

Table of Contents

Prerequisite Skills
How to Use This Guide.....
1. Getting Started.....
1.1 What are the roles available in HRMS?
1.1.1 Super Admin
1.1.2 Default Role Groups in HRMS
1.2 How do I log in to HRMS?
1.2.1 Super Admin
1.2.2 Employees/Users
1.3 How do I set up HRMS?.....
1.3.1 Configuration Wizard
1.4 How do I add Employees to HRMS?.....
1.4.1 Adding Organization Head (Employee #2)
1.4.2 Adding Other Employees
1.4.3 Adding Employees in Bulk
1.5 How do I add Business Units and Departments (without using configuration wizard)?.....
1.5.1 Adding Business Units
1.5.2 Adding Departments
1.5.3 No Business Unit
1.6 How do I add Job Titles and Positions?.....
1.6.1 Adding Job Titles
1.6.2 Adding Positions
2. Dashboard.....
2.1 How do I add Widgets?
2.2 How do I add Shortcuts?
2.3 How do I add Announcements?.....
2.4 How do I add Birthday Announcements?.....
3. Leave Management

3.1 How do I configure Leave Management Settings?
3.2 How do I create Leave Types?.....
3.3 How do I allocate Leave to Employees?
3.4 How do I deduct Leaves from an Employee?.....
3.5 How do I create HR Email Group for Leave Management?
3.6 How do I raise a Leave Request?
3.7 How do I cancel a Leave Request?
3.8 How do I Approve/Reject an Employee's Leave Request?
3.9 How do I view the Approved Leaves and Leave Requests of all the employees reporting to me?
3.10 How do I view my own Leave(s)/Leave Request(s)?
3.11 How do I create Holiday Groups?.....
3.12 How do I create Holidays?.....
3.13 How do I assign Holidays to Employees?
4. Self Service
4.1 Leave Requests.....
4.2 How do I view My Details?
4.3 How do I view My Holiday Calendar?
4.4 How do I view My Team details?
5. Service Request.....
5.1 How do I create Service Request Categories?
5.2 How do I create Service Request Types?.....
5.3 How do I configure Service Request settings?....
5.4 Who are Approvers, Executors and Viewers?
5.5 How do I raise a Service Request?.....
5.6 How do I view my Service Requests?.....
5.7 How do I execute a Service Request?
5.8 How do I approve a Service Request as Management (Approver)/Manager?
5.9 How do I close a Service Request as an Executor?
6. HR
6.1 Adding Employees.....
6.2 How do I manage Roles & Privileges?.....
6.3 How do I add External Users?
6.4 Holiday Management
6.5 Leave Management

6.6 Employee Configuration
6.6.1 How do I select Employee Tabs?
6.6.2 How do I set Employee Configuration?
6.6.3 How do I configure Identity Documents settings?
7. Recruitments.....
7.1 How do I create a Job Requisition/Opening?.....
7.2 How do I Approve/Reject a Requisition/Opening?.....
7.3 How do I enter a Candidate's details?
7.4 How do I Schedule an Interview?
7.5 How do I provide Feedback for an Interview?.....
7.6 How do I select/reject a Shortlisted Candidate? (Management's Final Approval)
7.7 How do I add a Candidate as an Employee?
8. Background Check
8.1 How do I add a Screening Type?.....
8.2 How do I add an Agency?.....
8.3 How do I select an Employee/Candidate for Screening?
8.4 How do I set up HR and Management Group Emails?
8.5 How do I provide Feedback as an External User?
8.6 How do I close a Background Check Process?
9. Organization
9.1 How do I view/edit information about my Organization?.....
9.2 How do I view my Organization Structure?
9.3 How do I view my Organization Hierarchy?
9.4 How do I add Announcements?.....
9.5 How do I add Policy Documents?
9.6 How do I view Policy Documents?.....
10. Analytics.....
10.1 How do I view/generate Reports?.....
11. Site Config
11.1 How do I view/edit Site Preferences?.....
11.2 How do I set General Site Preferences?
11.3 How do I set Identity Codes?
11.4 What should I do if my Country/State/City are not available in HRMS?.....
11.5 How do I add Currency and Currency Conversions?

12. Modules.....
13. Logs.....
13.1 How do I view Activity Logs?.....
13.2 How do I view User Logs?.....
14. Expenses.....
14.1 How do I add an Expense Category?.....
14.2 How do I add a Payment Mode?
14.3 How do I add an Expense?.....
14.4 How do I submit an Expense for approval?
14.5 How do I export an Expense?.....
14.6 How do I clone an Expense?.....
14.7 How do I approve/reject Employee Expenses?.....
14.8 How do I forward an Expense to another Manager?
14.9 How do I upload Receipts?.....
14.10 How do I download my Receipts?.....
14.11 What are Unreported Receipts?
14.12 How do I add Receipts to Expenses/Trips?.....
14.13 How do I delete a Receipt?
14.14 How do I create a Trip?.....
14.15 How do I allot an Advance to an Employee?.....
14.16 How do I view the Advance allotted to me?
15. Assets.....
15.1 How do I create an Asset Category?.....
15.2 How do I add an Asset?.....
15.3 How do I view my Asset(s) details?.....
15.4 How do I raise a Service Request related to my Asset?
16. Appraisals.....
16.1 How do I add Parameters?
16.2 How do I add Questions?.....
16.3 How do I add Skills?.....
16.4 How do I add Ratings?.....
16.5 How do I Initialize an Appraisal process?

 Step 1: Initialization

 Step 2: Configure Line Managers

Step 3: Configure Appraisal Parameters

- 16.6 How do I undo/discard Line Manager Configuration?
- 16.7 How do I set additional appraisal questions as a Manager?
- 16.8 How do I enable the appraisal to Employees?
- 16.9 How do I view a Manager's Status?
- 16.10 How do I provide Self Appraisal?
- 16.11 How do I provide appraisal ratings and comments for an Employee?
- 16.12 How do I check Employee Status?
- 16.13 What is Feedforward?.....
- 16.14 How do I add Questions for Feedforward?
- 16.15 How do I initialize Feedforward?
- 16.16 How do I Appraise my Manager?
- 16.17 How do I view Managers' Feedforward details?
- 16.18 How do I view Employee Feedforward Status?
- 16.19 How do I view my Appraisal History?
- 16.20 How do I view my team's Appraisal History?

17. Disciplinary Incident Management.....

- 17.1 How do I create a Violation Type?
- 17.2 How do I raise a disciplinary incident?
- 17.3 How do I view my disciplinary incidents?
- 17.4 How do I view my team members' (employees) disciplinary incidents?
- 17.5 How do I provide my appeal statement?
- 17.6 How do I provide an appeal statement for another employee?
- 17.7 How do I take a corrective action against an employee?
- 17.8 How do I print my disciplinary incident?.....
- 17.9 How do I print an employee's disciplinary incident?.....

18. Exit Procedure.....

- 18.1 How do I configure Exit Types?.....
- 18.2 How do I configure Exit Questions?
- 18.3 How do I configure Settings?
- 18.4 How do I initiate an Exit Procedure?
- 18.5 How do I approve an Exit Procedure?
- 18.6 How do I provide the final approval for an employee's Exit Procedure?
- 18.7 How do I enable Questions for the Exit Interview?

18.8 How do I answer Questions for the Exit Interview?
18.9 How do I view an employee's Exit Interview feedback?.....
19. Additional Features
Upload Employees' Profile Photo
HR Configuration Wizard.....
Create New Shortcut Button.....
Contacts

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.



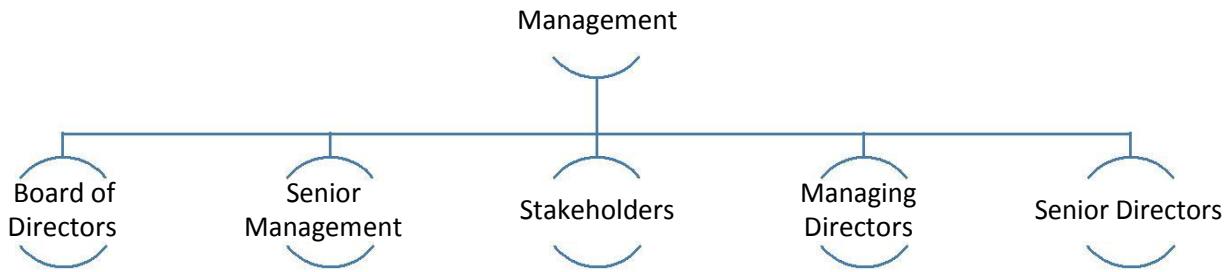
Since the Super Admin will not be included in the employee's list, he/she will not be able to perform employee actions like raising a leave request, service request, submitting timesheets etc. You can add another employee to HRMS for the Super Admin user, with his/her actual details like Name, Job Title, 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
3rd Eye Advisory

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**

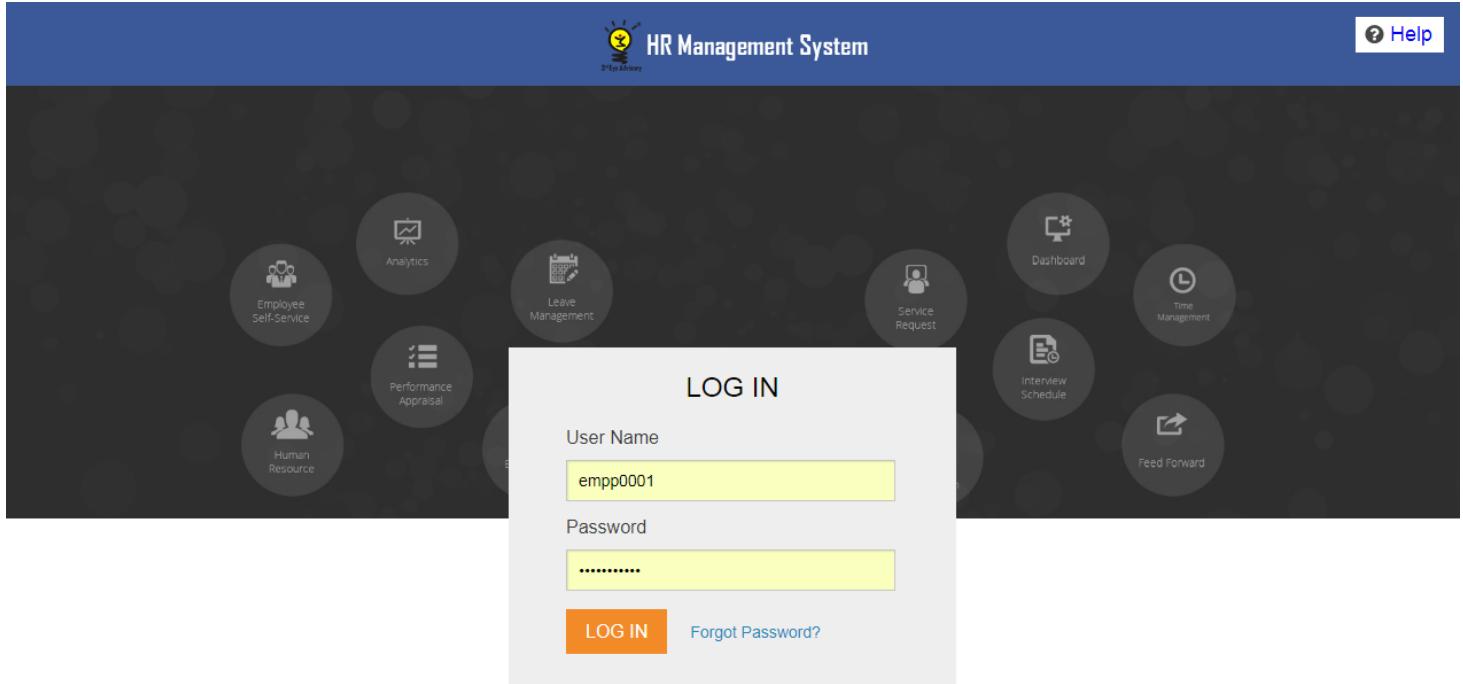
Password: **vybesyvej**

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.



© 3rd Eye Advisory® - HRMS 2017 Powered By 3rd Eye Advisory®

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.

The screenshot shows the 'HR Management System' configuration wizard. At the top, a banner states: 'Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use.' A 'Back To Site' button is in the top right. Below the banner, there's a teal header bar with a 'Modules' icon and a green checkmark, followed by the text: 'Enable the modules that are essential to your human resource process by selecting or deselecting them.' A 'Completed' button is below it. To the right are five module cards: 'Site Config' (green checkmark, completed), 'Organization' (green checkmark, completed), 'Business Units' (green checkmark, completed), 'Service Request' (green checkmark, completed), and another 'Service Request' (green checkmark, completed). Below these cards is a 'Manage Modules' link and an 'ADD EMPLOYEE' button. The main area features a circular diagram with 'HRMS' in the center. Eight segments radiate from the center, each representing a module: 'Time' (clock icon), 'Appraisals' (bar chart icon), 'Talent Acquisition' (person icon), 'Background Check' (checkmark icon), 'Service Request' (person icon), 'Analytics' (bar chart icon), 'Time' (clock icon), and 'Appraisals' (bar chart icon). A legend at the bottom indicates: 'Active' (blue square), 'Inactive' (white square), and 'Not Available' (grey square). A 'Next >' button is in the bottom right corner.

Figure 4

- a. All the modules are displayed in a circular representation
- b. Click on a module icon to activate or deactivate 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.

Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use. [Back To Site](#)

Site Configuration

Employee Code ? * EMPP **Currency ? *** Indian Rupee (INR) **Date Format ? *** Four Digit Year, Month And ... **Time Format ? *** Hour Only, With Meridian

Default Time Zone ? * Asia/Kolkata [IST] **Country ? *** India **State ? *** Maharashtra **City ? *** Mumbai (Bombay)

Default Password ? * Alphanumeric

The password should contain atleast one alphabet and one number. The minimum length should be 6 characters and maximum length should be 15 characters. Eg: myname123

Employment Status ? *

Contract, Deputation, Full Time, Left, Part Time, Permanent, Probationary, Resigned, Suspended, Temporary

SAVE

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.

The screenshot shows the 'Organization' configuration step in the HR Management System. At the top, a banner states: 'Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use.' Below this, a navigation bar includes a 'Back To Site' link. The main area is titled 'Configure Organization Information' and contains the following fields:

- Organization**: Third Eye Advisory Services Private Limited
- Website**: <https://www.3rdeyedevadvisory.com>
- Organization Started On**: 2017/04/01
- Total Employees**: 20-50
- Primary Phone Number**: 8303000500
- Secondary Phone Number**: (empty)
- Fax Number**: 8303000500
- Country**: India
- State**: Maharashtra
- City**: Mumbai (Bombay)
- Main Branch Address**: 339, Level 3, Neo Vikram Building, New Link Road, Andheri West, Mumbai-400058 Maharashtra
- Address 1**: (empty)
- Address 2**: (empty)
- Organization Description**: (empty)
- Upload Organization Logo**: LOGO (265px X 40px) - Upload Logo
- Business Domain**: Consulting, Engineering, Insurance/Finance

A large green progress bar at the bottom indicates the step is completed. A blue 'ADD EMPLOYEE' button is located on the right side of the configuration form.

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.

Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use. [Back To Site](#)

Modules ✓ Site Config ✓ Organization ✓ Business Units ✓ Service Request ✓

Enable the modules that are essential to your human resource process by selecting or deselecting them. Completed

Configure the standards used in your organization by providing the site preferences. Completed

Provide your organization information to get your system up and running. Completed

Configure business unit and departments in your organization. Completed

Configure service request settings used in your organization. Completed

Business Unit And Departments

Business Unit *
No Business Unit | ▾
[Add Business Unit](#)

Department *

[ADD DEPARTMENT](#)

Street Address *

SAVE

[◀ Prev](#) [Next ▶](#)

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

HR Management System Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use. [Back To Site](#)

Modules Site Config Organization Business Units Service Request

Completed Completed Completed Completed Completed

Service Request Categories And Requests

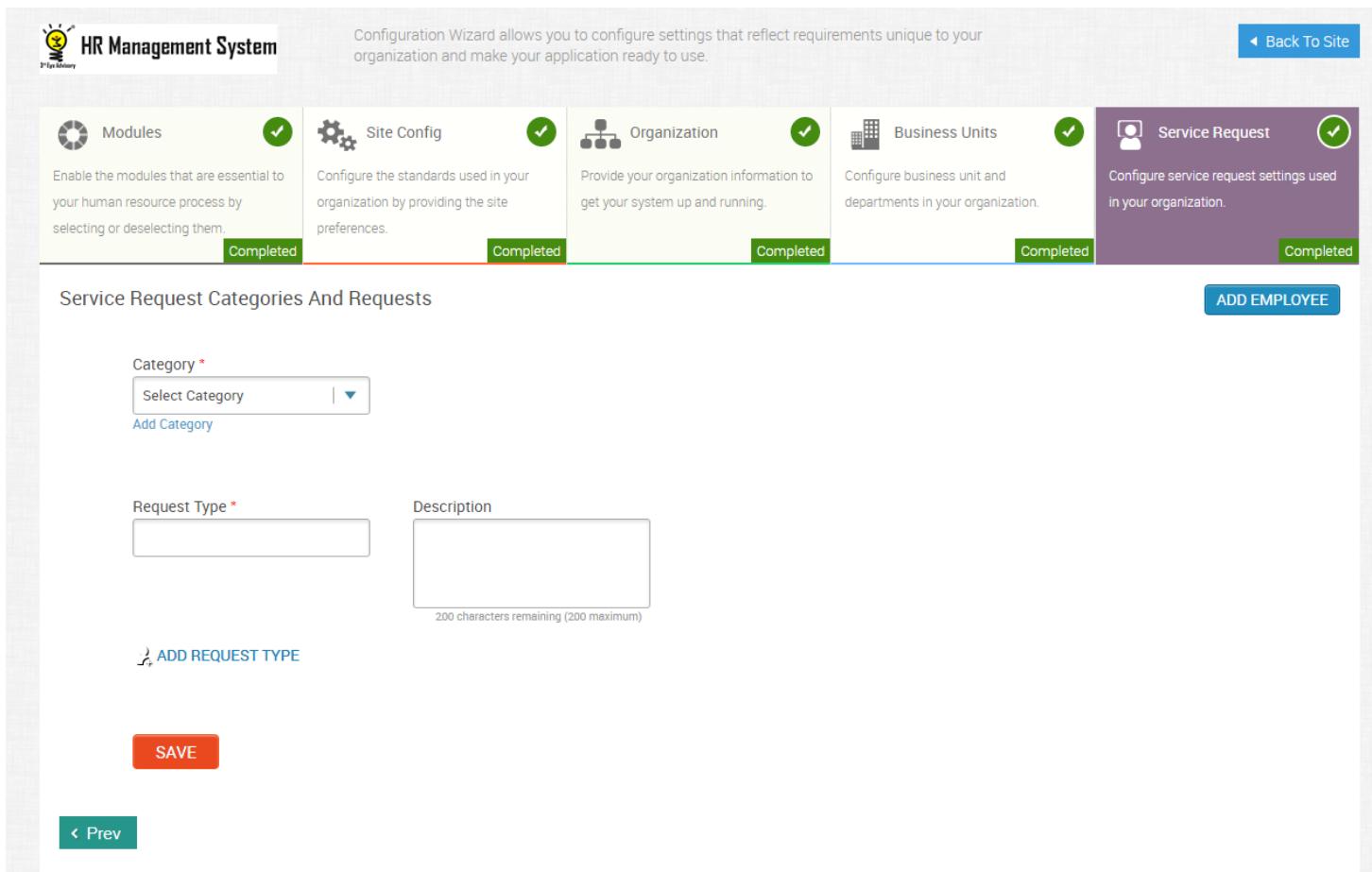
Category * Select Category | Add Category

Request Type * Description
200 characters remaining (200 maximum)

[ADD REQUEST TYPE](#)

SAVE

< Prev



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

The screenshot shows the HR Management System interface. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and 'More'. The 'HR' tab is selected. On the left, there's a sidebar with 'Employees' (selected), 'Roles & Privileges', 'Holiday Management', 'Leave Management', 'Exit Procedure', 'Employee Configuration', and 'Contacts'. Below this is a 'Shortcuts' section with various icons. The main content area is titled 'Change Organization Head' and instructs to 'Please assign a Reporting manager to the current organization head.' It features a 'Reporting Manager' dropdown labeled 'Select Reporting Manager'. Below this is a form for 'EXISTING EMPLOYEE (OR) NEW EMPLOYEE'. It has fields for 'Employee Code *' (EMPP), 'Employee Id *', 'First Name *', 'Last Name *', 'Prefix' (dropdown: Select Prefix), 'Role *' (dropdown: Select Role), 'Email *', 'Job Title' (dropdown: Select Job Title), 'Position' (dropdown: Select A Position), 'Date of Joining *' (calendar icon), and 'Management Description' (text area with placeholder '200 characters remaining (200 maximum)'). At the bottom are 'Save' and 'Cancel' buttons. The bottom navigation bar shows 'Recently viewed' with links to 'Employees-Edit' and 'Employees'.

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.

The screenshot shows the HR Management System interface. The top navigation bar includes 'Create New' (with a dropdown arrow), 'Configuration Wizard', 'Super Admin', and other menu items like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. The 'HR' tab is selected. On the left, a sidebar has 'Employees' expanded, showing Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration, and Contacts. Below that is a 'Shortcuts' section with various icons. The main content area shows a list of employees under 'Employees'. The list includes:

Employee ID	Name	Role	Department
EMPP004	Rajeev Pandey	Employee	ITES
EMPP003	Vibhor Misra	Management	Human Resource Advisory
EMPP007	Sushma Saxena	HR Manager	Human Resource Advisory
EMPP005	Prateek Agrawal	Employee	Marketing Advisory
EMPP006	Abhishek Agrwal	Employee	Marketing Advisory
EMPP002	Saurabh Shakyawar	Senior Executive	DBMS

Each employee entry includes a profile icon, email address, and phone number. There are three 'More' buttons (three dots) next to each entry. A search bar at the top right allows for category selection, searching, and clearing. Buttons for 'Import Employees', 'Import format', and '+ Add' are also present. The bottom of the screen shows a toolbar with 'Recently viewed' links for 'Employees-Edit', 'Employees', and 'Employees-Add'.

Figure 10

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

Please refer Figure 11.

Home > HR > Employees > Add

Official	Employee Code *	Employee Id *	Prefix
	EMPP		Select Prefix
Documents	Configure Identity Codes		
Leave	First Name *	Last Name *	Mode of Employment *
Holidays			Direct
Salary	Role *	Email *	Business Unit
Personal	Select Role		No Business Unit
Contact	Department ? *	Reporting Manager *	Job Title
Skills	Select Department	Select Reporting Manager	Select Job Title
Job History	Position ?	Employment Status *	Date of Joining ? *
Experience	Select Position	Select Employment Status	Add Job Title
Education	Date of Leaving ?	Years of Experience	Work Telephone Number
Training & Certification			
Medical Claims	Extension	Fax	
Disability			
Dependency			
Visa and Immigration			
Corporate Card			
Work Eligibility			

Save **Cancel**

Recently viewed: Employees, Employees-Add, Employees

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.

The screenshot shows the HR Management System interface. The top navigation bar includes 'Create New', 'Configuration Wizard', 'Super Admin', and a 'More' dropdown. The main menu has categories like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. The 'HR' tab is selected. On the left, there's a sidebar with 'Employees' and 'Shortcuts' sections. The main content area displays a grid of employee profiles. Each profile card includes a user icon, name, role, department, and contact information (Employee ID, email, phone). At the top right of the grid, there are buttons for 'Import Employees' (green), 'Import format' (grey), and '+ Add' (red). Below the grid, there's a 'Help' link. The bottom of the screen shows a toolbar with 'Recently viewed' items: 'Employees-Edit', 'Employees', and 'Employees-Add'. The status bar at the bottom indicates the current cell is I28.

Figure 12

- Click **HR** in the top menu
- Click **Import Format** on the right side above the Employees grid to download the format
- 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.

The screenshot shows an Excel spreadsheet titled 'Normal'. The columns are labeled A through L. The first row contains the column headers: Prefix, First Name, Last Name, Employee Id, Role Type, Email, Business, Department, Reporting, Job Title, Position, and Employment Status. The second row contains sample data: Mr, Grame, Smith, 0411, manager, gsmith@example.com, SAU, EMD, EMPP002, MGR, Manager, PERM. The third row contains: Mr, Hansie, Cronje, 2359, employee, hcronje@example.com, SAU, EMD, EMPP002, EPM, Employee, PERM. Rows 4, 5, 6, and 7 are empty. The status bar at the bottom indicates the current cell is I28.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Prefix	First Name	Last Name	Employee Id	Role Type	Email	Business	Department	Reporting	Job Title	Position	Employment Status
2	Mr	Grame	Smith	0411	manager	gsmith@example.com	SAU	EMD	EMPP002	MGR	Manager	PERM
3	Mr	Hansie	Cronje	2359	employee	hcronje@example.com	SAU	EMD	EMPP002	EPM	Employee	PERM
4												
5												
6												
7												

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

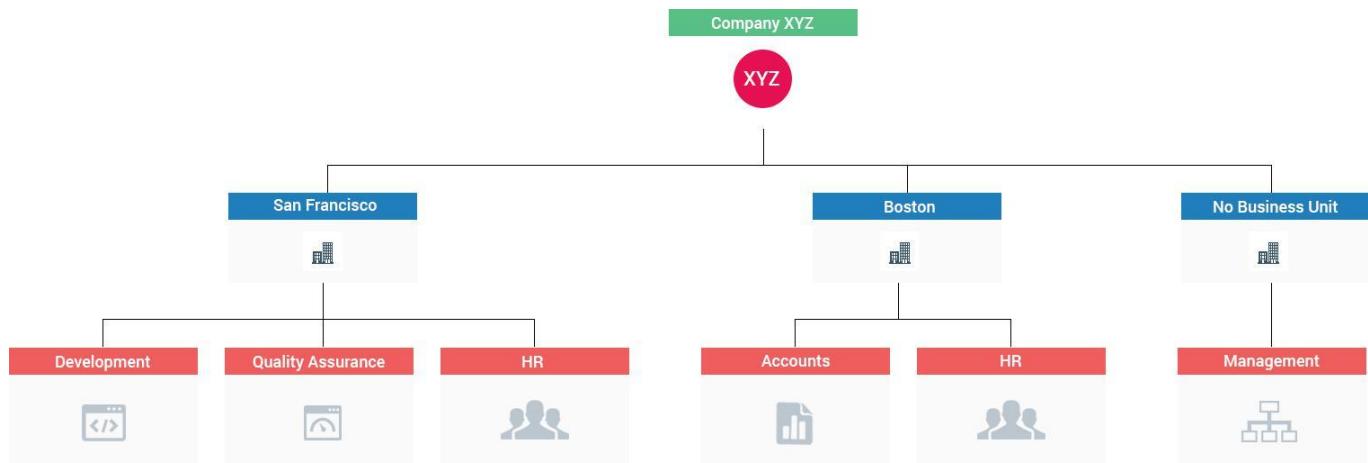
For example: <http://example.com/HRMS/index.php/cronjob>



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.

The screenshot shows the HR Management System interface with the following details:

- Header:** HR Management System, Create New, Configuration Wizard, Super Admin
- Navigation:** Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, **Organization**, Analytics, Site Config, Modules, More
- Left Sidebar:** Organization Info, Business Units (selected), Departments, Organization Structure, Organization Hierarchy, Announcements, Policy Documents, Shortcuts (with various icons).
- Current Page:** Home > Organization > Business Units
- Table:** Business Units

Action	Name	Code	Started On	Street Address	City
	Third Eye Advisory Services Pte. Limited	SIN	16 Collyer Quay #21-00, Income@Raffles, ..	Singapore	
	Third Eye Advisory Services Private Ltd ..	GUR	1227, Level 12, Tower C, Building 8, DL..	Mumbai (Bombay)	
	Third Eye Advisory Services Private Limi..	MUM	339, Level 3, Neo Vikram Building, New L..	Mumbai (Bombay)	
	3rd Eye Advisory Services Private Limite..	LKO	101A, 1st Floor, Eldeco Corporate Chambe..	Lucknow	

- Bottom:** Records per page: 20

Figure 14

- Click **Organization** in the top menu
- Click on **Business Units** on the left panel
- Click on **+Add** button on the right side

Please refer Figure 15.

The screenshot shows the 'Organization Info' section of the HR Management System. On the left, there's a sidebar with links like 'Business Units', 'Departments', 'Organization Structure', 'Organization Hierarchy', 'Announcements', 'Policy Documents', and 'Shortcuts'. The main area is titled 'Add' and contains fields for 'Name' (with a red asterisk), 'Code', 'Description', 'Started On' (with a calendar icon), 'Time Zone' (set to 'Asia/Kolkata [IST]'), 'Country' (set to 'India'), 'State' (set to 'Maharashtra'), 'City' (set to 'Mumbai (Bombay)'), 'Street Address 1' (containing '339, Level 3, Neo Vikram Building, New Link Road,'), 'Street Address 2', and 'Street Address 3'. At the bottom are 'Save' and 'Cancel' buttons.

Figure 15

- Enter the necessary details
- Click on Save button to save the Business Unit

1.5.2 Adding Departments

Please refer Figure 16.

The screenshot shows the 'Organization Info' section of the HR Management System. The left sidebar has links for 'Business Units', 'Departments' (which is selected and highlighted in blue), 'Organization Structure', 'Organization Hierarchy', 'Announcements', 'Policy Documents', and 'Shortcuts'. The main area is titled 'Departments' and shows a table with columns: Action, Name, Code, Started On, Department Head, Time Zone, and Business Unit. The table lists five departments: ITES (Headed by Rajeev Pandey), Human Resource Advisory (Headed by Vibhor Misra), Business Advisory (Headed by Vibhor Misra), Finance Advisory (Headed by Vibhor Misra), and Marketing Advisory (Headed by Vibhor Misra). There are also 'Add' and 'Edit' icons for each row. At the bottom, there's a search bar and a 'Records per page' dropdown set to 20.

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.

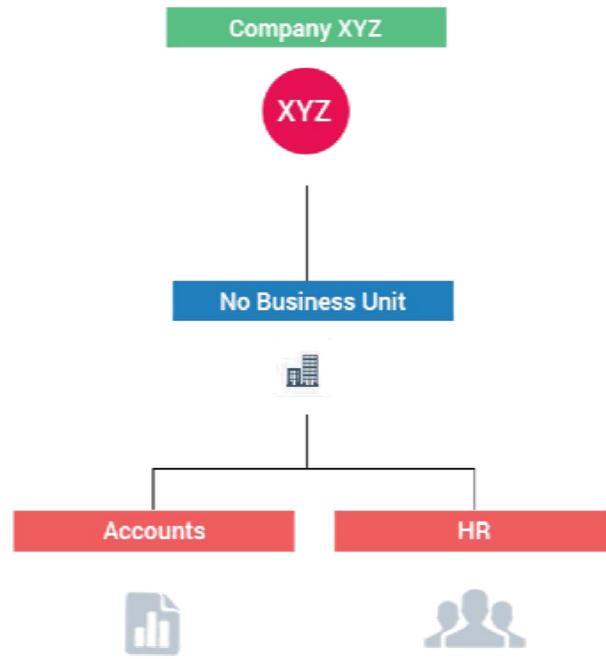
The screenshot shows the 'HR Management System' interface. The top navigation bar includes 'Create New' (dropdown), 'Configuration Wizard', and 'Super Admin'. The main menu has tabs: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization (selected), Analytics, Site Config, Modules, and More. On the left, a sidebar lists 'Business Units', 'Departments' (selected), 'Organization Structure', 'Organization Hierarchy', 'Announcements', and 'Policy Documents'. Below these are 'Shortcuts' with various icons. The central content area shows a form titled 'Home > Organization > Departments > Add'. The form fields are: 'Department Name *' (input box), 'Business Unit' (dropdown set to 'No Business Unit'), 'Department Code ? *' (input box), 'Department Head' (dropdown set to 'Select Department Head') with a 'Add Department Head' link. Below these are: 'Started On ?' (date picker), 'Time Zone *' (dropdown set to 'Asia/Kolkata [IST]') with an 'Add Time Zone' link, 'Country *' (dropdown set to 'India') with an 'Add Country' link, 'State *' (dropdown set to 'Maharashtra') with an 'Add State' link. Further down are: 'City *' (dropdown set to 'Mumbai (Bombay)') with an 'Add City' link, 'Street Address 1 *' (dropdown set to '339, Level 3, Neo Vikram Building, New Link Road,') with an 'Add Street Address' link, 'Street Address 2' (input box), and 'Street Address 3' (input box). A 'Description' text area with a character limit of 200 is shown. At the bottom are 'Save' and 'Cancel' buttons.

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 [1.5.2 Adding Departments](#)) select the option 'No Business Unit' in the Business Unit field.



Please refer Figure 18.

The screenshot shows the HR Management System interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization (which is highlighted in dark blue), Analytics, Site Config, Modules, and More. On the far right are links for Configuration Wizard, Super Admin, and a user profile icon. The left sidebar has sections for Organization Info, Business Units, Departments (selected), Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. Under 'Shortcuts', there are icons for Home, Organization, Departments, Reports, Employees, Appraisals, Recruitments, Background Checks, Analytics, Site Config, Modules, and More. The main content area shows a form titled "Home > Organization > Departments > Add". The form fields include:

- Department Name ***: An input field.
- Business Unit**: A dropdown menu set to "No Business Unit".
- Department Code ? ***: An input field.
- Department Head**: A dropdown menu set to "Select Department Head".
- Started On ?**: A date picker.
- Time Zone ***: A dropdown menu set to "Asia/Kolkata [IST]".
- Country ***: A dropdown menu set to "India".
- State ***: A dropdown menu set to "Maharashtra".
- City ***: A dropdown menu set to "Mumbai (Bombay)".
- Street Address 1 ***: An input field containing "339, Level 3, Neo Vikram Building, New Link Road,".
- Street Address 2**: An empty input field.
- Street Address 3**: An empty input field.
- Description**: A text area with placeholder text "200 characters remaining (200 maximum)".
- Save** and **Cancel** buttons at the bottom.

Figure 18

- 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.

The screenshot shows the HR Management System interface. The top navigation bar includes 'Create New' (highlighted in yellow), 'Vibhor Misra', and a dropdown menu for 'More'. The main menu has tabs for Dashboard, Self Service, Service Request, HR (selected and highlighted in black), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. A sidebar on the left lists various configuration items like Employees, Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration (which is expanded to show Job Titles, Positions, Competency Levels, Education Levels, Languages, Leave Types, Attendance Status, Bank Account Types, Identity Documents, EEOC Categories, Work Eligibility Document, Types, and Veteran Status), and Military Service Types. The central content area shows the 'Job Titles' page under 'Employee Configuration'. It has a header with 'Action', 'Job Title Code', 'Job Title', 'Job Description', 'Min Experience Required', 'Job Pay Grade Code', 'Job Pay Frequency', and 'Comments'. Below the header is a message 'No data found.' and a 'Pin to shortcuts' button. On the right side of the content area is a red '+ Add' button.

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.

The screenshot shows the HR Management System interface. The top navigation bar includes 'HR Management System', 'Create New' (with a dropdown arrow), and a user profile for 'Vibhor Misra'. Below the navigation is a blue header bar with tabs: Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. On the left, a sidebar lists various HR modules: Employees, Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration (expanded to show Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, and Job Titles), Positions, Competency Levels, Education Levels, Languages, Leave Types, Attendance Status, Bank Account Types, Identity Documents, EEOC Categories, Work Eligibility Document Types, and Veteran Status. The main content area shows the 'Job Titles' add form. The breadcrumb navigation is 'Home > HR > Employee Configuration > Job Titles > Add'. A message box at the top right says 'Pay frequency is not configured yet.' Below are input fields: 'Job Title Code' (mandatory), 'Job Title' (mandatory), 'Job Description' (with a note '200 characters remaining (200 maximum)'), 'Min Experience Required' (input field), 'Job Pay Grade Code' (mandatory), 'Job Pay Frequency' (dropdown menu with 'Select Pay Frequency' and a note 'Pay frequency is not configured yet.'), 'Comments' (input field with a note '50 characters remaining (50 maximum)'), and a 'Comments' section (input field). At the bottom are 'Save' and 'Cancel' buttons.

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.

The screenshot shows the HR Management System interface. The top navigation bar includes links for Home, Create New, Vibhor Misra, Dashboard, Self Service, Service Request, HR (which is selected and highlighted in dark blue), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. A left sidebar menu lists various HR modules: Employees, Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration (which is expanded to show Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, Job Titles, and Positions), and a general section for Job Titles and Positions. The main content area displays the 'Positions' page under 'Employee Configuration'. It features a breadcrumb trail: Home > HR > Employee Configuration > Positions. A table header with columns Action, Position, Job Title, and Description is shown, followed by a message: 'No data found.' There is also a red '+ Add' button in the top right corner.

Figure 21

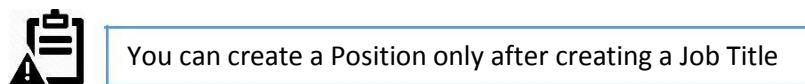
- a. Click **HR** in the top menu
- b. Click **Employee Configuration**, it will expand to give more menu items
- c. Click **Positions** in the submenu
- d. Click **+Add** button on the right side

Please refer Figure 22.

This screenshot is identical to Figure 21, showing the HR Management System interface. The top navigation bar, sidebar menu, and main content area all reflect the same state as Figure 21, specifically the 'Positions' page under 'Employee Configuration'. The table header and 'No data found.' message are present, along with the red '+ Add' button.

Figure 22

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



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.

A screenshot of the HR Management System dashboard. At the top, there is a dark blue header with the system name "HR Management System", a "Create New" button, and a user profile for "Vibhor Misra". Below the header is a navigation bar with links: Dashboard (which is highlighted in blue), Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. The main content area is titled "Shortcuts" and contains three empty rectangular boxes for widgets. A message box in the center says, "You have not configured your widgets. Click here to configure." To the right of the message are two empty boxes: one for "No birthdays today." and another for "No Announcements".

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.

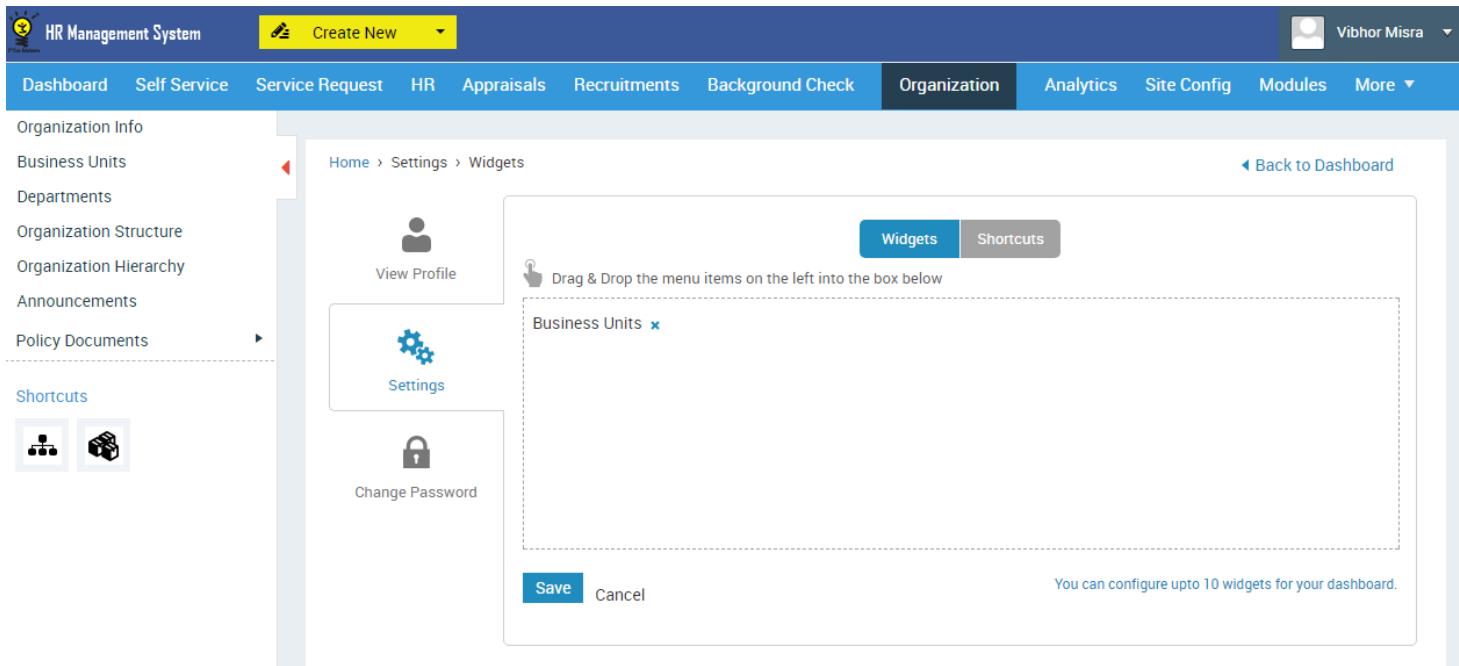


Figure 24

(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.

