HRMS User Manual

Human Resource Management System

Version: 1.0 **Last Updated:** February 2026

Table of Contents

1. Introduction

1.1 About HRMS

HRMS (Human Resource Management System) is a comprehensive platform designed to streamline HR operations including:

- Employee information management
- Leave tracking and approvals
- Payroll processing

- Performance appraisals
- Benefits and loan management
- Comprehensive reporting

1.2 System Requirements

- **Browser:** Chrome, Firefox, Safari, or Edge (latest versions)
- **Screen Resolution:** Minimum 1280 x 720
- **Internet Connection:** Stable broadband connection

1.3 User Roles

Role	Access Level
Employee	Self-service portal only
Manager	Team management + self-service
HR Staff	Full HR module access
HR Admin	Full access including setup
System Admin	Complete system access

---

2. Getting Started

2.1 First-Time Registration (Employee Self-Service)

1. Navigate to the HRMS login page
2. Click **"Sign up here"** link
3. Enter your details:
4. **Email Address:** Your work or personal email
5. **Employee Number** OR **Ghana Card Number**
6. Click **Continue**
7. Check your email for a verification link
8. Click the link and set your password
9. Complete the onboarding process

2.2 Logging In

1. Go to the HRMS login page
2. Enter your **Email Address**
3. Enter your **Password**
4. Click **Sign In**

2.3 Navigation Overview

The main navigation is located in the left sidebar:

Self-Service Section: - My Profile - My Leave - My Appraisal

HR Management Section: (HR Staff/Admin only) - Dashboard - Employees - Leave - Payroll - Benefits - Reports - Settings

Administration Section: (HR Admin only) - Appraisals - Leave Approvals - Loan Management - Process Payroll - Employee Transactions - Data Import

Setup Section: (HR Admin only) - Payroll Setup - HR Setup - Performance Setup

---

3. Dashboard

The dashboard provides an at-a-glance view of key HR metrics.

3.1 Key Statistics

- **Total Employees:** Current headcount
- **New Hires:** Employees joined this month
- **Pending Leave:** Leave requests awaiting approval
- **Active Loans:** Outstanding employee loans

3.2 Charts and Visualizations

- **Employees by Department:** Distribution across departments
- **Employees by Status:** Active, probation, on leave, etc.
- **Gender Distribution:** Male/Female ratio
- **Payroll Trends:** Monthly payroll costs
- **Leave by Type:** Breakdown of leave types used

3.3 Quick Actions

- Add Employee
- Process Payroll
- Leave Approvals
- View Reports

---

4. Employee Management

4.1 Viewing Employees

1. Navigate to **Employees** in the sidebar
2. Use filters to narrow results:
3. Department
4. Status (Active, Probation, etc.)
5. Staff Category
6. Use the search bar to find specific employees
7. Click on an employee row to view details

4.2 Adding a New Employee

1. Click **Add Employee** button
2. Fill in the required sections:

Personal Information: - Title, First Name, Middle Name, Last Name - Date of Birth, Gender, Marital Status - Nationality, Ghana Card Number - SSNIT Number, TIN Number - Contact details (email, phone)

Address Information: - Residential Address - Postal Address - Digital Address

Employment Details: - Employee Number - Employment Type (Permanent, Contract, etc.) - Date of Joining - Division, Directorate, Department - Position, Grade - Staff Category - Supervisor

Bank Details: - Bank Name - Bank Branch - Account Number

1. Click **Save** to create the employee record

4.3 Editing Employee Information

1. Navigate to the employee's profile
2. Click the **Edit** button
3. Update the necessary fields
4. Click **Save Changes**

4.4 Employee Status Management

Status Types: - **Active:** Currently employed - **Probation:** Under probationary period - **On Leave:** Currently on approved leave - **Suspended:** Temporarily suspended - **Terminated:** Employment ended

To change status: 1. Open employee profile 2. Click **Change Status** 3. Select new status 4. Provide reason if required 5. Confirm the change

---

5. Leave Management

5.1 Leave Types

Common leave types include: - Annual Leave - Sick Leave - Maternity Leave - Paternity Leave - Compassionate Leave - Study Leave - Unpaid Leave

5.2 Applying for Leave (Employee)

1. Navigate to **My Leave** in the sidebar
2. Click **Apply for Leave**
3. Fill in the form:
4. Leave Type
5. Start Date
6. End Date
7. Reason
8. Attach supporting documents (if required)
9. Click **Submit**

5.3 Checking Leave Balance

1. Go to **My Leave**

2. View your balance summary showing:
3. Total entitlement
4. Used days
5. Pending requests
6. Available balance

5.4 Approving Leave Requests (Manager/HR)

1. Navigate to **Administration** → **Leave Approvals**
2. View pending requests
3. Click on a request to review details
4. Click **Approve** or **Reject**
5. Add comments if necessary

