ESS-Supervisor User Manual for OrangeHRM OS v3.3

Contents

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.

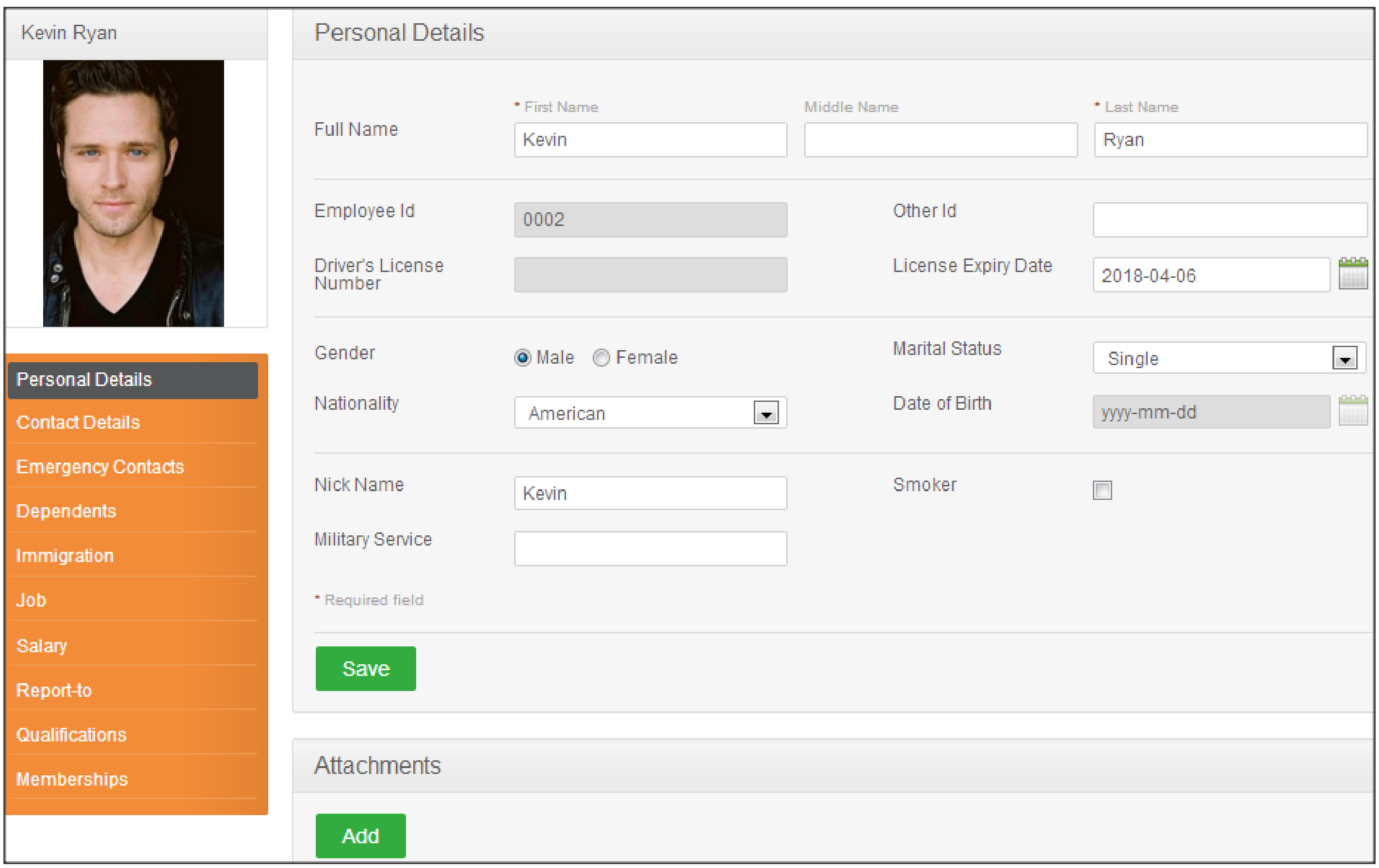


Figure 1.2: Personal Details

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.

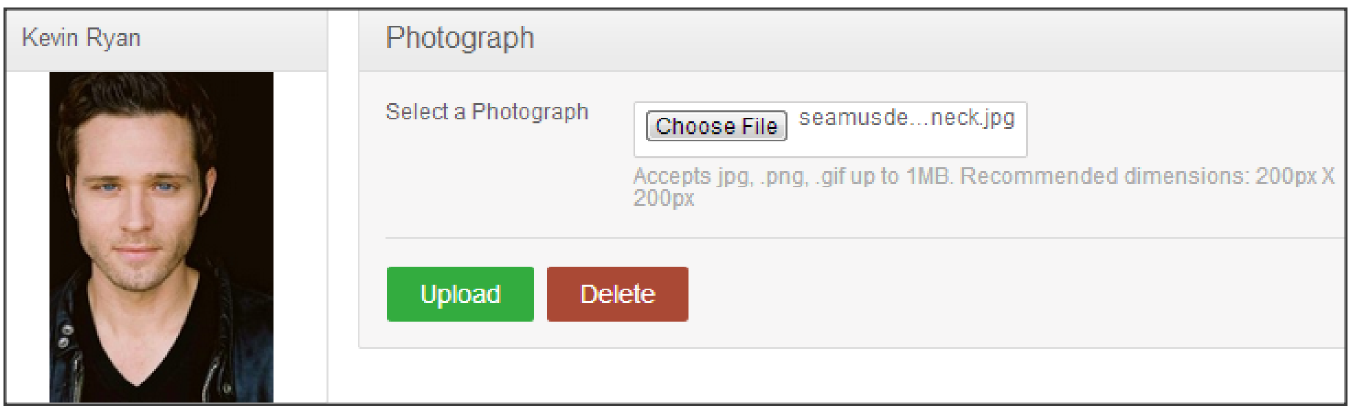


Figure 1.3: Photograph

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

*Note: You may only upload 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.

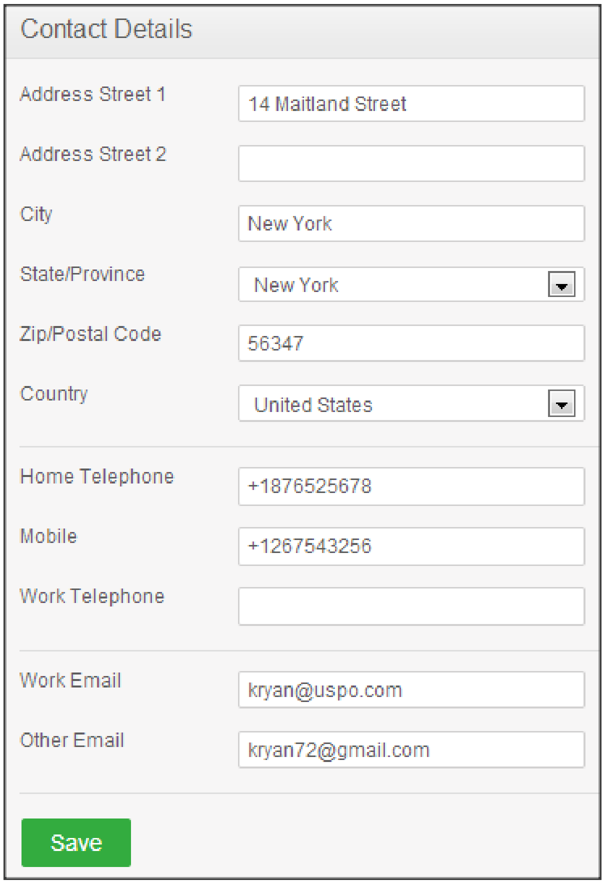


Figure 1.4: Contact Details

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 Sates you can select from the drop down or you need to enter it manually
- ZIP Code
- Home Telephone
- Mobile
- Work Telephone
- Work Email
- Other Email

Once you have completed this form click "Save".

3.4 Emergency 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.

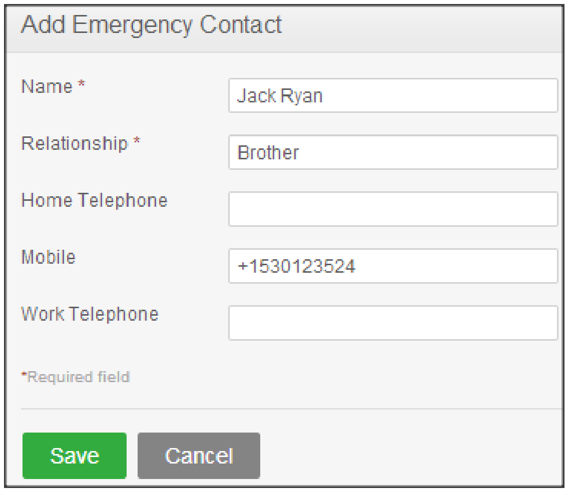


Figure 1.5: Add Emergency Contact

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

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

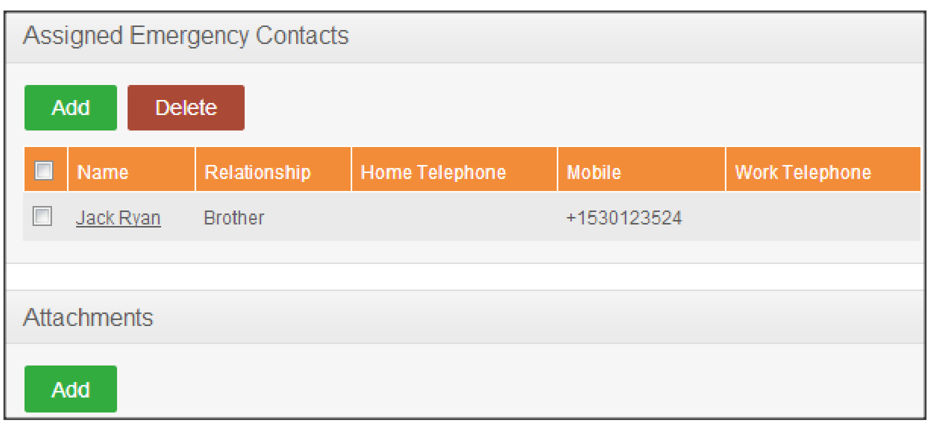


Figure 1.6: Assigned Emergency Contacts

You may add multiple entries of emergency 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.

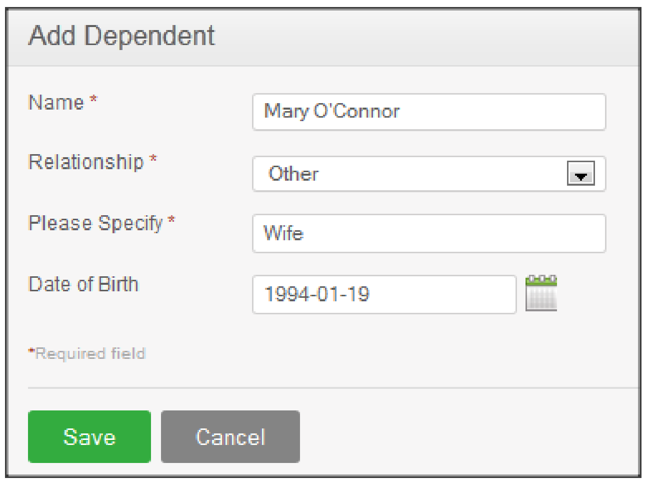


Figure 1.7: Add Dependents

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

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

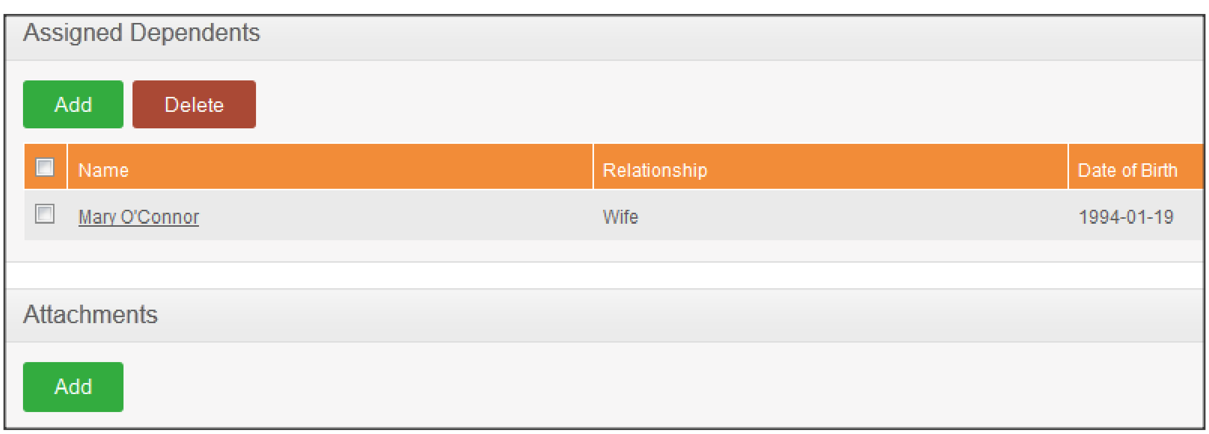


Figure 1.8: Assigned Dependents

You may add multiple entries of dependents.

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

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

3.6 Immigration

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

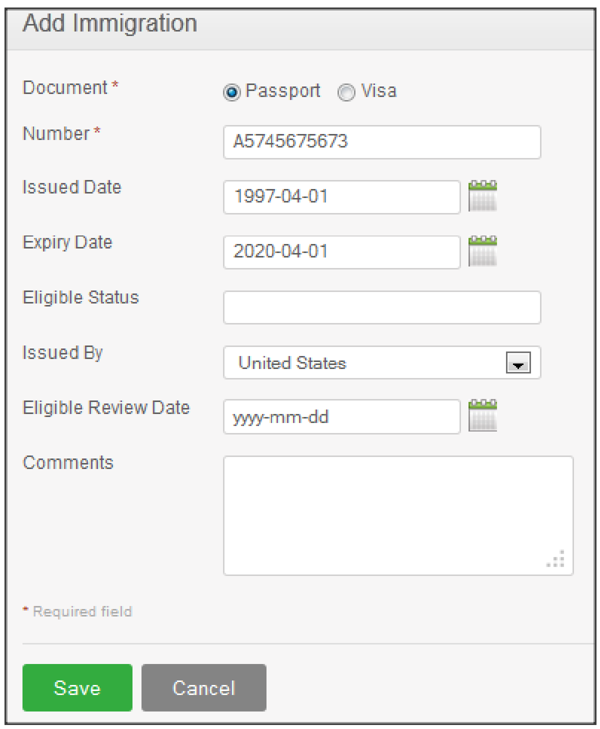


Figure 1.9: Add Immigration

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.

