Human Resources Information System

RESOURCE GUIDE:

A HRIS NAVIGATION TUTORIAL DOCMENT

***f**or*

NEO SOFTWARE PVT., LTD., NEO COMPLEX, BHANIMANDAL, LALITPUR, NEPAL, CONTACT: 9851225672

HRIS TUTORIAL DOCUMENT

INDEX

① Introduction

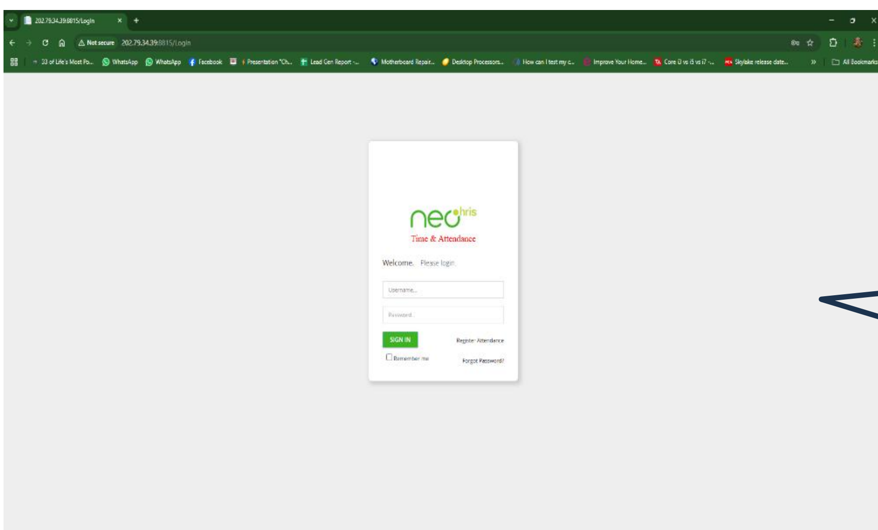
The Human Resource Information SYSTEM (HRIS) includes several modules and its sub features to the Employment Provident Fund (EPF)which automates every user of EPF.

This Navigation Tutorial provides helpful information navigate throughout the system and also can explain every feature available in it. This tutorial provides the background for learning the basics of the Neo HRIS system.

Every section of this tutorial document will follow a similar flow beginning with a system intro, important information and/or screen captures.

② Logging HRIS

Each HRIS user is assigned a unique User ID. As our system is designed on User based access control modality, every user is provided with unique username & password to access the HRIS system on the basis of role assigned. Here as per the requirements of EPF, system can be accessed through EPF’s existing portal (follows the single Sign -in authentication). To obtain a user password, every employee must coordinate HR department or IT as per EPF’s policy, with concern department.



LOG IN SCREEN OF NEO HRIS SYSTEM

Here no new username and password setup is required for accessing HRIS system to login into the HRIS portal. To access the HRIS portal, the user should go to the EPF’s i-portal.

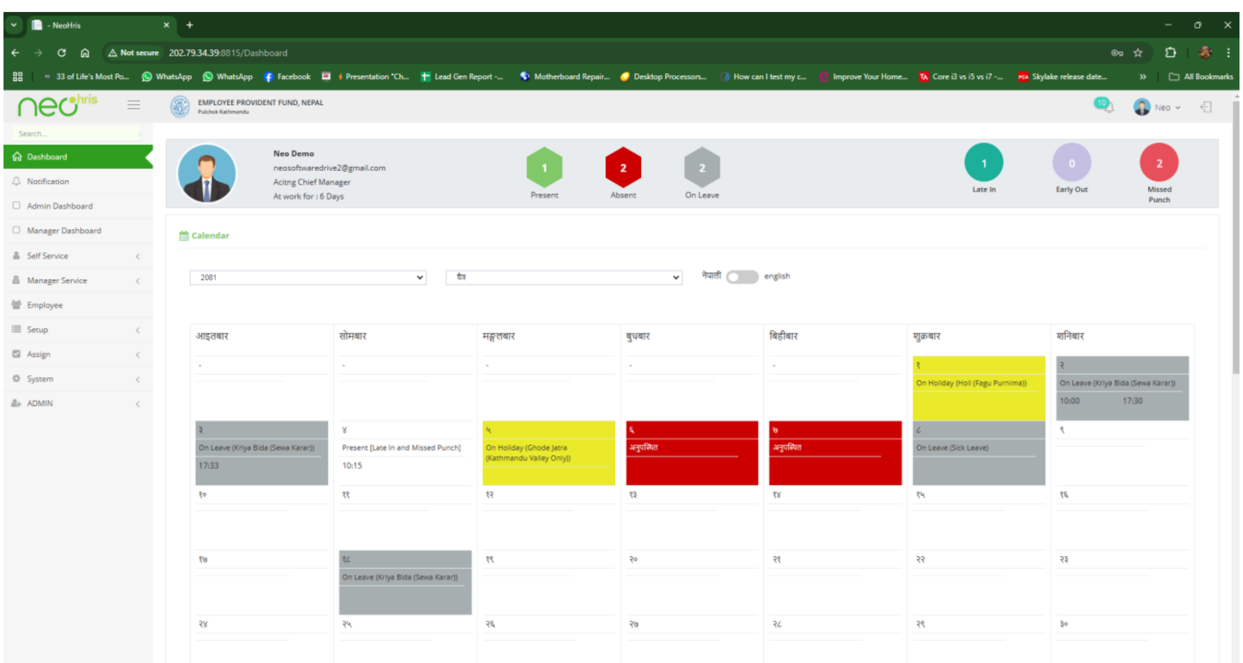
The user will then be directed to the dashboard of neo HRIS system. As below.

Dashboard

After logging into HRIS via EPF's i-portal, the system displays an opening page also known as the "Dashboard"/ homepage (see below). This homepage is the first stop in landing at the HRIS system. Here each employee can view their detailed information like

- **Menu**
  His/her monthly attendance records (Navigation Bar)
  Monthly calendar
  Employee's Brief Introduction
  Selection pane for selecting AD/BS month
  AD to BS Conversion slider
  Notice Board
  Tasks.
  Birthday Wish pane
  Universal Search bar
  Employees Hired/ Left information Pane.
  Employees On leave pane
  Upcoming Holidays pane

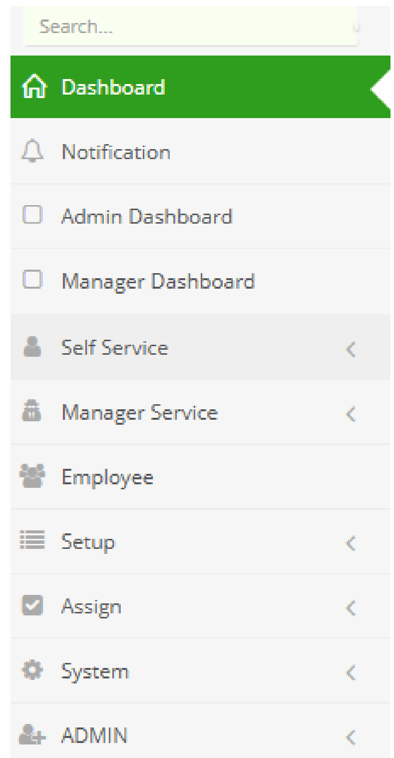
NOTE: All above features are subject to user role assigned.



The dashboard is made up of mainly two sections: the "Menu" section and "Central Calendar".

A. In the left menu pane, users will see vertical menu pane from where user can navigate to different parts of HRIS system. For example, a menu includes all the navigation Headings listed below;

- **Search Bar**
- **Notification**
- **Admin Dashboard**
- **Employee**
- **Setup**
- **Assign**
- **System**
- **Admin**



NOTE: Menu Pane is subjected to user role assigned. Therefore, general user(employee) won't be able to view Admin or Manager level menu pane

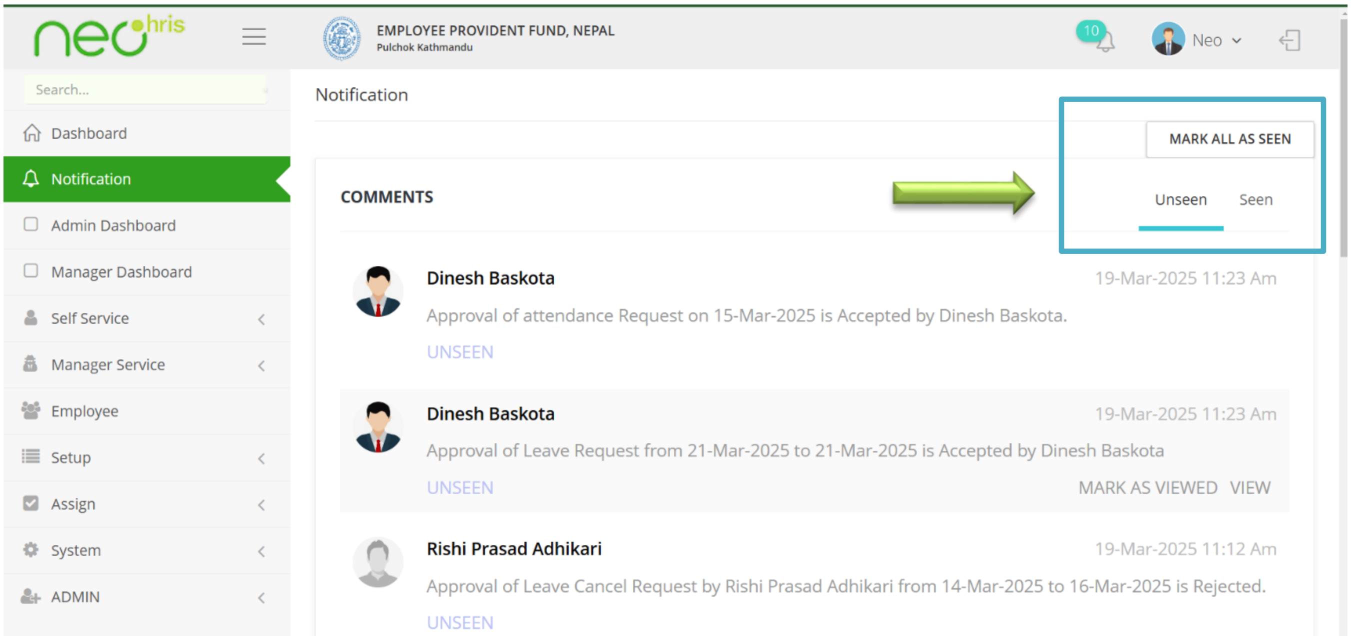
Search Bar: This bar is located at upper Left side of main landing page "Dashboard". So, in order to search any functionalities or modules and reports window, please follow below instructions;

Steps:

Goto upper Left side of main landing page "Dashboard", click and type related features or functionalities.

Notification

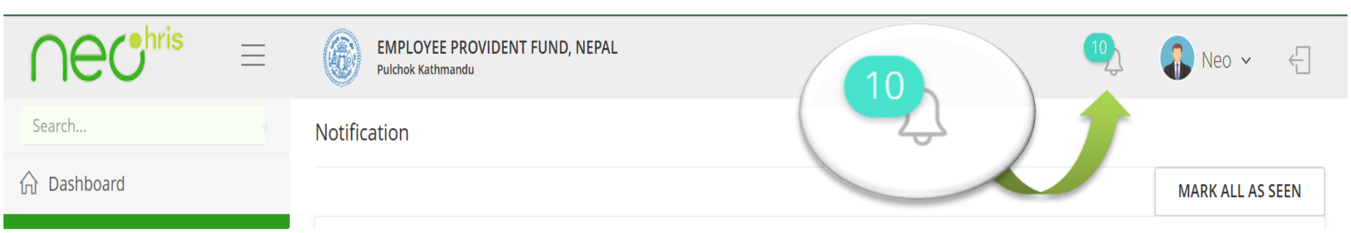
In this menu headings, users can be notified about the subordinate's request, approval, and other updates including his/her own notifications. It also facilitates the applied date and approval date.



Steps1: Navigate your mouse to left hand side of Menu pane and click on the "menu labeled as "Notification" with bell icon .

Steps2.: Now, click on "MARK ALL AS SEEN" button (as shown in above figure) if we need to mark as seen for all shown notifications.
Here, once clicked on this button all notifications shown under Unseen tab will be shown under Sen tab.

Additional: Notification can be accessed through clicking on to bell icon placed at upper right side of every page.

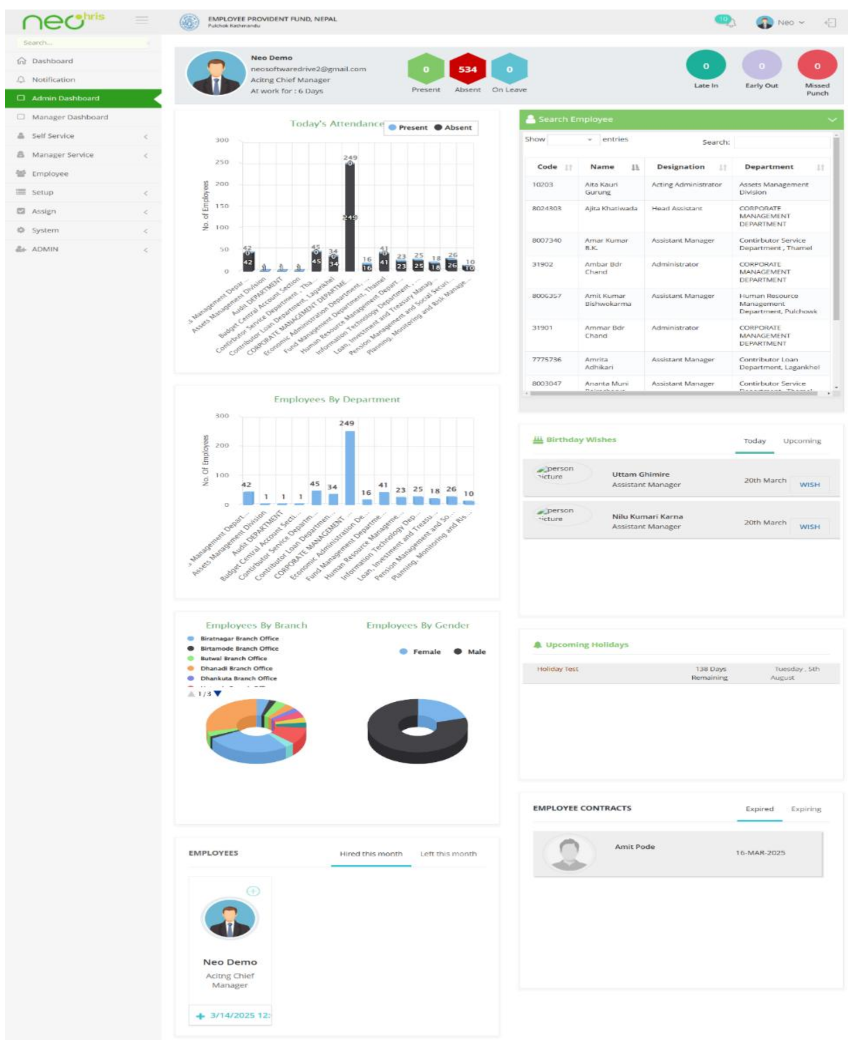


NOTE : [Functionalities of Notification is described in technical document]

Admin Dashboard

This section is for viewing Employee by department wise, Department wise Daily attendance, windows for Employee search, employe contract notification section and other useful graphical informatic tools which can aid in managing entire organizations Human resource operations. Therefore, in order to access Admin Dashboard, please follow the following steps:

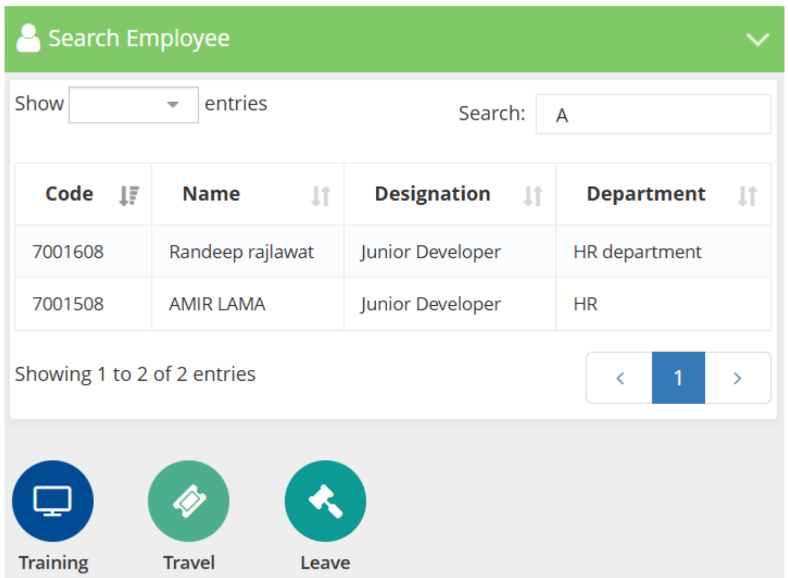
Step 1: Goto Left menu Panel and click on the Menu Headings labeled as "Admin Dashboard" as shown in following figure.



Search Employee:

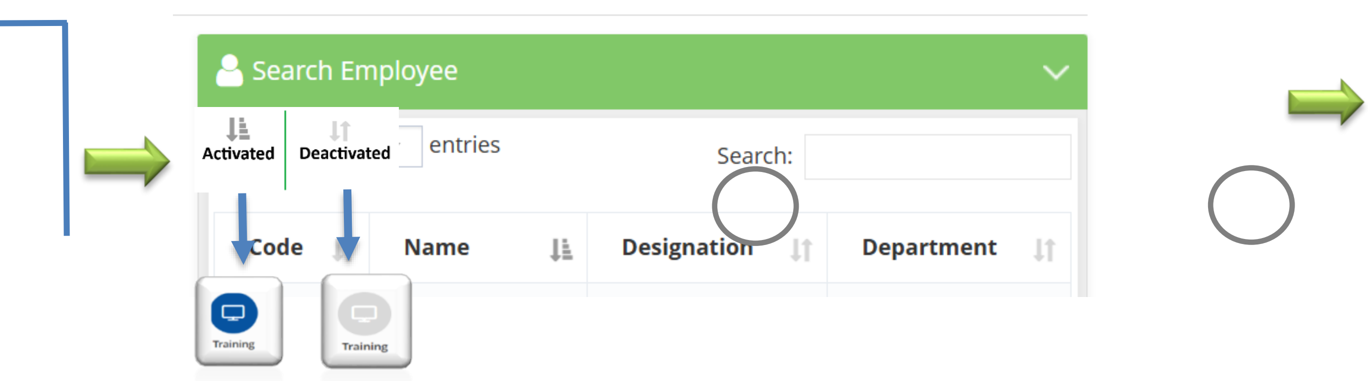
Steps1: Navigate your mouse over upper right side of the page where you can find Section labeled as " Search Employees" and choose the desired number of employee to be displayed.

Step 2: Click on the search box and type the name of the employee to be searched.



Note: We can activate or deactivate the Training, Travel and Leave options from where you can directly navigate to the status menu included under Manager service for which you have to click on As sown below figure; Manager Service is deccribed below uder Manager Service Menu.

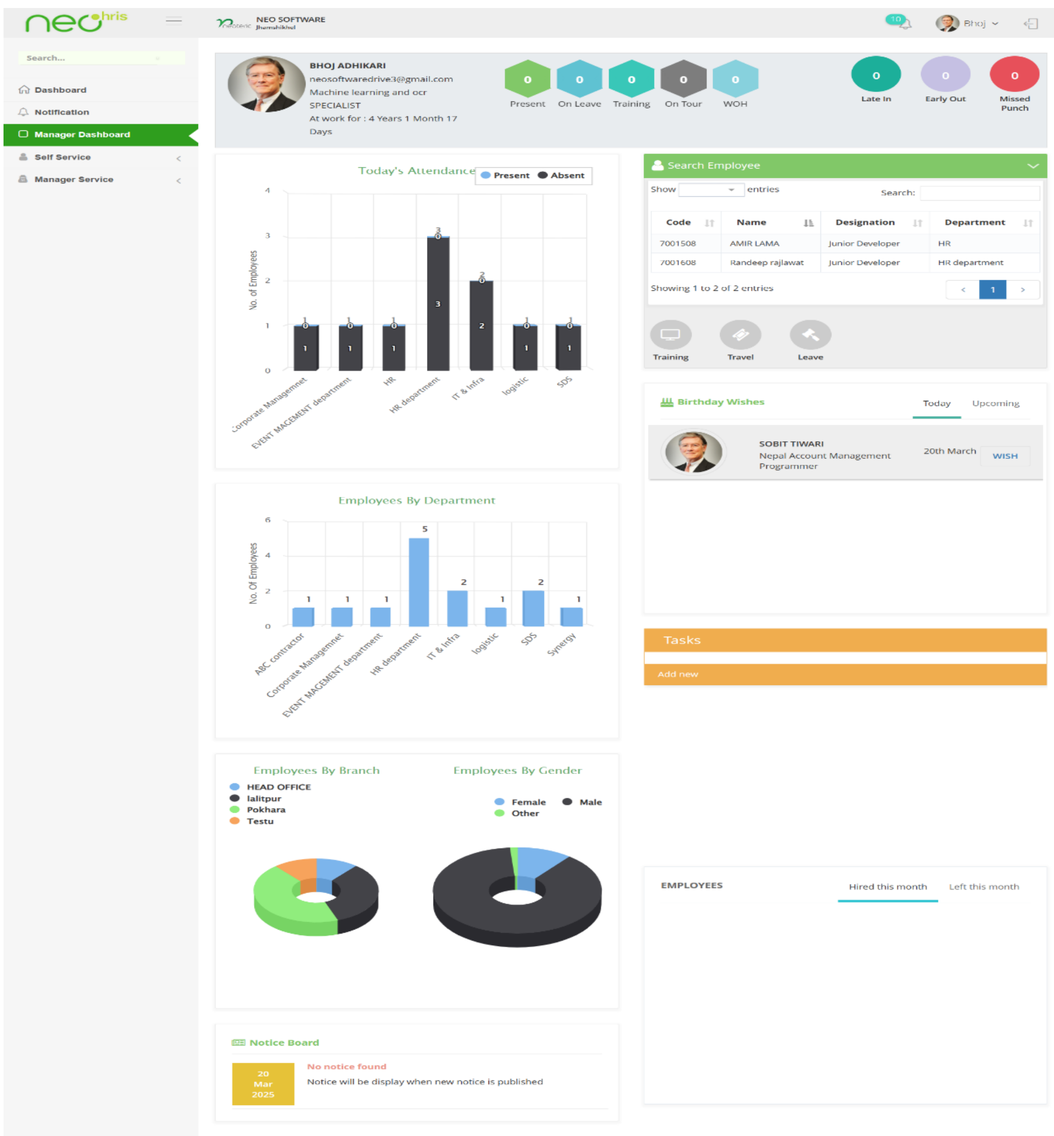
(This applies In every Dahsboard).



Manager Dashboard

This section is for Department Managers who needs to manage its department and its employees. As in the Admin dashboard, this also provides Employee by department wise info graphics, Department wise Daily attendance, windows for Employee search for its department, employe contract notification section, Task windows, birthday wishes section, notice board and other useful graphical informatic tools which can aid in managing entire department operations.

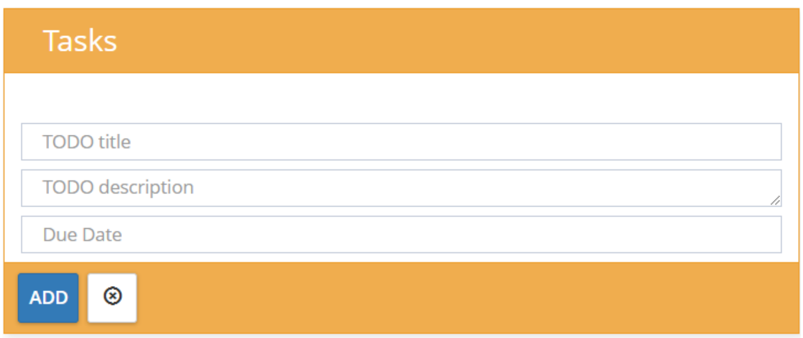
Steps1: Go to Left Vertical menu panel and click on the Menu heading labeled as “Manager Dashboard”. Now on the right-hand side, manager dashboard will get opened.



Additional: Task Window: This is yet other features from where Manager / Admin can assign task to its employee
Steps 1.: For this Scroll down to the bottom of the admin dashboard page and click on the" Add Task" link.

Before Clicking on Add new

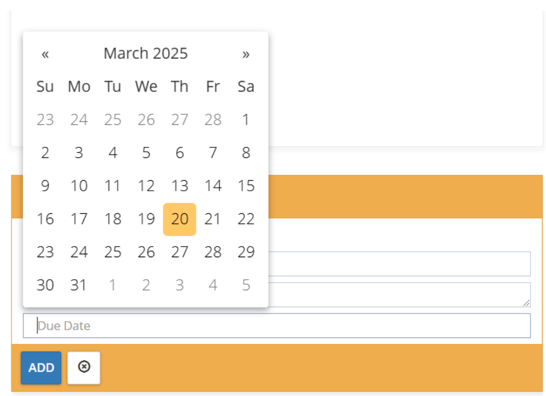
Click here.

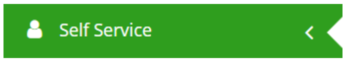


After Clicking on the Add new Link

Step 2.: Now Type Task Title inside the TODO Title box.
Type Task Description details inside Task Description box.
Select the due date within which that respective task has to be completed.

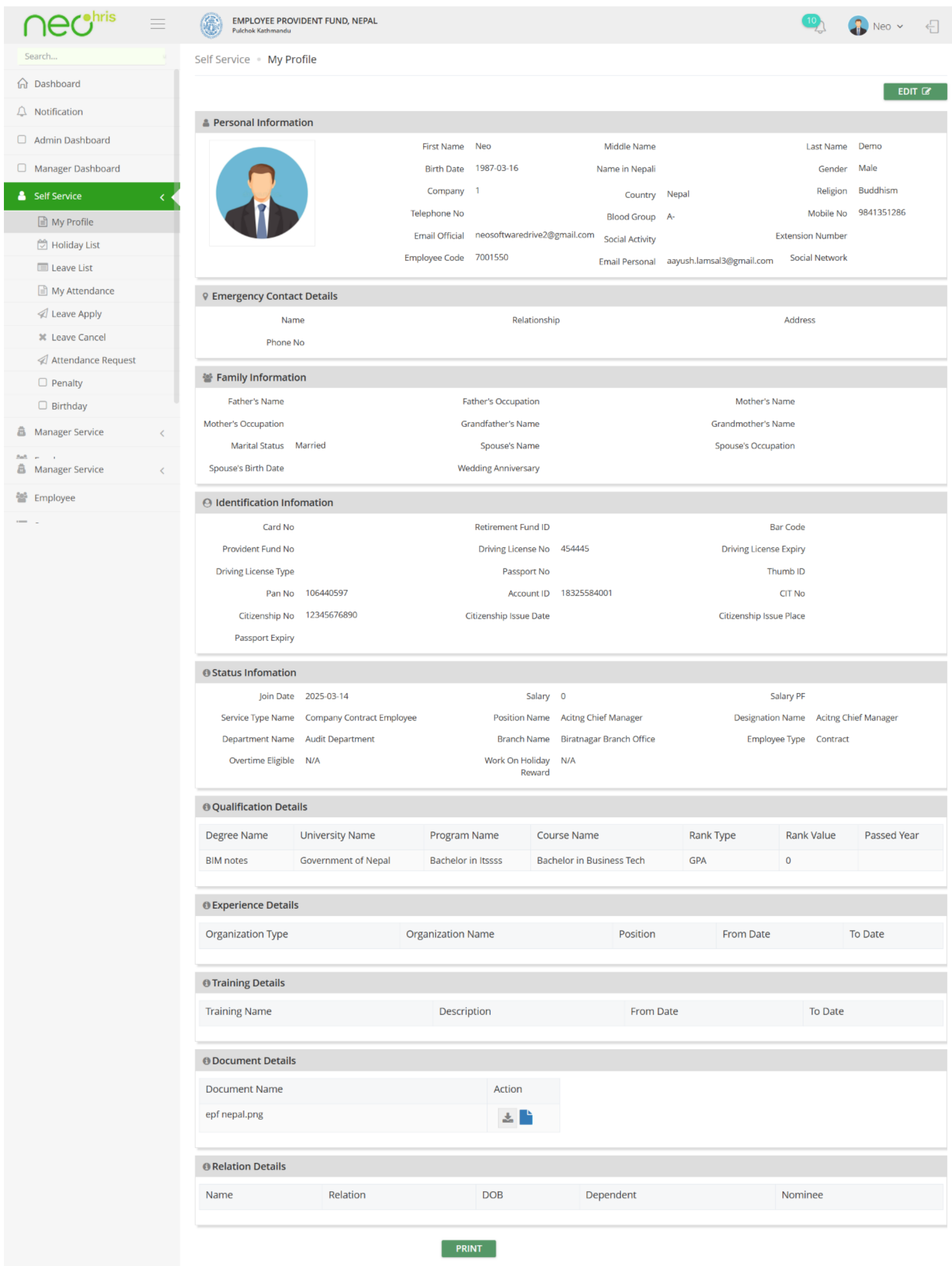
Step 3. Now Click Blue Add button to submit, otherwise click cancel icon button.





Self Service is a parent module which consists of several child module arranged within same one module. This module is designed for all employees who can view their profile, apply or cancel for a leave assigned to him or her, attendance penalty, attendance request option and birthday wish option.

There are additional sub features or sub modules as shown in figure below:



My Profile

In this Sub menu, an employee can view their profile with all necessary information like Family details, Identification, Status and Integration, Employee Qualification, Employee Image Upload, Employee experience, Training, Employee relation and Input confirmation. An employee can make some change which are allowed to edit for general users. Here only Admin can edit the employee profile.
Follow the following steps to navigate into My profile.
Steps1. Click on the My Profile menu link available under its parent Menu “Self Service”.
Step 2. For Print: Click the middle button below if you want to print the employee profile page.

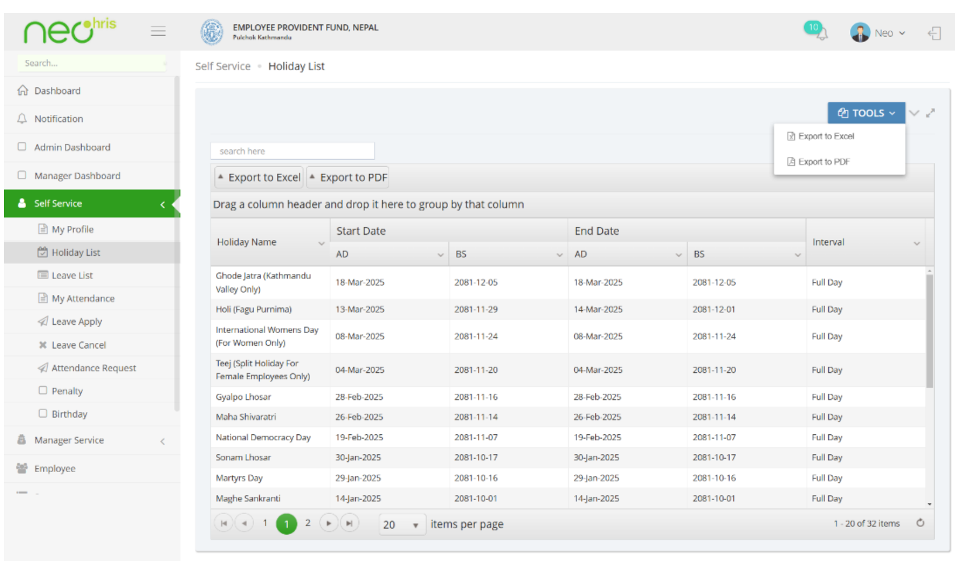
Note: Edit Option is available for Admin Users Only where as general user are allowed only to view the profile.