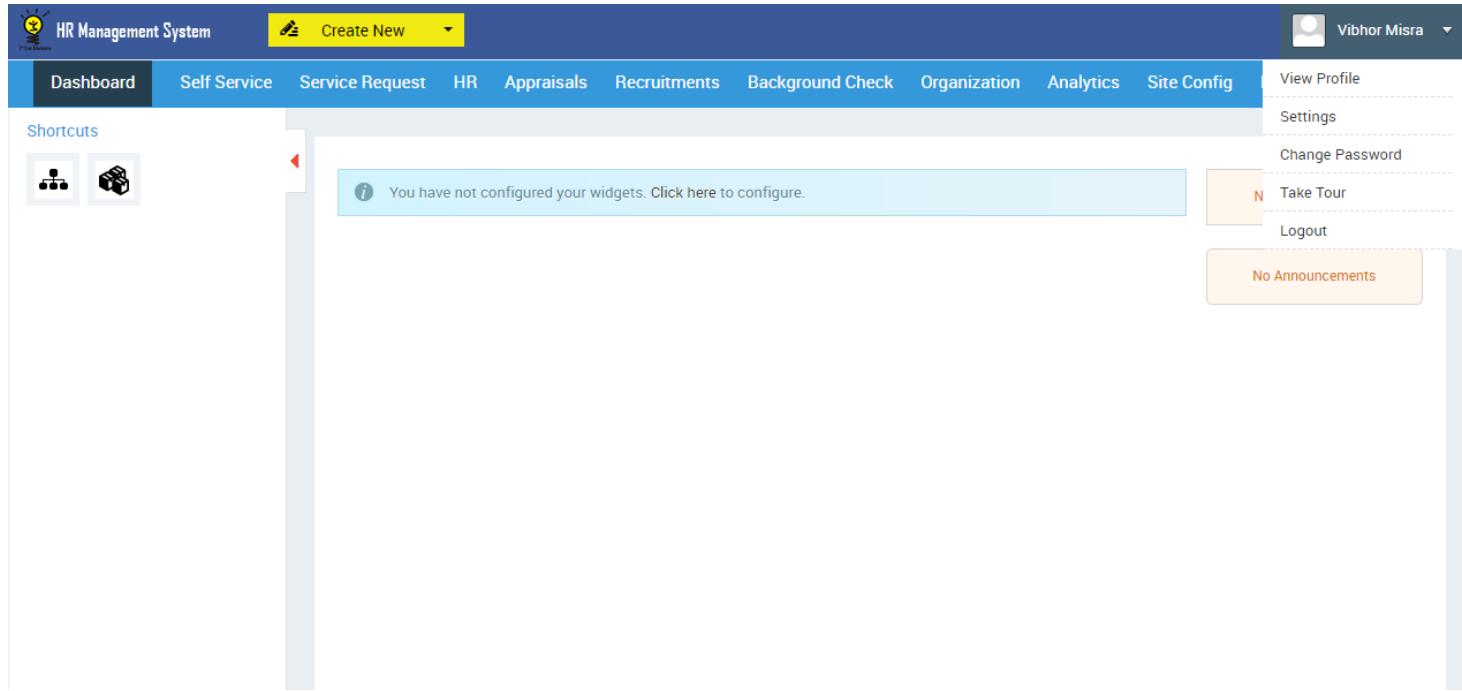


Figure 25

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.

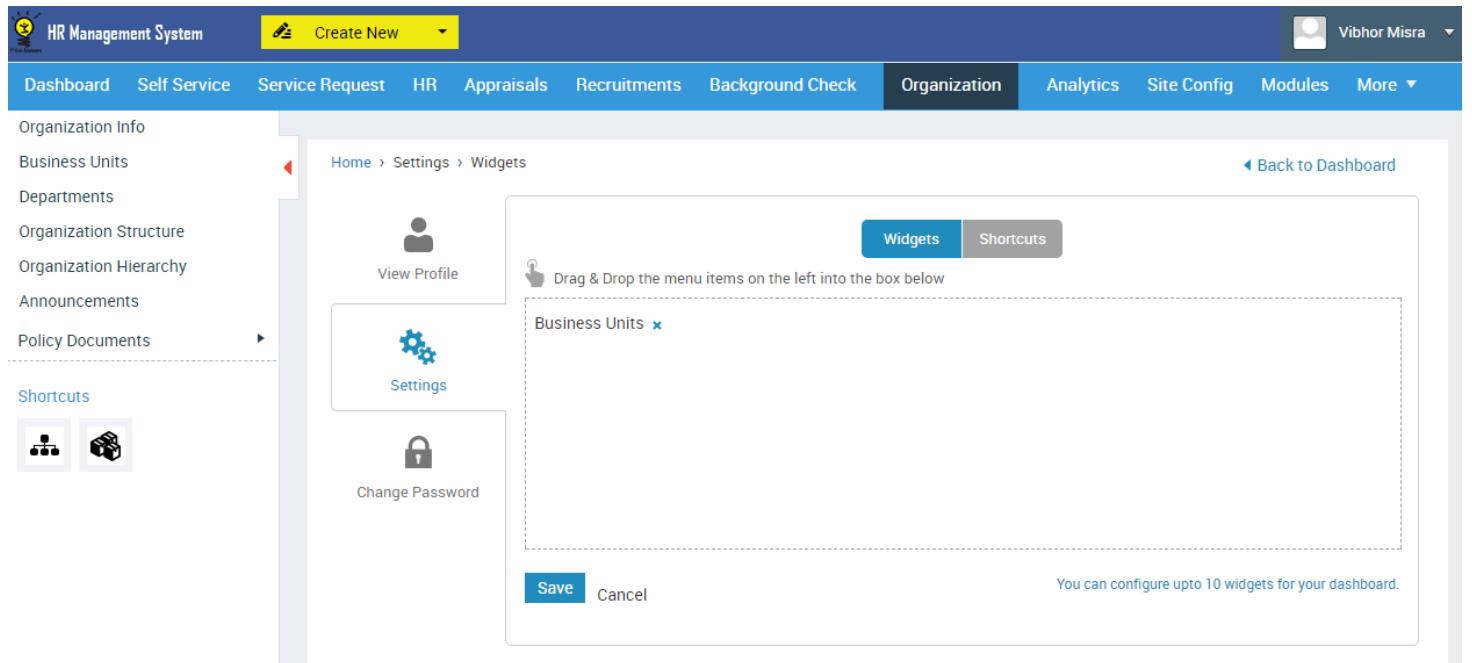
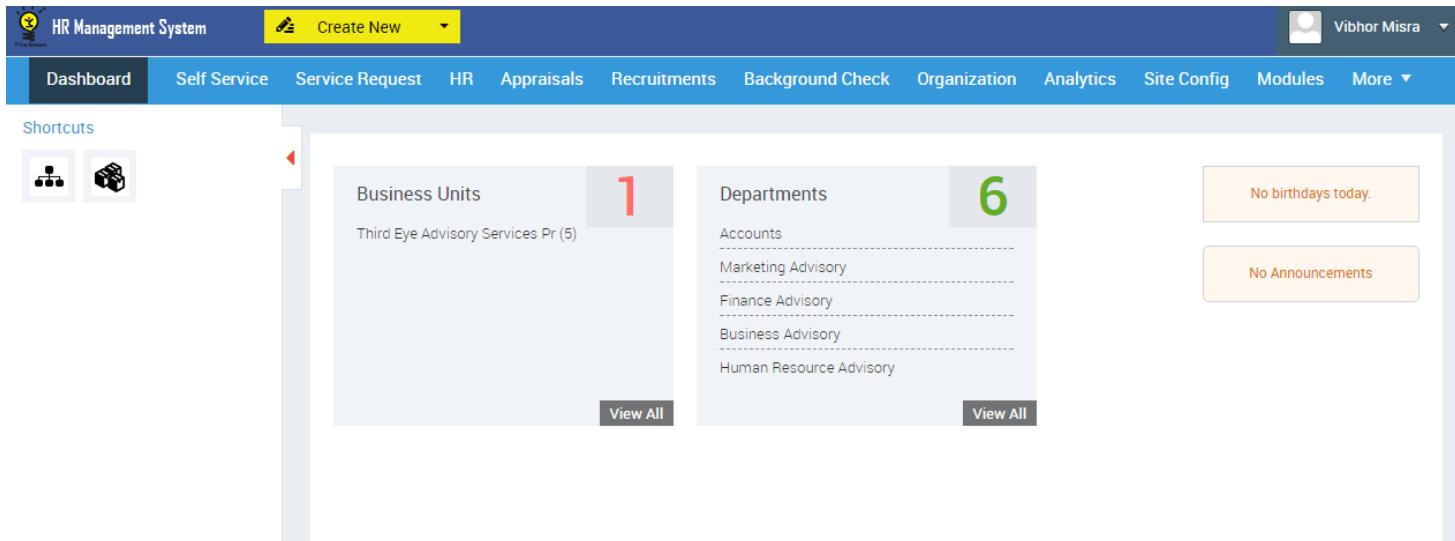


Figure 26

(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

The screenshot shows the HR Management System interface. The top navigation bar includes 'Create New' and a user profile for 'Vibhor Misra'. The main menu has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization (which is selected), Analytics, Site Config, Modules, and More. On the left, a sidebar lists Organization Info, Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements (selected), and Policy Documents. Under Announcements, there are two icons: one for organization and one for policy documents. The main content area shows a breadcrumb path: Home > Organization > Announcements. It features a table with columns: Action, Title, Description, Business Units, Departments, and Status. A message at the bottom of the table says 'No data found.' There is also a '+ Add' button on the right side.

Figure 27

- Click **Organization** in the top menu
- Click **Announcements** on the left menu panel
- Click **+Add** button on the right side

Please refer Figure 28.

The screenshot shows the 'Add Announcement' form within the HR Management System. The top navigation bar and sidebar are identical to Figure 27. The main content area shows a breadcrumb path: Home > Organization > Announcements > Add. The form has fields for 'Business Units *' (with a search icon), 'Departments *' (with a search icon), and 'Title *' (an empty input field). Below these is a rich text editor toolbar with options like Normal, Bold, Italic, Underline, etc. At the bottom of the form is a 'Upload Attachment' button. At the very bottom are three buttons: 'Post', 'Save draft', and 'Cancel'.

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.

The screenshot shows the HR Management System interface. The top navigation bar includes 'Create New' (with a dropdown arrow), 'Vibhor Misra' (profile picture and dropdown menu), and a 'More' button. The main menu has tabs: Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. A sidebar on the left is titled 'Employees' and contains sections: Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration, and Contacts. Below these are 'Shortcuts' with icons for Home, HR, Employees, and Help. The main content area shows a list of employees under 'Employees'. The first employee listed is Rajeev Kumar (Employee ID: EMPP000, Email: rajeev@3rdeyeadvisory.com). A context menu is open over his profile, showing options: 'View' (highlighted with a dashed blue border) and 'Edit'. Other employees listed are Abhishek Agrawal (Employee ID: EMPP004, Email: saurabh@3rdeyeadvisory.com) and Rajeev Pandey (Employee ID: EMPP003, Email: saurabh.3rdeyeadvisory@gmail.com). The top right of the content area has buttons for 'Import Employees', 'Import format', '+ Add', and 'Help'.

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.

The screenshot shows the HR Management System interface. The top navigation bar includes 'Create New' and a user profile for 'Vibhor Misra'. The main menu has tabs for Dashboard, Self Service, Service Request, HR (which is selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. On the left, a sidebar under 'Employees' lists Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration, and Contacts. Under 'Shortcuts', there are icons for Active and Inactive status. The main content area shows the 'Edit' screen for an employee named Mr. Rajeev Kumar (Employee Id: EMPP006). A message box says: 'The employee configurations are not yet set. Please configure them to add employee personal details.' Below this, there are sections for Personal information (Employee Name, Employee Id, Email Id, Contact Number), and for other details like Gender, Marital Status, Nationality, Ethnic Code, Race Code, Language, Date of Birth, and Blood Group. Buttons for 'Add Gender', 'Add Marital Status', 'Add Nationality', 'Add Ethnic Code', 'Add Race Code', 'Add Language', and 'Add Contact' are visible. A note at the bottom right says: 'Languages are not configured yet. Add Language'.

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.

The screenshot shows the HR Management System dashboard. At the top, there is a header bar with the system name, a 'Create New' button, and a user profile for Vibhor Misra. Below the header is a navigation menu with links to Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. A 'Shortcuts' section contains icons for Business Units and Departments. The main content area displays three cards: 'Business Units' (1 item, Third Eye Advisory Services Pr (5), View All), 'Departments' (6 items: Accounts, Marketing Advisory, Finance Advisory, Business Advisory, Human Resource Advisory, View All), and 'Birthdays Today' (Sep 06, 2017, RAJEEV, No Announcements).

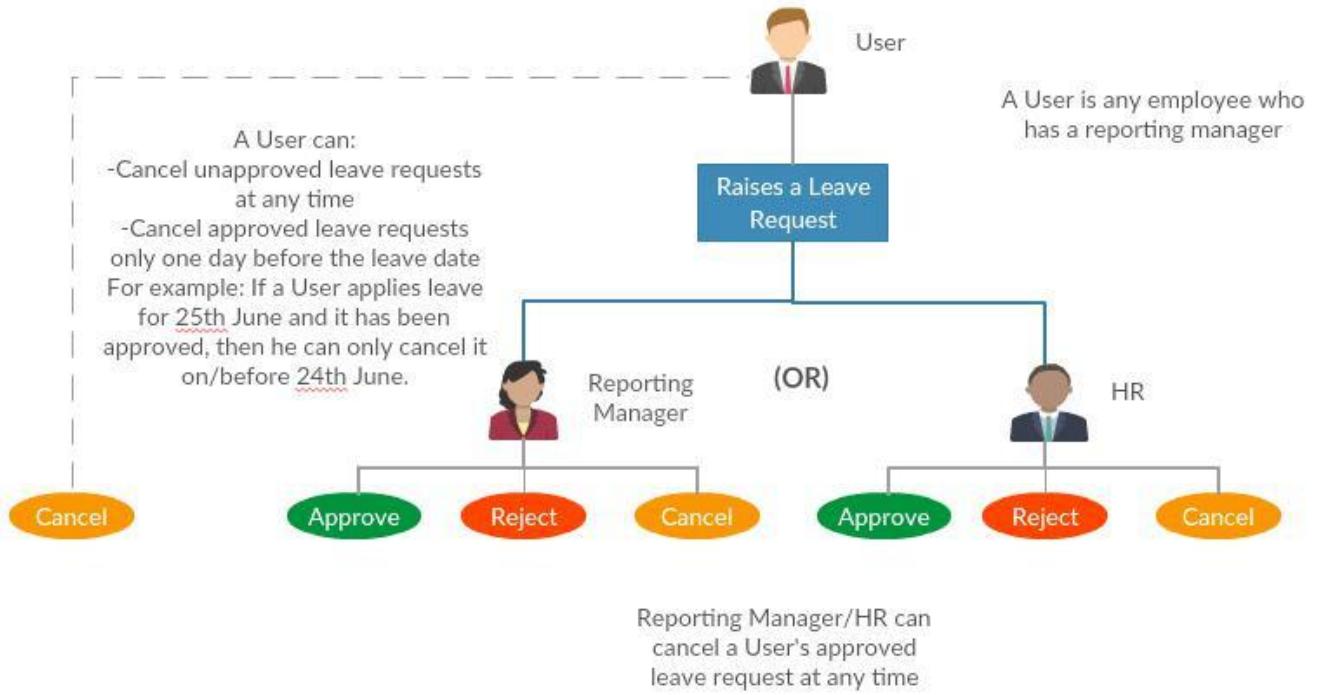
Figure 31



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.

The screenshot shows the HR Management System interface. The top navigation bar includes 'Create New', 'Vibhor Misra', and various menu items like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. The left sidebar has a tree view with 'Leave Management Options' under 'Leave Management'. The main content area displays three employee records: Rajeev Kumar (Employee ID EMPP006, Employee ITES), Abhishek Agrawal (Employee ID EMPP004, Employee Marketing Advisory), and Rajeev Pandey (Employee ID EMPP003, Employee ITES). On the right, there are buttons for 'Import Employees', 'Import format', '+ Add', and 'Help'.

Figure 32

To configure leave management options:

- Click **HR** in the top menu
- Click **Leave Management** on the left panel
- Click **Leave Management Options** in the submenu
- Click **+Add** button on the right side

Please refer Figure 33.

The screenshot shows the 'Leave Management Options' configuration page. The left sidebar has 'Leave Management Options' selected under 'Leave Management'. The main form contains the following fields:

- Business Unit:** No Business Unit (dropdown)
- Department:** Select Department (dropdown) - error message: Departments are not added yet.
- Calendar Start Month:** Select Calendar Start Mo... (dropdown) - error message: Please select calendar start month.
- Weekend day 1:** Select Weekend Start Day (dropdown) - error message: Please select weekend day 1.
- Weekend day 2:** Select Weekend End Day (dropdown) - error message: Please select weekend day 2.
- Working Hours:** (text input field)
- Half Day Requests:** Yes (dropdown)
- Allow Leave Transfers:** Yes (dropdown)
- Skip Holidays:** Yes (dropdown) - error message: Please select skip holidays.
- Hr Manager:** Select Hr Manager (dropdown) - error message: Please select hr manager.
- Description:** (text input field with character limit: 200 characters remaining (200 maximum))

At the bottom are 'Save' and 'Cancel' buttons.

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.

The screenshot shows the HR Management System interface. The top navigation bar includes 'Create New' (with a dropdown arrow), a user profile for 'Vibhor Misra', and a 'More' dropdown. The main menu bar has items: Dashboard, Self Service, Service Request, HR (which is highlighted in blue), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. On the left, a sidebar menu lists: Employees, Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration, Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, Job Titles, Positions, Competency Levels, Education Levels, Languages, Leave Types (which is expanded and selected), and Attendance Status. The central content area shows the 'Leave Types' page with a breadcrumb trail: Home > HR > Employee Configuration > Leave Types. A table titled 'Leave Types' is displayed with columns: Action, Leave Type, Number Of Days, Leave Code, Is Pre Allocated, Is Deductible, and Description. A message 'No data found.' is shown in the table body. On the right side of the content area, there are 'Pin to shortcuts' and '+ Add' buttons.

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.

The screenshot shows the HR Management System interface. The top navigation bar includes 'Create New' and a user profile for 'Vibhor Misra'. The main menu has categories like Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. A left sidebar lists various HR modules: Employees, Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration (with a dropdown arrow), Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, Job Titles, Positions, Competency Levels, Education Levels, Languages, and a selected 'Leave Types' option. The central content area shows a 'Leave Type' creation form with fields for 'Leave Type' (mandatory), 'Number of Days' (mandatory), 'Leave Short Code', 'Is Deductible' (set to 'Yes'), 'Description' (with a note of 200 characters remaining), and buttons for 'Save' and 'Cancel'. The URL in the browser is 'Home > HR > Employee Configuration > Leave Types > Add'.

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

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

Please refer Figure 36

The screenshot shows the HR Management System interface. The top navigation bar includes 'Create New' and 'Vibhor Misra'. The main menu has 'HR' selected. The left sidebar shows 'Leave Management Options' expanded, with 'Add Employee Leave' highlighted. The right panel displays the 'Add Employee Leave' page under 'Leave Management', showing a table with columns: Action, First Name, Last Name, Employee ID, Allotted Leave Limit, Used Leaves, Leave Balance, and Allotted Year. A message 'No data found' is displayed in the table body.

Figure 36

- Click **HR** in the top menu
- Click **Leave Management** in the left side panel
- Click **Add Employee Leave** in the submenu
- Click **+Add** button on the right side

Please refer Figure 37

The screenshot shows the HR Management System interface, similar to Figure 36. The left sidebar shows 'Leave Management Options' expanded, with 'Add Employee Leave' highlighted. The right panel displays the 'Add Employee Leave' page under 'Leave Management', showing search filters for 'Business Units *', 'Departments *', and 'Year *' (set to 2017). The breadcrumb path is Home > HR > Leave Management > Add Employee Leave > Add.

Figure 37

- Select the Business Unit(s)
- Select the Department(s)

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

Please refer Figure 38

The screenshot shows the HR Management System interface. The top navigation bar includes 'Create New' and a user profile for 'Vibhor Misra'. The main menu has tabs for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. A left sidebar lists 'Employees', 'Roles & Privileges', 'Holiday Management', 'Leave Management' (selected), 'Leave Management Options', 'Employee Leave Summary', 'Add Employee Leave' (with a red asterisk), 'Exit Procedure', 'Employee Configuration', 'Contacts', and 'Shortcuts' (with icons for users and roles).

The central content area shows the 'Add Employee Leave' page. It has fields for 'Business Units' (selected 'Third Eye Advisory Services Private Limited (LKO)'), 'Departments' (selected 'LKO- ITES (ITES)'), 'Year' (selected '2017'), 'Employee' (selected 'Rajeev Kumar'), and 'Leaves for 2017' (a text input field with a red border and error message 'Please enter leaves'). Below these are 'Save' and 'Cancel' buttons.

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

The screenshot shows the HR Management System interface. The top navigation bar includes 'Create New' and a user profile for 'Vibhor Misra'. The main menu has tabs for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. A left sidebar lists 'Employees' (selected), 'Roles & Privileges', 'Holiday Management', 'Leave Management' (selected), 'Leave Management Options', 'Employee Leave Summary', 'Add Employee Leave', 'Exit Procedure', 'Employee Configuration', 'Contacts', and 'Shortcuts' (with icons for users and roles).

The central content area shows the 'Employees' list page. It features a search bar with 'Select Search Category', 'Search', and 'Clear' buttons. Below the search bar are three employee profiles: 'Rajeev Kumar' (Employee ITES, ID EMPP006, Email rajeev@3rdseye advisory.com), 'Abhishek Agrawal' (Employee Marketing Advisory, ID EMPP004, Email saurabh@3rdseye advisory.com), and 'Rajeev Pandey' (Employee ITES, ID EMPP003, Email saurabh.3rdseyeadvisory@g mail.com). To the right of the profiles are buttons for 'Import Employees', 'Import format', 'Pin to shortcuts', '+ Add', and 'Help'.

Figure 39

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

Please refer Figure 40

The screenshot shows the HR Management System interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. A user profile for Vibhor Misra is visible on the right. The left sidebar under the Employees section lists Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration, and Contacts. Shortcuts for People and Documents are also present. The main content area displays employee details for Mr. Rajeev Kumar (Employee Name: Mr. Rajeev Kumar, Employee Id: EMPP006, Email Id: rajeev@3rdseye.com, Contact Number: blank). Below this, there are tabs for Official (selected), Documents, and Leave. The Leave tab shows fields for Allot Leave Limit * (empty) and Year * (2017). A sub-section for Leave lists columns: Action, Allotted Leave Limit, Used Leave, Leave Balance, and Allotted Year. A message states 'No data found'. On the far left of the main content area, there is a sidebar with links for Holidays, Salary, Personal, Contact, and a '...' button.

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

The screenshot shows the HR Management System interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (which is selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. A user profile for Vibhor Misra is at the top right. On the left, a sidebar menu under 'Employees' lists Roles & Privileges, Holiday Management, Leave Management, Leave Management Options, Employee Leave Summary, Add Employee Leave, Exit Procedure, Employee Configuration, and Contacts. Below this is a 'Shortcuts' section with icons for People and Settings. The main content area displays a list of employees: Rajeev Kumar (Employee ID EMPP006, Email rajeev@3rdelayadvisory.com), Abhishek Agrawal (Employee ID EMPP004, Email saurabh@3rdelayadvisory.com), and Rajeev Pandey (Employee ID EMPP003, Email saurabh.3rdelayadvisory@gmail.com). Each employee entry includes a profile icon, name, title, department, ID, email, and a phone icon.

Figure 41

- Click **HR** in the top menu
- Click **More Actions** icon
- Click **Edit** icon

Please refer Figure 42

The screenshot shows the HR Management System interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. A user profile for Vibhor Misra is at the top right. On the left, a sidebar menu under 'Employees' lists Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration, and Contacts. Below this is a 'Shortcuts' section with icons for People and Settings. The main content area shows an 'Edit' screen for an employee named Mr. Rajeev Kumar (Employee ID EMPP006, Email rajeev@3rdelayadvisory.com). The form includes fields for Employee Name, Employee Id, Email Id, and Contact Number. To the left of the form is a placeholder profile picture with 'Active' and 'Inactive' buttons. Below the form are sections for Official (with a 'Leave' button), Documents, and Holidays. At the bottom are 'Save' and 'Cancel' buttons. A note at the bottom of the 'Leave' section says 'Please enter leave limit for current year.'

Figure 42

- Click **Leaves** on the left menu panel (on the left side of the form)
- Enter the number of days with a **'-' sign preceding the number** for the employee
- 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:



Mail will not be sent to the HR as the HR group mail is not configured.

Please refer Figure 43

The screenshot shows the HR Management System interface. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (which is highlighted in dark blue), Modules, and More. On the far right, there is a user profile for Vibhor Misra. Below the navigation bar, on the left, is a sidebar with a tree view of site preferences: General, Ethnic Codes, Identity Codes, Gender, Time Zones, Marital Status, Prefixes, Race Codes, and Nationality Context Codes. The main content area shows the 'Email Contacts' section under 'General'. The URL in the browser is Home > Site Config > General > Email Contacts. There is a 'Pin to shortcuts' button and an '+Add' button. A message 'No data found.' is displayed in the table body.

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

The screenshot shows the HR Management System interface. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (which is selected and highlighted in dark blue), Modules, and More. On the far right, there's a user profile for 'Vibhor Misra'. Below the navigation bar, a sidebar titled 'Site Preferences' lists various categories: General (selected and expanded), Ethnic Codes, Identity Codes, Gender, Time Zones, Marital Status, Prefixes, Race Codes, and Nationality Context Codes. The main content area shows a breadcrumb path: Home > Site Config > General > Email Contacts > Add. It has fields for 'Business Unit' (set to 'Third Eye Advisory Servic...'), 'Group *' (with a dropdown menu labeled 'Select Group' and a note 'Please select group.' below it), and 'Group Email *' (empty). At the bottom are 'Save' and 'Cancel' buttons.

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:



You have not been allotted leaves for this financial year. Please contact your HR

To raise a leave request:

Please refer Figure 45

The screenshot shows the HR Management System interface. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. A user profile for Vibhor Misra is visible on the right. Below the navigation bar, a sidebar on the left lists categories such as Leaves, My Leave, Employee Leave, My Details, My Holiday Calendar, and My Team. Under Shortcuts, there are icons for People and Settings. The main content area shows a breadcrumb path: Home > Self Service > Leaves > Leave Request. A message box says, "You have not been allotted leaves for this financial year. Please contact your HR". Below this is a calendar for September 2017. A tooltip on the calendar says, "Click on a date to apply for 1 day of leave. Click and drag on the desired dates to apply for multiple days of leave." There's a search bar with placeholder "ME" and a red "Apply Leave" button. The calendar grid shows dates from 27 to 31 of September, followed by 1 and 2 of October. The date 6 is highlighted in yellow.

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

Create: Leave request

Available Leaves *

Select Leave Type

You have not been allotted leaves for this financial year. Please contact your HR.

From ? *

2017/09/06

Leave management options are not configured yet.

To ? *

2017/09/06

Leave management options are not configured yet.

Reason *

Leave For *

Full Day

Days

1

Reporting Manager *

Reporting manager is not assigned yet. Please contact your HR.

Apply Cancel

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

The screenshot shows the HR Management System interface. The top navigation bar includes 'Create New' (dropdown), 'Vibhor Misra' (profile icon), and 'More'. The main menu has tabs: Dashboard, Self Service (selected), Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. On the left, a sidebar under 'Leaves' lists: Leave Request (selected), My Leave, Employee Leave, My Details, My Holiday Calendar, and My Team. Under 'Shortcuts', there are icons for People and Settings. The central content area shows 'Home > Self Service > Leaves > My Leave'. It displays summary counts: All 0, Pending Leaves 0, Cancel Leaves 0, Approved Leaves 0, and Rejected Leaves 0. Below is a table titled 'My Leave' with columns: Action, Leave Type, Reason, From Date, To Date, Days, and Applied On. A message at the bottom says 'No data found.'

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

The screenshot shows the Self Service module interface. The top navigation bar includes Dashboard, Self Service (which is highlighted in red), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. On the left, a sidebar under Leaves lists Leave Request, My Leave (highlighted with a red box and labeled 'b'), Employee Leave, My Details, My Holiday Calendar, My Team, and Shortcuts. The main content area shows a summary of leave status: Pending Leaves (1), Cancel Leaves (0), Approved Leaves (0), Rejected Leaves (0), and All (1). Below this is a table titled 'My Leave' with columns for Action, Leave Type, Reason, From Date, To Date, Days, and Applied On. One row is visible, showing an action icon (with a red box and labeled 'c') for a Sick leave application from 2016-Sep-13 to 2016-Sep-13, lasting 1.0 day and applied on 2016-Sep-07. At the bottom are 'C P' and 'Records per page 20' buttons.

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

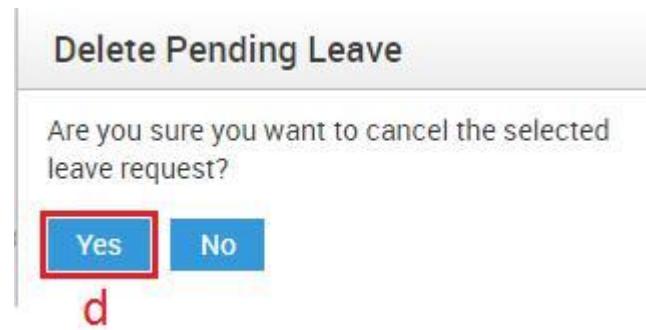


Figure 49

- 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

The screenshot shows the 'Employee Leave' section of the 'Leaves' module. The left sidebar has 'Employee Leave' selected. The main area displays a table with columns: Action, Employee, Leave Type, From, To, Days, and Applied On. One row is shown for 'Jim Carol' with 'Sick' leave type from '06.09.2016' to '07.09.2016' for '2.0' days applied on '20.09.2016'. Buttons for 'C' (Cancel) and 'P' (Print) are at the bottom left, and a dropdown for 'Records per page' is at the bottom right.

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

The screenshot shows a 'Leave Request' dialog box. At the top left is a status dropdown labeled 'd' containing 'Cancel'. To its right is a 'Comments' text area with a character limit of 50. Below these is a large blue 'SAVE' button with a red border and the letter 'e' next to it. The main body of the dialog contains a table with the following data:

Employee	Jim Carol	Leave Type	Sick
From	06.09.2016	To	07.09.2016
Leave For	Full Day	Days	2.0
Approved On	20.09.2016	Comments	

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

Action	Employee	Leave Type	From	To	Days	Leave Status
	Jim Carl	General	2017-02-06	2017-02-07	2.0	Pending for approval

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

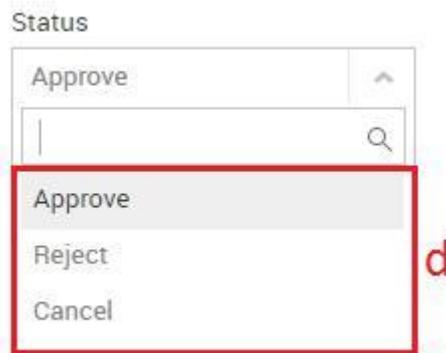


Figure 53

- 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

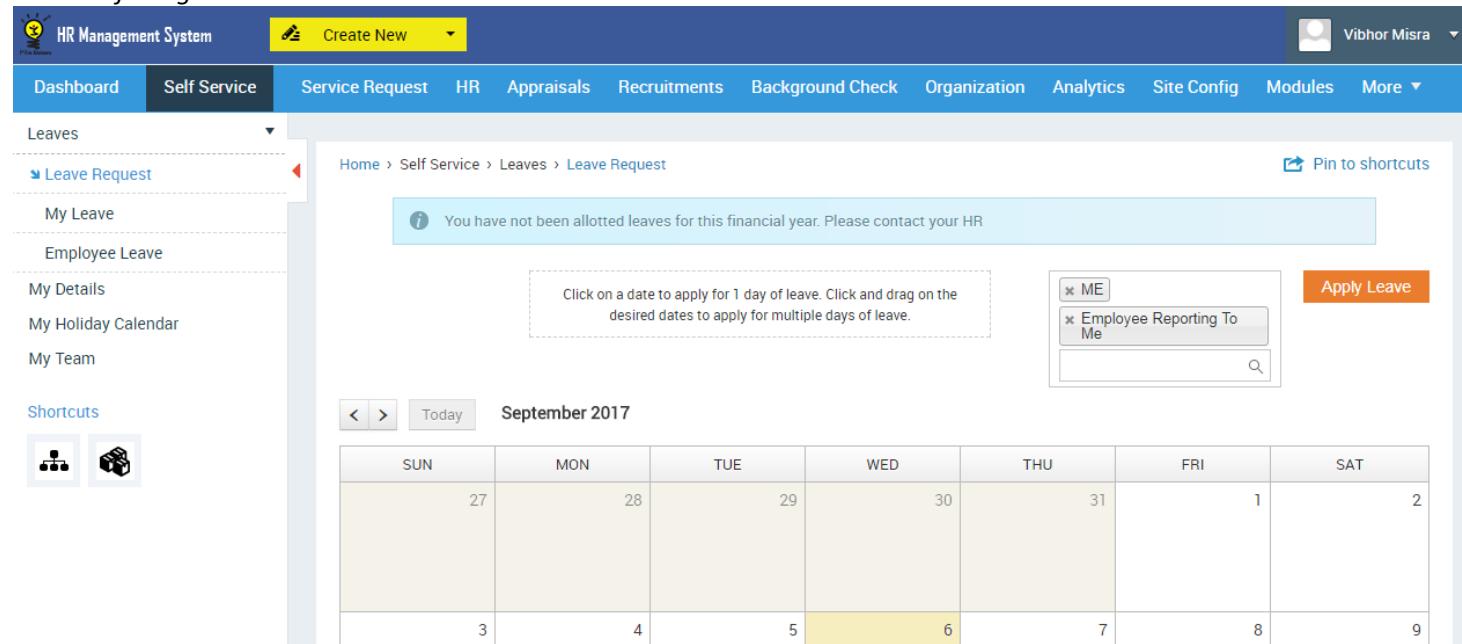


Figure 54

- 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

September 2016

SUN	MON	TUE	WED	THU	FRI	SAT
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

Hans Cronje, Leave (A)

Click here

Leaverequest

Status: Cancel

Comments: 50 characters remaining (50 maximum)

SAVE

Employee	Hans Cronje	Leave Type	Sick
From	2016-09-13	To	2016-09-14
Leave For	Full Day	Days	2.0
Approved On	2016-Sep-07	Comments	

Figure 55

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

Please refer Figure 56

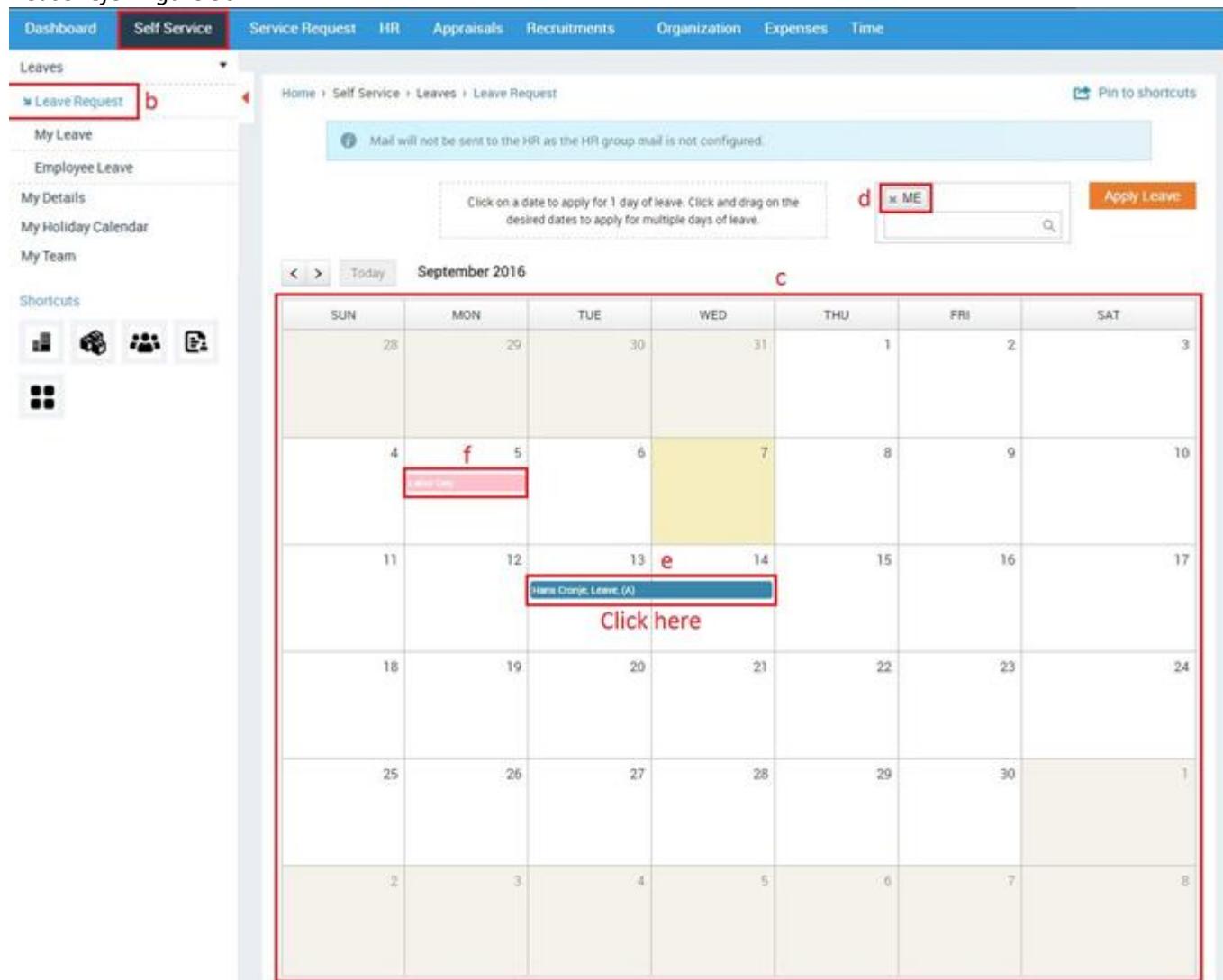


Figure 56

- 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

The screenshot shows the 'Self Service' tab selected in the top navigation bar. On the left, a sidebar menu includes 'Leave Request' under 'Leaves', 'My Leave', 'Employee Leave', 'My Details', 'My Holiday Calendar', 'My Team', and 'Shortcuts'. The main content area displays a summary of leave requests with a red border around the category counts: Pending Leaves (0), Cancel Leaves (1), Approved Leaves (1), Rejected Leaves (0), and All (2). Below this is a table titled 'My Leave' with columns for Action, Leave Type, Reason, From Date, To Date, Days, and Applied On. A message 'No data found' is shown in the table body.

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.

The screenshot shows the 'Self Service' tab selected in the top navigation bar. The sidebar menu is identical to Figure 57. The main content area shows a detailed view of a leave request with a red border around the table rows. The table has four columns: Available Leaves (10), Reason (Personal work), Leave Type (Personal), and From Date (2016-12-06). Below this is a section titled 'LEAVE REQUEST HISTORY' with two entries: 'Leave Request has been Approved by Micheal Mi' (date: 2016-12-22 03:08 AM) and 'Leave Request has been sent for Manager Approval by Jenny JJ' (date: 2016-12-19 04:45 AM).

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

The screenshot shows the HR Management interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar has sections for Employees, Roles & Privileges, Holiday Management (highlighted with a red box), Manage Holidays, Leave Management, and Exit Procedure. Under Holiday Management, 'Manage Holiday Group' is selected (highlighted with a red box). The main content area is titled 'Manage Holiday Group' and displays a table with one row. The table columns are Action, Group Name, and Description. The row contains a set of icons, 'Group A', and 'Holiday group for the employees working ..'. At the bottom right of the table is a dropdown for 'Records per page' set to 20. On the far right of the content area are 'Pin to shortcuts' and '+ Add' buttons. A red letter 'a' is placed above the HR link in the top menu, 'b' is placed over the Holiday Management link in the sidebar, 'c' is placed over the Manage Holiday Group link in the sidebar, and 'd' is placed over the +Add button.

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

The screenshot shows the HR Management interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar has sections for Employees, Roles & Privileges, Holiday Management (highlighted with a red box), Manage Holidays, Leave Management, and Exit Procedure. Under Holiday Management, 'Manage Holiday Group' is selected. The main content area is titled 'Manage Holiday Group' and shows a form for adding a new group. It has fields for 'Group Name' (with a red box) and 'Description' (with a red box). Below the form are 'SAVE' and 'Cancel' buttons. A large red bracket labeled 'e' covers the 'Group Name' and 'Description' fields, and a red box labeled 'f' covers the 'SAVE' button.

Figure 59

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

3.12 How do I create Holidays?

Please refer Figure 60

The screenshot shows the HR module interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar menu lists Employees, Roles & Privileges, Holiday Management (highlighted with a red box), Manage Holiday Group, *Manage Holidays (highlighted with a red box and labeled 'b'), Leave Management, and Exit Procedure. The main content area displays the 'Manage Holidays' page with a table showing a single record: Labor Day, ORB, 2016-Sep-05, and a description stating 'This day is declared as a Labor holiday.' A red box labeled 'c' highlights the 'Manage Holidays' link in the sidebar. A red box labeled 'd' highlights the '+Add' button in the top right of the main content area. A red bracket labeled 'a' covers the top navigation bar.

