NHIA HRMS User Manual

NHIA Human Resource Management System (HRMS)

User Manual

Table of Contents

NHIA Human Resource Management System (HRMS)

User Manual

Version 1.0 | February 2026

Table of Contents

---

1. Getting Started

1.1 About NHIA HRMS

The NHIA Human Resource Management System (HRMS) is a comprehensive web-based platform for managing all aspects of human resources, payroll, leave, benefits, performance, and recruitment. The system serves both employees (self-service) and HR administrators.

1.2 System Access

Access the system through your web browser at the provided URL. The system supports the following authentication methods:

- **Email/Password** - Standard login with email and password
- **Active Directory (LDAP)** - Login using your organizational AD credentials
- **Microsoft Azure AD** - Single sign-on via Microsoft account

1.3 User Roles

- **Employee** - Access to self-service portal (profile, leave, payslips, benefits)
- **Manager/Supervisor** - Employee access plus leave approvals for direct reports
- **HR Administrator** - Full access to HR management, payroll, and administration

- **System Administrator** - Full access including system configuration and user management

---

2. Authentication & Account Setup

2.1 Login

1. Navigate to the login page
2. If multiple authentication providers are configured, select your preferred method:
    - **Email** - Enter your email address and password
    - **Active Directory** - Enter your AD username and password
    - **Microsoft** - Click “Sign in with Microsoft” to authenticate via Azure AD
3. Click **Sign In**

Two-Factor Authentication (2FA)

If 2FA is enabled on your account, after entering your credentials you will be prompted to:

1. Enter the **6-digit verification code** sent to your email, SMS, or from your authenticator app
2. Alternatively, click **“Use backup code”** to enter an 8-digit backup code
3. Click **Verify**

For email/SMS methods, you can click **“Resend code”** if you didn’t receive it (30-second cooldown between resends).

2.2 Employee Self-Registration

New employees can register their own accounts:

1. Click **“New employee? Sign up here”** on the login page
2. **Step 1 - Identify**: Enter your email address and either your Employee Number or Ghana Card Number
3. **Step 2 - Verify**: Check your email for a verification link (valid for 24 hours)
4. **Step 3 - Password**: Click the email link, then set your password (minimum 8 characters)
5. You will be redirected to the onboarding wizard

2.3 Onboarding Wizard

After registration, complete the 4-step onboarding:

1. **Verify Info** - Confirm your contact details (mobile phone, personal email, residential address, city)
2. **Emergency Contact** - Add an emergency contact (name, relationship, phone numbers, email)
3. **Photo Upload** - Upload a profile photo (recommended: square, minimum 200x200px)
4. **Complete** - Welcome screen with link to your dashboard

All steps can be skipped and completed later from your profile settings.

2.4 Forgot Password

1. Click **“Forgot password?”** on the login page
2. Enter your registered email address
3. Click **Send Reset Link**
4. Check your email for the reset link (expires in 1 hour)
5. Click the link and enter your new password with confirmation

---

3. Dashboard

The dashboard provides an at-a-glance overview of key HR metrics. It is available to HR administrators and managers.

3.1 Summary Cards

Four key metrics are displayed prominently at the top:

- **Total Employees** - Current employee count with new hires this month
- **Pending Leave** - Number of leave requests awaiting approval
- **On Leave Today** - Employees currently on leave
- **Active Loans** - Number of active loan accounts

Each card is clickable and navigates to the relevant management page.

3.2 Payroll Summary Banner

Displays the latest payroll run information:

- Period name and status
- Total employees processed
- Total gross pay, deductions, and net pay
- **View Details** button links to payroll processing

3.3 Charts & Analytics

- **Employees by Department** - Pie chart showing headcount distribution
- **Employment Status** - Pie chart of employee statuses (Active, Probation, etc.)
- **Gender Distribution** - Progress bars showing male/female ratio

- **Payroll Trends** - 6-month line chart of gross vs. net pay
- **Leave Overview** - Pending approvals, approved today, on leave today, upcoming
- **Appraisal Completion** - Gauge showing appraisal cycle progress

3.4 HR Highlights

- Employees on probation
- Pending confirmations
- Birthdays this month

3.5 Quick Actions

Four shortcut buttons for common tasks:

- **Add Employee** - Navigate to new employee form
- **Process Payroll** - Navigate to payroll processing
- **Leave Approvals** - Navigate to pending leave approvals
- **View Reports** - Navigate to reports page

3.6 Attention Required

Alerts for items needing action:

- Pending leave requests requiring approval
- Probation confirmations due
- Payroll runs in progress or pending

The dashboard auto-refreshes every 30 seconds to show the latest data.

