



click2try[™]

click2try[™] Tutorial

OrangeHRM

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Contents

Introduction	5
Understanding OrangeHRM Modules	6
Entering your Company’s Information.....	6
Creating Users.....	7
Creating a Job Category	8
Working with Qualifications	10
Managing Project Info	10
Working with Skills	11
Adding Employee PIM Information.....	11
Editing Employee Information	13
Working with Leave.....	13
Working with Benefits	14
Working with Recruitment	14
Working with Reports.....	16
Resources.....	17

Introduction

OrangeHRM is a comprehensive solution for the efficient management and development of your Human Resources functions. OrangeHRM assists you in the complex and strategic process of managing this crucial enterprise function. Based on modular architecture, OrangeHRM enables a vast range of HR activities, with features that reflect the primary HR management activities. OrangeHRM is a perfect platform for reengineering your HR processes and achieving a new level of HR Management.

With OrangeHRM you can:

- Manage all aspects of Human Resource management.
- Easily define job categories, skills and requirements.
- Define and set pay categories and scales.
- Organize and keep track of employee personal information.
- Allow employees to update and view their own personal information.
- Manage your employee Leave (such as, leave entitlement, balance and history).
- Manage your employee benefits.
- Manage your employee recruitment.
- Create and distribute reports.

In this tutorial you'll learn about:

- Using specific modules (Admin, PIM, and ESS).
- Setting up OrangeHRM to manage employee information.
- Managing and organizing HR information.
- Setting up OrangeHRM to manage employee Leave.
- Setting up OrangeHRM to manage employee benefits.
- Using OrangeHRM to manage your recruitment tasks.

Once you've tried OrangeHRM, you'll quickly discover just how easy it is to manage Human Resources!

Understanding OrangeHRM Modules

OrangeHRM has split the tasks of managing Human Resources into functional categories or modules. The 8 different modules are Admin, PIM, Leave, Time, Benefits, Recruitment, Reports and Bug Tracker. This tutorial covers the first seven of these modules. Each module is accessible via the tabs at the top of the OrangeHRM screen.

To explore the available modules:

1. Click **Admin**.
2. Take a look at what's available for you to work with.
3. When finished, click on another module tab, if you'd like to explore further.
4. When finished exploring, click **Home**.

Although each module covers a different area of human resource management, many of the tasks you'll perform to configure and use the modules are very similar. By spending some time reviewing each module (in each tab) you should begin to see some basic patterns of how OrangeHRM is organized.

Entering your Company's Information

There are a number of tasks you would need to do first before you can begin using OrangeHRM to manage your Human Resources. The next several tasks you will need to perform will utilize the Admin Module.

To configure your company information

1. Select **Company Info**.
2. There are 4 options you'll need to set up:
 - **General**
 - **Company Structure**
 - **Locations**
 - **Company Property**
3. For this tutorial, click **General**.
4. Enter a company name, such as "xCeed Tools."
5. Click **Save**.
6. If you want, select the other options and enter company information for *xCeed Tools*.
7. Click **Save**.

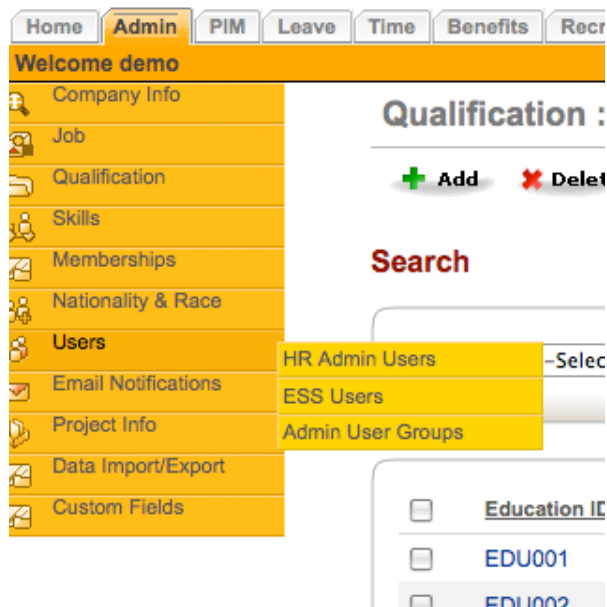
That's all you need to do, at a minimum, to set up a company. Of course, when configuring your own company's system, you'll want to add as much information as possible.

Creating Users

One of the first things you'll need to do is create users and user groups. When creating users or groups, you also assign specific rights and permissions to each, which limits (grants) access to specific tasks and information within OrangeHRM.

