



ESS-Supervisor User Manual for OrangeHRM OS v3.3



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1.0 Audience

This document is intended as a complete guide for ESS-Supervisors using OrangeHRM OS 3.3. This document is specially designed for non-specialists; specialists may find the document a useful point of reference. By reading this guide, you will learn how to use OrangeHRM through the elements of the graphical user interface and what's behind some of the advanced features that are not always obvious at first sight. It will hopefully guide you around some common problems that frequently appear for users of OrangeHRM.

2.0 The System

Log-in to the OrangeHRM System using the ESS-User account that has been created by the Admin as shown in Figure 1.1.



Figure 1.1: Log in Panel

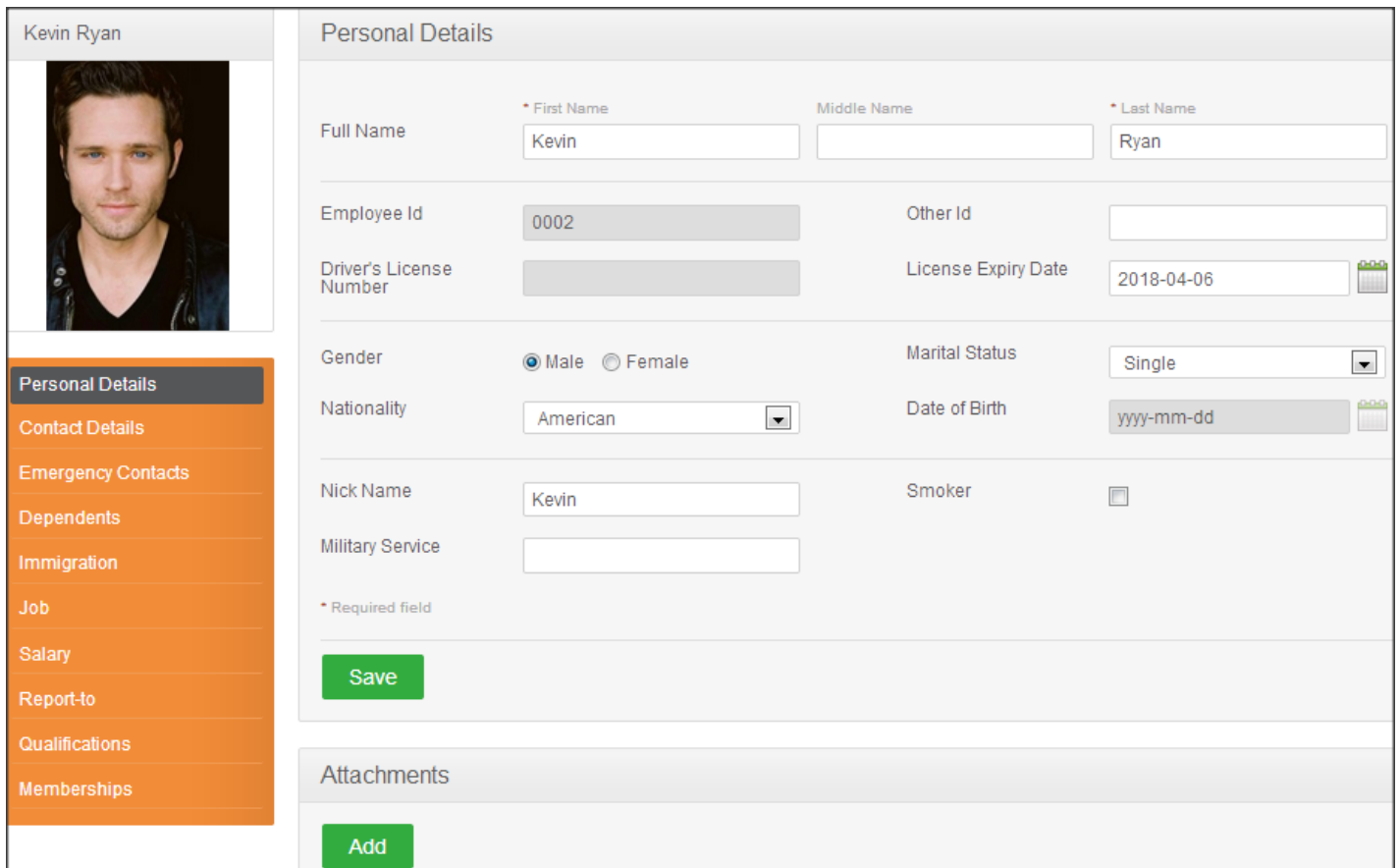
3.0 My Info Module

The My Info Module is a powerful tool providing employees of the company with the ability to view relevant information such as personal information and updating personal information with an internet enabled PC without having to involve the HR department.

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

3.1 Personal Details

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



Personal Details			
Full Name	* First Name Kevin	Middle Name	* Last Name Ryan
Employee Id	0002	Other Id	
Driver's License Number		License Expiry Date	2018-04-06
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female	Marital Status	Single
Nationality	American	Date of Birth	yyyy-mm-dd
Nick Name	Kevin	Smoker	<input type="checkbox"/>
Military Service			
* Required field			
Save			
Attachments			
Add			

Figure 1.2: Personal Details

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

Personal Details

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

3.2 Photograph

The ESS-Supervisor can add a photograph of himself/herself by clicking on the photograph/silhouette at top left corner of the screen, right above the Employee Details column. The screen as shown in Figure 1.3 will appear.

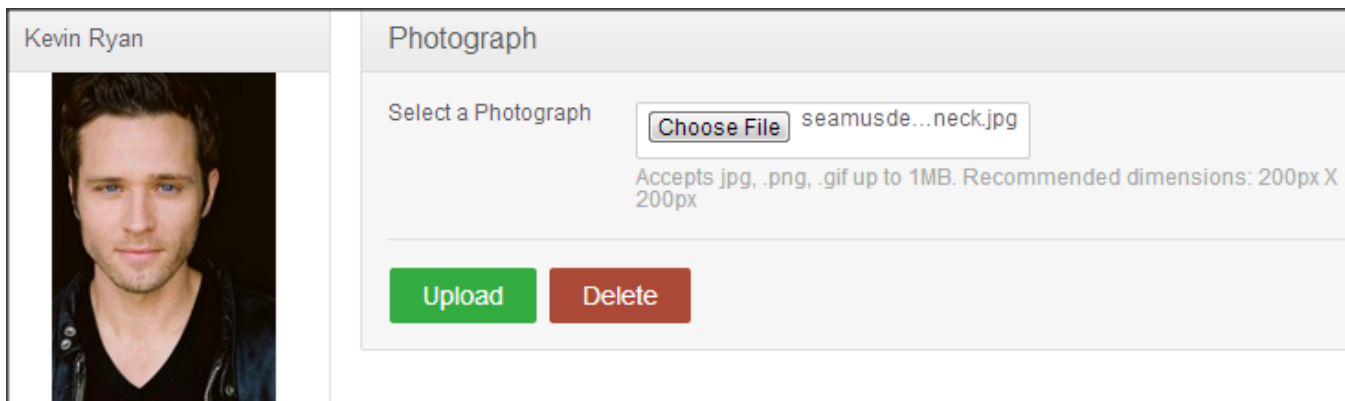


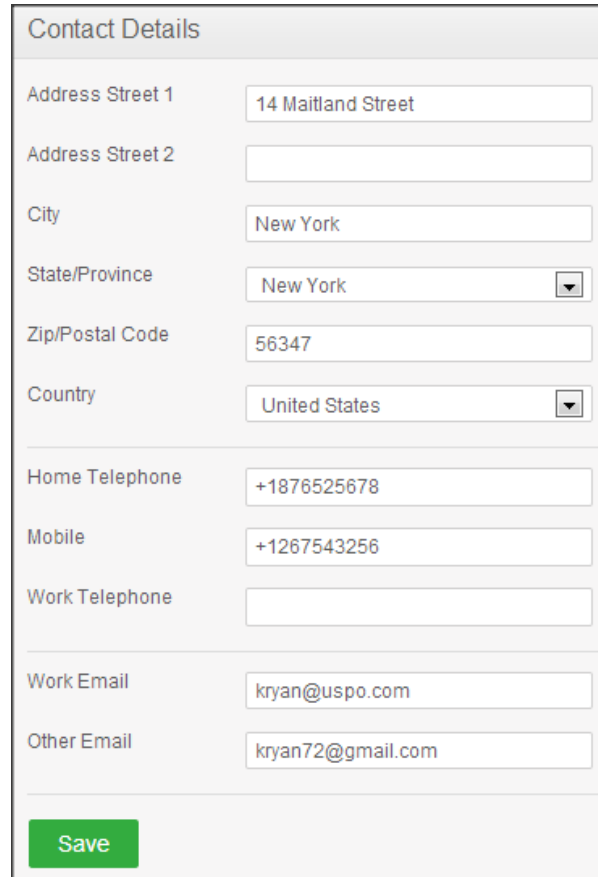
Figure 1.3: Photograph

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

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

3.3 Contact Details

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

A screenshot of a web form titled "Contact Details". The form contains several input fields and dropdown menus. The fields are: Address Street 1 (14 Maitland Street), Address Street 2 (empty), City (New York), State/Province (New York), Zip/Postal Code (56347), Country (United States), Home Telephone (+1876525678), Mobile (+1267543256), Work Telephone (empty), Work Email (kryan@uspo.com), and Other Email (kryan72@gmail.com). A green "Save" button is located at the bottom left of the form.

Contact Details	
Address Street 1	14 Maitland Street
Address Street 2	
City	New York
State/Province	New York
Zip/Postal Code	56347
Country	United States
<hr/>	
Home Telephone	+1876525678
Mobile	+1267543256
Work Telephone	
<hr/>	
Work Email	kryan@uspo.com
Other Email	kryan72@gmail.com
<hr/>	
<input type="button" value="Save"/>	

Figure 1.4: Contact Details

Click "Edit" to enter the contact information.

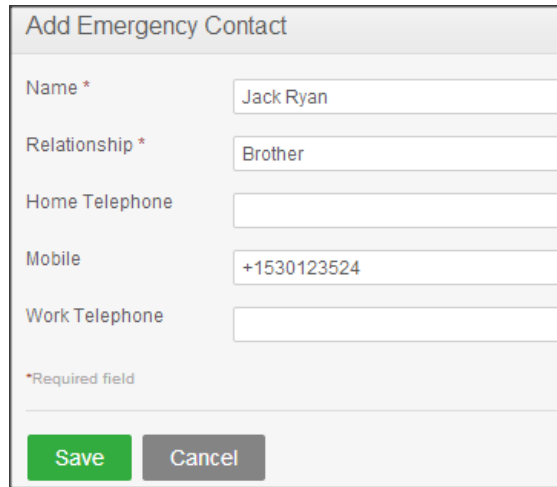
You can edit the following:

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

Once you have completed this form click "Save".

3.4 Emergency Contacts

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



Add Emergency Contact

Name *

Relationship *

Home Telephone

Mobile

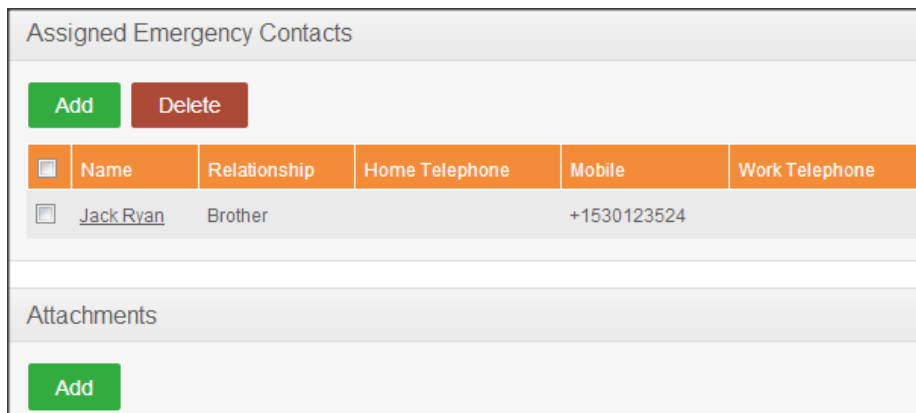
Work Telephone

*Required field

Figure 1.5: Add Emergency Contact

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

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



Assigned Emergency Contacts

<input type="checkbox"/>	Name	Relationship	Home Telephone	Mobile	Work Telephone
<input type="checkbox"/>	Jack Ryan	Brother		+1530123524	

Attachments

Figure 1.6: Assigned Emergency Contacts

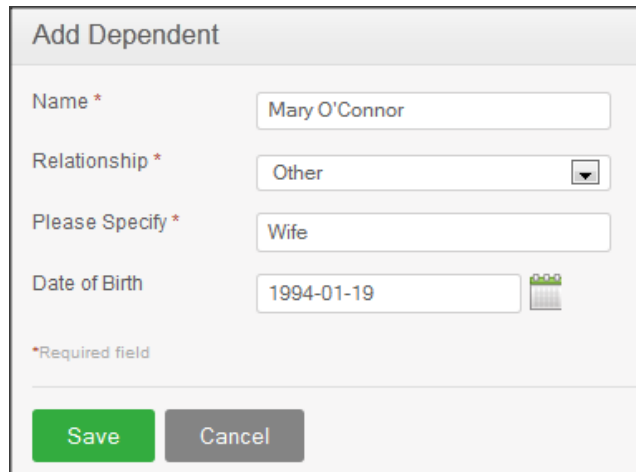
You may add multiple entries of emergency contacts.

