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Introduction

This is a post installation guide to provide users information on how to use HRMS easily.

This guide comprises of a detailed description of HRMS features, capabilities, and step-by-step procedures to use this application efficiently.

Prerequisite Skills

HRMS end users do not require any specialized or additional technical skills to use the application.

How to Use This Guide

We would recommend you to follow this guide in a sequential order of the chapters. The chapters have been placed in a progressive order to help you to use HRMS optimally. HRMS 3.0 User Guide’s chapters consist of ‘How to’ questions to make it easier for users to locate solutions for their queries. Following are some of the frequently used conventions across the user guide:

Convention/Icon	Description
	Tip icon used in this document to highlight easy to use tips, to simplify your HRMS experience.
	Note icon used in this document to highlight important points.
	View icon used in HRMS application
	Edit icon used in HRMS application
	Delete icon used in HRMS application
	More actions icon used in HRMS application
	Information icon used in HRMS application. Hover the mouse pointer over this icon to view a brief description for an option
	Enable/Edit/View Questions icon used in HRMS application.

1. Getting Started

1.1 What are the roles available in HRMS?

1.1.1 Super Admin

Super Admin installs the application and provides his email credentials while installing. He/she is responsible for setting up and configuring the application to make it ready for use. The Super Admin will be the first employee in the application, for example: EMP0001 or SENT0001. However in HRMS, the Super Admin will not be included in the organization's employees' list. The employees' list starts from the second employee (Organization Head).

The Super Admin has unlimited access over the entire application. In other words, he/she has full control, and is responsible for administering HRMS.

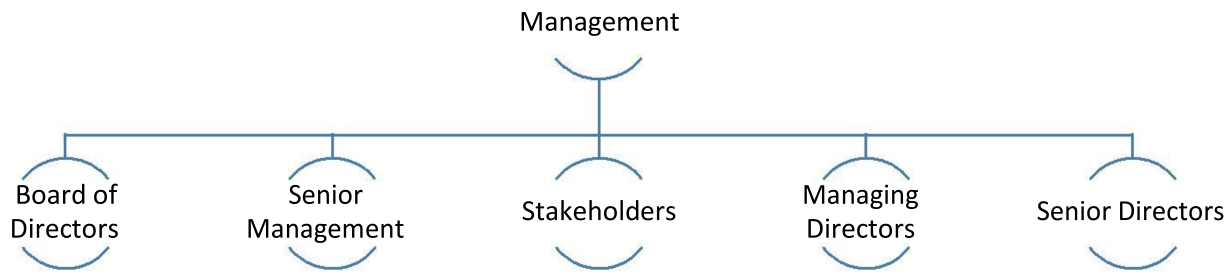
Since the Super Admin will not be included in the employee's list, he/she will not be Able to perform employee actions like raising a leave request, service request, submitting timesheets etc. You can add another employee to HRMS for the Super Admin user, with his/her actual details like Name, Job Title, Reporting Manager etc.

1.1.2 Default Role Groups in HRMS

There are 6 main role groups available by default in HRMS:

- Management
- Manager
- HR
- Employee
- System Admin
- External User

Within each role group a maximum of 5 role groups can be created. For example:



1.2 How do I log in to HRMS?

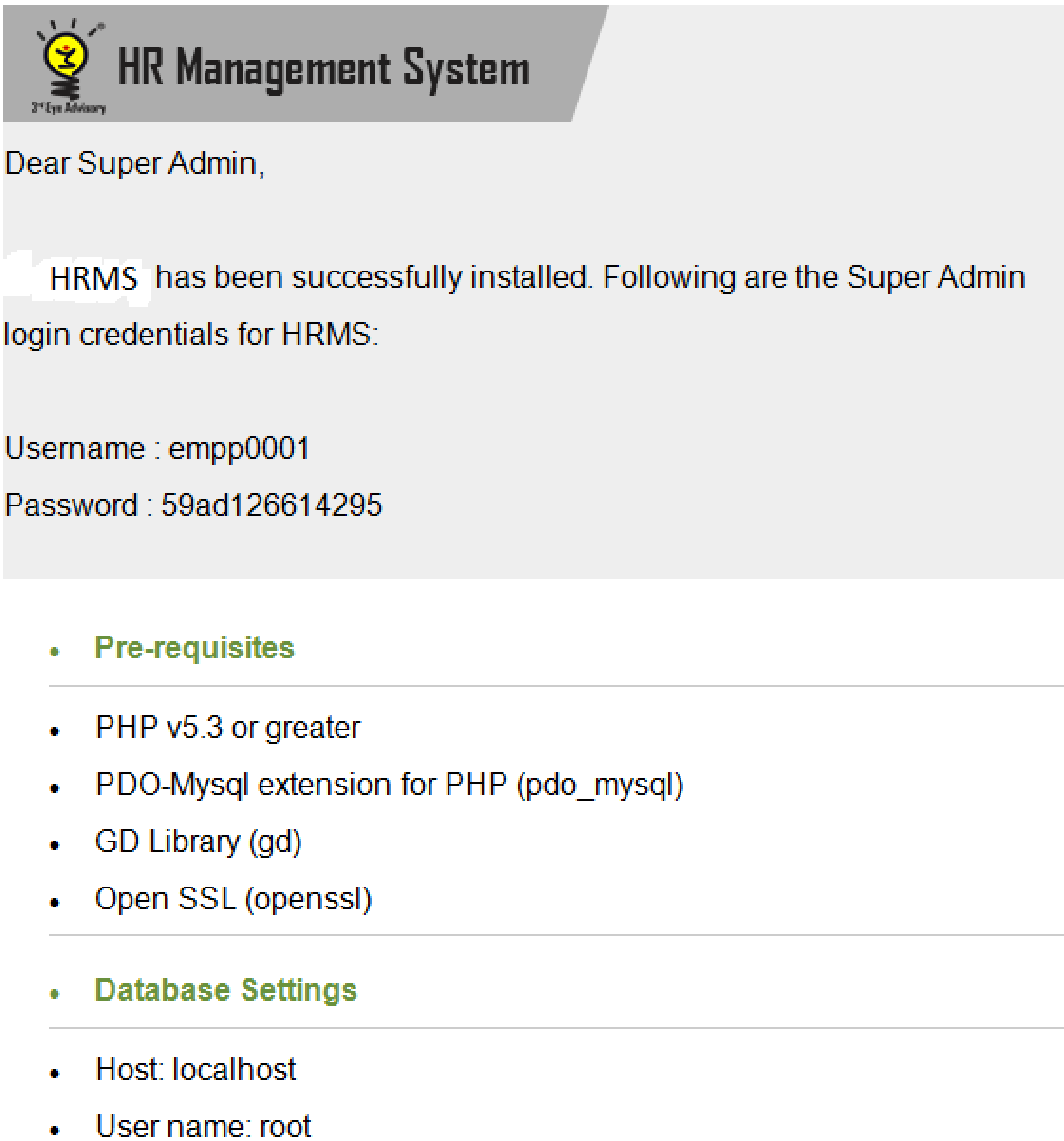
1.2.1 Super Admin

After installing HRMS your (Super Admin) credentials will be sent to your email address and will also be available in a downloadable PDF file. To access the application follow the link provided on the screen after installation.

a. Super Admin login credentials
b. Follow this link to open the application
c. Download PDF file containing login credentials

Super Admin receives the below email:

Please refer Figure 2.



HR Management System

Dear Super Admin,

HRMS has been successfully installed. Following are the Super Admin login credentials for HRMS:

Username : empp0001

Password : 59ad126614295

- **Pre-requisites**

- PHP v5.3 or greater
- PDO-Mysql extension for PHP (pdo_mysql)
- GD Library (gd)
- Open SSL (openssl)

- **Database Settings**

- Host: localhost
- User name: root

1.2.2 Employees/Users

After the HR/Management/Super Admin adds you to HRMS, your credentials will be sent to your provided email address. You can access the application through the **link** provided in the email containing your credentials.

Please refer Figure 3.

Greetings from HRMS

Hello Abhishek Agrawal,

You have been added to HRMS. The login credentials for your HRMS. account are:

Username: **EMPP004**

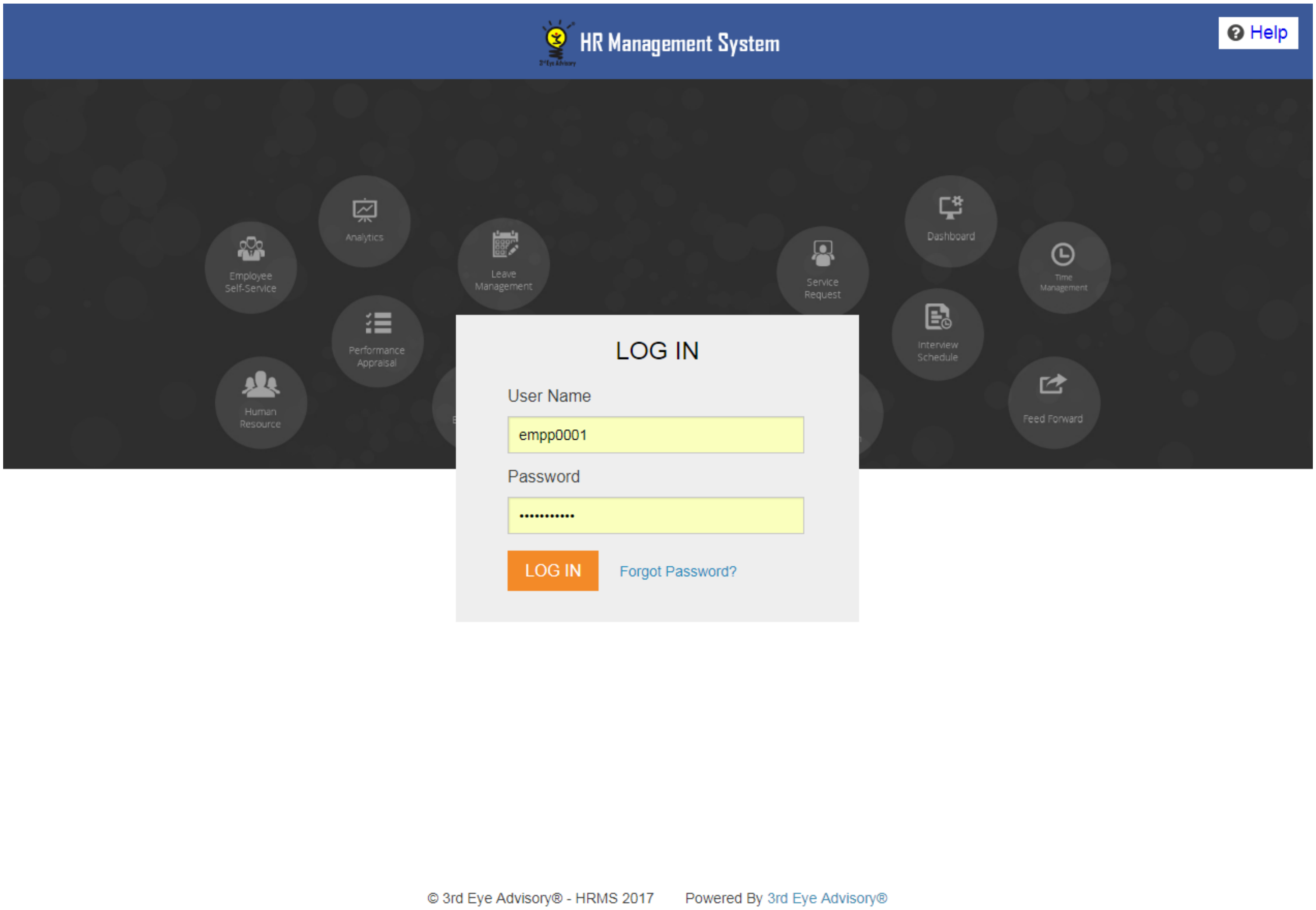
Password: **vybesyvej**

Please click here to login to your HRMS. account.

Regards,

HRMS

The **link** leads you to the HRMS login screen. You can log in using your employee ID or your registered email address.



1.3 How do I set up HRMS?

The Super Admin can begin setting up HRMS by using the Configuration Wizard.

1.3.1 Configuration Wizard

Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use. Configuration Wizard is the first screen that is displayed if you are logging into the application for the first time.

Information is gathered in 5 steps.

Step 1: Modules

Please refer Figure 4.

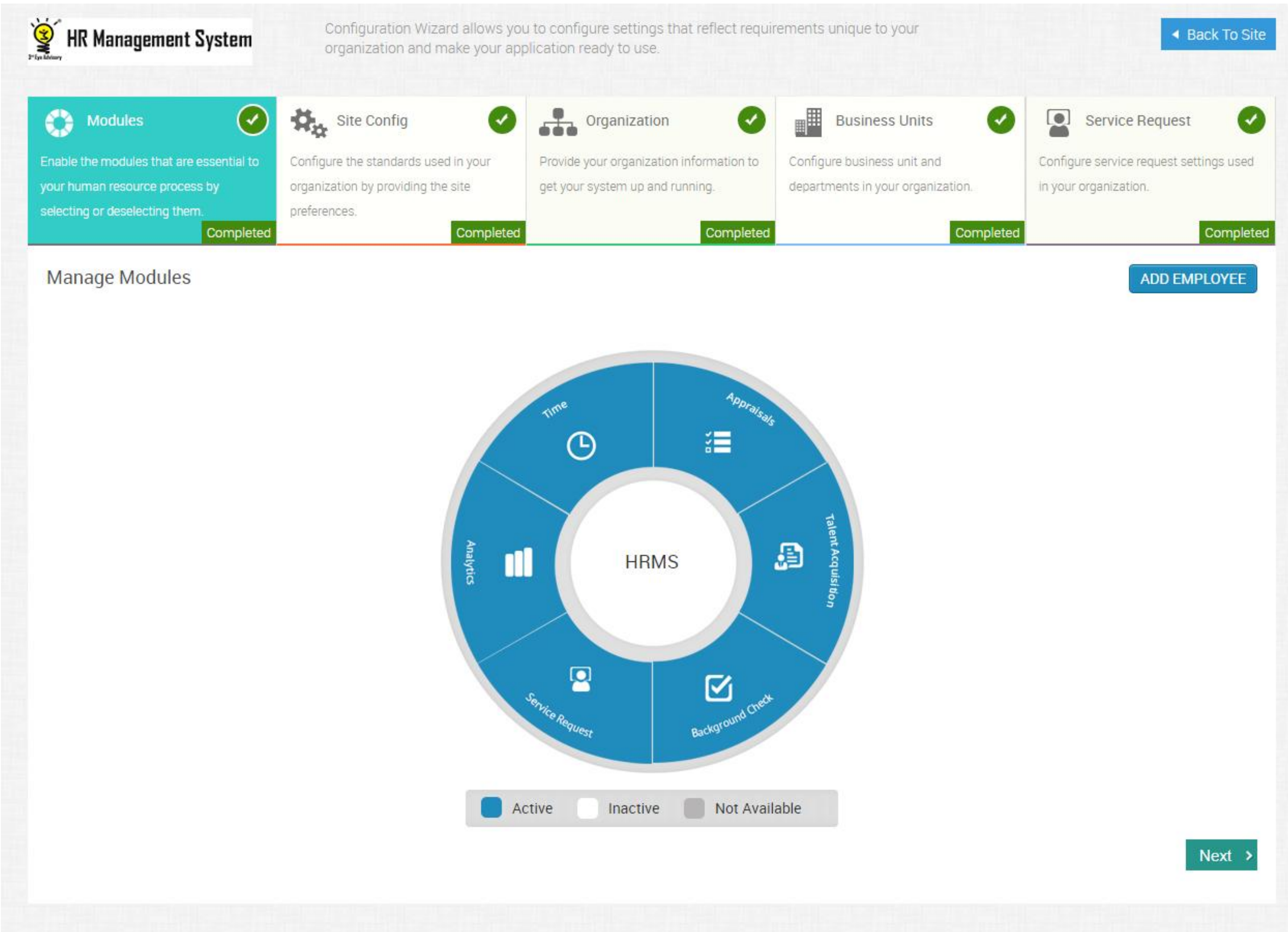


Figure 4

a. All the modules are displayed in a circular representation
b. Click on a module icon to activate or inactivate a module
c. Click **SAVE** button to apply the changes made
d. Click **Next** button to proceed to the next step
e. Click **Configure Later** and you will be redirected to the dashboard and you can complete the Configuration as per your convenience
f. Click **Back To Site** button and you will be redirected to the dashboard. The next time you log in, it will resume from where you had discontinued earlier in the configuration wizard.

Step 2: Site Config

Please refer Figure 5.

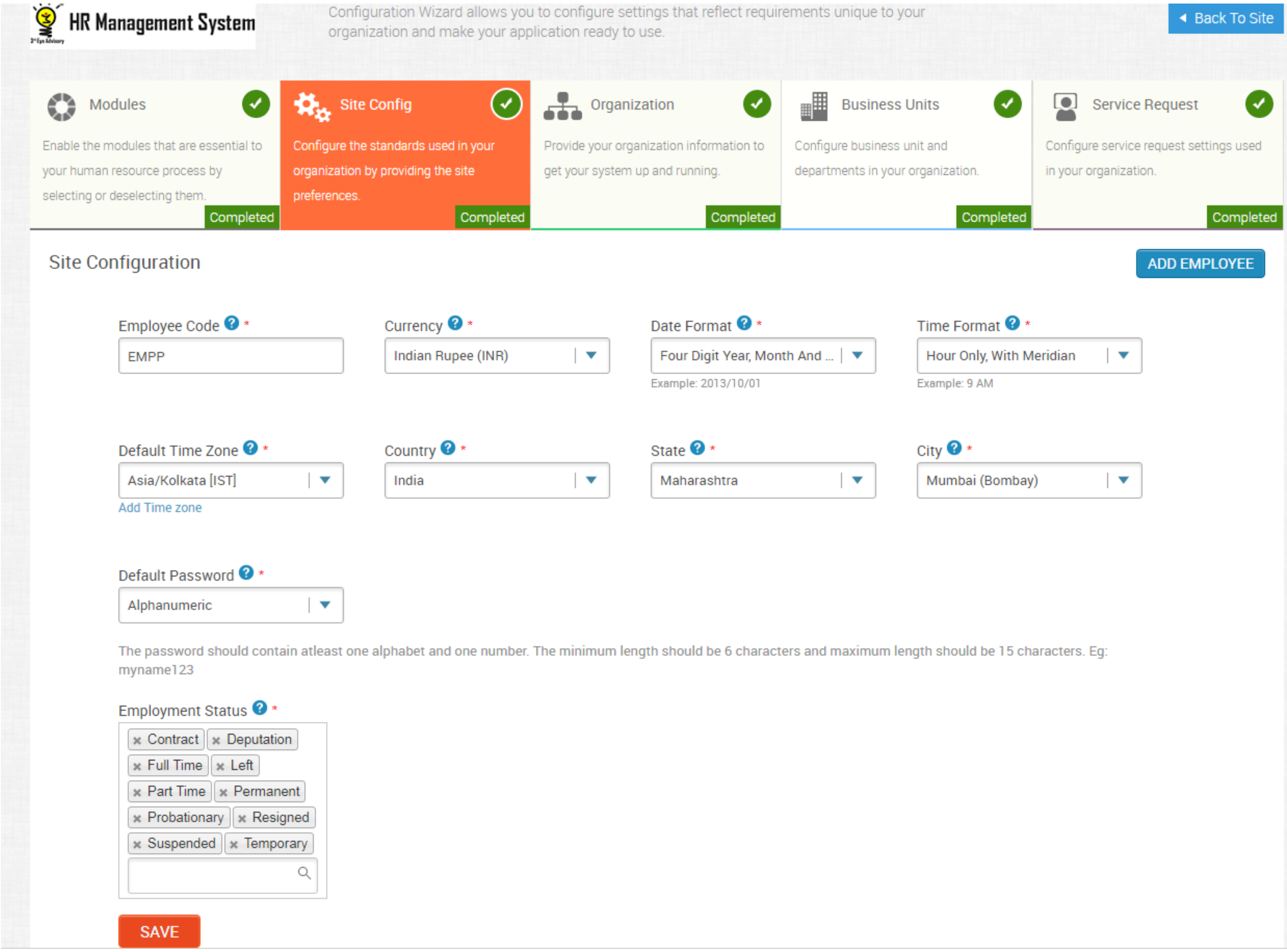


Figure 5

g. Make changes to the Site Configurations based on your organization preferences
h. Click **Add Time Zone** to add the required time zone

When you click **Add time Zone** another window will pop up which will let you select the time zone(s) you require in your organization.

Step 3: Organization

Please refer Figure 6.

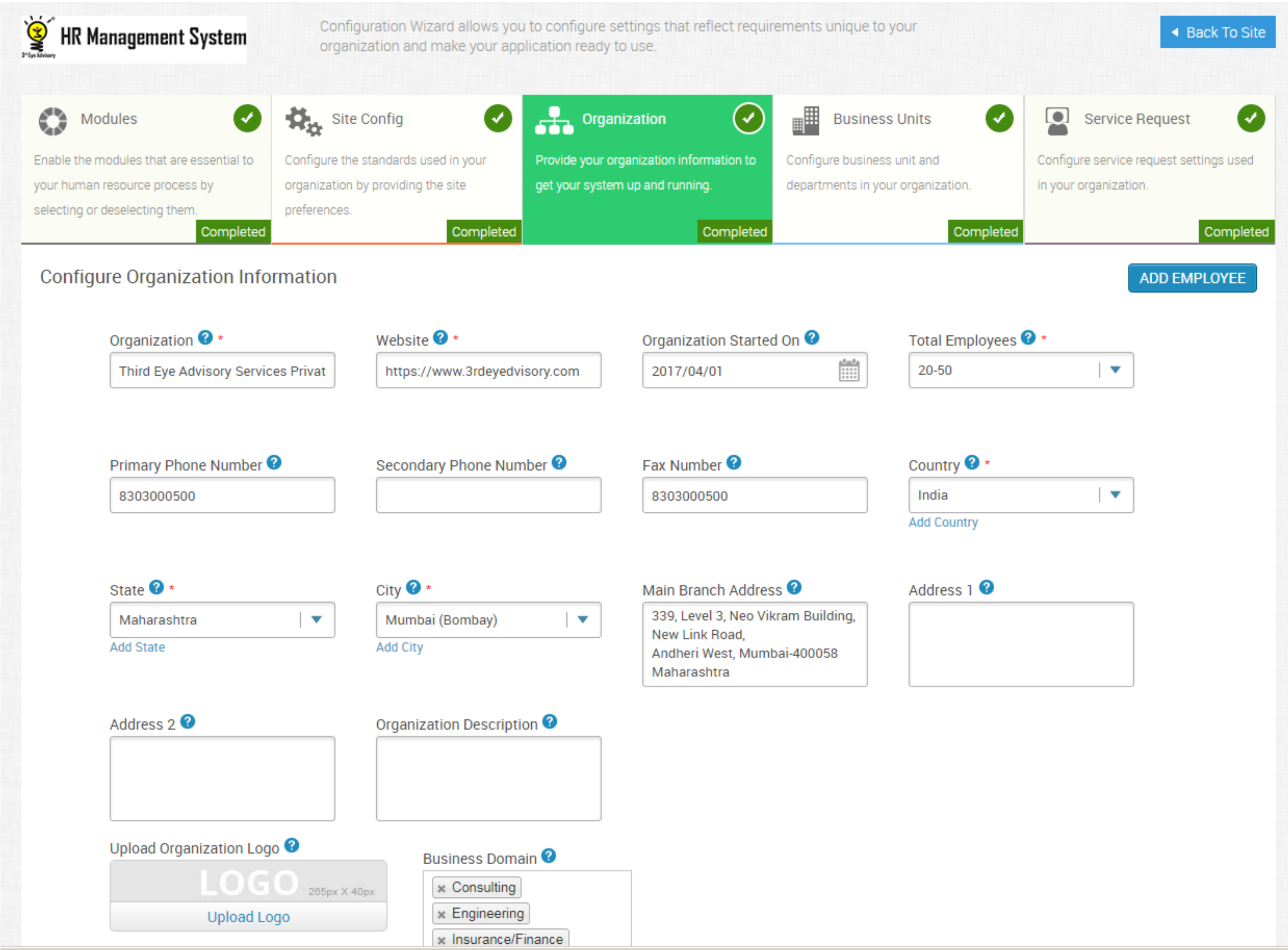


Figure 6

i. Click **Add Country** to add the required country
j. Click **Add State** to add the required state
k. Click **Add City** to add the required city
l. Enter information about your organization

After saving your organization's details, an **ADD Employee** button will appear on the top right corner of the configuration wizard screen. However, it is not mandatory to add an employee in this step, you can even add an employee after the entire configuration is completed.

If you want to add an employee please refer to section 1.4 How do I add employees to HRMS?

Step 4: Business Units

You can create business units and departments here.

Please refer Figure 7.

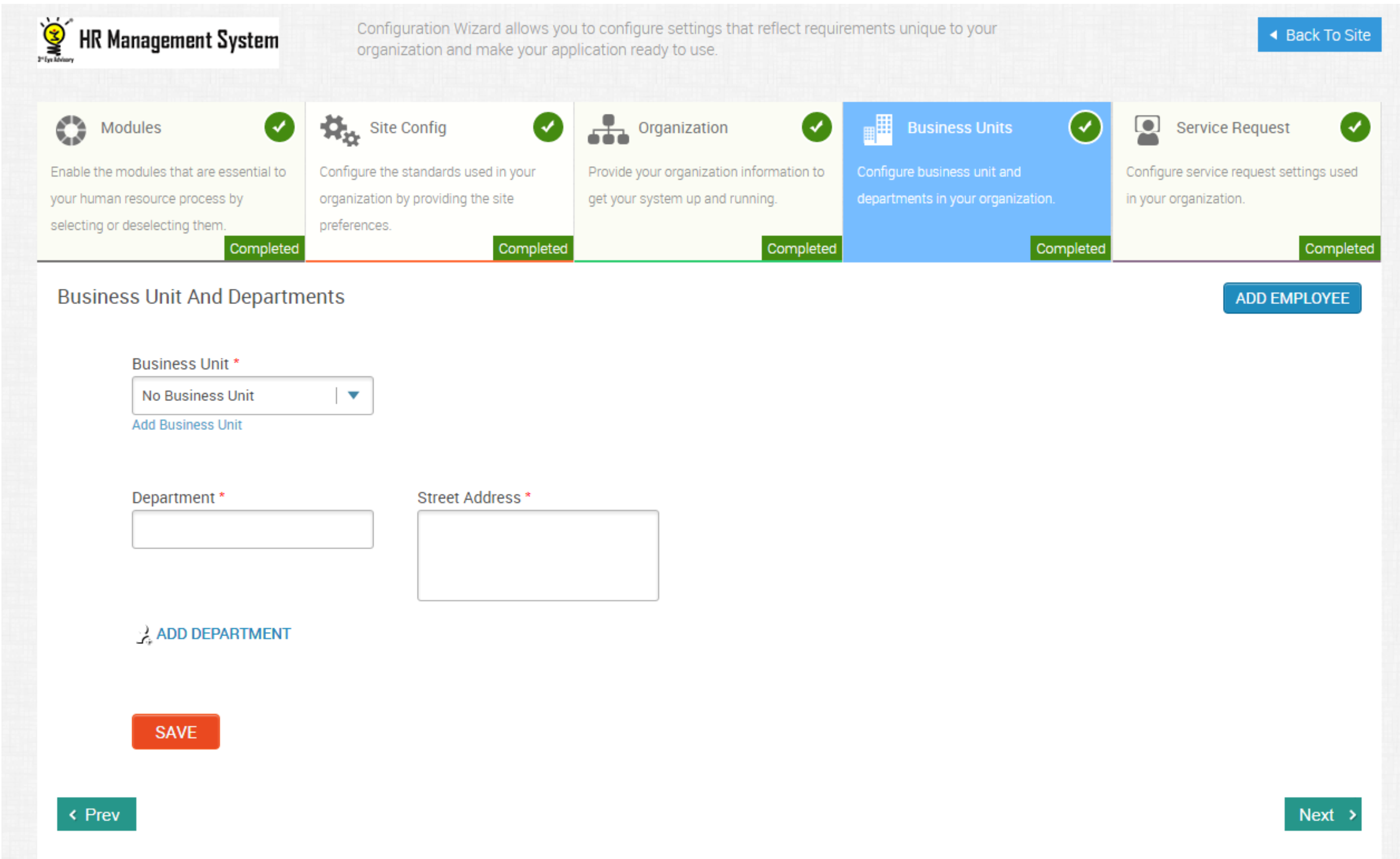
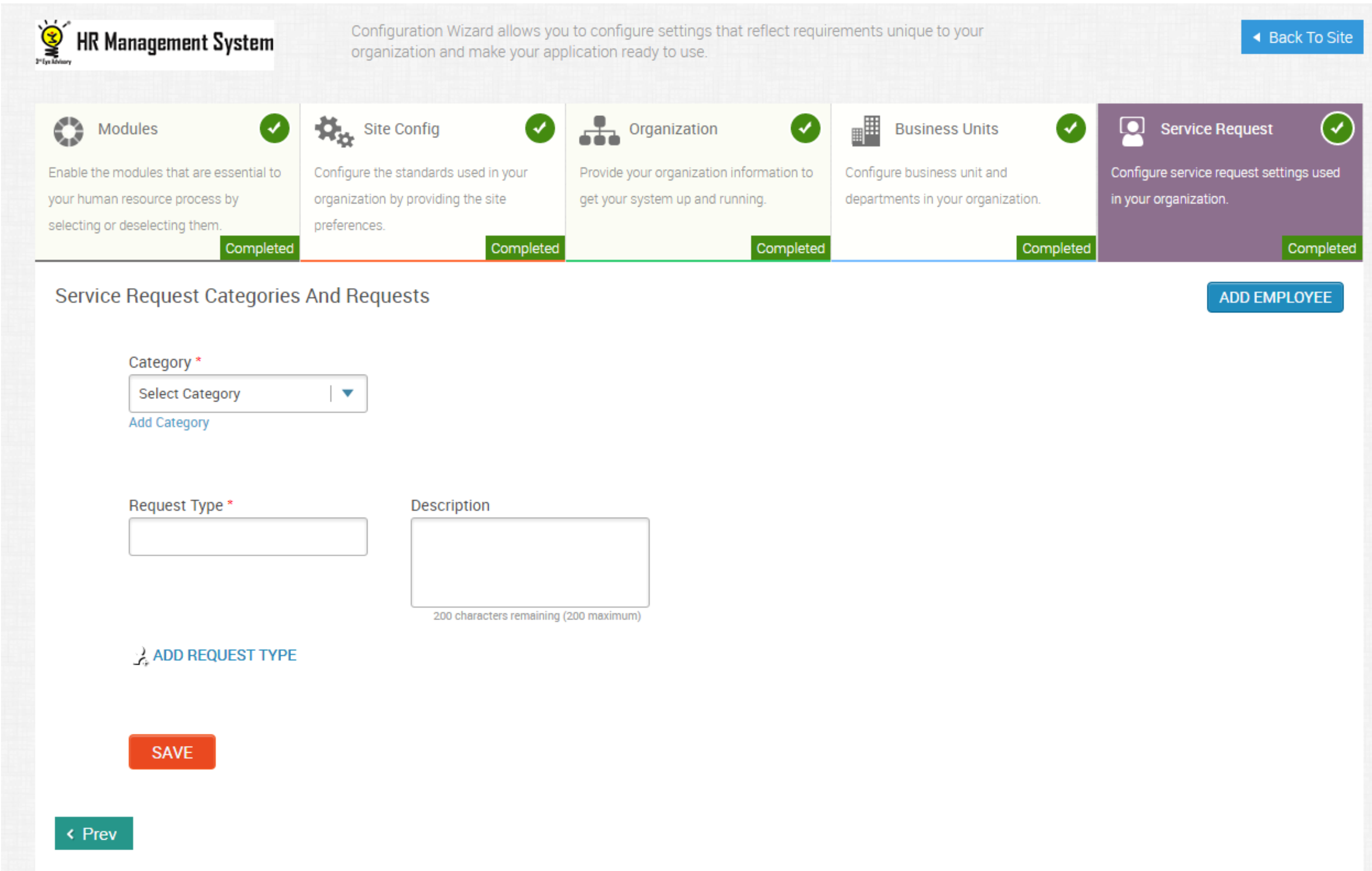


Figure 7

m. Create a new business unit by giving its name and street address.
n. Create a new department within the business unit
o. Add another department (To have multiple departments under a business unit)
p. Click here to add the first employee (organization head)

Step 5: Service Request



Please refer Figure 8.

Figure 8

q. Create a new service category
r. Create a new request type
s. Add another request type

Click **Back To site** to go back to the application's dashboard and exit the configuration wizard.

Ensure that you always SAVE after entering details in each section of the Configuration Wizard and only then proceed.

1.4 How do I add Employees to HRMS?

Gathering management details is an important aspect of an organization. The first employee you add will be the Organization Head.

You can add other employees only after adding the Organization Head.

While adding employees ensure that they align with the hierarchy of your Organization (top down approach). Reporting manager is a mandatory field, While adding employees.

1.4.1 Adding Organization Head (Employee #2)

On clicking ADD EMPLOYEE in the configuration wizard screen (*refer Figure 8*) the below screen will appear:

Please refer Figure 9.s

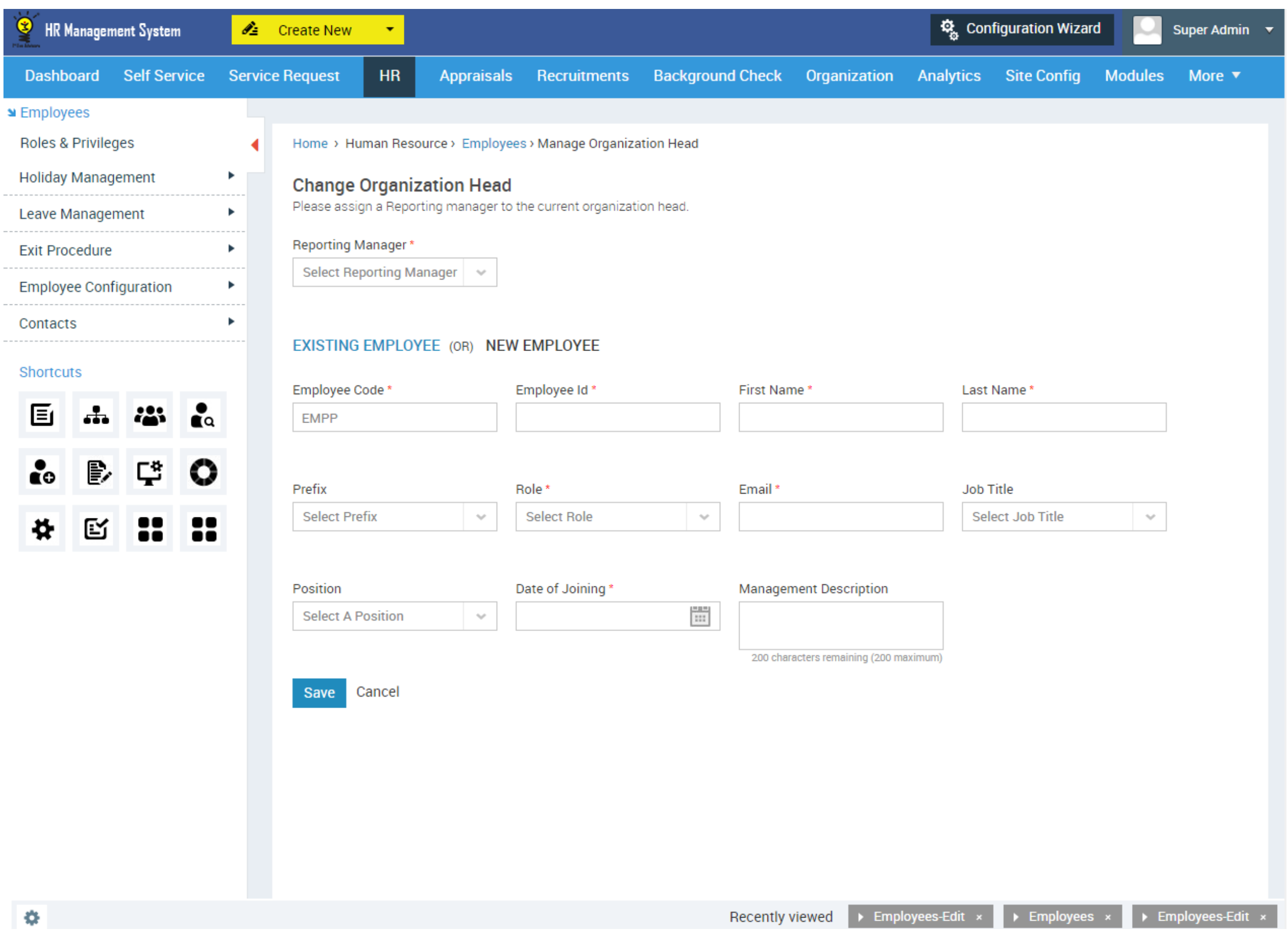


Figure 9

a. Enter the all the mandatory details
b. Position can be configured later
c. Job title can be configured later
d. Go back to the configuration wizard and resume configuring your application

1.4.2 Adding Other Employees

Please refer Figure 10.

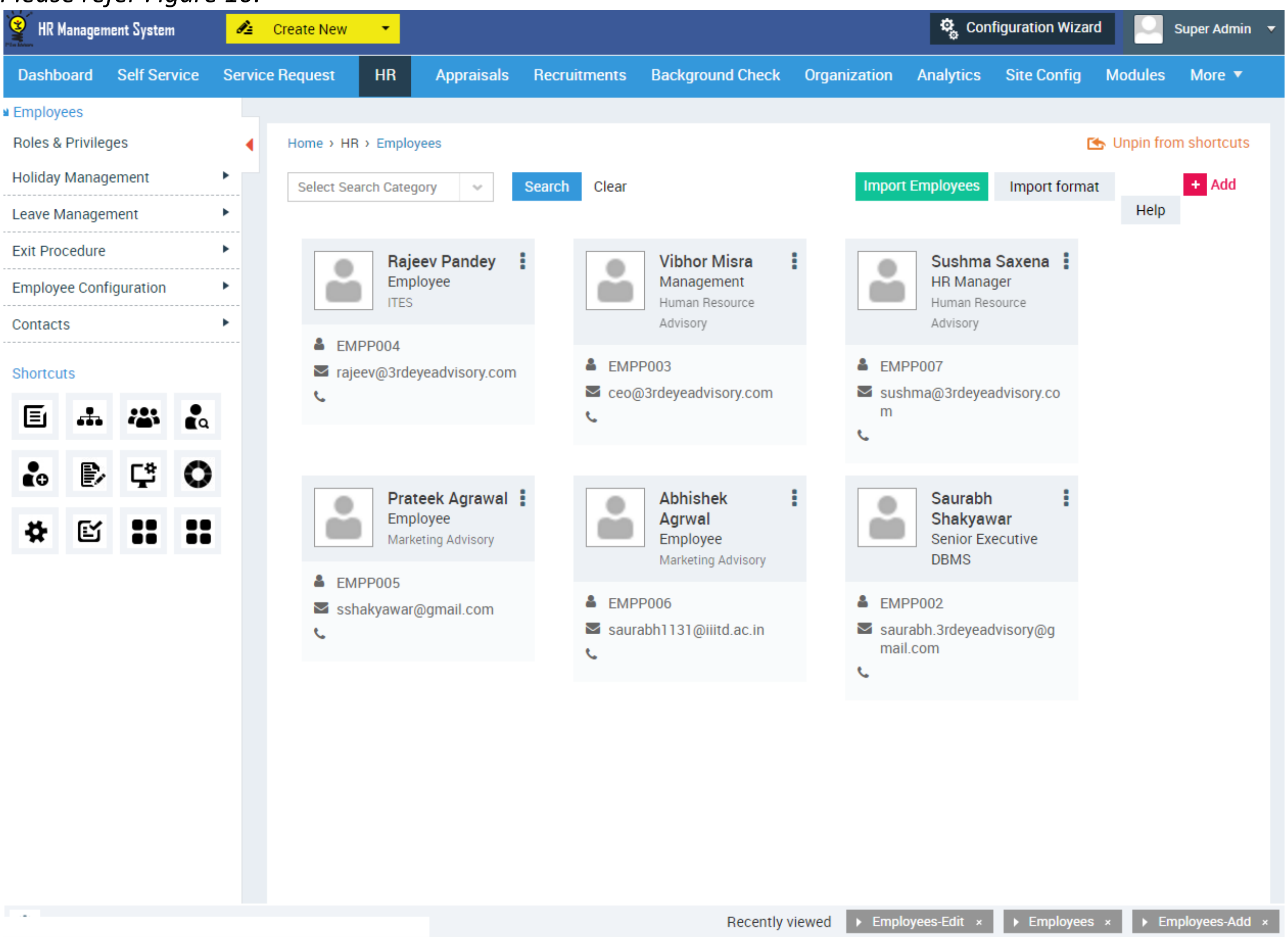


Figure 10

a. Click **HR** in the top menu
b. Click **+Add** button on the right side

Please refer Figure 11.

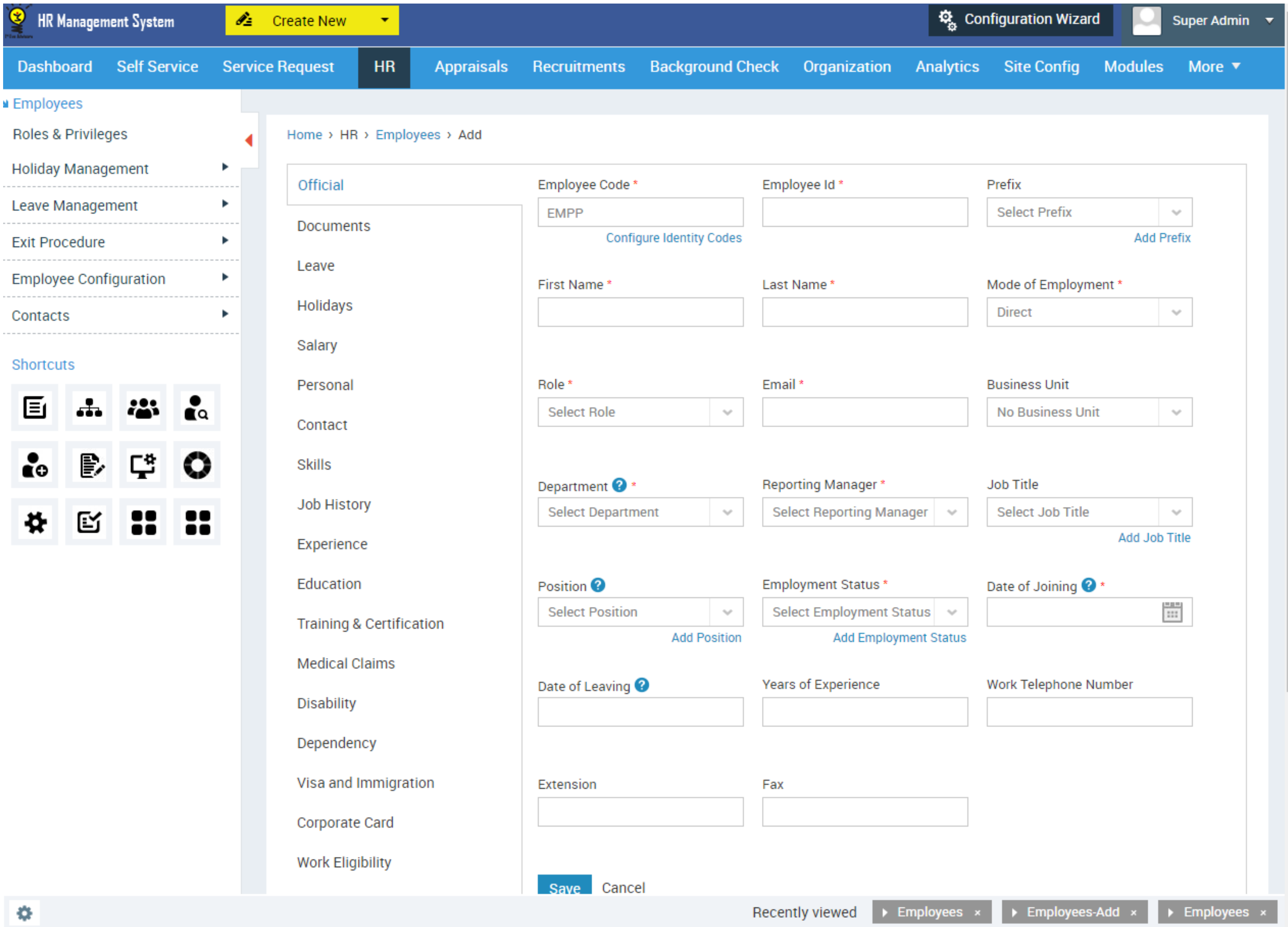


Figure 11

c. The letters in the employee code (configured in Site Config step) will appear by default. You will need to enter the Employee ID manually.
d. Enter the required details related to the employee
e. Click **Save** button to add the employee

> Only the Super Admin's ID number will be fixed as 0001. All the other Employees including the Organization Head can have customized employee ID numbers. For example:
>
> Super Admin: EMP0001
> Organization Head: EMP0022
> Manager: EMP345
> Employee: EMP90

1.4.3 Adding Employees in Bulk

Employees can be added in bulk using the import option. You have to download the import format excel doc, fill it in with all the employees' details and then import it.

Please refer Figure 12.

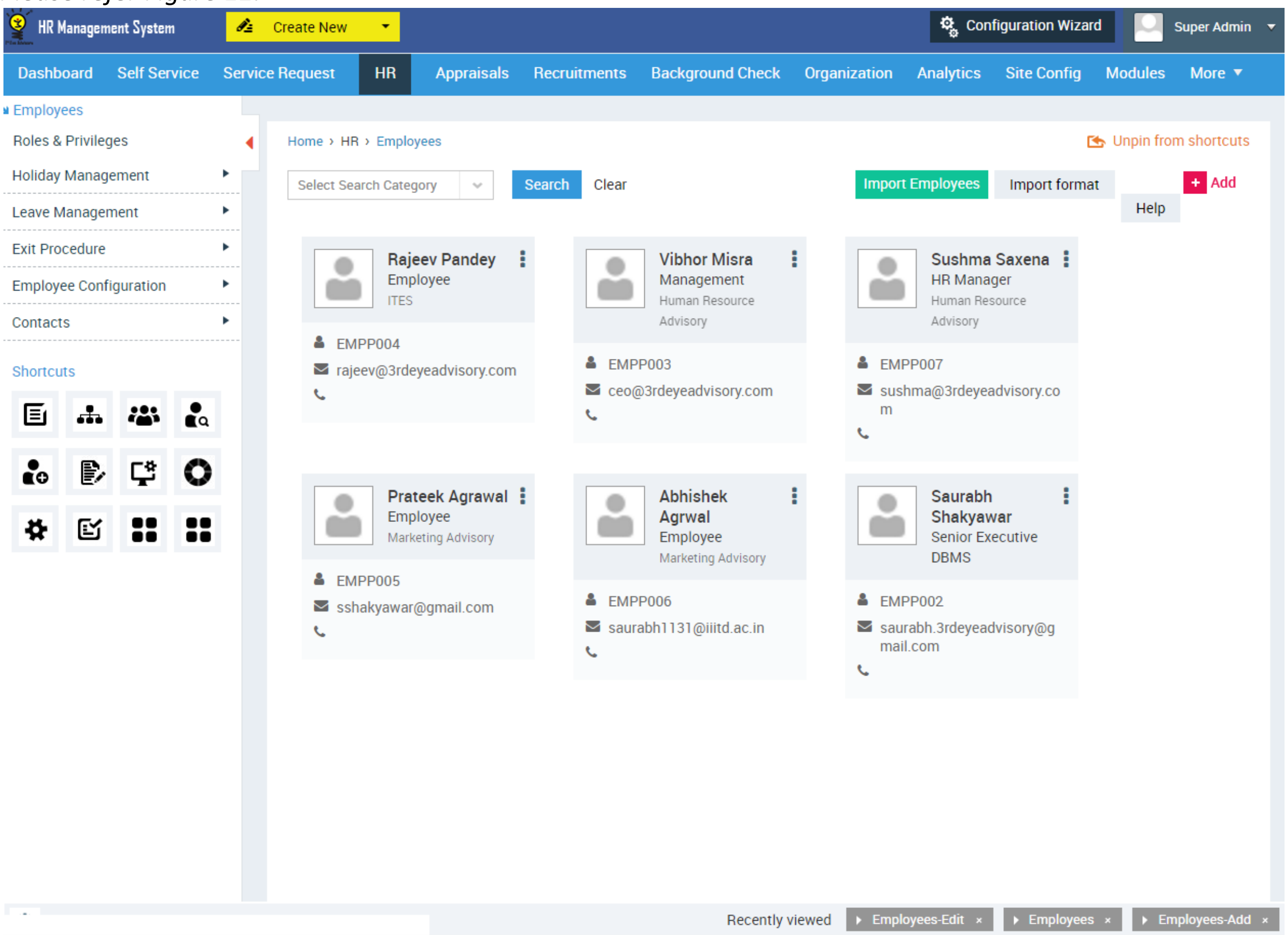


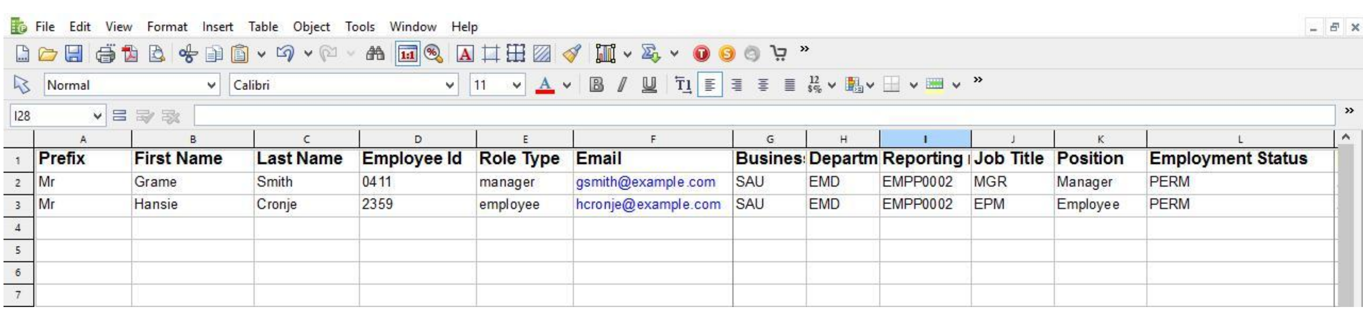
Figure 12

a. Click **HR** in the top menu

b. Click **Import Format** on the right side above the Employees grid to download the format

c. For further guidance, click on the **Help** link. You will be directed to the import guide, which will provide you detailed information on how to add employee in bulk.

Please refer Figure 13 to view the Import Format.



Prefix	First Name	Last Name	Employee Id	Role Type	Email	Busines	Departm	Reporting	Job Title	Position	Employment Status
Mr	Grame	Smith	0411	manager	gsmith@example.com	SAU	EMD	EMPP0002	MGR	Manager	PERM
Mr	Hansie	Cronje	2359	employee	hcronje@example.com	SAU	EMD	EMPP0002	EPM	Employee	PERM

Figure 13

In bulk import, emails containing the credentials will not be sent automatically to the employees. The employee data will only be saved in the database. In order to send emails, you will need to run the cron job:

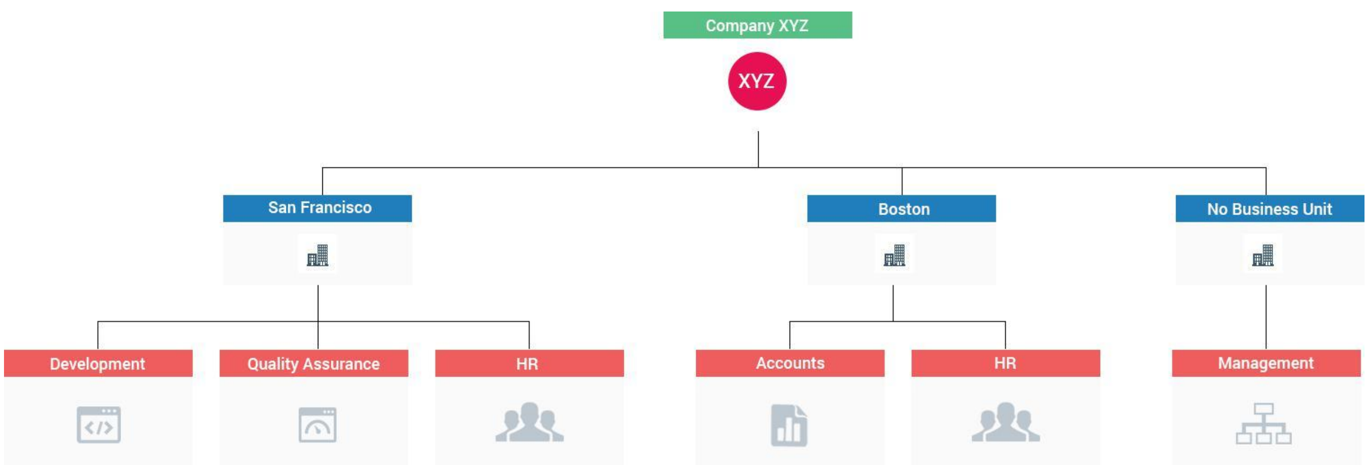
http://..(your domain name)../..(your application name)../index.php/cronjob

For example: http://example.com/HRMS/index.php/cronjob

Please logout of the application and then run the cron job in your browser.

1.5 How do I add Business Units and Departments (without using configuration wizard)?

Business Units and Departments are the two main organizational units of HRMS. A Business Unit can have multiple departments and not vice versa. Below is an example of the Organization Structure in HRMS.



1.5.1 Adding Business Units

Please refer Figure 14.

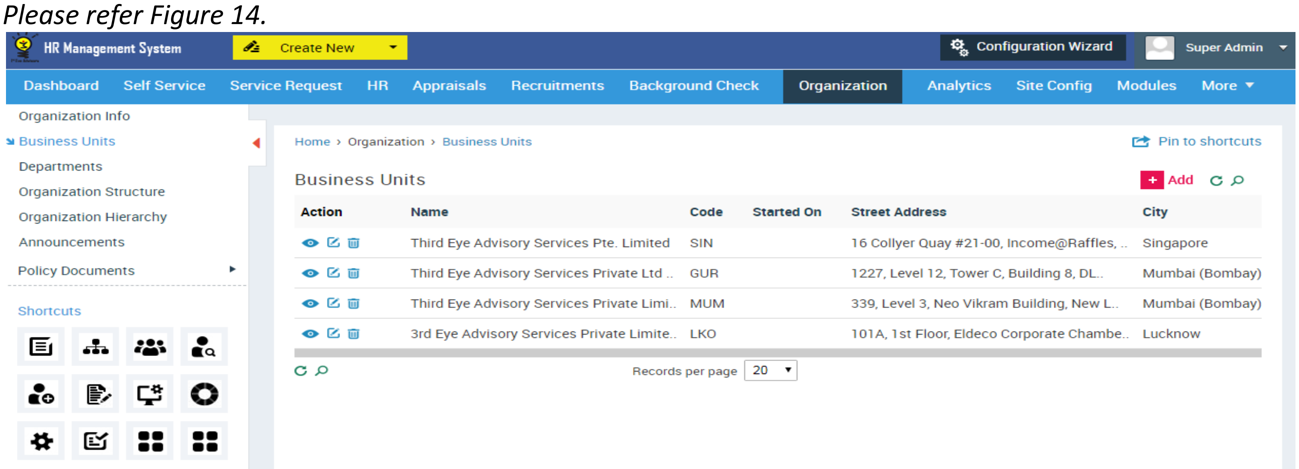


Figure 14

a. Click **Organization** in the top menu
b. Click on **Business Units** on the left panel
c. Click on **+Add** button on the right side

Please refer Figure 15.

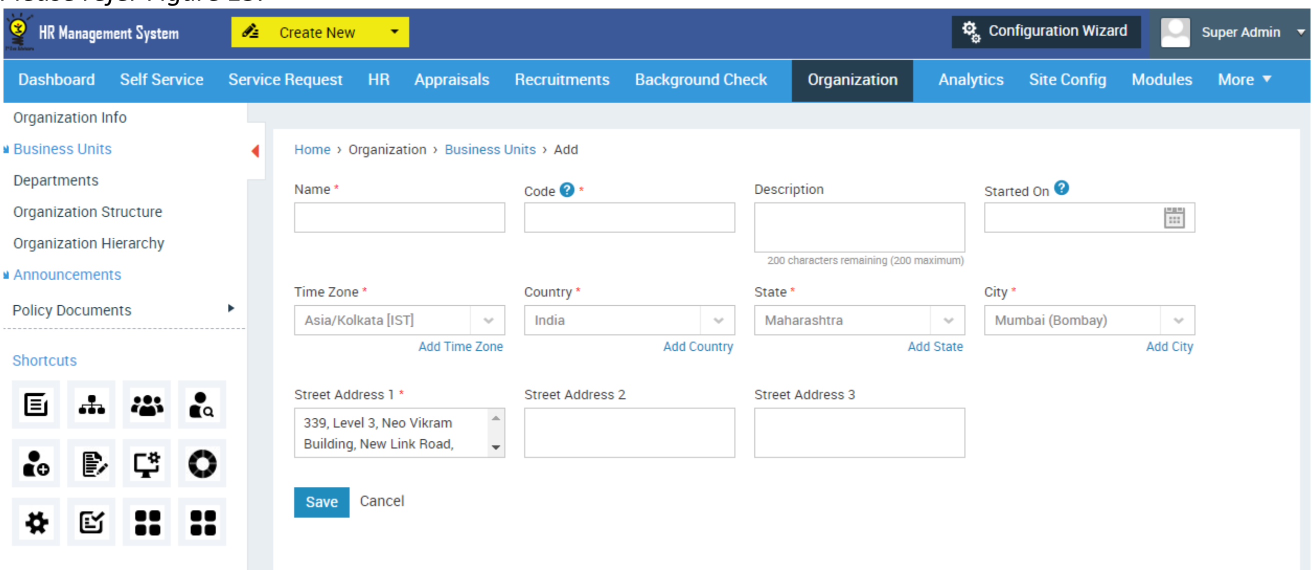


Figure 15

d. Enter the necessary details
e. Click on Save button to save the Business Unit

1.5.2 Adding Departments

Please refer Figure 16.

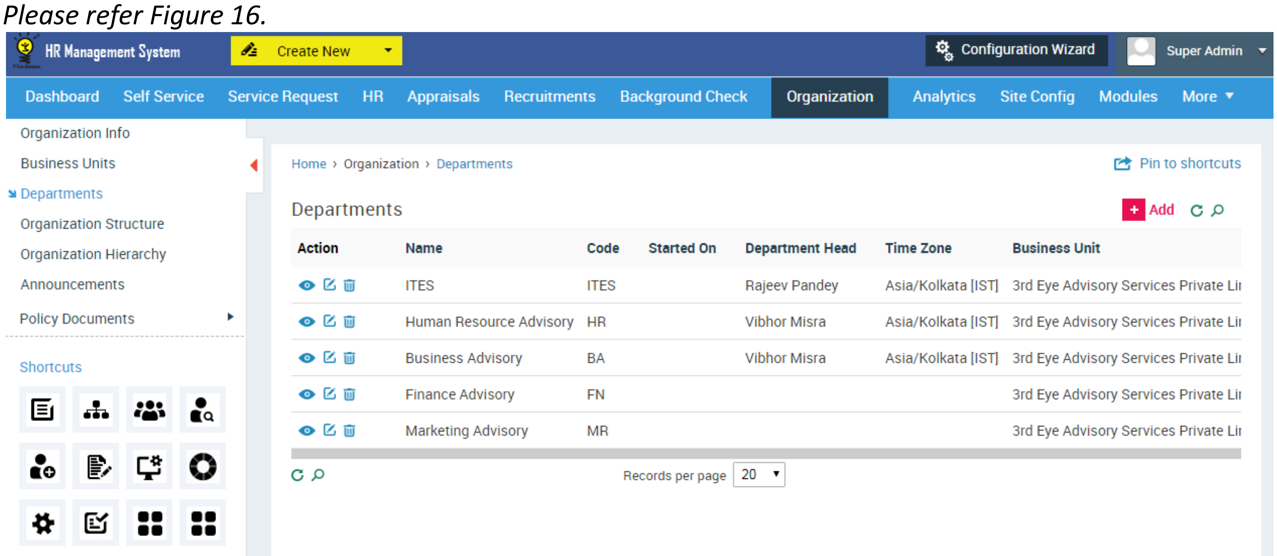


Figure 16

a. Click **Organization** in the top menu
b. Click on **Departments** on the left menu panel
c. Click on **+Add** button on the right side

Please refer Figure 17.

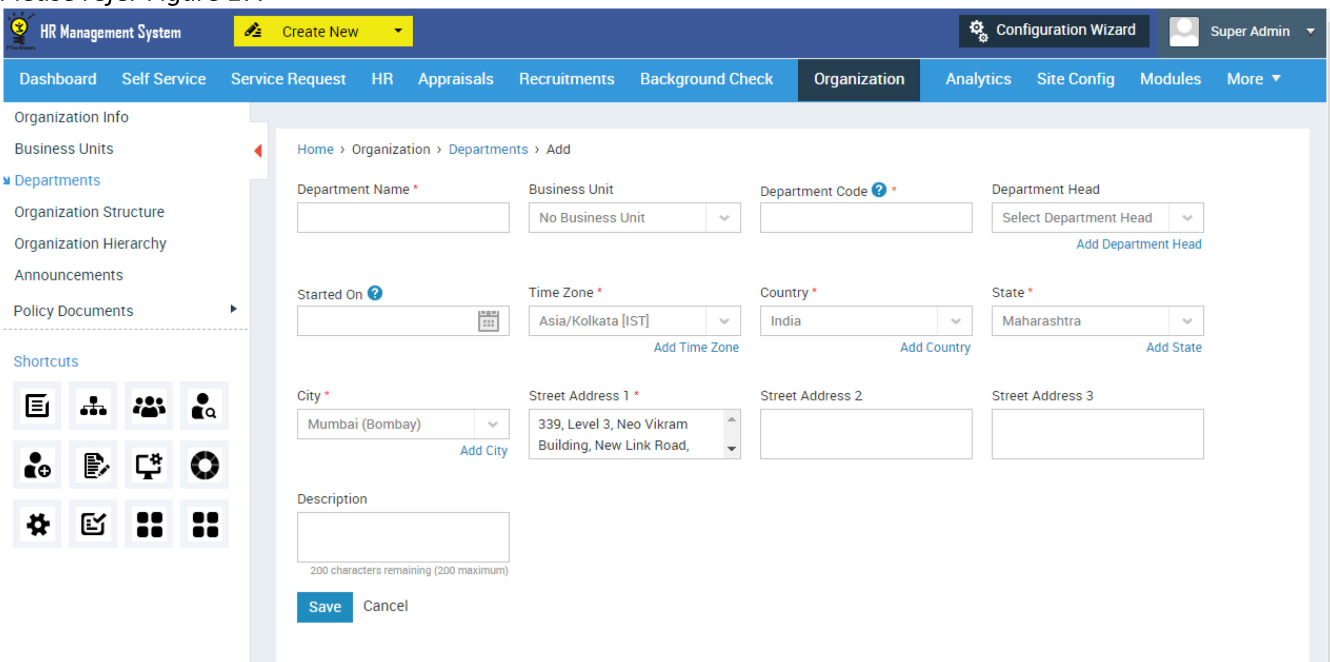
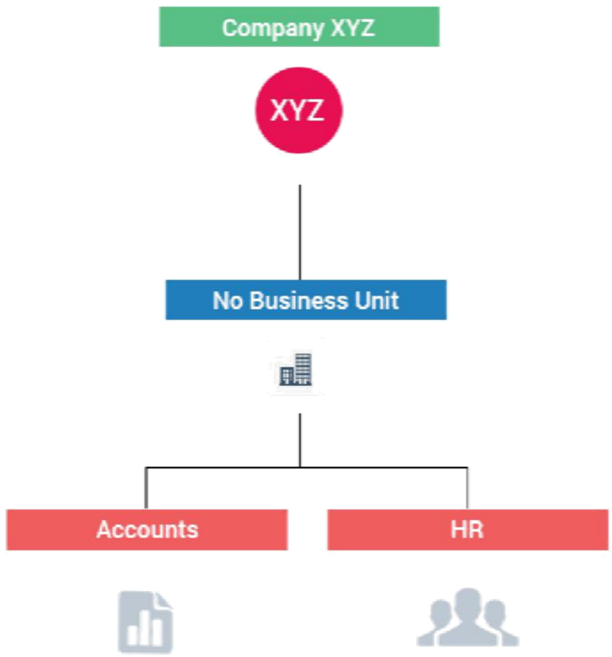


Figure 17

d. Enter the necessary details
e. Click **Save** button to create a new department

1.5.3 No Business Unit

If you need only Departments and no Business Units, then you can go for the option ‘No Business Unit’. While creating a Department (refer <u>1.5.2 Adding Departments</u>) select the option ‘No Business Unit’ in the Business Unit field.



Please refer Figure 18.

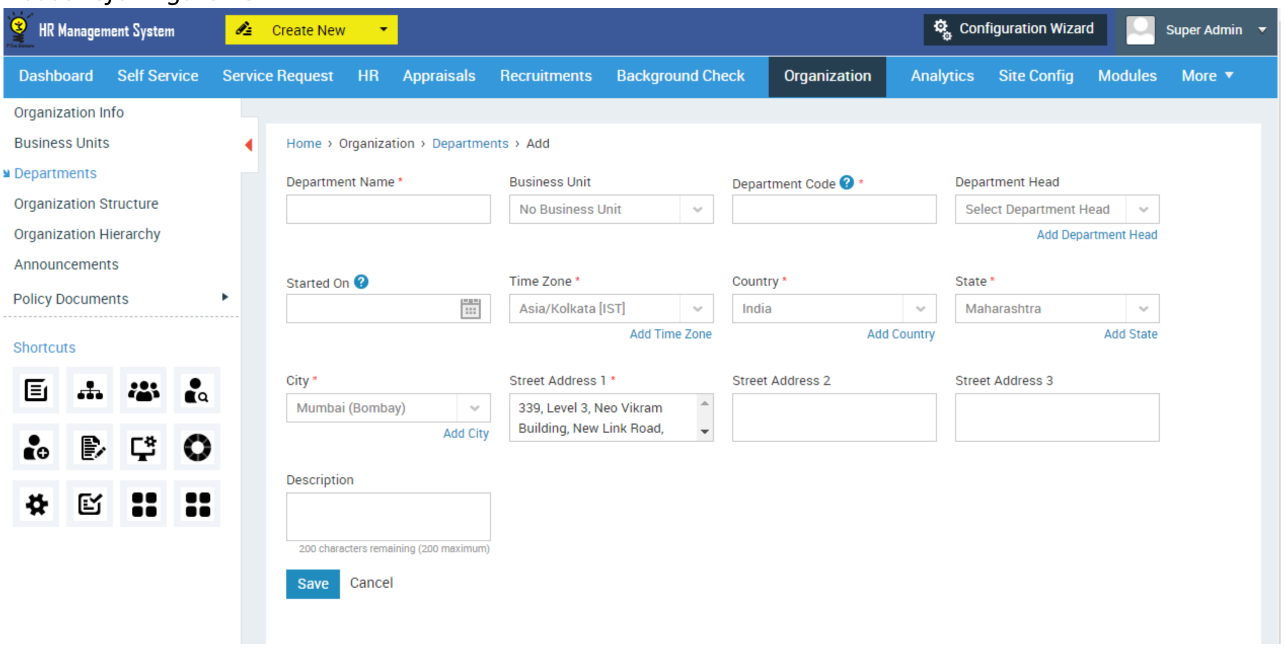


Figure 18

a. Select the option 'No Business Unit'

1.6 How do I add Job Titles and Positions?

Job title is an employee's designation and Position is the designation level. For example if the Job title is Software Engineer, then the Position can be Senior Software Engineer or Associate Software Engineer.

1.6.1 Adding Job Titles

Please refer Figure 19.

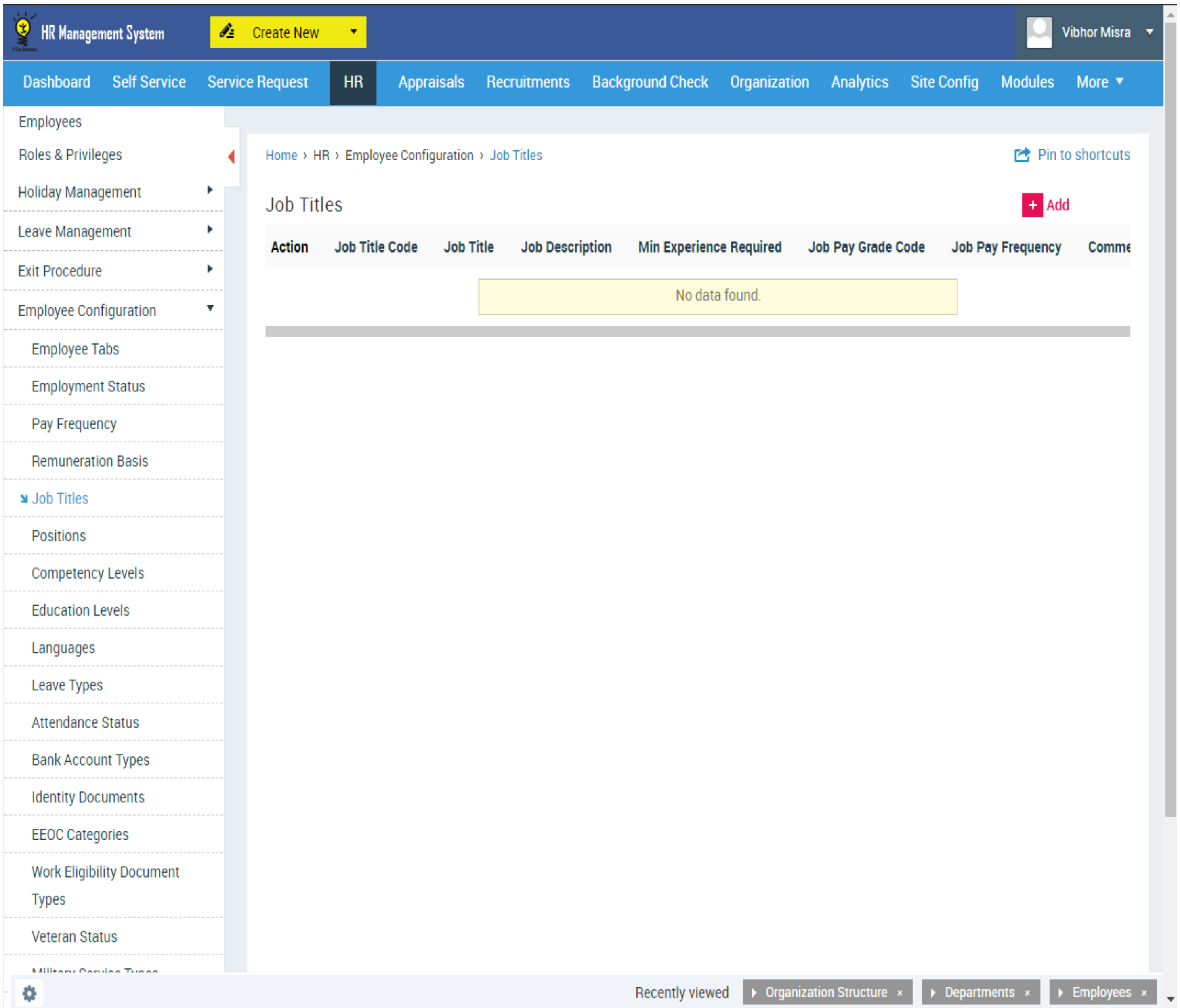


Figure 19

a. Click **HR** in the top menu
b. Click **Employee Configuration**, it will expand to give more menu items
c. Click **Job Titles**
d. Click **+Add** button on the right side

Please refer Figure 20.

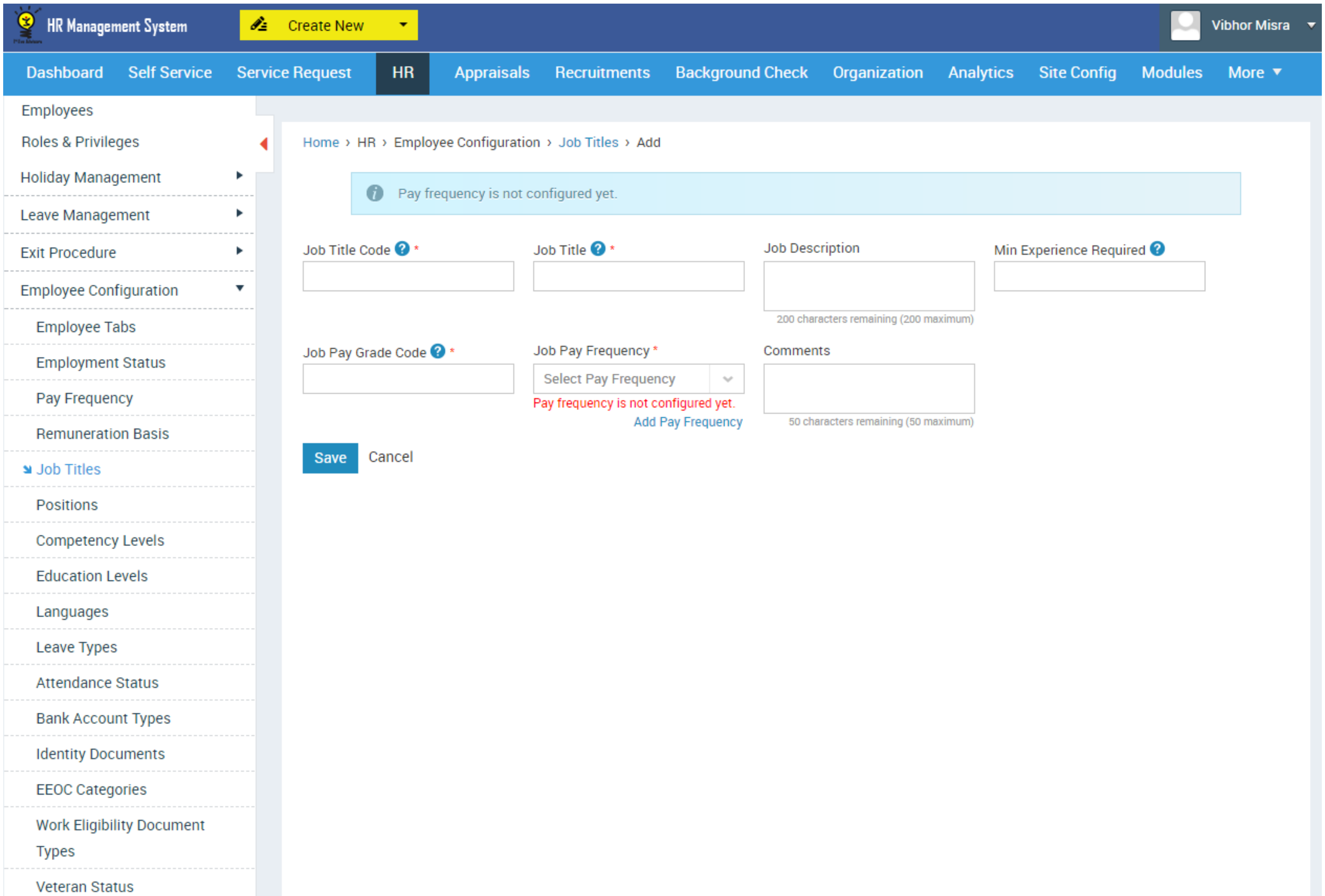


Figure 20

e. Fill in the required details
f. Click **Add Pay Frequency** to add different frequency categories like Monthly, Daily etc.
g. Click **Save** button to create a new job title

1.6.2 Adding Positions

Please refer Figure 21.

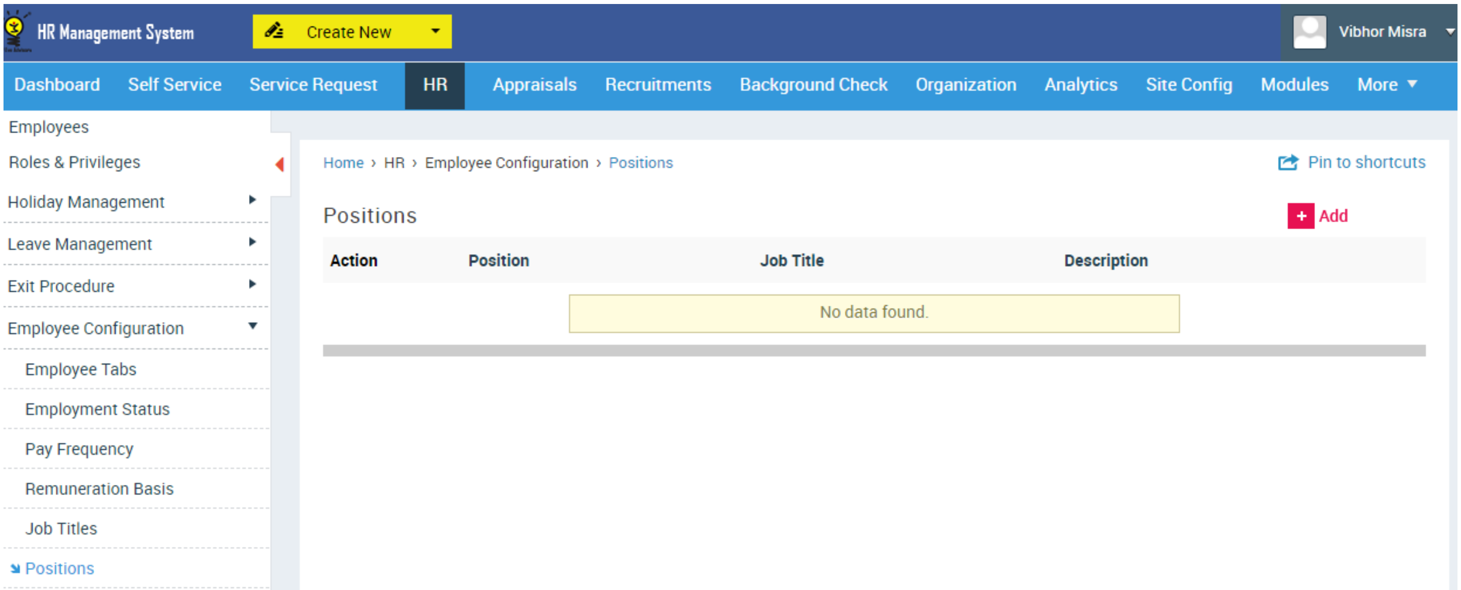


Figure 21

a. Click **HR** in the top menu
b. Click **Employee Configuration**, it will expand to give more menu items
c. Click **Positions** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 22.

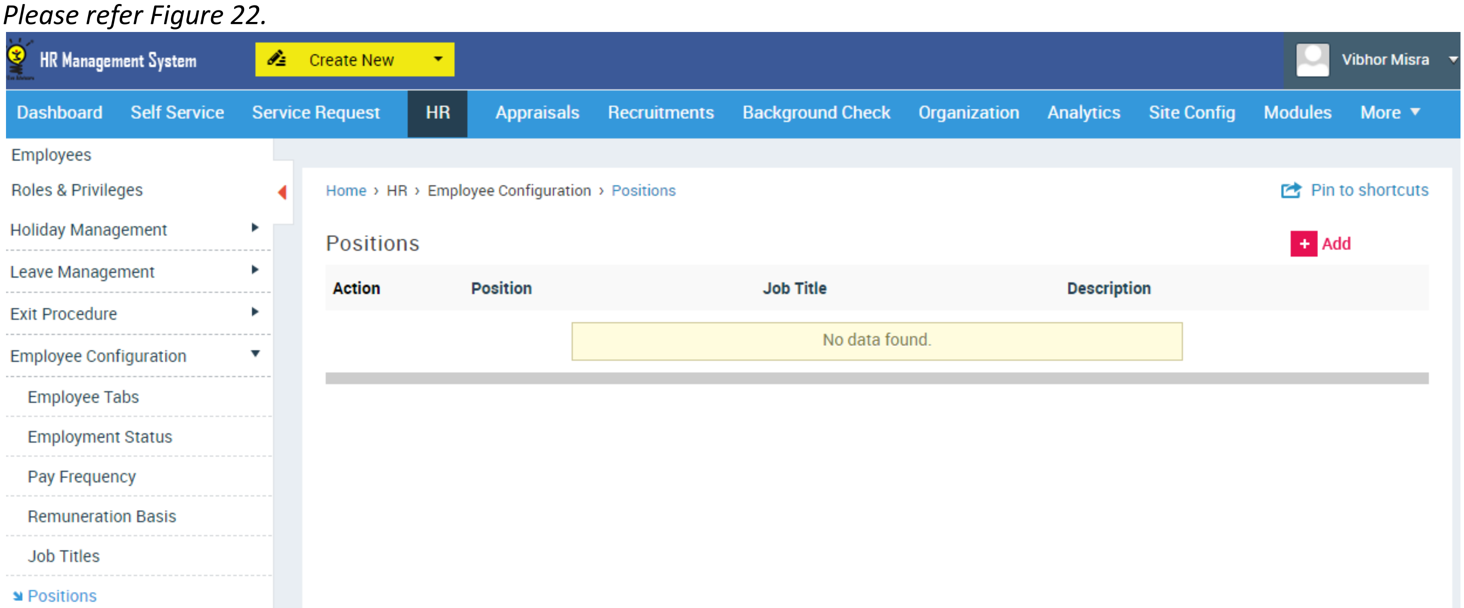


Figure 22

e. Fill in the required details
f. Click **SAVE** to successfully create a position.

You can create a Position only after creating a Job Title

2. Dashboard

HRMS's dashboard enables you to have all the information you need at a glance. You can decide what elements you need on the dashboard by configuring widgets. You can also view announcements and your colleagues' upcoming birthday.

2.1 How do I add Widgets?

Please refer Figure 23.

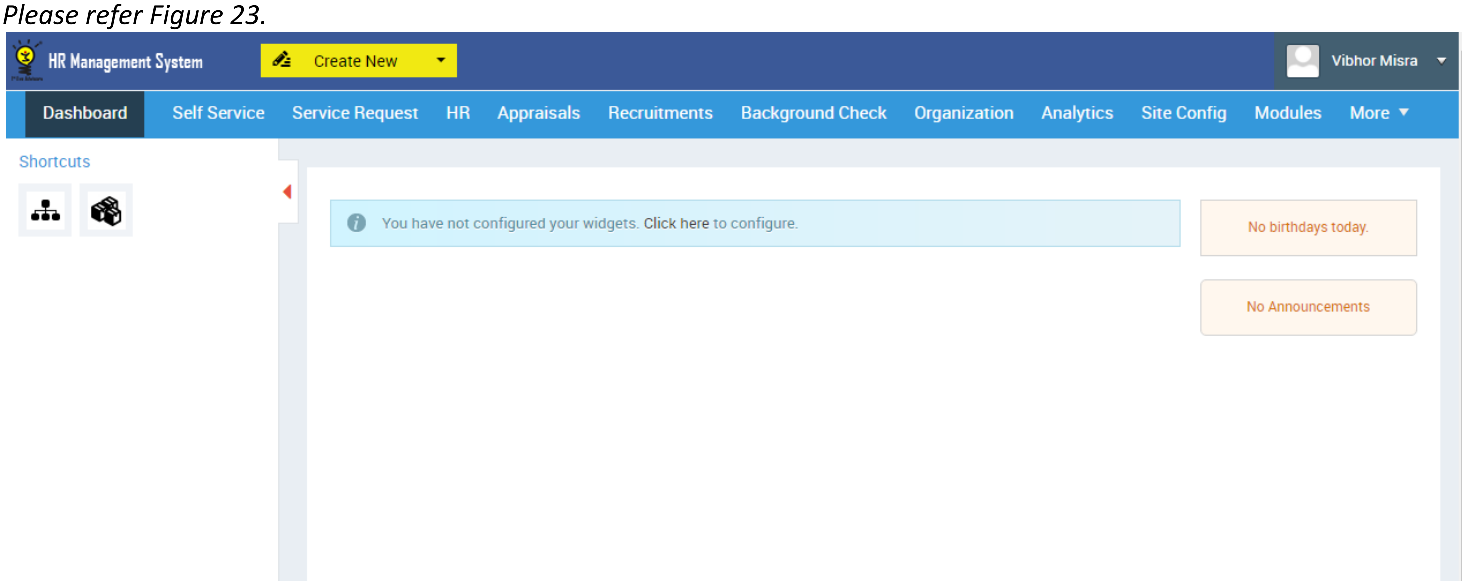


Figure 23

You can configure your widgets on your dashboard using the below methods:

a. Click the organization logo on the top left corner (This will take you to the dashboard from any other screen)
b. Click **Click here** link at the center of the dashboard

Or

c. Click the **logged in user's name** in the top right corner
d. Click **Settings** in the dropdown

Or

e. Click the **gear icon** in the bottom left corner

Please refer Figure 24.

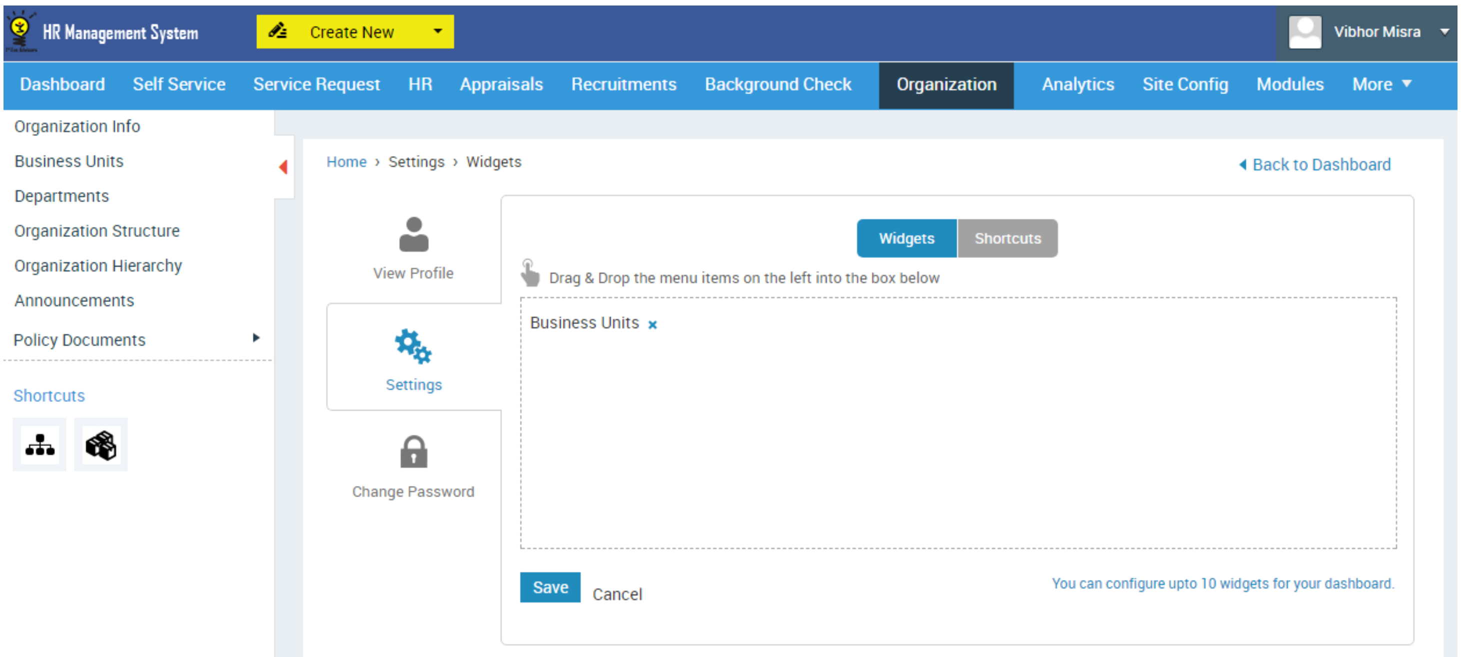


Figure 24

(Common for all)

f. Click **Widgets** button in the settings page
g. Drag and drop the selected menu item(s) in the widgets box
h. Click **SAVE** button to add Widgets in the Widgets pane

2.2 How do I add Shortcuts?

Please refer Figure 25.

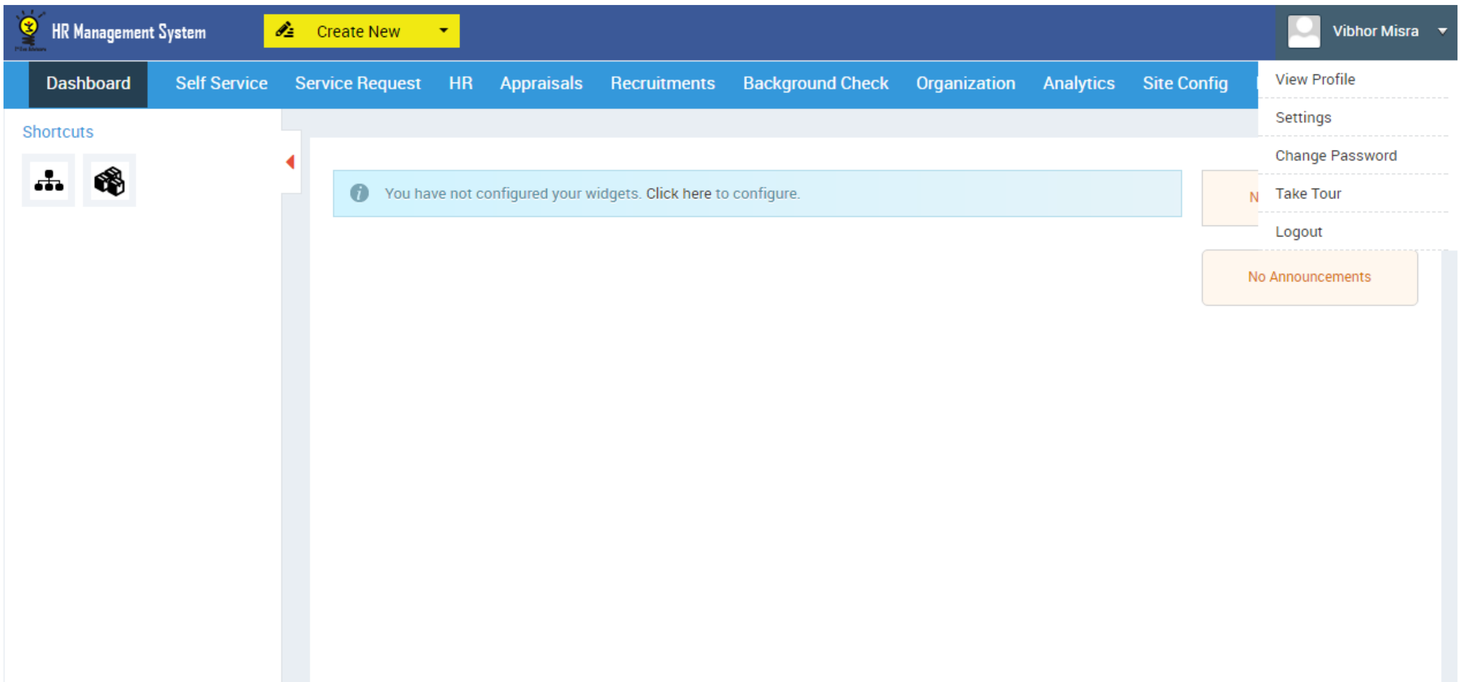


Figure 25

You can configure your shortcuts on your dashboard using the below methods:

a. Click the organization logo on the top left corner (This will take you to the dashboard from any other screen)
b. Click **Click here** link at the center of the dashboard

Or

c. Click the **logged in user's name** in the top right corner
d. Click **Settings** in the dropdown

Or

e. Click the **gear icon** in the bottom left corner

Please refer Figure 26.

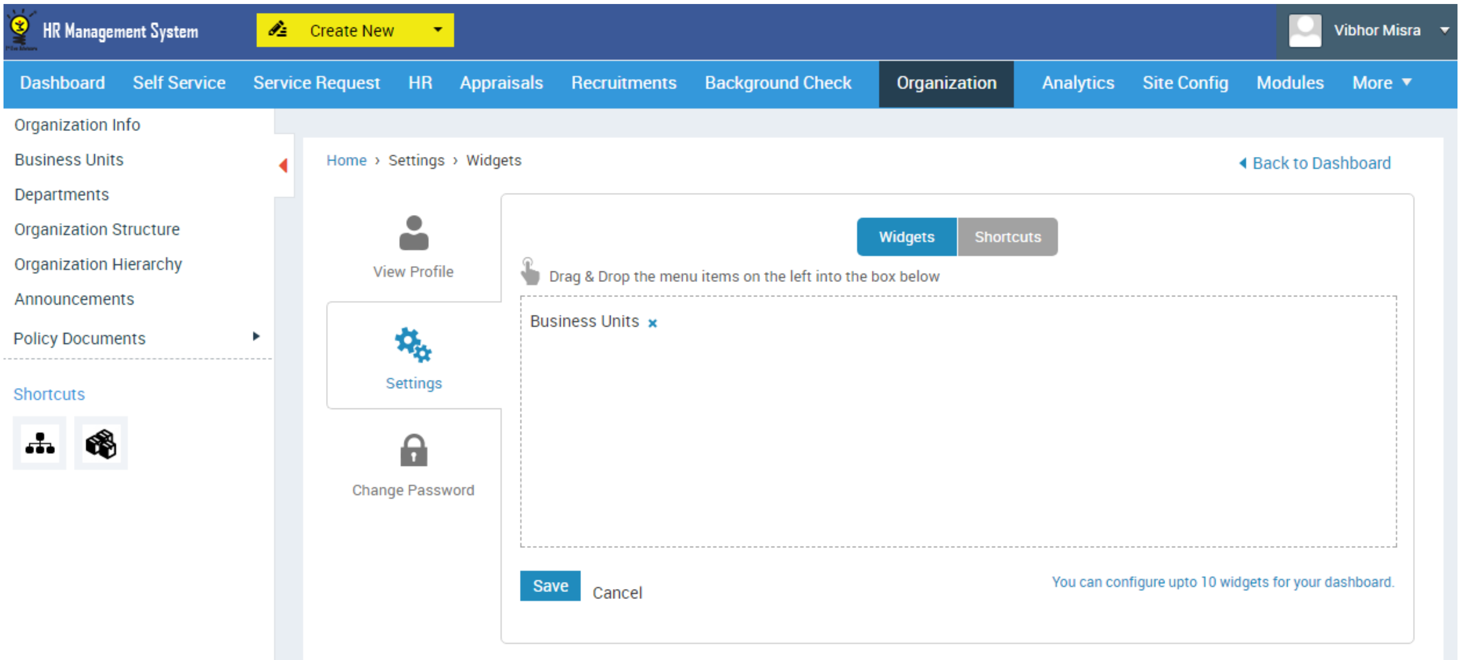
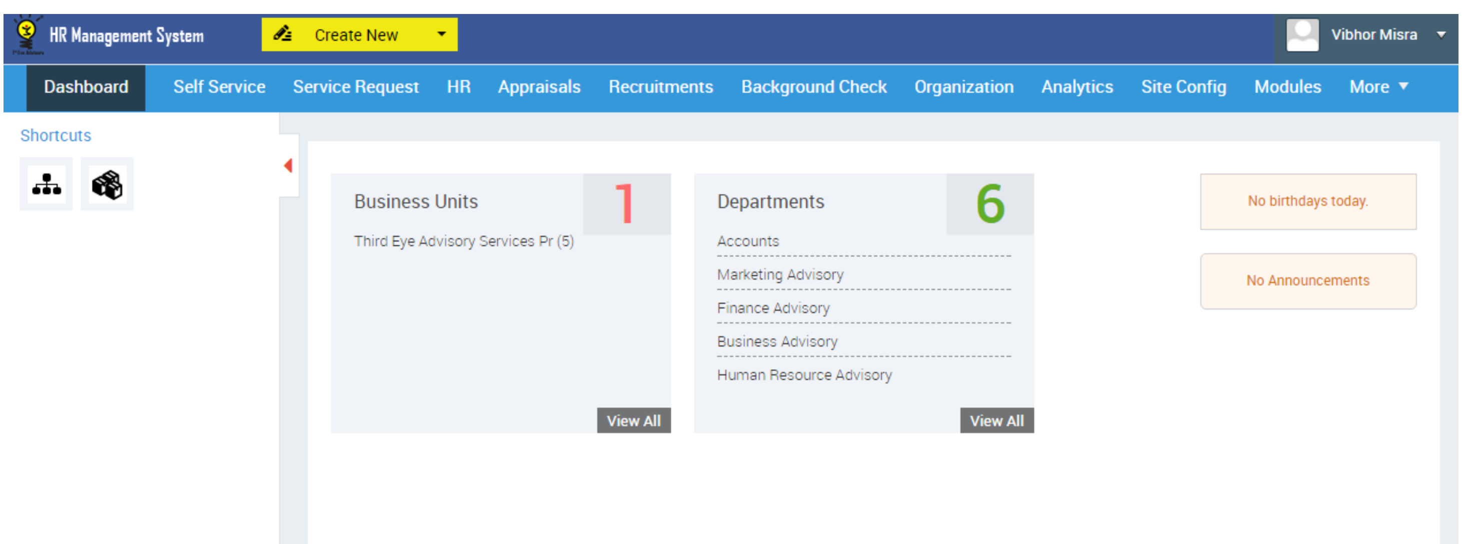


Figure 26

(Common for all)

f. Click **Shortcuts** button in the settings page
g. Drag and drop the selected menu item(s) in the widgets box
h. Click **SAVE** button to add Shortcuts in the Shortcuts pane

This is how your widgets and shortcuts will appear on the dashboard after you've saved them, refer the image below:



2.3 How do I add Announcements?

Announcements can be created by the Super Admin, Management & HR. The announcements will appear on every user's dashboard.

Please refer Figure 27

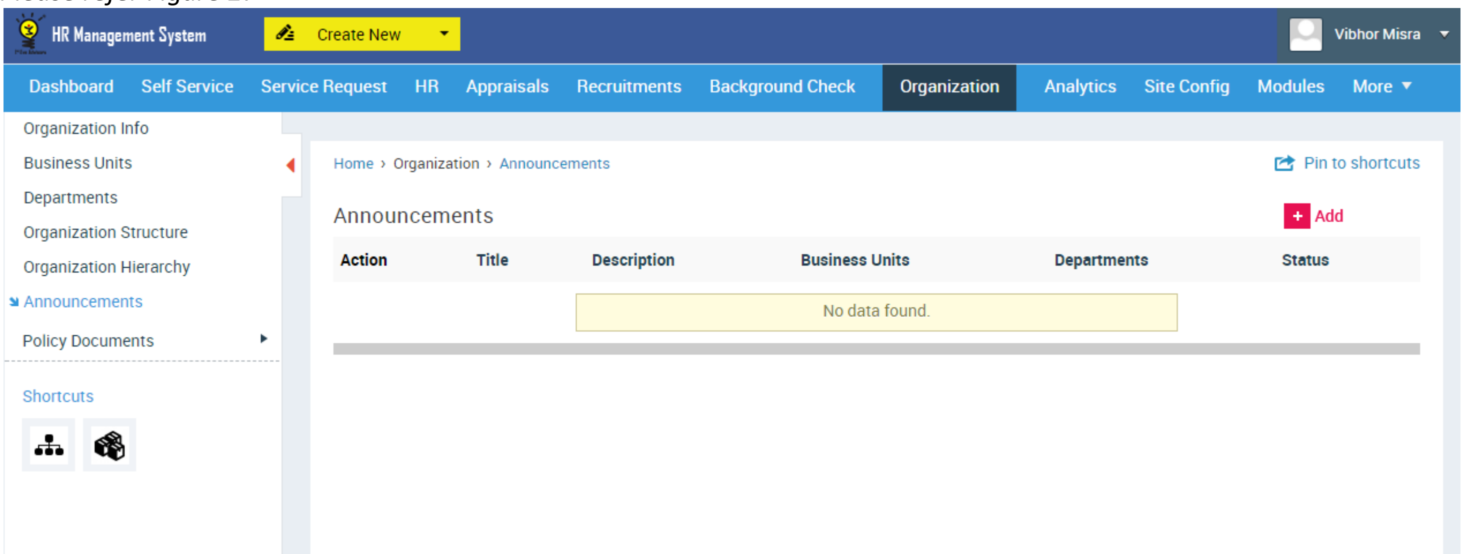


Figure 27

a. Click **Organization** in the top menu
b. Click **Announcements** on the left menu panel
c. Click **+Add** button on the right side

Please refer Figure 28.

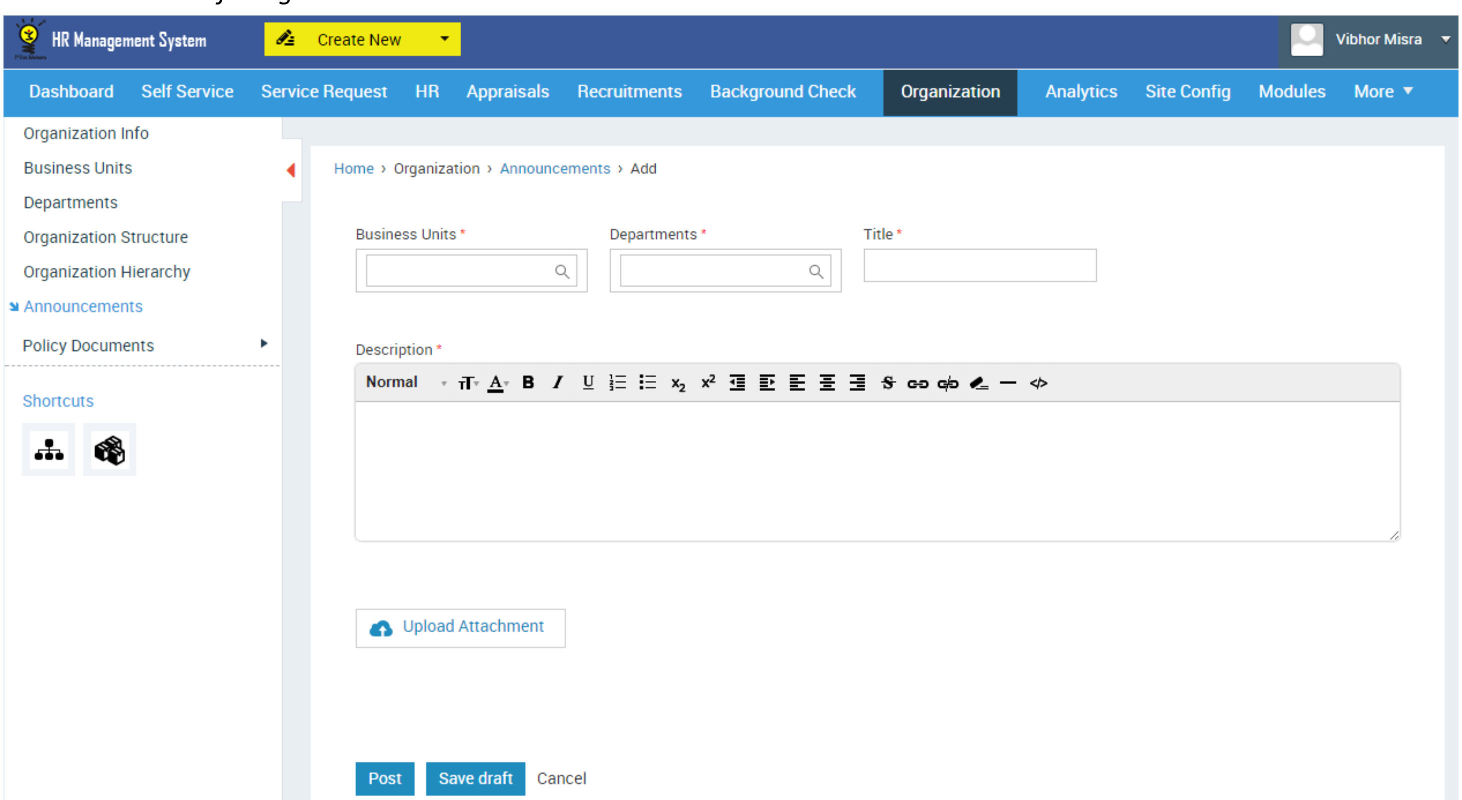


Figure 28

d. Select the Business Unit(s), Department and Title
e. Upload Attachment if required
f. Click **Post** button to publish the announcements

2.4 How do I add Birthday Announcements?

Birthday updates will be displayed if it's any employee's birthday on that particular date.

