



# User Guide

# OrangeHRM 2.2

Document Version 1.0



Copyright © OrangeHRM Inc. 2005 - 2007

**License**

The contents of this document are subject to the GNU General Public License (GPL). You may not use this document except in compliance with the License. You can obtain a copy of the License at <http://www.fsf.org/licenses/gpl.html>.

# Table of contents

<b>About this document.....</b>	<b>8</b>
Conventions used in this document.....	9
<b>Chapter 1.....</b>	<b>10</b>
<b><u>1 Overview.....</u></b>	<b><u>10</u></b>
<b>Chapter 2.....</b>	<b>13</b>
<b><u>2 Login Information.....</u></b>	<b><u>13</u></b>
<u>2.1 Changing your password.....</u>	<u>13</u>
<u>2.2 Logging out.....</u>	<u>14</u>
<b>Chapter 3.....</b>	<b>15</b>
<b><u>3 Welcome Screen.....</u></b>	<b><u>15</u></b>
<b>Chapter 4.....</b>	<b>16</b>
<b><u>4 Admin Module.....</u></b>	<b><u>16</u></b>
<u>4.1 Company Info.....</u>	<u>17</u>
<u>4.1.1 General.....</u>	<u>17</u>
4.1.1.1 Edit General info.....	18
<u>4.1.2 Company Structure.....</u>	<u>18</u>
4.1.2.1 Add to Company Structure.....	18
4.1.2.2 Delete from Company Structure.....	19
<u>4.1.3 Locations.....</u>	<u>20</u>
4.1.3.1 Add Location.....	20
4.1.3.2 Edit Location.....	21
4.1.3.3 Delete Location.....	21
<u>4.2 Job.....</u>	<u>21</u>
<u>4.2.1 Job Titles.....</u>	<u>22</u>
4.2.1.1 Add Job Title.....	22
4.2.1.2 Edit Job Title.....	22
4.2.1.3 Delete Job Title.....	23
<u>4.2.2 Pay Grades.....</u>	<u>23</u>
4.2.2.1 Add Pay Grade.....	23
4.2.2.2 Edit Pay Grade.....	24
4.2.2.3 Delete Pay Grade.....	24
<u>4.2.3 Employment Statuses.....</u>	<u>24</u>
4.2.3.1 Add Employment Status.....	24
4.2.3.2 Edit Employment Status.....	25
4.2.3.3 Delete Employment Status.....	25
<u>4.2.4 EEO Job Categories.....</u>	<u>25</u>

4.2.4.1 Add EEO Job Category.....	26
4.2.4.2 Edit EEO Job Category.....	26
4.2.4.3 Delete EEO Job Category.....	27
<b>4.3 Qualifications.....</b>	<b>27</b>
4.3.1 Education.....	27
4.3.1.1 Add Education.....	27
4.3.1.2 Edit Education.....	28
4.3.1.3 Delete Education.....	28
4.3.2 Licences.....	28
4.3.2.1 Add License.....	28
4.3.2.2 Edit Licenses.....	28
4.3.2.3 Delete Licenses.....	29
<b>4.4 Skills.....</b>	<b>29</b>
4.4.1 Skills.....	29
4.4.1.1 Add Skill.....	29
4.4.1.2 Edit Skill.....	29
4.4.1.3 Delete Skill.....	30
4.4.2 Languages.....	30
4.4.2.1 Add Language.....	30
4.4.2.2 Edit Language.....	30
4.4.2.3 Delete Language.....	30
<b>4.5 Memberships.....</b>	<b>31</b>
4.5.1 Membership Types.....	31
4.5.1.1 Add Membership Type.....	31
4.5.1.2 Edit Membership Type.....	32
4.5.1.3 Delete Membership Type.....	32
4.5.2 Memberships.....	32
4.5.2.1 Add Membership.....	33
4.5.2.2 Edit Membership.....	34
4.5.2.3 Delete Membership.....	34
<b>4.6 Nationality and Race.....</b>	<b>34</b>
4.6.1 Nationalities.....	34
4.6.1.1 Add Nationality.....	35
4.6.1.2 Edit Nationality.....	35
4.6.1.3 Delete Nationality.....	35
4.6.2 Race.....	36
4.6.2.1 Add Race.....	36
4.6.2.2 Edit Race.....	37
4.6.2.3 Delete Race.....	37
<b>4.7 Users.....</b>	<b>37</b>
4.7.1 HR Admin Users.....	37
4.7.1.1 Add HR Admin User.....	38
4.7.1.2 Edit HR Admin User.....	39

4.7.1.3 Delete HR Admin User.....	39
4.7.2 ESS Users.....	39
4.7.2.1 Edit User Group.....	40
4.7.2.2 Delete User Group.....	40
4.7.3 User Groups.....	40
4.7.3.1 Add Admin User Group.....	41
4.7.3.1.1 Assigning user rights.....	41
4.7.3.2 Edit User Group.....	42
4.7.3.2.1 Editing assigned user rights.....	42
4.7.3.3 Delete User Group.....	43
<b>4.8 Email notifications.....</b>	<b>44</b>
4.8.1 Configuration.....	44
4.8.2 Subscribe.....	44
<b>4.9 Customers.....</b>	<b>45</b>
4.9.1 Add Customer.....	46
4.9.2 Edit Customer.....	46
4.9.3 Delete Customer.....	46
<b>4.10 Projects.....</b>	<b>47</b>
4.10.1 Add Project.....	47
4.10.2 Edit Project.....	48
4.10.3 Delete Project.....	48
<b>Chapter 5.....</b>	<b>49</b>
<b>5 PIM Module.....</b>	<b>49</b>
5.1 PIM Module - Employee Information.....	49
5.1.1 Add Employee to the PIM module.....	50
5.2 PIM Module - Main interface.....	51
5.3 Personal.....	52
5.4 Contact.....	53
5.5 Emergency contact(s).....	53
5.6 Dependants.....	54
5.7 Immigration.....	55
5.8 Job.....	55
5.8.1 Employee Contracts.....	56
5.9 Payments.....	57
5.10 Report-to.....	57
5.11 Work experience.....	58
5.12 Education.....	59
5.13 Skills.....	60
5.14 Languages.....	61
5.15 Licenses.....	62
5.16 Memberships.....	63
5.17 Attachments.....	64

<b>Chapter 6.....</b>	<b>66</b>
<b>6 ESS Module.....</b>	<b>66</b>
<b>Chapter 7.....</b>	<b>67</b>
<b>7 Leave Module.....</b>	<b>67</b>
7.1 Leave Summary.....	68
7.1.1 Administrator views Leave Summary.....	68
7.1.1.1 View Leave Summary .....	69
7.1.1.1.1 Edit Entitled Leave information through Leave Summary .....	69
7.1.2 Supervisor views Leave Summary.....	70
7.1.2.1 Personal Leave Summary.....	70
7.1.2.2 Employee Leave Summary.....	70
7.1.3 ESS User views Leave Summary.....	71
7.2 Define Days Off.....	71
7.2.1 Weekend.....	71
7.2.2 Specific Holidays.....	72
7.2.2.1 Add Specific Holidays.....	72
7.2.2.2 Edit Specific Holiday.....	73
7.2.2.3 Delete Specific Holiday.....	73
7.3 Define Leave Types.....	73
7.3.1.1 Add Leave Type.....	74
7.3.1.2 Edit Leave Type.....	74
7.3.1.3 Delete Leave Type.....	74
7.4 Leave List.....	75
7.4.1 View Leave List.....	75
7.4.2 Edit Leave Statuses.....	76
7.5 Assign Leave.....	77
7.6 Apply for Leave.....	78
7.7 Approve Leave.....	79
<b>Chapter 8.....</b>	<b>81</b>
<b>8 Time Module.....</b>	<b>81</b>
8.1 Personal timesheets.....	81
8.1.1 Edit Timesheets.....	81
8.1.1.1 Add Time Events.....	82
8.1.1.2 Edit Time Events.....	83
8.1.1.3 Delete Time Events.....	83
8.1.2 Submit Timesheets.....	83
8.2 Employee Timesheets.....	84
8.2.1 Administrator access to Employee Timesheets.....	84
8.2.2 Supervisor access to Employee Timesheets.....	86
8.2.3 Approve/Reject and Edit Other Employee Timesheets.....	86

<b>Chapter 9.....</b>	<b>88</b>
<b><u>9 Reports Module.....</u></b>	<b><u>88</u></b>
9.1 Define reports.....	88
<i>9.1.1 Assign User Groups.....</i>	<i>89</i>
9.2 Edit reports.....	90
9.3 View reports.....	91
<b>Chapter 10.....</b>	<b>93</b>
<b><u>10 Bug Tracker.....</u></b>	<b><u>93</u></b>
<b><u>11 Further information.....</u></b>	<b><u>94</u></b>

# About this document

The purpose of this document is to provide information regarding the features of the Human Resource Management System OrangeHRM. The intended audience for this document is primarily the administrative users of the system.

The document is divided into the following chapters:

Chapter	Description
OrangeHRM overview	This chapter gives a brief description of OrangeHRM and its main functionalities.
Login Information	This chapter provides the login details of the system.
Admin Module	This chapter will give step by step instructions on how to use the features of the Admin Module in the OrangeHRM system.
PIM Module	This chapter will give step by step instructions on how to use the features of the PIM Module in the OrangeHRM system.
ESS Module	This chapter will give step by step instructions on how to use the features of the ESS Module in the OrangeHRM system.
Leave Module	This chapter will give step by step instructions on how to use the features of the Leave Module in the OrangeHRM system.
Time Module	This chapter will give step by step instructions on how to use the features of the Time tracking Module in the OrangeHRM system.
Reports Module	This chapter will give step by step instructions on how to use the features of the Reports Module in the OrangeHRM system
Bug Tracker	This chapter explains the functionality of the Bug Tracker Module



---

# Conventions used in this document

We use the following text formatting conventions:

## *italic*

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

## **Bold**

Used for emphasis and for the command options you select.

## Letter gothic

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

## *Letter gothic italic*

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

# Chapter 1

## 1 Overview

OrangeHRM, emerging in line with the new generation of web HR systems, will assist you in managing your company's most important asset - human resource. Orange HRM which is applicable to diverse business industries is a perfect platform for re-engineering your HR processes and redefining the workflow operations of HR professionals, paving the way to a new level of HR Management.

OrangeHRM is based on modular architecture and consists of the following modules:

- **Admin Module**

The part of the system where the HR Manager or other appointed personnel perform all system administration tasks. This include defining company structure, pay grades, company projects and customers and other information that serves as the backbone for the rest of the system. Security issues are taken care of through this module as well by defining user rights.

- **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. Picture of employee is included as well. Information captured in this module is utilized by all other modules, thus eliminating data redundancy.

- **Employee Self Service**

Employee self service is a powerful tool providing employees of the company with the ability to view relevant information such as personal information, updating personal information with web - enabled PC, applying for leave and editing personal timesheets without having to hassle the HR staff.

The functionality of this module spans through the entire system, making information available anywhere, anytime. Of course all information is subject to company defined security policy, where everyone can only view the information he/she is authorized to. Time and cost saving effects from this solution are tremendous.

- **Leave Module**

A comprehensive leave management module with extensive possibilities of defining leave types, company holidays and more. It caters for all application and approval processes and is able to display information on leave entitlement, balance, history etc. Thanks to the web-enabled and self-service concepts, it significantly streamlines all leave related procedures, eliminates paperwork and saves costs.

- **Time Module**

The module automates time tracking related processes. It helps to efficiently organize labour data and improve the workforce management. Time module allows employees to define and submit their timesheets, which can be approved / rejected and modified by their supervisors.

- **Reports Module**

This feature produces customized reports according to your needs. Any number of reports can be defined by selecting from a range of search criteria and report fields. Report definitions can be saved to avoid repeating this task. Once the report definition is saved, the report can be generated by providing the required criteria data.

- **BUG Tracker**

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



## Chapter 2

# 2 Login Information

- Make sure that the AMP stack (Apache, MySql and PHP) is running.
- Open your web browser and enter the url address for OrangeHRM e.g. <http://localhost/orangehrm2/>
- Login to OrangeHRM by using the login name and password previously selected in the installation.



Figure 2.1

## 2.1 Changing your password

You can always change your password by clicking on the **Change Password** link in the top right-hand side of the screen. See Figure below.



Figure 2.2

You will now see the box shown in the figure below. Then simply click **Edit**, enter Old Password, New Password, confirm New Password and click **Save**.

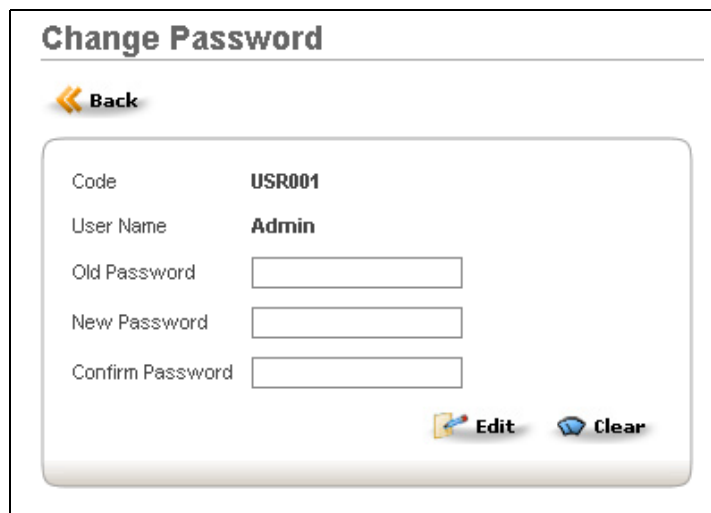


Figure 2.3

## 2.2 Logging out

Once logged in to the system, you can logout by clicking on the Logout link in the top right-hand side of the screen.



Figure 2.4

## Chapter 3

# 3 Welcome Screen

After login to the system you will see the screen showed below in figure 3.1. From the top menu you can select which module to enter. E.g. Admin Module, PIM Module, Reports Module, Leave Module and Bug Tracker (See chapter 1, Overview, for brief description of each module).



Figure 3.1

From the left side menu (see figure 3.1 above) there are also links for info on support as well as direct access to the OrangeHRM Forum and OrangeHRM Blog.

---

# Chapter 4

## 4 Admin Module

The Admin Module is the part of the system where the HR Manager or other appointed personnel perform all system administration tasks. This include defining company structure, pay grades, company customers and projects and other information that serves as the backbone for the rest of the system. Security issues are taken care of through this module as well, by defining user rights.

Select **Admin Module** from the top menu. The first screen of the Admin Module menu is shown in the figure below. It will show the screen for general info on the company (see chapter 4.1 for further info on entering company info).

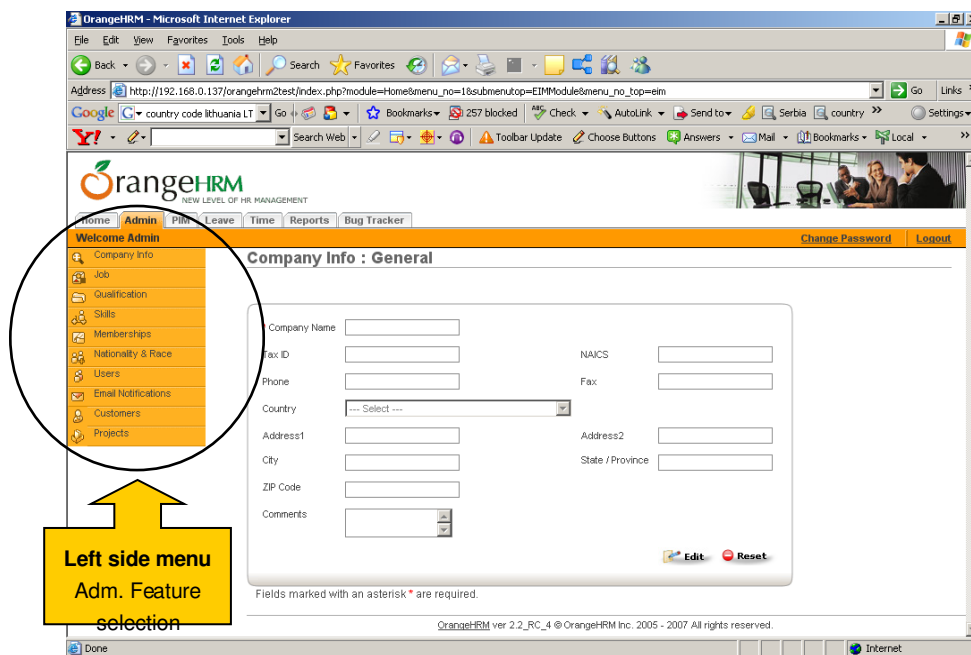


Figure 4.1

From the left side menu the features of the module can be selected. Each feature is described below.

---



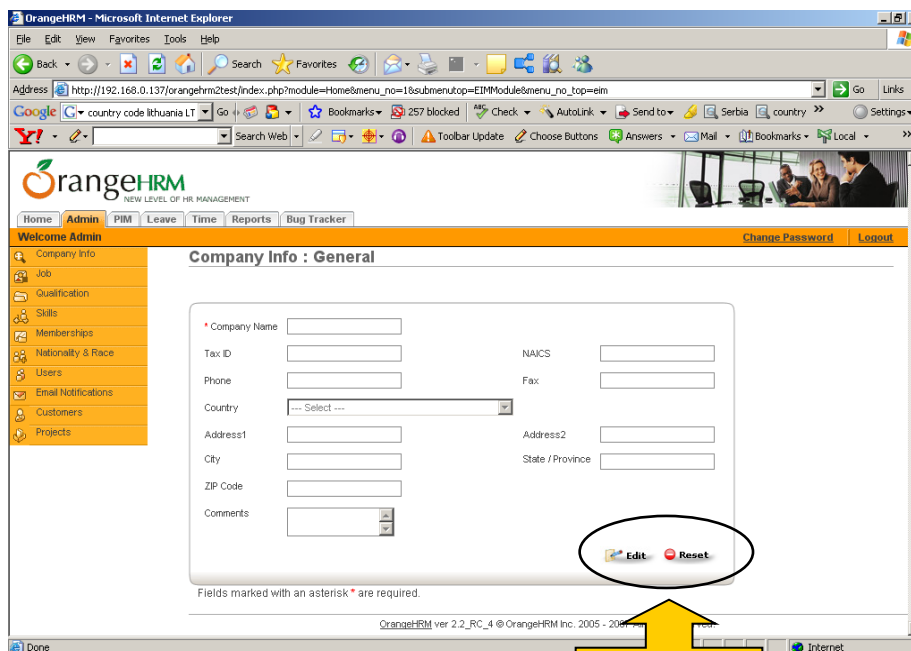
## 4.1 Company Info

All information related to the company is provided through the **Company Info**. The sub menu consists of the following commands.

