Workflow :- HMIS to HRMS Integration

1. **Login to HMIS (artemlc).**

2. **Create a New Employee:**

   - **Navigate to: HR >> Employee Map**

   - **Add the employee details.**

3. **Create User Login:**

   - **Go to: User >> User Login**

   - **Set up login credentials for the newly created employee.**

4. **Assign Roles/Rights:**

   - **Grant access to:**

     - **hr-frappe**

     - **roster**

5. **Test the User Login:**

   - **Log in using the new user's credentials.**

6. **Access Employee Dashboard:**

   - **Click on the hr-portal app.**

   - **It will redirect to the employee's dashboard.**

HRMS Functions

1. **Employee Records and Documentation**
   a. Login to HRMS
      i. Employee Dashboard
      ii. Overview → Employee
   - Create, view, and update employee profiles, including personal details such as name, contact info, address, and emergency contacts
   - **Roles Involved**
     - **Administrator (BMC Admin) :** Manage access rights and system-level document settings.
     - **HR Manager (Care Provider wise HR) :** Full access to view/edit all employee documents of their organization.
     - **Employee (Doctors, Nurses, etc.) :** Restricted access to view personal profile.

1-Dashboard.mp4

EMPLOYEE HIERARCHY:-
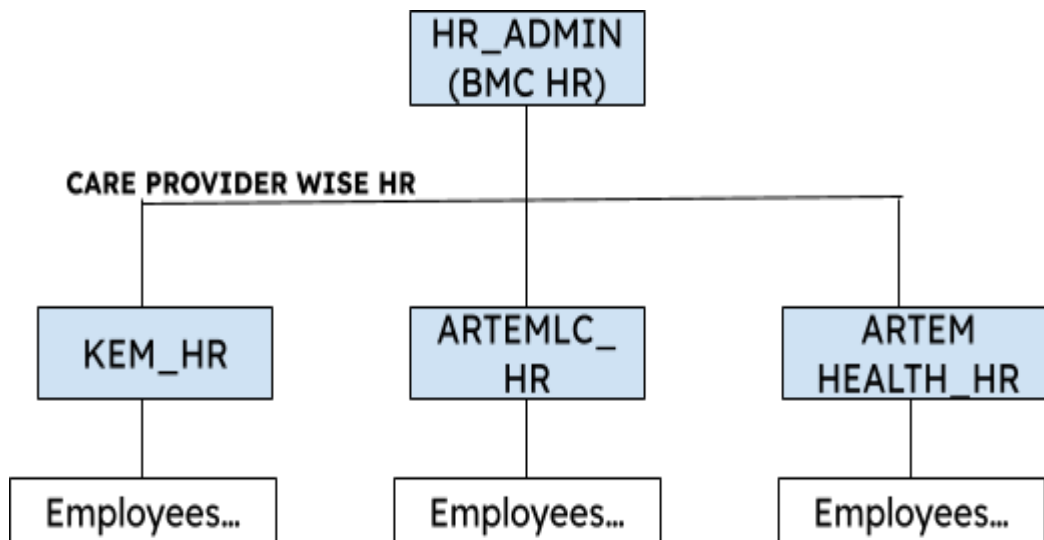
2. **Workforce Planning and Recruitment**
   a. Staffing needs & planning : Plan staffing, create job openings, track applicants, and manage interviews and feedback.
      i. Recruitment → Jobs → Staffing Plans
   b. Recruitment strategies : Create and publish job openings, and review applicant profiles.
      i. Recruitment → Jobs → Job Opening
      ii. Recruitment → Jobs → Job Applicant
   c. Interview process : Schedule interviews, collect interviewer feedback, and record results for candidates.
      i. Recruitment → Jobs → Interview
      ii. Recruitment → Jobs → Interview Feedback
      iii. Recruitment → Jobs → Interview Round
   d. Reference & background checks : Maintain and review candidate references and background verification details.
      i. Recruitment → Jobs → Employee Reference
   e. Onboarding : Assign onboarding templates, track status, and enable new hires to complete required tasks.
      i. Employee Lifecycle → Onboarding → Employee Onboarding Template
      ii. Employee Lifecycle → Onboarding → Employee Onboarding
   - Separate Dashboard to view open positions, track hiring status, and monitor overall recruitment progress.
   - **Roles Involved**
     - **HR Manager :** Oversees planning, approvals, and onboarding.
     - **New Employee :** Views and completes onboarding tasks.