Please refer Figure 29.

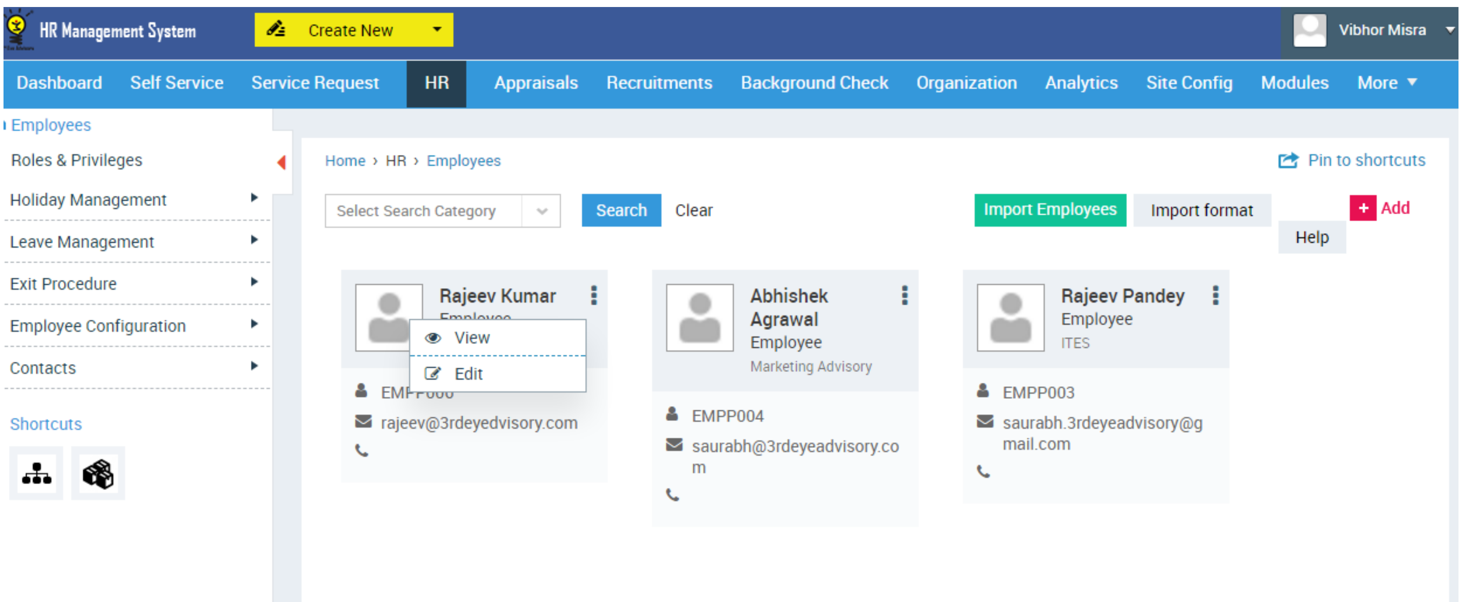


Figure 29

To add an employee's birthday:

a. Click **HR** in the top menu
b. Click **More Actions** icon
c. Click **Edit** icon against any employee's name

Please refer Figure 30.

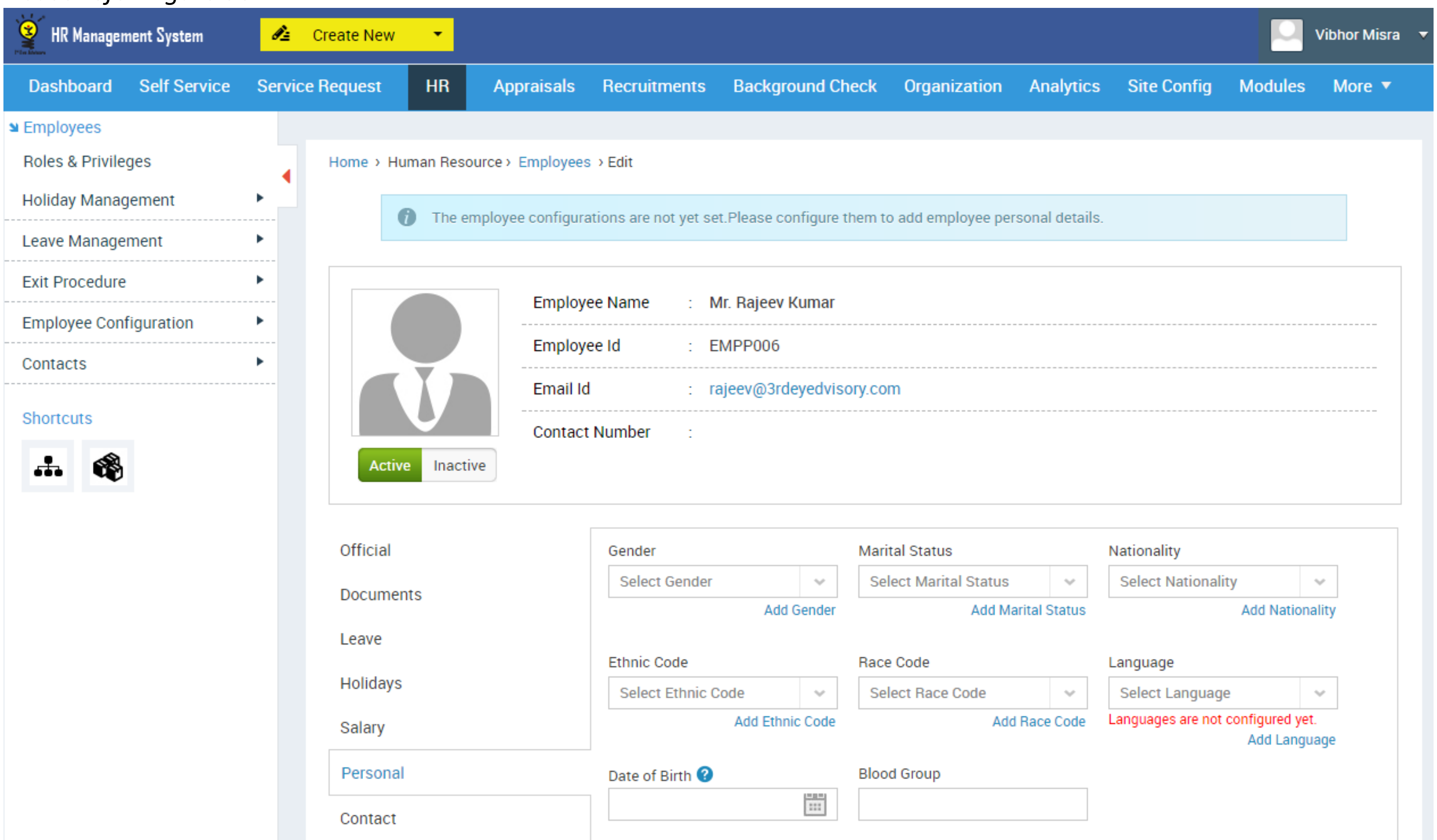


Figure 30

d. Click **Personal** menu option on the left menu panel (left side of the form)
e. Enter the birth date in the 'Date of Birth' field
f. Click **SAVE** button

Once the birth dates of employees have been added, a birthday announcement will be displayed on their birthdays.

Please refer Figure 31.

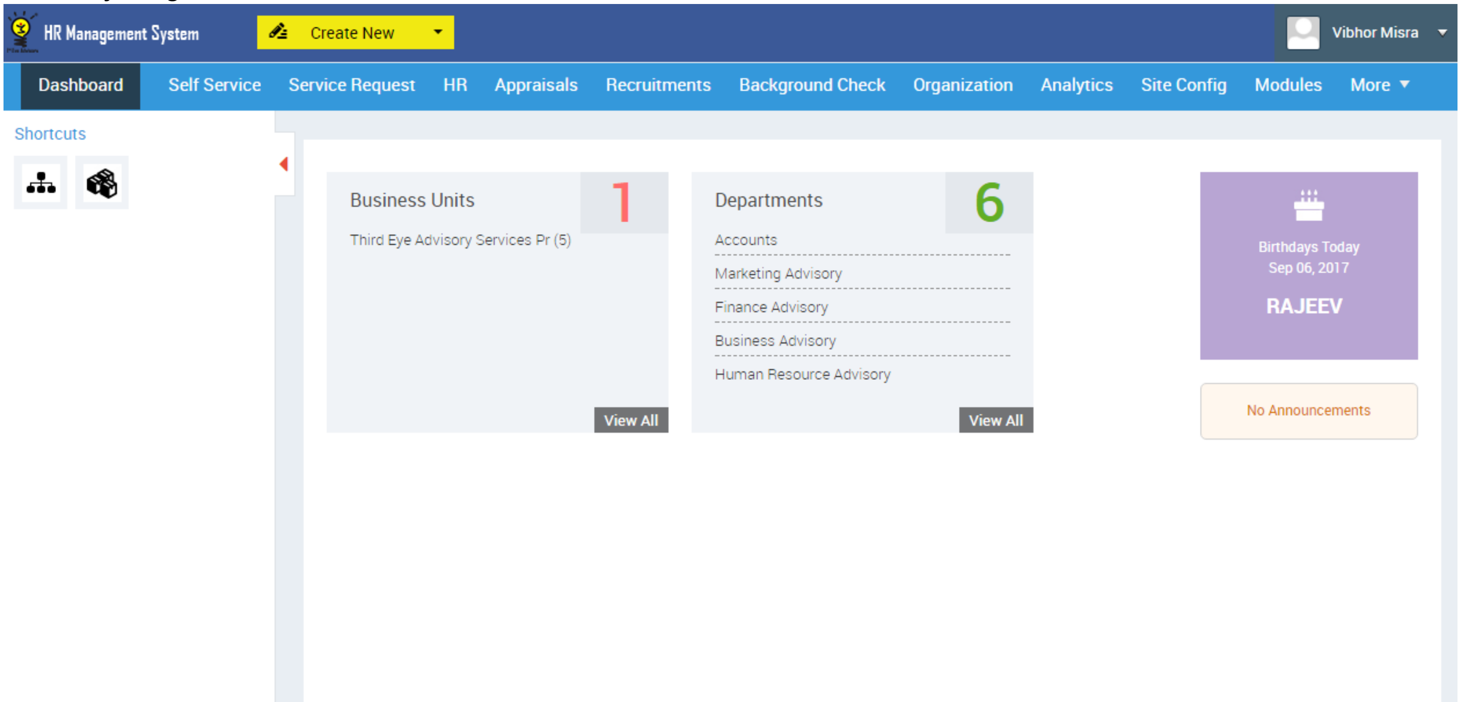
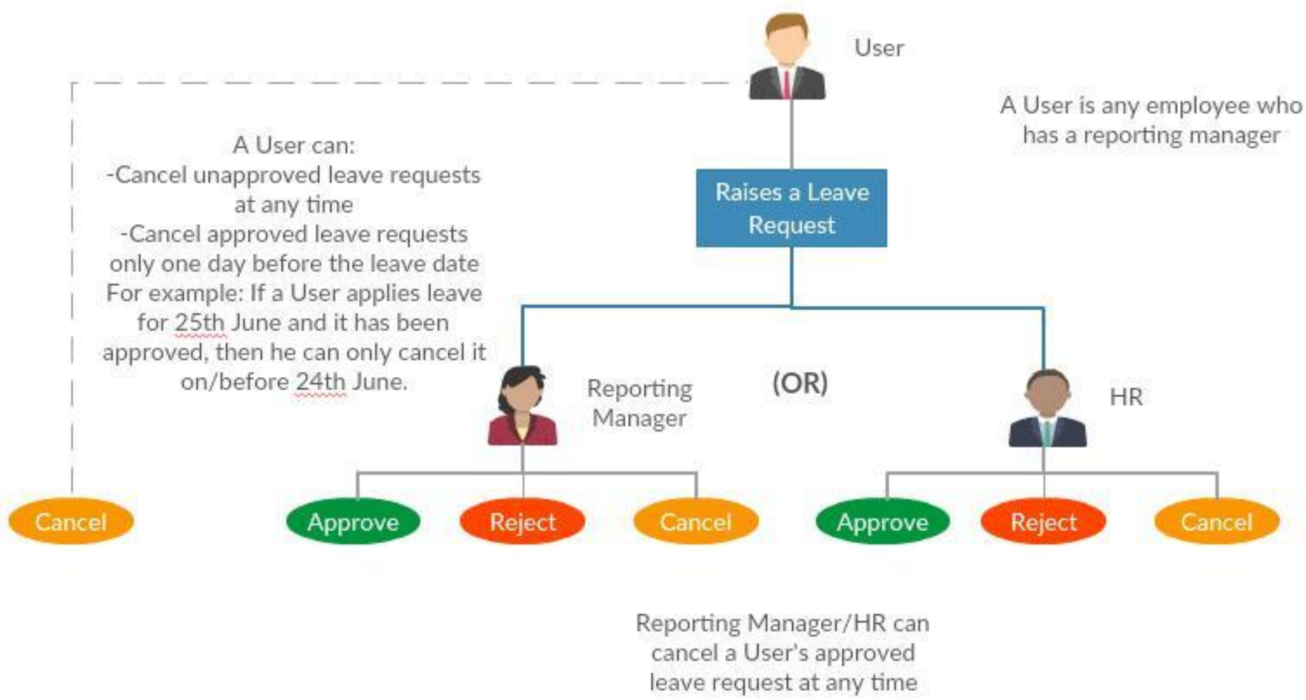


Figure 31

Only the Super Admin and Organization Head can view every employee's birthday announcement. Others can only view birthday announcements of employees in the same department as them.

3. Leave Management

One of the main features available in Self Service is Leave Management. You can raise leave requests and have them approved by your Reporting Manager/HR. Below is the leave management process flowchart.



Process Description:

- A User (Any User who has a reporting manager) raises a leave request.
- The User can cancel his leave request unapproved or approved (one day before the leave date)
- Either the Reporting Manager or HR can approve/reject/cancel (at any time) the leave request.

After an approved leave request has been cancelled, the leave(s) are credited back to the user’s leave balance.

3.1 How do I configure Leave Management Settings?

The **Super Admin/HR** can configure the leave settings and allot leaves for employees. The employees can then utilize the leaves allotted to them.

Leave Management Options

Please refer Figure 32.

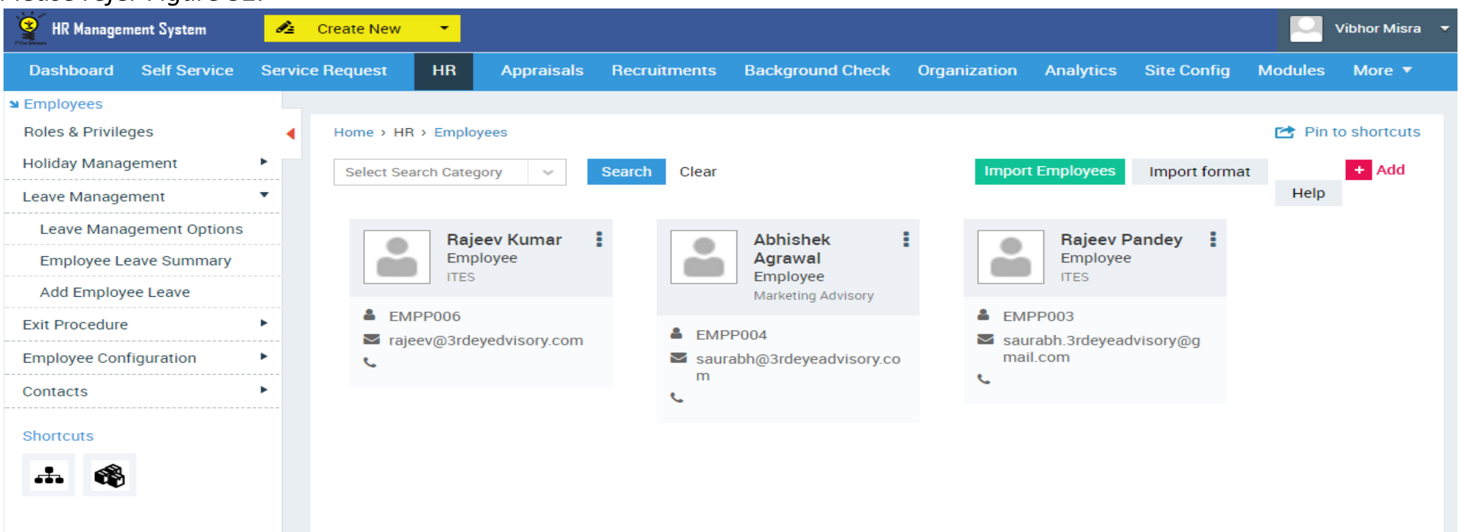


Figure 32

To configure leave management options:

a. Click **HR** in the top menu
b. Click **Leave Management** on the left panel
c. Click **Leave Management Options** in the submenu
d. Click **+Add button** on the right side

Please refer Figure 33.

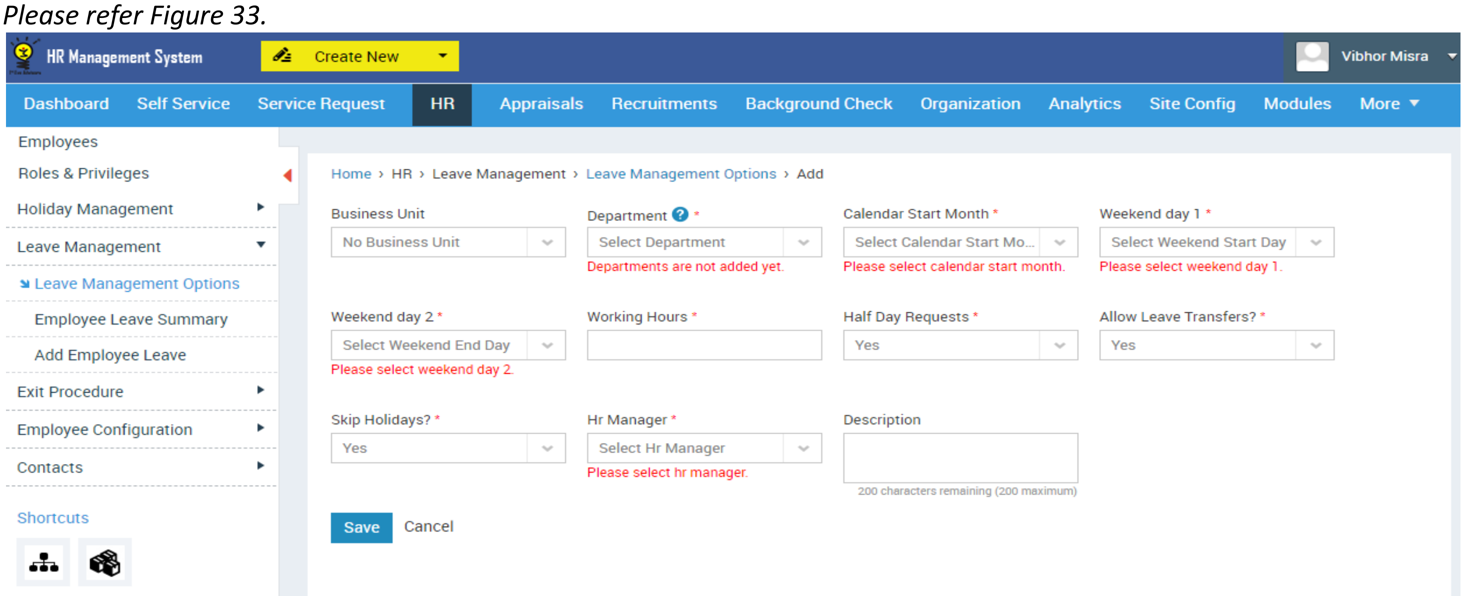


Figure 33

e. Fill in the required details
f. **Allow Leave Transfers:** If there are any unused leaves for an employee in the current year, then by using this option they will be carried forward to the next year
g. **Skip Holidays:** If a user applies for a vacation which includes any pre-declared holiday, then by using this option, holiday will be excluded from the vacation days
h. Click **SAVE** button

If each business unit in your organization has different working days and hours, then using this option you can configure the settings.

3.2 How do I create Leave Types?

Please refer Figure 34.

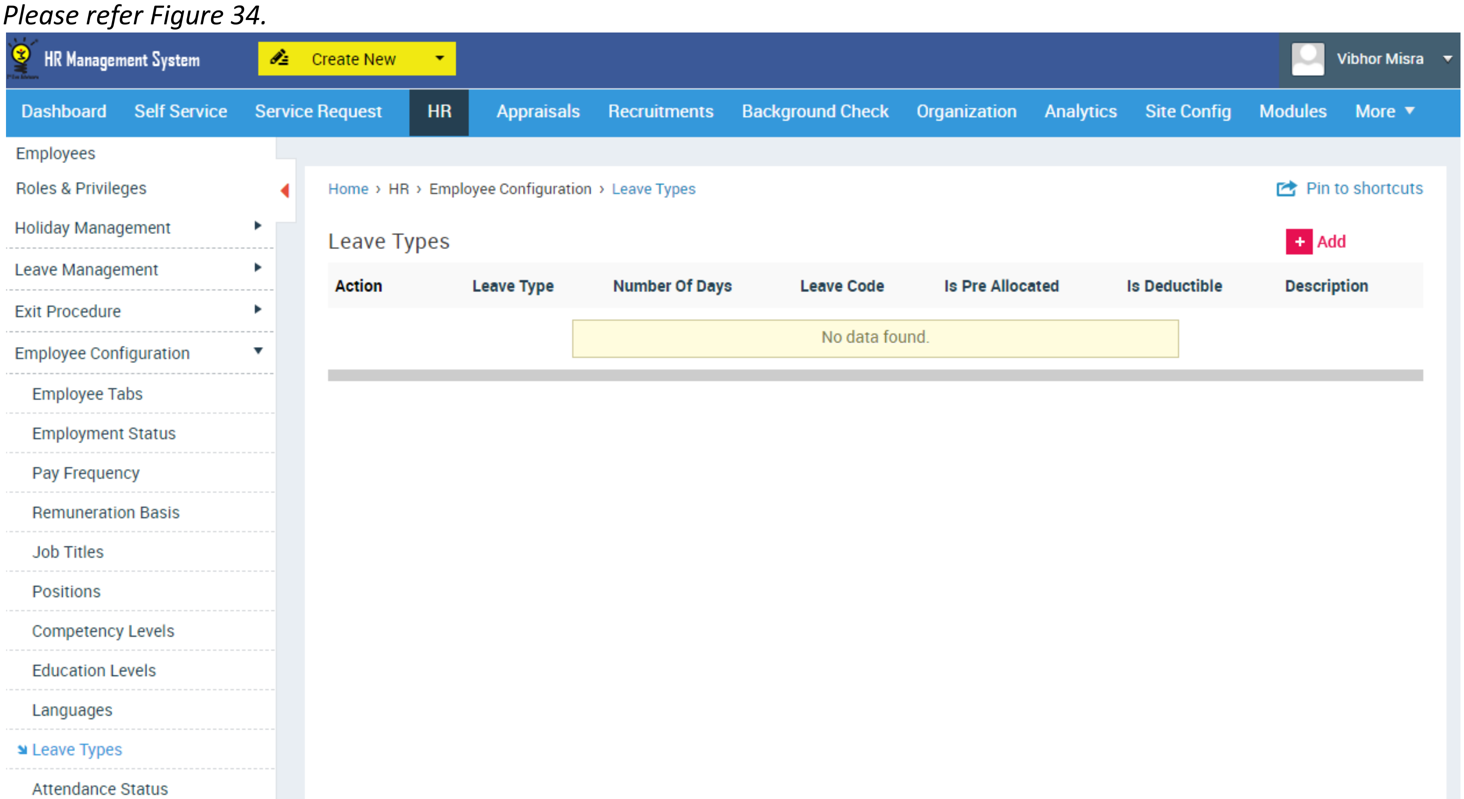


Figure 34

a. Click **HR** in the top menu
b. Click **Employee Configuration** on the left menu panel
c. Click **Leave Types** in the submenu
d. Click **+Add button** on the right side

Please refer Figure 35.

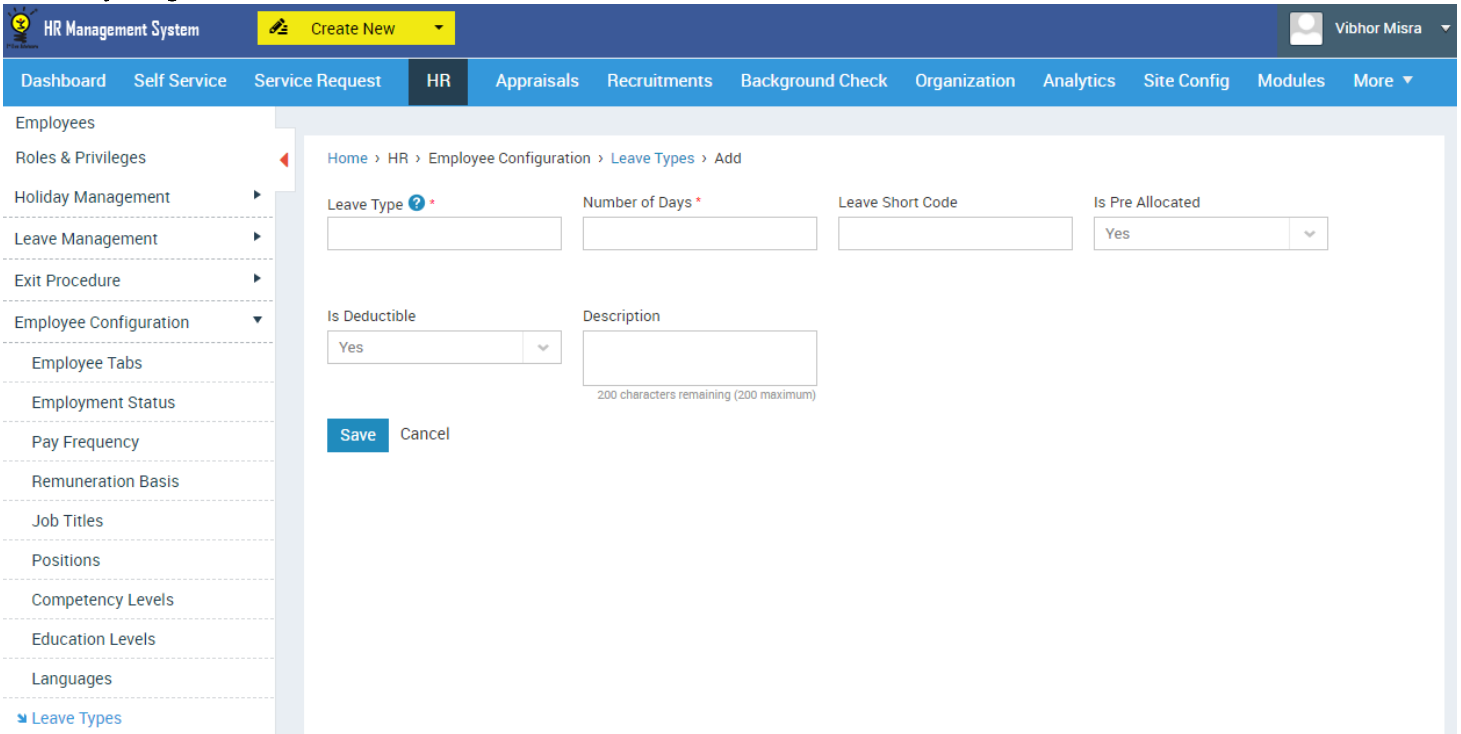


Figure 35

e. Fill in the required details
f. Click **SAVE** button to create a new leave type

The number of days assigned to a Leave Type denotes the maximum number of days a User can apply for a leave at one go. It's not the total leave balance for a leave type.

3.3 How do I allocate Leave to Employees?

There are two ways to allocate leaves to employees:

1) Multiple employees at once (according to Business Units and Departments)

2) One employee at a time

<u>Multiple employees at once (according to Business Units and Departments)</u>

Please refer Figure 36

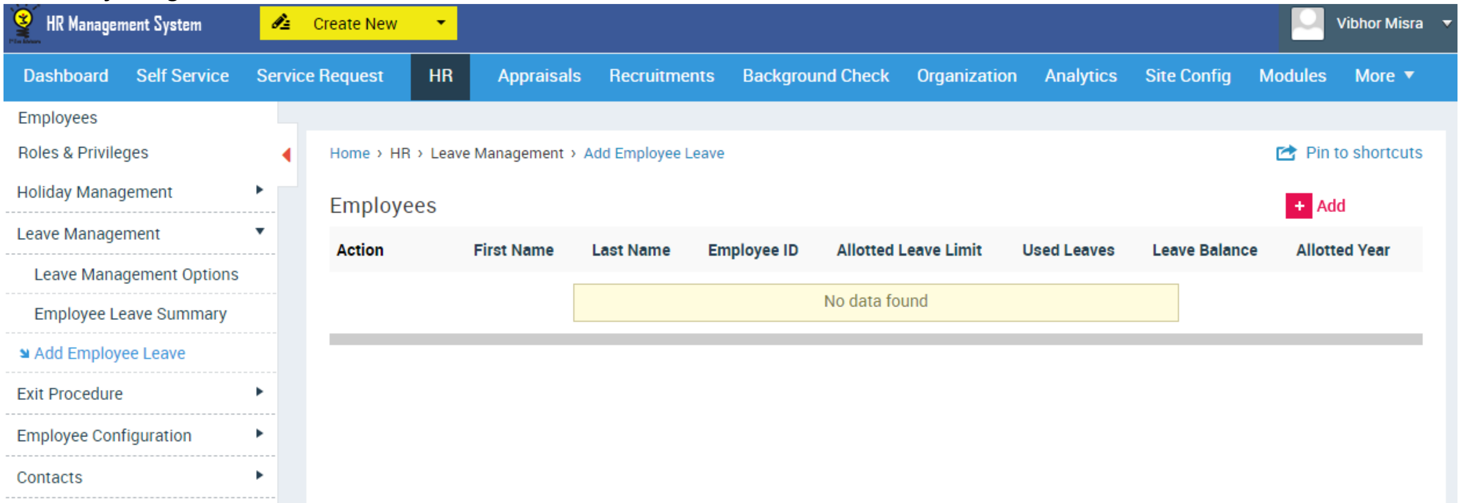


Figure 36

a. Click **HR** in the top menu
b. Click **Leave Management** in the left side panel
c. Click **Add Employee Leave** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 37

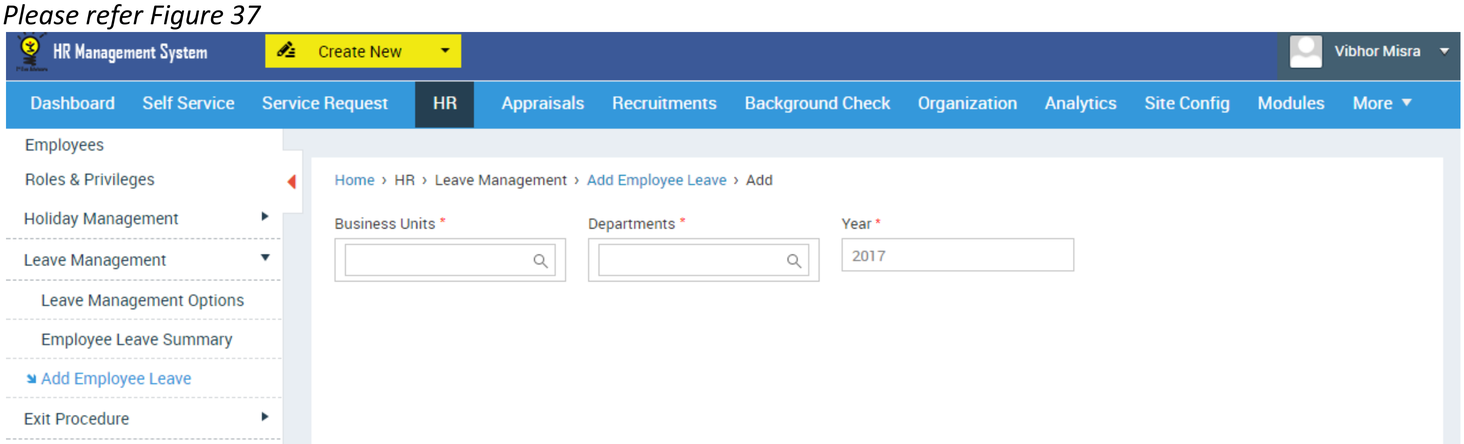


Figure 37

e. Select the Business Unit(s)
f. Select the Department(s)

All the employees in the selected Business Unit(s) and Department(s) will be displayed.

Please refer Figure 38

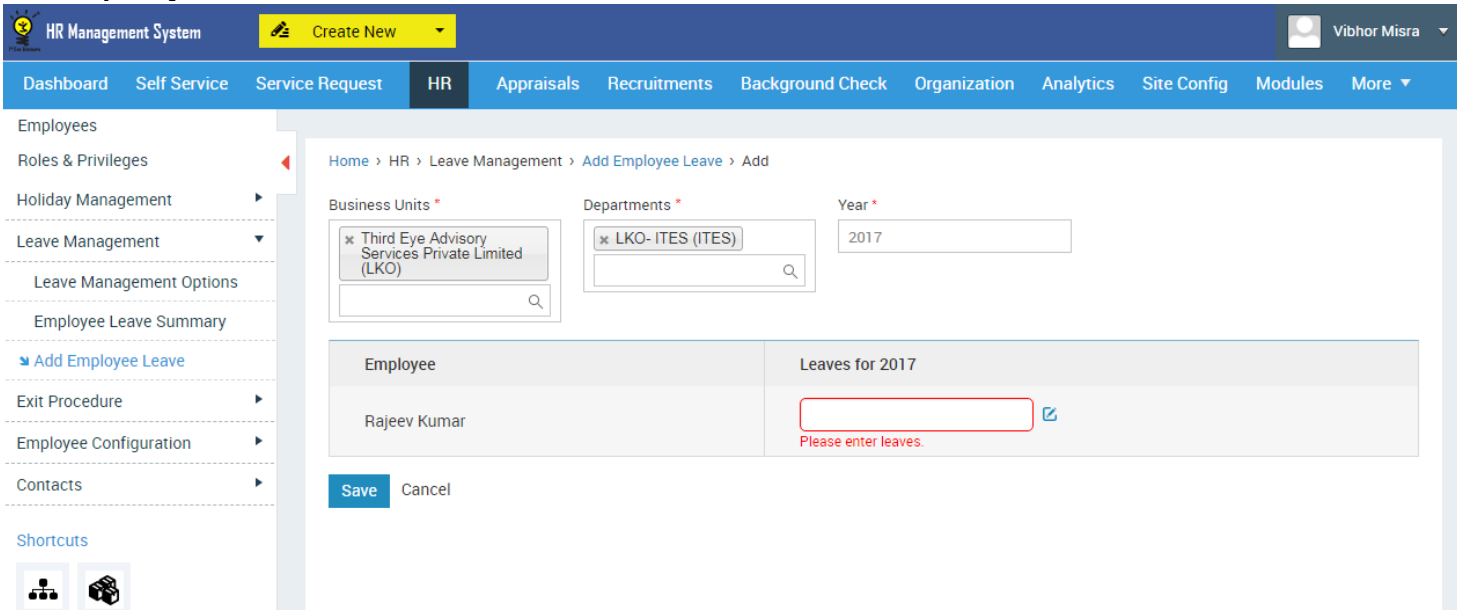


Figure 38

g. Click **Edit** icon
h. Enter the number of leaves for each employee
i. Click **SAVE** button

One employee at a time

Please refer Figure 39

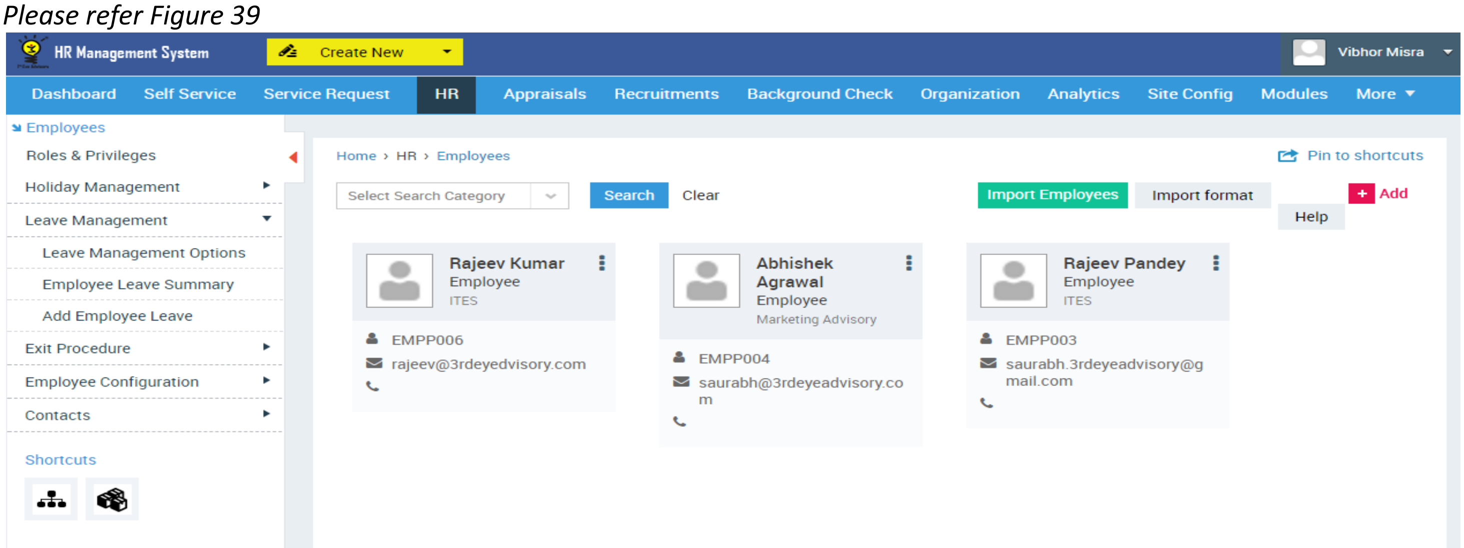


Figure 39

a. Click **HR** in the top menu
b. Click **More Actions** icon
c. Click **Edit** icon

Please refer Figure 40

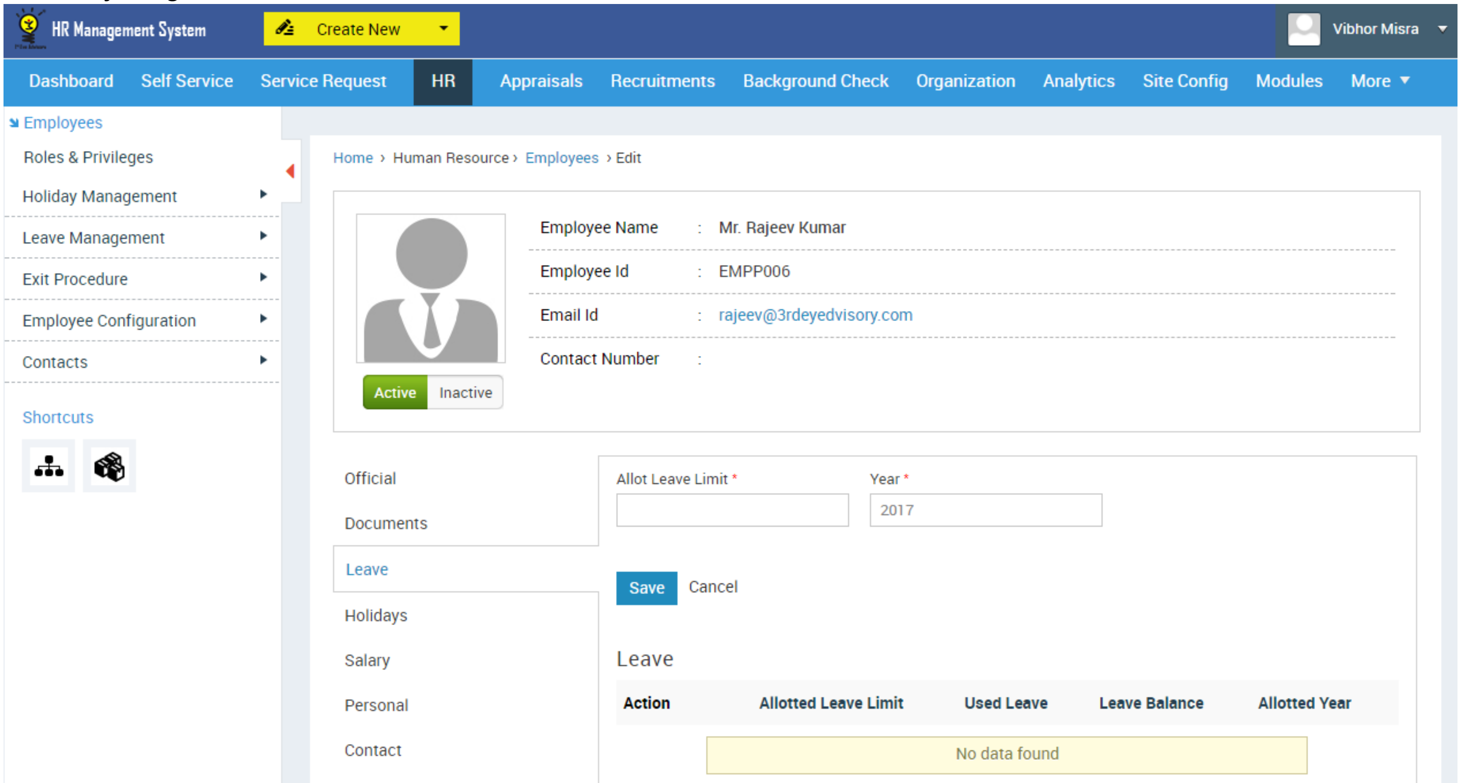


Figure 40

d. Click **Leaves** on the left menu panel (left side of the form)
e. Enter the number of days for this employee
f. Click **SAVE** button

You can allocate leaves to employees only for the current year

3.4 How do I deduct Leaves from an Employee?

Please refer Figure 41

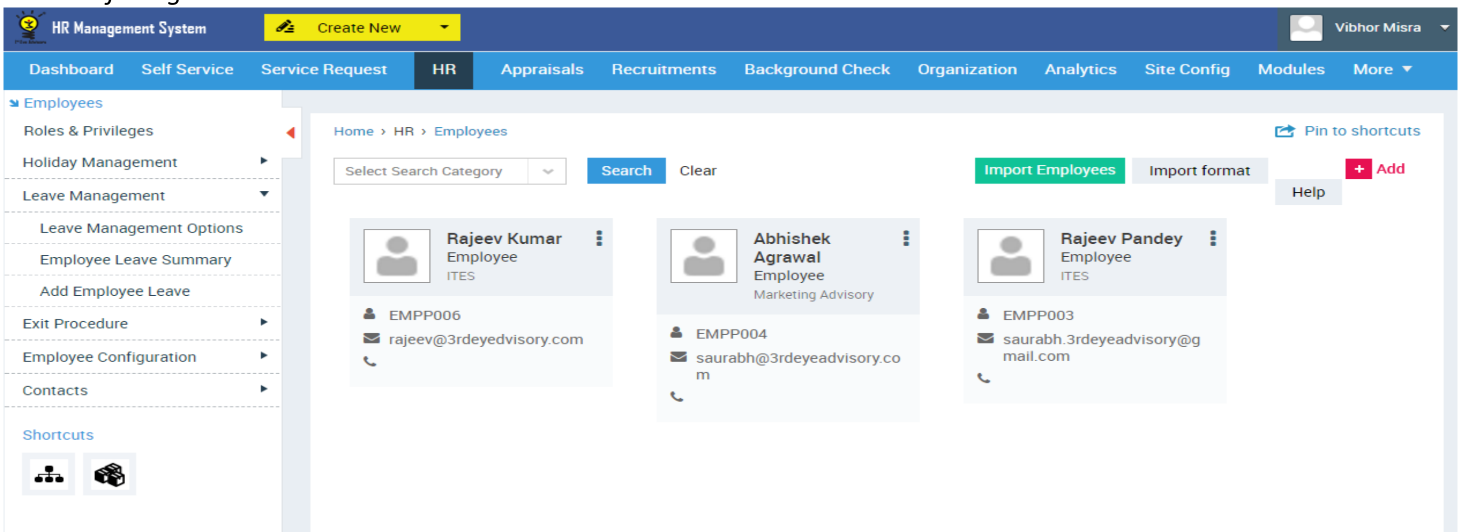


Figure 41

a. Click **HR** in the top menu
b. Click **More Actions** icon
c. Click **Edit** icon

Please refer Figure 42

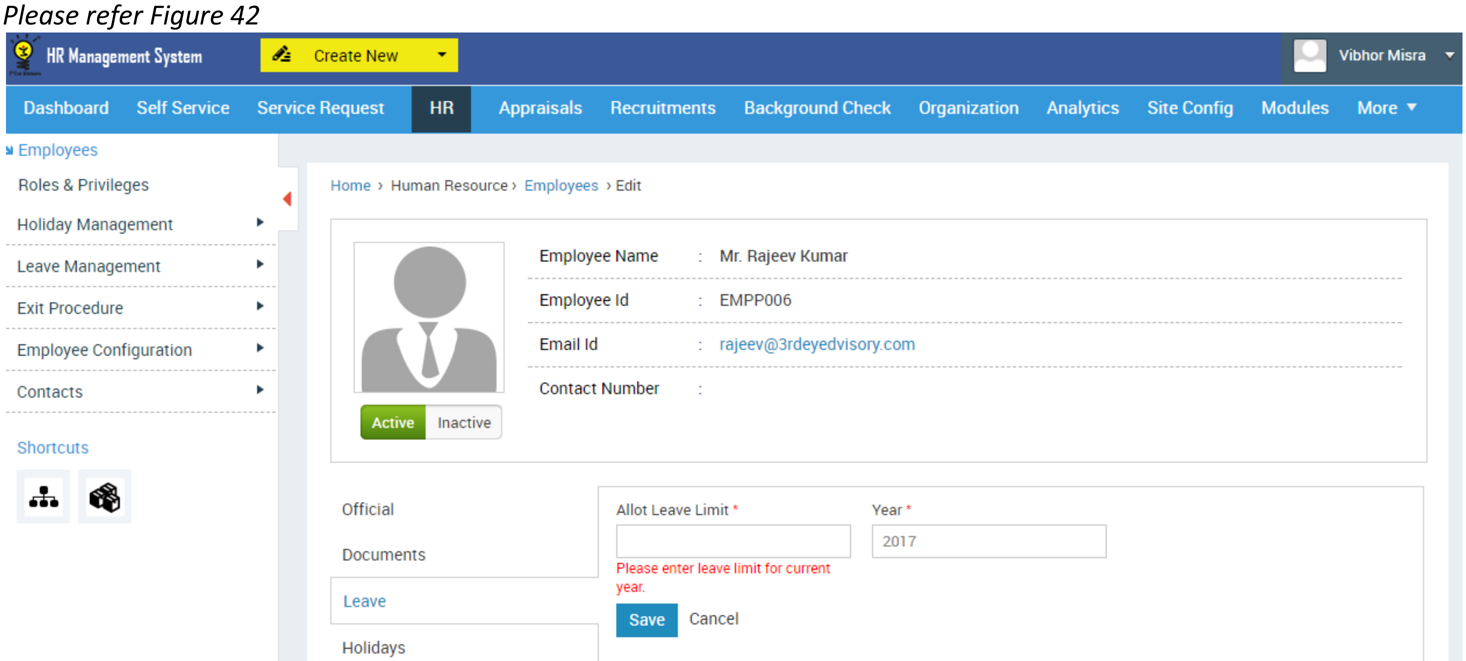


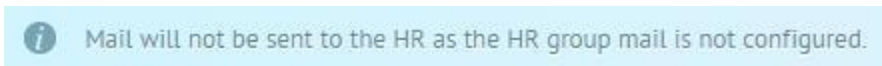
Figure 42

d. Click **Leaves** on the left menu panel (on the left side of the form)
e. Enter the number of days with a **'-' sign preceding the number** for the employee
f. Click **SAVE** button

You can add/remove leaves for an employee, whenever required.
(Only for the current year)

3.5 How do I create HR Email Group for Leave Management?

Employees and their reporting managers are informed through email notifications about any action (leave request raised, leave request approved etc.) taken during the leave cycle. In order to send email notifications to HR also, you will need to configure an HR email group. If an HR group email is not configured, the following message will be displayed:



Please refer Figure 43

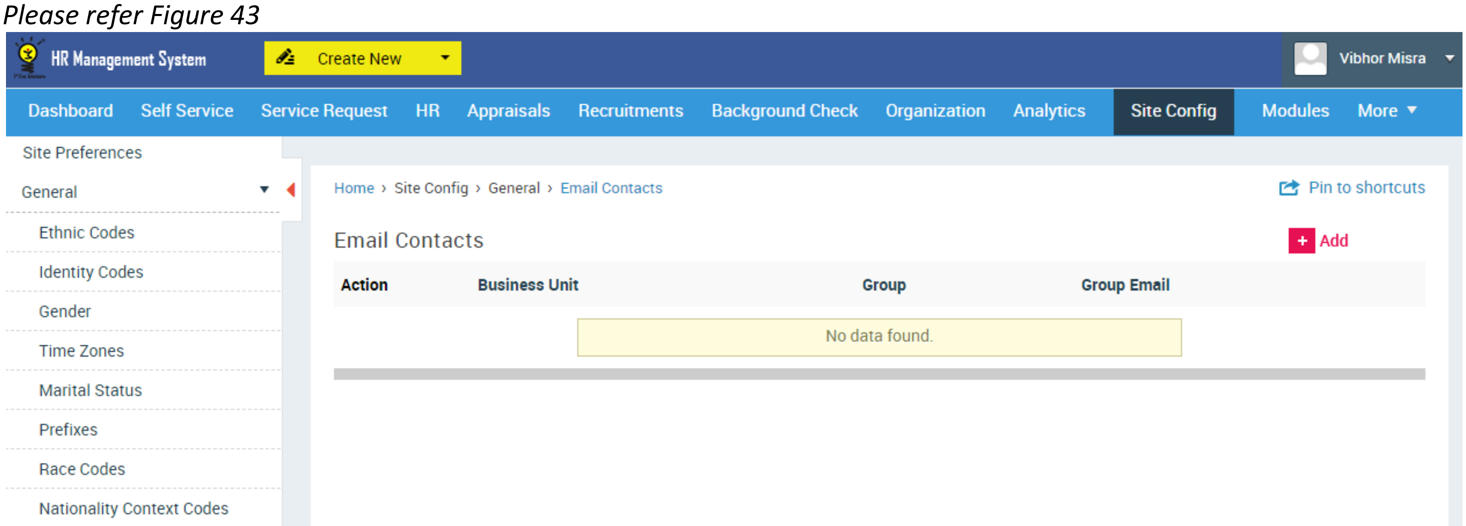


Figure 43

a. Click **Site Config** on the top menu
b. Click **General** on the left menu panel
c. Click **Email Contacts** in the submenu
d. Click **+Add** button

Please refer Figure 44

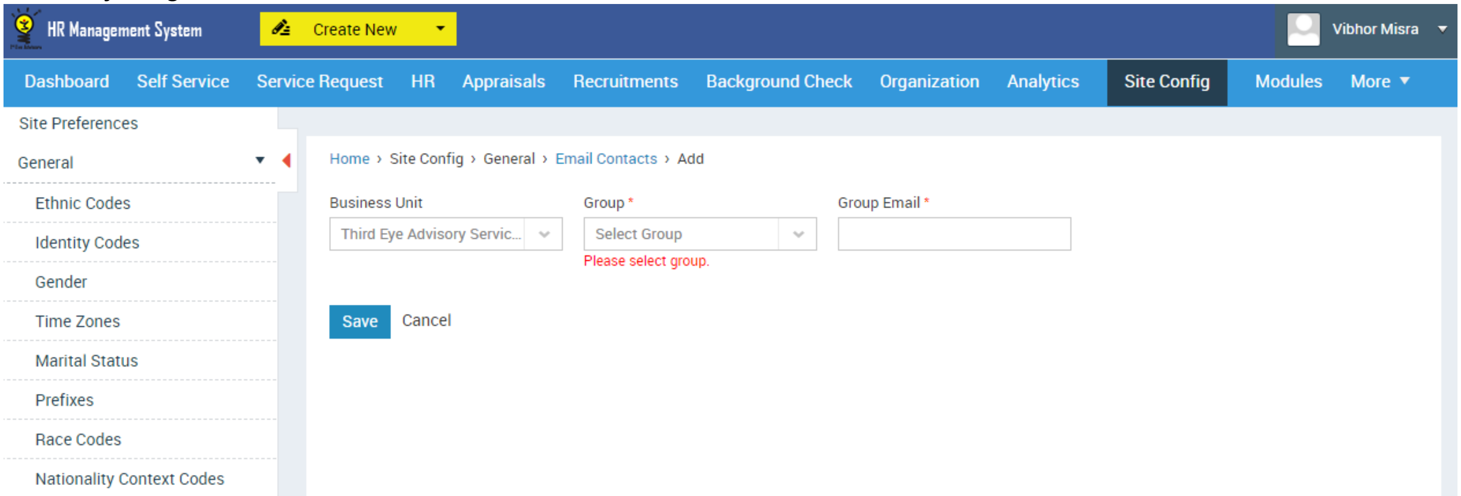


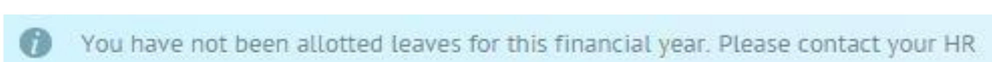
Figure 44

e. Select the Business Unit
f. Select **Leave Management Group**
g. Enter group email id
h. Click **SAVE** button

Every HR email must be unique for a Business Unit. If repeated, you will get an error message:

3.6 How do I raise a Leave Request?

Before raising a leave request, ensure that you have been allotted leaves for the current year. If you have not been allotted leave an information message will be displayed:



<u>To raise a leave request:</u>

Please refer Figure 45

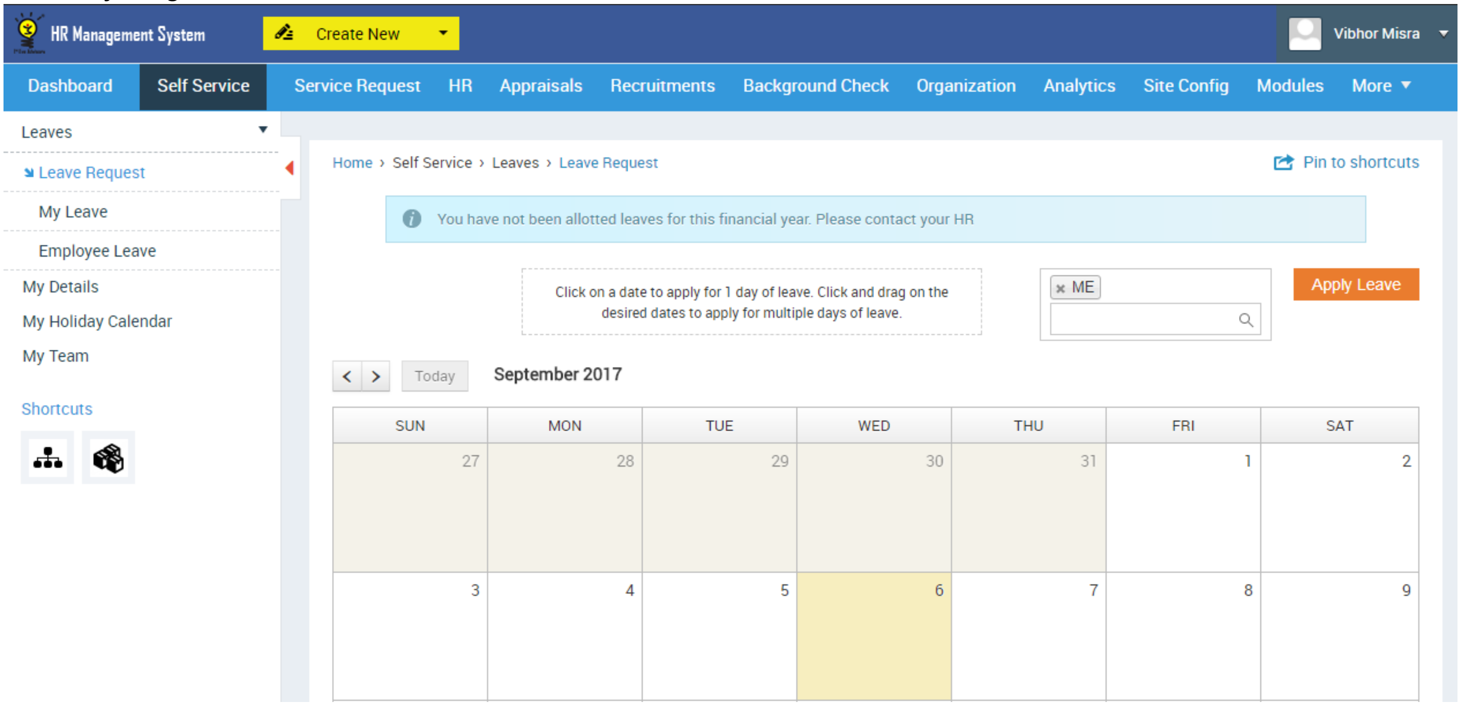


Figure 45

a. Click **Self Service** in the top menu
b. Click **Leave Request** in the submenu
c. The current month calendar will be displayed on the right side panel
d. Click on previous and next arrow buttons to move to previous or next month
e. Click **Apply Leave** to apply leave for the current day
f. Click on any date on the calendar plugin to apply for a day's leave
g. Click and drag on the dates to apply for a long leave (multiple days)

After **e/f/g** a small window **'Create: Leave Request'** will open.

Please refer Figure 46

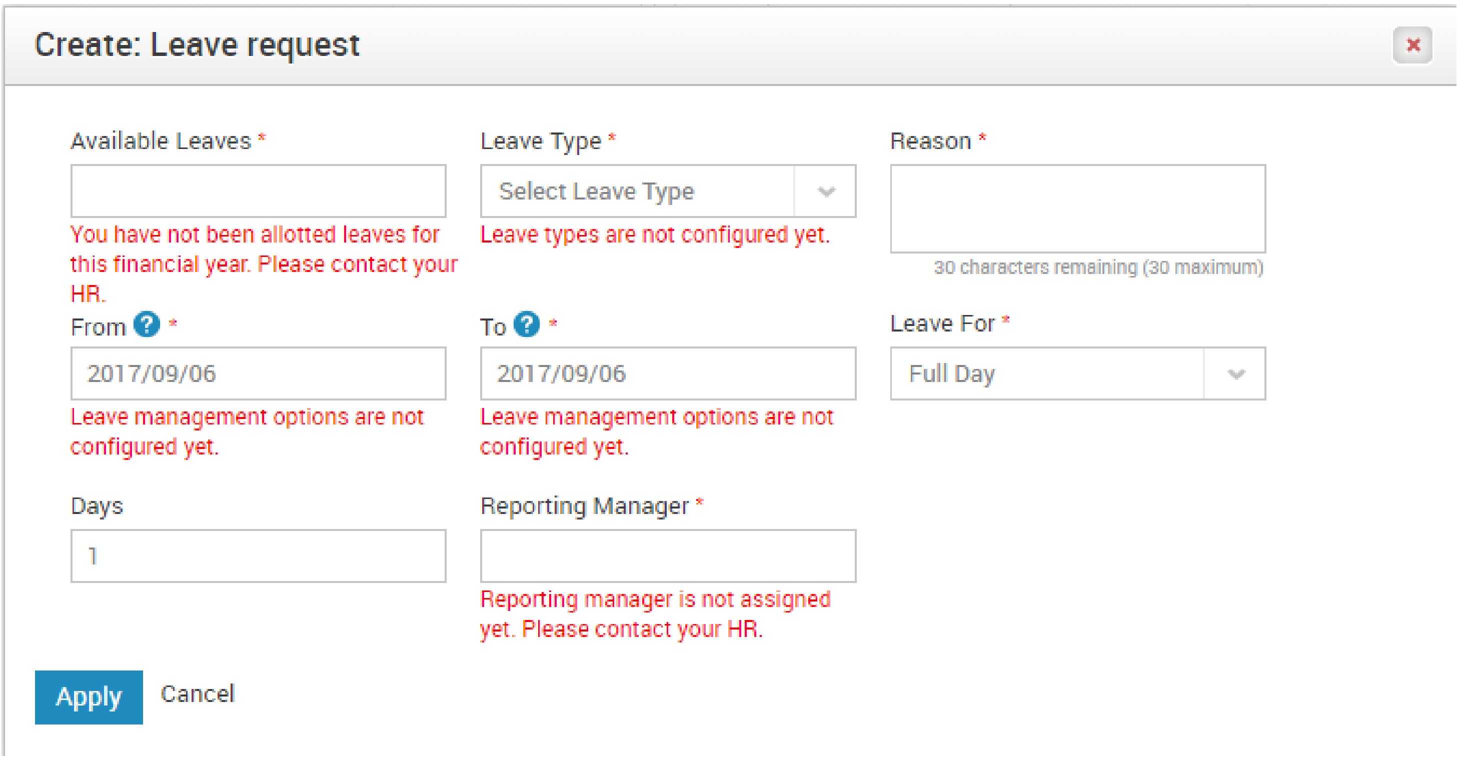


Figure 46

h. Enter the required details
i. Click **APPLY** button

Leave requests will be displayed in 'Pending Leaves' until an action is performed by the reporting manager

Please refer Figure 47

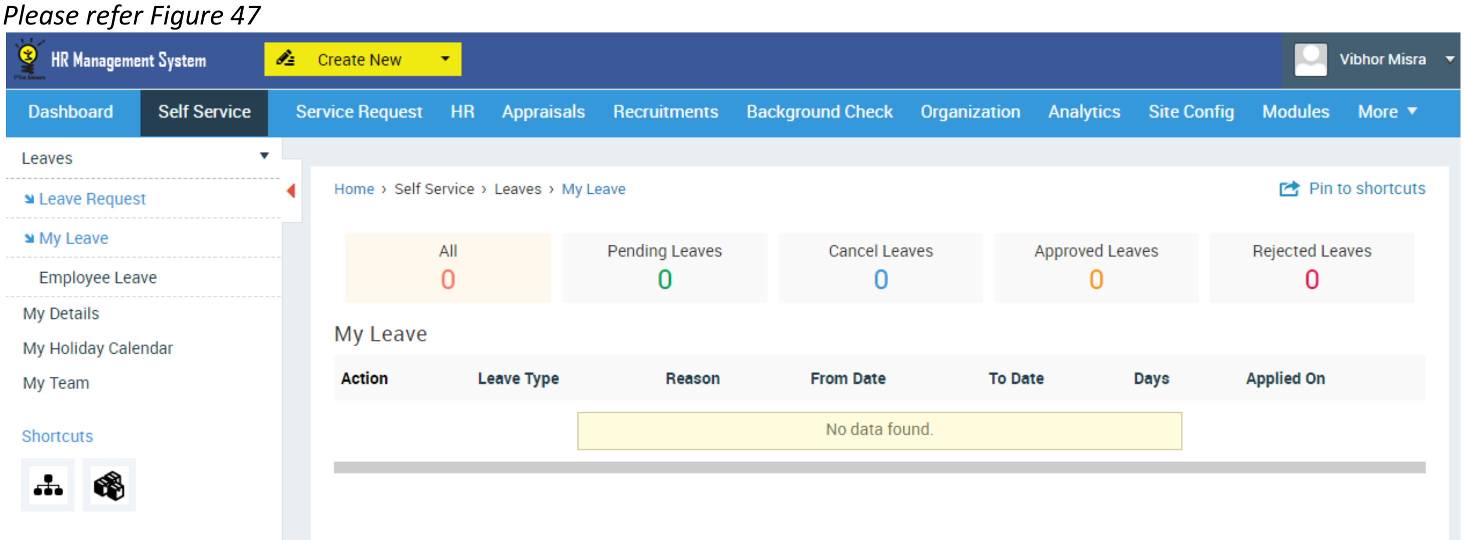


Figure 47

3.7 How do I cancel a Leave Request?

Employees can cancel an unapproved leave request at any time. Once a leave request has been approved, they can cancel it only **ONE DAY BEFORE** the actual leave date. Managers can cancel approved leaves at any time.

Employee

Please refer Figure 48

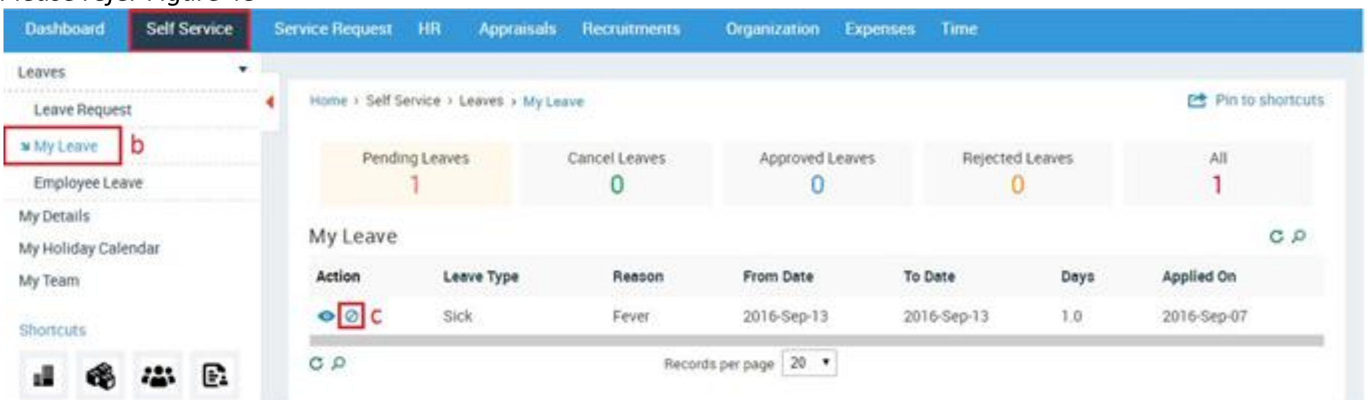


Figure 48

a. Click **Self Service** in the top menu bar
b. Click **My Leave** in the submenu
c. Click **Cancel** icon in the Action column

A confirmation message will be displayed

Please refer Figure 49

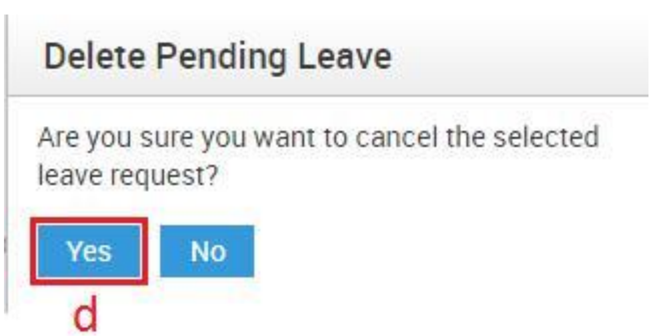


Figure 49

d. Click **Yes** button to cancel the leave

You can view your cancelled leaves in **Self Service > Leaves > My Leaves > Cancelled Leaves**

Manager

Please refer Figure 50

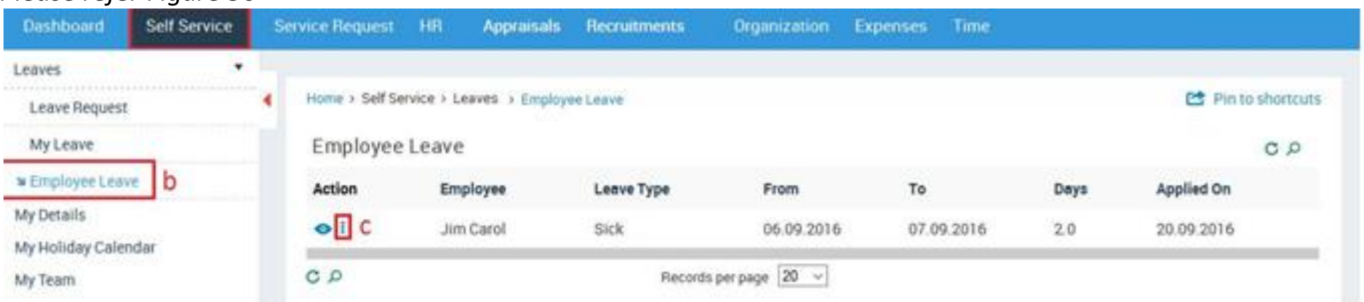


Figure 50

a. Click **Self Service** in the top menu bar
b. Click **Employee Leave** on the left side panel
c. Click **More Action** button in the Action column

A small pop up window will open.

Please refer Figure 51

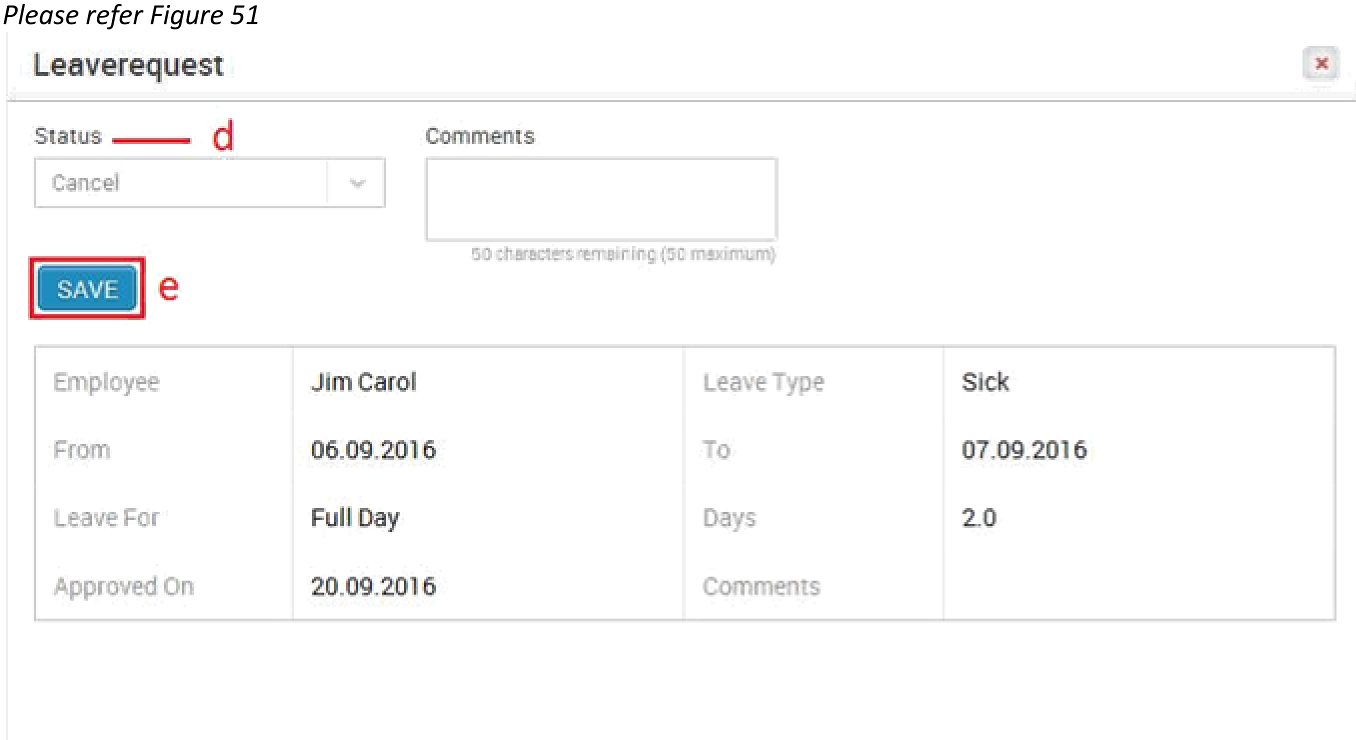


Figure 51

d. Select Cancel
e. Click **SAVE** button

3.8 How do I Approve/Reject an Employee’s Leave Request?

The HR and Employees’ reporting managers will have the privilege to approve/reject leave requests.

Please refer Figure 52

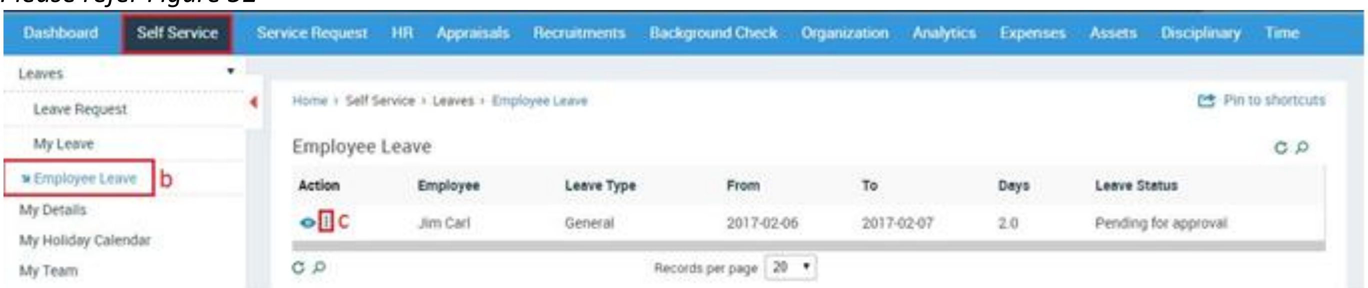


Figure 52

a. Click **Self Service** in the top menu
b. Click **Employee Leave** in the submenu
c. Click **More Actions** button in the Action column

A small pop up window will open.

Please refer Figure 53

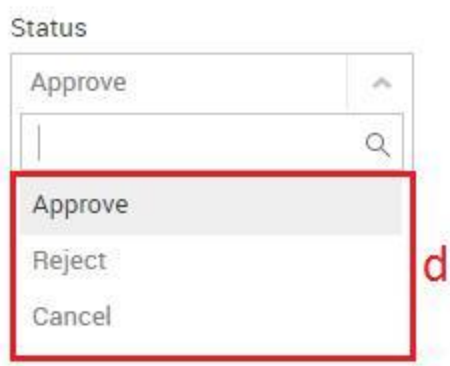


Figure 53

d. Select the status

Click SAVE button to complete the selected action.

3.9 How do I view the Approved Leaves and Leave Requests of all the Employees Reporting to Me?

Reporting Manager can view the approved leaves and leave requests of all the employees reporting to them by using the calendar plugin.

Please refer Figure 54

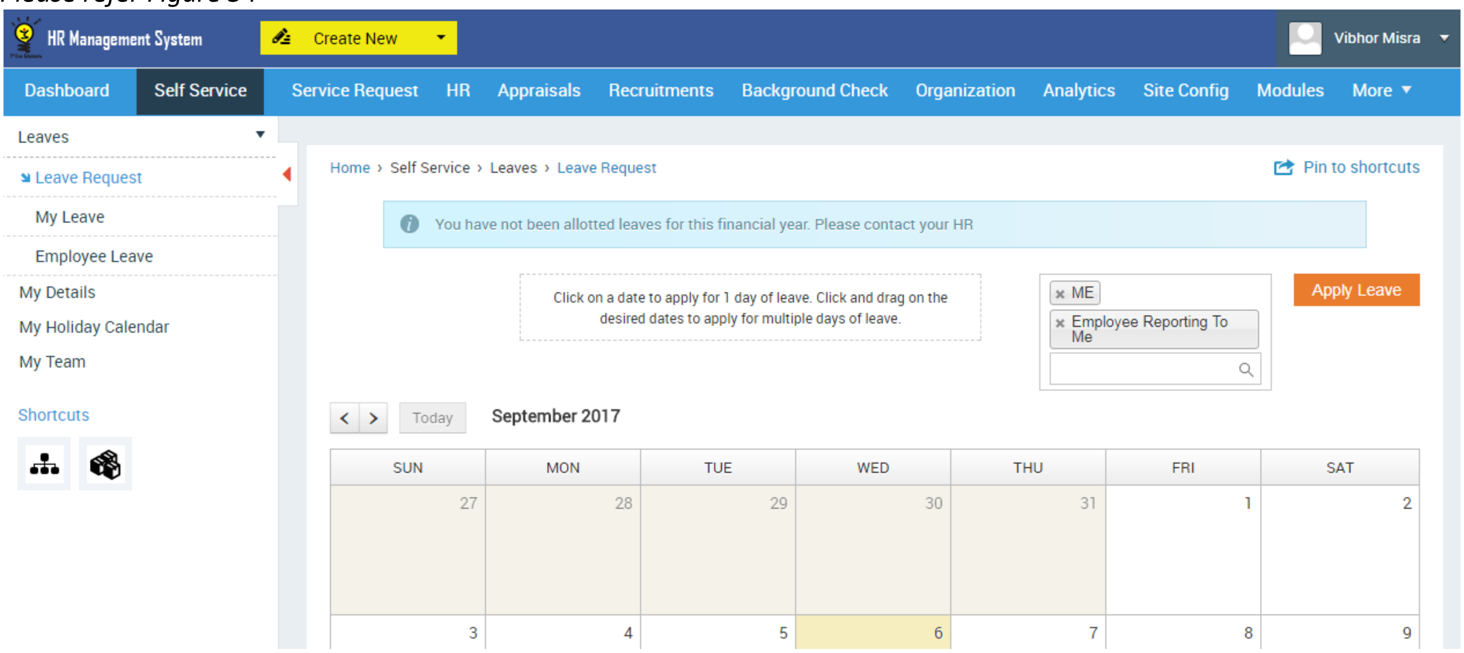


Figure 54

a. Click **Self Service** in the top menu
b. Click **Leave Request** in the submenu
c. Select the option 'Employee reporting to me'

For the day(s) on which employees have taken leave(s) or raised leave request(s), a horizontal bar having the employee's name on it will be displayed across the dates.

Please refer Figure 55

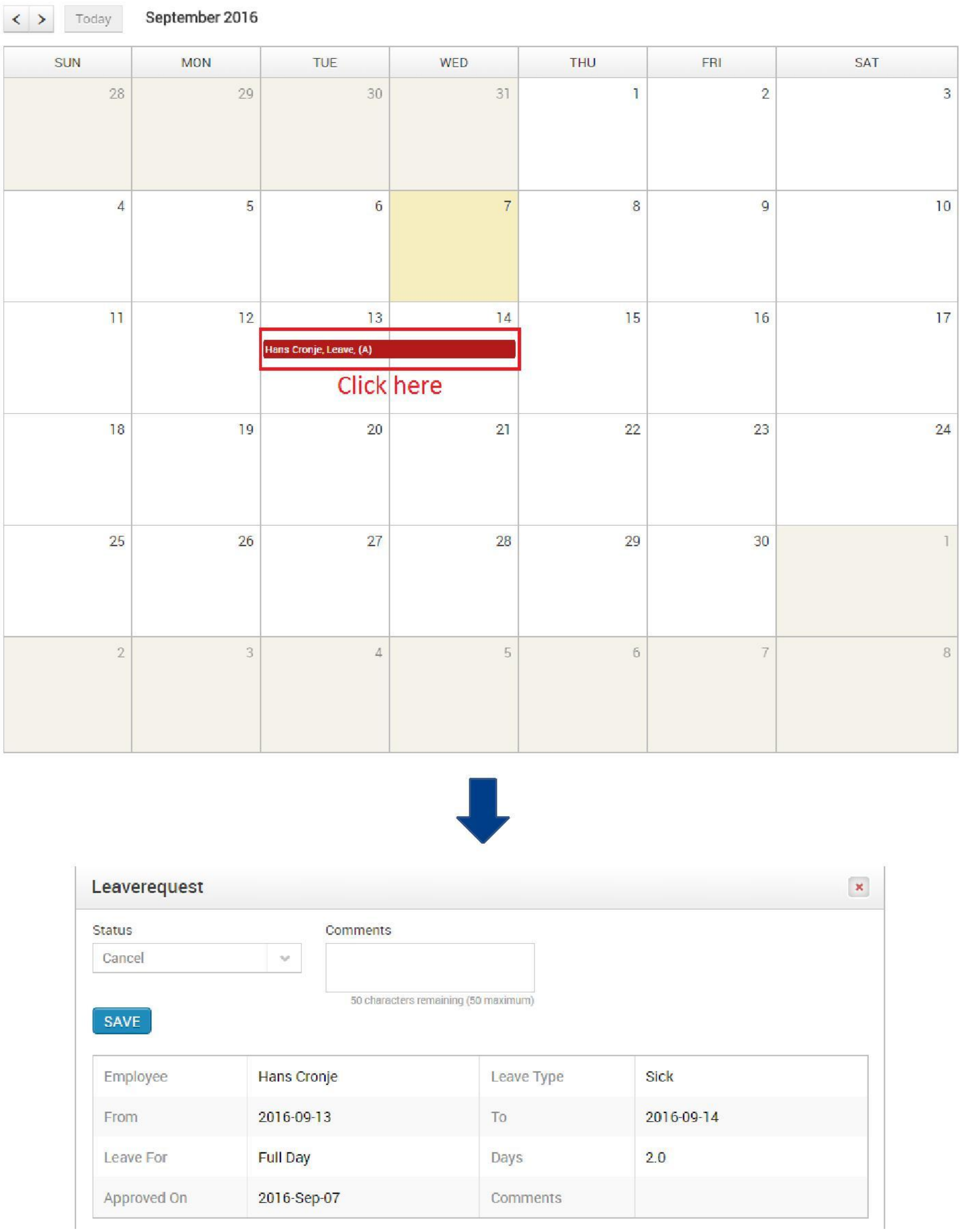


Figure 55

3.10 How do I view my own Leave(s)/Leave Request(s)?

Please refer Figure 56

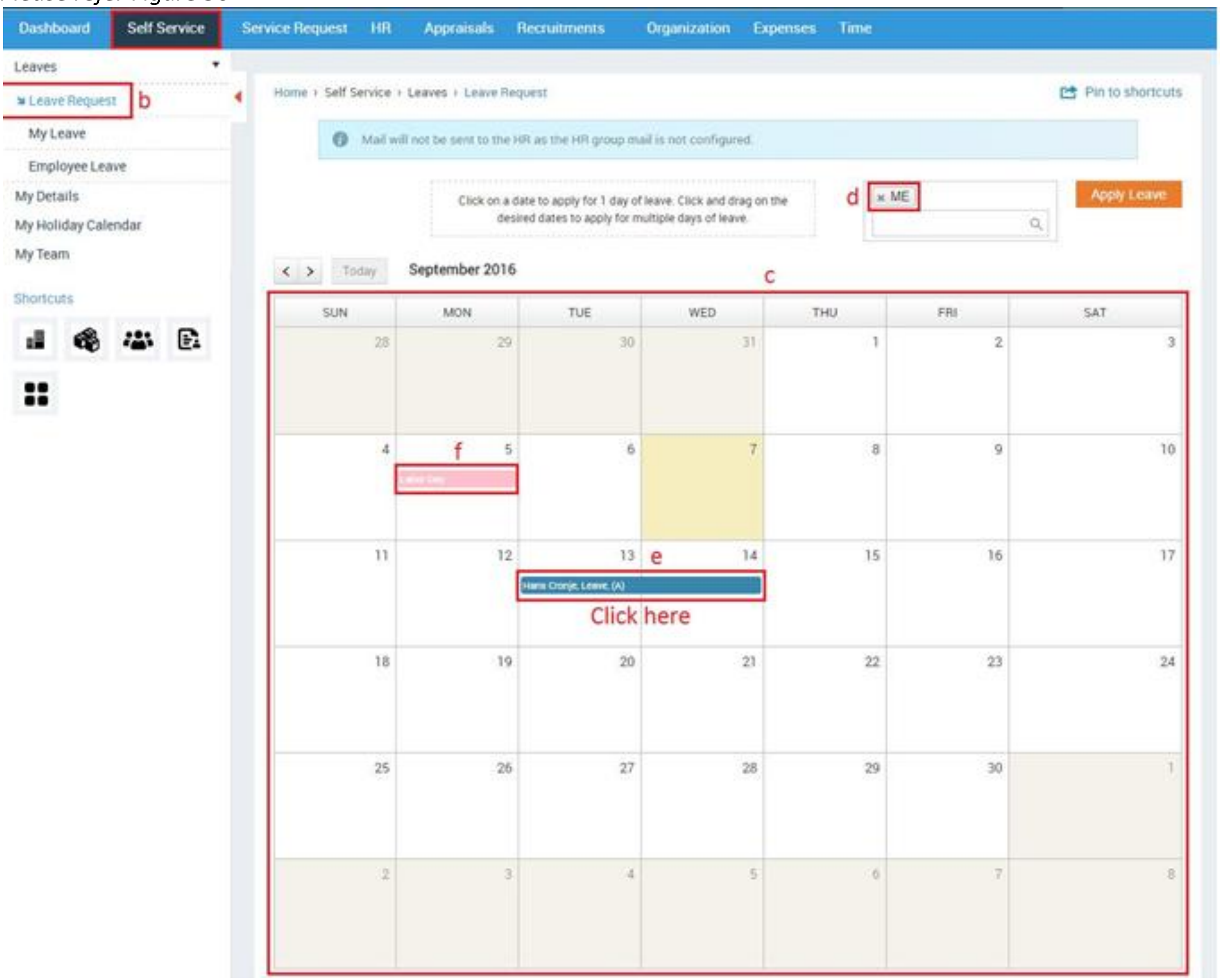


Figure 56

a. Click **Self Service** in the top menu
b. Click **Leave Request** in the submenu
c. A calendar plugin will be displayed.
d. Select the option 'Me' (It will be selected by default)
e. For the day(s) on which you have taken leave(s)/raised leave request(s), a horizontal bar will displayed across those dates.
f. You can also see holidays

Your leaves requests will be categorized in to 5 types:

- Pending Leaves
- Canceled Leaves
- Approved Leaves
- Rejected Leaves
- All

Please refer Figure 57

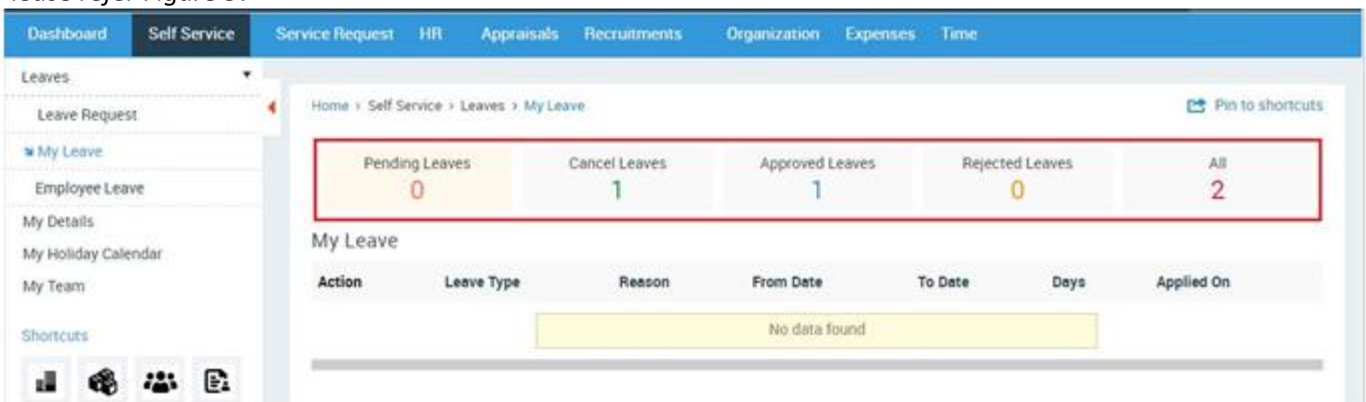
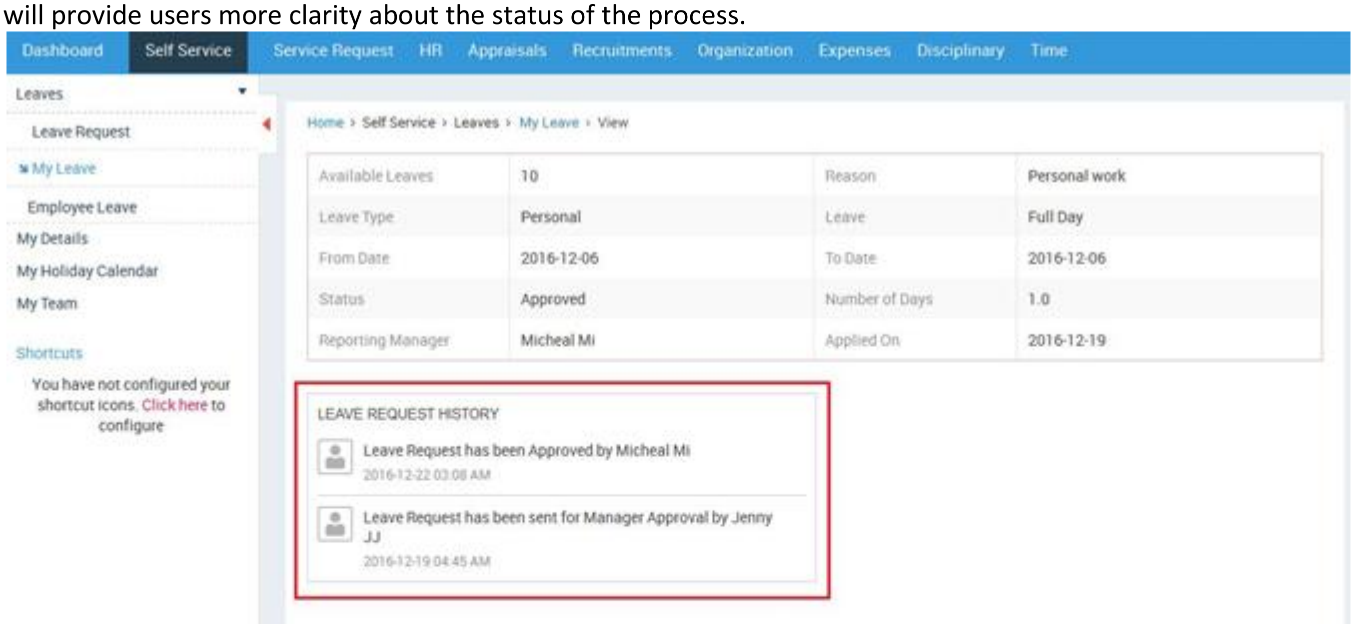


Figure 57

Click on any category to view the leaves accordingly.

An activity log will be displayed for every action performed by user(s) involved in a Leave Management Cycle. This will provide users more clarity about the status of the process.



3.11 How do I create Holiday Groups?

Holiday Groups are useful for organizations having teams located in different countries or which follow different holiday calendars.

Please refer Figure 58

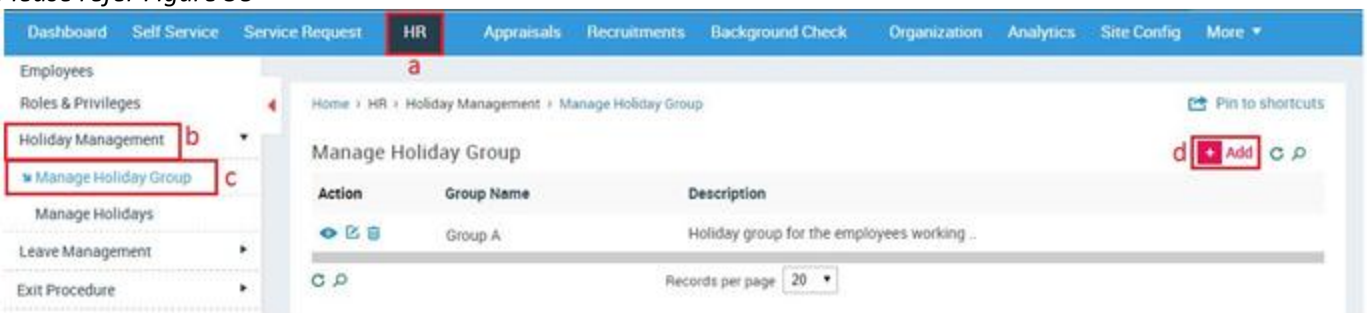


Figure 58

a. Click **HR** in the top menu
b. Click **Holiday Management** on the left menu panel
c. Click **Manage Holiday Group** in the submenu
d. Click **+Add** button

Please refer Figure 59

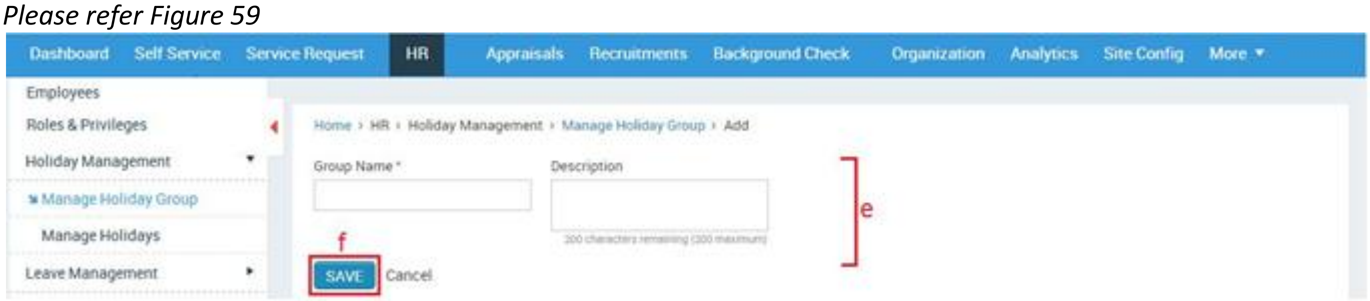


Figure 59

e. Enter the required details
f. Click **SAVE**

3.12 How do I create Holidays?

Please refer Figure 60

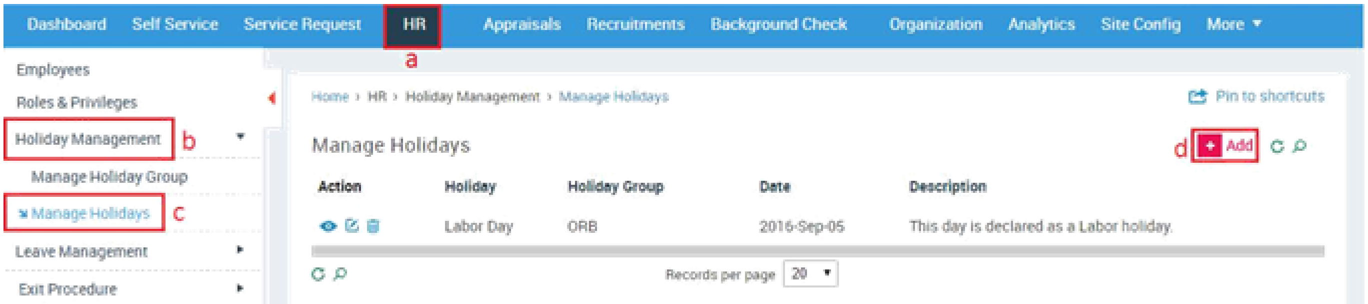


Figure 60

a. Click **HR** in the top menu
b. Click **Holiday Management** on the left menu panel
c. Click **Manage Holidays** in the submenu
d. Click **+Add** button

Please refer Figure 61

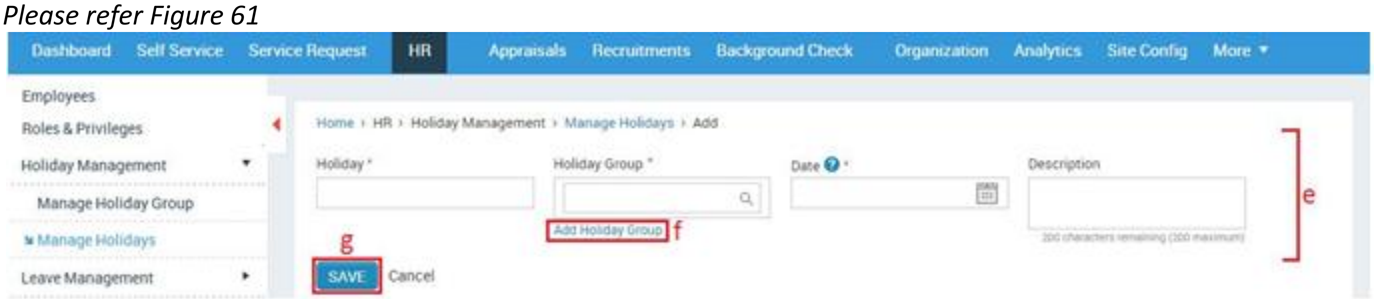


Figure 61

e. Enter the required details
f. Add a new Holiday Group
g. Click **SAVE** button

By providing a Holiday Group name, you will be assigning the Holiday to a Holiday Group.

3.13 How do I assign Holidays to Employees?

Please refer Figure 62

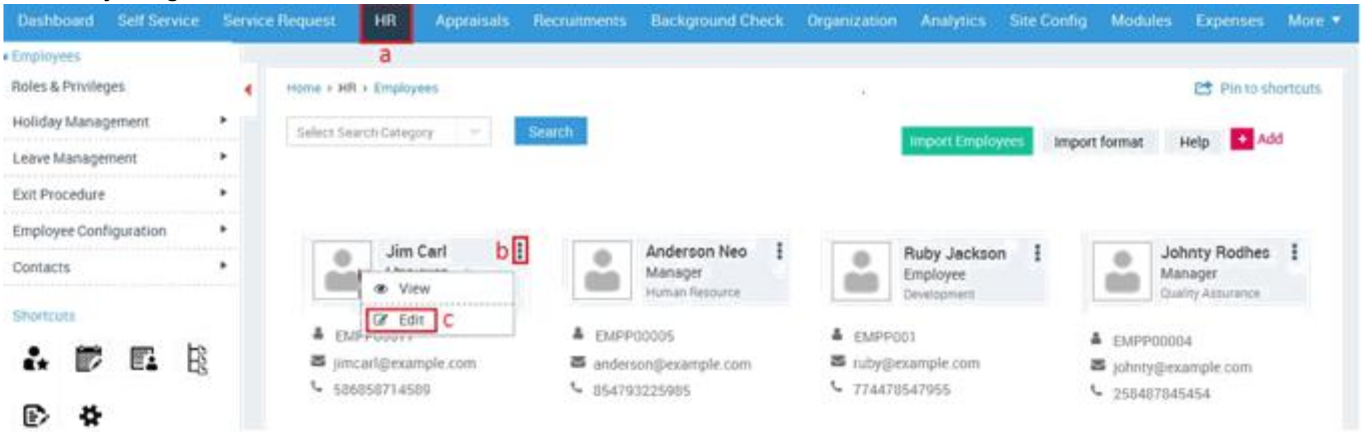


Figure 62

a. Click **HR** in the top menu
b. Click **More Actions** button in the Action column
c. Click **Edit** icon

Please refer Figure 63

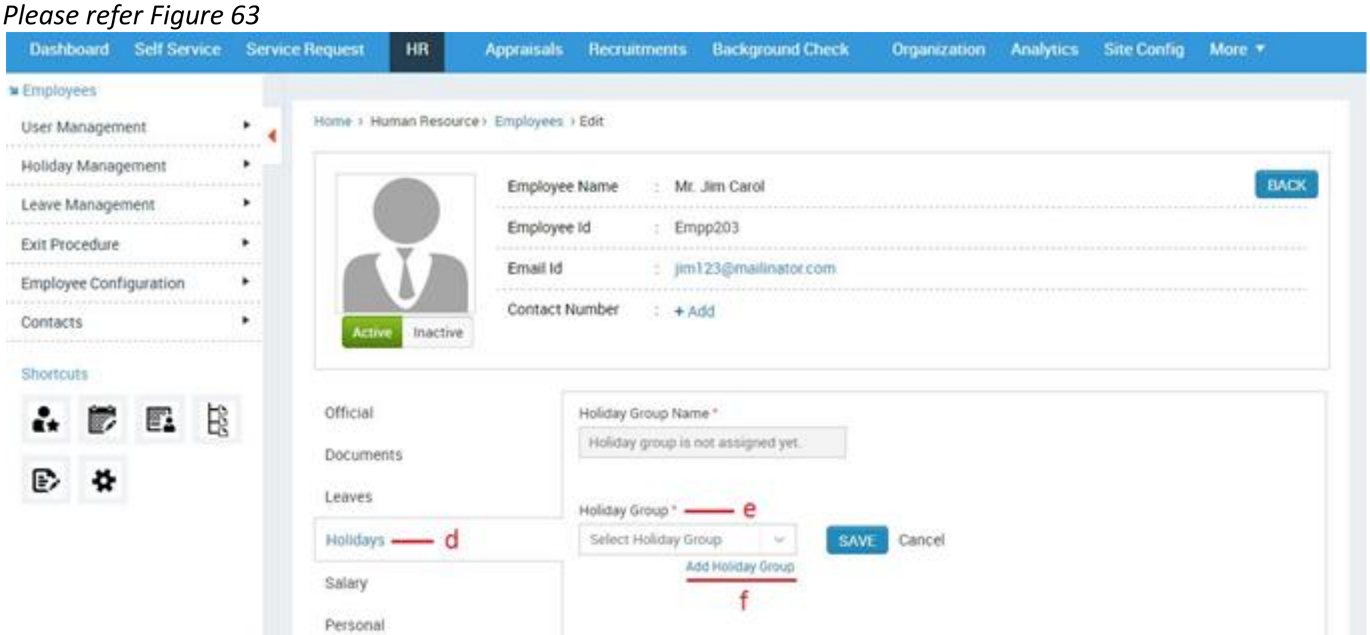


Figure 63

d. Click **Holidays** on the left menu panel (Form's left side)
e. Select a Holiday Group from the drop down option
f. Create a new Holiday Group

Please refer Figure 64

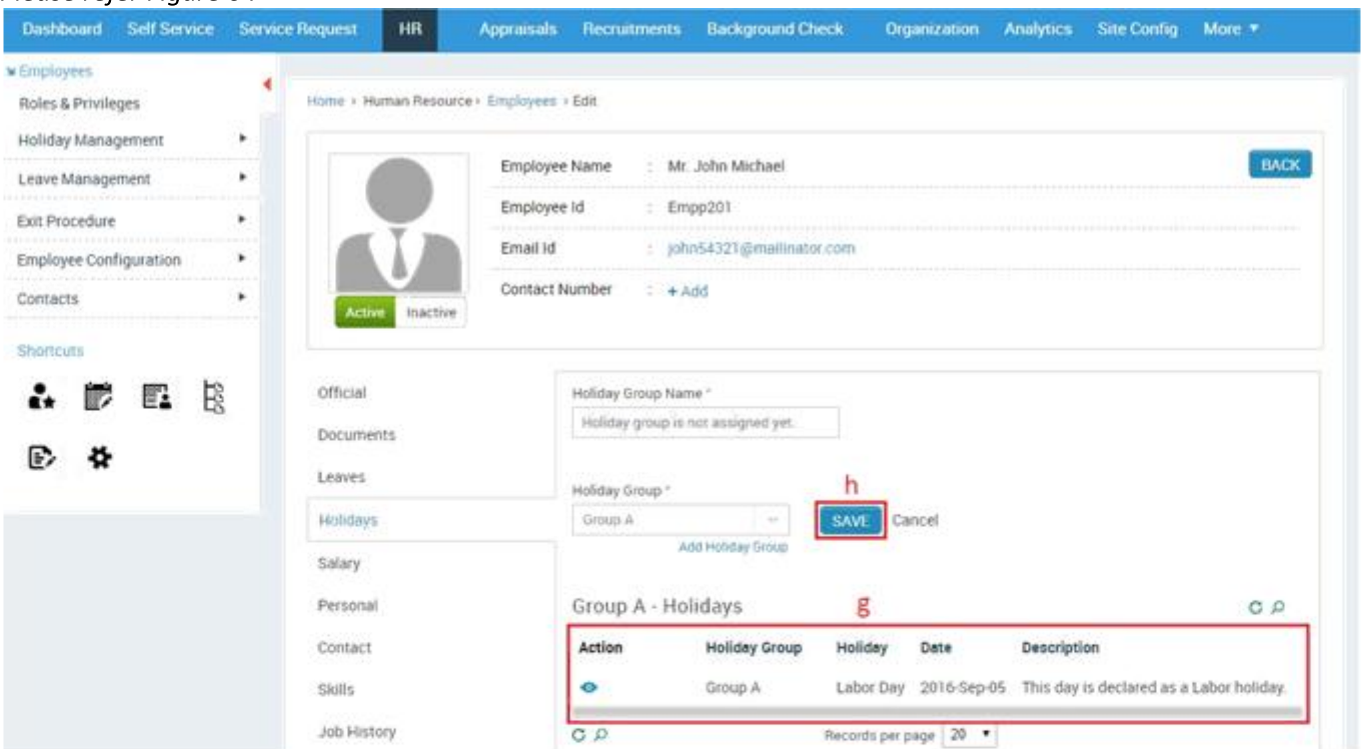


Figure 64

g. A grid containing the holidays in the holiday group will be displayed
h. Click **SAVE**

The employee will now be able to see holidays on the calendar plugin.

