



Guide for employees of the HR Department

First steps with **Redmine HRM Plugin**
<https://alphanodes.com/redmine-hrm>

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01

General

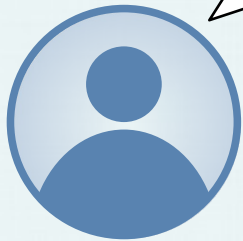
- Redmine HRM Plugin supports HR department employees and supervisors in their daily HR work.
- Both supervisors and HR employees have the possibility to manage all important processes via the HRM area, from the creation of new user accounts in Redmine, to the administration of existing accounts, the monitoring of attendance bookings, to vacation planning.



02

First steps

„Which basic functions are specifically relevant to my role as an employee in the HR department?“

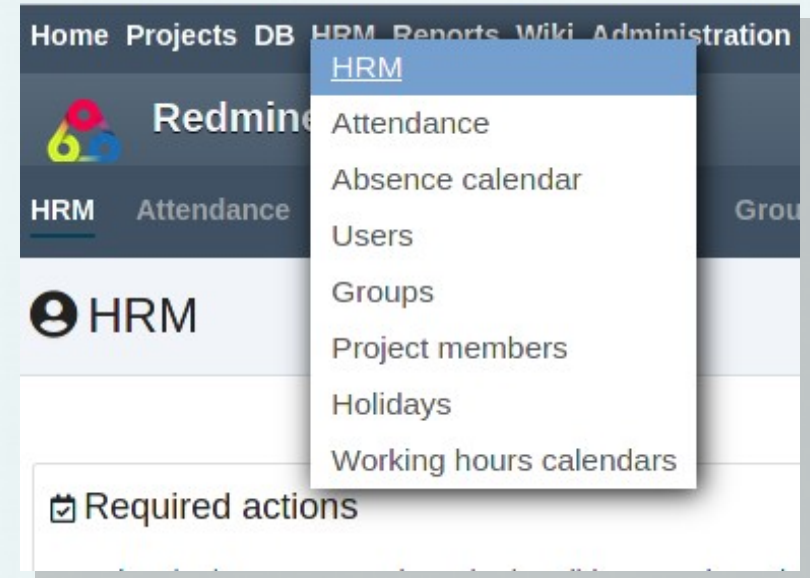


Klaus - HR Manager



02 / First steps / a) HRM area

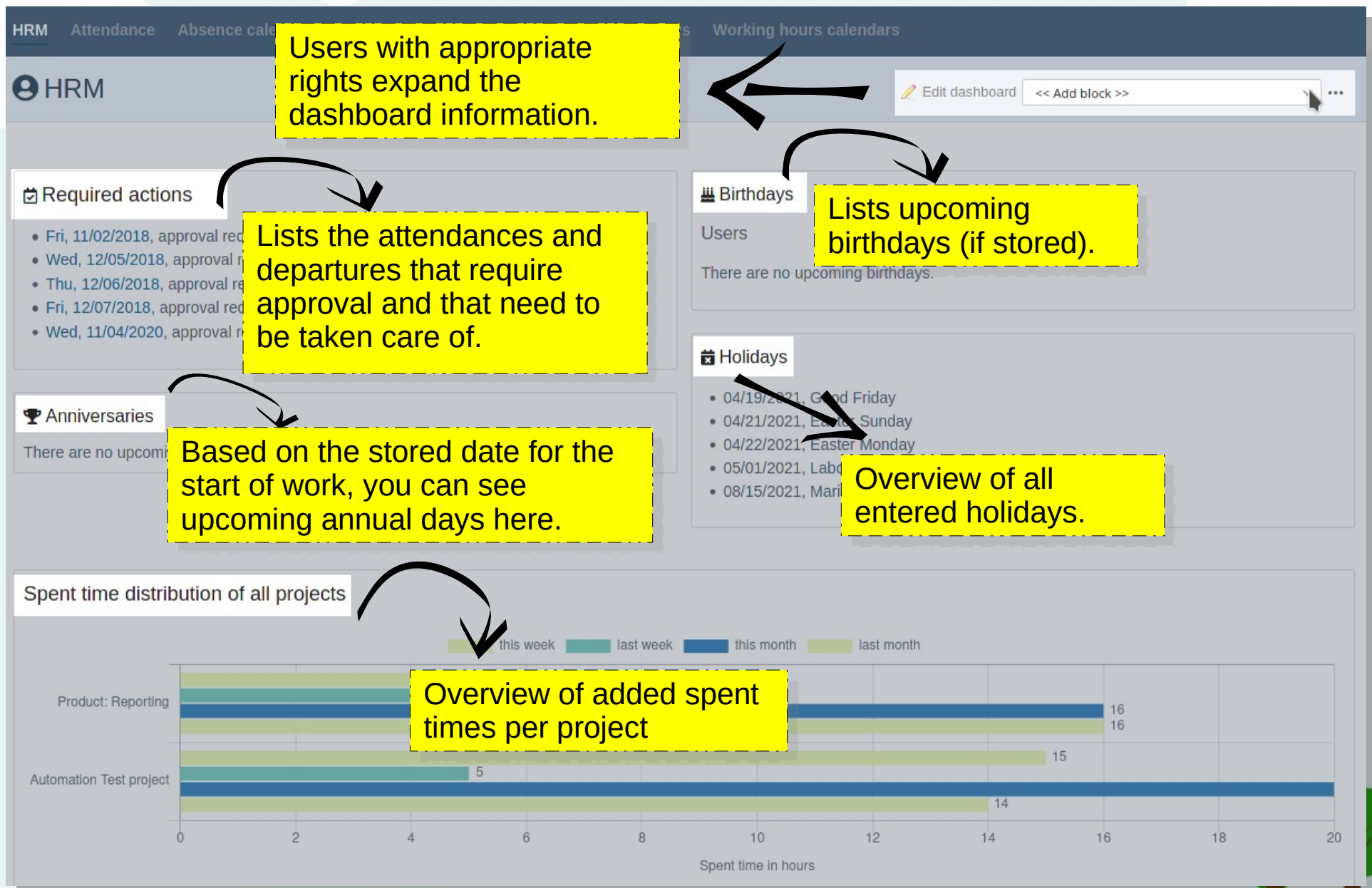
- Employees of the HR department have special permissions for access to **HRM**
 - First navigate to the **HRM** area.
 - This is usually accessible via the top menu.
-
- The **HRM** area provides you with an overview of the information relevant to you.
 - Depending on how many permissions your user has received in the Redmine system, you will see the following points here:
 - HRM
 - Attendance
 - Absence calendar
 - Users
 - Groups
 - Project members
 - Holidays
 - Working hours calendars



