

BLUE CHAMELEON : Human Resource Manager

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December 19, 2013

7.11 Human Resource Manager (HRM)

Blue Chameleon's Agenda, as previously seen (7.2), offered a client-dedicated organization of your company's working force. Now, employees also have their own timetable-related plans, rights and duties that should be taken care of ; that is why Blue Chameleon's is equipped with a Human Resource Manager that allows to :

- manage employees along their working schedule (regular weeks, on weekends...) and work contract (permanent, temporary...) ;
- as an employee, plan holidays, modify them... in a quantitative way ;
- manage employees' requested holidays in a chain-of-command manner ;
- see at a glance, through the Planning, what each user or user groups are up to, sick leave, work or holidays.

The HRM functionalities are accessed via the eponymous submenu element in the

Add-ons

command group.

7.11.1 HRM setup guide

This guideline has to be followed before using HRM and, after that, each time a new user is in.

1. set up HRM user rights (7.11.2) ;
2. define workweek profiles (7.11.4.1) ;
3. configure employees (7.11.4.3) : to each user, assign a workweek profile as well as entry/outgo dates so that her/his Planning is filled by default.

7.11.2 Rights related to the Human Resource Manager

They are ruled at the *Modify User Page* (9.17) for instance as illustrated on Fig.7.105.

For this user :

[*Menu script user rights* :]

- HRM : rules the access to the HRM add-on

The other rights as displayed under [*HR Management*] rule the management (reading, creating, modifying and deleting) of HRM's components. They might be for 'Owner' (the right is limited to user herself/himself), 'Group' (the right is extended to all users in user's default user group) 'All' (user can apply it to any other user) :

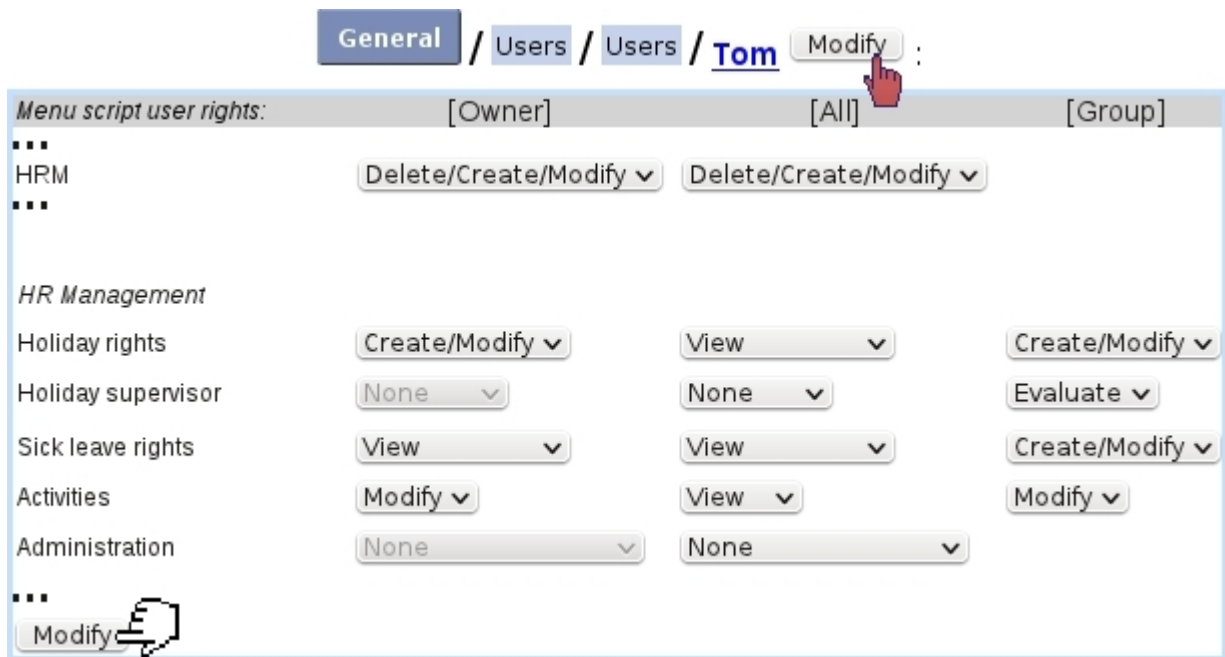



Figure 7.105: The user rights that rule Human Resource Manager ; **these values are ideal for a non-manager user that is a head of group** (he can indeed plan holidays, sick leaves and activities for users belonging to his group).

- Holiday rights ('Owner', 'Group', 'All') : are related to user's ability to her/his own (and others') holiday. Values are :
 - None : no access to holiday planning ;
 - View : the holiday planning can only be viewed ;
 - Create/Modify : user can add (7.11.5.2) and modify (7.11.5.4) holidays for herself/himself (in addition, her/his group or all users) and also cancel requests (7.11.5.4.2) for unconfirmed holidays ;
 - Credit/Debit : user can credit and debit holidays (7.11.5.9) ;
 - Review : user can review holidays requests (7.11.5.7). With this particular right, user can also modify and cancel holidays that have already been confirmed.
- Holiday supervisor ('Group', 'All') : gives user the right to give an opinion on a holiday request (7.11.5.8) ;
- Sick leave rights ('Owner', 'Group', 'All') : are related to user's ability to sick leaves (7.11.9). Values are :
 - None : user cannot see her/his own or others' sick leaves ;
 - View : user's own sick leaves or others' can be seen on the planning ;
 - Create/Modify : user can add and modify sick leaves for herself/himself ('Owner') and others ('Group', 'All').

- Activities ('Owner', 'Group', 'All') : user can modify activities, on the planning (7.11.10) for herself/himself or other users ; this also grants the right to overtime management (7.11.6) and on-planning week/day type change (7.11.7).
- Planning administration ('All') :
 - None : the 'Administration' button, at the bottom of the *Main Planning Page*, does not even show ;
 - Workweek profiles : user can define and delete (7.11.4.1) ;
 - Yearly management : user can default-fill planning for any year (7.11.4.5).


7.11.3 Planning view

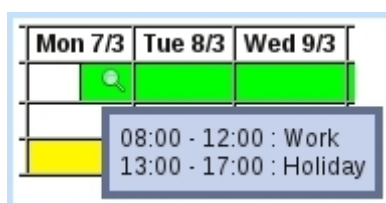
As featured on Fig.7.106, the planning is accessed via **HRM**. The following display options are featured :

- search menus to aim on a particular user group and/or user, as well as ('User status') according to their Blue Chameleon access (9.4.3) status : enabled, disabled or any of those ;
- browsing calendars , allowing to then **Display** the planning from and to any date ;
- a checkbox enabling to show holidays that have not been validated yet.

Upon display, thanks to click-links, the planning can also be browsed in a weekly or monthly way. User names are also clickable, showing user's information (7.11.3.1).

On the planning grid, a cell which is fully colored means that this event lasts for the user's whole day (therefore, with a duration equal to user's *Daily Work Duration*, as weekly set on the *Staff Workdays Page*, 7.11.4.4), otherwise the number of hours that the event lasts is shown in a proportional way to the cell's width.

Hovering mouse cursor over a cell shows a  icon, which mouseover shows in a small window the detailed planning contents of the day :



Color codes for cells (or cell parts), as well as the effect of clicking on them, are as follows :

Planning

User group : User : User status :

From 7/3/2011 to 13/3/2011 - Show pending holidays

Planning group Sales Department, 7 March 2011 - 13 March 2011 :

<< February <	User	Mon 7/3	Tue 8/3	Wed 9/3	Thu 10/3	Fri 11/3	Sat 12/3	Sun 13/3	> April >>
	HANSON Thomas ...								
	MALONE Richard ...				Biz trip	Biz trip			
	ROBBS Harry ...								

Print model :

Figure 7.106: The *Main Planning Page*, showing the planning of all users (with an *enabled* access) in "Sales Department" user group.


Color	Meaning	Click (*)
white	work	Manage Day pop-up (7.11.3.2)
red	no work	<i>Add/Modify Workday Page</i> (7.11.6)
green	confirmed holidays	<i>View Holidays Page</i> (7.11.5.3), (<i>Modify Holidays Page</i> (7.11.5.4) if 'Review' rights)
orange	pending holidays	<i>Modify Holidays Page</i> (7.11.5.4)
yellow	sick leave	<i>Modify Planning Page</i> (7.11.9.1)

(*) *provided that related user rights are sufficient.*

As it can be seen on the illustration, a white planning cell may contain a small text, corresponding to an activity (7.11.10) set for that user that day.

Below the planning grid, as many as four buttons may be available, according to user's rights (7.11.2) :

- , leading to the eponymous page as detailed at 7.11.5.1 ;
- , leading to the *View Activities Page* (7.11.10) ;
- , allowing to access the *Manage Users' Holidays Page* (7.11.5.6) ; this button only appears if "Holiday rights" are at least set to 'Debit/Credit' ;
- , allowing to access the *Planning Administration Page* (7.11.4) ; this button only appears if "Administration rights" are at least set to 'Workweek profiles'.

At the very bottom of *Main Planning Page*, a button is available to  as a formatted PDF document the current view of the planning (limited to one week), according to a print model (13.2).



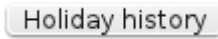
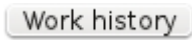
It is to note that, in order to not clutter the display, only users who had been assessed a workweek profile (7.11.4.4) appear here.

7.11.3.1 The User Information pop-up



Figure 7.107: The User Information pop-up.

On the *Main Planning Page*, clicking on a user's name shows the pop-up as featured in Fig.7.107, where the following is available :

- the user's general information (names, user groups, phone numbers,...) as it was filled on the *Modify User Page* (9.17) ;
- a button allowing to view user's  (7.11.5.5) ;
- a button allowing to view user's  (7.11.8) ;
- same possibility as above for user's sick leave (7.11.9) history.

The clickable "..." right next to a user name leads to a page where a detailed planning (similar as the one featured at Fig.7.125) for this user can be seen.