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

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

3.5 Dependents

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



The form titled "Add Dependent" contains the following fields:

- Name *: Mary O'Connor
- Relationship *: Other (dropdown menu)
- Please Specify *: Wife
- Date of Birth: 1994-01-19 (calendar icon)

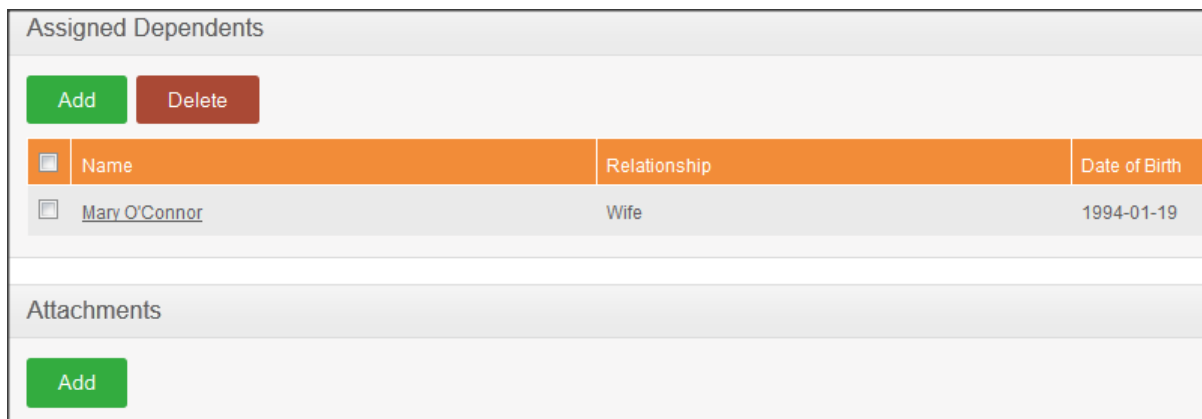
*Required field

Buttons: Save, Cancel

Figure 1.7: Add Dependents

Enter the “Name” of your dependent, the “Relationship” of the dependant to you and his/her “Date of Birth”.

Click “Save” once you have entered the following fields and your dependent will be listed as shown in Figure 1.8.



Assigned Dependents

Buttons: Add, Delete

<input type="checkbox"/>	Name	Relationship	Date of Birth
<input type="checkbox"/>	Mary O'Connor	Wife	1994-01-19

Attachments

Buttons: Add

Figure 1.8: Assigned Dependents

You may add multiple entries of dependents.

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

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

3.6 Immigration

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

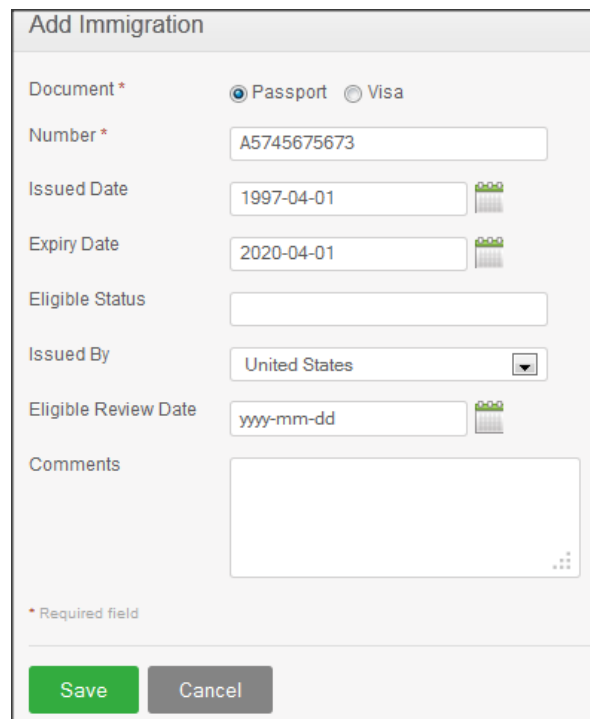



Figure 1.9: Add Immigration

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

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



<input type="checkbox"/>	Document	Number	Issued By	Issued Date	Expiry Date
<input type="checkbox"/>	Passport	A5745675673	United States	1997-04-01	2020-04-01

Figure 2.0: Assigned Immigration Documents

You may add multiple entries of immigration documents.

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

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

3.7 Job

You are only able to view your job details that have been pre-defined by the Admin as shown in Figure 2.1. You are restricted from editing the following fields:

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

Job	
Job Title	Finance Manager
Job Specification	Not Defined
Employment Status	Full-Time Permanent
Job Category	-- Select --
Joined Date	2013-03-13
Sub Unit	Finance Division
Location	HQ
Employment Contract	
Start Date	2006-04-05
End Date	yyyy-mm-dd
Contract Details	Not Defined
Attachments	

Figure 2.1: Job Details

3.8 Salary

The salary information field is completely hidden from the ESS-Supervisor as shown in Figure 2.2. Only the HR Admin has access to this information and has to be manually communicated to the ESS-Supervisor. The ESS-Supervisor will only be able to view his salary details.

You are restricted from editing the following fields in this section.

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

Assigned Salary Components					
Salary Component	Pay Frequency	Currency	Amount	Comments	Show Direct Deposit Details
Basic		United States Dollar	30000		

Figure 2.2: Salary Details

3.9 Report To

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

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

You are restricted from editing the following fields:

- Assigned Supervisors
- Assigned Subordinates
- Attachments

There are two default types of reporting method:

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

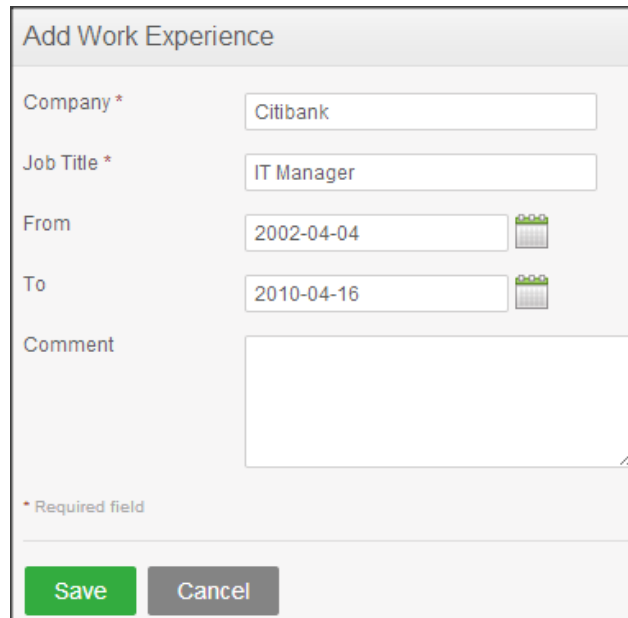
Assigned Supervisors	
Name	Reporting Method
No Records Found	
Assigned Subordinates	
Name	Reporting Method
Jennifer Brown	Direct
Kevin Mathews	Direct

Figure 2.3: Assigned Supervisors/Subordinate Details

3.10 Qualifications

Work Experience

Your previous work experiences can be entered here. To enter previous work experiences, click “Add” under “Work Experience” and the screen as shown in Figure 2.4 will appear.



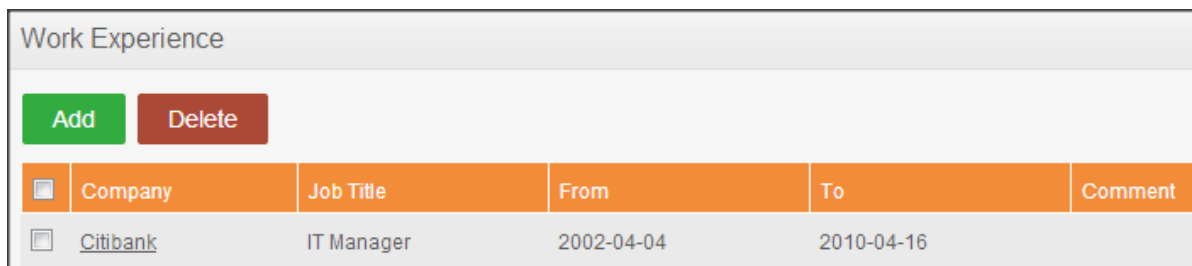
The form titled "Add Work Experience" contains the following fields:

- Company *: Citibank
- Job Title *: IT Manager
- From: 2002-04-04
- To: 2010-04-16
- Comment: (empty text area)

At the bottom, there are "Save" and "Cancel" buttons. A legend indicates that fields with an asterisk are required.

Figure 2.4: Add Work Experience

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



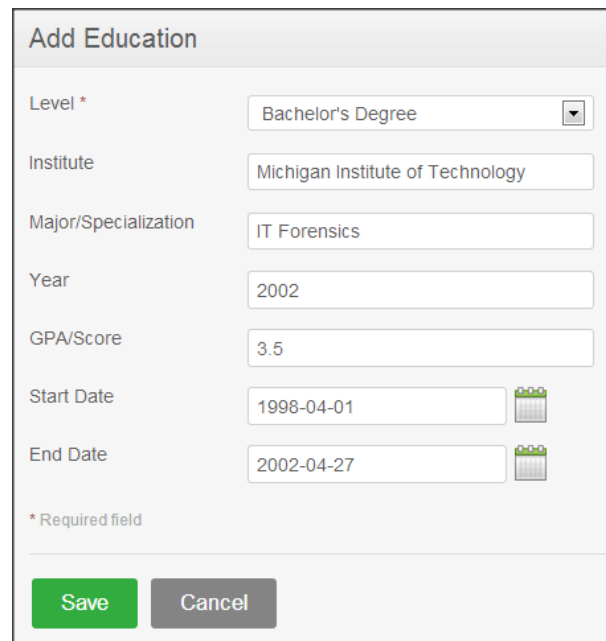
Work Experience					
Add		Delete			
<input type="checkbox"/>	Company	Job Title	From	To	Comment
<input type="checkbox"/>	Citibank	IT Manager	2002-04-04	2010-04-16	

Figure 2.5: Work Experience List

You may enter multiple entries of past work experiences.

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

You are able to enter details of your education here. To enter education details, click “Add” under “Education” and the screen as shown in Figure 2.6 will appear.



The 'Add Education' form contains the following fields:

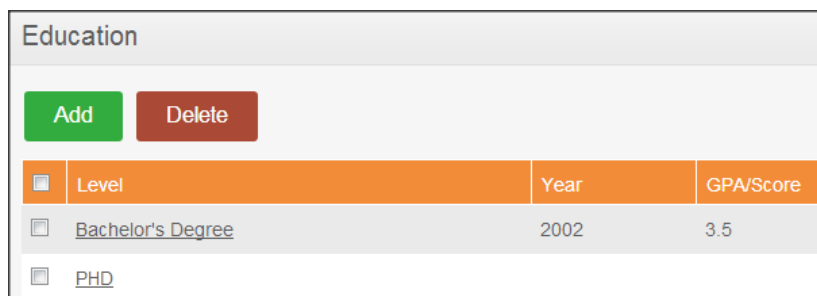
- Level *: Bachelor's Degree (dropdown menu)
- Institute: Michigan Institute of Technology
- Major/Specialization: IT Forensics
- Year: 2002
- GPA/Score: 3.5
- Start Date: 1998-04-01 (calendar icon)
- End Date: 2002-04-27 (calendar icon)

* Required field

Buttons: Save, Cancel

Figure 2.6: Add Education

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



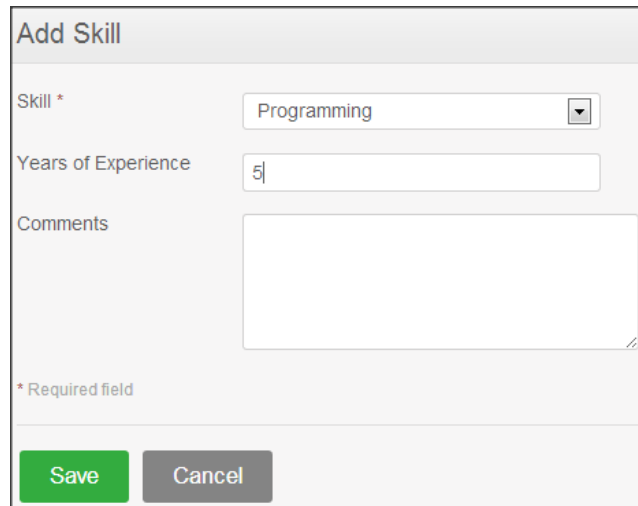
Education			
<input type="button" value="Add"/>		<input type="button" value="Delete"/>	
<input type="checkbox"/>	Level	Year	GPA/Score
<input type="checkbox"/>	Bachelor's Degree	2002	3.5
<input type="checkbox"/>	PHD		

Figure 2.7: Education history

You may enter multiple entries of education.

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

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



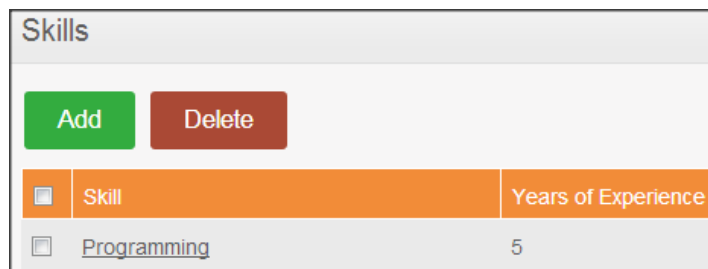
The 'Add Skill' form contains the following fields:

- Skill ***: A dropdown menu with 'Programming' selected.
- Years of Experience**: A text input field containing the number '5'.
- Comments**: A large empty text area.

At the bottom of the form, there are two buttons: a green 'Save' button and a grey 'Cancel' button. A small asterisk icon is located below the 'Comments' field, indicating a required field.

Figure 2.8: Add Skill

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



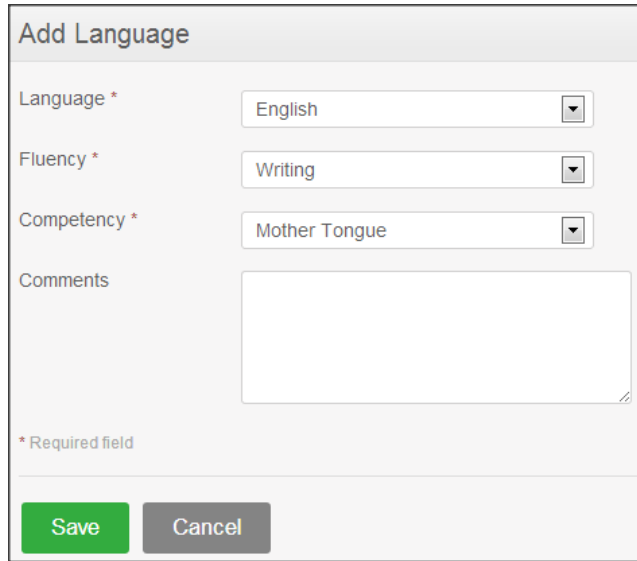
Skills		
<input type="button" value="Add"/> <input type="button" value="Delete"/>		
<input type="checkbox"/>	Skill	Years of Experience
<input type="checkbox"/>	Programming	5

Figure 2.9: List of Skills

You may enter multiple entries of skills.

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

You can enter the various languages that you are competent in, with the level of competency. To enter your language of competency, click “Add” under “Languages” and the screen as shown in Figure 3.0 will appear.



