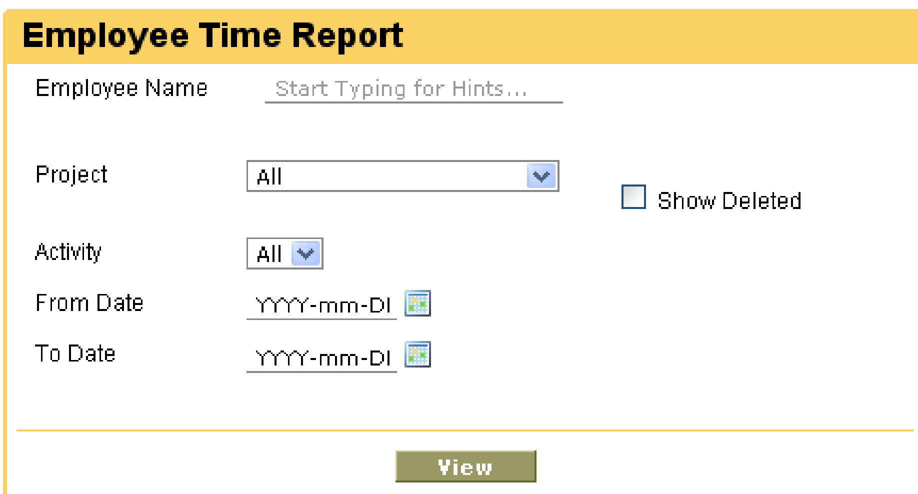


Figure 7.3.1

The screen shown on figure 7.3.1.2 shows a sample report.

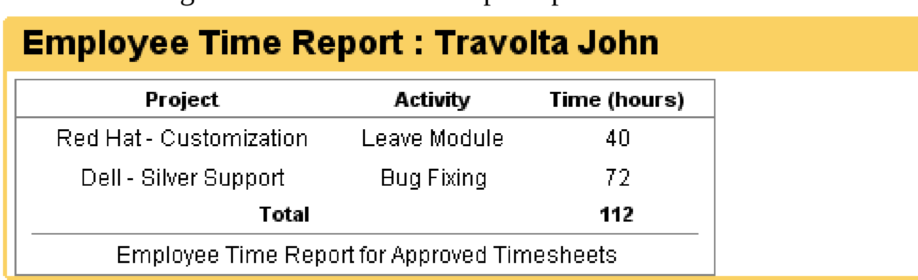


Figure 7.3.1.2

7.4 Project Reports

This feature is available for the Admin, ESS – Supervisors and ESS Users. The Admin can view can reports for all projects and the ESS – Supervisors and ESS Users can view reports on projects administered by them or projects assigned to them. The screen shown on figure 7.4.1 is a report generated by the Admin.

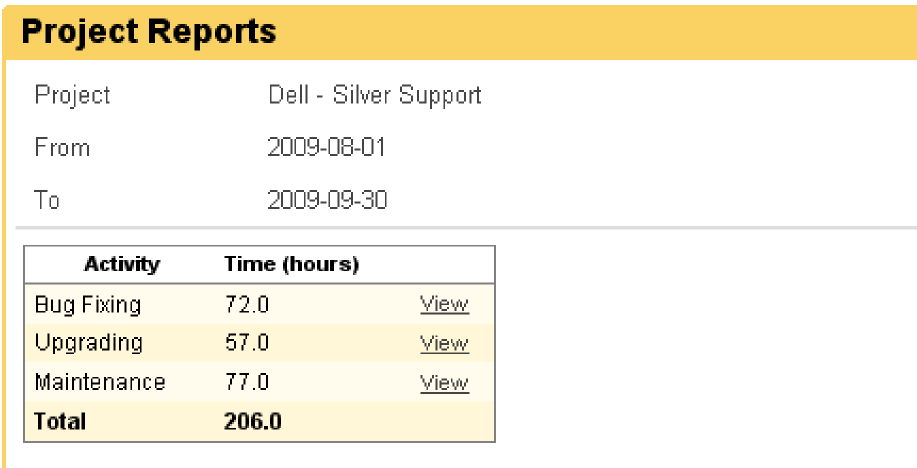


Figure 7.4.1

Click “View” to see details on a particular activity. A detailed view of an activity is shown on figure 7.4.2.

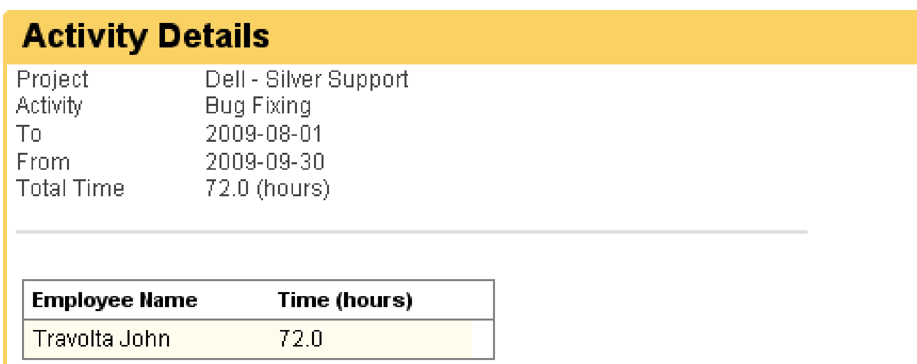


Figure 7.4.2

7.5 Work Shifts

The work shifts for individual or the group of employees can be defined only by the Admin. This can be done by selecting the “Work Shift” from the Time Module. The screen will be shown on figure 7.5.1 will appear.

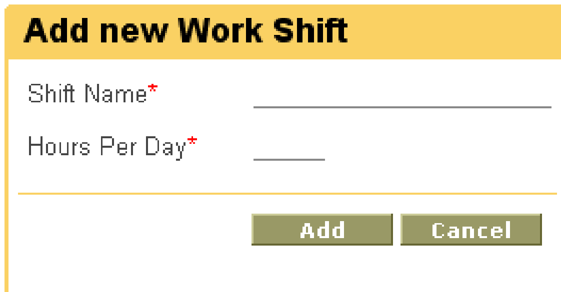


Figure 7.5.1

Enter a name for the shift and how many hours the shift will last and then click “Add”. You will then see the shift you added listed as shown in figure 7.5.2.

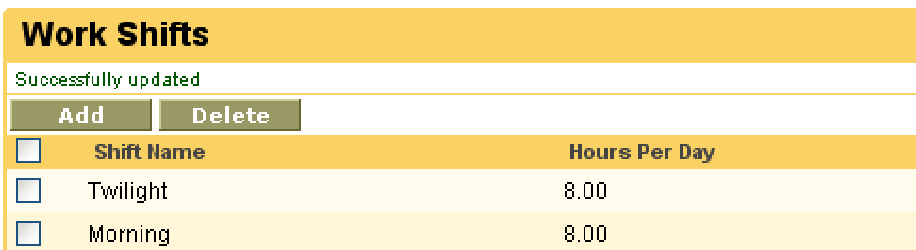


Figure 7.5.2

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

To add employees to a shift click on the particular shift and you will see the screen shown of figure 7.5.3.

