

I C E H R M
U S E R G U I D E

OPEN SOURCE
HUMAN RESOURCE MANAGEMENT

ICEHRM.COM

P O W E R F U L
B U T S I M P L E H R M
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Introduction

This book aims to be a comprehensive guide to IceHrm. We'll cover topics such as installing IceHrm and getting it up and running, configuring IceHrm and using icehrm modules.

What is IceHrm?

[IceHrm](#) is a Human resource management system for small and medium-sized organizations. It covers all the basic HRM needs of a company such as leave management, time management and handling employee information.

Installation

If you are using icehrm cloud please skip this chapter

Getting IceHrm installed only take a few minutes. If it ever becomes a problem, please [file an issue](#) describing the issue you encountered and how we might make the process easier.

Requirements

Before installing IceHrm please make sure your system supports following requirements you'll need to make sure your system has before you start.

- [PHP 5.3 or Higher](#)
- Net_Smtp extension for PHP
- [MySQL](#)
- [php-mysql extention](#) `$> sudo apt-get install php-mysql`
- [PHP GD library](#) `$> sudo apt-get install php7.0-gd`

Optional Modules

These are optional components which could improve icehrm performance

- [Memcache](#)

Installation

- If you are installing the open source version, download the latest release from [GitHub](#)
- If you are installing the pro version or enterprise you should have received the files after purchase.
- Copy the downloaded file to the path you want to install iCE Hrm in your server and extract.
- Create a mysql DB for and user. Grant all on iCE Hrm DB to new DB user.
- Visit iCE Hrm installation path in your browser.
- During the installation form, fill in details appropriately.
- Once the application is installed use the username = admin and password = admin to login to your system.

After installation the settings module can be accessed by login in as admin and going to System->Settings

Cron (Scheduled Task) for Notifications

Notification cron is used to send periodic notifications. Document expiry notifications will depend on this scheduler.

To trigger the scheduler you need to run following file

```
(IceHrm Root)/app/cron.php
```

Setting up Linux Cron

In linux environment a cron should be setup to run every 10 minutes.

This can be done by placing following line in your crontab. Depending on your server you can edit crontab `sudo vi /etc/crontab`

or you can use `crontab -e` command

```
/10 * (IceHrm Root)/app/cron.php
```

make sure that `(IceHrm Root)/app/cron.php` file is executable * Setting up Windows Scheduler For setting up the windows scheduler please check

<http://windows.microsoft.com/en-au/windows/schedule-task#1TC=windows-7>

Manual Installation

If you encountered any issues with automated installation please follow these steps to manually configure icehrm on your server.

Download and Extract IceHrm Latest Release

1. If you are using icehrm opensource version download it from (<https://github.com/gamonoid/icehrm/releases>). Make sure to download the release .zip or .gz file (e.g : icehrm_v19.0.OS.zip).
2. If you have purchased icehrm pro, you can find installation directory inside the files you have downloaded after purchase.
3. Extract icerm to public web directory root on your web server **for now we assume it to be (/var/www/)**

Creating MySQL Database

Login to your mysql installation and create a database and a user for icehrm

```
mysql> create database icehrm;  
mysql> create user 'icehrm_user'@'localhost' identified by 'icehrm_pwd';  
mysql> grant all on icehrm.* to 'icehrm_user'@'localhost';
```

Then execute icehrm database scripts on newly created mysql database via console or phpmyadmin.

The two files you need to execute can be found in icehrm installation directory (**assuming it to be /var/www/icehrm**)

1. /var/www/icehrm/scripts/icehrmdb.sql
2. /var/www/icehrm/scripts/icehrm__master__data.sql

```
mysql> use icehrm;  
mysql> source /var/www/icehrm/scripts/icehrmdb.sql  
mysql> source /var/www/icehrm/scripts/icehrm_master_data.sql
```

Creating Configuration File

Inside <icehrm>/app/ directory you will find:

```
config.sample.php
```

```
<?php
ini_set('error_log', '_LOG_');
define('APP_NAME', 'Ice Framework');
define('FB_URL', 'Ice Framework');
define('TWITTER_URL', 'Ice Framework');
define('CLIENT_NAME', '_CLIENT_');
define('APP_BASE_PATH', '_APP_BASE_PATH_');
define('CLIENT_BASE_PATH', '_CLIENT_BASE_PATH_');
define('BASE_URL', '_BASE_URL_');
define('CLIENT_BASE_URL', '_CLIENTBASE_URL_');
define('APP_DB', '_APP_DB_');
define('APP_USERNAME', '_APP_USERNAME_');
define('APP_PASSWORD', '_APP_PASSWORD_');
define('APP_HOST', '_APP_HOST_');
define('APP_CON_STR', 'mysqli://'.APP_USERNAME.':'.APP_PASSWORD.'@'.APP_HOST.'/'.APP_DB);
//file upload
define('FILE_TYPES', 'jpg,png,jpeg');
define('MAX_FILE_SIZE_KB', 10 * 1024);
//Home Links
define('HOME_LINK_ADMIN', CLIENT_BASE_URL."?g=admin&n=dashboard&m=admin_Admin");
define('HOME_LINK_OTHERS', CLIENT_BASE_URL."?g=modules&n=dashboard&m=module_My_Account");
```

Rename this file to `config.php` and start updating it.

You may change app name and social media urls to your company social media accounts:

```
define('APP_NAME', 'Ice Framework');
define('FB_URL', 'Ice Framework');
define('TWITTER_URL', 'Ice Framework');
define('CLIENT_NAME', '_CLIENT_');
```

So above section can be changed to:

By default `CLIENT_NAME` should be app

```
define('APP_NAME', 'IceHrm - Your Company Name');
define('FB_URL', 'https://facebook.com/yourcompany');
define('TWITTER_URL', 'https://twitter.com/yourhandle');
define('CLIENT_NAME', 'app');
```

For updating urls you need to know the absolute path of your icehrm installation and url to your icehrm installation.

For an example we assume path to icehrm is : **/var/www/icehrm/** and icehrm web url to be <http://your-company-domain.com/icehrm> then paths and urls should be updated as below.

```
define('APP_BASE_PATH', '/var/www/icehrm/');
define('CLIENT_BASE_PATH', '/var/www/icehrm/app/');
define('BASE_URL', 'http://your-company-domain.com/icehrm/');
define('CLIENT_BASE_URL', 'http://your-company-domain.com/icehrm/app/');
```

If you are using windows note that all the path should be specified with forward slash

e.g

```
define('APP_BASE_PATH', 'C:/xampp/htdocs/icehrm/');
```

Then you can update the database configurations as shown below:

```
define('APP_DB', 'icehrm');
define('APP_USERNAME', 'icehrm_user');
define('APP_PASSWORD', 'icehrm_pwd');
define('APP_HOST', 'localhost');
```

If you would like to upload files larger than 10MB you can update MAX_FILE_SIZE_KB config.

Global Settings

Setting	Description
Company: Name	Name of the company
Company: Logo	Company logo. You may upload the company logo here. Ideally should be 200px wide and height between 50px to 150 px.
Company: Description	A short description about the company. Will be used mainly in recruitment module
Email: Enable	Set this to "No" to disable all outgoing emails from modules. Value "Yes" will enable outgoing emails

Email Settings

Configuring Email with SMTP

Setting	Description
Email: Mode	This should be set to SMTP
Email: SMTP Host	If you are using local machine to send emails, set this to localhost. If not set the IP address of the server you are using to send emails
Email: SMTP Authentication	Set this to "Yes" if SMTP server authorization is enabled
Email: SMTP User	User name of the SMTP user
Email: SMTP Password	SMTP user password
Email: SMTP Port	Port configured in SMTP server (Default 25)
Email: Email From	From email address (e.g icehrm@mydomain.com)

Configuring Email with Amazon SES

Setting	Description
Email: Mode	This should be set to SES
Email: Amazon SES Key	Amazon access key Id (You can get this through AWS console)
Email: Amazon SES Secret	Amazon access key secret
Email: Email From	Authorized email address for sending emails through SES

Configuring Email with Gmail

Setting	Description
Email: Mode	This should be set to SMTP
Email: SMTP Host	ssl://smtp.gmail.com
Email: SMTP Authentication	Yes
Email: SMTP User	yourgmailaddress@gmail.com
Email: SMTP Password	Gmail password
Email: SMTP Port	465
Email: Email From	yourgmailaddress@gmail.com

Developer Settings

Setting	Description
System: Do not pass JSON in request	Select Yes if you are having trouble loading data for some tables
System: Reset Modules and Permissions	When this is set to "Yes" IceHrm will reset all values given in System->Permissions module. This setting can be used to reload permissions after adding new permissions to module meta.json file
System: Add New Permissions	Add new permissions without resetting modules
System: Debug Mode	Print debug log messages

Other Settings

Setting	Description
Leave: Share Calendar to Whole Company	If "Yes" all the employees of company can see other peoples' leave schedules. If set to "No" only admins and supervisors will be able to see leave schedule of subordinates
Leave: CC Emails	Every email sent though leave module will be CC to these comma seperated list of emails addresses
Leave: BCC Emails	Every email sent though leave module will be BCC to these comma seperated list of emails addresses
Attendance: Time-sheet Cross Check	Only allow users to add an entry to a timesheet only if they have marked attendance for the selected period
Recruitment: Show Quick Apply	Show quick apply button when candidates are applying for jobs. Quick apply allow candidates to apply with minimum amount of information
Recruitment: Show Apply	Show apply button when candidates are applying for jobs

Employee Management

Employees module is used to list, edit, add and search employees in your company. You can use the search box to search employees by ID, name or department. Also you can use filter button to filter employees by job title, department or supervisor.

Each employee is attached to a company structure. A company structure can be a Group, Company, Branch or a Department. Before adding employees you should first define your company structures

Company structure




























Company structure module allows you to define the structure of your company. Let you create parent structure of the company, branches, departments and other company units.

Company Structure

Company Graph

Add New +

Search

Name	Address	Type	Country	Time Zone	Parent Structure	
Your Company		Company	United States	(GMT) London		  
Head Office	PO Box 001002 Sample Road, Sample Town	Head Office	United States	(GMT) London	Your Company	  
Marketing Department	PO Box 001002 Sample Road, Sample Town	Department	United States	(GMT) London	Head Office	  
Development Center	PO Box 001002 Sample Road, Sample Town	Regional Office	Singapore	(GMT) London	Your Company	  
Engineering Department	PO Box 001002 Sample Road, Sample Town, 341234	Department	Singapore	(GMT) London	Development Center	  
Development Team		Unit	Singapore	(GMT) London	Engineering Department	  
QA Team		Unit	Singapore	(GMT) London	Engineering Department	  
Server Administration		Unit	Singapore	(GMT) London	Engineering Department	  
Administration & HR		Department	Singapore	(GMT) London	Development Center	  

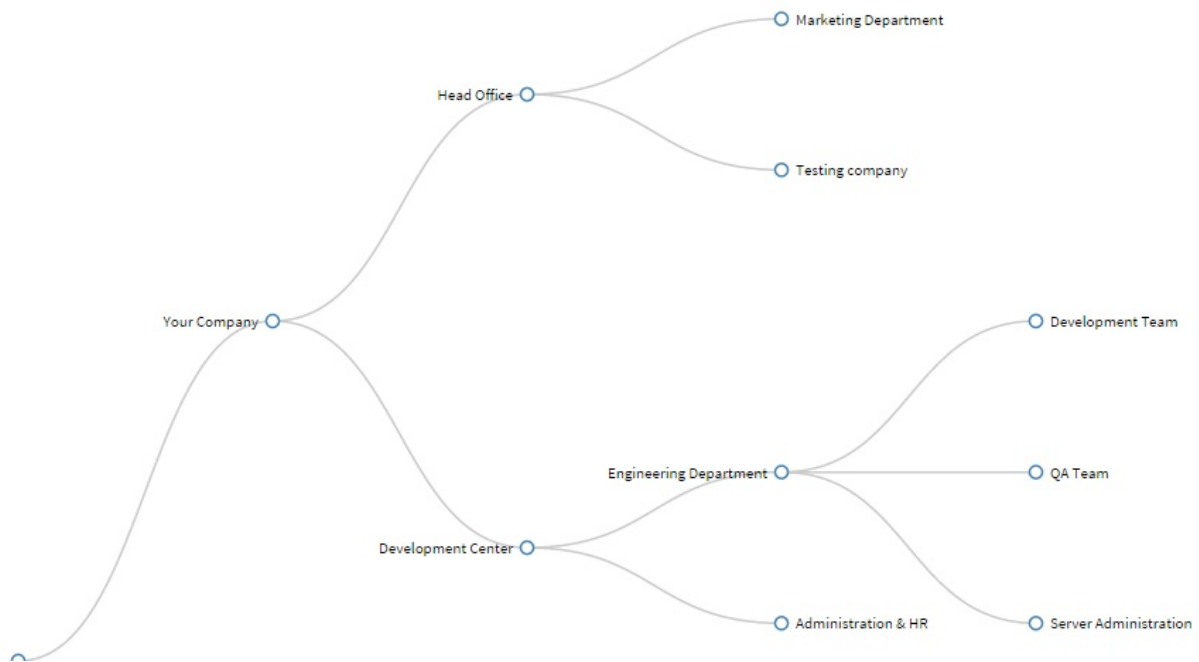
Showing 1 to 9 of 9 entries

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Next →

Also it provides a graphical overview of how each of your company units are connected.



Difference Between Users and Employees

A user is a person who can login to icehrm. It's not required for admin users to have an employee attached but each non admin user must have an associated employee. Having an employee added in icehrm won't allow the person to login to icehrm. You need to create a user with a Manager or Employee user level for that employee to be able to login to the system.

Adding Employees

Adding employees to ICE Hrm can only be done by the admin. The employee Id field should have a unique value. In order to complete adding an employee you need to provide job title, employment status and pay grade. These values can be defined in admin: Jobs module.

Once an employee is added to the system you will be asked to create a user for the newly added employee.


























Switching Employees

One of the key features of ICE Hrm, is admins and managers ability to login as another employee. This feature can be used to apply leaves, add attendance records or update timesheets behalf of other employees.

To login as an employee you can use the switch user icon on employee list or the "Switch Employee" menu in top right hand corner.

Employees	Skills	Education	Certifications	Languages	Dependents	Emergency Contacts	Documents	Deactivated Employees ▾
-----------	--------	-----------	----------------	-----------	------------	--------------------	-----------	-------------------------

Add New +
Filter ▾

Employee Number	First Name	Last Name	Mobile Phone	Department	Gender	Supervisor
 E002	Jason	Wood	440-953-4578	Branch - Germany	Male	   
 E001	Nicole	Smith		Branch - Singapore	Female	   
 E003	Alex	Stewart		Branch - Singapore	Male	   
 E004	Noah	Schmidt		Branch - Germany	Male	   
 E005	Johanna	Fischer		Branch - Germany	Female	   

Showing 1 to 5 of 5 entries

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Next →

Supervisors

- Any employee can be the supervisor of another employee.
- The supervisor of an Employee can be added by changing supervisor field of employee edit screen
- If the employee is having **Admin** or **Manager** user level, they can view all their subordinates (employees having the current employee as the supervisor) via **Employees => Employees** menu

Indirect Supervisors

- An employee can have multiple **Indirect Supervisors** which can be set via edit employee.
- Indirect supervisors are useful when approving leave requests (You can allow indirect supervisors to approve leave requests via **Settings -> Leave/PTO**)

Department Heads

- One or more employees can be added to a department as a head of a department.
- A department head can view and manage all employees under that department or substructures of this department give following settings under **System -> Settings -> System** :
 - "System: Company Structure Managers Enabled"
 - "System: Child Company Structure Managers Enabled"

3. You can define **Department Heads** via **Admin -> Company Structures**

Name*	<input type="text" value="Marketing Department"/>
Details*	<input type="text" value="Marketing Department"/>
Address	<input type="text" value="PO Box 001002
Sample Road, Sample Town"/>
Type*	<input type="text" value="Department"/>
Country*	<input type="text" value="United States"/>
Time Zone*	<input type="text" value="(GMT) London"/>
Parent Structure	<input type="text" value="Head Office"/>
Heads*	<input type="text" value="x Taylor Holmes"/>

Deleting Employee Data

In order to delete an employee, an admin should first click the **"Terminate Employee"** button on employee list. But we do not delete the employee data at this time. Instead employee is moved to **"Temporarily Deactivated Employees"** tab. When an employee is in **"Temporarily Deactivated Employees"** list, you can recover all the employee data with one click.

If you delete the employee from **"Temporarily Deactivated Employees"** tab, Employee profile will be moved to **"Terminated Employee Data"** tab. At this point you can not recover the employee, but still you can download all the data for employee in JSON format.

If you want to remove all the data related to the employee you can delete data in **"Terminated Employee Data"** also.

When billing for cloud-hosted installation, we consider count of active employees and employees under **"Temporarily Deactivated Employees"** tab. So if you do not want to get billed for an employee you need to delete the employee from **"Temporarily Deactivated Employees"** tab also.

Employee History

You can view details on how employee data changed over the time you can use **Employees**
=> **Employee History**

Employee Basic Details			
Filter ▼		Search	
Employee	Description	Created (GMT)	
Johanna Fischer	Supervisor updated from Jason Wood to Noah Schmidt	2018 Apr 10 02:55	
Johanna Fischer	Supervisor updated from Johanna Fischer to Jason Wood	2018 Apr 10 02:52	
Johanna Fischer	Indirect Supervisors updated from to Jason Wood	2018 Apr 10 01:22	
Noah Schmidt	Job Title updated from Chief Executive Officer to Technical Project Manager	2018 Apr 10 01:22	
Noah Schmidt	Job Title updated from Assistant QA Engineer to Chief Executive Officer	2018 Apr 10 01:22	
Nicole Smith	Indirect Supervisors updated from Jason Wood to	2018 Apr 05 03:57	
Alex Stewart	Gender updated from Female to Male	2018 Apr 02 07:06	
Johanna Fischer	Department updated from Branch - Singapore to Branch - Germany	2018 Apr 01 07:01	
Noah Schmidt	Department updated from Branch - Singapore to Branch - Germany	2018 Apr 01 07:01	

Job Details Setup

(Admin > Job Details Setup)

Here you can set up all the information related to job titles, pay grades and employment status in your company.

