**EMPLOYEE MASTER**

The employee master is like a dashboard which consists of the details of all the employees in the organization.

The employee master consists of the add button to add the details of the employees.

It consists of the export button to export the data of the employees if necessary.

It consists of the search bar which helps in search of the respective employee.

It consists of the sort and filter option which helps in sorting and filtering options.

It consists of fields such as

* Employee pic
* Employee name
* Designation
* Employee ID
* Gender
* E-mail ID
* Contact number
* Status of the employee
* Action button - View, Edit and History
* Add data
* Export data
* Export format
* Bulk upload

|  |  |
| --- | --- |
| **FIELDS** | **DESCRIPTION** |
| Employee pic | Profile picture of the employee |
| Employee name | Name of the employee |
| Designation  | The designation of the employee |
| Employee ID | The employee ID generated/ issued in the organization |
| Gender | The gender of the employee |
| E-mail ID | The company mail of the employee |
| Contact number | Business contact number, if given any or the personal contact number of the employee |
| Status  | The status of the employee whether active or inactive |
| Action  | The action button consists of view, edit and history.The view button is used to view the details of the employee.The edit button is used to edit the details of the employee.The history button is used to view the history. |
| Add data | To add the new employee in the master |
| Export data | To export the data |
| Export format | To export the format of the data for the bulk upload |
| Bulk upload | To bulk upload the data |

ADD DATA:

The employee details consists of

* Basic details
* Personal details
* Salary details
* Account details
* Contact details
* Educational details
* Professional details
* Family details

The basic details consists of

* Employee ID
* Employee name which consists of pretext and name
* Date of joining
* Branch
* Branch effective date
* Designation effective date
* Department
* Designation
* Department effective date
* Date of promotion
* Promotional remark
* Date of leaving
* Notice period
* Separation mode
* Role
* Reporting to
* Source
* Shift type

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| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE**  | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| Employee ID | Auto generated | Mandatory  | The unique number for each and every employee in the organization |
| Employee name | Pretext is drop downname is text | Mandatory | The name of the employee.Pretext consists of the drop-down having options Mr., Ms. And Mrs.Name consists of text box where the full name of the employee is mentioned. |
| Date of joining | Calender  | Mandatory | The joining date of the employee |
| Branch  | Drop down | Mandatory | The branch in which the employee is working |
| Branch effective date | Auto generated | Mandatory | The effective date of the branch which is automatically generated |
| Designation effective date | Auto generated | Mandatory | The effective date of the designation of the employee which is automatically generated |
| Department  | Drop down | Mandatory | The department of the employee belongs to |
| Designation  | Drop down | Mandatory | The designation of the employee |
| Department effective date | Auto generated | Mandatory | The effective date of the department which is automatically generated |
| Date of promotion | Calender  | Optional  | The date of promotion, if the employee gets any promotion |
| Promotional remark | Text  | Optional  | The promotional remark, if any |
| Date of leaving | Calender  | Optional  | The date of leaving of the employee |
| Notice period | Text  | Optional  | The notice period for the employee in case of any resignation or removal from the organization |
| Separation mode | Drop down | Optional  | The separation mode consists of the status of the employee such asResigned: if employee resigned from the organizationAbscond: if the employee abscondedTerminated: if the employee is terminated due to completion of the employment periodDeath: In case, if the employee died at the time of employmentActive: if the employee is working in the organization |
| Role  | Drop down | Optional  | The role consists of fields such as * Individual contributor
* Department head
* Manger
* Team leader
* Approving manager
* Employee
* Human resource
 |
| Reporting to | Drop down | Mandatory | The reporting manager of the employee. |
| Source  | Drop down | Optional  | The way of hiring an employee I.e., from online platforms or through consultancies etc |
| Shift type | Drop down | Optional  | The shift timings of the employee |