4. Self Service

Self-Service enables you to raise and handle leave requests. You can access your personal information, documents and leave details. You can also check the details of the employees working in your team. A Manager has the privilege to add Employees to HRMS, provided he/she is their reporting manager.

4.1 Leave Requests

Please refer to *Section* 3.4 - 3.8 (3.Leave Management).

4.2 How do I view My Details?

Please refer Figure 65

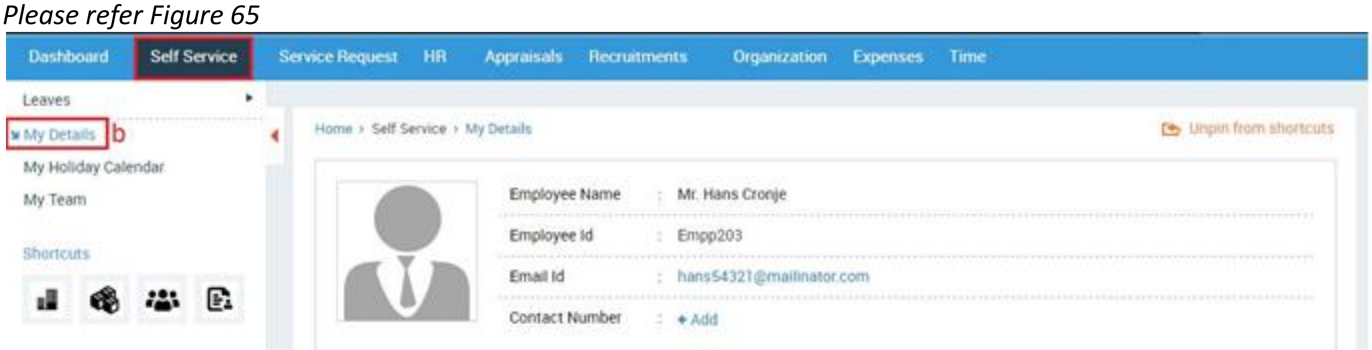


Figure 65

a. Click **Self Service** in the top menu
b. Click **My Details** on the left menu panel

Only the Super Admin/Management/HR has the privilege to add/edit all employees' details.

Official

Please refer Figure 66

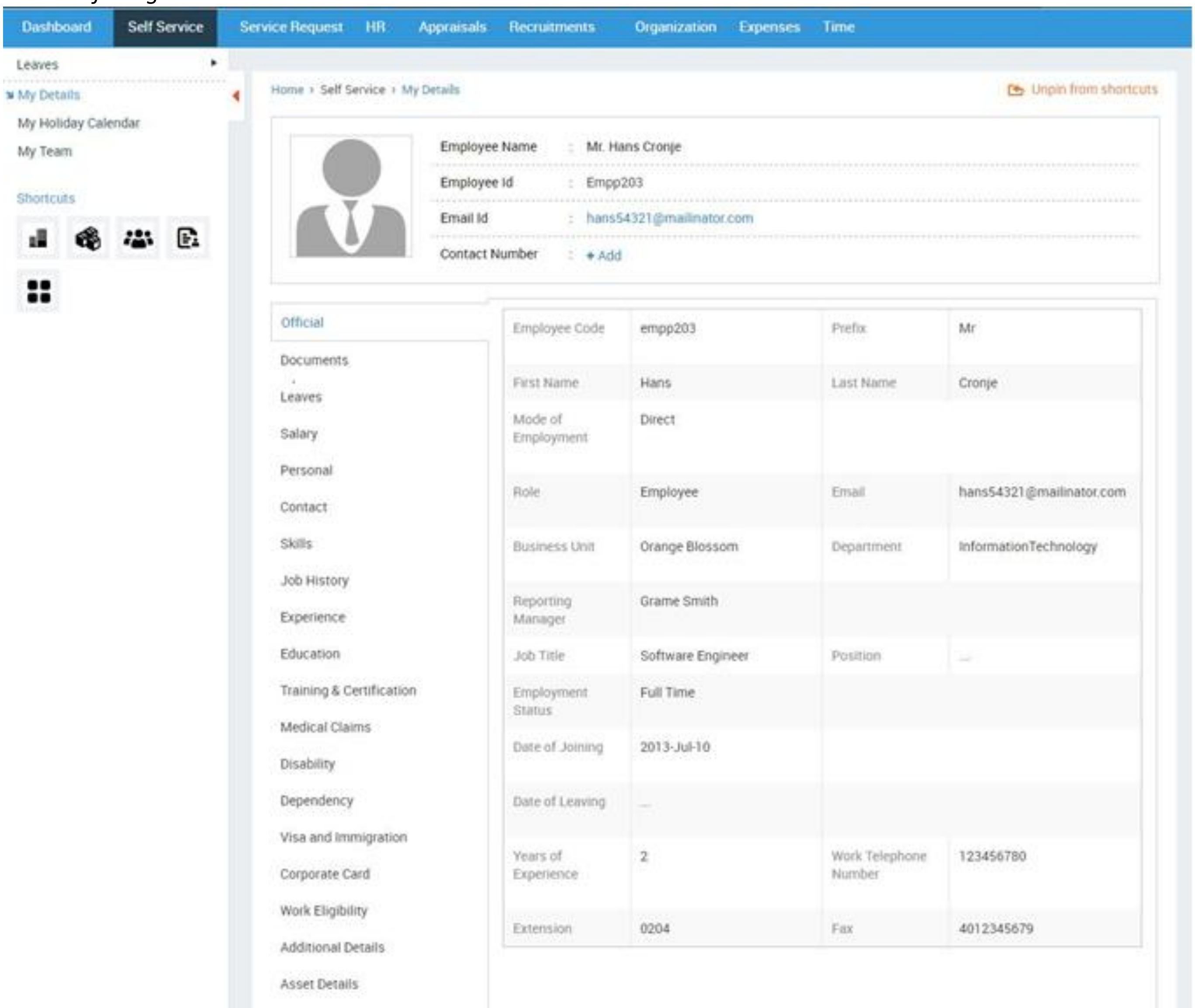


Figure 66

This option displays all your official details such as Employee ID, Email, and Business Unit etc. You cannot edit/add any detail **except** your contact number.

Documents

Please refer Figure 67

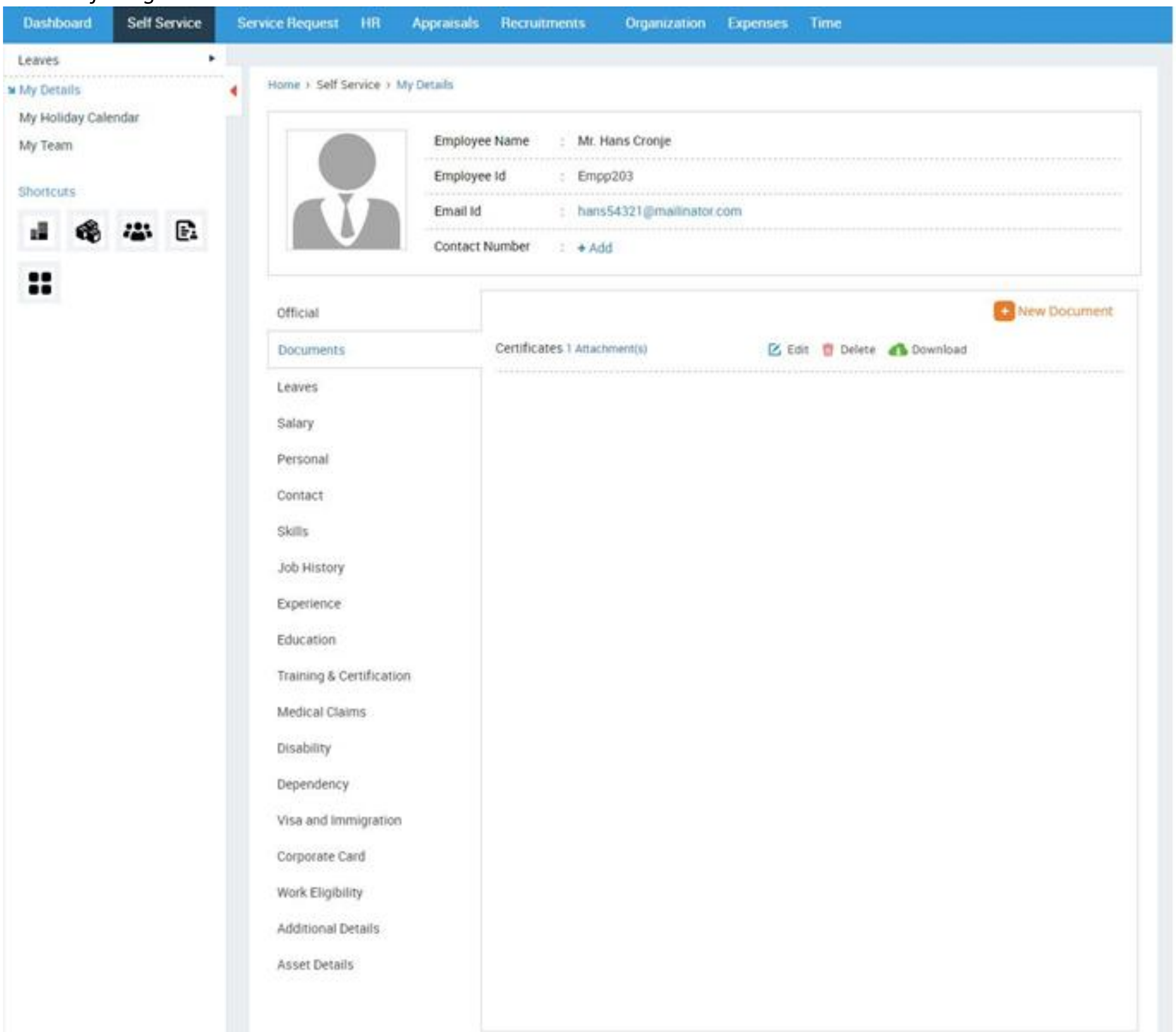


Figure 67

You can upload documents like birth certificate, degree certificate, tax proof documents etc.

Leaves

Please refer Figure 68

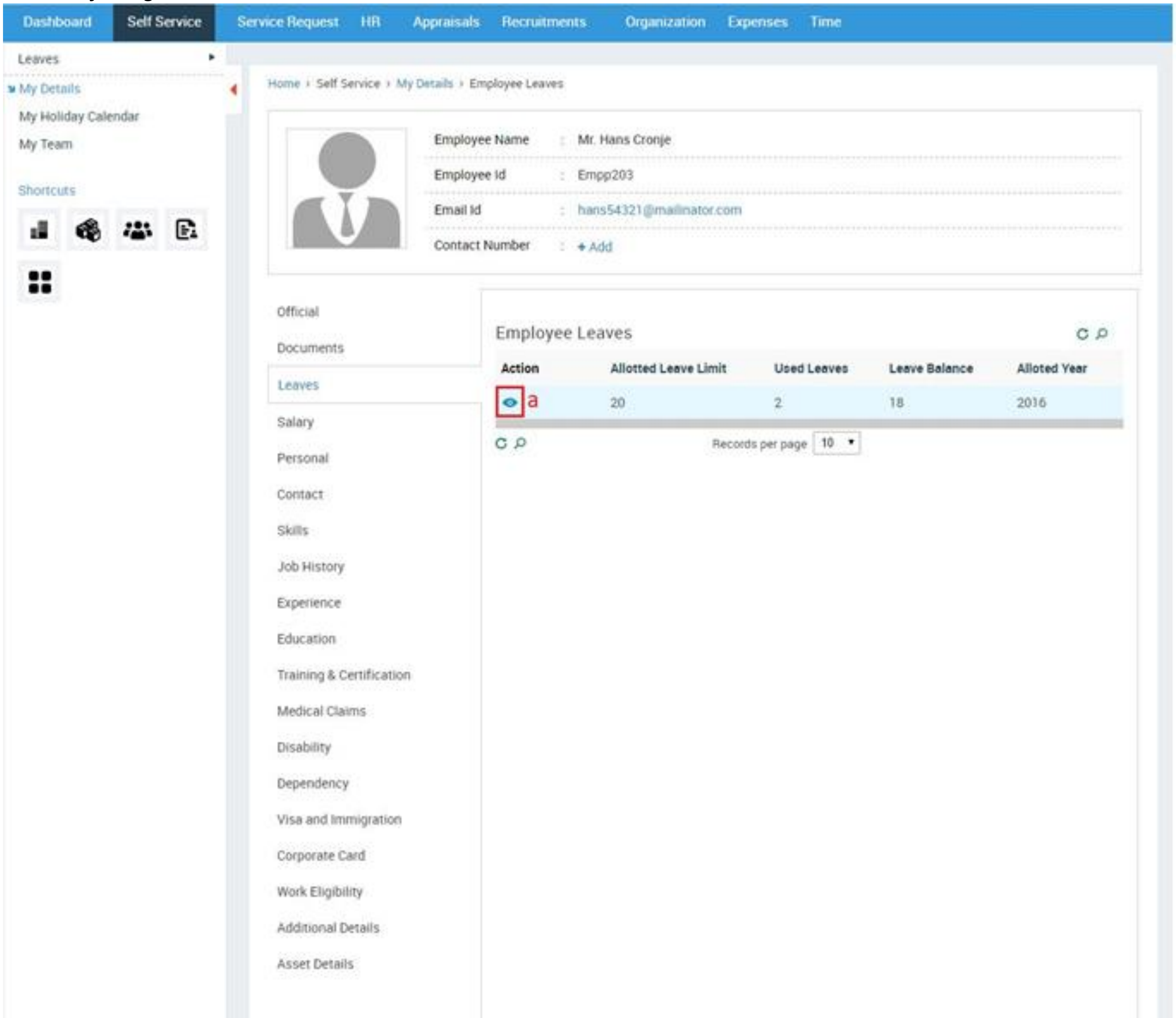


Figure 68

You can view the leave limit, number of used leaves and the leave balance for a particular year.

a. Click the view icon to check the break-up of your leaves

Salary

Please refer Figure 69

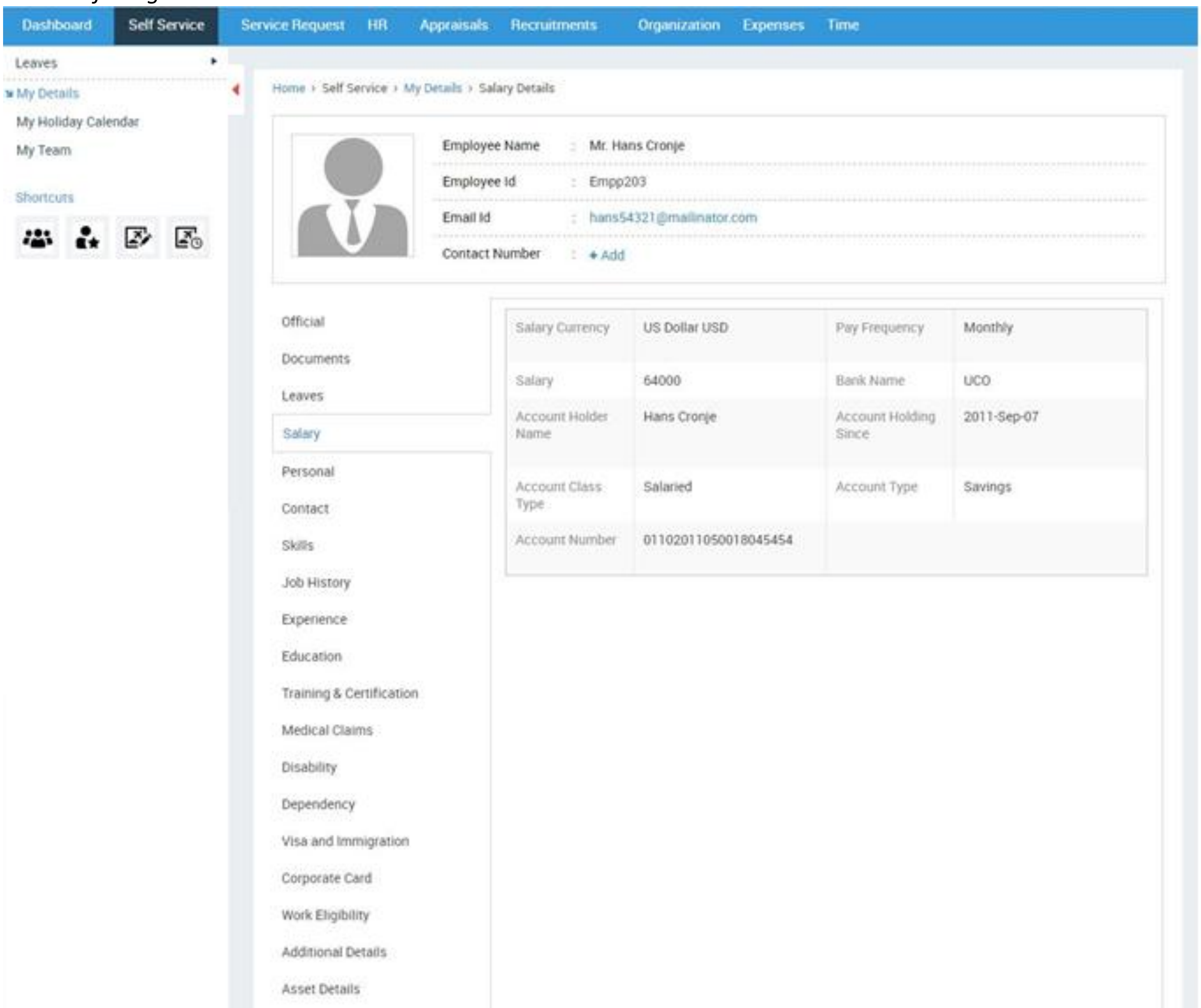


Figure 69

You can view your salary and account details.

Personal

Please refer Figure 70

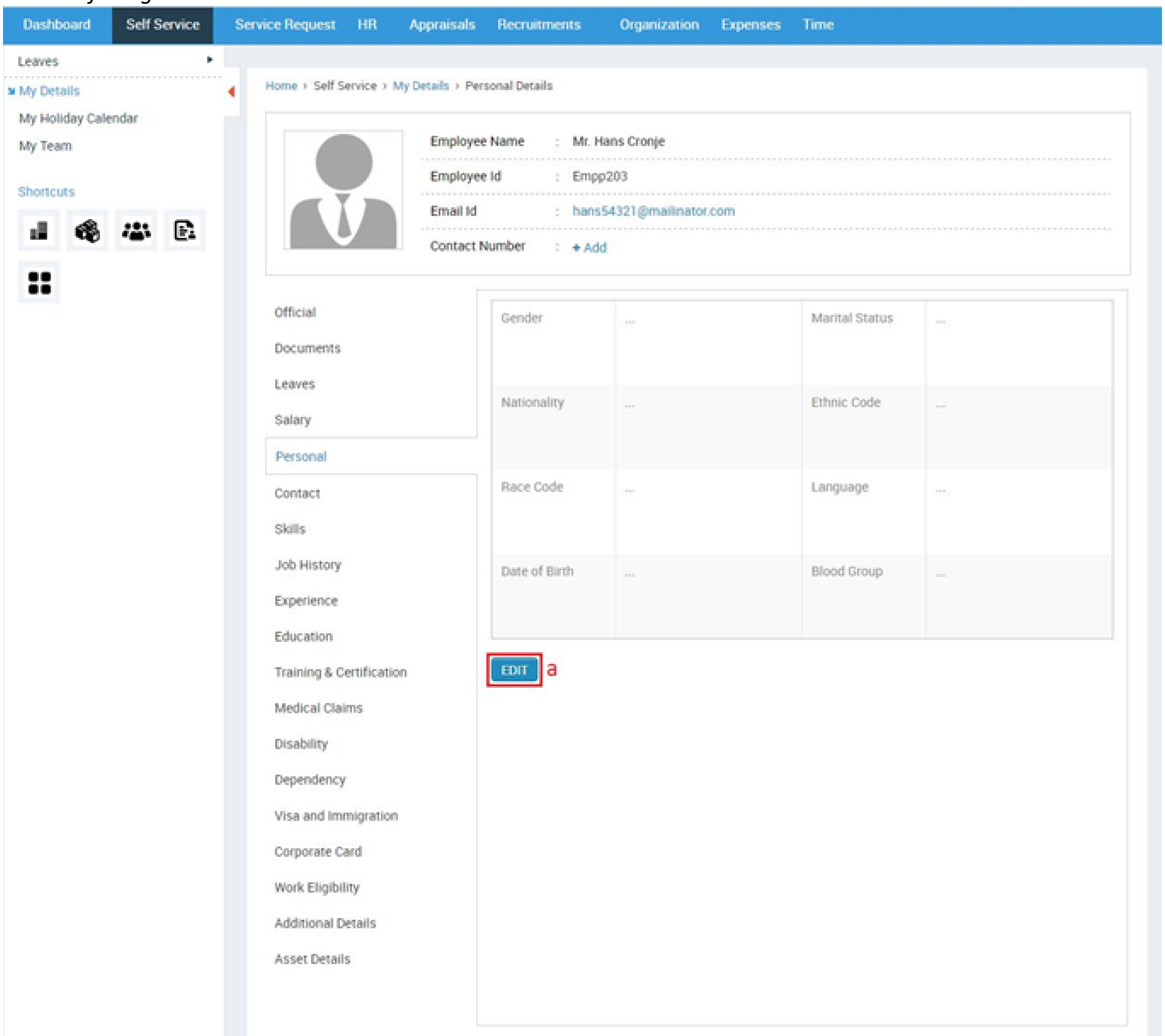


Figure 70

a. Click **Edit icon** to add or modify any details

You can add or edit details for other submenu options like **Contact**, **Skills**, **Job History**, **And Education** Etc.

The submenu options appear depending on the **Employee Configuration options** selected by the **Super Admin/Management/HR.** Please refer section 6.5 How do I add Employee Configuration tabs?

4.3 How do I view My Holiday Calendar?

Please refer Figure 71

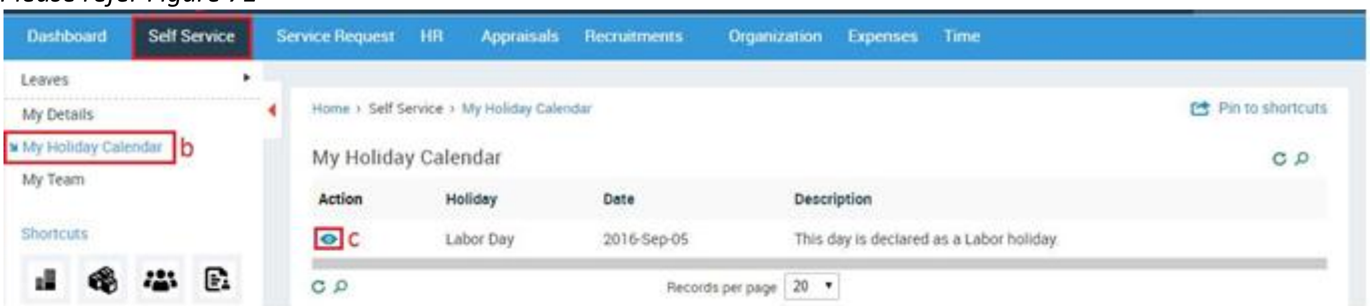


Figure 71

a. Click **Self Service** in the top menu
b. Click **My Holiday Calendar** on the left menu panel
c. Click **View** icon in the Action column to view each holiday's details

4.4 How do I view My Team details?

This option will appear only for users who have employees reporting to them.

Please refer Figure 72

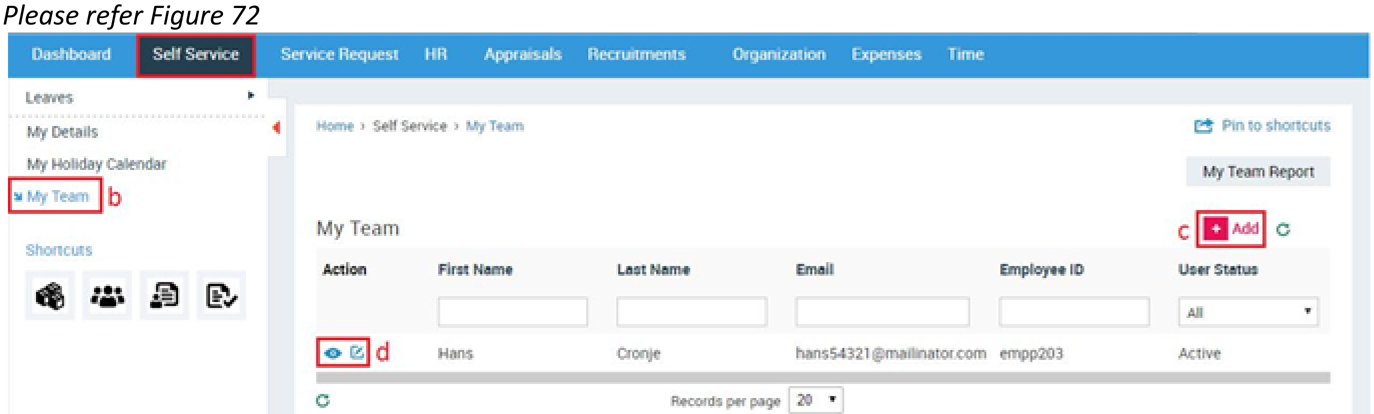


Figure 72

a. Click **Self Service** in the top menu
b. Click **My Team** on the left menu panel

c. Click **+Add** button to add an employee to your team (Refer section 1.4.2 Adding Other Employees)

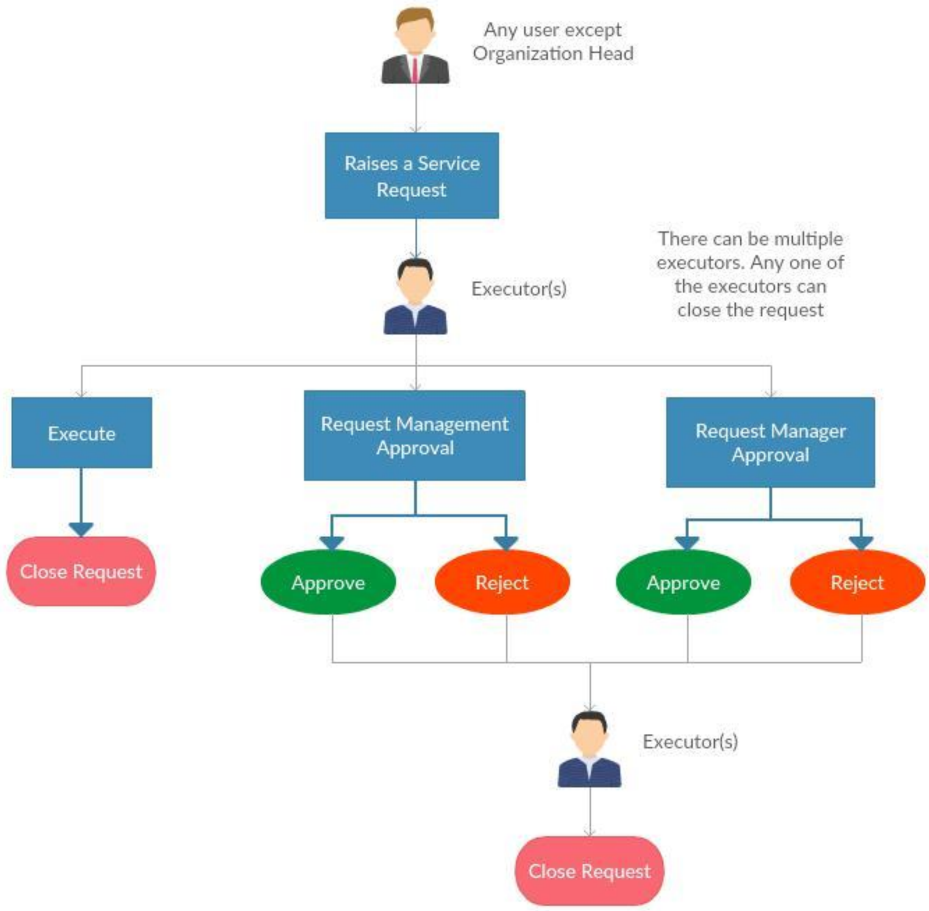
Or

d. Click **View/Edit** icon to view or edit employee details

Managers can only add employees to their team in other words they have to be the employees' reporting manager.

5. Service Request

Service Request provides access to key services and information which are required by the employees. Configure the service request workflow without coding or scripting. You can raise and handle service requests. Below is the service request process flowchart.



Description:

- A User (Any User who has a reporting manager) raises a service request.
- The Executor(s), Viewer(s) and the User will receive an email notification.
- The Executor has 3 options:
  - He/she can execute and close the service request
  - Request for Management approval
  - Request for User's manager's approval
- The actual execution takes place offline
- If the Executor has requested for either User's Reporting Manager or Management's approval, then the request will only be closed once one/both of them have approved. The Reporting Manager or Management will receive an email notification if an approval is sought from them by the executor(s).

5.1 How do I create Service Request Categories?

Please refer Figure 73

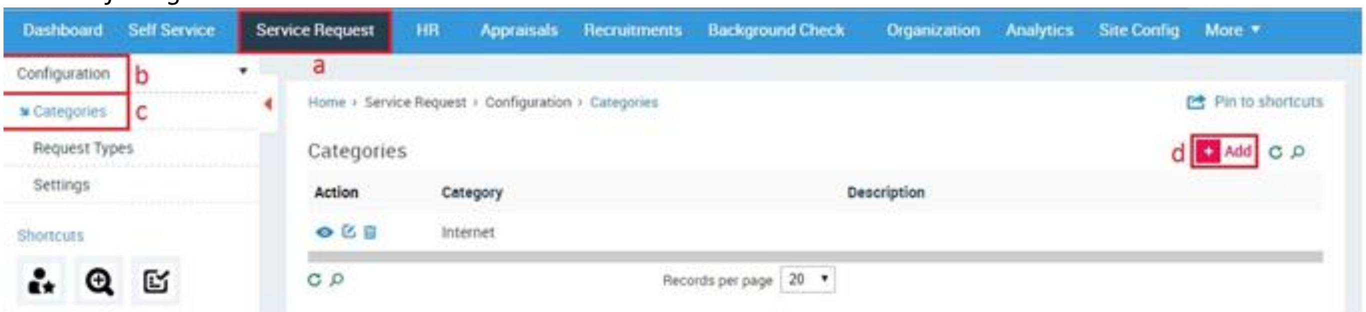


Figure 73

a. Click **Service Request** in the top menu
b. Click **Configuration** on the left menu panel
c. Click **Categories** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 74

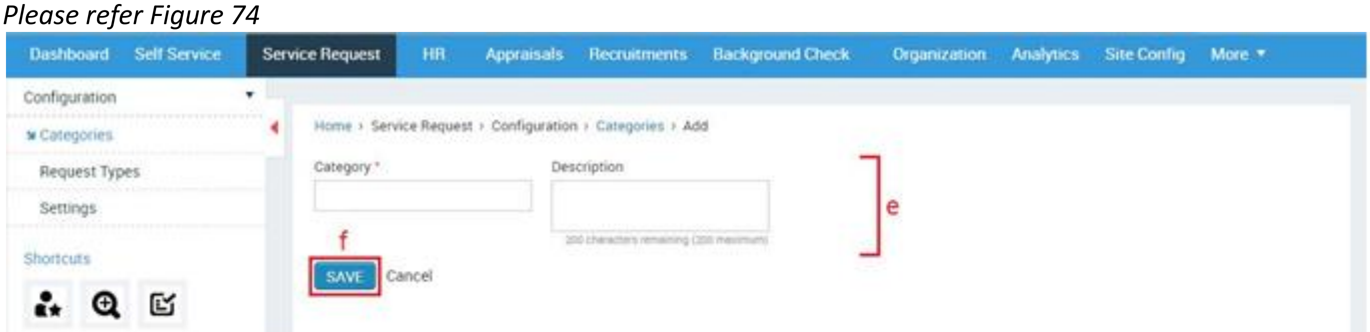


Figure 74

e. Enter the Required details
f. Click **SAVE** button

5.2 How do I create Service Request Types?

Please refer Figure 75

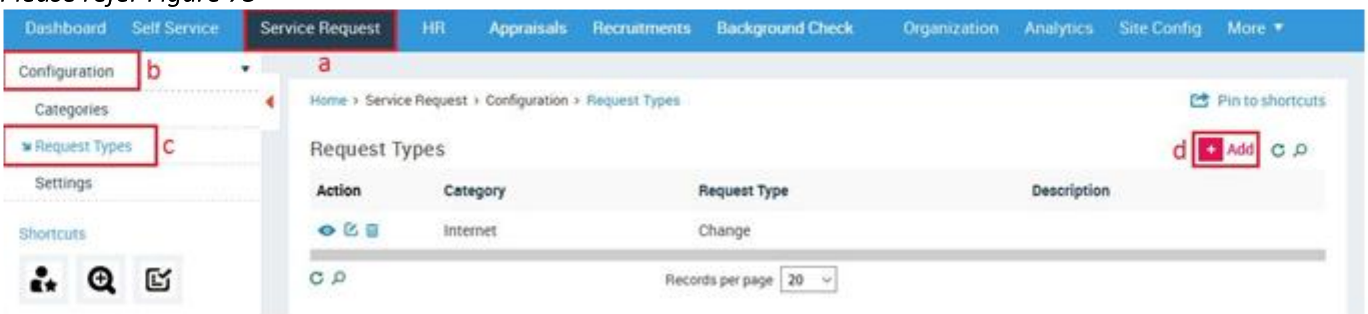


Figure 75

a. Click on the Service Request in the top menu
b. Click **Configuration** on the left side panel
c. Click **Request Type** submenu
d. Click **+Add** button on the right side

Please refer Figure 76

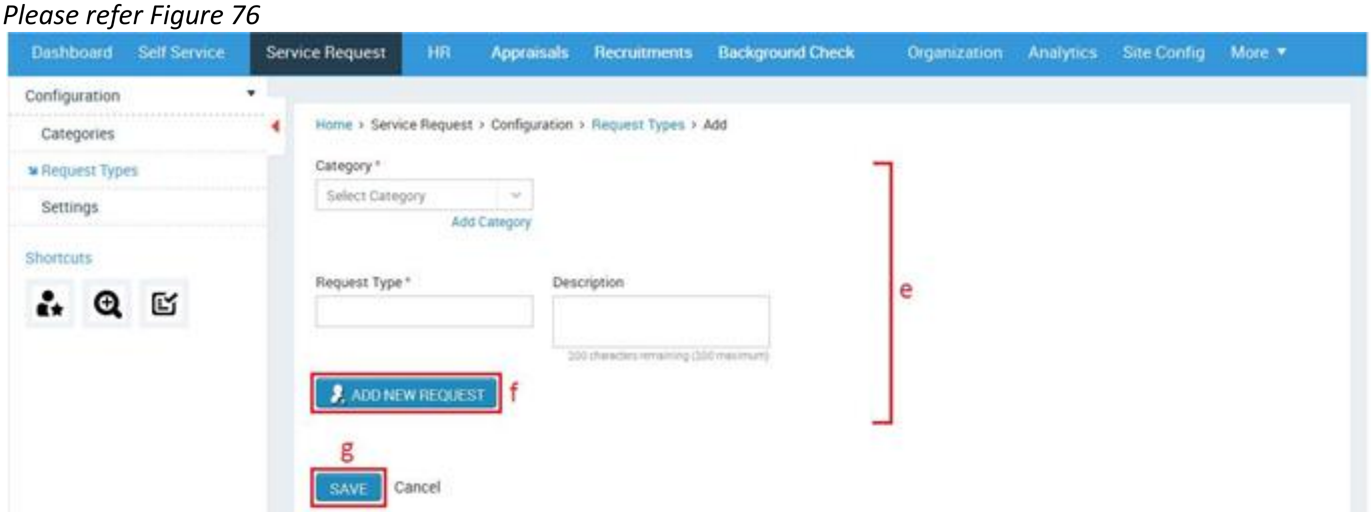


Figure 76

e. Enter the Required details
f. Click ADD NEW REQUEST to add more requests in the same category
g. Click **SAVE** button

5.3 How do I configure Service Request settings?

Please refer Figure 77

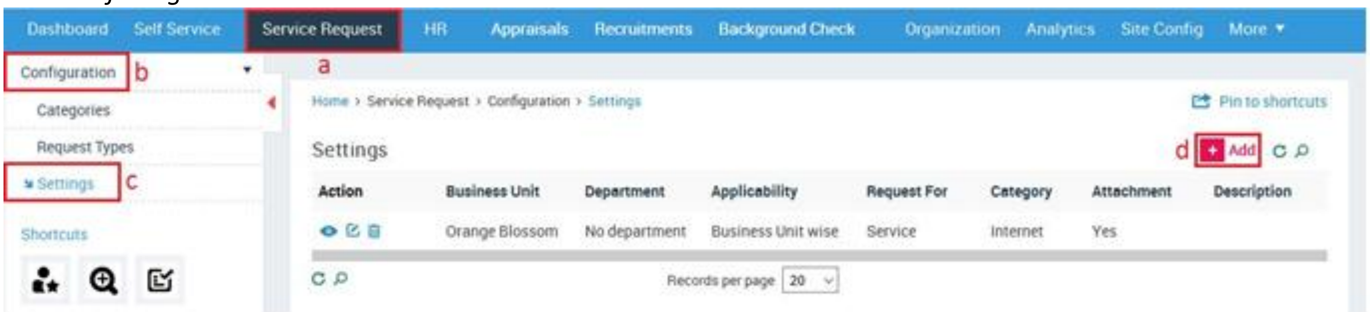


Figure 77

a. Click **Service Request** in the top menu
b. Click **Configuration** left menu panel
c. Click **Settings** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 78

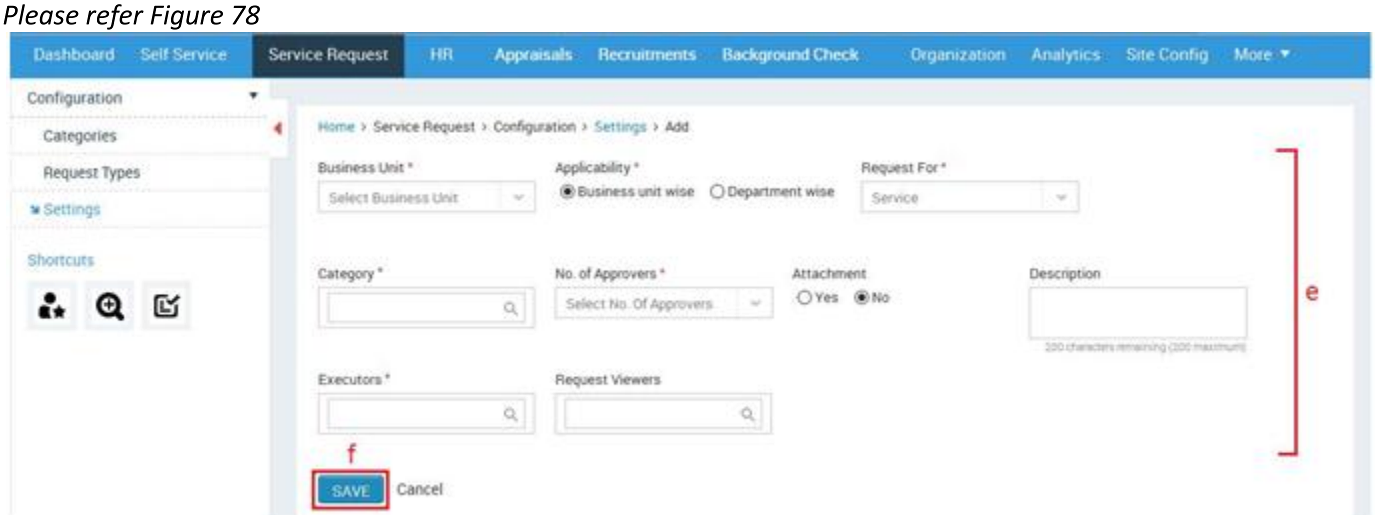


Figure 78

e. Enter the Required details
f. Click **SAVE** button

5.4 Who are Approvers, Executors and Viewers?

Approvers *Management***:** They are responsible for providing approval for service requests. Executor(s) send a request for approval to the Approver(s). You can have a maximum of 3 approvers and a minimum of 1 approver.

Executors *All roles except Management*: They are responsible for executing the service request. The actual execution takes place offline. You can have any number of executors.

Request Viewers *All roles except Management*: They don't have any responsibility in the service request process. They can only view the actions taken by the executors and approvers via email notifications. You can have any number of viewers.

5.5 How do I raise a Service Request?

Please refer Figure 79

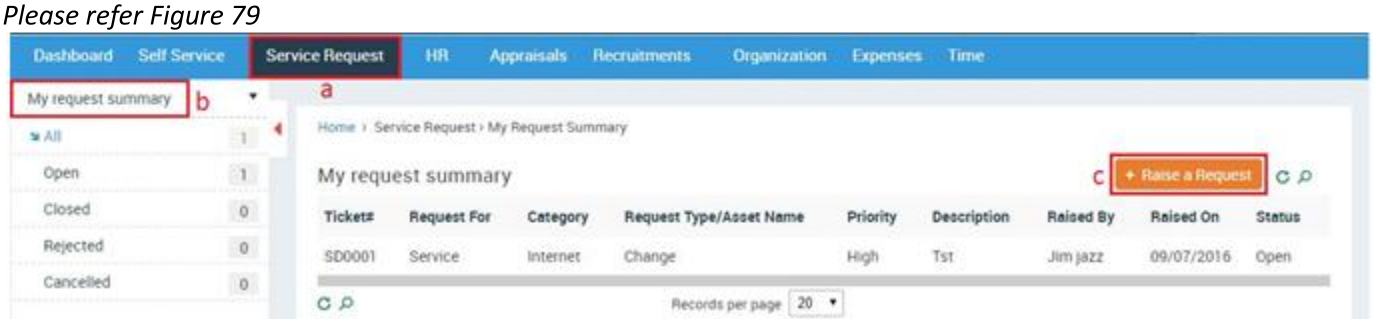


Figure 79

a. Click **Service Request** in the top menu
b. Click **My request summary** on the left side panel
c. Click **+Add** button on the right side

Please refer Figure 80

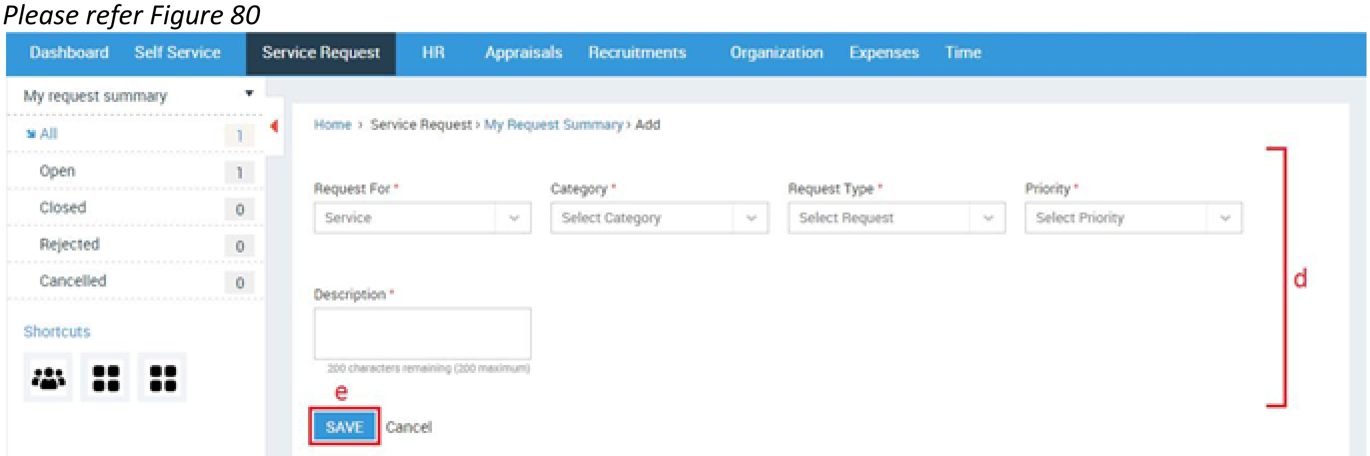


Figure 80

d. Fill in the required details
e. Click **SAVE** button

5.6 How do I view my Service Requests?

Please refer Figure 81

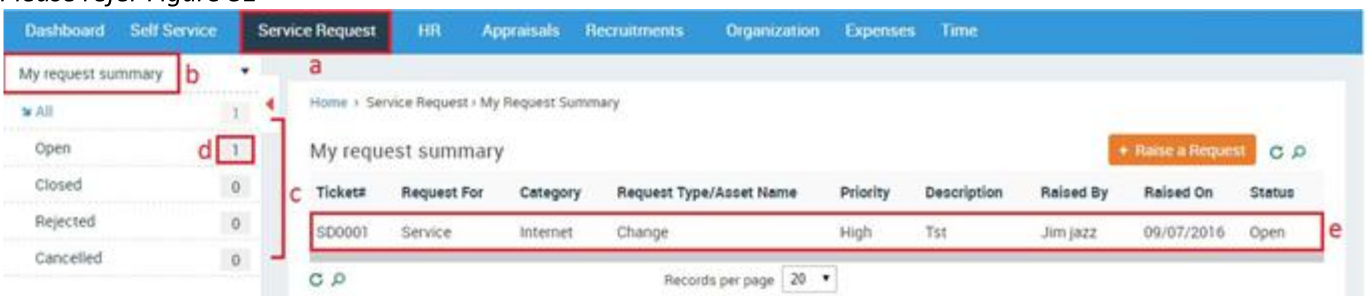


Figure 81

a. Click **Service Request** in the top menu
b. Click **My request summary** on the left menu panel

Service Requests have been categorized on basis of their statuses:

- All
- Open
- Closed
- Rejected
- Cancelled

c. Click on the category you would like to view.
d. Number of tickets present in each category
e. Click on any ticket record to view the details

Please refer Figure 82

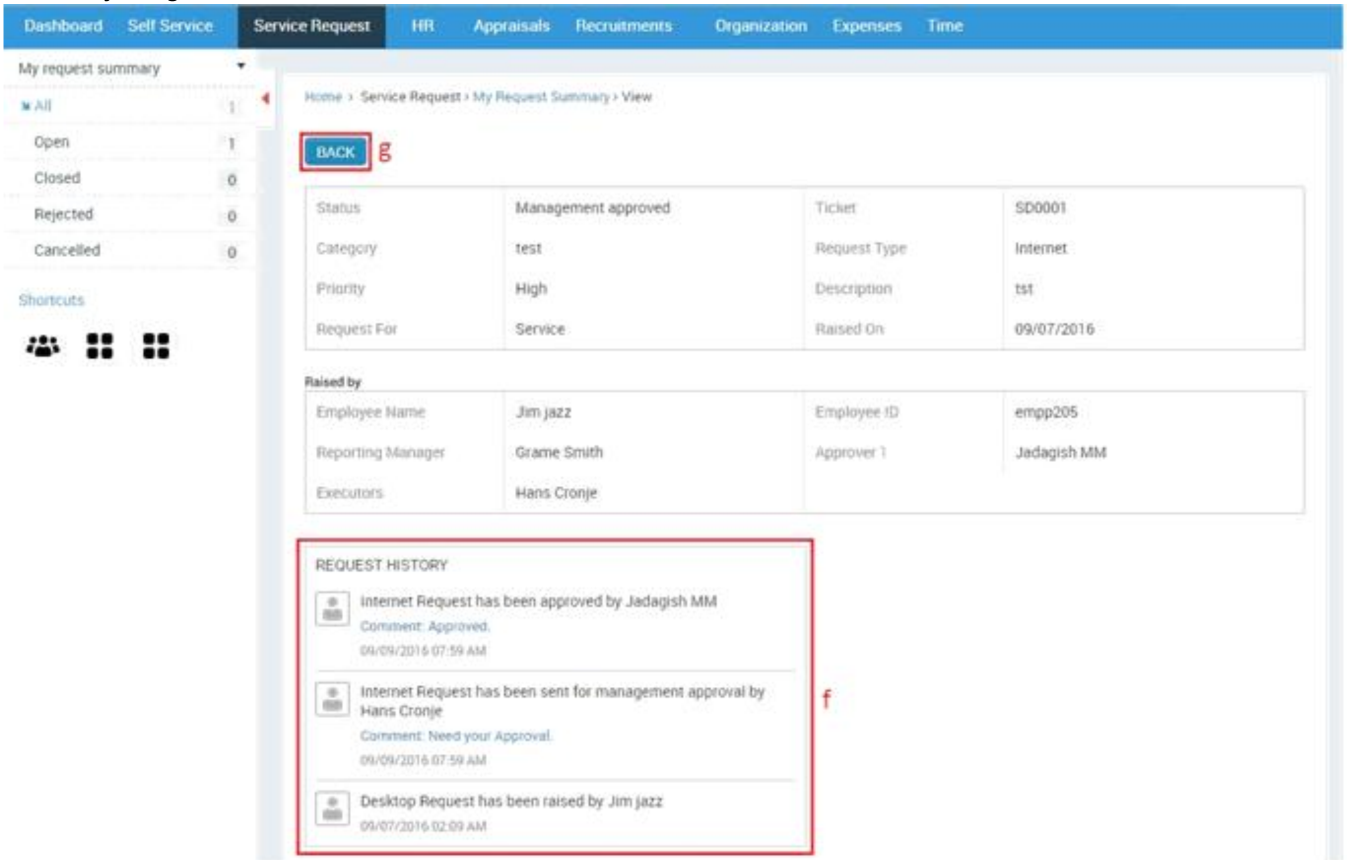


Figure 82

f. You can view the service request history here
g. Click **BACK** to return to the service request grid

5.7 How do I execute a Service Request?

If you have been configured as the executor or one of the executors for a service request category, then you will receive an email when an employee raises a request (Provided the executor and employee belong to the same Business Unit).

Please refer Figure 83

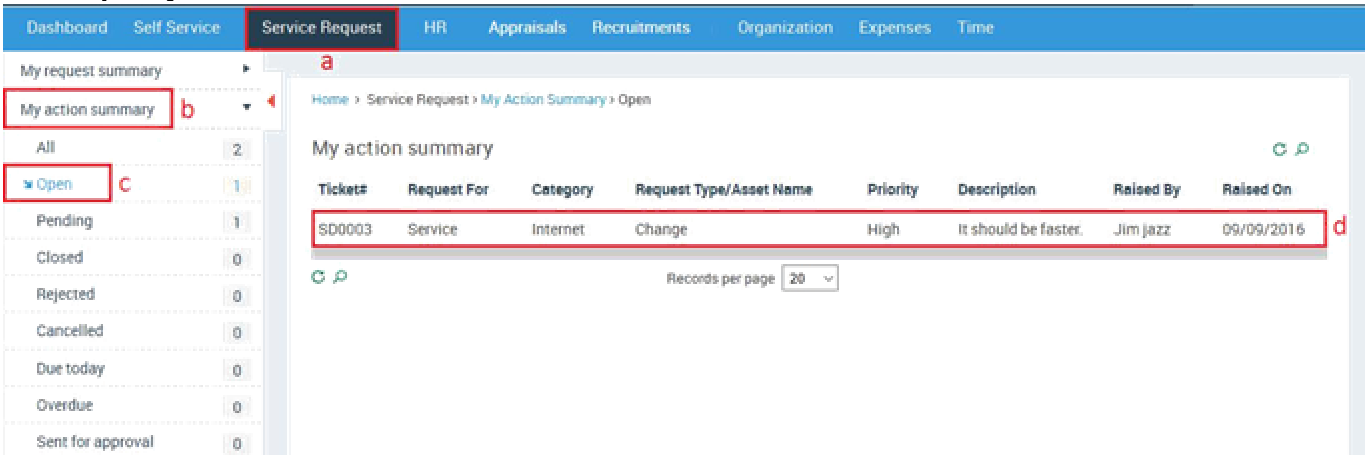


Figure 83

a. Click **Service Request** in the top menu
b. Click **My action summary** on the left menu panel
c. Click **Open** in the submenu
d. Click on any ticket record to view the details

The actual execution takes place offline.

Please refer Figure 84

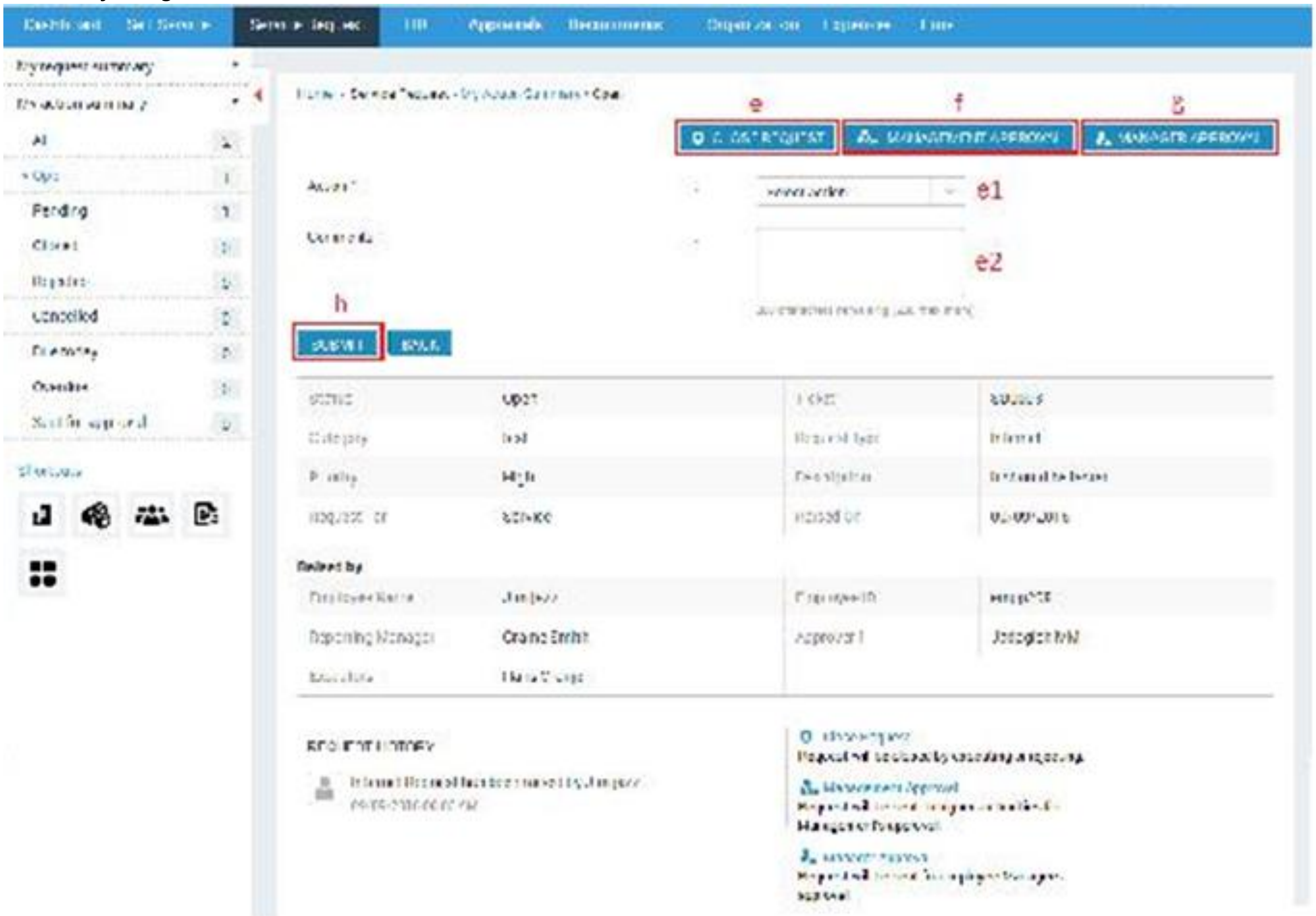


Figure 84

e. Click **Close request** button to approve/reject the request.

   e1. Select an action (Approve/Reject)

   e2. Provide comments.

f. Request **Management Approval** for the service request (They will be the approver(s) selected while configuring the Service Request Settings)

g. Request **Manager Approval** for the service request (The employee's reporting manager)

h. Click **SUBMIT** button

> Requests can be closed at any point by the executor, except when Management/Manager approval is pending

5.8 How do I approve a Service Request as Management (Approver)/Manager?

Please refer Figure 85

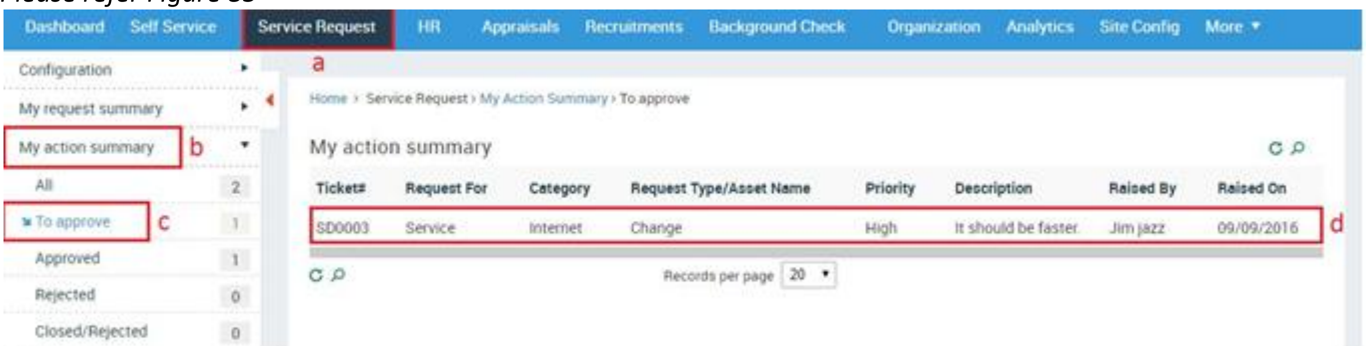


Figure 85

a. Click **Service Request** in the top menu
b. Click **My Action Summary** on the left side panel
c. Click **To approve** in the submenu
d. Click on any ticket record to view the details

Please refer Figure 86

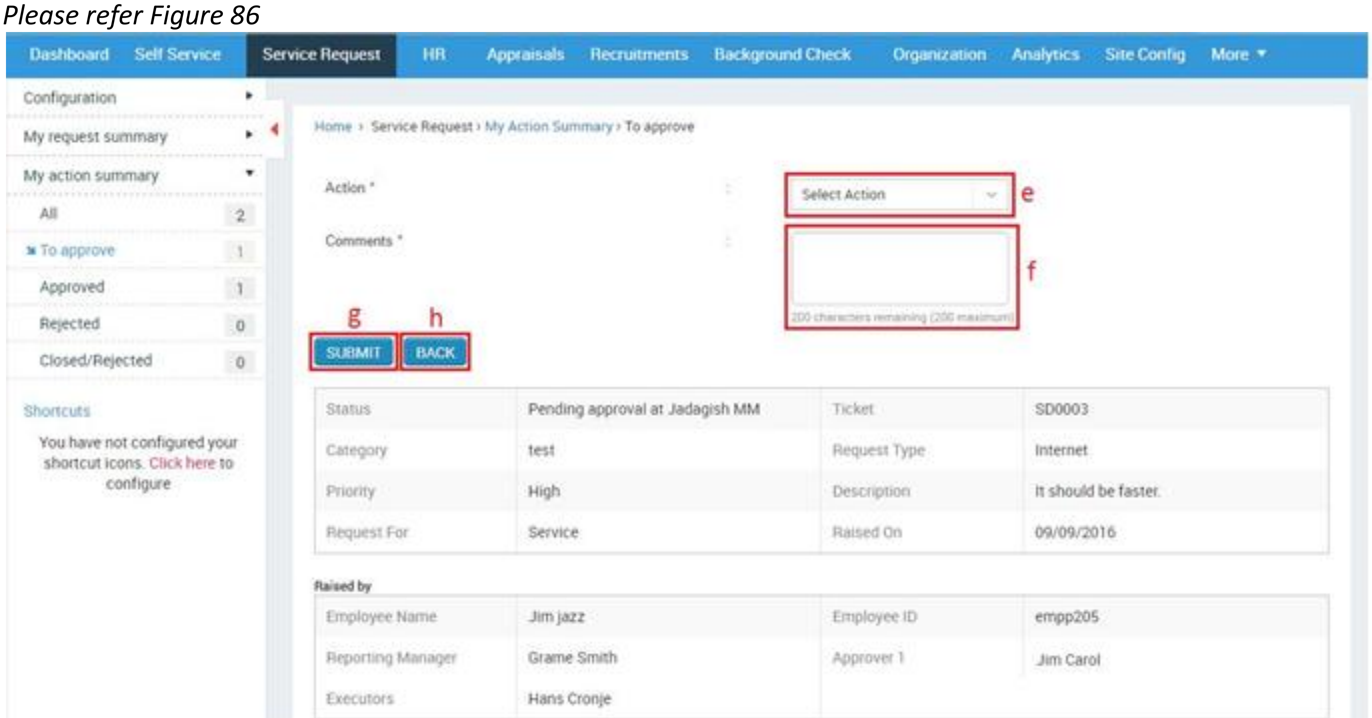


Figure 86

e. Select any action (Approve/Reject)
f. Provide comments
g. Click **SUBMIT** button
h. Click **BACK** button to return to the service request grid

5.9 How do I close a Service Request as an Executor?

If you have requested for approval from either the Management (Approver)/Manager, you will receive an email notification when they take an action.

Please refer Figure 87

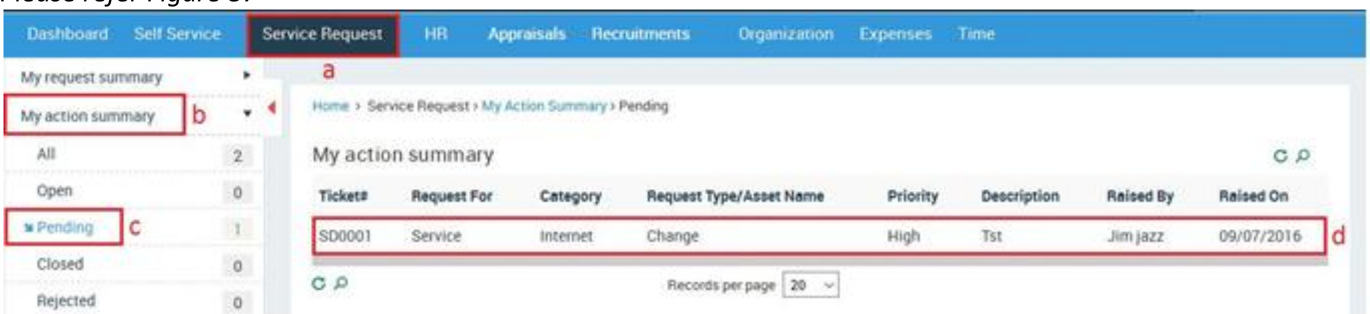


Figure 87

a. Click **Service Request** in the top menu
b. Click **My action summary** on the left menu panel
c. Click **Pending** in the submenu
d. Click on any ticket record to view the details

Please refer Figure 88

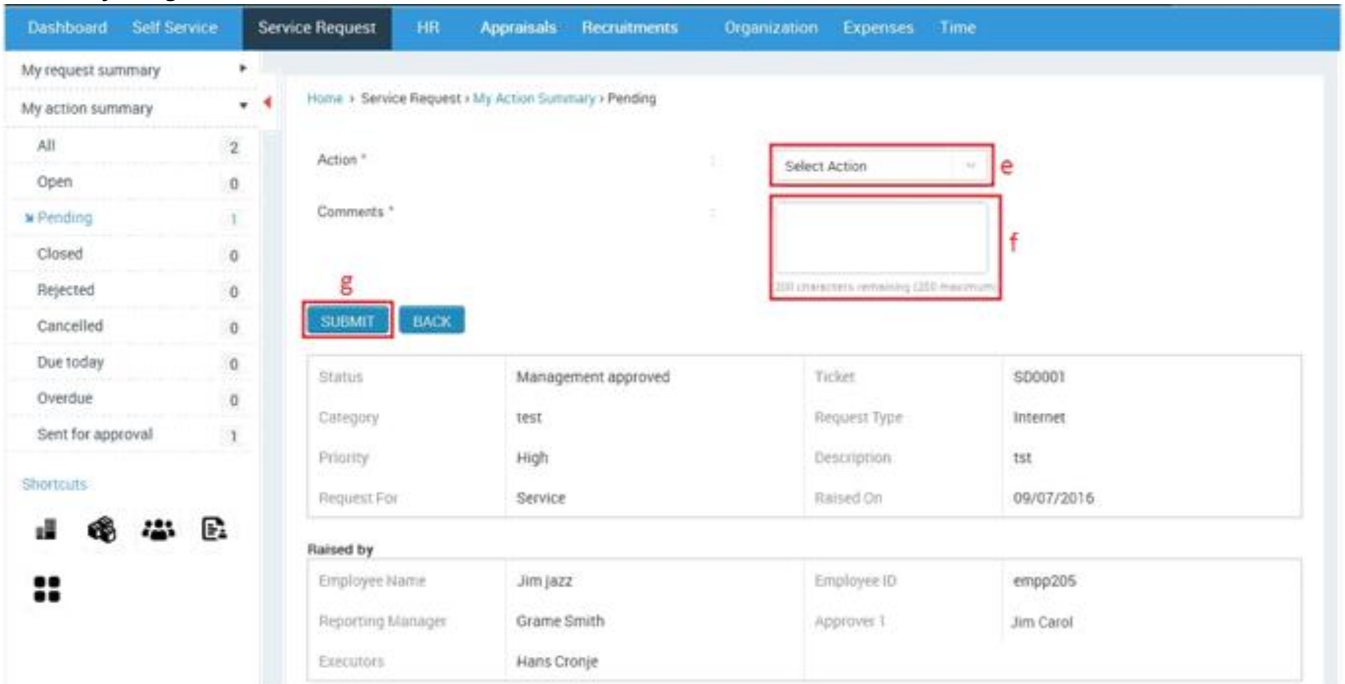


Figure 88

e. Select an action (Approve/Reject)
f. Provide comments.
g. Click **SUBMIT** button

6. HR

HR (Human Resource) deals with user, leave and holiday management configuration. It stores the employee data which includes personal, official, experience, documents, education, visa & immigration details etc.

6.1 Adding Employees

Please refer to section 1.4 How do I add employees to HRMS?

6.2 How do I manage Roles & Privileges?

Access to important data must be monitored and restricted to certain users only. HRMS understands your need for security and enables you to protect your data from unauthorized access through the 'Access Control' feature.

By using the option **Roles & Privileges** in the module **HR**, each role group can be allowed or disallowed to add/delete/edit/view certain features. Only the **Super Admin** & **Management** role group can assign or deny privileges to users.

As mentioned earlier in section 1.1 What are the roles available in HRMS?, there are 6 main role groups available by default in HRMS:

- Management
- Manager
- HR
- Employee
- System Admin
- External User

Within each role group a maximum of 5 role groups can be created.

To create a new role:

Please refer Figure 89

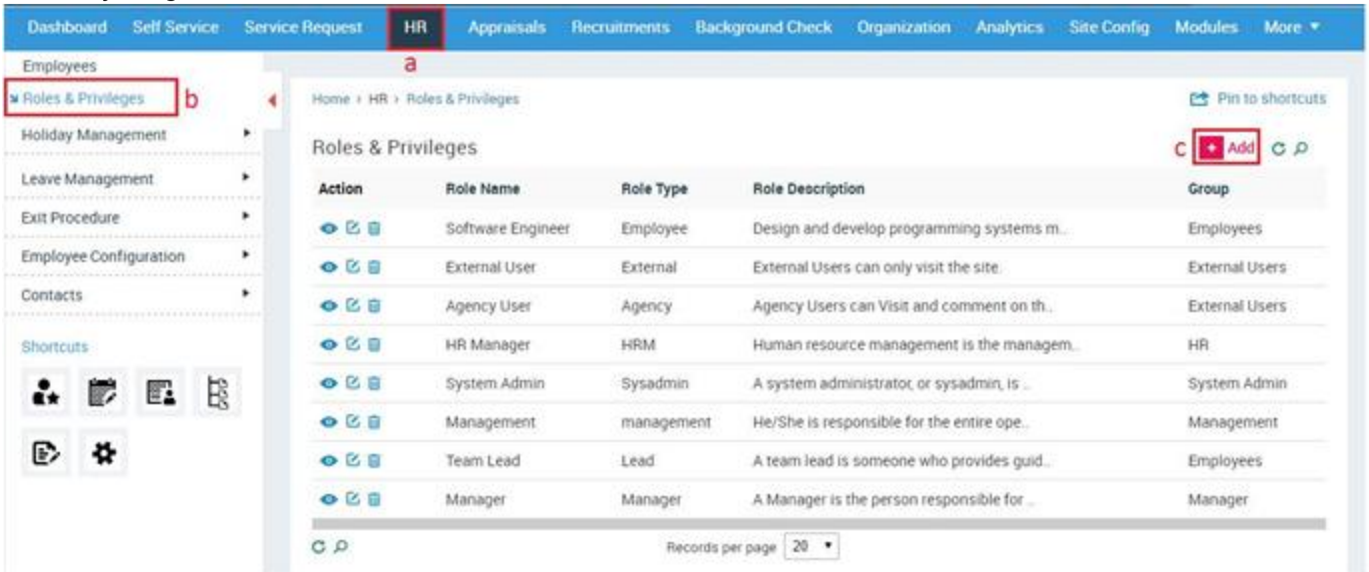


Figure 89

a. Click **HR** in the top menu
b. Click **Roles & Privileges** in the left menu panel
c. Click **+Add** button on the right side

Please refer Figure 90

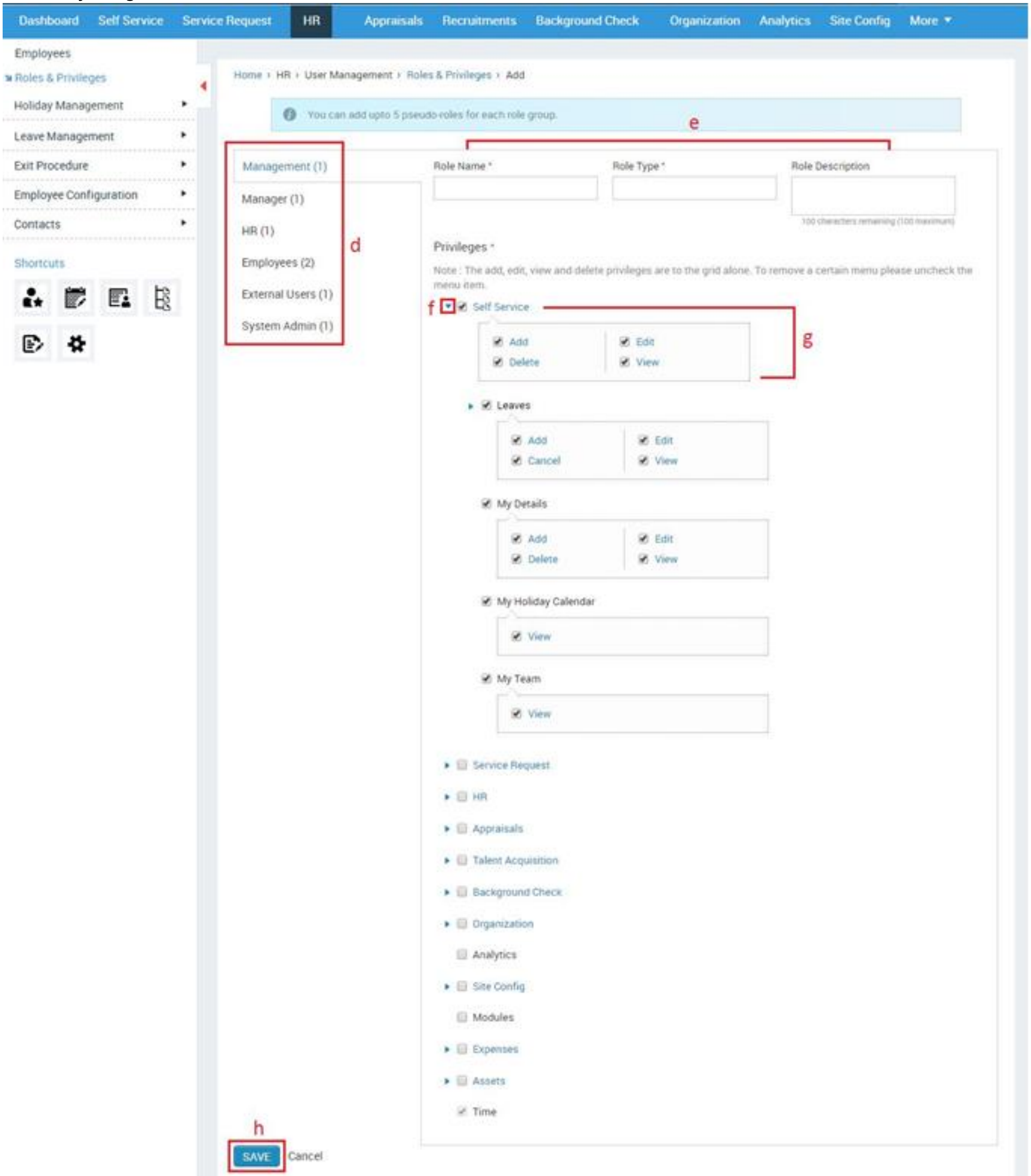


Figure 90

d. Click on the default role you want on the left side
e. Fill in the required details
f. Click on the triangle dropdown icon to view the privilege options
g. Select the modules and their respective privileges you require for this role
h. Click **SAVE** button

6.3 How do I add External Users?

External Users have limited access to information on HRMS. There are 2 types of External Users in this application:

- Background Check Agency Users
- External User (For any purpose suitable for your organization)

For other external roles such as Vendors and Clients, please refer **Contacts**.

Please refer Figure 91

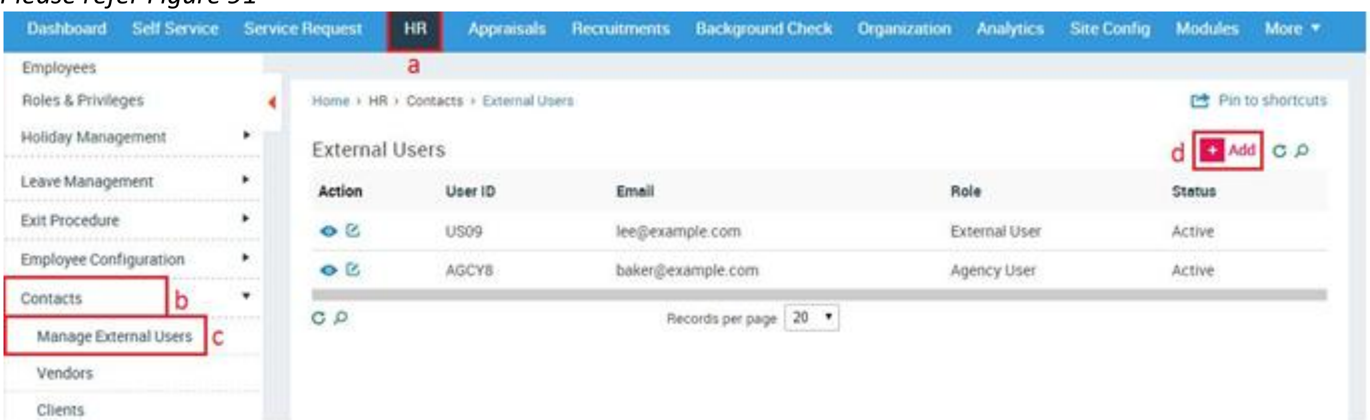


Figure 91

a. Click **HR** in the top menu
b. Click **Contacts** in the left menu panel
c. Click **External Users** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 92

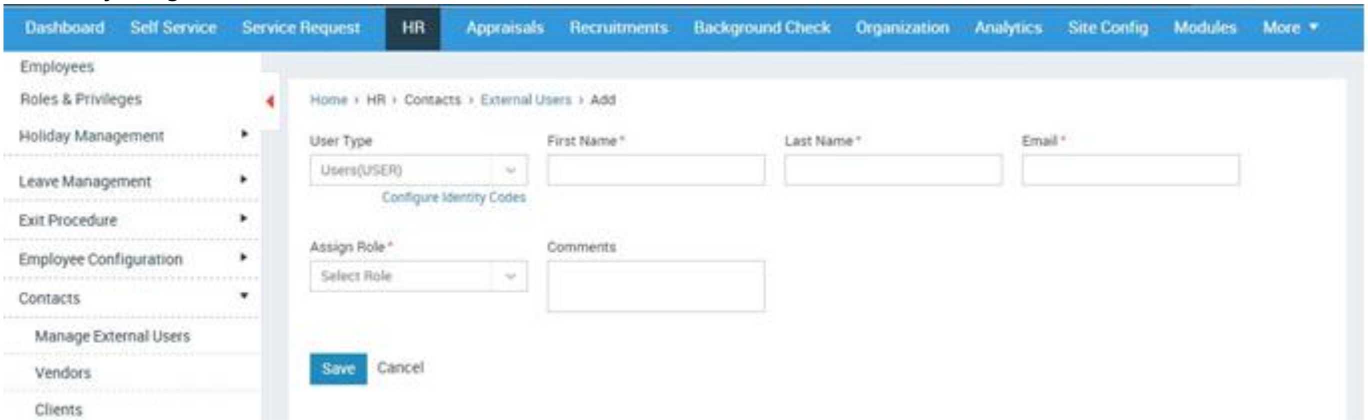


Figure 92

e. Fill in the required details
f. Click here to change the identity code
g. Click **SAVE** button

External roles will have only the privilege to 'view' Organization Details will populate in the drop down option for field 'Assign Role'.

6.4 Holiday Management

Please refer section 3.11 - 3.13

6.5 Leave Management

Please refer section 3. Leave Management

6.6 Employee Configuration

This feature will let you choose the tabs such as salary details, holidays, documents etc. to be displayed in every employee record. You can also configure each tab and add details.

6.6.1 How do I select Employee Tabs?

Please refer Figure 93

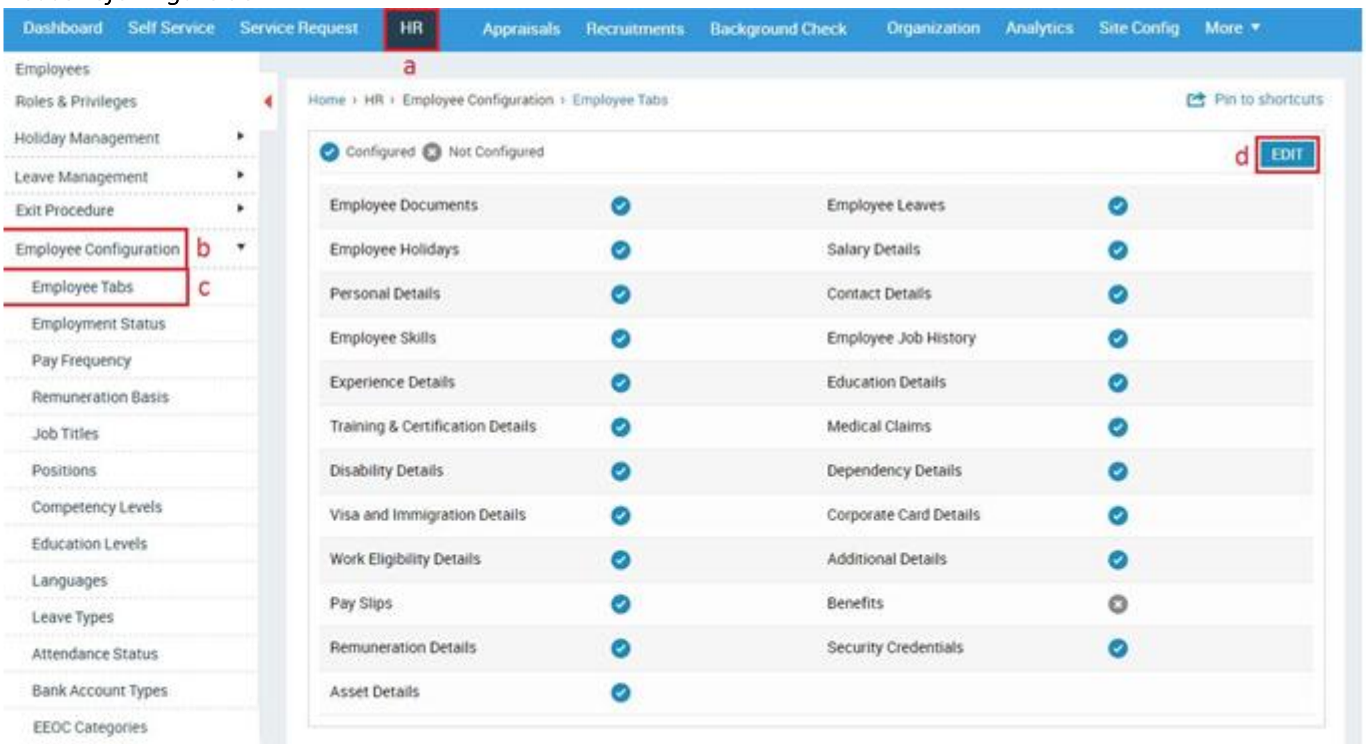


Figure 93

a. Click **HR** in the top menu
b. Click **Employee Configuration** on the left menu panel
c. Click **Employee Tabs** in the submenu
d. Click **Edit icon** to configure tabs for employees

Please refer Figure 94

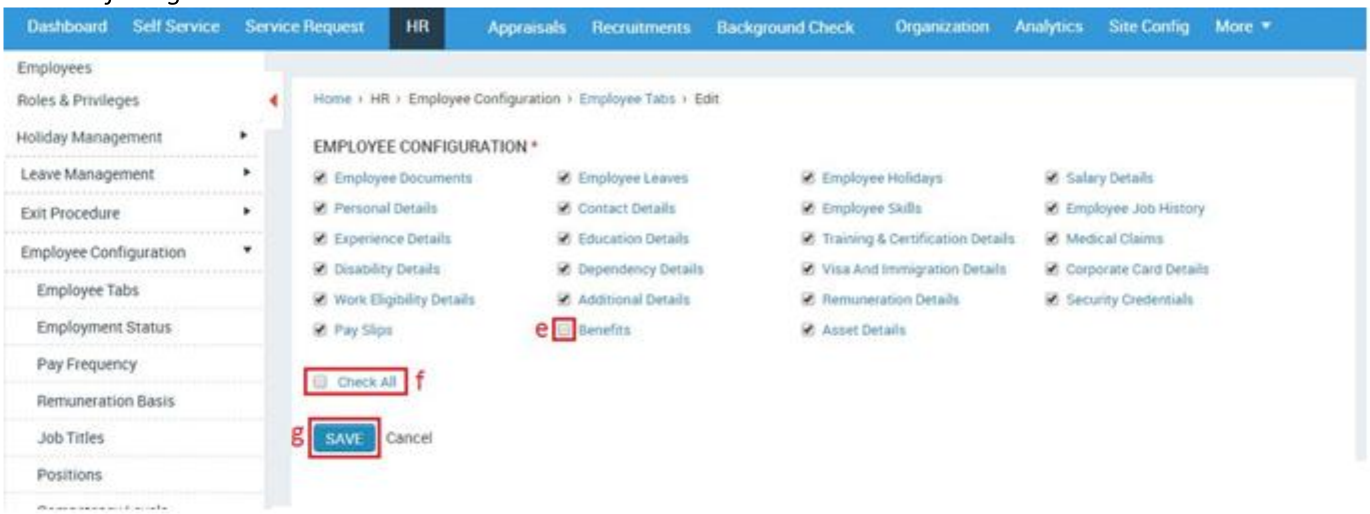


Figure 94

e. To enable specific tabs for employees, select individual checkboxes
f. To enable all the tabs for employees, check “Check All” checkbox
g. Click **SAVE** button

6.6.2 How do I set Employee Configuration?

Please refer Figure 95

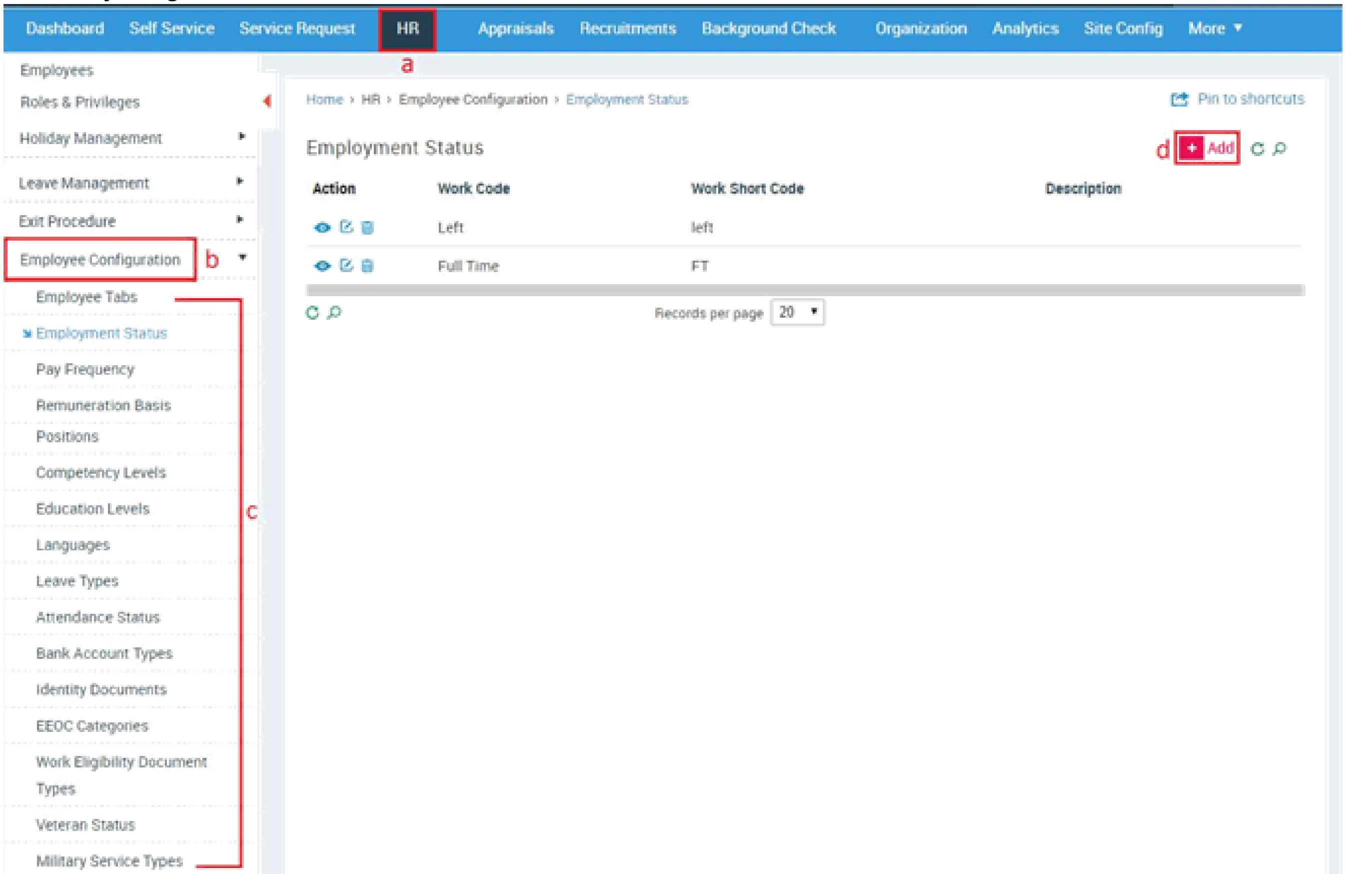


Figure 95

a. Click **HR** in the top menu
b. Click **Employee Configuration** on the left panel
c. Click any sub menu option you would like to add (We have chosen 'Employment Status' as an example)
d. Click **+Add** button on the right side panel

Please refer Figure 96

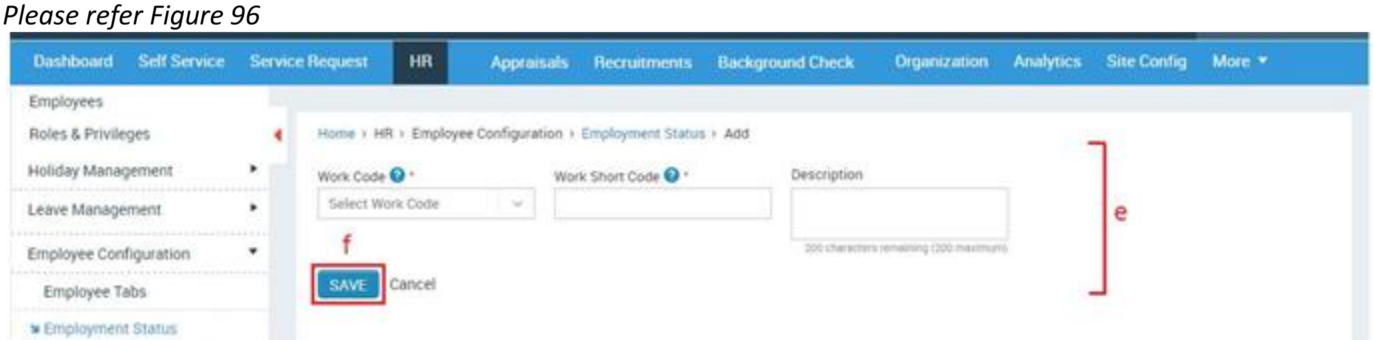


Figure 96

e. Enter the required details
f. Click **SAVE** button

6.6.3 How do I configure Identity Documents settings?

Please refer Figure 97

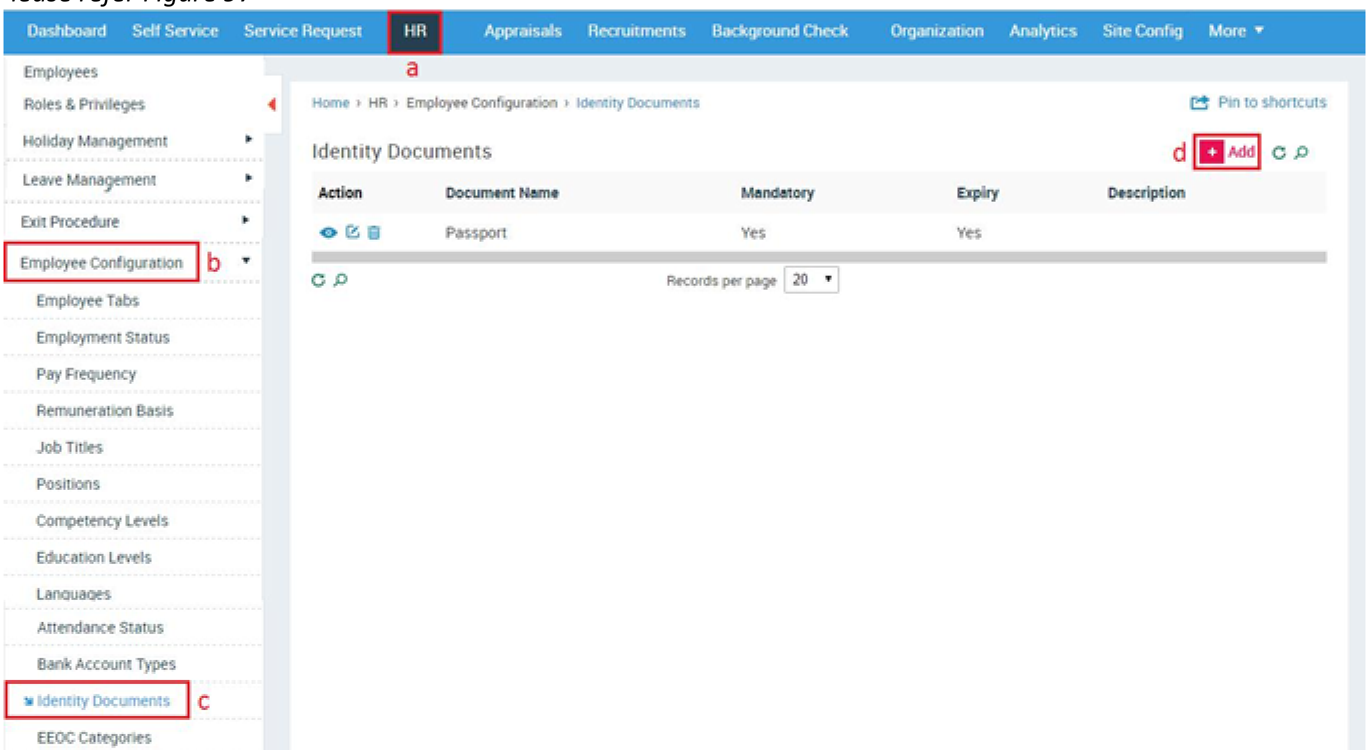


Figure 97

a. Click **HR** in the top menu
b. Click **Employee Configuration** on the left menu panel
c. Click **Identity Documents** in the submenu
d. Click **+Add** button on the right side panel

Please refer Figure 98

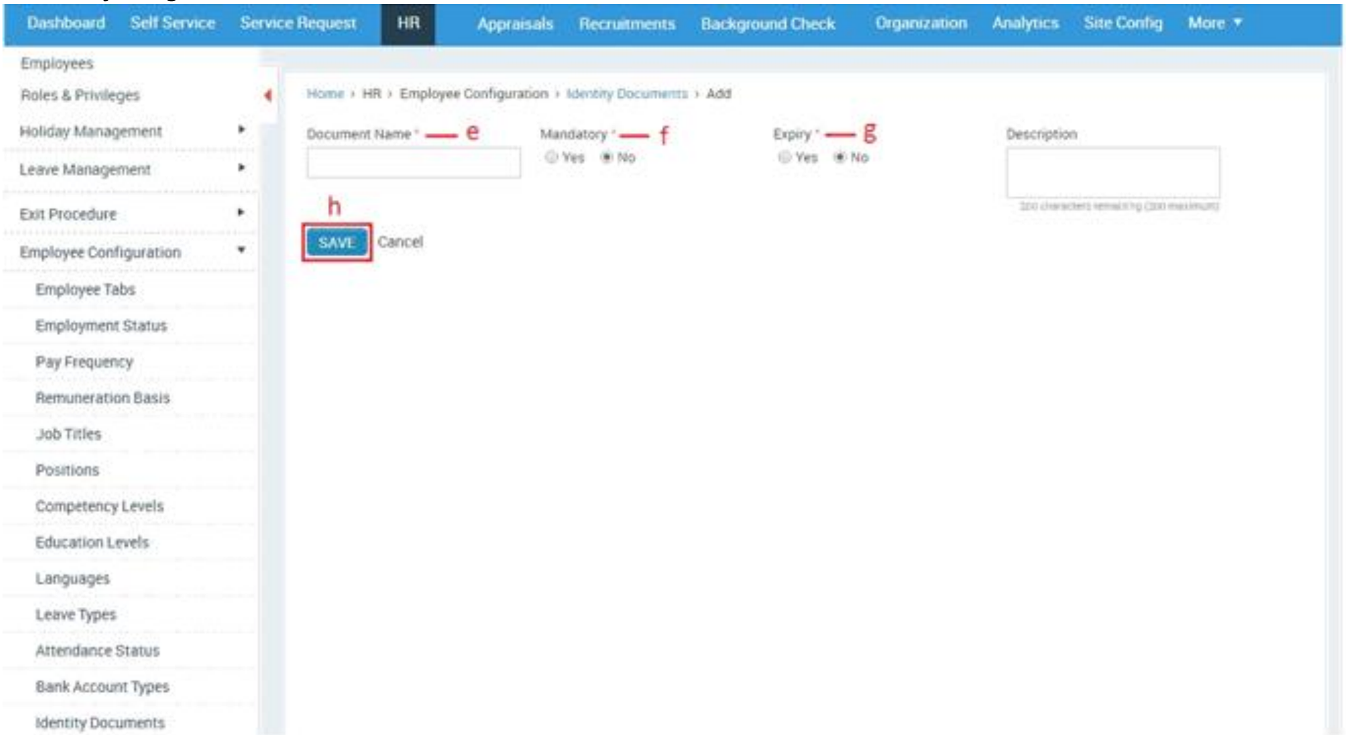


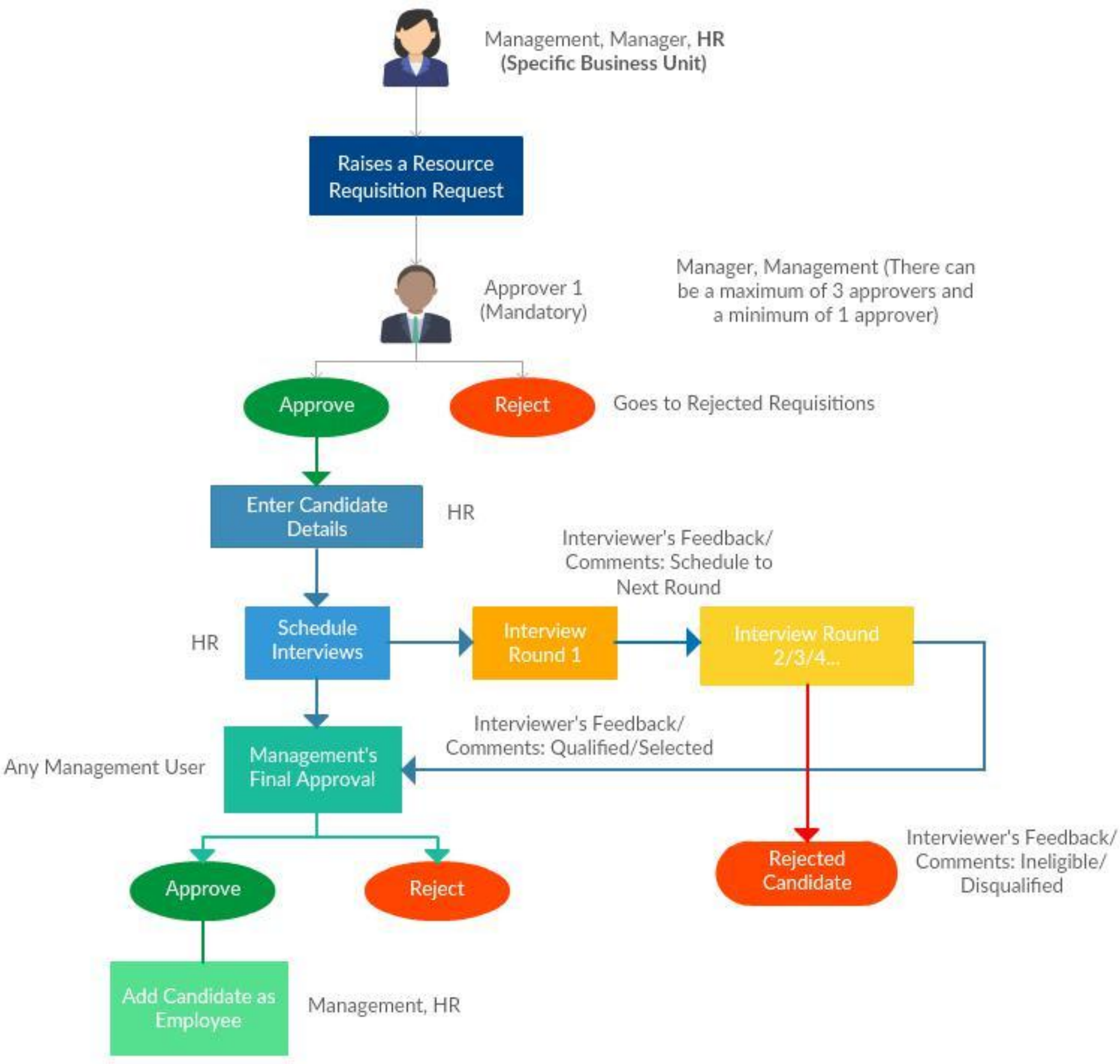
Figure 98

e. Enter document name
f. Select if you require a document to be mandatory or not
g. Select if documents needs to have an expiry date
h. Click **SAVE** button

Employees will be able to add their documents in Self Service > My Details > Personal > Edit

7. Recruitments

Recruitments simplify your hiring process by giving you the provision to initialize a requisition, manage candidate CVs, interviews and shortlist/select candidates. Below is the recruitment process flowchart.



