



Sys Mates Technologies

Strategic Solutions for Organizations



HRMates Employee Administration

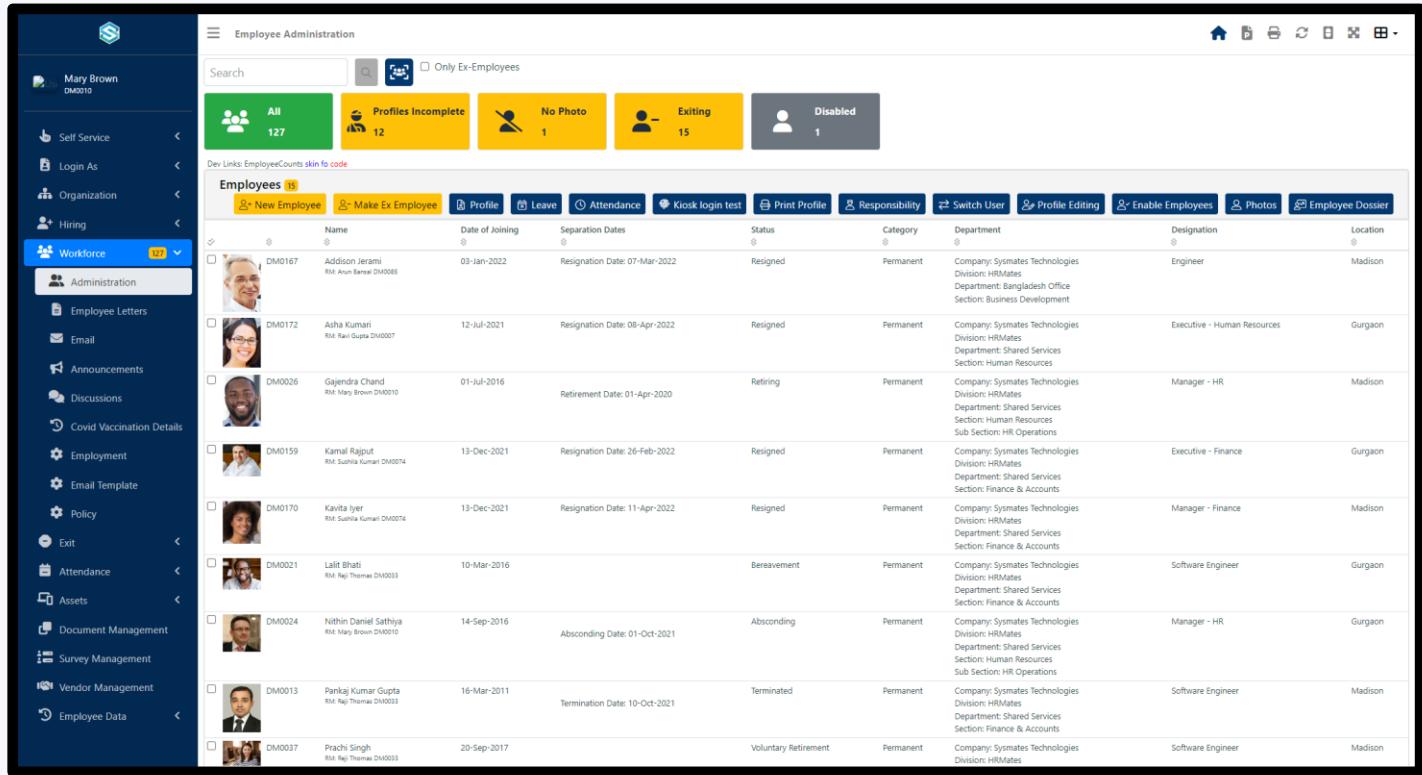
High level User Manual

Version 2.1

Date: 26th July 2024

Employee Administration Home

Workforce menu > Administration menu



The screenshot shows the Employee Administration Home page. The left sidebar is titled 'Workforce' and includes a 'Administration' section. The main content area is titled 'Employee Administration' and features a search bar and a filter 'Only Ex-Employees'. Below these are four buttons: 'All' (127), 'Profiles Incomplete' (12), 'No Photo' (1), 'Exiting' (15), and 'Disabled' (1). A table titled 'Employees' lists 15 employees with columns for Name, Date of Joining, Separation Dates, Status, Category, Department, Designation, and Location. Each employee entry includes a small photo, an ID, and a resignation/termination date. The table also shows departmental details like Company: Sysmates Technologies, Division: HRMates, Department: Shared Services, Section: Human Resources, and Sub Section: HR Operations.

