

HR MODULE MONTHLY ATTENDANCE PROCESS

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I. Document Revision

Date	Version Number	Document Changes
23/03/2023	1.0	Initial Draft, Functional Document

II. Distribution List

Version	Date	Name	Role	Distribution Purpose
1.0	21/03/2023	Paulami Paul	BA	Doc Owner
1.0	21/03/2023	Prashanth R	Project Manager	Reviewer
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1.0	21/03/2023	Adam Abbas	Implementation Lead	Implementation

PURPOSE : -

To access monthly attendance management screen so that HR can keep a track of employee attendance records and take necessary actions accordingly. Monthly attendance records typically include the number of days or hours an employee was present and absent during a given month. This information is important for calculating payroll and tracking employee performance.

THE PROCESS INVOLVED

Once the HR log into the screen he/she should be directed to the attendance management screen where he/she can view the attendance records of all employees for the selected month. The attendance management screen should display the following information for each employee -

- Employee ID
- Employee name
- Total working days in selected month
- Total absent days in the selected month
- Total late entries in the selected month
- Total half-day leaves taken in the selected month
- Total full-day leaves taken in the selected month

The HR should be able to filter the attendance records based on the department, location, or designation of the employees . This will help them to analyze the attendance data of a particular group of employees.

Additionally he/she should be able to export the attendance records in CSV or Excel format. This will help them to generate reports and share them with the higher management. If any employee has low attendance record, the system should highlight it with a warning symbol.

SCREEN DESCRIPTION

- **Employee Details :** The screen should display the name , employee ID , department and other relevant details of the employee. Employee details typically include basic information such as the employee's name, contact information, job title, and employment status. Additional details may include the employee's start date, department, supervisor, and salary or hourly rate.
- **Attendance summary:** The screen should display an overview of each employee's attendance for the month, including the total number of days worked, absences, late arrivals, early departures, and any other relevant information. To create an attendance summary, you will need to compile the attendance data for each employee for the given month and calculate the relevant metrics such as total working days, total absences, and total present days. A column that displays the attendance status for each employee for each day of the month. This may include categories such as "present," "absent," "late," "early departure," or "leave."

- **Leave details:** The screen should display information about each employee's leave taken during the month, including the type of leave (e.g., sick leave, vacation leave, etc.), the number of days taken, and any remaining balance. The leave details typically include the type of leave taken, such as annual leave, sick leave, or unpaid leave, as well as the number of days or hours of leave taken during the month. This information is used to calculate the employee's pay, taking into account any deductions or adjustments that may be required based on the type of leave taken. To track the leave details of an employee in monthly attendance, you will need to keep a record of the employee's leave requests and approvals for the given month.
- **Leave requests:** A section that allows employees to request leave for specific dates and types of leave.

HOW TO CALCULATE THE LEAVE DETAILS

- **Determine the employee's leave entitlement:** Before calculating leave details, you need to determine the employee's entitlement for each type of leave. This may be based on their length of service, job classification, or other factors.
 - **Record leave requests:** Keep a record of all leave requests made by the employee during the period, including the type of leave requested, the dates of the requested leave, and any relevant notes or approvals.
 - **Calculate the number of leave days taken:** Using the information recorded in step 2, calculate the number of days or hours of leave taken by the employee during the period for each type of leave. For example, if the employee took three days of annual leave and two days of sick leave during the period, the leave details for that employee would be three days of annual leave and two days of sick leave.
 - **Update the employee's leave balance:** After calculating the leave details, update the employee's leave balance for each type of leave to reflect the days or hours taken. This will ensure that the employee's entitlements are accurate and up to date.
 - **Use the leave details to calculate pay:** Finally, use the leave details to calculate the employee's pay for the period, taking into account any adjustments or deductions required for the type of leave taken. This will ensure that the employee is paid accurately for the hours worked and the leave taken during the period.
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- **Overtime details:** The screen should display information about any overtime worked by employees during the month, including the number of hours worked and any associated pay.
 - **Exceptional cases:** The screen should be able to highlight exceptional cases such as overtime, leaves, late arrivals or early departures, sick days taken, etc.
 - **Export data:** The screen should be able to export the attendance data to an excel sheet for further analysis.
 - **Access control:** The screen should have access control based on the user's role to protect sensitive data.
 - **Alerts and notifications:** The screen should be able to provide alerts and notifications to HR managers for any irregularities in attendance, such as excessive absences, late arrivals, or early departures.
 - **Attendance trends:** The screen should be able to show attendance trends over time, enabling HR managers to identify any patterns or issues that may need to be addressed.

- **Integration with payroll:** The screen should be able to integrate with the payroll system to calculate employee salaries based on attendance data.
- **Calendar:** A calendar that displays the dates for the month and allows users to navigate to specific dates.
- **Duty rosters**

In monthly attendance refer to a schedule of work shifts or assignments for employees for a particular month. The duty roster typically includes the dates and times of each shift or assignment, as well as the employees who are assigned to each shift.

- Creating a duty roster for monthly attendance requires careful planning to ensure that each shift or assignment is properly staffed and that employees are assigned to shifts that meet their availability and preferences. Here is a general approach to creating a duty roster:
 - ◆ **Determine the work schedule:** Determine the required work schedule for the month, taking into account factors such as peak workload times, staffing requirements, and employee availability.
 - ◆ **Identify the shifts or assignments:** Identify the specific shifts or assignments that need to be staffed, and determine the length of each shift and the number of employees needed for each shift.
 - ◆ **Assign employees to shifts:** Assign employees to the shifts or assignments based on their availability, skills, and preferences. Consider factors such as seniority, job responsibilities, and any special requests or accommodations.
 - ◆ **Finalize the duty roster:** Once the employees have been assigned to shifts or assignments, finalize the duty roster and communicate it to all employees. Be sure to provide any necessary instructions or guidelines, such as dress code requirements or shift-specific duties.
 - ◆ **Monitor and adjust the duty roster:** Monitor the duty roster throughout the month and make any necessary adjustments to ensure that each shift or assignment is properly staffed and that employees are working the shifts that best meet their needs and preferences.