HRM SYSTEM

Complete User Guide

Admin & Employee Portal Reference

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Introduction

This guide explains, step by step, how to use the HRM System from both the Admin side and the Employee side. It expands on each screen of the system so that a new administrator or a new employee can follow along and understand not only what to click, but why each step matters and how it connects to the steps before and after it.

The system is organized around a simple hierarchy: a Company contains Departments, Departments contain Job Titles, and Job Titles are assigned to Employees. Once employees exist in the system, the Admin can manage their attendance, rotas (schedules), leave requests, documents, communications, and payroll from one place.

Each topic below includes a screenshot of the actual screen being described, so you can follow along visually as well as textually.

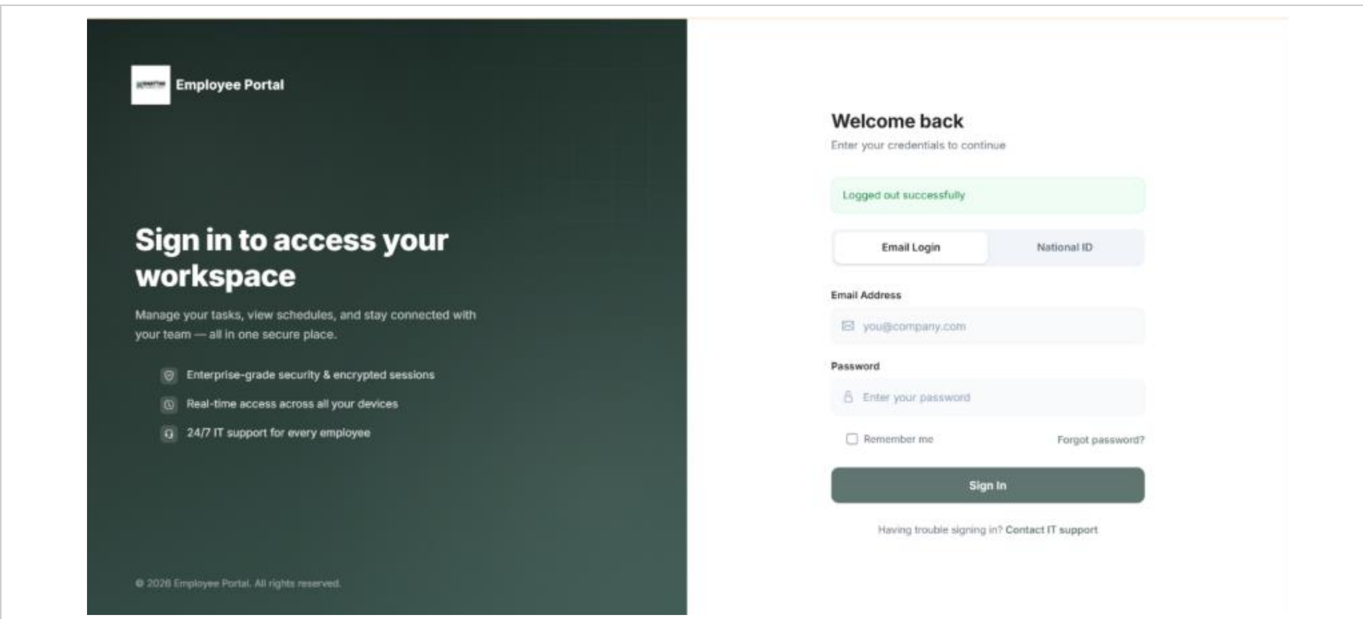
Part 1: Admin Side

1. Login into the System (Admin Side)

The admin side is accessed through the Employee Portal login screen. This is the entry point for anyone managing the company's HR data, and it supports two ways of signing in:

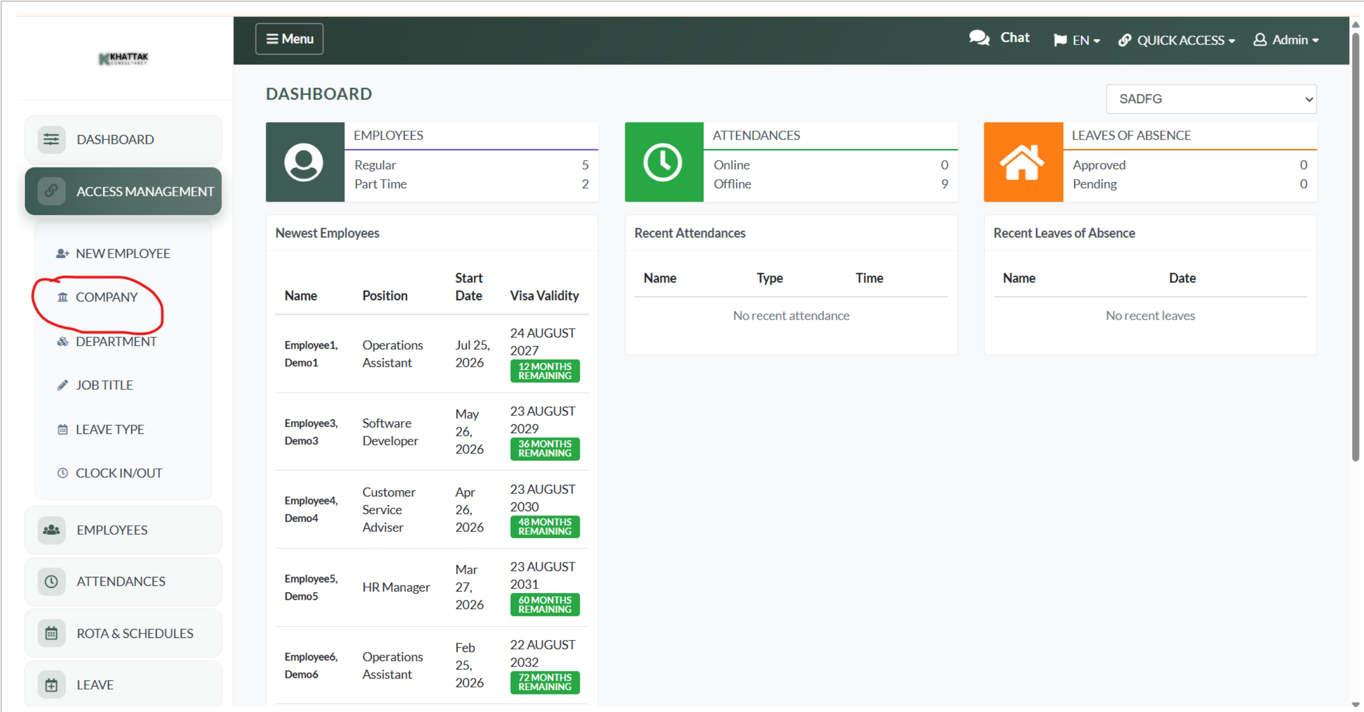
- Email Login — enter the registered email address and password that was set up for the admin account.
- National ID — an alternative login method, useful in cases where the admin prefers to sign in using a national identification number instead of an email address.

The login screen also offers a "Remember me" checkbox to stay signed in on a trusted device, and a "Forgot password?" link to recover access if the password is lost. A confirmation message (e.g. "Logged out successfully") appears when returning to this page after signing out, confirming the previous session was closed securely.



The Employee Portal login screen, with Email Login and National ID options.

Once logged in, the admin lands on the main Dashboard, which gives an at-a-glance summary of employees, attendance (online/offline), and pending leave requests, along with lists of the newest employees and the most recent attendance and leave activity.



The main Admin Dashboard, showing Employees, Attendances, and Leaves of Absence widgets.

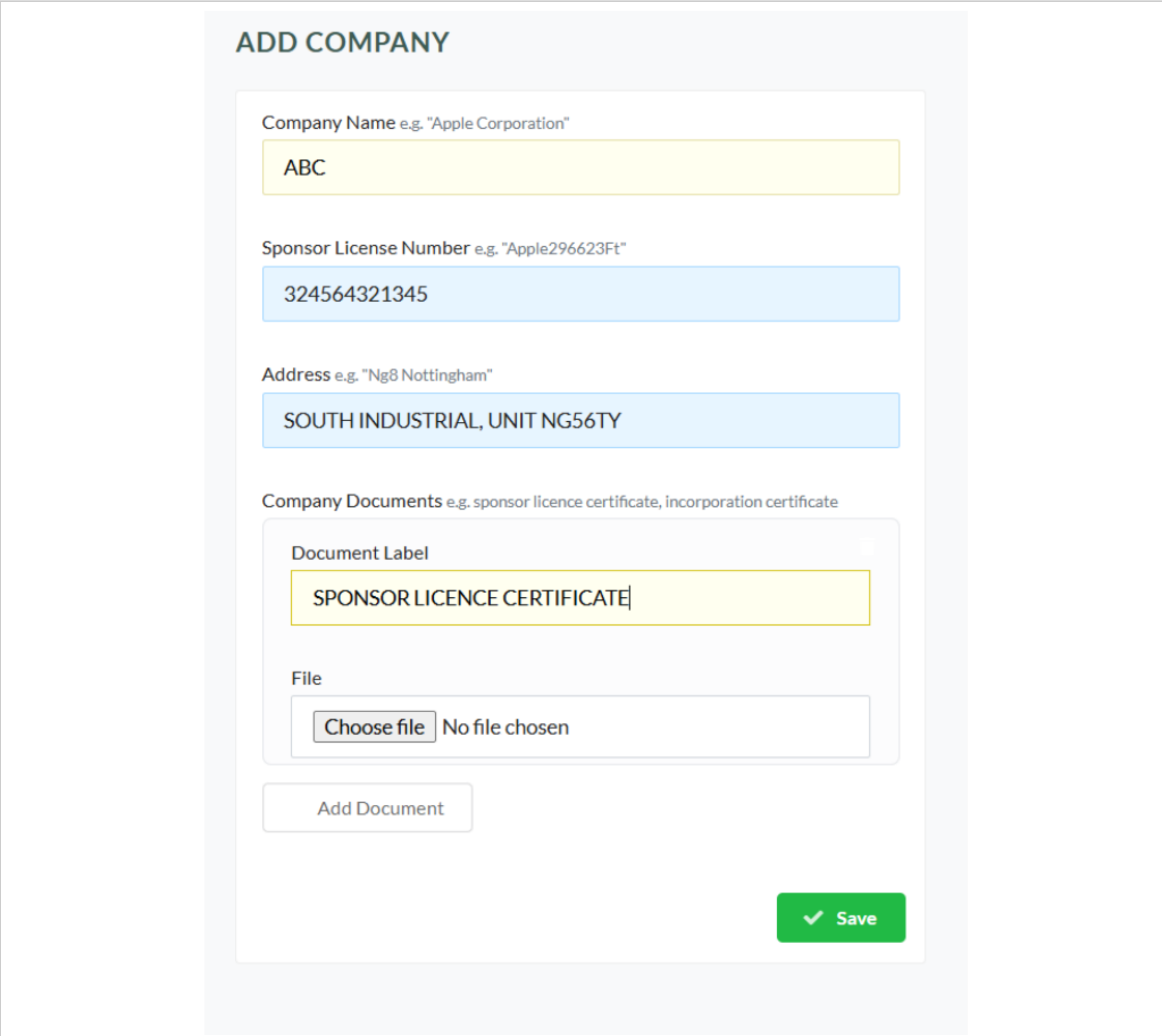
> ***Tip:*** *Use a strong password and enable "Remember me" only on a private, trusted computer, since this account can access sensitive employee data.*

2. Create Company

Before any department, job, or employee can be added, at least one Company record must exist. This is done from the sidebar menu under Access Management > Company.

