Helping Enterprises Level Up

BUDGIE

APRIL 2023

PREPARED BY

HEMA'S ENTERPRISES PRIVATE LIMITED

DOCUMENT REVISION:

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Project Objective

Budgie is an integrated HR platform that automates HR processes such as hiring, core transactions (leaves, attendance), payroll, employee movement, engagement, and data analytics. By streamlining all HR processes, Budgie engages & empowers employees

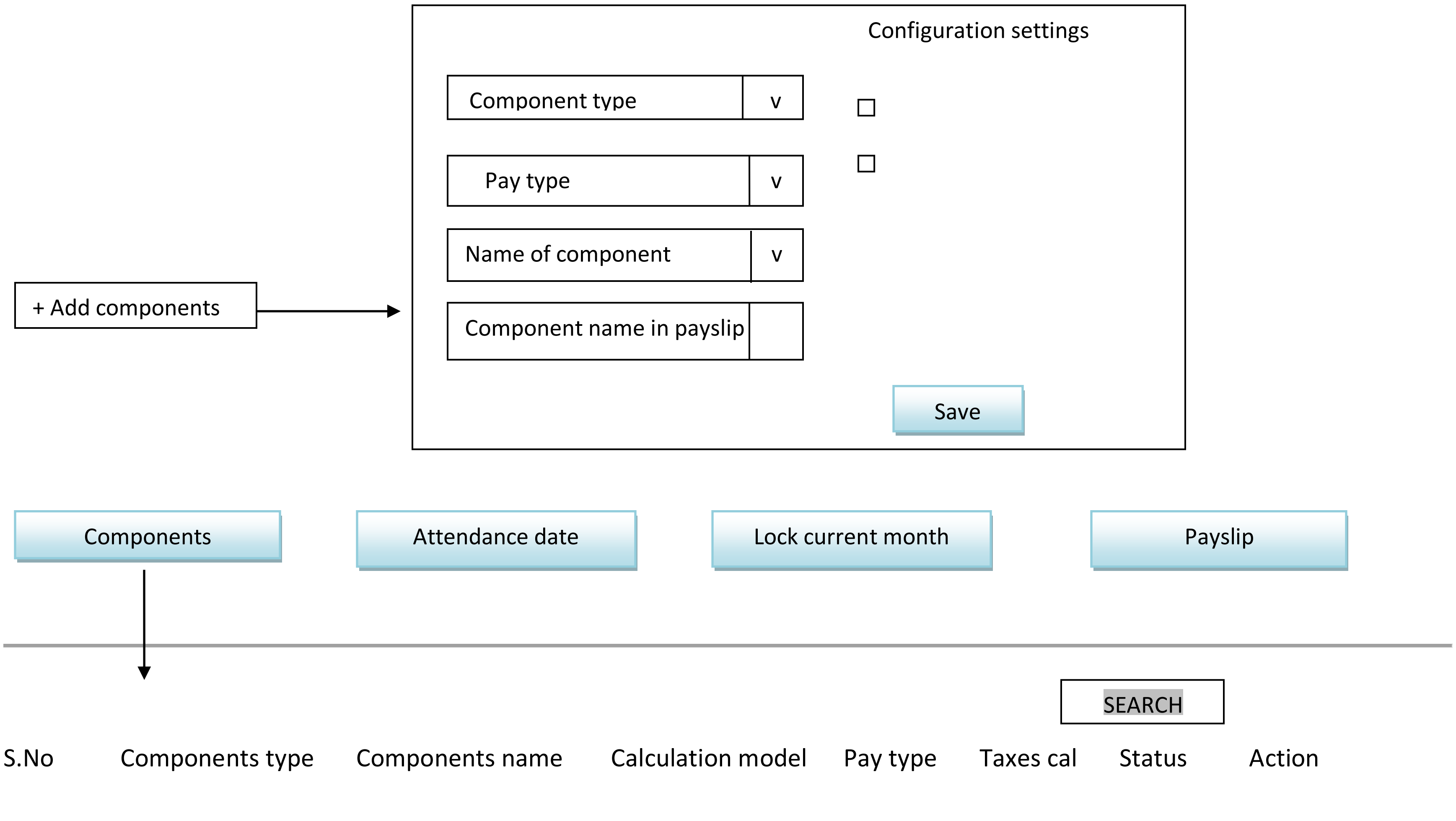
Project Description

Budgie offers number of integrated modules related to Payroll, Business claims, Performance Management System, Leave and Attendance Management, Asset Management, Income tax that helps to automate conventional HR procedures, management, and services. Employees claim for their allowances through the payroll process, where payroll stores all of the employee data in order to produce pay slips and salary. PMS module track employees overall performance based on which the appraisal or training is made. Through this website, users can examine their own personal information as well as the information of their coworkers.

PAYROLL

S.NO	MENU	WORKFLOW DESCRIPTION
1	**Settings**	– The settings tab must have sub tabs as Components, Attendance date, lock current month and Pay slip. • **Components** tab should contain **Add Component** tab with payroll components to capture inputs as Component type (earning, deduction and reimbursement) as drop down, Pay type (fixed pay, variable pay) as drop down, Name of Component, Component name in pay slip. • The Configuration setting should ask for check options as Consider tax calculation, Consider pro-data basis calculation, Consider for PF calculation, Show this component in pay slip, consider for arrear calculation etc., with save tab. – **Components** tab should shown entries on numberings as 10, 25, 50 and 100. • They must have headers as S.No, Components type, Components name, Calculation model, Pay type, Taxes cal or PF cal, Status and action tab with edit, change status and delete tabs. • The search tab must have help search based on keywords. – **Attendance date** is used to set the payroll attendance of employees with start date, end date with update tab. – **Lock current month** should contain Download sample excel option. • Lock current month should have the following headers S.No, List of month, Start payroll, End payroll, Payroll month, Status and Action tab. • The locked month should display the status as inactive and current month should be shown as active. • Action should display lock current month, upload current month pay sheet, view current month pay sheet option. – **Payslip** need to be with Employee name or ID as input tab with clear option. • The records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. • Those details need to copied, and download through Excel, CSV, PDF and Colvis options. • The **search field** has to be present to search the records by passing keywords. Payslip should contain employee code, employee name, date of joining, Payslip month and action.

SETTINGS


Configuration settings
Component type
v
Pay type
v
Name of component
v
Component name in payslip
+ Add components
Save
Components
Attendance date
Lock current month
Payslip
SEARCH
S.No
Components type
Components name
Calculation model
Pay type
Taxes cal
Status
Action

ATTENDANCE DATE

Start date | v

End date | v

Update

LOCK CURRENT MONTH

Download sample excel

S.No	List of month	Start payroll	End payroll	Pay roll month	Status	Action

PAYSLIP

Employee name v

Clear

COPY | EXCEL | CSV | PDF | COLVIS

SEARCH

S.No	Employee code	Employee name	Date of joining	Payslip month	Action

CTC BREAKUP

S.NO	MENU	WORKFLOW DESCRIPTION
2	**CTC Breakup**	**CTC Breakup** should contain download sample excel and import tab. – It also should shown entries on numberings as 10, 25, 50 and 100. – The search tab must have help search based on keywords. – It should have the download format of copy, excel, CSV, PDF, print and colvis. – It should have header options as S.No, Employee ID, Employee name, With effect date, Basic PM, Special allowance PM, HRA PM, LTA PM, Other allowance PM, Conveyance allowance PM, Sodexo PM, Internet charges PM, Stipend PM, Medical allowance PM, Revision order, Previous with effect date, Action and created at.

CTC Breakup

Download sample excel   Import

COPY	EXCEL	CSV	PDF	COLVIS

SEARCH

S.NO   EMP ID   EMP NAME   WITH EFFECT DATE   BASIC PM   SPECIAL ALLOWANCE PM   HRA PM   LTA PM +

Note + Other allowance PM, Conveyance allowance PM, Sodexo PM, Internet charges PM, Stipend PM, Medical allowance PM, Revision order, Previous with effect date, Action

LOAN

S.NO	MENU	WORKFLOW DESCRIPTION
3	**Loan**	**Loan** should contain Employee tab in which the user can search the employee with name or employee id. – In the drop down option 10, 25, 50 and 100 numeric are there, depending upon user's requirement they can view the entries. – The user can search through Employee Id or Name in search option tab. – **Add new loan** tab – Employee id, loan type as drop down option, Loan amount, No. of. Installment, Loan name, EMI amount as input field, Begin month as updated calendar, total along with close and save changes tab. – Loan should contain the following header as Employee, Loan id, loan name, loan begin, loan amount, EMI amount, No. of. Instalment, status and action. • Action should display edit, history, preview and delete option.

LOAN

Employee name v

+ Add new loan

Employee ID v

Loan name

Loan type v

Loan amount

No. of. Instalment

EMI amount

Begin month

Total

Close

Save changes

SEARCH

Employee	Loan Id	Loan Begin	Loan amount	EMI amount	No. of. Instalment	Status	Action

PF LOGIC

S.NO	MENU	WORKFLOW DESCRIPTION
4	**PF Logic**	**PF** should have the PF logic tab and View Employee PF. – **PF Logic** tab should have logics as Pf on basic-PF0001, Pf on Basic or restricted amount-PF002, etc... – **View Employee PF** should have headers as S.No, Employee code, Employee name, PF logic, Payroll state and action (with edit option). • In the drop down option 10, 25, 50 and 100 numeric are there, depending upon user's requirement they can view the entries. • The user can search through Employee Id or Name in search option tab.

HOMEPAGE

PF LOGIC

VIEW EMPLOYEE PF

Basic- PF0001 12% of basic salary

Basic- Restricted – PF0002 12% of Basic salary with minimum amount of 15000

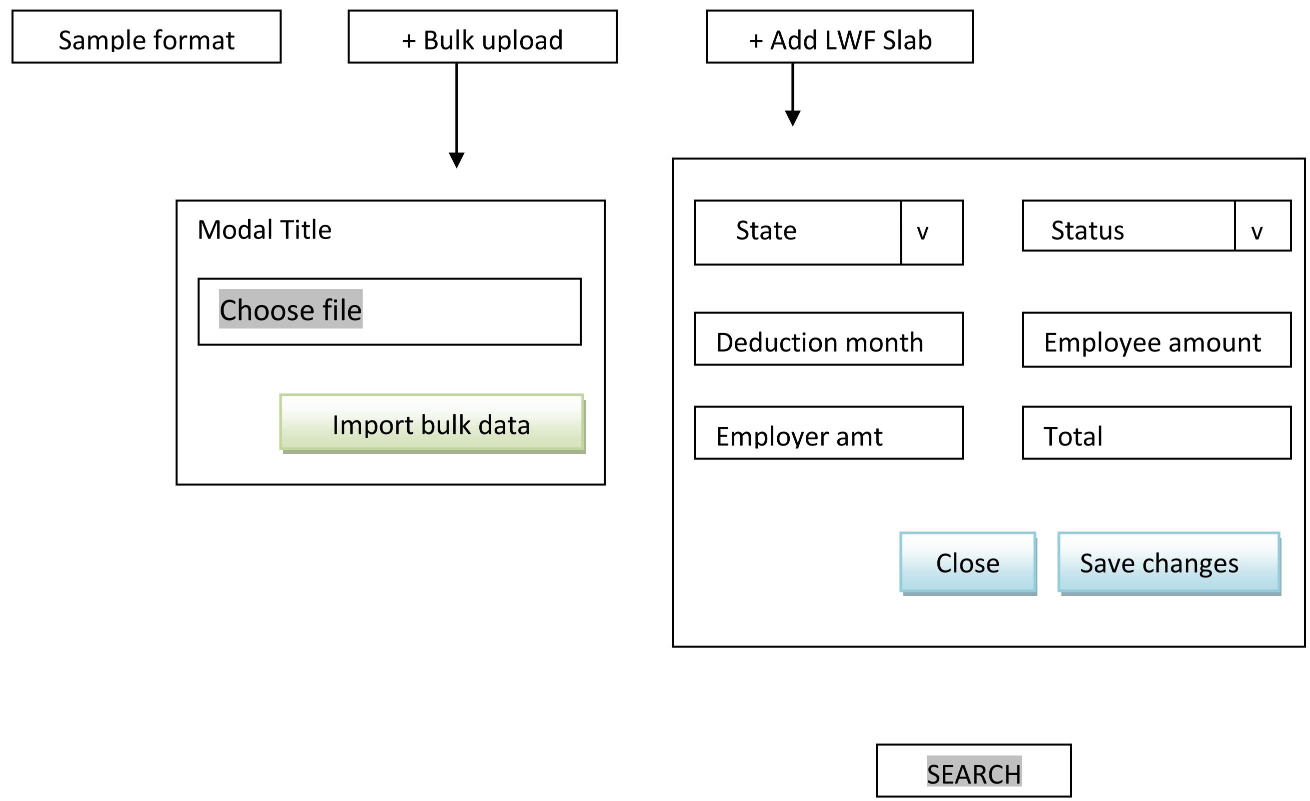
SEARCH

S.No Employee code Employee name PF logic Payroll state Action

LWF SLAB

S.NO	MENU	WORKFLOW DESCRIPTION
5	**LWF slab**	**LWF Slab** should contain following tabs like Sample format, bulk upload and Add LFW Slab. • Through **sample format** options the user can download the file. • **Bulk upload** includes Choose file option to upload the data and Import bulk data tab. • **Add LWF Slab** includes State, Status, Deduction month, Employee amount, Employer amount and total as input field along with Close and save changes tab. – It must have details with header options like State, status, deduction month, Employee, employer, total and action (edit & delete option). – In the drop down option 10, 25, 50, 100numeric are there, depending upon user's requirement they can view the entries. – The user can search through Employee Id or Name in search option tab.

LWF SLAB:

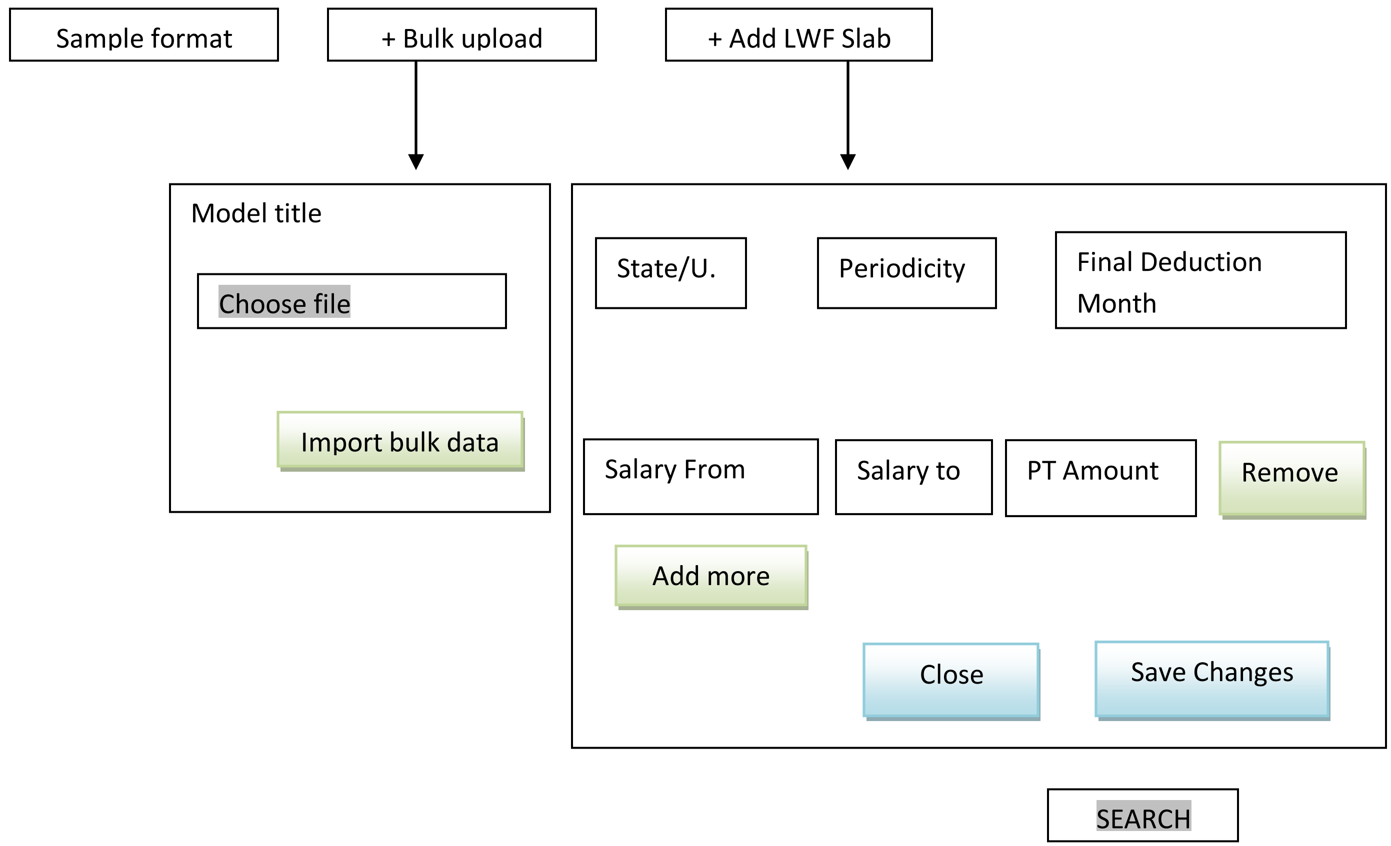


State	Status	Deduction month	Employee	Employer	Total	Action

PT SLAB

S.NO	MENU	WORKFLOW DESCRIPTION
6	**PT slab**	**PT slab** should contain the tabs as Sample format, Bulk upload and Add PT slab. – **Sample format** should download a predefined excel format. – **Bulk upload** should help import a bulk data from system files. – **Add PT slab** pop up must display State/UT and Periodicity as drop down option, PT Amount as up and down option, final deduction month as updated calendar, salary from and salary to in input filed, with remove and add more option, close and save changes tab. – The **search field** has to be present to search the records by passing keywords. – In the drop down option 10, 25, 50, 100numeric are there, depending upon user’s requirement they can view the entries. – PT slab should have the following header as S.No, State/U.T, Periodicity, from, to, salary from, salary to, PT amount, deduction type and deduction month.

