Software Requirements Specification

Of

HRIS and Payroll Application, Marie Stopes Bangladesh

Submitted to:

Marie Stopes Bangladesh

Submitted by:

BASE Limited



**Revision History**

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Version** | **Description** | **Author** |
| 07Aug 2016 | Draft V1.0 | Initial Draft | Amit Biswas(BASE)  SulataSaha (BASE)  Md. Shazadul Islam (BASE) |
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**1.0. Introduction**

## ***1.1. Purpose***

The purpose of this document is to present a detailed description of the HRIS and Payroll Application of Marie StopesBangladesh. It will explain the purpose and features of the system, the interfaces of the system, what the system will do, and the constraints under which it must operate and how the system will react to external stimuli. This document is intended for both the stakeholders and the developers of the system and will be proposed to the Marie StopesBangladesh for its approval.

## ***1.2. Scope of Project***

This application will be a web enabled System for HRIS and Payroll Application. This system will be designed to maximize the employee’s productivity by providing tools to assist in automating the HRIS and Payroll process, which would otherwise have to be performed manually. By maximizing the administrative work efficiency and production the system will meet the needs while remaining easy to understand and use.

This system is designed to allow a departmental head/ manager to manage and review with a group of employee’s HRIS and Payroll information. The system also contains a relational database containing a list of Employees, Policies and User, etc.

## ***1.3. Glossary***

|  |  |
| --- | --- |
| **Term** | **Definition** |
| BASE | BASE limited. |
| MSB | Maries Stopes Bangladesh |
| MSCS | Maries Stopes Clinical Society |
| HRIS | Human Resource Information System |
| PAYROLL | Payroll System |
| DB | HRIS and Payroll Integrated Database |
| STAKEHOLDER | Any person with an interest in the project who is not a developer. |
| EMPLOYEE | Employee of Save the Children in Bangladesh |
| SRS | Software Requirement Specification |
| SUPERVISOR | Supervisor user of the software |
| SUPERVISEE | Employees under the supervisor |
| SUPER ADMIN | Administrative user of Both HRIS and Payroll System with full authentication |
| ADMIN | Departmental Administrator with some specific administrative authentication to the system |
| EMPLOYEE | Ordinary user with limited authentication to the system |
| GUI | Graphical User Interface |

***1.4. References***

IEEE. *IEEE Std 830-1998 IEEE Recommended Practice for Software Requirements Specifications.*

## ***1.5. Overview of Document***

The next chapter, the Overall Description section, of this document gives an overview of the functionality of these products. It describes the informal requirements and is used to establish a context for the technical requirements specification in the next chapter.

The third chapter, Requirements Specification section, of this document is written primarily for the developers and describes in technical terms the details of the functionality of the product.

Both sections of the document describe the same software products in its entirety, but are intended for different audiences and thus use different language.

# **2.0. Overall Description**

# ***2.1 System Environment***



# **Fig: 2.A (System Environment)**

The HRIS and PAYROLL will have four active actors.

* The SUPER ADMIN user will configure the system as per organization policy. Both the HRIS and PAYROLL will have only one SUPER ADMIN.
* ADMIN user will be able to change and configure the policy and data for which S/he has authentication from SUPER ADMIN. ADMIN will be to view all the data under his/her department.
* SUPERVISOR/LINE MANAGER/ DEPARTMENT HEAD will be able to do only the operations that S/he has authentication form SUPER ADMIN. S/He will able to insert, update or view the data of his own and his supervisee.
* EMPLOYEE will be the ordinary user who will be able to do only the jobs as specified by the SUPER ADMIN or ADMIN.

## ***2.2 Functional Requirements Specification***

This section outlines the use cases for each of the actors separately. The EMPLOYEE has multiple processes, the SUPERVISOR will have some primary processes and the Administrative actor (SUPER ADMIN and ADMIN) will also have multiple processes in this system.

***2.2.1 EMPLOYEE Use Case***



**Brief Description:**

* EMPLOYEE will be able to access ESS by clicking on Joining at MSB button.
* Actor will able to input his/her own personal as well as edit address & other information.
* Actor will able to enter his/her presence at desk as well as movement from desk information.
* EMPLOYEE will be able to use leave application, view the leave records.
* Actor can view his/her monthly attendance as well as appraisal report.
* S/he can view monthly Payslip, PF, IT, loan status report.
* S/he can view leave & training calendar.
* Staff himself can post recruitmentinformation for any vacant position.
* S/he will be able to view all MSB policies.

**Initial Step-By-Step Description**

Before this use case can be initiated, the employee has already accessed the software.

Access ESS

1. **Input personal information**
2. The EMPLOYEE click on Personal Info button to input/edit his/her personal information
3. Actor can also modify his NTK, Education, previous experience, Emergency contact, and Witness information by clicking different button on his/her ESS board.
4. **Input Staff Movement**
5. S/he will have the access to enter his/her presence status.
6. Actor can modify presence staff when s/he will return to his/her desk.
7. Staff can enter his/her movement from desk information by clicking on a button.
8. **Apply for leave**
9. The EMPLOYEE chooses buttonto leave apply.
10. The system displays the choices to select date and type of leave to apply.
11. Completes application and wait for an approval
12. System will generate a mail to the supervisor and supervisee both request for leave approval.
13. Actor will also have a list of pending application to edit before approval.
14. After approval/reject/modification system will generate a mail for both.
15. **View Leave Records**
16. The Employee chooses button to view his/her own leave records.
17. The system presents the abstract of his/her leave status.

***2.2.2 SUPERVISOR/ LINE MANAGER/ DEPARTMENT HEAD Use Case***



**Brief Description:**

SUPERVISOR will be able to use the following.

* Leave application for his/her own as well as his/her supervisee
* View the leave records of his/her own as well as his/her supervisee
* Approve the leave for his/her supervisee
* Adjust Attendance for his/her supervisee
* Approve Timesheet for his/her supervisee
* Approve job for recruitment posting for his/her supervisee
* Asses training need from annual performance appraisal &Set training calendar for his/her supervisee

**Initial Step-By-Step Description**

1. **Apply for leave**
2. The SUPPERVISOR chooses button to leave apply.
3. The system displays the choices to select date and type of leave to apply.
4. The System also displays an admin section to apply for on behalf of a supervisee.
5. Completes application and wait for an approval
6. System will generate a mail to the supervisor and supervisee both request for leave approval.
7. Actor will also have a list of pending application of his/her own as well as selected supervisee to edit before approval.
8. After approval/regret/modification system will generate a mail for both.
9. **View Leave Records**
10. The SUPEVISOR chooses link to view his/her own as well as supervisee leave records.
11. The system presents the abstract of his/her as well as supervisee leave status.
12. **Leave Approval**
13. The SUPEVISOR chooses link to approve his/her supervisee leave application.
14. The actor will able to view the application before approve.
15. Actor can either approve a leave or regret it or can cancel it.
16. After the approval a mail will be generated to the both notifying about the leaveapproval.
17. **Time Sheet Approval**
18. The SUPEVISOR chooses link to approve his/her supervisee month wise timesheet.
19. Actor can his/her supervisee attendance.
20. **Job Approval**
21. The actor will able to view all pending job requisition before approve.
22. Actor can either approve a job or regret it or can cancel it.
23. After the approval a mail will be generated to the notifying respective stakeholder about the job approval.
24. **TNA(Training Need Assessment)**
25. The SUPERVISOR will be able to view his/her supervisee development need from APA.
26. S/he set training calendar depending on his/her supervisee TNA

***2.2.3 ADMIN Use Case***



**Brief Description:**

ADMIN will be able to use the following.

* Enter employees HR actions as well as transitions.
* Enter employee’s confirmation appraisal as well as annual performance appraisal.
* Leave application for his/her own, supervisee as well as employee under his/her office.
* View the leave records of his/her own, supervisee as well as employee under his/her office.
* Approve the leave for the supervisee as well as employee under his/her office.
* Adjust Attendance for his/her supervisee & Approve Timesheet for his/her supervisee
* Enter training schedule & budget under his/her provision.
* Create User & user permission.
* Access to HR Dashboard

**Initial Step-By-Step Description**

1. **Input HR Action**
2. The ADMIN chooses different action link to enter all HR action.
3. S/he can also enter employee transition as well as separation information.
4. **Apply for Appraisal**
5. ADMIN chooses link to enter technical as well as non-technicalstaff’s confirmation appraisal.
6. Actor will also choose another link to enter annual performance appraisal.
7. **Apply for leave**
8. The ADMIN chooses link apply for a leave.
9. The system displays the choices to select date and type of leave to apply.
10. The System also displays an admin section to apply for a for on behalf of a supervisee or employee under his/her office.
11. Completes application and wait for an approval
12. System will generate a mail to the supervisor and supervisee both request for leave approval.
13. Actor will also have a list of pending application of his/her own as well as selected supervisee or employee under his/her office to edit before approval.
14. After approval/reject/modification system will generate a mail for both.
15. **View Leave Records**
16. The ADMIN chooses link to view his/her own as well as supervisee or employee under his/her office leave records.
17. The system presents the abstract of his/her as well as supervisee or employee under his/her provision leave status.
18. **Leave Approval**
19. The ADMIN chooses link to approve his/her supervisee or employee under his/her provision leave application.
20. The actor will be able to view the application before approve.
21. Actor can either approve a leave or regret it or can cancel it.
22. After the approval a mail will be generated to the applicant and supervisor notifying about the leave approval.
23. **Time Sheet Correction**
24. The ADMIN chooses link to manage Time sheet for each month with OT (if applicable).
25. Time Sheet Policy has to set for every month.
26. Staff Attendance information integrates with Device Attendance Data.
27. Attendance Log info for all employees.
28. Time Sheet Process integrates with Attendance Dataand Salary Charging Details.
29. Completes the sheet and wait for an approval.
30. **Training Schedule & Budget**
31. The ADMIN will be able to submit Training Requisition through using a link.
32. S/he can also set training schedule, participant list& budget by clicking on a link.
33. The actor can also send Training invitation letter through email to the selected candidate.
34. ADMIN actor will also submit training result sheet to the system
35. **User Management**
36. The ADMIN will be able to create a user under his/her provision.
37. S/he will be also able to assign the privilege to the employee under his/her provision.

***2.2.4 SUPER ADMIN Use Case***



**System Administration**

• **User Roles**: Built-in employee self-service and supervisor privileges. Administrators can create custom user roles with predefined privileges for specific purposes (e.g. Admin User, General User).

• **Password Policy and Security Authentication**: Password protocol (one number, one character, one special character and minimum length of the password is 6 character) should be implemented

• **Intruder Detection and Audit Trail**: Intruder detection and audit trail should be incorporated.

Must generate audit log file for each transaction or login.

**Brief Description of User Management:**

SUPER ADMIN will be able to use the following.

* HRIS Configuration
* HRIS Operation
* Full authentication to the HRIS Application
* Leave Management
* Training Management
* E-Recruitment Management
* Time Sheet Management
* PayrollConfiguration
* PayrollOperation
* Full authentication to the Payroll Application
* User Management.

**Initial Step-By-Step Description**

1. **HRIS Configuration**
2. SUPER ADMIN will able to configure all employment master information.
3. S/he will able to set employees HR information.
4. **Apply for leave**
5. The SUPER ADMIN chooses link apply for a leave.
6. The system displays the choices to select date and type of leave to apply.
7. The System also displays an admin section to apply for on behalf of any employee.
8. Completes application and wait for an approval
9. System will generate a mail to the supervisor request for leave approval.
10. Actor will also have a list of pending application of his/her own as well as any employee to edit before approval.
11. After approval/reject/modification system will generate a mail for both.
12. **View Leave Records**
13. The SUPER ADMIN chooses link to view his/her own as well as any employee leave records.
14. The system presents the abstract of his/her as well as any employee under leave status.
15. **Leave Approval**
16. The SUPER ADMIN chooses link to approve any employee leave application.
17. The actor will able to view the application before approve.
18. Actor can either approve a leave or regret it or can cancel it.
19. After the approval a mail will be generated to the applicant and supervisor notifying about the leave approval.
20. **Training Management**
21. The SUPER ADMIN will be able to submit Training Requisition through using a link.
22. S/he can also set training schedule, participant list& budget by clicking on a link.
23. The actor can also send Training invitation letter through email to the selected candidate with venue & other details.
24. SUPER ADMIN actor will also submit training evaluation process as well as result sheet to the system.
25. **E-recruitment Management:** The SUPER ADMIN chooses different link in e-requirement web application to manage below steps:
26. Job Posting through e-recruitment system.
27. Job wise board member setup.
28. CV short listing.
29. Pre interview note generation.
30. Selection finalization.
31. Email notification to the candidates for interview.
32. Participant’s attendance list preparation.
33. Interview rating sheet generation.
34. Post interview note generation.
35. Email notification to the successful candidate(s) as well as unsuccessful candidates.
36. Reference Checking.
37. Appointment letter generation.
38. **Time Sheet Correction**
39. The SUPER ADMIN chooses link to manage Time sheet for each month with OT (if applicable).
40. Time Sheet Policy has to set.
41. Staff Attendance information integrates with device system.
42. Attendance Log info for all employees.
43. Time Sheet Process integrates with device system and Salary Charging Details.
44. Completes the sheet and wait for an approval.
45. **Payroll Management**
46. SUPER ADMIN will be able inputpayroll configuration information.
47. S/hewill also set any organization policy or change any exiting policy.
48. Do attendance clearance at every month by mentioning every staffs present, absent, leave and LWOP information.
49. Prepare payroll process.
50. Do the necessary changes.
51. Payroll reviewed & approved by respective supervisor.
52. Submit PF loan, Gratuity, IT, Increment, Bonus & other payroll related issues.
53. Submit the changes to incorporate with the software.
54. **User Management**
55. The SUPER ADMIN will be able to create a user.
56. S/he will be also able to assign the privilege to the employee.

## ***2.3 User Characteristics***

All the EMPLOYEE actors need not be computer literate, except those who directly want to view their own attendance/leave status as well as want to apply online for a leave.

The SUPERVISOR is expected to be Internet literate and to be able to use simple computer application.

The SUPER ADMIN and ADMIN user expected to be Internet literate and understand LAN (Local Area Network) concept and software parameters.

## ***2.4 Non-Functional Requirements***

The physical machine to be used will be determined by the MS in Bangladesh. The software developed here assumes the use of a tool such as IIS for connection between the Web pages and the database. The speed of the software user connection will depend on the hardware used rather than characteristics of this system.

The system will support multi-user functionality. So more user will not affect the system performance. It’s generally depends the server configuration. The better the server the better the service. As more user will share the same server resource at the same time.

HRIS and Payroll System will be developed using C#.Net. Java script will be used as scripting language, IIS application server as application server and Windows Server 2008/2012 as OS of the server and SQL Server as Database. MS in Bangladesh will ensure the existence of database server installed in the server machine. End User must have LAN connection to connect to the server to work with this application.

**3.0. Requirements Specification**

***3.1 External Interface Requirements***

There is no external interface required.

## ***3.2 Functional Requirements***

Along with the other existing features the following functional requirements has been found during the requirement study at MS in Bangladesh.

Below is the participant of the requirement study.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Resource From BASE** | | | **Resource From MSB** | | |
| **SL** | **Name** | **Designation** | **SL** | **Name** | **Designation** |
| **1** | Amit Biswas | Project Manager | **1** | Md. Abu Sufian Sarkar | Manager, HR |
| **2** | SulataSaha | Team Leader | **2** | Ali Asgor | Manager IT |
| **3** | Md. Shazadul Islam | Sr. Software Engg. | **3** | TanginaAhammed | Manager Training |
|  | | | **4** | Md. Tofail Hossain | Manager Finance |
| **5** | Mr. Boloram | Associate Manager Finance |
| **6** | Dr, Shompa | Associate Manager Training |
| **7** | Afrina Hasan | HR Officers |

**Functional Requirements:**

Following are the summary functional requirement from MS (as per ToR) which is elaborated in details under Functional Requirements Details section:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **SLNo.** | |  | | --- | | **Module** | | **Sub Module** | |  | | --- | | **Function Details** | |
| 1.1 | |  | | --- | | **MSB Page (for all staff)** | | |  | | --- | | A common page for all | | |  | | --- | | All policies from MSB | |
| 1.2 | |  | | --- | | HO staff presence status especially if someone away from his/her desk | |
| 1.3 | |  | | --- | | Intra office Memos | |
| 1.4 | |  | | --- | | MSB newsletter, training calendar | |
| 2.1 | |  | | --- | | **Employee Self Service (ESS) Portal** | | |  | | --- | | Employee info | | Self-information with duration in MSB |
| 2.2 | |  | | --- | | Modification of address, NTK | |
| 2.3 | |  | | --- | | Payslip | | |  | | --- | | Monthly Payslip | |
| 2.4 | Provident fund | |  | | --- | | Provident Fund information | |
| 2.5 | Tax Card | Income Tax info. |
| 2.6 | |  | | --- | | Leave Calendar | | |  | | --- | | Various Types of Leave. Ex. Casual, Earned, Sick etc along with Leave balance status | |
| 2.7 | |  | | --- | | Leave | | |  | | --- | | Leave Application Form. | |
| 2.8 | |  | | --- | | Attendance | | |  | | --- | | Monthly Attendance status | |
| 2.9 | |  | | --- | | Daily status i.e. Out of Station Duty, in meeting, Away from desk | |
| 2.10 | |  | | --- | | Outstanding advance amount status | |
| 2.11 |  | |  | | --- | | 360 degree report, yearly appraisal report | |
| 3.1 | |  | | --- | | **Attendance management** | | |  | | --- | | Attendance Process | | |  | | --- | | Online attendance for all locations | |
| 3.2 | |  | | --- | | Attendance process | |
| 3.3 | |  | | --- | | HO staff movement records, analysis & report | |
| 3.4 | |  | | --- | | Editing attendance by respective authority | |
| 3.5 | |  | | --- | | Monthly report generation | |
| 3.6 | |  | | --- | | Salary linked with attendance, deduction calculation | |
| 4.1 | |  | | --- | | **Leave management** | | |  | | --- | | Leave package | | |  | | --- | | Setting up leave calendar according to joining status with different types of leave | |
| 4.2 | |  | | --- | | Setting up for different locations | |
| 4.3 | |  | | --- | | Leave carry forward option | |
| 4.4 | |  | | --- | | Leave approval | | |  | | --- | | Confirmation of Leave application from respective authority. | |
| 4.5 | |  | | --- | | Linked with salary disbursement | |
| 4.6 | |  | | --- | | Leave analysis | | |  | | --- | | On types, profession, location wise | |
| 4.7 | |  | | --- | | Leave balance report for separation | |
| 5.1 | |  | | --- | | **HR Dashboard** | | |  | | --- | | A statistical current view | | of the organization | | |  | | --- | | Manpower project/location wise, male-female segmentation, technical & non | |
| 5.2 | |  | | --- | | technical segmentation, manpower trend month wise, regular & contractual | |
| 5.3 | |  | | --- | | wise, turnover rate, employee age range wise, recruitment status, separation status | |
| 5.4 | |  | | --- | | Leave analysis report | |
| 5.5 | Probation Period Expire |
| 6.1 | |  | | --- | | **e Recruitment** | | |  | | --- | | Employee application to | | on boarding | | |  | | --- | | On line application for all positions | |
| 6.2 | |  | | --- | | CV short listing | |
| 6.3 | |  | | --- | | CV bank creation | |
| 6.4 | |  | | --- | | Pre interview note generation | |  | |
| 6.5 | Email notification to the candidates for interview |
| 6.6 | |  | | --- | | Participants attendance list preparation | |
| 6.7 | |  | | --- | | Interview rating sheet generation | |
| 6.8 | |  | | --- | | selection finalization with waiting | |
| 6.9 | |  | | --- | | Post interview note generation | |
| 6.10 | |  | | --- | | Email notification to the successful candidate(s) as well as unsuccessful candidates | |
| 6.11 | Reference Checking: |
| 6.12 | |  | | --- | | Appointment letter generation | |
| 6.13 | |  | | --- | | Orientation communication with Line manager & candidates (HO level) | |
| 6.14 | |  | | --- | | Use of CV pool for future recruitment following procedures mentioned above | |
| 6.15 | |  | | --- | | Monthly recruitment analysis & report | |
| 7.1   |  | | --- | |  | | **HR Information** | Employee setup | |  | | --- | | Create/pull employee's personal information with photograph | |
| 7.2 | |  | | --- | | CV, Educational/professional certificates, NID/Passport, driving license uploading | |
| 7.3 | |  | | --- | | Technical staff's professional certification renewal notification | |
| 7.4 | |  | | --- | | Driving license renewal notification | |
| 7.5 | |  | | --- | | employment status, Bank account, cost centre setup | |
| 7.6 | |  | | --- | | Family/next to keen (NTK)/nominee/relatives in MSB information | |
| 7.7 | |  | | --- | | Joining at MSB | |
| 7.8 | |  | | --- | | Employment history | |
| 7.9 | Employee Education |
| 7.10 | Experience |
| 7.11 | Emergency Contract |
| 7.12 | References/Witness |
| 7.13 | Long Term Service Award |
| 7.14 | |  | | --- | | Employee life cycle | | Promotion / Increment |
| 7.15 | |  | | --- | | Disciplinary Actions | |
| 7.16 | |  | | --- | | Transfer | |
| 7.17 | |  | | --- | | Separation | |
| 7.18 | Additional Responsibility |
| 7.19 | Confirmation |
| 7.20 | Temporary Duty Assign |
| 7.21 | Contract Extension |
| 7.22 | Salary Amendment |
| 7.23 | Performance Appraisal |
| 7.24 | |  | | --- | | HR Reporting | | |  | | --- | | Customized detail Staff list | |
| 7.25 | |  | | --- | | Contract/Probationary list with expiration | |
| 7.26 | |  | | --- | | Demographic analysis & reporting | |
| 7.27 | |  | | --- | | Turnover analysis & reporting | |
| 7.28 | |  | | --- | | Periodic report generation options | |
| 7.29 | |  | | --- | | USAID compliance related reports | |
| 7.30 | |  | | --- | | Time sheet calculation & uploading from MS Excel | |
| 7.31 | |  | | --- | | **Reports mentioned on earlier tabs** | |
| 7.32 | |  | | --- | | **Tick box option on report generation** | |
| 8.1 | |  | | --- | | **Payroll** | | |  | | --- | | salary & benefits | | |  | | --- | | Salary break up | |
| 8.2 | |  | | --- | | Bonus packages | |
| 8.3 | |  | | --- | | LWOP setup | |
| 8.4 | |  | | --- | | Increment setup (auto/manual) | |
| 8.5 | |  | | --- | | Cost center setup/linking | |
| 8.6 | |  | | --- | | Banking setup | |
| 8.7 | |  | | --- | | Gratuity | | |  | | --- | | Monthly gratuity calculation & disbursement | |
| 8.8 | |  | | --- | | PF management | | |  | | --- | | Monthly PF calculation, deduction & disbursement | |
| 8.9 | |  | | --- | | Balance transfer to employee account against PF | |
| 8.10 | |  | | --- | | Yearly PF statement to all employee | |
| 8.11 | |  | | --- | | Arrear | | |  | | --- | | Any arrear calculation & disbursement | |
| 8.12 | |  | | --- | | Leave | | |  | | --- | | Leave adjustment on salary disbursement | |
| 8.13 | |  | | --- | | Time sheet | | |  | | --- | | Time sheet calculation & uploading from MS Excel | |
| 8.14 | |  | | --- | | Over Time | | |  | | --- | | OT calculation for salary disbursement | |
| 8.15 | |  | | --- | | Loan management | | |  | | --- | | Disbursement of loan, installment & settlement procedures. | |
| 8.16 | |  | | --- | | Increment | | |  | | --- | | Yearly increment calculation & disbursement | |
| 8.17 | |  | | --- | | Annual Performance Bonus | | |  | | --- | | Any APB calculation & disbursement | |
| 8.18 | |  | | --- | | COLA | | |  | | --- | | Yearly COLA adjustment | |
| 8.19 | |  | | --- | | Employee Separation | | |  | | --- | | Financial settlement after separation from MSB | |
| 8.20 | |  | | --- | | Income Tax (IT) | | |  | | --- | | Setting up Tax slabs | |
| 8.21 | |  | | --- | | IT information with source, deductions on monthly salary, adjustments | |
| 8.22 | |  | | --- | | IT report generation | |
| 8.23 | |  | | --- | | Payroll Reports | | |  | | --- | | Monthly Payslip / payment voucher | |
| 8.24 | |  | | --- | | Bank Advice letters | |
| 8.25 | |  | | --- | | Finance & Accounts related different reporting | |
| 9.1 | |  | | --- | | **Training & Development** | | |  | | --- | | Training category | | |  | | --- | | Training Matrix (Technical/non technical, home/abroad) setup | |
| 9.2 | Training Setup | Training Setup |
| 9.3 | |  | | --- | | Training calendar | | |  | | --- | | Training schedule set up | |
| 9.5 |  | |  | | --- | | Training budget generation | |
| 9.6 | |  | | --- | | Participants | | |  | | --- | | Sourcing internal candidates from HR database | |
| 9.7 | |  | | --- | | Training invitation letter sent to participants | |
| 9.8 | |  | | --- | | Training conduction as per Check List | |
| 9.9 | |  | | --- | | Training evaluation process | |
| 9.10 | |  | | --- | | Development | | |  | | --- | | TNA from Performance Appraisal | |
| 9.11 | |  | | --- | | Planned Work force development activities | |
| 9.11 | |  | | --- | | Reporting | | |  | | --- | | Report sharing to respective clinics, project offices, departments | |
| 9.12 | |  | | --- | | Training database to be linked with ESS & HR | |
| 9.13 | |  | | --- | | Periodic report generation options | |