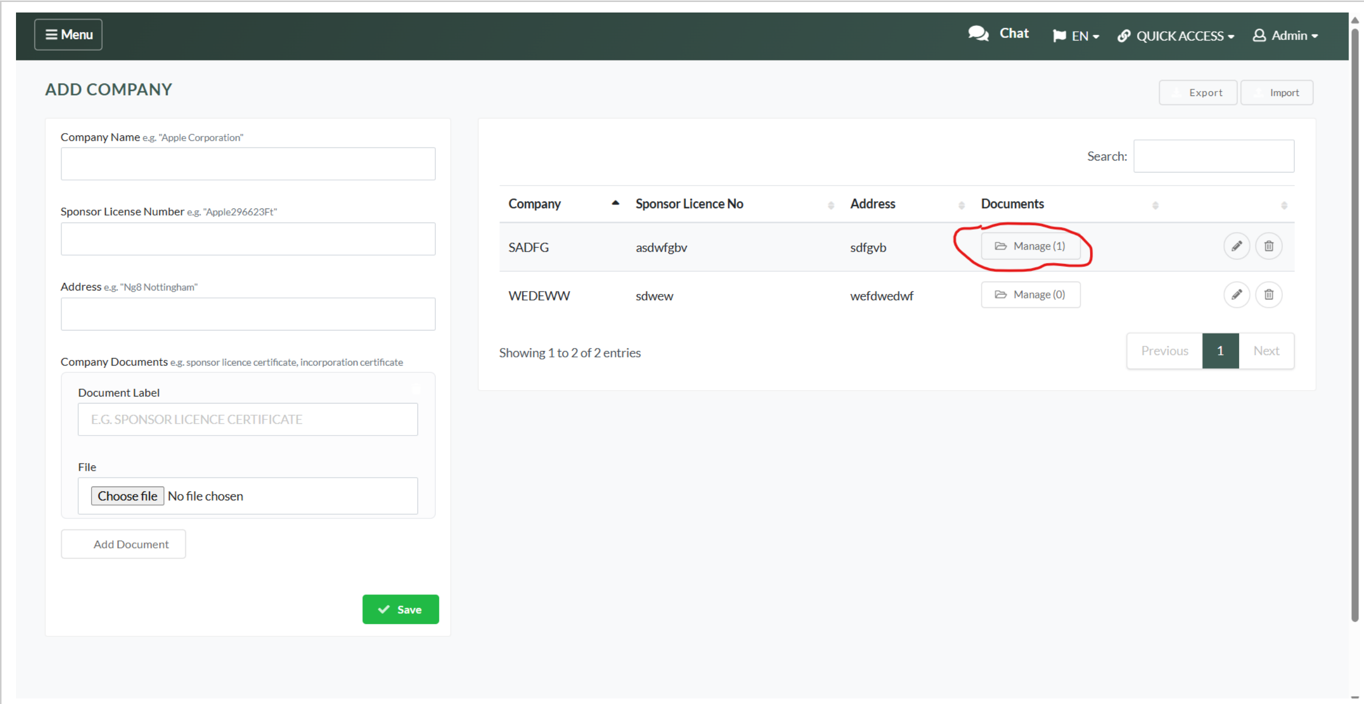
The Add Company form captures the core identity of the business:

- Company Name — the legal or trading name of the business (e.g. "Apple Corporation").
- Sponsor License Number — the licence number the company holds, relevant for organisations that sponsor visas for their staff.
- Address — the registered or operating address of the company.
- Company Documents — supporting files can be attached and labelled (for example, "Sponsor Licence Certificate" or an incorporation certificate). Each document is given a Label and a File, and the Add Document button adds it to the record before saving.



The Add Company form, including the Company Documents upload section.

After saving, the company appears in a searchable table showing its name, sponsor licence number, address, and a Documents column with a "Manage" link showing how many documents are attached. From this table, an admin can edit or delete a company, and export or import company records in bulk.



The company list with the Documents "Manage" link highlighted.

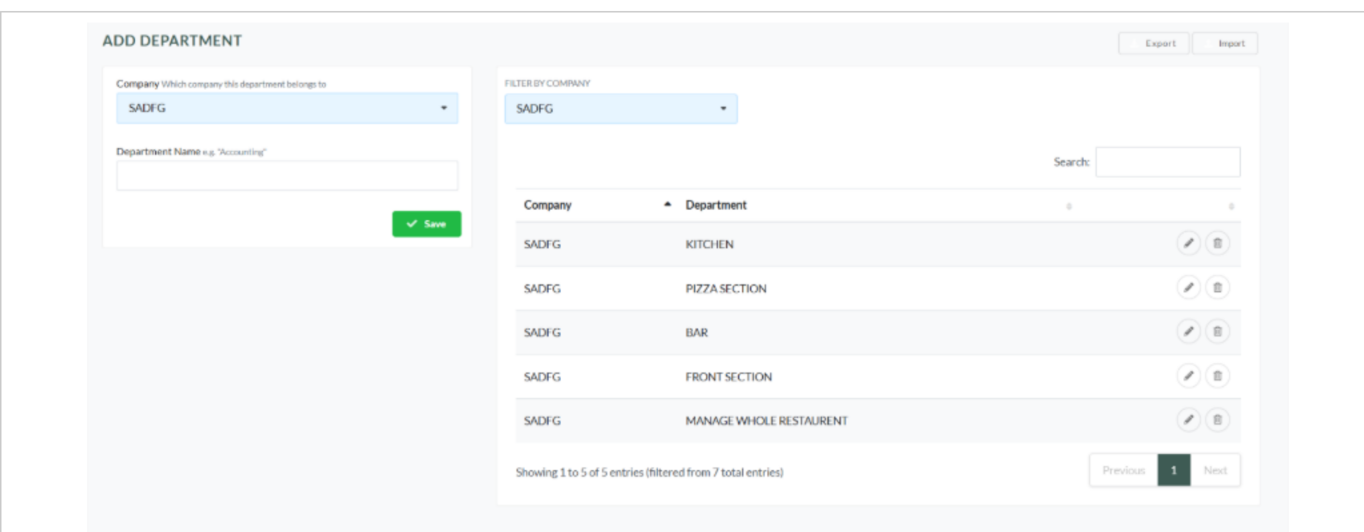
> ***Tip:*** *Set up the company profile first — departments, jobs, and employees are all created underneath a company, so this is the foundation of the whole system.*

3. Create Department

Departments organize the company into functional groups (for example, Kitchen, Bar, or Front Section in a restaurant). To add a department:

- Select the Company the department belongs to from the dropdown.
- Enter the Department Name (e.g. "Accounting").
- Click Save.

A filter at the top of the department list lets the admin filter by company to see only the departments that belong to it. The department table lists each department alongside its company, with edit and delete actions available for every row.



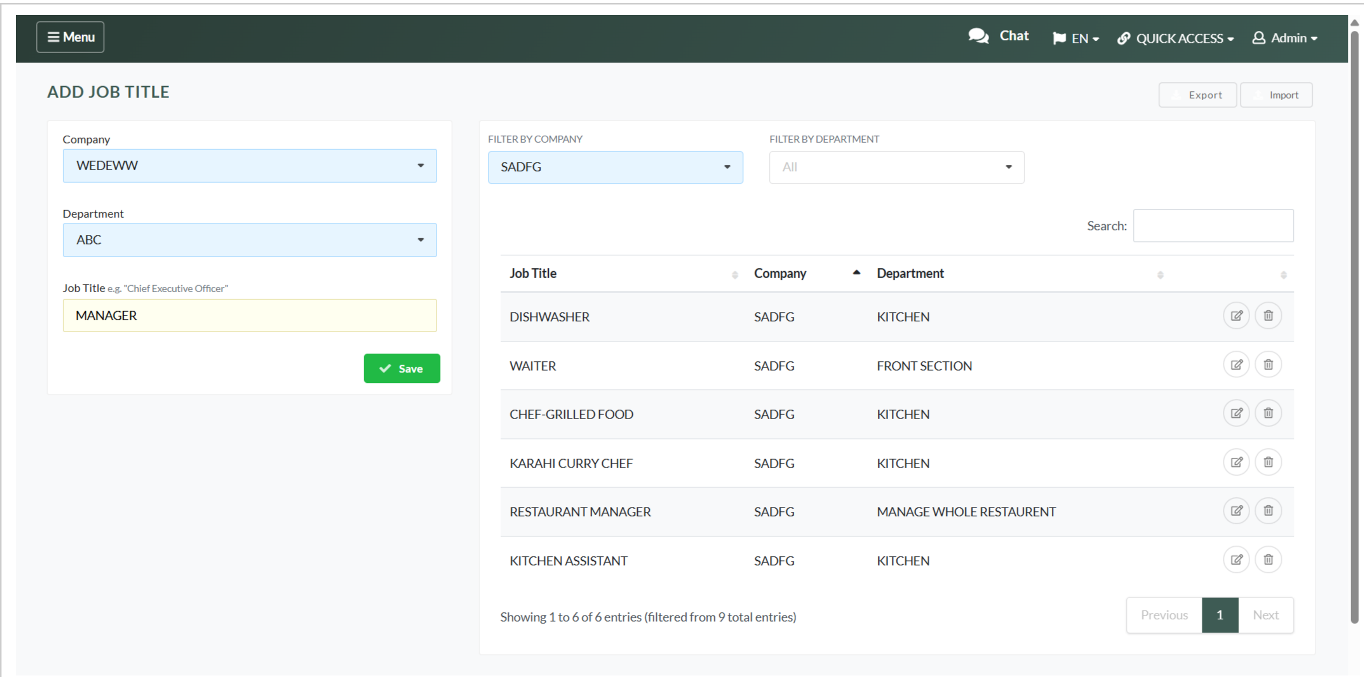
The Add Department form and the resulting department list, filtered by company.

> ***Tip:*** *It's recommended to create all the departments for a company first, before moving on to job titles — this keeps the department dropdown complete when jobs are created next.*

4. Create Job in a Department of a Company

Job titles sit underneath departments. To create one, the admin selects the Company, then the Department that job belongs to, and finally types in the Job Title (for example, "Chef-Grilled Food" under the Kitchen department).

The job list can be filtered by company and by department, and shows every job title alongside its parent company and department, with inline edit and delete controls. Because job titles are directly tied to a department, this structure keeps the organisation chart clean — an employee's job title always maps back to a specific department within a specific company.



The Add Job Title form and the job title list, filtered by company and department.

> ***Tip:*** *As with departments, it helps to create every job title needed for a department before assigning employees, so the Job Title dropdown is complete when adding staff.*

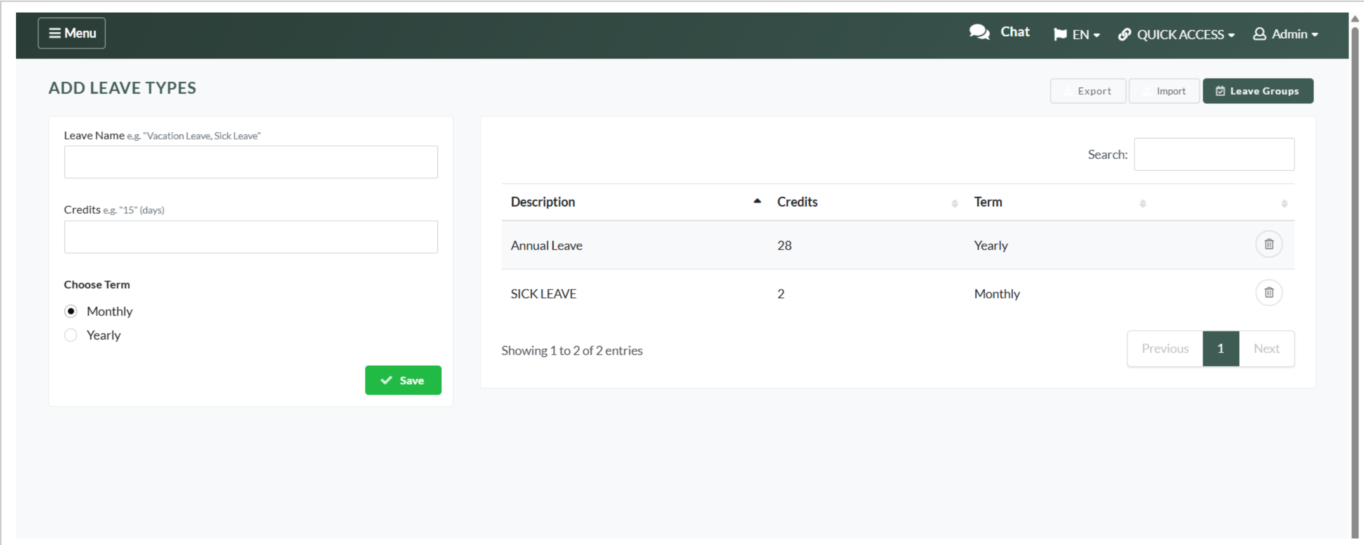
5. Create Leaves

This section defines the types of leave employees are entitled to and how leave is grouped together for assignment.

Leave Types

- Leave Name — the type of leave, e.g. "Vacation Leave" or "Sick Leave".
- Credits — the number of days allotted to this leave type (e.g. 28 days of Annual Leave).
- Choose Term — whether the credit renews Monthly or Yearly.

Once saved, each leave type appears in a table with its description, credit amount, and term, and can be removed if no longer needed.

