HR Module

This comprehensive manual explains how to manage employee records within the application, including viewing existing employees, adding new ones, inviting employees, and importing/exporting employee data.

Employees

The "Employees" page serves as your central hub for managing all employee records. It provides filtering, search, and action options.

Top Filters and Search:

- **Employee dropdown (All):** This dropdown likely allows you to filter employees by their status (e.g., Active, Inactive).
- **Designation dropdown (All):** This dropdown allows you to filter employees by their job designation.
- **Search bar:** Type text into this field to search for employees by ID, name, email, or other details.
- **Filters button:** Clicking this button might reveal more advanced filtering options.

Action Buttons:

- **Add Employee:**
  - **Purpose:** To manually add a new employee record to the system.
  - **How to Use:** Click the green "+ Add Employee" button. This will open the "Add Employee" form (not shown in this image, but typically similar to "Add Client" with employee-specific fields).
- **Invite Employee:**
  - **Purpose:** To send an invitation to a new employee to join the application and create their account.
  - **How to Use:** Click the "+ Invite Employee" button. This will likely open a modal or navigate to a page for sending an email invitation.
- **Import:**
  - **Purpose:** To import employee data from an external file (e.g., CSV, Excel).
  - **How to Use:** Click the "Import" button. This will likely open a modal or navigate to a page for uploading an import file.
- **Export:**
  - **Purpose:** To export existing employee data from the system into a file (e.g., CSV, Excel).
  - **How to Use:** Click the "Export" button. This will usually trigger a file download.

Employee List Table:

This table displays a summary of your employee records.

- **Employee ID:** A unique identifier assigned to each employee (e.g., "EMP-220").
- **Name:** The employee's full name.
  - **"View Here" link:** Clicking this might lead to the employee's detailed profile page.
- **Email:** The employee's primary email address.

    - **"Email" tooltip:** Hovering over the email address provides the full email.
- **User Role:** The role assigned to the employee within the application (e.g., "App Administrator").
- **Reporting To:** The manager or supervisor the employee reports to.
- **Status:** The current status of the employee (e.g., "Active").
- **Action:** This column provides options for managing individual employee records:
    - **Three-dot icon:** Clicking this icon will likely reveal a dropdown menu with options such as "Edit" (to modify employee details), "Delete" (to remove the employee record), "View Profile", "Deactivate", etc.
- **Current Status:** "Showing 1 to 1 of 1 entries" indicates that one employee record is currently present in the system.

Table Navigation:

- **Show X entries:** A dropdown to select how many entries are displayed per page (e.g., "Show 100 entries").
- **Showing X to Y of Z entries:** Indicates the current range of entries being displayed out of the total number of entries.
- **Previous / Next buttons:** Used to navigate through multiple pages of employees if there are more entries than displayed on a single page.

Leaves

The "Leaves" page serves as your central hub for managing all employee leave requests and records. It provides filtering, search, and action options, along with different display views.

Top Filters and Search:

- **Duration / Start Date To End Date:** These fields allow you to filter leave requests based on a specific date range.
- **Search bar:** Type text into this field to search for leave requests by employee name or other details.
- **Filters button:** Clicking this button might reveal more advanced filtering options.

Action Buttons:

- **New Leave:**
  - **Purpose:** To manually submit a new leave request for an employee.
  - **How to Use:** Click the green "+ New Leave" button. This will open the "Apply Leave" form (not shown in this image, but typically similar to "Add Event" or "Create Ticket" with leave-specific fields).
- **Export:**
  - **Purpose:** To export existing leave data from the system into a file (e.g., CSV, Excel).
  - **How to Use:** Click the "Export" button. This will usually trigger a file download.

View Options (Right Side of Action Buttons):

- **List View (Currently Selected):** The icon with horizontal lines indicates the current view, which is a table list of leave requests.
- **Calendar View:** The calendar icon likely switches to a calendar display, showing approved leaves on a daily/weekly/monthly basis.
- **User/Employee View:** The person icon might switch to a view organized by individual employees, showing their leave history.

Leaves List Table:

This table displays a summary of your employee leave records when in list view.