Description:

- A User (Management/Manager/HR) raises a requisition request. According to the number of approvers selected (Min: 1 Max: 3), the approvers (Management, Manager) have to approve/reject the requisition request. A requisition can be rejected at any level
- After the requisition request has been approved, the HR can enter the details (CV) of the candidate
- The HR will then schedule an interview
- The interview takes place offline
- The interviewer (Management/Manager/HR/Employee) provides the feedback about the candidate
- The Management has to give their final consent, they can either approve/reject
- Once the Management approves, the HR can add the candidate to the application

7.1 How do I create a Job Requisition/Opening?

Please refer Figure 99

Figure 99

a. Click **Recruitments** in the top menu
b. Click **Openings/Positions** on the left menu panel
c. Click **+Add** button on the right side

Please refer Figure 100

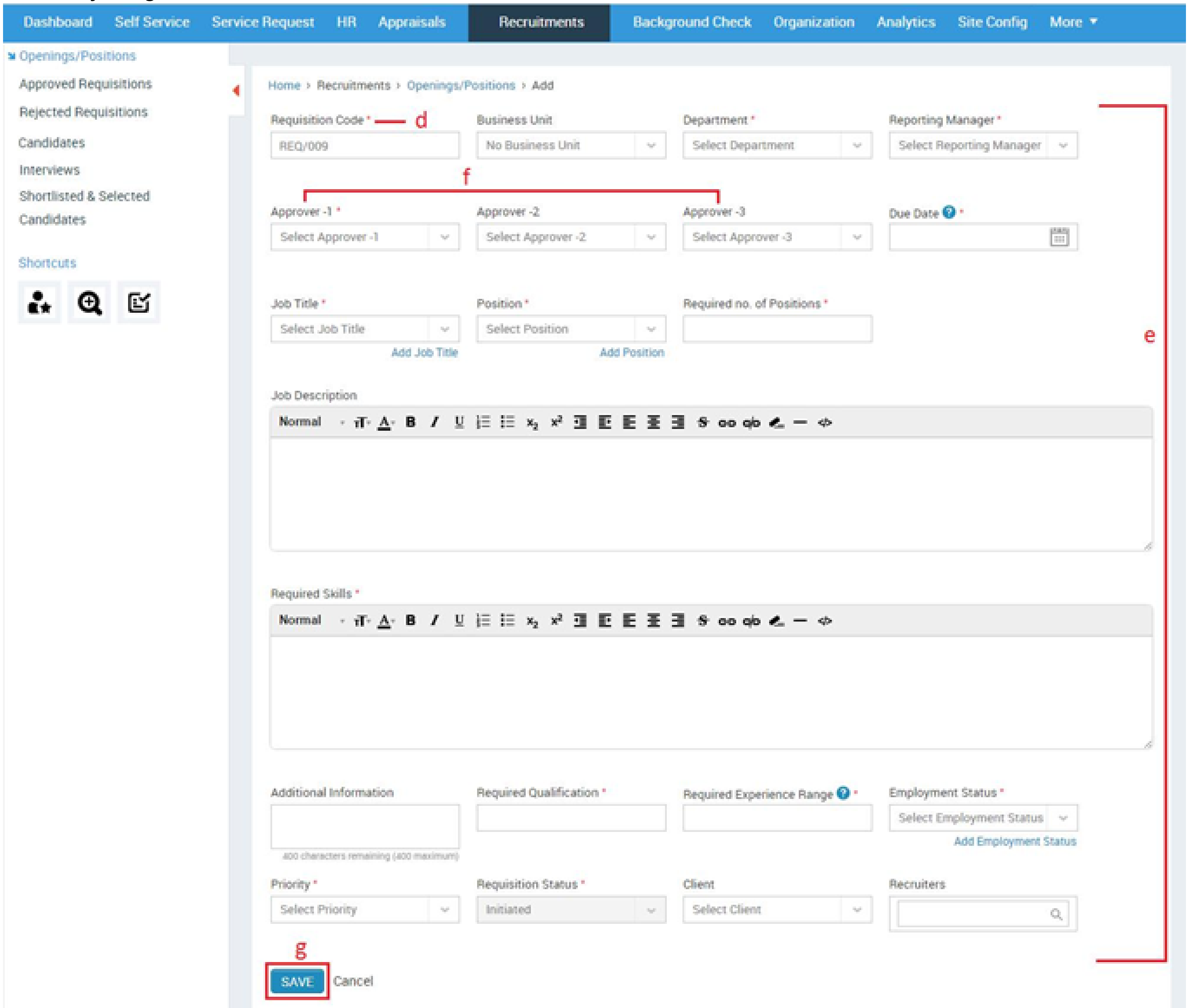


Figure 100

d. Requisition ID will be generated automatically
e. Enter the required details
f. Select the approver(s)
g. Click **SAVE** button

7.2 How do I Approve/Reject a Requisition/Opening?

Please refer Figure 101

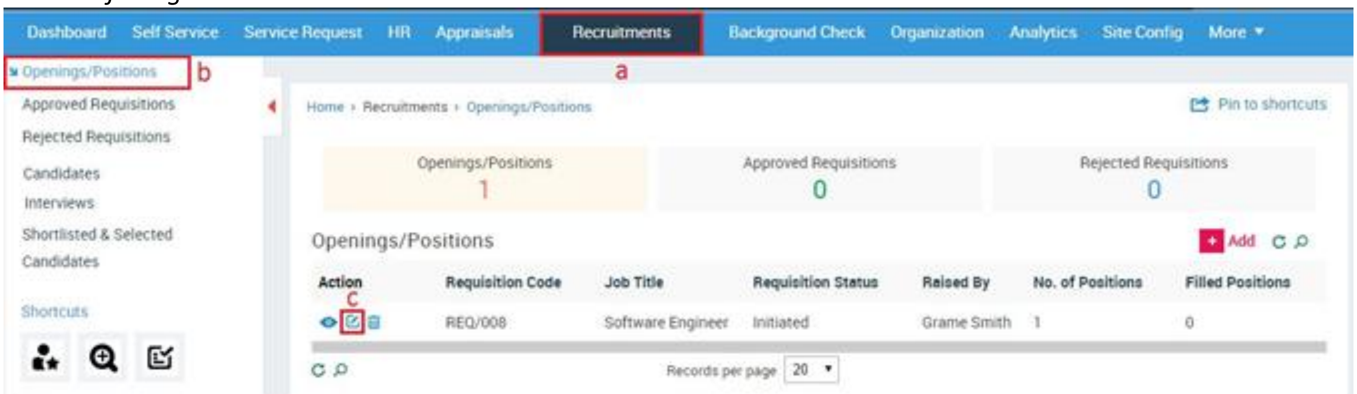


Figure 101

a. Click **Recruitments** in the top menu
b. Click **Openings/Positions** on the left menu panel
c. Click **Edit** icon in the action column

Please refer Figure 102

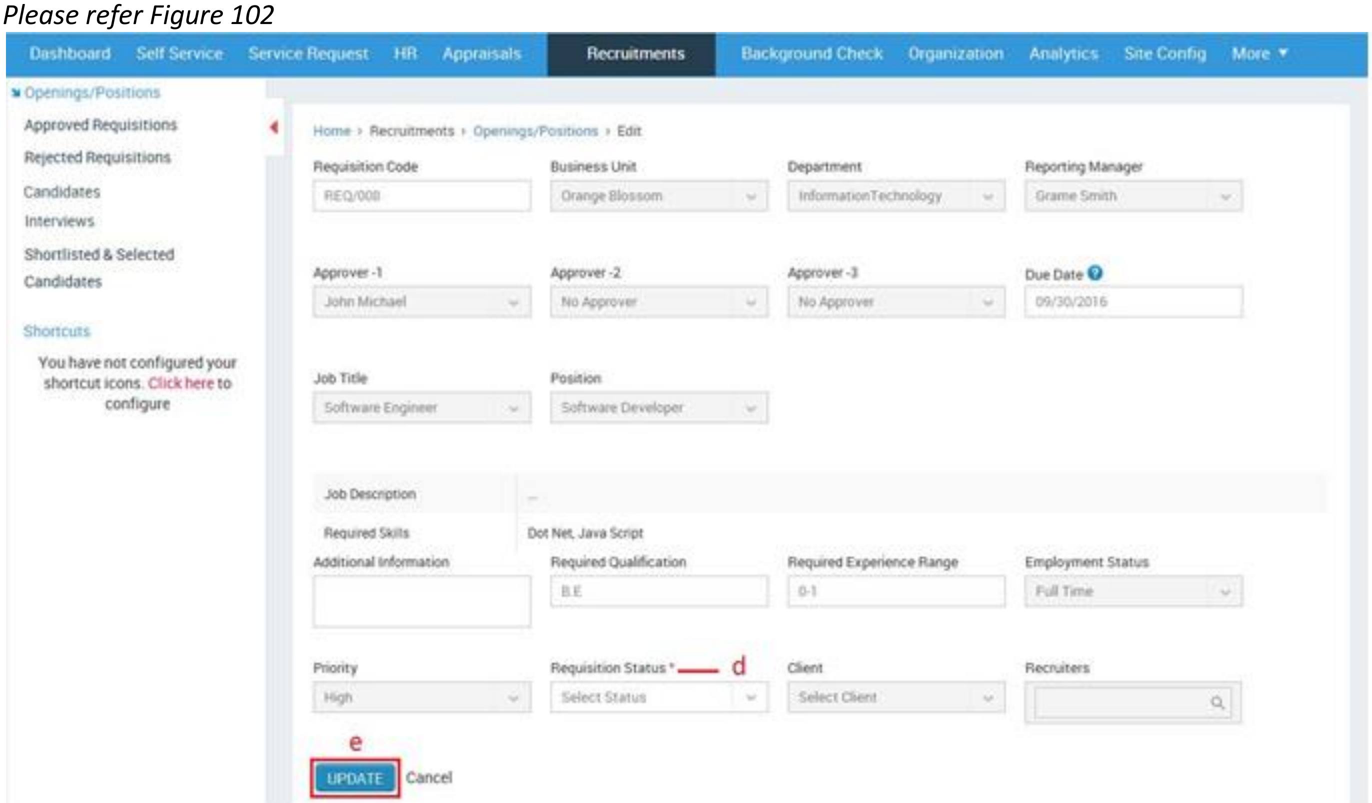


Figure 102

d. Select an action **(Approve/Reject)** in the field requisition status
e. Click **UPDATE** button

7.3 How do I enter a Candidate's details?

Please refer Figure 103

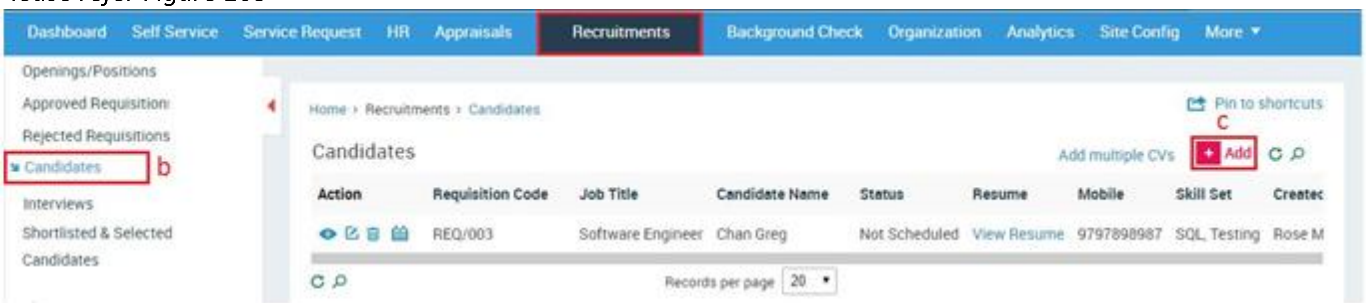


Figure 103

a. Click **Recruitments** in the top menu
b. Click **Candidates** on the left side panel
c. Click **+Add** button on the right side

Please refer Figure 104

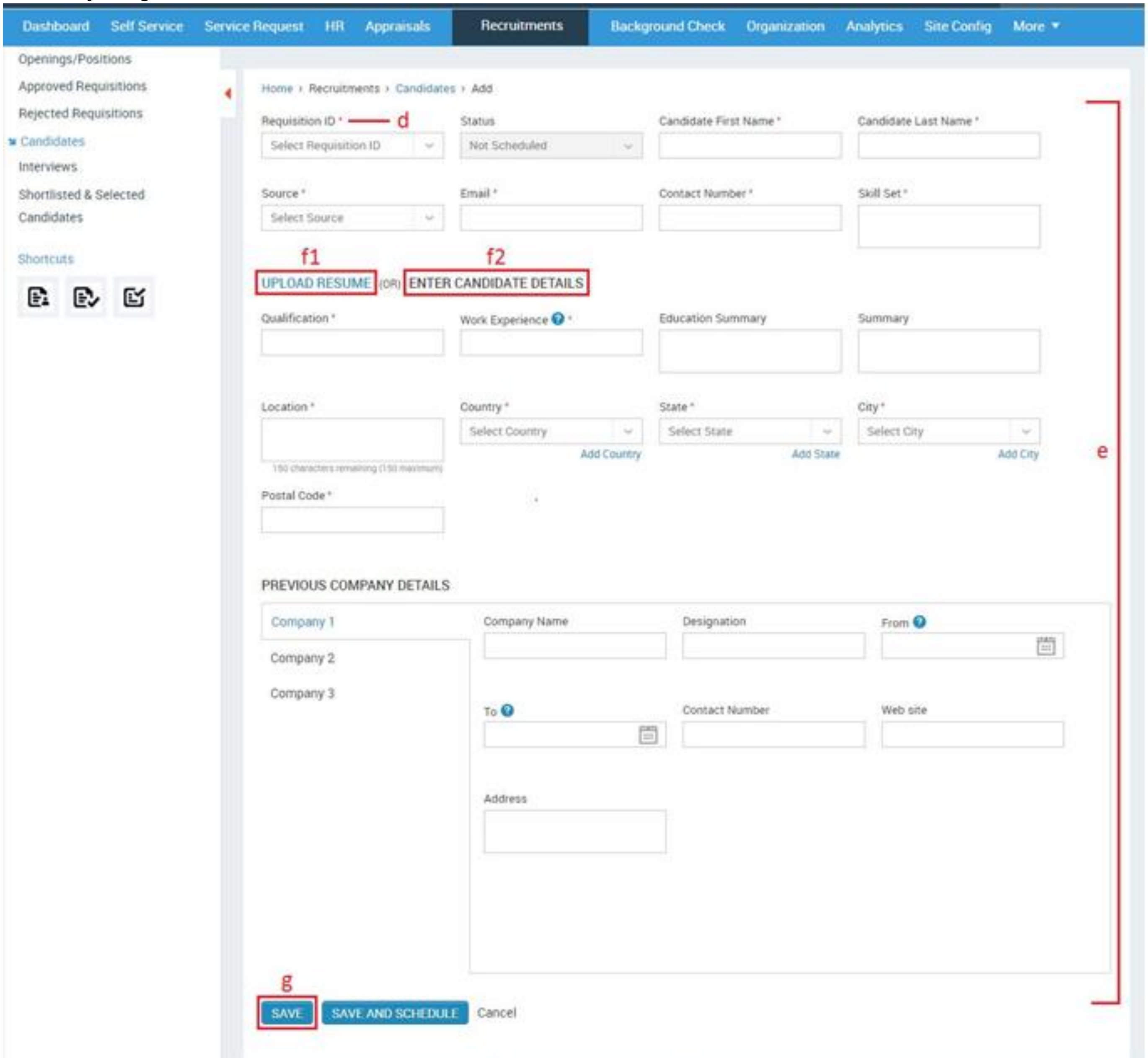


Figure 104

d. Select the Requisition ID
e. Enter Candidate's name
f1. Click to upload resume

Or

f2. Click here to enter candidate details in a form

g. Click **SAVE** button

7.4 How do I Schedule an Interview?

Please refer Figure 105

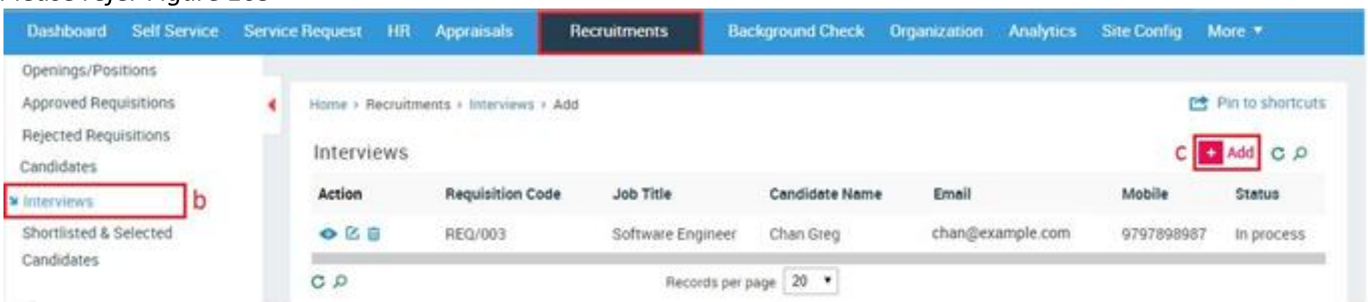


Figure 105

a. Click **Recruitments** in the top menu
b. Click **Interviews** on the left menu panel
c. Click **+Add** button on the right side

Please refer Figure 106

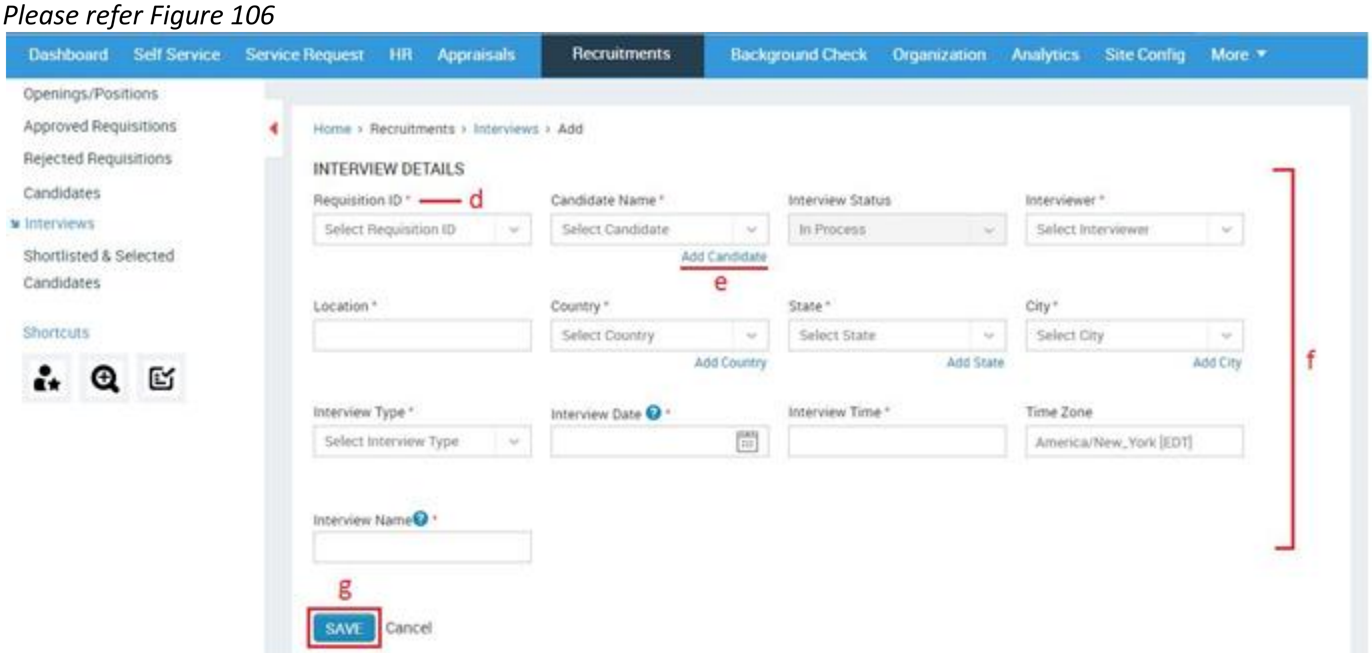


Figure 106

d. Select the Requisition ID
e. Add candidate details if they aren't added

f. Enter the required details
g. Click **SAVE** button

The interviewer and candidate will receive email notifications informing them about the interview.

7.5 How do I provide Feedback for an Interview?

Please refer Figure 107

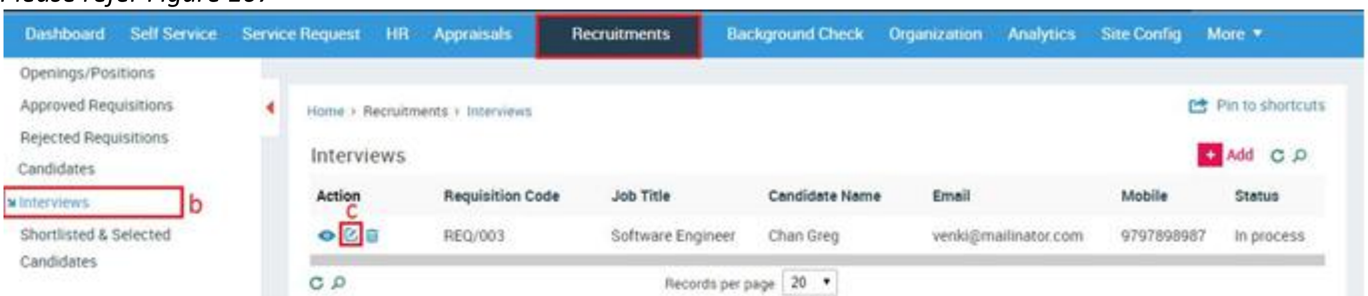


Figure 107

a. Click **Recruitments** menu option
b. Click **Interviews** on the left side panel
c. Click **Edit** icon against an interview

Please refer Figure 108

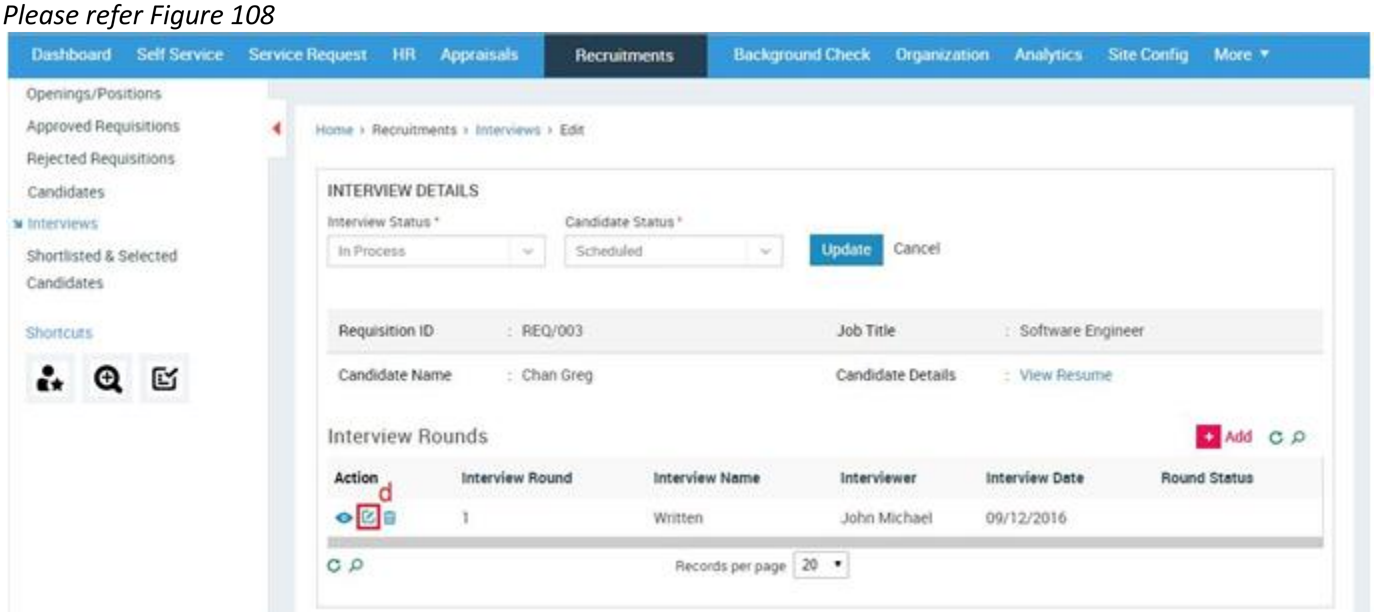


Figure 108

d. Click **Edit** icon against an interview round

Please refer Figure 109

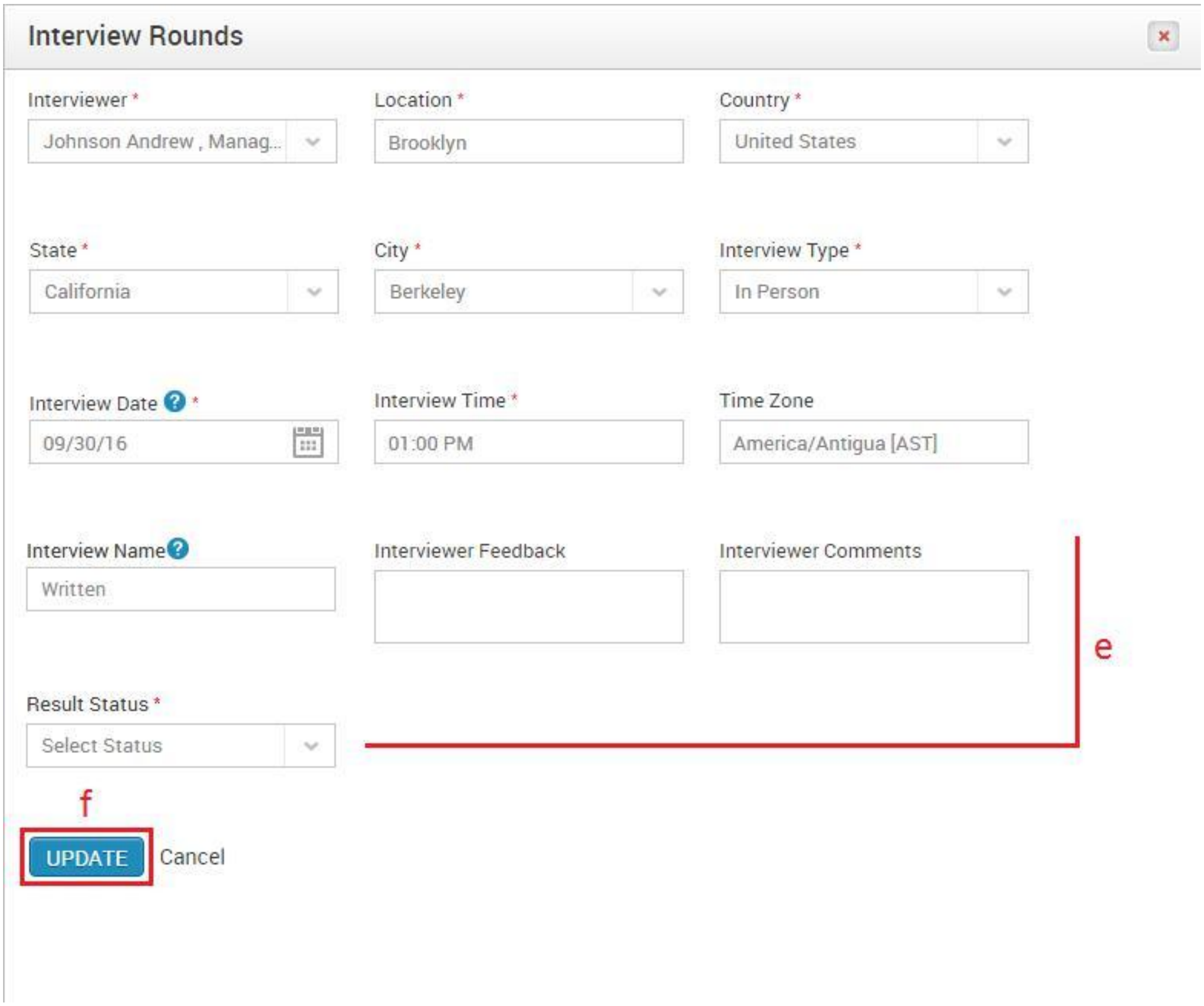


Figure 109

e. Provide feedback, comments and select the round status
f. Click **UPDATE** button

Please refer Figure 110

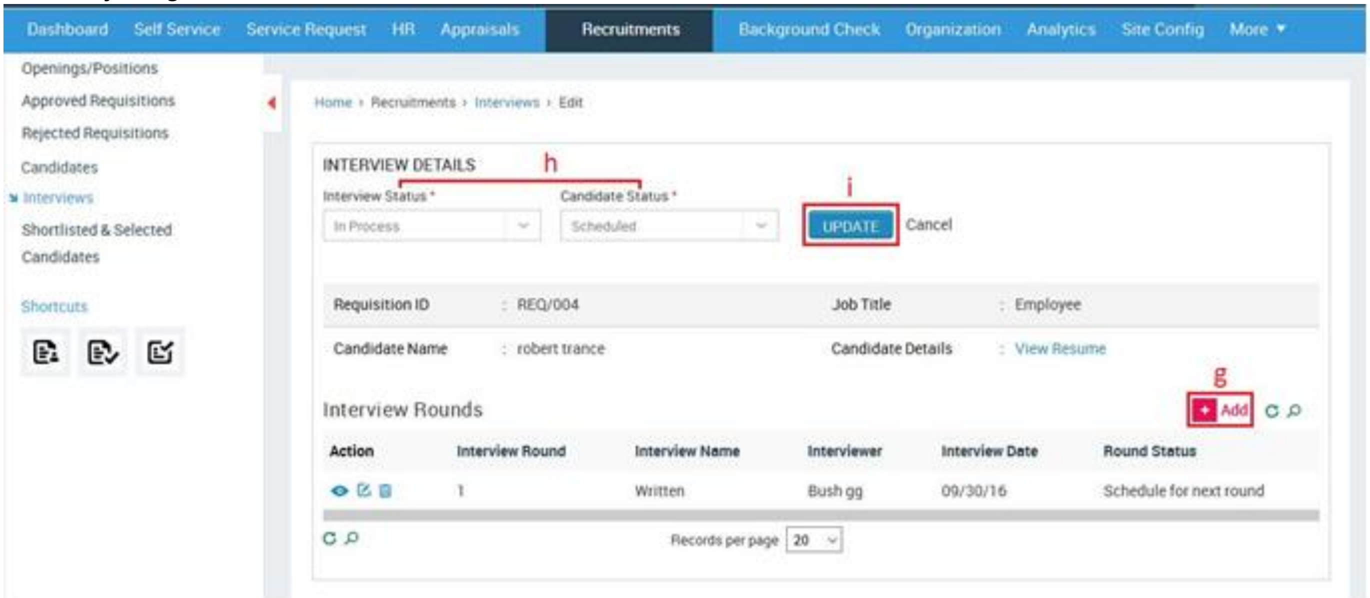


Figure 110

g. Click **+Add** to add another interview round (Provided you have given ‘Schedule for next round’ as round status)
h. Provide the interview and candidate status
i. Click **UPDATE** button

7.6 How do I select/reject a Shortlisted Candidate? (Management’s Final Approval)

Please refer Figure 111

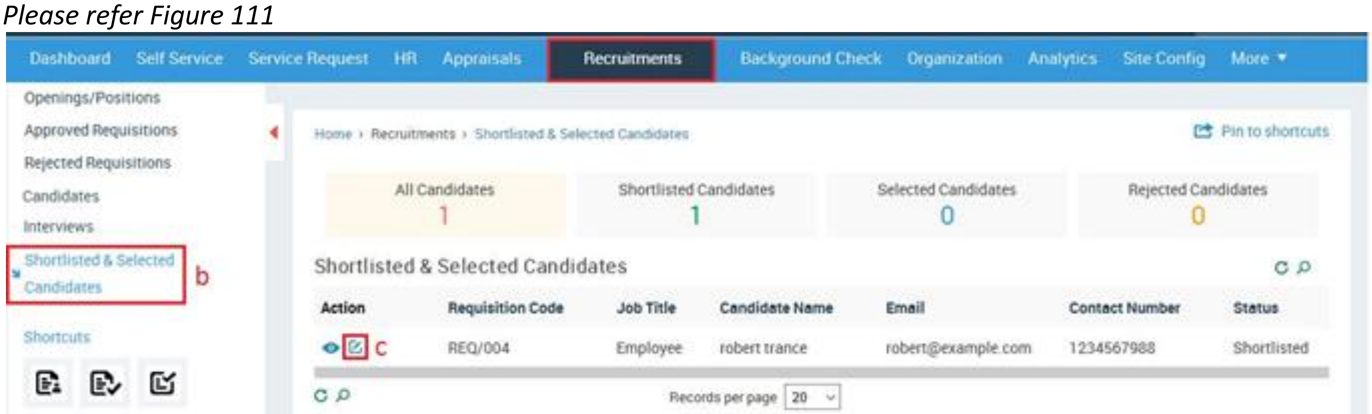


Figure 111

a. Click **Recruitments** in the top menu
b. Click **Shortlisted & Selected Candidates** on the left menu panel
c. Click **Edit** icon against a requisition code

Please refer Figure 112

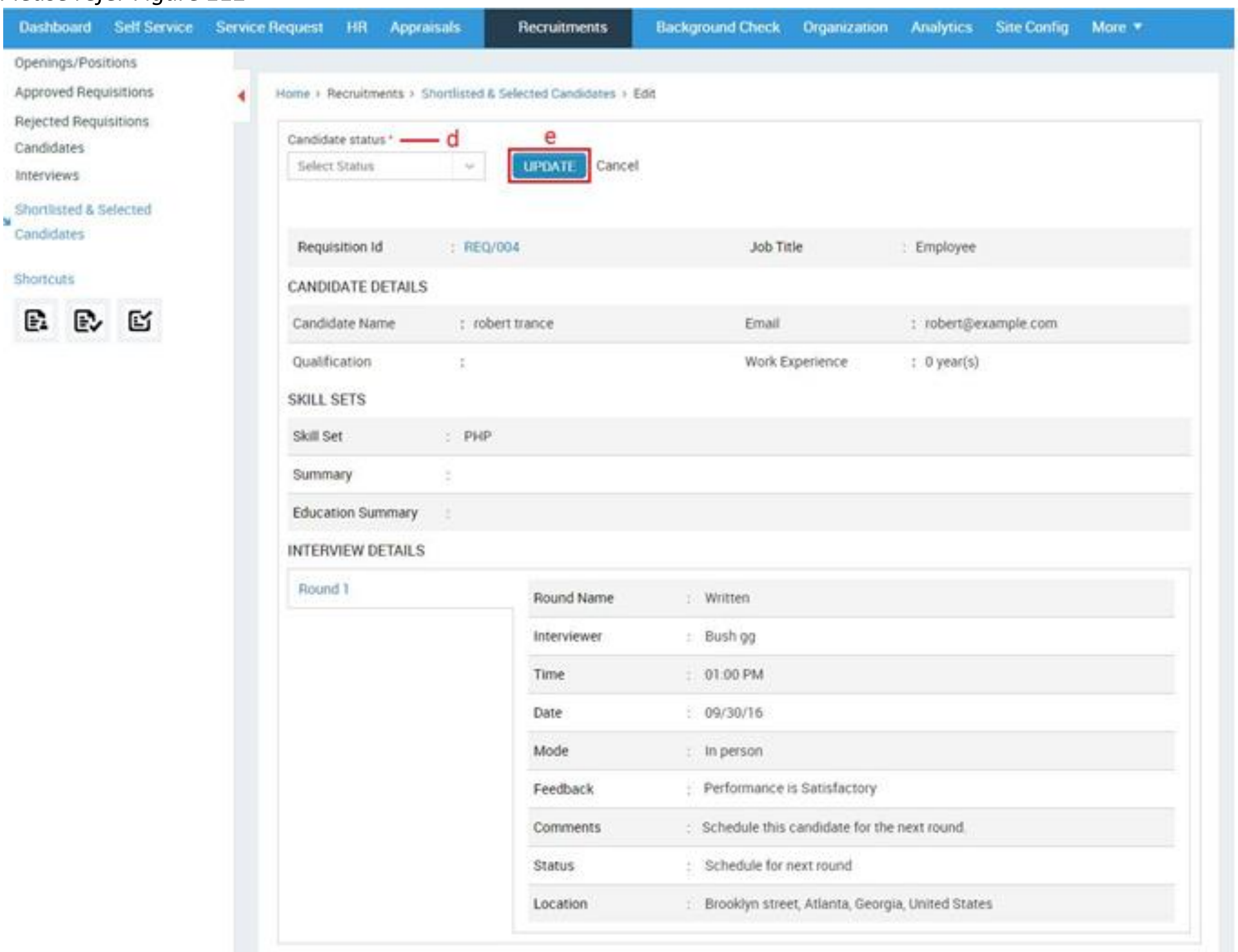


Figure 112

d. Select the status (select/reject)
e. Click **UPDATE** button

7.7 How do I add a Candidate as an Employee?

After an employee has been selected by the Management. The candidate can be added to HRMS.

Please refer Figure 113

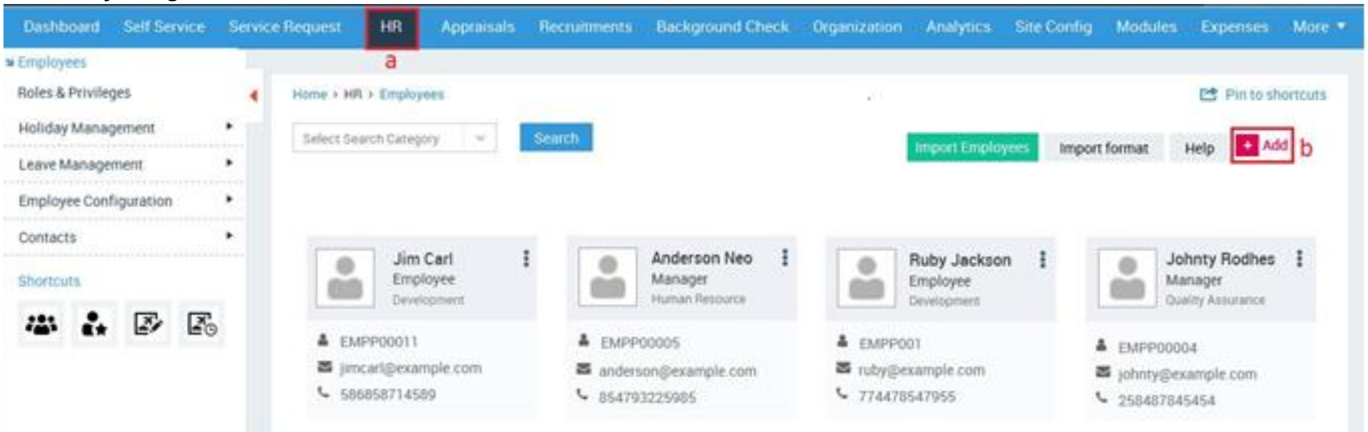


Figure 113

a. Click **HR** in the top menu
b. Click **+Add** button on the right side

Please refer Figure 114

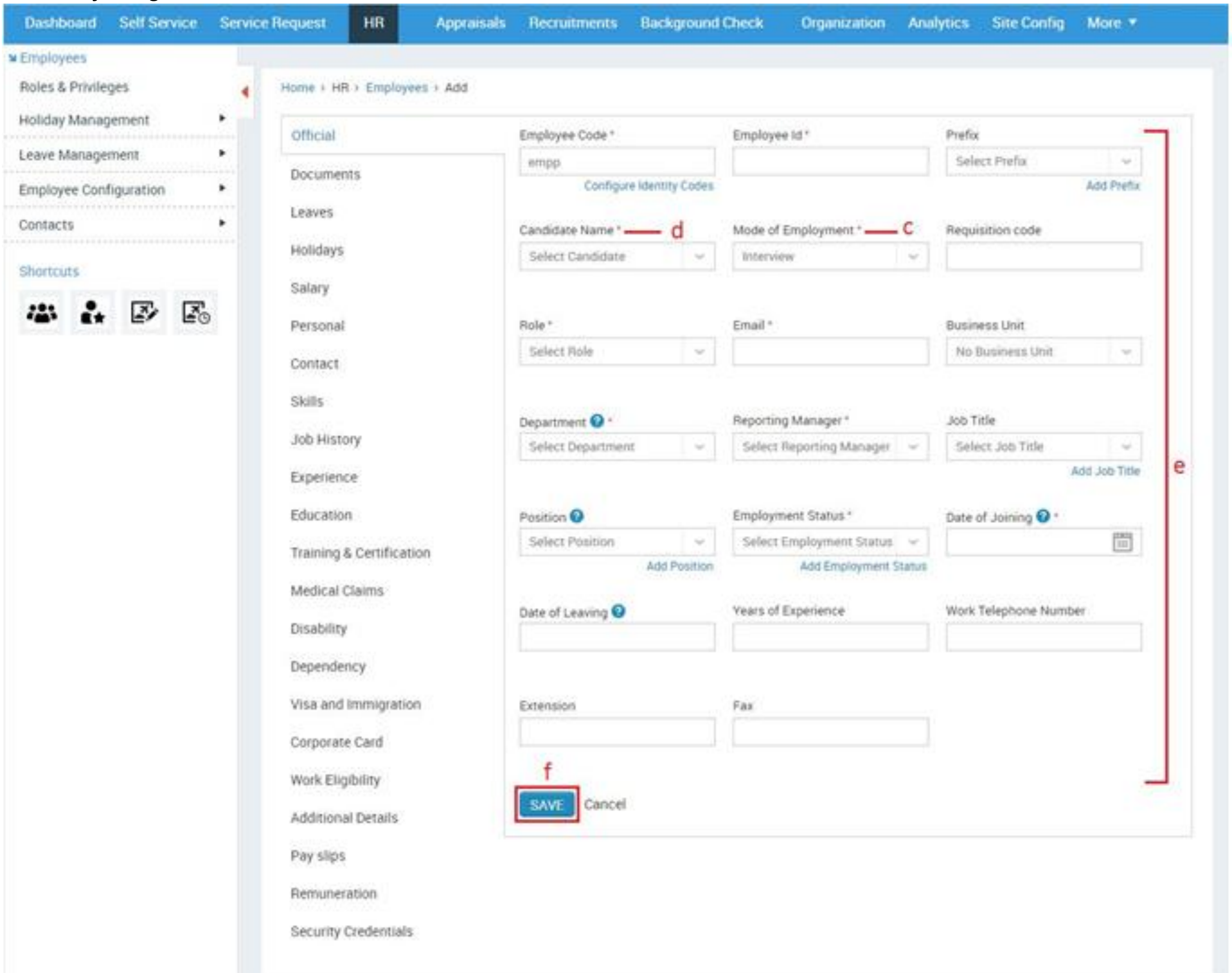
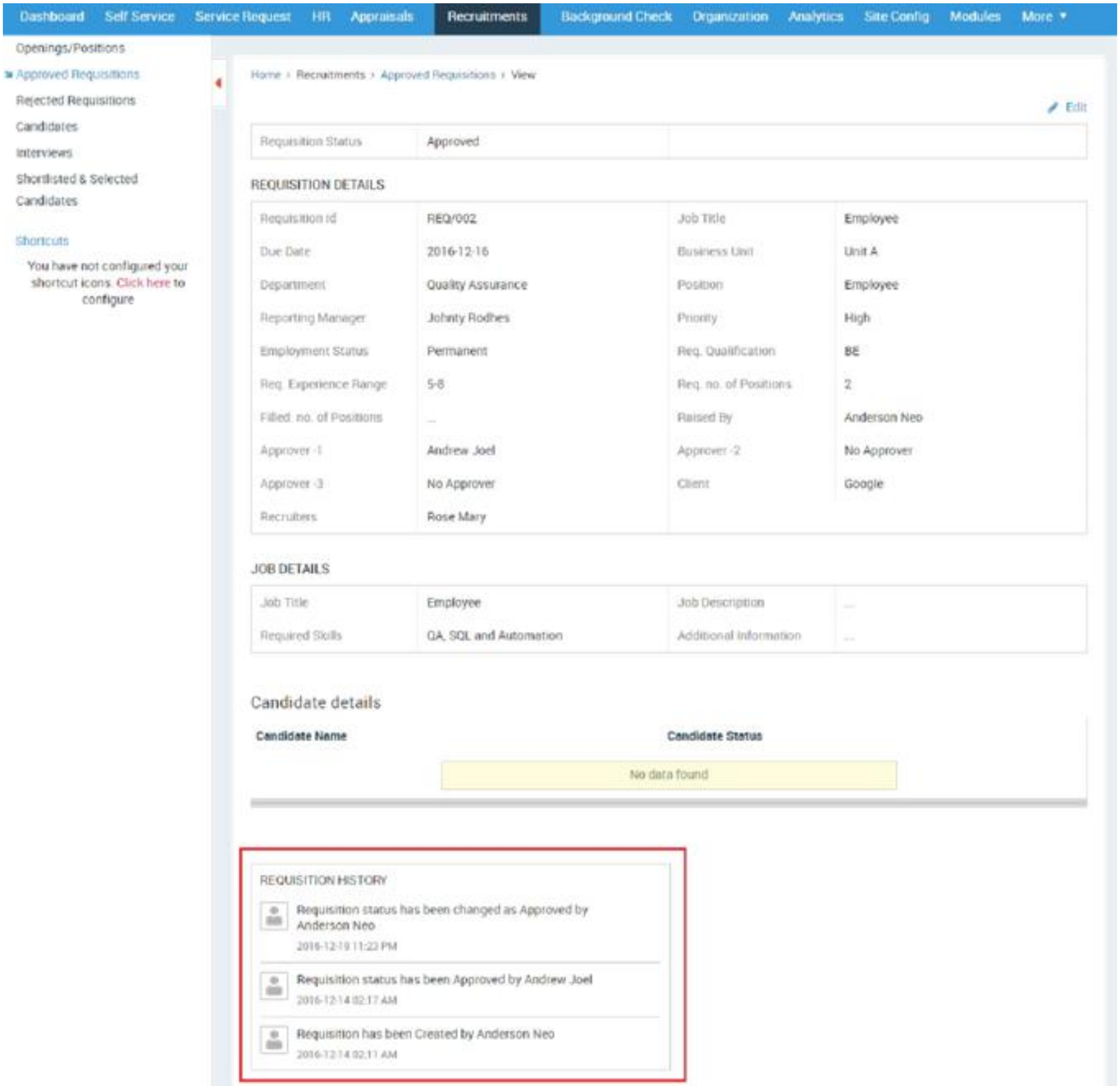


Figure 114

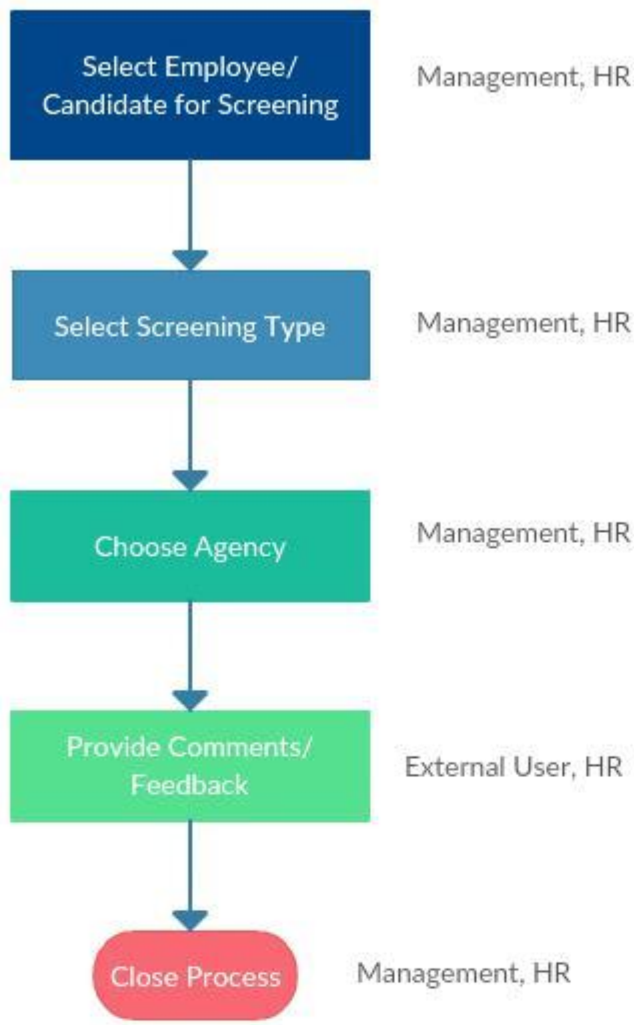
c. Select **'Interview'** in the field Mode of Employment
d. The shortlisted candidates' names will be populated here, select a candidate from the drop down list
e. Enter all the required details
f. Click **SAVE** button

An activity log will be displayed for every action performed by user(s) involved in a Recruitment Cycle. This will provide users more clarity about the status of the process.


Dashboard
Self Service
Service Request
HR
Appraisals
Recruitments
Background Check
Organization
Analytics
Site Config
Modules
More
Openings/Positions
Approved Requisitions
Rejected Requisitions
Candidates
Interviews
Shortlisted & Selected Candidates
Shortcuts
You have not configured your shortcut icons. Click here to configure
Home › Recruitments › Approved Requisitions › View
Edit
Requisition Status
Approved
REQUISITION DETAILS
Requisition Id
REQ/002
Job Title
Employee
Due Date
2016-12-16
Business Unit
Unit A
Department
Quality Assurance
Position
Employee
Reporting Manager
Johnty Rodhes
Priority
High
Employment Status
Permanent
Req. Qualification
BE
Req. Experience Range
5-8
Req. no. of Positions
2
Filled. no. of Positions
...
Raised By
Anderson Neo
Approver -1
Andrew Joel
Approver -2
No Approver
Approver -3
No Approver
Client
Google
Recruiters
Rose Mary
JOB DETAILS
Job Title
Employee
Job Description
...
Required Skills
QA, SQL and Automation
Additional Information
...
Candidate details
Candidate Name
Candidate Status
No data found
REQUISITION HISTORY
Requisition status has been changed as Approved by Anderson Neo
2016-12-19 11:23 PM
Requisition status has been Approved by Andrew Joel
2016-12-14 02:17 AM
Requisition has been Created by Anderson Neo
2016-12-14 02:11 AM

8. Background Check

Background Check module enables the Pre and Post-Employment screening process. You can configure the screening types and manage the agencies you wish to work with. Below is the Background Check process flowchart.



Description:

- A User (Management, HR) selects an employee or candidate to have a background check performed on him/her

- The User selects the screening type and an agency for that screening type
- An External User (Agency User) logs into the application and provide details/feedback about the employee/candidate.
- The User views the feedback and provides his/her own comments.
- The User closes the process.

8.1 How do I add a Screening Type?

Please refer Figure 115

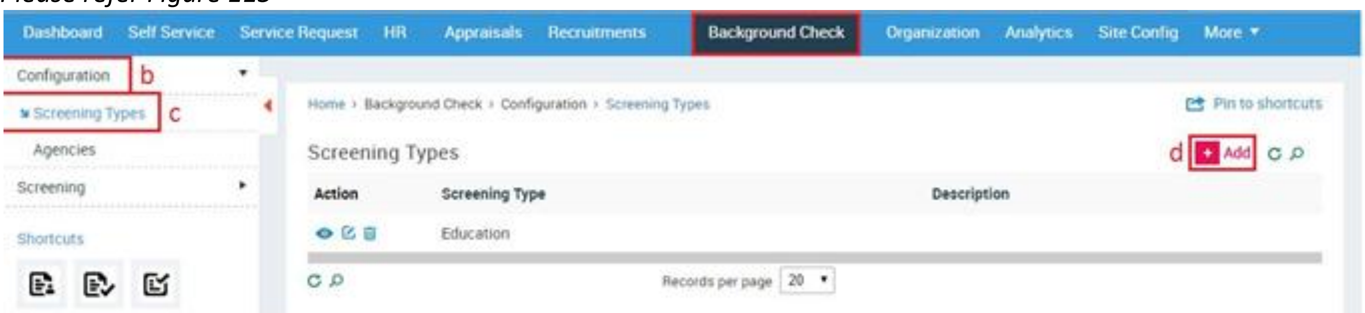


Figure 115

a. Click **Background Check** in the top menu
b. Click **Configuration** on the left menu panel
c. Click **Screening Types** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 116

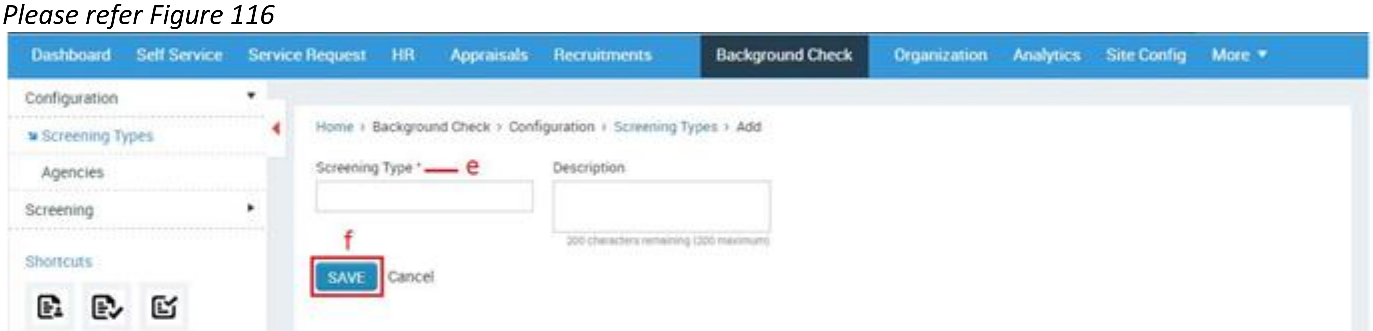


Figure 116

e. Enter the required details
f. Click **SAVE** button

8.2 How do I add an Agency?

Please refer Figure 117

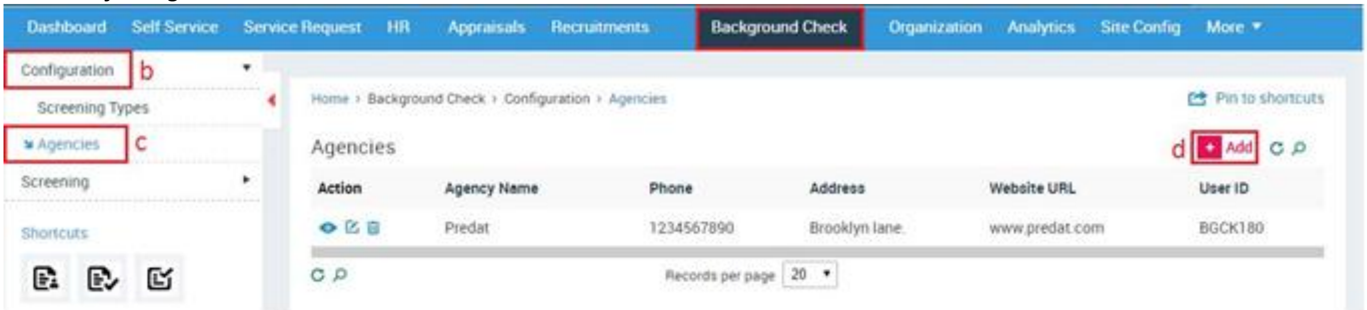


Figure 117

a. Click **Background Check** in the top menu
b. Click **Configuration** on the left menu panel
c. Click **Agencies** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 118

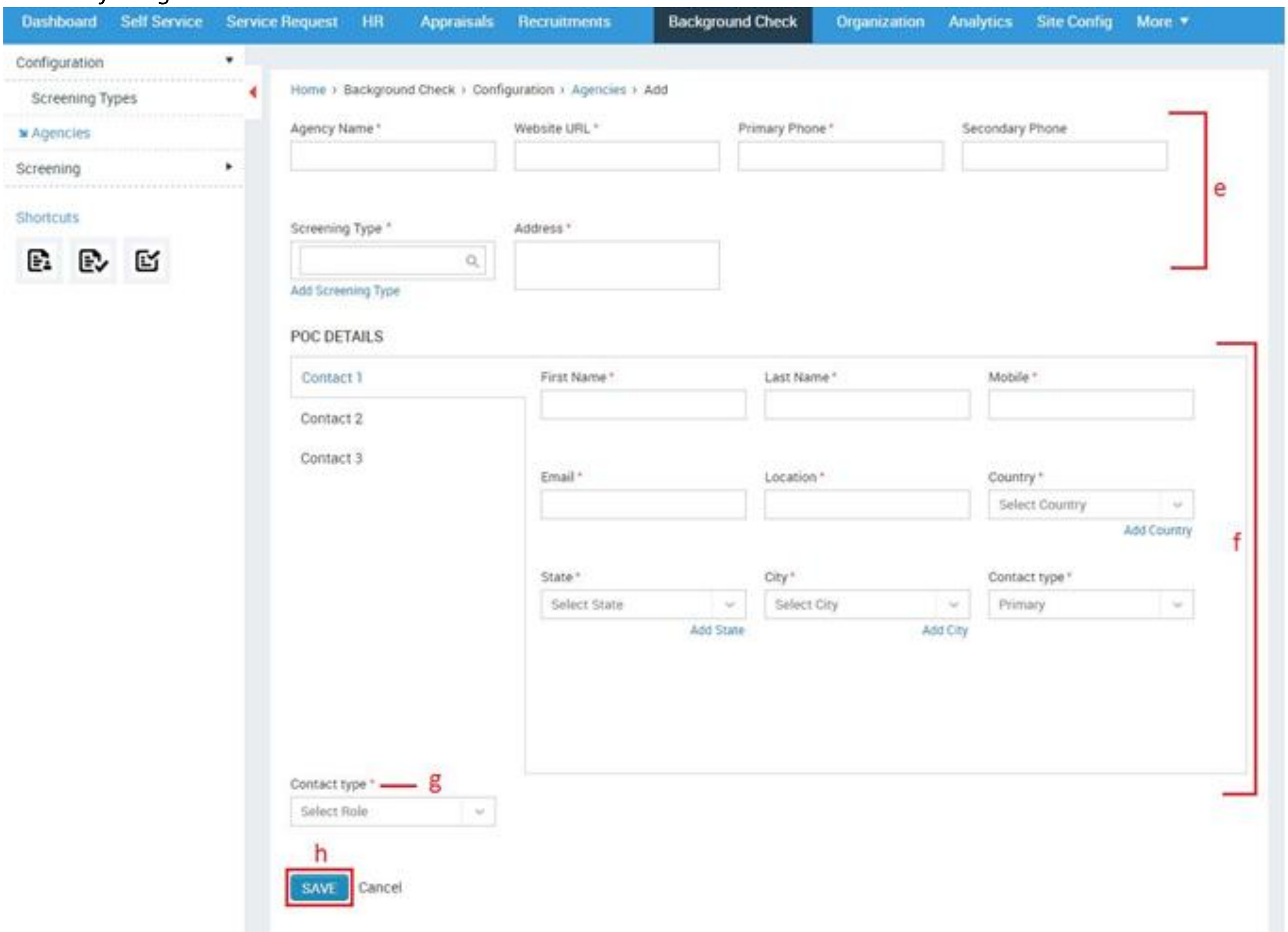


Figure 118

e. Enter the required details
f. Enter POC (Point of Contact) details
g. Enter Contact Type (The roles created for an external user will be populated here. Please refer section <u>6.2 How do I add Roles & Privileges</u>)
h. Click **SAVE** button

8.3 How do I select an Employee/Candidate for Screening?

Please refer Figure 119

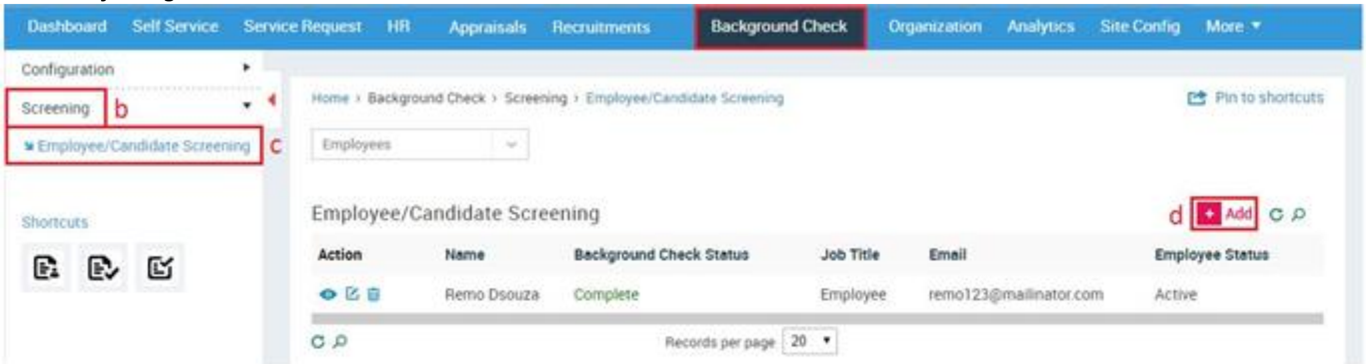


Figure 119

a. Click **Background Check** in the top menu
b. Click **Screening** on the left menu panel
c. Click **Employee/Candidate Screening** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 120

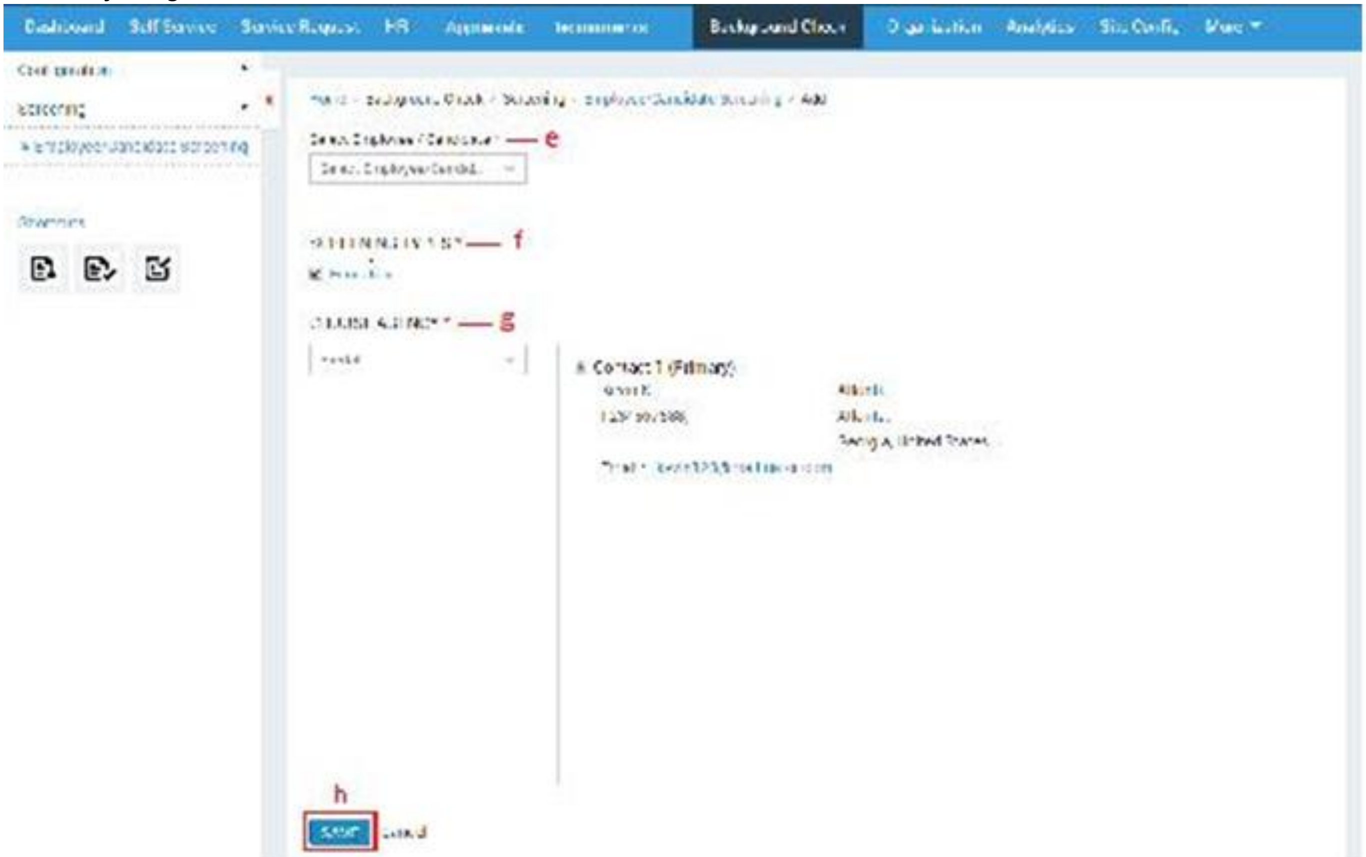


Figure 120

e. Select an Employee/Candidate
f. Select a Screening Type
g. Choose the agency
h. Click **SAVE** button

8.4 How do I set up HR and Management Group Emails?

Please refer Figure 121

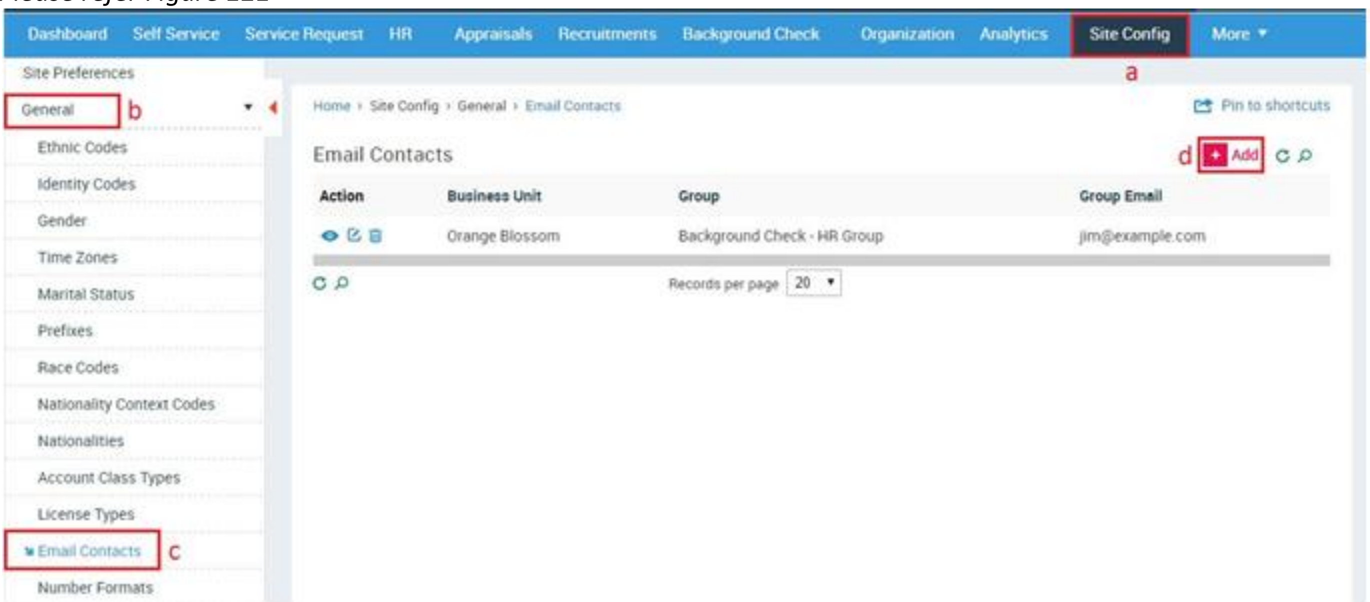


Figure 121

a. Click **Site Config** on the top menu
b. Click **General** on the left menu panel
c. Click **Email Contacts** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 122

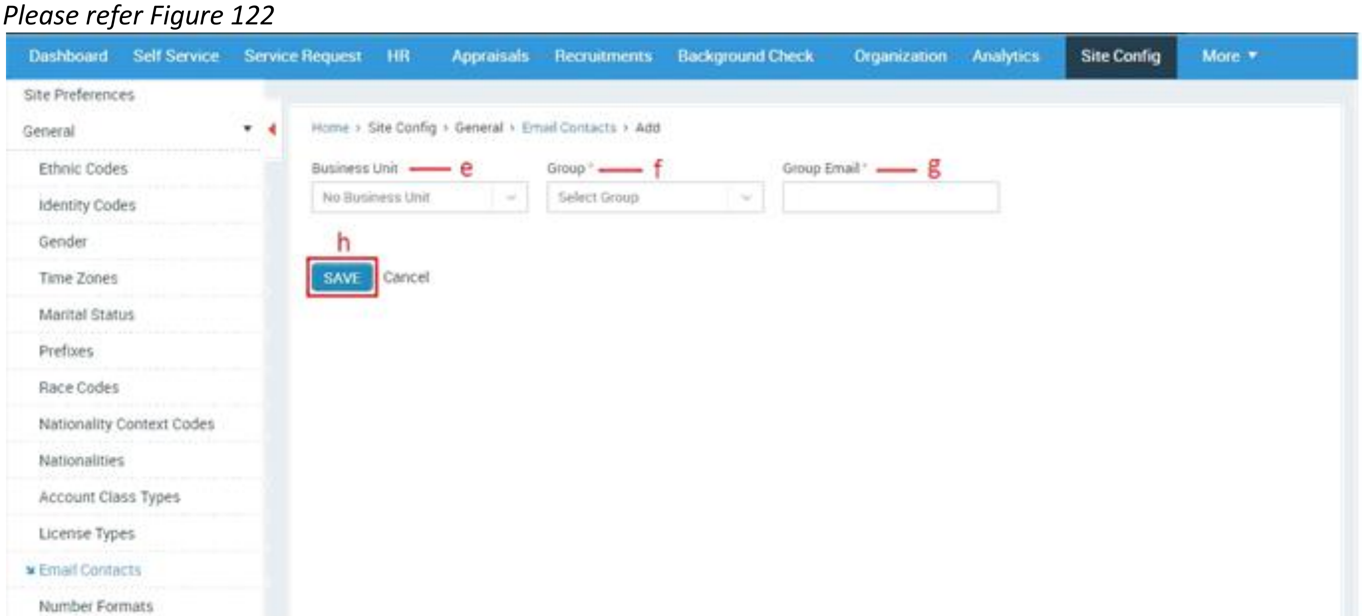


Figure 122

e. Select the business unit the HR group
f. Select ‘Background Check – HR Group’ (HR)/ ‘Background Check’ Management Group (Management)
g. Enter group email id
h. Click **SAVE** button

Every HR/Management group email must be unique for a Business Unit.
If repeated, you will get an error message saying
Group email already exists.

8.5 How do I provide Feedback as an External User?

Please refer Figure 123

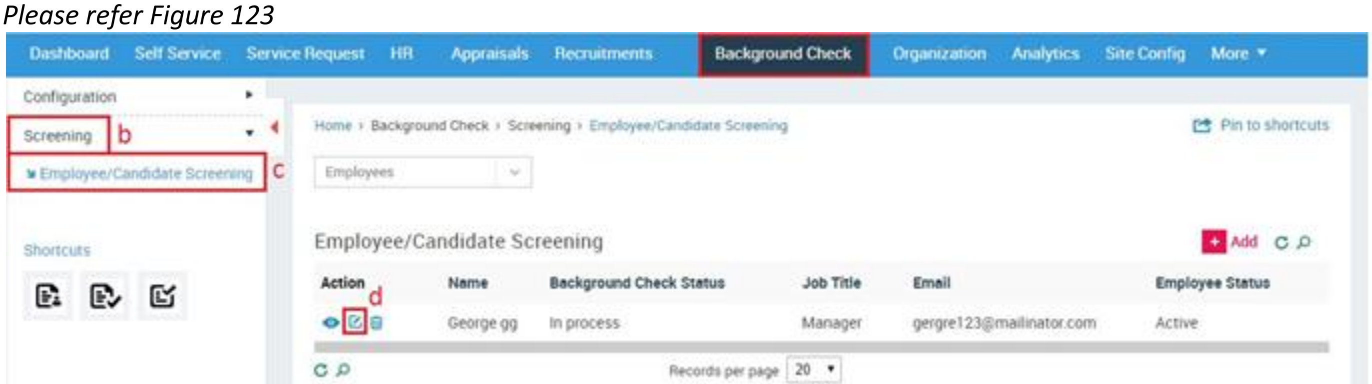


Figure 123

a. Click **Background Check** in the top menu
b. Click **Screening** on the left side panel
c. Click **Employee/Candidate Screening** in the submenu
d. Click **Edit icon** against an employee/candidate name

Please refer Figure 124

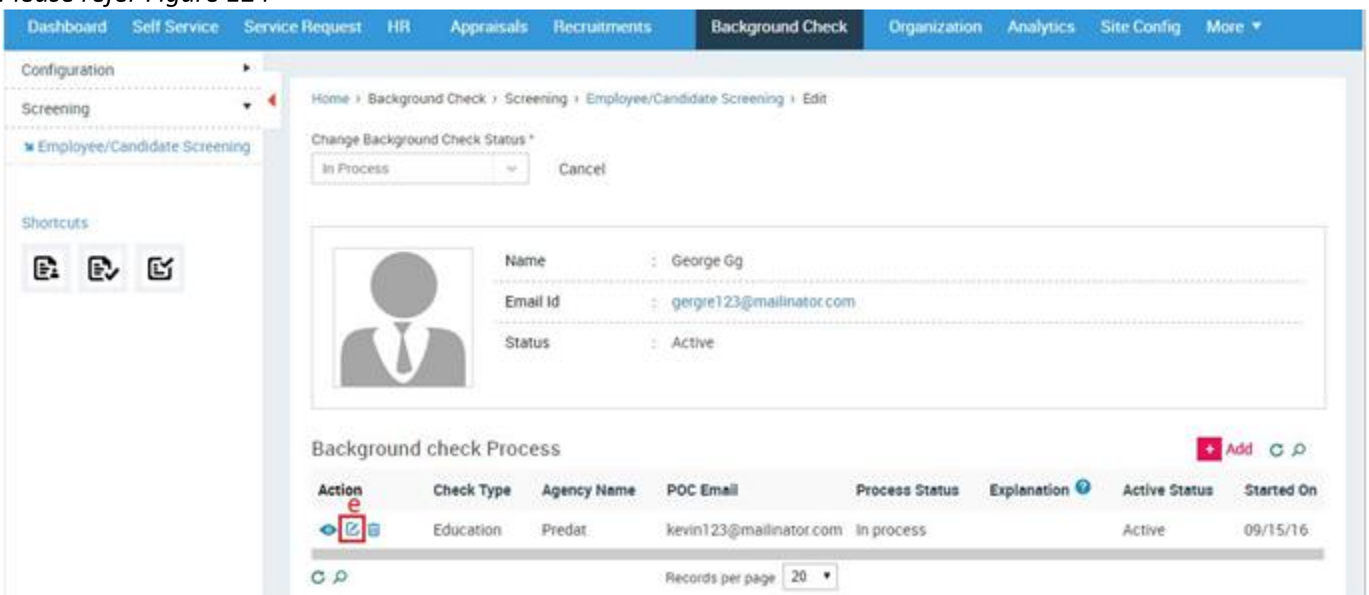


Figure 124

e. Click on the Edit icon against an employee/candidate name in the Background Check Process Grid

Please refer Figure 125

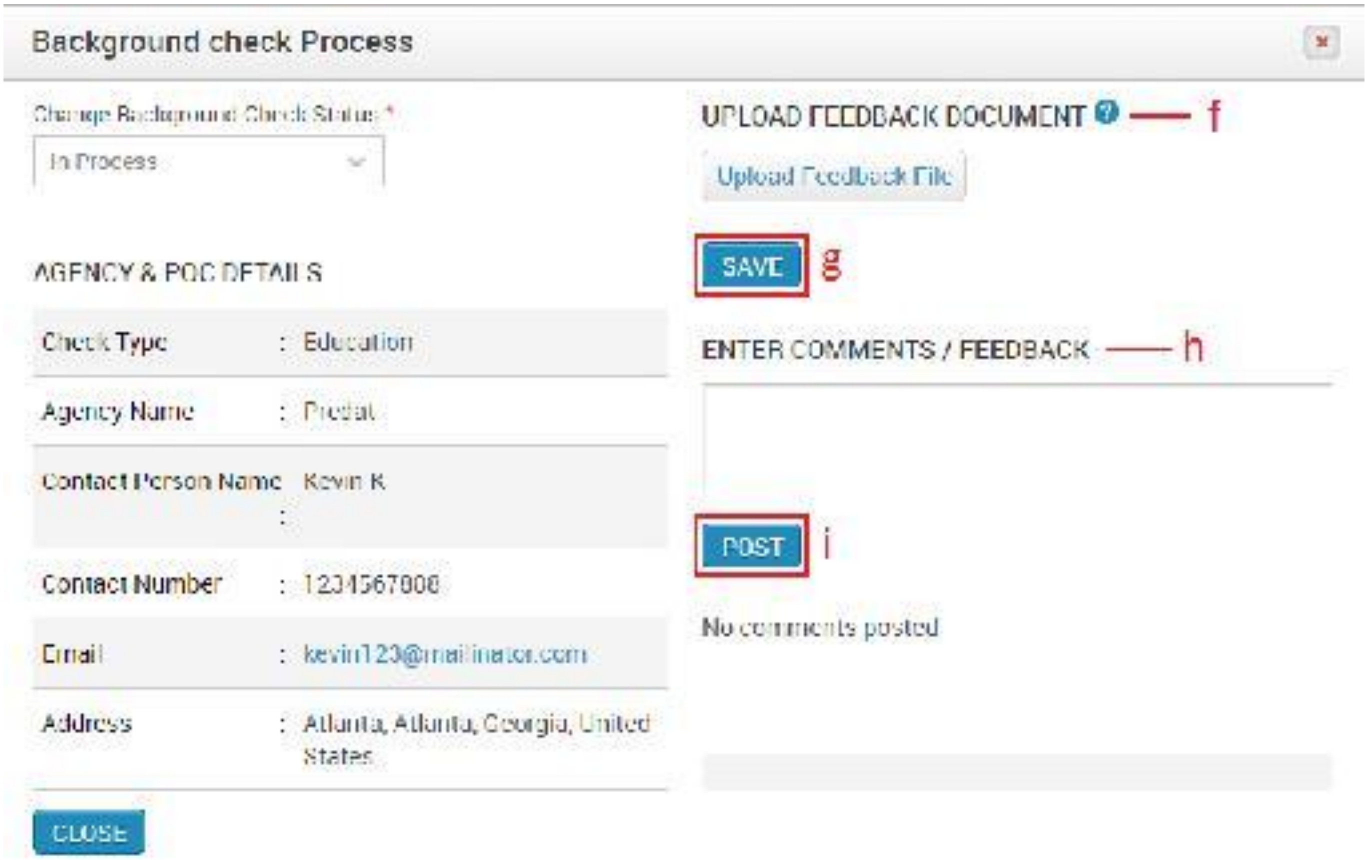


Figure 125

f. Upload feedback documents
g. Click **SAVE** button
h. Enter comments/feedback
i. Click **POST** button

8.6 How do I close a Background Check Process?

Please refer Figure 126

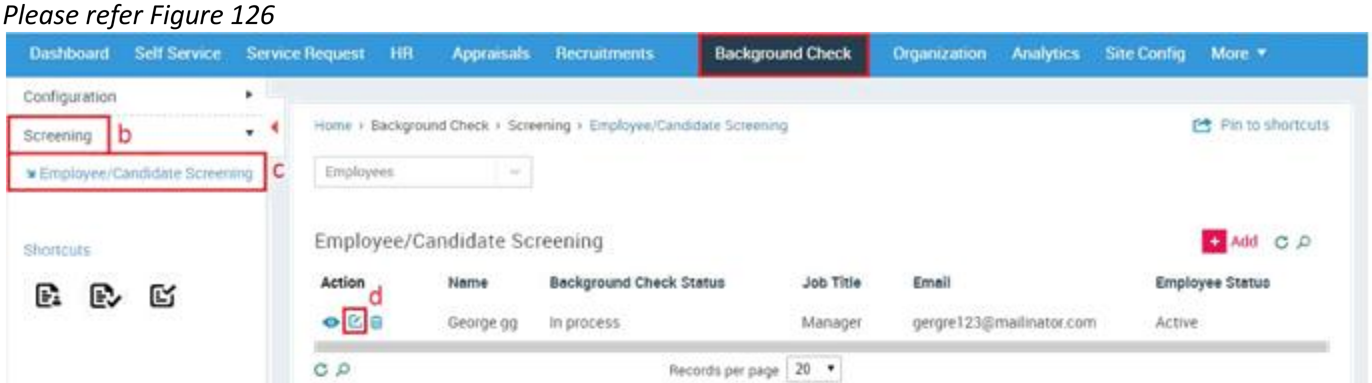


Figure 126

a. Click **Background Check** in the top menu
b. Click **Screening** on the left menu panel
c. Click **Employee/Candidate Screening** in the submenu
d. Click **Edit** icon against an employee/candidate name

Please refer Figure 127

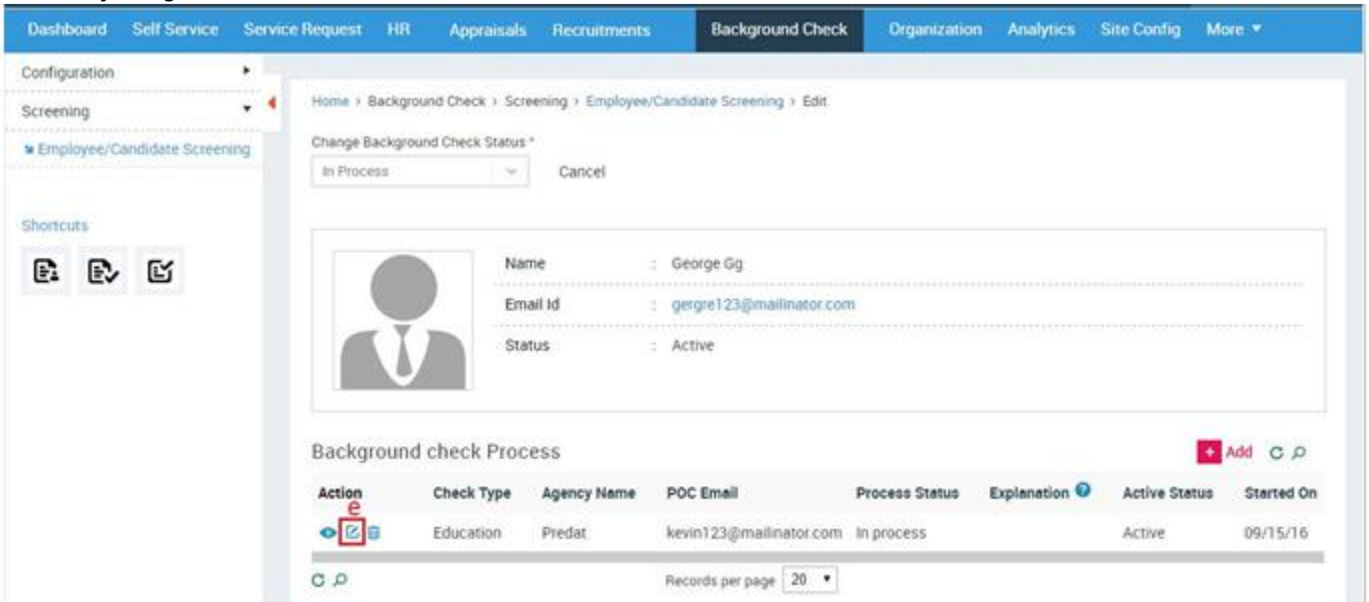


Figure 127

To close a specific Background process:

e. Click on the Edit icon against an employee/candidate name in the Background Check Process Grid

Please refer Figure 128

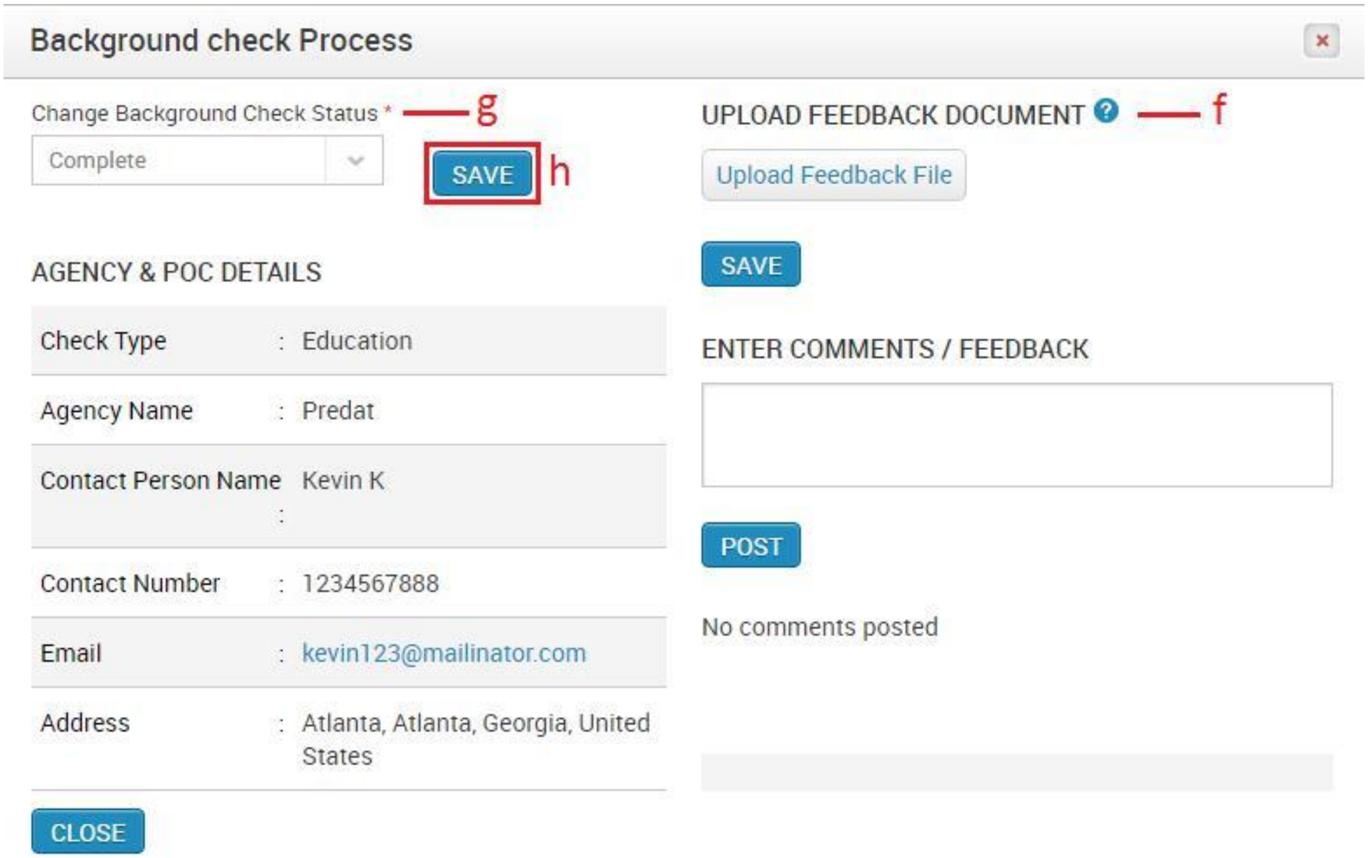


Figure 128

f. You can upload feedback documents or enter comments
g. Select **'Complete'** for the Background Check Status
h. Click **SAVE** button

Please refer Figure 129

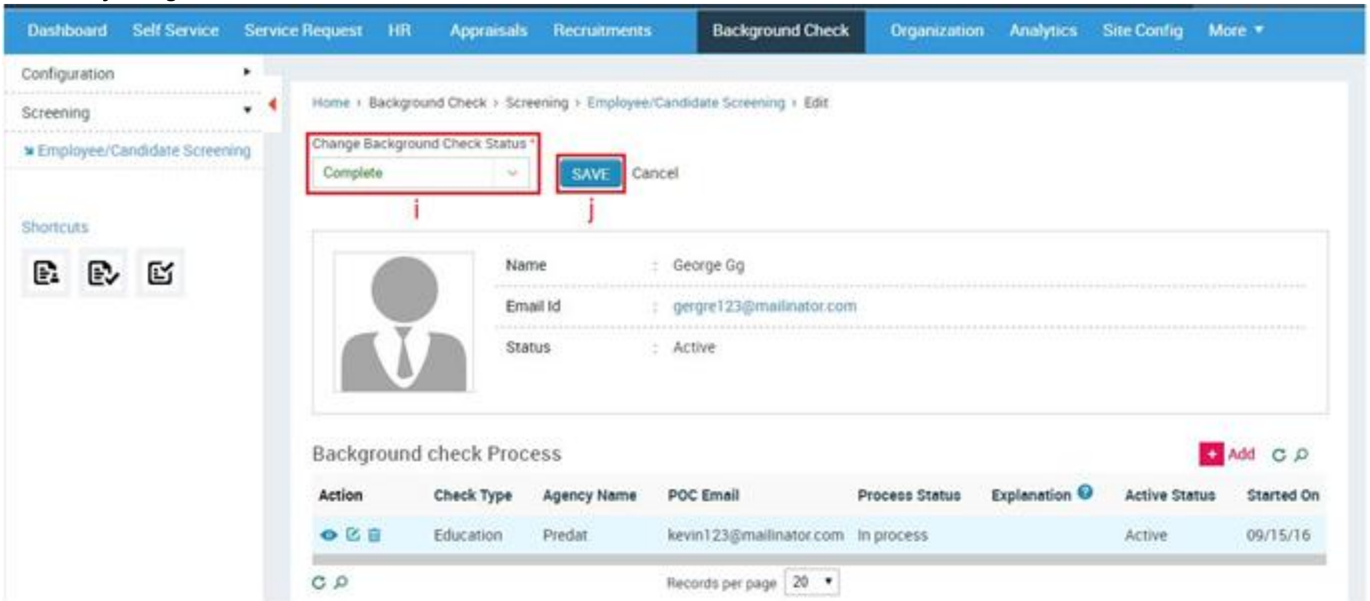


Figure 130

To close all Background processes for an employee:

i. Select **'Complete'** for the Background Check Status
j. Click **SAVE** button

9. Organization

Organization lets you can manage your organizational information, Business Units and Departments, Announcements and Policy Documents.

9.1 How do I view/edit information about my Organization?

This information was first given in the Step 3: Organization of the Configuration Wizard.

Please refer Figure 131

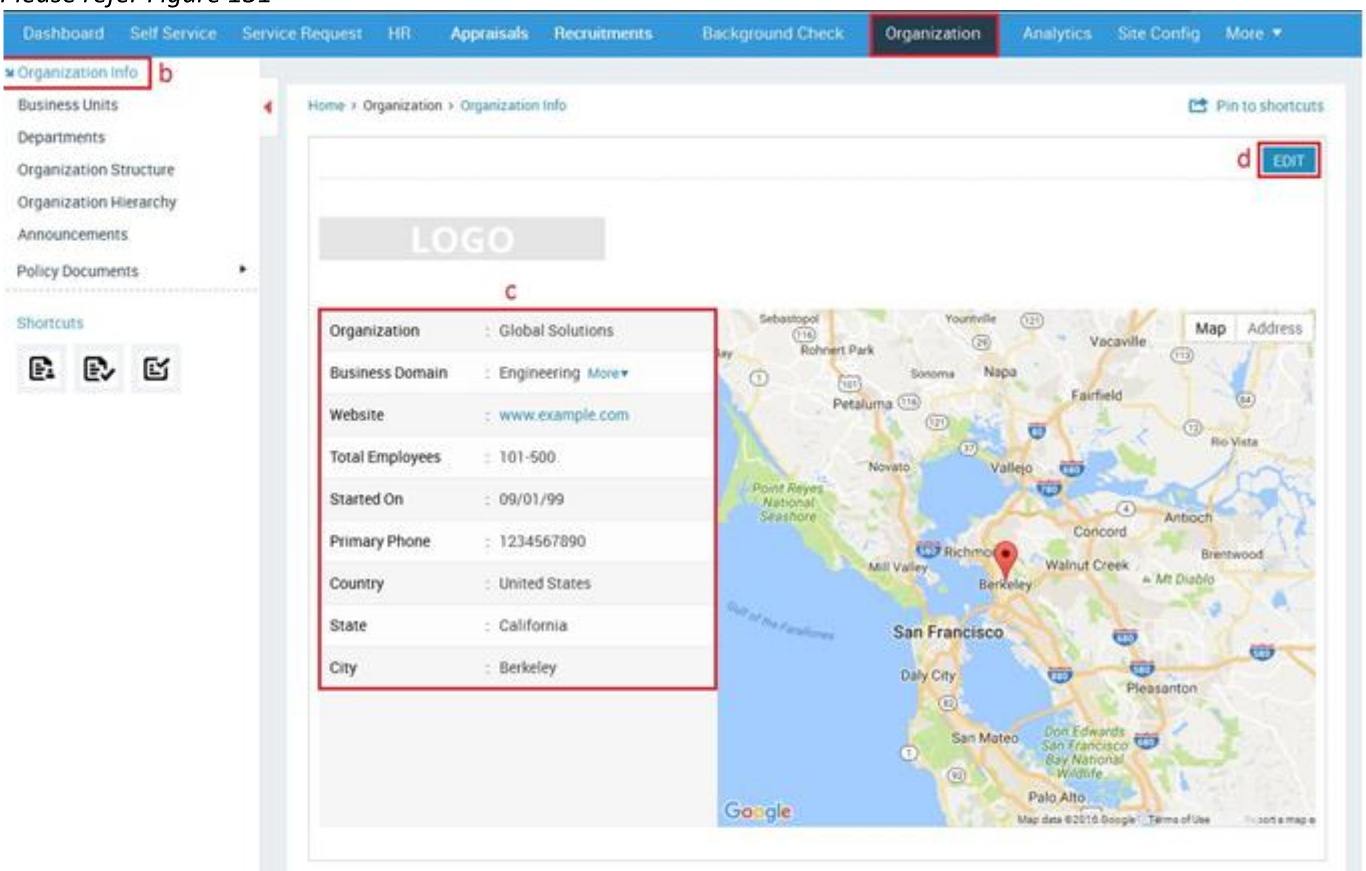


Figure 131

a. Click **Organization** in the top menu
b. Click **Organization Info** on the left menu panel
c. Your organization's details will be displayed here
d. Click **Edit** icon to modify details

Please refer Figure 132

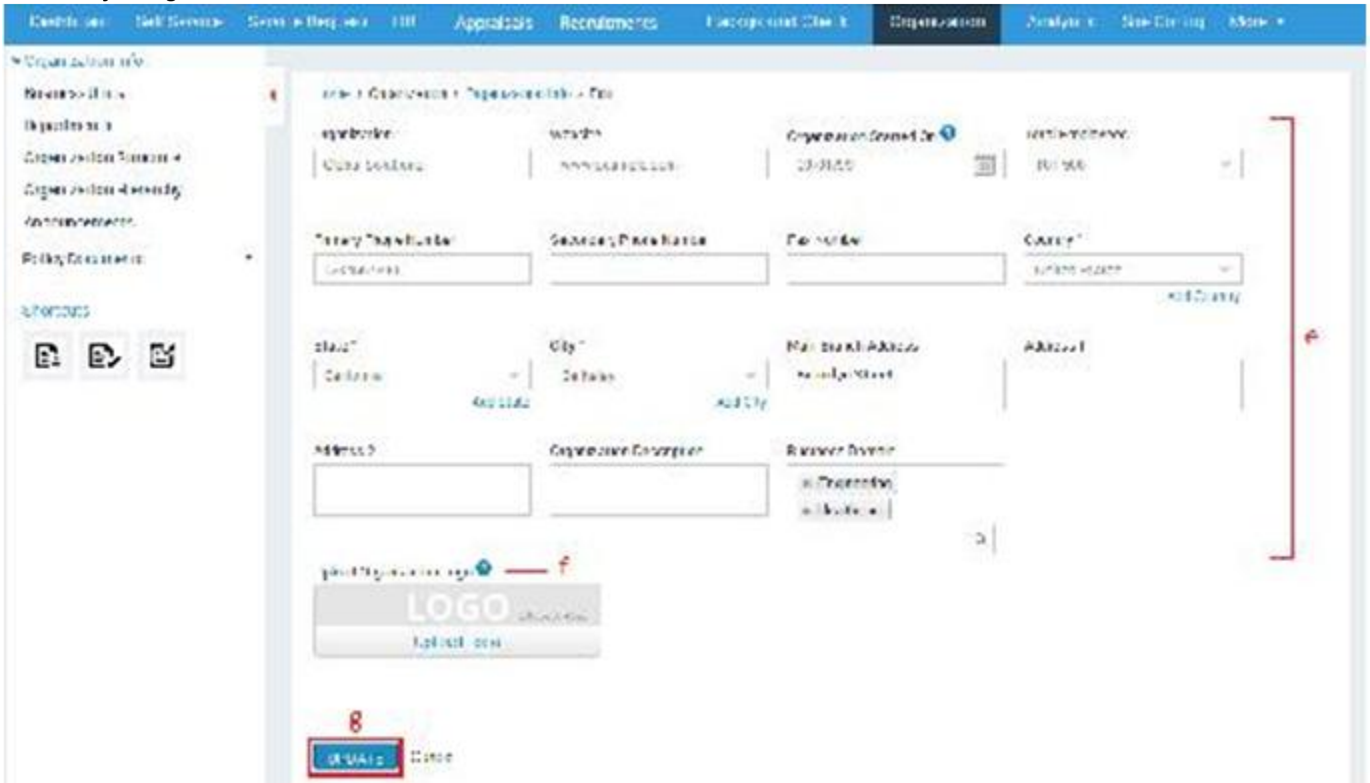


Figure 132

e. Enter or modify details
f. You can change your company logo
g. Click **UPDATE** button

Business Units & Departments

Please refer to section 1.5 How do I add Business Units and Departments?

9.2 How do I view my Organization Structure?

Please refer Figure 133

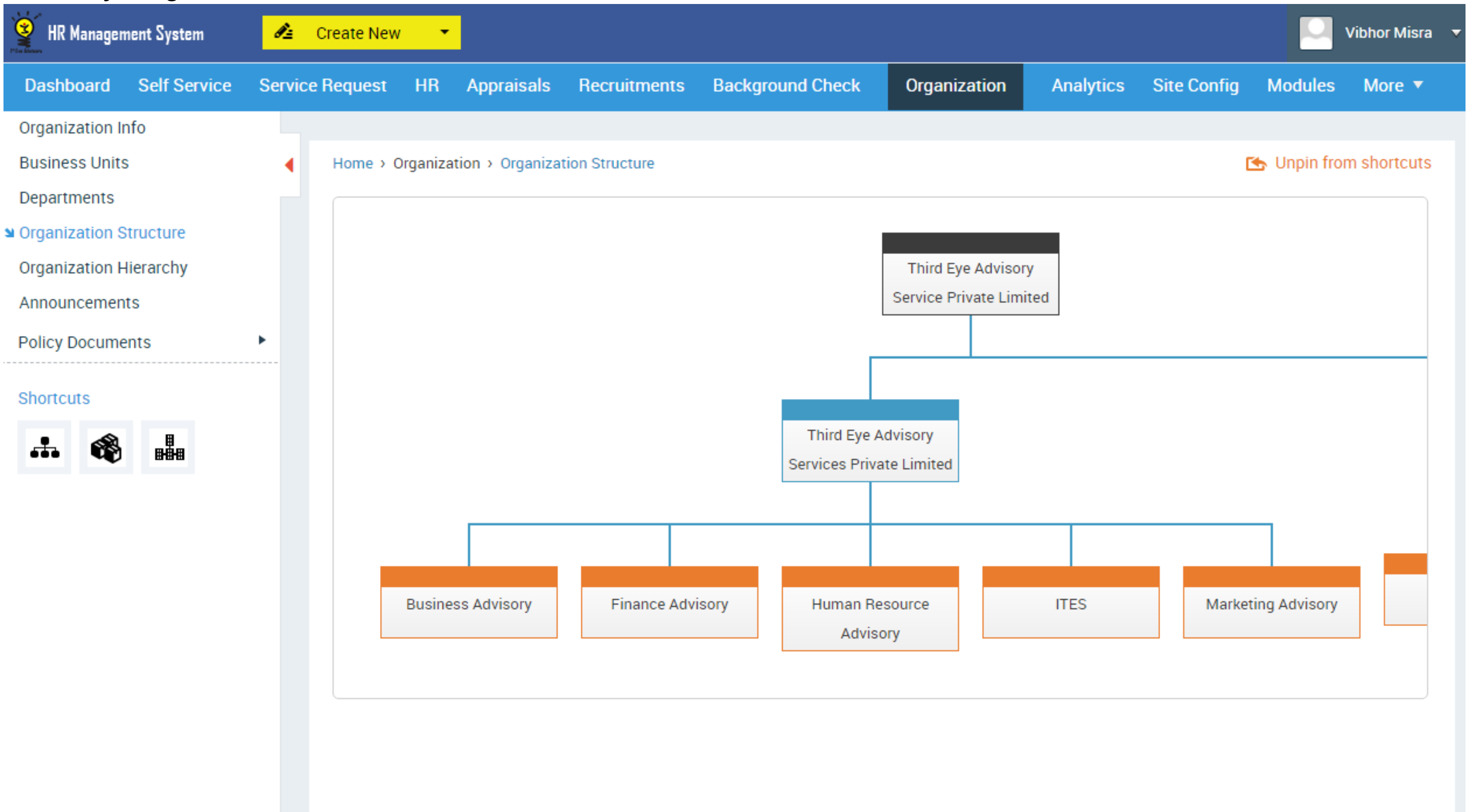


Figure 133

a. Click **Organization** in the top menu
b. Click **Organization Structure** on the left side panel
c. Your Organization Structure will be displayed here

The Organization Structure is for display purpose only and cannot be edited. It is formed according to the Business Units and Departments you add in the application.

9.3 How do I view my Organization Hierarchy?

Please refer Figure 134

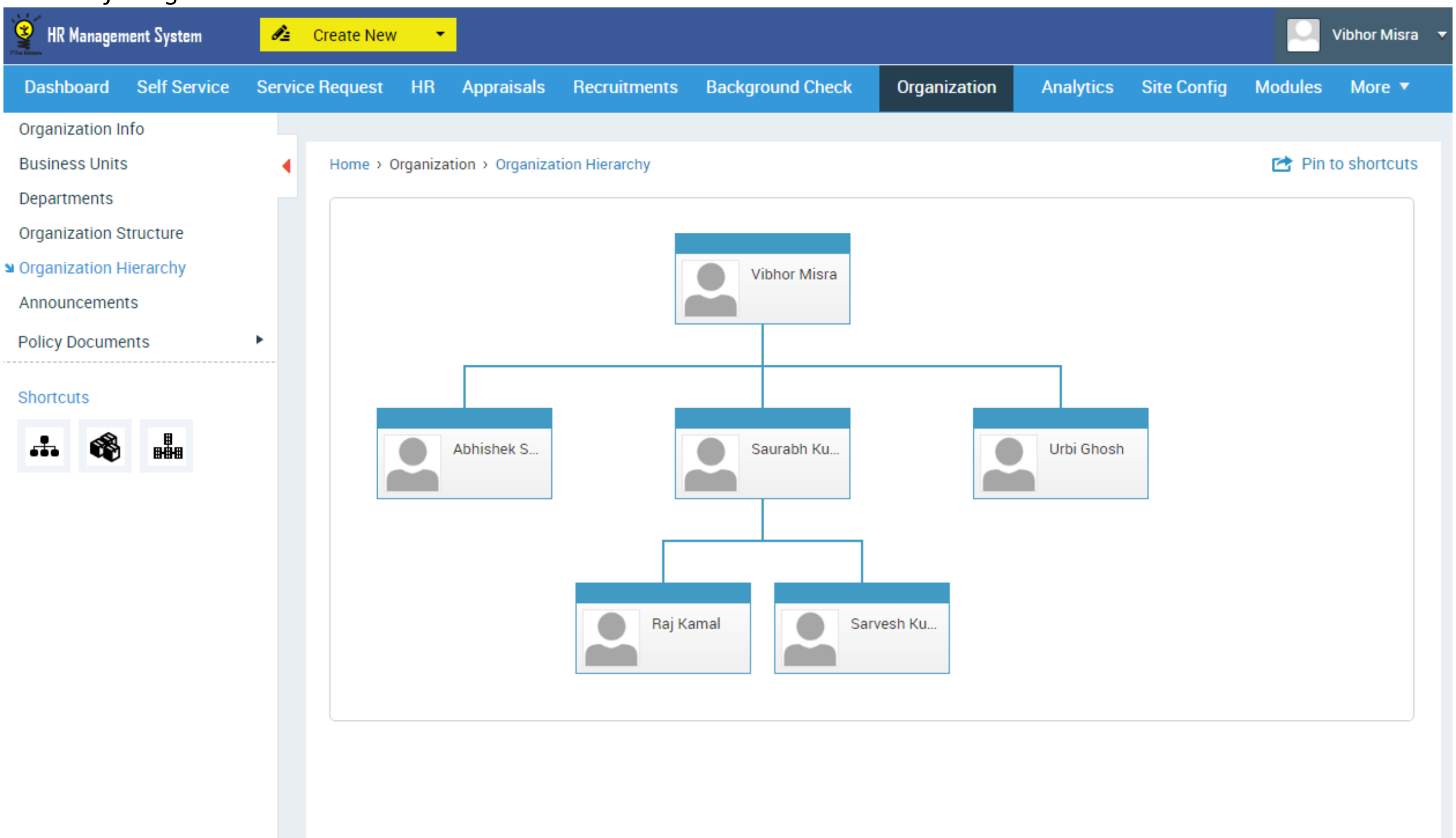


Figure 134

a. Click **Organization** in the top menu
b. Click **Organization Hierarchy** on the left menu panel
c. Your Organization Hierarchy will be displayed here

The Organization Hierarchy is for display purpose only and cannot be edited. It is formed according to the employees you add to the application.

9.4 How do I add Announcements?

Refer section How do I add Announcements?

