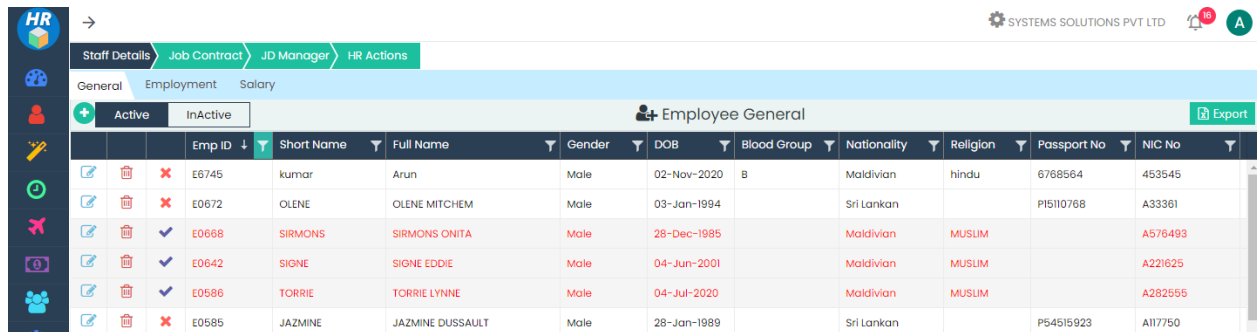# HR-METRICS

HRIS & ACTIONS

STAFF DETAILS

GENERAL

Here you can view the general details about the employees such as Personal and

Contact details. The Inactive tab used to show the details of Terminated/ Resigned

employees.

Steps:

1. HRIS & Actions > Staff Details > General

2. To add a new employee, click on " ⊕ " button

3. By clicking on " ✎ " button to edit the employee details

4. By clicking on " 🗑 " to delete your employee record, if needed.

5. To verify the staff General details, click ✔ and click ✖ to un-verify the record

6. Also, you can export the list into the .xls file by using "**Export**".

Note: The Approval rights should be enabled from the User Rights Management > User

Groups

EMPLOYMENT

Employment page is used to view the employee's Job/ Hiring details. This page includes Job Offer Details, Attendance/ Holiday details and Workhour details. You can export the employment detailed list into the excel sheet.

Attendance / Holidays, Workhour details can be configured by the Section wise in control panel. Once you entered General Details of employee, the page will navigate to Employment Details.
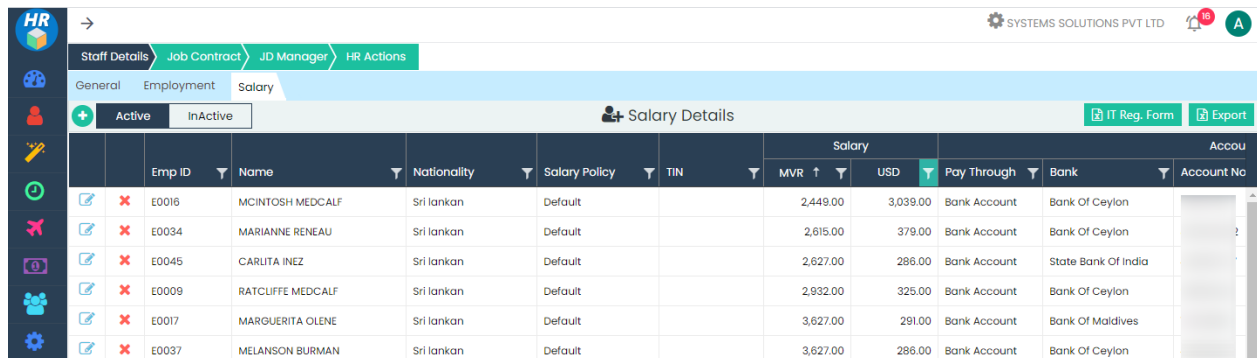

Steps:

1. Select Job Offer details from the drop down list (Division, Department, Section, Designation, Leave Policy can be created in Control Panel)