Contact your company wide Redmine Administrator in case of changes regarding your permissions here.



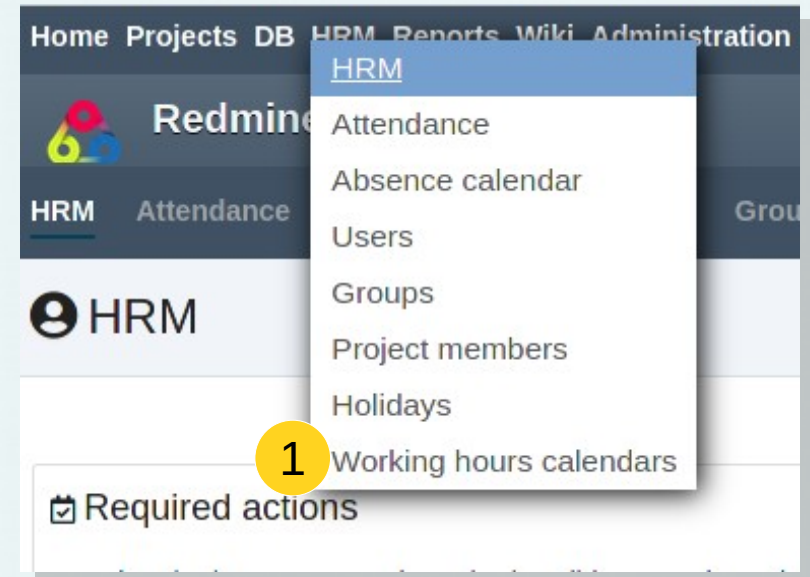
02 / First steps / b) HRM Dashboard




02 / First steps / c) Working hours calendars

1 First, navigate to the section **Working hours calendars**.

- This is usually accessible via the top menu.
- The **Working hours calendars** area is used to manage working times.
- Depending on which working time agreements exist for your employees in the company, the necessary working time calendars are created for this. These must be assigned to the respective users in Redmine, if they work for the company and / or the resource calculation is relevant.
- In this area the following tasks are done by you:
 - Create new working hours calendars
 - Edit existing working hours calendars
 - Delete unassigned working hours calendars
 - Filter for working hours calendars according to specific criteria (via available filter options)



 Depending on the permissions your user has, you can perform the activities mentioned here. Contact your internal Redmine administrator if necessary.

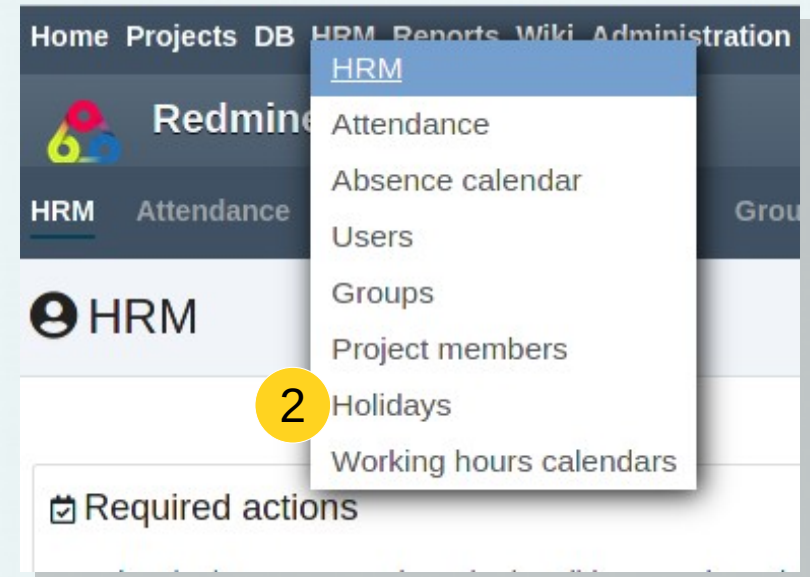



02 / First steps / d) Holidays

2 Afterwards navigate to the area **Holidays**.

- This is usually accessible via the top menu.

