SUSTAINABLE OUTREACH AND UNIVERSAL LEADERSHIP LIMITED
(SOUL)

PROJECT EDULEAD

HR MODULE USER MANUAL

VERSION HISTORY

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Introduction

The user manual is designed to provide relevant, and content specific information for the user to use the Leave Application and, Project and Tasks Report functionality of the HR Module in the Edulead product.

Purpose and Scope

The purpose of the document is to provide user a step-by-step guidance to apply for leaves and submit Project and Task Report on a weekly basis.

Edulead Users

The system shall be available to and accessible by Super Administrator (HR), Reporting Manager (Approver) and Employee of the organization

User Access and Privileges

Super admin will be able to access all the functionality mentioned in ***Section 1 – Section 10***. The Reporting Manager and Employee will have access to as detailed in ***Section 8 and 9***

1. Login

Edulead Users will navigate to the URL and enter their credential in the screen as shown below

URL - https://soul.eduleadonline.com

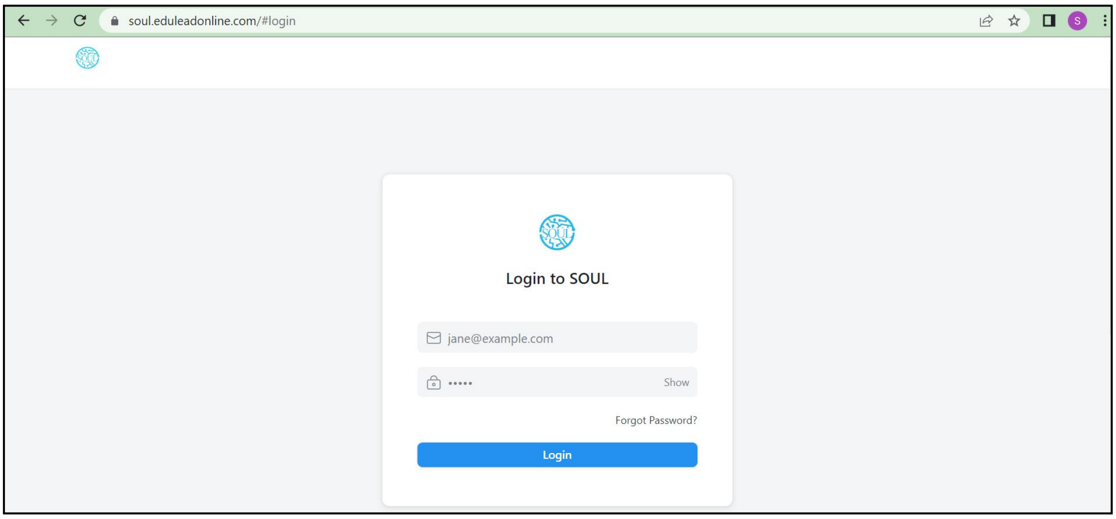

Figure 1: Login Screen

1.1. Login with Email-ID or Employee ID

Edulead Users can login to the screen with their Email-ID or Employee ID

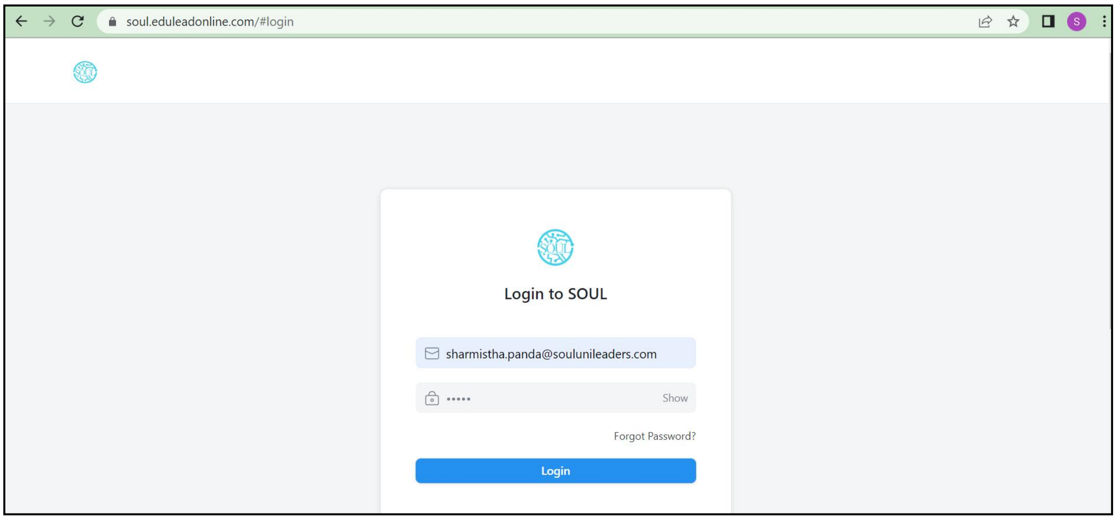

Figure 2: Login with Email-ID

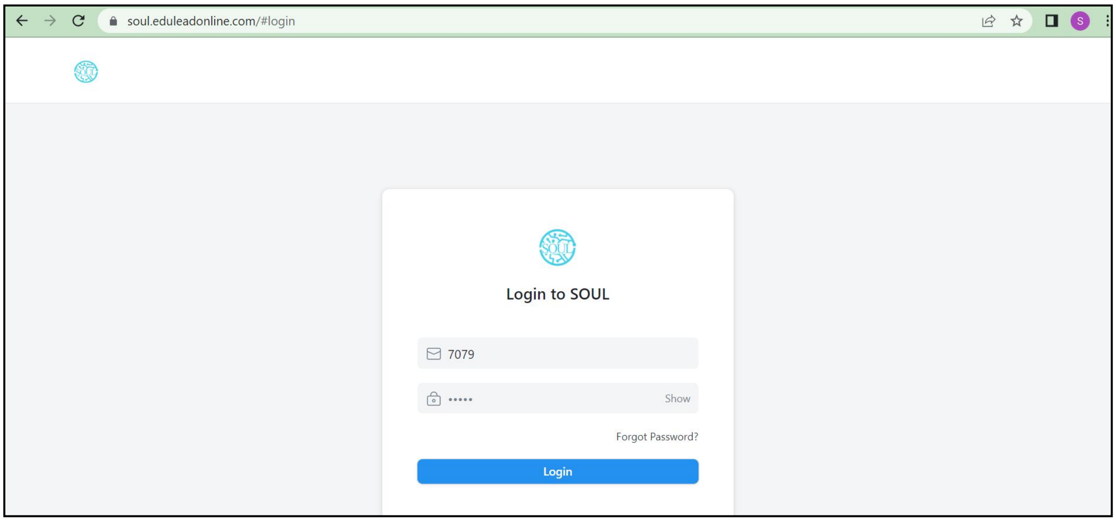

Figure 3: Login with Employee ID

1.2. How to Change Password

a. Log in to Application
b. Click on Profile initials (as shown below)