Qualifications Setup

(Admin > Qualifications Setup)

Skills, Educational Details, Certifications and Languages you define under qualifications setup module will be used by employees or admins to attach these qualifications to their profiles.

Employee Data Import

You can import data into icehrm using CSV files. By default, we support importing basic employee details and attendance data. This feature should be used only during the initial setup.

Preparing Employee Data for Upload

1. Download sample data file [here](#)
2. The file has following columns which matches with default employee data file definition
 - employee_id = The id of the employee (this id should be unique, if the employee with same id exists in the system then employee details will be replaced)
 - first_name, middle_name, last_name = Employee names
 - address1,address2,home_phone,mobile_phone,work_email = Employee contact details
 - gender = Male or Female
 - marital_status = Married, Single, Divorced, Widowed, Other
 - birthday = MM/DD/YY format
 - Nationality/nationality = Any nationality defined in System -> Manage Meta Data -> Nationality
 - Ethnicity/ethnicity = Any ethnicity defined under System -> Manage Meta Data -> Ethnicity
 - EmergencyContact/name = Emergency contact name
 - EmergencyContact/relationship = Emergency contact relationship
 - EmergencyContact/home_phone = Emergency contact phone
 - ssn_num = Social security number or ID number
 - job_title = Job Title (this should be predefined in Admin -> Job Details Setup -> Job Titles)
 - employment_status = Employment Status (should be predefined in Admin -> Job Details Setup -> Employment Status)
 - joined_date = Joined date in MM/DD/YY format
 - department = Company Structure this employee is attached to (predefined in Admin -> Company Structure)

Importing Basic Employee Data

1. Login as Admin and Navigate to System -> Data Import Files and create a new entry with the file created in the previous step

Name*

Data Import Definitions*

File to Import* Download Upload Remove

Last Export Result

Cancel Save

- Once the entry is created click on "Process"

Search			
Name	Data Import Definition	Status	
Initial Employee Data Import	Employee Data Import	Not Processed	Process

Showing 1 to 1 of 1 entries

← Previous 1 Next →

Creating Data Importers

You can create data importers for importing custom fields or any other additional fields into employees.

Creating a Data Importer for Updating Supervisors

Here is an example of creating a Data Importer for updating supervisors and some custom fields

- Login as Admin and Navigate to System -> Data Importers
- Create a new Data Importer named "Supervisor and Custom Field Importer" and Data Type should be "EmployeeDataImporter"

Name*

Data Type*

Details

Columns Add Reset

Cancel Save

- Each importer should have one ID column. For employees, the id column should be

employee_id. Here is how you can add this unique id column.

4. Edit the newly created data importer and add a new column named employee_id. Note that the value "is key field" is true

Name*	<input type="text" value="employee_id"/>
Filed Title	<input type="text" value="Empolyee Id"/>
Type*	<input type="text" value="Normal"/>
Depends On	<input type="text" value="N/A"/>
Depends On Field	<input type="text"/>
Is Key Field*	<input type="text" value="No"/>
Is ID Field*	<input type="text" value="Yes"/>
<input type="button" value="+ Done"/>	

5. Then add the column for Supervisor. We call this type of a column a reference type column because it depends on another row in a different or same entity

Name*	<input type="text" value="supervisor"/>
Filed Title	<input type="text" value="Supervisor"/>
Type*	<input type="text" value="Reference"/>
Depends On	<input type="text" value="Employee"/>
Depends On Field	<input type="text" value="employee_id"/>
Is Key Field*	<input type="text" value="Yes"/>
Is ID Field*	<input type="text" value="No"/>
<input type="button" value="+ Done"/>	

6. Note that we have set "is key field" to true.
7. Then you can add a sample custom field to the employees (via System -> Field Names Setup -> Employee Custom Fields).

8. For now, we will add a custom field named Contract End Date

Name*	<input type="text" value="contract_end_date"/>
Display Status*	<input type="text" value="Show"/>
Field Type*	<input type="text" value="Date"/>
Field Label*	<input type="text" value="Contract End Date"/>
Validation	<input type="text" value="None"/>
Field Options	<input type="button" value="Add"/> <input type="button" value="Reset"/>
Priority*	<input type="text" value="0"/>
Display Section*	<input type="text" value="Contract Details"/>

9. Now you can add a column to the existing data importer for importing data for "Contract

Name*	<input type="text" value="contract_end_date"/>
Field Title	<input type="text" value="Contract End Date"/>
Type*	<input type="text" value="Normal"/>
Depends On	<input type="text" value="N/A"/>
Depends On Field	<input type="text" value=""/>
Is Key Field*	<input type="text" value="No"/>
Is ID Field*	<input type="text" value="No"/>

End Date"

10. Now you can create the CSV file for importing supervisor and contract end date for employees. In the CSV file, there should be three columns defined for Employee Id, Supervisor and Contract End Date. The supervisor field should hold the employee_id of the supervisor.
11. Download the file already created CSV file for this step from [here](#)
12. Create a "Data Import File" for uploading the new file

Name*

Employee Supervisors

Data Import Definitions*

Supervisor and Custom Field Importer

File to Import*

file_ROp8GKxvk1sXXC1482780913743

Download

Upload

Remove

Last Export Result

Cancel

Save

13. Process the file

Attendance Module

IceHrm has several different tools for managing and recording employee time.

Attendance Tracking

Attendance represents the time you were in office.

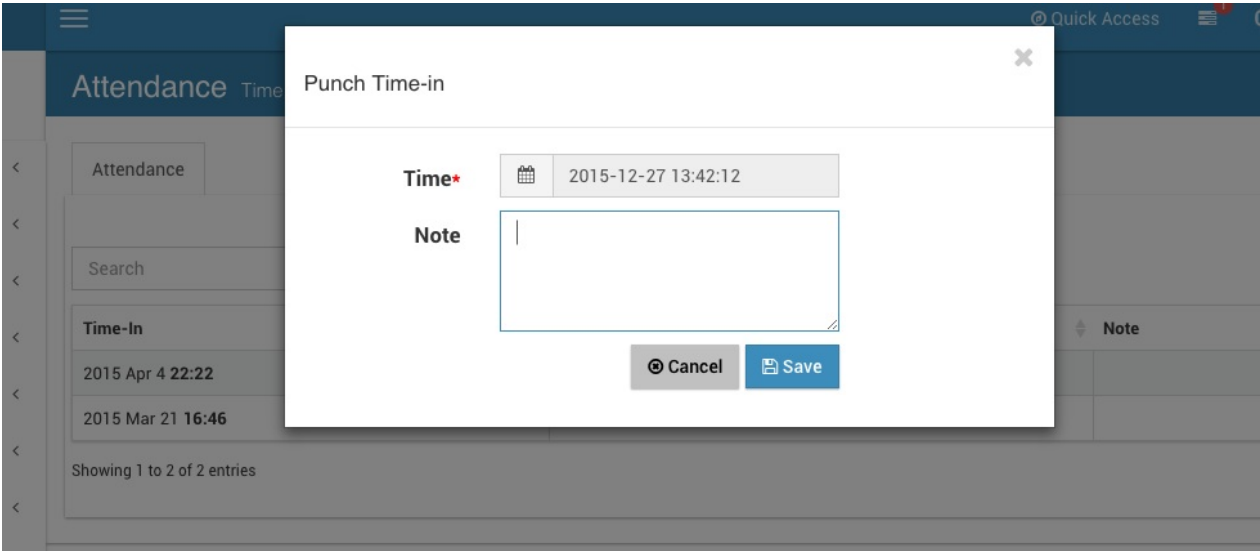
Recoding Attendance

Employees can record attendance via Time Management -> Attendance. While recording attendance they can select the time they arrive and leave the office.

When tracking attendance you can either let your employees enter the time when recording attendance or configure it to use server time.

Attendance Tracking with User Time

Under `System -> Settings` set `Attendance: Use Department Time Zone` to No. This will let yours select the time when punching in and out.

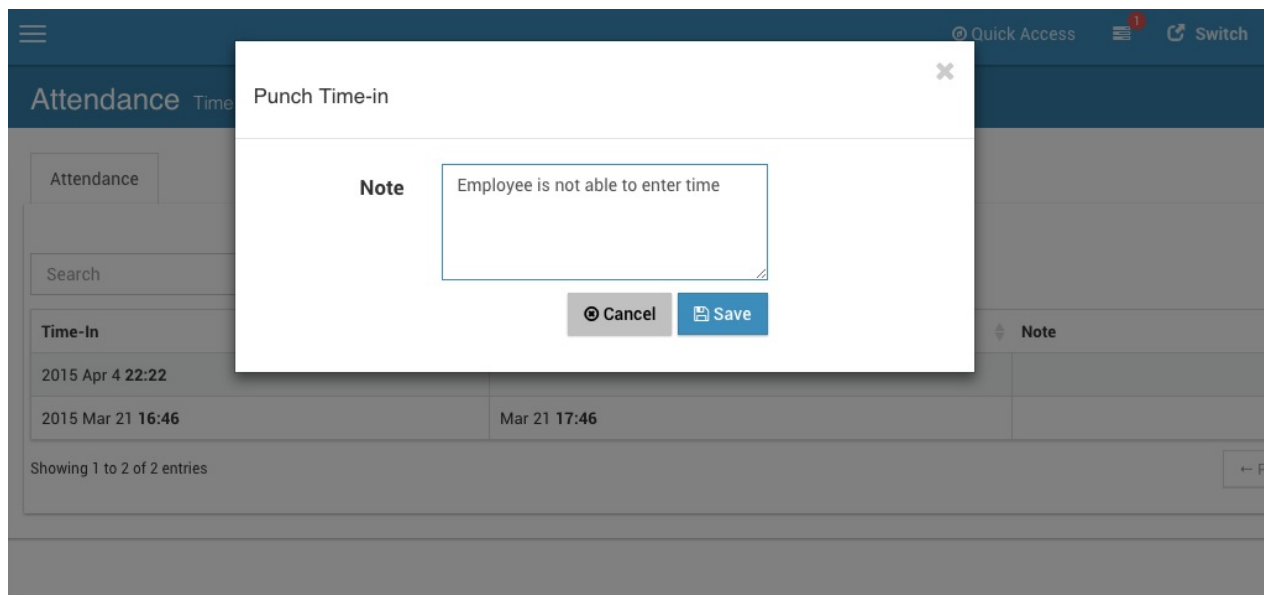


The screenshot displays the 'Punch Time-in' modal window in the IceHrm application. The modal has a title bar with a close button. Inside, there is a 'Time*' label next to a date and time picker showing '2015-12-27 13:42:12'. Below this is a 'Note' label followed by a large text input area. At the bottom right of the modal are 'Cancel' and 'Save' buttons. The background shows the 'Attendance' module interface, including a search bar, a 'Time-In' section with a list of entries (e.g., '2015 Apr 4 22:22', '2015 Mar 21 16:46'), and a 'Showing 1 to 2 of 2 entries' message.

Attendance Tracking with Server Time

Every employee should be attached to a department. These departments are defined under `Admin -> Company Structure` and you should have a time zone for each department defined. When an employee attached to a department records attendance icehrm uses the time in

departments timezone to generate the correct time. All you need to do is set the proper time zone and set `Attendance: Use Department Time Zone` to Yes.



Monitoring Attendance

Attendance details of employees can be viewed/edited via `Employees => Monitor attendance` module. Admin users can view all employee attendance while Managers can view attendance data for subordinates (direct reports).

Uploading Attendance Data

You can upload attendance data from your attendance recording devices instead of allowing employees to punch in/out using icehrm.

1. Download the sample attendance file from [here](#)
2. Then add your attendance data in the same format.
3. Goto `System -> Data -> Data Import Files` tab

4. Create a new data import as shown below. Use a descriptive name

Data Importers

Data Import Files

Name*

Attendance Data 2018-04-19

Data Import Definitions*

Attendance Data Import

File to Import*

file_kJmuU99kCvmaxb1524130470923

Download

Upload

Remove

Last Export Result

Cancel

Save

5. Save and from the "data import file list" click process button

Data Importers

Data Import Files

Add New +

Search

Name	Data Import Definition	Status	
Attendance Data 2018-04-19	Attendance Data Import	Not Processed	<div>Process</div>

Showing 1 to 1 of 1 entries




Previous

1


Next

Attendance with photo proof

Punch Time-in



Time*

 2017-07-05 09:43:15

Note

Cancel

Save

This feature lets your employees take a photo of him/her at the office or at any place you want them to be via the webcam when punching in or out. This help to make sure the employee is at his/her desk when adding attendance entry.

[Read more about this here](#)

Attendance Sheets

Attendance Sheets which can be accessed via `Time Management => Attendance Sheets` is a way for employees to group attendance details for the whole week and send it for approval to the supervisor. This feature is useful when you pay employees based on attendance. In such cases, there should be an approval process in place.





















All My Attendance Sheets

Approved Attendance Sheets

Pending Attendance Sheets

Subordinate Attendance Sheets

Search

Start Date	End Date	Total Time	Status	
Apr 15, 2018 (Sunday)	Apr 21, 2018 (Saturday)	08:00	Pending	 
Apr 8, 2018 (Sunday)	Apr 14, 2018 (Saturday)	00:00	Pending	 
Apr 1, 2018 (Sunday)	Apr 7, 2018 (Saturday)	00:00	Pending	 
Mar 25, 2018 (Sunday)	Mar 31, 2018 (Saturday)	00:00	Pending	 
Mar 18, 2018 (Sunday)	Mar 24, 2018 (Saturday)	00:00	Pending	 
Mar 11, 2018 (Sunday)	Mar 17, 2018 (Saturday)	00:00	Pending	 
Jan 14, 2018 (Sunday)	Jan 20, 2018 (Saturday)	00:00	Pending	 
Dec 31, 2017 (Sunday)	Jan 6, 2018 (Saturday)	00:00	Pending	 
Dec 24, 2017 (Sunday)	Dec 30, 2017 (Saturday)	00:00	Pending	 
Dec 17, 2017 (Sunday)	Dec 23, 2017 (Saturday)	41:32	Pending	 

Showing 1 to 10 of 10 entries

← Previous

1

Next →

Timesheets

Timesheet is a document which indicates the hours an employee has worked, separated by days of the week.

In IceHrm employees can edit timesheets under `Time Management => Time Sheets`. The current week time sheet is automatically created and time sheets for past weeks can be created by clicking “Create Previous Timesheet” action button on a time sheet.

Projects and Clients

Before starting to populate timesheets you should configure projects and clients. This can be done via `Admin => Project / Clients setup` tab.

Each and every project is attached to a client. Because of that, IceHrm allows adding clients with basic information. Once clients are added, you can start creating a project for these clients. The client section represents both external and internal clients of the company. That way you can attach each and every project to a client.

Note: IceHrm is not a project management tool. Because of that we only store minimum details about clients and project. This information is only used for Timesheets.

Adding Time to Timesheets

Employees can edit timesheets via `Time Management => Time Sheets => All My Timesheets`

All My TimeSheets	Approved TimeSheets	Pending TimeSheets	Subordinate TimeSheets
<div>Search</div>			
Start Date	End Date	Total Time	Status
Apr 15, 2018 (Sunday)	Apr 21, 2018 (Saturday)	00:00	Pending
Apr 8, 2018 (Sunday)	Apr 14, 2018 (Saturday)	00:00	Pending
Apr 1, 2018 (Sunday)	Apr 7, 2018 (Saturday)	00:00	Pending
Mar 25, 2018 (Sunday)	Mar 31, 2018 (Saturday)	00:00	Pending
Mar 18, 2018 (Sunday)	Mar 24, 2018 (Saturday)	00:00	Pending
Mar 11, 2018 (Sunday)	Mar 17, 2018 (Saturday)	00:00	Pending
Jan 14, 2018 (Sunday)	Jan 20, 2018 (Saturday)	00:00	Pending
Dec 31, 2017 (Sunday)	Jan 6, 2018 (Saturday)	00:00	Pending
Showing 1 to 8 of 8 entries			
<div>← Previous 1 Next →</div>			

By clicking edit timesheet button you can start adding time entries to the timesheet. Time entries are associated with projects. On each timesheet, you can add time for each project for each day of the week.

All My TimeSheets
Approved TimeSheets
Pending TimeSheets
Subordinate TimeSheets

Timesheet From Apr 15, 2018 (Sunday) to Apr 21, 2018 (Saturday)

Search

	(Sun) 15 Apr	(Mon) 16 Apr	(Tue) 17 Apr	(Wed) 18 Apr	(Thu) 19 Apr	(Fri) 20 Apr	(Sat) 21 Apr
Project 1	4	6	5				
Project 2	2	1					
Project 3	2						
Project 4		1.4					
Total	8	8.4	5				

Showing 1 to 5 of 5 entries

← Previous 1 Next →

Cancel
Save
Download
Submit

Here you can add your time. (make sure to add time in hours as decimals. e.g: for 2 hours and 15 minutes you should add 2.25)

All My TimeSheets
Approved TimeSheets
Pending TimeSheets
Subordinate TimeSheets

Search

Start Date	End Date	Total Time	Status	
Apr 15, 2018 (Sunday)	Apr 21, 2018 (Saturday)	21:24	Pending	🔍 📄 🖨

Make sure to click save button to save your changes to the timesheet. Total time in timesheet list also updated according to your changes.

Project List on Timesheet

By default all the defined projects under `Admin => Projects / Client Setup` is displayed in timesheets of all the employees.