- The **Holidays** area is used to manage upcoming (e.g. legal) holidays. These are important for realistic resource planning and attendance / absence management.
- In this area the following tasks are done by you:
 - Create new holidays
 - Edit or delete existing holidays
 - „Tagging“ of regional holidays
 - Filter for holidays according to specific criteria (via available filter options)



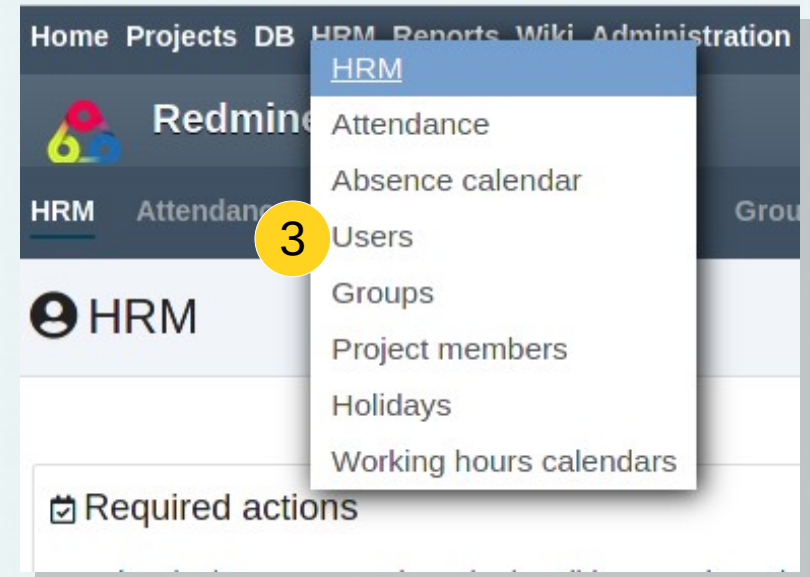
 Depending on the permissions your user has, you can perform the activities mentioned here. Contact your internal Redmine administrator if necessary.



02 / First steps / e) User overview

- 3 In this step you navigate to the **Users** area.
- This is usually accessible via the top menu.

- The **Users** area provides you with an overview of the existing user accounts in Redmine.
- In this area the following tasks are done by you:
 - Create new users
 - Edit existing users (e.g. assign working hours calendars, adjust vacation days, assign user types, adjust supervisors etc.)
 - Delete user accounts
 - Lock / Unlock user accounts
 - Search for users (via quick search)
 - Filter users according to specific criteria (via available filter options)



Depending on the permissions your user has, you can perform the activities mentioned here. Contact your internal Redmine administrator if necessary.



03 Reports

„Where can I view the recorded attendances and absences of my employees (e.g. Start, End, Duration)?“



Klaus - HR Manager

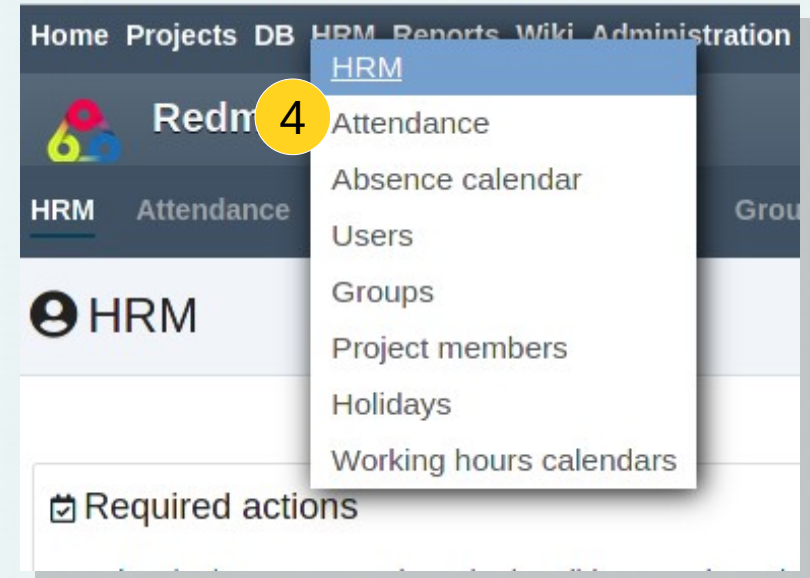


03 / Reports / a) Attendance bookings

4 Navigate to the **Attendance** area.

- This is usually accessible via the top menu.

- The attendance area provides you with an overview of the recorded attendances of all users who have been assigned an internal user type.
- In this area the following tasks are done by you:
 - Create a new attendance entry (for yourself, for another user)
 - Edit, approve / reject, delete existing entries
 - Filter for attendance according to personal criteria (via available filter options)
 - Select attendance periods (e.g. current month, last month, current year etc.)
 - List export to: CSV, XLSX, PDF



Depending on the permissions your user has, you can perform the activities mentioned here. Contact your internal Redmine administrator if necessary.

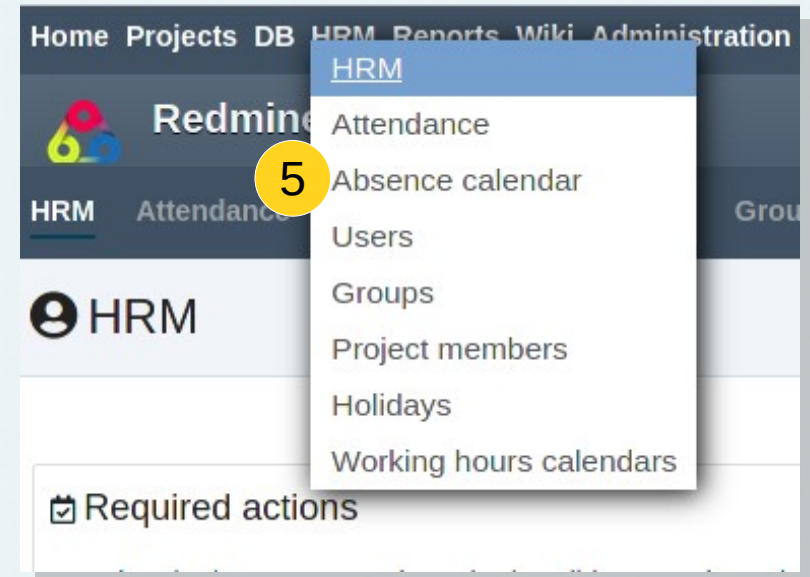


03 / Reports / b) Attendance entries (e.g. Vacation)

5 Navigate to the area **Absence calendar**.

- This is usually accessible via the top menu.

