



User Manual

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Online: <https://docs.opencorehr.com>

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Welcome to Open Core HR

Open Core HR is your company's people and operations app. Employees use Self-Service for attendance, leave and personal records. HR teams and managers use the workspace for employees, approvals, reports and settings.

Choose your starting point

- **Employees:** [First login](#) and [Using Self-Service](#).
- **HR teams and managers:** [The HR & Admin guide](#).
- **Installers:** the separate [Installation & Administration guide](#).

Roles and optional modules

This public manual covers documented product features. Your company chooses which modules to enable and permissions to grant. Page labels identify required modules and applicable roles/permissions where supplied. Reading a page does not grant access to its feature.

If a screen is missing, ask your HR administrator to check your access and module enablement. Microsoft 365 features require your company's configured tenant and integration.

Online and offline help

Use docs.opencorehr.com, download a PDF from its homepage, or open `Documentation/index.html` in the offline release package. Offline documentation does not require an application login. Choose the documentation version matching your installed release.

In the workspace, use **Documentation** in the footer. In Self-Service, use the **Help & Documentation** menu entry. Both open this public manual.

Your first login

The first time you open Open Core HR, you sign in with your work email address and the temporary password your HR or IT team gave you. After you're in, change the temporary password to one only you know (see [Changing your password](#)).

Steps

1. Open the Open Core HR sign-in page in your web browser.
2. In the **Email** field, enter your company email address. This is your username.
3. In the **Password** field, enter the temporary password HR gave you. You can tap the eye icon in the field to show what you typed.
4. If you're on your own device, you can tick **Remember me** so you don't have to type your email next time.
5. Select **Sign in**.

What you'll see

After you sign in, Open Core HR opens to the area your role uses - either the workspace (for HR, managers, and admins) or the Self-Service portal (for everyone else). Some accounts can switch between the two; see [Finding your way around](#).

Troubleshooting

- **"Invalid username or password"** - Check that you typed your work email address exactly, with no extra spaces. If it still doesn't work, ask HR to confirm your email address and reset your temporary password.
- **"Your account is not active"** - Your account hasn't been activated yet, or has been paused. Contact HR.
- **You've lost the temporary password** - HR can reset it for you and send you a new one.

Changing your password

You can change your Open Core HR password at any time from your profile menu. Do this soon after your first login so the temporary password from HR is replaced with one only you know.

1. **Change Password** - Click your name and photo at the top right, then choose **Change Password**.
2. **Current Password** - Type the password you sign in with today.
3. **New Password** - Pick a new password you don't use anywhere else.
4. **Confirm New Password** - Type the new password again to confirm.
5. **Save** - Save the new password - the next time you sign in, use this one.

Steps

1. Select your name and photo at the top right of the screen.
2. Choose **Change Password**.
3. In **Current Password**, enter the password you use now.
4. In **New Password**, enter the new password you want.
5. In **Confirm New Password**, type the new password again.
6. Select **Change Password** to save.

Tips

- If your company uses Microsoft 365, this is also your email and calendar password - changing it here updates your work account too.
- If **Current Password** is rejected, double-check it. If you've forgotten it, ask HR to reset it for you.

Finding your way around Self-Service

Self-Service is your personal area in Open Core HR. It has a green menu running down the left side, a bar across the top, and the main content area in between.

1. **The menu** - The green menu down the left lists everything you can do for yourself - leave, attendance, expenses, documents and more.
2. **The top bar** - Search, the app switcher, the theme toggle, your notifications and your profile menu.

The left menu

- The menu lists everything you can do for yourself - your dashboard, attendance, leave, expenses, announcements, tasks, holidays, documents, assets, loans, HR policies, warnings and appeals.
- Items with a small arrow next to them (like **Leave** or **Expenses**) expand to show more options when you select them.
- The menu is the same on every screen - you don't lose it as you move between pages.

The top bar

- **Search** - jump quickly to a page or look something up.
- **App switcher** (grid icon) - open other Open Core HR apps your company uses. If you only have access to Self-Service, you'll only see Self-Service here.
- **Theme** (sun/moon icon) - switch between **Light**, **Dark**, and **System** appearance.
- **Notifications** (bell icon) - recent alerts, approvals on your requests, announcements aimed at you.
- **Your profile menu** - your name and photo at the far right. It has **My Profile**, **Change Password**, and **Logout**.

The Docs link

The **Help & Documentation** entry opens the public manual. It describes features for different roles and optional modules; your company configuration determines which screens are available to you.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Finding your way around

Open Core HR has a left menu, a top bar, and the main content area. This page explains what's where and how to move between the two parts of the app.

1. **The menu** - The left menu lists every area you can open. It collapses to icons with the arrow at the bottom.
2. **The top bar** - Search, the Settings gear, the app switcher, the theme toggle, your notifications and your profile menu.

The left menu

- The menu runs down the left side and is grouped into sections (for example, **Human Resources**, **Workforce Management**, **Settings**).
- You only see the items your role allows, so your menu may be shorter than a colleague's.
- You can collapse the menu to icons only to give the page more room, and expand it again - Open Core HR remembers your choice.

Documentation

The **Documentation** link in the workspace footer opens the public manual in a new tab.

The top bar

- **Search** - the search box (also opened with Ctrl+K or Cmd+K) lets you jump to pages, and, in the workspace, look up employees.
- **Settings** (gear icon) - for administrators, this opens the company settings area.
- **App switcher** (grid icon) - lists the Open Core HR apps you can open, including Self-Service and any other apps your company has connected.
- **Theme** (sun/moon icon) - switch between **Light**, **Dark**, and **System** appearance.
- **Notifications** (bell icon) - your recent alerts.
- **Your profile menu** - your name and photo at the far right. It has **My Profile**, **Change Password**, and **Logout**.

The two areas

- **The workspace** is the HR, manager, and admin side - the employee directory, approvals, reports, settings, and so on.
- **The Self-Service portal** is your personal area - your profile, leave, attendance, expenses, and documents.

If your account can use both, switch between them with the **app switcher** (the grid icon in the top bar) and pick **Workspace** or **Self Service**. If your account only has one of them, you'll always land there when you sign in.

Using Self-Service

Self-Service is your personal area of Open Core HR. It is where you check your profile, apply for leave, submit expenses, view your attendance, read announcements, and more.

Opening Self-Service

You can reach Self-Service in two ways:

1. Click the **apps** button (the grid icon) in the top bar, then choose **Self Service**.
2. Click your name or photo in the top-right corner, then choose **My Profile** - this opens Self-Service on your profile page.

Once you are in Self-Service, the green left-hand menu stays with you as you move between pages.

What's in the menu

The left menu groups everything you can do for yourself:

- **Dashboard** - a summary of your leave, attendance, announcements and upcoming events. See [Your dashboard](#).
- **Help & Documentation** - opens the public documentation site.
- **Attendance** - your attendance records and today's check-in status.
- **Leave** - apply for leave, view your leave requests, check your leave balance, and request a compensatory off.
- **Expenses** - submit expense claims and view the ones you have already submitted.
- **Announcements** - company notices for you and your location.
- **Tasks** - tasks assigned to you.
- **Holidays** - the holiday list for the year at your location. See [Holidays](#).
- **Documents** - your personal documents.
- **My Assets** - equipment assigned to you.
- **My Loans** - loans recorded against you.
- **HR Policies** - policies you can read and acknowledge.
- **My Warnings** - disciplinary warnings issued to you.
- **My Appeals** - appeals you have raised against warnings.

Your profile is not in this menu - open it from the **My Profile** link under your name in the top-right corner. See [Your profile](#).

Note

Some menu items only appear if your organisation uses that feature or your account has access to it. If you don't see something listed here, it may not be enabled for you.

Your dashboard

The dashboard is the first page you see in Self-Service. It gives you a quick picture of your leave, attendance, announcements and what's coming up. Open **Dashboard** in the Self-Service menu at any time.

1. **Dashboard** - Open **Dashboard** from the menu.

What you'll see

At the top, a welcome banner greets you by your first name and shows today's date.

Below that, four summary tiles:

- **Pending Leaves** - how many of your leave requests are still waiting for a decision.
- **Days Taken** - the total number of leave days you have taken this year.
- **Present This Month** - the number of days you have been present this month.
- **Today** - your attendance status for today (for example, **Present** or **Not Checked In**).

Then the page is split into sections:

- **Leave Balance** - a bar for each of your leave types showing how many days are available and how many you have used. If you have any loss-of-pay (LOP) days, they are shown here too. If you have no balances set up, this section says so.
- **Quick Actions** - shortcut buttons for **Apply Leave**, **Submit Expense**, **View Today** and **Leave Balance**.
- **Latest Announcements** - the most recent company notices, with a short preview of each and an **Expires Soon** marker on any that are about to end.
- **Upcoming Events** - your approved upcoming leave and upcoming holidays, listed by date, each tagged **Leave** or **Holiday**.
- **Recent Leave Requests** - your latest leave requests with their dates and status (for example, **pending**, **approved**, **rejected**). Use **View All** to open your full leave list.

Tips

- The **Quick Actions** buttons are the fastest way to start a leave request or an expense claim.
- For the full announcement text or any attachments, open **Announcements** from the menu.
- The leave balance bars change colour as you use more of a leave type, so a quick glance tells you how much you have left.

Your profile

Your profile shows your work and personal details and lets you keep some of them up to date. Open it from the **My Profile** link under your name in the top-right corner.

1. **My Profile** - Click your name and photo at the top right, then choose **My Profile**.

What you'll see

At the top, a header card with your photo, your full name, your email, your joining date and a status badge (for example, **active**). Hover over the photo to change it - see [Changing your profile picture](#).

Below the header, the page is laid out in two columns.

On the left:

- **About** - your full name, role, status, language, employee code, department, designation, location, shift and who you report to. These come from your HR record and are shown for reference only.
- **Contacts** - your phone, alternate phone and email.
- **Security** - a **Change Password** button. See [Changing your password](#).

On the right:

- **Edit Contact Info** - a short form where you can update your phone, alternate phone and address. See [Updating your basic information](#).
- **Emergency Contact & Personal Info** - a form for your blood group and emergency contact details. See [Updating your personal information](#).
- **Activity Timeline** - a log of recent changes to your profile, showing what changed and when.

Tips

- If a detail under **About** is wrong (such as your department or who you report to), ask your HR team to correct it - you cannot edit those fields yourself.
- Anything you can change has its own **Save** button. Changes aren't kept until you click it.

Updating your basic information

You can keep your contact details current from your profile page. This is the **Edit Contact Info** card.

1. **My Profile** - Click your name and photo at the top right, then choose **My Profile**.
2. **Edit Contact Info** - Update your name, email and phone, then save.