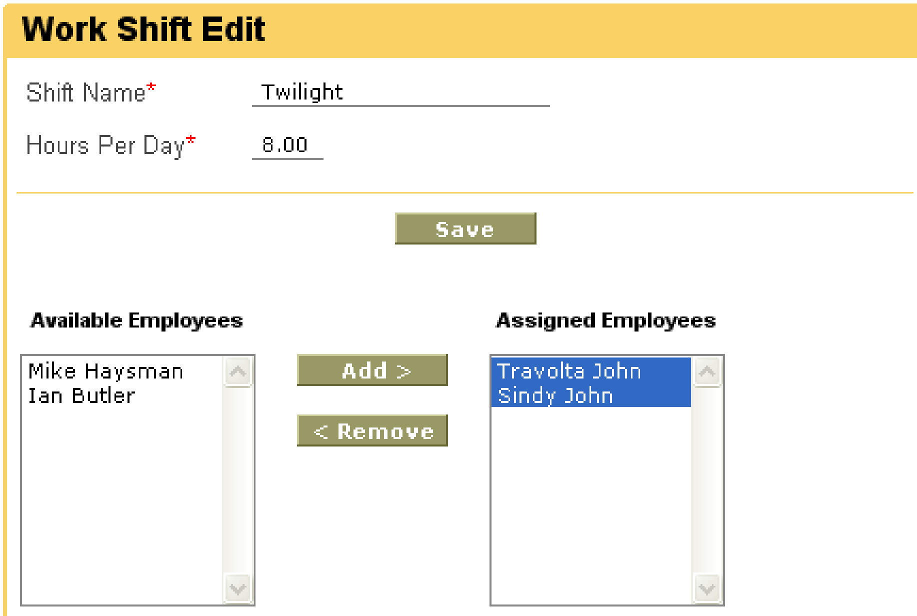


Figure 7.5.3

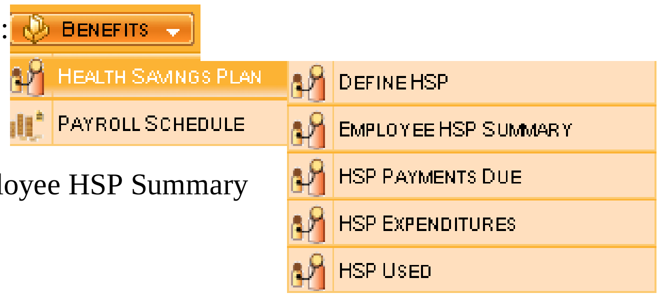
To add an employee to the shift, click on the employee's name or for multiple selections hold "Ctrl" while selecting and then press "Add".

Vice versa you can remove employees from the shift by clicking "Remove".

Click "Save" once you are done.

8.0 Benefits Module

This module allows the Admin to define Health Savings Plans and define the Payroll Schedule for the company. The Benefit Module is also available for the ESS Users but with limited options. On the Benefits Module:



The Admin can:

- Define a health savings plan
- View, Resume and Halt the employee HSP Summary
- View HSP payments due
- View HSP expenditures
- View HSP used

The ESS User can:

- View personal HSP expenditure
- Request HSP
- View personal HSP summary

8.1 Health Savings Plan

The Admin can define a health savings plan and operate it via this feature. The Health Savings Plan menu consists the following items:

- Define HSP
- Employee HSP Summary
- HSP Payments Due
- HSP Expenditures
- HSP Used

8.1.1 Define HSP

Here the admin can choose the type of HSP Plan the company wishes to implement. The abbreviations used are as follows:

- HSA – Health Savings Account
- HRA – Health Reimbursement Account
- FSA – Flexible Spending Account

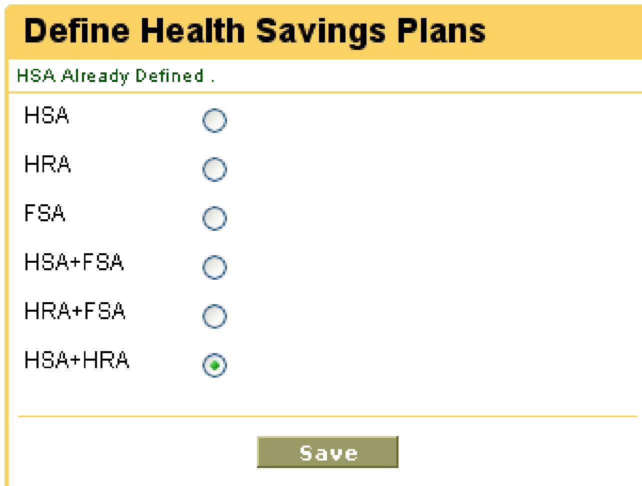


Figure 8.1.1

Select the HSP and click “Save”.

8.1.2 Request HSP

This option is available only to ESS Users. An ESS User can request for a HSP, to request select “Request HSP” from the Benefits Module, you will see the following screen shown on figure 8.1.2.1.

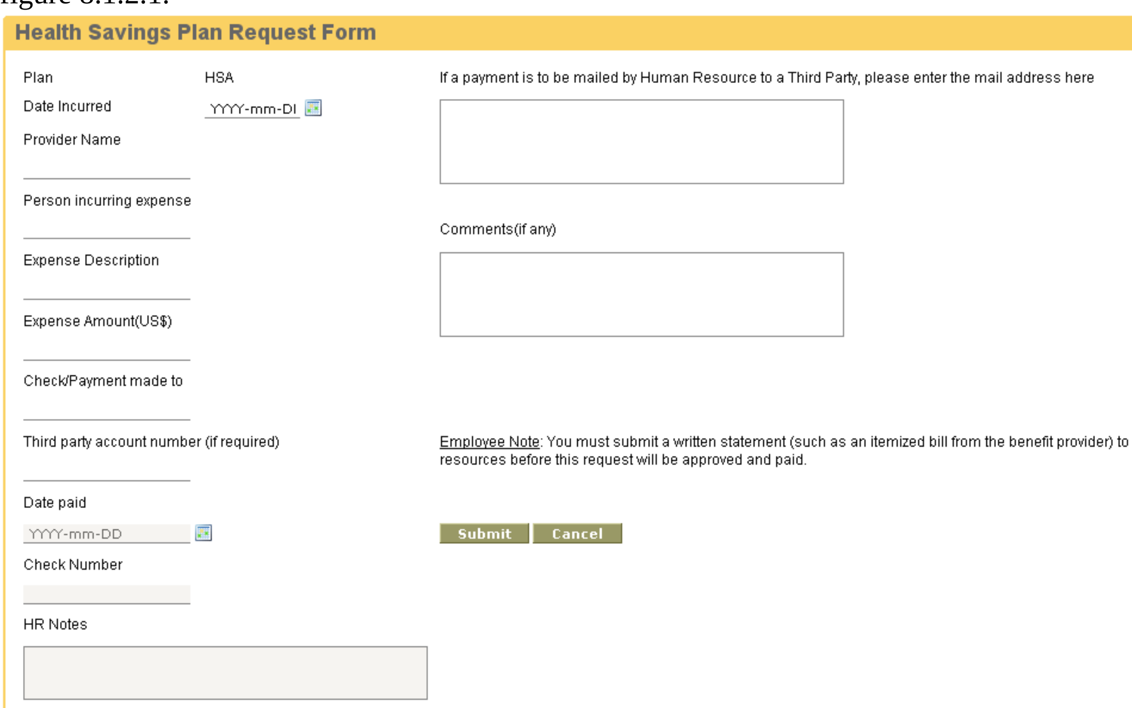


Figure 8.1.2.1

Enter the details and click "Submit", the admin will then be notified via an email about your request.

