



Sys Mates Technologies

Strategic Solutions for Organizations

Products Modules and Features

Version 2.1

Date: 19th June 2024



Feature Enabled for AI



≡ Analytics & Reports

Analytics	<ul style="list-style-type: none">• Live Analytics• As at any past Date• Filter by Gender, Category, Unit etc...• As per standard HR Metrics
Org Charts	<ul style="list-style-type: none">• Reporting Structure• As at any Past Date• Filter by Level, Reporting Type, Location etc...• View Profiles, Leave and Attendance of employees.• Same in Supervisor's Self-service as "My Team"
Organogram	<ul style="list-style-type: none">• Reporting Structure• Any Past Date
Reports	<ul style="list-style-type: none">• Full Coverage• Customizable• Filters• Permissions

⚙️ Settings and System

Companies	<ul style="list-style-type: none"> • Multiple Companies with logos, Address, logins and Statutory contributions • Group Level management • Cross Reporting
Sign on	<ul style="list-style-type: none"> • Password with strength checks • Single sign on using Azure, Google
Policies 	<ul style="list-style-type: none"> • Policy Groups • Employee based policies
Documents 	<ul style="list-style-type: none"> • Repository of commonly used documents. • Document Groups and view or edit rights
Quick Links	<ul style="list-style-type: none"> • Web Links to other portals • Deep Links to other portals with user info
Branding	<ul style="list-style-type: none"> • Logos and Brand images for background • Button and Background colours • Web and mobile branding
Reminders	<ul style="list-style-type: none"> • Daily Reminder for task after due date to selected employees • Escalation matrix • Complete completion form including file uploads • Mark Task as completed • Repeated Tasks daily, weekly, monthly, quarterly annual
Permissions	<ul style="list-style-type: none"> • Module wise Permission • Permissions filters with Locations, Departments, Custom Groups and more
Security	<ul style="list-style-type: none"> • Annual Third-Party Audits • AWS Secure Hosting with EC2 and S3
Disaster Recovery	<ul style="list-style-type: none"> • Offsite daily backups • Source code in GitHub private repositories
Technology	<ul style="list-style-type: none"> • Dotnet middle ware • Oracle MySQL database server

👤 + Hiring

Job Descriptions	<ul style="list-style-type: none"> • Repository of Job Descriptions
Vacancies Management	<ul style="list-style-type: none"> • Assign “Recruiter” from Permission • Manpower Request and Approval Process • Job Description, Professional Qualification, Salary bracket • From Budget or Out of Budget • Replacement vacancy • Location wise head counts with approval process • Publish via Agents, Website, Employee referrals, Job Boards, social media, QR Code and more • Tracking Applications, shortlisted, selected, hired, joined
Applicant Tracking	<ul style="list-style-type: none"> • Candidate or agents self-service portal to apply • Upload applications (received by emails etc...) • Applications tagged to source • Multi-Level Shortlisting • Resumes on Hold or eliminated • Search Resumes Database
Candidate Evaluation 	<ul style="list-style-type: none"> • Evaluation Process with rounds, panels, criteria's, written tests, ratings • Final Ratings and selection • Online tests using questions from question bank • Create Candidate evaluation templates specific to the organization • Interview scheduling
Pre-Boarding	<ul style="list-style-type: none"> • Document Collection Process • Offer Letter generation, approval and acceptance or rejection process • Joining Process



Workflow

Onboarding Process 	<ul style="list-style-type: none">• New Employee creation from UI or bulk Upload with optional approval process• Rejoining Process• Check for Terminated or do not Rejoin marked• Customized Employee Profile validation with notifications and reports• Employee Enable with email for Web and Mobile logins• Employee T&C Acceptance• View assigned system responsibility for each employee
Employee Personal Profile 	<ul style="list-style-type: none">• Personal information with addresses, contacts and more• Qualifications, Certificates and Past employments• Skills Inventory and search• Identity details• Family details, family member in organization, workflow for nominations• Add Custom fields as required from UI• File attachment option• Custom fields• Profile Completion checks
Employment Profile	<ul style="list-style-type: none">• Employee Code generation• Time lined Employment status, category, designation, location and more• Custom Entry Fields• Assigning of reporting hierarchy level(s)• e-Personnel file with attachments• On-line Employee Business Card with QR• History of profile data changes• Employment Life Cycle data with “Date range”• Employee wise shift assignment• Employee wise control on Mobile App features
Terms and Conditions	<ul style="list-style-type: none">• Setup terms of employment like NDA etc.• Acceptance as checkmark, download, sign, print, scan and upload, online signature
Letters	<ul style="list-style-type: none">• Letter Templates with letter head