| Name | Date of Joining | Separation Dates | Status | Category | Department | Designation | Location |
|--|-----------------|-------------------------------|----------------------|-----------|--|-----------------------------|----------|
| DM0167 Addison Jerami RM. Arun Bens DM0085 | 09-Jan-2022 | Resignation Date: 07-Mar-2022 | Resigned | Permanent | Company: Sysmates Technologies Division: HRMates Department: Shared Services Section: Business Development | Engineer | Madison |
| DM0172 Asha Kumari RM. Ravi Gupta DM0007 | 12-Jul-2021 | Resignation Date: 06-Apr-2022 | Resigned | Permanent | Company: Sysmates Technologies Division: HRMates Department: Shared Services Section: Human Resources | Executive - Human Resources | Gurgaon |
| 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 |
| DM0159 Kamal Rajput RM. Sunila Kumar 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 |
| DM0170 Kavita Iyer RM. Sunila Kumar 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 |
| DM0021 Lalit Bhati RM. Raji Thomas DM0033 | 10-Mar-2016 | | Bereavement | Permanent | Company: Sysmates Technologies Division: HRMates Department: Shared Services Section: Finance & Accounts | Software Engineer | Gurgaon |
| DM0024 Nitin Daniel Sathija 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 |
| DM0013 Pankaj Kumar Gupta RM. Raji 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 |
| DM0037 Prachi Singh RM. Raji 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 shows the HRMates Employee Administration interface. On the left, the navigation menu is visible with 'Workforce' selected. The main area is titled 'Employee Administration' and shows a 'New Employee' form. 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, Cost Centre, Designation, Grade, Location, Reporting to, Company, and Notice Period. A 'Candidate Join' dialog is open on the right, showing fields for Designation, Location, and a 'Candidate Join' button. The 'Candidate' field is set to 'Priya' and the 'Location' field is set to 'Gurgaon'.