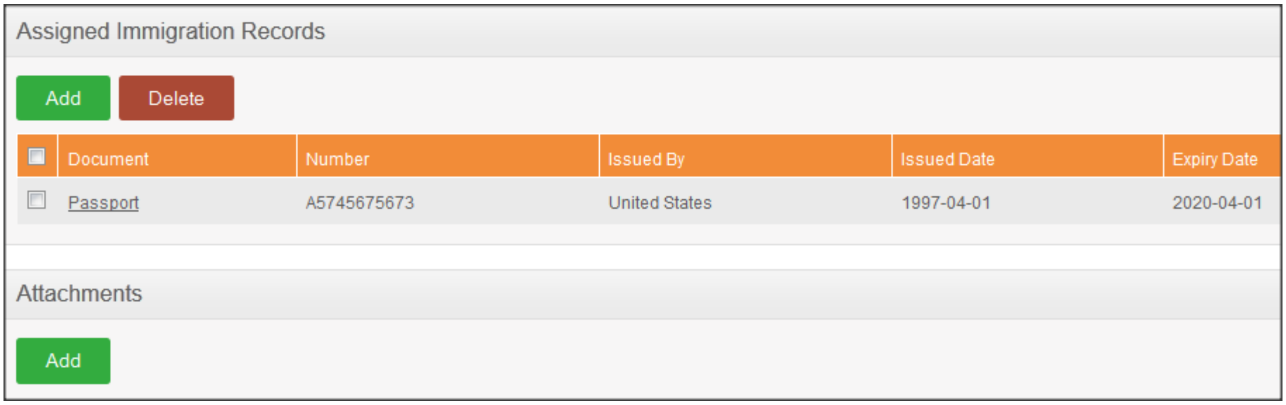


Figure 2.0: Assigned Immigration Documents

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

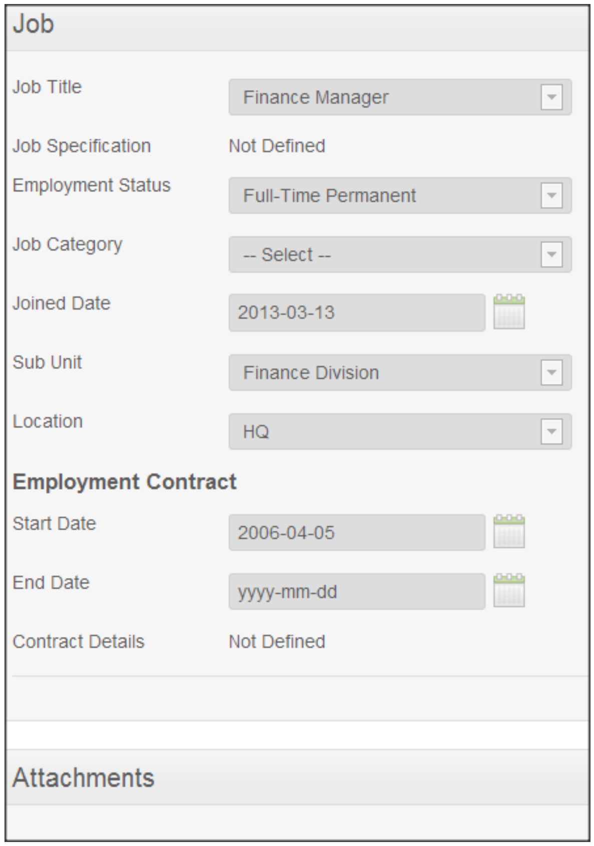


Figure 2.1: Job Details

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.

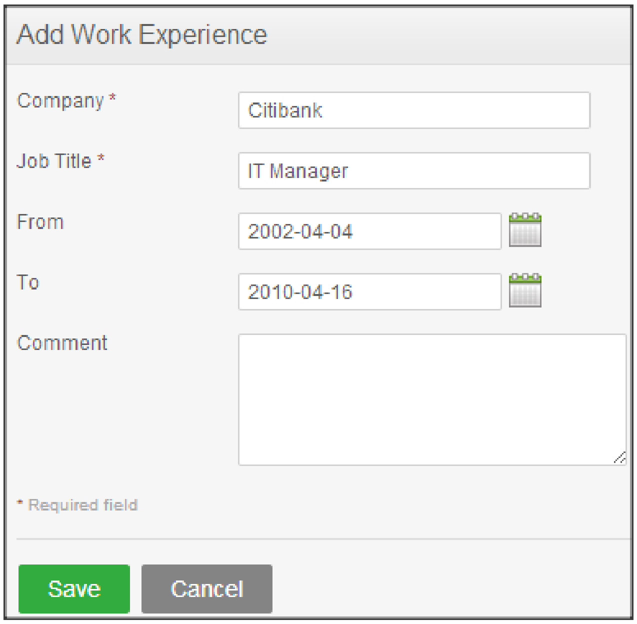


Figure 2.4: Add Work Experience

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

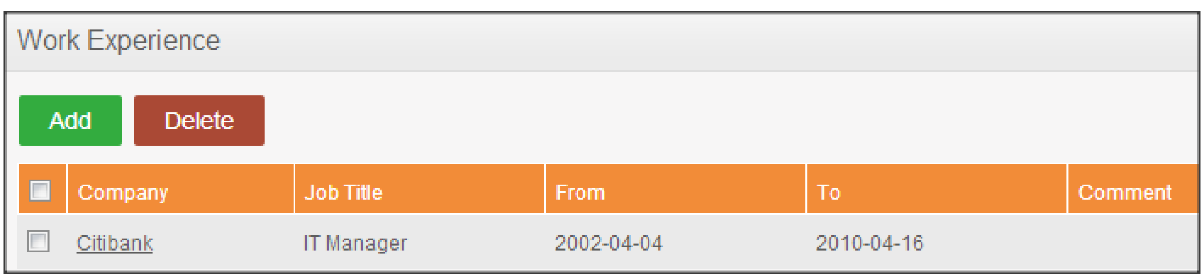


Figure 2.5: Work Experience List

You may enter multiple entries of 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".

Education

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.

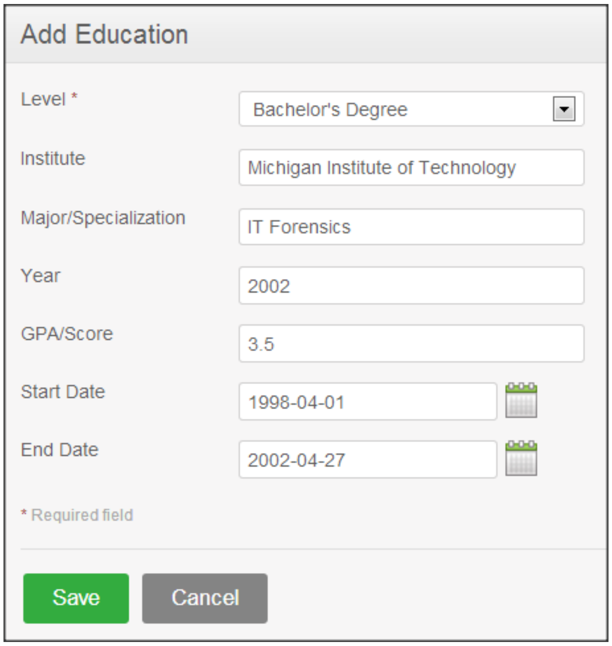


Figure 2.6: Add Education

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

Figure 2.7: 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”.

Skills

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.

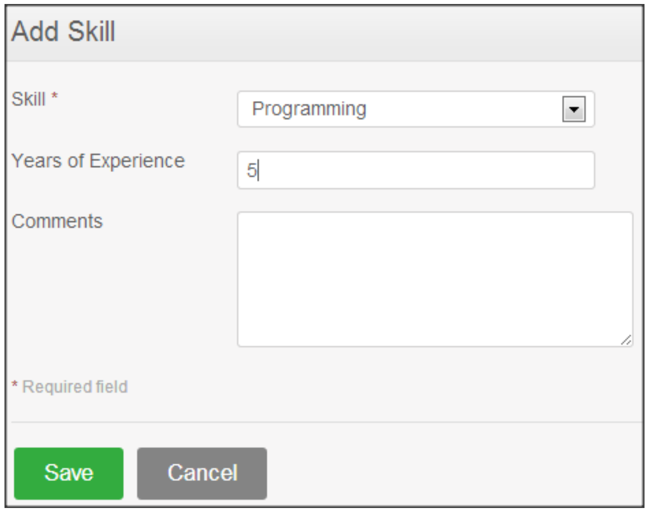


Figure 2.8: Add Skill

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

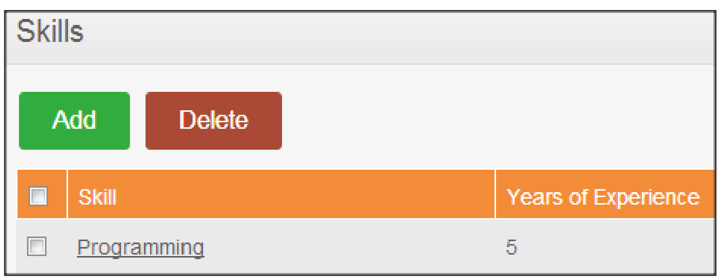


Figure 2.9: List of Skills

You may enter multiple entries of skills.

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

Languages

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

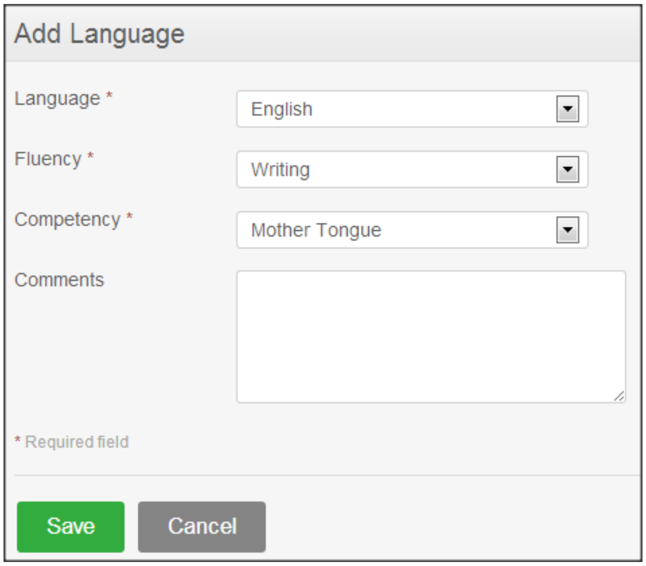


Figure 3.0: Add Language

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

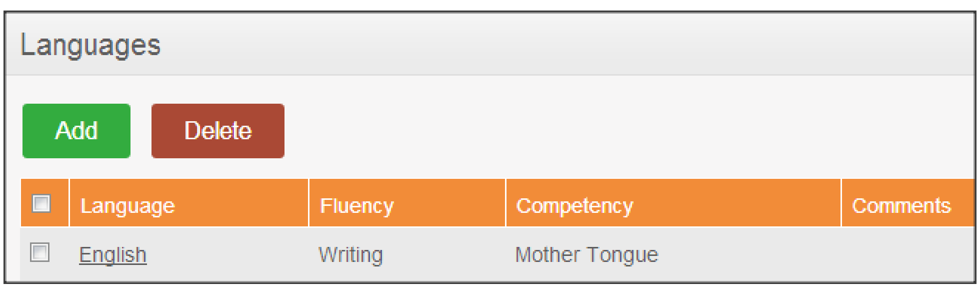


Figure 3.1: List of Languages of Competency

You may enter multiple entries of languages.

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

License

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

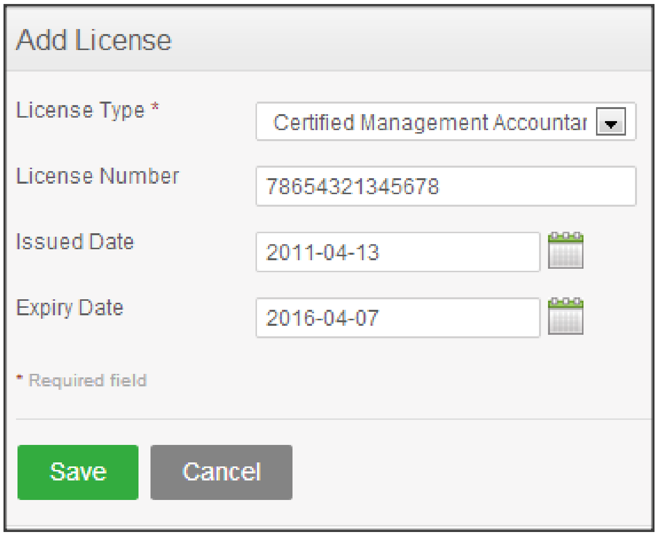


Figure 3.2: Add License

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

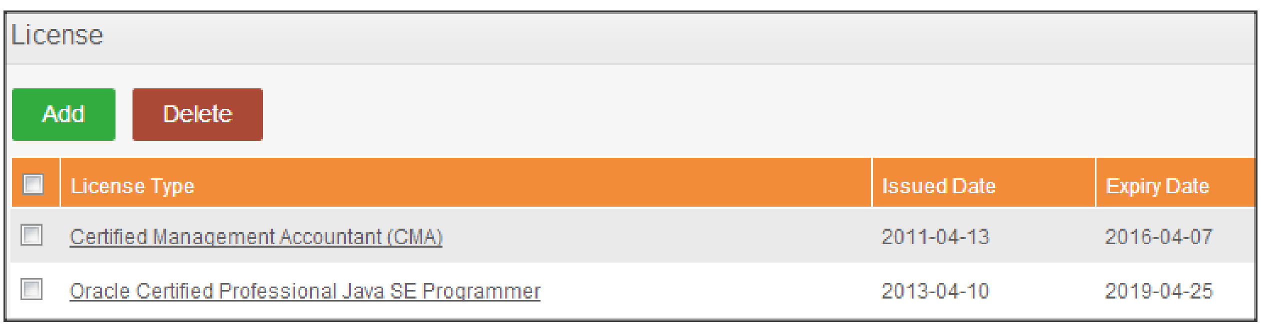


Figure 3.3: List of Licenses

You may enter multiple entries of licenses.