Additional: Within My Profile Page, at the bottom of the page, there you can find the Document Section from where you can download your document. For this, please follow the following steps:
Steps 1: Navigate your mouse to the Document Details section as mentioned above
and click icon for downloading and viewing.

For downloading  For viewing in new tab

Holiday List

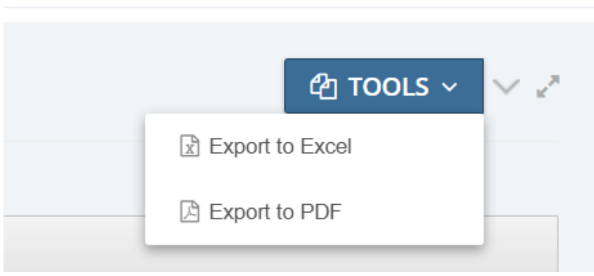
This submenu consists of all the assigned lists of Holidays to the employees for this to view, please follow the steps mentioned below;
For Opening the Holiday List Page:
Steps 1.: Navigate your Mouse over the Holiday List labeled menu and click on it.

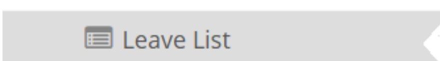


In this Page, All the Holidays are shown with its Start Date and End Date in both AD and BS date format. User can also customize the way he/she wants to view the number of holiday lists rows by choosing the number of rows value to get displayed available on the bottom of the holiday list page.

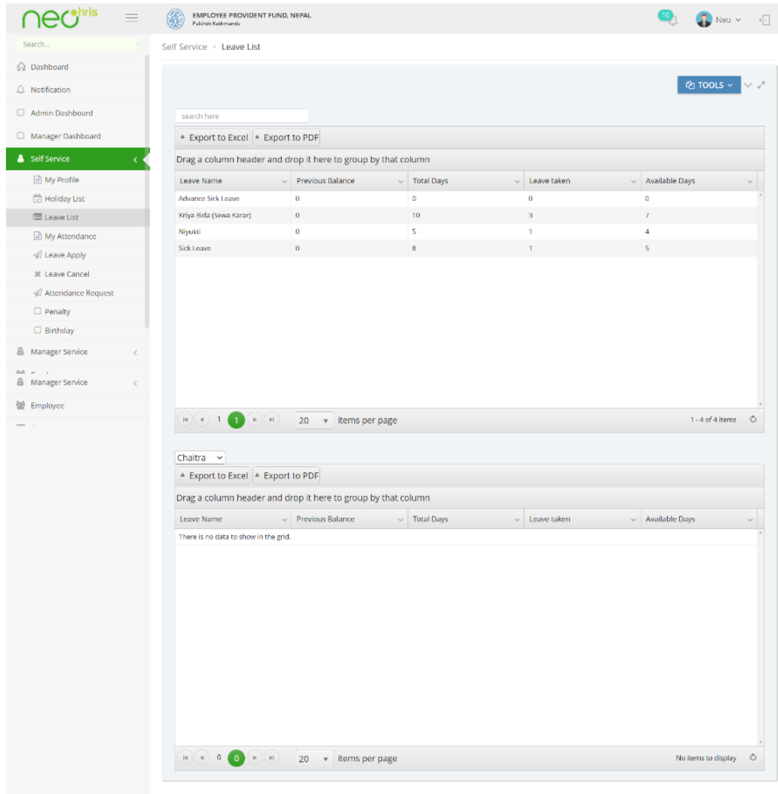
For Exporting the Lists:

Steps 1. Click on the blue button place on the upper right side of the page in order to export the holiday list format of excel or PDF.





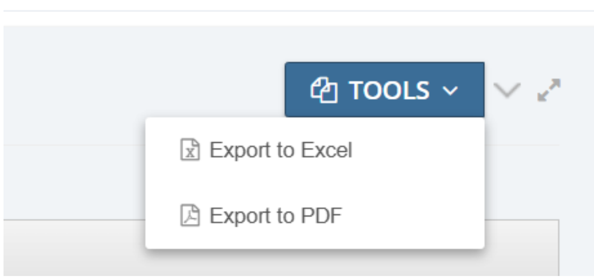
This sub module is basically divided into two sections; the upper section contains all the number of leaves assigned to the employees which contains name of Leaves, Previous Balance of leave, Total Days, leave taken and Available leave days with blue button labeled as Tools on the upper right section of the page and the second which is placed just under first section also consist of similar as upper section but with the drop down box where user can select the desired month of list details as shown in below figure.



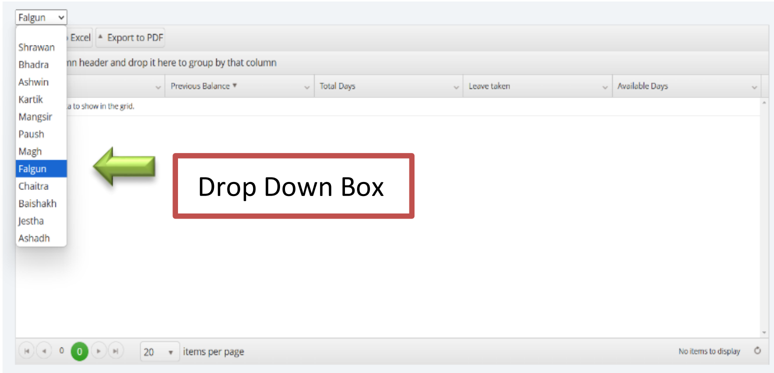
Step 1.: Click on the Sub menu available under Self Service to open the Leave list details.

For Exporting the Lists:

Steps 1. Click on the blue button place on the upper right side of the page in order to export the holiday list format of excel or PDF.

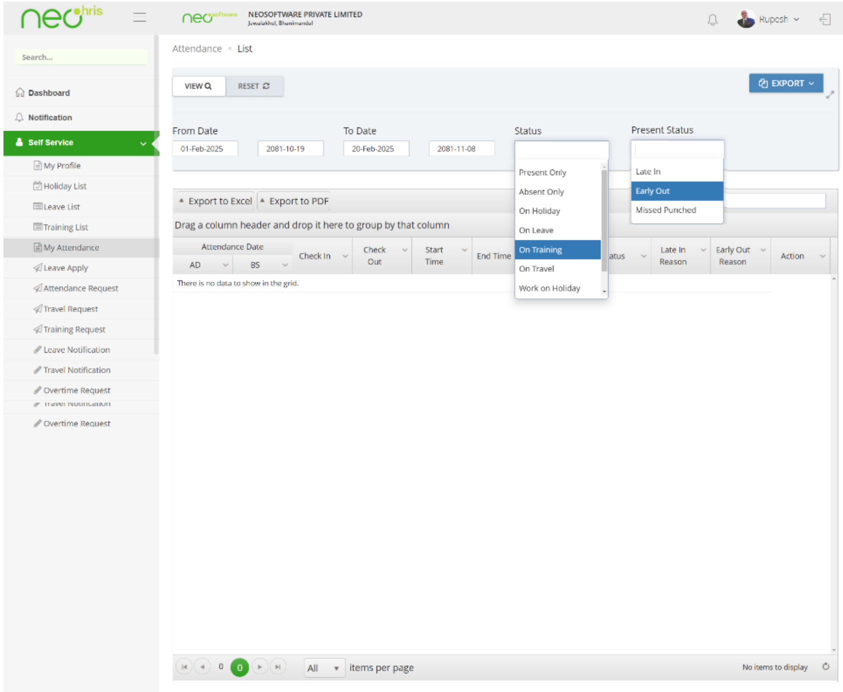


For Selecting Month from Second lower Section:
Steps 1.: Navigate the mouse over drop-down box where you can select the desire month to view the leave details. Figure is shown below;



My Attendance

This Sub modules available under Self Service can be accessed for viewing the attendance report along with the check in and check outs time details. In order to accessit please follow the setp mentioned below;



Steps 1.: Move your mouse over the left side menu panel fourth row below under Self Service and click on it to open My Attendance Page.

Steps 2.: Click on the From Date selection box where calendar will pop up after clicking for selecting the Starting date range selection as required.

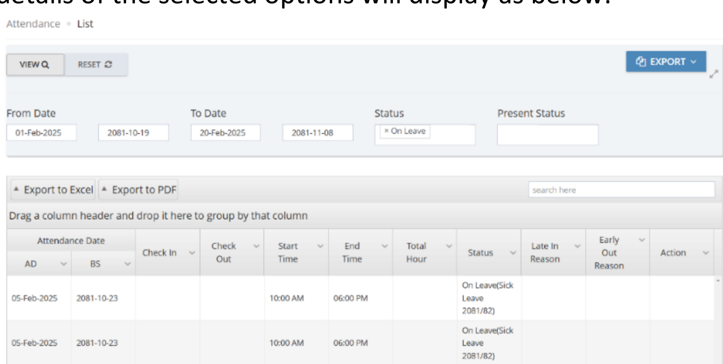
Step 3: Click on the To Date selection box where again calendar will pop up after clicking for selecting the to -date range selection as required.

Step 4.: Click on the "Status" labeled drop down box and select desired option like All Status, Present Only, Absent Only, On Holidays and On Leave.

Step 5.: Click on the "Present status" labeled drop down box and select desired option like Late In or Early Out for viewing the attendance status.

Step 6.: Now Click on the View Button provided on the page.

Now the Attendance details of the selected options will display as below:



Fore resetting the selected options:

Step 1.: Click on the reset button provided just near to the view button and it will clear all the field inserted earlier.

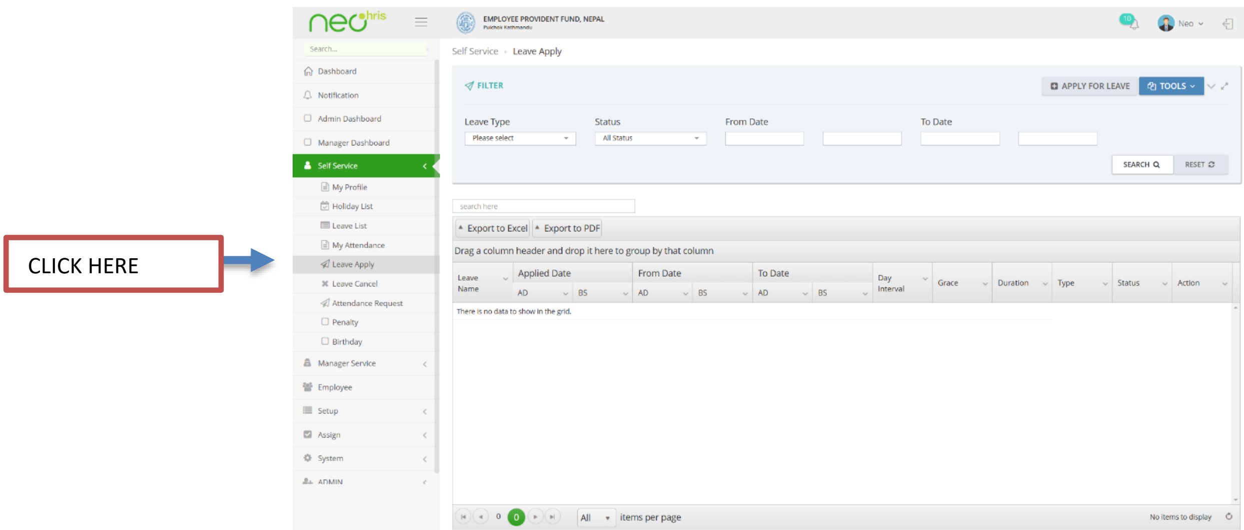
Note: Here both date format is shown and user can use the search option to search necessary detail available under My Attendance. And if we click on the view button without any filter selections, then all the attendance details of whole year starting of Baishak 1st (B.S. date format) will be displayed.

Leave Apply

In this Sub module, employee can apply for the leave assigned to him/her, also where you can get all the details of available leaves like types of leave taken, status of applied leaves, pending status or approved status and leave taken date ranges etc.

To Open Apply Leave Page:

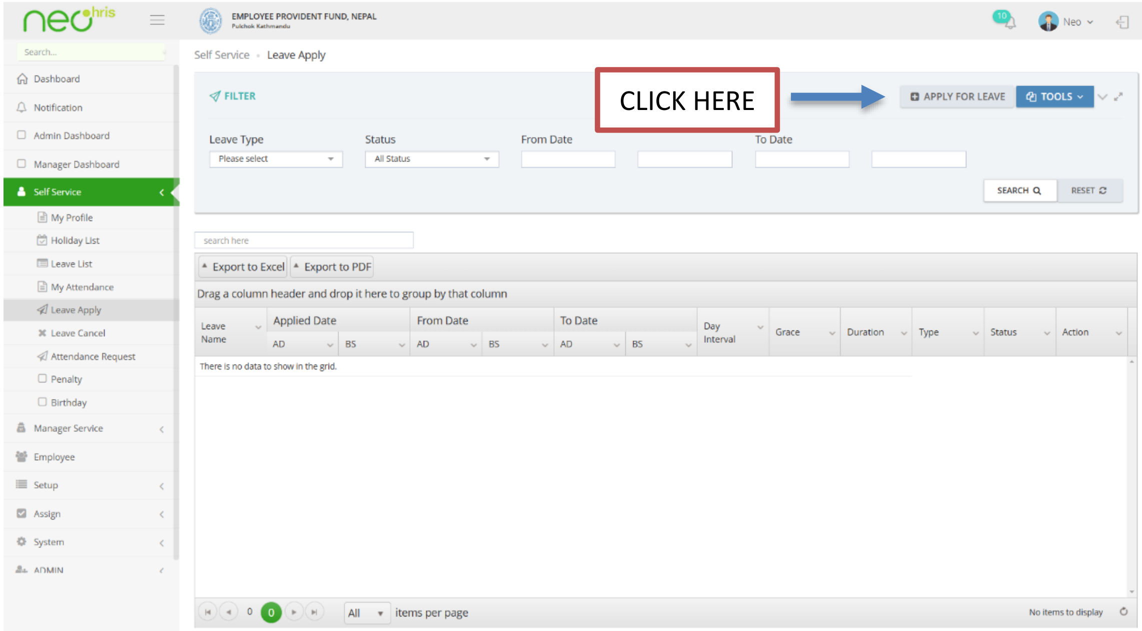
Step1.: Click on the menu list (sub module) of Self Service provided under the fifth row of the self Service to open Apply Leave window.



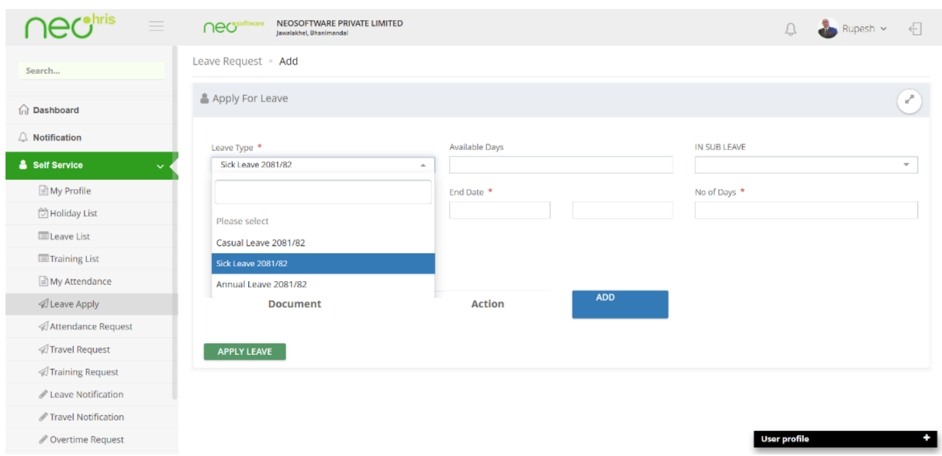
For inserting Leave Filters & Date Ranges:
Step 1.:

homepage that will be important to HRIS Users. Those features include the Search Box, the Go To option, Preferences and the Help Option (see graphic above). These features will be discussed in greater detail in the later sections of this tutorial.

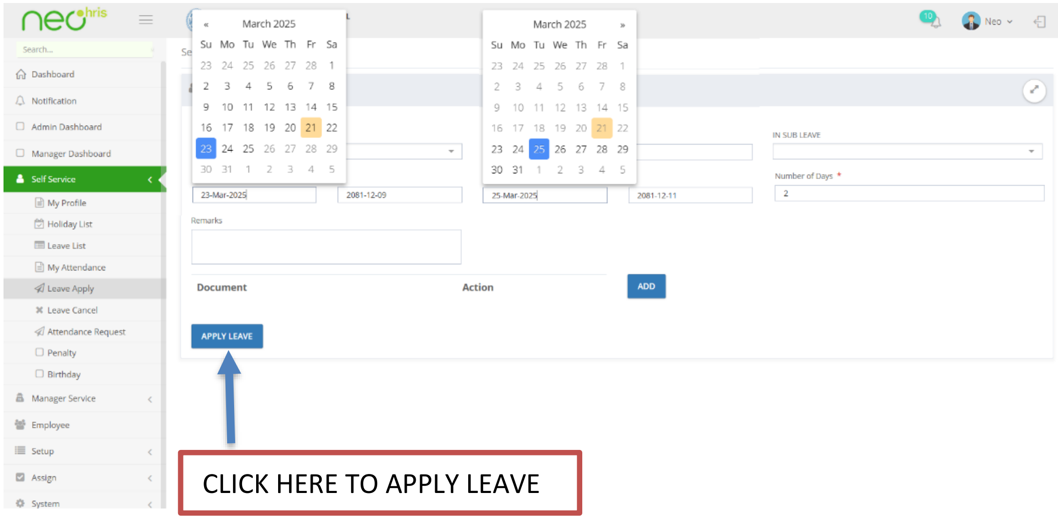
For Applying Leave:
Step1.: Click On the provided button on the upper right side of the page as shown in the figure below.



Step2.: Now Click on the dropdown box labeled as "Leave Type" and select the type of leave that you want to select.

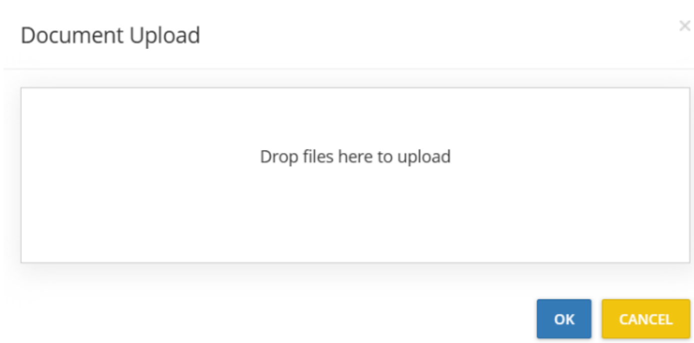


Step 3.: Click on the Start date for selecting beginning of leave date and click on the End date for selecting till date of leave.



Step 4.: Click Apply button for Applying Selected Leave.

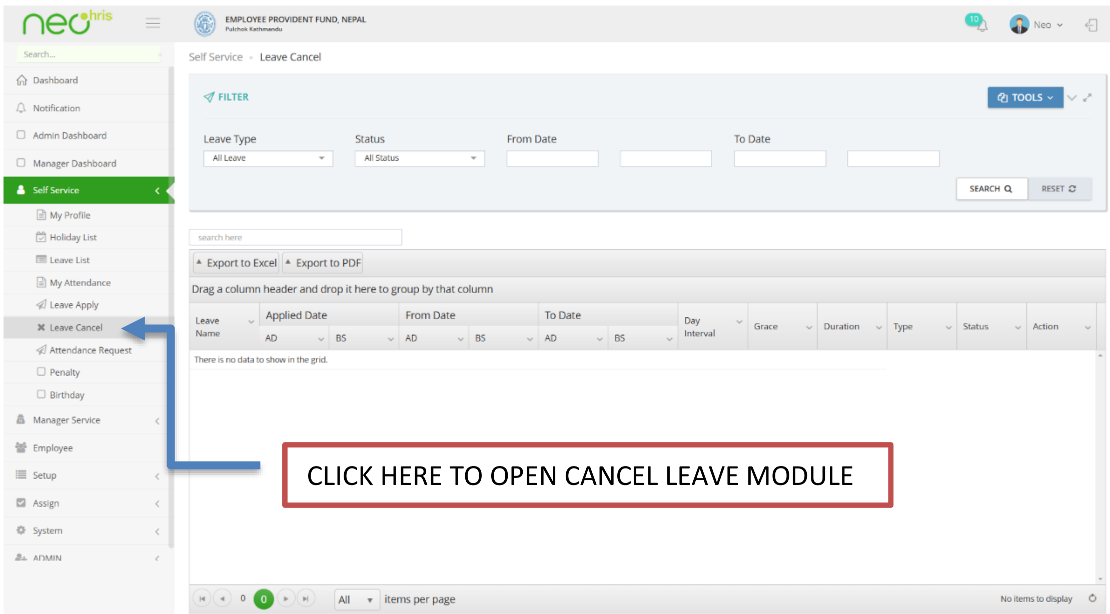
Note: Here employee can attach necessary document while applying for leave if required or as per organization policy and click on the ADD button..



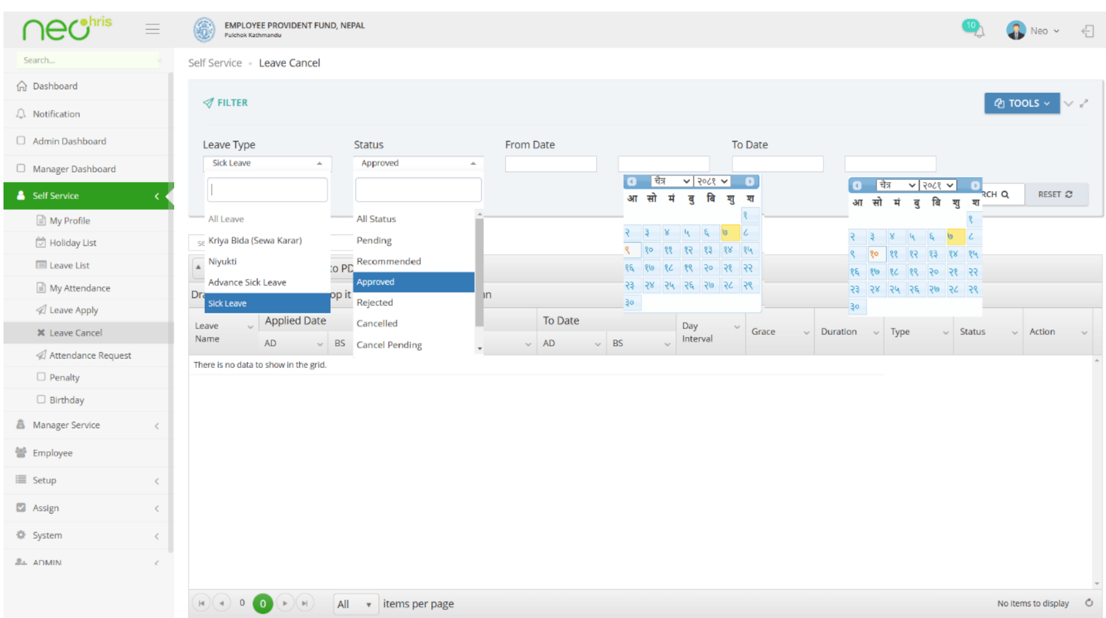
✖ Leave Cancel

This sub module helps in cancelling the applied leave whenever required. Please follow the Steps for accessing the Cancel Leave page.

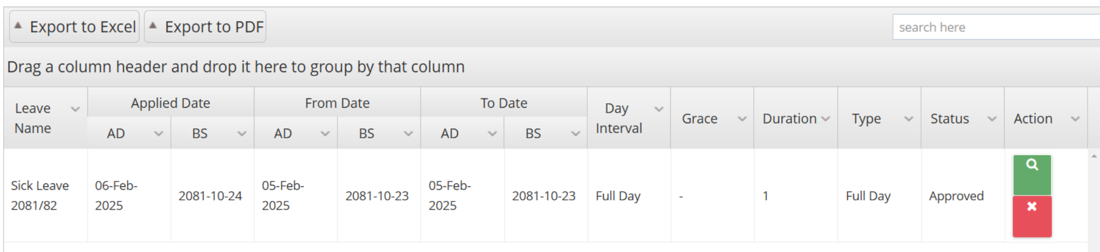
Step 1.: Click on the menu list (sub module) of Self Service provided under the sixth row of the self Service to open Apply Leave window.



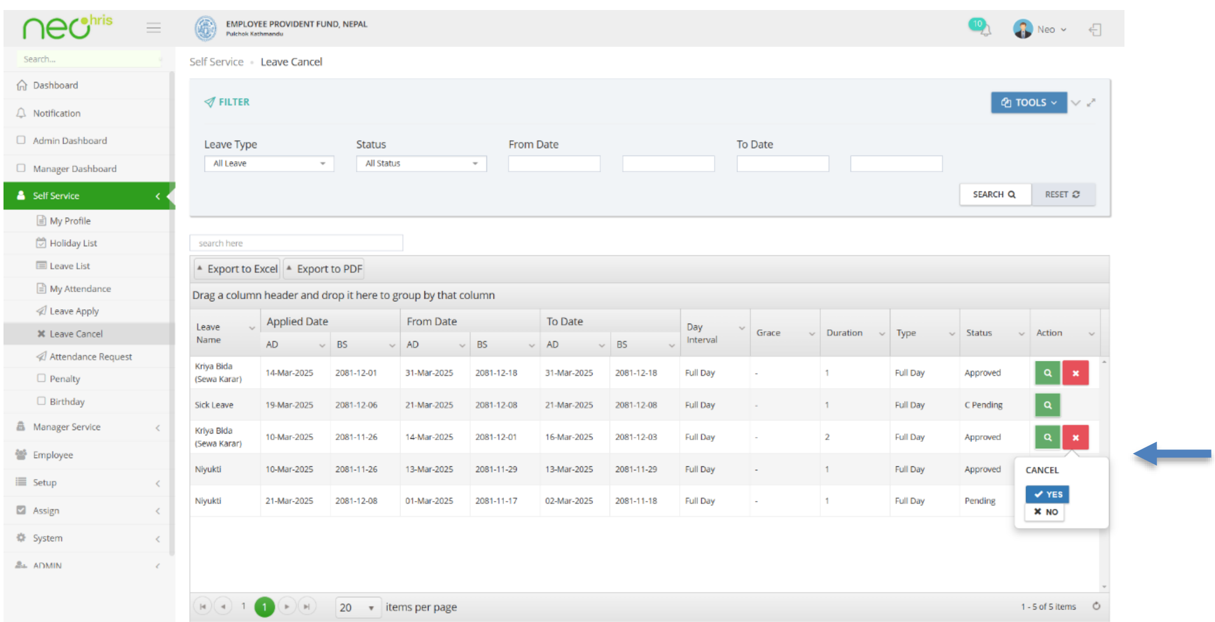
Step 2.: Now Select the date range on both the From date and To date as shown below.



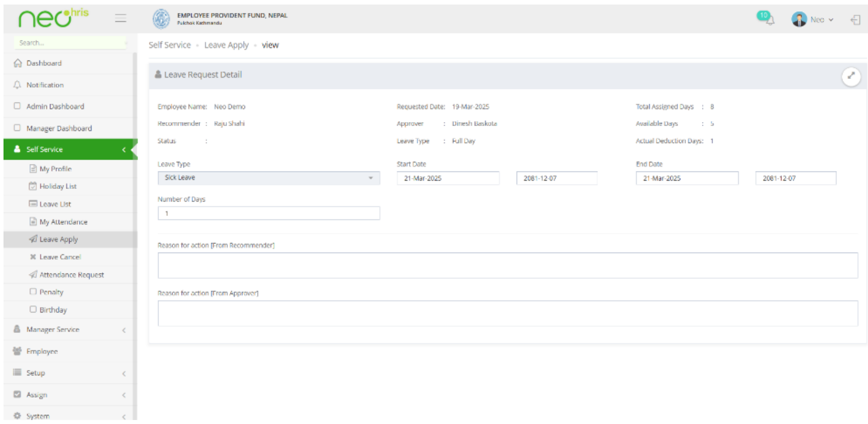
Step 3.: Now Click on the Search Button to view the list of applied that needed to be canceled.



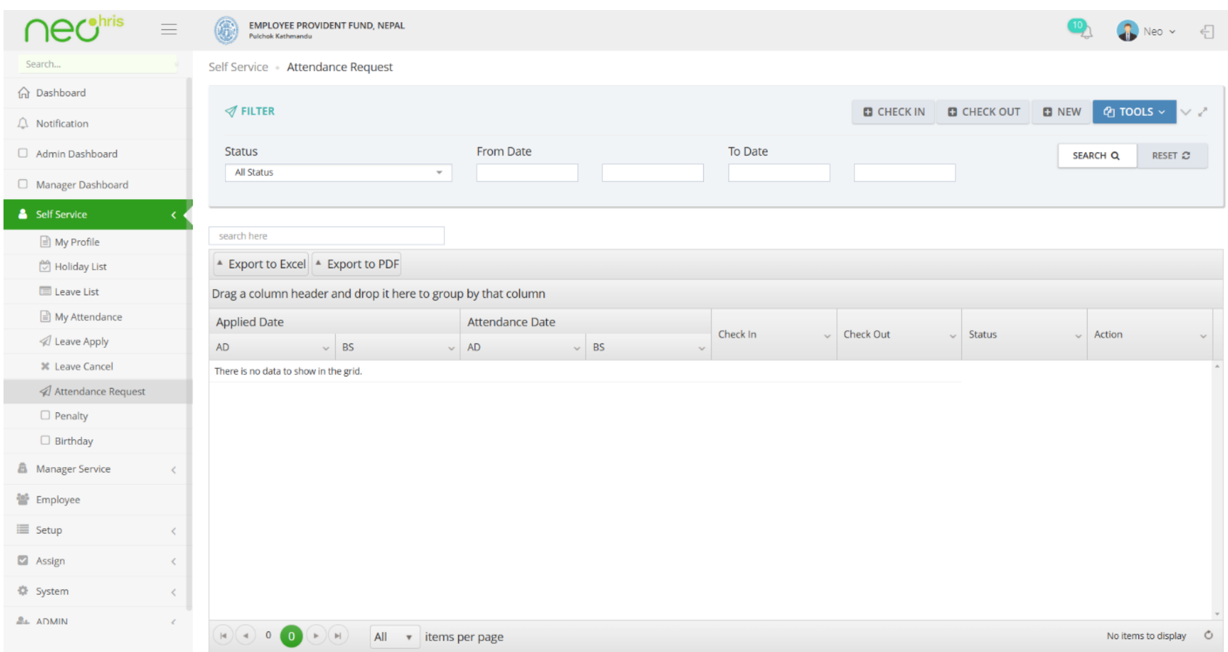
Step 4.: Here in the Leave List windows, click on the RED Cross button in order to cancel the leave as shown in the figure below and click Yes button.



For viewing Leave details:
Just side to red crossed button, there is another button in green color with magnifying glass icon and it is used to vies the details of applied leave.
Steps1.: Click on the green color button with magnifying glass icon then a new window page will open as shown below:



Attendance Request



CLICK HERE TO OPEN ATTENDANCE REQUEST PAGE

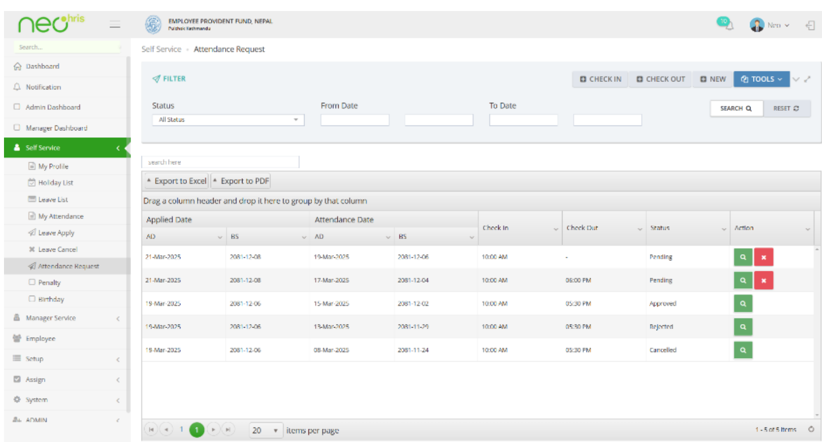
This sub module helps in requesting and viewing self-attendance attendance whenever required. Please follow the Steps for accessing the Attendance Request Page.