- General
- Company structure
- Locations

### 4.1.1 General

The basic information on the company can be entered in 'General', see screenshot in figure 4.2 below.



The screenshot shows the OrangeHRM web interface. The main content area is titled 'Company Info : General'. It features a form with the following fields: 'Company Name' (marked with an asterisk), 'Tax ID', 'NAICS', 'Phone', 'Fax', 'Country' (a dropdown menu), 'Address1', 'Address2', 'City', 'State / Province', 'ZIP Code', and 'Comments'. At the bottom of the form, there are two buttons: 'Edit' and 'Reset'. These buttons are circled in black, and a yellow arrow points to them with the text 'Action Buttons Edit/Save and Clear'. Below the form, a note states: 'Fields marked with an asterisk \* are required.' The browser's address bar shows the URL: 'http://192.168.0.137/orangehrm2test/index.php?module=Home&menu\_no=1&submenu\_top=EIMModule&menu\_no\_top=eim'.

Figure 4.2

**Action Buttons**  
Edit/Save and  
Clear

Use the action buttons to edit, clear and save the information (see description below).

**NOTE:** Company Name is required for proceeding with several of the other functions in the system.

---

#### 4.1.1.1 Edit General info

To edit the info in General, click **Edit**, make the required changes and click **Save**. If you type in text in a field and want to undo the change, click on the **Clear** button.

#### 4.1.2 Company Structure

In the company structure you can define and enter all the Departments, Divisions, Teams etc. of the company. This will be useful later in the PIM Module so you assign a work station to each employee and thereby can specify where he/she is located.

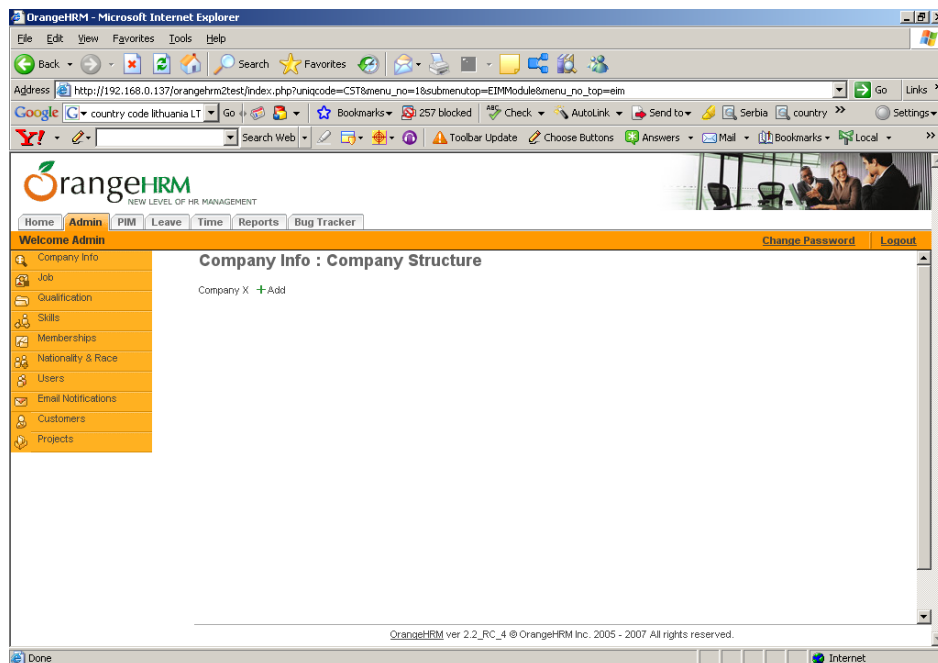


Figure 4.3

#### 4.1.2.1 Add to Company Structure

To add to the company structure click on **Add** shown in the figure below.



Figure 4.4

After clicking Add the fields shown below will appear in the screen.

---

---

### Add a sub-division to Company X

\* Name

\* Type

\* Location

Description

Fields marked with an asterisk \* are required.

Figure 4.5

You can now define a sub-division to your company by entering Name, Type (Division, Department, Team or Other), Location and Description and then clicking **Save**. After saving, it will appear below the company name as shown in Figure 4.6.

### Company Info : Company Structure

Company X + Add

↳ Marketing Department + Add | - Delete

Figure 4.6

**NOTE:** Locations can either be defined from the function in the Company Structure sub menu (see below) or buy choosing **Other** in the drop down menu and then entering the information and clicking **Save**.

#### 4.1.2.2 Delete from Company Structure

To delete simply click **Delete** after the Division, Department etc. that you want to delete, as shown in figure 4.7 below.

### Company Info : Company Structure

Company X + Add

↳ Marketing Department + Add | - Delete

Figure 4.7

---

---

## 4.1.3 Locations

Through this feature you can add, edit and delete the different locations of the company.

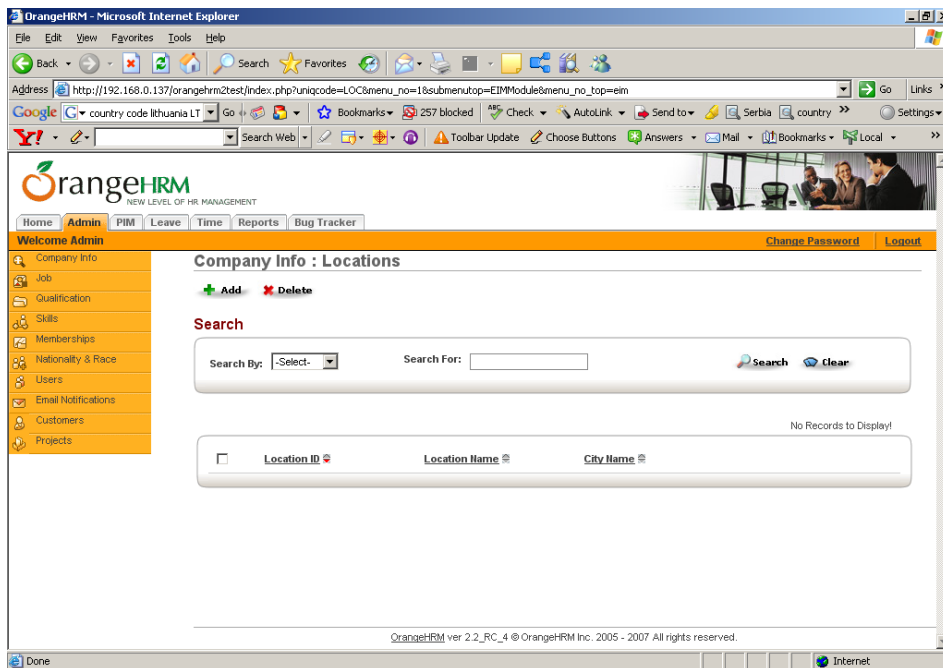


Figure 4.8

### 4.1.3.1 Add Location

To add a new location click **Add** and the screen shown in the figure below will appear. If the save is successful, the Locations page is displayed with a 'Successfully Added' Notification.

---

---

Company Info : Locations

Back

Code LOC001

\* Name

\* Country --Select Country--

State

City

\* Address

\* ZIP

Phone

Fax

Comments

Save Clear

Fields marked with an asterisk \* are required.

Figure 4.9

Enter the information and click **Save**.

#### 4.1.3.2 Edit Location

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

#### 4.1.3.3 Delete Location

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

## 4.2 Job

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

- Job Titles
  - Pay Grades
  - Employment Statuses
-

- 
- EEO Job Categories

## 4.2.1 Job Titles

With the Job Titles feature you can add, delete and edit specific job titles to match the requirements of your company. Start by clicking on **Job Titles** from the left side menu.

### 4.2.1.1 Add Job Title

To add a Job Title click add from and the screen shown in figure below 4.10 will appear.

**Job : Job Title**

[Back](#)

Job Title ID: **JOB001**

\*Job Title Name:

\*Job Description:

Job Title Comments:

\* Pay Grade:

Fields marked with an asterisk \* are required.

Figure 4.10

Enter Job Title Name, Job Description and Job Title Comments if needed.

If you haven't already entered the Pay Grade you want to attach to the Job Title you can do it by clicking **Add Pay Grade**. If you want to edit the Pay Grade(s) already entered click **Edit Pay Grade** (for more information on Pay Grades, please go to section 4.2.2).

After finishing click **Save**. If the save is successful, the Job Titles page is displayed with a 'Successfully Added' Notification.

### 4.2.1.2 Edit Job Title

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

---

---

### 4.2.1.3 Delete Job Title

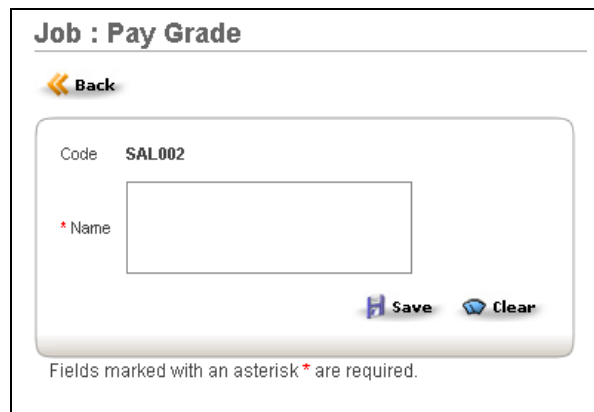
This would allow the user to delete a Job Title. Click on the checkbox against the Job Title ID to be deleted and click **Delete** button. Multiple Job Titles can be deleted simultaneously.

## 4.2.2 Pay Grades

Through this feature you can add, delete and edit different Pay Grades for the company to be connected with the Job Titles. Start by clicking **Pay Grades** from the sub menu of **Job** in the left side menu.

### 4.2.2.1 Add Pay Grade

Click **Add** and you will see the picture shown in figure 4.11. Start by entering the name for the Pay Grade and click **Save**.



The screenshot shows a web form titled "Job : Pay Grade". At the top left, there is a "Back" button with a left-pointing arrow. Below this, the form contains a "Code" field with the value "SAL002". Underneath the code field is a "Name" field, which is marked as required with an asterisk (\*). At the bottom right of the form, there are two buttons: "Save" and "Clear". Below the form, a note reads "Fields marked with an asterisk \* are required."

Figure 4.11

Then you will get the screen shown below for specifying the currency as well as Minimum Salary, Maximum Salary and Step Increase for the Pay Grade. Click **Edit**, enter the specifications and click **Save**. If the save is successful, the Pay Grades page is displayed with a 'Successfully Added' Notification.

---

---

**Job : Pay Grade**

[Back](#)

Code: SAL002

Name: Manager

[Edit](#) [Clear](#)

**Currency Assigned**

\* Currency: --Select Currency--

\* Minimum Salary:

\* Maximum Salary:

\* Step Increase:

[Save](#)

Fields marked with an asterisk \* are required.

Figure 4.12

#### 4.2.2.2 Edit Pay Grade

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

#### 4.2.2.3 Delete Pay Grade

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

### 4.2.3 Employment Statuses

From Employment Statuses you can define all the different employment statuses you need, such as Full time contract, Part time contract, Full time internship etc.

#### 4.2.3.1 Add Employment Status

Click **Add** and you will see the picture shown in Figure X.X. Start by entering the name for the Pay Grade and click **Save**. If the save is successful, the Employment Status page is displayed with a 'Successfully Added' Notification.

---



---

**Job : Employment Status**

◀ Back

Code EST001

\* Description

Save Clear

Fields marked with an asterisk \* are required.

Figure 4.13

#### 4.2.3.2 Edit Employment Status

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

#### 4.2.3.3 Delete Employment Status

This would allow the user to delete an Employment Status. Click on the checkbox against the Employment Status ID to be deleted and click the **Delete** button. Multiple Employment Statuses 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. Start by clicking **EEO Job Categories** from the sub menu of **Job** in the left side menu.

---

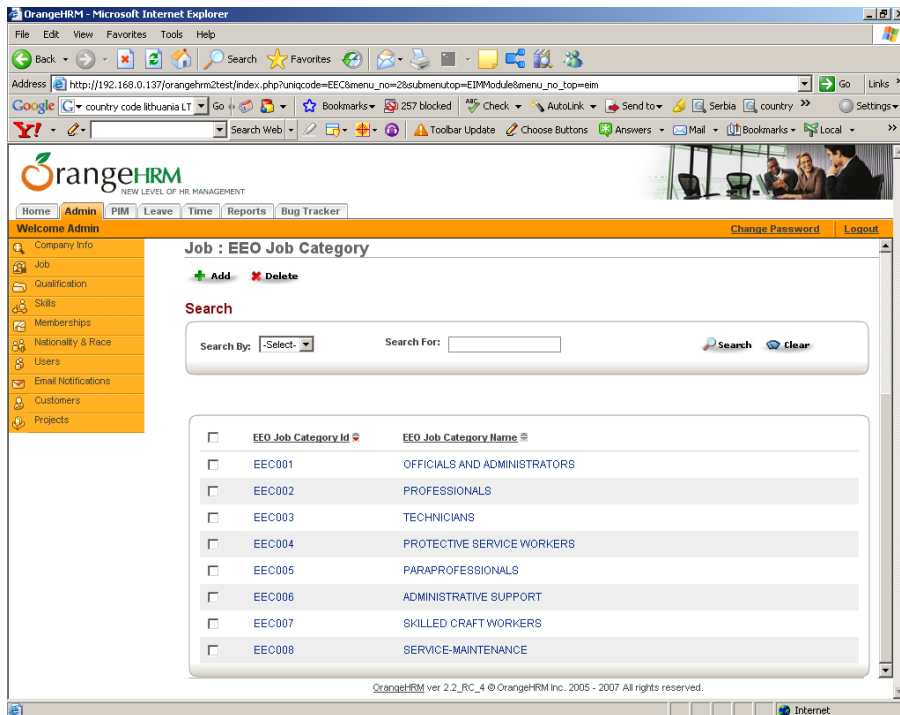


Figure 4.14

#### 4.2.4.1 Add EEO Job Category

Click **Add** and you will see the picture shown in Figure 4.15. Enter the name for the EEO Job Category and click **Save**. If the save is successful, the EEO Job Category page is displayed with a 'Successfully Added' Notification.

The screenshot shows the 'Job : EEO Job Category' form. At the top left, there is a 'Back' button. The form contains the following fields:

- Code: EEC009
- \* Title: (empty text input field)

At the bottom right of the form, there are 'Save' and 'Clear' buttons. Below the form, a note states: 'Fields marked with an asterisk \* are required.'

Figure 4.15

#### 4.2.4.2 Edit EEO Job Category

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

---

#### 4.2.4.3 Delete EEO Job Category

This would allow the user to delete an EEO Job Category. Click on the checkbox against the EEO Job Category ID to be deleted and click the **Delete** button. Multiple EEO Job Categories can be deleted simultaneously.

## 4.3 Qualifications

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

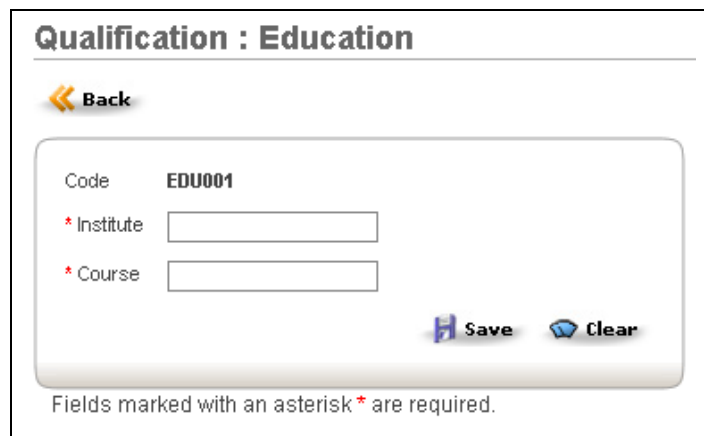
- Education
- Licences

### 4.3.1 Education

The types of education to be used in the PIM module can be entered here. Click **Education** from the left side menu to enter.

#### 4.3.1.1 Add Education

Click **Add** and you will see the picture shown in Figure 4.16. Enter the institute and the course for the education and click **Save**. If the save is successful, the Education page is displayed with a 'Successfully Added' Notification.



**Qualification : Education**

[Back](#)

Code **EDU001**

\* Institute

\* Course

[Save](#) [Clear](#)

Fields marked with an asterisk \* are required.

Figure 4.16

---

---

### 4.3.1.2 Edit Education

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

### 4.3.1.3 Delete Education

This will allow the user to delete an Education. Click on the checkbox against the Education ID to be deleted and click the **Delete** button. Multiple Educations can be deleted simultaneously.

## 4.3.2 Licences

The types of licences to be used in the PIM module can be entered here. Click **Licences** from the left side menu to enter.

### 4.3.2.1 Add License

Click **Add** and you will see the picture shown in Figure 4.17. Enter the License description and click **Save**. If the save is successful, the License page is displayed with a 'Successfully Added' Notification.

**Qualification : Licenses**

[Back](#)

Code **LIC002**

\* Description

[Save](#) [Clear](#)

Fields marked with an asterisk \* are required.

Figure 4.17

### 4.3.2.2 Edit Licenses

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

---

---

### 4.3.2.3 Delete Licenses

This will allow the user to delete a License. Click on the checkbox against the License ID to be deleted and click the **Delete** button. Multiple Licenses can be deleted simultaneously.

## 4.4 Skills

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

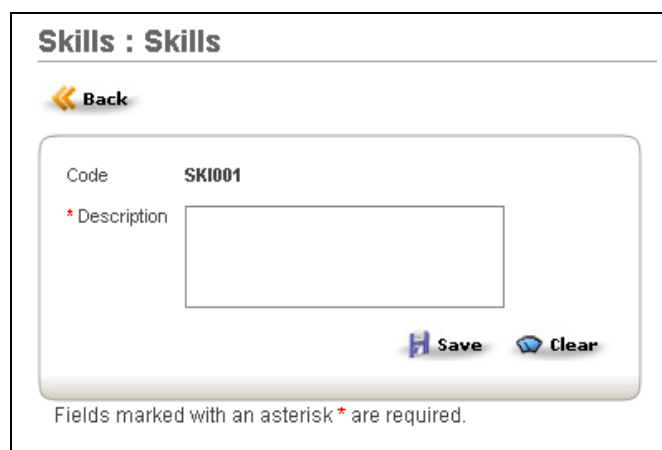
- Skills
- Languages

### 4.4.1 Skills

The types of skills to be used in the PIM module can be entered here. Click **Skills** from the left side menu to enter.

#### 4.4.1.1 Add Skill

Click **Add** and you will see the picture shown in Figure 4.18. Enter the Skill description and click **Save**. If the save is successful, the Skill page is displayed with a 'Successfully Added' Notification.