8.1.3 Employee HSP Summary

The Admin can define the contributions that have to be made for the plan, the Annual Limit, Employer contribution, Employee contribution, and the Total Accrued and Used will be calculated automatically. The Admin can also halt a plan by clicking "Halt" at the end of each entry. The Admin can view the HSP used list of a particular employee by clicking on the employee's name. Figure 8.1.3.1 shows an example of an "Employee HSP Summary" and figure 8.1.3.2 shows an example of HSP used list.

The Admin can extract the details on to PDF by clicking on "Save as PDF".

Employee Health Savings Plan Summary- 2009

Employee | Start Typing for Hints... | 2009 | Search | Edit | Reset | Save as PDF

Employee	Plan	Status	Annual Limit ($)	Contribution per pay-day: Employer ($)	Contribution per pay-day: Employee ($)	Total Accrued ($)	Total Used ($)	
Mike Haysman	HSA	Active	100.00	10.00	10.00	20.00	10.00	Halt
Travolta John	HSA	Active	100.00	10.00	10.00	20.00	0.00	Halt
Sarah Butler	HSA	Active	0.00	0.00	0.00	0.00	0.00	Halt

Figure 8.1.3.1

Health Savings Plan Used List : Mike Haysman

Back | Save As PDF

Paid?	Date Incurred	Name Of Provider	Expense Description	Incurred For?	Cost (US$)
Yes	2009-09-22	HSA Provider	Health Savings Description	Mike Haysman	10.00
No	2009-09-16	HSA Provider	Medical Claim	Mike Haysman	10.00
No	2009-09-10	HSA Provider	Medical Claim	Mike Haysmani	10.00
				Total Used (YTD)	**30.00**

Figure 8.1.3.2

8.1.4 HSP Payments Due

The payments which are due by an employee will be reflected here. Figure 8.1.4.1 shows an example with a list of payments that are due.

Health Savings Plan Payments Due

Save As PDF

Paid?	Date Incurred	Name Of Provider	Expense Description	Incurred For?	Cost (US$)
No	2009-09-16	HSA Provider	Medical Claim	Mike Haysman	10.00
No	2009-09-10	HSA Provider	Medical Claim	Mike Haysmani	10.00

Figure 8.1.4.1

8.1.5 HSP Expenditures

This reflects the expenditures or claims that were made by employees on his HSP; The Admin can view the expenditure of all the employees while an ESS User can only view his personal HSP expenditure.

The Admin can view a HSP Used List by selecting HSP Expenditures from the HSP menu and then he will see the screen shown on figure 8.1.5.1

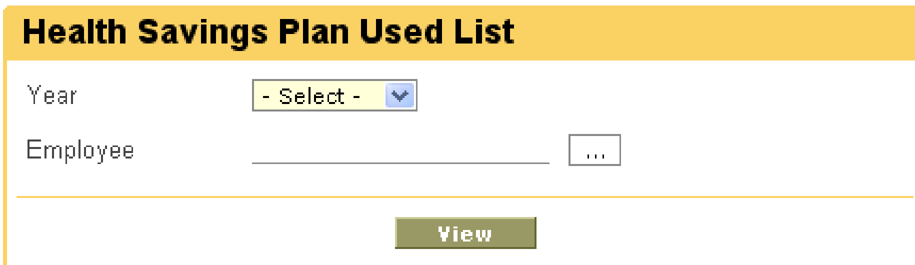
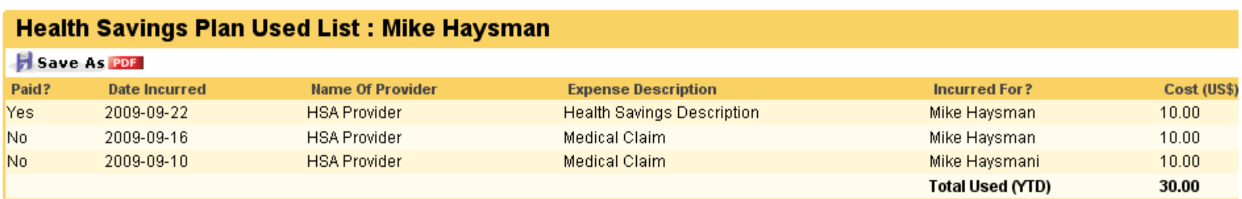


Figure 8.1.5.1

The year has to be selected from the drop down and the employee from the list that will pop up upon clicking on ... select an employee from the list to view his HSP expenditure.

Figure 8.1.5.1 is shows an example of an employee's HSP used list.



Health Savings Plan Used List : Mike Haysman

Save As PDF

Paid?	Date Incurred	Name Of Provider	Expense Description	Incurred For?	Cost (US$)
Yes	2009-09-22	HSA Provider	Health Savings Description	Mike Haysman	10.00
No	2009-09-16	HSA Provider	Medical Claim	Mike Haysman	10.00
No	2009-09-10	HSA Provider	Medical Claim	Mike Haysmani	10.00
				Total Used (YTD)	**30.00**

Figure 8.1.5.1

8.1.6 HSP Used

Here the Admin can view the HSP Used by an employee. To view HSP Used details of an employee select “HSP Used” from “Health Savings Plan” and then you will see the screen shown on figure 8.1.6.1.

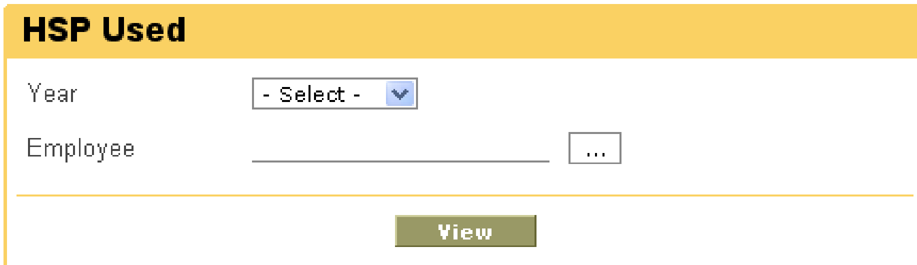
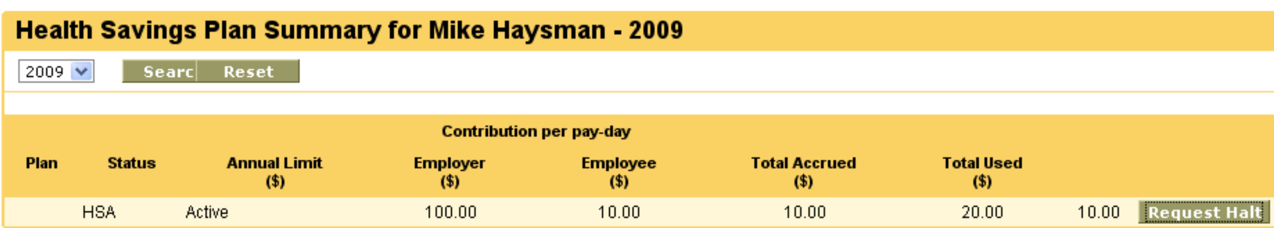


Figure 8.1.6.1

The year has to be selected from the drop down and the employee from the list that will pop up upon clicking on ... select an employee list to view his HSP Used.

8.1.7 Personal HSP Summary

This feature is available for the ESS User. The user can view details of his HSP here. The user can also request the admin to halt or resume his HSP plan by clicking on “Request Halt” or cancel the request by clicking “Cancel Halt Request”. The actions will be notified to the Admin via email. Figure 8.1.7.1 is an example of HSP Summary.



