Software Requirements Document (SRD) – SaaS HRMS

Project Name: SaaS-based Human Resource Management System (HRMS)  
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# Document Control

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# 1. Introduction

## 1.1 Purpose

To define the requirements for implementing a scalable, secure, and user-friendly SaaS-based HRMS that addresses common organizational pain points and streamlines HR operations.

## 1.2 Scope

The HRMS will cover:

### Employee Lifecycle Management

Covers the entire journey of an employee within the organization — from hire to retirement:

* **Digital employee profiles** with personal, professional, and compensation details
* **Lifecycle events** like promotions, transfers, exits, and retirements
* **Document management** for contracts, ID proofs, and compliance records
* **Workflow automation** for approvals, updates, and notifications

### Recruitment & Onboarding

Streamlines talent acquisition and ensures smooth integration of new hires:

* **Job requisition and posting** across multiple platforms
* **Applicant tracking system (ATS)** with resume parsing and interview scheduling
* **Offer management** with digital acceptance and pre-boarding tasks
* **Onboarding workflows,** including welcome kits, training assignments, and policy acknowledgments

### Leave & Attendance

Automates time tracking and ensures compliance with leave policies:

* **Leave management** with configurable policies, accruals, and approvals
* **Attendance tracking** via biometric, mobile, or web check-ins
* **Holiday calendars** and shift scheduling
* **Integration with payroll** for accurate salary computation

### Performance Management

Empowers continuous feedback and structured evaluations:

* **Goal setting and alignment** with organizational objectives
* **360-degree feedback** from peers, managers, and subordinates
* **Periodic reviews** and performance scoring
* **Development plans** and training recommendations based on outcomes

### Analytics & Reporting

Delivers actionable insights for HR leaders and decision-makers:

* **Dashboards** for workforce demographics, attrition, and engagement
* **Custom reports** on payroll, attendance, recruitment metrics, etc.
* **Predictive analytics** for turnover risk, hiring needs, and productivity trends
* **Compliance reports** for audits and regulatory submissions

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# 2. Problem Areas & Mitigation Strategy

* **Unclear Requirements & Scope**
  + **Problem:** Misaligned expectations between HR, IT, and management
  + **Impact:** Wasted budget, unused features, missing critical functions
  + **Mitigation:** Conduct workshops, document “as-is” and “to-be” processes, and involve all stakeholders
* **Data Migration Issues**
  + **Problem:** Legacy data is inconsistent, incomplete, or stored in multiple formats
  + **Impact:** Errors in employee records; compliance risks
  + **Mitigation:** Audit and cleanse data, run pilot migrations, and maintain backups
* **Integration Challenges**
  + **Problem:** Difficulty connecting HRMS with ERP, attendance, and recruitment systems
  + **Impact:** Manual workarounds, data duplication, delays
  + **Mitigation:** Choose HRMS with strong API support, test in a sandbox, and involve the IT team early
* **Resistance to Change**
  + **Problem:** Employees are accustomed to old systems or manual processes
  + **Impact:** Low adoption, reverting to old methods, wasted investment
  + **Mitigation:** Create a change management plan, use demos, and involve HR champions
* **Insufficient Training**
  + **Problem:** Users lack understanding of system features
  + **Impact:** Underutilized system, increased support tickets
  + **Mitigation:** Provide role-specific training, maintain guides, and offer refresher sessions
* **Data Security & Compliance**
  + **Problem:** Sensitive data may be exposed; the system may not meet legal standards
  + **Impact:** Legal penalties, reputational damage
  + **Mitigation:** Use role-based access, select compliant vendors, and conduct regular audits
* **Unrealistic Timelines**
  + **Problem:** Aggressive deadlines without proper testing or training
  + **Impact:** Quality issues, user frustration, rework
  + **Mitigation:** Use phased rollout, begin with core modules, allocate time for UAT
* **Weak Change Management**
  + **Problem:** No structured approach to manage transition
  + **Impact:** Confusion, low morale, project failure
  + **Mitigation:** Assign a change manager, communicate the vision, and celebrate small wins
* **Scalability Issues**
  + **Problem:** System struggles to handle business growth and data volume
  + **Impact:** Reduced efficiency, increased IT burden
  + **Mitigation:** Choose scalable HRMS, ensure cloud-based architecture, and review performance regularly

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# 3. User Roles & Access Levels

## 3.1 Admin

**Scope:** System-wide control across all tenants or within a specific organization.

**Capabilities:**

* Configure modules (HR, Payroll, Recruitment, etc.)
* Manage user roles and permissions
* Set up integrations (e.g., accounting, attendance systems)
* Monitor audit logs and system health
* Manage subscription plans and billing (if tenant-level admin)