2. Provide the Attendance and Holiday details.

3. Provide Work Hours Details.

4. Click Save & Continue.

SALARY DETAILS

Configure the salary details for every employee by selecting the salary policy and the enter the salary Details

Note: The Salary policy should be created from Control Panel > Salary Panel > Salary Policies

Steps:

1. Go to Staff Details > Salary

2. Click on + to enter the Salary Details

3. By clicking on " " button to edit the salary details.

4. Need to approve the salary record, after updating the salary details.

   a. To approve

   b. To unapproved

5. By click " Export" to get the data in .xls format

Get Employee Report – You can print the employee report from Staff Details > Preview page > Print

JOB CONTRACT

Job contract page is used to create the Contract records for the employees. This page includes the contract details, contract reports etc.,

Steps:

1. Access Job Contract

2. Click on +

3. Search and select employee from the drop down and provide the following details:

      a. Contract Start Date

      b. Period (In Months) – Provide the contract period

      c. Contract Expired Date

4. Click "Save"

5. To Extend – Click `Extend` and provide the Extend contract details

EXTEND CONTRACT – CNT-20-0000001	✖
Contract Start Date	10-Sep-2022 📅
Period (In Months)	15
Contract End Date	09-Dec-2023
	✔ Save

6. Click `History` to view all the old Contract records against the employee

CONTRACT HISTORY – CARLITA CARBONELL – E0023 ✖

	Ref. No	DOJ	Contract Start	Contract End	Contract Period
🖨 ▾	CNT-20-0000001	11-Aug-2017	01-Jun-2020	30-Jun-2020	1 month(s)
🖨 ▾	CNT-21-0000002	11-Aug-2017	01-Jul-2020	31-Jul-2020	1 month(s)
🖨 ▾	CNT-21-0000003	11-Aug-2017	01-Aug-2020	31-Dec-2020	5 month(s)

JD MANAGER

JD Manager allows to organize job descriptions also you can assign them to the employees based by the designation as well individuals!

Steps:

1. Go to JD Manager

2. Search and select the designation to add descriptions

3. Click "+"

4. Add Category and Description of the selected job designation

5. Click "Save"
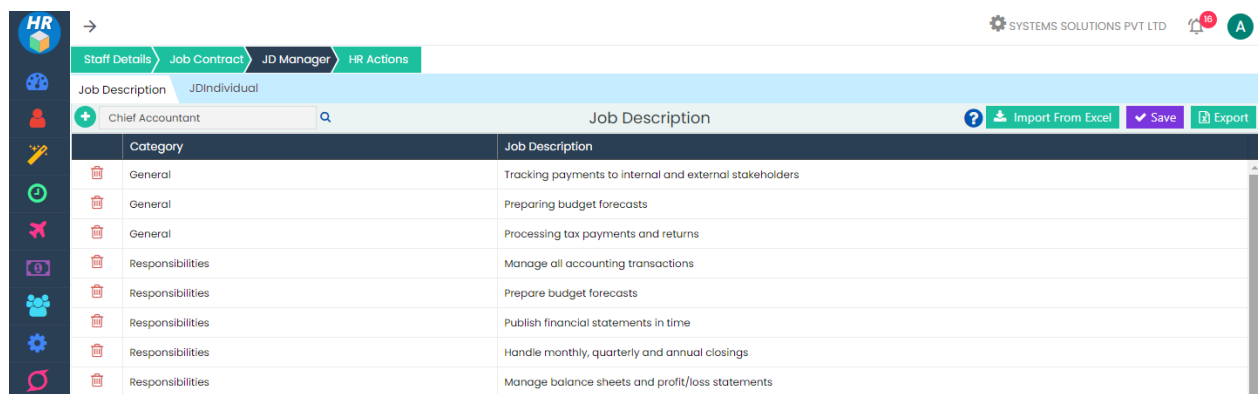
Import from Excel

Easy import option to upload the bulk descriptions within a single move!

