

Changes to HRMS System

**Refer ZOHO People for UI*

A. HRMS Dashboard

B. Employee Attendance

1. Calendar view

2. List view

3. Shift - Give option to enter time duration in 12 hours format

c. Employee Overview - Employee database management

1. Personal details -

- **Name:** Full Name (First Name, Middle Name, Last Name)
- **Email ID:** Employee's official email addresses.
- **Photo Upload Option:** Upload a profile picture (JPEG/PNG with a size limit, e.g., 2MB).
- **Father's/Husband's Name:** Add a dropdown to specify the relationship (Father/Husband), followed by a text box for the name.
- **Father's/Husband's Contact Number:** Mobile number (validate the format).
- **Date of Birth:** Select using a calendar option (DD/MM/YYYY format).
- **Age (Auto-calculated):** Automatically calculate and display age based on the date of birth.
- **Marital Status:** Dropdown with options: **Single, Married,**

2. Documents:

- **Aadhar Card** (Upload option)
- **PAN Card** (Upload option)

- **Offer Letter** (Upload option)
- **Appointment Letter** (Upload option)
- **NDA** (Upload option)

3. Work Information:

- **Date of Joining** (Calendar selection)
- **Designation** (Dropdown or text input)
- **Department** (Dropdown or text input)
- **Reporting Manager Name** (Searchable dropdown linked to manager profiles)
- **Roles and Responsibilities** (Editable text box for detailed input)
- **Employee Type** (Dropdown: Probation / On-Role)
- **Employee role** - Employee, TL, project manager, Floor manager, jr.HR, Sr, HR, Admin, jr Accountant , sr, Accountant and Management
- **Employment Status** - Active/ Resigned/ Terminated/ absconded

4. Education Card:

- **Year of Passout** (Year selection dropdown)
- **Percentage/Grade** (Numeric field)
- **University** (Text input or dropdown if predefined options exist)
- **Degree** (Dropdown with options like Bachelor's, Master's, etc.)

D . Hierarchy Setup for HRMS Software

1. Reporting Structure

- **Hierarchy Design:**

- **Employee → Team Leader (TL) → Project Manager → Floor Manager → Directors**
- **Sr. HR → Floor Manager / Directors**
- **Jr. HR → Sr. HR**
- **Sr. Accountant → Floor Manager / Directors**
- **Jr. Accountant → Sr. Accountant**

2. Functionalities

- **Add, Edit, Delete Options for Each Level:**
 - Ability to add, edit, or delete roles, designations, departments, and reporting relationships.
 - Update hierarchy dynamically, ensuring changes reflect across all linked entities (e.g., employee forms, reports).
- **Department Management:**
 - Add, delete, or modify departments.
 - Assign or reassign roles to departments.
 - Map Team Leaders (TL) and their respective team members within a department.

3. Employee Form Integration

- **Reporting Details:**
 - Once an employee role is selected (e.g., "Team Leader"), the reporting hierarchy is automatically reflected in the employee's form.
 - For example:
 - If "Team Leader" is selected, the form should display their reporting to "Project Manager."
 - Similarly, selecting "Jr. Accountant" should show reporting to "Sr. Accountant."

The hierarchy should reflect across - Employee details form. And Performance review workflows.

E. Holiday

1. Holiday List Setup:

- Create a **Holiday List** feature that allows the HR department to:
 - Add new holidays with the holiday name and date.
 - Edit existing holidays (change name or date).
 - Remove holidays if necessary.

2. Attendance Integration:

- Ensure holidays reflect in:
 - **List View:** Holidays should be clearly marked in the attendance report for easy identification.
 - **Calendar View:** Holidays should appear as highlighted or marked days in the monthly calendar view.

3. Holiday Reminder Notifications:

- Enable **department-wise reminders** for upcoming holidays:
 - Send email reminders to respective departments **2 days before the holiday**.
 - Include holiday details (name and date) in the email.

4. Announcement System:

- Add a feature to display holiday announcements on the HRMS dashboard.
 - Announcements should appear in the "Announcements" card
 - Notifications should be sent to all employees along with the reminder email.

F. Leave Day Maintenance Setup Requirements for HRMS:

1. Leave Types:

- Create **two types of leaves**:
 - **Paid Leaves**: Regular leaves allotted to employees as per company policy.
 - **Unpaid Leaves**: For leaves taken beyond the allocated limit.

2. Monthly Leave Allocation:

- Automatically allocate:
 - **1 Sick Leave (SL)** per month.
 - **1 Casual Leave (CL)** per month.
- Ensure this allocation is added automatically on the **1st day of every month**.