PT SLAB:

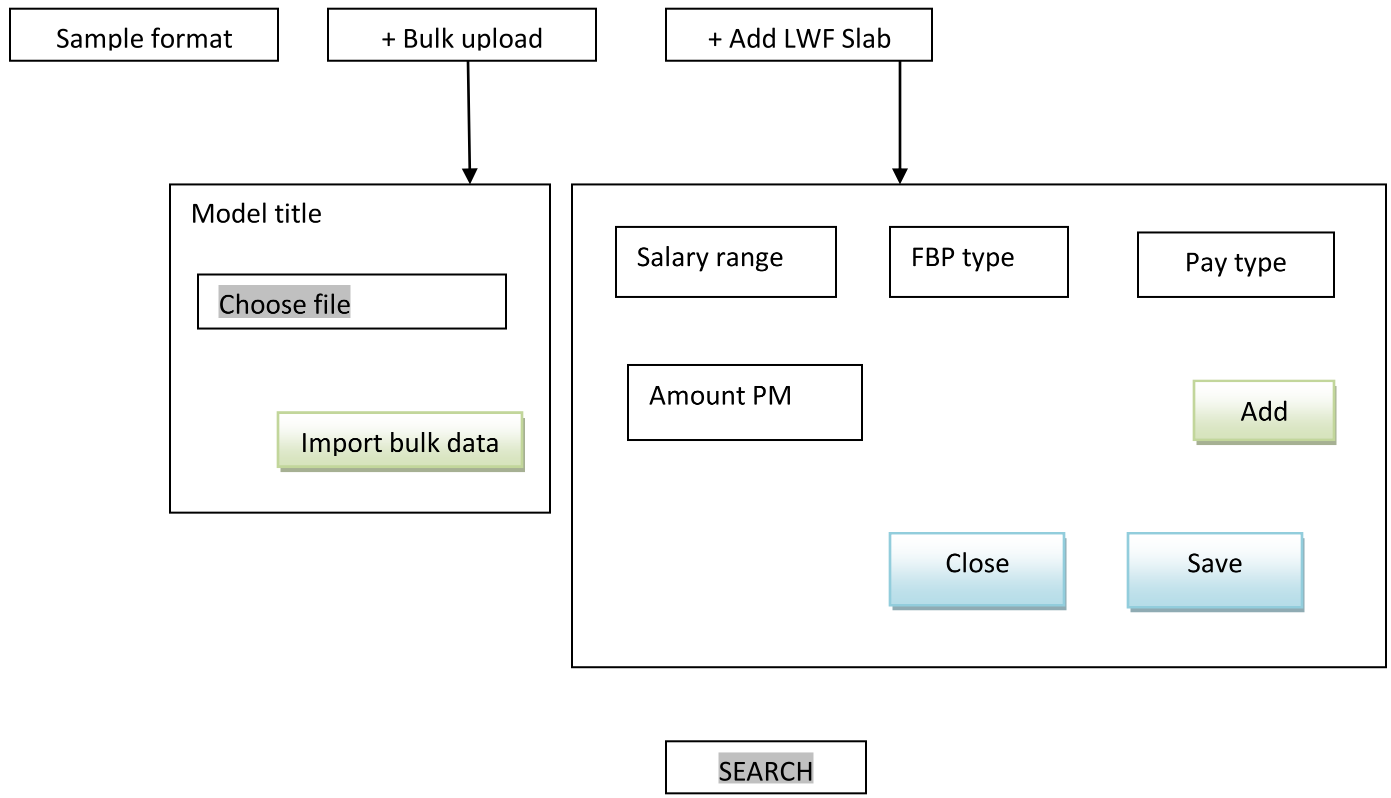


State / U.T	Periodicity	From	To	Salary from	Salary To	PT amt	Deduction type	Deduction amt	Action

FBP

S.NO	MENU	WORKFLOW DESCRIPTION
7	**FBP**	**FBP** should contain the tabs as Sample format, Bulk upload and Add FBP. – **Sample format** should download a predefined excel format. – **Bulk upload** should help import a bulk data from system files. – **Add FBP** pop up should display Salary range, FBP type, pay type as drop down option, Amount (Per month) as input field. - Multiple FBP components can be inserted and removed using add tab and remove tab, with Close and save changes option. – **5 to 10 Lakhs** tab it will display following details with header option as FBP type, Amount (PM) and actions include edit and delete option. – The records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. – The **search field** has to be present to search the records by passing keywords. – **Above 10 Lakhs** tab it will display following details with header option as FBP type, Amount (PM) and actions include edit and delete option. • The records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. • The **search field** has to be present to search the records by passing keywords.

FBP:



FBP type	Amount PM	Action

FBP MASTER SETUP

S.NO	MENU	WORKFLOW DESCRIPTION
8	**FBP master setup**	**FBP master setup** contains following details with header option as S.No, Month, open date, close date, status and action. – The records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. – The **search field** has to be present to search the records by passing keywords.

FBP MASTER SETUP

SEARCH

S.No	Month	Open date	close date	Status	Action

REIMBURSEMENT CLAIM

S.NO	MENU	WORKFLOW DESCRIPTION
9	**Reimbursement claim**	**Reimbursement claim** should have the filter option as from date and to date with updated calendar and action (clear tab). **Create new claim** tab contains following details with header option as claim date, reimbursement type, bill date, bill no, attachment, bill amount, remarks, and status. • The records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. • The **search field** has to be present to search the records by passing keywords.

REIMBURSEMENT CLAIM

From date | To date | Action

dd- mm-yyyy | dd- mm-yyyy | CLEAR

Create New Claim

Reimbursement type | Bill date | Bill No | Bill Amount | Attachment

Choose file

+Add another bill

Send for approval | Save as Draft

SEARCH

Claim date	Reimbursement type	Bill date	Bill No	Attachment	Bill amount	Remarks	Status	Action

REIMBURSEMENT MASTER SETUP

S.NO	MENU	WORKFLOW DESCRIPTION
10	**Reimbursement master setup**	**Reimbursement master setup** should contain the following details with header option as S.No, month, open date, close date, status and action. • The records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. • The **search field** has to be present to search the records by passing keywords.

FBP MASTER SETUP

SEARCH

S.No	Month	Open date	close date	Status	Action

REIMBURSEMENT CLAIM APPROVAL

S.NO	MENU	WORKFLOW DESCRIPTION
11	**Reimbursement claim approval**	**Reimbursement claim approval** list contains Pending and completed tab. **Pending tab** should have the filter option as Request raised by and Reimbursement type as drop down option, Claim date as updated calendar, along with clear tab. • The records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. • The **search field** has to be present to search the records by passing keywords. • It contains following details with header option as Request raised by ID, Request raised by name, claim date, reimbursement type, bill date, Bill no, attachment, bill amount, approved amount and status . **Completed tab** should contain the following details with header option as Request raised by ID, Request raised by name, claim date, reimbursement type, bill date, Bill no, attachment, bill amount, approved bill amount and status. • The records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. • The **search field** has to be present to search the records by passing keywords.

REIMBURSEMENT CLAIM APPROVAL

PENDING COMPLETED

Request raised by | Reimbursement type | Claim date | Action

v | v | dd-mm- yyyy | CLEAR

SEARCH

Request Raised By ID Request Raised By Name Claim Date Reimbursement Type Bill Date Bill No Attachment Bill Amt Approved Amount Status

SEARCH

Request Raised By ID Request Raised By Name Claim Date Reimbursement Type Bill Date Bill No Attachment Bill Amt Approved Bill Amount Status

PAYSHEET

S.NO	MENU	WORKFLOW DESCRIPTION
12	**Paysheet**	**Paysheet** must contain **Run payroll** tab which when invoked it should display the records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. • The **search field** has to be present to search the records by passing keywords. • It contains following details with header option as S.No, employee code, employee name, date of joining, Std days, days worked, LOP, (Nw/Sr) Arr days, Basic, Basic arrears, special allowance, special allowance arrears, HRA, HRA arrears, LTA, LTA arrears, other allowance, conveyance allowance, conveyance allowance arrears, sodexo, internet charges, internet charges arrears, stipend, stipend arrears, medical allowance, medical allowances arrears, incentive, overtime LOP reversal, gross, PF, LWF, PT, ESIC, Income tax, PF arrear, Loan, other deduction, VPF, Gross deduction, Net pay, Vehicle, Mobile, Total reimbursement, Pay status (release).

PAYSHEET

Run Payroll

Current payroll – 03-2023

COPY	EXCEL	CSV	PDF	COLVIS

SEARCH

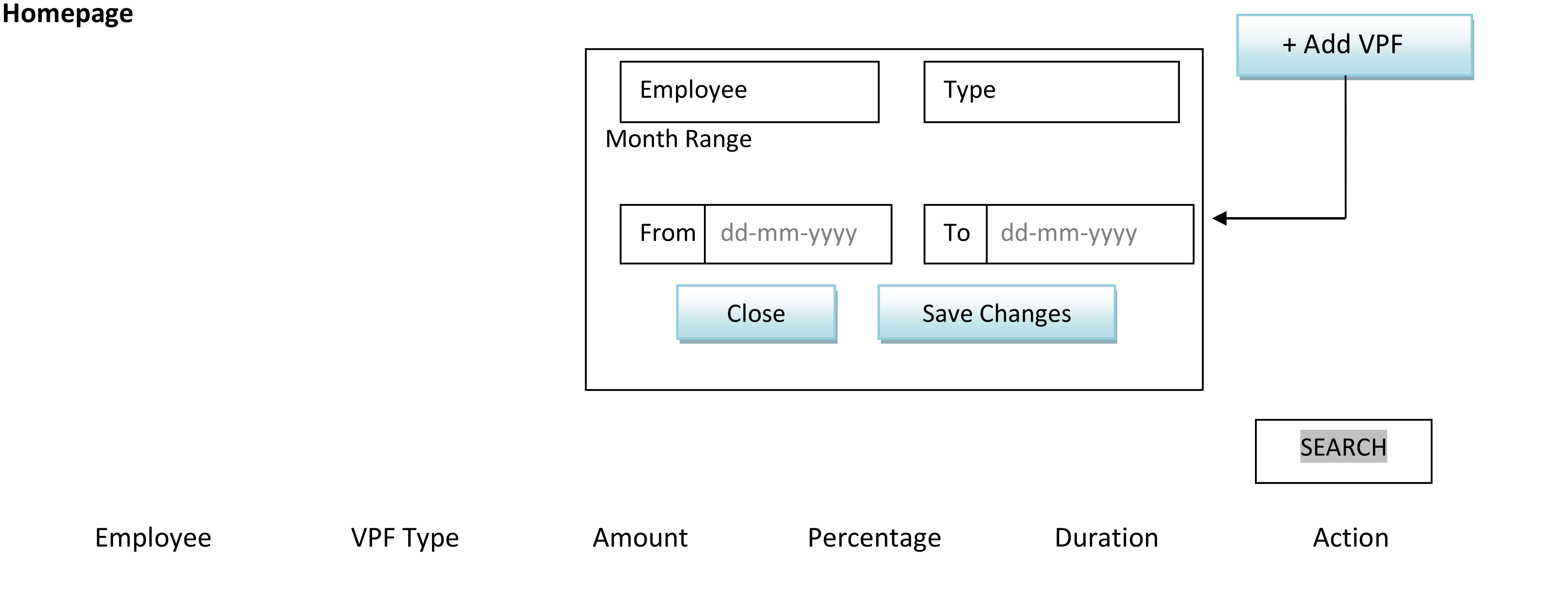
S.No	Emp code	Emp name	DOJ	Date of birth	Sts days	Days worked	LOP	Basic arrears	Special allowance **+**

+ Note special allowance arrears, HRA, HRA arrears, LTA, LTA arrears, other allowance, conveyance allowance, conveyance allowance arrears, sodexo, internet charges, internet charges arrears, stipend, stipend arrears, medical allowance, medical allowances arrears, incentive, overtime LOP reversal, gross, PF, LWF, PT, ESIC, Income tax, PF arrear, Loan, other deduction, VPF, Gross deduction, Net pay, Vehicle, Mobile, Total reimbursement, Pay status (release)

VPF

S.NO	MENU	WORKFLOW DESCRIPTION
13	**VPF**	**VPF** should have **Add VPF tab** in which VPF pop up must display employee, type as drop down option, Month range from and to date in updated calendar with close and save changes tab. • The records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. • The **search field** has to be present to search the records by passing keywords. • It contains the following header option as Employee, VPF type, amount, percentage, duration and action (edit & delete option).

Homepage



MONTHLY IMPORT

S.NO	MENU	WORKFLOW DESCRIPTION
14	**Monthly Import**	**Monthly import** contains Monthly variables and supplementary variables tab. **Monthly variables** need to be with Bulk upload and Download sample file option. – In **Bulk upload** employees list can be uploaded using choose file option. – In **Download Sample File** the sample for employee details must be in predefined and be downloadable in excel format. – The records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. – The **search field** has to be present to search the records by passing keywords. – Those details need to copied, and download through Excel, CSV, PDF and Colvis options. – It should contain the following headers as S.No, Employee Id, Employee name, Incentive earnings, other deduction, Overtime LOP reversal earnings, Income tax deduction, payroll month, and action. **Supplementary variables** need to be with Import and Download sample excel option. – In **Download Sample File** the sample for employee details must be in predefined and be downloadable in excel format. – The records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. – The **search field** has to be present to search the records by passing keywords. – Those details need to copied, and download through Excel, CSV, PDF and Colvis options. – It should contain the following headers as S.No, Employee Id, Employee name, Payroll month, sup_basic, sup_special_allowance, Sup_loan, sup_hra, sup_lta, sup_other_allowance, sup_sodexo, sup_internet_charges, sup_stipend, sup_vehicle, sup_mobile, sup_incentive_earnings, sup_income_tax_deduction sup_overtime_lop_reversal_earnings, sup_medical_allowance, , sup_PF, sup_LWF, sup_PT, sup_ESIC, sup_income_tax, sup_other_deduction sup_PF arrear, created at and action.

MONTHLY IMPORT

Monthly variables

+ Bulk upload

Download Sample File

CHOOSE FILE

Upload

Save

COPY | EXCEL | CSV | PDF

SEARCH

S.No Employee Id Employee name Incentive earnings other deduction

Overtime LOP reversal earnings Income tax deduction payroll month action.

Supplementary variables

+ Import

Download Sample File

S.No Emp Id Emp name Payroll month sup_basic

sup_special_allowance Sup_loan sup_hra sup_lta **+**

+ Note sup_other_allowance, sup_sodexo, sup_internet_charges, sup_stipend, sup_vehicle, sup_mobile, sup_incentive_earnings, sup_income_tax_deduction sup_overtime_lop_reversal_earnings, sup_medical_allowance, sup_PF, sup_LWF, sup_PT, sup_ESIC, sup_income_tax, sup_other_deduction sup_PF arrear, created at and action.

ESIC

S.NO	MENU	WORKFLOW DESCRIPTION
15	**ESIC**	**ESIC** should contain Add ESIC tab, in which ESIC pop up must display Employee %, Employer % tab as input field with close and save changes tab. – The records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. – The **search field** has to be present to search the records by passing keywords. – It should contain the headers as Employee %, Employer % and action (edit & option).

