

HRMates Workflows

Attendance Workflow

Enter Attendance

- Pull from Attendance Device or Database
- Upload Attendance as CSV file
- Manually Update Attendance

Mark Attendance as Completed

HRMates Generated Notifications for Attendance Mismatch

- Extra Attendance - Employee Present on Leave or Holiday or Week off
- Missing Attendance - Employee Absent, but not on Leave and No Holiday and No Weekly Off

HRMates is configured to match the organization policy for Leave, Holiday and Week offs allowing HRMates to accurately determine Employee Present Status for all days

Resolve Attendance Mismatch Notifications

- Apply Leave
- Add Holiday
- Correct Roster
- Correct Attendance

Timesheet Workflow

Create Project and Tasks
Add Employees to Tasks
Optionally Link Project to Client, Add Expected Time

Configure Auto Timesheet without Task

Timesheet Duration Configuration

- Weekly
- Weekly with Month cutoff
- Monthly

HRMates automatically creates TimeSheets for all employees
Employees fill hours and work for each day for each task

On Task Finish Employee enters Finish Date

Employees submit timesheet for Approval

Approvers receive notification for Approval

Admin can pull or Client wise timesheet reports

Payroll Workflow

Checklist before Payroll Generation

- All New Employees Added in System
- All Employees who have left made Ex-Employee
- All CTC updated
- All Tax Deductible Entries are done by Employees and Approved
- All Leave Without Pay Entries are done
- Advance Entries are Done
- Reimbursable CTC components are updated by Employees
- Lost Asset Recovery Amounts are added

Requirement for Payroll Generation

- All Attendance Notifications Resolved

Generate Payroll for the Month

- Based on Policy the Payroll may be generated as Groups. Following will be done for each group independently

Resolve Salary Marked as Check

- Re-Check Full and Final
 - Status Changed
 - Resolve Missing and Extra Notifications
- Move Salaries to be delayed to new Group
Add Deductions, One time payments like Bonus Arrears etc

Submit for Approval

- Approver get a Salary Approval Notification

Approvers Approve or send back for changes

Admin Downloads

- Salary by Bank Transfer Advice
- Salary by Check Statement
- PF, ESIC, TDS, Gratuity Statements
- Account System Entries
- Printable Salary Slips

Employees

- View Salary Slip
- View TDS Calculation Slip

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Roster Workflow

Monthly Rostering

SETUP

In Settings:Roster:Shifts add Shifts, Editors and Approvers
Define roster groups in Permission:Roster Permissions
Request HRMates support to map Employees to groups

Editors and approvers will see *Roster Management* menu item.
Open *Roster Management* select Month and Group.
It will show employees in the Group
Select Employee and click *Modify*

Define Roster using

- Monthly with Weekly Off
- Monthly with Shift for Weekday
- Date Shift
- Date Off

Submit Roster for Approval
View Roster Sheet will show complete roster for the month