Figure 60

- Click **HR** in the top menu
- Click **Holiday Management** on the left menu panel
- Click **Manage Holidays** in the submenu
- Click **+Add** button

Please refer Figure 61

The screenshot shows the 'Add Holiday' page. The top navigation bar is identical to Figure 60. The sidebar menu shows the same options, with 'Manage Holidays' highlighted. The main form has fields for 'Holiday*', 'Holiday Group*', 'Date*', and 'Description'. A red box labeled 'e' covers the entire right side of the form. A red box labeled 'f' highlights the 'Add Holiday Group' link next to the 'Holiday Group*' field. A red box labeled 'g' highlights the 'SAVE' button at the bottom left of the form.

Figure 61

- Enter the required details
- Add a new Holiday Group
- 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

The screenshot shows the HR module's Employees list. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (highlighted in red), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. The left sidebar has sections for Employees (selected), Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration, and Contacts. Shortcuts are also listed. The main content area displays a list of employees with their names, roles, and contact information. Jim Carl is selected, and his profile card is shown with options to View, Edit (highlighted with a red box), and Delete. Other employees listed include Anderson Neo Manager, Ruby Jackson Employee, and Johny Rodhes Manager.

Figure 62

- Click **HR** in the top menu
- Click **More Actions** button in the Action column
- Click **Edit** icon

Please refer Figure 63

The screenshot shows the HR module's Employee Edit screen. The top navigation bar is identical to Figure 62. The left sidebar shows the same sections. The main content area is titled "Edit" and shows the details for Mr. Jim Carol, including Employee Name, Employee Id, Email Id, and Contact Number. Below this, there are tabs for Official, Documents, Leaves, Holidays (highlighted with a red box), Salary, and Personal. A modal dialog is open over the Leaves section, asking for a "Holiday Group Name". It contains a dropdown labeled "Select Holiday Group" and a "Add Holiday Group" button. The "Holidays" tab is highlighted with a red box, and the "Leave Group" field is also highlighted with a red box.

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

The screenshot shows the HRMIS application interface. On the left, there is a sidebar with various menu items under 'Employees' and 'Shortcuts'. The main content area shows an employee profile for 'Mr. John Michael' with details like Employee Id (Empp201) and Email Id (john54321@mailinator.com). Below this, a modal window is open for creating a new Holiday Group. The 'Holidays' tab is selected. The 'Holiday Group Name' field contains 'Group A'. The 'SAVE' button is highlighted with a red box and labeled 'h'. In the background, a grid titled 'Group A - Holidays' is visible, showing one record: 'Group A' for 'Labor Day' on '2016-Sep-05' with the description 'This day is declared as a Labor holiday'. The grid has columns for Action, Holiday Group, Holiday, Date, and Description.

Action	Holiday Group	Holiday	Date	Description
	Group A	Labor Day	2016-Sep-05	This day is declared as a Labor holiday.

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

The screenshot shows the 'Self Service' application interface. At the top, there is a navigation bar with links: Dashboard, Self Service (which is highlighted in red), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. On the left, a sidebar menu includes 'Leaves', 'My Details' (which is highlighted in red and has a small letter 'b' next to it), 'My Holiday Calendar', and 'My Team'. Below these are 'Shortcuts' with icons for Home, Search, and other applications. The main content area displays the 'My Details' page. It features a profile picture placeholder, followed by four data fields: Employee Name (Mr. Hans Cronje), Employee Id (Empp203), Email Id (hans54321@mailinator.com), and Contact Number (* Add). The URL in the browser is 'Home > Self Service > My Details'. There is also a 'Unpin from shortcuts' link in the top right corner.

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

The screenshot shows the 'Self Service' tab selected in the top navigation bar. On the left, there's a sidebar with 'Leaves', 'My Details' (which is currently selected), 'My Holiday Calendar', and 'My Team'. Below these are 'Shortcuts' with icons for Home, My Details, Leaves, Holidays, Team, and a grid icon. The main content area displays 'My Details' with a profile picture placeholder. Below it is a table of official details:

Official	Employee Code	Prefix	Mr
Documents	empp203		
Leaves	Hans	Last Name	Cronje
Salary	Mode of Employment		
Personal	Direct		
Contact	Role	Email	hans54321@mailinator.com
Skills	Business Unit	Department	InformationTechnology
Job History	Orange Blossom		
Experience	Reporting Manager		
Education	Grame Smith	Position	
Training & Certification	Job Title		
Medical Claims	Software Engineer		
Disability	Employment Status		
Dependency	Full Time		
Visa and Immigration	Date of Joining		
Corporate Card	2013-Jul-10		
Work Eligibility	Years of Experience	Work Telephone Number	123456780
Additional Details	2		
Asset Details	Extension	Fax	4012345679

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

The screenshot shows a web-based self-service portal. At the top, there is a navigation bar with links: Dashboard, Self Service (which is highlighted in black), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time.

The main content area has a sidebar on the left with the following sections:

- Leaves
- My Details (selected)
- My Holiday Calendar
- My Team
- Shortcuts
 - Leaves
 - Salary
 - Personal
 - Contact
 - Skills
 - Job History
 - Experience
 - Education
 - Training & Certification
 - Medical Claims
 - Disability
 - Dependency
 - Visa and Immigration
 - Corporate Card
 - Work Eligibility
 - Additional Details
 - Asset Details

The main panel displays the following information:

- Employee Name: Mr. Hans Cronje
- Employee Id: EmpP203
- Email Id: hans54321@mailinator.com
- Contact Number: + Add

Below this, there is a section titled "Official" with a "Documents" tab selected. Other tabs include "Certificates" and "Attachment(s)". There are buttons for "Edit", "Delete", and "Download". A "New Document" button is located in the top right corner of this section.

Figure 67

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

Leaves

Please refer Figure 68

The screenshot shows the 'Self Service' tab selected in the top navigation bar. On the left, a sidebar lists various employee details and shortcuts. The main content area displays the 'Employee Leaves' section, which includes a summary table with employee information and a grid view of leave details.

Employee Details:

Employee Name	: Mr. Hans Cronje
Employee Id	: Empp203
Email Id	: hans54321@mailinator.com
Contact Number	: + Add

Employee Leaves Grid:

Action	Allotted Leave Limit	Used Leaves	Leave Balance	Allotted Year
a	20	2	18	2016

Grid Actions: C P
Records per page: 10

Left Sidebar (Leaves category):

- Official
- Documents
- Leaves** (selected)
- Salary
- Personal
- Contact
- Skills
- Job History
- Experience
- Education
- Training & Certification
- Medical Claims
- Disability
- Dependency
- Visa and Immigration
- Corporate Card
- Work Eligibility
- Additional Details
- Asset Details

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

The screenshot shows a user interface for managing personal details. At the top, there's a navigation bar with links: Dashboard, Self Service (which is highlighted in blue), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. Below this is a sidebar with sections: Leaves, My Details (which is expanded to show sub-options: My Holiday Calendar, My Team), and Shortcuts (with icons for People, Star, Document, and Email). The main content area shows the current page path: Home > Self Service > My Details > Salary Details. It features a profile picture placeholder and a table of salary information. On the left, a sidebar lists various categories: Official, Documents, Leaves, Salary (which is selected and highlighted in blue), Personal, Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, Work Eligibility, Additional Details, and Asset Details.

Employee Name	Mr. Hans Cronje		
Employee Id	Empp203		
Email Id	hans54321@mailinator.com		
Contact Number	+ Add		
Salary Currency	US Dollar USD	Pay Frequency	Monthly
Salary	64000	Bank Name	UCO
Account Holder Name	Hans Cronje	Account Holding Since	2011-Sep-07
Account Class Type	Salaried	Account Type	Savings
Account Number	01102011050018045454		

Figure 69

You can view your salary and account details.

Personal

Please refer Figure 70

The screenshot shows the 'Self Service' tab selected in the top navigation bar. The main content area displays 'Personal Details' under 'My Details'. On the left, a sidebar lists various categories: Leaves, My Holiday Calendar, My Team, Shortcuts (with icons for Home, Work, and Personal), and a list of personal details like Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, Work Eligibility, Additional Details, and Asset Details. The 'Personal' category is currently selected. In the center, there is a summary box with an employee profile picture and the following details:
Employee Name : Mr. Hans Cronje
Employee Id : Empp203
Email Id : hans54321@mailinator.com
Contact Number : + Add

Below this is a table with columns for Gender, Marital Status, Nationality, Ethnic Code, Race Code, Language, Date of Birth, and Blood Group. The 'Training & Certification' section contains an 'EDIT' button, which is highlighted with a red box and labeled 'a'.

Gender	...	Marital Status	...
Nationality	...	Ethnic Code	...
Race Code	...	Language	...
Date of Birth	...	Blood Group	...

Figure 70

- 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

The screenshot shows the SAP Fiori interface for 'Self Service'. The top navigation bar includes 'Dashboard', 'Self Service' (which is highlighted with a red box), 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. On the left, a sidebar has 'Leaves', 'My Details', 'My Holiday Calendar' (highlighted with a red box and labeled 'b'), 'My Team', and 'Shortcuts'. The main content area is titled 'My Holiday Calendar' and displays a table with columns: Action, Holiday, Date, and Description. One row is shown: 'C' (with a view icon), 'Labor Day', '2016-Sep-05', and 'This day is declared as a Labor holiday.' There are also 'Records per page' and a dropdown set to '20'.

Figure 71

- Click **Self Service** in the top menu
- Click **My Holiday Calendar** on the left menu panel
- 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

The screenshot shows the SAP Fiori interface for 'Self Service'. The top navigation bar includes 'Dashboard', 'Self Service' (highlighted with a red box), 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses', and 'Time'. On the left, a sidebar has 'Leaves', 'My Details', 'My Holiday Calendar', 'My Team' (highlighted with a red box and labeled 'b'), and 'Shortcuts'. The main content area is titled 'My Team' and displays a table with columns: Action, First Name, Last Name, Email, Employee ID, and User Status. One row is shown: 'C' (with a view and edit icon), 'Hans', 'Cronje', 'hans54321@mailinator.com', 'empp203', and 'Active'. There are also 'Records per page' and a dropdown set to '20'.

Figure 72

- Click **Self Service** in the top menu
- 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

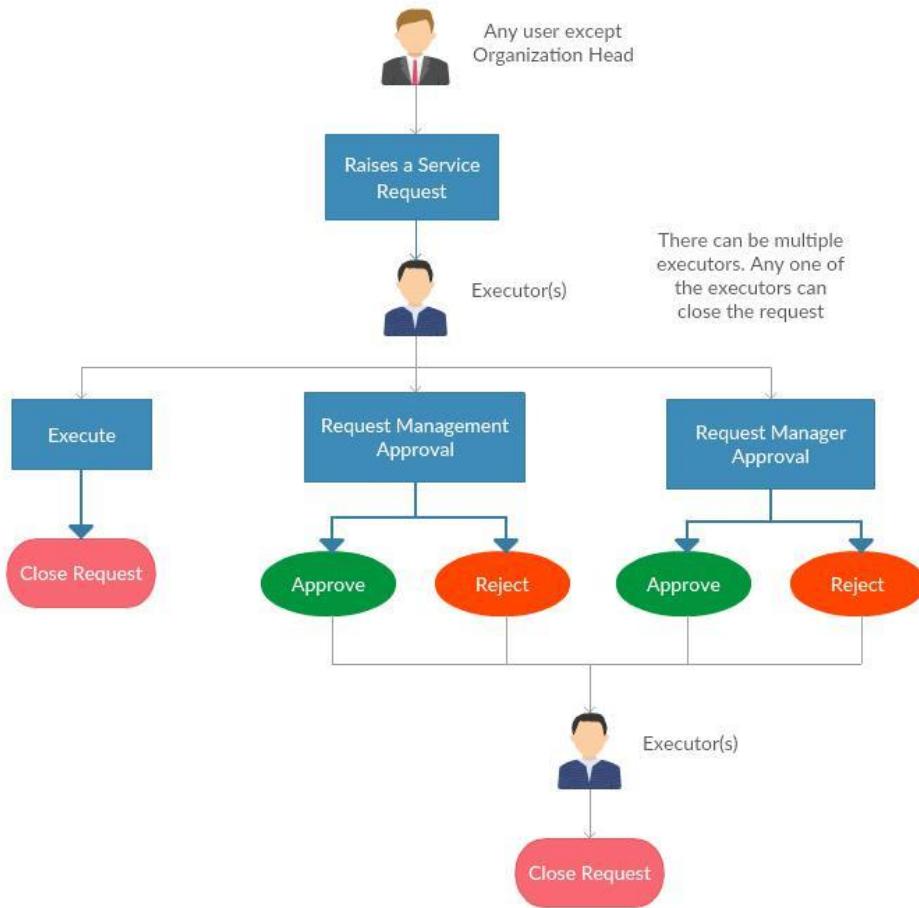
- d. Click **View/Edit** icon to view or edit employee details



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

The screenshot shows a software interface for managing service request categories. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar has sections for Configuration (selected), Categories (highlighted with a red box, labeled 'b'), Request Types, and Settings. A 'Shortcuts' section contains icons for users, search, and export. The main content area is titled 'Categories' and lists one item: 'Internet'. There are columns for Action, Category, and Description. On the right, there are buttons for Pin to shortcuts, Add (labeled 'd'), and a refresh icon. Below the table are buttons for Export and Print. At the bottom, there's a Records per page dropdown set to 20.

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

The screenshot shows a 'Create New Category' dialog box. It has fields for 'Category *' and 'Description'. A note says '200 characters remaining (200 maximum)'. At the bottom are 'SAVE' and 'Cancel' buttons. A large red bracket 'e' covers the right side of the dialog. A small red box 'f' highlights the 'SAVE' button.

Figure 74

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

5.2 How do I create Service Request Types?

Please refer Figure 75

The screenshot shows a software interface for managing service request types. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The 'Service Request' tab is active. On the left, a sidebar has 'Configuration' selected, with 'Request Types' highlighted. The main content area is titled 'Request Types' and lists one item: 'Internet' under 'Category' with 'Change' as the 'Request Type'. A toolbar at the bottom right includes 'Records per page' set to 20, and icons for Group, Print, and Refresh. A red bracket labeled 'd' points to the '+Add' button in the top right corner.

Figure 75

- Click on the Service Request in the top menu
- Click **Configuration** on the left side panel
- Click **Request Type** submenu
- Click **+Add** button on the right side

Please refer Figure 76

The screenshot shows the 'Add' form for a new service request type. The top navigation bar and sidebar are identical to Figure 75. The main form has fields for 'Category' (with a dropdown menu and 'Add Category' link), 'Request Type' (text input field), and 'Description' (text input field with character count validation). A red bracket labeled 'e' points to the 'Category' field. A red box labeled 'f' surrounds the 'ADD NEW REQUEST' button. A red box labeled 'g' surrounds the 'SAVE' button.

Figure 76

- Enter the Required details
- Click ADD NEW REQUEST to add more requests in the same category
- Click **SAVE** button

5.3 How do I configure Service Request settings?

Please refer Figure 77

The screenshot shows the Service Request Settings page. The top navigation bar includes links for Dashboard, Self Service, Service Request (highlighted in red), HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar has a Configuration section with sub-options: Categories, Request Types, and Settings (also highlighted in red). The main content area is titled 'Settings' and contains a table with columns: Action, Business Unit, Department, Applicability, Request For, Category, Attachment, and Description. A single row is visible with the values: Action (orange blossom), Business Unit (Orange Blossom), Department (No department), Applicability (Business Unit wise), Request For (Service), Category (Internet), Attachment (Yes). Below the table are buttons for 'Pin to shortcuts', '+Add' (highlighted in red), and 'C.P.'. At the bottom are icons for user, search, and export, along with a 'Records per page' dropdown set to 20.

Figure 77

- Click **Service Request** in the top menu
- Click **Configuration** left menu panel
- Click **Settings** in the submenu
- Click **+Add** button on the right side

Please refer Figure 78

The screenshot shows the 'Add' page for Service Request Settings. The top navigation bar and sidebar are identical to Figure 77. The main form has fields for Business Unit (Select Business Unit), Applicability (radio buttons for 'Business unit wise' and 'Department wise' - 'Business unit wise' is selected), Request For (Service), Category (text input), No. of Approvers (Select No. Of Approvers), Attachment (radio buttons for 'Yes' and 'No' - 'No' is selected), Description (text area with character limit of 200), Executors (text input), and Request Viewers (text input). A large red bracket labeled 'e' covers the right side of the form. A red arrow labeled 'f' points to the 'SAVE' button at the bottom left of the form.

Figure 78

- Enter the Required details
- 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

The screenshot shows the Service Request module interface. At the top, there is a navigation bar with tabs: Dashboard, Self Service, Service Request (which is highlighted), HR, Appraisals, Recruitments, Organization, Expenses, and Time. Below the navigation bar, on the left, is a sidebar titled "My request summary" with a dropdown menu. The sidebar lists categories: All (1), Open (1), Closed (0), Rejected (0), and Cancelled (0). To the right of the sidebar is a main content area titled "My request summary". It displays a table with columns: Ticket#, Request For, Category, Request Type/Asset Name, Priority, Description, Raised By, Raised On, and Status. One row is visible: SD0001, Service, Internet, Change, High, Tst, Jim jazz, 09/07/2016, Open. At the bottom of the main content area, there is a "Records per page" dropdown set to 20. On the far right of the main content area, there is a red box labeled "c" containing a "+ Raise a Request" button and some icons. A red box labeled "a" is positioned above the sidebar, and another red box labeled "b" is positioned above the "My request summary" title.

Figure 79

- Click **Service Request** in the top menu
- Click **My request summary** on the left side panel
- Click **+Add** button on the right side

Please refer Figure 80

The screenshot shows the "Add" form for a service request. At the top, there is a navigation bar with tabs: Dashboard, Self Service, Service Request (which is highlighted), HR, Appraisals, Recruitments, Organization, Expenses, and Time. Below the navigation bar, on the left, is a sidebar titled "My request summary" with a dropdown menu. The sidebar lists categories: All (1), Open (1), Closed (0), Rejected (0), and Cancelled (0). In the center of the screen, there are four input fields: "Request For" (set to "Service"), "Category" (dropdown menu), "Request Type" (dropdown menu), and "Priority" (dropdown menu). Below these fields is a text area labeled "Description" with a placeholder "200 characters remaining (200 maximum)". At the bottom of the form, there is a red box labeled "e" containing a "SAVE" button and a "Cancel" link. A large red bracket labeled "d" is positioned on the right side of the form, covering the "Category", "Request Type", "Priority", and "Description" fields.

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

C	Ticket#	Request For	Category	Request Type/Asset Name	Priority	Description	Raised By	Raised On	Status
c	SD0001	Service	Internet	Change	High	Tst	Jim jazz	09/07/2016	Open

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

The screenshot shows a service request interface. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time. Below this is a sidebar titled 'My request summary' with categories: All (1), Open (1), Closed (0), Rejected (0), and Cancelled (0). There are also 'Shortcuts' and a user icon. The main content area shows a request details grid:

Status	Management approved	Ticket	SD0001
Category	test	Request Type	Internet
Priority	High	Description	tst
Request For	Service	Raised On	09/07/2016

Below this is a 'Raised by' section:

Employee Name	Jim jazz	Employee ID	empp205
Reporting Manager	Grame Smith	Approver 1	Jadagish MM
Executors	Hans Cronje		

At the bottom, a red box highlights the 'REQUEST HISTORY' section, which contains three entries:

- Internet Request has been approved by Jadagish MM
Comment: Approved.
09/09/2016 07:59 AM
- Internet Request has been sent for management approval by Hans Cronje
Comment: Need your Approval.
09/09/2016 07:59 AM
- Desktop Request has been raised by Jim jazz
09/07/2016 02:09 AM

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

My request summary

My action summary

All 2

Open 1

Pending 1

Closed 0

Rejected 0

Cancelled 0

Due today 0

Overdue 0

Sent for approval 0

a

b

c

d

Home > Service Request > My Action Summary > Open

My action summary

Ticket#	Request For	Category	Request Type/Asset Name	Priority	Description	Raised By	Raised On
SD0003	Service	Internet	Change	High	It should be faster.	Jim jazz	09/09/2016

Records per page 20

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

The screenshot shows a ServiceNow interface for a service request. At the top, there's a navigation bar with tabs like 'Dashboard', 'Service Catalog', 'Search > Req. Rec.', 'List', 'Approvals', 'Inbox/Queue', 'Open/Close', 'Logistics', and 'Ticket'. Below the navigation is a sidebar with sections for 'My Request Summary' (status dropdown), 'Request Status' (dropdown with options: All, Open, Pending, Closed, Reopened, Cancelled, Drafting, Overdue, Not In Progress), and 'Attachments' (with icons for file types). The main content area has a title 'Home - Service Catalog - My Work - Current Case'. It displays several buttons at the top right: 'e. Close request' (blue), 'f. Management Approved' (grey), and 'g. Manager Approval' (grey). A dropdown menu labeled 'e1' is open under 'e. Close request'. Below these are sections for 'Request Details' (Status: Open, Category: ITIL, Priority: High, Request ID: SCR1234567890) and 'Defined by' (Requester Name: John Doe, Reporting Manager: Grandpa Smith, Location: Home Office). On the right, there's a 'REQ. HIST. HISTORY' section with a dropdown menu containing items: 'e. Close request' (selected), 'f. Management Approved' (disabled), 'g. Manager Approval' (disabled), and 'h. Manager Response' (disabled). A large red box highlights the 'SUBMIT' button at the bottom left of the main content area.

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

Ticket#	Request For	Category	Request Type/Asset Name	Priority	Description	Raised By	Raised On
SD0003	Service	Internet	Change	High	It should be faster.	Jim jazz	09/09/2016

Figure 85

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

Please refer Figure 86

Status	Pending approval at Jadagish MM	Ticket	SD0003
Category	test	Request Type	Internet
Priority	High	Description	It should be faster.
Request For	Service	Raised On	09/09/2016

Employee Name	Jim jazz	Employee ID	empp205
Reporting Manager	Grame Smith	Approver 1	Jim Carol
Executors	Hans Cronje		

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

The screenshot shows a software interface for managing service requests. At the top, there's a navigation bar with tabs: Dashboard, Self Service, Service Request (which is highlighted in red), HR, Appraisals, Recruitments, Organization, Expenses, and Time. Below the navigation bar, there are two main sections: 'My request summary' and 'My action summary'. The 'My action summary' section is expanded, showing a table of pending tickets. One ticket, SD0001, is highlighted with a red border. The table columns include Ticket#, Request For, Category, Request Type/Asset Name, Priority, Description, Raised By, and Raised On. The ticket SD0001 has the following details: Request For: Service, Category: Internet, Request Type/Asset Name: Change, Priority: High, Description: Tst, Raised By: Jim jazz, and Raised On: 09/07/2016. There are also buttons for 'C' and 'P' at the bottom of the table. To the left of the table, there's a sidebar with a list of status filters: All (2), Open (0), Pending (1, highlighted with a red border and labeled 'C'), Closed (0), and Rejected (0). The URL in the browser's address bar is 'Home > Service Request > My Action Summary > Pending'.

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

The screenshot shows a web-based service request application. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request (which is selected), HR, Appraisals, Recruitments, Organization, Expenses, and Time. Below the navigation is a sidebar titled "My request summary" containing a table with columns for status and count. The "Pending" row is highlighted with a green background. To the right of the sidebar is the main content area. The main content starts with a breadcrumb trail: Home > Service Request > My Action Summary > Pending. Below the breadcrumb is a form section. The first part of the form has fields for "Action" (with a dropdown menu labeled "Select Action" and a red letter "e" above it) and "Comments" (with a text area and a character limit note "200 characters remaining (1250 maximum)" and a red letter "f" to its right). Below these are two buttons: "SUBMIT" (highlighted with a red border and a red letter "g") and "BACK". The second part of the form displays request details in a table:

Status	Management approved	Ticket	S00001
Category	test	Request Type	Internet
Priority	High	Description	tst
Request For	Service	Raised On	09/07/2016

Below this table is another section titled "Raised by" with a table:

Employee Name	Jim jazz	Employee ID	empp205
Reporting Manager	Grame Smith	Approver 1	Jim Carol
Executors	Hans Cronje		

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

Action	Role Name	Role Type	Role Description	Group
	Software Engineer	Employee	Design and develop programming systems m...	Employees
	External User	External	External Users can only visit the site.	External Users
	Agency User	Agency	Agency Users can Visit and comment on th...	External Users
	HR Manager	HRM	Human resource management is the managem...	HR
	System Admin	Sysadmin	A system administrator or sysadmin, is ...	System Admin
	Management	management	He/She is responsible for the entire ope...	Management
	Team Lead	Lead	A team lead is someone who provides guid...	Employees
	Manager	Manager	A Manager is the person responsible for ...	Manager

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

Home > HR > User Management > Roles & Privileges > Add

You can add upto 5 pseudo-roles for each role group.

Role Name *	Role Type *	Role Description
		100 characters remaining (100 maximum)

Privileges *

Note : The add, edit, view and delete privileges are to the grid alone. To remove a certain menu please uncheck the menu item.

Self Service

<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit
<input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> View

Leaves

<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit
<input checked="" type="checkbox"/> Cancel	<input checked="" type="checkbox"/> View

My Details

<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit
<input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> View

My Holiday Calendar

<input checked="" type="checkbox"/> View
--

My Team

<input checked="" type="checkbox"/> View
--

- > Service Request
- > HR
- > Appraisals
- > Talent Acquisition
- > Background Check
- > Organization
- Analytics
- > Site Config
- Modules
- > Expenses
- > Assets
- Time

SAVE Cancel

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

Action	User ID	Email	Role	Status
	US09	lee@example.com	External User	Active
	AGCY8	baker@example.com	Agency User	Active

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

The screenshot shows the HR module's 'External Users' add screen. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, and More. On the left, a sidebar lists various HR categories: Employees, Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration, Contacts, Manage External Users, Vendors, and Clients. The main form area displays fields for User Type (set to 'Users(USER)'), First Name, Last Name, and Email. Below these are sections for 'Assign Role' (with a dropdown menu showing 'Select Role') and 'Comments'. At the bottom are 'Save' and 'Cancel' buttons.

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

Employee Configuration > Employee Tabs	
Category	Sub-Category
Employee Documents	Employee Leaves
Employee Holidays	Salary Details
Personal Details	Contact Details
Employee Skills	Employee Job History
Experience Details	Education Details
Training & Certification Details	Medical Claims
Disability Details	Dependency Details
Visa and Immigration Details	Corporate Card Details
Work Eligibility Details	Additional Details
Pay Slips	Benefits
Remuneration Details	Security Credentials
Asset Details	

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

The screenshot shows the 'Employee Configuration' section of a HR management system. On the left, a sidebar lists various HR modules: Employees, Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration (selected), Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, Job Titles, and Positions. The main content area is titled 'EMPLOYEE CONFIGURATION *'. It contains a grid of checkboxes for selecting employee tabs. The columns are: Employee Documents, Personal Details, Experience Details, Disability Details, Work Eligibility Details, Pay Slips, Employee Leaves, Contact Details, Education Details, Dependency Details, Additional Details, Benefits, Employee Holidays, Employee Skills, Training & Certification Details, Visa And Immigration Details, Remuneration Details, Asset Details, Salary Details, Employee Job History, Medical Claims, Corporate Card Details, and Security Credentials. A red box labeled 'e' highlights the 'Benefits' checkbox. Below the grid are two buttons: 'Check All' (unchecked) and 'SAVE' (highlighted with a red box). A red box labeled 'f' is placed over the 'Check All' button. A red box labeled 'g' is placed over the 'SAVE' button.

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

The screenshot shows the HR application's main interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (which is highlighted with a red box), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar has a tree view with categories like Employees, Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, and Employee Configuration (which is also highlighted with a red box). Under Employee Configuration, there are several sub-menu options: Employment Status (which is expanded and highlighted with a red box), Pay Frequency, Remuneration Basis, Positions, Competency Levels, Education Levels, Languages, Leave Types, Attendance Status, Bank Account Types, Identity Documents, EEOC Categories, Work Eligibility Document Types, Veteran Status, and Military Service Types. The main content area displays the 'Employment Status' configuration page. It shows a table with two rows: 'Left' (Work Code) and 'FT' (Work Short Code). There are buttons for Add, Edit, Delete, and Print. Below the table are search and filter controls. A red letter 'a' is placed above the HR menu item, 'b' is placed above the Employee Configuration menu item, 'c' is placed next to the Employment Status sub-menu item, and 'd' is placed next to the Add button.

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

The screenshot shows the 'Add Employment Status' form. The top navigation bar and left sidebar are identical to Figure 95. The main content area shows a form with fields for 'Work Code' (with a dropdown menu labeled 'Select Work Code') and 'Work Short Code' (with a text input field). There is a large text area for 'Description' with a character limit of 200. At the bottom of the form are 'SAVE' and 'Cancel' buttons. A red bracket 'e' is placed to the right of the 'Description' field, and a red letter 'f' is placed next to the 'SAVE' button.

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

The screenshot shows the HR software interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (highlighted with a red box and labeled 'a'), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar menu is expanded, showing categories like Employees, Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, Employee Configuration (highlighted with a red box and labeled 'b'), and various sub-options under Employee Configuration. The main content area displays the 'Identity Documents' configuration page. The URL in the browser header is Home > HR > Employee Configuration > Identity Documents. The page lists a single document entry: 'Passport' under Action, 'Document Name', 'Mandatory' set to 'Yes', and 'Expiry' set to 'Yes'. There are buttons for 'Pin to shortcuts' and '+Add' (highlighted with a red box and labeled 'd'). A search bar and a records per page dropdown (set to 20) are also visible.

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

The screenshot shows a software interface for managing employee configurations. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists various management modules like Employees, Roles & Privileges, Holiday Management, Leave Management, Exit Procedure, and Employee Configuration (which is expanded to show sub-options: Employee Tabs, Employment Status, Pay Frequency, Remuneration Basis, Job Titles, Positions, Competency Levels, Education Levels, Languages, Leave Types, Attendance Status, Bank Account Types, and Identity Documents). The main content area is titled 'Employee Configuration > Identity Documents > Add'. It contains fields for 'Document Name' (with placeholder 'e'), 'Mandatory' (radio buttons for Yes or No, with 'Yes' selected), 'Expiry' (radio buttons for Yes or No, with 'No' selected), and a 'Description' text area (with placeholder 'Description' and note '100 characters remaining (Code maximum)'). A red box highlights the 'SAVE' button, which is labeled 'h'. Below the 'SAVE' button are 'Cancel' and 'Help' buttons.

Figure 98

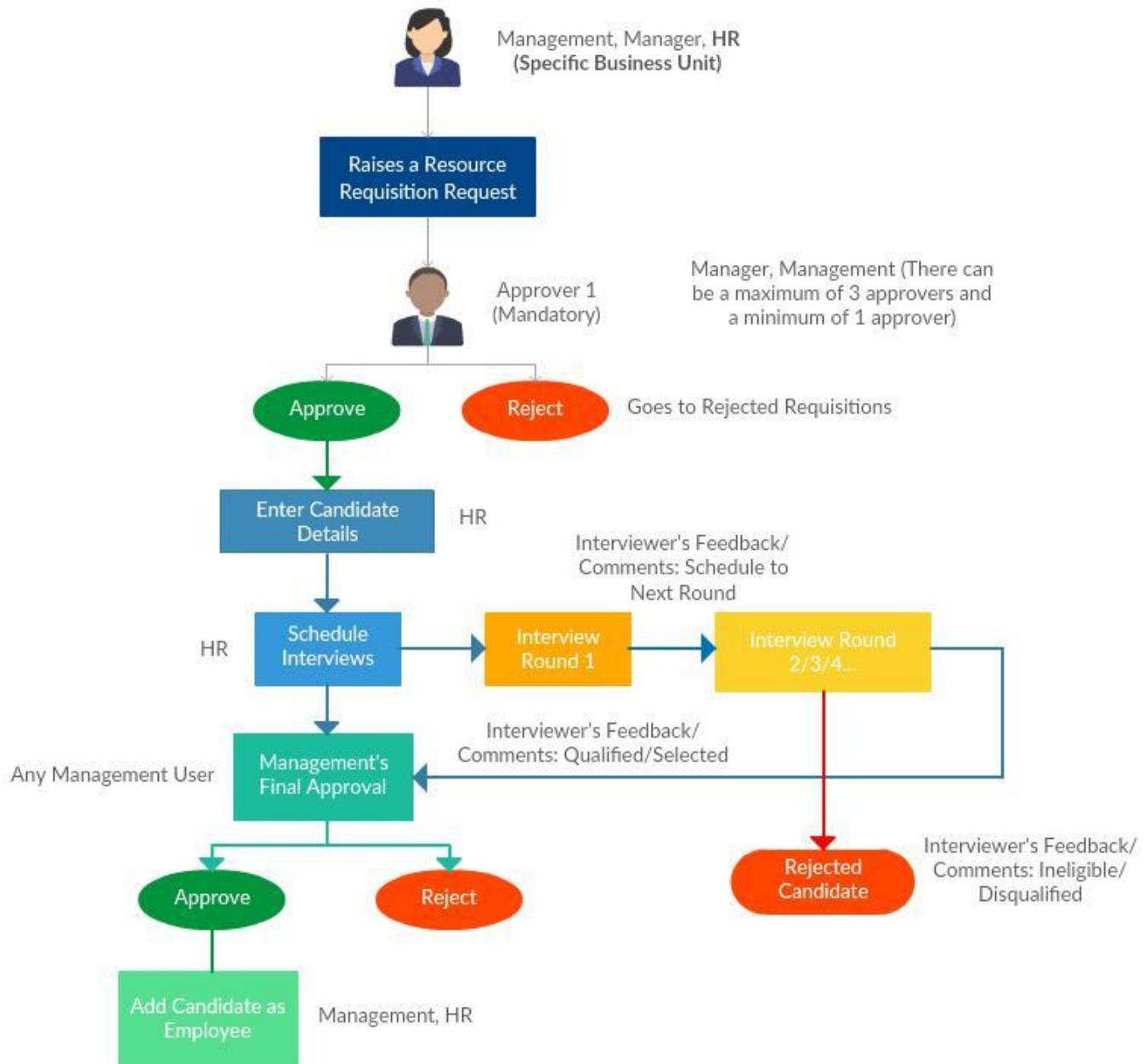
- e. Enter document name
- f. Select if you require a document to be mandatory or not
- g. Select if documents needs to have an expiry date
- h. Click **SAVE** button



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

The screenshot shows the 'Recruitments' section of a software interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments' (which is highlighted in red), 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. On the left, a sidebar menu lists 'Openings/Positions' (highlighted with a red box and labeled 'b'), 'Approved Requisitions', 'Rejected Requisitions', 'Candidates', 'Interviews', 'Shortlisted & Selected Candidates', and 'Shortcuts' with icons for users, search, and export.

The main content area displays a summary of 'Openings/Positions' (1), 'Approved Requisitions' (0), and 'Rejected Requisitions' (0). Below this is a table titled 'Openings/Positions' with columns: Action, Requisition Code, Job Title, Requisition Status, Raised By, No. of Positions, and Filled Positions. One row is shown: Action (with icons), Requisition Code (REQ/008), Job Title (Software Engineer), Requisition Status (Initiated), Raised By (Grame Smith), No. of Positions (1), and Filled Positions (0). At the bottom are search and filter options ('C', '+Add', 'C P').

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

The screenshot shows a recruitment management system interface. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (which is the active tab), Background Check, Organization, Analytics, Site Config, and More. On the left, there's a sidebar with sections for Openings/Positions (Approved Requisitions, Rejected Requisitions, Candidates, Interviews, Shortlisted & Selected Candidates) and Shortcuts (with icons for users, search, and export).

The main content area is titled "Home > Recruitments > Openings/Positions > Add". It contains fields for Requisition Code (REQ/009, highlighted with a red 'd'), Business Unit (No Business Unit), Department (Select Department), Reporting Manager (Select Reporting Manager), Approver -1, Approver -2, Approver -3, Due Date, Job Title, Position, Required no. of Positions, Job Description (with a rich text editor), Required Skills (with a rich text editor), Additional Information, Required Qualification, Required Experience Range, Employment Status (Select Employment Status, Add Employment Status), Priority (Select Priority), Requisition Status (Initiated), Client (Select Client), Recruiters, and a large blue "SAVE" button (highlighted with a red 'g').

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

The screenshot shows the 'Recruitments' tab selected in the top navigation bar. On the left, a sidebar menu has 'Openings/Positions' highlighted with a red box, labeled 'b'. The main content area displays a summary with counts: 'Openings/Positions' (1), 'Approved Requisitions' (0), and 'Rejected Requisitions' (0). Below this is a table titled 'Openings/Positions' with one row. The row contains columns for Action (with an edit icon highlighted with a red box, labeled 'c'), Requisition Code (REQ/008), Job Title (Software Engineer), Requisition Status (Initiated), Raised By (Grame Smith), No. of Positions (1), and Filled Positions (0). At the bottom, there are search and filter options.

Figure 101

- Click **Recruitments** in the top menu
- Click **Openings/Positions** on the left menu panel
- Click **Edit** icon in the action column

Please refer Figure 102

The screenshot shows the 'Recruitments' tab selected in the top navigation bar. On the left, a sidebar menu has 'Openings/Positions' highlighted with a red box. The main content area is an 'Edit' form for a requisition. It includes fields for Requisition Code (REQ/008), Business Unit (Orange Blossom), Department (InformationTechnology), and Reporting Manager (Grame Smith). Under 'Approvers', it lists 'Approver -1' (John Michael), 'Approver -2' (No Approver), 'Approver -3' (No Approver), and Due Date (09/30/2016). Below this are fields for Job Title (Software Engineer) and Position (Software Developer). Further down are sections for Job Description, Required Skills (Dot Net, Java Script), Additional Information, Required Qualification (B.E), Required Experience Range (0-1), Employment Status (Full Time), Priority (High), Requisition Status (Select Status), Client (Select Client), and Recruiters. At the bottom, there are 'UPDATE' and 'Cancel' buttons, with the 'UPDATE' button highlighted with a red box, labeled 'e'.

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

The screenshot shows a software interface for managing recruitment candidates. At the top, there is a navigation bar with links: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (which is highlighted in red), Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists categories: Openings/Positions, Approved Requisition, Rejected Requisitions, Candidates (which is highlighted with a red box and labeled 'b'), Interviews, Shortlisted & Selected Candidates, and others partially visible. The main content area is titled 'Candidates' and shows a list of candidates. The columns include Action, Requisition Code (REQ/003), Job Title (Software Engineer), Candidate Name (Chan Greg), Status (Not Scheduled), Resume, Mobile, Skill Set (SQL, Testing), and Created (Rose M). There are also buttons for 'Add multiple CVs' and a '+Add' button. The bottom of the screen shows a footer with 'Records per page' set to 20.

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

The screenshot shows a recruitment software interface with a blue header bar containing navigation links: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (selected), Background Check, Organization, Analytics, Site Config, and More. The main content area displays a 'Candidates' page with sections for Openings/Positions, Approved Requisitions, Rejected Requisitions, and a list of Candidates. On the right, there is a detailed 'Add Candidate' form.

Annotations:

- d**: A red box highlights the 'Requisition ID' field, which is a dropdown menu labeled 'Select Requisition ID'.
- e**: A red box highlights the 'Location' field, which is a dropdown menu labeled 'Select Country'.
- f1**: A red box highlights the 'UPLOAD RESUME' button.
- f2**: A red box highlights the 'ENTER CANDIDATE DETAILS' button.
- g**: A red box highlights the 'SAVE' button.

Form Fields:

- Requisition ID: Select Requisition ID (dropdown)
- Status: Not Scheduled (dropdown)
- Candidate First Name: Text input
- Candidate Last Name: Text input
- Source: Select Source (dropdown)
- Email: Text input
- Contact Number: Text input
- Skill Set: Text input
- Qualification: Text input
- Work Experience: Text input
- Education Summary: Text input
- Summary: Text input
- Location: Select Country (dropdown)
- Country: Select Country (dropdown)
- State: Select State (dropdown)
- City: Select City (dropdown)
- Add Country: Link
- Add State: Link
- Add City: Link
- Postal Code: Text input
- Address: Text input
- Company 1: Text input
- Company Name: Text input
- Designation: Text input
- From: Date picker
- To: Date picker
- Contact Number: Text input
- Web site: Text input

Buttons at the bottom:

- SAVE (highlighted with a red box)
- SAVE AND SCHEDULE
- CANCEL

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

The screenshot shows a software interface for managing recruitment. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (which is currently selected and highlighted in red), Background Check, Organization, Analytics, Site Config, and More. Below the navigation is a sidebar with categories: Openings/Positions, Approved Requisitions, Rejected Requisitions, Candidates, and Interviews (which is also highlighted with a red box and labeled 'b'). The main content area is titled 'Interviews' and shows a table of existing interviews. The columns include Action, Requisition Code, Job Title, Candidate Name, Email, Mobile, and Status. One row is visible: Requisition Code 'REQ/003', Job Title 'Software Engineer', Candidate Name 'Chan Greg', Email 'chan@example.com', Mobile '9797898987', and Status 'In process'. There are buttons for filtering ('C') and adding ('P'). At the bottom right of the table, it says 'Records per page' with a dropdown set to '20'.

