HCM Portal User Guide

# 1. Introduction

This document serves as a user guide for the HCM Portal. It is intended to help users understand the application, navigate through different screens, and perform various tasks efficiently.

# 2. Purpose

Purpose of this document is to identify relevant information based on the user question and help user. And the role based details should be strictly restricted to the role of the current user who logged into the system. That means, if an Admin is asking the question, he should get details related only to Admin screens, functionalities and capabilities, and similarly when a manager is asking questions, he should get information about the screens specific to manager role.

# 2. Getting Started

To begin using the HCM Portal, users must log in with their credentials. The portal is divided into different sections based on user roles such as Manager and Admin. Each screen is equipped with an AI Web Assistant to provide contextual help.

# 3. Manager Screens

## 3.1 Dashboard

The Dashboard provides an overview of

1. Number of employees under current manager.
2. Pending number of leave requests to be approved.
3. Quick Action section with below options
   1. Add New Employee
   2. Review Leave Requests

Navigation Paths:

* Accessible directly after login.
* 'Add New Employee' can also be accessed from the left navigation or Employee Management screen.

## 3.2 Employee Management

To go to employee management page use **URL Path**: /employees

This screen allows managers to view and manage employee records.

Using Add Employee on the top right, user can go to add employee screen and add new employee record.

Then, there is a row of filters to filter the employees on different filters like,

* Employee name
* Department
  + Engineering
  + Marketing
  + Sales
  + HR
  + Finance
  + Operations
* Employee Status
  + Active
  + Inactive
  + On Leave
  + Terminated
* Date filter to filter by From and To of joining date.

Then the grid follows with below list of details shown for every employee,

* Employee ID
* Full Name
* Department
* Designation
* Employment Type
* Status
* Date of Joining

Then there are action buttons against each employee record to view employee information and edit employee information

View Employee show all below data about employee on the popup:

Basic Information

* Employee ID
* Full Name
* Department
* Designation
* Employment Type
* Status
* Role
* Date of Joining
* Manager

Contact Information

* Email
* Phone
* Address

## 3.3 Add New Employee

To go to add employee page use **URL Path**: /employees/add

On this screen, manager can onboard/add new employee to the system/company.

Below list of details can be captured on this screen.

Basic Information

* Employee ID (Required field)
* Full Name (Required field)
* Date of Joining (Required field)
* Department (Required field)
* Designation (Required field)
* Employment Type (Required field)
* Manager Name (Required field)

Contact Information

* Email
* Phone
* Role
* Address

Once the data is entered, user can click on Save Employee to save the details.

Navigation Paths:

* Via Dashboard Quick Actions
* From left navigation menu item “Manage Employees”

## 3.4 Leave Request Management

To go to leave request management page use **URL Path**: /employees/leave-requests

Manager can view and manage leave requests submitted by his reporting employees.

On the top right, list of filters to filter leave requests by different statuses All, Pending, Approved and Rejected are available, user can also see the number of requests in that status next to each filter name.

Then a full-fledged row of filters are there to filter/search leave requests by

* Employee name
* Department
  + Engineering
  + Marketing
  + Sales
  + HR
  + Finance
  + Operations
* Leave Type
  + Annual
  + Sick
  + Personal
  + Maternity
  + Paternity
* Date range filter with From and TO dates to filter by leave requested date

Then there is an option to Clear Filter, if the expected leave requests are not shown in the grid, user can try to clear filters to see all requests.

Then the grid with leave requests is available with below data being shown for each leave request

* Employee Name
* Department
* Leave Type
* Duration Reason
* Request Date
* Status

And the last column in the grid has three actions

1. Approve, if manger is good with schedule and dependency and with the leave reason, he can approve it using this option.
2. Reject, if there is any specific dependency with employee or for other reasons, manager can use this option to reject leave request.
3. Request Change, this allows manager to request employee for changing the leave plan. When this button is clicked, a popup asking for Change Request Comment is shown where manager can add details and request changes.

Navigation Paths:

* From Manager Dashboard
* Via left navigation menu

# 4. Admin Screens

Admins can initiate and manage exit processes.

Admin’s left navigation has Admin Functions section where he can navigate to Employee Exit and Dashboard screens.

## 4.1 Dashboard

On Admin dashboard, user can see two different sections,

1. Exit Processes 🡪 the number here shows the number in progress exit requests.
2. Total Employees 🡪 this number shown the companywide number of employees.

Then, there is Quick Actions section where “Initiate Exit Process” button is available, by clicking it, admin can land on employee exit management screen.

## 4.2 Employee Exit Management

This screen is used to manage employee exit processes. As an Admin, he can initiate exit process for an employee and he can mark them as done once the process is complete.

While initiating exit process, once employee is selected, Exit Type can be selected from the list “Resignation”, “Termination” or “Retirement”, then select last working day, add offboarding notes to future reference, then mark all applicable offloading tasks as done by checking checkbox, below are list of tasks

* Collect company laptop and equipment
* Deactivate system access and accounts
* Collect ID badge and access cards
* Conduct exit interview
* Process final payroll and benefits
* Return company documents and files
* Complete knowledge transfer
* Update organizational chart
* Notify clients and stakeholders

Fields and Elements:

* Employee ID (Required)
* Exit Date (Required)
* Reason for Exit (Optional)

Navigation Paths:

* From Admin Dashboard, user can use Initiate Exit Process and land on Employee Exit Management screen, then click on Initiate Exit Process
* Via Employee Management screen, user can directly click on Initiate Exit Process to launch entry form as popup, submit data and click Initiate Exit Process.

Once the exit process is initiated, Admin can see list of exit requests in the grid and on the grid, for each request, information like employee name, exit type, last working date, initiated date, status, etc., can be seen.

Then the overall status is also shown on the top of the screen in three different sections where each will show the number of requests in that section.

* In Progress
* Completed
* This Month

Then there is a row of filters where admin can filter requests by employee name, exit type or status.

# 5. AI Web Assistant

The AI Web Assistant is available on every screen to provide contextual help.

Users can interact with the assistant to:

* Get help on how to use the current screen
* Understand field requirements
* To achieve specific functional flow.
* Navigate to other screens