click2try™ Tutorial

OrangeHRM

Contents

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**.

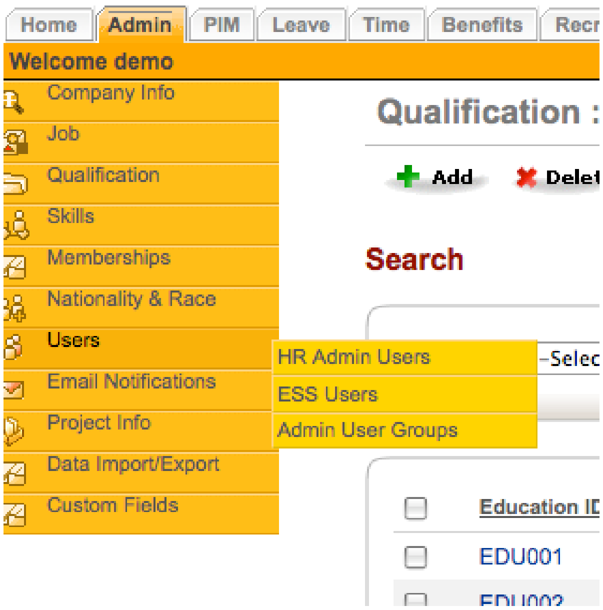
That's all you need to do, at a minimum, to set up a company. Of course, when configuring your own company's system, you'll want to add as much information as possible.

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**.

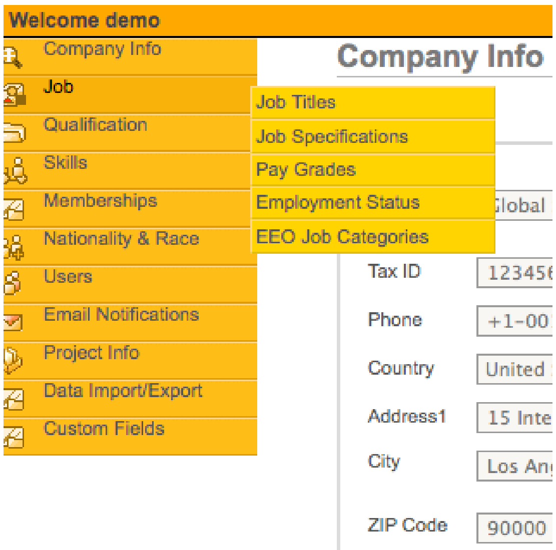


2. You'll see 3 categories you'll need to configure.
    - **HR Admin Users**—These are your HR employees.
    - **ESS Users**—These are your company's employees who can use OrangeHRM to view their vacation time, benefits, and other data.
    - **Admin User Groups**—These are user groups you can configure 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

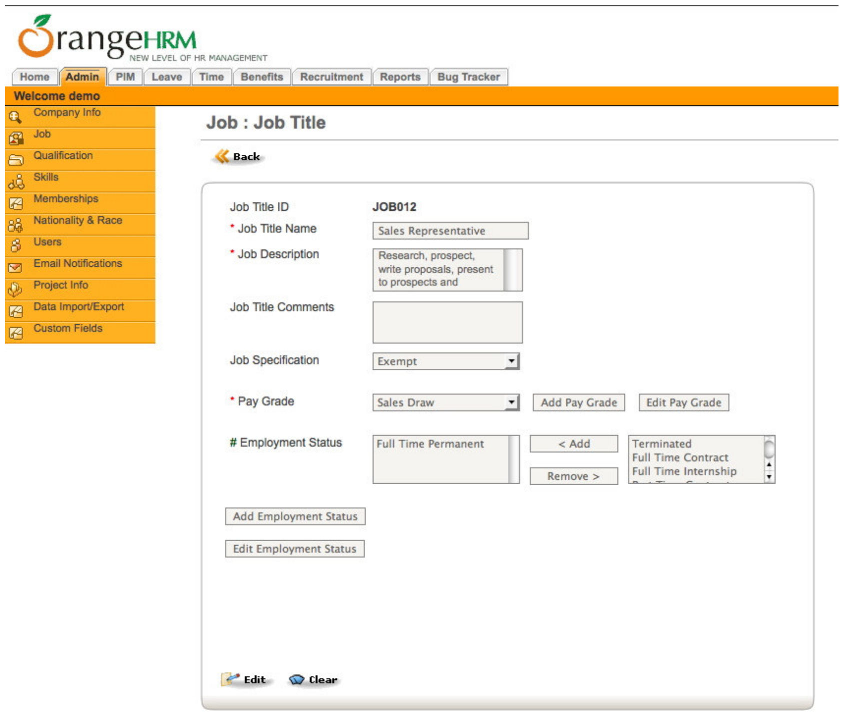
OrangeHRM allows you to create job categories and classifications.

