F2 Fintech EMS Documentation

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Dashboard Overview

The Dashboard serves as the central hub of F2 Fintech EMS, providing quick access to employee management, attendance, and other essential HR functionalities. It includes a welcome banner, employee recognition section, and a real-time weather update.

Employees Module

The Employees module allows you to manage employee records, including adding, editing, and viewing employee details.

Add an Employee

1. Click on the **Employees** option from the sidebar menu.
2. Click on the **Add Employee** button.
3. A dialog box will appear with the following fields:
    a. First Name
    b. Last Name
    c. Contact
    d. Email
    e. Work Email
    f. Date of Birth (DOB)
    g. Gender
    h. Password and Confirm Password
    i. Joining Date
    j. Status (Active/Inactive)
    k. Role
    l. Designation
    m. Employee Code
    n. Branch Selection
    o. Upload Image
4. Fill in the required details and click **Add Employee** to save the record.

Edit an Employee

1. On the Employees page, select the employee you want to edit.
2. Click on the **Edit** option from the action menu (three dots on the employee card).

3. Update the necessary information in the dialog box.
4. Click **Save** to update the employee details.

Holiday Management

Manage company holidays by adding, editing, and deleting holiday records.

Add a Holiday

1. Click on the **Holiday** option from the sidebar menu.
2. Click on the **Add New Holiday** button.
3. A dialog box will appear with the following fields:
    a. Title
    b. Opening Date
    c. Closing Date
    d. Day
    e. Note
4. Fill in the required details and click **Add Holiday** to save the record.

Edit a Holiday

1. On the Holiday Management page, locate the holiday you want to edit.
2. Click on the **Edit** button next to the holiday record.
3. Update the necessary information in the dialog box.
4. Click **Save** to update the holiday details.

Attendance Management

View Attendance

1. Attendance is displayed **branch-wise**, showing the number of employees who are present, absent, on leave, on field duty, or working from home.
2. Branches can be **added** in the **Settings** menu under the profile dropdown.
3. Attendance visualizes the **monthly attendance** of the first **10 employees**, with others accessible via pagination.

Add Attendance

1. Click on the **Attendance** option from the sidebar menu.
2. Click on the **Add Attendance** button.
3. A dialog box will appear with the following fields:
    a. Date
    b. Select Employee
    c. Status (Present, Absent, On Leave, etc.)
    d. Time Completion
4. Fill in the required details and click **Add Attendance** to save the record.

Edit Attendance

1. On the Attendance Management page, locate the employee whose attendance you want to edit.
2. Click on the attendance entry to open the edit dialog.
3. Update the necessary information.
4. Click **Save** to update the attendance record.

Leave Management

View Leave Requests

1. The **Leave Management** page displays all leave requests submitted by employees.
2. Each request contains details such as:
    a. Employee Name
    b. Leave Type (Casual, Sick, Unpaid, etc.)
    c. Start Date & End Date
    d. Application Reason
    e. Status (Pending, Approved, Rejected)
3. Admins can **search** for specific employees and filter leaves by month and year.

Update Leave Status

1. Admins **cannot** add leave requests, as employees are responsible for submitting their own leave requests.
2. To update a leave request:
    a. Click on the **Edit** button next to a leave entry.

   b. A dialog box appears with the following fields:
      i. Leave Type
      ii. Number of Days
      iii. Half-day Option (if applicable)
      iv. Reason for Approval/Rejection
      v. Status (Pending, Approved, Rejected)
   c. Update the necessary details.
   d. Click **Update Leave** to save changes.
3. Admins can also **delete** a leave request if necessary.

Teams Management

Add a Team

1. Click on the **Teams** option from the sidebar menu.
2. Click on the **Add Team** button.
3. A dialog box will appear with the following fields:
   a. Team Name
   b. Select Manager
   c. Select Employees
   d. Team Code
4. Fill in the required details and click **Add Team** to save the record.

Edit a Team

1. On the Teams Management page, locate the team you want to edit.
2. Click on the **Edit** button next to the team record.
3. Update the necessary information in the dialog box.
4. Click **Save** to update the team details.

Delete a Team

1. On the Teams Management page, locate the team you want to delete.
2. Click on the **Delete** button next to the team record.

Break Sheet

The **Break Sheet** allows employees to log and track their break times, including break start and end times, duration, and total on-site hours.

Punch In and Punch Out

1. **Punch In**: Employees can log their **start time** by clicking on the **Punch In** button.
2. **Punch Out**: Employees can log their **end time** by clicking on the **Punch Out** button.
3. The system tracks the total working hours for the day and displays them on the dashboard.

Time Summary

1. **On-Site Duration**: Displays the total time spent on-site for the day.
2. **Total Break Duration**: Tracks the total time spent on breaks.

Break Controls

1. **Choose Break Type**: Select the type of break (e.g., lunch, short break).
2. **Start Break**: Click the **Start Break** button to begin a break period.
3. **End Break**: Click the **End Break** button to log the end of the break and return to work.
4. Break duration is recorded for reference and tracking.

Fines Management

The **Fines Management** section allows admins to track and manage employee fines based on different reasons.