	<ul style="list-style-type: none"> • Issue letters to employees • Letter acceptance process as checkmark, download, sign, print, scan and upload, online signature • Company Digital and or signed Signatures
Announcements	<ul style="list-style-type: none"> • Use as e-Notice board • Make announcements as videos, pdf, images and assign to all, group of employees or Units
Surveys 	<ul style="list-style-type: none"> • Create Survey form by adding your specific questions • Open Surveys to all or employee groups • One time or periodic surveys • Anonymous or Open Surveys • Survey reports
Responsibilities	<ul style="list-style-type: none"> • Check Responsibilities of Employee in system like reporting, HOD, permissions etc
Employee File	<ul style="list-style-type: none"> • Maintain Employee file with uploaded documents • Assign file number reference
Exit Process 	<ul style="list-style-type: none"> • Clear and reassign Responsibilities • Voluntary and Involuntary separations with auto reminders to HR • Resignation Request with auto calculation of short fall days • Resignation acceptance process • Employee feedback form • No dues form • Handover form • Full and final payroll
Skill Inventory	<ul style="list-style-type: none"> • View Consolidated Employee Skills <ul style="list-style-type: none"> ◦ Qualifications ◦ Experience ◦ Certifications ◦ Trainings ◦ Performance Ratings

⌚ Leave and Attendance

Workflow

Holiday Calendar	<ul style="list-style-type: none">• Location based single or multiple holiday calendar(s)• Overtime Type as per the holiday
Leave	<ul style="list-style-type: none">• Add all Leave Types and auto entitlements• Map policy rules on Pre or Post leave applying• Location wise Leave allotment• Auto Carry forwards• Compensatory off, Short Leaves• Clubbing Rules• Cover person assignment• Custom Rules• Option to approve leave from email itself• Supervisor to apply leave on behalf of subordinate
Attendance	<ul style="list-style-type: none">• Fixed Shifts or Shift Patterns• Periodic Rosters upload or auto Rostering• Split shifts• Week offs• Holidays• Biometrics Integration• Mobile app with geo fence, face capture and recognition, geo coding• Web Check In and Check Out• Template based or Log file attendance upload• Regularization process• Late and Early calculation and penalties• Overtime Types and calculations as per policy• Overtime approval process• Overtime Pre-requests process with approvals• Auto Leave application before payroll generation• Attendance freeze dates• History of attendance changes with details

Biometrics	<ul style="list-style-type: none"> • Direct integration with HRMates cloud server • Plug & play configurations to the cloud server • Pull previous attendance data from any date • Add employees to the device from HRMates • Copy employee data from one device to another • View number of employees registered to each device • View the device status (online or offline) • View last connected time • View last punched captured time
Line Balancing	<ul style="list-style-type: none"> • Create Lines structure in the HRMS • Capture employee presence in advance • Graphical view of each line with employees • Indicates absent employees in different colour • Create daily line plan by assigning alternative employees for absent employees • View skill set of each employee • History of employee line movement for any period
Monitoring	<ul style="list-style-type: none"> • Attendance analytics • Daily Attendance Report via email • Attendance Reports • Workforce tracking on Map based on attendance punch location

Field Visits

Planning	<ul style="list-style-type: none"> • Plan visits in advance by self or manager • Plan visit approval process
Data Entry	<ul style="list-style-type: none"> • Custom data entry form • Offline support • Reports in excel format
Travel Distance	<ul style="list-style-type: none"> • Daily distance travelled calculation using google maps • Route display • Link to Expense module for reimbursement
Document Sharing	<ul style="list-style-type: none"> • Share flyers, schemes etc. with field staff • Notification to field staff for new document
Live Location Tracking	<ul style="list-style-type: none"> • Managers can track live locations of field workforce • Auto stop of tracking after duty hours • Track tracking failure reasons like location off, network off and more
Performance 	<ul style="list-style-type: none"> • Targets and achievements • Monthly Reports