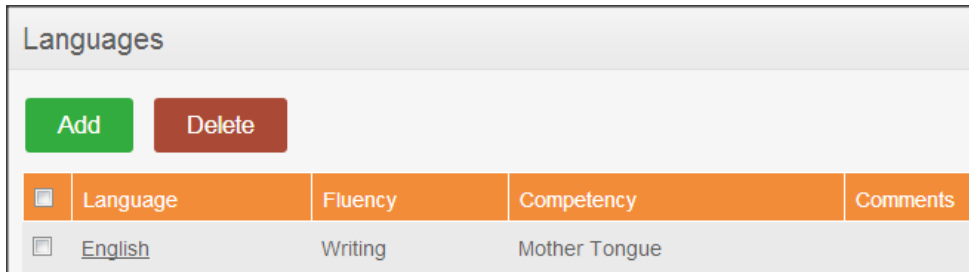
The form titled "Add Language" contains the following fields:

- Language *: English (dropdown menu)
- Fluency *: Writing (dropdown menu)
- Competency *: Mother Tongue (dropdown menu)
- Comments: A large empty text area.

At the bottom, there are "Save" and "Cancel" buttons. A note at the bottom left states "* Required field".

Figure 3.0: Add Language

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



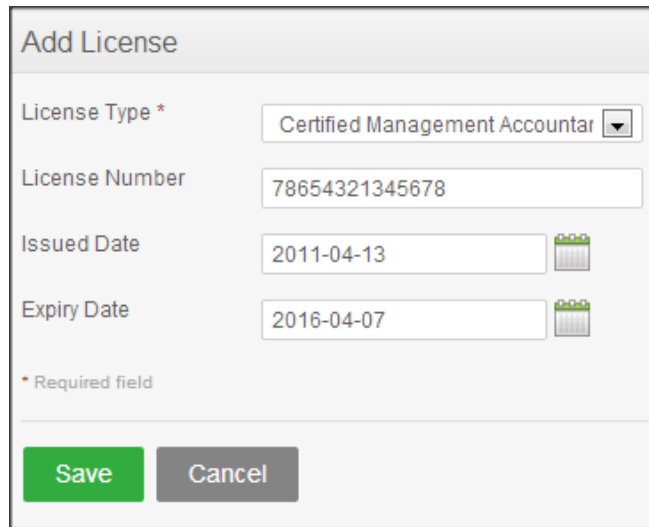
Languages				
<input type="checkbox"/>		<input type="button" value="Add"/>	<input type="button" value="Delete"/>	
<input type="checkbox"/>	Language	Fluency	Competency	Comments
<input type="checkbox"/>	English	Writing	Mother Tongue	

Figure 3.1: List of Languages of Competency

You may enter multiple entries of languages.

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

Here you can enter the licenses that you may have. To enter licenses click “Add” under “License” and the screen as shown in Figure 3.2 will appear.



The 'Add License' form contains the following fields:

- License Type ***: A dropdown menu with 'Certified Management Accountant' selected.
- License Number**: A text input field containing '78654321345678'.
- Issued Date**: A date picker field showing '2011-04-13'.
- Expiry Date**: A date picker field showing '2016-04-07'.

At the bottom, there are 'Save' and 'Cancel' buttons. A legend indicates that the asterisk (*) denotes a required field.

Figure 3.2: Add License

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



License			
<input type="button" value="Add"/>		<input type="button" value="Delete"/>	
<input type="checkbox"/>	License Type	Issued Date	Expiry Date
<input type="checkbox"/>	Certified Management Accountant (CMA)	2011-04-13	2016-04-07
<input type="checkbox"/>	Oracle Certified Professional Java SE Programmer	2013-04-10	2019-04-25

Figure 3.3: List of Licenses

You may enter multiple entries of licenses.

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

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

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

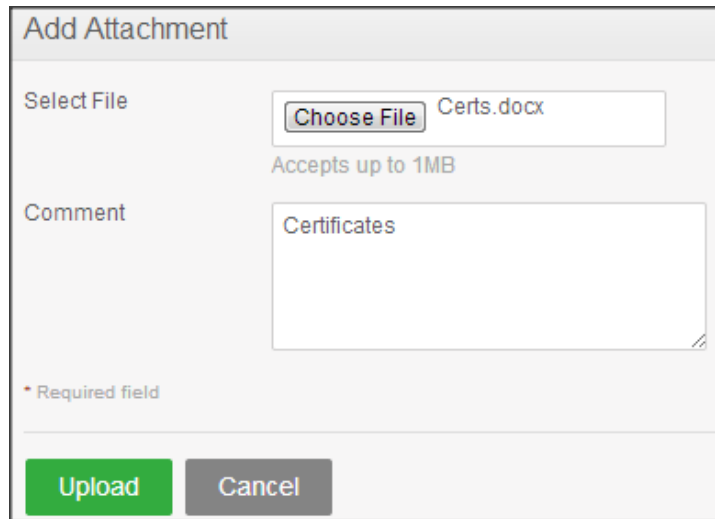
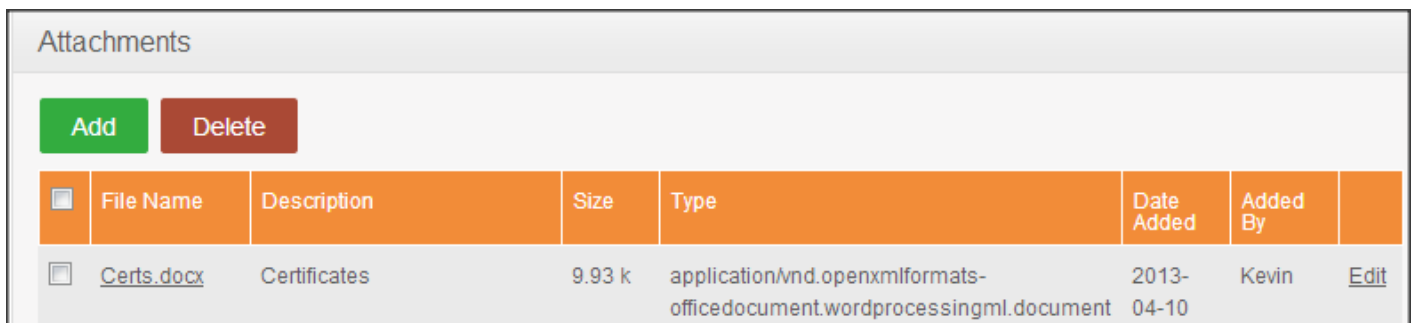


Figure 3.4: Add Attachment

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



	File Name	Description	Size	Type	Date Added	Added By	
<input type="checkbox"/>	Certs.docx	Certificates	9.93 k	application/vnd.openxmlformats-officedocument.wordprocessingml.document	2013-04-10	Kevin	Edit

Figure 3.5: List of Attachments

You may upload multiple attachments.

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

3.11 Membership

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

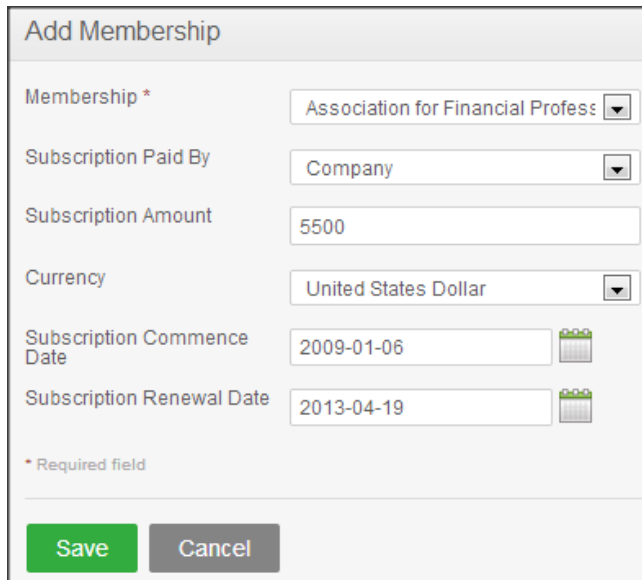
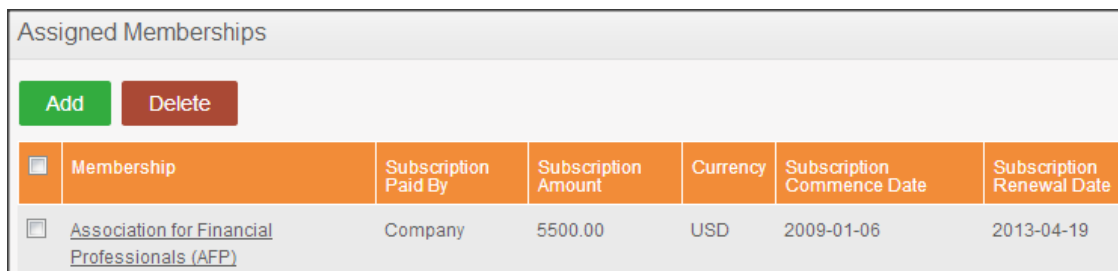


Figure 3.6: Add Membership Details

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



Assigned Memberships						
<input type="button" value="Add"/> <input type="button" value="Delete"/>						
<input type="checkbox"/>	Membership	Subscription Paid By	Subscription Amount	Currency	Subscription Commence Date	Subscription Renewal Date
<input type="checkbox"/>	Association for Financial Professionals (AFP)	Company	5500.00	USD	2009-01-06	2013-04-19

Figure 3.7: Assigned Memberships

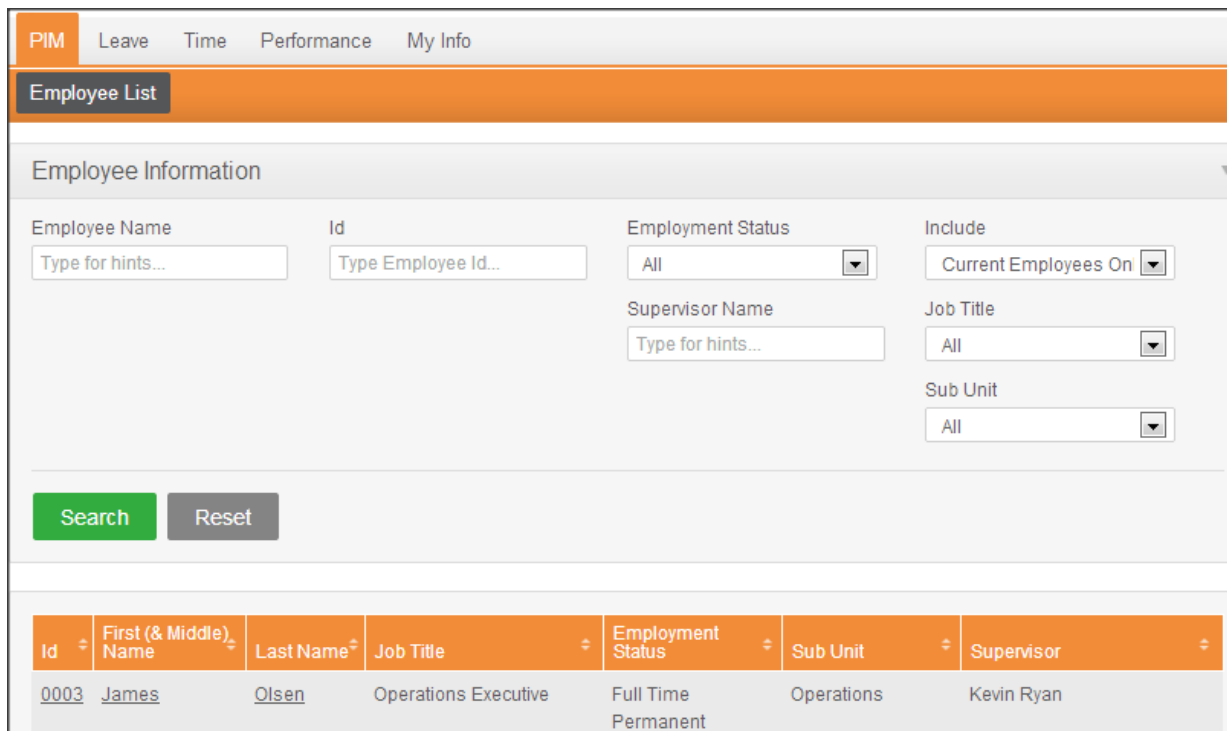
You may enter multiple entries of memberships. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

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

4.0 PIM Module

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

To view employee list, go to **PIM>>Employee List** and the screen as shown in Figure 3.8 will appear.



Id	First (& Middle) Name	Last Name	Job Title	Employment Status	Sub Unit	Supervisor
0003	James	Olsen	Operations Executive	Full Time Permanent	Operations	Kevin Ryan

Figure 3.8: Employee Information

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

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

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

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

- Salary
- Report-to

5.0 Leave Module

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

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

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

- Entitlements
- Reports
- Leave List
- Assign Leave
- My Leave
- Apply

5.1 Entitlements

This feature allows you to view your leave entitlement for all leave types (**Leave>> Entitlements >> My Entitlements**), as well as being able to view your subordinate's leave entitlement details (**Leave>>Entitlements>>Employee Entitlements**), as shown in Figure 3.9.

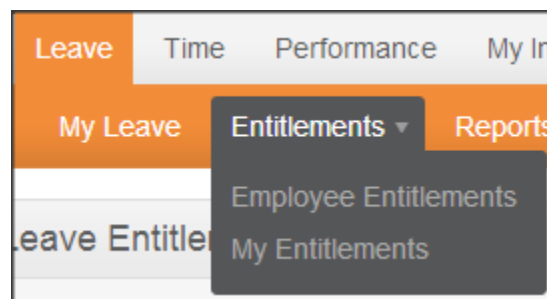


Figure 3.9: ESS-Supervisor Entitlements menu

To view his/her own leave entitlement, the ESS Supervisor has to click on **Leave>> Entitlements >> My Entitlements**. He/she can then search by "Leave Type" or "Leave Period". Clicking "Search" will show all available leave entitlements as shown in Figure 4.0.

My Leave Entitlements

Leave Type: Leave Period:

Leave Type	Entitlement Type	Valid From	Valid To	Days
Annual Leave	Added	2013-01-01	2013-12-31	20.00
Total				20.00

Figure 4.0: ESS-Supervisor- My Entitlements

To view a subordinate's leave entitlement, the Supervisor has to click on **Leave >> Entitlements >> Employee Entitlements** and then type in the name of the subordinate under "Employee", and select the "Leave Type" and "Leave Period", as shown in Figure 4.1.

