CIT HRM

Version 0.1.0

CIT HRM

Leave & Timesheet Management

CABCS Group India Technologies Private Limited Bangalore, India

Modules

1. Admin Module

2. PIM - Personal Information Module

3. Leave Module

4. Time Module

5. Reports Module

6. Biometric Data Module

7. Payroll Module

8. News Module

Admin Module

The Admin Module provides you with full control of all settings that affect the action of your CIT HRM implementation. Through the Admin Module, you can:

- Define the Company Hierarchy, Projects, Customers, Qualifications etc.
- Add other administrators and set access levels for each user.
- Data importing and exporting.
- Enable/Disable Module display.

The Admin Module is the backbone of the system and setting it up accurately is important for smooth operation.

PIM - Personal Information Module

This module maintains all relevant employee related information. All information about an employee can be entered here. Information captured in this module is utilized by all other modules, thus eliminating data redundancy. The PIM Module will be available to the admin with full control and supervisors with restricted access showing his subordinates.

Leave Module

The Leave Module automates the HR administrative tasks of recording leave and controlling these against leave policies defined in the HR system. The module provides flexibility in allowing you to define various types of Leave, including Annual Leave, Sick Leave, Travel leave etc. The Leave Module can send notifications to their Managers and allows you to record, track leave and view leave history. The web-enabled and self-service concepts significantly streamline all leave related procedures, eliminate paperwork, and saves costs

Time Module

Business-critical operations require reliable tracking and control to maximize profits and reduce operational costs. A time management tool is one of the vital employee work time management features that make the entire difference between successful HR-Management and a weak one. The Time module automates the time tracking process. While allowing the employee to define and submit their time sheets the Managers can approve/reject or even modify them. The employee will enter the punch in/out time hence allowing attendance monitoring. The Time module can track time spent on specific projects while project managers can define projects.

Report Module

Easy to use standalone reports can be generated to meet your needs. Any module reports can be downloaded by filtering the contents.

Biometric Module

This module is used to add daily Punched IN/OUT details of employees. Admin only have access to this Module and can import Punched IN/OUT records as Excel file.

Payroll Module

The Payroll module manages the processing of employee compensation and the generation of various analyses and documents. Admin can upload Payslips of all employees and employees can download their own Payslips.

News Module

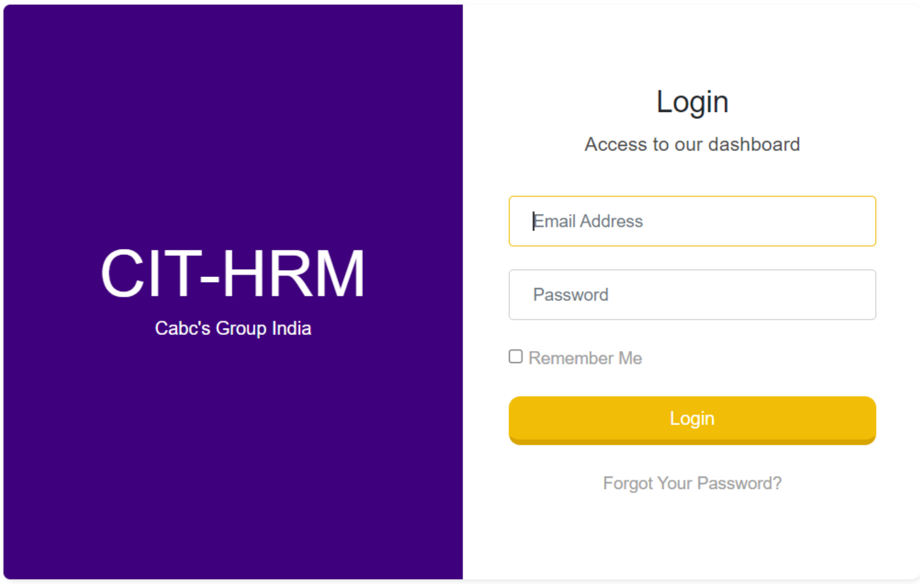
This Module have different news or events that can organized in Organization. Such details can be added in News Module and same will be shown on Dashboard of all the employees.

