

HR work in Redmine

Working hours, absences and permissions with the HRM plugin - for employees and the HR department

 Handout for hosting customers, AlphaNodes GmbH, EN version
alphanodes.com/

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At a glance

For employees

What for Recording working time and absences, requesting leave, seeing your own calendar.

Can Book attendances and absences, including retroactively. Follow the status of requests. See your own figures. Chapters 2 and 3.

Cannot No payroll. Attendance is not the same as logging time on an issue. Approved entries can no longer be changed by you. Chapters 1 and 3.

Needs A user type marked as “internal”. Nothing else. Chapter 1.

Note Redmine does not notify you of a decision. The “Approval” column shows the status. Chapter 3.

First step Open your user account, Attendance area, and check whether mandatory booking applies to you.

For the HR department

What for Managing attendances of all internal users, deciding requests, maintaining working hours calendars, public holidays and users.

Can Approve and reject, book on behalf of others, set up calendars and holidays per region, create users. Chapters 7 to 10.

Cannot No payroll. No automatic carry-over of leave at year end. No calendar assignment from a cut-off date. Chapters 8 and 12.

Needs The HRM permission “View HRM”, plus “Manage users” for deciding. Superiors need no HRM permission. Chapter 11.

Note Changes to a working hours calendar apply retroactively to all reports. Redmine does not report pending requests on its own. Chapters 7 and 8.

First step Set up the “Required actions” dashboard block so that requests do not sit unnoticed.

1. The essentials first

The HRM plugin manages working hours, attendances, absences and the permissions that go with them in Redmine. It does not replace a payroll system.

This handout has two parts. **Part A (chapters 2 to 5)** is for all employees: booking time, requesting leave, reading your own calendar. **Part B (chapters 6 to 11)** is for the HR department: approvals, working hours calendars, public holidays, users and permissions.

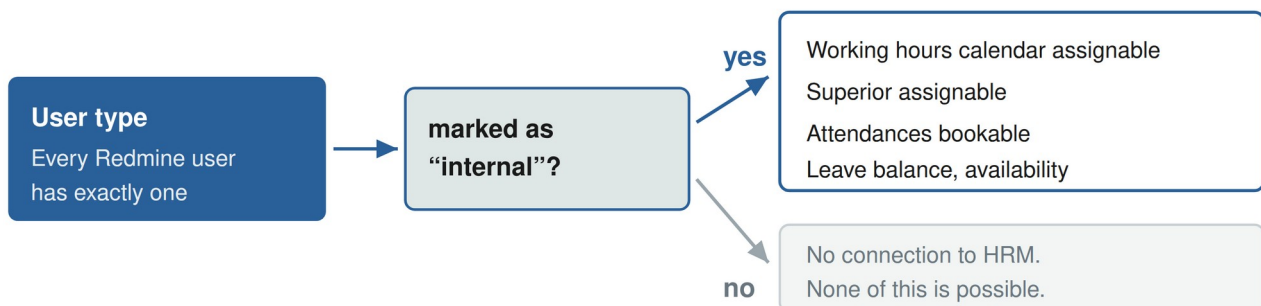
All descriptions refer to Redmine 7 with the HRM plugin by AlphaNodes GmbH from version 4.6.0 onwards.

One switch decides everything: “internal”

Every Redmine user has a **user type**. If that type is marked as **internal**, the user takes part in HRM. Only then can they

- be given a working hours calendar,
- be assigned a superior,
- book attendances.

If the type is not marked as internal, the user has nothing to do with HRM. Typically: employees are internal, customers are not.



The “internal” mark is set by the administration on the user type, not on the individual user.

Example: employees are internal, customers are not. Freelancers must be internal too if they are to be planned.

Figure 1: The user type decides whether somebody takes part in HRM. Without the “internal” mark there is no working hours calendar, no superior and no attendance booking.

Almost every support question along the lines of “why can't I book time” or “why doesn't this person show up” comes down to this: the user type is not marked as internal.