The screenshot shows a web form titled "Skills : Skills". At the top left, there is a "Back" button with a left-pointing arrow. Below this, the form contains a "Code" field with the value "SKI001" and a "Description" field marked with an asterisk (\*). At the bottom right of the form, there are "Save" and "Clear" buttons. Below the form, a note states: "Fields marked with an asterisk \* are required."

Figure 4.18

#### 4.4.1.2 Edit Skill

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

---

---

### 4.4.1.3 Delete Skill

This will allow the user to delete a Skill. Click on the checkbox against the Skill ID to be deleted and click the **Delete** button. Multiple Skills can be deleted simultaneously.

## 4.4.2 Languages

The types of languages to be used in the PIM module can be entered here. Click **Languages** from the left side menu to enter.

### 4.4.2.1 Add Language

Click **Add** and you will see the picture shown in Figure 4.19. Enter the Language description and click **Save**. If the save is successful, the Language page is displayed with a 'Successfully Added' Notification.



The screenshot shows a web form titled "Skills : Language". At the top left is a "Back" button with a left-pointing arrow. Below the title is a form container with a rounded bottom. Inside, there is a "Code" label followed by the text "LAN001". Below that is a "\* Description" label followed by an empty text input box. At the bottom right of the form container are two buttons: "Save" with a floppy disk icon and "Clear" with a trash can icon. Below the form container, there is a small text note: "Fields marked with an asterisk \* are required."

Figure 4.19

### 4.4.2.2 Edit Language

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

### 4.4.2.3 Delete Language

This will allow the user to delete a Language. Click on the checkbox against the Language ID to be deleted and click the **Delete** button. Multiple Languages can be deleted simultaneously.

---

---

## 4.5 Memberships

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

- Memberships Types
- Memberships

### 4.5.1 Membership Types

The Membership Types page is displayed in Figure 4.20. Types of memberships held by employees are defined in the System. For example, administrator can define Professional Membership Type.

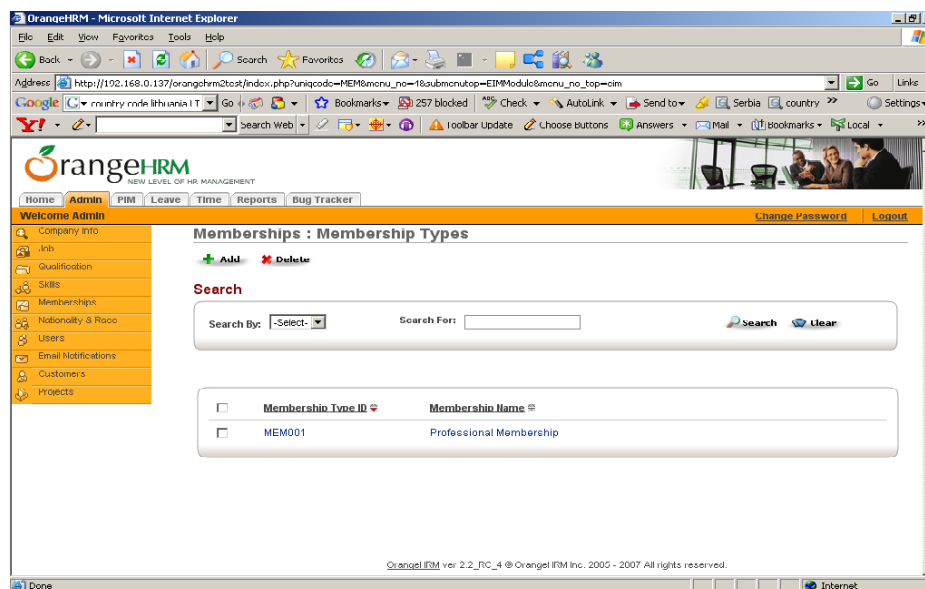


Figure 4.20

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

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

#### 4.5.1.1 Add Membership Type

This would enable the addition of a Membership Type. Click on **Add** button in the Membership Type page. The page used to add a Membership Type is displayed in Figure 4.21.

1. Membership Type ID is automatically generated.
-

---

2. Enter the Description (Membership Type Name)

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

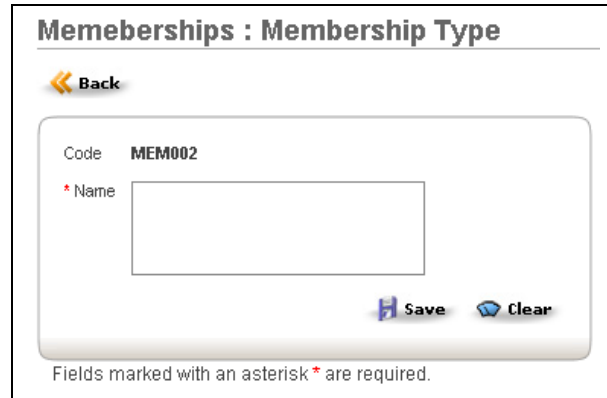


Figure 4.21

#### 4.5.1.2 Edit Membership Type

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

#### 4.5.1.3 Delete Membership Type

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

### 4.5.2 Memberships

The Memberships page is displayed in Figure 4.22. Details of memberships held by employees are maintained in the System.

**NOTE:** It is important to have defined the relevant type of membership before adding a membership. Refer Section 4.5.1.1 to add a membership type.

---



**Memberships : Membership**

+ Add    ✖ Delete

**Search** Successfully Added

Search By:     Name

<input type="checkbox"/>	Membership ID	Membership Name	Membership Type
<input type="checkbox"/>	MME001	CMA	Professional Bodies
<input type="checkbox"/>	MME002	CM	Professional Bodies
<input type="checkbox"/>	MME003	MCSD	Professional Bodies

Figure 4.22

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

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

#### 4.5.2.1 Add Membership

This would enable the addition of a Membership. Click on the **Add** button in the Membership page. The page used to add a Membership is displayed in Figure 4.23

3. Membership ID is automatically generated.
4. Enter the Description (Membership Name)
5. Select Membership Type

Click on the **Save** button. If the save is successful, the Membership page is displayed with a 'Successfully Added' Notification.

**Memberships : Membership**

⏪ Back

Code **MME004**

\* Name

\* Membership Type

Fields marked with an asterisk \* are required.

Figure 4.23

### 4.5.2.2 Edit Membership

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

### 4.5.2.3 Delete Membership

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

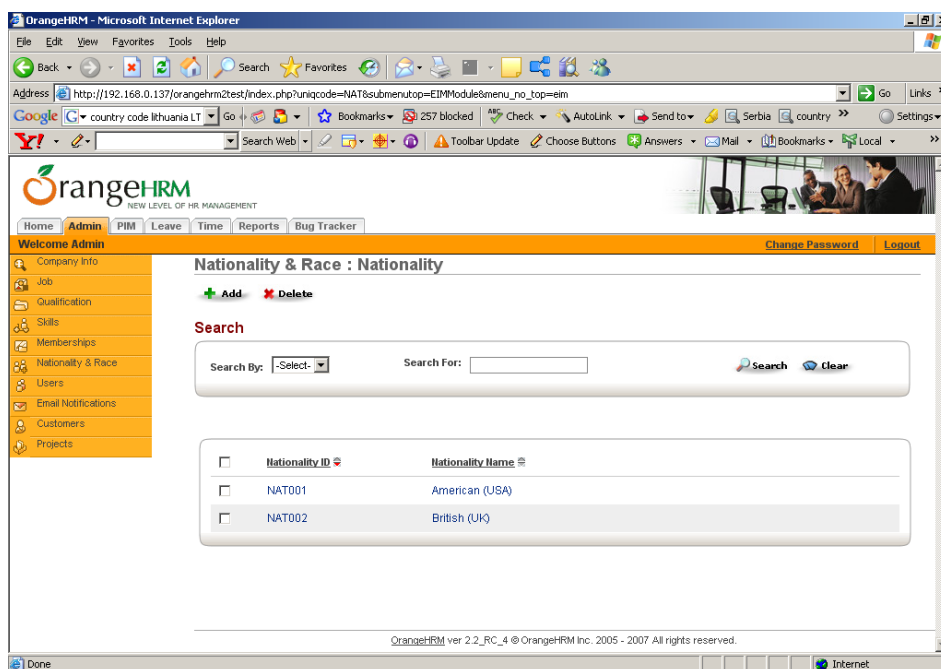
## 4.6 Nationality and Race

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

- Nationalities
- Races

### 4.6.1 Nationalities

The Nationality page is displayed in Figure 4.24. The different Nationalities of employees can be specified in the system.



---

Figure 4.24

A search can be done on Nationalities based on Nationality ID or Nationality Name.

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

#### 4.6.1.1 Add Nationality

This would enable the addition of a Nationality. Click on the **Add** button in the Nationality page. The page used to add a Nationality is displayed in Figure 4.25

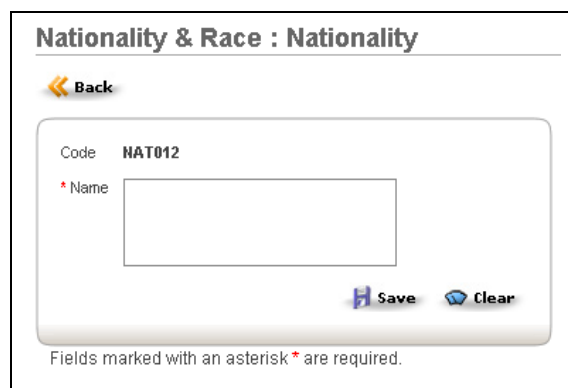


Figure 4.25

6. Nationality ID is automatically generated.
7. Enter the Description (Nationality Name)

Click on the **Save** button. If the save is successful, the Nationality page is displayed with a 'Successfully Added' Notification.

#### 4.6.1.2 Edit Nationality

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

#### 4.6.1.3 Delete Nationality

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

---

---

## 4.6.2 Race

The Races page is displayed in Figure 4.26. The different races of employees can be specified in the system.

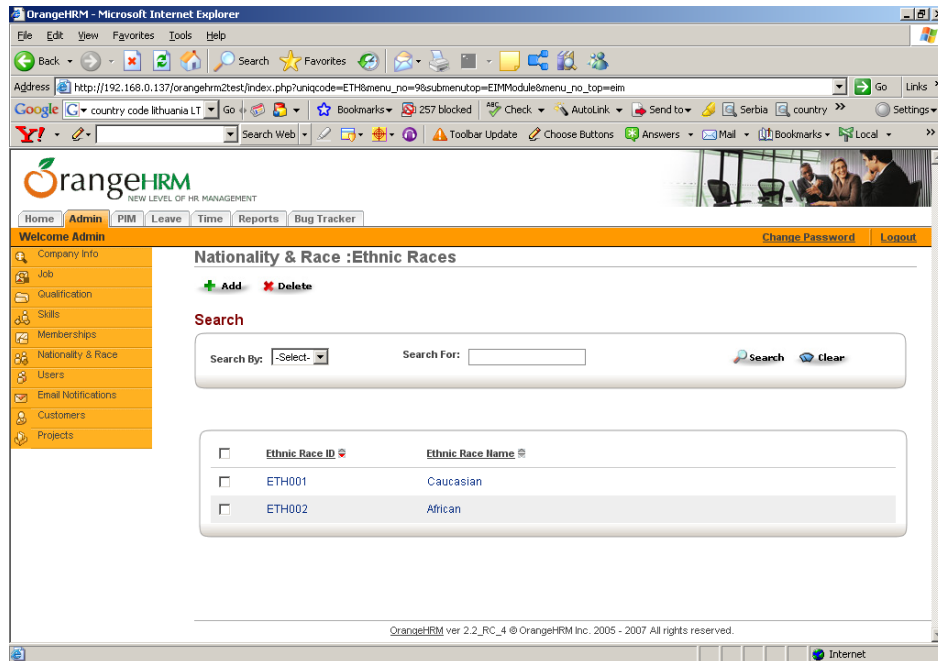


Figure 4.26

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

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

### 4.6.2.1 Add Race

This would enable the addition of a Race. Click on the **Add** button in the Race page. The page used to add a Race is displayed in Figure 4.27.

8. Race ID is automatically generated.
9. Enter the Description (Race Name)

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

---

---

**Nationality & Race : Ethnic Races**

[← Back](#)

Code **ETH008**

\* Name

[Save](#) [Clear](#)

Fields marked with an asterisk \* are required.

Figure 4.27

#### 4.6.2.2 Edit Race

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

#### 4.6.2.3 Delete Race

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

## 4.7 Users

Users can be administered by selecting Users from the menu. The sub menu consists of the following commands.

- HR Admin Users
- ESS Users
- Admin User Groups

### 4.7.1 HR Admin Users

Through this function you can add, edit, delete and manage the HR Admin users of OrangeHRM. To access, click on **HR Admin User** from the sub-menu of Users in the left side menu.

The HR Admin users have specified rights depending on the User Group which they are assigned to (see part 4.7.1.1 below).

---

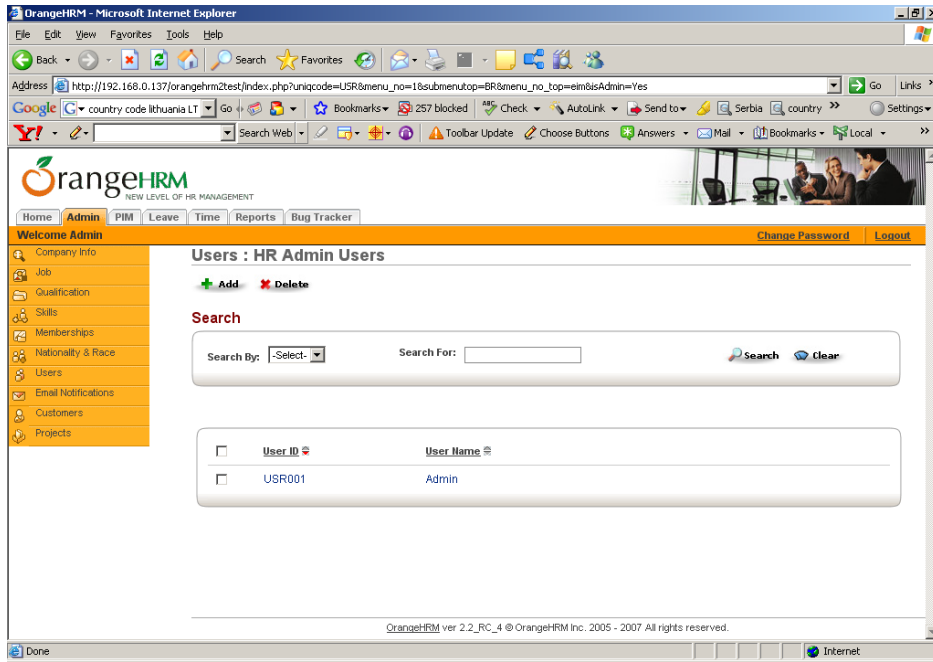


Figure 4.28

#### 4.7.1.1 Add HR Admin User

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

### HR Admin Users

[Back](#)

Code **USR004**

\* User Name

\* Password       \* Confirm Password

Status       Employee  ...

\* User Group

Fields marked with an asterisk \* are required.

Figure 4.29

1. User Code is auto-generated
2. Enter user name
3. Enter password
4. Confirm Password by entering same password
5. Select status (enabled/ disabled)

6. Select employee (not required)
7. Select User Group (see part 4.7.3 for further info on the User Groups)

**NOTE:** Make sure, that employee information is entered into the system prior to creating user account for the employee.

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

#### 4.7.1.2 Edit HR Admin User

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

#### 4.7.1.3 Delete HR Admin User

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

#### 4.7.2 ESS Users

Through this function the Users for the Employee Self Service Module can be created. To access select **ESS Users** from the Users sub menu in the left side menu.

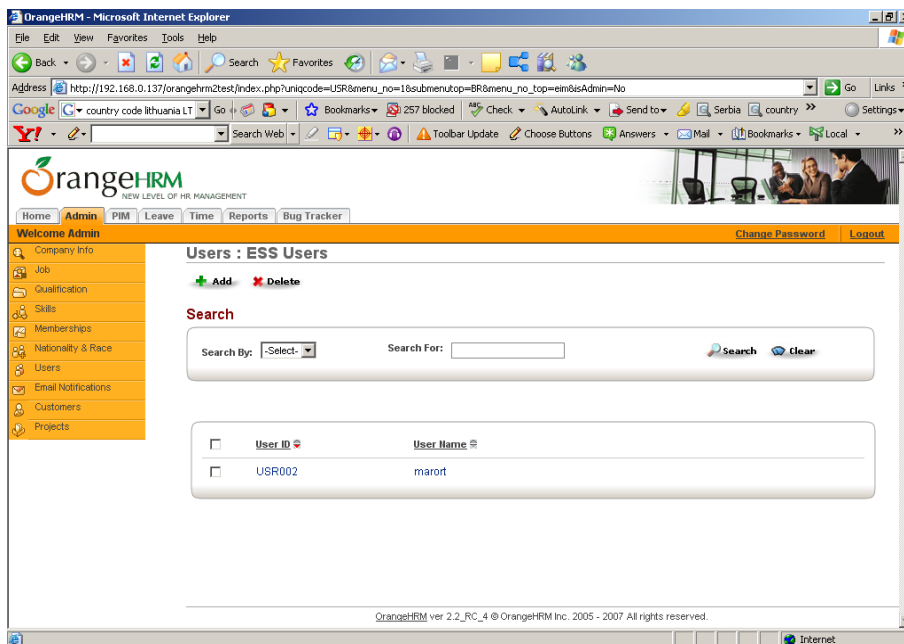


Figure 4.30

- 
1. User Code is auto-generated
  2. Enter user name
  3. Enter password
  4. Confirm Password by entering same password
  5. Select status (enabled/ disabled)
  6. Select employee

**NOTE:** Make sure, that employee information is entered into the system prior to creating user account for the employee.

#### 4.7.2.1 Edit User Group

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

#### 4.7.2.2 Delete User Group

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

#### 4.7.3 User Groups

The user groups to be assigned to the HR Admin users can be created and maintained using this page. Defining the user group allows to assign certain rights and permissions to particular users, who form one group. Click on Admin **Admin User Groups** from the Users sub menu to open the page.