Plan	Status	Annual Limit ($)	Contribution per pay-day: Employer ($)	Employee ($)	Total Accrued ($)	Total Used ($)	
HSA	Active	100.00	10.00	10.00	20.00	10.00	Request Halt

Figure 8.1.7.1

8.2 Payroll Schedule

Here the Admin can define the pay period and define schedules. The Payroll Schedule consists of the following sub menus:

- View Payroll Schedule
- Add Pay Period

8.2.1 View Payroll Schedule

The Admin can view a payroll schedule by selecting "View Payroll Schedule" from Payroll Schedule; upon selecting this, the following screen shown on figure 8.2.1.1 will appear.

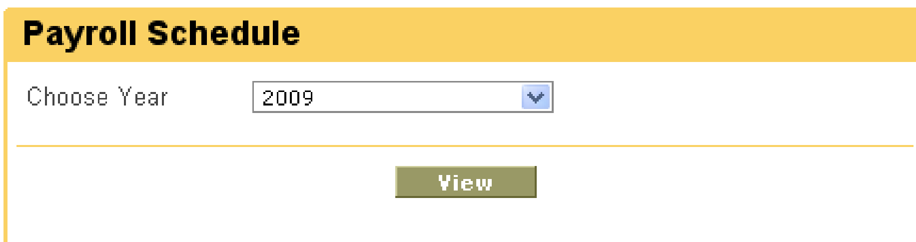


Figure 8.2.1.1

Select the year and click "View", you will then see the screen shown on figure 8.2.1.2.

Figure 8.2.1.2

This will show a summary of the payroll schedule, for a detailed view click on the "Check Date."

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

8.2.2 Add Pay Period

The Admin can define on how often payments will be made to employees. To define a Pay Period select “Add Pay Period” from Payroll Schedule and the screen shown figure 8.2.2 will appear.

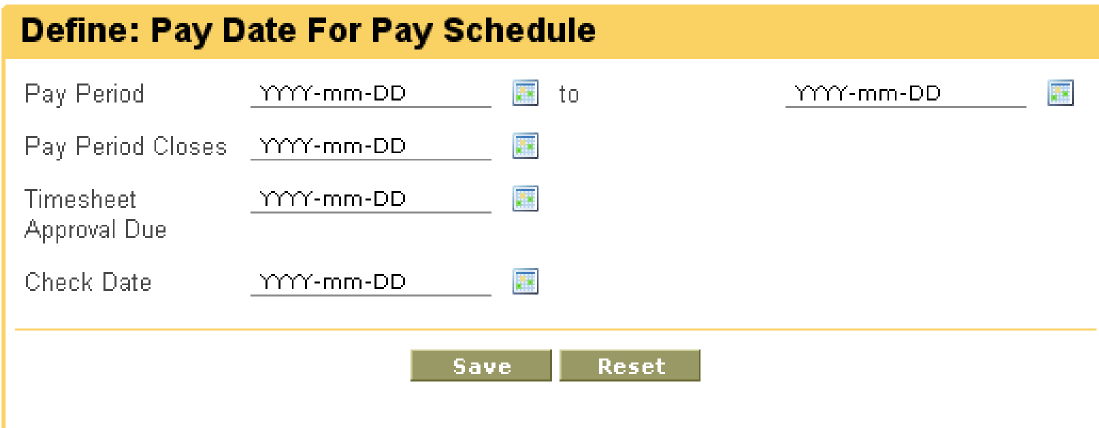
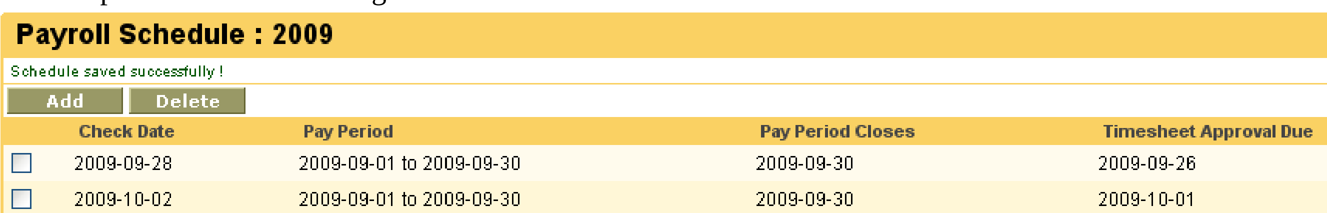


Figure 8.2.2.1

Enter the dates for the relevant fields and click “Save”, you will see the list of defined pay periods as shown on figure 8.2.2.2.



Payroll Schedule : 2009

Schedule saved successfully !

Add Delete

	Check Date	Pay Period	Pay Period Closes	Timesheet Approval Due
☐	2009-09-28	2009-09-01 to 2009-09-30	2009-09-30	2009-09-26
☐	2009-10-02	2009-09-01 to 2009-09-30	2009-09-30	2009-10-01

Figure 8.2.2.2

To view details of a pay period click on “Check Date”.

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

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 send to them. Successful applicants are added to the system.

9.1 Job Vacancies

Here the Admin can create a vacancy for a particular job title required by the company. To add a vacancy select "Job Vacancies" and click "Add" and the following screen shown on figure 8.1.1 will appear.

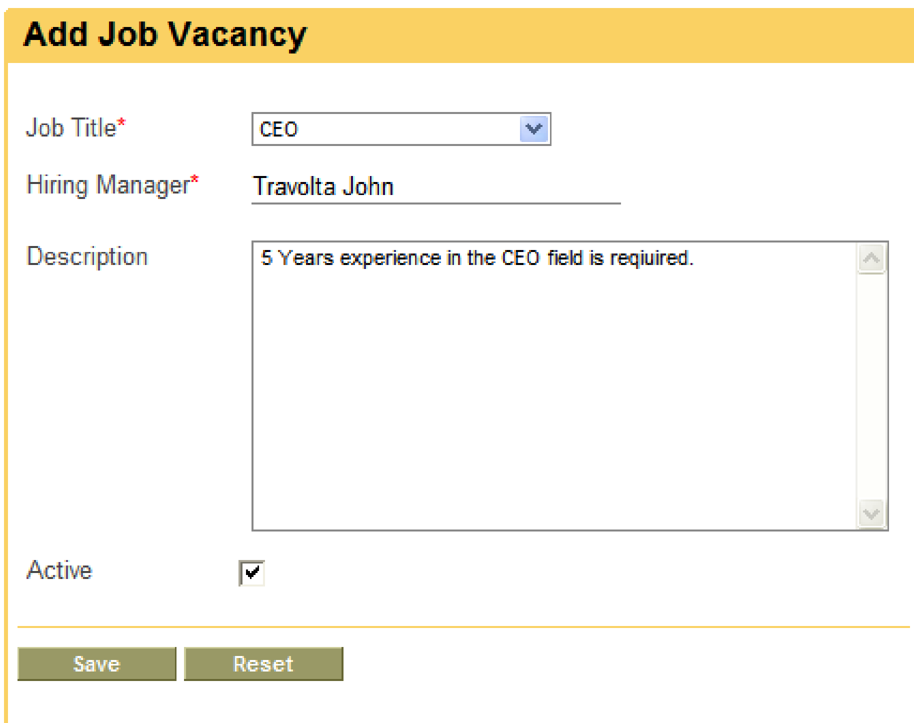
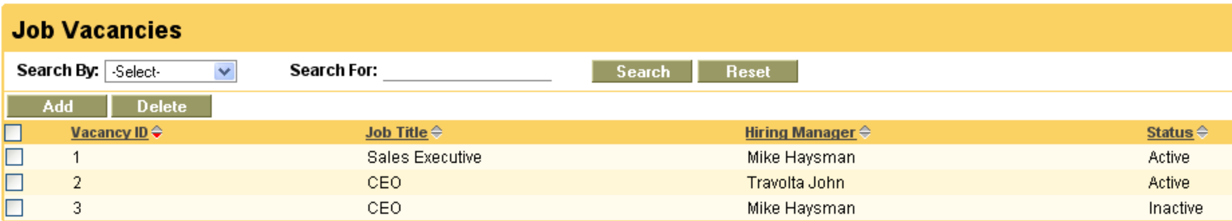


Figure 9.1.1

Once the details has been entered click the "Active" check box if you want to start hiring right away or leave it blank if you intend to hire in the future.