Employees will see Approved Roster in *My Roster*

Adhoc Rostering can be done using Leave Type WeekOff

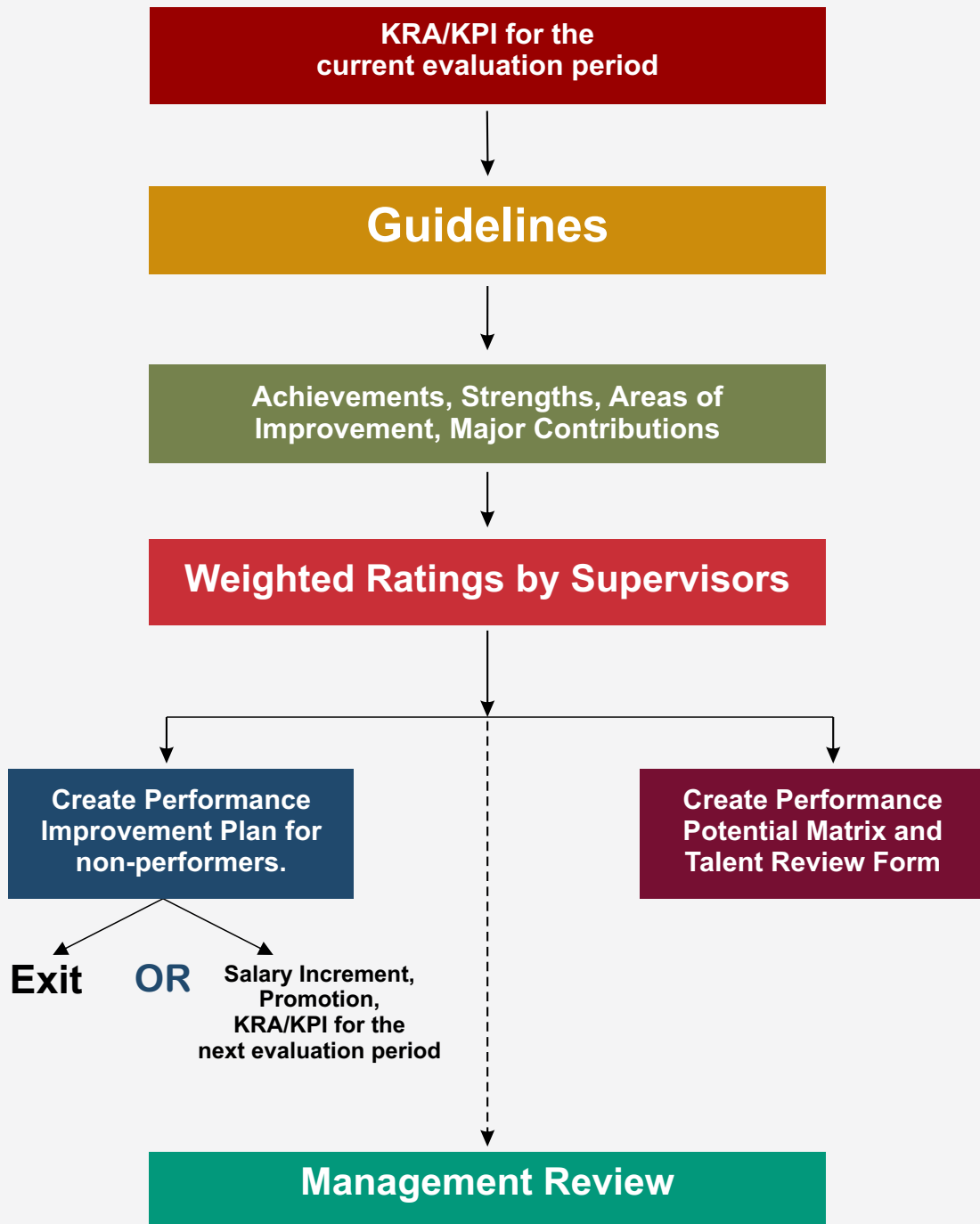
Adhoc Rostering

Request HRMates support to enable *Week Off* leave for employees under Adhoc Rostering

Weekoff leave type entitlement restarts every month.
Remaining Balance at end of the month is carried forward as Comp Off

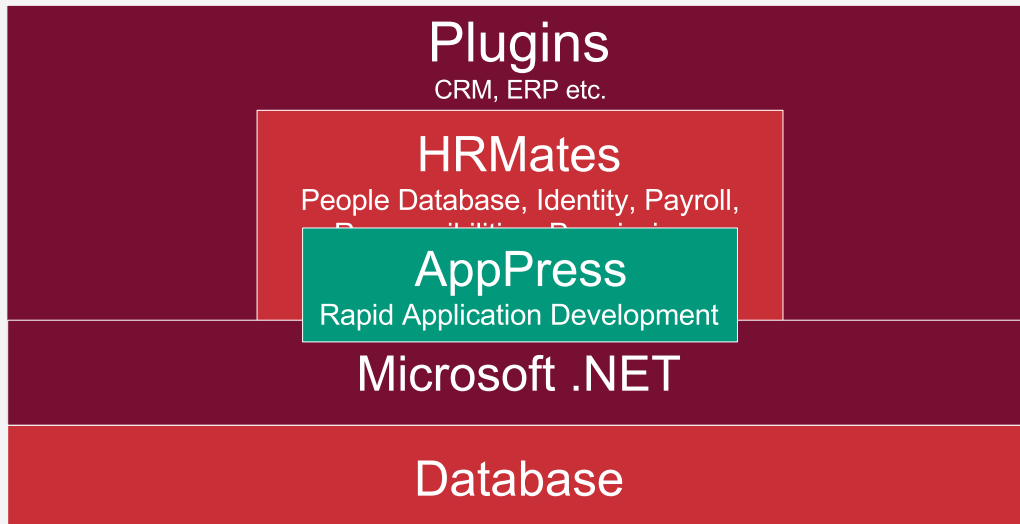
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HRMates PMS Workflow