To create a new job:

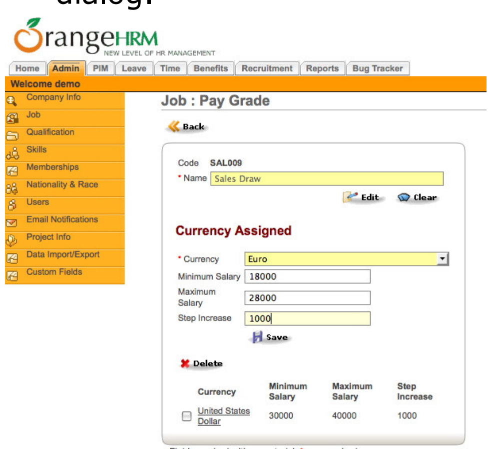


1. Select **Admin > Job**.
2. You can configure 5 different options for each job.
   - **Job Titles**—Enter the job title, for instance, "Sales Representative."
   - **Job Specifications**—Enter certain types of status, such as Exempt or Non-Exempt, Salaried, Commission, Hourly, or other status.
   - **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.



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



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:

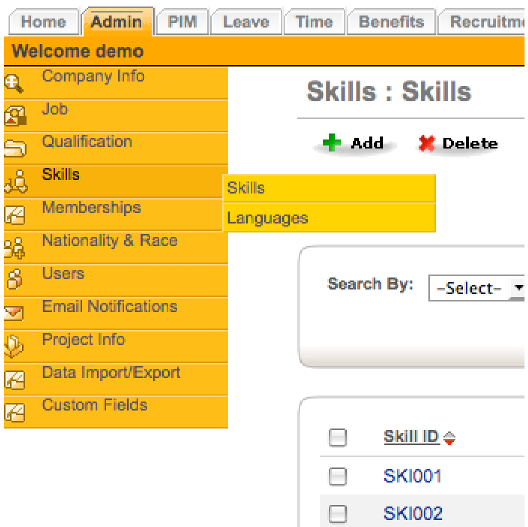
1. Select **Projects > Project Info**.
2. You'll see 3 options you'll need to configure.
    - **Customers**—Define internal or external customers.
    - **Projects**—Define the actual project details.
    - **Projects Activities**—Define activities that comprise the project.
3. Choose each, choose edit 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.

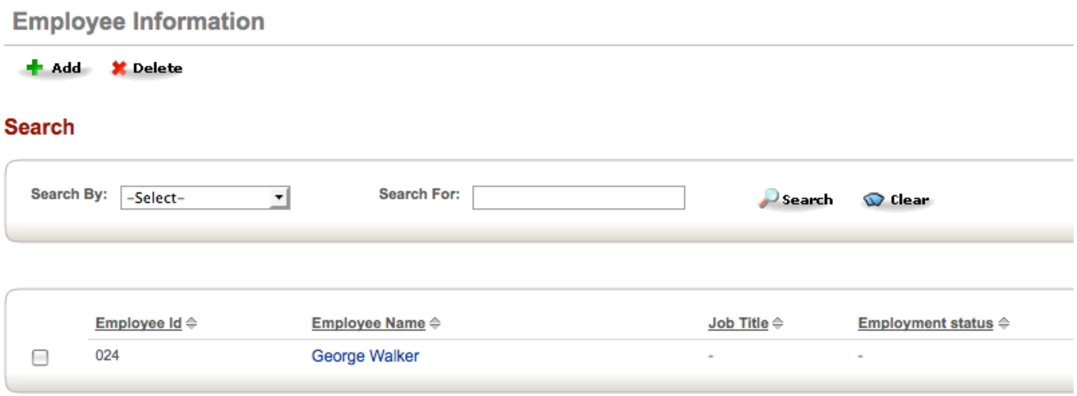
Adding Employee PIM Information

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.

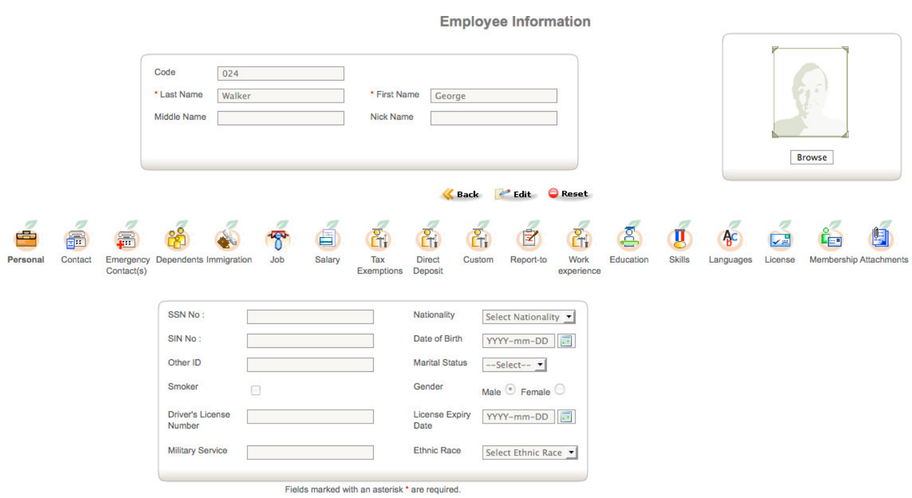
To add employee PIM information:

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

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



3. Enter the employee's name.
4. When finished, click **Save**. A second screen will appear.
5. 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).