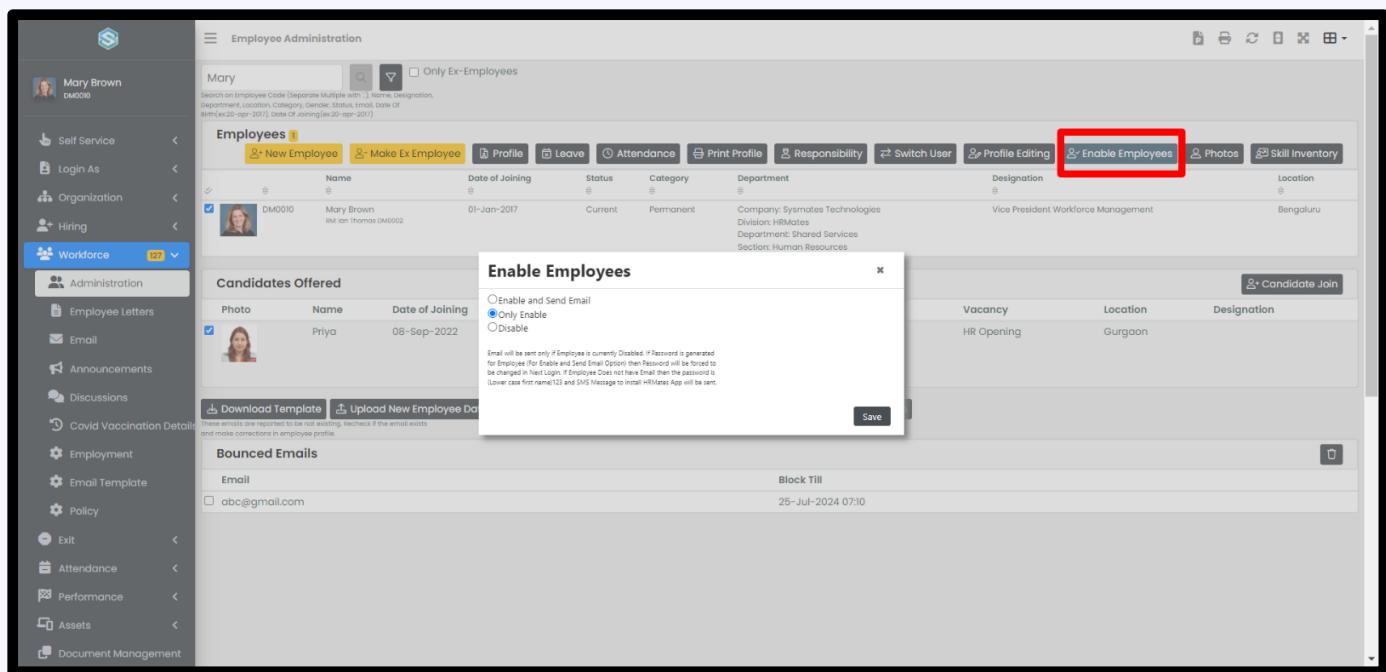
Enable Employee

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 shows the 'Employee Administration' screen. On the left, there is a sidebar with various menu items under 'Workforce' and 'Administration'. The main area displays a list of employees with columns for Name, Date of Joining, Status, Category, Department, Designation, and Location. A specific employee, Mary Brown (DM0010), is selected. A modal window titled 'Enable Employees' is open over the list. The modal contains three radio button options: 'Enable and Send Email' (unchecked), 'Only Enable' (checked), and 'Disable' (unchecked). Below these options is a note about password generation for the 'Enable and Send Email' option. At the bottom of the modal are 'Save' and 'Cancel' buttons. The 'Only Enable' option is highlighted with a red box.

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

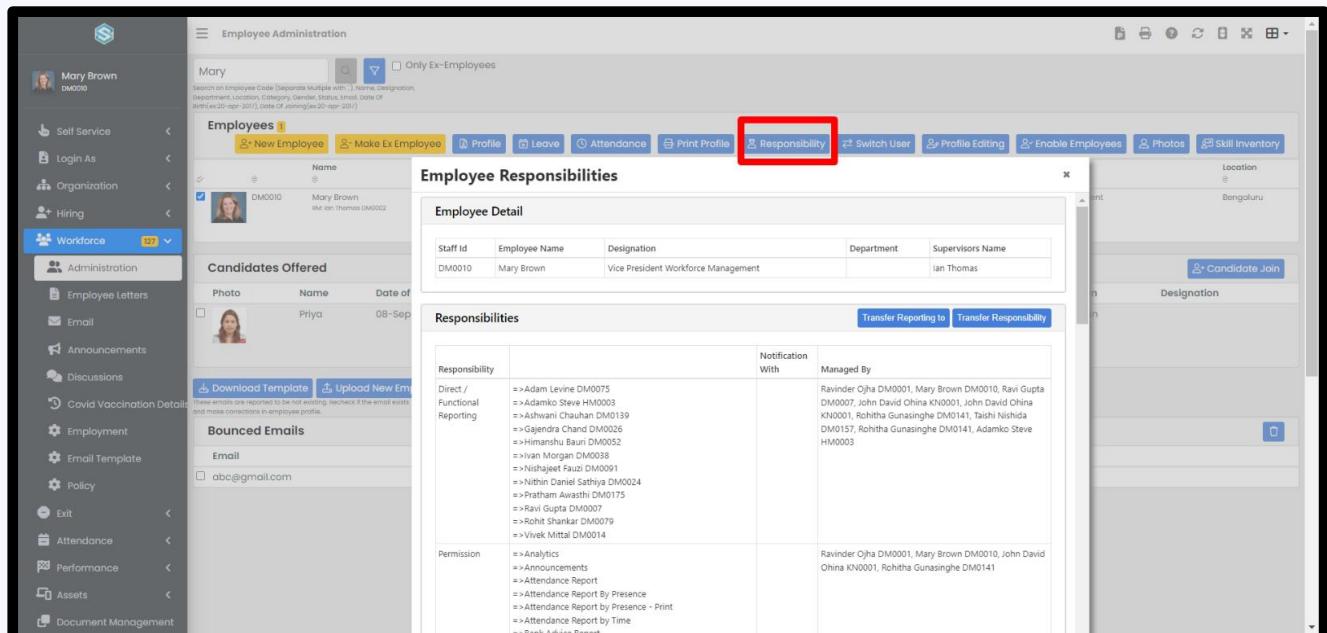
Signature Pad Sign, Download Print Sign and Upload, Online Accept

Letter History

In Employment Page

Responsibility

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



The screenshot shows the Employee Administration interface. The left sidebar has a 'Workforce' section with 'Administration' selected, showing 127 employees. The main content area is titled 'Employee Responsibilities'. It shows a list of responsibilities assigned to an employee named Mary Brown (Staff Id: DM0010). The responsibilities are categorized into 'Direct / Functional Reporting' and 'Permission'. The 'Direct / Functional Reporting' section lists several employees, and the 'Permission' section lists 'Analytics', 'Announcements', 'Attendance Report', 'Attendance Report By Presence', 'Attendance Report By Print', 'Attendance Report By Time', and 'Print Archive Report'. A red box highlights the 'Responsibility' tab in the top navigation bar.