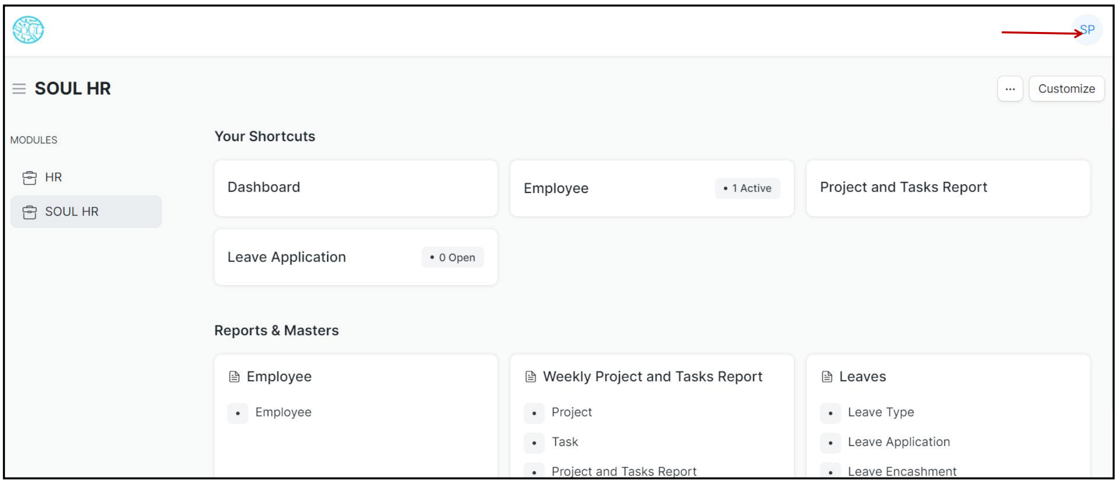

Figure 4: Click on Profile

c. Go to My Settings
d. Scroll to Change Password field

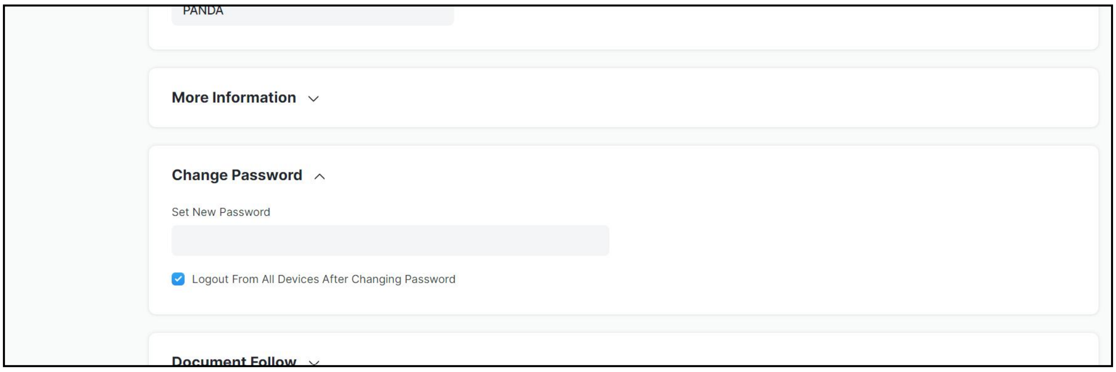

Figure 5: Enter Password

e. Enter the password
f. Click Save

2. Holiday List

Home > SOUL HR > Leaves > Holiday List

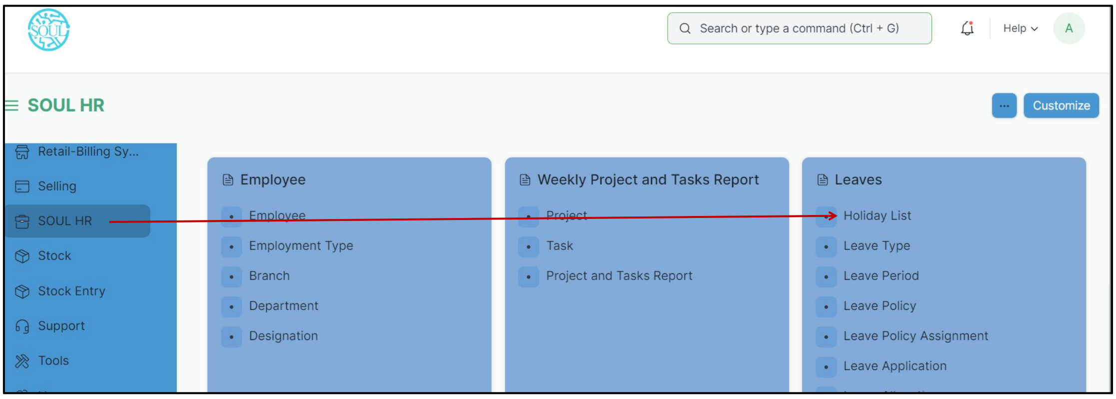

Figure 6: Holiday List

2.1. How to Create Holiday List

g. Go to Holiday List
h. Click on the + Add Holiday List
i. Enter Holiday List Name
j. Select From Date and To Dates
k. Click on the Save button

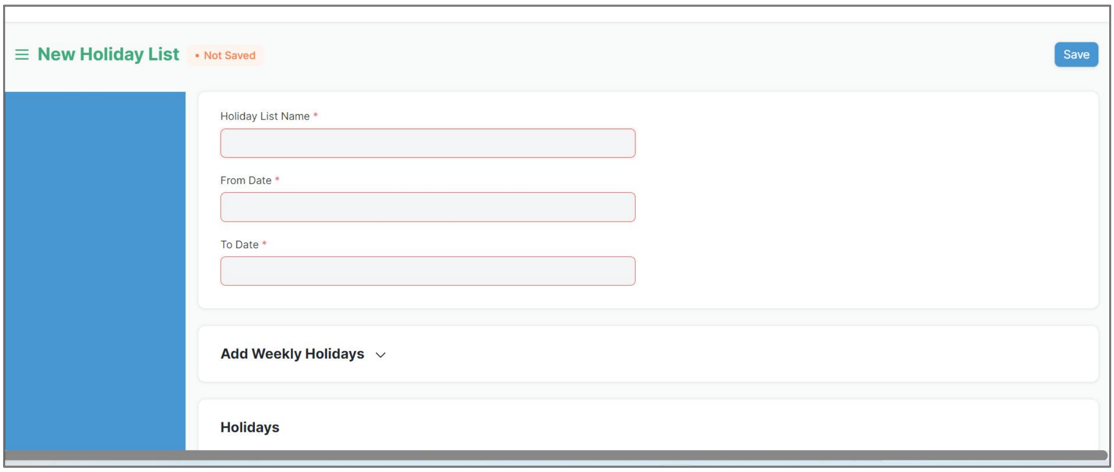

Figure 7: New Holiday List

2.2. Adding Holidays Table

a. Click on the Add Row
b. Select the Date
c. Enter Holiday Description
d. Click on the Save button

Multiple rows can be added based on the no. of holidays the organization has established.