Figure 105

- Click **Recruitments** in the top menu
- Click **Interviews** on the left menu panel
- Click **+Add** button on the right side

Please refer Figure 106

This screenshot shows the 'INTERVIEW DETAILS' form. On the left, there's a sidebar with the same categories as Figure 105. The main form has several input fields: 'Requisition ID' (highlighted with a red box and labeled 'd'), 'Candidate Name' (with a dropdown arrow highlighted with a red box and labeled 'e'), 'Interview Status' (dropdown), 'Interviewer' (dropdown), 'Location' (dropdown), 'Country' (dropdown), 'State' (dropdown), 'City' (dropdown), 'Interview Type' (dropdown), 'Interview Date' (calendar icon), 'Interview Time' (dropdown), and 'Time Zone' (dropdown). Below these fields is a 'Interview Name' input field (highlighted with a red box and labeled 'f'). At the bottom are 'SAVE' and 'Cancel' buttons (the 'SAVE' button is highlighted with a red box and labeled 'g').

Figure 106

- Select the Requisition ID
- 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

The screenshot shows the 'Recruitments' menu option selected in the top navigation bar. On the left, a sidebar lists 'Interviews' (selected and highlighted with a red box), 'Shortlisted & Selected Candidates', and other options like 'Openings/Positions' and 'Approved Requisitions'. The main content area displays a table titled 'Interviews' with columns: Action, Requisition Code, Job Title, Candidate Name, Email, Mobile, and Status. A single row is shown for 'REQ/003' with 'Software Engineer' as the job title and 'Chan Greg' as the candidate name. The status is 'In process'. At the bottom right of the table, there's a 'Records per page' dropdown set to 20.

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

The screenshot shows the 'Interviews' page with the 'Edit' icon for the interview from Figure 107 selected (highlighted with a red box). The top section is titled 'INTERVIEW DETAILS' with fields for 'Interview Status' (In Process) and 'Candidate Status' (Scheduled), along with 'Update' and 'Cancel' buttons. Below this is a summary table with columns: Requisition ID (REQ/003), Job Title (Software Engineer), Candidate Name (Chan Greg), and Candidate Details (View Resume). The bottom section is titled 'Interview Rounds' and shows a table with columns: Action, Interview Round, Interview Name, Interviewer, Interview Date, and Round Status. One row is listed for 'Written' by 'John Michael' on '09/12/2016'. The bottom right of the table has a 'Records per page' dropdown set to 20.

Figure 108

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

Please refer Figure 109

Interview Rounds

Interviewer *	Location *	Country *
Johnson Andrew , Manag...	Brooklyn	United States
State *	City *	Interview Type *
California	Berkeley	In Person
Interview Date <small>?</small> *	Interview Time *	Time Zone
09/30/16	01:00 PM	America/Antigua [AST]
Interview Name <small>?</small>	Interviewer Feedback	Interviewer Comments
Written		
Result Status *	Select Status	
UPDATE	Cancel	

e e
f f

Figure 109

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

Please refer Figure 110

Interview Details

Action	Interview Round	Interview Name	Interviewer	Interview Date	Round Status
<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="View"/>	1	Written	Bush gg	09/30/16	Schedule for next round

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

Shortlisted & Selected Candidates

Action	Requisition Code	Job Title	Candidate Name	Email	Contact Number	Status
<input checked="" type="checkbox"/>	REQ/004	Employee	Robert Trance	robert@example.com	1234567988	Shortlisted

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

The screenshot shows the HRMS software interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments (which is selected and highlighted in dark blue), Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists Openings/Positions, Approved Requisitions, Rejected Requisitions, Candidates, Interviews, and Shortlisted & Selected Candidates (which is also selected and highlighted). Below the sidebar is a row of three icons: a person icon, a document icon, and a mail icon. The main content area displays a form for editing a candidate. At the top of the form, there is a 'Candidate status*' field with a dropdown menu labeled 'Select Status' and an 'UPDATE' button. The 'UPDATE' button is highlighted with a red box and labeled 'e'. Below this, the form fields include 'Requisition Id : REQ/004', 'Job Title : Employee', 'Candidate Name : robert trance', 'Email : robert@example.com', 'Qualification : ', 'Work Experience : 0 year(s)', 'Skill Set : PHP', 'Summary : ', 'Education Summary : ', and 'INTERVIEW DETAILS' section containing a table with rows for Round Name (Written), Interviewer (Bush gg), Time (01:00 PM), Date (09/30/16), Mode (In person), Feedback (Performance is Satisfactory), Comments (Schedule this candidate for the next round), Status (Schedule for next round), and Location (Brooklyn street, Atlanta, Georgia, United States).

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

The screenshot shows the HR module interface. At the top, there is a navigation bar with links: Dashboard, Self Service, Service Request, **HR**, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. A red box labeled 'a' highlights the 'HR' link. On the left, a sidebar titled 'Employees' contains links for Roles & Privileges, Holiday Management, Leave Management, Employee Configuration, and Contacts. Below these are 'Shortcuts' with icons for Groups, Favorites, Requests, and Search. The main content area shows a breadcrumb path: Home > HR > Employees. It includes a search bar with 'Select Search Category' and 'Search' buttons, and buttons for 'Import Employees', 'Import format', 'Help', and a red 'Add' button labeled 'b'. There are four employee cards displayed:

Employee Name	Role	Department
Jim Carl	Employee	Development
Anderson Neo	Manager	Human Resource
Ruby Jackson	Employee	Development
Johny Rodhes	Manager	Quality Assurance

Each card includes a small profile icon, an ID number, an email address, and a phone number.

Figure 113

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

Please refer Figure 114

The screenshot shows the 'Employees' section of an HR application. The left sidebar lists various employee-related modules like Roles & Privileges, Holiday Management, Leave Management, etc. The main form is titled 'Employee Add' and contains fields for Employee Code (empp), Employee Id, Prefix, Candidate Name (d), Mode of Employment (Interview), Requisition code, Role, Email, Business Unit, Department, Reporting Manager, Job Title, Position, Employment Status, Date of Joining, Date of Leaving, Years of Experience, Work Telephone Number, Extension, and Fax. A red bracket labeled 'e' spans across the middle section of the form. A red box labeled 'f' highlights the 'SAVE' button at the bottom.

Annotations:

- d**: Candidate Name field
- C**: Mode of Employment field
- e**: Middle section of the form (Candidate details, department, reporting)
- f**: SAVE button

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	Johnny 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
Recruiter	Rose Mary		

JOB DETAILS

Job Title	Employee	Job Description	—
Required Skills	QA, SQL and Automation	Additional Information	—

Candidate details

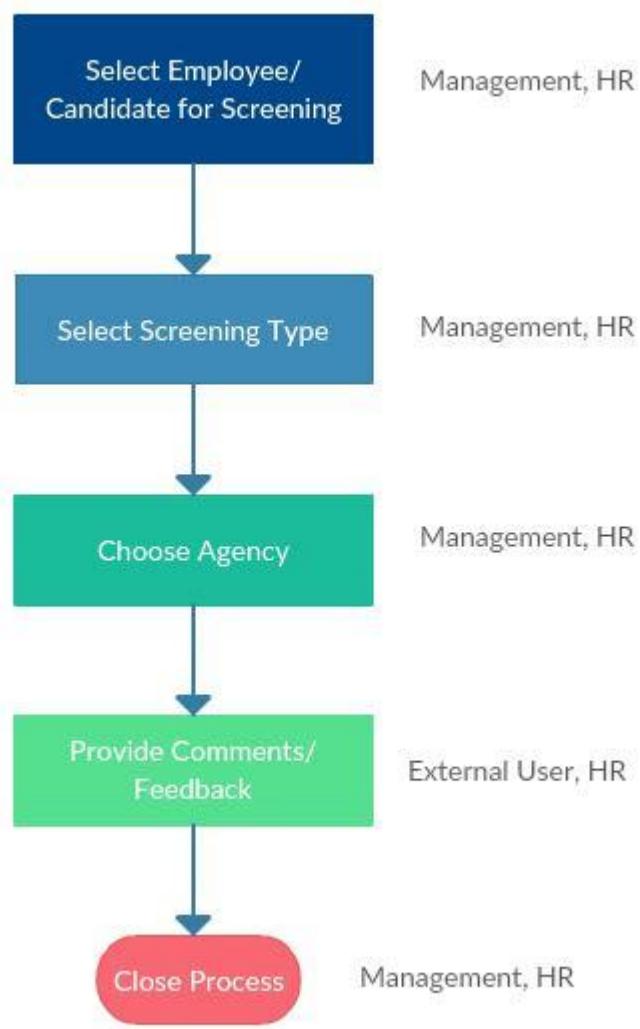
Candidate Name	Candidate Status
No data found	

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

The screenshot shows the 'Background Check' application's configuration section. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is highlighted in red), Organization, Analytics, Site Config, and More. On the left, a sidebar menu has 'Configuration' expanded, with 'Screening Types' selected (also highlighted in red). Sub-menu items include Agencies, Screening, and Shortcuts, each with a small icon. The main content area is titled 'Screening Types' and lists one item: 'Education' under the 'Action' column, with 'Description' and 'Records per page' (set to 20) columns. A toolbar at the bottom right includes icons for search, refresh, and export, along with a red '+Add' button and a green 'P' button.

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

The screenshot shows the 'Background Check' application's configuration section, specifically the 'Add Screening Type' form. The top navigation bar and sidebar are identical to Figure 115. The main content area is titled 'Screening Type' (with a red 'e' marker) and contains two input fields: 'Screening Type' (with a red 'e' marker) and 'Description' (with a note '200 characters remaining (200 maximum)'). Below the fields are 'SAVE' and 'Cancel' buttons, with the 'SAVE' button highlighted by a red box and a red 'f' marker. A status message 'Screening Type successfully added.' is visible at the bottom.

Figure 116

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

8.2 How do I add an Agency?

Please refer Figure 117

The screenshot shows a software application interface for managing background checks. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is highlighted in red), Organization, Analytics, Site Config, and More. On the left, a vertical menu has 'Configuration' selected (marked with 'b'). Under Configuration, 'Screening Types' is listed, and 'Agencies' is selected (marked with 'c'). Below this are 'Shortcuts' and three icons. The main content area is titled 'Agencies' and displays a table with one row. The table columns are Action, Agency Name, Phone, Address, Website URL, and User ID. The single record shown is Predat, with details: Phone 1234567890, Address Brooklyn lane, Website URL www.predat.com, and User ID BGCK180. At the bottom right of the table are 'Records per page' set to 20 and a dropdown arrow. To the right of the table are buttons for 'Pin to shortcuts', '+Add' (highlighted with 'd'), and 'G P'.

Action	Agency Name	Phone	Address	Website URL	User ID
	Predat	1234567890	Brooklyn lane.	www.predat.com	BGCK180

Records per page: 20

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

The screenshot shows a software interface for managing background checks. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is highlighted in black), Organization, Analytics, Site Config, and More. Below the navigation is a sidebar with sections for Configuration (Screening Types, Agencies), Screening (Shortcuts with icons for Create, Edit, Delete), and a search bar. The main content area shows a breadcrumb path: Home > Background Check > Configuration > Agencies > Add. The form fields include Agency Name*, Website URL*, Primary Phone*, Secondary Phone*, Screening Type*, Address*, and a link to Add Screening Type. A large bracket labeled 'e' covers the top section of the form. Below this is a section labeled 'POC DETAILS' containing fields for Contact 1 (First Name*, Last Name*, Mobile*), Contact 2, Contact 3 (Email*, Location*, Country*, State*, City*, Contact type*), and a 'Select Role' dropdown. A bracket labeled 'f' covers the POC DETAILS section. At the bottom left is a 'Contact type*' dropdown with 'Select Role' selected, and a bracket labeled 'g' points to it. At the bottom right are 'SAVE' and 'Cancel' buttons, with a bracket labeled 'h' pointing to the 'SAVE' button.

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 [6.2 How do I add Roles & Privileges](#))
- h. Click **SAVE** button

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

Please refer Figure 119

The screenshot shows the 'Background Check' section of a software application. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is highlighted in red), Organization, Analytics, Site Config, and More. On the left, a sidebar titled 'Configuration' has a 'Screening' section with a dropdown menu; the 'Employee/Candidate Screening' option is selected and highlighted with a red box, labeled 'b'. Below this are 'Shortcuts' with three icons. The main content area shows a breadcrumb path: Home > Background Check > Screening > Employee/Candidate Screening. A dropdown menu for 'Employees' is open. The main table is titled 'Employee/Candidate Screening' and displays one record:

Action	Name	Background Check Status	Job Title	Email	Employee Status
	Remo Dsouza	Complete	Employee	remo123@mailinator.com	Active

On the right side of the table are buttons for '+Add' (highlighted with a red box, labeled 'd') and 'Print'.

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

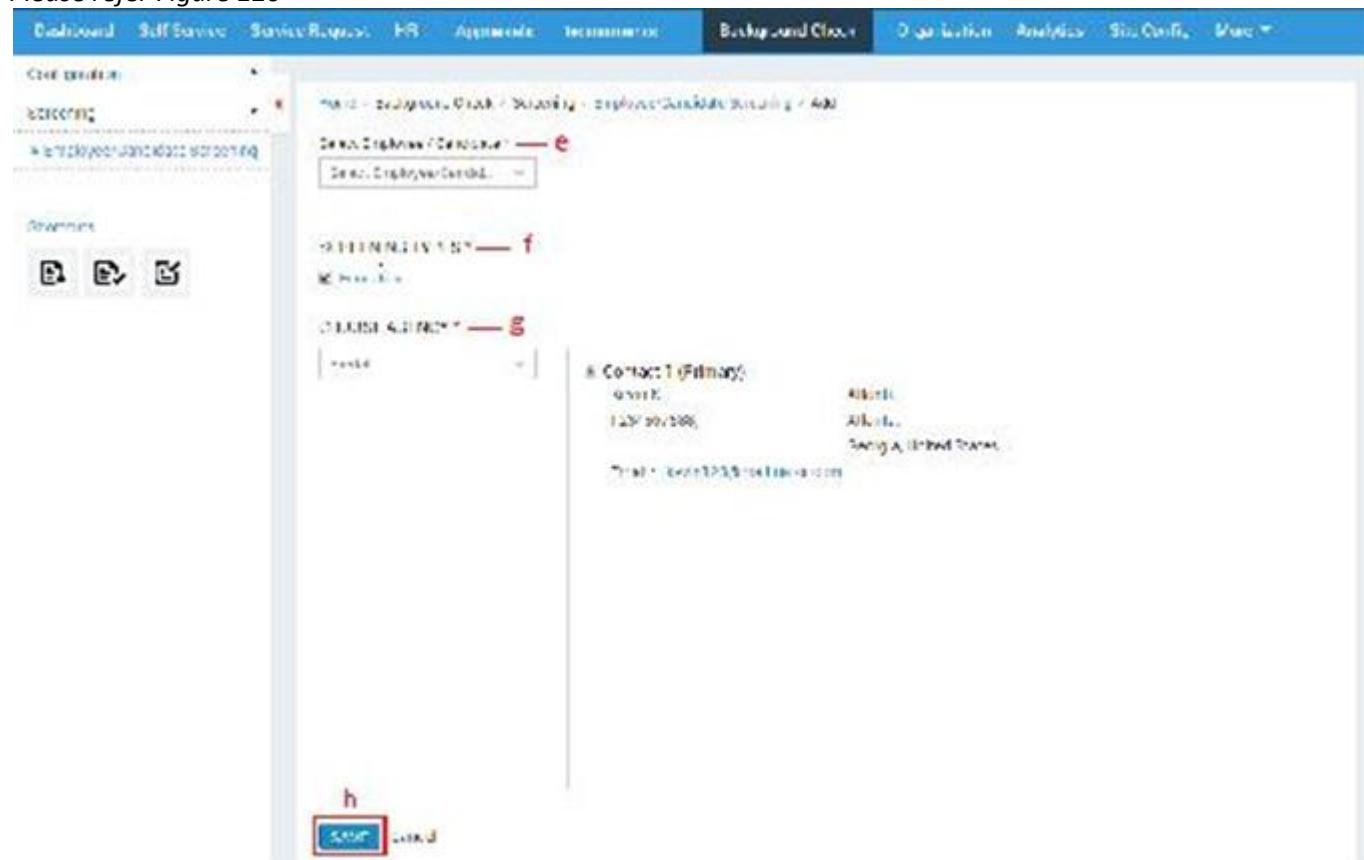


Figure 120

- 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

The screenshot shows the Site Config General Email Contacts page. At the top, there is a navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (which is highlighted with a red box and labeled 'a'), and More. On the left, a sidebar titled 'Site Preferences' has a 'General' section highlighted with a red box and labeled 'b'. Below 'General' are other items like Ethnic Codes, Identity Codes, Gender, Time Zones, Marital Status, Prefixes, Race Codes, Nationality Context Codes, Nationalities, Account Class Types, License Types, and Email Contacts (which is also highlighted with a red box and labeled 'c'). The main content area is titled 'Email Contacts' and shows a table with one row. The table columns are Action, Business Unit, Group, and Group Email. The data in the table is: Action (with icons), Business Unit (Orange Blossom), Group (Background Check - HR Group), and Group Email (jim@example.com). There are also search and records per page controls at the bottom of the table.

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

The screenshot shows the Site Config General Email Contacts Add page. The layout is similar to Figure 121, with a top navigation bar and a left sidebar. The sidebar has a 'General' section highlighted with a red box and labeled 'e'. The main content area is titled 'Email Contacts > Add' and contains three input fields: 'Business Unit' (set to 'No Business Unit'), 'Group' (set to 'Select Group'), and 'Group Email' (an empty text field). Below these fields are two buttons: 'SAVE' (highlighted with a red box and labeled 'f') and 'Cancel' (labeled 'g').

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

Action	Name	Background Check Status	Job Title	Email	Employee Status
<input checked="" type="checkbox"/>	George gg	In process	Manager	gergre123@mailinator.com	Active

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

The screenshot shows a software application interface with a blue header bar containing various menu items: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (which is highlighted in dark blue), Organization, Analytics, Site Config, and More. Below the header is a navigation sidebar with sections: Configuration, Screening, and Employee/Candidate Screening (which is also highlighted). The main content area has a breadcrumb trail: Home > Background Check > Screening > Employee/Candidate Screening > Edit. A modal window titled 'Change Background Check Status' is open, showing a dropdown menu with 'In Process' selected and a 'Cancel' button. Below the modal is a user profile card with a placeholder icon, Name: George Gg, Email Id: gergre123@mailinator.com, and Status: Active. At the bottom is a table titled 'Background check Process' with columns: Action, Check Type, Agency Name, POC Email, Process Status, Explanation, Active Status, and Started On. One row in the table is highlighted with a red box around its 'Action' column, which contains an edit icon.

Action	Check Type	Agency Name	POC Email	Process Status	Explanation	Active Status	Started On
	Education	Predat.	kevin123@mailinator.com	In process		Active	09/15/16

Figure 124

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

Please refer Figure 125

Background check Process

Change Background Check Status: *
In Process

UPLOAD FEEDBACK DOCUMENT f
Upload Feedback File

AGENCY & POC DETAILS

Check Type	: Education
Agency Name	: Predat
Contact Person Name	Kevin K
Contact Number	: 1234567000
Email	: kevin123@mailinator.com
Address	: Atlanta, Atlanta, Georgia, United States

SAVE g

ENTER COMMENTS / FEEDBACK h

POST i

No comments posted

CLOSE

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

Dashboard Self Service Service Request HR Appraisals Recruitments Background Check Organization Analytics Site Config More ▾

Configuration ▶
Screening b
Employee/Candidate Screening c

Pin to shortcuts

Employees:

Employee/Candidate Screening

Action d	Name	Background Check Status	Job Title	Email	Employee Status
	George gg	In process	Manager	gerger123@mailinator.com	Active

Shortcuts

Records per page 20 ▾

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

The screenshot shows the application's navigation bar with links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check (selected), Organization, Analytics, Site Config, and More. On the left, a sidebar titled 'Configuration' has sections for 'Screening' and 'Employee/Candidate Screening'. Below this are 'Shortcuts' with icons for Create, Edit, and Delete. The main content area shows a breadcrumb path: Home > Background Check > Screening > Employee/Candidate Screening > Edit. A modal window titled 'Change Background Check Status' is open, showing a dropdown set to 'In Process' and a 'Cancel' button. Below the modal is a user profile picture and details: Name: George Gg, Email Id: gergre123@mailinator.com, Status: Active. At the bottom of the page is a grid titled 'Background check Process' with columns: Action, Check Type, Agency Name, POC Email, Process Status, Explanation, Active Status, and Started On. One row in the grid is highlighted with a red border around the 'Action' column icon.

Action	Check Type	Agency Name	POC Email	Process Status	Explanation	Active Status	Started On
	Education	Predat	kevin123@mailinator.com	In process		Active	09/15/16

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

Background check Process X

Change Background Check Status * —— g

Complete

SAVE h

UPLOAD FEEDBACK DOCUMENT ? —— f

Upload Feedback File

AGENCY & POC DETAILS

Check Type : Education

Agency Name : Predat

Contact Person Name : Kevin K

Contact Number : 1234567888

Email : kevin123@mailinator.com

Address : Atlanta, Atlanta, Georgia, United States

POST

ENTER COMMENTS / FEEDBACK

No comments posted

CLOSE

The screenshot shows a user interface for a 'Background check Process'. At the top, there's a header with a close button. Below it, a section for 'Change Background Check Status' has a dropdown set to 'Complete' with a red arrow 'g' pointing to it. To the right is a 'SAVE' button in a blue box with a red border, also labeled 'h'. Further right is an 'UPLOAD FEEDBACK DOCUMENT' section with a question mark icon and a 'Upload Feedback File' button. The main body contains 'AGENCY & POC DETAILS' with fields for Check Type (Education), Agency Name (Predat), Contact Person Name (Kevin K), Contact Number (1234567888), Email (kevin123@mailinator.com), and Address (Atlanta, Atlanta, Georgia, United States). Below these is a 'Comments / Feedback' section with a 'POST' button and a message saying 'No comments posted'. At the bottom left is a 'CLOSE' button.

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

The screenshot shows a modal dialog box titled "Change Background Check Status". Inside the dialog, there is a dropdown menu with the option "Complete" selected. To the right of the dropdown is a blue "SAVE" button, which is highlighted with a red box. Below the dialog, the main page displays a list of employees with their details: Name (George Gg), Email Id (gerge123@mailinator.com), and Status (Active). On the left side, there is a sidebar with sections for Configuration, Screening, and Employee/Candidate Screening, with "Employee/Candidate Screening" currently selected. At the bottom of the page, there is a table titled "Background check Process" with columns for Action, Check Type, Agency Name, POC Email, Process Status, Explanation, Active Status, and Started On. One row is visible in the table.

Action	Check Type	Agency Name	POC Email	Process Status	Explanation	Active Status	Started On
	Education	Predat.	kevin123@mailinator.com	In process		Active	09/15/16

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

The screenshot shows a software interface for managing organizational information. At the top, there is a navigation bar with links: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, **Organization**, Analytics, Site Config, and More. The 'Organization' link is highlighted with a red box. On the left, a sidebar menu includes: Organization Info (highlighted with a red box), Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, and Policy Documents. Below the sidebar is a 'Shortcuts' section with three icons. The main content area displays organization details in a table format, with a red box labeled 'c' highlighting the table. The table contains the following data:

Organization	: Global Solutions
Business Domain	: Engineering More
Website	: www.example.com
Total Employees	: 101-500
Started On	: 09/01/99
Primary Phone	: 1234567890
Country	: United States
State	: California
City	: Berkeley

To the right of the table is a map of the San Francisco Bay Area, with a red dot marking the location of Berkeley. There are also 'Map' and 'Address' buttons. At the bottom right of the map area is a 'Google' logo. A red box labeled 'd' highlights the 'EDIT' button located at the top right of the main content area.

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

The screenshot shows a software interface for managing business units and departments. At the top, there's a navigation bar with tabs: Details, Tel Services, Service Request, HR, Appraisal, Recruitments, Financial Client, Department, Audit, Marketing, and More. The 'Department' tab is currently selected.

The main area is titled 'Edit - Organization & Department Information'. It contains several input fields:

- Symbol:** User Selected (disabled)
- Name:** ABC Company
- Established On:** 10-01-2015
- Address:** 123 Main Street, Suite 100, Anytown, USA
- City:** Anytown
- State:** Any State
- Country:** United States
- Phone:** +1 234 567 8900
- Email:** info@abc.com
- Logo:** A placeholder box with 'LOGO' and 'Upload file' text.

At the bottom right, there's a red-bordered 'UPDATE' button with the number '8' above it, indicating pending changes.

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

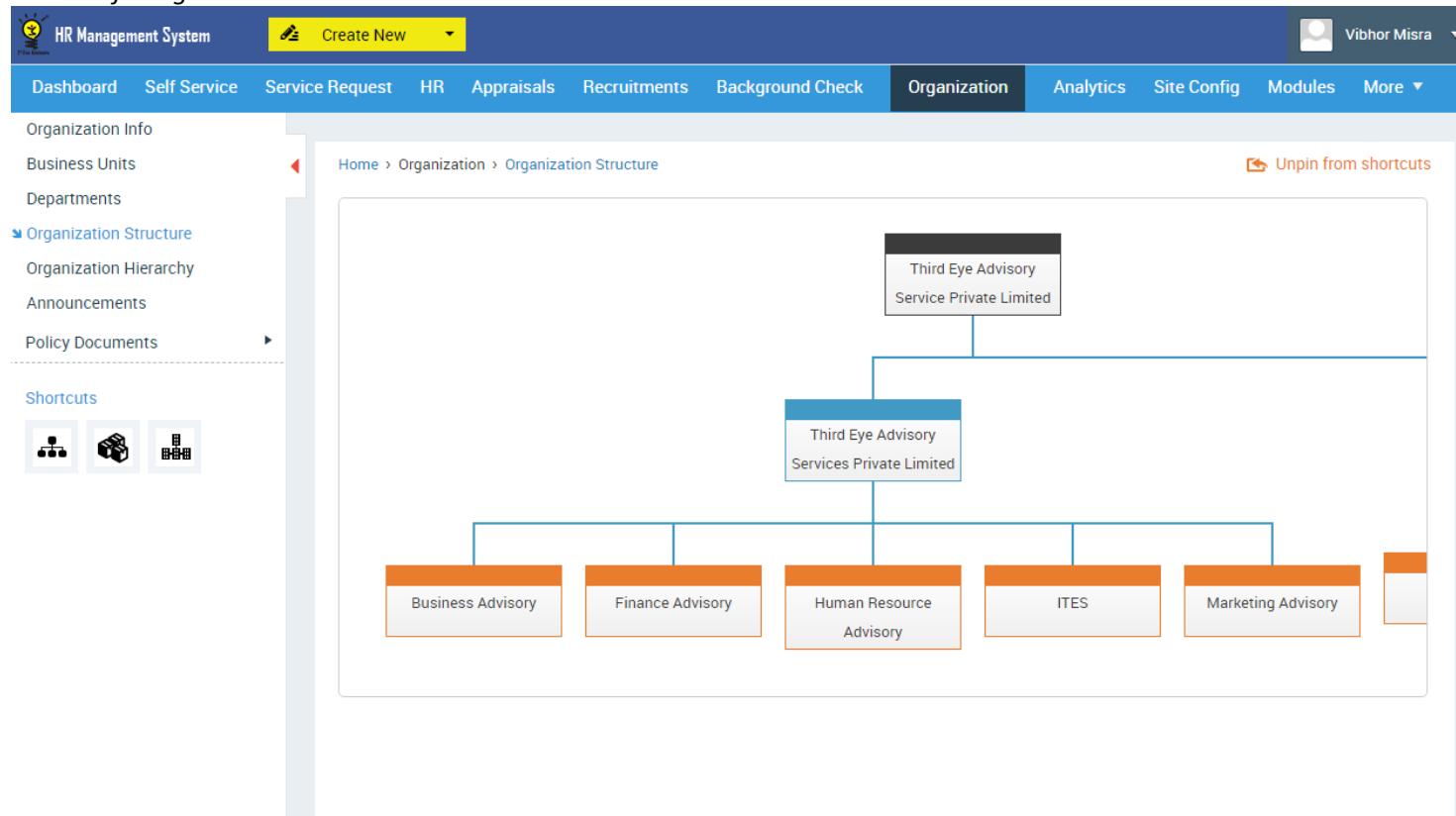


Figure 133

- Click **Organization** in the top menu
- Click **Organization Structure** on the left side panel
- 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

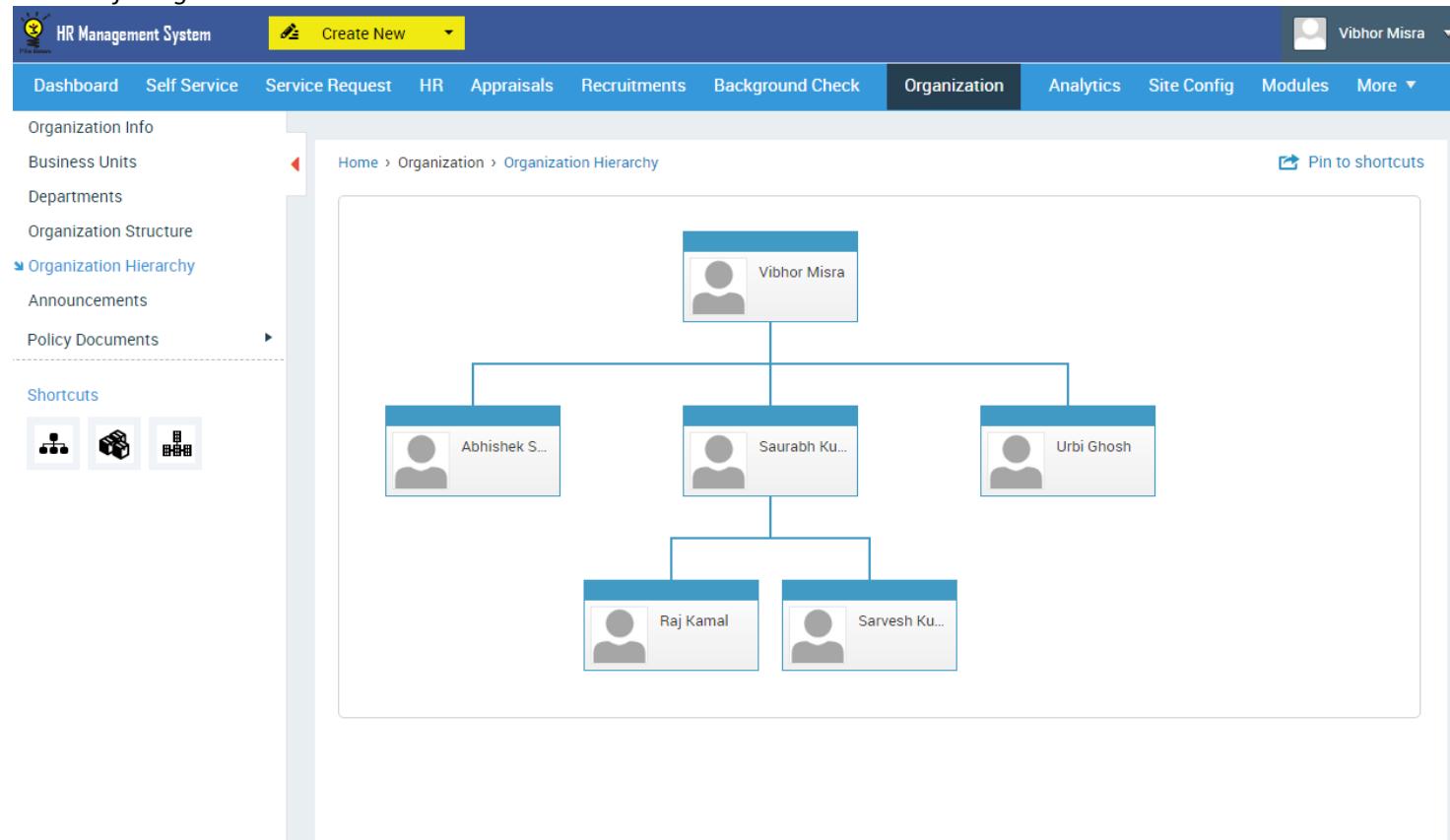


Figure 134

- 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 shows the 'Categories' page for Policy Documents. The left sidebar has 'Policy Documents' selected (labeled 'b'). Under 'Policy Documents', 'Categories' is selected (labeled 'c'). The main content area shows a table with one row: 'Leave Policy' under 'Category' and 'Employee Category' under 'Description'. A red box labeled 'd' highlights the '+Add' button in the top right corner.

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 shows the 'Add' form for a new Policy Document category. The left sidebar has 'Policy Documents' selected (labeled 'b'). Under 'Policy Documents', 'Categories' is selected (labeled 'c'). The main content area shows a form with 'Category' and 'Description' fields. A red bracket labeled 'e' covers the 'Category' and 'Description' fields. A red arrow labeled 'f' points to the 'SAVE' button.

Figure 136

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

Please refer Figure 137

The screenshot shows the 'Leave Policy' list page. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. The left sidebar has sections for Organization Info, Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, Policy Documents (with 'Leave Policy' selected), Categories, and Shortcuts. The main content area displays a table titled 'Leave Policy' with columns: Action, Document, Description, Version, and Uploaded Document. One row is shown for 'Sick Leave'. A red box labeled 'g' highlights the 'Leave Policy' category in the sidebar. A red box labeled 'h' highlights the '+Add' button in the top right corner of the table header.

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

The screenshot shows the 'Leave Policy' add form page. The top navigation bar is identical to Figure 137. The left sidebar shows the 'Leave Policy' category selected. The main form has fields for Document*, Category* (set to 'Leave Policy'), Description, and Version. Below these are sections for Select Document (with 'Upload Document' button) and file attachments (with four icons). A red bracket labeled 'i' covers the 'Category*', 'Description', and 'Version' fields. A red box labeled 'j' highlights the 'SAVE' button at the bottom left of the form.

Figure 138

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

9.6 How do I view Policy Documents?

Please refer Figure 139

The screenshot shows the HRIS application's interface. At the top, there is a navigation bar with links: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization (which is highlighted in red), Analytics, Site Config, and More. On the left, a vertical menu has items: Organization Info, Business Units, Departments, Organization Structure, Organization Hierarchy, Announcements, Policy Documents (with a dropdown arrow), Categories, Leave Policy (which is highlighted in red), and Shortcuts. The 'Leave Policy' category is expanded, showing a list of documents. The first document listed is 'Sick Leave'. The table columns are Action, Document, Description, Version, and Uploaded Document. The 'Action' column for the first row contains icons: a red-bordered 'd' (Delete), a blue eye (View), a green edit (Edit), and a blue info (Info). The 'Description' column shows 'Sick Leave', 'Version' shows '1', and 'Uploaded Document' shows 'feedback_57df756fa70d7_1474262383.pdf'. Below the table, there are buttons for 'Add multiple documents' and 'Add' (with a red '+' icon). There are also 'C' and 'P' buttons. At the bottom, there is a 'Records per page' dropdown set to 20.

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

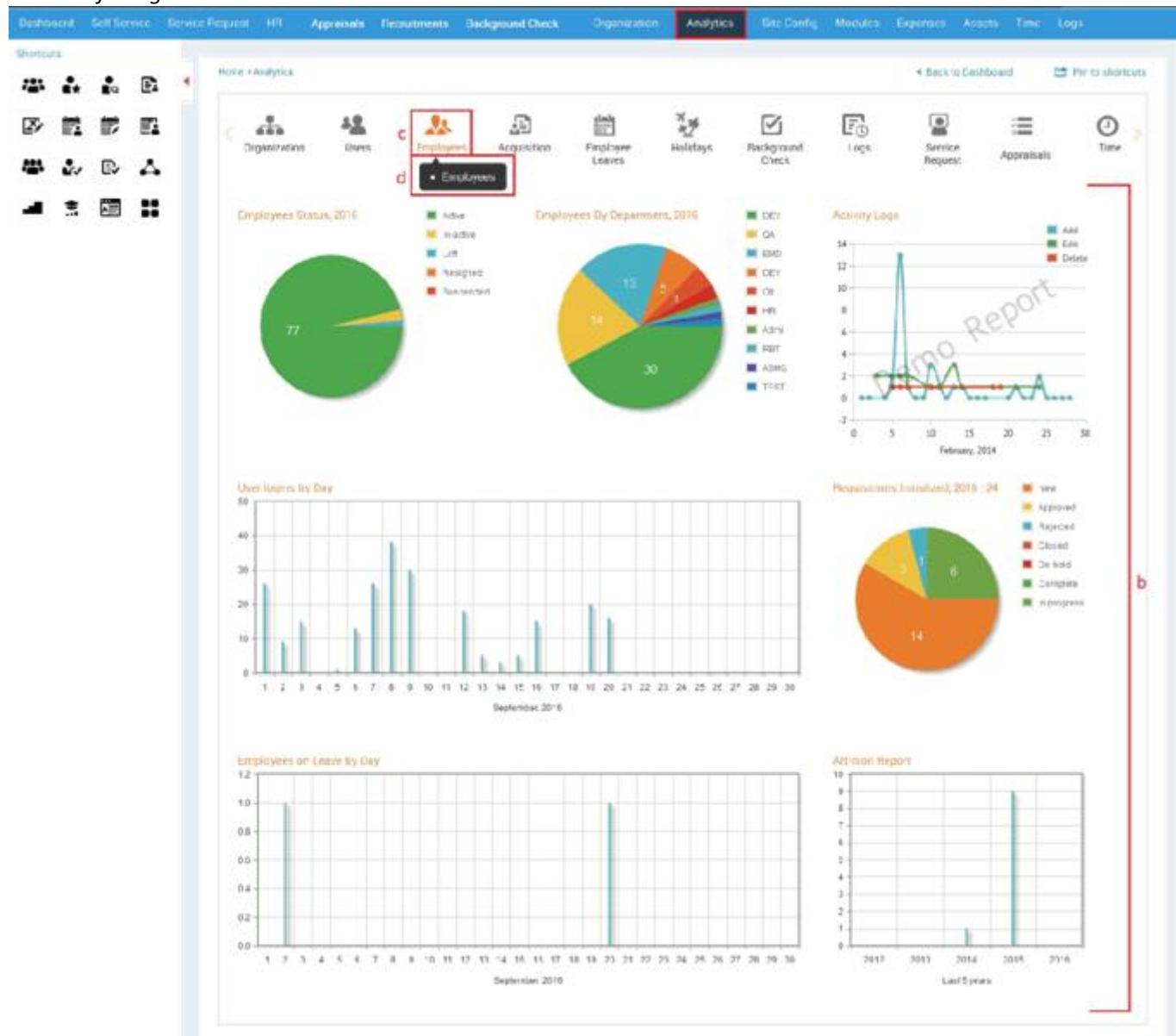


Figure 140

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

- d. Click on the corresponding submenu

Please refer Figure 141

The screenshot shows the 'Employees' report page within the Analytics module. On the left, there is a sidebar with various filters: Reporting Manager, Business Unit, Department, Role, Job Title, Position, Employment Status, Date of Joining, and Mode of Employment. Below these filters is a 'Generate Custom Report' button. To the right of the filters is a table titled 'Employees' with columns for Employee ID, Employee, Email, Mobile, Role, and Reportin. At the bottom of the table is a 'Records per page' dropdown set to 20. At the top right of the page, there are 'Back to Analytics' and 'Back to Dashboard' links, along with 'Export to PDF' and 'Export to Excel' buttons.

Employee ID	Employee	Email	Mobile	Role	Reportin
empp105	Mr. Robert Rayo	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	Anderson
empp008	Mr. Jim Kerry	kerry@mailinator.com	--	Employee	Johnny R
empp0018	Mr. Quality One	req@mailinator.com	--	Employee	Johnny R
empp0014	Mr. Brad Pit	pit@mailinator.com	--	Employee	Johnny R
empp0012	Mr. Jorge Bush	jor@mailinator.com	--	Manager	Anderson
empp0011	Mr. Richard Son	son@mailinator.com	--	Management	Anderson
empp0010	Mr. Tom Cat	caty@mailinator.com	--	Employee	Johnny 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	adminn@mailinator.com	--	System Admin	Anderson
empp002	Mrs. Anderson Neo	adns@mailinator.com	--	Management	
empp005	Ms. Rose Mary	hrd@mailinator.com	--	HR Manager	Anderson
empp004	Mr. Johny Rodhes	rodes@mailinator.com	--	Manager	Anderson
empp003	Mr. William Wallace	walls@mailinator.com	--	Manager	Anderson

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

The screenshot shows the Site Preferences page within the Configuration Wizard interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (which is highlighted in red), and More. A left sidebar lists Site Preferences, General, Location, Currency, and Shortcuts, with four icons below. The main content area displays Site Preferences details with a red box labeled 'c' over the table header. A red box labeled 'd' highlights the 'Edit' button in the top right corner of the table row for Default Password. A red box labeled 'a' is at the top right of the page, and another red box labeled 'b' is on the left sidebar next to 'Site Preferences'.

Default Date Format	Day, month and four digit year with dots. (Example: 10.01.2013)	Default Time Format	Hour and minutes, with meridian. (Example: 9:10 AM)
Default Time Zone	America/Antigua [AST]	Default Currency	US Dollar(USD)
Default Password	Alphanumeric The password should contain atleast one alphabet and one number. The minimum length should be 6 characters and maximum length should be 15 characters. Eg: myname123		
Description	...		