Steps

1. Open **My Profile** from the menu under your name in the top-right corner.
2. Find the **Edit Contact Info** card.
3. Update any of these:
 - **Phone** - your main phone number (digits only).
 - **Alternate Phone** - a second number, if you have one (digits only).
 - **Address** - your address.
4. Click **Save Contact Info**.

You'll see a confirmation message once your changes are saved.

Tips

- The phone fields accept numbers only, up to 15 digits.
- Leaving a field blank clears it.
- This change is also recorded in your profile's **Activity Timeline**.

Updating your personal information

You can record your blood group and emergency contact details from your profile page. This is the **Emergency Contact & Personal Info** card.

1. **My Profile** - Click your name and photo at the top right, then choose **My Profile**.
2. **Emergency Contact & Personal Info** - Update your personal details and emergency contact, then save.

Steps

1. Open **My Profile** from the menu under your name in the top-right corner.
2. Find the **Emergency Contact & Personal Info** card.
3. Update any of these:
 - o **Blood Group** - choose from the list (A+, A-, B+, B-, AB+, AB-, O+, O-).
 - o **Relation** - your emergency contact's relationship to you (Father, Mother, Spouse, Sibling, Other).
 - o **Emergency Contact Name** - the person's name.
 - o **Emergency Contact Number** - their phone number (digits only).
4. Click **Save Personal Info**.

You'll see a confirmation message once your changes are saved.

Tips

- The contact number accepts numbers only, up to 15 digits.
- Keeping your emergency contact up to date helps your HR team reach someone quickly if needed.

Changing your password

You can change your sign-in password from your profile page at any time.

1. **Change Password** - Click your name and photo at the top right, then choose **Change Password**.
2. **Current Password** - Type the password you sign in with today.
3. **New Password** - Pick a new password you don't use anywhere else.
4. **Confirm New Password** - Type the new password again to confirm.
5. **Save** - Save the new password.

Steps

1. Open **Change Password** from the menu under your name in the top-right corner. (You can also open **My Profile** and click **Change Password** in the **Security** card.)
2. In the **Change Password** window, enter your **Current Password**.
3. Enter your **New Password**.
4. Enter the same new password again in **Confirm New Password**.
5. Click **Change Password**.

You'll see a confirmation message once your password is changed. Use the new password the next time you sign in.

Tips

- Your new password must be at least 6 characters long.
- If you have a Microsoft 365 account through Open Core HR, your new password is applied there too.

Troubleshooting

- **"Current password is incorrect"** - re-enter your existing password and try again.
- **The new password and confirmation don't match** - make sure both boxes contain exactly the same password.

Changing your profile picture

You can upload or replace your profile photo from your profile page. It's the round photo at the top of the page.

1. **My Profile** - Click your name and photo at the top right, then choose **My Profile**.

Steps

1. Open **My Profile** from the menu under your name in the top-right corner.
2. Move your pointer over the photo at the top of the page - a camera icon appears.
3. Click the photo.
4. Choose an image file from your device.

Your new photo is uploaded and the page refreshes to show it. You'll see a confirmation message.

Tips

- Use a JPG or PNG image, up to 5 MB.
- Uploading a new photo replaces the old one.

Troubleshooting

- **"Failed to update profile picture"** - check that the file is a JPG or PNG and under 5 MB, then try again.

Your notifications

The notifications page lists messages Open Core HR has sent you - for example, updates on your leave requests, announcements and exports. Open the **bell** icon in the top bar to see recent notifications, and from there you can open the full list.

1. **View all** - Click the bell on the top bar, then choose **View all**.

What you'll see

Each notification shows a title, a short message and how long ago it arrived. Unread notifications are highlighted and have a dot next to them.

Above the list:

- **All / Unread** - switch between every notification and only the ones you haven't read.
- **Mark all as read** - clears the unread highlight on everything.
- **Clear all** - removes all your notifications.

If there are more notifications than fit on screen, use **Load more** at the bottom to show older ones.

Steps

To work through your notifications:

1. Click a notification to mark it as read. If it relates to something you can open - such as a leave request - you are taken straight to that page.
2. To remove a single notification, click the **trash** icon on its row.
3. To mark everything as read without opening it, click **Mark all as read**.
4. To empty the list, click **Clear all**.

Tips

- Use the **Unread** filter to quickly see what's new.
- Clearing a notification only removes it from your list - it doesn't undo whatever the notification was about.

Your attendance

The **My Attendance** screen shows your attendance history along with a snapshot of how the current month is going. Open it from **Self-Service > Attendance > My Attendance**.

1. **Attendance** - Open the **Attendance** group in the menu.
2. **My Attendance** - Then choose **My Attendance**.

What you'll see

At the top of the page there are summary cards for the current month:

- **Present Days**
- **Total Hours**
- **Avg Hours/Day**
- **Late Arrivals**
- **Total Distance**

Below the cards is a table of your attendance records, newest first, with these columns:

- **Date** (with the day of the week underneath)
- **Check In** - your first check-in time, or **--:--** if you haven't checked in
- **Check Out** - your last check-out time. If you're still checked in, you'll see an **Active** badge instead.
- **Total Hours** - total working hours for that day
- **Shift** - the shift that day was recorded against
- **Sessions** - how many check-in/check-out sessions you had that day (shown only if your account allows multiple check-ins)
- **Actions**

Steps

Filter the list

1. Use the **From Date** and **To Date** pickers above the table to limit records to a date range.
2. Type in the **Search attendance...** box to search within the table.
3. Click **Clear** to remove the date filters.

View a day's details

1. Click the view (eye) button in the **Actions** column for the day you want.
2. A panel titled **Attendance Details** slides in from the right showing the status, check-in and check-out times, working hours, shift, and any late, early-leave, or overtime amounts.
3. If that day had more than one session, each one is listed under **Sessions**. Break times, if any, appear under **Breaks**.

Tips

- Use the **Today** button in the top-right corner to jump to today's attendance screen, where you can check in and out.

Today's attendance status

The **Today's Attendance** screen shows where you stand for the day - whether you're checked in, your check-in and check-out times, working hours so far, and a breakdown of your sessions. Open it from **Self-Service > Attendance > Today**, or by clicking the **Today** button on the My Attendance screen.

1. **Attendance** - Open the **Attendance** group in the menu.
2. **Today** - Then choose **Today**.

What you'll see

The left side of the screen shows a status card:

- A live clock.
- A status badge: **Not Checked In**, **Checked In**, or **Completed**.
- **First Check-in** and **Last Check-out** times.
- **Working Hours** and **Distance** for the day.
- Alerts if you were **Late by** a certain amount or earned **Overtime**.
- A check-in or check-out button, depending on your current status.

If a shift is recorded for the day, a **Shift Information** card appears below with the shift name, start time, end time, and break duration.

The right side shows:

- **Check-in/out Sessions** - a table of each session with its check-in time, check-out time (or an **Active** badge if it's still open), and duration. A summary row shows **Total Sessions**, **Total Duration**, and **Active Sessions**.
- **Activity Timeline** - a time-ordered list of your check-in and check-out events for the day.

If your account allows multiple check-ins, you'll see a **Multiple check-ins enabled** badge on the Sessions card.

Tips

- This screen refreshes itself after you check in or check out, so the times and totals update right away.
- To check in or out from here, see [Checking in and out](#).

Checking in and out

You record your attendance from the **Today's Attendance** screen. Open it from **Self-Service > Attendance > Today**. Your browser will ask for location access - you need to allow it, because your check-in and check-out are recorded with your location.

1. **Attendance** - Open the **Attendance** group in the menu.
2. **Today** - Then choose **Today**.
3. **Check In** - Start your work day - your time and location are recorded.
4. **Check Out** - End your day when you finish work - your check-out time is recorded.

Steps

Check in

1. Go to **Self-Service > Attendance > Today**.
2. If your browser prompts for location, choose to allow it.
3. Click **Check In Now**.
4. A confirmation message appears and the screen updates to show you're checked in, with the time recorded.

Check out

1. On the **Today's Attendance** screen, click **Check Out**.
2. A confirmation message appears and the screen updates with your check-out time and total working hours.

Check in again (multiple sessions)

If your account allows multiple check-ins, after you check out you'll see a **Check In Again** button. Click it to start another session for the day. The screen shows which session number you're starting.

What you'll see

- After checking in, the status badge changes to **Checked In** and the **First Check-in** time is filled in.
- After checking out, the status badge changes to **Completed** and **Working Hours** is updated.
- Each session appears in the **Check-in/out Sessions** table and the **Activity Timeline**.

Troubleshooting

- **"Location access is required to check in."** - Your browser blocked location access. Enable location for this site in your browser settings, then try again. The screen also shows a "Location access is blocked" notice when this happens.
- **"Geolocation is not supported by your browser."** - Try a different, up-to-date browser.
- **"No shift is assigned to your account."** - Contact your administrator so a shift can be assigned before you check in.
- **"You are already checked in. Please check out first."** - You already have an open session. Check out before checking in again.
- **"You have already completed your work for today."** - You've already checked out and your account doesn't allow another check-in for the day.

Your attendance sessions for a day

A "session" is one check-in paired with the matching check-out. On a day where you check in and out more than once, each pair is a separate session. Open Core HR shows your sessions in two places.

1. **Attendance** - Open the **Attendance** group in the menu.
2. **My Attendance** - Then choose **My Attendance**.

On the Today's Attendance screen

1. Go to **Self-Service > Attendance > Today**.
2. The **Check-in/out Sessions** table lists every session for today with its check-in time, check-out time (or an **Active** badge if it's still open), and duration.
3. A summary row shows **Total Sessions**, **Total Duration**, and **Active Sessions**.
4. The **Activity Timeline** below shows the same check-in and check-out events in time order.

For a past day

1. Go to **Self-Service > Attendance > My Attendance**.
2. Find the day you want and click the view (eye) button in the **Actions** column.
3. The **Attendance Details** panel opens. If that day had any sessions, they appear under **Sessions**, each numbered with its check-in time, check-out time, and duration. An **Active** badge marks a session that was still open.
4. Any breaks for that day appear under **Breaks**, with start and end times and total break minutes.

Your monthly attendance summary

Open Core HR keeps a running summary of your attendance for the current month. You'll see it at the top of the **My Attendance** screen.

1. **Attendance** - Open the **Attendance** group in the menu.
2. **My Attendance** - Then choose **My Attendance**.

Where to find it

1. Go to **Self-Service > Attendance > My Attendance**.
2. The cards across the top of the page summarise the current month:
 - o **Present Days** - the number of days you have an attendance record.
 - o **Total Hours** - total working hours recorded this month.
 - o **Avg Hours/Day** - average working hours per present day.
 - o **Late Arrivals** - the number of days you arrived late.
 - o **Total Distance** - total distance recorded for the month.
3. The table below shows the individual days that make up these totals. Use the **From Date** and **To Date** filters to focus on a particular stretch of the month.