---

4. Self-Service Portal

4.1 My Profile

Access from the sidebar under **Self Service > My Profile**.

Tabs:

- **Personal Info** - View and edit personal details, contact information, addresses
- **Employment** - View employment details, dates, organization placement
- **Bank Details** - View and manage bank account information
- **Emergency Contacts** - View and manage emergency contact details

Editing Your Profile:

1. Navigate to the relevant tab
2. Click the **Edit** button
3. Make your changes
4. Click **Save Changes**

Some fields may require HR approval through a Data Update Request.

4.2 Data Update Requests

Access from **Self Service > Data Updates**.

For fields that require HR approval:

1. Click **New Request**
2. Select the field you want to update
3. Enter the new value
4. Submit the request

5. Track the status (Pending, Approved, Rejected)

4.3 My Payslips

Access from **Self Service > Payroll** or from the Payroll page.

View your payslip history with expandable details:

1. Click on any payroll period to expand the payslip
2. View breakdown of:
    - **Earnings** - Basic salary and all allowances
    - **Deductions** - PAYE tax, SSNIT, and other deductions
    - **Summary** - Gross pay, total deductions, and net pay
3. Click **Download PDF** to save a copy of your payslip

---

5. Employee Management

5.1 Employee Directory

Access from **HR > Employees**.

Search & Filter

- **Search bar** - Search by name, employee ID, or email
- **Filters** (expandable panel):
    - Department
    - Employment Status (Active, Probation, On Leave, Suspended, etc.)
    - Job Grade
- Click **Clear Filters** to reset

Employee Table

Displays: Employee name/photo, Department, Position, Grade, Status, Hire Date

- Click any row to view the employee's full profile
- **Export** button to download employee data
- **Add Employee** button to create a new employee record

5.2 Employee Detail Page

Click on any employee to view their complete profile.

Tabs:

Personal Info - Basic information (title, names, DOB, age, gender, marital status, nationality) - Contact information (emails, phone numbers) - Address information (residential, city, region, district, digital address) - National IDs (Ghana Card, SSNIT, TIN, Voter ID, Passport) - Bank details (primary and all accounts) - Medical information

Employment - Employment details (status, type, assignment) - Key dates (joining, confirmation, probation, contract dates, retirement) - Organization (division, directorate, department, cost center, location) - Position and grade information - Supervisor details - Salary structure (band, level, notch)

Education - Education history with degree, institution, and year information

Documents - Uploaded documents with download capability

Salary - Summary bar showing: Band, Level, Notch, Notch Amount, Bank, Account, Branch - **Payroll History** - Collapsible list of payslips with: - Period name, status, gross/deductions/net summary - Expanded view: earnings breakdown, deductions breakdown, employer contributions, bank details - If no payslips exist, shows basic salary, total allowances, and gross salary cards

Leave - Leave balance cards with progress bars (Days Left, Days Taken / Entitled) - Leave history table (Type, Period, Days, Status, Reason)

Transactions - Employee transactions table showing all earnings/deductions - Add transaction capability - Approve, reject, suspend, reactivate actions per transaction

5.3 Adding a New Employee

Click **Add Employee** from the Employee Directory.

9-Section Form:

1. **Personal Info** - Title, names, DOB, gender, marital status, nationality
2. **IDs & Documents** - Ghana Card, SSNIT, TIN, Voter ID, Passport, legacy IDs
3. **Contact** - Personal/work email, phone numbers
4. **Address** - Residential address, city, region, district, digital/postal address
5. **Employment** - Employment type, status, assignment status, key dates
6. **Organization** - Division, directorate, department, position, grade, location, supervisor
7. **Salary** - Staff category, salary notch (filtered by grade/category), shows band/level/amount
8. **Medical** - Blood group, medical conditions, disability information
9. **Bank & Notes** - Bank, branch, account details, general notes

Navigate between sections using **Previous** / **Next** buttons. Click **Save** when complete.

5.4 Editing an Employee

1. Open the employee’s detail page
2. Click the **Edit** button
3. The same 9-section form opens pre-populated with existing data
4. Make your changes and click **Save**

---

6. Leave Management

6.1 Self-Service Leave

Access from **Self Service > My Leave**.