Login , Log Out & Changing your Password

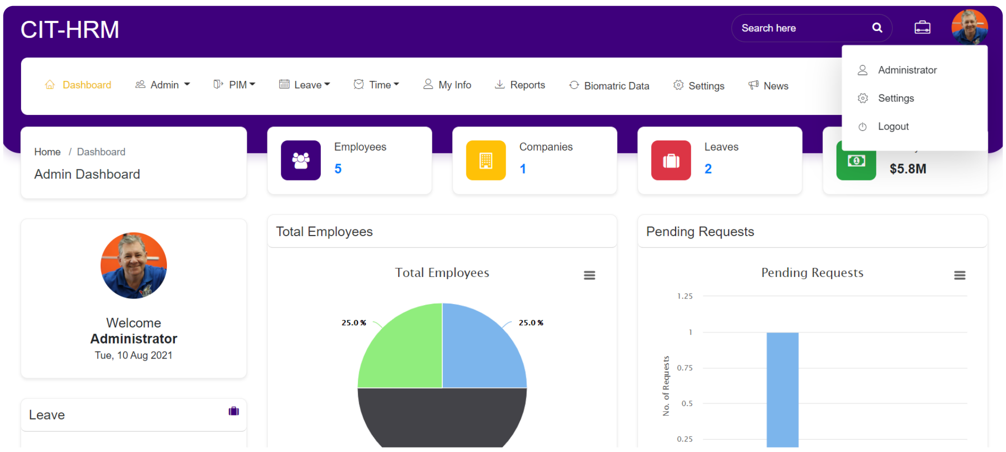
Open your browser and enter the URL for

<< Add URL here >>

Login



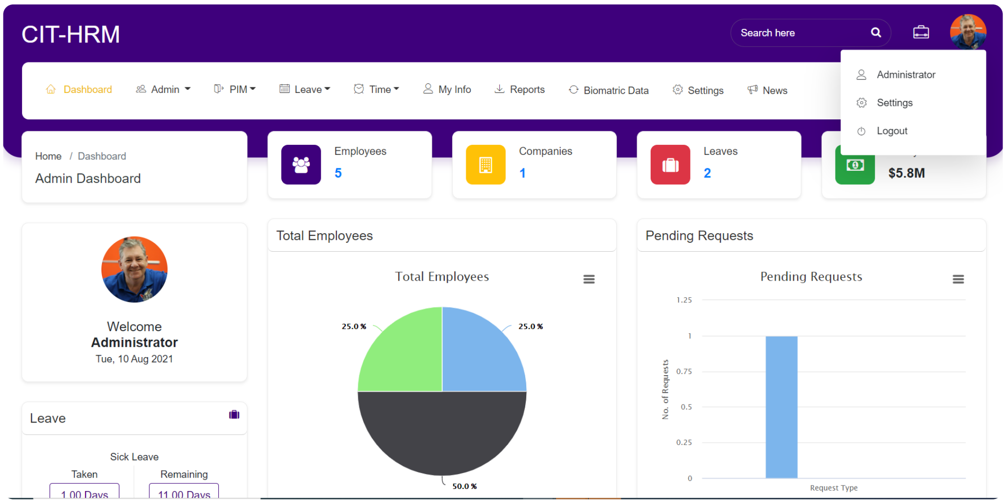
Change Password



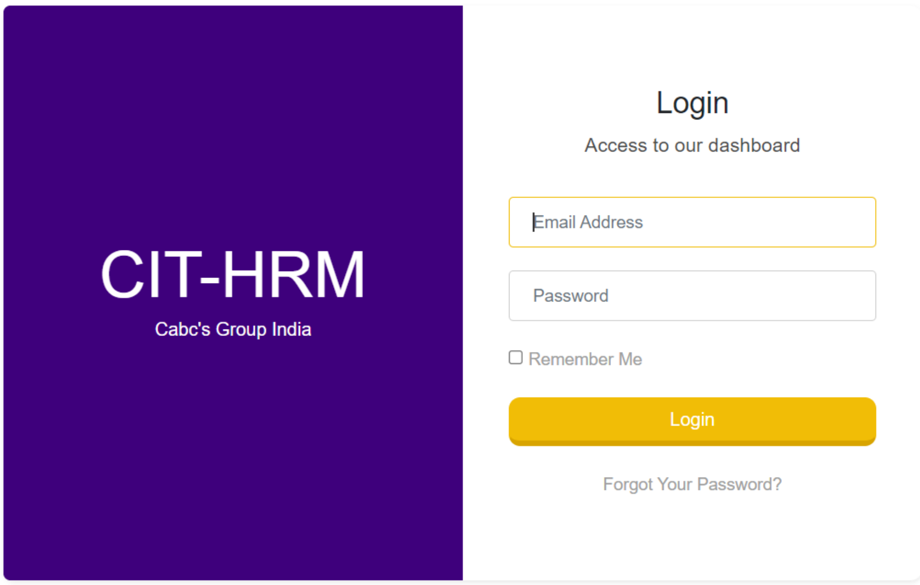
Click on the UsernameàChange Password in the admin dashboard.

Enter the Current Password and enter the new Password along with confirm new password and click on save to save the new password. .. figure:: images/ChangePassword02.png