The personal details consists of

* Date of birth
* Birth place
* Gender
* Blood group
* Martial status
* Date of anniversary
* Nationality
* Permanent state ID
* City
* Pincode
* Attachment for document
* Present address
* Permanent address
* Personal contact number
* Personal email ID
* Aadhar card number
* Pan number
* Driving license number
* Driving license expiry date
* Gratuity number
* Passport number
* Physically handicapped

|  |  |  |  |
| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE**  | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| Date of birth | Calender  | Mandatory | The date of birth of the employee is selected |
| Birth place | Drop-down | Optional  | The place of birth of the employee. All the cities in the India are presented in the drop-down. |
| Gender  | Radio button | Mandatory | There are 2 radio buttons I.e., male or female. The gender of the employee is selected. |
| Blood group | Drop-down | Optional  | The blood group of the employee is selected. All blood group options are presented in the drop-down box.  |
| Martial status | Drop-down | Optional  | The martial status of the employee is selected. The drop-down box consists of married, unmarried, widow and widowed. |
| Date of anniversary | Calender  | Optional  | The date of anniversary is selected if the employee got married. |
| Nationality | In-built | Optional  | In-built, Indian is presented |
| Permanent state ID | Drop-down | Optional  | The state of the employee is selected. All the states are mentioned in the drop down list. |
| City | Drop-down | Optional  | The city of the employee is selected. All the cities in the India are presented in the drop-down. |
| Pin-code | Int | Optional  | The pin code of the employee lives in is entered |
| Attachment for document | File upload | Optional  | The file is uploaded if any documents or proofs presented by the employee |
| Present address | Text  | Optional  | The present address of the employee is entered |
| Permanent address | Text  | Optional  | The permanent address of the employee is different from the present address is entered. If it is the same as presented address, then select the button above “same as present address”.  |
| Personal contact number | Int  | Optional  | Personal contact number of the employee is entered |
| Personal email ID | Text  | Optional  | Personal e-mail ID of the employee is entered |
| Aadhar card number | Int  | Optional  | The aadhar card number of the employee is entered |
| Pan number | Text  | Optional  | The pan number of the employee is entered |
| Driving license number | Text  | Optional  | The driving license number of the employee is entered |
| Driving license expiry date | Calender  | Optional  | The driving license expiry date is selected |
| Gratuity number | Int  | Optional  | The gratuity number of the employee is entered |
| Passport number | Text  | Optional  | The passport number of the employee is entered |
| Physically handicapped | Radio button | Optional  | The radio consists of 2 options I.e., yes or no. If the employee is physically handicapped, then the yes is selected. If not, no is selected |

The salary details consists of

* On roll type
* Type of employment
* PT applicable
* Salary template
* Gross
* Variable pay
* Net/ take home
* CTC
* Basic
* DA
* HRA
* Conveyance allowance
* Medical allowance
* Other allowance
* Employer PF
* Employer ESIC
* Employee PF
* Employee PT
* Employee ESIC
* Annual CTC

|  |  |  |  |
| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE**  | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| On roll type | Drop-down | Mandatory | The drop down consists of * Non muster
* Muster
* Professional
* Management

Non muster refers to temporary or probation.Muster refers to permanent employees.Professional refers to consultant, auditor etc who will be paid for the particular role.Management refers to the higher employees. |
| Type of employment  | Drop-down | Optional  | The drop down consists of* Skilled
* Semi-skilled
* Unskilled
 |
| PT applicable | Drop-down | Optional  | PT refers to professional tax.The drop down consists of yes or no.If the employee is applicable, then yes is selected, if not, no is selected. |
| Salary template | Drop-down | Mandatory | There are different options in the salary template. The salary template is selected to which the employee is belonged. |
| Gross  | Int  | Mandatory | The gross amount of the employee is entered |
| Variable pay | Int  | Mandatory | The variable pay of the employee is entered |
| Net/ take home | Int  | Mandatory | The net/ take home of the employee is entered |
| CTC | Int  | Mandatory | The CTC refers to cost to company.The CTC of the employee is entered. |
| Basic | Int  | Mandatory | The basic amount of the employee is entered |
| DA | Int  | Mandatory | DA refers to dearness allowance.The DA amount of the employee is entered. |
| HRA | Int  | Mandatory | The HRA refers to house rent allowance.The HRA amount of the employee is entered. |
| Conveyance allowance | Int  | Mandatory | The conveyance allowance refers to transport allowance provided to the employee by the employer.The conveyance allowance amount of the employee is entered. |
| Medical allowance | Int  | Mandatory | The medical allowance of the employee is entered |
| Other allowance | Int  | Mandatory | The other allowances if any of the employee is entered |
| Employer PF | Int  | Mandatory | PF refers to provident fund.The employer PF number of the employer is entered |
| Employer ESIC | Int  | Mandatory | ESIC refers to Employee’s state insurance cooperation.The Employer ESIC of the employer is entered |
| Employee PF | Int  | Mandatory | The employee PF number of the employee is entered |
| Employee PT | Int  | Mandatory | The employee PT of the employee is entered |
| Employee ESIC | Int  | Mandatory | The employee ESIC of the employee is entered |
| Annual CTC | Int | Mandatory | The annual CTC of the employee is entered |