9.5 How do I add Policy Documents?

Users will have access to view essential documents whenever required. You can easily access & store all the organization's important policy documents

Please refer Figure 135

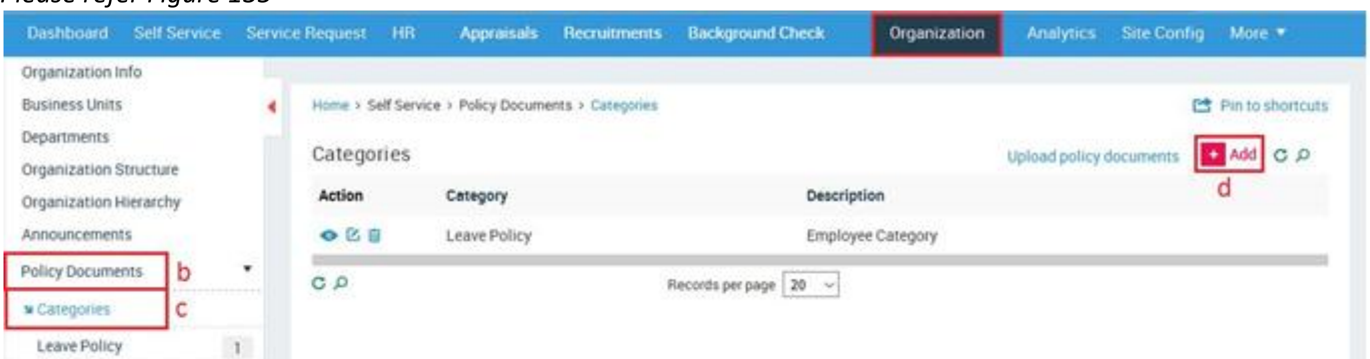


Figure 135

a. Click **Organization** menu option
b. Click **Policy Documents** on the left menu panel
c. Click **Categories** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 136

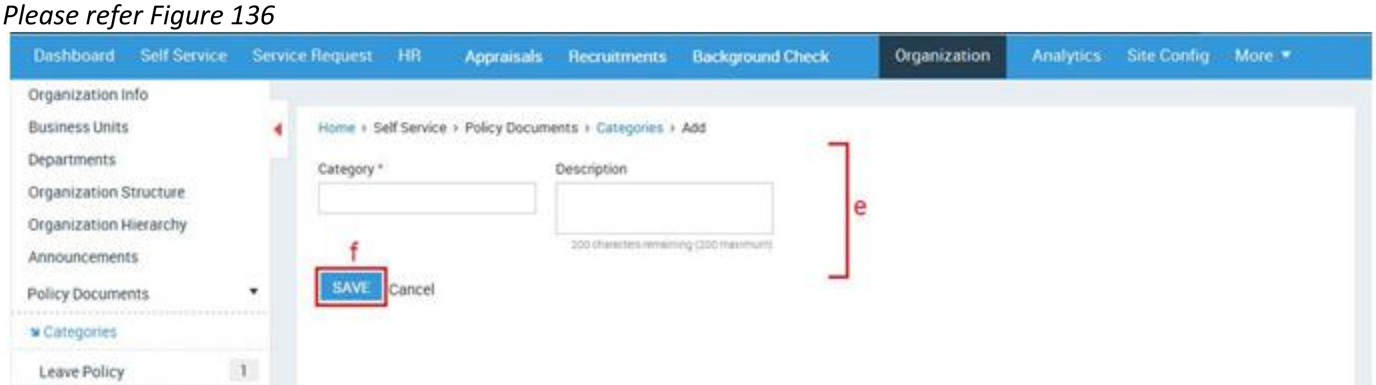


Figure 136

e. Enter the required details
f. Click **SAVE** button

Please refer Figure 137

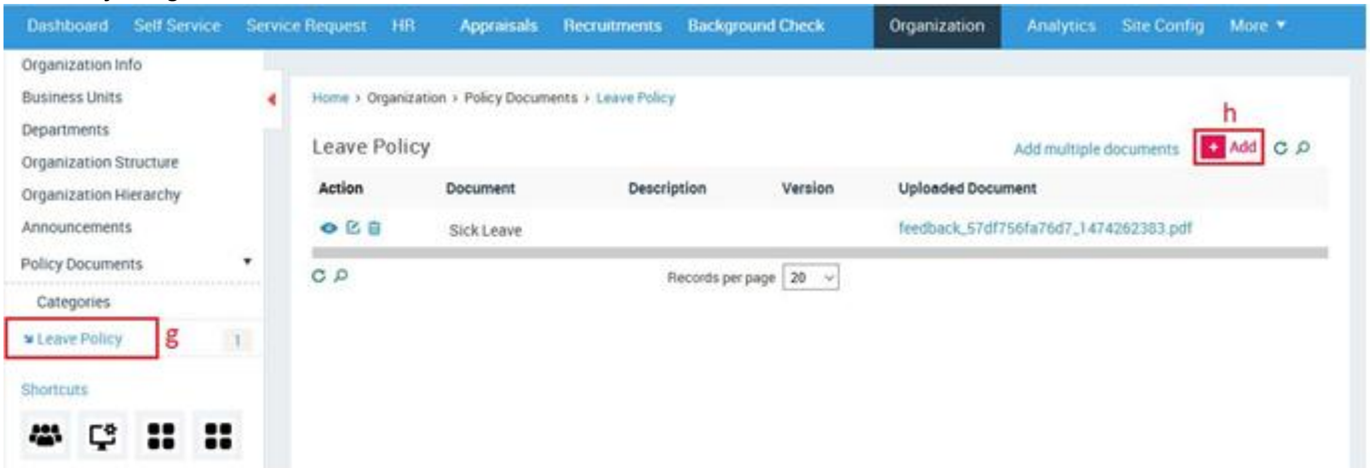


Figure 137

g. Click on the category name in the sub menu (we have selected 'Leave Policy' as an example)
h. Click **+Add** button

Please refer Figure 138

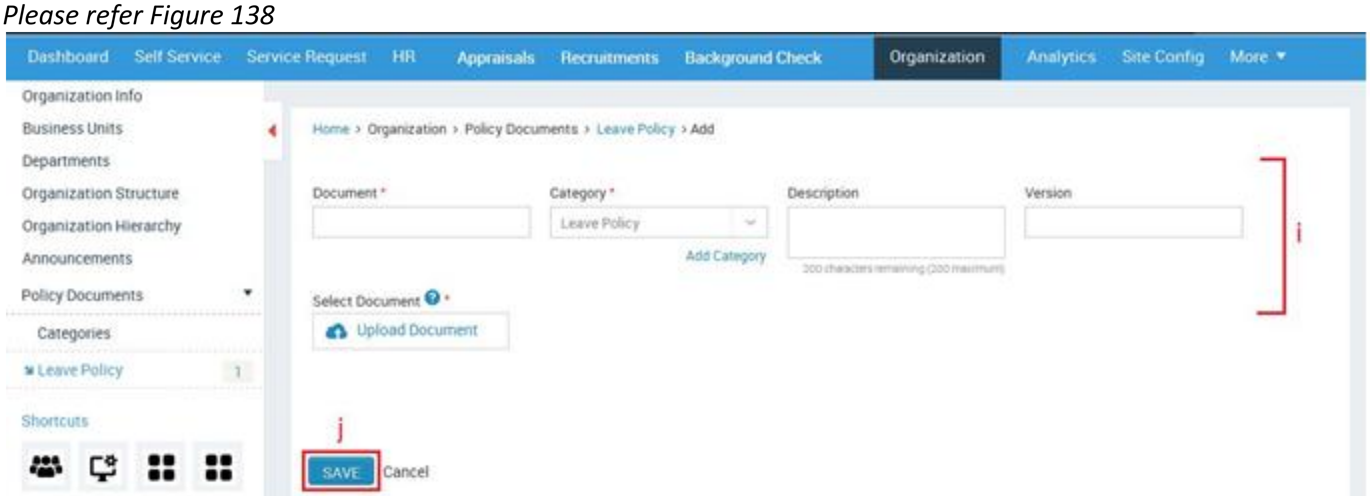


Figure 138

i. Enter the required details
j. Click **+Add** button

9.6 How do I view Policy Documents?

Please refer Figure 139

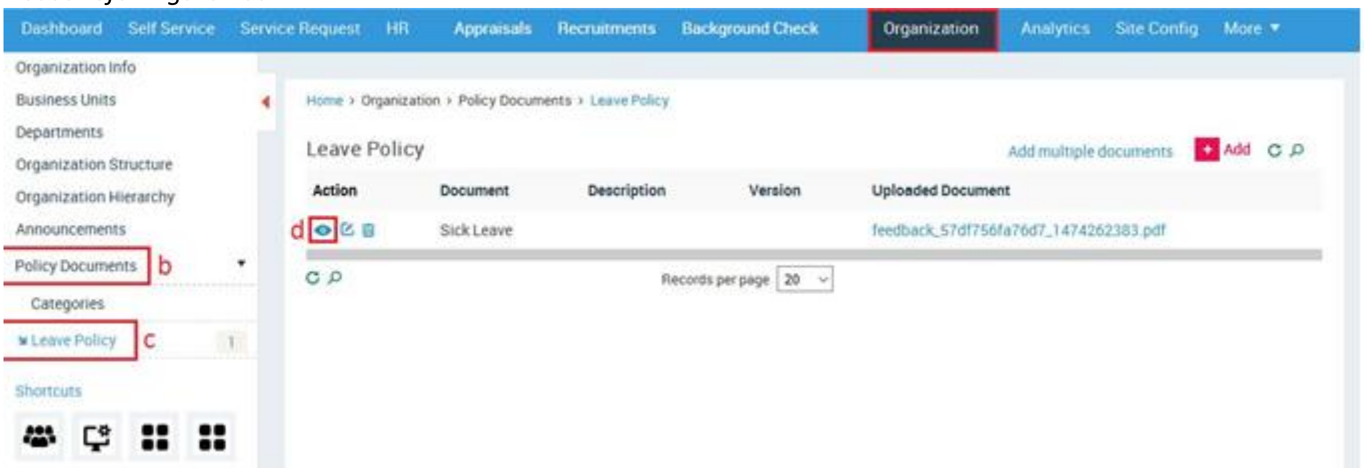


Figure 139

a. Click **Organization** in the top menu
b. Click **Policy Documents** on the left menu panel
c. Click on the category name you want to view (We have used 'Leave Policy' here as an example)
d. Click on the **View** icon against a document name

If a user is not able to view Policy Documents, go to HR > User Management > Roles & Privileges and check whether the user's role has been granted privilege to view Policy Documents.

10. Analytics

Analytics uses descriptive techniques to represent your organization's data and allows you to generate custom reports and then export them to Excel or PDF.

Your organizational data such as Employee Status, Employees on Leave, Attrition Rate will be presented in the form of pie charts, line and bar graphs. Click on **Analytics** in the top menu option to view the charts/graphs.

10.1 How do I view/generate Reports?

Please refer Figure 140

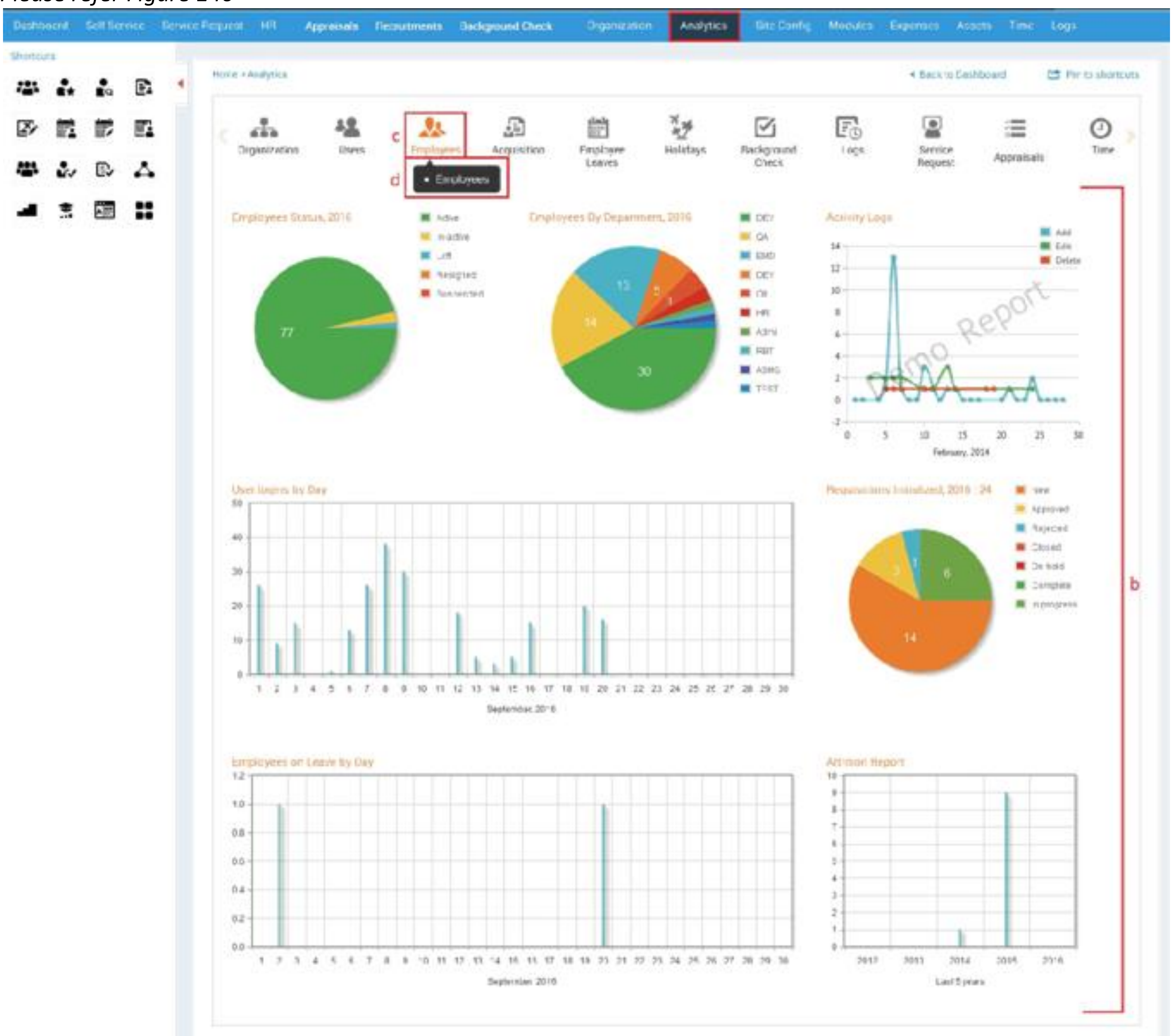
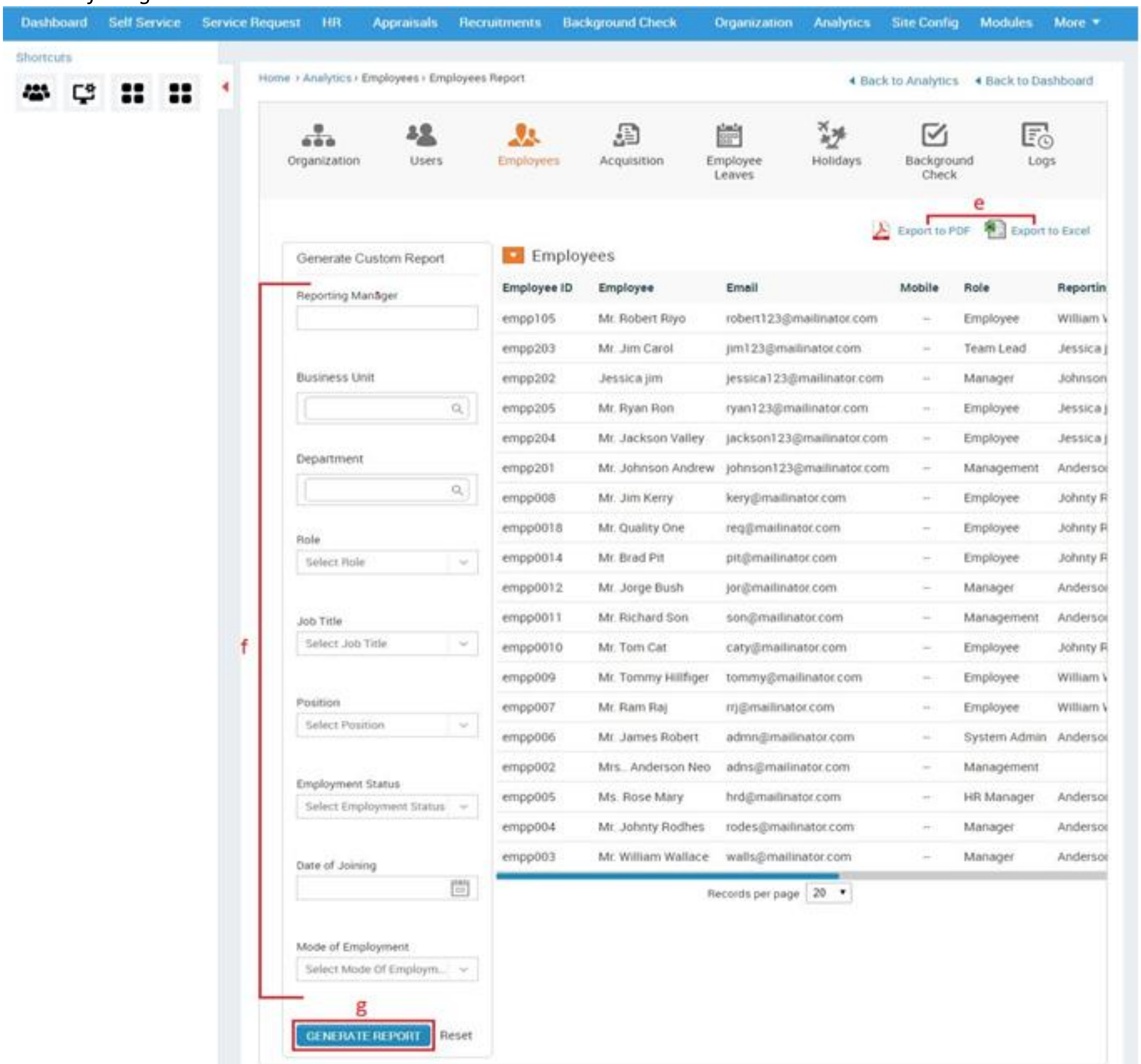


Figure 140

a. Click **Analytics** in the top menu
b. You will be redirected to Analytics page where graphical representation of organization statistics are displayed
c. Click on a menu item in the Analytics menu

d. Click on the corresponding submenu

Please refer Figure 141



Employee ID	Employee	Email	Mobile	Role	Reportin
empp105	Mr. Robert Riyo	robert123@mailinator.com	--	Employee	William V
empp203	Mr. Jim Carol	jim123@mailinator.com	--	Team Lead	Jessica j
empp202	Jessica jim	jessica123@mailinator.com	--	Manager	Johnson
empp205	Mr. Ryan Ron	ryan123@mailinator.com	--	Employee	Jessica j
empp204	Mr. Jackson Valley	jackson123@mailinator.com	--	Employee	Jessica j
empp201	Mr. Johnson Andrew	johnson123@mailinator.com	--	Management	Anderso
empp008	Mr. Jim Kerry	kery@mailinator.com	--	Employee	Johnty R
empp0018	Mr. Quality One	req@mailinator.com	--	Employee	Johnty R
empp0014	Mr. Brad Pit	pit@mailinator.com	--	Employee	Johnty R
empp0012	Mr. Jorge Bush	jor@mailinator.com	--	Manager	Anderso
empp0011	Mr. Richard Son	son@mailinator.com	--	Management	Anderso
empp0010	Mr. Tom Cat	caty@mailinator.com	--	Employee	Johnty R
empp009	Mr. Tommy Hillfiger	tommy@mailinator.com	--	Employee	William V
empp007	Mr. Ram Raj	rrj@mailinator.com	--	Employee	William V
empp006	Mr. James Robert	admn@mailinator.com	--	System Admin	Anderso
empp002	Mrs.. Anderson Neo	adns@mailinator.com	--	Management	
empp005	Ms. Rose Mary	hrd@mailinator.com	--	HR Manager	Anderso
empp004	Mr. Johnty Rodhes	rodes@mailinator.com	--	Manager	Anderso
empp003	Mr. William Wallace	walls@mailinator.com	--	Manager	Anderso

Figure 141

e. In the selected submenu page, click on Export to PDF or Export to Excel to generate report Or, to generate custom reports

f. Provide the specifications required to generate report

g. Click **GENERATE REPORT** to generate a custom report

11. Site Config

Site Configuration allows you to configure the standards used in your organization such as locations, currency codes, date formats, ethnic codes, etc.

11.1 How do I view/edit Site Preferences?

This information was first given in the Step 2: Site Config of the Configuration Wizard.

Please refer Figure 142

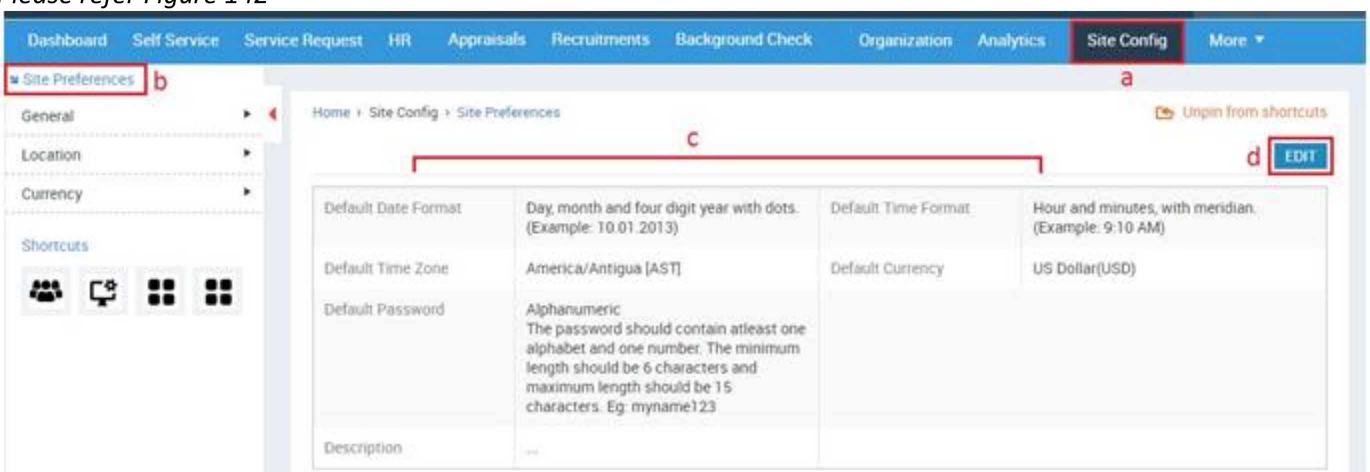


Figure 142

a. Click **Site Config** in the top menu
b. Click **Site Preferences** in the left menu panel
c. You can view your Site Preference details here
d. Click **Edit** icon

Please refer Figure 143

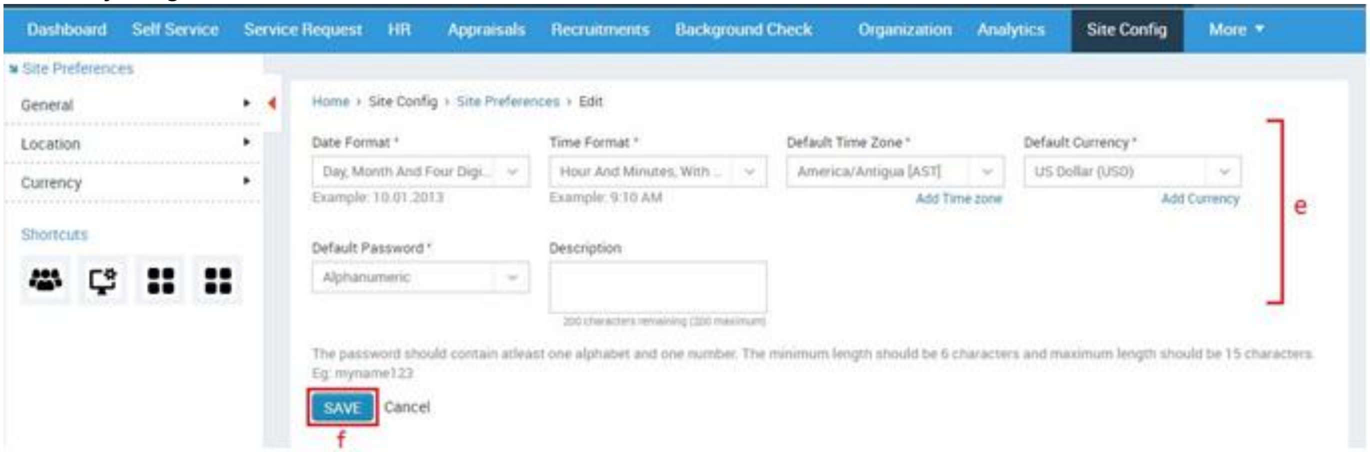


Figure 143

e. Enter/Edit the details
f. Click **SAVE** button

11.2 How do I set General Site Preferences?

You can set general preferences like time zones, nationalities, gender codes, ethnic codes etc. which will be consistent across the entire application.

Please refer Figure 144

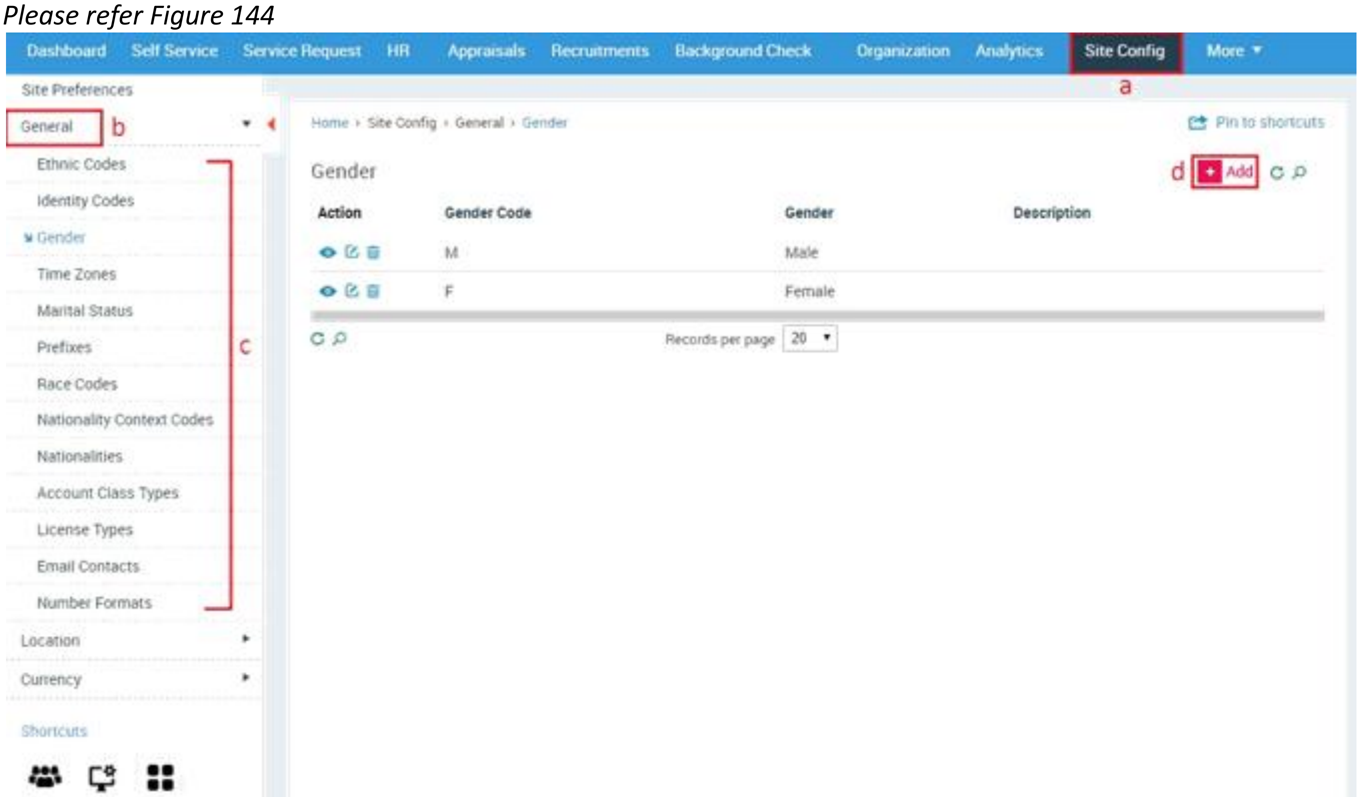


Figure 144

a. Click **Site Config** in the top menu
b. Click **General** on the left menu panel
c. Click on any option in the submenu (We've used Gender as an example)
d. Click **+Add** button

Please refer Figure 145

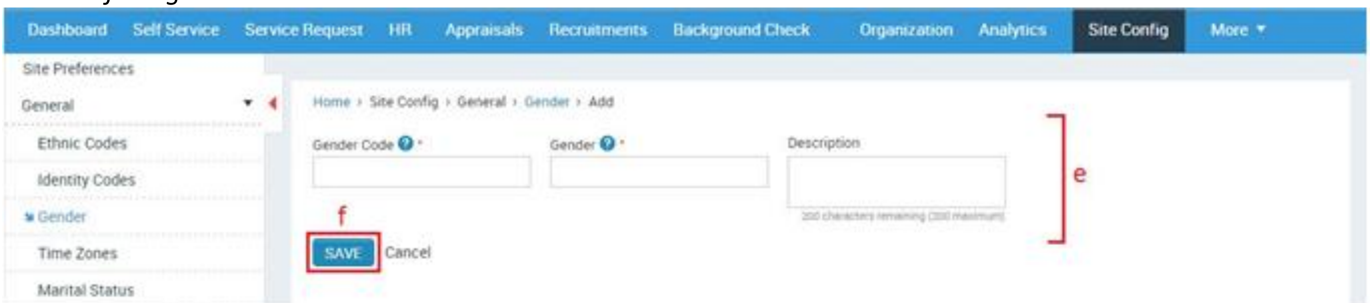


Figure 145

e. Enter/Edit the details
f. Click **SAVE** button

11.3 How do I set Identity Codes?

Identity code is the alphabets used in an Employee ID. For example in the Employee IDs **EMP**0033 and **USER**009, EMP and USER are the identity codes respectively.

Please refer Figure 146

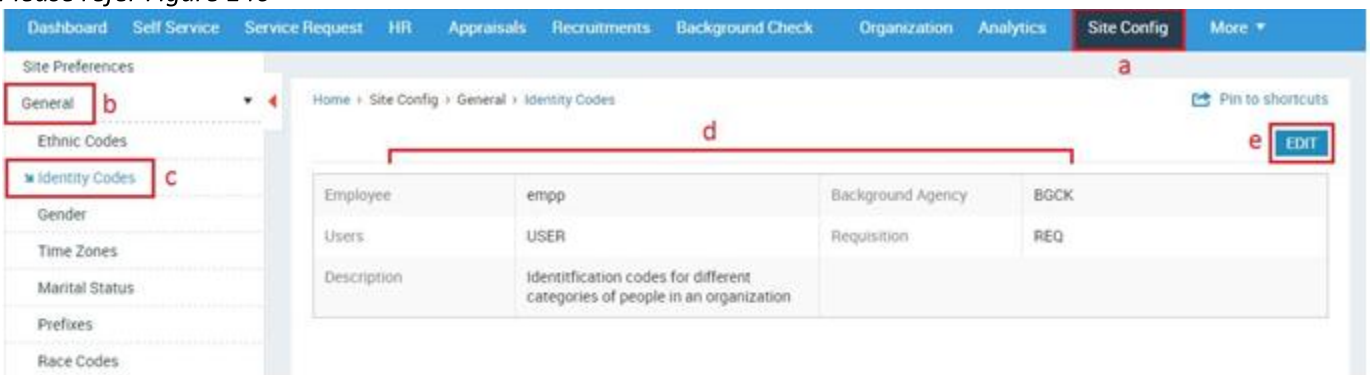


Figure 146

a. Click **Site Config** in the top menu
b. Click **General** on the left menu panel
c. Click **Identity Codes** in the submenu
d. Your default identity code details will be displayed here
e. Click **Edit icon**

Please refer Figure 147

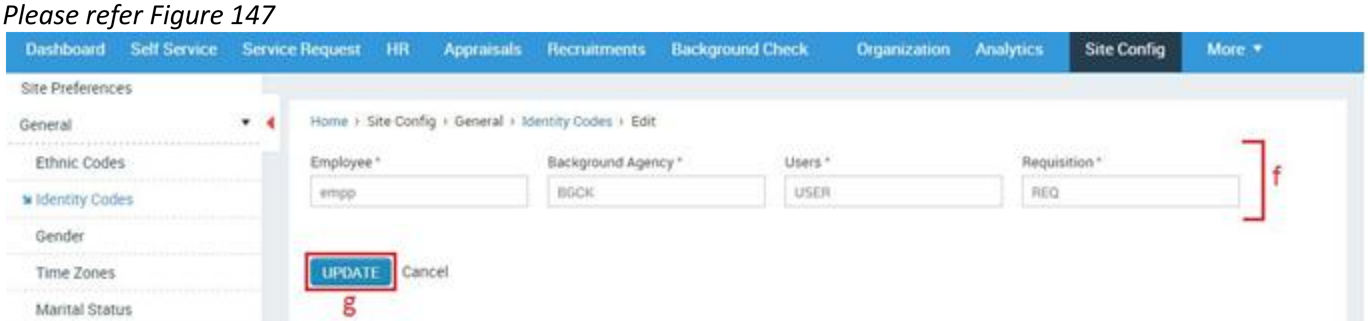


Figure 147

f. Edit the details
g. Click **SAVE** button

11.4 What should I do if my Country/State/City are not available in HRMS?

Please refer Figure 148

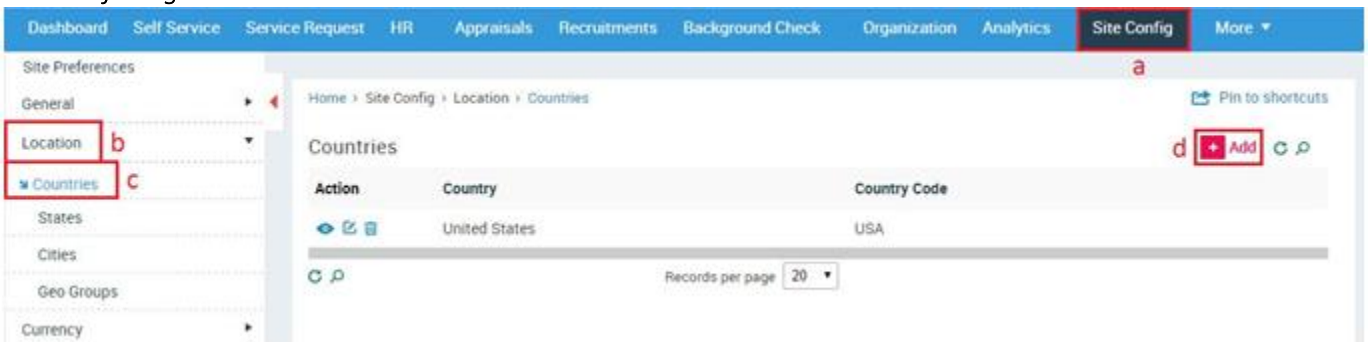


Figure 148

a. Click **Site Config** in the top menu
b. Click **Location** on the left menu panel
c. Click **Countries** in the submenu
d. Click **+Add** button

Please refer Figure 149

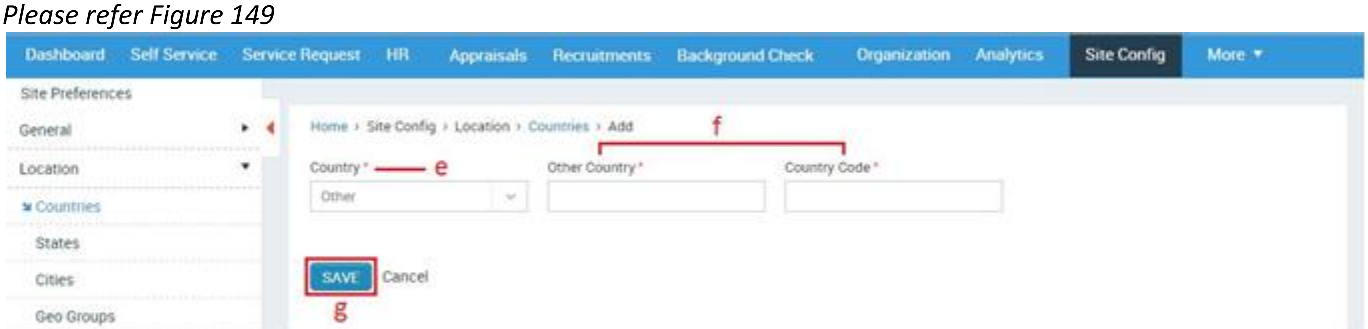


Figure 149

e. Select 'Other' in the Country field
f. Provide Other Country name and code
g. Click **SAVE** button

Once an unavailable 'Country' name is added, it will be appear in the drop down option when you want to add a state or city. You can use the same procedure shown above to add States and Cities not available in the application.

11.5 How do I add Currency and Currency Conversions?

Currencies

Please refer Figure 150

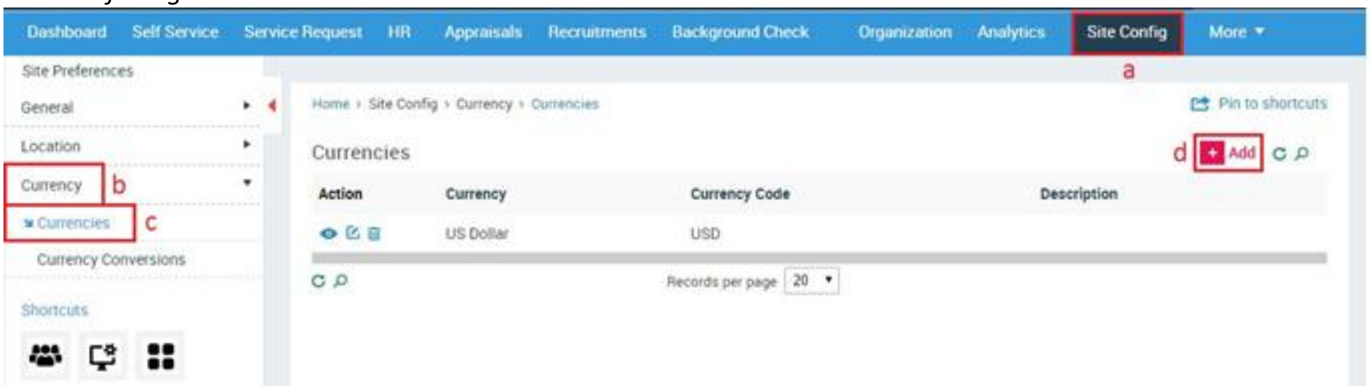


Figure 150

a. Click **Site Config** in the top menu
b. Click **Currency** on the left menu panel
c. Click **Currencies** in the submenu
d. Click **+Add** button

Please refer Figure 151

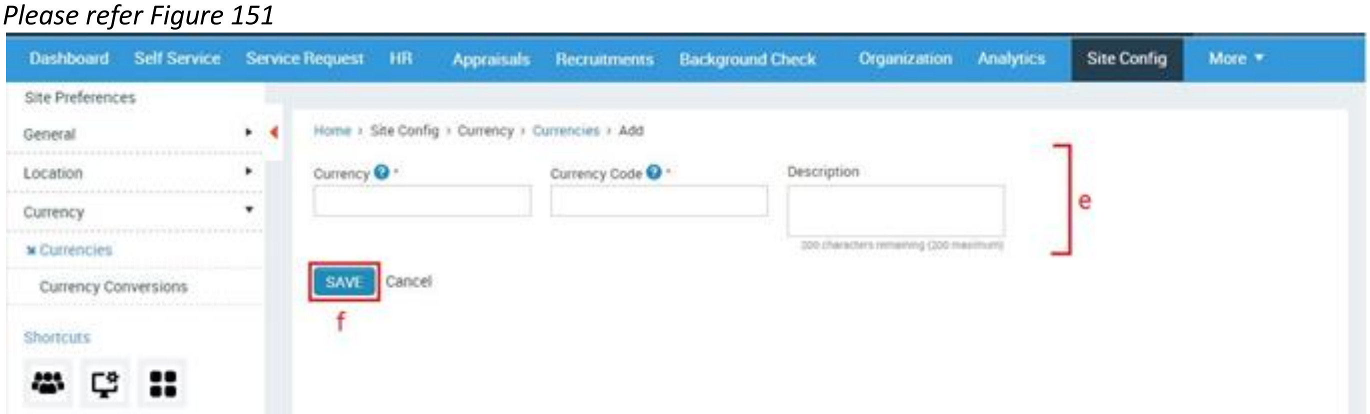


Figure 151

e. Enter the required details
f. Click **SAVE** button

Currency Conversions

Please refer Figure 152

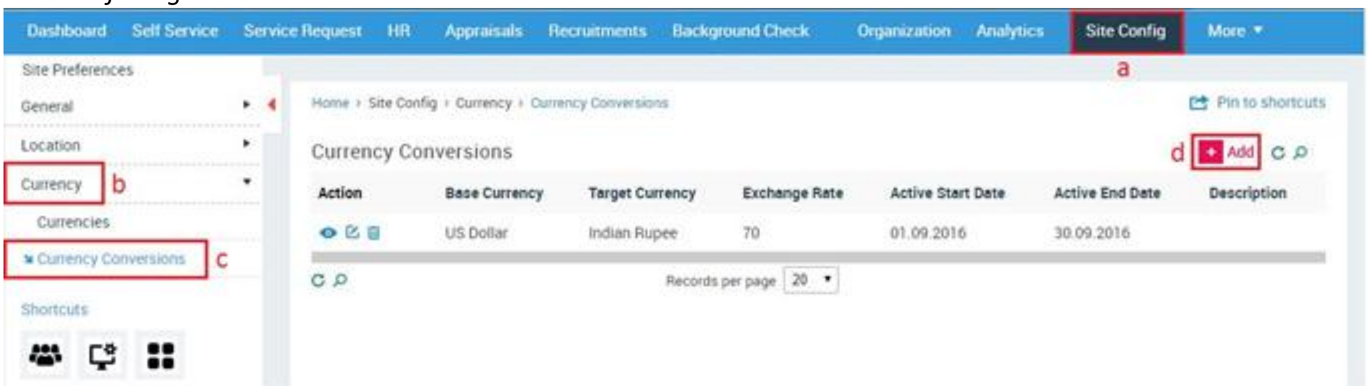


Figure 152

a. Click **Site Config** menu option
b. Click **Currency** on the left menu panel
c. Click **Currency Conversions** in the submenu
d. Click **+Add** button

Please refer Figure 153

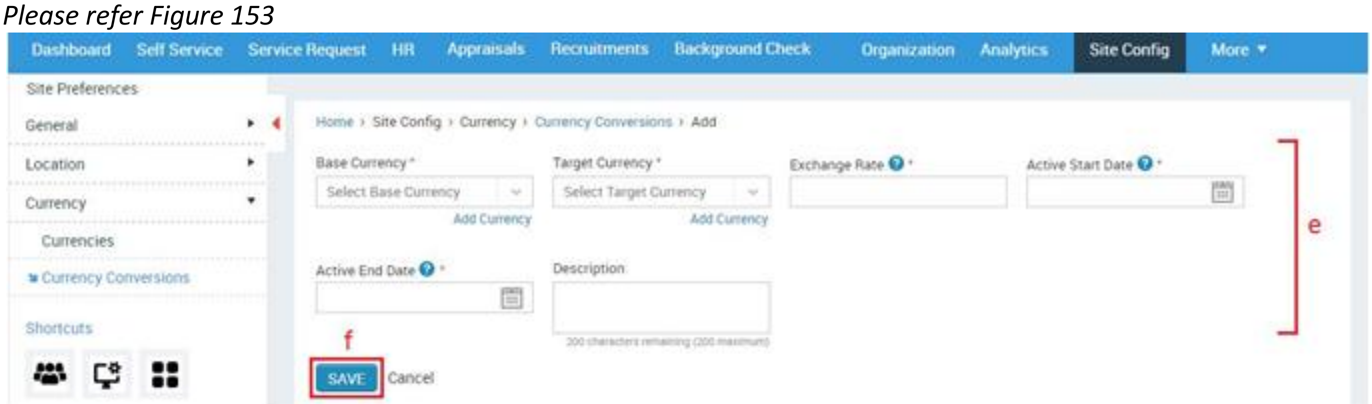


Figure 153

f. Enter the required details
g. Click **SAVE** button

12. Modules

Please refer section 1.3.1 Configuration Wizard: Step 1

13. Logs

Logs allow you to check the amount of activity happening on the application along with the daily users' login record.

13.1 How do I view Activity Logs?

Please refer Figure 154

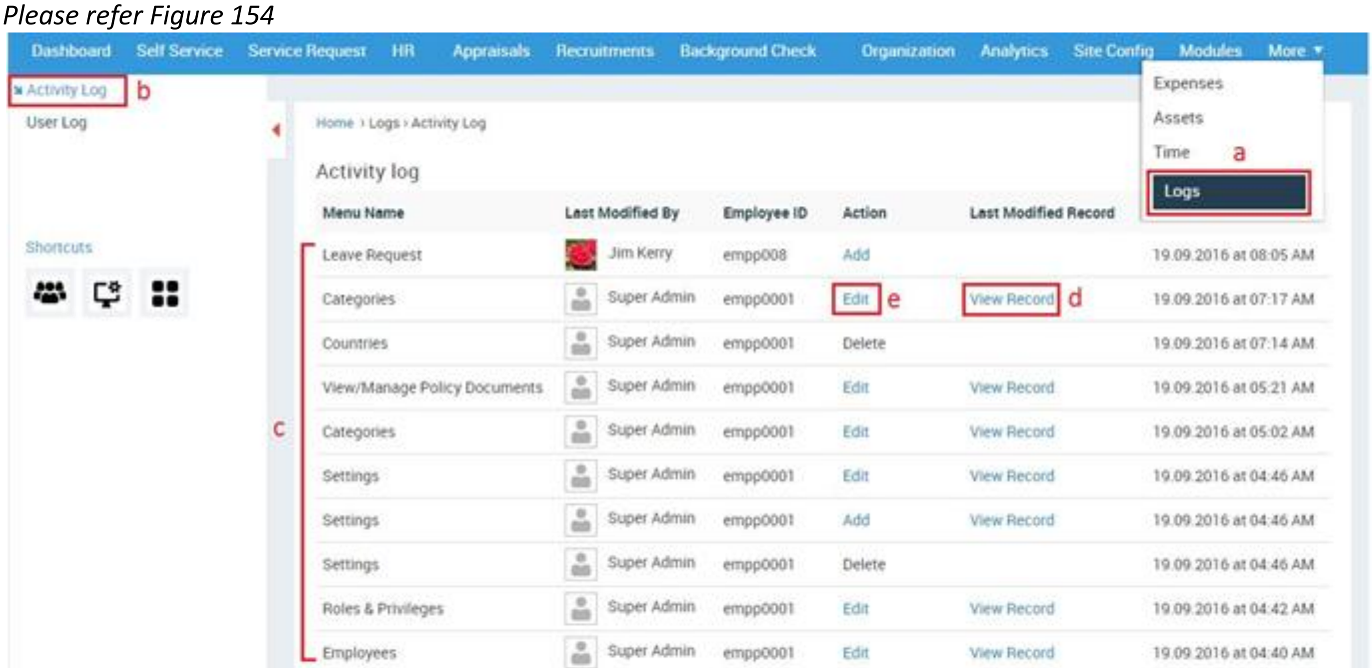
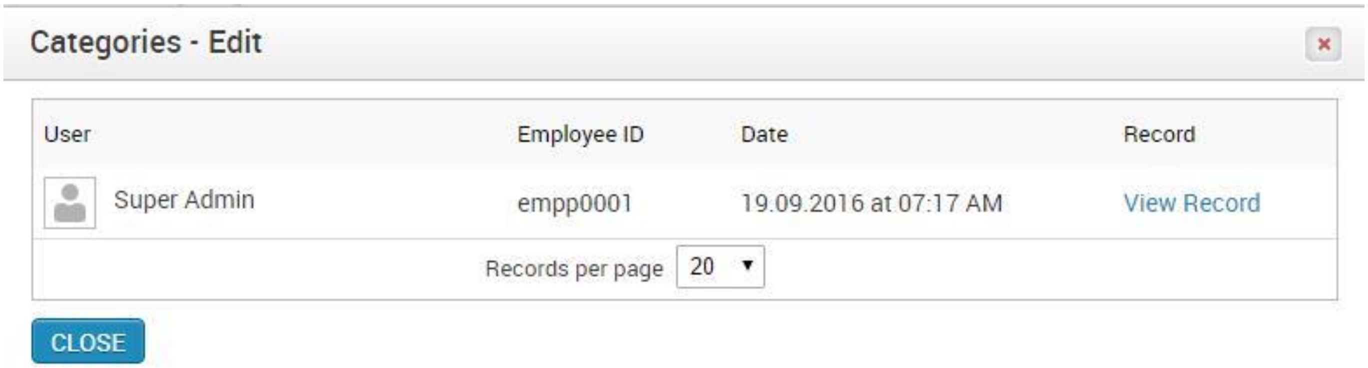


Figure 154

a. Click **Logs** in the top menu
b. Click **Activity Log** in the left menu panel
c. You can view the activity logs here
d. Click on **View Record** to view the modified record.
e. Click on the action (Add/Edit/Cancel) option to view the employees who performed those actions in that menu.

On clicking **action (Edit/Add)** option, a small window will open:



Clicking **View Record** will take you to the record's page.

13.2 How do I view User Logs?

Please refer Figure 155

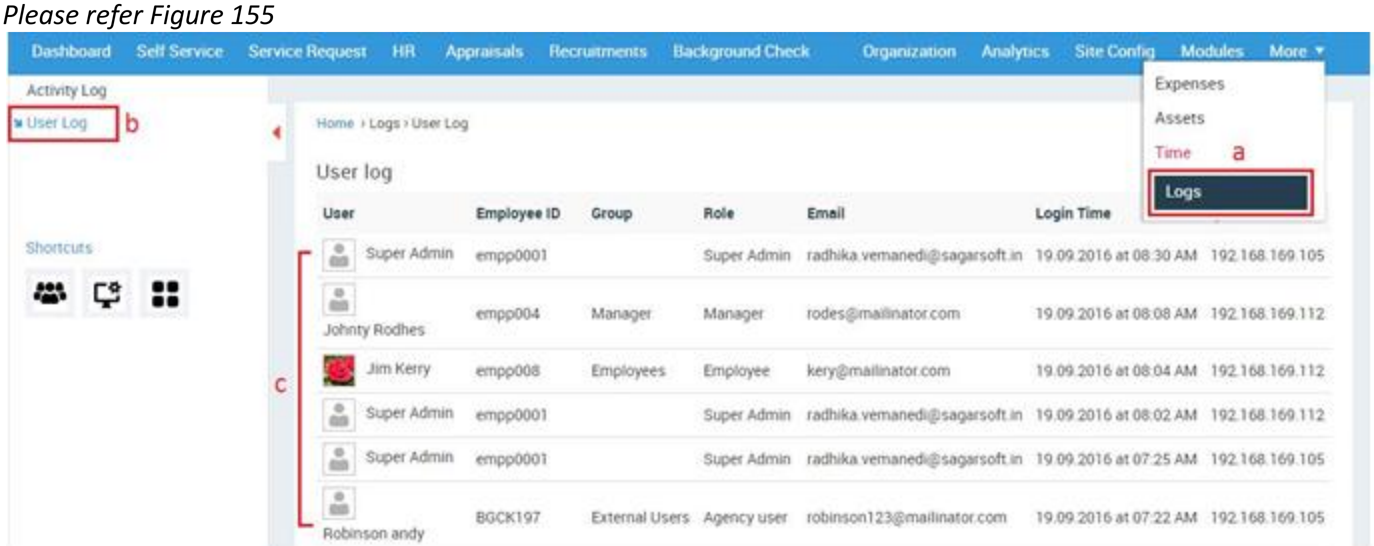
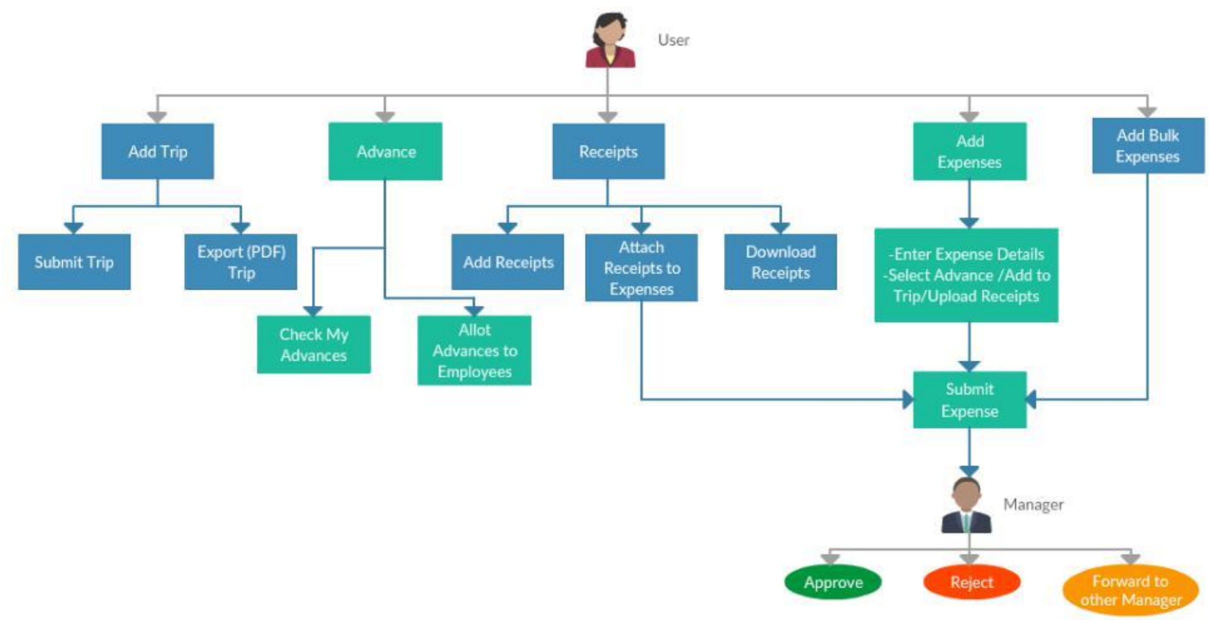


Figure 155

a. Click on Logs in the top menu
b. Click on User log in the left panel
c. You can view the user logs here

14. Expenses

Expenses allows you to manage your expenses, trip budgets, advances and receipts. You can create and send your expenses for approval to your Reporting Manager. Expenses can be placed into various categories such as food, travel, entertainment etc.



Process Description:

- User (Any user with a reporting manager) can add a new Trip ○ User can submit the Trip for approval
    - User can export the trip as an expense
- Advances
    - User can check the advances allotted to him/her
    - User can allot advances to employees reporting to him/her
- Receipts
    - User can add/upload receipts
    - User can attach receipts to expenses
    - User can download existing receipts
- User can add expenses
    - User will need to enter expense details
    - User can select an advance amount/add the expense to a trip/upload receipts (optional) ○ User can then submit his/her expense
    - The user's reporting manager receives the user's expense request, he/she can:
        - Approve the expense
        - Reject the expense
        - Forward the expense to another manager who can perform the actions on his/her behalf. (The other manager also has the same options i.e Approve/Reject/Forward)

Note: There is no limit on how many times an expense can be forwarded.

14.1 How do I add an Expense Category?

Please refer Figure 156

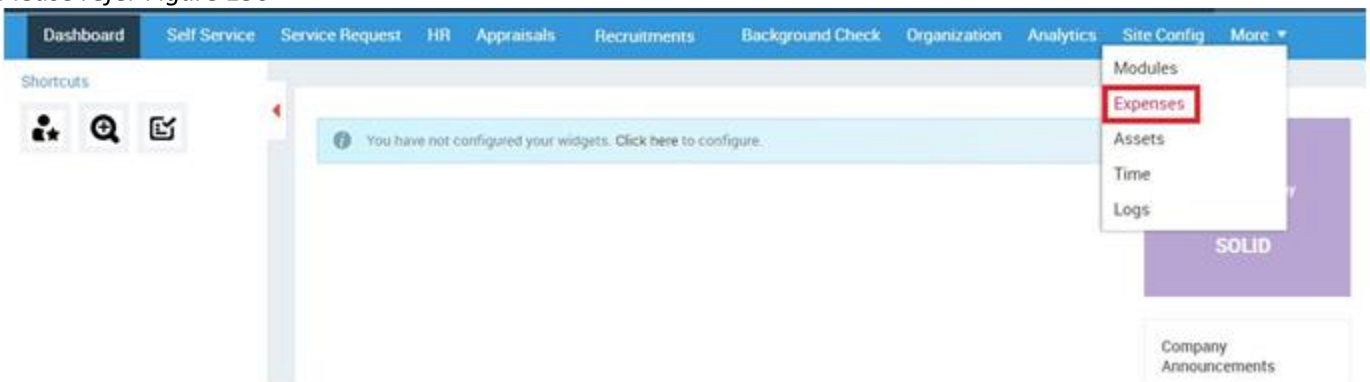


Figure 156

a. Click **Expenses** in the top menu

Please refer Figure 157

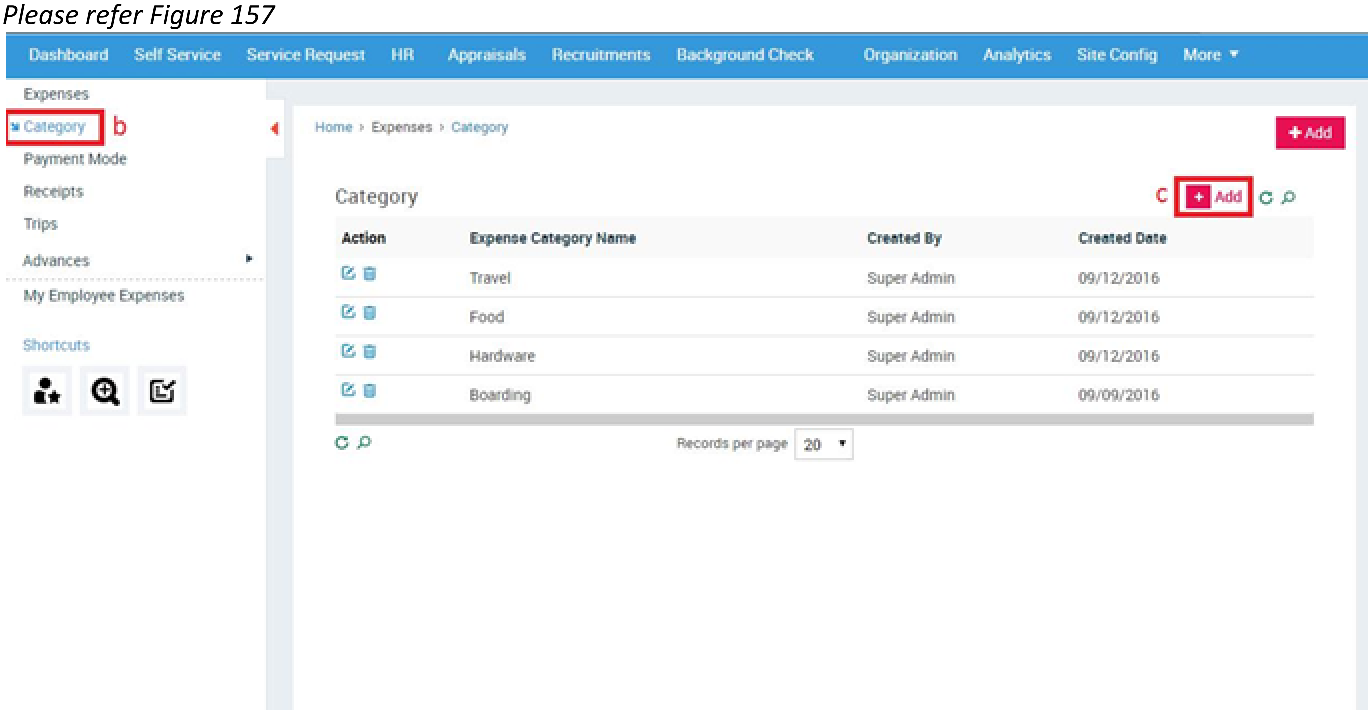


Figure 157

b. Click **Category** on the left menu panel

c. Click **+Add** button on the right side

Or

Please refer Figure 158

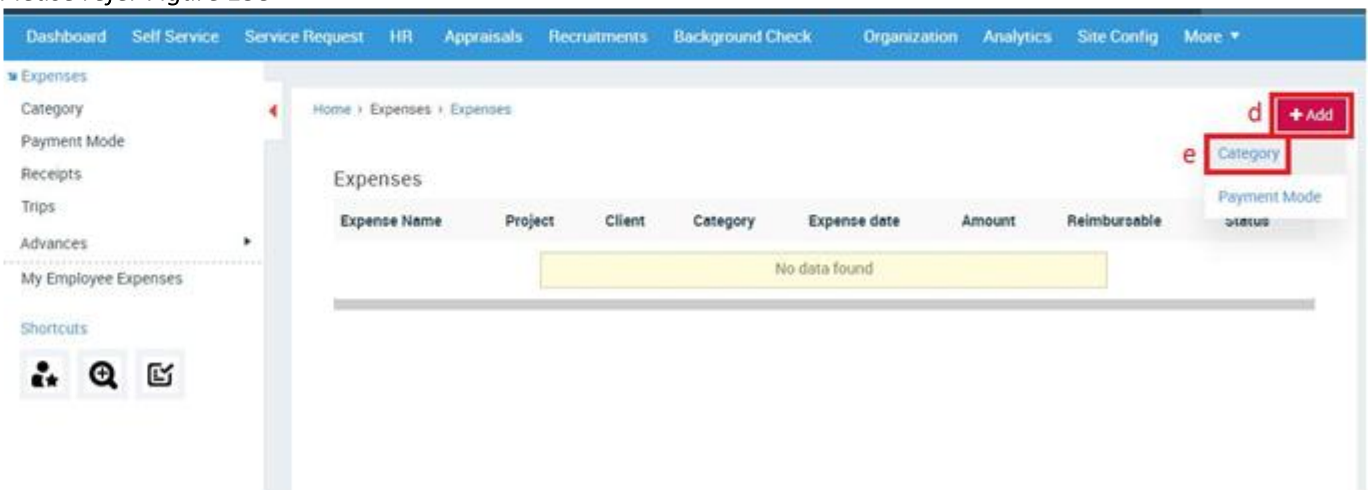


Figure 158

d. Click **+Add** on the top right corner
e. Select **Category**

Please refer Figure 159

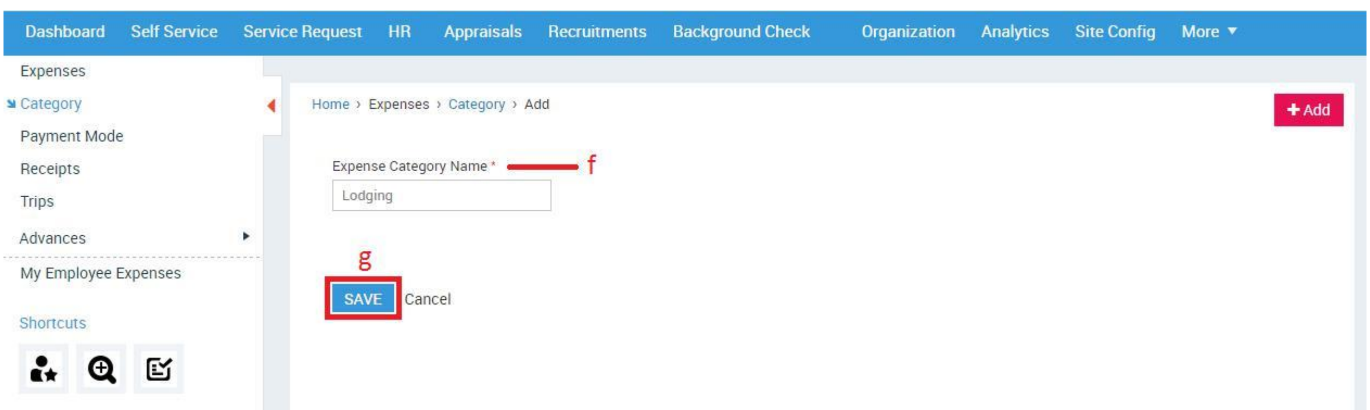


Figure 159

f. Enter Category name
g. Click **SAVE** button

14.2 How do I add a Payment Mode?

The method of payment for example: credit card, net banking, cash etc.

Please refer Figure 160

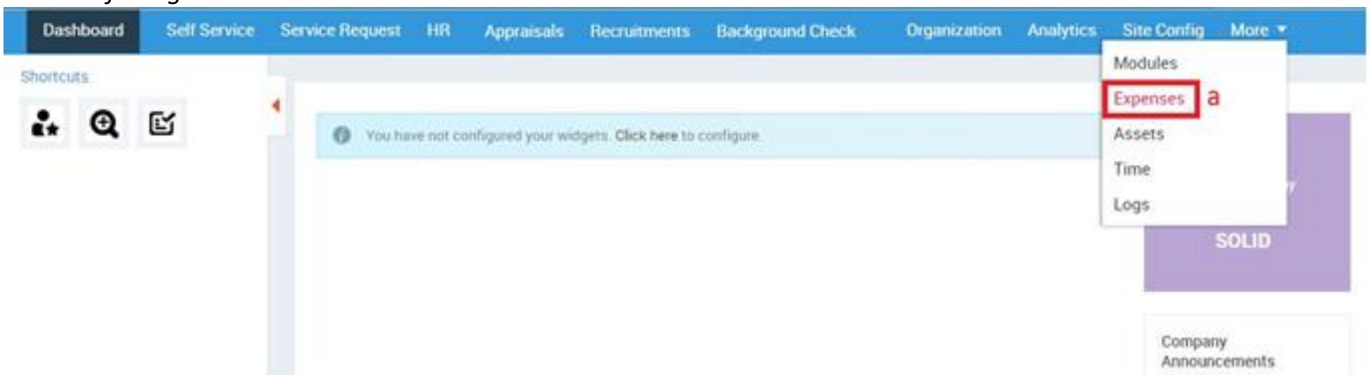


Figure 160

a. Click **Expenses** in the top menu

Please refer Figure 161

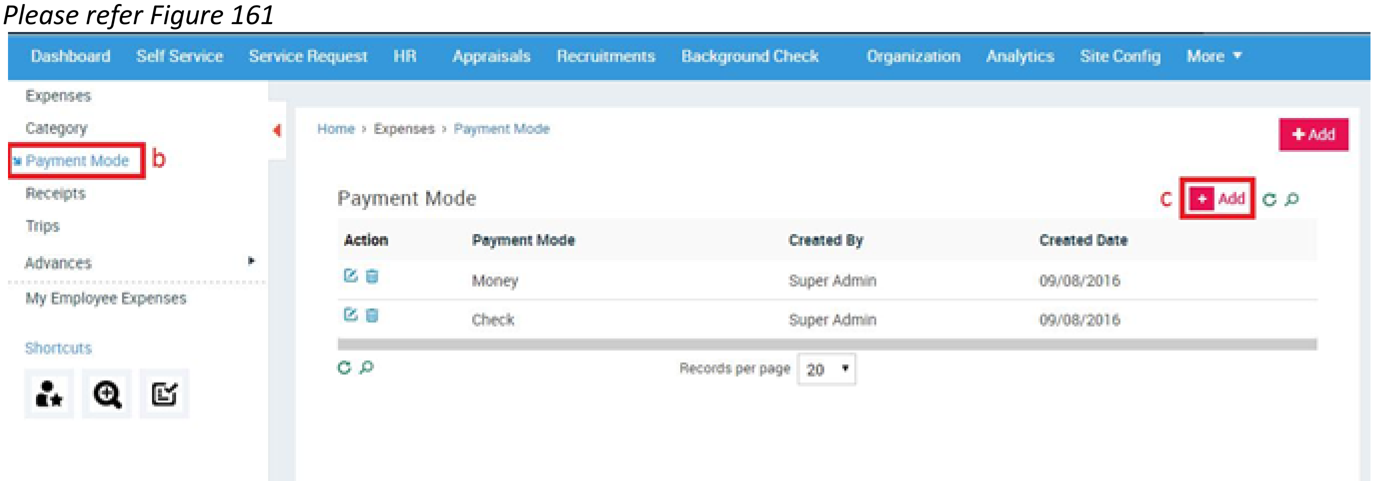


Figure 161

b. Click **Payment Mode** on the left menu panel
c. Click **+Add** button on the right side

Or

Please refer Figure 162

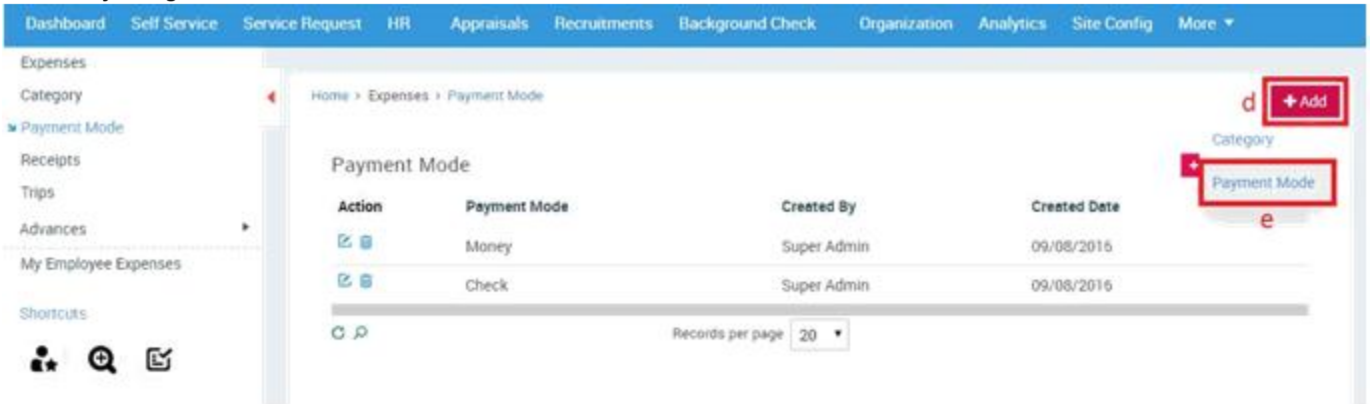


Figure 162

d. Click **+Add** on the top right corner

e. Select **Payment Mode**

Please refer Figure 163

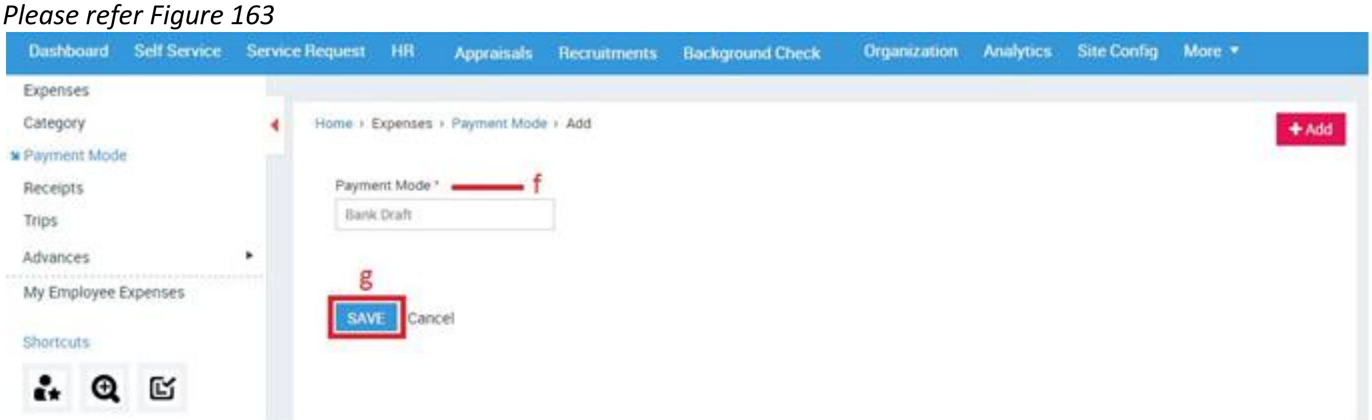


Figure 163

f. Enter Payment Mode name

g. Click **SAVE** button

14.3 How do I add an Expense?

Please refer Figure 164

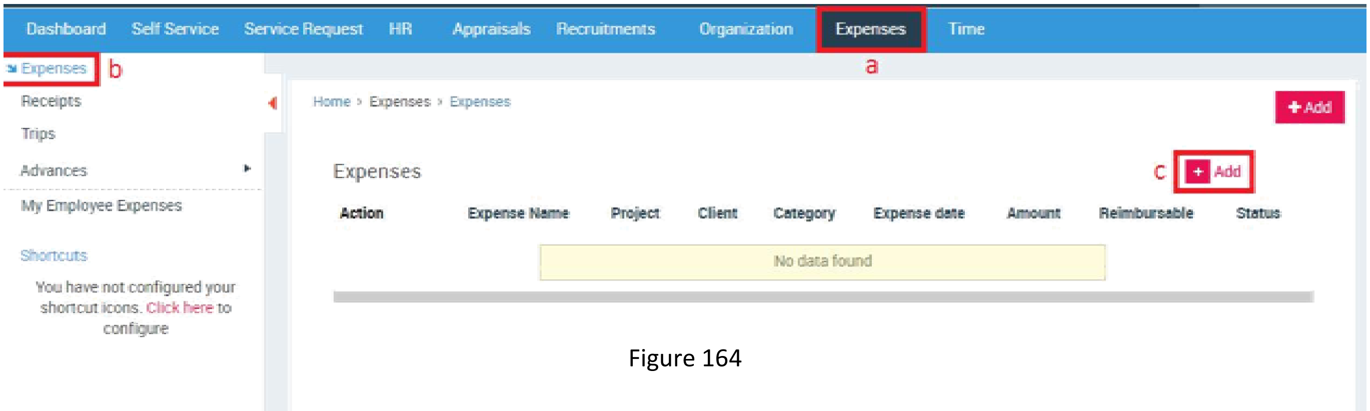


Figure 164

a. Click **Expenses** in the top menu
b. Click **Expenses** in the left menu panel
c. Click **+Add** button on the right side

Please refer Figure 165

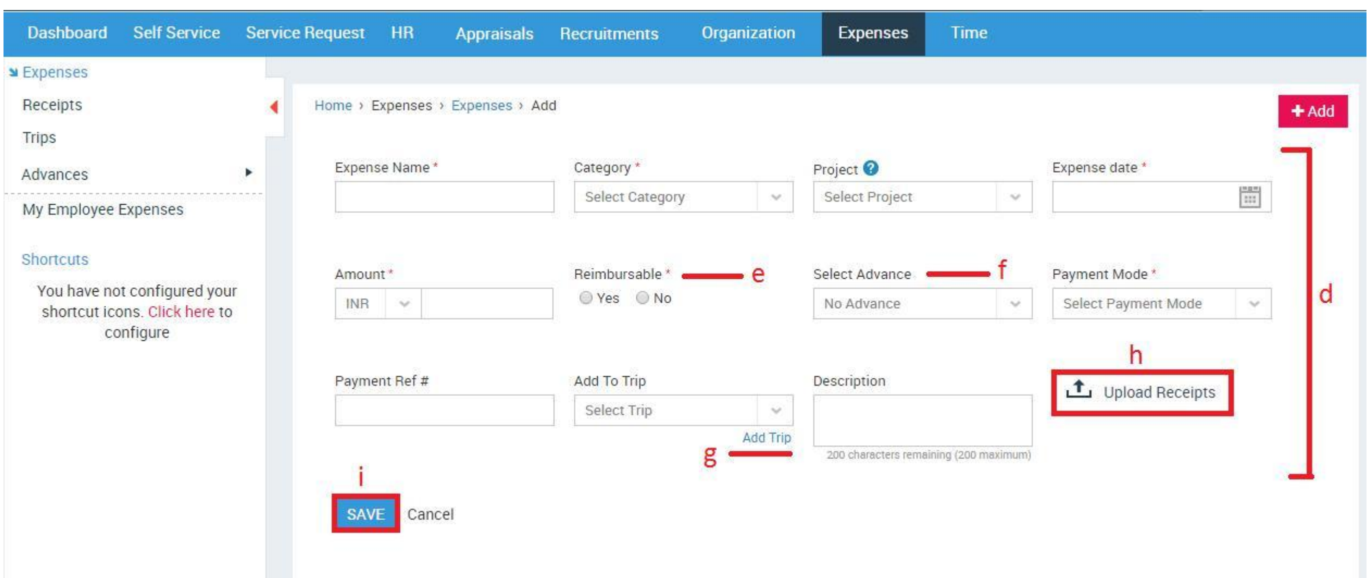


Figure 165

d. Enter the required details
e. Not functional in the current version
f. Employers can pre-allocate a certain amount of money called **Advance** to an employee, which can be used for expenses incurred during trip(s) or for project(s) and client(s).
g. Add Trips for managing multiple expenses, clients and projects. A Trip comprises of the various costs incurred in a trip like travel, food, and accommodation
h. Upload Receipts to support your expenses

i. Click **SAVE** button

14.4 How do I submit an Expense for approval?

You will need to create an Expense, before you can submit it.

Please refer Figure 166

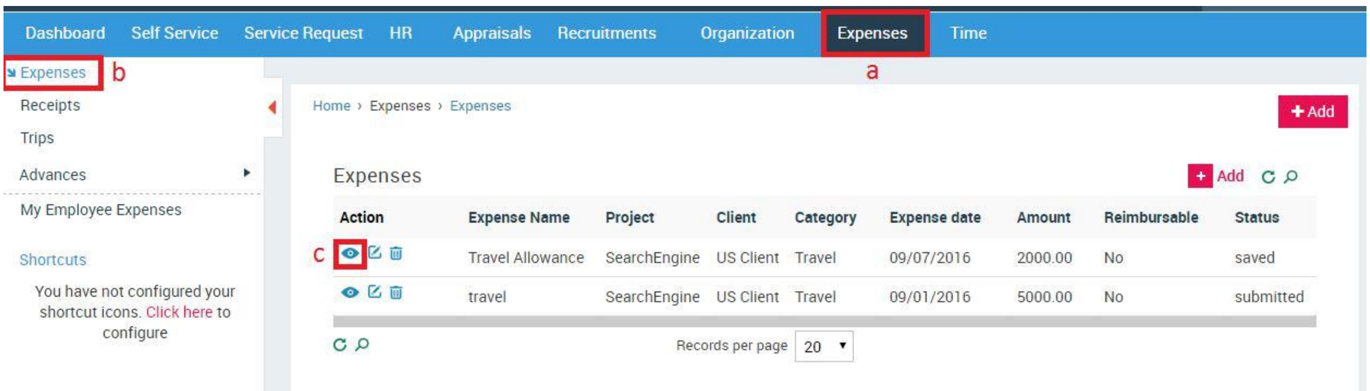


Figure 166

a. Click **Expenses** in the top menu
b. Click **Expenses** in the left panel
c. Click **View** button in the action column

Please refer Figure 167

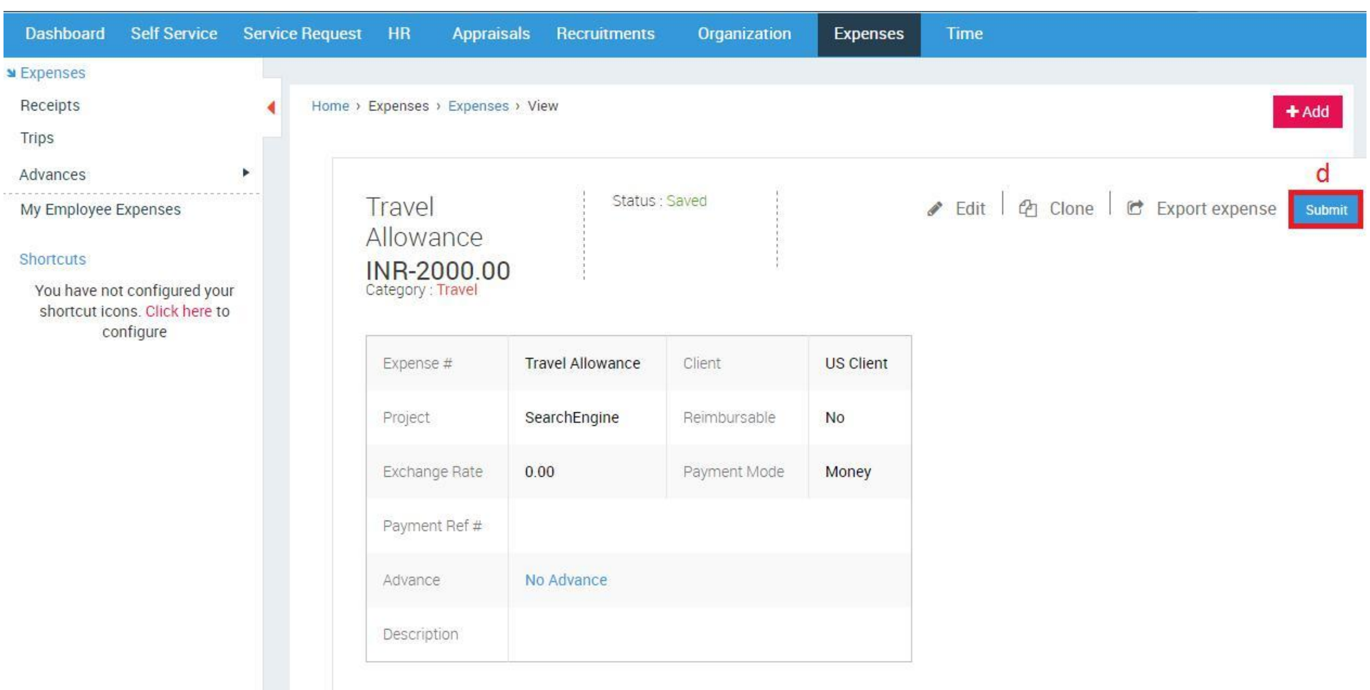


Figure 167

d. Click **Submit** button

A confirmation message will be displayed.

Please refer Figure 168

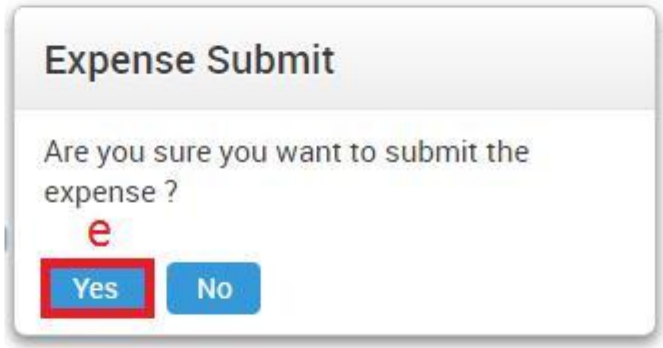


Figure 168

e. Click **Yes**

14.5 How do I export an Expense?

You will need to create an Expense, before you can export it.

Please refer Figure 169

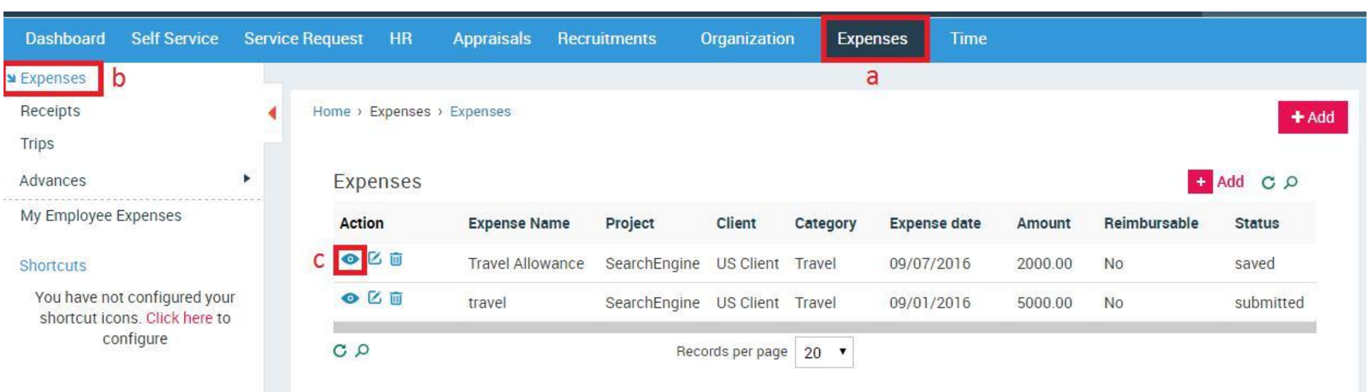


Figure 169

a. Click **Expenses** in the top menu
b. Click **Expenses** in the left panel
c. Click **View** button in the action column

Please refer Figure 170

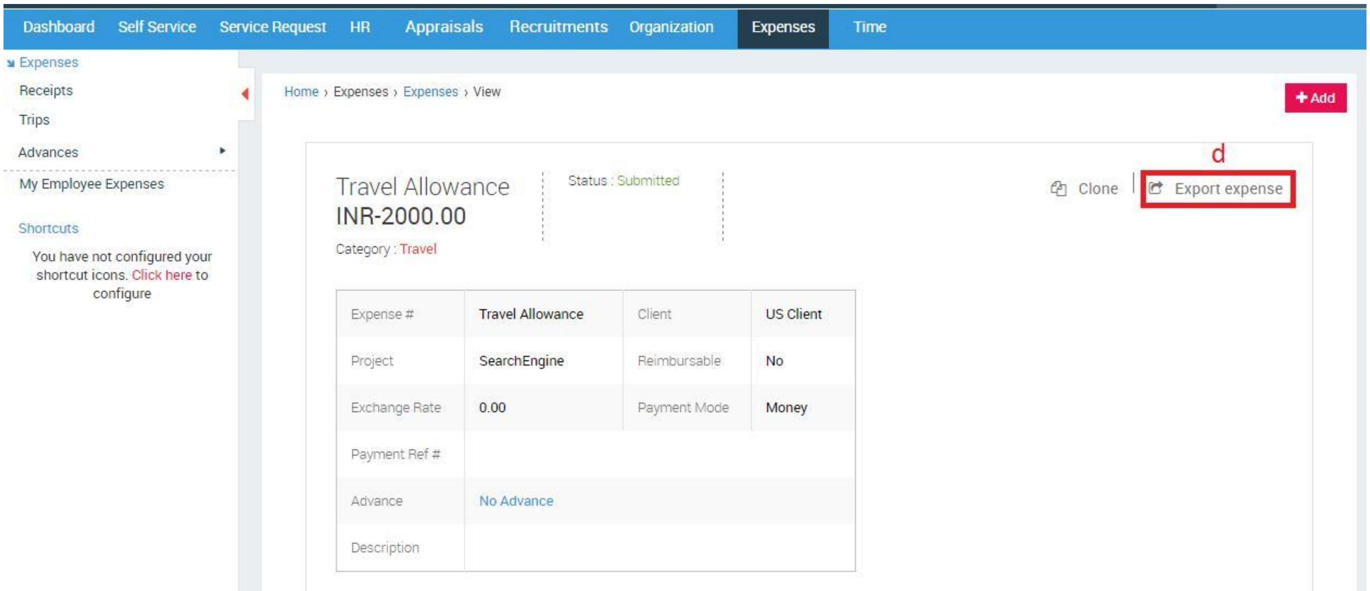


Figure 170

d. Click Export expense button

An expense report in PDF format will be downloaded.

14.6 How do I clone an Expense?

You can clone an expense if a new expense has similar details to the one you want to clone. It will save you the trouble from creating a new expense from scratch.

You will need to create an Expense, before you can clone it.

Please refer Figure 171

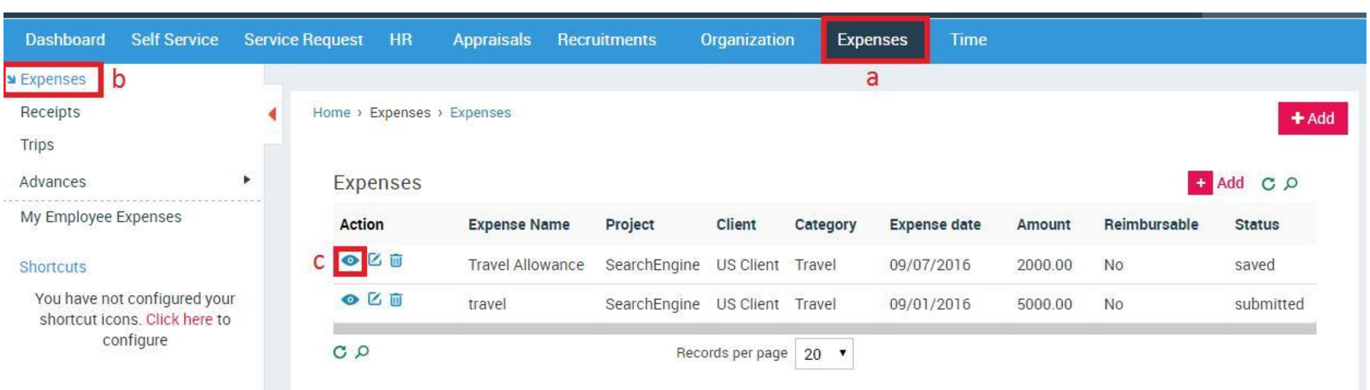


Figure 171

a. Click **Expenses** in the top menu
b. Click **Expenses** on the left menu panel

c. Click **View** button in the action column

Please refer Figure 172

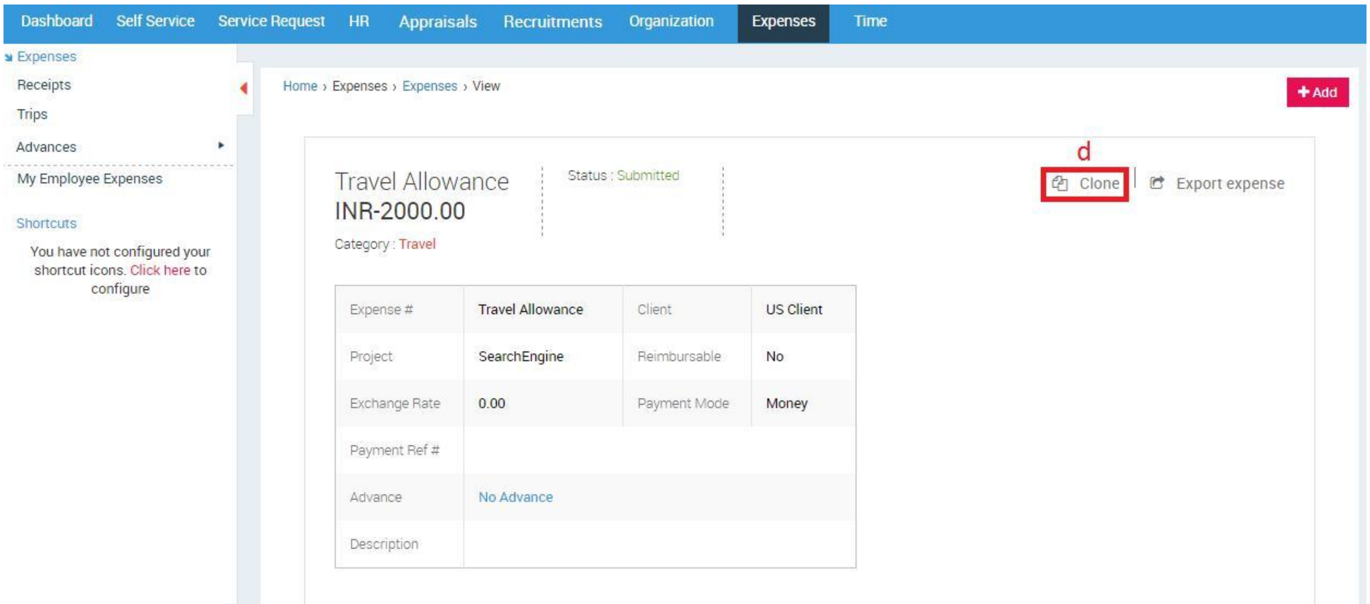


Figure 172

d. Click **Clone** option

You will be redirected to the Add Expense screen. The details will be auto filled by default, you can edit the details.

Please refer Figure 173

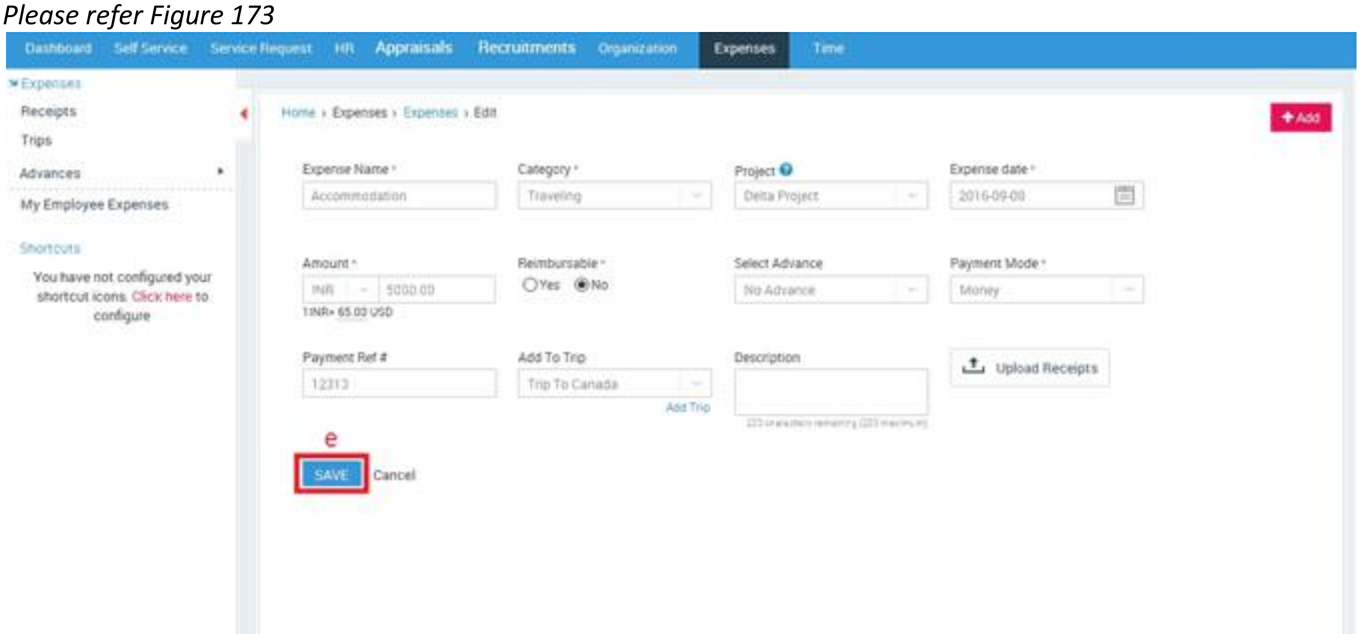


Figure 173

e. Click **SAVE** button

14.7 How do I approve/reject Employee Expenses?

Please refer Figure 174

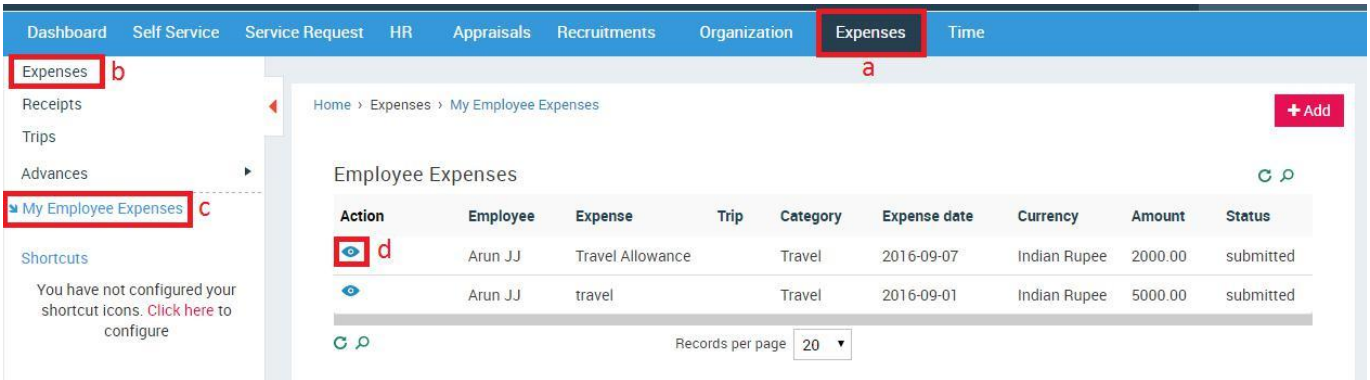


Figure 174

a. Click **Expenses** in the top menu
b. Click **Expenses** in the left menu panel
c. Click **My Employee Expenses** in the submenu
d. Click **View** icon in the action column

Please refer Figure 175

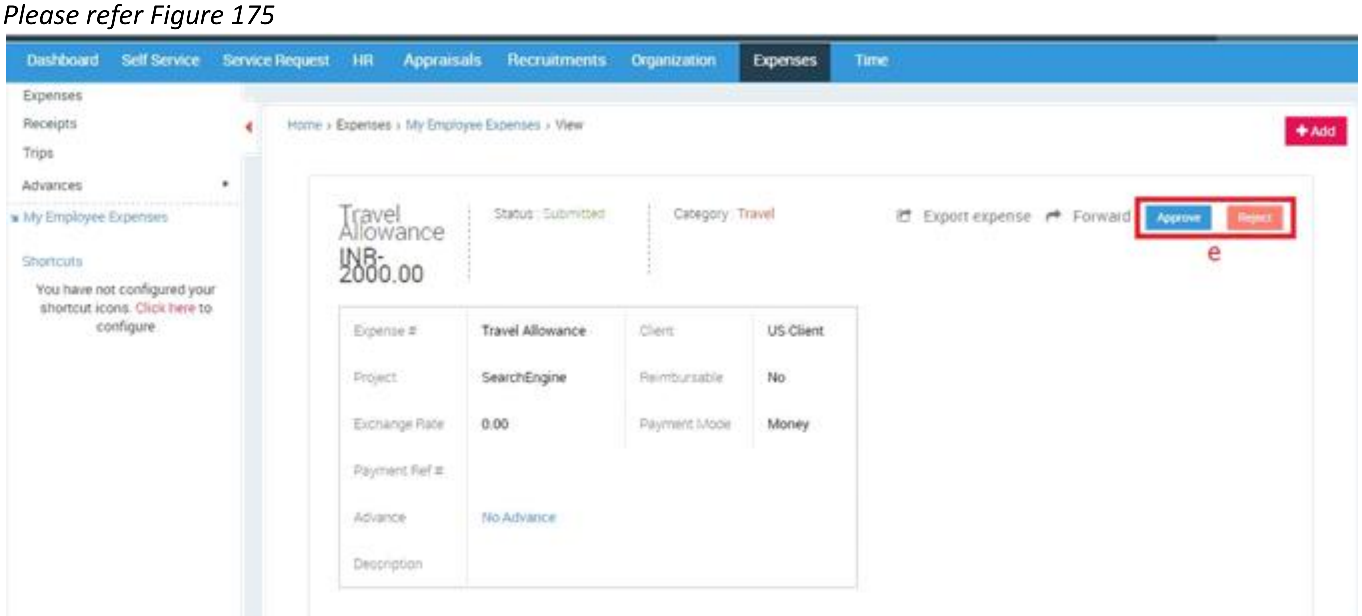


Figure 175

e. Click **Approve/Reject**

A confirmation message will be displayed.

Please refer Figure 176

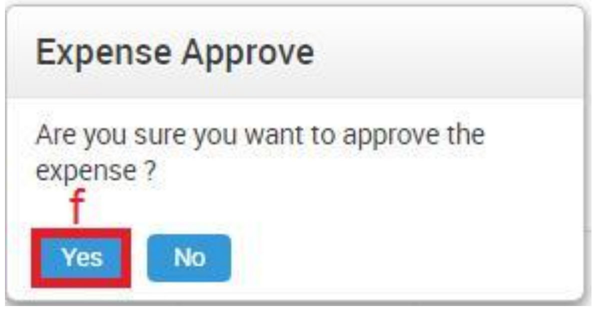


Figure 176

f. Click **Yes** Button

14.8 How do I forward an Expense to another Manager?

Please refer Figure 177

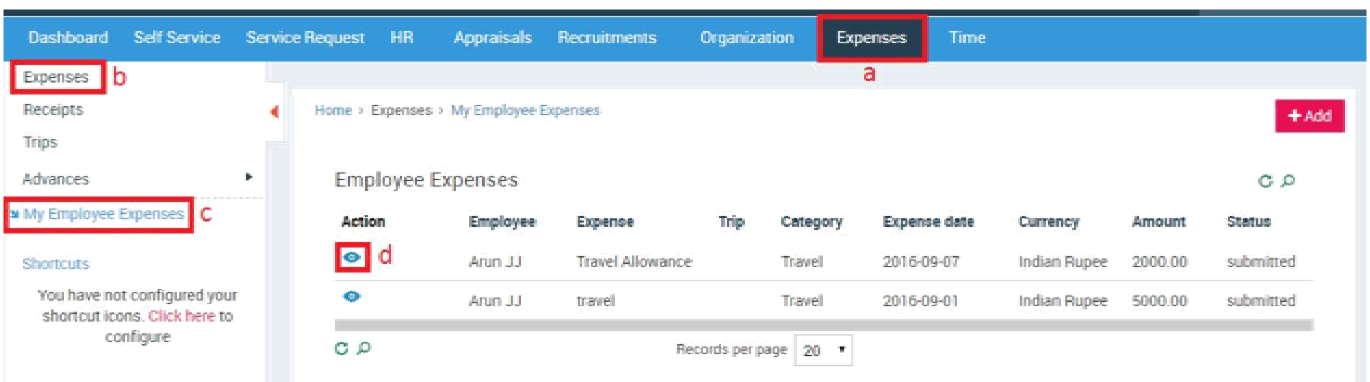


Figure 177

a. Click **Expenses** in the top menu
b. Click **Expenses** on the left menu panel
c. Click **My Employee Expenses** in the submenu
d. Click **View** button in the action column

Please refer Figure 178

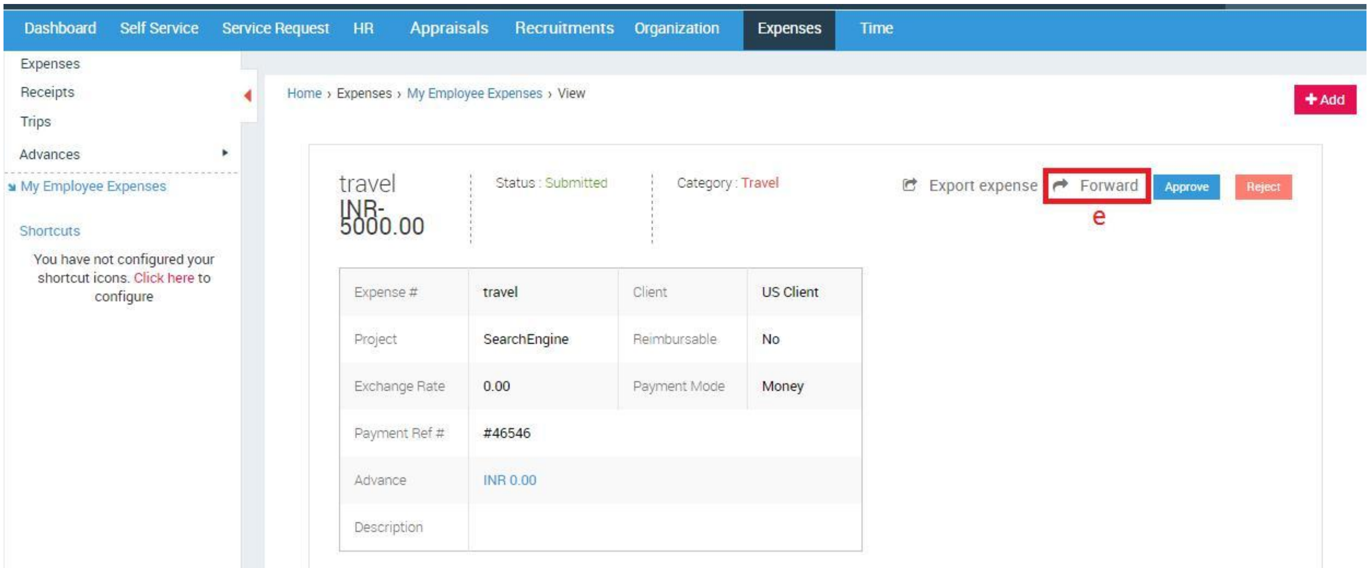


Figure 178

e. Click **Forward** option

A small pop up window will open

Please refer Figure 178

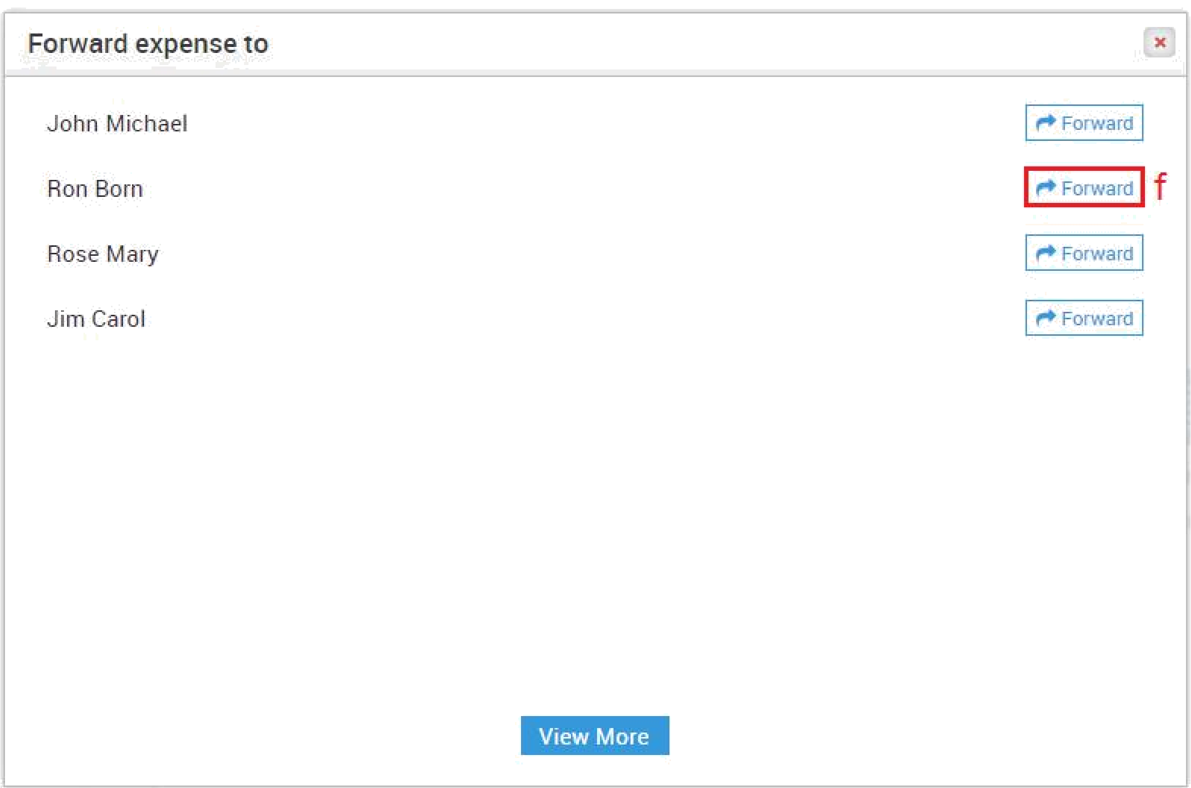


Figure 178

f. Click **Forward** button against the Manager's name to whom you want to forward the expense to

The other manager will receive an email notification informing him about the forwarded expense. He/she can Approve/Reject/Forward the expense.