Leave Entitlements

Employee: Leave Type: Leave Period:

Figure 4.1: ESS-Supervisor - Subordinate Entitlement Search

Clicking "Search" will then show the leave that has been entitled to that subordinate, as shown in Figure 4.2.

Leave Entitlements

Employee: Leave Type: Leave Period:

Leave Type	Entitlement Type	Valid From	Valid To	Days
Annual Leave	Added	2013-01-01	2013-12-31	20.00
Total				20.00

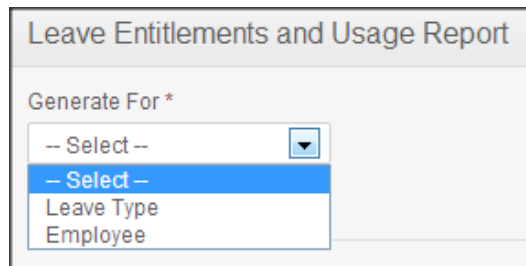
Figure 4.2: ESS-Supervisor View of Subordinate Entitlement

5.2 Reports

This feature allows ESS-Supervisors to generate Leave Entitlements and Usage Reports of their subordinates (**Leave>>Entitlements>> Leave Entitlements and Usage Report**) as well as for themselves (**Leave>>Entitlements>> My Leave Entitlements and Usage Report**).

Leave Entitlements and Usage Report

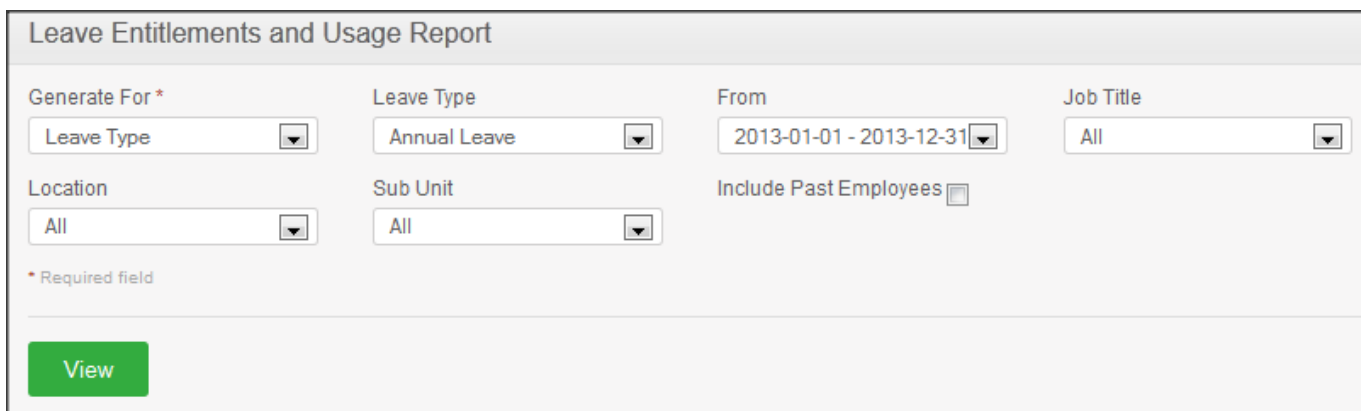
By going to **Leave>>Entitlements>> Leave Entitlements and Usage Report**, the ESS-Supervisor will be presented with the following screen (Figure 4.2.1). Here the ESS-Supervisor can select between two main criteria when generating reports for their subordinates: “Leave Type” and “Employee”.



The screenshot shows a web form titled "Leave Entitlements and Usage Report". Below the title is a label "Generate For *" followed by a dropdown menu. The dropdown menu is open, showing three options: "-- Select --" (highlighted in blue), "Leave Type", and "Employee".

Figure 4.2.1: Leave List

If the HR Admin selects “Leave Type”, he will then be presented with the following fields to select from (Figure 4.2.2).



The screenshot shows a web form titled "Leave Entitlements and Usage Report". It contains several fields for report generation:

- Generate For ***: Dropdown menu with "Leave Type" selected.
- Leave Type**: Dropdown menu with "Annual Leave" selected.
- From**: Date range dropdown menu with "2013-01-01 - 2013-12-31" selected.
- Job Title**: Dropdown menu with "All" selected.
- Location**: Dropdown menu with "All" selected.
- Sub Unit**: Dropdown menu with "All" selected.
- Include Past Employees**: A checkbox that is currently unchecked.

At the bottom left of the form is a green button labeled "View". A small asterisk icon and the text "* Required field" are located below the "Generate For" field.

Figure 4.2.2: Leave Type Report Generation view

Once the appropriate fields are selected, the ESS Supervisor can then click “View” and will be presented with the leave report of all subordinates based on the selected criteria (Figure 4.2.3).

Employee	Leave Entitlements (Days)	Leave Pending Approval (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days)
James Olsen	<u>20.00</u>	<u>9.38</u>	<u>0.00</u>	<u>0.00</u>	10.63

Figure 4.2.3: Subordinate Leave Report

If the “Employee” option is selected under “Generate For” (Figure 4.2.1) the ESS-Supervisor can generate the leave entitlement and usage report for specific subordinates. The name of the subordinate will need to be inserted into the “Employee” field, and a report will be generated for that subordinate (as shown in Figure 4.2.4).

Leave Type	Leave Entitlements (Days)	Leave Pending Approval (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days)
Annual Leave	<u>20.00</u>	<u>9.38</u>	<u>0.00</u>	<u>0.00</u>	10.63
Sick Leave	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	0.00

Figure 4.2.4: Leave Entitlements and Usage Report of a single employee (subordinate)

My Leave Entitlements and Usage Report

To view personal Leave Entitlements and Usage Report, the ESS-Supervisor can navigate to **Leave >> Entitlements >> My Leave Entitlements and Usage Report**.

The ESS-Supervisor can select the Leave Period that he wishes to generate a report based on, and then click on “View”. The following screen will appear as shown in Figure 4.2.5.

My Leave Entitlements and Usage Report

From

2013-01-01 - 2013-12-31 ▼

2013-01-01 - 2013-12-31

2014-01-01 - 2014-12-31

View

Leave Type	Leave Entitlements (Days)	Leave Pending Approval (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days)
Annual Leave	<u>20.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	20.00
Sick Leave	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	0.00

Figure 4.2.5: My Leave Entitlements and Usage Report

5.3 Leave List

This feature shows the entire leave request of your subordinates. When your subordinate applies for leave you will receive an email notification. As an ESS-Supervisor you can approve, reject or cancel the leave request by accessing the “Leave List” page. To view Leave List, go to **Leave >> Leave List** and the screen as shown in Figure 4.3 will appear.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
2013-04-03 to 2013-04-05	Kevin Ryan	Annual Leave	17.00	3.00	Pending Approval(3.00)		Select Action <input type="button" value="v"/> Select Action Approve Cancel Reject

Figure 4.3: Leave List

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

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

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

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

Leave Request Details

To view detailed information of your subordinate’s leave request click on the “Date or “Status” to perform an action individually as shown in Figure 4.4. Select the necessary action to the leave request and click “Save”.

Leave Request (2013-04-17 to 2013-04-19) Kevin Ryan

[View Leave Request Comments](#)

Date	Leave Type	Leave Balance (Days)	Duration (Hours)	Status	Comments	Actions
2013-04-17	Annual Leave	14.00	9.00	Pending Approval		Select Action
2013-04-18	Annual Leave	14.00	9.00	Pending Approval		Select Action
2013-04-19	Annual Leave	14.00	9.00	Pending Approval		Select Action

Save Back

Select Action
 Approve
 Cancel
 Reject

Figure 4.4: Subordinate's Leave Request Details

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


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


Search Leave List

You can view leave using the search toolbar as shown in Figure 4.5 by:

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


Leave List

From  Hide Options

To 

Show Leave with Status
 All Rejected Cancelled Pending Approval Scheduled Taken

Employee

Sub Unit 

Include Past Employees

Search
Reset


Figure 4.5: Leave List Search

5.4 Assign Leave


This feature allows the ESS-Supervisor to assign leave for all his subordinates. To assign leave, go to **Leave>> Assign Leave** and the screen as shown in Figure 4.6 will appear.


Assign Leave



Employee Name *

Leave Type * 

Leave Balance 10.00 [view details](#)

From Date * 

To Date * 

Duration  

Comment

* Required field

Assign

Figure 4.6: Assign Leave


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


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

5.5 My Leave

Your personal leave request details can be viewed here. To view your leave requests details, go to **Leave>> My Leave** and the screen as shown in Figure 4.7 will appear.

My Leave List

From: 

To: 

Show Leave with Status: All Rejected Cancelled Pending Approval Scheduled Taken

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
2013-04-26	Kevin Ryan	Annual Leave	13.67	0.33	Pending Approval(0.33)	Half day leave.	Select Action <input type="button" value="v"/>
2013-04-17 to 2013-04-19	Kevin Ryan	Annual Leave	13.67	3.00	Pending Approval(2.00) Scheduled(1.00)		Go to Detailed View
2013-04-03 to 2013-04-05	Kevin Ryan	Annual Leave	13.67	3.00	Taken(3.00)		

Figure 4.7: My Leave List

You can view leave using the search toolbar as shown in Figure 4.7 by:

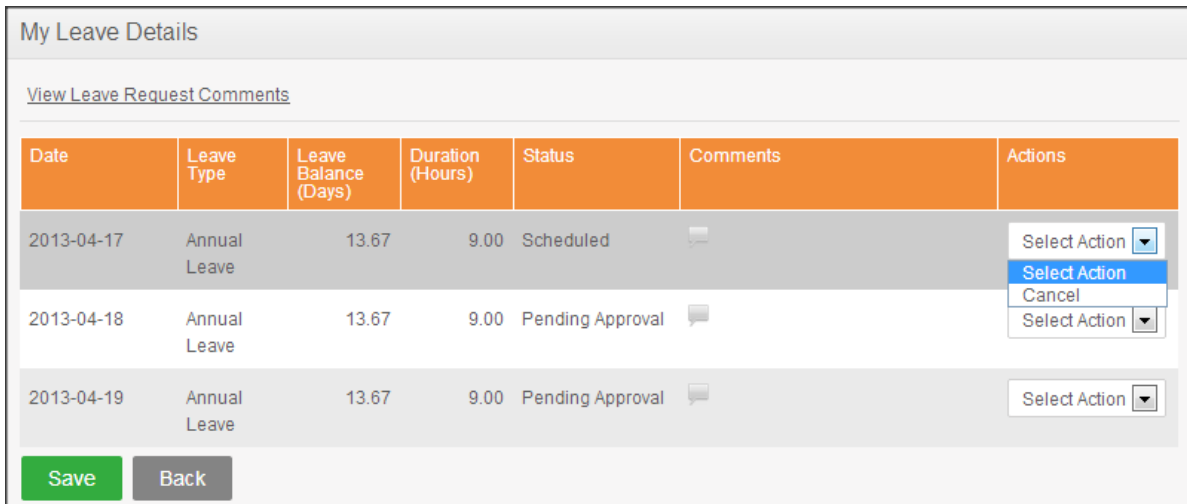
- Specifying the period using the “From” and “To” dates
- Selecting the status or combination of status of the following:
 - Rejected
 - Canceled
 - Pending Approval
 - Approved
 - Taken

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

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

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

You can view complete details of your leave by clicking on the “Date” or “Status” of your leave request and the screen as shown in Figure 4.8 will appear.



Date	Leave Type	Leave Balance (Days)	Duration (Hours)	Status	Comments	Actions
2013-04-17	Annual Leave	13.67	9.00	Scheduled		Select Action Select Action Cancel Select Action
2013-04-18	Annual Leave	13.67	9.00	Pending Approval		Select Action
2013-04-19	Annual Leave	13.67	9.00	Pending Approval		Select Action

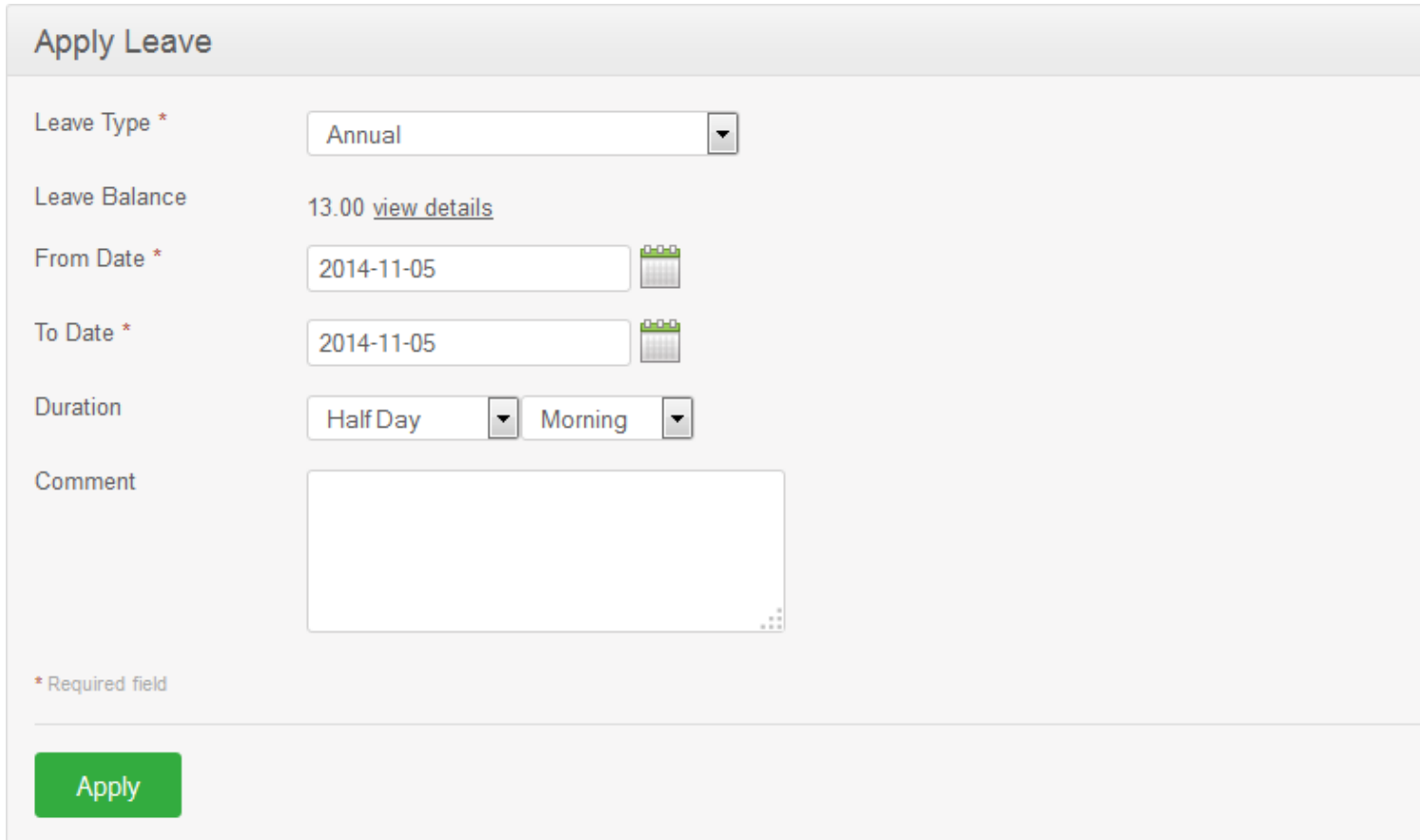
Save Back

Figure 4.8: My Leave Details

You may perform an action on individual leave request on a per-day basis by selecting options from the “Action” drop down menu. Select “Cancel” to cancel the leave request. Click “Save” to save the changes made.