More Details on Field Visits

[HRMates Field Visits Demo.pdf](#)

Payroll

Workflow

Salary Master	<ul style="list-style-type: none">Organization's specific custom components with calculatorsReverse calculation based on CTC or GrossCustom fields to control overtime applicability, statutory contributions...Bulk upload option of Salary Master dataSalary master approvals as per the organization's policyEmployee roles category wise salary master's like full time, consultantMultiple Salary Masters for an employee for cost centre wise salary paymentHistory of salary changes with details
Employee declarations <u>Workflow</u>	<ul style="list-style-type: none">Process for employee to declare items affecting payrollApproval process
Loans and advances	<ul style="list-style-type: none">Loan Request with Policy validationThird Party LoansApprovalInstalment generation with interestAdvance payment
Salary Generation	<ul style="list-style-type: none">Custom GroupingDistributed managementCustom Components with CalculatorsAttendance integration paydays, overtime, leave encashmentAuto Loan deductionAttendance freeze for employee and managersArrears for Salary Master Effective Date and days from past monthsManual upload of componentsFull and finalApproval Process with ComparisonSalary Slips and CustomizationSalary externally generated documents distribution (outsourced payroll)
Integration	<ul style="list-style-type: none">Integration with accounting systemBank Advises for salary and third-party loansIntegration for Statutory deductions like social security

Employee Self Service

	<ul style="list-style-type: none">• Dashboard• Notifications on dashboard and email• Mobile and Web
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Training

Workflow

E-Library 	<ul style="list-style-type: none">• Uploaded Videos, Spreadsheets with meta data• Self-Learning• Manager Assignment• Pre and Post Test• Learning Index
Needs Identification	<ul style="list-style-type: none">• Training Needs Survey• Performance Management• Manager Requests• Self-Requests
Physical Training	<ul style="list-style-type: none">• Scheduling• Pre and Post Test• Learning Index• Feedback



Lifecycle Evaluations (Performance)

Probation	Performance
Trainee	Performance Improvement Plan
Candidate	Integrated Development Plan

Workflow

Management	<ul style="list-style-type: none"> Multiple Template for each Evaluation period Rules to map employees to templates Template contains Areas, KRAs, KPIs with calculators Process includes Self, Managers, HODs, Raters, Vendors and any other relationship. Define review stages
Goal Settings	<ul style="list-style-type: none"> Contains Goals, Weightages, Unit of measures and any other item Preset from Template By Admin Self Defined Manager Defined Combination of above Approval Process
Competency framework	<ul style="list-style-type: none"> Template Defined competencies Auto populate competencies to evaluations
Reviews 	<ul style="list-style-type: none"> Ratings and comments with custom values Any Period By Self, Managers, HODs, Raters, Vendors and any other relationship
Appraisal 	<ul style="list-style-type: none"> Ratings and comments with custom values By Self, Managers, HODs, Raters, Vendors and any other relationship
Feedback 	<ul style="list-style-type: none"> By Self Verification by Managers, HODs, Raters, Vendors and any other relationship
Outcomes	<ul style="list-style-type: none"> Bell Curve 9 Box Matrix Spider Chart Reports

	<ul style="list-style-type: none"> • Salary Increment Fitment • Salary Increments • Performance Improvement Plan
Increment and Promotions Letters	<ul style="list-style-type: none"> • Generation • Acceptance Process
Self Service	<ul style="list-style-type: none"> • View my Evaluations • View Evaluation done by me • Protection for sensitive data visibility

Reward & Recognition Workflow

Rewards	<ul style="list-style-type: none">• Modules based Programs with auto calculations• Manual Programs with uploads• Leaderboard• Redemptions
Recognize	<ul style="list-style-type: none">• Star Officer• Well Done• Peer to Peer• Applause

Project & Timesheets Workflow

- Clients
- Projects
- Milestones
- Budgets
- Tasks
- Hours Utilization by manually or Task In & Out option
- Analysis

Employee Assets Workflow

- Asset Groups
- Asset Templates with custom data
- Inventory
- Issues
- Returns
- Reports
- Uploads



Employee Expenses

Workflow

- Travel Plan
- Advances
Generate bank advise for advances
- Bookings
- Expense Submission
- Cancellation
- Balance Carry forward
- Travel Report
- Accounts Integration