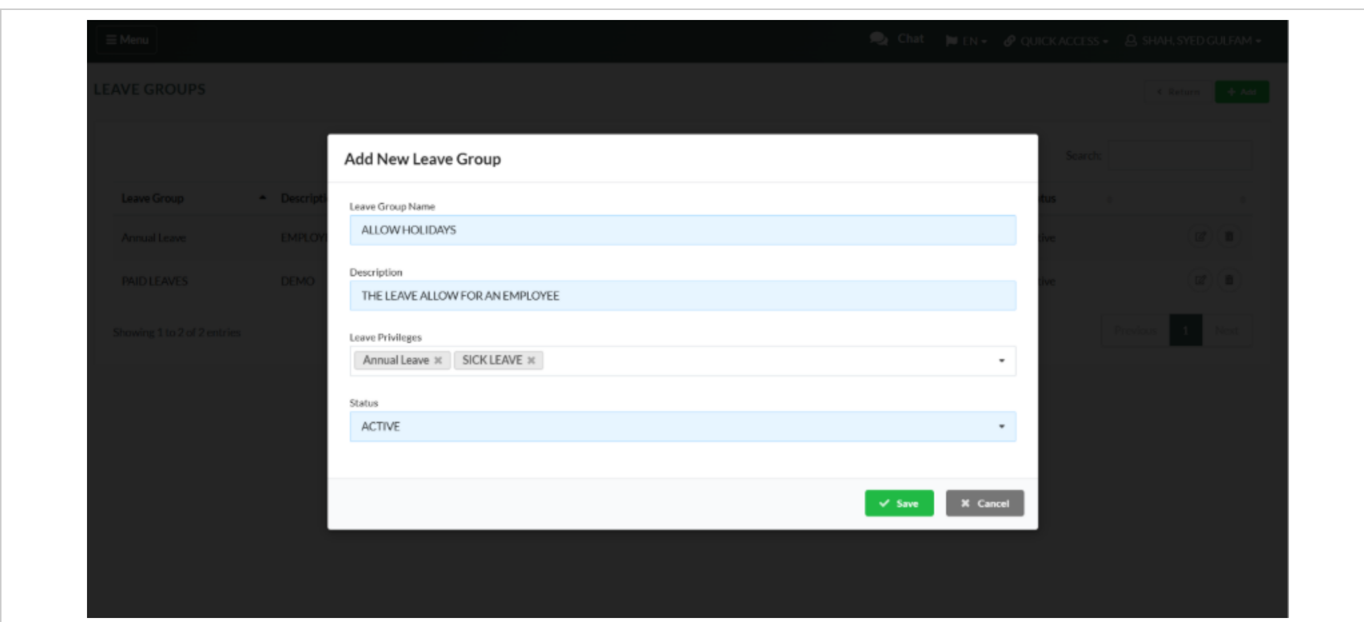


The Add Leave Types form, with Annual Leave shown as an example.

Leave Groups

After leave types exist, they are bundled into Leave Groups so they can be assigned to employees as a set. Clicking Add opens the Add New Leave Group dialog, where the admin enters:

- Leave Group Name — e.g. "Allow Holidays".
- Description — a short explanation of what the group covers, e.g. "the leave allowed for an employee".
- Leave Privileges — one or more leave types (such as Annual Leave and Sick Leave) that this group grants.
- Status — Active or Inactive, controlling whether the group is currently usable.



The Add New Leave Group dialog, combining Annual Leave and Sick Leave into one group.

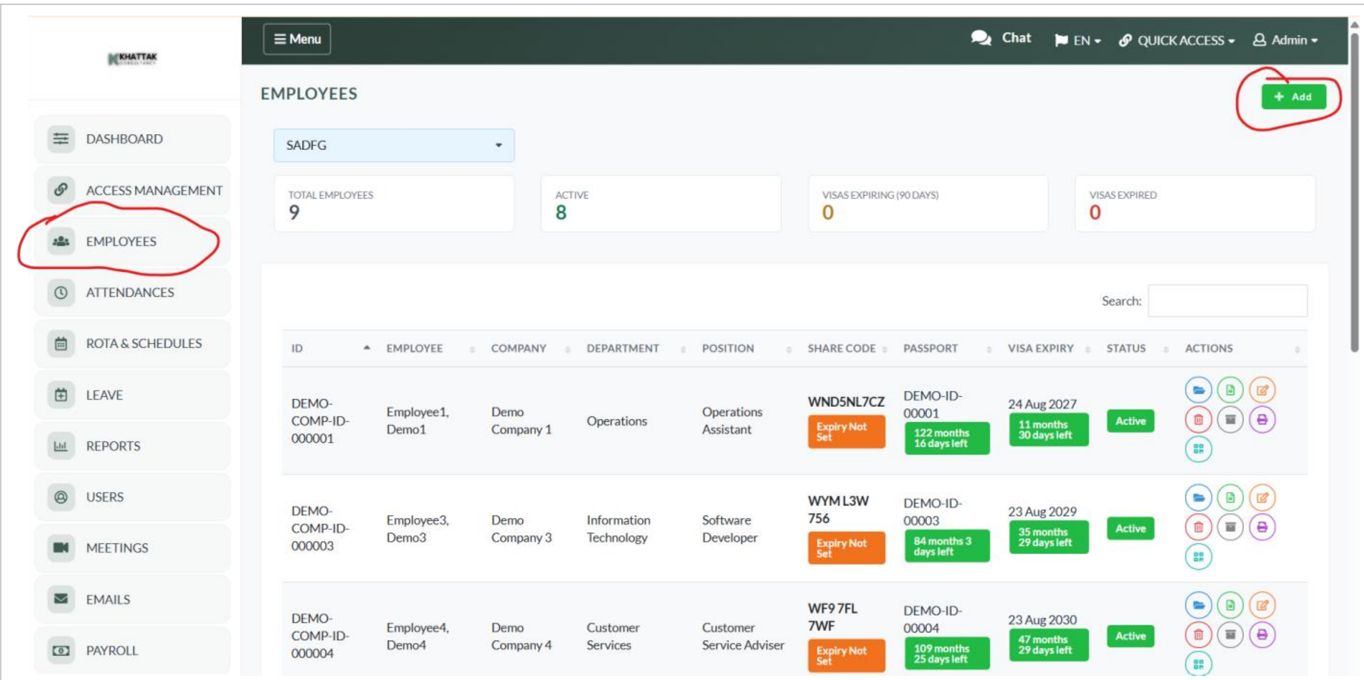
> ***Tip:*** *Build the individual leave types first, then combine them into a leave group — the group is what actually gets attached to an employee's profile.*

6. Employees Dashboard

The Employees section, accessed from the sidebar, is the central place to view and manage all staff for the selected company. The dashboard header shows four key figures at a glance:

- Total Employees — the full headcount for the company.
- Active — employees currently marked as active.
- Visas Expiring (90 Days) — a warning count of employees whose visa is due to expire soon.
- Visas Expired — employees whose visa has already lapsed.

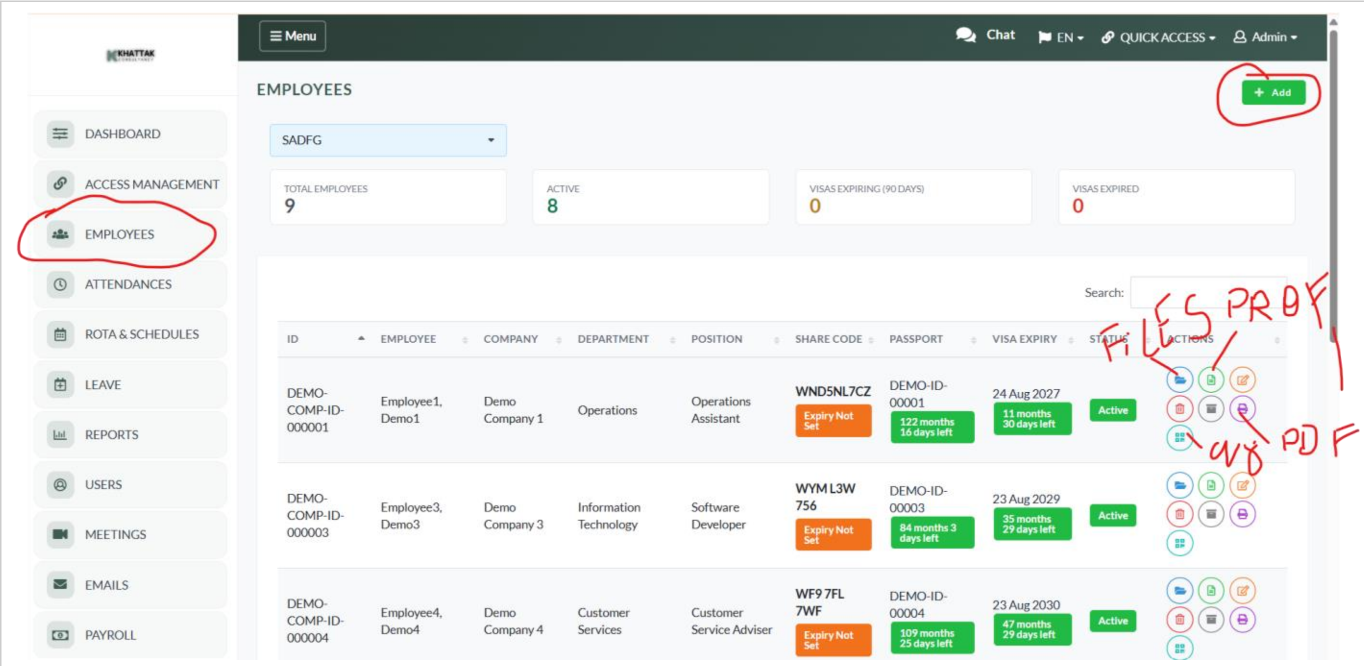
The employee table lists ID, Employee name, Company, Department, Position, Share Code, Passport number, Visa Expiry (with a colour-coded countdown), and Status (Active/Archived).



The Employees dashboard, showing headcount summary and the employee table.

Clicking the green + Add button opens the form to register a new employee. Each row also has a set of action icons:

- Profile — view the employee's full profile.
- Fill — complete or update missing employee details.
- Edit — modify the employee's existing information.
- Archive — remove the employee from the active list without permanently deleting their history.
- PDF — export the employee's record as a PDF document.



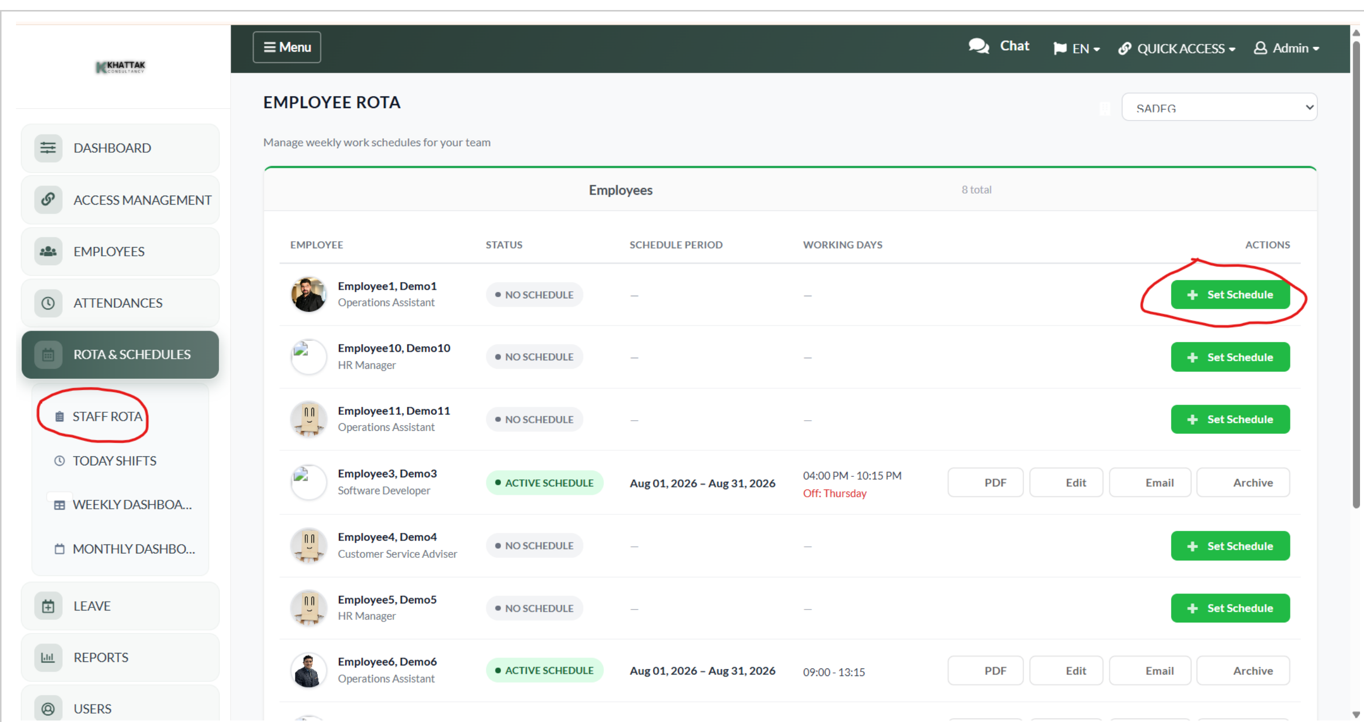
The Employees table with each row action icon labelled: Fill, Profile, Edit, Archive, and PDF.