The account details consists of

* Bank name
* Bank account no
* IFSC code
* Bank branch name
* PF number
* PF nominee
* ESIC number
* ESIC nominee
* UAN number

|  |  |  |  |
| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE**  | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| Bank name | Text  | Optional  | The bank name of the employee is entered |
| Bank account no | Int  | Optional  | The bank account number of the employee is entered |
| IFSC code | Text  | Optional  | IFSC refers to Indian Financial System code.The IFSC code of the employee’s bank is entered. |
| Bank branch name | Text  | Optional  | The bank branch name of the employee is entered |
| PF number | Int  | Optional  | The PF number of the employee is entered |
| PF nominee | Text  | Optional  | The PF nominee of the employee is entered |
| ESIC number | Int  | Optional  | The ESIC number of the employee is entered |
| ESIC nominee | Text  | Optional  | The ESIC nominee of the employee is entered |
| UAN number | Int  | Optional  | The UAN refers to universal account number.The UAN number of the employee is entered. |

The contact details consists of

* Official mail ID
* Office mobile number
* Emergency contact number

|  |  |  |  |
| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE**  | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| Official mail ID | Text  | Optional  | The office mail id of the employee |
| Office mobile number | Int  | Optional  | The office mobile number of the employee, if any, is entered |
| Emergency contact number | Int  | Optional  | The emergency contact number of the employee in case of absentee  |

The educational details consists of

* Highest qualification
* University
* Passing year
* Grade

|  |  |  |  |
| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE**  | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| Highest qualification | Text  | Optional  | The highest qualification of the employee is entered |
| University  | Text  | Optional  | The university in which the employee graduated is entered |
| Passing year | Int  | Optional  | The passing year of the particular course of the employee is entered |
| Grade  | Text  | Optional  | The grade achieved in that course of the employee is entered |

The professional details consists of

* Previous company
* Previous designation
* Experience
* City
* From date
* To date

|  |  |  |  |
| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE**  | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| Previous company | Text  | Optional  | The previous company of the employee is entered, if the employee has any experience |
| Previous designation | Text  | Optional  | The previous designation of the employee is entered |
| Experience  | Int  | Optional  | The past experience of the employee is entered |
| City | Drop-down | Optional  | The city in which the employee employed is selected.The drop down consists of all the cities in the India. |
| From date | Calender  | Optional  | The date from which the employee started working initially is entered |
| To date | Calender  | Optional  | The last date in which the employee employed previously is entered |

The family details consists of

* Relation
* Full name
* DOB
* Aadhar number
* Action

|  |  |  |  |
| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE**  | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| Relation  | Drop-down | Optional  | The relation of the person with the employee is selected.The drop down consists of list of all the relations. |
| Full name | Text  | Optional  | The full name of the family member is entered |
| DOB | Calender  | Optional  | The date of birth of the family member is entered |
| Aadhar number | Int  | Optional  | The aadhar number of the family member is entered |
| Action | Button  | Optional  | The + button is there to add another family member details |

EXPORT DATA

To export the data

The following are the fields in the export data.

