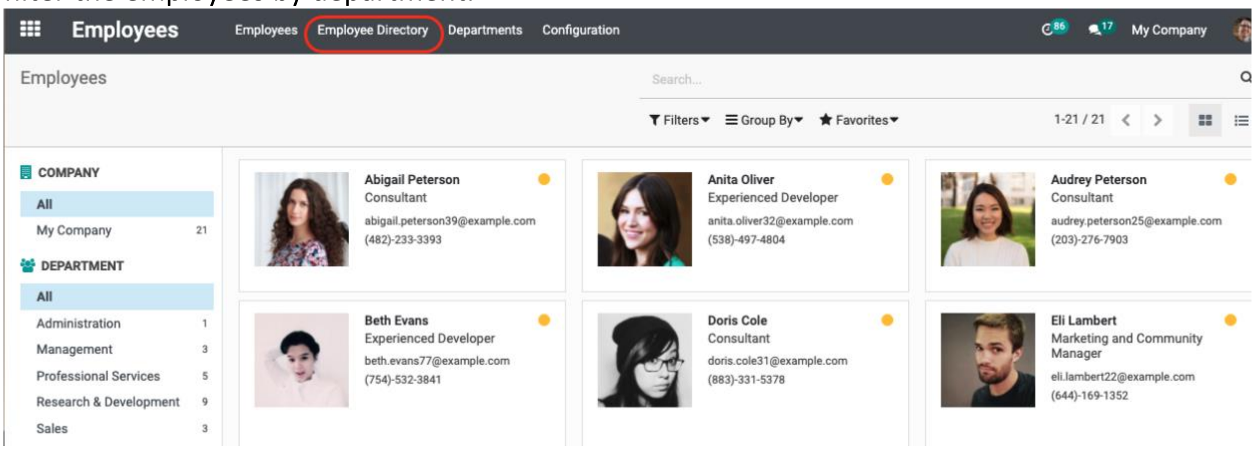
Table of Contents

Employees Module

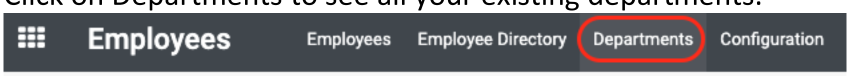
1. Employee Directory

Click on Employee Directory to see all your existing employees. On the left side you can also filter the employees by department.

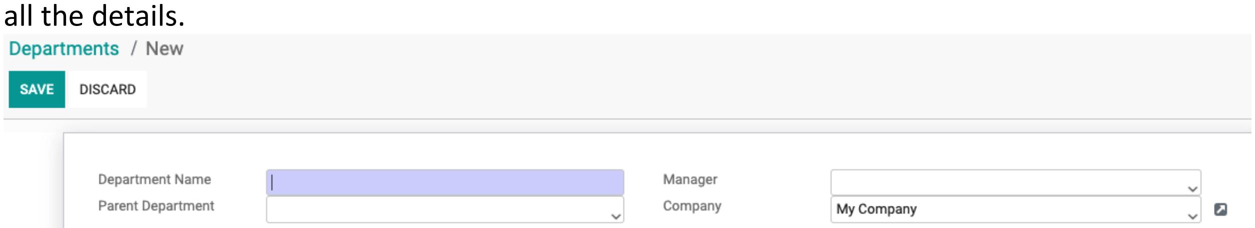


2. View/Create a new department

Click on Departments to see all your existing departments.



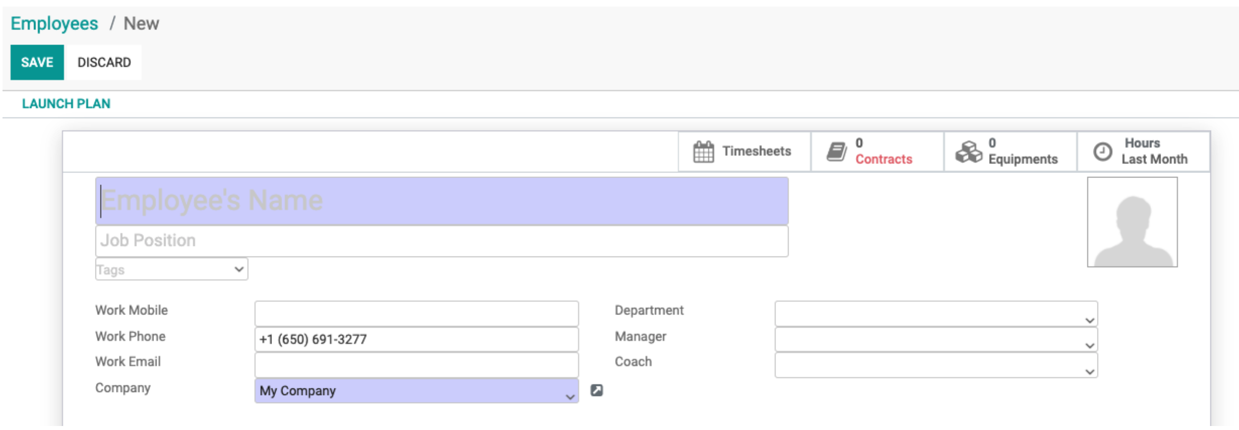
If you want to create a new department click on the **Create** button. Insert the information such as department name, parent department, manager and company. Click on **Save** after inputting all the details.