## 3.2 HR Manager

**Scope:** Department or organization-level HR operations

**Capabilities:**

* Access and update employee records
* Manage payroll cycles and salary structures
* Approve/reject leave and attendance
* Conduct performance reviews and appraisals
* Oversee recruitment workflows and onboarding

## 3.3 Employee

**Scope:** Self-service access to personal HR data

**Capabilities:**

* View and download payslips
* Apply for leave and check balances
* Update personal details (address, bank info)
* Submit reimbursement claims
* Access company policies and announcements

## 3.4 Recruiter

**Scope:** Talent acquisition and candidate management

**Capabilities:**

* Post job openings on portals and internal boards
* Track applications and candidate status
* Schedule interviews and send notifications
* Collaborate with hiring managers
* Generate recruitment analytics

## 3.5 Finance Officer

**Scope:** Payroll and compliance oversight

**Capabilities:**

* Generate payroll reports and tax filings
* Manage compensation structures and benefits
* Ensure statutory compliance (PF, ESI, TDS)
* Coordinate with HR for salary revisions
* Audit financial transactions related to HR

## 3.6 SaaS-Specific Considerations

| **Feature** | **Description** |
| --- | --- |
| **Multi-Tenant Isolation** | Each organization (tenant) has isolated data and user roles. |
| **Granular Permissions** | Roles can be customized per module (e.g., view-only for payroll, edit for Leave) |
| **Audit Trails** | Every action is logged for compliance and traceability. |
| **Role Templates** | Predefined role bundles for quick onboarding (e.g., “HR Executive”, “Payroll Analyst”) |
| **Custom Roles** | Admins can create hybrid roles with tailored permissions. |

# 4. Functional Requirements

## 4.1 Employee Management

This module forms the backbone of the HRMS, enabling centralized control over employee data.

* **Add/Edit/Delete Employee Profiles**
  + Create new employee records with personal, professional, and contact details.
  + Modify existing profiles (e.g., promotions, department changes)
  + Remove or deactivate profiles upon resignation or termination
* **Document Storage and Versioning**
  + Upload documents like resumes, ID proofs, contracts, and certifications
  + Maintain version history for updated documents (e.g., revised contracts)
  + Set access permissions for sensitive files
* **Organizational Hierarchy and Reporting Structure**
  + Define departments, teams, and reporting lines
  + Visualize org charts for clarity on roles and relationships
  + Enable role-based access based on hierarchy

## 4.2 Leave & Attendance

This module automates time-off management and attendance tracking.

* **Leave Request Workflows**
  + Employees submit leave requests via the portal or app
  + Multi-level approval workflows (e.g., manager → HR)
  + Notifications and status tracking for requests
* **Attendance Tracking via Biometric or Mobile App**
  + Integration with biometric devices (fingerprint, facial recognition)
  + GPS-based check-in/out via mobile app for remote workers
  + Real-time attendance dashboard for HR
* **Shift and Holiday Calendar Management**
  + Define shifts (day/night/flexible) and assign to employees
  + Maintain holiday calendars by region or department
  + Auto-adjust attendance based on holidays and shifts

## 4.3 Recruitment & Onboarding

Streamlines hiring and integrates new employees smoothly.

* **Job Requisition and Approval Workflows**
  + Managers raise requisitions with role, budget, and urgency
  + Approval chain involving department heads and HR
  + Track requisition status and history
* **Applicant Tracking System (ATS)**
  + Post jobs to internal and external platforms
  + Track applications, shortlist candidates, and schedule interviews
  + Maintain candidate database with resume parsing
* **Digital Onboarding Checklist and Document Collection**
  + Assign onboarding tasks (e.g., policy acknowledgment, training modules)
  + Collect documents digitally (e.g., PAN, Aadhaar, bank details)
  + Monitor onboarding progress and send reminders

## 4.4 Performance Management

Helps evaluate and improve employee performance.

* **Goal Setting and Tracking**
  + Define individual and team goals aligned with company objectives
  + Track progress with milestones and deadlines
  + Enable manager and employee collaboration on goals
* **Appraisal Cycles and Feedback Collection**
  + Configure appraisal periods (quarterly, annually)
  + Collect 360° feedback from peers, managers, and subordinates
  + Use rating scales, comments, and competency assessments
* **Performance Analytics Dashboard**
  + Visualize performance trends across departments
  + Identify high performers and training needs
  + Export reports for leadership review

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## 4.5 Employee Self-Service

Empowers employees with direct access to HR services.