ESIC

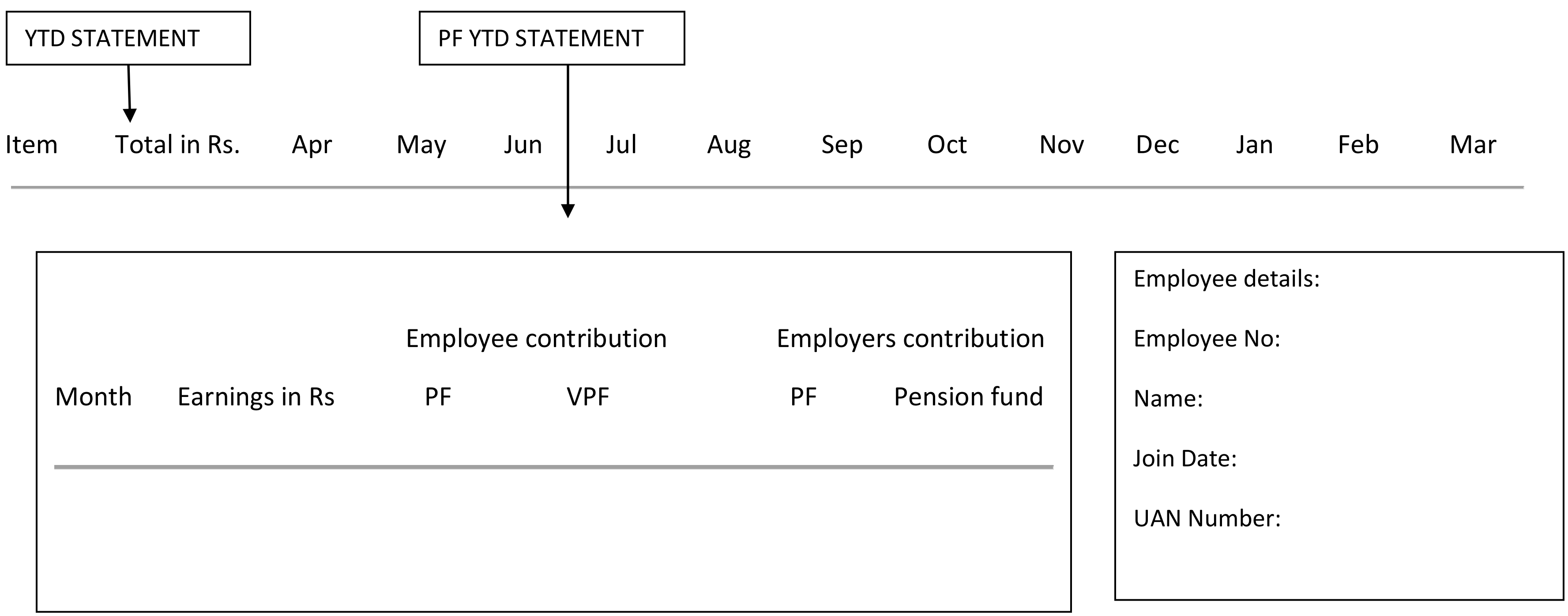
SEARCH

Employee %	Employer%	Action

YTD REPORTS

S.NO	MENU	WORKFLOW DESCRIPTION
16	**YTD reports**	**YTD reports** need to be with YTD statement, PF YTD statement. **YTD Statement** should contain the headers as Item, Total in Rs, From current year April to next year march. **PF YTD statement** should contain the summary of Employee & Employers contribution with the following headers as Month, Earnings in Rs, PF, VPF, Pension fund.

YTD REPORTS



IT DECLARATION REPORT

S.NO	MENU	WORKFLOW DESCRIPTION
17	**IT Declaration Report**	**IT Declaration Reports** should contain the employee list with drop down option. – The records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. – The **search field** has to be present to search the records by passing keywords. – Those details need to copied, and download through Excel, CSV, PDF and Colvis options. – The details to be with the headers as Id, type, scheme, declare amount, max amount, attachment, remarks, admin remarks, status.

IT DECLARATION REPORT

Employee list v

COPY	EXCEL	CSV	PDF

SEARCH

ID	TYPE	SCHEME	DECLARE AMOUNT	MAX AMT	ATTACHMENT	REMARKS	ADMIN	REMARKS	STATUS

TAX SHEET

S.NO	MENU	WORKFLOW DESCRIPTION
18	**Tax sheet**	**Tax sheet** should contain the employee list with drop down option. – The records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. – The **search field** has to be present to search the records by passing keywords. – Those details need to copied, and download through Excel, CSV, PDF and Colvis options. – The details to be with the headers as Id, Employee code, employee name, gender, age, DOJ, Date of leaving, Pan number, tax regime, department, designation, basic, special allowance, HRA, LTA, other allowance, conveyance allowance, Sodexo, Internet charges, stipend, incentive, Overtime LOP reversal, medical allowance, Employer contribution, loan perk, sale perk, Gross income without perk, HRA exemption, Gratuity exemption, leave encashment exemption, total exemption, salary after section10, Previous employment salary, PT, net salary, standard deduction, Tax on employment, salary after section16, Income from other source, Income or loss from house property, Gross total income, Mediclaim, 80DD, 80DDB, 80E, 80EE, 80EEA, 80EEB, 80U, Total S80CCE, Total investment S80, Taxable income, Tax slab, One slab, Tax on income, Surcharge, Tax after surcharge, Rebate U/S 87A, Education cess, total tax, tax deducted till last month, Previous employee tax, net tax, tax per month, annual PF, Annual VPF, LIC, NSC, PPF, ULIP, ELSS, child education, housing loan, FTD, post office time deposit for 5 years, pension plan, 80CCD1, Total investment, HRA paid, rent paid.

TAX SHEET

Employee list v

COPY	EXCEL	CSV	PDF

SEARCH

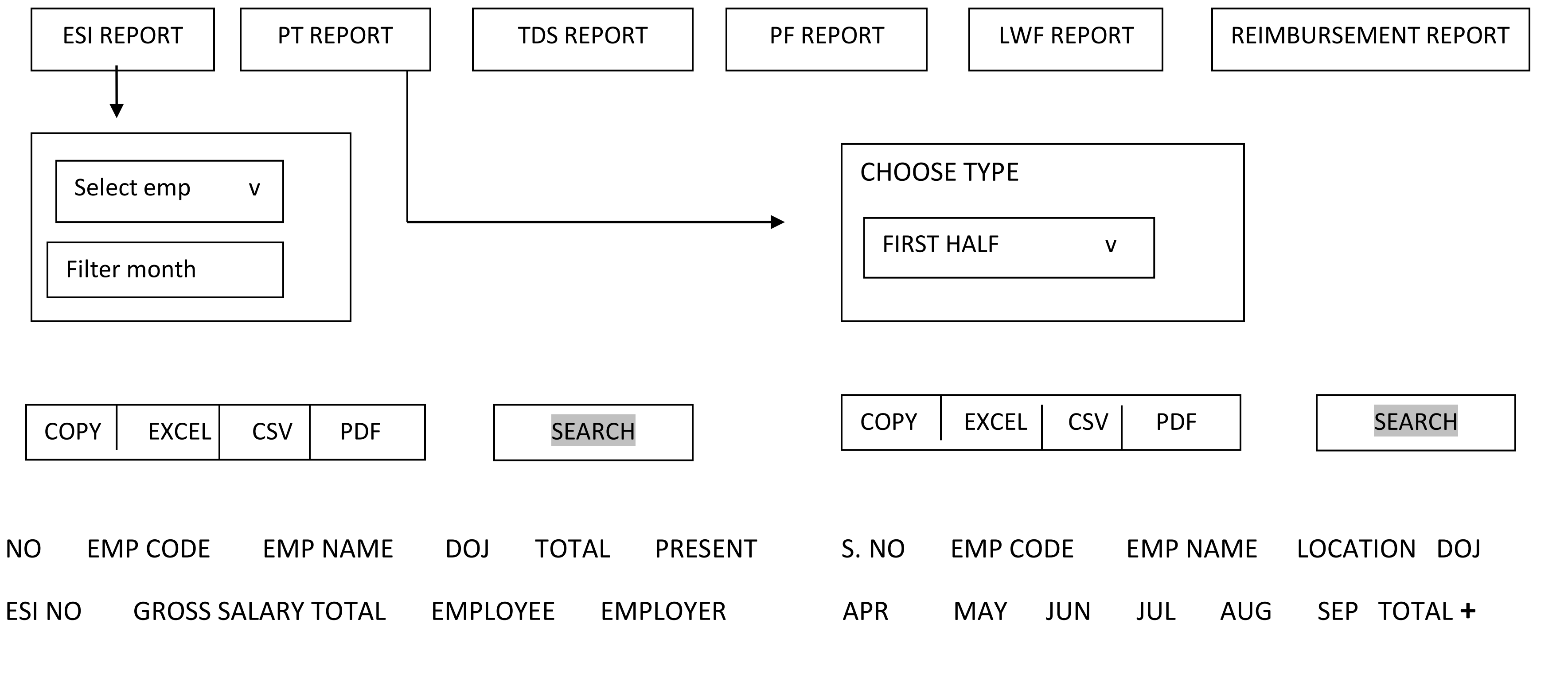
ID	EMP CODE	EMP NAME	GENDER	AGE	DOJ	DATE OF LEAVING	PAN NUMBER	TAX REGIME	DEPARTMENT	DESIGNATION +

+NOTE basic, special allowance, HRA, LTA, other allowance, conveyance allowance, Sodexo, Internet charges, stipend, incentive, Overtime LOP reversal, medical allowance, Employer contribution, loan perk, sale perk, Gross income without perk, HRA exemption, Gratuity exemption, leave encashment exemption, total exemption, salary after section10, Previous employment salary, PT, net salary, standard deduction, Tax on employment, salary after section16, Income from other source, Income or loss from house property, Gross total income, Mediclaim, 80DD, 80DDB, 80E, 80EE, 80EEA, 80EEB, 80U, Total S80CCE, Total investment S80, Taxable income, Tax slab, One slab, Tax on income, Surcharge, Tax after surcharge, Rebate U/S 87A, Education cess, total tax, tax deducted till last month, Previous employee tax, net tax, tax per month, annual PF, Annual VPF, LIC, NSC, PPF, ULIP, ELSS, child education, housing loan, FTD, post office time deposit for 5 years, pension plan, 80CCD1, Total investment, HRA paid, rent paid.

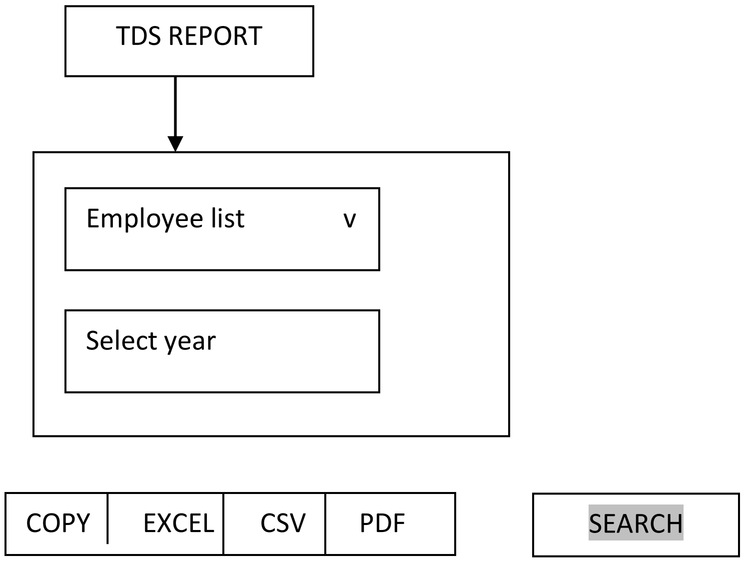
REPORT

S.NO	MENU	WORKFLOW DESCRIPTION
19	**Report**	**Payroll reports** need to be with ESI report, PT report, TDS report, PF report, LWF report, Reimbursement report tab. – The records must show based on the **show entries** that user prefers as 10, 25, 50, and 100. – The **search field** has to be present to search the records by passing keywords. – Those details need to copied, and download through Excel, CSV, PDF and Colvis options. – The above points are common for all the tabs. **ESI report** tab should contain filter option- Select employee in drop down option, Filter month in updated calendar. – The list can be shown as the following headers as S.No, Employee code, Employee name, DOJ, Total present, ESI No, Gross salary total, employee, employer **PT report** tab need to with chose type filter option in drop down option. – The list can be shown as the following headers as S.No, Employee ID, employee name, Location, DOJ, April- September (1^{st} half) October- March (2 half) month amt to be displayed, Half yearly PT and total. **TDS report** tab should contain the Employee list in drop own option, select year in updated calendar. – It should contain Id, Employee code, name, Gross earnings, Tax, surcharge, Cess, total TDS. **PF report** tab need to be with select employee, filter month option with updated calendar. – The list must have S.No, UAN, Employee name, Gross wages, EPF wages, EPS wages, EDLI wages, EE12%, ER 8.33%, ER 3.67%, NCP, loan, EDLI charges, and admin charges. **LWF report** tab should contain filter option- select employee and select year in drop down option. – The list should contain Employee ID, Employee name, Department, Designation, LWF EE contribution, LWF EE Contribution. **Reimbursement Report** tab need to with filter option- select employee with drop down option, select year/month with updated calendar. – It should contain S.No, employee code, employee name, payroll month, reimbursement, eligibility (month), Prorated for the month, Eligibility YTD till, Paid- till last month, Bills approved(monthly), Amount paid (monthly), Bills C/F till, Available YTD.

PAYROLL REPORTS

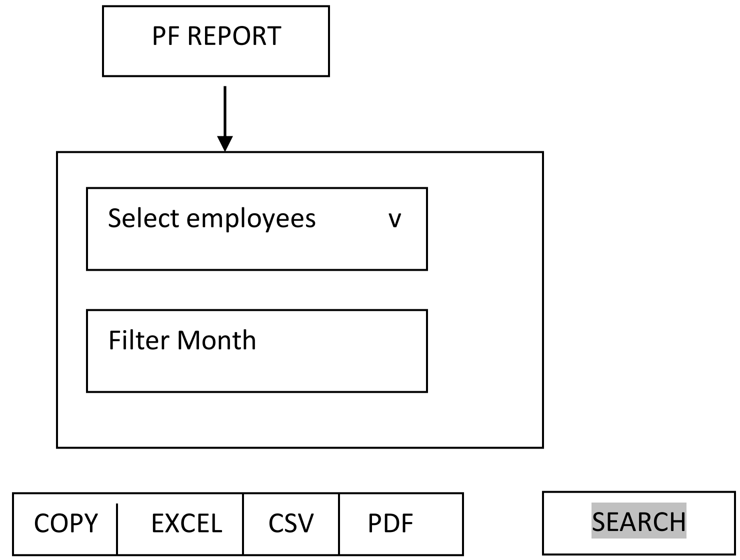


+ NOTE Half yearly PT, Oct, Nov, Dec, Jan, Feb, Mar, Total



ID EMP CODE NAME GROSS EARNINGS TAX CESS

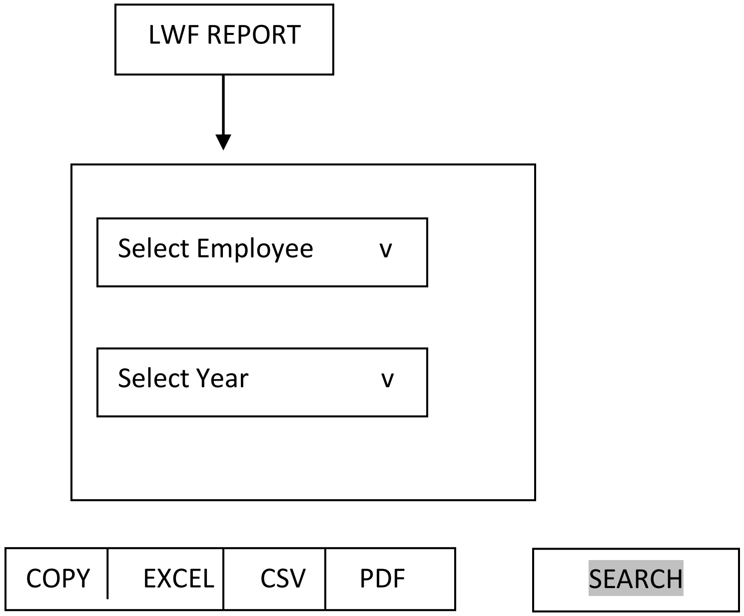
SURCHARGE TOTAL TDS

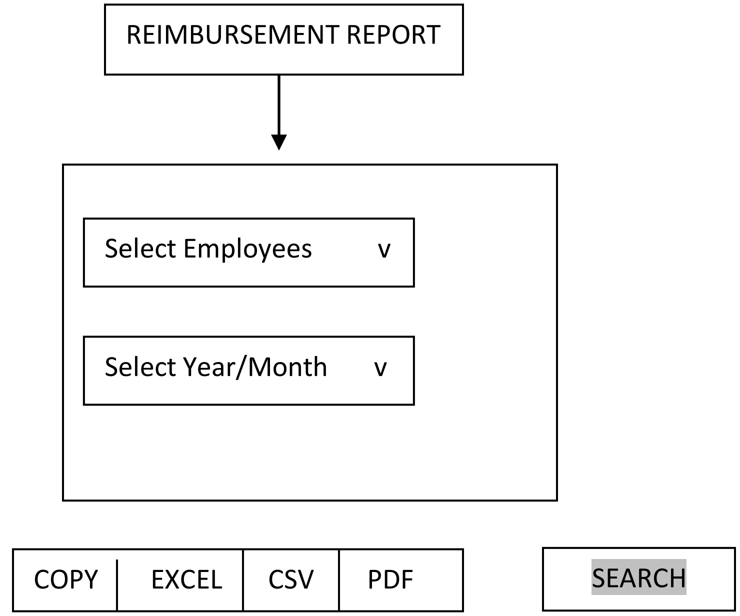


S.NO EMP ID UAN NAME GROSS WAGES EPS WAGES

EPF WAGES EDLI WAGES EE12% ER 8.33% NCP LOAN

EDLI CHARGES ADMIN CHARGES





EMP ID NAME DEPARTMENT DESIGNATION LWF EE CONTR LWF ER CONTR

S.NO EMP CODE NAME PAYROLL MONTH REIMBURSEMENT ELIGIBILITY (MONTHLY) PRORATED FOR THE MONTH **+**

+ NOTE Eligibility YTD till, Paid- till last month, Bills approved (monthly), Amount paid (monthly), Bills C/F till, Available YTD