Note: Each time a new holiday is updated in the Holidays table, the Total Holidays field gets updated

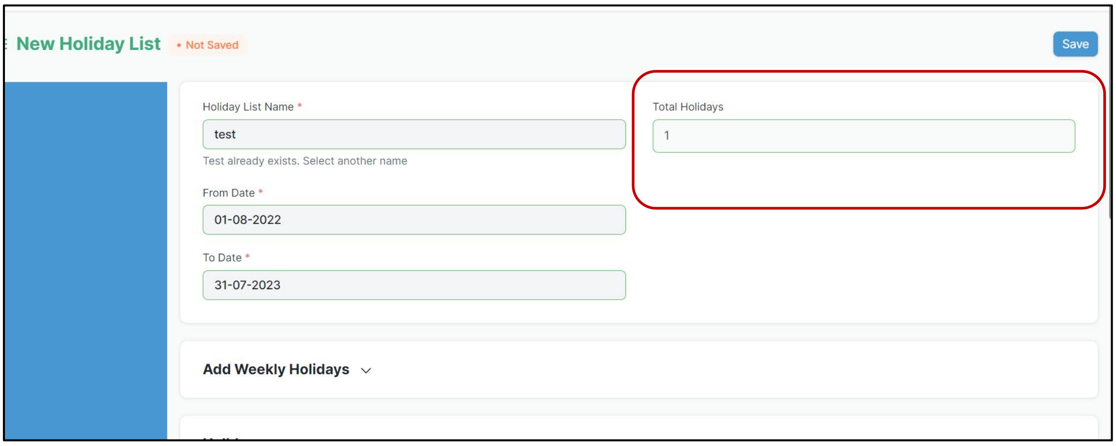

Figure 8: Total Holidays

2.3. Holiday List Import

a. Go to the Holiday List
b. Click on the Menu
c. Select the Import option
d. Click on the + Add Data Import button

e. Select Holiday List “as the Document Type
f. Select “Insert New Records” as Import Type

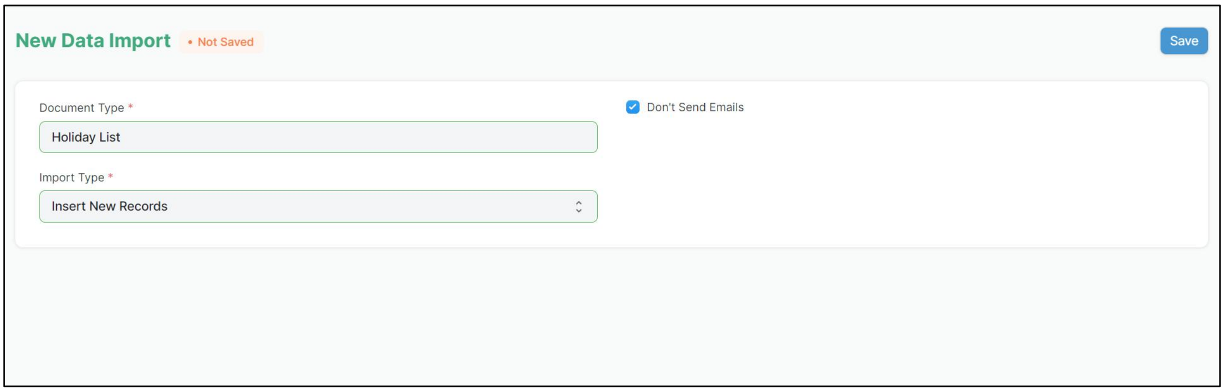

Figure 9: Import Holiday List

g. Click on the “Attach” button
h. Click on “My Device” button to browse the Holiday List file saved in local drive
i. Click on the Upload button
j. Click on the Save button

3. Leave Type

Leave Type refers to the types of absences that an employee can choose to use while submitting a leave application.

Home > SOUL HR > Leaves > Leave Type

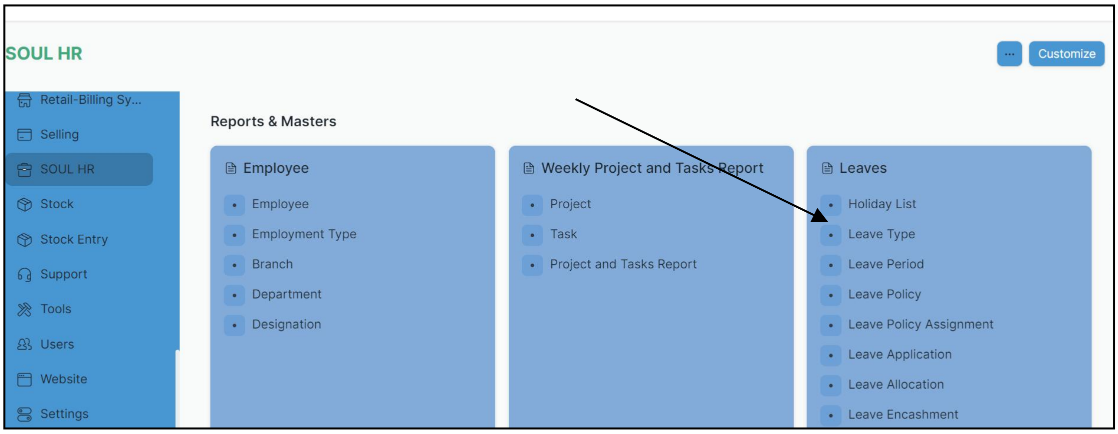

Figure 10: Leaves>Leave Type

3.1. Leave Type Import

a. Select Leave Type
b. Click on the Menu
c. Select the option to import option
d. Click on the + Add Data Import button
e. Select "Leave Type" for Document Type
f. Select "Insert New Records" for Import Type
g. Click on the "Attach" button
h. Click on "My Device" button to browse the Holiday List file saved in local drive
i. Click on the Upload button
j. Click on the Save button

4. Leave Policy

The number of leaves that an employee in a company is entitled to within a leave period is known as the Leave Policy

Home > SOUL HR > Leaves > Leave Policy

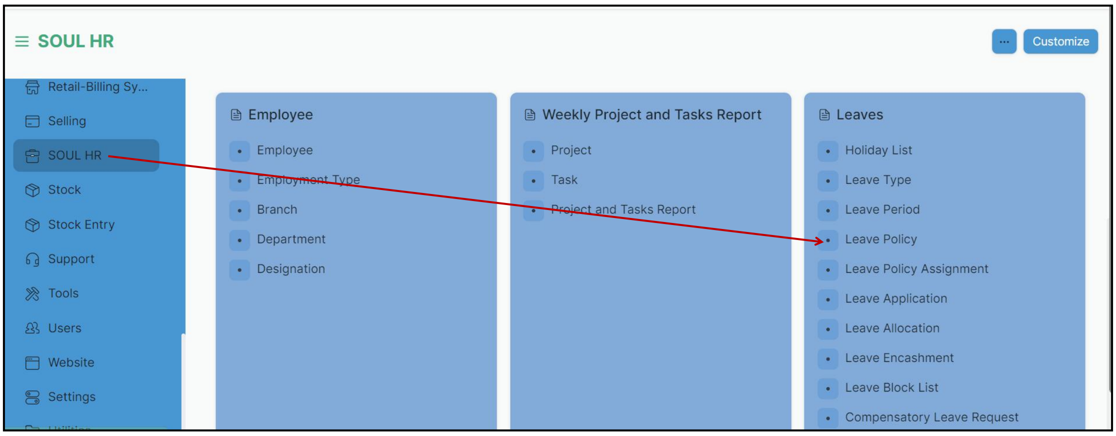

Figure 11: Leave Policy

4.1. New Leave Policy

a. Select Leave Policy
b. Click on the + Add Leave Policy
c. Enter a value for Leave Type
d. Enter value for Annual Allocation
e. Click on the Save button

