SysMates Technologies

Strategic Solutions for Organizations

HRMates Employee Administration

High level User Manual

Version 2.1

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Employee Administration Home

Workforce menu > Administration menu

New Employee

Create New Employee from Workforce menu > Administration menu > New Employee button

Upload New Employee Data from Workforce menu > Administration menu > Download template, Upload new Employees data buttons

From Hiring Process Workforce menu > Administration menu > Candidate Offered grid > Candidate Join button

By Support Team: Employment and Profile fields to be captured at New Employee

Rejoin

Change Employee status from Ex-Employee using Workforce > Administration > Search Employee > Select > Profile > Employment > Employee Status grid. Leave balances will reset

Staff Id

By Support Team: Setup automatic or manual staff id assignment, Saff Id change on employment change, rejoin

Staff id Alias like Employee Code

Note: By default new employee is disabled

Enable Employee

Under <u>Workforce</u> menu > <u>Administration</u> menu > <u>Search Employee</u> > <u>Select</u> checkbox > <u>Enable Employee</u> button

In Enable Employee following 3 options available:

- Disable Employee

  If Employee is Disable, then employee can't access the portal

- Enable Employee

  Enable employee only Enable the employee it does not send any Email

- Enable and Send Email

  It is to Enable Employee by sending Welcome mail with Username and Password.

Personal Profile

Workforce menu > Administration menu > Search Employee field> Select checkbox > Profile button

Below are the details that is maintained in Personal Profile:

- Mobile Number
- Identity Details
- Emergency Contacts
- Family Details
- Address:
  - Present Address
  - Permanent Address
- Academics
- Organisation (Past Employment)
- Languages
- Certifications
- References
- Social Profile
- Custom Fields
- Customized grid from Classification

Profile Validation

Support team can setup required elements and minimum number of grid items. For example at least 2 Family members.

Profile Approval Process

Support team can setup approval process for profiles of new employee and changes in profiles.

Manage Profile Data

Manual: Workforce menu > Administration menu > Search Employee field > Select checkbox > Profile button

Upload: Workforce menu > Administration menu > Upload Employee data button

Upload Photos: Workforce menu > Administration menu > Upload Photos button

Employment Profile

Masters

Workforce menu > Administration menu > Employment menu

Location, Designations, Grades, Custom fields and grids, Org Structure, Reporting, Cost Centres, Document Types

Manage Profile Data

Manual: Workforce menu > Administration menu > Search Employee field > Select checkbox > Profile button > Employment Tab

Upload: Workforce menu > Administration menu > Upload Employee data button

Upload Employee Documents: Workforce > Administration > Upload Documents

Employment Details

- Official Email
- Date of Birth
- Name
- Notice Period
- Status
  - Trainee
  - Probation
  - Probation Extended
  - Termination
  - Absconding
  - Bereavement
  - Retirement
    - Resigning
    - Ex-Employee
- Category
- Designation
- Grade
- Reporting
- Bank Account, Tax, Fund Number
- Documents
- Location
- Cost Centre
- Org Structure
- Deputation
- Old Staff Id
- Suspension
- Disciplinary Action
- Shifts
- Attendance Flags
- Assets
- Clients
- HR Coordinators
- Login As
- HOD
- Custom Fields
- Customized grid from Classification

Lifecycle management

Notification to HR before status change due date. Probation, Trainee, Contract, PIP, Absconding, Retirement

Workforce menu > Administration menu > Search Employee field > Select checkbox > Profile button > Employment menu > Status grid

Permissions

Workforce menu > Settings menu > Permissions menu

Add permissions for managers like Employee Admin, Payroll admin, Reports, Analytics

Letters

Letters Templates

Editor, Data Fields, Signatory

Letter Generation

Manual Generation, Auto Generation for Lifecycle Change, Performance and more

Letter Acceptance

Signature Pad Sign, Download Print Sign and Upload, Online Accept

Letter History

In Employment Page

Responsibility

View, Transfer, Remove responsibilities assigned to employees via employment, permissions, workflows.