However, to limit only selected projects to an employee:

1. Set the value of `"Projects: Make All Projects Available to Employees"` setting under `System => Settings => Other` to `"No"`
2. Add only required projects to employees under `Admin => Projects / Client Setup => Employee Projects`










View Timesheets

Timesheets details can be viewed by clicking on the view icon of any of your timesheets.

All My TimeSheets	Approved TimeSheets	Pending TimeSheets	Subordinate TimeSheets
-------------------	---------------------	--------------------	------------------------

Timesheet From Apr 1, 2018 (Sunday) to Apr 7, 2018 (Saturday)

Sun 4/1	Mon 4/2	Tue 4/3	Wed 4/4	Thu 4/5	Fri 4/6	Sat 4/7
	4.45 h - Project 3	6 h - Project 3	6 h - Project 1	7 h - Project 1	8 h - Project 1	
	3 h - Project 2	1.25 h - Project 1	2.2 h - Project 4			
	2 h - Project 1					

Start	End	Duration	Project	Details
 Apr 2, 2018 [00:00 AM]	Apr 2, 2018 [02:00 AM]	Hours (2) - Min (0)	Project 1	
 Apr 2, 2018 [00:00 AM]	Apr 2, 2018 [03:00 AM]	Hours (3) - Min (0)	Project 2	
 Apr 2, 2018 [00:00 AM]	Apr 2, 2018 [04:27 AM]	Hours (4) - Min (27)	Project 3	
 Apr 3, 2018 [00:00 AM]	Apr 3, 2018 [01:15 AM]	Hours (1) - Min (15)	Project 1	
 Apr 3, 2018 [00:00 AM]	Apr 3, 2018 [06:00 AM]	Hours (6) - Min (0)	Project 3	
 Apr 4, 2018 [00:00 AM]	Apr 4, 2018 [06:00 AM]	Hours (6) - Min (0)	Project 1	
 Apr 4, 2018 [00:00 AM]	Apr 4, 2018 [02:12 AM]	Hours (2) - Min (12)	Project 4	
 Apr 5, 2018 [00:00 AM]	Apr 5, 2018 [07:00 AM]	Hours (7) - Min (0)	Project 1	
 Apr 6, 2018 [00:00 AM]	Apr 6, 2018 [08:00 AM]	Hours (8) - Min (0)	Project 1	
















Timesheet Approval

After adding your time entries you can submit your timesheet for approval. The supervisor should receive a notification.

All My TimeSheets	Approved TimeSheets	Pending TimeSheets	Subordinate TimeSheets
-------------------	---------------------	--------------------	------------------------

Filter ▼

Search

Employee	Start Date	End Date	Status	
Nicole Smith	Apr 15, 2018 (Sunday)	Apr 21, 2018 (Saturday)	Pending	  
Noah Schmidt	Apr 15, 2018 (Sunday)	Apr 21, 2018 (Saturday)	Pending	  
Nicole Smith	Apr 8, 2018 (Sunday)	Apr 14, 2018 (Saturday)	Pending	  
Noah Schmidt	Apr 8, 2018 (Sunday)	Apr 14, 2018 (Saturday)	Pending	  
Nicole Smith	Apr 1, 2018 (Sunday)	Apr 7, 2018 (Saturday)	Submitted	  

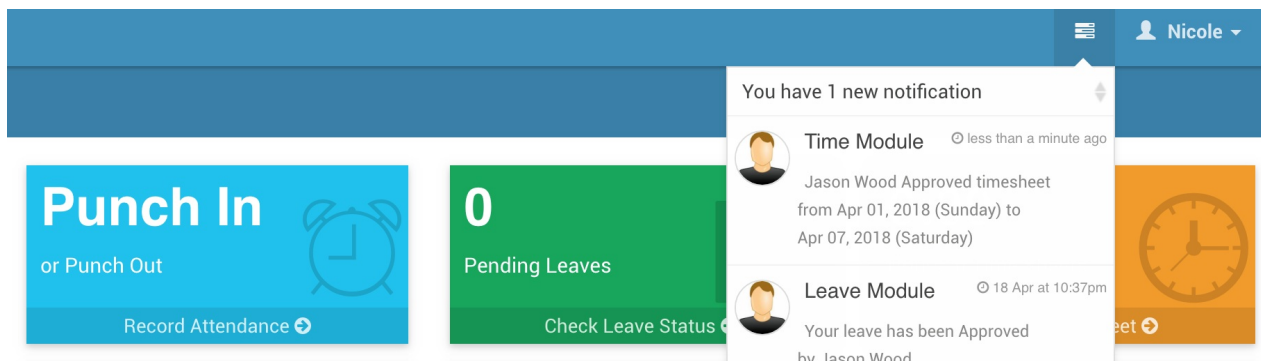
Showing 1 to 5 of 5 entries

Change TimeSheet Status

Previous

Next

Supervisor of the employee can view the timesheet under **Time Management => Time Sheets**
=> **Subordinate TimeSheets** and approve or reject it.

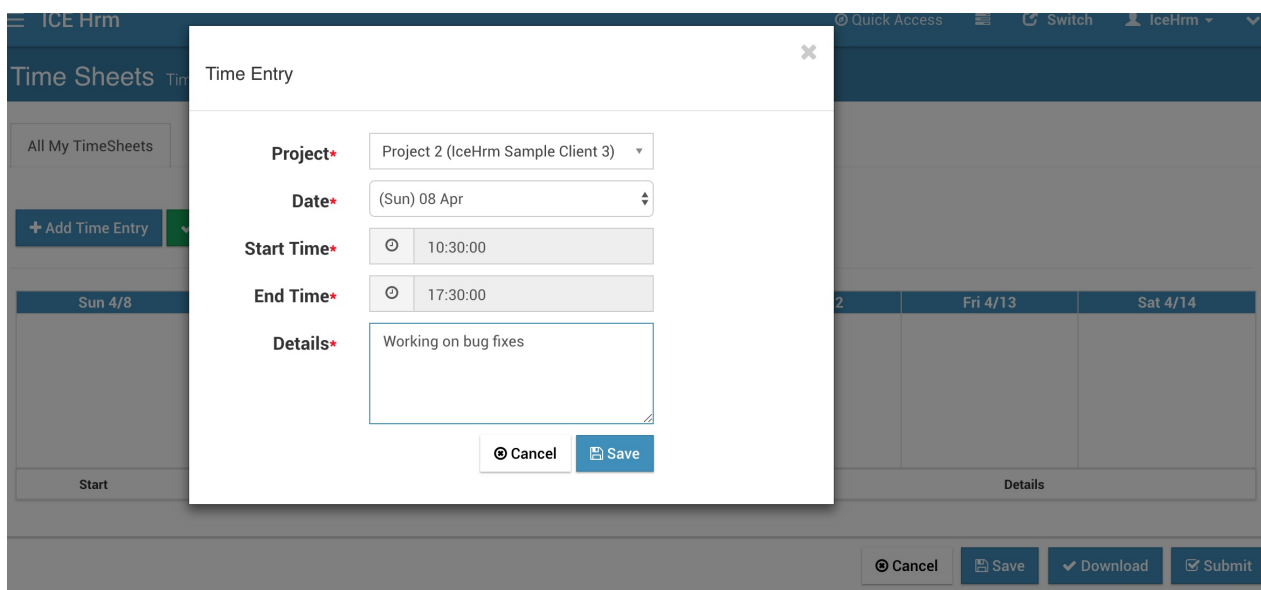


Detailed Timesheets

In IceHrm there is an alternative way to add timesheets. This is useful if you want to add additional details like task the employee was working on with exact start and end time to the timesheet.

In order to activate this feature set the setting "System: Time-sheet Entry Start and End time Required" to "Yes" under `System => Settings => System` tab.

Then when the employee is editing the timesheet the view will be different and he/she should be able to add more details.



Leave and Vacation Management

IceHrm has once of the best leave management systems among all the HRM software. Leaves module is used to define all the elements required to manage leave application process of your company,

including:

- Leave periods
- Leave types
- Work week
- Holidays
- Leave rules

Leave Periods

A leave period usually a year but can be different according to company HR processes. Leave periods can't overlap, which means if an employee applied for annual leaves in leave period for "Year 2014", his leave balance in leave period "Year 2015" won't get affected. This is same for all types of leaves. Also if the leave period for year 2015 is not defined, employees won't be able to apply leaves for 2015.

Leave Types

Leave type tab defines types of leaves which can be applied by employees.

Leaves Admin

Leave Types

Leave Period

Work Week







Holidays

Leave Rules

Employee Leaves

Add New +

Search

Leave Name	Leave Accrue Enabled	Leave Carried Forward	Leaves Per Year	
Annual leave	No	No	14	 
Casual leave	No	No	7	 
Medical leave	No	No	7	 

Showing 1 to 3 of 3 entries

← Previous

1

Next →

Adding a new Leave Type

When adding a leave type you need to set following fields

Leaves Admin

Leave Types	Leave Period	Work Week	Holidays	Leave Rules	Employee Leaves
Leave Name*	Annual leave				
Admin can assign leave to employees*	No				
Employees can apply for this leave type*	Yes				
Employees can apply beyond the current leave balance*	No				
Leave Accrue Enabled*	No				
Leave Carried Forward*	No				
Leaves Per Year*	14				
					<div>Cancel</div> <div>Save</div>

Field	Description
Admin can assign leave to employees	If “Yes” is selected, an Admin or a Manager is able to login as an employee (Please check switch employee concept explained in employee module) and apply this type of leaves behalf of the employee.
Employees can apply for this leave type	If “No” is selected; only an Admin or a Manager is allowed to assign this type of leave to an employee. (An employee won’t be able to apply this type of leave).
Leaves per Year	This is the number of leaves can be applied by an employee per year (or the current leave period). If the leave period is less than a Year this is the number of leaves for the leave period.
Leave Accrue Enabled	If this is set to “Yes”, employees won’t have all the leaves added to their leave balance at the beginning of the leave period. Instead leaves get accrued for every passing day in leave period. For an example if for a particular leave type number of leaves per period is defined as 24 and leave period (having 12 months) is stating from January, at the end of January an employee will be able apply for 2 leaves of this leave type (24/12)
Leave Carried Forward	If an employee has some leave balance remaining in previous leave period, that amount will get add to the current leave period.

Percentage of Leaves Carried Forward	In each year (or period) what percentage of remaining leaves should be carried forward.
Maximum Carried Forward Amount	Maximum number of leave days which can be carried forwarded from one year to another. Set to 0 for unlimited
Carried Forward Leave Availability Period	For how many days carried forward leaves are available from the start date of next leave period.
Proportionate Leaves on Joined Date	Whether the available number of leaves should be calculated based on number of days employee work in a given leave period. (e.g if an employee joined in end of June, he/she will only get half of the number of leaves specified for given leave type.

Work Week

Work week defines the days that your employees are working. When an employee is applying for a leave, work week is taken into consideration. For an example if you company works only from Monday to Friday and if an employee applied for a leave for two continuous weeks including weekends, Saturdays and Sundays will NOT be counted for leave application.

In some cases, companies need to keep different workweeks for different countries. For an example if your branch in UK works a half a day on Saturday then you can add that as shown on following image. All the leave calculations of UK based employees (employee: country field should be set to UK) will be done according to extended workweek defined for UK.

Leaves Admin

Leave Types Leave Period **Work Week** Holidays Leave Rules Employee Leaves





Add New +

Filter ▼

Day	Status	Country	
Monday	Full Day	For All Countries	
Tuesday	Full Day	For All Countries	
Wednesday	Full Day	For All Countries	
Thursday	Full Day	For All Countries	
Friday	Full Day	For All Countries	
Saturday	Non-working Day	For All Countries	
Sunday	Non-working Day	For All Countries	
Saturday	Half Day	United Kingdom	 







Holidays

Holidays defines the list of holidays for all leave periods. It is advised to define all holidays for all the enabled leave periods. If an employee applies for a leave which includes a holiday, the leave for holiday won't be counted. Just like the workweek, you can have different holidays defined for different countries. In following example 2014-12-18 defined as a holiday only for UK.

Name	Date	Status	Country	
New Year's Day	2014-01-01	Full Day	For All Countries	 
Chinese New Year	2014-02-10	Full Day	For All Countries	 
Chinese New Year	2014-02-11	Full Day	For All Countries	 
Good Friday	2014-03-29	Full Day	For All Countries	 
Labour Day	2014-05-01	Full Day	For All Countries	 
Vesak Day	2014-05-24	Full Day	For All Countries	 
Hari Raya	2014-08-08	Full Day	For All Countries	 
Singapore National Day	2014-08-09	Full Day	For All Countries	 
Hari Raya Haji	2014-10-15	Full Day	For All Countries	 
Deepavali	2014-11-04	Full Day	For All Countries	 
Christmas Day	2014-12-25	Full Day	For All Countries	 
US 1	2014-08-27	Full Day	United States	 
All 1	2014-08-28	Full Day	For All Countries	 
UK only leave	2014-12-18	Full Day	United Kingdom	 

Employee leaves

Employee leaves tab lists all the employee leaves. An administrator can view details of leaves and take actions on it (Approve or Reject). Admin should usually use this feature when the Supervisor of the person who applied the leave is not able to do it.

Employee	Leave Type	Leave Start Date	Leave End Date	Status	
Lala Lamees	Annual leave	2014-06-05	2014-06-11	Approved	  
Taylor Holmes	Medical leave	2014-06-04	2014-06-04	Pending	  

Showing 1 to 2 of 2 entries

← Previous 1 Next →

Employee Leave Entitlement

All My Leaves	Leave Entitlement	Approved Leave	Pending Leave	Subordinate Leave	Cancellation Requests
---------------	-------------------	----------------	---------------	-------------------	-----------------------

Leave Type	Available Leaves	Pending Leaves	Approved Leaves	Rejected Leaves	Leaves to be Accrued	Leaves Carried Forward
Annual leave	6.962	0	7	0	0.038	0
Casual leave	7	0	0	1	0	0
Medical leave	7	0	0	0	0	0

Showing 1 to 3 of 3 entries

← Previous 1 Next →

All the employees are allowed to check there leave entitlement. It show a summery of their leave balances for the current leave period.

Field	Description
Available Leaves	Number of leave remaining that you can apply during current leave period
Pending Leaves	Number of leave you have applied but not approved or rejected
Leaves to be Accrued	If the Leave Accrue Enabled is set for the leave type, this will show how many leave days will be added to your leave balance by end of current leave period
Leaves Carried Forward	Leave days carried forward from previous leave periods

Leave Groups

Leave groups can be used to:

1. Group a set of employees and create leave rules affecting all employees in the group.

2. Selectively allow some leave types only to a group of employees (for an example you can assign Maternity leaves only to female employees)

In order to do this:

- First create the leave group under “Leave Settings”->”Leave Groups”->”Edit Leave Groups”.

Employee	Leave Group
Sofia O'Sullivan	Female employees group
Lala Lamees	Female employees group

- Add employees to leave group
- Create a leave type for Maternity leave by specifying “Female employees group”. Now only employees added to that group will be able to apply for maternity leaves

Leave Rules By Examples

Leave rules is one of the unique and advanced features of ICE Hrm. Using leave rules you can overwrite the behavior of leave types for job titles, employment statuses or even individual employees.

Following examples will show you the proper way to use leave rules

Example 1

To enable all Software Engineers to apply for 20 annual leaves, you need to add a new leave rule as shown below

Leave Type*	Annual leave	▼
Job Title*	Software Engineer	▼
Employment Status*	Select	▼
Employee*	Select	▼
Admin can assign leave to employees*	No	▼
Employees can apply for this leave type*	Yes	▼
Employees can apply beyond the current leave balance*	No	▼
Leave Accrue Enabled*	No	▼
Leave Carried Forward*	No	▼
Leaves Per Year*	20	

Cancel

Save

Example 2

Enable all Software Engineers who are permanent employees to apply for 10 medical leaves

Leave Type*	Medical leave	▼
Job Title*	Software Engineer	▼
Employment Status*	Full Time Permanent	▼
Employee*	Select	▼
Admin can assign leave to employees*	Yes	▼
Employees can apply for this leave type*	Yes	▼
Employees can apply beyond the current leave balance*	No	▼
Leave Accrue Enabled*	No	▼
Leave Carried Forward*	No	▼
Leaves Per Year*	10	

Cancel

Save

Example 3

Do not allow contact workers to apply for casual leaves. Only administrator is allowed to apply casual leaves behalf of them with a maximum limit of 5 leaves per leave period

Leave Type*	Casual leave ▼
Job Title*	Select ▼
Employment Status*	Full Time Contract ▼
Employee*	Select ▼
Admin can assign leave to employees*	Yes ▼
Employees can apply for this leave type*	No ▼
Employees can apply beyond the current leave balance*	No ▼
Leave Accrue Enabled*	No ▼
Leave Carried Forward*	No ▼
Leaves Per Year*	5

Implementing a Sample Leave Policy

Setting Up Leave Module

Since I've have noticed that its not a trivial task to setup the icehrm leave module initially when moving from another active leave management setup, I'm writing this to walk you through a short tutorial.





Let's assume following:

1. You are moving the leave management system to icehrm, in the middle of the leave period for 2015
2. Some of your employees have leaves carried forwarded from 2014, which might not have been used
3. Your company have annual leave which can be carried forwarded to next year
4. There are casual leave which are accrued 1.5 per each month
5. Some employees have joined in 2015 and their leave entitlement should be proportionate according to joined date

Setting up leave periods

First task is setting up the leave periods. If you are starting from 2015 you only need to have the 2015 leave period. But creating a leave period for 2016 also should not be an issue. Creating a leave period for 2014 will carry forward what ever the remaining leaves from 2014 to 2015. In that case you have to enter all employee leave details for 2014 manually into IceHrm. So the preferred way is to not create the previous leave period by adding all leave carried forwarded by employees using PTO (this will be explained in another section).