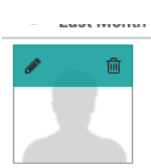
3. Create a new employee

Go to the Employees module and click on **Create**.

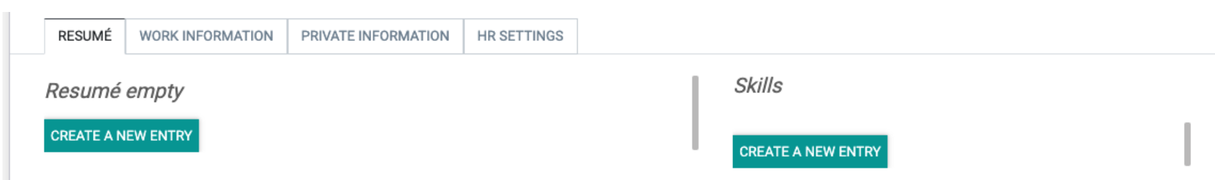
The first section will include the employee's basic information. Such as employee name, job title, contact information, department, manager and coach. Insert the employee's basic information such as Name, Job position, tags, contact information, his/her department, manager and coach (can only select after you have created the relevant employees/users).



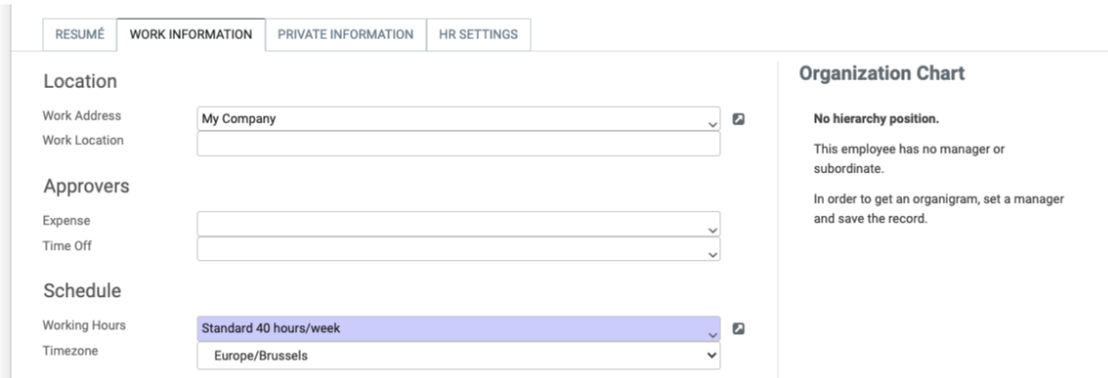
If you want to upload your employee's photo, click on the human figure image and click on the pencil to update the profile picture.