---



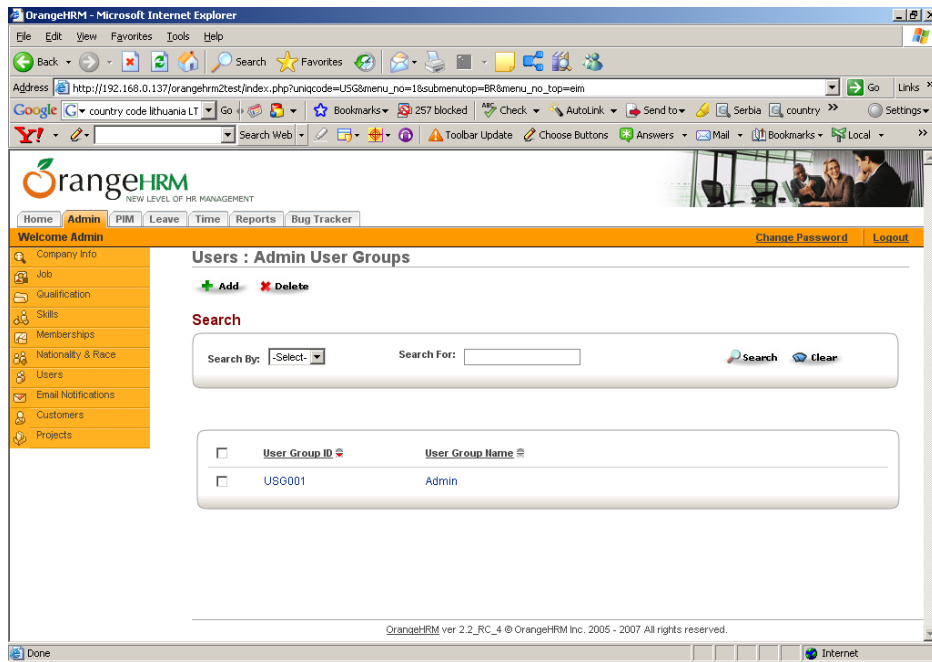


Figure 4.31

#### 4.7.3.1 Add Admin User Group

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

The screenshot shows the 'Admin User Group' form. At the top, there is a 'Back' button. The form contains the following fields and buttons:

- Code:** USG001
- Name:** Admin (marked with an asterisk \* as required)
- View** button
- User Rights** button
- Edit** button
- Clear** button

At the bottom of the form, there is a note: 'Fields marked with an asterisk \* are required.'

Figure 4.32

##### 4.7.3.1.1 Assigning user rights

Assigning of certain rights and permissions to the users will help manage the security and integrity of the system. Once you will define the new Admin user group, please assign the rights, as described below

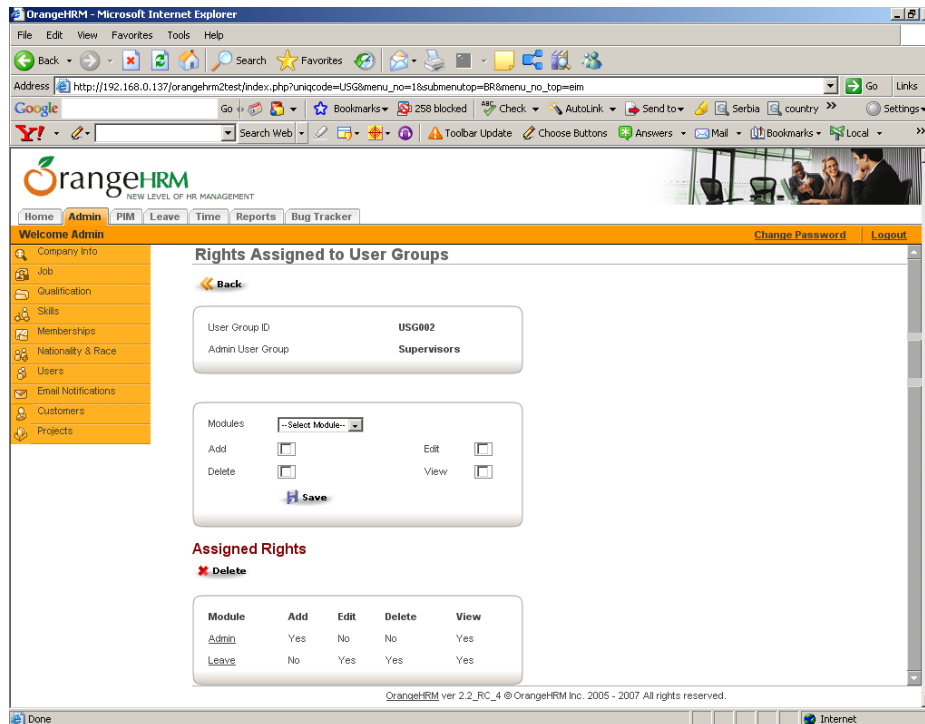


Figure 4.33

10. In the Admin User Groups page, click on the user group to which you wish to assign rights and click on the Assign rights link.
11. Each user group can be assigned with different rights. Click on the required module in the Assigned rights area.
12. Click on the **Edit** button and select the check boxes depending on the rights you wish to assign.
13. Then, click on **Save** button
5. Once you have assigned all the necessary rights to the user group – click **Back** button, to return to the User Group definition screen. Your changes will be saved in the system.

### 4.7.3.2 Edit User Group

Click on the User Group ID to be edited. Click on **Edit** button, make the necessary changes to the Description and click **Save** button. If you need to edit the assigned user rights, please read through the next section.

#### 4.7.3.2.1 Editing assigned user rights

**NOTE:** You are not allowed to edit the User Rights for the group, where your log in account belongs.

To edit the assigned rights of the group, click on the link **Assign User Rights**. The following screen will be displayed

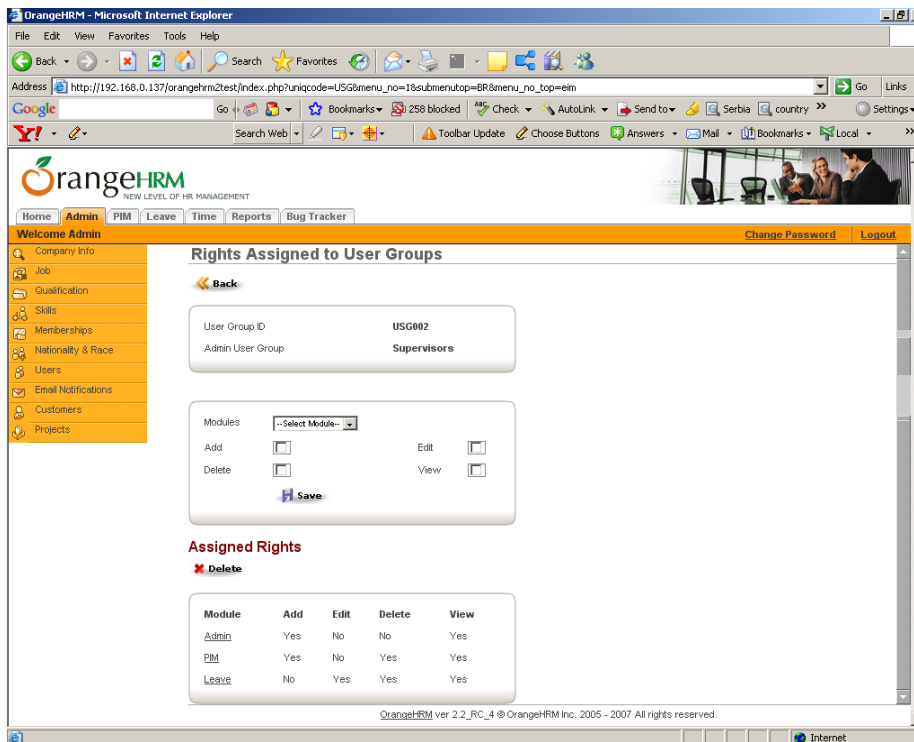


Figure 4.34

To edit the rights for the particular module – select the module from the Assigned Rights list. The information on the rights for the module will be loaded into the section for rights assignment. Click **Edit** button and modify the rights as required.

To deprecated user group of all rights click on **Delete** button.

#### 4.7.3.3 Delete User Group

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

**NOTE:** It is impossible to delete the User group, to which your account belongs.

---

## 4.8 Email notifications

Email notifications section allows setting up the parameters for the operations related to sending and receiving email notifications through OrangeHRM. The section allows performing mail configuration and subscription for the various types of email notifications.


The sub menu consists of the following commands.

- Configuration
- Subscribe

**NOTE:** It is important to specify correct email addresses of the employees, who would like to subscribe for email notifications. The email address setting is performed in the Personal Information Management module Contacts tab - refer Section 5.4.

### 4.8.1 Configuration

Configuration of mail settings is essential if the users of the system require sending and receiving notifications, related to the operations performed within OrangeHRM (for example, Leave management operation, Time sheets administration operations). The Figure 4.35 shows email configuration screen.



The screenshot displays the 'Mail Configuration' interface. It features a form with the following elements:

- Mail Sent As:** A text input field containing 'orangehrm@localhost.'
- Path to Sendmail:** A text input field containing '/usr/lib/sendmail -ti'.
- Sending Method:** A dropdown menu currently showing 'Send Mail'.
- Save:** A button with a blue 'H' icon and the text 'Save'.

Figure 4.35

To configure the mail, specify appropriate values for the fields and click **Save** button.

### 4.8.2 Subscribe

This sub menu section will allow you to subscribe users for receiving email notifications through OrangeHRM system.

---

### Subscribe to E-mail Notifications

E-mail

Leave Applications  
 Leave Approvals  
 Leave Cancellations  
 Leave Rejections

Figure 4.36

Enter the correct email address and select the types of notifications the user would like to receive by clicking the appropriate checkboxes. Click **Save** button.

## 4.9 Customers

This section of the menu allows define and store in the system basic information on the customers and clients of the company.

The list of the existing customers being displayed as shown on the Figure 4.37. A search can be performed on Customers based on Customer ID or Customer Name.

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

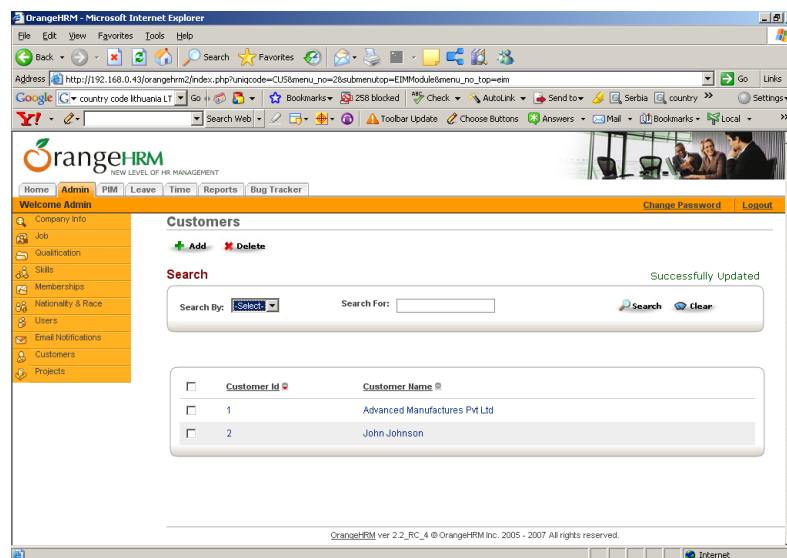
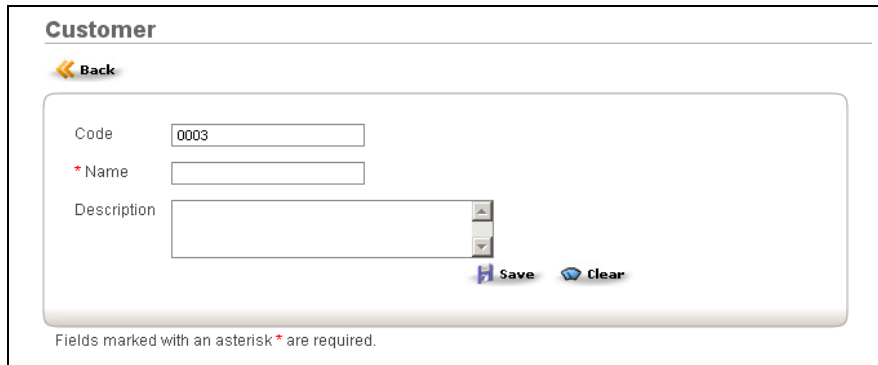


Figure 4.37

---

### 4.9.1 Add Customer

To add the new customer into the system, click **Add** button in the Customers page. The page used to add a Customer is displayed in Figure 4.38



The screenshot shows a web form titled "Customer". At the top left, there is a "Back" button with a left-pointing arrow. Below it, there are three input fields: "Code" containing the text "0003", "\* Name" (with an asterisk indicating it is required), and "Description". To the right of the "Description" field are three small vertical icons. At the bottom right of the form area, there are "Save" and "Clear" buttons. Below the form area, a small text note reads "Fields marked with an asterisk \* are required."

Figure 4.38

14. Code is automatically generated.
15. Enter the Customer Name (It can be the name of company / organization or individual). You can also enter company's internal customers.
3. Description – the description and comments about the customer

Click on the **Save** button. If the save is successful, the newly added customer is displayed with a 'Successfully Added' Notification in the Customer page.

### 4.9.2 Edit Customer

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

### 4.9.3 Delete Customer

This would enable the user to delete the customer. Click on the checkbox against the Customer ID to be deleted and click **Delete** button. Multiple Customers could be deleted simultaneously.

**NOTE:** It is impossible to delete customer if there are any projects (Section 4.10) or any time events (Section 8.1) associated with this customer

---

## 4.10 Projects

The administrators are able to define the projects, which were / are / will be managed by the company. The list of the existing projects being displayed as shown on the Figure 4.39. A search can be performed on Customers based on Project ID or Project Name.

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

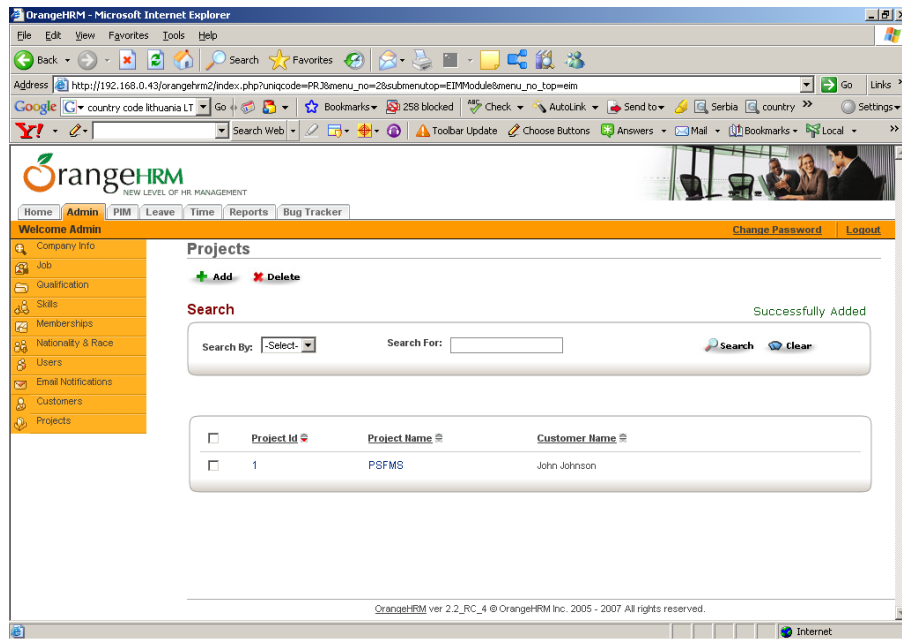


Figure 4.39

### 4.10.1 Add Project

To add the new project into the system, click **Add** button in the Projects page. The page used define new Project is displayed in Figure 4.40

**NOTE:** Enter the Customer of the Project information into the system prior to adding Project information. See Section 4.9 for more information.

---

**Project**

[Back](#)

Code

\* Customer Name

\* Name

Description

Fields marked with an asterisk \* are required.

Figure 4.40

16. Code is automatically generated.
17. Select the Customer Name from the drop down list. Only the customers that have been entered in to the system will appear in the list.
3. Enter the Name for the project.
4. Description – the description and comments about the customer

Click on the **Save** button. If the save is successful, the newly added project is displayed with a 'Successfully Added' Notification in the Project page.

### 4.10.2 Edit Project

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

### 4.10.3 Delete Project

This would enable the user to delete the project. Click on the checkbox against the Project ID to be deleted and click **Delete** button. Multiple Projects could be deleted simultaneously.

**NOTE:** It is impossible to delete project if there are time events (Section 8.1) associated with this project.

---



---

# Chapter 5

## 5 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. Picture of employee is included as well. Information captured in this module is utilized by all other modules, thus eliminating data redundancy.

### 5.1 PIM Module - Employee Information

To access, select **PIM Module** from the top menu. This first screen will show a list of the employees entered. See figure 5.1 below.

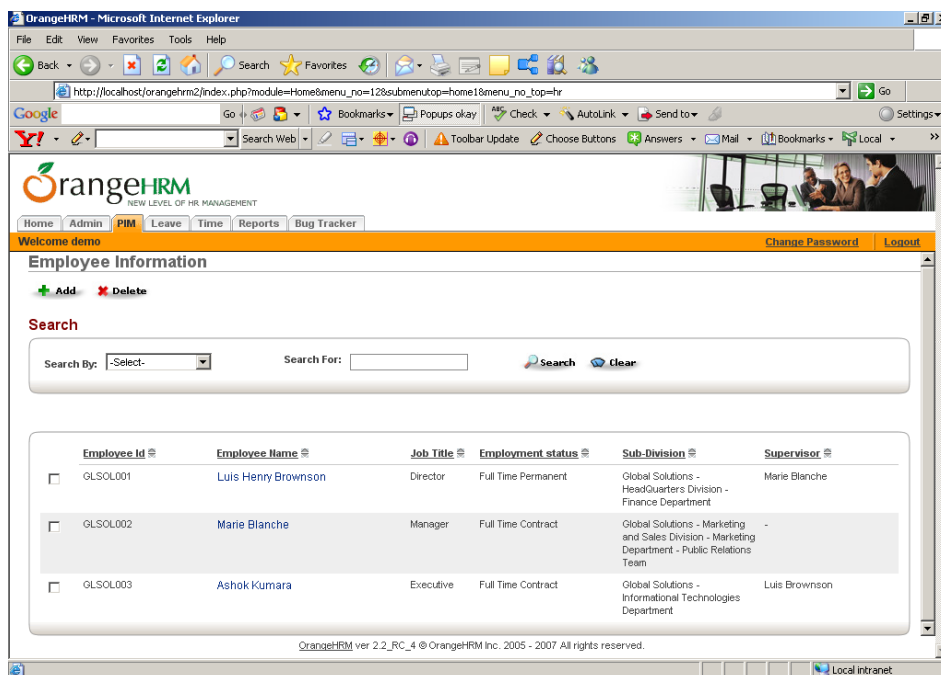


Figure 5.1

If you haven't entered any employees yet you need to add one before you can start using the PIM Module. See part 5.1.1 below on Adding employee. If employees are already entered you can access their details by clicking on ID.