Exits

Maintain notice periods

Direct Exit

using <u>Workforce</u> menu > <u>Administration</u> menu > <u>Search Employee</u> field > <u>Make Ex-Employee</u> button

Involves Full and Final

Voluntary Exit Process

Involves Resignation Request (shortfall, try to retain, allow rejoin) and approval, , No Dues, Feedback, Handover and Full and Final. Support team will help setup the process
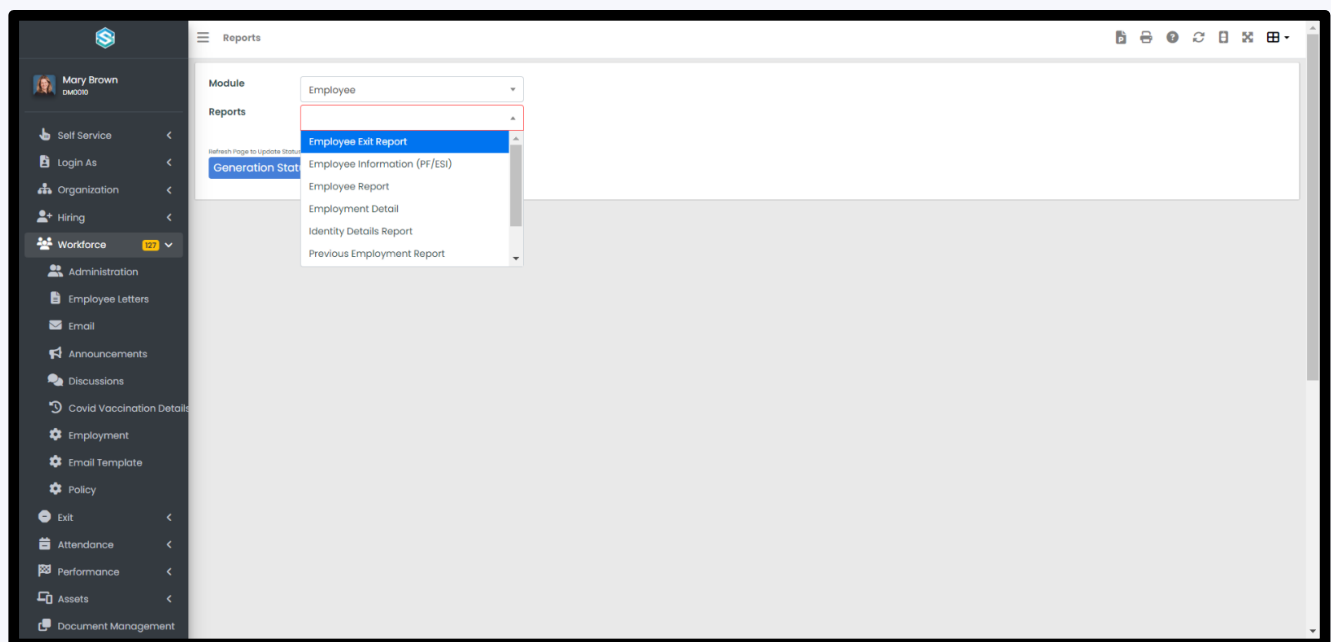
Involuntary Exit Process

