



EazeWork

EazeHR – HR and Employee Self Service

User Guide

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Preface

This document is meant to be used as a User Guide by users of EazeHR application.

Application Administrators will find useful information on how to configure EazeHR and Application Users will find this guide handy to answer most of their queries.

Document Design

Each chapter is designed as a unit and contains all the information on that aspect of the application. Within the chapter are sections and sub-sections. Use the hyperlinks to go to any related topic to understand the other related aspects of the application design and use.

Conventions

Text Type	Description
<u>Quick help on this</u>	Maroon underlined text is used to highlight a hyperlink in the application which will take the User to another page or grid
www.eazework.com	Hyperlinked blue text will take the user to either some other section within the document or to the application page if the reader is online and has logged in
<input type="button" value="Add User"/> <input type="button" value="Deactivate"/>	Action buttons. These are buttons in the application which are used to perform actions.

Getting More Help

For support and assistance please email to support@eazework.com.

Feedback

We would like to hear from you. Please send us your comments and feedback on the application or any aspect to feedback@eazework.com. Please be as descriptive as possible while giving this feedback.

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Introduction to HR Application

Welcome to EazeWork's HR application. Understand the basic features and functionalities supported and how to start using it.

Welcome to EazeWork's Human Resource management application. HR application is designed to support the HR and Administrative processes of any company. With the help of this application Employees and their Managers would be able to handle processes covering all aspects from the time and employee joins; their day to day requirements and also the resignation, retirement processes. These company-wide processes are managed on a day to day basis by providing flexible work-flow, business based configurability, alerts and role based access to the Employees, Managers and Administrators of your company.

With the help of the application all the employees are able to have much better visibility and control on various aspects like Employee Data, Leaves, Expense Management, Company Assets, Transfers, Employee joining and leaving. Critical HR information like Employee Information, Organization Structure, Job Description and Statutory Forms are all also managed and maintained through this application.

Processes in HR Application

In release 1.0

Employee and HR Information	- Y
Organization Structure / Department and Office Locations	- Y
Employee Joining Formalities	- Y
Leave Management (Request, Withdrawal)	- Y
Expenses and Reimbursements (including Budget Control)	- Y
Location Transfers	- Y
Department Transfers	- Y
Manager Transfers	- Y
Company Asset Management	- Y
Standard Reports	- Y
Attendance and Timesheet	- Y
Email and Dashboard Alerts	- Y

Customizations available

Leave Policy Customization	- Y
Leave and Working Day Calendars	- Y
Approval Workflow	- Y

Planned for Future Release

Leave Encashment
Employee Separation (including final settlement)
Performance Management (including Salary increase)
Recruitment Planning and Tracking
Development Plans Planning and Tracking
Expense Policy Customization
Integration with Payroll
Customized Reports

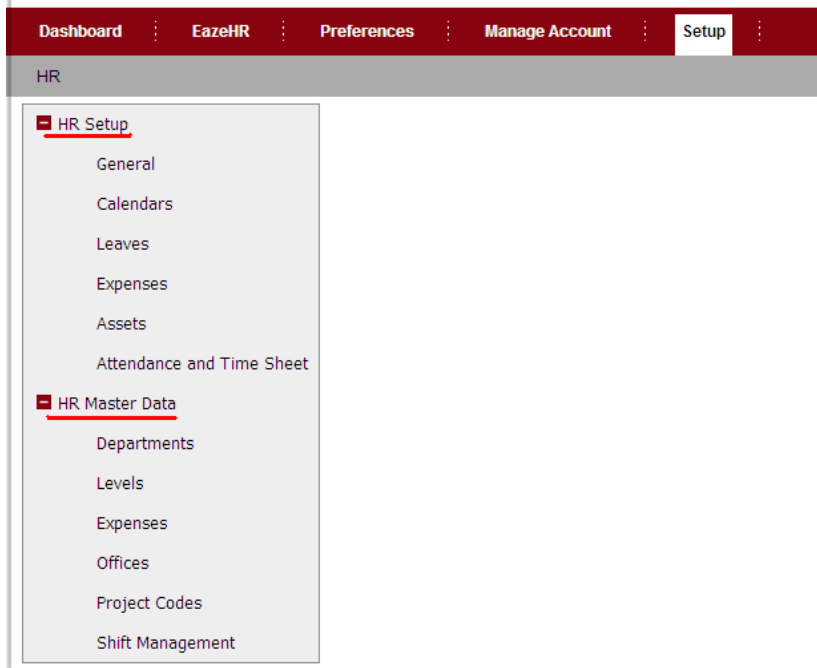
See Also

[Types of License](#)

[Setting up and Using HR Application](#)

Application Features

Setup and Configurability



All EazeWork applications can be configured to meet some specific business requirements. These configurations are specific to your setup and can be changed at any time. Most of the configuration is handled through Setup. Setup is an important activity which needs to be done upfront and also updated if there are changes in the requirements. See [HR Setup](#) for more details on this important section.

Another important activity which can be done in Setup is Master Data creation. See [HR Master Data](#) for more details.

Preferences

As a User you can setup your personal preferences and also manage your password through this section. See [Preferences](#) for more details.

Application Administrators can add / delete Users and control role based access from [Manage Subscriptions](#) section.

Mouse-over Commands

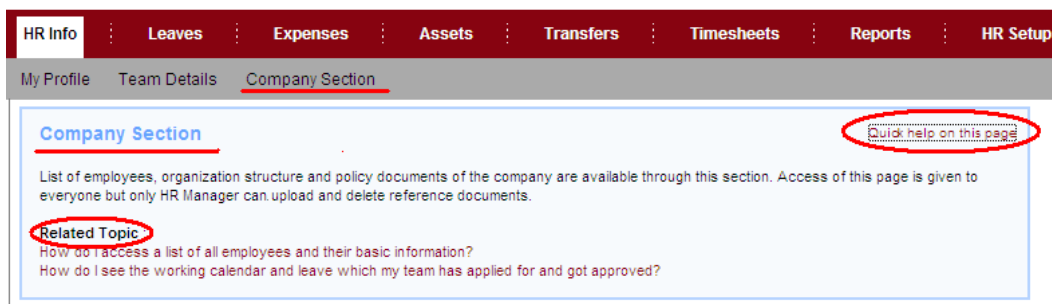
Mouse-over commands allow Users to perform some actions without going to the details page. This functionality should be used when Users do not want to view details but are sure of their actions and can complete them on the summary table itself.

Table Filters

Department Name	Employee Name	Employee Code	Designation	Location	Phone
Development	Vivin	TPC9		TPC,Delhi	
Development	John	TPC2	Director-Application Dev	TPC,Delhi	
Development	Paul	TPC7		TPC,Delhi	
Development	Tony	TPC8		TPC,Delhi	

This feature allows to quickly narrow down the data from a bigger data set. You can enter a text string in the box on the top of the column and the table data will get filtered down to show only the rows which have the matching text (in the same column).

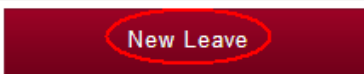

On Screen Help



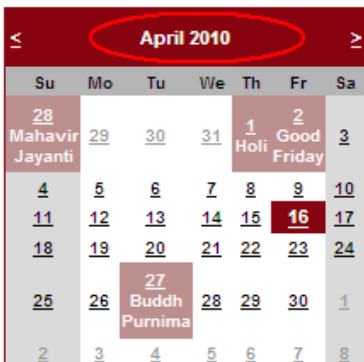
The screenshot shows a navigation menu with options like HR Info, Leaves, Expenses, Assets, Transfers, Timesheets, Reports, and HR Setup. The 'Company Section' is selected, displaying a help page with a 'Quick help on this page' link and a 'Related Topic' section.

Each page is provided with a context specific help which provides Users with basic information about the page. This can be accessed by clicking on [Quick help on this page](#) link. Additional information can be accessed through Related Topics.

New Button, Quick Links and Calendar

- Create New Leave Request
- Approve Leave Request
- Withdraw Leave



- Possible Actions**
- A New Request can be created from the button on the right pane
 - Quick links can take Users to tasks which are frequently done
 - Users can view Calendars which will show Holidays and Leaves applicable to them

Roles in HR Application

EazeHR is a work-flow based application and an understanding of the various roles and their function is necessary before the application can be fully used. There are two types of roles – Unique Roles and Non-unique Roles. Unique Role can be given to only one User at a point of time while Non-unique Role can be given to multiple Users at any point of time.

User

This is the role given by default to all the subscribers of the application including the Application Administrator. Unless you are a User you cannot log into the system. All other roles are in addition to User role. In a way the User role is same as a typical Employee in the company, first you have to be an Employee before you can be anything else. As an EazeHR user you can update your records, request for a leave, submit an expense reimbursement, submit a resignation, view reports and do other tasks. This is a Non-Unique Role.

Application Administrator

Application Administrator is the most important role. He is responsible for various tasks like – managing the Application setup, adding / deleting Users, managing roles and access of Users and interacting with the EazeWork Customer Manager for maintenance and other tasks. It is a Unique Role i.e. only one User can be Application Administrator at any point of time. This is a common role across applications, i.e. if you subscribe to Payroll and Sales also the Application Administrator role is handled by one person.

CEO

This role is given to the head of the company. As the CEO he is on the top of the organization hierarchy and responsible for some key processes. He also is able to view most of the data in the system through reports. This is a Unique Role.

Manager

Those users who have been assigned the responsibility of managing one or more Employees are called Managers, there can be multiple levels of Managers but CEO is the senior most level. A CEO will not have any Manager in the system. Each Employee can have only one Manager but a Manager can have more than one Employee (User) assigned to him. Managers are responsible for approvals of Leave, Expenses and also create request on behalf of the Employees for Transfers and Assets. Most of the processes in the application are managed between User and Manager. This is a Non-unique Role.

HR Manager

HR Manager is in-charge of ensuring the compliance of company policy on various HR processes. There can be only one HR Manager in the application.

Department Head

Each Department in the company has a designated Department Head. Department Head is responsible for ensuring the following

- Expenses are controlled as per the budget
- Employees are hired as per Department requirement
- Performance evaluation of employees and associated Salary changes are managed smoothly
- Company Assets which are owned by the Department are tracked and utilized properly

This is a Non-unique Role.

Account Head

This role is used in the application to ensure that the budgets which are given to Departments are controlled and to keep a track on overall spending. There can be more than one Account Head in the company, besides controlling the expenses at the overall Department level the Account Head also can get involved in expense approvals on a case by case basis. This is a Unique Role.

Office Manager

Office Manager is responsible for managing the Company assets and ensuring that Employees who are leaving the company are completing the Administrative formalities. This is a Unique Role.

Accountant

Accountant role is given to the persons who are responsible for the final validation of Expenses and disbursement of payments. This is a Non-unique Role, i.e. there can be multiple Users mapped to Accountant role.

Note : Manager and Department Head roles is not assigned or removed using Manage Subscriptions but are automatically added to Users who are mapped as Managers and Department Heads during the Setup process.

Types of Licenses

There are two types of licenses for the application trial and paid. A trial license is useful for startups and small companies and also for larger companies who want to try out the application before deciding to buy. For HR three different editions are available for paid users, these are Lite, Standard and Enterprise.

Features which are available in the various editions and differences are detailed below.

	Trial	Lite	Standard	Enterprise
General				
Number of Users	10	Upto 50	Upto 200	More than 200
Space per User	5 MB	15 MB	25 MB	40 MB
Bandwidth per User (download and upload per month)	10 MB	20 MB	30 MB	40 MB
Common Features				
Configurability	Y	Y	Y	Y
Customizable Workflow	N	N	Y	Y
Multiple Users with System Roles	N	N	Y	Y
Email alerts	N	N	Y	Y
Dashboard alerts	Y	Y	Y	Y
Standard Reports	Y	Y	Y	Y
Custom Reports	N	N	Y	Y
Export, Print Reports	Y	Y	Y	Y
HR Processes				
Single Calendar	Y	Y	Y	Y
Multiple Calendars	N	N	Y	Y
Shift Management	N	N	Y	Y
New Hire Onboarding	Y	Y	Y	Y
Basic HRIS	Y	Y	Y	Y
Comprehensive HRIS	N	N	Y	Y
Asset Management	Y	Y	Y	Y
Departmental Asset Control	N	N	Y	Y
Employee Transfers	Y	Y	Y	Y
Expenses and Claims	Y	Y	Y	Y

Basic Attendance	Y	Y	Y	Y
Attendance with timestamp	Y	Y	Y	Y
Overtime / Undertime tracking	N	N	Y	Y
Timsheet with approval workflow	Y	Y	Y	Y

Besides these differences there also are differences in services and other aspects. For more details you can refer to <http://www.eazework.com/apps/ess.aspx>.

See Also

[Application Features](#)

[Setting up and Using HR Application](#)

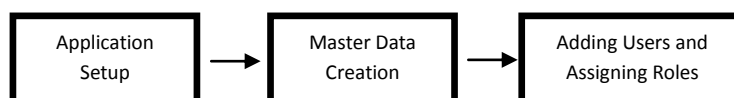
For Application Administrators – Application Setup and Account Management

Welcome to EazeWork’s HR application. As an Application Administrator you have a critical role to play, understand how to start using this application.

Setting up and Using HR Application

This section explains how to manage the initial Setup and adding Users.

Three activities have to be completed before the application can be used by the Users. These activities can be completed by [Application Administrator](#) or can be done by EazeWork Customer Manager also. Please email us at support@eazework.com to find out who is the Customer Manager for your company (only available to paid users).



1. Application Setup

During this activity the Application Administrator of the company configures the Application with the help of EazeWork Customer Manager. This configuration ensures that the application is mirroring the business process of the company to the extent possible.

Application Setup can be changed at any point of time in future but if the change has an impact on the data or transactions then the associated changes have to be managed.

2. Master Data Creation

Department Names, Seniority levels, Leave policy, Expense Heads and Sub-heads, Asset Categories are some examples of Master Data which needs to be created by the Application Administrator before the end users can start using the application.

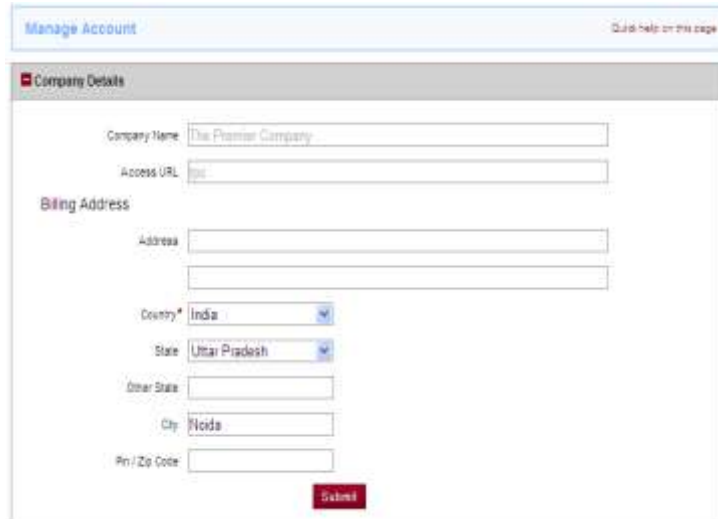
3. Adding Users and Role Assignment

In the final step the Application Administrator adds Users and gives appropriate roles to these Users. The Users need to validate their accounts after which they can start using the application.

Account Management

Manage Account section is accessible only to Application Administrator. Using this section the Application Administrator can add or delete users and maintain the company profile.

Account Summary



Manage Account [Quick help on this page](#)

Company Details

Company Name:

Access URL:

Billing Address

Address:

Country*:

State:

Other State:

City:

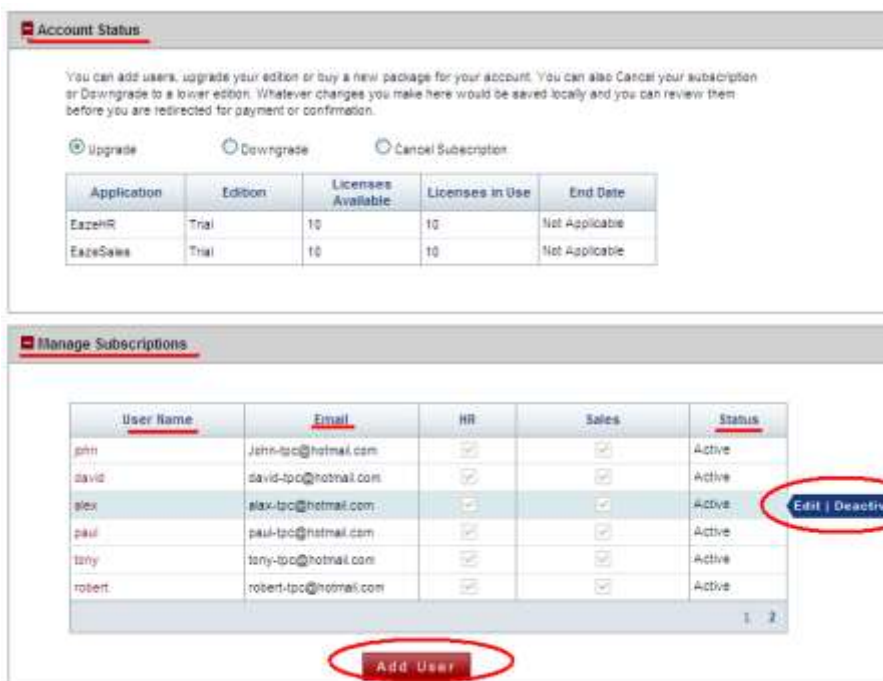
Pin / Zip Code:

Possible Actions

- You can update the billing address for your Company and view the access URL from this page.

Manage Subscriptions/ Add Users

In this Section Administrator can manage the subscription and roles of all the Users of the Company. By default all the roles in the application are inherited by the Application Administrator when he activates the subscription the first time. After that he needs to complete two critical tasks of Adding Users and Defining Roles



Account Status

You can add users, upgrade your edition or buy a new package for your account. You can also Cancel your subscription or Downgrade to a lower edition. Whatever changes you make here would be saved locally and you can review them before you are redirected for payment or confirmation.

Upgrade
 Downgrade
 Cancel Subscription

Application	Edition	Licenses Available	Licenses in Use	End Date
EazeHR	Trial	10	10	Not Applicable
EazeSales	Trial	10	10	Not Applicable

Manage Subscriptions

User Name	Email	HR	Sales	Status
john	john-tpc@hotmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active
david	david-tpc@hotmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active
alex	alex-tpc@hotmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active
paul	paul-tpc@hotmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active
tony	tony-tpc@hotmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active
robert	robert-tpc@hotmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active

1 2

Possible Actions

- You can review the Subscription details like Applications and License subscribed to, Number of Users, End date of Subscription
- You can Add Users by clicking on the button
- You can Deactivate an existing User by using the mouse-over action
- You can Edit an existing User and manage roles which have been assigned to him

Adding Users

1. Enter the email id of the User
2. Define the roles which the User is supposed to perform. By default all Users will have the User role, this cannot be removed. Any additional role can be given to them based on their profile. Refer to Section [Roles in HR](#) for more details on the different types of role.
3. Click on Save. The User gets added to the Company but his status is Not Validated. Only when he completes the [Account Validation](#) process will his status change to Validated.

Deactivating Users

As an Administrator if you Deactivate any User, the deactivated Users will not be able to access their EazeWork account. Use this feature if you want to prevent some User from accessing the application. This is a reversible process and when you Activate the User again he can start using the application.

Deactivating a User does not remove any role or links in the application, in fact except the Administrator and the User no one else gets to know that a User has been Deactivated. So all work flows where this User is linked can be initiated but will stop where action from him is required.

Role Assignment



Possible Actions

- Select the Common Roles you want to give to the User. If you select any one common role automatically the user will get access to all the applications the company has subscribed to. If there are not enough licenses available in any application then this action will not be allowed.
- Select the Application Roles you want to give to the User. Like Common roles these roles are also to be given across all the Applications where the role is available.
- You can remove an existing role from a User by deselecting the checkbox – removing the access to the application will also remove all the Application Roles which have been given to the user.

A Unique Role cannot be removed from the User to which it is assigned. Instead of this the role has to be assigned to the New User and automatically it will get removed from the previous User to which it was assigned. Refer to the section on [Roles in HR Application](#) for more information.

See Also

[Preferences](#)

[HR Setup](#)

[HR Master Data Creation](#)

[Adding Users](#)

[Role Assignment](#)

[Account Validation](#)

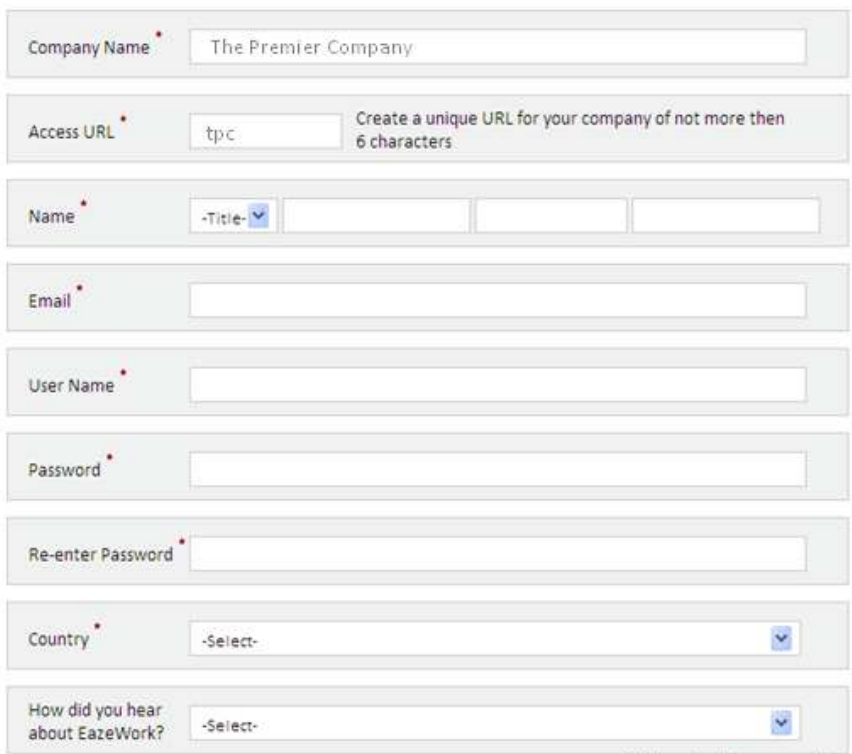
For Users – Account Validation, Application Access and Preferences

Users of the applications should read this section to understand how to validate their account, access the application and setup their preferences.

Account Validation

Access to all EazeWork applications are controlled through the unique user name which each User is asked to create. This user name is associated with a primary email which is validated during the registration process. The sequence of activities to be followed is –

1. You will receive an email in your mail box from either your Application Administrator or EazeWork Customer Manager.
2. When you click on the validation link you will be taken to the Registration page



The registration form consists of the following fields:

- Company Name ***: Text input field containing "The Premier Company".
- Access URL ***: Text input field containing "tpc". A note next to it says "Create a unique URL for your company of not more than 6 characters".
- Name ***: A dropdown menu for "-Title-" followed by three empty text input fields.
- Email ***: Empty text input field.
- User Name ***: Empty text input field.
- Password ***: Empty text input field.
- Re-enter Password ***: Empty text input field.
- Country ***: Dropdown menu with "-Select-" and a blue arrow icon.
- How did you hear about EazeWork? ***: Dropdown menu with "-Select-" and a blue arrow icon.

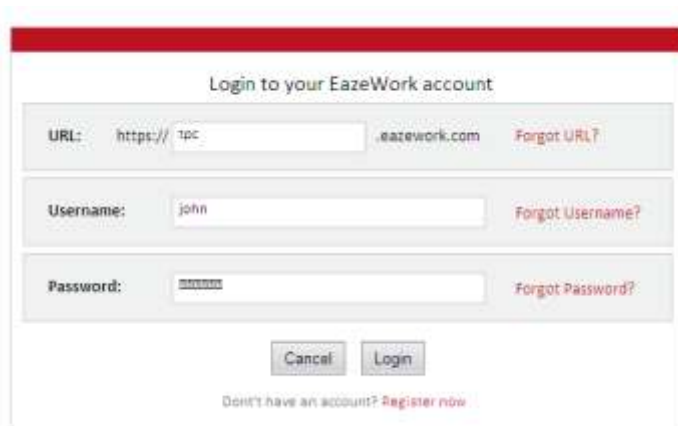
Fields marked * are mandatory

Actions to be completed

- Create a unique User name for yourself
 - Enter and reconfirm the password. Please remember this password and keep it in a safe place.
 - Accept the Terms of Use and Privacy and Security Policy. You can read the documents available on the website.
3. When you have filled up the Registration details you will be redirected to your dashboard from where you can start using the application.

Logging In

Logging on to the application has to be done through <https://www.eazework.com/login> page. When you go to this page you will see a login window.



The screenshot shows a login window titled "Login to your EazeWork account". It contains three input fields: "URL:" with the value "https:// tpc" and ".eazework.com" and a "Forgot URL?" link; "Username:" with the value "john" and a "Forgot Username?" link; and "Password:" with a masked password and a "Forgot Password?" link. Below the fields are "Cancel" and "Login" buttons. At the bottom, there is a link: "Don't have an account? Register now".

You can enter your User Name and Password and login.

Auto time-out

You will get timed out if there is no activity for a period of 15 minutes. This is done to ensure safety of your information.

Force Login

You cannot login to the application from two different browsers or two different locations – only one active session can be maintained at any point of time. If you have an active session from one location or you have been not logged out from the session for any reason and you try to login again you will get an error message “You are already logged into the application or your previous session would not have closed properly. If you click on Force Login you will be logged out from the other session. Any unsaved work there will be lost.” In such a scenario you will get a button using which you can log out from the other session and login.

Password Retrieval

If you have forgotten your password you can request a password reset. This link is available to you on the login page. You will be sent a hyperlink to your registered email using which you can reset your password.

Registration for first time Users

The sections explained above work for a User who has already been added by the Application Administrator to be a part of the application setup. If you are a new User and do not have an EazeWork registration you can go to www.eazework.com/registration and register.

Accessing the Application

Application can be accessed through multiple methods. This section explains the various application access mechanisms available to a user.

Using the Website

The default method for logging is through the website. This is explained in the previous section on Logging In.

Through email alerts

Emails are sent to users as notifications when certain actions take place in the application. For example, when an employee raises a leave request his manager gets an email with links to certain actions. On clicking on these action buttons / links the manager will be routed to the application page for completion of the action. If you are using latest browsers and have saved your login / password details you will be automatically routed to the page where the action has to be completed.

From Mobile phones

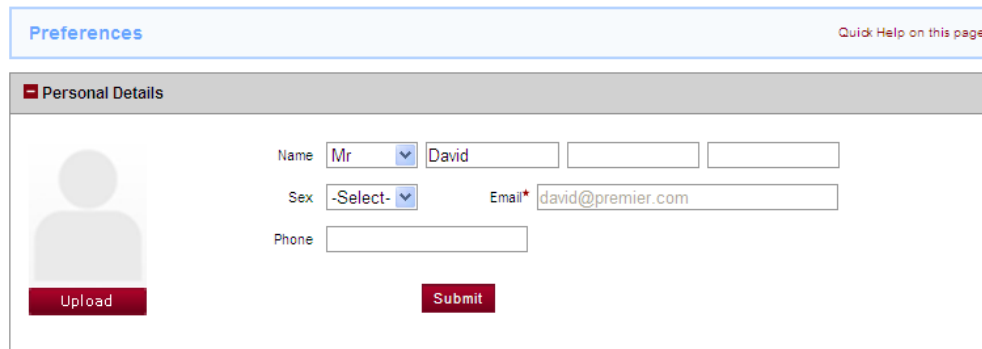
Mobile phones can be used in to access the application as a browsing device – if you have a mobile through which you can browse the internet you can use it to also browse the application.

Preferences

Preferences Module allows Users to manage their profile and password. Users can also see the roles they have access to in the HR application.