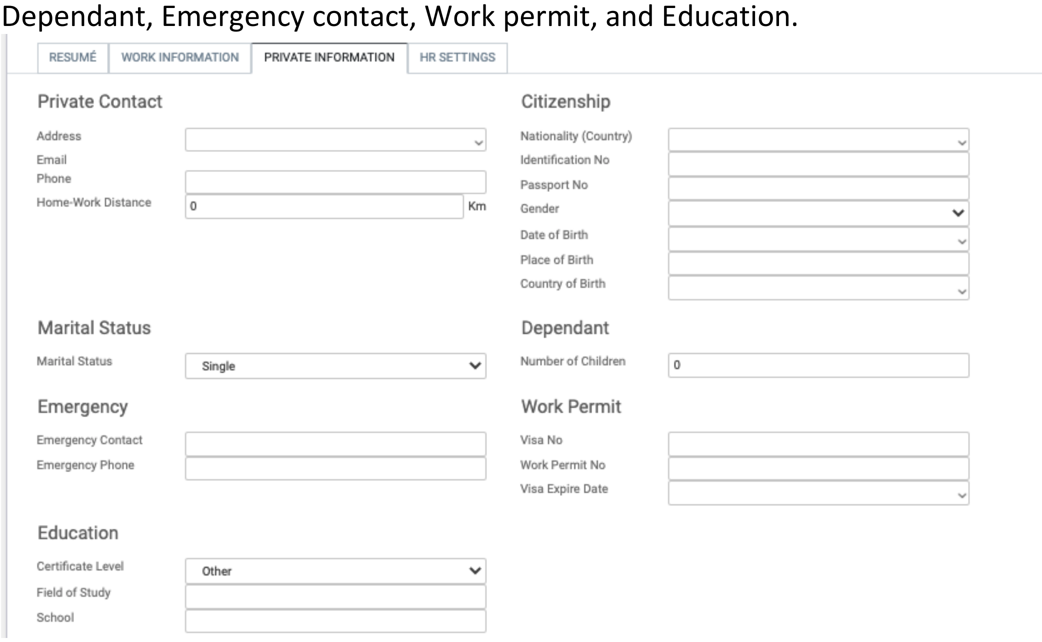
In the first tab **Resumé** you can add the employee's resumé and skills by clicking on the **Create a new entry** button.



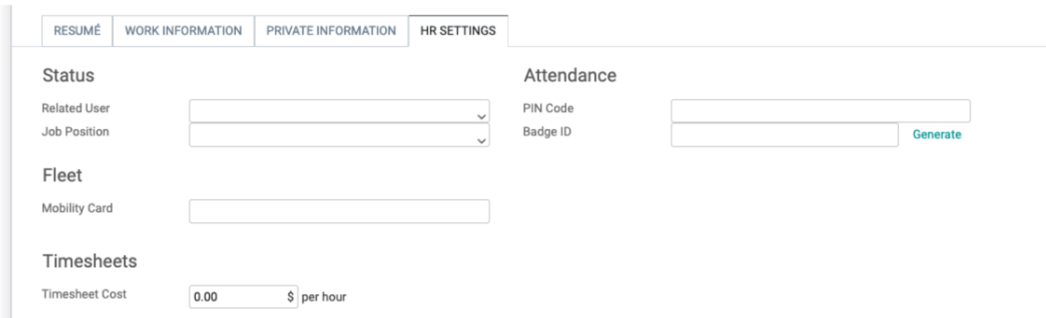
The next tab **Work information**, you can insert information such as the Location where the employee works at, select the Approvers for Timesheet, Expense, Time off, working schedules, and time zone. If a manager is selected in the first section it will appear in the Organization Chart after the employee form has been saved. Once you have selected the default approvers in the employee page, whenever this employee applies for relevant actions (expense, time off etc.) in the relevant module, it would automatically fill in the approver/manager as the one you set here.



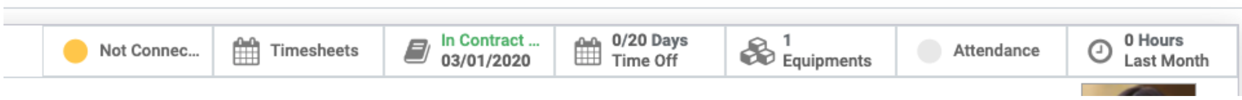
If you would like to add the employee's private information you can click on the **Private information** tab and add details such as Private Contact details, Citizenship, Marital Status, Dependant, Emergency contact, Work permit, and Education.



In the **HR Settings** tab, if this employee also has a user license in the system, the most important part is to select "Related User", and select the 'user name' which should be linked with this employee. By doing so, this Employee will be recognized as the user you have selected. If you haven't already done so, you can go to the guide for setting up users, then after you set it up you can link it with this employee. Thereafter, you can insert all the details such as the status of the date of the first Contract, Attendance, Fleet, and timesheets (if applicable).

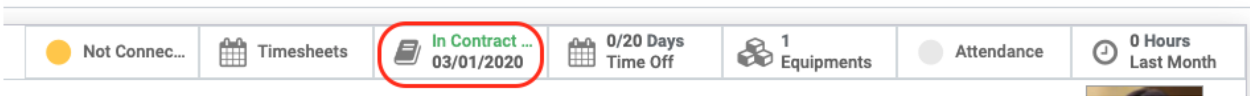


After inserting all the information click on the **Save** button to create a new employee. Thereafter the summary of this employee will be shown on the top banner, such as the status of the Timesheet, Contract, entitled number of leaves, equipment, attendance, attendance summary.