* **View/Update Personal Info**
  + Edit address, contact number, and emergency contacts
  + Upload profile photo and update bank details
* **Submit Leave and Expense Claims**
  + Apply for leave and track approval status
  + Submit travel or business expense claims with receipts
  + Monitor reimbursement timelines
* **Access Payslips and Tax Documents**
  + Download monthly payslips and annual Form 16
  + View salary breakdown and tax deductions
  + Integrate with payroll for real-time updates

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# 5. Non-Functional Requirements

## 5.1 Security

Ensures protection of sensitive employee and organizational data.

* **Role-Based Access Control (RBAC):** Users are granted permissions based on their roles (e.g., Admin, HR Manager, Employee), ensuring that only authorized personnel can access or modify specific data.
* **Data Encryption:** All data—both at rest and in transit—is encrypted using industry-standard protocols (e.g., AES-256, TLS 1.2+) to prevent unauthorized access and data breaches.
* **Audit Logs:** Every action (e.g., login, data update, approval) is logged with timestamps and user identifiers to support traceability, compliance, and forensic analysis.

## 5.2 Scalability

Supports growth in users, data volume, and functionality without performance degradation.

* **Cloud-Native Architecture:** Built using microservices and containerization (e.g., Kubernetes, Docker), allowing seamless deployment and management across cloud platforms.
* **Horizontal Scaling:** The system can add more servers or instances to handle increased load, ensuring consistent performance during peak usage or expansion.

## 5.3 Availability

Guarantees system reliability and minimal downtime.

* **99.9% Uptime SLA:** The system is available and operational 99.9% of the time, ensuring business continuity.
* **Disaster Recovery:** Automated backups, geo-redundant storage, and recovery protocols ensure data can be restored quickly in case of failure.
* **Failover Support:** If one server or service fails, traffic is rerouted to standby systems to maintain uninterrupted access.

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## 5.4 Compliance

Ensures adherence to legal and regulatory standards.

* **GDPR (General Data Protection Regulation):** Protects personal data of EU-based employees, including consent management and data deletion rights.
* **ISO 27001 Certification:** Demonstrates commitment to information security management through standardized controls and audits.
* **Local Labor Laws:** The system accommodates region-specific HR policies, tax rules, and statutory benefits (e.g., PF, ESI in India).

## 5.5 Performance

Delivers a fast and responsive user experience.

* **<2s Response Time Under Peak Load:** Even during high traffic (e.g., payroll day), the system responds to user actions within two seconds, ensuring smooth interaction.
* **Optimized APIs and Caching:** Backend services are tuned for speed using caching layers and efficient database queries.

## 5.6 Maintainability

Facilitates easy updates, debugging, and feature enhancements.

* **Modular Architecture:** Each module (e.g., Payroll, Recruitment) is independently deployable and upgradable, reducing downtime and risk.
* **Version Control:** Codebase is managed with tools like Git, enabling rollback, branching, and collaborative development.
* **Easy Upgrades:** Updates are pushed automatically with minimal disruption, often using CI/CD pipelines for continuous delivery.

# 6. Integrations

## 6.1 ERP Systems (SAP, Oracle)

* **Purpose:** Synchronize HR data with enterprise-wide financial, procurement, and operations systems.
* **Benefits:**
  + Unified employee cost tracking and budgeting
  + Real-time updates to organizational structure and cost centers
  + Automated payroll accounting and benefits reconciliation
* **Integration Strategy:**
  + Use RESTful APIs or middleware connectors
  + Map employee master data, job codes, and compensation structures
  + Ensure bi-directional sync for HR and finance modules

## 6.2 Biometric Attendance Devices

* **Purpose:** Capture accurate time-in/time-out data for attendance and shift tracking.
* **Benefits:**
  + Eliminates manual entry errors and buddy punching
  + Real-time attendance logs for payroll processing
  + Supports compliance with labor laws and overtime policies
* **Integration Strategy:**
  + Connect biometric devices via secure APIs or SDKs
  + Sync attendance data with leave and payroll modules
  + Enable alerts for anomalies (e.g., missed punches, late arrivals)

## 6.3 Job Boards (LinkedIn, Naukri)

* **Purpose:** Automate job postings and candidate sourcing.
* **Benefits:**
  + Wider reach for recruitment campaigns
  + Faster applicant tracking and resume parsing
  + Improved candidate experience with branded job listings
* **Integration Strategy:**
  + Use ATS connectors or XML feeds for job publishing
  + Auto-import candidate profiles and application status
  + Enable analytics on source effectiveness and hiring funnel