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

OrangeHRM

Attachments

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

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

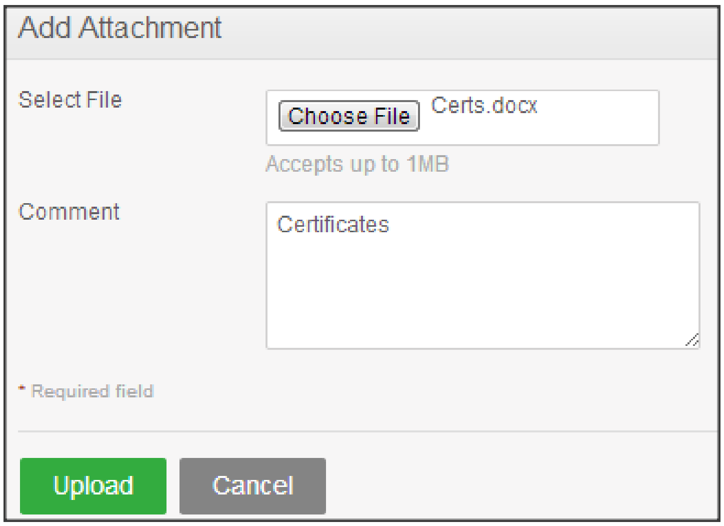


Figure 3.4: Add Attachment

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

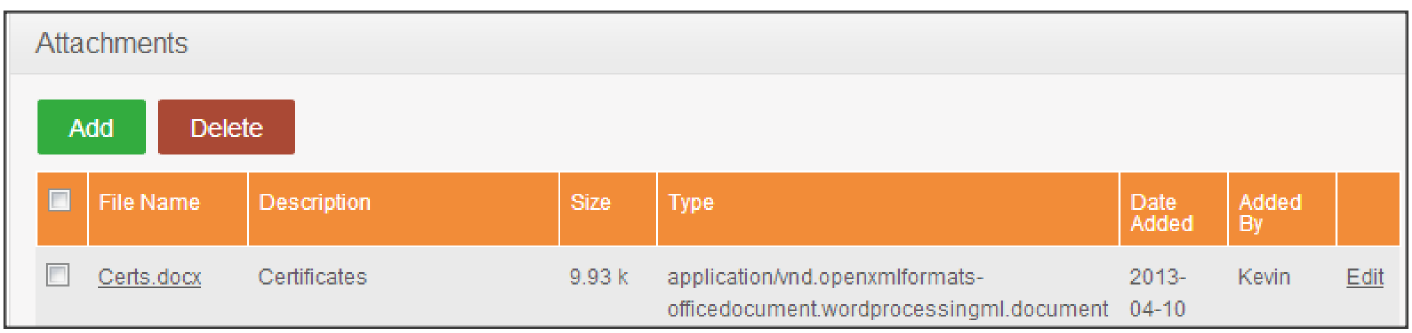


Figure 3.5: List of Attachments

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.

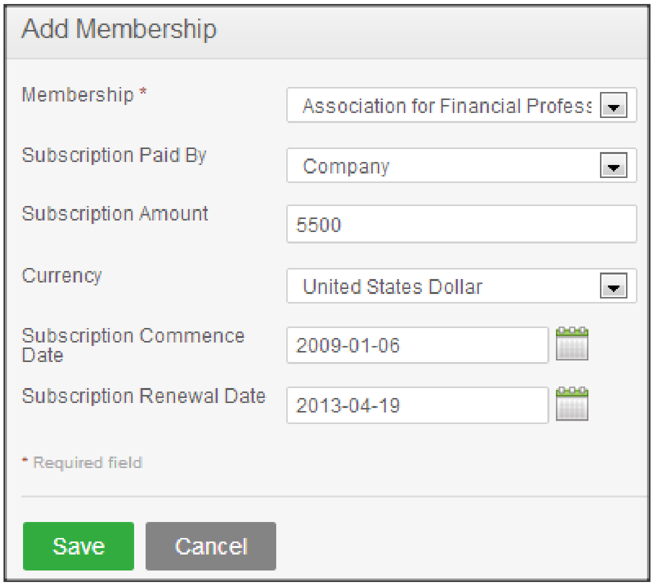


Figure 3.6: Add Membership Details

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

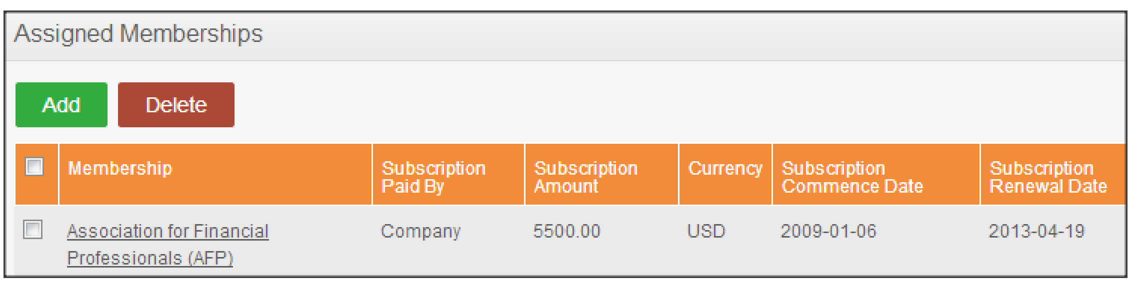


Figure 3.7: Assigned Memberships

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.

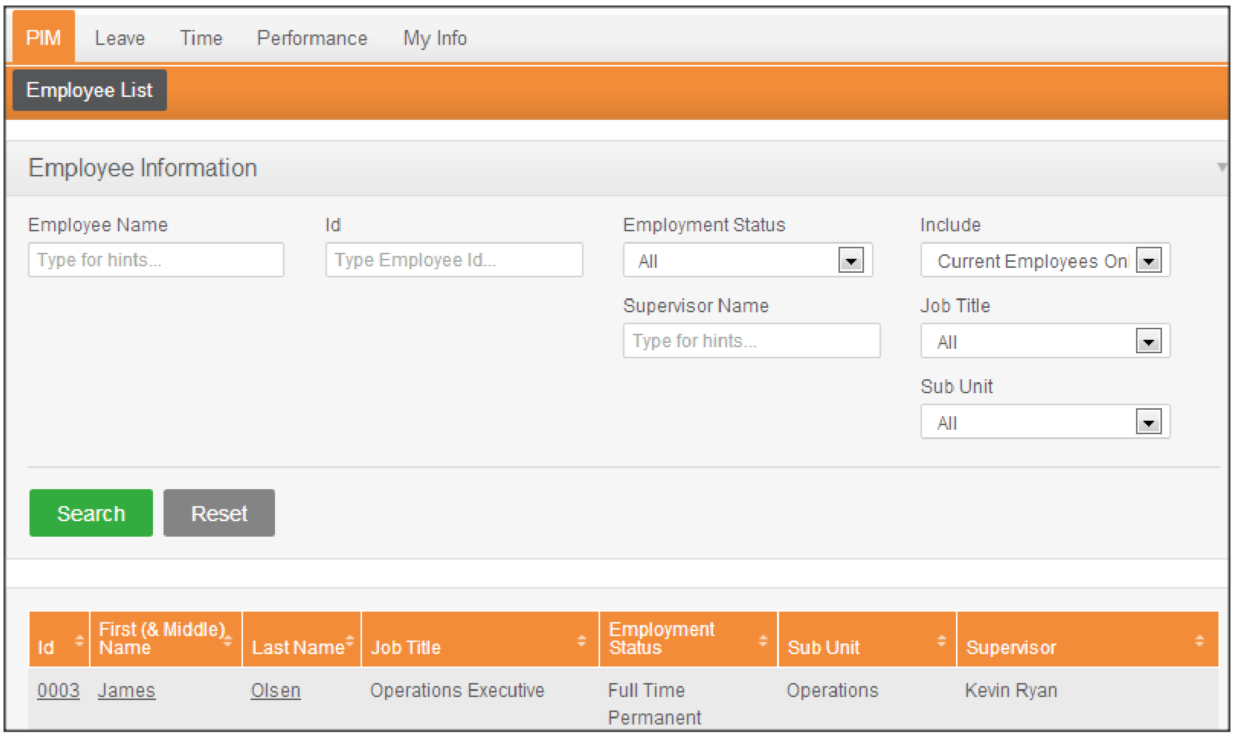


Figure 3.8: Employee Information

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.

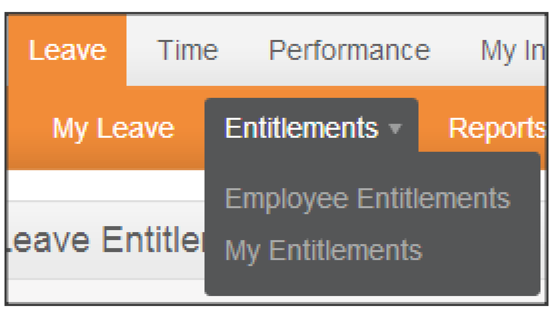


Figure 3.9: ESS-Supervisor Entitlements menu

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.

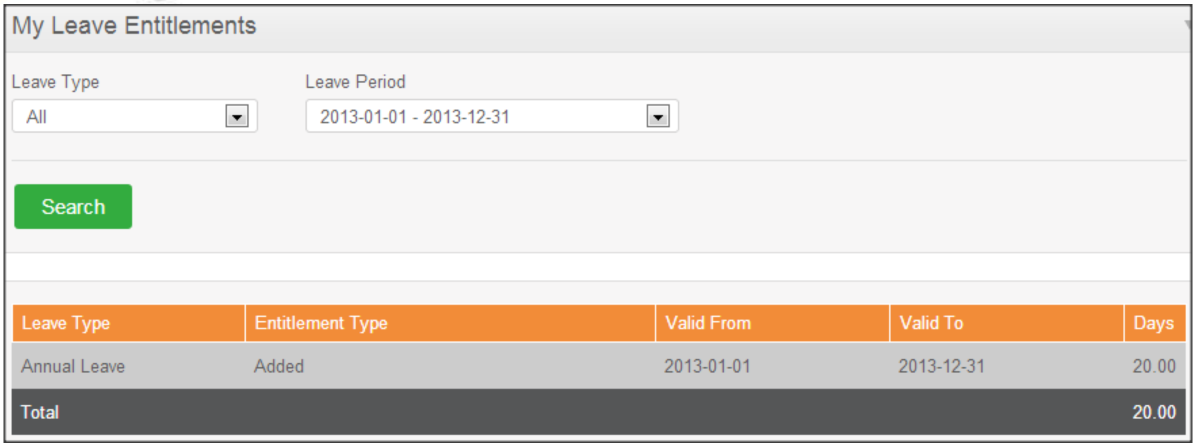


Figure 4.0: ESS-Supervisor- My Entitlements

To view a subordinates 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.

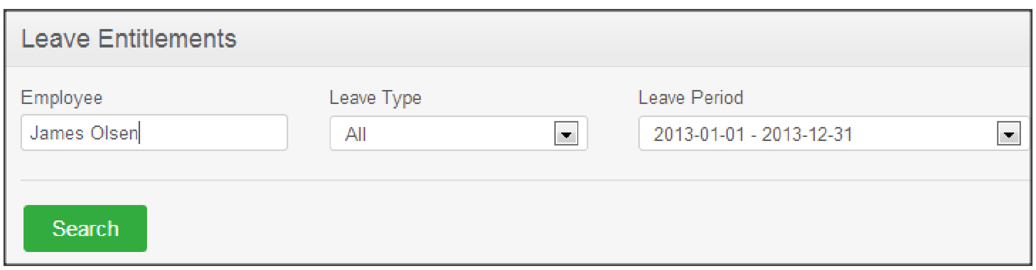


Figure 4.1: ESS-Supervisor - Subordinate Entitlement Search

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

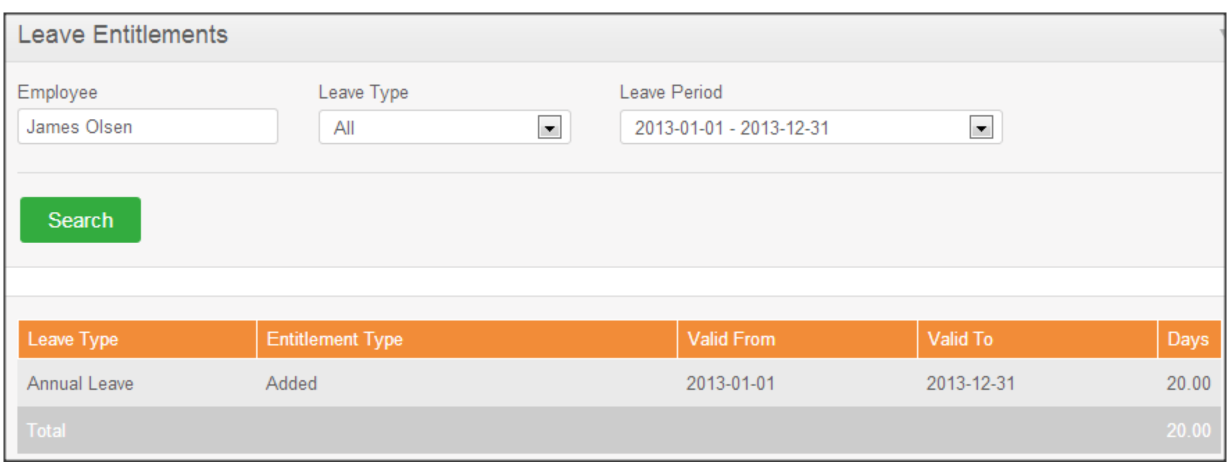


Figure 4.2: ESS-Supervisor View of Subordinate Entitlement

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".

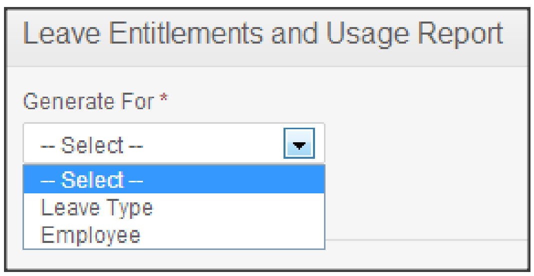


Figure 4.2.1: Leave List

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

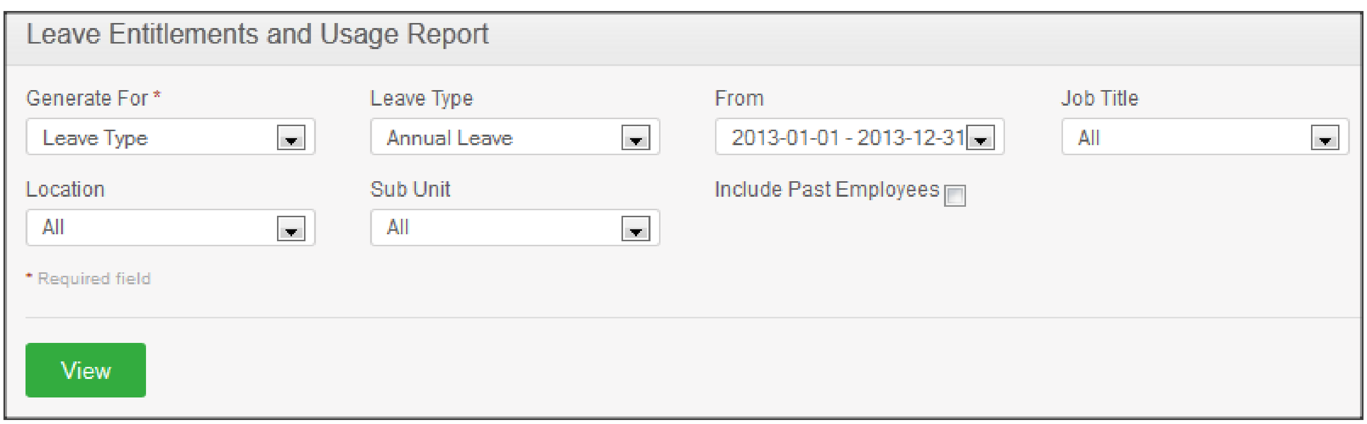


Figure 4.2.2: Leave Type Report Generation view

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	20.00	9.38	0.00	0.00	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" filed, 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	20.00	9.38	0.00	0.00	10.63
Sick Leave	0.00	0.00	0.00	0.00	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	20.00	0.00	0.00	0.00	20.00
Sick Leave	0.00	0.00	0.00	0.00	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.