Applying for Leave

1. Click **Apply for Leave**
2. Select the **Leave Type** from the dropdown
3. Choose **Start Date** and **End Date**
4. Enter a **Reason** (optional)
5. Click **Submit Request**

Leave Balances

View your leave balances as cards showing: - Leave type name - Available days remaining (prominently displayed) - Days taken out of total entitled - Visual progress bar

Attaching Documents

For leave requests that require supporting documents (e.g., medical certificates):

1. Open the leave request by clicking **View**
2. In the Supporting Documents section, select the **Document Type** (Medical, Proof, Other)
3. Click **Attach** and select your file
4. Supported formats: PDF, DOC, DOCX, JPG, JPEG, PNG, GIF (max 10MB)
5. Documents can be downloaded or deleted while the request is in Draft or Pending status

Leave Calendar

Access from **Self Service > My Leave > Calendar** for a visual calendar view of your leave.

Leave Planning

Access from **Self Service > My Leave > Planning** to plan future leave as drafts before submitting.

6.2 Leave Approvals (Managers/HR)

Access from **HR > Leave Approvals**.

Approving Leave

1. View the list of pending leave requests
2. Click **View** (eye icon) to see full details
3. Click the **Approve** (checkmark) button to approve, or
4. Click the **Reject** (X) button, enter a rejection reason, and confirm

Filtering

Use the status dropdown to filter: All Requests, Pending, Approved, Rejected.

6.3 Leave Type Setup (Admin)

Access from **Administration > Leave Types**.

Creating a Leave Type

1. Click **Add Leave Type**
2. Optionally select a **Quick Start Template** (Annual, Sick, Maternity, Paternity, Compassionate, Study, Unpaid)
3. Configure across 4 tabs:
    - **Basic Info** - Code, name, description, entitlement days, paid/unpaid toggle
    - **Accrual & Carry Forward** - Accrual method (monthly/quarterly/yearly), carry forward rules, encashment settings
    - **Rules & Restrictions** - Approval requirements, document requirements, eligibility criteria, advance notice
    - **Display Settings** - Color code for calendar display, sort order
4. Click **Save**

---

7. Payroll Management

7.1 Payroll Processing

Access from **Payroll > Process Payroll**.

Creating a Payroll Run

1. Click **New Payroll Run**

2. Select an open payroll period
3. Click **Create Run**

Processing Workflow

Each payroll run follows a 4-step workflow shown as a visual progress stepper:

Step 1: DRAFT - Review the run details - Click **Compute Payroll** to calculate all salaries - A progress modal shows real-time computation progress (employee by employee)

Step 2: COMPUTED - Review computed results: employee count, total gross, deductions, net pay, PAYE tax - Additional details: SSNIT contributions, Tier 2 contributions, employer cost - Options: - **Approve Payroll** - Advance to approval - **Recompute** - Recalculate if changes were made - **Reset to Draft** - Go back to draft status

Step 3: APPROVED - Final review before payment - Click **Process Payment** to mark as paid

Step 4: PAID - Payroll is finalized - Generate **Bank Files** (CSV for bank transfers) - Generate **Payslips** (PDF for all employees) - **Close Period** to lock the period

Bank Files & Payslips

After a payroll run reaches COMPUTED, APPROVED, or PAID status: - Click **Bank Files** to generate CSV files grouped by bank for electronic payment processing - Click **Payslips** to generate downloadable PDF payslips for all employees

7.2 Payroll Period Setup

Access from **Payroll > Period Setup** or **Payroll > Payroll Setup > Settings tab**.

Active Period Management

- View the current active payroll period
- **Advance to Next Month** to move to the next period
- Use the calendar dropdown or quick-select to change the active period

Period Operations

- **Close Period** - Lock a PAID period to prevent further changes
- **Reopen Period** - Unlock a CLOSED period (only available from Period Setup, not from Payroll Processing)
- **Create Year** - Generate 12 monthly periods for a given year

Automatic Period Status Updates

Period status is automatically synchronized when payroll actions occur: - Computing payroll sets the period to COMPUTED - Approving payroll sets the period to APPROVED - Processing payment sets the period to PAID - Rejecting payroll reverts the period to OPEN

7.3 Backpay / Retroactive Pay

Access from **Payroll > Backpay**.

Overview

The Backpay page manages retroactive pay adjustments when salary changes, promotions, or transactions are backdated to periods that have already been paid.