- Just click on "?" to download the upload template

- Fill the respective columns in a downloaded template and save the template

- Now, click on "Import from Excel" to search and select the file to import

	A	B	C	D	E	F
1	Division	Department	Section	Designation	Category	JobDescription
2	Head Office	Accounts	Finance	Chief Accountant	General	Tracking payments to internal and external stakeholders
3	Head Office	Accounts	Finance	Chief Accountant	General	Preparing budget forecasts
4	Head Office	Accounts	Finance	Chief Accountant	General	Processing tax payments and returns
5	Head Office	Accounts	Finance	Chief Accountant	Responsibilities	Manage all accounting transactions
6	Head Office	Accounts	Finance	Chief Accountant	Responsibilities	Prepare budget forecasts
7	Head Office	Accounts	Finance	Chief Accountant	Responsibilities	Publish financial statements in time
8	Head Office	Accounts	Finance	Chief Accountant	Responsibilities	Handle monthly, quarterly and annual closings
9	Head Office	Accounts	Finance	Chief Accountant	Responsibilities	Manage balance sheets and profit/loss statements
10	Head Office	Accounts	Finance	Chief Accountant	Responsibilities	Report on the company's financial health and liquidity

HR ACTIONS

HR Action dashboard helps to perform actions like Dislodgment, Admonition, Suspension, Separations

Dislodgment

Dislodgment is a process of applying actions like Increment, Transfer, Promotion, Demotion, and Employment Change.

1. Select an employee from the dropdown list.
2. Fill in the following details:
   a. Action Type
   b. Effective From – The changes will be applied from the effective date
   c. Job Offer Details
   d. Attendance / Holiday
   e. Salary Details
3. Click "Save"

SARA IBRAHIM – 283				✔ Save	✖ Cancel

EmployeeID | **Action Type** | **Effective From**
IBRAHIM – 283 ▾ 🔍 | INCREMENT ▾ | 11-Mar-2019 📅

Job Offer Details

Entity	Division	Department	Section
HEAD OFFICE ▾	HEADOFFICE ▾	HUMAN RESOURCE ▾	VISA & TICKETING ▾

Designation	Category	Superior
MANAGER VISA AND TICKETING ▾	MANAGEMENT ▾	SUZAN – 0001 ▾

Attendance / Holidays

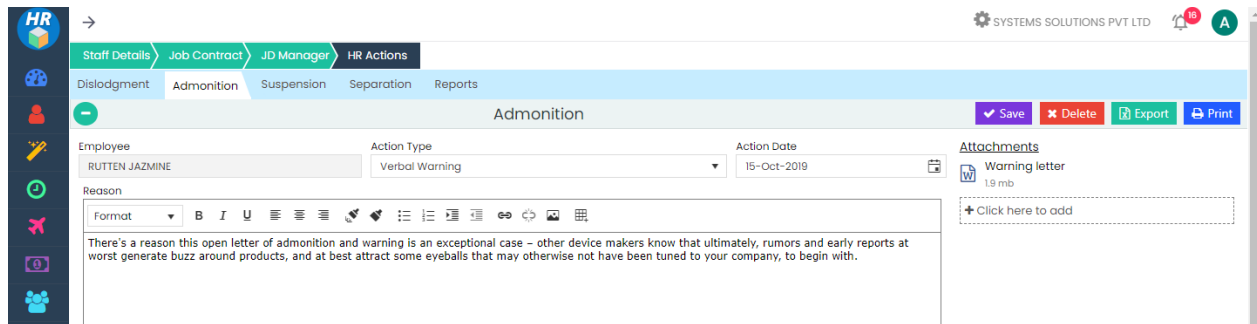| Public Holiday	Government Holiday	Week Off Type	Week Off 1	Week Off 2	Week Off 2 Policy
Holiday ▾	Working Day ▾	Static ▾	Friday ▾	▾	▾