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HRMates Plugin Architecture

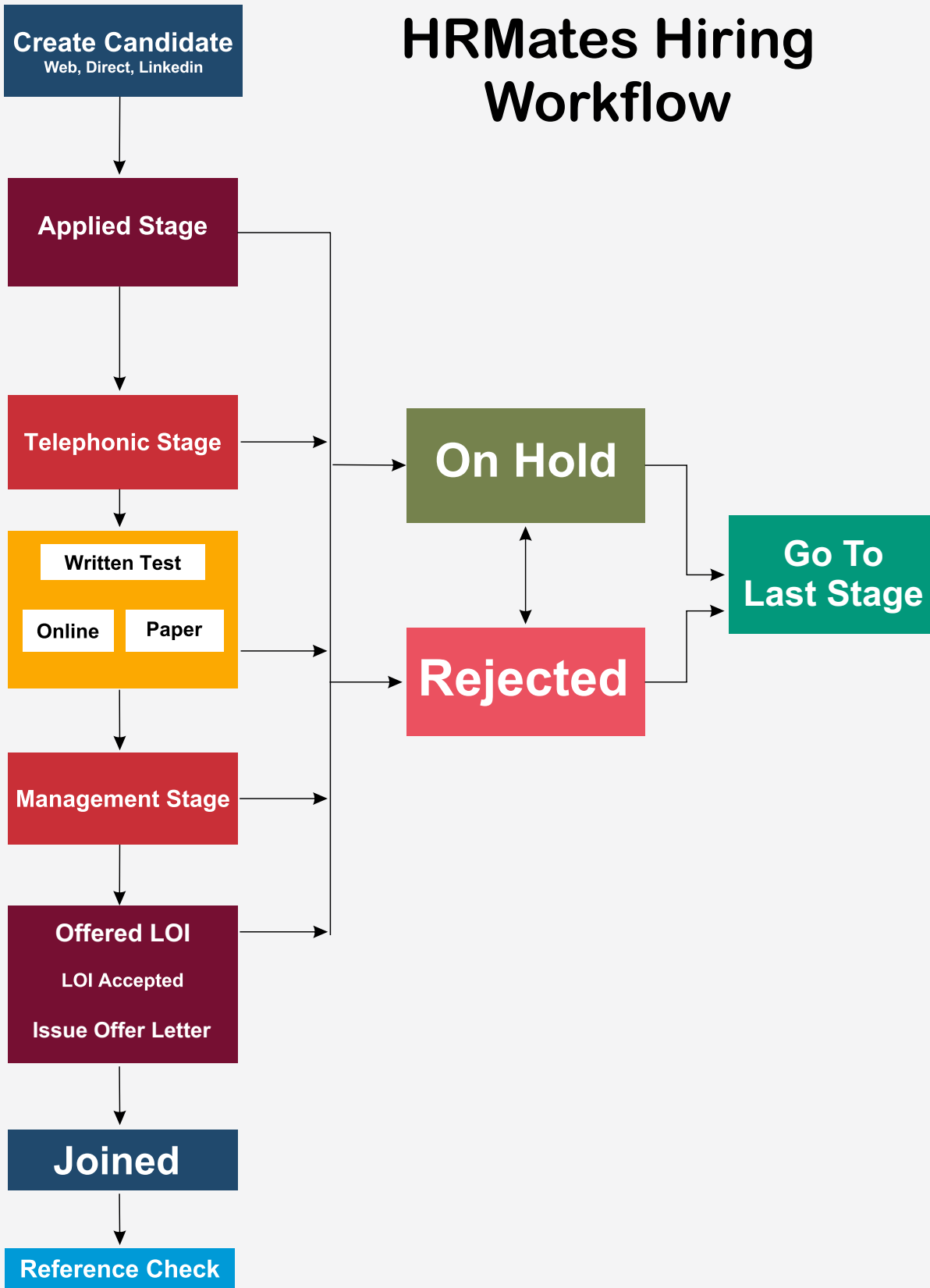


HRMates Vacancy Management



HRMates Workflows

HRMates Hiring Workflow



Learning Management Workflow

- **Prepare Survey**
 - Training Description
 - Proposed Dates
 - Add Eligible Employees
- **Survey**
 - Employees get Notification for Intent
- **Monitor Survey**
- **Schedule**
 - Employees get Notification for Training Date
- **Feedback**
 - Employees get Notification for Feedback
 - Training gets added to Employee Profile
- **Monitor Feedback**

- **Training Need Identification**
- **Scheduling**
- **Pre Post Test, Learning Index,**
- **Feedback, Effectiveness Index,**
- **Training Material Repository**