Creating Backpay Requests

Single Request: 1. Click **New Request** 2. Select the employee, reason, effective dates, and optional reference period 3. Click **Create Request**

Bulk / All Staff: 1. Click **Bulk / All Staff** 2. Either check “All Active Employees” or select filters (division, directorate, department, grade, region, district, location, staff category) 3. Set reason, effective dates, and description 4. Click **Create Bulk Requests**

Automatic Detection: 1. Click **Detect Retropay** to scan for backdated changes made during the current payroll processing window 2. The system detects: - Salary revisions effective in past paid periods - Promotions or grade changes effective in past paid periods - Transaction changes effective in past paid periods 3. Review detected employees in the results modal 4. Click **Create All** to generate DRAFT backpay requests for all detected employees

Processing Backpay

Individual Processing: - Click the calculator icon on a DRAFT request to calculate arrears - Review the period-by-period breakdown showing old vs. new amounts - Click the checkmark icon to approve the request

Bulk Processing: 1. Click **Process All** to start batch processing 2. The system calculates all DRAFT requests, then auto-approves those with arrears > 0 3. Monitor progress via the animated progress bar showing: processed count, percentage, current employee

Bulk Approval: - Click **Approve All** to approve all PREVIEWED requests with net arrears > 0

Backpay Status Flow

DRAFT > PREVIEWED (calculated) > APPROVED > APPLIED (included in next payroll)

Viewing Details

Click the eye icon on any request to see: - Employee information and reason - Financial summary (earnings arrears, deductions arrears, net arrears) - Period-by-period breakdown table with component-level detail

Cleanup

- **Delete by Period** - Remove all DRAFT and CANCELLED requests for a selected period
- Individual delete/cancel actions available per request

7.4 Payroll Setup

Access from **Payroll > Payroll Setup**.

Tabs:

Settings - Active period management and payroll period configuration

Banks - Manage bank master data (code, name, SWIFT code, status)

Branches - Manage bank branches filtered by bank (code, name, city, sort code)

Staff Categories - Define staff categories with payroll groups and default salary bands

Salary Bands - Define salary bands with min/max salary ranges

Salary Levels - Define levels within bands with salary ranges

Salary Notches - Define specific salary points within levels with fixed amounts

Each tab supports full CRUD (Create, Read, Update, Delete) operations with pagination.

7.5 Transaction Types (Pay Components)

Access from **Payroll > Transaction Types**.

Overview

Transaction types define the earnings, deductions, and employer contributions used in payroll calculations.

Creating a Pay Component

1. Click **Add Transaction Type**
2. Fill in basic info: Code, Name, Short Name, Description
3. Select Type (Earning, Deduction, Employer Contribution) and Category (Basic, Allowance, Bonus, Statutory, Overtime, Shift, Loan, Fund, Other)
4. Choose calculation method:
    - **Fixed Amount** - A set monetary value
    - **Percentage** - Percentage of basic or gross salary with optional min/max caps
    - **Loan Deduction** - Configure principal, interest rate, term, and calculation method
    - **Overtime** - Set rate multiplier and standard hours
    - **Custom Formula** - Write a formula using variables (basic, gross) and functions (min, max, round, abs)
5. Test your formula with sample salary data before saving
6. Set flags: taxable, statutory, recurring, prorated, show on payslip, requires approval
7. Click **Save**

Filtering

Filter by Component Type, Category, and Status (Active/Inactive).

7.6 Employee Transactions

Access from **Payroll > Employee Transactions**.

Overview

Employee transactions are individual earnings or deductions applied to employees, grades, or salary bands.

Creating Transactions

1. Click **New Transaction**
2. Select target type:
    - **Individual Employee** - Apply to one or multiple selected employees
    - **Job Grade** - Apply to all employees in a grade
    - **Salary Band** - Apply to all employees in a band
3. Select the transaction type (pay component)
4. Choose value: Use Default, Fixed Amount, Custom Percentage, or Custom Formula
5. Set effective dates (from/to)
6. Toggle recurring if applicable
7. Click **Create**

Tabs

- **All** - All transactions with count
- **Pending Approval** - Awaiting approval
- **Active Recurring** - Currently active recurring transactions
- **One-Time** - Non-recurring transactions

Filters

Filter by Status, Transaction Type, Target Type, Department, or search by employee name.