User Profile

Update and manage the User Profile from this section.



The screenshot shows a web interface for the 'Preferences' section. At the top, there is a blue header bar with the word 'Preferences' on the left and a link 'Quick Help on this page' on the right. Below this is a grey bar with a red square icon and the text 'Personal Details'. The main form area contains a profile picture placeholder on the left with an 'Upload' button below it. To the right of the placeholder are several input fields: a 'Name' field with a dropdown menu set to 'Mr' and the text 'David', followed by two empty text boxes; a 'Sex' dropdown menu set to '-Select-'; an 'Email*' field with the text 'david@premier.com'; and a 'Phone' field. At the bottom right of the form is a red 'Submit' button.

Possible Actions

- Update your Personal details, upload your photograph, update your contact details

Address Details

Home Address

Address

Country*

State

Other State

City

Pin / Zip Code

Permanent Address Same As Home Address

Address

Country

State

Other State

City

Pin / Zip Code

Here you can update your home and permanent addresses.

Applications / Roles

Roles

Role	HR	Sales
User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Support	<input type="checkbox"/>	<input checked="" type="checkbox"/>

In this section you can view the Roles you have been given but you cannot make any changes to this table and if you need any roles added or removed from your profile you should get in touch with the Application Administrator of your company.

User Name / Password

User Name and Password Maintenance

User Name

Change Password

Current Password

New Password

Confirm Password

Here you can view your User Name and update the Password. You cannot change your User Name.

See Also

[HR Setup](#)

[HR Master Data Creation](#)

[Account Management](#)

Setup

This section explains the process of Setup which is managed by Application Administrator. Setup gives the flexibility to map application processes in line with the Company requirements.

Setup section allows the Administrator to access the Setup of all applications which they have subscribed to. If you have subscribed to only EazeHR then only EazeHR will be visible from the Sub-menu. Setup for the application is divided into two parts

1. HR Setup: Here all the necessary Application Setup tasks are completed.
2. HR Master Data: Here all the required Master Data is created and maintained.

[HR Setup](#) section below covers the Application Setup and [HR Master Data](#) section covers the Master Data aspect of the application.

HR Setup

HR Setup is further divided into multiple sections. Each section is a group of activities which have mapping to a module or behavior of the application.

General Setup

HR General Setup

Are the Department numbers System generated or Manually assigned	<input type="radio"/> System Generated <input checked="" type="radio"/> Manually Assigned
Are the Employee codes System generated or Manually assigned	<input type="radio"/> System Generated <input checked="" type="radio"/> Manually Assigned
Are the Asset codes System generated or Manually assigned	<input checked="" type="radio"/> System Generated <input type="radio"/> Manually Assigned
Are the Cost Center codes System generated or Manually assigned	<input checked="" type="radio"/> System Generated <input type="radio"/> Manually Assigned
Allow HR Manager to enter all Employee Details	<input type="radio"/> Yes <input checked="" type="radio"/> No
Calendar for your Organization is	<input type="radio"/> Single <input checked="" type="radio"/> Multiple

Possible Actions

- You can decide if you want the codes / numbers which are used in the application to be created automatically or to be done manually
- Holiday Calendar: you can decide if you want to use one Calendar throughout the Company or want to have multiple Calendars linked to Locations and Levels

Note: The multiple Calendar feature is not available in Trial versions. For more details refer the Section on [Calendars](#).

System Generated Vs Manually Assigned Codes

If System Generated codes / numbers are selected then all the numbers will be automatically generated whenever a new record is created. If Manual Assignment is selected then the number will have to be inputted manually, these codes/ numbers could be as per the numbering convention your Company wants to follow. We strongly recommend that you use “System Generated” setting but if you want to use special codes / numbers which follow your company’s standard you can select “Manually Assigned”

See Also

[Calendars](#)

[Leaves](#)

Calendar Setup

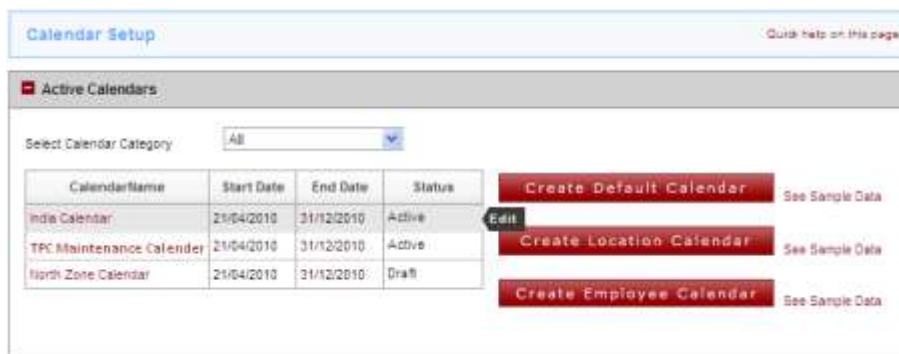
Using Calendar Setup Application Administrator can create and edit Calendars. Calendars are needed before Leave process can be used. There are two ways in which Calendars can be created

1. Copy from Sample Data: use the link [See Sample Data](#) to see the pre-defined Calendars and copy them in your application.
2. Create new: if you don't find a Calendar which meets the requirement of your company you can use the Create <Default/Location/Employee> Calendar button. One or three buttons are visible based on your selection of One or Multiple Calendars in General Setup

At any time you can create only Calendars for the next three years. For more details refer the Section on [Calendars](#).

Active Calendars Table

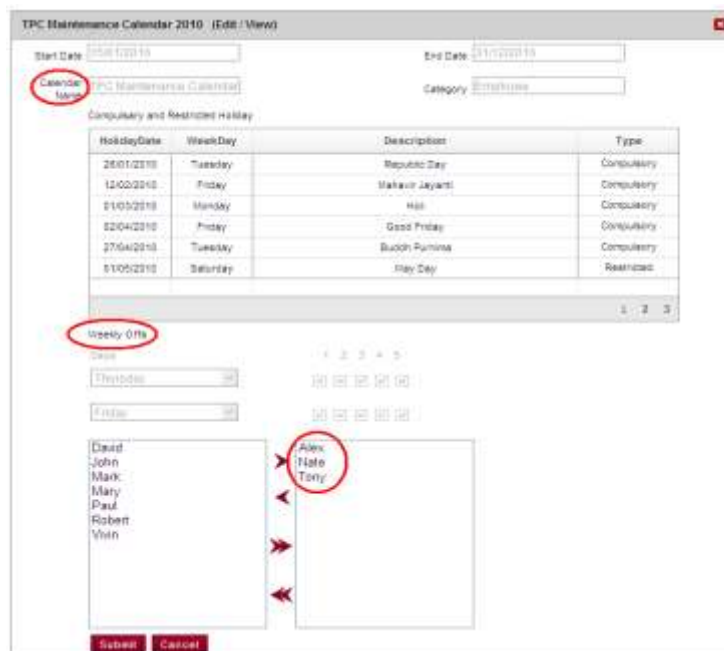
All Calendars created by company including past, draft and active Calendars will be shown in this table. You can view the details of any Calendar by clicking on the hyperlink on the Calendar Name field in this table



CalendarName	Start Date	End Date	Status
India Calendar	21/04/2010	31/12/2010	Active
TPC Maintenance Calendar	21/04/2010	31/12/2010	Active
North Zone Calendar	21/04/2010	31/12/2010	Draft

You can View or Edit any Active Calendar and Edit or Delete a Calendar saved as Draft from this table.

Create <Default / Location / Employee> Calendar



Start Date: 21/04/2010 End Date: 31/12/2010
 Calendar Name: TPC Maintenance Calendar Category: TPC/Maintenance

HolidayDate	WeekDay	Description	Type
26/01/2010	Tuesday	Republic Day	Compulsory
12/02/2010	Friday	Makar Jayanti	Compulsory
01/05/2010	Monday	Holi	Compulsory
22/04/2010	Friday	Good Friday	Compulsory
27/04/2010	Tuesday	Buddh Purnima	Compulsory
01/05/2010	Saturday	May Day	Restricted

Weekly Offs

Day	From	To
Thursday	00:00	00:00
Friday	00:00	00:00

Users: David, John, Mark, Mary, Paul, Robert, Vinit
 Alerts: Nate, Tony

Possible Actions

- Start Date and End Date: These cannot be entered by you but are defined by system
- Description: Give the name you want to use to refer to this Calendar
- Add Compulsory and Restricted Holidays: When creating a new Calendar or editing an existing Calendar you can create new holidays. Use [New](#) hyperlink to create a new holiday. You can also edit or delete holidays by using the mouse-over actions |
- Define Weekly Offs: You can select the days of the weeks on which you want to give a Weekly Off
- You can use button to save the Calendar as Draft or button to submit it. If you submit the Calendar then it becomes Active. You cannot deactivate an Active Calendar

While creating Calendars you need to be aware of the sequence of activities.

Step 1: You have to create a Default Calendar for the current year. If you have started your subscription on 15-Apr-2010 then this Calendar would have a Start Date of 15-Apr-2010 and an End Date of 31-12-2010.

Step 2: If you have multiple Calendars selected you can create a Location Calendar for 2010 but for this you have to have Office Locations saved. Refer to [Setup Office Locations](#) for more details.

Step 3: If you have multiple Calendars you can also now create an Employee Calendar for 2010 but for this you have to have the active Employees in the application.

Step 4: Once you have done this activity for the current year you can proceed to create Calendars for the next year. The Start and End dates of all subsequent Calendars will be 1-Jan and 31-Dec.

Note: Future Calendars are required because Leaves are applied for and approved in future. If you don't have a future Calendar you will not be able to process Leaves for that year.

Edit <Default / Location / Employee> Calendar

You can edit a Draft or an Active Calendar. While there are no constraints in editing a Draft, an Active Calendar can only be edited in future, i.e. you cannot change any holidays or weekly offs in past for an Active Calendar.

See Also

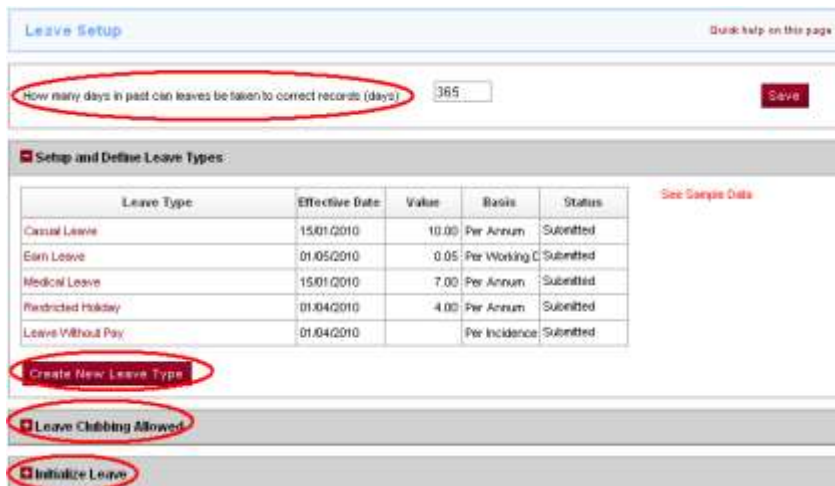
[Calendars](#)

[Leaves](#)

[Taking a Restricted Holiday](#)

Leaves Setup

Leaves is a key module of the application. You can model all the possible types of Leaves you would like to give your Employees using this Setup. See [Leaves](#) section to gain a complete understanding of the Leave functionality before you attempt this setup.



Leave Setup Quick help on this page

How many days in past can leaves be taken to correct records (days) Save

Setup and Define Leave Types

Leave Type	Effective Date	Value	Basis	Status
Casual Leave	15/01/2010	10.00	Per Annum	Submitted
Earn Leave	01/05/2010	0.05	Per Working C	Submitted
Medical Leave	15/01/2010	7.00	Per Annum	Submitted
Restricted Holiday	01/04/2010	4.00	Per Annum	Submitted
Leave Without Pay	01/04/2010		Per Incidence	Submitted

[See Sample Data](#)

Create New Leave Type

Leave Clubbing Allowed

Initialize Leave

Possible Actions

- Define how much of time period is open for taking leaves in past
- Create and manage Leave Types
- Define if leaves can be clubbed together or not
- Initialize leaves

A description of each of these actions is given below.

Sequence of activities to be followed for Leave Setup

Step 1: Create a Leave Type

Step 2: Submit the Leave Type and initialize the leave for all eligible Employees

Step 3: Go to Leave Module and check. The Leave Types which you have submitted and initialized should be visible on Leave Home page for the eligible Employees

Period for past entry of Leave Requests

Using this setting the Application Administrator would be able to control the time-period during which Employees can create leaves with a past date. This functionality is given to allow Employees to create leaves for cases where they have to go on a leave without prior approval in the application and at the same time maintains a discipline of entering the leaves as soon as possible.

Setup and Leave Definition

A set of pre-defined Leave types are provided – these can be accessed and copied through [See Sample Data](#) link on the Leave Setup page. Application Administrator can also create new Leave types through Create New Leave Type button.

Please refer to the Section below on [Leave Fields](#) to understand the purpose of each field.

Leave Initialization

All existing Employees who are added to the application would have a leave balance which would be based on their work and leave history in the company. Through Leave Initialization the Application Administrator is able to update these leaves into the application.

If the HR department decides to add a new Leave Type (due to policy changes) and also wants to assign a non-zero value of this leave to Employees it can be done using this section.

If a new Employee joins the company his record is updated in the application with zero leave balance on completion of his on-boarding activities.

Select an option

How do you want to initialize leave values for all eligible employees?

Save this leave type and initialize with zero value

Save this leave type but don't initialize

When the Leave Type is submitted for the first time a dialogue box will come. If this is a new Leave Type and all eligible employees are to be initialized with a zero leave then you should select the first option “Save this leave type and initialize with zero value”.

If this is an existing Leave and employees have a Leave Balance which needs to be updated in the system then you should select the second option “Save this leave type and initialize with zero value”. If you select the second option you would have to go to Leave Initialization section on Leaves Setup.

Initialize Leave

Initialize Leave by: Employee Name -Select-

Pending Employees

Get Employees

Employee Code	Employee Name	Leave Type	Date of Initialization	Value
TPC1	David	Sick Leave	15/01/2010	5 Save Cancel
TPC2	John	Sick Leave	15/01/2010	
TPC3	Alex	Sick Leave	15/01/2010	
TPC6	Nate	Sick Leave	10/05/2010	
TPC7	Paul	Sick Leave	15/01/2010	
TPC8	Tony	Sick Leave	15/02/2010	

Possible Actions

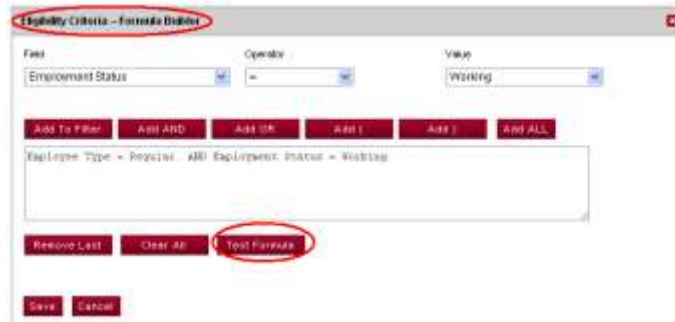
- Initialize Leave by Employee Name: use this option if you know the Employee name for which you have to initialize the leave
- Initialize Leave for Pending Employees: use this to access all the Employees for which Leave Initialization is to be done
- Enter initialization value: use mouse-over Edit to enter the value for each Employee

Note: Even if you don't initialize, the leave is available and Employees can take the leave. Also remember that once you initialize a leave for an Employee with a value you cannot change that. If an Employee joins in the middle of

the year, his joining date is taken as the basis of calculating his leave accrual and all leaves are initialized with a zero value for him.

Eligibility Criteria Formula Builder

The Eligibility Criteria is created and modified using a formula builder. See the section on [Eligibility Criteria](#) to gain a better understanding.



Possible Actions

- Create or Edit a Eligibility Criteria through Formula Builder
- Test the validity of the Formula

Creating a Formula

Step 1: You will see a default formula All in Eligibility Criteria. Click on **Create Eligibility Criteria** button

Step 2: You will see the Eligibility Criteria – Formula Builder. Select the Field, Operator and Value from drop down to make a expression. For example select Field = “Gender Type”, Operator = “=”, Value = “Female”

Step 3: Click on **Add to Filter** button. This button adds the expression made in Step 2 to the Formula and in this case also removes “All” from the box

Step 4: If you want to add another expression you can click on **Add OR** or **Add AND** and then proceed to create an expression. Follow Step 2 and 3 to add another expression

Step 5: If the expression is complex and you need brackets you can use **Add (** or **Add)** to the formula
If you want to clear all the expressions click on **Clear All** button, if you want to remove the last added expression use **Remove Last**

Note: Write down the formula on paper with brackets and logical expression and then use the Formula builder.

Testing a Formula

Once you have made the formula you should test it for both syntax and logic. Click on **Test Formula** button. There are three possible outcomes.

1. **Test Successful but there are no employees which meet the criteria.** This means that the formula you have made is correct but none of the current set of active employees you have meet this criteria.
2. **Test Successful and there are employees as per the list.** The list of employees who meet the criteria are shown. This tells you if your formula is working as per your expectations or not.
3. **Test Failed.** This means that the formula you have made is logically and syntactically wrong. You should go and change the formula.

If the formula you have made is working fine you can close the box and proceed to Save or Submit the Leave.
After any change is done in the eligibility criteria or if a new eligibility criterion is created you are advised to run a Test to see if the formula has been built correctly.

Request Initiation and Approval Process Settings

There are multiple stages in a Leave Process. The identification of which role will be responsible for which stage is done here.

- Request Initiator: The one who creates the Leave Request
- Approver: Who approves the Leave request
- Exception Approver: Additional approver who approves the leave if the Leave Request is exceeding the available days and the employee leave balance is going in negative

There are four roles which can be mapped to Initiation, Approval and Exceptional Approval activities. These roles are

- Self: User himself
- Manager: Manager of the User
- HR Manager: The HR Manager of the company
- CEO: The CEO of the company

There is a hierarchy to these roles, i.e. Self < Manager < HR Manager < CEO.

In each of these stages more than one role can be selected. This would give the flexibility of Leave Request initiation and approval to multiple people.

If no Exception Approver is selected the User will not be able to submit a Leave Request unless he has sufficient leave balance.

If no Approver is selected then any Leave Request which is submitted will get automatically approved.

If more than one role is selected as Approver the process will go from the left role to the right role and will go to all the selected Approvers one by one.

Approver cannot be of a lower level of hierarchy than the lowest level Initiator and Exceptional Approver cannot be of a lower level of hierarchy than lowest level Approver.

Leave Fields

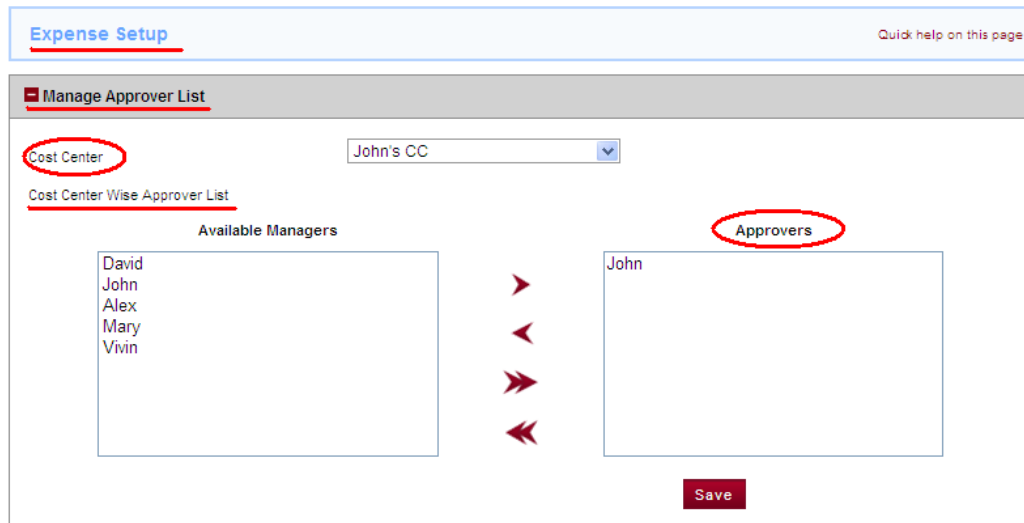
A brief explanation of each field in Leave Type is given below. For more detailed understanding of these fields and how a Leave works go to the section [Leave Definitions](#).

Field	Input	Explanation
Effective Date	Compulsory	This is the date from which the Leave Type is available to all the users who are eligible for this leave type
Close Date	Optional	This is the date on which the leave will become inactive and unavailable
Leave Type	Compulsory	Short description of leave
Leave Description	Compulsory	Long description of leave
Leave Basis	Compulsory	This is the basis of on which leave is given to the Employee. It defines the period or instance on which leave is given
Leave Value	Compulsory	This is the numerical value of the leave. Combined with Leave Basis this tells the system what is the total leave available. If Leave Value = 10 and Leave Basis = Per annum then the system will give the User 10 leave per annum
Category	Compulsory	Leaves can be of four categories and each is defines in a unique way as to how the Leave Type will work
Accrual Method	Compulsory	This defines the point of time when leave is credited to the Employees Leave account. There are four methods of accrual <ul style="list-style-type: none"> - Per Incidence - Beginning of Year / Month - End of Year / Month - Pro rata
Carried Forward	Optional	If this is selected then leave remaining at the end of year is carried forward to the next year
CF Max Limit	Optional	This specifies the maximum limit to which leaves can be carried forward. If there are accrued leaves beyond this limit the amount above the max limit would lapse

Active	Optional	This checkbox is used to activate and deactivate a Leave Type. Refer to Section of Activating Leaves for more details
Holiday Counted	Optional	If holidays fall during a leave they will be counted as a leave if this checkbox is checked. If this box is unchecked then any holiday falling in the request period will not be counted
Half Day Allowed	Optional	If this box is checked then the leave can be taken as a half day leave also else not.
Eligibility Criteria	Compulsory	Eligibility Criteria is used to define the set of Employees who are eligible for the leaves.
Request Initiator	Compulsory	The role which can create a Leave Request
Approver	Optional	The role which can approve a Leave Request
Exception Approver	Optional	The role of User who will approve Exception Leave Request

See Also
[Leaves](#)

Expenses Setup



Expense Setup Quick help on this page

Manage Approver List

Cost Center: John's CC

Cost Center Wise Approver List

Available Managers	Approvers
David	John
John	
Alex	
Mary	
Vivin	

Save

Possible Actions

- Manage Approvers for each Cost Center. You can select a Cost Center and assign or remove Approvers from it

See [Expense](#) section to gain an understanding of the Expense functionality.

See the [Cost Center](#) section to gain an understanding of Cost Centers.

Manage Approver List

Application Administrator through this section can assign Approvers to a Cost Center. Only those Users who have the Manager role in their profile will be available for assignment.

Un-assigning any Approver is only possible if the User (who is being unassigned) is not selected as an Approver in any active Expense Claim.

See Also

[Expenses](#)

[Cost Center](#)

Asset Setup

Asset Department Setup

Assets to be owned by individual Departments Yes No

Assets can be transferred across Departments Yes No Save

Assets Category

See Sample Data

Category	Display Order	
Desk Top	1	Edit
Laptop	2	
Add New		

Possible Actions

- Setup the process of Asset ownership by Department and transferability across Departments
- Create and edit Asset Categories
- Manage the display order

Refer to the Section on [Assets](#) to understand the Asset module.

Asset Department Setup

If you want Company Assets to be controlled at Department level then you should select “Assets to be owned by individual Departments” as Yes. Once you make this selection then you have the option of also defining whether Assets assigned to a Department be transferred to Employees of other Department or not.

Create / Edit Asset Category

You can add new Asset Categories by clicking Add New Category button or he can copy pre-defined Asset Categories through [See Sample Data](#) link on the page. You can also edit existing Asset Categories by using the Edit mouse-over command.

Display Order

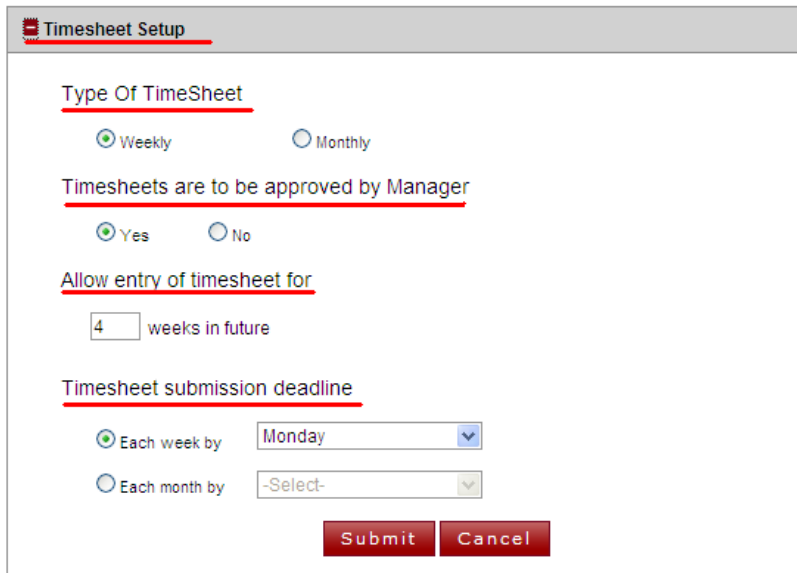
Display Order governs the order in which these records will appear in a drop-down when accessed by a User.

You cannot delete an Asset Category once it has been created.

See Also

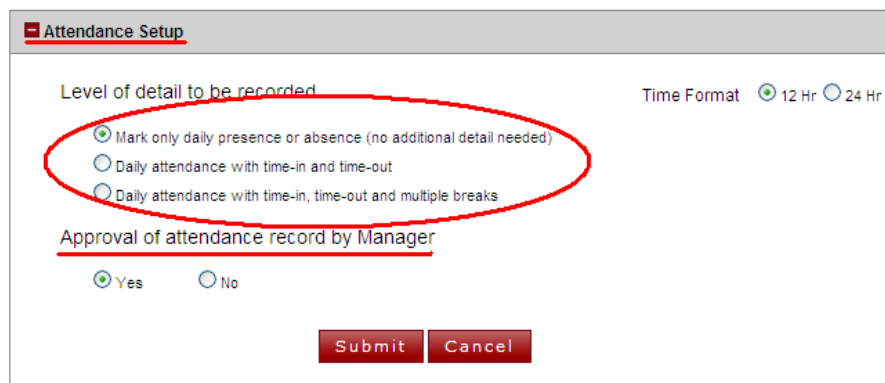
[Assets](#)

Attendance and Timesheet Setup



In this section the setup relevant to Application and Timesheet module is managed.

Attendance Setup



Level of detail of attendance – there are three options through which the option of how much detail needs to be captured when tracking attendance is decided.

1. Only attendance is marked no time is recorded
2. Timestamp of when the employee comes to office and when he leaves the office is recorded
3. Timestamp of when the employee goes on breaks is also recorded

The information has to be entered by employees by clicking on the punch in button so select the option that is desired and feasible for your company.

Approval of attendance – If you want all the attendance records to be approved by the Manager then select Yes else select No.

Enable auto time-out – if this feature is selected as yes then the employees get automatically timed out at the end of their shift. This timeout will only work if they have clocked in and are using option 2 or 3 from above.

Timesheet Setup

Timesheets to be approved by Manager – selecting this as yes will send all timesheets for approval to the Manager.
Allow entry of timesheet for xx weeks in future – using this setup the company can give the employees the flexibility of entering timesheet for future weeks.