***3.2.1 Functional Requirement Details:***

### 1 MSB Page (for all staff)

|  |  |  |
| --- | --- | --- |
| **1** | **MSB Page (For all Staff)** | |
|  | | |
| **1.1** |  | **Following policies from MSB:**  General Policy   * MSB Policy * Gender Policy * IT Policy * HR Policy * Procurement Policy * Other Policy * Different type of forms ( updated and developed against necessity) * BASE: Forms title and upload are dynamic in nature.   \*This policy info will be in PDF format within a folder & link will be provided to have the  facility to view this PDF file by all staff having valid User ID and Password.  Log will be preserved into database for last View by & View Date Time of each staff of MS.  Job Description: Preserve designation wise job description in PDF format in a folder & provide  the facility to display this PDF file for each staff with Last View by & View Date Time.  This access log will be preserve in db. |
| 1.2 |  | **HO Staff Presence Status:** An entry screen for HO staff presentence status especially if some away from his/her desk. Emp Id, Current date Time, Daily Status, Return Date Time need to preserve.  When staff back to his/her desk change status as available & store return date time. |
| 1.3 |  | **MSB News Letter:**MSB newsletter need to preserve with PDF format. Staff can open this letter with MSB policy. |
| 1.4 |  | **Training Calendar:**Manager will identify staff list those need training depending on staff’s necessity.  This data will be retrieve from training and development module to present as calendar and will be in read only mode. Any changes required has to be through training and development module. |

**2 Employee Self Service (ESS) portal**

|  |  |  |
| --- | --- | --- |
| **2** | **Employee Self Service (ESS) portal** | |
|  | | |
| **2.1** | **Employee Info** | **Self-information with duration in MSB:** Staff himself can enter their general information. Payroll & posting related information will be updated through HRIS screen and staff will have no access to update this records.  **TIN certificate upload:** Staff himself can upload their TIN certificate as reference attachment in General Information Screen.  **NID upload:** Staff can upload their NID in the ESS.  **Driving license:** Staff can upload their Driving license in the ESS with expiry notification in 2 months before. (where applicable)  **BMDC certificate:** Staff can upload their BMDC certificate in the ESS with expiry notification in 2 months before. (for all Doctors, Nurses & Paramedics passed from MATS) |
| **2.2** |  | **Modification of Address, NTK:** Staff himself can modify his address, next to keen (NTK), family, nominee, relatives and some other master information. |
|  |  | **Blood Group Search Facility:** there will be a separate search screen to populate the staff list based on Blood Group. Blood Group will be in Single Selection. |
|  | **Present address** | Employee can update present address as & when required |
|  | **Next to keen** | In case of emergency whom to be contacted his/her name, relationship, address & contact mobile number to be updated by staff. |
|  | **Nominee information** | Name of nominee(s), address, relationship, given % of share according to MSB format information to be available. HR will approve his/her application and can change anytime with prior approval from HR.(New Requirement) |
|  | **Joining** | Employee can join online and subsequent actions will be completed from approval to HR. Joining approval will ensure employee’s inclusion to the HRIS as an active employee.(Out of Scope S2:c) |
|  | **Resignation**  **(voluntary)** | Employee can resign voluntary giving full notice periodand subsequent actions will be completed from approval to HR.(reason for resign should have drop down option)  (applicant > CM/supervisor > HO line supervisor/GM >Manager/GM HR >CD) .(Out of Scope S2:d)   * A resignation approval letter to be sent to the applicant with required instructions. (New) * Charge hand over – take over, No Objection Certificate to be completed through proper channel and reach to HR. (New) |
|  | **Resignation withdrawn** | Applicants can withdraw their resignation application on or before completing the notice period. |
|  | **Exit interview** | An exit interview to be done through ESS to complete the separation process. (Out of Scope S7:a) |
| **2.3** | **Pay slip** | **Monthly Pay slip:** Staff will get access to view the monthly pay slip through ESS. Can store all pay slips month wise and get print our as and when required. |
| **2.4** | **Provident Fund** | **Provident Fund Information:** Staff will get a report with Employee Contribution & Company Contribution information.[Please see annex for the format] |
| **2.5** | **Tax Card** | **Income Tax Info:** Staff will get following report with his/her tax information:   * Tax Assessment. [Please see annex for the format] * Tax Calculation &[Please see annex for the format] * TaxCertificate. [Please see annex for the format] |
| **2.6** | **Leave Calendar** | Staff will get their leave detail report with various types of leave as assigned to his leave package along with balance. [Please see annex for the format] |
| **2.7** | **Leave** | **Leave Application Form:** Staff himself will apply leave from this screen. |
| **Leave Approval notification:** Supervisor/line manager/ department head will get supervisees/ co-colleague pending leave list for approval along with notification through email. He/she will have the facility to approve/regret leave from the list. |
| **2.8** | **Attendance** | **Monthly Attendance Status:** Staff will get their following attendance report:  Daily Attendance Status Report [Please see annex for the format]  Monthly Attendance Status Report [Please see annex for the format]  Away from desk history report (Out of Station Duty, in meeting, away from desk) [Please see annex for the format] |
| **2.9** | **Advance Taken** | **Outstanding Advance Amount Status:** Staff’s will get any outstanding advance amount against salary report. [Please see annex for the format] |
|  | **Asset information** | MSB provided asset i.e. laptop, motorcycle or any valuables EXP number with detail information to be uploaded to help/track during separation.(Out of Scope S5:a) |
| **2.10** | **Performance Appraisal** | For staff appraisal related records staff will get the following report on ESS:   * 360-degree report, [Please see annex for the format] * Yearly appraisal report [Please see annex for the format] * Appraisal Form A/KPI format shall be used for appraisal.(Out of Scope S7:b) * All appraisals shall be recorded year wise in each employee’s folder * HO line manager can send Performance Improvement or Appreciation letter from the template with necessary changes through this system. (New) |
| **2.11** | **Staff Movement** | Staffs field movement entry facility with date range & mail notification to supervisor |
|  | **Confirmation appraisal** | For all regular employees MSB Confirmation appraisal formats with subsequent actions to be taken.   * For technical positions Probation Period will be 3 months with extendable up to another 3 months. And for non-technical Probation Period will be 6 months. * Two sets of confirmation appraisal forms are using i.e. technical & non-technical. * Before completing the Probation Period a Confirmation Appraisal shall be done by appropriate personnel by last week of Probation Period for subsequent approval from management and reached to HR as well as update his/her status in the system accordingly. * Training need can be assessed and incorporated into the system. |
|  | **HR requisition** | MSB HR requisition form can be generated by Officer level at HO only with subsequent actions (Officer >HoD> GM HR > CD). Position specific information can be pulled from theinformation databank to fill the HRR. (Out of Scope S2:f) |
|  | **Staff transfer** | Staff transfer order at HO office level. This option can be initiated by Officer/Manager/GM/HoD.(New) |
|  |  |  |

**3 Attendance management**

|  |  |  |
| --- | --- | --- |
| **3** | **Attendance management** | |
|  |  |  |
| **3.1** | **Attendance Process** | **Online attendance from all locations:**  Field Office: Attendance data will be imported from predefined Excel File.  Head Office: Attendance data will be imported from Attendance Device File System. Only Single Type Device will be applicable from reading attendance data from file. |
| **3.2** |  | **Attendance process:**  There will be two type of process to handle attendance data. One process is automatic through BASE developed agent to import the data from attendance device file storage and another one will be Manual predefined excel file upload facility. The excel file format will be same for any offices under MSB.  Relevant reports can be produced using the attendance database. |
| **3.3** |  | **HO staff movement records, analysis & report:**  Staff movement will be entered through a screen and based on this entry attendance record will be modified with movement status. Report of this movement will be available.[Please see annex for the format]  This movement record will be available at ESS portal. |
| **3.4** | **Attendance Update** | **Editing attendance by respective authority:**  Attendance record can be adjusted manually for which adjustment log will be maintained. |
| **3.5** | **Attendance Report** | **Monthly report generation:**   * Daily Attendance Sheet * Monthly Attendance Sheet * Employee Wise Attendance Sheet * Summary Attendance Sheet * Absent/Late/Incomplete/Early Departure Report * Employee Wise Overtime Report * Department Wise Overtime Summary Report * Absenteeism related analytical reports(Report format required) |
| **3.6** | **Linked With Payroll** | **Salary linked with attendance, deduction calculation:**  Attendance Clearance feature will be provided to proceed with Payroll Preparation. In the clearance process data will be represented from Attendance Module including Present, Absent, Weekend, Holiday, etc. From here LWOP days for the selected month will be input considering which payroll will be prepared. |

***Requirement Specification Details:***

**Attendance Configuration:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Ref No.** | **Screen** | **Field** | **Type** | **Data Type** | **Policy** |
| **3.1** | **Holiday Setup** | | | | |
|  | Holiday Year | Drop Down | NUMBER |  |
| Holiday Title | Text Box | VARCHAR |  |
| Date From | Date | DATE |  |
| Date To | Date | DATE |  |
| Note | Text Box | VARCHAR |  |
| Make Inactive | Check Box | CHAR |  |
| IsFestival | Check Box | CHAR |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
|  | | | | | |
| 3.1 | **Weekend Setup** | | | | |
|  | Weekend Profile Name | Text Box | VARCHAR |  |
| Select Weekend Days | Check Box | VARCHAR |  |
| Make Inactive | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List |  |  |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
|  | | | | | |
| 3.1 | **Attendance Shift Setup** | | | | |
|  | Policy Title | Text Box | VARCHAR |  |
| Make Inactive | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| Over Time Start After | Text Box | NUMBER |  |
| Mark as General Shift | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| Description | Text Area | VARCHAR |  |
| Arrival Grace Time | Text Box | NUMBER |  |
| Lunch Break | Text Box | NUMBER |  |
| Arrival Time | Drop Down | NUMBER |  |
| Departure Time | Drop Down | NUMBER |  |
| Next Day | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| Lunch | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| Time | Drop Down | NUMBER |  |
| Working Time | Text Box | NUMBER |  |
| Policy List |  |  |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
| Close | Button |  |  |

**Attendance Operation:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **SL No.** | **Screen** | **Field** | **Type** | **Data Type** | **Policy** |
| **3.2** | **Time Sheet Generate** | | | | |
|  | Fiscal year | Dropdown | Numeric |  |
| Month | Dropdown | Numeric |  |
| Year | Dropdown | Numeric |  |
| Employee Type | Dropdown | Numeric |  |
| Employee ID | Dropdown | Numeric |  |
| Emp. Status | Radio button | Char(1) | Active, separated |
| Generate | Button |  | Generate timesheet and view on list |
| View | Grid view |  |  |
| Refresh | Button |  |  |
| SaveTimesheet | Button |  | Timesheet will Save for the month |
|  | | | | | |
| **3.2** | **Time Sheet Re-Generate** | | | | |
|  | Remarks Type | Dropdown | numeric |  |
| Remarks | Text area | VARCHAR |  |
| From Date | Date field | Date Time |  |
| To Date | Date Field | Date time |  |
| Refresh |  |  |  |
| Save |  |  |  |
| Delete |  |  |  |
|  | | | | | |
| **3.5** | **Time Sheet Report** | | | | |
|  | Employee ID | Dropdown | varchar |  |
| Emp. Status | Radio button | char |  |
| Month | Dropdown | numeric |  |
| Year | Dropdown | numeric |  |
| Print Preview | Button |  | Timesheet report will generate |
|  | | | | | |
| **3.2** | **Adjust Attendance** | | | | |
|  | Search By | Drop Down |  |  |
| Attendance From Date | Calendar | Date |  |
| Attendance To Date | Calendar | Date |  |
| Department | Drop Down | NUMBER |  |
| Location | Drop Down | NUMBER |  |
| Employee Type | Drop Down | NUMBER |  |
| Employee Status | Drop Down | NUMBER |  |
| Attendance Status | Drop Down | CHAR(1) |  |
| Retrieve | Button |  |  |
| In Time | Drop Down | NUMBER |  |
| Out Time | Drop Down | NUMBER |  |
| Next Day | Check Box | CHAR(1) |  |
| Set Shift | Drop Down | NUMBER |  |
| Remarks | Text Area | VARCHAR |  |
| Add | Button |  |  |
| Select All | Link |  |  |
| Clear All | Link |  |  |
| Adjust Attendance | Button |  |  |
| Refresh | Button |  |  |
|  | | | | | |
| **3.2** | **Attendance Excel File Importer** | | | | |
|  | Browse | Button |  |  |
| Upload Date | Button |  |  |
| Data From Excel File List | Grid View |  |  |
| Prepare Data for Merging | Button |  |  |
| Prepared Data for Merging List | Grid View |  |  |
| Merge Data | Button |  |  |

**4 Leave**

|  |  |  |
| --- | --- | --- |
| **4** | **Leave management** | |
|  | | |
| **4.1** | **Leave package** | **Setting up leave calendar according to joining status with different types of leave:**  System will have the facility to enter Leave Type information. The declared leave type is as follows:   |  |  | | --- | --- | | **Leave Type Title** | **Leave Type Code** | | Earned Leave | EL | | Sick Leave | SL | | Casual Leave | CL | | Maternity Leave | ML | | Paternity Leave | PL | | Bereavement Leave | BL | | Leave Without Pay | LWOP | | Compassionate Leave (visible and applicable only for HO staff) | CPL |   There will be Leave Package setup provision comprising the above mentioned leave with default balance for each leave year. Each and every employee of MSB will have a Leave Package selected under which he/she will be able to avail leave and get leave as of balance report. |
| **4.2** |  | **Setting up for different locations:**  Leave package can be setup as many as required. |
| **4.3** | **Leave Renew & Carry Forward** | **Leave carry forward option:**  The Leave type which is of carry forward nature must be set as carry forward from leave type setup. There will be a provision for Leave Renew feature which will carry forward the leave satisfying nature and associated terms & condition. Other leave will be renewed with default balance as declared in the leave package. Leave renew feature will be processed by selecting Leave Package. For each Leave Package renew has to be processed separately. |
| **4.4** | **Leave approval** | **Confirmation of Leave application from respective authority:**  Leave application can be submitted by employee at his own or by his/her supervisor or by the HR designated personnel. After the submission an email notification will be send to supervisor for approval.  Supervisor will login to the system and approve/regret/cancel the leave as required. For each of these action email notification will be disbursing to respective employee and cc list. |
| |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | **Approver** | | | **LWOP** | **BL** | **CL** | **SL** | **EL** | | CM/PM | | | 3 | 3 | 3 | 3 | 3 | | HO supervisor (Associate Manager) | Field | all staff |  | 3 | 3 | 4 - 7 | 4 - 7 | | CM/PO/PM |  | 3 | 3 | 3 | 3 | | HO staff | |  | 3 | 3 | 3 | 3 | | HO Manager | Field | all staff |  | 3 | 3 | 4 - 7 | 4 - 7 | | CM/PO/PM |  | 3 | 3 | 3 | 3 | | HO staff | |  | 3 | 3 | 3 | 3 | | GM | Field | all staff |  | 3 | 3 | 8 - 30 | 8 - 28 | | CM/PO/PM |  | 3 | 3 | 4 - 7 | 4 - 7 | | HO staff | |  | 3 | 3 | 4 - 7 | 4 - 7 | | S/Director | | |  | 3 | 3 | Up to 60 | Up to 28 | | S/DCS | | | 4 - 30 | 3 | 3 | Up to 60 | Up to 28 | | CMC/CD/MD | | | 31 - 120 | 3 | 3 | Up to 60 | Up to 28 | | BoD | | | > 120 |  |  |  |  | | | |
| **4.5** | **Linked with Payroll** | **Linked with salary disbursement:**  LWP will be counted during Attendance Clearance process where the authorized user will input the actual number of days for LWP to effect the salary. |
| **4.6** | **Leave analysis** | **On types, profession, location wise:**   1. Maternity leave availed. [Please see annex for the format] 2. Total leave enjoyed. [Please see annex for the format] 3. Project, Clinic, Location, Dept& month wise all leave types pie chart. [Please see annex for the format] 4. Productive Rate & absent rate.[Please see annex for the format] |
| **4.7** | **Leave balance** | Leave balance report for separation. [Please see annex for the format] |