4.2. Leave Policy Import

a. Select Leave Policy
b. Click on the Menu
c. Click on the import option
d. Click on the + Add Data Import button
e. Select "Leave Policy "as Document Type
f. Select "Insert New Records" as Import Type
g. Click on the "Attach" button
h. Click on "My Device" button to browse the Leave Policy file saved in local drive
i. Click on the Upload button
j. Click on the Save button

5. Leave Policy Assignment

Leave Policy Assignment is used to assign leaves to employees based on created policies

Home > SOUL HR > Leaves > Leave Policy Assignment

Prior to adding a leave policy assignment, the following must be created:

- ✓ Employee
- ✓ Leave Policy

5.1. Adding Leave Policy Assignment

a. Go to Leave Policy Assignment
b. Click on the + Add Leave Policy Assignment
c. Select an Employee
d. Select Leave Policy
e. Select Assignment based on the following as needed:
   - If "Assignment based on" is set to Leave Period, you need to select the applicable Leave Period. The Effective from and Effective To dates will be set automatically based on the Leave Period selected.
   - If "Assignment based on" is set to Joining Date, the Effective From date will be set to the employee's Date of Joining.
   - If "Assignment based on" is left blank, then you will have to set the Effective from and Effective To date manually

f. Click Save and Submit

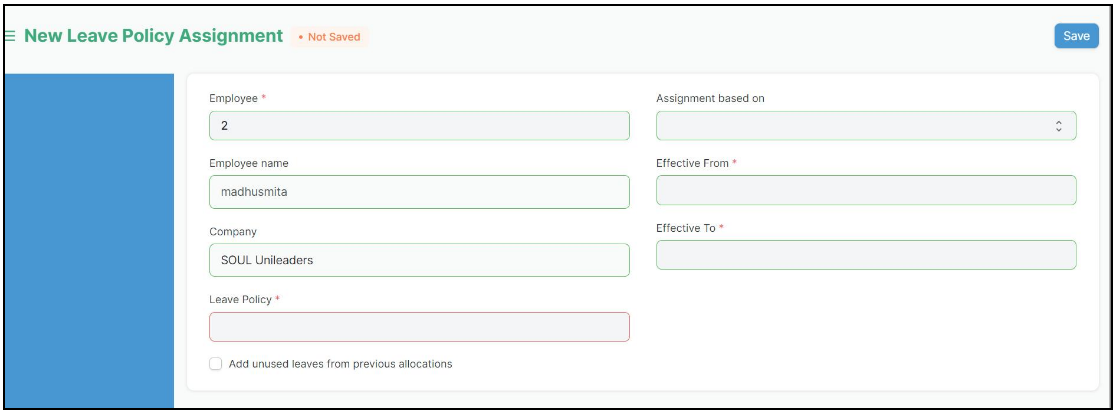

Figure 12: Enter Leave Policy Assignment

On submission, Leave Allocation documents would be created automatically based on the Leave Policy as shown below

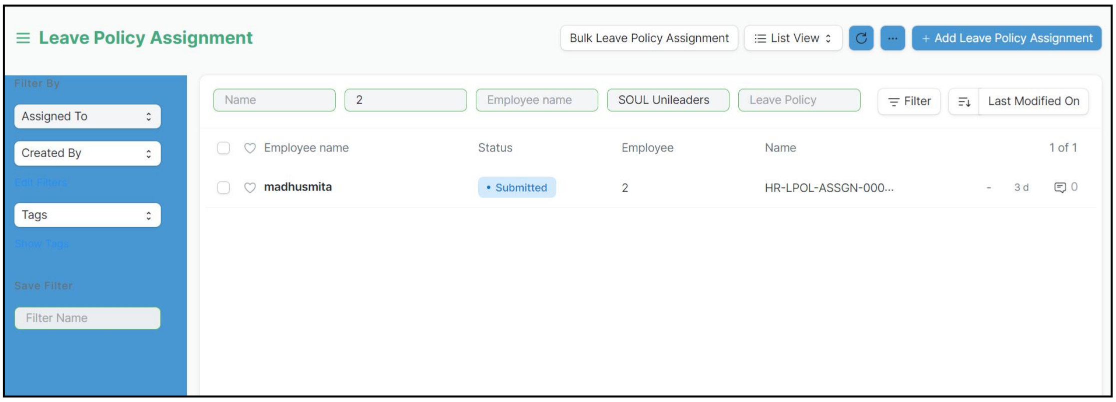

Figure 13: Leave Policy Assignment list

6. Leave Allocation

Leave Allocation enables you to allocate a specific number of leaves of a particular type to an Employee

Home > SOUL HR > Leave Allocation

6.1. Import Leave Allocation

a. Go to Leave Application list view screen
b. Click on three dots 
c. Click on Import
d. Click + Add Data Import
e. Select Import Type as "Insert New Records"
f. Click Save
g. Click Attach
h. Click My Device
i. Browse the file to import
j. Click Upload

k. Click Save

7. Employee

An individual who works as part -time or full-time under a contract of employment and has recognized rights and duties of your company is your Employee

Home > SOUL HR > Employee

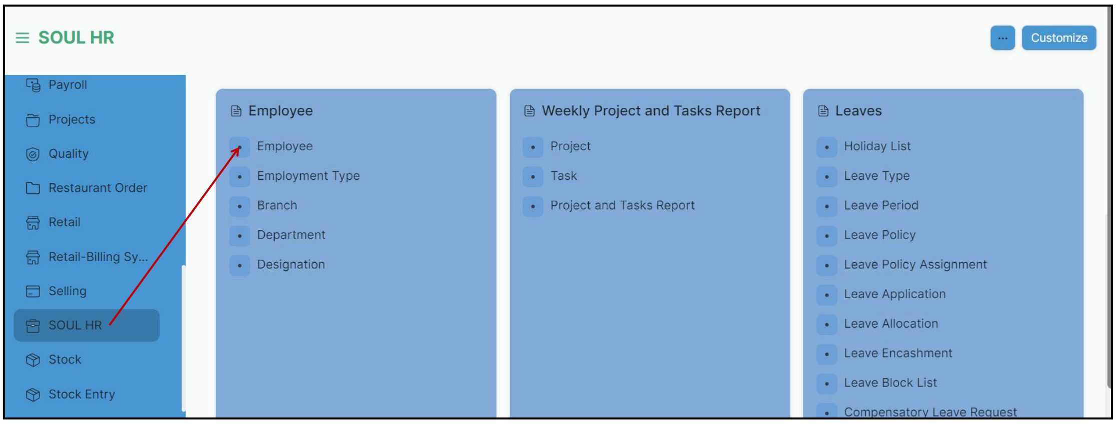

Figure 14: Employee

7.1. Adding an Employee

l. Go to the Employee list
m. Click on the + Add Employee
n. Enter all the required information for the employee
o. Click on the Save button