* Employee id
* Employee title
* Employee name
* Date of joining
* Branch
* Branch effective date
* Designation effective date
* Department
* Designation
* Department effective date
* Date of promotion
* Promotional remark
* Date of leaving
* Notice period
* Separation mode
* Role
* Reporting to
* Source
* Shift type
* Date of birth
* Birth place
* Gender
* Blood group
* Martial status
* Date of anniversary
* Nationality
* Permanent state ID
* City
* Pincode
* Attachment for document
* Present address
* Permanent address
* Personal contact number
* Personal email ID
* Aadhar card number
* Pan number
* Driving license number
* Driving license expiry date
* Gratuity number
* Passport number
* Physically handicapped
* On roll type
* Type of employment
* PT applicable
* Salary template
* Gross
* Variable pay
* Net/ take home
* CTC
* Basic
* DA
* HRA
* Conveyance allowance
* Medical allowance
* Other allowance
* Employer PF
* Employer ESIC
* Employee PF
* Employee PT
* Employee ESIC
* Annual CTC
* Bank name
* Bank account no
* IFSC code
* Bank branch name
* PF number
* PF nominee
* ESIC number
* ESIC nominee
* UAN number
* Official mail ID
* Office mobile number
* Emergency contact number
* Highest qualification
* University
* Passing year
* Grade
* Previous company
* Previous designation
* Experience
* City
* From date
* To date
* Relation
* Full name
* DOB
* Aadhar number

EXPORT FORMAT

To export the format.

The following are the fields in the export format.

* Employee id
* Employee title
* Employee name
* Date of joining
* Branch
* Branch effective date
* Designation effective date
* Department
* Designation
* Department effective date
* Date of promotion
* Promotional remark
* Date of leaving
* Notice period
* Separation mode
* Role
* Reporting to
* Source
* Shift type
* Date of birth
* Birth place
* Gender
* Blood group
* Martial status
* Date of anniversary
* Nationality
* Permanent state ID
* City
* Pincode
* Attachment for document
* Present address
* Permanent address
* Personal contact number
* Personal email ID
* Aadhar card number
* Pan number
* Driving license number
* Driving license expiry date
* Gratuity number
* Passport number
* Physically handicapped
* On roll type
* Type of employment
* PT applicable
* Salary template
* Gross
* Variable pay
* Net/ take home
* CTC
* Basic
* DA
* HRA
* Conveyance allowance
* Medical allowance
* Other allowance
* Employer PF
* Employer ESIC
* Employee PF
* Employee PT
* Employee ESIC
* Annual CTC
* Bank name
* Bank account no
* IFSC code
* Bank branch name
* PF number
* PF nominee
* ESIC number
* ESIC nominee
* UAN number
* Official mail ID
* Office mobile number
* Emergency contact number
* Highest qualification
* University
* Passing year
* Grade
* Previous company
* Previous designation
* Experience
* City
* From date
* To date
* Relation
* Full name
* DOB
* Aadhar number

BULK UPLOAD

The following is the format of bulk uploading the employee data.