***Requirement Specification Details:***

**Leave Configuration:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **SL No.** | **Screen** | **Field** | **Type** | **Data Type** | **Policy** |
| **4.1** | **Leave Type Setup** | | | | |
|  | Leave Title | Text Box | VARCHAR |  |
| Abbr. Name | Text Box | VARCHAR |  |
| Description | Text Box | VARCHAR |  |
| Leave Unit | Drop Down | NUMBER |  |
| At a Time Maximum | Text Box | NUMBER |  |
| Only Permanent Employee will get this Leave | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| Make Inactive | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| Leave Nature | Drop Down | NUMBER |  |
| Leave Type List |  |  | List of Leave Type |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
|  | | | | | |
| **4.1** | **Leave Package** | | | | |
|  | Package Title | Text Box | VARCHAR |  |
| Description | Text Box | VARCHAR |  |
| Make Inactive | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| Employee Type | Drop Down | NUMBER |  |
| Month From | Drop Down | NUMBER |  |
| Month To | Drop Down | NUMBER |  |
| Arrival Grace Time | Text Box | NUMBER |  |
| Lunch Break | Text Box | NUMBER |  |
| Arrival Time | Drop Down | NUMBER |  |
| Departure Time | Drop Down | NUMBER |  |
| Is Next Year | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| Leave Calculation is Applicable on Joining DATE | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| Weekend and Holiday Between leave Duration will be counted as Leave | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| Is Default | Check Box | CHAR(1) | DEFAULT ‘Y’ |

**Leave Operation:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **SL No.** | **Screen** | **Field** | **Type** | **Data Type** | **Policy** |
| **4.1** | **Leave Application** | | | | |
|  | **Tab-1** | | | |
| Employee Search | Search |  |  |
| Leave Balance List | Grid view |  |  |
| App. Date | Date Field | DateTime |  |
| From Date | Date Field | DateTime |  |
| To Date | Date Field | DateTime |  |
| Half Day | Dropdown | char |  |
| Resume Date | Date Field | DateTime |  |
| Leave type | Dropdown | numeric |  |
| Reason | Text area | Varchar |  |
| Leave Address | Text area | Varchar |  |
| Contact No |  | Varchar |  |
| Refresh | Button |  |  |
| Apply | Button |  |  |
| Show my leave History | Button |  |  |
| **Tab-2** | | | |
| Requested Leave List |  |  |  |
| **Tab-3** | | | |
| Approved leave List |  |  |  |
| Staff can enjoy their entitled CL & SL at probation/for the first six months’ time with MSB i.e. in every one month they will earn 1 CL & 1 SL and can avail only these in next month according to available balance.  After 6 months of joining both contractual & regular staff will get yearly entitled leaves onwards:  EL=Weekend & holyday will not count between leave start & end date. This leave can be accumulated up to 28 days  SL & CL=Weekend & holyday will count between leave start & end date  ML= Staff can enjoy this leave only upon submitting appropriate documents with approval from proper authority up to 120 days.   * Any applicant can avail this live with pay up to two live children in her life. * Any further ML will be availed as LWP or adjustable from SL/EL, if available. * During probation period or for the first six months staff will not be entitle for this leave and balance will be 0. After confirmation or completing the first six months balance can be input by authorized user. * For any miscarriage up to 27 weeks normal SL can be availed. Exceeding 27 weeks or 28 weeks or more weeks of miscarriage applicant can avail ML considering the criterion mentioned above.   Paternity Leave (PL): Male applicant can avail 3 days PL with pay for first two live children. For rest of the child’s birth other leave can be availed as appropriate. During probation or the first six month NO PL with pay is entitled.  Compassionate Leave (CPL): CP have to enjoy within 15 working days from his CP accrued date. This leave is for HO staff only.  Half Day Leave from CL/SL: Employees are entitled to take half (0.50) day leave from their accrued CL/SL with approval from Line manager. In a same leave date two leave application is not possible.   |  |  |  |  | | --- | --- | --- | --- | | **CAN** | | **CAN NOT** | | | CL | SL | CL | EL | | CL | BL |  |  | | CL | LWOP |  |  | | SL | EL | SL | CL | | SL | BL |  |  | | SL | LWOP |  |  | | EL | SL | EL | CL | | EL | LWOP |  |  | | EL | BL |  |  | | BL | EL | BL | CL | | BL | SL |  |  | | BL | LWOP |  |  | | ML/PL | SL | ML/PL | CL | | ML/PL | EL |  |  | | ML/PL | LWOP |  |  |   Leave Application: Staff will be able to apply 1 type of leave in a single application.  User Wise Authorization for Leave Application:  Supervisee : Can apply for his/her leave only.  Supervisor : Can apply for his/her leave as well any supervisee leave under his/her supervision.  Admin : Can apply any leave on behalf of staff. Admin user cannot apply for his/her own leave. In this case  he/she has to login using his staff credentials. | | | | | |
|  | | | | | |
| **4.4** | **Leave Approval** | | | | |
|  | Leave application List with **View,Approve,Result,Cancel**Actions | Data Grid View |  |  |
| Regretted Leave list with **View,Approve, Cancel**Actions | Data Grid View |  |  |
| Approved Leave List with **View, Cancel** action | Data Grid View |  |  |
| After leave application from Staff or Supervisor or HR Staff all leave application will be listed this leave approval form. An authorize user will approve the leave as per policy or he may regret or cancel the leave as required.  User wise authorization for Leave Approval:  Supervisor: Can approve for any leave for his/her supervisee  Admin: Can approve for any leave for any employee. | | | | | |
|  | | | | | |
| **4.6** | **Monthly Leave Accrual** | | | | |
|  | Employee Type | Dropdown | numeric |  |
| Leave Type | Dropdown | numeric |  |
| Week | Dropdown | numeric |  |
| Month | Dropdown | numeric |  |
| Year | Dropdown | numeric |  |
| Generate | Button |  |  |
| Save | Button |  |  |
| Refresh | Button |  |  |
| At probation period: After every 1 month’s completion staff will accrue  CL=1 day  SL=1 day  Note: CL=If staff joining with 10th of any month then he/she will get 1 day for that month. Otherwise he/she will not entitle for the joining month.  SL=If staff joining with 10th of any month then he/she will get 1 day for that month. Otherwise he/she will not entitle for the joining month.  Only probation period staff leave will be accrued through this feature. | | | | | |
|  | | | | | |
| **4.7** | **Leave Balance Entry** | | | | |
|  | Employee Search | Search option |  |  |
| Leave status list with **carryover, entitled , availed**text field to input balance | Text field | numeric |  |
|  | | | | | |
| **4.3** | **Leave Renew** | | | | |
|  | Leave Package | Dropdown List |  |  |
| Old Leave Period | Dropdown List |  |  |
| New Leave Period | Dropdown List |  |  |
| Start | Button |  |  |
|  | | | | | |
| **4.6** | **Employee On Leave** | | | | |
|  | Emp.ID | Text Box |  |  |
| Office | Dropdown List |  |  |
| Team | Dropdown list |  |  |
| From date | Date Field |  |  |
| To Date | Date Field |  |  |
| Print preview | Button |  |  |
|  | | | | | |
| **4.7** | **Leave Balance Report for separation** | | | | |
|  | Month | Dropdown | Numeric |  |
| Year | Dropdown | Numeric |  |
| Fiscal year | Dropdown | Numeric |  |
| Generate | Button |  |  |
| List View | Grid View |  |  |
| Save | Button |  |  |

**5 HR Dashboard**

|  |  |  |
| --- | --- | --- |
| 5 | **HR Dashboard** | |
|  |  | **Recruitment status:**   1. 6 months’ recruitment project wise 2. 6 months’ recruitment month wise 3. Year wise recruitment comparison 4. Methods used of vacancy announcement (Jan – Jun 2015) 5. Methods of receiving applications 6. Recruitment status 7. Gap analysis by position wise, project wise, location wise(Format required)   Screen Format: Designation||CV Create Date||Interview Date||Post Note Date ||Tentative Joining Date||Orientation Date||Sitting Arrangement Date|| Joining Mail Button (When this button is pressed then a new Window will open to write message with a template & Send button to send mail HR). |
| **5.1** | **A statistical current view**  **of the organization** | Report for Manpower project/location wise, male-female segmentation, technical & non-technical  **Manpower project/location wise**   1. TOTAL EMPLOYEE AS OF 30th June 2015 2. Project wise manpower distribution   **Male-female segmentation,**   1. Gender Portfolio   **Technical &Non-Technical**   1. HR proportion in Clinical Set Up (Technical/Non-Technical) 2. Technical &Non-Technical Portfolio 3. Gender Ratio in Technical & 4. Non-Technical Position 5. Technical positions project wise 6. Technical positions project, location, clinic category, designation wise 7. Project wise technical Human Resources |
| **5.2** |  | Report for technical segmentation, manpower trend month wise, regular & contractual:  **Technical segmentation:**   1. Clinical category portfolio   **Manpower trend month wise:**   1. HR Trend |
| **5.3** |  | Report for wise, turnover rate, employee age range wise, recruitment status, separation status:  **Turnover rate:**   1. Overall turnover percentile 2. Staff turnover trend 3. Overall turnover (Jan – June 2015) 4. Reasons for leaving 5. Technical position Left from Jan - June 2015   **Employee age range wise:**   1. Manpower according to age range   **Separation status: List of these staffs**   1. Reasons for leaving 2. What would have kept you at MSB? 3. Response sum up 4. Designation wise Separation Count   Designation||Termination||VoluntaryResign||Retrenchment||Retirement||Dismiss & other all separation type |
| **5.4** | **Leave analysis** | Report for Leave analysis report. (Same as section 4.6 of Leave Module) |
| **5.5** | **Probation Period Expire** | For technical positions Probation Period will be 3 months with extendable up to another 3 months. And for non-technical Probation Period will be 6 months. Before completing the Probation Period a Confirmation Appraisal shall be done by appropriate personnel by last week of Probation Period for subsequent approval from management and reached to HR as well as update his/her status in the system accordingly.(New)  Probation Period Expire List: Staff list whose probation period will expire within 15 days need to show on HR dashboard. This list will be grouped as 2 weeks/ 1 week and 1 day.  There will be a button to send mail to concern department head for each of the group.  1 day group list will appear in red mark. |

**6 e-Recruitment**

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| **6** | **e Recruitment** | |
|  | | |
| MSB HR requisition form at HO level can be generate from Officer level through ESS. | | |
| **6.1** | **Employee application to on boarding** | **Online application for all positions**   * Job Posting through e-recruitment system. * Job wise board member setup. * Board member Change Facility through a screen. * Applicant registration through job or without job and application submission. |
| **6.2** | **CV short listing:**  There will be four level of shortlisting as follows:   1. Step 1 2. Step 2 3. Step 3 4. Step 4   The shortlist parameter criteria will be as follows:   * Home District * Gender * Age Range * Religion * Marital Status * Blood Group * Name of Degree * Subject/Discipline/Major * Passing Year * Division/Class/CGPA/Grade * Total Year of Service * Salary Negotiable * Posting preference * Related Experience * Expected gross salary betweenAnd * Current salary betweenAnd * Are you currently employed or were employed by MSB? * Do you have any relative in MSB?   **System will generate a primary short listing considering MSB short-listing format.**   * After review by HR officer of this, the short-list 1 file shall be shared to the designated personnel as per pre-note for making final selection (YES/NO) for assessment with email notification. * During short-listing 1, any applicant who fail to pass MSB interview board in last six months shall be marked with special remarks whether s/he will be short listed or not. The personnel will make the final list and sign off with approval from HoD and share to the HR Officer accordingly.(New) * From the final short list HR Officer will generate the short-list 2 for making attendance containing candidates name, contact number, and emailID, as prescribed by MSB. * Rating sheet, as per MSB guideline, shall be generated at the same time. * Position wise **question bank** can be stored and use anytime.(New) |
| **6.3** | **CV bank creation:**  Applicant registration data will be stored permanently into e-recruitment database as a reference of CV bank. This CV bank can be useable anytime for process any recruitment requirement. |
| **6.4** | **Pre interview note generation:**  HR will generate pre-note and send to concern department head. He/she will decide person and interview board member. This note will carry information from the HR requisition date to till activities dates as developed by MSB.  This functionality will redirect to Board Member setup screen of the system where the authorized user will select the Job Wise Interview Board Member. |
| **6.5** | **selection finalization with waiting:**  Final shortlisted candidate for a particular job will be stored in the system and there will be provision for waiting list from the final shortlisted list. |
| **6.6** | **Email notification to the candidates for interview:**  After final shortlisting the selected candidate will be notified for the interview session through email. There will be a templated email with edit option. |
| **6.7** | **Participants attendance list preparation:**  Final Selected Applicant for a particular job can be listed and printed for interview attendance record keeping. |
| **6.8** | **Interview rating sheet generation:(different types of formats)**  Each of the board member will be able to input rating on particular job that he/she has been assigned.  The rating field and associated marks will be as follows:   |  |  | | --- | --- | | **Field** | **Marks** | | Personality/fitness | 20 | | Experience | 10 | | Qualification | 20 | | Job Knowledge | 20 | | Behavior & attitude | 10 | | Communication | 20 | | **Viva Total** | **100** |   There will be comments field for each Board Member.  Final accumulated sheet can be generated and get print from the system.  **For analysis purpose: (6.8)**   * Interview taking time against each sessions (start time & finish time).   Number of actual participants against the call for interview and number of selected candidates to measure the interview success rate. (New) |
| **6.9** | **Post interview note generation:**  HR Officer generate post note and send to GM HR then Recruitment committee for finally selected candidate for the said position.  The post note includes name, location, job status, salary & benefits, remarks.  This note will carry information from the HR requisition date to till activities dates as developed by MSB which will help us to calculate the recruitment time and subsequent analysis.  This post interview note can be edited by authorize user to amend remarks/comment after generation. |
| **6.10** | Email notification to the successful candidate(s) as well as unsuccessful candidates. |
| **6.11** | **Reference Checking:**  Finally selected candidate(s) reference will be checked by the HR Officer and relative data will be posted accordingly in to the system, especially the Reference Checking Form and endorsed with duly electronic signatures.  BASE: Signature image upload  The reference checklist will be stored into the system as form which data will be entered. |
| **6.12** | **Appointment letter generation:**  HR respective user will pull the data from e-recruitment system to HRIS system and then will be able to generate appointment letter while entering his other required information into the system.  A temporary employee page will create on candidates’ name and this will be active after joining the person into the system and after completion of subsequent actions will ensure the new employee as MSB’s staff. ??? |
| **6.13** | **Orientation communication with Line manager & candidates (HO level):**  **From the HRIS:**   * An orientation/induction schedule as per MSB structure& PC request to be sent to the HoD/GM * sitting arrangements& PABX request to Admin Manager/Officer * stationary items request to Admin Officer – store |
| **6.14** | **Use of CV pool for future recruitment following procedures mentioned above:**  There will be facility to retrieve CV from the CV Bank for future reference. |
| **6.15** | Monthly recruitment analysis & report[Please see annex for the format] |
| **6.16** |  | **CV screening locking system:**  **For internal candidate:**   * Any terminated staff from MSB cannot be eligible for shortlisting. * Candidate can apply maximum up to 2 positions higher than present position. * **Advanced level (Future plan):** after setting required competencies in specific position applicant’s present competencies shall be considered. * After completion of continuous one year service period with MSB. * If unsuccessful in any interview in MSB within last six months’ time.  **For external candidate(New)**   If unsuccessful in any interview in MSB within last six months’ time.  **A summary of locking both applicants list shall be reviewed by HR Manager/GM to consider and they can allow for primary short listing.  A remarks information shall be incorporated so that final decision can be taken by the designated personnel at HO.** |

***Requirement Specification Details:***

**Applicant Module:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Screen** | **Field** | **Type** | **Data Type** | **Policy** |
| **Personal** | | | | |
| 6.1 | Full Name | Text Box | VARCHAR | As Per SSC/Equivalent |
| Password | Text Box | Password | At least 6 digits |
| Mother’s Name | Text Box | VARCHAR |  |
| Father’s Name | Text Box | VARCHAR |  |
| Present Address | Text Area | VARCHAR |  |
| Permanent Address | Text Area | VARCHAR |  |
| Home District | Drop Down | NUMBER |  |
| DATE of Birth | Calendar | DATE | Age at least 18 years |
| Email | Text Box | VARCHAR | This will be user ID |
| Contact Number | Text Box | NUMBER |  |
| Emergency Contact Number | Text Box | NUMBER | Contact and emergency must be different |
| Gender | Drop Down | NUMBER |  |
| National ID | Text Box | NUMBER |  |
| Religion | Drop Down | NUMBER |  |
| Nationality | Text Box | VARCHAR |  |
| Marital Status | Drop Down | NUMBER |  |
| Name of Spouse | Text Box | VARCHAR |  |
| No. Of Children | Text Box | NUMBER |  |
| Blood Group | Drop Down | NUMBER |  |
| Passport | Text Box | VARCHAR |  |
| Next | Button |  | Next page with save data |
| **Education/Employment** | | | | |
| 6.1 | Add Education | Button |  |  |
| Add Employment | Button |  |  |
| Next | Button |  |  |
| Back | Button |  |  |
| **Education/Employment : Add New Education Level** | | | | |
| 6.1 | Name of Degree | Drop Down | VARCHAR |  |
| Educational Institute | Drop Down | VARCHAR |  |
| Division/Class/CGPA/Grade | Text Box | VARCHAR |  |
| Passing Year | Drop Down | VARCHAR |  |
| Subject/Discipline/Major | Drop Down | VARCHAR |  |
| Specialization | Text Box | VARCHAR |  |
| Others | Text Box | VARCHAR |  |
| Save | Button |  |  |
| Close | Button |  |  |
| **Education/Employment : Add New Employment** | | | | |
| 6.1 | Name of Organization | Text Box | VARCHAR |  |
| Type of Organization | Drop Down | VARCHAR |  |
| Address of Organization | Text Area | VARCHAR |  |
| Designation | Text Box | VARCHAR |  |
| Date From | Drop Down | NUMBER |  |
| Still Working | Check Box | CHAR(1) |  |
| Date To | Drop Down | NUMBER |  |
| Reason for Leaving | Text Box | VARCHAR |  |
| Major Responsibilities and Duties | Text Area | VARCHAR | MAX 2000 CHAR |
| Supervisor's Name | Text Box | VARCHAR |  |
| Supervisor's Designation | Text Box | VARCHAR |  |
| Supervisor's Contact No. | Text Box | VARCHAR |  |
| Supervisor's Email | Text Box | VARCHAR |  |
| Last Pay | Text Box | VARCHAR |  |
| Total Year of Services | Text Box | VARCHAR | Auto calculated |
| Save | Button |  |  |
| Close | Button |  |  |
| **Professional Degree/Training** | | | | |
| 6.1 | Add Professional Degree | Button |  |  |
| Add Training | Button |  |  |
| Next | Button |  |  |
| Back | Button |  |  |
| **Professional Degree/Training: Add New Professional Degree** | | | | |
| 6.1 | Name of Degree | Text Box | VARCHAR |  |
| Subject/Discipline/Major | Text Box | VARCHAR |  |
| Institute Name | Text Area | VARCHAR |  |
| Class/CGPA/Grade | Text Box | VARCHAR |  |
| Passing Year | Drop Down | VARCHAR |  |
| Specialization | Text Box | VARCHAR |  |
| Others | Text Box | VARCHAR |  |
| Save | Button |  |  |
| Close | Button |  |  |
| **Professional Degree/Training: Add New Professional Degree** | | | | |
| 6.1 | Training Name | Text Box | VARCHAR |  |
| Institute/Organization | Text Box | VARCHAR |  |
| Duration | Text Box | VARCHAR |  |
| Place of Training | Text Box | VARCHAR |  |
| Save | Button |  |  |
| Close | Button |  |  |
| **Others: Add New Language Proficiency** | | | | |
| 6.1 | Language Name | Text Box | VARCHAR |  |
| Reading Proficiency | Radio Button |  |  |
| Writing Proficiency | Radio Button |  |  |
| Speaking Proficiency | Radio Button |  |  |
| Save | Button |  |  |
| Close | Button |  |  |
| **Others: Additional Information** | | | | |
| 6.1 | Current Salary (Gross) | Text Box | NUMBER |  |
| Expected Salary (Gross) | Text Box | NUMBER |  |
| Is Salary | Radio Button |  |  |
| Time Require to Join | Text Box | VARCHAR |  |
| Driving License No. | Text Box | VARCHAR |  |
| Expected Posting Preference | Multiple Selection |  | Max 3 Selection |
| Save | Button |  |  |
| **Others: How did you know about this job posting?** | | | | |
| 6.1 | Source | Drop Down | VARCHAR |  |
| Save | Button |  |  |
| **Others: Are you currently employed or were employed by MSB?** | | | | |
| 6.1 | Are you currently employed or were employed by MSB? | Radio Button |  |  |
| Employee Number | Text Box | VARCHAR |  |
| Joining Date | Calendar | Date |  |
| Still Working | Check Box | CHAR(1) |  |
| Separation Date | Calendar | Date |  |
| Last Place of Posting | Text Box | VARCHAR |  |
| Project/Unit/Dept. | Text Box | VARCHAR |  |
| Save | Button |  |  |
| **Others: Do you have any relative in MSB?** | | | | |
| 6.1 | Do you have any relative in MSB? | Radio Button |  |  |
| Name of Relative | Text Box | VARCHAR |  |
| Designation | Text Box | VARCHAR |  |
| Employee No. | Text Box | VARCHAR |  |
| Project/Unit/Dept. | Text Box | VARCHAR |  |
| Relationship | Text Box | VARCHAR |  |
| Save | Button |  |  |
| **Others: Others Exposure** | | | | |
| 6.1 | Disaster Response | Text Area | VARCHAR |  |
| Public Health | Text Area | VARCHAR |  |
| Women Empowerment | Text Area | VARCHAR |  |
| Food Security | Text Area | VARCHAR |  |
| Any Other | Text Area | VARCHAR |  |
| Save | Button |  |  |
| **Others: Photograph and CV** | | | | |
| 6.1 | Browse (Photograph) | Button |  |  |
| Upload (Photograph) | Button |  |  |
| Browse (CV) | Button |  |  |
| Upload (CV) | Button |  |  |
| Browse (Cover Letter) | Button |  |  |
| Upload (Cover Letter) | Button |  |  |
| Policy | CV bank creation: All CV save into system. | | | |
| **Others: References: Add New Reference** | | | | |
| 6.1 | Name | Text Box | VARCHAR |  |
| Designation | Text Box | VARCHAR |  |
| Organization | Text Box | VARCHAR |  |
| Email | Text Box | VARCHAR |  |
| Contact Number | Text Box | VARCHAR |  |
| Address | Text Area | VARCHAR |  |
| Save | Button |  |  |
| Close | Button |  |  |
| Back | Button |  |  |
| I agree | Check Box | CHAR(1) |  |
| Submit | Button |  |  |
| **Login** | | | | |
| 6.1 | Username(Your mail address) | Text Box | VARCHAR |  |
| Password | Text Box | Password |  |
| Login | Button |  |  |
| Register | Link |  |  |
| Forget Password | Link |  |  |
| **Forget Password** | | | | |
| 6.1 | Email | Text Box | VARCHAR |  |
| Submit | Button |  |  |