SALARY

S.NO	MENU	WORKFLOW DESCRIPTION
1	**IT declaration**	– If employee newly login t o salary page it must ask for regime modal as old regime. – If yes, IT declaration should contain Employee list tab with drop down option. – It declaration it incorporates ITD components which includes Section 80 C, Other chapter VI- A deductions, house rent allowance,, Medical (SEC 80D), Income/Loss from house property, Other income. • **Section 80 C** will display **Total declaration in ₹, Maximum limit in ₹** based on list of selective components of 80 C(80C 5 years of fixed Deposit in scheduled bank, 80C Children tuition fees, 80C CC Contribution to pension fund, 80C deposit in NSC, 80C deposit in NSS, 80C deposit in post office savings scheme, etc..) with add option. - Out of these listed components only one can be selected from the employees through add option with **Max tax exemption** as default with 1, 50,000 and **declared amount** tab as input field with remove option. • **Other Chapter VI-A Deductions** will display **Total declaration in ₹** based on list of selective components of Other Chapter VI-A Deductions (80EE additional interest on housing loan borrowed as 1st April 2016, 80G donation-100% exemption, 80G donation- Children education, 80G donation- political parties, etc..) with add option. - Out of these listed components only one can be selected from the employees through add option with **Max tax exemption** as default amount will differ for each components and **declared amount** tab as input field with remove option. • **House rent allowances** will display the total declared amount will be inflected based on monthly rent amount. - The employees rent amount has to be captured through from and to date in updated calendar, monthly rent amount as input field it should automatically calculate and display total rent amount. - The house details should be with House name/ No, Street/Area/Locality, Town/city, Pin code as input field. - The landlord details has to be fetched with landlords name, Landlords Pan, Landlords

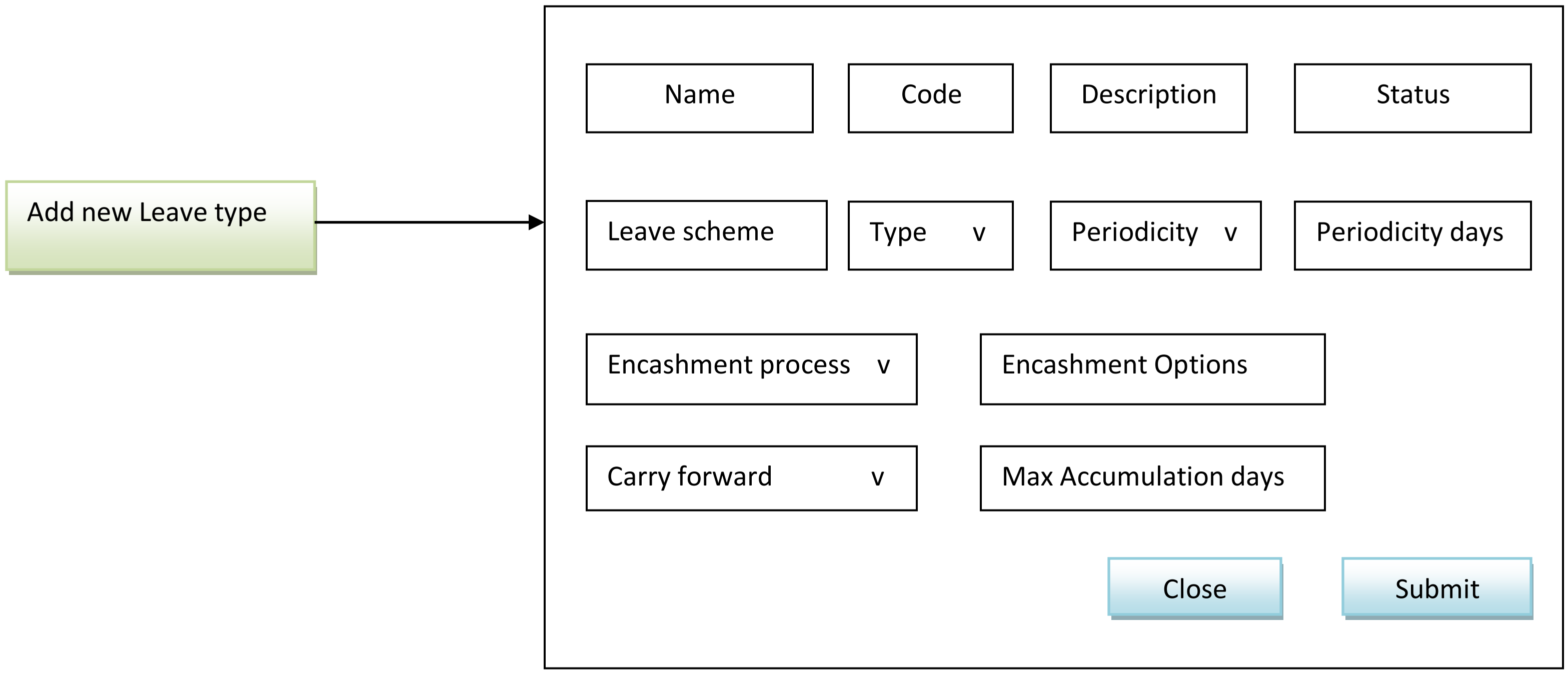
		address with house name/no, Street/Area/Locality, Town/city, Pin code as input field. - Add house option has to be included to add one or more housing details with remove option. • **Medical (SEC 80D)** will display **Total declaration in ₹, Maximum limit in ₹** based on list of selective components of Medical SEC 80D (80D Medical bills- Senior citizen, 80D Medical Insurance premium, 80D Medical Insurance premium- Dependent parents, 80D Preventive health check up, etc..) with add option. - Out of these listed components only one can be selected from the employees through add option with **Max tax exemption** as default amount will differ for each components and **declared amount** tab as input field with remove option. - **The Maximum declared amount** should be displayed with headers as covered members, relationship, age, date of birth and remove option. One or more members can be covered through add member. • **Income/Loss from house property** should be for self occupied property & Let out property. - Interest on housing loan for **self occupied property** should be automatically calculated based on the inputs fetched from declared amount, Lenders name, Lenders pan as input field, date of availability of housing loan, date of acquisition as updated calendar. - Income from Let out property should be with input field as 1. Annual letable value/rent received or receivable 2. municipal taxes paid during the year 3. unrealized rent - Net value is calculated as 1-(2+3) - Deduction from net annual value – Standard deduction at 30% of net annual value must be automatically calculated based on interest on housing loan, Lenders name, Lenders pan as input field. - Income/Loss from Letout property will automatically be calculated with the help of dates availing of housing loans, acquisition of housing loan with updated calendar. - Income/Loss can be calculated for one or more letout property can be done through add property tab with remove option.

		• **Other income** will display **Total declaration in ₹** based on other income tab with add option the respective particulars and declared amount has to be provided in the input field with remove option. • The above given menus will be processed only through submit or draft option.
2	**Proof of investment**	– In Proof of Investment employee must provide all the attachments and employee Comments ITD components which includes Section 80 C, Other chapter VI- A deductions, house rent allowance,, Medical (SEC 80D), Income/Loss from house property, Other income.

LEAVE TYPE CATEGORY

S.NO	MENU	WORKFLOW DESCRIPTION
1	**Leave Type category**	**Leave Type category** need to be with add new leave type tab, it should have Name, Code, description, leave scheme, periodicity days as input field, Status, type, periodicity encashment process, carry forward with drop down option and it must have close and submit tab. – The user can search through Employee Id or Name in search option tab. – In the drop down option 10, 50, 100, 250, 500, all numeric are there, depending upon user's requirement they can view the entries. – It should contain following header options like S.No, name, code, description, leave scheme, type, periodicity, periodicity days, encashment process, encashment type, Min. encashment days, carry forward, maximum accumulation, status and action. – Action should have the edit and delete option. **Edit option** redirect to Add new leave type page in which user can edit the details.

LEAVE TYPE CATEGORY



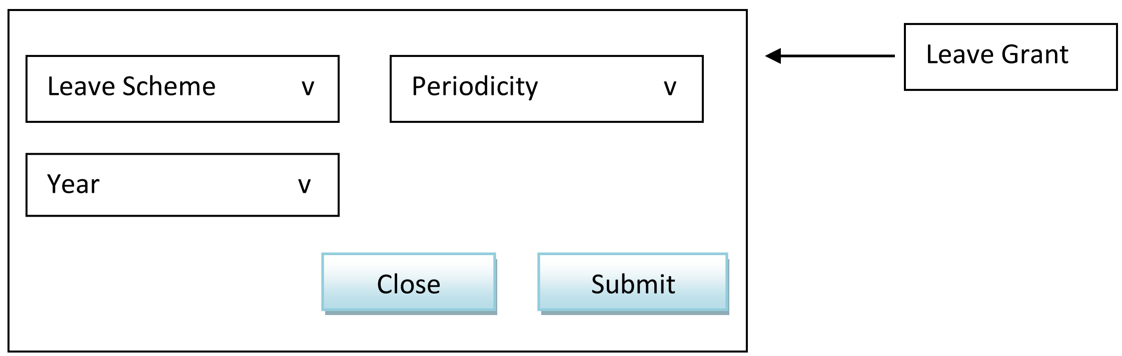
S.NO	NAME	CODE	DESCRIPTION	LEAVE SCHEME	TYPE	PERIODICITY	PERIODICITY DAYS	ENCASHMENT PROCESS **+**

+ NOTE Encashment type, Min. encashment days, carry forward, maximum accumulation, status and action

LEAVE GRANTER

S.NO	MENU	WORKFLOW DESCRIPTION
2	**Leave Granter**	**Leave Granter** should have Leave grant tab which includes leave scheme and periodicity with drop down option, from date and to date with updated calendar. It must have header options as leave type and leave granted, check box with close and save tab. – The user can search through Employee Id or Name in search option tab. – In the drop down option 10, 50, 100, 250, 500, all numeric are there, depending upon user's requirement they can view the entries. – It should contain the header option like S.No, Employee id, employee name, DOJ, scheme, periodicity, from date, to date, applied by and actions. – Action should have the edit and delete option. Edit option includes the header options as S.No, Leave type, leave granted and action.

HOMEPAGE

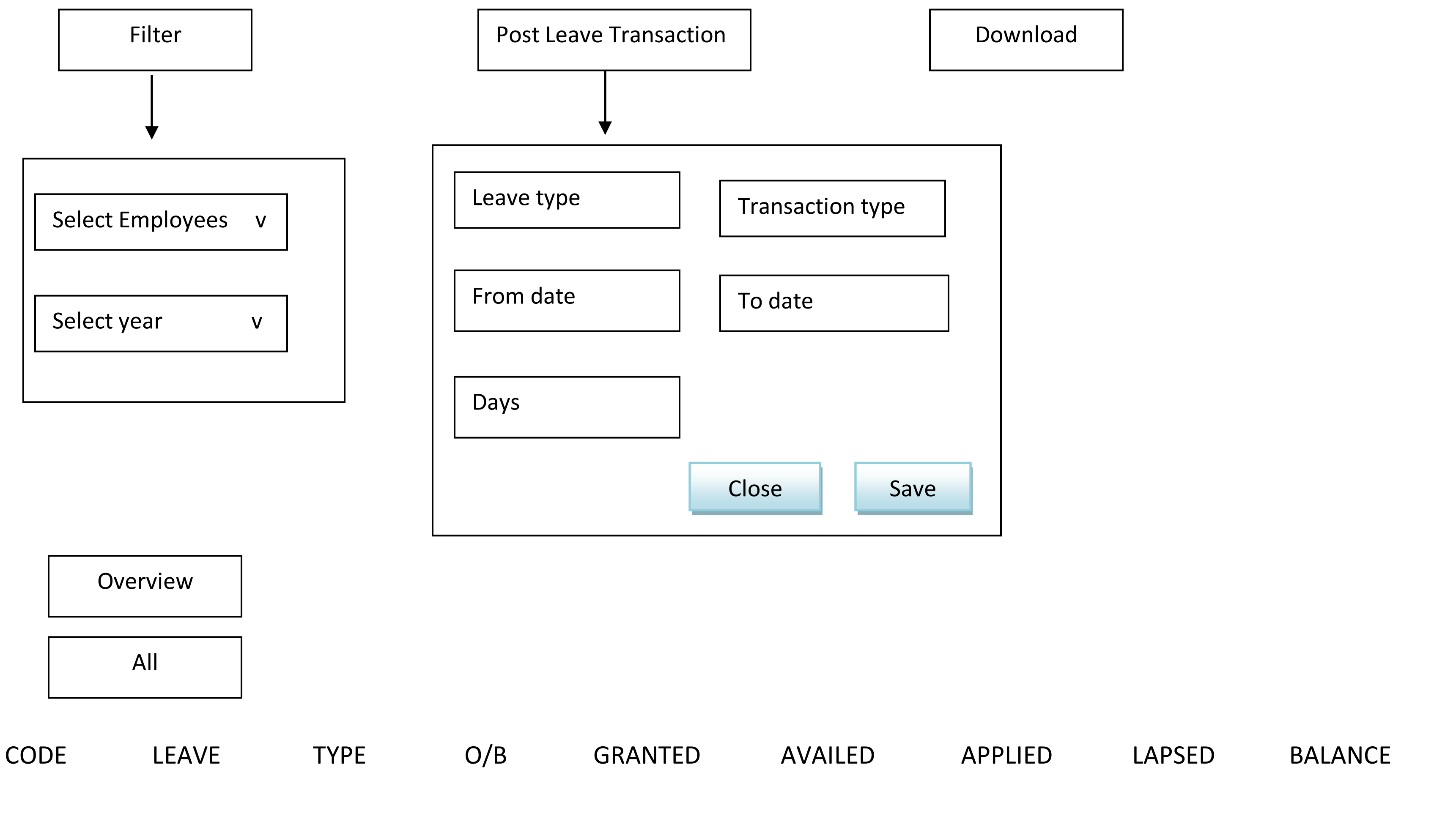


S.No	Emp ID	Emp name	DOJ	Scheme	Periodicity	from date	to date	Applied by	Actions

EMPLOYEE LEAVE BALANCE

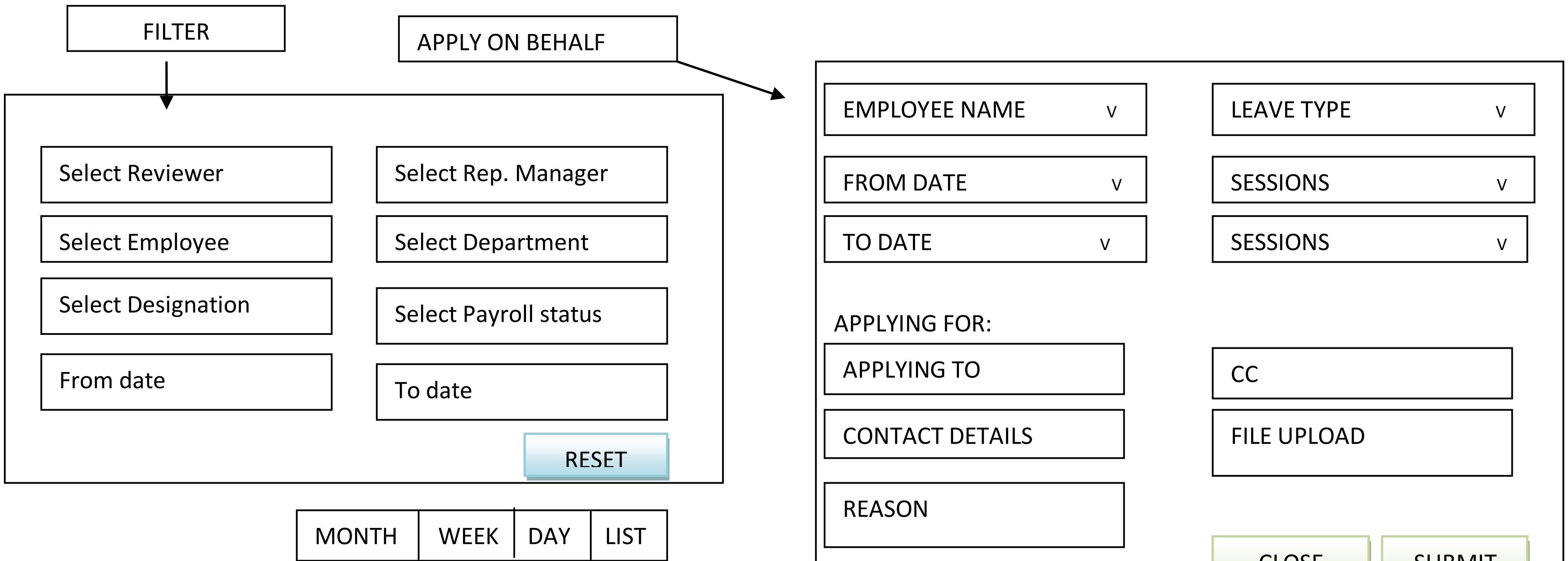
S.NO	MENU	WORKFLOW DESCRIPTION
3	**Employee leave balance**	**Employee leave balance** contains Overview, All options which are described below. Employee leave balance should have the filter option which includes select employee and select year with drop down option. – **Post Leave transaction** should have leave type and transaction type with drop down option, from date and to date with updated calendar, days as input field with close and save. – **Download** option could have leave type transaction type, sort by with drop down option, from date and to date with updated calendar, Generate as -Excel, PDF option with close and download tab. **Overview** must have Post leave transaction and Download tab. – Overview should have the header options as Code, Leave type, O/B, Granted, Availed, Applied, Lapsed and balanced. **All option** should have the filter option which includes select employee and select year with drop down option. – It must have Post leave transaction and Download tab. – Activity details which include Select leave type and select transaction type with drop down options. – It should have the following headers as type, transaction type, Posted on, from, to, days.

EMPLOYEE LEAVE BALANCE



LEAVE CALENDAR

S.NO	MENU	WORKFLOW DESCRIPTION
4	**Leave calendar**	**Leave calendar** should have Filter option namely select reviewer, Rep. manager, employee, department, designation, payroll status, band, and location in drop down option, from and to date in updated calendar along with reset tab. – Using the filter option Admin can view the selected employees leave details. – It should contain apply on behalf tab which includes Employee name, leave type, Sessions 1, Sessions 2 with drop down options. From date and to date should be entered manually. Contact details and reason as input field, File upload with Choose file option Along with Close and Submit tab.