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

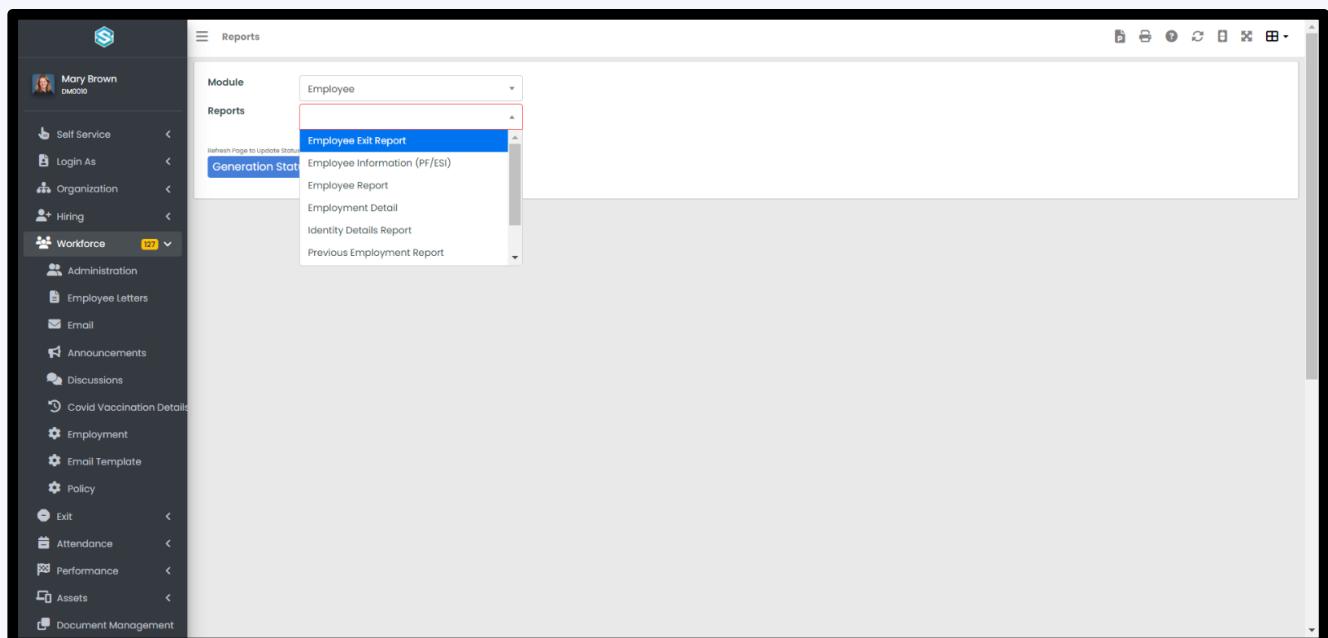
Involuntary Exit Process

Auto Exit process on Retirement

Reports

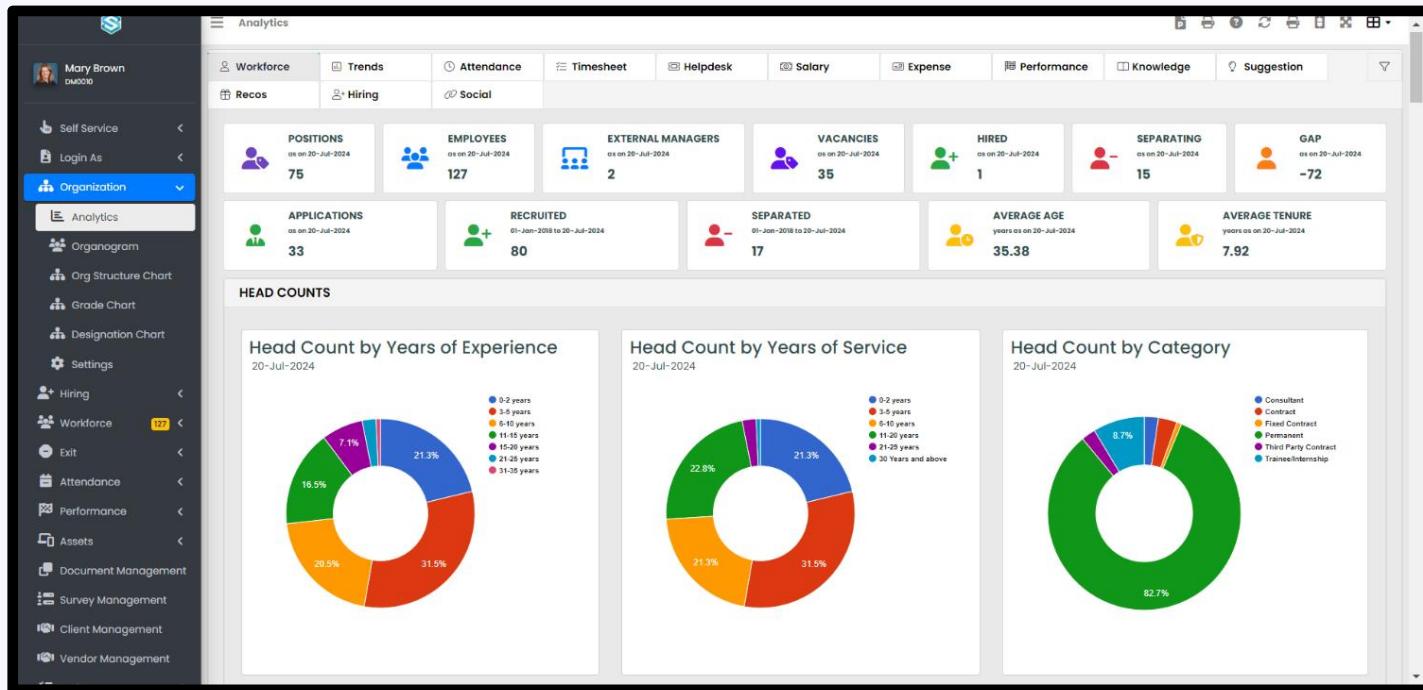
