



SysMates Technologies

Strategic Solutions for Organizations



HRMates Employee Administration

High level User Manual

Version 2.1

Date: 26th July 2024

Employee Administration Home

Workforce menu > Administration menu

Employee Administration

Search ☐ Only Ex-Employees

All 127 **Profiles Incomplete** 12 **No Photo** 1 **Exiting** 15 **Disabled** 1

Dev Links: EmployeeCounts skin to code

Employees [New Employee](#) [Make Ex Employee](#) [Profile](#) [Leave](#) [Attendance](#) [Kiosk login test](#) [Print Profile](#) [Responsibility](#) [Switch User](#) [Profile Editing](#) [Enable Employees](#) [Photos](#) [Employee Dossier](#)

	Name	Date of Joining	Separation Dates	Status	Category	Department	Designation	Location
<input type="checkbox"/>	DM0167 Addison Jerami RM: Anuj Barwal DM0085	03-Jan-2022	Resignation Date: 07-Mar-2022	Resigned	Permanent	Company: Sysmates Technologies Division: HRMates Department: Bangladesh Office Section: Business Development	Engineer	Madison
<input type="checkbox"/>	DM0172 Asha Kumari RM: Ravi Gupta DM0007	12-Jul-2021	Resignation Date: 08-Apr-2022	Resigned	Permanent	Company: Sysmates Technologies Division: HRMates Department: Shared Services Section: Human Resources	Executive - Human Resources	Gurgaon
<input type="checkbox"/>	DM0026 Gajendra Chand RM: Mary Brown DM0010	01-Jul-2016	Retirement Date: 01-Apr-2020	Retiring	Permanent	Company: Sysmates Technologies Division: HRMates Department: Shared Services Section: Human Resources Sub Section: HR Operations	Manager - HR	Madison
<input type="checkbox"/>	DM0159 Kamal Rajput RM: Sumita Kumari DM0074	13-Dec-2021	Resignation Date: 26-Feb-2022	Resigned	Permanent	Company: Sysmates Technologies Division: HRMates Department: Shared Services Section: Finance & Accounts	Executive - Finance	Gurgaon
<input type="checkbox"/>	DM0170 Kavita Iyer RM: Sumita Kumari DM0074	13-Dec-2021	Resignation Date: 11-Apr-2022	Resigned	Permanent	Company: Sysmates Technologies Division: HRMates Department: Shared Services Section: Finance & Accounts	Manager - Finance	Madison
<input type="checkbox"/>	DM0021 Lalit Bhatti RM: Raj Thomas DM0033	10-Mar-2016		Bereavement	Permanent	Company: Sysmates Technologies Division: HRMates Department: Shared Services Section: Finance & Accounts	Software Engineer	Gurgaon
<input type="checkbox"/>	DM0024 Nithin Daniel Sathya RM: Mary Brown DM0010	14-Sep-2016	Absconding Date: 01-Oct-2021	Absconding	Permanent	Company: Sysmates Technologies Division: HRMates Department: Shared Services Section: Human Resources Sub Section: HR Operations	Manager - HR	Gurgaon
<input type="checkbox"/>	DM0013 Pankaj Kumar Gupta RM: Raj Thomas DM0033	16-Mar-2011	Termination Date: 10-Oct-2021	Terminated	Permanent	Company: Sysmates Technologies Division: HRMates Department: Shared Services Section: Finance & Accounts	Software Engineer	Madison
<input type="checkbox"/>	DM0037 Prachi Singh RM: Raj Thomas DM0033	20-Sep-2017		Voluntary Retirement	Permanent	Company: Sysmates Technologies Division: HRMates	Software Engineer	Madison

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, Staff Id change on employment change, rejoin

Staff id Alias like Employee Code

Note: By default new employee is disabled

The screenshot displays the HRMates Employee Administration interface. On the left is a sidebar menu with options like Self Service, Login As, Organization, Hiring, Workforce (selected), Administration, Employee Letters, Email, Announcements, Discussions, Covid Vaccination Details, Employment, Email Template, Policy, Exit, Attendance, Performance, Assets, and Document Management. The main area is titled 'Employee Administration' and contains a search bar, a 'New Employee' button (highlighted with a red box), and a 'Candidates Offered' table. The 'New Employee' form is open, showing 'Personal' and 'Employment' sections. The 'Personal' section includes fields for Title, Gender, Employee Code, First Name, Middle Name, Last Name, Mobile Number, Corporate Email, Personal Email, and Date of Birth. The 'Employment' section includes fields for Date of Joining, Status, Category, Designation, Grade, Cost Centre, Location, Reporting to, Company, Notice Period, and Notice Period Count. A 'SAVE' button is at the bottom right of the form. In the background, another window shows 'Profile Editing' options like Enable Employees, Photos, Skill Inventory, and a 'Candidate Join' button.