7.11.3.2 The Manage Day pop-up

On the Planning view, whenever a cell (or part thereof) is white, clicking on it brings (if at least one of the two elements proposed in the menu is allowed by rights) the Manage Day pop-up as featured on Fig.7.11.3.2. According to the user's rights (7.11.2), and depending how current user is related to the clicked cell's user, these elements may or may not appear :

- the clicked day's activities (7.11.10) can be changed ; for this to appear, user has to be configured activity-wise (7.11.4.4) and the user right for 'Activity' has to be high enough for 'Owner', 'Group' or 'All', depending on the clicked user ; it is to note that as many activity choices appear as user's day is configured work-wise (for instance, work from 8-12, nothing from 12 to 1PM and work again from 1PM to 5PM : yields two activity choices) ;
- the daily planning/weekly planning corresponding related to this day can be changed (7.11.4.2/7.11.7) ; this also relies on the 'Activities' user right ;
- an event can be added :
 - new holidays (7.11.5.2), relying on the eponymous user right ;
 - overtime or undertime (7.11.6), relying on the 'Activities' user right ;
 - sick leave (7.11.9), relying on the eponymous user right.



Figure 7.108: The Manage Day pop-up for user Tom.

The **More...** buttons as seen in this pop-up allow to configure more precisely or broadly :

- for Activity, it brings the pop-up as seen in Fig.7.139, where the activities for the week (or the month) can be set ;
- for Daily planning, it brings up similar detailed schedule menus as in Fig.7.134 allowing to define a more complicated schedule ;
- for Weekly planning, it leads the same page as in Fig.7.115, where weekly profiles can be set for the whole year.

For holidays or sick leaves, on the subsequent page, a range of dates for the new event will be proposed, starting and ending by default on the clicked date. For overtime, a configuration page the day is brought up.

7.11.4 Planning Administration

Configuring the planning user-wise is done from the *Planning Administration Page* as illustrated on Fig.7.109, accessible only if "Administration" user rights (7.11.2) are sufficient, i.e. at least set to 'Workweek profiles'.

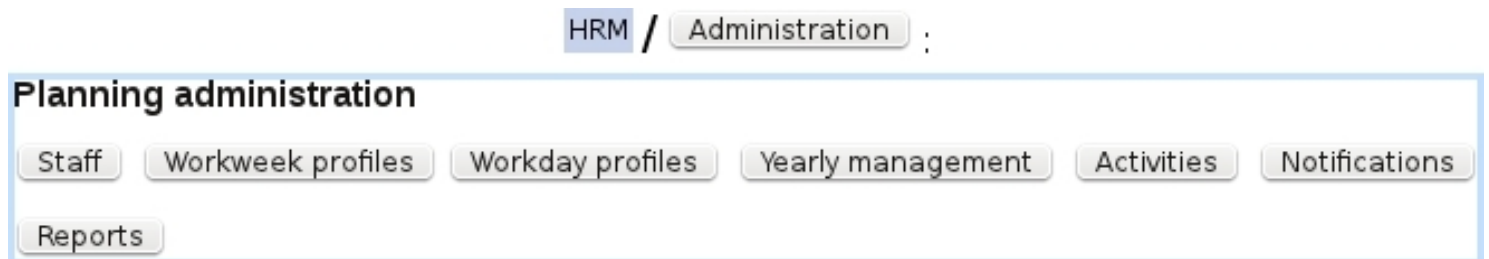


Figure 7.109: The *Planning Administration Page*.

On this page :

- **Staff** leads to the *Manage Staff Page* (7.11.4.3), where employees are configured (entry/exit dates, workweek profiles) ;
- **Workweek profiles** leads to the page as described next where workweek profiles are created ;
- **Yearly management** leads to the page where the yearly filling of planning (7.11.4.5) is taken care of ;
- **Activities** leads to the page where activities are configured (7.11.4.6) ;
- **Notifications** leads to the page where notifications are set up (7.11.4.7) ;
- **Reports** leads to a page where time-wise reports upon employees' sick leaves, holidays... can be printed out (7.11.4.8).

When first using HRM, defining workweek profiles and configuring employees as described next must be done in order.

7.11.4.1 Defining workweek profiles

Inside a company, employees might not share the same weekly schedule and total worked hours ; that is why Blue Chameleon enables to define workweek profiles, describing for each day of the week which hours are worked and which are not.

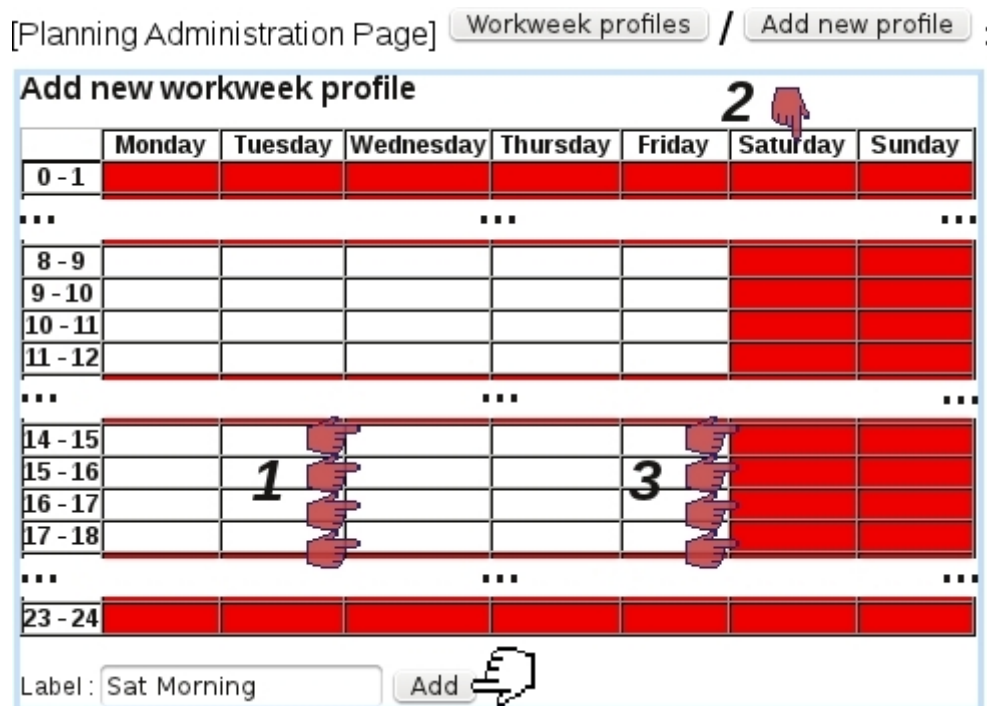


Figure 7.110: Creating a workweek profile with a Wednesday afternoon off and a worked Saturday morning. First, the four hours of Wednesday afternoon are clicked to be declared as un-worked ; then, **Saturday** is clicked to be declared as worked and finally the four hours of Saturday afternoon (now in white) are clicked to be declared as un-worked.

Defining such profiles is achieved from the *Planning Administration Page*, via the [Workweek profiles](#) / [Add new profile](#) . A general weekly schedule, as featured on Fig.7.110 is then displayed.

There :

- clicking on a particular cell declares this hour either worked or un-worked ;
- clicking on a day's name makes it either fully un-worked or worked similarly as the other days ;
- clicking on a hourly range (for instance **8-9**) declares it either worked or un-worked for all worked days of the week.

The default workweek profile is defined from Monday to Friday, from 8 to 12 and from 14 to 18.

View workweek profile

Label : Sat Morning

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
0 - 1							
...							
8 - 9							
9 - 10							
10 - 11							
11 - 12							
...							
14 - 15							
15 - 16							
16 - 17							
17 - 18							
...							
23 - 24							

Figure 7.111: Viewing the workweek profile as previously created.

Any profile can then be seen (as illustrated as a result on Fig.7.111) via [Workweek profiles](#), as well as modified (in a similar way as defined) and removed.

7.11.4.2 Defining workday profiles

Workday profiles can be designed to be used whenever a specific day's planning has to be modified ; they then appear in a specific menu (as seen for instance at Fig.7.134 or at the Manage Day Popup, 7.11.3.2) and allow thus to load in a single click a day's profile.

They are defined from the *Planning Administration Page*, through [Add new day profile](#) ; on subsequent popup, as featured at Fig.7.112, hourly ranges are defined by clicking on the 🕒 icons for start and end and are [Add](#)'ed. The day profile is then created.

Afterwards, workday profiles can be modified and deleted (provided that they are not already used in the planning).

7.11.4.3 The *Manage Staff Page*

As illustrated in Fig.7.113, this page features, for users (as usual searchable by user groups, access status (9.4.3) and user type (9.17)) :

- her/his **current** workweek profile (7.11.4.1), as assessed as described at 7.11.4.4.1 ;
- her/his allowed holiday overdraft i.e. the number of vacation days that can be taken eventhough user has none remaining (provided of course they will be compensated for in the future) ;

[Planning Administration Page] Workday profiles / Add new day profile :

