Standard Operating Procedure – TCP Portal

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| Prepared by | Date | Version |
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Introduction:

This portal is about to maintain employee details, leave history, inventory items, inventory history and holiday list. The portal has 3 Major Roles which are Manager, Admin & Employee, all three have different criteria which has been explained in this document. Every major action has been logged for future reference. All users have one login screen, menus are listed on the left hand side sidebar along with the logged in user name, code and image. On top right, they can see logged in user name and image, once user click there, they will have a dropdown model where they can see their designation and button to redirect them to their profile page and a logout button to sign off the portal.

User Roles

1. Manager
2. Admin
3. Employee
4. Manager Modules:
5. Login
6. Dashboard
7. Profile

* My Profile
* Leave History
* Apply Leave

1. Employees
2. Employee Leave History
3. Leave Calendar
4. Inventory

* Inventory Category
  + Inventory List
  + Employee Inventory Requests
  + Inventory History
  + Request Inventory

1. Admin Modules:
2. Login
3. Dashboard
4. Profile
   * My Profile
   * Leave History
   * Apply Leave
5. Employees
6. Leave Calendar
7. Inventory
   * Inventory Category
   * Inventory List
   * Employee Inventory Requests
   * Inventory History
   * Request Inventory
8. Employee Modules:
9. Login
10. Dashboard
11. Profile
    * My Profile
    * Leave History
    * Apply Leave
12. Leave Calendar
13. Inventory
    * Inventory History
    * Request Inventory

*LOGIN:*

All Users will have a common login page. Once the user logged in, every user role has different menu or different actions.

User will find “Forgot Password” button on this page to reset their password. Once user click on this button I it will redirect them to the next page, where they can enter username and official email address. Once they submit this page one email will be sent to user’s official email address where their login details of the portal has been sent.

*DASHBOARD:*

1. **Manager**

This page has 4 sections which are

* + 1. Department List
  1. The Manager will see list of department in the office.
  2. The Manager can see the employee list by clicking each department.
     1. Permission Request
  3. Manager will see a list of permissions (late coming or leaving early from the office) applied by employees will be listed here.
  4. The Manager can Approve or Reject the permission request which is applied by employee with their comments.
  5. The Employee will receive an email once manager reacted to this request to their official email address
  6. This has only limited details of the request.
     1. Leave Request

Leave Request is as same as permission request, instead of permission its leave request.

* + 1. Quick Email
       - 1. In this section user can send any mail to employees or others using his official email address.
         2. User can send bulk mail by entering each email address or by choosing emails from the email list.
         3. Every mail sent from here will use the official email address and will be recorded.

1. **Admin**

This page has 2 sections which are

1. Leave History
   1. Here admin can see employee’s leave history for the current month.
   2. With this history admin can use to calculate leaves of employees to deduct salary or leave balance
2. Quick Email
   1. In this section user can send any mail to employees or others using his official email address
   2. User can send bulk mail by entering each email address or by choosing emails from the email list
   3. Every mail sent from here will use the official email address and will be recorded
3. **Employee**

This page has 2 sections which are

1. Leave History
   1. Here Employee can see their complete leave and permission history for the current Year.
   2. They can also see the leave balance of the current year.
   3. Employee can see the request status and comment from the manager of the request.
   4. This has limited details only.
2. Quick Email
   1. In this section user can send any mail to employees or others using his official email address
   2. User can send bulk mail by entering each email address or by choosing emails from the email list
   3. Every mail sent from here will use the official email address and will be recorded

*Profile:*

This section has 3 sub menus, which are

* + 1. My Profile

1. User can see their personal details here and they have 2 buttons, “Edit Profile” and “Change Password”
2. User can edit their Personal details alone, they can change their official details like department, designation, EMP Code, etc.
3. To edit their edit details they need to send request mail to make changes in their personal details, either admin or manager has to approve it.
4. Once request approved user will receive mail with a link to edit their profile.
5. Using Change Password button user can change their password for this no permission required.
   * 1. Leave history
6. Here user will see their complete leave and permission history with all the details.
7. User can cancel their request if they applied wrongly or no need of it, manager can approve or reject accordingly.
8. User will have 4 options at the bottom of the leave history which are
9. “Total Leave” – This will show total leave applied.
10. “Total Applied” – This will show the entire request applied with leave and permission.
11. “Total Approved” – This will give you the total request approved by manager.
12. “Total Rejected” – This will give you the total request rejected by the manager.
    * 1. Apply Leave
13. Here user can apply Leave / Permission.
14. User need to select, request type either Leave or Permission.
15. If user selected Leave, then they has to choose “Leave Type”- either full day or half day, “Leave Date” – From – To, “Reason” and “Is Informed” – if informed to manage, then “Yes” else “No”.
16. Once user submitted email will sent to the manager and cc to admin, manager can approve or reject the request, the same will to email to the user and cc to admin.