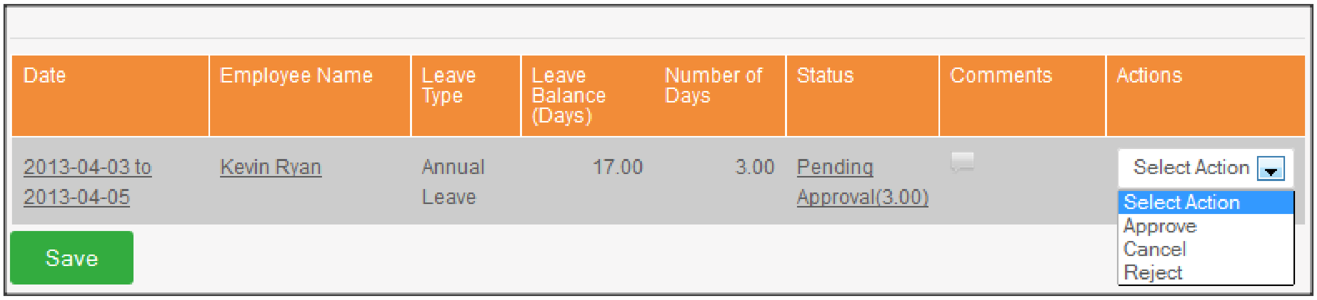


Figure 4.3: Leave List

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”.

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.

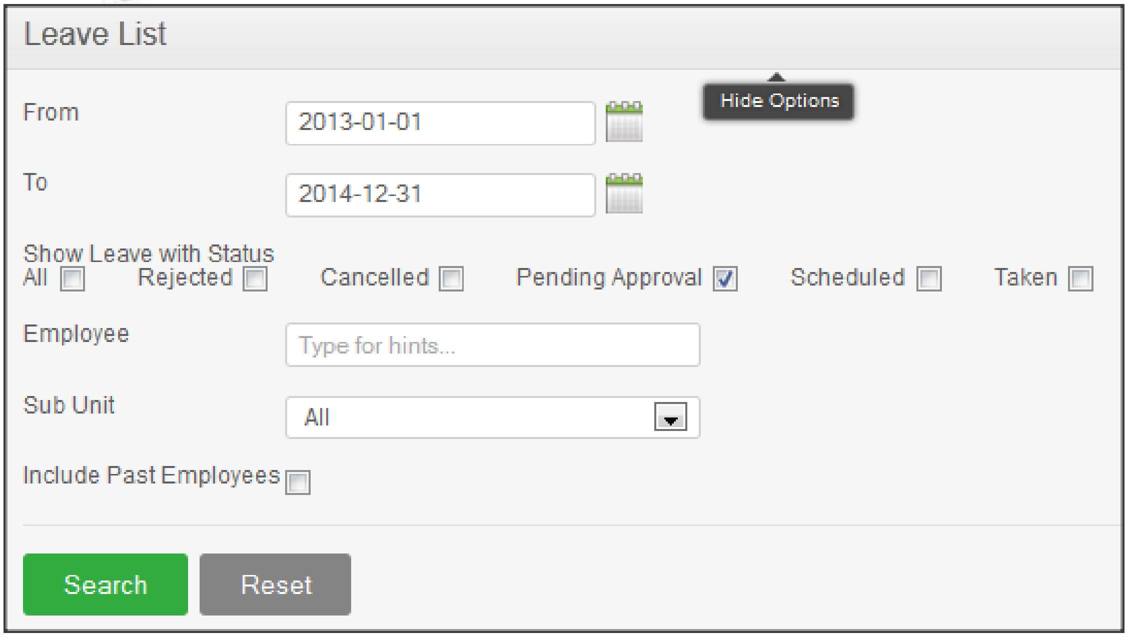


Figure 4.5: Leave List Search

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.

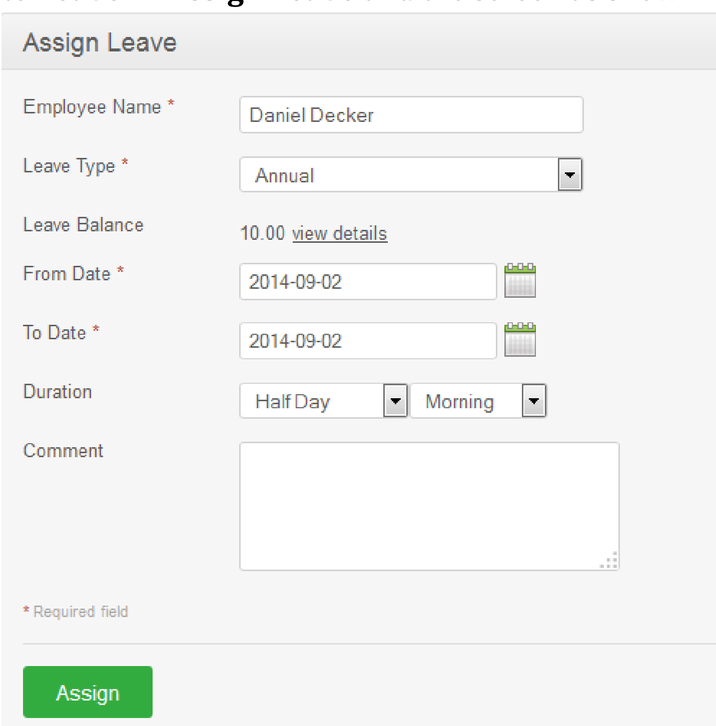


Figure 4.6: Assign Leave

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.

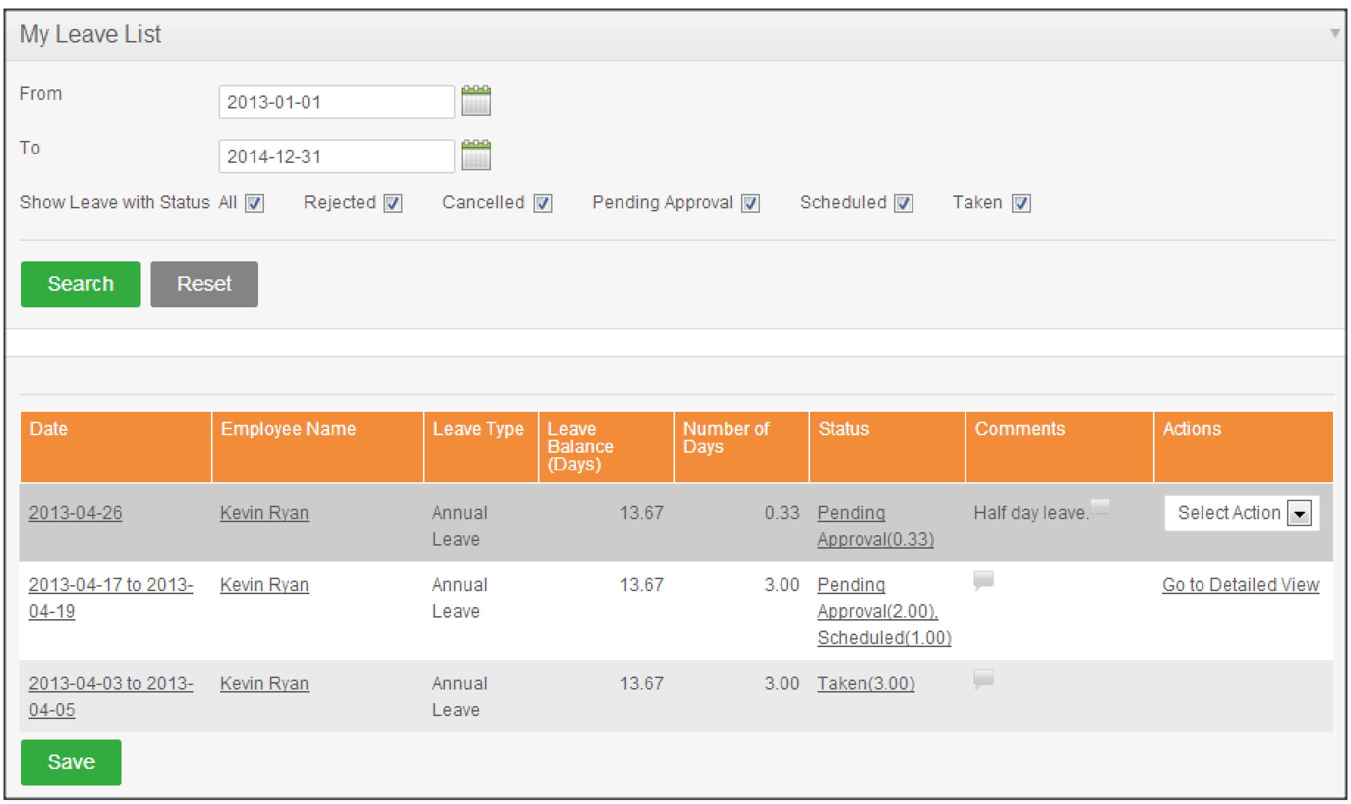


Figure 4.7: My Leave List

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.

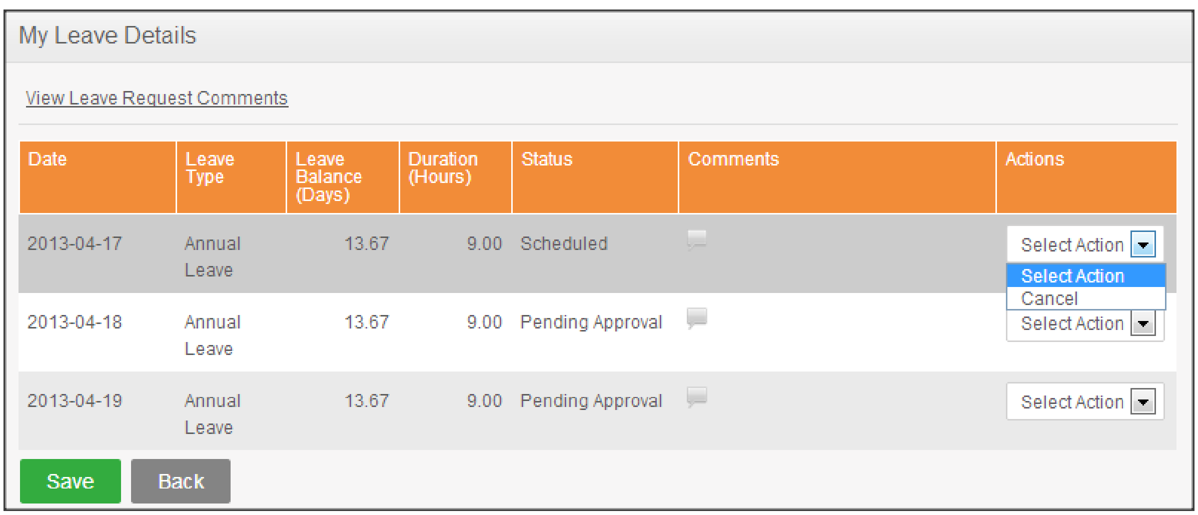


Figure 4.8: My Leave Details

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.

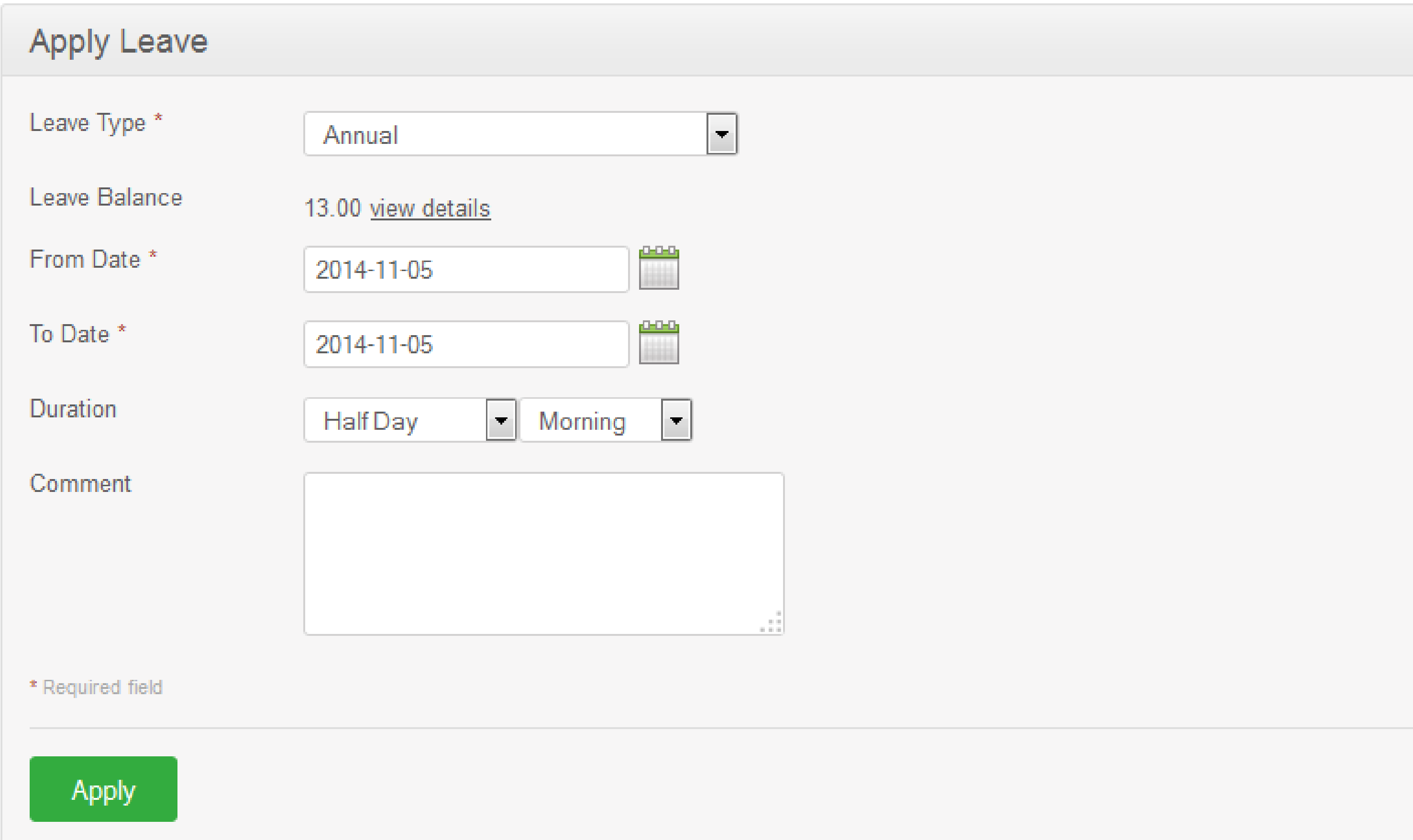


Figure 12.9: Apply Leave

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
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)		

Save

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.