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

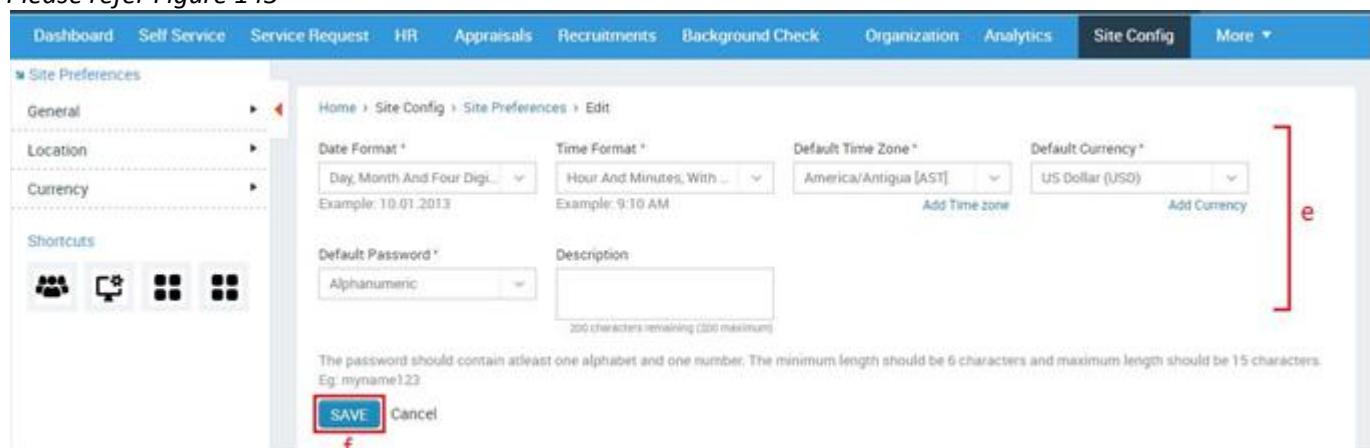


Figure 143

- 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

The screenshot shows the 'General' section under 'Site Preferences'. The left sidebar lists various categories: Ethnic Codes, Identity Codes, Gender (highlighted with a red box 'b'), Time Zones, Marital Status, Prefixes, Race Codes, Nationality Context Codes, Nationalities, Account Class Types, License Types, Email Contacts, Number Formats, Location, and Currency. The main panel displays a table for 'Gender' with columns: Action, Gender Code, Gender, and Description. Two entries are shown: M (Male) and F (Female). A red bracket 'c' points to the 'Gender' category in the sidebar. A red box 'd' highlights the 'Add' button in the top right of the table area. A red bracket 'e' points to the 'Pin to shortcuts' icon in the top right corner. The 'f' label points to the 'Add' button.

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

The screenshot shows a software interface for managing site preferences. On the left, a sidebar titled 'Site Preferences' has 'General' selected. The main content area is titled 'Home > Site Config > General > Gender > Add'. It contains three input fields: 'Gender Code' (empty), 'Gender' (empty), and 'Description' (empty, with a note '200 characters remaining (200 maximum)'). A red bracket labeled 'e' points to the 'Description' field. A red box labeled 'f' points to the 'SAVE' button at the bottom left.

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 **EMP0033** and **USER009**, **EMP** and **USER** are the identity codes respectively.

Please refer Figure 146

The screenshot shows the Site Config interface with the following details:

- Top Navigation:** Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (highlighted), More.
- Left Sidebar (Site Preferences):** General (highlighted with red box b), Ethnic Codes, Identity Codes (highlighted with red box c).
- Current View:** Home > Site Config > General > Identity Codes.
- Table Data:**

Employee	empp	Background Agency	BGCK
Users	USER	Requisition	REQ
Description	Identification codes for different categories of people in an organization		
- Right Side Actions:** Pin to shortcuts, Edit icon (highlighted with red box e).

Figure 146

- Click **Site Config** in the top menu
- Click **General** on the left menu panel
- Click **Identity Codes** in the submenu
- Your default identity code details will be displayed here
- Click **Edit icon**

Please refer Figure 147

The screenshot shows the Site Config interface with the following details:

- Top Navigation:** Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config (highlighted), More.
- Left Sidebar (Site Preferences):** General, Ethnic Codes, Identity Codes (highlighted with red box f).
- Current View:** Home > Site Config > General > Identity Codes > Edit.
- Form Fields:**

Employee *	empp	Background Agency *	BGCK
Users *	USER	Requisition *	REQ
- Bottom Buttons:** UPDATE (highlighted with red box g), Cancel.

Figure 147

- Edit the details
- 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 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

Action	Currency	Currency Code	Description
	US Dollar	USD	

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

SAVE Cancel

Figure 151

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

Currency Conversions

Please refer Figure 152

Action	Base Currency	Target Currency	Exchange Rate	Active Start Date	Active End Date	Description
	US Dollar	Indian Rupee	70	01.09.2016	30.09.2016	

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

Base Currency *
Select Base Currency

Target Currency *
Select Target Currency

Exchange Rate ? *

Active Start Date ? *

Active End Date ? *

Description:
200 characters remaining (200 maximum)

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

Menu Name	Last Modified By	Employee ID	Action	Last Modified Record
Leave Request	Jim Kerry	empp008	Add	19.09.2016 at 08:05 AM
Categories	Super Admin	empp0001	Edit e	View Record d
Countries	Super Admin	empp0001	Delete	19.09.2016 at 07:14 AM
View/Manage Policy Documents	Super Admin	empp0001	Edit	View Record
Categories	Super Admin	empp0001	Edit	View Record
Settings	Super Admin	empp0001	Edit	View Record
Settings	Super Admin	empp0001	Add	View Record
Settings	Super Admin	empp0001	Delete	19.09.2016 at 04:46 AM
Roles & Privileges	Super Admin	empp0001	Edit	View Record
Employees	Super Admin	empp0001	Edit	View Record

Figure 154

- Click **Logs** in the top menu
- Click **Activity Log** in the left menu panel
- You can view the activity logs here
- Click on **View Record** to view the modified record.
- 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:

Categories - Edit

User	Employee ID	Date	Record
Super Admin	empp0001	19.09.2016 at 07:17 AM	View Record

Records per page ▾

[CLOSE](#)

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

13.2 How do I view User Logs?

Please refer Figure 155

The screenshot shows the application's main navigation bar with various modules like Dashboard, Self Service, Service Request, HR, Appraisals, etc. A red box labeled 'b' highlights the 'User Log' link under the 'Activity Log' section. On the left, there's a sidebar with 'Shortcuts' and three icons. A red box labeled 'c' points to the 'User log' link in this sidebar. The main content area is titled 'User log' and displays a table of user login logs. A red box labeled 'a' points to the 'Logs' option in a dropdown menu on the right side of the screen. The table data is as follows:

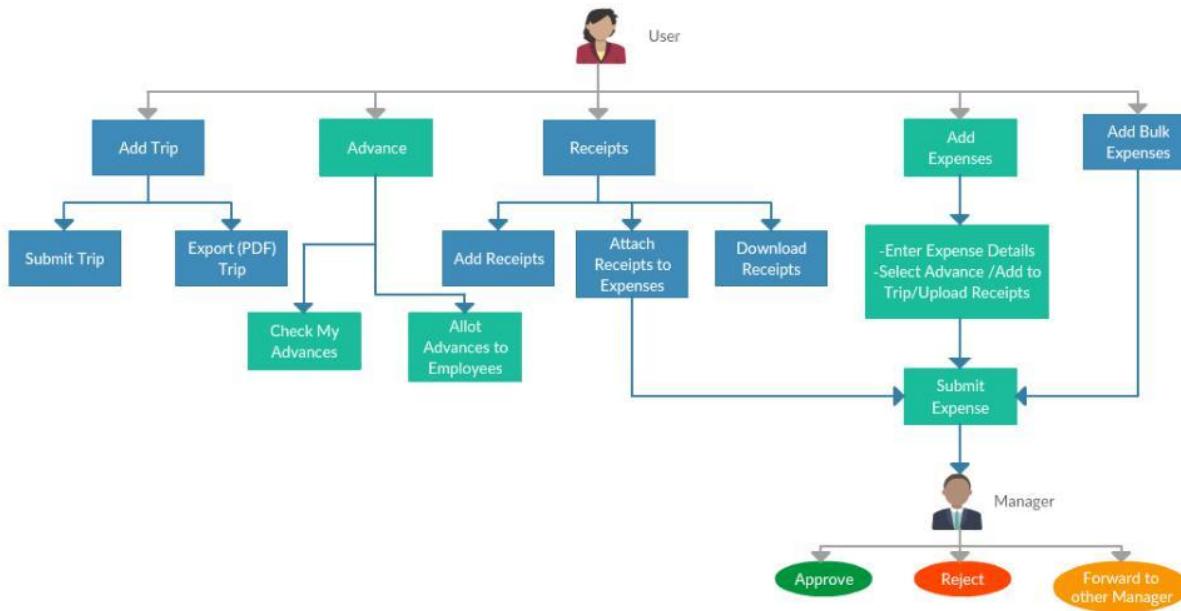
User	Employee ID	Group	Role	Email	Login Time	IP Address
Super Admin	empp0001		Super Admin	radhika.vemanedi@sagarsoft.in	19.09.2016 at 08:30 AM	192.168.169.105
Johnty Rodhes	empp004	Manager	Manager	rodes@mailinator.com	19.09.2016 at 08:08 AM	192.168.169.112
Jim Kerry	empp008	Employees	Employee	kery@mailinator.com	19.09.2016 at 08:04 AM	192.168.169.112
Super Admin	empp0001		Super Admin	radhika.vemanedi@sagarsoft.in	19.09.2016 at 08:02 AM	192.168.169.112
Super Admin	empp0001		Super Admin	radhika.vemanedi@sagarsoft.in	19.09.2016 at 07:25 AM	192.168.169.105
Robinson andy	BGCK197	External Users - Agency user		robinson123@mailinator.com	19.09.2016 at 07:22 AM	192.168.169.105

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

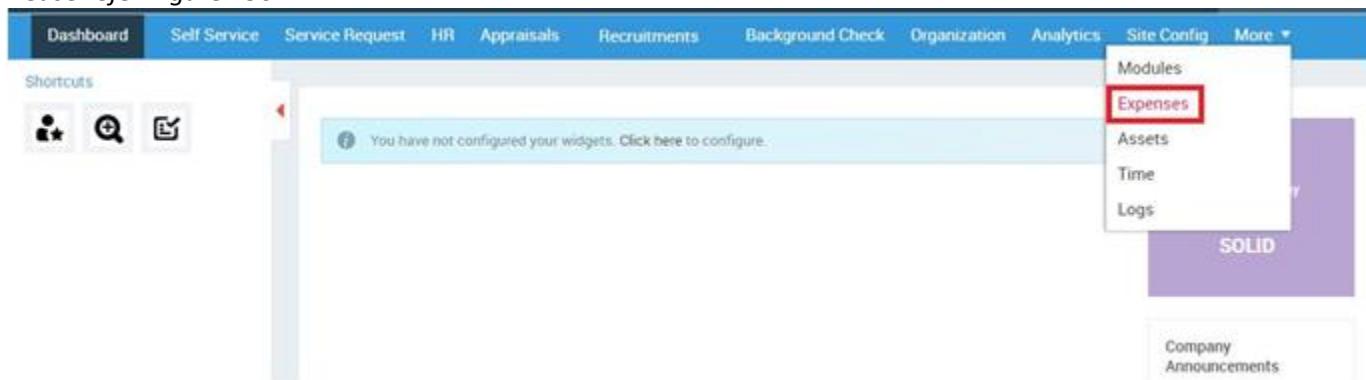


Figure 156

- Click **Expenses** in the top menu

Please refer Figure 157

The screenshot shows the 'Category' list under the 'Expenses' module. The left sidebar has 'Category' selected (highlighted with a red box). The main area shows a table of expense categories:

Action	Expense Category Name	Created By	Created Date
	Travel	Super Admin	09/12/2016
	Food	Super Admin	09/12/2016
	Hardware	Super Admin	09/12/2016
	Boarding	Super Admin	09/09/2016

At the bottom, there are buttons for '+ Add' (highlighted with a red box) and 'C P' (highlighted with a red box). The footer shows 'Records per page' and a dropdown set to '20'.

Figure 157

- Click **Category** on the left menu panel

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

Or

Please refer Figure 158

The screenshot shows the 'Expenses' section of a software interface. On the left, there's a sidebar with links like 'Category', 'Payment Mode', 'Receipts', 'Trips', 'Advances', and 'My Employee Expenses'. Below the sidebar are three icons: a user profile, a magnifying glass, and a document. The main area is titled 'Expenses' and lists columns: Expense Name, Project, Client, Category, Expense date, Amount, and Reimbursable. A yellow bar at the bottom says 'No data found'. In the top right corner of the expense list area, there's a red box labeled 'd' around the '+Add' button. To the right of the list, there's a red box labeled 'e' around the 'Category' dropdown menu.

Figure 158

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

Please refer Figure 159

The screenshot shows the 'Category' add form. On the left, there's a sidebar with links like 'Category', 'Payment Mode', 'Receipts', 'Trips', 'Advances', and 'My Employee Expenses'. Below the sidebar are three icons: a user profile, a magnifying glass, and a document. The main area has a breadcrumb trail: Home > Expenses > Category > Add. It has fields for 'Expense Category Name' (with 'Lodging' typed in) and a 'Status' dropdown. At the bottom are 'SAVE' and 'Cancel' buttons. A red box labeled 'f' highlights the 'Expense Category Name' input field. A red box labeled 'g' highlights the 'SAVE' button.

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

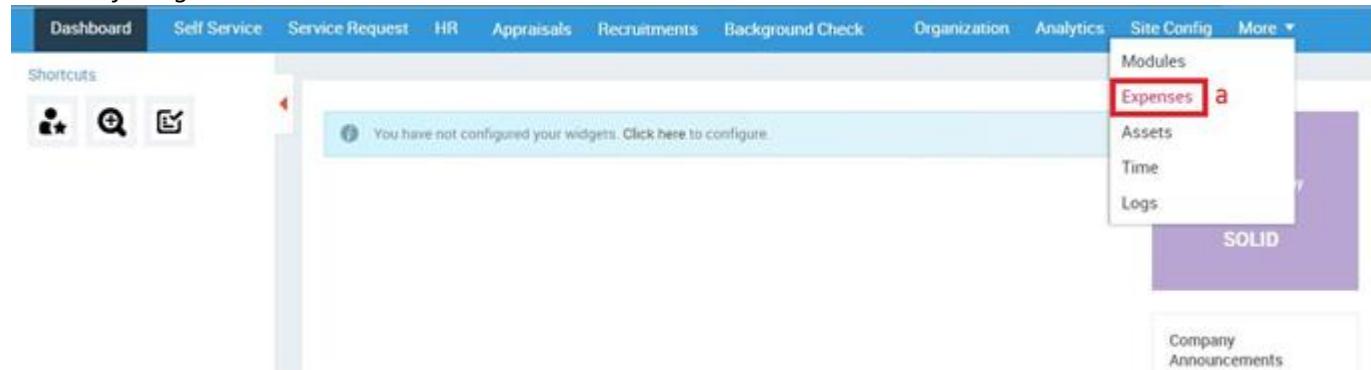


Figure 160

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

Please refer Figure 161

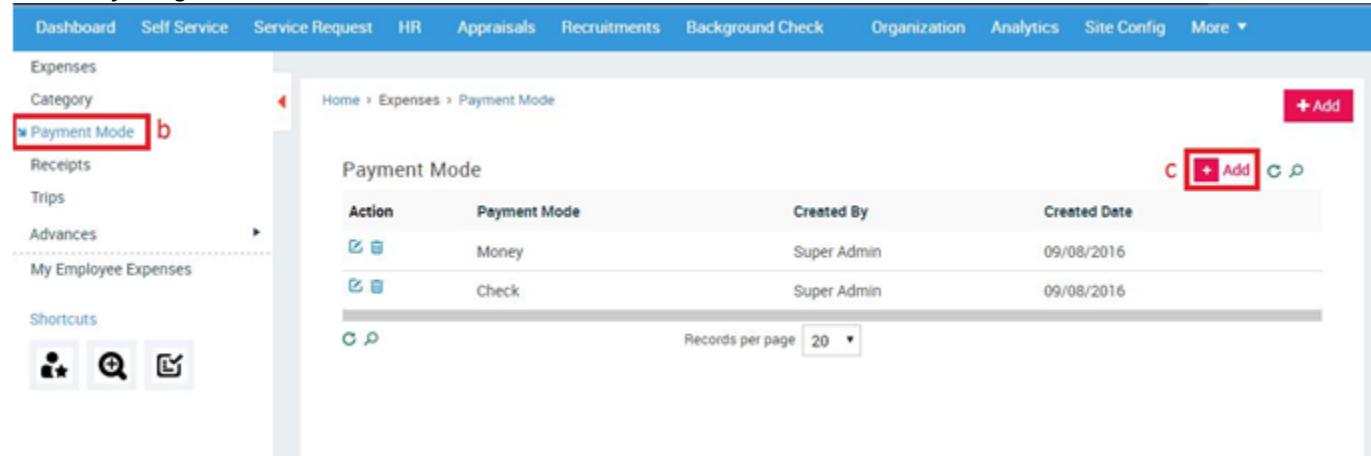


Figure 161

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

Or

Please refer Figure 162

The screenshot shows the 'Payment Mode' list page within the 'Expenses' module. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists 'Expenses', 'Category', and 'Payment Mode' (which is expanded). Under 'Payment Mode', there are links for 'Receipts', 'Trips', 'Advances', and 'My Employee Expenses'. A 'Shortcuts' section contains icons for users, search, and export. The main content area displays a table titled 'Payment Mode' with two rows:

Action	Payment Mode	Created By	Created Date
<input checked="" type="checkbox"/>	Money	Super Admin	09/08/2016
<input checked="" type="checkbox"/>	Check	Super Admin	09/08/2016

Below the table are 'Records per page' dropdown and search/filter icons. Red callout boxes labeled 'd' and 'e' point to the '+Add' button in the top right corner and the 'Payment Mode' link in the sidebar respectively.

Figure 162

- d. Click **+Add** on the top right corner
- e. Select **Payment Mode**

Please refer Figure 163

The screenshot shows the 'Payment Mode' add form page within the 'Expenses' module. The top navigation bar and sidebar are identical to Figure 162. The main content area shows a form with a 'Payment Mode *' field containing 'Bank Draft' (labeled 'f'). Below the field are 'SAVE' and 'Cancel' buttons (labeled 'g'). Red callout boxes labeled 'f' and 'g' point to the 'Bank Draft' value in the input field and the 'SAVE' button respectively.

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

- Click **Expenses** in the top menu
- Click **Expenses** in the left menu panel
- Click **+Add** button on the right side

Please refer Figure 165

Figure 165

- Enter the required details
- Not functional in the current version
- 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).
- 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
- 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

Action	Expense Name	Project	Client	Category	Expense date	Amount	Reimbursable	Status
	Travel Allowance	SearchEngine	US Client	Travel	09/07/2016	2000.00	No	saved
	travel	SearchEngine	US Client	Travel	09/01/2016	5000.00	No	submitted

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

Expense #	Travel Allowance	Client	US Client
Project	SearchEngine	Reimbursable	No
Exchange Rate	0.00	Payment Mode	Money
Payment Ref #			
Advance	No Advance		
Description			

Figure 167

- d. Click **Submit** button

A confirmation message will be displayed.

Please refer Figure 168

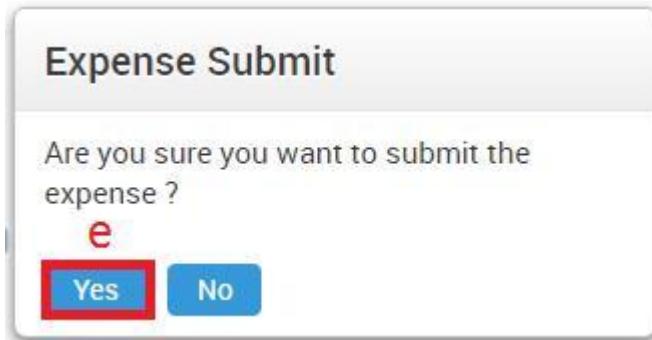


Figure 168

- 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

The screenshot shows a software interface for managing expenses. The top navigation bar has tabs: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, **Expenses** (highlighted with a red box), and Time. A left sidebar panel (b) contains links: Receipts, Trips, Advances, My Employee Expenses, and Shortcuts (with a note: "You have not configured your shortcut icons. Click here to configure"). The main content area (a) shows a list of expenses under the heading "Expenses". The table columns are: Action, Expense Name, Project, Client, Category, Expense date, Amount, Reimbursable, and Status. Two rows of data are visible:

Action	Expense Name	Project	Client	Category	Expense date	Amount	Reimbursable	Status
C	Travel Allowance	SearchEngine	US Client	Travel	09/07/2016	2000.00	No	saved
C	travel	SearchEngine	US Client	Travel	09/01/2016	5000.00	No	submitted

At the bottom, there are search and filter icons, and a "Records per page" dropdown set to 20.

Figure 169

- Click **Expenses** in the top menu
- Click **Expenses** in the left panel
- Click **View** button in the action column

Please refer Figure 170

The screenshot shows the 'Expenses' view in a software application. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses' (which is selected and highlighted in blue), and 'Time'. On the left, a sidebar menu lists 'Receipts', 'Trips', 'Advances', 'My Employee Expenses', and 'Shortcuts' (with a note about configuring shortcut icons). The main content area displays a travel allowance expense with the following details:

Expense #	Travel Allowance	Client	US Client
Project	SearchEngine	Reimbursable	No
Exchange Rate	0.00	Payment Mode	Money
Payment Ref #			
Advance	No Advance		
Description			

At the top right of the expense view, there are 'Clone' and 'Export expense' buttons. The 'Export expense' button is highlighted with a red box.

Figure 170

- 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

The screenshot shows the 'Expenses' list view in a software application. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses' (selected and highlighted in blue), and 'Time'. On the left, a sidebar menu lists 'Receipts', 'Trips', 'Advances', 'My Employee Expenses', and 'Shortcuts' (with a note about configuring shortcut icons). The main content area displays a list of expenses:

Action	Expense Name	Project	Client	Category	Expense date	Amount	Reimbursable	Status
	Travel Allowance	SearchEngine	US Client	Travel	09/07/2016	2000.00	No	saved
	travel	SearchEngine	US Client	Travel	09/01/2016	5000.00	No	submitted

At the top right of the list view, there are '+ Add' and 'Clone' buttons. The first expense's edit icon is highlighted with a red box.

Figure 171

- Click Expenses in the top menu
- Click Expenses on the left menu panel

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

Please refer Figure 172

The screenshot shows a web-based application interface for managing expenses. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (which is the active tab), and Time. On the left, a sidebar menu lists Expenses, Receipts, Trips, Advances, My Employee Expenses, and Shortcuts. The main content area displays a single expense record titled "Travel Allowance INR-2000.00". The status is listed as "Submitted". A red box labeled "d" highlights the "Clone" button. Below the title, the category is "Travel". The expense details table contains the following data:

Expense #	Travel Allowance	Client	US Client
Project	SearchEngine	Reimbursable	No
Exchange Rate	0.00	Payment Mode	Money
Payment Ref #			
Advance	No Advance		
Description			

At the bottom right of the expense card, there is an "Export expense" link.

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

The screenshot shows the "Edit" screen for adding a new expense. The top navigation bar and sidebar are identical to Figure 172. The main form is pre-filled with the details from the cloned expense. A red box labeled "e" highlights the "SAVE" button at the bottom left. The pre-filled fields include:

- Expense Name:** Accommodation
- Category:** Traveling
- Project:** Delta Project
- Expense date:** 2016-09-01
- Amount:** INR 5000.00 (equivalent to USD 65.03)
- Reimbursable:** No (radio button selected)
- Select Advance:** No Advance
- Payment Mode:** Money
- Payment Ref #:** 12313
- Add To Trip:** Trip To Canada
- Description:** (empty field)
- Upload Receipts:** (button)

Figure 173

- e. Click **SAVE** button

14.7 How do I approve/reject Employee Expenses?

Please refer Figure 174

The screenshot shows the Expenses module interface. The top navigation bar has tabs: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (which is highlighted with a red box), and Time. On the left, a sidebar menu includes: Expenses (highlighted with a red box), Receipts, Trips, Advances, and My Employee Expenses (highlighted with a red box). Below the sidebar is a section for Shortcuts with a note: "You have not configured your shortcut icons. Click here to configure". The main content area is titled "Employee Expenses" and displays a table of expense items. The table columns are: Action, Employee, Expense, Trip, Category, Expense date, Currency, Amount, and Status. Two rows are listed:

Action	Employee	Expense	Trip	Category	Expense date	Currency	Amount	Status
	Arun JJ	Travel Allowance		Travel	2016-09-07	Indian Rupee	2000.00	submitted
	Arun JJ	travel		Travel	2016-09-01	Indian Rupee	5000.00	submitted

At the bottom right of the table, there are buttons for "Records per page" (set to 20) and a search icon. A red box labeled 'a' highlights the "Expenses" tab in the top navigation. A red box labeled 'b' highlights the "Expenses" link in the sidebar. A red box labeled 'c' highlights the "My Employee Expenses" link in the sidebar. A red box labeled 'd' highlights the "View" icon in the first row's action column.

Figure 174

- Click **Expenses** in the top menu
- Click **Expenses** in the left menu panel
- Click **My Employee Expenses** in the submenu
- Click **View** icon in the action column

Please refer Figure 175

The screenshot shows the Expenses module interface, similar to Figure 174 but focused on a single expense item. The top navigation bar and sidebar are identical. The main content area shows a detailed view of an expense. At the top, it says "Travel Allowance INR-2000.00", "Status: Submitted", and "Category: Travel". To the right are buttons for "Export expense", "Forward", "Approve" (highlighted with a red box), and "Reject". Below this, there is a table with the following data:

Expense #	Travel Allowance	Client	US Client
Project	SearchEngine	Reimbursable	No
Exchange Rate	0.00	Payment Mode	Money
Payment Ref #			
Advance	No Advance		
Description			

A red box labeled 'e' highlights the "Approve" button.

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

A screenshot of the Employee Expenses page. The top navigation bar has tabs: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (highlighted with a red box and labeled 'a'), and Time. The left sidebar has links: Expenses (highlighted with a red box and labeled 'b'), Receipts, Trips, Advances, and My Employee Expenses (highlighted with a red box and labeled 'c'). A message says "You have not configured your shortcut icons. Click here to configure". The main content area shows a table of Employee Expenses with columns: Action, Employee, Expense, Trip, Category, Expense date, Currency, Amount, and Status. Two rows are listed:

Action	Employee	Expense	Trip	Category	Expense date	Currency	Amount	Status
	Arun JJ	Travel Allowance		Travel	2016-09-07	Indian Rupee	2000.00	submitted
	Arun JJ	travel		Travel	2016-09-01	Indian Rupee	5000.00	submitted

There are also "New" and "Print" buttons at the bottom right.

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

The screenshot shows the 'Expenses' module interface. On the left, there's a sidebar with links like 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses' (which is selected and highlighted in blue), and 'Time'. Under 'Expenses', there are categories: 'Receipts', 'Trips', 'Advances', and 'My Employee Expenses' (which is selected and highlighted in green). A message in 'My Employee Expenses' says: 'You have not configured your shortcut icons. Click here to configure'. Below this, there's a 'Shortcuts' section. The main content area shows a travel expense detail. At the top, it says 'travel INR- 5000.00', 'Status: Submitted', 'Category: Travel', and 'Export expense'. There are three buttons: 'Forward' (highlighted with a red box and labeled 'e'), 'Approve', and 'Reject'. Below these buttons is a table with expense details:

Expense #	travel	Client	US Client
Project	SearchEngine	Reimbursable	No
Exchange Rate	0.00	Payment Mode	Money
Payment Ref #	#46546		
Advance	INR 0.00		
Description			

Figure 178

e. Click **Forward** option

A small pop up window will open

Please refer Figure 178

The screenshot shows a 'Forward expense to' dialog box. It has a title bar 'Forward expense to' and a close button. Inside, there are four recipient names listed with 'Forward' buttons to their right. The second 'Forward' button is highlighted with a red box and labeled 'f'. At the bottom right of the dialog is a 'View More' button.

John Michael	Forward
Ron Born	Forward f
Rose Mary	Forward
Jim Carol	Forward

View More

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

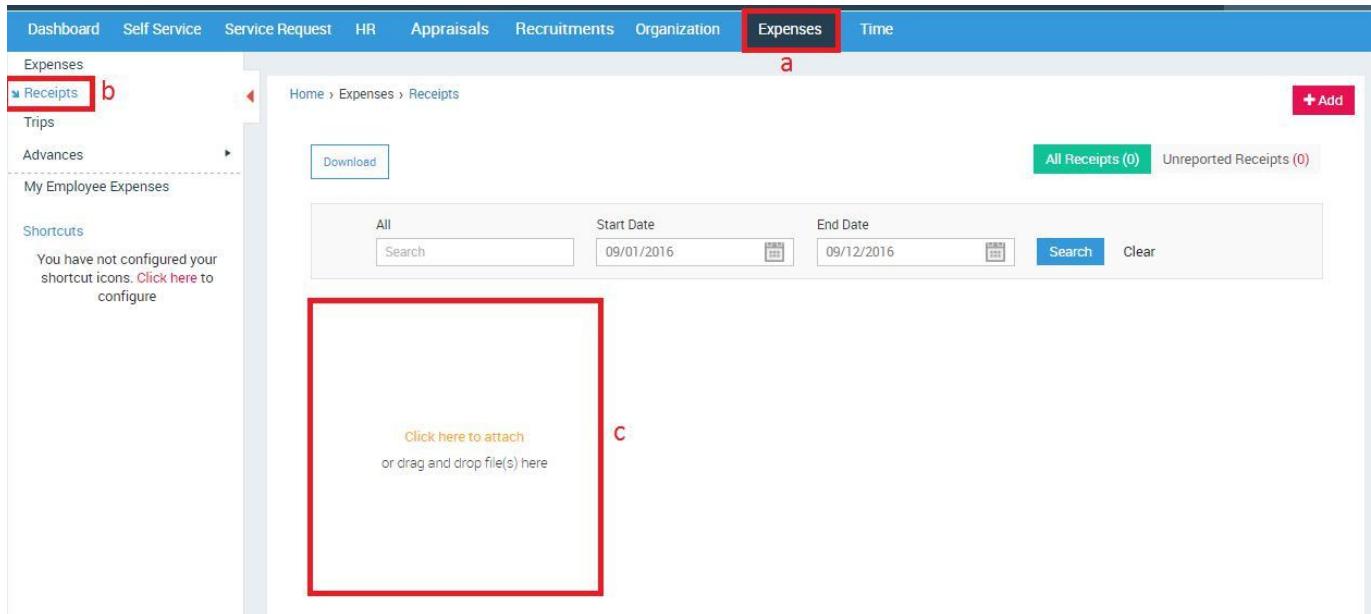


Figure 179

- 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

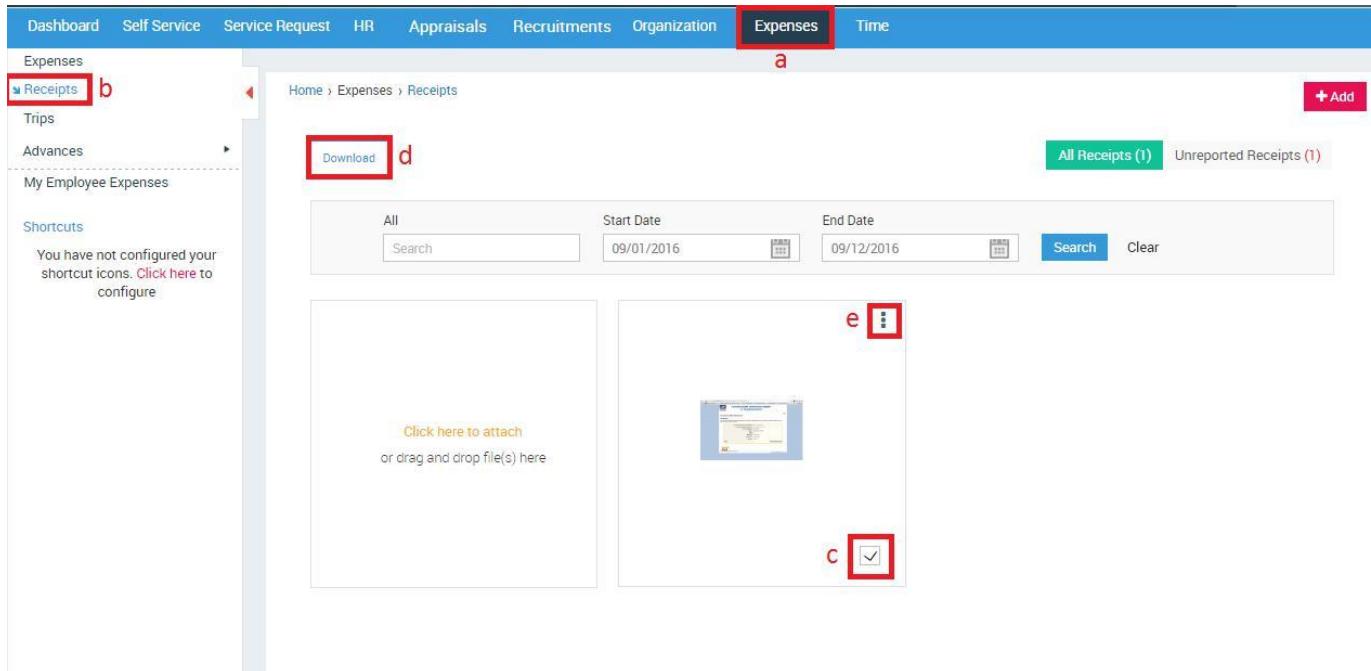


Figure 180

- 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

The screenshot shows the 'Receipts' section of the Expenses module. On the left sidebar, under 'Shortcuts', there is a note: 'You have not configured your shortcut icons. Click here to configure'. The main area displays search filters for 'Start Date' (09/01/2016) and 'End Date' (09/23/2016), with 'All' selected. Below the filters, there is a placeholder text: 'Click here to attach or drag and drop file(s) here'. To the right, a receipt for 'USD-1' is shown with a context menu open. The menu options are: Remove From Expense, Edit Expense, Add To Trip, Delete Receipt, and Download. The 'Download' option is highlighted with a red border.

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

The screenshot shows the 'Receipts' section of the Expenses module. The left sidebar includes a note about未配置的快捷图标。The main area shows search filters for 'Start Date' (09/01/2016) and 'End Date' (09/12/2016), with 'All' selected. Below the filters, there is a placeholder text: 'Click here to attach or drag and drop file(s) here'. To the right, a receipt is shown with a small thumbnail image. At the top right of the main area, there are two buttons: 'All Receipts (1)' and 'Unreported Receipts (1)', with 'Unreported Receipts (1)' highlighted by a red box.

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

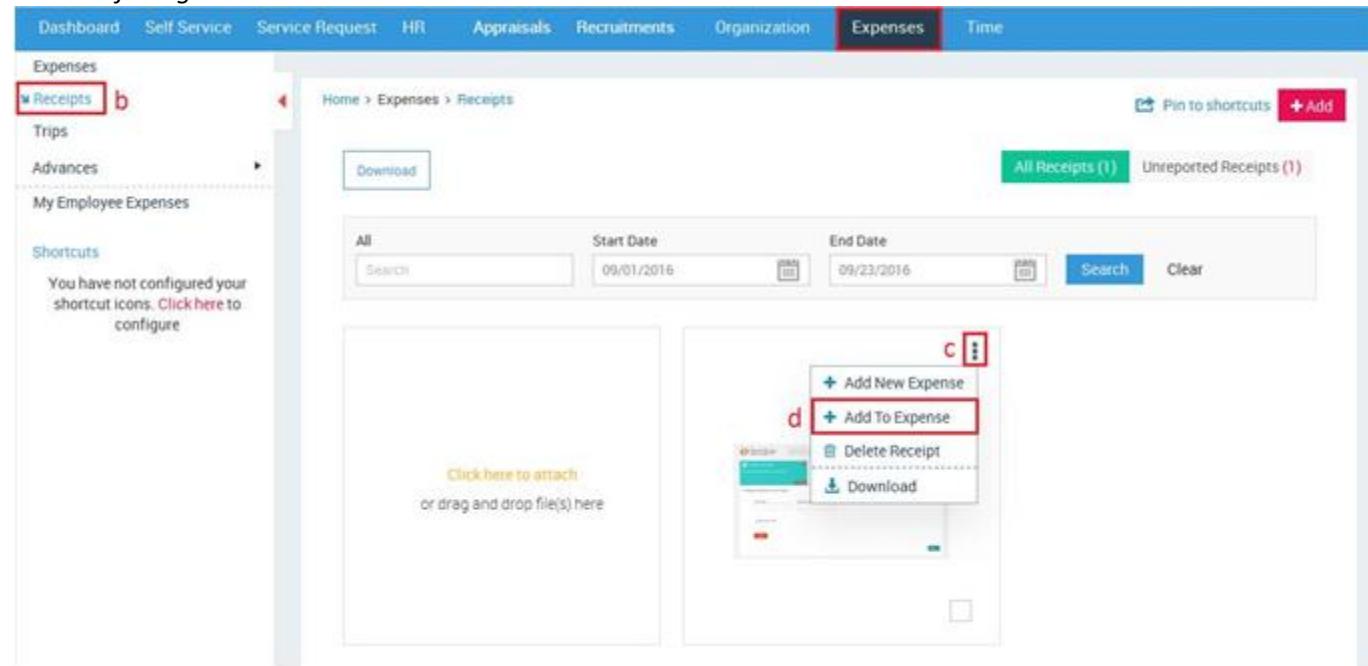


Figure 183

- 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:

The screenshot shows the 'Expenses' module. In the top navigation bar, 'Expenses' is selected. On the left, there is a sidebar with options like 'Receipts' (highlighted with a red box), 'Trips', 'Advances', and 'My Employee Expenses'. The main area shows a search bar with 'All' selected, and date fields for 'Start Date' (09/01/2016) and 'End Date' (09/23/2016). Below the search bar is a green button labeled 'All Receipts (1)' and a link 'Unreported Receipts (0)'. A red box highlights a receipt entry for 'Tickets(Travel)' with a value of 'USD-100.00' and the status 'Saved'. At the bottom left, there is a placeholder text 'Click here to attach or drag and drop file(s) here'.



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

The screenshot shows the Expenses module interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (which is highlighted in red), and Time. On the left, a sidebar lists Expenses, Receipts (highlighted with a red box labeled 'b'), Trips, Advances, and My Employee Expenses. Under Shortcuts, there is a message about configuring icons. The main content area shows a breadcrumb path: Home > Expenses > Receipts. It features a 'Download' button, search filters for Start Date (09/01/2016) and End Date (09/23/2016), and buttons for All Receipts (1) and Unreported Receipts (0). Below these are two columns: one for attachments and another for receipt details. A context menu is open over a receipt labeled 'USD-1 saved'. The menu options are: Remove From Expense, Edit Expense (with a checked checkbox), Add To Trip, Delete Receipt (highlighted with a red box labeled 'd'), and Download. A red box labeled 'c' points to the menu icon.

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

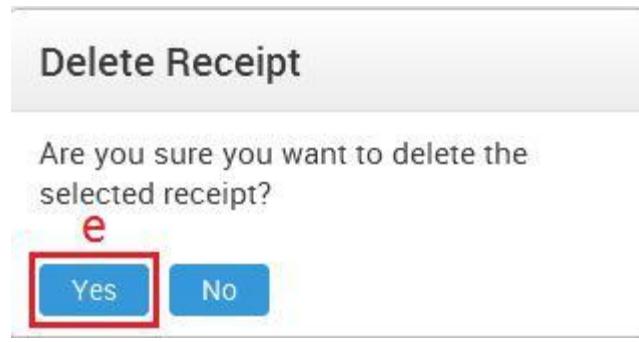


Figure 186

- 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

A screenshot of the application interface showing the "Trips" section. The top navigation bar has tabs for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses (highlighted with a red box labeled "a"), and Time. The left sidebar menu includes Expenses, Receipts, Trips (highlighted with a red box labeled "b"), Advances, and My Employee Expenses. A "Shortcuts" section with a configuration note is also present. The main content area shows a table titled "Trips" with columns: Action, Trip, From date, To date, and Description. A message "No data found" is displayed. A red box labeled "C" highlights the "+Add" button in the top right corner of the content area.

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 shows the 'Trips' add form in the HRMS application. The 'Trip' field is set to 'Newyork', 'From date' is '09/07/2016', 'To date' is '09/14/2016', and 'Description' is 'Client Meeting'. A red bracket labeled 'd' points to the 'Description' field. A red box labeled 'e' points to the 'SAVE' button.

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 shows the 'Employee Advances' list in the HRMS application. A table displays one record:

Action	Employee	Amount	Utilized
	Arun JJ	2000.00	partial

Records per page: 20

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

The screenshot shows the 'Employee Advances' add form. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses' (highlighted in blue), and 'Time'. The left sidebar has links for 'Receipts', 'Trips', 'Advances' (selected), 'My Advances' (highlighted in red), 'Employee Advances' (highlighted in green), 'My Employee Expenses', and 'Shortcuts'. The main form fields include 'Employee *' (dropdown, labeled e), 'Project' (dropdown, labeled f), 'Amount *' (dropdown, labeled INR), 'Payment Mode *' (dropdown, labeled Select Payment), 'Payment Ref #' (text input), 'Description' (text input with placeholder '200 characters remaining (200 maximum)'), and a 'SAVE' button (labeled h). A red bracket on the right side groups the 'Amount *' and 'Payment Mode *' fields, labeled g.