> ***Tip:*** *The colour-coded visa status badges (e.g. green for plenty of time left, amber approaching expiry, red expired) make it easy to spot compliance risks at a glance.*

7. Set Rota (Staff Scheduling)

Rota & Schedules, found under Staff Rota in the sidebar, is where working schedules are built for each employee over a date range.

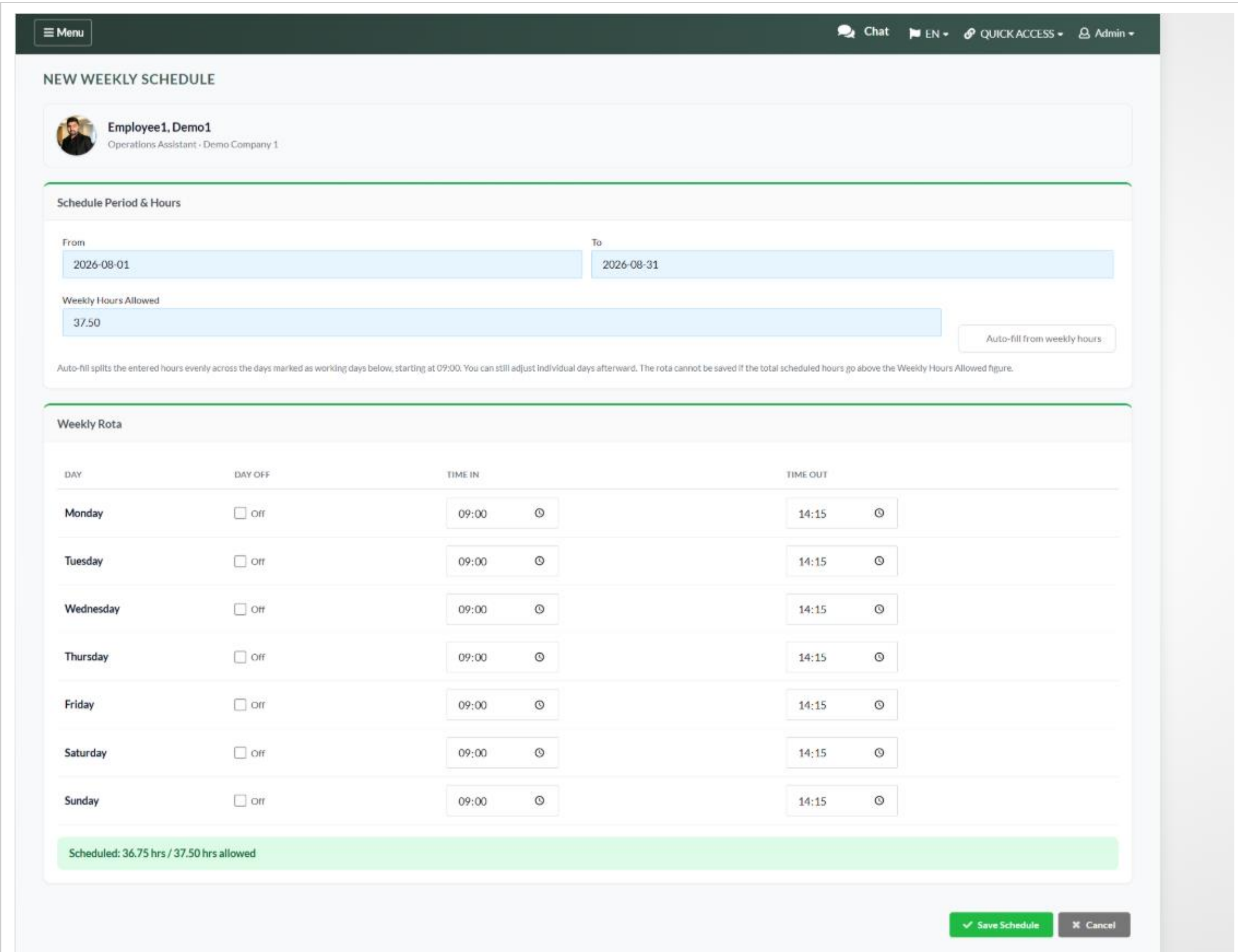
The Employee Rota screen lists every employee with their current schedule status (Active Schedule or No Schedule), the Schedule Period, and their Working Days. From here the admin can view the schedule as a PDF, Edit it, Email it to the employee, Archive it, or click + Set Schedule to create a new one.



The Employee Rota list, showing schedule status and the + Set Schedule button.

Creating a new weekly schedule involves:

- Schedule Period & Hours — a From date and To date defining how long the rota runs, plus a Weekly Hours Allowed figure that caps the total hours that can be scheduled.
- Auto-fill from weekly hours — a shortcut that evenly splits the allowed hours across the marked working days, starting from a default time, which can then be fine-tuned.
- Weekly Rota grid — for each day (Monday through Sunday), the admin can mark the day as Off or set a Time In and Time Out.



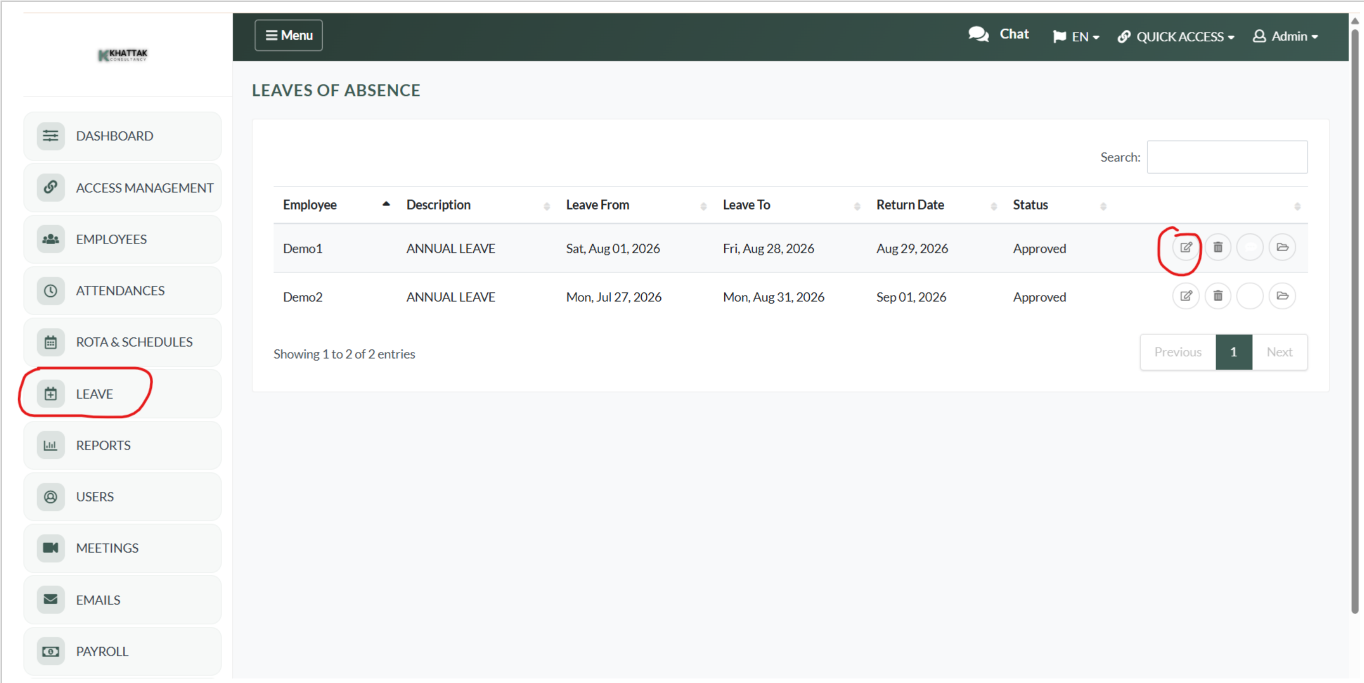
The New Weekly Schedule form, showing the working-hours grid for each day.

The screen keeps a running total, such as "Scheduled: 29.75 hrs / 30.00 hrs allowed," and will not let the schedule be saved if the total scheduled hours exceed the Weekly Hours Allowed figure. Once saved, the rota can be emailed directly to the employee so they have a copy of their working hours.

> ***Tip:*** *Watch the running hours total at the bottom of the grid — the system blocks saving a rota that goes over the weekly hours allowed.*

8. Manage Leaves (Leaves of Absence)

This screen is where leave requests submitted by employees are reviewed and actioned. It lists each request with the Employee name, a Description of the leave type, the Leave From and Leave To dates, the Return Date, and the current Status (e.g. Approved, Pending).



The Leaves of Absence screen, listing employee requests and their status.

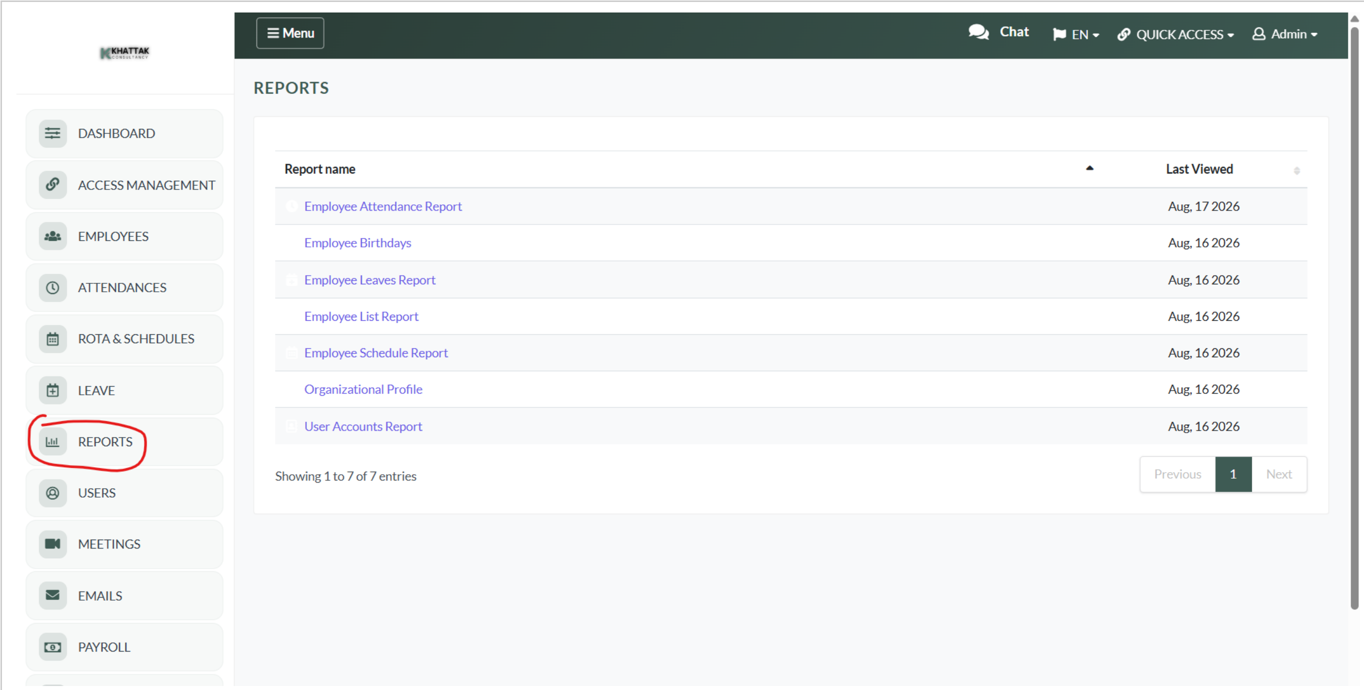
Using the action icons on each row, the admin can edit the request's details, delete it, or approve/decline it — effectively making the final decision on whether the time off is granted. This is the same data that feeds the "Leaves of Absence" counters shown on the main dashboard and on the employee's own dashboard.