**Admin Module:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Screen** | **Field** | **Type** | **Date Type** | **Policy** |
| **Jobs List** | | | | |
| 6.1 | Title | Text Box | VARCHAR |  |
| Deadline | Calendar | Date |  |
| Search | Button |  |  |
| View | Button |  |  |
| Edit | Button |  |  |
| Delete | Button |  |  |
| **Jobs Setup** | | | | |
| 6.1 | Project|Dept.|Unit | Text Box | VARCHAR |  |
| Job Title | Text Box | VARCHAR |  |
| Job Deadline | Calendar | Date |  |
| No. of Vacancy | Text Box | VARCHAR |  |
| Highest Qualification | Text Box | VARCHAR |  |
| Approved | Check Box | CHAR(1) |  |
| Job Details | Editor | VARCHAR |  |
| Add | Button |  |  |
| **Users** | | | | |
|  | Set Permissions | Text Box | VARCHAR |  |
| View | Button |  |  |
| Edit | Button |  |  |
| Delete | Button |  |  |
| User Name | Text Box | VARCHAR |  |
| Full Name | Text Box | VARCHAR |  |
| Password | Text Box | VARCHAR |  |
| Retype Password | Text Box | VARCHAR |  |
| Email Address | Text Box | VARCHAR |  |
| Designation | Text Box | VARCHAR |  |
| Department | Text Box | VARCHAR |  |
| Phone | Text Box | VARCHAR |  |
| Ext. | Button |  |  |
| Is Admin | Check Box | CHAR(1) |  |
| Make Inactive | Check Box | CHAR(1) |  |
| Submit | Button |  |  |
| Policy | User can view all own history.  One text field before submission the CV ” Why you fit for the position ” (only for project office and head office) | | | |
| **Users: Set Permission** | | | | |
|  | **User Permission Setup List** | Check Box | VARCHAR |  |
| Change | Button |  |  |
| Back To User List | Button |  |  |
| **Short Listing : Steps Short Listing** | | | | |
| **6.2** | **Select Job** | Drop Down | VARCHAR |  |
| Step 1 | Button |  |  |
| Step 2 | Button |  |  |
| Step 3 | Button |  |  |
| Step 4 | Button |  |  |
| Policy | System will generate shortlist with matching percentage some special data field for various circular.(Institutes ,Experience ,Course duration etc) | | | |
| **Short Listing : Cancel Short Listing** | | | | |
| **6.2** | **Job** | Drop Down | VARCHAR |  |
| View Result | Button |  |  |
| **Short Listing : Initial Short Listing by HR** | | | | |
| **6.2** | Home District | Drop Down | VARCHAR |  |
| Gender | Drop Down | VARCHAR |  |
| **Age Range** | Drop Down | VARCHAR |  |
| Religion | Drop Down | VARCHAR |  |
| Marital Status | Drop Down | VARCHAR |  |
| Blood Group | Drop Down | VARCHAR |  |
| No. of Children | Text Box | VARCHAR |  |
| **Name of Degree** | Multiple Selection |  |  |
| **Subject/Discipline/Major** | Multiple Selection |  |  |
| Passing Year | Drop Down | VARCHAR |  |
| **Division/Class/CGPA/Grade** | Text Box | VARCHAR |  |
| Total year of Service | Text Box | VARCHAR |  |
| **Salary Negotiable** | Radio |  |  |
| **Posting preference** | Radio |  |  |
| **Related Experience** | Text Box | VARCHAR |  |
| Expected gross salary between | Text Box | VARCHAR |  |
| **And** | Text Box | VARCHAR |  |
| Current salary between | Text Box | VARCHAR |  |
| And | Text Box | VARCHAR |  |
| Are you currently employed or were employed by CARE? | Radio |  |  |
| **Do you have any relative in MSB?** | Radio |  |  |
| Name of Degree | Text Box | VARCHAR |  |
| Subject/Discipline/Major | Text Box | VARCHAR |  |
| **Class/CGPA/Grade** | Text Box | VARCHAR |  |
| **Submit** | Button |  |  |
| **Short Listing : Initial Short Listing by HR** | | | | |
| **6.2** | **Select All** | Check Box |  |  |
| **Export Result into Excel** | Button |  |  |
| **Select Applicants** | Button |  |  |
| **Back To Shortlisting Steps** | Button |  |  |
| **Short Listing : Initial Short Listing by HR** | | | | |
| **6.2** | **Select All** | Button |  |  |
| **Export Result into Excel** | Button |  |  |
| **Select Applicants** | Button |  |  |
| **Back To Shortlisting Steps** | Button |  |  |
| **Short Listing : Short Listing By Haring Manager** | | | | |
| **6.2** | **Select All** | Button |  |  |
| **Export Result into Excel** | Button |  |  |
| **Select Applicants** | Button |  |  |
| **Back To Shortlisting Steps** | Button |  |  |
| **Short Listing : Short Listing after HIRS Checking** | | | | |
| **6.2** | **Select All** | Button |  |  |
| **Export Result into Excel** | Button |  |  |
| **Select Applicants** | Button |  |  |
| **Back To Shortlisting Steps** | Button |  |  |
| **Short Listing : Final Short Listing** | | | | |
| **6.2** | **Select All** | Button |  |  |
| **Export Result into Excel** | Button |  |  |
| **Select Applicants** | Button |  |  |
| **Back To Shortlisting Steps** | Button |  |  |
| **Interview Invitation** | | | | |
| **6.2** | File Attachment | Button |  |  |
| View | Button |  |  |
| Edit | Button |  |  |
| Delete | Button |  |  |
| **Interview Invitation: Create New Invitation Letter** | | | | |
| 6.2 | Job | Drop Down | VARCHAR |  |
| Dept|Program|Unit | Text Box |  |  |
| Letter Issue Date | Calendar | Date |  |
| Date of Interview(with time) | Calendar | DateTime |  |
| Interview Type | Check Box | VARCHAR |  |
| Place of Interview | Text Area | VARCHAR |  |
| Add | Button |  |  |
| **Pre interview note generation** | | | | |
| 6.4 | HR will generate pre-note and send to concern department head. He/she will decide person and interview board member.   * To (Location) * From(Emp Id) * Subject * Pre Note Initiation Date * Interview Venue * Board Member List * Approve By(3 EmpId) | | | |
| **Interview Invitation: Invitation Letter Attachment** | | | | |
| 6.5 | Job Name | Drop Down | VARCHAR |  |
| File Upload | Button |  |  |
| Add | Button |  |  |
| **Final Selection: Create New Regret Letter** | | | | |
| 6.8 | Job | Drop Down | VARCHAR |  |
| Dept|Program|Unit | Text Box | VARCHAR |  |
| Letter Issue Date | Calendar | Date |  |
| **Add** | Button |  |  |
| **Settings: Parameter Settings** | | | | |
|  | Degree Name | Text Box | VARCHAR |  |
| Add | Button |  |  |
| Edit | Button |  |  |
| **Delete** | Button |  |  |
| Institute Type | Drop Down | VARCHAR |  |
| Institute Name | Text Box | VARCHAR |  |
| Add | Button |  |  |
| Edit | Button |  |  |
| Subject Name | Text Box | VARCHAR |  |
| Add | Button |  |  |
| Edit | Button |  |  |
| Delete | Button |  |  |
| Religion Name | Text Box | VARCHAR |  |
| Add | Button |  |  |
| Edit | Button |  |  |
| Delete | Button |  |  |
| **Settings: CV Clean Up** | | | | |
|  | Select According to | Drop Down | VARCHAR |  |
| Date From | Calendar | Date |  |
| Date To | Calendar | Date |  |
| **View Result** | Button |  |  |
| **Settings: Create Database Backup** | | | | |
|  | Get Backup | Button |  |  |
|  |  |  |  |
| **Settings: Change Password** | | | | |
|  | User ID | Text Box | VARCHAR |  |
| Email Address | Calendar | Date |  |
| Current Password | Password | VARCHAR |  |
| New Password | Password | VARCHAR |  |
| Confirm Password | Password | VARCHAR |  |
| Change Password | Button |  |  |
| **Reports: Job Status Report** | | | | |
|  | Date From | Calendar | Date |  |
| Date To | Calendar | Date |  |
| Select Jobs | Drop Down | VARCHAR |  |
| View Report | Button |  |  |
| **Reports: Short Listing Report** | | | | |
|  | Select Job | Drop Down | VARCHAR |  |
| Short Listing Step | Drop Down | VARCHAR |  |
| View Report | Button |  |  |
| **Reports: Letter Send Report** | | | | |
|  | Select Job | Drop Down | VARCHAR |  |
| Type | Drop Down | VARCHAR |  |
| View Report | Button |  |  |

**7 HR Information**

|  |  |  |
| --- | --- | --- |
| **7** | **HR Information** | |
|  |  |  |
| **7.1** | **Employee setup** | **Create/pull employee's personal information with photograph:**  There will be two type of employee's personal information.   1. General Information 2. HR Information.   For each the information there will be separate screen/form.  employee's personal information can be entered or imported from e-recruitment system. For importing the relevant data only will be automatically pulled from e-Recruitment database while other data for each of the form need to be manually entered from respective user.  The import functionality will be operated on single employee base while his record will be pulled form e-recruitment system depending on a unique ID.  **The final employee database format shall be as per MSB.** |
| **7.2** | **CV, Educational/professional certificates, NID/Passport, driving license uploading:**  Staff can upload his/her below listed files which will be stored to a specific folder through ESS.  • CV  • Educational all Certificates Scan Copy  • Experience certificate Copy  • National ID Copy  • TIN Certificate Copy  • Passport Copy  • Professional Certificate Copy  • Driving Licenses Copy  • BMDC Certificate  • Reference Form  • Nominee Photos (more than 1)  This data will also be viewable in employee General Information as a link clicking which file will be displayed. |
| **7.3** | **Technical staff's professional certification renewal notification:**  Staff will get professional certification renewal notification through email. There will be a button to disseminate the notification in HR Dashboard. |
| **7.4** | **Driving license renewal notification:**  Staff will get license renewal notification through email. There will be a button to disseminate the notification in HR Dashboard. |
| **7.5** | **employment status, Bank account, cost center setup:**  This will be maintained in configuration setup screens. |
| **7.6** | **Family/next to keen (NTK)/nominee/relatives in MSB information:**  There will be provision to enter Family/next to keen (NTK)/nominee/relatives information by employee own using ESS. |
| **7.7** | **Joining at MSB:**  Employee will get an Join Button in ESS clicking which will ensure the staff as a payroll staff. |
| **7.8** | **Employment history:**  The HR Information screen will have a list as Employment history which will display a list of all HR actions posted for the employee. |
| **7.9** | **Employee Education** | Employee Educational information entry facility. |
| **7.10** | **Experience** | Employee previous experience information entry facility. |
| **7.11** | **Emergency Contract** | Employee Emergency contact information entry facility. |
| **7.12** | **References/Witness** | Employee References/Witness contact information entry facility. |
| 7.13 | Long Term Service Award | After completion of 10 yr. service length than staff will get long service award.  Exception:   * If 1 or 2 month service stop for transfer from one project to another this stop month can be consider as his continuing service length. * When Contractual/Temporary employee switches between one project to another project then s/he will resign from current position to join in new project&position, in such cases their service continuation will be maintained. * But any service break up/discontinuation (i.e. last working day on Thursday and new joining on Saturday) shall not be considered directly and such cases especial consideration from management may be acceptable.(New) |
| **7.14** | **Employee life cycle**  **(HR Actions)** | **Promotion/Increment:**  There will be an facility to post promotion and increment data.   * Auto generated Promotion & Increment letter facilities shall be available. |
|  | **Confirmation:**   * Regular staff will be appraised before completing the probation period. * Information stated in ESS shall be considered as well as * Confirmation analysis report can be used for HR.(New) |
| **7.15** | **Disciplinary Actions:**  There will be an facility to post Disciplinary Actions data.   * Relevant documents i.e. ToR, different letters, report shall be generated &stored for record. * Summary of the investigation shall be noted in a special remarks box. * Analysis of disciplinary actions shall be available. (New) |
| **7.16** | **Transfer**  There will be a facility to post Transfer data.   * + Only HO staff can generate Transfer from their ESS. **A MSB formatted message** with required information i.e. name, employee no, position, present location, new location, WEF, Transfer allowance, remarks.   + Transfer allowance (TA) applicable or not will be decided during data posting. (Y/N). No TA will be applicable if transfer happens within the same district.   + TA can be availed after joining to thenew locations upon submission of application along with required valid documents.   + Staff can be transferred from one project to another project or transfer from within the same project but other location or core to other project & location.   + All financial balance related data will be transferred to the new project. This project will be any of two as MSB or MSCS. Necessary changes can be done accordingly at HR point into the system.   + GM level will post transfer Data. After transfer a PDF letter will be notified to HR with present and pervious location and effective date.   + Provision to incorporate some sort of instruction like CHT, new joining place, reporting person, notify finance, and transfer allowance during transfer data posting.   + **Approval:** Officer/Manager > GM/HoD>Manager/GM HR > DCS/CD   + After final approval e-mail notifications to be sent to the respective personnel > CM/PM both locations > GM/HoD> personal folder.   + Only after the approval the transfer data will be effective and necessary changes will be done at HR point in the system.   + Upon application from employee transfer order can be held up/delayed/cancelled. To complete the task required options shall be available at HR point in the system.(New)   + An analysis of transfer can be helpful for HR reporting/dashboard purpose.(New) |
| **7.17** | **Separation**  There will be a facility to post Separationdata.  **Except Resignation all separation’s template letters shall be uploaded into the system(New)**  Separation Type:  • **Resignation:** if employee resigns through ESS subsequent actions shall be taken to complete the process at HR point. Resignation withdraw application option shall be available at applicant’s end too, if it happens subsequent actions shall be taken to complete the process at HR point i.e. applicant > CM/supervisor>HO line supervisor/GM/HoD> Manager HR/GM HR > DCS/CD. After approval from CD an acceptance letter shall be issued to the applicant with cc to CM/PM > GM/HoD.  • **Retrenchment:** Project close before completed the project period, a letter to be sent to the employee(s) as per MSB policy.  • **Discharge:** A letter to be sent to the employee on this ground.  • **Retirement:**before reaching at 60 years, a letter shall be sent to the employee two months prior the retirement age notifying the incident. At the retirement time final letter shall be sent as per MSB policy.(New)  • **Termination:**A letter to be sent to the employee on this ground. At the time of termination staff will get advance salary from termination date to next 30 days. This advance salary will be posted through Final Settlement Screen.  • **Dismiss:** A letter to be sent to the employee on this ground. Staff will get PF contribution from **both part** along with other benefits as entitled. This PF contribution amount will be posted from Final Settlement Screen.   * EL Balance= (Total Entitlement/Total Month)\*Current Month + Existing EL balance. EL Encashment up to 28 daysbalances to the staff during final settlement as per MSB policy. |
| **7.18** | **Additional Responsibility:**  There will be a facility to post additional responsibility data within a date range. |
| **7.19** | **Confirmation:**  After completion probation period staff will be considered as permanent while his confirmation data is posted through this from.  Staff leave will be updated as follows:  CL=Pro rata calculation for remaining month till December + Probation times CL balance  SL=Pro rata calculation for remaining month till December + Probation times SL balance  EL= (Total Entitlement/Total Month) \*2 [Note: If entitlement is fractional value than ceiling up to .5 and round above .5] |
| **7.20** | **Temporary Duty Assign:**  There will be a facility to post temporary duty assign data within a date range. |
| **7.21** | **Contract Extension:**  If staff is contractual then his extension of contract will be posted through this form. |
| **7.22** | **Salary Amendment:**  For any kind of scenario if staff gross salary need to be amend this screen will be used which data will be effective from next payroll. |
| **7.23** | **Performance Appraisal** | **Performance Appraisal Entry:**  Two type of Appraisal will be there.   1. Yearly Appraisal 2. Confirmation Appraisal (technical & non-technical) 3. KPI(Out of Scope S7:b)  * There are two types of Appraisals i.e. Appraisal from A is used for those staff are not under KPI and rest of the Appraisal shall be done by KPI format. * All appraisal forms (From A& KPI) shall be done through ESS betweenAppraise & Appraiser and sign off accordingly followed by department’s approval. * HR department will have the access all appraisals. * KPI set &appraisal (only performance) shall be reviewed quarterly and final appraisal (both performance & behavior part) in December each year. * KPI dashboard will generate key information’s of the analysis. * All reviews & final appraisals analysis report shall be generated by the system. * System will able to generate Top 10/20/30 performers list. * System will able to generate Bottom 10/20/30 performers list. * System will able to generate Top 10/20/30 clinics list. * System will able to generate Bottom 10/20/30 clinics list. * Clinic performance data shall be linked with KPI so that required measures can be done through system during appraisal. * HO line manager can send Performance Improvement or Appreciation letter from the template with necessary changes through the system. * Special appraisal using KPI can be done at any time for promotion or incrementor as required. * All appraisals shall be recorded year wise in each employee’s folder.(New) * From Appraisal from A & KPI, Training need information shall be incorporated as part of TNA.(New) |
| **7.24** | **HR Reporting** | Customized detail Staff list |
| **7.25** | Contract/Probationary list with expiration |
| **7.26** | Demographic analysis & reporting |
| **7.27** | Turnover analysis & reporting |
| **7.28** | Periodic report generation options |
| **7.29** | USAID compliance related reports |
| **7.30** | Time sheet calculation & uploading from MS Excel |
| **7.31** | Reports mentioned on earlier tabs |
| **7.32** |  | Tick box option on report generation |
|  |  | **FTE monthly statement as per MSB format(Format required)** |