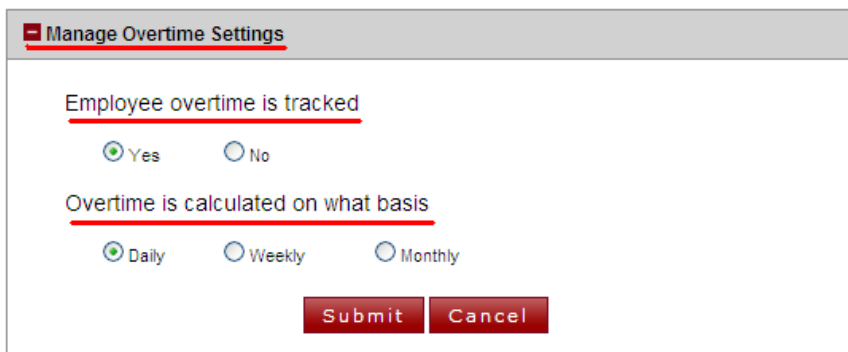
Allow entry for timesheet in future – if future timesheets are not allowed then a value of 0 can be entered here. Maximum value allowed is 52 if weekly timesheets are being used or 12 if monthly timesheets are being used.

Timesheet submission deadline – for weekly timesheets there are two options of defining timesheet submission deadlines

1. Weekly submission on a particular day – for example, company can setup that timesheets are to be submitted by the Friday of each week. If timesheet is not submitted in time then the status becomes as Pending and both employee and his manager can get notifications.
2. Monthly submission – using this setup the company can give its employees the flexibility of submitting timesheets for all the weeks together before the end of the month. Current week which is active during this deadline is also considered due for submission.

For monthly timesheets only the monthly submission option is available.

Manage Overtime Settings



Employee overtime is tracked – Selecting yes here will enable the Managers to see reports on overtime or under-time done by employees.

Overtime calculation basis – Overtime can be calculated based on daily, weekly or monthly aggregation rules. The example below illustrates the three options.

Example

Suppose the company has a five day Monday to Friday week and the standard shift times and actual times recorded by an employee are given in the table below.

	Standard	Mon	Tue	Wed	Thur	Fri
In-Time	09:30	9:45	10:00	09:00	09:35	08:00
Out-Time	18:30	18:00	19:00	15:00	18:45	18:00
Breaks	1:00	1:10	0:30	1:20	1:00	0:45
Total hours	8:00	7:05	8:30	4:40	8:10	9:15
Daily Overtime		-0:55	0:30	-3:20	0:10	1:15
Weekly Overtime	-2:20					

Weekly overtime is calculated by summing all the overtime and undertime over a week.
 Similarly monthly overtime is calculated by summing all the overtime and undertime over a month.

See Also

[Attendance and Timesheet](#)

[Shift Master Data](#)

[Project and Charge Code](#)

HR Master Data

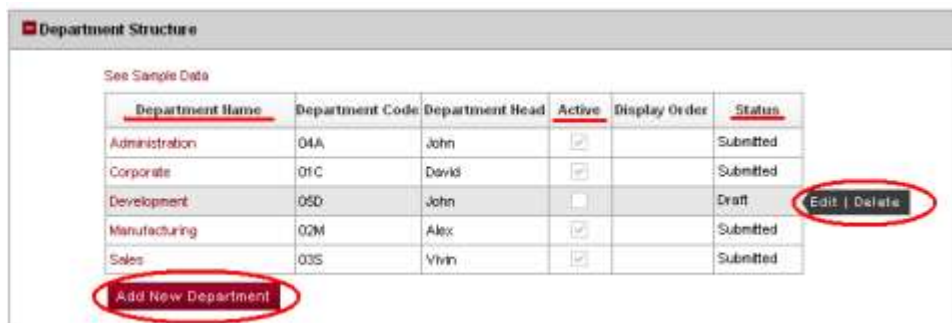
Through this section Application Administrator creates and maintains Master Data. Master Data is needed before the Users can start using the application.

Department Master Data

Departments are used to map the Company's departments. There is complete flexibility in creating and adding as many Departments as are needed. Each Department has a Department Head, for a better understanding of Department Head role see section [Roles in HR](#).

All Employees belong to one and only one Department. It is not compulsory to assign an Employee to a Department but it is highly recommended. Employees are assigned to Departments in [On-boarding](#) section. Change of Department is handled through [Department Transfer](#).

Department Structure



The screenshot shows a web interface titled "Department Structure". It contains a table with the following data:

Department Name	Department Code	Department Head	Active	Display Order	Status
Administration	01A	John	<input checked="" type="checkbox"/>		Submitted
Corporate	01C	David	<input checked="" type="checkbox"/>		Submitted
Development	05D	John	<input type="checkbox"/>		Draft
Manufacturing	02M	Alex	<input checked="" type="checkbox"/>		Submitted
Sales	03S	Vivian	<input checked="" type="checkbox"/>		Submitted

Below the table is a button labeled "Add New Department". To the right of the "Development" row, there is a button labeled "Edit | Delete".

Possible Actions

- Add new Department
- Edit and Manage existing Departments
- Activate and Deactivate Departments
- Manage the display order

Add / Edit Departments

Application Administrator can add new Departments by clicking [Add New Department](#) button. Pre-defined Departments can be accessed and copied through [See Sample Data](#) link on this page.

Display Order

Display Order governs the order in which these records will appear in a drop-down when accessed by a User.

You cannot delete a Department once it has been created.

See Also

[On Boarding](#)

Levels Master Data

Levels are used to map the hierarchy of Organizational levels. Each company has a unique seniority structure and the same can be created in HR application.



<u>Level Name</u>	<u>Seniority Rank</u>	<u>Active</u>
CEO	1	<input type="checkbox"/>
General Manager	2	<input type="checkbox"/> ▲ ▼ Edit
Manager	3	<input type="checkbox"/>
Executive	4	<input type="checkbox"/>
<input type="button" value="Add New"/>		

Possible Actions

- Add and Edit Seniority Levels
- Delete saved drafts
- Activate and Deactivate Levels
- Manage the display order

Add / Edit Levels

You can create Levels and assign them Seniority Rank. A Seniority Rank is indicative of the hierarchy of the Level. Whenever a new Level is created by clicking button or by using pre-defined Levels through [See Sample Data](#) link it gets added to the bottom of the table. It can be moved up or down using the arrow keys which comes as mouse-over commands, moving it up or down will change its Seniority Rank.

Activate and Deactivate

When a record is Deactivated it is not deleted from the database but is only removed from viewing. This allows the Administrator the flexibility of removing a record from User's view but retaining it in the database. Only when the record is again Activated it would become visible in drop-downs or forms.

Display Order

Display Order governs the order in which these records will appear in a drop-down when accessed by a User.

See Also

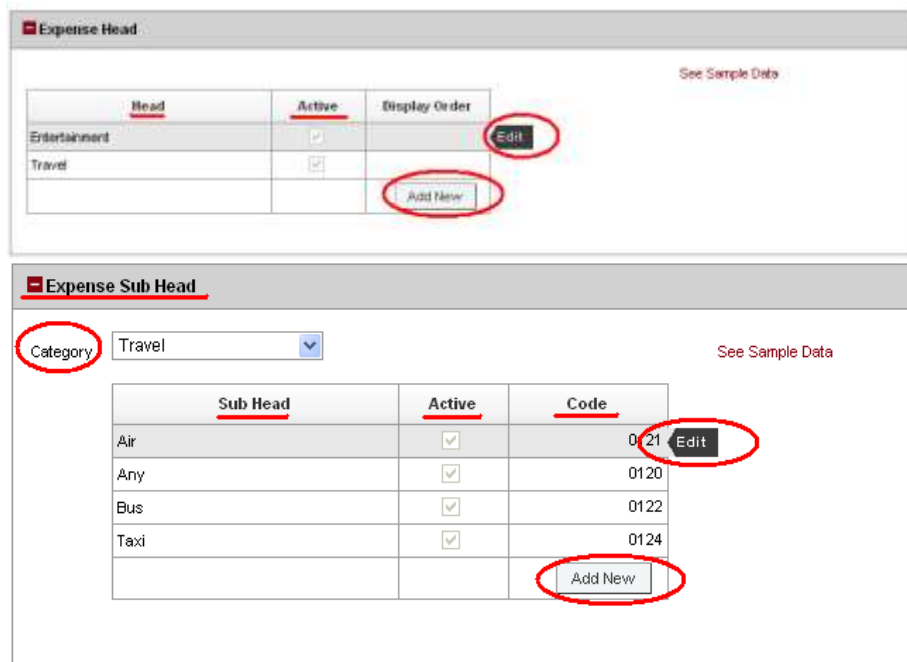
[On Boarding](#)

Expense Master Data

In this section you can define the Expense Heads and Sub Heads. These are used in creation of Cost Centers and Expense Claims to identify the nature of expenditure. Refer to the Section on [Expense Heads and Sub Heads](#) for more details.

Expense Heads and Sub Heads

You have complete flexibility in deciding Expense Heads and Sub Heads which are suitable for the company. The application provides a default Expense Sub Head “Any”. Whenever an Expense Head is created or copied from Sample Data this Sub Head “Any” is also created. “Any” is used to capture miscellaneous expenses in a Head or can be used as a default if you don’t want to create Sub Heads.



Expense Head

Head	Active	Display Order
Entertainment	<input checked="" type="checkbox"/>	
Travel	<input checked="" type="checkbox"/>	

Expense Sub Head

Category: Travel

Sub Head	Active	Code
Air	<input checked="" type="checkbox"/>	0121
Any	<input checked="" type="checkbox"/>	0120
Bus	<input checked="" type="checkbox"/>	0122
Taxi	<input checked="" type="checkbox"/>	0124

Possible Actions

- Add and Edit Expense Heads and Sub Heads
- Activate and Deactivate Heads and Sub Heads
- Delete saved drafts
- Manage the display order

Add / Edit Heads and Sub Heads

You can create Heads by clicking [Add New Head](#) button or by using pre-defined Heads through [See Sample Data](#) link. The Heads have to be then assigned Sub Heads, this is done by selecting the head which has been created in the drop down in the Expense Sub Head section. Whenever we select a head in the drop down we can see the Sample Sub Heads for it through [See Sample Data](#) link (only if this Head was copied from Sample Data).

You can see a Sub Head Any which gets added by default to the Head, this cannot be edited or deleted. You can also see a Code associated with the Sub Head, this can be used by your Accounts team to track and monitor expenses across Heads or across Departments.

Activate and Deactivate

When a record is Deactivated it is not deleted from the database but is only removed from viewing. This allows the Administrator the flexibility of removing a record from User's view but retaining it in the database. Only when the record is again Activated it would become visible in drop-downs or forms.

Display Order

Display Order governs the order in which these records will appear in a drop-down when accessed by a User.

You cannot delete a Head or Sub Head if it is being used in any Cost Center.

See Also

[Expenses](#)

[Cost Center](#)

Office Master Data

Offices are physical locations where the Company has presence. Each Employee is mapped to an Office and other important attributes like City, State, Country and Type of Office are also captured here.

The application allows mapping of standard office types like

- Branch Office
- Head Office
- Sales Office
- Regional Office
- Factory
- Warehouse
- Retail Showroom
- Development Center



Name	Address	Office Type	Active	Status
Delhi HO	Delhi	Head Office	Yes	Submitted
Bangalore Plant	Bangalore	Factory	Yes	Submitted
Mumbai RO	Mumbai	Sales Office	Yes	Submitted
Kolkata RO	Kolkata	Sales Office	Yes	Submitted

Buttons: Add New Office, Edit

Possible Actions

- Add and Edit Offices through button and mouse-over command
- Delete saved drafts
- Activate and Deactivate Offices

Field	Input	Explanation
Office Name	Compulsory	Name of the office by which it will be referred
Office Type	Compulsory	There are pre-defined types of offices available for selection, you can select the appropriate office type from this list
Address	Optional	Office address
Country	Compulsory	Country where the office is situated
State	Optional	State where the office is situated
City	Compulsory	City where the office is situated
Pin Code	Optional	Zip code / Pin code of the office location
Phone number	Optional	Phone number of the office
Display Order	Optional	Display order of the office in drop downs
Active	Optional	Only when this check box is selected the office location will become Activated

See Also

[On Boarding](#)

Shift Master Data

In this section shifts can be defined and assigned to employees. This feature is only available if Attendance and Timesheet module is subscribed to.

Creating and Modifying Shifts

Create and Modify Shift Timings

Shift Name	Start Time	End Time	Status
Default	09:30	17:00	Active
Day Shift	07:30	17:00	Active

[Edit](#) | [Deactivate](#)

[Add New Shift](#)

Shift Name

Start Time End Time

Breaks

Breaks	Start Time	End Time
Dinner	21:00	22:00
tea	00:00	00:15
Add New		

[Save As Draft](#)
[Submit](#)
[Cancel](#)

Possible Actions

- Add new shift through [Add New Shift](#) button
- Delete or edit a shift through [Delete](#) [Edit](#) mouse-over command

A default system defined shift is always available – you can only change its start and end times but cannot delete it. This shift is available to be assigned but is not assigned to the Employees by default – refer to [Employee Detail Management](#) section to understand how HR Manager assigns the shift.

To add a new shift, specify the shift start and end times and optionally you can also specify the break times. Once a shift is submitted and users are assigned to it, shift cannot be deleted unless the user assignment is removed.

Managing Shift Assignments

Manage Shift Assignments

Employee Name	Current Shift		Future Shift	
	Shift Name	From Period	Shift Name	From Period
David	Day Shift	10/08/2010	-Select-	
John	Day Shift	10/08/2010	-Select-	
Alex	Night Shift	10/08/2010	-Select-	
Nate	Day Shift	13/08/2010	-Select-	
Paul	Day Shift	01/08/2010	-Select-	
Tony	Day Shift	11/08/2010	Day Shift	29/10/2011

1 2

Possible Actions

- Select the shift you want to assign to an employee from the drop down
- Enter the date from which the shift assignment has to change in From Period

In this section you can see the current shift assignment for all employees. You can change the shift from a future time period provided no timesheet has been approved for this time period. You can also change a past time period provided no attendance or timesheet has been submitted or approved in the system. At a time only one future shift assignment can be maintained.

See Also

- [Attendance and Timesheet](#)
- [Attendance and Timesheet Setup](#)
- [Project Code and Charge Code](#)

Project Code and Charge Code Master Data

Manage Charge Codes

Through this section you can manage the Charge codes which are to be added to Project codes. Charge codes are common for the company and can be repeated across Project codes.

Quick help on this page

Project Code Master Setup

Manage Charge Codes

Charge Code	Description	Type	Status
CC01	Training	Billed	Active
CC02	Development	Billed	Inactive
CC03	Presentations	Unbilled	Active
			<input type="button" value="Add New"/>

Possible Actions

- Add new Charge Code through button
- Delete or edit a Charge code through mouse-over command
- Deactivate a Charge code through mouse-over command

Note: If a Charge code is deactivated it would not be available in drop down. Once a Charge code is activated it cannot be deleted and its Type also cannot be changed.

Manage Project Codes

Through this section you can manage the Project codes which are to be used to clock time in timesheets.

Manage Projects

Project Code	Description	Start Date	End Date	Status
PC01	Internal Training Sessions	12-08-2010	31-10-2010	Active

Add New Project

Project Code: Project Manager:

Start Date: End Date:

Description:

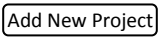


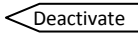
Assign Charge Code

Charge Code	Select
CC01	<input type="checkbox"/>
CC02	<input checked="" type="checkbox"/>
CC03	<input type="checkbox"/>

Assign Employees

<p>Employee List</p> <ul style="list-style-type: none"> David John Alex Rita Paul Tony Mark Mary Vivan 	<ul style="list-style-type: none"> ➤ ➤ ➤ ➤ ➤ ➤ ➤ ➤ ➤ ➤ 	<p>Assigned List</p> <ul style="list-style-type: none"> Paul Tony Alex Mark
---	--	---

Possible Actions

- Add new Project through  button
- Delete or edit a Project through   mouse-over command
- Deactivate a Project code through  mouse-over command
- Assign Charge codes using the check box
- Assign or de-assign employees from the overall list to this specific Project code

Field	Input	Explanation
Project Code	Compulsory	Project code has to be given
Project Manager	Optional	Select the name of the Project Manager for the project
Description	Optional	Project description
Start Date	Compulsory	Date from which time booking is allowed – this has to be same as the week start day
End Date	Compulsory	Date till which time booking is allowed

Note: Like Charge code if a Project code is deactivated it would not be available in drop down but if it is deleted then it will be removed from all references. If an employee has already submitted timesheets for future weeks then he cannot be de-assigned from the Project code for those weeks but can be de-assigned from the weeks after that.

See Also

[Attendance and Timesheet](#)

[Attendance and Timesheet Setup](#)

[Shift Master Data](#)

Calendars

Calendars are used to define the working days, weekly offs and holidays in the application. Gain an understanding of how Calendars are used in the application.

Calendar Definition

Calendars are used to map the holidays for a company. Each Calendar has a Start date of 1-Jan and an end date of 31-Dec except the Calendar for the first year which has a start date of your company's subscription start date. At any point of time you can have only one active Default calendar for a year. Calendars can be made for three years at a time.

Types of Holidays

1. **Weekly off:** these are the days on which the office is closed on a weekly basis. There could be various possible types of weekly offs for example – Sundays, and alternate Saturdays, Sundays and 2nd and 4th Saturday, Fridays. All types of Weekly off scenarios can be captured in the Calendar.
2. **Compulsory holiday:** These are holidays which are to be applicable to all the Users and are automatically accounted for.
3. **Restricted holiday:** Is a set of holidays which are optional and Users can selected a set of holidays from a larger set. For example – there might be 10 restricted holidays and out of which the Employees will have an option of selecting 5 per year. These holidays have to be claimed by Employees using the [Leaves module](#).

The remaining days are treated as working days.

Assigning Calendars to Office Locations / Employees

If your Company has multiple locations or even in one location you follow different Calendars for different teams you can use the functionality of multiple Calendars (available only to Paid users) to model and use different Calendars.

There are three levels at which Calendars can be made and assigned.

1. **Default:** this is applied to all Locations and Employees by default
2. **Location:** this is applied to all Employees within a Location by default
3. **Employee:** this is only applied to specific Employees

The working is illustrated below with an example.

Example

Scenario

Company Name: ABC Corporation

Number of office locations: Five. One Head Office, One Factory and Three Sales Office.

Weekly off:

- Head Office and Sales Offices: Saturday and Sunday.
- Factory: Only Sundays

Compulsory Holidays – 10 holidays which are common across all locations and for all employees.

Restricted Holidays - There are different religious groups and the company would like to give an option to Employees to decide 5 holidays from a list of 15 optional holidays.

In the factory there more than 50 employees and there are three Maintenance Engineers who has to come on Sunday but get an off on Monday, Tuesday and Wednesday respectively.

Setup

The following Calendars need to be made

1. Default Calendar : This is modeled with the following data
 - a. Weekly Off only Sunday
 - b. 10 Compulsory Holidays
 - c. 15 Restricted Holiday
2. Location Calendar : This is inherited from the Default Calendar but an additional Weekly Off of Saturday is added
3. Employee Calendar1 : This is inherited from Default Calendar but the Weekly off is changed from Sunday to Monday
4. Employee Calendar2 : This is inherited from Default Calendar but the Weekly off is changed from Sunday to Tuesday
5. Employee Calendar3 : This is inherited from Default Calendar but the Weekly off is changed from Sunday to Wednesday

These Calendars are then assigned in the following manner.

Calendar Name	Location	Employees
Default Calendar	Factory	All (except Maintenance team)
Location Calendar	Head Office and Sales Office	All Employees
Employee Calendar1	Factory	Maintenance 1
Employee Calendar2	Factory	Maintenance 2
Employee Calendar3	Factory	Maintenance 3

Working with Restricted Holidays

Restricted holidays can be handled in two ways.

1. As shown in the example above each Employee can be given a list of holidays and he can decide which Restricted holidays he wants to take. In this case the Employee will have to apply for a leave on the day he wants to take the Restricted holiday with the leave type as “Restricted Holiday”. The Manager will approve this leave and this leave gets recorded in the system as a Restricted holiday. The system allows him to take only 5 leaves in the year if we consider the above example.
2. After consultation with the Employees the HR Manager can decided Restricted Holidays for different Office Locations or Employee Groups. Suppose he decides to create location based calendars then he can select the appropriate Restricted holidays and convert them into Compulsory holidays and save them as a Location Calendar. This calendar can then be applied to any number of locations. In effect then these Calendars don’t have any Restricted holidays but are common only for a Office. In this option the Employees don’t have to create any leave but they also don’t have any flexibility as the holidays for their location are pre-decided.

Modifying Active Calendars

Any Calendar once activated cannot be modified.

Pre Defined Calendars

The application comes with pre-defined Holiday Calendars for Countries and different Religions with a Weekly Off of Sunday and suggested Compulsory and Restricted Holidays. These calendars can be copied and suitably modified by Application Administrator.

See Also

[HR General Setup](#)

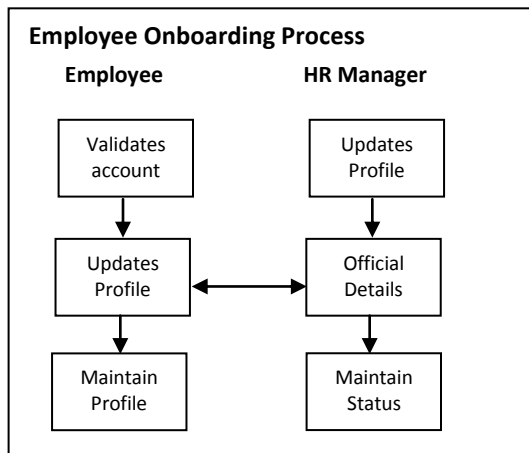
[Calendar Setup](#)

[Leaves](#)

HR Information

HR Information module provides easy access to all the HR records of the Employee and the relevant information at the Company or Department level.

Process Overview



Definitions

Employee Type

Employees can be of two types – Regular and Sub Contractor. Regular employees are directly on company’s payroll and Sub contractor while working full time for the company are not on company’s payroll.

Employment Status

All employees whether Regular or Sub Contractor, can have the following Employment status

- On Probation
- Working
- On Long Leave
- Serving Notice Period
- Resigned

These statuses are maintained through the Official Details section by the HR Manager.

My Profile

Menu Path: HR > HR Info > My Profile

Accessible to: User and HR Manager

As a User you can view your details in this section. Some of these details are inherited from [User Profile](#) section but most of the other details are captured and created here.

Documents which are required to be stored along with the employee records can also be uploaded.

As a HR Manager you can update all the details of an employee if this is selected in Setup. When you are updating

Sections available in this page are

- Personal Details
- Additional Details
- Official Details
- Family Details
- Education Details
- Work Experience
- Identity Documents
- Documents

Personal Details

All employees can fill their Personal Details and upload their photograph in this section.



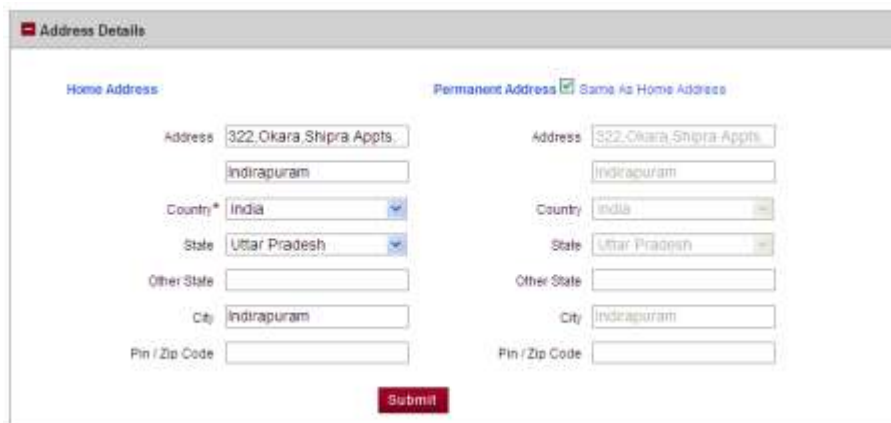
Personal Details Form

Field	Input	Explanation
First Name	Compulsory	Employee's first name
Last Name	Compulsory	Employee's last name
Sex	Optional	Male or Female
Email ID	Compulsory	This is usually employee's corporate email and is stored during the registration process.

Possible Actions

- through mouse over command
- the details

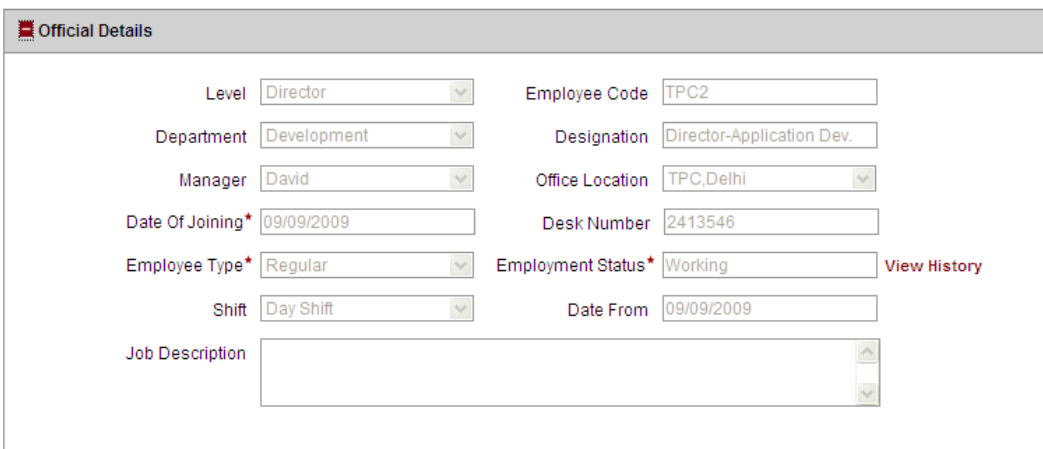
Address Details



Employees can fill up their Home and Permanent address in this section.

Official Details

Details in this section are filled by HR Manager. Employees can only view this section and cannot write or edit anything in here.



Official Details Form


Field	Input	Explanation
Level	View	Select from drop down (see section Level Master Data for details)
Employee Code	View	Can be system generated or manually entered as per company's policy
Department	View	Select from drop down(see section Department Master Data for details)
Designation	View	This is the official designation of the Employee
Manager	View	Select from drop down
Office Location	View	Select from drop down(see section Office Master Data for details)
Date of Joining	View	Employee's date of joining
Desk Phone	View	Employees desk phone number
Employee Type	View	Can be either Regular or Sub contractor
Shift	View	Shift to which the employee is assigned
Nature of Employment	View	Can be either On Probation or Regular
On Probation Till	View	Is applicable only if Employee is On Probation. This gives the date till which the Employee is on probation
Job Description	View	Employee's official job description

Possible Actions

- Employees can only view this table and cannot make any changes details are updated by HR Manager

Additional Details

Employees can fill additional details through this form like Personal Details, Permanent Address & Passport Details.



The screenshot shows a form titled "Additional Details" with a "Personal" section. The fields are as follows:


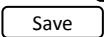
- Date Of Birth*: 08/09/1969
- Phone (Res): 4567321
- Phone (Office): 2401916
- Marital Status: Single
- Emergency Contact Name: Annie
- Blood Group: B+
- Alternate Email ID: (empty)
- Extension: 126
- Emergency Contact Number: 9878654321

A red "Submit" button is located at the bottom center of the form.