*Employees:*

This module can be accessible only to Manager and Admin.

1. List Of Employees
   * + - 1. User can see the Employee list of all departments.
         2. User can search employee using their details or department.
         3. User can able to view every employee’s full details by clicking the icon at the end of each row.
         4. User will have the option to add employees by clicking the “Add New Employee” text at the top of the page.
2. Add Employee
   1. User can create login details for new employees with their details.
   2. Once details created and saved employee can’t able to change the official information of the employee.
   3. Only admin or manager can change their details on “Edit Employee” page, which will be seen on the employee’s view page
3. Edit Employee
   1. It’s same as creating employee, whereas here we edit employee details instead of adding.
   2. User can’t able to edit the employee’s username, once it’s created we can’t able to change username here.
4. View Employee
   1. Here user will see employee’s full details which we collected from them on the left side.
   2. Whereas on the right side, we can see a list of leave and permissions they applied and the status with manager's comments along with their leave balance of the current year.

*Employees Leave Request:*

This module can be accessible only to Manager.

* + - * 1. Manager will see all the leave or permission requests applied by employees for the current month.
        2. Manager can respond to the request which was applied by employees.
        3. Applied request will be either new or cancellation.
        4. Manager can respond to the employee’s request by clicking the icon under “Action” respectively.
        5. Once the icon clicked, there will be a pop open where manager can respond to that request.
        6. Manager will receive email regarding every request applied by employee.
        7. Once manager respond to the request employee will be notified by email.
        8. In the email received to manager will have once link where the manager will have full details and can respond from there itself.

*Leave Calendar:*

* + - 1. **Employee**

This page has 2 sections, which are

1. Calendar
   * + - 1. Employees will see holidays / Official Leave of the current month on the monthly calendar
         2. They can also see the leave and permission which they have taken for the current month
         3. All 3 lists of holidays/official leave, permission and leave are mentioned in 3 different colors.
         4. User can change the month to previous or next to see their leave history or official leave.
2. List of Holidays
   * 1. Here user will see a list of official leave for the current month.
        1. **Manager and Admin**

This page has 2 sections, which are

* + 1. Calendar

1. Employees will see holidays / Official Leave of the current month on the monthly calendar
2. They can also see the leave and permission which are taken by all the employees for the current month.
3. All 3 lists of holidays/official leave, permission and leave are mentioned in 3 different colors.
4. User can change the month to previous or next to see their leave history or official leave.
   * 1. List of Holidays
        1. Here user will see a list of official leave for the current month.

*Inventory:*

This module has 5 sections, in this first 3 sections will be used only by the Manager and Admin and remaining 2 sections can be used by all users.

1. Inventory Category
   * + - 1. Here user will have list of inventory categories and details of whom and when it was created.
         2. User can manage all the inventory categories like add, edit and delete.
         3. User can Add Categories by clicking text on top “Add New Category”, likewise for edit and delete we have a button under action respectively
         4. User can search any categories by its name or any of its details.
2. Inventory List
3. Here User will see list of inventory items and its details.
4. User can manage all the inventory categories like add, edit and delete.
5. User can add new item by clicking text on top “Add New Item List”, likewise for edit and delete we have a button under action respectively.
6. User can search any items by its name or any of its details.
7. Employee Inventory Requests
   * + - 1. Here user will see the entire inventory request made by employees with the request status.
         2. Used different color to differentiate each request type made by employees.
         3. Request types are “Request Pending, Request Approved, Return Request, Request Rejected, Return Rejected and Item Returned”.
         4. Once request submitted by Employee it will work same as leave request, manager or admin will get emails regarding this request.
         5. From the email they have link to Approve or Reject the request, likewise they will receive for return the item also.
         6. Once the Manager / Admin, Approves or Reject the request user will receive an email for the same.
         7. Manage or Admin can reject the return request when the item has been damaged or misused
8. Inventory History
9. Here user will have a list of requests they made and their status.
10. User will receive mail once manager or admin approved their request.
11. User has to raise a return request when they return the item.
12. Authorized person can reject the request / return request.
13. User can see the Request Out/In Status commented by an authorized person.
14. Request Inventory
15. User can make their inventory request here.
16. User can’t apply to the item which was holding other employees.
17. In the list, employee will not find the item which is folded by others.

Please use different colors to make or note any changes to the modules mentioned in the document.

Modules are subject to change.

Thank you.