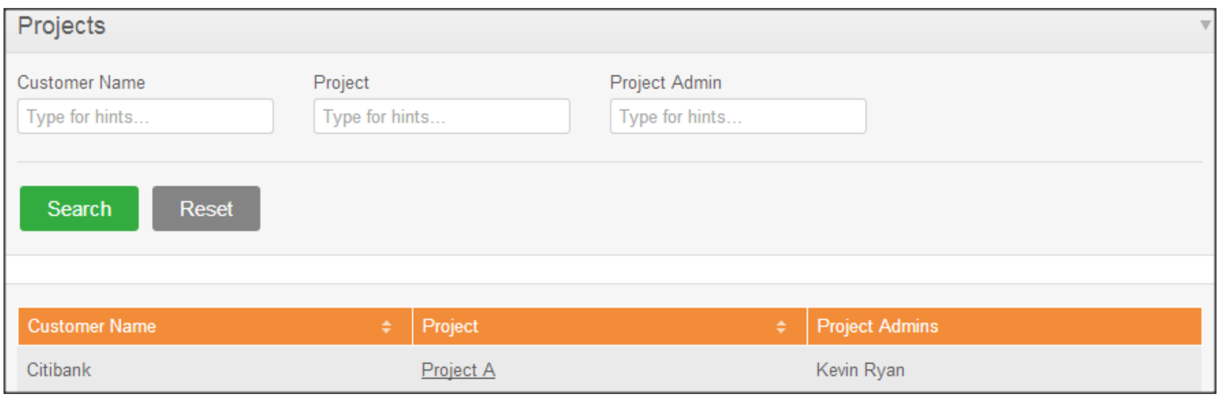


Figure 5.1: Projects

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.

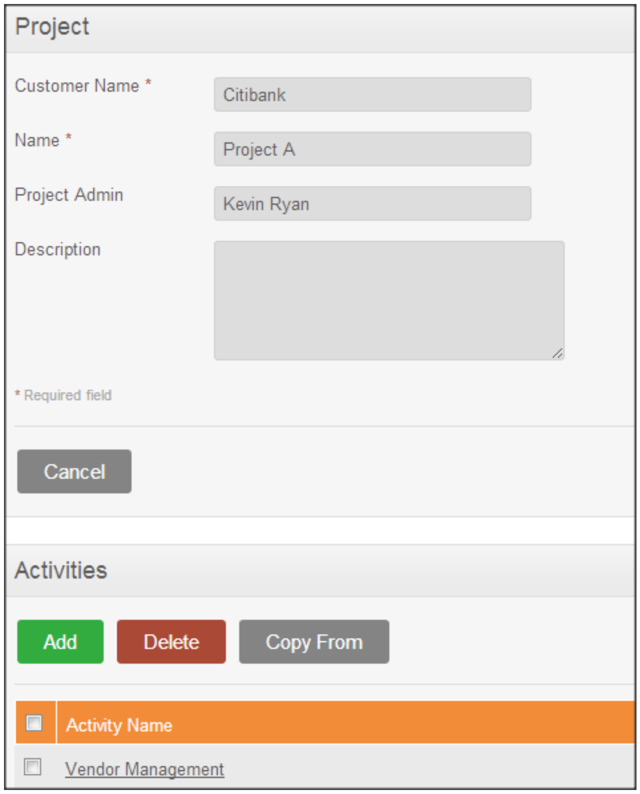


Figure 5.2: Project Details

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.

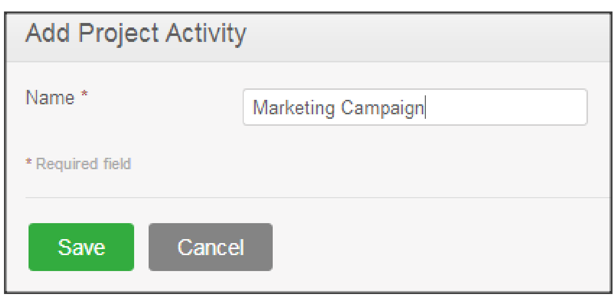


Figure 5.3: Add Project Activity

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

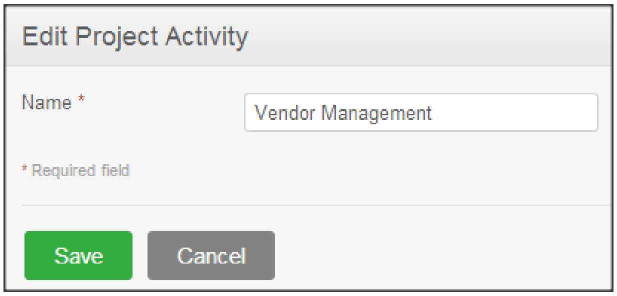


Figure 5.4: Edit Project Activity

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”.

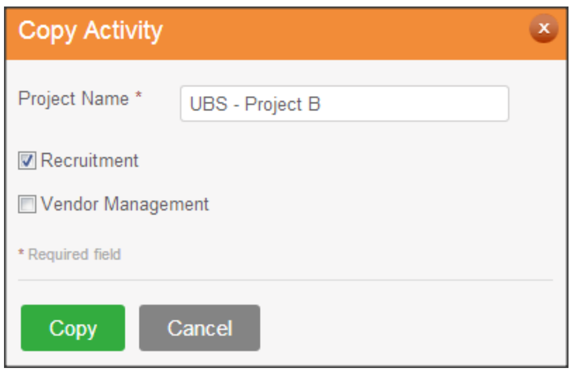


Figure 5.5: Copy Project Activity

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).

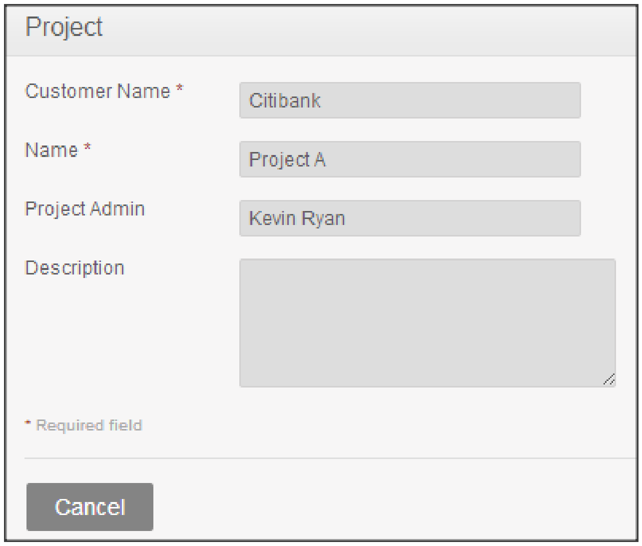


Figure 5.6: Project Information

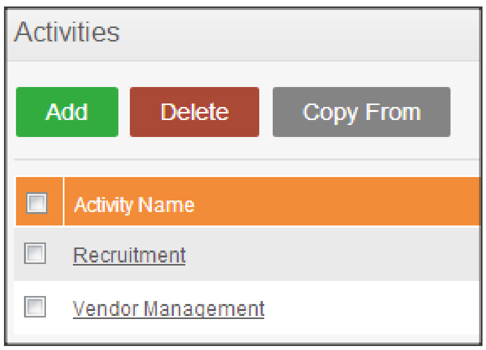


Figure 5.7: Add, Delete, Copy Activities

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.

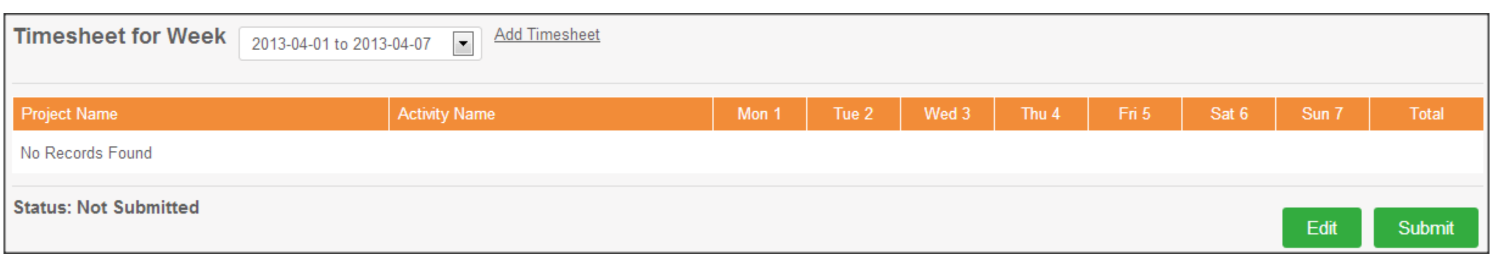


Figure 5.8: Enter Timesheet

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.

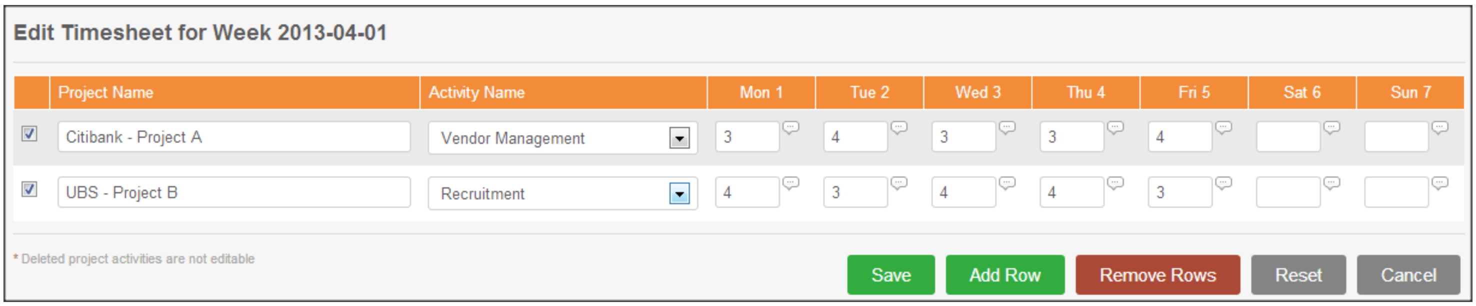


Figure 5.9: Edit Timesheet

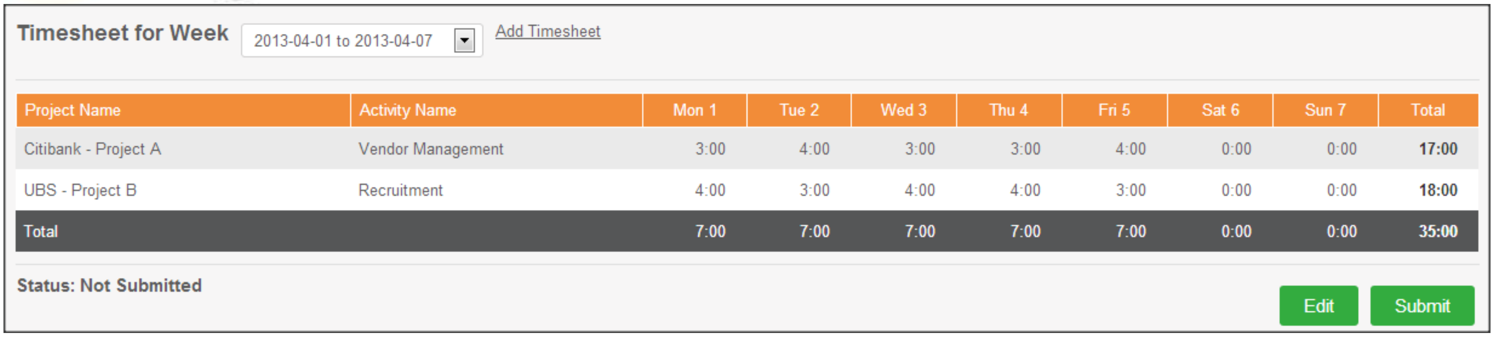
The following options are available when editing the timesheet:

- **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

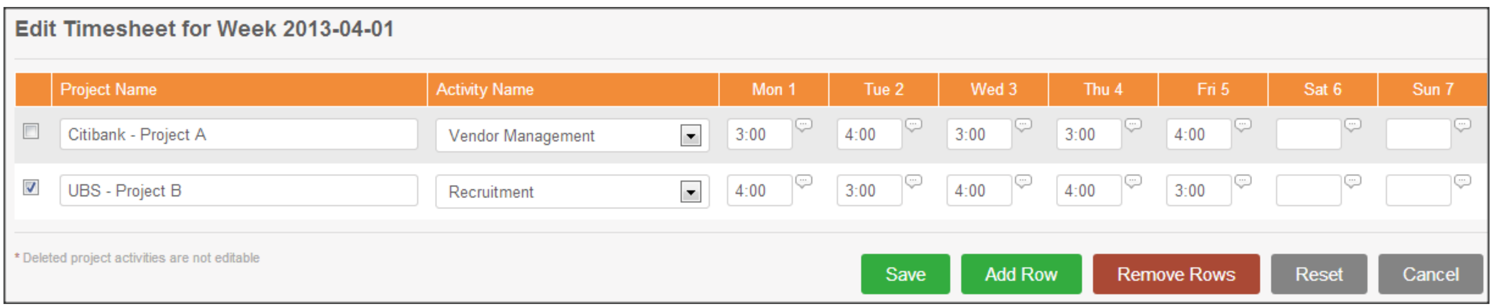
Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Total
Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00	0:00	0:00	17:00
UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00	0:00	0:00	18:00
Total		7:00	7:00	7:00	7:00	7:00	0:00	0:00	35:00

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

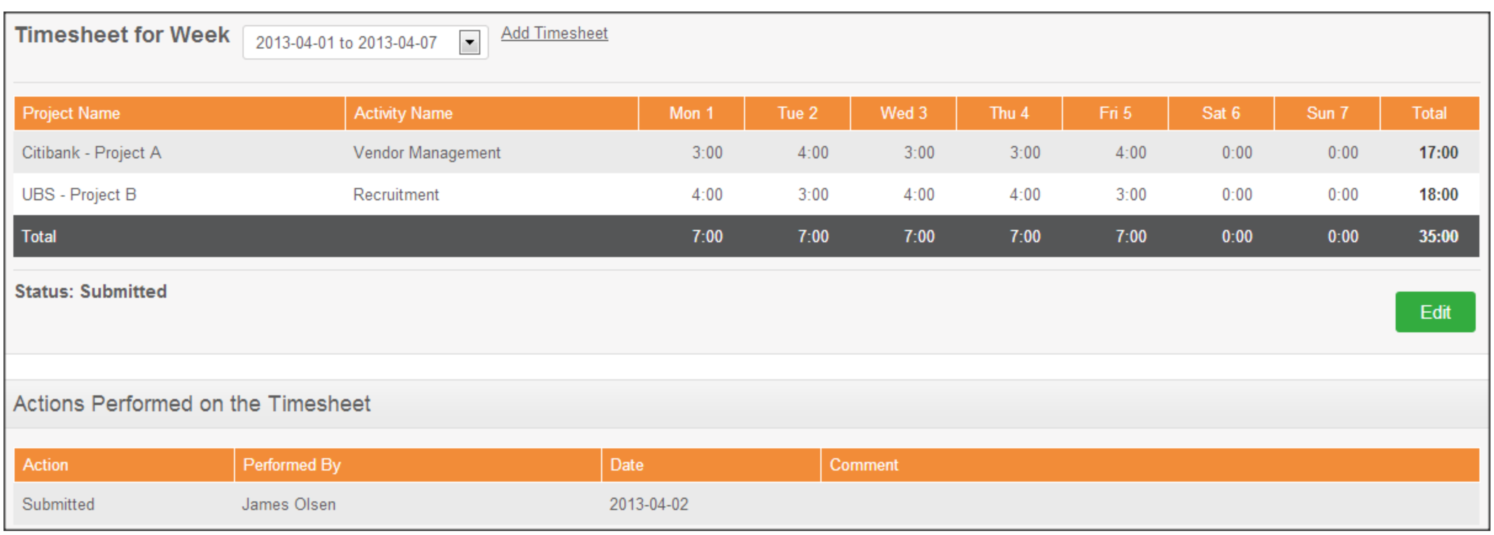
	Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7
☐	Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00		
☑	UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00		

* 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.