August						2022
Sun	**Mon**	**Tue**	**Wed**	**Thu**	**Fri**	**Sat**
	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**			

LEAVE ENCASHMENT APPROVAL

S.NO	MENU	WORKFLOW DESCRIPTION
5	**Leave Encashment Approval**	**Leave encashment approval** must have shown entries on numberings as 10, 50,100,250 and 500. – The search tab must have help to search based on keywords. – Below it should contain the headers as S.No, employee code, employee name, process type, total sick leave balance, carry forward, encashment, remarks and action.

HOMEPAGE

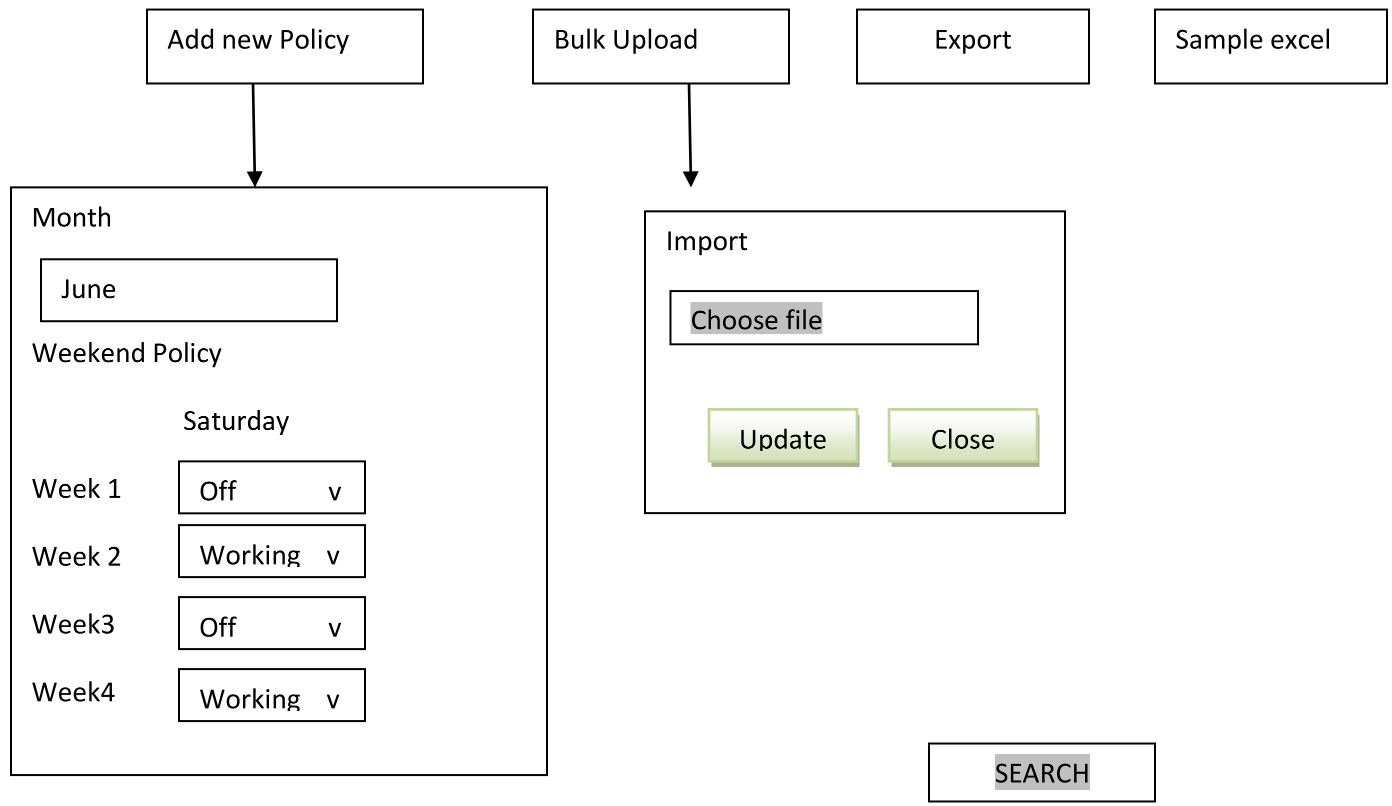
SEARCH

S.NO EMP CODE EMP NAME PROCESS TYPE TOTAL SICK LEAVE BALANCE CARRY FORWARD ENCASHMENT REMARKS ACTION

WEEKEND POLICY

S.NO	MENU	WORKFLOW DESCRIPTION
6	**Weekend policy**	**Weekend policy** displays the ad d new policy, Bulk upload, Export, Sample excel tab. **Add new policy** tab it pop up add new weekend policy with month to select in updated calendar and weekend policy should have the headers as Saturday and Sunday. In **Bulk upload** employees list can be uploaded using choose file option. In **Download Sample File** the sample for employee details must be in predefined and be downloadable in excel format – Weekend policy should have shown entries on numberings as 10, 50,100,250 and 500. – The search tab must have help to search based on keywords. – Below it should contain the headers as s.no, month, Saturday, Sunday and action. – Action must have edit and delete option, edit pop up edit weekend policy it should have month in updated calendar and weekend policy have the header options of Saturday and Sunday with close and update tab.

WEEKEND POLICY



S.NO	MONTH	SATURDAY	SUNDAY	ACTION

LEAVE BALANCE IMPORT

S.NO	MENU	WORKFLOW DESCRIPTION
7	**Leave Balance Import**	**Leave Balance Import** should contain Sample excel option, Import and Export option. – The list should have shown entries on numberings as 10, 50,100,250 and 500. – The search tab must have help to search based on keywords. – Leave Balance Import need to be with header option as S.No, Employee ID, Employee name, Payroll status, Confirmed, DOJ, From date, To date, Applied by and Action.

HOMEPAGE

Download Sample　Import　Export

S.NO	EMP ID	EMP NAME	PAYROLL STATUS	CONFIRMED	DOJ	FROM DATE	TO DATE	APPLIED BY	ACTION

ATTENDANCE - ADMIN LOGIN

S.NO	MENU	WORKFLOW DESCRIPTION

1	**Admin Attendance Info**	**Admin Attendance Info** should contain Legend tab which represents the Holiday, Regularization approval, Regularization pending, Present as P, Absent as A, Leave as L, Off as Off days.
		– At right side corner Attendance info should have three icons – Calendar, Biometric and Graph icon.
		– **Calendar** should display the current month attendance details which are described above.
		– **Biometric** should contain date filter tab in which the user can select the particular date.
		    - Below this the following headers should be placed Date, Shift, attendance scheme, First in, last out, work hrs, actual hrs, status, swipe details, exception, shortfall/excess hrs, Session 1(shift timings), Session 2 (shift timings), early out.
		– **Graph** should contain the details like Average work hrs, Avg actual work hrs, Penalty days, Late in, Early out, Exception days.
		    - It should have the date filter tab, below this pie chart should be displayed as Present and absent with percentage.

ATTENDANCE INFO

BIOMETRIC

GRAPH

MARCH

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1 P	**2** P	**3** P	**4** A : OFF
5 OFF	**6** P	**7** P	**8** P	**9** P	**10** P	**11** P
12 OFF	**13**	**14**	**15**	**16**	**17**	**18**
19 OFF	**20**	**21**	**22**	**23**	**24**	**25**
26 OFF	**27**	**28**	**29**	**30**	**31**	

BIOMETRIC

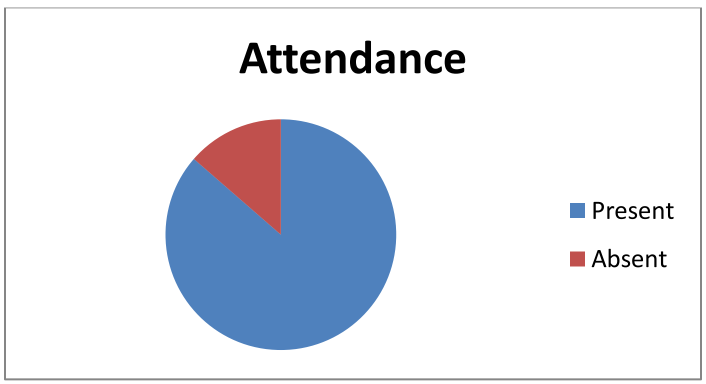
DATE FILTER 25/02/2023 – 24/03/2023

Date	Shift	Attendance Scheme	First In	Last Out	Work Hrs	Actual Hrs	Status	Swipe Details	Exception	Shortfall Hrs	Shift Timings

GRAPH

Avg. Work Hrs	Avg. Actual Work Hrs	Penalty days	Late in	Early out	Exception days

DATE FILTER 25/02/2023 – 24/03/2023



MONTH END PROCESS

S.NO	MENU	WORKFLOW DESCRIPTION
2	**Month End Process** – Leave Application – Attendance Regularization	In Month end Process it should have two tabs- Leave Application and Attendance Regularization. **Leave Application** should have the filter options like Select Leave type, employee in drop down option, with clear tab. – The user can search through Employee Id or Name in search option tab. – In the drop down option 10, 50, 100, 250, 500, all numeric are there, depending upon user's requirement they can view the entries. – It should have the header options like Pending with, Employee name, Employee ID, Category, Leave type, Duration, Days, Reason, Applied on, Action, Remarks. **Attendance Regularization** should have the filter options like Select Month, employee in drop down option. – The user can search through Employee Id or Name in search option tab. – In the drop down option 10, 50, 100, 250, 500, all numeric are there, depending upon user's requirement they can view the entries. It should have the header options like Pending with, Employee name, Employee ID, Dates Applied, No. of days, Applied on, View, Action, and Remarks.

MONTH END PROCESS

Leave Application

Select Leave type

Select Employee

Clear

SEARCH

Pending With Emp Id Emp Name Category Leave Type

Duration Days Reason Applied On Action Remarks

Attendance Regularization

Select month

Select Employee

SEARCH

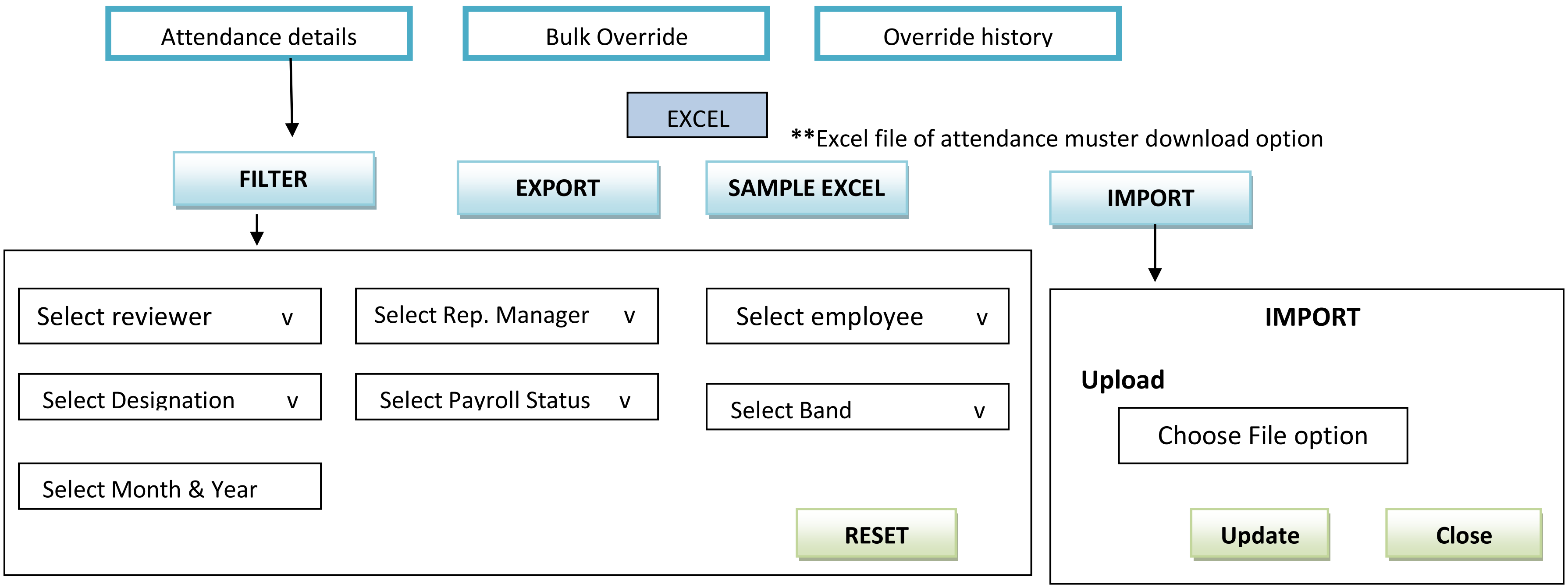
S.No Pending With Emp Id Emp Name Date Applied

No.Of.Days Applied On View Action Remarks

ATTENDANCE MUSTER

S.NO	MENU	WORKFLOW DESCRIPTION
3	**Attendance Muster**	**Attendance Muster** should contain three tabs Attendance details, Bulk override and Override History**.** **Attendance details** contain **filter** option which includes reviewer, reporting manager, employee, department, designation, payroll status, band, location with drop down option, month and year with updated calendar and reset tab. – In **Download Sample File** the sample for employee details must be in predefined and be downloadable in excel format. – **Export** option in which the user can download the details in Excel format. – **Process attendance** option pop up - from date and to date in updated calendar, Employee option as select option (All employees, selected employees) with close and save tab. – In the drop down option 10, 50, 100, 250, 500, all numeric are there, depending upon user's requirement they can view the entries. – It should contain the following header as S.No, Employee Id, Employee name, Designation, Location, Total leave, LOP, week off and total no. of. Present days, Total holidays, Total SL, Total CL, Total Privilege leave, Total probationary leave. From current month 25th to upcoming month 24th attendance must be captured. **Bulk override** need to be with Employee tab as drop down option and date with updated calendar. – It should have the header option as Date, shift code, Swipe (First in, Last out), Status (Session 1, session 2). **Override History,** the list should have shown entries on numberings as 10, 50,100,250 and 500**.** – The user can search through Employee Id or Name in search option tab. – It need to be with header option like Employee name, Employee ID, Attendance date, first in, last out, Status, Overriden on and Remarks.

ATTENDANCE MUSTER:



S.No Emp Id Emp Name Designation Location 25 26 27….. 22 23 24 Location Total Leave LOP Week Off

Total No. Of. Present Days Total Holidays Total SL Total CL Total Privilege Leave Total Probationary Leave

Bulk Override

Override history

Employee v

Date

SEARCH

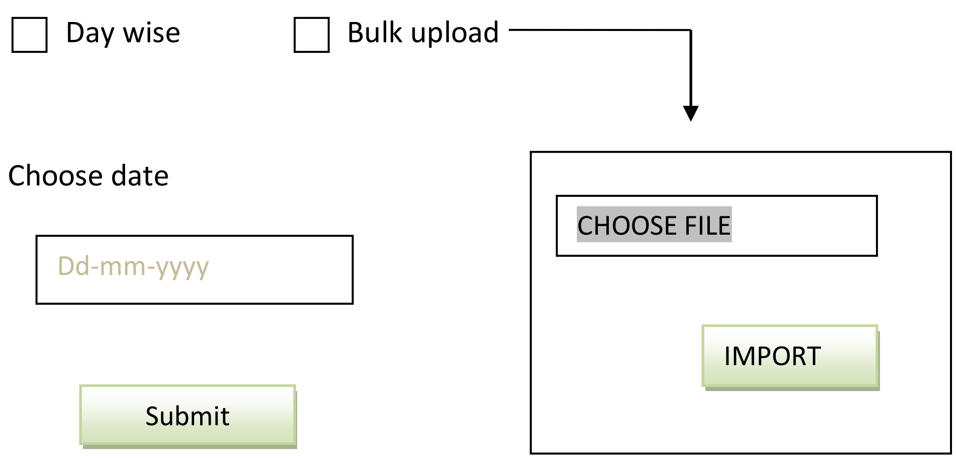
		SWIPE		STATUS	
Date	Shift Code	First In	Last out	Session 1	Session 2

Emp Name	Emp no	Attendance date	First in	Last out
Status	Overriden	Remarks		

ONSITE ATTENDANCE

S.NO	MENU	WORKFLOW DESCRIPTION
4	**Onsite attendance**	**Onsite Import Attendance Process** should contain Day wise and Bulk upload option. – **Day wise** option should have Choose date option with update calendar and submit option. – In **Bulk upload** attendance can be uploaded using choose file option.

HOMEPAGE



PERFORMANCE MANAGEMENT SYSTEM

S.NO	MENU	WORKFLOW DESCRIPTION

1	**PMS Employee**	In **Performance management system** tab, the right side of the portal should display PMS overview and PMS tutorial tab.
		– PMS should have two main tabs as PMS (for past year) 2021-2022, PMS (for current year) 2022-2023.
		– Search option must also be provided to help search with the help of keyword in the record and they can also be able to Copy and Download(via Excel, CSV, PDF)
		– In the drop down option 10, 50, 100, 250, 500, all numeric are there, depending upon user's requirement they can view the entries.
		– It should contain the headers as S.No, title, self consolidated rate, Rep. Manager consolidated rate, reviewer remarks, HR remarks, BH remarks, Preview, Feedback and action.
		    - **Action** should have info tab which automatically generate the following details Employee (Id, name, department), Reporting Manager (Id, name, department), Reviewer (Id, name, department), HRBP (Id, name, department).
		    - Below this consolidated self rating should generate automatically, In Export excel tab the user can download the details which they have entered in add sheet.
		    - The details entered by the user in add sheet will display below the export excel tab and it shows self summary tab with save option.
		– All these above details is common for both the tabs(PMS for previous & current year), Add Self assessment is available only in PMS 2022-2023.