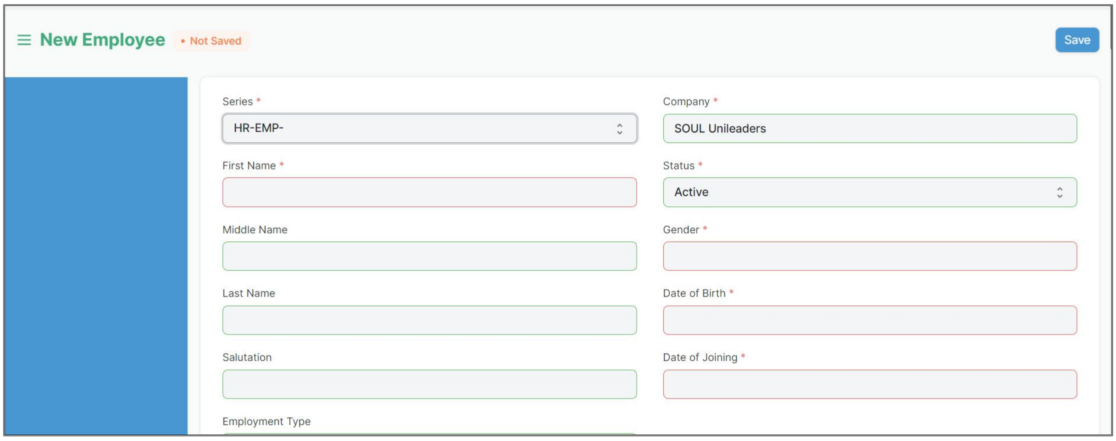

Figure 15: Add New Employee

7.2. Import an Employee

a. Go to Human Resources > Employee
b. Click on the Menu
c. Click on the Import option
d. Click on the + Add Data Import button
e. Select "Employee" as the Document Type
f. Select "Insert New Records" as the Import Type
g. Click on the "Attach" button
h. Click on "My Device" button to browse the Leave Policy file saved in local drive
i. Click on the Upload button
j. Click on the Save button

On submission, the employee records will be listed in the List View screen as shown below

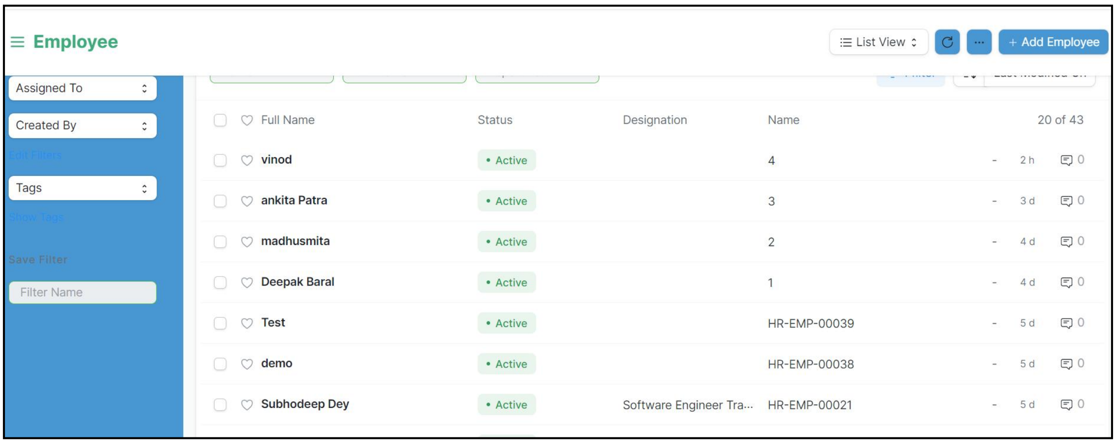

Figure 16: List of Imported Employee

7.3. Create User ID

After adding an Employee, click on the ERPNext User collapsible field as shown below

Figure 17: ERPNext User

Enter the Email-ID in the User ID text field and click Save

Figure 18: Create User ID

8. Leave Application

Leave Application is a formal document created by an Employee to use for requesting Leave from work for a particular time

Home > SOUL HR > Leaves > Leave Application

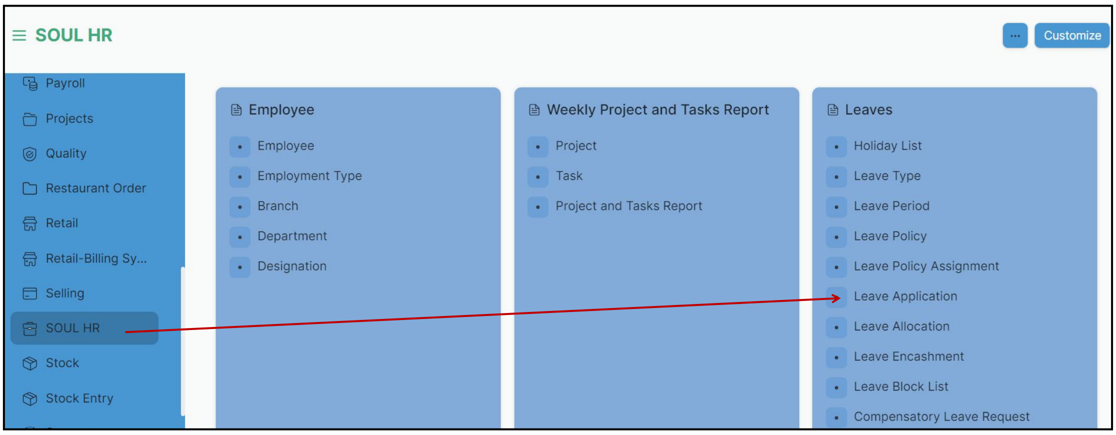

Figure 19: Leave Application

8.1. How to Create Leave Application as an Employee

The following are the steps to create and submit a leave application:

a. As an employee log in and go to the Employee list screen
b. Click on the + Add Leave Application button

c. Select or enter the required information
d. Click on the Save button

On submission, an email notification is sent out to following people:

- ✓ Employee
- ✓ Approver
- ✓ HR

Employee's leave application record will be highlighted in Open status in the List View as shown below

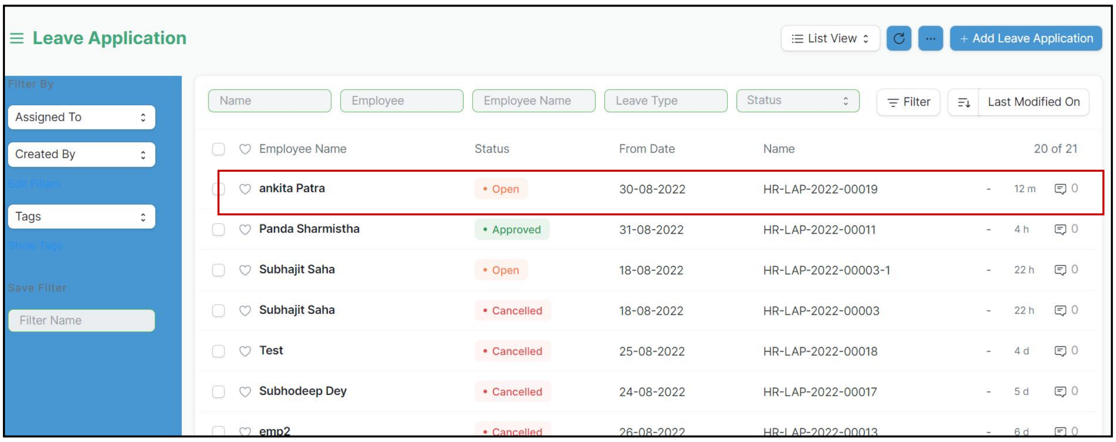

Figure 20: List of Leave Application Status Open

8.2. Approve a Leave Application

a. As an Approver go to the Employee list screen
b. Click on the employee's name whose leave application status is "Open"
c. Select status as "**Approved**"
d. Click on the Save button
e. Click on the **Submit** button
f. Click on the back button