Additional Details Form

Field	Input	Explanation
Date of Birth	Compulsory	Your date of birth
Blood Group	Optional	Your blood group
Phone(Res)	Optional	Your sex(Male/Female)
Alternate Email ID	Optional	Your alternate Email ID
Phone(Office)	Optional	Your mobile number
Extension	Optional	Your office extension number
Marital Status	Optional	Your marital status
Marriage Anniversary	Optional	Your marriage anniversary date
Emergency Contact Name	Optional	Name of person to contact during an emergency
Emergency Contact Number	Optional	Contact number to reach during an emergency
Permanent Address	Optional	Click on check box if permanent address is same as Employee's Residence Address otherwise fill in the details
Passport Number	Optional	Your Passport number
Date Of Issue	Optional	Date on which passport was issued
Date Of Expiry	Optional	Date on which Passport is getting expired
Place Of Issue	Optional	City where passport has been issued
Country Of Issue	Optional	Country where passport has been issued

Possible Actions

- Edit  through mouse over command
-  the details

Family Details

Employees can fill their Family Details in this section with Name, Relation, DOB, & Dependents. Employees will be given the option of adding, editing & deleting the details.



The screenshot shows a form titled "Family Details" with a table of family members. The table has columns for Name, Relation, DOB, and Dependent. There are two entries: Annie (Wife, DOB 10/02/1972, Dependent checked) and Rachel (Daughter, DOB 03/08/2000, Dependent checked). A "New" button is located at the bottom right of the table. A red "Submit" button is at the bottom center of the form.

Family Details Form

Field	Input	Explanation
-------	-------	-------------

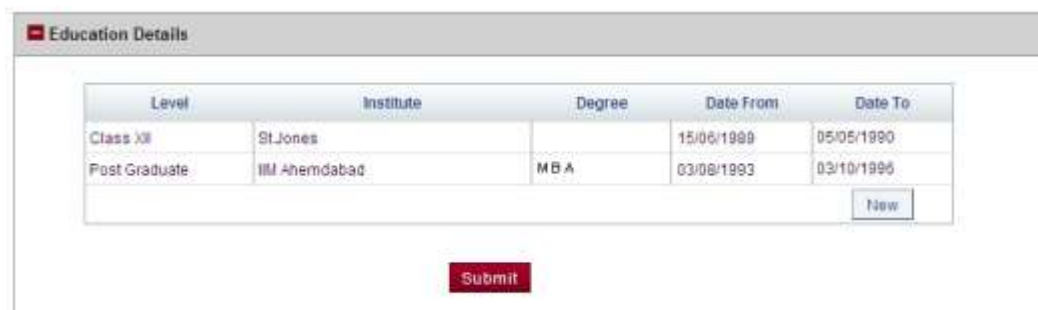
Name	Optional	Name of the person selected in relation
Relation	Optional	Select the relation from Drop down
Date of Birth	Optional	Enter the date of birth of the personal selected in relation
Dependent	Optional	Click on check box if there are any dependant

Possible Actions

- and through mouse over command
- new details
- details

Educational Details

In this Section employees can fill their educational details. Employees will be given the option of adding, editing & deleting the details.



Education Details Form

Field	Input	Explanation
Level	Optional	Select level from the drop down (Primary, Class XII, Under Graduate, Post Graduate, Doctorate)
Institute	Optional	Name of Employee's institute
Degree	Optional	Name of Employee's Degree
Date from	Optional	Start date of the level selected
Date To	Optional	End date of the level selected

Possible Actions

- and through mouse over command
- new details
- the details

Work Experience

Employees can fill the details of their work experience in this section and will be given the option of adding, editing & deleting the details.

Work Experience

Company Name	Last Designation	Date From	Date To	Comments
PCL Communications	Sr.Mgr	09/02/2000	08/03/2002	
Soft Solutions	Director	10/03/2002		Currently
				<input type="button" value="New"/>

Work Experience Form

Field	Input	Explanation
Company Name	Optional	Enter your company name
Last Designation	Optional	Enter the last designation held at this company
Date from	Optional	Start date of the job
Date To	Optional	End date of the job
Comments	Optional	Any comments about the job

Possible Actions

- and through mouse over command
- new details
- details

Identity Documents

Employees can fill the details of their identity documents like, Voter ID, Driving license, Passport etc. in this section and will be given the option of adding, editing & deleting the details.

Identity Documents

Type	DocNo	Issue Date	Valid Till	Issue Authority	Place of Issue	Comments
Passport		13/06/2000	02/06/2020	Govt of India	Delhi	
VoterID	XSD1051124	01/11/2009		Election Com.of I	Ghaziabad	
						<input type="button" value="New"/>

Field	Input	Explanation
Type	Optional	Select level from the drop down(ID Card, Passport, Voter ID, License)
Doc No	Optional	Enter document number
Issue Date	Optional	Start date of the Document
Valid Till	Optional	End date of the Document
Issue Authority	Optional	Name of the issuing authority
Place Of Issue	Optional	Name of the place where document has been issued
Comments	Optional	Any comments about the document

Possible Actions

- and through mouse over command
- new details
- details

Documents

Documents

File Name	Description
Expense claim form.doc	Expense claim form
Resume.doc	Resume.doc
<input type="button" value="Upload"/>	

Employees can upload or remove their documents like - Resume, Employment Letter etc, through this section.

See Also

[Team Details](#)

[Company Section](#)

[HR Manager Area](#)

Team Details

Menu Path: HR > HR Info>Team Details

Accessible to: User and HR Manager

This Section will have all the details of the different teams in the company. User can view the names of all the Employees under the respective managers. Managers would be able to see all Employees and their details under them.



Manager Name	Employee Name	Employee Code	Designation	Location	Phone	Level	Reportees
David	John	TPC2	Manager HR, Adm	Delhi HO		3	Yes
David	Alex	TPC3	GM - Manufactur	Bangalore Plant		2	Yes
David	Vivin	TPC8	Sales Head	Mumbai RO		2	Yes

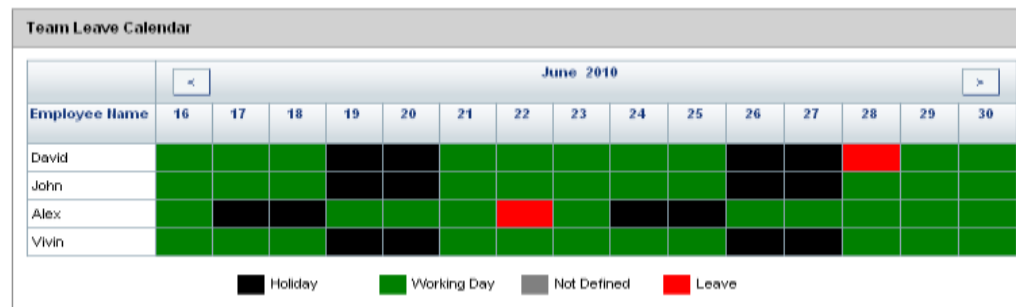
My Team Table

Field	Input	Explanation
Manager Name	View	Name of the manager
Employee Name	View	Name of employee
Employee Code	View	Code of the employee
Designation	View	Designation of the employee
Location	View	Office location of the employee
Phone	View	Official phone number of the employee
Level	View	Level of the employee in the organization
Reportees	View	Are there more employee reporting to this employee. Can be Yes or No.

Possible Actions

- On clicking “Employee Name” User would get navigated to My Profile page with only view functionality.
- On clicking Reportees “Yes” hyperlink Manager can see details of Employees working under their own Employees who are also Managers.

This section will only have view functionality with all data open for viewing.



Employee Name	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
David	Green	Green	Green	Black	Black	Green	Green	Green	Green	Green	Black	Black	Red	Green	Green
John	Green	Green	Green	Green	Green	Green	Red	Green	Green	Green	Green	Green	Green	Green	Green
Alex	Green	Green	Green	Green	Green	Green	Red	Green	Green	Green	Green	Green	Green	Green	Green
Vivin	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green

Holiday
 Working Day
 Not Defined
 Leave

You can also view your team’s leave Calendar with working days of your team members in green, holidays in black and leaves marked in red color

See Also

[My Profile](#)

[Company Section](#)

[HR Manager Area](#)

Company Section

Menu Path: HR > HR Info>Company Section

Accessible to: User and HR Manager

Employees List

This section will be visible to all Employees with Department Name, Employee Name, Employee Code, Designation, Location and Phone.


Employee List for The Premier Company					
Department Name	Employee Name	Employee Code	Designation	Location	Phone
Administration	Paul	TPC7	Accounts Clerk	Delhi HO	2401918
Administration	John	TPC2	Manager HR, Admin & A	Delhi HO	2401917
Corporate	David	TPC1	CEO	Delhi HO	2401916
Manufacturing	Alex	TPC3	GM - Manufacturing	Bangalore Plant	2401914
Manufacturing	Nate	TPC5	Maintenance Manager	Bangalore Plant	2401914
Manufacturing	Tony	TPC8	Plant In-charge	Bangalore Plant	

Employee List Table

Field	Input	Explanation
Department Name	Optional	Department of the Employee
Employee Name	Optional	Name of Employees
Employee Code	Optional	Code of the Employee
Designation	Optional	Designation of the employee
Location	Optional	Location of the office of the employee
Phone	Optional	Official Phone Number of the employee

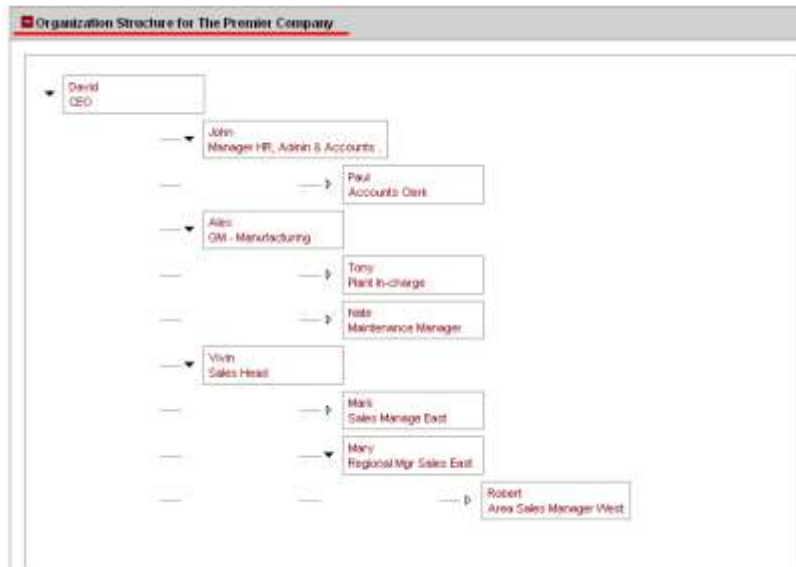
Possible Actions

- On clicking Employee Name summary details of the Employee will open up as shown below will open up

Employee Details: David	
	Department - Corporate Email Id - david@premier.com Office Location - Delhi HO Reports to -
	Designation - CEO Phone (Mob) - 0983456722 Phone (Off) - 111 Manager of - See List

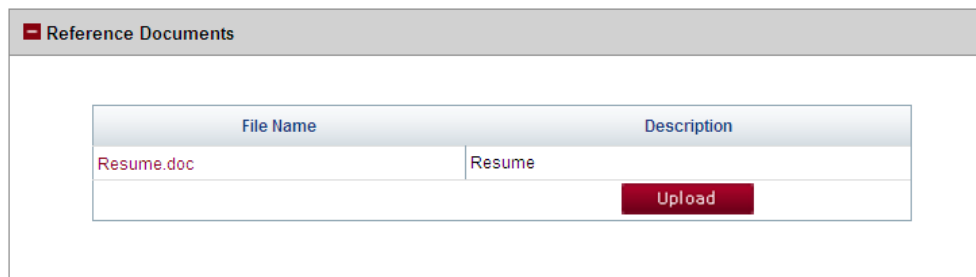
Organization Structure

In this section you can view the organizational Structure of the Company. You can click on any + sign to expand the node and view the people reporting to that Manager. Those employees who are not reporting to anyone will be visible at the bottom. Clicking on the hyperlinked name will open up the [Employee Details](#) view shown above.



Reference Documents

This section can be viewed by all users and they can use it only to download and view the documents uploaded by the HR Manager. Only HR Manager can also use this section to upload and manage documents.



File Name	Description
Resume.doc	Resume

Manage Reference Documents Table

Field	Input	Explanation
File Name	Compulsory	Name of the file uploaded
Description	Compulsory	Type of document

Possible Actions for Employees

- Use Download to download the document
- If you click on the hyperlink you will get an option of opening or saving the file

Possible Actions for HR Manager

- Use mouse-over command to change Category or Document Name
- Use to delete any existing documents
- Use button to upload new documents

See Also

[My Profile](#)

[Team Details](#)

[HR Manager Area](#)

HR Manager Area

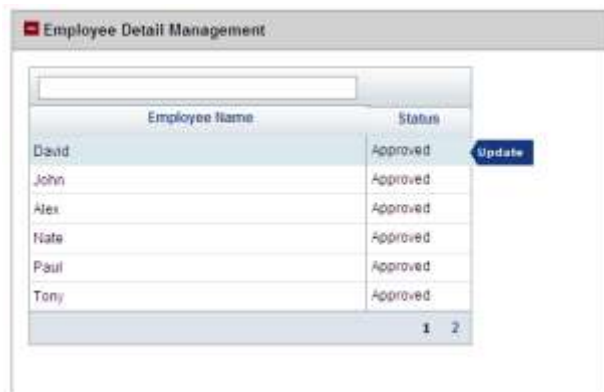
Menu Path: HR > HR Info>HR Manager Area

Accessible to: HR Manager

Employee Detail Management

Whenever a new employee validates his account and becomes a user of EazeHR, his profile reaches HR Manager for updation with a status of “Submitted”. If the company has selected the option of HR Manager updating all the details in Setup then HR Manager would be able to see and update all the details of the Employee but if the company has selected the option of HR Manager only updating Official details then he can only see and update the Official details.

Till the HR Manager updates the Official details and submits them the employee record is not available for other parts of the application.



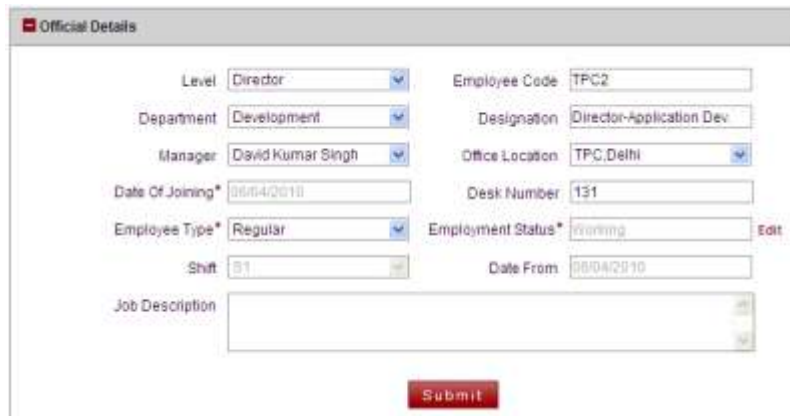
Employee Detail Management

Field	Input	Explanation
Employee Name	System	Name of the pending employee for on boarding
Status	System	Status can be Submitted or Approved. Submitted would mean that the details are to be filled up and Approved would mean that the details has been filled up and Employee is on-boarded.

Possible Actions

- Click on the Status hyperlink to go to the Official Details form.

Official Details



Office Details Form

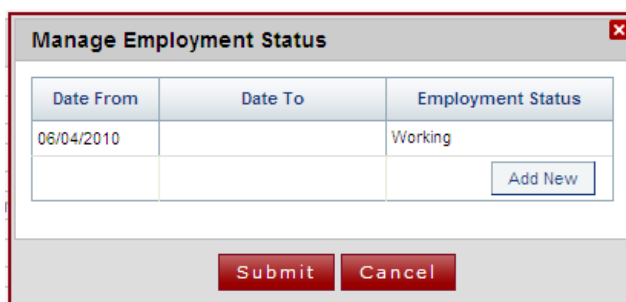
Field	Input	Explanation
Level	Optional	Select from drop down (see section Level Master Data for details)
Employee Code	System	Can be system generated or manually entered as per company's policy
Department	Optional	Select from drop down (see section Department Master Data for details)
Designation	Optional	This is the official designation of the Employee
Manager	Optional	Select from drop down
Office Location	Optional	Select from drop down (see section Office Master Data for details)
Date of Joining	Compulsory	Employee's date of joining
Desk Phone	Optional	Employees desk phone number
Employee Type	Compulsory	Can be either Regular or Sub Contractor
On Probation Till	Optional	Is applicable only if Employee is On Probation. This gives the date till which the Employee is on probation
Shift	Compulsory	The shift for employee has to be defined, without assigning the shift attendance cannot be marked and timesheet cannot be submitted. Once the shift has been assigned it can be changed through Setup.
Job Description	Optional	Employee's official job description

Possible Actions

- and

Managing Employment Status

Employment Status of an employee is maintained through the **Edit** command in Official Details section. When an employee goes on long leave or resigns the status should be updated from this section. Access of a resigned employee will be terminated after his last working day.


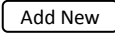


Date From	Date To	Employment Status
06/04/2010		Working

Manage Employment Status of Employee Table

Field	Input	Explanation
From Date	Compulsory	Whenever a new employment status is created the date from which this status becomes applicable is entered here. This date cannot be entered or changed in past.
To Date	Compulsory	This is compulsory for all except the current employment status row.
Employment Status	Compulsory	Select the appropriate employment status using the drop down

Possible Actions

- Use  mouse-over command to edit the Employment Status of any employee
- Use  button to add a new row

Note: You cannot leave a gap in the employment status dates. The To Date of previous status has to coincide with the From Date of the next status.

See Also

[My Profile](#)

[Team Details](#)

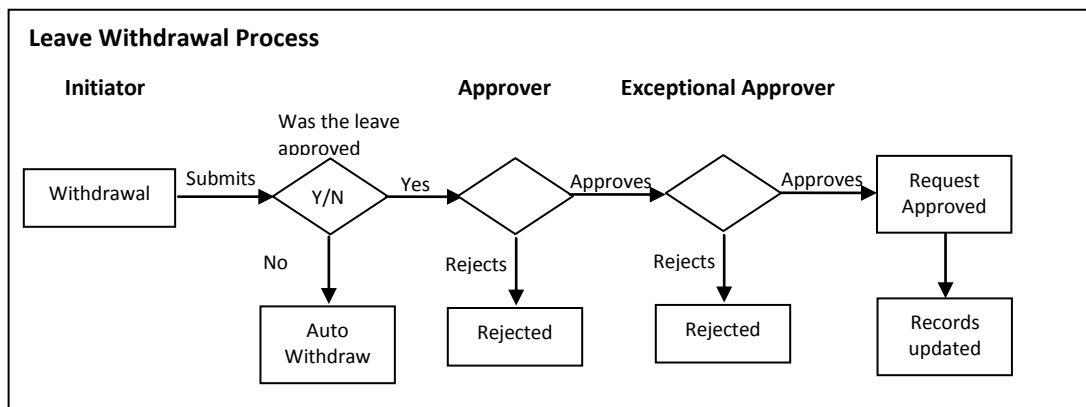
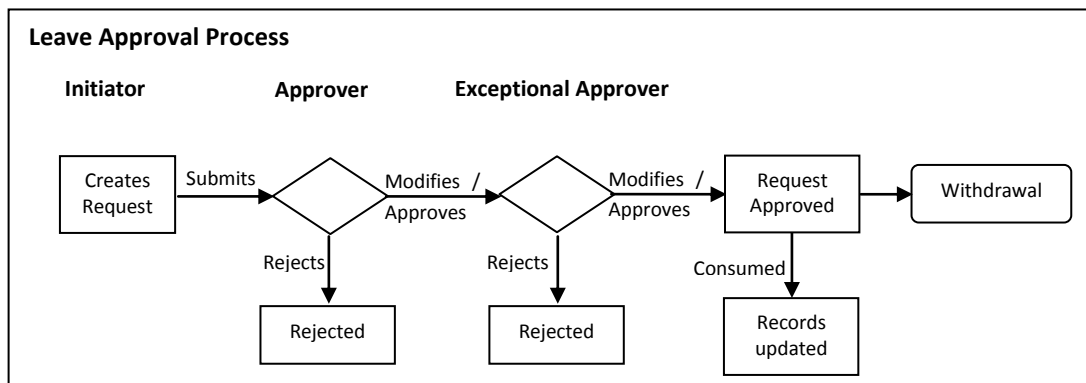
[Company Section](#)

Leaves

Leave Module is designed to allow Employees to create, modify or withdraw a leave request. It also allows the Manager or HR Manager to approve the request or modify the request. Leave encashment, viewing current Leave balance and complete Leave history are other aspects of this module.

Leaves in the application are defined with multiple parameters, a detailed description of each of the field and what it means is given in the section on [Leave Fields](#). In this section the way Leaves are designed is explained and then how Leave module works is detailed out.

Process Overview



Definitions

Leave Types

Leaves are of different Leave Types. For example Sick Leave, Medical Leave, Casual Leave are all different Leave Types. The system comes with some pre-defined Leave Types and Administrator can create any number of new Leave Types which the Company needs.

Leave Category

There are four leave categories used in the application. These are

1. LWP (Leave Without Pay): This is used to create a leave which when approved will lead to a deduction of employee's salary.

2. **Restricted Holiday:** Company may decide to give employees flexibility to choose their own holidays from a larger set of days. This is typically done to manage different regional and religious holidays while keeping the overall number of holidays constant. Restricted Holidays leave category is used to create Leave Types which are taken as Restricted Holidays.
3. **Compensatory Off:** In case employees are working extra hours or shifts or coming to office on holidays then the employees can claim Compensatory Offs. These have to be approved by their manager. Taking a Compensatory Off does not impact the salary and does not reduce any Leave Balance. Leave Types which are linked to Compensatory Off leave category are used to take Compensatory Offs.
4. **Leaves:** This is the default leave type which is used to handle all the normal leaves which the company might use and these can be created and customized by the Application Administrator while the other three cannot be deleted or modified.

Leave Basis

Leave basis is the time period over which the Leave is given, some of the cases which are modeled in the application are

1. **Per annum:** leave is calculated on an annual basis
2. **Per month:** leave is calculated on a monthly basis
3. **Per incidence:** leave is given on each time it is applied, there is no pre-defined time period. For example, like Maternity leave.
4. **Total working days:** the leave is calculated on the basis of total days the Employee has worked (total days employed – holidays)
5. **Total day employed:** this is the total period of employment and also includes holidays and leaves
6. **Total for Employee:** here the leave is given over an employment period of an Employee, for example Study leave could be specified as 12 months over the whole employment period

Leave Accrual

Leaves are credited to Employee account - in other words accrue to the Employee account - over time. There are different ways in which Leaves can accrue and these are also linked to the Leave Basis

1. **Beginning of Year:** in this method the leaves for the year will get credited in the beginning of the year itself, used if Leave Basis is Per annum
2. **End of Year:** in the method the leaves for the year get credited at the end of year, used if Leave Basis is Per annum
3. **Per Incidence:** here the leaves are credited on approval, i.e. whenever the leave is approved the leaves which are approved get credited to Employees leave account, used when Leave Basis is Per incidence
4. **Pro-rata:** in this method the leaves accrue proportionately over time. See the example below for more details
5. **Beginning of Month:** in this option leaves are credited in the beginning of the month, this is used only for Leave Basis Per month
6. **End of Month:** leaves are credited end of month, used only for Leave Basis Per month

End of Year Treatment of Leaves

Leaves which are remaining at the end of year can have one of three outcomes.

1. **Encashment:** actually Encashment can be done at any time during the year but most companies prefer to do it during the end of year. If a Leave is encashed then the Employee gets money and the Leave Balance is reduced
2. **Carry Forward:** end of year leaves can be carried forward to the next year. The company can decide the limit beyond which the Leaves will get lapsed.
3. **Lapse:** if Encashment or Carry Forward options are not given then the leaves which are remaining at the end of year are reduced to zero. This is called Lapsing of Leaves.

Leave Accrual Example

Leave Type: Casual Leave Leave Category: Leave Leave Basis: Per annum Leave Value: 10
Accrual Method: Pro-rata

Year Opening Leave Balance as on 1-Jan-2010 = 10.5 (half day leaves are allowed)
Today's Date = 30-Apr-2010

Number of days which have gone by in this year = 120

Daily leave eligibility = 10 / 365

Thus leaves eligible over 120 days = $120 \times 10 / 365 = 3.28 = 3.00$ (application rounds off the leaves to the nearest integer for the purpose of leave eligibility calculation)

In this example,

If Leave Accrual method was Beginning of Year then Leaves as on 1-1-2010 would have been = $10.5 + 10 = 20.50 = 21.00$

If Leave Accrual method was End of Year then Leaves as on 1-1-2010 would have been = $10.5 + 0 = 10.50 = 11.00$

Holiday Counted

If a leave is taken and there are some holidays during the leave period. Whether the holidays will be counted as leaves or not will depend upon what is the selection in this field in a Leave Type. All three types of holidays – Restricted, Compulsory and Weekly Off are taken into account as holidays. See the Section on [Calendars](#) for more details on Holiday types.

Half Day Allowed

If a leave has is allowed to be taken for half a day then this option has to be selected in the Leave Type definition.

Eligibility Criteria

There are some Leaves which are not applicable to all Employees. To define the set of Employees who are eligible for a Leave Type the Eligibility Criteria is used. In the application it is modeled as a formula which gives a list of Employees as output. The Application Administrator can create or modify the Eligibility Criteria for any Leave Type.

Disciplinary Leave

Managers have the authority to create a Leave on behalf of the Employees reporting to them. This should be used in the case when an Employee does not report for work and does not submit a Leave Request despite reminders. The Leave Request which is created by the Manager in such a case is marked and tracked as a Disciplinary Leave.

Exception Leave

Some Companies want to have a policy wherein they want to grant leaves to Employee even if he/she does not have sufficient balance. These leave are called Exception Leaves and need to be taken through an extra step of approval.

Actions Possible on an Leave Request

The request can have four possible actions

1. Approved as it is: in this case the original request goes ahead to the next stage
2. Modified and then Approved: the modified request goes ahead to the next stage

3. Rejected: the request is closed with a status Rejected and no further action is possible on it
4. Returned: the request is sent back to the request initiator and he has the option to Resubmit it

Activating and Deactivating Leave Types

Once a Leave Type is activated most of the parameters except description and dates cannot be changed. A Leave Type can be deactivated at any point of time and then activated again. Deactivation will prevent users from requesting and getting leaves of this type but on reactivation the leaves accrual will continue normally. Deactivation temporarily removes the Leave Type from User access but all its definitions are available, the in process requests which refer to this Deactivated Leave Type can be processed as usual.

Leave Withdrawal

A leave request can be withdrawn if the last date of the leave is less than the period of past entry allowed (as per Setup). Requester can withdraw the request by from the Withdrawal tab in Leaves module. If the leave request is approved then the withdrawal request also has to follow a similar approval workflow.

Period for past entry

Leave requests and Leave withdrawal requests can be put into the system within this period for past entry. This is decided during Setup and can be changed anytime. See [Leaves Setup](#) for more information.

Leave Request Status

A leave request can have following status

Draft	Leave request has not been submitted
Submitted	Leave request has been submitted for approval
Approved	Leave request has been approved - since there can be multiple levels of approval this status may be there for more than one step
Rejected	Leave request has been rejected by approver
Request Withdrawn	Leave request has been withdrawn by the initiator
Leave Withdrawn	Leave was approved but subsequently it was withdrawn

Leave Withdrawal Request Status

A leave withdrawal request is used to withdraw an approved leave request. Similar to a leave request this also has an approval workflow and goes through multiple status

Draft	Leave withdrawal request has not been submitted
Submitted	Leave withdrawal request has been submitted for approval
Approved	Leave withdrawal request has been approved - since there can be multiple levels of approval this status may be there for more than one step
Rejected	Leave withdrawal request has been rejected by approver

See Also

[Calendars](#)

[Leaves Setup](#)

Leaves Home

Menu Path: HR > Leaves

Accessible to: User

On the Leave Home page you can

- a) view your leave balance
- b) see any draft requests which you have saved earlier



The screenshot shows a 'Leave Summary' window. It contains two tables. The first table, 'Leave As on (30/06/2010)', has columns for Leave Type, Year Opening, Accrued, Consumed, Lapsed, and Closing Balance. The second table, 'Future Leave As on (30/06/2010)', has columns for Leave Type and Approved. A 'Refresh' button is located at the bottom of the window.