5.6 Apply

All users except for the Admin unless he is an employee can apply leave from this option. To apply for a leave go to **Leave>>Apply** and the screen shown as shown in Figure 12.9 will appear.



The screenshot shows the 'Apply Leave' form with the following fields and values:

- Leave Type ***: Annual
- Leave Balance**: 13.00 [view details](#)
- From Date ***: 2014-11-05
- To Date ***: 2014-11-05
- Duration**: Half Day, Morning
- Comment**: (Empty text area)

* Required field

Apply

Figure 12.9: Apply Leave

Select the leave type from the drop down menu and the “From Date” and “To Date” you prefer the leave to be taken, either you can select range of days or same day, if it is for the same day, the duration field will be enabled, which allows you to apply for half day or partial day leave (morning or afternoon) and also you can add a comment on why you need the leave if necessary. The system also shows the remaining leave balance for the specific leave type.

Once you have filled in the details click “Apply” and a mail will be sent to the Supervisor (as well as the Admin, if configured under Notifications) for approval. The status of your leave application can be seen in “My Leave” as shown in Figure 13.0.



Once you have filled in the details click “Apply” and a mail will be sent your respective supervisor (if you have one) and/or the Admin for approval. The status of your leave application can be seen in “My Leave” as shown in Figure 5.0.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
2013-04-26	Kevin Ryan	Annual Leave	13.67	0.33	Pending Approval(0.33)	Half day leave.	Select Action <input type="button" value="v"/>
2013-04-17 to 2013-04-19	Kevin Ryan	Annual Leave	13.67	3.00	Pending Approval(2.00) Scheduled(1.00)		Go to Detailed View
2013-04-03 to 2013-04-05	Kevin Ryan	Annual Leave	13.67	3.00	Taken(3.00)		

Figure 5.0: My Leave Request

6.0 Time Module

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

The ESS- Supervisor will be able to view the following in the Time Module which will further be explained in detail:

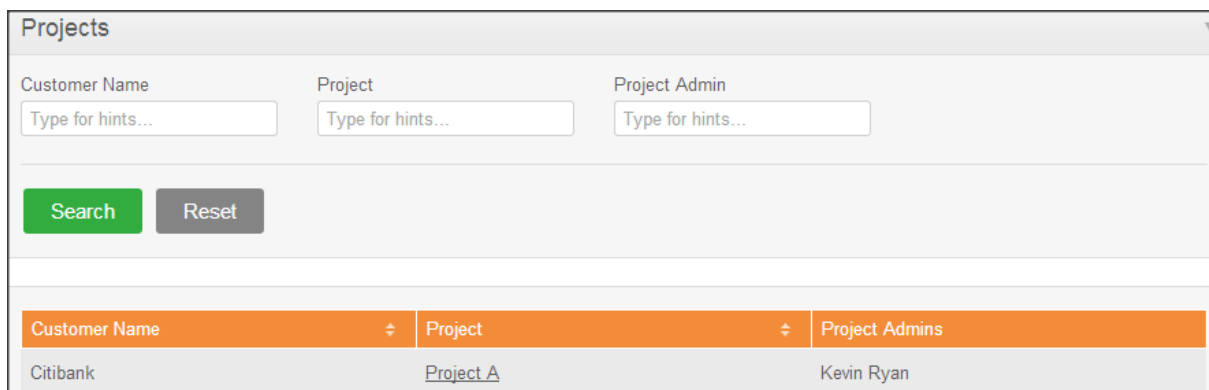
- Project Info
- Timesheet
 - My Timesheet
 - Employee Timesheet
- Attendance
 - My Records
 - Punch in/out
 - Employee Records
- Reports
 - Employee Reports
 - Attendance Summary

The ESS–Supervisor can:

- View project information, and view/edit/add project activities if he/she is the project admin.
- Enter, modify and submit personal timesheets
- View / Edit / Approve / Reject/Add timesheets of his subordinates
- Enter his/her punch in/out time
- Enter time events spent on the project activities
- View his subordinates' employee attendance records.
- View subordinate's project reports and attendance summary.

6.1 Project Info

If an ESS-Supervisor user has been assigned to a project as a Project Admin, he/she will be able to view the projects that he/she has been assigned to (**Time>>Project Info>>Projects**) and the screen as shown in Figure 5.1 will appear.

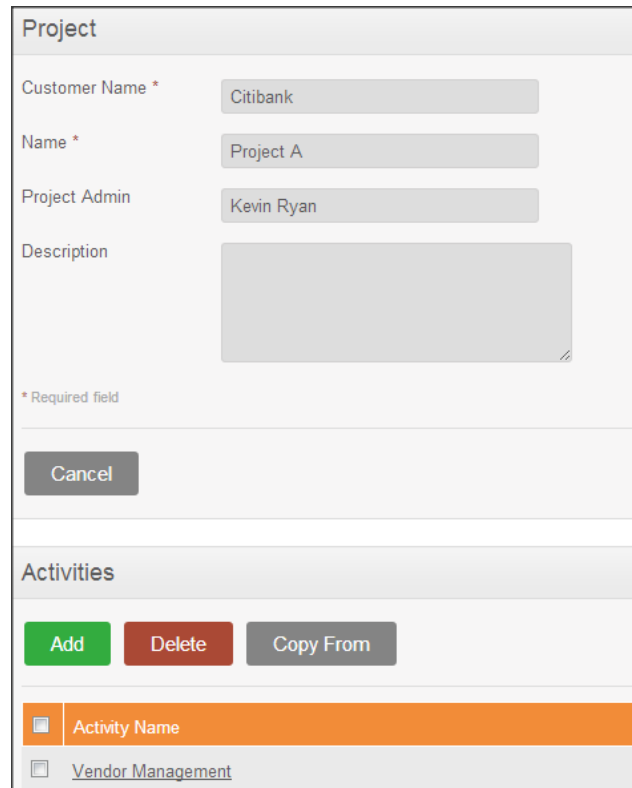


The screenshot shows a web interface titled "Projects". It features three search filters: "Customer Name", "Project", and "Project Admin", each with a text input field containing the placeholder "Type for hints...". Below the filters are two buttons: a green "Search" button and a grey "Reset" button. At the bottom, there is a table with three columns: "Customer Name", "Project", and "Project Admins". The table contains one row of data: "Citibank", "Project A", and "Kevin Ryan".

Customer Name	Project	Project Admins
Citibank	Project A	Kevin Ryan

Figure 5.1: Projects

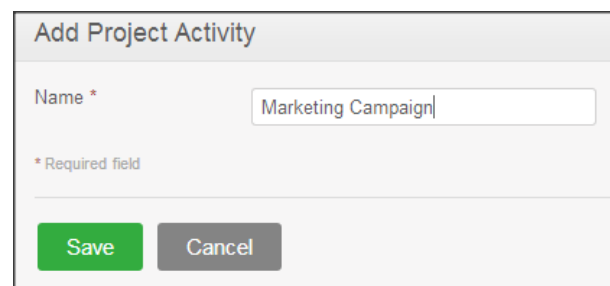
The Project admin can view the project details by clicking on the relevant Project and the screen as shown in Figure 5.2 will appear.



Project		
Customer Name *	Citibank	
Name *	Project A	
Project Admin	Kevin Ryan	
Description		
* Required field		
<input type="button" value="Cancel"/>		
Activities		
<input type="button" value="Add"/>	<input type="button" value="Delete"/>	<input type="button" value="Copy From"/>
<input type="checkbox"/>	Activity Name	
<input type="checkbox"/>	Vendor Management	

Figure 5.2: Project Details

The project admin cannot edit project details. He/she can add project activities by clicking on “Add” and the screen as shown in Figure 5.3 will appear.



Add Project Activity	
Name *	Marketing Campaign
* Required field	
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>

Figure 5.3: Add Project Activity

To edit a project activity, click on the relevant project activity and the screen as shown in Figure 5.4 will appear.

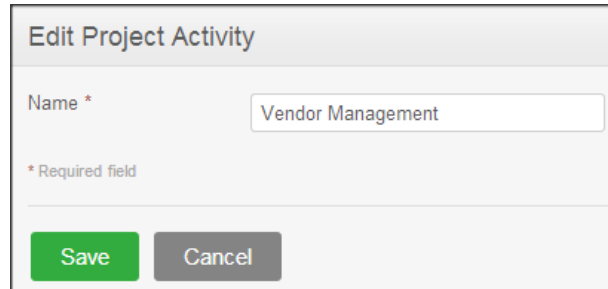


Figure 5.4: Edit Project Activity

You may copy project activities from another project by clicking “Copy From” and the screen as shown in Figure 5.5 will appear. The relevant “Project Name” needs to be entered, after which the “Activities” related to that project will appear. Select the Activity that you wish to copy, and click “Copy”.

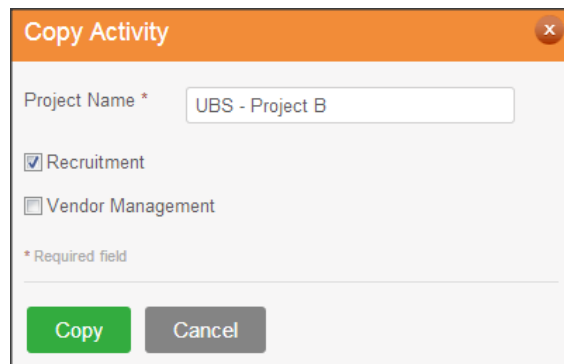


Figure 5.5: Copy Project Activity

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

6.2 Timesheet

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

Also, if he/she has been made a Project Admin of a project, he/she can view information about a project (Figure 5.6), as well as having the privilege of being able to add, delete and copy activities from other projects (Figure 5.7).

Project

Customer Name *

Name *

Project Admin

Description

* Required field

Figure 5.6: Project Information

Activities

<input type="checkbox"/>	Activity Name
<input type="checkbox"/>	Recruitment
<input type="checkbox"/>	Vendor Management

Figure 5.7: Add, Delete, Copy Activities

My Timesheet

You will be able to enter and submit your timesheet for a particular project that you were assigned to. To enter a timesheet, go to **Time>> Timesheets>> My Timesheets** and the screen as shown in Figure 5.8 will appear.

Timesheet for Week

Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Total
No Records Found									

Status: Not Submitted

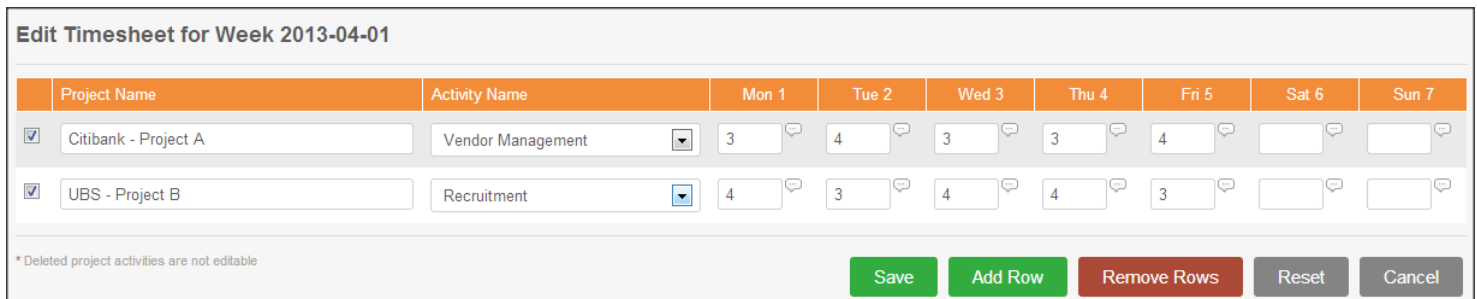
Figure 5.8: Enter Timesheet

The current week will populate under the “Timesheet for Week”. You may also add a timesheet for another week period by clicking “Add Timesheet” and another field, “Select a Day to Create

Timesheet” will appear in which you can select the first day of the week from the drop down menu and the system will automatically calculate a one-week time period from the date entered as shown in Figure 5.8.

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

Once you have determined the week period for the timesheet, you can now enter the timesheet details by clicking “Edit” and the screen as shown in Figure 5.9 will appear.



Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7
<input checked="" type="checkbox"/> Citibank - Project A	Vendor Management	3	4	3	3	4		
<input checked="" type="checkbox"/> UBS - Project B	Recruitment	4	3	4	4	3		

* Deleted project activities are not editable

Save Add Row Remove Rows Reset Cancel

Figure 5.9: Edit Timesheet

The following options are available when editing the timesheet:

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

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

Click on the check box beside the project name before you click “Save” to save the particular records and the screen as shown in Figure 6.0 will appear.

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

Timesheet for Week 2013-04-01 to 2013-04-07 [Add Timesheet](#)

Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Total
Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00	0:00	0:00	17:00
UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00	0:00	0:00	18:00
Total		7:00	7:00	7:00	7:00	7:00	0:00	0:00	35:00

Status: Not Submitted [Edit](#) [Submit](#)

Figure 6.0: Save Timesheet

You may also remove a particular record after the timesheet has been saved by clicking “Edit” and the screen as shown in Figure 6.1 will appear. Click on the check box for the particular row you want removed and click “Remove Rows” and the record will no longer appear on the timesheet record.