Two kinds of booking that have nothing to do with each other

Redmine has two kinds of time booking, and they are regularly confused.

	Attendance (HRM)	Spent time (time tracking)
What is booked?	Working time, leave, sickness	Time on an issue or project
Where?	User account, Attendance area	Issue, log time
What for?	Attendance, leave balance, availability	Project reporting, invoicing

Both run side by side. Anyone who has been logging time on issues carries on exactly as before.

2. Your attendance

You will find your attendance in your own user account in the **Attendance** area. It shows your working hours calendar, the attendance types available to you and your existing bookings.

Mandatory booking: the decisive difference

Whether you have to book daily depends on your user type. If in doubt ask the HR department - or check whether Redmine points out missing bookings to you.

With mandatory booking you record your attendance or absence on every working day. Redmine shows missing bookings from the last 30 days in the Attendance area and additionally on the start page in the *My attendance* info box.

Without mandatory booking you only record absences: leave, sickness, training. Redmine calculates your working time from the working hours calendar. Voluntary attendance bookings are allowed, but they only change the figures if they deviate from the calendar - overtime, for example.

The two figures: attendance and availability

Both always refer to the period selected at the top, by default the current month.

With mandatory booking

Attendance	0 (-160)
Availability	0 %
start of month, nothing booked yet	

Without mandatory booking

Attendance	160 (0)
Availability	100 %
calculated from the working hours calendar	

The value in brackets is the deviation from the hours your working hours calendar expects.

0 (-160) nothing booked	160 (0) target reached	168 (+8) overtime
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Example for a month with 160 expected hours. Leave and sickness reduce availability.

Figure 2: The same person, two modes of operation. With mandatory booking the figures stay at 0 until the first booking; without it Redmine calculates them from the working hours calendar.

Attendance is the sum of your hours. The value in brackets after it is the deviation from the working hours calendar. At the start of a month with mandatory booking it reads 0, with the hours expected for that month in brackets as a negative value. That is normal, not an error.

Availability is a percentage. 100 per cent means the hours expected by the calendar have been reached. Leave and sickness reduce the value.

Hovering over either figure shows a breakdown.

What you can book

Which attendance types are available to you is defined by the HR department. Types with a limit - leave with 30 days, for example - also appear in the overview with your balance. Types without a limit can be booked but do not appear in the overview.

Depending on the type you book a full day, half a day or a period from-to.

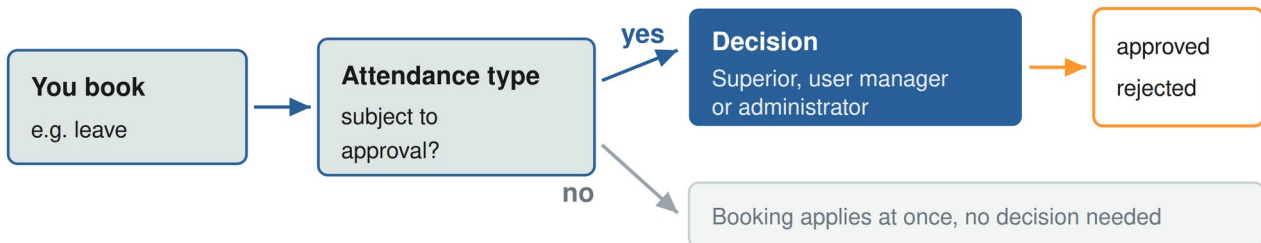
3. Leave and other absences

You create an absence in the Attendance area via **New attendance entry**.

Field	What goes in it
User	Yourself. Only with the corresponding permission can you book for others.
Attendance type	Leave, sickness, office, training - depending on your configuration.
Date	The day of the absence.
Period	Full day, morning, afternoon or from-to. Depends on the type.
Approval	You only see this if you are allowed to approve yourself.
Description	Optional. When rejecting an entry, the reason belongs here.

When approval is required

That depends on the attendance type, not on you. Leave is typically subject to approval, an office booking is not. Some types only require approval if the booking falls outside your working hours.