|  |  |  |
| --- | --- | --- |
| **FIELDS** | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| Employee ID | Mandatory  | The unique number for each and every employee in the organization |
| Employee name | Mandatory | The name of the employee.Pretext consists of the drop-down having options Mr., Ms. And Mrs.Name consists of text box where the full name of the employee is mentioned. |
| Date of joining | Mandatory | The joining date of the employee |
| Branch  | Mandatory | The branch in which the employee is working |
| Branch effective date | Mandatory | The effective date of the branch which is automatically generated |
| Designation effective date | Mandatory | The effective date of the designation of the employee which is automatically generated |
| Department  | Mandatory | The department of the employee belongs to |
| Designation  | Mandatory | The designation of the employee |
| Department effective date | Mandatory | The effective date of the department which is automatically generated |
| Date of promotion | Optional  | The date of promotion, if the employee gets any promotion |
| Promotional remark | Optional  | The promotional remark, if any |
| Date of leaving | Optional  | The date of leaving of the employee |
| Notice period | Optional  | The notice period for the employee in case of any resignation or removal from the organization |
| Separation mode | Optional  | The separation mode consists of the status of the employee such asResigned: if employee resigned from the organizationAbscond: if the employee abscondedTerminated: if the employee is terminated due to completion of the employment periodDeath: In case, if the employee died at the time of employmentActive: if the employee is working in the organization |
| Role  | Optional  | The role consists of fields such as * Individual contributor
* Department head
* Manger
* Team leader
* Approving manager
* Employee
* Human resource
 |
| Reporting to | Mandatory | The reporting manager of the employee. |
| Source  | Optional  | The way of hiring an employee I.e., from online platforms or through consultancies etc |
| Shift type | Optional  | The shift timings of the employee |
| Date of birth | Mandatory | The date of birth of the employee is selected |
| Birth place | Optional  | The place of birth of the employee. All the cities in the India are presented in the drop-down. |
| Gender  | Mandatory | There are 2 radio buttons I.e., male or female. The gender of the employee is selected. |
| Blood group | Optional  | The blood group of the employee is selected. All blood group options are presented in the drop-down box.  |
| Martial status | Optional  | The martial status of the employee is selected. The drop-down box consists of married, unmarried, widow and widowed. |
| Date of anniversary | Optional  | The date of anniversary is selected if the employee got married. |
| Nationality | Optional  | In-built, Indian is presented |
| Permanent state ID | Optional  | The state of the employee is selected. All the states are mentioned in the drop down list. |
| City | Optional  | The city of the employee is selected. All the cities in the India are presented in the drop-down. |
| Pin-code | Optional  | The pin code of the employee lives in is entered |
| Attachment for document | Optional  | The file is uploaded if any documents or proofs presented by the employee |
| Present address | Optional  | The present address of the employee is entered |
| Permanent address | Optional  | The permanent address of the employee is different from the present address is entered. If it is the same as presented address, then select the button above “same as present address”.  |
| Personal contact number | Optional  | Personal contact number of the employee is entered |
| Personal email ID | Optional  | Personal e-mail ID of the employee is entered |
| Aadhar card number | Optional  | The aadhar card number of the employee is entered |
| Pan number | Optional  | The pan number of the employee is entered |
| Driving license number | Optional  | The driving license number of the employee is entered |
| Driving license expiry date | Optional  | The driving license expiry date is selected |
| Gratuity number | Optional  | The gratuity number of the employee is entered |
| Passport number | Optional  | The passport number of the employee is entered |
| Physically handicapped | Optional  | The radio consists of 2 options I.e., yes or no. If the employee is physically handicapped, then the yes is selected. If not, no is selected |
| On roll type | Mandatory | The drop down consists of * Non muster
* Muster
* Professional
* Management

Non muster refers to temporary or probation.Muster refers to permanent employees.Professional refers to consultant, auditor etc who will be paid for the particular role.Management refers to the higher employees. |
| Type of employment  | Optional  | The drop down consists of* Skilled
* Semi-skilled
* Unskilled
 |
| PT applicable | Optional  | PT refers to professional tax.The drop down consists of yes or no.If the employee is applicable, then yes is selected, if not, no is selected. |
| Salary template | Mandatory | There are different options in the salary template. The salary template is selected to which the employee is belonged. |
| Gross  | Mandatory | The gross amount of the employee is entered |
| Variable pay | Mandatory | The variable pay of the employee is entered |
| Net/ take home | Mandatory | The net/ take home of the employee is entered |
| CTC | Mandatory | The CTC refers to cost to company.The CTC of the employee is entered. |
| Basic | Mandatory | The basic amount of the employee is entered |
| DA | Mandatory | DA refers to dearness allowance.The DA amount of the employee is entered. |
| HRA | Mandatory | The HRA refers to house rent allowance.The HRA amount of the employee is entered. |
| Conveyance allowance | Mandatory | The conveyance allowance refers to transport allowance provided to the employee by the employer.The conveyance allowance amount of the employee is entered. |
| Medical allowance | Mandatory | The medical allowance of the employee is entered |
| Other allowance | Mandatory | The other allowances if any of the employee is entered |
| Employer PF | Mandatory | PF refers to provident fund.The employer PF number of the employer is entered |
| Employer ESIC | Mandatory | ESIC refers to Employee’s state insurance cooperation.The Employer ESIC of the employer is entered |
| Employee PF | Mandatory | The employee PF number of the employee is entered |
| Employee PT | Mandatory | The employee PT of the employee is entered |
| Employee ESIC | Mandatory | The employee ESIC of the employee is entered |
| Annual CTC | Mandatory | The annual CTC of the employee is entered |
| Bank name | Optional  | The bank name of the employee is entered |
| Bank account no | Optional  | The bank account number of the employee is entered |
| IFSC code | Optional  | IFSC refers to Indian Financial System code.The IFSC code of the employee’s bank is entered. |
| Bank branch name | Optional  | The bank branch name of the employee is entered |
| PF number | Optional  | The PF number of the employee is entered |
| PF nominee | Optional  | The PF nominee of the employee is entered |
| ESIC number | Optional  | The ESIC number of the employee is entered |
| ESIC nominee | Optional  | The ESIC nominee of the employee is entered |
| UAN number | Optional  | The UAN refers to universal account number.The UAN number of the employee is entered. |
| Official mail ID | Optional  | The office mail id of the employee |
| Office mobile number | Optional  | The office mobile number of the employee, if any, is entered |
| Emergency contact number | Optional  | The emergency contact number of the employee in case of absentee  |
| Highest qualification | Optional  | The highest qualification of the employee is entered |
| University  | Optional  | The university in which the employee graduated is entered |
| Passing year | Optional  | The passing year of the particular course of the employee is entered |
| Grade  | Optional  | The grade achieved in that course of the employee is entered |
| Previous company | Optional  | The previous company of the employee is entered, if the employee has any experience |
| Previous designation | Optional  | The previous designation of the employee is entered |
| Experience  | Optional  | The past experience of the employee is entered |
| City | Optional  | The city in which the employee employed is selected.The drop down consists of all the cities in the India. |
| From date | Optional  | The date from which the employee started working initially is entered |
| To date | Optional  | The last date in which the employee employed previously is entered |
| Relation  | Optional  | The relation of the person with the employee is selected.The drop down consists of list of all the relations. |
| Full name | Optional  | The full name of the family member is entered |
| DOB | Optional  | The date of birth of the family member is entered |
| Aadhar number | Optional  | The aadhar number of the family member is entered |