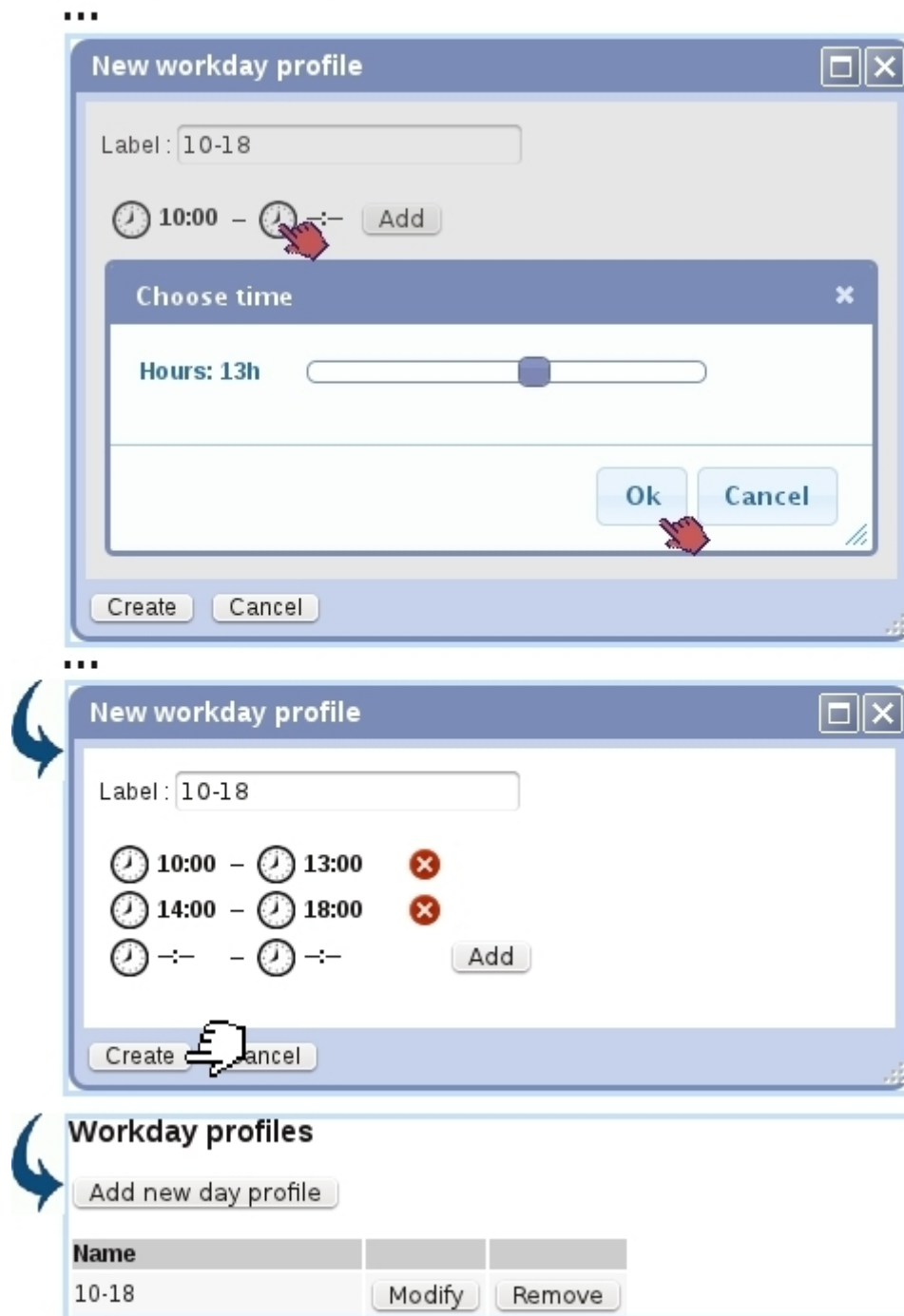


Figure 7.112: Creating a workday profile, defining a day worked from 10AM to 1PM and 2PM to 6PM.

- their entry and exit dates in the company ; users can be filtered entry and exit date-wise thanks to four calendars at the page ;
- buttons allowing to **View** and **Modify** this particular user.

Staff


User group : User : User status : User type :

Entry : from to · exit : from to

User	Current workweek profile	Default workweek profile	Holiday overdraft	Entry	Exit	
HANSON Thomas	Regular	<None>	2	02/01/2004	-	<input type="button" value="View"/> <input type="button" value="Modify"/>
MALONE Richard	Regular	<None>	2	04/12/2005	-	<input type="button" value="View"/> <input type="button" value="Modify"/>
ROBBS Harry	Sat Morning	<None>	2	02/10/2006	31/12/2012	<input type="button" value="View"/> <input type="button" value="Modify"/>

Figure 7.113: The *Manage Staff Page*, offering extensive data on Blue Chameleon users relating to the Planning.

The latter button leads to a page where workweek profile, holiday overdraft and entry/exit dates are to be configured. It is explained next.

 *It is to note that, contrary to the Main Planning Page (Fig.7.106), users with no assessed workweek profile are shown here, as the Manage Staff Page's main aim is to configure users in that regard.*

7.11.4.4 Configuring an employee

Fig.7.114 shows the data that can be individually configured for each employee. Apart from a menu allowing to set an allowed holiday overdraft in days, a button allows to configure the of assessed workweek profiles on a dedicated page, detailed further down.

Those configuring operations have to be done before using HRM.

Two calendars allow to define entry and exit dates of user in the company :

[Manage Staff Page] HANSON Thomas (...) :

Modify employee profile

User : **Thomas HANSON**[Sales Department]

Current workweek profile : Regular

Default workweek profile : Regular

Hol. overdraft (days) : 2

Entry date : 2/1/2004

Exit date : <none>

Category : Salesmen




Figure 7.114: The *Manage Employee Page* : human-resource data of a user inside Blue Chameleon.

2/1/2004 

2/1/2004 

Jan 2004

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

If employee is a permanent one, then setting exit date to 'None' (or any date for that matter) is done by clicking on the button in this calendar. This no-date option is also in force on the search calendars of the *Manage Staff Page*. If a date was selected by mistake in the calendar, it can be re-initialized to its former value by clicking the button.

If nothing is configured for the user yet, it is to note that, when validating changes via **Modify**, the default planning for this user is filled according to the **default workweek profile** (which must be defined in any case) and entry/exit dates. If for instance no entry date is defined, planning is filled beginning at the start of the current year ; if no exit date is defined, planning is filled until the end of the current year.

For more complex plannings, the **Details** of user's set workweek profiles can be configured, as explained next.

Lastly, the 'Category :' field shows the activity categories (7.11.4.6.1) that have been defined and allows to assess one to this employee.

7.11.4.4.1 Configuring workweek profiles As Fig.7.115 shows, on the upper part of the page, a workweek profile is chosen in a menu, along with a date from which it starts : validating this with the **Apply** button will fill/reformat the planning for this user with that workweek profile from this date on (always automatically set to be a Monday).

[Manage Staff Page] HANSON Thomas (...) **Modify** / **Details** :

Weekly schedule details

User : **Thomas HANSON**[Sales Department]

Current workweek profile : **Regular**

Apply : starting :

Year :

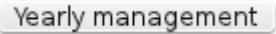
Week	Workweek profile
02/01/2012 - 08/01/2012	<input type="text" value="Regular"/>
09/01/2012 - 15/01/2012	<input type="text" value="Regular"/>
...	...
24/12/2012 - 30/12/2012	<input type="text" value="Regular"/>
31/12/2012 - 06/01/2013	<input type="text" value="Regular"/>

Figure 7.115: Two ways by which to configure the weekly schedules of an employee.

For users that may have a more complicated schedules, i.e. weekly schedules subjected to change along time, the lower part of the interface allows, *for each week of the current year*, to choose one specific workweek profile ; any change done that way is validated

through the  button at the bottom of the page.

7.11.4.5 Yearly management

When the end of the year comes - or even anytime in the year, it is necessary to fill in plannings by default for the next year : this is done as shown on Fig.7.116 via the  as found on the *Planning Administration Page*.

This page (endowed with the usual user-related search menus) indicates for each user until which date the planning is filled, and also warns if a user has no workweek type assessed to her/him, in which case user has to be configured as shown at 7.11.4.4.

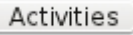


The process of filling plannings for the next year, covering all employees, may take some time for the server to complete.



It is to remember that, before filling the plannings by default, the workweek profiles for the next year can be modified thanks to the interface as seen in Fig.7.115 ; otherwise, filling is done according to the workweek profile in force at the last week of the current year.

7.11.4.6 Configuring activities

Before starting using activities (7.11.10) in the planning, it is of course necessary to define them first, a task which is done through the  button as seen on the *Planning Administration Page* (Fig.7.109).

To make their assessment to users easier, activities are gathered in **categories**.

7.11.4.6.1 Activity categories Fig.7.117 shows how an activity category is defined, consisting only in a name.

Afterwards, an activity category is assessed to an employee on her/his *Manage Employee Page* (Fig.7.114).

Categories can be modified name-wise or removed (if they do not contain any activity) with the eponymous buttons.

7.11.4.6.2 Defining activities With activity categories defined as shown above, activities themselves are defined as featured at Fig.7.118.

The short label is featured whenever display is under size constraints, e.g. when there are two activities in the same day or when activity is not the only thing in the planning

[Planning Administration Page] Yearly management :

Yearly management

User group : <All> User : <All>
User status : Enabled User type : merchant company Search

User	Planning filled until
HANSON Thomas	31/12/2012
JONES Jack	31/12/2012
KOVÁCS Jane	31/12/2012
LAVEREAU Dwayne	06/06/2012
MALONE Richard	31/12/2012
ROBBS Harry	31/12/2012
RUSSELL Mary	31/12/2012
SAWYER James	31/12/2012
WINSTON Karen	31/12/2012
ZMUDA Robert	No workweek type ! Planning not filled !

Fill planning for 2013 :

User	Planning filled until
HANSON Thomas	31/12/2013
JONES Jack	31/12/2013
KOVÁCS Jane	31/12/2013
LAVEREAU Dwayne	06/06/2012
MALONE Richard	31/12/2013
ROBBS Harry	31/12/2012
RUSSELL Mary	31/12/2013
SAWYER James	31/12/2013
WINSTON Karen	31/12/2013
ZMUDA Robert	No workweek type ! Planning not filled !

Figure 7.116: Filling the plannings by default for year 2013 ; it is to note that the fill does not affect temporary employees (whose exit date is within the current year) and unconfigured employees (respectively Dwayne Lavereau and Robert Zmuda in this example).

cell.

After their definition, activities' names can be modified or their categories changed ; they can be removed provided that they have not been yet used in the planning.

7.11.4.7 Holiday notifications

Whenever a user creates a new holiday request (7.11.5.2), another user (for instance the leader of her/his group) can receive an email notification of it, and, if rights are sufficient, can give an opinion on this request (7.11.5.8) before it is reviewed.

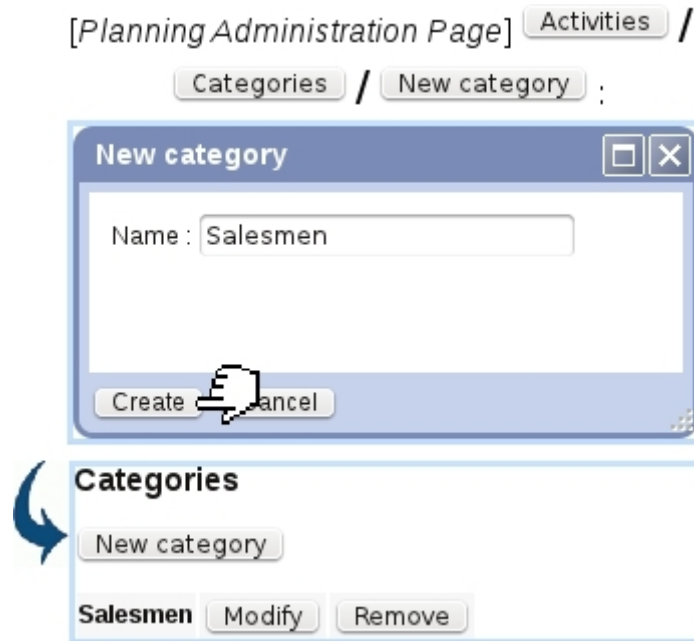


Figure 7.117: Defining a new activity category 'Salesmen'.