Tips

- The summary cards always reflect the current calendar month. To review an earlier period, use the date filters on the table below.

Applying for leave

Use the **Apply for Leave** form to request time off. Open it from **Self-Service > Leave > Apply Leave**, or from the **Apply Leave** button on the My Leaves or Leave Balance screens.

1. **Leave** - Open the **Leave** group in the menu.
2. **Apply Leave** - Then choose **Apply Leave**.
3. **Leave Type** - Pick a leave type - your remaining balance is shown beside each one.
4. **From Date** - Choose the start date.
5. **To Date** - Choose the end date. The form works out how many working days that is.
6. **Reason** - A short reason for your request.
7. **Submit Leave Request** - Send it to your approver.

Steps

1. Go to **Self-Service > Leave > Apply Leave**.
2. Pick a **Leave Type**. Each type shows how much you have available next to its name.
3. Choose the **From Date** and **To Date**.
4. The form shows how many **working days** that range works out to (it skips weekends and holidays). If you have less balance than the days requested, it shows a **Breakdown** with how many are **Paid** and how many would be **LOP** (loss of pay).
5. If you only need part of a day, turn on **Half Day Leave** and choose **First Half** or **Second Half**. A half day must be for a single date.
6. Enter the **Reason** for your leave.
7. If the leave type needs proof, a **Supporting Document** field appears. Attach a PDF, JPG, or PNG (up to 5 MB).
8. If you'll be **Travelling Abroad**, turn that on and enter the location.
9. Optionally fill in an **Emergency Contact** name and **Emergency Phone** number.
10. Click **Submit Leave Request**. You'll be taken back to the My Leaves list, where the request appears with a **Pending** status.

What you'll see

- A sidebar on the right shows your **Leave Balance** for each leave type, with a bar showing how much you've used. The type you've selected is highlighted.
- The day count and Paid/LOP breakdown update as you change the dates or toggle half day.

Troubleshooting

- **"Half-day leave must be for a single date."** - Set the From Date and To Date to the same day.
- **"You already have a leave request for the selected dates."** - You already have a pending or approved request that overlaps those dates. Cancel or adjust it first.
- **Supporting document errors** - Only PDF, JPG, and PNG files are allowed, and the file must be under 5 MB. For sick leave, a document may be required only for the second and later requests in the same month.

- Other messages about advance notice, monthly or yearly limits, or balance come from your organisation's leave rules. Adjust your dates or leave type and try again, or check with HR.

Your leave requests

The **My Leave Requests** screen lists every leave request you've made, with its current status. Open it from **Self-Service > Leave > My Leaves**.

1. **Leave** - Open the **Leave** group in the menu.
2. **My Leaves** - Then choose **My Leaves**.

What you'll see

Cards at the top count your requests by status: **Total**, **Pending**, **Approved**, **Rejected**.

If you have leave balance and upcoming approved leaves, two panels appear below the cards: **Leave Balance Overview** (with a **View All** link to the balance page) and **Upcoming Approved Leaves**.

The table has these columns:

- **Leave Type**
- **From** and **To**
- **Days** - total days, with a small Paid/LOP breakdown underneath if some days are loss of pay
- **Status** - **Pending**, **Approved**, **Rejected**, **Cancelled**, or **Cancelled by admin**
- **Applied On**
- **Actions**

Steps

Filter the list

1. Use the **Status** and **Leave Type** dropdowns above the table.
2. Use the **From Date** and **To Date** pickers to limit by date.
3. Type in the **Search leave requests...** box to search the table.
4. Click **Clear** to reset the filters.

Open, cancel, or apply

- Click the view (eye) button in the **Actions** column to see a request's full details. See [Viewing a leave request](#).
- For a **Pending** request, an extra cancel button appears in the **Actions** column. See [Cancelling a leave request](#).
- Use the **Apply Leave** button (top right) to make a new request, or **View Balance** to open your leave balance.

Viewing a leave request

You can open any leave request to see its full details and current status.

1. **Leave** - Open the **Leave** group in the menu.
2. **My Leaves** - Then choose **My Leaves**.

Steps

1. Go to **Self-Service > Leave > My Leaves**.
2. Find the request in the table and click the view (eye) button in the **Actions** column.
3. The **Leave Request Details** window opens.

What you'll see

The details window shows:

- **Leave Type** and **Status**
- **From** and **To** dates
- **Total Days**
- **Applied On**
- **Half Day** (and which half) if it was a half-day request
- **Approved By** - who approved it, once it's approved
- **Leave Breakdown** - how many days are **Paid** and, if any, how many are **LOP**
- **Reason**
- **Abroad Location**, if you marked the leave as travelling abroad
- **Emergency Contact** and **Emergency Phone**, if you entered them
- **Attachment** - a **Download Document** link if you attached supporting proof

If the request is still **Pending**, a **Cancel Leave Request** button appears at the bottom of the window. See [Cancelling a leave request](#).

Cancelling a leave request

You can cancel a leave request you no longer need. You can cancel a **Pending** request at any time, and an **Approved** request only if it hasn't started yet.

1. **Leave** - Open the **Leave** group in the menu.
2. **My Leaves** - Then choose **My Leaves**.

Steps

1. Go to **Self-Service > Leave > My Leaves**.
2. For a **Pending** request, click the cancel button in the **Actions** column. (You can also open the request with the view button and use the **Cancel Leave Request** button at the bottom of the details window.)
3. In the **Cancel Leave Request** confirmation, click **Yes, Cancel Leave** to confirm, or **No, Keep It** to back out.
4. The request's status changes to **Cancelled**.

What you'll see

- A confirmation message appears and the list refreshes.
- If the leave was already approved, your leave balance is returned to you when it's cancelled.

Troubleshooting

- **"Cannot cancel approved leave that has already started or passed."** - Approved leave can only be cancelled before its start date. Talk to HR if you need to change leave that has already begun.
- If the cancel button isn't shown for a request, it isn't in a state that you can cancel yourself.

Your leave balance

The **Leave Balance** screen shows how much leave you have for the current year, broken down by leave type. Open it from **Self-Service > Leave > Leave Balance**, or from the **View Balance** button on the My Leaves screen.

1. **Leave** - Open the **Leave** group in the menu.
2. **Leave Balance** - Then choose **Leave Balance**.

What you'll see

Summary cards at the top show your totals across all leave types:

- **Total Entitled**
- **Used**
- **Available**
- **LOP Days**

Below that, each leave type has its own card with:

- A bar showing how much you've used out of your total.
- **Entitled**, **Carried Forward**, **Additional**, and **Available** values.
- An **LOP** note if any loss-of-pay days were taken against that type.

If you have any, panels for **Upcoming Leaves** and **Recent Leave History** appear next.

A **Detailed Breakdown** table lists every leave type with columns for **Entitled**, **Carried Forward**, **Additional**, **Total**, **Used**, **Available**, and **LOP**.

If you have available compensatory offs, an **Available Compensatory Offs** table lists each one with its **Worked Date**, **Days**, and **Expiry Date**, and a badge showing your total comp-off days available.

Tips

- Use the **Apply Leave** button at the top right to start a new request.

Balance for a leave type

Every leave type's balance is shown on the **Leave Balance** screen - there's no separate page for a single type. Open the screen from **Self-Service > Leave > Leave Balance**.

1. **Leave** - Open the **Leave** group in the menu.
2. **Leave Balance** - Then choose **Leave Balance**.

Where to find it

1. Go to **Self-Service > Leave > Leave Balance**.
2. Each leave type has its own card showing:
 - A bar showing **Used** out of the type's total.
 - **Entitled, Carried Forward, Additional, and Available**.
 - An **LOP** note if loss-of-pay days were taken against that type.
3. The **Detailed Breakdown** table lower on the page lists the same numbers for every type in one place, including the **Total** for each.

When you go to apply for leave, the **Apply for Leave** form also shows the available balance next to each leave type and, in its sidebar, a per-type balance with a usage bar.

Your compensatory-off balance

Your available compensatory offs (comp-offs you've earned that are approved and not yet used or expired) show up in a couple of places in the self-service portal.

1. **Leave** - Open the **Leave** group in the menu.
2. **Leave Balance** - Then choose **Leave Balance**.

On the Leave Balance screen

1. Go to **Self-Service > Leave > Leave Balance**.
2. If you have any available comp-offs, an **Available Compensatory Offs** section appears near the bottom, with a badge showing your total comp-off days available and a table listing each one's **Worked Date**, **Days**, and **Expiry Date**.

On the My Compensatory Offs screen

1. Go to **Self-Service > Leave > Compensatory Off**.
2. The cards at the top include an **Available** count, alongside **Total Earned**, **Used**, **Expired**, and **Pending**.

When applying for leave

If your organisation has a compensatory-off leave type, picking it on the **Apply for Leave** form shows how many comp-off days you have available, and the request draws from your oldest comp-offs first.

Your compensatory offs

The **My Compensatory Offs** screen lists the comp-offs you've earned for extra hours worked, along with their status. Open it from **Self-Service > Leave > Compensatory Off**.

1. **Leave** - Open the **Leave** group in the menu.
2. **Compensatory Off** - Then choose **Compensatory Off**.

What you'll see

Cards at the top summarise your comp-offs:

- **Total Earned**
- **Available**
- **Used**
- **Expired**
- **Pending**

The table has these columns:

- **Worked Date** - the date you worked the extra hours
- **Hours** - hours worked
- **Days** - comp-off days that converts to
- **Expiry Date** - when the comp-off lapses if unused
- **Status** - **Pending**, **Approved**, or **Rejected**
- **Usage** - **Available**, **Used**, **Expired**, or a dash
- **Actions**

Steps

Filter the list

1. Use the **Status** dropdown above the table (**All Statuses**, **Pending**, **Approved**, **Rejected**).
2. Use the **From Date** and **To Date** pickers to limit by worked date.
3. Type in the **Search compensatory offs...** box to search the table.
4. Click **Clear** to reset the filters.

Open or edit a comp-off

- Click the view (eye) button in the **Actions** column to see a comp-off's details.
- For a **Pending** comp-off, an edit (pencil) button also appears. See [Editing a compensatory-off request](#).

Request a new comp-off

Use the **Request Comp Off** button at the top right. See [Requesting a compensatory off](#).

Requesting a compensatory off

If you worked extra hours, you can request a compensatory off so the time can be taken later. Open the **My Compensatory Offs** screen from **Self-Service > Leave > Compensatory Off**.

1. **Leave** - Open the **Leave** group in the menu.
2. **Compensatory Off** - Then choose **Compensatory Off**.