Until a decision is made you can still change or delete your entry - afterwards you cannot.

There is no notification. The "Approval" column in your attendance list shows the status.

Figure 3: How a booking subject to approval proceeds. As long as no decision has been made you can still change the entry - afterwards you cannot.

Allowed to decide: your assigned superior, users with the HRM permission *Manage users*, and administrators.

Finding out the result

Redmine does not send you a message about the decision. You can see the status as an icon in the *Approval* column of your attendance list. If you would rather not keep checking, save a filter (*Date: current year, Approval is not: approved*) as a **counter box** with threshold 1. The box then only appears while something is pending.

Changing an entry afterwards

You can edit or delete your own entry **as long as it has not been approved**. After that the HR department or your superior takes over. Retroactive bookings are possible, so you can still enter a sick day after the fact.

4. Your calendar

In your user account, the **Calendar** area shows your attendances and absences together with the issues assigned to you. Public holidays and non-working days are marked, depending on your working hours calendar.

The **absence calendar** in the HRM area shows the same for all employees - but only authorised users can see it, see chapter 5.

5. Who can see your data

Your attendances are not public. They can be seen by:

- **You.**
- **Your assigned superior**, if one is set.
- **The HR department**, more precisely: users with the HRM permission *View HRM*, and administrators.

Your bookings are not visible to ordinary colleagues.

One exception often comes as a surprise: if you are absent today, this is marked on **task board cards** for your issues. All that is visible is that you are absent, not the reason.

6. The HRM area

The HRM area sits in the top menu and is reserved for users with the *View HRM* permission and for administrators. Depending on permissions it contains:

- **Attendance** - all bookings by all internal users, filterable and storable
- **Absence calendar** - a monthly view across all employees
- **Users and groups**
- **Project members**
- **Public holidays** and **working hours calendars**

What changed with Redmine 7

The former separate HRM user list is gone. The HRM and Redmine user lists have been merged into **one** list; the old address */hrm/users* has been removed. You now work in the regular user administration, where the HRM columns and filters are available.

Further changes: the resource view has been rebuilt and the treemap display has been dropped. Public holidays no longer apply globally but per working hours calendar (chapter 9). All icons were migrated from FontAwesome to Tabler.

7. Processing approvals

Approval is available to anyone with the HRM permission *Manage users*, to anyone assigned as a superior, and to administrators.

An entry is set to *approved* or *not approved* via the edit link. When rejecting, the reason belongs in the description field.

Finding pending approvals

Redmine does not notify you on its own. Set up one of the following displays - otherwise requests will sit there.

Option	What it shows	Where
Dashboard block <i>Required actions</i>	List of pending bookings awaiting approval	HRM overview, Redmine start page

Option	What it shows	Where
Custom query as a counter box	Number of pending requests, only visible above a threshold	HRM overview, Redmine start page
Dashboard block <i>Query: attendance</i>	The pending requests as a list	HRM overview, Redmine start page

In addition, the attendance type can be configured so that the superior is informed by email.

8. Working hours calendars

A working hours calendar describes a working time agreement: working days per week, hours per day, start and end. Create one per agreement - full time, part time 50 per cent, working student - and assign it to your users.

What matters for HR work are the working days, the hours and the tag used for assigning public holidays (chapter 9). The *velocity* and *maximum issue assignment* fields control resource planning for project management and play no role in HR work.

Changes apply retroactively. The plugin does not store results, it recalculates on every request - and always with the **currently** assigned calendar, including for past months. A changed or swapped calendar therefore changes the figures for the entire period. Overtime can shift or disappear. This cannot be undone.