- The **Absence calendar** provides you with an overview of the entered absences of all users who have been assigned an internal user type.
- In this area the following tasks are done by you:
 - Display entries of the type attendance (selectable via add filter) in calendar view, which provides a monthly navigation (forward / back).



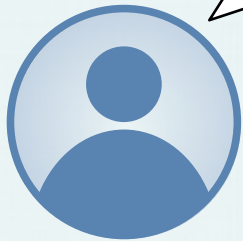
Depending on the permissions your user has, you can perform the activities mentioned here. Contact your internal Redmine administrator if necessary.



04

User profile

„How can I view the information of my employees?“



Klaus - HR Manager

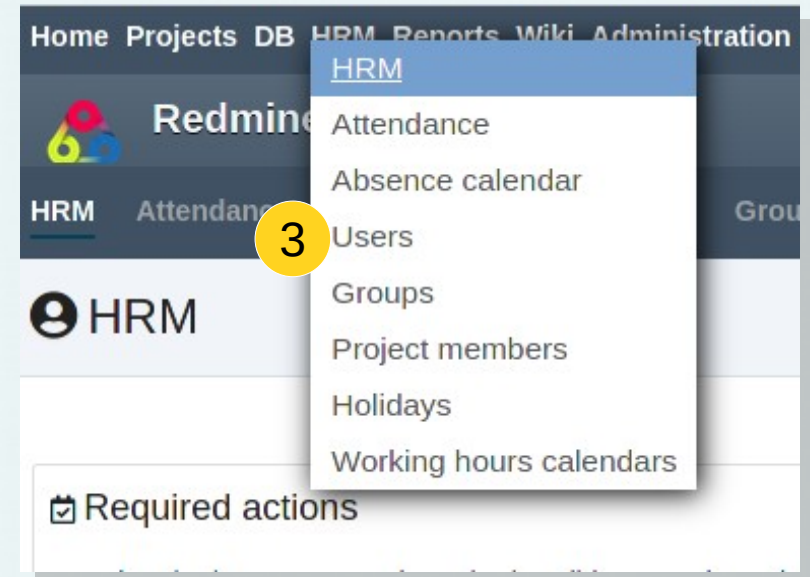


04 / User profile / a) User account

3 Navigate to the **Users** area.

- This is usually accessible via the top menu.

- The **Users** section gives you an overview of the existing user accounts in Redmine.
- Use the search or the filter options to search for the desired user.
- The user you are looking for can be accessed by clicking on the linked name. You will get to the respective user account.



Depending on the permissions your user has, you can perform the activities mentioned here. Contact your internal Redmine administrator if necessary.



04 / User profile / a) User account

The screenshot shows a user profile page for 'Henk Henk' (User #13). The page is divided into several sections:

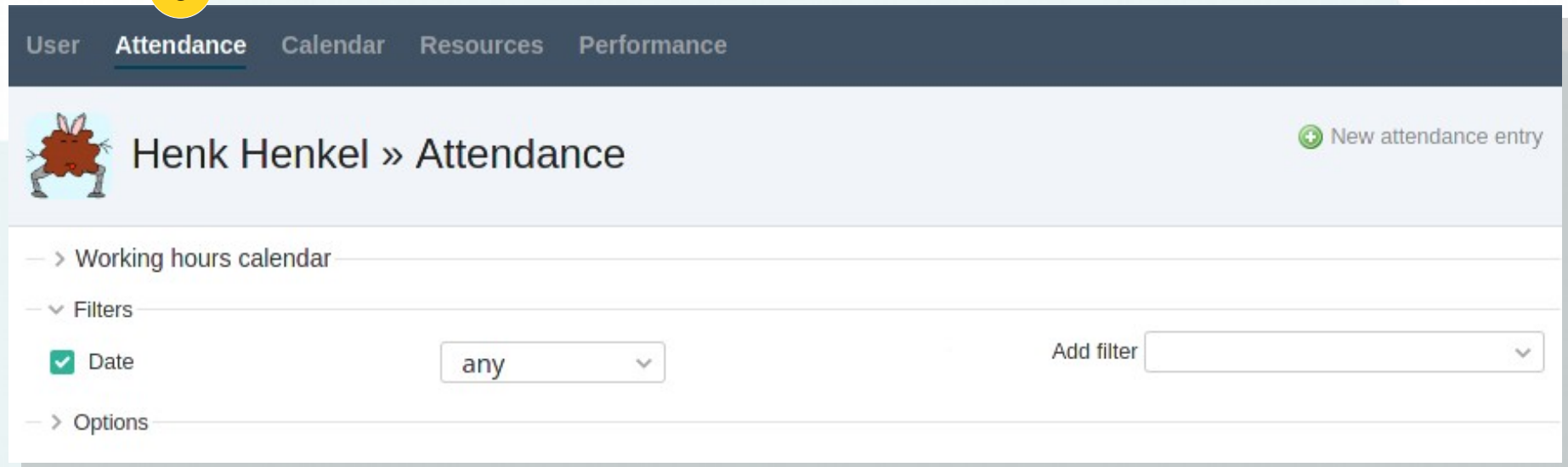
- Header:** 'User #13' with navigation links: User, Attendance, Calendar, Resources, Performance. Action buttons: Edit, New issue, Lock, Delete, Watch, Log.
- Profile Card:** User name 'Henk Henk', login 'Henk', email 'Henk@alphanodes.com'. Status: 'Present today: Yes', 'Registered on: 10/28/2018', 'Last connection: 10/31/2020 02:36 PM'.
- Information Panel:** Admin/User type: Default; Superiors: Susi Sonnenschein; Working hours calendar: Part time; Position: Marketing; Department: Creative Technology; Team: Team D; Skill set: Adobe, Analytics, Ansible, Kanban; Location: New York; Birthday: 10/31/1974.
- Activity Tab:** Activity, Files, Projects, Groups, Spent time, Assigned issues, Reported issues.
- Activity Feed:** A list of 'Automation Test project' entries with dates (Today, 03/09/2021, 03/08/2021, 03/06/2021, 02/20/2021) and descriptions.