Leave Type	Year Opening	Accrued	Consumed	Lapsed	Closing Balance
Casual Leave	12.00	4.00	8.00	8.00	16.00
Sick Leave	8.00	2.00	8.00	8.00	10.00
Medical Leave	16.00	3.00	8.00	8.00	13.00
Restricted Holiday	8.00	8.00	8.00	8.00	8.00
Leave Without Pay	8.00	8.00	8.00	8.00	8.00

Leave Type	Approved
Casual Leave	8.00
Sick Leave	8.00
Medical Leave	8.00
Restricted Holiday	8.00
Leave Without Pay	8.00

Leave As on .. Table

You can see a summary of all the Leave Types which you are eligible for up to today. You need to click on button to get an updated status.

Field	Explanation
Leave Type	Name of the Leave
Year Opening	This is the opening balance of leaves in your account in the beginning of the year
Accrued	This will tell you how many leaves you have additionally accumulated in this year
Consumed	All leaves which have been taken are updated as consumed
Lapsed	Leaves which have lapsed in this calendar year are shown here
Encashed	If your company allows encashment of leaves then the leaves which have been encashed are shown here
Closing Balance	Final balance as on a particular day based on all other values

Future Leave As on.. Table

This table shows you all the leaves which you have applied for and have got an approval for in future.

Draft Request Table

You can view the Draft Leaves in this table and click on any record to edit that Leave Request.

See Also

[Leave Request](#)

[Leave Approval](#)

[Leave Withdrawal](#)

[Leave History](#)

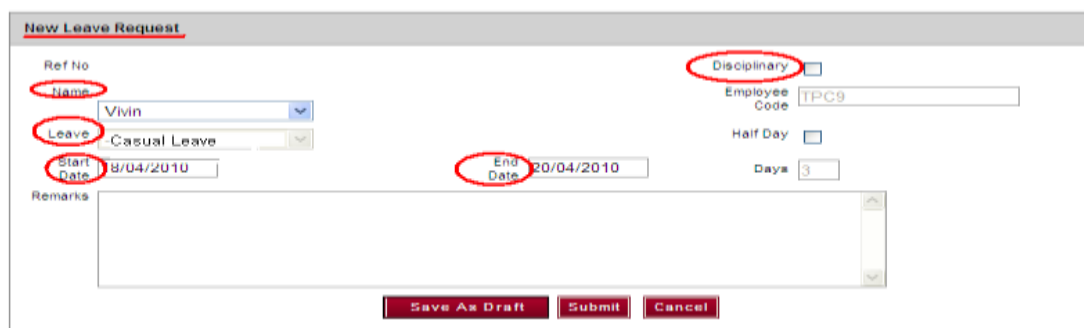
Leave Request

Menu Path: HR > Leaves > Request

Accessible to: As per Setup

Through this process you can create a leave request for yourself (or others as per Setup). You need to fill all required details like name, type of leave, start date of the leave & end date of the leave to complete the request. Based on the configuration selected by Administrator a leave request can be raised by multiple people, various options are

- User creates for himself
- Manager creates for his team
- HR Manager creates for all the employees assigned to him



Leave Request Form

Field	Input	Explanation
Disciplinary	Optional	Manager should select this checkbox to indicate that the Leave Request is being created as a Disciplinary Leave. Refer to Disciplinary Leave for more information
Name	Compulsory	Name of the Employee for which the Leave Request is being created
Employee Code	System	Gets updated automatically based on Employee Name
Leave Type	Compulsory	Select a Leave Type from the drop down
Half Day	Optional	Click on the check box only if you want leave for half day
Start Date	Compulsory	Start date of leave
End Date	Compulsory	End date of leave
Days	System	Calculation showing how many days of leave is this coming to
Remarks	Optional	Any comments which are to be put

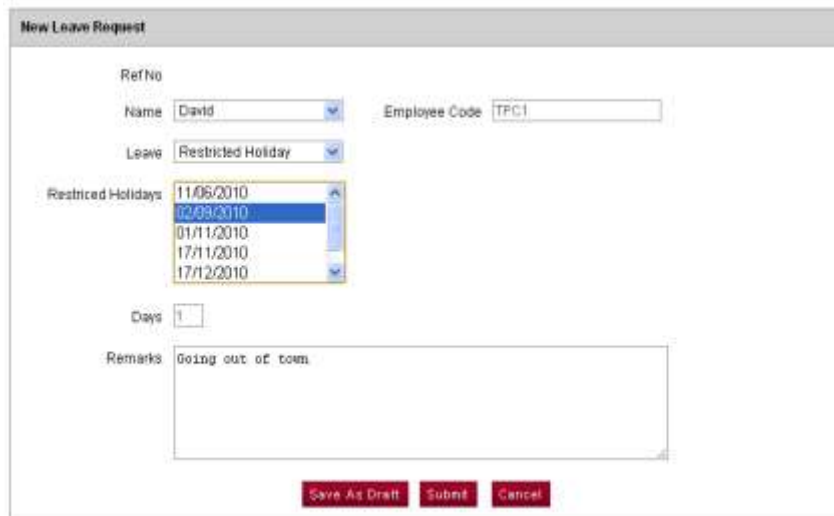
If you are not sure of your entries you can save the request by clicking on **Save as Draft**, with this your request will get saved but not submitted and once you are sure of your entries you can click on **Submit**. On submission the request will go to your Manager for approval.

For each leave type if a leave request is in process or approved leave request exists between requested dates then a new request is not allowed. You can create multiple requests as long as they are of different leave types. If you don't have a pending leave request and are not able to create a new one get in touch with your Application Administrator or drop us an email at support@eazework.com mentioning your company name in subject.

All the leave types which are applicable to you as per your Company's policy are available to you. Once you submit the leave request the system does an immediate check on validity and if the leave request is more than available leaves then the request is submitted as an exception (if allowed by your company). All exception leave requests have a different approval process (as defined by your company).

Taking a Restricted Holiday

If your company has configured Restricted Holidays you can apply for a Restricted Holiday using the Leave module. The total number of Restricted Holidays you are eligible for in a year is given in your Leave Summary table. To apply for a Restricted Holiday you have to apply like a regular leave but instead of giving a start and end date of the leave you have to select the holiday from the list of Restricted Holidays.



New Leave Request

Ref No

Name: David Employee Code: TFC

Leave: Restricted Holiday

Restricted Holidays:

- 11/06/2010
- 02/09/2010
- 01/11/2010
- 17/11/2010
- 17/12/2010

Days: 1

Remarks: Going out of town

Save As Draft Submit Cancel

See Also

[Leave Approval](#)

[Leave Withdrawal](#)

[Leave History](#)

Leave Approval

Menu Path: HR > Leaves > Approval

Accessible to: As per Setup

Leaves are approved by the Approver as defined in the Setup; there can be single or multiple approvers. Options available in Setup to select as approvers are

- Self: in this case the Leave is automatically approved
- Manager: leave request goes to Manager for approval
- HR Manager: leave request is approved by HR Manager of the Employee
- CEO: leave request is approved by CEO

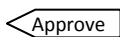



Req ID	Req Type	Name	Leave Type	Req Date	Start Date	End Date	Days	Exp	Status
215	New Leave	Alex	Casual Leave	29/06/2010	05/05/2010	08/05/2010	2.00	Is	Submitted
212	New Leave	John	Medical Leave	28/06/2010	22/04/2010	23/04/2010	2.00	Is	Submitted

Leave Pending for Approval Table

Field	Input	Explanation
Req ID	System	Hyperlinked. Serial number of the leave request
Req Type	System	This can have two values – “New Leave” if the request is for a new leave and “Leave Withdrawal” if the request if for withdrawing an approved leave
Name	System	Name of the Employee for whom the Leave Request is created
Leave Type	System	Type of leave requested(see section Leave Type for more details)
Req Date	System	Date when request was submitted
Start Date	System	Start date of leave
End Date	System	End date of leave
Days	System	Total duration of leave
Exp	System	If Exception Leave then this is Yes
Status	System	Status would be Submitted

Possible Actions

- Approve the Request: You can directly approve the request by clicking on  mouse-over command
- Reject the Request: You can directly reject the request by clicking on  mouse-over command
- Edit the Request: Click on hyperlinked Req ID Modify Leave Form will open up

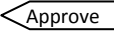

Once the leave request is approved it would go for second stage of approval (if required), after all the approvals are done then the leave request will show status Approved.

Modify Leave Form

Field	Input	Explanation
Name	System	Click on the hyperlink on the Requested ID to view details
Employee Code	System	Date on which request was raised
Leave Type	System	Leave Type of the request
Half Day	System	Name of the Employee for whom the request is placed
Start Date	System	Start date of leave request
End Date	System	End date of leave request
Days	System	Total duration of leave
Exception	System	If Exception Leave then this is Yes
Remark	System	Comments entered by requester
Available Leaves	System	Number of leaves available
Approver	System	Name of Approver
Exceptional Approver	System	Name of Exceptional Approver

Start Date	Compulsory	Start date of leave
End Date	Compulsory	End date of leave
Days	System	Gets updated automatically once start date and end dates are entered
Remark	Optional	Any comment which are to be put

Possible Actions

- Approve the Request: You can directly approve the request by clicking on  mouse-over command
- Reject the Request: You can directly reject the request by clicking on  mouse-over command
- Edit the Request: Approver can only edit the start and end date of the request
- Save as Draft: you can save the request as draft and reopen at a later point

See Also

[Leave Request](#)

[Leave Withdrawal](#)

[Leave History](#)

Leave Withdrawal

Menu Path: HR > Leaves > Withdrawal

Accessible to: As per Setup

Users can withdraw the leave request any time before the [Period for past entry of leave requests](#) gets over. After this period gets over leave would be posted in records and cannot be modified. This period is customizable and would be decided for your company by your Application Administrator.

If the leave request is not approved then you can withdraw the leave request but if the leave request has been approved than you will have to create a new withdrawal request. This withdrawal request will follow a process similar to leave request.

Leave Request Available For Withdrawal								
Request ID	Name	Disciplinary	Leave Type	Req Date	Start Date	End Date	Days	Exp
215	Alex	No	Casual Leave	29/06/2010	05/05/2010	08/05/2010	2.00	No
214	Alex	No	Medical Leave	28/06/2010	13/06/2010	14/06/2010	2.00	No
213	Alex	No	Casual Leave	28/06/2010	26/04/2010	26/04/2010	1.00	No

Leave Request Available for Withdrawal Table

Field	Input	Explanation
Requested ID	System	Hyperlinked. Click on the hyperlink on the Requested ID to view details
Dated	System	Date on which request was raised
Leave Type	System	Leave Type of the request
Name	System	Name of the Employee for whom the request is placed
From	System	Start date of Leave Request
To	System	End date of Leave Request
Days	System	Total duration of Leave
Exception	System	If Exception Leave then this is Yes

Possible Actions

- Withdraw Leave Request: Click on mouse-over command 

Once the Withdrawal Request is approved the status of leave request should change to withdrawn.

See Also

[Leave Request](#)

[Leave Approval](#)

[Leave History](#)

Leave History

Menu Path: HR > Leaves > View History

Accessible to: User

Complete leave history is available for the current year in the sub menu Leave History. Here you can view all leaves which you have taken in past including consumed leaves and also the request which are in process or approved.

Only the current year's leave records are kept in active view. If you want to access leave records of past years please get in touch with your Application Administrator.

Leave History						
Request ID	Leave Type	From	To	Pending With	Days	Status
215	Casual Leave	05/05/2010	08/05/2010	David	2.00	Submitted
214	Medical Leave	13/06/2010	14/06/2010		2.00	Approved
213	Casual Leave	26/04/2010	26/04/2010		1.00	Approved

Leave History Table

Field	Input	Explanation
Requested ID	System	Click on the hyperlink on the Requested ID to view details
Leave Type	System	Leave Type of the request
From	System	Start date of Leave Request
To	System	End date of Leave Request
Days	System	Total duration of Leave
Status	System	Current status of the Request. It could be Submitted, Approved, Rejected, Draft, Consumed, Leave Withdrawn and Req Withdrawn

You will see all your leave requests with their current status including the consumed leaves.

Possible Actions

- View Details: Click on hyperlink to see the details of each request in history

Leave History						
Request ID	Leave Type	From	To	Pending With	Days	Status
215	Casual Leave	05/05/2010	08/05/2010	David	2.00	Submitted
214	Medical Leave	13/06/2010	14/06/2010		2.00	Approved
213	Casual Leave	26/04/2010	26/04/2010		1.00	Approved

Withdrawal History Table

Field	Input	Explanation
Requested ID	System	Click on the hyperlink on the Requested ID to view details
Leave Type	System	Leave Type of the request
From	System	Start date of leave request
To	System	End date of leave request
Days	System	Total duration of leave
Status	System	Current status of the request. It could be Draft, Submitted ,Approved and Rejected

Possible Actions

- View Details: Click on hyperlink to see the details of each request in history

See Also

[Leave Request](#)

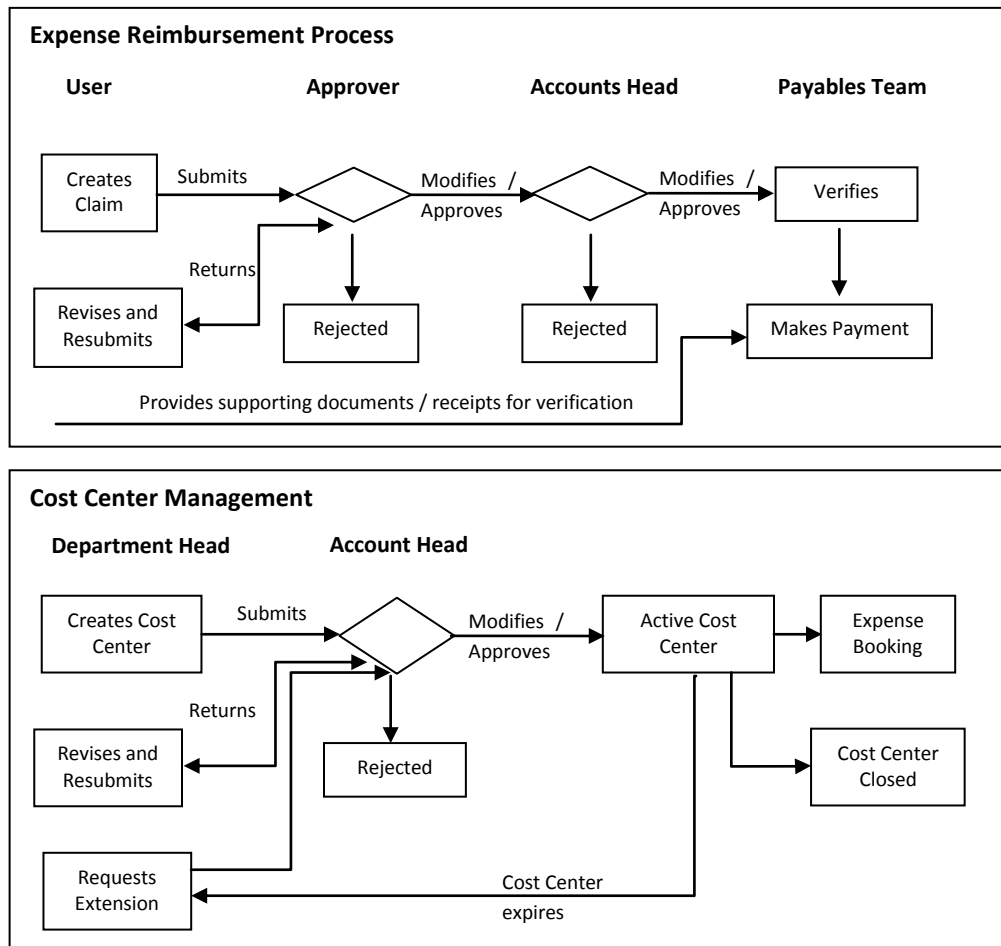
[Leave Approval](#)

[Leave Withdrawal](#)

Expenses

Expense Module is designed to allow Employees to create Expense Claims. It also allows the Department head and Account head to approve the request or modify the request. Cost center Creation, Verification and Payment are other aspects of this module.

Process Overview



Definitions

Expense Heads and Sub Heads

Expense Heads are used to group similar types of Expenses into one group, for example an Expense Head of Travel would have the various Sub Heads like Air, Taxi, Train, Car, 2-Wheeler. You have complete flexibility in deciding Expense Heads and Sub Heads which are suitable for the company.

Types of Expenses

The Expense process can be used to claim different types of expenses by the employees. Expenses they incur as a part of their official work and are reimbursable by the company and expenses which are part of their salary and need to be claimed. In both the cases the process is similar and the expense which is submitted is approved by Manager then by Account Head and finally goes to the Accountant for verification and payment.

Cost Center

A Cost Center is created to define a budget and to divide that budget into appropriate Expense Heads and Sub Heads. In the application Cost Center can be created by a Department Head for his Department or by the Account Head for any Department. The budget allocated to a Cost Center has to be defined at the Sub Head level. For example, if you select a Head – Travel and want to allocate budget to this Head you will have to select the Sub Head to which the budget is to be finally allocated. A default Sub Head “Any” is provided, you can allocate the entire budget to “Any” if you don’t want to create multiple Sub Heads.

Cost Centers have a validity period as defined by the Start Date and End Date and if the End Date is over then the Cost Center is in a “Closed” status.

Cost Center Closing

Cost Center can be closed any time by the Department Head or Account Head. When a Cost Center is closed the pending expense claims are allowed to be processed but no new expense requests can be entered against that Cost Center. A closed Cost Center can be reopened through Cost Center Extension.

Cost Center Extension

Cost Center extension is done due to two reasons –

1. The End Date is over and the Cost Center is “Closed”
2. The budget in the Cost Center is over

In both the cases the Cost Center Extension is request by the Department Head who had created the Cost Center and approved by the Account Head.

Expense Claim Status

An Expense Claim goes through a multi-stage process; it can have the following status

Draft	Expense request has not been submitted
Submitted	Expense request has been submitted for approval
Approved(Mgr)	Expense request has been approved by the Manager
Approved(AH)	Expense request has been approved by the Account Head
Rejected(Mgr)	Expense request has been rejected by Manager
Rejected(AH)	Expense request has been rejected by Account Head
Returned (Mgr)	Expense request has been returned by Manager
Returned(AH)	Expense request has been returned by Account Head
Verified	Expense request has been verified by the Payables team
Paid	Expense request has been paid by the Payables team

Cost Center Status

Draft	Cost Center has not been submitted it is only available with the Department Head
Submitted	Cost Center has been submitted for approval to Account Head
Returned	Cost Center has been returned for making changes by Account Head
Rejected	Cost Center has been rejected by Account Head
Approved	Cost Center is approved and expenses can be submitted against it

Resubmitted
Closed

A Returned Cost Center has been resubmitted to Account Head
Cost Center is no longer active and no expenses can be submitted. But an extension can
be requested to again make the Cost Center Approved

See Also

[Expense Home](#)

[Expense Request](#)

[Expense Approval](#)

[Expense Verification and Payment](#)

[Cost Center](#)

[Cost Center Create / Edit](#)

[Cost Center Extension](#)

[Cost Center Closing](#)

Expenses Home

Menu Path: HR > Expenses

Accessible to: User

You can check the status of your requests in the Expense Statement Summary table in the Expense module home page. You can click on any expense request in this table to view more details or use the actions buttons to process these expense requests.

[Expense Home](#) Quick help on this page

Expense Statement Summary

Voucher No	Date	Description	Approver	Status
218	30/06/2010	Local Tour	Vivin	Submitted
219	30/06/2010	Trip from Kolkata to Delhi	Vivin	Paid

Expense Statement Detail

Vr. No: Date:

Description:

Approver: Status:

SN	Date	Cost Center	Category	Sub Category	Desc	App Amount	PaidAmount
1	09/06/2010	Vivin CC	Travel	Air	Mark request 001	5500.00	5500.00
Total						5500.00	5500.00

Remarks

Payment Details

Mode	Date	Details	Amount
Cash	30/06/2010		5500
Total			5500

Expense Statement Summary Table

Field	Input	Explanation
Voucher No	System	Click on the hyperlink on the Voucher No to view details
Date	System	Date of expense request
Description	System	Description of expense as entered by the requester
Approver	System	Name of the approver with whom the expense is either pending or has been last approved
Status	System	Current status of the request. It could be Submitted, Returned, Rejected, Approved, Verified or Paid

Possible Actions

- View Details: Click on hyperlink to see the details of expense request

See Also

[Expense Request](#)

[Expense Approval](#)

[Expense Verification and Payment](#)

[Cost Center](#)

[Cost Center Create / Edit](#)

[Cost Center Extension](#)

[Cost Center Closing](#)

Expense Request

Menu Path: HR > Expenses > New Expense

Accessible to: User

Through this section you can create an expense claim. You need to fill all required details in the form; you can save the draft or take a printout and submit it to the account with supporting documents.

Before you can create an expense claim you need to know the Approver, Cost Center, Expense Head and Sub Head on which you will claim the expense. If you are in doubt you can find out the approver of the Expense Head which you are submitting by talking to your Manager or HR Manager.



Expense Request Form

Field	Input	Explanation
Voucher No	System	Empty initially but gets automatically filled when Submitted or Saved
Date	System	Today's date
Description	Compulsory	Description of Expense to be entered by the Requester
Approver	Compulsory	Select the name of the Approver who will approve this Expense Request
Ref Vr No	Optional	If this Expense Request has to be linked to any previous request then the Voucher No of the previous request can be entered here
Expense Details		
Date	Compulsory	Enter the Date on which the Expense was incurred. If the expense was incurred over multiple days then check with your HR Manager on the date to be entered
Cost Center	Compulsory	Select the Cost Center to which this expense has to be booked
Head	Compulsory	Select the Head to which this expense has to be booked
Sub Head	Compulsory	Select the Sub Head to which this expense has to be booked
Description	Compulsory	Enter a brief description on the nature of the Expense
Amount	Compulsory	Enter the amount which has to be claimed. No decimals are allowed
Supporting	Optional	Select the check box if you are submitting any supporting documents along with the expense request

Possible Actions

- Create a New Expense Request: through this page you can create and save or create and submit a new expense request

If you are not sure of your entries please click on **Save as Draft**, with this your request will get Saved but not submitted and once you are confirmed that your entries are valid click on **Submit**. On submission the request will go to the Department Head for approval. You can track the status of this request from the Expenses Home page.

Please check with your company HR Manager to understand what type of claims can be submitted. Typically the Expense module is used to claim official expenses and salary reimbursements.

Also check with the HR Manager or your Manager as to how you should submit the supporting documents.

See Also

[Expense Home](#)

[Expense Approval](#)

[Expense Verification and Payment](#)

[Cost Center](#)

[Cost Center Create / Edit](#)

[Cost Center Extension](#)

[Cost Center Closing](#)

Expense Approval

Menu Path: HR > Expenses > Expense Approval

Accessible to: Approvers & Account Head

The Approver is typically the Department Head or a Manager from the Department where the expense is booked.

There are two parts to this page –


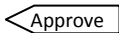


1. Pending Expense Approvals (Role : Approver) – this is visible to all the Approvers
2. Pending Expense Approvals (Role : Account Head) – this is visible to only the Account Head

Expense Request Approval							Quick help on this page
Pending Expense Approvals						Role : Approver	
Vr No.	Date	Name	Description	Claim Amount	App Amount	Status	
44	16/04/2010	John	My first Travel Request	100	100	Submitted	Edit Approve Reject Return

Pending Expense Approvals (Role : Approver) Table

Field	Input	Explanation
Voucher No	System	Hyperlinked. Click on the hyperlink to see the details of the Request
Date	System	Date on which the Expense Request was submitted
Name	System	Name of the Requester
Description	System	Description of Expense as entered by the Requester
Claim Amount	System	Total amount of the Expense Request as claimed by the Requester
App Amount	System	This gives a default value which is same as Claim amount
Status	System	Request can have only two status – Submitted, Resubmitted

Possible Actions

- Edit the Request: Click on hyperlink or the  mouse-over command
- Approve the Request: You can directly approve the request by clicking on  mouse-over command
- Reject the Request: You can directly reject the Request by clicking on  mouse-over command
- Return the Request: You can return the request by clicking on  mouse-over command

If you “Return” the request back you will be asked to input some comments which should tell the User why you are returning the request. The User can then “Resubmit” the request back to you after making the changes

If you “Reject” the request you will be asked to input some comments which should tell the User why you are rejecting the request. The User cannot claim any expense on that request then – he will have to create a new request form.

You can also edit the request and change the amount in the “App Amount” column but you cannot change any other detail like Expense Head or Sub Head or Date. You should be aware of the genuineness of the expense and the eligibility of the Requester to claim it. If in doubt please refer your company HR Manual or talk to the HR Manager.

App Amount is the amount which you have approved and it goes for the next stage of approval to the Account Head.

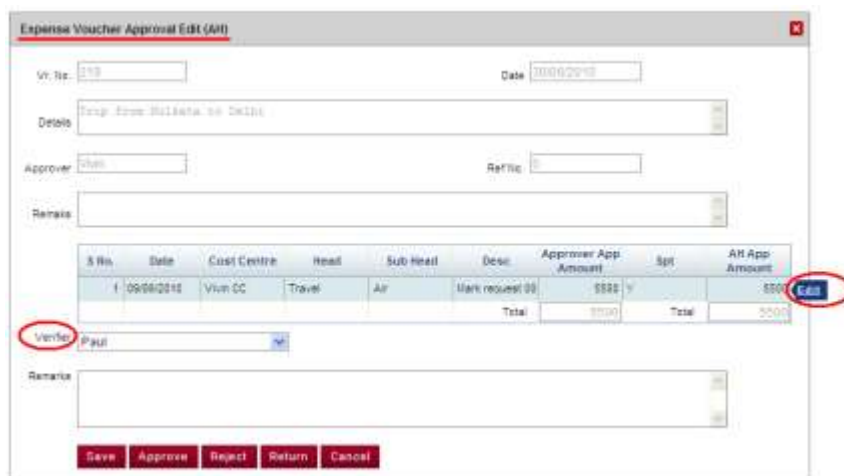
Vr No.	Date	Name	Description	Approver App Amt	AH App Amt	Status	
219	30/05/2010	Mark	Trip from Kolkata to Delhi	5000	5000	Approved(Mgr)	Edit Approve Reject Return

Pending Expense Approvals (Role: Account Head) Table

Field	Input	Explanation
Voucher No	System	Hyperlinked. Click on the hyperlink to see the details of the Request
Date	System	Date on which the Expense Request was submitted
Name	System	Name of the Requester
Description	System	Description of Expense as entered by the Requester
Approver App Amount	System	This is the amount which has been approved by the Approver in the previous step
AH App Amount	System	This gives a default value which is same as Approver Approved amount
Status	System	Request can have only one status – Approved (Approver)

Possible Actions

- Edit the Request: Click on hyperlink or the [Edit](#) mouse-over command
- Approve the Request: You can directly approve the request by clicking on [Approve](#) mouse-over command
- Reject the Request: You can directly reject the request by clicking on [Reject](#) mouse-over command
- Return the Request: You can return the request by clicking on [Return](#) mouse-over command



The form displays the following fields and controls:

- Vr No.:** 219
- Date:** 30/05/2010
- Description:** Trip from Kolkata to Delhi
- Approver:** Mark
- Ref No.:** 0
- Remarks:** (Empty text area)
- Table:**

S No.	Date	Cost Centre	Head	Sub-Head	Desc	Approver App Amount	Spl	AH App Amount
1	05/06/2010	Vivun CC	Travel	Air	Mark request 00	5000	Y	5000
Total						5000	Total	5000
- Verifier:** Paul
- Buttons:** Save, Approve, Reject, Return, Cancel

Possible Actions

- Modify AH Approved Amount: Click on [Edit](#) mouse-over command and change the amount
- Select the Verifier: from the dropdown whom you want to assign the task of Verifying and Paying this Expense Request
- Enter Remarks: Any instructions you want to give can be captured here

On approval by Account Head the Request will go to the Accountant.