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

The screenshot shows the 'My Advances' summary page. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Recruitments', 'Organization', 'Expenses' (highlighted in blue), and 'Time'. The left sidebar has links for 'Receipts', 'Trips', 'Advances' (highlighted in red), 'My Advances' (highlighted in green), 'Employee Advances' (highlighted in blue), 'My Employee Expenses', and 'Shortcuts'. The summary section displays four boxes: '2000.00 Total Advance' (red box b), '1500.00 Utilized' (green box c), '500.00 Returned' (blue box d), and '0.00 Balance' (orange box e). Below this is a search bar and a detailed view of a specific advance entry: 'INR-2000.00 On 09/09/2016 Added by James Stiles' (boxed area f).

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

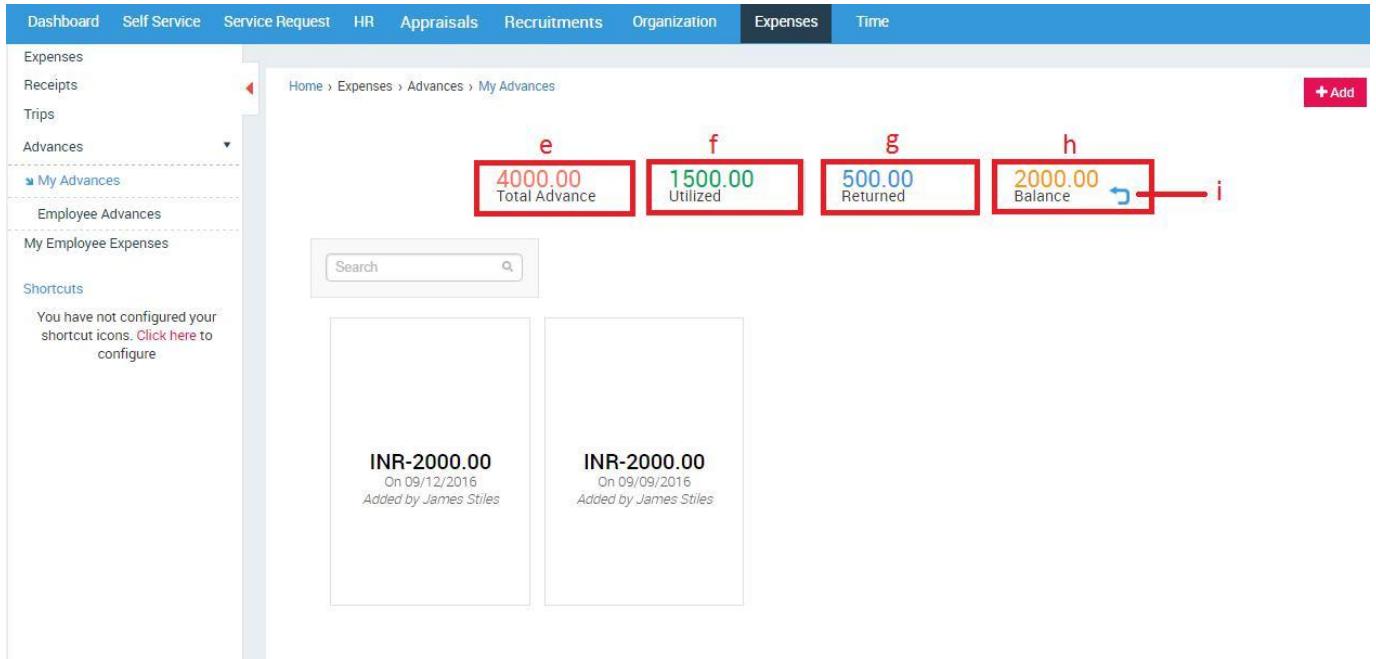


Figure 192

- 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

Return Advance

Amount * Payment Mode * Payment Ref #

INR Select Payment

Return To * Description

Select Employee

200 characters remaining (200 maximum)

SAVE Cancel

j

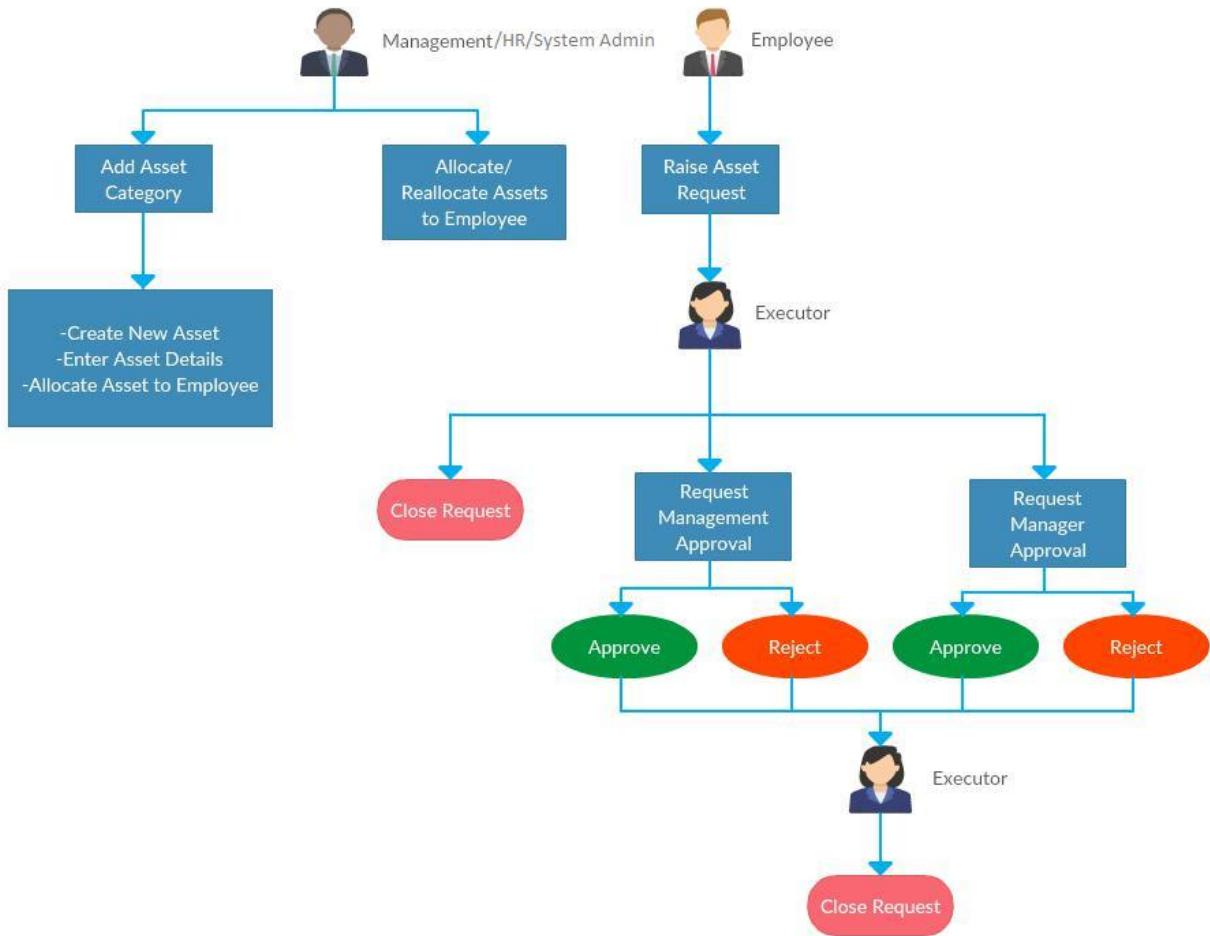
k

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

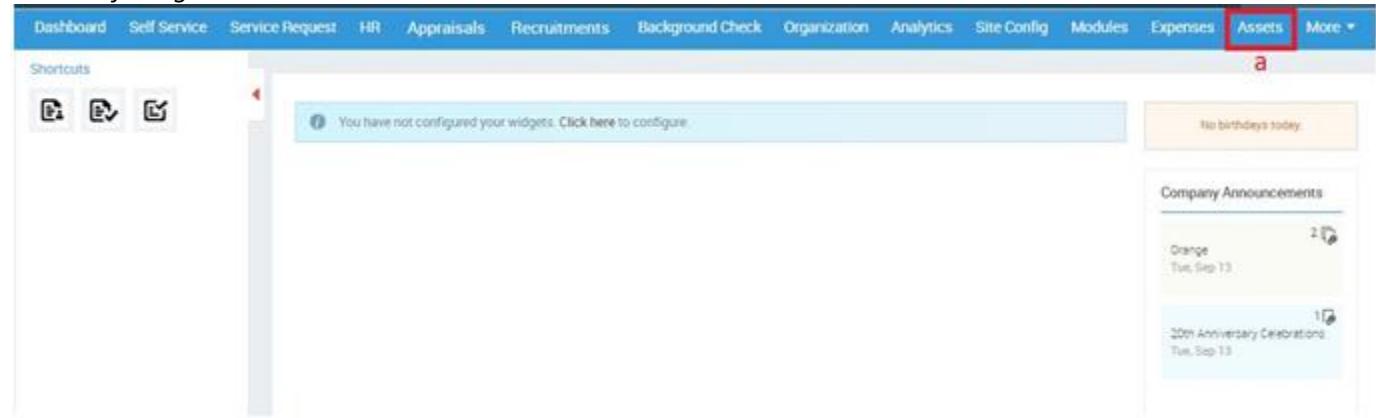


Figure 194

- Click **Assets** in the top menu

Please refer Figure 195

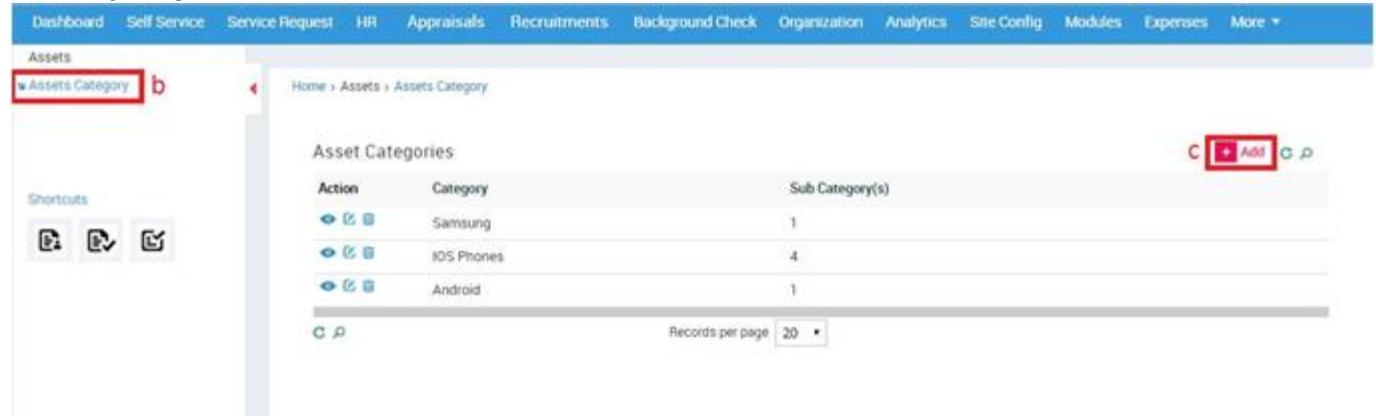


Figure 195

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

Please refer Figure 196

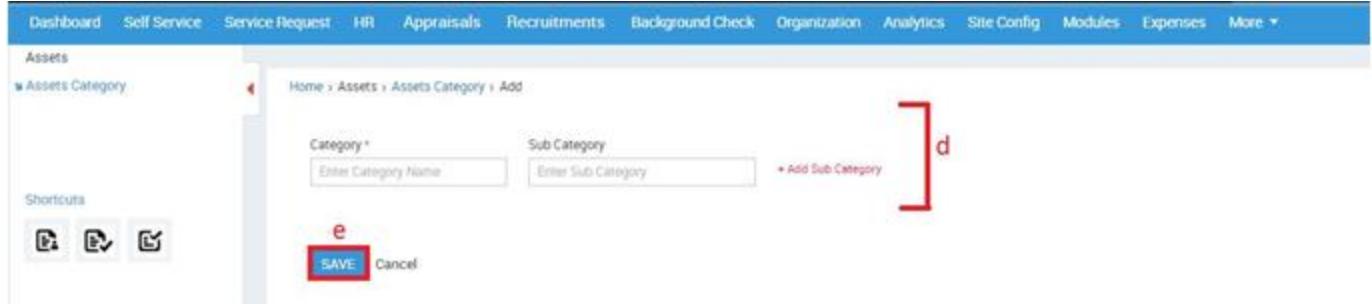


Figure 196

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

15.2 How do I add an Asset?

Please refer Figure 197

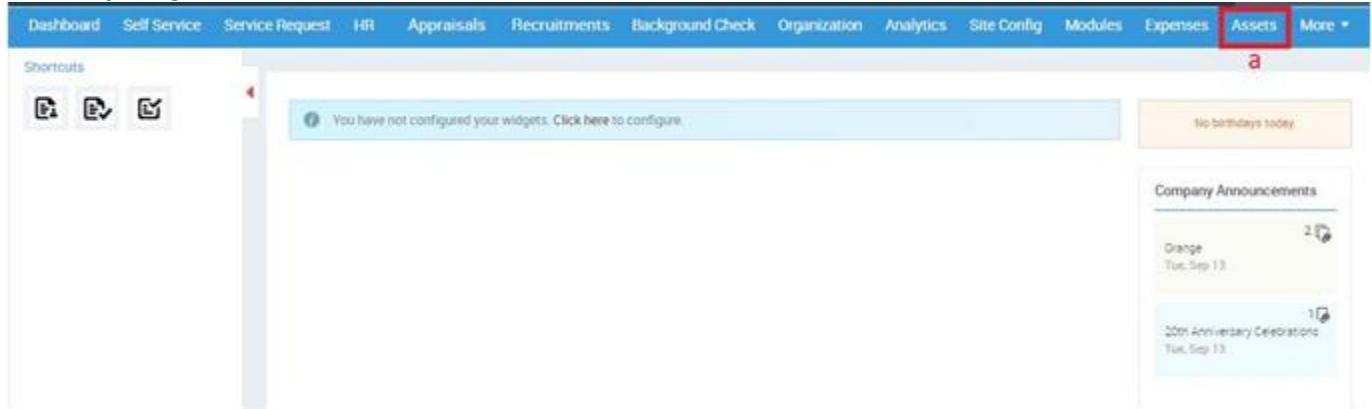


Figure 197

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

Please refer Figure 198

The screenshot shows a software interface for managing assets. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. Below the navigation bar, a left sidebar has a 'Assets' section with a red box labeled 'b'. Under 'Assets Category', there are three items: 'Samsung Tab', 'Nexus', and 'Iphone'. To the right of the sidebar is a main content area titled 'Assets' with a table. The table columns are: Action, Asset Name, Category, Sub Category, Company Asset Code, Working Condition, Asset Classification, and Allocated To. The data in the table is as follows:

Action	Asset Name	Category	Sub Category	Company Asset Code	Working Condition	Asset Classification	Allocated To
	Samsung Tab	Samsung	Samsung-Family	233323	Yes	Business Unit	James HUL
	Nexus	Android	Nexus	678	Yes	Department	Jim Carry
	Iphone	iOS Phones	Iphone 6 S	435	Yes	Department	Tom Hanks

At the bottom of the table, there are buttons for 'C P' and 'Records per page' set to 20. There are also 'Add' and 'Print' buttons at the top right of the main content area.

Figure 198

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

Please refer Figure 199

The screenshot shows a 'Add' form for a new asset. The top navigation bar is identical to Figure 198. The left sidebar has an 'Assets' section with a red box labeled 'b'. The main form has several input fields:

- Category ***: A dropdown menu with 'Select Asset Category' and a '+Add Category' link.
- Sub Category**: A dropdown menu with 'Select Sub Category' and a '+Add Sub Category' link.
- Company Asset Code ***: An empty text input field.
- Asset Name ***: An empty text input field.
- Location ***: A dropdown menu with 'Select Location'.
- Is Working ***: Radio buttons for 'Yes' (selected) and 'No'.
- Allocate To**: A dropdown menu with 'Select Allocate To'.
- Asset Classification ***: A dropdown menu with 'Select Classification'.
- Purchase Date**: A date picker input field.
- Invoice Number**: An empty text input field.
- Manufacturer**: An empty text input field.
- Key Number**: An empty text input field.
- Warranty ***: Radio buttons for 'Yes' (selected) and 'No'.
- Warranty / AMC End Date**: A date picker input field.
- Notes**: A text area with placeholder text '300 characters remaining'.
- Upload Image(s)**: A link with an upload icon.

A red bracket labeled 'd' points to the right side of the form, and a red box labeled 'e' points to the 'SAVE' button at the bottom left.

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

The screenshot shows the 'Self Service' section of a HR application. The top navigation bar includes links for Dashboard, Self Service (highlighted with a red box and labeled 'a'), Service Request, HR, Appraisals, Recruitments, Organization, Expenses, and Time.

The left sidebar menu lists various options under 'Shortcuts', including My Details (highlighted with a red box and labeled 'b'), Leaves, My Holiday Calendar, My Team, and several unconfigured shortcut icons. Below this is a list of other employee details like Official, Documents, Leaves, Salary, Personal, Contact, Skills, Job History, Experience, Education, Training & Certification, Medical Claims, Disability, Dependency, Visa and Immigration, Corporate Card, Work Eligibility, and Additional Details. The 'Asset Details' option is highlighted with a red box and labeled 'c'.

The main content area displays 'My Details' for Mr. James HUL, showing Employee Name, Employee Id, Email Id, and Contact Number. It also shows a list of 'Assets' with one entry: Asset Name 'Samsung Tab' and Allocated date '09/14/16'. A red bracket labeled 'd' groups the 'Assets' section and the 'Asset Details' link in the sidebar.

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

The screenshot shows the Service Request module's 'My request summary' page. At the top, there are tabs for Dashboard, Self Service, Service Request (which is highlighted), HR, Appraisals, Recruitments, Organization, Expenses, and Time. A red box labeled 'b' highlights the 'Service Request' tab. On the left, a sidebar shows a list of requests: Open (1), Closed (1), Rejected (0), and Cancelled (0). A red box labeled 'a' highlights the 'My request summary' link. The main content area displays a table of requests with columns: Ticket#, Request For, Category, Request Type/Asset Name, Priority, Description, Raised By, Raised On, and Status. Two entries are listed: SD0006 (Asset, Samsung, Samsung Tab, Medium, 'Kindly provide the Samsung Tab', James HUL, 09/14/16, Management appro) and SD0005 (Asset, Samsung, Samsung Tab, Medium, 'Please replace my Keyboard.', James HUL, 09/14/16, Closed). A red box labeled 'c' highlights the '+Raise a Request' button in the top right corner. Below the table, there are links for 'G' and 'P', and a dropdown for 'Records per page' set to 20.

Figure 201

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

Please refer Figure 202

The screenshot shows the 'Add' page for a new service request. The top navigation bar includes tabs for Dashboard, Self Service, Service Request (highlighted), HR, Appraisals, Recruitments, Organization, Expenses, and Time. A red box labeled 'd' highlights the 'Request For' field, which is set to 'Asset'. To the right, there are fields for 'Asset Name' (Asset_hard_cable), 'Priority' (Medium), and 'Description' (Require a replacement.). A red bracket labeled 'e' groups the 'Asset Name', 'Priority', and 'Description' fields. At the bottom, there are 'SAVE' and 'Cancel' buttons, with a red box labeled 'f' highlighting the 'SAVE' button.

Figure 202

- Select **Asset** in the field 'Request For'
- Fill in the required details
- Click **SAVE** button

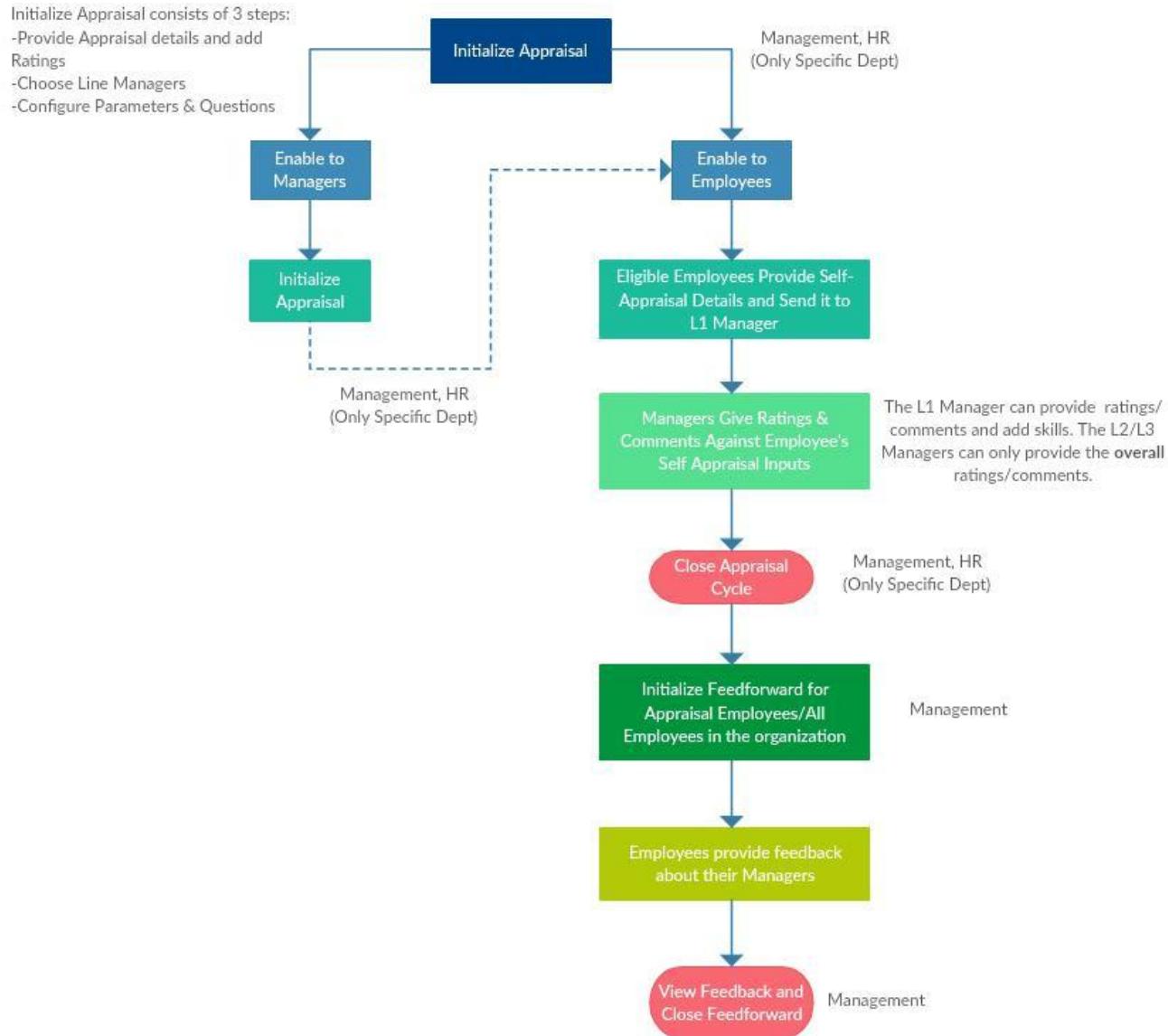


An asset name will only be populated if an asset is allocated to the employee. Also, please ensure the asset category is configured in:

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

Action	Parameter	Description
Eye icon	KRA	Key Result Area
Eye icon	dsg	
Eye icon	Generic	
Eye icon	KPI	Key Performance Index

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

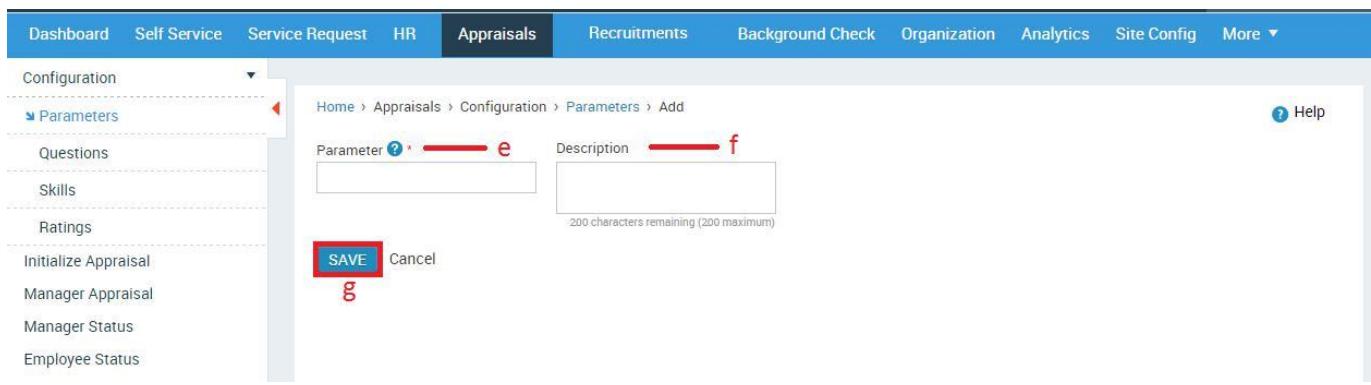


Figure 204

- 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

Appraisals			
Configuration	b	a	
Parameters			
Questions	c		d
Skills			
Ratings			
Initialize Appraisal			
Manager Appraisal			
Manager Status			
Employee Status			
Self Appraisal			
My Team Appraisal			
Appraisal History			
Feedforward			

The screenshot shows the 'Questions' list page. The top navigation bar is identical to Figure 204. The left sidebar shows Configuration, Parameters, Questions (selected), Skills, Ratings, Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, and Feedforward. The main content area shows a table of questions:

Action	Parameter	Question	Description
Eye icon	KRA	Verification	Static testing
Eye icon	Generic	fdgfd	
Eye icon	KRA	What is PMP	Project management
Eye icon	KPI	What is Metrix	Numbers
Eye icon	KPI	Validation	Dynamic testing
Eye icon	Generic	How long are you working on this project..	Tell us about your project details and p..
Eye icon	KRA	test question	
Eye icon	KRA	Explain at high level projects that you ..	Explain at high level projects that you ..

Red numbers 'a', 'b', 'c', and 'd' are overlaid on the 'Appraisals' tab, 'Configuration' link, 'Questions' link, and the '+Add' button respectively.

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

The screenshot shows the 'Appraisals' tab selected in the top navigation bar. On the left, a sidebar titled 'Configuration' has 'Skills' selected. The main content area shows a breadcrumb path: Home > Appraisals > Configuration > Questions > Add. It includes fields for 'Parameter*' (dropdown labeled e), 'Question?' (input field labeled g), 'Description' (input field labeled h), and a '200 characters remaining (200 maximum)' note. There are buttons for 'Add Parameter' (labeled f), 'ADD NEW QUESTION' (labeled i), and 'SAVE' (labeled j). A 'Cancel' button is also visible.

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

The screenshot shows the 'Appraisals' tab selected in the top navigation bar. On the left, a sidebar titled 'Configuration' has 'Skills' selected (highlighted with a red box). The main content area shows a breadcrumb path: Home > Appraisals > Configuration > Skills. It displays a table of skills with columns for 'Action', 'Skill', and 'Description'. The skills listed are fg, sfd, development, and Testing. There are buttons for 'Pin to shortcuts' and '+ Add' (highlighted with a red box). A search bar and a 'Records per page' dropdown are at the bottom.

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

Action	Appraisal Period	Business Unit	Department	Rating Type	Appraisal Status	Process Status
	Q2 Appraisal, 2018	Asiaglobal	Human Resource	1-5	Open	Enabled to Employees
	Q1 Appraisal, 2017	Asiaglobal	Quality Assurance	1-5	Open	Enabled to Employees

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

Business Unit **e** Department **f**

Rating Value * Rating Text ? * Rating Value * Rating Text ? *

1	poor	2	average
3	good	4	very good
5	Excellent		

g

h UPDATE Cancel

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

a

Home > Appraisals > Initialize Appraisal

b

c + Add

Initialize Appraisal

Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
	Asiaglobal	asdf	2019-2019	Quarterly	Q1	Open	In progress
	Middle East	Assembling	2016-2017	Quarterly	Q1	Open	In progress
	Asiaglobal	Human Resource	2017-2018	Quarterly	Q2	Open	Enabled to Employees
	No Business Unit	tes	2016-2017	Quarterly	Q1	Open	In progress
	Asiaglobal	QualityAssurance	2016-2017	Quarterly	Q1	Open	Enabled to Employees

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

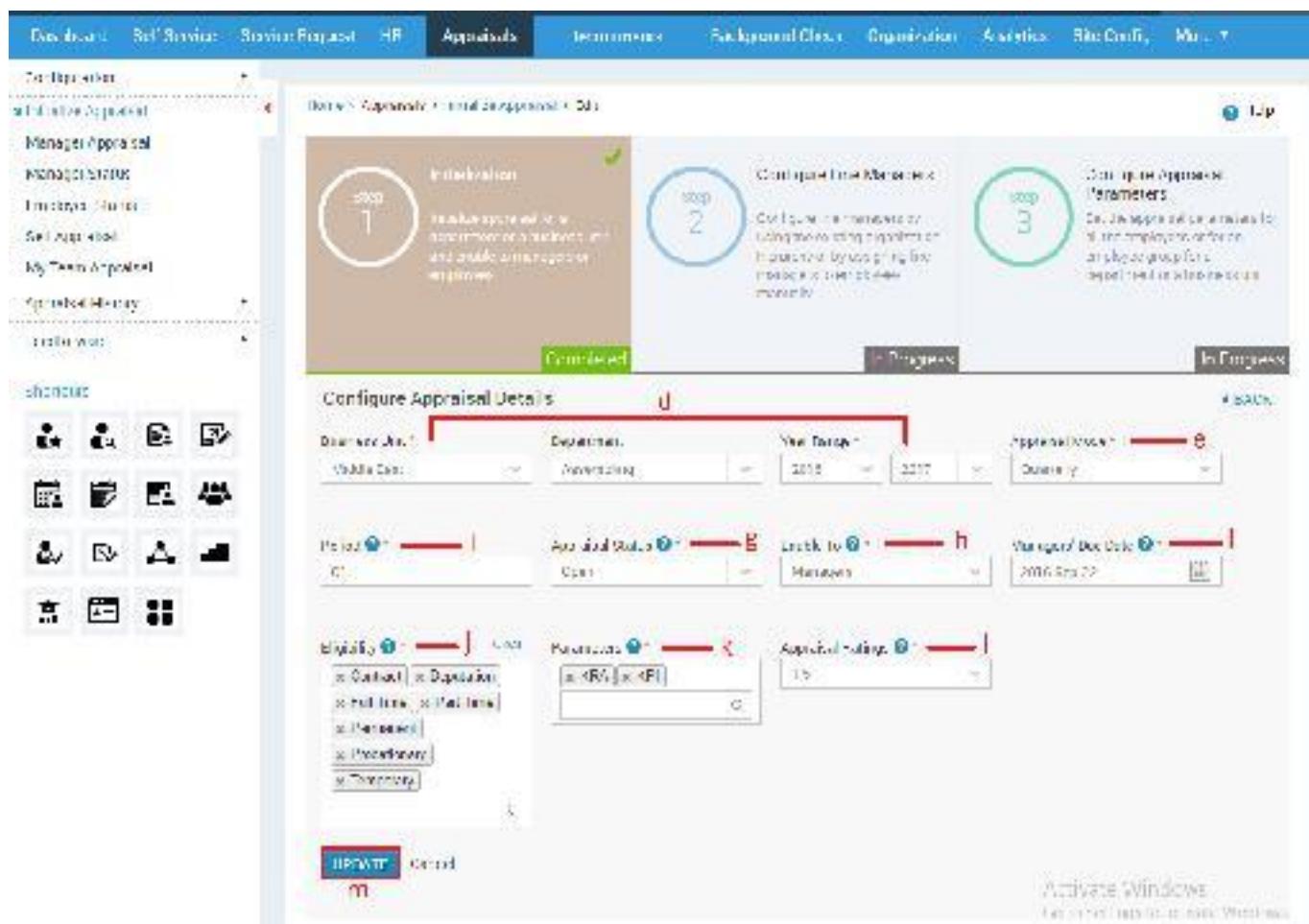


Figure 212

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

 Ratings not added for the appraisal. [Click here](#) to configure ratings.

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

- ✓ Establish appraisal process as per the organization hierarchy where line manager will be same as the reporting manager
- ✓ 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

Choose by Organization Hierarchy

a



Confirmation

You choose to configure line managers by Organization Hierarchy. Please confirm.

b

Yes

No

Figure 214

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

A small confirmation window will appear.

- b. Click **Yes** button

Please refer Figure 215

The screenshot shows the 'Initialize Appraisal' process with three steps:

- Step 1 Initialization:** Completed. Description: Initialize appraisal for a department or a business unit and enable to managers or employees.
- Step 2 Configure Line Managers:** In Progress. Description: Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually.
- Step 3 Configure Appraisal Parameters:** In Progress. Description: Set the appraisal parameters for all the employees or for an employee group for a department or a business unit.

Below the steps, it shows the Business Unit: General Administration, Department: Hardware, and the Quarterly Appraisal (Q1), 2016.

Configure Line Managers by Organization Hierarchy

Two L1 Managers are listed:

- Raj Davuluri (SE0006, Admin Head) assigned to 1 Employee(s).
- George Rimes (SE0011, Manager) assigned to 1 Employee(s).

A red box highlights the first L1 Manager entry, and a red letter 'C' is placed below it. A red box also highlights the 'd' icon next to the second L1 Manager entry, and a red letter 'd' is placed next to it.

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

The screenshot shows the Oracle HCM Oracle Appraisal - Initialize Appraisal wizard. The process is divided into three steps:

- Step 1 Initialization:** Initiative appraised for a department or a business unit and enable to managers or employees.
- Step 2 Configure Line Managers:** Configure the managers by using the existing organization hierarchy or by assigning line managers to employees manually.
- Step 3 Configure Appraisal Parameters:** Set the appraisal parameters for all the employees or for an employee group for a department or a business unit.

The current step, Step 2, is labeled "In Progress". Below the steps, the Business Unit is set to General Administration and the Department is set to Hardware. The Quarterly Appraisal (Q1), 2016 is selected. The page title is "Configure Line Managers by Organization Hierarchy".

On the left, under "Employees under L1 Manager", a list of employees is shown, with one entry highlighted and enclosed in a red box, labeled "e".

In the center, there are configuration sections:

- "Configure Line Managers" with a dropdown for "Select Appraisal Levels" set to "2".
- "L1 Manager" dropdown set to "Clarissa Franco, IT Director".

Both of these sections have a red arrow pointing to them, labeled "f" and "g" respectively.

At the bottom right, there are "SAVE" and "CANCEL" buttons, with the "SAVE" button also enclosed in a red box and labeled "h".

Figure 216

- The Employees reporting to the Manager will be displayed here
- Select the number of appraisal levels you want (We have selected '2' in this example). You can have a maximum of 5 appraisal levels.
- Select your L1/L2... Manager(s)
- 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

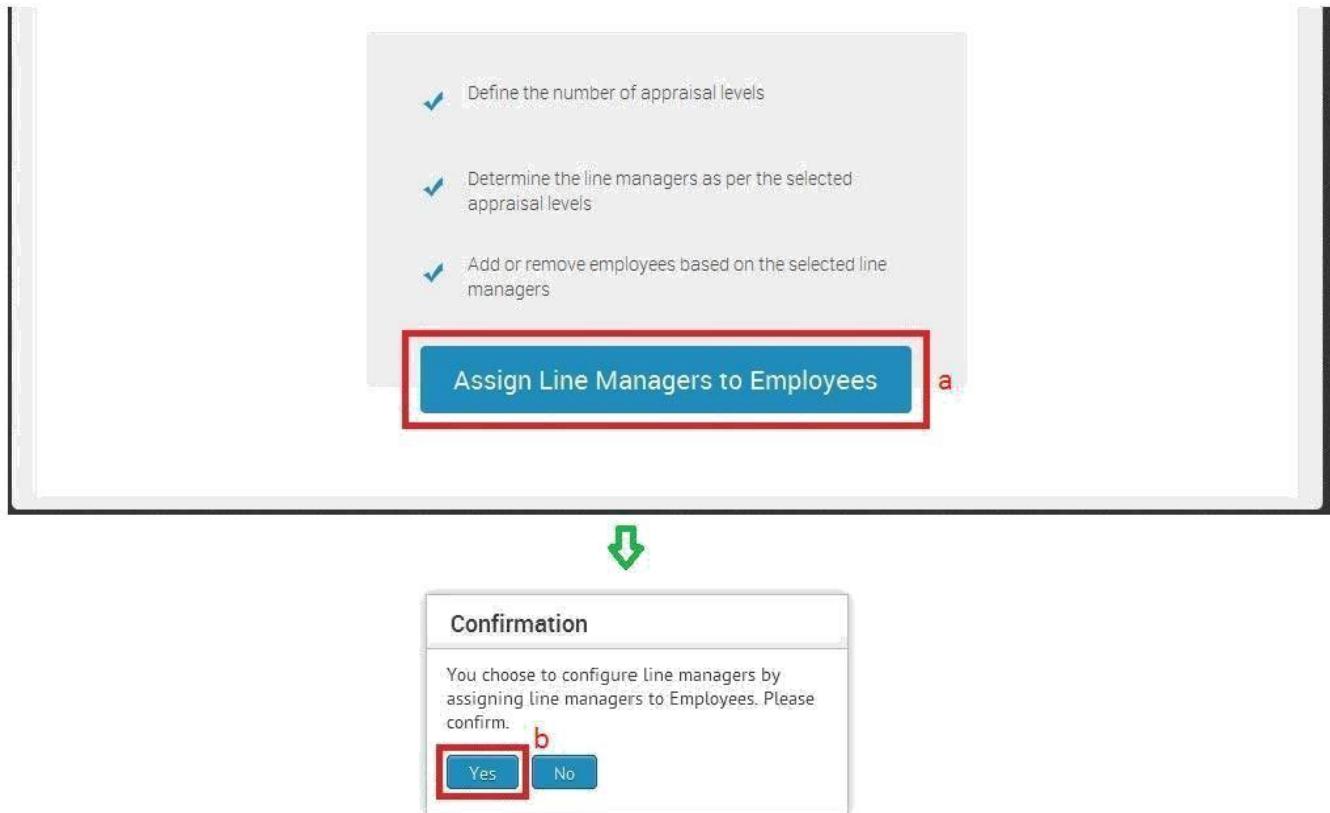


Figure 217

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

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 218

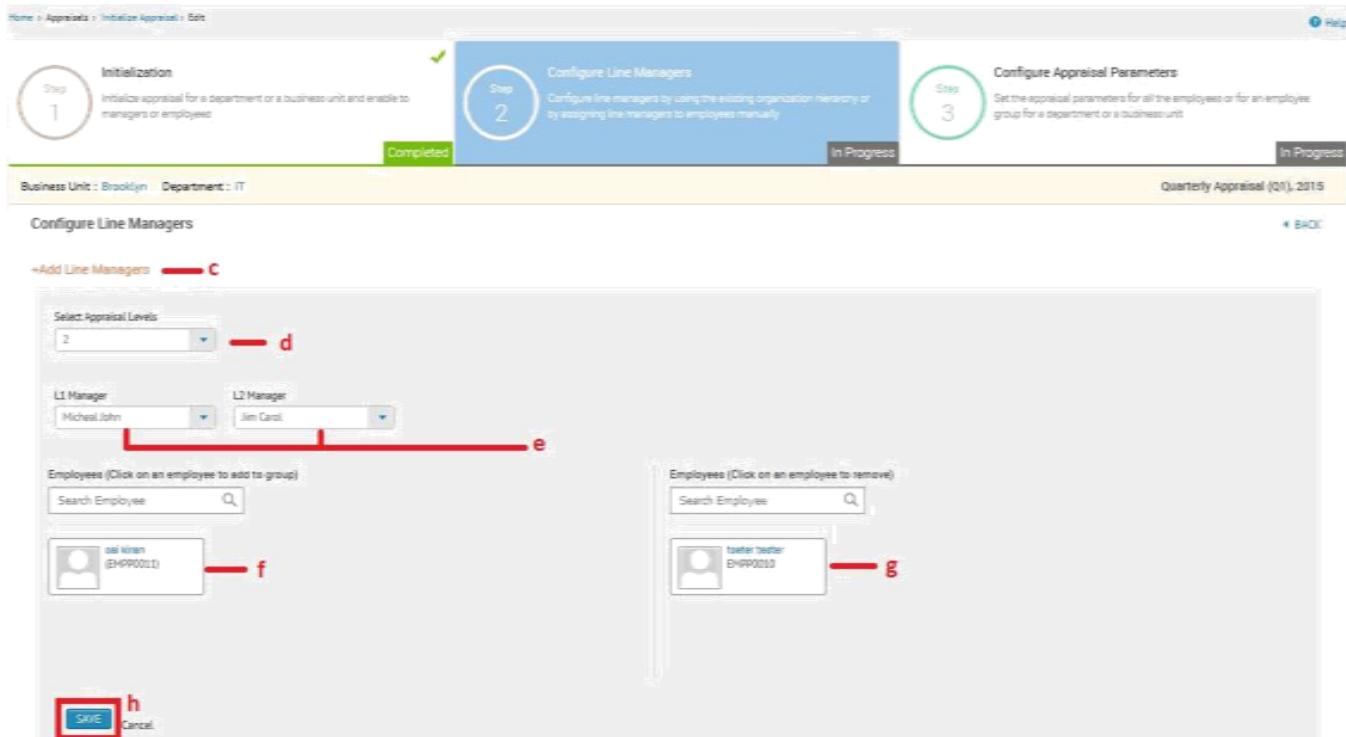


Figure 218

- 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

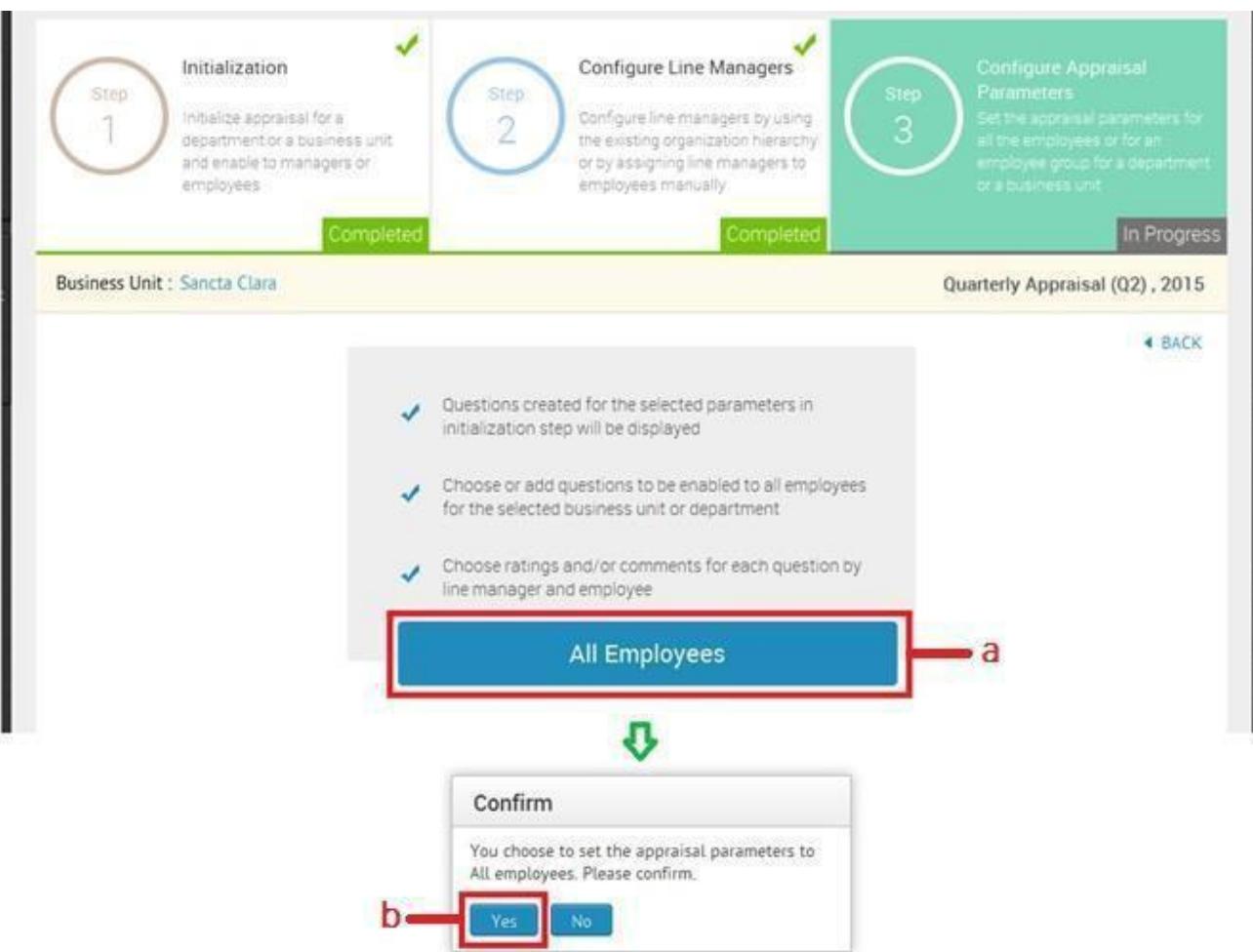


Figure 219

a. Click **All Employees**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 220

Home > Appraisals > Initialize Appraisal > Edit

Help

Step 1 Initialization Initialize appraisal for a department or a business unit and enable to managers or employees Completed

Step 2 Configure Line Managers Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually Completed

Step 3 Configure Appraisal Parameters Set the appraisal parameters for all the employees or for an employee group for a department or a business unit In Progress

Business Unit : Brooklyn Department : IT Quarterly Appraisal (Q1), 2015

Configure Questions For All Employees BACK

All | Selected

Check All d

c

h

Questions

Verification

Explain about new technologies that you have learned?
How you achieve your goals?