Also note that leave period can have different lengths and can be started from any month of the year.

Name	Period Start	Period End	
Year 2015	2015-01-01	2015-12-31	 
Year 2016	2016-01-01	2016-12-31	 

Setting up leave types

1. Lets setup the leave type for annual leave which can be carried forwarded to the next year

Leave Types
Leave Period
Work Week
Holidays
Leave Rules
Paid Time Off
Leave Groups
Employee Leave List

Leave Name*
Annual leave

Leaves Per Leave Period*
14,000

Admin can assign leave to employees*
No

Employees can apply for this leave type*
Yes

Employees can apply beyond the current leave balance*
No

Leave Accrue Enabled*
No

Leave Carried Forward*
Yes

Percentage of Leaves Carried Forward*
100%

Carried Forward Leave Availability Period*
1 Year

Proportionate leaves on Joined Date*
No

Leave Group*
Select

Leave Color*

Cancel
Save

Here I've set leave carried forward to 'Yes' and carry forward percentage to 100% so all the remaining annual leave of this year will be carried forward to the next.

1. Setting up casual leave which are accrued 1.5 per each month and should not be carried forward to the next year

Leave Types

Leave Period

Work Week

Holidays

Leave Rules

Paid Time Off

Leave Groups

Employee Leave List

Leave Name*

Casual leave

Leaves Per Leave Period*

18.000

Admin can assign leave to employees*

Yes

Employees can apply for this leave type*

Yes

Employees can apply beyond the current leave balance*

No

Leave Accrue Enabled*

Yes

Leave Carried Forward*

No

Percentage of Leaves Carried Forward*

Carried Forward Leave Availability Period*

1 Year

Proportionate leaves on Joined Date*

No

Leave Group*

Select

Leave Color*

#16db65

Cancel

Save

I have entered 18 for leave amount, this will accrue 1.5 (18/12) days per month since leave period length for 2015 is 12 months

Employee leave entitlement

Now assume we have an employee named 'Jhon Doe'. His leave entitlement (under "Leave" => "Leave Management"), after above leave periods and leave types are added should look like this:

Leave Type	Available Leaves	Pending Leaves	Approved Leaves	Rejected Leaves	Leaves to be Accrued	Leaves Carried Forward
Annual leave	14	0	0	0	0	0
Casual leave	14.39	0	0	0	3.61	0

There are 14.39 leaves accrued for this year (for the period 2015-01-01 to 2015-10-19). Also it shows the number of day that will be accrued till end of the year from now, which is 3.61 days



Adding leave balance from previous year

The other problem you will face while adopting icehrm leave management is moving leave balance from previous year in a third party leave management system to icehrm. In order to do this you can use PTO. For an example if Jhon Doe has 3 annual leave days remaining from 2014 (but you are not able to automatically move it to 2015 because you have not been using icehrm in 2015), you can add a PTO days as shown below through "Admin"=>"Leave Settings"=>"PTO".

Leave Types	Leave Period	Work Week	Holidays	Leave Rules	Paid Time Off	Leave Groups ▾	Employee Leave List
-------------	--------------	-----------	----------	-------------	---------------	----------------	---------------------

Add New +
Filter ▾

Search

Leave Type	Employee	Leaves Period	Leave Amount	
Annual leave	Jhon Doe	Year 2015	3.000	 

After adding the leave balance you will notice that Jhon Doe has 17 annual leaves instead of 14 in his leave entitlement

Also you may add negative leave balances under PTO for current year to reflect already taken leaves by employees.

Leave Type	Available Leaves	Pending Leaves	Approved Leaves	Rejected Leaves	Leaves to be Accrued	Leaves Carried Forward
Annual leave	17	0	0	0	0	0
Casual leave	14.39	0	0	0	3.61	0

Proportioning leaves respect to joined date

Let's assume Jhon Doe joined the company in May 2015 and should not be allowed to take only a part of leave count defined for 2015. Then for annual leave definition under "Admin"=>"Leave Settings"=>"Leave Types" you can edit Annual Leave and make "Proportionate leaves on Joined Date" = "Yes"

If this is set then Jhon Doe will only be entitled for $18 * (8/12)$ annual leaves for the year given he has joined on 1st of May 2015

Leave Management FAQ

Leave/Paid Time Off Management

How to allocate 160 hours instead of days in leave management module?

When adding leave entitlement you should primarily use leave types. Since you are getting 160 hours a year you can create a leave type called Annual leave and add 20 (160/8) days as leave amount for that leave type. IceHrm assumes a 8 hour work day. So when you do that you can apply for a leave for 1 day or 1 hour. If you apply for a 1 day leave your leave entitlement available leave count will become 19. If you apply for one hour it'll take away 0.125 from your leave entitlement.

How to allocate different amounts of leave to different employees or categories?

Let's say some employees have only 150 hours of paid time off. (For an example all "Marketing Managers"). To implement this you can go to add a leave rule for Marketing Managers for annual leave with leave amount of only 18.75 days (150/8). Leave rules are not bound to any leave period, so the leave rules that you define will be applied to all the leave periods.

How to compensate an employee with Paid time off?

Assume that an employee worked on a holiday due to some urgent issue. You need to compensate him/her with an additional day off. In that case you can use "Paid Time Off" tab to add an additional leave to the employee. Paid time off also used to add leaves carried forwarded from previous years where you have not been using icehrm. If you want to remove some leave from an employee you can add minus PTO also.

I've not been using IceHrm during 2015, But when configuring leave balances for 2016 different employees are having different leave balances carried forwarded from 2015. How to handle this?

You should add these as PTO amounts for leave period 2016 under "Paid Tome Off" tab. You will have to add one record for each employee. This is a one time setup, from 2017 you can use automatic leave carry forwarding.

Implementing a Sample Leave Policy with IceHrm

Introduction

Icehrm has tools to implement complex leave policies. So most of the companies are covered by it. For an example, due to government regulations of some European countries, the leave policies of companies has become a bit too complicated, but still, IceHrm can handle those.

This section describes the process of implementing an advanced leave policy which involves multiple leave groups and rules in multiple countries.

Example Leave Policy

Let's think of a company operating in **Germany** and **Singapore**.

Setup Leave Periods

In IceHrm each Leave day is attached to a Leave Period. So It's important to configure the Leave Periods. Leave Periods are displayed under **Admin => Leave Settings => Leave Periods**

The screenshot shows the 'Leave Periods' tab in the IceHrm administration interface. At the top, there is a navigation bar with tabs: 'Leave Types', 'Leave Period' (selected), 'Work Week', 'Holidays', 'Leave Rules', 'Paid Time Off', 'Leave Groups', and 'Employee Leave List'. Below the navigation bar, there is a blue 'Add New +' button on the left and a search bar on the right. The main content area displays a table with the following columns: 'Name', 'Period Start', and 'Period End'. A single entry is shown: 'Period 2018-01-01 to 2018-12-31' with start and end dates of '2018-01-01' and '2018-12-31' respectively. Below the table, it says 'Showing 1 to 1 of 1 entries'. At the bottom right, there are navigation controls: '← Previous', a blue box with '1', and 'Next →'.

Name	Period Start	Period End
Period 2018-01-01 to 2018-12-31	2018-01-01	2018-12-31

If your company has not been using icehrm before, it is recommended to delete all previous leave periods and keep only the current leave period.

After setting up leave types you can manually add all details about carried forward leave days and already taken leave days using Paid Time off tab under Leave Settings**

Leave Types in Singapore

Singapore company has three leave types.



Annual Leave

Every employee gets 14 days off per year. Remaining leave days can be carried forward indefinitely. For an example, if you were an employee since 2016 and took 10, 13 annual leave days respectively in 2016 and 2017, by 2018 you will have 19 annual leave days. 14 from 2018 and 5 days from previous years.

Creating Leave Type for Annual Leave

1. Login to IceHrm installation as an admin
2. Goto Admin -> Leave Settings
3. If you have created a fresh installation, delete existing leave types
4. Add a new leave type (name it as "Annual Leave")
5. Set *Leaves per Leave Period* to 14
6. Set *Admin can assign leave to employees* to Yes
7. Set *Employees can apply for this leave type* to Yes
8. Set *Leave Carried Forward* to Yes (As you need to carry forward remaining leave to next period)
9. Set *Percentage of Leave Carried Forward* to 100 as you need to carry forward 100% of the remaining leave
10. Set *Maximum Carried Forward Amount* to 0. Setting this to 0 will remove the limitation on carried forward leave days
11. Set *Carried Forward Leave Availability Period* to *No Limit*. This will allow employees to carry forward *Annual Leave* indefinitely
12. Set *Send Notification Emails* to Yes. This will send out emails to approvers when a leave application is submitted
13. Select a *Leave Color*. This will be used to show leave details on leave calendar

Leave Name*	Annual Leave
Leaves Per Leave Period*	14.000
Admin can assign leave to employees*	Yes
Employees can apply for this leave type*	Yes
Employees can apply beyond the current leave balance*	No
Leave Accrue Enabled*	No
Leave Carried Forward*	Yes
Percentage of Leave Carried Forward*	100
Maximum Carried Forward Amount*	0
Carried Forward Leave Availability Period*	No Limit
Proportionate leaves on Joined Date*	Yes
Send Notification Emails*	Yes
Leave Group	Select
Leave Color*	#d9692a

 Cancel  Save

Casual Leave

Each employee gets 7 days per year. Can not be carried forward

Creating Leave Type for Casual Leave

1. Add a new leave type for Casual Leave. The settings can be seen in the screenshot
2. Note that you should set *Leave Carried Forward* to No

Leave Name*	Casual Leave
Leaves Per Leave Period*	7
Admin can assign leave to employees*	Yes
Employees can apply for this leave type*	Yes
Employees can apply beyond the current leave balance*	No
Leave Accrue Enabled*	No
Leave Carried Forward*	No
Percentage of Leave Carried Forward*	0
Maximum Carried Forward Amount*	0
Carried Forward Leave Availability Period*	1 Month
Proportionate leaves on Joined Date*	Yes
Send Notification Emails*	Yes
Leave Group	Select
Leave Color*	#2ea348

Maternity Leave

A working mother can take this leave 4 weeks before expected date of childbirth. Up to 48 leave days can be taken.

Creating Leave Type for Maternity Leave

1. Add a new leave type for Maternity Leave. The settings can be seen in the screenshot
2. For maternity leave, we do not need to enable accrue or carry forward.

Leave Name*	Maternity Leave
Leaves Per Leave Period*	48
Admin can assign leave to employees*	Yes
Employees can apply for this leave type*	Yes
Employees can apply beyond the current leave balance*	No
Leave Accrue Enabled*	No
Leave Carried Forward*	No
Percentage of Leave Carried Forward*	0
Maximum Carried Forward Amount*	0
Carried Forward Leave Availability Period*	1 Month
Proportionate leaves on Joined Date*	No
Send Notification Emails*	Yes
Leave Group	Select
Leave Color*	#701d96

Initial Test for Leave Settings

Adding test employees

For testing, we have added 5 employees.

Employee Number	First Name	Last Name	Mobile Phone	Department	Gender	Supervisor
E002	Jason	Wood	440-953-4578	Branch - Germany	Male	
E001	Nicole	Smith		Branch - Singapore	Female	
E003	Alex	Stewart		Branch - Singapore	Female	
E004	Noah	Schmidt		Branch - Germany	Male	
E005	Johanna	Fischer		Branch - Germany	Female	

Showing 1 to 5 of 5 entries

← Previous 1 Next →

As you can see some employees are based in Singapore and some are based in Germany.











Initial Test for Leave Balances

For testing the leave balance of each of them you can use the *Employee Leave Entitlement* report. Go to *Admin Reports => Reports* to generate it.

Reports

Exports

Search

Name	Details	
 Employee Details Report	This report list all employee details and you can filter employees by department, employment status or job title	
 Active Employee Report	This report list employees who are currently active based on joined date and termination date	
 New Hires Employee Report	This report list employees who are joined between given two dates	
 Terminated Employee Report	This report list employees who are terminated between given two dates	
 Employee Leaves Report	This report list all employee leaves by employee, date range and leave status	
Employee Leave Entitlement	This report list employees leave entitlement for current leave period by department or by employee	
Employee Attendance Report	This report list all employee attendance entries by employee and date range	

Here all the employees are entitled to have all the leave types. Also, the leave numbers are as expected.

Reports

Exports

Download Report

Search

Employee ID	Employee	Leave Type	Pending	Approved	Rejected	Canceled	Available	To be Accrued	Carried Forward from Previous Years
E002	Jason Wood	Annual Leave	0	0	0	0	14	0	0
E002	Jason Wood	Casual Leave	0	0	0	0	7	0	0
E002	Jason Wood	Maternity Leave	0	0	0	0	48	0	0
E001	Nicole Smith	Annual Leave	0	0	0	0	14	0	0
E001	Nicole Smith	Casual Leave	0	0	0	0	7	0	0
E001	Nicole Smith	Maternity Leave	0	0	0	0	48	0	0
E003	Alex Stewart	Annual Leave	0	0	0	0	14	0	0
E003	Alex Stewart	Casual Leave	0	0	0	0	7	0	0
E003	Alex Stewart	Maternity Leave	0	0	0	0	48	0	0
E004	Noah Schmidt	Annual Leave	0	0	0	0	14	0	0
E004	Noah Schmidt	Casual Leave	0	0	0	0	7	0	0
E004	Noah Schmidt	Maternity Leave	0	0	0	0	48	0	0
E005	Johanna Fischer	Annual Leave	0	0	0	0	14	0	0
E005	Johanna Fischer	Casual Leave	0	0	0	0	7	0	0
E005	Johanna Fischer	Maternity Leave	0	0	0	0	48	0	0

Showing 1 to 15 of 15 entries

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Adding Leave Types by Country

As you can see there is a problem with above leave entitlement report. The leave types we have defined are entitled to all the employees, even the ones based in Germany.

In order to, correct the problem, you need to use leave groups. Leave groups is a way to allow only certain employees the ability to apply for certain types of leave.

Defining a Leave Group for Singapore

Define a Leave Group for Singapore under *Admin => Leave Settings => Leave Groups => Edit Leave Groups*


Leave Types Leave Period Work Week Holidays Leave Rules Paid Time Off Leave Groups ▾ Employee Leave List

Name*

Singapore

Details

Employees based in Singapore



Cancel







Save

Then add Singapore employees to this group under *Admin => Leave Settings => Leave Groups => Leave Group Employees*

Leave Types Leave Period Work Week Holidays Leave Rules Paid Time Off Leave Groups ▾ Employee Leave List

Add New + Filter ▾

Search

Employee	Leave Group	
Alex Stewart	Singapore	  
Nicole Smith	Singapore	  

Showing 1 to 2 of 2 entries

← Previous

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Next →

As the next step set *Leave Group* of the *Annual Leave* to *Singapore*

Leave Group

Singapore










Leave Color*

#d9692a

Cancel

Save

Repeat this for other two Leave Types as well.

Leave Types	Leave Period	Work Week	Holidays	Leave Rules	Paid Time Off	Leave Groups ▾	Employee Leave List
<div>Add New + Filter ▾</div> <div>Search</div>							
Leave Name	Leave Accrue Enabled	Leave Carried Forward	Leaves Per Year	Leaves Group			
Annual Leave	No	Yes	14.000	Singapore			
Casual Leave	No	No	7.000	Singapore			
Maternity Leave	No	No	48.000	Singapore			
Showing 1 to 3 of 3 entries							<div>← Previous 1 Next →</div>

Second Test for Leave Balances

Now generate the *Employee Leave Entitlement* report again. Now you will see that only Singapore based employees are entitled for Leave Types we just created.

Reports

Exports

Download Report

Search

Employee ID	Employee	Leave Type	Pending	Approved	Rejected	Canceled	Available	To be Accrued	Carried Forward from Previous Years
E001	Nicole Smith	Annual Leave	0	0	0	0	14	0	0
E001	Nicole Smith	Casual Leave	0	0	0	0	7	0	0
E001	Nicole Smith	Maternity Leave	0	0	0	0	48	0	0
E003	Alex Stewart	Annual Leave	0	0	0	0	14	0	0
E003	Alex Stewart	Casual Leave	0	0	0	0	7	0	0
E003	Alex Stewart	Maternity Leave	0	0	0	0	48	0	0

Showing 1 to 6 of 6 entries

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Allow Maternity Leave only to Working Mothers

We still have a problem with above leave entitlement for Singapore. Only working mothers should be allowed to apply for Maternity Leave. This can be achieved by adding a new *Leave Group*.