5.5 Leave Calendar

1. Navigate to **Leave** in HR Management
2. Click **Calendar View**
3. View team/department leave schedule
4. Filter by department or employee

---

6. Payroll Management

6.1 Payroll Overview

The payroll module handles: - Salary computation - Tax calculations (PAYE) - SSNIT contributions - Allowances and deductions - Bank file generation - Payslip generation

6.2 Payroll Periods

Payroll runs within defined periods: - **Status Types:** - OPEN: Ready for processing - PROCESSING: Currently being computed - COMPUTED: Calculations complete - APPROVED: Ready for payment - PAID: Payment completed - CLOSED: Period finalized

6.3 Processing Payroll

1. Navigate to **Administration** → **Process Payroll**

2. Select the payroll period
3. Review employees included
4. Click **Compute Payroll**
5. Review computation results
6. Click **Approve** to finalize
7. Generate bank files and payslips

6.4 Employee Transactions

Add one-time or recurring transactions:

1. Go to **Administration** → **Employee Transactions**
2. Click **Add Transaction**
3. Select:
4. Employee
5. Transaction Type (Allowance/Deduction)
6. Amount
7. Effective Period
8. Click **Save**

Transaction Types: - Overtime - Bonus - Arrears - Loan Deduction - Advance Deduction - Other Allowances/Deductions

6.5 Viewing Payslips

For Employees: 1. Go to **My Profile** → **Payslips** 2. Select the period 3. View or download payslip

For HR: 1. Go to **Payroll** → Select period 2. Click **Payslips** 3. Download individual or bulk payslips

6.6 Bank File Generation

1. Navigate to processed payroll run
2. Click **Generate Bank Files**
3. Files are created per bank
4. Download CSV/Excel files for bank upload

7. Performance & Appraisals

7.1 Appraisal Cycle

The appraisal process follows this flow:

1. **Goal Setting** (January)
2. Employee sets goals
3. Manager approves goals
4. **Mid-Year Review** (July)
5. Progress review
6. Goal adjustments
7. **Year-End Appraisal** (December)
8. Self-assessment
9. Manager review
10. Final rating

7.2 Creating an Appraisal (HR/Admin)

1. Navigate to **Administration** → **Appraisals**
2. Click **New Appraisal**
3. Select:
4. Appraisal Cycle
5. Employee
6. Click **Create Appraisal**

7.3 Setting Goals (Employee)

1. Go to **My Appraisal**
2. Click **Add Goal**
3. Enter:
4. Goal Title
5. Description
6. Success Criteria
7. Target Date

8. Weight (percentage)
9. Click **Save**
10. Submit goals for manager approval

7.4 Self-Assessment (Employee)

1. Go to **My Appraisal**
2. For each goal:
3. Rate your achievement (1-5)
4. Add comments
5. Complete competency ratings
6. Complete core values assessment
7. Click **Submit Self-Assessment**

7.5 Manager Review

1. Navigate to **My Appraisal** → **Team Appraisals**
2. Select employee appraisal
3. Review self-assessment
4. Provide manager ratings
5. Add comments and feedback
6. Click **Complete Review**

7.6 Appraisal Scoring

Scores are weighted as follows (configurable): - **Objectives/Goals:** 60% - **Competencies:** 20% - **Core Values:** 20%

Rating Scale: | Rating | Description | Score Range | |--------|-------------|-------------| | 5 | Outstanding | 90-100% | | 4 | Exceeds Expectations | 75-89% | | 3 | Meets Expectations | 60-74% | | 2 | Needs Improvement | 40-59% | | 1 | Unsatisfactory | 0-39% |

7.7 Probation Assessments

For employees on probation:

1. Go to **Administration** → **Probation Assessments**
2. View employees due for assessment
3. Complete assessment form:

4. Job Knowledge
5. Work Quality
6. Attendance & Punctuality
7. Teamwork
8. Communication
9. Initiative
10. Make recommendation:
11. Confirm employment
12. Extend probation
13. Terminate

---

8. Benefits & Loans

8.1 Employee Loans

Applying for a Loan: 1. Navigate to **Benefits** → **Loans** 2. Click **Apply for Loan** 3. Enter: - Loan Type - Amount Requested - Repayment Period - Purpose 4. Submit for approval

Loan Approval (HR/Admin): 1. Go to **Administration** → **Loan Management** 2. Review pending applications 3. Approve or reject with comments 4. Set repayment schedule

8.2 Loan Repayment

- Loans are automatically deducted from payroll
- View repayment schedule in loan details
- Track outstanding balance

---

9. Reports

9.1 Available Reports

Employee Reports: - Employee Master List - Headcount Report - Employee by Department - Staff Movement Report