3. Leave Carry Forward:

- Enable **carry forward functionality**:
 - If any paid leave (Sick or Casual) is **not used** within a month, it should be carried forward to the next month.

4. Leave Calculation and Usage:

- Implement a **total leave count (employee-wise)**:
 - Maintain a clear dashboard showing the total number of leaves allocated, used, and carried forward.
 - Ensure **half-day leaves** are calculated automatically and deducted appropriately from the leave balance.

5. Unpaid Leaves:

- Create a section for **Unpaid Leaves**, which will:
 - Reflect any extra or unpaid leaves taken beyond the allocated limit.
 - Use data pulled from the **attendance report** to calculate and display unpaid leave days.

6. Leave Adjustment:

- Allow **manual adjustment options** (add, edit, or delete leave records) to HR only

G. Performance Management Setup:

1. Feedback Collection Forms

- **Frequency:** Automatically trigger forms every 6 months after an employee's Date of Joining (DOJ).
- **Form Design:**
 - Feedback to be collected from:
 1. **HR**
 2. **Reporting Managers**
 - Include a **scale rating (1-10)** for evaluating different parameters (e.g., Communication, Teamwork, Initiative, etc.).
- **Storage:** Maintain records in a centralized database for future reference and reporting.

2. Salary Appraisal Records

- **Appraisal Status:**

Add a section showing the status for employees under appraisal:

 - In Process

- Rejected
- Appraisal Done
- **Completed Appraisals:**

For employees with completed appraisals, include:

- Old Salary
 - New Salary
 - Percentage of Appraisal
 - Month/Year of Appraisal
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H Onboarding Formalities:

1. Previous Company Documents:

- Request the employee to submit the following documents from their previous company:
 - 3 recent salary slips
 - Experience letter
 - Relieving letter
 - HR email of the last company for verification
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I. Exit Formalities:

1. Signed Exit Letter:

- Ensure the employee submits a signed exit letter as part of the exit procedure.

2. Access Removal:

- Remove the following access from the employee's account:
 - Door access

- Skype access
- GoodSheet access (if applicable)

3. Resignation Details:

- Collect and record the following information:
 - Date of resignation
 - Last working day
 - Notice period status (served or not served)

4. FNF (Full and Final) Status:

- Include a dropdown to select:
 - Release salary
 - Hold salary

J. HR analytics and reporting

1. Leave Utilization:

- Display total leaves taken by employees versus total leaves allotted.
- Show data monthly, quarterly, and yearly.
- Format: Table with employee names, total leaves, used leaves, and remaining leaves.

2. Retention Rate:

- Calculate employee retention rate based on the number of employees staying in the company for a given period (monthly, quarterly, and yearly).
- Format: Table with data for each period (monthly, quarterly, yearly), and graphs displaying retention trends.

3. Acquisition Rate:

- Track new hires and turnover rate, showing the acquisition rate over the months.
- Format: Table with the number of new hires and employee turnover, accompanied by graphs for visual representation.

4. Salary Appraisal:

- Track and display salary appraisal data including the employee name, old salary, new salary, and appraisal amount.
 - Format: Table with monthly, quarterly, and yearly breakdowns of salary appraisals.
 - Provide graphs showing salary increases across departments or teams.
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K. Communication Mode

1. Announcement Communication Mode:

- Create an announcement feature that generates content in the form of an email.
- Add options for selecting the department and employee(s) to target specific communication.
- It should display on announcement card of each employee and employee should get individually email on the email mention in personal details.

2. Notification Communication Mode:

- Set up notifications for leave approvals, ensuring that HR and employees receive alerts when a leave request is approved or denied.
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L. Payroll and Accounting:

1. Employee List:

- Display a list of employees department-wise or by employee ID.
- Include columns for the following information: Name, Role, DOJ, Salary, Appraisal Data.

2. Salary Structure:

- Automatically calculate the salary components based on the company's structure:
 - Basic Salary: 30-50% of the Gross Salary (will vary based on the salary amount).
 - HRA (House Rent Allowance): 10-40% of Basic Salary (with a cap at 40%).
 - CCA (City Compensatory Allowance): Remaining amount after Basic and HRA calculations.
 - PT (Professional Tax Deduction): ₹200 per month (₹300 in February).

Additional Notes -

- Add a **Save** and **Edit** button for easy data input and modifications.
- **User-friendly Interface:** Ensure all cards are visually organized and easy to navigate.
- **Validation:** Add field validations (e.g., Aadhar number should be 12 digits, mandatory fields should not be left blank, etc.)
Notification to HR once done with prohibition of 3 month from DOJ to change status to on roll
- Make a mandatory field to all options except appointment letter.