14.9 How do I upload Receipts?

Please refer Figure 179

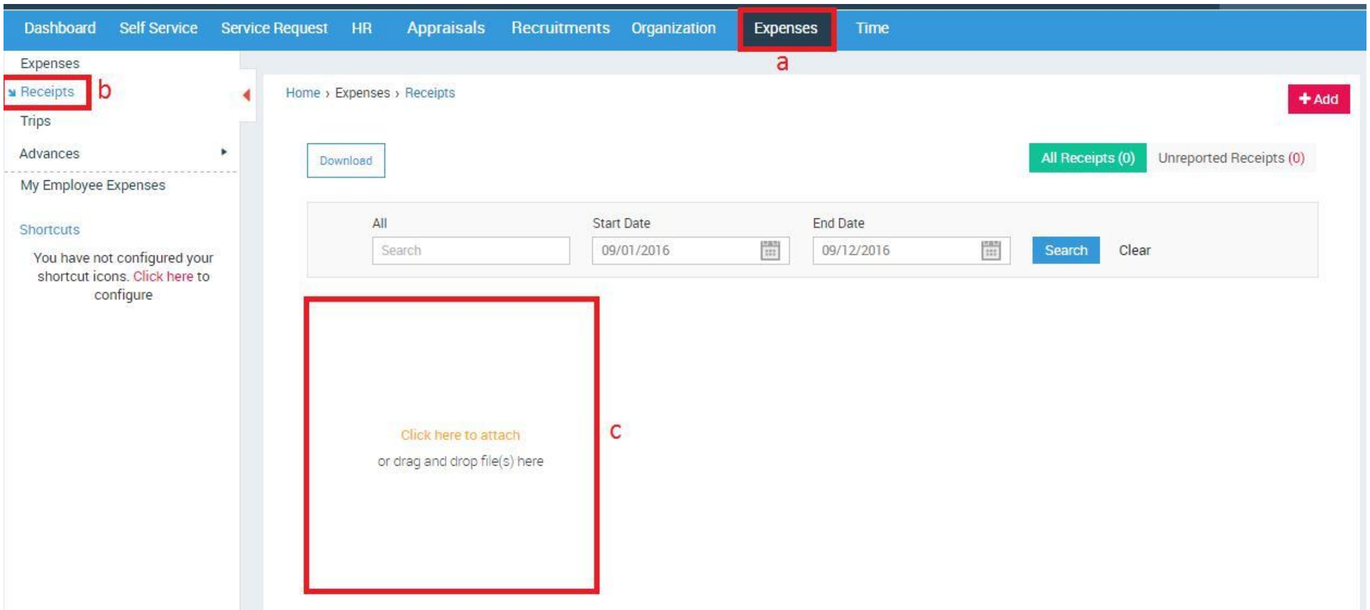


Figure 179

a. Click **Expenses** in the top menu
b. Click **Receipts** on the left menu panel
c. Click here to upload receipts **Or** Drag and drop files here

14.10 How do I download my Receipts?

Please refer Figure 180

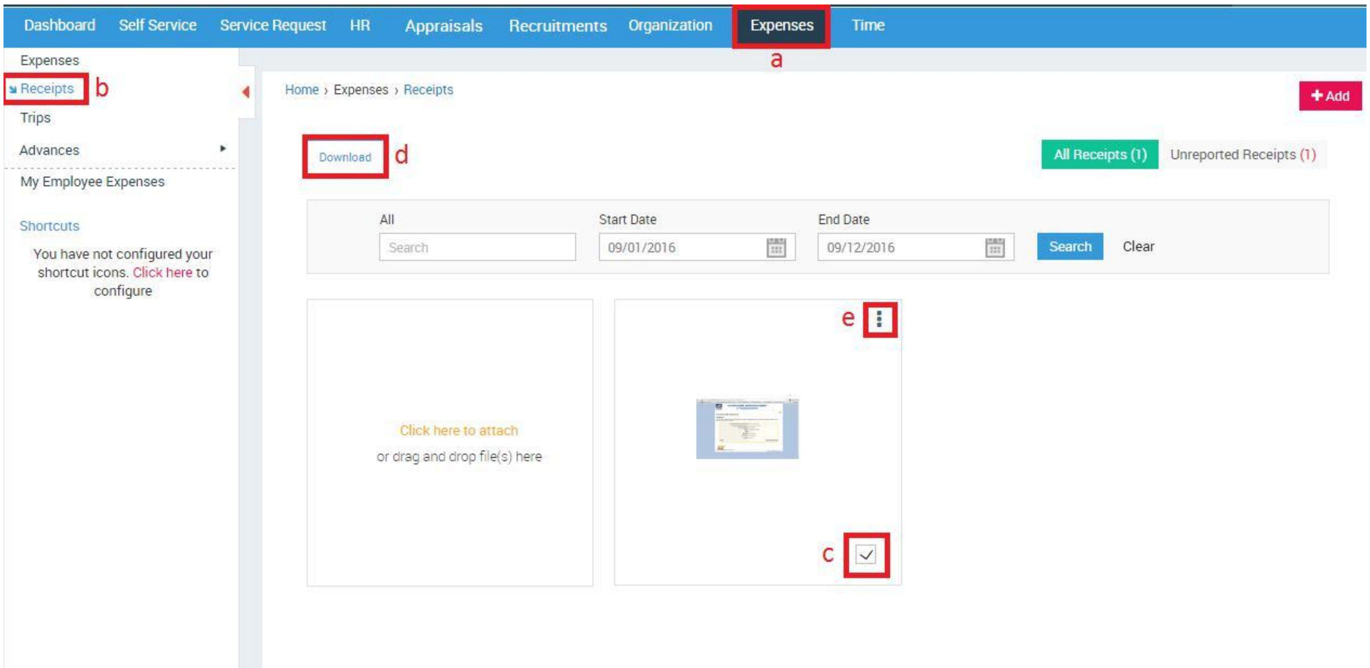


Figure 180

a. Click **Expenses** in the top menu
b. Click **Receipts** on the left menu panel
c. Select the receipt you want to download
d. Click **Download** button

Or

e. Click **More Action** icon

Please refer Figure 181

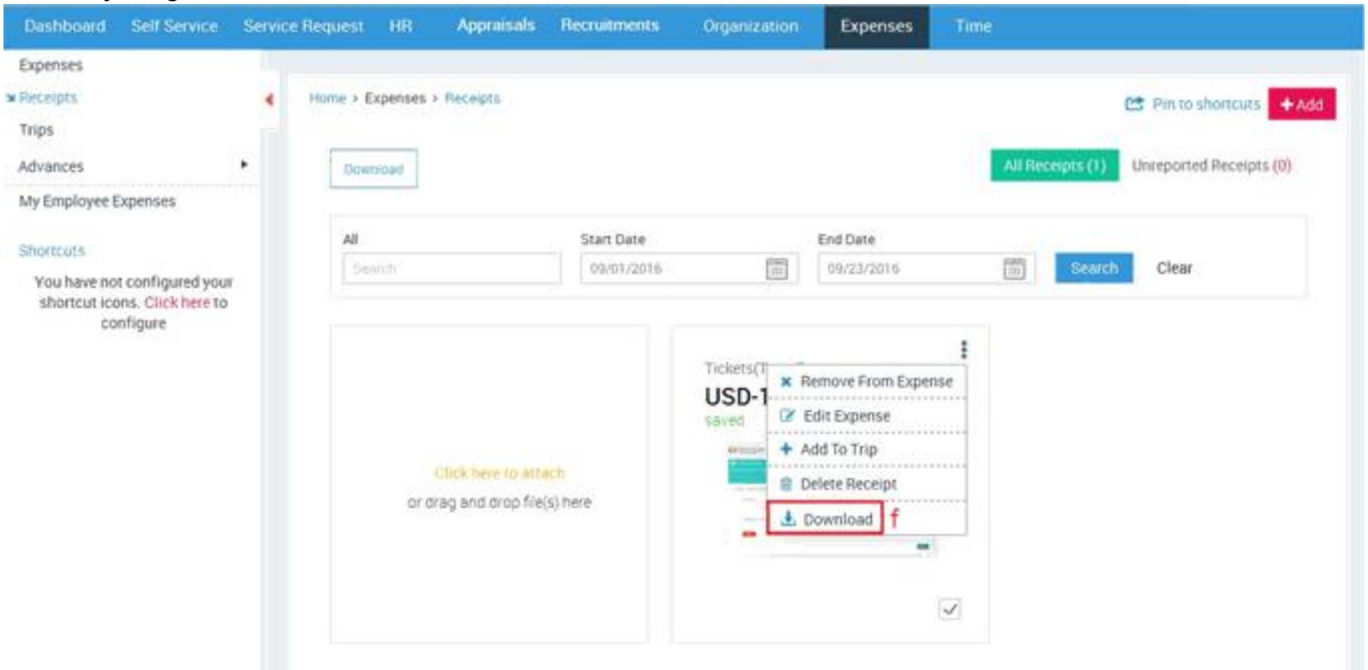


Figure 181

f. Select Download

14.11 What are Unreported Receipts?

Receipts which haven't been attached with any Expense or Trip are placed in the Unreported Receipts category.

Please refer Figure 182

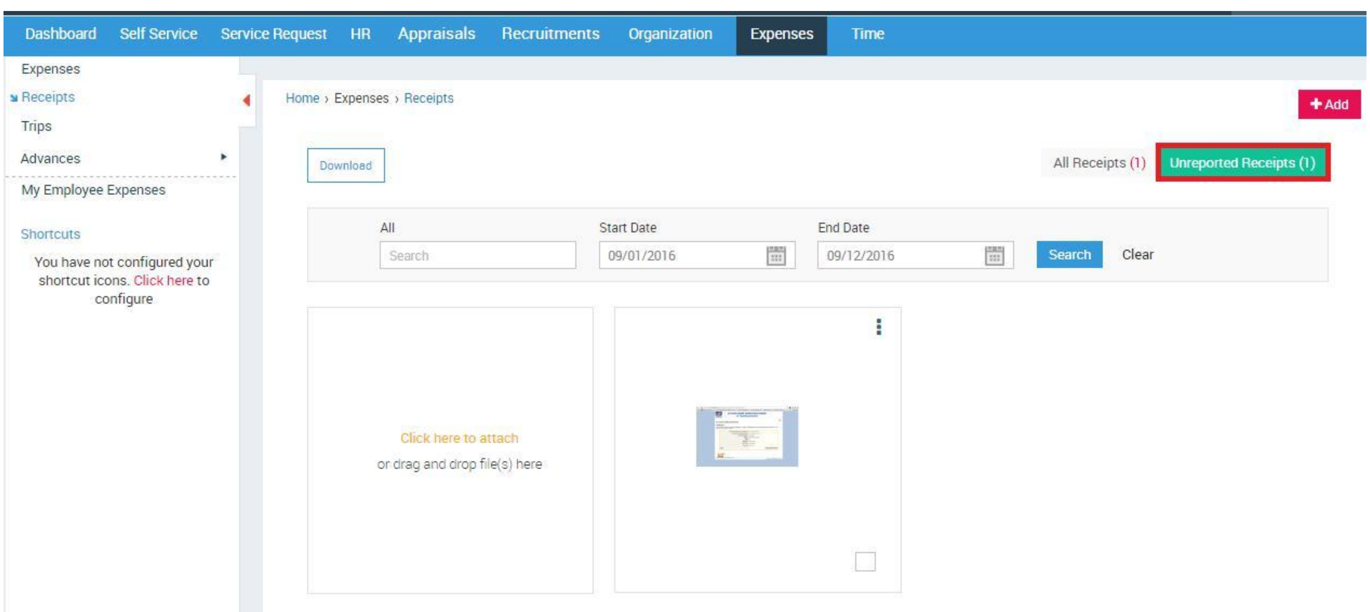


Figure 182

14.12 How do I add Receipts to Expenses/Trips?

To upload receipts while adding expenses, please refer 14.3 How do I add an Expense?

Please refer Figure 183

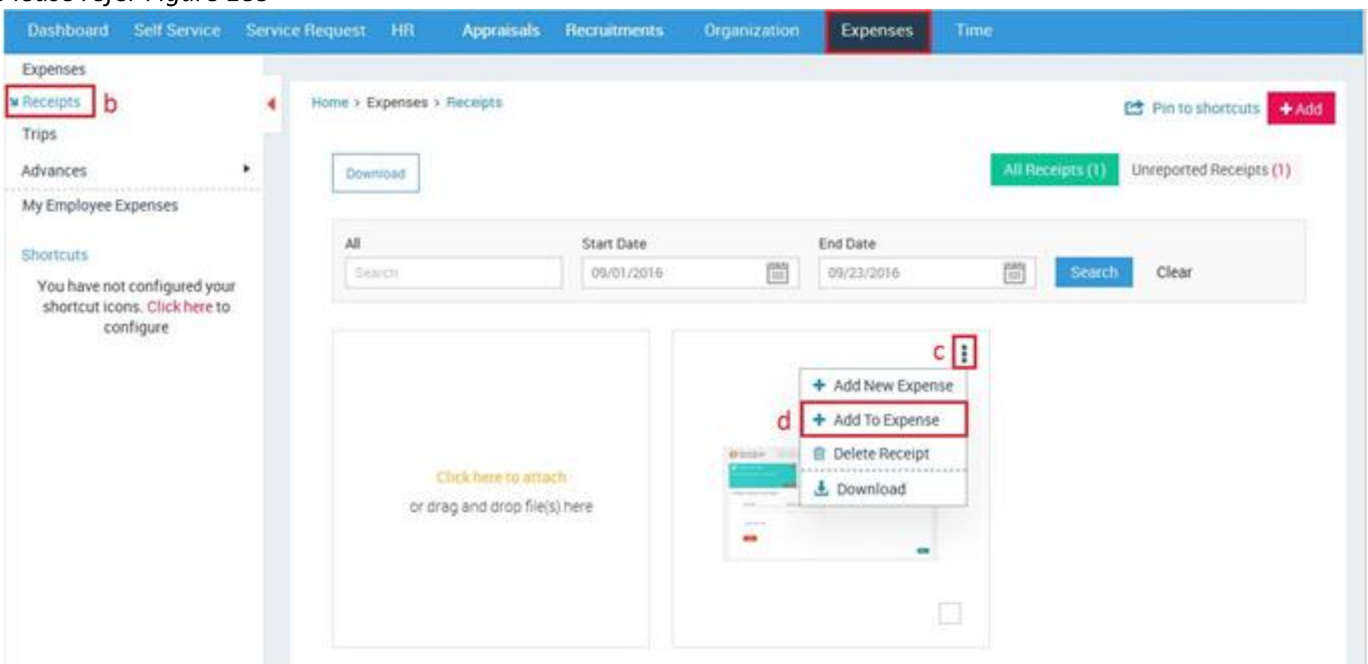


Figure 183

a. Click **Expenses** in the top menu
b. Click **Receipts** on the left menu panel
c. Click **More Actions** icon
d. Click **Add to Expense**

A small pop up window will open.

Please refer Figure 184

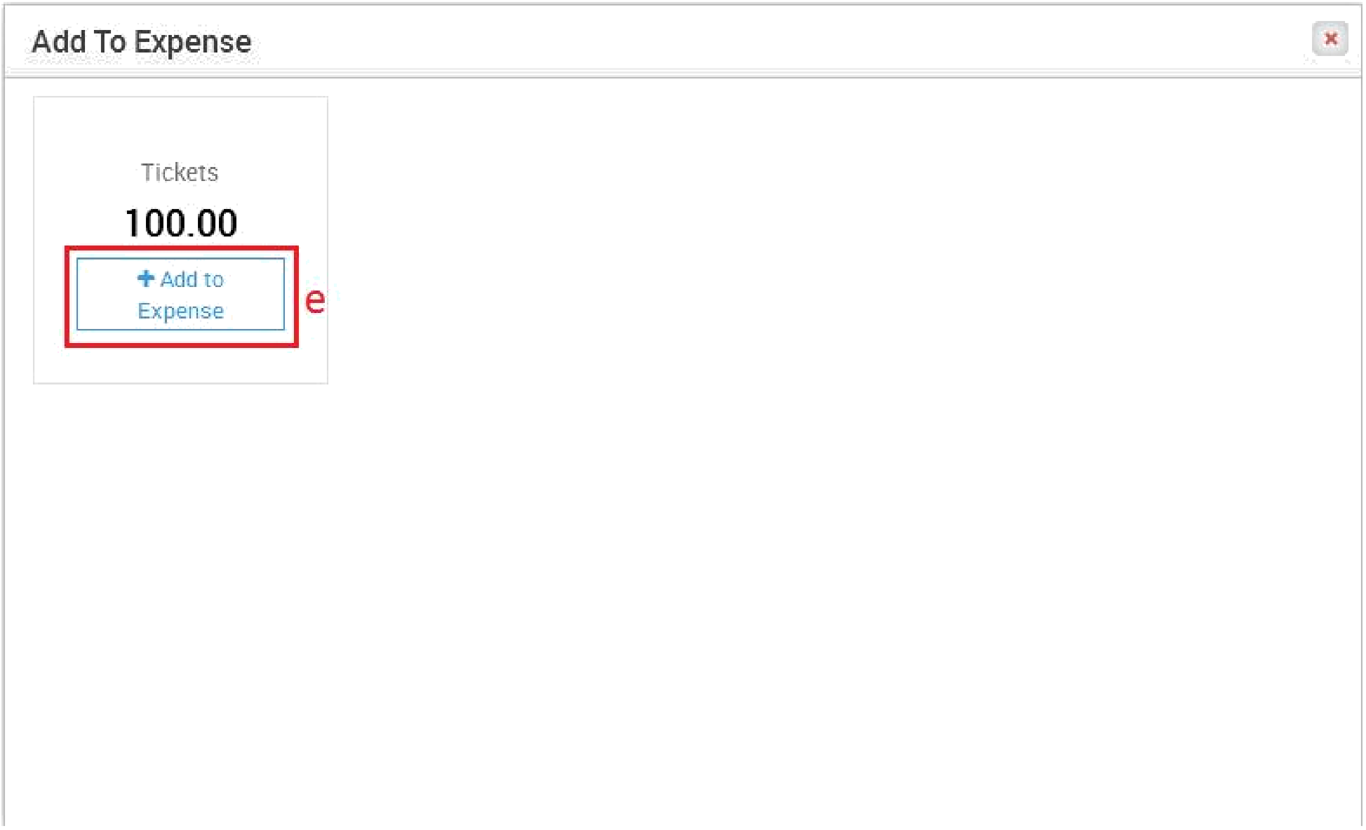
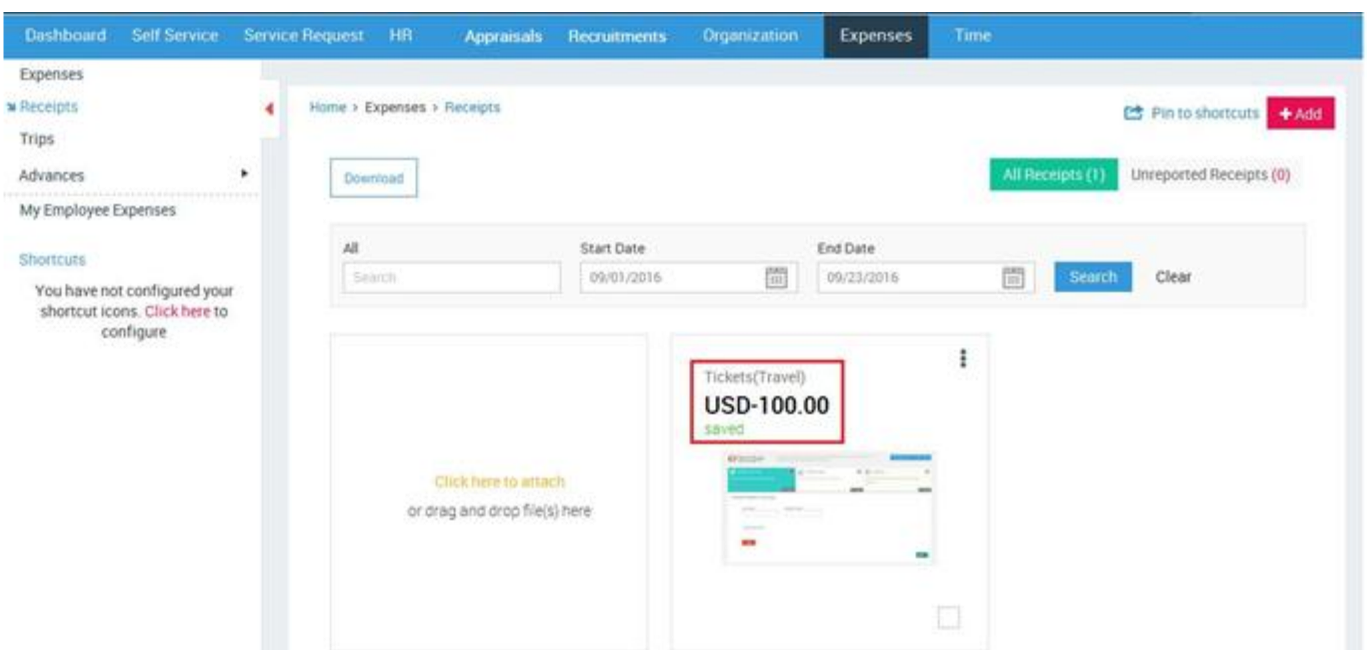


Figure 184

e. Click Add to Expense.

The below image shows the receipt has been added to an expense:



If you need to add a new expense after adding a receipt, then you can add expenses from Expenses > Receipts > Click on More Actions Button > Add New Expense.

14.13 How do I delete a Receipt?

Please refer Figure 185

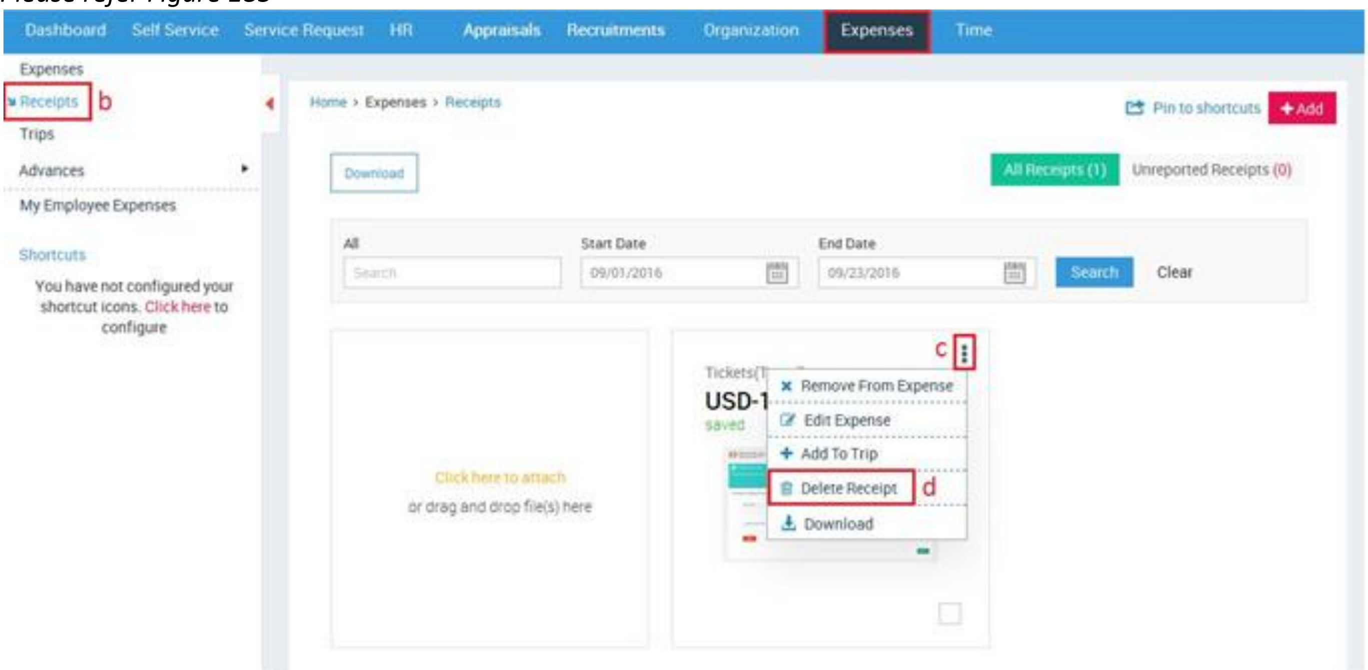


Figure 185

a. Click **Expenses** in the top menu
b. Click **Receipts** on the left menu panel
c. Click More Actions icon
d. Click Delete Receipt

A confirmation message will be displayed.

Please refer Figure 186

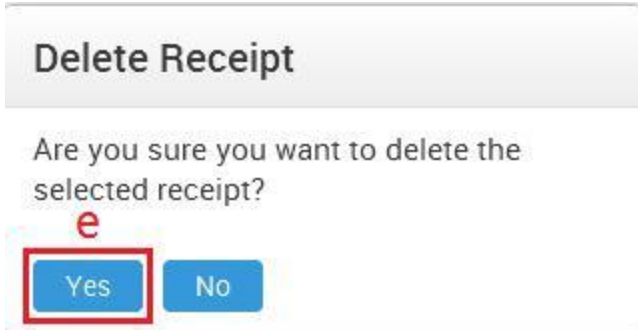


Figure 186

e. Click **YES** Button

14.14 How do I create a Trip?

Add Trips for managing multiple expenses, clients and projects. A Trip comprises of the various costs incurred in a trip like travel, food, and accommodation. This helps the managers to get an overview of the employee's entire trip expense at one go.

Please refer Figure 187

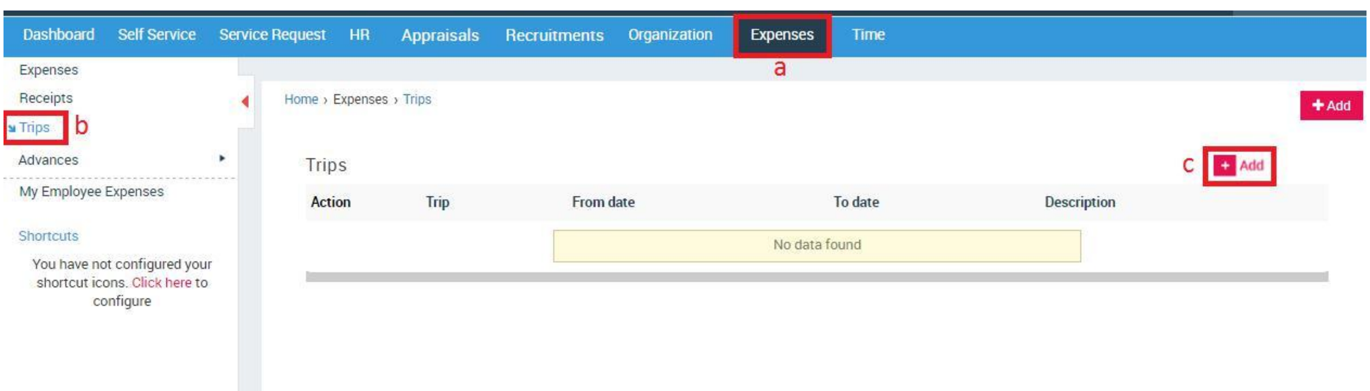


Figure 187

a. Click **Expenses** in the top menu
b. Click **Trips** on the left menu panel
c. Click **+Add** Button

Please refer Figure 188

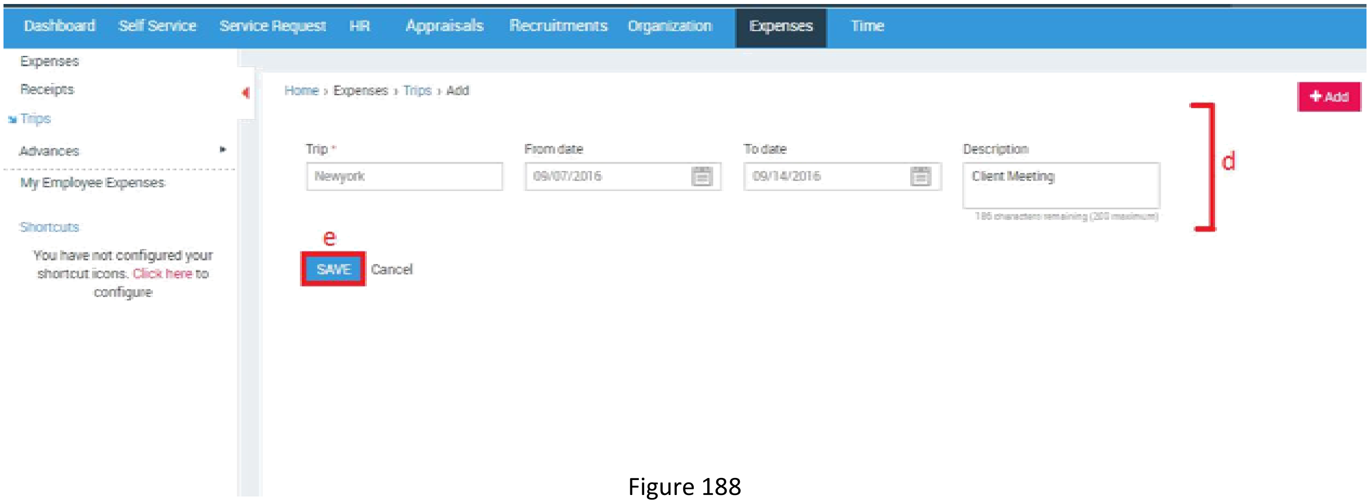


Figure 188

d. Enter the required details
e. Click **SAVE** button

14.15 How do I allot an Advance to an Employee?

HRMS allows Manager to pre-allocate a certain amount of money called **Advance** to an employee, which can be used for expenses incurred during trip(s) or for project(s) and client(s).

Please refer Figure 189

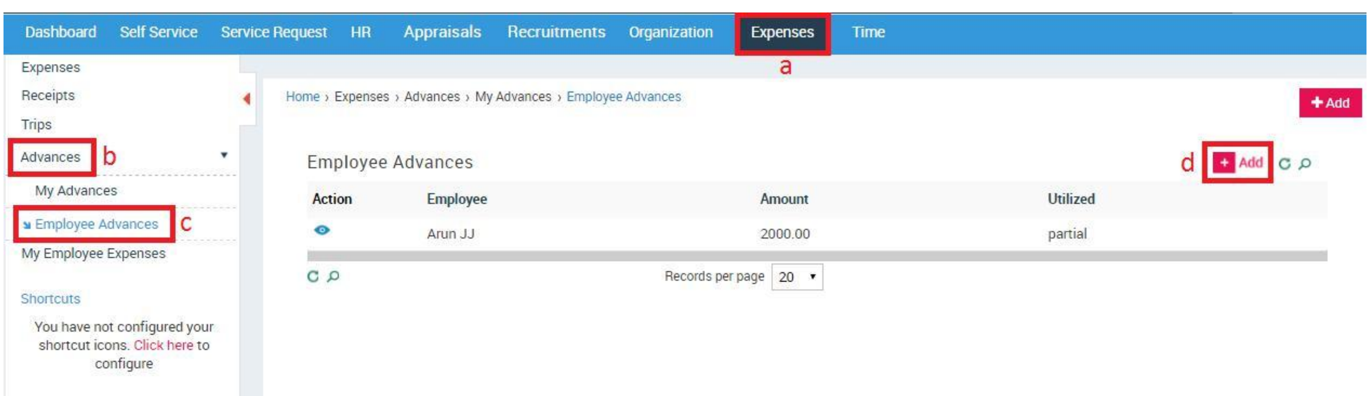


Figure 189

a. Click **Expenses** in the top menu
b. Click **Advances** on the left menu panel
c. Click **Employee Advances** in the submenu
d. Click **+Add** Button

Please refer Figure 190

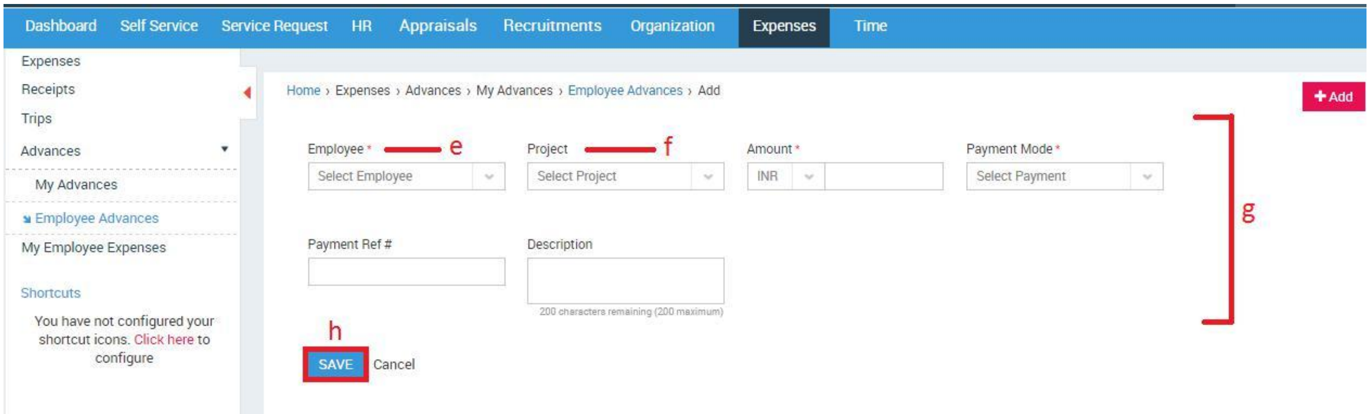


Figure 190

e. Employees reporting to you will be populated in the drop down option
f. The Employee's projects will be populated here
g. Enter the required details
h. Click **SAVE** button

14.16 How do I view the Advance allotted to me?

Please refer Figure 191

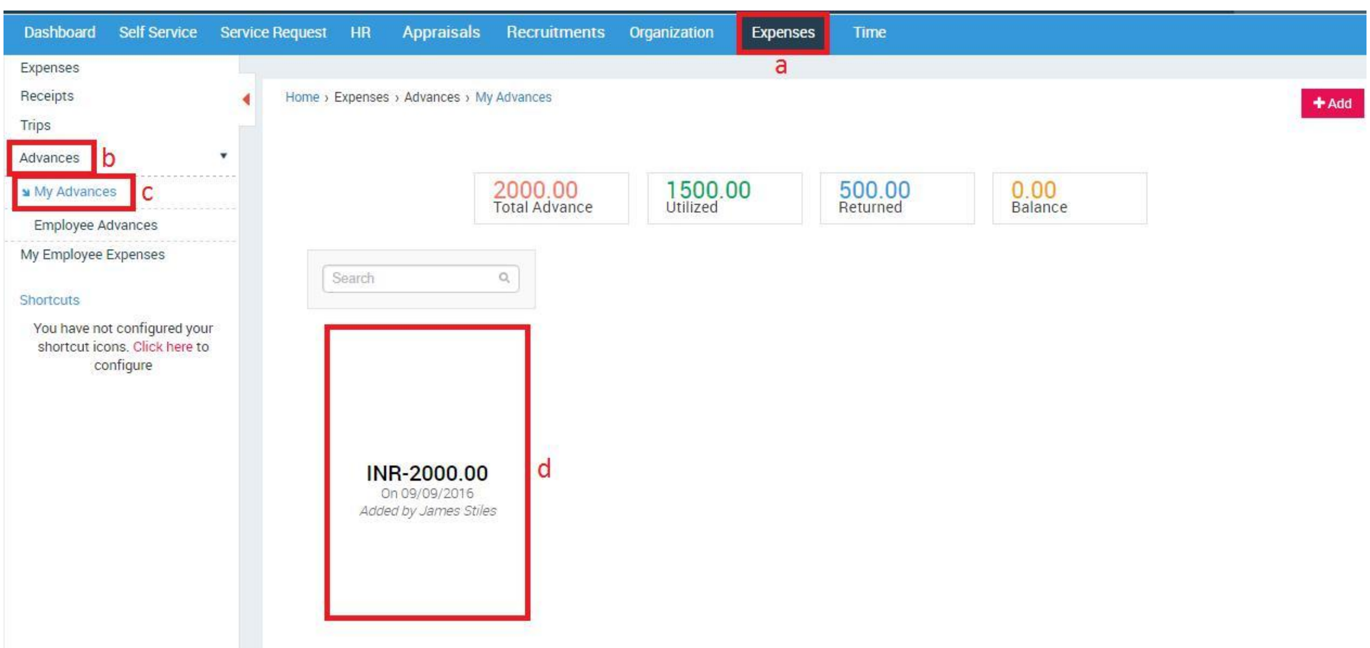


Figure 191

a. Click **Expenses** in the top menu

b. Click **Advances** on the left panel
c. Click **My Advances** in the submenu
d. You can view the advance amount and the person's name who has allotted you the advance

Please refer Figure 192

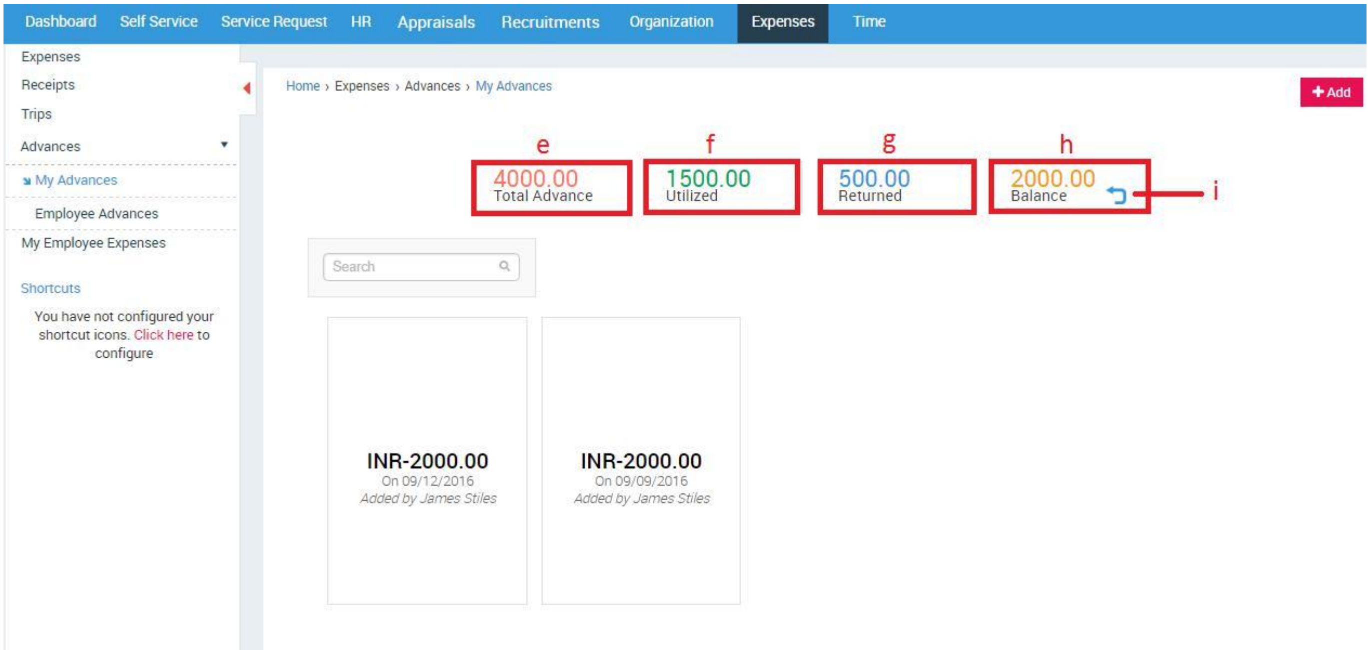


Figure 192

e. Advance amount allotted to you
f. Advance amount utilized by you
g. Advance amount returned by you
h. Balance Advance amount
i. Click here to return Advance amount

A small pop up window will open.

Please refer Figure 193

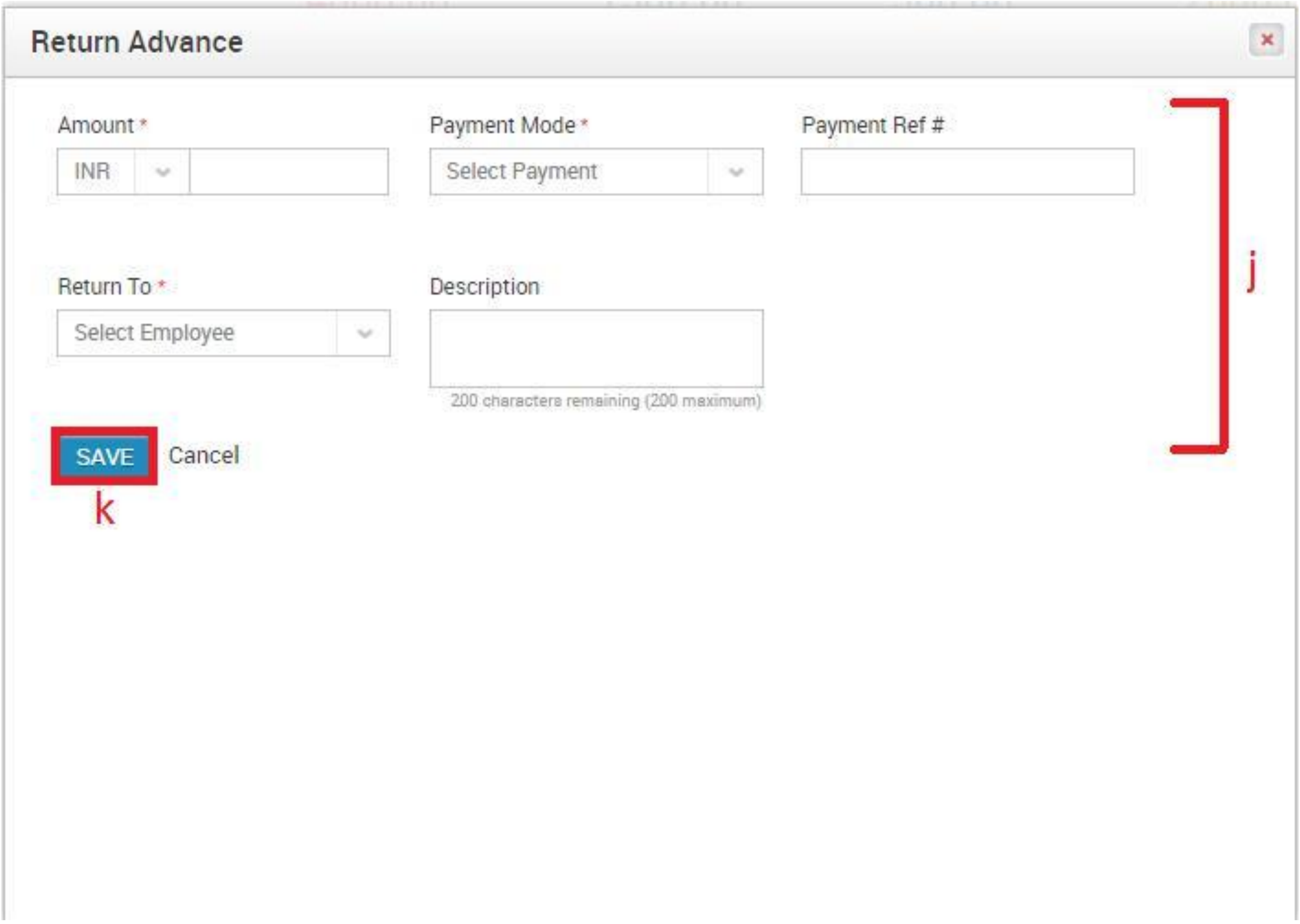
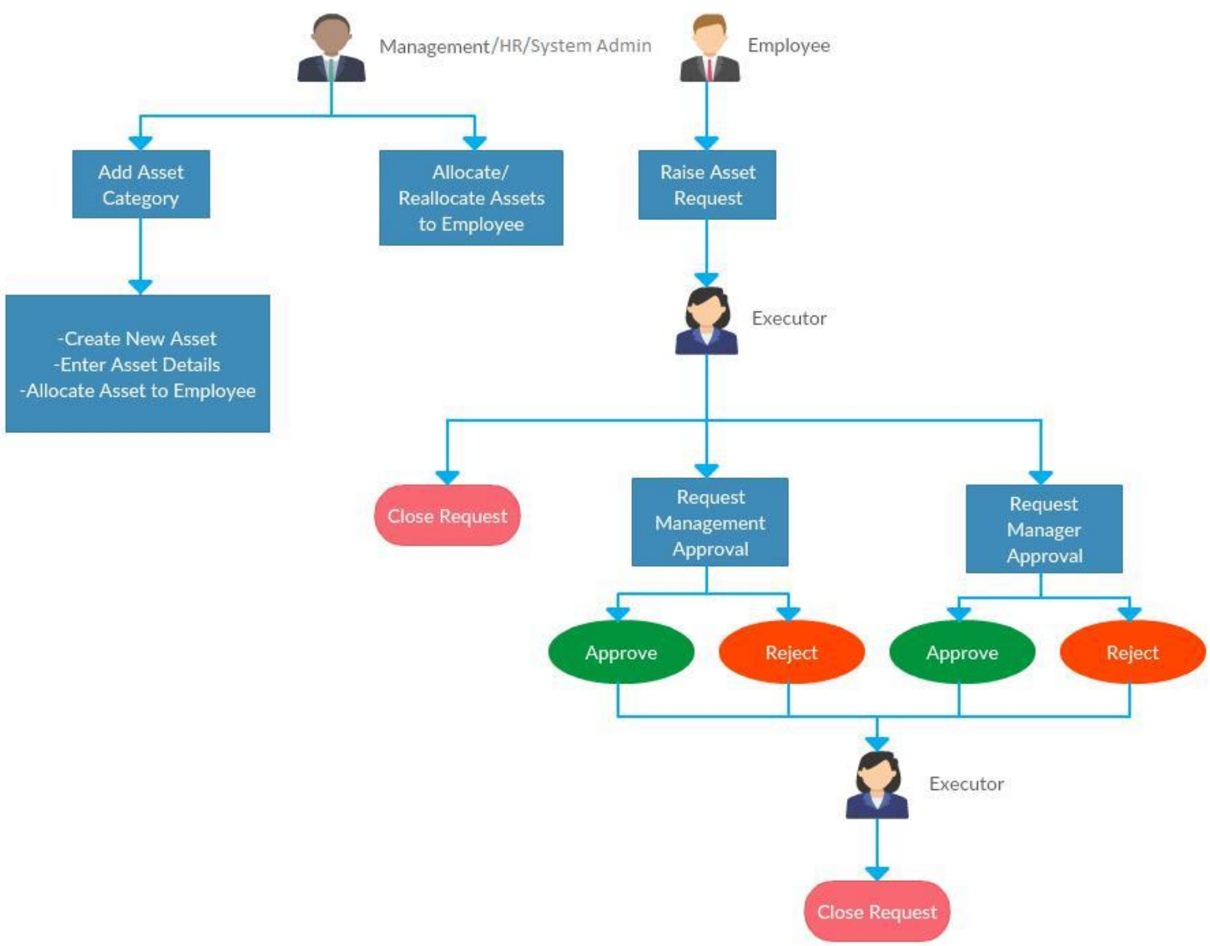


Figure 193

j. Enter the required details
k. Click **SAVE** button

15. Assets

Keep a track of your organization's assets like computers, laptops, phones etc. and assign them to employees. It enables the Employers to have quick access to information related to all the assets in the organization. A user can create asset categories and subcategories. Asset details such as invoice number, vendor details, warranty status, asset images etc. can be added and then assigned to employees.



Process Description:

- User (Management/HR/System Admin) can add a new Asset Category
- User then creates a new asset by providing asset details and allocating that asset to an employee
- User can allocate/reallocating existing assets to employees

- A User (Any User/Employee who has a reporting manager) raises an asset request.
- The Executor(s), Viewer(s) and the User will receive an email notification.
- The Executor has 3 options:
  - He/she can execute and close the service request
  - Request for Management's approval

- Request for User's manager's approval

- The actual execution takes place offline If the Executor has requested for either User's Reporting Manager or Management's approval, then the request can be closed once one/both of them have approved
- If the User's Reporting Manager or Management reject the request, then the executor can close the request
- The Reporting Manager or Management will receive an email notification if an approval is sought from them by the executor(s).

15.1 How do I create an Asset Category?

Please refer Figure 194

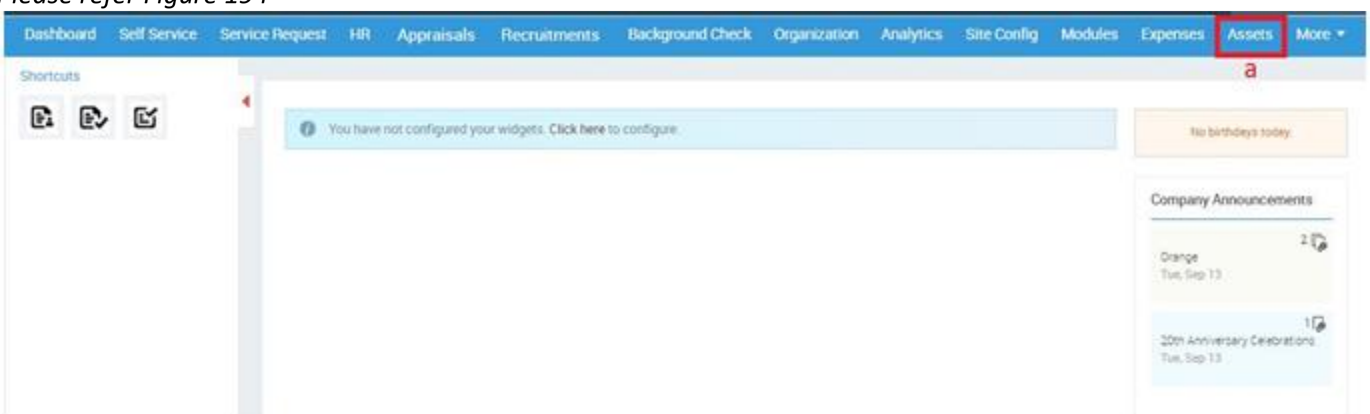


Figure 194

a. Click **Assets** in the top menu

Please refer Figure 195

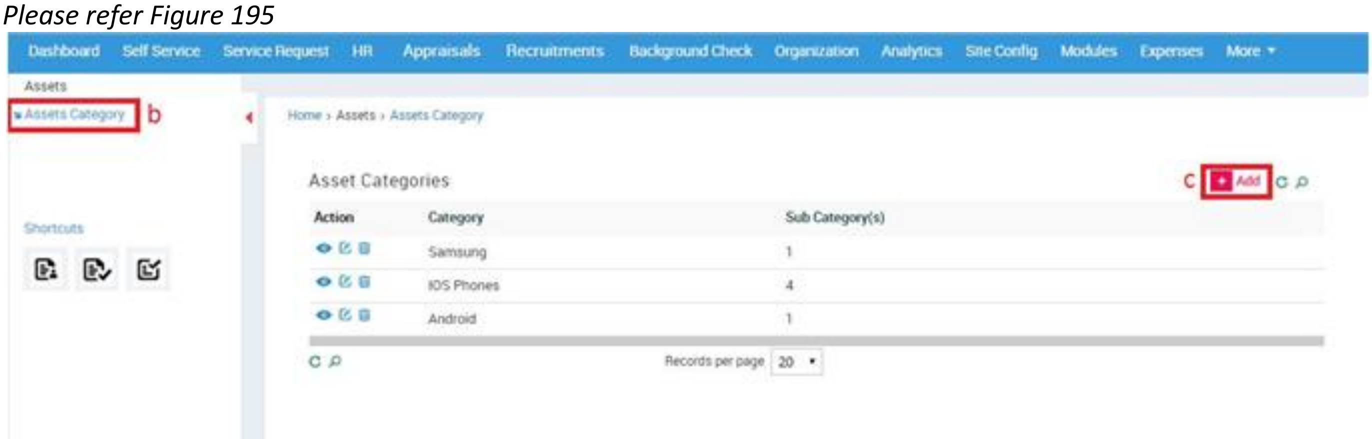


Figure 195

b. Click **Asset Category** on the left panel
c. Click **+Add** button

Please refer Figure 196

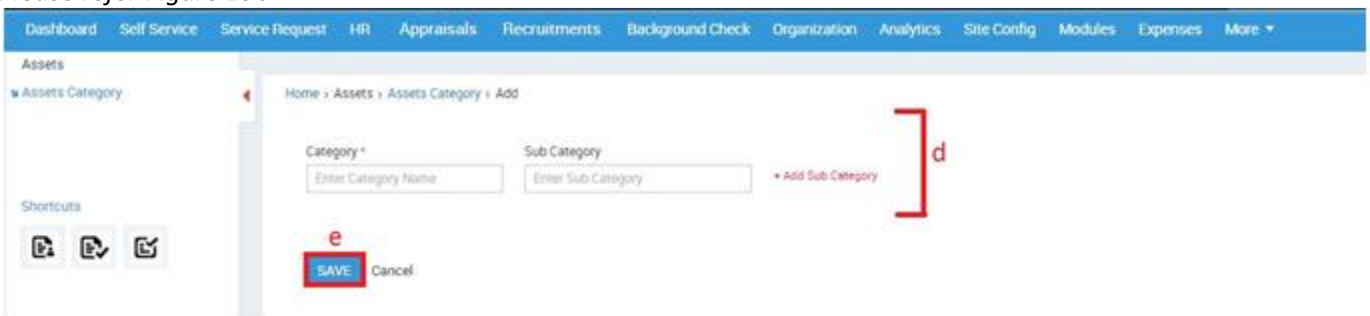


Figure 196

d. Enter the required details
f. Click **SAVE** button

15.2 How do I add an Asset?

Please refer Figure 197

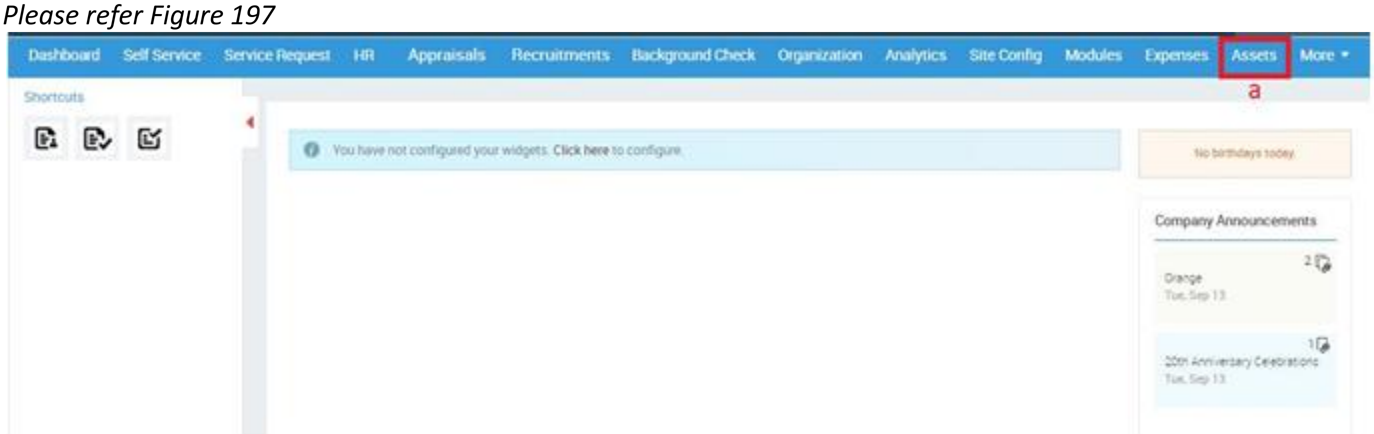


Figure 197

a. Click **Assets** in the top menu

Please refer Figure 198

Figure 198

b. Click **Assets** on the left panel
c. Click **+Add** button

Please refer Figure 199

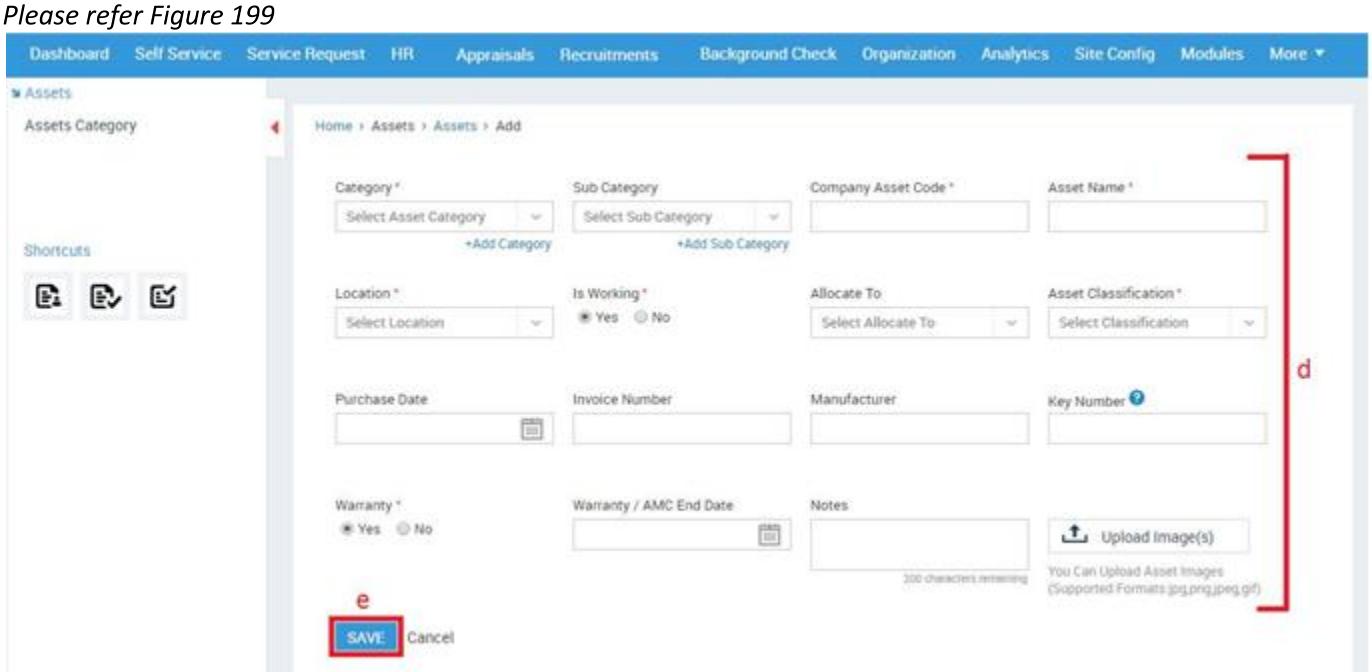


Figure 199

d. Enter the required details
e. Click **SAVE** button

15.3 How do I view my Asset(s) details?

Please refer Figure 200

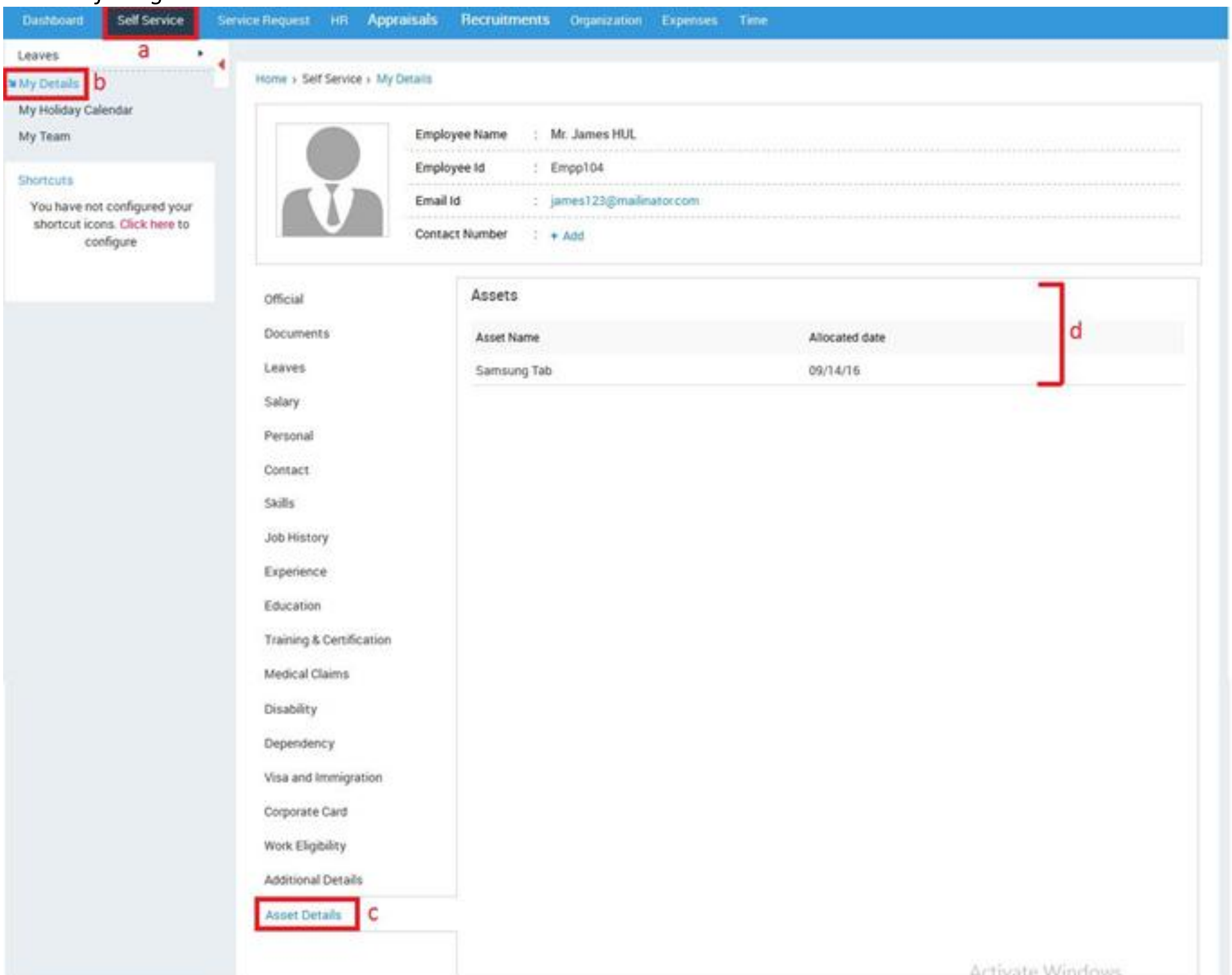


Figure 200

a. Click **Self Service** in the top menu
b. Click **My Details** on the left menu panel
c. Click **Asset Details** menu option on the form's left side
d. View your details here

15.4 How do I raise a Service Request related to my Asset?

Please refer Figure 201

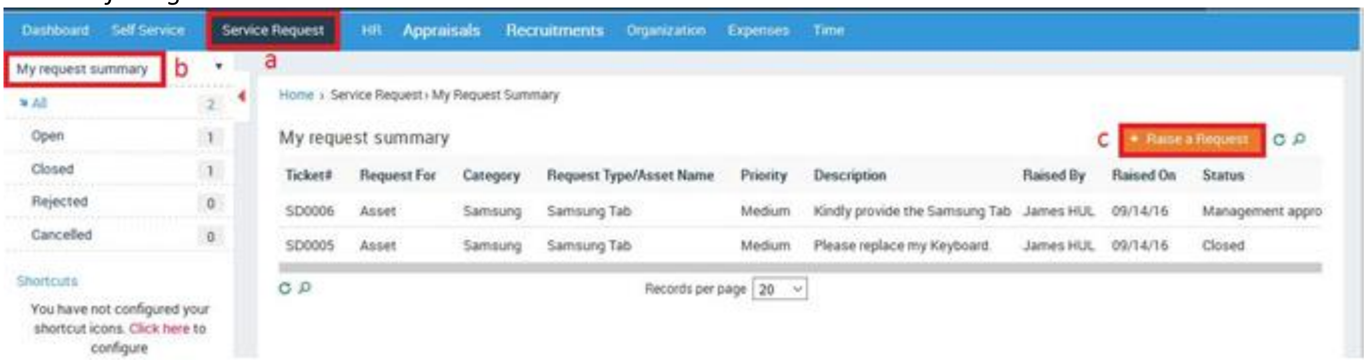


Figure 201

a. Click **Service Request** in the top menu
b. Click **My request summary** on the left menu panel
c. Click **+Raise a Request** button on the right side

Please refer Figure 202

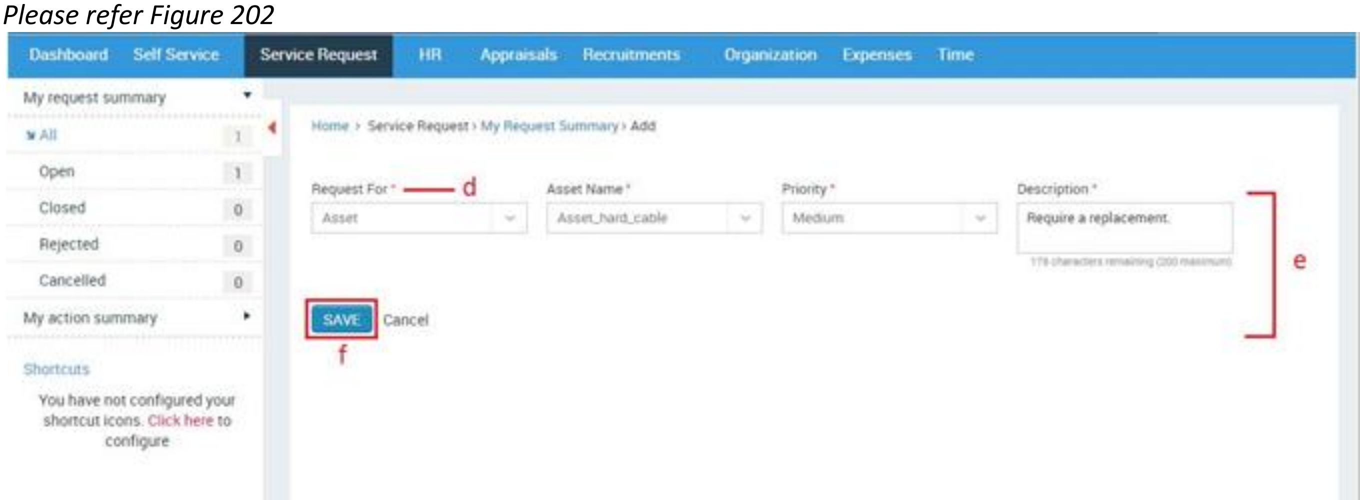


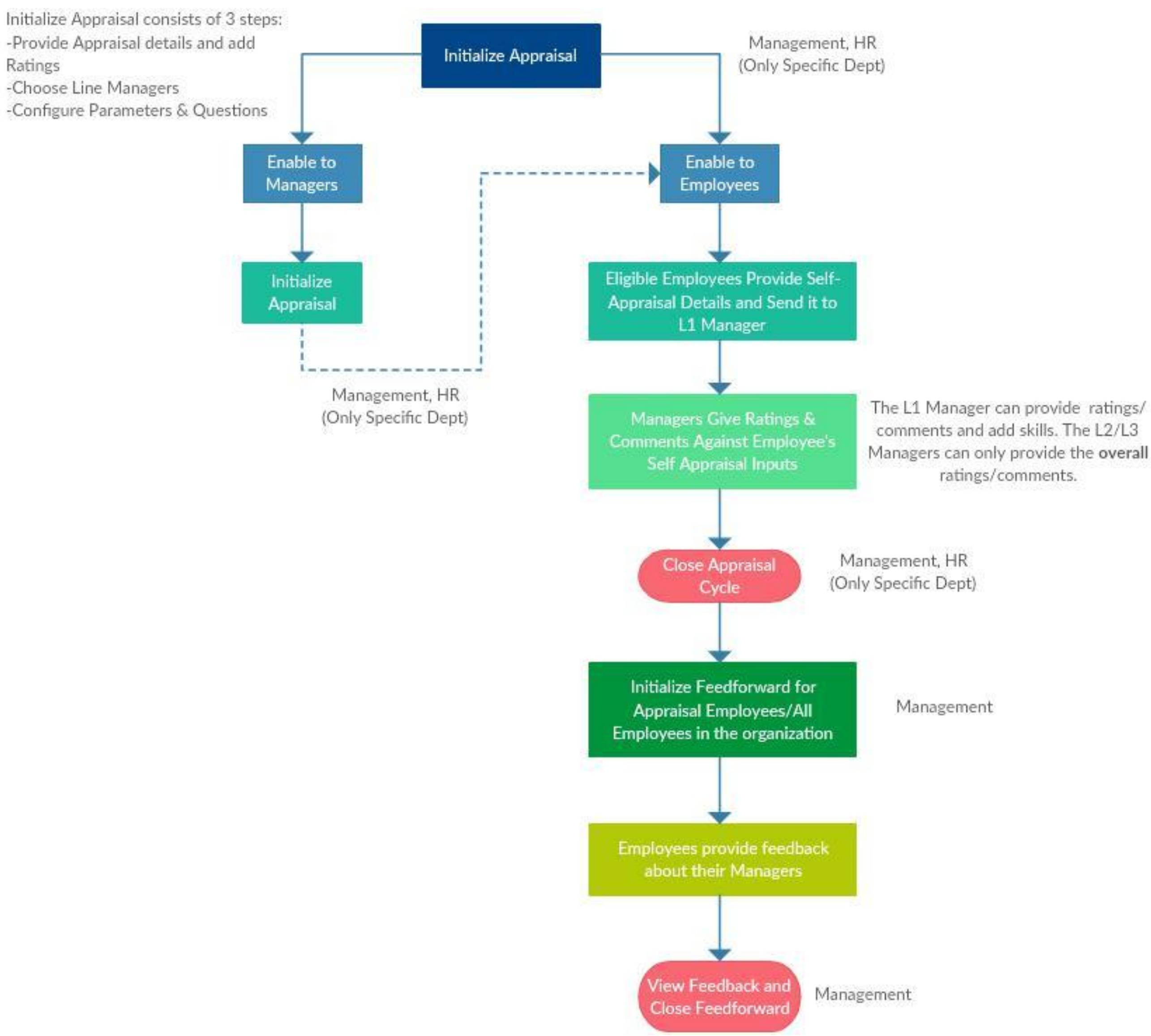
Figure 202

d. Select **Asset** in the field 'Request For'
e. Fill in the required details
f. Click **SAVE** button

An asset name will only be populated if an asset is allocated to the employee. Also, please ensure the asset category is configured in:
Service Request > Configuration > Settings > +Add

16. Appraisals

Performance Appraisal is a systematic evaluation of Employees' performance and to understand their abilities for further career transition. It is generally done by the supervisors on the basis of factors such as parameters, questions, ratings etc. In HRMS, the appraisal is configured for an entire business unit or for a specific department. Below is the flowchart of the appraisal process followed in HRMS:



Process Description:

- A User (Management/*HR for only specific department*) initializes an appraisal
- The appraisal can be enabled to Managers/Employees
- If it is initialized to the Managers first, then they can assign questions in addition to the ones set by the User who initialized the appraisal.
- After the Managers submit their questions, the appraisal can be enabled to the Employees. (If you don't require a Manager to provide additional questions, then you can directly enable the appraisal to the Employees)
- The eligible Employees will submit their self-appraisal and send it to their L1 Manager.
- L1 Managers will provide their comments and ratings for each question and overall comment and rating for the Employees
- Depending on the number of appraisal levels selected, the L2/L3.. Managers can only provide overall rating and comment
- The User will close the appraisal cycle
- Management will initialize feedforward for Employees who have completed their appraisal or for all Employees
- Employees will provide feedback about their Managers
- Management will view the feedback and close the feedforward process

16.1 How do I add Parameters?

Parameters define the performance indicators defined by the supervisors to assess the capabilities of the Employees.

Please refer Figure 203

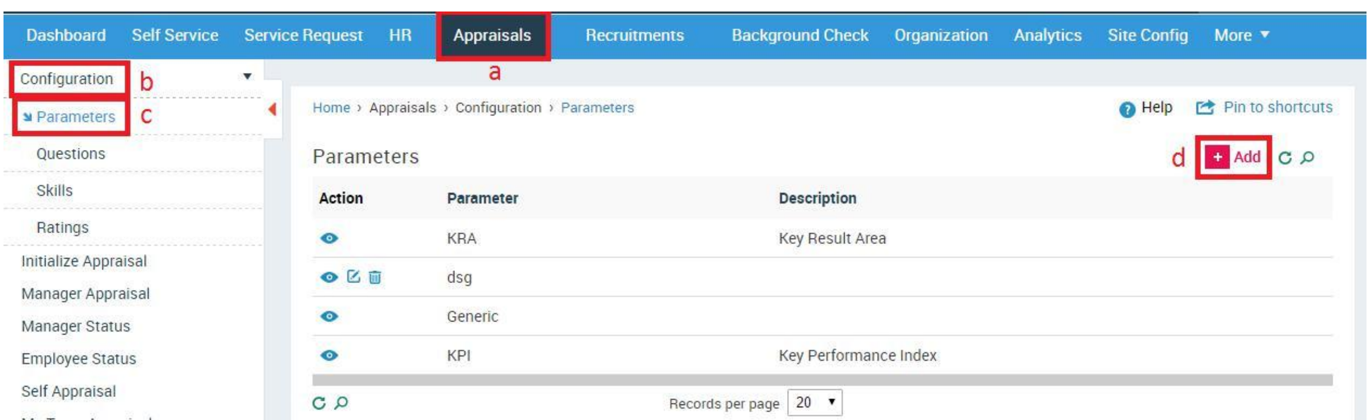


Figure 203

a. Click **Appraisals** in the top menu
b. Click **Configuration** on the left menu panel
c. Click **Parameters** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 204

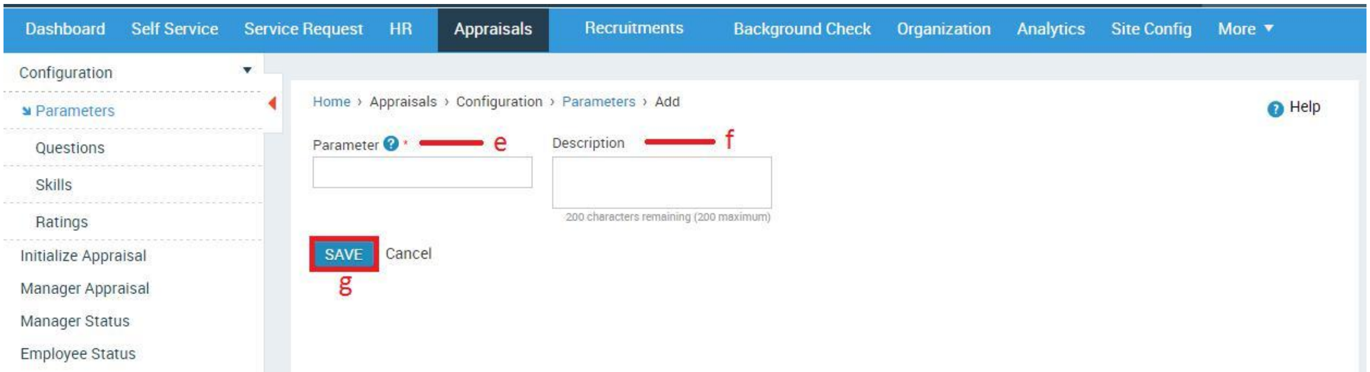


Figure 204

e. Enter the parameter
f. Provide Description
g. Click **SAVE** button

16.2 How do I add Questions?

Questions are determined for each parameter defined in the parameters section. For each parameter, the supervisor can provide more than one question.

Please refer Figure 205

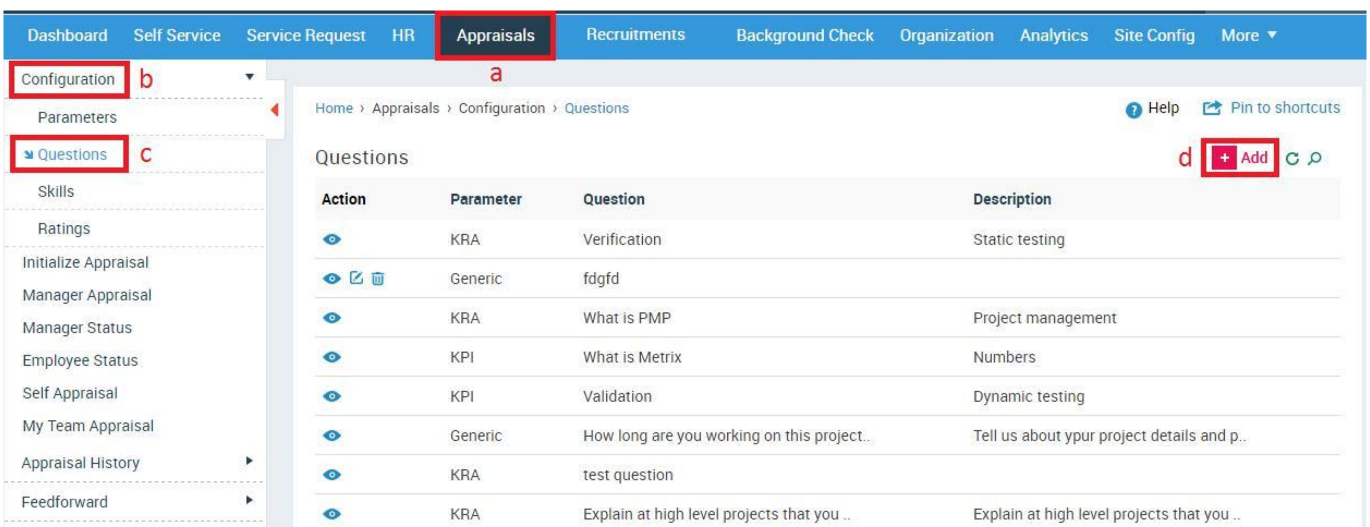


Figure 205

a. Click **Appraisals** in the top menu
b. Click **Configuration** on the left menu panel
c. Click **Questions** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 206

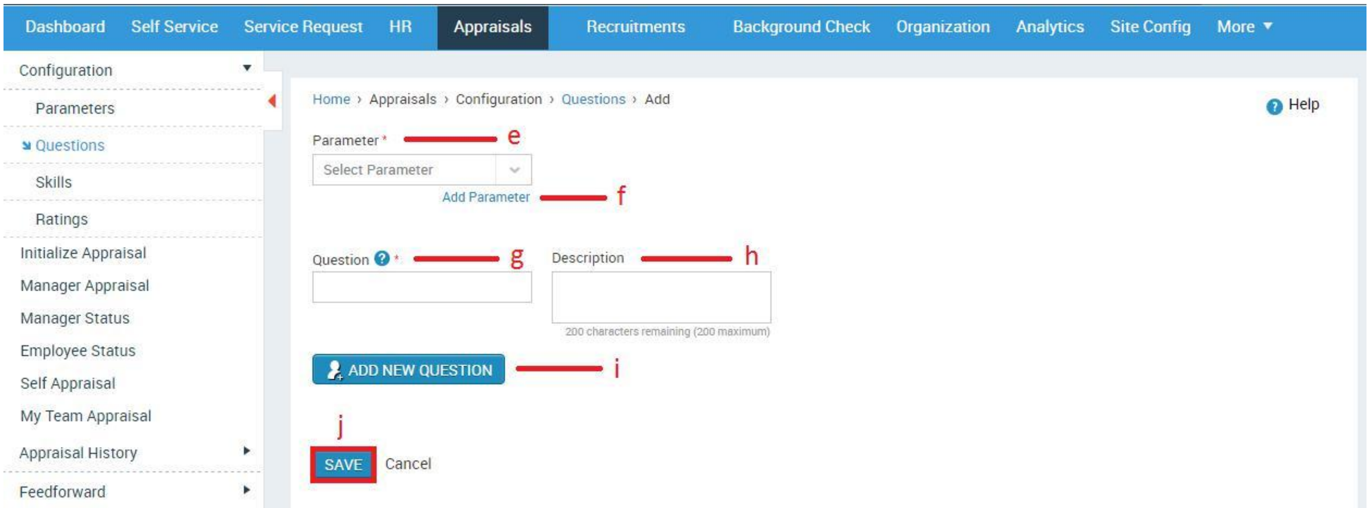


Figure 206

e. Select a parameter from dropdown
f. Add other parameter
g. Enter the question
h. Provide description
i. Click **ADD NEW QUESTION** to add a new question
j. Click **SAVE** button

16.3 How do I add Skills?

Skills are the skill set that enhances the Employee's profile.

Please refer Figure 207

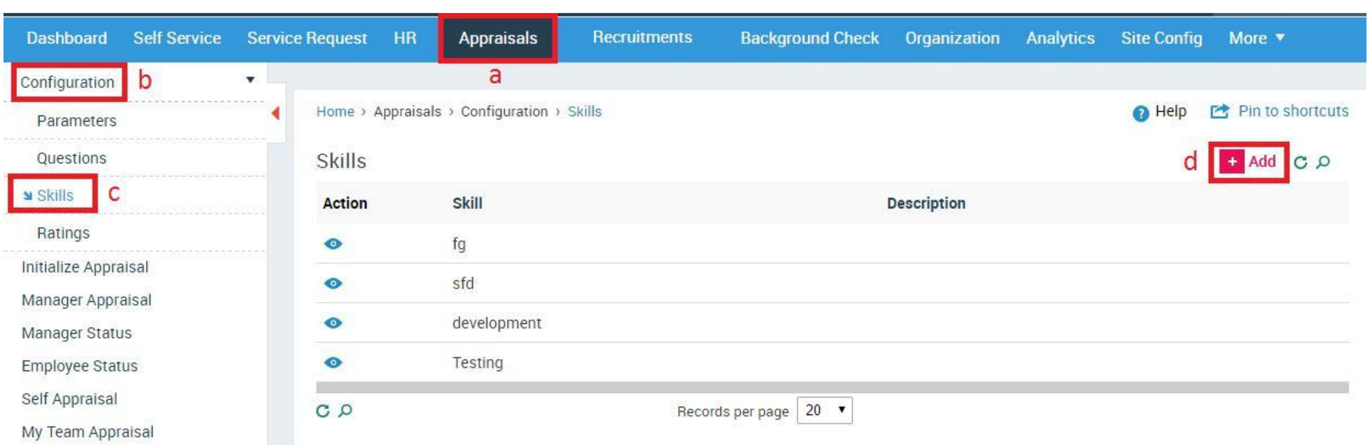


Figure 207

a. Click **Appraisals** in the top menu
b. Click **Configuration** on the left menu panel
c. Click **Skills** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 208

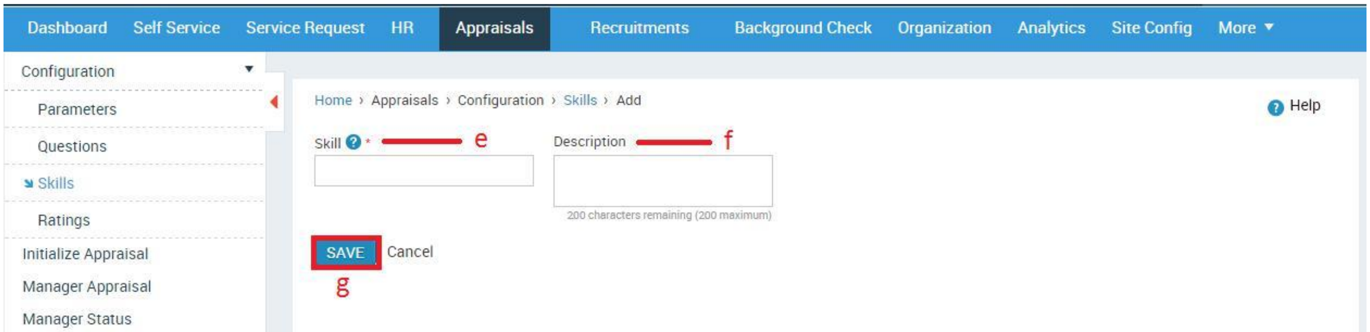


Figure 208

e. Enter the skill
f. Provide description if necessary
g. Click **SAVE** button

16.4 How do I add Ratings?

You can add Ratings after completing the first step of Initialize Appraisal. This option is only for editing existing Ratings, provided Employees have not initiated the self-appraisal process

Ratings are defined for each business unit or department. The rating scales **1-5** and **1-10** are available in HRMS.

Please refer Figure 209

Figure 209

a. Click **Appraisals** in the top menu
b. Click **Configuration** on the left menu panel
c. Click **Ratings** in the submenu
d. Click **Edit** icon on the right side

Please refer Figure 210

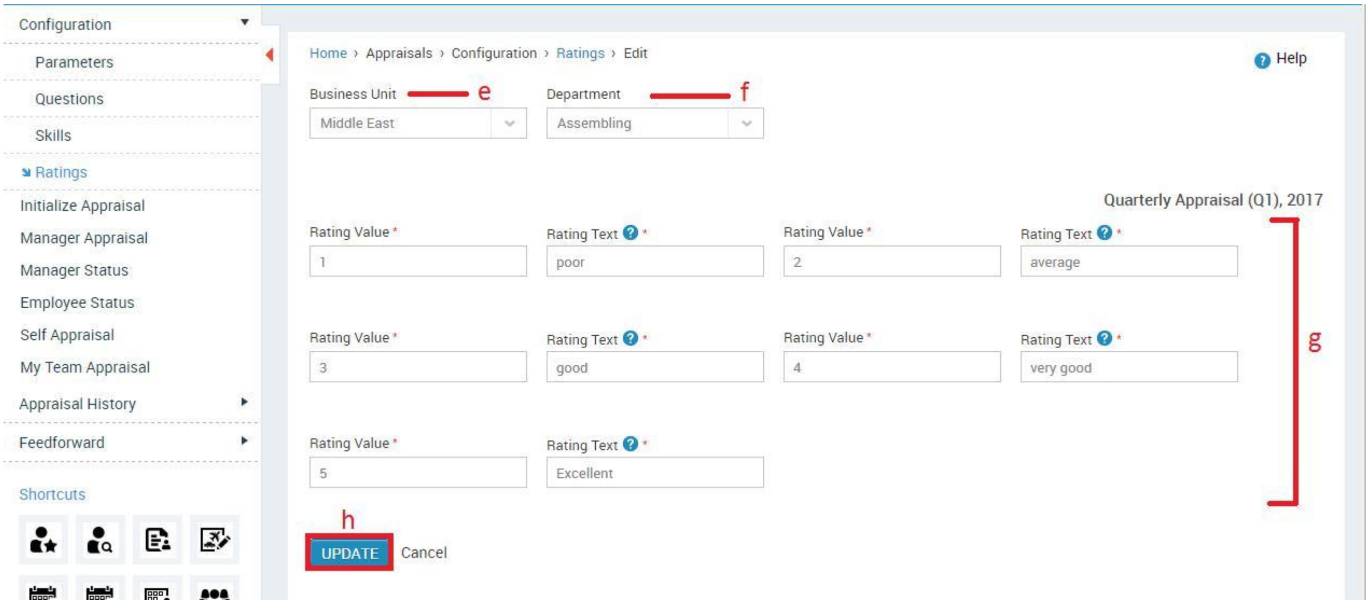


Figure 210

e. Select a Business Unit from the dropdown list
f. Select a Department from the dropdown list
g. Provide rating text for each rating value
h. Click **UPDATE** to save the ratings

After configuring the essential details, the next step is the initialization of the appraisal process.

16.5 How do I Initialize an Appraisal process?

Please refer Figure 211

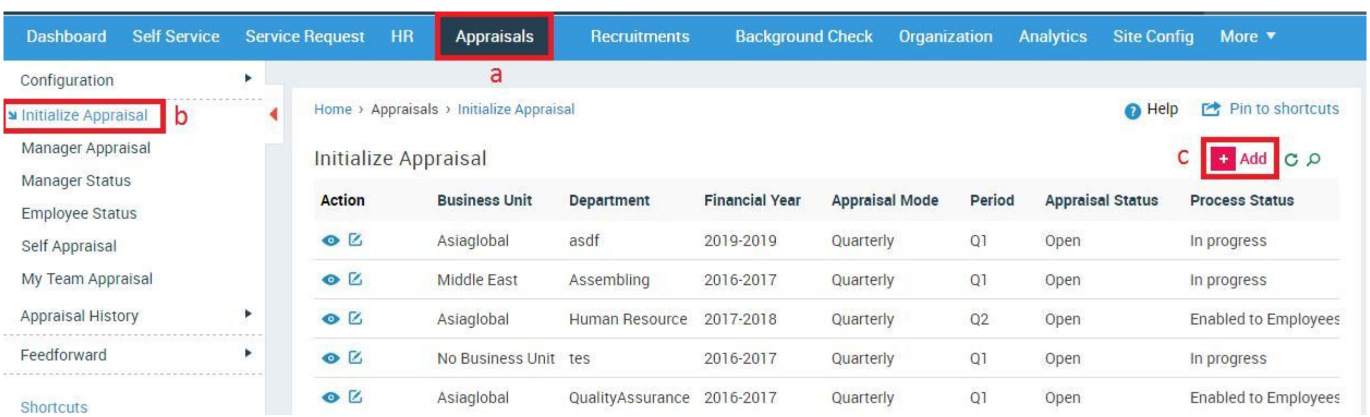


Figure 211

a. Click **Appraisals** in the top menu
b. Click **Initialize Appraisal** on the left menu panel
c. Click **+Add** button

Please refer Figure 212

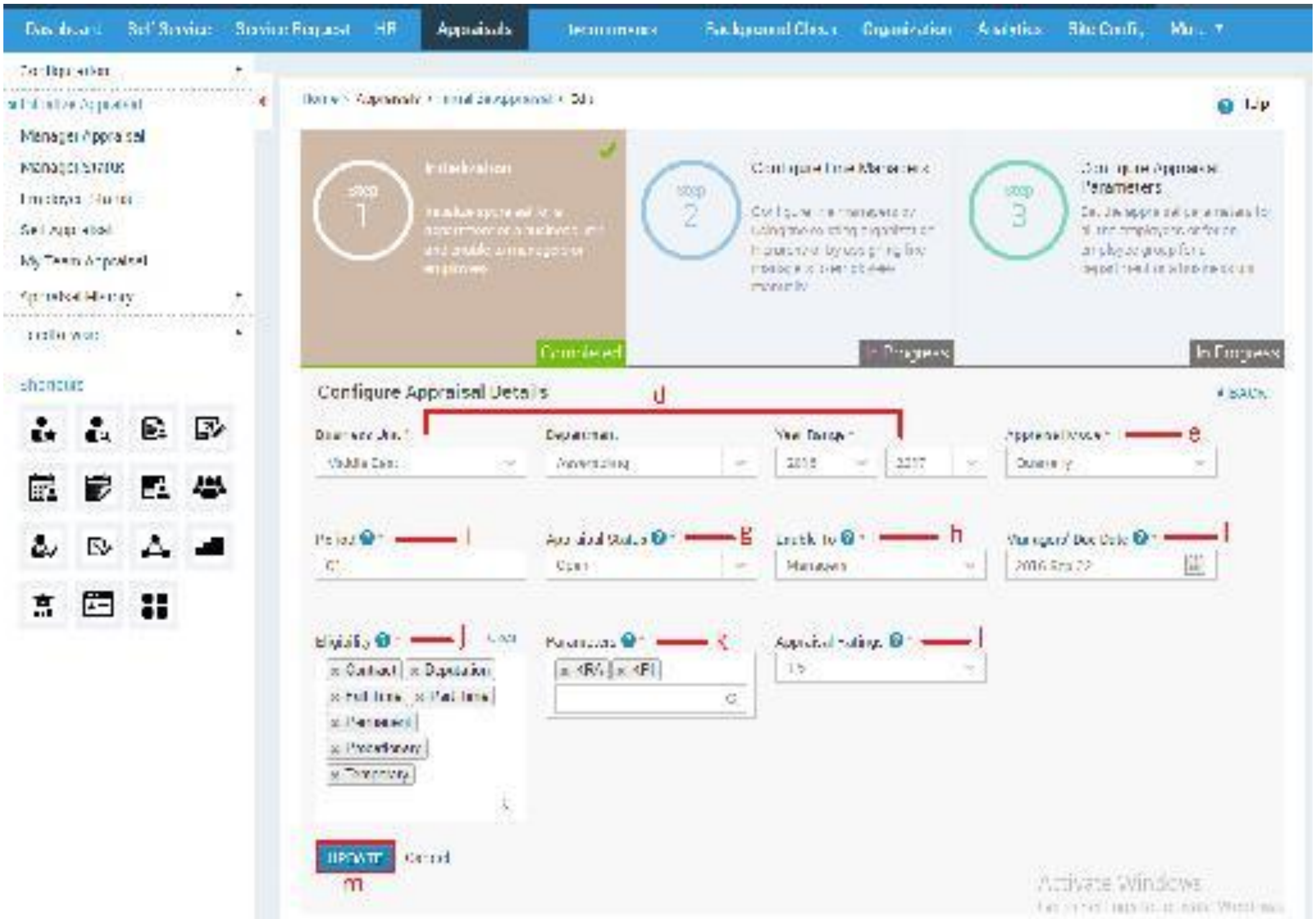


Figure 212

Step 1: Initialization

d. Enter the required details (Business Unit, Department, Year Range)
e. There are 3 appraisal modes available: Quarterly (Q1, Q2, Q3, Q4), Half-Yearly (H1, H2), Yearly
f. Period will be populated automatically depending on the appraisal mode you have selected
g. Appraisal Status is by default 'Open' in Initialize appraisal
h. Select an option in 'Enable To' dropdown. You can enable to Managers/Employees
i. Based on the Enable To option, set a due date for the Employees/Managers to submit the appraisal details
j. Select one or more eligibility criteria (Employees who are eligible for the appraisal process)
k. Select parameter(s)
l. Select a Ratings range (1-5 or 1-10)
m. Click **SAVE** button to initialize appraisal for a Business Unit/Department

You will need to define the ratings before you proceed to **Step 2.**

Please refer Figure 213

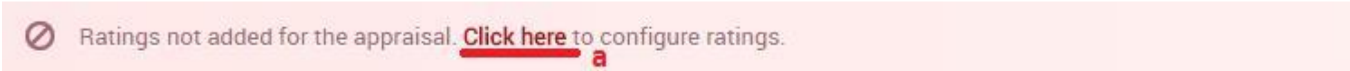


Figure 213

a. Click here to provide text to represent the rating numbers

Please refer section How do I add Ratings? to find out how to provide rating text.

Step 2: Configure Line Managers

Once the appraisal process is initiated for a Business Unit/Department, the Line Managers must be configured to evaluate the Employees' appraisal.

The Line Managers can be configured in two ways:

1. Choose by Organization Hierarchy

- Establish appraisal process as per the organization hierarchy where the Line Managers will be the same as the Reporting Managers
- Define the number of appraisal levels and assign Line Managers to the Employees
- Save the configuration to apply to the selected department or business unit

Please refer Figure 214

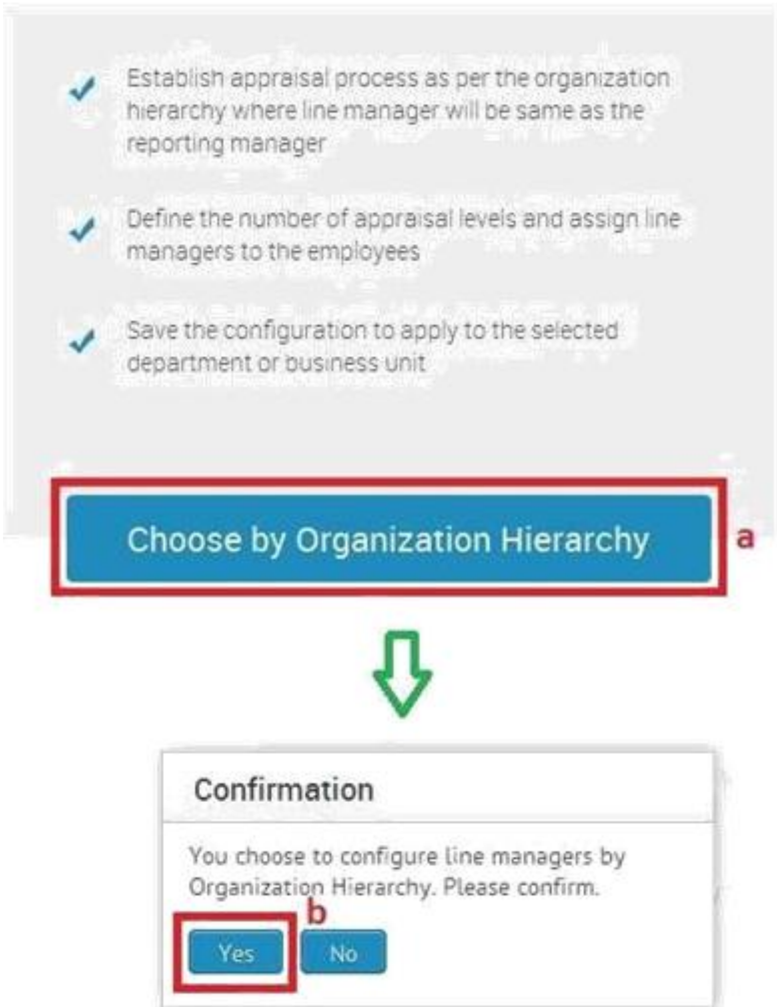


Figure 214

a. Click **Choose by Organization Hierarchy** button

A small confirmation window will appear.

b. Click **Yes** button

Please refer Figure 215

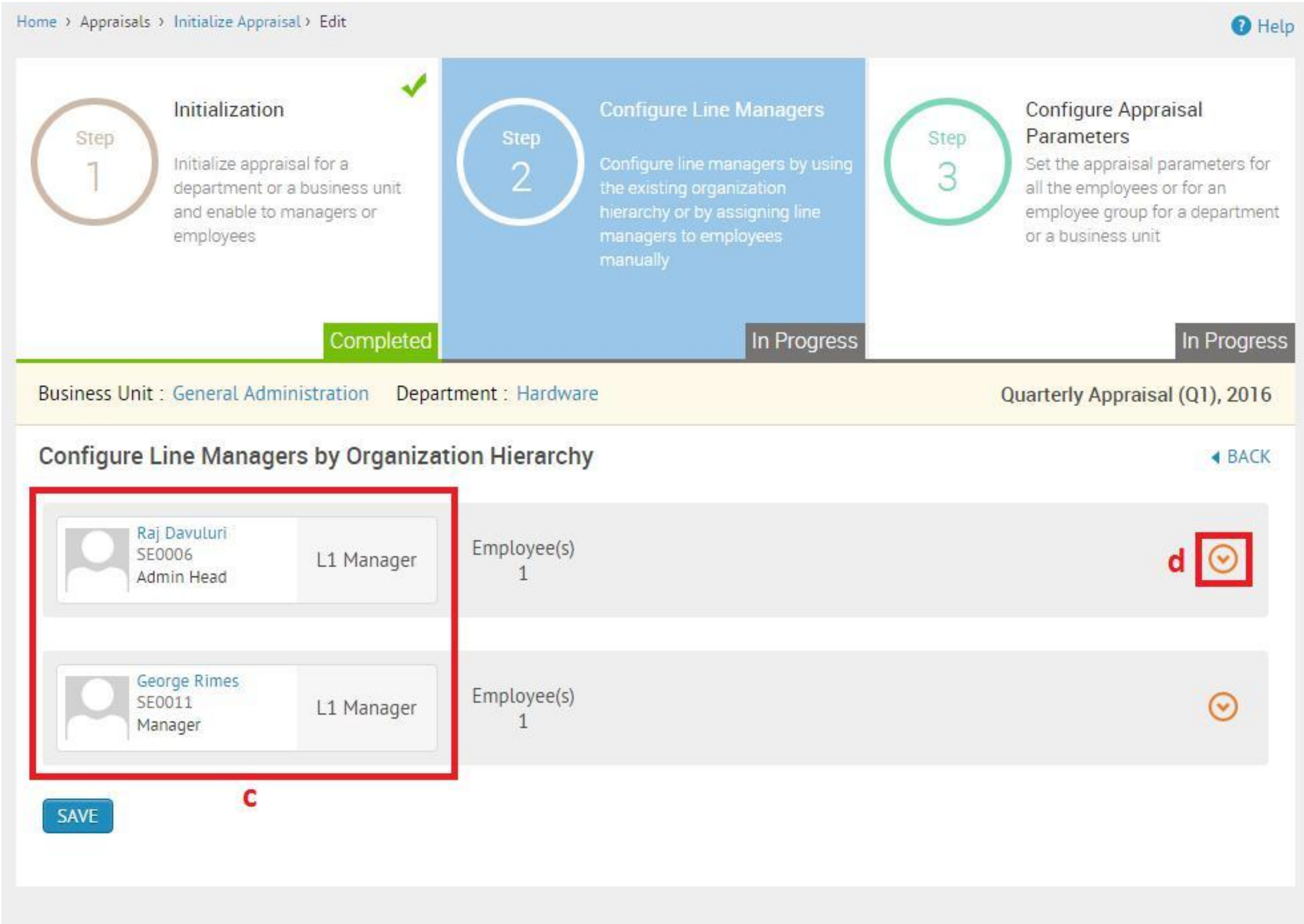


Figure 215

c. Manager(s)' names will be displayed
d. Click here to view the Employees reporting to the displayed Managers

Please refer Figure 216

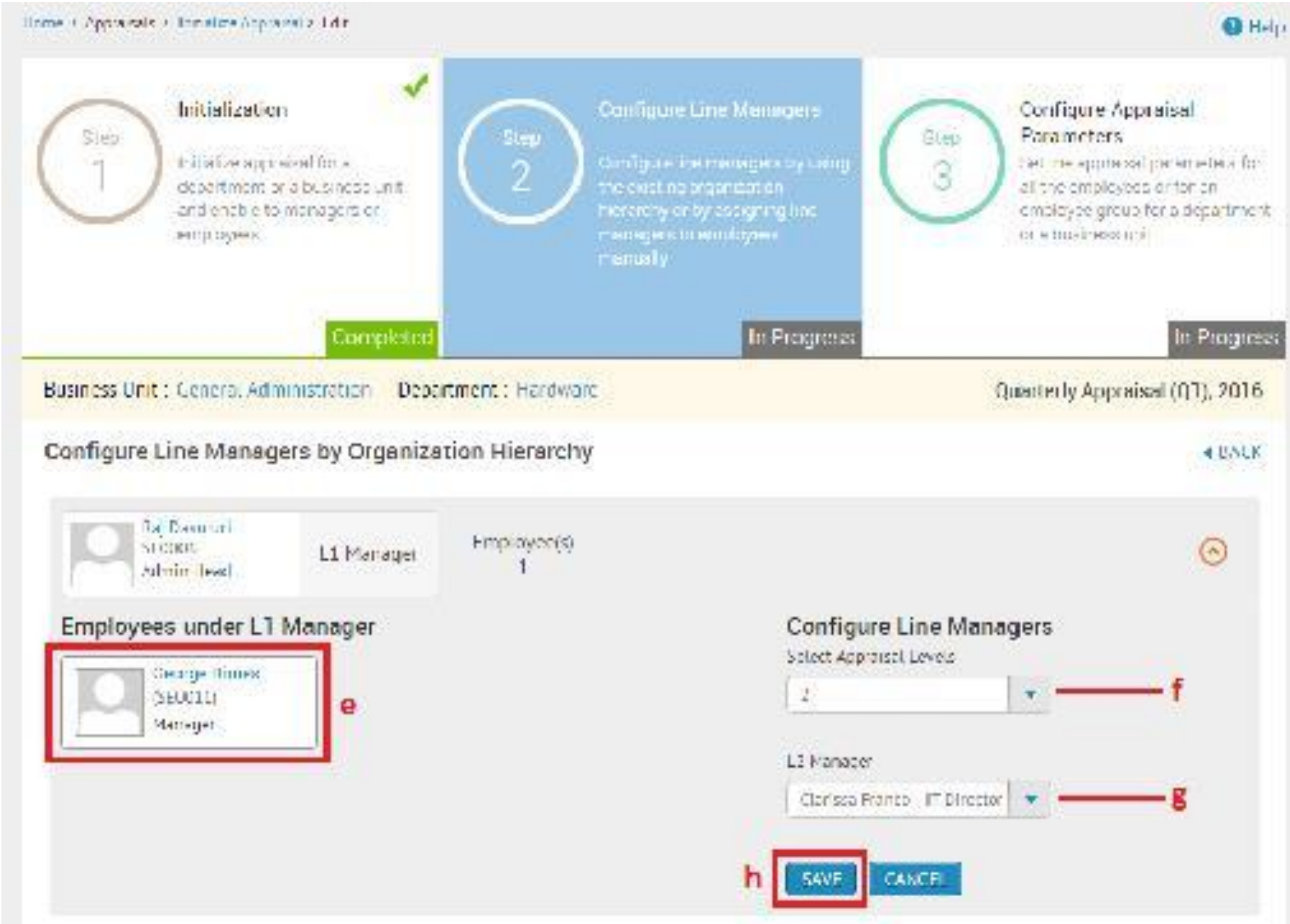


Figure 216

e. The Employees reporting to the Manager will be displayed here
f. Select the number of appraisal levels you want (We have selected ‘2’ in this example). You can have a maximum of 5 appraisal levels.
g. Select your L1/L2… Manager(s)
h. Click **SAVE** button

> If you have only 1 appraisal level, then you don’t need to select any appraisal level. Click **SAVE** button to proceed to the next step.