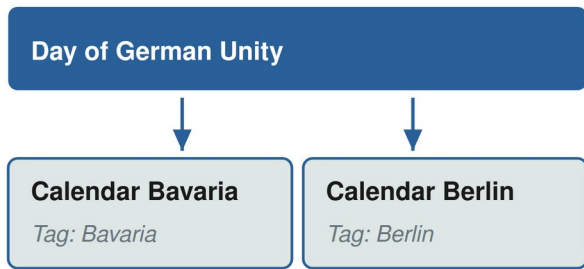
Two rules follow from this. **Never change an existing working hours calendar**; create a new one and assign it instead, otherwise the change hits every user of that calendar. And **export your reports first** if the history matters: export attendances, note the cut-off date (“full time until 31 March, part time 20h from 1 April”), and inform the people affected.

The *internal* mark on the user type needs the same care, see the questions in chapter 12.

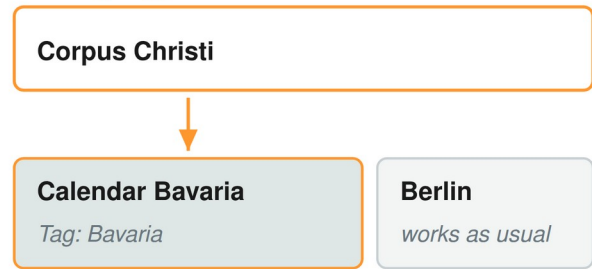
9. Public holidays

Public holidays are linked to working hours calendars via **tags**. This link is where things go wrong in practice.

Holiday without a tag



Holiday tagged "Bavaria"



Without a tag the holiday applies to every working hours calendar. With a tag only to calendars carrying it.

So the day off depends on the assigned calendar, not on which region somebody sits in.

Figure 4: A public holiday without a tag applies to every calendar. A tagged holiday only applies to calendars carrying the same tag.

The rule in two sentences: a public holiday **without a tag** applies nationwide, that is to every working hours calendar. A public holiday **with a tag** - "Bavaria", for example - only applies to working hours calendars carrying that same tag.

Public holiday	Tag on the holiday	Applies to
Day of German Unity	none	all working hours calendars
Corpus Christi	Bavaria	only calendars with the tag Bavaria
Reformation Day	Saxony	only calendars with the tag Saxony

Whether somebody has the day off therefore depends on the assigned working hours calendar, never on the holiday existing somewhere in the system. An employee in Bavaria needs a calendar with the tag "Bavaria", otherwise Corpus Christi is an ordinary working day for them.

With several locations this means: one working hours calendar per region, even if the working hours are identical.

10. Adding new employees

The order matters, because each step builds on the previous one.

1. **Create the user** in the user administration, as usual in Redmine.
2. **Assign the user type.** The type must be marked as *internal*, otherwise none of the following steps will work.
3. **Assign the working hours calendar** - the right one for working hours and region.
4. **Assign a superior**, if requests are to be approved.
5. **Set the leave entitlement**, if it differs from the default.
6. **Assign roles and projects.** This is regular Redmine work and has nothing to do with HRM.

A superior is any Redmine user. They need **no** HRM permission. The assignment alone lets them view, book, approve and reject attendances for their employees and see their calendars.

Review the role permission *user visibility* for this. We recommend *members of visible projects*. If it is set too broadly, a superior will also see attendances of people they are not responsible for.

11. User types and permissions

HRM permissions belong to the **user type**, not to the role. That is the difference from the rest of Redmine and the most common mix-up.

Everything in the HRM area

View HRM

Attendances, calendars, users, groups, holidays



Manage

Users · groups · working calendars
Holidays

Individually, without HRM area

View attendance · View superiors
View groups

Superior

No HRM permission needed. Views, books and approves for the assigned employees.

HRM permissions belong to the user type, not the role. "Manage users" also allows approving.

Figure 5: "View HRM" is the umbrella switch. The three individual view permissions are meant for cases without HRM access; the four management permissions require "View HRM".