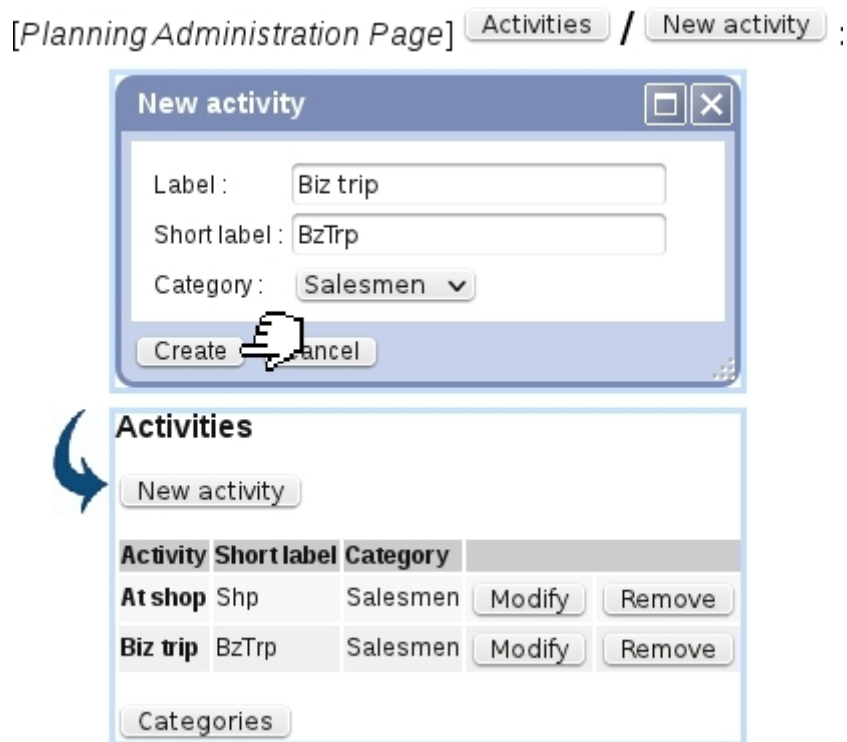


Figure 7.118: Defining an activity 'Biz trip', related to category Salesmen.

Those notifications are sent automatically to whomever has been set as the recipient(s).

As described on Fig.7.119, through the **Notifications** as found on the *Planning Ad-*

ministration Page (7.11.4), a list of users is found, with for each which user(s) will be notified of the request and confirmation, as also an email can be sent when holiday is confirmed or refused.

On this configuration page, one or several users can be set as receiving the holiday request notifications and/or confirmations.

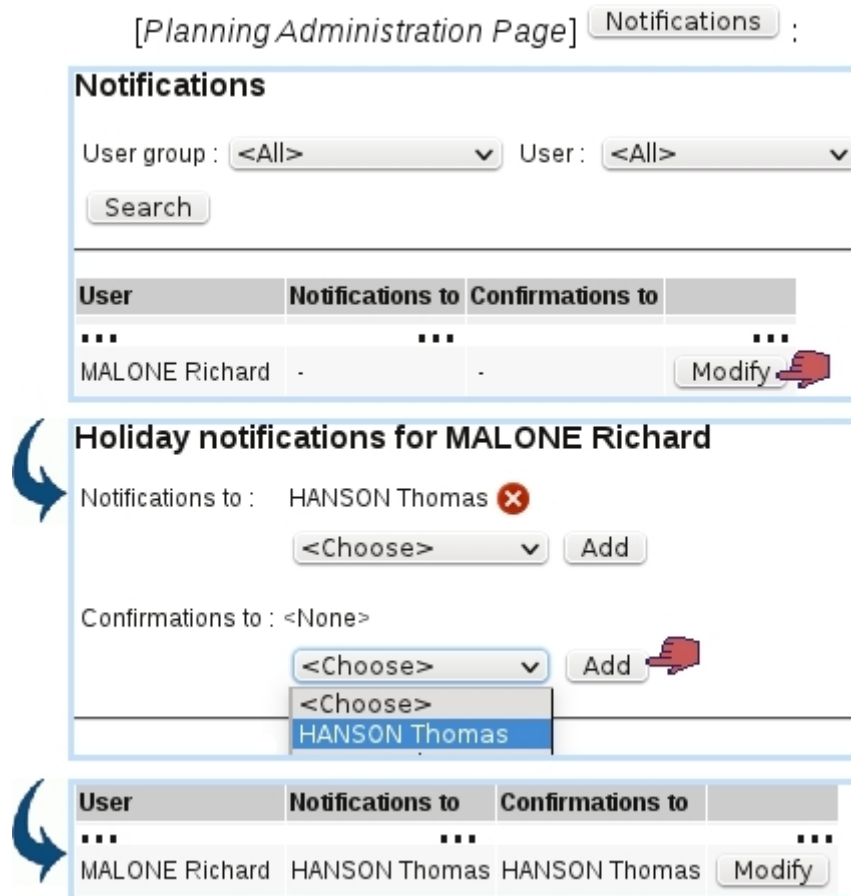


Figure 7.119: User Thomas is set as the receiver of Richard’s holiday request notifications and confirmations.

7.11.4.8 HRM reports

As illustrated below, this functionality allows managers to display, for a custom range of dates, the number of days/hours for each kind of occupation (normal work, overtime, holidays, sick leaves) ; a specific user group can be chosen.

Thanks to the eponymous button, a PDF version of the search results can be printed out along a print model.

7.11.4.9 User teams

Teams aim at grouping users which perform tasks together ; they may used to define what is done on a planning cell, similarly as for activities (7.11.10).

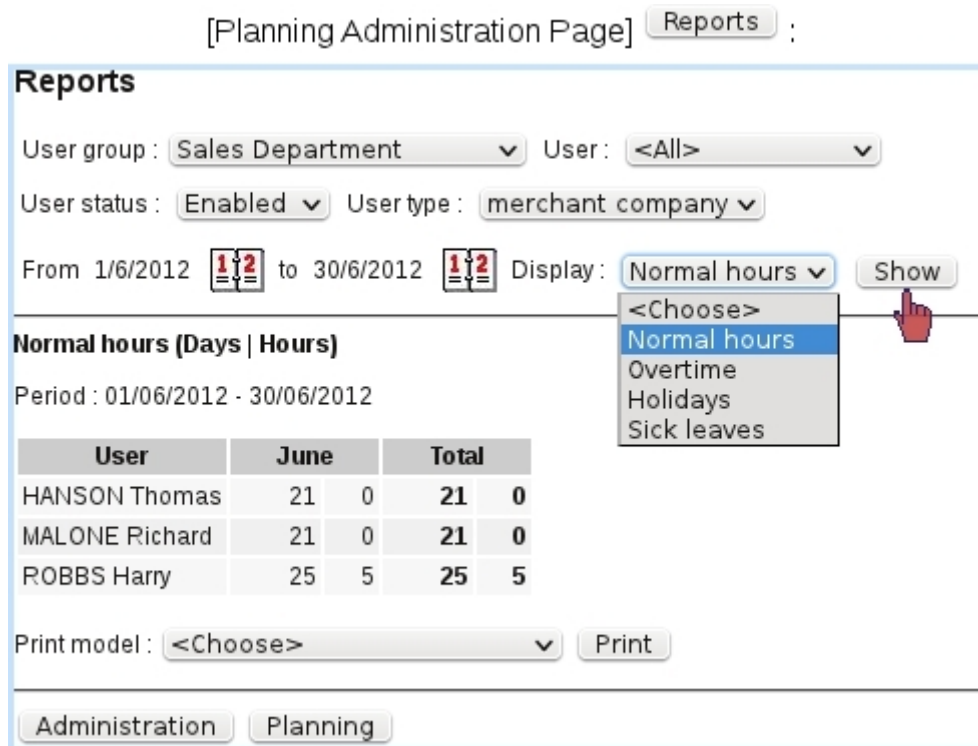


Figure 7.120: Days and hours as worked by the Sales Department for June 2012.

As shown on Fig.7.121, a team is defined with the following data :

- a name and short name ;
- optionally, an activity category (7.11.4.6.1) to restrict team to only users belonging to that category ;
- whether this team is visible in Activities/Teams menus ;
- whether this team is accessible (i.e. can be assessed) to users that do not belong to it ;
- a menu with users (that may only show a subset of users if the 'Category:' menu further up has been set to other than 'None'), each of them added by + and removed by x. They may be 'selected by default' and one user is defined as leader ; those concepts are relevant in the Projects/Timesheets add-on when adding a Timesheet for a team (7.10.8.2.1).

After, teams' data (members, leaders, visibility...) can be viewed at a glance ; they can also be modified or deleted (provided they are not used in the planning yet) :

[Planning Administration Page] Teams / Add team :

New team □ ✕

Name :

Short name :

Category :

Visible :

Accessibility : Open

Teammates :

User	Selected by default	Leader	
<None>			
HANSON Thomas	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

Teammates

User	Selected by default	Leader	
HANSON Thomas	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
MALONE Richard	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
ROBBS Harry	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
<Choose>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

Figure 7.121: Defining a team 'Report Writers'.

[Planning Administration Page] Teams :

Teams

Name	Short name	Function	Users	Visible	Accessibility	
Report Writers	Writers	<None>	Dick, Harry, Tom	Yes	Open	

7.11.5 Holiday use

How to exhaustively manage employees' vacations is elucidated in the following.

7.11.5.1 The *My Holidays Page*

As accessed via the eponymous button as found on the *Main Planning Page*, this page as illustrated on Fig.7.122 offers the **current user** a general view upon her/his holidays, featuring :

- a search tool by holiday status (all, pending, confirmed, refused and canceled) ;
- a search tool by year, including the current, previous and next ones.