2. Assign Line Managers to Employees

- Define the number of appraisal levels
- Determine the Line Managers as per the selected appraisal levels
- Add or remove Employees based on the selected Line Managers

Please refer Figure 217

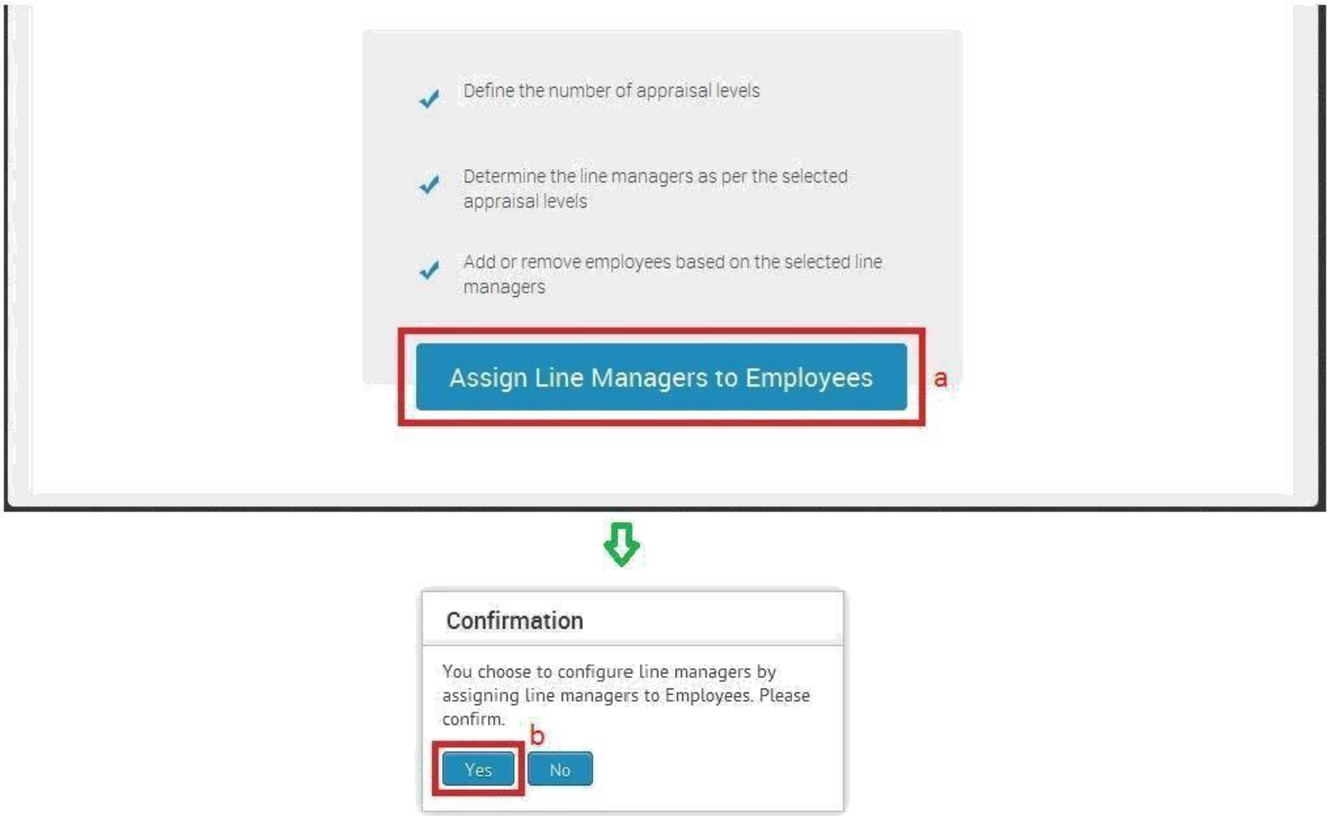


Figure 217

a. Click **Assign Line Managers to Employees**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 218

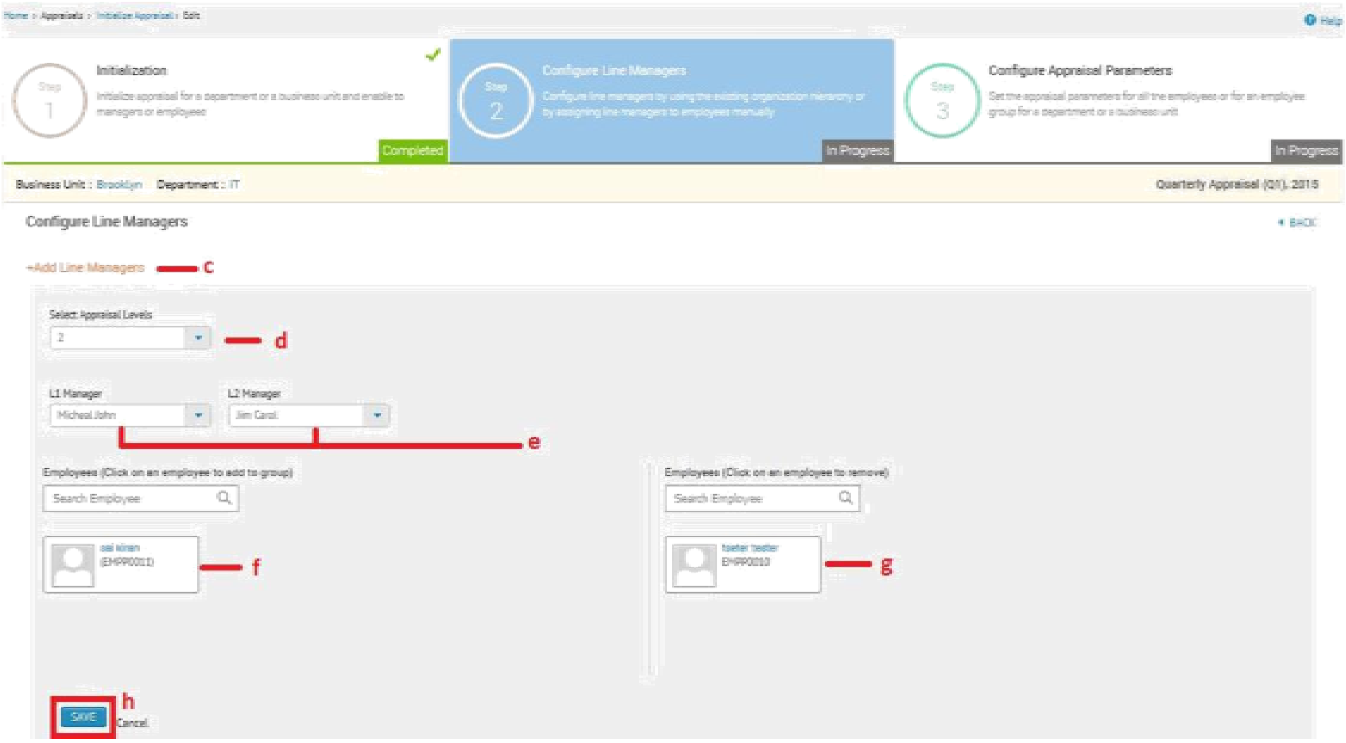


Figure 218

c. Click **+Add Line Managers**
d. Select the number of appraisal levels
e. Based on the number of appraisal levels, select the Line Managers
f. Employees are displayed on the bottom left
g. Click on the Employee(s) on the left side to select them for the appraisal process
h. Click **SAVE** button

Step 3: Configure Appraisal Parameters

Configure the appraisal parameters after configuring the Line Managers. Here, the appraisal process can be made applicable to all Employees of the **Business Unit** or **Customized Employee Groups**. This step can be done in two ways:

1. **All Employees**

- Questions created for the selected parameters in initialization step will be displayed
- Choose or add questions to be enabled to all Employees for the selected business unit or department
- Choose ratings and/or comments for each question by Line Manager and Employee

Please refer Figure 219

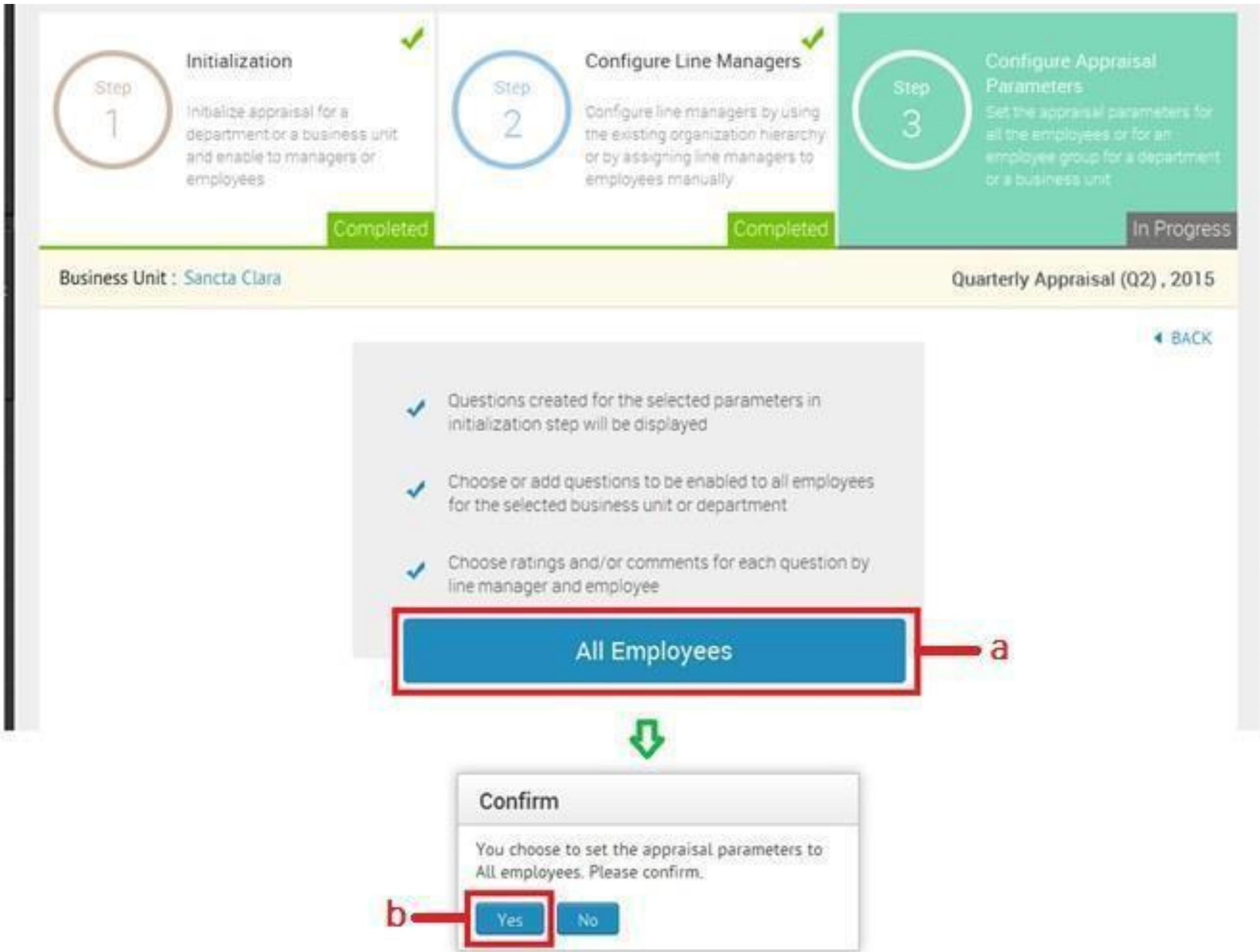


Figure 219

a. Click **All Employees**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 220

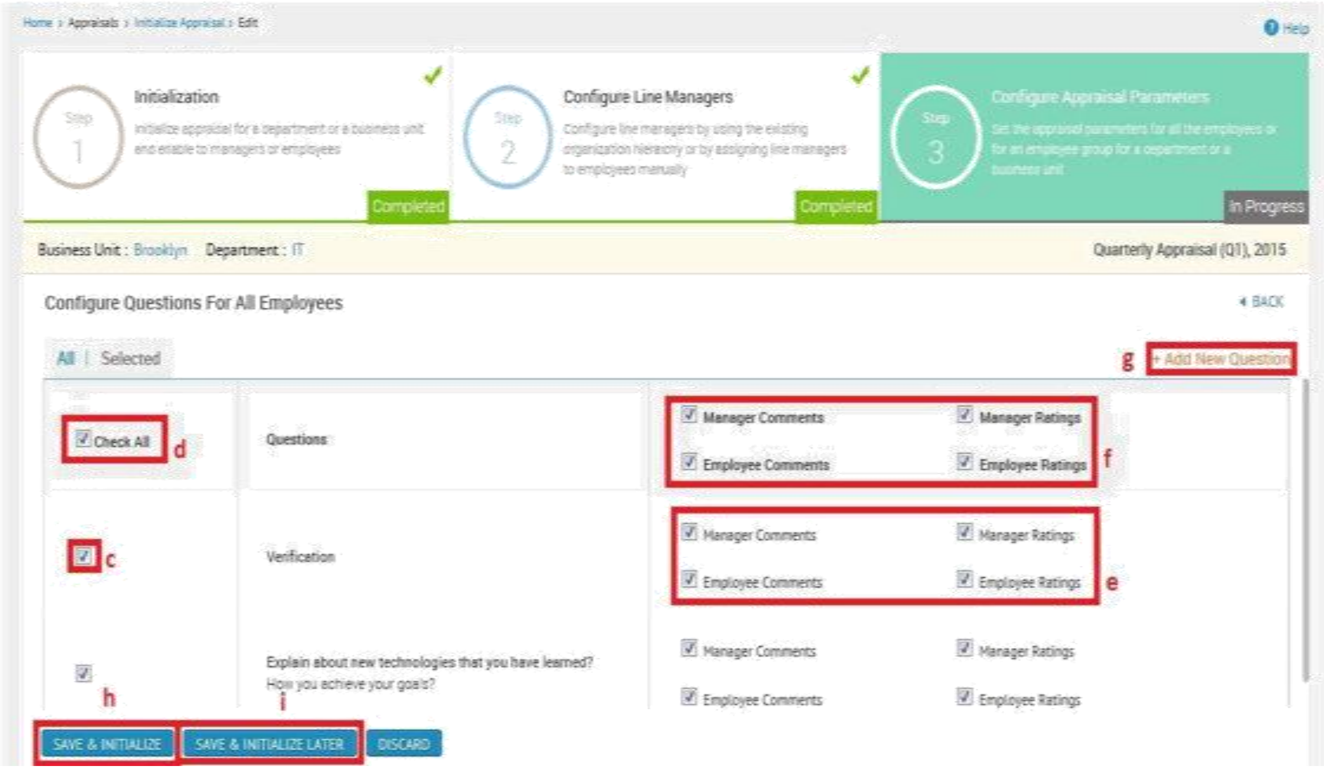


Figure 220

c. Select Questions individually by checking the checkbox respective to each question

Or

d. Select all the questions by checking the **Check All** option in the table header
e. Enable Manager/Employee Comments or Manager/Employee Ratings for a specific question. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.

Or

f. Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
g. Click **+Add New Question** option to add more questions to the appraisal process
h. Click **SAVE & INITIALIZE** button to initialize the appraisal

Or

i. Click **SAVE & INITIALIZE LATER** button to only save the appraisal details

2. Customized Employee Groups

- Apply appraisal parameters by grouping Employees
- Choose or add questions to be enabled to all Employees for the selected business unit or department
- Choose ratings and/or comments for each question by Line Manager and Employee

Please refer Figure 222

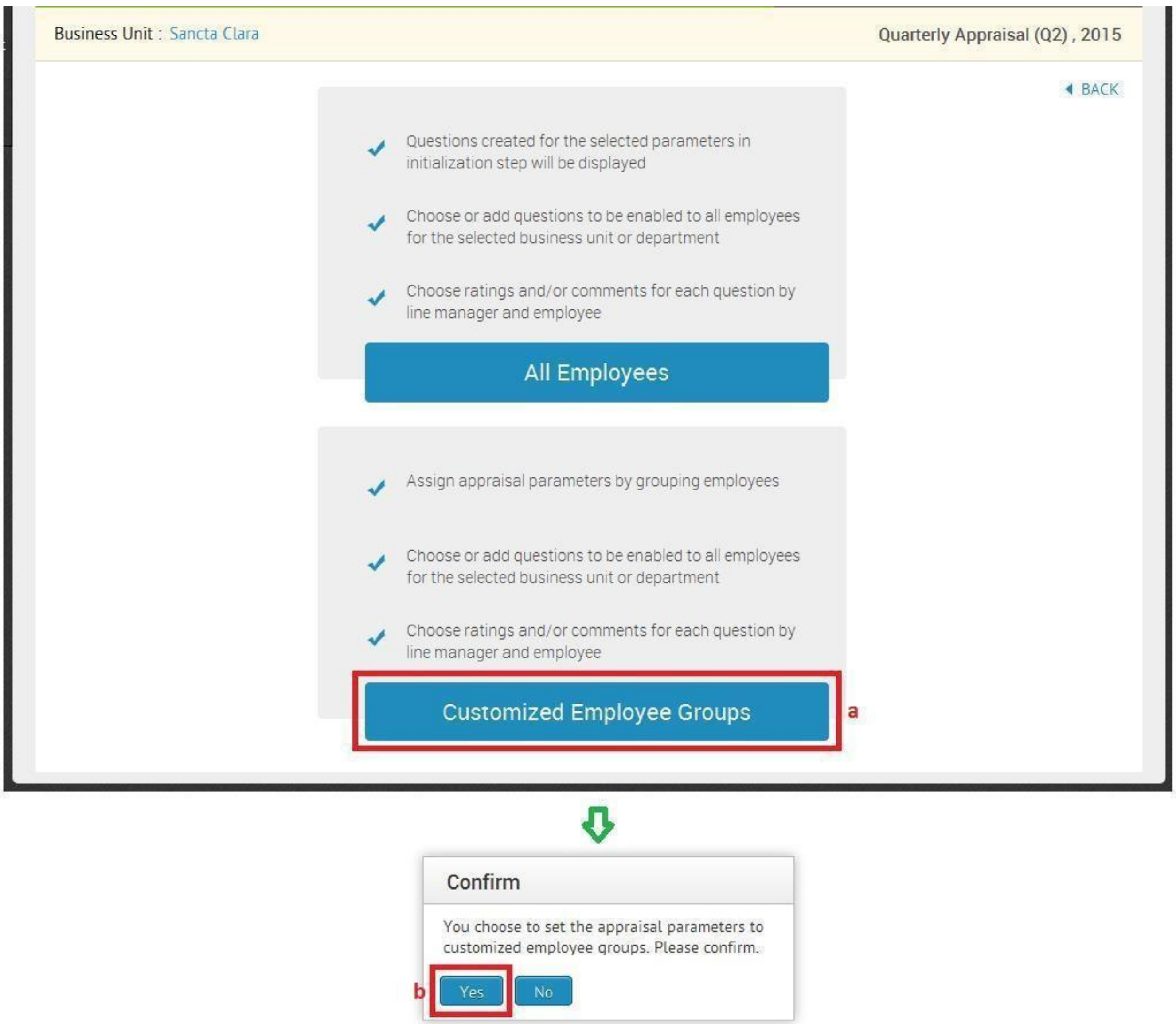


Figure 222

a. Click **Customized Employee Groups**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 223

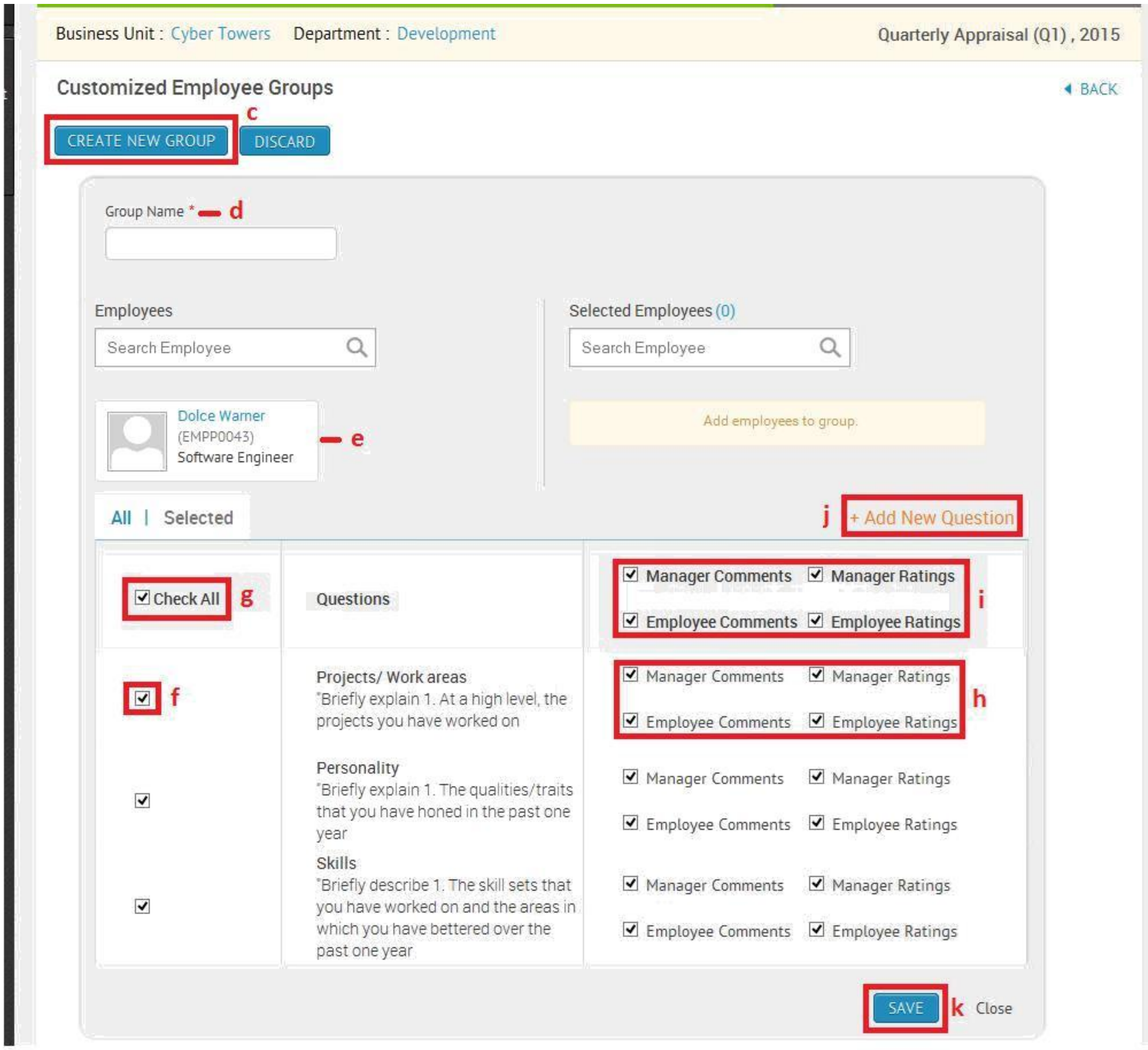


Figure 223

c. Click **CREATE NEW GROUP** button

d. Enter group name

e. Select Employees applicable for the appraisal process

f. Select questions individually

Or

g. Select all the questions by selecting **Check All**

h. Enable Manager/Employee Comments or Manager/Employee Ratings for a specific question. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.

Or

i. Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
j. Click **+Add New Question** option to add more questions to the appraisal process
k. Click **SAVE** button

Please refer Figure 224

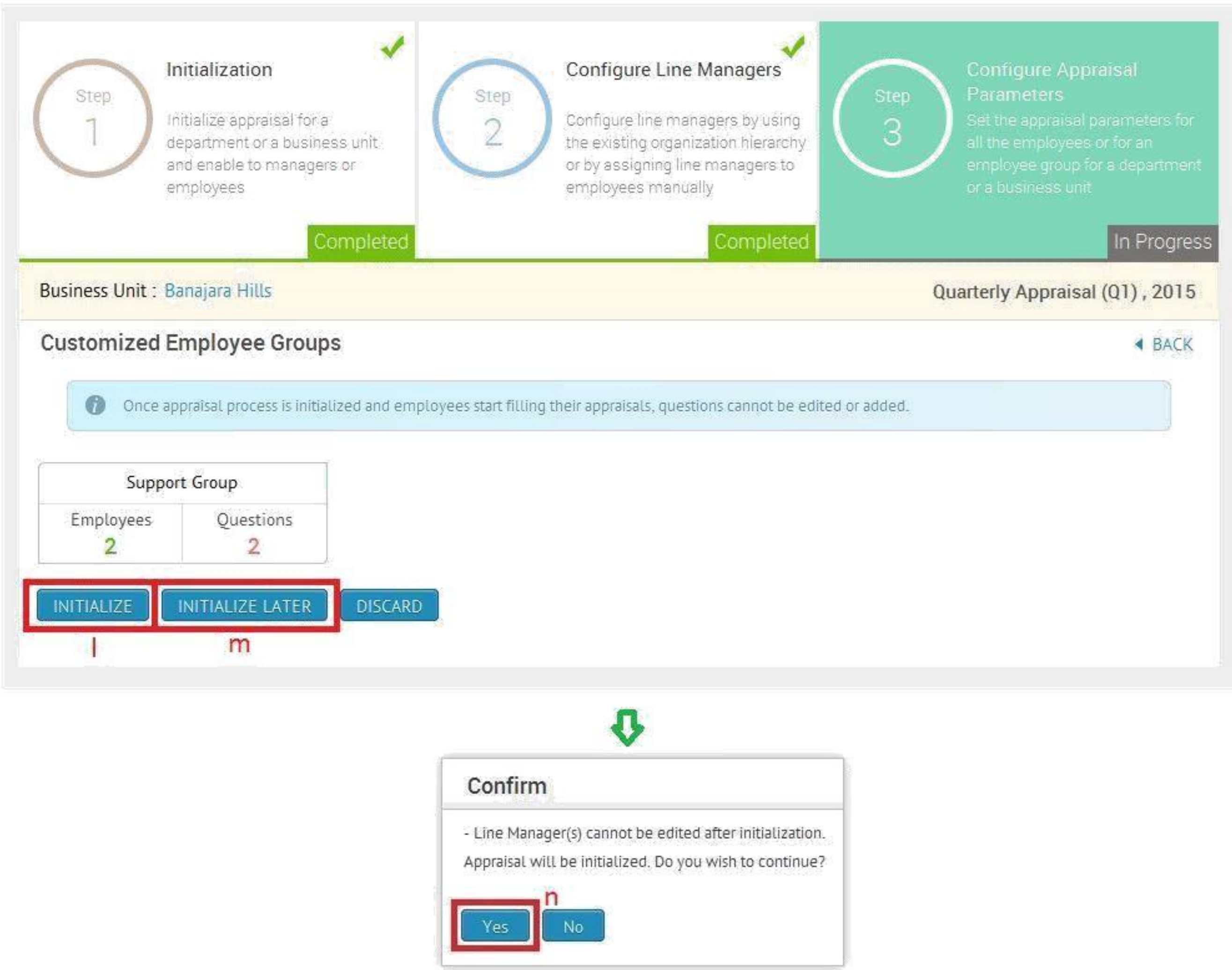


Figure 224

l. Upon saving the appraisal parameters, click **INITIALIZE** button to initialize the appraisal process
m. Click **INITIALIZE LATER** button to only save the appraisal process
n. Click **Yes** button in the confirmation box to initialize the appraisal

16.6 How do I undo/discard Line Manager Configuration?

You can discard the Line Managers' configuration after saving the appraisal process in **Step 2**.

Please refer Figure 224

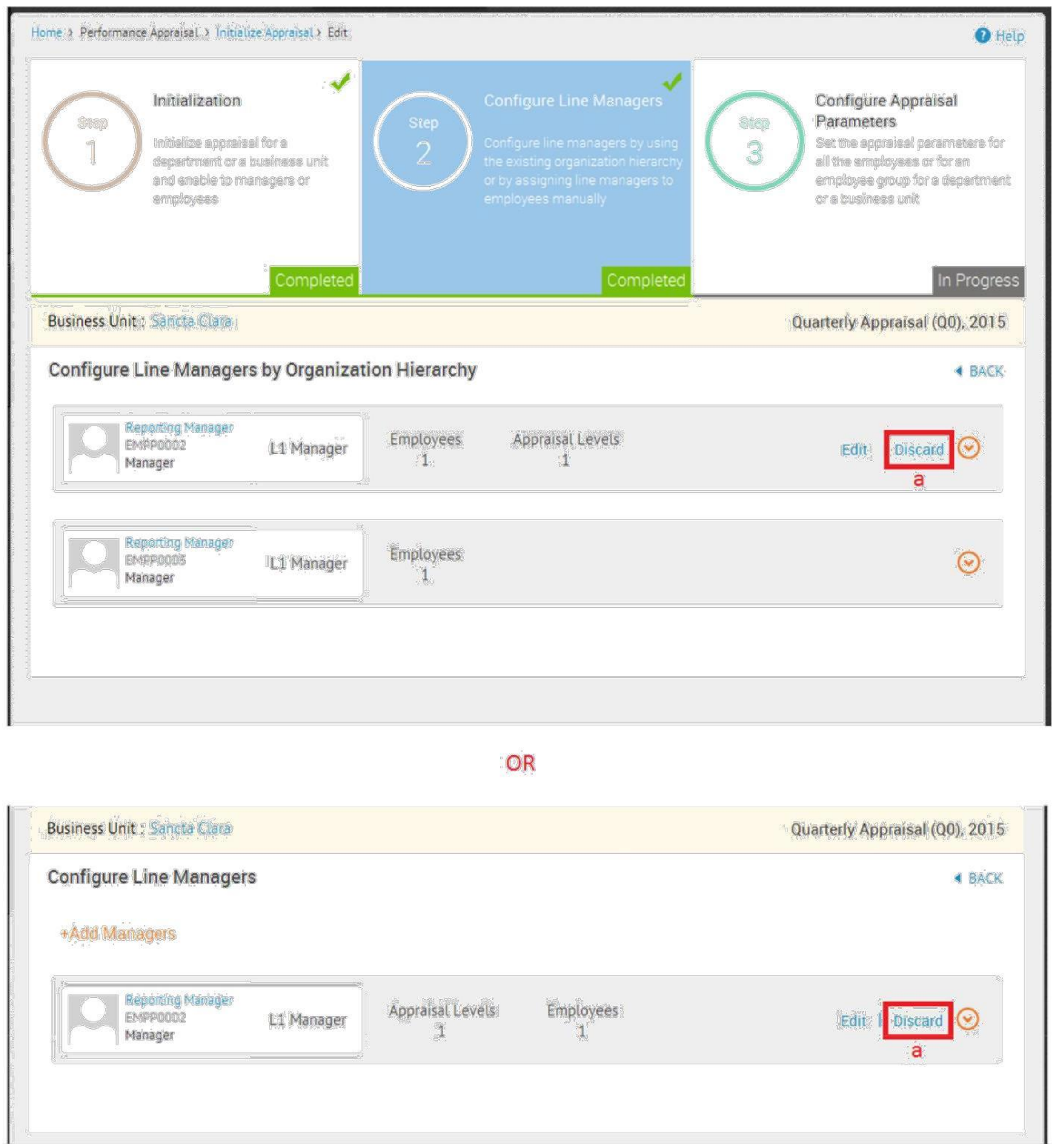


Figure 224

a. Click **Discard** option to remove the Line Manager configurations

16.7 How do I set additional appraisal questions as a Manager?

In the first step of Initialize appraisal, if the appraisal is enabled to the Managers, then Managers can set questions in addition to the ones initially added by the HR/Management. Once the parameters are set, Managers can create Employee groups and apply the appraisal parameters to the group.

Please refer Figure 225

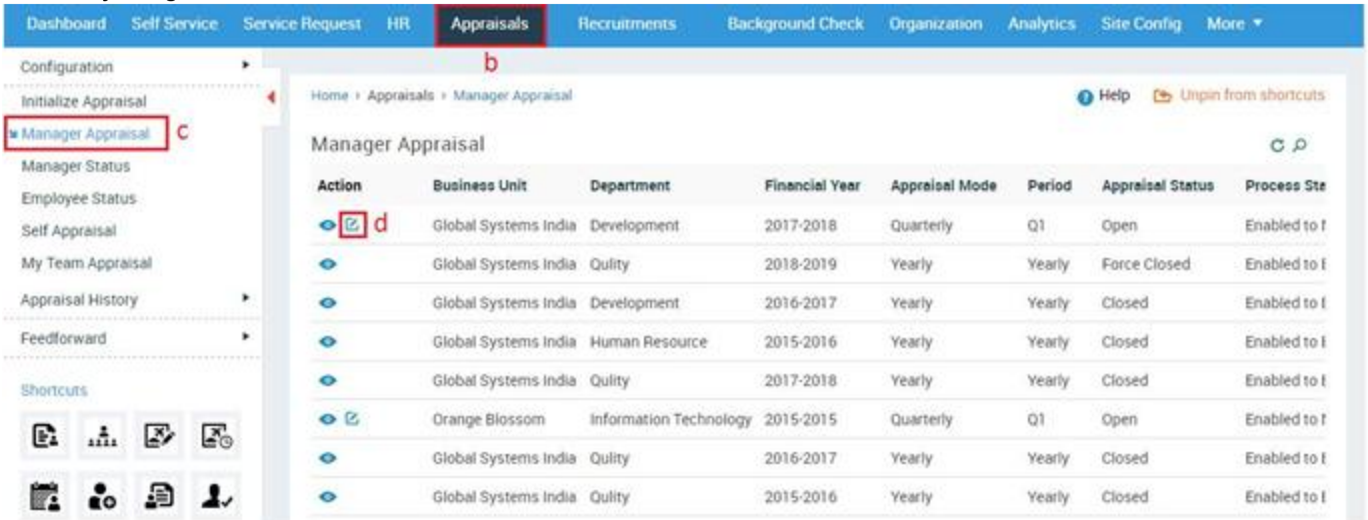


Figure 225

a. Login as a Manager
b. Click **Appraisals** in the top menu
c. Click **Manager Appraisal** on the left menu panel
d. Click **Edit** icon against an appraisal process

Please refer Figure 226

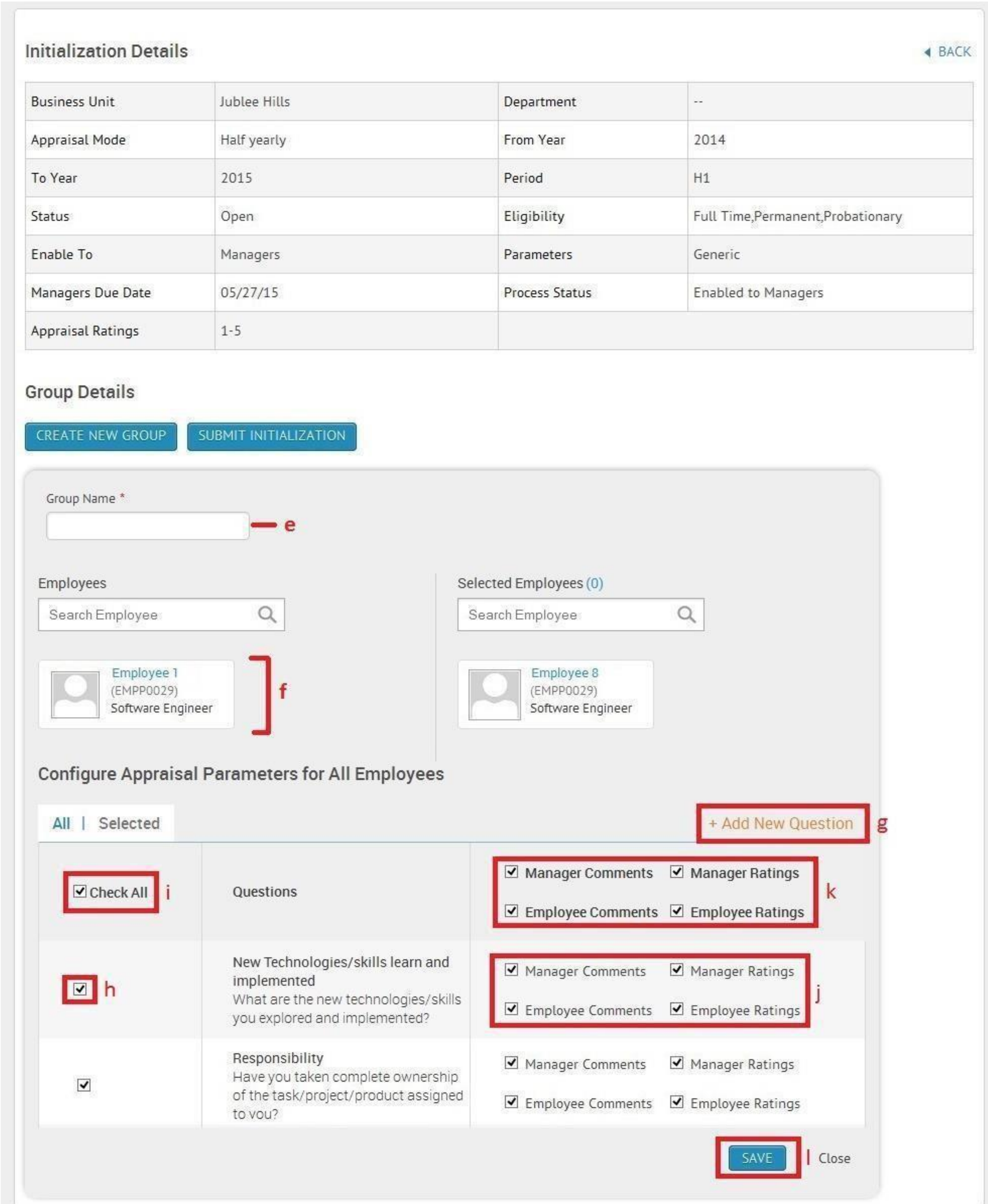


Figure 226

e. Create new group (E.g., Support, Testing, Development, etc.)
f. Add Employees to the group by clicking on an Employee
g. Click **Add New Question** option to add questions for a particular group of Employees
h. Select Questions individually

Or

i. Select all the questions by selecting **Check All**
j. Enable Manager/Employee Comments or Manager/Employee Ratings for a specific question. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.

Or

k. Select Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
l. Click **SAVE** button

Upon saving appraisal details, the Manager must **SUBMIT** the appraisal process for initialization.

16.8 How do I enable the appraisal to Employees?

You can update the appraisal process by changing the process status from "Enable to Managers" to "Enable to Employees" and providing Employee Due Date.

Please refer Figure 227

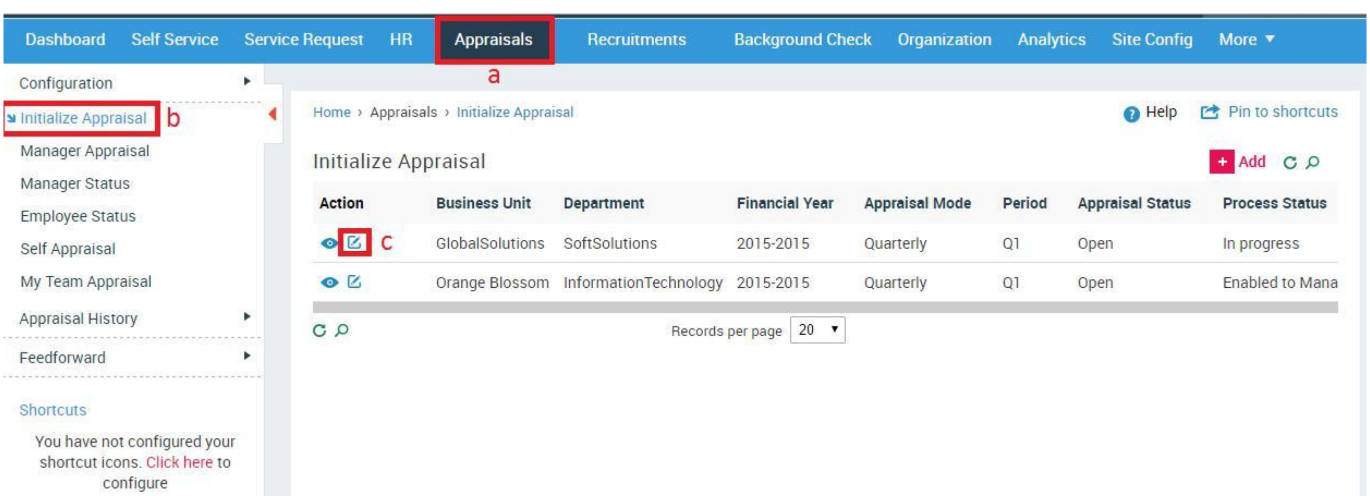


Figure 227

a. Click **Appraisals** in the top menu
b. Click **Initialize Appraisal** on the left menu panel
c. Click **Edit** icon against an appraisal process

Please refer Figure 228

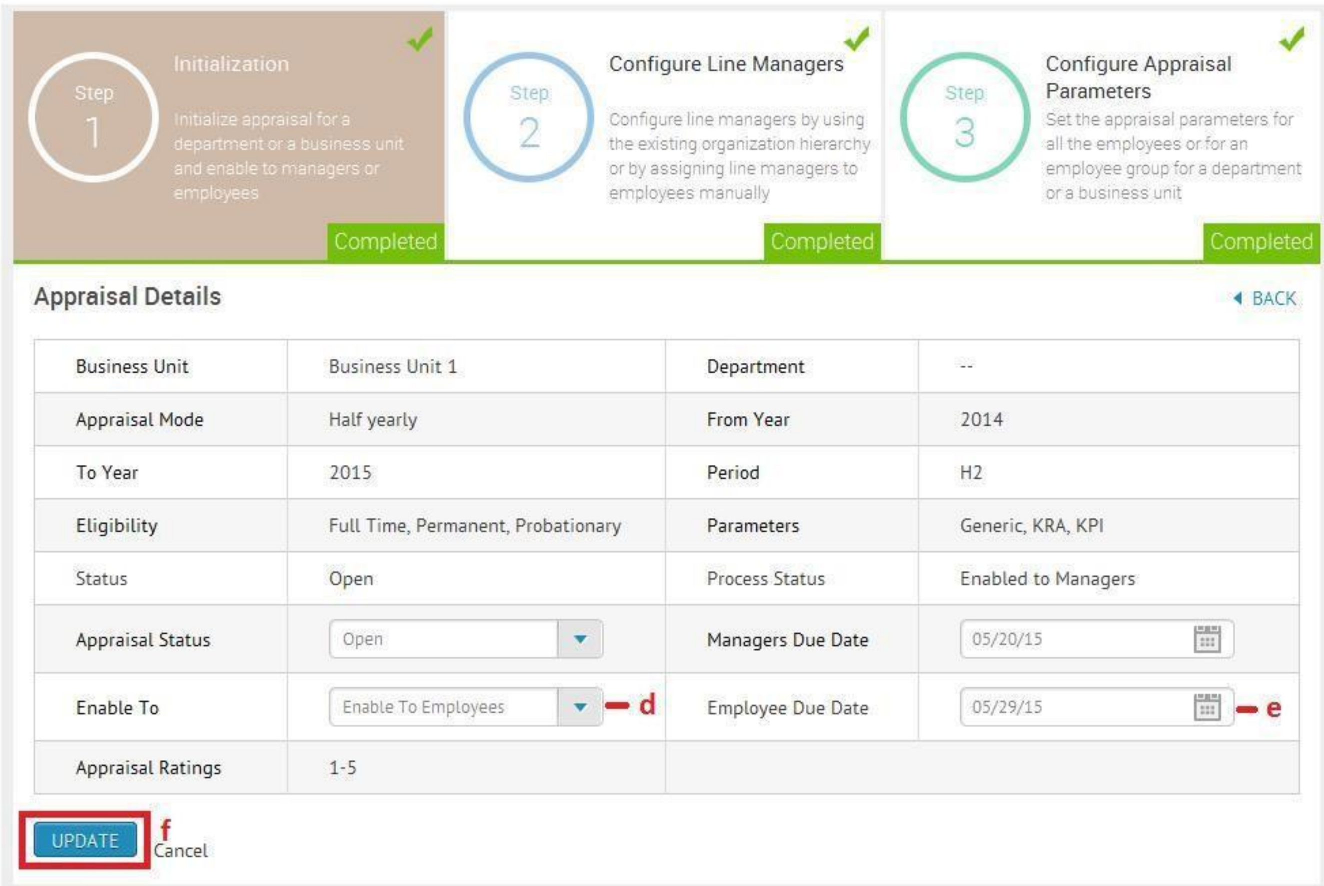


Figure 229

d. Select **'Enable to Employees'** in the Enable To dropdown
e. Select a date as the Employee Due Date
f. Click **UPDATE** button to enable the appraisal process to Employees

16.9 How do I view a Manager's Status?

You (Management/HR) can view the Manager's appraisal status.

Please refer Figure 230

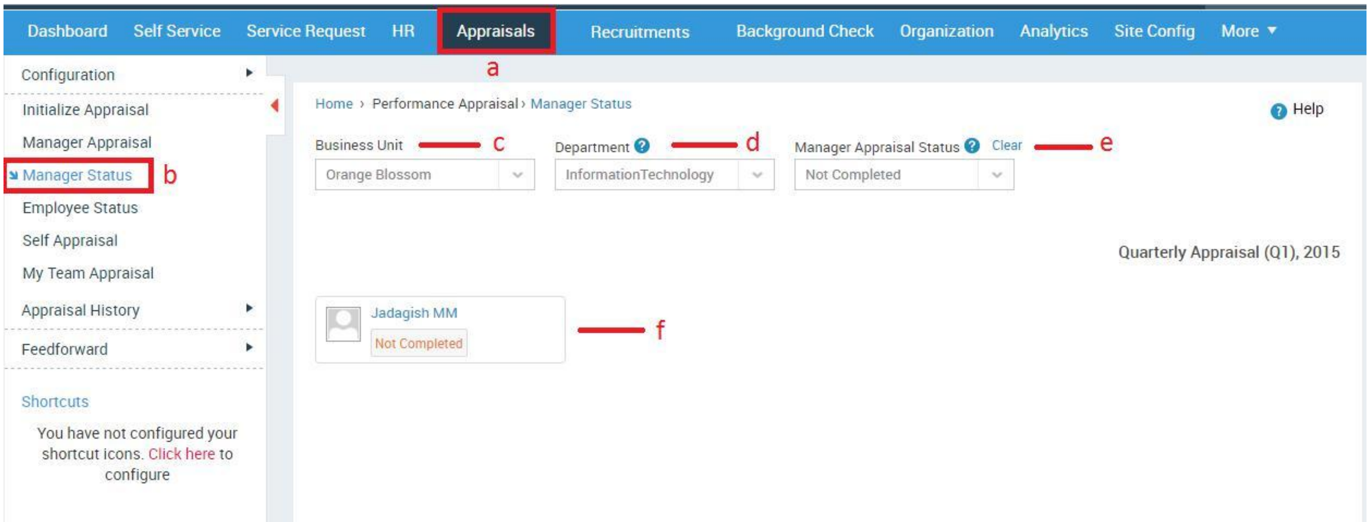


Figure 230

a. Click **Appraisals** in the top menu
b. Click **Manager Status** on the left menu panel
c. Select the Business Unit
d. Select the Department
e. Select the Manager Appraisal Status if required
f. Managers and their status will be displayed

16.10 How do I provide Self Appraisal?

You can provide self-appraisal details such as ratings and comments. Upon completion of self-appraisal, your appraisal details will be visible to your line Managers for further ratings and comments.

Please refer Figure 231

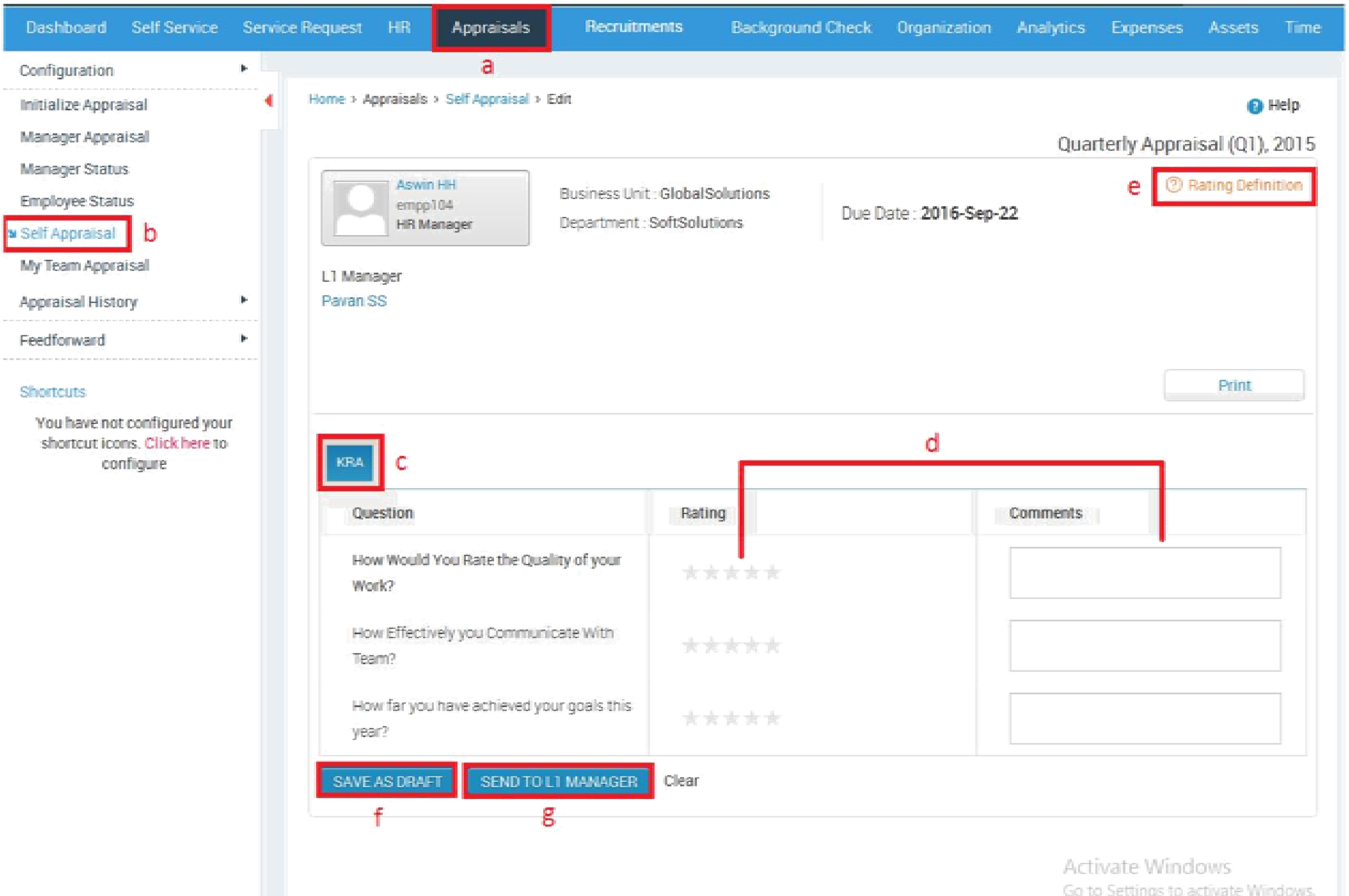


Figure 231

a. Click **Appraisals** in the top menu
b. Click **Self-Appraisal** on the left menu panel
c. The parameters are displayed above the questions grid
d. Provide rating and comments for every question
e. Click **Rating Definition** option to view the text for each rating
f. Click **SEND TO L1 MANAGER** button to send the self-appraisal details it to L1 Manager
g. Click **SAVE AS DRAFT** button to only save the appraisal process

16.11 How do I provide appraisal ratings and comments for an Employee?

You (L1 Manager) will be able to view your team Employees' appraisal status. Once the Employees complete their appraisal process, you will be able to provide ratings and comments to the Employees. Based on the levels of appraisal, the Employee appraisal process will be enabled to the Line Managers.

Please refer Figure 232

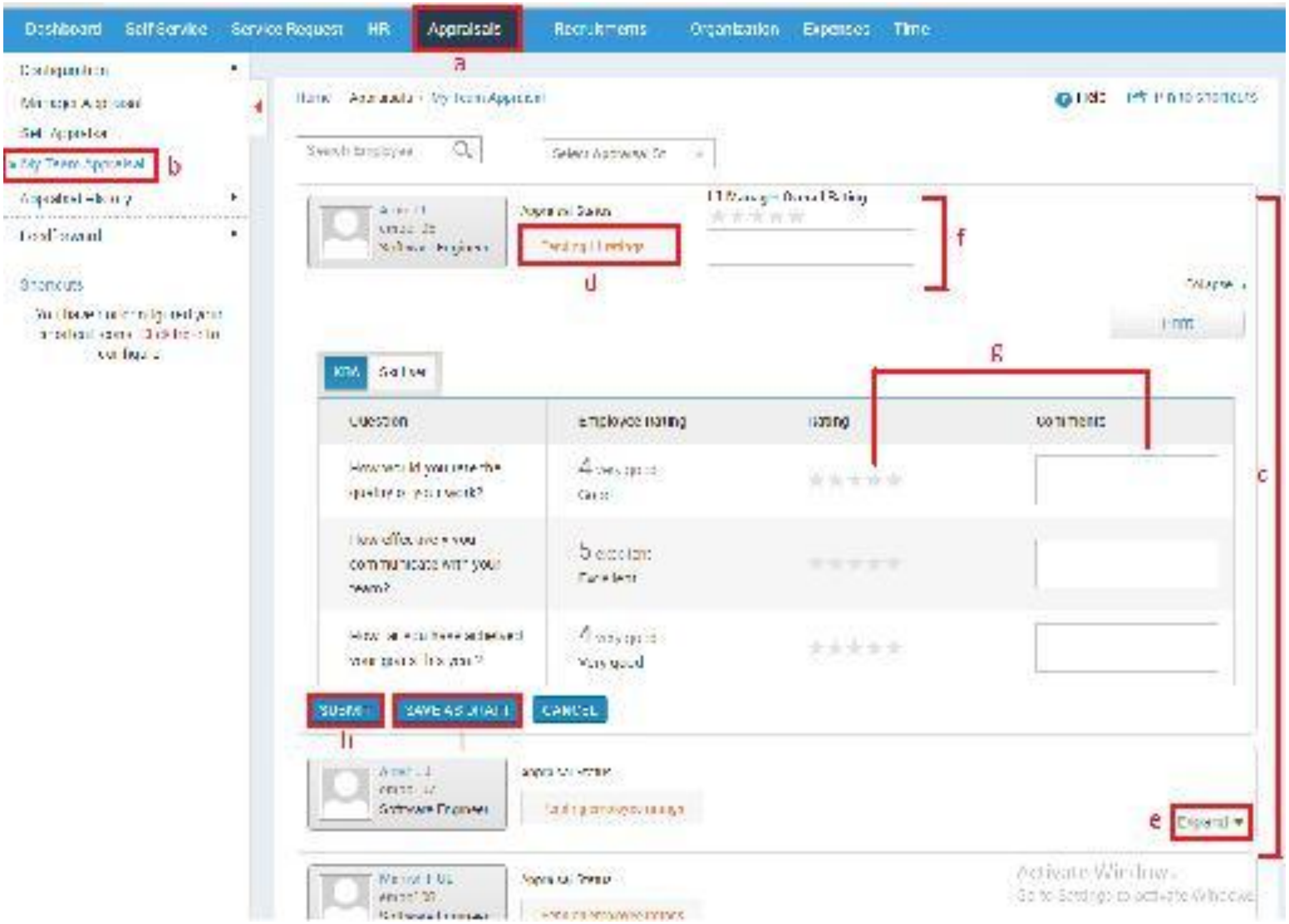


Figure 232

a. Click **Appraisals** in the top menu
b. Click **My Team Appraisal** on the left menu panel
c. All the Employees in the Manager's team will be displayed
d. The status of each Employee's appraisal is displayed
e. Click **Expand** option to provide Manager's rating
f. Provide overall rating and comment for an Employee
g. Provide the rating and comments for each question
h. Click **SUBMIT** button
i. Click **SAVE AS DRAFT** button to save the ratings and comments without submitting. This option will allow you to make changes to your ratings and comments later.

16.12 How do I check Employee Status?

You (Management/HR) can view the Employees’ appraisal status.

Please refer Figure 233

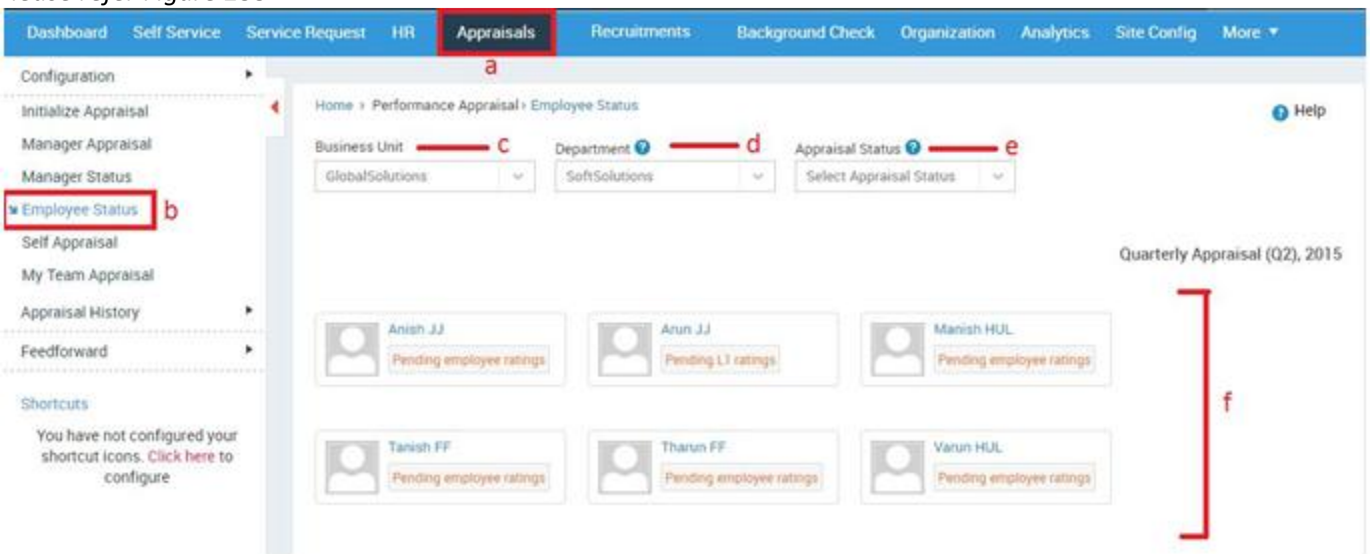


Figure 233

a. Click **Appraisals** in the top menu
b. Click **Employee Status** on the left menu panel
c. Select the Business Unit
d. Select the Department
e. Select Appraisal Status if required
f. Employees and their appraisal statuses will be displayed

16.13 What is Feedforward?

Feedforward is the feedback given by the Employees to appraise their respective Line Managers. All the configurations are done on the Management level. Only the Management can view the feedback given by the Employees about their Managers.

16.14 How do I add Questions for Feedforward?

Questions are added by the Management to evaluate Managers' performance.

Please refer Figure 234

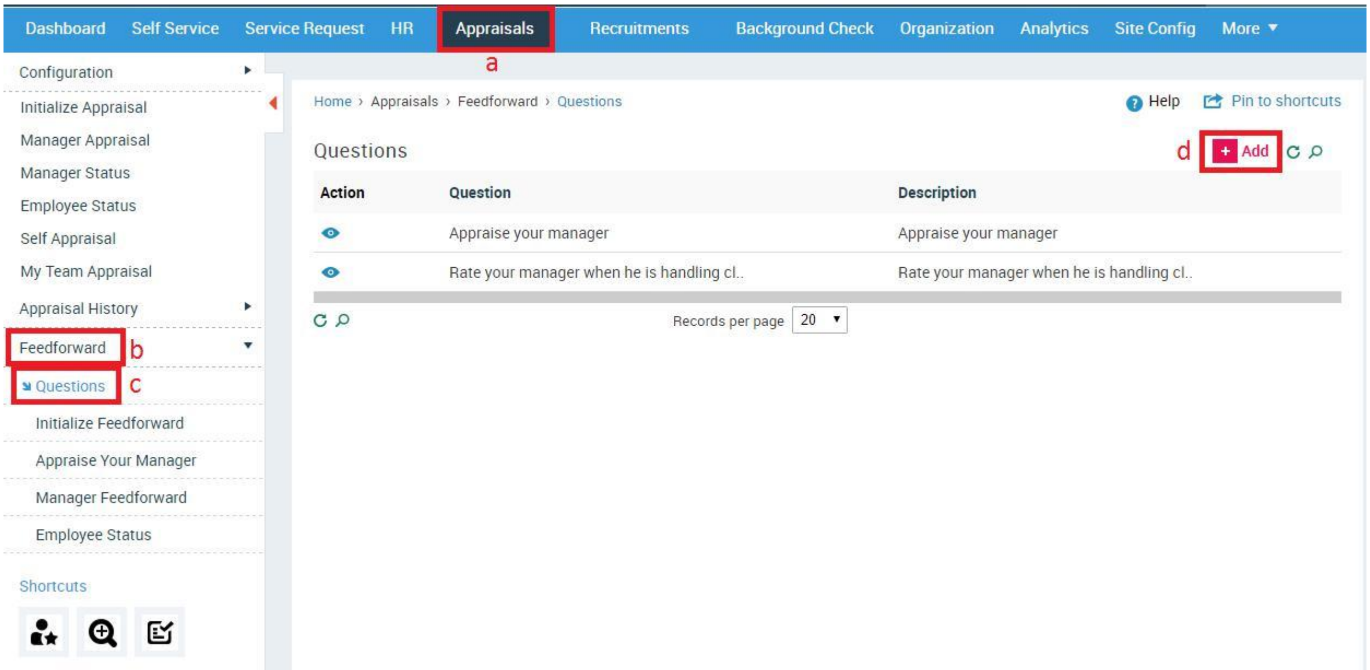


Figure 234

a. Click **Appraisals** in the top menu
b. Click **Feedforward** on the left menu panel
c. Click **Questions** in the submenu
d. Click **+Add** button

Please refer Figure 235

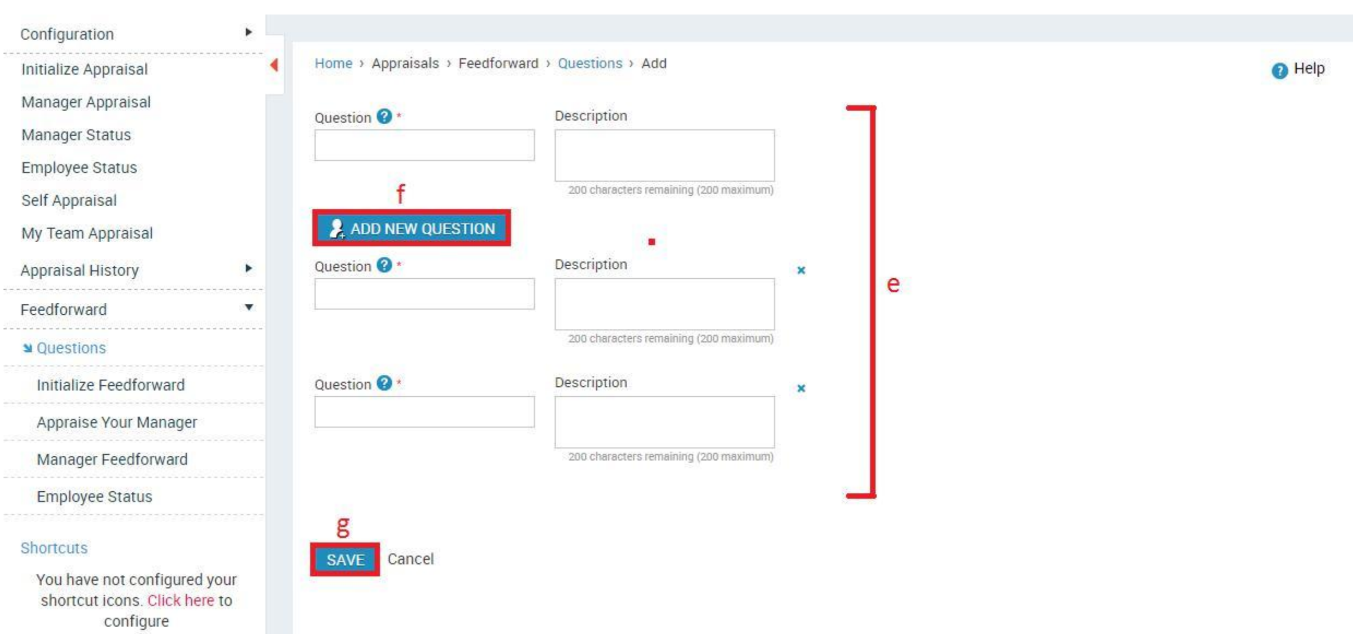


Figure 235

e. Add the question and description if required
f. Click **ADD NEW QUESTION** button to add more questions
g. Click **SAVE** button

16.15 How do I initialize Feedforward?

- In the initialize feed forward page, only the appraisals which have 'Closed' status are displayed.
- **Employee Details**: Here, the Management will determine if the management can view only the feedback given by the Employees or the feedback along with the Employee names.
  - **Show**: Employee names and their feedbacks will be displayed
  - **Hide**: Only the feedback information will be displayed.
- **Enable to**: The Management will determine if all Employees can appraise their Managers or only the Employees eligible for appraisal
  - **Appraisal Employees**: All the Employees eligible for appraisal process can appraise their Managers
  - **All Employees**: All the Employees in the organization can appraise their Managers
- **Due Date**: The due date is for closing the Feed Forward process for Employees
- **Configure Questions**: All the questions added by the Management will be displayed. If more questions are to be added, **Add New Question** option is also provided.

Please refer Figure 236

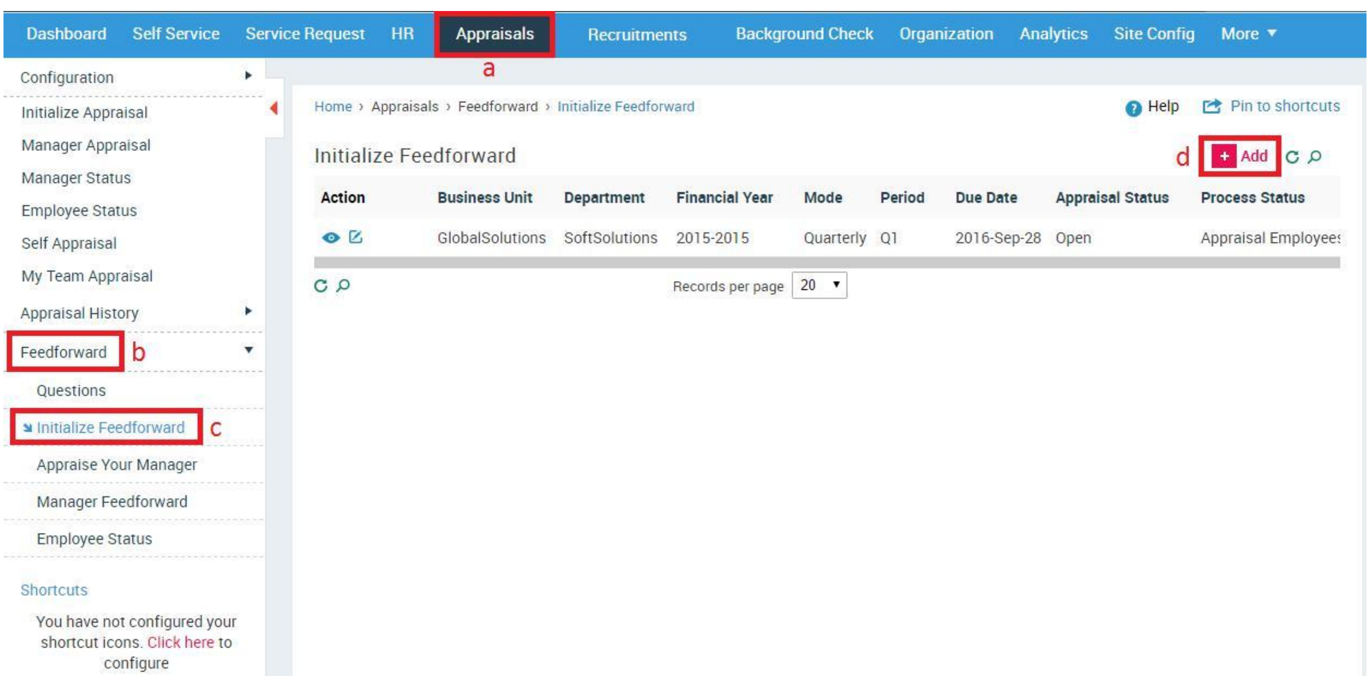


Figure 236

a. Click **Appraisals** in the top menu
b. Click **Feedforward** on the left menu panel
c. Click **Initialize Feedforward** in the submenu
d. Click **+Add** button

Please refer Figure 237

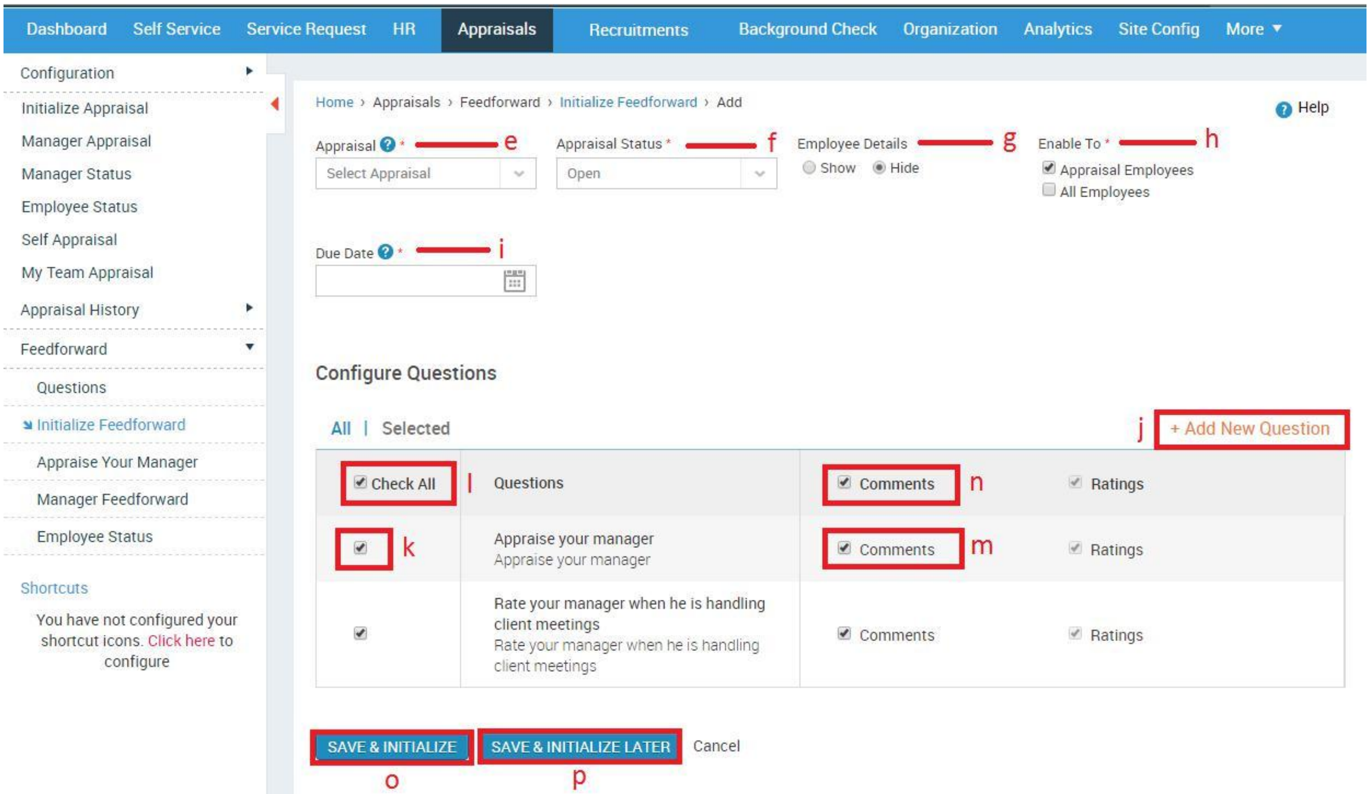


Figure 237

e. Select an appraisal process from the Appraisal dropdown
f. The Status will be to 'Open' by default
g. Select whether you want to view the Employee details along with their feedback ratings and comments or have the Employee details hidden
h. Enable Feedforward to all Employees or only to Employees who are eligible for Appraisal process
i. Select a due date for Employees to provide their feedback
j. Click **Add New Question** to add new questions for Feedforward
k. Select Questions individually

Or

l. Select all the questions
m. Select comments individually for all the questions

Or

n. Select comments for all questions
o. Click **SAVE & INITIALIZE** button to initialize the Feed Forward process
p. Click on **SAVE & INITIALIZE LATER** button to only save the Feed Forward process

16.16 How do I Appraise my Manager?

You will be able to view the questions defined to appraise your Line Managers. You can provide ratings and comments for each question and submit the feedforward.

Please refer Figure 238

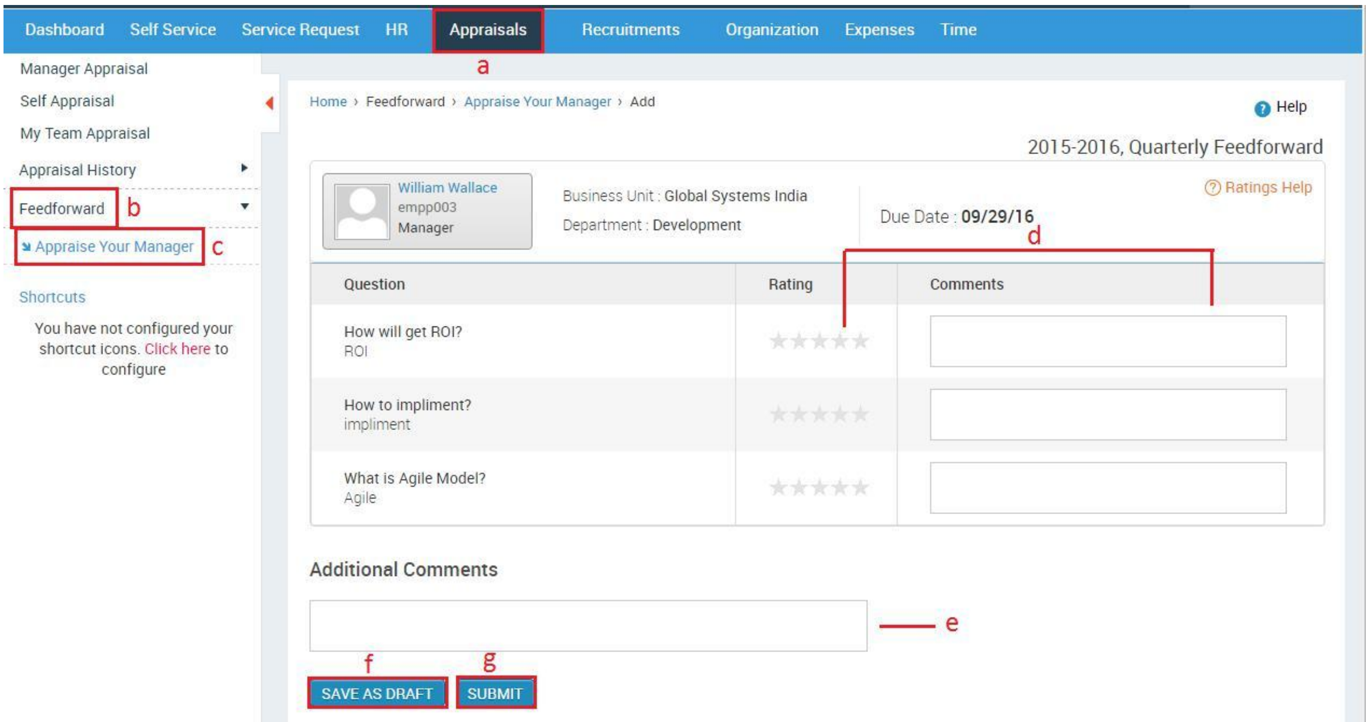


Figure 238

a. Click **Appraisals** in the top menu
b. Click **Feedforward** on the left menu panel
c. Click **Appraise Your Manager** in the submenu
d. Provide ratings and comments
e. Enter additional comments (not mandatory)
f. Click **SAVE AS DRAFT** button to make changes later
g. Click **SUBMIT** button

16.17 How do I view Managers' Feedforward details?

You (Management) will be able to view Managers feedforward details. Upon selection of appraisal from the dropdown, feed forward details along with the Manager ratings are displayed. The average ratings of all the Employees will be highlighted. A detailed description of comments and ratings of Employees are displayed by question or by Employee.

Please refer Figure 239

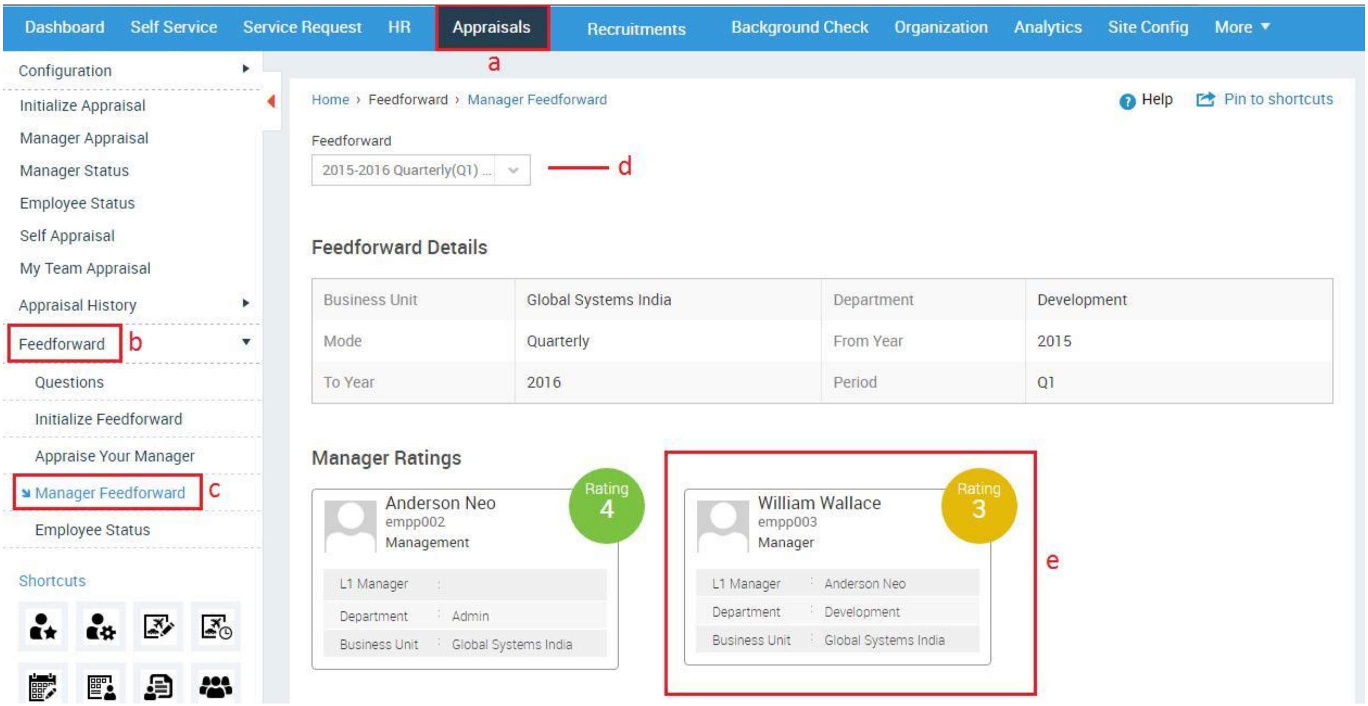


Figure 239

a. Click **Appraisals** in the top menu
b. Click **Feedforward** on the left menu panel
c. Click **Manager Feedforward** in the submenu
d. Select an appraisal process to view the Feedforward details
e. Click on individual Manager section to view the ratings and comments provided by Employees

Please refer Figure 240

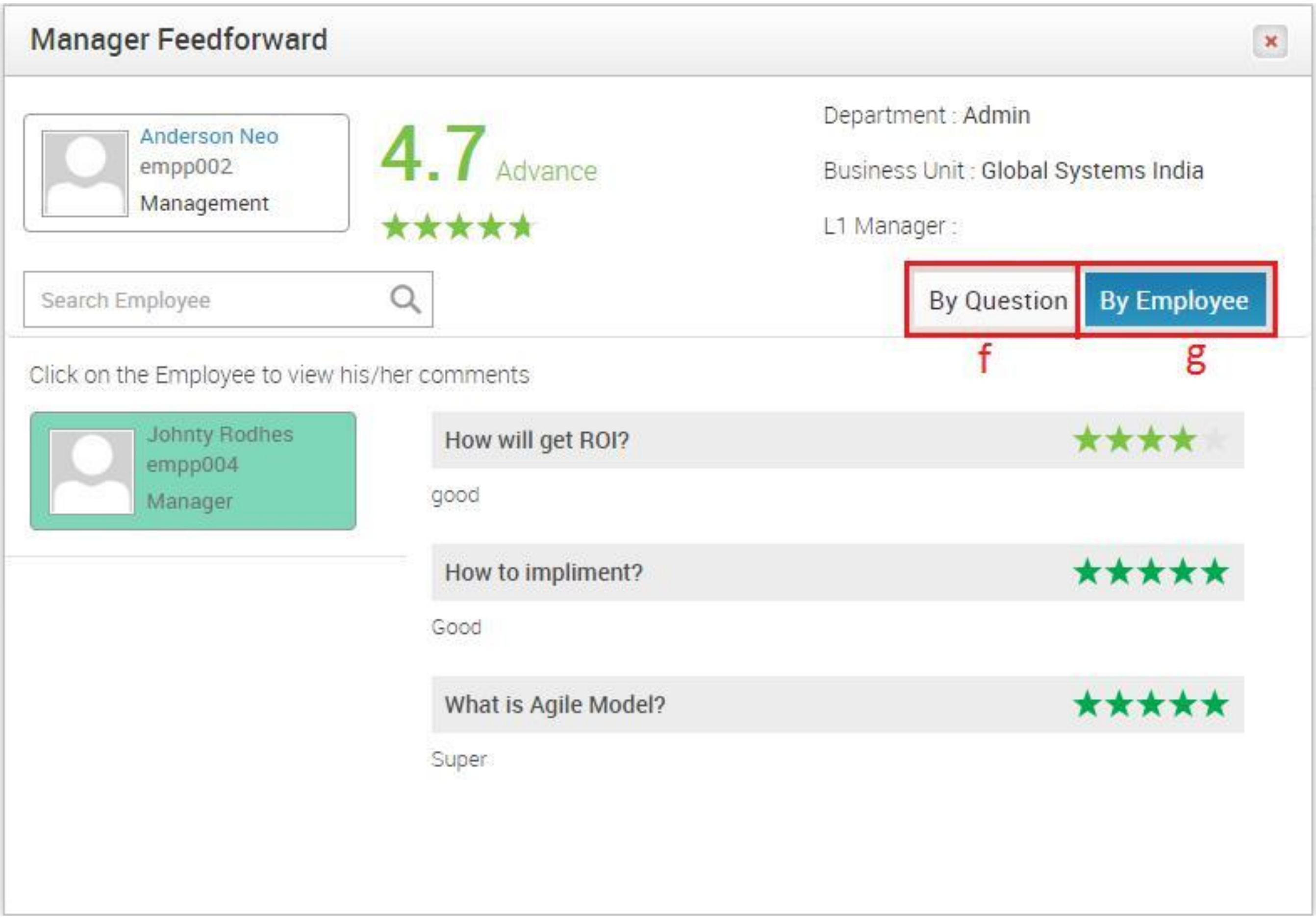


Figure 240

*The below options will only be available if you have selected **'Show'** for the option **Employee Details** during feedforward initialization.*

f. Select 'By Questions' to view the ratings and comments based on questions
g. Select 'By Employee' to view the ratings and comments of each Employee

16.18 How do I view Employee Feedforward Status?

You (Management) will be able to view the feed forward status of all Employees.

Please refer Figure 241

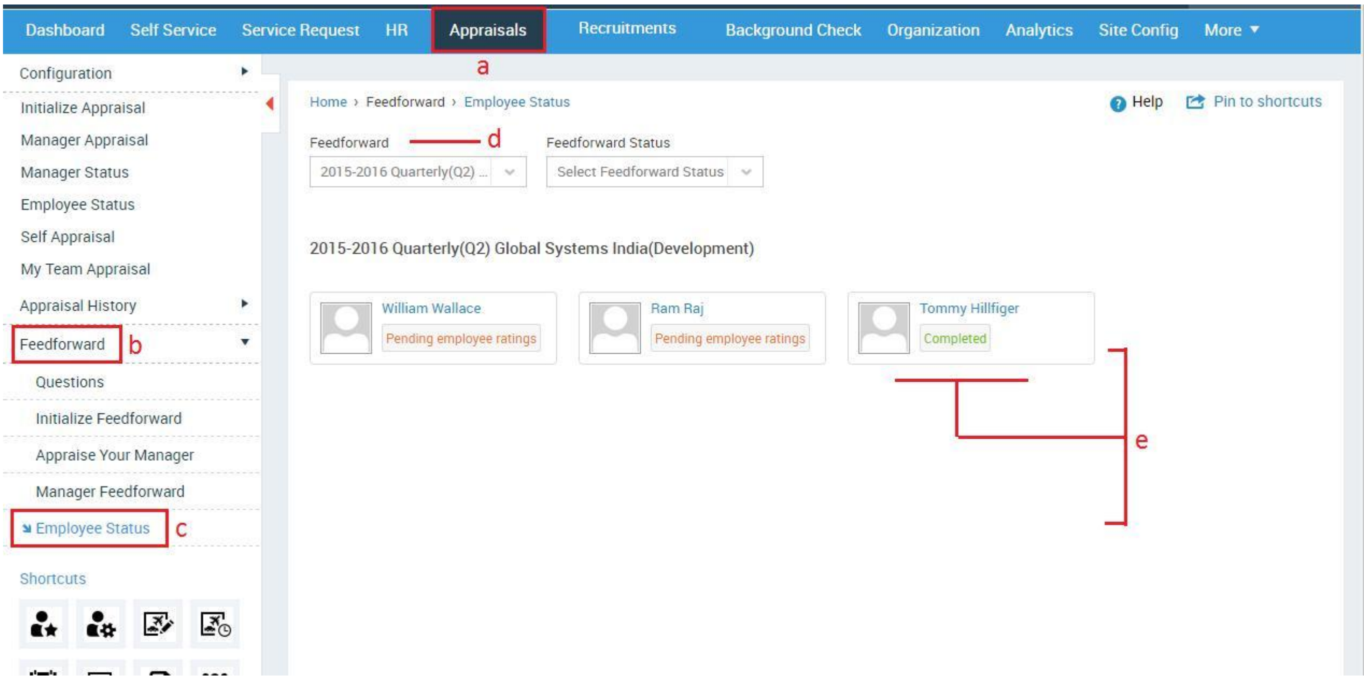


Figure 241

a. Click **Appraisals** in the top menu
b. Click **Feedforward** on the left menu panel
c. Click **Employee Status** in the submenu
d. Select a process to view Feedforward details in the dropdown
e. The Employees of the selected process along with their Feed Forward status will be displayed

16.19 How do I view my Appraisal History?

Please refer Figure 242

Figure 242

a. Click **Appraisals** in the top menu
b. Click **Appraisal History** on the left menu panel
c. Click **My Appraisal History** in the submenu

d. Click **View** icon

Please refer Figure 243

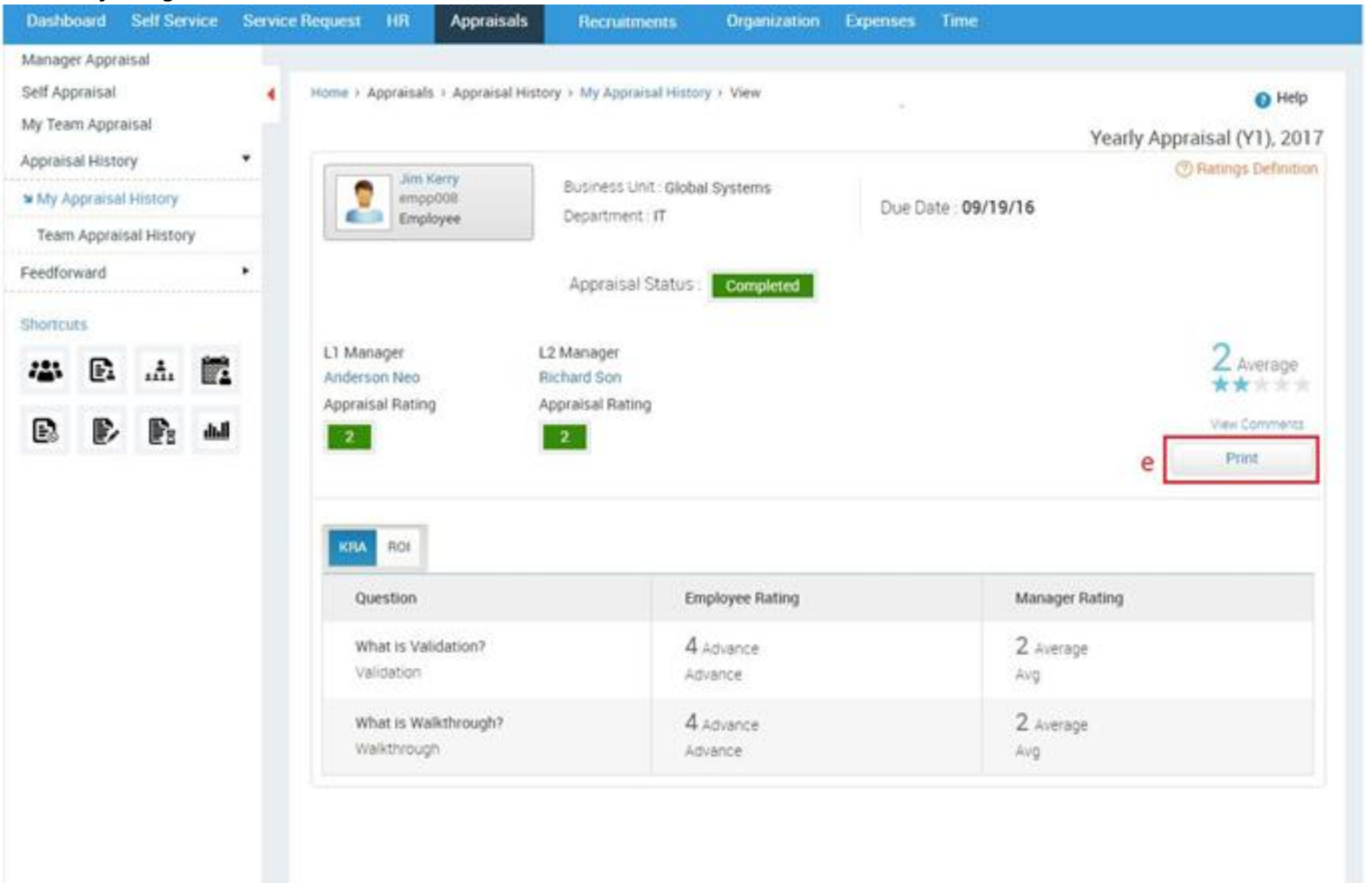


Figure 243

You can view your closed appraisal details here.

e. Click **Print** button to print your appraisal details

16.20 How do I view my team's Appraisal History?

Please refer Figure 244

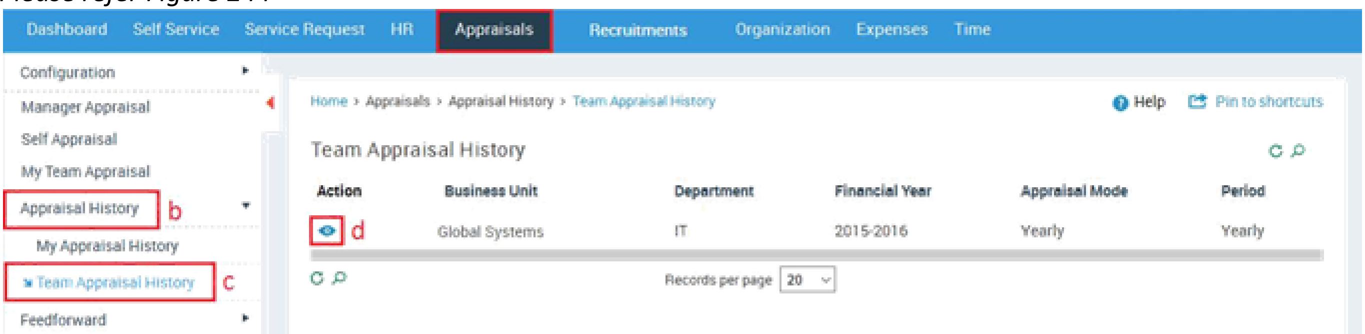


Figure 244

a. Click **Appraisals** in the top menu
b. Click **Appraisal History** on the left menu panel
c. Click **Team Appraisal History** in the submenu
d. Click **View** icon

Please refer Figure 245

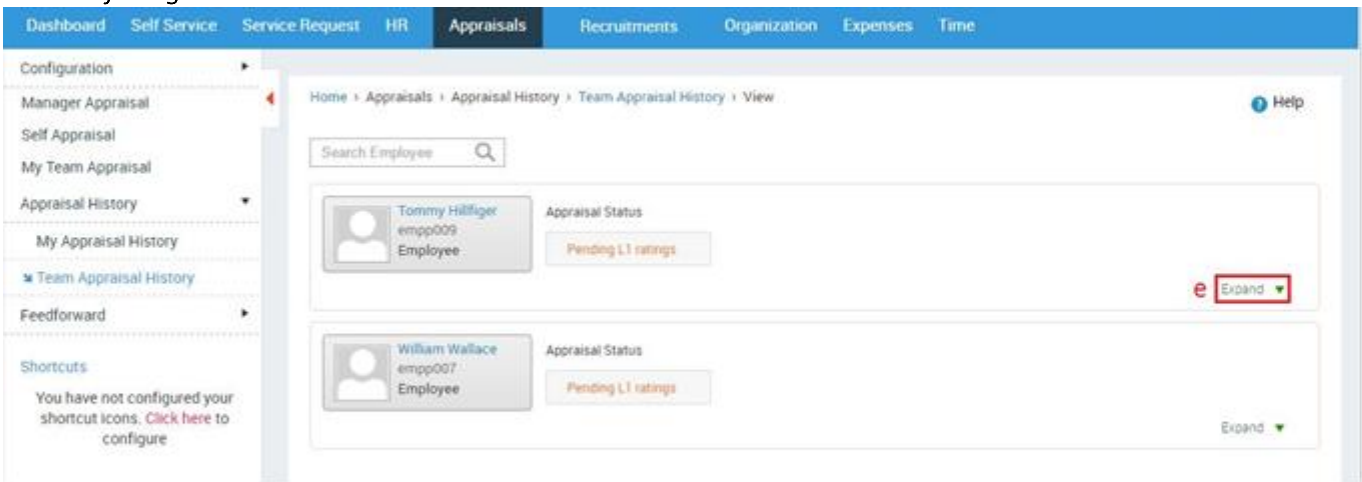


Figure 245

e. Click **Expand** for any employee to view more details

Please refer Figure 246

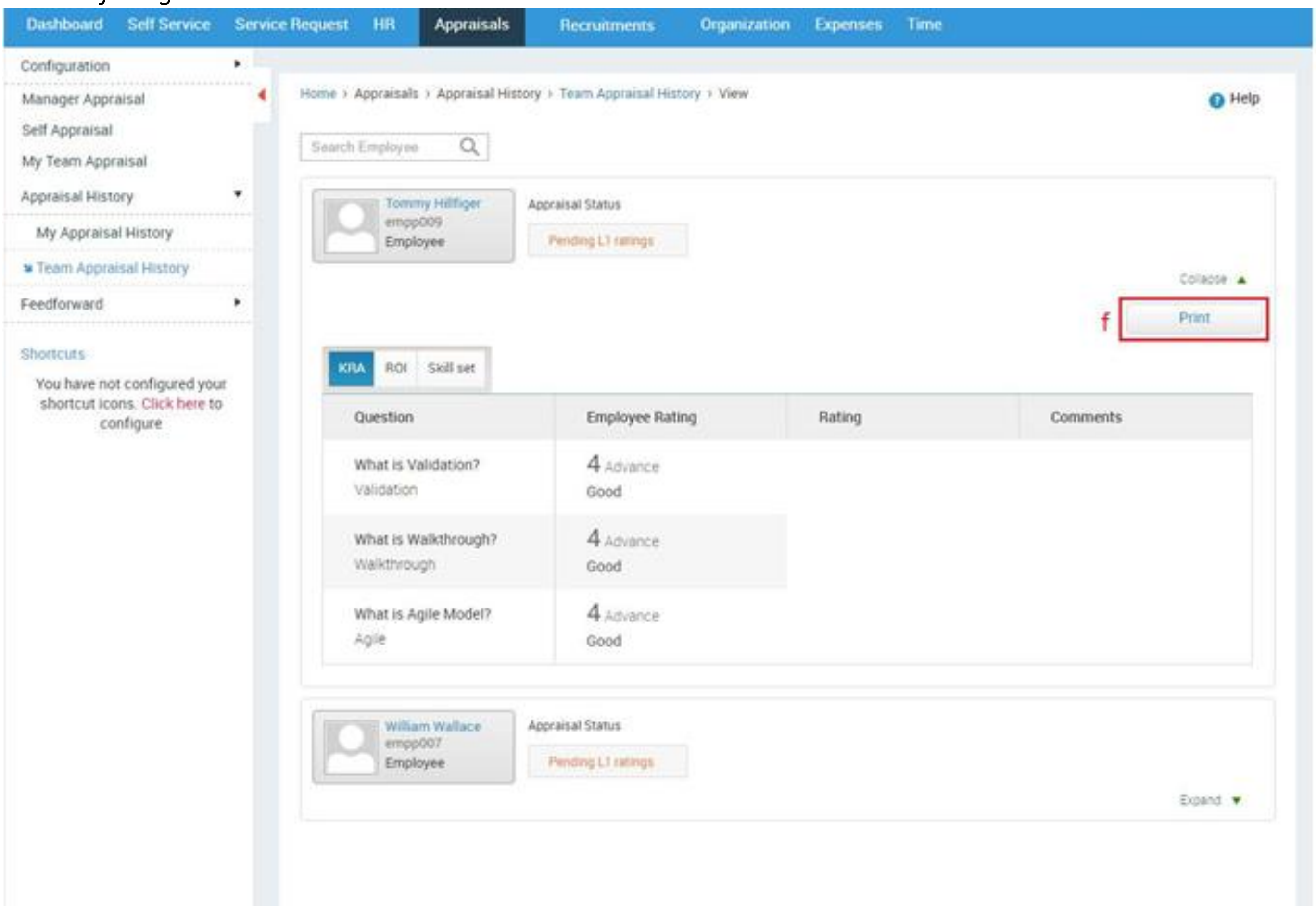
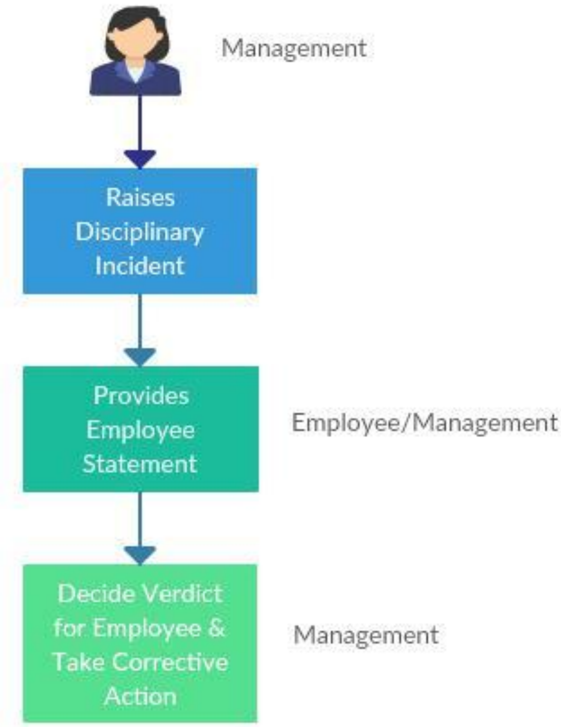


Figure 246

f. Click **Print** to print your employee’s closed appraisal form

17. Disciplinary Incident Management

This module will enable users to follow a streamlined approach for disciplinary incident management process. Employers can raise disciplinary incident(s) against employees (defaulters) in the organization. The employees (defaulters) are given an opportunity to make an appeal by providing their statement. On the basis of the employee's (defaulter) statement and misdemeanour evidence, he/she can be pronounced guilty/no guilty. If found guilty, a corrective action can be taken.



Process Description:

- User (Management) raises a disciplinary incident against an employee
- Employee can provide his/her appeal statement
- If the employee does not provide his/her appeal statement within the expiry date, then he/she will not be able to provide the appeal statement. In that case the User (Management) can provide the statement on behalf of the employee
- The User (Management) will then decide the verdict for the employee (defaulter) and select a suitable corrective action

17.1 How do I create a Violation Type?

Only a Super Admin/Management can create a violation type.