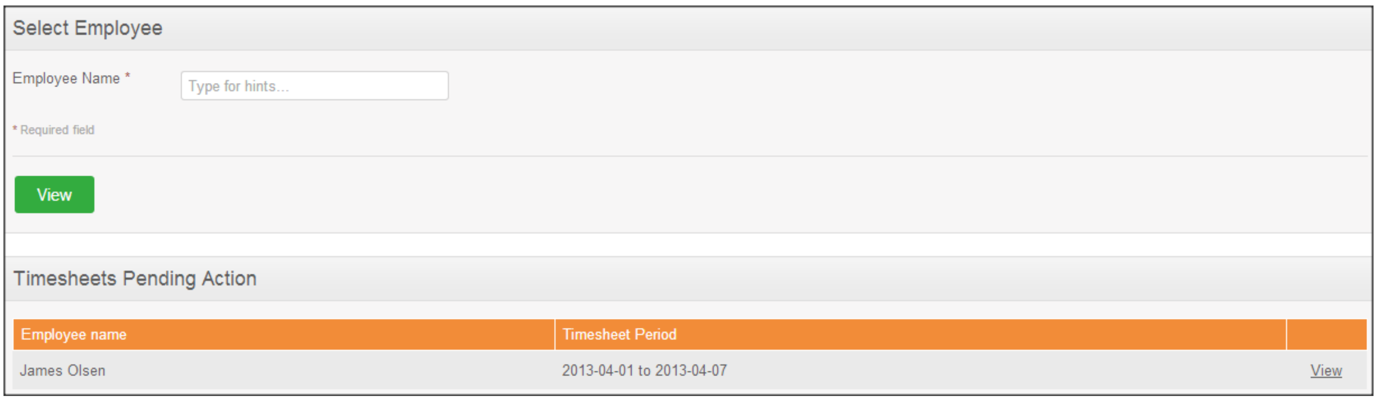
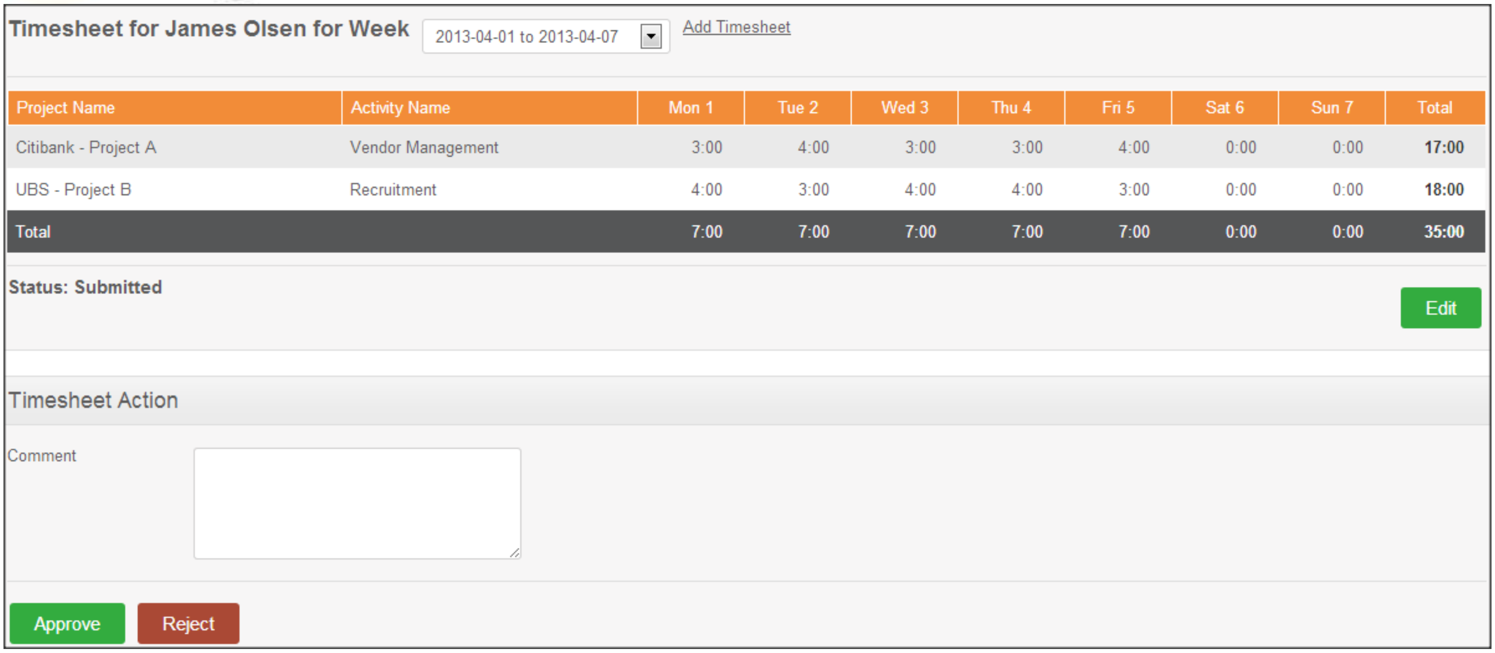


Figure 6.3: ESS Supervisor View Employee's Submitted Timesheet

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 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

Timesheet Action

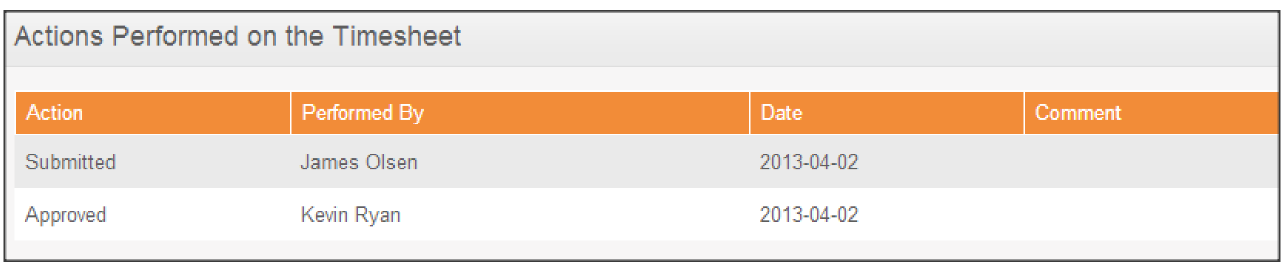
Comment

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.

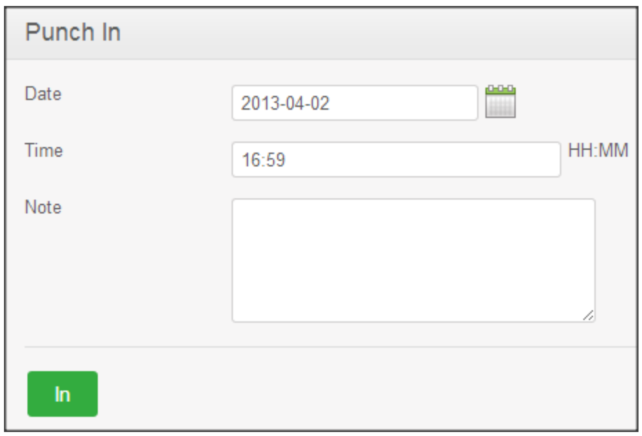


Figure 6.6: Punch In

*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".

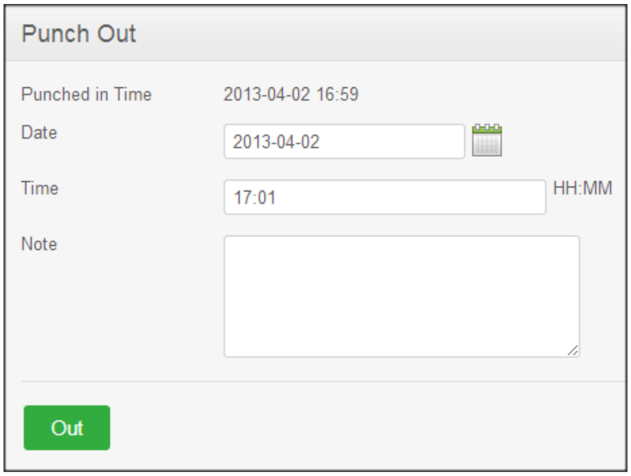


Figure 6.7: Punch Out

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.

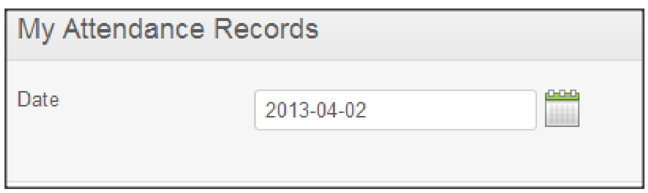


Figure 6.8: View My Records

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

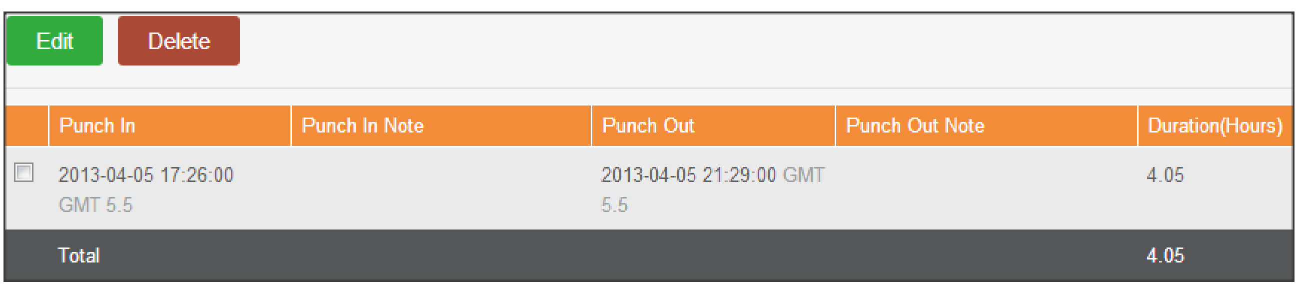


Figure 6.9: "My Records" in Detail

*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".

Employee Records

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

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

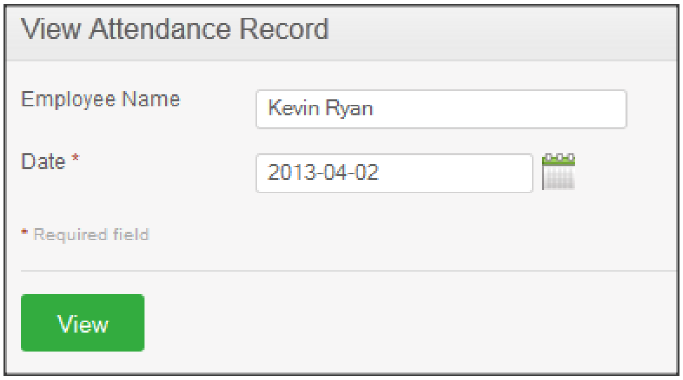


Figure 7.0: View Employee Records

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.

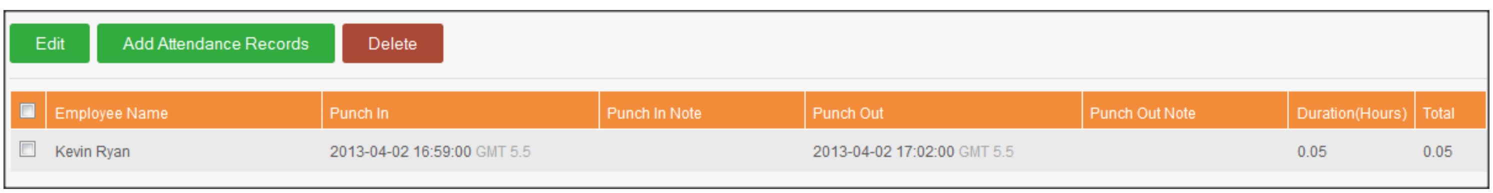


Figure 7.1: Employee Record in Detail

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.