## 6.4 Accounting Software (Tally, QuickBooks)

* **Purpose:** Align payroll and expense data with financial reporting systems.
* **Benefits:**
  + Accurate salary disbursement and ledger entries
  + Simplified tax filings and audit trails
  + Real-time reconciliation of HR expenses
* **Integration Strategy:**
  + Export payroll journals in compatible formats (e.g., CSV, JSON)
  + Automate salary components mapping to the chart of accounts
  + Schedule periodic syncs for financial closing

## 6.5 Communication Tools (Slack, Teams)

* **Purpose:** Enhance collaboration and streamline HR communications.
* **Benefits:**
  + Instant notifications for approvals, leave requests, and announcements
  + HR chatbot integration for employee queries
  + Facilitates remote onboarding and training sessions
* **Integration Strategy:**
  + Embed HRMS widgets or bots within Slack/Teams channels
  + Push alerts for workflow actions (e.g., pending approvals)
  + Enable calendar sync for interviews, reviews, and training

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# 7. Reporting & Analytics

## 7.1 Custom Report Builder

* **Functionality:**
  + Drag-and-drop interface to create tailored reports without coding
  + Filters for departments, locations, time periods, and employee attributes
  + Support for calculated fields, conditional formatting, and grouping
* **Use Cases:**
  + Generate reports on headcount trends, attrition rates, or training completion
  + Customize payroll summaries or leave balances by team or region
  + Build compliance reports for audits or regulatory filings

## 7.2 Real-Time Dashboards for HR Metrics

* **Functionality:**
  + Interactive dashboards displaying live data across HR functions
  + Visualizations like bar charts, pie charts, heatmaps, and KPIs
  + Drill-down capabilities to explore data at granular levels
* **Key Metrics Tracked:**
  + Employee turnover, hiring velocity, and time-to-fill
  + Attendance trends, leave utilization, and overtime
  + Performance distribution, goal progress, and training ROI
* **Benefits:**
  + Immediate visibility into workforce health and engagement
  + Enables proactive interventions and strategic planning

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## 7.3 Export Options (PDF, Excel)

* **Functionality:**
  + One-click export of reports and dashboards into PDF or Excel formats
  + Custom branding and formatting for stakeholder presentations
  + Scheduled or on-demand exports for offline access
* **Use Cases:**
  + Share monthly HR summaries with leadership
  + Prepare payroll data for finance reconciliation
  + Archive compliance reports for audits

## 7.4 Scheduled Report Delivery via Email

* **Functionality:**
  + Automate report distribution to predefined recipients
  + Set frequency: daily, weekly, monthly, or custom intervals
  + Include attachments or secure links with access controls
* **Use Cases:**
  + Deliver weekly hiring pipeline updates to recruitment leads
  + Send monthly attendance summaries to department heads
  + Notify HR leadership of anomalies (e.g., spike in resignations)

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# 8. UI/UX Requirements

## 8.1 Responsive Design for Desktop and Mobile

* **Objective:** Deliver a consistent and optimized experience across all screen sizes and devices.
* **Key Features:**
  + Adaptive layouts for desktops, tablets, and smartphones
  + Touch-friendly interfaces for mobile users (e.g., swipe, tap, scroll)
  + Offline access or caching for mobile apps in low-connectivity environments
* **Benefits:**
  + Enables HR tasks on the go (e.g., leave approvals, attendance logging)
  + Enhances accessibility for remote and field employees
  + Reduces dependency on desktop systems

## 8.2 Role-Based Dashboards

* **Objective:** Provide personalized views and workflows based on user roles.
* **Key Features:**
  + HR Admins: Access to full employee data, analytics, and compliance tools
  + Managers: Team performance, attendance summaries, approval workflows
  + Employees: Self-service for leave, payslips, and profile updates
* **Benefits:**
  + Improves task relevance and reduces clutter
  + Enhances productivity by surfacing key actions and insights
  + Supports secure access control and data privacy

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## 8.3 Custom Branding and Theme Support

* **Objective:** Allow organizations to tailor the look and feel of the HRMS to match their brand identity.
* **Key Features:**
  + Logo upload, brand color palette, and typography customization
  + Configurable landing pages and welcome messages
  + Theme presets for light/dark modes and accessibility preferences
* **Benefits:**
  + Strengthens internal brand consistency
  + Improves user engagement and familiarity
  + Enables white-labeling for multi-tenant deployments