- **Checkbox:** A checkbox next to each leave entry for multi-selection actions (e.g., bulk approve/reject).
- **Employee:** The name of the employee who requested the leave.
- **Leave Date:** The specific date(s) for which the leave was requested.
- **Duration:** The length of the leave (e.g., "1 Day", "0.5 Day").
- **Leave Status:** The current status of the leave request (e.g., "Pending", "Approved", "Rejected").

- **Leave Type:** The category of leave (e.g., "Sick", "Casual", "Annual").
- **Paid:** Indicates whether the leave is paid or unpaid.
- **Action:** This column provides options for managing individual leave records:
  - **Edit:** Likely an "Edit" button or icon to modify an existing leave request.
  - **Delete:** A "Delete" button or icon to remove a leave request from the system. This usually prompts for confirmation.
  - **(Expected for pending leaves):** "Approve" and "Reject" buttons/icons for managers/HR to process the request.
- **Current Status:** "No data available in table" indicates that no leave records have been added yet.

Table Navigation:

- **Show X entries:** A dropdown to select how many entries are displayed per page (e.g., "Show 100 entries").
- **Showing X to Y of Z entries:** Indicates the current range of entries being displayed out of the total number of entries.
- **Previous / Next buttons:** Used to navigate through multiple pages of leaves if there are more entries than displayed on a single page.

Shift Roster

The "Shift Roster" page provides a visual representation of assigned employee shifts. It offers filtering, navigation through dates, and options to assign shifts.

Top Filters and View Options:

- **Employee dropdown (All):** This dropdown allows you to filter the roster to show shifts for a specific employee.
- **Department dropdown (All):** This dropdown allows you to filter the roster to show shifts for employees within a specific department.
- **Weekly View dropdown:** This dropdown currently shows "Weekly View", suggesting other views like "Daily View" or "Monthly View" might be available.

Action Buttons:

- **Assign Bulk Shifts:**
  - **Purpose:** To assign shifts to multiple employees for multiple days at once, streamlining the scheduling process.
  - **How to Use:** Click the green "+ Assign Bulk Shifts" button. This will likely open a modal or form to configure the bulk assignment.
- **Export:**
  - **Purpose:** To export the current shift roster data (e.g., to CSV, Excel) for record-keeping or external analysis.
  - **How to Use:** Click the "Export" button. This will usually trigger a file download.

View Options (Right Side of Action Buttons):

- **Roster View (Currently Selected):** The icon with horizontal lines indicates the current view, which is the detailed shift roster.
- **List View:** The icon with a simple list might switch to a more condensed list format of shifts.

Date Navigation:

- **Navigation Arrows (< >):** Use these to move to the previous or next week (or day/month depending on the selected view).
- **Current Date Range:** Displays the current week's date range being viewed (e.g., "30 Jun - 06 Jul").
- **Today Button:** Click to jump back to the current week's roster.
- **Legend (Top Right of Roster):** Shows a small legend for shift types, like "GS: General Shift" and "Holiday".

Shift Roster Grid:

The main area displays the shift roster in a grid format, typically showing employees on the left and days of the week across the top.

- **Employee Column:** Lists the names of the employees (e.g., "Adam Harith"). "It's you" indicates the logged-in user.
- **Date Columns:** Each column represents a day of the week within the selected date range (e.g., "30 MONDAY JUN", "1 TUESDAY JUL", etc.).
- **Shift Assignment Cells:** Within each cell, for each employee and day:
    - A green "+" icon is visible, indicating that a shift can be assigned to that employee on that specific day. Clicking this would likely open a modal to select a shift.
    - The green dot indicates a shift has been assigned (likely the "General Shift" based on the legend).

Attendance

The "Attendance" page provides a detailed monthly view of employee attendance, along with options for marking attendance, importing, exporting, and various filters.

Top Filters and Date Selection:

- **Employee dropdown (All):** Filter attendance records for a specific employee.
- **Department dropdown (All):** Filter attendance records for employees within a specific department.
- **Designation dropdown (All):** Filter attendance records for employees with a specific designation.
- **Month dropdown:** Select the month for which you want to view attendance (e.g., "June").
- **Year dropdown:** Select the year for which you want to view attendance (e.g., "2025").