Manager Comments Manager Ratings
 Employee Comments Employee Ratings f

Manager Comments Manager Ratings
 Employee Comments Employee Ratings e

Manager Comments Manager Ratings
 Employee Comments Employee Ratings

+ Add New Question g

SAVE & INITIALIZE SAVE & INITIALIZE LATER DISCARD

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

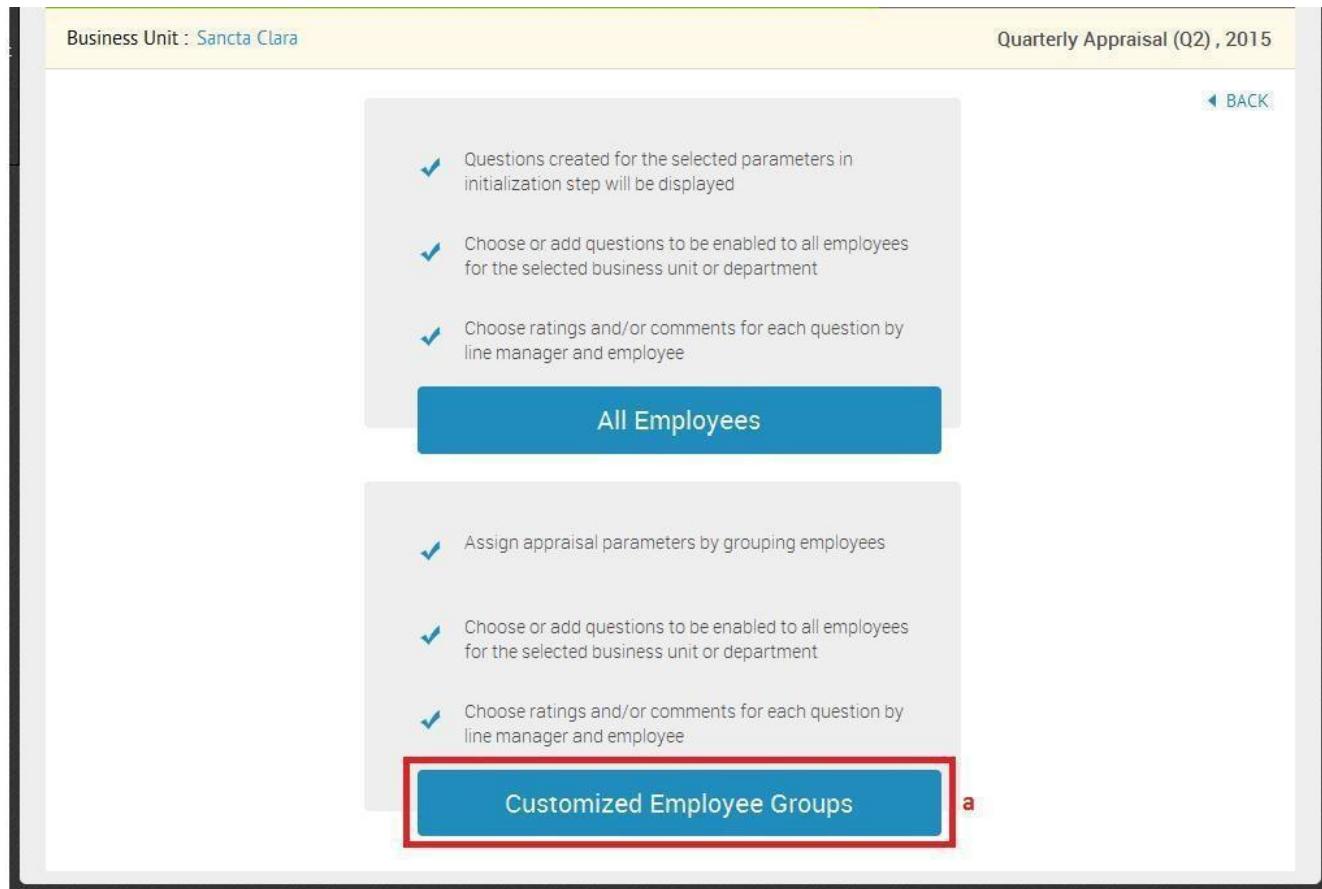


Figure 222

a. Click **Customized Employee Groups**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 223

The screenshot shows the 'Customized Employee Groups' page. At the top, it displays 'Business Unit : Cyber Towers' and 'Department : Development' with a date 'Quarterly Appraisal (Q1), 2015'. Below this, there are two buttons: 'CREATE NEW GROUP' (highlighted with a red box) and 'DISCARD'. A back arrow and the text 'BACK' are also present.

The main area is titled 'Customized Employee Groups'. It includes a 'Group Name *' field (labeled 'd') and a 'Employees' section with a search bar and a list of employees (labeled 'e'). To the right, there's a 'Selected Employees (0)' section with its own search bar and a button to 'Add employees to group'.

A large grid below lists questions for appraisal. The columns are 'Questions' (labeled 'g'), 'Projects/ Work areas' (labeled 'f'), 'Personality', and 'Skills'. Each question has checkboxes for 'Manager Comments' and 'Employee Comments' (labeled 'h') and checkboxes for 'Manager Ratings' and 'Employee Ratings' (labeled 'i').

At the bottom right, there are 'SAVE' and 'Close' buttons (labeled 'k').

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

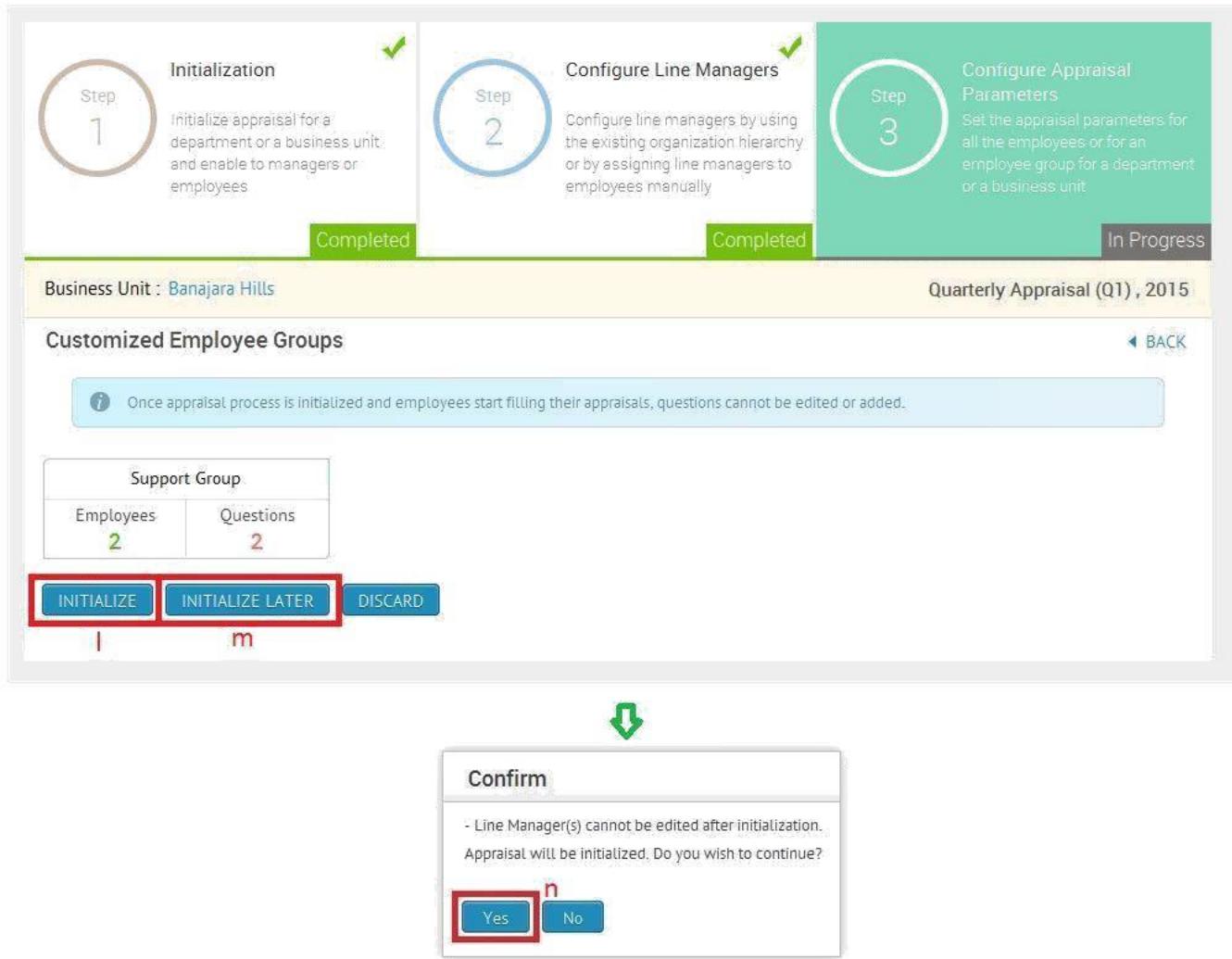


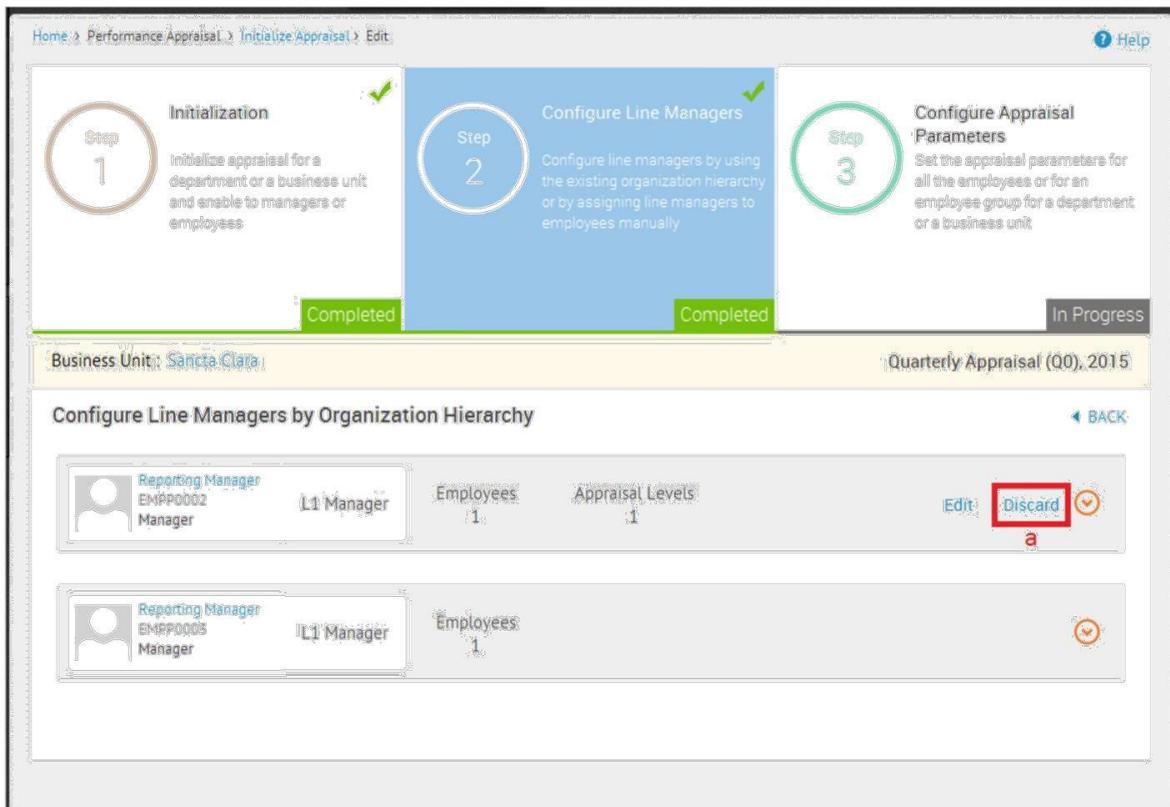
Figure 224

- 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



OR

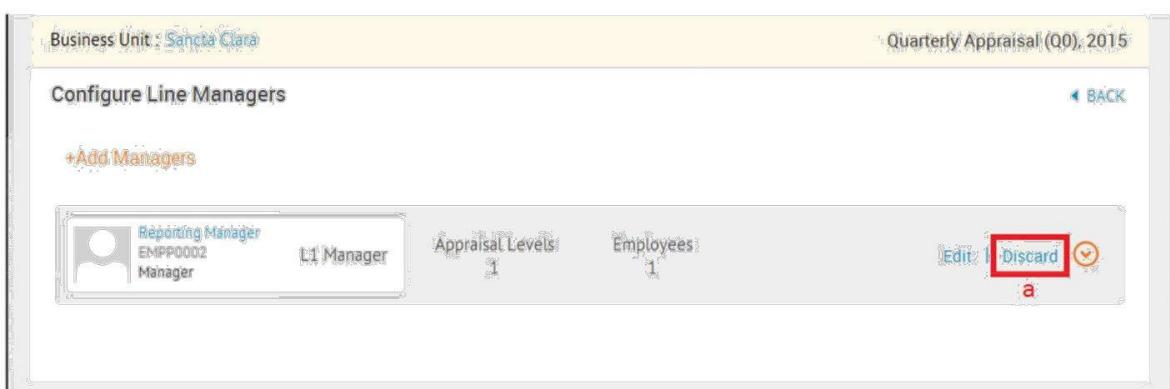


Figure 224

- 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

b

Manager Appraisal

Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Sta
d	Global Systems India	Development	2017-2018	Quarterly	Q1	Open	Enabled to I
	Global Systems India	Quality	2018-2019	Yearly	Yearly	Force Closed	Enabled to I
	Global Systems India	Development	2016-2017	Yearly	Yearly	Closed	Enabled to I
	Global Systems India	Human Resource	2015-2016	Yearly	Yearly	Closed	Enabled to I
	Global Systems India	Quality	2017-2018	Yearly	Yearly	Closed	Enabled to I
	Orange Blossom	Information Technology	2015-2015	Quarterly	Q1	Open	Enabled to I
	Global Systems India	Quality	2016-2017	Yearly	Yearly	Closed	Enabled to I
	Global Systems India	Quality	2015-2016	Yearly	Yearly	Closed	Enabled to I

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

Initialization Details

Business Unit	Jubilee Hills	Department	--
Appraisal Mode	Half yearly	From Year	2014
To Year	2015	Period	H1
Status	Open	Eligibility	Full Time, Permanent, Probationary
Enable To	Managers	Parameters	Generic
Managers Due Date	05/27/15	Process Status	Enabled to Managers
Appraisal Ratings	1-5		

Group Details

[CREATE NEW GROUP](#)
[SUBMIT INITIALIZATION](#)

Group Name *

e

Employees

[

Selected Employees (0)

]

Employee 1
(EMPP0029)
Software Engineer

f

Employee 8
(EMPP0029)
Software Engineer

Configure Appraisal Parameters for All Employees

All | Selected
+ Add New Question
g

Questions	Actions
<input checked="" type="checkbox"/> Check All i	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="flex: 1;"> <input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings </div> k </div>
<input checked="" type="checkbox"/> h New Technologies/skills learn and implemented What are the new technologies/skills you explored and implemented?	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="flex: 1;"> <input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings </div> j </div>
<input checked="" type="checkbox"/> Responsibility Have you taken complete ownership of the task/project/product assigned to you?	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="flex: 1;"> <input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings </div> </div>

SAVE
| Close
l

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

Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
	GlobalSolutions	SoftSolutions	2015-2015	Quarterly	Q1	Open	In progress
	Orange Blossom	InformationTechnology	2015-2015	Quarterly	Q1	Open	Enabled to Mana

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

Initialization

Step 1

Completed

Configure Line Managers

Step 2

Completed

Configure Appraisal Parameters

Step 3

Completed

Appraisal Details

Business Unit	Business Unit 1	Department	...
Appraisal Mode	Half yearly	From Year	2014
To Year	2015	Period	H2
Eligibility	Full Time, Permanent, Probationary	Parameters	Generic, KRA, KPI
Status	Open	Process Status	Enabled to Managers
Appraisal Status	Open	Managers Due Date	05/20/15
Enable To	Enable To Employees	Employee Due Date	05/29/15
Appraisal Ratings	1-5		

Buttons:

- UPDATE (highlighted with a red box)
- Cancel

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

The screenshot shows a software interface for managing appraisals. At the top, there is a navigation bar with links: Dashboard, Self Service, Service Request, HR, Appraisals (which is highlighted with a red box and labeled 'a'), Recruitments, Background Check, Organization, Analytics, Site Config, and More. Below the navigation bar is a left-hand sidebar with the following menu items: Configuration, Initialize Appraisal, Manager Appraisal, Manager Status (which is highlighted with a red box and labeled 'b'), Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, Feedforward, and Shortcuts. The main content area displays the 'Manager Status' page. It includes a breadcrumb trail: Home > Performance Appraisal > Manager Status. There are dropdown menus for Business Unit (set to Orange Blossom, labeled 'c') and Department (set to InformationTechnology, labeled 'd'). A 'Manager Appraisal Status' dropdown is shown with 'Not Completed' selected (labeled 'e'). A help link is located in the top right corner. The text 'Quarterly Appraisal (Q1), 2015' is displayed. In the center, there is a card for 'Jadagish MM' showing the status 'Not Completed' (labeled 'f').

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

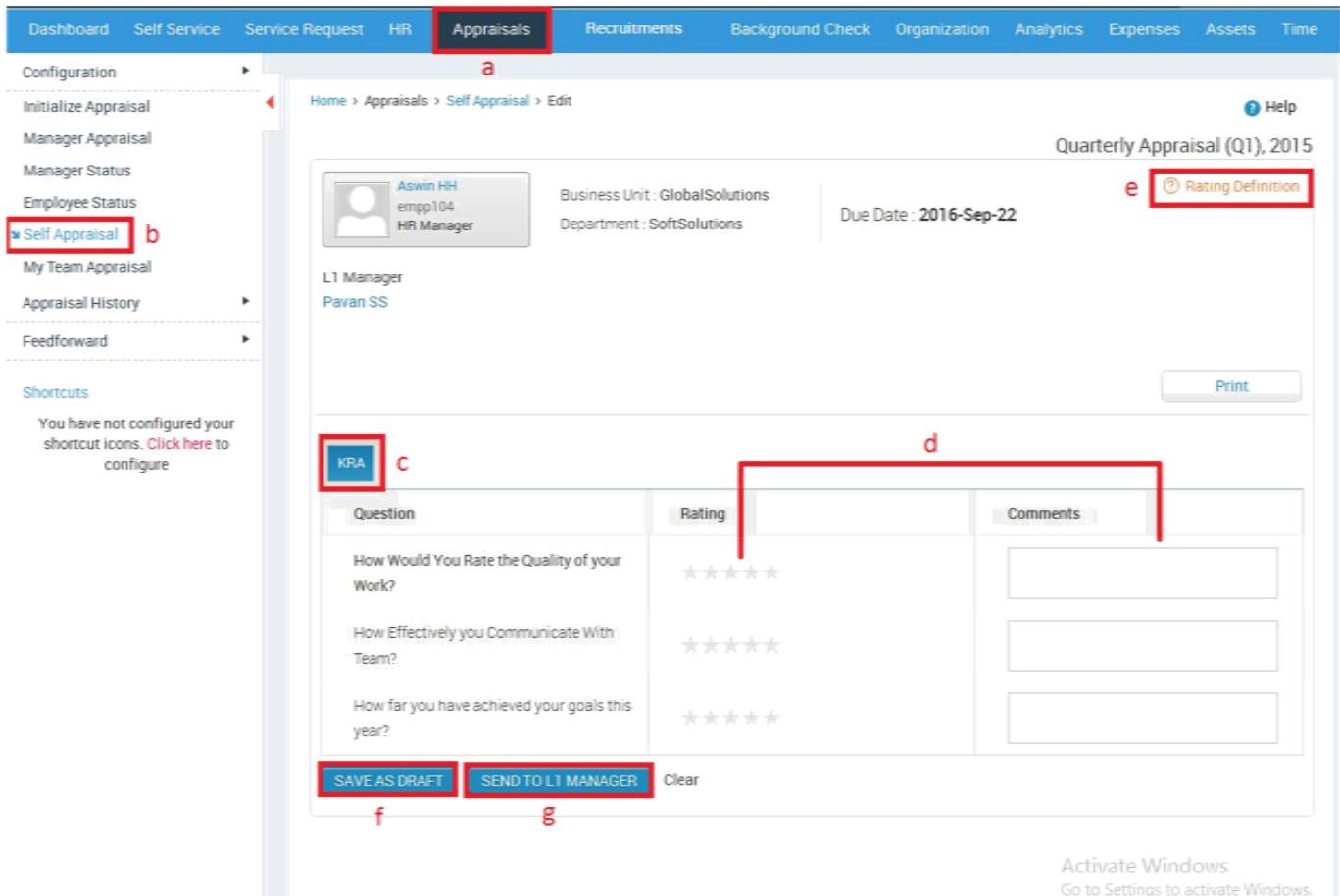


Figure 231

- 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

The screenshot shows the Oracle HCM interface with the following details:

- Top Navigation Bar:** Dashboard, Self-Service, Service Request, HR, **Appraisals**, Recruitments, Organization, Expenses, Time.
- Left Side Menu:** Configuration, Manage Appraisal, SH Approvals, **My Team Appraisal** (highlighted with a red box), Appraisal History, Email Alert, Announcements.
- Central Content Area:** Header: Name - Appraisal - My Team Appraisal. Sub-Header: Search Employee, Select Appraisal Type. Main Content: A list of employees with their names, employee numbers, and job titles. One employee, Arun, has a red box around the "Employee Rating" field. Another employee, Manoj, has a red box around the "Comments" field. A third employee, Suresh, has a red box around the "Expand" button.
- Bottom Buttons:** SUBMIT, SAVE AS DRAFT (highlighted with a red box), CANCEL.
- Footer:** Footer links: Activate Mydrive, Go to Settings to activate Mydrive.

Figure 232

- Click **Appraisals** in the top menu
- Click **My Team Appraisal** on the left menu panel
- All the Employees in the Manager's team will be displayed
- The status of each Employee's appraisal is displayed
- Click **Expand** option to provide Manager's rating
- Provide overall rating and comment for an Employee
- Provide the rating and comments for each question
- Click **SUBMIT** button
- 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

Configuration
Initialize Appraisal
Manager Appraisal
Manager Status
Employee Status **b**
Self Appraisal
My Team Appraisal
Appraisal History
Feedforward
Shortcuts
You have not configured your shortcut icons. [Click here](#) to configure

Home > Performance Appraisal > Employee Status

Business Unit: **c** GlobalSolutions Department: **d** SoftSolutions Appraisal Status: **e** Select Appraisal Status

Quarterly Appraisal (Q2), 2015

Anish JJ Pending employee ratings	Arun JJ Pending L1 ratings	Manish HUL Pending employee ratings
Tanish FF Pending employee ratings	Tharun FF Pending employee ratings	Varun HUL Pending employee ratings

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

The screenshot shows the 'Appraisals' module interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals' (which is highlighted with a red box), 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar has a 'Configuration' section with 'Initialize Appraisal', 'Manager Appraisal', 'Manager Status', 'Employee Status', 'Self Appraisal', 'My Team Appraisal', 'Appraisal History' (with 'Feedforward' and 'Questions' under it, both highlighted with red boxes), 'Initialize Feedforward', 'Appraise Your Manager', 'Manager Feedforward', and 'Employee Status'. Below this is a 'Shortcuts' section with three icons. The main content area shows a 'Questions' list with two entries:

Action	Question	Description
Eye icon	Appraise your manager	Appraise your manager
Eye icon	Rate your manager when he is handling cl..	Rate your manager when he is handling cl..

At the bottom right of the content area, there is a 'Records per page' dropdown set to 20, and a red box highlights the '+Add' button in the top right corner of the list table.

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

The screenshot shows the 'Add Question' form within the 'Appraisals' module. The left sidebar is identical to Figure 234. The main form has a header 'Home > Appraisals > Feedforward > Questions > Add'. It contains three question fields, each with a 'Question' input field (highlighted with a red box 'f') and a 'Description' text area (with a character limit of 200). A red bracket 'e' points to the 'Description' area of the second question. At the bottom of the form are 'SAVE' and 'Cancel' buttons, with a red box 'g' highlighting the 'SAVE' button.

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

Action	Business Unit	Department	Financial Year	Mode	Period	Due Date	Appraisal Status	Process Status
GlobalSolutions	SoftSolutions	2015-2015	Quarterly	Q1	2016-Sep-28	Open	Appraisal Employees	

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

Configuration

Initialize Appraisal

Manager Appraisal

Manager Status

Employee Status

Self Appraisal

My Team Appraisal

Appraisal History

Feedforward

Questions

Initialize Feedforward

Appraise Your Manager

Manager Feedforward

Employee Status

Shortcuts

You have not configured your shortcut icons. [Click here](#) to configure

Home > Appraisals > Feedforward > Initialize Feedforward > Add

Appraisal ? * e Appraisal Status * f Employee Details g Enable To * h

Select Appraisal Open Show Hide

Due Date ? * i

Configure Questions

All | Selected j + Add New Question

	Questions	Comments n	Ratings
<input checked="" type="checkbox"/> k	Appraise your manager Appraise your manager	<input checked="" type="checkbox"/> Comments m	<input checked="" type="checkbox"/> Ratings
<input checked="" type="checkbox"/>	Rate your manager when he is handling client meetings Rate your manager when he is handling client meetings	<input checked="" type="checkbox"/> Comments	<input checked="" type="checkbox"/> Ratings

SAVE & INITIALIZE o SAVE & INITIALIZE LATER p Cancel

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

The screenshot shows the SAP Fiori interface for the Appraisals module. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is highlighted in red), Recruitments, Organization, Expenses, and Time. On the left, a vertical menu has 'Feedforward' selected (marked 'b') and 'Appraise Your Manager' (marked 'c'). The main content area displays a feedforward for 'William Wallace' (emp003, Manager) from the 'Global Systems India' business unit, 'Development' department, due on '09/29/16'. The feedforward consists of three questions with five-star ratings and comment boxes. Below the table is a section for 'Additional Comments' with a text input field (marked 'e'). At the bottom are 'SAVE AS DRAFT' (marked 'f') and 'SUBMIT' (marked 'g') buttons.

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

The screenshot shows the 'Appraisals' module interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (highlighted in red), Recruitments, Background Check, Organization, Analytics, Site Config, and More. A left-hand sidebar lists various menu items, with 'Feedforward' highlighted in red and selected. The main content area displays 'Feedforward Details' for the '2015-2016 Quarterly(Q1)' period. It shows a table with four columns: Business Unit (Global Systems India), Department (Development), Mode (Quarterly), From Year (2015), To Year (2016), Period (Q1). Below this, the 'Manager Ratings' section shows two entries. The first entry for 'Anderson Neo' has a green circular rating of '4'. The second entry for 'William Wallace' has a yellow circular rating of '3'. Both entries include details like L1 Manager, Department, and Business Unit.

a

b

c

d

e

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

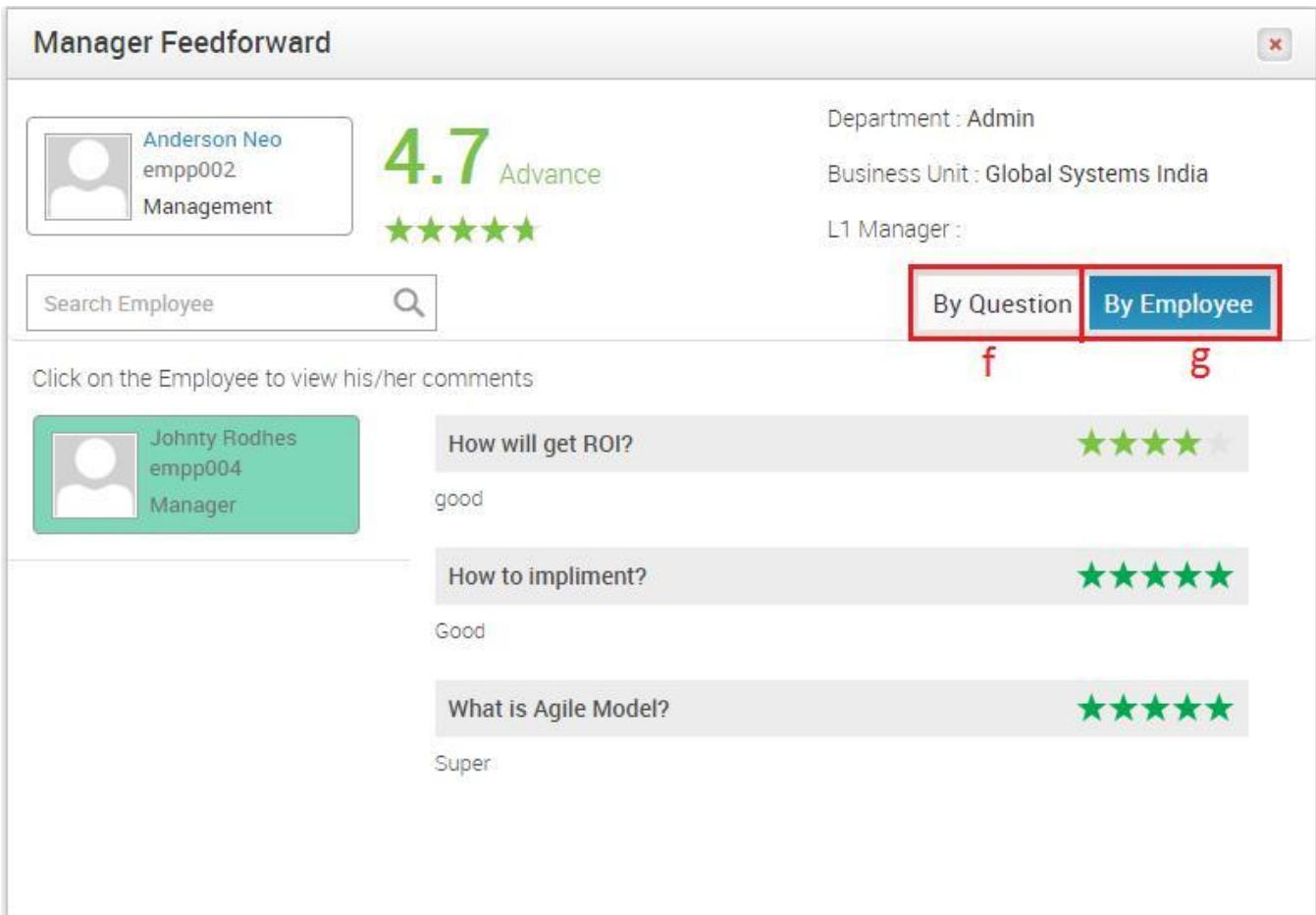


Figure 240

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

The screenshot shows the 'Appraisals' module interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals' (which is highlighted in red), 'Recruitments', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar has sections for 'Configuration', 'Initialize Appraisal', 'Manager Appraisal', 'Manager Status', 'Employee Status', 'Self Appraisal', 'My Team Appraisal', 'Appraisal History', 'Feedforward' (highlighted with a red box and labeled 'b'), 'Questions', 'Initialize Feedforward', 'Appraise Your Manager', 'Manager Feedforward', and 'Employee Status' (highlighted with a red box and labeled 'c'). The main content area shows a breadcrumb path 'Home > Feedforward > Employee Status'. It displays a process titled '2015-2016 Quarterly(Q2) ...' with a dropdown for 'Select Feedforward Status'. Below this, it lists three employees: William Wallace (Pending employee ratings), Ram Raj (Pending employee ratings), and Tommy Hilfiger (Completed). A red bracket labeled 'e' points to the 'Completed' status of Tommy Hilfiger.

Figure 241

- Click **Appraisals** in the top menu
- Click **Feedforward** on the left menu panel
- Click **Employee Status** in the submenu
- Select a process to view Feedforward details in the dropdown
- 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

The screenshot shows the 'Appraisals' module interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals' (which is highlighted in red), 'Recruitments', 'Organization', 'Expenses', and 'Time'. The left sidebar shows 'Manager Appraisal', 'Self Appraisal', 'My Team Appraisal', 'Appraisal History' (highlighted with a red box and labeled 'b'), 'My Appraisal History' (highlighted with a red box and labeled 'c'), 'Team Appraisal History', and 'Feedforward'. The main content area shows a breadcrumb path 'Home > Appraisals > Appraisal History > My Appraisal History'. It displays a table titled 'My Appraisal History' with one row. The columns are 'Action' (with an edit icon), 'Business Unit' (Global Systems), 'Department' (IT), 'Financial Year' (2016-2017), 'Appraisal Mode' (Yearly), and 'Period' (Yearly). At the bottom, there are buttons for 'New' and 'Search', and a dropdown for 'Records per page' set to 20.

Figure 242

- Click **Appraisals** in the top menu
- Click **Appraisal History** on the left menu panel
- Click **My Appraisal History** in the submenu

d. Click **View** icon

Please refer Figure 243

The screenshot shows the SAP Fiori interface for the Appraisals module. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is highlighted in red), Recruitments, Organization, Expenses, and Time. On the left, a sidebar menu has 'Appraisal History' expanded, with 'My Appraisal History' selected and highlighted in red. Other options in the sidebar include Manager Appraisal, Self Appraisal, My Team Appraisal, Appraisal History, Team Appraisal History, Feedforward, and Shortcuts. The main content area displays Jim Kerr's appraisal details: Business Unit: Global Systems, Department: IT, Due Date: 09/19/16, and Appraisal Status: Completed. It also shows L1 Manager (Anderson Neo) and L2 Manager (Richard Son) with their respective Appraisal Ratings (both 2). A summary table compares KRA and ROI across two questions: 'What is Validation? Validation' and 'What is Walkthrough? Walkthrough'. The table shows Employee Ratings (4 Advance, 4 Advance) and Manager Ratings (2 Average, 2 Average). A red box labeled 'e' highlights the 'Print' button.

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

The screenshot shows the SAP Fiori interface for the Appraisals module. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (highlighted in red), Recruitments, Organization, Expenses, and Time. On the left, a sidebar menu has 'Appraisal History' expanded, with 'Team Appraisal History' selected and highlighted in red. Other options in the sidebar include Configuration, Manager Appraisal, Self Appraisal, My Team Appraisal, Appraisal History (labeled 'b'), My Appraisal History, Team Appraisal History (labeled 'c'), and Feedforward. The main content area displays the 'Team Appraisal History' screen with columns for Action, Business Unit, Department, Financial Year, Appraisal Mode, and Period. It shows a single record for Global Systems, IT, 2015-2016, Yearly, and Yearly. A red box labeled 'd' highlights the eye icon in the Action column. A red box labeled 'c' highlights the search icon in the toolbar. The toolbar also includes a 'Pin to shortcuts' button and a 'Help' button.

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

The screenshot shows the Oracle HCM application interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (which is currently selected), Recruitments, Organization, Expenses, and Time. On the left, a sidebar provides quick access to Manager Appraisal, Self Appraisal, My Team Appraisal, Appraisal History (with a dropdown for 'My Appraisal History' and 'Team Appraisal History'), Feedforward, and Shortcuts (with a note about unconfigured icons). The main content area displays a breadcrumb path: Home > Appraisals > Appraisal History > Team Appraisal History > View. It features a search bar and two employee profiles. The first employee, Tommy Hilfiger (emp009), is listed as an Employee with an 'Appraisal Status' of 'Pending L1 ratings'. The second employee, William Wallace (emp007), is also listed as an Employee with the same appraisal status. Each profile has an 'Expand' button to the right, which is highlighted with a red box labeled 'e'.

Figure 245

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

Please refer Figure 246

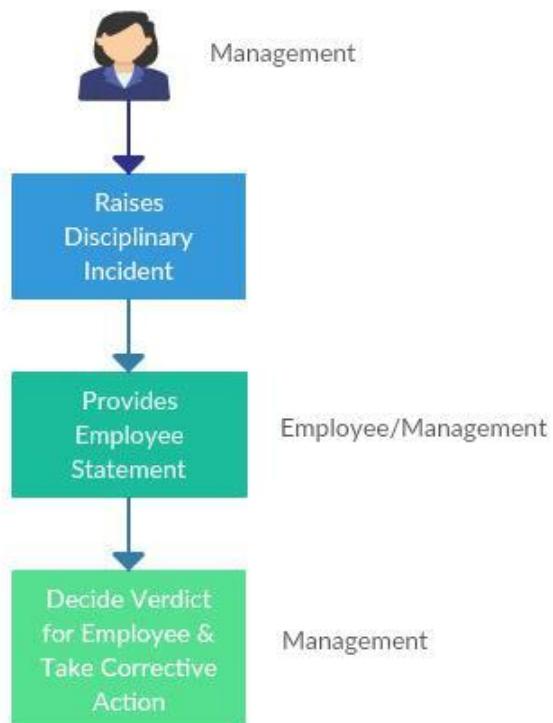
This screenshot shows the expanded view for the second employee, William Wallace (emp007), from Figure 245. The interface remains largely the same, with the navigation bar, sidebar, and breadcrumb path. The main content area now displays a detailed appraisal history for William Wallace. At the top of this section, there are tabs for 'KRA', 'ROI', and 'Skill set', with 'KRA' being the active tab. Below these tabs is a table with four columns: 'Question', 'Employee Rating', 'Rating', and 'Comments'. The table contains three rows of data, each corresponding to a question and its rating. The first row is 'What is Validation? Validation' with a rating of '4 Advance Good'. The second row is 'What is Walkthrough? Walkthrough' with a rating of '4 Advance Good'. The third row is 'What is Agile Model? Agile' with a rating of '4 Advance Good'. At the bottom of the expanded view, there is another employee profile for William Wallace with an 'Appraisal Status' of 'Pending L1 ratings' and an 'Expand' button.