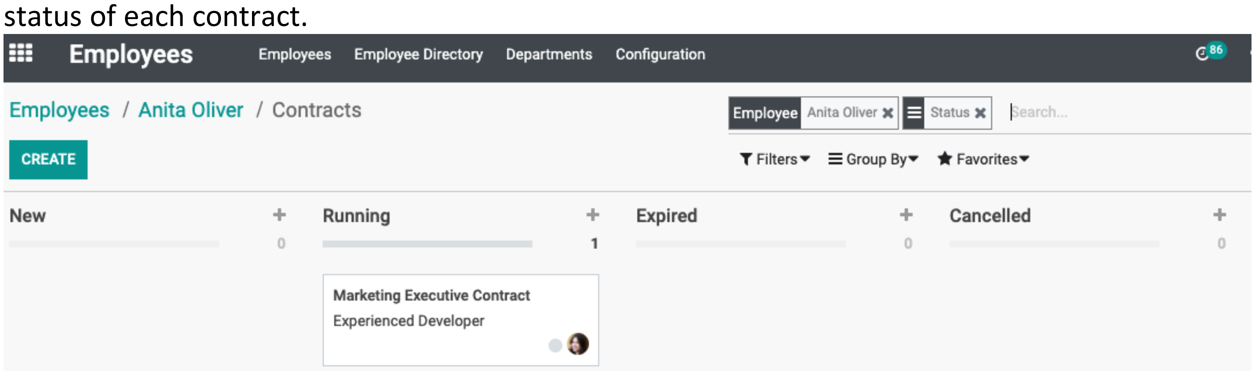


4. View/Edit/Create employee's contract

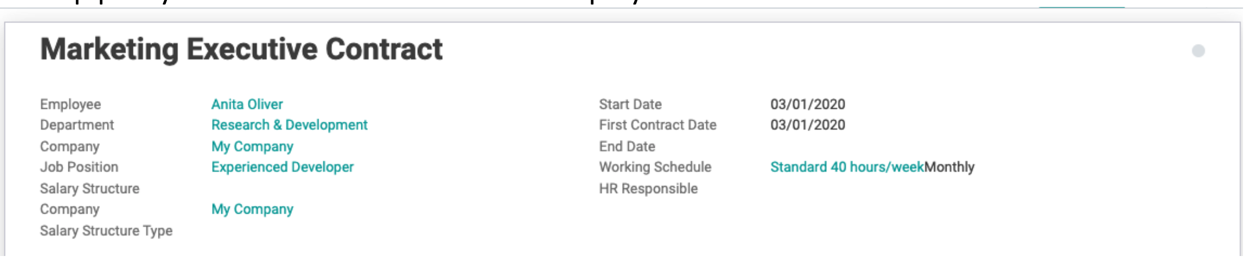
To view the employee's contract click on the Contract button that appears at the top banner.



In this page you will get an overview of all the contracts that are under the employee and the status of each contract.