[Main Planning Page] **My holidays** :

My holidays
Jack JONES[Administrator]

Status : Year :

Start	End	Duration	Status		
22/06/2011	28/06/2011	4 days	Confirmed	View	Modify
17/01/2011	20/01/2011	2 days - 4 hours	Confirmed	View	Modify
10/01/2011	10/01/2011	1 day	Confirmed	View	Modify
27/12/2010	06/01/2011	8 days - 4 hours	Confirmed	View	Modify

Figure 7.122: User Jack Jones views his confirmed 2011 holidays.

Search results are shown in a table giving holiday's start and end dates, duration, and status ; also, two click-links allow to view (7.11.5.3) and modify (7.11.5.4) in detail this holiday, while, at the bottom of the page, a button allows to plan (7.11.5.2).

7.11.5.2 Planning holidays

Holidays, for a given user, can be planned according to the value of "Holiday rights" (7.11.2) :

- by herself/himself if they, for 'Owner', are at least set to 'Create/Modify' ;
- by others if they, for 'All', are at least set to 'Create/Modify'.

Planning new holidays will create a holiday request that will be reviewed by the person in charge of it (7.11.5.7).

Holidays can be planned in two possible ways, either of them leading to a screen as featured in Fig.7.123 and 7.124, where start and end dates can be chosen with two pop-up calendars :

- via the *Main Planning Page*, by clicking on an empty cell (and then choosing "Holidays" on the Manage Day pop-up, 7.11.3.2) : both calendars will then be set to the date corresponding to the clicked cell ;
- or via the **New holidays** button as found on the *My Holidays Page* (7.11.5.1).

It is to note that both start and end dates can be modified. If user has enough days remaining to take her/his planned holiday, the request is validated and user is either redirected to the *Main Planning Page* or *My Holidays Page*, where this new request is seen as pending.

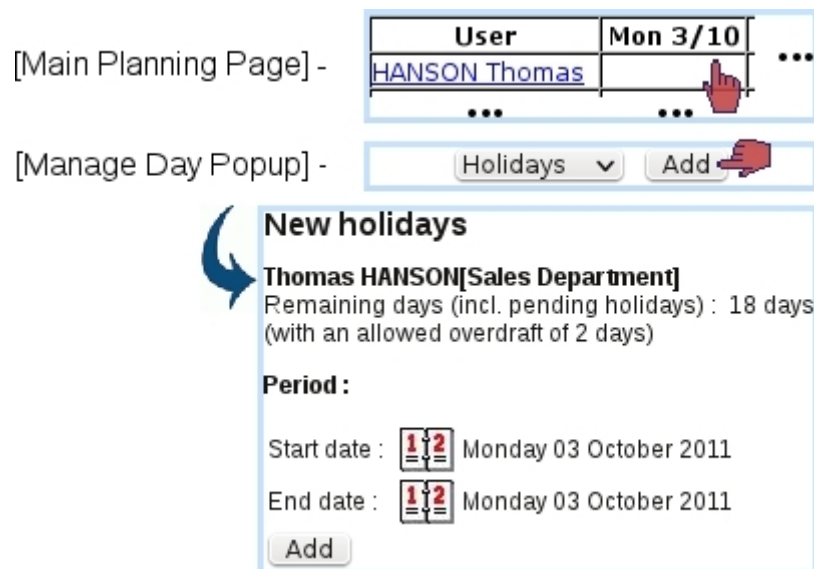


Figure 7.123: Defining new holidays, directly from the Holiday planning.

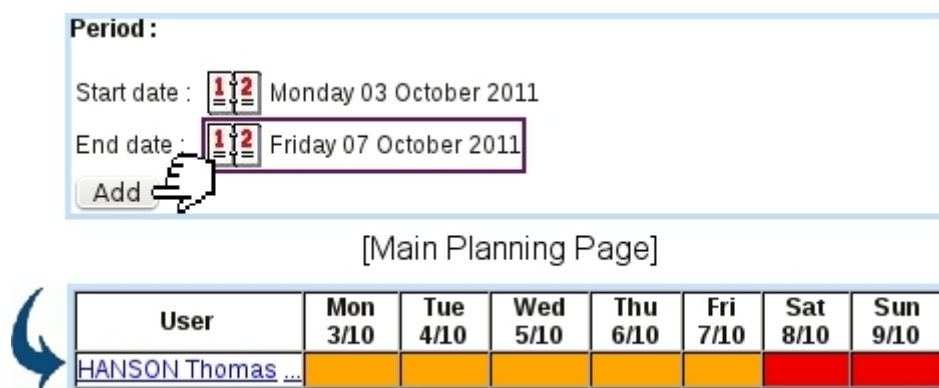


Figure 7.124: Once start and end dates have been chosen, new holidays can be finally validated.

The holiday request as created assumes that full days are taken ; **if user wishes to plan half-days (or more complicated hourly patterns), the (still unreviewed) request can be then modified (7.11.5.4).**

It is to note that, thanks to the overdraft amount as set during assessing workweek profile to users (7.11.4.4), a user can plan holidays/do modifications that go over her/his day balance.

7.11.5.3 Viewing holidays

[Jack's My Holidays Page] 17/01/2011 | 20/01/2011 | ... | [View](#) :

View holidays

User: **Jack JONES[Administrator]** - From 17/1/2011 to 23/1/2011

Holiday dates : **17/01/2011 - 19/01/2011** confirmed by admin on 14/1/2011 15:50

<< December	<	Mon 17/1	Tue 18/1	Wed 19/1	Thu 20/1	Fri 21/1	Sat 22/1	Sun 23/1	>	February >>
8 - 9										
9 - 10										
10 - 11										
11 - 12										
12 - 13										
13 - 14										
14 - 15										
15 - 16				At shop						
16 - 17										

Figure 7.125: User Jack views his confirmed holidays.

A user can have a detailed view her/his holidays via the [View](#) link as available on the *My Holidays Page* (Fig.7.122). This link is always available whatever holiday's status is. Clicking on it leads to what is shown for instance on Fig.7.125 : the whole span of the holidays is shown vertically, while now horizontally, the schedule of days/hours is detailed.

This detailed view is also accessible from the *Main Planning Page* by simply clicking on the related holiday.

The span of displayed hours depends on user's planning properties (7.11.4.4).

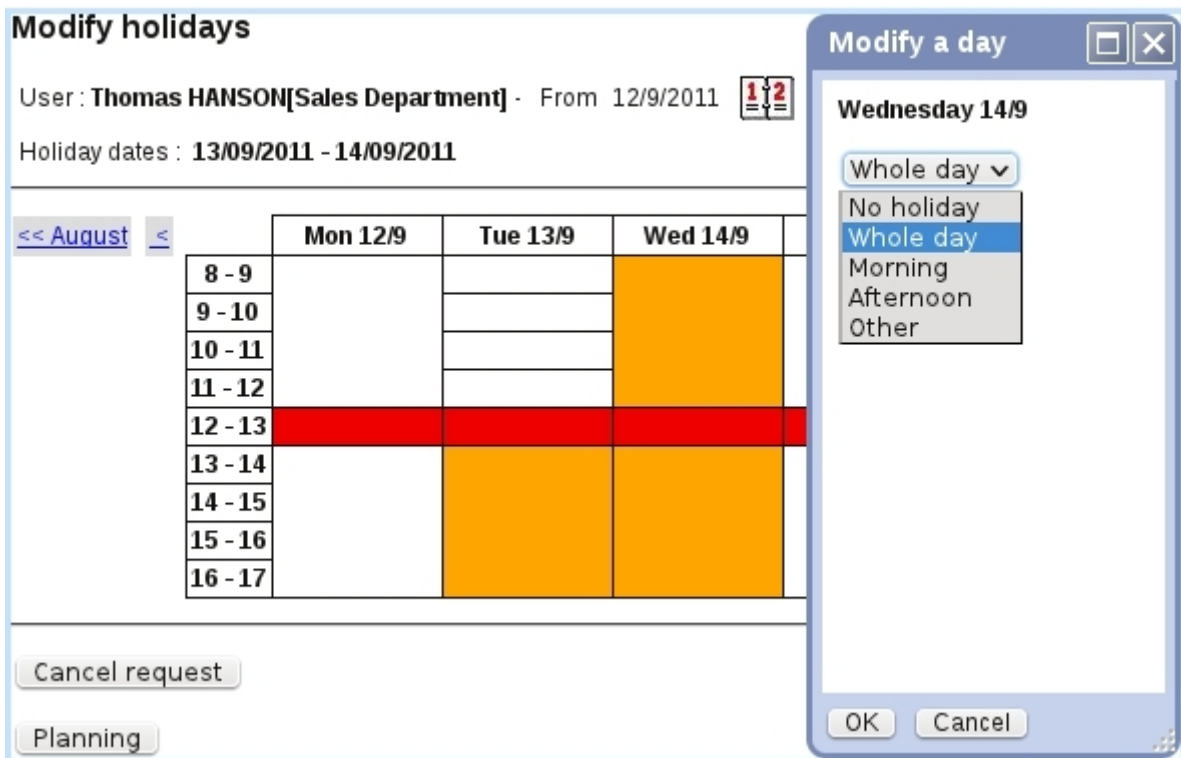


Figure 7.126: Showing the choices to which modify the Wednesday of this holiday request.

7.11.5.4 Modifying holidays

For most users, i.e. whose 'Holiday' right as 'Create/Modify', modifying holidays is only possible with those which have not been confirmed/refused yet. "Manager" users, with 'Review' rights on the other can modify holidays which have been confirmed.

Accessing the page where a holiday is modified can be done :

- either from the *Main Planning Page* (provided that the displaying of pending holidays has been enabled through the checkbox) by clicking any day of the aimed request. This can be achieved by user herself/himself (provided that s/he is able to create holidays for herself/himself) and other users (provided their "Holiday rights" for 'All' are at least set to 'Create/Modify') ;
- or via the [Modify](#) link as available on the *My Holidays Page* (only for related user).