For Viewing Attendance request status:

Step 1.: Click on the Self-service and then click on the Attendance Request

Here, A page will now open where you can view the status of the attendance requested

Step2.: Depending upon how you want to view your attendance request status, you will be required to choose an option like Attendance Request status (Pending, Approved, Cancelled, Rejected and Cancel Pending), date range and click search button.



Note: Here if an employee directly clicks search button, then all the attendance request status will be displayed.

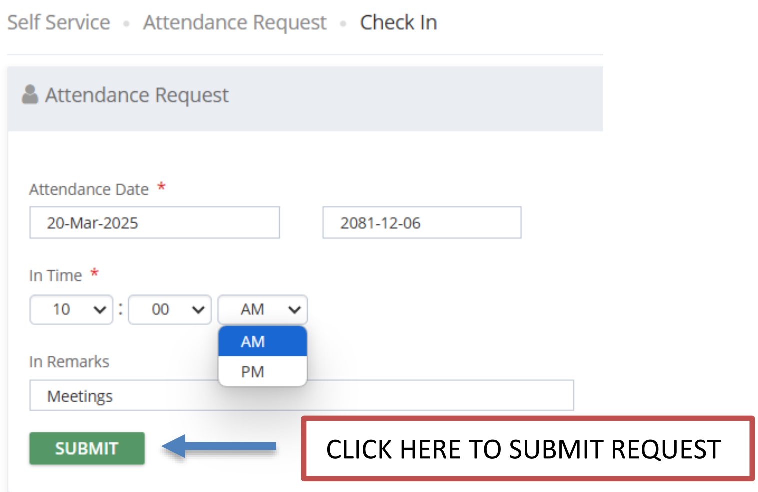
For Applying Check In Attendance:

Step 1.: Click on the Self-service and then click on the Attendance Request listed under it. Here, A page will now open where you can apply for missed check in attendance.

Step 2.: Now click on the "CHECK IN BUTTON" placed on the upper right side of the screen. Now a page for applying Missed attendance will be displayed.

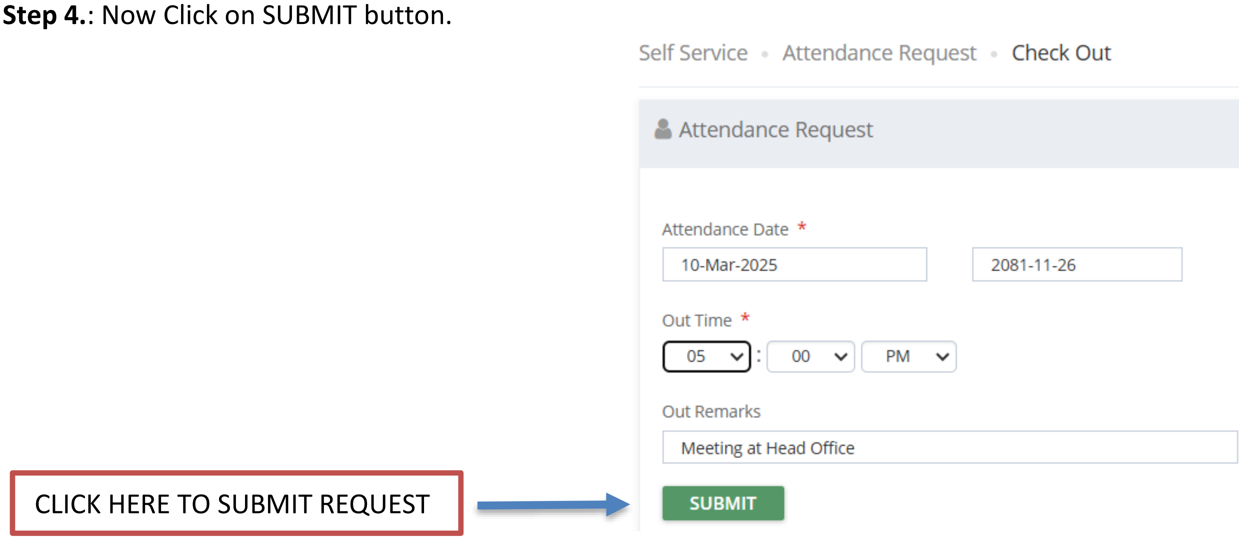
Step 3.: Select the missed date range, select regular office time and type a reason for missed punch.

Step 4.: Now Click on SUBMIT button.



For Applying Check Out Attendance:

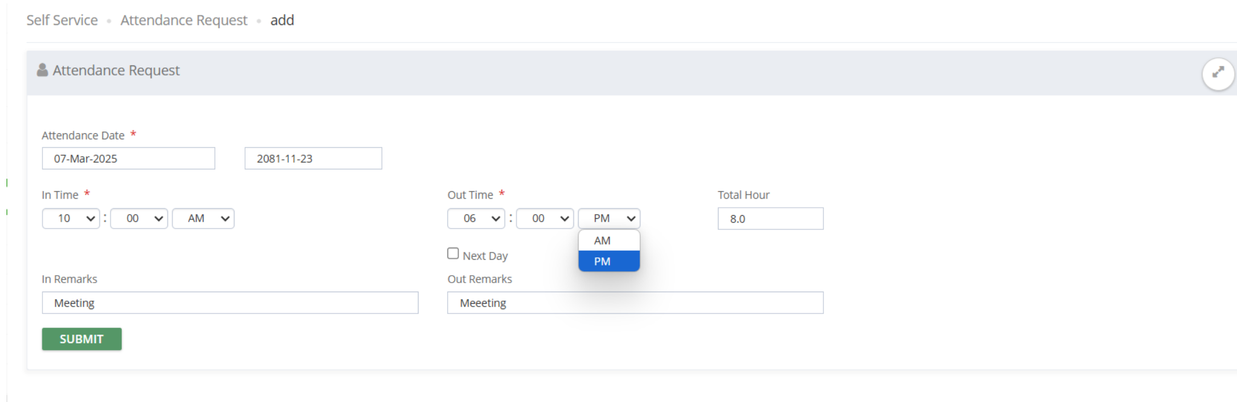
Step 1.: Click on the Self-service and then click on the Attendance Request listed under it. Here, A page will now open where you can apply for the Check Out attendance.
Step 2.: Now click on the "CHECK OUT BUTTON" placed on the upper right side of the screen. Now a page for applying Missed attendance will be displayed.
Step 3.: Select the missed date range, select regular office time and type a reason for missed punch.
Step 4.: Now Click on SUBMIT button.



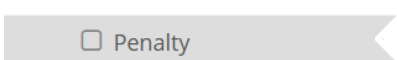
For Applying Full day Attendance:

Step 1.: Click on the Self-service and then click on the Attendance Request listed under it. Here, A page will now open where you can apply for the Full Day attendance.
Step 2.: Now click on the "NEW BUTTON" placed on the upper right side of the screen. Now a page for applying missed attendance will be displayed.
Step 3.: Select the missed date range of check-in and checkout, select regular office time and type a reason for missed punch.

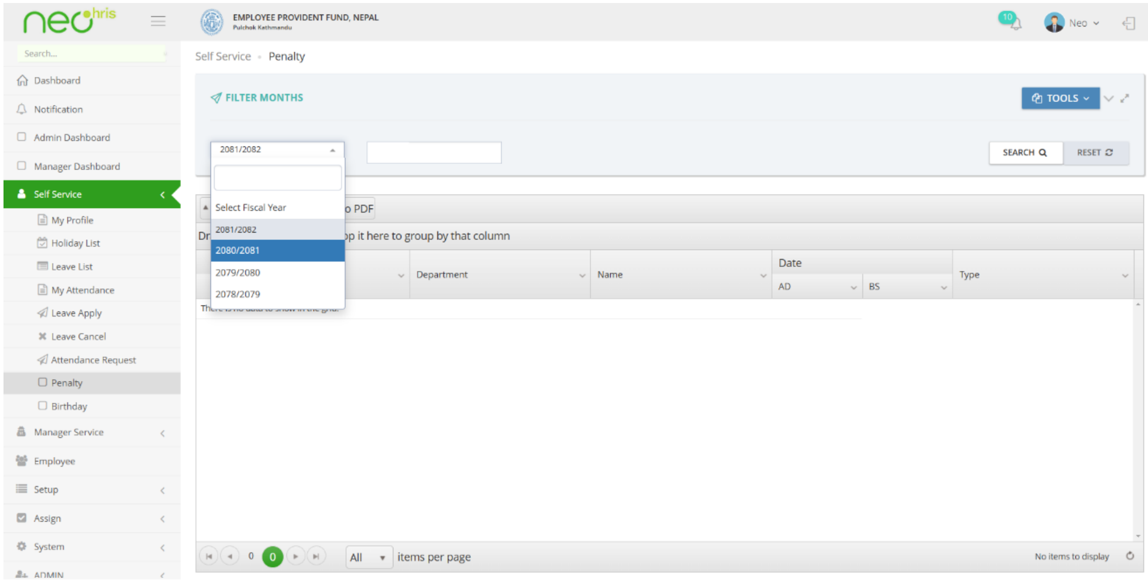
Step 4.: Now Click on SUBMIT button.



CLICK HERE TO SUBMIT REQUEST



This Sub module of Self Service displays the number of penalties given to the employees.



Steps 1.: Click on the self-service menu from the left vertical menu panel.
Step 2.: Now click on the Penalty menu available under 8th row of self-service.

Now Penalty page will be opened.

Step 3.: Select the required Fiscal year and month.
Step 4.: Click Search Button.
Now all the penalty details will be displayed on the middle screen.

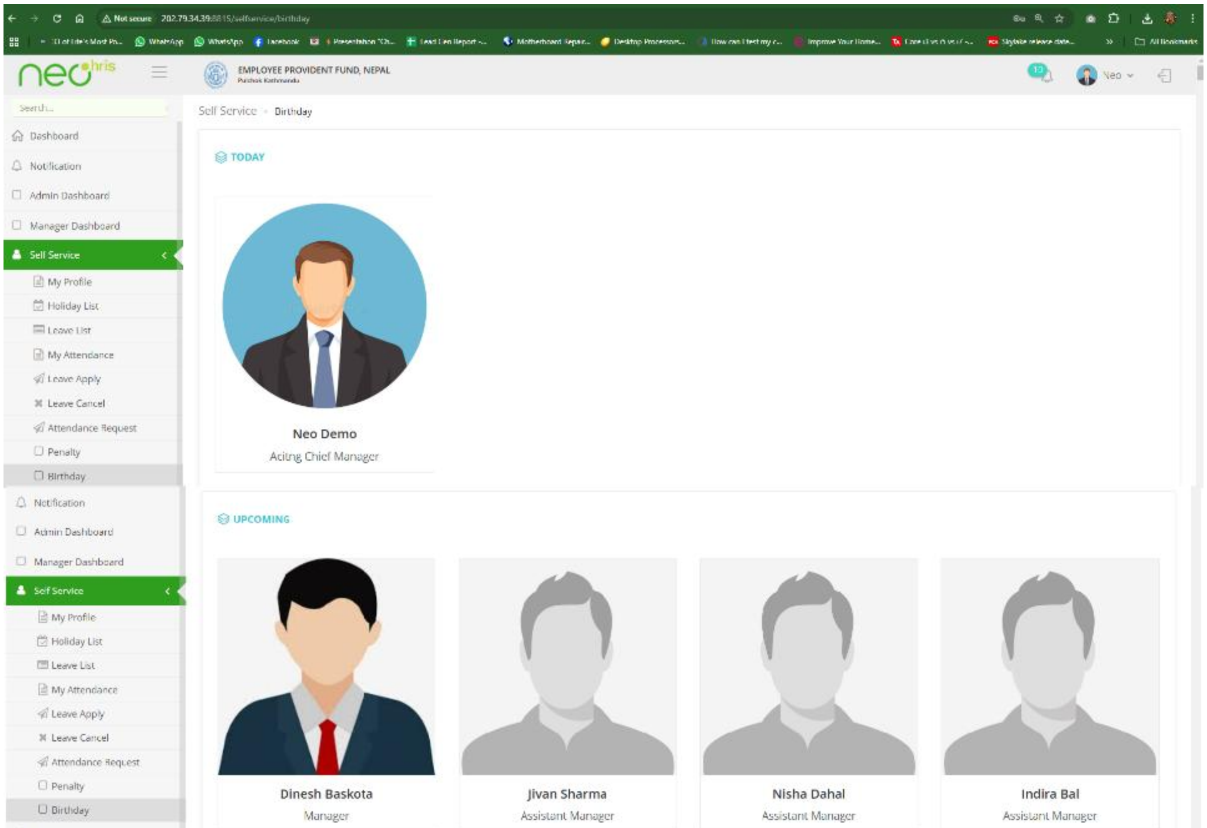
Note: Penalty is applicable to employees only when total number of late In and Early out reaches equivalent to one day hours in one month.

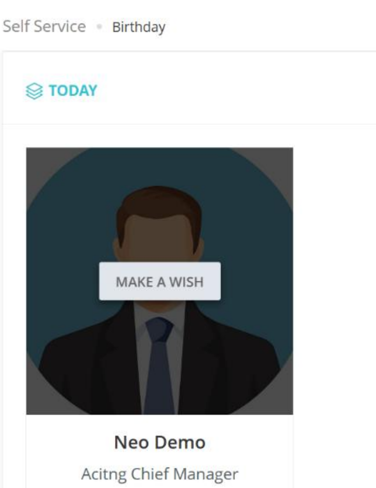
☐ Birthday

This Sub module from Self-Service is useful for wishing friends and colleagues from same office, departments or branch.

Steps 1.: Click on the self-service menu from the left vertical menu panel.

Step 2.: Now click on the Birthday menu available under 8th row of self-service.





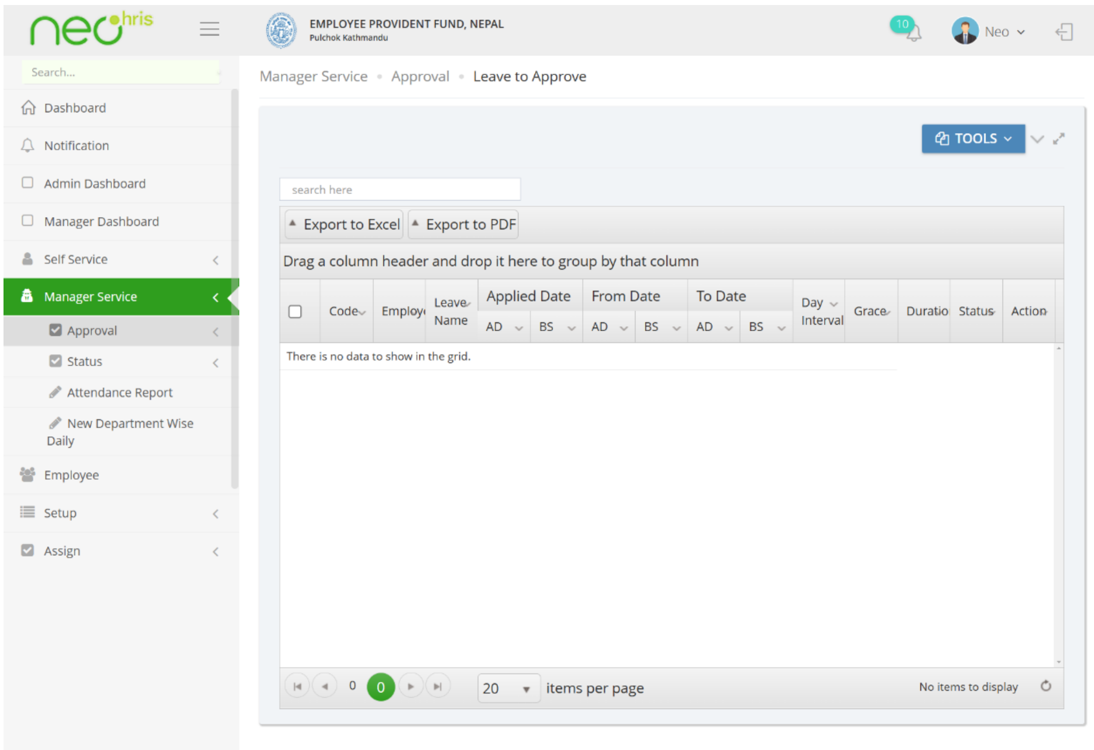
Birthday window is divided into two sections, one is TODAY and other one is labeled as UPCOMING

Inside the TODAY section, all employees' birthdays that fall on the current day (today) will be displayed. whereas inside UPCOMING, al upcoming birthdays of employees are displayed.

Step 3.: Click on WISH button displayed over employee's image under TODAY section.

Manager Service

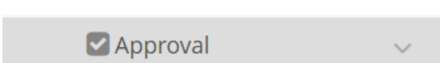
The Manager Service module of an HRIS system includes capabilities that allow managers to monitor attendance information alongside managing leave requests and shifts and performing activity evaluations as well. The system delivers immediate data about employee daily attendance to help managers see the policy adherence. The module encompasses three functions: Leave approval, Attendance approval and activity tracking as well as document handling for employee records. The module enables automated reporting functions while improving employee-HR communication and supports reliable decision-making through data analytic tools.

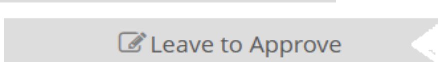


In order to access the Manager service, one can follow the following listed steps:

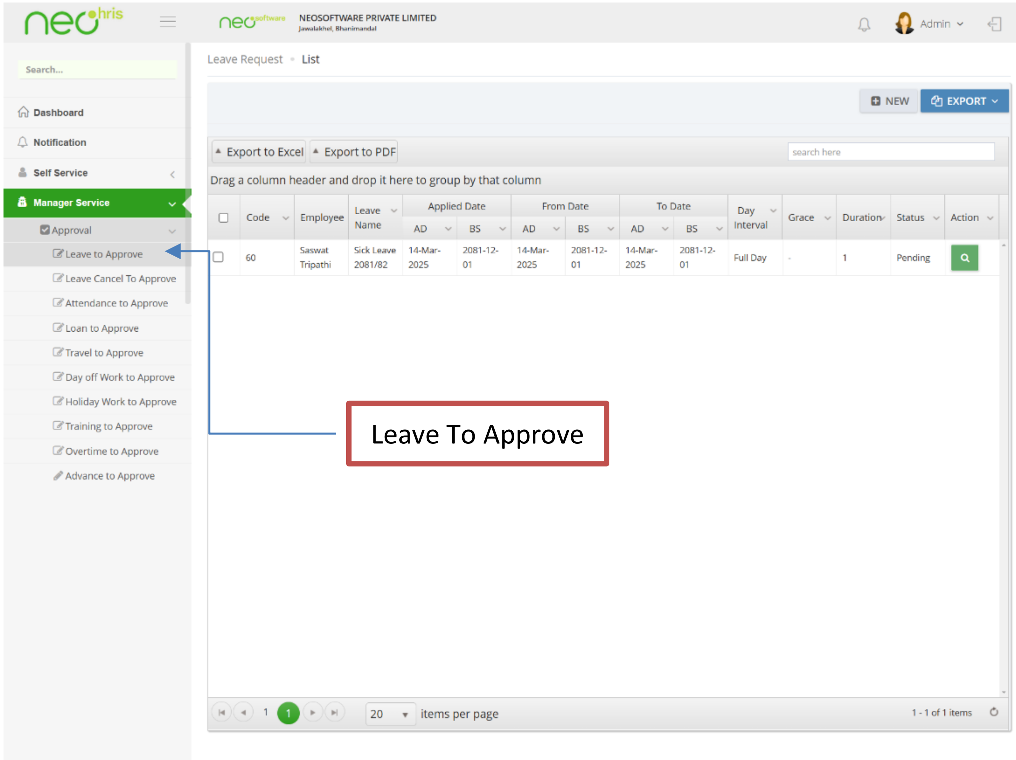
Step 1: Navigate your mouse over manager Service menu and click on it.
Step 2: After clicking, Manager Service menu expands further and displays lists of its sub functions like ;

- Approval
  - Leave To Approve
  - Leave Cancel To Approve
  - Attendance To Approve
- Status
  - Leave Status
  - Attendance Status
- Attendance Report
- New Department wise Daily



Step 3: 

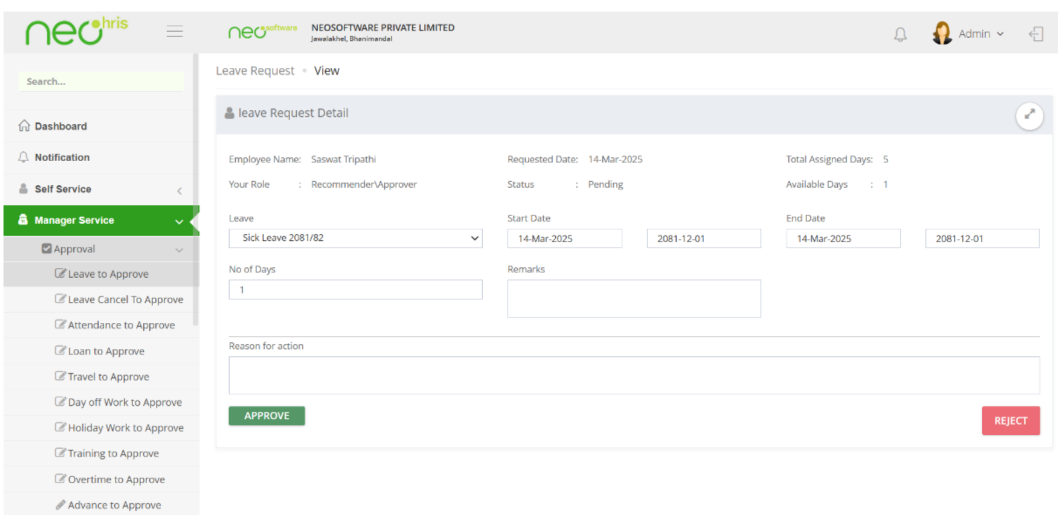
Now click further on the Approval and then to Leave to approval.



Now, A page with list of all applied leaves is shown in the middle screen, where a green button with magnifying glass icon is shown on the left side of the main screen.

Step 4: Click on the green icon to process for approval.

Step 5: Now as shown in the figure, a manager can either approve a leave or reject it. So, for same purpose, there are two buttons provided. One Green Approve button for approval and the other button in red color is for rejection. Refer to the figure 32.



Here in the above screen, the main screen (Leave Request Details) consists of all the applied leave details for a manager to perform an action.

As mentioned in earlier above modules also, leave approval data can be exported in excel or in PDF format through Export to Excel Button / Export to PDF button available under Tools button.

Leave Cancel To Approve

The **Leave Cancel to Approve Module** allows managers to review and process employee. Managers can reject approved leaves based on company policies or any reasons. Once approved, the cancelled leave status updates automatically in the HRIS system. The module ensures accurate leave records and real-time tracking for salary adjustments.

Steps 1: Navigate your mouse over manager Service menu and click on it.

Step 2: Click on the Cancel To Leave Approve menu.

Now a new page with the employees leave details will be displayed on Leave Cancel To Approve Screen.

FIGURE

Step 3:

18 Attendance

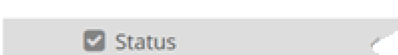
Attendance to Approve

The **Attendance to Approve Module** allows managers to review and process employee's requests. Managers can reject or accept the attendance requests based on the company policies or on any valid reasons. Once approved, the attendance status updates automatically in the HRIS system. The module ensures accurate attendance records and real-time tracking for salary adjustments.

Steps 1: Navigate your mouse over manager Service menu and click on it.
Step 2: Click on the Attendance to Approve menu.
Now a new page with the employee's attendance request details will be displayed on Attendance To Approve Screen.

FIGURE

Step 3:



The Status module in the HRIS tracks two details, one is leave and the other is Attendance of every employee

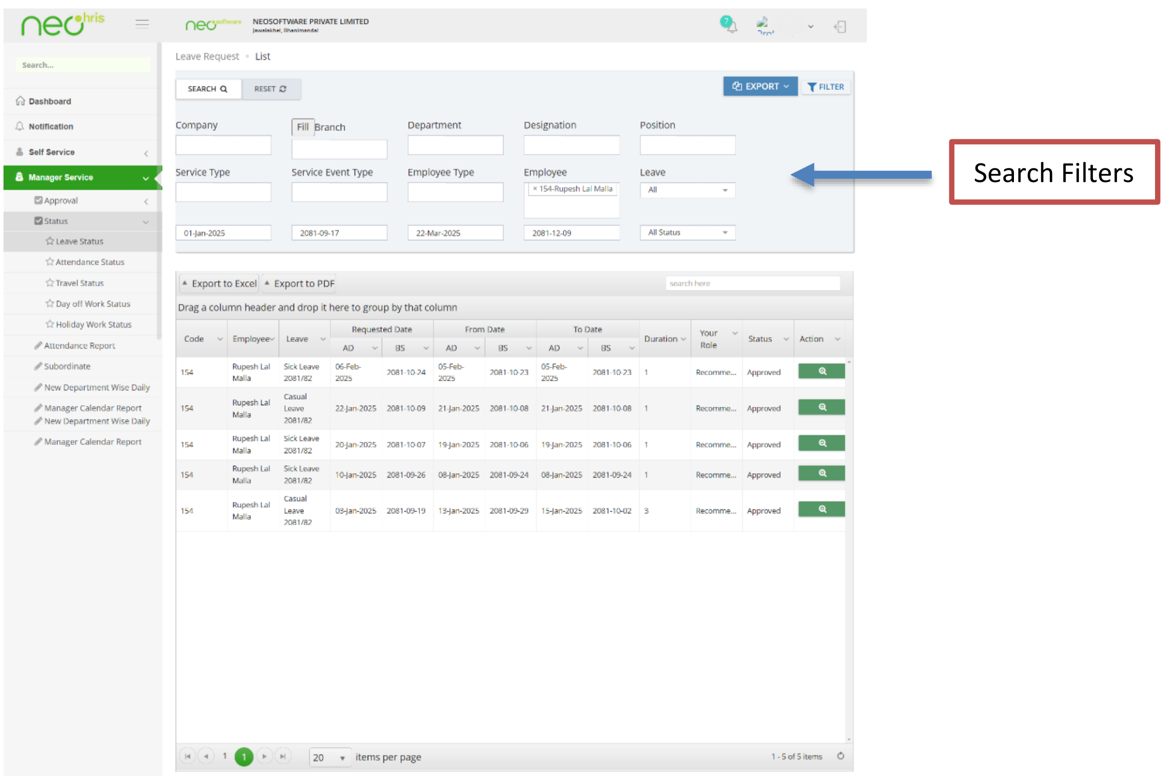
under that specific manager.
To access the Status module of Manager Service, follow the steps mentioned below:

Step 1: Navigate your mouse over manager Service menu and click on it.
Step 2: Click on the menu called Status located under Manager Service after Approval sub module. Following four Sub module will be displayed under STATUS menu:

- Leave Status
- Attendance Status
- Attendance Report
- New Department wise daily Report

☆ Leave Status

The Leave Status module in the HRIS tracks employee leave details, including employee name and code. It displays the applied date, leave type, and current status, whether pending, approved, or rejected. The module also shows recommendations from supervisors and final approval decisions. This ensures a transparent and efficient leave management process for employees and HR.

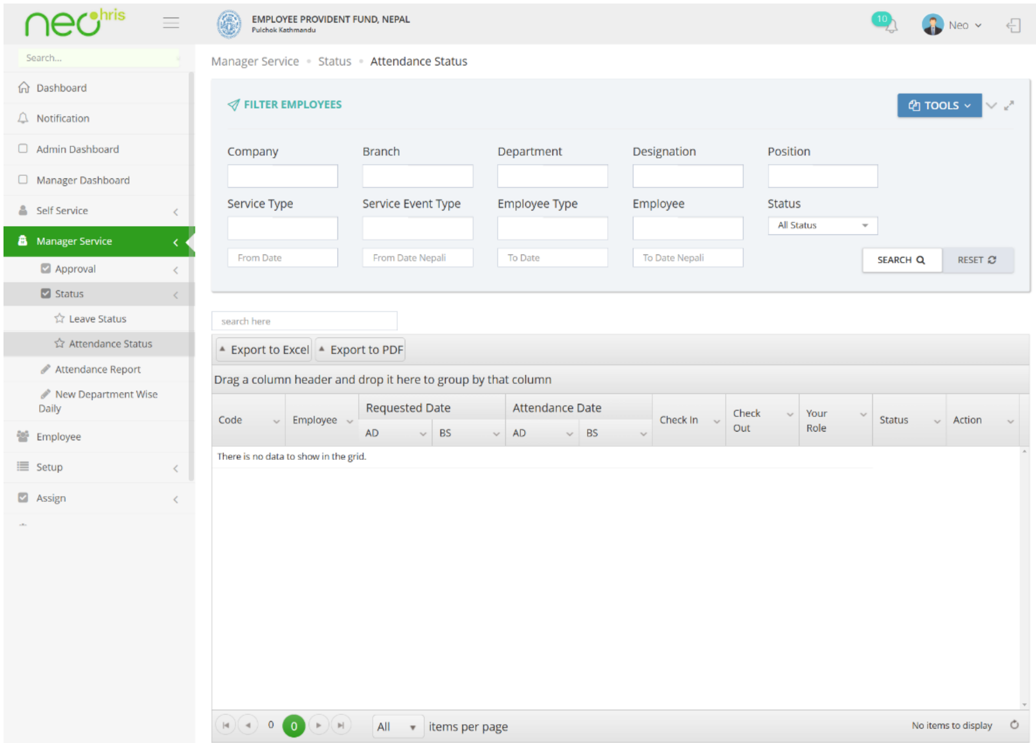


Note: In above Figure, a user can search details using search filters like departments, employee name, Leave Type, service Type and employee type.

21 Attendance

☆ Attendance Status

The Attendance Status module in the HRIS tracks employee attendance details, including employee name and code. It displays the attendance applied date, attendance request date, check in time, Check out Time, current status, whether pending, approved, or rejected and role for taking actions on requested attendances. This ensures a transparent and efficient leave management process for employees and HR.



STEPS:

Step 1: Navigate your mouse over manager Service menu and click on it.
Step 2: Click on the menu called Status located under Manager Service after Approval sub module. As previous status sub module, following four Sub module will be displayed under STATUS menu:

- Leave Status
- Attendance Status
- Attendance Report
- New Department wise daily Report

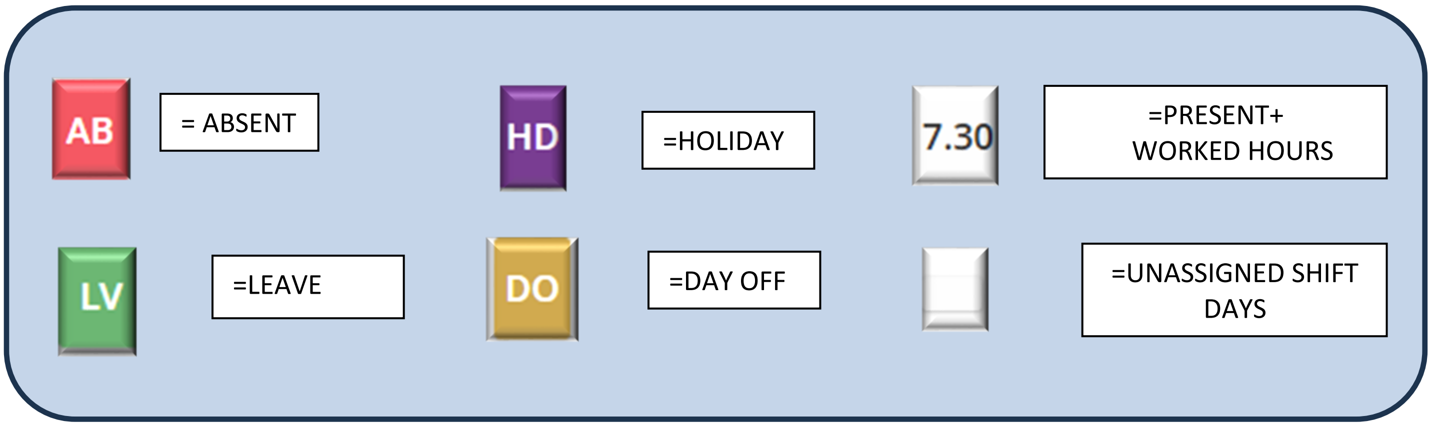
Now,
Step 3: Click o Attendance Status menu.