See Also

[Expense Home](#)

[Expense Request](#)

[Expense Verification and Payment](#)

[Cost Center](#)

[Cost Center Create / Edit](#)
[Cost Center Extension](#)
[Cost Center Closing](#)

Expense Verification and Payment

Menu Path: HR > Expenses > Expense Verification

Accessible to: Accountant

Accountant role is given to Users who are responsible for Verifying and Approving the Expense Requests.

There are two parts to this page –

1. Expenses Pending for Verification
2. Expenses Pending for Payment

Expenses Pending for Verification					
Voucher NO.	Submission Date	Name	Description	Amount	Status
219	30/06/2010	Mark	Trip from Kolkata to Delhi	5500	Approved(AH) Edit

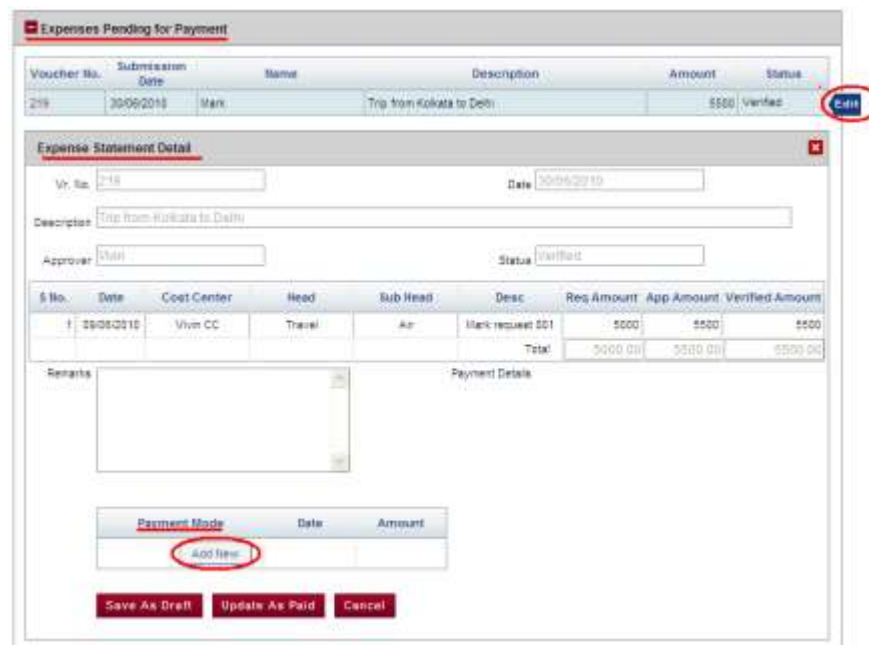
Expenses Pending for Verification Table

Field	Input	Explanation
Voucher No	System	Hyperlinked. Click on the hyperlink to see the details of the Request
Submission Date	System	Date on which the Expense Request was submitted
Name	System	Name of the Requester
Description	System	Description of Expense as entered by the Requester
Amount	System	Amount approved by Account Head which is to be taken up for verification
Status	System	Request can have only one status – Approved (AH)

Possible Actions

- Edit the Request: Click on hyperlink or the [Edit](#) mouse-over command. As a Verifier the only option available is to Edit the request and enter the verified amount.

If you have not received any supporting or you have other reasons to not verify the request you can enter zero as verified amount in each row and Submit. Also enter the remarks as to why you are verifying with zero value.



Expenses Pending for Payment Table

Field	Input	Explanation
Voucher No	System	Hyperlinked. Click on the hyperlink to see the details of the Request
Submission Date	System	Date on which the Expense Request was submitted
Name	System	Name of the Requester
Description	System	Description of Expense as entered by the Requester
Amount	System	Amount verified in the previous step and which is to be now paid
Status	System	Request can have only one status – Verified

Possible Actions

- Edit the Request: Click on hyperlink or the mouse-over command. Once the request opens in Edit mode you can enter the payment mode and payment details
- Update as Paid: You can make partial payments to this request and only when the complete amount is paid you can click on button, this will mark the status of the request as Paid

As an Accountant you cannot Reject or Return the request.

See Also

[Expense Home](#)

[Expense Request](#)

[Expense Approval](#)

[Cost Center](#)

[Cost Center Create / Edit](#)

[Cost Center Extension](#)

[Cost Center Closing](#)

Cost Center

Cost Centers are used to allocate budgets and control expenses against this budget. Using Cost Centers Accounts and Department Heads are able to monitor and control the expense requests.

Menu Path: HR > Expenses > Cost center

Accessible to: Department head and Account Head

Cost Center is an accounting concept used to create a head where budget can be allocated and costs can be booked. Only Department Heads are authorized to create the Cost Center which is then approved by the Account Head.

Cost Center Page as seen by Department Head

Cost Center Status

From this table you as can review and act upon the Cost Centers for your Department

Cost Center Status								Role : Department Head
Code	Description	Request Date	Start Date	End Date	Approved Amount	Available Amount	Status	
000001	John's CC	29/06/2010	01/02/2010	31/12/2010	60000	60000	Approved	Close Extension
000003	John CC-1	29/06/2010	01/02/2010	31/12/2010	0	0	Rejected	

Possible Actions

- View a Cost Center: clicking on the hyperlink on the Code will open the Cost Center in a view or edit mode depending upon its status
- Create a New Cost Center: click on the **New Cost Center** button
- Delete a saved Cost Center: you would be able to delete a Cost Center saved as draft
- Edit a Cost Center saved as Draft : you would be able to edit an existing Cost Center if it is saved as draft
- Close an existing Cost Center: by clicking on **Close** mouse-over command you can [Close](#) and existing Cost Center which is in approved status
- Request Extension for a Closed Cost Center: By clicking on **Extension** mouse-over command you can request [Extension](#) for approved or Closed Cost Centers
- Resubmit a Returned Cost Center: if your Cost Center request was returned by the Account Head you can Resubmit the Cost Center by clicking on **Resubmit** mouse-over command.

Cost Center Status Table

Field	Input	Explanation
Code	System	Code of the Cost Center
Description	System	Description of Cost Center as entered by the Department Head
Requested Date	System	Date on which the Cost Center was submitted
Start Date	System	Start Date of Cost Center
End Date	System	End Date of Cost Center
Approved Amount	System	Budget approved for the Cost Center in total
Available Amount	System	Amount still available for expenditure in the Cost Center
Status	System	There can be many different status and explanation of each status is given below




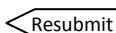
The various fields which are visible on view of a Cost Center are also explained in the [Cost Center Create/Edit](#) section.

Cost Center Extension Request

From this table you as can monitor the status of Cost Center Extension requests

Cost Center Extension Request Status							Role : Department Head
Code	Description	Request Date	Start Date	End Date	Additional Amount	Status	
000001	Jahn's CC	29/06/2010	01/02/2010	31/12/2010	12000	Submitted	

Possible Actions

- View a Cost Center Extension Request: clicking on the hyperlink on the Code will open the request in a View mode this is available on for Approved requests
- Edit a Cost Center Extension Request: on clicking of  mouse-over a Cost Center Extension request opens on a new page. Refer to [Cost Center Extension](#) section for more details
- Submit or Delete a saved Cost Center Extension Request: you would be able to  or  a Cost Center Extension Request by using the mouse-over command
- Resubmit a Returned Cost Center Extension Request: if your Cost Center Extension Request was Returned by the Account Head you can  it using the mouse-over command

Cost Centers Extension Request Status Table

Field	Input	Explanation
Code	System	Code of the Cost Center
Description	System	Description of Cost Center as entered by the Department Head
Requested Date	System	Date on which the Cost Center Extension request was submitted
Start Date	System	Start Date of Cost Center
End Date	System	Revised End Date of Cost Center
Additional Amount	System	Total additional amount which is additionally requested to be approved in the Cost Center
Status	System	There can be the following status – Draft, Approved, Rejected and Returned

Cost Center page as seen by Account Head


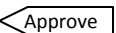

Account Head has the authority to approve the new Cost Centers and Extension requests. As the Account Head you can see the status of the Cost Centers and Extension requests submitted to you on this page.

Cost Centers Pending for Approval

From this table you can view and act upon all the Cost Centers submitted for approval.

Cost Centers Pending for Approval							Role : Account Head
Code	Description	Start Date	End Date	Requested Amount	Approved Amount	Status	
000001	Jahn's CC	01/02/2010	31/12/2010	60000	60000	Submitted	
000002	Alex CC	01/02/2010	31/12/2010	10000	10000	Submitted	

Possible Actions

- Edit a Cost Center Approval Request: clicking on the hyperlink on the Code or  mouse-over command will open the request in an edit mode
- Approve: clicking on  mouse-over command approves the request as it is submitted without any changes
- Reject: through this you can  the approval request

- Return: using this you can the Approval request for modification to the Department Head

Cost Center Pending for Approval Table

Field	Input	Explanation
Code	System	Code of the Cost Center
Description	System	Description of Cost Center as entered by the Department Head
Start Date	System	Start Date of Cost Center
End Date	System	End Date of Cost Center
Requested Amount	System	Total amount which the Cost Center is submitted
Approved Amount	System	Amount approved by the Account Head by Account Head. If the Request is in submitted status this is a default amount filled
Status	System	There can be only two status – Submitted and Resubmitted

If you want to Reject or Return the approval request you will have to give a reason for doing so.

Cost Centers Pending for Extension

From this table you can view and act upon all the Cost Centers Extension Requests submitted for approval.



Code	Description	Request Date	Start Date	Ext Date	Additional Amount	Approved Amount	Status	
000001	Jehn's CC	29/06/2010	01/02/2010	31/12/2010	12000	12000	Submitted	<input type="button" value="Edit"/> <input type="button" value="Approve"/> <input type="button" value="Reject"/> <input type="button" value="Return"/>
000004	David CC	29/06/2010	01/02/2010	30/12/2010	8000	8000	Submitted	

Possible Actions

- Edit: this opens the Extension Request and you can edit the Amount which is to be approved. You cannot change the Revised End Date
- Approve: clicking on mouse-over command approves the request as it is submitted without any changes
- Reject: through this you can the extension request
- Return: using this you can the extension request for modification to the Department Head

Cost Center Pending for Extension Table

Field	Input	Explanation
Code	System	Code of the Cost Center
Description	System	Description of Cost Center as entered by the Department Head
Requested Date	System	Date on which the Cost Center was submitted
Start Date	System	Start Date of Cost Center
Ext Date	System	Revised End Date of Cost Center
Additional Amount	System	Total additional amount which is additionally requested to be approved in the Cost Center
Approved Amount	System	Amount approved by the Account Head for extension
Status	System	There can be only two status – Submitted and Resubmitted

If you want to Reject or Return the request you will have to give a reason for doing so.

See Also

[Expense Home](#)

[Expense Request](#)

[Expense Approval](#)

[Expense Verification and Payment](#)

[Cost Center Create / Edit](#)

[Cost Center Extension](#)

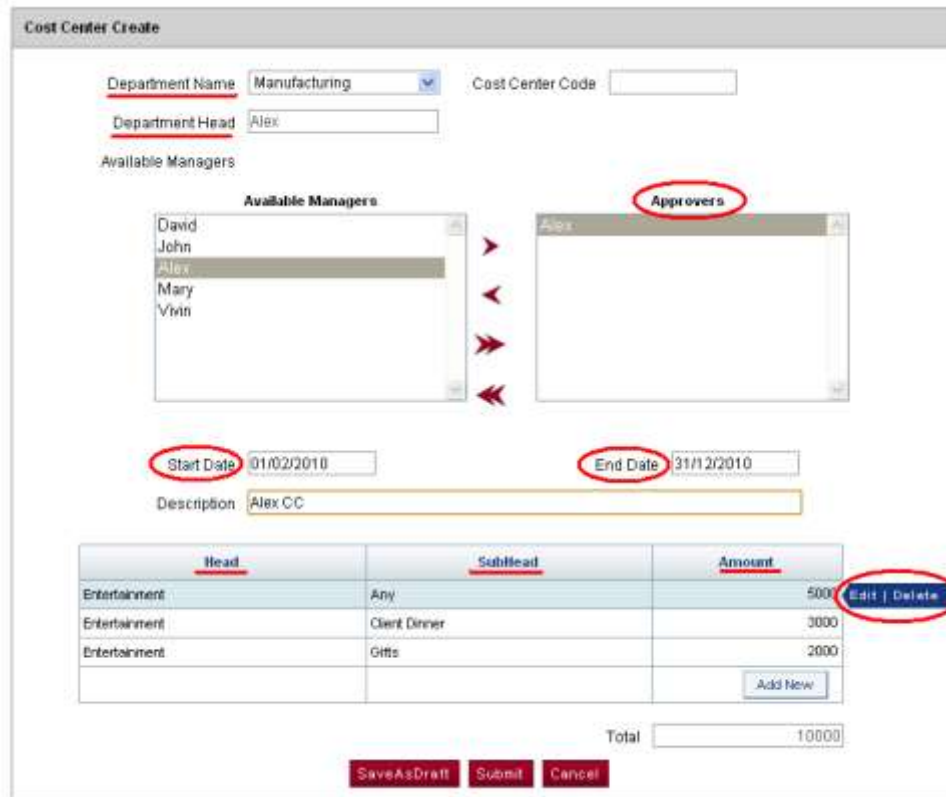
[Cost Center Closing](#)

Cost Center Create / Edit

Menu Path: HR > Expenses > Cost Center> Create or HR > Expenses > Cost Center> Edit

Accessible to: Department Head

You reach this page by clicking on **New Cost Center** button or by editing a previously saved draft of a Cost Center. Through this page you will be able to enter all the details and submit a Cost Center for approval.



Cost Center Create

Department Name: Manufacturing | Cost Center Code:

Department Head: Alex

Available Managers

Available Managers: David, John, Alex, Mary, Vivin

Approvers: Alex

Start Date: 01/02/2010 | End Date: 31/12/2010

Description: Alex CC

Head	SubHead	Amount
Entertainment	Any	500
Entertainment	Client Dinner	3000
Entertainment	Gifts	2000

Total: 10000

Buttons: Save As Draft, Submit, Cancel, Edit | Delete

Cost Center Create / Edit

Field	Input	Explanation
Department Name	Compulsory	If you are a Department Head of multiple Departments then you can select the Department for which you would like to create the Cost Center here
Cost Center Code	System / Manual	This code gets generated automatically or can be entered by you depending upon the Setup
Department Head	System	Employee name
Available Managers	List	This is a list of Managers which have are available to you to be added as Approvers in your Cost Center. All the Managers of your company are visible here
Approvers	List	This is the list of selected Managers who will function as Approvers for this Cost Center. You have to select at-least one Approver
Start Date	Compulsory	Enter the date from which you want the Cost Center to be active. You can create a Cost Center with a start date in past also but this has to be greater than the Company on-boarding date
End Date	Compulsory	Enter the date on which the Cost Center will expire. This has to be either today's date or a date in future, you cannot enter a past date here
Description	Compulsory	Description of Cost Center
Head	Compulsory	Select one or more Heads which will be part of this Cost Center, you can select one Head multiple times within a Cost Center if it is linked to different Sub Heads
Sub Head	Compulsory	For each selection of Head select a Sub Head
Amount	Compulsory	Budget which would be allocated to this Head / Sub Head combination

Possible Actions

- Save as Draft: you can save the Cost Center details as draft and reopen at a later point
- Submit: you can submit this Cost Center for approval to the Account Head

See Also

[Expense Home](#)

[Expense Request](#)

[Expense Approval](#)

[Expense Verification and Payment](#)

[Cost Center](#)

[Cost Center Extension](#)

[Cost Center Closing](#)

Cost Center Extension

Menu Path: HR > Expenses > Cost Center > Extension

Accessible to: Department Head

Only Department Heads are authorized to create the request for Extension of Cost Center which then approved by the Account Head. As a Department Head you can create an extension request through mouse-over command on the right side of the request of the [Cost Center](#) page.

Cost Center Extension

Department Head: Cost Center Code:

Department Name: Start Date:

Revised End Date: End Date:

Description:

Head	Sub Head	Amount	Additional Amount
Travel	Air	20000	
Travel	Any	20000	0
		40000	Total

[Edit](#)

Cost Center Extension Form

Field	Input	Explanation
Department Name	System	Department to which the Cost Center belongs
Cost Center Code	System	Code
Department Head	System	Department Head
Start Date	System	Start Date from which the Cost Center is valid
End Date	System	End Date on which the Cost Center will expire
Revised End Date	Compulsory	If the extension is for days then this will capture the revised end date
Description	System	Description of Cost Center
Head	System	Head part of Cost Center
Sub Head	System	Sub Head part of Cost Center
Amount	System	Budget which has been currently approved for this Head / Sub Head combination
Additional Amount	Compulsory	Additional budget which is to be requested through this extension request

Possible Actions

- Save as Draft: you can save the Cost Center Extension request as draft and reopen at a later point
- Submit: you can submit this Cost Center Extension request for approval to the Account Head

Rows in this table cannot be deleted by the department Head; he can only give the additional amount or add a row by using the [Add](#) button. Once this request is approved the Revised End Date becomes the End Date of the Cost Center.

See Also

[Expense Home](#)

[Expense Request](#)

[Expense Approval](#)

[Expense Verification and Payment](#)

[Cost Center](#)

[Cost Center Create / Edit](#)

[Cost Center Closing](#)

Cost Center Closing

Menu Path: HR > Expenses > Cost Center > Closing

Accessible to: Department Head

Department Head can close the cost center even before the actual end date by using this menu.

Cost Center Closing

Department: Cost Center Code:

Head: Revised End Date:

Start Date: End Date:

Description:

Head	Sub Head	Amount	Remaining
Travel	Air	20000	20000
Travel	Any	20000	20000
Total		40000	40000

Cost Center Closing Form

Field	Input	Explanation
Department Name	System	Department to which the Cost Center belongs
Cost Center Code	System	Code
Department Head	System	Department Head
Start Date	System	Start Date from which the Cost Center is valid
End Date	System	End Date on which the Cost Center will expire
Revised End Date	Compulsory	This is the date on which the Cost Center will close. This date can only be between today's date and the End date entered earlier
Description	System	Description of Cost Center
Head	System	Cost Center Head
Sub Head	System	Cost Center Sub Head
Amount	System	Budget which has been currently approved for this Head / Sub Head combination
Remaining	System	Amount which is remaining in each Head / Sub Head combination in this Cost Center

Possible Actions

- Submit: you can this Cost Center Closing request it gets processed in the system immediately and the Cost Center will close on the date which you have indicated. The funds which remain in the Cost Center will remain unutilized.

As a Department Head you can reactivate a closed Cost Center by sending a [Cost Center Extension](#) request to the Account Head.

See Also

[Expense Home](#)

[Expense Request](#)

[Expense Approval](#)

[Expense Verification and Payment](#)

[Cost Center](#)

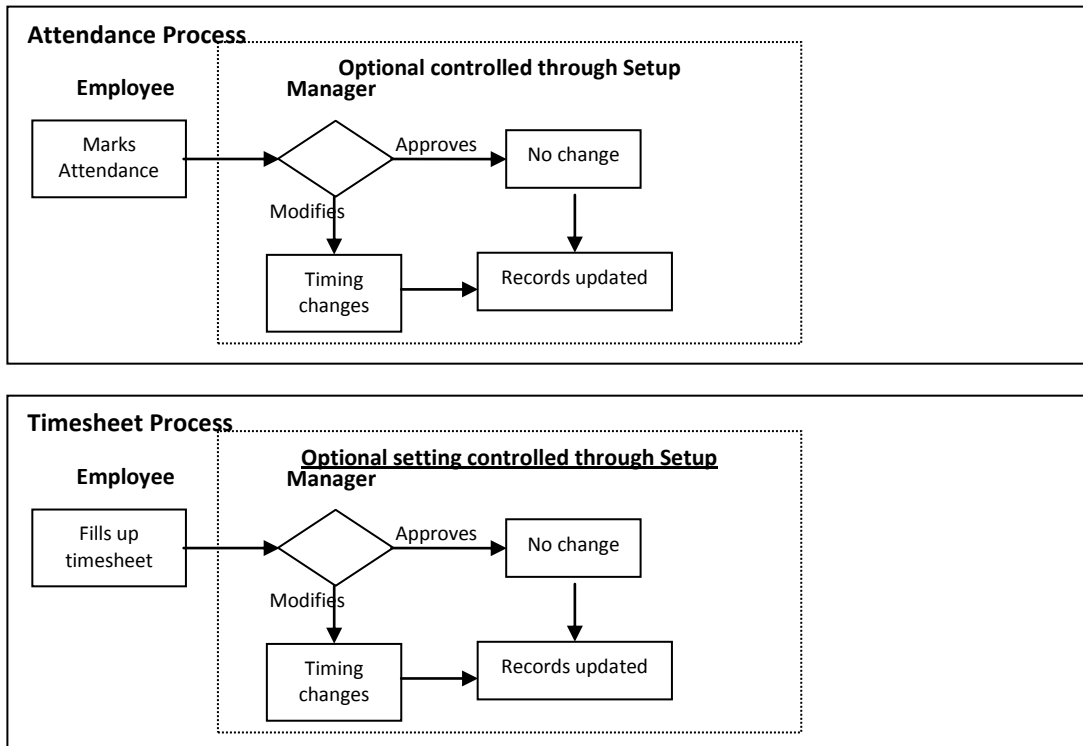
[Cost Center Create / Edit](#)

[Cost Center Extension](#)

Attendance and Timesheet

Attendance and Timesheet module is used to record daily attendance, breaks, timesheet recording and submissions. Through setup the desired configuration can be achieved.

Process Overview



Definitions

Attendance

Attendance is recorded on a daily basis. Based on the setup it could be only taken as a Present / Absent status or can also include the timestamps which are captured through the online application or in some cases can be used to record the breaks also which are taken by the Employees.

Timesheet

Timesheet can be filled up on a monthly or weekly frequency. To fill a timesheet Employee must have been added to some Charge Codes. A timesheet can have the following statuses

- Pending: timesheet submission is overdue since the last date has gone by
- Draft: timesheet has been created by employee but not yet submitted for approval
- Submitted: timesheet has been submitted to the manager for approval but not yet approved
- Approved: timesheet has been approved by the manager

Project Code

Project code is created to capture time spent on any internal or external project. Each project code is further mapped to multiple Charge codes.

Charge Code

Charge codes are used to capture time for activities which are similar in nature for example – bid preparation, design, testing, customer presentation, conference call – these can all be used as Charge codes. Time in a timesheet is finally booked against a Project code and Charge code combination.

Overtime

Overtime is defined as time worked by an employee beyond normal working hours. There are three ways of calculating overtime – refer to the section on [Manage Overtime Setup](#) for more details.

Undertime

Undertime is defined as the time less than the normal working hours. This situation will arise if employee records less time than the normal time but not if he takes a leave.

See Also

[Attendance and Timesheet Setup](#)

[Shift Master Data Setup](#)

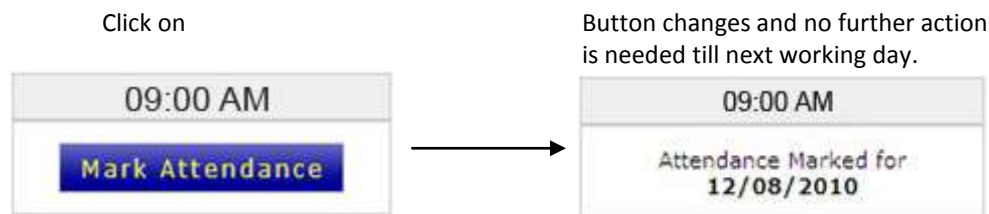
[Project and Charge Code Setup](#)

Marking of Attendance

Attendance can be marked by employees by logging on to their account and then clicking on the Mark Attendance button. The process of marking attendance is configurable through setup – read more at [Attendance Setup](#) section.

Depending upon the setup the employee would be expected to perform one of the following actions through the Attendance Control buttons on the screen.

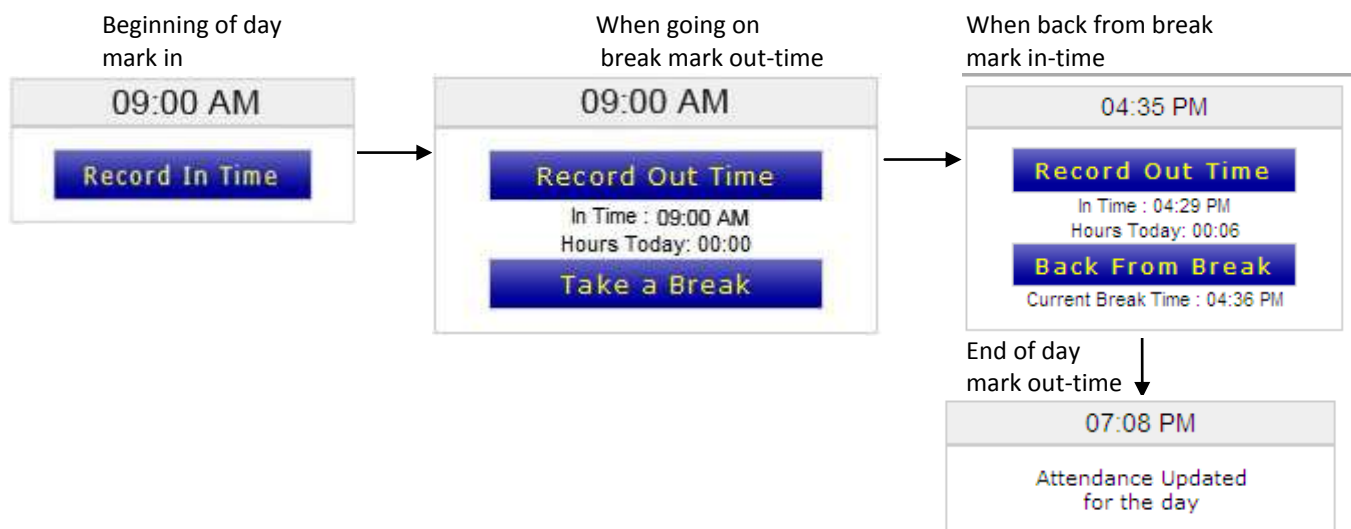
Option 1 – Mark attendance only



Option 2 – Mark attendance with timestamp



Option 3 – Mark attendance with timestamp and record breaks

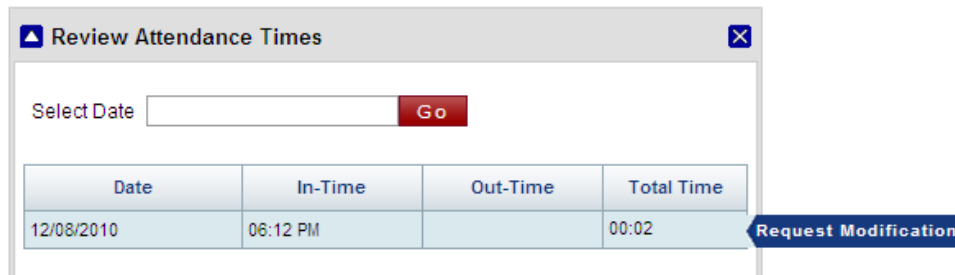


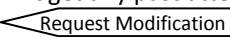
If you have requested for and have got an approval for a leave on a particular day then you cannot mark attendance on that day. To do so you will have to first withdraw the leave, refer to the section on [Leave Withdrawal](#) for more details.