Logout



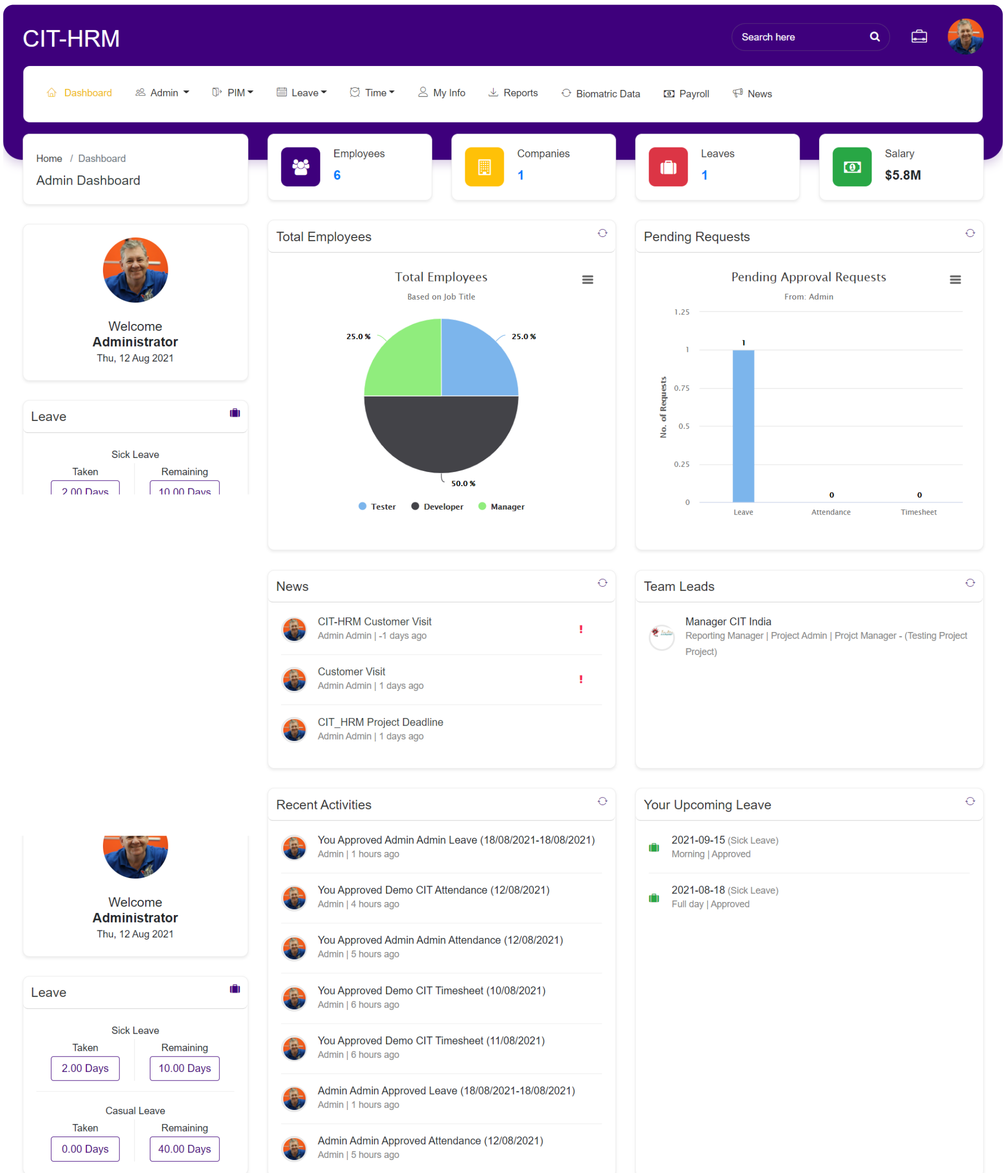
Forgot Password



If Employee forgot his password, then he can request for reset password by clocking on link “Forgot Your Password?” on Login page.

Dashboard

Click on "Dashboard", It shows all Modules link in Nav Bar. Displays employees count, Companies count, Leaves Count of Logged in User. It also displays Total employees based on Job title in Pie chart and Pending leave requests in Bar chart. Dashboard also shows some fields like News Section, Team Leads Section, Recent Activities Section and Your Upcoming Leaves Section. All data displayed in this section is dynamic and displayed for time period or up to some status change. It also shows logged in user's Leave data at left side.



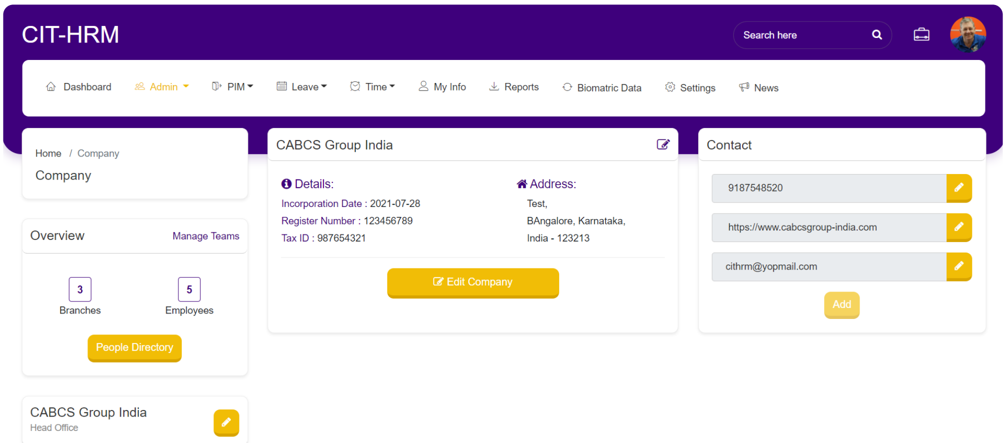
Admin Module

The Admin Module, the main point of control for the whole system. All administrative tasks such as configuring job titles, creating user accounts and many other system management tasks are performed on the Admin Module.

Organization

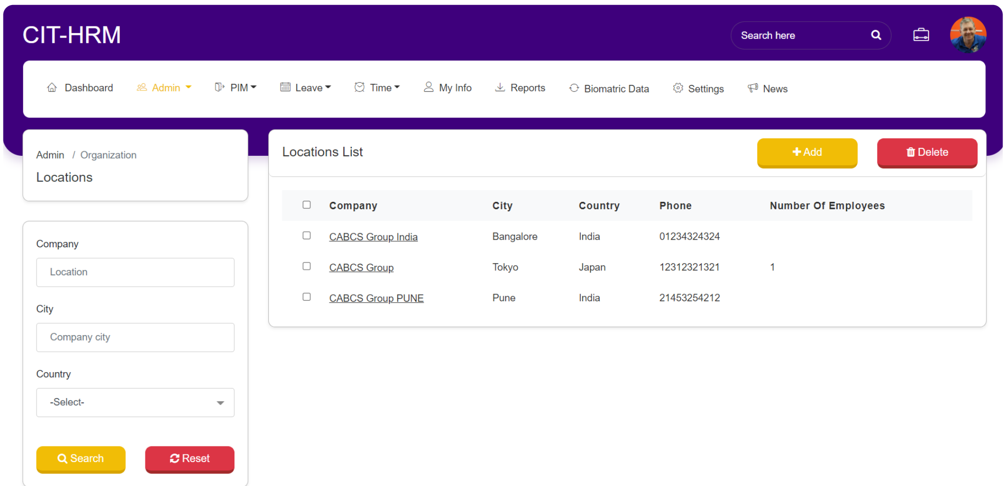
General Information

Click on Organization → "General Information" and click on edit to add the company details including company name, address, phone numbers, and Registration number.