To create users and user groups:

1. Select **Admin > Users**.



2. You'll see 3 categories you'll need to configure.
 - **HR Admin Users**—These are your HR employees.
 - **ESS Users**—These are your company's employees who can use OrangeHRM to view their vacation time, benefits, and other data.
 - **Admin User Groups**—These are user groups you can configure for projects in HR, or other purposes.
3. Here is where you would create users, assign users' rights within OrangeHRM, or create groups that possess specific rights to save, edit, delete, and so on.
4. Choose each, choose edit or add and enter the relevant information.
5. Click **Save**.

Creating a Job Category

OrangeHRM allows you to create job categories and classifications.

To create a new job:

The screenshot shows the OrangeHRM interface. On the left is a navigation menu with the following items: Company Info, Job, Qualification, Skills, Memberships, Nationality & Race, Users, Email Notifications, Project Info, Data Import/Export, and Custom Fields. The 'Job' item is selected. The main content area is titled 'Company Info' and contains a form with the following fields: Tax ID (123456), Phone (+1-00), Country (United), Address1 (15 Inte), City (Los An), and ZIP Code (90000). The 'Job' sub-menu is expanded, showing the following options: Job Titles, Job Specifications, Pay Grades, Employment Status (Global), and EEO Job Categories.

1. Select **Admin > Job**.
2. You can configure 5 different options for each job.
 - **Job Titles**—Enter the job title, for instance, “Sales Representative.”
 - **Job Specifications**—Enter certain types of status, such as Exempt or Non-Exempt, Salaried, Commission, Hourly, or other status.
 - **Pay Grades**—Define currency and minimum and maximum pay rates.
 - **Employment Status**—Define employment status such as full or part-time, terminated, and so on.
 - **EEO Job Categories**—Import EEO job categories.
3. Select **Job > Job Titles**.
4. Click **Add**.
5. For **Job Title**, enter “Sales Representative.”
6. For **Job Description**, enter “Research, prospect, write proposals, present to prospects and customers, and complete sales process.”
7. Click **Save**.
8. Select **Job > Job Specifications**.
9. Click **Add**.

10. Enter a name in the **Name** field and then click **Save**. This choice will now appear in the **Job Specification** drop-down menu.

The screenshot shows the 'Job : Job Title' form in the OrangeHRM interface. The form includes the following fields and options:

- Job Title ID: JOB012
- Job Title Name: Sales Representative
- Job Description: Research, prospect, write proposals, present to prospects and
- Job Title Comments: (Empty text area)
- Job Specification: Exempt
- Pay Grade: Sales Draw (with 'Add Pay Grade' and 'Edit Pay Grade' buttons)
- Employment Status: Full Time Permanent (with '< Add', 'Remove >', and 'Add Employment Status' buttons)

11. Now select **Job > Pay Grades** and click **Add**.
12. Enter a name, and then click **Save**. This displays the **Pay Grade** dialog.

The screenshot shows the 'Job : Pay Grade' dialog in the OrangeHRM interface. The dialog includes the following fields and options:

- Code: SAL009
- Name: Sales Draw
- Currency Assigned: Euro
- Minimum Salary: 18000
- Maximum Salary: 28000
- Step Increase: 1000

At the bottom, there is a 'Delete' section with a table:

Currency	Minimum Salary	Maximum Salary	Step Increase
<input type="checkbox"/> United States Dollar	30000	40000	1000

Fields marked with an asterisk * are required.

13. Select a currency from the **Currency** drop-down menu, and then fill in the other fields if you like.
14. Click **Save**.

Note that you can define multiple currencies for the same pay grade, in case you operate internationally.

That's it. You've defined a new job, along with job specifications and a pay grade you can use for other jobs.

Working with Qualifications

Often, training and education are sub-functions of a company's HR department. OrangeHRM allows you to work with Qualification courses or categories, which are important when dealing with technical or licensed employees. In many industries, employees are encouraged to take continuing education, while in others, they are required to maintain qualifications set by government agencies or professional organizations.

To create a Qualification:

1. Select **Admin > Qualification**.
2. You'll see 2 categories you'll need to configure.
 - **Education**—Define institutions and courses.
 - **Licenses**—Define professional licenses.
3. Select **Admin > Qualification > Education**.
4. Enter an institution name and a course title.
5. Click **Save**.
6. Select **Admin > Qualification > Licenses**.
7. Enter the name of the license you want to define. OrangeHRM automatically assigns a unique identification number.
8. Click **Save**.

Managing Project Info

Human Resource departments often manage and oversee their own and other departmental projects, particularly those that will be used cross-departmentally. Project management involves keeping track of ongoing projects, linking up projects with specific customers (internal and external), and tracking activities, time, and human resources devoted to each individual project. OrangeHRM is a great tool for managing your company's projects.