A search can be done on Employees based on Employee ID, First Name, Last Name, Middle Name, Job Title, Employment Status, Sub-Division, Supervisor.

---

---

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

### 5.1.1 Add Employee to the PIM module

A new employee is added to the system using the Employee Information Page. Click on the **Add** button shown in Figure 5.2.

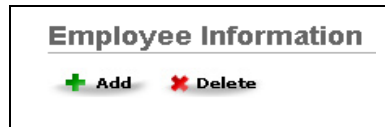


Figure 5.2

Then the following screen will be displayed.

The image shows a form titled "Employee Information" with a rounded rectangular border. Inside the form, there are several input fields: "Code" with the value "009", "\* Last Name", "\* First Name", "Middle Name", "Nick Name", and "Photo". A "Browse..." button is next to the "Photo" field. Below the input fields, there is a note: "Fields marked with an asterisk \* are required." At the bottom of the form, there are three buttons: "Back" with a left arrow, "Save" with a floppy disk icon, and "Reset" with a red circle and minus sign icon.

Figure 5.3

Enter details and click the **Save** button.

18. Employee ID is automatically generated.
19. Enter First Name
20. Enter Last Name
21. Enter Middle Name (Optional)
22. Enter Nick Name (Optional)
23. Attach Photo (Optional)

**NOTE:** The attached photo size should not exceed 1MB

---

**NOTE:** The remaining details such as personal information, job information etc. can be entered after clicking **Save** or by clicking on the relevant EmployeeID on the relevant pages (For this, the particular employee should have been entered prior to entering such information).

## 5.2 PIM Module - Main interface

When either clicking on the Employee ID of an employee already created or clicking **Save** when adding a new employee, you will enter the main interface of the PIM Module. The **PIM Module** menu is displayed below

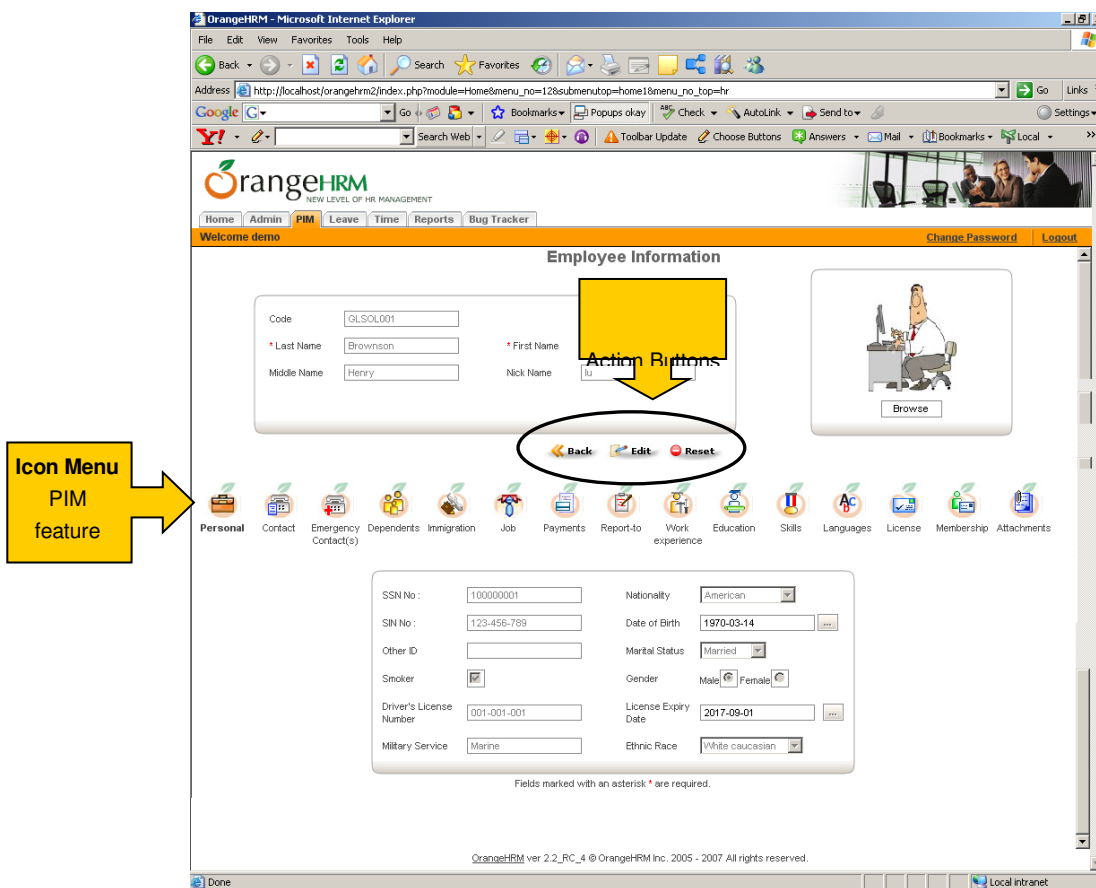


Figure 5.4

The icon menu in the middle of the screen shows all the features for entering info in the PIM Module. This is categorised into the following areas:

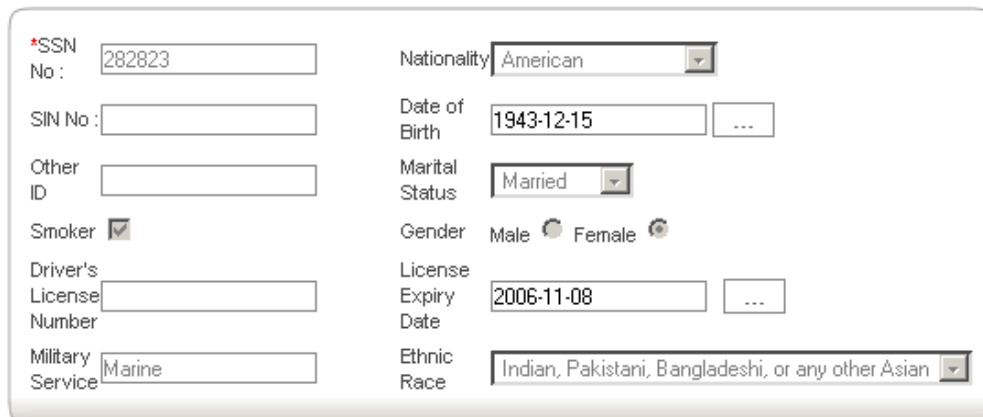
- Personal
- Contact

- 
- Emergency contact(s)
  - Dependants
  - Immigration
  - Job
  - Payments
  - Report-to
  - Work experience
  - Education
  - Skills
  - Languages
  - Licenses
  - Membership
  - Attachments

Each category is described below.

## 5.3 Personal

To access personal information click on the **Personal** icon in the icon menu in the middle of the screen. Below the icon menu you will then see the fields shown in Figure 5.5 below.



The screenshot shows a personal information form with the following fields and values:

*SSN No:	282823	Nationality:	American
SIN No:		Date of Birth:	1943-12-15
Other ID:		Marital Status:	Married
Smoker:	<input checked="" type="checkbox"/>	Gender:	Male <input type="radio"/> Female <input checked="" type="radio"/>
Driver's License Number:		License Expiry Date:	2006-11-08
Military Service:	Marine	Ethnic Race:	Indian, Pakistani, Bangladeshi, or any other Asian

Fields marked with an asterisk \* are required.

Figure 5.5

Use the action buttons **Edit/Save** above the Icon menu to edit and save the information.

---

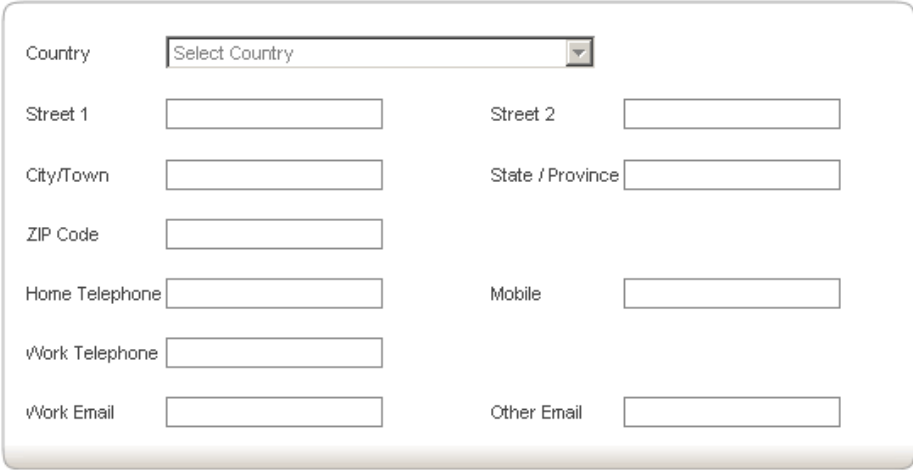
---

The Nationality box contains the nationalities which have been entered in the Admin Module.

The Ethnic Races box contains the ethnic races which have been entered in the Admin Module.

## 5.4 Contact

To access the contact information click on the **Contact** icon in the icon menu in the middle of the screen. Bellow the icon menu you will then see the fields shown in Figure 5.6 below.



The screenshot shows a contact information form with the following fields:

Country	<input type="text" value="Select Country"/>		
Street 1	<input type="text"/>	Street 2	<input type="text"/>
City/Town	<input type="text"/>	State / Province	<input type="text"/>
ZIP Code	<input type="text"/>		
Home Telephone	<input type="text"/>	Mobile	<input type="text"/>
vWork Telephone	<input type="text"/>		
Work Email	<input type="text"/>	Other Email	<input type="text"/>

Figure 5.6

Use the action buttons **Edit/Save** above the Icon menu to edit and save the information.

## 5.5 Emergency contact(s)

To access the emergency contact(s) information, click on the **Emergency Contact(s)** icon in the icon menu in the middle of the screen. Bellow the icon menu you will then see the fields shown in Figure 5.7 below.

---

Name  Relationship

Home Telephone  Mobile

Work Telephone

Save

Delete

	Name	Relationship	Home Telephone	Mobile	Work Telephone
<input type="checkbox"/>	<u>Bob Hope</u>	Uncle	548 5846123		

Figure 5.7

Enter the information to the emergency contact and click the **Save** button. The emergency contact will then appear at the bottom as the example showed in the figure above. You can enter an unlimited number of emergency contacts

To edit the emergency contacts, simply click on the name, do the changes and click on the **Save** button.

To delete an emergency contact click in the check box and then click on the **Delete** button.

## 5.6 Dependants

To access the dependent information click on the **Dependants** icon in the icon menu. you will then see the fields shown in Figure 5.8.

**Dependents**

Name

Relationship  Save

Delete

	Name	Relationship
<input type="checkbox"/>	<u>Lisie</u>	wife

**Children**

Name

Date of Birth

Save

Delete

	Name	Date of Birth
<input type="checkbox"/>	<u>Mathew</u>	2007-02-01

Figure 5.8

---

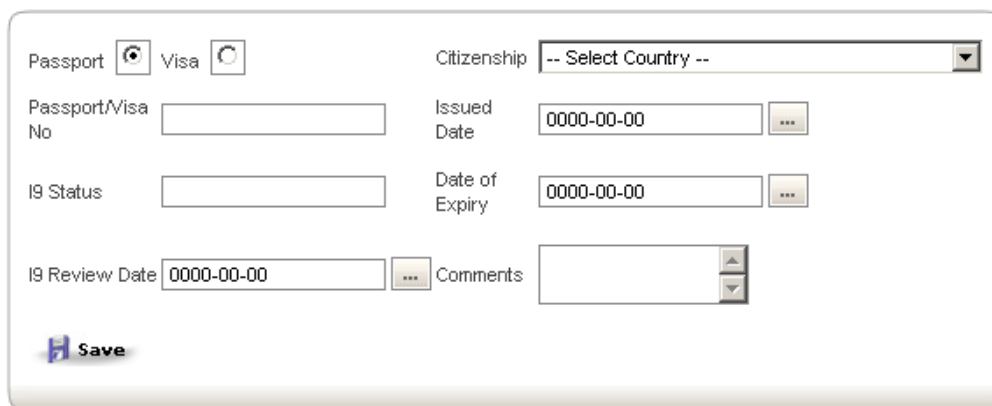
Enter the information of the Dependants/ Children and click the **Save** button. The Dependants/ Children contact will then appear.

To edit the Dependants/ Children info, simply click on the name, do the changes and click on the **Save** button.

To delete Dependants/ Children from the list, click on the check box and then click on the **Delete** button.

## 5.7 Immigration

To access the immigration information click on the **Immigration** icon. You will then see the fields shown in figure 5.9.



The screenshot shows a web form for entering immigration details. At the top left, there are two radio buttons: 'Passport' (selected) and 'Visa'. To the right is a dropdown menu for 'Citizenship' with the text '-- Select Country --'. Below these are several input fields: 'Passport/Visa No' (text), 'Issued Date' (date, pre-filled with '0000-00-00'), 'I9 Status' (text), 'Date of Expiry' (date, pre-filled with '0000-00-00'), 'I9 Review Date' (date, pre-filled with '0000-00-00'), and 'Comments' (text area). A 'Save' button is located at the bottom left of the form.

Figure 5.9

Select if it is either Passport or Visa in from the upper left corner, enter the information and click the **Save** button. The Passport / Visa information will then appear.

To edit the Passport / Visa info, simply click on the Passport / Visa column, do the changes and click on the **Save** button.

To delete Passport / Visa from the list, click on the tick box and then click on the **Delete** button.

## 5.8 Job

To access the job information click on the **Job** icon .You will then see the fields shown in figure 5.10.

---

---

Job Title

EEO Category

Joined Date

Employment Status

Sub-division

---

[Hide employee contracts](#)

### Employee Contracts

Contract Extension Start Date

Contract Extension End Date

**Save**

### Assigned Contracts

**Delete**

	Contract Extension ID	Contract Start Date	Contract End Date
<input type="checkbox"/>	1	2005-04-01	2008-04-01

Figure 5.10

Use the action buttons **Edit/Save** above the Icon menu to edit and save the job information

- Job Titles entered into the system by Administrator will be loaded in the drop down list
- Employment Statuses entered into the system by Administrator will be loaded in the drop down list
- EEO categories entered into the system by Administrator will be loaded in the drop down list
- Sub – division can be selected for the employee from the Company Structure information, which is displayed after clicking **Browse (...)** button
- The Joined Date can be selected from the calendar.

## 5.8.1 Employee Contracts

User can select to Show/Hide Employee Contracts (contract extensions)

Enter the contract extension start and end date and click the **Save** button. Then Assigned Contracts will appear.

To edit the contract info, simply click on the Contract Extension ID, do the changes and click on the **Save** button.

---



---

To delete a contract from the list, click in the tick box and then click on the **Delete** button.

## 5.9 Payments

To access the payments information click on the **Payments** icon. You will then see the fields shown in figure 5.11 below.

The screenshot shows a form with the following fields and controls:

- Pay Grade**: A text input field.
- Director Pay Grade**: A text input field.
- Currency**: A dropdown menu with "-- Select Currency --" selected.
- Minimum Salary**: A text input field containing "-N/A-".
- Maximum Salary**: A text input field containing "-N/A-".
- Basic Salary**: A text input field.
- Save**: A button with a floppy disk icon.
- Assigned Salary**: A section header in red.
- Delete**: A button with a red 'X' icon.
- Table**: A table with two columns: "Currency" and "Basic Salary". It contains one row with a checkbox, "United States Dollar", and "85000".

Figure 5.11

Enter the information of the payment by selecting currency, entering basic salary and then clicking the **Save** button. The payment will then appear under assigned salary as the example shown in figure 5.11.

- The minimum and maximum salary will be loaded into the system according to the selected Pay Grade.

To edit an assigned salary, simply click on the currency type, do the changes and click on the **Save** button.

To delete an assigned salary from the list, click in the tick box and then click on the **Delete** button.

## 5.10 Report-to

We assigned supervisors or subordinates using this menu.

To access the report-to information click on the **Report-to** icon . You will then see the fields shown in figure 5.12 .

---

---

Supervisor / Subordinate

Employee Name

Reporting Method

Select ▼

...

Select Method ▼

**Save**

**Supervisors**

i.e. Current Employee's Supervisors

**✖ Delete**

	Employee Id	Employee Name	Reporting Method
<input type="checkbox"/>	<u>GLSOL002</u>	Marie Blanche	Direct

**Subordinates**

i.e. Current Employee's Subordinates

**✖ Delete**

	Employee Id	Employee Name	Reporting Method
<input type="checkbox"/>	<u>GLSOL003</u>	Ashok Kumara	Direct

Figure 5.12

Enter the information of the Supervisor / Subordinate and click on the **Save** button . The Supervisor / Subordinate info will then appear .

To edit the Supervisor / Subordinate info, simply click on the Employee ID, do the changes and click on the **Save** button.

To delete a Supervisor / Subordinate from the list, click in the tick box and then click on the **Delete** button.

## 5.11 Work experience

To access the work experience information click on the **Work experience** icon in the icon menu in the middle of the screen. Below the icon menu you will then see the fields shown in figure 5.13 below.

---

---

Employer

Job Title

Comments

Start Date

End Date

Internal

### Assigned Work Experience

+ Add
✖ Delete

	Work Experience ID	Employer	Job Title	Start Date	End Date	Internal
<input type="checkbox"/>	1	New Company	Accountant	1998-01-07	2000-02-01	
<input type="checkbox"/>	2	Your accountant	Accounting Manager	1995-09-07	1997-11-11	

Figure 5.13

Enter the work experience info and click on the **Save** button below the fields. The work experience info will then appear below the fields.

To edit the work experience info, simply click on the Work Experience ID, do the changes and click on the **Save** button. If you want to cancel the operation and add a new work experience instead, click on the **Add** button.

To delete a work experience from the list, click in the tick box and then click on the **Delete** button.

## 5.12 Education

To access the education information click on the **Education** icon . You will then see the fields shown in figure 5.14.

---

---

Education: --Select Education--

Major/Specialization:

Year:

GPA/Score:

Start Date: 0000-00-00

End Date: 0000-00-00

**Assigned Education**

	Education	Year	GPA/Score
<input type="checkbox"/>	BSC, UOC	2005	

Figure 5.14

Enter the information of the education and click the **Save** button . The education will then appear at the bottom under Assigned Education as the example shown in the figure above.

- The Education field contains the education info specified in the Admin module.

To edit the education history, simply click on the education name, do the changes and click on the **Save** button.