Social Engagement

Greetings	<ul style="list-style-type: none">• Birthday• Marriage and Work Anniversary• New Joiner• Holiday Greetings
Family Connect	<ul style="list-style-type: none">• Create Events• Families Post on Events• Rewards via R & R



Helpdesk

Workflow

- Categories and Sub Categories
- Category wise Help document
- Managers and Escalations
- Close, Hold, Reopen
- Analytics and Reports



📖 Knowledge Management Portal

Workflow

- Define Committees and Approvers
- Knowledge Submission and Approval
- Knowledge Portal with likes and reviews 
- Rewards for submission, most liked etc.

💡 Suggestion / Idea Management

Workflow

- Define Committees, Apex Committees and Members
- Suggestion submission by individuals or teams consisting of employees and vendors with improvement idea and supporting documents.
- Suggestion Events with special rewards
- Filter Duplicate suggestions *using Gen AI*
- Suggestion approval by committee or escalation to apex committee
- Rewards for submission and or approval
- Formation of Implementation team by HODs and creation of Kaizen Sheet to capture implementation
- On Implementation completion formation of Audit Team to measure benefits
- Sharing of benefits as R&R with suggestion and implementation teams
- Suggestion Portal repository
- [Kaizen Workflow](#)

MP Sheet

- Maintenance Prevention Submission with approval process
- Rewards
- Reports

CAPA

- Corrective actions and Prevention Submission with approval process
- Rewards
- Reports

Safety

- Setup Safety Committees and members and Escalations
- Submission of Safety Issues Observed
- Submission of Hazardous Events and Auto Escalations

Canteen Management

- Gather employee request for meals via Mobile or Kiosk with biometric login
- Token Printing
- Scheduled email of meals request reports
- Payroll integration

HRMates Approval Process

Workflow

Process of building a generic form and process for collaboratively approving a request, incorporating relationships-based approvals, validations, calculations, notifiers, escalations, and closure.

1. Requirements Gathering:

- Understand the types of requests that need approval.
- Identify stakeholders involved in the approval process.
- Determine approval criteria and escalation paths.

1. Designing the Form:

- Create a form using existing Process Template standard or new Form.
- Include fields for necessary information such as requester details, request type, request details, and any relevant attachments.
- Utilize lookup fields to establish relationships with related records (e.g., related accounts, contacts, or custom objects).

1. Building the Process:

- Utilize Approval Process Builder to define the approval process flow.
- Start the process when a new request form is submitted.
- Define criteria for triggering the approval process (e.g., request type, amount, or specific field values).
- Use immediate actions to perform validations, calculations, and initial notifications based on the submitted form data.

1. Approval Steps:

- Configure approval steps based on your organization's hierarchy or custom criteria.
- Utilize approval processes or workflows to route the request to the appropriate approvers.
- Set up approval criteria for each step, considering factors like approval limits, s, or specific users.
- Incorporate parallel or sequential approvals as needed.

1. Relationships-based Approvals:

- Leverage HRMates hierarchy or custom relationships to determine approval paths.
- Use criteria-based sharing rules to ensure that the right people have access to the records they need for approval.

1. Validations and Calculations:

- Implement validation rules to enforce data integrity and ensure that required fields are populated correctly.

- Use formula fields or process builder to perform calculations based on the submitted data (e.g., cost estimates, deadlines).

1. Notifiers and Escalations:

- Configure email notifications to keep stakeholders informed about the status of their requests.
- Implement escalation rules to automatically escalate pending approvals if they are not acted upon within specified timeframes.
- Include escalation actions such as notifying higher-level approvers or reassigning approvals to alternate users.

1. Closure and Follow-up:

- Once all approval steps are completed, update the status of the request form to reflect its final disposition (approved, rejected, etc.).
- Optionally, trigger additional actions such as creating related records, updating related data, or sending follow-up notifications to requesters.

1. Testing and Iteration:

- Test the form and approval process thoroughly in a sandbox environment to ensure that it functions as expected.
- Gather feedback from stakeholders and iterate on the design and functionality as needed to improve user experience and efficiency.

By following these steps and leveraging the capabilities of HRMates Approval Process, you can create a robust and scalable solution for collaboratively approving requests while incorporating relationships-based approvals, validations, calculations, notifiers, escalations, and closure.