On **Submission**, employee's leave application status will change to **Approved**

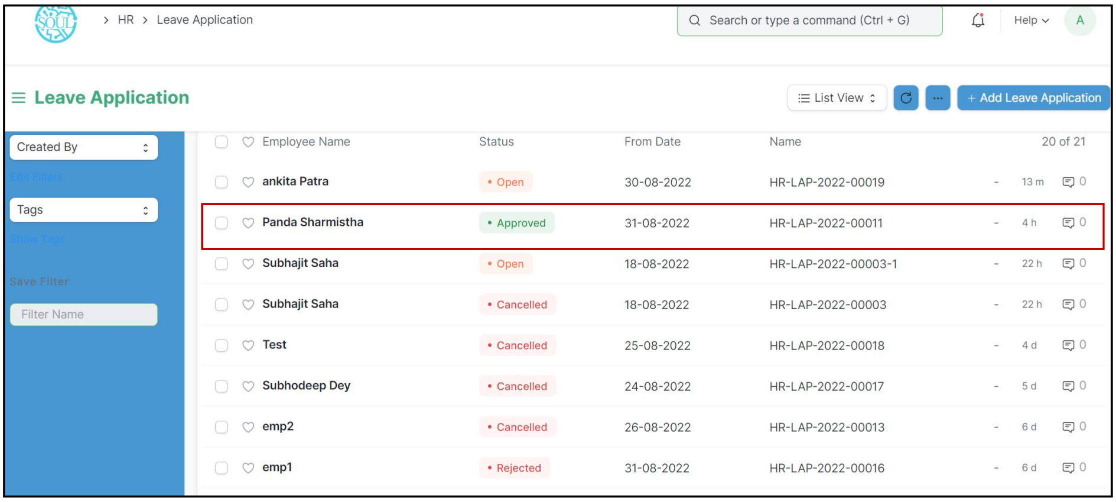

Figure 21: : List of Leave Application Status Approved

Email notifications will be triggered to the following people :

- ✓ Employee
- ✓ Approver
- ✓ HR

8.3. Cancel a Leave Application

8.3.1 When Leave Application is Approved

a. As an Approver go to Employee list screen
b. Click on the employee's name whose leave application status is "**Approved**"
c. Click on the Cancel button
d. Click on Cancel All button
e. Close the window

On Cancellation, email notifications will be triggered to following people :

- ✓ Employee
- ✓ Approver
- ✓ HR

8.3.2. When Leave Application is Open

a. As an Approver go to Employee list screen
b. Click on employee name whose leave application status is "Open"
c. Select status as "**Cancelled**"
d. Click on the Save button
e. Click on the **Submit** button
f. Click back button

Figure 22: List of Cancelled Leave Applications

Email notifications will be triggered to the following people:

- ✓ Employee
- ✓ Approver
- ✓ HR

8.4. Reject a Leave Application

a. As an Approver go to Employee list screen
b. Click on the employee's name whose leave application status is "Open"
c. Select status as "**Rejected**"
d. Click on the Save button
e. Click on the **Submit** button
f. Click the back button

Figure 23: List of Rejected Leave Applications

Email notifications will be triggered to the following people :

- ✓ Employee
- ✓ Approver

- ✓ HR

9. Project and Task Description

A Project and Tasks Report captures number of hours spent by an employee for completion of each task.

A Timesheet can have an account of a particular employee working on multiple Tasks or Projects in a tabular format.

The feature is accessible to Employee, Approver and HR

Home > SOUL HR > Weekly Project and Tasks Report > Project and Tasks Report

9.1. Adding Project and Tasks Report

a. As an employee go to Project and Tasks Report
b. Click on the **+ *Add Project and Tasks Report***
c. Enter Employee information and Reports for Week starting (Week starting day will be **Monday**)
d. Click on the Save button
e. Click on the Add Row button
f. Click on the edit button (pencil icon)
g. Enter Project and Tasks information in the table row
h. Enter hours to weekdays field
i. Click anywhere in the screen
j. Click **Submit** button
k. Click "Yes" to permanently submit the entered information

After successful submission, the record will be visible in the List View screen.

Note : It is recommended to Submit the information by end of week to avoid Cancellation

9.2. Notifications after Project and Tasks Report are created

Email notification will be triggered to Employee and Approver

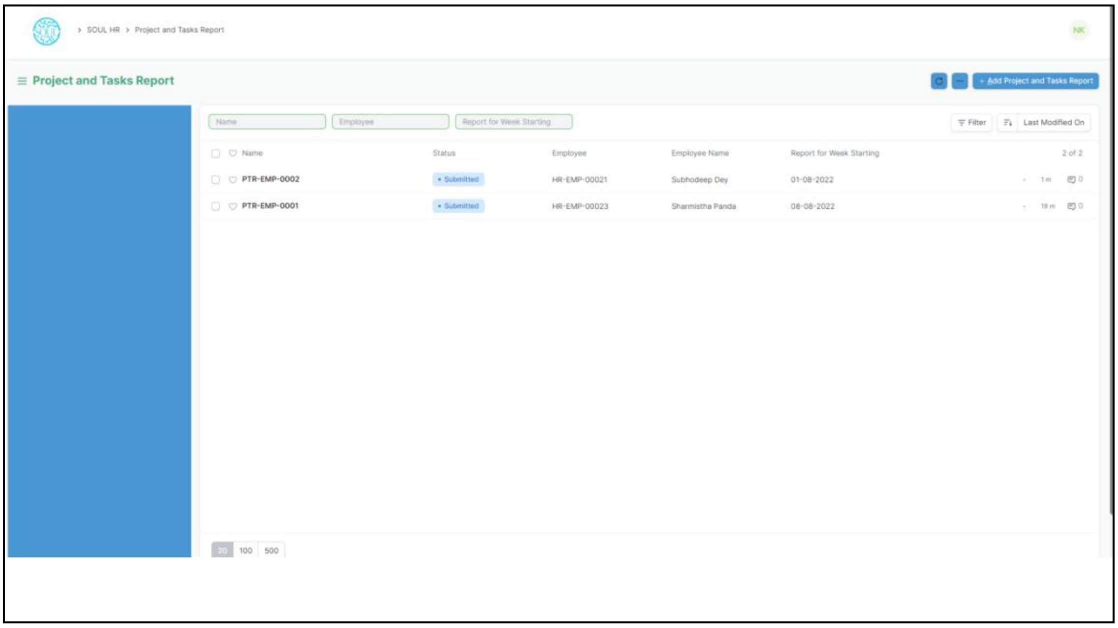

Figure 24: List of Submitted Project and Tasks

9.3. View Project and Tasks Report as an Employee

a. Login to the screen
b. As an Employee go to the Project and Tasks Report List View screen
c. Click on the Name to view the details of number of hours worked on tasks for the selected week