Enable Employee

Under Workforce menu > Administration menu > Search Employee > Select checkbox > Enable Employee 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.

The screenshot displays the HRMates Employee Administration interface. On the left is a sidebar menu with options like Self Service, Login As, Organization, Hiring, Workforce (127), Administration, Employee Letters, Email, Announcements, Discussions, Covid Vaccination Details, Employment, Email Template, Policy, Exit, Attendance, Performance, Assets, and Document Management. The main area is titled 'Employee Administration' and shows a search bar for 'Mary'. Below the search bar are tabs for 'Employees' and 'Only Ex-Employees'. The 'Employees' tab is active, showing a table of employees. The 'Enable Employees' button is highlighted with a red box. A modal dialog box titled 'Enable Employees' is open, showing three options: 'Enable and Send Email', 'Only Enable' (selected), and 'Disable'. The dialog also contains a 'Save' button and a 'Candidate Join' button. Below the dialog, there is a table for 'Candidates Offered' and a table for 'Bounced Emails'.

Name	Date of Joining	Status	Category	Department	Designation	Location
Mary Brown	01-Jan-2017	Current	Permanent	Company: Symantec Technologies Division: HRMates Department: Shared Services Section: Human Resources	Vice President Workforce Management	Bengaluru

Photo	Name	Date of Joining
	Priya	08-Sep-2022

Email	Block Till
abc@gmail.com	25-Jul-2024 07:10

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
 - Present Address
 - Permanent Address
- Identity Details
- Emergency Contacts
- Family Details
- 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.

The screenshot displays the HRMate Employee Administration web application. The left sidebar contains navigation options: Self Service, Login As, Organization, Hiring, Workforce (selected), Administration, Employee Letters, Email, Announcements, Discussions, Covid Vaccination Details, Employment, Email Template, Policy, Exit, Attendance, Performance, Assets, and Document Management. The main content area is titled 'Employee Administration' and shows a search bar for 'Mary'. Below the search bar, there are tabs for 'Employees' and 'Candidates Offered'. The 'Employees' tab is active, and the 'Responsibility' sub-tab is highlighted with a red box. The 'Employee Responsibilities' modal is open, showing details for employee Mary Brown (DM0010). The modal includes an 'Employee Detail' section with fields for Staff Id, Employee Name, Designation, Department, and Supervisors Name. Below this is a 'Responsibilities' table with columns for Responsibility, Notification With, and Managed By. The table lists various responsibilities such as Direct / Functional Reporting, Permission, and Analytics, each with a list of associated employees and their IDs. The 'Managed By' column lists the supervisor for each responsibility.

Responsibility	Notification With	Managed By
Direct / Functional Reporting	=>Adam Levine DM0075 =>Adamko Steve HM0003 =>Ashwani Chauhan DM0139 =>Gajendra Chand DM0026 =>Himanshu Bauri DM0052 =>Ivan Morgan DM0038 =>Nishajeei Raui DM0091 =>Nithin Daniel Sathya DM0024 =>Pratham Awasthi DM0175 =>Ravi Gupta DM0007 =>Rohit Shankar DM0079 =>Vivek Mittal DM0014	Ravinder Ojha DM0001, Mary Brown DM0010, Ravi Gupta DM0007, John David Ohina KN0001, John David Ohina KN0001, Rohitha Gunasinghe DM0141, Taihi Nishida DM0157, Rohitha Gunasinghe DM0141, Adamko Steve HM0003
Permission	=>Analytics =>Announcements =>Attendance Report =>Attendance Report By Presence =>Attendance Report by Presence - Print =>Attendance Report by Time =>Daily Activity Report	Ravinder Ojha DM0001, Mary Brown DM0010, John David Ohina KN0001, Rohitha Gunasinghe DM0141

Exits

Maintain notice periods

Direct Exit

using Workforce menu > Administration menu > Search Employee field > Make Ex-Employee 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