Steps

1. On the **My Compensatory Offs** screen, click **Request Comp Off**.
2. In the **Request Compensatory Off** panel that slides in, fill in:
 - o **Worked Date** - the date you put in the extra hours (must be today or earlier).
 - o **Hours Worked** - the number of hours.
 - o **Comp Off Days** - this fills in automatically based on the hours you entered (every 4 hours counts as half a day). You can't edit it directly.
 - o **Reason** - why you're requesting the comp-off.
3. Click **Submit Request**.
4. Confirm in the **Submit Compensatory Off Request?** dialog by clicking **Yes, Submit**.
5. A confirmation appears and the new request shows in the list with a **Pending** status, waiting for approval.

Troubleshooting

- **"A compensatory off request already exists for this date."** - You already have a pending or approved comp-off for that worked date. Edit the existing one instead.
- If the **Submit Request** button does nothing, check that all four fields are filled in.

Editing a compensatory-off request

You can change a compensatory-off request while it's still **Pending**. Once it's approved or rejected, it can't be edited.

1. **Leave** - Open the **Leave** group in the menu.
2. **Compensatory Off** - Then choose **Compensatory Off**.

Steps

1. Go to **Self-Service > Leave > Compensatory Off**.
2. Find the **Pending** request and click the edit (pencil) button in the **Actions** column. (You can also open it with the view button and use the **Edit** button in the details window.)
3. In the **Edit Compensatory Off** panel, update the **Worked Date**, **Hours Worked**, or **Reason**. The **Comp Off Days** value recalculates automatically from the hours.
4. Click **Update Request**.
5. A confirmation appears and the list refreshes with your changes.

Troubleshooting

- If you don't see an edit button for a request, it's no longer pending and can't be changed.
- If **Update Request** does nothing, check that all four fields are filled in.

Requires Expenses module

Submitting an expense

Use the **Submit Expense** form to create an expense claim for reimbursement. One claim can contain several items. Open it from **Self-Service > Expenses > Submit Expense**, or from the **Submit Expense** button on the My Expenses screen.

1. **Expenses** - Open the **Expenses** group in the menu.
2. **Submit Expense** - Then choose **Submit Expense**.
3. **Expense Type** - Pick the kind of expense you are claiming.
4. **Expense Date** - When the expense happened.
5. **Amount** - How much you spent.
6. **Submit Expense** - Send it for approval.

Steps

1. Go to **Self-Service > Expenses > Submit Expense**.
2. Choose the **Expense Date** (must be today or earlier).
3. Optionally add **Notes** for the whole claim.
4. For each item under **Expense Items**:
 - Pick an **Expense Type**. Some types show a maximum amount underneath. Distance-based types are labelled **(Auto)** - see [Travel-expense claims](#).
 - Enter the **Amount**. For most types this is required; for distance-based types the amount is calculated for you.
 - Optionally add **Notes** for the item.
 - Attach a **Receipt** (image or PDF). For some expense types a receipt is required, shown with a red asterisk.
5. Click **Add Item** to add more items, or the trash button on an item to remove it. The running **Total** is shown near the top.
6. Click **Submit Expense**. You'll be taken back to the My Expenses list, where the claim appears with a **Pending** status.

What you'll see

- The **Total** at the top of the form adds up the amounts of all items.
- If your organisation has expense guidelines or policies, they're shown on the My Expenses screen under **Expense Guidelines & Policies**.

Troubleshooting

- **"Amount is required" / "Expense type is required" / "Receipt is required for this expense type"** - Fill in the missing field on that item.
- **"A travel (distance-based) expense request already exists for [date]. Only one travel expense is allowed per day."** - You already have a travel item for that date on another claim. Use that one or pick a different date.
- Messages about amounts exceeding a policy limit come from your organisation's expense rules - adjust the amount or check with the team that handles expenses.

Travel-expense claims

Travel expenses are claimed on the same **Submit Expense** form as any other expense – you pick a distance-based expense type, enter how far you travelled, and Open Core HR works out the amount from the mileage rate that applies to you. Open the form from **Self-Service > Expenses > Submit Expense**.

1. **Expenses** – Open the **Expenses** group in the menu.
2. **Submit Expense** – Then choose **Submit Expense**.
3. **Expense Type** – Choose a travel expense type – the form switches to a distance-based calculation.

Steps

1. Go to **Self-Service > Expenses > Submit Expense**.
2. Set the **Expense Date** to the day you travelled.
3. On an expense item, pick a distance-based **Expense Type** – these are labelled **(Auto)** in the list.
4. A **Distance** box appears, labelled with your organization's distance unit. Enter how far you travelled.
5. Instead of an amount box, the item shows the amount being **calculated** from that distance. Once it's ready you'll see:
 - The estimated **Amount**.
 - Underneath, the distance and the rate used – for example, "12.50 km × 6.00/km" in your organization's currency and unit.
6. Optionally add **Notes** and a **Receipt** for the item.
7. Add any other items, then click **Submit Expense**.

What you'll see

- Until you enter a distance, the amount reads **Enter a distance to price this claim**.
- While the amount is being worked out, the item shows **Calculating....**
- If you aren't eligible for that travel type, an error message appears on the item and the amount stays at zero. Pick a different expense type, or check with HR.
- If the amount comes out as zero, the mileage rate for your designation hasn't been set yet – ask HR to set it under **Expense Policies**.
- Only one travel (distance-based) expense is allowed per day. If you've already claimed one for that date, submitting another is blocked.

Tips

- The distance you enter is what the claim is priced on, so record it accurately – approvers can see it on the submitted claim.
- The distance unit and currency come from your organization's **Localisation** settings, so they match the rest of Open Core HR.

Requires Expenses module

Your expenses

The **My Expenses** screen lists every expense claim you've submitted, with its status. Open it from **Self-Service > Expenses > My Expenses**.

1. **Expenses** - Open the **Expenses** group in the menu.
2. **My Expenses** - Then choose **My Expenses**.

What you'll see

Cards at the top summarise your claims:

- **Total Claims**
- **Pending**
- **Approved**
- **Rejected**
- **Total Amount**

If your organisation has expense guidelines or applicable policies, they appear in an **Expense Guidelines & Policies** panel.

The table has these columns:

- **Date**
- **Type** - the expense types in the claim
- **Amount** - total claimed
- **Items** - how many items the claim has
- **Approved** - approved amount, once decided
- **Status** - **Pending**, **Approved**, **Rejected**, **Processed**, or **Cancelled**
- **Actions**

Steps

Filter the list

1. Use the **Status** dropdown above the table.
2. Use the **From Date** and **To Date** pickers to limit by date.
3. Type in the **Search expenses...** box to search the table.
4. Click **Clear** to reset the filters.

Open or cancel a claim

- Click the view (eye) button in the **Actions** column to see a claim's full details. See [Viewing an expense](#).
- For a **Pending** claim, a cancel button also appears. See [Cancelling an expense](#).

Submit a new claim

Use the **Submit Expense** button at the top right. See [Submitting an expense](#).

Requires Expenses module

Viewing an expense

You can open any expense claim to see its full details, each item, and the approval decision.

1. **Expenses** - Open the **Expenses** group in the menu.
2. **My Expenses** - Then choose **My Expenses**.
3. **View** - Click the eye icon on the claim you want to inspect.

Steps

1. Go to **Self-Service > Expenses > My Expenses**.
2. Find the claim in the table and click the view (eye) button in the **Actions** column.
3. The **Expense Details** panel slides in from the right.

What you'll see

The panel shows:

- **Date** and **Status**
- **Total Amount**, and **Approved Amount** once it's been decided
- **Notes** you added to the claim, and **Approval Notes** if the approver left any
- **Approved By** (with the date) or **Rejected By** (with the date)

Under **Items**, each item in the claim is listed with:

- The expense type and its code
- **Amount**, and **Approved** amount if decided
- **Distance**, for travel items
- Your notes and any admin notes
- A **View Receipt** link if you attached one

Requires Expenses module

Cancelling an expense

You can cancel an expense claim while it's still **Pending**. Once it's approved, rejected, or processed, it can't be cancelled.

1. **Expenses** - Open the **Expenses** group in the menu.
2. **My Expenses** - Then choose **My Expenses**.
3. **Cancel** - On a pending claim, click the red **Cancel** icon (rightmost action on the row).
4. **Yes, Cancel** - Confirm - the claim is cancelled and disappears from the pending list.

Steps

1. Go to **Self-Service > Expenses > My Expenses**.
2. Find the **Pending** claim and click the cancel button in the **Actions** column.
3. In the **Cancel Expense** confirmation, click **Yes, Cancel** to confirm, or **No, Keep It** to back out.
4. A confirmation appears and the claim's status changes to **Cancelled**.

Troubleshooting

- **"Expense request not found or cannot be cancelled."** - The claim is no longer pending, so it can't be cancelled here. Contact the team that handles expenses if you need to change a claim that's already being processed.
- If a claim has no cancel button, it isn't in a state that you can cancel yourself.

Requires Task module

Your tasks

The **Tasks** screen (under **Self-Service** in the left menu) is where you track work assigned to you, work you have assigned to others, and any recurring task occurrences.

1. **Tasks** - Open **Tasks** from the menu.

What you'll see

At the top, four summary cards show counts for **Total Tasks**, **In Progress**, **Completed**, and **Overdue**.

Below the cards are three tabs:

- **My Tasks** - tasks assigned to you.
- **Assigned by Me** - tasks you created and assigned to other people.
- **Recurring Instances** - individual occurrences of repeating tasks (shows a red badge with the overdue count when any are overdue).

My Tasks and Assigned by Me columns

Both lists show these columns:

- **Task** - the task name. An **Overdue** badge appears when the due date has passed, and a small repeat icon appears for recurring tasks.
- **Assigned By** (on **My Tasks**) or **Assigned To** (on **Assigned by Me**) - the person's name.
- **Due Date** - the due date, plus the time if one was set.
- **Priority** - **Low**, **Medium**, or **High**.
- **Status** - **New**, **In Progress**, **Completed**, **Hold**, or **Cancelled**.
- **Actions** - buttons for viewing and, on your own tasks, working the task.

Recurring Instances columns

- **Task** - the name of the parent task.
- **Scheduled Date** - the date this occurrence is due.
- **Status** - **Pending**, **Overdue**, **Completed**, or **Skipped**.
- **Actions** - a button to view the occurrence details.

Steps

1. Open **Tasks** from the **Self-Service** menu.
2. Choose the **My Tasks**, **Assigned by Me**, or **Recurring Instances** tab.
3. On **My Tasks** and **Assigned by Me**, use the **Status**, **Priority**, **From Date**, and **To Date** filters to narrow the list, or type in the search box.
4. On **Recurring Instances**, use the **Filter by Status** dropdown (**All Active**, **Overdue**, **Today**, **Upcoming**).
5. Click the eye icon in the **Actions** column to open a task and see its details.

Tips

- See [Working a task](#) for the Start, Hold, Resume, and Complete actions.
- See [Recurring task occurrences](#) for handling individual occurrences of a repeating task.