1. Add a Leave Group Named "Singapore Working Mothers"

Leave Types

Leave Period

Work Week

Holidays

Leave Rules







Paid Time Off

Leave Groups

Employee Leave List

Add New +

Search

Name	Details	
Singapore	Employees based in Singapore	  
Singapore Working Mothers	Singapore Working Mothers	  

Showing 1 to 2 of 2 entries

← Previous

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Next →

1. Add Nicole Smith to Leave Group "Singapore Working Mothers"

Leave Types

Leave Period

Work Week

Holidays

Leave Rules

Paid Time Off










Leave Groups

Employee Leave List

Add New +

Filter ▼

Search

Employee	Leave Group	
Alex Stewart	Singapore	  
Nicole Smith	Singapore	  
Nicole Smith	Singapore Working Mothers	  

Showing 1 to 3 of 3 entries

← Previous

1

Next →

1. Go to Leave Type tab and change the Leave Group for *Maternity Leave* to "Singapore Working Mothers"

Leave Types

Leave Period

Work Week

Holidays

Leave Rules

Paid Time Off










Leave Groups

Employee Leave List

Add New +

Filter ▼

Search

Leave Name	Leave Accrue Enabled	Leave Carried Forward	Leaves Per Year	Leaves Group	
Annual Leave	No	Yes	14.000	Singapore	  
Casual Leave	No	No	7.000	Singapore	  
Maternity Leave	No	No	48.000	Singapore Working Mothers	  


























Showing 1 to 3 of 3 entries

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1. Under *Employees* => *Employees* switch to *Nicole Smith*. This will let you use the application as *Nicole Smith*

Employees	Skills	Education	Certifications	Languages	Dependents	Emergency Contacts	Documents	Deactivated Employees ▾
Add New +		Filter ▾		Search				
Employee Number	First Name	Last Name	Mobile Phone	Department	Gender	Supervisor		
 E002	Jason	Wood	440-953-4578	Branch - Germany	Male		   	
 E001	Nicole	Smith		Branch - Singapore	Female		   	
 E003	Alex	Stewart		Branch - Singapore	Male		   	
 E004	Noah	Schmidt		Branch - Germany	Male		   	
 E005	Johanna	Fischer		Branch - Germany	Female		   	
Showing 1 to 5 of 5 entries							← Previous	1 Next →

1. Open *Leave* => *Leave Management* => *Leave Entitlement*. This will show all three leave types


All My Leaves	Leave Entitlement	Approved Leave	Pending Leave	Subordinate Leave	Cancellation Requests	Approval Requests
Search						
Leave Type	Available Leaves	Pending Leaves	Approved Leaves	Rejected Leaves	Leaves to be Accrued	Leaves Carried Forward
Annual Leave	14	0	0	0	0	0
Casual Leave	7	0	0	0	0	0
Maternity Leave	48	0	0	0	0	0
Showing 1 to 3 of 3 entries						
← Previous 1 Next →						

Third Test for Leave Balances

Now generate the *Employee Leave Entitlement* report again. Now you will see that Nicole Smith is entitled to Maternity Leave. This is because of *Maternity Leave* is under Leave Group *Singapore Working Mothers* and only *Nicole Smith* is in that Leave Group.

Reports

Exports

Download Report 

Search

Employee ID	Employee	Leave Type	Pending	Approved	Rejected	Canceled	Available	To be Accrued	Carried Forward from Previous Years
E001	Nicole Smith	Annual Leave	0	0	0	0	14	0	0
E001	Nicole Smith	Casual Leave	0	0	0	0	7	0	0
E001	Nicole Smith	Maternity Leave	0	0	0	0	48	0	0
E003	Alex Stewart	Annual Leave	0	0	0	0	14	0	0
E003	Alex Stewart	Casual Leave	0	0	0	0	7	0	0

Showing 1 to 5 of 5 entries

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Next →

Leave Types in Germany

The German company has three leave types.

Vacation

Every employee gets 25 days off per year. Remaining leave days can be carried forward for three months.

If the employee has been working for more than 2 years. They get 1 additional vacation day.

If the employee has been working for more than 3 years. They get another 1 additional vacation day.

If the employee has been working for more than 4 years. They get another 2 additional vacation days.

For an example of your 5th year in the company, you get 29 vacation days.

Creating Leave Type for Vacation

1. Create a Leave Group for Germany

Leave Types

Leave Period

Work Week

Holidays

Leave Rules










Paid Time Off

Leave Groups ▾

Employee Leave List

Add New +

Search

Name	Details	
Singapore	Employees based in Singapore	  
Singapore Working Mothers	Singapore Working Mothers	  
Germany	Employees based in Germany	  

Showing 1 to 3 of 3 entries

← Previous

1

Next →

1. Add all other employees to this Leave Group

Leave Types

Leave Period

Work Week

Holidays

Leave Rules

Paid Time Off



















Leave Groups ▾

Employee Leave List

Add New +

Filter ▾

Search

Employee	Leave Group	
Alex Stewart	Singapore	  
Nicole Smith	Singapore	  
Nicole Smith	Singapore Working Mothers	  
Jason Wood	Germany	  
Johanna Fischer	Germany	  
Noah Schmidt	Germany	  

Showing 1 to 6 of 6 entries


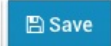
← Previous

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1. Create a Leave Type named Vacation. Set leave carry forward enable and allow carry forward to 3 months. Also, make sure to set the *Leave Group* to **Germany**

Leave Name*	Vacation
Leaves Per Leave Period*	25
Admin can assign leave to employees*	Yes
Employees can apply for this leave type*	Yes
Employees can apply beyond the current leave balance*	No
Leave Accrue Enabled*	No
Leave Carried Forward*	Yes
Percentage of Leave Carried Forward*	100
Maximum Carried Forward Amount*	0
Carried Forward Leave Availability Period*	3 Months
Proportionate leaves on Joined Date*	Yes
Send Notification Emails*	Yes
Leave Group	Germany
Leave Color*	#c98f1d


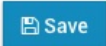
 

Sick Leave

Employees are entitled to Sick Leave given without a limitation. We will set a limit of 14 days per year for **Sick Leave** but allow employees to apply it without a restriction by setting **Employees can apply beyond the current leave balance** to **Yes**.

Creating Leave Type for Sick Leave

Leave Name*	Sick Leave
Leaves Per Leave Period*	14
Admin can assign leave to employees*	Yes
Employees can apply for this leave type*	Yes
Employees can apply beyond the current leave balance*	Yes
Leave Accrue Enabled*	No
Leave Carried Forward*	No
Percentage of Leave Carried Forward*	0
Maximum Carried Forward Amount*	0
Carried Forward Leave Availability Period*	1 Month
Proportionate leaves on Joined Date*	Yes
Send Notification Emails*	Yes
Leave Group	Germany
Leave Color*	#db491b

Forth Test for Leave Balances

Now generate the *Employee Leave Entitlement* report again. Only employees in Germany should be entitled to Vacation and Sick Leave.

Employee ID	Employee	Leave Type	Pending	Approved	Rejected	Canceled	Available	To be Accrued	Carried Forward from Previous Years
E002	Jason Wood	Vacation	0	0	0	0	25	0	0
E002	Jason Wood	Sick Leave	0	0	0	0	14	0	0
E001	Nicole Smith	Annual Leave	0	0	0	0	14	0	0
E001	Nicole Smith	Casual Leave	0	0	0	0	7	0	0
E001	Nicole Smith	Maternity Leave	0	0	0	0	48	0	0
E003	Alex Stewart	Annual Leave	0	0	0	0	14	0	0
E003	Alex Stewart	Casual Leave	0	0	0	0	7	0	0
E004	Noah Schmidt	Vacation	0	0	0	0	25	0	0
E004	Noah Schmidt	Sick Leave	0	0	0	0	14	0	0
E005	Johanna Fischer	Vacation	0	0	0	0	25	0	0
E005	Johanna Fischer	Sick Leave	0	0	0	0	14	0	0

Showing 1 to 11 of 11 entries

[← Previous](#) [1](#) [Next →](#)

But still, we have a problem with Vacation Leave. How to apply different amounts of leave to employees based on years of experience.

This can be implemented using Leave Rules.

Creating Leave Rules for Vacations

Leave rules are a way to alter Leave Types for individual or specific groups of employees. For an example, you can increase the number of leave days only for employees having permanent work contracts by adding a Leave Rule.

Vacation Leave Rule (Employees having 2 Years of Experience)

1. Goto **Admin => Leave Settings => Leave Rules**
2. Create a new Leave Rule for Leave Type **Vacation**. Set the **Required Experience (Days)** to 730 which is 2 years and Number of Leave Days to 27, as we need to give 2 additional leave day to employees who worked more than 2 years. * This Leave Rule will be applied to the employees having more than 730 days between the joined date listed on profile and the start date of the current leave period.

Leave TypesLeave PeriodWork WeekHolidaysLeave RulesPaid Time OffLeave GroupsEmployee Lea

Leave Type*

Germany

Job Title

Select

Employment Status

Select

Employee

Select

Required Experience (Days)*

730

Leaves Per Leave Period*

27

Admin can assign leave to employees*

Yes

Employees can apply for this leave type*

Yes

Employees can apply beyond the current leave balance*

No

Leave Accrue Enabled*

No

Leave Carried Forward*

Yes

Percentage of Leave Carried Forward*

100

Maximum Carried Forward Amount*

0

Carried Forward Leave Availability Period*

3 Months

Proportionate leaves on Joined Date*

Yes

Cancel

Save

1. In order to create the Leave Rule for 3 years, copy the 2-year leave rule and change **Required Experience (Days)** to **1095 (3 Years)** and Number of Leave Days to 28
2. In order to create the Leave Rule for 4 years, copy the 3-year leave rule and change **Required Experience (Days)** to **1460 (4 Years)** and Number of Leave Days to 30

Leave TypesLeave PeriodWork WeekHolidaysLeave RulesPaid Time OffLeave GroupsEmployee Leave List

Add New +Filter

Search

Leave Type	Leave Group	Job Title	Employment Status	Employee	Experience (Days)	Leaves Per Year	
Vacation	Germany				730	27.000	  
Vacation	Germany				1095	28.000	  
Vacation	Germany				1460	30.000	  

Showing 1 to 3 of 3 entries

Previous

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Next

Fifth Test for Leave Balances

Now generate the *Employee Leave Entitlement* report again.

Employee ID	Employee	Leave Type	Pending	Approved	Rejected	Canceled	Available	To be Accrued	Carried Forward from Previous Years
E002	Jason Wood	Vacation	0	0	0	0	30	0	0
E002	Jason Wood	Sick Leave	0	0	0	0	14	0	0
E004	Noah Schmidt	Vacation	0	0	0	0	25	0	0
E004	Noah Schmidt	Sick Leave	0	0	0	0	14	0	0
E005	Johanna Fischer	Vacation	0	0	0	0	27	0	0
E005	Johanna Fischer	Sick Leave	0	0	0	0	14	0	0

- **Jason Wood** has 30 days of Vacation as he joined in Aug 2005
- **Noah Schmidt** has 25 days of vacation. He joined in March 2016. But there is not more than 730 days between joined date and 1st day of the current leave period which is 1st of Jan 2018
- **Johanna Fischer** has 27 leave days as she is eligible for 2-Year vacation leave rule. She joined in May 2015 and there are more than 730 days and less than 1095 days from the joined date to 1st of Jan 2018

Adding Information about previously taken Leave Days

Even though you just configured your company leave policy in IceHrm, your employees might have been applying for leaves even before.

Assume you migrated to IceHrm in March 2018. In this case, you can use Paid time off tab to add already taken leave details for employees. For an example assume **Jason Wood** has already taken 5 Vacation Days off. And **Johanna Fischer** still have 6 Vacation days carried forward from the previous year.

In order to implement this you can add a negative paid time off for Jason Wood positive paid time off for Johanna Fischer.

1. Visit **Admin => Leave Settings => Paid Time off**
2. Add -5 Vacation days for **Jason Wood**

Leave Type*	Vacation
Employee*	Jason Wood
Leave Period*	Period 2018-01-01 to 2018-12-31
Leave Amount*	-5.000
Note	Already taken this year

Cancel Save

1. Add 6 Vacation days for **Johanna Fischer**

Leave Types	Leave Period	Work Week	Holidays	Leave Rules	Paid Time Off	Leave Groups	Employee Leave List
<div>Add New + Filter</div> <div>Search</div>							
Leave Type	Employee	Leaves Period	Leave Amount				
Vacation	Jason Wood	Period 2018-01-01 to 2018-12-31	-5.000				
Vacation	Johanna Fischer	Period 2018-01-01 to 2018-12-31	6.000				
Showing 1 to 2 of 2 entries				← Previous 1 Next →			

Sixth Test for Leave Balances

Now generate the *Employee Leave Entitlement* report again.

Employee ID	Employee	Leave Type	Pending	Approved	Rejected	Canceled	Available	To be Accrued	Carried Forward from Previous Years
E002	Jason Wood	Vacation	0	0	0	0	25	0	0
E002	Jason Wood	Sick Leave	0	0	0	0	14	0	0
E004	Noah Schmidt	Vacation	0	0	0	0	25	0	0
E004	Noah Schmidt	Sick Leave	0	0	0	0	14	0	0
E005	Johanna Fischer	Vacation	0	0	0	0	33	0	0
E005	Johanna Fischer	Sick Leave	0	0	0	0	14	0	0

As you can see **Jason Wood's** Vacation days are reduced from 30 to 25 and **Johanna Fischer's** Vacation days are increased from 27 to 33.

Adding compensated Leave days

Assume **Johanna Fischer** worked 2 additional Saturdays to get your urgent project released. So you can compensate her with two additional Vacation days using Paid time off.

Leave Types	Leave Period	Work Week	Holidays	Leave Rules	Paid Time Off	Leave Groups	Employee Leave List
Add New +		Filter		Search			
Leave Type	Employee	Leaves Period	Leave Amount				
Vacation	Jason Wood	Period 2018-01-01 to 2018-12-31	-5.000				
Vacation	Johanna Fischer	Period 2018-01-01 to 2018-12-31	6.000				
Vacation	Johanna Fischer	Period 2018-01-01 to 2018-12-31	2.000				
Showing 1 to 3 of 3 entries				← Previous 1 Next →			

Making Saturday a Half Day in Singapore

Currently, both offices only work from Monday to Friday. Let's say you want to make Singapore employees work half a day on Saturday also.

1. Visit **Admin => Leave Settings => Work Week**
2. Add a work day for Saturday in Singapore

Day*	Saturday
Status*	Half Day
Country	Singapore
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

Note that this will be applied to employees having Country set to Singapore on there profile.**

Leave Types	Leave Period	Work Week	Holidays	Leave Rules	Paid Time Off	Leave Groups	Employee Leave List
Add New +		Filter					
Day	Status	Country					
Monday	Full Day	For All Countries					
Tuesday	Full Day	For All Countries					
Wednesday	Full Day	For All Countries					
Thursday	Full Day	For All Countries					
Friday	Full Day	For All Countries					
Saturday	Non-working Day	For All Countries					
Sunday	Non-working Day	For All Countries					
Saturday	Half Day	Singapore					

Few Last Notes

1. When an employee applied for a Leave his/her Leave Balance will be updated only when the leave is approved
2. Until the Leave is approved employee has the ability to delete it.
3. After the approval, the employee can cancel the Leave. But the cancellation request will be sent to the supervisor and only after the cancellation request is approved, the leave balance will be updated.
4. Leave days will be carried forward only from Leave Period defined. For an example, if you have leave periods defined for 2017 and 2018, leave days will be carried forward only from 2017 to 2108. Leave days could have been carried forward from 2016 will be ignored.
5. After configuring Leave Types if you are seeing wired numbers as balances first check whether you have previous leave periods defined which are actually not required. When you enable leave carry forwarding and there is a previous leave period defined, current leave period will get leave days carried forward from previous leave period.
6. All the employee leave requests should be approved by the supervisor or an admin. An admin can approve any leave request.

Leave Requests and Approval

This section explains the process of an employee applying for a Leave and supervisors, approvers or admins approving or rejecting the leave request.


Applying for Leave

Any employee can apply for a leave via **Leave => Leave Management** menu

The screenshot shows the 'Leave Management' interface in the ICE Hrm system. On the left is a sidebar menu with options: Home, Personal Information, Leave (expanded), Time Management, Documents, Company, Training, Travel Management, Finance, and User Reports. The 'Leave' menu is expanded, showing 'Leave Management' and 'Leave Calendar'. The main content area is titled 'Leave Management' and includes a sub-header 'Leave'. Below this are tabs: 'All My Leaves' (selected), 'Leave Entitlement', 'Approved Leave', 'Pending Leave', 'Subordinate Leave', and 'Cancellation Requests'. The 'All My Leaves' tab displays a form for applying for leave. The form fields are: 'Leave Type*' (Vacation), 'Leave Start Date*' (2018-04-23), 'Leave End Date*' (2018-04-25), 'Reason' (Just going for a vacation), and 'Attachment' (Upload, Remove). At the bottom of the form are 'Continue' and 'Cancel' buttons.

When applying for a leave, the employee can select the period to apply for the leave and then in the next step they can select what type of leave they want to apply (full-day / half-day or partial)

Home


Johanna Fischer
 Logged In

Personal Information

Leave

Leave Management

Leave Calendar

Time Management

Documents

Company

Training

Travel Management

Finance

User Reports

ICE Hrm

Leave Management

Leave

All My Leaves

Leave Entitlement

Approved Leave

Pending Leave

Subordinate I

Leave Summary

Approved Leave Count (0)

Pending Leave Count (0)

Available Leave Count (35)

Leave Dates

Leave Date	Leave Type
Apr 23, 2018 (Monday)	3 Hours - Afternoon
Apr 24, 2018 (Tuesday)	Full Day
Apr 25, 2018 (Wednesday)	Half Day - Morning

Leave Notes

Apply

Back

When the leave application is submitted, the employee and the supervisor of the employee will receive email notifications



Dear Johanna Fischer,

Your leave application has been submitted for review.
You will be informed once it is approved or rejected.

This email sent through <https://icehrm.com/app/demoleave/>

You are receiving this email because you are added as a user to <https://icehrm.com/app/demoleave/>. If you are not the intended recipient please inform application admin team+jason@web-stalk.com.



Dear Noah,

Your Direct Subordinate Johanna Fischer, has submitted a leave application.
Please login and take necessary actions.

IceHrm Application Url: <https://icehrm.com/app/demoleave/>

This email sent through <https://icehrm.com/app/demoleave/>

You are receiving this email because you are added as a user to <https://icehrm.com/app/demoleave/>. If you are not the intended recipient please inform application admin team+jason@web-stalk.com.