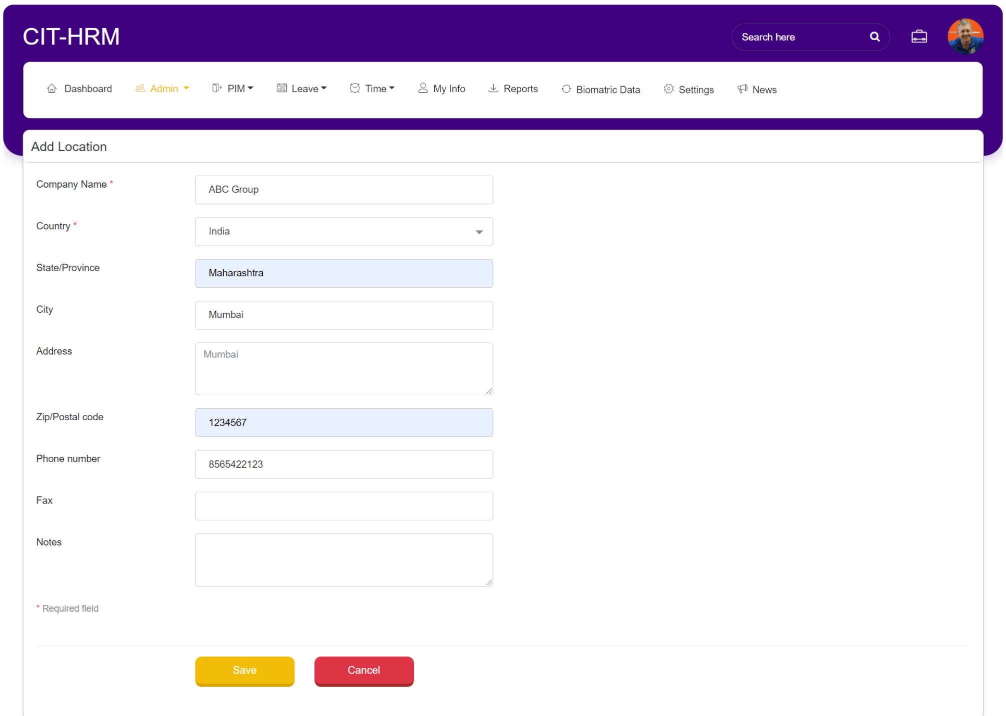


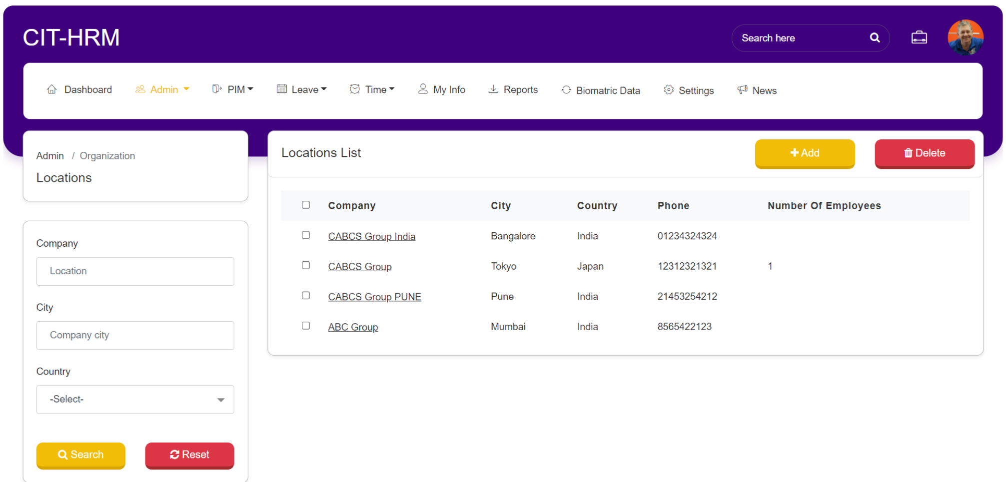
Locations

Click on Organizationà"Locations" to add the Organization locations.



Click on “ADD” button to add the Location and enter all details and click on Save.

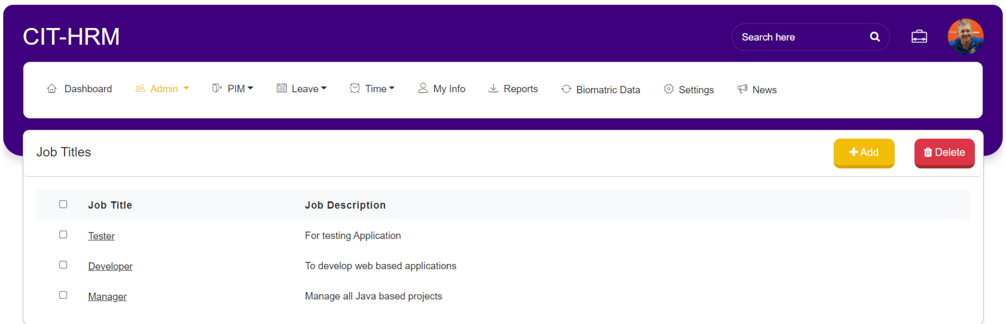




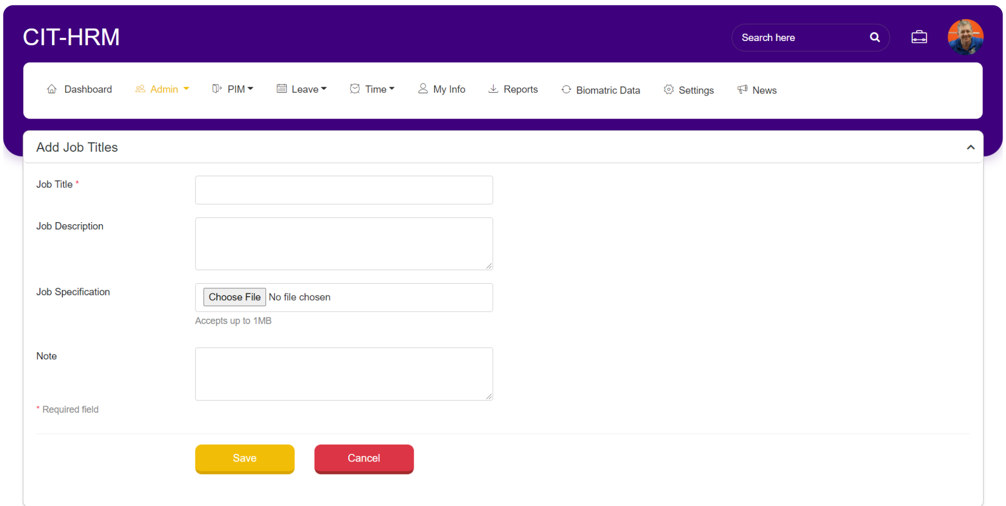
Job

Job Title

Click on Job → "Job" Titles to add the new titles for the employee.