Actions

- **Approve** / **Reject** individual or bulk-selected pending transactions
- **Suspend** active transactions
- **Reactivate** suspended transactions

7.7 Tax Configuration

Access from **Payroll > Tax Configuration**.

PAYE Tax Brackets

Configure Ghana’s progressive income tax brackets: - Click **Load Ghana 2024 Rates** to auto-populate standard brackets - Or manually add brackets with: name, income range, tax rate, effective date - Brackets automatically calculate cumulative tax

Overtime & Bonus Tax

Configure overtime and bonus taxation rules: - Qualifying Employment Income threshold - Overtime tax rates (below/above threshold) - Bonus tax rates and PAYE excess rules - Non-resident tax rates

Tax Calculator

Use the built-in calculator to test tax computations: 1. Click **Tax Calculator** 2. Enter overtime amount, bonus amount, monthly basic salary, and annual salary 3. Toggle resident/non-resident 4. Click **Calculate Tax** to see the breakdown

7.8 Payroll Implementation

Access from **Payroll > Payroll Implementation**.

This is a one-time setup wizard for initializing the payroll system from Excel files.

Steps:

1. **Upload Files** - Upload the NHIA Staff Allowances file and Staff Data file (.xlsx format)
2. **Review Analysis** - Review detected pay components, employee records, tax brackets, and SSNIT rates
3. **Processing** - Watch 5 phases execute with real-time progress:
    - Update employee data (grades, NIA numbers, bank accounts)
    - Seed payroll configuration (tax brackets, SSNIT rates)
    - Create pay components (earnings and deductions)
    - Create employee salaries from notch amounts
    - Create transactions (grade-based and individual)
4. **Complete** - Review results summary and navigate to next steps

---

8. Benefits & Loans

Access from **Self Service > Benefits & Loans**.

8.1 Loans

Applying for a Loan

1. Go to the **Loans** tab
2. Click **Apply for Loan**
3. Select the **Loan Type** (shows interest rate information)

4. Enter the **Amount Requested**
5. Set the **Repayment Period** in months (constrained by loan type limits)
6. Enter the **Purpose**
7. Click **Submit Application**

Loan Summary

View summary cards showing: - Total Borrowed - Outstanding Balance - Monthly Deduction

My Loans Table

View all loans with: Type, Amount/Balance, Interest Rate, Monthly Payment, Status.

8.2 Loan Management (Admin)

Access from **Administration > Loan Management**.

Managing Loans

- View all loan applications with summary dashboard (Total Loans, Pending, Disbursed, Outstanding)
- **Approve** pending loans (generates repayment schedule)
- **Reject** loans with a mandatory reason
- **Disburse** approved loans to activate repayment
- Filter by status: Draft, Pending, Approved, Rejected, Disbursed, Active, Completed

Loan Status Flow

DRAFT > PENDING > APPROVED > DISBURSED > ACTIVE (Repaying) > COMPLETED

8.3 Benefit Claims

Go to the **Benefits** tab to submit general benefit claims:

1. Click **New Claim**
2. Select the Benefit Type
3. Enter the Amount
4. Add a Description
5. Click **Submit Claim**

8.4 NHIA Benefits

Go to the **NHIA Benefits** tab for organization-specific benefits:

Funeral Grants

- View eligibility for 5 beneficiary types (Employee, Spouse, Parent, Spouse’s Parent, Child)
- Each type shows the grant amount and remaining claims
- Submit claims with: Grant Type, Deceased Name, Relationship, Date of Death

Medical Lens Benefit

- View eligibility status, maximum amount, and eligibility period
- Submit claims with: Expense Date, Amount, Optical Provider, Description
- Claims are only allowed when eligible (based on eligibility period)

Professional Subscriptions

- View subscription types with maximum annual amounts
- Submit claims with: Subscription Type, Professional Body, Membership Number, Period, Amount

8.5 Third-Party Deductions

Go to the **Third-Party** tab to view deductions managed by external organizations: - View-only table showing Organization, Type, Amount/Percentage, Outstanding Balance, Status

---

9. Performance Management

9.1 Appraisal Cycles

Access from **Administration > Appraisal Cycles**.

Create and manage appraisal cycles with start/end dates and participant groups.

9.2 Appraisals

Access from **Administration > Appraisals**.

Overview

View all appraisals filtered by cycle, status, and department.