Click "Save" and the vacancy will be listed as shown on figure 9.1.2.



Job Vacancies

Search By: -Select- Search For: Search Reset

Add Delete

	Vacancy ID	Job Title	Hiring Manager	Status
	1	Sales Executive	Mike Haysman	Active
	2	CEO	Travolta John	Active
	3	CEO	Mike Haysman	Inactive

Figure 9.1.2

9.2 Applying for a Vacancy

Both internal and external applicants can apply for a vacancy through jobs.php, for e.g. http://localhost/orangehrm2.5/jobs.php. The screen on figure 9.2.1 shows couple of active vacancies posted.

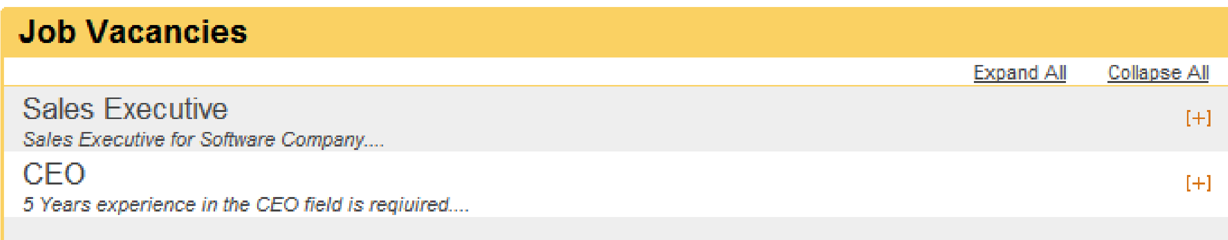
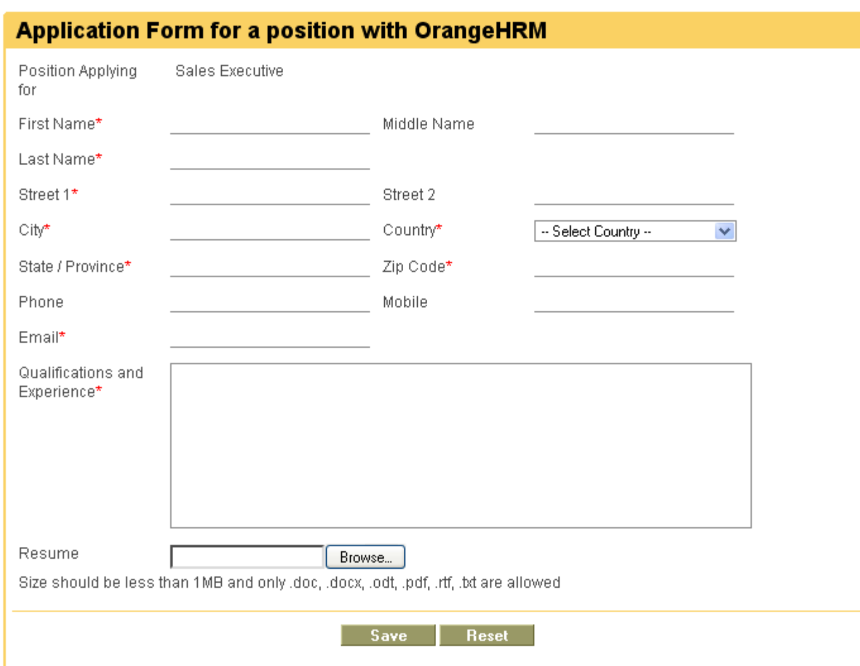


Figure 8.2.1

An applicant can apply to a vacancy by clicking [+] and then click on "Apply", the following application form shown on figure 9.2.2 will then appear.



Application Form for a position with OrangeHRM

Position Applying for: Sales Executive

First Name* | Middle Name
Last Name*
Street 1* | Street 2
City* | Country* -- Select Country --
State / Province* | Zip Code*
Phone | Mobile
Email*
Qualifications and Experience*
Resume Browse...
Size should be less than 1MB and only .doc, .docx, .odt, .pdf, .rtf, .txt are allowed

Save Reset

Fields marked with an asterisk * are required.

Figure 9.2.2

After entering the relavant information the applicant can choose to upload his resume or any other document.

The applicant will see the message shown on figure 8.2.3 and will receive a mail confirming the submission. The Admin and the Hiring Manager will also will receive a mail about the application.

Job Application Received

Your application for the position of Sales Executive was received. An email confirmation was sent to the following email address: jsawyer@orangehrm.com

Figure 9.2.3

9.3 Applicants

All the applicants who apply for a particular vacancy will be shown here in “Applicants” under the Recruitment Module. An example is shown on figure 9.3.1.

Applicants

Name	Position Applied	Hiring Manager	Status	Actions	
Sindy John	Sales Executive	Mike Haysman	Hired		Event History Details
James Sawyer	Sales Executive	Mike Haysman	Application Submitted	Reject Schedule 1st Interview Offer Job	Event History Details

Figure 9.3.1

From here the Admin can:

- Reject an application
- Schedule an interview
- Offer job
- View event history
- View Details

9.3.1 Reject

The Admin or Hiring Manager can turn down an application. To do so click on “Reject” option on the particular applicants tab and the screen shown on figure 8.3.1.1 will appear.

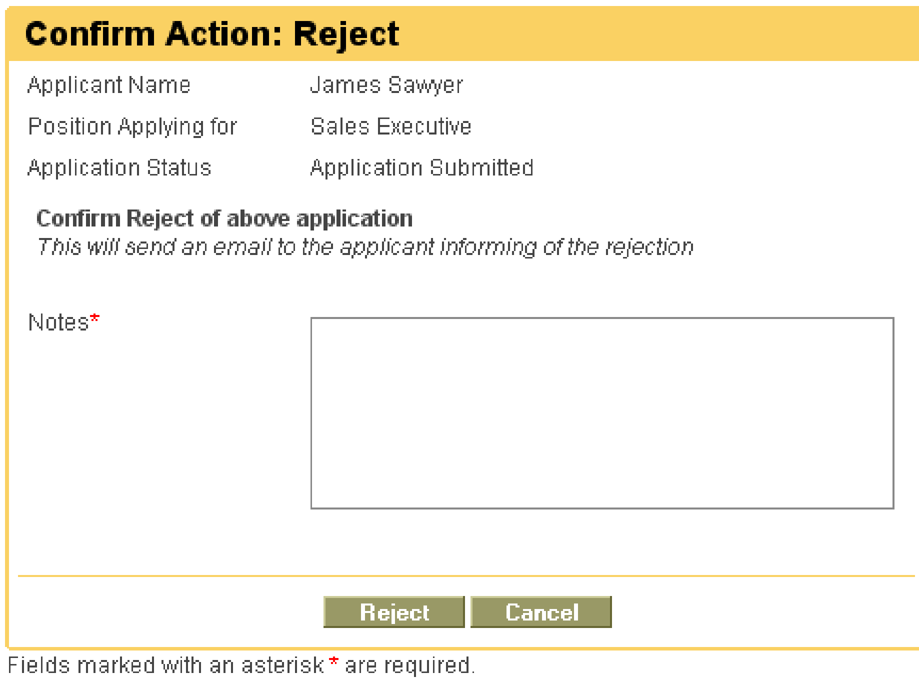


Figure 9.3.1.1

The Admin or Hiring Manager can add the reason for the rejection on “Notes” and click “Reject” or click “Cancel” to go back to the previous screen.