> ***Tip:*** *Review pending leave promptly — employees can see the status of their request update in real time on their own portal once a decision is made.*

9. Reports

The Reports section provides a library of ready-made reports that can be generated and exported as PDF files. Available reports include:

- Employee Attendance Report — summarises clock in/out activity across employees.
- Employee Birthdays — lists upcoming staff birthdays.
- Employee Leaves Report — a record of leave taken or requested.
- Employee List Report — a full directory of staff.
- Employee Schedule Report — a summary of assigned rotas.
- Organizational Profile — an overview of the company structure.
- User Accounts Report — a list of system user accounts and their roles.



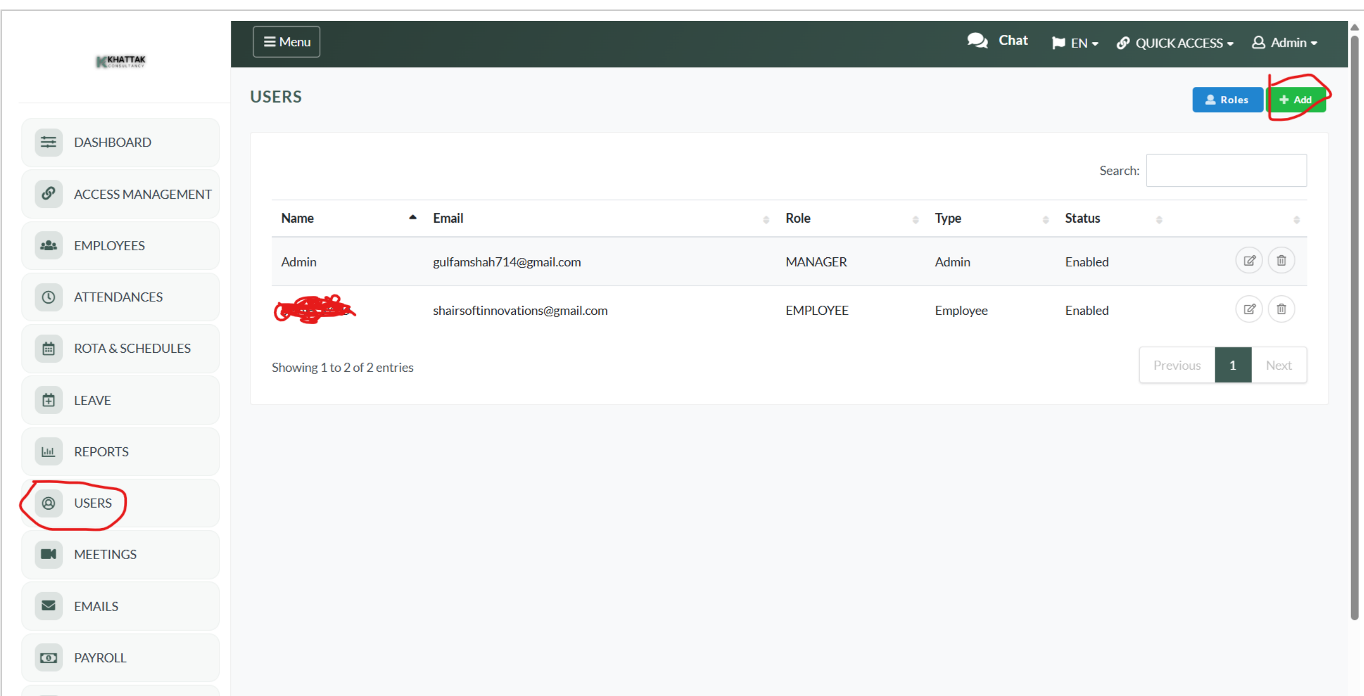
The Reports screen, listing every available report and when it was last viewed.

Each report shows a "Last Viewed" date, so the admin can quickly see how current the data is before generating a fresh copy.

> ***Tip:*** *Use these reports for compliance checks (visas, attendance) and for quick exports to share with management or auditors.*

10. Users

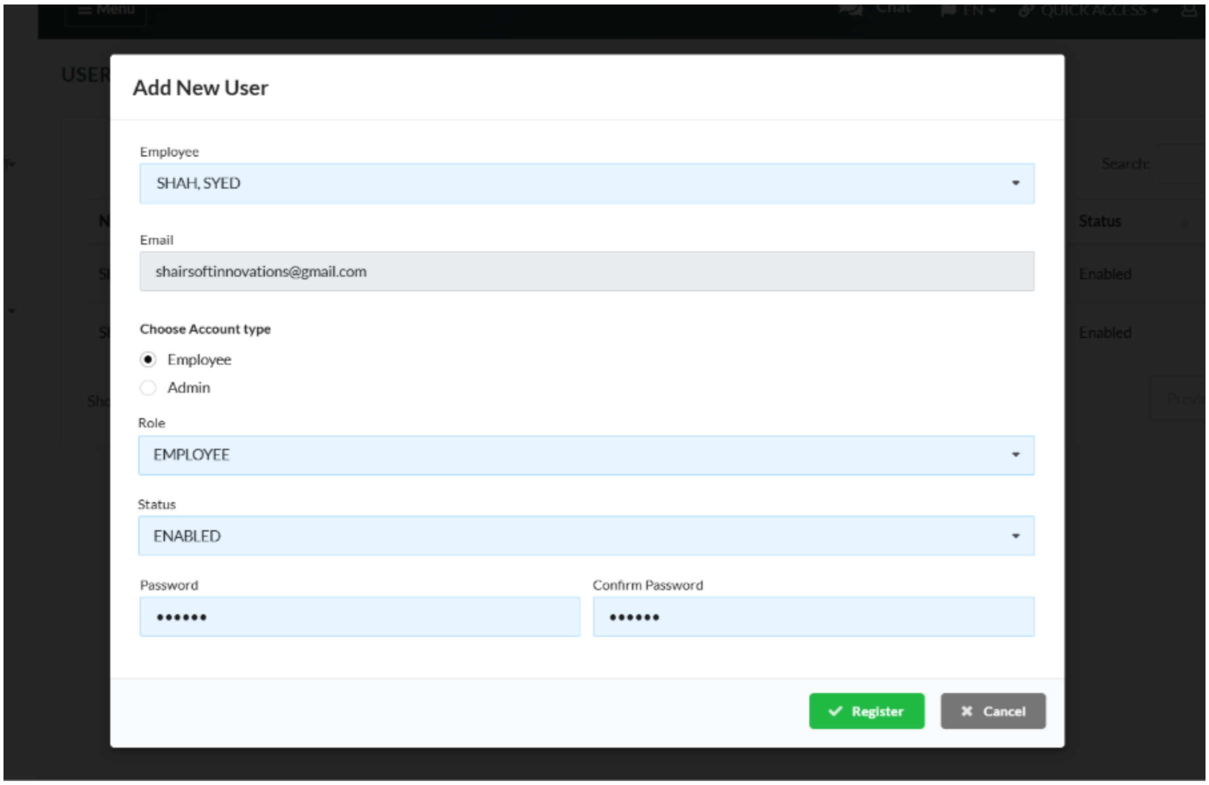
The Users section controls who can log in to the system and what role they hold. The user list shows Name, Email, Role, Type (Employee or Admin), and Status (Enabled/Disabled), with edit and delete actions on each row. A Roles button manages the permission roles available in the system.



The Users list, showing each account's role, type, and status.

Clicking + Add opens the Add New User dialog, where the admin sets:

- Employee — the existing employee record this login is tied to.
- Email — pre-filled from the employee's record and used as the login identifier.
- Choose Account Type — Employee (portal access to their own data) or Admin (management access).
- Role — the specific permission role assigned, such as EMPLOYEE or MANAGER.
- Status — Enabled or Disabled, to activate or suspend the login.
- Password / Confirm Password — the credentials set for this account.



The Add New User dialog, linking a login to an existing employee record.

This is how an existing employee record is turned into a usable login — an employee must already exist before a user account can be created for them.

> ***Tip:*** *Give Admin accounts only to staff who genuinely need to manage company-wide data; use Employee-type accounts for everyone else.*

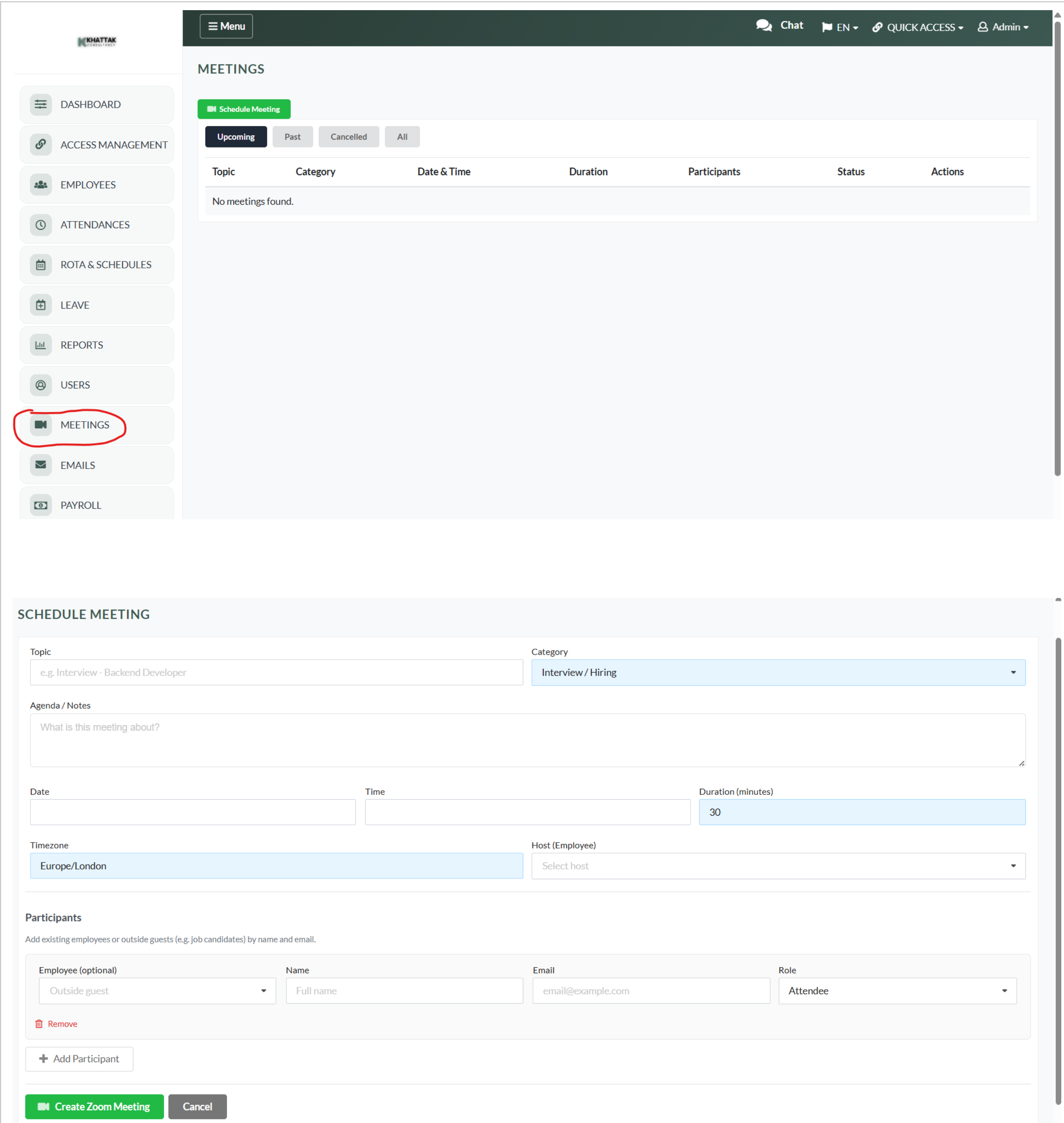
11. Create Zoom Meeting

The Meetings section lets the admin schedule and track video meetings directly from the system — useful both for interviewing job candidates and for internal meetings with existing employees. Meetings are organised into Upcoming, Past, Cancelled, and All tabs, each listing the Topic, Category, Date & Time, Duration, Participants, Status, and available Actions.