Note: In above Figure, a user can search details using search filters like departments, employee name, Leave Type, service Type and employee type.

22 New Depart

The Department-wise Attendance sub module under Status module in the HRIS system allows users to view daily attendance details of its subordinate employees with multiple filter options for precise tracking. Users can filter

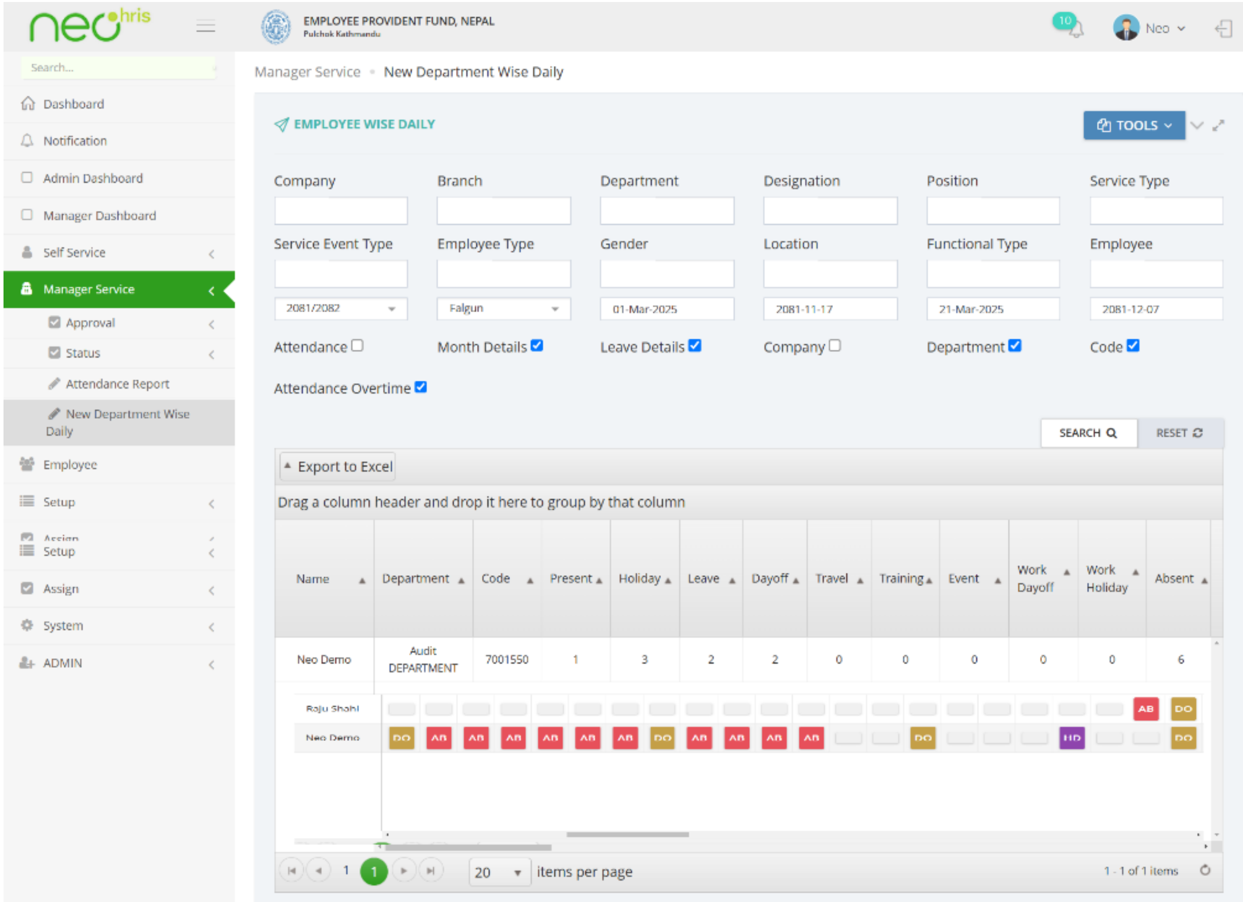
data by attendance status, specific month, leave details, company, department, employee code, and overtime records. This enables managers to efficiently monitor and analyze workforce attendance trends. The module ensures accurate and streamlined reporting for better decision-making. Here User can also export details to excel sheet by clicking on the “Export” button.
We can view following listed acronyms in the reports:



Step 1: Navigate your mouse over manager Service menu and click on it.
Step 2: Click on the menu called Status located under Manager Service. As previous status sub module, following four Sub module will be displayed under STATUS menu:

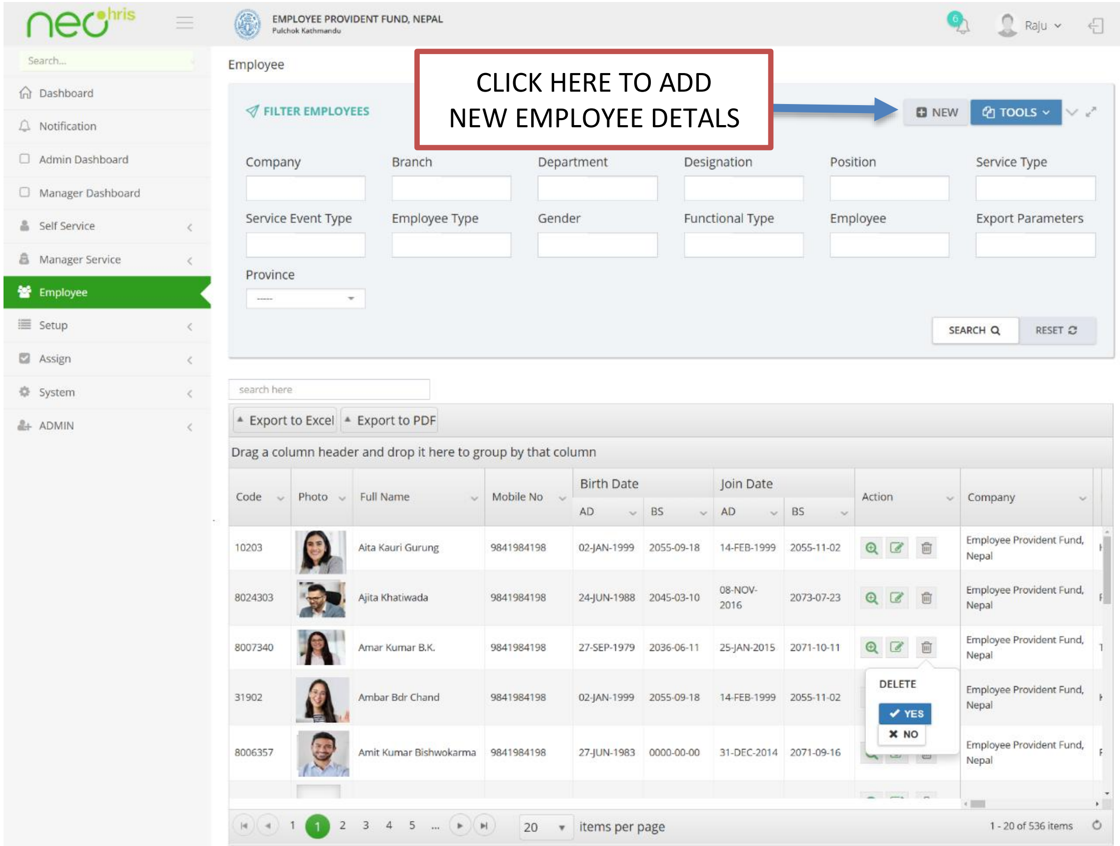
- Leave Status
- Attendance Status
- Attendance Report
- New Department wise daily Report

Now,
Step 3: Click o New Department wise Daile Report Menu. Following page will be displayed.


EMPLOYEE PROVIDENT FUND, NEPAL
Search...
Dashboard
Notification
Admin Dashboard
Manager Dashboard
Self Service
Manager Service
Approval
Status
Attendance Report
New Department Wise Daily
Employee
Setup
Assign
System
ADMIN
Manager Service
New Department Wise Daily
EMPLOYEE WISE DAILY
TOOLS
Company
Branch
Department
Designation
Position
Service Type
Service Event Type
Employee Type
Gender
Location
Functional Type
Employee
2081/2082
Falgun
01-Mar-2025
2081-11-17
21-Mar-2025
2081-12-07
Attendance
Month Details
Leave Details
Company
Department
Code
Attendance Overtime
SEARCH
RESET
Export to Excel
Drag a column header and drop it here to group by that column
Name
Department
Code
Present
Holiday
Leave
Dayoff
Travel
Training
Event
Work Dayoff
Work Holiday
Absent
Neo Demo
Audit DEPARTMENT
7001550
1
3
2
2
0
0
0
0
0
6
Raju Shahi
Neo Demo
20
items per page
1 - 1 of 1 items

23 Employee

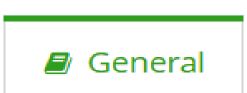
The Employee Module within the HRIS designed as a one stop solution for automating employee detail capturing particularly to facilitate the entry of employees that have just been recruited. They can also assist to edit employee records as needed which is helpful in ensuring that data is accurate and up to date. Deletion of employee detail is possible from the UI, however it is not advisable, because deletion only happens at user interface level, instead updates should be facilitated from the Service status module. This module has advanced search and filtering features that enable users to search for employee records using such filters as company, employee name or type, branch, department, designation, position, service type, gender, function type, and even the export parameters. This capability assists in employee record management while retaining the accuracy, integrity, and accessibility of the stored data.



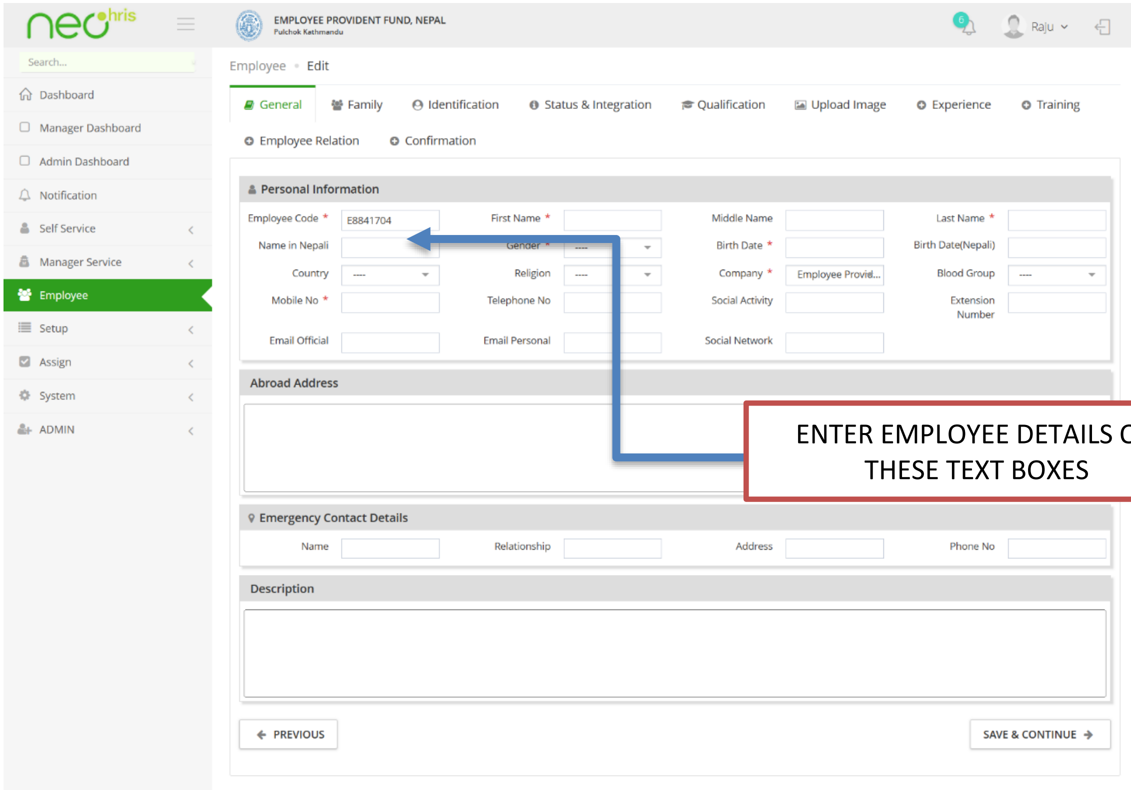
Please follow the following steps to access the module:

Step 1. Click on the left vertical menu panel labeled as Employee.
Step 2: Click on the button named NEW placed at the upper right side of the screen. Now a new page for entering employee details as shown in the following figure will be displayed.

Note: A menu Tab will be displayed where a manager or ADMIN can keep on entering r employee details and click SAVE & CONTINUE button for next tab to continue.



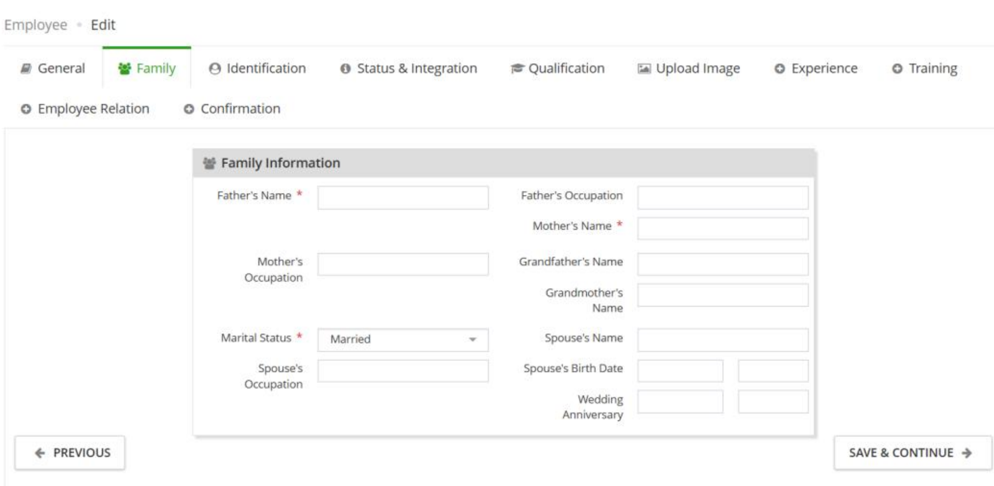
Now the following page will be opened:

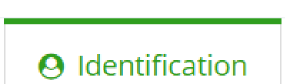


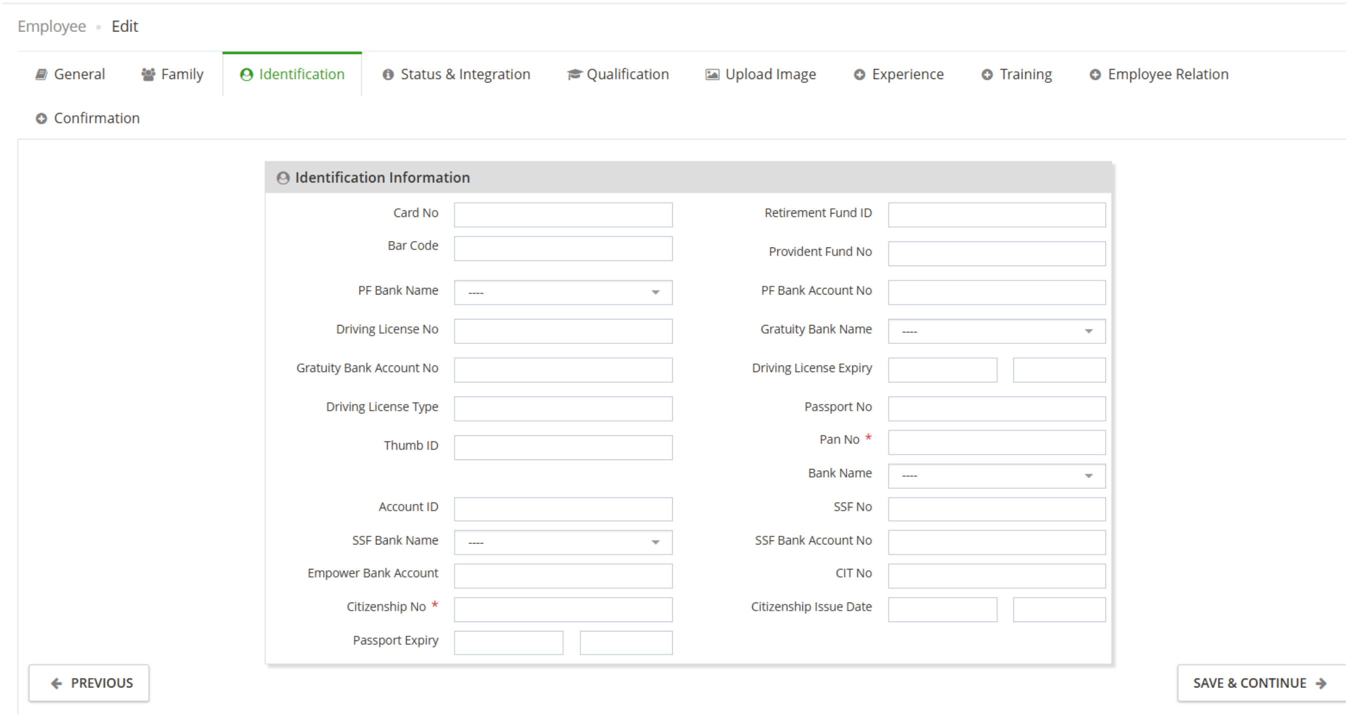
Step 3: Enter all the information like personal details, Abroad Address, Emergency Contact details, Description of an employee and click SAVE & CONTINUE button available at the bottom right corner of the page.
Step 4: After clicking save & continue, following page of Family tab menu will be opened;

25Family

Here, user can enter all the family details like father's name, mother's name, family occupations, marital status family birth date etc. and click SAVE & CONTINUE again.







Based on the above image, here's what you can enter employee identification details and save the information:

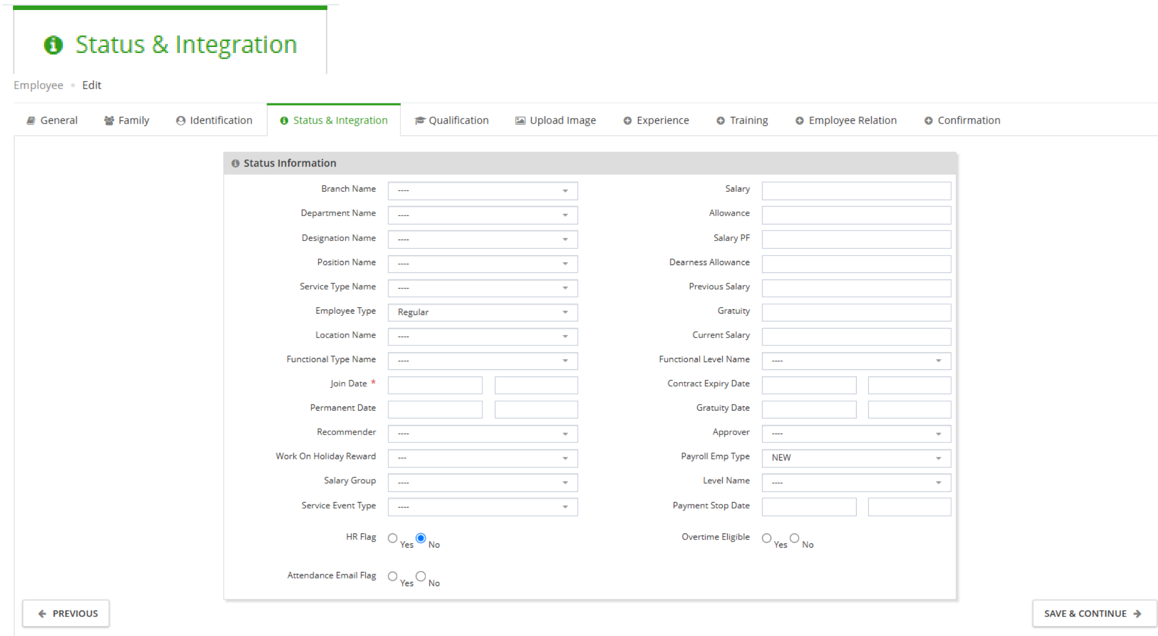
Steps for Data Entry:

1. **Card No** – Enter the employee's unique card number.
2. **Bar Code** – Input the barcode associated with the employee (if applicable).
3. **PF Bank Name** – Select the employee's Provident Fund (PF) bank from the dropdown list.
4. **Driving License No** – Enter the employee's driving license number.
5. **Gratuity Bank Account No** – Provide the gratuity bank account number.
6. **Driving License Type** – Specify the type of driving license.
7. **Thumb ID** – Input the thumb ID used for biometric identification.
8. **Account ID** – Enter the employee's unique account identifier.
9. **SSF Bank Name** – Choose the bank associated with the employee's Social Security Fund (SSF).
10. **Empower Bank Account** – Provide the employee's bank account for financial benefits.
11. **Citizenship No (Required)** – Enter the employee's citizenship number.
12. **Passport Expiry** – If applicable, enter the expiry date of the passport.
13. **Retirement Fund ID** – Input the retirement fund ID for the employee.
14. **Provident Fund No** – Enter the provident fund number.
15. **PF Bank Account No** – Provide the bank account number linked to the PF.
16. **Gratuity Bank Name** – Select the gratuity bank name.
17. **Driving License Expiry** – Enter the expiry date of the driving license.
18. **Passport No** – Input the passport number if applicable.
19. **Pan No (Required)** – Enter the employee's PAN (Permanent Account Number).
20. **Bank Name** – Select the employee's primary bank.
21. **SSF No** – Enter the Social Security Fund number.
22. **SSF Bank Account No** – Provide the bank account number linked to SSF.
23. **CIT No** – Input the employee's Citizen Investment Trust number.
24. **Citizenship Issue Date** – Enter the issue date of the citizenship document.

Saving the Data:

Once all the required fields are filled in:

- Click the **"SAVE & CONTINUE"** button at the bottom right to save the data and proceed to the next step.



In this Status & Integration this tab user with admin user right have to enter all official details as mentioned below;

Steps for Data Entry:

Employee Status Information:

1. **Branch Name** – Select the branch where the employee is assigned.
2. **Department Name** – Choose the department in which the employee works.
3. **Designation Name** – Select the employee's designation.
4. **Position Name (Level)** – Enter the specific position held by the employee.
5. **Service Type Name** – Choose the type of service (e.g., contractual, permanent).
6. **Employee Type** – Set the employee type (e.g., Regular, Contract).
7. **Location Name** – Enter the employee's work location.
8. **Functional Type Name** – Specify the functional type.
9. **Join Date (Required)** – Enter the date the employee joined the organization.
10. **Permanent Date** – If applicable, provide the date the employee became permanent.
11. **Recommender** – Select the person who is recommender of the employee.
12. **Work On Holiday Reward** – Choose the reward type for working on holidays.
13. **Salary Group** – Select the employee's salary group.
14. **Service Event Type** – Specify any service-related event type.
15. **HR Flag** – Choose **Yes** or **No** to indicate whether the employee is part of the HR team.
16. **Attendance Email Flag** – Select **Yes** or **No** to enable or disable attendance-related email notifications.

Salary & Compensation Details:

17. **Salary** – Enter the employee's salary amount.
18. **Allowance** – Specify any additional allowances.
19. **Salary PF** – Input the provident fund amount deducted from the salary.
20. **Dearness Allowance** – Enter the dearness allowance if applicable.
21. **Previous Salary** – Provide details of the employee's salary before the latest update.
22. **Gratuity** – Enter the gratuity amount.
23. **Current Salary** – Specify the employee's latest salary amount.
24. **Functional Level Name** – Select the employee's functional level.
25. **Contract Expiry Date** – If the employee is on a contract, enter the expiration date.
26. **Gratuity Date** – Input the gratuity eligibility or disbursement date.
27. **Approver** – Choose the authorized approver for salary or employment details.

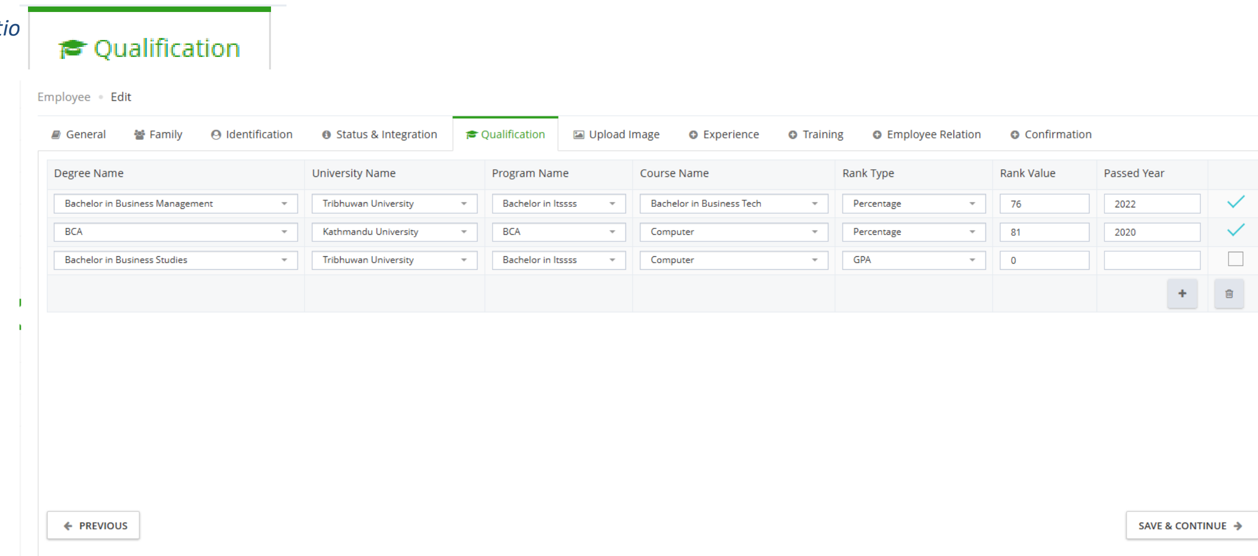
28. **Payroll Emp Type** – Set the payroll employee type (e.g., NEW, EXISTING).
29. **Level Name** – Enter the employee's level in the organization.
30. **Payment Stop Date** – If applicable, enter the date when payments should stop.
31. **Overtime Eligible** – Select **Yes** or **No** to indicate if the employee is eligible for overtime pay.

Saving the Data:

Once all the required fields are filled in:

- Click the **"SAVE & CONTINUE"** button at the bottom right to save the data and proceed to the next step.

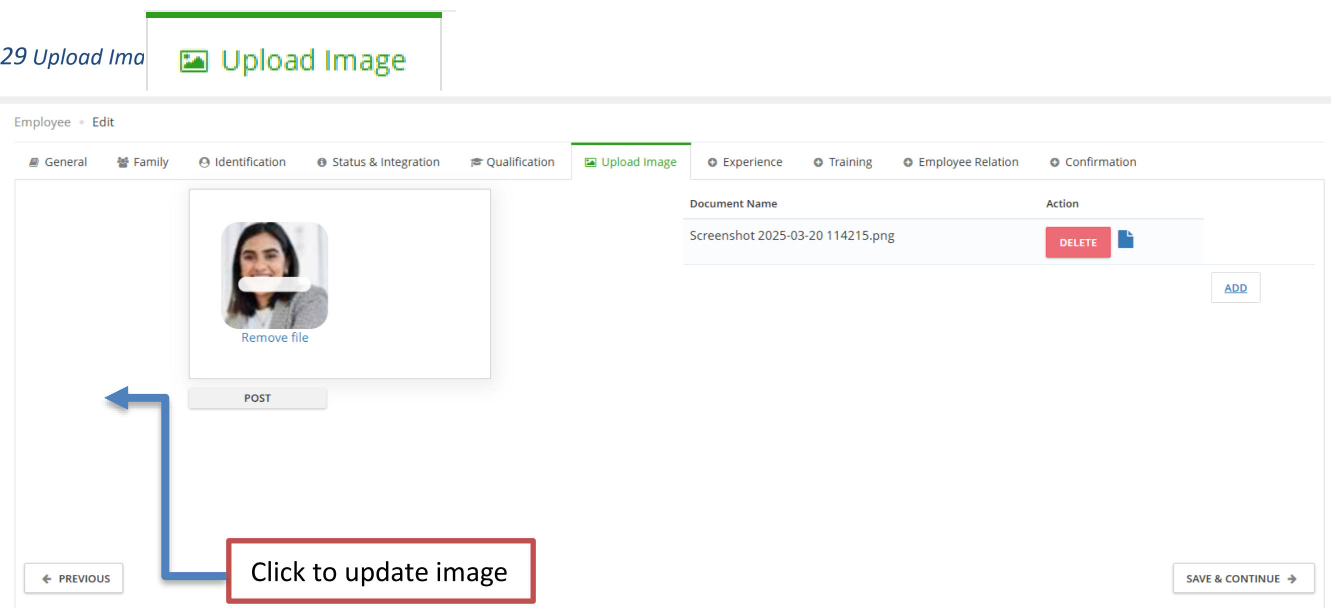
28 Qualificatio



In this Tab, User has to enter all the academic qualification associated with the employee

- Click on the Tick button shown at the right-hand side of the page
- Clock on the + sign button to add the details.
- Click the **"SAVE & CONTINUE"** button at the bottom right to save the data and proceed to the next step.

29 Upload Ima



Steps to Upload an Image:

1. **Click on the Image Upload Box**
   - Locate the **"Upload Image"** tab in the navigation menu.
   - Click in **the middle of the image upload box** to open the file selection window.
2. **Choose the Image File**
   - A file explorer window will appear.

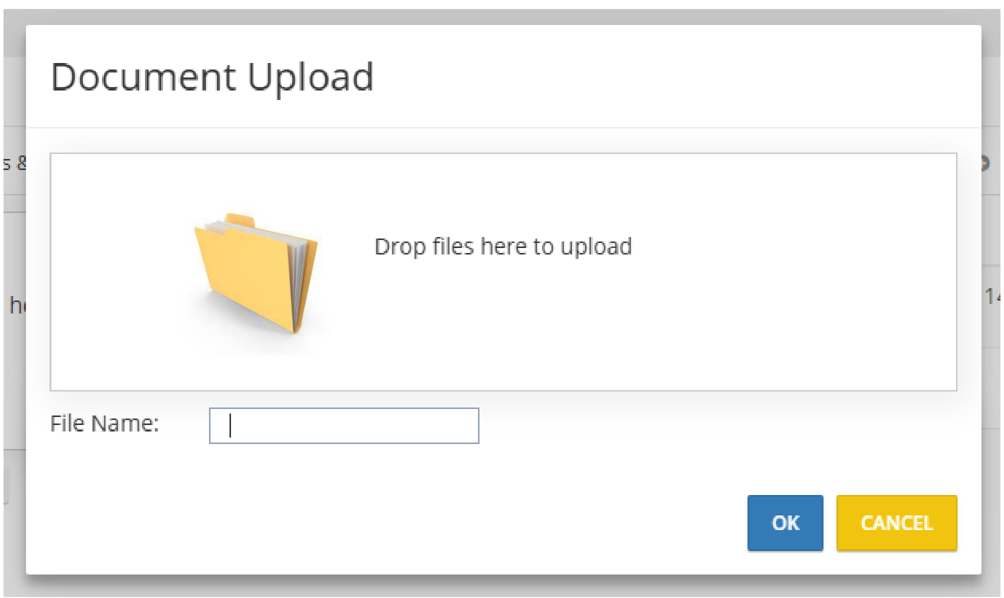
- Navigate to the folder where your image is stored.
- Select the desired image file.