***Requirement Specification Details:***

**Employment Configuration:**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **SL** | **Screen** | **Field** | | **Type** | **Data Type** | **Details** |
| **7.5** | **Employee Type** | | | | | |
|  | Employee Type | | Text Box | VARCHAR | Regular,  Contractual,  Probation |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
| **7.1** | **Project Setup** | | | | | |
|  | Project Name | |  |  |  |
| Code | |  |  |  |
| Start Date | |  |  |  |
| End Date | |  |  |  |
| Weekend | |  |  |  |
| Benefits | |  |  |  |
| Increment Type | |  |  |  |
| Increment Month | |  |  |  |
| Increment After 1 Year | |  |  |  |
| **Policy** | Benefits could be   * PF, * Gratuity, * End of Contract (EOC) * Earned Leave Encashment (EL), * Insurance * Gross Salary * Basic Salary * Type: Value can be 1. Core & 2. Project   Increment Type:   * General * Conditional | | | | |
|  | | | | | | |
| **7.1** | **Department Setup** | | | | | |
|  | Dept. Code | | Text Box | VARCHAR |  |
| Dept. Name | | Text Box | VARCHAR |  |
| Valid From | | Text Box | DATE |  |
| Valid To | | Text Box | DATE |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.1** | **Company/Unit Setup** | | | | | |
|  | Company Name | | Text Box | VARCHAR |  |
| Short Name | | Text Box | VARCHAR |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
| **Policy** | MSB & MCSC | |  |  |  |
|  | | | | | | |
| **7.1** | **Clinic/Office Setup** | | | | | |
|  | Clinic Name | | Text Box | VARCHAR |  |
| Clinic Code | | Text Box | VARCHAR |  |
| Clinic Category | | Dropdown | NUMBER |  |
| Address | | Text Box | VARCHAR |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
| **Policy** | Company Wise Clinic mapping with detail table. Total 141 Clinics | | | | |
|  |  | | | | | |
| **7.1** | **Clinic/Office Category** | | | | | |
|  | **Policy** | Categories are:  Head Office  MS Maternity  MSRC  MSC  Project Office | |  |  |  |
|  | | | | | | |
| **7.1** | **Technical Positions Requirement** | | | | | |
|  | Policy | Technical positions project, location, clinic category, designation wise Counting setup | | | | |
|  | | | | | | |
| **7.1** | **Program Setup** | | | | | |
|  | ProgramName | | Text Box | VARCHAR |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| Program/Dept. List | |  |  |  |
| ProgramList | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.5** | **Location/Cost Center Setup** | | | | | |
|  |  | Location Name | | Text Box | VARCHAR |  |
| Cost center code/Account Code | | Text Box | VARCHAR |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| Location List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.1** | **Designation Setup** | | | | | |
|  | Designation Name | | Text Box | VARCHAR |  |
| Short Name | | Text Box | VARCHAR |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| Job Title List | |  |  |  |
| Designation List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.1** | **Grade Setup** | | | | | |
|  | Grade Name | | Text Box | VARCHAR |  |
| Basic Min | | Text Box | NUMBER |  |
| Basic Max | | Text Box | NUMBER |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.1** | **Religion Setup** | | | | | |
|  | Religion Name | | Text Box | VARCHAR |  |
| Number of Basic | | Text Box | NUMBER |  |
| Percentage | | Text Box | NUMBER |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.1** | **Blood Group Setup** | | | | | |
|  | Blood Group Name | | Text Box | VARCHAR |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.1** | **Relation Setup** | | | | | |
|  | Relation Name | | Text Box | VARCHAR |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.1** | **Country Setup** | | | | | |
|  | Country Name | | Text Box | VARCHAR |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.1** | **Action Setup** | | | | | |
|  | Action Name | | Text Box | VARCHAR |  |
| Description | | Text Area | VARCHAR |  |
| Action Type | | Text Box | VARCHAR |  |
| Action Nature | | Dropdown | NUMBER |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.1** | **Education: Degree Setup** | | | | | |
|  | Degree Name | | Text Box | VARCHAR |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.1** | **Education: Institute Setup** | | | | | |
|  | Institute Name | | Text Box | VARCHAR |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.1** | **Education: Subject Setup** | | | | | |
|  | Subject Name | | Text Box | VARCHAR |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.1** | **Education: Result Setup** | | | | | |
|  | Result Name | | Text Box | VARCHAR |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.1** | **Education: Professional Degree Setup** | | | | | |
|  | List | |  |  |  |
| Save | | Button |  |  |
|  | | | | | | |
| **7.1** | **Special Skill Setup** | | | | | |
|  | Special Skill Name | | Text Box | VARCHAR |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.1** | **Home District Setup** | | | | | |
|  | Home District Name | | Text Box | VARCHAR |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
| **7.1** | **Festival Setup** | | | | |  |
|  | Festival Name | | Text Box | VARCHAR |  |
| Religion Name | | Drop Down | NUMBER |  |
| Make Inactive | | Check Box | CHAR(1) | DEFAULT ‘Y’ |
| List | |  |  |  |
| Refresh | | Button |  |  |
| Save | | Button |  |  |
| Delete | | Button |  |  |
|  | | | | | | |
|  | **Confirmation****Behavior Setup** | | | | | |
|  | | Behavior Name | | | |
|  | | | | | | |
|  | **Confirmation Overall Rating Setup** | | | | | |
|  | | Performance Level  Description  Definition | | | |
|  | | | | | | |
|  | **Grading Criteria Setup** | | | | | |
|  | | Grading Criteria | | | |
|  | | Criteria Group (General, Work Procedure, Work Experience, Organize Work, Interpersonal Skills) | | | |
|  | | | | | | |
|  | **Designation Wise Grading Criteria** | | | | | |
|  | | DesigId | | | |
|  | | CriteriaId | | | |

**Employment Operation:**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **SL No** | **Screen** | **Field** | | **Type** | **Data Type** | | | **Policy** |
| **7.1** | **Emp. Info (General)** | | | | | | | |
|  | Emp. ID | | Text Box | VARCHAR | | |  |
| Find | | Button |  | | |  |
| Emp Type | | Drop Down | NUMBER | | |  |
| Emp HR Info | | Link |  | | |  |
| Applicant Id | | Text Box | VARCHAR | | |  |
| Load Info | | Button |  | | |  |
| Title(Employee Name) | | Text Box | VARCHAR | | |  |
| First Name(Employee Name) | | Text Box | VARCHAR | | |  |
| Middle Name(Employee Name) | | Text Box | VARCHAR | | |  |
| Last Name(Employee Name) | | Text Box | VARCHAR | | |  |
| Emp Name(Employee Name) | | Text Box | VARCHAR | | |  |
| Address(Present) | | Text Area | VARCHAR | | |  |
| Phone(Present) | | Text Box | VARCHAR | | |  |
| Fax(Present) | | Text Box | VARCHAR | | |  |
| Address(Permanent) | | Text Area | VARCHAR | | |  |
| Phone(Permanent) | | Text Box | VARCHAR | | |  |
| Fax(Permanent) | | Text Box | VARCHAR | | |  |
| District | | Drop Down | NUMBER | | |  |
| Country | | Drop Down | NUMBER | | |  |
| Browse(Emp Photo) | | Button |  | | |  |
| Upload(Emp Photo) | | Button |  | | |  |
| Remove(Emp Photo) | | Button |  | | |  |
| Browse(Emp Signature) | | Button |  | | |  |
| Upload(Emp Signature) | | Button |  | | |  |
| Remove(Emp Signature) | | Button |  | | |  |
| Father’s Name | | Text Box | VARCHAR | | |  |
| Mother’s Name | | Text Box | VARCHAR | | |  |
| Gender | | Drop Down | NUMBER | | |  |
| DOB | | Calendar | DATE | | |  |
| Age | | Text Box | VARCHAR | | |  |
| Religion | | Drop Down | NUMBER | | |  |
| Blood Group | | Drop Down | NUMBER | | |  |
| DOB Id | | Text Box | VARCHAR | | |  |
| Marital Status | | Drop Down | NUMBER | | |  |
| Marriage DATE | | Calendar | DATE | | |  |
| Personal Email | | Text Box | VARCHAR | | |  |
| Nationality | | Text Box | VARCHAR | | |  |
| National ID | | Text Box | VARCHAR | | |  |
| Office Email | | Text Box | VARCHAR | | |  |
| TIN No. | | Text Box | VARCHAR | | |  |
| Circle | | Text Box | VARCHAR | | |  |
| Zone | | Text Box | VARCHAR | | |  |
| Passport No | | Text Box | VARCHAR | | |  |
| Passport Exp. DATE | | Calendar | DATE | | |  |
| Passport Issue Office | | Text Box | VARCHAR | | |  |
| Skype ID | | Text Box | VARCHAR | | |  |
| Office Ext. | | Text Box | VARCHAR | | |  |
| Cell Phone | | Text Box | VARCHAR | | |  |
| Land Phone | | Text Box | VARCHAR | | |  |
| Highest Education | | Drop Down | NUMBER | | |  |
| Professional Degree | | Drop Down | NUMBER | | |  |
| Special Skill | | Drop Down | NUMBER | | |  |
| Is relation in MSB | | Check Box | CHAR(1) | | | DEFAULT ‘Y’ |
| Relation | | Drop Down | NUMBER | | |  |
| Relative Name and ID | | Text Box | VARCHAR | | |  |
| License No. | | Text Box | VARCHAR | | |  |
| Exp. DATE | | Calendar | DATE | | |  |
| Medical or Non Medical | |  |  | | |  |
| Static or Out Reach | |  |  | | |  |
| BMDC Certificate Date | |  |  | | |  |
| BMDC Registration No. | |  |  | | |  |
| Save | | Button |  | | |  |
| Refresh | | Button |  | | |  |
| Delete | | Button |  | | |  |
|  | | | | | | | | |
| **7.1** | **Emp. Info (HR)** | | | | | | | |
|  | Emp. ID | | Text Box | VARCHAR | | |  |
| Find | | Button |  | | |  |
| Full Name | | Drop Down | NUMBER | | |  |
| Company/ Organization: MSB, MSCS | | Drop Down | NUMBER | | |  |
| Clinic | | Drop Down | NUMBER | | |  |
| Program | | Text Box | VARCHAR | | |  |
| Posting Date | | Button |  | | |  |
| Department | | Drop Down | NUMBER | | |  |
| Date in Position | | Calendar | DATE | | |  |
| Grade | | Drop Down | NUMBER | | |  |
| Date in Grade | | Calendar | DATE | | |  |
| Designation | | Drop Down | NUMBER | | |  |
| Name of Action | | Text Box | VARCHAR | | |  |
| Action Date | | Calendar | DATE | | |  |
| Place of Posting | | Drop Down | NUMBER | | |  |
| Employee Type | | Drop Down | NUMBER | | |  |
| Working Days | | Text Box | NUMBER | | |  |
| Location | | Drop Down | NUMBER | | |  |
| Contract Purpose | | Text Box | VARCHAR | | |  |
| Work Area | | Text Box | VARCHAR | | |  |
| Reason (if not) | | Text Box | VARCHAR | | |  |
| Gross Salary | | Text Box | NUMBER | | |  |
| Is Dept Head | | Check Box | CHAR(1) | | | DEFAULT ‘N’ |
| Supervisor | | Drop Down | NUMBER | | |  |
| Supervisor ID | | Text Box | VARCHAR | | |  |
| Salary Package | | Drop Down | NUMBER | | |  |
| Is Payroll Staff | | Check Box | CHAR(1) | | | DEFAULT ‘Y’ |
| Payroll Cycle | | Drop Down | NUMBER | | |  |
| Bank Account No | | Text Box | VARCHAR | | |  |
| Bank Name | | Drop Down | NUMBER | | |  |
| Branch Name | | Drop Down | NUMBER | | |  |
| Routing No | |  |  | | |  |
| Leave Package | | Drop Down | NUMBER | | |  |
| Weekend | | Drop Down | NUMBER | | |  |
| Attnd. Policy | | Drop Down | NUMBER | | |  |
| Joining DATE | | Calendar | DATE | | |  |
| Job Status | | Drop Down | NUMBER | | |  |
| Probation Period | | Text Box | VARCHAR | | |  |
| Confirmation DATE | | Calendar | DATE | | |  |
| Contract Interval | | Text Box | NUMBER | | |  |
| Contract End DATE | | Calendar | DATE | | |  |
| Is Service Agreement | | Check Box | CHAR(1) | | | DEFAULT ‘Y’ |
| Start DATE | | Calendar | DATE | | |  |
| End DATE | | Calendar | DATE | | |  |
| Retirement DATE | | Calendar | DATE | | |  |
| Separation DATE | | Calendar | DATE | | |  |
| Separation Type | | Drop Down | NUMBER | | |  |
| Separation Reason | | Text Box | VARCHAR | | |  |
| Is Not Rehirable | | Check Box | CHAR(1) | | | DEFAULT ‘Y’ |
| Reason of Not Rehirable | | Text Box | VARCHAR | | |  |
| Other Benefit | | Text Box | VARCHAR | | |  |
| Is Medical Entitlement | | Check Box | CHAR(1) | | | DEFAULT ‘Y’ |
| Remarks | | Text Box | VARCHAR | | |  |
| Is OT Entitlement | | Check Box | CHAR(1) | | | DEFAULT ‘Y’ |
| Is PF Deduction | |  |  | | |  |
| IS KPI | | Check Box | CHAR(1) | | |  |
| Browse (Emp CV) | | Button |  | | |  |
| Browse (Emp Signature) | | Button |  | | |  |
| Browse (Emp Document) | | Button |  | | |  |
| Refresh | | Button |  | | |  |
| Is New | | Check Box | CHAR(1) | | | DEFAULT ‘Y’ |
| Update | | Button |  | | |  |
|  | | | | | | | | |
| **7.1** | **Employee Search** | | | | | | | |
|  | Search By | | Drop Down | NUMBER | | |  |
| Sector | | Drop Down | NUMBER | | |  |
| Unit | | Drop Down | NUMBER | | |  |
| Grade | | Drop Down | NUMBER | | |  |
| Designation | | Drop Down | NUMBER | | |  |
| Department | | Drop Down | NUMBER | | |  |
| Employee Type | | Drop Down | NUMBER | | |  |
| Employee Status | | Drop Down | NUMBER | | |  |
| Show | | Button |  | | |  |
| Export to Excel | | Link |  | | |  |
|  | | | | | | | | |
| **7.18** | **HR Action: Additional Responsibility** | | | | | | | |
|  | Emp ID | | Text Box | VARCHAR | | |  |
| Find | | Button |  | | |  |
| Entry DATE | | Calendar | DATE | | |  |
| Name of Action | | Drop Down | NUMBER | | |  |
| Starting DATE | | Calendar | DATE | | |  |
| Ending DATE | | Calendar | DATE | | |  |
| Percent | | Text Box | NUMBER | | |  |
| Amount | | Text Box | NUMBER | | |  |
| Responsibility | | Text Area | VARCHAR | | |  |
| Calculate | | Button |  | | |  |
| Is Responsibility Allowance | | Check Box | CHAR(1) | | | DEFAULT ‘Y’ |
| Is Repeat | | Check Box | CHAR(1) | | | DEFAULT ‘Y’ |
| Refresh | | Button |  | | |  |
| Save | | Button |  | | |  |
|  | | | | | | | | |
| 7.19 | **HR Action: Confirmation** | | | | | | | |
|  | Emp ID | | Text Box | VARCHAR | | |  |
| Find | | Button |  | | |  |
| Entry Date | | Calendar | DATE | | |  |
| Name of Action | | Drop Down | NUMBER | | |  |
| Probation Period(Months) | | Text Box | NUMBER | | |  |
| Calculate | | Button |  | | |  |
| Start Date | | Calendar | DATE | | |  |
| Due Date of Confirmation | | Calendar | DATE | | |  |
| Extension Date | | Calendar | DATE | | |  |
| Extension (Months) | | Text Box | NUMBER | | |  |
| Confirmation Date | | Calendar | DATE | | |  |
| Remarks | | Text Area | VARCHAR | | |  |
| Refresh | | Button |  | | |  |
| Save | | Button |  | | |  |
|  | | | | | | | | |
| **7.15** | **HR Action: Disciplinary Action** | | | | | | | |
|  | Emp ID | | Text Box | VARCHAR | | |  |
| Find | | Button |  | | |  |
| Entry DATE | | Calendar | DATE | | |  |
| Name of Action | | Drop Down | NUMBER | | |  |
| Reason | | Text Box | NUMBER | | |  |
| DATE of Action | | Button |  | | |  |
| Review DATE | | Calendar | DATE | | |  |
| Is Reviewed | | Calendar | DATE | | |  |
| Is Suspend Increment | | Calendar | DATE | | |  |
| Remarks | | Text Area | VARCHAR | | |  |
| Disciplinary List | | Calendar | DATE | | |  |
| Remarks | | Text Area | VARCHAR | | |  |
| Refresh | | Button |  | | |  |
| Save | | Button |  | | |  |
|  | | | | | | | | |
| **7.16** | **HR Action: Employee Transition** | | | | | | | |
|  | Emp ID | | Text Box | VARCHAR | | |  |
| Find | | Button |  | | |  |
| Entry DATE | | Calendar | DATE | | |  |
| Transition Type | | Radio Button |  | | |  |
| IS New | | Check Box | CHAR(1) | | | DEFAULT ‘Y’ |
| Name of Action | | Drop Down | NUMBER | | |  |
| Designation | | Drop Down | NUMBER | | |  |
| Company | | Drop Down | NUMBER | | |  |
| Program | | Drop Down | NUMBER | | |  |
| Clinic | | Drop Down | NUMBER | | |  |
| Department | | Drop Down | NUMBER | | |  |
| Grade | | Drop Down | NUMBER | | |  |
| Division | | Drop Down | NUMBER | | |  |
| District | | Drop Down | NUMBER | | |  |
| Salary Location | | Drop Down | NUMBER | | |  |
| Gross Salary | | Text Box | NUMBER | | |  |
| Effective DATE | | Calendar | DATE | | |  |
| Next Increment DATE | | Calendar | DATE | | |  |
| Salary Change DATE | | Calendar | DATE | | |  |
| Grade Change DATE | | Calendar | DATE | | |  |
| Remarks | | Text Area | VARCHAR | | |  |
| Transition List | |  |  | | |  |
| Refresh | | Button |  | | |  |
| Save | | Button |  | | |  |
|  | | | | | | | | |
| 7.20 | **HR Action: Temporary Duty Assign** | | | | | | | |
|  | Emp ID | | Text Box | VARCHAR | | |  |
| Find | | Button |  | | |  |
| Name of Action | | Drop Down | NUMBER | | |  |
| Clinic | | Drop Down | NUMBER | | |  |
| Program | | Drop Down | NUMBER | | |  |
| Project | | Drop Down | NUMBER | | |  |
| Assignment | | Text Area | VARCHAR | | |  |
| Starting DATE | | Calendar | DATE | | |  |
| Ending DATE | | Calendar | DATE | | |  |
| Percentage | | Text Box | NUMBER | | |  |
| Amount | | Text Box | NUMBER | | |  |
| Supervisor Id | | Drop Down | NUMBER | | |  |
| Find | | Button |  | | |  |
| Supervisor Name | | Text Box | VARCHAR | | |  |
| Supervisor Comments | | Text Area | VARCHAR | | |  |
| Temporary Duty List | |  |  | | |  |
| Refresh | | Button |  | | |  |
| Save | | Button |  | | |  |
|  | | | | | | | | |
| 7.21 | **HR Action: Contract Extension** | | | | | | | |
|  | Emp ID | | Text Box | VARCHAR | | |  |
| Find | | Button |  | | |  |
| Entry DATE | | Calendar | DATE | | |  |
| Name of Action | | Drop Down | NUMBER | | |  |
| Effective DATE | | Calendar | DATE | | |  |
| Contract Expire on | | Calendar | DATE | | |  |
| Contract Extension List | |  |  | | |  |
| Refresh | | Button |  | | |  |
| Save | | Button |  | | |  |
|  | | | | | | | | |
| **7.22** | **HR Action: Salary Amendment** | | | | | | | |
|  | Emp ID | | Text Box | VARCHAR | | |  |
| Find | | Button |  | | |  |
| Entry DATE | | Calendar | DATE | | |  |
| Name of Action | | Drop Down | NUMBER | | |  |
| Effective DATE | | Calendar | DATE | | |  |
| Gross Salary | | Text Box | NUMBER | | |  |
| Increment Percentage | | Text Box | NUMBER | | |  |
| Remarks | | Text Area | VARCHAR | | |  |
| Refresh | | Button |  | | |  |
| Save | | Button |  | | |  |
|  | | | | | | | | |
| **7.17** | **HR Action: Separation** | | | | | | | |
|  |  | | Emp ID | Text Box | | VARCHAR |  | |
|  |  | | Find | Button | |  |  | |
|  |  | | Separation Mode | Drop Down | | NUMBER |  | |
|  |  | | Separation Date | Calendar | | DATE |  | |
|  |  | | Rehired Status | Text Box | | VARCHAR |  | |
|  |  | | Rehired Status Cause | Text Box | | VARCHAR |  | |
|  |  | | Separation List |  | |  |  | |
|  |  | | Remarks | Text Area | | VARCHAR |  | |
|  |  | | Refresh | Button | |  |  | |
|  |  | | Save | Button | |  |  | |
|  | | | | | | | | |
| **7.9** | **Employee Education** | | | | | | | |
|  | Emp ID | | Text Box | VARCHAR | | |  |
| Find | | Button |  | | |  |
| Education | | Drop Down | NUMBER | | |  |
| Institute/Board | | Drop Down | NUMBER | | |  |
| Subject | | Drop Down | NUMBER | | |  |
| Result | | Drop Down | NUMBER | | |  |
| Passing Year | | Text Box | VARCHAR | | |  |
| CGPA/Marks | | Text Box | VARCHAR | | |  |
| Degree Title | | Text Box | VARCHAR | | |  |
| Is Max Degree | | Check Box | CHAR(1) | | | DEFAULT ‘Y’ |
| Save | | Button |  | | |  |
| Refresh | | Button |  | | |  |
|  | | | | | | | | |
| 7.10 | **Experience** |  | |  |  | | |  |
|  | Emp ID | | Text Box | VARCHAR | | |  |
| Find | | Button |  | | |  |
| Job Title | | Drop Down | NUMBER | | |  |
| Company Name | | Drop Down | NUMBER | | |  |
| Starting DATE | | Calendar | DATE | | |  |
| Ending DATE | | Calendar | DATE | | |  |
| Duration | | Text Box | VARCHAR | | |  |
| Responsibility | | Text Box | VARCHAR | | |  |
| Is MSB | | Check Box | CHAR(1) | | | DEFAULT ‘Y’ |
| Is Emergency | | Check Box | CHAR(1) | | | DEFAULT ‘Y’ |
| Applicant ID | | Text Box | VARCHAR | | |  |
| Load Info | | Button |  | | |  |
| Experience List | |  |  | | |  |
| Save | | Button |  | | |  |
| Refresh | | Button |  | | |  |
| Delete | | Button |  | | |  |
|  | | | | | | | | |
| 7.11 | **Emergency Contract** | | | | | | | |
|  | Emp ID | | Text Box | VARCHAR | | |  |
| Find | | Button |  | | |  |
| Name | | Drop Down | NUMBER | | |  |
| Address | | Drop Down | NUMBER | | |  |
| Phone | | Calendar | DATE | | |  |
| Relation | | Calendar | DATE | | |  |
| Save | | Button |  | | |  |
| Refresh | | Button |  | | |  |
| Delete | | Button |  | | |  |
|  | | | | | | | | |
| **7.6** | **Nominee : Medical Beneficiary Nominee** | | | | | | | |
|  | Emp ID | | Text Box | VARCHAR | | |  |
| Find | | Button |  | | |  |
| Nominee Name | | Text Box | VARCHAR | | |  |
| Relation | | Drop Down | NUMBER | | |  |
| DATE of Birth | | Calendar | DATE | | |  |
| Gender | | Drop Down | NUMBER | | |  |
| Medical Beneficiary | | Text Area | VARCHAR | | |  |
| Witness | | Button |  | | |  |
| Nominee List | |  |  | | |  |
| Save | | Button |  | | |  |
| Delete | | Button |  | | |  |
| Refresh | | Button |  | | |  |
|  | | | | | | | | |
| **7.6** | **Nominee : Death Beneficiary Nominee** | | | | | | | |
|  | Emp ID | | Text Box | VARCHAR | | |  |
| Find | | Button |  | | |  |
| Nominee Name | | Text Box | VARCHAR | | |  |
| Relation | | Drop Down | NUMBER | | |  |
| DATE of Birth | | Calendar | DATE | | |  |
| Benefit | | Text Box | VARCHAR | | |  |
| Gender | | Drop Down | NUMBER | | |  |
| Medical Beneficiary | | Text Area | VARCHAR | | |  |
| Witness | | Button |  | | |  |
| Nominee List | |  |  | | |  |
| Save | | Button |  | | |  |
| Delete | | Button |  | | |  |
| Refresh | | Button |  | | |  |
|  | | | | | | | | |
| **7.6** | **Medical Benefit** | | | | | | | |
|  | Medical Fiscal Year | | Drop Down | NUMBER | | |  |
| Emp ID | | Text Box | VARCHAR | | |  |
| Find | | Button |  | | |  |
| Medicine | | Radio Button |  | | |  |
| Hospitalization | | Radio Button |  | | |  |
| Is Special Hospitalization | | Check Box | CHAR(1) | | | DEFAULT ‘Y’ |
| Medical DATE | | Calendar | DATE | | |  |
| Limit | | Text Box | NUMBER | | |  |
| Requested Amount | | Text Box | NUMBER | | |  |
| Approved Amount | | Text Box | NUMBER | | |  |
| Remarks | | Text Area | VARCHAR | | |  |
| Nominee | | Drop Down | NUMBER | | |  |
| Save | | Button |  | | |  |
| Refresh | | Button |  | | |  |
| List | |  |  | | |  |
|  | | | | | | | | |
| **7.12** | **References/Witness** | | | | | | | |
|  | Witness Name | | Drop Down | NUMBER | | |  |
| Witness Address | | Text Box | VARCHAR | | |  |
| DATE of Signature | | Button |  | | |  |
| Save | | Button |  | | |  |
| Refresh | | Button |  | | |  |
| Delete | | Button |  | | |  |
| List | |  |  | | |  |
|  | |  |  | | |  |
|  | | | | | | | | |
| **7.23** | **Performance Appraisal** | | | | | | | |
| **Confirmation Appraisal Form For All(After 6 months of joining or after completing probation period)** | | | | | | | |
|  | | EmpId  Appraised By  Date of Appraisal  Date of Confirmation   1. Performance    1. Performance Indicators   Indicator Progress Achieved(Detail Entry)   * 1. Major Difficulties Faced By Appraise   Difficulties Ways to overcome(Detail Entry)   * 1. Major Difficulties Faced By Appraiser   Difficulties Ways to overcome(Detail Entry)   1. Functioning within MS set up    1. Relationship with colleagues    2. Sincerity    3. Promptness in executing responsibilities 2. Any other comment(s) by the appraise 3. Any other comments by the appraiser 4. Recommendation of appraiser 5. Recommendation by Department Head 6. Approved/Comments by MD/CMC | | | | | |
| **Confirmation Appraisal Form For Technical Staffs (After 6 months of joining or after completing probation period)** | | | | | | | |
|  | | EmpId  Appraised By  Date of Appraisal  **Evaluation on Behavioral Skills**  BehaviorDefinition ??  **Evaluation on Technical Skills**  IndicatorsGradesSupport requiredOwn actions  **Did you receive induction trainingas required?**  Team member comments  Manager/ Supervisor comments  **Personal Development Plan**  Development Goal Time Scale Support Required Own Actions  **Overall Rating**  Performance Level | | | | | |
| **Annual Performance Appraisal** | | | | | | | |
|  | | Emp Id  Supervisor Id  Appraiser Id  Appraisal Date  Appraisal Time  Third Persons Id   * 1. Performance Review:   2. Job Responsibility   Job Grading Comments   * 1. Appraise & Supervisor comments on Staffs Good job   Job Explanation   * 1. Appraise & Supervisor comments on Staffs Weak job   Job Explanation   1. Grading Criteria:   Grading Criteria Name Grading (Multiple Entry)   1. Appraise Comments    1. What are the problematic areas you think at the time of your work & what are the solutions you think to overcome this problem?   Problem Resolution   * 1. How many inspiration & you get this year?  1. Training    1. Which type of training need [Appraises Opinion]?    2. Which type of training need [Appraisers Opinion]? 2. Next 6 Months Work Plan 3. Do you have any experience or assumption that MarieStopes can implement? 4. Appraises Comment   Appraisal Meeting Date & Time | | | | | |