Using Reports menu item

Multiple reports are available

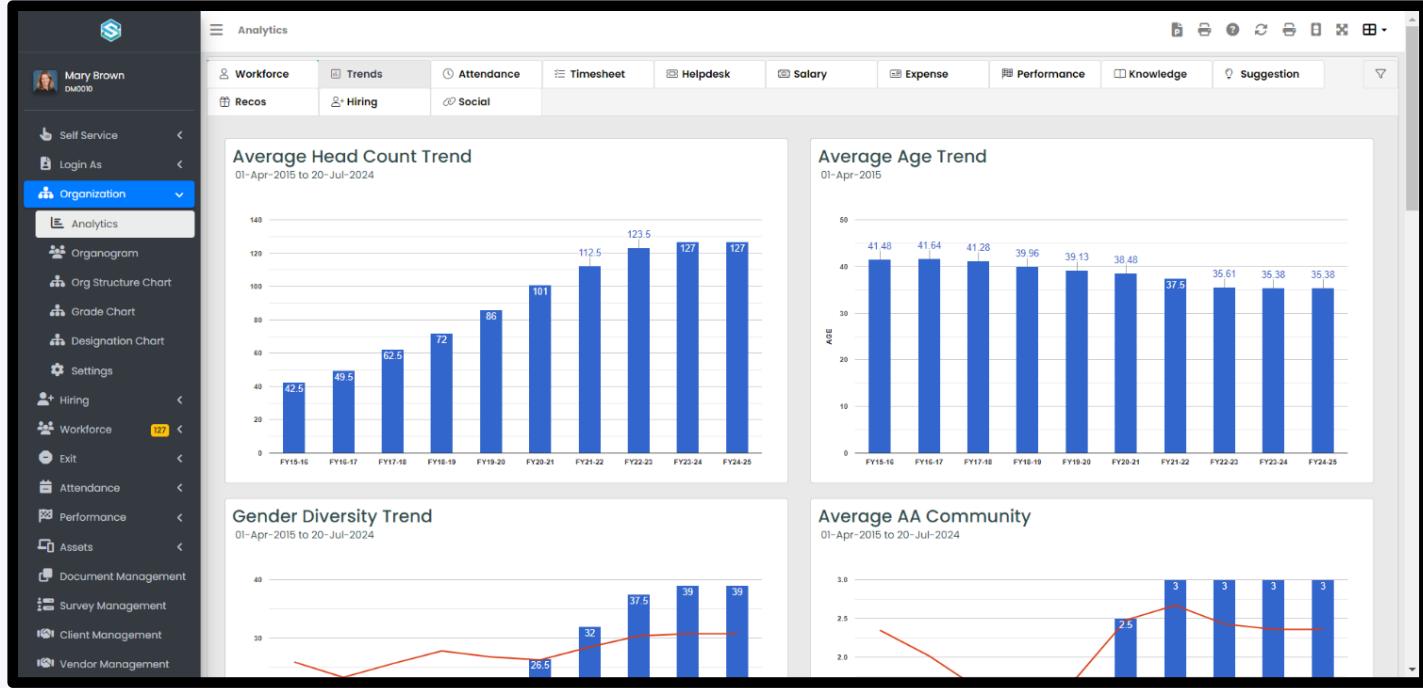


Analytics

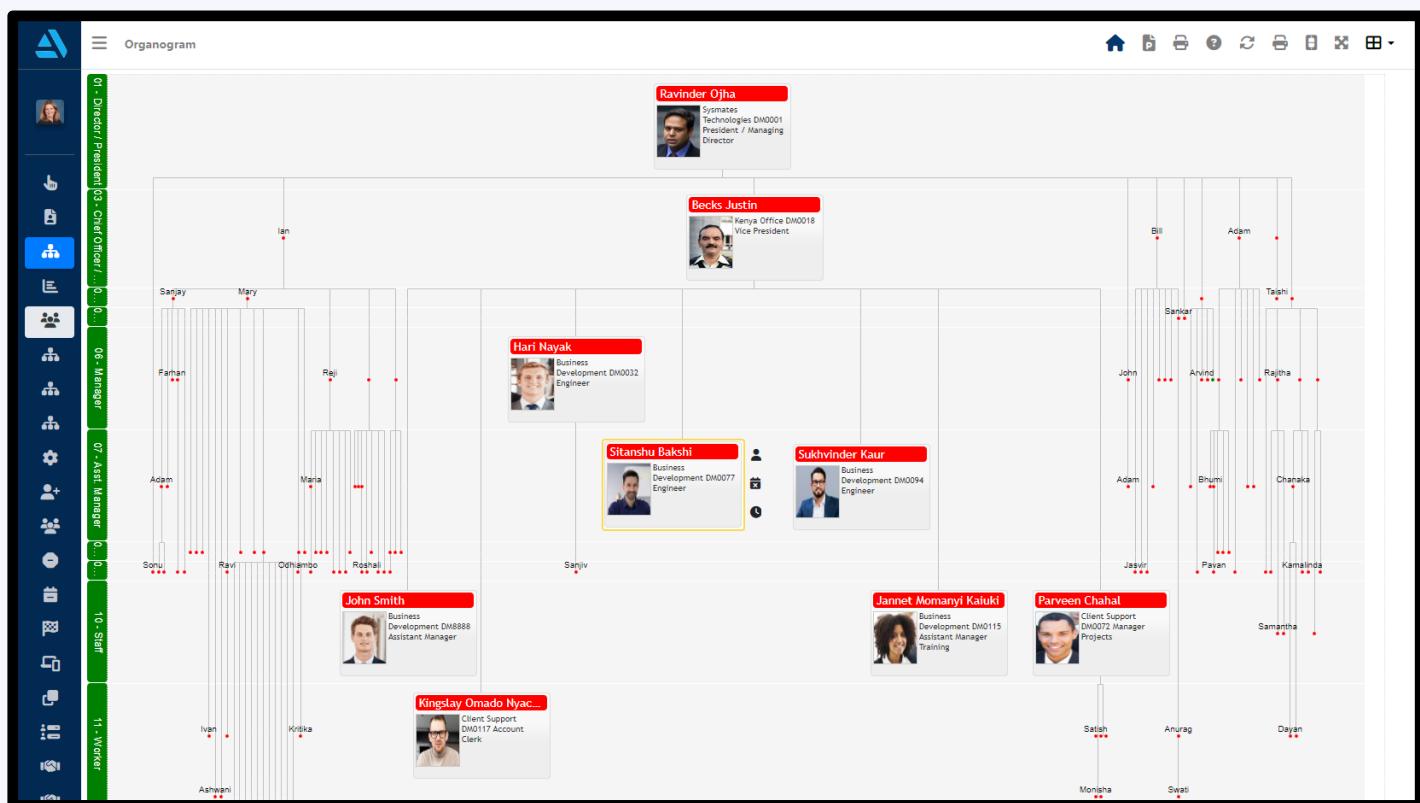
Organization menu > Analytics menu > Workforce menu



Organization menu > Analytics menu > Trends menu



Organization menu > Analytics menu > Organogram menu



Organization menu > Analytics menu > Org Structure menu