Reports

Employee Reports

Academics Report	Employee Profile	Location Master Report
All Employees Report	Incomplete	Nomination Report
Bank Details Report	Employee Report	Past Employee Report
Employee Dependent Report	Employment Changes Report	Rejoin Report
Employee Exit Report	Employment Report	Site Report
Employee Information	Identity Details Report	Transfer Report

Leave & Attendance Reports

Adding Compensatory Off Report	Biometric Registration Report	Missing or Extra Attendance Report
All Leave & Attendance Report	Daily Attendance Punch Noncompliance Report	Mobile Registration Report
Attendance Audit Report	Employee Monthly Attendance Confirmation by signature	Overtime Detailed Report
Attendance Changes Report	Holiday Report	Punch Report
Attendance Report	Late Coming Detailed Report	Punch with Un matched Photo Report
Attendance Report by Presence	Late Coming Report	Regularization Report
Attendance Report by Presence - Print	Leave Adjustment Report	Roster
Attendance Report by Time	Leave and Attendance Approvers	Routes Detailed Report
Attendance Shift Report	Leave Detail Report	Routes Summary Report
Attendance Summary Report	Leave Encashment Report	SAP Leave
	Leave Summary Report	SAP Week Off Report
	Leave Utilization Report	SAP Atten
		Unapproved Leave Report
		Weekly Attendance

Payroll Reports

TDS Report	Loans Pending for Approval	Salary Account Heads Report
Bank Advice Report	Professional Tax Report	CTC Increment Report
Salary Details Report	TDS Annexure II	EPF Online Remittance Report
PF Report Upload	LWF Report	ETF Online Remittance Report
ESIC Report Upload	R4 Remittance Report	Salary Summary Report
CTC Report	R1 Remittance Report	Salary Variance Report
Loan Report	C Form Report	
Consultant Invoices	Salary Template	
Form D	Bank CEFT Report	C and B Report
KSCEWW Report	Pago Report	Salary Component Report
EPF Report	Salary Control Sheet	ETF Form II Return
ESIC Report		
Tax Declaration Report		

Suggestion, KM, Rewards Reports

Kaizen Report	Suggestion Management	Suggestion/Kaizen Details Report
Suggestion Report	System Status	
KM Report	Suggestion Status Report	Suggestion Status Detail Report
Capa Report	Suggestion Given Reward Report	
Reward Report	Well Done Summary Report	Suggestion Summary Report
Reward Summary Report	Suggestions Received Report	Suggestion Progress Report
We Connect Report		

Travel Reports

Travel Advance Report	Expense Report
Trave Detail	Expense Payment Report
Travel Detail Employee wise	

Time Sheet Reports

Time Sheet Report	Employee Utilization Report	Task Report Week Wise
Project Hours Utilization Report	Project Structure Report	Project Category Report
Project Summary Report	Employee Task Report	Project Profitability

Training Reports

Training Effectiveness Approval Report	TNI Approval Report
Training Report	E Training Report
E-Library Status Report	Training Effectiveness Detail Report
Training Calendar Employee Wise	TNI Setup Report
TNI Skill Report	Training Data Report

Hiring Reports

Open Vacancies Report	Hiring Metrics
Budget Report	Hiring Detailed Report
Candidate Report	

Audit Reports

Login Audit Report
Email Audit Report
Last Login Report
Audit Report
Social Engagement

Evaluations Reports

PMS Approval	Evaluation Yearly Total Report
PMS Detailed	Evaluation Progress Report
Approval process Detail Report	

Safety Reports

Safety Observation Summary Report

Asset Reports

Asset Report

Field Visits Reports

Field Visits Detail Report

Survey Reports

Survey Details Report

Survey Summary Report

Survey Report

Helpdesk Reports

Helpdesk Details Report

Other Reports

Employee Variance

Permission Report

Org Structure Report

External Manager Report

HR Documents



EmailsMates
Work Email Solution

👉 Work Email Solution

Welcome to EmailsMates, where communication meets simplicity. In the fast-paced world of modern business, effective communication is the backbone of success. Recognizing the need for a communication solution that prioritizes simplicity without compromising functionality, we present EmailsMates – a no-frills, vanilla email platform meticulously crafted for organizations like yours.