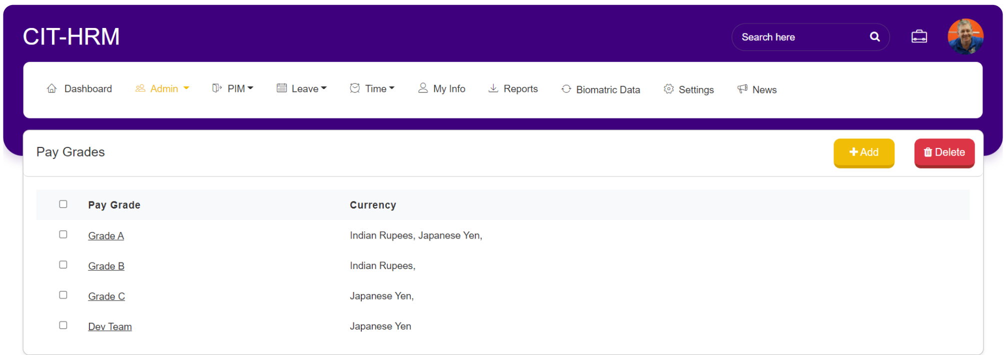


Click on "ADD" button to add new Job Title. Enter Job title, Job description, Job specification, attachment if available, Note and click on save button.

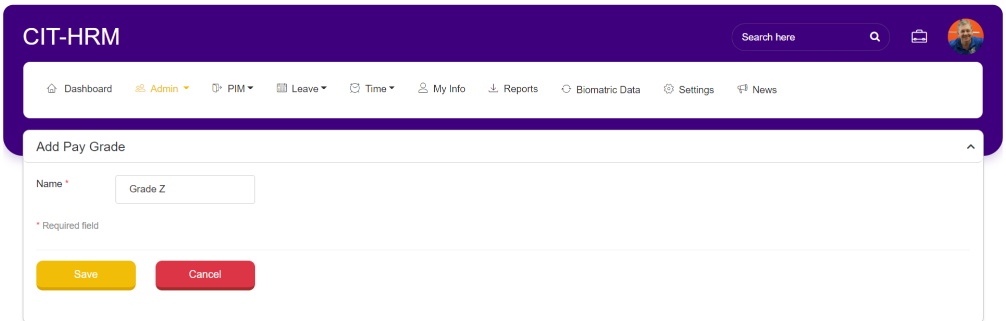


Pay Grades

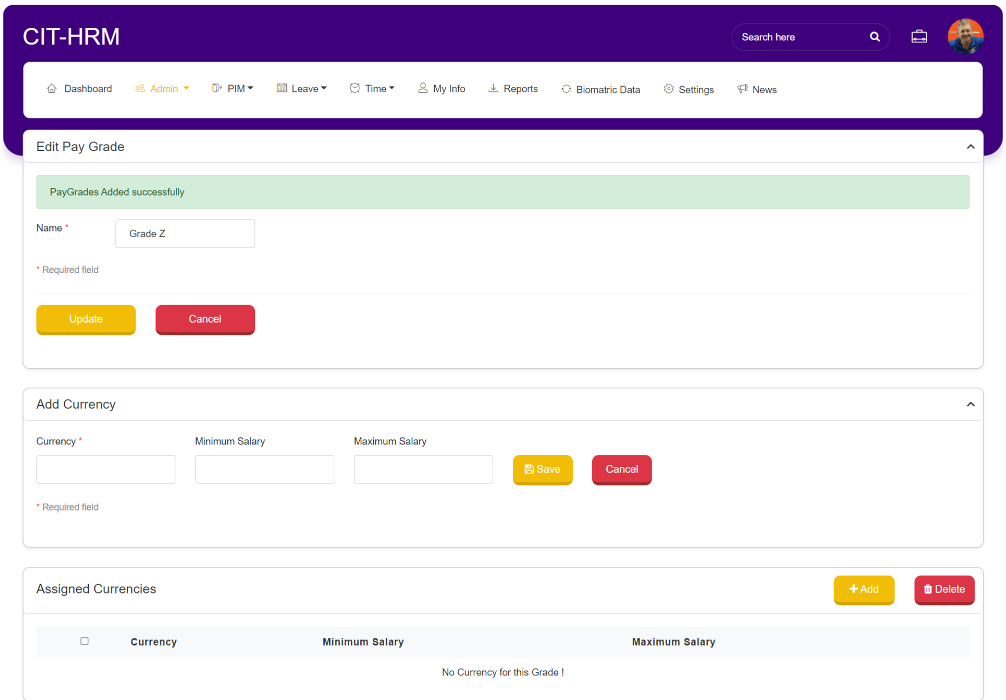
Select Job → "Pay Grades" to check available Pay Grade if any or add new Pay Grade.