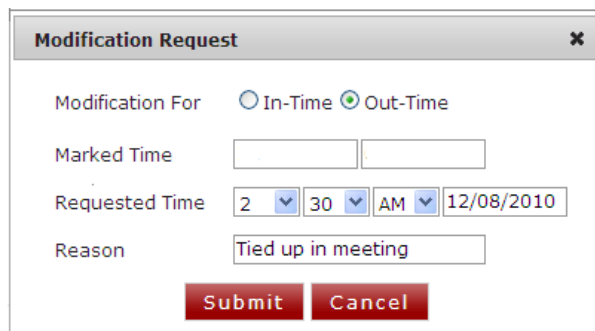
Attendance can be marked only once in a day for example if you are assigned a shift from 09:00 to 18:00 then you can mark attendance for the day anytime from 00:00 to 23:59. If you are assigned a shift which spreads over two days, for example – 08:00 pm to 04:00 am then you can mark attendance anytime from 12:00 to of the day to 11:59 next day (this scenario is true for any shift which spans over midnight).

Review Attendance and Request Modification

Users can see the status of their attendance on their dashboard through a widget.



Through this widget any past attendance record can be retrieved and employees can request a modification through the  mouse-over command. The following dialogue box opens up



Possible Actions

- Select the time which has to be modified from the checkbox
- Enter the time which you want to be replaced in requested time
- If you have to change the date – for example you might have forgotten to check out and would be requesting a new modified time for previous date you can do so
- Enter the reason for giving this modification request

This request goes to the Manager on submission.

Today's Attendance Status

This widget is available on the dashboard and through this Managers can see the status of today's attendance for all their team members. They can see who has marked his attendance and at what time and towards the end of the day can also see when employees starting marking out times.

Employee Name	Time In	Time Out	Status
John	04:29 PM	10:00 PM	Present Full Time
Paul	09:30 AM	05:00 PM	Present Full Time
Tony	06:12 PM		Present Full Time

Employees who are on Leave will be shown with status On Leave and if they come to Office they will not be allowed to mark their attendance unless they first put in a Leave withdrawal request. But they will be allowed to mark attendance if they come on a holiday or a weekly off.

See Also

[Update Timesheets](#)

[Approve Timesheets](#)

[Approve Attendance](#)

Update Timesheets

Menu Path: HR > Timesheets > Home

Accessible to: User

Timesheet is filled up by employees and submitted to manager for approval. Timesheet can be filled up on a weekly or monthly basis.

View Timesheets

All past timesheets can be viewed from this section. Timesheets in Approved, Submitted, Pending and Draft status can be reviewed from here.

Timesheet Status

View Timesheet

Select Status: Submitted View

Submitted TimeSheet: Period
8-Aug

Create New Timesheet

Weekly Timesheet x

Prefill from previous

Week of : 08/08/2010

Project Code	Charge Code	8/8 Sun	9/8 Mon	10/8 Tue	11/8 Wed	12/8 Thu	13/8 Fri	14/8 Sat	Total
PC01	CC01		8:00	7:30	8:30	7:00	7:30		38:30
									Add New
Day Total		00:00	08:00	07:30	08:30	07:00	07:30	00:00	38:30
Hours Available		9:30	9:30	9:30	9:30	9:30	9:30	9:30	66:30

Remarks:

Submitted by John on 13/08/2010 12:03:18 PM

Cancel

Approved, Submitted timesheets can be opened only in View mode while Draft or Pending timesheets can be opened only in Edit mode.

Create New Timesheet button can be used to create a new timesheet. The period for which the timesheet has to be created is selected from the popup.

Create Timesheet
✖

Prefill from previous

Week of : 08/08/2010

Project Code	Charge Code	8/8 Sun	9/8 Mon	10/8 Tue	11/8 Wed	12/8 Thu	13/8 Fri	14/8 Sat	Total
PC01	CC01		8:00	7:30	8:30	7:00	7:30		38:30
		Add New							
Day Total		00:00	08:00	07:30	08:30	07:00	07:30	00:00	38:30
Hours Available		9:30	9:30	9:30	9:30	9:30	9:30	9:30	66:30

Delete

Remarks

Save as Draft
Submit for Approval
Cancel

Possible Actions

- If the checkbox “Prefill from previous” is selected then the timesheet gets prefilled with all the data which was there in previous period’s timesheet. If previous period timesheet is not yet submitted then it will take the period before that.
- Select the Project Code and Charge Code you want to add to your timesheet – only those codes which are assigned to you will come in the drop downs.
- Enter remarks which you want to share with your Manager
- You can save the timesheet using Save As Draft button or submit it for approval using Submit for Approval button

In the timesheet view you will be able to fill up the time spent on different activities in HH:MM format. The total time which you can fill up in a day is governed by the setting done for you by the Application Administrator. Any remark which you want to be read by your approving manager can also be inputted here.

See Also

- [Update Timesheets](#)
- [Approve Timesheets](#)
- [Approve Attendance](#)

Approve Timesheets

Menu Path: HR > Timesheets > Approve Timesheets

Accessible to: Managers

Managers can review, edit and approve timesheets submitted by their team members on this page. As a manager however you cannot return or reject the timesheet.

Approve Timesheets

Employee Code	Employee Name	Week	Available	Billed	Unbilled
TPC2	John	8-Aug		38.30	0.00
TPC3	Alex	8-Aug		0.00	35.30

Edit | Approve

Alex time sheet for week of 8-Aug
✕

Week of : 08/08/2010									
Project Code	Charge Code	8/8 Sun	9/8 Mon	10/8 Tue	11/8 Wed	12/8 Thu	13/8 Fri	14/8 Sat	Total
PC03	CC03		9.00	8.00	8.00	9.00	9.30		
									Add New


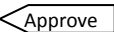
Remarks

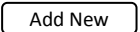
Save as Draft
Approve
Cancel

Approve Timesheets Table

Field	Input	Explanation
Employee Code	System	Employee Code
Employee Name	System	Employee Name
Week / Month	System	Week or Month for which the timesheet has been submitted
Available	System	Total time available for time booking in the period. Any holidays or weekly offs are considered as time not available for booking
Billed	System	Total time booked under billed charge codes
Unbilled	System	Total time booked under unbilled charge codes

Possible Actions

- Use  mouse-over to edit and modify a timesheet
- Use  mouse-over command to directly approve a timesheet

When the manager wants to edit he can either change the time booked or also add a Charge code or add a new row using the  button. He can also provide a comment in the Remarks field to let the employee know the reason for changing the timesheet. Changes made are saved and an audit trail captures the date when the changes have been made.

See Also

[Mark Attendance](#)

[Update Timesheets](#)

[Approve Attendance](#)

Approve Attendance

Menu Path: HR > Timesheets > Approve Attendance

Accessible to: Managers

Managers can approve attendance, approve modification of attendance or update missing attendance on behalf of the employee from this page. Depending upon the setup there are two different tables which are available for approving attendance

<u>Approve Attendance</u>					
Employee Code	Employee Name	Date	Time-In	Time-Out	Total Breaks
TPC7	Paul	08/08/2010	09:30	17:00	0:0
TPC7	Paul	12/08/2010	09:30	17:00	0:0
TPC8	Tony	12/08/2010	18:12		0:0

Edit | Reject | Approve

Approve Attendance Table

Field	Explanation
Employee Code	Employee Code
Employee Name	Employee Name
Date	Date for attendance record
In-Time	Time at which the employee has clocked in
Date	Date of clocking out
Out-Time	Time at which the employee has clocked out
Total Breaks	The total time spent in breaks

Possible Actions

- Use mouse-over to edit and modify a record
- Use mouse-over command to approve an attendance record
- Use mouse-over command to reject the attendance record

Break time cannot be edited. Approval would update the record with new times. Rejection would mark the employee as Absent.

Time Clock Modifications

Requests for modification of time clock sent by employees come in this section. Managers can review, edit, approve or reject these requests.

<u>Approve Time Clocking Modifications</u>					
Employee Code	Employee Name	Date	Type	Actual Time	Modified Time
TPC8	Tony	12/08/2010	Time-In	18:12	15:30

Edit | Reject | Approve

The structure of this table is very similar to the Approve Attendance table described above but with more details.

Mark Attendance on Behalf of Employees

There can be cases when employees are either travelling or do not have access to systems and they are not able to mark their attendance in the application. These records are treated as Null records and are made available to the manager from next day to update on behalf of the employee. If it's a weekly off or a holiday in the office or if the employee has taken a leave then this record would be updated appropriately and will not go to the manager.

Mark Attendance on behalf of Employee

Employee Code	Employee Name	Date	Mark Attendance
TPC7	Paul	11/08/2010	Present Half Time
TPC8	Tony	01/08/2010	Present Full Time
TPC8	Tony	02/08/2010	-Select- Absent Compensatory Off Holiday On Leave Present Full Time Present Half Time Restricted Holiday Weekly Off

Possible Actions

- Mark attendance as "Present" if the employee was working
- Mark attendance as "Leave Without Pay" if the employee has gone on unplanned leave.

Note: Even if the manager marks the attendance as Leave Without Pay the employee has the option to get it withdrawn through a Leave withdrawal request. If this is done then he would be automatically marked present. Refer to [Leave Withdrawal](#) for more information.

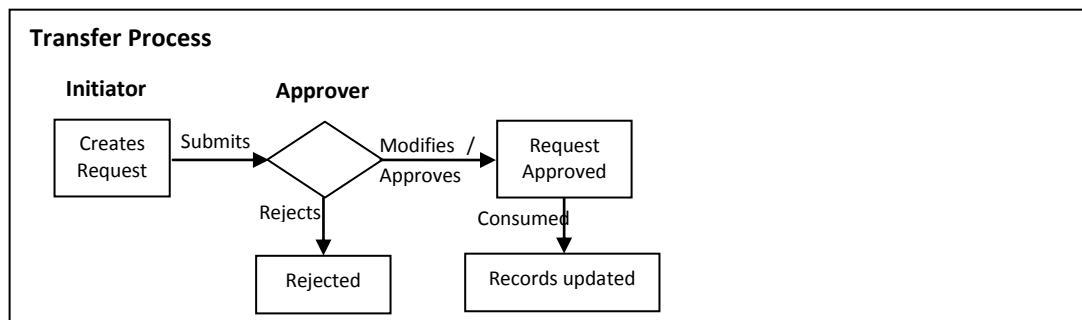
See Also

- [Mark Attendance](#)
- [Update Timesheets](#)
- [Approve Timesheets](#)

Transfers

Transfer Module is designed to allow the Managers and Department Heads to initiate and complete the transfers of their Employees.

Process Overview



Definitions

Department Transfer

When you as a Department Head want to transfer the employee from one department to another this process is used. This allows for approvals and updation of Employee records as he gets transferred. For the process to be completed the new department head has to approve the transfer.

Types of Department Transfer

There are two types of department transfers which can be handled in the application.

1. Permanent Transfer: under this the employee is permanently moved to the new department
2. Temporary Transfer: using this employee is given to another department temporarily. The transfer is reversed on the End Date of Temporary transfer.

Manager Transfer

When you as a Manager want to transfer the employee who is under you to another Manager you can use this process. For the process to be completed the new Manager has to approve the transfer request.

Location Transfer

If yours is a multi-location company and employees get transferred from one location to another then this process should be used to get the approvals and update the records. The Manager can initiate the request for Location Transfer and it is approved by the CEO.

Any transfer request can be made with a future or past date. Future dated transfer requests will come into effect on the day automatically. You cannot enter a transfer request with effective date in past.

See Also

[Transfer Home](#)

[Department Transfer](#)

[Location Transfer](#)

[Manager Transfer](#)

Transfer Home

Menu Path: HR > Transfers > Home

Accessible to: User, Manager, Department Head, CEO

Transfer Home page as seen by User

As a User you can see the status of the transfer request submitted by your Manager on this page. Here you can see all the transfer requests – in process or completed in the “Transfer Request Status” table.



Ref No	Dated	Request	Name	New Details	Status
132	03/05/2010	Manager	John	Alex	Submitted
81	22/04/2010	Manager	John	David Singh	Rejected

Transfer Request Status Table

Field	Input	Explanation
Reference No.	System	Serial number of the request
Dated	System	Date when the request was raised
Request	System	Type of Transfer(refer link for explanation)
Name	System	On whose name the request has been raised by the Department Head
New Details	System	New details of the employee as per Transfer request
Status	System	Status can be Submitted, Accepted, Rejected

Possible Actions

- View the request: as an employee you can only view the transfer requests. When you click on the hyperlink you can see a detailed view of transfer request where you can see
 - Details of your request
 - Name of the approver
 - New department transferred to
 - New office transferred to
 - New location transferred
 - Status of the request
 - Remarks of the approver

Transfer Home page as seen by Manager, Department Head and CEO

As a Manager you will see two tables on this page

- Transfer Request Status – this table will show the status of Transfer Requests submitted by you as a Manager
- Transfer Request Pending for Approval – this table will show the status of Transfer Requests awaiting your approval

[Transfer Home](#) Quick help on this page

Transfer Requests Status

Transfer Requests Status Role : Manager

Ref No	Dated	Request	Name	New Details	Status
131	03/05/2010	Location	Paul	TPC,Noida	Rejected
132	03/05/2010	Manager	Tony	Alex	Submitted
119	26/04/2010	Location	Paul	TPC,Noida	Draft
83	22/04/2010	Department	Paul	Corporate	Submitted
81	22/04/2010	Manager	Tony	David Singh	Rejected

[Edit](#) | [Submit](#) | [Delete](#)

Transfer Requests Pending for Approval Role : Manager

Transfer Request Status Table

Field	Input	Explanation
Reference No.	System	Serial number of the request
Dated	System	Date when the request was raised
Request	System	Type of Transfer(refer link for explanation)
Name	System	On whose name the request has been raised by the Department Head
New Details	System	New details of the employee as per Transfer request
Status	System	Status can be Submitted, Accepted, Rejected

Possible Actions

- Edit the Request: Click on hyperlink or the [Edit](#) mouse-over command
- Submit: you would be able to [Submit](#) an Transfer request saved as Draft
- Delete a saved Transfer request: you would be able to [Delete](#) an Transfer request saved as Draft
- Withdraw: you can use [Withdraw](#) mouse-over command to withdraw a request which is in Submitted status

[Transfer Home](#) Quick help on this page

Transfer Requests Status

Transfer Requests Status Role : Manager

Transfer Requests Pending for Approval Role : Manager

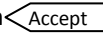
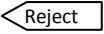
Ref No	Dated	Request	Name	New Details	Status
193	17/06/2010	Department	Mark	Corporate	Submitted
83	22/04/2010	Department	Paul	Corporate	Submitted
82	22/04/2010	Location	Mark	TPC,Noida	Submitted

[Accept](#) | [Reject](#)

Transfer Request Pending for Approval Table

Field	Input	Explanation
Reference No.	System	Serial number of the request
Dated	System	Date when the request was raised
Request	System	Type of Transfer(refer link for explanation)
Name	System	On whose name the request has been raised by the Department Head
New Details	System	New details of the employee as per Transfer request
Status	System	Status would be Submitted.

Possible Actions

- Accept: clicking on  mouse-over command request gets accepted
- Reject: use the  mouse-over command to reject the transfer request
- View: you can view the details of any request by clicking on the hyperlink

If you want to reject the request you will have to give a reason for doing so.

See Also

[Department Transfer](#)

[Location Transfer](#)

[Manager Transfer](#)

Department Transfer

Menu Path: HR > Transfers > Department

Accessible to: Department Head, CEO

As a Department Head you can create a department transfer request by going to the relevant page under the Transfers Menu. Select the details like employee name, department to be transferred to, type of transfer, effective date to complete the request.

Department Transfer [Quick help on this page](#)

Transfer Request

Ref. ID Dated

Employee Name Employee Code

Department

Transfer Type End Date

To Department Effective Date

Job Description

Remark

Department Transfer Form

Field	Input	Explanation
Ref ID	System	This would be auto fill when you open form in edit mode
Dated	System	This would be the date when request is raised
Employee name	Compulsory	Employee who has to be transferred
Employee Code	System/Manual	This code gets generated automatically or can be entered by you depending upon the Setup
Department	Compulsory	Gets updated automatically based on Employee's department name
Transfer Type	Compulsory	Select transfer type through drop down (click here to see definitions)
End Date	Compulsory	Date on which the temporary transfer ends and Employees is assigned back to home department
To Department	Compulsory	Department to which Employee is getting transferred to
Effective Date	Compulsory	Enter the date when you want this transfer to be in effect
Job Description	Optional	Job Description of the Employee in the new role
Remark	Optional	Any remarks associated with this transfer

Possible Actions

- Create a New Department Transfer Request: through this page you can create and save or create and submit a new department transfer request for your subordinates and if you are CEO then for department head and self also.

If you are not sure of your entries you can save the request by clicking on , with this your request will get saved but not submitted and once you are sure of your entries you can click on . On Submit the request goes to CEO for approval.

See Also

[Transfer Home](#)

[Location Transfer](#)

[Manager Transfer](#)

Location Transfer

Menu Path: HR > Transfers > Location

Accessible to: Manager

As a Manager you can create a location transfer request from this page. Select the details like Employee Name, New Location and Effective date to complete the request.

Location Transfer [Quick help on this page](#)

Transfer Request

Ref. ID Dated

Employee Name Employee Code

Department

Office

To Office **Effective Date**

Remark

Location Transfer Form

Field	Input	Explanation
Ref ID	System	This would be auto fill when you open form in edit mode
Dated	System	This would be the date when request is raised
Employee name	Compulsory	Select Employee name through drop down.
Employee Code	System/Manual	This code gets generated automatically or can be entered by you depending upon the Setup
Department	System	Gets updated automatically based on Employee Name
Office	System	Gets updated automatically based on Employee Name
To Office	Compulsory	Select the office where employee needs to be transferred through drop down
Effective Date	Compulsory	Enter the date when you want this transfer to be in effect
Remark	Optional	Any remarks associated with this transfer

Possible Actions

- Create a New Location Transfer Request: through this page you can create and save or create and submit a new location transfer request for your subordinates and if you are CEO then for department head and self also.

If you are not sure of your entries you can save the request by clicking on with this your request will get saved but not submitted and once you are sure of your entries you can click on . On Submit the request goes to the CEO for approval.

See Also

[Transfer Home](#)

[Department Transfer](#)

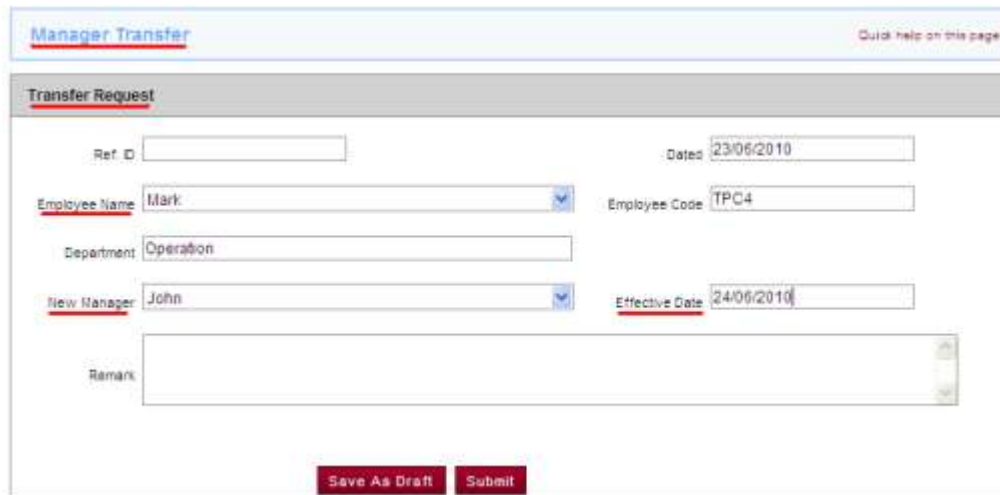
[Manager Transfer](#)

Manager Transfer

Menu Path: HR > Transfers > Manager

Accessible to: Manager

As a Manager you can create a manager transfer request from this page. Select the details like Employee Name, New Manager and Effective date to complete the request.



Manager Transfer Form

Field	Input	Explanation
Ref ID	System	This would be auto fill when you open form in edit mode
Dated	System	This would be the date when request is raised
Employee name	Compulsory	Select Employee name through drop down.
Employee Code	System/Manual	This code gets generated automatically or can be entered by you depending upon the Setup
Department	System	Gets updated automatically based on Employee Name
New Manager	Compulsory	Select the new manager through drop down
Effective Date	Compulsory	Enter the date when you want this transfer to be in effect
Remark	Optional	Any remarks associated with this transfer

Possible Actions

- Create a New Manager Transfer Request: through this page you can create and save or create and submit a new location transfer request for your Employees
- If you are not sure of your entries you can save the request by clicking on **Save as Draft** , with this your request will get saved but not submitted and once you are sure of your entries you can click on **Submit** . On Submit the request goes to the New Manager for approval

See Also

[Transfer Home](#)

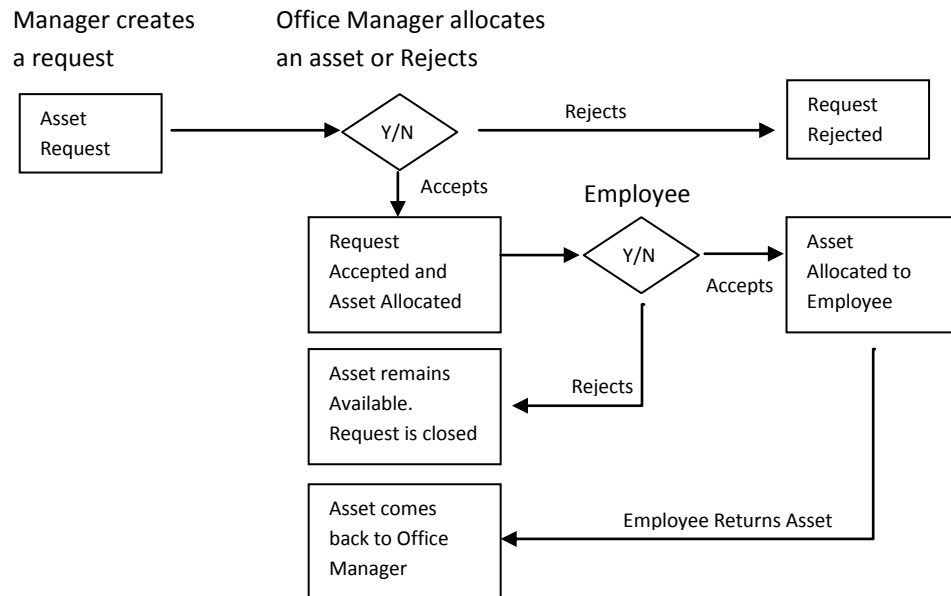
[Department Transfer](#)

[Location Transfer](#)

Assets

Assets Module is designed to allow the Manager to create asset requests for his Employees. It also allows Office Manager to approve the requests and manage the assets for the company.

Process Overview



Assets can only be requested by Managers for their Employees. Employees cannot raise a request directly. Once the Manager raises the request it has to be approved and an asset has to be allocated by the Office Manager. Once the asset request is approved by the Office Manager the Employee has to accept the allocation. At any point of time the employee can return asset allocated to him to the Office Manager.

Definitions

Assets

Laptops, Computers, Printers, Mobile phones, Vehicles, Equipment, Software are examples of assets which are given by a company to its employees to enable them to perform their work. These assets are owned by the company and there is a need to track as to where they are and also manage their utilization effectively.

Asset Category

All assets are assigned to a unique Asset Category. The Asset Categories can be created and managed by the Application Administrator.

Asset Status

An Asset can have different statuses. To see this you can go to the Register Page within Asset menu.

Draft	Asset has been created by Office Manager but not submitted
Available	Asset is in stock and can be allocated to an User

Allocated	Asset in the ownership of an User
Unavailable	Asset is not available for allocation, it is with the Administration department
Disposed	Asset has been disposed off and is no longer available for use

Controlling Asset Allocation

Depending upon the criticality and cost of assets some companies would like to track and control assets at a department level. This can be done by managing the [Asset Department Setup](#) configuration. There are three levels of asset control possible

1. All assets belong to the company and Office Manager can allocate to any employee as long as there is a valid request from a Manager
2. Assets are assigned to individual Departments but can be allocated to any employee. This helps in knowing the ownership pattern across Departments.
3. Assets can only be allocated to Employees of the department to which the Asset belongs. This is the most restrictive setup and should be done only when needed.

See Also

[Asset Home](#)

[Asset Request](#)

[Asset Allocation](#)

[Asset Register](#)

[Asset Modification](#)

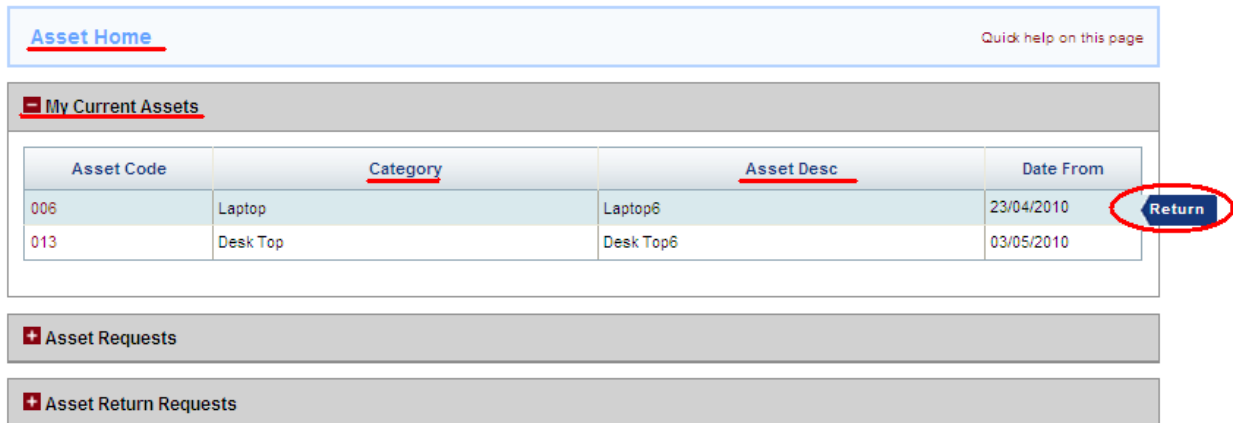
Assets Home

Menu Path: HR > Assets

Accessible to: User

Asset Home page as seen by a User

In the Asset Home page you can view all assets allocated to you in Currently Allocated Assets table. From here you can return any asset allocated to you by just clicking on the Return link which comes as a mouse-over command.



The screenshot shows the 'Asset Home' page with a 'My Current Assets' section. The table below lists assets with columns for Asset Code, Category, Asset Desc, and Date From. A 'Return' button is visible at the end of the first row.

Asset Code	Category	Asset Desc	Date From	
006	Laptop	Laptop6	23/04/2010	Return
013	Desk Top	Desk Top6	03/05/2010	

My Current Assets Table

Field	Input	Explanation
Asset Code	System	Unique code used to identify the Asset
Category	System	Category to which the Asset belongs
Asset Desc	System	Description of Asset
Date From	System	Date from which this Asset has been assigned to the User

Possible Actions

- Return: you can Return any asset allocated to you by clicking on mouse-over command Return. This will send a return request to the Office Manager
- View: you can view the details of any asset allocated to you by clicking on the hyperlink on the asset code




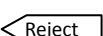
The screenshot shows the 'Asset Home' page with an 'Asset Requests' section. The table below lists asset requests with columns for Ref No, Dated, Category, Code, Desc, and Status. An 'Accept | Reject' button is visible at the end of the first row.

Ref No	Dated	Category	Code	Desc	Status	
00	22/04/2010	Laptop	002	Laptop2	Allocated	Accept Reject

Asset Requests Table

Field	Input	Explanation
Ref No	System	Reference number of the request
Dated	System	Date on which the request was sent by Manager
Category	System	Category of Asset requested / allocated
Code	System	Code of Asset of allocated
Desc	System	Description of Asset allocated
Status	System	This can have the following Status – Approved, Rejected, Allocated

Possible Actions

- Accept: by clicking on  mouse-over command request gets accepted, you can do so only to allocated requests
- Reject: through this you can  the asset request, you can do so only to allocated requests
- View: you can view the details of any asset allocated, approved or rejected by clicking on the hyperlink on the Ref No.