PMS - EMPLOYEE

PMS 2021- 2022 PMS 2022- 2023

SEARCH

S.NO TITLE SELF CONSOLIDATED RATE REP. MANAGER CONSOLIDATED RATE REVIEWER REMARKS HR REMARKS BH REMARKS PREVIEW FEEDBACK ACTION

INFO

EMP ID :	REP. MANAGER ID :	REVIEWER ID :	HRBP ID :
EMP NAME:	REP. MANAGER NAME:	REVIEWER NAME:	HRBP NAME:
EMP DEPT :	REP. MANAGER DEPT :	REVIEWER DEPT :	HRBP DEPT :

PMS 2022- 2023

CONSOLIDATED SELF RATING:

EXPORT EXCEL

S.NO KEY BUSINESS DRIVERS KEY RESULT AREAS MEASUREMENT CRITERIA SELF ASSESSMENT SELF RATING REP. MANAGER REMARKS REP. MANAGER RATING

PMS - REPORTING MANAGER

<table>
<tr><th>S.NO</th><th>MENU</th><th>WORKFLOW DESCRIPTION</th></tr>
<tr><td>2</td><td>Reporting Manager
– My self
– As Reporting manager
– As RM Analytics Report</td><td>Myself sub tab should contain the headers as common for both PMS 2021-2022 and PMS 2022-2023 S.No, title, self consolidated rate, Rep. Manager consolidated rate, reviewer remarks, HR remarks, BH remarks, Preview and action.
As Reporting Manager tab should Search option must also be provided to help search with the help of keyword.
– In the drop down option 10, 50, 100, 250, 500, all numeric are there, depending upon user's requirement they can view the entries.
- Action should have info tab which automatically generate the following details Employee (Id, name, department), Reporting Manager (Id, name, department), Reviewer (Id, name, department), HRBP (Id, name, department).
- Below this consolidated self rating, Rep. Manager Consolidated rating, Rep. Manager Recommendation should generate automatically, In Export excel tab the user can download the details which they have entered in add sheet.
- The details entered by the user in add sheet will display below the export excel tab and it shows self summary tab with save option.
– It should contain the following header as Employee name, Employee ID, title, employee consolidated rate, Rep. Manager consolidated rate, Rep. Manager Recommendation, Rep. Manager Status, BH status, Employee summary, Rep. Manager summary and action.
– All the above points are common for both the sub menus PMS 2021-2022 and PMS 2022-2023.
– PMS 2022-2023 need to be with the filter option as select Rep. Manager, select payroll status in drop down option along with apply, clear and export tab.</td></tr>
</table>

		As RM Analytics Report tab should display the Bell curve chart of the employee. Edit option should display the list of entries in drop down option 10, 50, 100, 250, 500, all numeric are there, depending upon user's requirement they can view the entries. – Search option must also be provided to help search with the help of keyword. – The list should have the header as Employee ID, Employee name and RM Rating.

PMS - REP. MANAGER

PMS 2021- 2022

PMS 2022- 2023

My self

As Reporting Manger

As RM Analytics report

Select Rep. Manager v

Select Payroll status v

APPLY

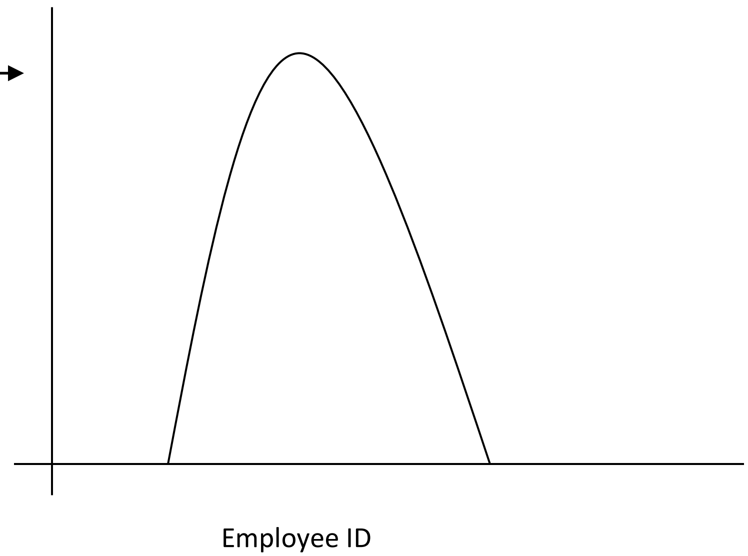
CLEAR

EXPORT

SEARCH

S.No Title Self Consolidated Rate Rep. Manager Consolidated Rate

Reviewer Remarks HR Remarks BH Remarks Preview Feedback Action



EDIT

☐ EMP ID EMP NAME RM RATING

PMS REVIEWER

S.NO	MENU	WORKFLOW DESCRIPTION
3	**Reviewer** – **My self** – **As Reporting manager** – **As RM Analytics Report** – **Reviewer**	**Myself**, **As Reporting Manager & As RM Analytics report** has to be same as that of the above Reporting manager tab. **As reviewer** tab should Search option must also be provided to help search with the help of keyword. – In the drop down option 10, 50, 100, 250, 500, all numeric are there, depending upon user's requirement they can view the entries. – It should contain the following header as S.No, Employee name, title, Rep. Manager consolidated rate, Action to be performed, PIP month, Increment %, Hike per month, New designation, New Rep. Manager, Reviewer status, BH status, Employee summary, supervisor summary and action. - **Action** should have info tab which automatically generate the following details Employee (Id, name, department), Reporting Manager (Id, name, department), Reviewer (Id, name, department), HRBP (Id, name, department). - Below this consolidated rating, Rep. Manager Consolidated rating, Rep. Manager Recommendation, Reviewer remarks should generate automatically, In Export excel tab the user can download the details which they have entered in add sheet. - The details entered by the user in add sheet will display below the export excel tab and it shows self summary tab with save option. – All the above points are common for both the sub menus PMS 2021-2022 and PMS 2022-2023. – PMS 2022-2023 need to be with the filter option as select Rep. Manager, select team member and select payroll status in drop down option along with apply, clear and export tab.

PERFORMANCE- REVIEWER

PMS 2021- 2022 PMS 2022- 2023

My self | As Reporting Manger | As RM Analytics report | As Reviewer

Download sample excel | Bulk Upload

Select Rep. Manager v | Select Team Member v

Select Payroll status v

APPLY | CLEAR | EXPORT | SEARCH

S.No Employee Id Emp name Title Rep. Manager Consolidated Rate Action to be performed PIP month Increment % Hike PM New designation New Rep. Manager Reviewer status BH status Employee summary Supervisor summary Action

PMS - BUSINESS HEAD

S.NO	MENU	WORKFLOW DESCRIPTION
4	**Business Head** – **As Reporting Manger** – **As Reviewer** – **As Business Head** – **Analytics report**	**As Reporting Manager tab** should have Select reviewer, Select payroll status in drop down option with Apply, clear and export tab. – The list should have the following headers as Employee name, Title, Rep. Manager Consolidated Rate, Rep. Manager status, BH status, Employee summary , Rep. Manager summary and action. **As Reviewer** tab should have Download sample file and Bulk upload option. – The filter option should contain Select Rep. Manager, Select employee, select payroll status in drop down option with Apply, clear and export tab. – The list should have the header option as S.No, Employee ID, Employee name, Title, Rep. Manager consolidated rate, Action to be performed, PIP month, Increment %, Hike per month, New designation, New Rep. Manager, Reviewer status, BH status, Employee summary, supervisor summary and action. **As Business Head** tab should have Download sample file and Bulk upload option. – The filter option should contain Select Rep. Manager, Select Reviewer in drop down option with advanced filter & export tab. – Advanced filter should have Select Payroll status, department, Reviewer, Rep. Manager, Employee, Gender, Band in drop down option with Apply and clear tab. – The list should have the header option as S.No, Employee ID, Employee name, Title, Rep. Manager consolidated rate, Action to be performed, PIP month, Increment %, Hike per month, New designation, New Rep. Manager, Reviewer status, BH status, Employee summary, supervisor summary and action. All the below points are common for both the sub menus PMS 2021-2022 and PMS 2022-2023. – **Search** option must also be provided to help search with the help of keyword. – In the drop down option 10, 50, 100, 250, 500, all numeric are there, depending upon user's requirement they can view the entries.

		– **Action** should have info tab which automatically generate the following details Employee (Id, name, department), Reporting Manager (Id, name, department), Reviewer (Id, name, department), HRBP (Id, name, department). - Below this consolidated rating, Rep. Manager Consolidated rating, Rep. Manager Recommendation, Reviewer remarks should generate automatically, In Export excel tab the user can download the details which they have entered in add sheet. - The details entered by the user in add sheet will display below the export excel tab and it shows self summary tab with save option. **Analytics Report** should have Rep. Manager consolidated rating, Select Manager, Rep. Manager, and grade in drop down option with clear tab. – Below the filter option the overall Bell curve chart should be displayed. – Self assessment status, Rep. Manager status, reviewer status, HR status, BH status pie chart to be displayed based on completion process as completed and in progress with %.

PERFORMANCE- BUSINESS HEAD

PMS 2021- 2022 PMS 2022- 2023

As Reporting Manger As Reviewer As Business Head Analytics Report

Select Reviewer v Select Rep. Manager v Download Sample file Bulk Upload

Advanced Filter Export

APPLY CLEAR

SEARCH

S.No Employee Id Emp name Title Emp Consolidated rate Rep. Manager Consolidated Rate Action to be performed PIP month Increment % Hike PM New designation New Rep. Manager Reviewer status BH status Employee summary Supervisor summary Action

Analytics Report

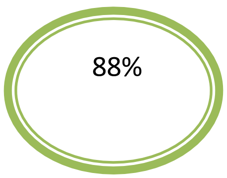
Rep. Manager Consolidated Rating

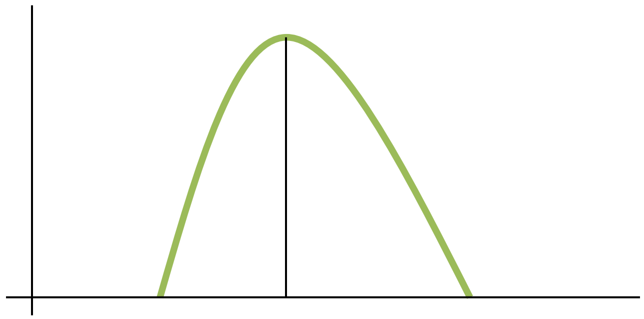
Select Manager v

Select Rep. Manager v

Select Grade v

CLEAR





Select Manager v

Select Rep. Manager v

Select Grade v

CLEAR

PMS - HR

<table>
<tr><th>S.NO</th><th>MENU</th><th>WORKFLOW DESCRIPTION</th></tr>
<tr><td>5</td><td>HR
– Myself
– As Rep. Manager
– As RM Analytics report
– As Reviewer
– As HR
– Org Level review
– Analytics report</td><td>Myself, As Reporting Manager & As RM Analytics report has to be same as that of the above Reporting manager tab.
As Reviewer has to be same that of reviewer tab.
As HR tab should have Download sample file and Bulk upload option.
– The filter option should contain Select Rep. Manager, Select Reviewer in drop down option with advanced filter & export tab.
– Advanced filter should have Select Payroll status, department, Reviewer, Rep. Manager, Employee, Gender, Band in drop down option with Apply and clear tab.
– The list should have the header option as S.No, Employee ID, Employee name, Title, Rep. Manager consolidated rate, Action to be performed, PIP month, Increment %, Hike per month, New designation, New Rep. Manager, Reviewer status, BH status, Employee summary, supervisor summary and action.
Org Level Review tab should have Advanced filter & Export option.
– Advanced filter should have Select Payroll status, department, Reviewer, Rep. Manager, Employee, Gender, Band in drop down option with Apply and clear tab.
– The list should have the following headers as PDF, Employee name, Employee ID, Goal name, QC status, Letter status, Gender, Grade, Department, Rep. Manager Consolidated rate, Reviewer remarks, Action to be performed, Increment %, hike per month and HR remarks.
Analytics Report should have Rep. Manager consolidated rating, Select Manager, Rep. Manager, and grade in drop down option with clear tab.
– Below the filter option the overall Bell curve chart should be displayed.
– Self assessment status, Rep. Manager Status, reviewer status, HR status, BH status pie chart to be displayed based on completion process as completed and in progress with %.</td></tr>
</table>

PMS- Quality check

S.NO	MENU	WORKFLOW DESCRIPTION
6	**Quality check**	**As Quality check tab** should have Download sample file and Bulk upload option. – The filter option should contain Select Rep. Manager, Select Reviewer in drop down option with advanced filter & export tab. – Advanced filter should have Select Payroll status, department, Reviewer, Rep. Manager, Employee, Gender, Band in drop down option with Apply and clear tab. – The list should have the headers as CTC, QC status, Employee name, Title, Rep. Manager consolidated rate, Current CTC, Increment %, Revised CTC, Basic PM, Basic PA, AHRA PM, AHRA PA, HRA PM, HRA PA, Other allowance PM, Other allowance PA, Conv. PM, Conv. PA, Special allowance PM, Special allowance PA, LTA PM, LTA PA, Medical allowance PA, Medical allowance PA, F. vehicle PM, F. Vehicle PA, PF wages, Gross PM, Gross PA, PF PM, PF PA, ESI PM, ESI PA, Gratuity PM, Gratuity PA, Bonus PM, Bonus PA, Statu. Total PM, Statu. Total PA, CTC PM, CTC PA, PF Emp. PM, PF Emp. PA, ESI Emp PM, ESI Emp PA, PT PM, PT PA, Take home PM, Take home PA.

TRAVEL REQUEST - EMPLOYEE LOGIN

S.NO	MENU	WORKFLOW DESCRIPTION
1	**Travel request** – **Travel request Form** – **Request details**	**Travel request** Form should contain Travel request and request details tab. – **Travel request** tab need to be with Mode of travel, Travel location as drop down option, travel start date & travel end date with updated calendar, Travel purpose as input field. • Room rent, Daily allowance, Food expense, Cab value options should have common tabs as Amount, No.Of.Days and Total should auto calculate. Ticket amount approximate tab as input field, Total amount for travel request should be displayed. • Travel advance tab in drop down option if yes, amount to be mentioned and submitted. – In **Request Details**, the list should have shown entries on numberings as 10, 50,100,250 and 500. • The search tab must have help to search based on keywords. • The list can be downloaded in PDF, CSV, Excel format, Copy, Print and Colvis option. • Request details should have the following headers as S.No, Action, Ticket ID, Employee ID, Employee name, Remarks, BH status, Rep. Manager status, Reviewer status , Travel accounts status and travel support status.

Travel request

Request details

Mode of travel

Travel start date

Travel end date

Travel location

Travel Purpose

SEARCH

S.NO ACTION TICKET ID EMP ID EMP NAME REMARKS BH STATUS REP. MANAGER STATUS REVIEWER STATUS TRAVEL ACCOUNTS STATUS TRAVEL SUPPORT STATUS

Room rent

Amount | No. of. days | Total

Daily Allowance

Amount | No. of. days | Total

Cab value

Amount | No. of. days | Total

Food expense

Amount | No. of. days | Total

Tickets Amounts (Approx)

TOTAL:

Travel Advance v

Amount

Submit

TRAVEL REQUEST- REP. MANAGER, REVIEWER

S.NO	MENU	WORKFLOW DESCRIPTION
1	**Rep. Manager** – **Travel request** – **As Supervisor**	**Travel request** tab is same as that of employee login **As Supervisor** - Travel request approval page should contain Travel Approval and Travel advance approval tab. – **Travel approval and Travel advance approval**, the list should have shown entries on numberings as 10, 50,100,250 and 500. • The search tab must have help to search based on keywords. • The list can be downloaded in PDF, CSV, Excel format, Copy, Print and Colvis option. • The list should have the following headers as S. No, Action, Ticket ID, Employee ID, Employee name, Remarks, BH status, Rep. Manager status, Reviewer status , Travel accounts status and travel support status.
2	**Reviewer** – **Travel request** – **As Supervisor** – **As Reviewer**	**Travel request & As Supervisor** tab is same as that of employee login **As Reviewer** - Travel request approval page should contain Travel Approval and Travel advance approval tab. – **Travel approval and Travel advance approval,** the list should have shown entries on numberings as 10, 50,100,250 and 500. • The search tab must have help to search based on keywords. • The list can be downloaded in PDF, CSV, Excel format, Copy, Print and Colvis option. • The list should have the following headers as S. No, Action, Ticket ID, Employee ID, Employee name, Remarks, BH status, Rep. Manager status, Reviewer status , Travel accounts status and travel support status.

AS SUPERVISOR & AS REVIEWER

Travel Approval

Travel Advance Approval

COPY | EXCEL | CSV | PDF | PRINT | COLVIS

SEARCH

S.NO ACTION TICKET ID EMP ID EMP NAME REMARKS BH STATUS REP. MANAGER STATUS REVIEWER STATUS TRAVEL ACCOUNTS STATUS TRAVEL SUPPORT STATUS

TRAVEL REQUEST – BUSINESS HEAD

S.NO	MENU	WORKFLOW DESCRIPTION
1	**Business Head** – **Travel request** – **As Reviewer** – **Request BH Approval**	**Travel request & As Reviewer** tab is same as that of employee login **BH Travel Request approval** tab the list can be downloaded in PDF, CSV, Excel format, Copy, Print and Colvis option. • The search tab must have help to search based on keywords. • The list should have the following headers as S. No, Action, Ticket ID, Employee ID, Employee name, Remarks, BH status, Rep. Manager status, Reviewer status , Travel accounts status and travel support status.