Requires Task module

Creating a task

You can create a task and assign it to another person from the **Tasks** screen. The task you create appears under the **Assigned by Me** tab.

1. **Tasks** - Open **Tasks** from the menu.
2. **Create Task** - Click **Create Task** at the top right of the page.
3. **Task Name** - Give the task a short, clear name.
4. **Assign To** - Pick the person to assign the task to.
5. **Priority** - Low, medium, high - the assignee sees this in their list.
6. **Due Date** - When the task is due.
7. **Create Task** - Save the task - the assignee sees it in their My Tasks list.

Steps

1. Open **Tasks** from the **Self-Service** menu.
2. Click **Create Task**. A panel titled **Create New Task** slides in from the right.
3. Fill in the fields:
 - o **Task Name** (required) - a short name for the task.
 - o **Assign To** (required) - search for and select the person to assign the task to. You cannot assign a task to yourself.
 - o **Priority** (required) - **Low**, **Medium**, or **High** (defaults to **Medium**).
 - o **Due Date** (required) - when the task is due. Must be today or later.
 - o **Due Time** - an optional time of day.
 - o **Recurring** - **Never**, **Daily**, **Weekly**, or **Monthly**. Choose anything other than **Never** to make the task repeat.
 - o **Recurring End Date** (required when recurring) - the last date the task should repeat.
 - o **Requires attachment before completion** - turn this on if the assignee must upload a document before they can mark the task complete.
 - o **Notes / Description** - optional notes for the assignee.
 - o **Voice Description** - an optional audio file (MP3, WAV, M4A, or AAC, up to 10 MB).
4. Click **Create Task**.

What you'll see

A confirmation appears and the new task shows up under the **Assigned by Me** tab. If you set the task to recur, the individual occurrences are created automatically.

Tips

- To cancel without creating the task, click **Cancel** or close the panel.
- The assignee tracks the task from their **My Tasks** tab - see [Your tasks](#).

Requires Task module

A task's details and activity

Opening a task shows everything about it in a panel that slides in from the right, including a timeline of activity.

1. **Tasks** - Open **Tasks** from the menu.
2. **My Tasks** - Find the task on the **My Tasks** or **Assigned by Me** tab.
3. **Task Details** - Click the eye icon in the **Actions** column. The **Task Details** panel opens.

Steps

1. Open **Tasks** from the **Self-Service** menu.
2. Find the task on the **My Tasks** or **Assigned by Me** tab.
3. Click the eye icon in the **Actions** column. The **Task Details** panel opens.

What you'll see

The panel shows:

- **Status** - **New**, **In Progress**, **Completed**, or **Hold**.
- **Priority** - **Low**, **Medium**, or **High**.
- **Due Date** - the due date, plus the time if one was set.
- **Assigned To** - the person the task is assigned to.
- **Created By** - the person who created the task.
- **Notes** - any notes added when the task was created.
- **Recurring** - the repeat pattern and end date, for repeating tasks.
- **Activity Timeline** - a dated list of everything that has happened on the task: started, put on hold, resumed, completed, and any comments or files added. Each entry shows who did it and when, and a **View Attachment** link if a file was attached.

If the task is one of yours and is in progress, you'll also see sections to add an update and, when required, upload a document. See [Adding a task update](#) and [Working a task](#).

Tips

- Click **Close** to dismiss the panel.

Requires Task module

Working a task

As a task moves from new to done you change its status using the **Start**, **Hold**, **Resume**, and **Complete** actions. These are available only for tasks assigned to you.

1. **Tasks** - Open **Tasks** from the menu.

How the statuses flow

- **New** - the task has been assigned but not started. Use **Start Task** to begin.
- **In Progress** - you are working on the task. From here you can **Hold** it or **Complete** it.
- **Hold** - the task is paused. Use **Resume Task** to pick it back up.
- **Completed** - the task is done.

Note

You can only have one task **In Progress** at a time. If you try to start or resume a task while another is in progress, you'll be asked to complete or hold the other one first.

Steps

1. Open **Tasks** from the **Self-Service** menu and go to the **My Tasks** tab.
2. Use the buttons in the **Actions** column, or open the task with the eye icon and use the buttons at the bottom of the **Task Details** panel:
 - **Start Task** - available when the task is **New**.
 - **Hold** - available when the task is **In Progress**. The task moves to **Hold**.
 - **Complete** - available when the task is **In Progress**.
 - **Resume Task** - available when the task is **Hold**. The task moves back to **In Progress**.
3. When using the action buttons in the table, confirm the action in the dialog that appears.

Completing a task that requires an attachment

If the task was set up to require an attachment, clicking **Complete** opens a **Complete Task** dialog:

1. Choose a file under **Attachment** (required).
2. Optionally add **Notes**.
3. Click **Complete Task**.

You can also upload the required document ahead of time from the **Upload Required Document** section inside the **Task Details** panel while the task is in progress.

Troubleshooting

- **The Complete button asks for an attachment** - the task requires a document. Attach one in the **Complete Task** dialog or upload it first from the task details panel.
- **You can't start a task** - check whether you already have another task in progress and finish or hold it.

Requires Task module

Adding a task update

While a task is in progress you can post updates - a written comment, a file, or both. Updates appear in the task's activity timeline so everyone involved can follow progress.

1. **Tasks** - Open **Tasks** from the menu.
2. **View Details** - On **My Tasks**, click the eye icon next to a task that is **In Progress**.
3. **Add Update** - Scroll to the **Add Update** section inside the Task Details panel.
4. **Comment** - Type your update in the box.
5. **Attach** - And/or choose a file to attach.
6. **Send** - Click **Send** - your update is added to the **Activity Timeline**.

Steps

1. Open **Tasks** from the **Self-Service** menu and go to the **My Tasks** tab.
2. Click the eye icon next to a task that is **In Progress** to open the **Task Details** panel.
3. Scroll to the **Add Update** section.
4. Type your comment in the box, and/or choose a file to attach.
5. Click **Send**.

What you'll see

A confirmation appears and your update is added to the **Activity Timeline** in the same panel, showing the text, any attached file, your name, and the time.

Tips

- You need to enter a message, attach a file, or both - an empty update can't be sent.
- For required documents on tasks that need an attachment before completion, use the **Upload Required Document** section instead - see [Working a task](#).

Requires Task module

Recurring task occurrences

A task set to repeat daily, weekly, or monthly generates a separate occurrence for each scheduled date. These are listed on the **Recurring Instances** tab of the **Tasks** screen.

1. **Tasks** - Open **Tasks** from the menu.
2. **Recurring Instances** - Click the **Recurring Instances** tab.
3. **Filter by Status** - Use the **Filter by Status** dropdown - **All Active, Overdue, Today, Upcoming** - or the search box to narrow the list.
4. **View** - Click the eye icon in the **Actions** column to view the occurrence details.

What you'll see

The **Recurring Instances** tab shows:

- Three summary boxes: **Overdue, Today, and Upcoming**.
- A **Filter by Status** dropdown: **All Active, Overdue, Today, Upcoming**.
- A list with these columns:
 - **Task** - the name of the parent task.
 - **Scheduled Date** - the date this occurrence is due.
 - **Status** - **Pending, Overdue, Completed, or Skipped**.
 - **Actions** - a button to view the occurrence.

Steps

1. Open **Tasks** from the **Self-Service** menu.
2. Go to the **Recurring Instances** tab.
3. Use the **Filter by Status** dropdown or the search box to find an occurrence.
4. Click the eye icon in the **Actions** column to view the occurrence details, which show the scheduled date, status, priority, the parent task's notes, and who it's assigned to.

Note

When you mark the parent recurring task complete from the **My Tasks** tab, the current occurrence (today's, or the earliest pending one) is marked complete automatically.

Note

Opening a single occurrence shows a read-only details panel. There is no per-occurrence complete or skip button on this screen, even though the system supports both.

Requires Announcements module

Announcements

The announcements page shows company notices for everyone and for your location. Open **Announcements** in the Self-Service menu.

1. **Announcements** - Open **Announcements** from the menu.

What you'll see

Announcements appear as cards. Each card shows:

- The announcement **title**.
- The date it was posted.
- An **Expires Soon** marker if it ends within a few days, or an **Expired** marker if it has passed its end date.
- The text of the announcement. If it's long, the card shows the first part with a **Read more** link - see [Reading an announcement](#).
- An **Attachments** area with a **Download** button for each attached file, when there are any.
- A location tag, when the notice is for a specific location rather than everyone.

If there's more than one page of announcements, use **Previous** and **Next** at the bottom to move between pages.

When there's nothing to show, the page says **No Announcements**.

Tips

- The newest announcements appear first.
- You only see announcements meant for everyone or for your location.

Requires Announcements module

Reading an announcement

Most announcements show their full text right on the [Announcements](#) card. For longer ones, you can open the complete announcement in a pop-up window.

1. **Announcements** - Open **Announcements** from the menu.
2. **Read more** - On an announcement that has a **Read more** link, click it to open the full text.
3. **Close** - Click **Close** when you're done reading to return to the list.

Steps

1. Open **Announcements** in the Self-Service menu.
2. On an announcement that has a **Read more** link, click **Read more**.
3. The full announcement opens in a window showing:
 - The **title**.
 - **Posted on** - the date and time it was published.
 - **Expires** - the end date, if the announcement has one.
 - The complete text.
 - An **Attachments** list, when there are any - click a file name to open or download it.
4. Click **Close** when you're done.

Tips

- Shorter announcements don't have a **Read more** link - their full text is already on the card.
- You can also download attachments directly from the announcement card without opening the window.

Holidays

The holidays page shows the holiday list for the current year at your location. Open **Holidays** in the Self-Service menu.

1. **Holidays** - Open **Holidays** from the menu.

What you'll see

At the top, three summary tiles:

- **Total Holidays** - how many holidays there are this year.
- **Upcoming** - holidays still to come.
- **Past** - holidays that have already happened.

Below that, the holidays are grouped by month. Each month is a table with these columns:

- **Date** - the day and month.
- **Day** - the day of the week.
- **Holiday** - the holiday name, with a short note underneath if one was added.
- **Status** - **Today!** if it's today, **Past** if it has passed, **In N days** if it's coming up soon, or **Upcoming** otherwise.

Past holidays appear slightly faded so the upcoming ones stand out.

If no holidays have been set up for the year, the page says **No Holidays**.

Tips

- The list is for your location, so colleagues at other locations may see a different set.
- Use the **Upcoming** tile to see at a glance how many days off are still ahead this year.

Requires Documents module

Your documents

The **Documents** screen (under **Self-Service** in the left menu) lists the documents you've uploaded and lets you view or download them.

1. **Documents** - Open **Documents** from the menu.

What you'll see

A table with these columns:

- **Document Type** - the type the document was filed under (for example, a passport copy or visa).
- **File Name** - the name of the uploaded file.
- **Upload Date** - when it was uploaded.
- **Actions** - a download button and a view button.