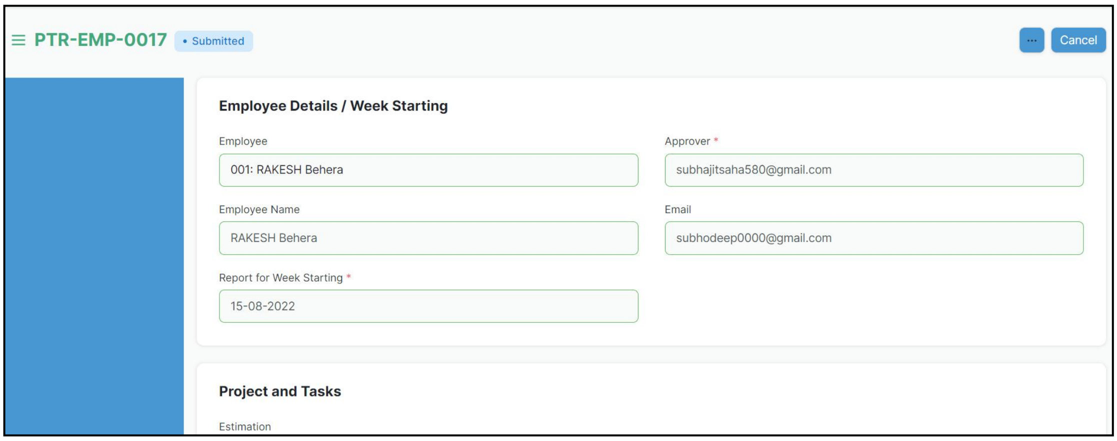

Figure 25: View of Submitted Project and Tasks as an Employee

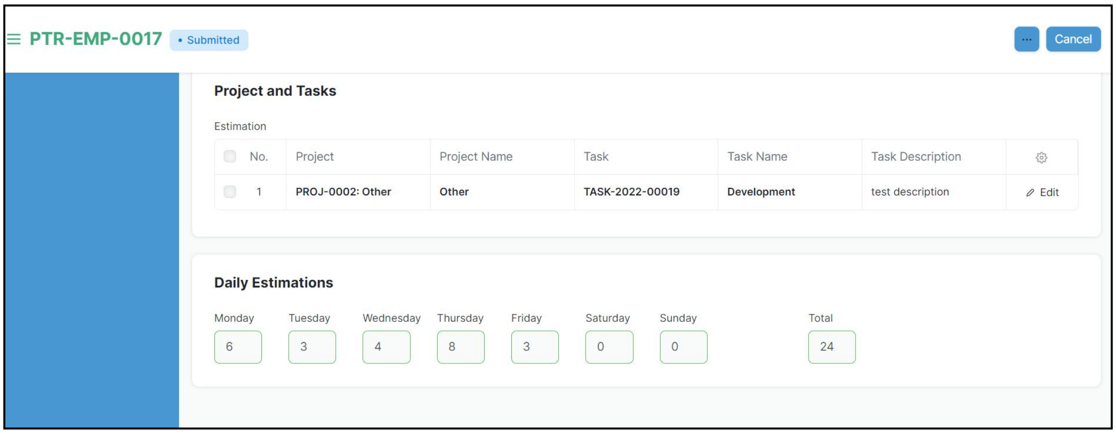

Figure 26: View of Submitted No. of Hours

9.4. View Project and Tasks Report as an Approver

a. Login to the screen
b. As an Approver go to the Project and Tasks Report List View screen
c. Approver will be able to see the Project and Tasks Report submitted by his / her team members
d. Click on the Name to view the details of number of hours worked on tasks for the selected week

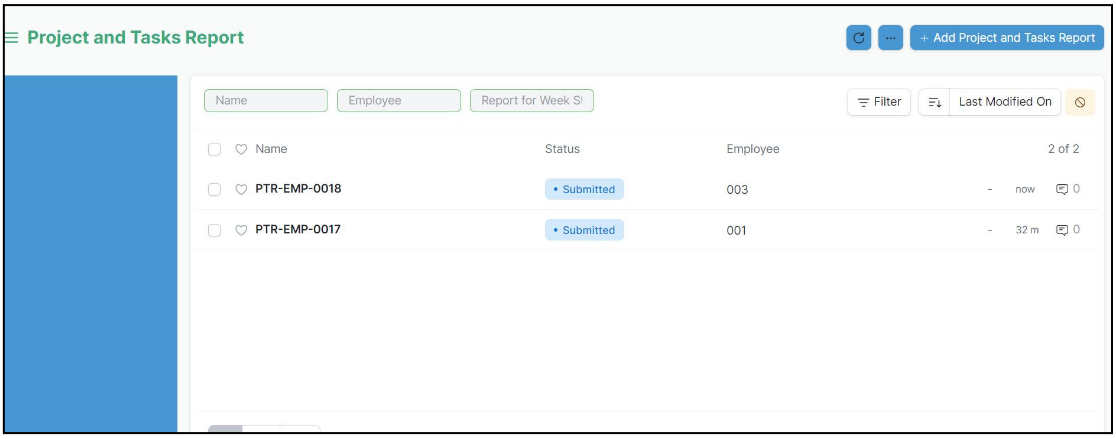

Figure 27: Project and Tasks Report List Screen for Approver

9.5. Cancel submitted Project and Tasks Report

a. Login to the screen
b. As an Approver / Employee go to the Project and Tasks Report List View screen
c. Click on the Name to view the details of number of hours worked on tasks for the selected week
d. Click Cancel button
e. Click on Yes to confirm permanent cancellation of record

On Cancellation, Project and Tasks Report record status will change to "Cancelled" as shown below

Note : The Cancellation process is not recommended as it would create duplicate records

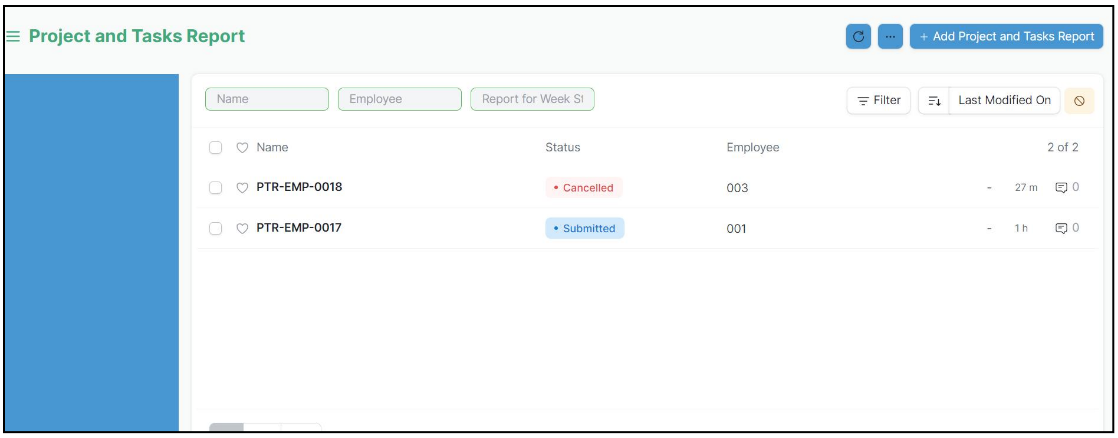

Figure 28: Cancelled Project and Tasks Report

9.6. Amend a cancelled Project and Tasks Report

a. Login to the screen
b. As an Approver / Employee go to the Project and Tasks Report List View screen
c. Click on the Name of the Project and Task Report with status as "Cancelled"
d. Click Amend button