Payroll Reports: - Payroll Summary - PAYE Report - SSNIT Report - Bank Advice - Payroll Master

Leave Reports: - Leave Balance Report - Leave History - Leave Summary by Type

Loan Reports: - Outstanding Loans - Loan Disbursement Report

9.2 Generating Reports

1. Navigate to **Reports**
2. Select report type
3. Apply filters:
4. Date range
5. Department
6. Employee category
7. Status
8. Click **Generate**
9. View on screen or export

9.3 Export Formats

Reports can be exported as: - **CSV:** For data analysis - **Excel:** For spreadsheets - **PDF:** For printing/sharing

9.4 Payroll Reconciliation

Compare payroll between periods:

1. Go to **Reports** → **Payroll Reconciliation**
2. Select:
3. Current Period
4. Previous Period
5. Click **Compare**
6. View variance analysis:
7. New employees
8. Exited employees
9. Salary changes
10. Allowance/deduction changes

10. Self-Service Portal

10.1 My Profile

View and update personal information: - Personal details - Contact information - Emergency contacts - Bank details - Profile photo

10.2 My Leave

- View leave balances
- Apply for leave
- Track application status
- View leave history

10.3 My Appraisal

- View current appraisal
- Set and track goals
- Complete self-assessment
- View past appraisals

10.4 My Payslips

- View monthly payslips
- Download payslip PDFs
- View payment history

---

11. Administration

11.1 Data Import

Import bulk employee data:

1. Go to **Administration** → **Data Import**
2. Download template
3. Fill in employee data
4. Upload file (CSV/Excel)
5. Map columns to fields

6. Validate data
7. Execute import

Supported Import Types: - Employee Master Data - Salary Information - Bank Details - Leave Balances

11.2 Organization Setup

Divisions: - Create organizational divisions - Set division heads

Directorates: - Create directorates under divisions - Assign directors

Departments: - Create departments under directorates - Assign department heads

Job Positions: - Define job titles - Set position grades

Job Grades: - Define grade levels - Set salary bands

11.3 Payroll Setup

Banks: - Add banks for salary payments - Configure bank codes

Staff Categories: - Define employee categories - Set category-specific rules

Salary Bands & Levels: - Configure salary structures - Define pay grades

Transaction Types: - Create allowance types - Create deduction types - Set calculation rules

Tax Configuration: - Configure PAYE rates - Set tax brackets - Configure relief amounts

11.4 Leave Setup

Leave Types: - Create leave types - Set entitlement rules - Configure accrual methods - Set approval workflows

Leave Calendar: - Define public holidays - Set organization calendar

11.5 Performance Setup

Appraisal Cycles: - Create annual cycles - Set phase dates - Configure weights

Competencies: - Define core competencies - Set proficiency levels - Assign to grades

Core Values: - Define organization values - Set behavioral indicators

12. Troubleshooting

12.1 Common Issues

Cannot Login: - Verify email address is correct - Check password (case-sensitive) - Clear browser cache - Try password reset

Page Not Loading: - Check internet connection - Refresh the page - Clear browser cache - Try a different browser

Data Not Saving: - Check required fields - Verify data format - Check for error messages - Contact support if persists

Report Generation Fails: - Reduce date range - Apply more filters - Try different export format - Contact support for large reports

12.2 Getting Help

In-App Help: - Click the help icon (?) on any page - View contextual help content

Contact Support: - Email: support@yourorganization.com - Phone: +233 XX XXX XXXX - Hours: Monday-Friday, 8:00 AM - 5:00 PM

12.3 Keyboard Shortcuts

Shortcut	Action
`Ctrl + /`	Open search
`Esc`	Close modal/dialog
`Enter`	Submit form

Appendix

A. Glossary

Term	Definition
PAYE	Pay As You Earn - Income tax deducted at source

Term	Definition
SSNIT	Social Security and National Insurance Trust
TIN	Tax Identification Number
Gross Pay	Total earnings before deductions
Net Pay	Take-home pay after all deductions
Appraisal Cycle	Annual performance review period
Probation	Trial period for new employees

B. Status Codes

Employee Status: - ACTIVE - Currently employed - PROBATION - Under probation - ON_LEAVE - On approved leave - SUSPENDED - Temporarily suspended - TERMINATED - Employment ended

Leave Status: - PENDING - Awaiting approval - APPROVED - Leave granted - REJECTED - Leave denied - CANCELLED - Leave cancelled

Payroll Status: - OPEN - Ready for processing - PROCESSING - Being computed - COMPUTED - Calculation complete - APPROVED - Ready for payment - PAID - Payment done - CLOSED - Period closed

---

This manual is subject to updates as the system evolves. For the latest version, contact your HR department.