Clicking Schedule Meeting opens a form to configure the session:

- Topic — a short title, e.g. "Interview – Backend Developer".
- Category — the purpose of the meeting, such as Interview/Hiring.
- Agenda/Notes — free text describing what the meeting will cover.
- Date, Time, and Duration (minutes) — when the meeting takes place and how long it is scheduled to run.
- Timezone — the timezone the meeting time is based in (e.g. Europe/London).
- Host (Employee) — which staff member is hosting the call.

- Participants — added individually with a Name and Email (and optionally linked to an existing Employee, or added as an outside guest such as a job candidate) along with their Role (e.g. Attendee). Additional participants can be added with + Add Participant.



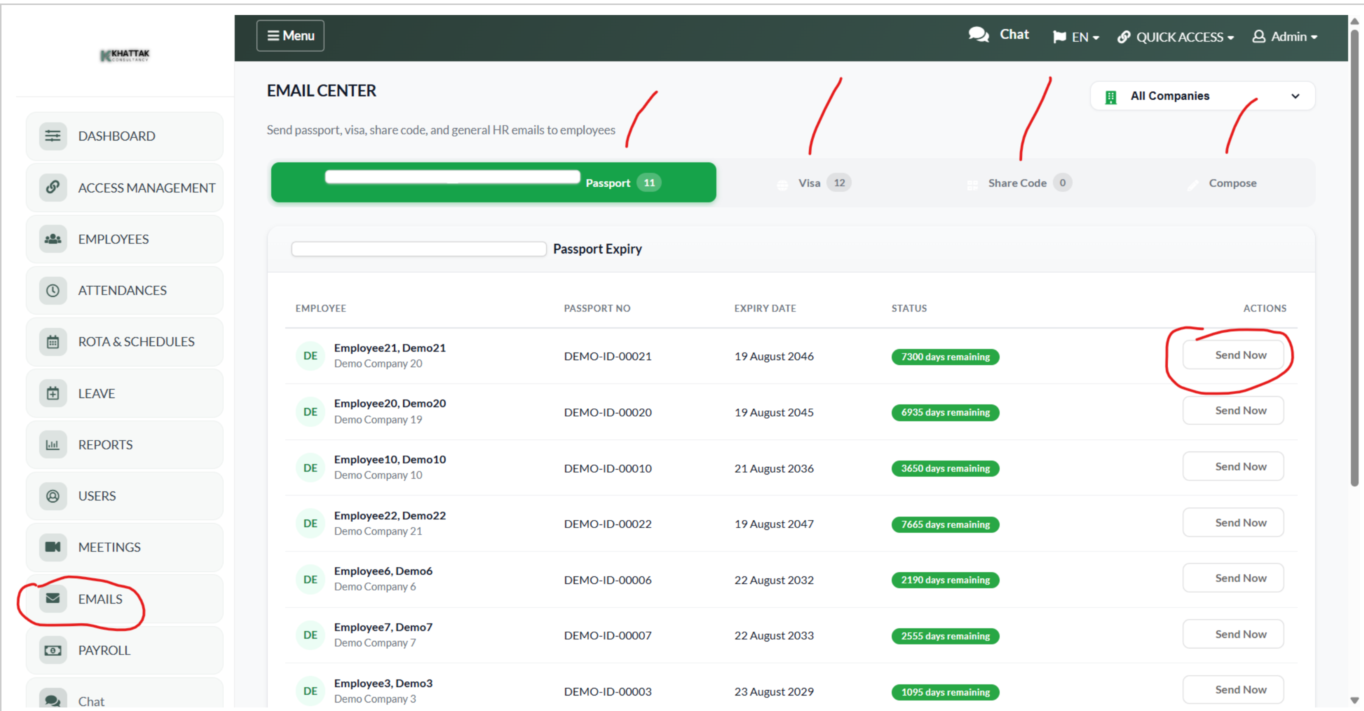
The Meetings list and the Schedule Meeting form for creating a new Zoom meeting.

Clicking Create Zoom Meeting generates the meeting and keeps a saved record of it in the Meetings list, which is useful for recruiting audit trails and for keeping a history of internal check-ins.

12. Emails Centre

The Email Center is the hub for all HR-related email communication — passport reminders, visa reminders, and general messages. It shows tabs for:

- Passport Reminders — a list of employees whose passport or national ID is approaching or past its expiry date, with a colour-coded remaining-time indicator (e.g. green for plenty of time, amber for approaching, red for expired) and a Send Now button per employee.
- Visa Reminders — the same style of reminder list, but focused on visa expiry dates.
- Compose Email — a free-form option to write and send a custom message to selected people.



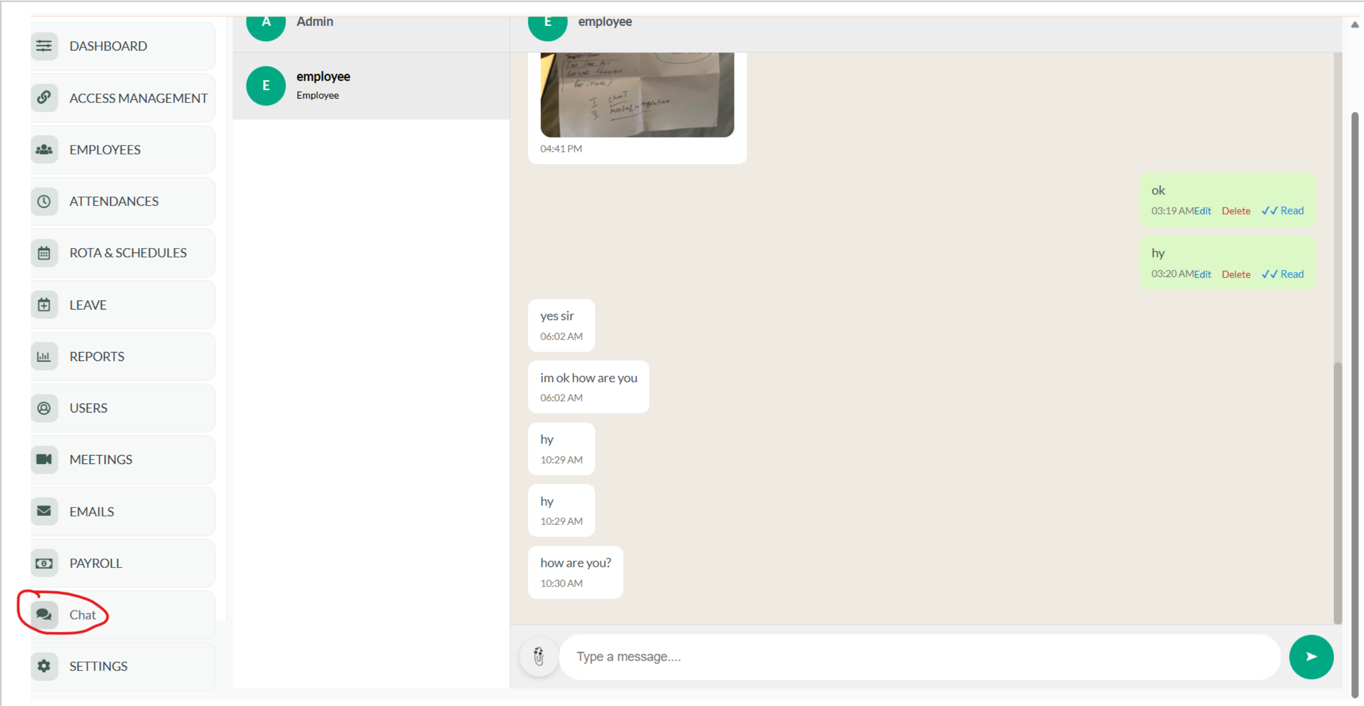
The Email Center, showing the Passport Reminders tab with expiry countdowns.

This means reminder emails can either be triggered manually by the admin (via Send Now) or generated automatically by the system as expiry dates approach, reducing the risk of a compliance document lapsing unnoticed.

> ***Tip:*** *Check the Passport and Visa Reminders tabs regularly — the colour coding is designed to flag urgent cases before documents actually expire.*

13. Chat

The Chat feature provides direct messaging between the admin and individual employees, right inside the HRM system. The left panel lists conversations by employee name and role, and the main panel shows the message thread, including text messages and shared images (for example, a photo of a handwritten note or document).



The Chat screen, showing a conversation thread with an employee, including a shared image.

Each message shows a timestamp and read receipts, and messages can be deleted from the admin's side. A simple text box at the bottom, with an attachment icon, lets the admin type a message or attach a file and send it.

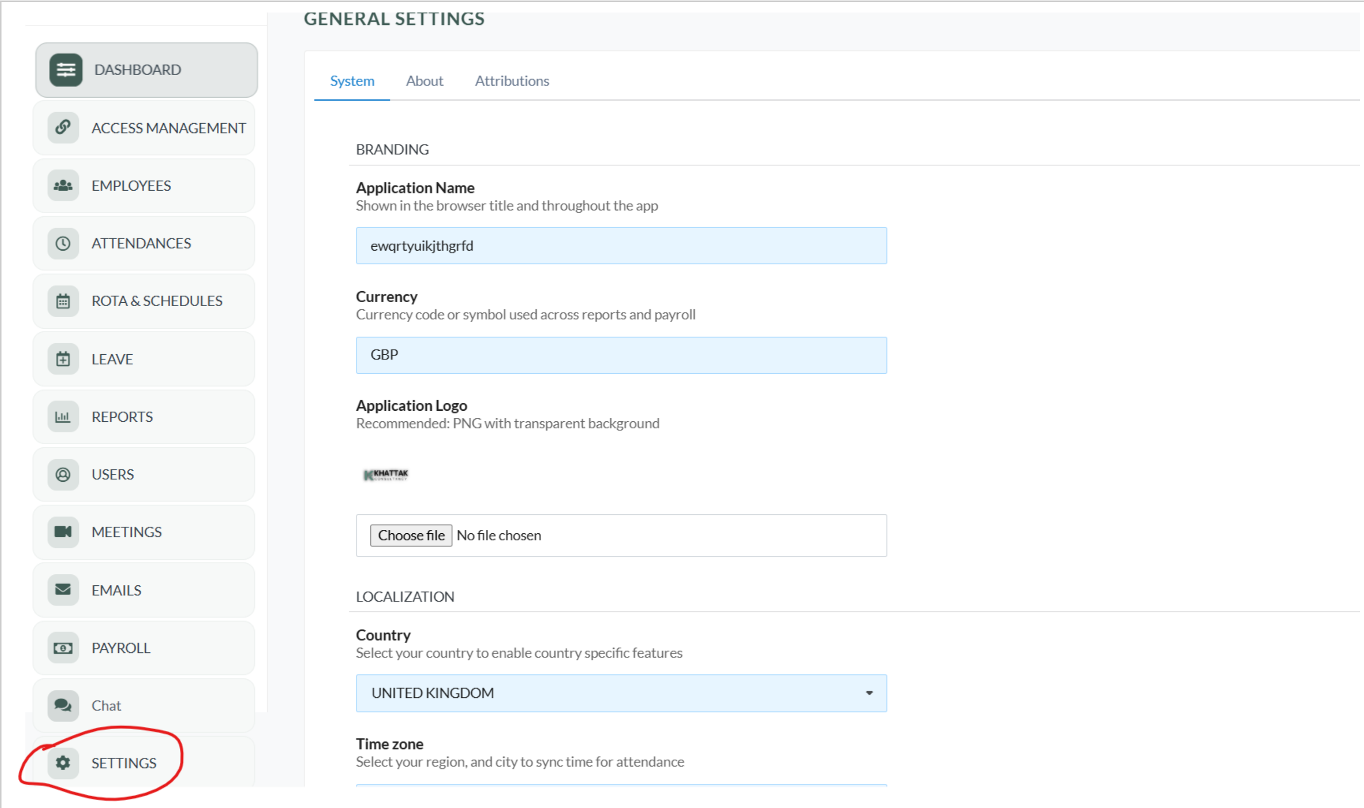
> ***Tip:*** *Chat is a convenient channel for quick clarifications, but formal notices (like leave decisions or visa warnings) are better tracked through the Leave and Email Centre features, which keep a structured record.*

14. Settings

The Settings area, under General Settings, lets the admin configure how the whole system looks and behaves. It is organised into tabs: System, About, and Attributions.