Either way, user is led to the page as featured in Fig.7.126, where, in a detailed presentation very similar to the *View Holidays* one, each day can be clicked on. A pop-up then appears with various choices, to apply changes to this selected day :

- canceling this day from the request ("No holiday") ;
- making it a Whole day ;

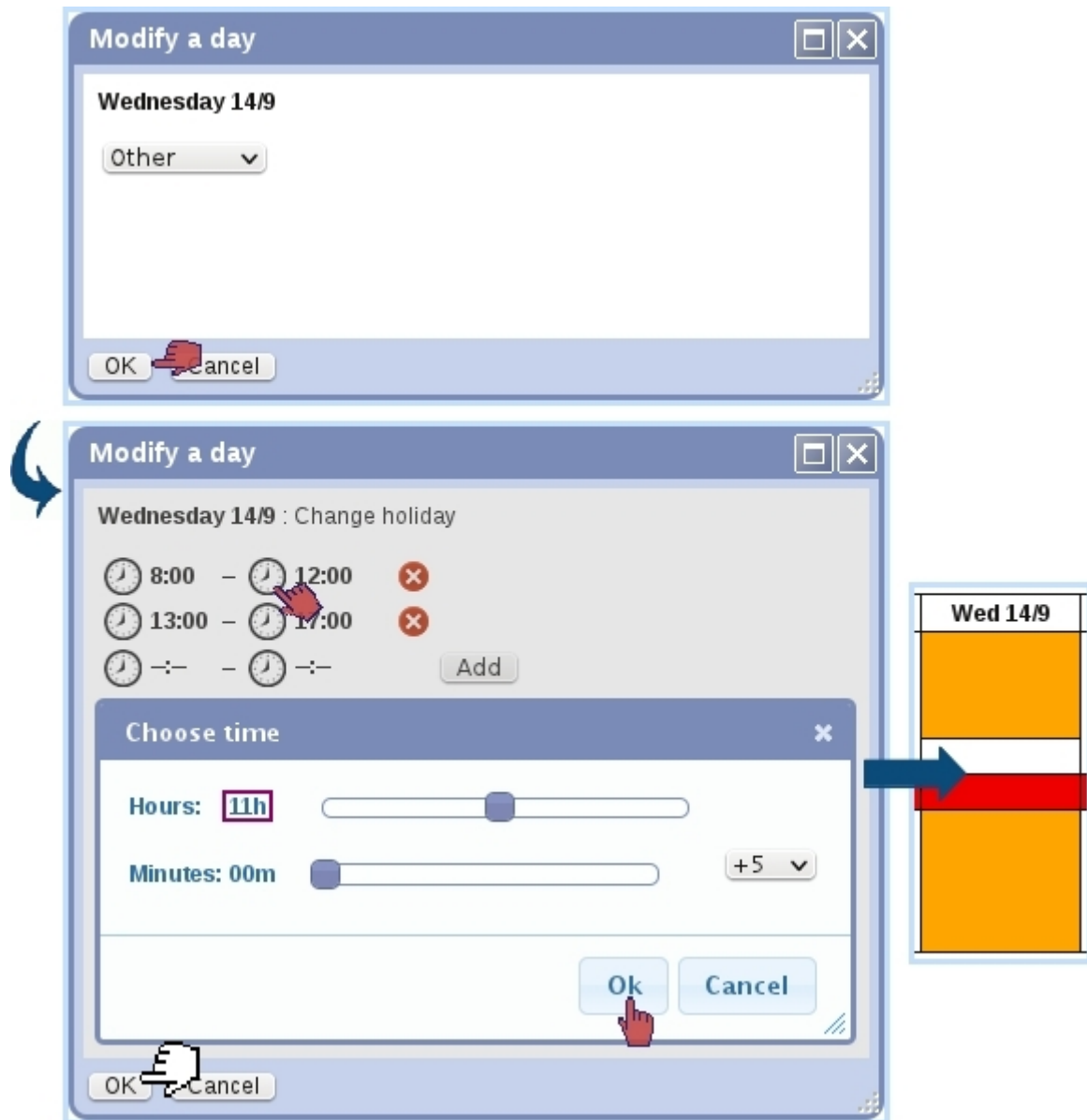



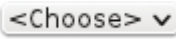
Figure 7.127: Defining a schedule for this Wednesday, where off-time is counted in a matter of hours and minutes.

- taking only the Morning or Afternoon ;
- choosing a detailed hourly schedule ("Other"), as shown on Fig.7.127.

A begin or end time is fixed the following way :

- the corresponding clock  is clicked ;
- a new window appears, where hour and minute sliders allow to choose a specific time ; depending on what has been selected in the menu right to the minute slider, minutes can be chosen either as :00 or :30 (" +30"), by gaps of 5 minutes (" +5") or by gaps of 1 minute (" +1") ;

- clicking on "Ok" then validates the time.

A predefined workday profile (7.11.4.1) can also be chosen in the  menu.

Whichever choice is made, and provided related user has enough hours left to make certain change, the modifying appears immediately.

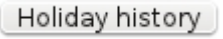
7.11.5.4.1 Adding new days to a holiday request If user has at least one day or enough hours left, s/he (or a high-clearance user with sufficient rights) can add a new day to the current holiday request as displayed on the *Modify Holiday Page* by simply clicking a blank day : a pop-up window, with similar choices as shown above (except of course for "No holiday") will be shown.

While it is possible to add a day that is not contiguous to the already-existing holiday period, it is not possible to add a day so that another request stands between this day and the current request.


7.11.5.4.2 Canceling a holiday request Similarly as for modifying, a holiday request can be canceled by related user if it has not been confirmed yet. "Manager" users, with 'Review' rights, can cancel requests which have been confirmed.

The cancellation is then achieved via the  button as seen on Fig.7.126.


7.11.5.5 User's holiday history

A page displaying a user's holiday history for the current year (as well as for the previous year) is available through the  as found in the User's Information pop-up (7.11.3.1). This page can also be accessed directly via user's name click-link as found on the *Manage Users' Holidays Page* (7.11.5.6) and the *Credit/Debit Page* (7.11.5.9).

An example of holiday history is featured at Fig.7.128. This page shows for this particular user and the current year the various holidays that have been confirmed, as a click-link to the *View Holiday Page* (7.11.5.3) ; also shown are holiday credits and debits (other than vacations) that have been done for this user (7.11.5.9).

At the bottom of the User's Information pop-up (or at the bottom of the page when holiday history is accessed through the aforementioned other means) lies a  button allowing to generate a formatted PDF file of the display, along a print model (13.2).

7.11.5.6 The *Manage Users' Holidays Page*

For users that have been granted sufficient ('Credit/Debit') "Holiday rights", the *Manage Users' Holidays Page* is accessed through the  button rendered available at the *Main Holiday Page*.

[Main Planning Page] [Jane Kovács](#) / :

User information

Holiday history

Jane KOVÁCS[Accounting]
Pending holidays : 5 days

Year :

Request	Confirmation	Label	Days	Hours
-	03/01/2011	Transfer 2010-2011	10	6
-	05/01/2011	Credit 2011	25	0
11/03/2011	14/03/2011	21/03/2011 - 01/04/2011	-10	0
15/06/2011	17/06/2011	20/06/2011 - 24/06/2011	-5	0
Total :			20	6

Remaining holidays : 20 days 6 hours

Print model :

Figure 7.128: The *Holiday History Page*.

[Main Planning Page] :

Staff holidays

User group : User :

User status : User type :

Request status : Year : - Print model :

2 pending requests, group Accounting, 2011 :

User	Request date	Period	Status	
KOVÁCS Jane	24/11/2011	05/12/2011 - 09/12/2011	Pending	<input type="button" value="Review this request"/>
RUSSELL Mary	15/11/2011	07/12/2011 - 09/12/2011	Pending	<input type="button" value="Review this request"/>

Figure 7.129: The *Manage Users' Holidays Page*.

There, as featured on Fig.7.129, search tools consisting in user groups, users, user access status, holiday status and year allow to display holiday requests. For confirmed requests, a button is available to generate a print-friendly PDF account on the request, along a print model (13.2).

For pending requests, if user has even superior rights ('Review'), a **Review this request** button is available to accept or deny this holiday request (7.11.5.7).

The **Credit management** button leads to a page where users' holiday credit can be modified (7.11.5.9).

7.11.5.6.1 The "Pending request" event control When a user logs in, provided that s/he has got 'Review' rights, the pending requests to process (7.11.5.7) may be conveniently displayed in an event control (1.3) as featured in Fig.7.130. There :

- each request can be clicked and reviewed individually ;
- the more [more](#) link leads to the *Manage Users' Holidays Page* where all pending requests (whichever the user, user group and year) are displayed.



Figure 7.130: The HRM event control, displaying pending holiday requests to process.

7.11.5.7 Accepting/refusing a user's holidays



Figure 7.131: The displaying of full user group's schedule helps to decide whether to accept or not user's requested holidays.

With conditions stated above, the **Review this request** is available and leads to the page as featured at Fig.7.131, where :

- related user's holidays are displayed in all their duration, along with the holiday schedule of all the users of her/his user group : this thus allows to have a documented view of what everyone in the related user group is at at the time of those requested holidays. Therefore, this allows for instance to prevent that everyone in the same user group might be on holidays at the same time ;
- this schedule can be browsed in a weekly or monthly way, along with two browsing calendars (similarly as on the *Main Planning Page*) ;
- clicking on any pending day, whether it belongs to the reviewed user or any user of her/his group, allows to see it in detail and even to modify it, similarly as in 7.11.5.4.

When decision is made, holiday request is either confirmed or denied via the **Accept** and **Refuse** buttons.

Whatever the decision is, an email is sent to the user who requested the holidays, and also, if applicable, to the users who were set as the recipients of confirmation mails (7.11.4.7).

7.11.5.8 Pre-evaluating a user's holidays

Some users (who are for instance the leader of their group), though they do not have the administrative rights to accept or refuse holiday requests, may nonetheless be able to give their opinion - positive or negative - on a holiday request ; this is ruled by the 'Holiday supervisor' right (7.11.2).

For instance, Tom, who has this right set to 'Evaluate' for his group and user Richard had been set as a (passive) sender of holiday notifications (7.11.4.7) : these are the two conditions for the 'Evaluate : ' choice to appear on Richard's *Modify Holiday Page* as seen by Tom (Fig.7.132).

This possibility helps administrators (who might not always be up-to-date about the schedule of a user group) to make the decision of accepting or refusing holidays.

7.11.5.9 Managing users' holiday credit and debit

As a depleting resource, holidays are replenished from time to time in the form, for instance, of a yearly credit. To do so, a convenient page is accessible via **Staff holidays** / **Credit management** (a button which only appears when user's "Holiday management" (7.11.2) is at least set to 'Credit/Debit'), as featured on Fig.7.133. There :

- a specific user group and/or user can be chosen (and user access status, 9.4.3), as well as year on which the operation will be credited/debited on ;

[Harry's Modify Holidays Page, as seen by Tom] :

Modify holidays

User : **Richard MALONE**[Sales Department] - From 11/6/2012 to ...