To delete an education click in the tick box and then click on the **Delete** button.

## 5.13 Skills

To access the skills information click on the **Skills** icon .Bellow the icon menu you will then see the fields shown in figure 5.15 below.

---

---

	Skill	Years of Experience
<input type="checkbox"/>	Programming JAVA	3

Figure 5.15

Enter the skill info and click on the **Save** button below the fields. The skill will then appear below the fields under assigned skills as shown in the figure above.

- The Skill shall be selected from the drop down list. The list will be populated with the values, specified in the Admin Module.

To edit the skill info, simply click on the skill name, do the changes and click on the **Save** button. If you want to cancel the operation and add a new skill instead, click on the **Add** button.

To delete a skill from the list, click in the tick box and then click on the **Delete** button.

## 5.14 Languages

To access the language information click on the **Language** icon in the icon menu in the middle of the screen. Below the icon menu you will then see the fields shown in figure 5.16 below.


---

---

Language --Select Language-- ▾

Area Of Competence --Select Fluency-- ▾

Competency ---Select Rating--- ▾

 **Save**

**Assigned Languages**

+ **Add**    x **Delete**

	Language	Area Of Competence	Competency
<input type="checkbox"/>	<a href="#">English</a>	Writing	Good
<input type="checkbox"/>	<a href="#">English</a>	Speaking	Mother Tongue
<input type="checkbox"/>	<a href="#">English</a>	Reading	Good
<input type="checkbox"/>	<a href="#">French</a>	Writing	Basic
<input type="checkbox"/>	<a href="#">French</a>	Speaking	Basic
<input type="checkbox"/>	<a href="#">French</a>	Reading	Good

Figure 5.16

Enter the language info and click on the **Save** button below the fields. The language will then appear below the fields under assigned languages as shown in the figure above.

- The language shall be selected from the drop down list. The list will be populated with the values, specified in the Admin Module.

To edit the language info assigned, simply click on the language name, do the changes and click on the **Save** button. If you want to cancel the operation and add a new language instead, click on the **Add** button.

To delete a language from the list, click in the tick box and then click on the **Delete** button.

## 5.15 Licenses

To access the license information click on the **Licenses** icon in the icon menu in the middle of the screen. Below the icon menu you will then see the fields shown in figure 5.17 below.

---

---

License Type: --Select License Type--

Start Date: 0000-00-00

End Date: 0000-00-00

**Save**

**Assigned Licenses**

**+ Add** **- Delete**

	License Type	Start Date	End Date
<input type="checkbox"/>	<a href="#">License A</a>	2006-11-01	2007-03-10

Figure 5.17

Enter the license info and click on the **Save** button below the fields. The license will then appear below the fields under assigned licenses as shown in the figure above.

- The license shall be selected from the drop down list. The list will be populated with the values, specified in the Admin Module.

To edit a license assigned, simply click on the license name, do the changes and click on the **Save** button. If you want to cancel the operation and add a new license instead, click on the **Add** button.

To delete a license from the list, click in the tick box and then click on the **Delete** button.

## 5.16 Memberships

To access the membership information click on the **Memberships** icon. You will then see the fields shown in figure 5.18.

Membership Type: -- Select Membership Type --

Membership: -- Select Membership --

Subscription Ownership: -- Select Ownership --

Subscription Amount: [Text Input]

Subscription Commence Date: 0000-00-00

Subscription Renewal Date: 0000-00-00

**Save**

Figure 5.18

---

---

Enter the membership info and click on the **Save** button below the fields. The membership will then appear below the fields under assigned memberships.

- The Membership Type and Membership fields are related. The lists are being populated with the values of membership types and memberships entered in the Admin module.

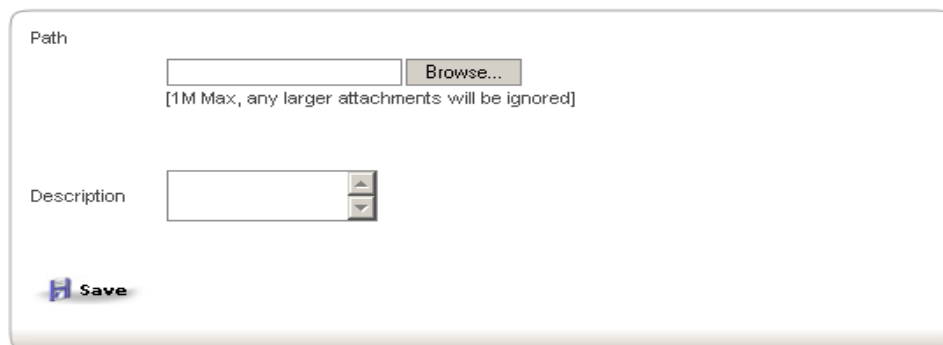
To edit a membership assigned, simply click on the membership name, do the changes and click on the **Save** button. If you want to cancel the operation and add a new membership instead, click on the **Add** button.

To delete a membership from the list, click in the tick box and then click on the **Delete** button.

## 5.17 Attachments

To access attachments click on the **Attachments** icon. You will then see the fields shown in figure 5.19.

**NOTE:** The size of the attached files can not exceed 1MB.



The screenshot shows a form with the following elements:

- Path:** A text input field followed by a "Browse..." button. Below the field is the text "[1M Max, any larger attachments will be ignored]".
- Description:** A text input field with a vertical scroll bar on the right side.
- Save:** A button with a floppy disk icon and the text "Save".

Figure 5.19

Select a path for the attachment, enter a description and then click on the **Save** button. Then assigned attachments will appear.

To access an attachment simply click on the file name, and then click on the button saying **Show file**. If you want to cancel the operation and add a new attachment instead, click on the **Add** button.

To delete an attachment from the list, click in the tick box and then click on the **Delete** button.

---



---

## Chapter 6

# 6 ESS Module

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

The functionality of this module spans through the entire system, making information available anywhere, anytime. Of course all information is subject to company defined security policy, where everyone can only view the information he/she is authorized to. Time and cost saving effects from this solution are tremendous.

To use the ESS module the Employee has to be created and added as an ESS User through the User function in the Admin Module. See part 4.7.2 for further information on creating the ESS user.

To login to the ESS module, enter the username and password which were selected when creating the user.

After logging in, the ESS user can access the menu shown in the figure below.

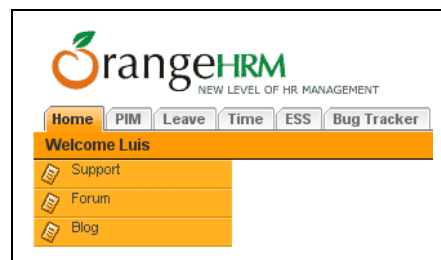


Figure 6.1

- **ESS** – Through this the employee can access and edit his/hers personal information of the PIM Module. See part 5 for further information on these functions.
  - **Leave Module** – Through this the employee can apply for leave to a supervisor and approve reject leave for a subordinate. See part 7 for further information on these functions.
  - **Time Module** – Through this module employee can enter and submit the time sheets for the approval by supervisor. See part 8 for further information.
  - **Bug Tracker** – Through this the employee can report bugs encountered when using the system. See part 10 for further information on this.
-

---

# Chapter 7

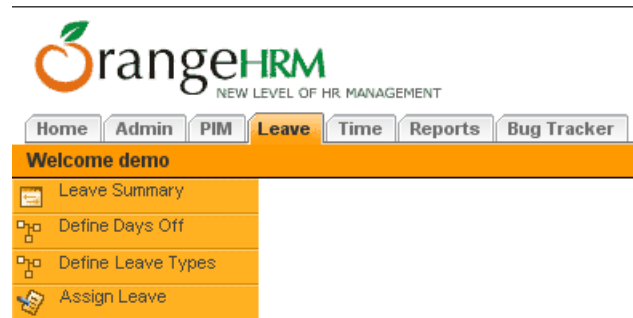
## 7 Leave Module

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 of the system. The Leave module will be described from the perspective of Administrator, ESS User – Supervisor (the user who has subordinates, see section 5.10 for more information) and the ESS User (the user who does not have subordinates assigned)

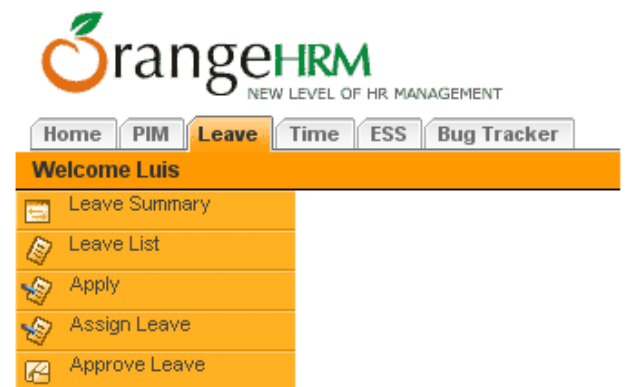
The **HR Admin** can:

- View Leave Summary for each employee and entitle leave days of each available type
- Define Days Off – Weekends and Specific Holidays
- Define Leave Types
- Assign Leave for any employee



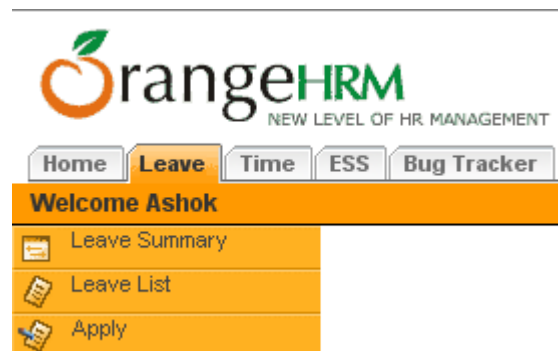
The **ESS User – Supervisor** can:

- View the Personal or Employee (subordinate) Leave Summary
- View the Leave List – the detailed leave information
- Apply for Leave
- Assign Leave for his/her subordinates
- Approve/Reject leave



The **ESS User** can:

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



---

# 7.1 Leave Summary

## 7.1.1 Administrator views Leave Summary

To view leave summary click **Leave Summary** from the left side menu. The screen, shown in the Figure 7.1 will be displayed.

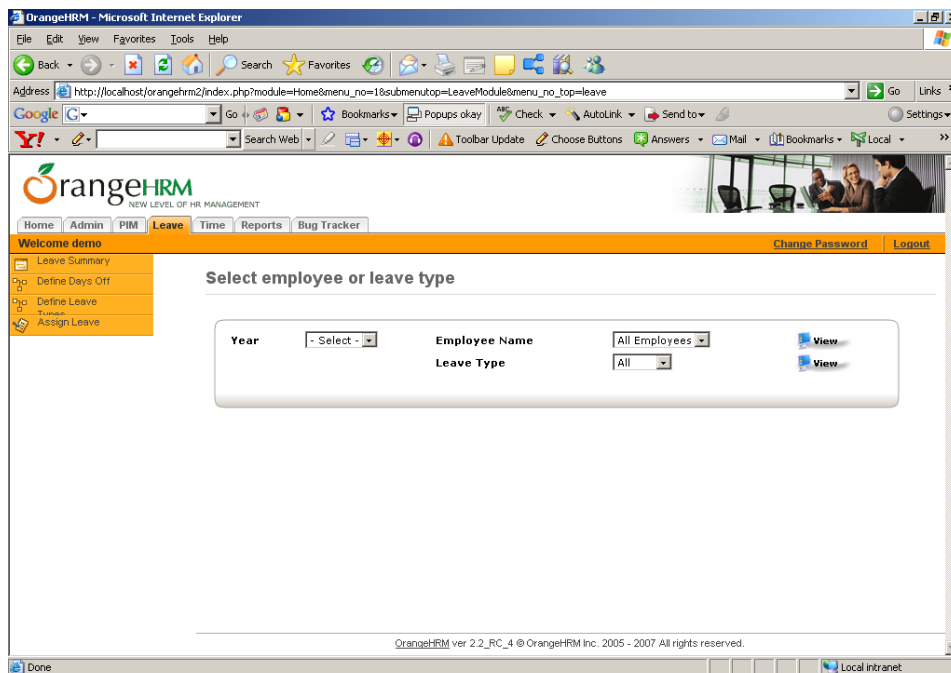


Figure 7.1

The leave summary of the employees can be viewed for one particular year, therefore the year must be selected from the drop down list.

There are two criteria which can be used to filter the leave summary that can be generated:

- Employee Name
- Leave Type

If the user wants to view the Leave summary for one employee, the **Employee Name** shall be selected. The Employee Name drop down list has two options “All Employee” and “Select”. Once **Select** is chosen, user can browse through the employees (Figure 7.2), who have already been entered into the system and select the particular employee. It is possible to search for Employee within the Employee list by Employee ID or Employee Name.

---

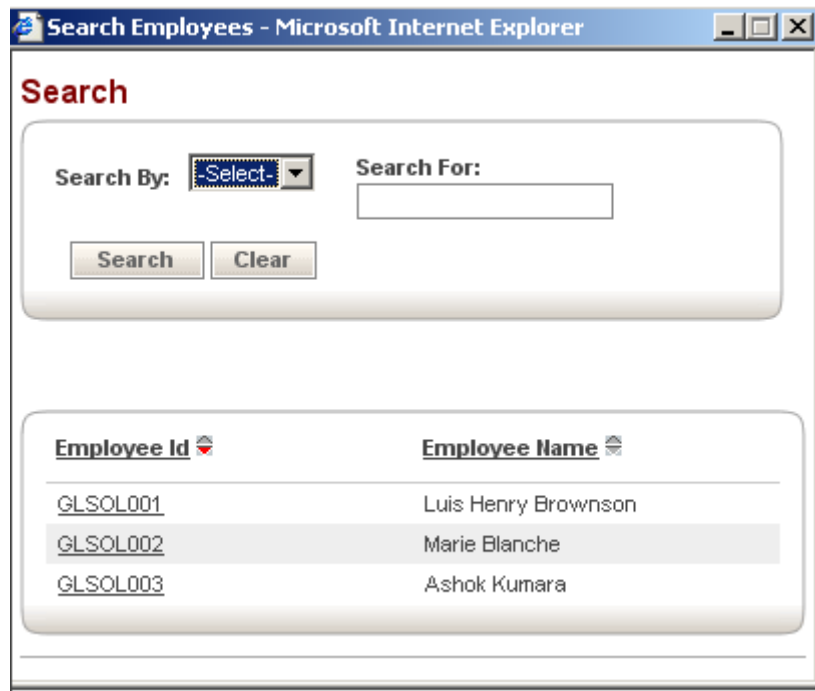


Figure 7.2

To filter the Leave Summary by particular leave type, user must select it from the Leave Type drop down list. The list is populated with the values which have been entered into the system through Define Leave Type functionality (refer section 7.1.3 for more information).

### 7.1.1.1 View Leave Summary

To view all or filtered Leave Summary information, the user must click **View** button.

#### 7.1.1.1.1 Edit Entitled Leave information through Leave Summary

The Administrator can edit the Entitled Leave information by pressing the **Edit** button. The screen shown in the Figure 7.3 will be displayed. The appropriate leave information should be edited and saved into the system by pressing **Save** button.

Leave Summary for 2007				
Employee Name	Leave Type	Leave Entitled	Leave Taken	Leave Available
Luis Brownson	Casual	10	0	10
Luis Brownson	Sick	12	3	9
Marie Blanche	Casual	20	0	20
Marie Blanche	Sick	12	0	12
Ashok Kumara	Casual	15	1	14
Ashok Kumara	Sick	15	0	15

Figure 7.3

---

## 7.1.2 Supervisor views Leave Summary

The ESS User who has been assigned subordinate employees can view their leave summary. The supervisor can view:

- Personal Leave Summary
- Employee Leave Summary

### 7.1.2.1 Personal Leave Summary

**Personal Leave Summary** Sub-menu of the left side menu item **Leave Summary** will allow Supervisor to view his/her leave summary information. For more detail please, refer to section 7.1.3.

### 7.1.2.2 Employee Leave Summary

The Supervisor can view the leave summary information for his/her subordinates. In order to do this, click the **Employee Leave Summary** sub-menu in the left side menu item **Leave Summary**. The screen displayed in the Figure 7.4.



Select employee or leave type

Year    - Select -    Employee Name    -Select-    [View](#)

Figure 7.4

To view the leave summary, you must select the year from the drop down list. if you want to display summary of one Employee select him/her in the Employee Name drop down list and press the **View** button. The screen displayed in the Figure 7.5.



Leave Summary for Luis Brownson for 2007

Leave Type	Leave Taken	Leave Available
Casual	0	10
Sick	3	9

Figure 7.5

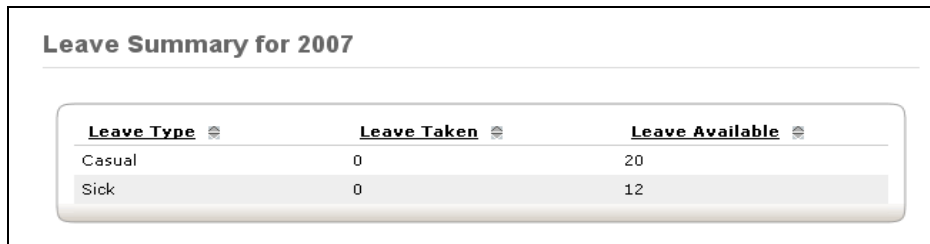
---

---

**NOTE:** To be able to view the summary information on the subordinates, the appropriate employees' information and "Report-to" relationship must be entered into the system.

### 7.1.3 ESS User views Leave Summary

By clicking on **Leaves Summary** (for ESS Users) and **Personal Leave Summary** (for Supervisors) the ESS user can view a list of the leave types and get a summary of the leave taken the leave available as shown in the screen in Figure 7.6 below



Leave Type	Leave Taken	Leave Available
Casual	0	20
Sick	0	12

Figure 7.6

## 7.2 Define Days Off

By selecting Define Days Off from the left side menu of the system, administrator of OrangeHRM can define the days off that will be applicable to the entire company and will be taken into consideration while calculating leave duration.

Days off have been classified into:

- Weekends
- Specific Holidays

### 7.2.1 Weekend

The screen used for defining weekends for the company is displayed in the Figure 7.7. For each day of the week the administrator shall specify whether it is **Full** or **Half** working day or **Weekend**. After specifying the information, it should be saved by clicking **Save** button.

---

**Define Days Off : Weekend**

Monday	Full Day
Tuesday	Full Day
Wednesday	Full Day
Thursday	Full Day
Friday	Full Day
Saturday	Weekend
Sunday	Weekend

Save

Figure 7.7

## 7.2.2 Specific Holidays

The specific holidays that will not be considered as company’s working days can be defined through this module.