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

The screenshot shows a software interface with a top navigation bar containing links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, More, Expenses, and Disciplinary. A red box labeled 'b' highlights the 'Violation Type' link in the left sidebar. Another red box labeled 'a' highlights the 'Disciplinary' link in the top right corner. The main content area is titled 'Violation Type' and displays a single record in a grid:

Action	Violation Type	Description
	Alcohol Abuse	Alcohol abuse is a previous psychiatric...

Below the grid are 'Records per page' dropdown and search/filter icons.

Figure 247

- Click **Disciplinary** in the top menu
- Click **Violation Type** on the left menu panel

Please refer Figure 248

This screenshot is identical to Figure 247, but it includes a red box labeled 'c' highlighting the '+Add' button located at the top right of the grid header.

Figure 248

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

Please refer Figure 249

The screenshot shows a 'Violation Type' add form. It has two input fields: 'Violation Type *' and 'Description'. Below the fields are 'SAVE' and 'Cancel' buttons. A red bracket labeled 'd' covers the 'Description' field and its placeholder text '500 characters remaining (200 minimum)'. A red box labeled 'e' highlights the 'SAVE' button.

Figure 249

- Enter 'Violation Type' name and its description
- Click **SAVE** button

17.2 How do I raise a disciplinary incident?

Please refer Figure 250

The screenshot shows the Disciplinary module interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A dropdown menu for 'Violations Type' is open, with 'Raise An Incident' selected. The main content area displays a grid titled 'Raise An Incident' with columns: Action, Employee Name, Business Unit, Department, Violation Name, Date Of Occurrence,Appealed, and Verdict. One row is visible for 'jessica jes'. The bottom of the grid has buttons for 'C' (Create) and 'P' (Print). The status bar at the bottom right shows 'Records per page: 20'.

Figure 250

- Click **Disciplinary** in the top menu
- Click **Raise an Incident** on the left menu panel

Please refer Figure 251

This screenshot is similar to Figure 250, showing the Disciplinary module with the 'Raise An Incident' grid. However, a new button labeled '+ Raise an incident' is highlighted with a red box and letter 'c' in the top right corner of the grid header.

Figure 251

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

Please refer Figure 252

This screenshot shows the 'Add' form for raising a disciplinary incident. The form fields include: 'Incident Raised By' (d), 'Business Unit' (dropdown), 'Department' (dropdown), 'Employee Name' (dropdown), 'Employee Id' (text), 'Job Title' (text), 'Reporting Manager' (text), 'Date of Occurrence' (date picker), 'Expiry Date' (date picker), 'Type of Violation' (dropdown), 'Violation Description' (text), 'Employee Appeal' (radio buttons Yes/No, g), 'Employee Statement' (text), 'Verdict' (radio buttons Guilty/Not Guilty, f), and 'Corrective Action' (dropdown). At the bottom are 'SAVE' and 'Cancel' buttons, with 'SAVE' highlighted with a red box and letter 'h'. A red bracket 'e' points to the right side of the form, covering the 'Employee Appeal' section and beyond.

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

The screenshot shows a software interface with a top navigation bar containing links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A dropdown menu for 'Disciplinary' is open, with 'Disciplinary' also highlighted in red. The main content area is titled 'My Incidents' and displays a table with columns: Action, Business Unit, Department, Violation Name, Date Of Occure, Verdict, and a Records per page dropdown set to 20. The first row of the table shows: Action (with a 'View' icon highlighted in red), Business Unit (Orange Blossom), Department (Information Technology), Violation Name (Alcohol Abuse), Date Of Occure (11/04/2016), Verdict (Yes), and Guilty. There are also 'Print' and 'Logs' buttons in the header of the table.

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

The screenshot shows a software interface with a top navigation bar containing links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A dropdown menu for 'Disciplinary' is open, with 'My Incidents' also highlighted in red. The main content area is titled 'View' and displays a table with columns: Incident Raised By, Super Admin; Type Of Violation, Alcohol Abuse; Business unit, Orange Blossom; Department, Information Technology; Employee Id, EMPP201; Employee Name, Kimbley Kim; Job Title, --; Reporting Manager Name, Andrews Lee; Violation Description, Very Frequent; Date Of Occurrence, 11/04/2016; Expiry Date, 11/30/2016; Employee Appeal, Yes; Employee Statement, I am feeling guilty; Management Verdict, Guilty; and Corrective Action, Suspension With Pay. Below this table is a 'DISCIPLINE INCIDENT HISTORY' section listing several entries from Super Admin, with dates ranging from 11/04/2016 05:12 PM to 11/04/2016 11:47 AM. At the bottom of the history section is an entry for Danny DO.

Figure 254

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

Please refer Figure 255

The screenshot shows a software interface for managing disciplinary incidents. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. A sub-navigation menu on the left lists Violation Type, Raise An Incident, My Incidents (which is selected and highlighted with a red box), Team Incidents, All Incidents, and Shortcuts. The main content area is titled "Team Incidents" and displays a table with columns: Action, Employee Name, Business Unit, Department, Violation Name, Date, and Status. One row is visible, showing an action icon, the employee name "jessica.jones", the business unit "Orange Blossom", the department "Information Technology", the violation name "Alcohol Abuse", the date "11/04/2016", and the status "Open". Below the table are buttons for "Edit", "Delete", "Print", and "View". A small tooltip "Disciplinary" appears over the "View" button.

Figure 255

- Click **Disciplinary** in the top menu
- Click **Team Incidents** on the left menu panel
- Click **View** icon in the Action column

Please refer Figure 256

The screenshot shows a detailed view of a disciplinary incident. The top navigation bar and left sidebar are identical to Figure 255. The main content area shows a table with columns: Incident Raised By, Type Of Violation, Business Unit, Department, Employee Id, Employee Name, Job Title, Reporting Manager Name, Violation Description, Date Of Occurrence, Expiry Date, Employee Appeal, Employee Statement, Management Verdict, and Corrective Action. The table contains one row with the following data:

Incident Raised By: Super Admin	Type Of Violation: Alcohol Abuse	Business Unit: Orange Blossom	Department: Information Technology
Employee Id: EMPP201	Employee Name: Kimbley Kim	Job Title: ---	Reporting Manager Name: Andrews Lee
Violation Description: Very Frequent.	Date Of Occurrence: 11/04/2016	Expiry Date: 11/30/2016	Employee Appeal: Yes
Employee Statement: I am feeling guilty.	Management Verdict: Guilty	Corrective Action: Suspension With Pay	

A large box labeled "DISCIPLINE INCIDENT HISTORY" contains a list of audit logs:

- Disciplinary incident verdict has been provided by Super Admin 11/04/2016 05:12 PM
- Disciplinary incident verdict has been provided by Super Admin 11/04/2016 03:16 PM
- Disciplinary incident verdict has been provided by Super Admin 11/04/2016 03:07 PM
- Disciplinary incident verdict has been provided by Super Admin 11/04/2016 02:15 PM
- Appeal statement has been provided by Danny DO 11/04/2016 11:52 AM
- Disciplinary incident has been raised by Super Admin 11/04/2016 11:47 AM

Figure 256

17.5 How do I provide my appeal statement?

Please refer Figure 257

The screenshot shows a software interface with a blue header bar containing menu items: Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Organization, Expenses, Disciplinary (which is highlighted in red), and Time. On the left, there's a sidebar with 'My Incidents' selected (highlighted in red) and 'Team Incidents'. Below the sidebar are three icons: a document, a grid, and a chart. The main content area is titled 'My Incidents' and displays a table with the following data:

Action	Business Unit	Department	Violation Name	Date Of Occurrence	Appealed	Verdict
	Orange Blossom	Information Technology	Alcohol Abuse	11/01/2016	Yes	Guilty

Below the table are search and filter buttons ('G', 'P') and a dropdown for 'Records per page' set to 20.

Figure 257

- Click **Disciplinary** in the top menu
- Click **My Incidents** on the left menu panel
- Click **edit** icon in the Action column

Please refer Figure 258

The screenshot shows the same software interface as Figure 257, but the main content area is now an 'Edit' screen for a disciplinary incident. The title is 'Home > Disciplinary > My Incidents > Edit'. The left sidebar has 'My Incidents' selected (highlighted in red) and 'Team Incidents'. The main area contains two sections: 'Employee Appeal' and 'Employee Statement'.

Employee Appeal * d
• Yes No

Employee Statement * e
[Empty text area with placeholder '300 characters remaining (300 maximum)']

A table below lists incident details:

Incident Raised By	Kimbley Kim	Type Of Violation	Alcohol Abuse
Business unit	Orange Blossom	Department	Information Technology
Employee Id	EMPP204	Employee Name	Janet tr
Job Title	Software Engineer	Reporting Manager Name	jessica jes
Violation Description	Very frequently	Date Of Occurrence	11/01/2016
Employee Appeal	Yes	Employee Statement	[Empty]
Management Verdict	Guilty	Corrective Action	[Empty]

At the bottom left is a 'SAVE' button (highlighted in red) and a 'Cancel' link. A 'DISCIPLINE INCIDENT HISTORY' section shows a message: 'Disciplinary incident has been raised by Kimbley Kim 11/07/2016 03:08 PM'.

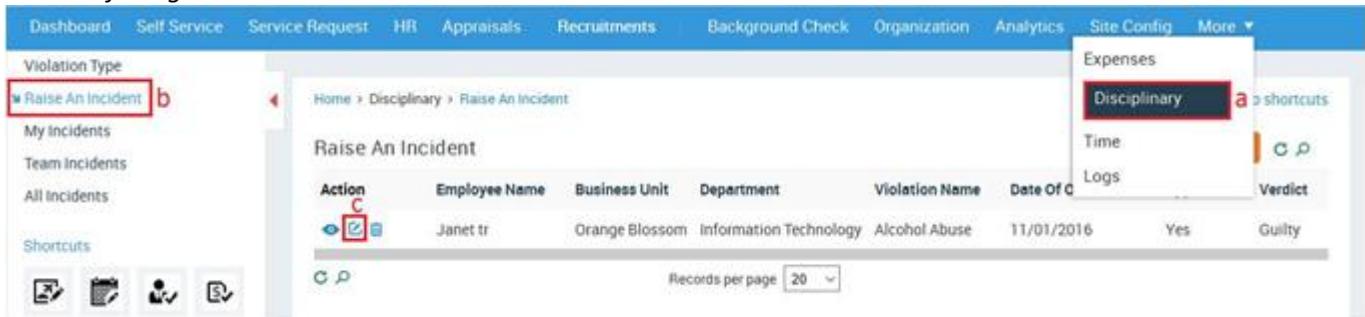
Figure 258

- 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



Action	Employee Name	Business Unit	Department	Violation Name	Date Of C	Verdict	Guilty
	Janet tr	Orange Blossom	Information Technology	Alcohol Abuse	11/01/2016	Yes	Guilty

Figure 259

- 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 260

The screenshot shows a software interface for raising a disciplinary incident. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists Violation Type (Raise An Incident selected), My Incidents, Team Incidents, All Incidents, and Shortcuts. The main content area shows a form with fields: Incident Raised By (Kimbley Kim), Business Unit (Orange Blossom), Department (Information Technology), Employee Name (Janet Tr), Employee Id (EMPP204), Job Title (Software Engineer), Reporting Manager (jessica jes), Date of Occurrence (11/01/2016), Expiry Date (11/08/2016), Type of Violation (Alcohol Abuse), Violation Description (Very frequently), Employee Appeal (Yes selected), Employee Statement (textbox), Verdict (Guilty selected), and Corrective Action (Select Corrective Action dropdown). A red box labeled 'd' highlights the Employee Appeal field. A red box labeled 'e' highlights the Employee Statement field. A red box labeled 'f' highlights the UPDATE button. Below the form is a section titled 'DISCIPLINE INCIDENT HISTORY' showing a log entry: 'Disciplinary incident has been raised by Kimbley Kim' on '11/07/2016 03:08 PM'.

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

The screenshot shows a software interface for managing disciplinary incidents. The top navigation bar is identical to Figure 260. The left sidebar shows 'Raise An Incident' selected. The main content area displays a table of incidents with columns: Action (with an edit icon highlighted with a red box 'c'), Employee Name (Janet tr), Business Unit (Orange Blossom), Department (Information Technology), Violation Name (Alcohol Abuse), Date Of C (11/01/2016), Employee Appeal (Yes), and Verdict (Guilty). A red box labeled 'a' highlights the Disciplinary link in the top menu. A red box labeled 'b' highlights the 'Raise An Incident' link in the sidebar. A red box labeled 'c' highlights the edit icon in the Action column of the table.

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

The screenshot shows a web-based application interface for raising a disciplinary incident. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, and More. On the left, a sidebar lists Violation Type (Raise An Incident selected), My Incidents, Team Incidents, All Incidents, and Shortcuts (with icons for Print, Copy, Email, and View). The main content area shows a form for 'Raise An Incident' under 'Disciplinary'. Fields include: Incident Raised By (Kimbley Kim), Business Unit (Orange Blossom), Department (Information Technology), Employee Name (Janet Tr), Employee Id (EMPP204), Job Title (Software Engineer), Reporting Manager (jessica jes), Date of Occurrence (11/01/2016), Expiry Date (11/00/2016), Type of Violation (Alcohol Abuse), Violation Description (Very frequently), Employee Appeal (Yes selected), Employee Statement (Feeling bad about the incident), Verdict (Guilty selected), and Corrective Action (Select Corrective Action). A red arrow labeled 'f' points to the 'UPDATE' button. Below the form is a 'DISCIPLINE INCIDENT HISTORY' section showing two entries: 'Appeal statement has been provided by Janet tr' (11/07/2016 04:41 PM) and 'Disciplinary incident has been raised by Kimbley Kim' (11/07/2016 03:08 PM).

Figure 262

- d. Select **Yes** if the employee 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

The screenshot shows a web-based application interface for viewing disciplinary incidents. The top navigation bar is identical to Figure 262. The left sidebar shows Violation Type (Raise An Incident selected), My Incidents (selected and highlighted with a red box 'b'), Team Incidents, All Incidents, and Shortcuts. The main content area shows a table titled 'My Incidents' with columns: Action, Business Unit, Department, Violation Name, Date Of Occur, Time, Logs, and Verdict. One row is visible: Action (View icon 'c'), Business Unit (Orange Blossom), Department (Information Technology), Violation Name (Alcohol Abuse), Date Of Occur (11/04/2016), Time (Yes), Logs (Guilty), and Verdict (Guilty). A red box highlights the 'Disciplinary' link in the top right corner of the header.

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

The screenshot shows a software interface for managing incidents. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, More, and a Print button. A red box highlights the Print button. On the left, there's a sidebar with options like Violation Type, Raise An Incident, My Incidents (which is selected), Team Incidents, All Incidents, and Shortcuts. Below the sidebar is a table with incident details:

Incident Raised By	Super Admin	Type Of Violation	Alcohol Abuse
Business unit	Orange Blossom	Department	Information Technology
Employee Id	EMPP201	Employee Name	Kimbley Kim
Job Title	...	Reporting Manager Name	Andrews Lee
Violation Description	Very Frequent.	Date Of Occurrence	11/04/2016
Expiry Date	11/30/2016	Employee Appeal	Yes
Employee Statement	I am feeling guilty.	Management Verdict	Guilty
Corrective Action	Suspension With Pay		

Below the table is a section titled "DISCIPLINE INCIDENT HISTORY" containing a list of events:

- Disciplinary incident verdict has been provided by Super Admin 11/04/2016 05:12 PM
- Disciplinary incident verdict has been provided by Super Admin 11/04/2016 03:16 PM
- Disciplinary incident verdict has been provided by Super Admin 11/04/2016 03:07 PM
- Disciplinary incident verdict has been provided by Super Admin 11/04/2016 02:15 PM
- Appeal statement has been provided by Danny DD 11/04/2016 11:52 AM
- Disciplinary incident has been raised by Super Admin 11/04/2016 11:47 AM

Figure 264

- d. Click Print button

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

Please refer Figure 265

The screenshot shows a software interface for managing incidents. At the top, there's a navigation bar with links like Dashboard, Self Service, Service Request, HR, Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, More, and a Print button. A red box highlights the Print button. On the left, there's a sidebar with options like Violation Type, Raise An Incident, My Incidents, Team Incidents, All Incidents (which is selected), and Shortcuts. Below the sidebar is a table titled "All Incidents" with the following data:

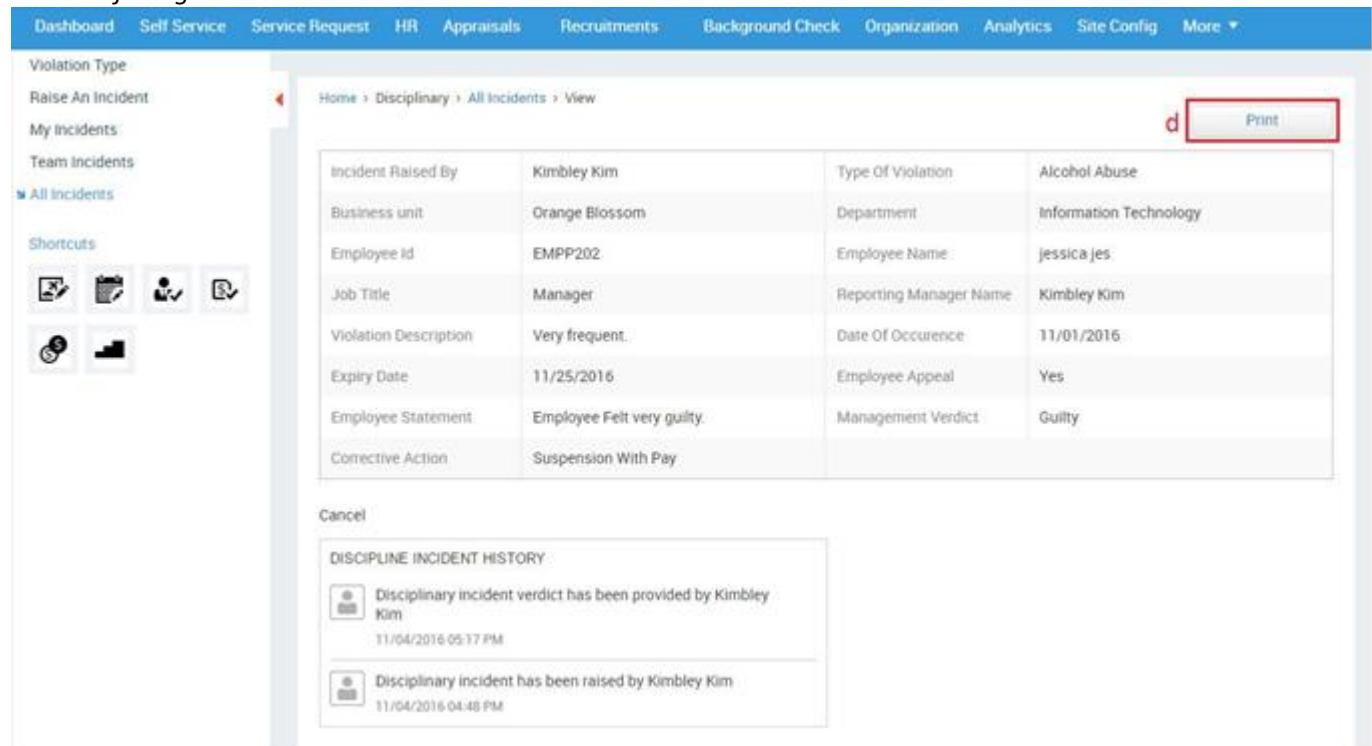
Action	Employee Name	Business Unit	Department	Violation Name	Date C	Time	Logs	Verdict
	jessica jes	Orange Blossom	Information Technology	Alcohol Abuse	11/01/2016	Yes		Guilty

At the bottom of the table, there are buttons for "C P" and "Records per page: 20".

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



The screenshot shows a software interface for managing incidents. On the left, there's a sidebar with links like 'Raise An Incident', 'My Incidents', 'Team Incidents', and 'All Incidents'. Below these are 'Shortcuts' with icons for search, calendar, user, and document. The main area has a breadcrumb navigation: Home > Disciplinary > All Incidents > View. A red box highlights the 'Print' button in the top right corner of the main content area. The main content displays a table with incident details:

Incident Raised By	Kimbley Kim	Type Of Violation	Alcohol Abuse
Business unit	Orange Blossom	Department	Information Technology
Employee Id	EMPP202	Employee Name	jessica jes
Job Title	Manager	Reporting Manager Name	Kimbley Kim
Violation Description	Very frequent.	Date Of Occurrence	11/01/2016
Expiry Date	11/25/2016	Employee Appeal	Yes
Employee Statement	Employee Felt very guilty.	Management Verdict	Guilty
Corrective Action	Suspension With Pay		

Below the table, there's a 'Cancel' button and a 'DISCIPLINE INCIDENT HISTORY' section containing two entries:

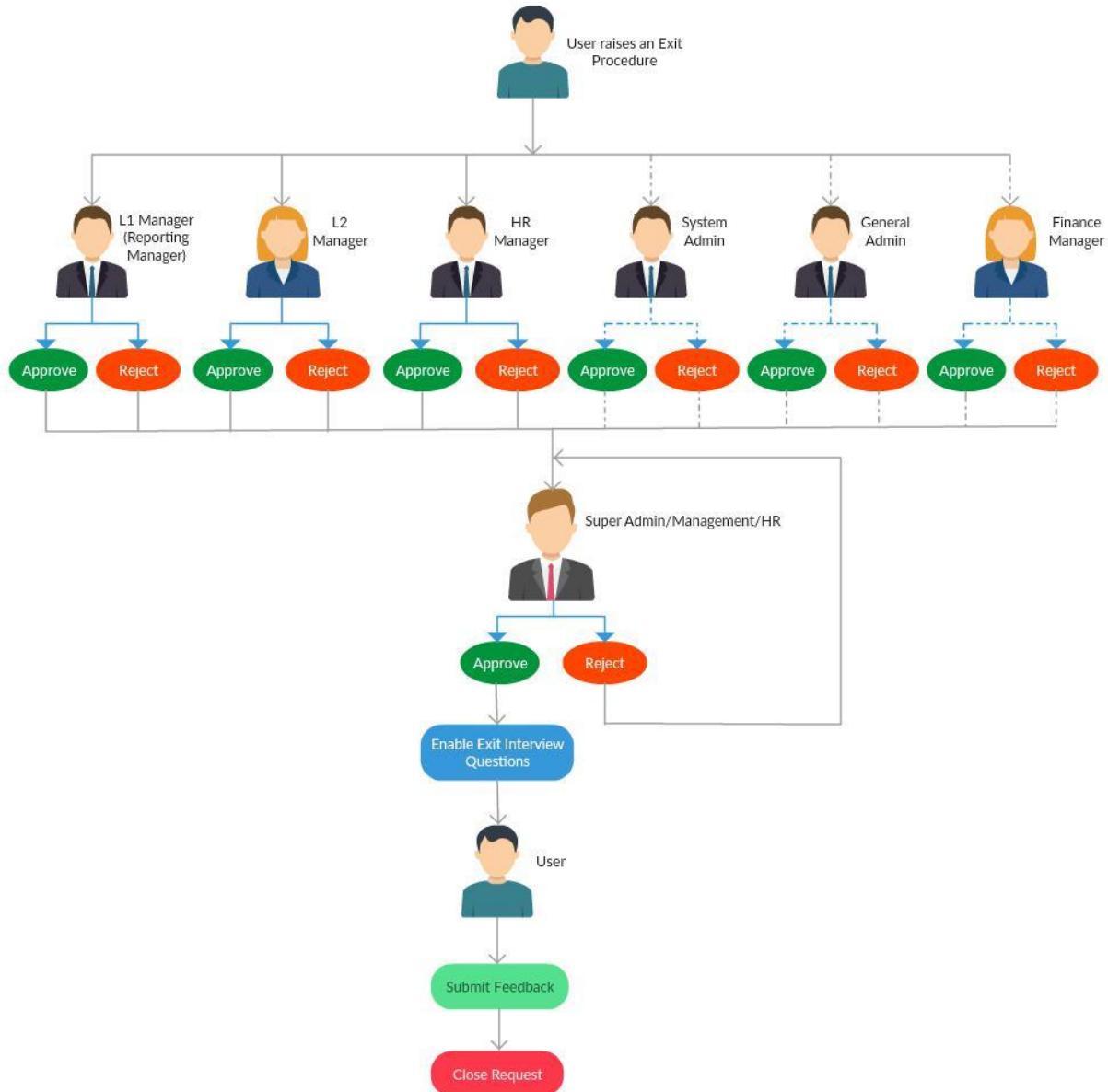
- Disciplinary incident verdict has been provided by Kimbley Kim
11/04/2016 05:17 PM
- Disciplinary incident has been raised by Kimbley Kim
11/04/2016 04:48 PM

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

The screenshot shows the HR module interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (which is highlighted in red), Appraisals, Recruitments, Background Check, Organization, Analytics, Site Config, Modules, Expenses, and More. On the left, a sidebar menu lists Employees, Roles & Privileges, Holiday Management, Leave Management, Exit Procedure (highlighted with a red box, labeled 'b'), and Exit Types (highlighted with a red box, labeled 'c'). The main content area displays a table titled 'Exit Types' with columns for Action, Exit Type, and Description. One row is visible: 'Resignation' with the description 'A resignation is the formal act of giving...'. At the bottom right of the content area, there are buttons for 'Add' (highlighted with a red box, labeled 'd') and 'Print'.

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

The screenshot shows the 'Add Exit Type' form. The top navigation bar and sidebar are identical to Figure 267. The main form has fields for 'Exit Type*' (with a red box around it, labeled 'f') and 'Description' (with a red bracket 'e' above it). Below the fields are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box, labeled 'g'.

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

Action	Exit type	Question	Description
	Resignation	Why are you leaving?	Explain in 10 words.
	Resignation	What could we have done better?	Explain in 10 words.

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

Action	Business Unit	Department	L2 Manager	HR Manager	System Admin	General Admin	Finance Manager
	Orange Blossom	HRM	Garley Jr	Janet Janet	Jennifer Gen	Kim Carl	Albert Janose

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

The screenshot shows the SAP Fiori interface for the HR module. The top navigation bar has tabs for Dashboard, Self Service, Service Request, HR (which is highlighted in red), Appraisals, Recruitments, Organization, Expenses, Disciplinary, and Time. On the left, there's a sidebar with sections for Employees, Exit Procedure (highlighted in red), All Exit Procedures, Contacts, and Shortcuts. Under Exit Procedure, 'Initiate/Check Status' is selected and highlighted in red. The main content area is titled 'Initiate/Check Status' and shows a table with columns: Action, Business Unit, Department, Exit Type, Status, and Initiated date. One row is visible: Action (eye icon), Business Unit (Orange Blossom), Department (HRM), Exit Type (Resignation), Status (Approved), and Initiated date (2017-04-06 10:25:47). At the bottom right of the table, there are buttons for 'Pin to shortcuts', '+Add' (highlighted in red), and 'C P'. Below the table, there are icons for search, add, and refresh, and a dropdown for 'Records per page' set to 20.

Figure 273

- Click **HR** in the top menu
- Click **Exit Procedure** on the left menu panel
- Click **Initiate/Check Status** in the submenu
- Click **+Add** button on the right side

Please refer Figure 274

The screenshot shows the 'Initiate/Check Status' page with the '+Add' button highlighted in red. The main content area is titled 'Exit Procedure Details'. It has two fields: 'Exit Type *' with a dropdown menu and 'Comments *' with a text input field containing placeholder text '50 characters remaining (50 maximum)'. A red bracket labeled 'e' groups the 'Comments' field and its placeholder text. Below these fields are 'Initiate' and 'Cancel' buttons, with 'Initiate' highlighted in red. The left sidebar and top navigation bar are identical to Figure 273.

Figure 274

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

18.5 How do I approve an Exit Procedure?

Please refer Figure 275

The screenshot shows the SAP Fiori interface for the HR module. The top navigation bar has tabs for Dashboard, Self Service, Service Request, HR (highlighted in red), Appraisals, Recruitments, Organization, Expenses, Disciplinary, and Time. The left sidebar under 'Employees' has 'Exit Procedure' (highlighted in red) and 'All Exit Procedures' (highlighted in red). The main content area displays a summary table for 'All Exit Procedures' with columns: Action, Employee, Employee ID, Business Unit, Department, Exit Type, Status, and Initiated date. A detailed table below shows records for Jessica Jazz. The bottom right shows a dropdown for 'Records per page' set to 20.

Action	Employee	Employee ID	Business Unit	Department	Exit Type	Status	Initiated date
	Jessica Jazz	EMPP207	Orange Blossom	IT	Resignation	Pending	07.04.2017 at 06:36:29 AM

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

The screenshot shows the 'Edit' screen for an Exit Procedure. The top navigation bar and sidebar are identical to Figure 275. The main content area has two main sections: 'Employee Details' and 'Exit Procedure Details'. Under 'Employee Details', there is a table with rows for Business Unit (Orange Blossom), Employee (Kimberly jazz), Employee ID (EMPP207), and Job Title (Employee). Under 'Exit Procedure Details', there is a table with rows for Exit Type (Resignation), Raised on (06.04.2017), Comments (--), and Process Status (Pending). Below these are tables for L1 Manager (Jackson Terrace, Pending), L2 Manager (Garley Jr, Pending), HR Manager (Janet Janet, Pending), System Admin (Jennifer Gen, Pending), General Admin (Kim Carl, Pending), Finance Manager (Albert Janose, Pending), and Comments (--) for each role.

Business Unit	Orange Blossom	Department	HRM
Employee	Kimberly jazz	Employee ID	EMPP207
Job Title	Employee	Joining Date	22.04.2014

Exit Type	Resignation	Raised on	06.04.2017
Comments	--	Process Status	Pending
Relieving Date	21.05.2017		

L1 Manager	Jackson Terrace	Status	Pending
Comments	--		
L2 Manager	Garley Jr	Status	Pending
Comments	--		
HR Manager	Janet Janet	Status	Pending
Comments	--		
System Admin	Jennifer Gen	Status	Pending
Comments	--		
General Admin	Kim Carl	Status	Pending
Comments	--		
Finance Manager	Albert Janose	Status	Pending
Comments	--		

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

Action	Employee	Employee ID	Business Unit	Department	Exit Type	Status	Initiated date
	Kimberly jazz	EMPP207	Orange Blossom	HRM	Resignation	Pending	06.04.2017 at 06:39:09 AM

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

Update Overallstatus

This is the final exit procedure status.

Status: * — e	Comments: * — f	Relieving Date:
Select Status		22.05.2017

Update g

Employee Details

Business Unit	Orange Blossom	Department	IT
Employee	Jessica Jazz	Employee ID	EMPP207
Job Title	Employee	Joining Date	28.04.2015

Exit Procedure Details

Exit Types	Decimation	Daiced on	07.04.2017
------------	------------	-----------	------------

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

HR

a

Employees

Holiday Management

Leave Management

Exit Procedure b

Exit Types

Exit Questions

Settings

Initiate/Check Status

All Exit Procedures c

Employee Configuration

Home > HR > Exit Procedure > All Exit Procedures

Pin to shortcuts

Action	Employee	Employee ID	Business Unit	Department	Exit Type	Status	Initiated date
d	Jessica Jazz	EMPP207	Orange Blossom	IT	Resignation	Approved	07.04.2017 at 06:36:29 AM

Records per page: 20

Figure 279

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

Please refer Figure 280

The screenshot shows the 'Configured Questions for Employee' screen. At the top, there's a breadcrumb navigation: Home > HR > Exit Procedure > All Exit Procedures > Edit. On the right, there's a red box labeled 'e +Add New Question'. Below it is a table with two rows. The first row has a checkbox labeled 'f Check All' and a column labeled 'Questions' containing 'Why are you leaving?'. The second row has two empty checkboxes and a column labeled 'Questions' containing 'What could we have done better?'. At the bottom left, there's a red box around the 'Save' button, and at the bottom right, there's a 'Cancel' button.

Figure 280

- Click to add new questions
- Check the checkbox to select questions
- Click **Save** button

18.8 How do I answer Questions for the Exit Interview?

Please refer Figure 281

The screenshot shows the 'Initiate/Check Status' screen. At the top, there's a breadcrumb navigation: Home > HR > Exit Procedure > Initiate/Check Status. On the right, there's a red box labeled 'Unpin from shortcuts'. Below it is a table with one row. The columns are labeled 'Action', 'Business Unit', 'Department', 'Exit Type', 'Status', and 'Initiated date'. The 'Action' column contains a red box with a question mark icon. The row data is: Action (with a question mark icon), Business Unit (Orange Blossom), Department (IT), Exit Type (Resignation), Status (Approved), and Initiated date (07.04.2017 at 06:36:29 AM). At the bottom left, there's a red box around the 'Action' column header, and at the bottom right, there are buttons for 'Add', 'G', and 'P'.

Figure 281

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

Please refer Figure 282

The screenshot shows the HR software interface with the following details:

- Top Navigation Bar:** Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Organization, Expenses, Disciplinary, Time.
- Left Sidebar:** Employees, Exit Procedure, All Exit Procedures, Contacts, Shortcuts (with icons for People, Document, Grid, etc.).
- Breadcrumb:** Home > HR > Exit Procedure > Initiate/Check Status > Edit.
- Main Content Area:** A table with two rows. The first row has "Question" and "Comments" columns. The second row has "Question" and "Comments" columns. The "Comments" column for the second row is highlighted with a red bracket labeled "e".
- Buttons at the bottom:** Save (highlighted with a red box labeled "f") and Clear.

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

The screenshot shows the HR module interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR (selected), Appraisals, Recruitments, Background Check, Organization, Analytics, Expenses, Assets, Disciplinary, and Time. On the left, a sidebar menu lists Employees, Holiday Management, Leave Management, Exit Procedure (selected), Exit Types, Exit Questions, Settings, Initiate/Check Status, All Exit Procedures (selected), and Employee Configuration. The main content area displays a summary of exit procedures: All (2), Pending (0), Approved (2), and Rejected (0). Below this is a table titled 'All Exit Procedures' with columns for Action, Employee, Employee ID, Business Unit, Department, Exit Type, Status, and Initiated date. A record for Jessica Jazz is shown. At the bottom, there are search and filter options.

Figure 283

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

Please refer Figure 284

The screenshot shows the HR module interface, similar to Figure 283. The top navigation bar and sidebar menu are identical. The main content area shows a message: 'Exit Procedure has been completed.' Below this is a table with two rows. The first row has 'Question' and 'Comments' columns. The second row has 'Why are you leaving?' and 'I have got a new job opportunity.' The third row has 'What could we have done better?' and 'Everything is Awesome.' The entire table is highlighted with a red border.

Figure 284

- 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.

The screenshot shows the HR application's interface. At the top, there is a navigation bar with links: Dashboard, Self Service, Service Request, HR (which is highlighted in dark blue), Appraisals, Recruitments, Background Check, Organization, Analytics, Expenses, Assets, and More. Below the navigation bar, on the left, is a sidebar under the 'Employees' section. It includes links for Holiday Management, Leave Management, Employee Configuration, and Contacts. Under 'Shortcuts', there are several icons representing different employee management functions. The main content area is titled 'Home > HR > Employees > Edit'. It displays an employee record for 'Mr. John Michael' with Employee Id 'EMPP0002'. The contact number is listed as '1234567890'. There is a red box highlighting the 'Edit Profile Photo' button next to a placeholder image. Below this, there are two buttons: 'Active' (green) and 'Inactive' (grey). The central part of the screen contains various employee details in a grid format, such as Employee Code 'EMPP', Employee Id '0002', Prefix 'Mr.', First Name 'John', Last Name 'Michael', Mode of Employment 'Direct', Role 'Management', Email 'kadriye@appllica.com', Business Unit 'AsiaGlobal', Department 'QualityAssurance', Reporting Manager 'David Brainard, Departm...', Job Title 'Select Job Title', Position 'Customer Relations', Employment Status 'Full-time Employee', and Date of Joining '2023-01-01'. At the bottom of the screen, there is a breadcrumb trail: Recently viewed > Employees > Employees Edit > Employees Edit. A small 'pdf' icon is also visible at the bottom right.

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:

The screenshot shows a configuration wizard interface with three steps:

- Step 1: Configure Leave Types** (Active):
 - Description: Configure the leave types used in your organization.
 - Status: In Progress
 - Fields:
 - Leave Type * (Input field)
 - Number of Days * (Input field)
 - Buttons:
 - ADD LEAVE TYPE (Link)
 - SAVE (Red button)
- Step 2: Configure Holidays**:
 - Description: Configure the holidays used in your organization.
 - Status: In Progress
- Step 3: Appraisals**:
 - Description: Configure the performance appraisal parameters used in your organization.
 - Status: In Progress

Top navigation buttons: [Configure Later](#) and [Back To Site](#).

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

Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use.

[Configure Later](#) [Back To Site](#)

 Configure Leave Types

Configure the leave types used in your organization.



 Configure Holidays

Configure the holidays used in your organization.

Completed

In Progress

In Progress

 Appraisals

Configure the performance appraisal parameters used in your organization.

Configure Holidays

[ADD EMPLOYEE](#)

Holiday Group *

Select Holiday Group | ▾

[Add Holiday Group](#)

Holiday *

Date ? *

[ADD HOLIDAY](#)

[SAVE](#)

[◀ Prev](#)

[Next ▶](#)

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

Configuration Wizard allows you to configure settings that reflect requirements unique to your organization and make your application ready to use.

[Configure Later](#) [Back To Step](#)

Configure Leave Types

Configure the leave types used in your organization.

Configure Holidays

Configure the holidays used in your organization.

Appraisals

Configure the performance appraisal parameters used in your organization.

Completed

Completed

In Progress

Configure Performance Appraisal

Appraisal Parameter *

Select Parameter | ▾

Add Parameter

Question *

Description

300 characters remaining (200 measured)

 ADD QUESTION

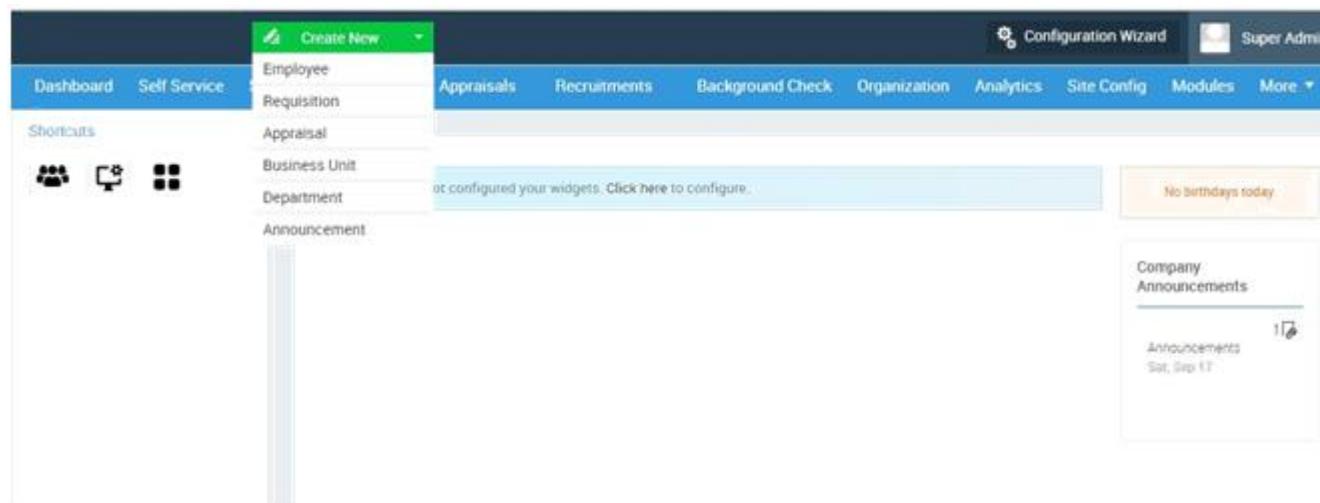
 SAVE

 Prev

- **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 screenshot of the application interface showing the 'HR' menu item highlighted in red. The left sidebar has a 'Contacts' section with a red bracket labeled 'b' and a red bracket labeled 'c' pointing to the 'Vendors' and 'Clients' sub-sections respectively. The main content area shows a table of 'Vendors' with columns: Action, Name, Contact Person, Country, State, City, and Primary Phone. The table contains four rows of data. At the bottom, there are buttons for 'C P' and 'Records per page 20'. The overall layout is consistent with the previous screenshot, showing a clean and organized interface for managing organizational contacts.

- 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