3. **Click "Open"**
   - After selecting the image, click the **"Open"** button to confirm.
4. **Upload Process**
   - The selected image will now start uploading.
   - Wait for the upload process to complete.
   - Once uploaded successfully, the image will be displayed in the preview section.
   - Click POST button

NOW Steps to Upload a Document:

1. **Click on the Document Upload Box**
   - Navigate to the **document upload section** in the system.
   - Click in the **middle of the document upload box** to open the file selection window.
2. **Choose the Document File**
   - A file explorer window will appear.
   - Navigate to the folder where your document is stored.
   - Select the desired document file (PDF, Word, Excel, etc.).
3. **Click "OK"**
   - After selecting the document, click the **"OK"** button to confirm.
4. **Upload Process & Preview**
   - The selected document will now start uploading.
   - Once the upload is complete, the document **will be shown in the preview box**.
5. **Click "ADD" Button**
   - Click the **"ADD"** button to finalize the document upload.

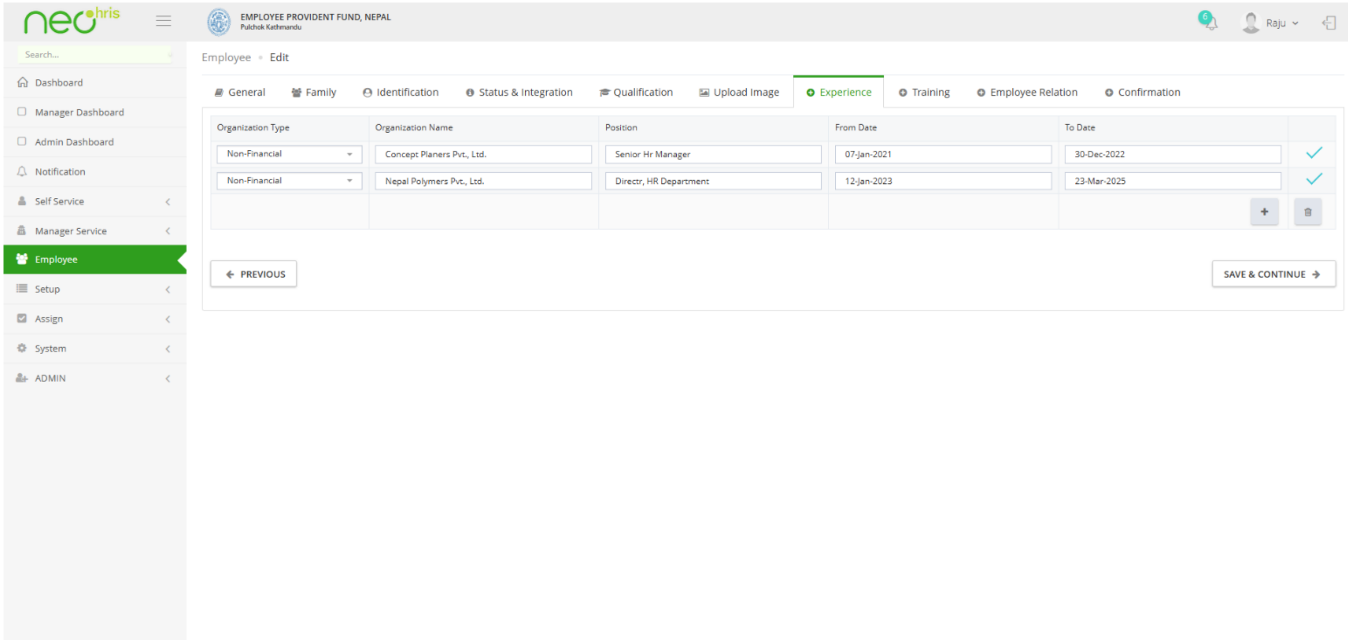
     Upload more documents



6. Click SAVE & CONTINUE FOR NEXT PROCESS.

Experience

Employee Work Experience Information:



It is essential for the HR department to follow these procedures when entering an employee's experience details in the system.

Step 1.: Go to the Experience Details Tab Section

Step 2.: Input all information concerning experience.

- Complete all mandatory fields, which include:
  - Previous Employer Details (Company)
  - Position Held
  - Employment Dates (From-To)
  - Duties of the Position

Step 3.: Click the" ✓ "button.

Where employees have several previous experiences, click the **+** button to provide more records.

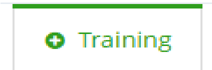
Step 4.: Review and Confirm

- Check that all information provided is complete and correct.

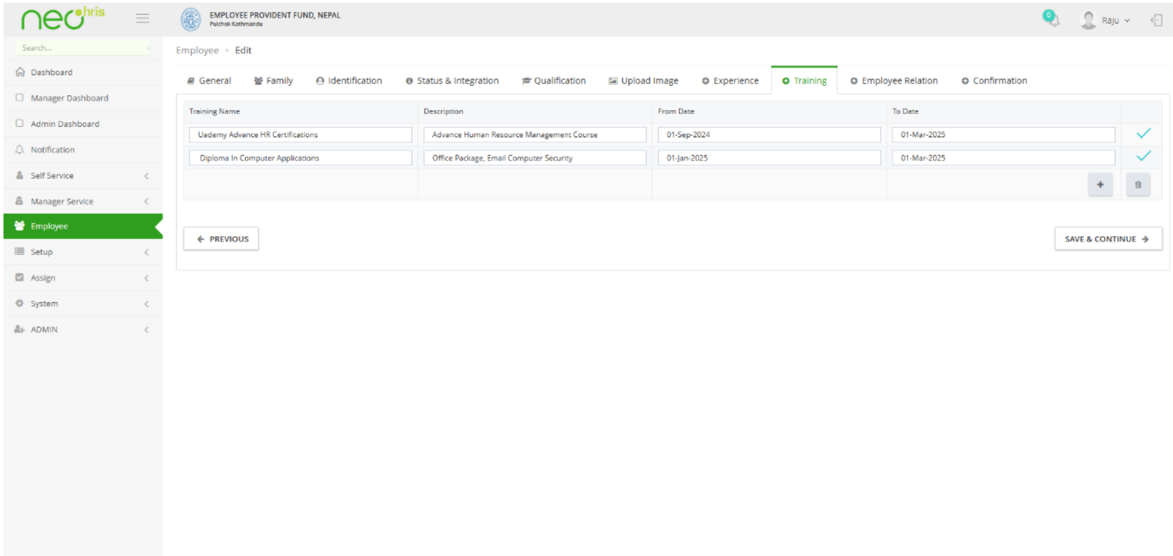
Step 5.: Save and Continue

- To advance forward to the next section of employee data entry, click Save & Continue.

31 Training



By following these steps, the employee's experience details will be appropriately captured into the HR system.



Instruction for Entering Employee's Trainings:

The HR department should follow these steps to enter an employee's training and certification details accurately:

Step 1.: Navigate to the Trainings Tab Section

Step 2 : Enter Training/Certification Information

- Fill in the required details such as:
  - Training/Certification Name
  - Training Descriptions.
  - Training Completion Date (From – To Date)

Step 3: Click on the "+" Button

- If the employee has multiple trainings or certifications, click the **"+"** button to add more entries.

Step 4 : Upload Supporting Documents

- During the **Image Upload** section, ensure that relevant training certificates or documents are uploaded as proof.

Step 5 : Review and Confirm

- Ensure that all entered details and uploaded documents are accurate before proceeding.

Step 6 : Save and Continue

- Click **"Save & Continue"** to proceed to the next section of employee data entry.

Note: It is mandatory to upload relevant training certificates in the **Image Upload** section to complete the record.

32 Employee Re

Step-by-Step Instructions for Entering Employee Relations Information

The HR/Admin department should follow these steps to accurately enter an employee's relation details:

Step 1.: Navigate to the Employee Relations Section

- Click on the **"Employee Relations"** tab.

Step 2.: Enter Relation Details

- **Select Relation Type** from the dropdown (e.g., Spouse, Child, Father, Mother, Sister, etc.).

- **Enter the Name** of the relative.
- **Enter Date of Birth (DOB)** of the relative.
- **Provide Dependency Information** (if applicable, such as whether the relative is financially dependent on the employee) by selecting Yes/No options.
- **Enter Nomination Details** (if applicable, for benefits, insurance, or other nominations) by selecting Yes/No options.

Step 3.: Click the "+" Button

- If the employee has multiple relatives to be recorded, click the **"+"** button to add more entries.

Step 4.: Delete an Entry (If needed)

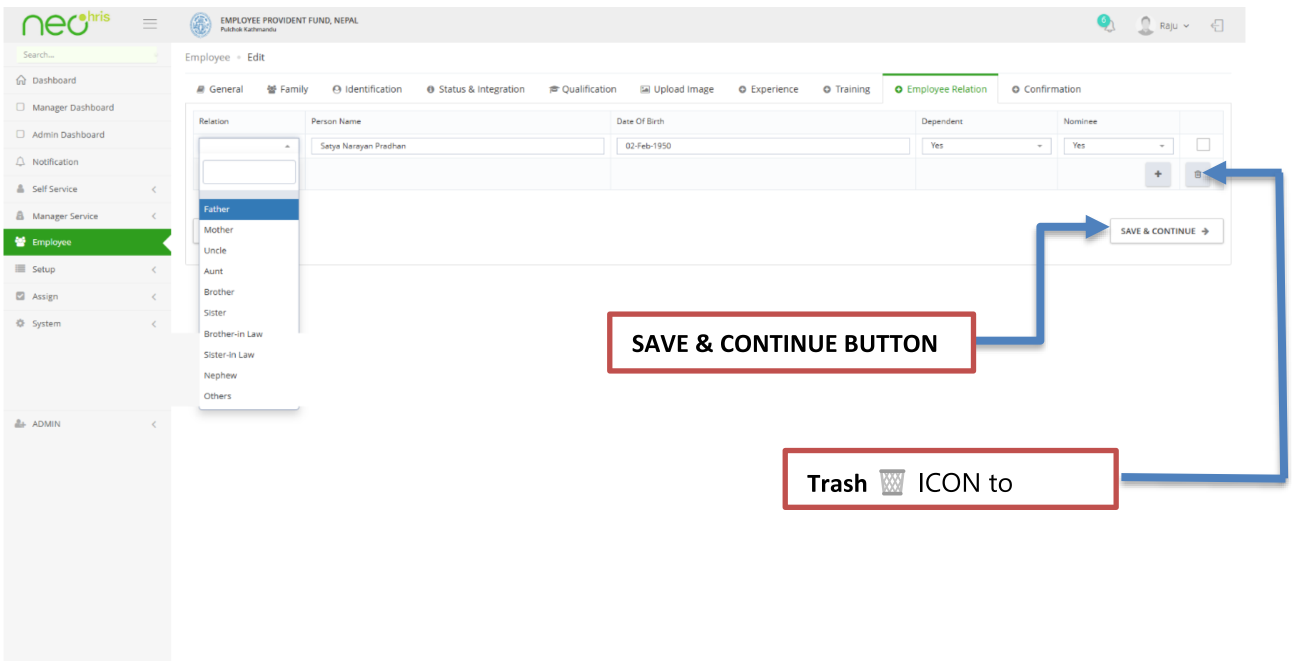
- To remove a mistakenly entered relation, click the **Trash** button next to the respective entry.

Review and Confirm

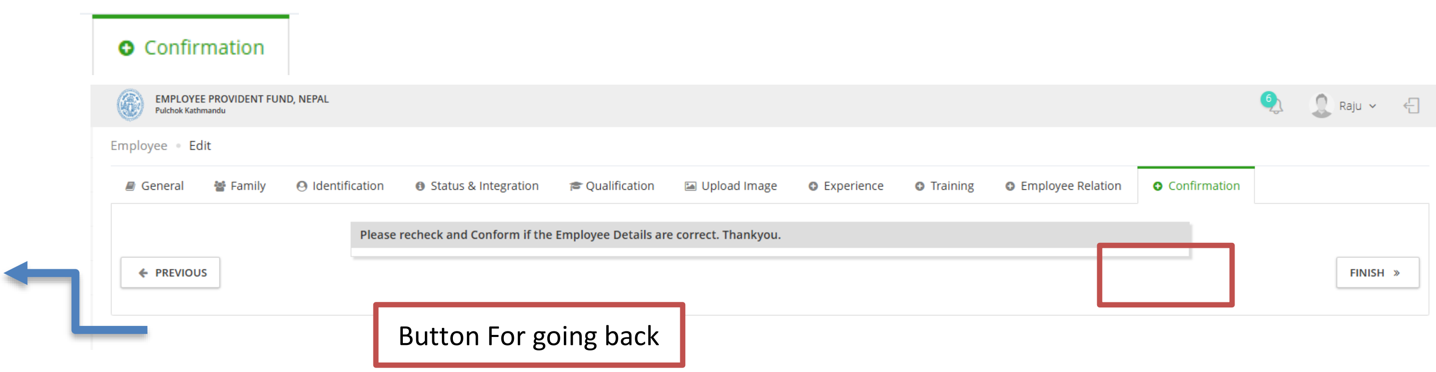
- Verify that all entered details are accurate before proceeding.

Step 5. : Save and Continue

- Click **"Save & Continue"** to proceed to the next section of employee data entry.



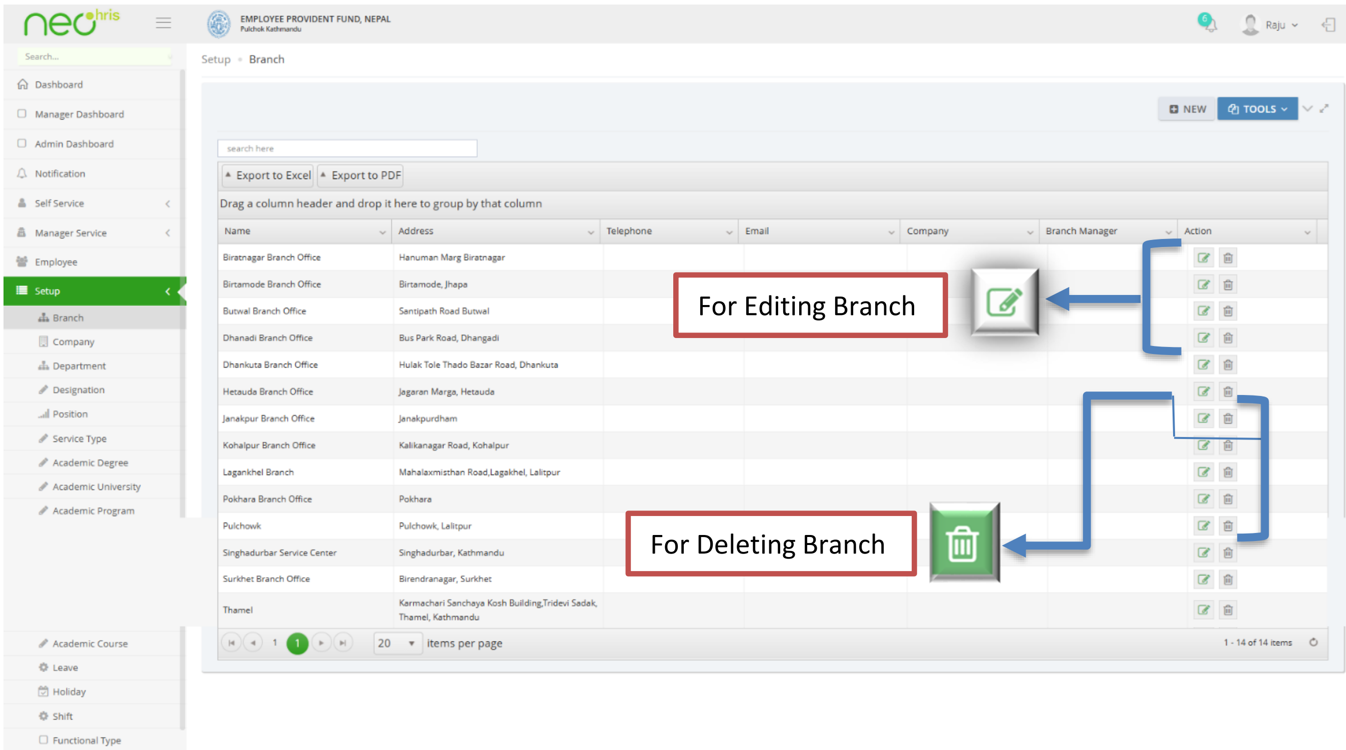
Following these above steps ensures that all employee relation details are correctly recorded in the HR system.

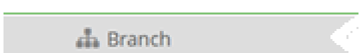


Here After entering all employee's details, user has to confirm all the necessary details of an employe, after which, accurate details are entered into the HR system.

Step 1: So, Click Finish button for completing details entry of an employee.

The Setup Module of the HRIS system gives administrators a single platform to set up fundamental organizational elements which results in improved workforce operations. Through this module administrators gain full control to maintain both Company branch structures and create Departments and establish Designations along with defining Employee positions. Employees can be sorted according to Service Types (permanent, contractual, temporary) through this functionality which also supports setting parameters for Academic Degree and University addition together with Course Program input for records. Admin users have the ability to prepare company policy friendly leave policies and shift schedules. The module consists of Functional Type features which support employee resignation, retirement and transfer operations settings. The system shows dynamic updates from Setup menu configurations across all related HR processes for proper data consistency.

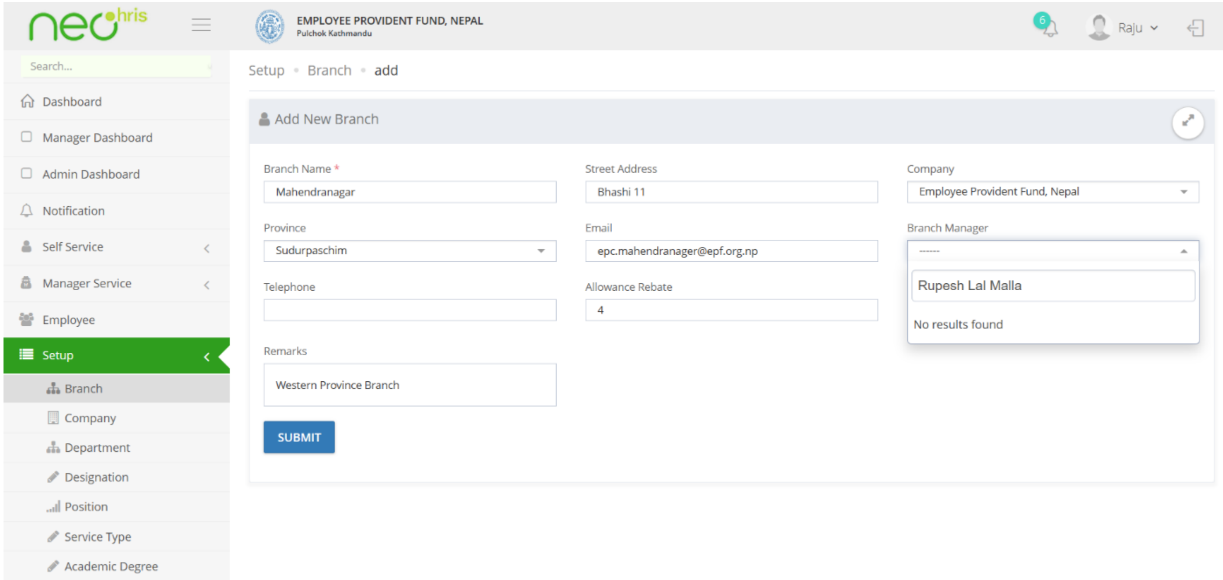




Step 1.: Navigate you mouse over Setup menu and click on it.
Step 2.: Click on sub menu labeled as “Branch “.
Now a new page will be opened where admin from where he can configure new branch.
Step 3.: Click on the NEW labeled button.
After clicking on it, another page is opened where admin will have interface to enter Branch details for addition of BRANCH.
Step. 4: According to the field provided type name of new Branch in Branch text box
Step 5.: Type Street address of branch.
Step 6.: Select Company Name (By default EPF name is shown on drop down box).
Step 7.: Type Contact Telephone name.
Step 8.: Type or Click on the small triangle icon on of Allowance rebate box.

Note: Here Allowance Rebate is amount of refund provided for Managers of the particular branch.

Step 9.: Select radio button for Branch as remote “YES” or “NO” according to its location.
Step10.: Type remarks and Click SUBMIT button.

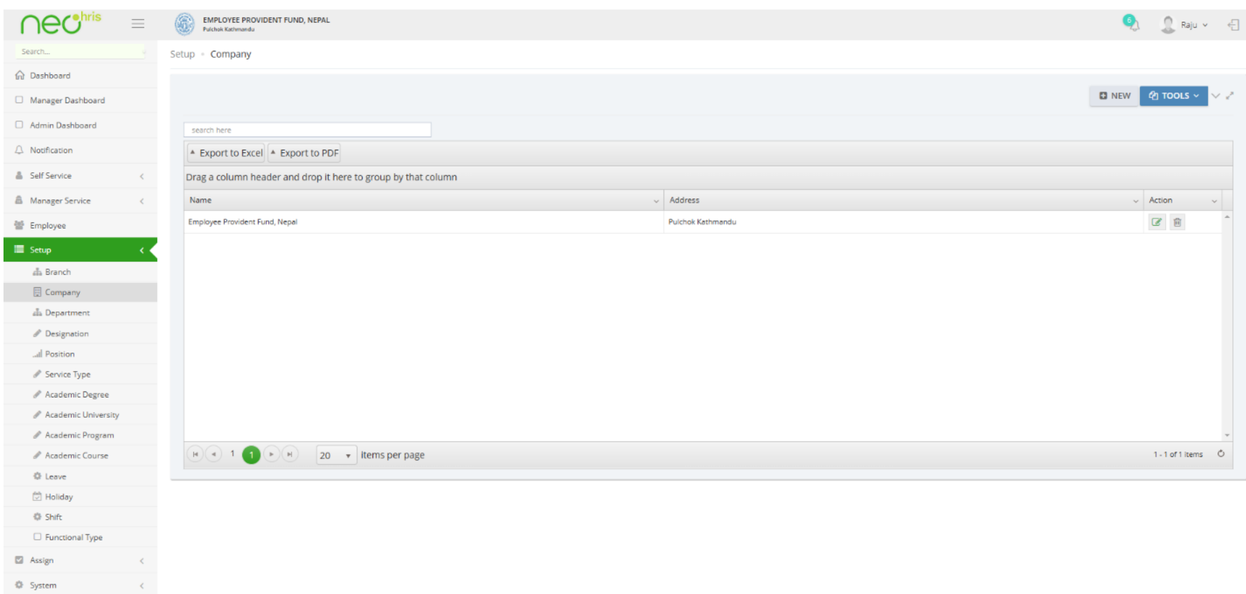


36 Company A

Company

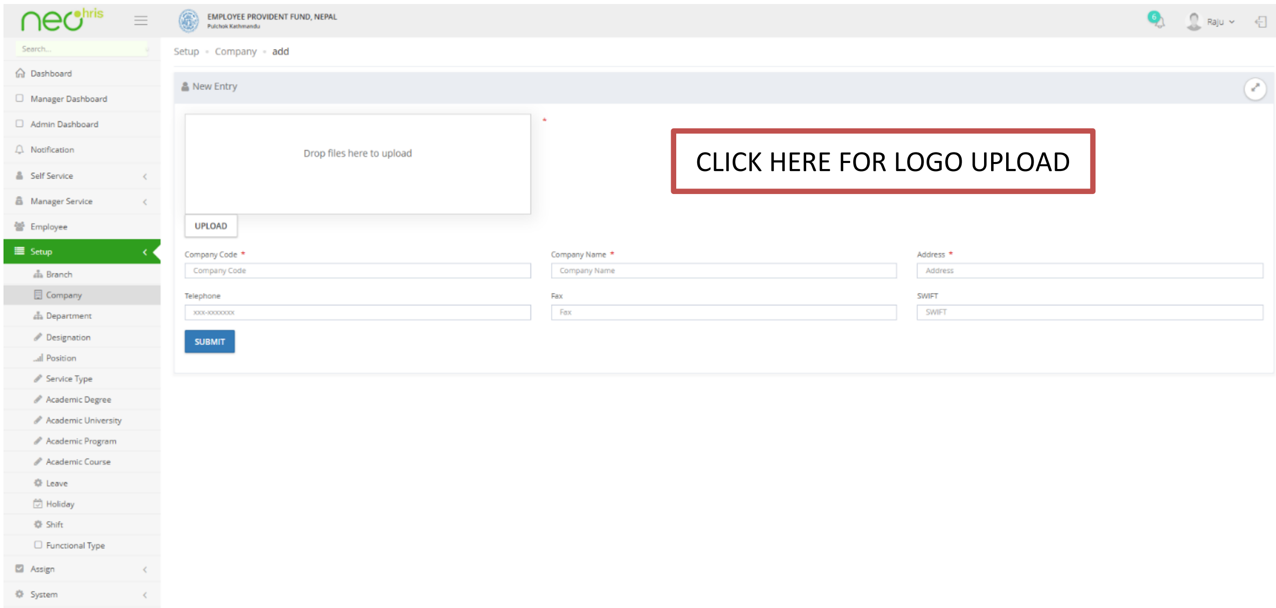
In this submodule of setup, admin can setup Company within which all employees, departments, branches are configured. In order to open Company menu, follow the following steps;

Step 1.: Navigate your mouse over Setup and click on it.
Step 2. : Click its sub menu labeled as COMPANY and now a new page of Company where admin ca setup new company .

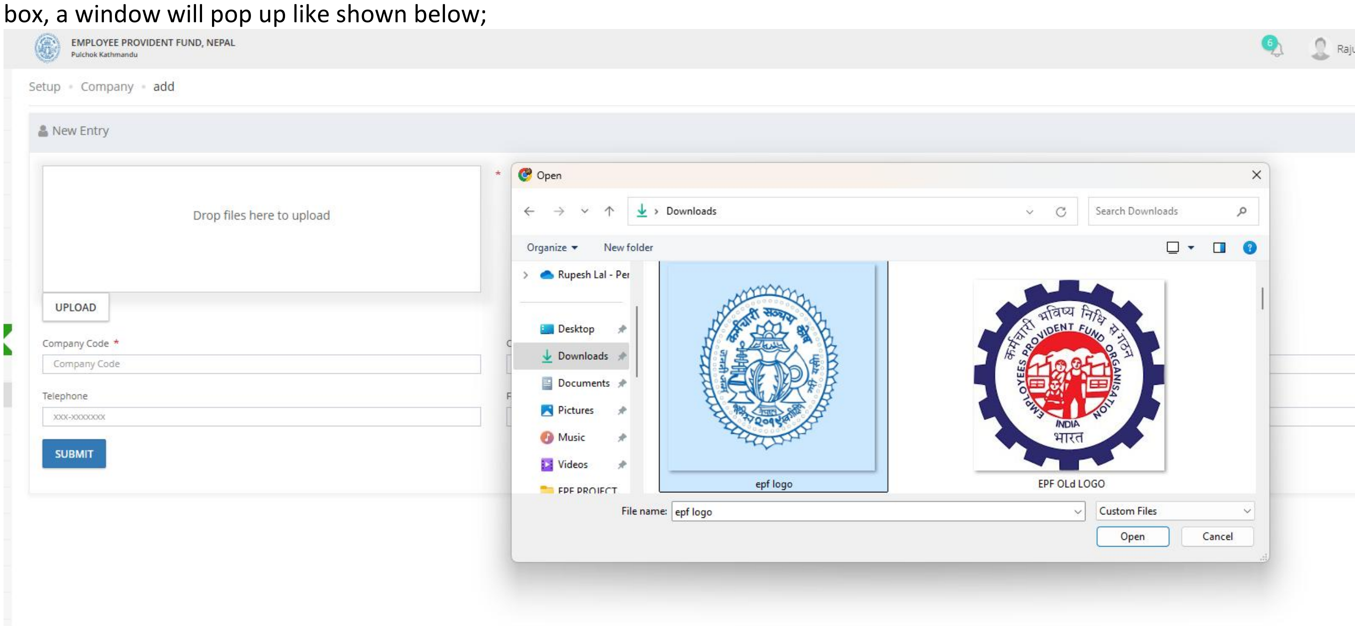


Step 3.: Now Here, Click On the button labeled as NEW which is placed at the upper right-hand side of the screen window.

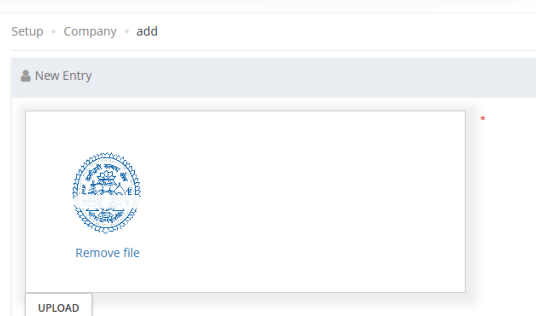
Now a new page will again open where admin can enter company details:



Step 4.: Click on the File Upload box where you can see “Drop Files here to upload”. Now, After clicking on the File Upload box, a window will pop up like shown below;



Step 5: Select the Logo file source path and click on the OPEN button.



Now Uploaded logo will be displayed on the file upload box

Step 6: Now Click on the UPLOAD button to upload logo of the company.

Note: File format for logo to upload must be in Jpeg or Png format.

Step 7.: Type Company details as mentioned below;

Company code inside Company Code
Text box, Company name inside Company Name text Box,
Telephone number inside telephone number text box,
Fax number and swift number it its respective text boxes.

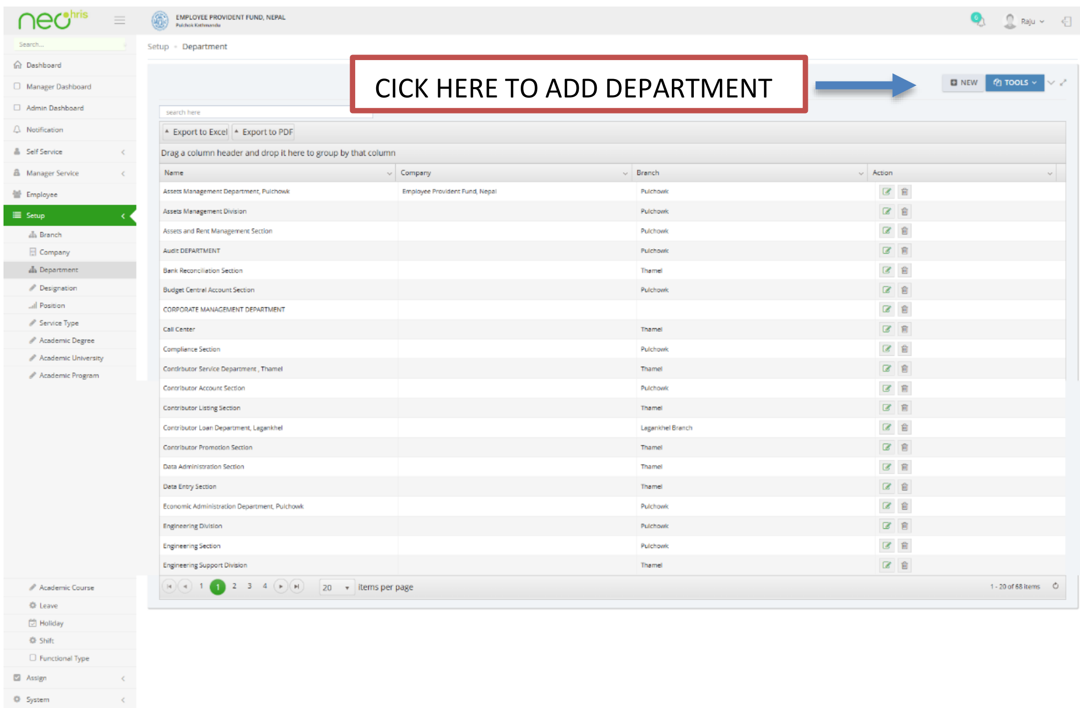
Step 8: Now Click Submit button.