Holiday dates : **11/06/2012**

<< May <

	Mon 11/6	Tue 12/6	Wed 13/6	Thu 14/6
8 - 9				
9 - 10				
10 - 11				
11 - 12				
12 - 13				
13 - 14				
14 - 15				
15 - 16				
16 - 17				

Evaluation :

[Harry's Review Holidays Page, as seen by Admin] :

Review holiday request

User : **Richard MALONE**[Sales Department] - From 11/6/2012 to ...

Holiday dates : **11/06/2012** - Evaluation : **Positive(Thomas HANSON)**

...

Figure 7.132: Tom, a holiday supervisor for his own group, views Richard's unconfirmed holidays and can give his opinion on them.

- on the then displaying list of users, each of them can be chosen (or not) via a checkbox (it is also possible to select all users through the eponymous button) ;
- an amount of days and/or hours is given, to be either credited or debited ;
- a label can be entered, which will then be displayed on the *Holiday History Page* (7.11.5.5).

Also, a button conveniently allows to automatically transfer vacation balance of selected users to the year following the one featured in the menu ; for instance, if "Transfer selected users balance to 2013" appears (year 2012 is selected in the menu) :

- clicking on that button will thus set to 0 balances for 2012 and,
- on *Holiday History Page* for 2013, the transferred balances will appear with the label "Transfer 2010-2011".

Users' holiday credit management

User group : [Sales Department](#) User : [<All>](#)

User status : [Enabled](#) User type : [merchant company](#) [Search](#)

Year : [2012](#)

	User	Current workweek profile	Days	Hours
<input checked="" type="checkbox"/>	HANSON Thomas	Regular	11	4
<input checked="" type="checkbox"/>	MALONE Richard	Regular	9	4
<input type="checkbox"/>	ROBBS Harry	Sat Morning	16	5

[Select all](#)

Add to selected users days - hours

Credit Debit

Label : [Bonus AAA Salesmen](#)

On year : 2012

[Add](#)

Transfer selected users' balance to year : 2013

[Transfer](#)

Figure 7.133: An example where some extra holidays are credited to a few selected users.

7.11.6 Overtime management

During the course of a company's life, employees may have to work further hours than they are supposed to or work during days where their weekly schedule (7.11.4.1) means they are not supposed to.

This is why Blue Chameleon's HRM handles the management of overtime, through a simple interface, which can be brought up in two ways :

- by clicking on a white part of the planning, bringing up the Manage Day pop-up (7.11.3.2) and choosing 'Overtime' ;
- by clicking on a red part of the planning for adding work in that normally un-worked day.

Fig.7.134 shows for instance how a Saturday morning is declared as worked, by a user who is not supposed to work that day. On the then-displayed *Change Work Schedule Page* :

- hour and minute menus for start time and end time are displayed, from which a worked span can be filled in ;
- several worked spans can be **Add**'ed, provided than they do not overlap ;
- a worked span can be deleted through the **✖** icon ;
- a predefined worday profile (7.11.4.2) can be selected in the **<Choose>** menu to load a specific schedule.

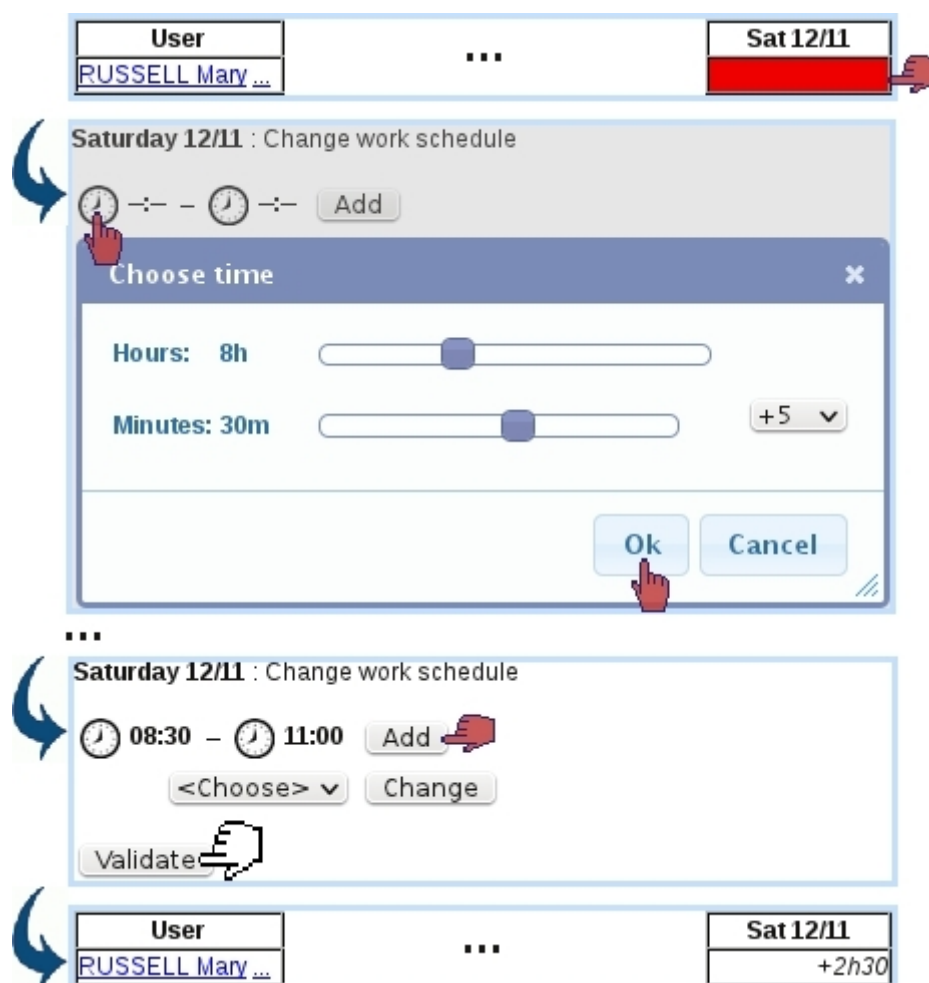


Figure 7.134: Declaring this Saturday morning as worked.

Afterwards, the overtime is featured on the *Main Planning Page* : the clicked cell has been rendered white and the overtime amount in hours and minutes is featured.

The adding of overtime for an already-worked day is done through a similar interface, except than worked times are pre-loaded. They can be modified and other worked spans can be added :

Tue 8/11
 [Manage Day Popup] Overtime ▾ Add :

Tuesday 8/11 : Change work schedule


🕒 8:00 – 🕒 12:00 ❌

🕒 13:00 – 🕒 17:00 ❌

🕒 :-: – 🕒 :-: Add

<Choose> ▾ Change

Validate

 Changing the schedule of an already-worked day also allows to define **undertimes**, e.g. in case employee got in late. They will be featured as negative time, for instance ”-3h30”.

Overtimes can be seen as a summary on the month’s work history (7.11.8).

7.11.6.1 Modifying overtimes

Once a planning cell is endowed with overtime (or overtime), this overtime can be modified by using the ”Overtime” option again at the bottom of the *Manage Day Popup* (Fig.7.135).

Tue 8/11
 +2h45 [Manage Day Popup] Overtime ▾ Add :

Tuesday 8/11 : Change work schedule

🕒 8:00 – 🕒 12:00 ❌

🕒 13:00 – 🕒 19:45 ❌

🕒 :-: – 🕒 :-: Add

<Choose> ▾ Change

Validate

Figure 7.135: Accessing the details of a workday.

7.11.7 Changing a workweek or a workday to another profile

The configuring of workweek profiles for an employee (7.11.4.4.1) showed extensive and detailed possibilities for those for the whole year.

Now, in order to change in a more casual way, by user herself/himself (or, depending on the user rights, others users) the profile of a week (stemming for instance from an

exceptional change) for profile of a particular week, Blue Chameleon's HRM allows it to be done directly from the planning, by bringing up the Manage Day pop-up (7.11.3.2).


There, a menu below 'Weekly planning' shows the current workweek profile that had been configured for the week ; this menu features all already-defined workweek profiles (7.11.4.1) and it is then possible to change week to any of those.

The same can be done for a single day : a particular planning can be set for the clicked day, **independently from the week's profile**. Under 'Daily planning', the already-defined workday profiles (7.11.4.2) are shown and the clicked day can then be set to any of those. In order to reinitialize the workday profile to the one given by the workweek profile, 'Choose' must be selected.


7.11.8 Work history

In order to keep track of overtimes at a glance, or more generally to check the number of worked hours, holidays and sick leaves in a month, Blue Chameleon provides a detailed monthly account of the work history. It is accessed through the eponymous button as found on the User's Information pop-up (7.11.3.1).

Fig.7.136 shows an example where the overtimes as defined as examples in 7.11.6 can easily be seen. The normally-worked days, as defined by employee's weekly schedule (7.11.4.1), is shown just after the 'Activity' column. Any day which is at least partially worked (this includes days which are partially holidays or sick leaves) is featured there.

At the bottom of this popup, a PDF version of the month's work history can be ed out along a print model (13.2).

7.11.8.1 Converting overtime

As seen on Fig.7.136, next to each overtime, there is a  button that allows, as shown on Fig.7.137, to convert overtime in a equal amount of vacation time. This button only appears if user has 'Credit/Debit' rights.

Clicking on this button shows a popup where a time range is chosen, the amount of which will be added as vacation hours. In this example, the overtime corresponded to a worked Saturday morning, from 8 to 12 ; we choose to fully convert it by inputting those times in the hour menus.

As a result, on the *Holiday History*, this credited will appear as 'Compensation [Date]'.