Summary Cards

- Total Appraisals, Completed, Pending, Average Rating

Creating an Appraisal

1. Click **Create Appraisal**
2. Select the Appraisal Cycle (active cycles indicated)
3. Select the Employee
4. Click **Create**

Appraisal Detail

Click on an appraisal to view/edit: - Employee information - Self-assessment sections - Supervisor assessment - Competency ratings - Goal setting and review - Overall rating - Comments and feedback

9.3 Competencies & Core Values

Access from **Administration > Competencies** and **Administration > Core Values**.

Define organizational competencies and core values used in appraisal assessments with rating scales.

9.4 Probation Assessments

Access from **Administration > Probation Assessments**.

Manage probation reviews with assessment tracking and confirmation/extension/termination workflows.

9.5 Training Needs

Access from **Administration > Training Needs**.

Identify training needs from performance reviews, manage training requests, and plan training programs.

9.6 Performance Appeals

Access from **Administration > Performance Appeals**.

Handle employee appeals against performance ratings through a structured review and resolution process.

---

10. Recruitment

Access from **HR > Recruitment**.

10.1 Vacancies

Creating a Vacancy

1. Click **Create Vacancy**
2. Fill in: Job title, department, position, requirements, qualifications
3. Set shortlisting criteria
4. Set application deadline and number of positions
5. Publish the vacancy

Managing Vacancies

View vacancies with: Reference Number, Title, Department, Status, Applications count, Closing Date.

Statuses: DRAFT, OPEN, ON HOLD, CLOSED, FILLED, CANCELLED.

10.2 Applicants

Track applications through the recruitment pipeline:

- View all applicants with: Application Number, Name, Position, Status, Applied Date, Score
- Statuses: NEW, SCREENING, SHORTLISTED, INTERVIEW, OFFER, HIRED, REJECTED, WITHDRAWN

Auto-Shortlisting

The system can automatically shortlist candidates based on predefined criteria set during vacancy creation.

10.3 Interviews

Schedule and manage interviews:

- View: Candidate, Position, Interview Type, Date/Time, Status, Panel Members
- Statuses: SCHEDULED, COMPLETED, NO SHOW, RESCHEDULED

---

11. Reports

Access from **Reports**.

11.1 Quick Access Reports

Four dedicated report pages accessible from the top of the Reports page:

- **Payroll Journal** - GL journal entries for payroll posting
- **Salary Reconciliation** - Compare salaries across periods
- **Period Reconciliation** - Compare two payroll periods side by side
- **Payroll Master** - Detailed payroll breakdown by employee

11.2 Standard Reports

Select from the report list on the left panel:

Report	Description
Employee Master Report	Complete employee data export
Headcount Report	Employee count by various dimensions
Payroll Summary	Period payroll totals
Payroll Master Report	Detailed per-employee payroll data
PAYE Tax Report	Income tax computation details
PAYE GRA Schedule	Ghana Revenue Authority submission format
SSNIT Contribution Report	Social security contributions

Report	Description
Bank Advice Report	Bank payment instructions
Employee Payslips	Bulk payslip generation (ZIP download)
Bank Payment File	Electronic payment file for banks
Leave Balance Report	Employee leave balances
Outstanding Loans Report	Active loan balances

11.3 Report Filters

Each report has contextual filters:

- Employee Code
- Division / Directorate / Department (hierarchical)
- Position, Grade, Staff Category
- Salary Band / Level
- Bank, Employment Status
- Payroll Period, Month, Year
- Date ranges

Active filter count is displayed. Click **Clear All** to reset filters.

11.4 Export Formats

Reports can be exported in three formats:

- **CSV** - Text format for data analysis
- **Excel** - Spreadsheet format with formatting
- **PDF** - Print-ready format

Click the desired format button to generate and download the report.

---

12. Administration

12.1 Organization Setup

Access from **Administration > HR Setup**.

Tabs:

Divisions - Top-level organizational units (Code, Name, Short Name, Description)

Directorates - Mid-level units linked to divisions (Code, Name, Division)

Departments - Team-level units linked to directorates (Code, Name, Directorate, Parent Department)

Job Positions - Employee positions linked to departments and grades (Code, Title, Department, Grade)

Job Grades - Salary grades with level ordering and salary structure links (Code, Name, Level, Salary Band, Salary Level, Salary Range)

Each entity supports Create, Edit, and Delete operations.

12.2 User Management

Access from **Administration > User Management**.

Summary Cards

Total Users, Active Users, Admin Users, Inactive Users.