If Admin rejects the application, the applicant will be notified via email.

9.3.2 Schedule an Interview

The Admin or Hiring Manager can schedule an interview with applicant. To schedule an interview click on “Schedule an Interview” and the screen shown on figure 9.3.2.1 will appear.

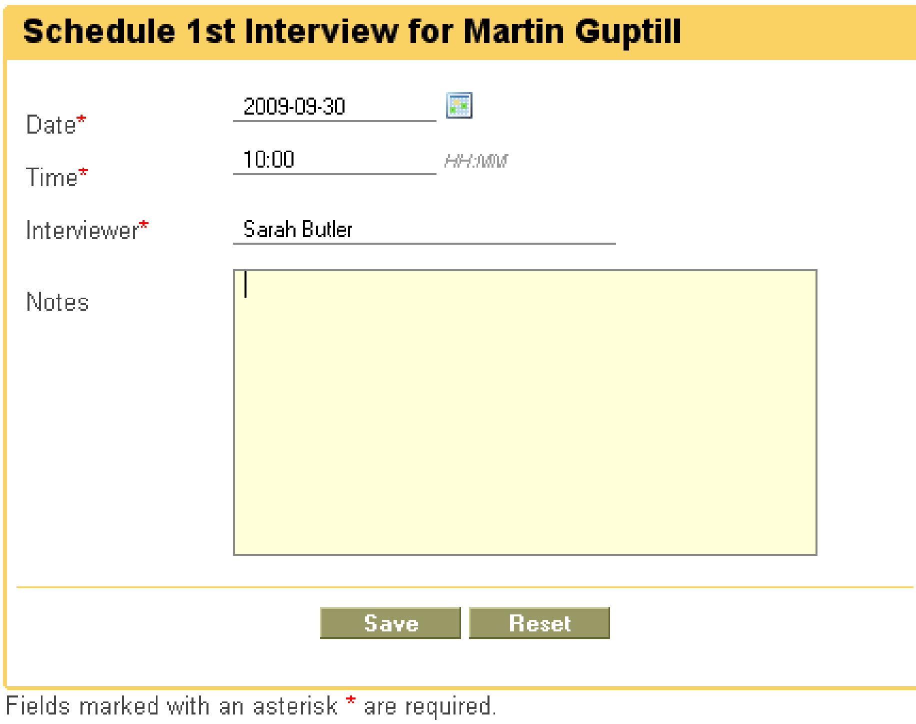


Figure 9.3.2.1

The Admin or Hiring Manager can enter the date, time and assign a person to conduct the interview. Once done click “Save” and an email will be sent to the applicant and the interviewer.

After the first interview the, Admin or Hiring Manager can schedule the second interview in the same way.

Upon successfully completing the second interview the Hiring Manger or Admin can select to “Reject” or “Offer Job” as shown on figure 9.3.2.2.

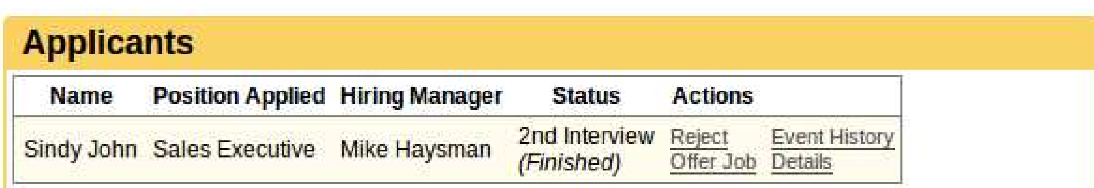


Figure 9.3.2.1

9.3.3 Offer Job

The Admin or Hiring Manager can offer the job by selecting “Offer Job”. Once this option is selected the screen shown on figure 9.3.3.1 will appear.

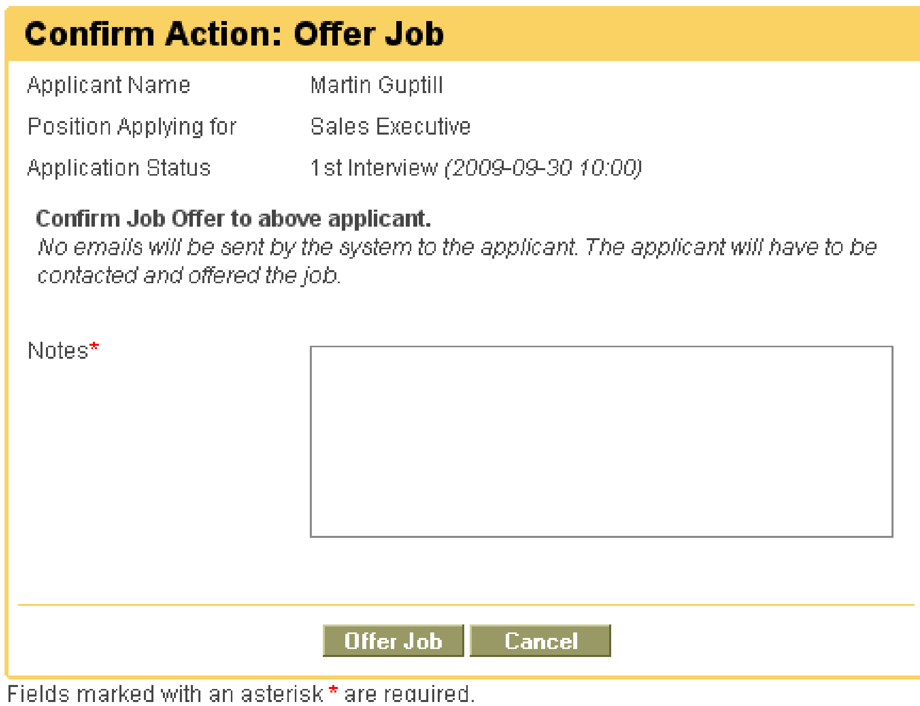


Figure 9.3.3.1

The Admin or Hiring Manager has to add the relevant notes for hiring and then click “Offer Job” to hire the applicant. The hiring has to be then approved by the relavant person as shown on figure 9.3.3.2.

9.3.4 Mark Offer Declined

If incase the offer was declined by the applicant then it can be listed as a declined offer from “Mark Offer Declined”. The following screen shown on figure 9.3.4.1 will appear.