Within the System tab, key options include:

- Branding — Application Name (shown in the browser title and throughout the app) and Application Logo (recommended as a PNG with a transparent background).
- Currency — the currency code or symbol used across reports and payroll (e.g. GBP).
- Localization — the Country setting, which enables country-specific features relevant to that region.



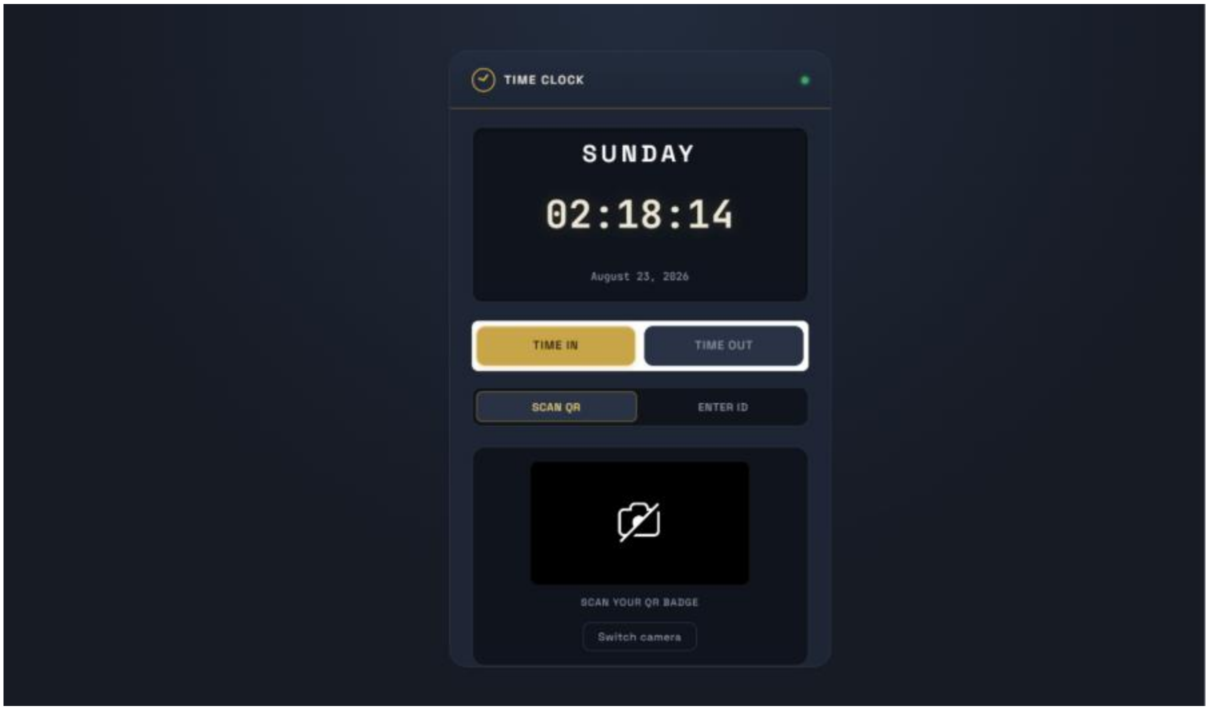
The General Settings screen, showing Branding and Currency options.

These settings affect the whole system for every user, so they are typically configured once during setup and revisited only when the company's branding or region changes.

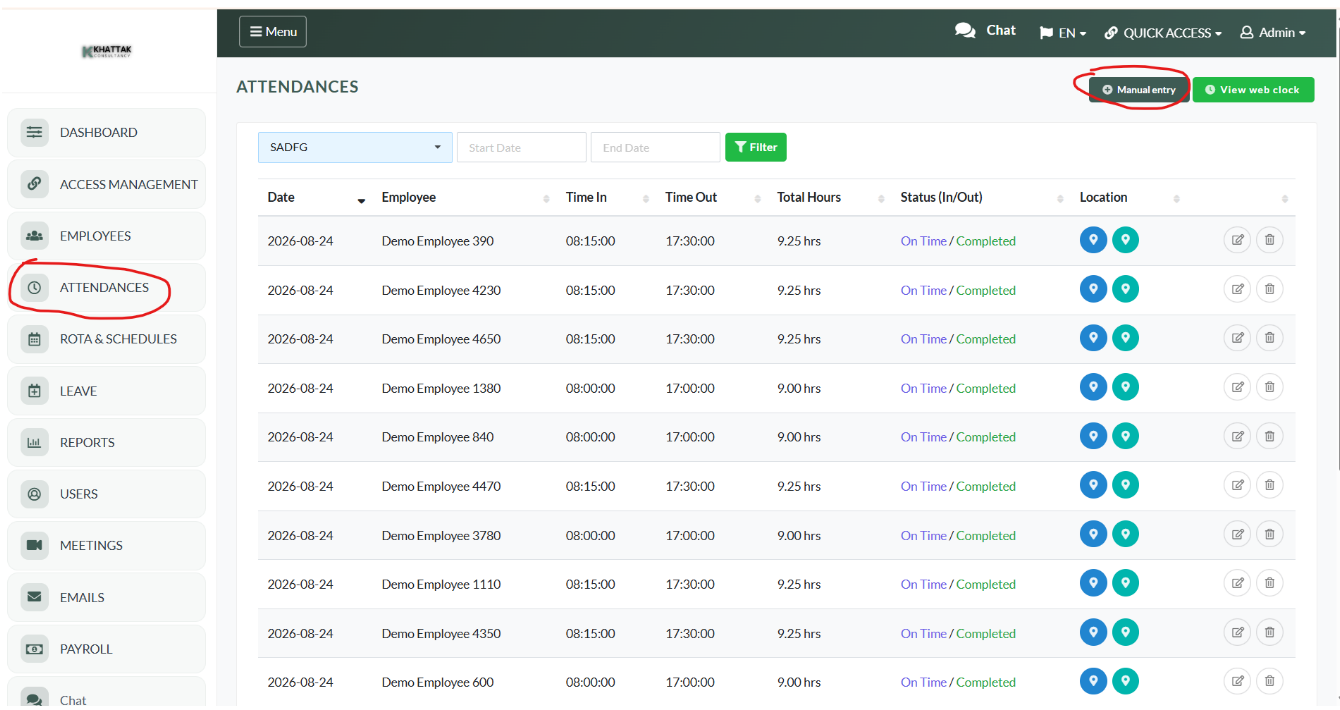
15. Clock In / Clock Out

This is the physical or kiosk-style attendance screen employees use to record their working hours. The Time Clock widget displays the current day and a live clock, and offers two choices before recording a punch:

- Time In / Time Out — a toggle to indicate whether this is the start or the end of a shift.
- Scan QR / Enter ID — the method of identifying the employee, either by scanning a personal QR badge with the camera or by manually entering an employee ID.



Also make manual attendance



The Time Clock kiosk widget, with Time In/Time Out and Scan QR/Enter ID options.

When Scan QR is selected, the screen activates the camera and prompts the employee to "scan your QR badge." A Switch camera option is available if the device has more than one camera. This same clock in/out mechanism appears again on the employee side under "Make Attendance," giving employees a personal version of the same tool.

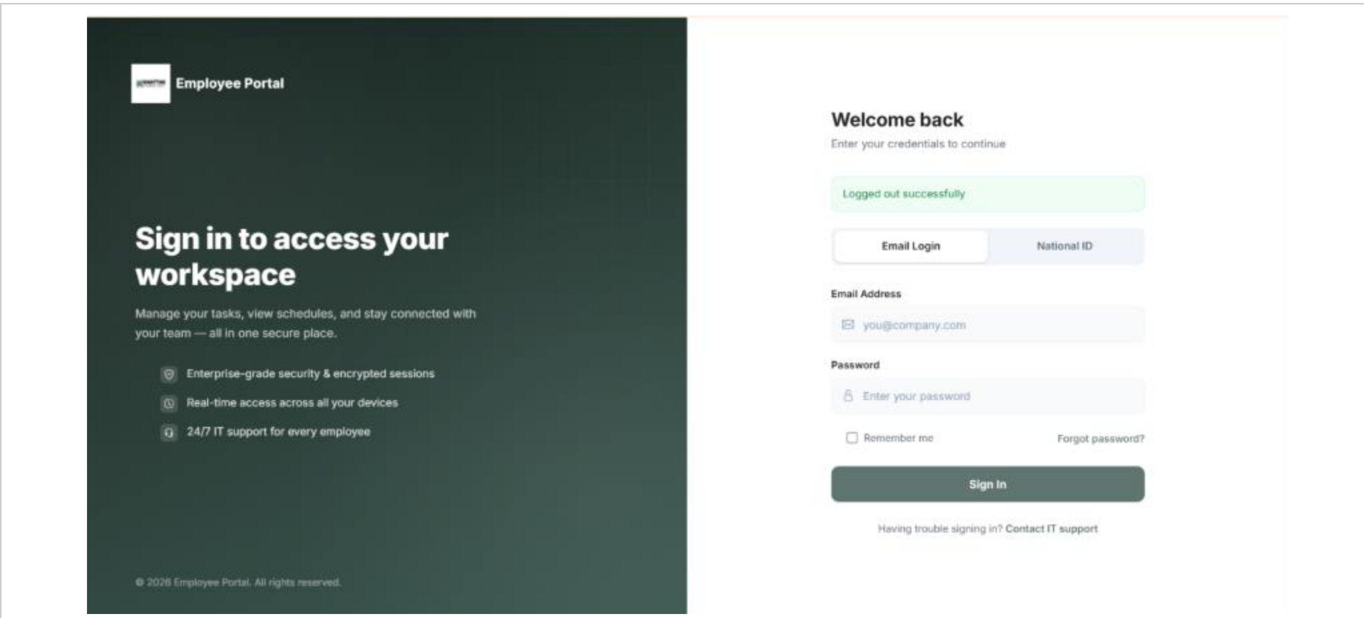
> ***Tip:*** *At clock-in, select Time In and confirm; at the end of the shift, switch the toggle to Time Out before recording — selecting the wrong option will log the punch under the wrong type.*

Part 2: Employee Side

1. Login as Employee

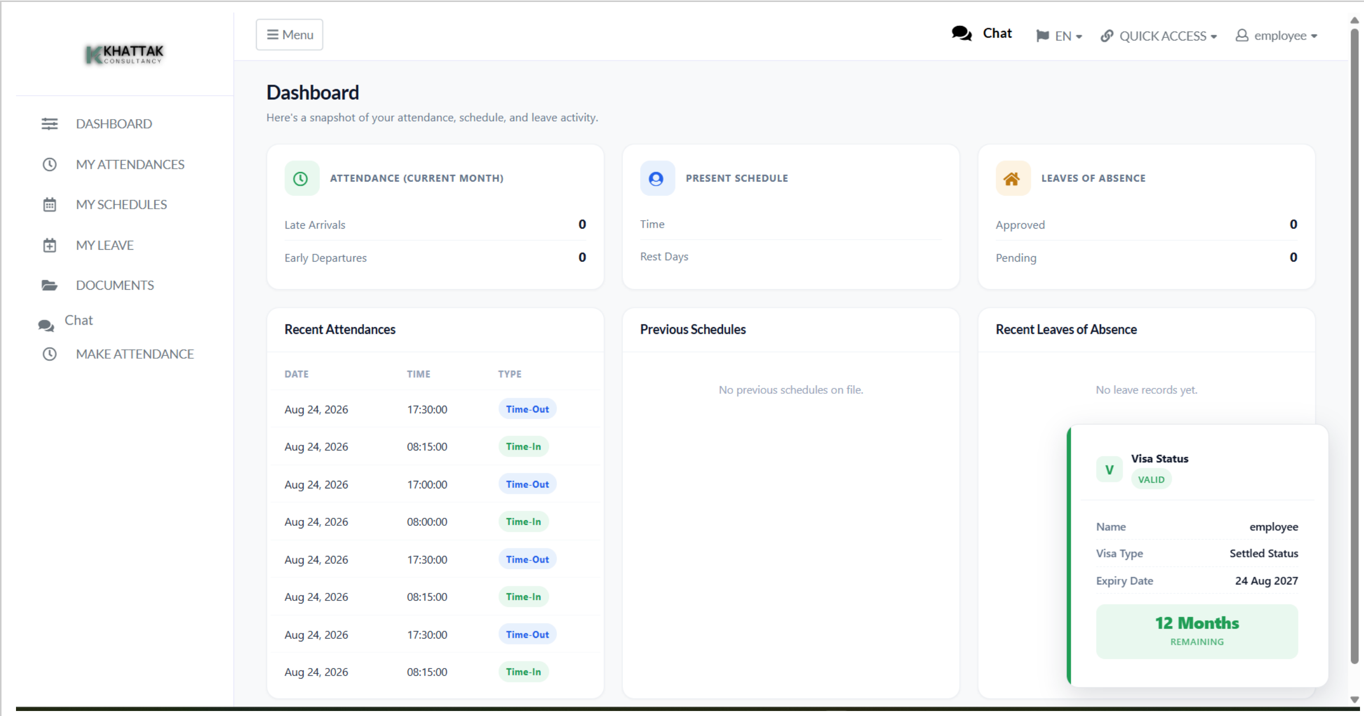
Employees use the same Employee Portal sign-in screen as admins, but with credentials scoped to their own account. Two login methods are supported:

- Email Login — using the email address and password issued by the admin when the user account was created.
- National ID — signing in using a passport number and date of birth instead of an email and password, which is useful for staff who have not been given a separate email login.