Annotations with arrows point to:

- The 'User #13' header with the text: **Access to all user-related areas.**
- The 'Activity' tab with the text: **Access to all user-related content.**
- The 'Information' panel with the text: **Lists the information stored for the user from the user account.**

04 / User account / b) Attendances in user profile

6



The screenshot shows the 'Attendance' section of a user profile for 'Henk Henkel'. The navigation bar includes 'User', 'Attendance', 'Calendar', 'Resources', and 'Performance'. The 'Attendance' tab is active. Below the user's name and a 'New attendance entry' button, there are sections for 'Working hours calendar', 'Filters', and 'Options'. The 'Filters' section is expanded, showing a checked 'Date' filter with a dropdown menu set to 'any'. An 'Add filter' button is also visible.

6 Navigate in the user profile to the section **Attendance**.

- The Attendance area provides you with an overview of the:
 - working hours calendars assigned to the selected user.
 - Attendances / absences entered by the selected user.
 - to the attendance entries of the selected user that still have to be approved.
- Use the filter options to search for the entries you are interested in.
- The list can be exported to the following formats: CSV, XLSX, PDF
- Here you can also add attendance / absence entries for the corresponding user (e.g. on his behalf).
- The user himself also adds his attendances / absences in this area and creates his monthly attendance overview here.

Depending on the permissions your user has, you can view the information mentioned here. If necessary, contact your internal Redmine administrator.



04 / User account / b) Attendances in user profile: Working hours calendar

6

User **Attendance** Calendar Resources Performance

Henk Henkel » Attendance New attendance entry

Working hours calendar

	Workday start time	Workday end time	Working days	Hours a week
Part time	07:00 AM	11:00 AM	Mon, Tue, Wed, Thu	16

Attendance types

	Days per year	Spent (current / previous)
Office		0 / (0)
Illness		0 / (0)
Holiday	20	4 / (0)
Business related absence		0 / (0)
Unexcused absence		0 / (0)

Filters: Date: this month Add filter

Options: Apply Clear Save

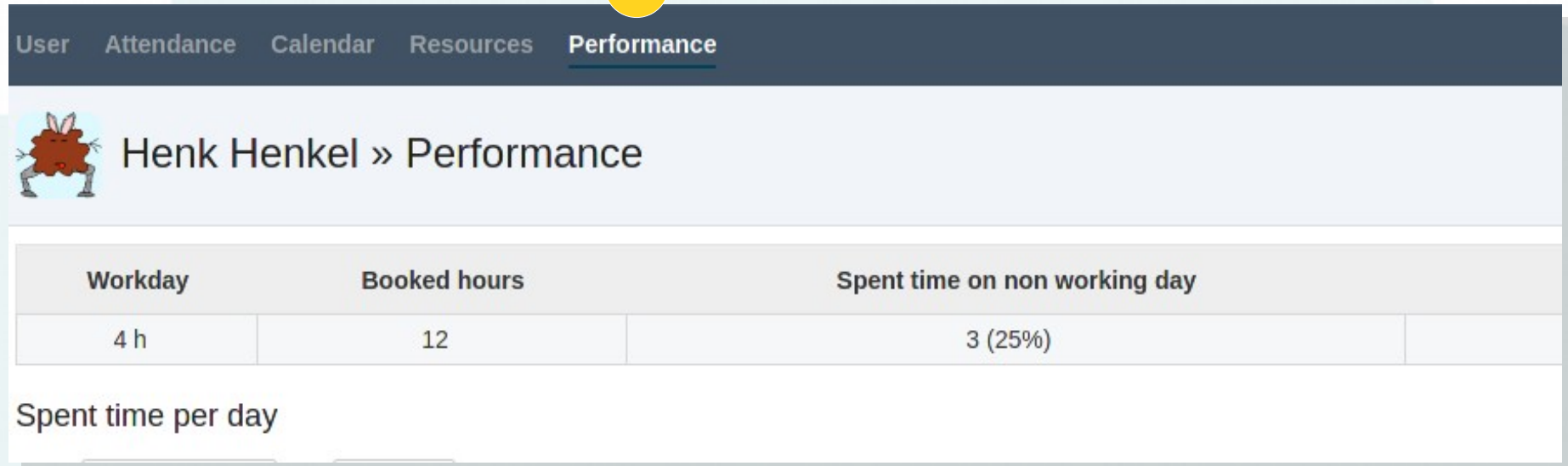
Half / full day: 4.0
Attendance: 60 Availability: 78.95%

6 In the user profile area **Attendance**, the section *Working hours calendar* provides insights into the defined working hours, entries requiring approval (e.g. vacation). Furthermore, you can also see the utilization of added attendances in relation to the selected period (e.g. overtime is displayed as a positive value, absences as a negative value).

Depending on the permissions your user has, you can view the information mentioned here. If necessary, contact your internal Redmine administrator.