Managing Users

- **Create User** - Set name, email, password, active status, admin access

- **Edit User** - Update user details
- **Manage Roles** - Assign or remove roles with scope (global, department, region, team)
- **Reset Password** - Send password reset email
- **Unlock Account** - Unlock accounts locked after failed login attempts
- **Delete User** - Remove user account (not available for superusers)

User Details

View comprehensive user information: profile, contact, status, 2FA status, linked employee, assigned roles, login history.

12.3 Role Management

Access from **Administration > Roles**.

Managing Roles

- **Create Role** - Name, code, description, level (hierarchy), optional district scope
- **Manage Permissions** - Assign permissions grouped by module with select all/deselect all capability
- System roles are protected and cannot be edited or deleted

12.4 Authentication Providers

Access from **Administration > Auth Providers**.

Configure authentication methods: - Local email/password - LDAP / Active Directory - Azure AD / Microsoft OAuth - Enable or disable providers

12.5 Data Import

Access from **Administration > Data Import**.

Single File Import

1. Select the target model (employees, departments, transactions, etc.)
2. Upload a CSV or Excel file (max 50MB, 10,000 records)
3. Map columns using AI-assisted or manual mapping
4. Preview validation results (valid/invalid record counts)
5. Execute the import with real-time progress tracking
6. Download error report if needed

Multi-File AI Import

1. Upload multiple files for batch processing
2. AI analyzes file types and suggests target models
3. Automatic dependency ordering
4. Execute batch import with per-file progress tracking

12.6 Data Analyzer

Access from **Administration > Data Analyzer**.

AI-powered tool for merging and analyzing data files:

1. Upload 2 or more CSV/Excel files (max 10MB each)
2. AI detects file structures and suggests joins
3. Configure join relationships between files
4. Preview merged data
5. Export results as CSV or Excel, or send directly to the import pipeline

12.7 Announcements

Access from **Administration > Announcements**.

- **Create** announcements with: Title, Summary, Content, Priority (Low/Normal/High/Urgent), Category
- **Pin** important announcements to the top
- **Require acknowledgement** from employees
- **Publish** / **Archive** announcements
- Track view counts and acknowledgement status
- Attach supporting documents

12.8 Policy Management

Access from **Administration > Policies**.

- **Create** policies of various types: Policy, SOP, Guideline, Manual, Circular, Memo
- Track versions and effective dates
- Require employee acknowledgement with completion tracking
- Publish, archive, or delete policies
- Filter by category, type, and status

12.9 Exit Management

Access from **HR > Exits**.

Creating an Exit Request

1. Click **New Exit Request**
2. Select the Employee and Exit Type
3. Set the Proposed Last Working Day
4. Enter the Reason for Exit and any additional comments
5. Submit the request

Exit Workflow

DRAFT > SUBMITTED > PENDING APPROVAL > APPROVED > CLEARANCE > COMPLETED

Track clearance progress and manage exit interviews.

---

13. System Settings

Access from the user menu or **Settings**.

13.1 Profile Settings

Update your first name, last name, email, phone number, and profile photo.

13.2 Password

Change your password. Requirements: - Minimum 8 characters - At least one uppercase letter - At least one lowercase letter - At least one number

13.3 Notifications

Toggle notification preferences:

Email Notifications: Leave Requests, Leave Status Updates, Payslip Notifications, Announcements

Push Notifications: Leave Requests, Approval Updates

13.4 Security

Two-Factor Authentication

Enabling 2FA: 1. Choose your preferred method: Email, SMS, or Authenticator App 2. Click **Enable Two-Factor Authentication** 3. For Authenticator App: Scan the QR code with your authenticator app 4. Enter the verification code 5. Save your 8 backup codes securely (click **Copy Codes** to copy all)

When 2FA is Active: - View your current method - **Regenerate Backup Codes** if needed - **Disable 2FA** (requires password; may be restricted by organization policy)

Active Sessions

View your current session and click **Log Out All Other Sessions** to secure your account.

Login History

Review recent login attempts with date, browser, and location information.

13.5 Organization Settings (Admin Only)

General: View organization name and country

Payroll Settings: Configure pay day and currency

Leave Settings: Set leave year start date and maximum carry forward days

2FA Policy: - Set enforcement level: Optional, Required for admins only, Required for all users - Choose allowed methods (Email, SMS, Authenticator App) - Set grace period for users to set up 2FA

NHIA HRMS User Manual v1.0 - February 2026

For technical support, contact your system administrator.