If you haven't uploaded anything yet, the screen shows "No documents uploaded yet."

Steps

1. Open **Documents** from the **Self-Service** menu.
2. To save a copy, click the download icon in the **Actions** column.
3. To open the document in a new browser tab, click the view (eye) icon.

Tips

- To add a document, click **Upload Document** - see [Uploading a document](#).

Requires Documents module

Uploading a document

Use the **Documents** screen to upload a document and file it under a document type.

1. **Documents** - Open **Documents** from the menu.
2. **Upload Document** - Click **Upload Document** at the top right of the page.
3. **Document Type** - Pick the kind of document - only document types your company set up appear here.
4. **File** - Choose your file. Accepted: PDF, JPG, PNG. Max size: 5 MB.
5. **Upload** - Send the file. It appears in the list once it's done uploading.

Steps

1. Open **Documents** from the **Self-Service** menu.
2. Click **Upload Document**. The **Upload Document** dialog opens.
3. Choose a **Document Type** from the dropdown.
4. Under **File**, choose the file from your device. Accepted formats are PDF, JPG, and PNG, up to 5 MB.
5. Click **Upload**.

What you'll see

A confirmation appears and the document is added to your list on the **Documents** screen.

Note

If you upload a new file for a document type you already have on file, it replaces the previous one.

Troubleshooting

- **The upload is rejected** - check that the file is a PDF, JPG, or PNG and within the size limit, and that you selected a document type.

Requires Asset module

Your assets

The **My Assets** screen (under **Self-Service** in the left menu) lists the company assets currently assigned to you.

1. **My Assets** - Open **My Assets** from the menu.

What you'll see

A table with these columns:

- **Asset Name** - the name of the asset.
- **Category** - the asset's category.
- **Serial Number** - the serial number, if recorded.
- **Includes** - the count and names of any accessories that come with the asset.
- **Assigned Date** - the date the asset was assigned to you.
- **Actions** - a button to view full details.

Steps

1. Open **My Assets** from the **Self-Service** menu.
2. Use the search box to find an asset by name.
3. Click the eye icon in the **Actions** column to open the details panel, which shows the **Serial Number**, **Asset Tag**, **Brand**, **Model**, **Assigned Date**, **Condition When Assigned**, **Assignment Notes**, and a list of **Accessories**.

Tips

- The details panel also lists documents attached to the asset and its maintenance history - see [An asset's documents](#) and [An asset's maintenance history](#).

Requires Asset module

An asset's documents

Each asset assigned to you can have documents attached, such as a warranty card or handover form. You view them inside the asset's details panel.

1. **My Assets** - Open **My Assets** from the menu.
2. **View** - Click the **View** (eye) icon next to an asset to open its details.
3. **Documents** - Scroll to the **Documents** section to see anything attached to this asset - invoices, warranty certificates and other files.

Steps

1. Open **My Assets** from the **Self-Service** menu.
2. Click the eye icon next to the asset. The details panel slides in from the right.
3. Scroll to the **Documents** section.
4. For any document with a **View** link, click it to open the file in a new browser tab.

What you'll see

The **Documents** section lists each attached document with its file name, document type, the date it was added, and the file size. If nothing is attached, it shows "No documents attached to this asset."

Tips

- Documents here are managed by your IT or admin team - you can view them but not upload to an asset from this screen.

Requires Asset module

An asset's maintenance history

If an asset assigned to you has been serviced or repaired, those records appear in the asset's details panel.

1. **My Assets** - Open **My Assets** from the menu.
2. **View** - Click the **View** (eye) icon next to an asset to open its details.
3. **Maintenance Log** - Scroll to the **Maintenance Log** to see service and repair history for this asset.

Steps

1. Open **My Assets** from the **Self-Service** menu.
2. Click the eye icon next to the asset. The details panel slides in from the right.
3. Scroll to the **Maintenance Log** section.

What you'll see

The **Maintenance Log** lists each record with:

- The type of maintenance and the date it was performed.
- A description of the work.
- The vendor, the cost, and the next due date, where these were recorded.
- Any additional notes.

If there are no records, it shows "No maintenance recorded yet."

Tips

- Maintenance records are added by your IT or admin team; this screen is read-only.

Requires Loan module

Your loans

The **My Loans** screen (under **Self-Service** in the left menu) shows your loan applications and the loans you currently hold.

1. **My Loans** - Open **My Loans** from the menu.
2. **Apply for Loan** - Click **Apply for Loan** at the top right of the page.
3. **Amount** - How much you'd like to borrow.
4. **Tenure** - How many months you want to repay it over (1-60).
5. **Start Date** - When you'd like the loan to start.
6. **Purpose** - A short reason for the loan.
7. **Submit Application** - Send it for approval.

What you'll see

A table with these columns:

- **Loan Number** - the reference number for the loan.
- **Amount** - the loan amount.
- **Tenure** - the repayment period in months.
- **EMI** - the monthly instalment.
- **Outstanding** - the amount still to be repaid.
- **Status** - **Pending**, **Approved**, **Active**, **Completed**, **Rejected**, or **Cancelled**.
- **Start Date** - when the loan starts.
- **End Date** - when the loan ends, once known.
- **Actions** - a button to view the repayment schedule, and (for a **Pending** request) a button to cancel it.

Steps

1. Open **My Loans** from the **Self-Service** menu.
2. Use the search box to find a loan.
3. Click the eye icon in the **Actions** column to view the loan's details and repayment schedule - see [A loan's details](#).

Applying for a loan

1. On the **My Loans** screen, click **Apply for Loan**. A panel slides in from the right.
2. Enter the **Amount** and **Tenure (months)** (1-60). An estimated monthly EMI is shown.
3. Pick a **Start Date**.
4. Optionally add a **Purpose** and **Notes**.
5. Optionally add up to five **Security Deposits / Supporting Documents** entries. For each entry choose a **Type** (**Supporting Document**, **Blank Cheque**, **Post-Dated Cheque**, or **Other**); for cheque types, enter the **Cheque Number** and **Bank Name**. You can attach a file (PDF, JPG, or PNG) and add notes.
6. Click **Submit Application**. The request is sent for approval and appears in your list with status **Pending**.

Cancelling a pending request

1. In the **Actions** column of a **Pending** loan, click the cancel (X) icon.
2. Confirm in the dialog. The request is retracted and the approval workflow stops. You can submit a new request afterwards.

Requires Loan module

A loan's details

Open any loan to see its repayment schedule and a summary of what's left to pay.

1. **My Loans** - Open **My Loans** from the menu.

Steps

1. Open **My Loans** from the **Self-Service** menu.
2. Click the eye icon next to the loan. The **Repayment Schedule** panel slides in from the right.

What you'll see

At the top of the panel, a summary shows the **Amount**, **EMI**, **Outstanding**, and **Status**.

Below that, the **Schedule** section lists each instalment with:

- A number and the month it's due.
- The remaining outstanding amount after that instalment.
- The instalment amount.
- A status for that instalment (for example, completed, verified, overdue, or pending).

If no schedule is available yet, the panel shows "No schedule available."

Note

A security deposit recorded when you applied is not shown again in this panel - the panel covers the loan summary and the repayment schedule. Ask HR if you need to confirm a deposit.

Requires HRPolicies module

Your HR policies

The **HR Policies** screen (under **Self-Service** in the left menu) lists the policies assigned to you to read and acknowledge.

1. **HR Policies** - Open **HR Policies** from the menu.
2. **Search** - Type a few letters of the title to filter the list.
3. **Open** - Click the eye icon in the **Actions** column to read the policy and acknowledge it.

What you'll see

At the top, four summary cards show **Total**, **Pending**, **Acknowledged**, and **Overdue** counts.

Below the cards, a table with these columns:

- **Title** - the policy name.
- **Category** - the policy's category, shown as a coloured badge.
- **Effective Date** - the date the policy takes effect.
- **Status** - **Pending**, **Acknowledged**, **Overdue**, or **Expired**.
- **Actions** - a button to open the policy.

Steps

1. Open **HR Policies** from the **Self-Service** menu.
2. Use the search box to find a policy by title.
3. Click the eye icon in the **Actions** column to open the policy.

Tips

- See [Reading a policy](#) for what the policy screen contains, and [Acknowledging a policy](#) for how to confirm you've read it.

Requires HRPolicies module

Reading a policy

Opening a policy shows its full text along with its category, effective date, and whether it's mandatory.

1. **HR Policies** - Open **HR Policies** from the menu.

Steps

1. Open **HR Policies** from the **Self-Service** menu.
2. Click the eye icon next to the policy you want to read.
3. Read the policy content on the screen. Use **Back to Policies** at the top to return to the list.

What you'll see

- The policy **title** at the top, with badges showing the **category**, the **effective date**, and a **Mandatory** badge when the policy is mandatory.
- The full policy text, including any headings, lists, and tables it contains.
- A green banner if you've already acknowledged the policy, showing the date you acknowledged it and any comments you added.
- An **Acknowledge This Policy** section if your acknowledgment is still pending or overdue - see [Acknowledging a policy](#).

Requires HRPolicies module

Acknowledging a policy

When a policy is assigned to you, you're asked to confirm you've read it. You do this from the policy's own screen.

1. **HR Policies** - Open **HR Policies** from the menu.
2. **I Acknowledge This Policy** - When you are ready, select this button to confirm you have read the policy.

Steps

1. Open **HR Policies** from the **Self-Service** menu.
2. Click the eye icon next to a policy whose status is **Pending** or **Overdue**.
3. Read the policy text.
4. Scroll to the **Acknowledge This Policy** section. If a deadline applies, it's shown here, with an **Overdue** badge when the deadline has passed.
5. Optionally type a note in the **Comments** box.
6. Click **I Acknowledge This Policy**.

What you'll see

A confirmation appears and the screen reloads to show a green banner with the date you acknowledged the policy and any comments you added. The policy's status changes to **Acknowledged** in your list.

Tips

- Once acknowledged, the **Acknowledge This Policy** section no longer appears for that policy.
- A policy already showing as **Acknowledged** or **Expired** has no acknowledge button.

Requires DisciplinaryActions module

Your warnings

This page lists the warnings on your record so you can read them, download a copy, and acknowledge any that need a response. Open it from **Self-Service > My Warnings**.

1. **My Warnings** - Open **My Warnings** from the menu.

What you'll see

At the top, four summary cards: **Total Warnings**, **Active**, **Pending Acknowledgment**, and **Appealed**.

Below that, a table of your warnings with these columns:

- **Warning No.** - the reference number for the warning.
- **Type** - the warning type.
- **Severity** - shown as a tag (for example, verbal, written, or final).
- **Subject** - a short title for the warning.
- **Issue Date** - when the warning was issued.
- **Status** - for example, Issued, Acknowledged, Appealed, Revoked, or Expired.
- **Actions** - buttons to view, download, or acknowledge.