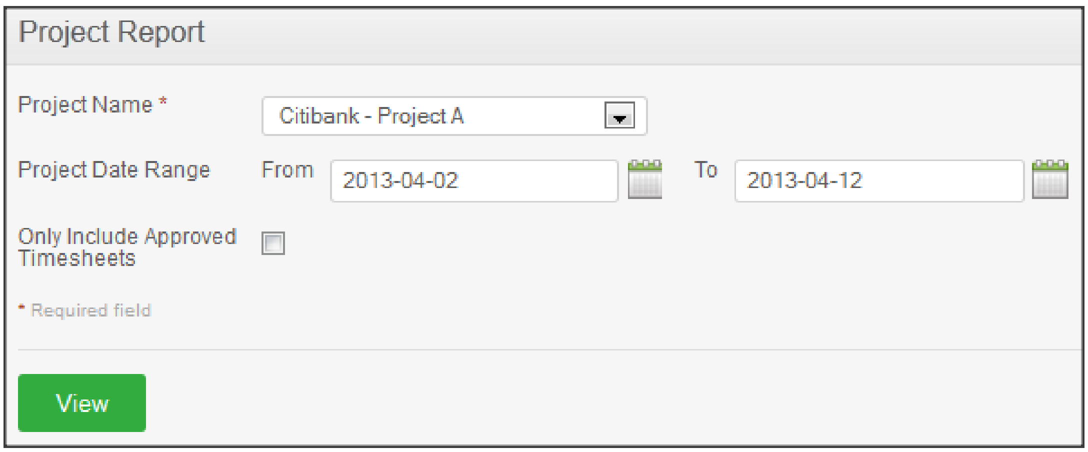


Figure 7.2: View Project Report

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.

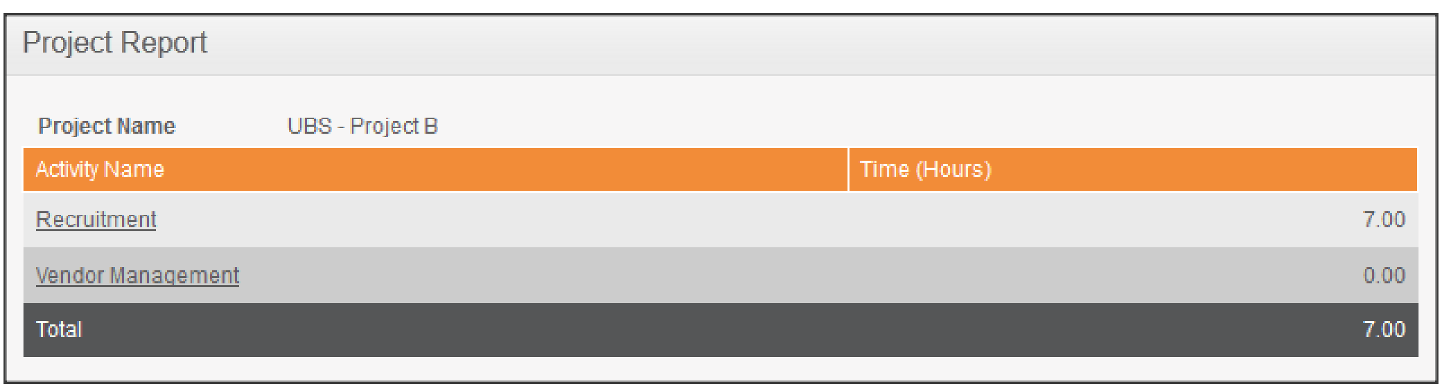


Figure 7.3: Project Report

Employee Report

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

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

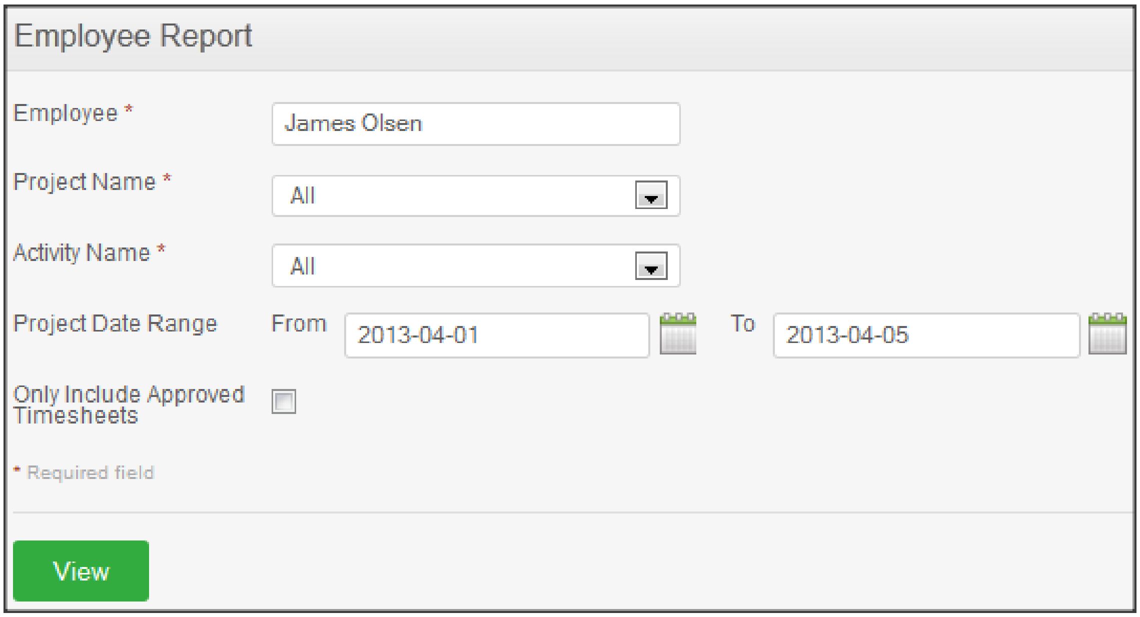
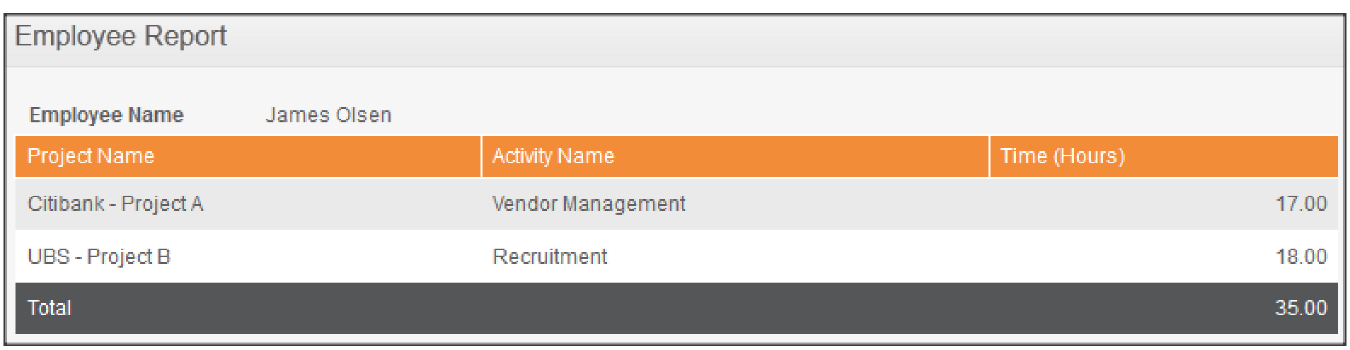


Figure 7.4: Run Employee Report

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

Attendance Summary

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

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

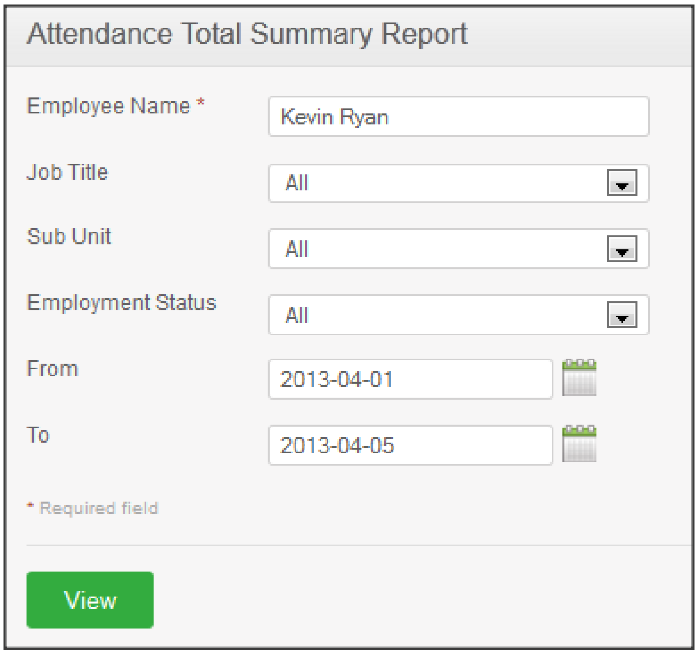


Figure 7.6: Run Attendance Summary Report

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.

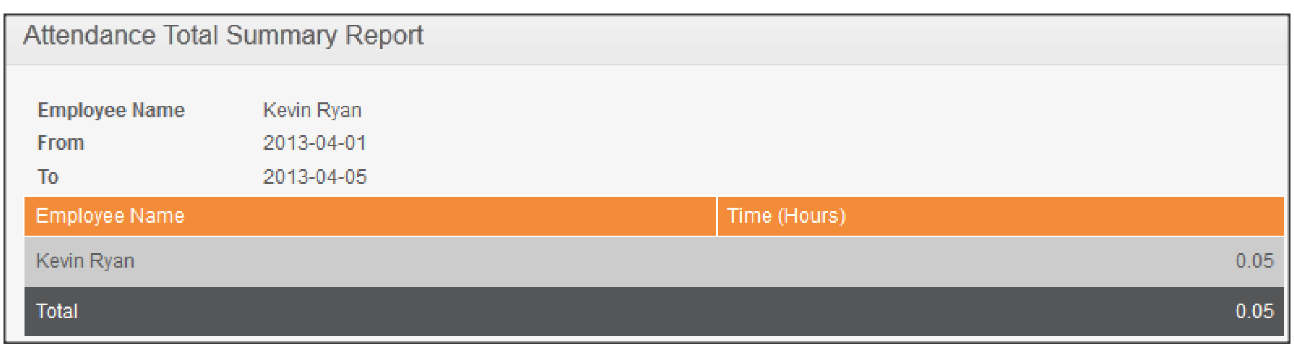


Figure 7.7: Attendance Summary Report

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
Ashley Abel	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
James Abrahamson	Tracker for James	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.

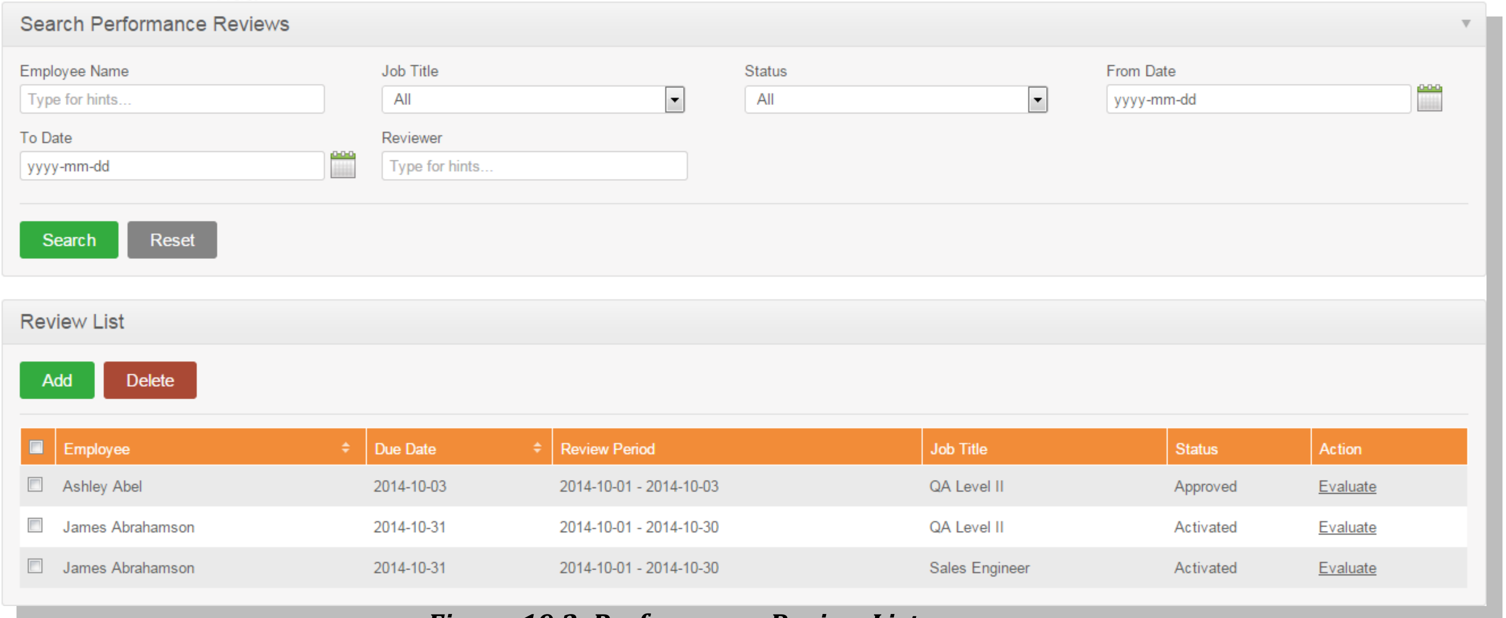


Figure 19.2: Performance Review List

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.

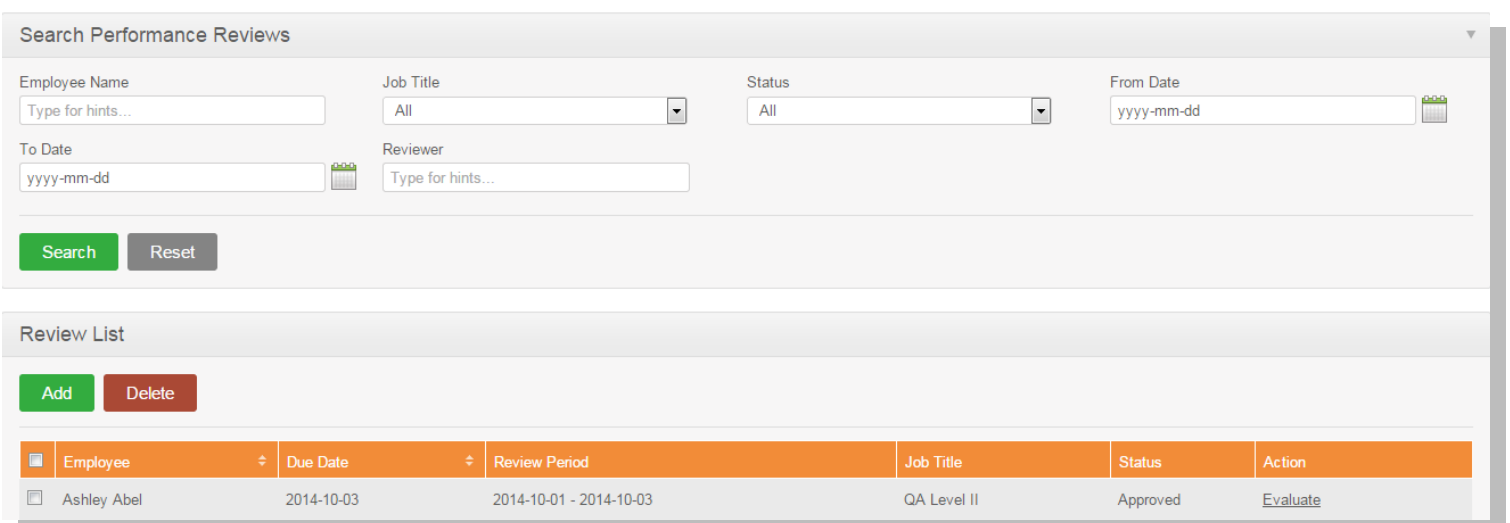


Figure 19.3: Search Performance Reviews

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.