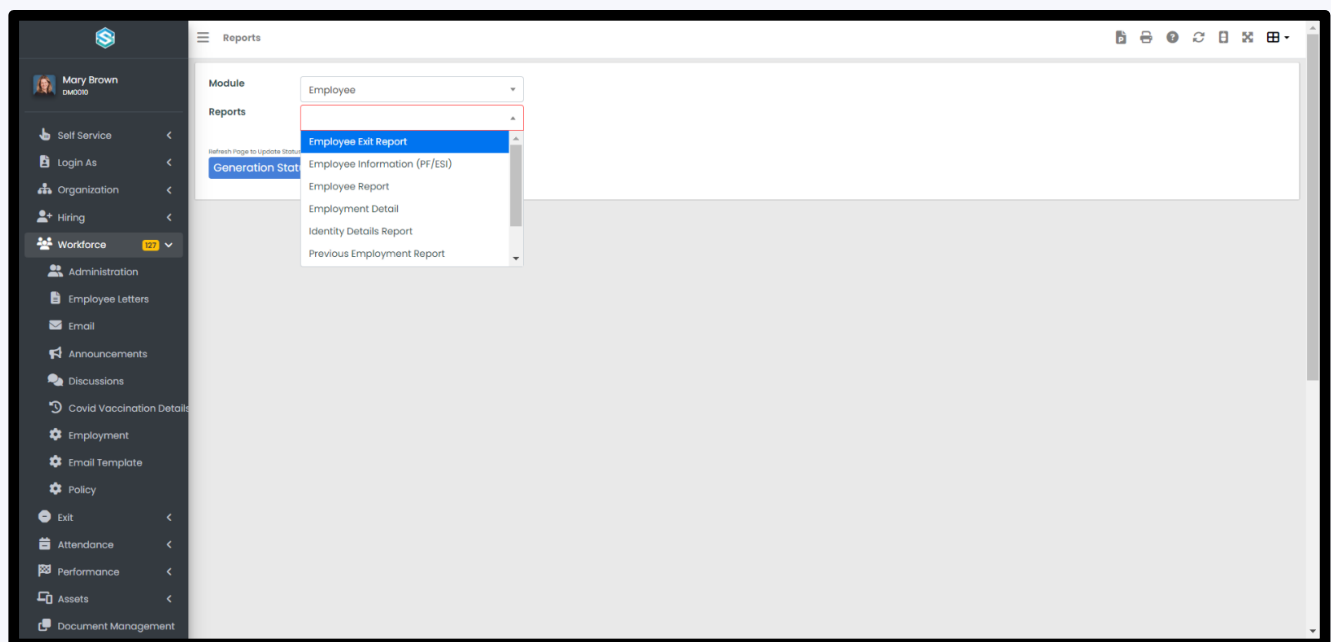
Involuntary Exit Process

Auto Exit process on Retirement

Reports

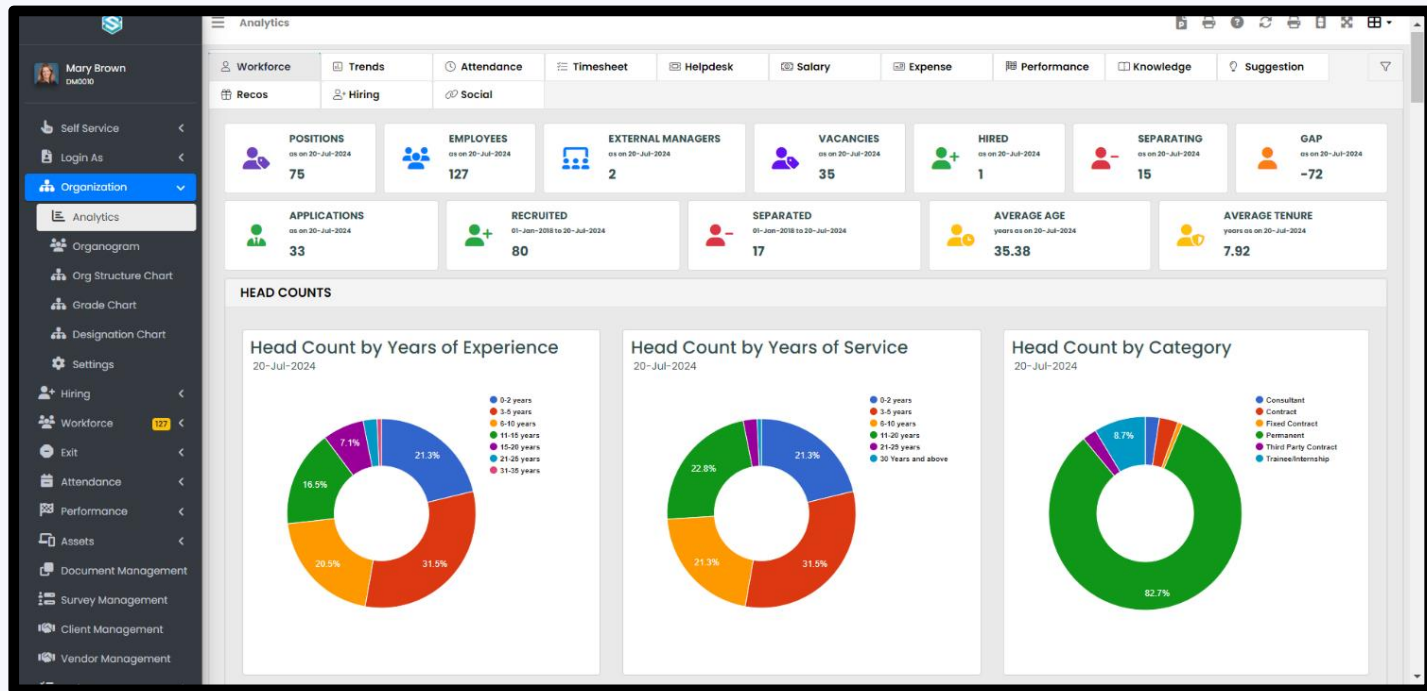
Using Reports menu item