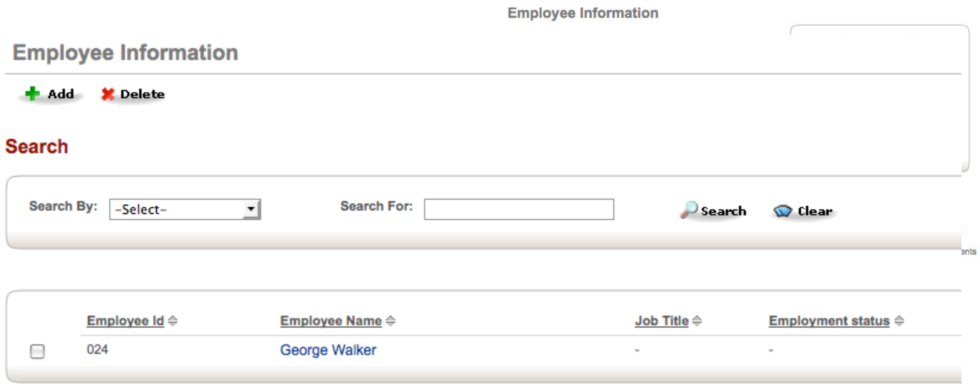
6. When finished, click the **PIM** module tab.

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.



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:

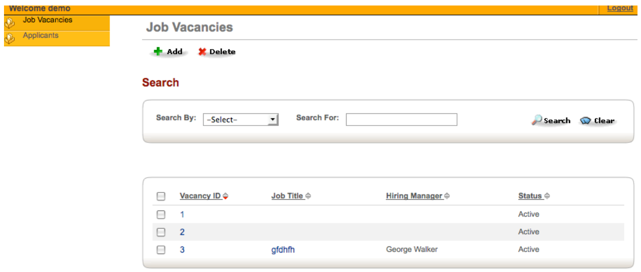
1. Click **Benefits**. You can manage the two following options:
    - **Health Savings Plan**
    - **Payroll Schedule**
2. Click **Health Savings Plan**.
3. Define your HSP, and then manage the details as employees register and use the program.
4. When finished, click **Payroll Schedule**. On this 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**.



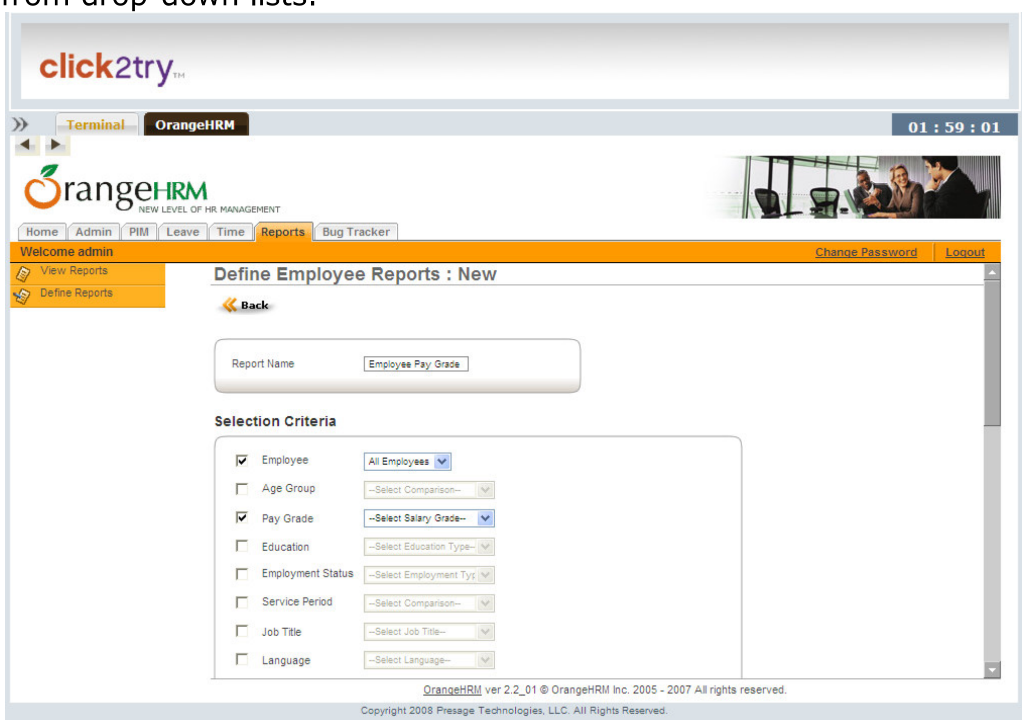
3. To add a new applicant or manage an existing applicant, click **Applicants**.
4. When you're finished, select another module (for example, Admin, PIM, Time) or click **Home**.

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.



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.