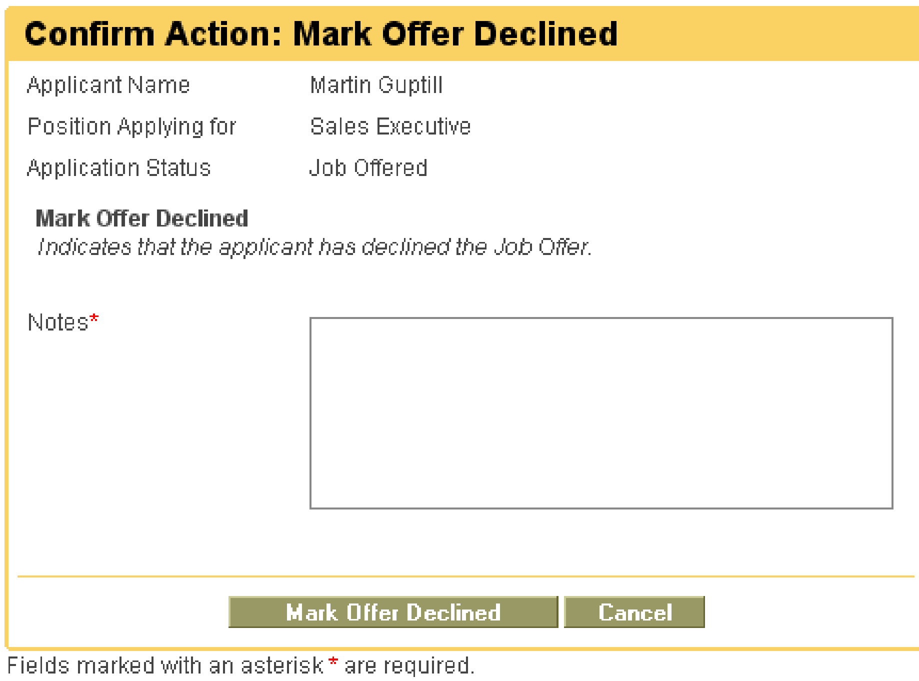


Figure 9.3.4.1

Enter the reasons for the decline and click “Mark Offer Declined”.

9.3.5 Seek Approval

The applicant will not be notified via email. He has to be contacted manually to communicate this information.

Figure 9.3.5.1

Select the person who has to approve the recruitment and add any notes if you wish and click "Save".

An email will be then sent to the Hiring Manager who has to approve the hiring.

This particular Hiring Manger can select to "Approve" or "Reject" from the Recruitment Module on his login. The screen on figure 9.3.5.2 shows the status of an approved applicant. Once the Hiring Manger approves the applicant an entry in the PIM Module will be created for this new employee.

Applicants

Successfully Updated

Name	Position Applied	Hiring Manager	Status	Actions
Sindy John	Sales Executive	Mike Haysman	Hired	Event History Details

Figure 9.3.5.2

9.3.6 Event History & Details

Event history will be a log of the stages of the recruitment process. An event history will be maintained separately for each applicant.

During each stage of the recruitment the particular person involved can edit and add comments and change the status of the scheduled interviews. An example is shown on figure 9.3.6.1. Below the “Event History” the details of the applicant are available along with the status of his application.

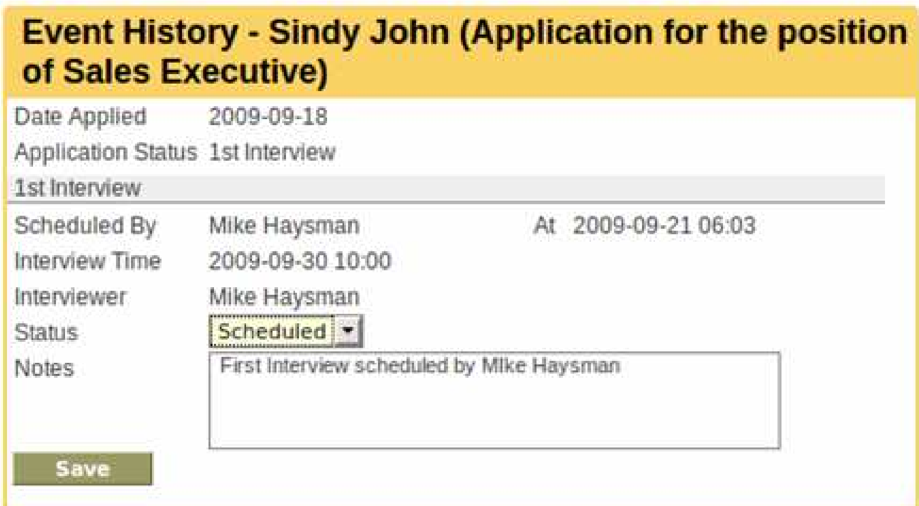


Figure 9.3.6.1

10.0 ESS

This module is available to the ESS – Supervisor and the ESS User. Both these users will see this screen once they login or if they select "ESS" from the main menu.

A user can only edit certain fields from the ESS Module, but he can view all the details relating.

The following fields are restricted.

Salary	Pay Grade
	Currency
	Minimum salary
	Maximum Salary
	Basic Salary
	Pay Frequency
Personal Details	Code
	SSN No
	SIN No
	Driver License No
	Date Of Birth
Immigration	Passport/Visa
	Passport/Visa No
	19 Status
	19 Review Date
	Citizenship
	Issued Date
	Date of Expiry
	Comments
Photo Graph	Select a Photo
Job	Job Title
	Employment Status
	Jobs Specification
	Job Details
	EEO Job Category
	Joined Date
	Sub Division
	Locations
	Contract Extension Start Date
	Contract Extension End Date

Salary	Pay Grade
	Currency
	Minimum salary
	Maximum Salary
	Basic Salary
	Pay Frequency
Tax Exemptions	Status
	State
	Extension
	Unemployment State
	Work State
	Exceptions
	Status
Direct Deposits	Account
	Account Type
	Routing Number
	Amount
	Transaction Type
Work Experience	Employer
	Job Title
	Comments
	Start Date
	End Date
	Internal
Skills	Skill
	Years Of Experience
	Comments
Custom	Custom

11.0 Reports Module

Reports of various combinations can be defined here depending on the requirements.

The Report Module menu contains the following sub menus:

- View Reports
- Define Reports

11.1 Define Reports

To generate reports the admin has to first define the criteria for the required reports. To define a report select "Define Reports" from the Reports Module, click "Add" and you will see the screen shown on figure 11.1.1.