## 8.4 Accessibility Compliance (WCAG 2.1)

* **Objective:** Ensure the platform is usable by individuals with disabilities, in line with global standards.
* **Key Features:**
  + Keyboard navigation and screen reader compatibility
  + High-contrast modes and scalable text
  + Alt text for images, ARIA labels for interactive elements
* **Benefits:**
  + Promotes inclusivity and equal access
  + Meets legal and ethical standards for digital accessibility
  + Enhances usability for an aging workforce and diverse user groups

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# 9. Testing & Rollout Plan

## 9.1 Unit Testing: Module-Level Validation

* **Objective:** Ensure each module functions correctly in isolation.
* **Scope:**
  + Validate core functionalities like employee profile creation, leave requests, payroll calculations, etc.
  + Check for input validation, error handling, and UI responsiveness.
* **Performed By:** Development and QA teams
* **Outcome:** Verified modules ready for integration

## 9.2 Integration Testing: API & Data Flow Checks

* **Objective:** Confirm seamless interaction between modules and external systems.
* **Scope:**
  + Test API connections with ERP, biometric devices, job boards, and accounting tools.
  + Validate data consistency across modules (e.g., attendance syncing with payroll).
  + Ensure real-time data flow and error-free communication between systems.
* **Performed By:** QA and IT teams
* **Outcome:** Stable, interconnected system with reliable data exchange

## 9.3 User Acceptance Testing (UAT): Stakeholder Validation

* **Objective:** Validate system usability and functionality from an end-user perspective.
* **Scope:**
  + HR, managers, and employees test workflows like onboarding, leave approvals, and performance reviews.
  + Collect feedback on UI, navigation, and feature relevance.
  + Identify gaps or enhancements before full deployment.
* **Performed By:** Selected business users and HR stakeholders
* **Outcome:** Approved system ready for rollout with user confidence

## 9.4 Phased Rollout: Gradual Deployment Strategy

* **Objective:** Minimize risk and ensure smooth adoption across departments.
* **Approach:**
  + **Phase 1:** Deploy core HR modules (employee records, attendance, leave)
  + **Phase 2:** Expand to payroll and compliance features
  + **Phase 3:** Introduce performance management, recruitment, and learning modules
* **Benefits:**
  + Allows focused training and support
  + Enables early feedback and iterative improvements
  + Reduces disruption to daily operations

## 9.5 Pilot Deployment: Controlled Group Testing

* **Objective:** Test the system in a real-world environment with a limited user base.
* **Scope:**
  + Select a small group (e.g., one department or location) for early access
  + Monitor usage, collect feedback, and resolve issues
  + Validate system readiness for broader rollout
* **Benefits:**
  + Identifies unforeseen challenges before full launch
  + Builds internal champions and reference users
  + Enhances confidence in system stability

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# 10. Training & Support

## 10.1 Role-Specific Training Sessions

* **Purpose:** Tailor learning experiences to the unique needs of HR professionals, managers, and employees.
* **Approach:**
  + HR teams receive deep-dive sessions on workflows like recruitment, payroll, and compliance.
  + Managers are trained on performance reviews, team analytics, and approvals.
  + Employees learn how to use self-service features for leave requests, attendance, and profile updates.
* **Format:** In-person workshops, virtual classrooms, and on-demand video tutorials
* **Outcome:** Confident users who understand their responsibilities and system capabilities

## 10.2 Interactive Demos and Webinars

* **Purpose:** Provide hands-on exposure to system features in a guided, engaging format.
* **Approach:**
  + Live walkthroughs of modules like onboarding, performance management, and analytics
  + Scenario-based demos to simulate real-world tasks and decision-making
  + Webinars hosted by product experts with Q&A sessions for clarification
* **Frequency:** Weekly during rollout, then monthly for updates and new features
* **Outcome:** Increased familiarity, reduced learning curve, and proactive engagement

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## 10.3 Knowledge Base and FAQs

* **Purpose:** Offer a self-service repository for quick answers and troubleshooting.
* **Contents:**
  + Step-by-step guides for common tasks (e.g., applying for leave, updating profiles)
  + FAQs addressing system navigation, permissions, and error messages
  + Searchable articles with screenshots, tips, and best practices
* **Access:** Embedded within the HRMS dashboard and mobile app
* **Outcome:** Reduced dependency on support teams and faster issue resolution

## 10.4 Helpdesk and Ticketing System

* **Purpose:** Provide structured, responsive support for technical and functional issues.
* **Features:**
  + Multi-channel support: email, chat, and phone
  + Ticketing system to log, track, and prioritize user issues
  + SLA-based resolution timelines and escalation protocols
  + Analytics on support trends to identify training gaps or system improvements
* **Outcome:** Streamlined issue resolution with improved accountability, faster response times, and actionable insights for continuous support enhancement.