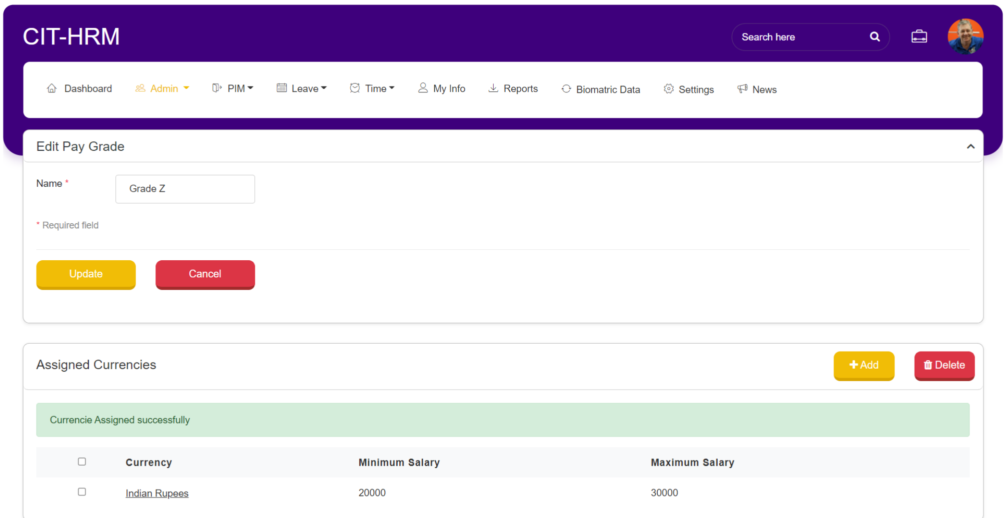
Click on “ADD” button to add new Pay Grades. Name and click on Save button



After clicking Save button, “Assigned Currencies” tab will be enabled. Click on “ADD” button to assign currency to added grade.



Enter Currency, Minimum Salary and Maximum Salary and Click on "Save" button.



Job categories

Select Job → "Job Categories" to add new Job Categories or list existing Job Categories if any. .. figure:: images/job-categories-1.png

Click "Add" button, enter the Category name and click on Save button to add the new job category to the organization. .. figure:: images/job-categories-2.png

User Management

In this Sub-Module, Admin will assign role to the added employee in PIM Module. Select Admin >> click on “User Management” to check the list of added employees. .. figure:: images/user-management-1.png

Click on “ADD” or “Username” to assign role. Employee’s been added in PIM Module, will be listed here for role allocation like Employee, Manager or Admin. While creating new Employee in PIM module, Login credentials can be created. If not created, then while assigning role Login credentials for that employee can be create. If credentials care created while Employee creation, then by mistake if Admin again creates while assigning role then previous credentials will be overwritten. .. figure:: images/add-user-1.png Single employee or multiple employees can be deleted by selecting check box and click on “Delete ” button. .. figure:: images/user-management-2.png Employee details can be searched by Employee Name or Role or Status. .. figure:: images/user-management-1.png

Qualification

Skills

Select Admin >> Qualification >> “Skills” to add new skill or list existing skills if any. .. figure:: images/skills-1.png

Click “ADD” button to add new Skill. Enter Skill and description then click on “Save” button. .. figure:: images/skills-2.png

Skills can be deleted by checking check box and click on “Delete” button.

Punch IN/OUT Configuration

In this Sub-module, Admin can give access to employees for some modules if needed. Like , if attendance data is missing for some employee or for all employees then admin can enable that configuration then only Employees can see that menu. .. figure:: images/punk-in-out-1.png

PIM

Employee List

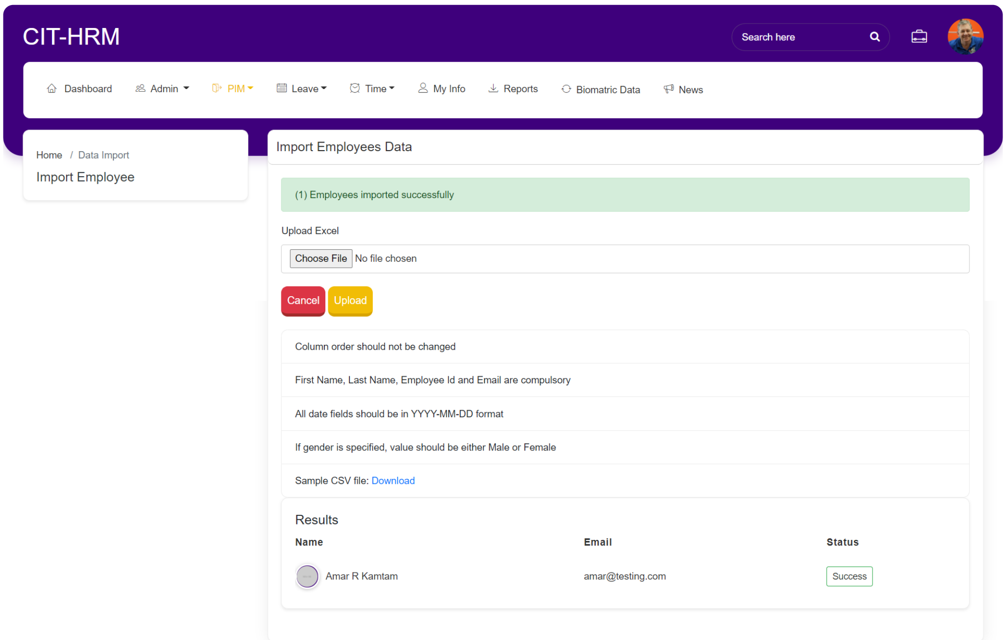
Click on PIM >> “Employee List”. Once the employee is added the employee’s details will be displayed in the list. .. figure:: images/employee-list-1.png Click on the “ADD” button to add new Employee. Click on the checkbox next to the id to delete the employee from the employee list. Single and multiple deletion can be done by checking the check box. Employee can be filter by using search section at left side. .. figure:: images/employee-list-2.png

Add Employee

Click on PIM → ”Add Employee” to add the new employee to the organization. Click on the Create Login details check box and add the username, password and confirm password to create the login credentials to the employee created and click on Save button to add the employee to the organization. Add all details related to Job and Contact To and Report To. .. figure:: images/add-employee.png

Data import

Click on PIM >> “Data import” to add multiple employee details through excel file. The sample excel file link has been given on screen. Upload File and click on “Upload” button to upload the Employees. Sample File: .. figure:: images/Data-import-1.png .. figure:: images/Data-import-2.png Uploaded details will be displayed below.