**8. Payroll**

|  |  |  |
| --- | --- | --- |
| 8 | **Payroll** | |
|  | | |
| 8.1 | **salary & benefits** | **Salary break up:**  All staff’s salary will be considered and calculated based on Gross Salary.   |  |  |  | | --- | --- | --- | | Type | Head | Percent (%) | | Regular | Basic | 62.5 of Gross | |  | House Rent | 31.25 of Gross | |  | Medical | 6.25 of Gross | | Gross Salary | | 100 | |  | PF | 10 of Basic | | Contractual | Basic | 60 of Gross | |  | House Rent | 30 of Gross | |  | Medical | 10 of Gross | | Gross Salary | | 100 | | Probation | Gross Salary | 100 |   \* As no salary breakup has been defined for probation staff their income tax cannot be calculated from system. But after confirmation with salary break-up IT calculation from system will be possible.  The Salary head for payroll is as follows:  • Basic  • House Rent  • Medical  • Conveyance  • Others  • Arrear(+)  • Arrear(-)  • LWOP/Absent  \* Arrear (+) and Arrear (-)amount will be considered as Taxable Amount and this amount will be added to total taxable income for IT calculation.  \* Perday Salary Calculation=Gross Salary/30 Days. |
| 8.2 | **Bonus packages:**   * All religions Staff will get 2 bonuses on two Eid Vacation. 1 basic per Eid. * If Less than 1 month of joining, then staff will not get any bonus * If within 1 to 6 month of joining than staff will get pro rata basis bonus on basic salary. * If more than 6 months of joining than staff will get full basic. * This bonus amount will be processed & disbursed with salary or without salary. |
| 8.3 | **LWOP:**   * If employee service length is >= 2 years then he/she will be eligible for gratuity. But if he/she avail LWOP within this 2 year this LWOP days will be deducted from his gratuity period and once completing 2 years (24 months) of service excluding LWOP staff gratuity will be provided. Please see gratuity policy.   Gratuity Period= Actual Gratuity Days - LWOP days   * If staff takes more than 15 days LWOP then that leave period will be deducted from his service period & its impact will be on   + Mobile Bill   + Service Length   + Promotion   + Probation Period   \* Mobile Bill impact is not defined and hence it shall be manually adjusted during payment.  \* There is no payment head defined for mobile bill and hence it shall be provided with other salary head. |
| 8.4 | **Increment setup (auto/manual):**  **Increment Policy:**  • Join on January 1st to March 31st will get 100% increment.  • Join on April 1st to June 31st will get 75% increment.  • Join on July 1st to September 30th will get 50% increment.  • Join on October 1st to December 31st will get 0% increment.  •Location wise increment announces percentage should be there |
| 8.5 | **Cost center setup/linking:**  Cost centers mother bank account need to set while this account will be used for Bank Instruction. Cost center is meant by location. |
| 8.6 | **Banking setup:**  Bank and Branch setup facility will be provided. |
| 8.7 | **Gratuity** | **Monthly gratuity calculation & disbursement:**  Quarterly gratuity calculation & disbursement facility will be provided.  Gratuity policy is as follows:   * Basic/4 per quarter. * 4 quarters in a year * The basic will be the Employee Last Basic on the payment day as per payroll.   • If Service length is >= 2 yr staff will get gratuity from staff’sconfirmation month when his/her probation period is over and confirmed.  • Staffs Transfer: At the time of transfer, staff’s gratuity from one company to another company need to preserve. (MSB or MSCS)  • LWOP: If LWOP within 2 yr than gratuity eligible period is (Service Period from Confirmation +LWP Month) = 24 month.  • Usually Contractual staff will not get any gratuity. But if gratuity benefit exists for this staff’s project then he/she will get gratuity based on Gratuity Policy.  • If project period extends then benefit will revised & staff will get revised benefit. The revised benefits will be adjusted manually.  • If staff will not stay at the end date of project then he/she will not get any benefit.  • If a contractual staff becomes regular staff then his/her gratuity start date will be the confirmation date of regular. |
| 8.8 | **PF management** | **Monthly PF calculation, deduction & disbursement:**  • It is 10% of Basic  • If 6 months of joining date is over and staff is confirmed then his/her PF and company contribution will be count.  • PF Interest rate excel file yearly upload facility for each and every staff who entitle for PF.  • If staff salary has been provided as an Arrear to current month then PF own and PF company contribution of previous month will be added on current month PF own and PF Company contribution.   * There will be a yearlybalance transfer facility to next year |
| 8.9 | **Balance transfer to employee account against PF:**  At the time of transfer (company to company) staffs PF, gratuity from one company to another company need to preserve with transfer history. Opening PF & closing PF should be there. |
| 8.10 | **Yearly PF statement to all employee.**  [Please see annex for the format] |
| 8.11 | **Arrear** | **Any arrear calculation & disbursement:**  Staffs salary could be stopped. This held month’s salary will be disbursed as arrear & held up all months PF loan adjusted at processed month.  This additive arrear amount will be added with arrear (+) head & deductive arrear amount will be deducted with arrear (-) head.  However, this should be arrear and loan adjustment can be scheduled using Variable Allowance/Deduction feature of the system or changing the payroll data during preparation or after preparation. As well arrear amount and loan adjustment can also be addressed using file upload features. |
| 8.12 | **Leave** | **Leave adjustment on salary disbursement:**  LWOP/Absent Formula for each month: Gross Salary/Last day of the month\*LWOP which will be calculated during salary preparation.  Earned Leave Encashment Formula at Final Settlement: Gross Salary/30\* EL Balance |
| 8.13 | **Time sheet** | **Time sheet calculation & uploading from MS Excel:**  Timesheet will be auto generated from the monthly attendance data which has been imported from device as well has manually uploaded using excel file.  For charging excel file will be used to upload the charging percentage donor wise for each and every staff on each month.  Both excel file template will be provided and the same formatted file will be used to upload both data. |
| 8.14 | **Over Time** | **OT calculation for salary disbursement:**  Per Hour OT calculation formula:  (Basic /2340) \* 12  Per Hour OT calculation for weekend:  (Total OT Hour\*2) \*Per Hour Rate  This OT hour will be calculated for those staff who has been selected as OT staff from the HR information.  HOW THE OT AMOUNT WILL BE DISBURSED??? If it is with payroll, then specify the salary head. |
| 8.15 | **Loan management** | **Disbursement of loan, installment & settlement procedures:**  **PF Loan**  Staff can takePF Loan or Personal Loan from PF contribution: Actual PF loan amount with principle amount, Total installment, Rate, Interest, minimum installment barrier will be stored.  **PF loan for a duration of 2 years:** staff has to adjust loan with 13% interest. For early adjustment of PF loan employee has to pay minimum 60% of loan amount or 14 installments with interest. The remaining 40% amount can be adjusted without interest.  Loan Adjust Scale (Installment)   |  |  | | --- | --- | | Months of Adjust | installments with interest has to pay | | 1-15 | 15 | | 16-18 | 18 | | 19-24 | 24 (Full) |   **PF loan for a duration of 1 year:** staff has to adjust loan with 12% interest. For early adjustment of PF loan employee has to pay minimum 60% of loan amount or 6installments with interest. The remaining 40% amount can be adjusted without interest.  Loan Adjust Scale (Installment)   |  |  | | --- | --- | | Months of Adjust | installments with interest has to pay | | 1-6 | 6 | | 7-9 | 9 | | 10-12 | 12 (Full) |  * PF loan will deduction will be effective from next month’s salary. * If salary held up for some month then held up month’s PF loan will be adjusted at next salary processed month. * If staff quit before PF loan adjustment than remaining all months’ loan as well as interest will be adjusted at a time during final settlement.   **Salary Advance**   * The staffs who get PF & gratuity are applicable for taking salary advance and advance amount should be less than PF + Gratuity Amount. * 1 or more than 1-monthGrossSalary can be taken as advance & it will be adjusted from every month salary. It can be adjusted with partial salary amount or can be adjusted with installment no. In this case it must be schedule using Variable Allowance/Deduction feature of the system * All loan amount adjustment history need to keep. At the time of separation all outstanding amount need to clear or adjust using final settlement. |
| 8.16 | **Increment** | **Yearly increment calculation &disbursement:**  After completion of Appraisal increment will be provided to employee while the impact of this increment to salary package will be ensured by clicking on a Button.  **Yearly increment calculation & disbursement:**  Project Type: Value can be 1. Core & 2. Project   * Regular or Core Staffs increment or salary review will be conducted after his probation period or at his confirmation date. * Regular or Core Staffs next increment will be conducted at January for every year depending on increment policies month duration comparing his joining date. * Contractual or Project Staffs increment will be after completion of 1 year of project period.Staffswho joined at project initiation date will get increment full increment but those who joined after project start date will get prorate basis increment depending on project year. * Contractual or Project Staffs next increment will be done based on project year.   There will be a screen to provide Group/Individual Increment Facility Project Wise.  The increment can be provided as percentage of Gross Salary or Fixed amount which will be distributed to each gross salary head and PF based on policy defined in Salary break up of Section 9.1.  Increment Type has mentioned in Project Setup Screen. Types are  1. General  2. Conditional  Special Increment:  “This increment will not effect on general increment” flag need to maintain.  If this flag is checked than staff will get annual 100 % increment otherwise he will get month wise increment percentage.  \* Probation period staff are not eligible for Increment. |
| 8.17 | **Annual Performance Bonus** | **APB calculation & disbursement** |
| 8.18 | **COLA** | **Yearly COLA adjustment:**   * General increment type staff’s Yearly COLA with percentage 6.5 should be processed at January month of every year on gross salary. However, this will be a variable percentage and will be addressed by COLA adjustment screen of the system and will be on demand.   • Conditional increment type staff’s yearly COLA with assigned percentage should be processes at on demand. |
| 8.19 | **Employee Separation** | **Financial settlement after separation from MSB:**  **Regular Staff:**  At the time of Attendance Clearance Separated Staff’s will be highlighted and their “PF+Gratuity” amount will be displayed. Based upon the policy authorize user will uncheck the staff which salary will not processed with payroll. This separated staff list will be preserved for Final Settlement month wise.  **Policy:**   * At separate month staffs PF + Gratuity < Salary then his/her salary should be stop otherwise salary process. * Separated Staff’s all remaining salary will be processed using final settlement.   **Contractual Staff:**  At the time of Attendance Clearance Separated Staff’s will be highlighted. Based upon the policy authorize user will uncheck the staff which salary will not processed with payroll. This separated staff list will be preserved for Final Settlement month wise.  **Policy:**   * Separated Staff’s all remaining salary will be processed using final settlement.   **Common Policy:**  • If staff quit before PF Loan adjustment than he has to pay remaining principal amount & interest which will be deducted from salary amount.   * Earned Leave Encashment Formula at Final Settlement: Gross Salary/30\* EL Balance * LWOP/Absent Formula for each month: Gross Salary/Last day of the month\*LWOP * Following Financial impact will be considered for final settlement   + PF   + Gratuity   + PF Loan   + Salary Advance   + EL Encashment   + LWOP   + EOC   \* EOC: there will a provision to input EOC amount during final settlement which should be enter by the authorize user. |
| 8.20 | **Income Tax (IT)** | **Setting up Tax slabs:**  Region wise IT slab:   |  |  | | --- | --- | | Region | Minimum Tax | | Within Dhaka City Corporation | 5000 | | Within Chittagong City Corporation | 5000 | | Out of Dhaka City Corporation | 4000 | | Outside of City Corporation | 3000 |     Rebate: Govt. rule wise  Investment: Govt. rule wise  **LWOP will consider in IT???**  Other Tax Rebate: Additional tax rebate store facility should be there & this rebate amount will be added with actual rebate amount. Previous year rebate amount can be posted to current year rebate amount.  **Investment Rebate:**   |  |  | | --- | --- | | Taxable Income | Rebate Policy | | < 10,00,000 | 15% of 25% | | > 10,00,000 < 30,00,000 | 15% on 25,00,000  12% on rest amount | | > 30,00,000 | 15% on 25,00,000  12% on next 5,00,000  10% on rest amount | |
| 8.21 | IT information with source, deductions on monthly salary, adjustments facility will be provided. |
| 8.22 | **IT report generation:**  IT deposit report will be provided. [Please see annex for the format]  IT statement Report will be provided.[Please see annex for the format] |
| 8.23 | **Payroll Reports** | **Monthly Payslip / payment voucher:**  Monthly payslip will be generated as per format.[Please see annex for the format] |
| 8.24 | **Bank Advice letters:**  Monthly Bank Advice letters will be generated as per format.[Please see annex for the format] |
| 8.25 | **Finance & Accounts related different reporting:**  Payroll related report. [Please see annex for the format] |