The employee sign-in screen, with Email Login and National ID options.

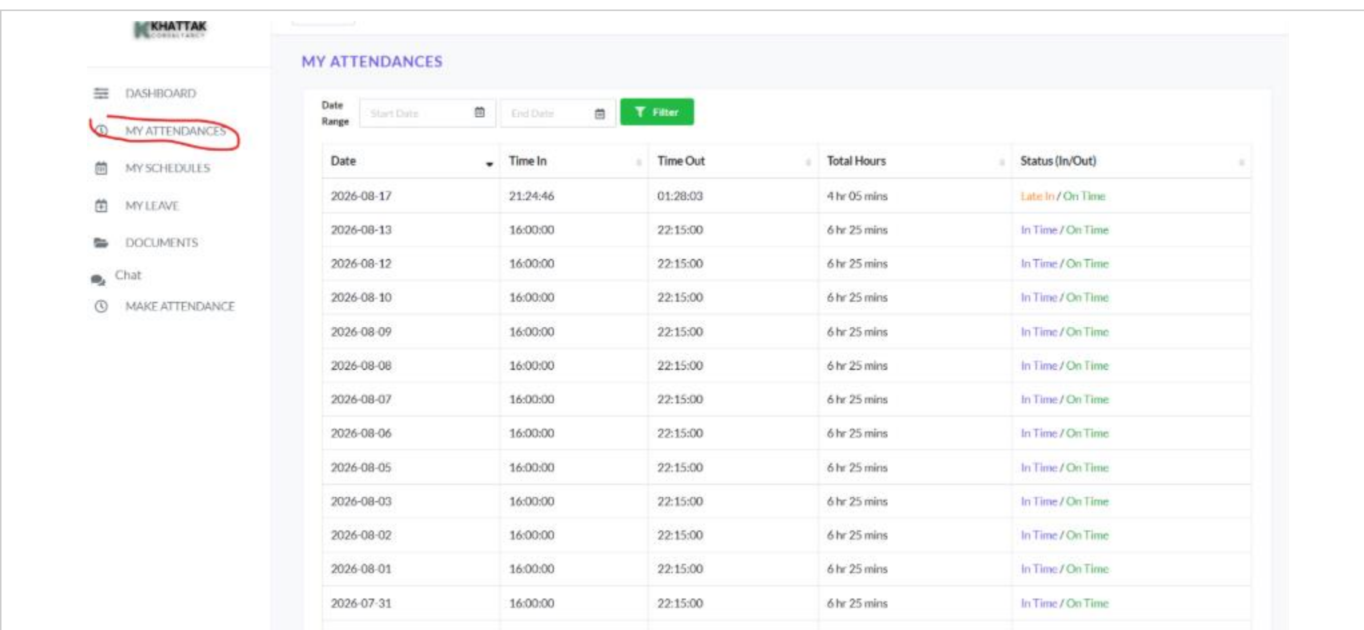
After signing in, the employee reaches their own Dashboard, which summarises their attendance for the current month (Late Arrivals, Early Departures), their present schedule (working hours and rest days), and their leave activity (Approved and Pending counts). It also displays Recent Attendances (a log of recent time in/out events), Previous Schedules, Recent Leaves of Absence, and a Visa Status card showing the visa type, expiry date, and time remaining.



The employee's personal Dashboard, showing attendance summary and recent activity.

2. Check Attendance

Under My Attendances, employees can view their own attendance history in a table showing Date, Time In, Time Out, Total Hours, and a Status column indicating whether they were Late In / On Time and On Time for their departure. A date range filter lets the employee narrow the list down to a specific period.



The My Attendances screen, showing a personal attendance history with status flags.

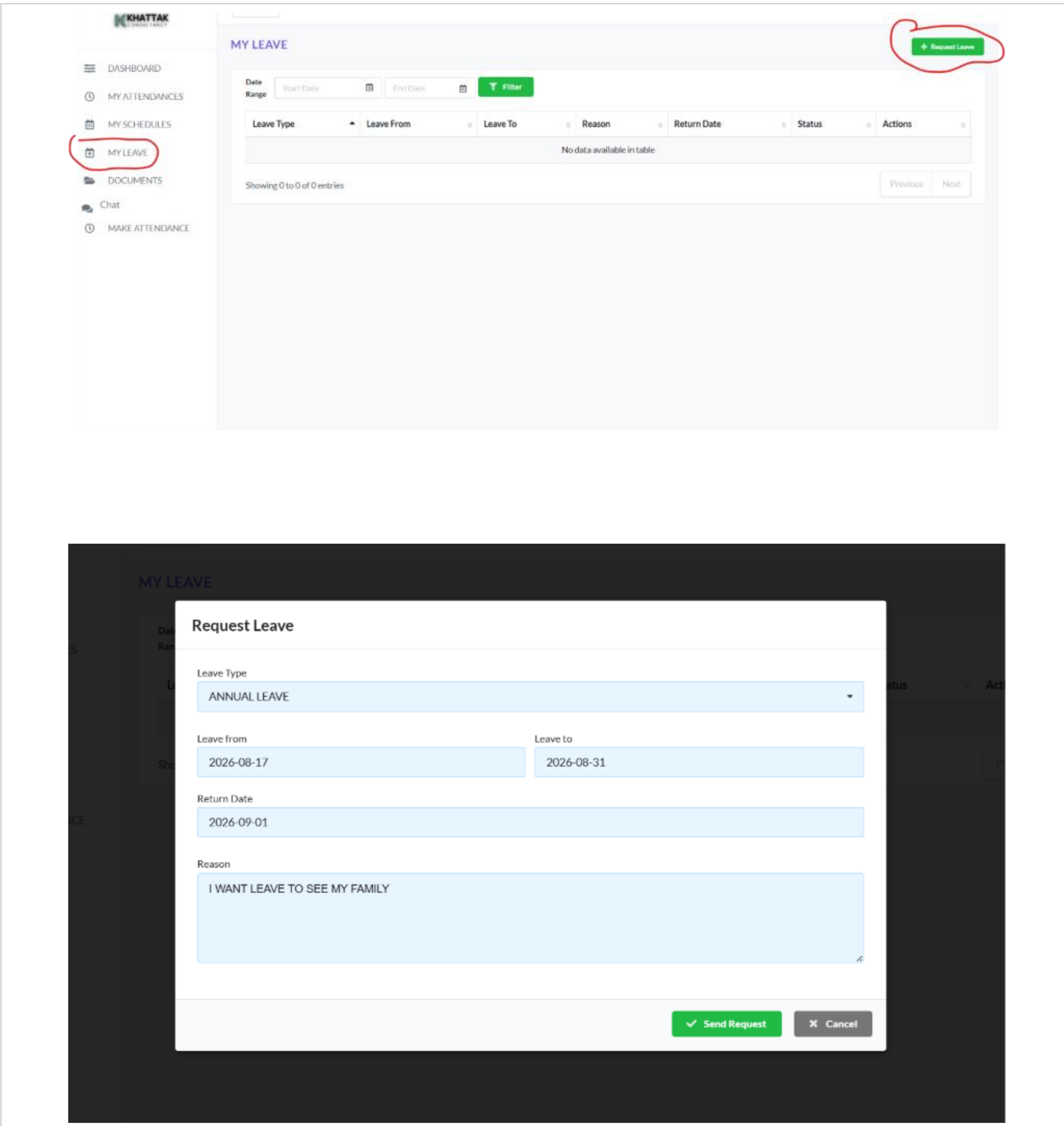
This gives employees transparency into their own logged hours and lets them spot and query any discrepancy (for example, a missed clock-out) directly, rather than needing to ask HR to look it up.

3. View Schedule and Apply for Leave

Under My Schedules, employees can see the rota that has been set for them by the admin, including their working days and hours for the current period.

Under My Leave, employees can view a table of their past and current leave requests (Leave Type, Leave From, Leave To, Reason, Return Date, Status, and Actions). Clicking + Request Leave opens a form where the employee specifies:

- Leave Type — chosen from the leave types set up by the admin, e.g. Annual Leave.
- Leave From and Leave To — the start and end dates of the requested absence.
- Return Date — the date the employee expects to be back at work.
- Reason — a free-text explanation for the request.

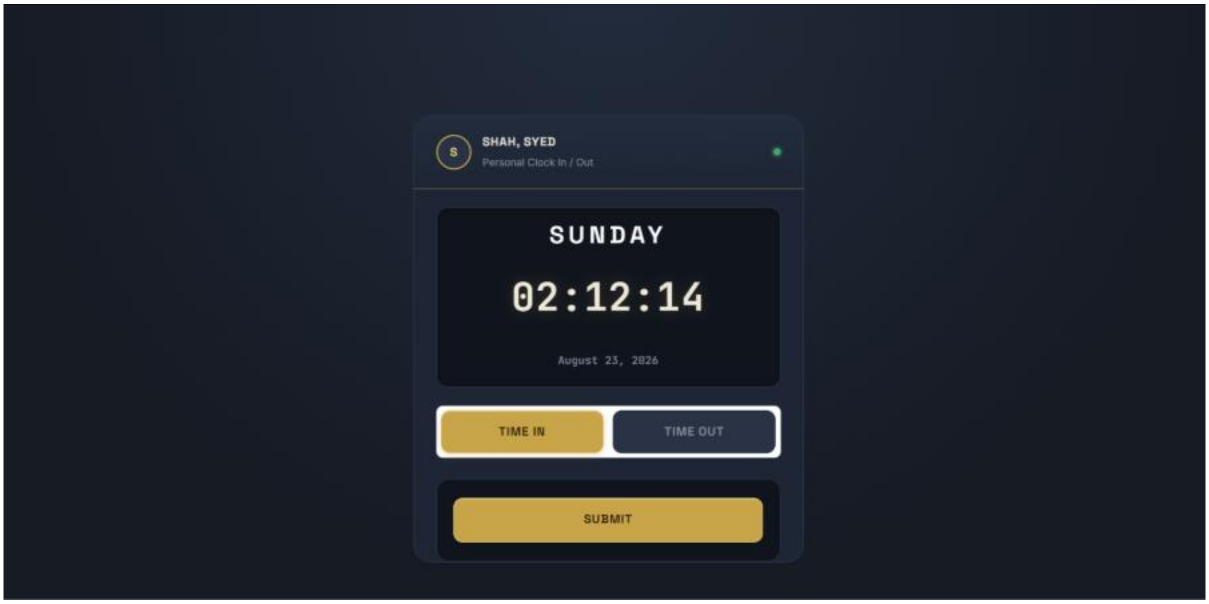


The Request Leave form on the employee side, ready to submit to the admin.

Once submitted with Send Request, the leave appears in the employee's list with a Pending status until the admin approves or declines it from the Manage Leaves screen described in Part 1.

4. Make Attendance (Clock In / Clock Out)

Under Make Attendance, employees have a personal version of the clock in/out widget. It shows the current day and time, and a Time In / Time Out toggle. After selecting the correct option for the moment (starting or ending a shift), the employee presses Submit to record the punch.



The employee's personal Make Attendance widget, with Time In/Time Out and Submit.

> ***Tip:*** *Always double-check the Time In / Time Out toggle before pressing Submit — this personal clock records straight into the same attendance log the admin reviews.*

5. Documents and Chat

The Documents section of the employee portal gives staff access to their own stored files (such as identification or contract documents that the admin has uploaded or that relate to their record).

The Chat section mirrors the admin's chat feature, letting the employee message HR or their manager directly, send images or files, and see when their messages have been read.