Department

For Department setup, please follow the following steps.

Step 1.: Navigate your mouse over Setup menu and click on the Department sub menu.

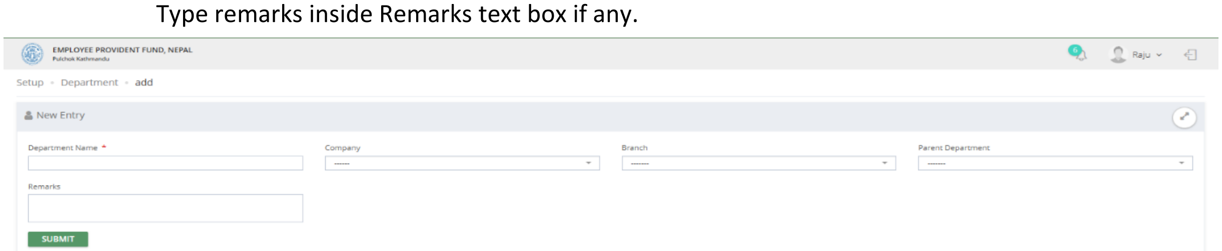
As soon as you click on the sub menu, a page for department setup will be displayed on the right-hand side.



Step 2.: Now Click on the NEW button placed on the upper right-hand side of the page as shown in above figure

Step 3: Now type all the required details as mentioned below:

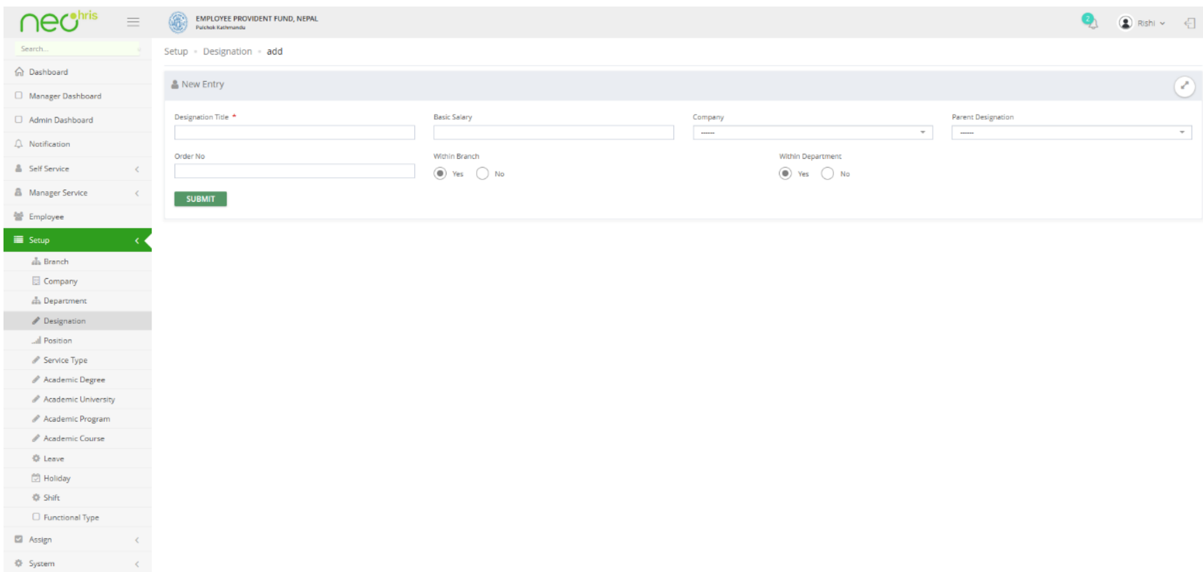
- Department Name inside Department Text Box
  Select Company from Company selection box
  Select its associate branch from Branch selection box
  Select Parent department if applicable otherwise leave as it is if the currently setting department its self is Parent Department.
  Type remarks inside Remarks text box if any.



Step 4.: Click SUBMIT button for submitting the details.

Designation

In this sub module, Admin can add /setup designation of an employee for which we need to follow the following steps
Step 1.: Navigate the mouse over Setup Module and click on the Designation menu placed under Setup module menu.
Step 2.: NOW Click NEW BUTTON.
Step 3: Now type Designation Title Inside Destination title box.
Step 4: Type employee's basic Salary.
Step 5: Type Employee's order number.
Step 6: Choose whether the designated employee should be under Branch or not.
If YES then choose YES option button other choose NO option button.
Step 7: Choose whether the designated employee should be under any Department or not.
If YES then choose YES option button other choose NO option button.



Step 8.: Select Department Name under which this particular designation employee must be placed.
Step 9: Click Submit

Position

In this module, Admin can add the position by entering employee level details, position and WHO substitute details. In order to access the position module, follow the following steps:
Here is a step-by-step guide on how to use the **Position Module** in the HRIS system:

Step 1: Access the Position Sub Module

1. After Logg in to the HRIS system.
2. Navigate to the **Position** module which is placed under Setup Module.
3. Click on the **Edit** option if you want to modify an existing position or click on the **New** to create a new position.

Step 2: Enter Position Details

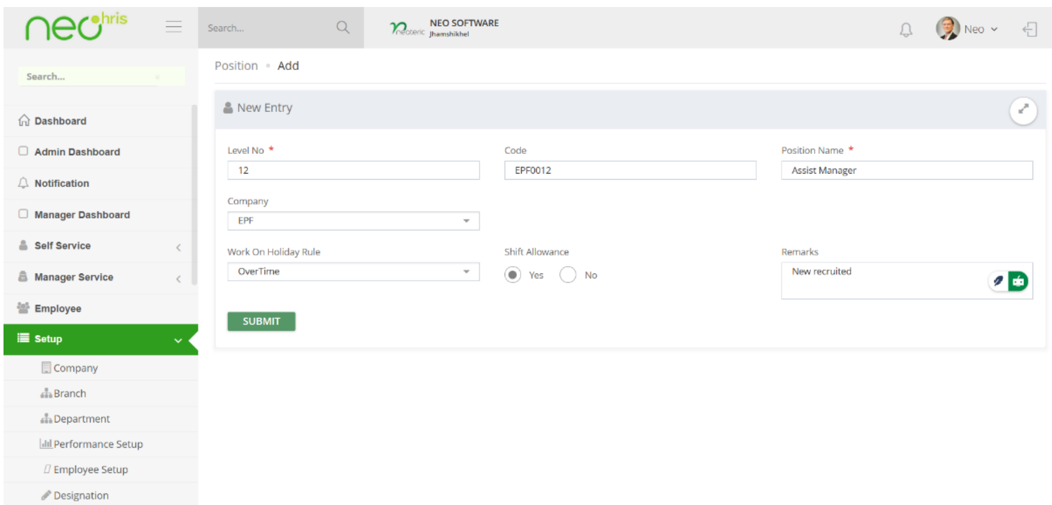
1. **Level No:**
   - Enter the level number for the position (e.g.,1 ,2,3,4….9).
2. **Code:**
   - Input the unique code assigned to this position (e.g., EPF 12221).
3. **Position Name:**

- Provide a title for the position (e.g., Assist manager). This is a required field.

4. **Company:**
   - Select the company from the dropdown list (e.g., Employment Provident Fund.).
5. **Work on Holiday Rule:**
   - Choose the rule applicable when employees work on holidays (e.g., Over Time, Substitute leave). This rule is to provide employee a substitute leave or overtime in in return if he/she works on holiday, as per company policy
6. **Shift Allowance:**
   - Select **Yes** if this position qualifies for shift allowance.
   - Select **No** if it does not.
7. **Remarks:**
   - Enter additional remarks related to this position (e.g., Department Contact person or manager).

Step 3: Submit the Form

1. Review all entered details to ensure accuracy.
2. Click the **SUBMIT** button to save the changes.



41 Service Type

Service Type

The **Service Type** module in the HRIS system allows you to categorize employees based on their employment status, such as permanent, probation, contract, temporary, resigned, or retired.

Step 1: Navigate to the Service Type Module

1. Log in to the HRIS system.
2. On the left sidebar, go to **Setup > Service Type**.
3. Click on **Add** to create a new service type.

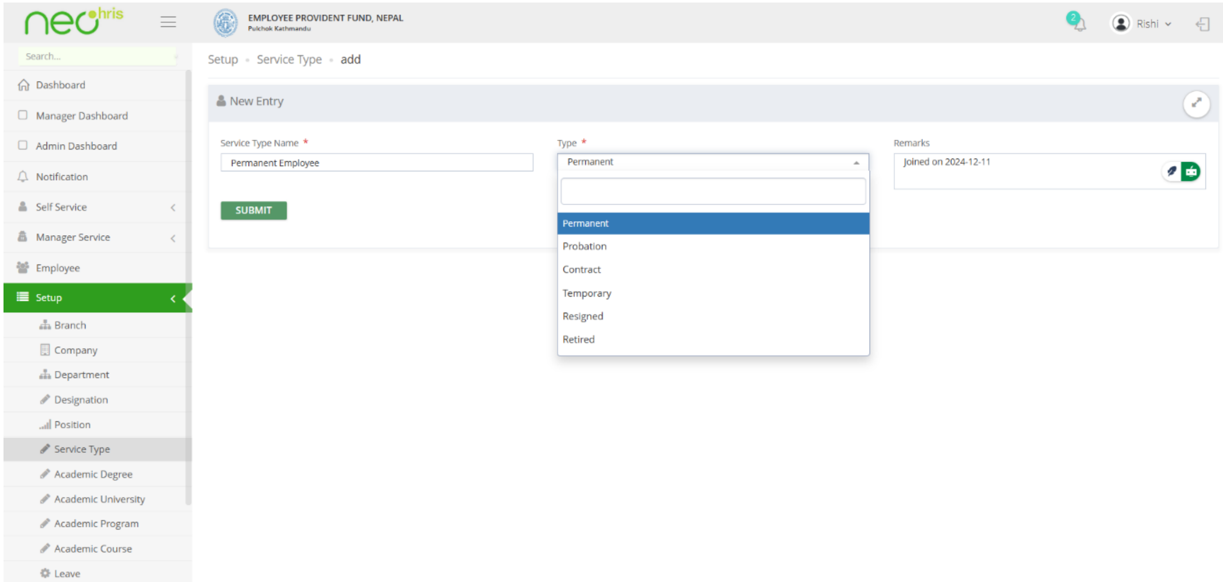
Step 2: Enter Service Type Details

1. **Service Type Name:**
   - Enter a descriptive name for the service type (e.g., "Permanent Employee").
   - This is a required field.
2. **Type:**
   - Select an employment category from the dropdown (e.g., **Permanent, Probation, Contract, Temporary, Resigned, Retired**).
3. **Remarks:**
   - Add any additional notes, such as the joining date (e.g., "Joined on 2024-12-11").

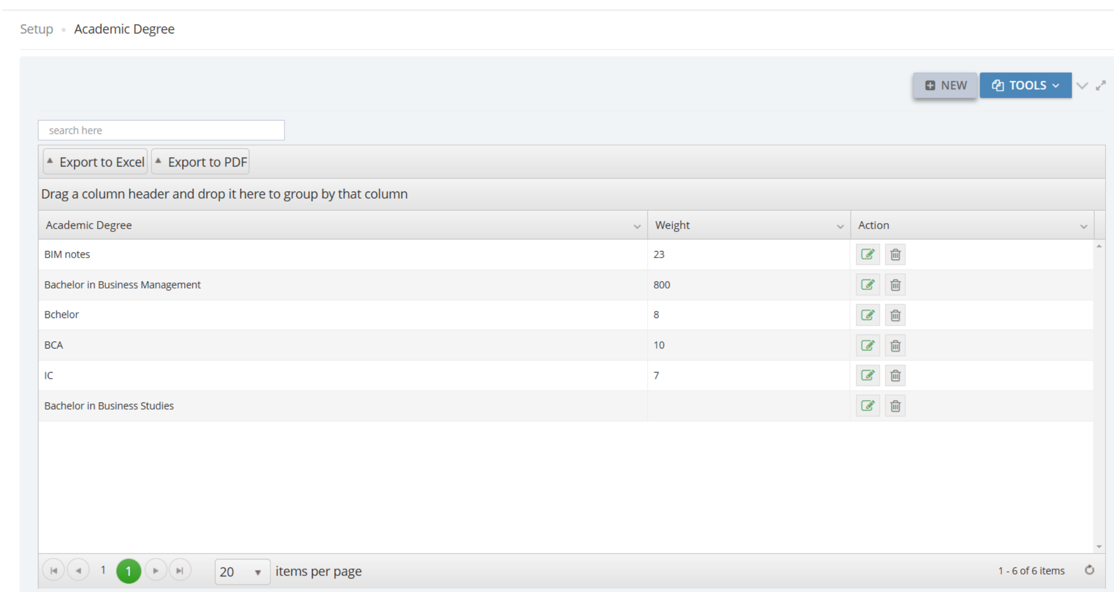
Step 3: Submit the Information

1. Review all the entered details.
2. Click the **SUBMIT** button to save the new service type.

This module helps in organizing employee records efficiently based on their employment type, making HR management smoother.

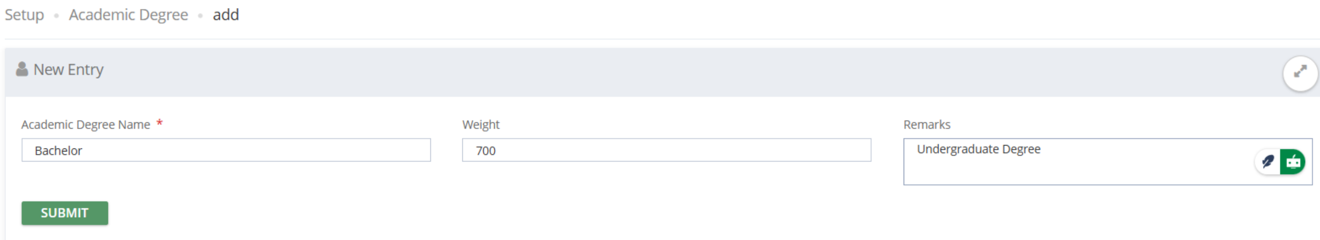


Academic Degree

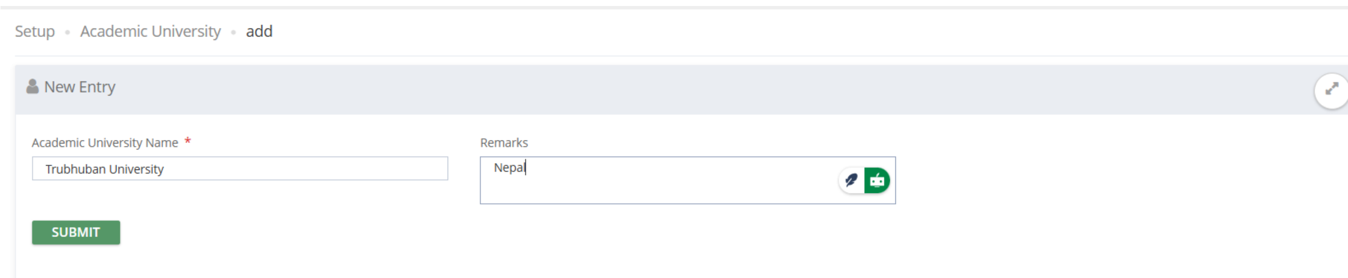


This where employee's academics information is uploaded. In order to do so follow the following steps:

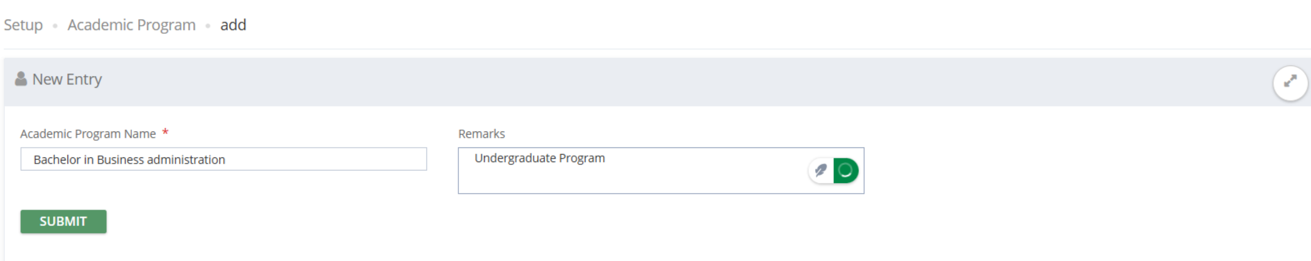
Step 1: Navigate cursor over setup menu and click on the Academic Degree sub menu.
Step 2: Click on the NEW button available on the upper right-hand side of the main page.
Step 3: Type the name of the Degre (e.g. Bachelor, Masters, M.Phil. etc.) and type weightage also with remarks if any.
Step 4: Click Submit button.
(Repeat the process in order to add multiple entries.)
This will now create a structure where admin/HR can later input Employee's academic information on the system.



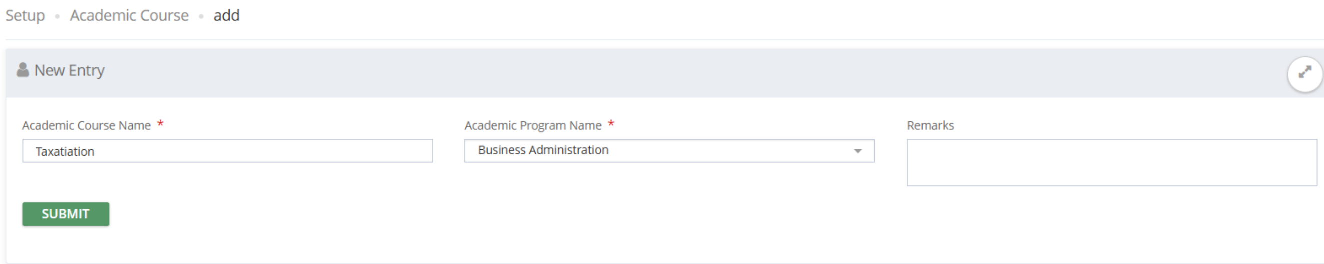
Similarly for Setting Academic University;
Step 1: Click on the Academic University Sub Menu as shown in following figure and
Step 2.: Type Name of University and remarks if any
Step 3: Click Submit button.
(Repeat the process in order to add multiple entries.)



Now for setting up Academic Program;
Step 1: Click on the Academic Program Sub Menu as shown in following figure and
Step 2.: Type Name of Program (e.g. Bachelor in **Human resource Management** or Bachelor in **Business Administration**) and remarks if any
Step 3: Click Submit button.
(Repeat the process in order to add multiple entries.)



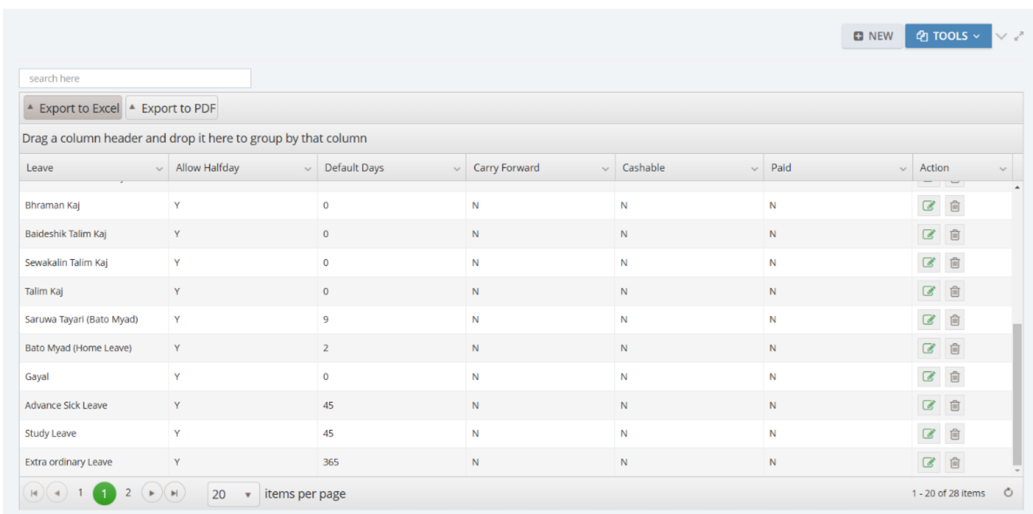
Academic courses:
Step 1: Click on the Academic Courses Sub Menu as shown in following figure and
Step 2.: Type Name of Program (e.g. Taxation, Finance, business Laws etc) and remarks if any
Step 3: Click Submit button.
(Repeat the process in order to add multiple entries.)



Leave

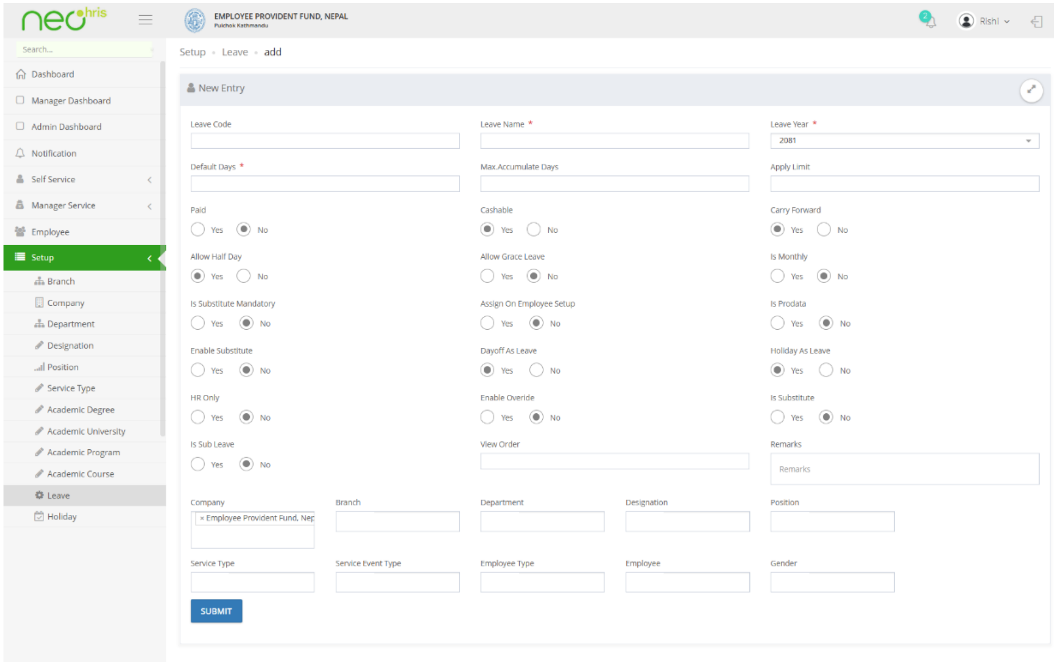
This is another most important sub module where you can define (Setup) different leave types and their attributes. Each leave type can be configured with options such as allowing half-days, setting default leave days, enabling carry forward, and specifying whether the leave is cashable or paid. Administrators can edit or delete leave types using the provided action buttons. Additionally, options to export leave settings to Excel or PDF are available for reporting and analysis.
To set up Leave parameters,

Step 1: Navigate to the Leave sub menu section, following page will now open where all added leave parameters are displayed.



Leave	Allow Halfday	Default Days	Carry Forward	Cashable	Paid	Action
Bhraman Kaj	Y	0	N	N	N	
Baideshik Talim Kaj	Y	0	N	N	N	
Sewakalin Talim Kaj	Y	0	N	N	N	
Talim Kaj	Y	0	N	N	N	
Saruwa Tayari (Bato Myad)	Y	9	N	N	N	
Bato Myad (Home Leave)	Y	2	N	N	N	
Gayal	Y	0	N	N	N	
Advance Sick Leave	Y	45	N	N	N	
Study Leave	Y	45	N	N	N	
Extra ordinary Leave	Y	365	N	N	N	

Now ,
Step 3: Click a button labeled as NEW, place on the upper right and side of the main page.
Now the Setup page will open where admin/HR can setup parameters regarding leave.
Refer following page image;



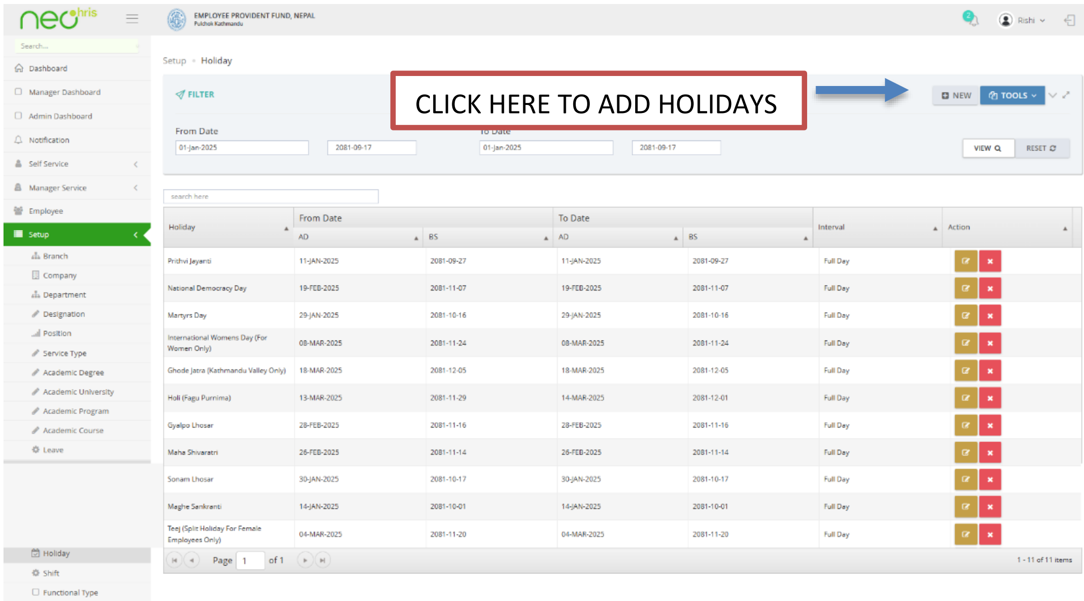
Above screen is for adding a new leave type in an HRIS (Human Resource Information System). The form allows administrators/HR to configure various leave parameters such as:

- **Leave Code & Name**: Unique identifier and descriptive name for the leave type.
- **Leave Year**: Specifies the applicable year for the leave.
- **Default Days & Maximum Accumulate Days**: Defines the number of leave days allocated and the maximum days that can be accumulated.
- **Apply Limit**: Limits how many days in one time leave can be taken.
- **Paid & Cashable**: Determines whether the leave is paid and whether it can be converted into cash.
- **Allow Half Day & Grace Leave**: Specifies if employees can take half-day leave or grace leave.
- **Carry Forward & Pro data**: Defines whether unused leave can be carried forward and if it follows a pro-rata allocation.
- **Substitute & Mandatory Substitute**: Allows setting up substitute employee's approvals when taking leave.
- **Substitute Leave**: It is an accumulated days gained from work on holidays, day off or Official travels
- **HR only:** Restricts leave type visibility to HR.
- **Assignment Options**: Allows linking leave with specific companies, branches, service types, service events, departments, designations, positions, gender and even with individual employee.
- **Other Settings**: Options like assigning leave on employee setup, enabling overrides, and marking holidays as leave.

The form concludes with a **Submit** button to save the leave type configuration. Also, admin can use search box to make easy in searching the leaves.

44 Holiday Set Holiday

It is a structured approach form where admin can define/setup holidays in HRIS system. The UI consists of a **holiday listing** with filters and actions, allowing the admin to add, edit, and delete holidays.
This module allows the admin to define company as well as government holidays, filter them by date, and manage their details.



1.Holiday Definition Fields

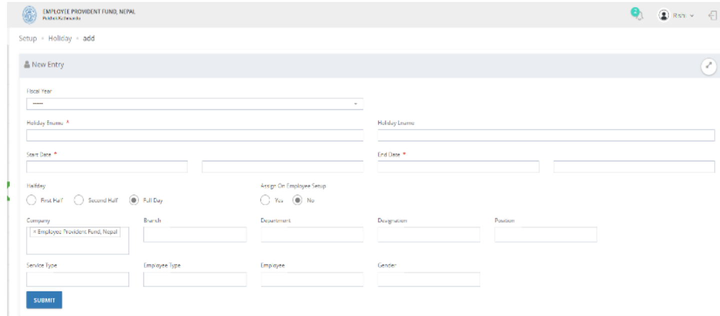
Each holiday entry includes the following fields:

- **Holiday Name** – The name of the holiday (e.g., Holi, Teej).
- **From Date** – The starting date of the holiday (AD & BS format).
- **To Date** – The ending date of the holiday (AD & BS format).
- **Interval** – Defines whether the holiday is a **Full Day** or **Half Day**.
- **Employee Group** (Optional) – Specifies if it applies to all employees or specific groups (e.g., women-only holidays).
- **Branch/Department Specific** – If applicable, the holiday can be set for specific branches or departments.

2. Features & Functionalities

✅ **Add New Holiday**

- Click **"New"** to add a holiday, once click on the Holidays labeled sub menu under Setup Module.
- Input holiday details (Name, Date, Interval, etc.).



- Save the entry by clicking on SUBMIT button.

✅ **Filter Holidays**

- Use the **From Date** and **To Date** fields to filter records.
- Search for holidays using the search bar.

✅ **Edit Holiday**

- Click on the **Edit (✏️) button** next to a holiday.
- Update details such as dates, intervals, or applicability.

✅ **Delete Holiday**

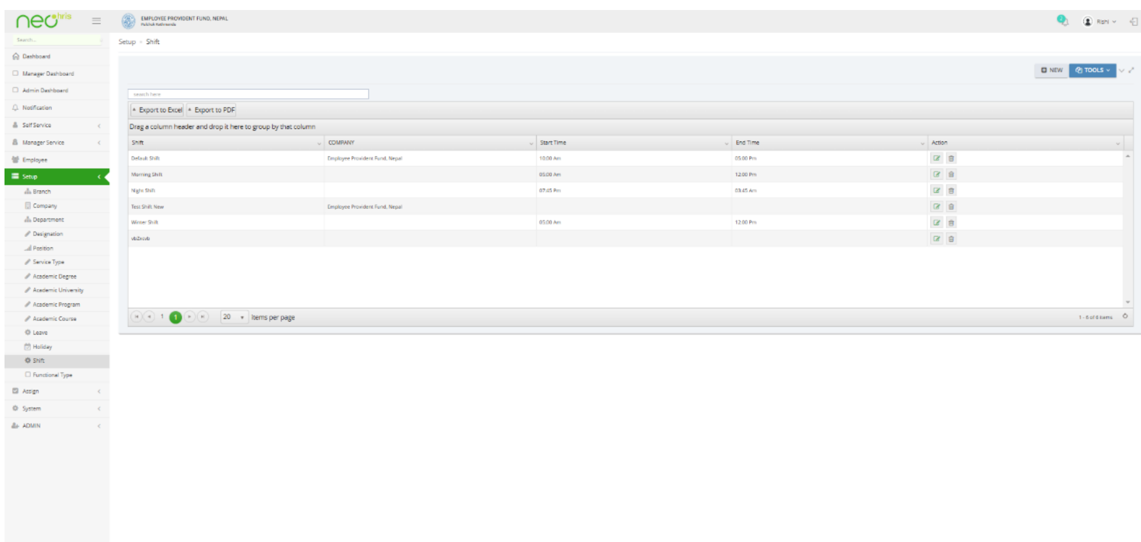
- Click the **Delete (❌) button** to remove a holiday.
- A confirmation prompt ensures that the admin does not delete by mistake.