Edit Timesheet for Week 2013-04-01

Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7
<input type="checkbox"/> Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00		
<input checked="" type="checkbox"/> UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00		

* Deleted project activities are not editable

[Save](#) [Add Row](#) [Remove Rows](#) [Reset](#) [Cancel](#)

Figure 6.1: Remove Rows

Once the necessary changes have been made, click “Submit” to submit the completed timesheet and you will see the status change from “Not Submitted” to “Submitted” as shown in Figure 6.2.

Timesheet for Week 2013-04-01 to 2013-04-07 [Add Timesheet](#)

Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Total
Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00	0:00	0:00	17:00
UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00	0:00	0:00	18:00
Total		7:00	7:00	7:00	7:00	7:00	0:00	0:00	35:00

Status: Submitted [Edit](#)

Actions Performed on the Timesheet

Action	Performed By	Date	Comment
Submitted	James Olsen	2013-04-02	

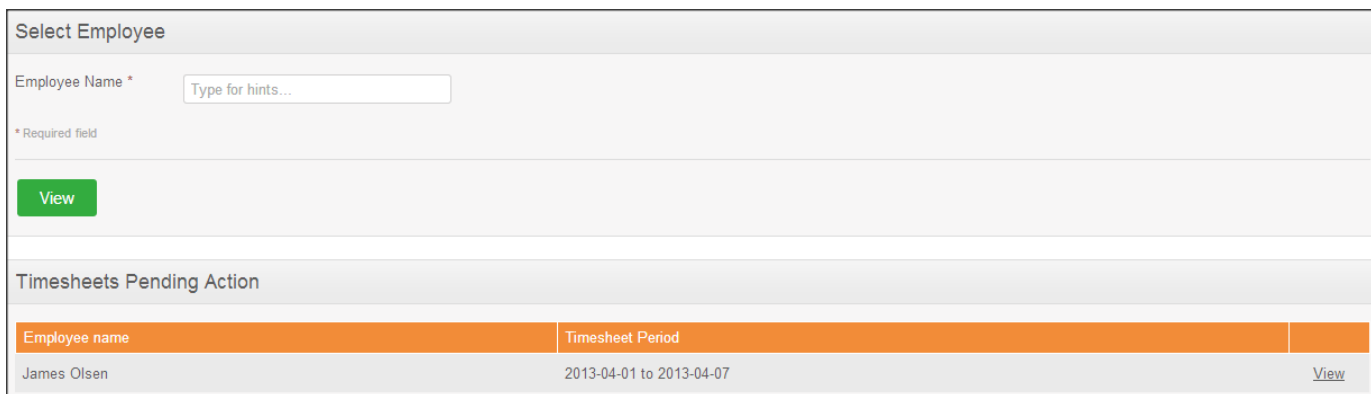
Figure 6.2: Submit Timesheet

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

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

Employee Timesheets

The ESS-Supervisor can view his/her subordinate’s submitted timesheet in which the ESS-Supervisor can either approve/reject the timesheet. You can also enter and submit your employee’s timesheet. To view employee’s submitted timesheet, go to **Time >> Timesheet >>Employee Timesheet** and the screen as shown in Figure 6.3 will appear.



Select Employee

Employee Name *

* Required field

[View](#)

Timesheets Pending Action

Employee name	Timesheet Period	
James Olsen	2013-04-01 to 2013-04-07	View

Figure 6.3: ESS Supervisor View Employee’s Submitted Timesheet

You may search and view employee’s timesheet through the “Select Employee” and by entering the employee name and clicking “View”.

Timesheet with pending action can also be viewed on the screen. Click “View” to see the details of the timesheet under “Timesheets Pending Action” and the screen as shown in Figure 6.4 will appear.

Timesheet for James Olsen for Week [Add Timesheet](#)

Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Total
Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00	0:00	0:00	17:00
UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00	0:00	0:00	18:00
Total		7:00	7:00	7:00	7:00	7:00	0:00	0:00	35:00

Status: Submitted [Edit](#)

Timesheet Action

Comment

[Approve](#) [Reject](#)

Figure 6.4: ESS-Supervisor View/Edit/Approve/Reject Timesheet

You can approve or reject a timesheet and also enter a comment. You can also edit the timesheet by clicking “Edit”, if there are any discrepancies before approving or rejecting the timesheet.

Once approved or rejected the particular employee will also be updated with the status and the status will change from “Submitted” to either “Approved” or “Rejected” when the employee-subordinate logs into the system and checks his/her timesheet status. The action performed by the supervisor will then be listed under “Actions Performed on the Timesheet” as shown in Figure 6.5.

Actions Performed on the Timesheet			
Action	Performed By	Date	Comment
Submitted	James Olsen	2013-04-02	
Approved	Kevin Ryan	2013-04-02	

Figure 6.5: Actions Performed on the Timesheet by ESS-Supervisor

6.3 Attendance

All attendance records of the ESS-Supervisor and his/her subordinates are maintained and recorded under “Attendance” menu.

You are able to do the following task under this feature:

- Punch In/Out
- View personal attendance records
- View subordinates' attendance records

Punch In/Punch Out

This feature allows capturing the number of hours that you have spent while working for the company. To access the Punch In/Out tab, go to **Time>> Attendance>>Punch In/Out** and the screen as shown in Figure 6.6 will appear.

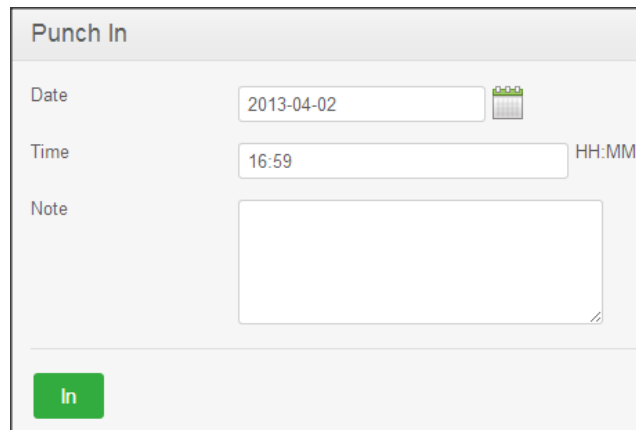


Figure 6.6: Punch In


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

Enter the relevant fields and click “In”. The screen as shown in Figure 6.7 will then appear.

The details of your last punch in time will be populated below the screen as shown in Figure in 6.7. To punch out, click “Out”.

Punch Out

Punched in Time 2013-04-02 16:59

Date 

Time HH:MM

Note

Figure 6.7: Punch Out

My Records

Once you have entered your Punch In/Out details, it will be listed under “My Records”. To view details, go to **Time>> Attendance>> My Records** and the screen as shown in Figure 6.8 will appear.

My Attendance Records

Date 

Figure 6.8: View My Records

Enter the date you want the attendance record to be shown for and the screen as shown in Figure 6.9 will appear.

Edit		Delete			
Punch In	Punch In Note	Punch Out	Punch Out Note	Duration(Hours)	
<input type="checkbox"/>	2013-04-05 17:26:00 GMT 5.5		2013-04-05 21:29:00 GMT 5.5		4.05
Total					4.05

Figure 6.9: “My Records” in Detail

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

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

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

To view employee records, go to **Time>> Attendance>> Employee Records** and the screen as shown in Figure 7.0 will appear.

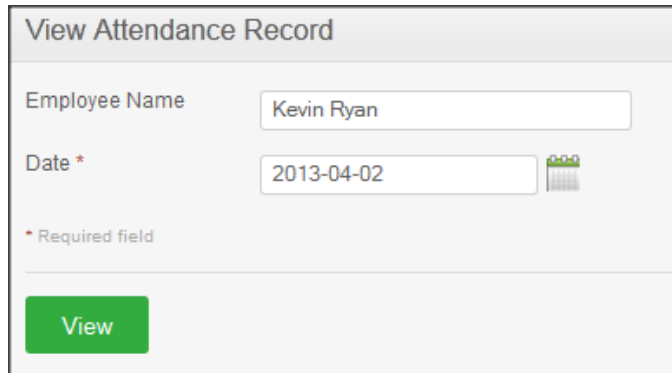
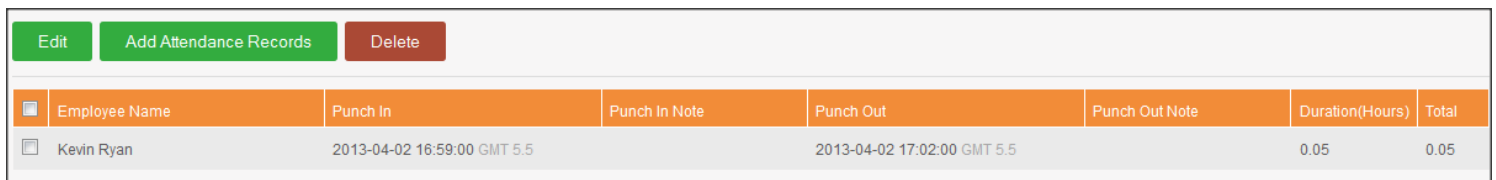


Figure 7.0: View Employee Records

You may enter the “Employee Name” and the “Date” you want to view the attendance record for and the screen as shown in Figure 7.1 will appear.



<input type="checkbox"/>	Employee Name	Punch In	Punch In Note	Punch Out	Punch Out Note	Duration(Hours)	Total
<input type="checkbox"/>	Kevin Ryan	2013-04-02 16:59:00 GMT 5.5		2013-04-02 17:02:00 GMT 5.5		0.05	0.05

Figure 7.1: Employee Record in Detail

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

To delete the record, click on the check box beside the record and click “Delete”.

To add another attendance record, click “Add Attendance Records” and enter the appropriate details.

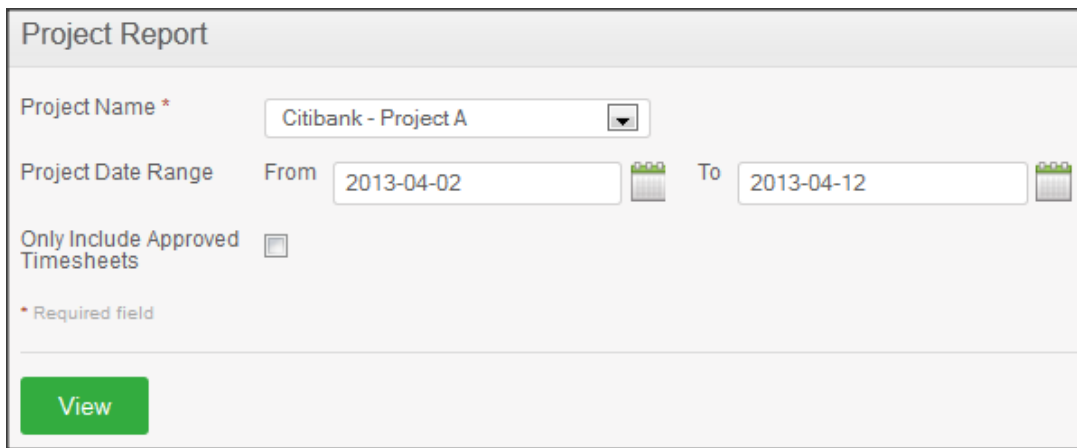
***Note:** To add another attendance record, click on the “Add Attendance Records twice for punch in and punch out.

6.4 Reports

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

Project Report

This feature gives the ESS–Supervisor the ability to view reports of projects administered by them or projects assigned to them. To view project reports go to **Time>> Reports>> Project Reports** and the screen as shown in Figure 7.2 will appear.

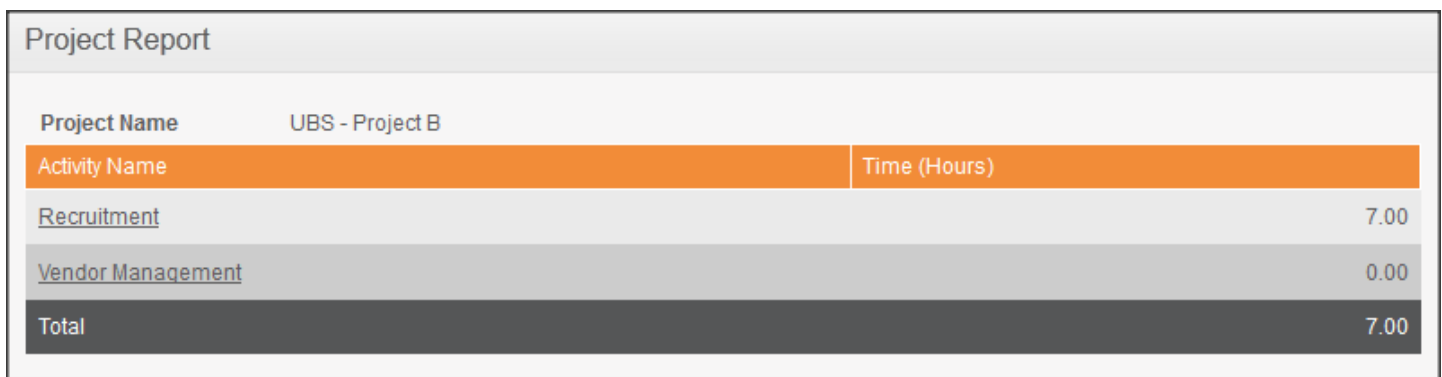


The screenshot shows a web form titled "Project Report". It contains the following fields:

- Project Name ***: A dropdown menu with "Citibank - Project A" selected.
- Project Date Range**: "From" date field with "2013-04-02" and "To" date field with "2013-04-12".
- Only Include Approved Timesheets**: A checkbox that is currently unchecked.
- A red asterisk and the text "* Required field" are located below the date range fields.
- A green "View" button is positioned at the bottom left of the form.

Figure 7.2: View Project Report

Select the “Project Name” from the drop down menu and the “Project Date Range” by selecting the dates. The default project name is “All”. You may also click on the “Only Include Approved Timesheets” if you want to view only projects reports with approved timesheets. Click “View” once completed and the screen as shown in Figure 7.3 will appear.



The screenshot shows the result of the report, displayed as a table within a grey header box titled "Project Report".

Project Report	
Project Name	UBS - Project B
Activity Name	Time (Hours)
Recruitment	7.00
Vendor Management	0.00
Total	7.00

Figure 7.3: Project Report

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

To view an employee report, go to **Time>> Reports>>Employee Reports** and the screen as shown in Figure 7.4 will appear.