04 / User account / c) Employee performance

7



The screenshot shows a navigation bar with 'User', 'Attendance', 'Calendar', 'Resources', and 'Performance' (highlighted). Below the navigation bar is a header for 'Henk Henkel » Performance' with a cartoon rabbit icon. A table displays performance metrics:

Workday	Booked hours	Spent time on non working day
4 h	12	3 (25%)

Below the table, the text 'Spent time per day' is visible.

7 Navigate in the user profile to the **Performance** area.

- In the **Performance** section you have the possibility to get an overview of the performance of the selected employee:
 - how many hours have his working day (according to the assigned working hours calendar).
 - how many hours were added in the selected display month.
 - how much time effort has been spent on non-working days.
 - is the working time exceeded / fallen short of.

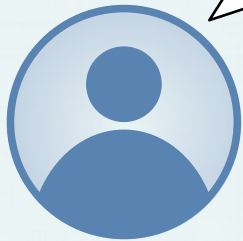
Depending on the permissions your user has, you can view the information mentioned here. If necessary, contact your internal Redmine administrator.



05

Add notes

„How can I store notes on an employee that only HR department employees have access to?“



Klaus - HR Manager



05 / Add notes (Step 1: add custom fields)

Custom fields » Users » New custom field

Format

Name *

Description

Min - Max length -

Regular expression
eg. ^[A-Z0-9]+\$

Text formatting

Default value

Required

Editable

Used as a filter

Visible to any users
 User types:
 Default
 External
 HR Manager
 Internal
(Attendance accounting)

Administration

- Projects
- Users
- Groups
- Roles and permissions
- Trackers
- Issue statuses
- Workflow
- Custom fields **8**
- Enumerations
- Settings
- LDAP authentication
- Additional
- Automation
- DB
- HRM
- Passwords
- Log
- Reporting
- Wiki Guide
- Tags
- Plugins
- Information

Create Create and add another


- 8 For additional information use the possibility to create additional custom fields for users. Depending on the visibility of the new fields, they can be viewed / used by all users, or only by certain user types.
- Let the task be done by a user (administrator) who knows how to do it. For notes you need a text field (format: long text).

Contact your internal Redmine administrator if needed. He should create the note field for internal employee notes with visibility for your user type in the administration area.

05 / Add notes (Step 2: Edit user account)

User #1

[Edit](#) [New Issue](#) [Delete](#) [Watch](#) [Log](#)


 **Redmine Admin**
Login: admin
admin@example.net

Present today: Yes
Registered on: 10/28/2018
Last connection: 03/10/2021 02:09 PM

[Activity](#) [Files](#) [Projects](#) [Groups](#) [Spent time](#) [Assigned issues](#) [Reported issues](#)

9 If the necessary custom fields exist (e.g. notes), then the information is stored in the respective user account via the edit link.

- The desired field should be visible for you there.
- Make sure that sensitive information can only be seen by the corresponding users.
- The information in these fields should only be visible to the appropriate user types who are involved in personnel administration.
- Other users should not be able to view the data.

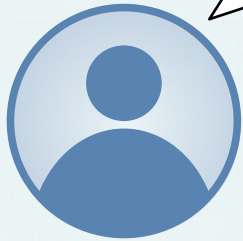
 Contact your internal Redmine administrator if needed. He should create the note field for internal employee notes with visibility for your user type in the administration area.



06

Vacation

„Where can I see who has recorded vacation?“



Klaus - HR Manager



06 / Vacation overview: Absence calendar

HRM Attendance **Absence calendar** Users Groups Project members Holidays Working hours calendars

Absence calendar **5** My attendance New attendance entry

Filters

- Status is active
- Attendance type is Holiday

Options


Month November Year 2020 Apply Clear

« October | December »

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
45	1 Fronleichnam	2 Albert Einstein 8.0	3 Albert Einstein 8.0	4 Albert Einstein 8.0 Jakob Schubert 6.0	5 Albert Einstein 8.0	6 Albert Einstein 8.0	7
46	8	9	10	11	12	13	14
47	15	16	17	18	19	20	21
48	22	23 Redmine Admin 8.0 Adam Ondra 8.0	24 Redmine Admin 8.0 Adam Ondra 8.0	25 Redmine Admin 8.0 Adam Ondra 8.0	26 Redmine Admin 8.0 Adam Ondra 8.0	27 Redmine Admin 8.0 Adam Ondra 8.0	28
49	29	30	1	2 Jakob Schubert 6.0	3	4	5

Also available in: ICS

5 Use the filter options of the *Absence calendar*. There you can display all registered absences of employees for a selected month with the appropriate *Attendance type* for vacation.

 Tip: In this view you can also list other absences (e.g. sick days).



06 / Vacation days: Attendance list

4

The screenshot shows the HRM Attendance interface. The navigation bar includes HRM, Attendance, Absence calendar, Users, Groups, Project members, Holidays, and Working hours calendars. The main title is "Attendance" with links for "My attendance" and "New attendance entry".

The filters section is highlighted with a yellow oval and contains the following settings:

- Filters:
 - Date: this year
 - Attendance type: is Holiday

Buttons for Apply, Clear, and Save are visible. The "Half / full day" summary is 17.0.