***Requirement Specification Details:***

**Payroll Configuration:**

| **SL No.** | **Screen** | **Field** | **Type** | **Data Type** | **Policy** |
| --- | --- | --- | --- | --- | --- |
| 8.1 | **Salary Item Setup** | | | | |
|  | Item Title | Text Box | NVARCHAR | Salary Heads are:   * Basic * House Rent * Medical * Conveyance * Others * Arrear(+) * Arrear(-) * LWOP/Absent |
| Short title | Text Box | VARCHAR |  |
| Item type | Dropdown list | CHAR(1) | Additive/Deductive |
|  | Item Category | Dropdown list | CHAR(1) | Salary/Variable |
| Natural code | Text Box | Numeric(2) |  |
| Description | Text Area | VARCHAR () |  |
| Is Basic | Check Box | CHAR(1) | Is the item Basic? |
| Is PF Deduction | Check Box | CHAR(1) | Is the item deduction? |
| Is Allowance | Check Box | CHAR(1) | IS the item as Allowance |
| Make inactive | Check Box | CHAR(1) | The item is Active Y/N |
| Save | Button |  |  |
| Delete | Button |  |  |
| Refresh | Button |  |  |
| Salary Item List |  |  | Edit and view all item |
|  | | | | | |
| 8.1 | **Gross Salary items** | | | | |
|  | Select All | Link Button |  | Select all item from item list |
| Select None | Link Button |  | Un-select all item from list items |
| Salary item List with check box |  |  |  |
| Save | Button |  |  |
| **Policy:**  Need to select salary heads those are related to gross salary | | | | | |
|  | | | | | |
| 8.1 | **Payroll Salary items** | | | | |
|  | Select All | Link Button |  | Select all item from item list |
| Select None | Link Button |  | Un-select all item from list items |
| Salary item List with check box and Serial number text box | Item grid view list with input field |  |  |
| Save | Button |  | Save payroll Salary item data. |
| **Policy:**  Need to mention salary head sequence those are used to prepare salary sheet | | | | | |
|  | | | | | |
| 8.1 | **Pay slip Head Sequence** | | | | |
|  | Sequence No. | Text Box | Numeric(5) |  |
| Salary head | Dropdown list | Numeric(9) |  |
| Display type | label | Char(1) |  |
| Sequence List with **Edit** Action | Data grid view |  |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
|  | | | | | |
| 8.1 | **Employee Salary Package Setup** | | | | |
|  | Package title | Dropdown list | Numeric(5) | Display with employee ID and Name |
| Description | Text Field | VARCHAR |  |
| Make Inactive | Check box | Char(1) |  |
| Salary item List with Remove action and amount text field | Grid View |  |  |
| Generate | Button |  |  |
| Save | Button |  |  |
| Refresh | Button |  |  |
| Delete | Button |  |  |
| Tab-2 |  |  |  |
| Show all Record |  |  |  |
| Package title |  |  |  |
| Search Button | Button |  |  |
| Package List With Edit action |  |  |  |
|  | | | | | |
| 8.2 | **Bonus Package** | | | | |
|  | Job Duration | Dropdown list | Numeric(2) |  |
| Percentage | Text Field | Numeric(3) |  |
| Is Prorate | Checkbox | Char(1) |  |
| Bonus Policy List with Edit Action | Data grid view |  |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
|  | | | | | |
| **8.6** | **Bank Setup** | | | | |
|  | Select Bank | Dropdown list | Numeric(3) |  |
| New bank code | Text Box | VARCHAR |  |
| New Bank Name | Text Box | VARCHAR |  |
| Routing No | Text Box | VARCHAR |  |
| Branch name | Text Box | VARCHAR |  |
| District | Text Box | VARCHAR |  |
| DOS | Dropdown list | Char(1) |  |
| Select Bank | Dropdown list |  |  |
| Search | Button |  |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
|  | | | | | |
| **8.1** | **Currency Setup** | | | | |
|  | Currency name | Text Box | VARCHAR |  |
| Currency Symbol | Text Box | VARCHAR |  |
| Smallest unit name | Text Box | VARCHAR |  |
| Sat as optional currency | Check Box | CHAR(1) |  |
| Conversion amount for each unite | Text Box | numeric |  |
| Make inactive | Check Box | Char()1 |  |
| Currency list with edit action | Data Grid view |  |  |
| Save | Button |  |  |
| Refresh | Button |  |  |
| Delete | Button |  |  |
|  | | | | | |
| **8.1** | **Fiscal Year Setup** | | | | |
|  | Fiscal Year Title | Text Box | VARCHAR |  |
| Is FY TAX | Check box | Char(1) | Fiscal Year July to June |
| Is FY PF | Check box | Char(1) | Fiscal Year Jan to Dec |
| Start Date | Date Field | Date time |  |
| End Date | Date Field | Date Time |  |
| Description | Text Area | VARCHAR |  |
| Close | Check box | Char(1) |  |
| Current Fiscal Year | Check box | Char(1) |  |
| Fiscal Year List with edit action | Data Grid view |  |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
|  | | | | | |
| **8.1** | **Loan Type Setup** | | | | |
|  | Loan type Name | Text Box | VARCHAR | Types of loan |
| Description | Text Area | VARCHAR |  |
| Salary Head | Dropdown List | numeric |  |
| Make inactive | Check Box | Char(1) | To make Inactive this loan type |
| Is PF Loan | Check Box | Char(1) | If the Loan is PF Loan, checked the box |
| Eligible service life | Text Box |  | Number of month for applicable to get the loan. |
| Loan Type List | Data Grid view List with Edit Action |  |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
|  | | | | | |
| **8.1** | **Payroll Policy Setup** | | | | |
|  | Fiscal year | Drop Down List | Numeric |  |
| Valid From | Date Field | Date Time |  |
| Valid To | Date Field | Date Time |  |
| Save | Button |  |  |
| Benefits Policies part |  |  |  |
| Head Type | Drop Down List | numeric |  |
| Emp. Type | Drop Down List | numeric |  |
| Is Percent | Check Box | Char(1) |  |
| Value | Text box | numeric |  |
| Percentage Head | Drop Down List | Numeric |  |
| Benefits policy List | Grid view |  |  |
| Save | Button |  |  |
| Monthly payroll cycle policy |  |  |  |
| Policy Title | Text Box | VARCHAR |  |
| Monthly cycle Start date | Dropdown list | Numeric |  |
| Monthly Cycle End Date | Dropdown list | Numeric |  |
| Monthly Attendance Cycle Start date | Dropdown list | Numeric |  |
| Monthly Attendance cycle end date | Dropdown list | Numeric |  |
| Monthly policy Cycle List | Grid view |  |  |
| Save | Button |  |  |
|  | | | | | |
| **8.20** | **IT Policy** | | | | |
|  |  | Yearly House Rent Max Exemption For Male, Female & Autistic | Text Box | Numeric |  |
| Monthly House Rent Exemption For Male, Female & Autistic | Text Box | Numeric |  |
| Yearly Transport Allowance Exemption For Male, Female & Autistic | Text Box | Numeric |  |
| Yearly Medical Allowance Exemption For Male, Female & Autistic | Text Box | Numeric |  |
| 0 Income Tax Slot For Male, Female & Autistic | Text Box | Numeric |  |
| 10% Income Tax Slot For Male, Female & Autistic | Text Box | Numeric |  |
| 15% Income Tax Slot For Male, Female & Autistic | Text Box | Numeric |  |
| 20% Income Tax Slot For Male, Female & Autistic | Text Box | Numeric |  |
| 25% Income Tax Slot For Male, Female & Autistic | Text Box | Numeric |  |
| Investment Allowance For Male, Female & Autistic | Text Box | Numeric |  |
| Investment Rebate For Male, Female & Autistic | Text Box | Numeric |  |
| Minimum Tax For Male, Female & Autistic | Text Box | Numeric |  |
| Save | Button |  |  |
|  | | | | | |
| **8.1** | **Salary Head Block** | | | | |
|  | Employee | Drop down List | numeric |  |
| Salary Head | Drop down List | numeric |  |
| From Date | Date Field | DateTime |  |
| To Date | Date Field | DateTime |  |
| Block amount | Text Filed |  |  |
| List View | Data Grid View |  |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Close | Button |  |  |
|  | | | | | |
| **8.1** | **USD Rate** | | | | |
|  | USD Rate | Text box | numeric | Last entry date dated rate is considered |
| USD Rate Date | Date Field | Date Time |  |
| USD Rate List | Grid view with edit option |  |  |
|  | | | | | |
| **8.1** | **Options** (Save as a global variable for all employee, system calculate the retirement date by the value ) | | | | |
|  | Retirement Age | Text Box | numeric |  |
| Concern HO Admin Id | Text Box | VARCHAR |  |
| Save | Button |  |  |
| Refresh | Button |  |  |

**Payroll Operation:**

| **SL No.** | | **Screen** | **Field** | | | | **Type** | | **Data Type** | | | **Policy** | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Attendance Clearance**(Before payroll process we must need to adjust attendance with the screen) | | | | | | | | | | | | |
|  | | | | Payroll Cycle | Dropdown | | | | Numeric |  | | |
| Month | Dropdown | | | | Numeric |  | | |
| Year | Dropdown | | | | Numeric |  | | |
| Employee Type | Dropdown | | | | Numeric |  | | |
| Employee ID | Text Box | | | | VARCHAR |  | | |
| Clearance Date | Date Field | | | | DateTime |  | | |
| Generate | Button | | | |  |  | | |
| Clearance List with month day & Salary day text box | Grid view | | | |  |  | | |
| Select All | Link button | | | |  | On click ,checked all record of Clear list | | |
| None | Link button | | | |  | On click , un-check all record of Clear list | | |
| Refresh | Button | | | |  |  | | |
| Save in Payroll Basket | Button | | | |  |  | | |
| Payroll basket list | Grid view | | | |  |  | | |
| Delete | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
|  | **Allowance Deduction 🡪 Variable Allowance** | | | | | | | | | | | | |
| Variable Allowance( Employee can get addition or deduction amount with the salary with given salary head for given time period) | | | | | | | | | | | | |
|  | | | | Employee | Dropdown | | | | VARCHAR |  | | |
| Add | Button | | | |  |  | | |
| Remarks | Text Area | | | | VARCHAR |  | | |
| Salary Item | Dropdown list | | | | Numeric |  | | |
| Amount | Text field | | | | Numeric |  | | |
| Effective From | Date field | | | | DateTime |  | | |
| Effective To | Date field | | | | DateTime |  | | |
| Generate | Button | | | |  |  | | |
| Employee List | Grid view | | | |  |  | | |
| Save | Button | | | |  |  | | |
| Delete | Button | | | |  |  | | |
| Refresh | Button | | | |  |  | | |
| Synchronize | Button | | | |  |  | | |
| Select Record | Dropdown | | | | Numeric | Active/ In-active | | |
|  | | | | | | | | | | | | | |
| **8.11** | **Arrear** | | | | | | | | | | | | |
| Policy | | | | Any arrear calculation & disbursement: Staffs salary could be stopped. This held month’s salary will be disbursed as arrear & held up all months PF loan adjusted at processed month.  This additive arrear amount will be added with arrear (+) head & deductive arrear amount will be deducted with arrear (-) head. | | | | | | | | |
|  | | | | | | | | | | | | | |
|  | **Bonus Allowance** | | | | | | | | | | | | |
|  | | | | Religion | Dropdown | | | |  |  | | |
| Festival | Dropdown | | | |  |  | | |
| Fiscal Year | Dropdown | | | |  |  | | |
| Tax Fiscal Year | Dropdown | | | |  |  | | |
| Month | Dropdown | | | |  |  | | |
| Year | Dropdown | | | |  |  | | |
| Festival Date | Date Field | | | |  |  | | |
| Employee Type | Dropdown | | | |  |  | | |
| Generate | Button | | | |  |  | | |
| Employee List | Grid view | | | |  |  | | |
| Refresh | Button | | | |  |  | | |
| Save & Disburse | Button | | | |  |  | | |
| Save | Button | | | |  |  | | |
| Delete | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
|  | **File Upload**(Upload any salary Item) | | | | | | | | | | | | |
|  | | | | Month | Dropdown | | | | Numeric |  | | |
| Year | Dropdown | | | | Numeric |  | | |
| Salary Item | Dropdown | | | | Numeric |  | | |
| Choose File | File | | | |  |  | | |
| Upload | Button | | | |  |  | | |
| List View | Grid view | | | |  |  | | |
| Refresh | Button | | | |  |  | | |
| Save | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
| **8.14** | **OT Adjustment** | | | | | | | | | | | | |
|  | | | | Employee Search |  | | | |  |  | | |
| Month | Dropdown | | | | Numeric |  | | |
| Year | Dropdown | | | | Numeric |  | | |
| OT Hour | Text Box | | | | Numeric |  | | |
| OT Approve Hour | Text Box | | | | Numeric |  | | |
| Basic | Text Box | | | | Numeric |  | | |
| OT Amount/Hour | Text Box | | | | Numeric |  | | |
| OT Amount | Text Box | | | | Numeric |  | | |
| Entry Date | Date Field | | | | Date Time |  | | |
| Refresh |  | | | |  |  | | |
| Save |  | | | |  |  | | |
| Delete |  | | | |  |  | | |
| View List | Gridview | | | |  |  | | |
|  | | | | | | | | | | | | | |
|  | **Payroll process** | | | | | | | | | | | | |
|  | | | | Fiscal Year | Dropdown | | | | Numeric |  | | |
| Month | Dropdown | | | | Numeric |  | | |
| Year | Dropdown | | | | Numeric |  | | |
| Employee Status | Dropdown | | | | Numeric |  | | |
| Employee Type | Dropdown | | | | Numeric |  | | |
| Process Date | Date Field | | | | Date time |  | | |
| Percentage | Text Box | | | | Numeric |  | | |
| Employee ID | Text Box | | | | VARCHAR |  | | |
| Generate | Button | | | |  |  | | |
| Data List View | Grid View with | | | |  |  | | |
| Prepare | Button | | | |  |  | | |
| Delete | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
|  | **Payroll Correction (after payroll process, user can edit data)** | | | | | | | | | | | | |
|  | | | | Generate For | Dropdown | | | | Numeric |  | | |
| Location | Dropdown | | | | Numeric |  | | |
| Month | Dropdown | | | | Numeric |  | | |
| Year | Dropdown | | | | Numeric |  | | |
| Employee ID | Text box | | | | VARCHAR |  | | |
| Employee Type | Dropdown | | | | Numeric |  | | |
| Get Payroll Prepared data | Button | | | |  | Payroll process data view on data grid view with given searching parameters | | |
| Payroll Data List with **Edit** option | Grid View | | | |  |  | | |
| Select All | Link Button | | | |  |  | | |
| None | Link Button | | | |  |  | | |
| Send email to verify | Button | | | |  |  | | |
| Save | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
|  | **Payroll Review** | | | | | | | | | | | | |
|  | | | | Generate For | Dropdown | | | | Numeric | Bank Wise/All | | |
| Bank List | Dropdown | | | | Numeric |  | | |
| Month | Dropdown | | | | Numeric |  | | |
| Year | Dropdown | | | | Numeric |  | | |
| Employee Type | Dropdown | | | | Numeric |  | | |
| Gat Payroll Data | Button | | | |  | Payroll Processed data load on payroll for review | | |
| Payroll for Review list | Grid view | | | |  |  | | |
| print | Button | | | |  |  | | |
| Click to Review Payroll | Button | | | |  |  | | |
| Reviewed payroll | Grid view | | | |  |  | | |
|  | | | | | | | | | | | | | |
|  | **Payroll Approval** | | | | | | | | | | | | |
|  | | | | Generate For | Dropdown | | | | Numeric | Bank Wise/All | | |
| Bank List | Dropdown | | | | Numeric |  | | |
| Month | Dropdown | | | | Numeric |  | | |
| Year | Dropdown | | | | Numeric |  | | |
| Employee Type | Dropdown | | | | Numeric |  | | |
| Get Payroll Data | Button | | | |  | Payroll Processed data load on payroll for review | | |
| Payroll for Approval list | Grid view | | | |  |  | | |
| print | Button | | | |  |  | | |
| Click to Approve Payroll | Button | | | |  |  | | |
| Approved payroll | Grid view | | | |  |  | | |
|  | | | | | | | | | | | | | |
|  | **Payroll Disbursement** | | | | | | | | | | | | |
|  | | | | Generate For | Dropdown | | | | Numeric | Bank Wise/All | | |
| Bank List | Dropdown | | | | Numeric |  | | |
| Month | Dropdown | | | | Numeric |  | | |
| Year | Dropdown | | | | Numeric |  | | |
| Employee Type | Dropdown | | | | Numeric |  | | |
| Get Payroll Data | Button | | | |  | Payroll Processed data load on payroll for disbursement | | |
| Payroll Data List | Grid view | | | |  |  | | |
| Send for bank Instruction | Button | | | |  |  | | |
| print | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
|  | **Payroll Report** | | | | | | | | | | | | |
|  | | | | Generate For | Dropdown | | | | Numeric | Bank Wise/All | | |
| Location List | Dropdown | | | | Numeric |  | | |
| Month | Dropdown | | | | Numeric |  | | |
| Year | Dropdown | | | | Numeric |  | | |
| Employee ID |  | | | |  |  | | |
| Employee Type | Dropdown | | | | Numeric |  | | |
| Generate Report | Button | | | |  |  | | |
| Report view | Grid View | | | |  |  | | |
| Print | Button | | | |  |  | | |
| Export to Excel | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
|  | **Payroll Movement Edit** | | | | | | | | | | | | |
|  | | | | Generate For | Dropdown | | | | Numeric | Bank Wise/All | | |
| Location List | Dropdown | | | | Numeric |  | | |
| Month | Dropdown | | | | Numeric |  | | |
| Year | Dropdown | | | | Numeric |  | | |
| Employee ID |  | | | |  |  | | |
| Employee Type | Dropdown | | | | Numeric |  | | |
| Generate Payroll Movement | Button | | | |  |  | | |
| Payroll Cost Summery List | Grid view | | | |  |  | | |
| Movement Detail List | Button | | | |  |  | | |
| Movement validation List | Grid view | | | |  |  | | |
| Show Movement Log | Button | | | |  |  | | |
| Movement log List | Grid view | | | |  |  | | |
| Print | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
|  | **Payroll MovementReport** | | | | | | | | | | | | |
|  | | | | Generate For | Dropdown | | | | Numeric | Bank Wise/All | | |
| Location List | Dropdown | | | | Numeric |  | | |
| Month | Dropdown | | | | Numeric |  | | |
| Year | Dropdown | | | | Numeric |  | | |
| Employee ID |  | | | |  |  | | |
| Employee Type | Dropdown | | | | Numeric |  | | |
| Generate Payroll Movement | Button | | | |  |  | | |
| Payroll Cost Summery List | Grid view | | | |  |  | | |
| Movement Detail List | Button | | | |  |  | | |
| Movement validation List | Grid view | | | |  |  | | |
| Show Movement Log | Button | | | |  |  | | |
| Movement log List | Grid view | | | |  |  | | |
| Print | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
|  | **Monthly Pay slip** | | | | | | | | | | | | |
| **Monthly Payslip Report** | | | | | | | | | | | | |
|  | | | | Payroll month | Dropdown | | | | Numeric |  | | |
| Payroll Year | Dropdown | | | | Numeric |  | | |
| Employee Type | Radio button | | | | Char | Active / In-active employee | | |
| Employee | Dropdown | | | | Varchar |  | | |
| Pay slip Type | Radio button | | | | char | Salary/ Bonus | | |
| Print Preview | Button | | | |  |  | | |
| **Email Pay slip** | | | | | | | | | | | | |
|  | | | | Generate For | Dropdown | | | | Numeric | Bank Wise/All | | |
| Location List | Dropdown | | | | Numeric |  | | |
| Month | Dropdown | | | | Numeric |  | | |
| Year | Dropdown | | | | Numeric |  | | |
| Employee ID |  | | | |  |  | | |
| Employee Type | Dropdown | | | | Numeric |  | | |
| Bonus only | Check box | | | | char |  | | |
| Get pay slip employee | Button | | | |  |  | | |
| Clear All | Link Button | | | |  |  | | |
| Employee List view | Gridview | | | |  |  | | |
| Send mail | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
| **8.24** | **Bank Instruction** | | | | | | | | | | | | |
|  | | | | Select Report | Radio Button | | | | char | S2B Format/ BEFTN Format | | |
| Select Payment Type | Radio Button | | | | char | Salary/ Only Bonus | | |
| Payroll Month | Dropdown | | | | Numeric |  | | |
| Payroll Year | Dropdown | | | | Numeric |  | | |
| Bank | Dropdown | | | | Numeric |  | | |
| Print Preview | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
| **8.21** | **Income Tax** | | | | | | | | | | | | |
| **IT Deposit Record** | | | | | | | | | | | | |
|  | | | | Posting place | Checkbox | | | | Numeric |  | | |
| Month | Checkbox | | | | Numeric |  | | |
| Year | Checkbox | | | | Numeric |  | | |
| Fiscal year | Checkbox | | | | Numeric |  | | |
| Employee type | Checkbox | | | | Numeric |  | | |
| Get IT Record | Button | | | |  |  | | |
| Export to Excel | Button | | | |  |  | | |
| Employee List | Grid view | | | |  |  | | |
| Clear All | Link Button | | | |  |  | | |
| Challan no | Text Field | | | | Varchar |  | | |
| Bank | Text Field | | | | Varchar |  | | |
| Deposit Date | Date Field | | | | Date Time |  | | |
| Save | Button | | | |  |  | | |
| **8.22** | **IT Deposit Report** | | | | | | | | | | | | |
|  |  | | | | Posting Division | Dropdown | | | | Numeric |  | | |
| Fiscal year | Dropdown | | | | Numeric |  | | |
| Get IT Records |  | | | |  |  | | |
| IT Deposit List |  | | | |  |  | | |
| Print |  | | | |  |  | | |
| **8.22** | **IT Statement** | | | | | | | | | | | | |
|  | | | | Employee Type | Radio Button | | | |  |  | | |
| Fiscal Year | Dropdown | | | | Numeric |  | | |
| Employee | Dropdown | | | | Varchar |  | | |
| Print Preview |  | | | |  |  | | |
| **8.22** | **Salary and Income Tax** | | | | | | | | | | | | |
|  |  | | | | Fiscal Year | Dropdown | | | | Numeric |  | | |
| Month | Dropdown | | | | Numeric |  | | |
| Location | Dropdown | | | | Numeric |  | | |
| Salary item list with selection and Sequence | Grid view | | | |  |  | | |
| Print Preview | Button | | | |  |  | | |
| **8.22** | **IT Report with Salary** | | | | | | | | | | | | |
|  | | | | Select Group | Dropdown | | | | Numeric |  | | |
| Office | Dropdown | | | | Numeric |  | | |
| Fiscal Year | Dropdown | | | | Numeric |  | | |
| Get IT Record | Button | | | |  |  | | |
| Data view List | Grid View | | | |  |  | | |
| Print | Button | | | |  |  | | |
| Export to Excel | Button | | | |  |  | | |
| **8.21** | **IT Calculation** | | | | | | | | | | | | |
|  | | | | Month | Dropdown | | | | Numeric |  | | |
| Income Year | Dropdown | | | | Numeric |  | | |
| Assessment year | Dropdown | | | | Numeric |  | | |
| Employee type | Dropdown | | | |  |  | | |
| Employee Search | Text box | | | |  |  | | |
| Income tax list view with Edit option | Grid view | | | |  |  | | |
| Print | Button | | | |  |  | | |
| Export to excel | Button | | | |  |  | | |
| Save | Button | | | |  |  | | |
| Refresh | Button | | | |  |  | | |
| Update salary package | Button | | | |  | Salary package item will be changed with edited value | | |
| Prepare Breakdown of investment | Button | | | |  | Prepare investment breakdown | | |
| Modify list | Button | | | |  | If need any modification with the calculation | | |
| **8.22** | **IT Calculation Report** | | | | | | | | | | | | |
|  | | | | Month | Dropdown | | | | numeric |  | | |
| Year | Dropdown | | | | Numeric |  | | |
| Employee Search | Text field with search button | | | | Varchar |  | | |
| IT calculation Report | Button | | | |  |  | | |
| Employee List | Grid view | | | |  |  | | |
| Print | Button | | | |  |  | | |
| Export to Excel | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
| **8.8** | | **PF Loan** | | | | | | | | | | | |
|  | | Emp Code | | | | Text Box | | VARCHAR | | |  |
| SL No | | | | Text Box | | VARCHAR | | |  |
| Date | | | | Calendar | | DATE | | |  |
| Loan Month | | | | Drop Down | | NUMERIC | | |  |
| Loan Amount | | | | Text Box | | NUMERIC | | |  |
| Monthly Repay | | | | Text Box | | NUMERIC | | |  |
| Monthly Interest | | | | Text Box | | NUMERIC | | |  |
| Fiscal Year | | | | Drop Down | | NUMERIC | | |  |
| Loan Rate | | | | Text Box | | NUMERIC | | |  |
| Installment | | | | Text Box | | NUMERIC | | |  |
| Cheque Number | | | | Text Box | | NUMERIC | | |  |
| Cheque Date | | | | Calendar | | DATE | | |  |
| Bank Detail | | | | Text Box | | VARCHAR | | |  |
| Refresh | | | | Button | |  | | |  |
| Save | | | | Button | |  | | |  |
| Delete | | | | Button | |  | | |  |
|  | | | | | | | | | | | | | |
| **8.8** | | **PF Loan Adjustment: Loan, Repay & Deduction Adjustment in PF** | | | | | | | | | | | |
|  | | Emp Code | | | |  | |  | | |  |
| SL No | | | | Text Box | | VARCHAR | | |  |
| Date | | | | Calendar | | DATE | | |  |
| Adjustment Month | | | | Drop Down | | NUMERIC | | |  |
| Adjustment Type | | | | Drop Down | | NUMERIC | | |  |
| Adjustment Amount | | | | Text Box | | NUMERIC | | |  |
| Fiscal Year | | | | Drop Down | | NUMERIC | | |  |
| Remarks | | | | Text Area | | VARCHAR | | |  |
| Refresh | | | | Button | |  | | |  |
| Save | | | | Button | |  | | |  |
| Delete | | | | Button | |  | | |  |
|  | | | | | | | | | | | | | |
| **8.8** | | **Monthly PF Activities** | | | | | | | | | | | |
|  | | Month | | | | Drop Down | | NUMERIC | | |  |
| Fiscal Year | | | | Drop Down | | NUMERIC | | |  |
| Show | | | | Button | |  | | |  |
| Tab 1: Loan | | | | List | |  | | |  |
| Tab 2: Adjustment | | | | List | |  | | |  |
| Tab 3: Final Payment | | | | List | |  | | |  |
| Print | | | | Button | |  | | |  |
| Export To Excel | | | | Button | |  | | |  |
|  | | | | | | | | | | | | | |
| **8.7** | **Gratuity** | | | | | | | | | | | | |
| **Gratuity Process (Process Quarterly)** | | | | | | | | | | | | |
|  | | | | Gratuity process date | Date Field | | | | Date Time |  | | |
| Process Month | Dropdown | | | | Numeric |  | | |
| Quarter | Dropdown | | | | Numeric |  | | |
| Fiscal Year | Dropdown | | | | Numeric |  | | |
| Process Year | Dropdown | | | | Numeric |  | | |
| Process | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
|  | **Salary Source/Donor Entry** | | | | | | | | | | | | |
|  | | | | Donor Code |  | | | |  |  | | |
| Name |  | | | |  |  | | |
| Activity Code |  | | | |  |  | | |
|  | | | | | | | | | | | | | |
|  | **Staff’s Salary Charging** | | | | | | | | | | | | |
|  | | | | Employee Search | Text Box Search | | | |  |  | | |
| Entry Date | Date Field | | | | Date Time |  | | |
| Salary Source/Donor | Dropdown | | | | Numeric |  | | |
| Percentage | Text Box | | | | Numeric |  | | |
| Is Active | Check box | | | |  |  | | |
| List view | Grid view with Edit and Delete option | | | |  |  | | |
| Refresh | Button | | | |  |  | | |
| Save | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
|  | **Salary Charging Upload** | | | | | | | | | | | | |
|  | | | | Choose File | File | | | |  |  | | |
| Upload | Button | | | |  |  | | |
| Generate | Button | | | |  |  | | |
| Salary Charge List | Grid view | | | |  |  | | |
| Refresh | Button | | | |  |  | | |
| Save | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
| **8.18** | **COLA Adjustment** | | | | | | | | | | | | |
|  | | | | Employee Grade | Dropdown | | | | Numeric |  | | |
| COLA Percentage | Text box | | | | Numeric |  | | |
| Effective Date | Date field | | | | Date Time |  | | |
| Generate | Button | | | |  |  | | |
| Employee List | Grid view | | | |  |  | | |
| Refresh | Button | | | |  |  | | |
| Adjust Salary head | Button | | | |  |  | | |
|  | | | | | | | | | | | | | |
| **8.19** | **Final Payment Entry/ Final Settlement** | | | | | | | | | | | | |
|  | | | | Employee Search | Text box search | | | |  |  | | |
| Process Date | Date field | | | | Date Time |  | | |
| Due Date | Date Field | | | | Date Time |  | | |
| Payment Amount | Text box | | | | Numeric |  | | |
| PF Amount | Text Box | | | | Numeric |  | | |
| Remarks | Text Area | | | | VARCHAR |  | | |
| Refresh | Button | | | |  |  | | |
| Save | Button | | | |  |  | | |

