EXL Enterprise Employee Portal: In-Depth Q&A Knowledge Base (RAG-Ready)

Section 1: EXL Planet iEXL Portal Home

1.1 Portal Overview and Navigation

- **Q: What is the Planet iEXL Portal and what are its main sections?**
  A: The Planet iEXL Portal is EXL's enterprise web dashboard for all employee needs. The main menu provides access to:
  - **My Space:** Personalized dashboard of actions and shortcuts.
  - **ATLAS:** Attendance and leave management.
  - **Employee Wiki:** Company policies, FAQs, and knowledge articles.
  - **Application Hub:** Quick links to core apps like ERP, MyRydes, Payroll, Digital HR, Employee Wiki, Unified Service Desk, A-Forum, and more.
  - **Notifications/Alerts:** Important reminders and pending actions.
- **Q: What does the "Pending Actions" widget show on the homepage?**
  A: It displays any actions or items awaiting your attention, such as incomplete shifts, pending attendance, or workflow approvals.
- **Q: How can I access EXL learning programs and knowledge resources?**
  A: Click on banners or links like "AI for Leaders Program" or "EXL Employee Wiki" from the homepage or Application Hub.

Section 2: ATLAS – Attendance and Leave Management

2.1 Marking Attendance

- **Q: How do I mark daily attendance?**
  A:
  1. Click "ATLAS" in My Space or Application Hub.
  2. Click "Attendance".
  3. Click the button for "Mark Attendance".
  4. Confirm submission.
  5. If successful, your attendance for the day is recorded.

- **Q: How can I check if my attendance has been marked?**
  A: Your daily attendance appears on the calendar in the “Attendance” tab. “Present (Approved)” is marked in green; “Absent” or “Weekly Off” in other colors.
- **Q: What do the colors or icons on the attendance calendar mean?**
  A:
    - **Green:** Present (Approved)
    - **Orange:** Weekly Off
    - **Red:** Absent or Unapproved Leave
    - **Grey:** Holidays

2.2 Leave Management

- **Q: What leave types are available and what do they mean?**
  A:
    - **SL (Sick Leave)**
    - **CL (Casual Leave)**
    - **PL (Privilege Leave)**
    - **Compensatory Leave**
    - **Adoption, Sabbatical, Paternity, Compassionate, OH/Other Holidays, etc.**
      Each type has its own policy and eligibility, available in Employee Wiki.
- **Q: How do I apply for leave?**
  A:

1. Go to ATLAS > Leave > Apply Leave.
2. Enter From and To dates, No. of Days, select Leave Type, add Purpose.
3. Optionally select weekly offs or additional options.
4. Submit the form.

- **Q: How to approve/reject leave as a manager?**
  A:

1. Go to ATLAS > Leave > Approve Leave.
2. Review pending requests.
3. Click to approve or reject with comments.

- **Q: How to check and download my leave balance?**
  A: Click "View Leave Balance" in ATLAS. The right-hand panel lists leave types and available balance.
- **Q: How do I apply for other types of holidays or special leaves (maternity, OH, etc.)?**
  A: Use the relevant option in the "Leave" sidebar (e.g., Apply Maternity Leave – Supervisor, Apply OH/Other Holidays, View Bank Holiday Details).

2.3 Team and Supervisor Features

- **Q: What are "Define Alternate Supervisor" and "Team Holiday Calendar"?**
  A:
  - "Define Alternate Supervisor" lets you assign another manager to approve leaves in your absence.
  - "Team Holiday Calendar" shows upcoming holidays for your team.
- **Q: How do I record or approve compensatory leave?**
  A: Use "Record Compensatory Leave" or "Approve Compensatory Leave" in the sidebar. Enter the details as per company policy.

2.4 Policies, Statutory Requirements, and Help

- **Q: What are the statutory break requirements for employees?**
  A:
  - **Daily Break:** Minimum half-hour rest after max five hours' work (location-specific).
  - **Weekly Off:** At least one weekly off after six continuous working days.
- **Q: What if my attendance or leave is marked incorrectly?**
  A: Raise a correction request via your supervisor, or log a ticket with the Unified Service Desk.
- **Q: Where can I find detailed leave policies?**
  A: Employee Wiki or "Policies" section.

Section 3: Application Hub – Main Apps

3.1 Unified Service Desk

- **Q: What is the Unified Service Desk for?**
  A: Raise IT, HR, or facility support tickets. Choose the correct category, describe your problem, and submit. Track status under "My Tickets".

3.2 Employee Wiki

- **Q: How do I search for HR policies or process documents?**
  A: Use the “Search” bar on Employee Wiki. Filter by category (HR, IT, Operations, etc.). Download or read articles as needed.