To manage your company's projects:

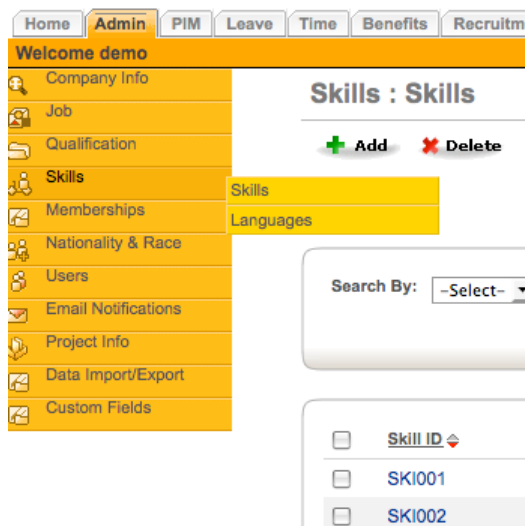
1. Select **Projects > Project Info**.
2. You'll see 3 options you'll need to configure.
 - **Customers**—Define internal or external customers.
 - **Projects**—Define the actual project details.
 - **Projects Activities**—Define activities that comprise the project.
3. Choose each, choose edit or add/delete and enter the relevant information for your projects.
4. Click **Save**.

Working with Skills

Identifying and keeping track of the necessary skills your company's employees need is an important function of any Human Resources department. OrangeHRM allows you to do just that in a manner that is easy and straightforward.

To manage employee skills

1. Click **Admin**.
2. Click **Skills**. On this page you can configure the following two options:
 - **Skills**
 - **Languages**



3. Choose each, edit or add/delete and enter the relevant information for your different skill sets.
4. Click **Save**.

Setting up skill sets is a great way to define and develop job descriptions, and to identify the untapped skills in your organization.

Adding Employee PIM Information

Use the PIM module to track and manage your organization's personnel information. Here you can enter all of the relevant information about each of your company's employees, such as employee ID, job title, employment status, supervisor, salary, immigration status, pay details, and other important information.

To add employee PIM information:

1. Click **PIM**. The employee membership list appears.

- To add a new employee click **Add**. The **Add-an-employee** screen appears.

Employee Information

Add **Delete**

Search

Search By: Search For: **Search** **Clear**

<u>Employee Id</u> ⇅	<u>Employee Name</u> ⇅	<u>Job Title</u> ⇅	<u>Employment status</u> ⇅
<input type="checkbox"/> 024	George Walker	-	-


- Enter the employee's name.
- When finished, click **Save**. A second screen will appear.
- Now enter all of the employee information appropriate for your company using the options in the different categories (for example, social security number, skills, and so on).

Employee Information

Code:

* Last Name: * First Name:

Middle Name: Nick Name:



Back **Edit** **Reset**

Personal
 Contact
 Emergency Contact(s)
 Dependents
 Immigration
 Job
 Salary
 Tax Exemptions
 Direct Deposit
 Custom
 Report-to
 Work experience
 Education
 Skills
 Languages
 License
 Membership Attachments

SSN No: Nationality:

SIN No: Date of Birth:

Other ID: Marital Status:

Smoker: Gender: Male Female

Driver's License Number: License Expiry Date:

Military Service: Ethnic Race:

Fields marked with an asterisk * are required.

- When finished, click the **PIM** module tab.

Editing Employee Information

While you'll only add an employee's information once, you'll likely need to edit the data more often. Use the PIM module also to edit employee information. Some of the most frequently changed data includes changing surnames due to marriage, salary and pay grade due to promotion, or other benefit information due to addition of a dependent.

To edit employee PIM data:

1. Click **PIM**. Your company's employee list screen appears.

The screenshot shows the 'Employee Information' screen. At the top, there are '+ Add' and 'x Delete' buttons. Below is a search section with a 'Search By' dropdown menu (currently set to '-Select-'), a 'Search For' text input field, and 'Search' and 'Clear' buttons. Below the search section is a table with the following columns: Employee Id, Employee Name, Job Title, and Employment status. The table contains one row with the following data: Employee Id: 024, Employee Name: George Walker, Job Title: -, and Employment status: -.

2. To edit an employee's information, click the employee's name. The employee information screen appears.
3. Enter new information or edit existing information for the given employee.
4. When finished, click the **PIM** module tab.

Working with Leave

Employee leave can be anything from regular personal time off (PTO) to vacation days, to comp time, maternity leave, military leave, or other types of paid and unpaid leave. OrangeHRM gives you the control to define all sorts of leave, actual days off, to assign leave dates, and to define other criteria relating to your employee leave program.

To manage employee leave:

1. Click **Leave**. On this page, you can manage the following five options:
 - **Leave Summary**
 - **Define Days Off (Holidays and Days off)**
 - **Define Leave Types**

- **Assign Leave**
 - **Leave List**
2. Choose one of the options.
 3. Enter the appropriate information for the option you chose.
 4. Click **Save**.
 5. When you're finished, enter more options or click **Home**.