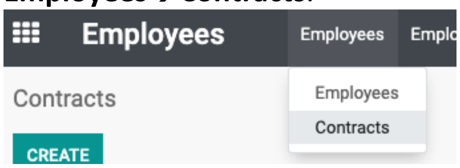


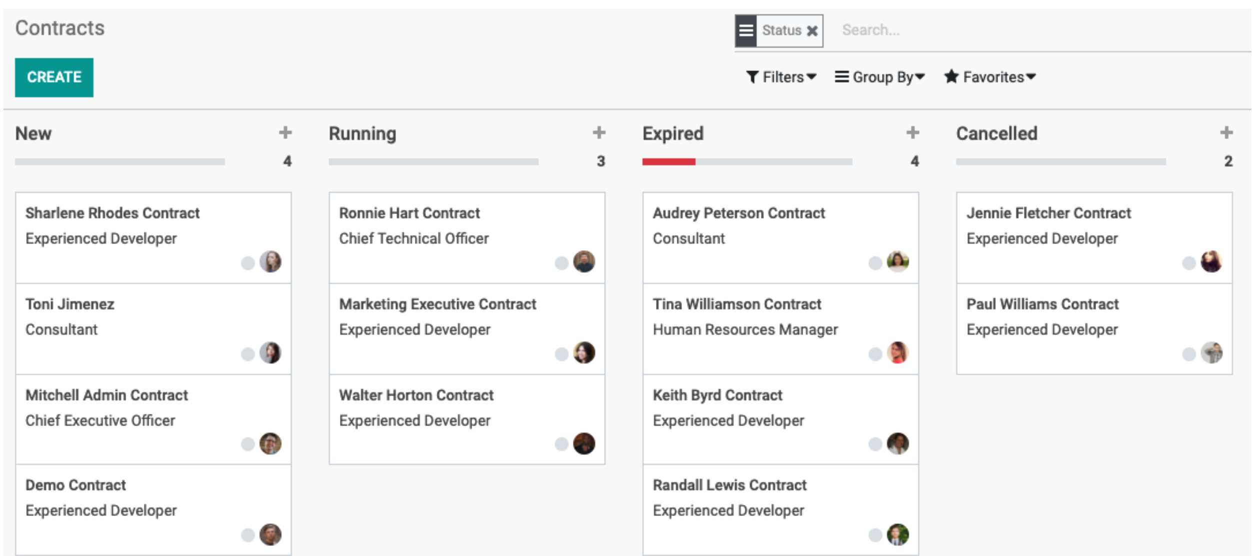
Click on the contract to view and edit the details or click on Create to create a new contract. At the top part you can see the details of the employee and also the details of the contract.



Click on the **Salary information** tab to see the monthly advantages in cash and yearly advantages.

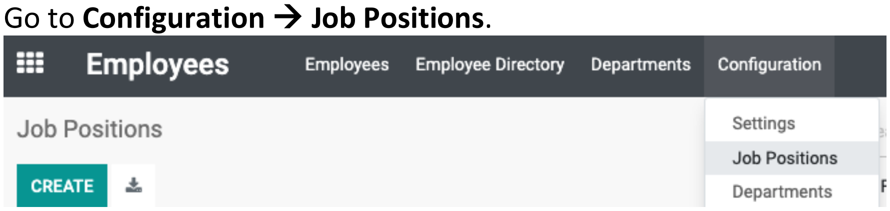
To have an overview of all your employees' contracts by different stages you can also click on **Employees→Contracts**.



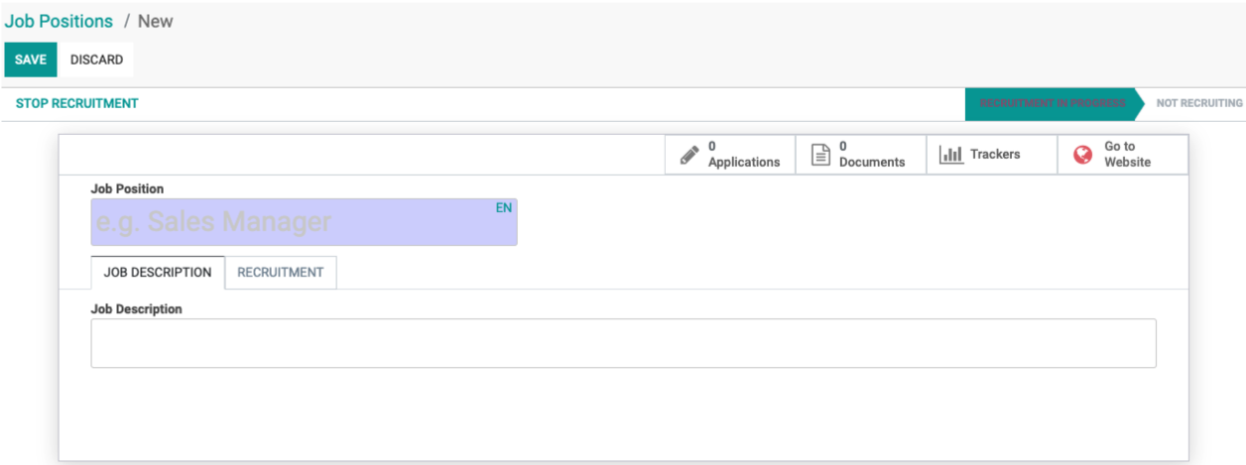


5. Create job positions

Go to **Configuration → Job Positions**.



All the existing job positions will be listed, if you want to create a new position click on **Create**. Insert the job position and add a job description. Once you have created the job position, it will be available for selection when you create an employee, and have to select their corresponding position. If you do not have an existing employee for the position, it will also be useful for you to manage your recruitment needs.



Go to the recruitment tab, select the department, and add the expected new employees number.