Multiple reports are available

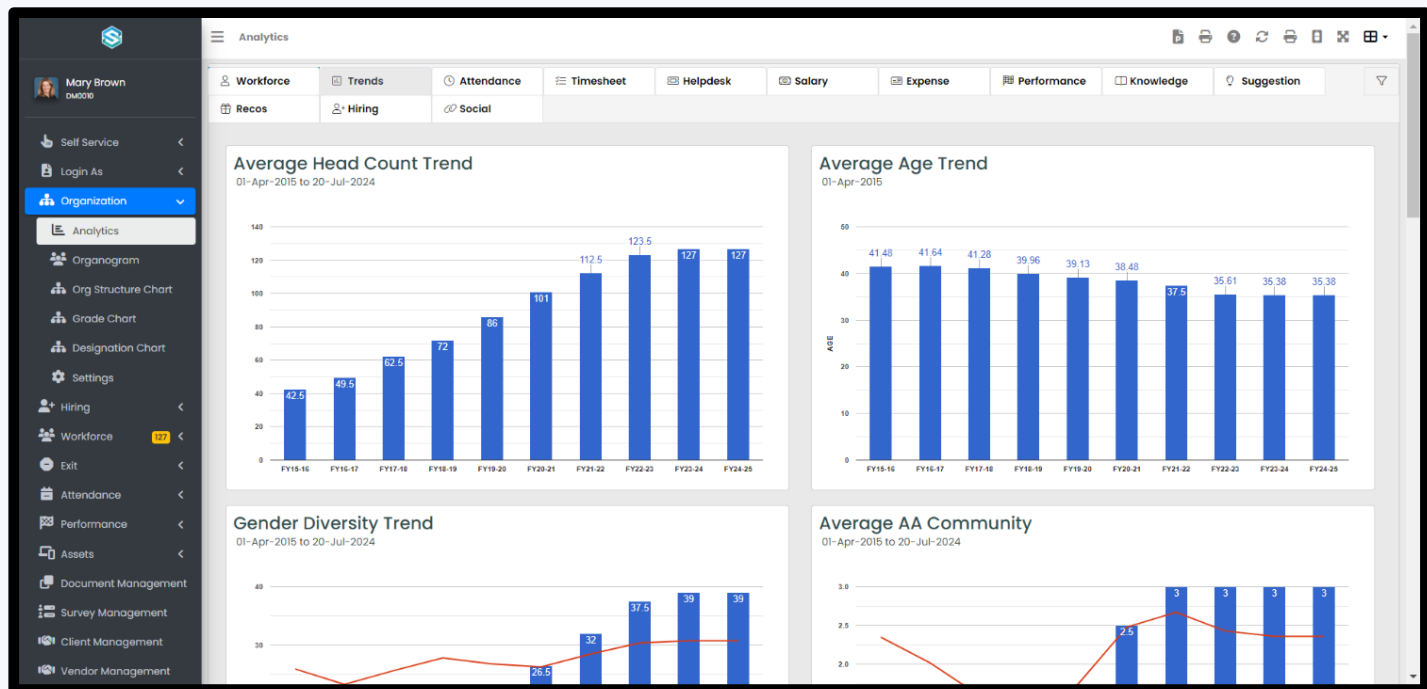


Analytics

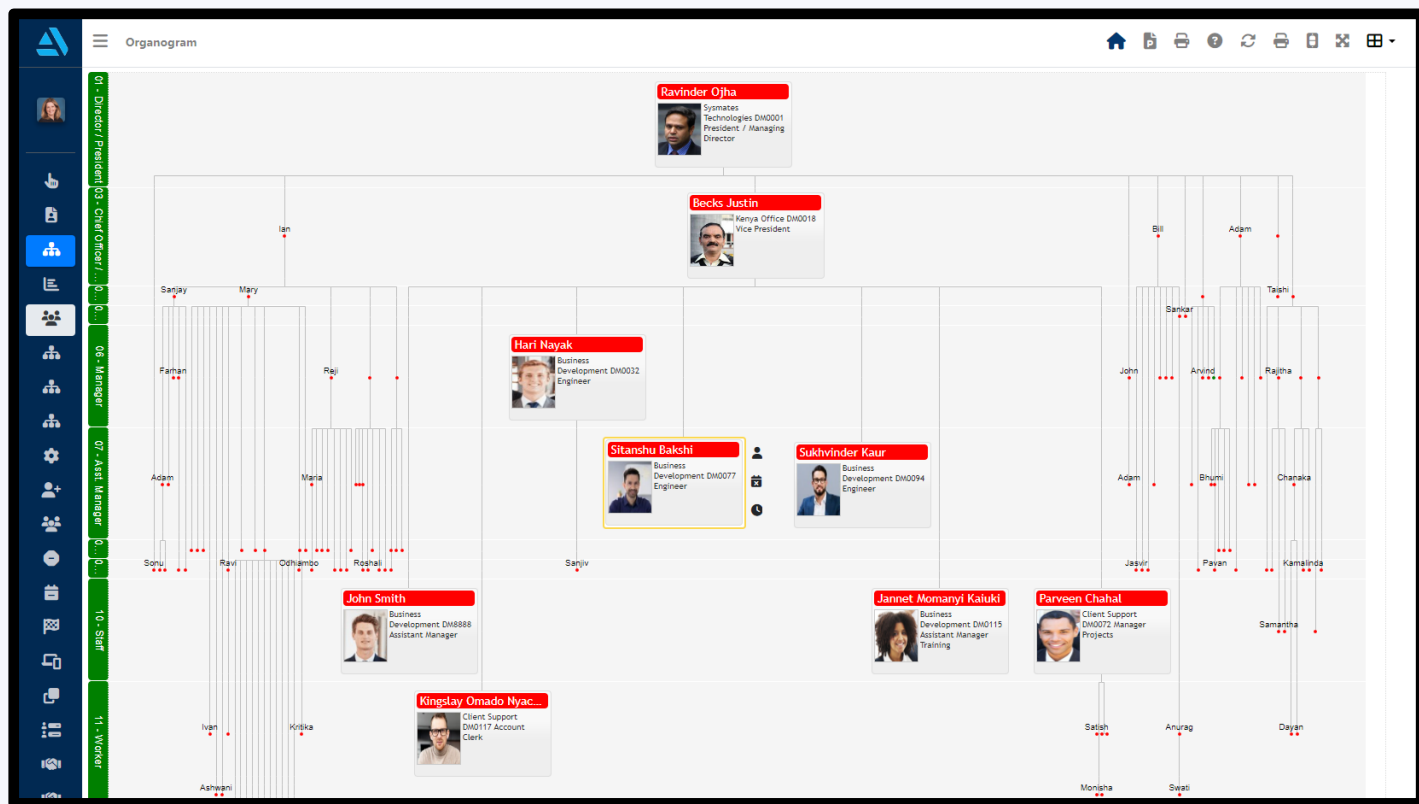
Organization menu > Analytics menu > Workforce menu



Organization menu > Analytics menu > Trends menu



Organization menu > Analytics menu > Organogram menu



Organization menu > Analytics menu > Org Structure menu