Permission	What it allows	Requires
View HRM	Access to the HRM area: all attendances, absence calendar, users, groups, project members, public holidays, working hours calendars, superiors	-
View attendance	See attendances of all visible users, without the HRM area	can be granted on its own
View superiors	See assigned superiors	can be granted on its own
View groups	See assigned groups	can be granted on its own
View admin/user type	See the user type and administrator flag	-
Manage users	Create, edit and lock users; approve attendances	View HRM
Manage groups	Create, edit and delete groups	View HRM
Manage working calendars	Create, edit and delete working hours	View HRM

Permission	What it allows	Requires
	calendars	
Manage holidays	Create, edit and delete public holidays	View HRM

The three permissions *View attendance*, *View superiors* and *View groups* are already included in *View HRM*. They can only be granted individually if *View HRM* is not set - otherwise they are disabled in the form.

Two limits

Manage users does not mean administrator. Anyone with this permission cannot create or change administrators, nor users who themselves carry HRM permissions. Users of their own type are excluded as well. Only an administrator can delete.

Superiors need no HRM permission. Anyone not responsible for HR administration needs no access to the HRM area. Being assigned as a superior is enough for approving.

Recommended start

Start minimal. For most companies three types are enough: **Internal** for permanent staff, **External** for freelancers, **Customer** for external parties with no HRM involvement.

Rename the existing *Default* type and configure it as your main type rather than creating new types for everyone.

Freelancers who are to be included in capacity planning must be marked as *internal* too, with their own working hours calendar.

12. Frequently asked questions

- **A user cannot book attendance.** Their user type is not marked as internal. See chapter 1.
- **According to the system, an employee worked on a public holiday.** Their working hours calendar does not carry the tag of that holiday. See chapter 9.
- **Do I have to book attendance if I already log time on issues?** Those are two separate things. Whether attendance booking is mandatory depends on the user type.
- **Why does my attendance read 0 at the start of the month?** With mandatory booking that is the normal state. The negative value in brackets is the number of hours expected that month.
- **Can I withdraw my leave request?** Yes, as long as it has not been approved. After that, talk to your superior or the HR department.
- **Who rejected my request, and why?** The reason is in the description field of the entry, provided one was given.

- **Can colleagues see my leave?** No. It is visible to you, your superior and the HR department. Task board cards only mark that you are absent.
- **A superior sees attendances of people they are not responsible for.** The role permission *user visibility* is set too broadly. See chapter 10.
- **We have several locations with different public holidays.** Create one working hours calendar per region and tag the holidays accordingly.
- **Why does an attendance type not appear for selection?** Its limit is set to 0, which blocks it. Empty means unlimited.
- **Can I switch the working hours calendar at any time?** Technically yes, at any time. But the new calendar then also applies to the **past**: a user always has exactly one calendar, there is no assignment from a cut-off date. All reports are recalculated on every request, so overtime and undertime shift or disappear. So before switching: settle the overtime balance, export attendances, document the cut-off date. The effect cannot be undone.
- **Are untaken leave days carried over into the next year?** No. On 1 January the count starts at 0 again, and the previous year's balance is no longer visible in the system. If you let people carry leave over, you have to note the balance **before the turn of the year** and take it into account in the user's leave entitlement afterwards. This is a fixed date for the HR department, not an automatic process.
- **How do I map parental leave or a longer break?** Not through a different working hours calendar - that would recalculate the entire past. Use a dedicated attendance type for the period instead.
- **What happens when a user switches from internal to non-internal?** They lose the link to the working hours calendar and with it the basis of their booked attendances and absences. Switching to internal assigns them the default calendar. This change does not belong in a production system without preparation - neither on an individual user nor on a user type that many users depend on.

13. Next steps

- **For employees:** open your user account, Attendance area, and check whether mandatory booking applies to you.
- **For the HR department:** set up the *Required actions* dashboard block on the HRM overview so that requests do not sit unnoticed.
- **Before rolling out:** define the user types, create working hours calendars per agreement and region, and tag the public holidays.
- **Going deeper:** the HRM plugin documentation describes every function in detail, including resource planning and reporting. It is updated regularly.
- **Questions:** raise a support ticket via the AlphaNodes customer area.