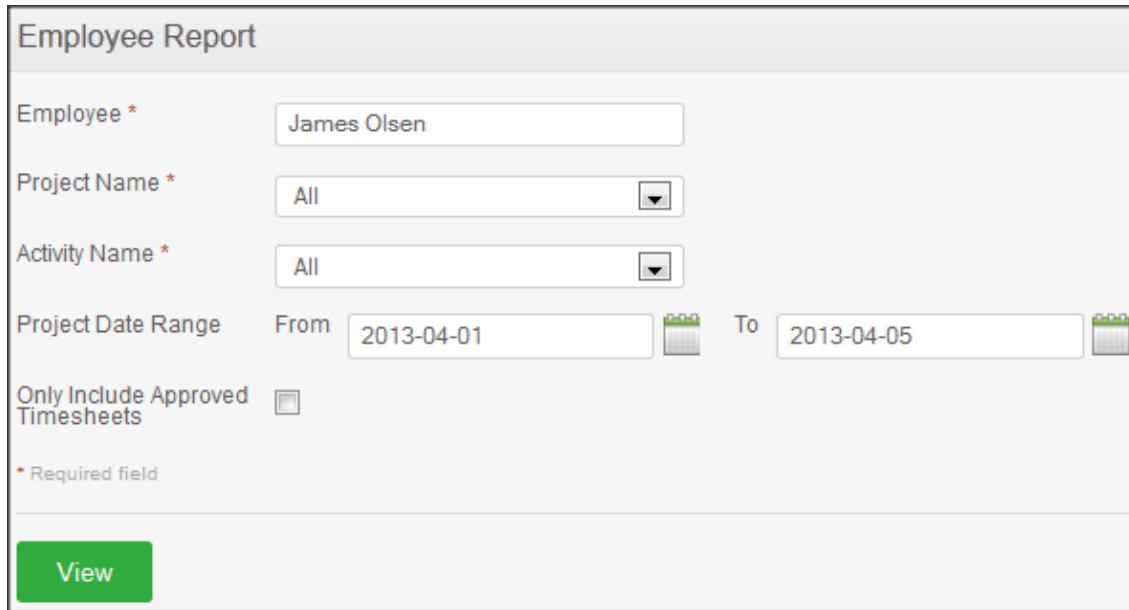
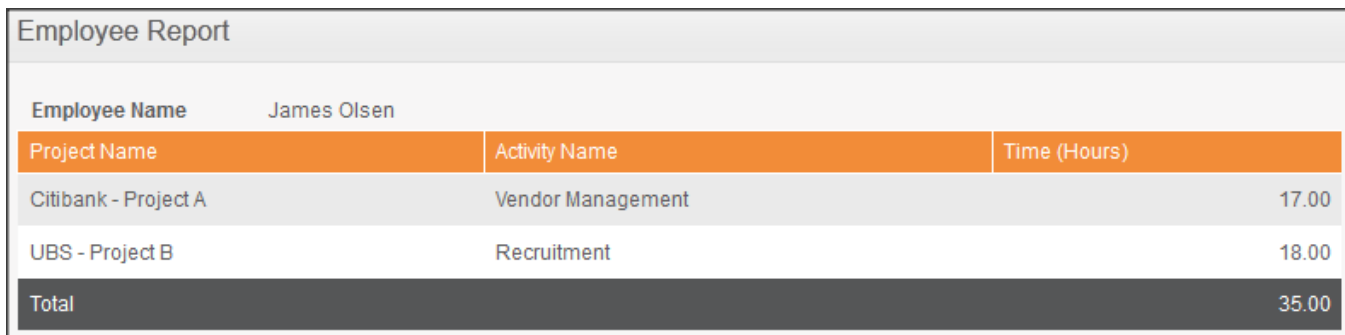


Figure 7.4: Run Employee Report

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

Click “View” once completed and the screen as shown in Figure 7.5.

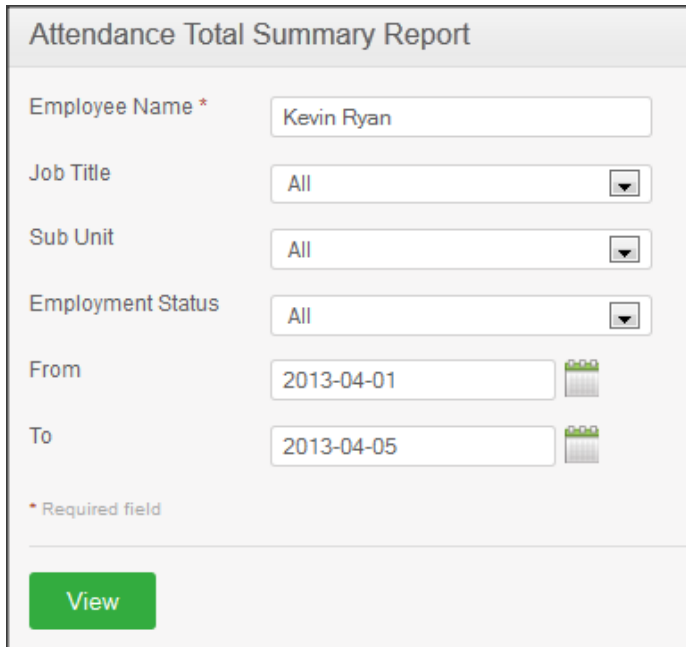


Employee Report		
Employee Name	James Olsen	
Project Name	Activity Name	Time (Hours)
Citibank - Project A	Vendor Management	17.00
UBS - Project B	Recruitment	18.00
Total		35.00

Figure 7.5: Employee Report

The ESS-Supervisor can view the attendance summary of his/her subordinates where the ESS - Supervisor can track the time employees have spent working in the company.

To view an employee’s attendance summary, go to **Time>> Reports>>Attendance Summary** and the screen as shown in Figure 7.6 will appear.



Attendance Total Summary Report

Employee Name *

Job Title

Sub Unit

Employment Status

From

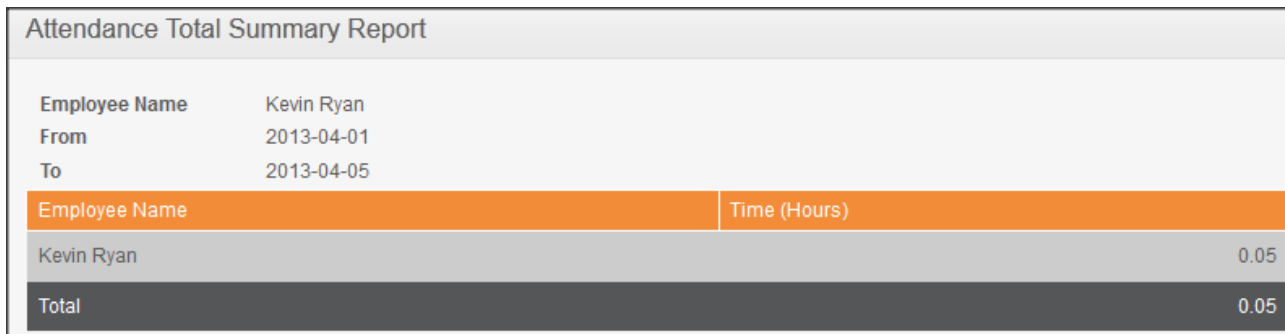
To

* Required field

Figure 7.6: Run Attendance Summary Report

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

Click “View” and the screen as shown in Figure 7.7 will appear.



Attendance Total Summary Report	
Employee Name	Kevin Ryan
From	2013-04-01
To	2013-04-05
Employee Name	Time (Hours)
Kevin Ryan	0.05
Total	0.05

Figure 7.7: Attendance Summary Report

7.0 Performance Module

The ESS-Supervisor will be able to view his scheduled performance review by his particular supervisor/reviewer, as well as the performance review of an employee where the ESS-Supervisor was assigned as the reviewer. To view performance review, go to **Performance>> Manage Reviews >> My Reviews** and the screen as shown in Figure 5.7 will appear.

My Review List					
Employee	Due Date	Review Period	Job Title	Review Status	Evaluation Status
<u>Ashley Abel</u>	2014-10-03	2014-10-01 - 2014-10-03	QA Level II	Approved	Completed

Figure 5.7: My Review Summary

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

The outcome of the review will not be visible to the ESS-User.

Further, ESS-Supervisor will be able to view the trackers assigned for him. To view your trackers, go to **Performance>> My Trackers**, performance trackers will be listed and the screen as shown in Figure 5.7 will appear.

Performance Trackers			
Employee	Tracker	Added Date	Modified Date
<u>James Abrahamson</u>	<u>Tracker for James</u>	2014-10-22	

Figure 19.6: My Tracker List

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

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

Search Performance Reviews

Employee Name <input type="text" value="Type for hints..."/>	Job Title <input type="text" value="All"/>	Status <input type="text" value="All"/>	From Date <input type="text" value="yyyy-mm-dd"/>
To Date <input type="text" value="yyyy-mm-dd"/>	Reviewer <input type="text" value="Type for hints..."/>		

Review List

	Employee	Due Date	Review Period	Job Title	Status	Action
<input type="checkbox"/>	Ashley Abel	2014-10-03	2014-10-01 - 2014-10-03	QA Level II	Approved	Evaluate
<input type="checkbox"/>	James Abrahamson	2014-10-31	2014-10-01 - 2014-10-30	QA Level II	Activated	Evaluate
<input type="checkbox"/>	James Abrahamson	2014-10-31	2014-10-01 - 2014-10-30	Sales Engineer	Activated	Evaluate

Figure 19.2: Performance Review List

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

10.6 Search Reviews

This feature allows you to search reviews based on his/her job role, review status etc. To search an employee’s performance review, go to Performance>>Manage Reviews>>Review List and the screen as shown in Figure 19.3 will appear.

Search Performance Reviews

Employee Name <input type="text" value="Type for hints..."/>	Job Title <input type="text" value="All"/>	Status <input type="text" value="All"/>	From Date <input type="text" value="yyyy-mm-dd"/>
To Date <input type="text" value="yyyy-mm-dd"/>	Reviewer <input type="text" value="Type for hints..."/>		

Review List

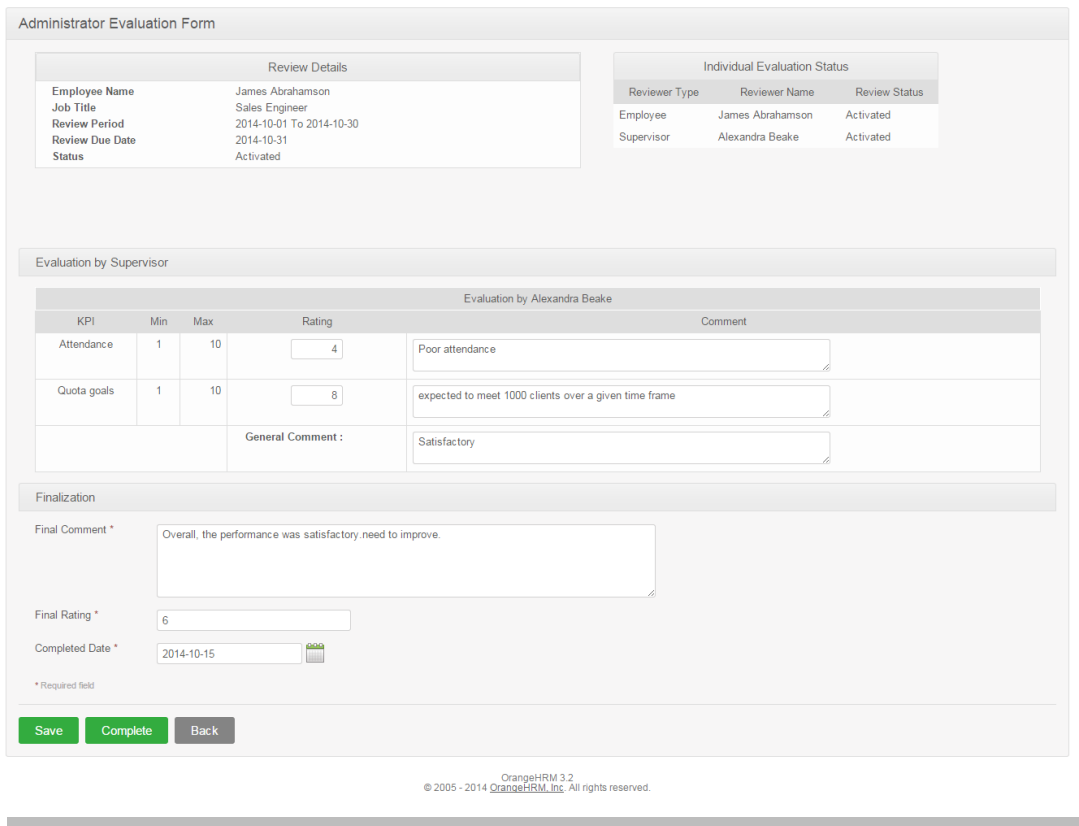
	Employee	Due Date	Review Period	Job Title	Status	Action
<input type="checkbox"/>	Ashley Abel	2014-10-03	2014-10-01 - 2014-10-03	QA Level II	Approved	Evaluate

Figure 19.3: Search Performance Reviews

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

- From – To: The date period for the particular performance review
- Job Title: employees with the specified job title to be reviewed
- Status: the status of the Performance reviews
- Employee: the employee’s name
- Reviewer: the reviewer’s name

Simply click on the Evaluate link to initiate the performance review and the screen as shown in Figure 19.4 will appear.



Administrator Evaluation Form

Review Details	
Employee Name	James Abrahamson
Job Title	Sales Engineer
Review Period	2014-10-01 To 2014-10-30
Review Due Date	2014-10-31
Status	Activated

Individual Evaluation Status		
Reviewer Type	Reviewer Name	Review Status
Employee	James Abrahamson	Activated
Supervisor	Alexandra Beake	Activated

Evaluation by Supervisor

Evaluation by Alexandra Beake

KPI	Min	Max	Rating	Comment
Attendance	1	10	4	Poor attendance
Quota goals	1	10	8	expected to meet 1000 clients over a given time frame
General Comment :			Satisfactory	

Finalization

Final Comment *
Overall, the performance was satisfactory.need to improve.

Final Rating *
6

Completed Date *
2014-10-15

* Required field

Save **Complete** **Back**

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Figure 19.4: Performance Review of an employee

Click “Edit” to enter details:

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

10.7 Performance Trackers

This feature allows you to track an employee's performance by adding a tracker log, positive/negative feedback and a comment. To track an employee's performance, go to Performance>>Employee Trackers and click on add button and the screen as shown in Figure 19.5 will appear.