CIT-HRM
Search here
Dashboard
Admin
PIM
Leave
Time
My Info
Reports
Biomatric Data
News
Home / Data Import
Import Employee
Import Employees Data
(1) Employees imported successfully
Upload Excel
Choose File No file chosen
Cancel
Upload
Column order should not be changed
First Name, Last Name, Employee Id and Email are compulsory
All date fields should be in YYYY-MM-DD format
If gender is specified, value should be either Male or Female
Sample CSV file: Download
Results
Name
Email
Status
Amar R Kamtam
amar@testing.com
Success

Leave Module

Apply Leave

Click on Leave → “Apply Leave” to apply leave. At left side, balance leave details will be shown. Select Leave type, From-To Date, Duration, enter Reason and click on “Apply” button to send leave request. <=image=> Note : If Admin applies leave, then it will be auto approved. When manager applies, then it will go for Admin approval. And when Employee applies, then if Manger is assigned to that employee, then request will go to Manager for approval and once, he approves then it will go for Admin approval. If Manager is not assigned, then request directly goes for Admin approval.

My Leave

Click on Leave → “My Leave”, shows list of leave records applied by logged in employee. <=image=>

Entitlements

The Entitlements can be configured here, to Configure the Entitlements, the Leave Type and Leave period is mandatory to be added.

Add Entitlements

Once the employee is created, click on Leave →Entitlements→”Add Entitlement” to assign max allotted leave for an employee in a year. Select Employee, Leave Type, Leave period will be displayed automatically from Leave period, enter Entitlements e.g. number of leave to above leave type. Then click on “Save” button to save the entitlement for that employee for the given period. Entitlement can be assigned to multiple employees by selecting the checkbox of “Add to Multiple Employees”. By selecting check box, shows two dropdown fields of “location” and “Sub-unit”. So for that Location and Sub-unit Entitlements will be assigned.

Without selecting “Add to Multiple Employees” >> <=image=> Selecting “Add to Multiple Employees” >> <=image=>

Employee Entitlements

Click on Leave → Entitlements → “Employee Entitlements” to check the entitlements of employees. Here it will list out the entitlements added to employees. <=image=> Click on “ADD” button will be navigated to “Add Entitlements” screen. <=image=> Single or multiple entitlements can be deleted by selecting check box and click on “Delete” button. <=image=> Employees details can be filtered by Employee Name, Leave Period and Leave Type. <=image=>

My Entitlements

Click on Leave → Entitlements → “My Entitlements”, shows current logged in employees entitlement details. Click on “ADD” button will navigate to “Add Entitlements” screen. <=image=>

Single or multiple entitlements can be deleted by selecting check box and click on “Delete” button. <=image=>

Configuration

Leave Period

Click on Leave → Configuration → “Leave Period“ to set the Leave Period for the Organization Select Month, Date and End date is calculated automatically. Current Leave period will be displayed below. <=image=>

Leave Type

Click on Leave→Configuration→”Leave Types” to add Leave Types. Click on “ADD” button, Enter Name & click on save button to save the new leave type to the organization.

<=image=> <=image=> Click the checkbox and then click “Delete” button to delete the leave type.

Holidays

Click Leave→Configuration→”Holidays” to add new Holiday and check list of holidays. Click “ADD” button to add new Holiday to organization. Enter the Holiday Name, date, and click the checkbox Repeats annually if the holiday is mentioning is constant for all years (e.g.: Dec 25th, Jan 1st… etc.) also select full day / half day the holiday is valid and click save button to add the holiday to organization. Click the checkbox and then click “Delete” button to delete the leave type.

<=image=> <=image=>

Leave list

Click on Leave →"Leave List" to check the employee leave status. Leave applied by the employee will be listed here for Approval process. Leave has two levels of approval. If Employees has assigned Manager, then first Leave request will be sent to manager for approval. If Manager approves then it will be sent for Admin approval. If Manager Rejects or Cancels, then request will be sent back to Employees with Manager's comments. If Employee is not assigned Manager, then Leave request directly sent for Admin Approval. Leave request can be filter by using search section at the left side. <=image=>

Assign Leave

Click on Leave → "Assign Leave", Admin or Manager can apply leave on behalf of Employee. Select Employee Name, Leave Type, From-To Date, Duration, and Enter Reason then click on "Apply" button to send Leave request. If Manager applies Leave request on behalf of Employee, then it will be sent to Admin approval. And If Admin applies Leave request on behalf of Employee, then it will be auto approved. <=images=>

Time Module

Timesheets

The employee time sheets can be configured here, to Configure the time sheet the Project info and customer info is mandatory to be added.

My Timesheets

Click Time→ Timesheets →”My Timesheets” to Create timesheets and submit for approval. By default, “Daily” tab will be set.

<=image=>

Click on “ADD” button to add timesheet for that day. It will open Timesheet create screen.

<=image=>

Select Project Name, Activity Name, Enter Duration, write Comments and if worked on multiple project or multiple tasks then click on “Add Row” to add those details. Then click on “Save” button to save the timesheet. <=image=>

Once Timesheet is saved, by default it will be in “Not Submitted” state. Employees can submit for approval by clicking “Submit” button and it will be sent for approval. For Timesheet, one level of approval is needed. If Employee is assigned with Manager, then request needs to be approved by Manager. If not, then request should be approved by Admin. If Admin creates Timesheet and click on “Submit” button to send for approval, then it will be auto approved.

<=image=>

Timesheet can be deleted if the status is “Not Submitted” by clicking “Delete” Button.

Employee Timesheets

Click Time→ Timesheets →”Employee Timesheets” to view timesheets submitted by the employee. List can display based on selection of “Daily/Weekly/Monthly” at right side. Admin can perform action on it like Approve/Reject/Cancel.

<=image=> Admin Approves Request >>

<=image=>

Attendance

Employees daily attendance data will be configured here.