**Leave management:**

The leave management consists of the following

* Leave application
* Leave balances
* Calender
* Manage compensatory off

**Leave application**

The leave application is used to apply leaves and for the approval.

The leave application consists of the following fields

* Application date
* Leave type
* Start date
* End date
* Days
* Approval by team lead
* Approval by HR
* Status

|  |  |
| --- | --- |
| **FIELDS** | **DESCRIPTION** |
| Application date | The date on which the leave applied |
| Leave type | The type of leave |
| Start date | The date on which the leave starts |
| End date | The date on which the leave ends |
| Days  | The number of days of leave  |
| Approval by team lead | The check box for team lead approval |
| Approval by HR | The check box for HR approval |
| Status | The status of the leave whether pending or completed |

**Application for new leave**

The application for the new leave is presented in the leave application menu.

The following are the fields in the application for new leave menu

* Application date
* Leave type
* Date from
* Date to
* Resume on
* Leave days
* Leave balance
* Reason

|  |  |  |  |
| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE**  | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| Application date | Auto-generated | -  | The date on which the apllication is applied. The date is auto-generated. |
| Leave type | Drop-down | Mandatory  | The type of leave is selected from the drop down menu.The drop down consists of options such as * Common leave
* Compensatory off
* Compassionate leave
 |
| Date from | Calender  | Mandatory  | The date on which the leave starts |
| Date to | Calender | Mandatory  | The date on which the leave ends |
| Resume on | Auto-generated | - | The resume date is automatically generated when the end date of the leave is selected |
| Leave days | Auto-generated | - | The number of days of leaves is automatically generated |
| Leave balance | Auto-generated | - | The leave balance is automatically calculated. The leave balance is fetched from the leave balance menu |
| Reason | Text  | Mandatory | The reason for applying the leave is entered |
| Submit  | Button  | Optional  | To apply for the leave |
| Cancel  | Button  | Optional  | To cancel the application |

**Leave balances**

The leave balances menu consists of the leaves left in the particular period.

The leave balances consists of the following fields

* Opening
* Accrued
* Availed
* Pending
* Lapsed
* Balance

|  |  |
| --- | --- |
| **FIELDS** | **DESCRIPTION** |
| Opening | The opening balance which carried from the previous year |
| Accrued | The leaves accrued in the current period |
| Availed | The total number of leaves used in the current year |
| Pending | The total number of leaves applied and not yet taken in the current year |
| Balance  | The total balance (opening+accrued-availed-pending) |

**Calender**

The calender can be viewed in color format where it can different sessions such as

* Presented days
* Accrued leave days
* Pending leave days
* Week-offs
* Extra days worked for encashment

The HR, IT head and the admin should view the calender format in such a way, the employees on leave on that particular date in a format so that it can be useful to plan the leaves and work accordingly.