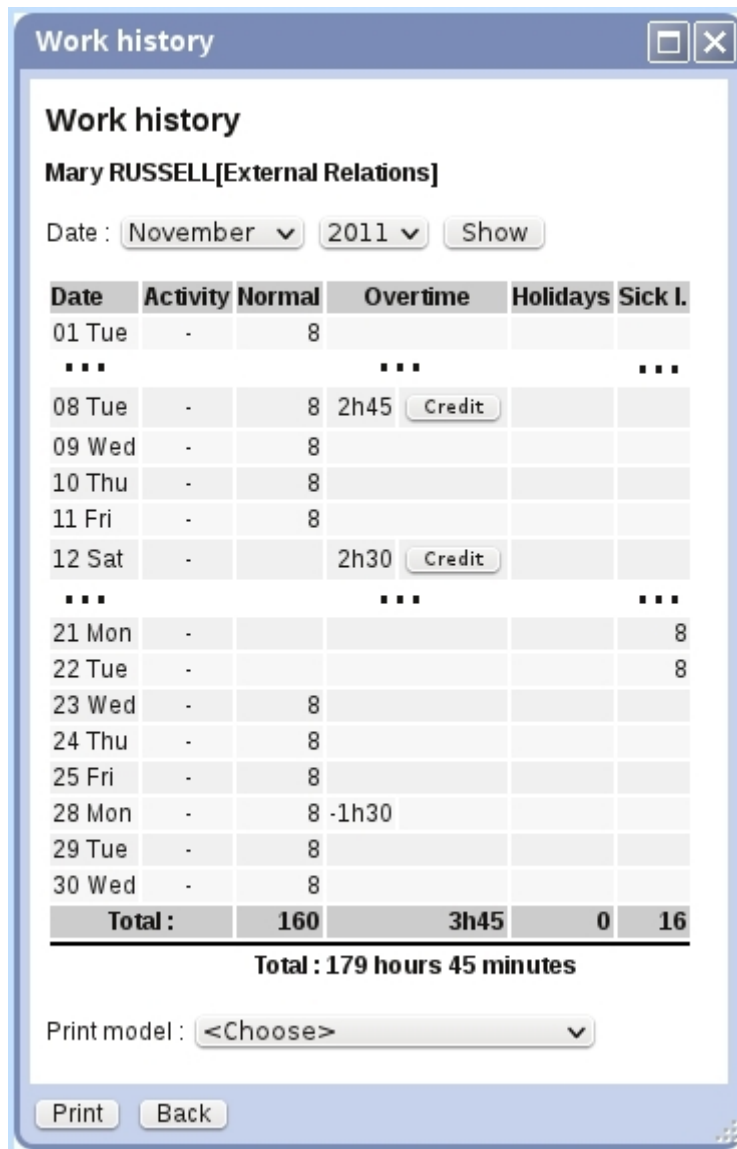


Figure 7.136: The work history for this user on November 2011.

7.11.9 Sick leaves

Sick leaves are planned and handled in a very similar way as for holidays, but this time without restriction of a limited number of days, and according to the value of the "Sick leave right" (7.11.2).

Declaring a sick leave is then done :

- by clicking on an empty cell on the *Main Planning Page*, thus bringing up the *Manage Day* pop-up (7.11.3.2) and choosing "Sick leave" there ; it then redirects to an identical page (with two calendars) as seen for new holiday planning ;
- by clicking on a cell that already contains a sick leave ; redirected on a *Modify Planning Page*, identical to the *Modify Holidays* one (Fig.7.126), it becomes possible, by clicking on an empty day, declare this day as a sick leave.



[Holiday History] :



Figure 7.137: Crediting overtime as vacation time.

7.11.9.1 Modifying sick leaves

Modifying already-defined sick leaves is done through the *Modify Planning Page*, where clicking on the sick day brings a pop-up where sick leave can be modified to Morning only or Afternoon only, to the Whole Day, or to another more complicated schedule (just as in Fig.7.127). The sick leave for that can be also canceled through the 'None' choice.

7.11.9.2 Sick leave history

Identically as for holiday history, a reminder of a user's sick leave history for the current year (and also the previous one) can be displayed through the **Sick leave history** button as found on the User Information pop-up (7.11.3.1). A **Print** tool to generate a PDF account of the user's sick leaves (dates) is also available.

7.11.10 Activities

If wanted, activities as used in the planning aim to make more precise what an employee is at ; they are individually assessed to a particular user at a particular day.

For the 'activities' feature to be properly used :

- Activity categories (7.11.4.6.1) and activities (7.11.4.6.2) must be defined ;
- a category must be assessed to each user (7.11.4.4), if one wants her/him to use them.

7.11.10.1 Setting activities for a day

Most easily, activities can be assessed from the Manage Day Popup (7.11.3.2) for any day ; the conditions as cited above must be filled. In addition to this, user must have enough rights to assess 'Activities' (7.11.2).

As featured on Fig.7.138, the *Manage Day Popup* is opened for user Tom on a certain day ; he was configured on his *Configure Employee Page* (7.11.4.4) as belonging to the category 'Salesmen', for which two activities 'At shop' and 'Biz trip' were defined. They can be thus assessed to him, one for the morning, one for the afternoon.

[Manage Day Popup, HANSON Thomas, 23/03/2012] :

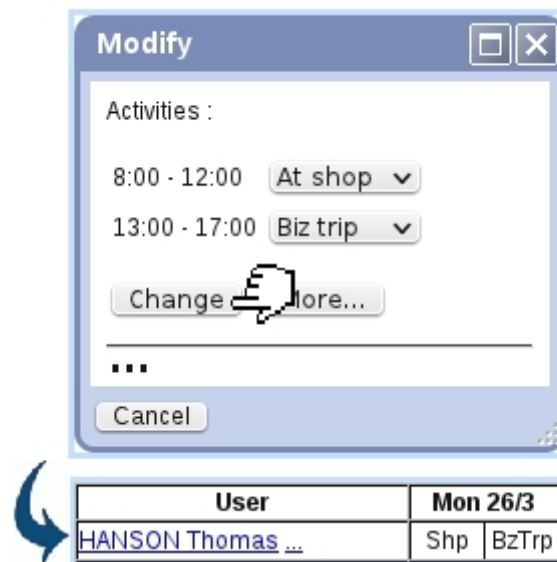


Figure 7.138: Changing Tom's activities for a day.

Happening in the same day, they finally appear in the planning in their short label form, as to reduce the span of the display.

7.11.10.2 Setting activities for a week or month

As the previously described daily setting of activities can be too time-taking for long, homogenous periods of activities, the **More...** button as seen right to the **Change** one (Fig.7.138) allows for weekly and monthly settings of activities.

As shown at Fig.7.11.10.2, clicking on the **More...** button then displays a popup where two choices are available through a toggle : either show the current week, or the current month :

- in the former case, activities of that week are set day by day (that is worked), with a single choice for each day, applying to the whole day ;
- in the latter case, activities of that month are set week by week (for each week that at least has a worked day), with a single choice for each week, applying to the whole week.

This systems allows for fast configuring of employees' activities, if those do not vary much during a day or during a week. If activities set that quick way need to be fine-tuned for a certain day, it can still of course be modified in a daily way as described in 7.11.10.1.

[Manage Day Popup, HANSON Thomas, 18/06/2012] [Activities] More... :

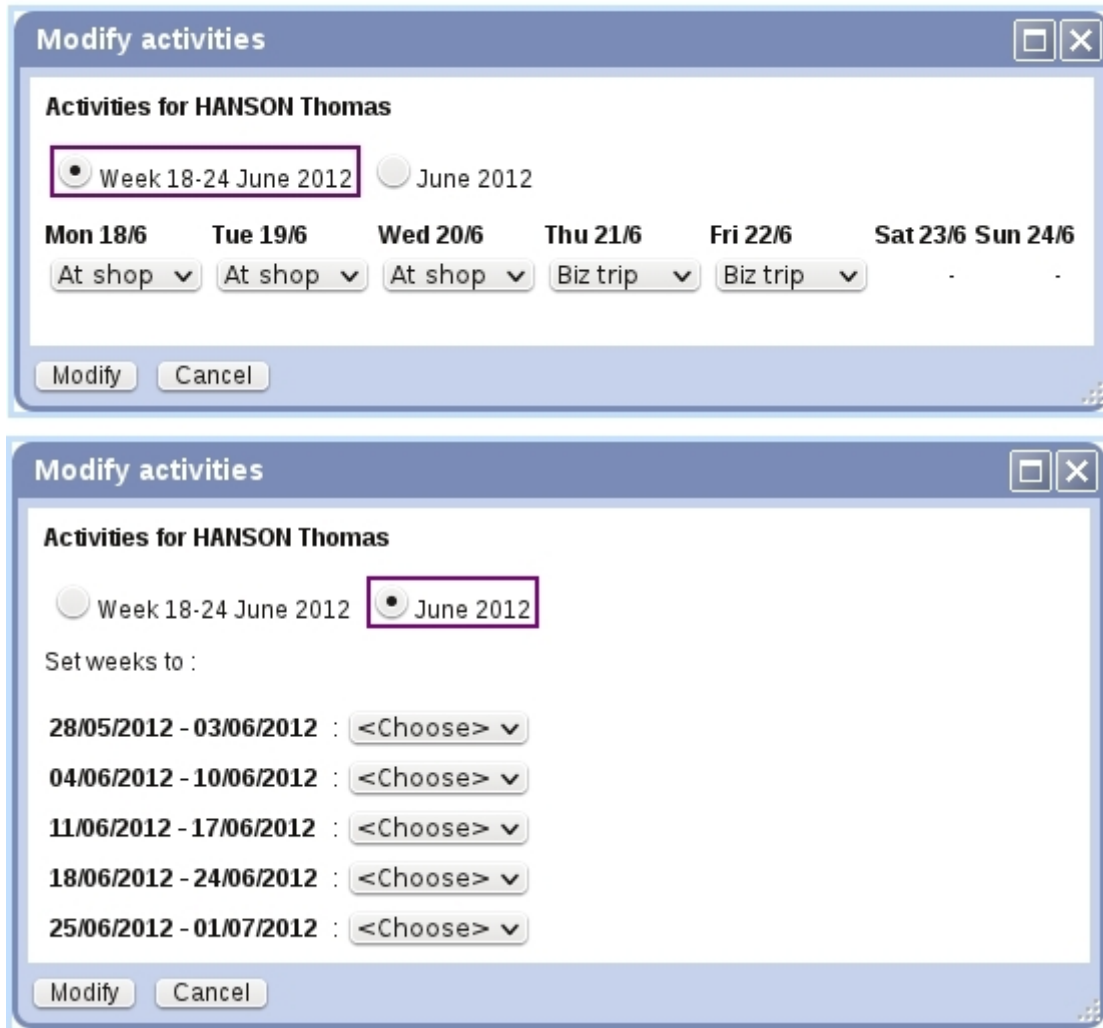


Figure 7.139: Setting activities for a whole week or a whole month.