<input type="checkbox"/>	User	Date	Attendance type	Start	End	Duration	Half / full day	Approval	
▼ Henk Henkel 4 Half / full day: 4.0									
<input type="checkbox"/>	Henk Henkel	Today	Holiday				All day	<input checked="" type="checkbox"/>	...
<input type="checkbox"/>	Henk Henkel	Yesterday	Holiday				All day	<input checked="" type="checkbox"/>	...
<input type="checkbox"/>	Henk Henkel	Tue, 03/09/2021	Holiday				All day	<input checked="" type="checkbox"/>	...
<input type="checkbox"/>	Henk Henkel	Mon, 03/08/2021	Holiday				All day	<input checked="" type="checkbox"/>	...
▼ Redmine Admin 13 Half / full day: 13.0									
<input type="checkbox"/>	Redmine Admin	Fri, 05/14/2021	Holiday				All day	<input checked="" type="checkbox"/>	...
<input type="checkbox"/>	Redmine Admin	Thu, 05/13/2021	Holiday				All day	<input checked="" type="checkbox"/>	...
<input type="checkbox"/>	Redmine Admin	Wed, 05/12/2021	Holiday				All day	<input checked="" type="checkbox"/>	...
<input type="checkbox"/>	Redmine Admin	Tue, 05/11/2021	Holiday				All day	<input checked="" type="checkbox"/>	...
<input type="checkbox"/>	Redmine Admin	Mon, 05/10/2021	Holiday				All day	<input checked="" type="checkbox"/>	...

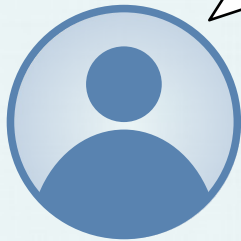
4 In the *Attendance* section, the filters help to display all registered absences of employees for the selected period with the appropriate *Attendance type* for vacation days.

- Group the view by user (options) to get a better overview of the vacation days booked per user. Use additional filters to further narrow the results if needed.

07

Other available information

„What information is available to me with the help of the user list?“



Klaus - HR Manager

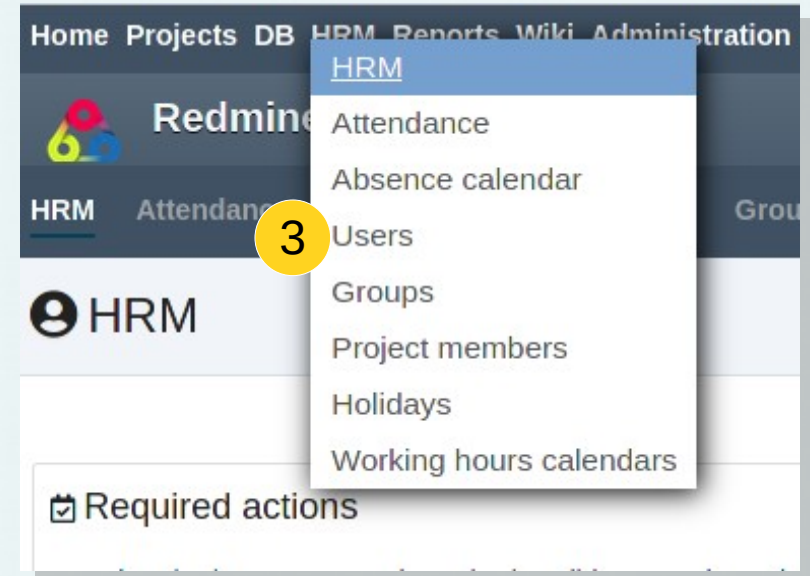


07 / Other available information: User list

3 Navigate to the area **Users**.

- This is usually accessible via the top menu.

- The **Users** area provides you with an overview of the existing user accounts in Redmine.
- By using the available filters and options, you can display a lot of user-related information in this area, such as:
 - Users who are not working today
 - Users with administration permissions
 - Recently created users
 - Users of a certain user type or group
 - Users assigned to a specific supervisor
 - Users who are obliged to add attendances
 - etc.



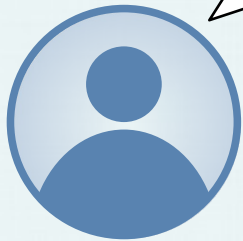
Depending on the permissions your user has, you can perform the activities mentioned here. Contact your internal Redmine administrator if necessary.



07

Other available information

„What information can I get from the attendance list?“



Klaus - HR Manager

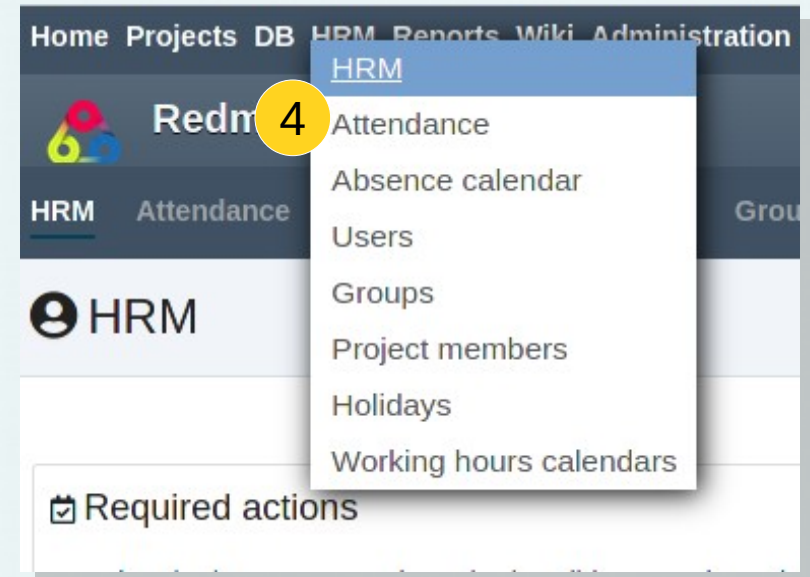


07 / Other available information: Attendance list

4 Navigate to the section **Attendance**.

- This is usually accessible via the top menu.

- The **Attendance** section provides you with an overview of the entered attendances of all users who have been assigned an internal user type.
- By using the available filters and options, you can display a lot of attendance-related information in this area, such as
 - Entries to be approved
 - approved / rejected entries
 - unapproved entries
 - entries of a specific user or author
 - entries of a specific attendance type
 - from when to when employees have worked
 - etc.