Drafts and warnings still going through approval are not shown here.

Steps

1. Go to **Self-Service > My Warnings**.
2. Use the **Status**, **From Date**, and **To Date** filters, or the **Search warnings...** box, to narrow the list.
3. On any row, use the actions:
 - The view icon opens [the warning's details](#).
 - The document icon downloads the warning letter.
 - The check icon (shown only when a warning is **Issued** and needs a response) opens the **Acknowledge Warning** window - see [Acknowledging a warning](#).
4. Use **View My Appeals** to switch to [your appeals](#).

Tips

- A warning only shows the acknowledge action while its status is **Issued** and it requires acknowledgment.

Requires DisciplinaryActions module

A warning's details

This page shows the full details of a single warning, plus any appeals raised against it. Open it from [your warnings](#) by selecting the view icon on a row.

1. **My Warnings** - Open **My Warnings** from the menu.
2. **View** - Click the **view** icon in the **Actions** column to open the warning.
3. **Download Letter** - Opens the warning letter document.
4. **Appeal** - While the warning is **Issued**, you can acknowledge it (from the **My Warnings** list) or **Appeal** to contest it.

What you'll see

- A header with the **Subject**, the warning number, and the current **Status** tag.
- **Download Letter** - opens the warning letter document.
- **Acknowledge** - shown only when the warning is **Issued** and needs a response.
- **Appeal** - shown only while the warning is **Issued**; opens the [appeal form](#).
- **Warning Information** - Type, Severity (if set), Issue Date, and who issued it. If you've already acknowledged it, the acknowledged date and your comments appear here too.
- **Description** - the details of the warning, if any were recorded.
- **Appeals** - a list of appeals raised against this warning, each with its number, date, status, and a **View** link to [the appeal's details](#).

Steps

1. Open **My Warnings** from the menu.
2. Click the **view** icon on the warning you want.
3. Read the warning information and description.
4. Use **Download Letter** if you want a copy.
5. If the warning is **Issued**, decide whether to [acknowledge it](#) or [raise an appeal](#).

Tips

- Acknowledging a warning closes off the option to appeal it, so review it carefully before choosing.

Requires DisciplinaryActions module

Acknowledging a warning

Acknowledging a warning confirms that you have read and understood it. You can do this from [your warnings](#) list or from [the warning's details](#).

1. **My Warnings** - Open **My Warnings** from the menu.
2. **Acknowledge** - Click the check icon on the warning row to start the acknowledgment.
3. **Comments** - (Optional) Add a short comment for HR.
4. **Acknowledge** - Confirm - the warning is then marked as acknowledged.

Steps

1. Open **Self-Service** > **My Warnings**, or open a warning's details page.
2. Select the acknowledge action - the check icon on a row, or the **Acknowledge** button on the details page. It only appears when the warning's status is **Issued** and it requires acknowledgment.
3. In the **Acknowledge Warning** window, optionally type a note in the **Comments (Optional)** box.
4. Select **Acknowledge**.

What you'll see

After acknowledging, the warning's status changes to **Acknowledged**, and the acknowledged date and your comments appear on the warning's details page.

Tips

- Acknowledging a warning means you can no longer appeal it. If you want to contest the warning, [raise an appeal](#) instead - both options are available while the warning is **Issued**.

Requires DisciplinaryActions module

Your appeals

This page lists the appeals you've raised against warnings, with their status and outcome. Open it from **Self-Service > My Appeals**.

1. **My Appeals** - Open **My Appeals** from the menu.
2. **Search** - Type to filter the appeals list - also filter by **Status** and **From/To Date** above the table.
3. **View** - Open the appeal's details.
4. **Withdraw** - Withdraw the appeal - only available while it's **Pending** or **Under Review**.
5. **View My Warnings** - Switch over to your warnings to start a new appeal.

What you'll see

At the top, five summary cards: **Total Appeals**, **Pending**, **Under Review**, **Approved**, and **Rejected**.

Below that, a table of your appeals with these columns:

- **Appeal No.** - the reference number for the appeal.
- **Warning No.** - the warning the appeal relates to.
- **Warning Type** - the type of that warning.
- **Submitted** - when you submitted the appeal.
- **Status** - for example, Pending, Under Review, Approved, Rejected, or Withdrawn.
- **Outcome** - once decided, for example Warning Upheld, Warning Reduced, or Warning Revoked. Shows a dash until then.
- **Actions** - buttons to view details or withdraw.

Steps

1. Go to **Self-Service > My Appeals**.
2. Use the **Status**, **From Date**, and **To Date** filters, or the **Search appeals...** box, to narrow the list.
3. On any row, use the actions:
 - The view icon opens [the appeal's details](#).
 - The X icon (shown only while the appeal is **Pending** or **Under Review**) starts a withdrawal - see [Withdrawing an appeal](#).
4. Use **View My Warnings** to switch to [your warnings](#).

Tips

- To raise a new appeal, open the warning you want to contest and use its **Appeal** button - see [Raising an appeal against a warning](#).

Requires `DisciplinaryActions` module

Raising an appeal against a warning

If you disagree with a warning, you can submit an appeal for HR to review. You start an appeal from the warning itself.

1. **My Warnings** - Open **My Warnings** from the menu.
2. **Appeal** - Click **Appeal** on the warning detail screen to open the appeal form.
3. **Reason for Appeal** - A short summary of why you're appealing.
4. **Your Statement** - Your detailed account of what happened.
5. **Submit Appeal** - Send the appeal - HR will review it.

Steps

1. Open [the warning's details](#) from **Self-Service > My Warnings**.
2. Select **Appeal**. (This is available while the warning is **Issued** and the appeal deadline hasn't passed.)
3. On the **Submit Appeal** page, review the **Warning Summary** - it shows the warning number, type, reason, and the **Appeal Deadline**.
4. Fill in the appeal form:
 - o **Reason for Appeal** (required) - a brief description of why you're appealing.
 - o **Your Statement** (required) - your detailed statement and any relevant context.
 - o **Supporting Documents (Optional, max 5 files)** - use **Upload Files** to attach evidence. Accepted file types are PDF, JPG, JPEG, PNG, DOC, and DOCX. Use **Remove** next to a file to take it off.
5. Select **Submit Appeal**. To stop without submitting, select **Cancel**.

What you'll see

After you submit, the appeal is created with status **Pending**, the warning's status changes to **Appealed**, and you're taken to [the appeal's details](#).

Tips

- You can have only one active appeal per warning.
- If the deadline to appeal has already passed, or an appeal is already in progress, you'll be sent back to the warning with a message explaining why.
- Acknowledging a warning ends the option to appeal it, so don't acknowledge a warning you intend to contest.

Requires DisciplinaryActions module

An appeal's details

This page shows everything about a single appeal - what you submitted, its current status, and HR's decision once it's reviewed. Open it from [your appeals](#) by selecting the view icon on a row, or from the linked appeal on a warning's details page.

1. **My Appeals** - Open **My Appeals** from the menu.

What you'll see

- A header with the appeal number and the current **Status** tag (Pending, Under Review, Approved, Rejected, or Withdrawn).
- **Withdraw** - shown only while the appeal is **Pending** or **Under Review**.
- **Overview** - Status, Outcome (once decided - Warning Upheld, Warning Reduced, or Warning Revoked), the date you submitted, the date it was reviewed, a link to the related **Warning**, who reviewed it, and, if the warning was reduced, the new warning type under **Reduced To**.
- **Appeal Reason** - the reason you entered.
- **Employee Statement** - the statement you entered.
- **Supporting Documents** - any files you attached, each with a download button.
- **Review Notes** - notes from HR, shown once the appeal has been reviewed.

Steps

1. Open [your appeals](#) and select the view icon on the appeal you want.
2. Review the overview, your submitted text, and any review notes.
3. If the appeal is still **Pending** or **Under Review** and you no longer want to pursue it, use **Withdraw** - see [Withdrawing an appeal](#).

Requires DisciplinaryActions module

Withdrawing an appeal

You can withdraw an appeal you've raised, as long as HR hasn't finished reviewing it. Do this from [your appeals](#) list or from [the appeal's details](#).

1. **My Appeals** - Open **My Appeals** from the menu.
2. **Withdraw** - On a row whose status is **Pending** or **Under Review**, click the X icon to start the withdrawal.
3. **Withdraw Appeal** - Confirm - the appeal is moved to **Withdrawn**.

Steps

1. Open **Self-Service** > **My Appeals**, or open an appeal's details page.
2. Select the withdraw action - the X icon on a row, or the **Withdraw** button on the details page. It's only available while the appeal's status is **Pending** or **Under Review**.
3. In the **Withdraw Appeal** confirmation window, select **Withdraw Appeal**. To keep the appeal, select **Cancel**.

What you'll see

The appeal's status changes to **Withdrawn**. The related warning goes back to the status it had before you appealed, and any supporting documents you attached are removed.

Tips

- Withdrawing an appeal can't be undone. If you still want to contest the warning afterward, you'd need to raise a new appeal - and only if the warning is still appealable.

Your bank details

This page is where you record the bank account used for your salary. Open it from **Self-Service > Bank Details**.

Availability

This area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR team.

What you'll see

If you've already added an account, a **Bank Account** card shows your **Bank Name**, **Branch**, **Account Number** (most digits hidden, only the last few shown), and your bank identifiers, with an **Edit** button.

If you haven't added one yet, you'll see a message that no bank details were found and an **Add Bank Details** button.

Steps

1. Go to **Self-Service > Bank Details**.
2. Select **Add Bank Details** (or **Edit** if you've added an account before).
3. Fill in **Bank Name**, **Branch** and **Account Number**, then whichever identifiers your bank uses - **Bank Code**, **IBAN** or **SWIFT / BIC**.
4. Select **Save Bank Details**. To leave without saving, select **Cancel**.

Tips

- For your security, your account number is shown partly hidden once saved - only the last few digits stay visible.
- Updating these details replaces what was there before. Make sure the new details are correct so your salary isn't delayed.

Requires EmployeeLifecycle module

▼ Roles & permissions

view my promotions. Availability depends on your company's configuration.

Your promotions

This page shows the promotions you've received over time. Open it from **Self-Service > My Promotions**.

Availability

This area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR team.

What you'll see

A card for each promotion, showing:

- The effective date and a type tag - for example, **Salary Increment**, **Designation Change**, or **Both**.
- **Previous** and **New** designation, when the designation changed.
- **Previous Salary** and **New Salary**, when the salary changed.
- An increment percentage tag, when one applies.

If you have no promotions yet, you'll see a "No Promotions Yet" message.