Please refer Figure 247

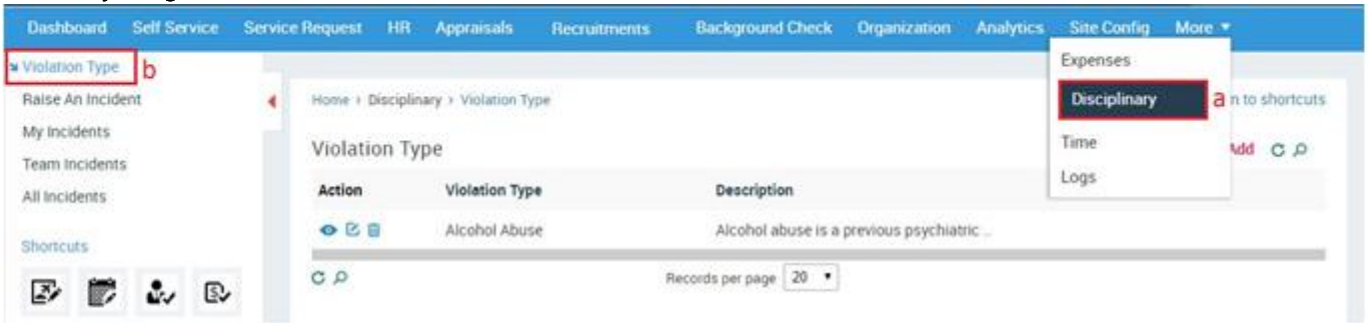


Figure 247

a. Click **Disciplinary** in the top menu
b. Click **Violation Type** on the left menu panel

Please refer Figure 248

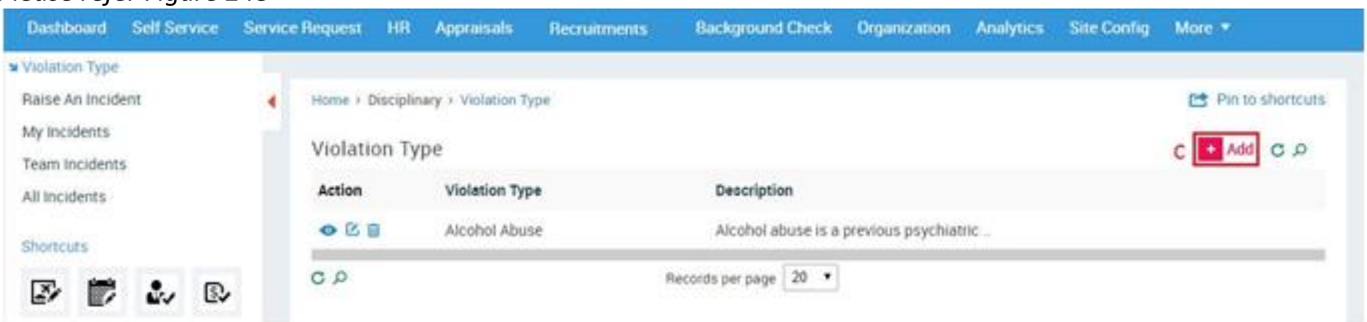


Figure 248

c. Click **+Add** button on the grid's top right corner

Please refer Figure 249

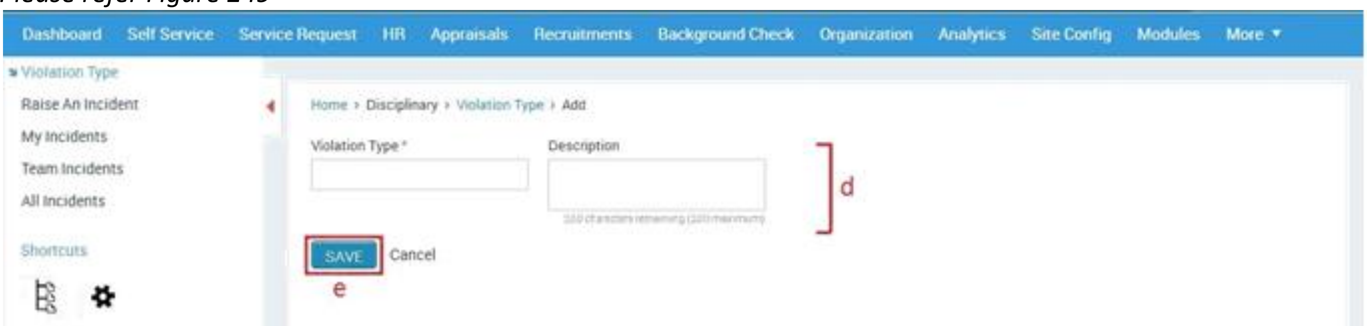


Figure 249

d. Enter 'Violation Type' name and its description
e. Click **SAVE** button

17.2 How do I raise a disciplinary incident?

Please refer Figure 250

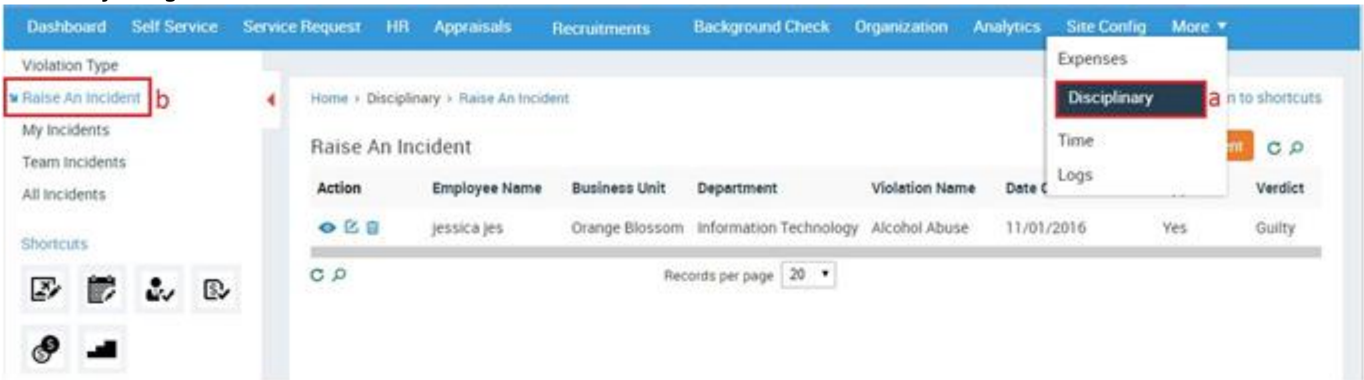


Figure 250

a. Click **Disciplinary** in the top menu
b. Click **Raise an Incident** on the left menu panel

Please refer Figure 251

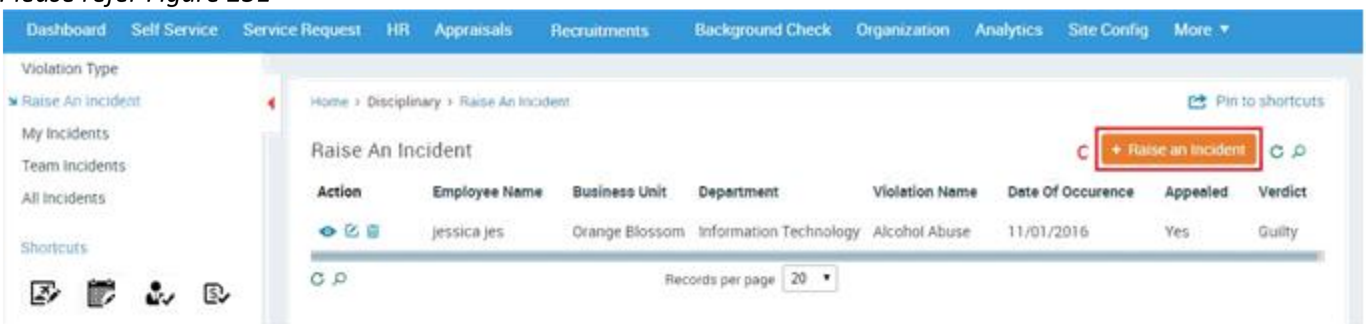


Figure 251

c. Click **Raise an incident** button on the grid's top right corner

Please refer Figure 252

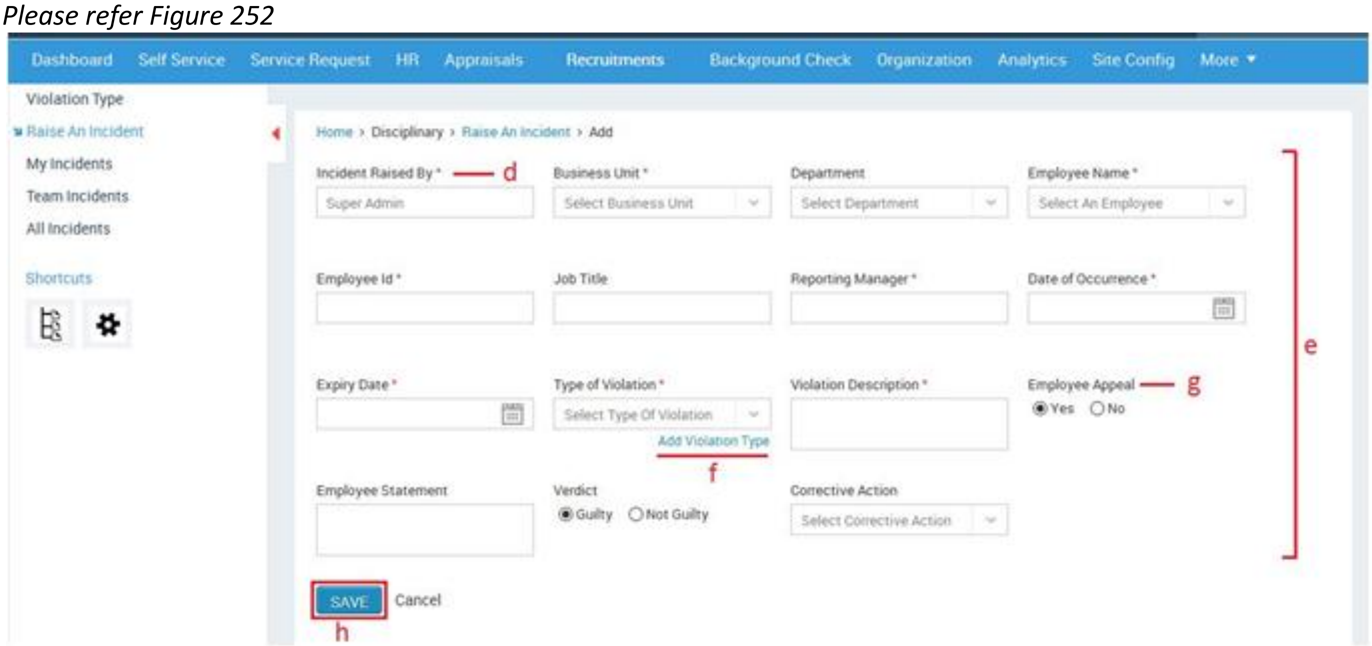


Figure 252

d. 'Incident Raised By' field will be auto populated
e. Enter the required details
f. Click **Add Violation Type** to add a new violation type
g. Choose **Yes** to allow an employee appeal and **No** to disallow an employee appeal
h. Click **SAVE** button

17.3 How do I view my disciplinary incidents?

Please refer Figure 253

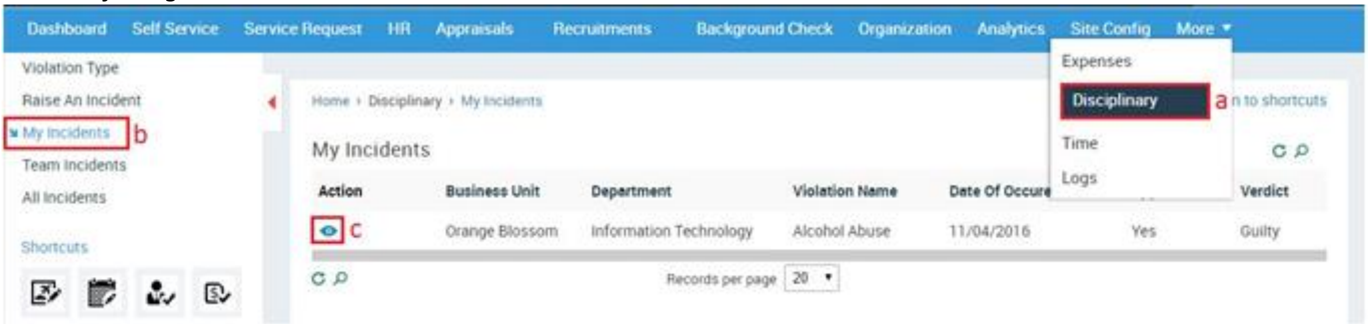


Figure 253

a. Click **Disciplinary** in the top menu
b. Click **My Incidents** on the left menu panel
c. Click **View** icon in the Action column

Please refer Figure 254

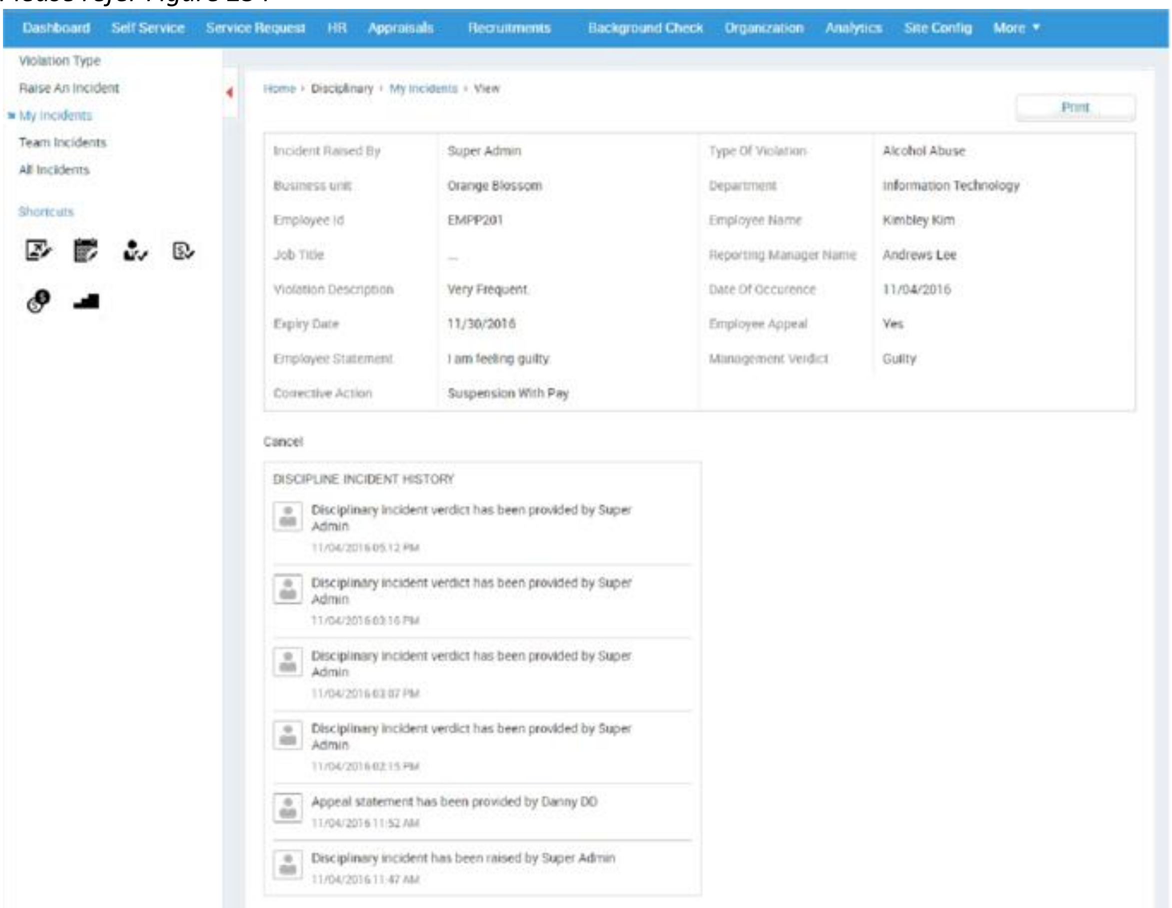


Figure 254

17.4 How do I view my team members' (employees) disciplinary incidents?

Please refer Figure 255

Figure 255

a. Click **Disciplinary** in the top menu
b. Click **Team Incidents** on the left menu panel
c. Click **View** icon in the Action column

Please refer Figure 256

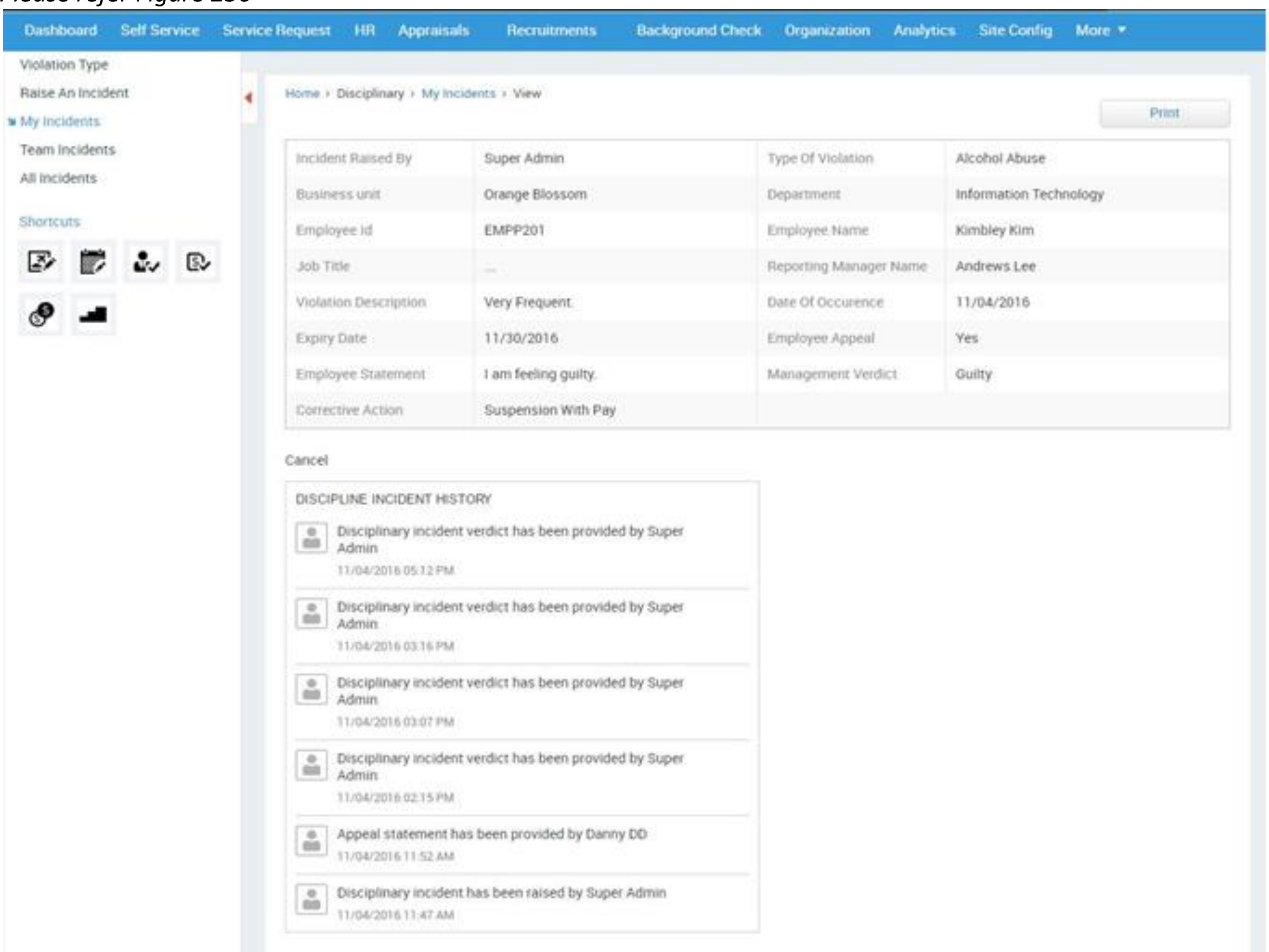


Figure 256

17.5 How do I provide my appeal statement?

Please refer Figure 257

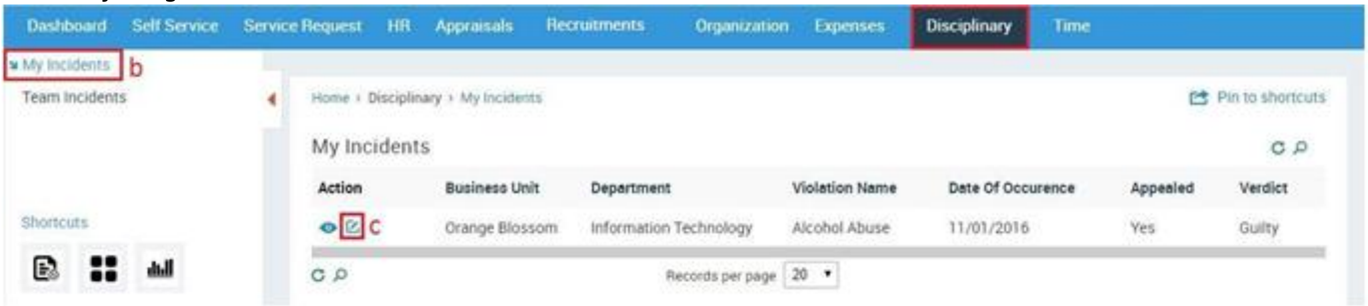


Figure 257

a. Click **Disciplinary** in the top menu
b. Click **My Incidents** on the left menu panel
c. Click **edit** icon in the Action column

Please refer Figure 258

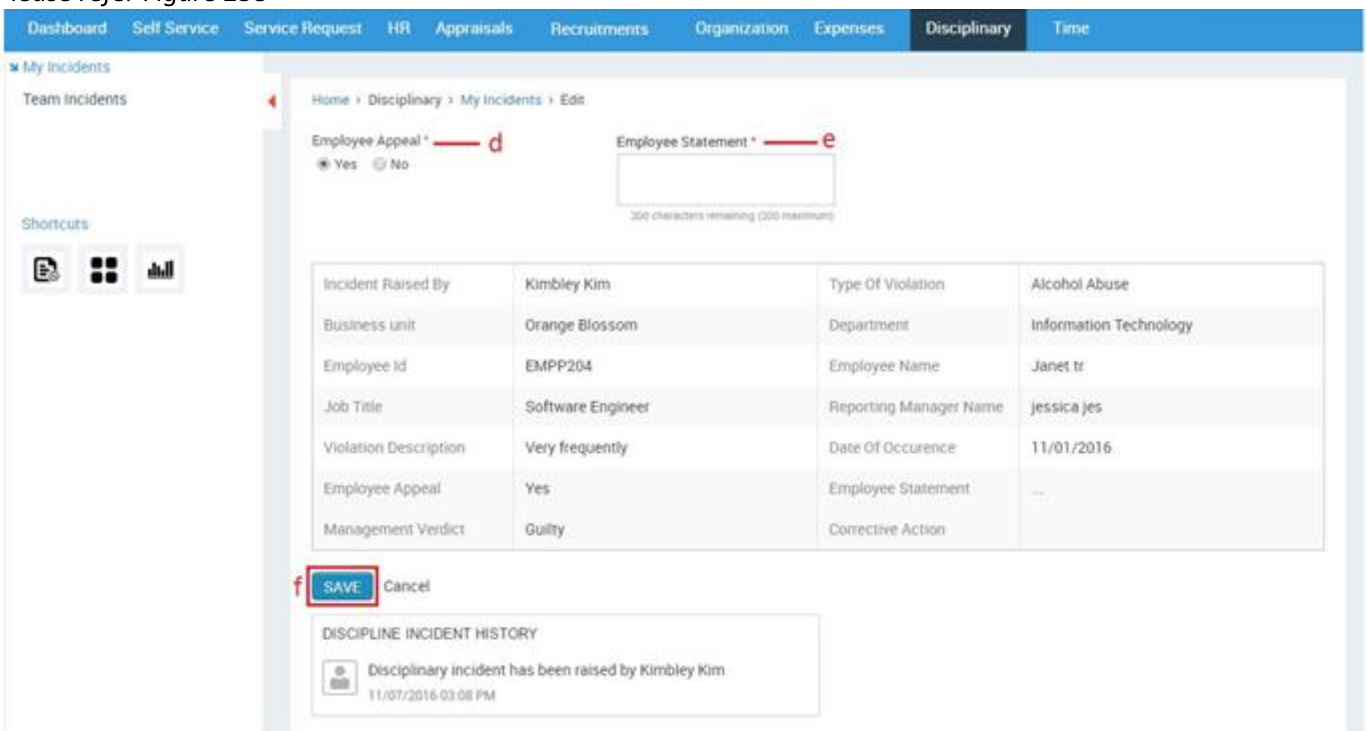


Figure 258

d. Select **Yes** if you want to appeal and **No** if you don’t want to appeal
e. Provide your statement in the **Employee Statements** textbox
f. Click **SAVE** button

17.6 How do I provide an appeal statement for another employee?

Only a Super Admin/Management can provide an appeal statement for other employees (if they’re unavailable)

Please refer Figure 259

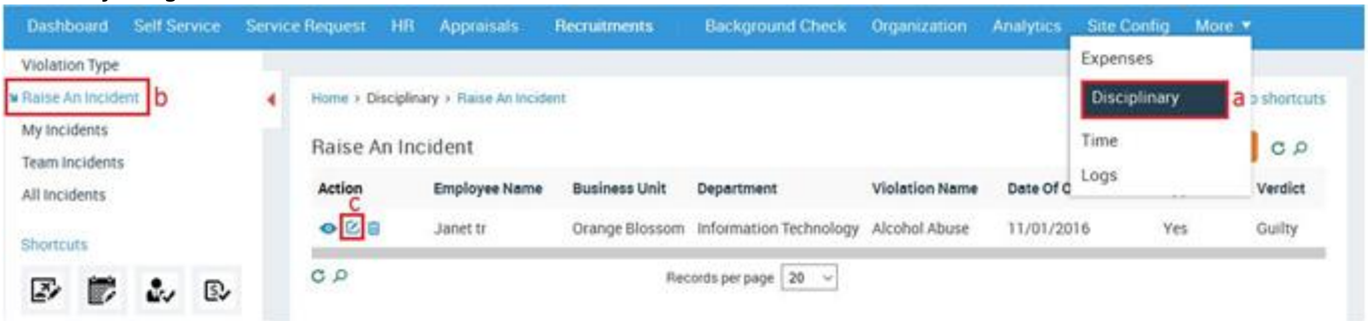


Figure 259

a. Click **Disciplinary** in the top menu
b. Click **Raise an Incident** on the left menu panel
c. Click E**dit** icon in the Action column

Please refer Figure 260

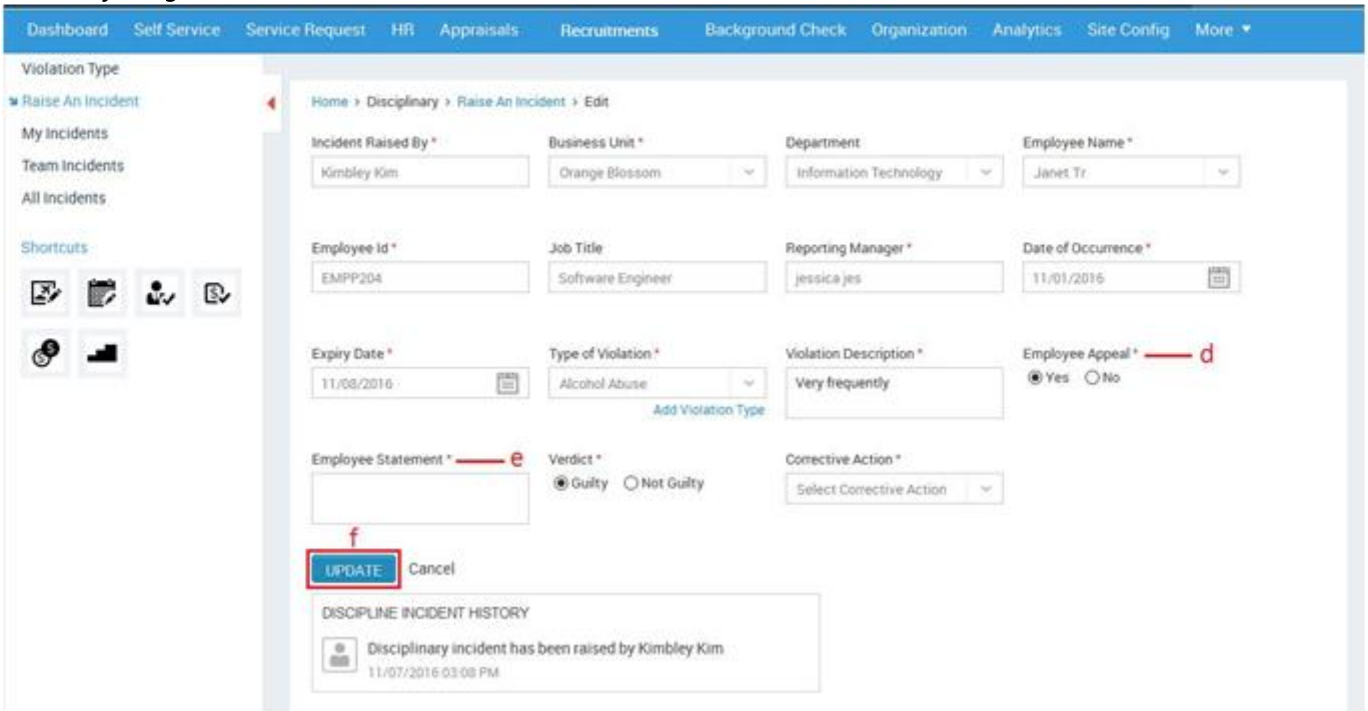


Figure 260

d. Select **Yes** if the employee wants to appeal and **No** if the employee cannot appeal
e. Provide the employee’s statement in the **Employee Statement** textbox
f. Click **Update** button

17.7 How do I take a corrective action against an employee?

Please refer Figure 261

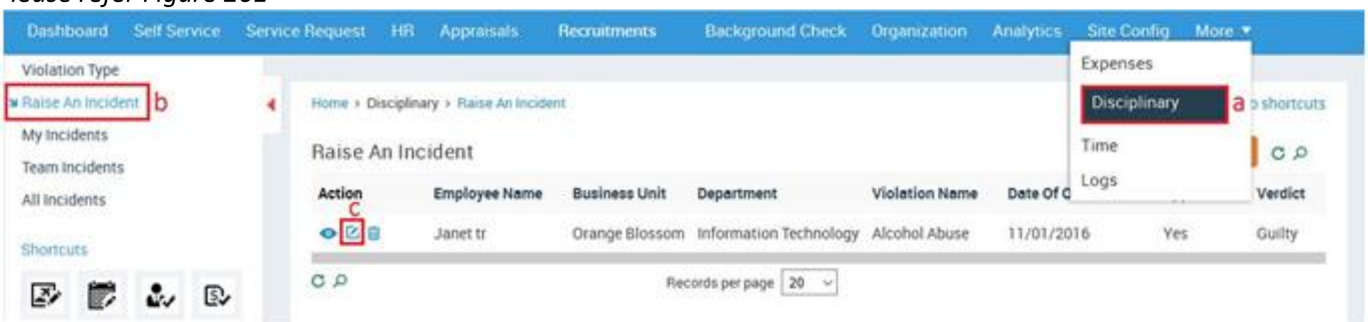


Figure 261

a. Click **Disciplinary** in the top menu
b. Click **Raise an Incident** on the left menu panel
c. Click **Edit** icon in the Action column

Please refer Figure 262

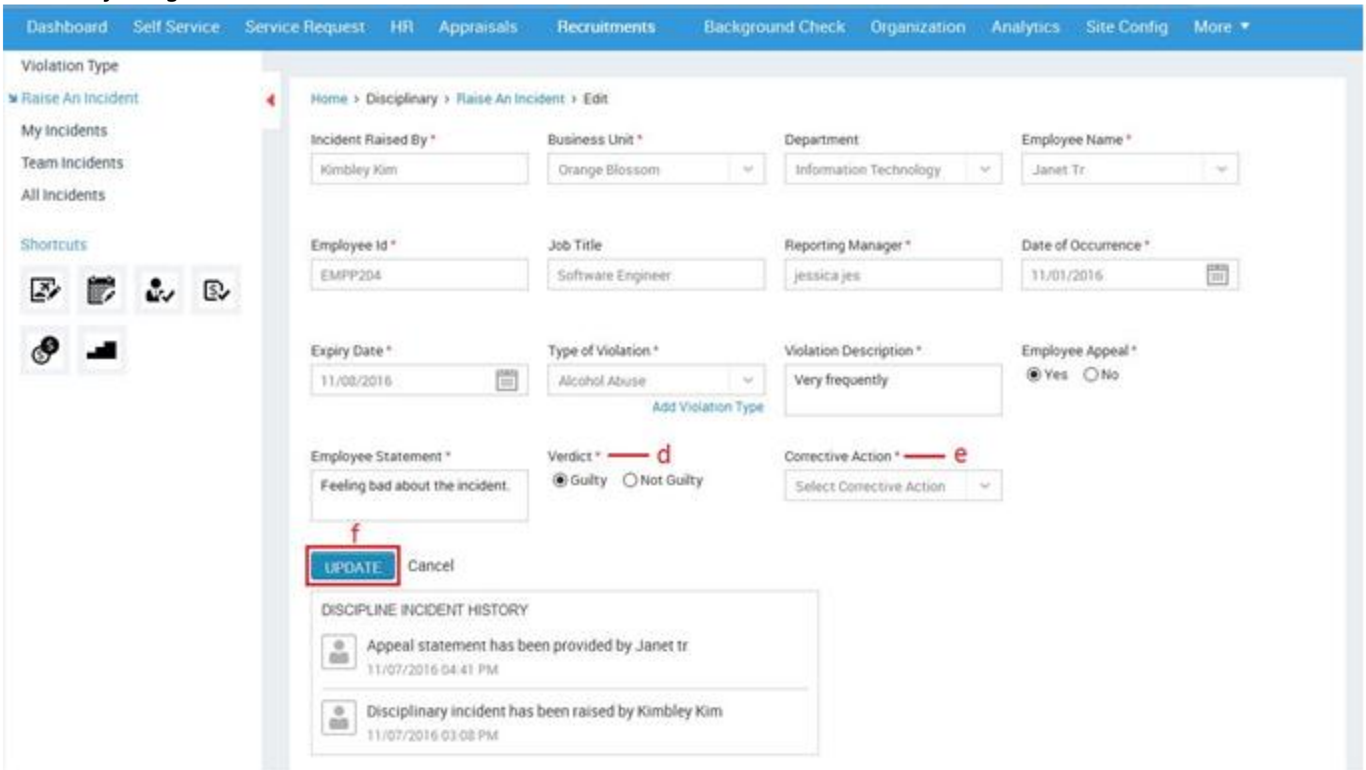


Figure 262

d. Select **Yes** if the employees is guilty and **No** if the employee is not guilty
e. Select a **Corrective Action** that needs to be taken against an employee
f. Click **Update** button

17.8 How do I print my disciplinary incident?

Please refer Figure 263

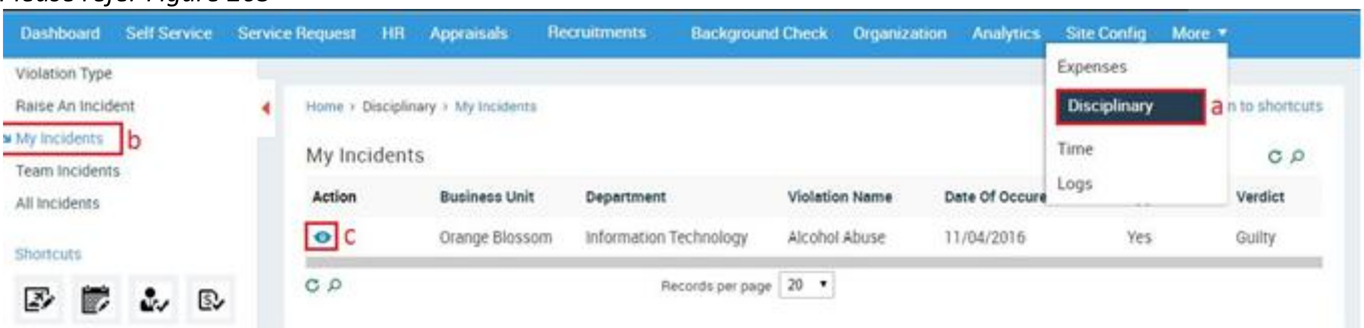


Figure 263

a. Click **Disciplinary** in the top menu
b. Click **My Incidents** on the left menu panel
c. Click **View** icon in the Action column

Please refer Figure 264

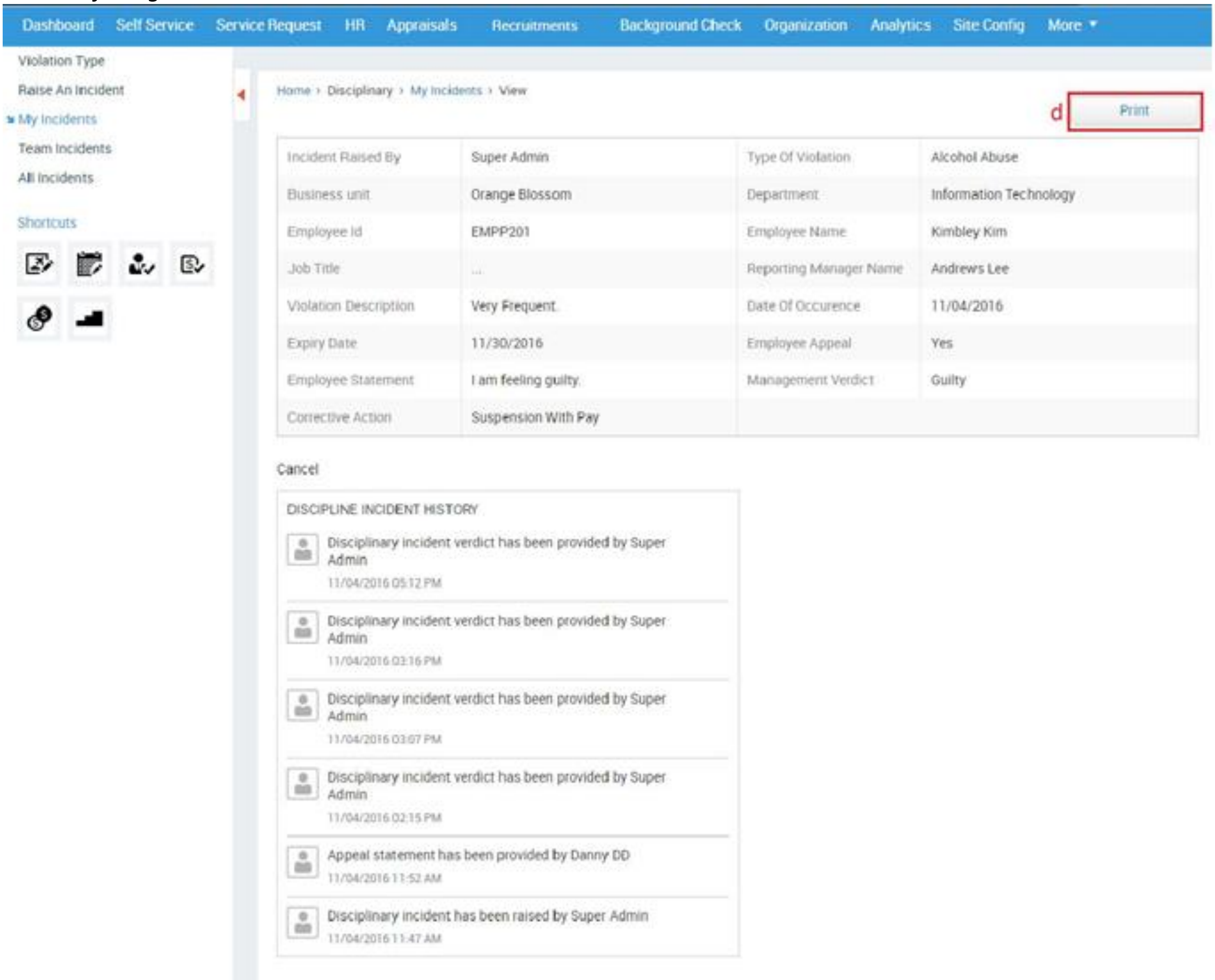


Figure 264

d. Click **Print** button

17.9 How do I print an employee’s disciplinary incident?

Please refer Figure 265

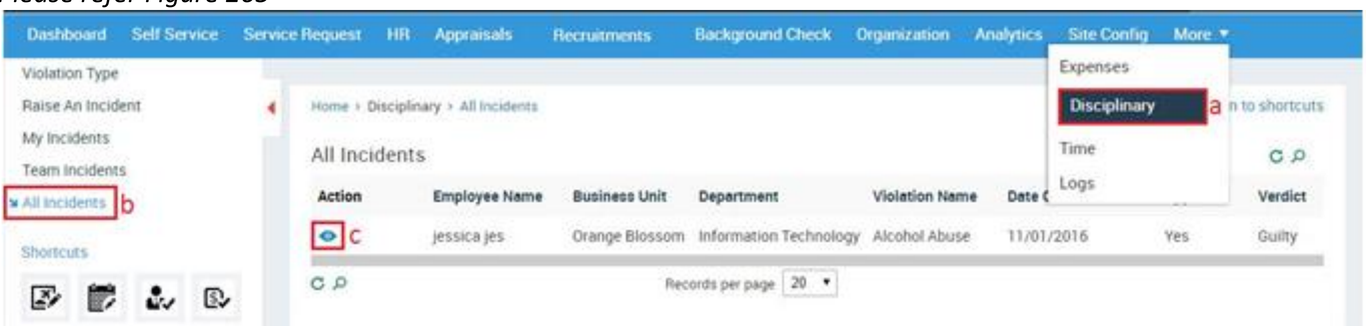


Figure 265

a. Click **Disciplinary** in the top menu
b. Click **All Incidents** on the left menu panel
c. Click **View** icon in the Action column

Please refer Figure 266

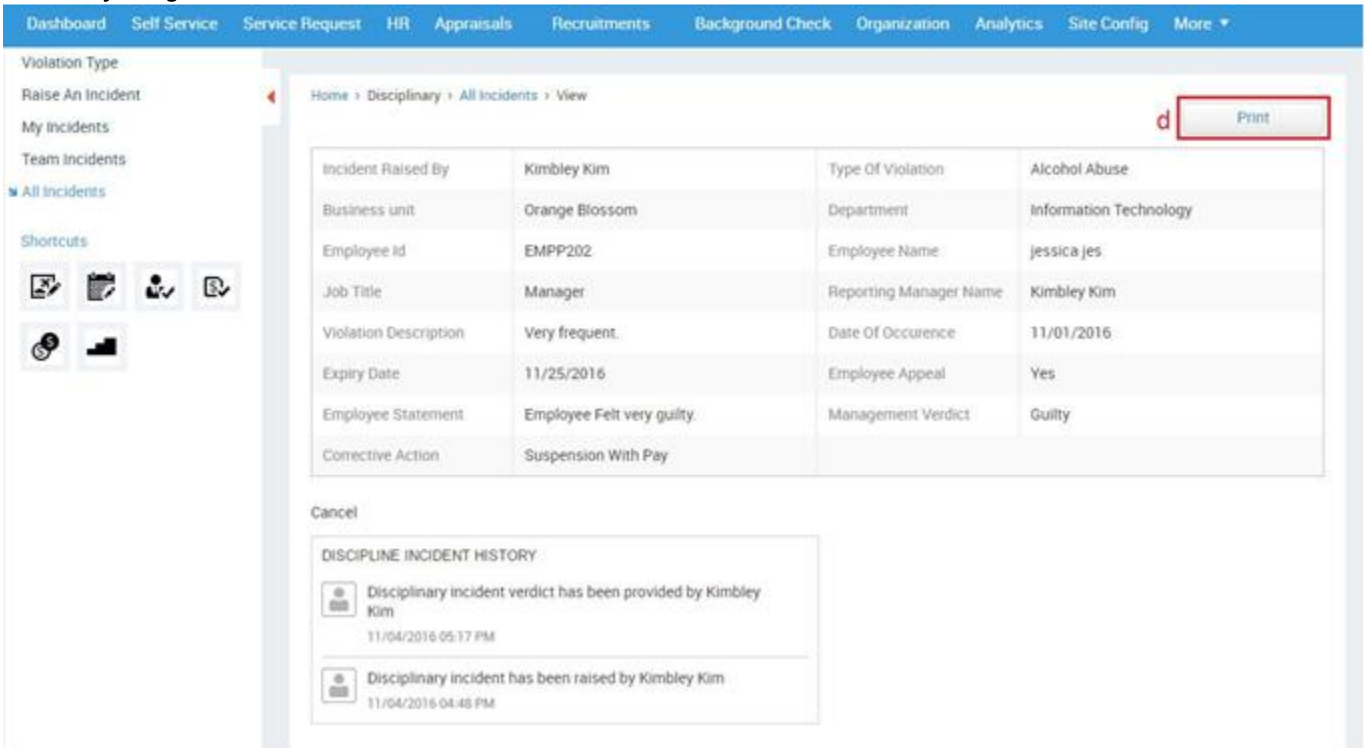
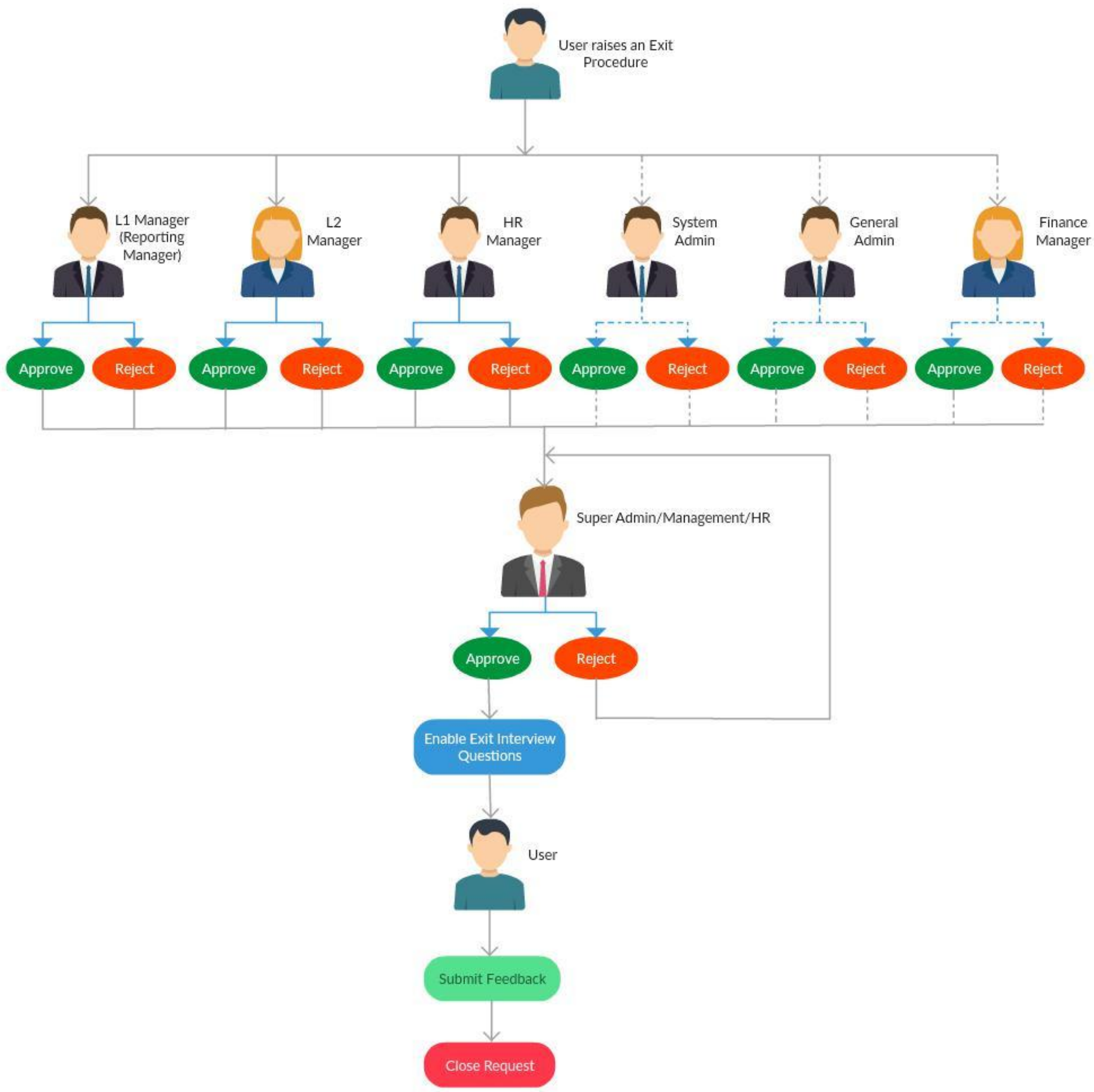


Figure 266

d. Click **Print** button

18. Exit Procedure

HRMS's Exit module will provide your organization a smooth and hassle free exit process. You can create a tailored exit process suitable for your organization. You can customize exit types, notice period, exit request approvers and exit interview questions. Employees can raise an exit request. All the mandatory and configured approvers will be able to provide their approval in an organized manner. Once the Exit Process has been completed, the employee will be enabled to provide his/her feedback through the Exit Interview Questions.



Description:

- A User raises an Exit Request.
- The Approvers and the User will receive an email notification.
- The Approvers can approve/reject the request.
- The Final approval will be done by the Super admin/Management/HR.
- After final approval, Exit interview questions will be enabled to the user by the Super Admin/Management/HR.
- User submits the feedback.
- The Exit Procedure will be closed.

18.1 How do I configure Exit Types?

Please refer Figure 267

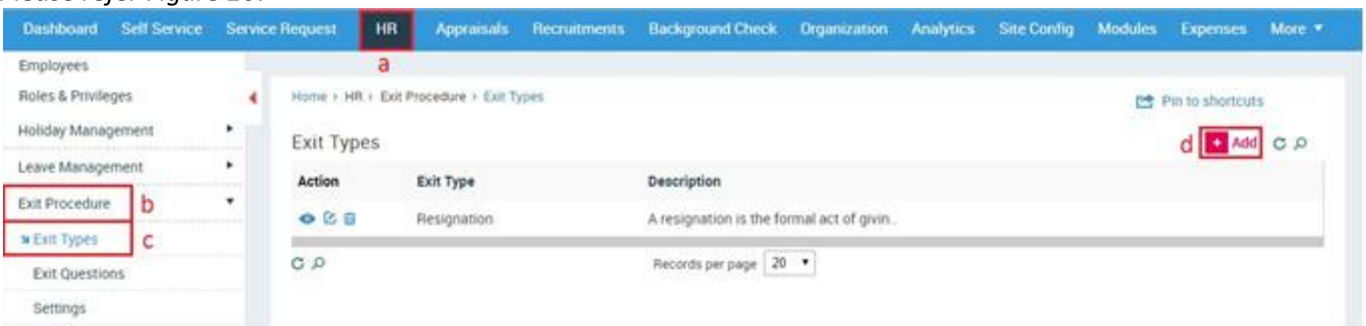


Figure 267

a. Click **HR** in the top menu
b. Click **Exit Procedure** on the left menu panel
c. Click **Exit Types** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 268

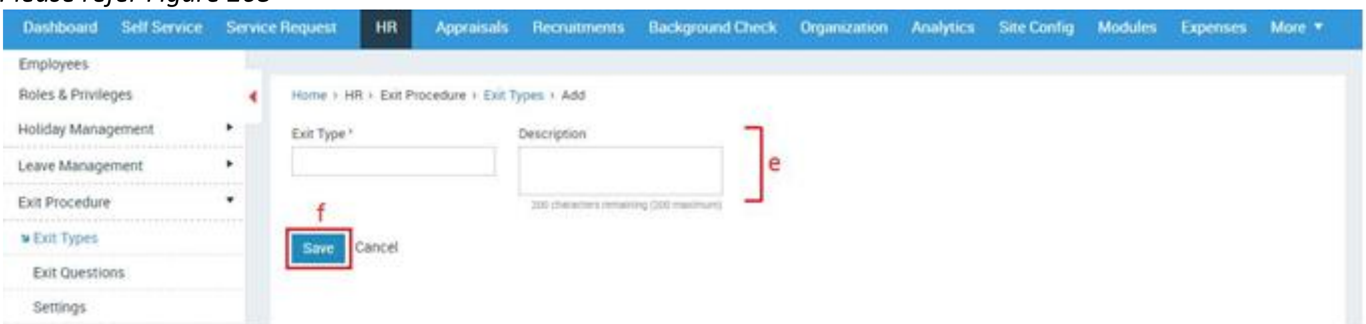


Figure 268

e. Enter 'Exit Type' name and its description
f. Click **Save** button

18.2 How do I configure Exit Questions?

Please refer Figure 269

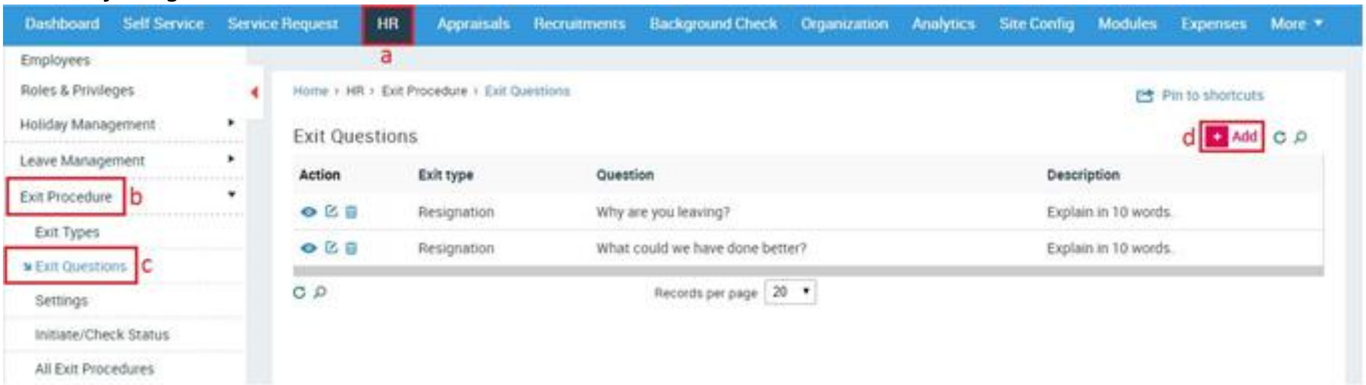


Figure 269

a. Click **HR** in the top menu
b. Click **Exit Procedure** on the left menu panel
c. Click **Exit Questions** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 270

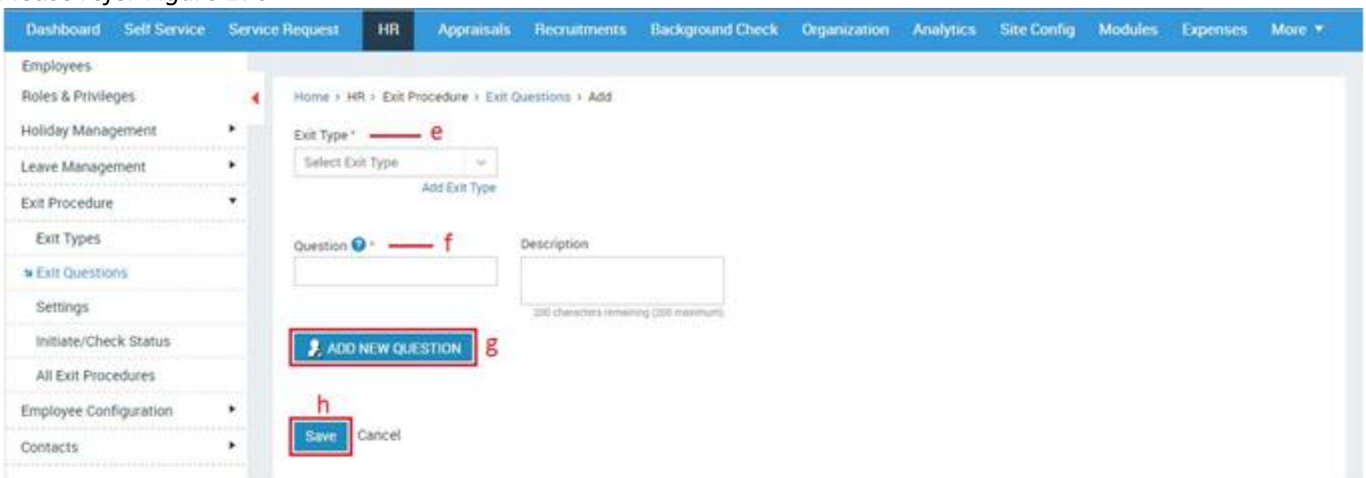


Figure 270

e. Select an Exit Type
f. Enter a Question
g. Click to enter a new question
h. Click **Save** button

18.3 How do I configure Settings?

Please refer Figure 271

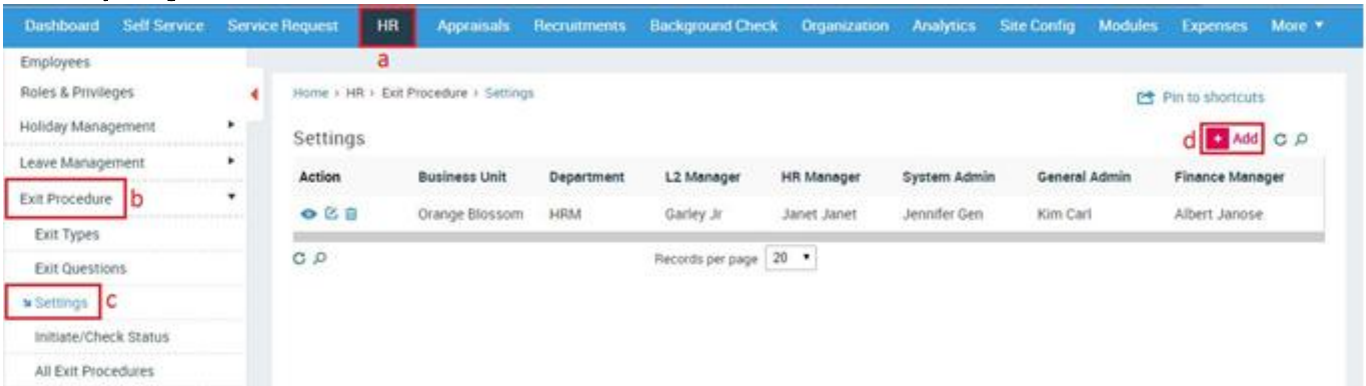


Figure 271

a. Click **HR** in the top menu
b. Click **Exit Procedure** on the left menu panel
c. Click **Settings** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 272

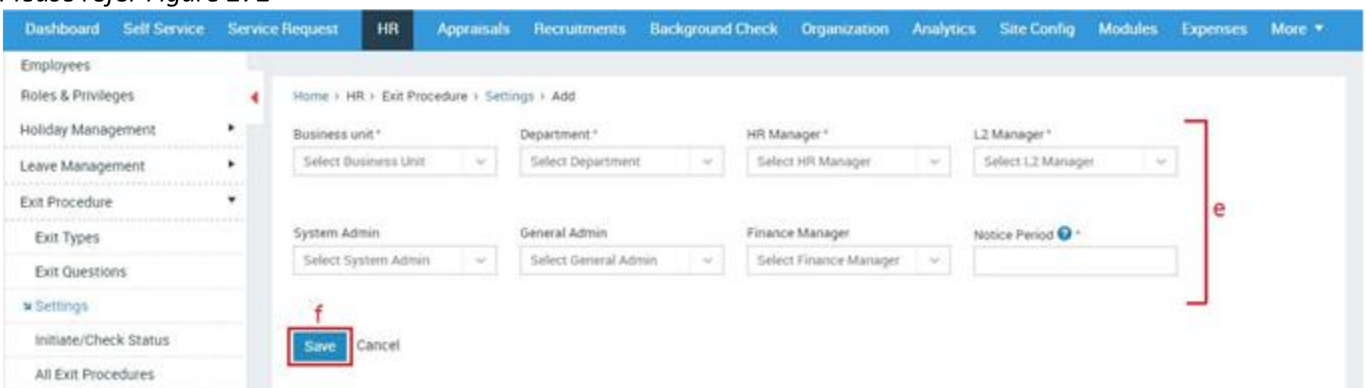


Figure 272

e. Enter the required details

f. Click **Save** button

The reporting manager of an employee will be considered as the L1 Manager during the Exit Procedure.

18.4 How do I initiate an Exit Procedure?

Please refer Figure 273

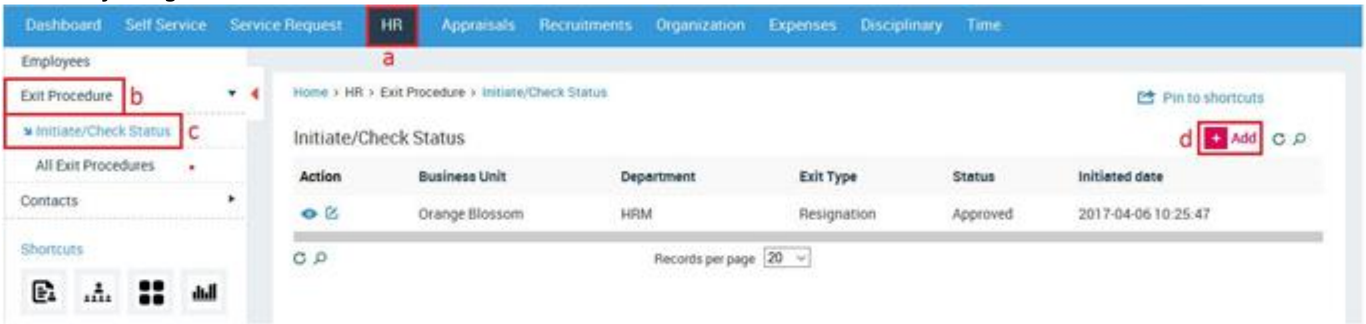


Figure 273

a. Click **HR** in the top menu
b. Click **Exit Procedure** on the left menu panel
c. Click **Initiate/Check Status** in the submenu
d. Click **+Add** button on the right side

Please refer Figure 274

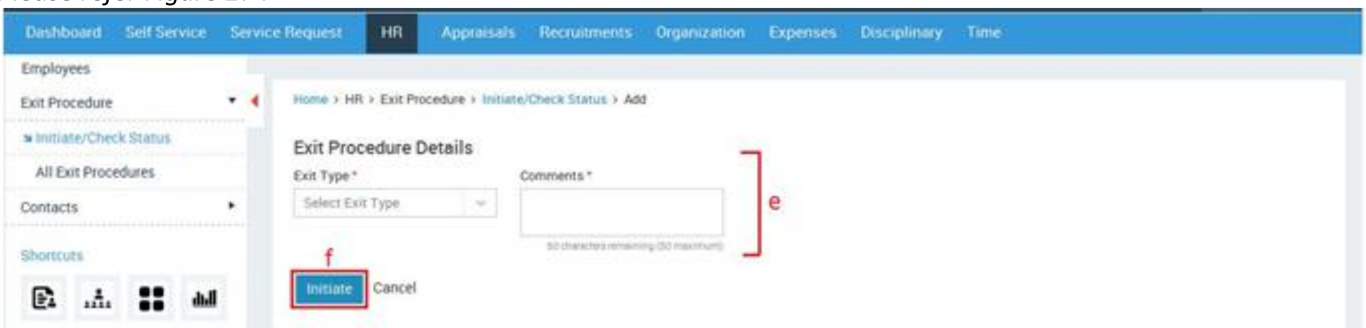


Figure 274

e. Enter the required details
f. Click **Save** button

18.5 How do I approve an Exit Procedure?

Please refer Figure 275

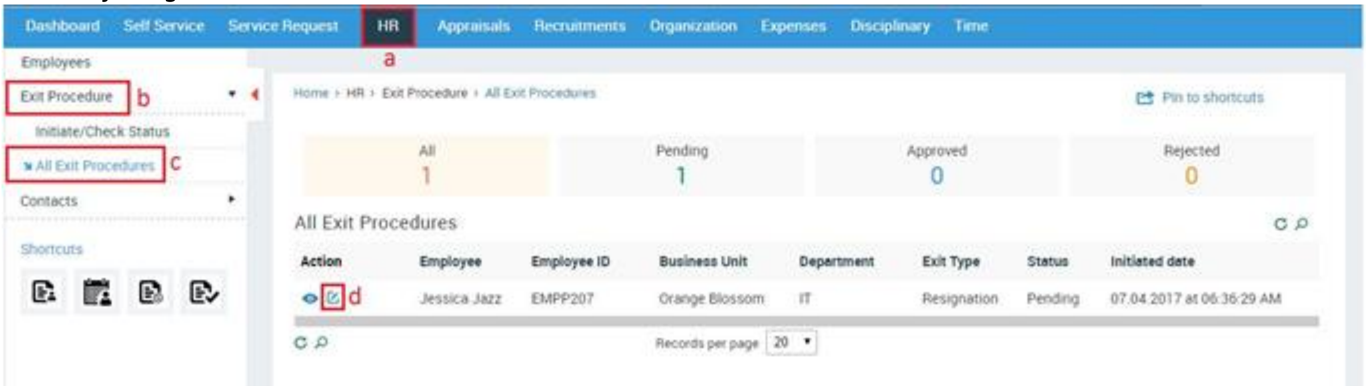


Figure 275

a. Click **HR** in the top menu
b. Click **Exit Procedure** on the left menu panel
c. Click **All Exit Procedures** in the submenu
d. Click **Edit** icon against a record

Please refer Figure 276

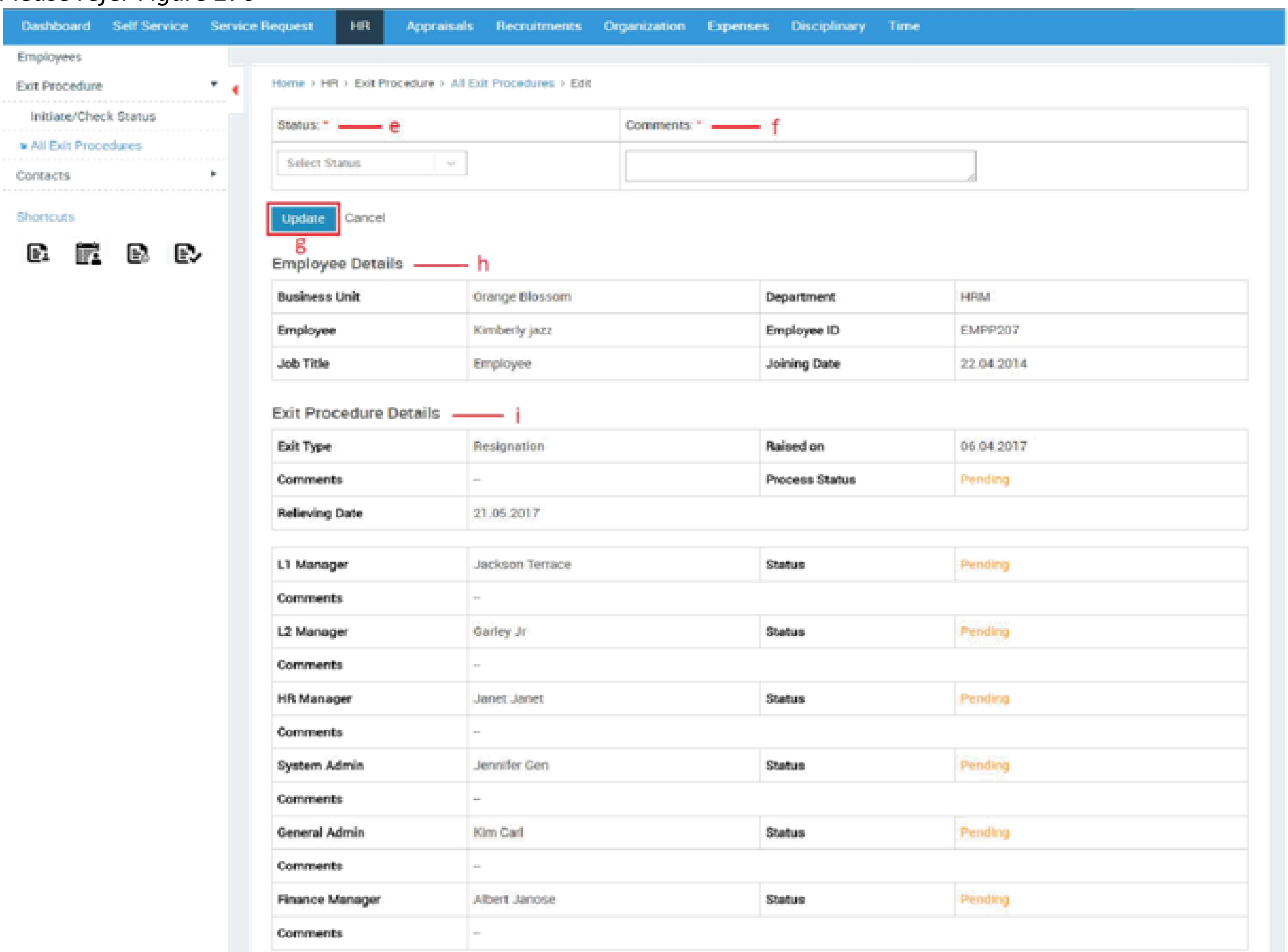


Figure 276

a. Select Exit Status
b. Enter Comments
c. Click **Save** button
d. Details of the employee can be viewed
e. Details of the Exit Procedure along with the status of every level of approval can be viewed

The same procedure (18.5) can be followed by all the roles for providing an approval.

18.6 How do I provide the final approval for an employee's Exit Procedure?

The final approval will be given by the Super Admin/Management/HR.

Please refer Figure 277

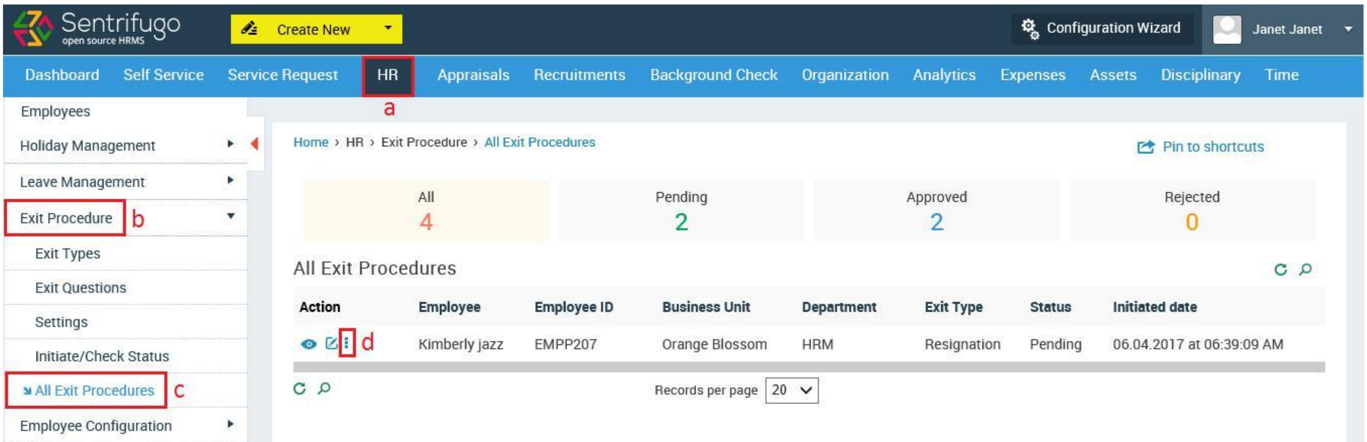


Figure 277

a. Click **HR** in the top menu
b. Click **Exit Procedure** on the left menu panel
c. Click **All Exit Procedures** in the submenu
d. Click **Edit/More** icon against a record

Please refer Figure 278

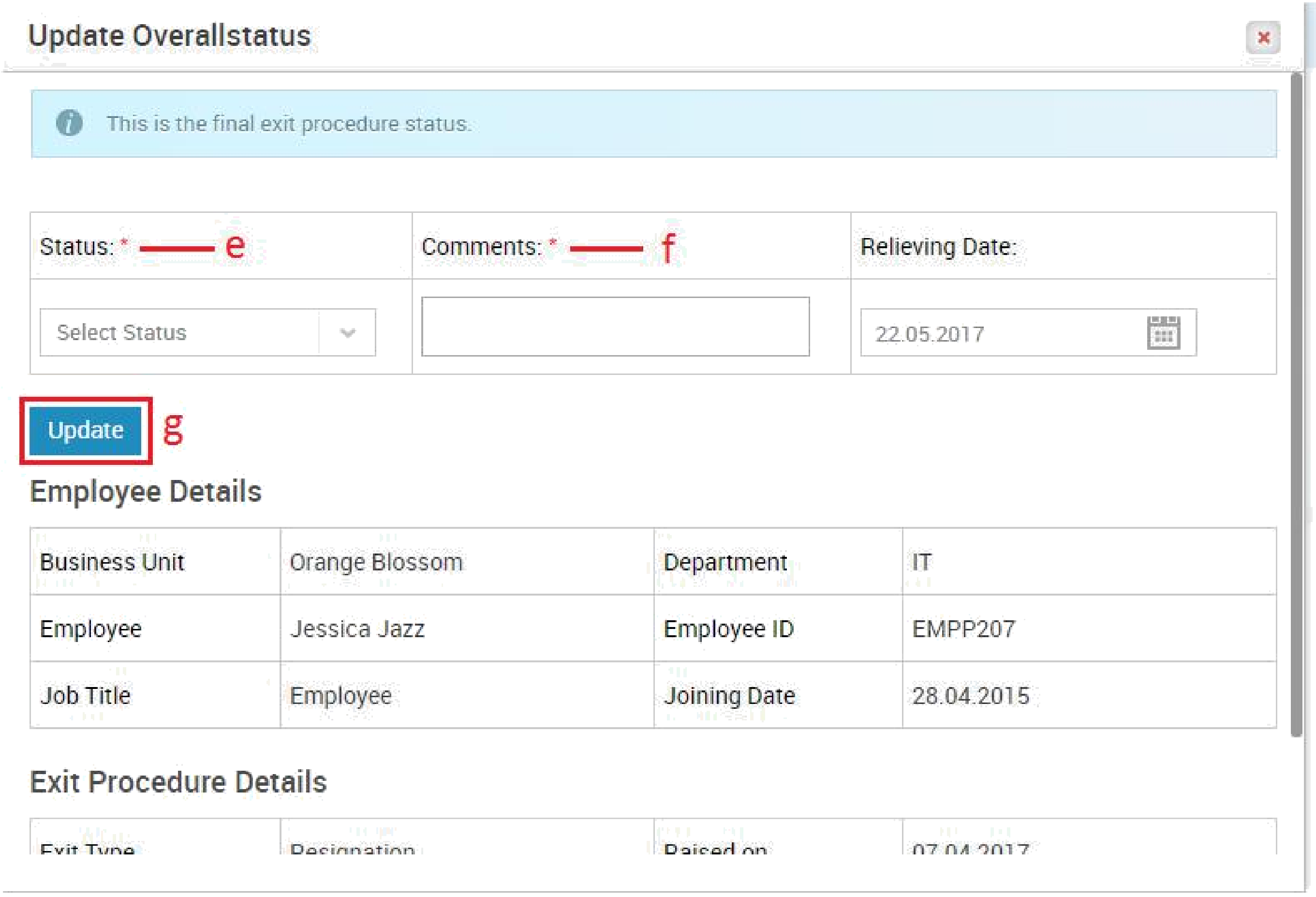


Figure 278

e. Select Status
f. Enter Comments
g. Click **Save** button

18.7 How do I enable Questions for the Exit Interview?

Please refer Figure 279

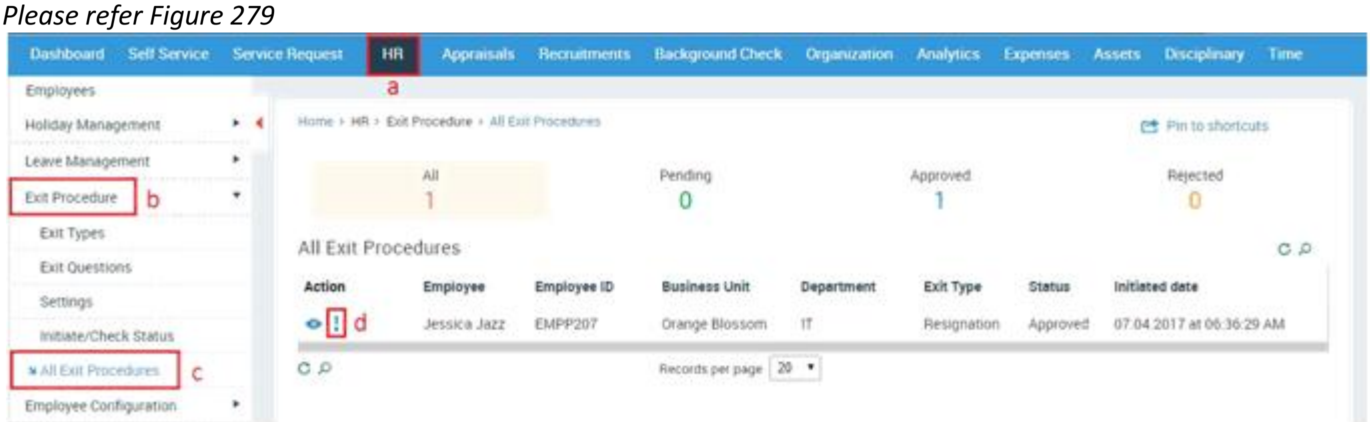


Figure 279

a. Click **HR** in the top menu
b. Click **Exit Procedure** on the left menu panel
c. Click **All Exit Procedures** in the submenu
d. Click **Questions** icon against a record

Please refer Figure 280

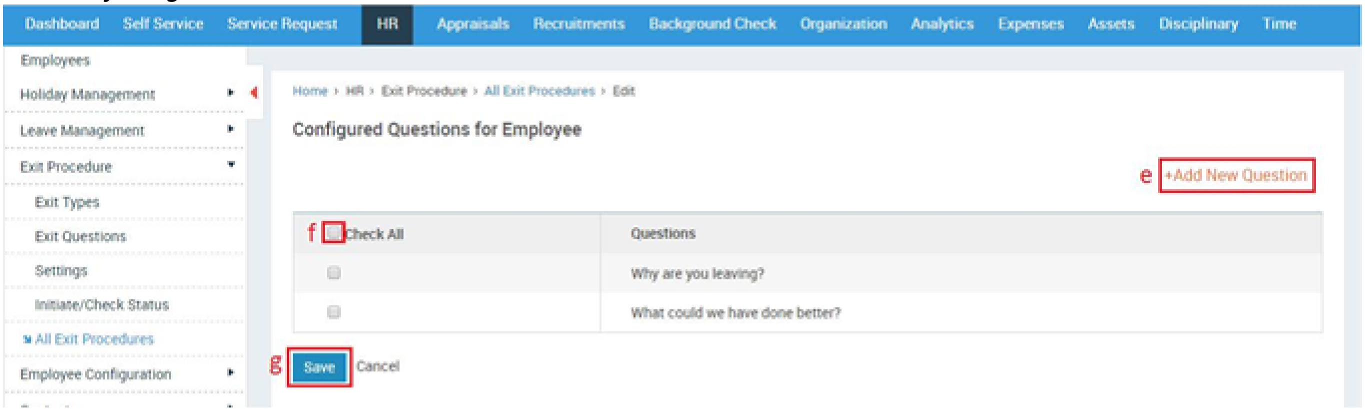


Figure 280

e. Click to add new questions
f. Check the checkbox to select questions
g. Click **Save** button

18.8 How do I answer Questions for the Exit Interview?

Please refer Figure 281

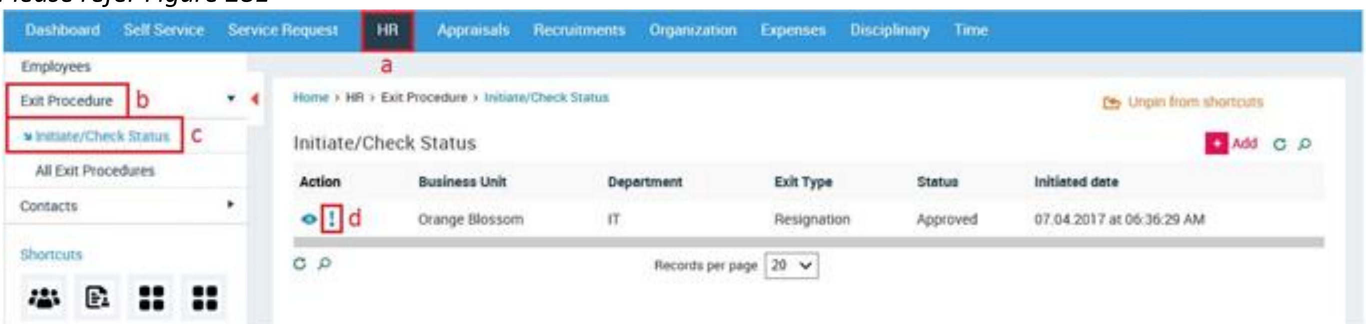


Figure 281

a. Click **HR** in the top menu
b. Click **Exit Procedure** on the left menu panel
c. Click **All Exit Procedures** in the submenu
d. Click **Questions** icon against a record

Please refer Figure 282

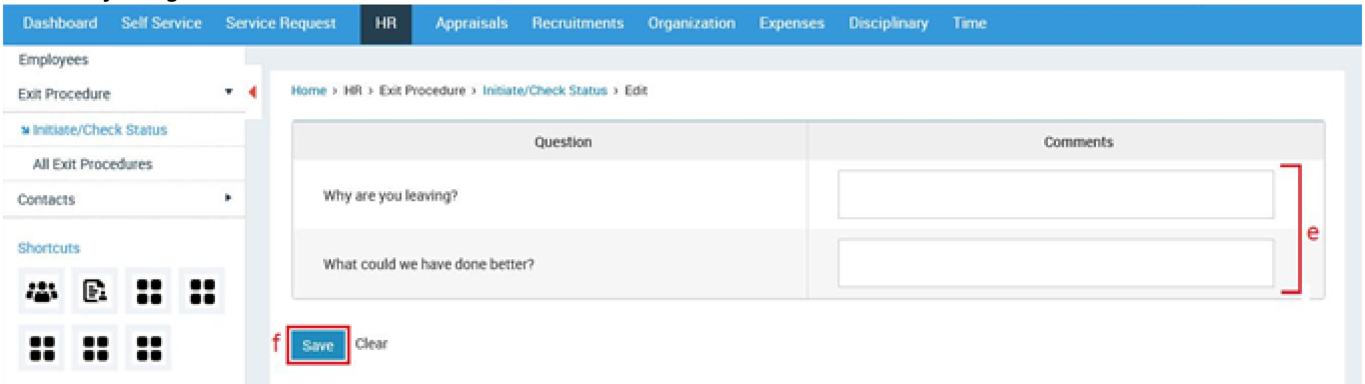


Figure 282

e. Enter Comments
f. Click **Save** button

An email notification will be sent to the employee.

18.9 How do I view an employee's Exit Interview feedback?

Please refer Figure 283

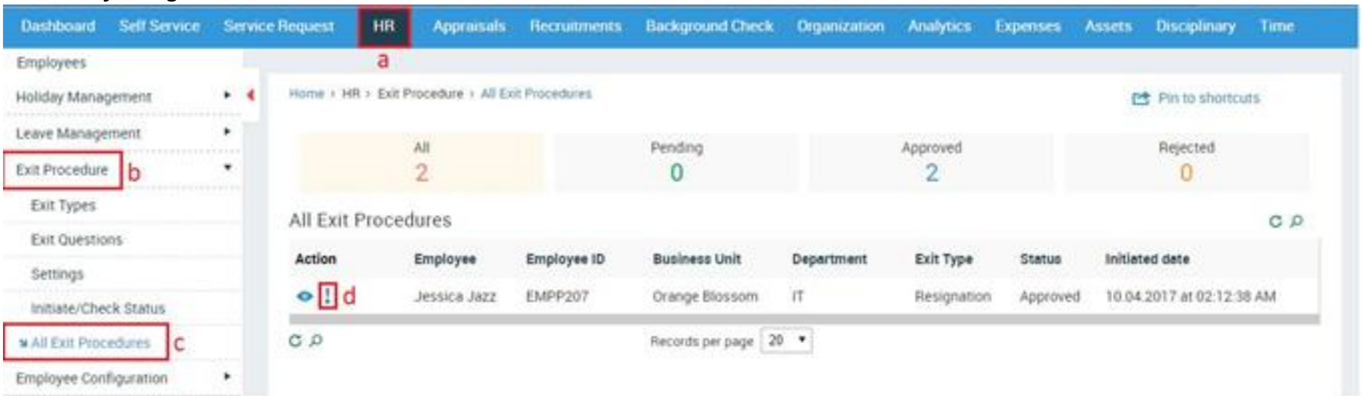


Figure 283

a. Click **HR** in the top menu
b. Click **Exit Procedure** on the left menu panel
c. Click **All Exit Procedures** in the submenu
d. Click **Questions** icon against a record

Please refer Figure 284

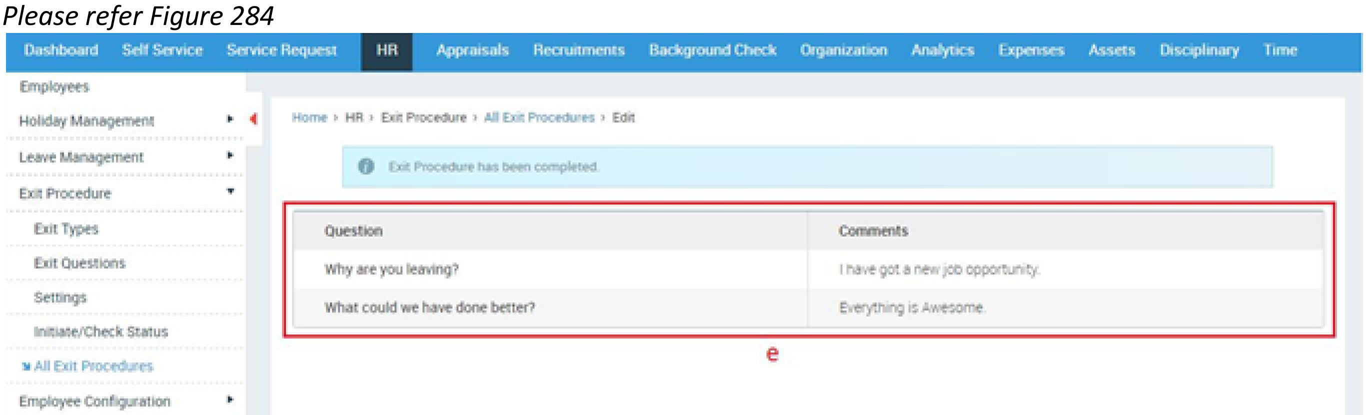


Figure 284

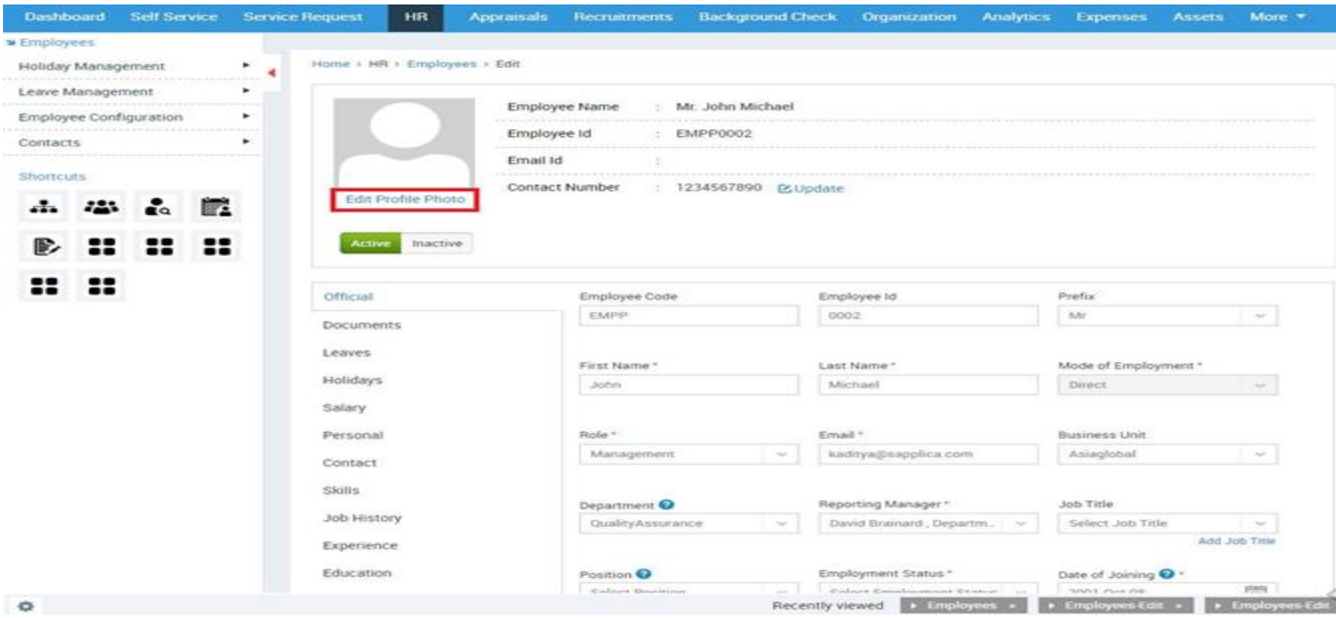
e. Feedback of Exit Interview

An employee's Exit Procedure can be viewed by Super Admin/Management/HR.

19. Additional Features

Upload Employees’ Profile Photo as HR

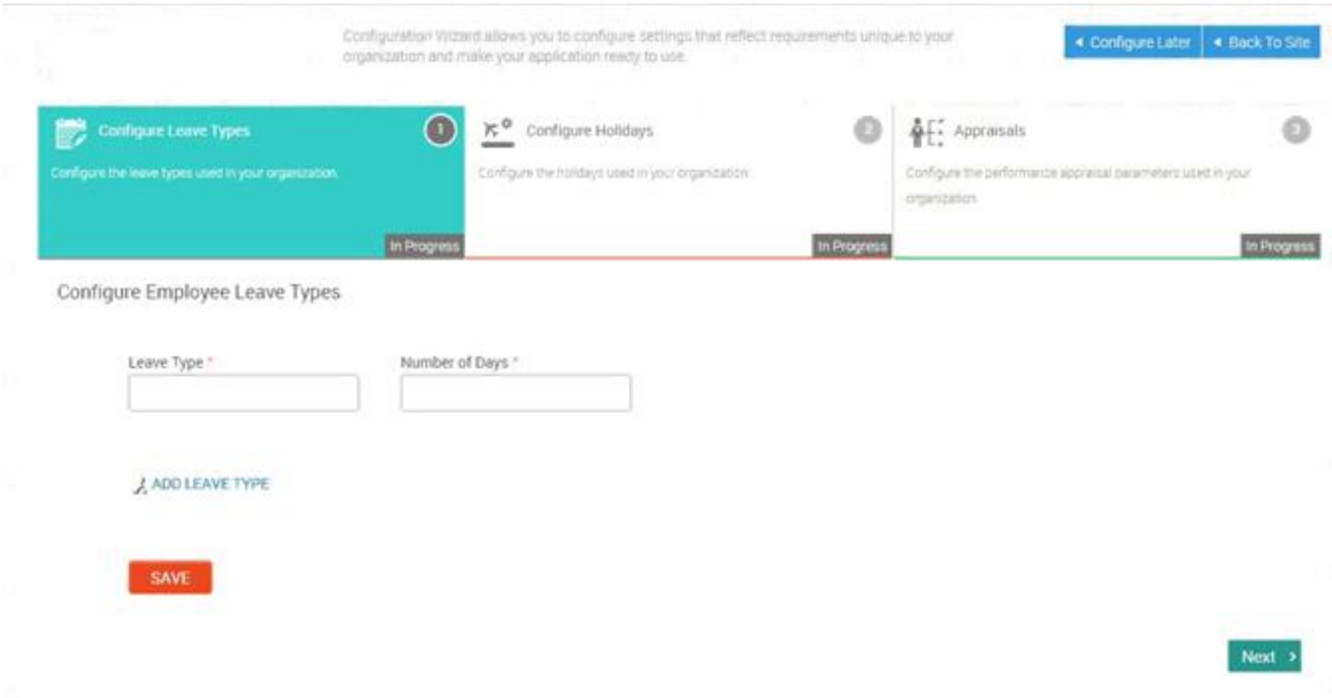
HR can now upload employees’ profile photos.



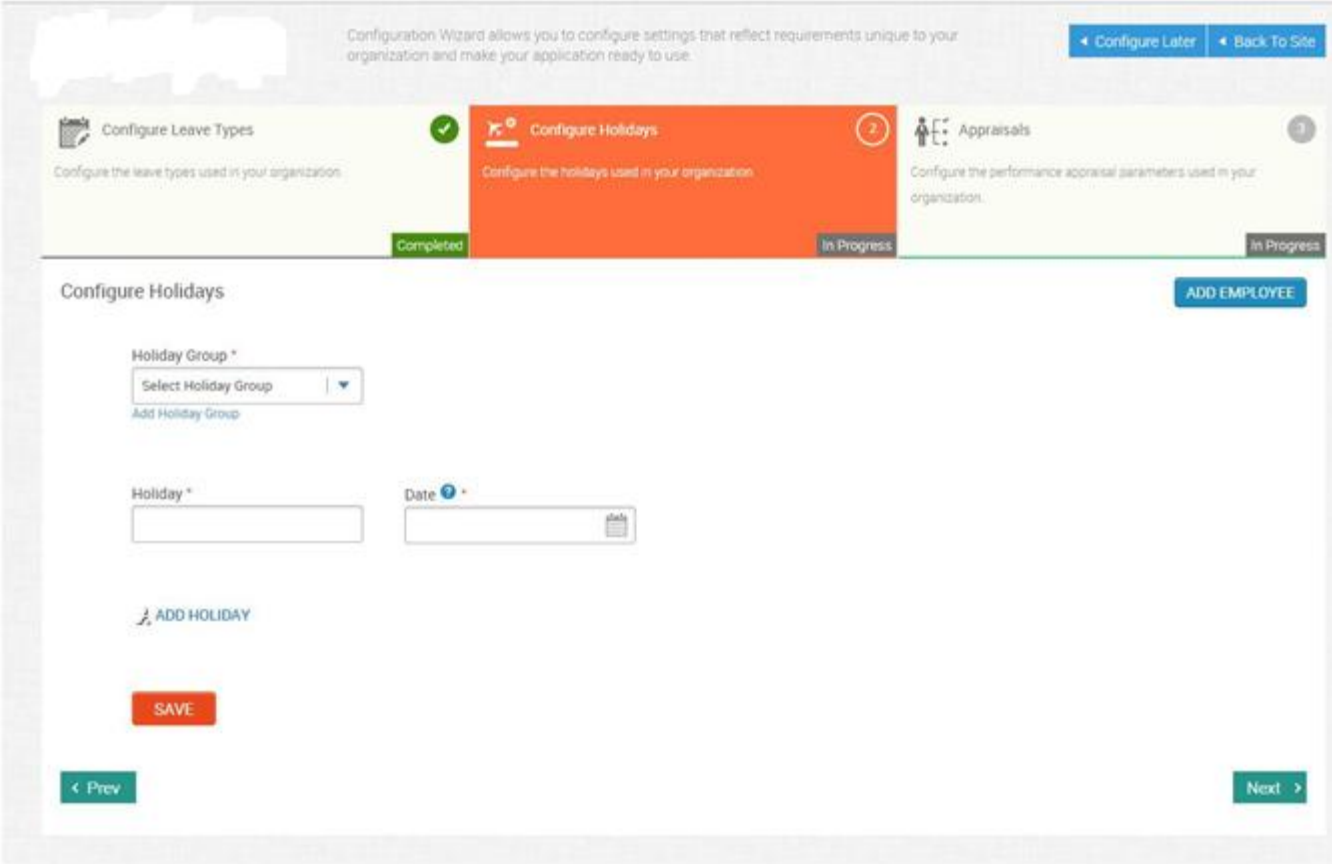
HR Configuration Wizard

The configuration wizard has been designed to aid the user in setting up the application in the right manner and to avoid the confusion regarding how to proceed further after a certain step.

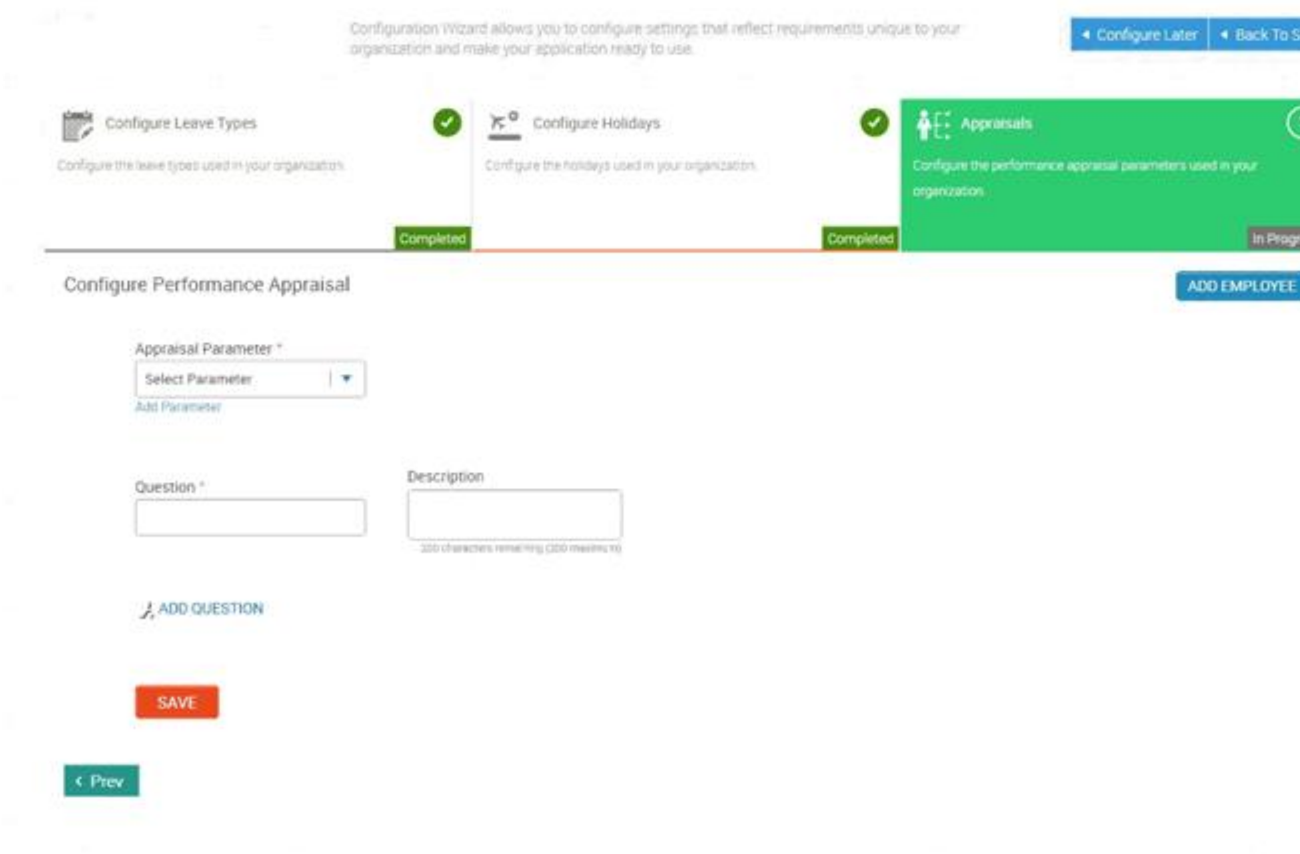
It consists of 3 steps:



Configure Leave Types: Create leave types (E.g. Sick, Vacation) and allocate the number of days for each leave type.



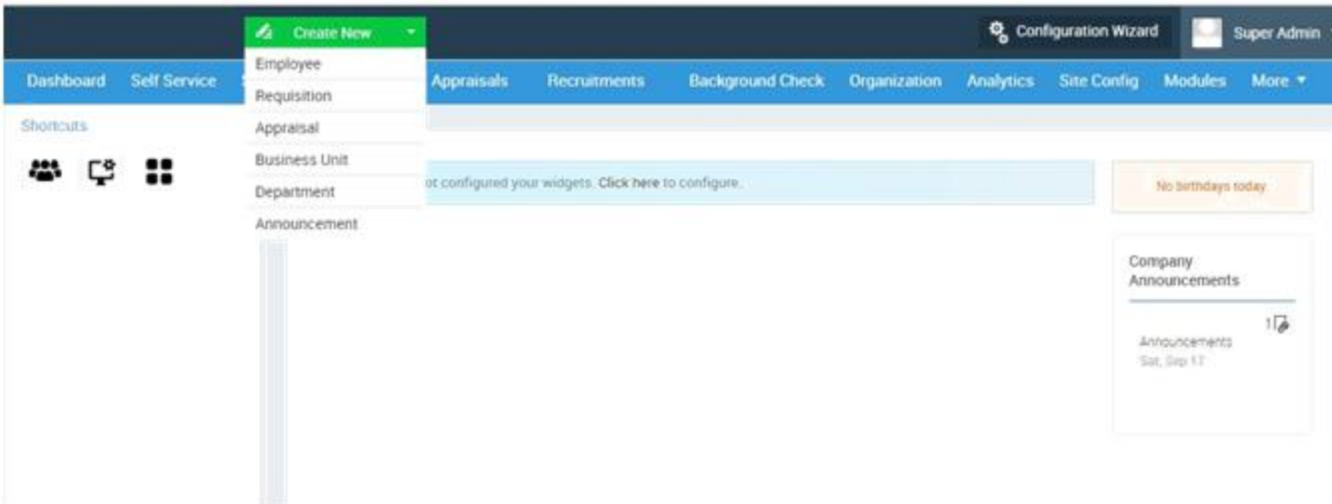
Configure Holidays: Create holiday groups and assign holidays to each group.



- **Appraisals:** Add appraisal parameters (E.g. KPI, KRA) and allot questions for each parameter.

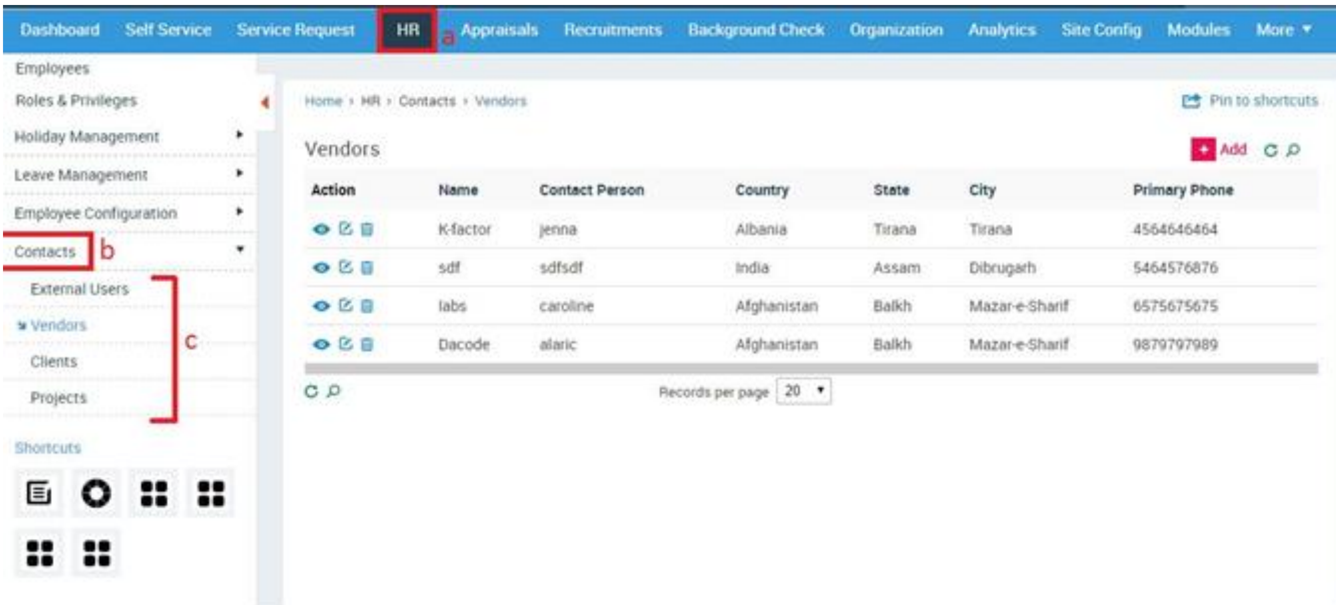
Create New Shortcut Button

This shortcut button is placed on the top left corner (beside your organization logo) of the application. This button has been designed to save your time from menu redirections. The number of options displayed depends on a user's role privileges. For example, if you belong to the Management role group, then you will be able to create new Employees, Requisitions, Appraisals, Business Units, and Departments etc. If you belong to the Employee role group you can only create Service and Leave requests.



Contacts

You can now manage and store your organization's external users, vendors, and clients' details all in one place.



a. Click **HR** in the top menu
b. Click **Contacts** on the left menu panel
c. You can click on any contact to add/view External Users/Vendors/Clients