My Records

Click on Time → Attendance → “My Records”, lists attendance details here. In “My records” data will be added from “Biometric Module” and “Punch IN/OUT” screen will be shown here. If Records are added from “Biometric Data” then it will be listed with Type as “Automatic” and if listed from “Punch IN/OUT” then it will be listed as Type “Manual”.

<=image=>

Data can be filtered from filter section by selecting Date field and click on “Search” button.

Punch IN/OUT

If Punch IN/OUT details are not present in “Biometric Data” then Admin can enable this module for Employees to manually enter the Punch IN/OUT details and will be sent for one level of approval. Admin can have full access so he can see this menu all the time. Click Time à Attendance à “Punch IN/OUT” to enter punch In/Out details manually. Select Date, enter Time and Note and then click on “Punch In” button. Once “Punch In” button is clicked then “Punch Out” Screen will be displayed. <=image=> Click on “Punch In” to save details. <=image=> Enter Punch OUT details and click on “Punch OUT” button. And details are listed in My records screen. <=image=> Click on “Punch Out” button to save details and navigates to My Records page. If Admin creates attendance record, then it will be auto approved. If Manager creates, then it will be sent for Admin approval. If Employee creates, then it will be sent for Manager approval. If Manager is not assigned, then request sent to Admin approval.

Employee Records

Click on Time à Attendance à “Employee Record”, lists Punch IN/OUT records submitted by the Manager or Employees. Admin can perform Approval operation here. If Employee or Manager sent Attendance record for approval, then default status will be “Submitted” in Admin panel. <=image=> Here Admin can perform Approval operation e.g. Approve or Reject. <=image=> Request can be filter or searched by Date.

Project Info

Customers

Click on Time à Project Info à “Customers” to view the existing customer list. Click on “ADD” button and enter the Name and Description and click on “Save” button to add the new Customer to the organization. <=image=> <=image=> Single or multiple Customers can be deleted by selecting check box and click on “Delete” button. <=image=>

Projects

Click on Time àProject Info à”Projects” to view the existing projects list. <=image=> Click on “ADD” button and enter the Customer’s Name, Project Name, Project Admin, Project Manager’s, Project Employees and Description and click on “Save” button to add the new project to the organization. <=image=> After Adding Project, Project Activities can be added on click of “Project” on Project list screen. It will open Project Edit Screen and below that Prokject Activities can be added. <=image=> <=image=> Click on “ADD” button to add project Activities. Enter the Activity and click on “Save” button. And it will be listed in Activities Section. Activity can be deleted by clicking on “Delete” button.

<=image=> Single or multiple Projects can be deleted by selecting check box and click on “Delete” button. <=image=>

My Info

Click on “My Info”, shows details of Logged in Employee/Manager/Admin. Admin has all access to change any all-fields data, Manager has limited access and whereas Employee also limited access to update few his personal details. <=image=>

Reports

Employee Report

Click on Reports, select “Employee Report” from the Report dropdown and click on “Apply Filter” button to see the Report details on search result section. Employee Report can be downloaded based on filtering details like Job Title, From-To Date and Status.

<=image=>

Report can be download as Excel file. <=image=>

Leave Report

Click on Reports, select “Leave Report” from the Report dropdown and click on “Apply Filter” button to see the Report details on search result section. Leave Report can be downloaded based on filtering details like Employee, Leave Status, Leave Type, From Date, To Date.

<=image=> Report can be downloaded as Excel file. <=image=> ————————— Attendance Report ————————— Click on Reports, select “Attendance Report” from the Report dropdown and click on “Apply Filter” button to see the Report details on search result section.

Attendance Report can be downloaded based on filtering details like Employee, From Date, To Date and Type. <=image=> Report can be downloaded as Excel file. <=image=>

Timesheet Report

Click on Reports, select “Timesheet Report” from the Report dropdown and click on “Apply Filter” button to see the Report details on search result section. Timesheet Report can be downloaded based on filtering details like Employee, Job Title, Project, From Date and To Date.

<=image=> Report can be downloaded as Excel file. <=image=>

Productivity Report

Click on Reports, select “Productivity Report” from the Report dropdown and click on “Apply Filter” button to see the Report details on search result section. Productivity Report can be downloaded based on filtering details like Project, From Date and To Date.

<=image=> Report can be downloaded as Excel file. <=image=>

Leave Balance Report

Click on Reports, select “Leave balance Report” from the Report dropdown and click on “Apply Filter” button to see the Report details on search result section. Leave Balance Report can be downloaded based on filtering details like Employee, Leave Type and Leave Period. <=image=> Report can be downloaded as Excel file. <=image=>

Biometric Data

Click “Biometric Data”, to upload Employees daily Punched IN/OUT details from biometric machine as Excel file. The sample excel file has been attached on “Biometric Data” screen. Successfully uploaded details are display below after uploading and similarly failed details also been displayed.

<=image=>

Uploaded sample details >>

<=image=>

News

Click “News”, To add news which will be shown on dashboard. Based on the selection of Project it will be displayed to Employees. If selected Project, then it will be shown for Admin and Project employees only. If Project is selected as ALL, then it will be shown for all employees.

<=image=>

Adding Sample news, Project as ALL >> Click on “ADD” button to add new News. Enter Title, Details, select Category, select Project, select Status and click on “Save” button to add news to dashboard. If the Status is “in-active” then it won’t be visible on dashboard.

<=image=>

Click on “Save” button.

<=image=> <=image=>

Payroll

In Payroll Module, Admin will upload all employee Payslips and employees can download own Payslips. Note: PDF file name must in below format, <<Employee ID>>-<<Month>>-<<Year>>.pdf e.g., 12000000-Jan-2021.pdf Click on “Payroll”, to view previously added payroll data.

<=image=>

Click on “Add” button to add new Pay slip. Enter Employee Name, select Month, Upload Pay slip, write comment if any and click on “Save” button to add.

<=image=>

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