The team leads can view the leaves of the employees in their particular team.

**Manage compensatory off**

The manage compensatory off menu is used to avail the compensatory leave which can be converted to earned leave or the leave encashment.

The following are the fields in the compensatory off

* Application date
* Worked on
* Application for
* Approval from team lead
* Approval from HR
* Status

|  |  |
| --- | --- |
| **FIELDS** | **DESCRIPTION** |
| Application date | The date on which the compensatory off is applied |
| Worked on | The date on which extra worked |
| Application for  | The application for the extra leave or for the leave encashment |
| Approval from team lead | The check box for team lead approval |
| Approval from HR | The check box for HR approval |
| Status | The status of the compensatory off whether approved or pending |

**Application for compensatory off**

The application for applying the compensatory off.

The following are the fields in the application for compensatory off.

* Application date
* Worked on
* Full day or half day
* Applied for
* Submit
* Cancel

|  |  |  |  |
| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE**  | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| Application date | Auto-generated | - | The date on which the compensatory off is applied and it is auto-generated |
| Worked on | Calender  | Mandatory  | The date on which extra worked have to be selected |
| Full day | Check box | Mandatory  | Whether the worked for the full day or half day.If it is full day, the check box has to be selected. |
| Applied for | Drop down | Mandatory  | The drop down consists of * Extra leave
* Leave encashment

Extra leave when they need an additional leaveLeave encashment is when the employee wants to encash the leave. |
| Submit | Button  | Optional  | To apply for the compensatory off |
| Cancel  | Button  | Optional  | To cancel the application |

**GENERATE SALARY**

Generate salary can generate the report of the particular branch, role or employee in a particular period.

The generate salary page consists of following fields.

* Select branch
* Select role type
* Select month and year
* Select employee

|  |  |  |  |
| --- | --- | --- | --- |
| **FIELDS** | **INPUT TYPE**  | **MANDATORY/ OPTIONAL** | **DESCRIPTION** |
| Select branch | Drop-down | Optional  | To select the branch |
| Select role type | Drop-down | Optional  | To select the role type |
| Select month and year | Calender  | Optional  | To select the month and the year |
| Select employee | Drop-down | Optional  | To select the employee |
| Generate  | Button  | Optional  | To generate the report |
| Reset  | Button  | Optional  | To reset the selected filters |

The following report is generated in the following format.



**IMPORT SALARY**

Import salary is used to import the salary details of the employee.

Import salary page consists of the 2 fields such as

* Export format
* Import salary

Export format consists of the following fields.

* Employee name
* Employee id
* Bank account
* Present days
* Basic
* DA
* HRA
* Others allowances
* Attendance allowances
* Incentive
* Arrears
* Conveyance
* Medical allowance
* PF
* PT
* ESIC
* Other deduction
* Advance
* Canteen deduction
* MLWF
* TDS
* Gross
* Total deduction
* Net salary
* Remark

The calculation for the excel sheet is as follows.

Payroll Formulas

-------------------------------------------------------------

Leave Encashment(gross) -

gross / 26 \* 1.5

--------------------------------------------------------------

HRA (basic,da,leave\_encashment,gross) -

max\_hra, min\_hra : based on config template(hrms\_payroll\_config\_template)

if (gross > (basic + da + leave\_encashment)) {

 if ((gross - (basic + da + leave\_encashment)) >= round(((basic + da) \* maxHRA / 100), 0)) {

 $newHra = round((($basic + $da) \* $maxHRA / 100), 0);

 } else {

 newHra = (gross - (basic + da + leave\_encashment));

 }

} else {

 newHra = round(((basic + da) \* minHRA / 100), 0);

}

if(newHra < round(((basic + da) \* minHRA / 100), 0))

{

 newHra = round(((basic + da) \* minHRA / 100), 0);

}

if(newHra > round(((basic + da) \* maxHRA / 100), 0))

{

 newHra = round(((basic + da) \* maxHRA / 100), 0);

}

-----------------------------------------------------------------

Conveyence(basic,da,hra,gross) -

Conveyence : based on config template(hrms\_payroll\_config\_template)

if (gross >= basic + da + hra) {

 if ((gross - (basic + da + hra)) >= Conveyence) {

 Conveyence\_calc = Conveyence;