2-Recruitement.mp4

3. **Training & Development**
    a. Training needs, design : Plan and create training events and programs based on role and skill requirements.
        i. Employee Lifecycle → Training → Training Event
        ii. Employee Lifecycle → Training → Training Program
        iii. Employee Lifecycle → Training → Training Result
    b. Professional development : Enhance employee skills through training events and review outcomes.
    c. Performance management : Set and review employee performance goals and appraisal results.
        i. Performance → Appraisal
        ii. Performance → Goal
- **Roles Involved**
    - **HR Manager :** Designs training programs, manages performance review cycles.
    - **Team Lead / Manager :** Recommends training, sets goals, and evaluates performance.
    - **Employee :** Views assigned training, sets goals, participates in appraisals.

3-Training.mp4

4. **Employee Benefits and Compensation**
    a. Benefits program : Manage employee benefit applications and approvals.
    b. Payroll & salary : Create payroll entries and process salary slips.
        i. Salary Payout → Payroll Entry
        ii. Salary Payout → Salary Slip
    c. Compensation structures : Maintain salary components, salary structures, incentives, and bonuses.
        i. Salary Payout → Incentives → Additional Salary
        ii. Salary Payout → Incentives → Retention Bonus
- **Pre-requisits**
    ○ Salary Component (Salary Payout → Masters → Salary Component)
    ○ Salary Structure (Salary Payout → Masters → Salary Structure)
    ○ Salary Structure Assignment (Salary Payout → Payroll → Bulk Salary Structure Assignment)
    ○ Payroll Period (Salary Payout → Masters → Payroll Period)
    ○ Salary Slip Format (ERPNext → Home → Letter Head)
- **Role Involved**
    ○ **HR Manager :** Configure salary structures, run payroll, manage benefits.
    ○ **Employee :** View salary slips, apply for benefits.

4-Compensation.mp

5. **HR Information Systems and Technology**
    a. HRIS : Maintain employee records within the core ERPNext HR module.
    b. Self-Service Portals (Employee Portal) : Enables employees to view/edit profiles, access pay slips, and apply for leave.
    c. Time and attendance : Maintain shift schedules, manage employee check-ins, and review attendance.
        i.   Shift & Attendance → Attendance
        ii. Shift & Attendance → Employee Check-in
        iii. Shift & Attendance → Shift Assignment → List View → Calendar View
    d. Leaves : Apply and manage leave requests, policies, and allocations.
        i.   Leaves → Leave Application
    ● **Pre-requisits**
        ○ **FOR SHIFT/ROSTER :**
        ○ Shift Type (Shift & Attendance → Shift → Shift Type)
        ○ Shift Location (Shift & Attendance → Shift → Shift Location)
        ○ Shift Schedule (Shift & Attendance → Shift → Shift Schedule)
        ○ Shift Assignment (Shift & Attendance → Shift → Shift Assignment)
        ○ **FOR LEAVE :**
        ○ Leave Type (Leaves → Setup → Leave Type)
        ○ Leave Period (Leaves → Setup → Leave Period)
        ○ Leave Policy (Leaves → Setup → Leave Policy)
        ○ Leave Policy Assignment (Leaves → Allocation → Leave Policy Assignment)
    ● **Role Involved**
        ○ **HR Manager :** Full control over all HRIS settings; can configure shifts, approve leaves, manage attendance.
        ○ **Employee :** Self-service access to view profile, apply for leave, view pay slips, and check attendance.
        ○ **Leave Approver :** Typically a reporting manager; receives and acts on leave requests from direct reports.

5-Leave.mp4