User Manual : Payroll Management System

Introduction:

The Payroll Management System is a mobile-friendly and web-compatible application designed to automate the complete payroll process. It streamlines the management of employee records, attendance tracking, leave request handling (with integrated leave policy), salary computation, payslip generation, and automatic emailing of payslips to employees.

User Roles & Access:

The system supports multiple user roles with specific dashboards and access permissions.

1. Admin:

- Add new employee with personal details, initial login credentials, contact information, joining date, financial details, assigns role, designation and supervisor.
- Can view, update or delete employee records.
- Generate monthly payroll and email payslips for all employees.
- Can Review and edit payroll of any employee.
- Can download their own payslips.
- Create and restore backup.
- Can view their personal profile.
- View all the logs and payslips, reimbursement proofs uploaded.
- Display all leave requests of managers and employees.
- Manage HR leave requests.
- Record their own attendance and update leave statuses.
- View attendance details for every manager and employee.
- View personal attendance history.

2. Manager:

- View employee details under their supervision.
- Can download their own payslips.

- Cannot generate or edit payroll.
- Can view their personal profile.
- Manage leave requests for assigned employees only.
- Submit their own leave requests—routed directly to the Admin dashboard—and track their status.
- Record their own attendance and view personal attendance history.

3. **Employee:**
   - Can view their personal profile.
   - Can download their own payslips.
   - No access to view or manage other employees.
   - Submit leave requests—reviewed exclusively by their assigned supervisor—and monitor request status.
   - Record attendance and view personal attendance history.

Pages & Functionalities:

- **Login Page:**
  - Purpose**:**Secure entry point to the system.
  - How to use:
    1. Enter valid email and password.
    2. Click "Login" button.
    3. On success, user is directed to their respective dashboard.
- **Dashboard:**
  - Purpose**:** overview screen with key features and navigation.
  - Quick links to core functions like Add New Employee, Payroll Management…
  - Profile icon with options like viewing profile and logout.
- **Add New Employee:**
  - Purpose: Add a new employee to the system.
  - How to use:
    1. Navigate to "Add New Employee".
    2. Fill in all details like name, DOB, email, password, designation, join date, etc.
    3. Click "Add" button.

iv. Employee is added and saved to the database.

- **View & Manage Employees:**
  - Purpose: View and manage existing employee records.
  - How to use:
    i. Navigate to “View & Manage Employee Details”.
    ii. Use search to locate specific employee.
    iii. View details or edit or delete an employee.

- **Generate Payroll & Email Payslip:**
  - Purpose: Generate monthly salary based on attendance, leaves, performance, reimbursement and email payslips.
  - How to use:
    i. Navigate to “Generate Payroll & Email”.
    ii. Select month and then it will show all the eligible employees.
    iii. Choose performance category for each employee.
    iv. Add reimbursement amount and upload proof (PDF) if applicable for each employee.
    v. Click “Generate payroll” button then you can see that Payroll generated and email payslips button activated.
    vi. Click “Email Payslips” button to send the payslips.

- **Review & Edit Payroll:**
  - Purpose: View and edit the generated payroll records.
  - How to use:
    i. Navigate to “Review & Edit Payroll”.
    ii. Use search to look for specific employee’s payroll record or month.
    iii. View all the generated payrolls.
    iv. Edit reimbursement amount or upload proof (if applicable).

- **Payslip Download:**
  - Purpose: Download their own payslips.
  - How to use:
    i. Navigate to “My Payslips”.
    ii. Can view all generated payroll records of their own.
    iii. Can download the payslip needed.

- **Leave Request Page:**

  Overview: Presents a summary of leave balances (e.g. annual, sick, unpaid).

  Request Workflow:

  1. Click **"Request Leave"** to open a modal form.
  2. Enter required details (leave type, start/end dates, reason).
  3. System validates against business rules (e.g. paid and sick leave cannot be combined; sandwich rule applied).
  4. Click **"Submit"** to send the request for approval.

  Automated Notes: Generates a contextual note explaining how the selected dates interact with policy constraints.

- **Leave Status Page:**

  Purpose: Displays a chronological list of all past and pending leave requests.

  Columns: Request date, leave type, duration, status (Pending/Approved/Rejected), approver comments.

- **Manage Attendance Page:**

  Check-In / Check-Out:

  - Buttons for **"Entry Time"** and **"Exit Time."**
  - On click, captures timestamp and geolocation.

  Location Accuracy:

  - Mobile devices (with built-in GPS) record precise coordinates.
  - Laptops provide approximate location only.

- **My Attendance Page:**

  Date Selection: Dropdowns for **Month** and **Year**.

  Attendance Display: Tabular view showing each day's check-in/out times, status

- **Manage Leave Requests Page (Manager):**

  Review Panel: Lists leave requests submitted by direct reports.

  Actions: Approve or reject each request, with an optional comment field.

  Status Update: Upon action, recorded in the Leave Status Page.

- **All Leave Requests Page (Admin):**

  Overview: Provides a centralized view of every leave request—both managers' and employees'—with the newest submissions displayed first.

  Request Details: For each entry, show employee name, role, leave type, date range, request date, status, and any approver comments.

  Filtering & Sorting:

    - **Date Range Filters**: Select start and end dates to narrow the listing.
    - **Status Filter**: Toggle between Pending, Approved, and Rejected.

- **Attendance List Page (Admin):**

  Overview: Displays attendance records for all staff—including managers and individual contributors—on a per-date basis.

  Date Selector: Pick a single date (or range) to load entries for that period.

  Attendance Details: For each person, show check-in time, check-out time, location stamp

- **Manage Attendance Page (Admin):**

  Records the Admin's l attendance.

  Updates leave status by category: Paid, Sick, Unpaid, and Other.

  Displays the Admin's available leave balances in real time.

- **Backup & Restore:**
  - Purpose: Allows admin to create and restore data backups.
  - How to use:

i. Navigate to “Backup & Restore”.
ii. To create a backup, click on 'Backup Database' — this will generate a full database dump.
iii. To restore a backup, click 'Restore from Backup' and select the file.

Logs and Media Storage:

The Payroll Management System securely stores important files and logs generated during application usage**.**

- **Logs:**
  - Purpose: Track important system operations performed by users such as payroll generation and updating, employee creation and updating.
  - Location: Payroll_Backend/media/employee_operations.log
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- **Reimbursement Proofs:**
  - Purpose: Store reimbursement proofs uploaded during payroll processing.
  - Location: Payroll_Backend/media/reimbursement_proofs/
- **Payslips:**
  - Purpose: Stores up-to-date payslips ofall employees for all months.
  - Location: Payroll_Backend/media/payslips
- **Payslips Archive:**
  - Purpose: Stores older version of payslips for the reference.
  - Location: Payroll_Backend/media/payslips_archive

All generated Logs, reimbursement proofs and payslips are stored in:
Payroll_Backend/media/ for ease of access.