User can see apart from above

- Name of approver
- Remarks of the approver
- Pending status of the request, if any

Asset Home	Quick help on this page				
+ My Current Assets					
+ Asset Requests					
- <u>Asset Return Requests</u>					
<u>Ref No</u>	<u>Dated</u>	<u>Category</u>	<u>Code</u>	<u>Desc</u>	<u>Status</u>
201	22/06/2010	Laptop	003	laptop3	Submitted

If you as an employee have returned an asset which was allocated to you, then this table will show you those details.

Asset Return Table

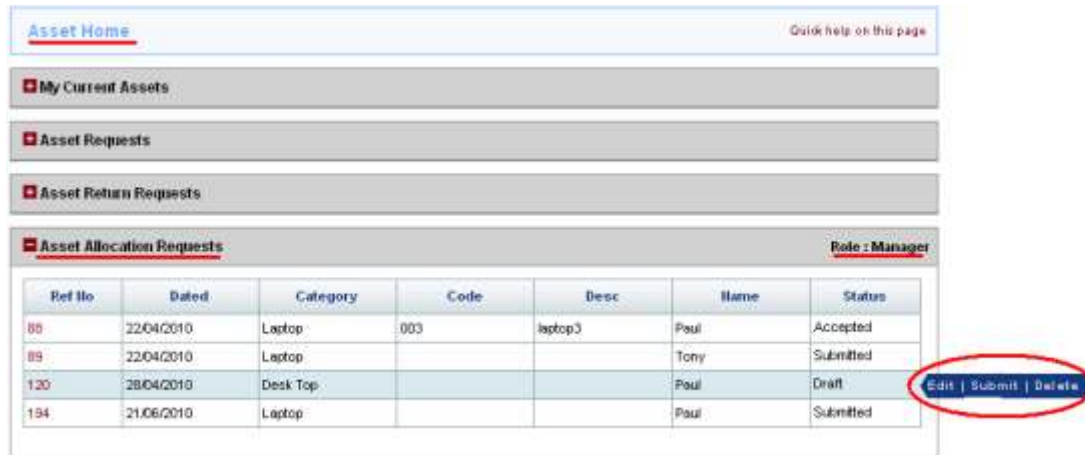
Field	Input	Explanation
Ref No	System	Reference number of the request
Dated	System	Date on which the request was sent by Manager
Category	System	Category of Asset requested / allocated
Code	System	Code of Asset of allocated
Desc	System	Description of Asset allocated
Status	System	This can have the following Status – Submitted and Rejected

Possible Actions

- View: you can view the details of any asset by clicking on hyperlink on the Ref No.

Asset Home page as seen by a Manager

As a Manager you will see an additional table Asset Allocation Requests this will have the status of all the asset allocation requests raised by you for your employees.



Ref No	Dated	Category	Code	Desc	Name	Status
80	22.04/2010	Laptop	.003	laptop3	Paul	Accepted
89	22.04/2010	Laptop			Tony	Submitted
120	28.04/2010	Desk Top			Paul	Draft
134	21.06/2010	Laptop			Paul	Submitted

Asset Allocation Requests Table

Field	Input	Explanation
Ref No	System	Reference number of the request
Dated	System	Date on which the request was sent by Manager
Category	System	Category of Asset requested / allocated
Code	System	Code of Asset of allocated
Desc	System	Description of Asset allocated
Name	System	Name of employee for whom the Asset request is made
Status	System	This can have the following status – Approved, Rejected, Allocated and Draft

Possible Actions

- Edit the Request: to do so click on hyperlink or the mouse-over command
- Submit: through mouse-over command you would be able to any asset request saved as draft
- Delete a saved asset request: through mouse-over command you would be able to an asset request saved as draft

All these actions are only possible for Draft status

Asset Home page as seen by Office Manager

As Office Manager you will see an additional table Asset Return Requests, this will have the Asset Return Requests raised by employees.

Asset Home Quick help on this page

My Current Assets

Asset Requests

Asset Return Requests

Pending Asset Return Requests Role : Office Manager

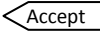
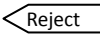
Ref No	Dated	Category	Code	Desc	Name	Status
188	17/06/2010	Laptop	002	Laptop2	Alex	Submitted
201	22/06/2010	Laptop	003	Laptop3	Paul	Submitted

Accept | Reject

Asset Return Requests Table

Field	Input	Explanation
Ref No	System	Reference number of the request
Dated	System	Date on which the Asset has been accepted by the employee
Category	System	Category of Asset requested / allocated
Code	System	Code of Asset of allocated
Desc	System	Description of Asset allocated
Name	System	Name of employee on whose name Asset request was made
Status	System	This can have the following status – Submitted, Accepted and Rejected

Possible Actions

- Accept: clicking on  mouse-over command request gets accepted
- Reject: clicking on  mouse-over command you can reject the asset return request
- View: you can view the details of any asset returned

See Also

[Asset Request](#)

[Asset Allocation](#)

[Asset Register](#)

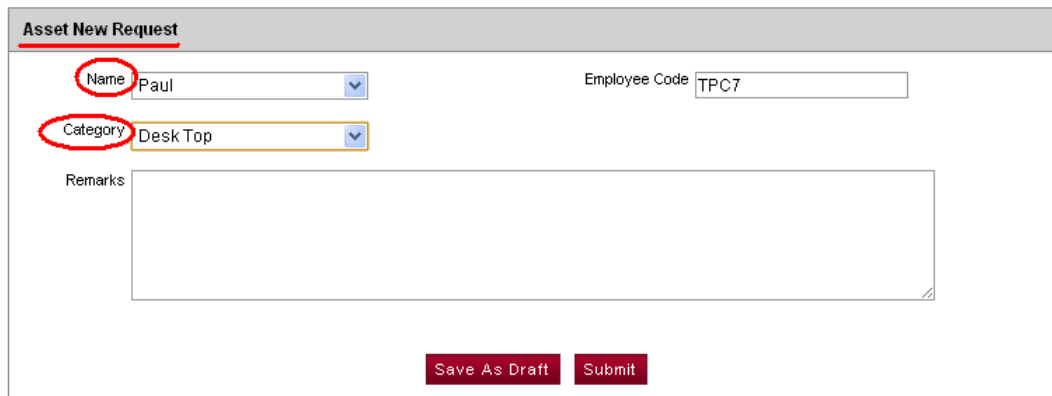
[Asset Modification](#)

Asset Request

Menu Path: HR >Assets > Request

Accessible to: Manager

Asset request are to be made by Managers for their employees. Using the [New Asset Request](#) button you can create an asset request for your employee.



Asset Request Form

Field	Input	Explanation
Employee Name	Compulsory	Select the name of Employee from drop down option on whose name Asset request has to be made
Code	System/Manual	This code gets generated automatically or can be entered by you depending upon the Setup
Category	Compulsory	Select Category from the dropdown (see the section on Asset Category for more details)
Remark	Optional	Any comments which are to be put

Possible Actions

- Submit an asset request: through this page you can create and save or create and submit a new asset request

If you are not sure of your entries please click on [Save as Draft](#) , with this your request will get saved but not submitted and once you are confirmed that your entries are valid click on [Submit](#) . You can access your saved draft in the Asset Home page in Asset Allocation Request table.

On Submit the request will go to the Office Manager for approval.

Office Manager has the final authority to approve or reject asset request. The request submitted by user's Manager goes to him for final approval. As a Manager you can request only one asset per request for an employee however you can create multiple requests at the same time.

See Also

- [Asset Home](#)
- [Asset Allocation](#)
- [Asset Register](#)
- [Asset Modification](#)

Asset Allocation

Menu Path: HR > Assets > Allocation

Accessible to: Office Manager

Office Manager has the authority to allocate the assets to the employees. To allocate an asset you need to click on the Available Assets drop down, it will show you all the assets which are available to be allocated for this request. If you have chosen to allocate assets only within the department that owns the asset then the Available Assets drop down will show only assets available within the department.



Asset Allocation Form

Field	Input	Explanation
Req ID	System	Serial number of the request
Dated	System	Date on which request was raised
Name	System	Employee for whom the request has been raised
Category	System	Category of Asset requested
Available Asset	Compulsory	Need to select from the drop down, the list of Asset available for allocation

Possible Actions

- Approve the Request: After you select the asset to be allocated you approve the request by clicking on mouse-over command
- Reject: clicking on mouse-over command rejects the request
- View: When you click on the hyperlinked Req ID detailed view of asset request will be visible

If you want to Reject the request you will have to give a reason for doing so.

See Also

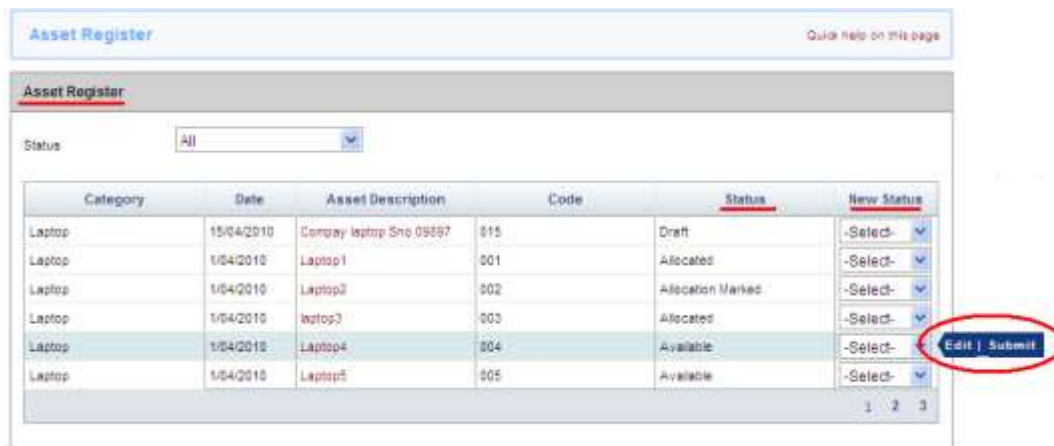
- [Asset Home](#)
- [Asset Request](#)
- [Asset Register](#)
- [Asset Modification](#)

Asset Register

Menu Path: HR > Assets > Register

Accessible to: Office Manager

This page is used by Office Manager to add new assets and to maintain the status of assets in his control.



Category	Date	Asset Description	Code	Status	New Status
Laptop	15/04/2010	Company laptop SNo 09897	015	Draft	-Select-
Laptop	1/04/2010	Laptop1	001	Allocated	-Select-
Laptop	1/04/2010	Laptop2	002	Allocation Marked	-Select-
Laptop	1/04/2010	Laptop3	003	Allocated	-Select-
Laptop	1/04/2010	Laptop4	004	Available	-Select-
Laptop	1/04/2010	Laptop5	005	Available	-Select-

Asset Register Table

Field	Input	Explanation
Category	System	Category of Asset
Dated	System	Date on which Asset was acquired
Asset Description	System	Details of Asset
Code	System	Code of Asset either system generated or manually created by the Office Manager while creating new Asset in Asset Modification page
Status	System	Asset can have multiple status - see the section on Asset Status for more details
New Status	Optional	Updated asset status

Possible Actions

- Edit: Clicking on hyperlink or the mouse-over command will take you to a form where you can update any Asset details including code, acquired date, department, description, cost, remarks, status.
- Submit: if you want to make any changes to the Status you will select the New Status and then

Only assets those are in “Available” status can be disposed off by the Office Manager. To do so you change the status to “Disposed”, you will have to record the reasons for disposal. Once an Asset has been disposed off then it cannot be added back to the inventory.

If the company has selected the option of controlling [Asset Department Setup](#) in HR Setup then you can only assign an asset belonging to a department to an employee from the same department.

See Also

[Asset Home](#)

[Asset Request](#)

[Asset Allocation](#)

[Asset Modification](#)

Asset Modification

Menu Path: HR > Assets > Register > Create

Accessible to: Office Manager

New assets can only be created by Office Manager by going to Asset Modification Page. Office Manager can go to this page by clicking New Asset Button on the right side of Asset Register Page.

Asset Modification

Category Laptop Acquired Date 06/04/2010

Code

Description Laptop1

Department Administration Cost 30000

Remark

Save as Draft
Submit

Asset Modification Form

Field	Input	Explanation
Category	Compulsory	To be selected by the Office Manager through drop down
Acquired Date	Optional	Date when the asset was acquired by the office manager
Code	Compulsory	Code of asset can be system generated or can be entered by the Office manager as per the company's policy
Description	Optional	Details of Asset
Department	Optional / Compulsory	This is compulsory if Assets have to controlled at Department level
Cost	Optional	Cost of the Asset
Remark	Optional	Any comments which are to be put
Status	Compulsory	If Office Manager wants to change the status of an Asset

Possible Actions

- Create a New Asset: through this page you can create and save or create and submit a new asset

If you are not sure of your entries please click on Save as Draft , with this your request will get saved but not submitted and once you are confirmed that your entries are valid click on Submit .

Status field will be visible when Office manager open the Modification form in edit mode from Asset Register page.

See Also

[Asset Home](#)

[Asset Request](#)

[Asset Allocation](#)

[Asset Register](#)

EazeHR Reports

Standard reports are available with EazeWork these reports are accessible from Reports Menu. All Users, Managers, CEO can access these reports but can view only relevant data.

Reports in the application have the following features

- Export to Excel: reports can be exported and saved as a Microsoft Excel document
- Export to PDF: reports can be exported and saved as an Adobe Acrobat document
- Print: you can print the report locally
- Email : report can be emailed to your registered email id

Users can decide what is the level of aggregation which they want in numbers and reports can be generated in thousands, millions, lakhs, crores etc.

Standard Reports

Fifteen reports are available as Standard Reports.

Custom Reports

At this stage the feature to create custom reports is not there.

Employee Reports

This section has the reports useful for Employees.

Employee List

This report shows all the Active Employees in the company and their basic details. This report is available to all Users to view, download and print.

Department List

This report shows all the Departments and basic information about the Departments like Department Head, Number of Managers and Number of Employees. This report is available to all Users to view, download and print.

Leaves Reports

This section has the reports linked to Leaves module.

Leave by Department

This report helps to assess the level of leaves being taken by Employees across Departments. Total number of leaves is compared with total number of working days to arrive at a leave percentage.

This report is generated for a time-period as given by the User.

Report is accessible to

- Department Head: he can see data for only his own Departments
- HR Manager: he can see data for all Departments
- CEO: he can see data for all Departments

Employee Leave Report

This report helps to monitor the amount of leaves being taken by Employees. Information on how many days by which leave type have been taken for a certain period is captured and presented in this report. This report is generated for a time-period as given by the User.

Report is accessible to

- Manager: he can see data for only Employees reporting to him
- Department Head: he can see data for all the Employees in his Departments
- HR Manager: he can see data for all Employees
- CEO: he can see data for all Employees

Expense Reports

This section has the reports linked to Expenses module.

Active Cost Center by Department

Cost Centers which are active at currently can be viewed through this report, the amount which has been approved in each Cost Center and the amount which is remaining is also shown.

Report is accessible to

- Department Head: he can see only Cost Centers belonging to his own Departments
- Account Head: he can see all Cost Centers across all Departments
- CEO: he can see all Cost Centers across all Departments

Closed Cost Center by Department

For any time period Cost Centers which were closed and the amount of budget which remained un-utilized will be available through this report.

Report is accessible to

- Department Head: he can see only Cost Centers belonging to his own Departments
- Account Head: he can see all Cost Centers across all Departments
- CEO: he can see all Cost Centers across all Departments

Expense Claims Status

This report will help to review the status of Expense Claims put in by the Employees. An aggregate view of all Expense Claims submitted, processed and paid is available here.

Report is accessible to

- Department Head: he can see only Expenses belonging to his own Departments
- Account Head: he can see all Expenses across all Departments
- CEO: he can see all Expenses across all Departments

Attendance and Timesheet Reports

This section has the reports linked to Attendance and Timesheet module.

Department Attendance Report

This report shows all summary of attendance across departments for a period and reports absenteeism. Report is accessible to

- Department Head: for his own Departments
- CEO and HR Manager: for all Departments

Employee Attendance

This report shows the details of attendance at employee level. Report is accessible to

- Manager: for his own Employees
- CEO and HR Manager: for all Employees

Timesheet Summary

This report shows the total time booked against a Project Code and also the time which has been submitted but not approved. Report is accessible to

- Project Manager: for his Projects
- CEO and HR Manager: for all Projects

Timesheet Details

This report shows the details of time booked for a Project across weeks at employee level. Report is accessible to

- Project Manager: for his Projects
- CEO and HR Manager: for all Projects

Overtime / Undertime Report

This report shows the total overtime or undertime booked by an employee over a period. Report is accessible to

- Each Employee: for his records
- Manager: for his own Employees
- Department Head: for Employees in his Department
- CEO and HR Manager: for all Employees

Daily Attendance

This report shows the daily attendance record of each employee. This report is accessible to

- Each Employee: for his records

Asset Reports

This section has the reports linked to Assets module.

Assets Owned by Company

This report shows all summary of all the Assets which are owned by the Company and their allocation status.

Report is accessible to

- Department Head: he can see only Assets belonging to his own Departments
- Office Manager: he can see all Assets across all Departments
- CEO: he can see all Assets across all Departments

Assets Allocated to Employees

This report shows the Assets which are allocated to Employees and gives details of the Employee they are allocated to.

Report is accessible to

- Manager: he can see only Assets belonging to his own Employees
- Office Manager: he can see all Assets for all Employees across all Departments
- CEO: he can see all Assets across for all Employees across all Departments

Glossary

A

Accountant

Role given to a person who is responsible for collecting payment or disbursing payments to employees.

Account Head

Role given to the head of Accounts department. He is responsible for approval of expenses, cost centers in HR application.

Account Validation

Process through which the Application Administrator validates the company as a valid company before any EazeWork application can be used.

Accrual Method

Method through which leaves are credited into an employee's account.

Acquired Date

Date on which an asset is purchased by the company.

Activate

Status of an entry or record which makes it available to the system for processing.

Allocated

Asset status after it has been allocated to an Employee.

Allocation Marked

Asset status when it is in the process of being allocated to an Employee.

Application Administrator

Role which gives the access to Setup and allows the user to add or delete user. This is the most important and powerful role.

Approver

This is a role which is given as per the process design to the user who has the authority to approve the request.

Approver Approved Amount

Expense amount approved by the first level approver.

Account Head Approved Amount

Expense amount approved by the Account Head.

Approver List

List of all the Approvers available to the Department Head for inclusion in the Cost Center.

Asset Category

Category to which an Asset belongs.

Asset Register

Table keeping the status of all the Assets in the company. Accessible to only the Office Manager.

Asset Request

A request for allocation of an Asset. Submitted by a manager on behalf of the employee.

Asset Return

Process through which the employee returns the asset allocation to him back to the Office Manager.

Attendance

Daily attendance record of employees.

Attendance Control

The buttons which allow users to mark their attendance and a break.

B

Billed

Time which can be billed to customers. Each Charge Code is classified either as Billed or Unbilled.

Break Time

Time of break during which the employee is not working. He marks the start and end time of a break using the onscreen control.

Budget

Budget which is approved and assigned to a Cost Center by the Account Head.

C

Calendar

Calendar captures the working days, holidays and leaves for an employee. Calendar can be defined at company level, location level or employee level.

Carry Forward

Leaves can be carried forward to the next year or if they are not carried forward they lapse.

CEO

A role which is given to the senior most person – typically the head of the company. The person having this role has access to almost all the data.

Charge Codes

Codes used by the company to standardize the booking of time against activities.

Check Box

A small square box used to make a selection.

Claim Amount

Amount which is claimed through the Expense claim request.

Compensatory Off

A leave category which is used to give leaves in lieu of work done on holidays.

Cost Center

Cost Center is used to allocate budget and control expenses. For more information [click here](#).

Cost Center Closing

The process by which a Cost Center is closed.

Cost Center Extension

The process by which a Cost Center duration or budget is increased.

D**Dashboard**

The page where summary information like alerts, graphs, status messages are available. It gives a snapshot of various aspects of the processes and the relevant business information.

Date of Joining

The date on which employee has joined the company.

Deactivate

Making a record unavailable for processing. The record is not deleted but is not available for further use till it is Activated again.

Default Calendar

Calendar which gets applied to the whole company as a default if not further classifications are specified.

Delete

Removal of a transaction or record permanently from the application. Deleted records cannot be recovered.

Department Transfer

Transfer from one department to another.

Designation

The title which an employee is given. Designation is normally linked to the Seniority Level but can be different also.

Disciplinary Leave

A leave which is created by the manager when an employee is absent without any prior information. This is an additional attribute and any leave type can be created as a Disciplinary Leave.

Display Order

Display Order is used to set the order in which various values come in a drop down. Numeric value of 1 is the highest and those with value 2 will come lower than those with value 1 in the drop down.

Disposed

Status denoting assets which are no longer available for use.

Draft

A request or any other record can be saved as a draft in the beginning. A draft is not visible to any other person and also does not create any linkage and hence can be deleted any time.

E**EazeWork Customer Manager**

Single point of contact from EazeWork, person who is responsible for addressing technical and application usage related issues.

Edit

The option through which records can be edited and changes can be made.

Email Alerts

Alerts which come to users in their emails. These are used to inform of activities which are pending or completed.

Employee Calendar

A type of Calendar which is applied to an employee.

Eligibility Criteria

Criteria which makes a group of employees eligible for leaves.

Exception Approver

Approver used for approving leaves which are beyond the available amount.

Expense Head

A category used to combine similar expenses together.

Expense Subhead

A sub-category which identifies the type of expenditure accurately.

Employee On boarding

The process through which an employee record is created, information is filled up and the access is provided to an employee to use the system.

Employee Status

Helps in identifying if the employee is on long leave, has resigned, is on probation etc.

Employee Type

Helps in identifying if the employee is regular full time or subcontractor.

Employee Code

Unique code to identify the employee in the system. This can be manually assigned or system defined.

Employee Detail Management

Process through which the official details of the employee is updated.

Expense Claim / Expense Request

A request for claiming expense reimbursement from the company.

Expense Summary

Summary of the Expense Claim / Expense Request.

Effective Date

Date from which the record or transaction becomes effective.

F**Force Login**

If the session does not close properly or if the user tries to login from another terminal which his first session is still active he gets an option to Force Login. This terminated the first session without saving the in process work and should be used carefully.

Future Leave

Leaves which have been requested and approved but have not yet been taken.

G

General Setup

Setup which is common to various modules and applies to the overall application.

H

Holiday

Non working day defined as a holiday in the calendar.

Holiday Counted

If this is set as yes then any holidays which fall inside a leave are counted as leaves.

Half Day

A leave which spans half a day and the employee works for the remaining half.

I

Identity Document

Documents which are authentic and are used to establish the ID.

Initiator

User who creates the request by starting the workflow.

In-time

Marking of time as start of working.

J

K

L

Lapsed Leaves

Leaves which are not available as they have been not been taken or taken forward to next year.

Leaves

Holidays which an employee requests and gets against his accrued or future accrued leaves.

Leave Basis

Basis on which leaves are calculated.

Leave Balance

Net position of leaves for an employee as on a particular date.

Leave Category

There are four categories of leaves – these are pre defined. [Click here](#) for more information.

Leave Encashment

Conversion of a leave into cash which is paid as per company norms.

Leave History

History of leave requests, approvals, cancellations.

Leave Initialization

Giving a leave value to ensure that the leaves which are due to an employee are properly transferred to the system.

Leave Request

A request to take a leave.

Leave Status

Status of a leave request highlighting which part of the process it is at.

Leave Summary

Summary status of all leaves giving in one table all the important details.

Leave Type

Various types of Leaves can be created by the Application Administrator. [Click here](#) for more information.

Leave Withdrawal

A leave request once submitted can be withdrawn through this process. This works for both in process and approved requests.

Leave Without Pay

A leave category which is pre-defined and is used if an employee takes a leave without informing. This leave directly impacts the salary and is integrated with Payroll.

Levels

Seniority levels which indicate the hierarchy in the organization.

Location Calendar

Calendar which is linked to an office location.

Location Transfer

Transfer of employee from one office to another.

M**Manager**

Manager is the immediate superior to which the employee is reporting. In the application a lot of activities like approvals and some requests are created / approved by the manager. Every employee except the CEO has a manager assigned in the application.

Manager Transfer

Transfer of employee from one manager to another manager.

Mark Attendance

The process of marking attendance in the system.

Master Data

Data which is created by the Application Administrator and not changed frequently.

Mouse-over Command

Command which are available to the users on the screen through the mouseover action.

Modify Leave

The process through which the approver can modify the leave request.

N**O****Offices**

Physical office locations from where the company operates.

Official Details

Details of employees which are filled by the HR Manager. These are visible to only his manager.

Office Manager

A role given to the person who manages the assets and allocation for the company.

On Long Leave

A status which indicates an employee who is not coming to office as he is on a fairly long leave.

On Probation

A status which indicates that the employee is not yet confirmed and still on probation.

Organizational Structure

Reporting structure for the organization.

Out-Time

Time recorded in the clock at the end of day before leaving office.

Over Time

Time worked extra beyond the stipulated hours as per company policy.

P**Pending Requests**

Requests which are pending for approval.

Per Annum

Once in the year.

Per Month

Once in the month.

Per Incidence (Leave Basis)

This is the basis of on which leave is given to the Employee. It defines the period or instance on which leave is given.

Per Incidence (Leave Accrual)

In this method the leaves are credited on approval, i.e. whenever the leave is approved the leaves which are approved get credited to Employees leave account, used when Leave Basis is also Per Incidence..

Project Codes

Project codes are used to manage work on any internal or external requirements which can uniquely identified and grouped together as a project.

Pro Rata (Leave Accrual)

In this method of leave accrual leave is credited to employee account on a daily basis in the fraction it becomes due.

Q

R

Roles

The application workflow and access is controlled on the basis of roles. Roles are assigned by Application Administrator and can be seen in Preferences tab.

Request Initiator

User who can create a request.

Resigned

Employee who has resigned from the company.

Reportees

Employees who are reporting to a manager are also called his reportees.

Restricted Holiday

Holiday which is to be taken as a leave based on the calendar setting. These are used for regional and religious holidays.

Rejected

A request when rejected cannot be resubmitted.

Returned

A request when returned can be resubmitted.

Resubmitted

A request status indicating resubmission.

S

Save As Draft

An action which allows the users to save their work as a draft.

Setup

Section of application accessible only to Application Administrator.

System Generated Code

A code which is automatically assigned by the application.

Shifts

The working hours during which the employee is supposed to be working.

Shift Assignments

Assignment of a shift to an employee.

Serving Notice Period

Status of an employee who is still working in the company but has resigned and hence is serving his notice period.

T

Time Sheet

A document which captures the hours spent by employees on a weekly or monthly basis across various activities.

Team Details

Details of the team which is reporting to a manager which are presented in a table.

Team Leave Calendar

Calendar highlighting the working status of team, it helps the manager in reviewing the attendance and leave status.

Text Box

An area to enter text on a form.

Transfer Withdrawal

Request to withdraw a transfer which can be created as long as the transfer is still in process.

Total Working days

Total number of days an employee has worked. This excludes leaves and holidays.

Total Days Employed

Total number of days an employee has been employed, this includes leaves and holidays.

Time Clock Modification

A request which allows the employee to ask for a change in the time which has been recorded through the Attendance Control button.

Timestamp

Time entry which is automatically taken when the user clicks on the Attendance Control.

U

Unbilled

Category of Charge Codes which are not billable to customers.

Undertime

Similar to Overtime – difference being that this is the shortfall in time over a period measured against the standard working hours.

V

Verification

The process through which Accountant verifies the expense claim against the supporting documents and paper based documents.

Verified Amount

Amount which is verified and entered by the Accountant.

W

Widgets

Widgets are components which are available on the dashboard. It gives the user the option to remove or retain on the dashboard hence optimizing space.

X

Y

Z

End of Document