✅ **Bulk Actions (Fields)**

- Import/export holiday lists.
- Assign holidays to specific employee categories.

Shift

The shift module in the HRIS system allows administrators to configure and manage employee work schedules efficiently. It includes customizable parameters such as shift start and end times, total and actual working hours, grace periods, and half-day thresholds. Administrators can define weekday settings (Normal, Half Day, or Day Off) for all seven days and enable options like night shifts, two-day shifts, or default shifts. The module also supports break time deductions and provides a remarks section for additional notes.



Here is the Step-by-Step Instructions to Set Up the Shift Module in the HRIS System:

Step 1.: Select Company

- Navigate to the *New Entry* page in the HRIS system.
- Select the company name from the dropdown menu under **Company** (e.g., *Employee Provident Fund, Nepal*).

Step 2.: Define Shift Details

- Enter the **Shift Name** and **Shift Alias Name** in their respective fields.
- Specify the **Start Date** and **End Date** for the shift.

Step 3.: Configure Time Parameters

Set up the following time-related parameters:

- **Start Time**: Choose the hour and minute for when the shift begins.
- **End Time**: Select the hour and minute for when the shift ends.

- **Total Working Hour**: Define the total duration of working hours (in hours and minutes).
- **Actual Working Hour**: Specify actual working hours (in hours and minutes).
- **Grace Start Time**: Enter a grace period for late arrivals (in hours and minutes).
- **Grace End Time**: Define a grace period for early departures (in hours and minutes).
- **Half day In Time**: Set up the time threshold for marking half-day attendance.
- **Half day Out Time**: Specify the time threshold for marking a half-day exit.
- **Late In**: Define acceptable late arrival time (in hours and minutes).
- **Early Out**: Set up acceptable early departure time (in hours and minutes).
- **Half Time**: Specify mid-shift break timing.

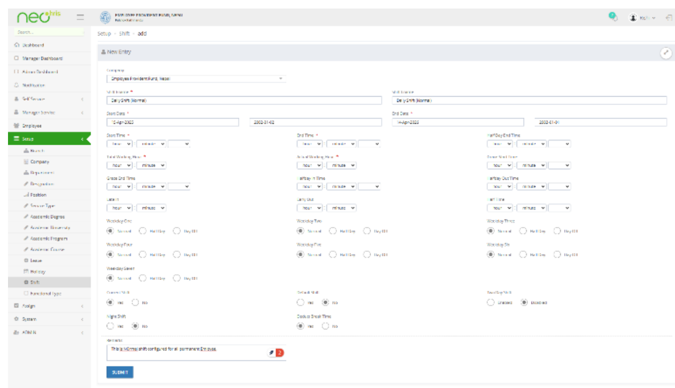
Step 4.: Configure Weekday Settings

For each weekday, admin can select one of three options:

- **Normal**: For full working day.
- **Half Day**: For half working day.
- **Day Off**: For non-working day.

Please repeat this step for all seven weekdays:

- Weekday One (Sunday)
- Weekday Two (Monday)
- Weekday Three (Tuesday)
- Weekday Four (Wednesday)
- Weekday Five (Thursday)
- Weekday Six (Friday)
- Weekday Seven (Saturday)



Step 5.: Additional Shift Settings

Configure additional shift-related options:

- **Current Shift**: Select *Yes* if this is an active shift; otherwise, select *No*.
- **Default Shift**: Choose *Yes* to make this shift default; otherwise, select *No*.
- **Two Day Shift**: Enable or disable two-day shifts as required.
- **Night Shift**: Select *Yes* if this is a night shift; otherwise, select *No*.

Step 6.: Deduct Break Time

Choose whether to deduct break time from total working hours by selecting *Yes* or *No*.

Step 7.: Add Remarks

If necessary, enter additional remarks in the provided text field.

Step 8.: Submit Configuration

Once all fields are filled out correctly after reviewing all the entries for accuracy.

Step 9. : Click on the **Submit** button to save the shift configuration.

Notes: Since Setting up shifts is very vital process for HRIS system, ensuring all parameters aligning with organizational policies before submitting is suggested.

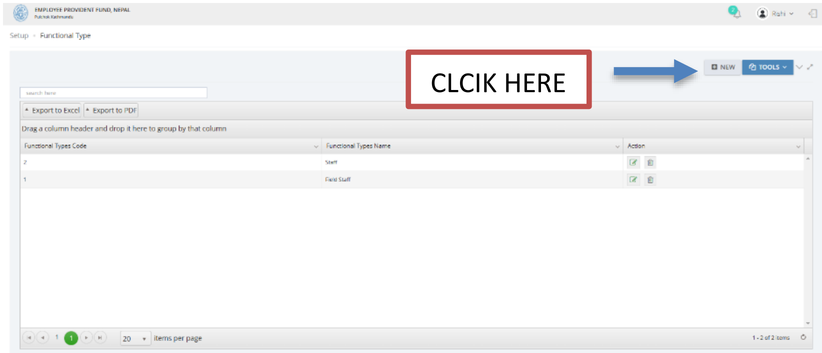
Functional Type

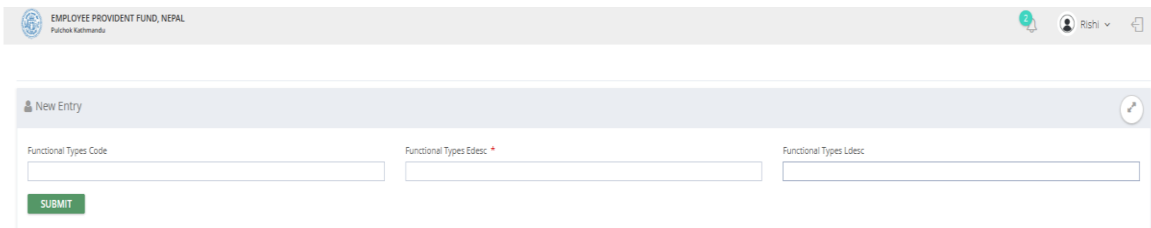
This sub module is required when the its system has to be linked with accounting module of ERP like synergy ERP for automated salary and play roll generation.

Step 1.: Navigate to Functional Type submodule.

Step 2.: Click on NEW button and new page where admin need to enter system functional details.

Step 3.: Click submit button for saving entered parameters.

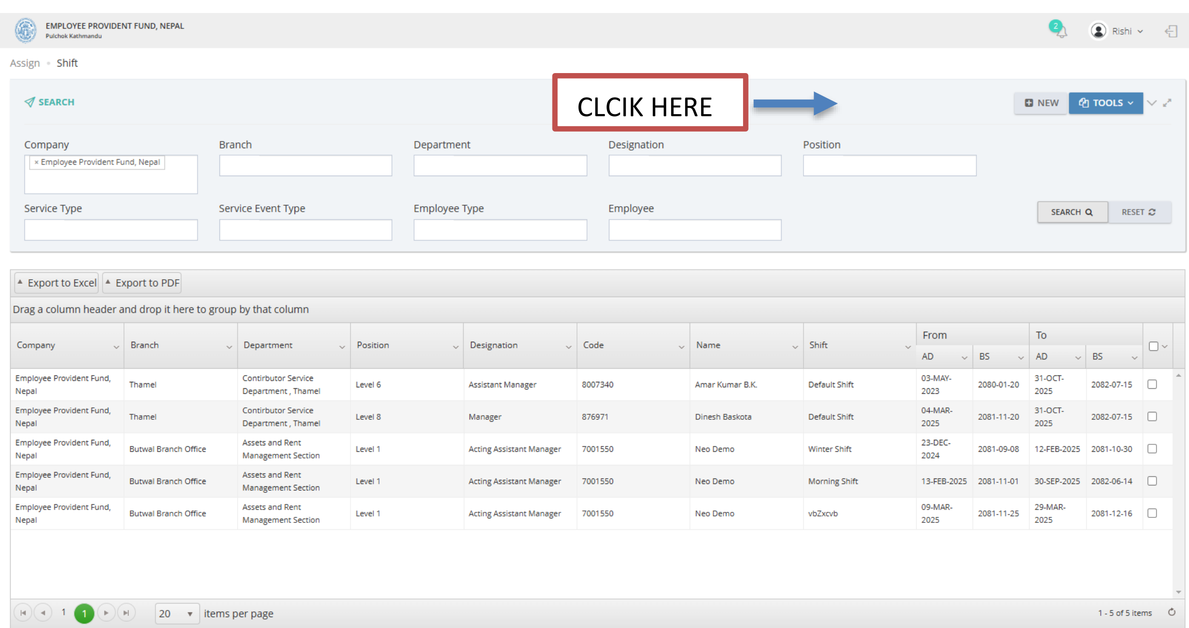




47. Assign Mod

The **Assign Module** enables **administrators and managers** to operate in the HRIS system where they can perform efficient resource assignment and organizational structure configuration. The module enables administrators to connect departments to branches while assigning employees at the designated branches through employment type and service type and service event type criteria. The Assign Module gives administrators capabilities to create and manage employee assignments through branch configurations in ways that conform to establishment policies developed in the Setup Module. This comprehensive functionality ensures streamlined workforce management while maintaining flexibility for organizational needs.

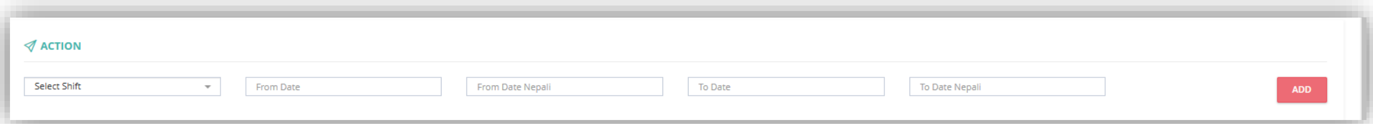
The module also includes several sub-modules, such as **Shift**, **Holiday & Leave**, which enable seamless integration of work schedules and leave policies into the overall assignment process.



Company	Branch	Department	Position	Designation	Code	Name	Shift	From AD	From BS	To AD	To BS
Employee Provident Fund, Nepal	Thamel	Contirbutor Service Department , Thamel	Level 6	Assistant Manager	8007340	Amar Kumar B.K.	Default Shift	03-MAY-2023	2080-01-20	31-OCT-2025	2082-07-15
Employee Provident Fund, Nepal	Thamel	Contirbutor Service Department , Thamel	Level 8	Manager	876971	Dinesh Baskota	Default Shift	04-MAR-2025	2081-11-20	31-OCT-2025	2082-07-15
Employee Provident Fund, Nepal	Butwal Branch Office	Assets and Rent Management Section	Level 1	Acting Assistant Manager	7001550	Neo Demo	Winter Shift	23-DEC-2024	2081-09-08	12-FEB-2025	2081-10-30
Employee Provident Fund, Nepal	Butwal Branch Office	Assets and Rent Management Section	Level 1	Acting Assistant Manager	7001550	Neo Demo	Morning Shift	13-FEB-2025	2081-11-01	30-SEP-2025	2082-06-14
Employee Provident Fund, Nepal	Butwal Branch Office	Assets and Rent Management Section	Level 1	Acting Assistant Manager	7001550	Neo Demo	vbZxcvb	09-MAR-2025	2081-11-25	29-MAR-2025	2081-12-16

In order to assign Branches, departments and set employees under any department or branch, follow the following process;

Step 1: Navigate to Search button and click on it.
(Now the list of all employees will be displayed and all employees are assigned.)
Step 2: Now Select the specific employe and click the check box shown at the extreme left hand of every employe list's row.

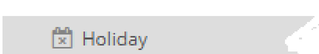


After clicking on check box action interface will now be activated where managers or admin can select specific shift to modify/ edit by providing date ranges from given calendar interface.

Step 3.: Assign/Modify Branch, Department, etc.
Assuming admin access role, he/she can assign an employee to specific branch and departments.

1. **Select Shift:** Select the shift type from provided shift's drop down list.
2. Select On From date & To Date Calendar box to specify date range
3. Click ADD button to submit the changes.
4. Repeat for Other Employees as necessary.

.



Similarly, as assigning Shift to an employee, admin can also assign any kind of holiday to the specific employee. Here's how an admin can assign it.;
Step 1.: Assignment within the Holiday Assigning Screen

- Locate the "Search button" click on it.
  Using Search: Enter an employee's name, ID, or other identifier in the search box.
  OR
- Click on the search button.

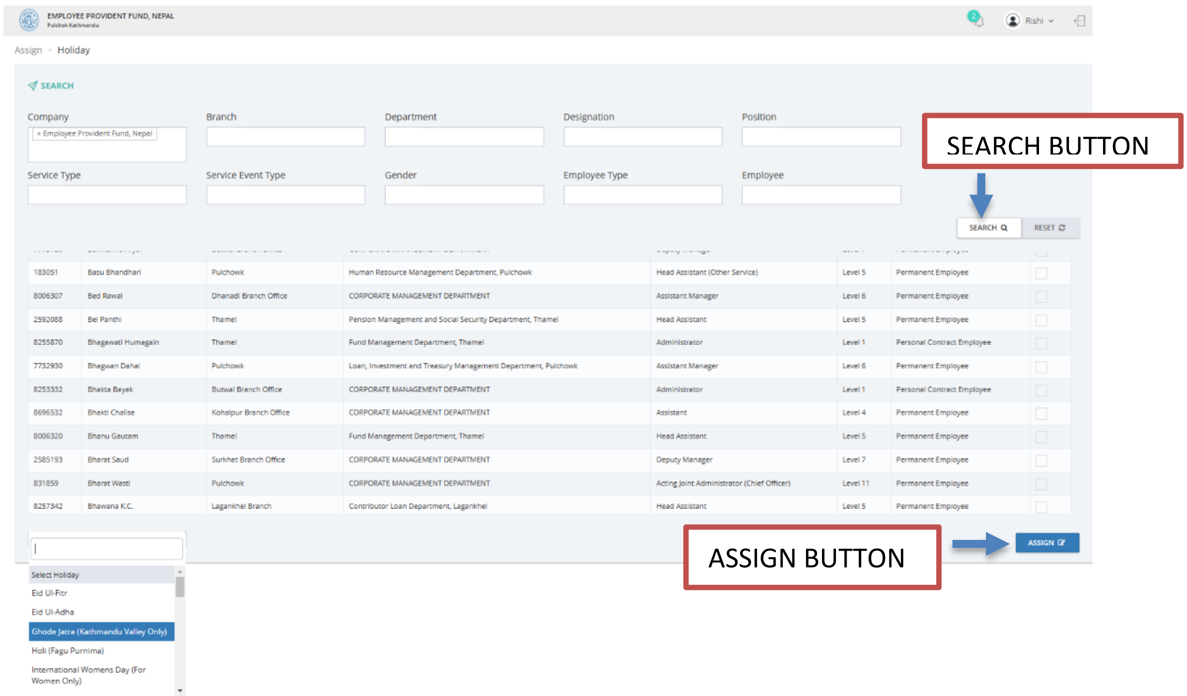
  Now the list of all employees with all details are displayed on the screen if clicked on the search button, otherwise, search employee's details only be shown.

Step 2.: Using Employee List, scroll through it to find the employees to which admin has to assign holiday.

The section likely includes a search box with employee list.

- **Select Employees:** Check the checkbox next to the name of each employee you want to assign the holiday to.
- **Confirm Assignment:** There might be a button like "Assign" for finalizing the assignment.

Repeat: Repeat steps for all those employees for whom admin has to assign.



NOTE: All assigned Parameters (Holidays/Shifts/Leaves) are linked with employees and can be view from employee's module or from self-service.

50. Assign Lea

In order to assign Leaves to specific employees, Follow the steps shown below:

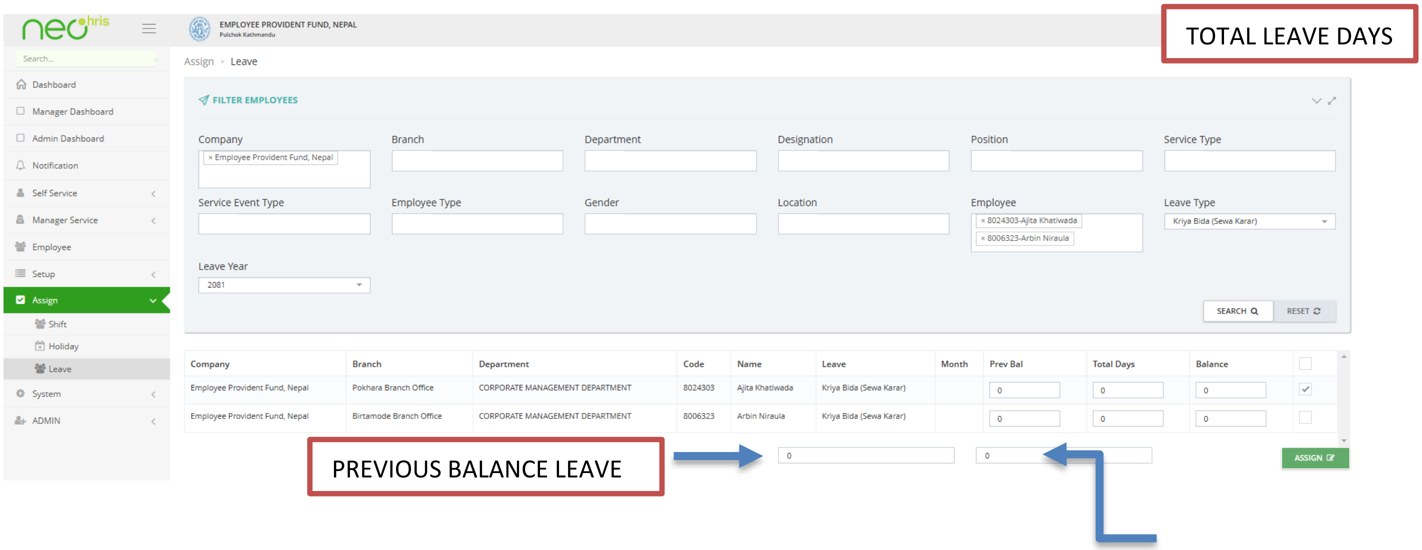
Step 1.: Assignment within the Leave Assigning Screen

- Locate the "Search button" click on it.
  Using Search: Enter an employee's name, ID, or other identifier in the search box.
  OR
  Click on the search button.

  Now the list of all employees with all details are displayed on the screen if clicked on the search button, otherwise, search employee's details only be shown.

Step 2.: Using Employee List, scroll through it to find the employees to which admin has to assign Leave.
The section likely includes a search box with employee list.

- **Select Employees:** Check the checkbox next to the name of each employee you want to assign the Leave.
- Enter Previous balance Leave days on the Left side text box and Total Leave days to right side text box.
- **Confirm Assignment:** There might be a button like "Assign" for finalizing the assignment.

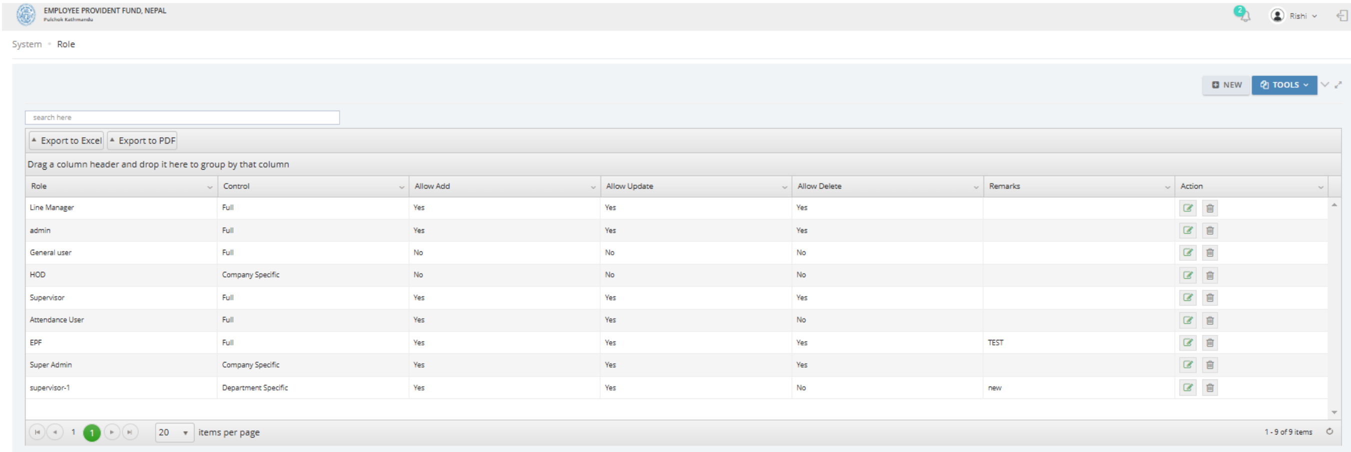


51System Mod

The **Setup Module' SYSTEM sub module** is designed to provide a structured and efficient way to manage user roles and permissions within the system. Its primary objective is to ensure that different users have appropriate access rights based on their roles and responsibilities (can generate user's role like **General, Managerial or Admin)**. By defining **Role Names**, administrators can create role-based access control, enhancing security and operational efficiency. The module includes essential permission settings such as:

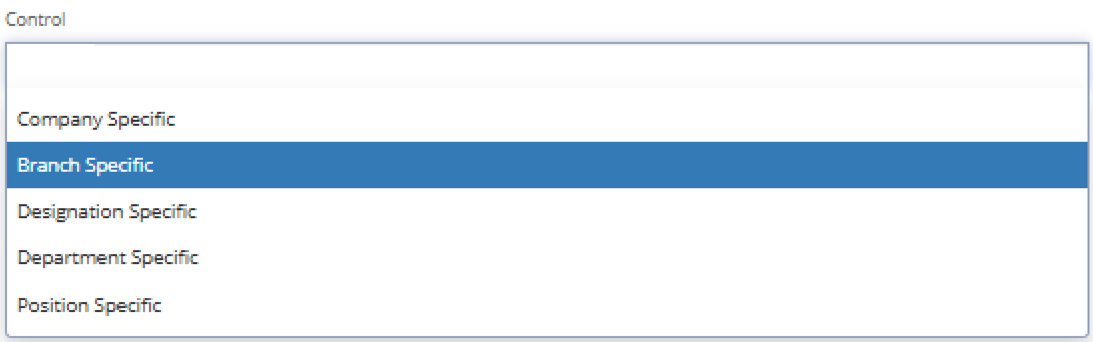
Allow Add
Allow Update and
Allow Delete

which help regulate data modification rights, preventing unauthorized changes. Additionally, specialized HR permissions like **HR Approve** and **HR Cancel** ensure that critical HR functions are controlled by authorized personnel only. The **Control** field allows further categorization or restriction of access based on predefined criteria. A **Remarks** section enables documentation of role-specific notes, ensuring clarity in role assignments. By implementing this module, organizations can streamline access management, maintain data integrity, and enforce role-based security policies across the system. section is available for additional notes. The interface is designed for ease of use, with radio buttons for quick selection and a **Submit** button to save configure.



Role	Control	Allow Add	Allow Update	Allow Delete	Remarks	Action
Line Manager	Full	Yes	Yes	Yes		
admin	Full	Yes	Yes	Yes		
General user	Full	No	No	No		
HOD	Company Specific	No	No	No		
Supervisor	Full	Yes	Yes	Yes		
Attendance User	Full	Yes	Yes	No		
EPF	Full	Yes	Yes	Yes	TEST	
Super Admin	Company Specific	Yes	Yes	Yes		
supervisor-1	Department Specific	Yes	Yes	No	new	

Steps 1: Navigate over Role sub menu placed under System module and click on it.
Now a page will be opened where all configured role is listed. As shown in above figure.
Step 2: Click o the NEW button placed on the upper right-hand side of the screen.
Step 3: Enter Role name (e.g.: admin, manager, general user).
Step 4: Select the control type from drop down box like shown below. Here control should e selected on the nature of the responsibilities like whether the specified role is company specific, Department specific, Designation specific or branch specific.



Here, if we select a control as company specific then it will be applied not only to branch or department but to whole company whereas if we select as branch specific then it will enable for branch specific only.

Step 5.: Select the option provided according to the selected control specific. (e.g: company name or branch name)."
Step 6: Configure the functions like

- Enabling or disabling "Allowing Update" function by choosing YES or NO button.
- Enabling or disabling "Allow Delete" function by choosing YES or NO button.
- Enabling or disabling "Allow Add" function by choosing YES or NO button.
- Enabling or disabling "HR Approve" function by choosing YES or NO button.

Step 6: Click SUBMIT button to save the newly specified role functions.

Note: Here, all above mentioned functions effects all user who are assigned specified role to allow or deny Update/Add delete or approve function.

In this sub module, an admin can choose specific created users and assign earlier created role to it.

Step 1: Navigate over User sub menu placed under System Module and click on it.

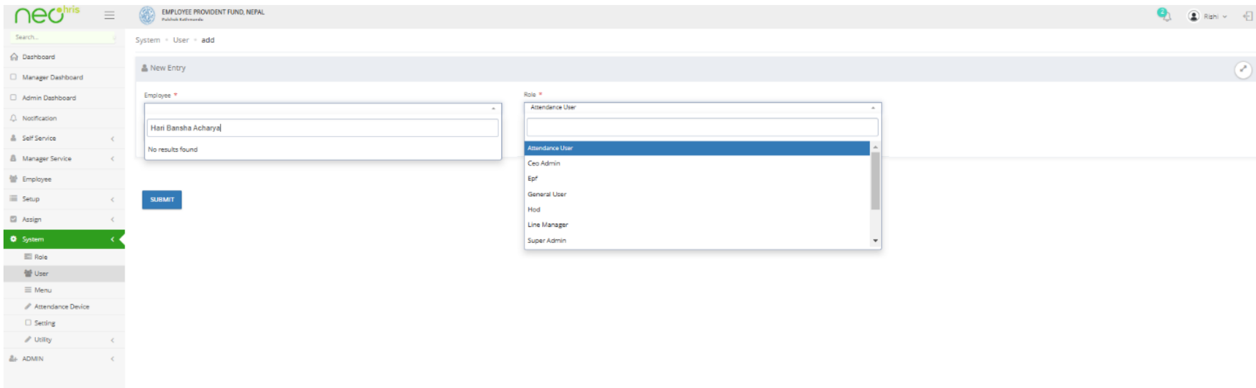
After clicking, a page will be displayed where all the users with assigned role will be displayed. And from the same page we can add new user and assign a role to it.

Step 2: Click NEW button placed on the upper hand side of the page.

Step 3: Select the user listed under drop down list of Employee drop down box and

Step 4: Select a Role according to the nature of responsibilities of selected USER.

Step 5.: Click Sumit button.



Menu

The **Menu Structure Setup Module** in an **HRIS (Human Resource Information System)** allows administrators to define, organize, and manage the system's navigation menu. This module ensures that menu items are structured logically, providing users with a streamlined experience while accessing different HR functions based on their roles and permissions.

Key Features of the Menu Structure Setup Module:

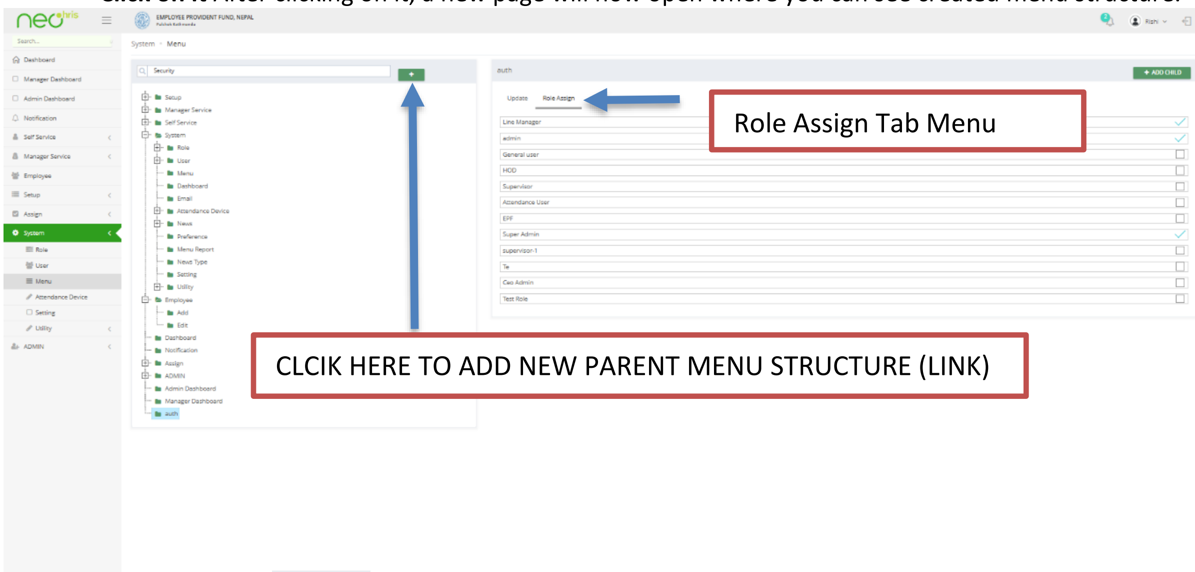
1. **Menu Item Management:**
   - Allows administrators to create, edit, and delete menu items.
   - Supports hierarchical structuring (main menu and sub-menus).
2. **Role-Based Menu Customization:**
   - Administrators can assign specific menu items to different user roles.
   - Ensures that employees, HR personnel, and managers only see relevant sections.
3. **Dynamic Visibility Control:**
   - Option to enable or disable menu items based on business requirements.
   - Can restrict access to certain modules for specific departments or user levels.
4. **Parent-Child Menu Relationship:**
   - Supports a **nested menu structure**, where sub-menus fall under parent categories.
   - Example:
     - **Employee Management**
       - → Employee List
       - → Add New Employee
       - → Employee Documents
5. **Menu Sorting and Ordering:**
   - Provides drag-and-drop or numeric input to rearrange menu items.
   - Helps maintain an intuitive and logical menu flow.
6. **Icon and Label Customization:**
   - Allows adding icons and custom labels for better UI/UX.
   - Helps in quickly identifying different sections.
7. **Integration with Permissions Module:**
   - Works in sync with the **Role Management Module**, ensuring users can only access authorized features.
   - Auto-updates menu visibility when permissions are changed.
8. **Multi-Level Menu Support:**
   - Enables complex HR workflows by allowing multiple layers of sub-menus.

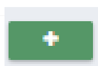
- Useful for organizing HRIS functionalities efficiently.

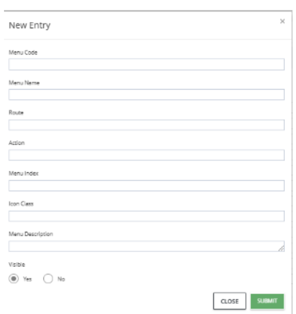
The **Menu Structure Setup Module** is essential for creating a well-organized and role-specific navigation experience in the HRIS. It ensures that employees and HR staff can efficiently access relevant features while maintaining security and operational control.

Follow the following steps to access menu:

Step 1.: Navigate over System Module and under system module you can find the sub menu called MENU **Click on it** After clicking on it, a new page will now open where you can see created menu structure.