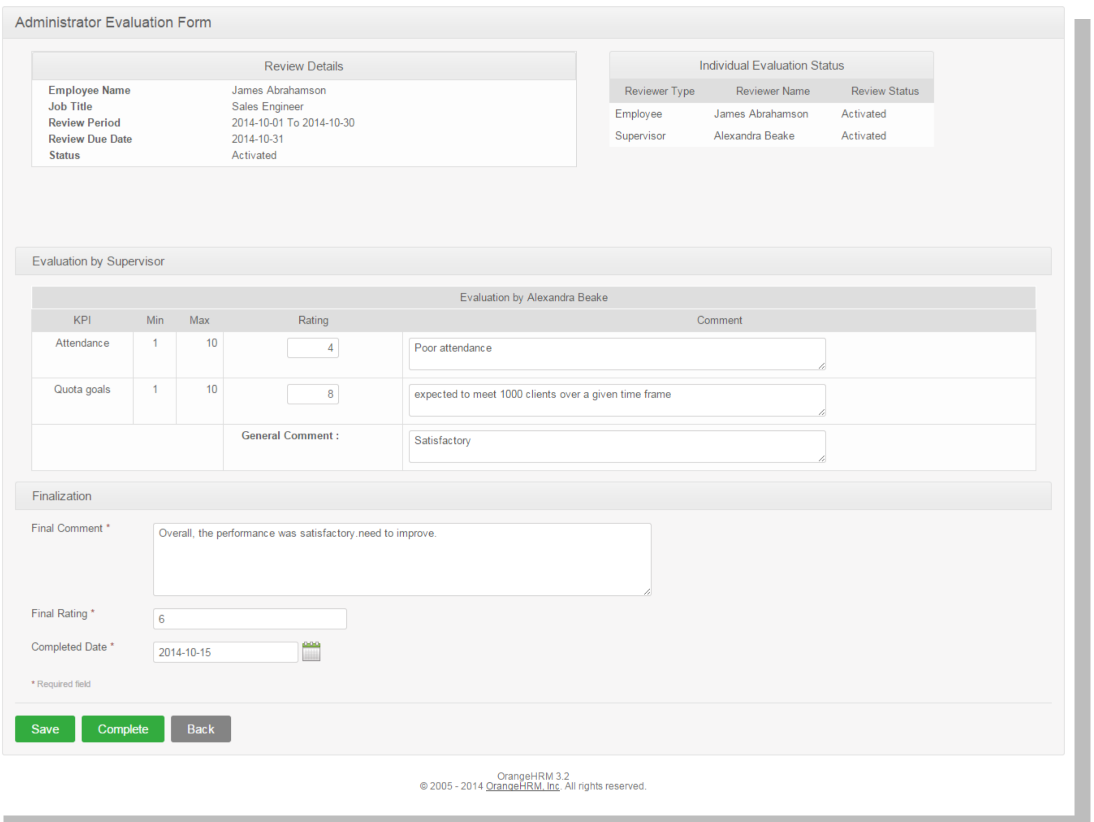


Figure 19.4: Performance Review of an employee

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.

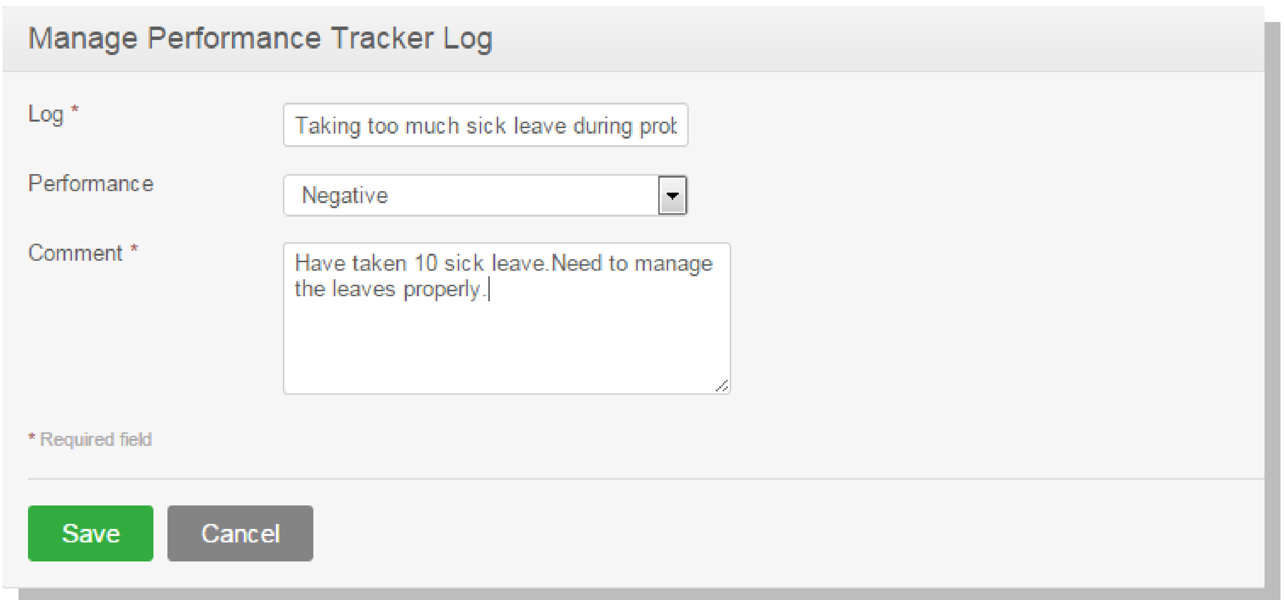


Figure 19.5: Manage Performance Tracker Log

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

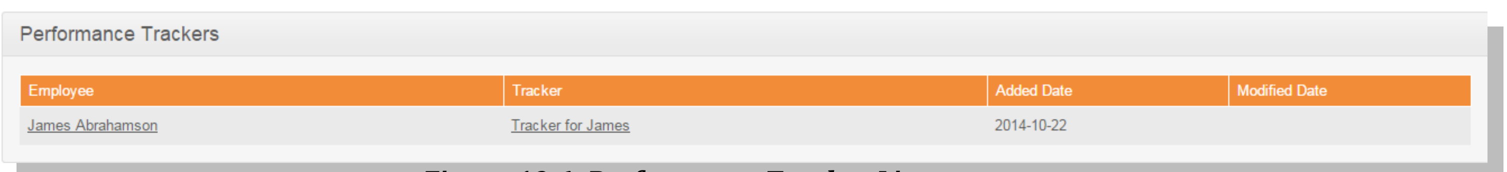


Figure 19.6: Performance Tracker List

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.

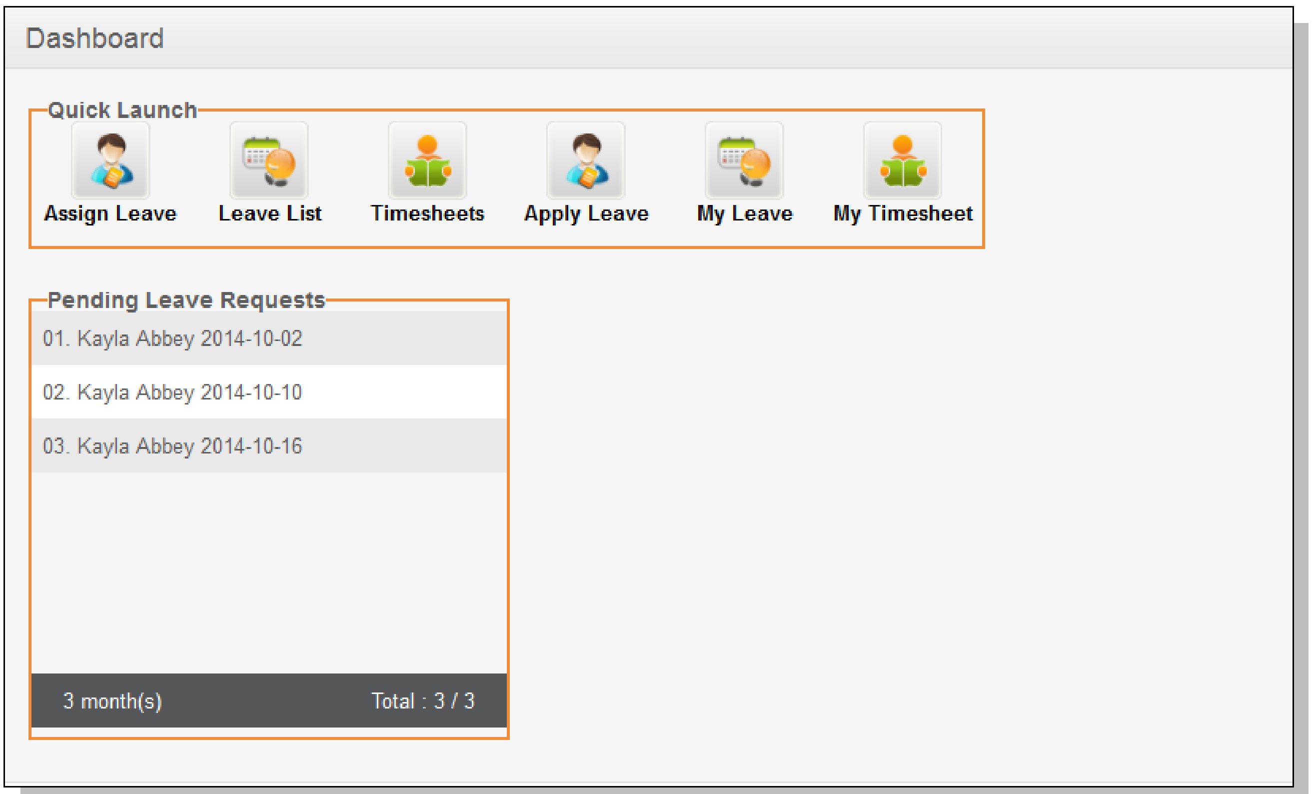


Figure 19.7: Dashboard

8.1 Quick Launch Panel

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

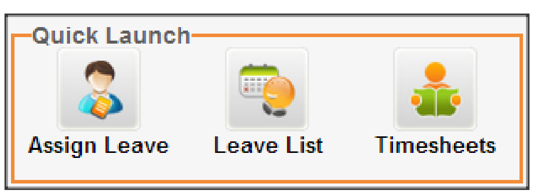


Figure 19.8: Quick Launch Panel

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.

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.

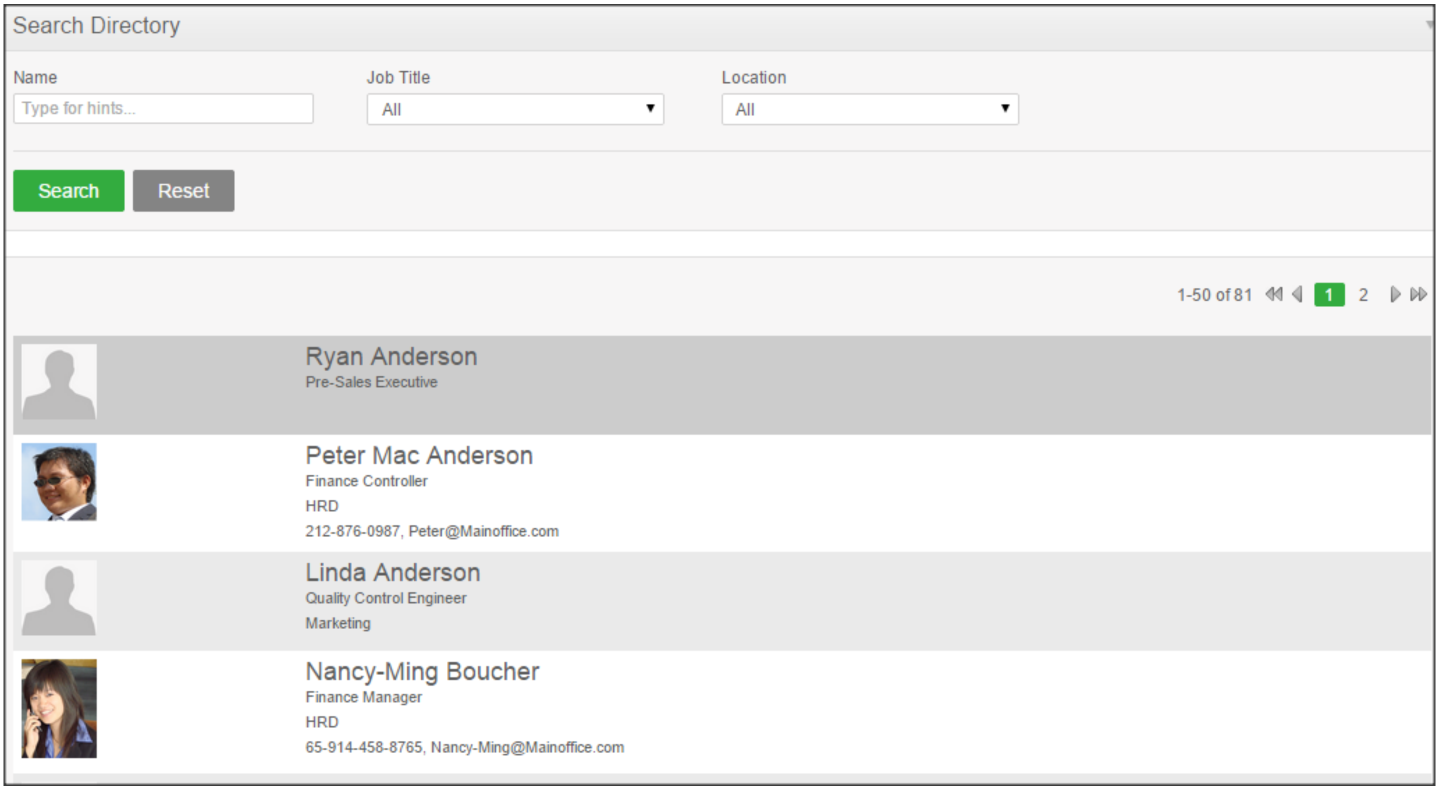


Figure 12.0: Corporate Directory

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)