With the Specific Holidays feature you can add, delete and edit Specific holidays to match the requirements and policies of your company. Start by clicking on **Specific Holidays** under the **Define Days Off** item from the left side menu.

The list of the specific holidays is being displayed as shown in Figure 7.8.

**Define Days Off : Specific Holidays**

+ Add    ✖ Delete

<input type="checkbox"/>	Name of Holiday	Date	Full Day/Half Day
<input type="checkbox"/>	<a href="#">New Year Day</a>	2007-01-01	Full Day
<input type="checkbox"/>	<a href="#">Birthday of Martin Luther King, Jr.</a>	2007-01-15	Full Day
<input type="checkbox"/>	<a href="#">Washingtons Birthday</a>	2007-02-19	Full Day
<input type="checkbox"/>	<a href="#">Independence Day</a>	2007-07-04	Full Day
<input type="checkbox"/>	<a href="#">Labor Day</a>	2007-09-03	Full Day
<input type="checkbox"/>	<a href="#">Columbus Day</a>	2007-10-08	Full Day
<input type="checkbox"/>	<a href="#">Thanksqiving Day</a>	2007-11-22	Full Day

Figure 7.8

### 7.2.2.1 Add Specific Holidays

To add a Specific holiday click **Add** from and the screen shown in figure below 7.9 will appear.

---

Figure 7.9

It is compulsory to specify the Name of the Holiday and to select the date when the holiday occurs.

By default all holidays are marked as non-recurring. To mark holiday as recurring, meaning that the holiday will occur on the same day next year, click the Recurring check box. For example, Christmas is recurring holiday, as every year it happens on the 25<sup>th</sup> of December. Easter is not recurring holiday.

It is also possible to specify, whether the holiday is full or half day.

After finishing click **Save**. If the save is successful, the list of the Specific Holidays will be displayed with a 'Successfully Added' Notification.

### 7.2.2.2 Edit Specific Holiday

Click on the link with the name of Specific holiday that needs to be edited. Click **Edit**, make the necessary changes and click **Save**.

### 7.2.2.3 Delete Specific Holiday

This would allow the user to delete Specific Holiday. Click on the checkbox against the Name of the holiday to be deleted and click **Delete** button. Multiple holidays can be deleted simultaneously.

## 7.3 Define Leave Types

Through this section the administrator of the system will be able to define leave types, which are compatible with the HR policies of the company. Start by clicking on **Define Leave Types** item from the left side menu.

The list of the specific holidays is being displayed as shown in Figure 7.10.

---



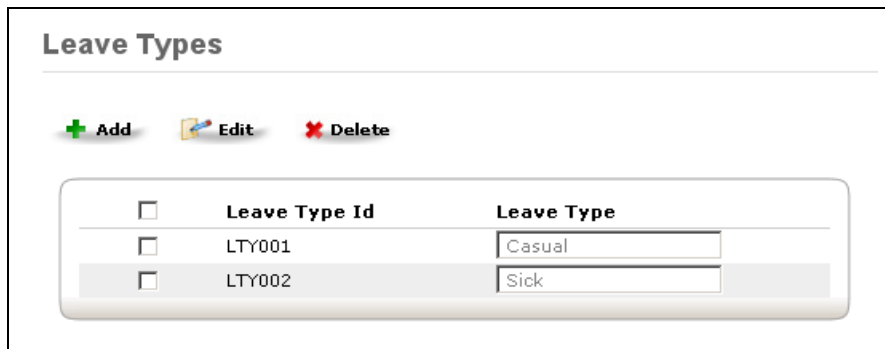


Figure 7.10

### 7.3.1.1 Add Leave Type

To add a Leave Type click **Add** from and the screen shown in figure below 7.11 will appear.

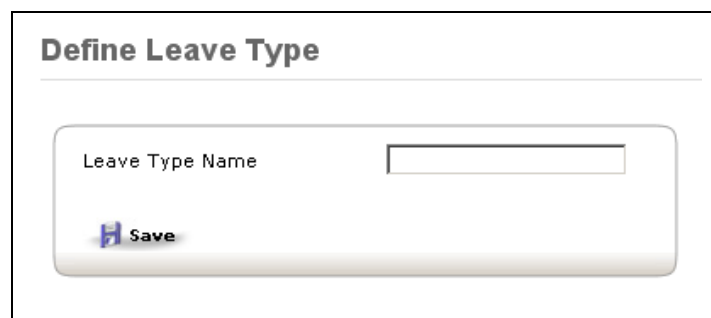


Figure 7.11

Enter the leave type name and click **Save**. If the save is successful, the list of the Leave Types will be displayed with a 'Successfully Added' Notification.

**NOTE:** The entitlement of leave of each type for the employees is performed through the Leave Summary section. The functionality is explained in the 7.1.1.1.1 section

### 7.3.1.2 Edit Leave Type

Click on the **Edit** button above the list of the Leave Types. It enables you to edit all the leave type names. Make the necessary changes and click **Save**.

### 7.3.1.3 Delete Leave Type

This would allow the user to delete Leave Type. Click on the checkbox against the Leave Type to be deleted and click **Delete** button. Multiple leave types can be deleted simultaneously.

---

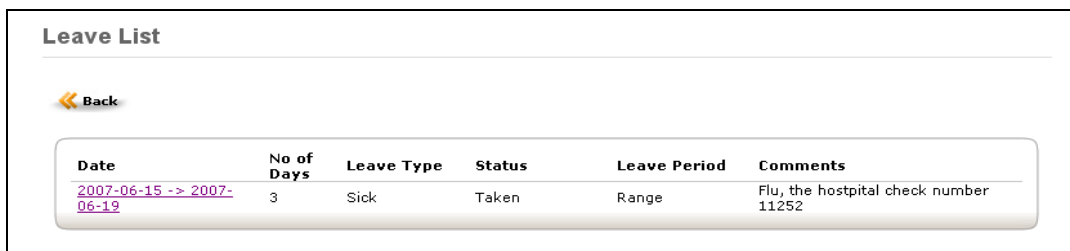
---

## 7.4 Leave List

Leave List provides the detailed information about the leaves information for the particular employee or his/her subordinates.

### 7.4.1 View Leave List

To view leave list information, employee must be logged in as ESS user. Click the Leave List menu item from the left side menu and the following information will be displayed, as shown in Figure 7.12



Date	No of Days	Leave Type	Status	Leave Period	Comments
<a href="#">2007-06-15 -&gt; 2007-06-19</a>	3	Sick	Taken	Range	Flu, the hospital check number 11252

Figure 7.12

- Date or the range of dates the leave was applied for
- No of days – the figure calculated excluding weekends and defined specific holidays
- Status - Pending approval / approved / rejected / taken
- Leave period – single or range
- Comments

The information is being displayed for all the leaves the employee has applied for or has been assigned.

To view the detailed information on the leave, the user must click on the link with the leave dates.

The following screen displayed in Figure 7.13 will be shown.

---

**Leave List**

[← Back](#)

Date	Leave Type	Status	Full Day/Half Day	Comments
Friday, Jun 15, 2007	Sick	Taken	Full Day	Flu, the hospital check number 11252
Saturday, Jun 16, 2007	Sick	Taken	----	Flu, the hospital check number 11252
Sunday, Jun 17, 2007	Sick	Taken	----	Flu, the hospital check number 11252
Monday, Jun 18, 2007	Sick	Taken	Full Day	Flu, the hospital check number 11252
Tuesday, Jun 19, 2007	Sick	Taken	Full Day	Flu, the hospital check number 11252

Figure 7.13

To go back to the Leave List, click **Back** button.

### 7.4.2 Edit Leave Statuses

This functionality can be used by ESS Users to change the leave statuses from **Pending Approval** or **Approved** to **Cancelled**. In other words, this section allows employees to cancel the leaves they have applied for or the leaves they have been assigned.

**NOTE:** The Status of the **Taken** leaves can not be edited.

If the range of dates leave status is being edited, user can apply changes for the entire leave or make changes partially.

If user wants to cancel status of the entire leave, the new Status must be selected from the check box in the Leave list. If the partial changes need to be applied, user can open the leave details by clicking on the link of the leave, he wants to modify, and change the statuses for any leave days as he/she requires. The screen of the detailed leave list with the option to change statuses is show in the figure 7.14

[← Back](#)

Date	Leave Type	Status	Full Day/Half Day	Comments
Wednesday, Jul 25, 2007	Casual	Cancelled	Full Day	do not need leave
Thursday, Jul 26, 2007	Casual	Approved	Full Day	
Friday, Jul 27, 2007	Casual	Approved	Full Day	
Saturday, Jul 28, 2007	Casual	Holiday	----	
Sunday, Jul 29, 2007	Casual	Holiday	----	
Monday, Jul 30, 2007	Casual	Cancelled	Full Day	do not need leave

[Save](#)

Figure 7.14

After changing the leave statuses click **Save** button.

---

**NOTE:** If the email notifications functionality has been configured (see section 4.3 for more information), the email notification will be sent to the Supervisor of the Employee and to the HR Admin users, who have subscribed for the Leave management mail notifications, once the employee modifies and saves the status of leave.

## 7.5 Assign Leave

The HR administrator can assign leave to any employee of the company, whose information was entered into the system.

**NOTE:** Enter the Employee information (including Report-to), leave type information and information on specific holidays and weekeds must be entered into the system for the correct leave calculation.

To assign leave, click on the Assign Leave item on the left side menu. The screen displayed in the Figure 7.15 will be displayed.

The screenshot shows a web form titled "Assign Leave". It has the following fields and controls:

- Employee Name:** A text input field with a dropdown arrow on the right.
- Leave Type:** A dropdown menu currently showing "Casual".
- From Date:** A date input field with a dropdown arrow on the right.
- To Date:** A date input field with a dropdown arrow on the right.
- Full Day/Half Day:** A dropdown menu currently showing "Full Day".
- Comment:** A text area with up and down arrows on the right side.
- Apply:** A button with a green checkmark icon and the text "Apply".

Figure 7.15

While assigning leave user must select the Employee Name.

- Administrator of OrangeHRM, the list of all the employees, who were entered into the system prior, will be displayed.
  - ESS User - supervisor can assign leaves only for his/her subordinates. In this case the drop down list populated with the names of all subordinates will be displayed.
-

---

Leave type drop down list will be populated with the leave types, entered by the Administrator.

The leave range should be specified by selecting From and To dates.

The user also has the possibility to take full day or half day (morning/afternoon) leave by selecting the appropriate value from the drop down list.

Once the necessary information is being entered, click **Apply** button. The necessary leave calculations will be performed by system automatically.

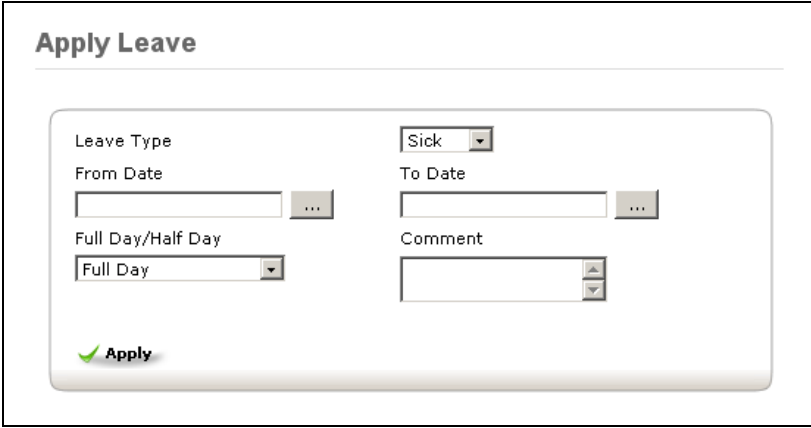
**NOTE:** If the email notifications functionality has been configured (see section 4.3 for more information), the email notification will be sent to the Employee (has has been assigned leave) and to the HR Admin users, who have subscribed for the Leave management mail notifications, once the leave is assigned.

The **Assigned** leave will change the status to **Taken** on the day of the Leave and the information for the taken and available leave for particular employee will be modified accordingly.

## 7.6 Apply for Leave

If the user is logged in to the system through the ESS, he can apply for leave through by clicking on the **Apply for Leave** menu item on the left side menu.

The screen displayed in the Figure 7.16 will be shown.



The screenshot shows a web form titled "Apply Leave". It contains the following fields and controls:

- Leave Type:** A dropdown menu with "Sick" selected.
- From Date:** A text input field with a calendar icon (three dots).
- To Date:** A text input field with a calendar icon (three dots).
- Full Day/Half Day:** A dropdown menu with "Full Day" selected.
- Comment:** A text area with a vertical scrollbar.
- Apply:** A button with a green checkmark icon and the text "Apply".

Figure 7.16

The user shall select the Leave Type from the drop down list which will be populated with the Leave Types, specified by the HR Administrator.

---

---

The From and To dates shall be chosen. If user wants to apply for the leave that is not longer than one day, the same From and To dates shall be chosen.

User can also apply for full or half day (morning or afternoon options available) leave, by selecting the appropriate value.

The comments can be specified.

After user finishes specification of leave details, he can apply for leave by clicking **Apply** button.

The leave will be pending approval from the Supervisor of the user.

**NOTE:** If the email notifications functionality has been configured (see section 4.3 for more information), the email notification will be sent to the Supervisor of the Employee, who has applied for leave and to the HR Admin users, who have subscribed for the Leave management mail notifications.

## 7.7 Approve Leave

The ESS User – Supervisor (the user has the subordinates assigned in the “Report-to” PIM section (see section 5.10 for more information)) can approve or reject leaves, that were applied for by his/her subordinates. To do so, the Supervisor must be logged in to the system through the ESS and click on **Approve Leave** left side menu item. The screen, displayed in the Figure 7.17 will be shown.

Date	Employee Name	No of Days	Leave Type	Status	Leave Period	Comments
<a href="#">2007-07-18</a> -> <a href="#">2007-07-19</a>	Ashok Kumara	2	Casual	<span>Pending Approval</span> Pending Approval Rejected Approved	Range	<input type="text"/>

Figure 7.17

To approve or reject the leave of the subordinate, Supervisor must select the appropriate Status from the drop down list. This action will approve or reject the whole leave.

The comment can be specified by Supervisor.

---

---

System has the possibility for partial approval or rejection of the leave. To do so, Supervisor shall click on the link with the leave dates. The screen displayed in the Figure 7.18 will be shown.

Date	Leave Type	Status	Full Day/Half Day	Comments
Wednesday, Jul 18, 2007	Casual	Pending Approval	Full Day	
Thursday, Jul 19, 2007	Casual	Pending Approval	Full Day	

Figure 7.18

Now the Supervisor can select **Approved** or **Rejected** Status for each day of the leave. The changes will be saved into the system after clicking **Save** button.

**NOTE:** If the email notifications functionality has been configured (see section 4.3 for more information), the email notification will be sent to the Employee, who has applied for leave, and to the HR Admin users, who have subscribed for the Leave management mail notifications.

The **Approved** leave will change the status to **Taken** on the day of the Leave and the information for the taken and available leave for particular employee will be modified accordingly.

---

---

# Chapter 8

## 8 Time Module

The module automates time tracking related processes. 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. The time module allows better tracking of the employee occupancy and the tasks that employees are working on. The effective management and task assignment strategies can be implemented based on the information, received from the employee timesheets.

### 8.1 Personal timesheets

If the user is logged into the system with the ESS (Employee Self Service) account, he/she can create the timesheets.

Click on the Time tab at the top of the web page and select **Timesheets** left side menu items. If the ESS user has subordinates assigned, he will have the opportunity to manage his own and his subordinates' timesheets. Therefore select **Personal Timesheets** in this case.

#### 8.1.1 Edit Timesheets

The user can edit the weekly timesheets. The form for the timesheet editing is displayed in the Figure 8.1.

**Timesheet for week starting 2007-07-02**

Status: Not submitted

Customer	Project / Activity	Monday 2007-07-02	Tuesday 2007-07-03	Wednesday 2007-07-04	Thursday 2007-07-05	Friday 2007-07-06	Saturday 2007-07-07	Sunday 2007-07-08	Total
No records found!									

[Edit](#) [Submit](#)

Figure 8.1

With the help of arrow buttons on top of the screen user must select the week, for which the timesheet needs to be edited. Once the week is selected, press **Edit** button and make the necessary modifications to the timesheets.

---



---

### 8.1.1.1 Add Time Events

Employee the Edit button is pressed; employee can add new time events to his timesheet. The screen shown in the Figure 8.2 will be displayed.

The screenshot shows a web interface titled "Edit timesheet for week starting 2007-07-09". It features a form with the following fields: "Customer" (a dropdown menu with "--Select--"), "Project / Activity" (a dropdown menu with "--Select--"), "Start time" (a text input field), "End time" (a text input field), "Reported date" (a text input field containing "2007-07-04"), "Duration (hours)" (a text input field), and "Description" (a text input field with a vertical scrollbar). Below the form, there are four buttons: "Update" (with a green circle icon), "Reset" (with a red circle icon), "Insert time" (with a clock icon and circled in red), and "Delete" (with a red X icon).

Figure 8.2

Employee must specify the customer or client for the task, he has been doing. The list of customers will be populated with the customer names, created by the Administrator of the system (see section 4.9 for more information).

Once the customer will be selected the project / activity drop down list will be populated with the projects that are associated with the particular customer (see section 4.10 for more information).

Employee shall insert the start time for the event. The Insert Time button will insert the current time into the field automatically and will simplify addition of the time event for the customer.

**NOTE:** The start time and date of the time event specified in the timesheet must be within the week of the timesheet. Otherwise, the time information will not be counted in.

The End time of the event AND/OR Duration shall be specified by the employee. If one of the fields is specified, the other is calculated automatically.

Reported date will be populated by the system automatically with the current date.

Employee can specify the description of the time event and click **Update**. This will update the time sheet with the information of the time event.

Press the **Reset** button to reset the information entered for the particular time event.

Once the timesheet is updated the information about the event is being entered into the weekly timesheet and the Successfully Updated notification is being displayed.

---

---

### 8.1.1.2 Edit Time Events

To edit the information about time events, user must select the appropriate Timesheet and press the **Edit** button. The screen shown in the Figure 8.3 allows editing time event information.

Customer	Project / Activity	Start time	End time	Reported date	Duration (hours)	Description
<input type="checkbox"/> New Office Technologies Pvt Ltd	BillingSys	2007-07-08 13:57	2007-07-08 16:00	2007-07-04	2.05	Preparation of the requirement
<input type="checkbox"/> --Select--	--Select--			2007-07-04		

Figure 8.3

Once the necessary modifications of the time event are performed, click **Update** button.

### 8.1.1.3 Delete Time Events

To delete the time event, click the check box for the time event and click **Delete** button. Please, refer Figure 8.3. Deletion of multiple time events can be performed simultaneously.