The supervisor of the employee can view leave request via **Leave => Leave Management => Subordinate Leave** tab (Indirect supervisors also will be able to see/approve leave requests if the setting "Leave: Allow Indirect Admins to Approve" is set to "1")

The screenshot shows the ICE HRM web application interface. The user is logged in as Noah Schmidt. The left sidebar contains navigation links: Home, Admin, Employees, Admin Reports, Insights, Recruitment, Personal Information, and Leave. The main content area is titled 'Leave Management' and includes a sub-tab 'Subordinate Leave'. A filter bar shows 'Status = Pending | Leave Period = Period 2018-01-01 to 2018-12-31'. Below the filter is a table with the following data:

Employee	Leave Type	Leave Start Date	Leave End Date	Status
Johanna Fischer	Vacation	2018-04-23	2018-04-25	Pending

Below the table, it says 'Showing 1 to 1 of 1 entries'. There are also 'Previous' and 'Next' navigation buttons.

The supervisor can view leave request details and then approve or reject the request

Leave Days

Number of Leaves available (33.125)

Number of Leaves requested (1.875)

Reason for Applying leave:
Just going for a vacation

Leave Date	Leave Type
Apr 23, 2018 (Monday)	3 Hours - Afternoon
Apr 24, 2018 (Tuesday)	Full Day
Apr 25, 2018 (Wednesday)	Half Day - Morning

Ok

Change Leave Status

Leave Status
Approved

Status Change Note
Approved, have a nice vacation!

Change Leave Status

Not Now

When the leave request is approved or rejected, an email is sent to the employee with the result



Dear Johanna Fischer,

The status of the leave you've applied for the period 2018-04-23 to 2018-04-25,
has been changed to **Approved**.

This email sent through <https://icehrm.com/app/demoleave/>

You are receiving this email because you are added as a user to <https://icehrm.com/app/demoleave/>. If you are not the intended recipient please inform application admin team+jason@web-stalk.com.

Leave entitlement of the employee is updated accordingly. Amount of leave days is 1.875 because it has a full day (1), half-day (0.5) and a three-hour leave (3/8). $1 + 0.5 + 3/8 = 1.875$

Home

ICE Hrm

Johanna

Johanna Fischer

Logged In

- Personal Information
- Leave
 - Leave Management
 - Leave Calendar
- Time Management
- Documents
- Company
- Training

Leave Management

Leave

All My Leaves | **Leave Entitlement** | Approved Leave | Pending Leave | Subordinate Leave | Cancellation Requests | Approval Requests

Search

Leave Type	Available Leaves	Pending Leaves	Approved Leaves	Rejected Leaves	Leaves to be Accrued	Leaves Carried Forward
Vacation	33.125	0	1.875	0	0	0
Sick Leave	14	0	0	0	0	0

Showing 1 to 2 of 2 entries

Previous 1 Next

Canceling Leave Requests

1. If a leave request is not approved, it can be just cancelled by the employee
2. For approved leave requests, the employee needs to send a cancellation request (via Leave Management, Approved Leave tab). This cancellation request will be sent to the supervisor and only when the supervisor approve the cancellation request the employee's leave entitlement will be updated



















Manage Leave Requests as an Admin

An admin has access to all the employee leave requests via **Admin => Leave Settings => Employee Leave List** . The filter button can be used to filter leave requests from older leave periods also. Admin has the right to approve/reject any leave request

Leave TypesLeave PeriodWork WeekHolidaysLeave RulesPaid Time OffLeave GroupsEmployee Leave List

Filter

Search

Employee	Leave Type	Leave Start Date	Leave End Date	Status	
Sofia O'Sullivan	Annual leave	2017-12-13	2017-12-13	Approved	  
Sofia O'Sullivan	Annual leave	2017-12-14	2017-12-14	Pending	  
Sofia O'Sullivan	Annual leave	2017-12-15	2017-12-15	Pending	  
Sofia O'Sullivan	Annual leave	2017-12-16	2017-12-16	Pending	  
Sofia O'Sullivan	Annual leave	2017-12-17	2017-12-17	Pending	  
Sofia O'Sullivan	Annual leave	2017-12-18	2017-12-18	Pending	  

Recruitment

Recruitment module can be used to:

- Post jobs
- Let candidates apply for these jobs
- Schedule interviews
- Track candidate progress with notes
- Share job links with linkedIn, facebook, twitter and google+ directly from icehrm

Recruitment Setup

Recruitment setup menu is available under "Recruitment"=>"Recruitment Setup". Here you can add/edit Employment Types, Experience levels, Job Functions, Education Levels and Benefits. All these information will be used when posting a job.

The screenshot displays the 'Recruitment Setup' page in the ICE Hrm system. The left sidebar contains a navigation menu with 'Recruitment' expanded, showing 'Recruitment Setup' as the selected option. The main area has a header 'Recruitment Setup' with a sub-header 'Recruitment'. Below this are five tabs: 'Edit Employment Types', 'Edit Experience Levels', 'Edit Job Functions', 'Edit Education Levels', and 'Edit Benefits'. The 'Edit Employment Types' tab is active, showing a table with the following entries:

Name
Full-time
Part-time
Contract
Temporary
Other

Below the table, it says 'Showing 1 to 5 of 5 entries'. There is also an 'Add New +' button above the table.

Posting a Job

Jobs can be posted via "Recruitment"=>"Job Positions". Following table will list out main fields used to create job postings

Fields	Description
Job Code	A unique code to identify the job position. Url for applying the job position will contain this code.
Job Title	The job title
Short Description	A short description about the job position. This will be displayed when listing company jobs. The public url for companies open positions is, http://icehrm_url/entry.php?g=admin&n=candidates
Description	Full description of the job position
Show Salary	Whether you want to show the salary range for this job position
Keywords	Keywords for improving search and SEO
Status	Only active jobs will get listed
Image	Attach an image if you want to show an image with job listing
















Job Position - Display Type

You should select a display type when posting a job position. This section details the for display types supported by icehrm

Fields	Description
Text Only	Only text will be displayed e.g: Text ad
Image Only	Only an image will be displayed. The image for the ad should be provided in Image field when creating job position e.g: Image only ad
Image and Full Text	Use this display type when you want to show an image for the job position with a full description and details such as salary, requirements and benefits.
Image and Other Details	Use this display type when you want to show an image for the job position only with a minimum set of meta data about the job position such as salary, employment type, experience, job functions and closing date.

Sharing your job position on social media and using direct links

You can share created job positions on Google+, Facebook, Twitter and LinkedIn directly from IceHrm using social links on job positions module. Also you can get a direct link to the job position which you can send via email or any other media by clicking on "Job Link" icon.

Job Code	Job Title	Details	Country	Department	Job Link
JC001	Software Engineer	More than 375,000 users world-wide rely on our software for their daily business as it makes creating graphical presentations so much easier, faster and more enjoyable. Among our customers are many renowned consulting companies and large international corporations.	United States	Head Office	    
JC002	QA Senior Test Automation Engineer	As a QA Senior Test Automation Engineer at Rocket you will help us launch the most successful startup companies around the world.	Germany	Marketing Department	    
J0003	Online Editor	Online Editors required for a reputed news agency	Malaysia		    

Showing 1 to 3 of 3 entries

← Previous 1 Next →

Candidates


- Store candidate details
- Receive job applications from candidates via job postings
- Schedule interviews
- Track candidate progress with notes

After creating a job position you can list all the candidates who have applied for the job position via "Recruitment"=>"Candidates" module. It should list all the candidates who have applied for your jobs.

Candidates Recruitment

Candidates

Application



Jhon Doe

+1 455565656 icehrm+jhon@web-stalk.com

Edit

View CV

Apply For a Job

Schedule an Interview

Add a Note

Job Applications

Software Engineer JC001

Nov 13, 2015 - 11:01 AM

Interviews

Software Engineer JC001

First Interview

Nov 20, 2015 - 11:02 AM

Status: Accepted

Notes

Software Engineer JC001

Nov 13, 2015 - 11:04 AM

First interview rescheduled

Software Engineer JC001

Nov 13, 2015 - 11:03 AM

This candidate can be considered for a QA position also

Here you can schedule interviews and add notes related to the candidate. Notes could be a details about a telephone conversation or candidates expectations.

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Document Management

In IceHrm you can manage company documents as well as individual employee documents.

Company Documents

Company documents can be added via **Employees => Document Management** . Depending on the confidentiality and nature of the document it can be shared only with individual employees, all employees attached to a department or all the employees in the company.










Company Documents

Document Types

Employee Documents

Add New +

Search

Name	Details	Status	
Applicant Appraisal Form Evaluation Template		Active	  
New Hire Processing		Active	  
Financial Report		Active	  

Showing 1 to 3 of 3 entries

← Previous

1

Next →

Company Documents

Document Types

Employee Documents

Name*

Applicant Appraisal Form Evaluation Template

Details

Status*

Active

Attachment

attachment_hfDIHhU44aPN5r1524188470397

Download

Upload

Remove

Share Departments*

✕ Branch - Germany

Share Employees*

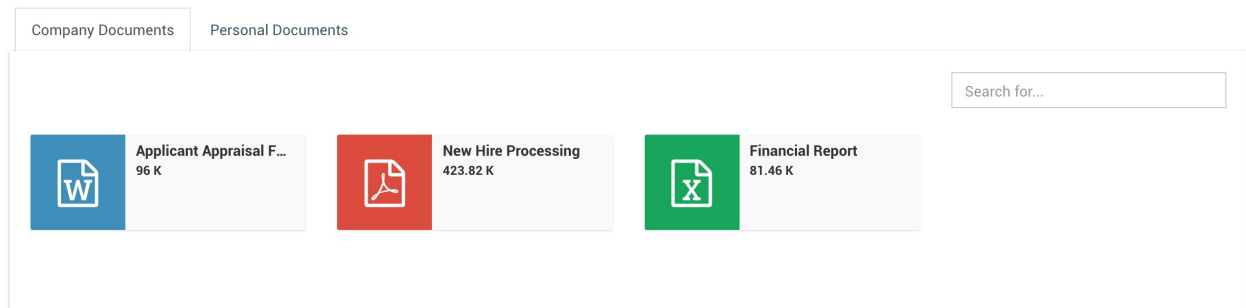
✕ Johanna Fischer

✕ Nicole Smith

⌛ Cancel

Save

Employees can view company documents via **Documents => My Documents => Company Documents**



Employee Personal Documents

Document Types

Accessed via `Employees => Document Management => Document Types`

Document Types tab is used to define various documents relevant to your organization. The employees are able to upload documents under these categories.

Expire Notifications

When defining document types you can define before how many days icehrm should notify the user about the expiring documents.

The notification cron should be setup for this feature to function properly. Please check the section [Cron for Notifications] (<https://thilinah.gitbooks.io/icehrm-guide/content/installation-and-setup.html>)

Employee Documents

Administrators and Managers can use "Employee Documents" tab to explore and manage documents uploaded by employees or add new documents to employees.

Settings

Set "Notifications: Send Document Expiry Emails" to No if you don't wish to receive document expiry notifications.

Also set `Notifications: Copy Document Expiry Emails to Manager` to Yes if you want to send all document expiry notifications to respective managers also

Setting Up Training Module

Training module in IceHrm can be used to manage process of providing internal trainings for employees.

In training module we have courses, training sessions and training subscription management.

1. Admins/Managers can define courses
2. Admins/Managers can use courses to create training sessions
3. Admin can assign courses to employees or employees can subscribe
4. Employees can mark training sessions as attended and attach a proof of completion if required
5. Admins/Managers can approve that the training session is completed by the employee

Adding a new Course

Field	Description
Code	Each course should have a code
Name	The course name
Coordinator	The employee of the company who is responsible for coordinating the course. In some cases coordinator could be the trainer/instructor as well
Trainer	Name of the person who conduct the course
Payment Type	Whether the course is sponsored by the company or paid by the employee

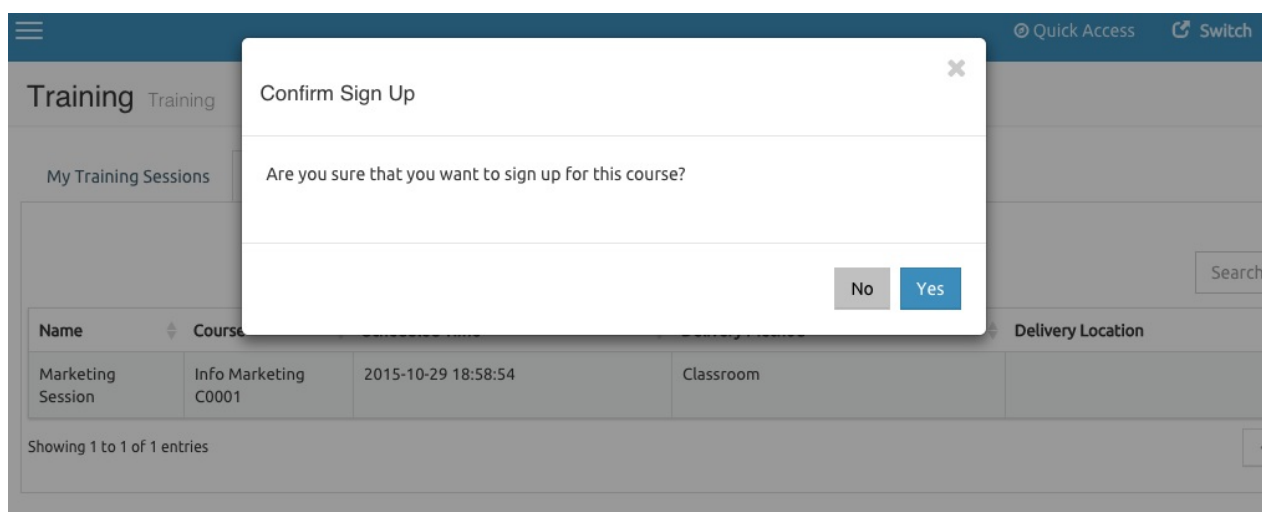
Most of the other fields are self descriptive

Adding a new Training Session

Field	Description
Name	Name of the training session
Course	Select the trainign course
Scheduled Time	When this training session is scheduled
Assignment Due Date	If the training session has an associated assignment, the due date for that
Delivery Method	Whether the training session is delivered in a class room, online or its a sel study session
Attendance Type	- Assign = Only admins/mangers can assign the session to employees - Sign Up = Session is open for employees to sign up
Attachment	An attachment with other resources for the session
Training Certificate Required	If Yes, employees have to attach a proof of completion (such as certificate) before marking the training session as completed

Subscribing to a Training Session

1. An employee can subscribe to a training session via Training => Training module.
2. Go to "All Training Sessions" tab
3. Click on subscribe button



Attendance Type

Employees can only subscribe to training sessions having Attendance Type set to "Sign Up"

Completing a Training Session

Once an employee participated in a training session he/she can mark the training as completed via `Training=>Training=>My Training Sessions` tab. Once this is done a notification will be sent to the supervisor to approve the training session.

Proof of Completion

If the training session requires a proof of completion, employee has to edit the training session under "My Training Sessions" tab and attach a proof of completion before submitting it for approval

Approving a Training Session

Once an employee mark a training session as completed, the supervisor will receive a notification to approve it.

The screenshot displays the 'Training' module interface. At the top, there is a blue header bar with a menu icon, 'Quick Access', and a user profile 'Lala'. Below the header, the 'Training' section is active, showing three tabs: 'My Training Sessions', 'All Training Sessions', and 'Training Sessions of Direct Reports'. The 'My Training Sessions' tab is selected, displaying a table with one entry for 'Sofia O'Sullivan' in a 'Marketing Session'. A notification panel on the right indicates 'You have no new notifications' and shows a message from 'Training Module' stating that Sofia O'Sullivan changed the status of the training session to 'attended', requesting approval. The bottom of the table shows 'Showing 1 to 1 of 1 entries'.

Employee	Training Session
Sofia O'Sullivan	Marketing Session

Showing 1 to 1 of 1 entries

If all the things are in order, the supervisor can approve the training session via `Training=>Training=>Training Sessions of Direct Reports` tab

Expenses

Configuring Expenses Module

Expense categories and payment methods can be configured under `Employees -> Expense Administration` . Also Managers can view and approve or reject subordinate expenses under the same module.

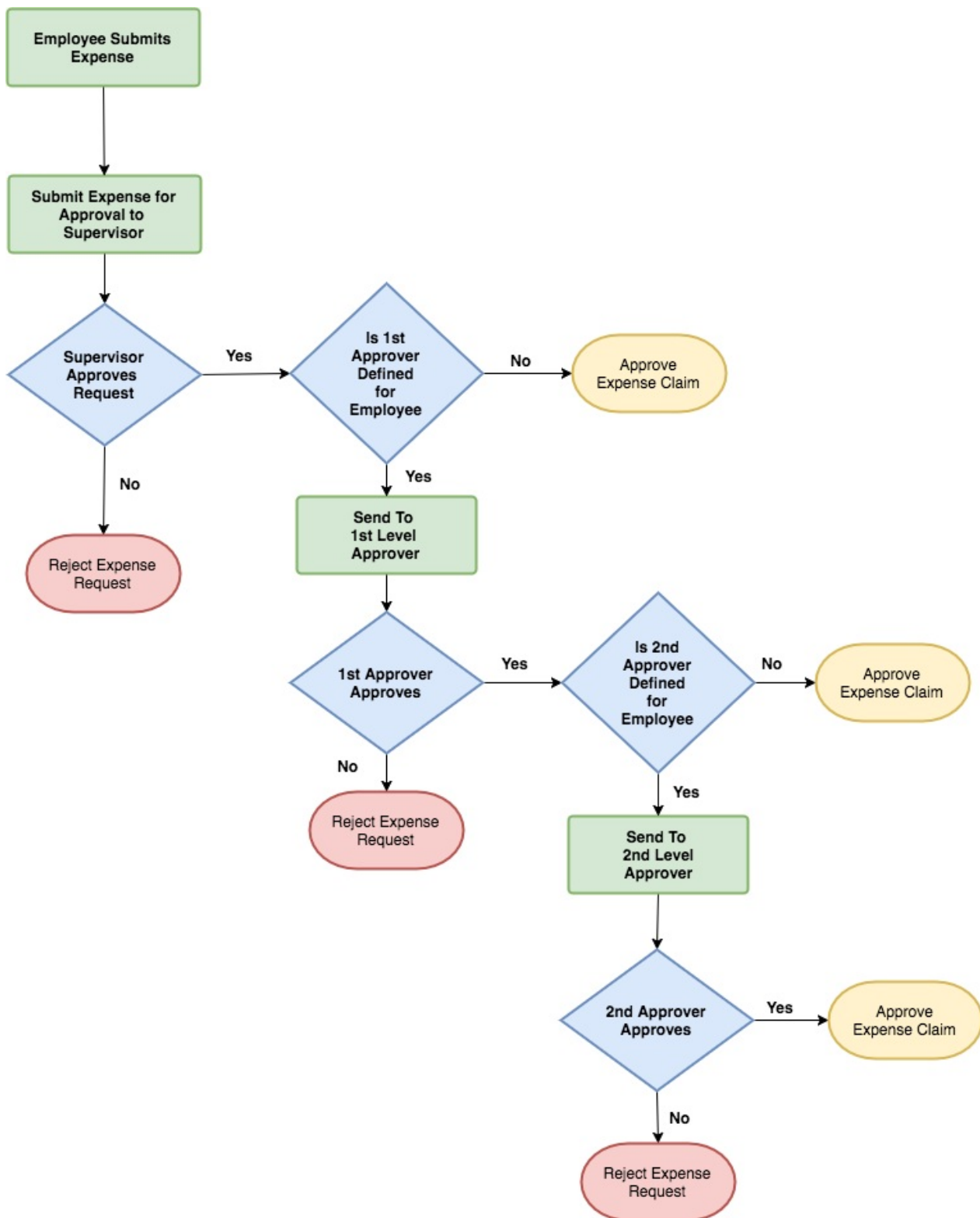
Admins can view and edit expenses from all employees.