BH Travel Request Approval

COPY | EXCEL | CSV | PDF | PRINT | COLVIS

SEARCH

S.NO ACTION TICKET ID EMP ID EMP NAME REMARKS BH STATUS REP. MANAGER STATUS REVIEWER STATUS TRAVEL ACCOUNTS STATUS TRAVEL SUPPORT STATUS

TRAVEL REQUEST APPROVAL- TRAVEL SUPPORT & TRAVEL ACCOUNTS

S.NO	MENU	WORKFLOW DESCRIPTION
1	**Travel support & Travel accounts**	**Travel Request approval,** the list should have shown entries on numberings as 10, 50,100,250 and 500. • The search tab must have help to search based on keywords. • The list can be downloaded in PDF, CSV, Excel format, Copy, Print and Colvis option. • It should contain the following headers as S.No, Action, Ticket ID, Employee ID, Employee name, Remarks, BH status, Rep. Manager status, Reviewer status, Travel accounts status and status.

TRAVEL REQUEST APPROVAL

COPY | EXCEL | CSV | PDF | PRINT | COLVIS

SEARCH

S.NO ACTION TICKET ID EMP ID EMP NAME REMARKS BH STATUS REP. MANAGER STATUS REVIEWER STATUS TRAVEL ACCOUNTS STATUS STATUS

BUSINESS CLAIMS

S.NO	MENU	WORKFLOW DESCRIPTION
1	**Travel claims**	If employee submits the bill after 7days it should pop up as late submission upload L1 approval tab. After submitting L1 approval tab the claims page will enable to employees. **Travel claims** should have Pending and Completed tab. **Pending tab**, the list should have shown entries on numberings as 10, 50,100,250 and 500. • The search tab must have help to search based on keywords. • The list can be downloaded in PDF, CSV, Excel format, Copy, Print and Colvis option. • It should contain the following headers as S.No, Action, Ticket ID, Employee ID, Employee name. • Through Action Tab the employee can submit their travel bills on respective fields. If any deviations it will move to BH approval. **Completed tab**, the list should have shown entries on numberings as 10, 50,100,250 and 500. • The search tab must have help to search based on keywords. • The list can be downloaded in PDF, CSV, Excel format, Copy, Print and Colvis option. • It should contain the following headers as S.No, Action, Ticket ID, Employee ID, Employee name, BH status, Travel accounts status and Travel claims status. • name. • Through Action Tab the employee can submit their travel bills on respective fields. If any deviations it will move to BH approval. **Completed tab**, the list should have shown entries on numberings as 10, 50,100,250 and 500. • The search tab must have help to search based on keywords. • The list can be downloaded in PDF, CSV, Excel format, Copy, Print and Colvis option. • It should contain the following headers as S.No, Action, Ticket ID, Employee ID, Employee name, BH status, Travel accounts status and Travel claims status.

TRAVEL REQUEST APPROVAL

PENDING

COMPLETED

COPY | EXCEL | CSV | PDF | PRINT | COLVIS

SEARCH

S.NO ACTION TICKET ID EMP ID EMP NAME

COPY | EXCEL | CSV | PDF | PRINT | COLVIS

SEARCH

S.NO ACTION TICKET ID EMP ID EMP NAME BH STATUS TRAVEL ACCOUNTS STATUS TRAVEL CLAIMS STATUS

ASSET - TL:

S.NO	MENU	DESCRIIPTION
1.	**Asset allocation**	**Asset tab** displays asset allocation with advance filter it contain select Emp id, select employee, select asset type, select designation, BH status , IT infra status, in dropdown option and Doj in updated calendar with clear tab. – Below it should contain the show entries on the numbering 10, 25, 50 and 100.Search tab helps to find the entries based on keywords. – The headers should contain action, S.No, Employee id, name, department, designation, joining date, pre on boarding, BH status, BH remark and IT infra status. – Action option pop up allocate asset with select asset type, Mac category in dropdown option business justification in input field with close tab.

ASSET ALLOCATION

ADVANCED FILTER

Select Emp ID v | Select Employee v | Select Asset type v | Select Designation v

BH status v | IT Infra status v | DOJ v

CLEAR

SEARCH

Action S.No Emp Id Name Department Designation Joining Date Pre On Boarding BH status BH remarks IT Infra status

BH LOGIN:

S.NO	MENU	DESCRIPTION
1.	**Asset allocation**	**Asset allocation** should contain two tabs are as reporting manager and as business head. And also contain advanced filter should have select employee id, select employee, select asset type, select designation, BH status, IT infra status in drop down option and Doj in updated calendar with clear tab. – **Reporting manager** must contain the show entries and Search option. - Below it contain the header option as action, S.No, employee Id, name, department, designation, joining date, pre on boarding, BH status, BH remark, IT infra status. – **Business head** should contain show entries and search option, below it must contain header option as action, S.No, Employee id, name department, designation, joining date, pre on boarding, BH status, BH remark, IT infra status.

Asset allocation

As Reporting Manager

As Business Head

ADVANCED FILTER

Select Emp ID v

Select Employee v

Select Asset type v

Select Designation v

BH status v

IT Infra status v

DOJ v

CLEAR

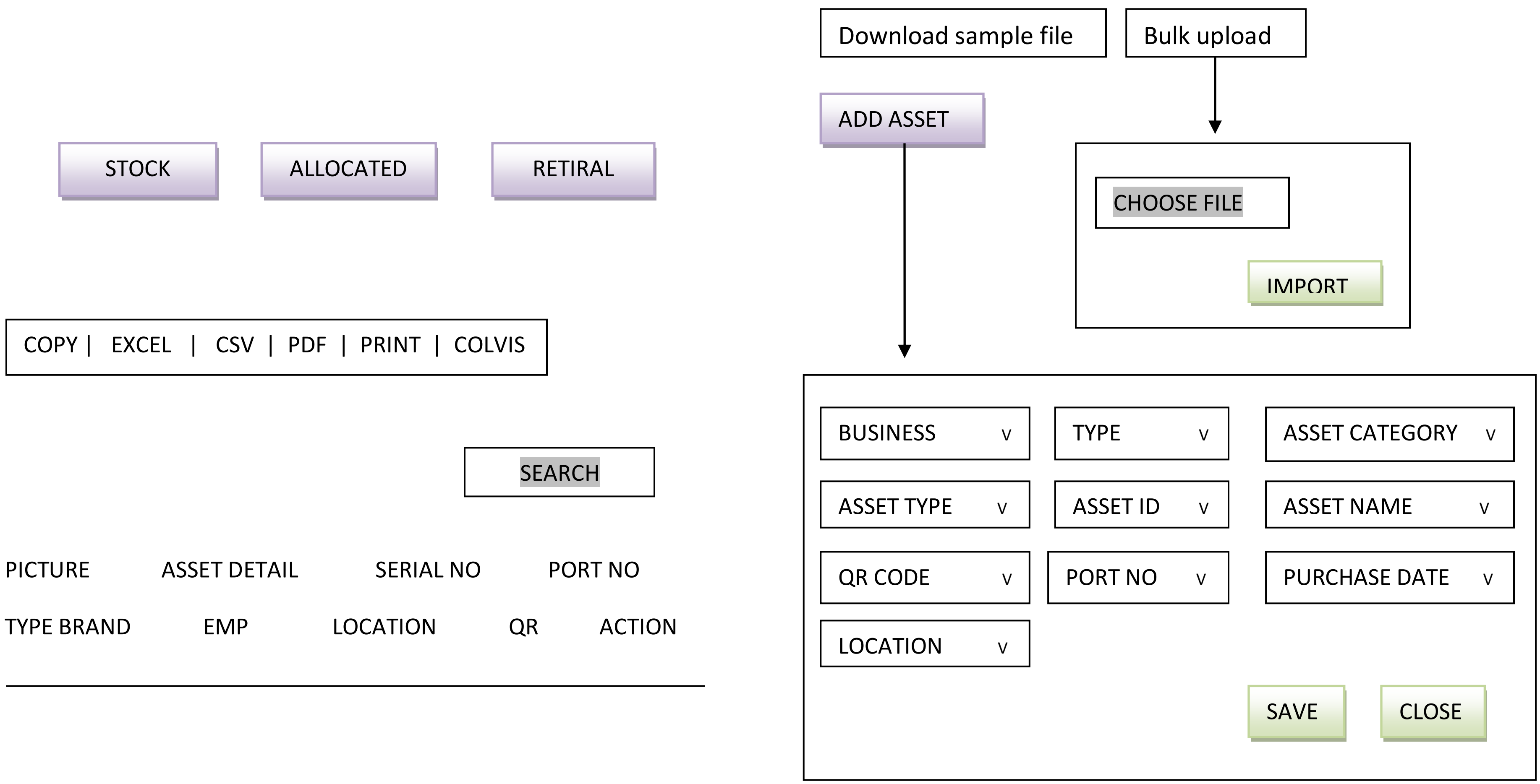
SEARCH

Action S.No Emp Id Name Department Designation Asset type Category Supervisor Business Justification Joining Date

IT INFRA:

S.NO	MENU	DESCRIPTION
1.	**Asset list**	**Asset list** should contain three tabs like **stock, allocated, retiral** it must have show entries and search option and also have the downloadable format of copy, excel, CSV, PDF, print and colvis. – Below it must contain headers as picture, asset detail, and serial no, port no, type and brand EMP, location, QR and action. – Asset list must contain asset category and asset type in drop down option. – **Bulk uploads** with file chose option with upload and close tab. – **Add asset** tab pop up business, type, asset category, asset type, location, brand, SPOC, asset allocate in drop down option, asset name, port no, QR code, cost center, cost, asset domain, camera pixel, model, serial no, version, user list , vendor, license key, IP address, Mac address , CPU laptop model, CPU laptop configuration, CPU laptop si#, RAM, HDD-SSD, mouse, OS, Monitor size, monitor serial, keyboard, long description in input field option. Purchase date, expiry date and warranty period in updated calendar, picture in chosen file. Quantity in increase decrease option. Charger and bag in checklist with save and close tab. – In **Download Sample File** the sample for employee details must be in predefined and be downloadable in excel format. – The above points are common for all the three tabs Stock, Allocated and retiral.

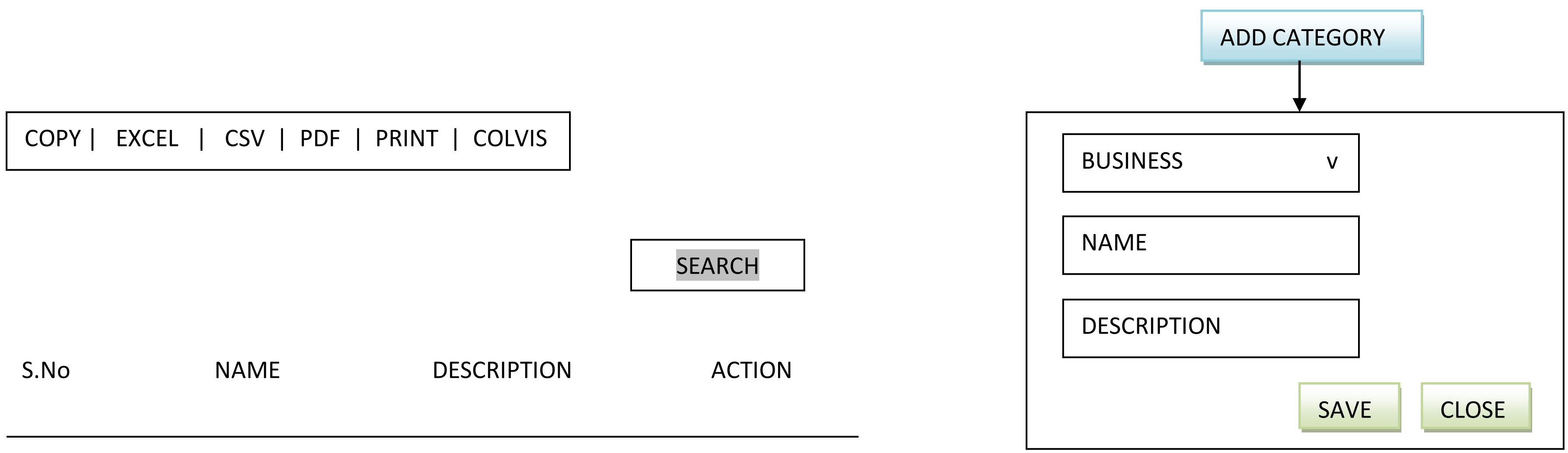
ASSET LIST


Download sample file
Bulk upload
ADD ASSET
STOCK
ALLOCATED
RETIRAL
CHOOSE FILE
IMPORT
COPY | EXCEL | CSV | PDF | PRINT | COLVIS
SEARCH
PICTURE
ASSET DETAIL
SERIAL NO
PORT NO
TYPE BRAND
EMP
LOCATION
QR
ACTION
BUSINESS v
TYPE v
ASSET CATEGORY v
ASSET TYPE v
ASSET ID v
ASSET NAME v
QR CODE v
PORT NO v
PURCHASE DATE v
LOCATION v
SAVE
CLOSE

ASSET CATEGORY

S.NO	MENU	DESCRIPTION
1	**Asset category**	**Asset category list** with **add category** tab it pop up add category with business in drop down, name and description in input field option with save and close tab. – Below it contain show entries and search option and also have the downloadable format of copy, excel, CSV, PDF, print and colvis. Also should have the headers s.no, name, description and action option contain edit and delete option. – Edit pop up edit category it should contain business in drop down option and name and description in input field option with update and close tab.

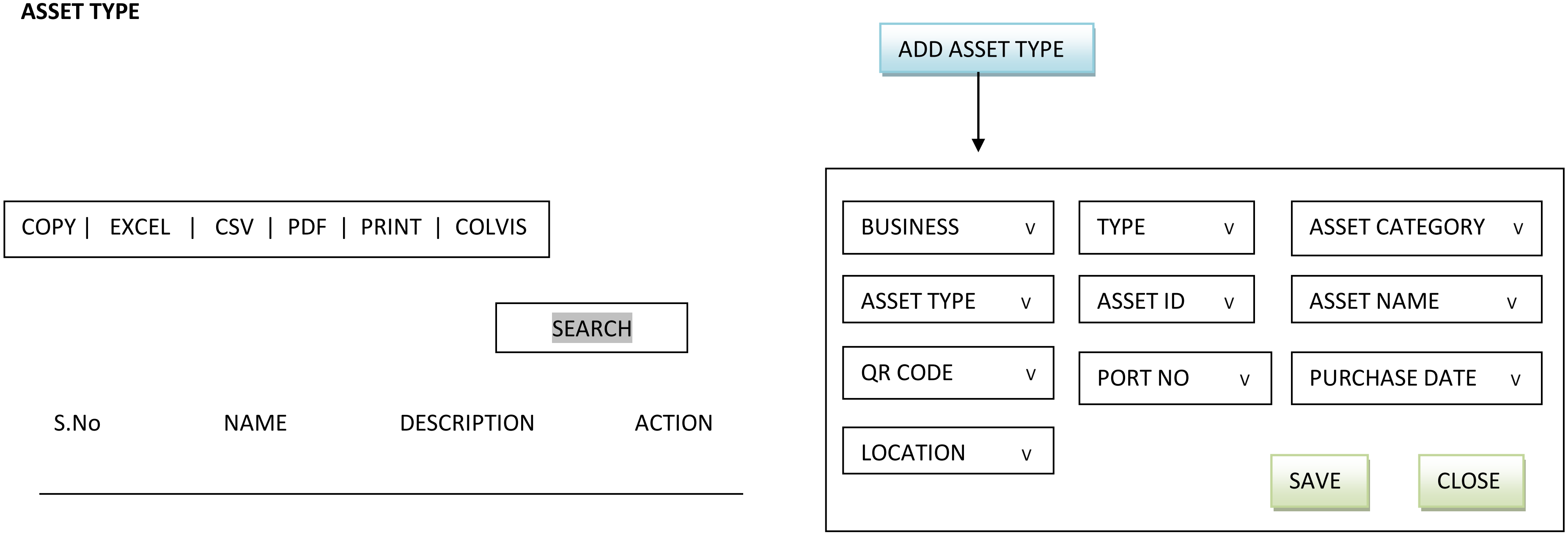
HOMEPAGE



ASSET TYPE

S.NO	MENU	DESCRIPTION
1	**Asset type**	**Asset type** should contain add asset type tab it pop up category name in drop down, name and description in input field option with save and close tab. – Below it must contain shown entries and search option and also contain the downloadable format copy, excel, CSV, PDF, print, colvis. – Asset type should contain headers as S.No, name, description and action with edit and delete option.

ASSET TYPE



BRAND LIST

S.NO	MENU	DESCRIPTION
1	**Brand list**	**Brand list** should contain add brand tab it pop up with name and description in input field option with save and close tab. – Below it must contain show entries, search option and downloadable format. – Brand list should contain headers as S.No, name, description and action with edit and delete option. Action pop up edit brand name with name and description with input field option with save and close tab.

BRAND LIST

ADD BRAND

COPY | EXCEL | CSV | PDF | PRINT | COLVIS

SEARCH

S.No	NAME	DESCRIPTION	ACTION

NAME

DESCRIPTION

SAVE CLOSE

SOFTWARE REPORT

S.NO	MENU	DESCRIPTION
1	**Software report**	**Software list** display two tabs - close to expiry/expired and all. Both contain show entries and search option. And also should have downloadable format. – Below it must contain headers are id, picture, asset detail, type, brand, employee, expiry date and action.