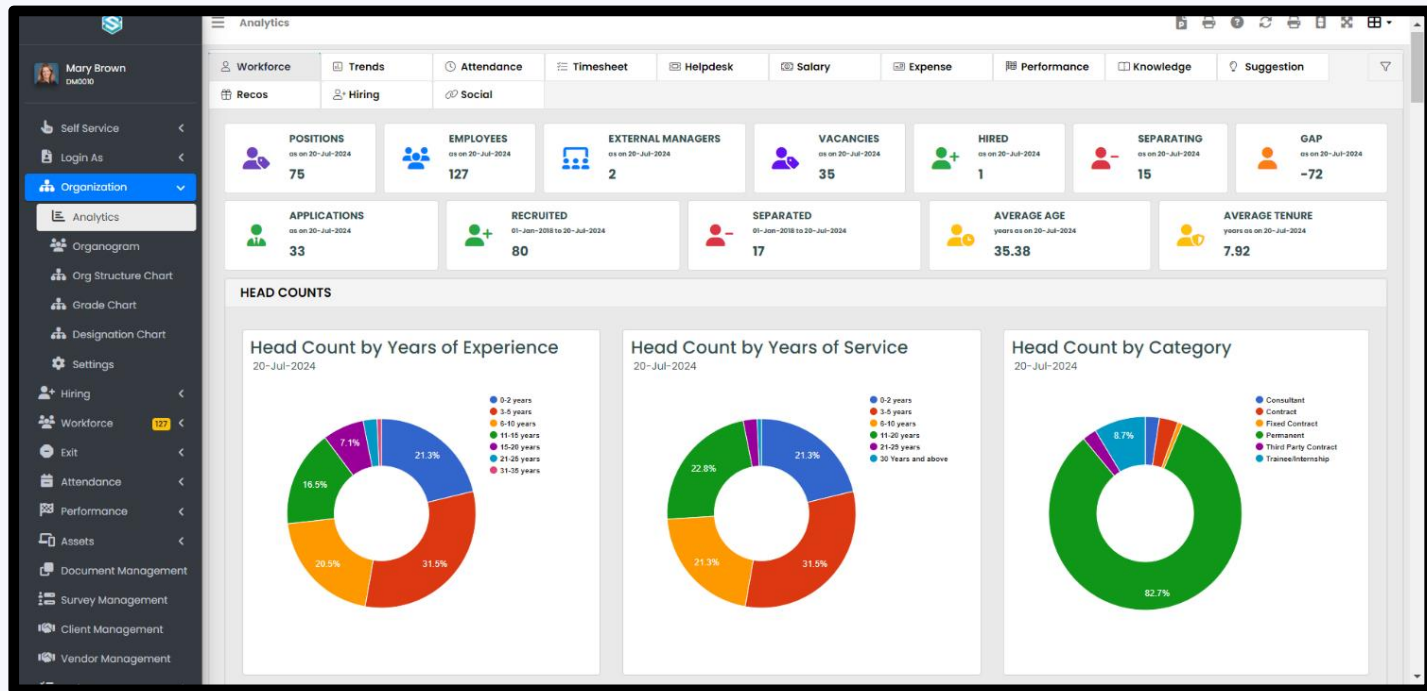Auto Exit process on Retirement

Reports

Using Reports menu item
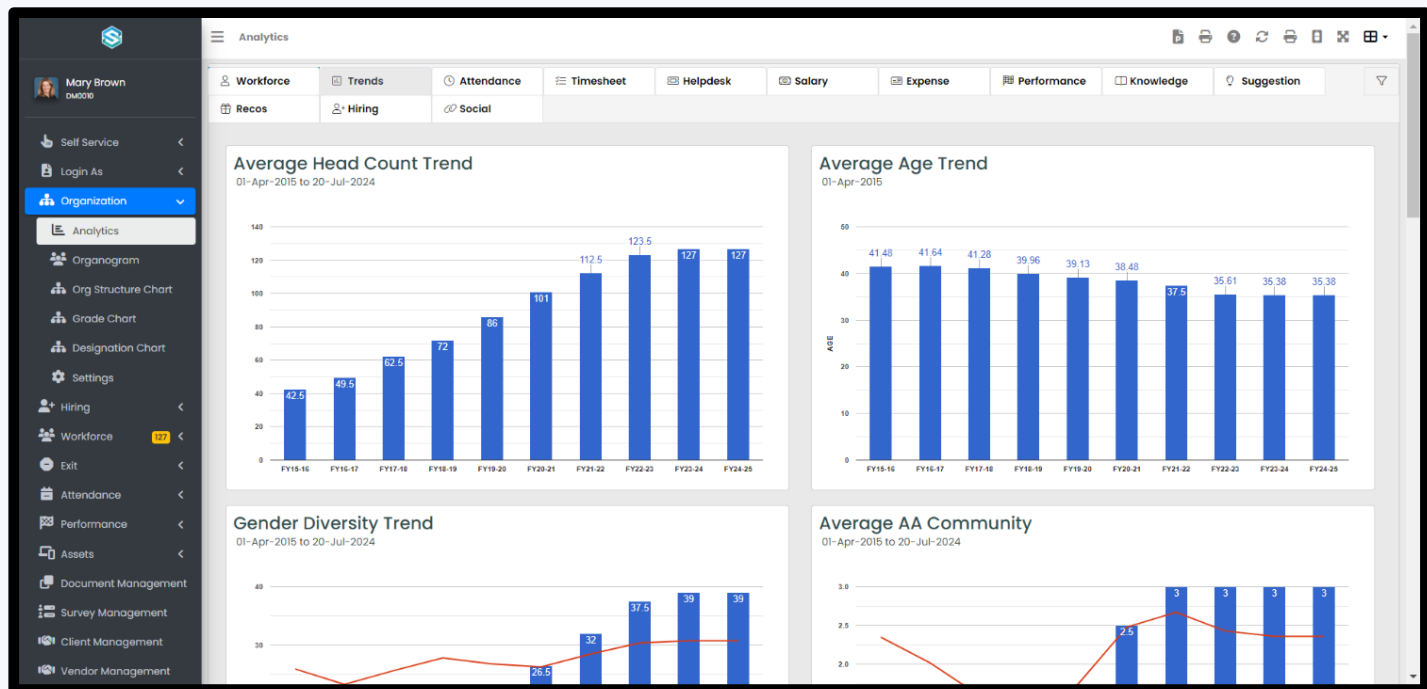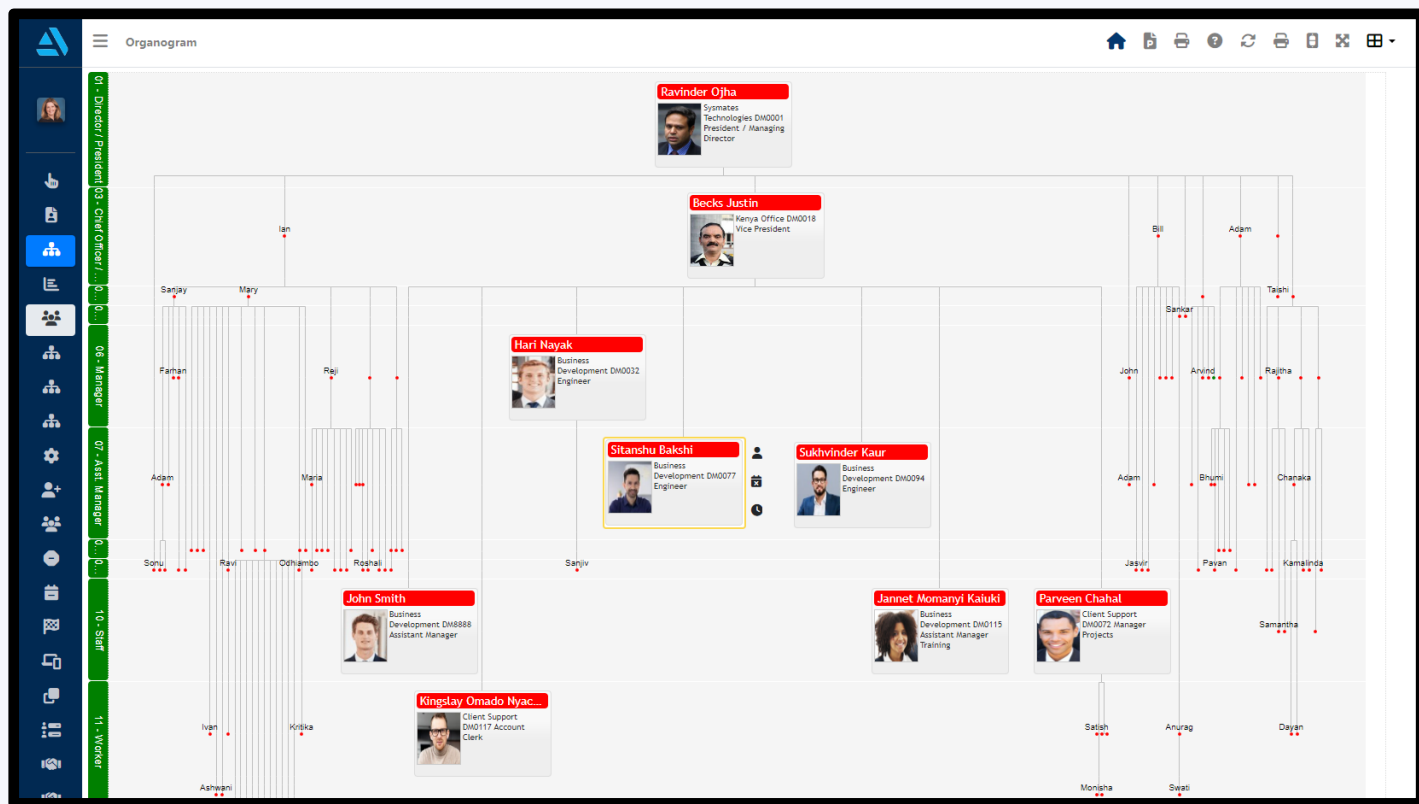
Multiple reports are available

Analytics

Organization menu > Analytics menu > Workforce menu

Organization menu > Analytics menu > Trends menu

Organization menu > Analytics menu > Organogram menu

Organization menu > Analytics menu > Org Structure menu

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