## 8.1.2 Submit Timesheets

Once the ESS user has entered his/her timesheet information, he can submit it for the approval of the Supervisor.

**NOTE:** The submitted and approved timesheets can not be edited

To submit the timesheet, click on the Submit button for the particular timesheet. Please, refer Figure 8.4

---

◀ Timesheet for week starting 2007-07-09 ▶

Status: Not submitted

Successfully updated

Customer	Project / Activity	Monday 2007-07-09	Tuesday 2007-07-10	Wednesday 2007-07-11	Thursday 2007-07-12	Friday 2007-07-13	Saturday 2007-07-14	Sunday 2007-07-15	Total
New Office Technologies Pvt Ltd	BillingSys	0	5.05	0	0	0	0	0	5.05
Janet Billinks	Brochures	8.55	0	0	0	0	0	0	8.55
New Office Technologies Pvt Ltd	AccountingSys	0	0	9.5	0	0	0	0	9.5
<b>Total</b>		<b>8.55</b>	<b>5.05</b>	<b>9.5</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>23.1</b>

✎ Edit    ✓ Submit

Figure 8.4

## 8.2 Employee Timesheets

The HR Administrators and the ESS Users – Supervisors, who have the subordinates assigned, can view the timesheets of the other employees. Click the **Employee Timesheets** sub menu of the **Timesheets** left side menu item.

### 8.2.1 Administrator access to Employee Timesheets

If the HR administrator views the Employee timesheets, the screen, shown in the Figure 8.5 will be displayed.

**Select Employee**

---

Employee Name  ... [View](#)

Figure 8.5

Administrator can view the submitted timesheet information for any employee information. The employee selection can be performed by clicking Browse (...) button. The employees who have been entered into the system information will be shown as in Figure 8.6. It is possible to search for Employee within the Employee list by Employee ID or Employee Name.

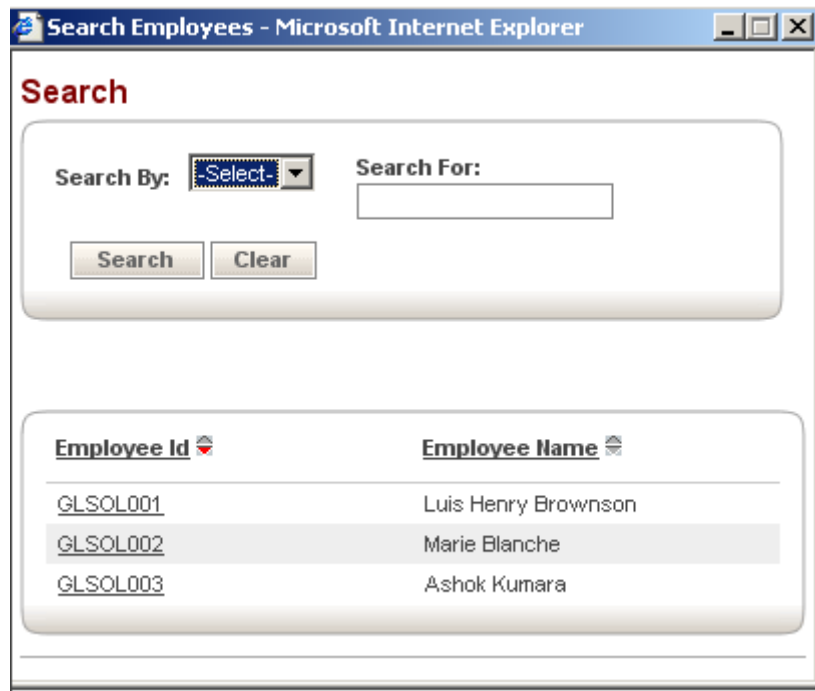



Figure 8.6

Administrator shall select the Employee from the list by clicking on the Employee ID link and press the **View** button (refer the Figure 8.5)

The information on the submitted weekly timesheets for the employee will be displayed as shown in Figure 8.7. To browse through the timesheets, use the arrow buttons on top of the screen

**Timesheet of Luis Brownson for week starting 2007-06-25** 

Status: Approved

Customer	Project / Activity	Monday 2007-06-25	Tuesday 2007-06-26	Wednesday 2007-06-27	Thursday 2007-06-28	Friday 2007-06-29	Saturday 2007-06-30	Sunday 2007-07-01	Total
New Office Technologies Pvt Ltd	AccountingSys	0	0	0	2	2	0	0	4
New Office Technologies Pvt Ltd	BillingSys	0	0	0	0	0	3	0	3
<b>Total</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>2</b>	<b>3</b>	<b>0</b>	<b>7</b>

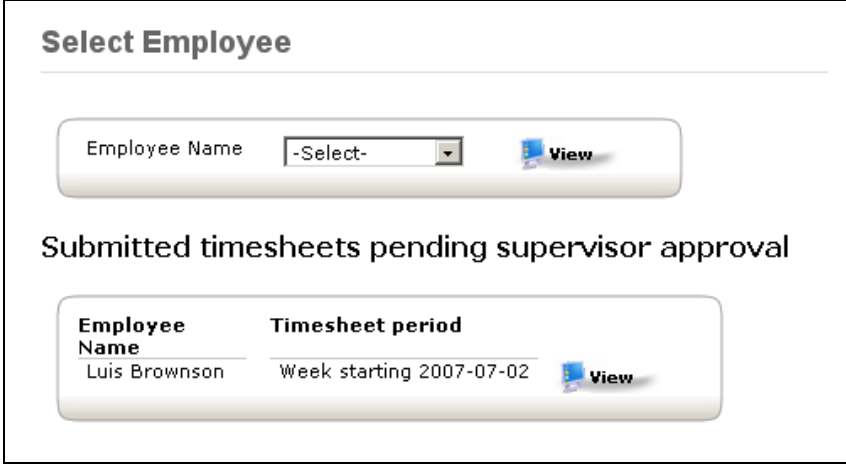
Figure 8.7

The HR administrator can approve or reject timesheets of the employee. Please refer to 8.2.3 section for further information.

---

## 8.2.2 Supervisor access to Employee Timesheets

If the Supervisor can access the timesheets submitted by his/her subordinates. If the Supervisor select Employee Timesheets from the left side menu, the screen, shown in the Figure 8.8 will be displayed.



The screenshot shows a web interface titled "Select Employee". It features a form with an "Employee Name" dropdown menu currently set to "-Select-" and a "View" button. Below this, there is a section titled "Submitted timesheets pending supervisor approval" containing a table with two columns: "Employee Name" and "Timesheet period". The table lists one entry: "Luis Brownson" for the "Week starting 2007-07-02", with a "View" button next to it.

Employee Name	Timesheet period
Luis Brownson	Week starting 2007-07-02

Figure 8.8

Supervisor can select the employee and from the **Employee Name** list, which will be populated with the employee names that have been entered into the system and have been assigned the current user as their Supervisor.

Click the **View** button and the submitted / approved / rejected timesheets of the particular employee will be displayed. Please, refer Figure 8.7 for more information.

To increase the effectiveness of browsing through the timesheets, the subordinates' timesheets that are pending approval are displayed in the separate list. Supervisor can easily select the particular timesheet from the list by clicking the **View** button for the timesheet.

The Supervisor can approve or reject timesheets of the subordinate. Please refer to 8.2.3 section for further information.

## 8.2.3 Approve/Reject and Edit Other Employee Timesheets

The HR Administrator or the Supervisor can approve/reject and edit the submitted timesheets of the other employees or their subordinates respectively.

The edition of the other employees' timesheets can be performed in the same manner as for the personal timesheets. Please, refer to the section 8.1.1 for more information.

**NOTE:** Once the timesheet is submitted, the duration field will be made read only.

---


Once the necessary changes (if any) have been made, the Supervisor or HR Admin can **Approve** or **Reject** the timesheet of the Employee. The submitted timesheets that is pending approval is shown in the Figure 8.9

**Timesheet of Luis Brownson for week starting 2007-07-02**

Status: Submitted

Successfully updated

Customer	Project / Activity	Monday 2007-07-02	Tuesday 2007-07-03	Wednesday 2007-07-04	Thursday 2007-07-05	Friday 2007-07-06	Saturday 2007-07-07	Sunday 2007-07-08	Total
New Office Technologies Pvt Ltd	BillingSys	0	0	3	0	0	0	0	3
<b>Total</b>		<b>0</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>3</b>

 Edit

Comment



 

Figure 8.9

To Approve / Reject the timesheet, press the appropriate button, as shown in the figure below.

**NOTE:** If the timesheet is **Approved**, the further edition and modification is impossible.

---

# Chapter 9

## 9 Reports Module

This feature produces customized reports according to your needs. Any number of reports can be defined by selecting from a range of search criteria and report fields. Report definitions can be saved to avoid repeating this task. Once the report definition is saved, the report can be generated by providing the required criteria data.

To access the module select **Reports** from the top menu and you will see the screen shown in the figure shown below.

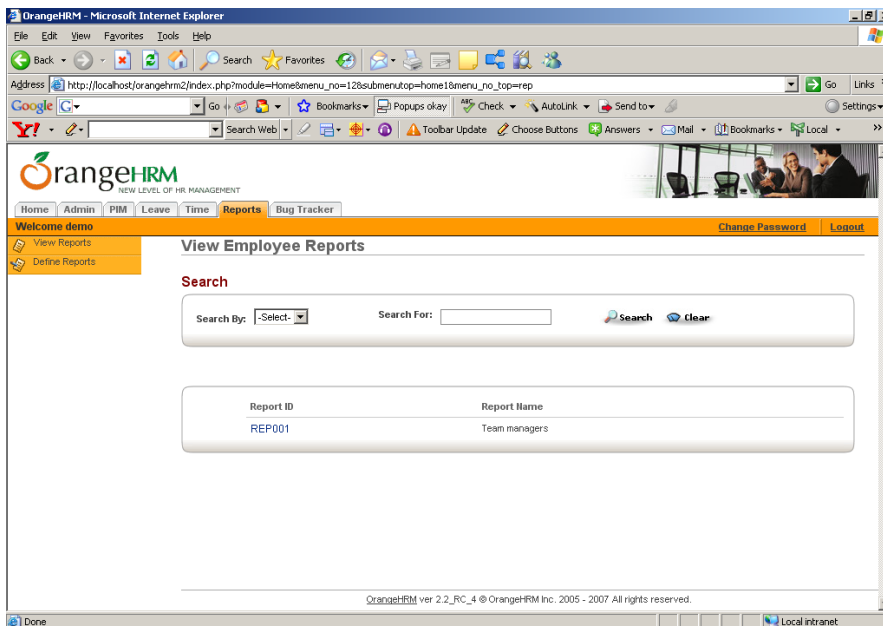


Figure 9.1

### 9.1 Define reports

To define and create reports start by clicking **Define Reports** from the left side menu. Then click on the **Add** button shown in the figure below.



Figure 9.2

---

After clicking the **Add** button you will see the screen shown in the figure below.

The screenshot shows the 'Define Employee Reports : New' interface in OrangeHRM. It features a navigation bar with 'Home', 'Admin', 'PBM', 'Leave', 'Time', 'Reports', and 'Bug Tracker'. A 'Welcome demo' banner is present. The main form has a 'Back' button and a 'Report ID' field containing 'REP002'. Below this is a 'Report Name' field. The 'Selection Criteria' section contains several checkboxes and dropdown menus: Employee (checked), Age Group, Pay Grade, Education, Employment Status, Service Period, Job Title, Language, and Skill. A 'Save' button is circled in red. Below the 'Save' button is a 'Fields to be included in' section with a list of fields, all of which have their checkboxes checked: Emp No, First Name, Last Name, Address, Tel No, Date of Birth, Report to, Reporting Method, Job Title, Joined Date, Sub Division, Qualification, Year of Passing, Employment Status, Pay Grade, Languages, Skills, Contract, and Work Experience.

Figure 9.3

- To create a report you first have to specify a Report Name.
- Then select which selection criteria the report shall be based my clicking the tick box and then selecting from the drop down menu.
- Then select which select which info fields to be included in the report.
- Finally click the **Save** button.

### 9.1.1 Assign User Groups

After clicking the **Save** button the report is created. Then the screen shown below will appear. The report is automatically assigned to the user group which the creator belongs to.



---

**Report Definition: Assign User Groups**

[← Back](#)

Report Code	REP003
Report Name	Part Time Contracts

**Assigned User Groups**

[+ Add](#) [x Delete](#)

User Groups	
<input type="checkbox"/>	Admin

Figure 9.4

If you want to assign other user groups click on the **Add** button shown in the figure above and the screen shown in the figure below will appear.

**Add User Groups**

[+ Add](#)

User Group	
<input type="checkbox"/>	Group2

Figure 9.5

Click in the tick box for the user group you want to assign and click on the **Add** button. The user group will then appear under Assigned User Groups. The users from this user group will be able to use the report you have created.

## 9.2 Edit reports

To edit reports click on **Define Reports** from the left side menu and you will see a list of the reports created as shown in the example in the figure below.

---

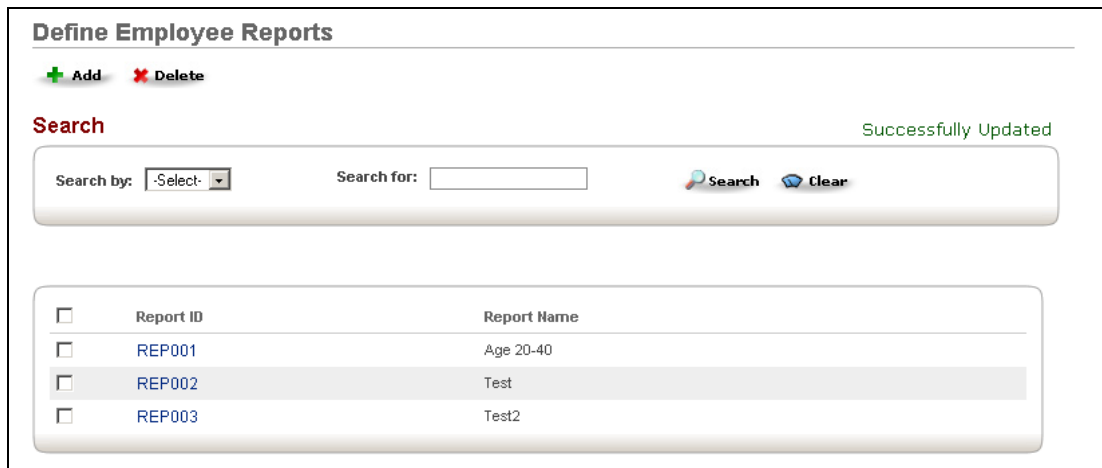


Figure 9.6

You can then access the report you need by clicking on the reports **Report ID**.

Click on the **Edit** button as shown in the figure below. Do the wanted changes and click **Save**.

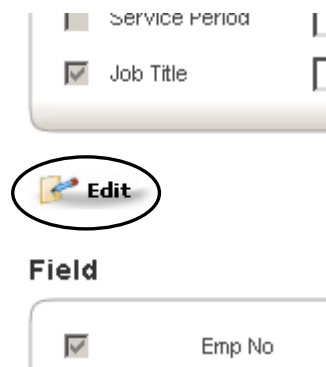


Figure 9.7

## 9.3 View reports

To view reports click on **View Reports** from the left side menu and you will see a list of the reports created as shown in the example in the figure below.

---

### View Employee Reports

**Search**

Search by:  Search for:

Report ID	Report Name
REP001	Age 20-40
REP002	Test
REP003	Test2

Figure 9.8

You can then access the report you need by clicking on the reports **Report ID**.  
The reports can be searched for by Report ID or by Report name.

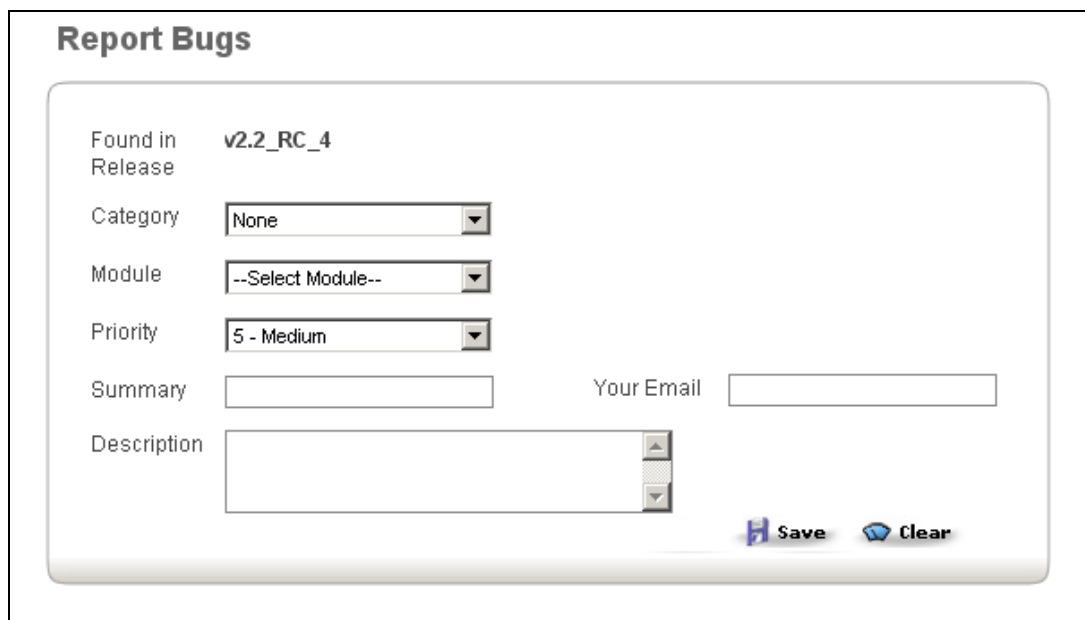
---

# Chapter 10

## 10 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 10.1 below.



**Report Bugs**

Found in Release: v2.2\_RC\_4

Category: None

Module: --Select Module--

Priority: 5 - Medium

Summary:

Your Email:

Description:

Figure 10.1

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

---

# 11 Further information

For further information on OrangeHRM please visit our website [www.orangehrm.com](http://www.orangehrm.com).

If you have any questions, comments etc. you can use the OrangeHRM forum at [www.orangehrm.com/forum](http://www.orangehrm.com/forum)

Or feel free to contact us on:

Company Information: [info@orangehrm.com](mailto:info@orangehrm.com)

Partner Information: [partners@orangehrm.com](mailto:partners@orangehrm.com)

Sales Inquiries: [sales@orangehrm.com](mailto:sales@orangehrm.com)

Technical Support: [support@orangehrm.com](mailto:support@orangehrm.com)

**Thank you for using OrangeHRM!**

---