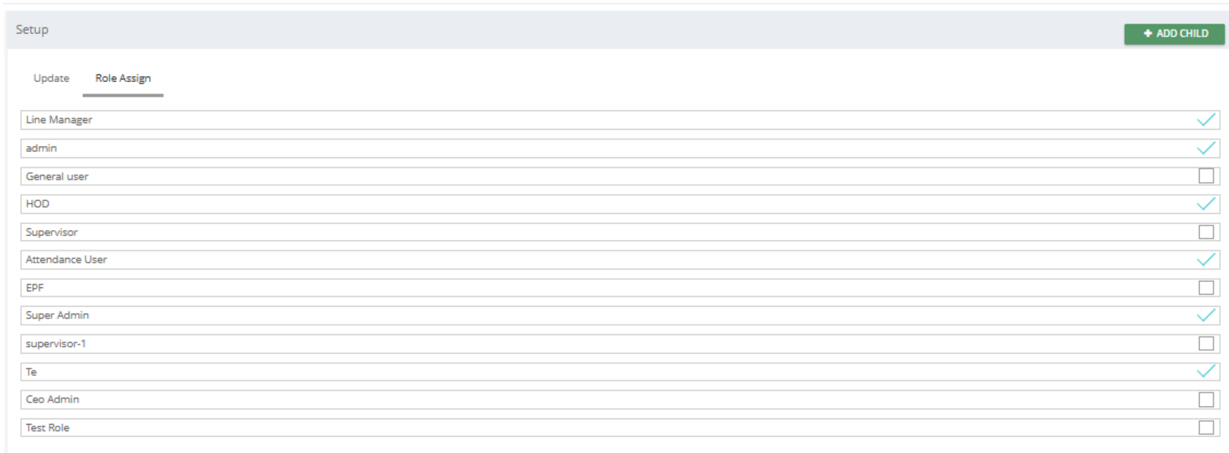
Step 2.: Click on green  + button in order to add new Parent menu structure so that the added menu can be viewed by menu assigned users.



- Enter Menu code
- Enter Menu Name
- Enter Route information (necessary for backend system routing-Pages)
- Enter Action and Menu Index.
- Enter Icon Class detail
- Menu description
- Choose Menu Visible option YES or NO.

Step 3.: After adding new menu structure, admin has to assign role to added menu structure. So, Click on the “Role Assign” Tab menu available in the middle of the page.

Now



Here, Admin can select user in order to display added Menu structure inside selected users type from Role Assign screen.

For Adding CHILD MENU:

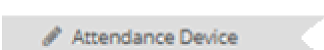
Step 1.: Click on “ADD CHILD” button if admin needs to add further sub menu under newly added menu structure. (Repeat same steps as in parent menu structure.)

Step 2: Similarly, as in Parent, admin has to assign role to added menu structure. So, Click on the “Role Assign” Tab menu available in the middle of the page.

This will link all the added sub menu to the assigned role users.

UPDATE TAB:

This tab is used to update t or change the information of the added menu by admin.



This Sub module is a web-based interface specifically for managing biometric attendance devices. Following are the main controls explained;

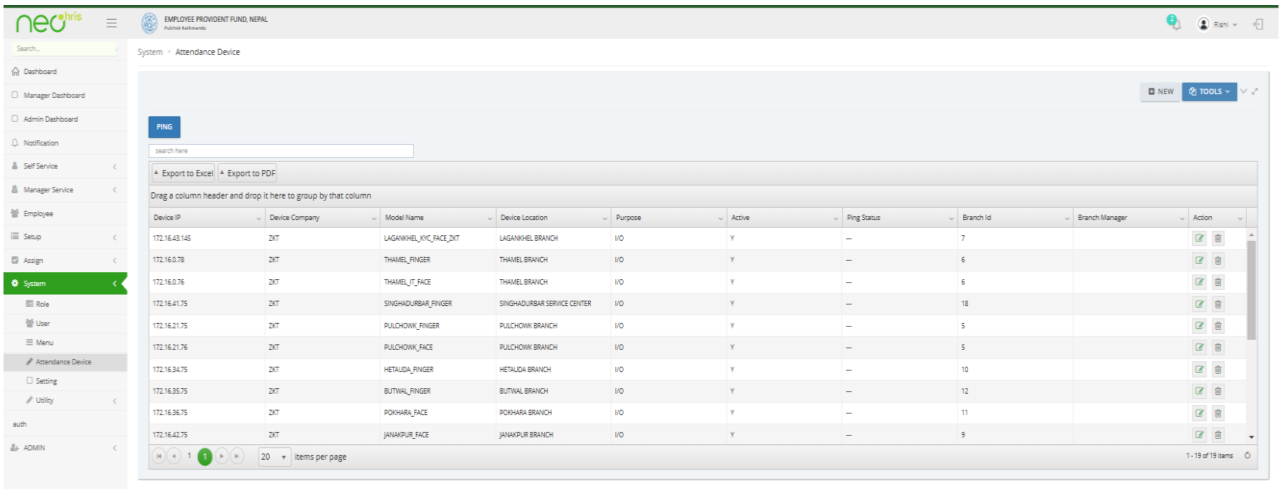
Key Features:

1. **Main Controls:**
   - **PING Button:** It is used to check the connectivity status of biometric devices. Admin has to
   - **Search Box:** It allows users to filter devices based on search queries.

- **Export Buttons:** Options to export data to **Excel** and **PDF**.
- **New Button:** It is for adding new biometric device with the system.
- **Tools Dropdown:** For exporting the device information as PDF or excel format.

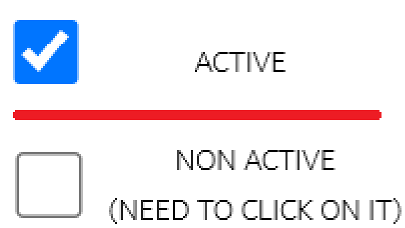
2. **Data Table:**
   - In this section, Device IP, Device Company, Model Name, Device Location, Purpose, Active Status, Ping Status, Branch ID, Branch Manager, and Actions are provided.

Therefore, this page as like a dashboard where admins can **manage biometric devices**, monitor their status, and export data.

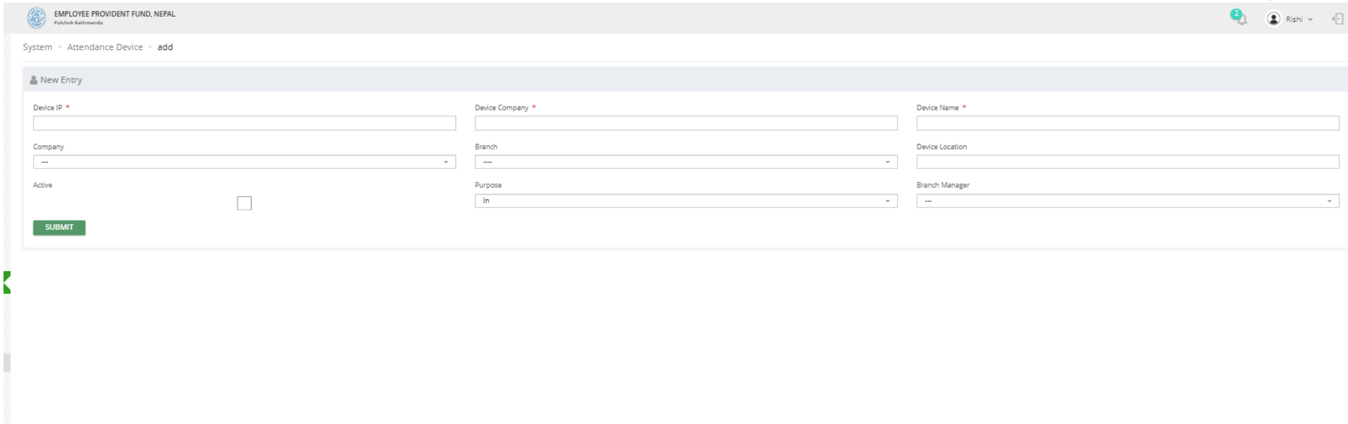


BUTTON TO ADD NEW ATTENDANCE DEVICE

For Adding new Device:
Step 1: Navigate over system menu and under it, click on the Attendance Device sub menu.
Step 2.: Click on the NEW button available on the upper right and side of the page.



CLICK THIS BOX TO MAKE DEVICE ACTIVE



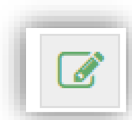
Here,
Step3.: now Enter IP address of the device (attendance device) in the Device IP box.

Step 4.: Enter the device's brand(company) name e.g. ZKT, HIKVISION or any other brand name.
[In order to check the name of the company, please refer the box pack or find the name printed on the device.]

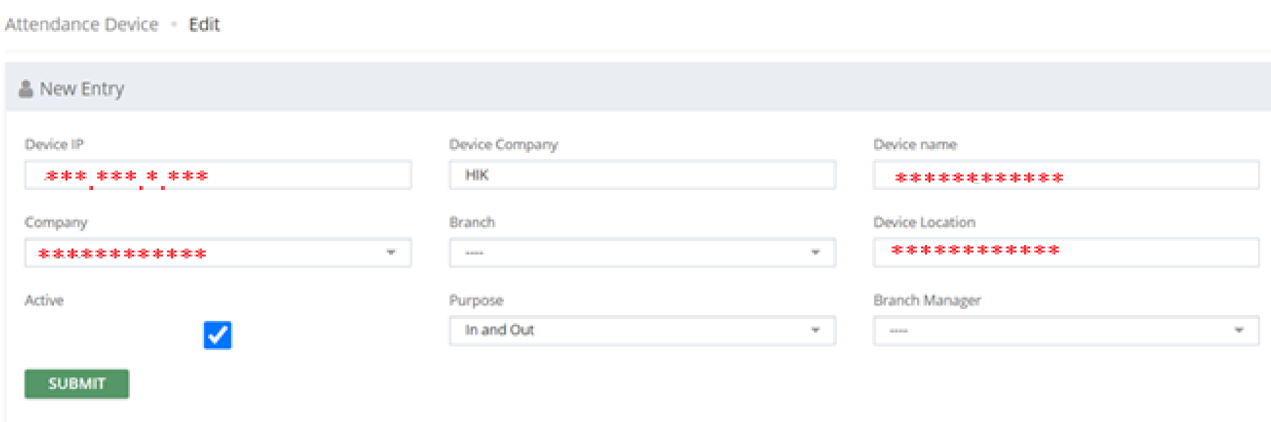
Step5.: Click on the **Company** drop down box in order to select the name of the company for which we need to assign the new device.
Step 6.: Click on the **Branch** drop down box in order to select the branch name from which we need to assign the new device.
Step 7.: Enter the name of Location for the new device, where we need to place it.
Step 8.: Click on the check box in order to make the new device active.
Step 9.: Select the purpose the device provided from the drop-down list.
[Here this **Purpose,** it is to use a device for both check In and Check Out, just for Check In, or just for check out attendance only.]
Step 10.: Select the name of the Branch Manager.
Step 11.: Click SUBMIT button to save the information.

For Editing the Device information:

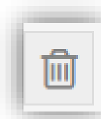
Step 1: Click on the green edit button shown under the Action column.



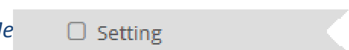
Now a page will open where we canedit the information added earlier like shown below:



For Deleting the Attendance Device list;

- Click on the TRASH icon from the Action column . 

55. Setting Me



This settings page allows you to configure various parameters for the HRIS system. Below are the step-by-step instructions for updating the settings:

Step 1: Accessing the Settings Menu

1. Log in to your HRIS system using your credentials.
2. Navigate to the **System** and then to **Settings** menu

Step 2: Updating Company Information

1. **Company Name**: Enter the organization's name in the text field (e.g., "EMPLOYEE PROVIDENT FUND, NEPAL").
2. **Company Address**: Provide the official address (e.g., "Pulchok, Kathmandu").
3. **Company Account No**: Enter the unique account number for the company.

Step 3: Configuring Account Security

1. **Account Lock Try Chance**: Define the number of incorrect logins attempts before an account gets locked (e.g., "5").
2. **Account Lock Try Second**: Set the lock duration in seconds (e.g., "300" seconds or 5 minutes).
3. **Force Password Renew Day**: Set the number of days after which users must update their passwords (e.g., "45").
4. **Allow Account Lock**: Choose **Yes** or **No** to enable or disable account lock after multiple failed attempts.

Step 4: Leave and Attendance Settings

1. **Sub Leave Max Days**: Specify the maximum number of leave days a user can take (e.g., "500").
2. **Leave Encash Max Days**: Set the maximum number of leave days that can be encashed (e.g., "9").
3. **Late Penalty Leave Deduction**: Enter the penalty for late check-ins in terms of leave deduction (e.g., "0.5").
4. **Allow System Attendance**: Choose **Yes** to allow attendance tracking through the system.
5. **Late Check-in Approval**: Select **Yes** if late arrivals require approval.

Step 5: Payroll Settings

1. **Old Pay slip Type**: Choose between **Oracle, MySQL, or None** for the pay slip database.
2. **Include Holiday As Leave**: Select **Yes** to count public holidays as leave.
3. **Include Day off As Leave**: Choose **Yes** to consider day-offs as leave.

Step 6: Miscellaneous Settings

1. **Show Address Book**: Choose **Yes** to enable the address book feature.
2. **Enable Previous Month Leave Request**: Select **Yes** to allow leave requests for the previous month.
3. **First Time Password Renew**: Enable password reset on the first login.
4. **Province-wise Branch Filter**: Enable filtering employees by province.
5. **Notice Type**: Choose **Single** or **Multiple** to define notification types.
6. **Travel Substitute Cycle**: Allow travel leaves to be substituted if needed.
7. **Send Pay slip in Email**: Select **Yes** to enable pay slip distribution via email.

Step 7: Report and Ordering Settings

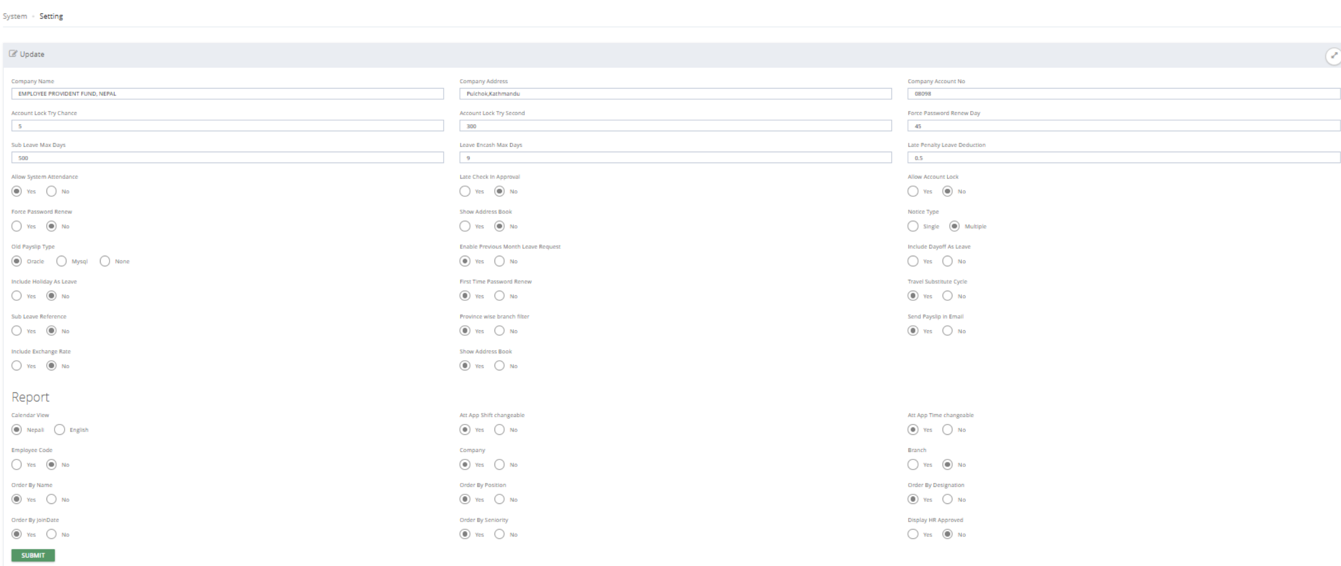
1. **Calendar View**: Choose **Nepali** or **English** format for attendance reports.
2. **Order By Name/Join Date/Position/Designation/Seniority**: Set the preferred order for displaying employee data.
3. **Display HR Approved**: Enable if HR approval is required for certain actions.

Step 8: Shift & Time Configuration

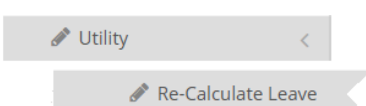
1. **Attendance App Shift Changeable**: Allow employees to change their shift in the attendance application.
2. **Attendance App Time Changeable**: Permit changes to recorded attendance times.
3. **Branch & Company Filters**: Enable filtering employees by branch or company.

Step 9: Saving Changes

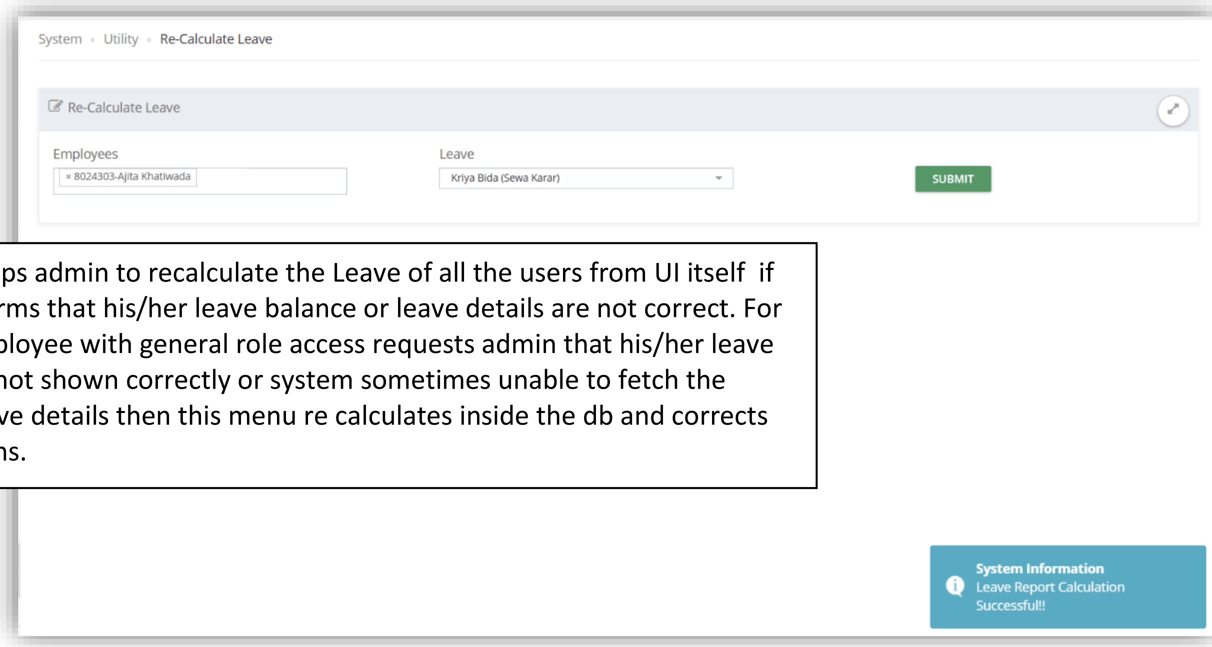
1. After configuring all the settings, click the **"Submit"** button at the bottom.
2. The system will save the changes and apply them accordingly.



56. Utility

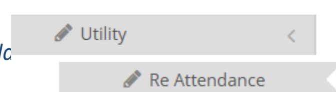


Step 1.: Navigate over System menu and under it, click on the utility sub menu.
Step 2.: Now after utility page opens, select Employee name from the drop-down list and select the type of leave for which we need to recalculate.
Step3.: Click the SUBMIT button and message will pop up at the bottom right-hand screen as shown in the image below.

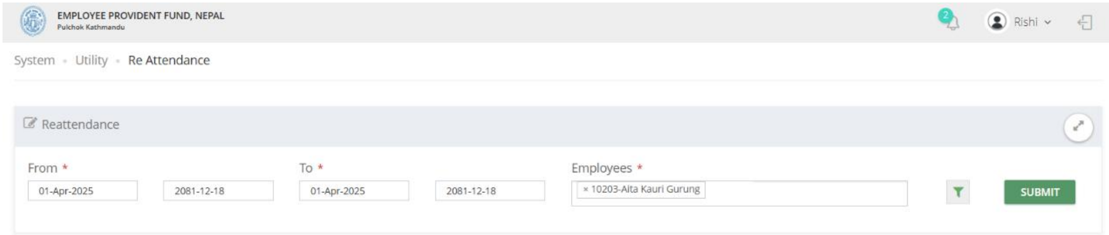


This Menu helps admin to recalculate the Leave of all the users from UI itself if the users informs that his/her leave balance or leave details are not correct. For e.g. : if an employee with general role access requests admin that his/her leave calculation is not shown correctly or system sometimes unable to fetch the calculated leave details then this menu re calculates inside the db and corrects the calculations.

57. Re Attendc

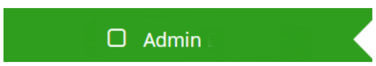


This sub menu is used to show the attendance data if by any chance the user is unable to view his/her attendance data on the UI. This tool is useful to fetch the attendance data from the db and redisplays the details on the UI.



Steps:

- *Select the date range from given date selection calendar*
- *Select the name of Employee*
- *Click the SUBMITT button for re attendance.*



The admin module in the HR management system allows administrators to efficiently manage employee leaves, attendance, and service status. It includes features such as Leave Status, where admins can track employee leave records; Leave Balance, which provides an overview of remaining leaves; and Leave Apply, allowing admins to apply leave on behalf of employees. Additionally, it supports Leave Deduction, attendance tracking, and reporting functionalities such as Attendance Status Reports and Penalty Reports. Admins can also control attendance settings, update an employee's service status, and establish employee reporting hierarchies.

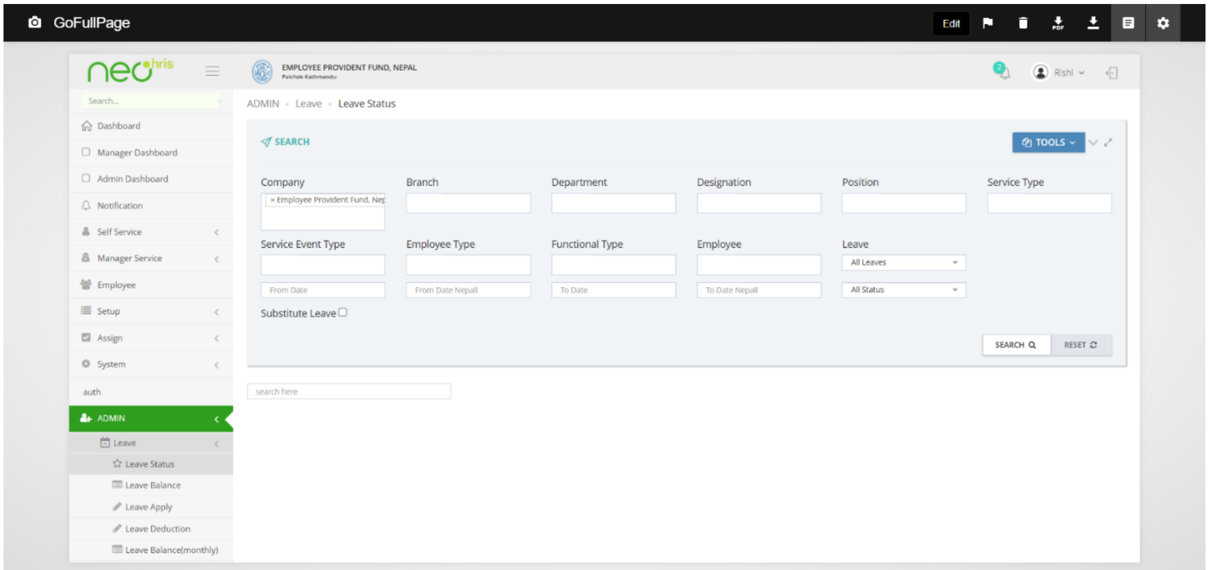
In addition to managing leave, attendance, and employee service status, the Admin also plays a crucial role in **policy enforcement** and **system configuration**:

1. **Policy Enforcement & Compliance**: The Admin ensures that all leave and attendance policies align with company regulations. They can configure leave policies, track system operations, and take necessary actions as per the requirements.
2. **System Configuration & User Management**: The Admin is responsible for configuring system settings, such as defining leave categories, setting attendance rules, and managing user roles and permissions. They can add or remove employees, reset passwords, and control access to different modules to maintain data security and integrity.

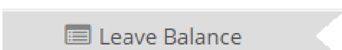
Step-by-Step Process:

1. **Accessing the Admin Module**:
   - Log in to the system as an admin.
   - Navigate to the **ADMIN** section from the left panel.
2. 

Click on **Leave > Leave Status**.
   - Use the search filters to find specific employees or leave types.
   - Click **Search** to view leave records.

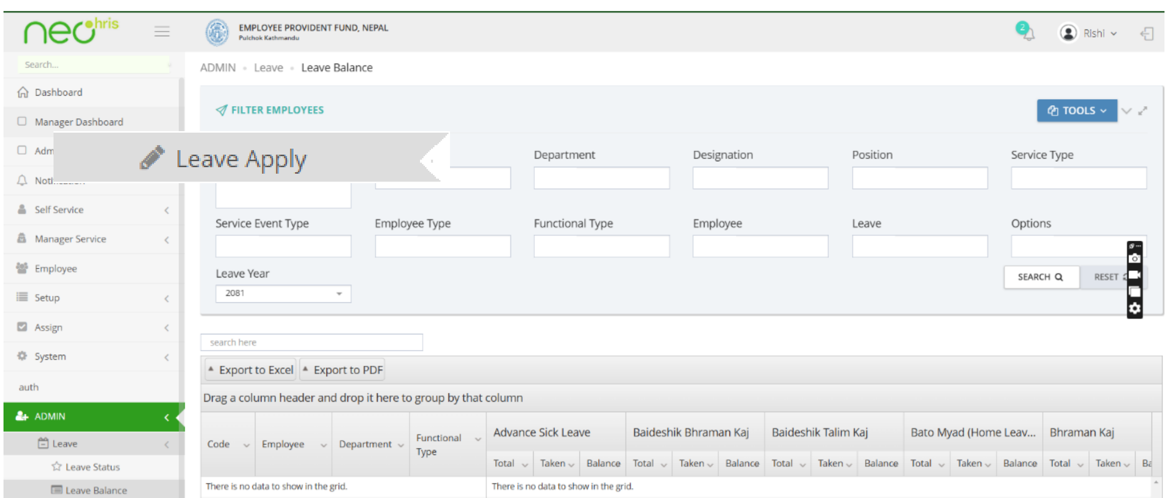


3.



Go to **Leave > Leave Balance**.

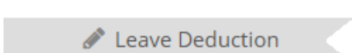
- Select an employee to see their leave balance details.



4.

- Click **Leave > Leave Apply**.
- Choose the employee and enter leave details.
- Submit the leave application.

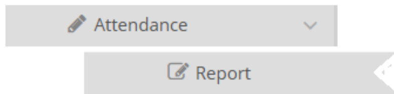
5.



- Navigate to **Leave > Leave Deduction**.

- Select the employee and update the deduction details.
- Save the changes.

6.



- Go to **System > Attendance** to control attendance policies. Here admin can manually mark attendance if required.

Generating Reports:
- Navigate to **Reports** for Attendance Status and Penalty Reports.
- User various Filters like Date range, Employee Name, Departments, etc. & select the required filters and generate reports.

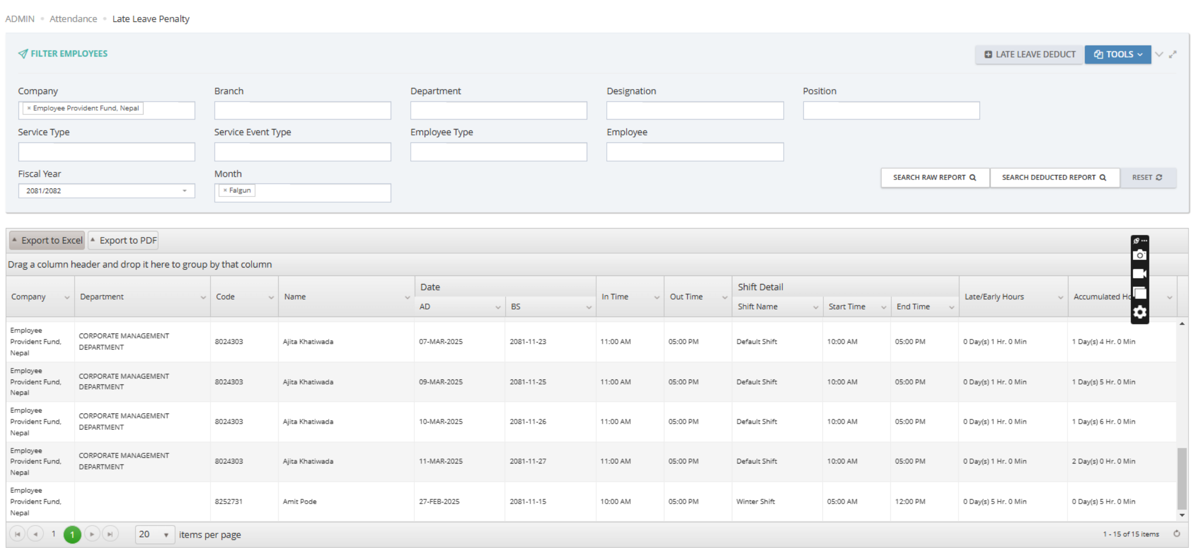
Calendar Reports :

Admin can view specific employee's whole month attendance through calendar by clicking on the Calendar report menu under Admin Module' menu.

Late Penalty Report:

Admin can search or view the list of employees who are marked as penalty. Selecting the Fiscal Year and Month

Here admin can view penalty deducted rereport as well as accumulated reports by clicking respective button shown I the following image.



LATE LEAVE DEDUCT BUTTON:

By clicking this button admin can set the penalty value for whole month and to do so, admin has to click "Late Leave Deduct button and typing the necessary value for deduction as penalty**.**

Example:

0.5 means Half Day - Applies to whole full Month
1 means One Full Day - Applies to whole full Month

Auto Leave Penalty: This Features are used by admin when he/she has to deduct the leave from any employees, when absent days are to be marked as Leave.

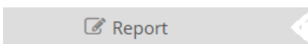
Use **ABSENT AUTO LEAVE** button for informing all employees whose absent day has been marked as leave via SMS.

Penalty Report: Admin can use this function when he/sha has to generate Penalty report on monthly basis

- Click on the Penalty Report Menu.
- Select Fiscal Year and Month
- Click Search button.

7. **Updating Employee Service Status**:
   - Access **Employee > Service Status**.
   - Modify employment details such as promotions or department changes.
8. **Setting Employee Reporting Hierarchy**:
   - Go to **Setup > Reporting Hierarchy**.
   - Define managers and reporting structures for employees.

By following these steps, admins can effectively manage employee records, leaves, and attendance while ensuring smooth HR operations.



This section of HR system, which includes various reporting options such as Leave Summary (Individual), Department All, Leave Report, and New Department Wise Daily. Below are the step-by-step instructions to access and generate reports using these options:

Steps to Access and Generate Reports:

1. Accessing the Reports Module

- Log in to the system as an Admin or authorized user.
- Navigate to the **Report** section in the left sidebar.

2. Generating Leave Summary (Individual)

- Click on **Leave Summary (Individual)**.
- Select the specific employee whose leave summary you want to view.
- Choose the date range for the report.
- Click **Generate Report** to view or download the leave summary.

3. Viewing Department-Wide Reports

- Click on **Department All**.
- Select the department from the dropdown menu.
- Choose the date range to filter leave records.
- Click **Generate Report** to see leave data for all employees in the selected department.

4. Generating a General Leave Report

- Click on **Leave Report**.
- Select filters such as department, date range, or employee type.
- Click **Generate Report** to obtain a comprehensive leave report.
- The report can be exported if required.

5. Checking Daily Department-Wise Reports

- Click on **New Department Wise Daily**.
- Select the department.
- Choose the date for which you need the report.
  - Click **Generate Report** to view the daily leave and attendance summary for that department.

These reports help administrators track employee leaves efficiently and ensure smooth HR operations.

Thank You.
Assistance : 9802323343 / 9851225672