Adding Expenses

Employees can add expenses under `Finance -> Expenses` .

Approval Process

You can define 1st, 2nd and 3rd level approvers for employees (while editing an employee). These approvers and employee's direct supervisor will be involved in approval process of most of the entities added by employees.



Pre-Approving Expenses

If the Setting `Expense: Pre-Approve Expenses` is set to Yes, all new expenses will be approved automatically

Reporting

Expense report can be downloaded under `Admin -> Reports` by specifying a date range.

Payroll Management

Payroll Module Usage






















You may use IceHrm to achieve following tasks:

- Store employee salary details with and group into salary components
- Calculate various deductions
- Include overtime payments into employee salary slips depending on number of hours
- Add salary components based on attendance sheets
- Allow employees to download payslips in PDF format










Understanding Employee Salary and Salary Components

When paying salary to your employees you can have it divided into several components. When you create a new installation of IceHrm we pre-define some Salary components and group these salary components accordingly for your convenience.

If required you can add more. (You may view/edit Salary Components under menu **Payroll => Salary**)

Name	Salary Component Type	Details	
Basic Salary	Basic		  
Fixed Allowance	Basic		  
Car Allowance	Allowance		  
Telephone Allowance	Allowance		  
Regular Hourly Pay	Hourly		  
Overtime Hourly Pay	Hourly		  
Double Time Hourly Pay	Hourly		  

Salary Component Types

Code	Name	
B001	Basic	  
B002	Allowance	  
B003	Hourly	  

Also in order to make it more easy to define taxes and other deductions on salary components we group these into Salary Component Types

Defining Salary for Your Employees

You can add salary information for your employees under **Payroll => Salary => Employee Salary Components** tab.

Salary Component Types
Salary Components
Employee Salary Components

Employee*

IceHrm Employee

Salary Component*

Basic Salary

Amount*










4200

Details

Monthly basic salary

Cancel
Save

This way you can define other salary components like allowances and hourly pay details.

Employee	Salary Component	Amount	Details	
IceHrm Employee	Basic Salary	4200.00	Monthly basic salary	  
IceHrm Employee	Car Allowance	300.00		  
IceHrm Employee	Regular Hourly Pay	35.00		  

Creating Company Payroll










Company payroll is available under Payroll => Payroll menu. We have already added information for calculating payroll for Sri Lanka and Ghana. You can delete all these before starting to work on your payroll. But sometimes these data can come handy as an example for building your payroll.

Adding a Calculation Group For Germany

First we should start with adding a **Calculation Group**. Go to Calculation Group Menu under Payroll and add a new calculation group. As an example we will be using Germany.

Company Payroll
Payroll Reports
Payroll Columns
Calculation Groups
Calculation Methods
Payslip Templates

Add New +

Name	Details	
Sri Lanka Payroll Calculation		  
Ghana Payroll Calculation		  
Germany Payroll Calculation		  

Adding Payroll Columns

One of the best ways to decide which columns you need have in your payroll report is to think of rows in your employees payslip. Payroll report as a table which holds all your individual employee payslips in each row.

Since you have three salary components Basic, Car Allowance and Hourly pay we can define following payroll columns. (For now let's assume tax is 19% on total salary).

Now here are the list of columns to show on payroll:

1. Basic Salary
2. Car Allowance
3. Hours Worked During Month
4. Hourly Pay
5. Payment For Hours Worked
6. Gross monthly salary
7. Deduction for Tax
8. Net Salary

So now we can start adding payroll columns. It's a good idea to prefix your payroll columns with its respective country code to make it easier to find.

Adding Payroll Column for Basic Salary

Now you can go to the tab "Payroll Columns" and click on "Add".

Company Payroll	Payroll Reports	Payroll Columns	Calculation Groups	Calculation Methods	Payslip Templates
-----------------	-----------------	-----------------	--------------------	---------------------	-------------------

Name*	DE - Basic Salary
Predefined Calculations	None
Salary Components*	✕ Basic Salary
Calculation Method*	
Columns to Add*	
Columns to Subtract*	
Column Order*	1
Editable*	No
Enabled*	Yes
Default Value*	0.00
Calculation Columns	Add Reset
Function	

⌂ Cancel 💾 Save



As this column only depends on Basic Salary component you can just select the that salary component from the list. (Note that in some cases you can add multiple salary components to same column).

Also make sure you set the **enable to Yes** and **default value to 0.00**.

The **column order should be 1** because it should be the first column in your payroll report for Germany.

Adding Payroll Column for Car Allowance



Adding: Hours Worked During Month Column

There are employees who do not have a fixed salary but paid on hourly basis. Easiest way to handle these employees is to first create a column to get number of hours worked for the month using attendance. In order to do that you can use pre-defined calculations.

Company Payroll

Payroll Reports

Payroll Columns

Calculation Groups

Calculation Methods

Payslip Templates

Name*

DE - Hours Worked per Month

Predefined Calculations

Total Hours from Attendance

Salary Components*

Calculation Method*

Columns to Add*

Columns to Subtract*

Column Order*

3

Editable*

No

Enabled*

Yes

Default Value*

0

Calculation Columns

Add

Reset

Function

Cancel

Save

Adding: Hourly Pay Column

We can take hourly pay from salary component and create this column as below:

Company Payroll

Payroll Reports

Payroll Columns

Calculation Groups

Calculation Methods

Payslip Templates

Name*	DE - Hourly Pay
Predefined Calculations	None
Salary Components*	* Regular Hourly Pay
Calculation Method*	
Columns to Add*	
Columns to Subtract*	
Column Order*	4
Editable*	No
Enabled*	Yes
Default Value*	0.00
Calculation Columns	<button>Add</button> <button>Reset</button>
Function	

Cancel Save

Adding: Payment For Hours Worked Column

Based on the previous column you have added, now you can create the hourly pay based column as shown below:

First create a new payroll column

Company Payroll	Payroll Reports	Payroll Columns	Calculation Groups	Calculation Methods	Payslip Templates
-----------------	-----------------	-----------------	--------------------	---------------------	-------------------

Name*

DE - Payment for Hours Worked

Predefined Calculations

None

Salary Components*

Calculation Method*

Columns to Add*

Columns to Subtract*

Column Order*

5

Editable*

No

Enabled*

Yes

Default Value*

0.00

Calculation Columns

Add

Reset

Then, Client on "Add" button next to Calculation Columns

Here you are adding the previously defined **hours per month column as a parameter named X** and **hourly pay column as parameter Y**, so you can use it to do various calculations using these columns

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Editable*	<input type="text" value="No"/>
Enabled*	<input type="text" value="Yes"/>
Default Value*	<input type="text"/>
Calculation Columns	<div><div>Add</div><div>Reset</div></div> <div><div>Variable:X</div><div>Variable:Y</div></div>
Function	<input type="text" value="X * Y"/>
<div><div>Cancel</div><div>Save</div></div>	

Adding Gross Monthly Salary Column

Total monthly gross salary should be the sum of basic salary, car allowance and payment for total hours worked. This column can be created as shown below:

Name*	<input type="text" value="DE - Gross Salary"/>
Predefined Calculations	<input type="text" value="None"/>
Salary Components*	<input type="text"/>
Calculation Method*	<input type="text"/>
Columns to Add*	<div><div>× DE - Basic Salary</div><div>× DE - Car Allowance</div><div>× DE - Payment for Hours Worked</div></div>
Columns to Subtract*	<input type="text"/>
Column Order*	<input type="text" value="6"/>
Editable*	<input type="text" value="No"/>
Enabled*	<input type="text" value="Yes"/>
Default Value*	<input type="text" value="0.00"/>
Calculation Columns	<div><div>Add</div><div>Reset</div></div>
Function	<input type="text"/>
<div><div>Cancel</div><div>Save</div></div>	

Creating Calculation Method to Calculate 19% Tax

As you have seen you can do some calculations at column level. But things such as tax which are having different percentages and multiple slabs it's better to use calculation methods. Now you should go to **Calculation Methods** tab and add a new calculation method.

Company Payroll

Payroll Reports

Payroll Columns

Calculation Groups

Calculation Methods

Payslip Templates

Name*

DE - Tax

Salary Component Type*

Salary Component*

Payroll Report Column

DE - Gross Salary

Calculation Process

Add

Reset

Calculation Group

Germany Payroll Calculation

Cancel

Save

You can create a calculation method based on a Salary component group (type), a Salary component or an Existing payroll column. In this case we use an existing payroll column.

Now click on add button on Calculation Process filed to define the actual calculation.

According to our example for the full range of gross salary tax is 19%. So we don't need to define any ranges and can calculate the tax as follows.

Lower Limit Condition*

No Lower Limit

Lower Limit*

0

Upper Limit Condition*

No Upper Limit

Upper Limit*

0

Value*

X * 0.19

+ Done

Now we need to create a payroll column and add this calculation method to that column.

Company Payroll

Payroll Reports

Payroll Columns

Calculation Groups

Calculation Methods

Payslip Templates

Name*

DE - Tax

Predefined Calculations

None

Salary Components*

Calculation Method*

× DE - Tax

Columns to Add*

Columns to Subtract*

Column Order*

7

Editable*

No

Enabled*

Yes

Default Value*

0.00

Calculation Columns

Add

Reset

Function

Cancel

Save

Please also pay attention how we are assigning **column order** to each column.

Add "Net Salary" column

























Net Salary is Gross salary minus tax. So we create Net Salary column as shown below:

Name*	DE - Net Salary
Predefined Calculations	None
Salary Components*	
Calculation Method*	
Columns to Add*	✕ DE - Gross Salary
Columns to Subtract*	✕ DE - Tax
Column Order*	8
Editable*	No
Enabled*	Yes
Default Value*	0.00
Calculation Columns	<input type="button" value="Add"/> <input type="button" value="Reset"/>
Function	

Now we have finished defining payroll columns. When you go to Payroll columns and search "DE - " you can see all the fields in German payroll.

Add New +

DE -

Name	Column Order	Calculation Method	Editable	Enabled	
DE - Basic Salary	1		No	Yes	  
DE - Car Allowance	2		No	Yes	  
DE - Hours Worked per Month	3	AttendanceUtil_getTimeWorkedHours	No	Yes	  
DE - Hourly Pay	4		No	Yes	  
DE - Payment for Hours Worked	5		No	Yes	  
DE - Gross Salary	6		No	Yes	  
DE - Tax	7		No	Yes	  
DE - Net Salary	8		No	Yes	  

Showing 1 to 15 of 38 entries

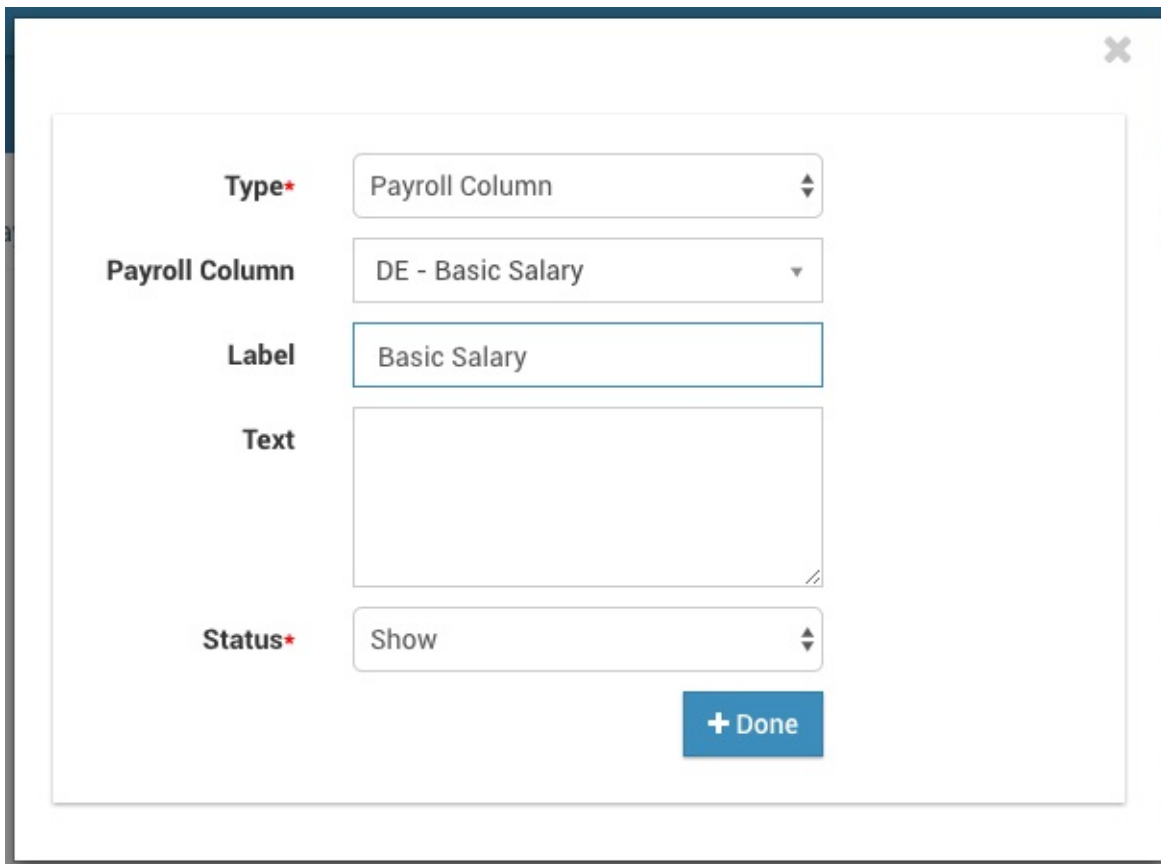
← Previous
 1
2
3
 Next →

Create Payslip Template

As you have all the required payroll columns you can use these to create a payslip template. So we are going to create a new payslip template named German Payslip Template and add all the columns defined above. Goto Payslip Templates tab and create a new payslip.

A payslip template has can be created by adding following items:

1. Company Logo
2. Company Name
3. Text (For adding special messages to notifications to employees)
4. Separators (For separating sections on payslip)
5. Payroll columns



The screenshot shows a modal dialog box for adding a payroll column. It contains the following fields and controls:

- Type***: A dropdown menu with 'Payroll Column' selected.
- Payroll Column**: A dropdown menu with 'DE - Basic Salary' selected.
- Label**: A text input field containing 'Basic Salary'.
- Text**: A large, empty text area for additional details.
- Status***: A dropdown menu with 'Show' selected.
- + Done**: A blue button to confirm the addition.

Name*

German Payslip Template

Payslip Fields

Add

Reset

Company Logo

Company Name

Separators

Payroll Column Basic Salary

Payroll Column Car Allowance

Payroll Column Payment for Hours Worked

Separators

Payroll Column Gross Pay

Payroll Column Tax 19%

Separators

Payroll Column Net Pay

⌂ Cancel

💾 Save

Create Payroll Report

Payroll Report is the unit used to combine all the payroll columns and calculate monthly payments for all the selected employees.

.Goto Payroll Reports tab and create a new Payroll Report.

Company Payroll	Payroll Reports	Payroll Columns	Calculation Groups	Calculation Methods	Payslip Templates
-----------------	-----------------	-----------------	--------------------	---------------------	-------------------

Name*	Germany Payroll Calculation
Pay Frequency*	Monthly
Calculation Group*	Germany Payroll Calculation
Payslip Template*	German Payslip Template
Department*	Your Company
Start Date*	2017-08-01
End Date*	2017-08-31
Payroll Columns*	<div>× DE - Basic Salary × DE - Car Allowance × DE - Gross Salary × DE - Hourly Pay × DE - Hours Worked per Month × DE - Net Salary × DE - Payment for Hours Worked × DE - Tax</div>
Status*	Draft

CancelSave

When you create the payroll report it should be in **Draft** state. Only when it is processing completed it should go to **Completed** state.

Also you need to select all the payroll columns you defined earlier for german payroll here as shown above.