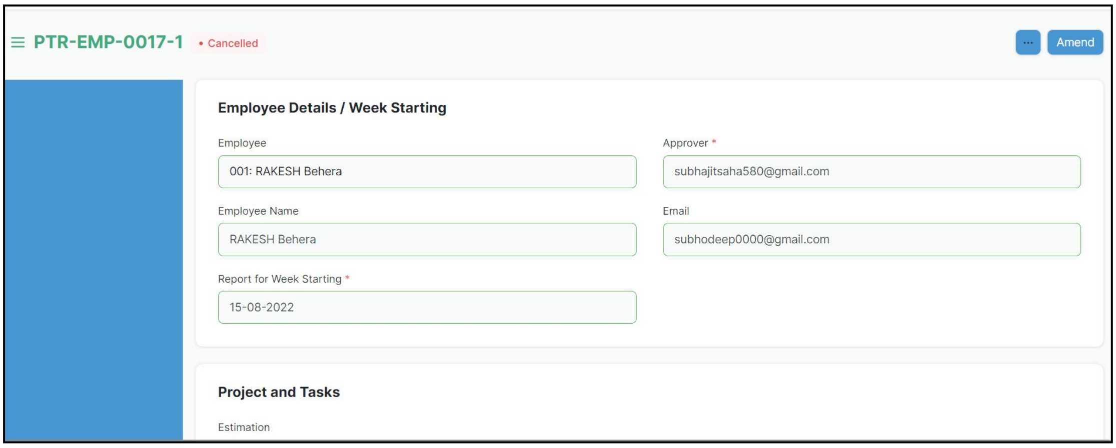

Figure 29: Amend of Cancelled Project and Tasks Report

9.7. Draft of Project and Tasks Report

a. Login to the screen
b. As an Approver / Employee go to the Project and Tasks Report List View screen
c. Click **+ *Add Project and Tasks Report***
d. Enter the required information as mentioned in Section 8.1 (from points c to i)
e. Go back to Project and Tasks Report List View screen

The saved record status will be "**Draft**" as shown below

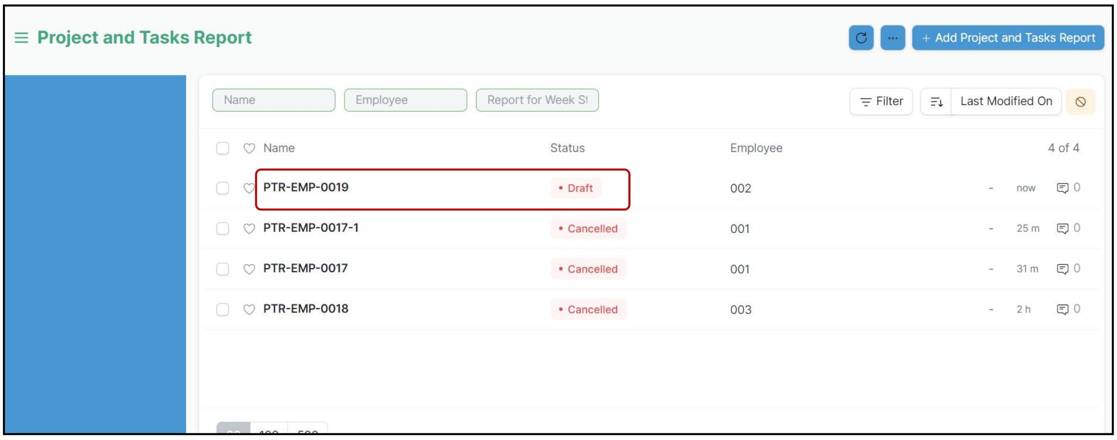

Figure 30: Draft of Project and Tasks Report

10. HR Dashboard

HR will be able to view a summary of Total number of employees, Statuses of Leave Applications, Project and Tasks Report.

Home > SOUL HR > Dashboard

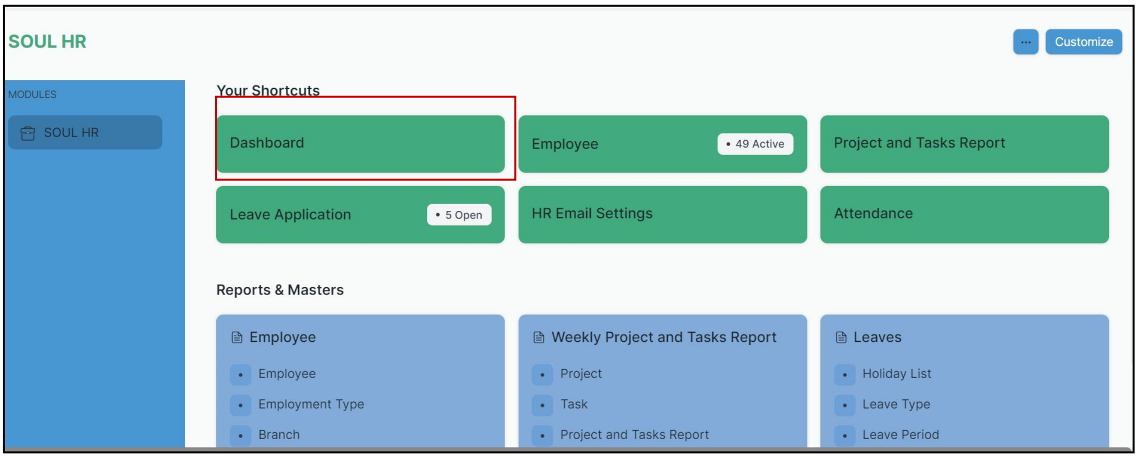

Figure 31: HR Dashboard

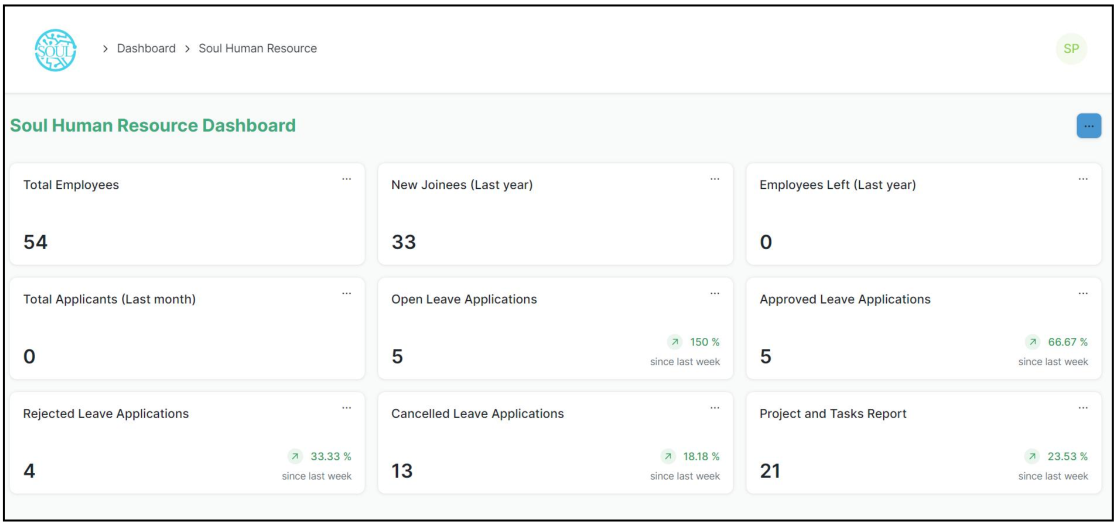

Figure 32: HR Dashboard Details