



HRMates Case Studies

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Attendance Case Study 1

Customer Profile

Its a real estate company with many employees on Field Duty

Special Requirements

- Attendance Regularization Process with rules for number of working days allowed for regularization.
- If Employee Leaves after 8:30 in the evening next day he can come 1 hour late. If leaves after 9:30 next day he can come 2 hours late.
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- Attendance to be imported from biometric machines at multiple offices
- Some Employees do not need attendance monitoring, some need monitoring but penalty rules not applicable.

Solution

- Attendance Regularization process was setup with an approval workflow.
- Attendance Penalty Rule Custom Process was modified to update shift timings of next day on Late Going.
- Attendance Import Process was setup for multi locations. Auto Warning Emails generated for following cases
 - Monitored Employee in HRMates Database not available in Punch Machine
 - Attendance not coming from a location for a full day
- Special Attendance Grades were set up in Employment Profile and used in Attendance Process

Change Management

- After First Round Implementation several changes were requested by clients and most changes were addressed within 1 working day

Attendance Case Study 2

Customer Requirements

The customer is a Law firm spread across several cities in the country. Owing to Covid-19 restrictions, they need to implement an Office Duty and Work From Home policy for employees across the multiple locations to allow work from home as well as maintain a critical strength within the office. The policy mandates

- On each work day, 30% of employees need to work from office. A roster will be maintained for a period (1 week or longer as decided by management) to group employee that are to work from office in that period, the others to work from home
- Within each location, the Location Head will be responsible for creating employee attendance groups and the roster for each period in advance
- Employees that are marked for work from home for a period may attend office in person in case of an emergency. The permission for that is to be obtained from the location head in advance, who will then plan for an alternate to work from home on that day
- For employees that work from office, the normal biometric will be used for attendance to mark time in and time out.
- For the employees working from home, the employee needs to inform their start and end time for each work day to the location manager. This may be done by email or an alternate system as defined by the firm
- On each work day, a 1 hour lunch break time is provided for all employees, including those that are WFH
- WFH Employees can also request for short leaves, not exceeding 2 hours, for a personal need. The location head's decision in this matter is final
- In one month an employee may at most avail of 2 short leaves
- During the work day, each employee needs to capture their timesheet giving details of clients, projects and activities they are spending time on. The list of activities is defined as a standard list of Tasks. Each employee is assigned to one or more tasks

Solution

- The solution has multiple dimensions to it. These include
 - Roster management
 - Attendance management
 - Short leave management
 - Timesheet management
- Roster management
 - HRMates provides a facility to create groups of employees by location and/or manager
 - The manager for each location (or group) has the ability to create rosters for each employee. Rosters can be made for shifts, or locations or a combination of either. For the law form, home shift was created as a separate shift "WFH Shift" so the manager was able to create rosters for each week identifying office or home shifts for each employee for the week

- Validation was setup to to restrict ratio of Work From Home and non Work from Home shifts to be between 25% to 35%
- Each employee could look at their roster before start of the week and plan accordingly
- Attendance Management
 - HRMates has the functionality to mark attendance using mobile app. Each employee can mark a time in (or Punch in) – the system records the time and GPS coordinates and address of the employee.
 - Similarly Time out (Punch out) is also recorded using mobile application
 - For employees working from office, HRMates integrates with the biometric system to mark the attendance.
 - For Audit Purpose Mobile Attendance (WFH) is matched with the WFH shift
- Short leave management
 - This is defined as a leave category within the vacations module. The employee can apply for a short leave for a work day, its at the discretion of the location/manager to approve
 - For each day, total time of attendance + any short leave on that day should total the work hours needed for the day to be marked present. Else that day is marked as half day leave
 - The system tracks number of short leaves taken in the same month and allows max of 2 in a month
 - Short leave does not carry over to the next month if not availed
- Timesheet management
 - HRMates has a projects module to identify each project for each customer
 - Each employee can be allocated to 1 or more tasks
 - For timesheet, HRMates allows either of 2 methods – time reporting or time accounting
 - Time reporting
 - For each attending day, the employee records the number of hours worked on a task on a project for that day. Multiple tasks can be reported each day
 - List of tasks that an employee can work on are predefined in the system – so they can be selected from a drop down
 - The manager approves the time reported and the data is then frozen and can be used by accounting for billing
 - Time accounting
 - The manager of each project defined the activities that are to be done on that project and also gives a budget of effort needed for that activity
 - The employee selects the activities that are assigned to him and reports effort on those
 - The employee also reports the effort left to complete the task
 - The system tracks effort spent vs effort budgeted to identify the percentage completion
 - Using the effort balance the system also tracks over or under budget tasks

Service Oriented Organization

Customer Profile

The organization has Head Office and more than 30 branch offices across india. Company deals with Medical Sample Collection. All HR and Payroll are managed from Head Office.