SOFTWARE REPORT

CLOSE TO EXPIRY/EXPIRED | ALL

COPY | EXCEL | CSV | PDF | PRINT | COLVIS

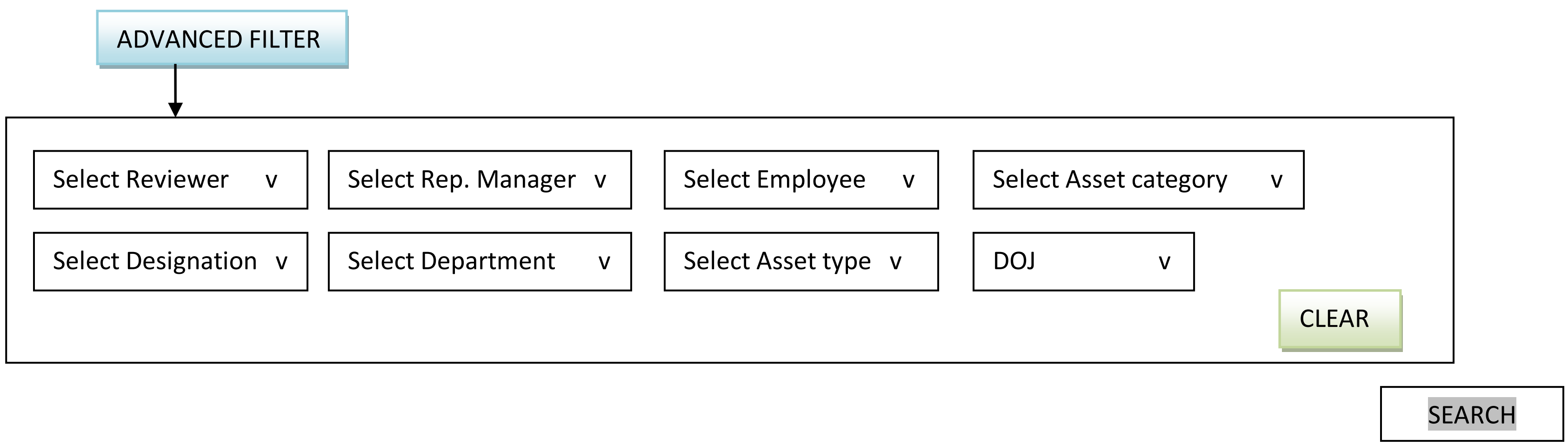
SEARCH

ID	PICTURE	ASSET DETAIL	TYPE	BRAND	EMPLOYEE	EXPIRY DATE	ACTION

ASSET ALLOCATION

S.NO	MENU	DESCRIPTION
1	**Asset allocation**	**Asset allocation** contain advanced filter tab it pop up select reviewer, select rep manager, select employee, select department, select designation, select asset type and select asset category in drop down option and Doj in updated calendar with clear tab. – It also contain show entries and search option, below it contain headers as action, S.No, employee id, name, department, designation, joining date, asset type, category, supervisor, business justification and pre on boarding.

ASSET ALLOCATION

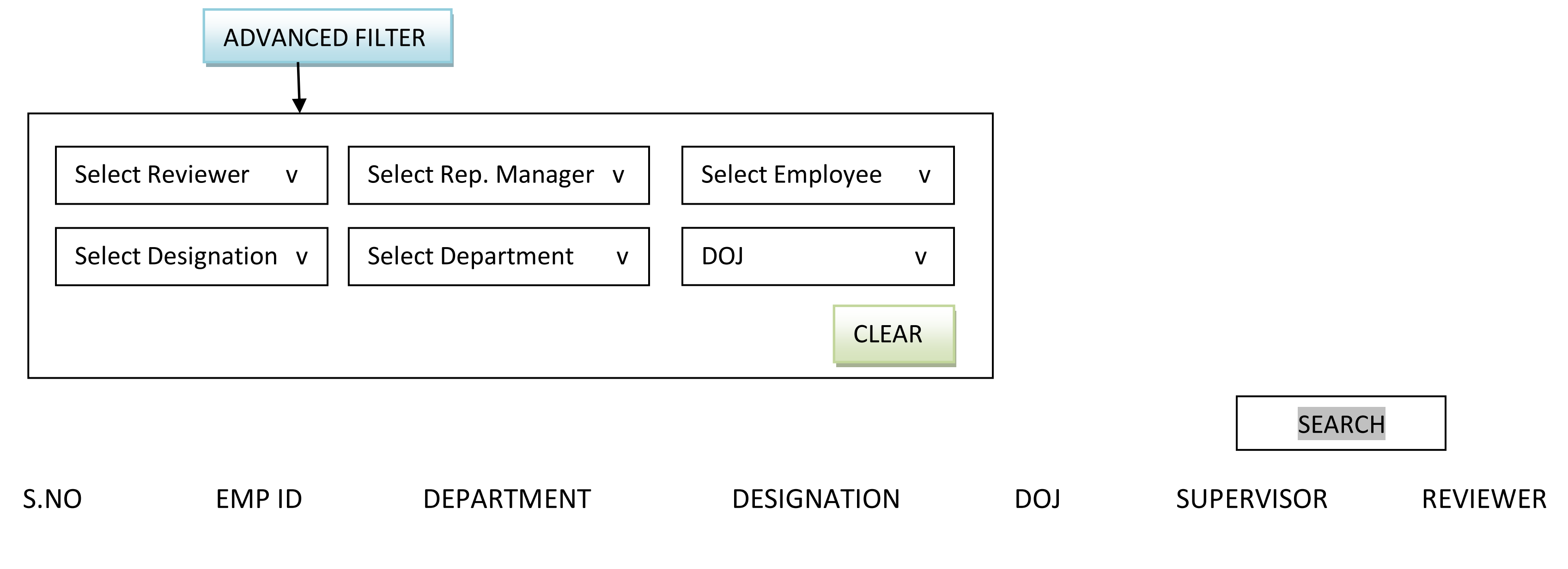


S.No Employee Id Name Department Designation Joining Date Asset Type Category Supervisor Business Justification Pre On Boarding

ASSET PROJECTION

S.NO	MENU	DESCRIPTION
1	**Asset projection**	**Asset projection** should display advance filter which it should contain select reviewer, select rep. manager, select employee, select department and select designation in drop down option and Doj in updated filed with clear tab. – Below it should contain show entries and search option and it must contain headers as S.No, Employee id, name, department, designation, Doj, supervisor and reviewer.

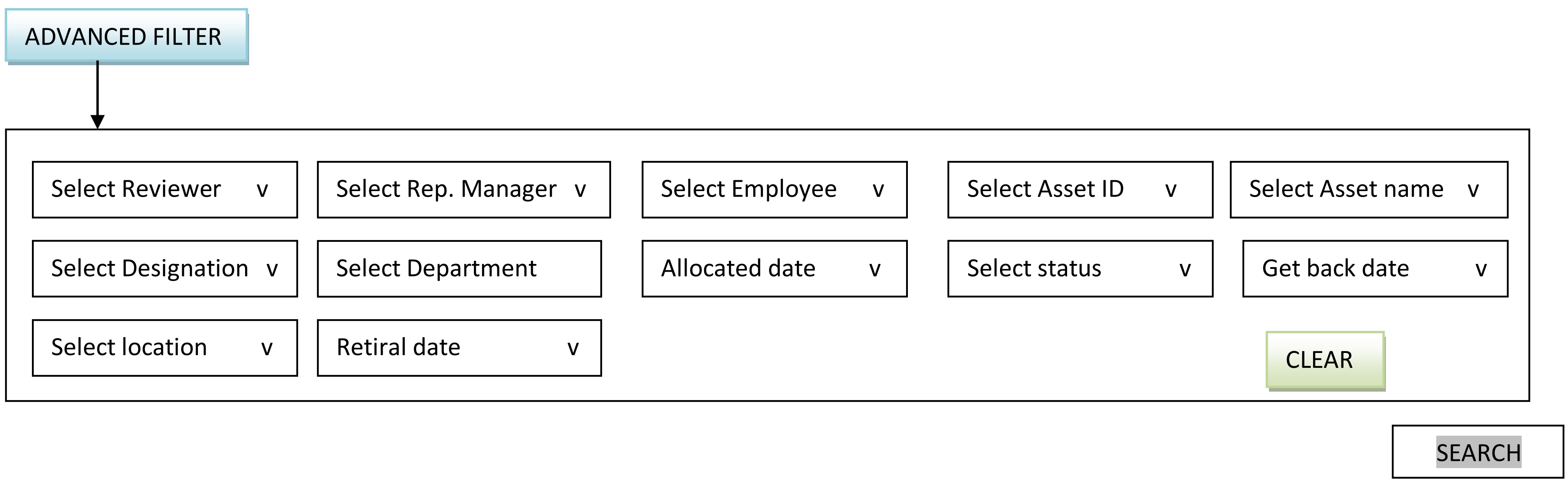
ASSET PROJECTION



ASSET HISTORY

S.NO	MENU	DESCRIPTION
1	**Asset history**	**Asset history** should display advance filter which it should contain select asset id, select asset name, select reviewer, select rep. manager, select employee, select department, select designation, select location, select status in drop down option and allocated date, get back date, retiral date in updated calendar with clear tab. – Below it should contain show entries and search option and it must contain headers as S.No, asset id, asset name, employee id, name, department, designation, supervisor, reviewer, location, status, allocated date, get back date and retiral date.

HOMEPAGE

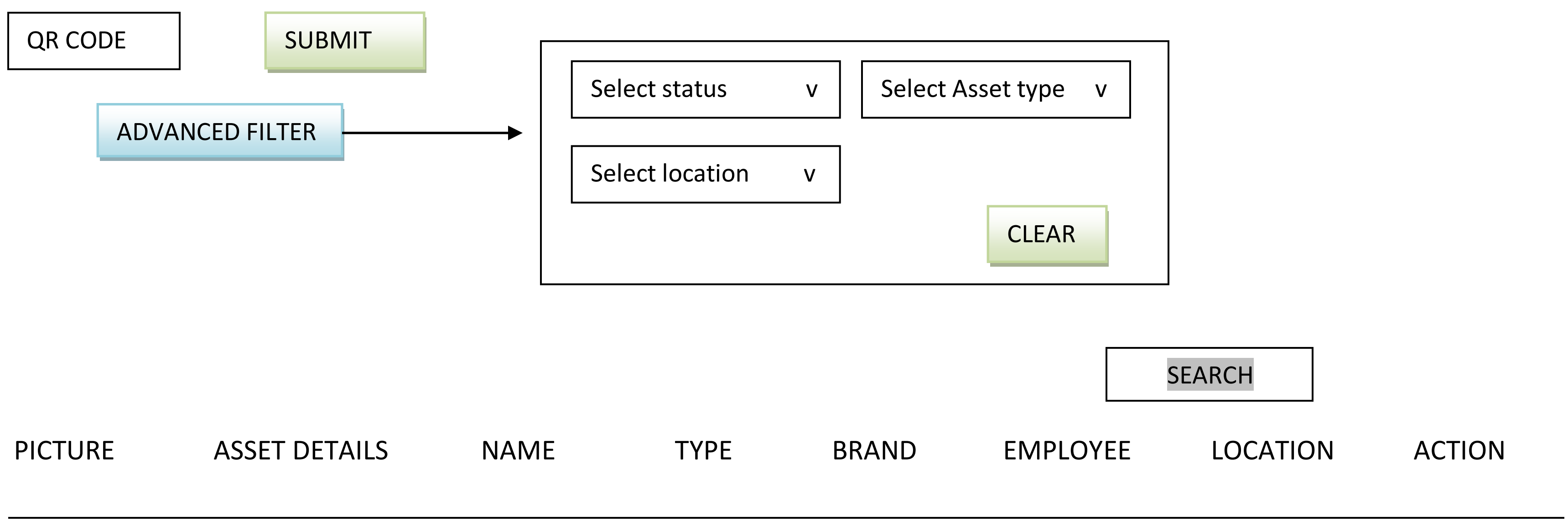


S.No Asset Id Asset Name Emp Id Name Department Designation Supervisor Reviewer Location Status Allocated Date Get Back Date Retiral Date

IA REPORT

S.NO	MENU	DESCRIPTION
1	IA report	**IA report** should contain QR code tab with submit option and also with filter option should pop up Select status, location and asset type in drop down option with clear tab. – Below it should contain show entries and search option and it must contain headers as Picture, asset details, name, type, brand, employee, location and action.

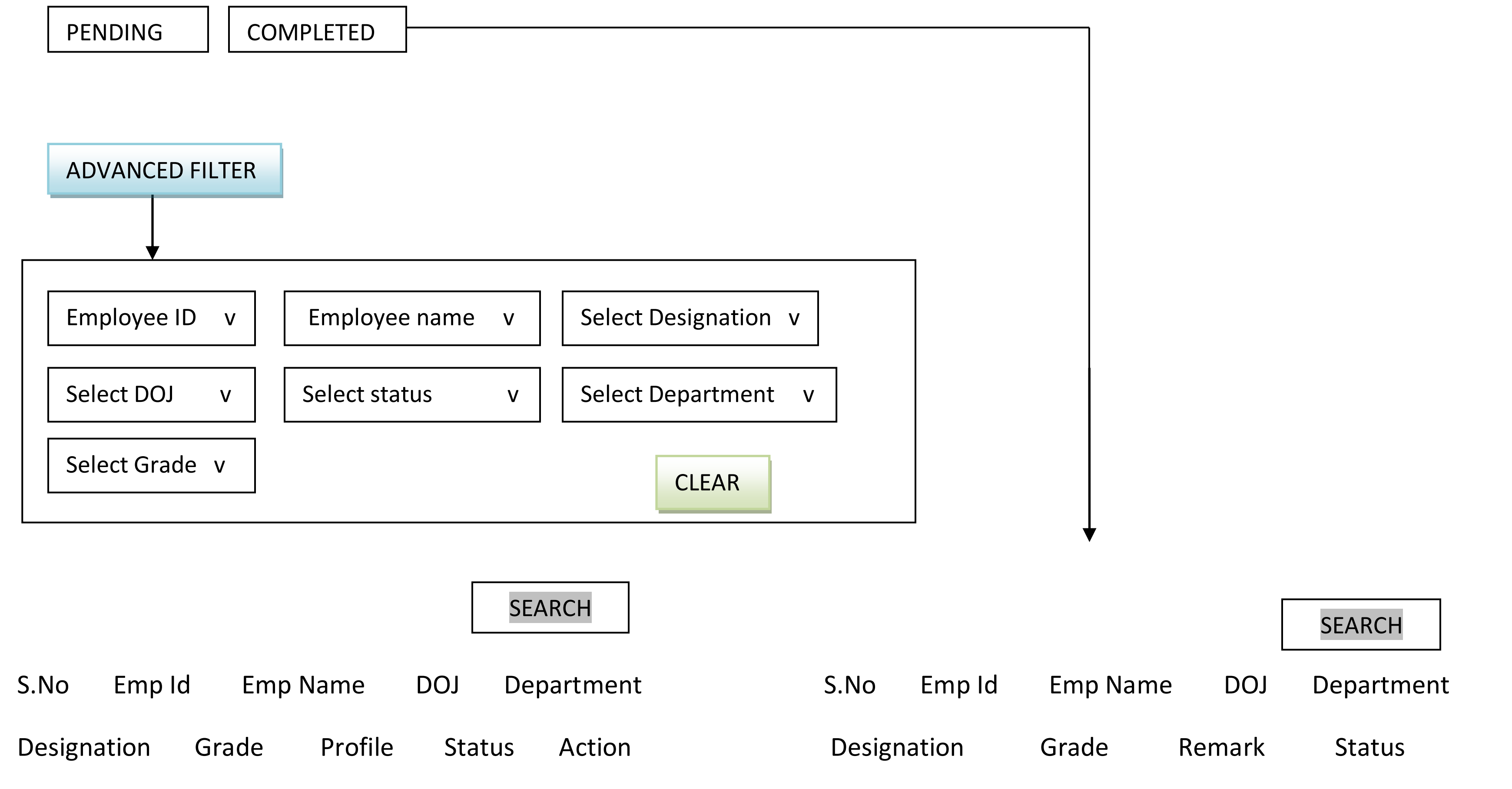
HOMEPAGE



BGV

S.NO	MENU	WORKFLOW DESCRIPTION
1	**BGV**	In BGV menu the employee documents need to be shared to the vendor through mail after processing the vendor will give feedback result to HR. – BGV tab should contain Pending and Completed tab. Both the tab need to be with advanced filter, Employee id, Employee name, DOJ, department, designation, grade, status with clear tab. – **Pending Tab** should have the following headers as S.No, Employee id, Employee name, DOJ, department, designation, grade, Profile, Status and action. • Action should contain Assign and Feedback tab. Assign tab should pop up To and CC tab as input field with submit tab. Feedback tab should pop up status as drop down option and remarks as input field. – **Completed tab** should have the following header as S.No, Employee id, employee name, DOJ, department, designation, Grade, Remark and status.

BGV


PENDING
COMPLETED
ADVANCED FILTER
Employee ID v
Employee name v
Select Designation v
Select DOJ v
Select status v
Select Department v
Select Grade v
CLEAR
SEARCH
S.No Emp Id Emp Name DOJ Department
Designation Grade Profile Status Action
SEARCH
S.No Emp Id Emp Name DOJ Department
Designation Grade Remark Status