**9 Training & Development**

|  |  |  |
| --- | --- | --- |
| **9** | **Training& Development** | |
|  | | |
| **9.1** | **Training category** | **Training Matrix (Technical/non-technical, home/abroad) setup:**  **Training Category Setup:**  Training Category can be   * technical, * non-technical, * refresher, * informal, * international, * workshop etc. |
| **9.2** | **Training Setup** | Training setup will store the information regarding the training details. The attributes will be Training Category, Training Title, Duration, Cost Per Person, Income Per Person, In-house/Outdoor, Medicoz (Y/N).  Each training duration may vary by designation. |
| **9.3** | **Training calendar** | **Training schedule set up:**  Each Training session will be scheduled through the system by selecting with Start Date, End Date, Cost (Fee & Income), Course Coordinator, Maximum Participant, Resident Cost (if required), Venue.  The training schedule will also contain funding details.  Schedule can be edited with remarks.  Training schedule will be approved before the session start. |
| **9.4** |  | **Training budget generation:**  Per day wise course fee is fixed. Residential and nonresidential training costs are different.  Attributes for budget preparation are No of participant, training name, internal/external venue name, duration, project name, training time.  Each of the training session which will be schedule will contain budget information. |
| **9.5** | **Participants** | **Sourcing internal candidates from HR database:**  Each participant for a training session will be enlisted through requisition process.  Requisition will be prepared and approved for enlisting into the session.  Training information with participant list:  After enlisting the participant, a Participant list will be prepared for each training. Listing can be done based on schedule training or without out schedule training.  \* Training can be conduct with schedule or without schedule.  \* Residential, nonresidential identification should be there.  Following notes will be added with list:   * For nonresidential training staff will get pocket allowance during training, day allowance, actual transportation cost.Participant will get 2 snacks & lunch. * For residential training staff will get accommodation, breakfast, 2 snacks, lunch, dinner. Participant has to do registration for residential facility before training dates evening.   Participant list will be approved by authorize user. |
| **9.6** | **Training invitation letter sent to participants:**  After approval of Participants List email notification will be send to selected participant. |
| **9.7** | **Training conduction as per** **Check List:**  Participant list is considered as Check List |
| **9.8** | **Training evaluation process:**  Training Result Setup: Each participant result for a specific training will be stored in database. The attributes are Pre Test, Post Test, Practical Test, Viva, Overalland remarks.   * If participants mark is below 30 than he/she has to do re training. * There will be report to view the staff list who has to attend retraining for whom previous training completion date >= 3months. * Line manager also can send request to provide retraining for a staff at any time. * For enlisting a staff to the same training there will be checkbox to select re-training during participants selection. |
| **9.9** | **Development** | **TNA from Performance Appraisal:**  During appraisal required training for a staff will be selected those training requirement will be displayed here. The scree will be search by Staff ID to have the list of TNA. |
| **9.10** | **Planned Work force development activities:**  Designation wise planning for required training will be available. User will select designation and training title with the following needs   1. Must to do 2. Need to do 3. Nice to do |
| **9.11** | **Reporting** | Report sharing to respective clinics, project offices, departments  [Please see Annex for Report Format] |
| **9.12** | **Training database to be linked with ESS & HR :**  Training related list will be displayed on ESS. |
| **9.13** | **Periodic report generation options:**  Will be available to retrieve record using date range. |

***Requirement Specification Details:***

| **SL** | **Field** | **Type** | **Data Type** | **Policy** |
| --- | --- | --- | --- | --- |
| **9.1** | **Category Setup** | | | |
| Code | Text Box | VARCHAR |  |
| Description | Text Box | VARCHAR |  |
| Make Inactive | Check Box |  |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
| Close | Button |  |  |
|  | | | | |
| 9.2 | **Training Setup** | | | |
| Code | Text Box | VARCHAR |  |
| Training ID | Text Box | VARCHAR |  |
| Training Category | Text Box | VARCHAR |  |
| Tentative Days | Text Box | VARCHAR |  |
| In House/Out Door | Text Box | VARCHAR |  |
| Medicos Y/N | Text Box | VARCHAR |  |
| Cost Per Person | Text Box | VARCHAR |  |
| Income Per Person | Text Box | VARCHAR |  |
| Designation | Text Box | VARCHAR |  |
| Period (MM) | Text Box | VARCHAR |  |
| Make Inactive | Check Box |  |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
| Close | Button |  |  |
| **Policy:**  Training type, training name, duration need to mention here. | | | | |
|  | | | | |
| **9.3** | **Training Schedule Details Setup** | | | |
| Code | Text Box | VARCHAR |  |
| MS Ref. No | Text Box | VARCHAR |  |
| DATE | Calendar | DATE |  |
| Training Name | Text Box | VARCHAR |  |
| Location Name | Text Box | VARCHAR |  |
| Start DATE | Calendar | DATE |  |
| End DATE | Calendar | DATE |  |
| Duration | Text Box | VARCHAR |  |
| No of Personnel | Text Box | VARCHAR |  |
| Course Coordinator | Text Box | VARCHAR |  |
| Fee Per Person | Text Box | VARCHAR |  |
| Income Per Person | Text Box | VARCHAR |  |
| Resident Cost | Text Box | VARCHAR |  |
| Other Income | Text Box | VARCHAR |  |
| Funded By | Text Box | VARCHAR |  |
| Funded By (Others) | Check Box |  |  |
| Status | Drop Down | VARCHAR |  |
| Start DATE | Calendar | DATE |  |
| End DATE | Calendar | DATE |  |
| Remarks | Text Area | VARCHAR |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
| Close | Button |  |  |
|  | | | | |
|  | **Training Requisition Setup** | | | |
| Req ID | Text Box | VARCHAR |  |
| MS ID | Text Box | VARCHAR |  |
| Schedule ID | Text Box | VARCHAR |  |
| DATE | Calendar | DATE |  |
| Training Name | Text Box | VARCHAR |  |
| Name of the Trainee | Text Box | VARCHAR |  |
| Designation | Text Box | VARCHAR |  |
| Location/Clinic | Text Box | VARCHAR |  |
| Project Name | Text Box | VARCHAR |  |
| Add | Button |  |  |
| Signatory 1 | Text Box | VARCHAR |  |
| Signatory 2 | Text Box | VARCHAR |  |
| Seen By | Text Box | VARCHAR |  |
| Reviewed By | Text Box | VARCHAR |  |
| Recommended By | Text Box | VARCHAR |  |
| Approved By | Text Box | VARCHAR |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
| Close | Button |  |  |
| Print | Button |  |  |
|  | | | | |
| 9.8 | **Training List Setup** | | | |
| With Schedule | Radio Button | VARCHAR |  |
| Without Schedule | Radio Button | VARCHAR |  |
| Code | Text Box | VARCHAR |  |
| Training List Ref. No | Text Box | VARCHAR |  |
| Training Name | Check Box |  |  |
| Location Name | Drop Down | VARCHAR |  |
| Start DATE | Calendar | DATE |  |
| End DATE | Calendar | DATE |  |
| Duration | Text Area | VARCHAR |  |
| No of Personnel |  |  |  |
| Cost Per Person | Text Box | VARCHAR |  |
| Income Per Person | Text Box | VARCHAR |  |
| Other Cost |  |  |  |
| Other Income |  |  |  |
| Venue |  |  |  |
| Address |  |  |  |
| DATE | Text Box | VARCHAR |  |
| Time | Text Box | VARCHAR |  |
| Organized By | Text Box | VARCHAR |  |
| Participant Name | Text Box | VARCHAR |  |
| Eligible List | Text Box | VARCHAR |  |
| Name of the Trainee | Text Box | VARCHAR |  |
| Designation | Text Box | VARCHAR |  |
| Location/Clinic | Text Box | VARCHAR |  |
| Funded By | Text Box | VARCHAR |  |
| Add | Text Box | VARCHAR |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
| Close | Button |  |  |
| Print | Button |  | Participation List  Invitation Letter  Administrative Guideline |
| Signatory 1 | Text Box | VARCHAR |  |
| Signatory 2 | Text Box | VARCHAR |  |
| Signatory 3 | Text Box | VARCHAR |  |
| Administrative Guide Line | Text Box | VARCHAR |  |
|  |  |  |  |
|  | | | | |
| 9.9 | **Training Result Setup** | | | |
| Code | Text Box | VARCHAR |  |
| Training List Ref. No | Text Box | VARCHAR |  |
| Evaluation DATE | Text Box | VARCHAR |  |
| Evaluation Method | Check Box |  |  |
| Evaluation By | Drop Down | VARCHAR |  |
| Participant Name | Calendar | DATE |  |
| Pre Test | Calendar | DATE |  |
| Post Test | Text Area | VARCHAR |  |
| Practical Test | Text Box | VARCHAR |  |
| Viva | Text Box | VARCHAR |  |
| Overall | Calendar | DATE |  |
| Remarks | Text Area | VARCHAR |  |
| Add | Text Box | VARCHAR |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
| Close | Button |  |  |
| Print | Button |  | Result Sheet  Certificate |
| Signatory 1 | Text Box | VARCHAR |  |
| Signatory 2 | Text Box | VARCHAR |  |
| Signatory 3 | Text Box | VARCHAR |  |
|  | | | | |
|  | **Other Training Details** | | | |
| Participant Name | Text Box | VARCHAR |  |
| Designation | Text Box | VARCHAR |  |
| Dept./Clinic | Text Box | VARCHAR |  |
| Training Name | Text Box | VARCHAR |  |
| Start DATE | Text Box | VARCHAR |  |
| End DATE | Text Box | VARCHAR |  |
| Duration | Text Box | VARCHAR |  |
| Organized By | Text Box | VARCHAR |  |
| Certificate Y/N | Text Box | VARCHAR |  |
| Remarks | Text Box | VARCHAR |  |
| Add | Text Box | VARCHAR |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
| Close | Button |  |  |
|  | **Training Schedule Summary Setup** | | | |
| Code | Text Box | VARCHAR |  |
| MS Ref. No | Text Box | VARCHAR |  |
| DATE | Calendar | DATE |  |
| To | Multiple Selection | VARCHAR |  |
| From | Multiple Selection | VARCHAR |  |
| Subject | Multiple Selection | VARCHAR |  |
| Cc | Multiple Selection | VARCHAR |  |
| Attached | Multiple Selection | VARCHAR |  |
| Send Req. With in | Calendar | DATE |  |
| Training Name | Text Box | VARCHAR |  |
| Start Date | Date |  |  |
| End Date | Date |  |  |
| Add | Button |  |  |
| Refresh | Button |  |  |
| Save | Button |  |  |
| Delete | Button |  |  |
| Close | Button |  |  |
|  | | | | |
| 9.13 | **Training Report** | | | |
| Employee Name | Text Box | VARCHAR |  |
| All Training | Radio Button |  |  |
| Particular Training | Radio Button |  |  |
| Training ID | Text Box | VARCHAR |  |
| DATEs | Drop Down | VARCHAR |  |
| From | Calendar | DATE |  |
| To | Calendar | DATE |  |
| View | Button |  |  |
| Exit | Button |  |  |
| Preview | Button |  |  |
|  | | | | |
| 9.13 | **Schedule Report** | | | |
| Particular Schedule | Radio Button |  |  |
| DATE Range | Radio Button |  |  |
| Schedule ID | Text Box | VARCHAR |  |
| Date | Drop Down | VARCHAR |  |
| From | Calendar | DATE |  |
| To | Calendar | DATE |  |
| View | Button |  |  |
| Exit | Button |  |  |
| Preview | Button |  |  |
|  | | | | |
| 9.13 | **Training Report** | | | |
| All Training | Text Box | VARCHAR |  |
| Particular Training | Text Box | VARCHAR |  |
| Training ID | Text Box | VARCHAR |  |
| Summery | Text Box | VARCHAR |  |
| Details | Text Box | VARCHAR |  |
| Date | Drop Down | DATE |  |
| From | Drop Down |  |  |
| To | Drop Down |  |  |
| View | Button |  |  |
| Exit | Button |  |  |
| Preview | Button |  |  |
|  | | | | |
| 9.13 | **Clinic/Dept. Wise Training Report** | | | |
| Clinic/Dept. Name | Text Box | VARCHAR |  |
| All Training | Radio Button |  |  |
| Particular Training | Radio Button |  |  |
| Training ID | Text Box | VARCHAR |  |
| Date | Drop Down | DATE |  |
| From | Drop Down |  |  |
| To | Drop Down |  |  |
| View | Calendar | DATE |  |
| Exit | Button |  |  |
| Preview | Button |  |  |
|  | | | | |
| 9.13 | **Employee Eligible Training Report** | | | |
| Clinic/Dept. Name | Text Box | VARCHAR |  |
| Employee Name | Text Box | VARCHAR |  |
| All Training | Radio Button |  |  |
| Particular Training | Radio Button |  |  |
| Training ID | Text Box | VARCHAR |  |
| View | Button |  |  |
| Exit | Button |  |  |
| Preview | Button |  |  |
|  | | | | |
| 9.13 | **Employee Eligible Training Report** | | | |
| Clinic/Dept. Name | Text Box | VARCHAR |  |
| Employee Name | Text Box | VARCHAR |  |
| All Training | Radio Button |  |  |
| Particular Training | Radio Button |  |  |
| View | Button |  |  |
| Exit | Button |  |  |
| Preview | Button |  |  |
|  | | | | |
| 9.13 | **Other Reports** | | | |
| * Report sharing to respective clinics, project offices, departments * Periodic report generation options * Clinic wise training list * Schedule wise training list * Project wise training list * Training criteria wise training list | | | |

**Reports**

|  |  |
| --- | --- |
| **SL** | **Report Name** |
| 1. **HRIS Application** | |
|  | * Promotion History. * Separated Employee Info. * Service Agreement. * Service Length and Retirement as per Date of Birth. * Service Length and Retirement as per Joining date. * Service Length as Separation Date wise. * Transfer Report. * Employee Nominee Information. * Employee List. * Employee List for NGO Bureau (Monthly & Yearly with Salary details). * Employee Service Length (Active). * Employee Emergency Contact. * Employee Experience Information. * Employee ID card and Blood Group Information. * Employee List with Supervisor Name. * Employee List with Address. * Employee Education Information. * Employee Resume/CV. |
| 1. **Leave & Time Management Reports** | |
|  | * Time Sheet. * Employee Leave Balance. * Employee Leave Details. * Leave Type Wise Balance. * Leave Type wise List. |
| 1. **Performance Appraisal Reports** | |
|  | * Appraisal Eligibility List  |  |  | | --- | --- | |  | * Department Wise Appraisal Details |  * Appraisal Status |
| 1. **Payroll Reports** | |
|  | * Grade Wise Employee Salary Details. * Grade Wise Salary Information. * Gratuity Summary. * Income Tax Plan. * Income Tax Computation. * Income Tax Deduction. * Increment Certificate. * Bonus Pay slip. * Salary Pay Slip. * Salary Reconciliation. * Salary Reconciliation Details. * Salary Sheet Employee Wise. * Salary Sheet Summary. * Salary Statement. * Salary Certificate. * Over Time Calculation. * Gratuity Reports * Yearly PF Contribution. * Individual PF Contribution. * PF Loan Deduction. * Final Payment list. |
| 1. **User Report** | |
|  | * User Transaction Log * User In/Out Log |

***3.4 UI Design***

Software GUI (Graphical User Interface) is an integral part of this SRS. As GUI design will be continued in Design phase BASE will design the GUI periodically as mentioned in the Work Plan documents. After the GUI design and general functionality development the GUI will be reviewed by the concern MSB personnel and give feedback within 3 working days if any change or modification needed. After GUI submission and any modification done then it will be attached with this SRS as annexure.

***3.5 Security***

All the record will be secured MSB Head Office. An authenticated user from an office will not be allowed to view another office record. Only the user as globally permitted can view any information. Each operation in this software will be button based. For each type operation user must have permission before he submits any record.

***3.6 Requirement Extendibility***

New requirements which are not listed in the SRS will proceed with negotiation by MSB & BASE and as per the mutual understanding of both parties it will be amend to the SRS as an annexure.

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