Special Requirements

- Need flexible week off for Phlebologist.
- Leave Entitlement and Holidays are assigned as per policy of the State in which the office is located. IT Team has 5 days working, Operations team has 6 days working with 3 Shifts, rest of the organization has 6 days working.
- Rosters are created by Team Manager and Approved by Head of Operations. During Roster creation HRMates provides visibility for leaves applied by Roster Employees. Once Roster is approved the employees can see there roster schedule using My Roster.
- Further Employees can apply for Shift Exchange. Shift Exchange is approved by exchange Employee's Team Manager and HOD. After approval the Updated Roster is visible in My Roster.
- Electronic Acceptance of Employment Terms and Conditions
- Contract Workers Invoicing
- Contract Workers Employee Code has different Prefix

Solution

- Attendance and Salary were grouped by Locations
- Created Flexible Week off policy as per requirement
- Roster Module was setup for the company along with approval rules
- Terms and Conditions feature was setup for the company along with requirement for new employees to download documents and upload a signed copy, further approved by HR.

Change Management

- If a Employee or Manager location or area of operations are changed it is automatically reflected in the system as system as been setup based on Rules and Organization Structure.
- If a uploader leaves organization, system will force a replacement.
- Any Other Change can be easy be accomplished in the calculator logic.

Future Roadmap

Auto run Data Import Process to pull Sales Data automatically from Sales System. This will be done after the Sales System is ready with API for Data Export.

PMS Case Study

Customer Profile

A Steel Company in Jamshedpur, with offices across india.

Special Requirement

- Company has a ready Paper/Excel based Performance Management System.
- Company wants to automate the same system with some changes
- There will be 3 PMS Types. HODs, Officers and Associates
- Goals will be set by Appraisee and Approved by Reporting Manager and HOD in beginning of Year
- During course of Year Additional Assignments and Special Achievements can be added to PMS Form
- End of Year Appraisal is done with involvement of Employee, Reporting Manager, HOD and Management

Prior System

- Paper and Excel Based

Deficiencies in Prior System

- Lot of Paperwork
- Need Lot of Monitoring

HRMates Solution

- HRMates PMS was setup with 3 Templates.
- Rules to map Templates with Employees were created
- Beginning of Year Goal Setting Activity was kicked off
- Notifications and daily reminders were generated for Goal Setting
- During the Year HR Managed Additional Assignments and Special Achievements
- Appraisal Activity Kicked off at end of financial year.
- HR Generated Talent Review Forms after end of Appraisal Activity
- Management used Talent Review Form for Promotions and Increments

Employee Data Case Study

Customer Profile

Mobile Retailer with stores across North India.

Special Requirements

Sales System Generates Sales Data for Every Sales Employee on daily basis. Requirement is

- Publish Sales Data to Employee Portal on Monthly Basis
- Can view Summary and if needed view details
- Store Managers can view their own sales Data and of Store Employees
- Area Manager can view Sales Data for all stores under him
- Sales data for Employees, Store Managers and Area Managers should be presented in their Performance appraisal form
- Incentive generated from Sales Data and added to Employee Salary
- Reminder System to be able to upload data on monthly basis to portal

Prior System

- Data is pulled from Sales System as Excel Sheets
- Calculations are run on excel sheets

Deficiencies in Prior System

- Employees were not able to see their performance data
- Lot of manual work and possibility of errors

HRMates Solution

- Existing Employees Data was imported in HRMates
- HRMates Employee Data Module was setup to create Employee Data Upload Process for 4 kinds of Sales Data Sheets.
- Responsible HR People are assigned to Upload Process for uploading on monthly basis.
- HRMates generates a Notification (on Email and Dashboard) every month
- Uploader uses Notification to upload the Data Sheets
- HRMates generates summary sheet for uploads
- Employees and Managers see the summary sheet along with button to see the details
- PMS Form is setup with columns for Sales Achievement. The Column is bound to have Uploaded Sales data using PMS calculator
- Payroll is setup with Sales Incentive Column
- Sales Incentive Column is bound to have Uploaded Sales Data using Salary Calculator

Multi Country Organization with variations in Policies across Geographies

Customer Profile

Is a global IT services provider with over 2,200 employees delivering technology services from our delivery centres spread across South East Asia and helping our clients improve business competitiveness, efficiency and ROI.