Action Buttons:

- **Mark Attendance:**
    - **Purpose:** To manually mark an employee's attendance (e.g., Present, Absent, Half Day).
    - **How to Use:** Click the green "+ Mark Attendance" button. This will likely open a modal or form to select an employee, date, and attendance status.
- **Import:**
    - **Purpose:** To import attendance data from an external file (e.g., CSV, Excel).
    - **How to Use:** Click the "Import" button. This will likely open a modal or navigate to a page for uploading an import file.
- **Export:**
    - **Purpose:** To export the current attendance data from the system into a file (e.g., CSV, Excel).
    - **How to Use:** Click the "Export" button. This will usually trigger a file download.

View Options (Right Side of Action Buttons):

- **Roster/Grid View (Currently Selected):** The icon with horizontal lines indicates the current view, which is the detailed monthly attendance grid.
- **List View:** The icon with a simple list might switch to a more condensed list format of attendance records.
- **Employee/Person View:** The person icon might switch to a view organized by individual employees, showing their attendance history.

Attendance Legend:

Below the action buttons, a "Note" section provides a legend explaining the symbols used in the attendance grid:

- **Holiday:** □□
- **Day Off:** □□
- **Present:** ✔
- **Half Day:** □□
- **Late:** □□
- **Absent:** □
- **On Leave:** ✈

Attendance Grid Table:

The main area displays the monthly attendance in a grid format, with employees on the left and days of the month across the top.

- **Employee Column:** Lists the names of the employees (e.g., "Adam Harith"). "It's you" indicates the logged-in user.
- **Day Columns (1 to 30/31):** Each column represents a day of the month. Below the number, the day of the week (Sun, Mon, Tue, etc.) is displayed.
- **Attendance Cells:** Each cell, at the intersection of an employee and a day, displays the attendance status using the symbols from the legend.
  - In the example for "Adam Harith" in June 2025:
    - Days 1-6 are marked with "x", indicating Sunday to Friday, possibly "Day Off" or not yet marked.
    - Days 7-16 are marked with "x", likely indicating "Absent".
    - Days 17-30 are marked with "x", indicating "Absent".
- **Total Column:** Shows a summary of attendance for the month for each employee (e.g., "0/30" likely means 0 days present out of 30 days in the month).

Table Navigation:

- **Show X entries:** A dropdown to select how many entries are displayed per page (e.g., "Show 100 entries").
- **Showing X to Y of Z entries:** Indicates the current range of entries being displayed out of the total number of entries.
- **Previous / Next buttons:** Used to navigate through multiple pages of attendance records if there are more entries than displayed on a single page.

Holiday

The "Holiday" page displays a calendar view where you can see existing holidays and add new ones.

Top Search Bar:

- **Search bar:** `Start typing to search` - Type text into this field to search for holidays by name or other details.

Action Buttons:

- **Add Holiday:**
  - **Purpose:** To manually add a new holiday to the calendar.
  - **How to Use:** Click the green "+ Add Holiday" button. This will likely open a modal or form to enter holiday details (e.g., name, date).
- **Mark Default Holidays:**
  - **Purpose:** This button is likely used to import or apply a set of pre-defined standard public holidays (e.g., based on your country's calendar).
  - **How to Use:** Click the "Mark Default Holidays" button. This might prompt for confirmation or a selection of regions/years.

View Options (Right Side):

- **List View:** The icon with horizontal lines might switch to a list format of holidays.
- **Calendar View (Currently Selected):** The calendar icon indicates the current view, which is the detailed calendar.

Calendar Navigation and View Options:

- **Navigation Arrows (< >):** Use these to move to the previous or next month.
- **Today Button:** Click to jump back to the current month's view.
- **Month/Week/Day/List Buttons:** These tabs allow you to change the calendar display:
  - **month:** (Currently selected) Displays a full month view.
  - **week:** Displays a single week.
  - **day:** Displays a single day.
  - **list:** Displays holidays in a list format, typically chronologically.
- **Current Month/Year:** The displayed month and year (e.g., "June 2025").

Calendar Grid:

- The main area displays the calendar grid with dates. If holidays are scheduled, their names would appear within the relevant date cells. The dates are labeled with the day of the week (Mon, Tue, etc.) and the date number.

Designation & Department

Roles and teams