Selecting Employees For Your Payroll Report

Above payroll is for monthly paid employees who are in German Payroll Calculation group. So you need to add some employees satisfying above requirements under "**Company Payroll**" tab.

Company Payroll
Payroll Reports
Payroll Columns
Calculation Groups
Calculation Methods
Payslip Templates

Employee*
IceHrm Employee

Pay Frequency*
Monthly

Currency*
EUR

Calculation Group
Germany Payroll Calculation

Calculation Exemptions

Calculations Assigned







Cancel
Save

As shown below we have added two employees to German payroll

Company Payroll
Payroll Reports
Payroll Columns
Calculation Groups
Calculation Methods
Payslip Templates

Add New +
Filter ▼

Search

Employee	Pay Frequency	Calculation Group	Currency	
IceHrm Employee	Monthly	Germany Payroll Calculation	EUR	  
Lala Lamees	Monthly	Germany Payroll Calculation	EUR	  

Showing 1 to 2 of 2 entries
Previous
1
Next










Configure Employee Salary Components

Since the payroll depends on employee salary components you should make sure all employee salary components are defined properly. You can do this by going to **Payroll -> Salary** module and selecting **Employee Salary** tab.

Salary Component Types
Salary Components
Employee Salary Components

Add New +
Filter ▼

Search

Employee	Salary Component	Amount	Details	
IceHrm Employee	Basic Salary	4500.00		  
IceHrm Employee	Car Allowance	450.00		  
Lala Lamees	Regular Hourly Pay	85.00		  

Showing 1 to 3 of 3 entries
Previous
1
Next

As you can see here **IceHrm Employee** is getting a Basic and Allowance while **Lala Lamees** getting paid per hour. As we have configured our payroll report application now able to calculate the tax and other payroll columns properly.

Processing Payroll Report

Click on the blue color "Process" button on your payroll report under Payroll Report tab. This will show salaries of all the employees in your payroll.

Name	Pay Frequency	Department	Date Start	Date End	Status	
Sri Lanka Payroll Sample	Monthly	Your Company	2016-03-01	2016-03-31	Draft	
Ghana Payroll Sample	Monthly	Your Company	2016-08-01	2016-08-31	Draft	
Germany Payroll Calculation	Monthly	Your Company	2017-08-01	2017-08-31	Draft	

Showing 1 to 3 of 3 entries

[← Previous](#)
[1](#)
[Next →](#)

[Company Payroll](#)
[Payroll Reports](#)
[Payroll Columns](#)
[Calculation Groups](#)
[Calculation Methods](#)
[Payslip Templates](#)

	DE - Basic Salary	DE - Car Allowance	DE - Hours Worked per Month	DE - Hourly Pay	DE - Payment for Hours Worked	DE - Gross Salary	DE - Tax	DE - Net Salary
IceHrm Employee	4500.00	450.00	182.76	0.00	0.00	4950.00	940.50	4009.50
Lala Lamees	0.00	0.00	82.69	85.00	7028.65	7028.65	1335.44	5693.21

Showing 1 to 2 of 2 entries

[← Previous](#)
[1](#)
[Next →](#)

[Cancel](#)
[Save](#)
[Download](#)
[Finalize](#)

As you can see here IceHrm can now calculate your payroll.

After checking figures manually you can click on finalize button which will change the payroll report status to **Completed**.

Downloading Payslips

Now your employee can login and download payslip for the payroll period 2017-08-01 to 2017-08-31.

Login as the employee and goto **User Reports -> Reports** module.

[Reports](#)

Name	Details
Download Payslips	Download your payslips

And then download the Payslip from any completed payroll report

Download Payslips

Select Payroll*

Germany Payroll Calculation

Download

Cancel

Payslip for IceHrm Employee will look like this:



Sample Company Pvt Ltd

Basic Salary	4500.00
Car Allowance	450.00
Payment for Hours Worked	0.00
<hr/>	
Gross Pay	4950.00
Tax 19%	940.50
<hr/>	
Net Pay	4009.50

Generating Payroll for Next Month

Once you configure your payroll for initially, generating it for the second month can be done in few minutes.

Clone a previous Payroll Report using Copy button

Company Payroll

Payroll Reports

Payroll Columns

Calculation Groups

Calculation Methods

Payslip Templates

Add New +

Search

Name	Pay Frequency	Department	Date Start	Date End	Status	
Sri Lanka Payroll Sample	Monthly	Your Company	2016-03-01	2016-03-31	Draft	<div><div></div><div></div><div></div><div></div></div>
Ghana Payroll Sample	Monthly	Your Company	2016-08-01	2016-08-31	Draft	<div><div></div><div></div><div>Copy</div><div></div></div>
Germany Payroll Calculation	Monthly	Your Company	2017-08-01	2017-08-31	Completed	<div><div></div><div></div><div></div><div></div></div>

Showing 1 to 3 of 3 entries

← Previous

1

Next →

Change Dates and set status to Draft

Name*	Germany Payroll Calculation 
Pay Frequency*	Monthly 
Calculation Group*	Germany Payroll Calculation 
Payslip Template*	German Payslip Template 
Department*	Your Company 
Start Date*	 2017-09-01
End Date*	 2017-09-30
Payroll Columns*	<div><div> DE - Basic Salary</div><div> DE - Car Allowance</div><div> DE - Gross Salary</div><div> DE - Hourly Pay</div><div> DE - Hours Worked per Month</div><div> DE - Net Salary</div><div> DE - Payment for Hours Worked</div><div> DE - Tax</div></div>
Status*	Draft 

 Cancel  Save

Then save the new Payroll Report and process and finalize it.

Import and Export Payroll Data

Pre-defined Payrolls

IceHrm team has already created few sample payrolls which you can import and use to generate or study the payroll creation process.

Download Payroll Files

- [Sample Payroll Setup](#)
- [Sri Lanka Payroll Setup](#)
- [Ghana Payroll Setup](#)

Import Payrolls

- Goto System -> Data module
- Select "Data Import Files" Tab
- Press Add New button

Data System

Data Importers | **Data Import Files**

Name* Sample Country Payroll - 20171101

Data Import Definitions* Payroll Data Import

File to Import* file_O3Y2REXKJlpW8d1512373541423 Download Upload

Remove

Last Export Result

Cancel Save

- Give a meaningful name and select "Payroll Data Import" as Data Import Definitions.
- Select the file you downloaded using above links
- Save
- From the list client on "Process" button

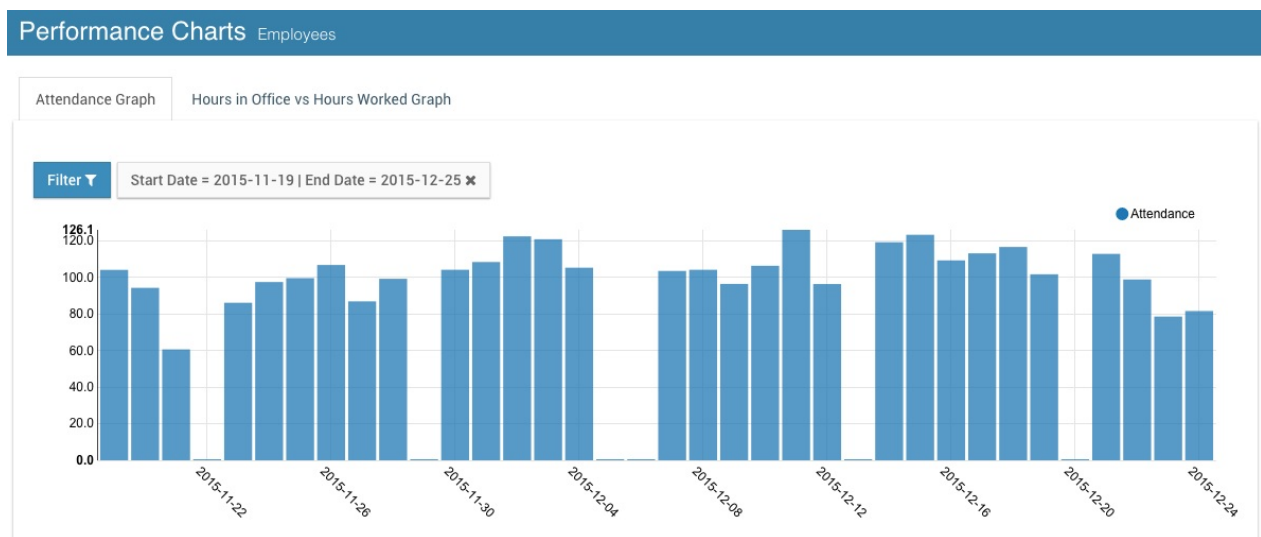
Payroll	Data Import Definitions	Status	Process
Sample Country Payroll - 20171101	Payroll Data Import	Not Processed	

Insights

Attendance Monitoring charts are very useful when you when to get a quick abstract look at how all the employees or a specific employee attend to their work. It shows how much time they spend time in the office against how much time they actually putting into time sheets.

Attendance Graph

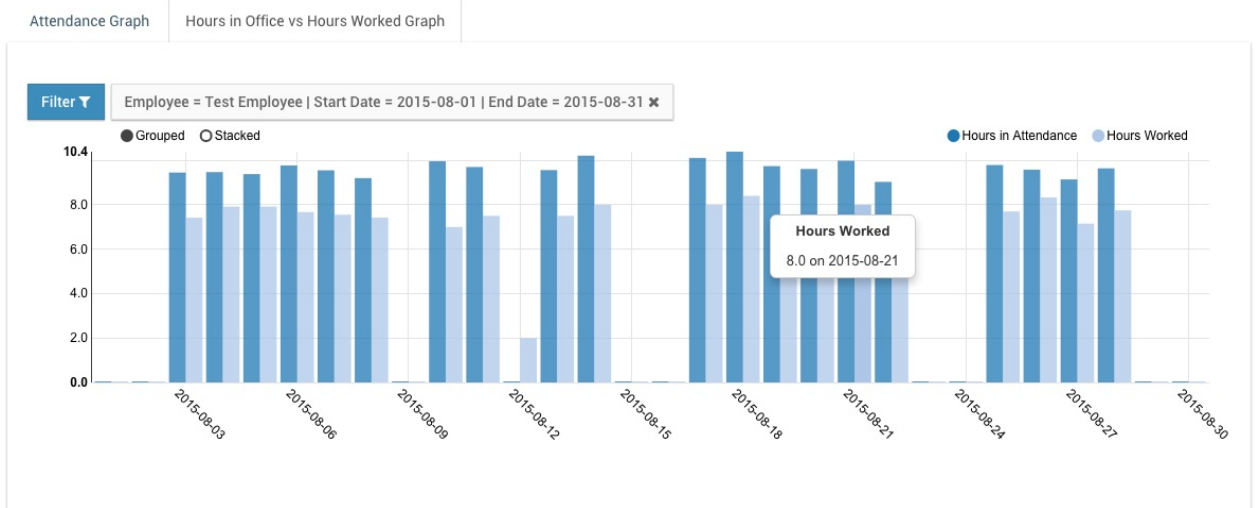
Here you can check attendance time recorded every day for all the employees or a specific employee.



Attendance vs Time sheets Graph

In this chart admins/mangers can see how much of a percentage of attendance time goes into time sheets for each employee.

Performance Charts Employees


















Reporting

Admin Reports

(Admin Reports -> Reports)












IceHrm saves all the generated reports under report files section for future references. Admins are entitled to generate following reports.

Name	Details
 Employee Details Report	This report list all employee details and you can filter employees by department, employment status or job title
 Active Employee Report	This report list employees who are currently active based on joined date and termination date
 New Hires Employee Report	This report list employees who are joined between given two dates
 Terminated Employee Report	This report list employees who are terminated between given two dates
 Employee Leave Entitlement	This report list employees leave entitlement for current leave period by department or by employee
 Employee Leaves Report	This report list all employee leaves by employee, date range and leave status
 Employee Attendance Report	This report list all employee attendance entries by employee and date range
 Employee Time Tracking Report	This report list employee working hours and attendance details for each day for a given period
 Employee Time Sheet Report	This report list all employee time sheets by employee and date range
 Overtime Report	This report list all employee attendance entries by employee with overtime calculations
 Overtime Summary Report	This report list all employee attendance entries by employee with overtime calculation summary
 Employee Time Entry Report	View employee time entries by date range and project
 Overtime Request Report	This report list employee overtime requests by employee, date range, overtime category and project
 Travel Request Report	This report list employees travel requests for a specified period
 Expense Report	This report list employees expenses for a specified period

User Reports

(User Reports -> Reports)

Following reports can be downloaded by employees

Name		Details
	Download Payslips	Download your payslips
	Leaves Report	This report list your leave applications, date range and leave status
	Time Entry Report	View your time entries by date range and project
	Attendance Report	View your attendance entries by date range
	Time Tracking Report	View your working hours and attendance details for each day for a given period
	Time Sheet Report	This report list all employee time sheets by employee and date range
	Overtime Report	This report list all employee attendance entries by employee with overtime calculations
	Overtime Summary Report	This report list all employee attendance entries by employee with overtime calculation summary
	Client Project Time Report	View your time entries for projects under a given client
	Travel Request Report	View travel requests for a specified period
	Expense Report	View expenses for a specified period

IceHrm REST Api

Currently icehrm expose employee details and attendance data via the REST api.

Full Api Documentation can be found here: <https://icehrm.docs.apiary.io/#>

Setting up IceHrm Open Source and Pro REST Api

Please refer <http://icehrm.github.io/docs/setup-rest-api/> for instuctions on setting up rest api with Nginx.

For apache web server we have already included a .htaccess file under icehrm/app/api

Using REST Api with Open Source and IceHrmPro

Your api url base will be "<http://your-icehrm-url.com/icehrm-pro-dev/app/api>".

If you want to call employees/me, you should send a request to "<http://your-icehrm-url.com/icehrm-pro-dev/app/api/employees/me>".

Using REST Api with Cloud installations

First you should enable REST api via Settings -> Other -> Enable REST Api setting.

IceHrm uses OAuth 2.0 bearer authentication. So you have to send the bearer token with every request. Each icehrm user can find their auth token by opening Basic Information -> Personal Information -> Api Access (tab).

Basic Information Personal Information

[My Details](#)[Company](#)[Api Access](#)

Api Access Token

RRRRRRRR6fdeb20bb04b2c23DDDDD

Making First Api call - Cloud

If your icehrm instance name is test1 (<https://test1.icehrm.com>), your Api url will be

- <https://icehrm.com/api/test1>

Then according to <https://icehrm.docs.apiary.io/#> you can view own data by sending a GET request to

- <https://icehrm.com/api/test1/employees/me>

You can use following request by changing api url and auth token

```
curl -i https://icehrm.com/api/test1/employees/me \  
-H "Authorization: Bearer RRRRRRRR6fdeb20bb04b2c23DDDDD"
```

For creating a employee you can use

```
curl -X POST -H "Authorization: Bearer 9RRRRRRRR6fdeb20bb04b2c23DDDDD" -H "Content-Type: application/json" -d '{
  "employee_id": "D101",
  "first_name": "IceHrm 123",
  "middle_name": "Sample Ex1",
  "last_name": "Employee",
  "nationality": "35",
  "birthday": "1984-03-17",
  "gender": "Male",
  "marital_status": "Married",
  "ssn_num": "",
  "nic_num": "294-38-3535",
  "other_id": "294-38-3535",
  "driving_license": "",
  "employment_status": "3",
  "job_title": "11",
  "pay_grade": "2",
  "work_station_id": "",
  "address1": "2772 Flynn Street",
  "address2": "Willoughby",
  "city": "Willoughby",
  "country": "US",
  "province": "41",
  "postal_code": "44094",
  "home_phone": "440-953-4578",
  "mobile_phone": "440-953-4578",
  "work_phone": "440-953-4578",
  "work_email": "icehrm+admin@web-stalk.com",
  "private_email": "icehrm+admin@web-stalk.com",
  "joined_date": "2005-08-03",
  "confirmation_date": "0000-00-00",
  "supervisor": "1",
  "indirect_supervisors": "[\"3\", \"4\"]",
  "department": "1",
  "termination_date": "0000-00-00",
  "status": "Active",
  "approver1": "5",
  "approver2": "6",
  "approver3": "7"
}' "https://icehrm.com/api/test1/employees"
```

LDAP Settings

This section describe the process of configuring LDAP with IceHrm

php-ldap

PHP5 LDAP extension should be installed for LDAP to work. Also make sure all required outbound ports are opened

Before using please install php-ldap module.

For PHP 5.3 `$> sudo apt-get install php5-ldap`

For PHP 7.0 `$> sudo apt-get install php-ldap`

For using php ldap on windows please [refer](#)

No LDAP for user with username "admin"

The user "admin" will always login with local db username and password (even LDAP is enabled)

Use these config to test LDAP connection with following test LDAP server

<http://www.forumsys.com/tutorials/integration-how-to/ldap/online-ldap-test-server/>

Change configs as follows under System->Settings

Setting	Description
LDAP: Enabled	Yes
LDAP: Server	ldap.forumsys.com
LDAP: Port	389
LDAP: Root DN	dc=example,dc=com
LDAP: Manager DN	cn=read-only-admin,dc=example,dc=com
LDAP: Manager Password	password
LDAP: Version 3	Yes
LDAP: User Filter	uid={}

Then create a user with username "riemann" under System->Users

Logout and try login with riemann/password

Issue with LDAP

If you are facing login issues after enabling LDAP, you can still login as user "admin" and disable LDAP

Frequently Asked Questions

Leave Management

How to add a leave type only visible to limited number of employees

- Create a leave group (Admin -> Leave Settings -> Leave Groups -> Edit Leave Groups)
- Add all the employees that should see the leave type to above group (Admin -> Leave Settings -> Leave Groups -> Leave Group Employees)
- Create a leave type and set its leave group to newly created leave group
- Only the employees in step (2) will be able to see and apply for this leave type