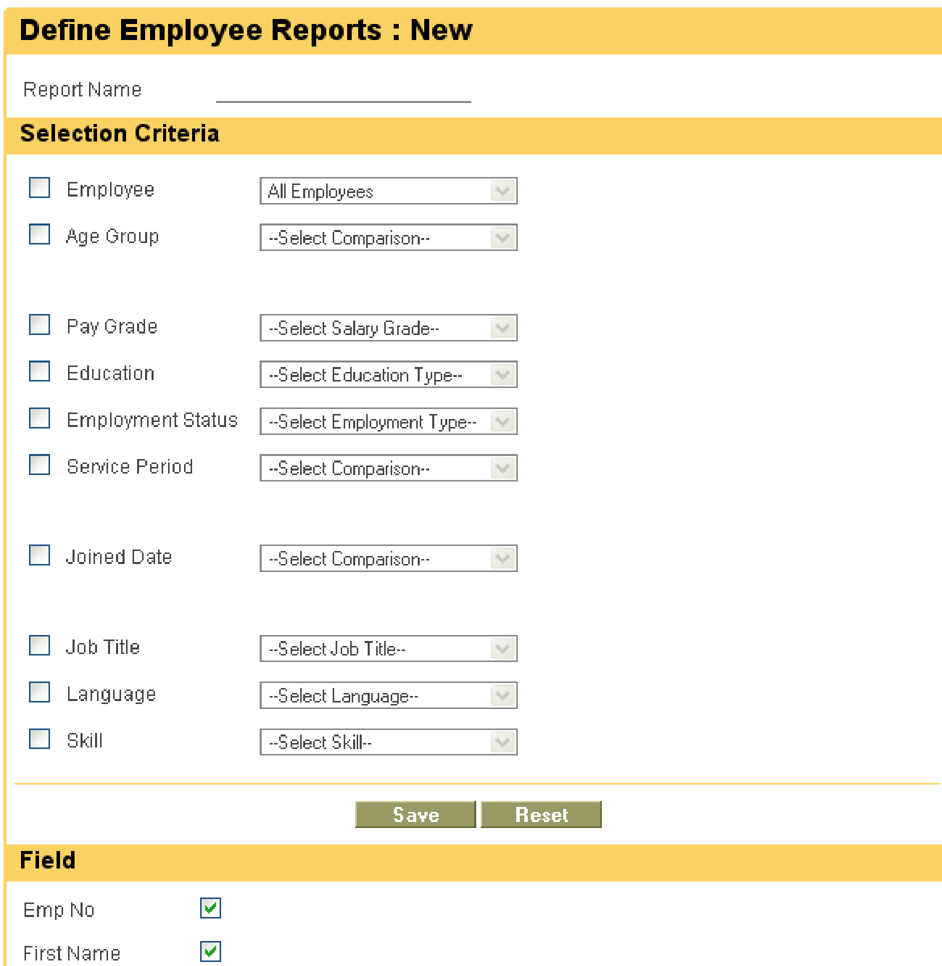


Figure 11.1.1

Enter a name for the report, define the selection criteria and select the fields that need to be displayed.

Click "Save" once you are done and you will see the screen shown n figure 11.1.2.

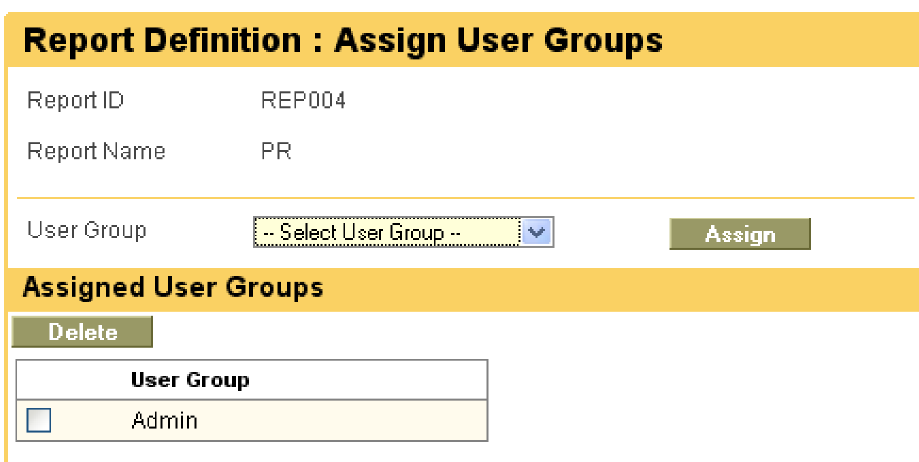


Figure 10.1.2

Here you select which user groups will have access to the reports you define.

To edit a defined click on the particular "Report ID".

To delete an entry click on the check box next to the particular entry and press "Delete".

Multiple selections can be deleted simultaneously.

11.2 View Reports

Once reports are defined you can view them here. The defined reports will be listed as shown in figure 11.2.1.

View Employee Reports

Search By: -Select- Search For: Search Reset

Report ID	Report Name
REP002	Dash Board
REP003	Terminated Employees
REP004	PR

Figure 11.2.1

You can view a report by clicking on the "Report ID".

Figure 11.2.2 is an example of a report.

Employee No	Employee First Name	Employee Last Name	Address	Telephone	Age Group	Report to	Reporting Method	Job Title
1	Mike	Haysman	2301 East Lamar Blvd., , Arlington, TX, US, 76006	+1 123 123 4567	0	—	—	CEO
4	Travolta	John	, , , NJ, US,	—	0	• Mike Haysman • Sarah Butler	• Direct	Sales Executive
20	Sarah	Butler	1210 W. Valley Dr., , Los Angeles, CA, US, 91742	123456789	29	• Mike Haysman	• Direct	Sales Executive
22	Sindy	John	1258 W. Valley Dr., , Canbera, Canbera, AU, 15487	—	—	—	—	Sales Executive
23	Martin	Guptill	Annie Avenue, , Albany, NY, US, 17524	—	—	—	—	Sales Executive

Figure 11.2.2

12.0 Bug Tracker

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

- Access the Bug Tracker by clicking on Bug Tracker from the top menu.
- Enter the different criteria and description. See figure 12.1 below.

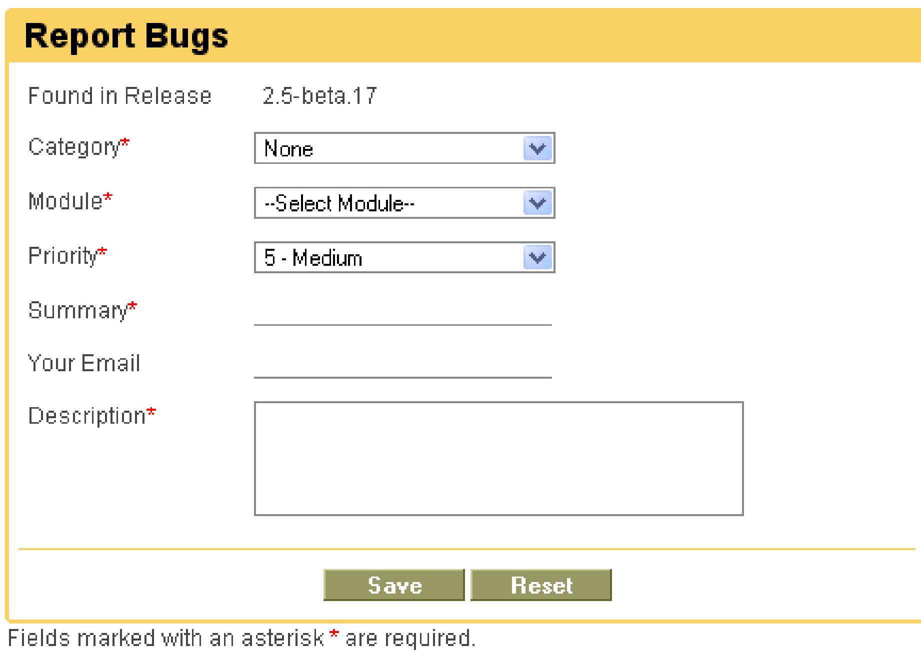


Figure 12.1

Once you have entered details about the bug click “Send”.

13.0 Help

Help features help topics, professional OrangeHRM Support, Forum, and Blog.

13.1 Help Contents

Here you can get access to FAQ's and the OrangeHRM Wiki to clarify further doubts on the product.

http://www.orangehrm.com/wiki/index.php/Main_Page

http://www.orangehrm.com/frequently-asked-questions.shtml

13.2 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

13.3 Forum

The OrangeHRM Forum is a place where all the users post there questions, comments and find outs about OrangeHRM.

http://www.orangehrm.com/forum/

13.4 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/