 } else {

 Conveyence\_calc = (Gross - (basic + da + hra));

 }

}

else

{

 Conveyence\_calc = 0;

}

---------------------------------------------------------------------

MedicalAllowance(basic,da,hra,Conveyence,gross) -

if (gross >= (Basic + DA + HRA + Conveyence)) {

 if ((Gross - (Basic + DA + HRA + Conveyence)) >= 1250) {

 MedicalAllowance = 1250;

 }else {

 MedicalAllowance = (Gross - (Basic + DA + HRA + Conveyence));

 }

} else { MedicalAllowance = 0 }

----------------------------------------------------------------------

OtherAllowance(Basic,DA,HRA,Conveyence,MedicalAllowance,gross) -

if(gross - (Basic + DA + HRA + Conveyence + MedicalAllowance) > 0) {

 Other = gross - (Basic + DA + HRA + Conveyence + MedicalAllowance);

} else { Other = 0 }

-----------------------------------------------------------------------

ESICAndPT( basic,da,hra,other\_conveyence,conveyence\_allowance ,medical\_allowance,Leave\_Encashment,current\_branch,Muster\_type,PTApplicable,is\_female) -

MaxGross = basic + da + hra + other\_conveyence + conveyence\_allowance + medical\_allowance + Leave\_Encashment;

MaxESICApplicableLimit,EmployeeESIC,EmployerESIC : based on config template(hrms\_payroll\_config\_template)

if (MaxGross >= MaxESICApplicableLimit) {

 EmployeeESIC = 0;

 EmployerESIC = 0;

}

else {

 EmployeeESIC = MaxGross \* EmployeeESIC / 100;

 EmployerESIC = MaxGross \* EmployerESIC / 100;

}

if (PTApplicable == 0 || basic == 0) {

 PT = 0;

}

else {

 if (basic<>0) {

 if (IsFeb == true) {

 pt = "pt\_amt\_feb" based on config template(hrms\_payroll\_pt\_config depend on is\_female yes or no);

 } else {

 pt = "pt\_amt" based on config template(hrms\_payroll\_pt\_config depend on is\_female yes or no);

 }

 }

}

---------------------------------------------------------------------------------------------------------

Pf(basic,da,LeaveEncashment,gross,medical\_allowance,conveyence\_allowance,other\_conveyence) -

MaxGrossToApplyPFOnLeaveEncashment,employee\_pf,employer\_pf: based on config template(hrms\_payroll\_config\_template)

 if(basic + da <= MaxGrossToApplyPFOnLeaveEncashment)

{

 tempGross = basic + da + medical\_allowance + conveyence\_allowance + other\_conveyence;

 if(tempGross >= MaxGrossToApplyPFOnLeaveEncashment)

 {

 tempGross = MaxGrossToApplyPFOnLeaveEncashment;

 }

}

else

{

 tempGross = MaxGrossToApplyPFOnLeaveEncashment;

}

EmployeePF = round(tempGross \* employee\_pf / 100, 0);

EmployerPF = round(tempGross \* employer\_pf / 100, 0);

--------------------------------------------------------------------------------------------------------------

TakeHome(Basic,DA,HRA,Other,Conveyence,MedicalAllowance,Leave\_Encashment,PT,EmployeeESIC,EmployeePF) -

Earning = Basic + DA + HRA + Other + Conveyence + MedicalAllowance + Leave\_Encashment;

Deduction = PT + EmployeeESIC + EmployeePF;

TakeHome = Earning - Deduction;

---------------------------------------------------------------------------------------------------------------

CTC(Basic,DA,HRA,Other,Conveyence,MedicalAllowance,Leave\_Encashment,variablepay,EmployerESIC,EmployerPF) -

Earning = Basic + DA + HRA + Other + Conveyence + MedicalAllowance + Leave\_Encashment + variablepay;

Deduction = EmployerESIC + EmployerPF;

CTC = Earning + Deduction;

-------------------------------------------------------------------------------------------------------------

annualCTC(CTC)-

 annualCTC = CTC \* 12;

 ----------------------------------------------------------------------------------------------------------