Special Requirements

A HRIS Solution which besides providing regular HR functions should be able to incorporate HR and Payroll policies for our offices in different countries. Further several teams are spread across countries with reporting structure across countries. System should allow managers to perform HR Function across countries.

Solution

HRMates instances were created for each country. The instances were grouped in Organization allowing cross reporting.

Workflows

Customer Profile

Is a Large Company in Indian Steel Industry

Requirements

Wanted to automate several paper based Workflows

- Corrective Actions and Preventive Actions
- Maintenance Prevention
- Well Done and Star Officer Employees Nomination and Approval
- Reward and Recognition Program
- Suggestion Portal based in Kaizen

The Requirements were generic industry standards and Customer did not have a issue for HRMates to use the same for other Clients.

Solution

All above workflows used Employee Relationships like Self, Reporting Manager, Head of Department, CEO etc. HRMates has following to allow quite and robust Automation

- XML based Form Creation
- Generic For Approval Workflow Code
- HRMates has inbuilt Organization Structure along with helper functions to get the relationships.
- Email System linked to Approval Process, along with use of Email Templates.

All of above were implemented in HRMates in 4 weeks and made Live. The Implementation allowed changed in Approval Process and Constraints from Database, so the same implementation can be used for other customers.

Here we will cover only Star Officer Recognition in detail to demonstrate HRMates Workflow Process

Application Form

Star Officer Employee ✕

Date *

Employee Name *

Result and Impact *

Involvement in Improvement Orientation *

Contribution Towards Safety Excellence Journey *

Discipline *

APPROVALS

| Role | By | Comments * | On | Submit | Reject | Status |
|-------|--|------------|----|---------------------------------------|--------|--------|
| HOD | KARUNA KUMARI SA0065 ASSISTANT GENERAL MANAGER | | | <input type="button" value="Submit"/> | | |
| Panel | RAHUL KUMAR SA0056 GENERAL MANAGER | | | | | |
| Panel | ANITA SINGH SA0033 VICE PRESIDENT | | | | | |
| Panel | AMRITA SHARMA SA0098 DEPUTY GENERAL MANAGER | | | | | |
| Panel | SUSHIL MISHRA SA0012 VICE PRESIDENT | | | | | |
| Panel | ATUL SAXENA SA0087 SENIOR MANAGER | | | | | |
| HR | KARUNA KUMARI SA0065 ASSISTANT GENERAL MANAGER | | | | | |

Workflow and Constraints

Nomination

Only CEO and Head of Department can Nominate an Employee

Nominated Employee should be of Officer Grade

CEO can nominate any Officer

Head of Department can Nominate any Officer within their Department only

Panel Approval

There is a fixed Panel of Employees, but the members can change over time

Panel Members should get Star Officer Notification in parallel

Panel Members can Reject a Nomination after providing a Reason

Panel Members cannot Modify the Form

Final Approval

Finally Approval / Rejection will be done by HR based on Panel Recommendations

Alerts

Each Member in Approval List will get a Email Notification when his action is due. Also they will get a notification on their Dashboard.

Monitoring

HR will be able to monitor the process from Star Officer Dashboard

Reward and Recognition

Certain Number of Points will be added to Star Officer Rewards Account based on Setup
Approved Star Officer name will appear on HRMates Announcement Board for 7 days

Change Process

System should be built to accommodate change of Employees in Approval Process, Change of Approval Process itself, Change in Form

Implementation

Implementation was done using generic HRMates Workflow Process.

Form Creation

Monitor and Appointment forms were created using AppPress (Form Structure was defined with XML), Database Tables. This took 1 working day.

Workflow Creation

Generic Workflow Logic was copied in Source Code and Modified to suit the requirement. This took 2 working days. The Generic Workflow has most of requirements of above Process available. Generic Workflow also includes a Database Calculator “StarOfficersApprovers”. This function is different for each HRMates Customer and can be configured for different requirements.

Specifically following was achieved with code change

- Add a Comments Column in Approval Process, Editable by Approve, Visible to All and Hidden for Summitter.
- Another Database Function was added “StarOfficerFilter” which returned a query to filter employees that can be Nominated by the Submitter. The function in turn uses inbuilt HRMates functions to use Organization Structure Functions
- Form Code was changes to use StarOfficer Filter.

Integration with R&R

R&R Database Calculator was updated to include Star Officer Points. Only Approved Nominations were included.