3.3 Payroll and Salary

- **Q: How can I download my payslip or salary statement?**
  A: Application Hub > Payroll and PaySlip (EXLSmartPay). Choose the month/year and download PDF.

Section 4: MyRydes – Employee Transport

4.1 Booking a Cab

- **Q: Step-by-step: How do I book a cab for work?**
  A:
    1. Open Application Hub > MyRydes.
    2. Go to “Book a Cab”.
    3. Select Facility, Request Dates, Trip Type (e.g., pickup/drop), Shift Type.
    4. Click “Create New Request”.
    5. Confirm details and submit.
- **Q: How do I reschedule or cancel a booking?**
  A: Go to “Reschedule Cab” or “Cancel Cab” in MyRydes, select the trip, and follow prompts.
- **Q: What is the “Self Booking Schedule”?**
  A: Shows cabs you’ve scheduled yourself (rather than through admin).

4.2 Reimbursement and Asset Movement

- **Q: How do I raise a transport reimbursement?**
  A: “Raise Reimbursement” in MyRydes. Fill in trip details, upload receipts, submit.
- **Q: How do I check reimbursement status?**
  A: “Raise Reimbursement” tab lists claims with columns for Employee ID, Trip Date, Amount, Status.

4.3 Policies and Restrictions

- **Q: Are there limitations to booking cabs?**
  A: Yes, e.g., bookings only for next 8 days, only for registered facilities. Shown on the booking page.
- **Q: What if my facility or trip type is not listed?**
  A: Contact the admin or raise a ticket via Unified Service Desk.

Section 5: ERP / iExpense – Expense Reimbursement

5.1 Getting Started

- **Q: How do I start the expense reimbursement process?**
  A: Application Hub > ERP > iExpense Report Creation.

5.2 Expense Report Workflow

- **Q: What are the steps to create a new expense report?**
  A:
  1. In the ERP, click "Create Expense Report".
  2. Select an "Expense Template" (e.g., Travel, Office, Project).
  3. Fill out required fields:
     - *Purpose* (business justification)
     - *Project* (code or name)
     - *Delivery Location*
     - *Task Number*
     - *Submitted By*, *Paid on behalf* (if applicable)
  4. Upload receipts as required.
  5. Save or submit.
- **Q: What information is needed for reimbursement?**
  A: Detailed receipt, reason for expense, correct project/task, dates, amounts, and any supporting docs.
- **Q: How do I track, update, or withdraw an expense report?**
  A:
  - "Track Submitted Expense Reports" for status (Pending, Approved, Rejected, etc.)
  - "Update Expense Reports" to change or correct reports.

    - “Withdraw” or “Delete” if you need to cancel a report.

- **Q: What happens if my expense is rejected?**
  A: You will receive a notification with a reason. You can edit and resubmit, or contact your approver for clarification.

- **Q: How can I duplicate a previous expense report for similar expenses?**
  A: Use the “Duplicate” option next to a past report.

- **Q: How do I export or import a spreadsheet of expenses?**
  A: Use “Import Spreadsheet” or “Export Spreadsheet” for bulk upload or data backup.

5.3 Notifications and Approvals

- **Q: How do I know if my manager approved my expense?**
  A: Status will update to “Approved”, and you may receive an email or portal notification.

- **Q: Can I check who is the current approver?**
  A: Yes. The “Current Approver” column shows the name/role of the person who needs to take action.

5.4 Policy and Compliance

- **Q: What are the company policies for reimbursable expenses?**
  A: See the Employee Wiki for detailed policies: what is reimbursable, required documentation, approval workflows, timelines, and limits.

- **Q: Are advances or per-diem payments handled in iExpense?**
  A: Yes, you can attach receipts against per-diem payments and specify details in the “Additional Information” section.

- **Q: What currencies can be reimbursed?**
  A: INR for India-based employees.

5.5 Common Issues

- **Q: Why can’t I submit my report?**
  A: Check for missing required fields, unsupported file types for uploads, or exceeding policy limits.

- **Q: What if I made a mistake in my claim?**
  A: Use “Update” to modify before approval. If already approved, contact finance.

- **Q: My expense report is stuck, what should I do?**
  A: Contact your current approver or raise a ticket via Unified Service Desk.

Section 6: General Troubleshooting & Tips

- **Q: What should I do if I am unable to log in?**
  A: Check your credentials, reset your password if needed, or contact IT support.
- **Q: The portal is slow or some buttons don't work.**
  A: Try refreshing the page, clear cache, or use a different browser. If issues persist, contact IT.
- **Q: Who should I contact for unresolved issues?**
  A: Unified Service Desk is your primary support channel for IT, HR, and facility problems.