Working Hour Type
Flexible ▾

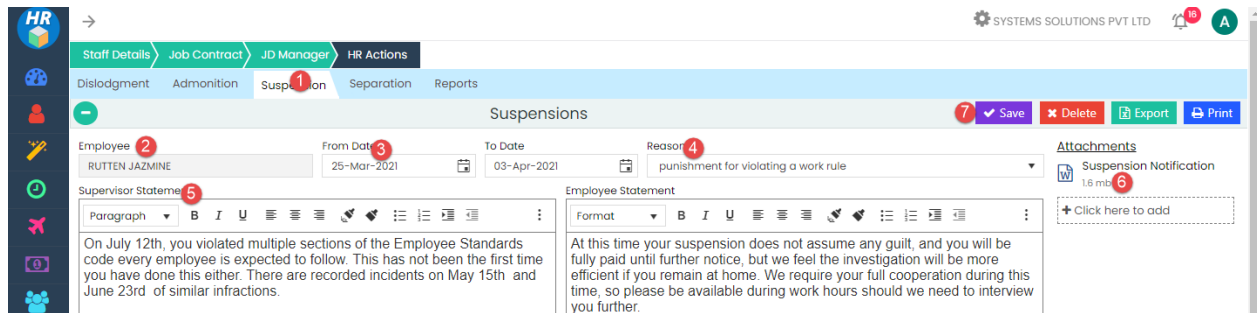| Work Hours Details	Start Time	Work Hours/Day	Min. Work Hours/Day	Break	Att Leniency (mins)	Required Punches
Normal Days	08:30 🕐	08:00 🕐	08:00 🕐	00:00 🕐	30	2
Half Day	00:00 🕐	00:00 🕐	00:00 🕐	00:00 🕐	0	0
Gov. Holiday	00:00 🕐	00:00 🕐	00:00 🕐	00:00 🕐	0	0

Admonition

A notice of reprimand called Admonition that is issued for the (mis)conduct of an employee.

1. Select an employee from the dropdown list

2. Provide Action Type, Action Date and Reason of the admonition.

3. Attachments – To upload the statement or report which is relevant to the Admonition

4. Click on "Save

Suspension

An employee who needs to be suspended should be created from system by using Suspension module. The salary for the suspended period will be deducted which is based on the Allowance deduction settings

1. Select an employee from the dropdown list

2. Provide From and To date, Reason, Supervisor Statement and Employee Statement.

3. Click on "Save".

Separation

Employe entry who needs to be terminated or resigned should fill his name with ID, last working day, action type,notice period,reason and save. The Full & Final settlement will be generated upto the last working day.

1. Select an employee from the dropdown list

2. Provide Effective Date, Action Type, Notice Period and Reason.

3. Notice Period

    a. Paid to: Employee -> The employee should work upto the notice period & the salary will be generated for those days

    b. Paid to: Employer -> Salary deduction should be applied to the days of notice

4. Click on "Save".

Reports

The Employee Reports shows the general Information of employees and view the enabled features of the employee. Also, you can view the resigned date of the employee. Reports are used to print the Reference letter , Bank letters and other employee related document.

Emp ID	Name	DOB	Designation	DOJ	Division	Department	Section	Pensi
0001	Buddhika Sampath Bata…	10-Aug-1977	Chief Engineer	01-Jul-2018	You & Me by Cocoon	Engineering	ENG	
0003	Dulce Camille Sanchez Z…	15-Jul-1991	Senior HR Executive	25-Nov-2018	You & Me by Cocoon	Human Resources	HR	
0004	Lorenzo Benvenuti	14-Aug-1971	General Manager	01-Dec-2018	You & Me by Cocoon	Administration	ADM	
0007	Gallage Chandana Hem…	22-Jul-1977	Chief Accountant	10-Dec-2018	You & Me by Cocoon	Finance	FIN	
0008	Kantheeban Sathasivam	06-Oct-1989	Accountant	10-Dec-2018	You & Me by Cocoon	Finance	FIN	
0009	Hussain Shaniz	18-Mar-1983	Assistant Housekeeper	13-Dec-2018	You & Me by Cocoon	Housekeeping	HK	✔
0010	Berna Janice Arizala	06-Dec-1992	Commi	16-Dec-2018	You & Me by Cocoon	F&B Kitchen	FBK	
0011	Mohamed Shifaaq	26-May-1984	Excursion Executive	16-Dec-2018	You & Me by Cocoon	Administration	EXC	✔