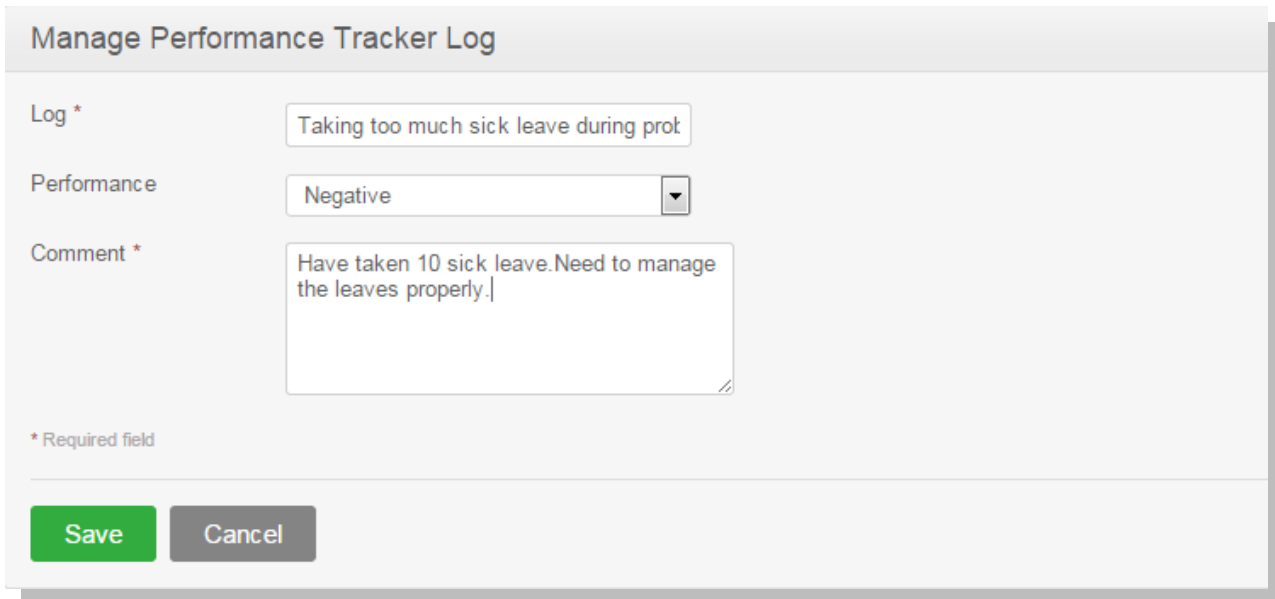
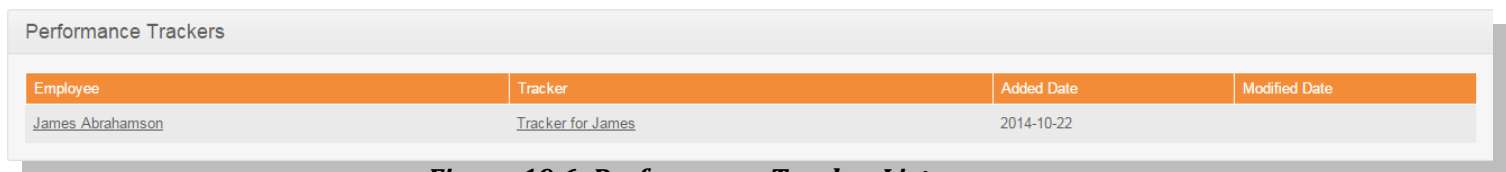


Figure 19.5: Manage Performance Tracker Log

Enter the following details and click “Save and the list of performance trackers will be listed as shown in Figure 19.6.



Employee	Tracker	Added Date	Modified Date
James Abrahamson	Tracker for James	2014-10-22	

Figure 19.6: Performance Tracker List

8.0 Dashboard

The Dashboard is a page which provides:

- A summary of vital information (Eg: Pending Leave Requests)
- Quick access to certain tasks (Eg: Leave list and timesheets of subordinates)
- Ideally, it tries to make important information available in one glance/ in one click
- Dashboard forms the Home page of every user, and can be accessed by clicking on “**Dashboard**”.

Figure 19.7 shows the Dashboard module.

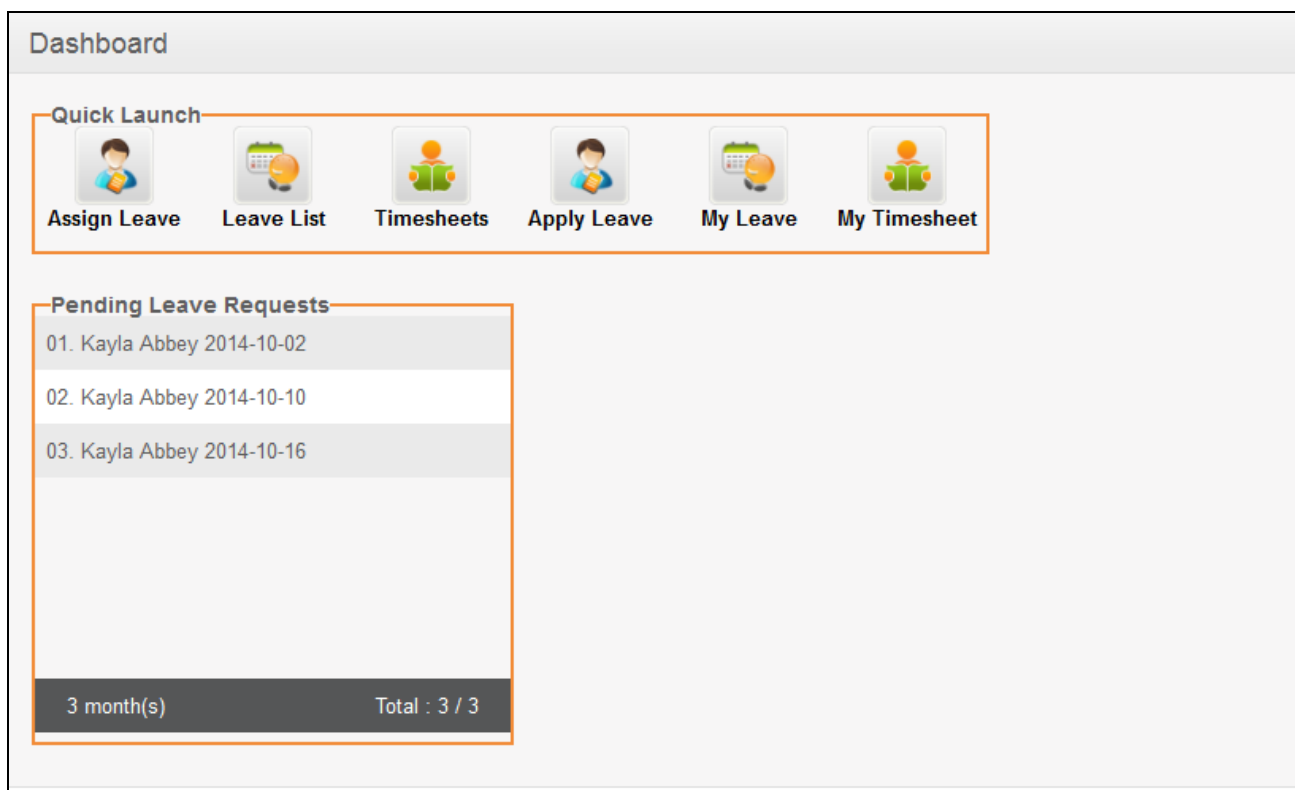


Figure 19.7: Dashboard

8.1 Quick Launch Panel

This panel contains some shortcuts for invoking certain menu items, as shown in Figure 19.8.

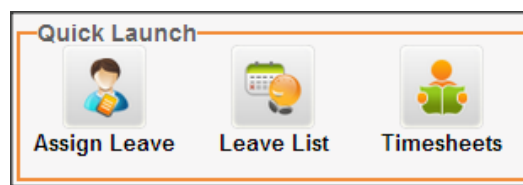


Figure 19.8: Quick Launch Panel

Following are the shortcuts shown for ESS users:

- Apply Leave
- My Leave
- My Timesheets

Following are the shortcuts shown for Supervisors:

- Assign Leave
- Timesheets
- Leave List

8.2 Task List Panel

This panel lists tasks a supervisor/admin needs to perform and is not visible for ESS users who are not supervisors as shown in Figure 19.9.



The screenshot shows a panel titled "Pending Leave Requests" with a list of five items. Each item consists of a number, an employee name, and a date. The items are: 01. Jennifer Brown 2013-03-12, 02. Anthony Nolan 2013-04-02, 03. Anthony Nolan 2013-04-08, 04. Kevin Mathews 2013-04-09, and 05. Kevin Mathews 2013-04-16. At the bottom of the panel, there is a dark bar with the text "3 month(s)" on the left and "Total : 0 / 0" on the right.

Pending Leave Requests		
01.	Jennifer Brown	2013-03-12
02.	Anthony Nolan	2013-04-02
03.	Anthony Nolan	2013-04-08
04.	Kevin Mathews	2013-04-09
05.	Kevin Mathews	2013-04-16

3 month(s) Total : 0 / 0

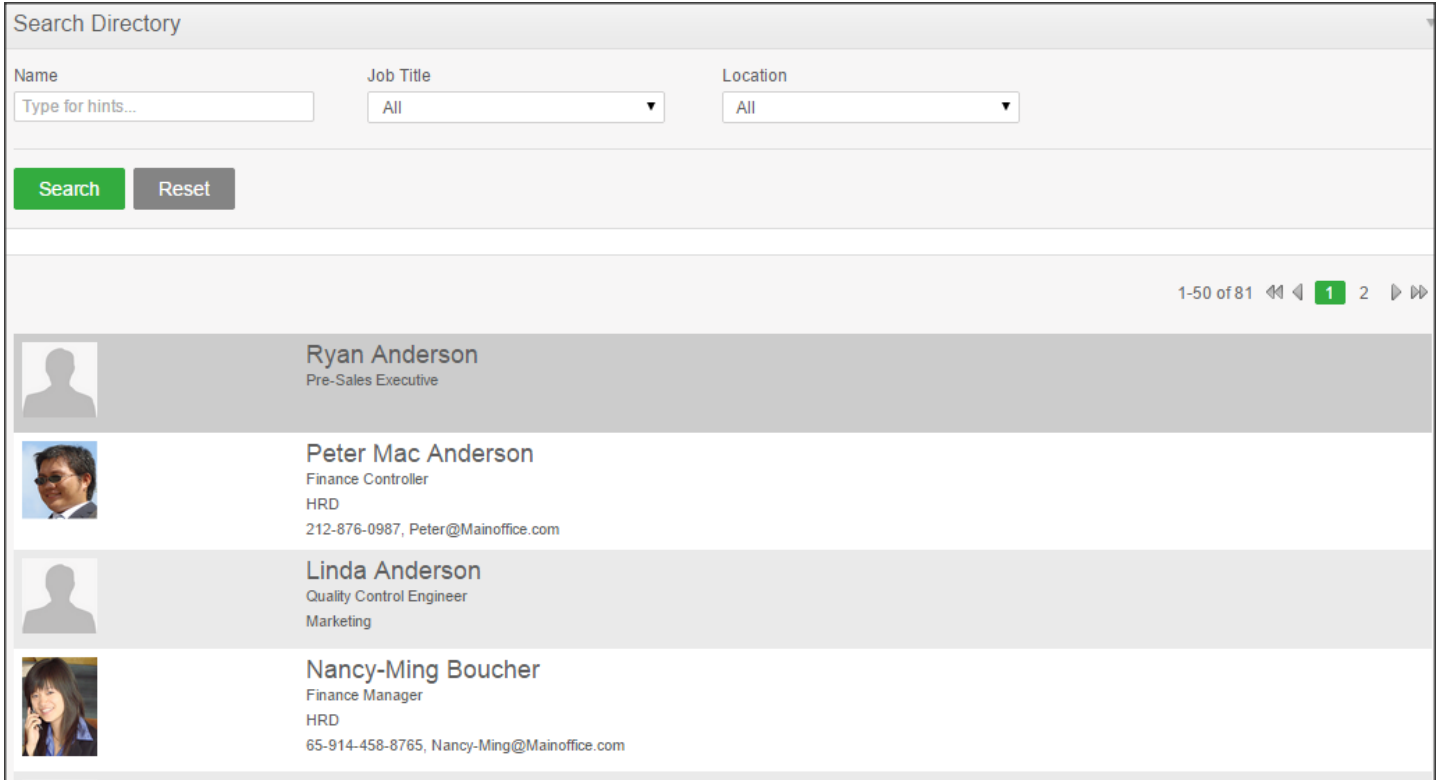
Figure 19.9: Task List Panel

Pending Leave Requests Panel

- Pending Leave Requests of subordinates are shown with their name and starting date of the leave application (Administrators see a list of employees according to their region and privilege)
- Clicking on an item takes the user to the detailed view of the leave list
- Items are ordered according to the leave start date, and then by the employee's last name.

9.0 Corporate Directory

Corporate directory is the place where users can view public information about the rest of the employees in the company, and can be accessed by clicking on “**Directory**” in the menu.



The screenshot shows a search interface for the Corporate Directory. At the top, there is a search bar with the text "Search Directory". Below it, there are three input fields: "Name" with a placeholder "Type for hints...", "Job Title" with a dropdown menu set to "All", and "Location" with a dropdown menu set to "All". Below these fields are two buttons: "Search" (green) and "Reset" (grey). The search results are displayed in a list format, showing employee profiles. Each profile includes a small profile picture, the employee's name, job title, and subunit. The first profile is for Ryan Anderson, Pre-Sales Executive. The second is for Peter Mac Anderson, Finance Controller, HRD, with contact information: 212-876-0987, Peter@Mainoffice.com. The third is for Linda Anderson, Quality Control Engineer, Marketing. The fourth is for Nancy-Ming Boucher, Finance Manager, HRD, with contact information: 65-914-458-8765, Nancy-Ming@Mainoffice.com. In the top right corner of the results area, there is a pagination indicator showing "1-50 of 81" and a page number "1" highlighted in green.

Figure 12.0: Corporate Directory

Users can:

- Access the corporate directory – can be accessed by clicking on “**Directory**” in the main menu.
- Search listings –
 - The following search criteria are available
 - Name - Auto suggestion
 - Job Title - Auto suggestion
 - Location - Drop Down
- View search results –
 - All employees are listed in a paginated view sorted by their last name.
 - The following information are considered public and displayed in directory listing:
#Image #Full name #Job Title #Subunit
#Location #Contact Number (work phone) #Email (work email)

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