Add a Fine

1. Click on the **Fine** option from the sidebar menu.
2. Click on the **Add Fine** button.
3. A dialog box will appear with the following fields:
    a. **Search Employee**: Select the employee to whom the fine will be applied.
    b. **Fine Type**: Choose the reason for the fine (e.g., late punch-in).
    c. **Fine Amount**: Enter the fine amount.

    d. **Fine Date**: Select the date the fine was imposed.
4. After filling in the required fields, click **Create Fine** to save the record.

Edit a Fine

1. On the **Fines Management** page, locate the fine entry you want to edit.
2. Click on the **Edit** button next to the fine record.
3. Update the necessary information in the dialog box.
4. Click **Save** to update the fine details.

Delete a Fine

1. On the **Fines Management** page, locate the fine entry you want to delete.
2. Click on the **Delete** button next to the fine record.

Query Management

The **Query Management** section allows employees to raise and track queries, while administrators can assign and resolve them.

Create a New Query

1. Click on the **Query** option from the sidebar menu.
2. Click on the **Create New Query** button.
3. A dialog box will appear with the following fields:
    a. **Assigned To**: Select the employee to assign the query to.
    b. **Department**: Choose the department relevant to the query (e.g., HR, Sales).
    c. **Query Type**: Select the type of query (e.g., Break, HRMS, etc.).
    d. **Status**: Set the status of the query (e.g., Pending, Resolved).
    e. **Description**: Enter a description detailing the query.
4. After filling in the necessary details, click **Submit Query** to create the query.

Track and Resolve Queries

1. The **Queries** page displays all queries raised by employees, including details like:
    a. **Assigned By**: Who raised the query.
    b. **Directed To**: Who the query is assigned to.
    c. **Date Assigned**: When the query was created.

    d. **Current Status**: The current status of the query (e.g., Pending, Resolved).
    e. **Last Update**: When the query was last updated.
    f. **Type of Query**: The category of the query.
    g. **Query Details**: Description of the query.
2. Admins can **search** for specific queries, **filter** by status, and manage the resolution.

Edit a Query

1. To **edit** a query:
    a. Click on the **Edit** button next to the query.
    b. Update the necessary information in the dialog box.
    c. Click **Save** to update the query.

Assets Management

The **Assets Management** section allows tracking and management of company assets assigned to employees.

Assign an Asset

1. Click on the **Assets** option from the sidebar menu.
2. Click on the **Assign Asset** button.
3. A dialog box will appear with the following fields:
    a. **Select Employee**: Choose the employee to whom the asset will be assigned.
    b. **Select Asset**: Choose the asset being assigned (e.g., laptop, mobile).
    c. **Assignment Date**: Select the date the asset is assigned to the employee.
4. After filling in the required details, click **Add Asset** to save the record.

Edit an Asset

1. On the **Assets Management** page, locate the asset entry you want to edit.
2. Click on the **Edit** button next to the asset record.
3. Update the necessary information in the dialog box.
4. Click **Save** to update the asset details.

Seating Plan

The **Seating Plan** allows the visualization and management of workspace seating arrangements for employees.

View Seating Layout

1. The layout shows **available** and **booked** seats in the office.
2. Each seat is marked with the following colors:
    a. **Green**: Available seat
    b. **Red**: Booked seat
    c. **Blue**: Reserved seat for specific departments or roles
3. **Reserved seats** (e.g., Reception, Directors, Conference) are also displayed separately for easier management.

Edit Seat Assignment

1. Click on the **Seat Layout** option from the sidebar menu.
2. Click on the **Edit** button next to the employee's seat assignment.
3. Update the **Employee**, **Seat Number**, or **Assigned Date** as needed.
4. Click **Save** to update the seat assignment.

Add a New Spot

1. Click on the **Add Spot** button to add a new seating arrangement.
2. Select the **Employee**, **Seat**, and **Assignment Date**, then click **Save**.

Policy Management

The **Policy Management** section allows you to create, view, edit, and delete company policies.

View Policies

1. The **Policy Management** page displays a list of all company policies, each with a **Name**, **Description**, and the option to **Download** or **Edit**.

Add a New Policy

1. Click on the **Add Policy** button.
2. A dialog box will appear with the following fields:
    a. **Name**: Enter the name of the policy.
    b. **Description**: Provide a brief description of the policy.
    c. **Upload Document**: Attach any related document if necessary.
3. Click **Add Policy** to save the new policy.

Edit or Delete a Policy

1. To **edit** a policy, click the **Edit** button next to the policy.
2. To **delete** a policy, click the **Delete** button next to the policy and confirm the deletion.

Room Booking

The **Room Booking** section enables employees to reserve and manage meeting rooms along with their available time slots.

Add a Room

1. Click on the **Room Booking** option from the sidebar menu.
2. Click on the **Add Room** button.
3. A dialog box will appear with the following fields:
    a. **Room Name**: Enter the name of the room (e.g., Conference Room).
    b. **Capacity**: Specify the room's seating capacity.
4. Click **Add Room** to save the room.

Book a Slot

1. On the **Room Booking** page, select the room you want to book (e.g., Conference, HR, Director).
2. Click on the **Book Slot** button.
3. You can select an available time slot to book the room for meetings or other activities.
4. Once the slot is selected, you can **confirm the booking**.

View Room Bookings

1. The page will show the **current bookings** of each room, including the **time** and **details** of the event or meeting.
2. Admins can **edit** or **delete** bookings by clicking on the corresponding buttons next to the booking.