Working with Benefits

OrangeHRM gives you a **Benefits** module, in which you can manage your employee and dependent benefits program. Here you can configure and manage your **Health Savings Plan** and your **Payroll Schedule**.

To manage employee benefits:

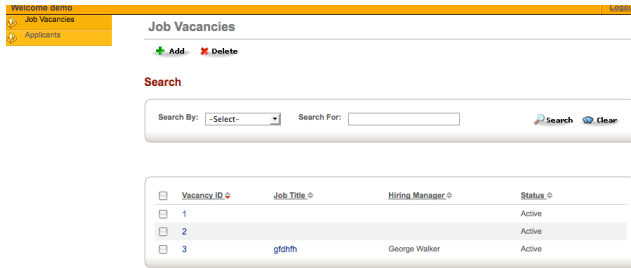
1. Click **Benefits**. You can manage the two following options:
 - **Health Savings Plan**
 - **Payroll Schedule**
2. Click **Health Savings Plan**.
3. Define your HSP, and then manage the details as employees register and use the program.
4. When finished, click **Payroll Schedule**. On this page, you can:
 - Add new information or edit existing information.
 - Define a pay period.
5. When finished, click **Home**.

Working with Recruitment

Recruitment is module you will use to manage your company's recruitment needs. Here you can design, post and manage job vacancies as well as manage your applicants' pools.

To manage recruitment:

1. Click **Recruitment**. On this page you can manage the following two options:
 - **Job Vacancies**
 - **Applicants**
2. To post a new job or manage an existing job, click **Job Vacancies**.



Job Vacancies

+ Add - Delete

Search

Search By: -Select- Search For: Search Clear

Vacancy ID	Job Title	Hiring Manager	Status
1			Active
2			Active
3	gfdthf	George Walker	Active

- To add a new applicant or manage an existing applicant, click **Applicants**.
- When you're finished, select another module (for example, Admin, PIM, Time) or click **Home**.

Working with Reports

Use the **Reports** module to create reports from any of your HR information. With this module you can define reports and then view (print) your reports.

To create a report:

1. Click **Reports**. Here you will find 2 options you can edit/or manage. The options are:
 - **View Reports**
 - **Define Reports**
2. To define a report, click **Define Reports**.
3. Click **Add**.
4. Enter a name for your report.
5. Define your report details by selecting the elements you want included in the report. In some cases, you will need to select detailed options from drop-down lists.

The screenshot shows the OrangeHRM web interface. At the top, there is a navigation bar with 'Terminal' and 'OrangeHRM' tabs, and a clock showing '01 : 59 : 01'. Below this is the OrangeHRM logo and a navigation menu with 'Home', 'Admin', 'PIM', 'Leave', 'Time', 'Reports', and 'Bug Tracker'. The 'Reports' menu is active, showing 'View Reports' and 'Define Reports' options. The main content area is titled 'Define Employee Reports : New' and contains a 'Report Name' field with the value 'Employee Pay Grade'. Below this is a 'Selection Criteria' section with a list of checkboxes and dropdown menus:

Criteria	Value
<input checked="" type="checkbox"/> Employee	All Employees
<input type="checkbox"/> Age Group	--Select Comparison--
<input checked="" type="checkbox"/> Pay Grade	--Select Salary Grade--
<input type="checkbox"/> Education	--Select Education Type--
<input type="checkbox"/> Employment Status	--Select Employment Typ--
<input type="checkbox"/> Service Period	--Select Comparison--
<input type="checkbox"/> Job Title	--Select Job Title--
<input type="checkbox"/> Language	--Select Language--

At the bottom of the page, there is a footer with the text: 'OrangeHRM ver 2.2_01 © OrangeHRM Inc. 2005 - 2007 All rights reserved. Copyright 2008 Presage Technologies, LLC. All Rights Reserved.'

6. When finished defining your report, click **Save**.
7. To view (or print) an existing report, click **View Reports**.
8. Select the report you would like to view or print.
9. When you're finished, select another module or click **Home**.

As you've seen, working with OrangeHRM is really very easy. You now have enough information (and practice) to continue evaluating OrangeHRM on your own.

Resources

For more information about OrangeHRM, check out website, and visit the following resources:

OrangeHRM's Features <http://www.orangehrm.com/product-features.shtml> —For a complete listing of OrangeHRM's Features.

OrangeHRM Forums <http://www.orangehrm.com/forum/> —OrangeHRM Forums, where you can work with other OrangeHRM users to solve problems and develop helpful relationships.

Customizing OrangeHRM <http://www.orangehrm.com/customizations.shtml> —Contains pages of content about customizing OrangeHRM to suit your business requirements.

OrangeHRM Module Roadmap <http://www.orangehrm.com/roadmap.shtml> —Complete roadmap for each OrangeHRM module.