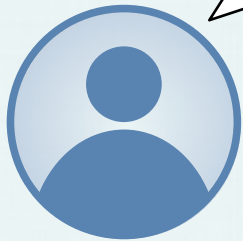
Depending on the permissions your user has, you can perform the activities mentioned here. Contact your internal Redmine administrator if necessary.



07

Other available information

„What information does the presence area provide me in the user profile?“

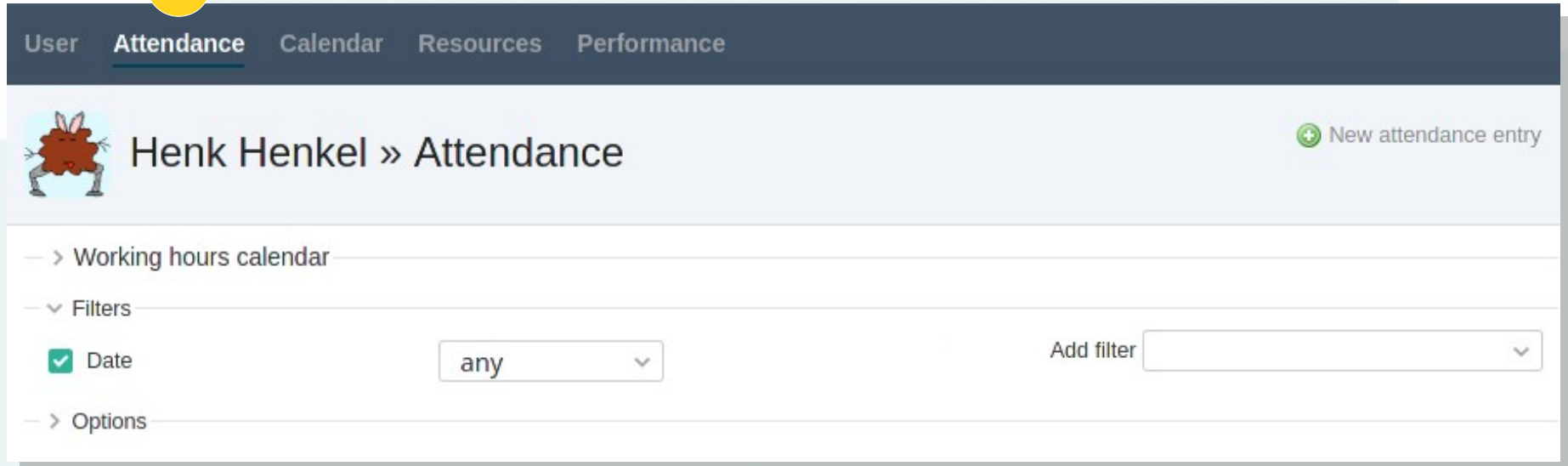


Klaus - HR Manager



07 / Other available information: User profile, attendance

6



The screenshot shows the Redmine user profile page for Henk Henkel, specifically the Attendance section. The navigation bar at the top includes 'User', 'Attendance' (which is underlined), 'Calendar', 'Resources', and 'Performance'. Below the navigation bar, there is a user profile card for Henk Henkel with a cartoon rabbit icon and a 'New attendance entry' button. Below the profile card, there are sections for 'Working hours calendar', 'Filters', and 'Options'. The 'Filters' section is expanded, showing a checked 'Date' filter with a dropdown menu set to 'any', and an 'Add filter' button with an empty dropdown menu.

6 Navigate to the **Attendance** section in the user profile.

- In the **Attendance** area, both the user himself and you as an employee from the HR department:
 - Insight into absences requiring approval according to the working time calendar (e.g. vacation days) and how many of them have been taken for the current year.
 - Insight into attendances / absences not subject to approval (e.g. illness, sabbatical, etc.)
 - Overview of the number of attendances expected by the user to be booked in the selected period. Including booked overtime, if available.
 - The possibility to book attendances / absences accordingly. Here you see from when to when the user has been working.
- Supervisors or employees of the HR department have here the possibility to approve / reject entries of the user that require approval
- Employees can compile their monthly attendance list here.
- etc.

Depending on the permissions your user has, you can view the information mentioned here. If necessary, contact your internal Redmine administrator.

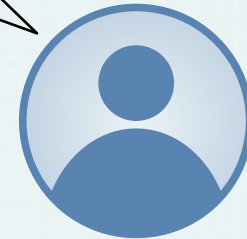


08

Tipp for usage

„How can I retrieve information once created again next month?“

„I work a lot with the filters and options in the lists for attendance and users. The "Save" function is useful here. It saves time next month.“



Petra - HR department



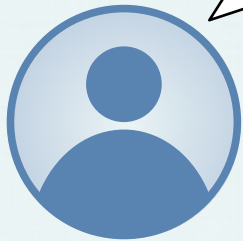
Klaus - HR Manager



09

Useful Add-Ons

„Which plugins support the HRM functionalities?“



Klaus - HR Manager



- Redmine Automation
 - Automate routine tasks and optimize existing data volumes. Create more time for real tasks through automated processes. With the Automation Plugin you can create time-controlled or trigger-controlled rules and automate certain HR processes accordingly, send individual notifications (e.g. onboarding mails, user / customer support), anonymize or delete data.
 - <https://alphanodes.com/redmine-automation>
- Redmine Wiki Guide
 - Most users want to solve problems or questions related to their job, a product or service themselves. Make it as easy as possible for them and thereby relieve your support, HR department, administrative staff or project managers. The attachment to the Redmine Wiki makes it a better self-service portal.
 - <https://alphanodes.com/redmine-wiki-guide>