Steps

1. Go to **Self-Service > My Promotions**.
2. Review each promotion card.

Requires EmployeeLifecycle module

▼ Roles & permissions

view my probations. Availability depends on your company's configuration.

Your probation

This page shows your probation reviews and confirmation status. Open it from **Self-Service > My Probation**.

Availability

This area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR team.

What you'll see

A **Probation Review** card for each record, with a status tag (for example, Pending, In Review, Confirmed, Extended, or Terminated) and these details:

- **Original End Date** - when your probation was originally due to end.
- **Extended End Date** - the new end date, if your probation was extended.
- **Extension Reason** - why it was extended, if applicable.
- **Confirmed On** - the date you were confirmed, once that's happened.
- **Notes** - any notes added by HR.

If you have no probation records, you'll see a message saying so.

Steps

1. Go to **Self-Service > My Probation**.
2. Review each probation review card.

Requires EmployeeLifecycle module

▼ Roles & permissions

view my bonuses. Availability depends on your company's configuration.

Your bonuses

This page shows your bonus history and payouts. Open it from **Self-Service > My Bonuses**.

Availability

This area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR team.

What you'll see

- A **Total Earned** card at the top, summing the bonuses that have been paid, with a note of how many paid bonuses that covers.
- A card for each bonus, showing the bonus cycle name, a status tag (for example, Pending, Approved, Paid, Cancelled, or Rejected), and these details:
 - **Percentage** - the bonus percentage.
 - **Base Salary** - the salary the bonus was calculated on.
 - **Amount** - the bonus amount.
 - **Paid On** - the date it was paid, once that's happened.
 - **Reason** - any reason recorded by HR.

If you have no bonus records, you'll see a message saying so.

Steps

1. Go to **Self-Service > My Bonuses**.
2. Review your total earned and each bonus card.

Requires EmployeeLifecycle module

▼ Roles & permissions

view my separations. Availability depends on your company's configuration.

Your separations

This page is where you start a resignation and track its progress. Open it from **Self-Service > My Separations**.

Availability

This area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR team.

What you'll see

- An **Initiate Resignation** button at the top (shown when you don't already have an active separation in progress).
- A card for each separation request, showing its type, a status tag (for example, Initiated, Pending Approval, In Progress, Approved, Completed, Cancelled, or Rejected), and these details:
 - **Resignation Date** - the date you submitted.
 - **Last Working Day** - your proposed last day.
 - **Reason** - the reason you gave.

If you have no separation records, you'll see a message saying so.

Steps

1. Go to **Self-Service > My Separations**.
2. To start a resignation, select **Initiate Resignation** - see [Initiating your separation](#).
3. To check progress, review the card for your request and its status tag.

Requires EmployeeLifecycle module

▼ Roles & permissions

initiate my separation. Availability depends on your company's configuration.

Initiating your separation

This page covers submitting your resignation for HR to review and approve. You reach it from [your separations](#).

Availability

This area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR team.

Steps

1. Go to **Self-Service > My Separations**.
2. Select **Initiate Resignation**.
3. On the **Initiate Resignation** page, fill in the **Resignation Details**:
 - **Resignation Date** (required) - the date of your resignation.
 - **Last Working Date** (required) - your proposed last working day.
 - **Reason for Resignation** (required) - the reason for your decision.
 - **Additional Notes** - any extra context (optional).
4. Select **Submit Resignation**. To leave without submitting, select **Cancel**.

What you'll see

After you submit, you're taken back to [your separations](#), where your request appears with its current status. HR will then review and process it.

Tips

- If you already have a separation request in progress, the **Initiate Resignation** button won't appear - you can only have one active request at a time.

Requires EmployeeLifecycle module

▼ Roles & permissions

view my settlements. Availability depends on your company's configuration.

Your final settlement

This page shows the breakdown of your full and final settlement when you're leaving. Open it from **Self-Service > My Settlement**.

Availability

This area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR team.

What you'll see

If a settlement has been prepared for you, a **Settlement Summary** card shows a status tag (for example, Pending, Calculated, Approved, Paid, or Cancelled) and these sections:

- **Due Date** and **Paid On** dates.
- **Earnings** - Pending Salary, Leave Encashment, Bonus, and Other Additions.
- **Deductions** - Loan Deduction and Other Deductions.
- **Net Settlement** - the final amount payable.
- **Notes** - any notes from HR.

If no settlement record exists yet, you'll see a message saying so.

Steps

1. Go to **Self-Service > My Settlement**.
2. Review the earnings, deductions, and net settlement amount.

Requires EmployeeLifecycle module

▼ Roles & permissions

view my letters. Availability depends on your company's configuration.

Your letters

This page collects your official documents and letters - for example, offer, appointment, and warning letters - so you can view and download them. Open it from **Self-Service > My Letters**.

Availability

This area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR team.

What you'll see

- A type filter at the top - **All Letters**, plus an entry for each kind of letter you have.
- A card for each letter, showing its title, its date, and a **Download** button.

If no letters are available, you'll see a message saying so.

Steps

1. Go to **Self-Service > My Letters**.
2. Optionally pick a letter type from the filter to narrow the list.
3. Select **Download** on a letter to open or save it.

Requires EmployeeLifecycle module

▼ Roles & permissions

view my warning letters. Availability depends on your company's configuration.

Your performance warnings

This page lists the performance warning letters issued to you. Open it from **Self-Service > Performance Warnings**.

Availability

This area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR team.

What you'll see

A card for each performance warning letter, showing:

- The reason (or "Performance Warning" if no reason was set).
- A status tag - for example, **Pending Approval**, **Issued - Awaiting Acknowledgement**, **Acknowledged**, or **Rejected**.
- The date it was issued, and who issued it.

If you haven't received any, you'll see a "No Performance Warnings" message.

Steps

1. Go to **Self-Service > Performance Warnings**.
2. Select a card to open [the performance warning's details](#), where you can read it, download it, and acknowledge it.

Tips

- These performance warning letters are separate from the disciplinary warnings under **Self-Service > My Warnings**.

Requires EmployeeLifecycle module

▼ Roles & permissions

view my warning letters. Availability depends on your company's configuration.

A performance warning's details

This page shows the full details of a single performance warning letter and lets you download it and acknowledge it. Open it from [your performance warnings](#) by selecting a card.

Availability

This area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR team.

What you'll see

- A status banner: either "Acknowledged on ..." with the date, or the current status (for example, **Issued - Awaiting Acknowledgement**).
- The reason and a status tag.
- A details block: **Warning date**, **Issued by**, and - when set - **Target amount** and **Grace period ends**.
- **Consequences** - what happens if things don't improve, if recorded.
- **Notes** - any notes from HR.
- **Download PDF** - opens the letter, if a copy is available.
- **Acknowledge** - shown only when the letter is issued and you haven't acknowledged it yet.

Steps

1. Open [your performance warnings](#) and select the letter you want.
2. Read the details, consequences, and notes.
3. Use **Download PDF** if you want a copy.
4. To acknowledge, select **Acknowledge**, then confirm in the prompt that you've read the letter.

What you'll see after acknowledging

The status changes to **Acknowledged** and the banner shows the date you acknowledged it.

Chat

Chat is the built-in messaging area in Open Core HR. You can send direct messages to a colleague, create group chats, share files and images, and react to messages.

Availability

This area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

What you'll see

The Chat screen has two parts:

- **The conversation list** runs down the left. It shows each chat you're part of - name, the last message, when it was last active, and an unread badge if there are new messages. There's a **New Chat** button at the top and a **Search chats...** box to filter the list. You can collapse this list to icons only.
- **The open conversation** fills the rest of the screen. At the top is the chat name (and member count for groups), with the **Info** button for group details. Messages appear in the middle, and the message box ("Type a message...") is at the bottom. When you first open Chat, this area says "Select a conversation to start chatting."

Steps

1. Open **Chat** from your menu.
2. In the conversation list on the left, select a chat to open it, or use **Search chats...** to find one.
3. Type in the message box at the bottom and press Enter to send.

To start a new conversation or a group, see [Conversations and groups](#).

Conversations and groups

Start a one-to-one chat with a colleague, or create a group chat for a team or project. You can add more people to a group later from the group info panel.

Availability

This area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Starting a one-to-one chat

1. In Chat, select **New Chat**.
2. On the **Direct Message** tab, type a name in **Search employees...** and pick the person.
3. In the **Message** box, type your first message.
4. Select **Send Message**. The conversation opens.

Creating a group

1. In Chat, select **New Chat**.
2. Switch to the **Group Chat** tab.
3. In **Group Name**, type a name for the group.
4. Use **Search employees to add...** to find people, and select each one to add them. Selected members appear as chips above the search box - select the small x on a chip to remove someone.
5. Select **Create Group**. The button shows how many members you've added.

Adding people to a group

1. Open the group chat.
2. Select the **Info** button at the top of the conversation to open the group info panel. It shows the group name and the list of members.
3. Select **Add**, search for the person in **Search employees...**, and select them. They're added to the group.

What you'll see

The group info panel lists every member with their name and job title, and the total member count. Open it any time from the **Info** button.

Messages, reactions and files

Send text messages, react with an emoji, share files and images, and forward a message to another chat.

Availability

This area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Sending a message

1. Open the conversation.
2. Type in the message box at the bottom ("Type a message...").
3. Press Enter to send. To start a new line instead of sending, press Shift+Enter.

A tick appears next to your sent message; it changes once the other person has read it. You'll also see a "is typing" indicator when someone in the chat is typing.

Reacting to a message

1. Hover over the message.
2. Select the menu button (the three dots) that appears next to it.
3. Pick an emoji from the row at the top of the menu. Your reaction appears under the message; pick a different emoji to change it.

Sharing a file or image

1. Select the paperclip button to the left of the message box.
2. Choose **Image**, **Video**, or **File**, then pick the file from your device.
3. The file uploads and is sent to the chat. You can also drag a file onto the message area, or paste an image you've copied.

To view an image someone sent, select it - it opens full size, with a button to download it. Press Escape or select the x to close it. Other file types show as a card you can select to download.

Forwarding a message

1. Hover over the message and select its menu button (the three dots).
2. Choose **Forward**.
3. In **Search chats...**, find the chat you want to send it to and select it. The message is forwarded.

Other actions

- **Copy** - on a text message, the menu has a **Copy** option to copy its text.
- **Delete** - on your own messages, the menu has **Delete**. You're asked to confirm; deletion can't be undone.

Requires Calls module

Calls

The web version of Open Core HR Chat does not have audio or video calling - there are no call buttons in a conversation. Use Chat on the web for messaging, files, and reactions.

Availability

This area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

HR & Admin Guide

This guide is for HR staff, managers, and administrators who run the workspace side of Open Core HR: the screens where you manage people, attendance, leave, approvals, and company settings. If you only use Open Core HR for your own self-service tasks, see the Self-Service guide instead.

Finding your way around

Screens are grouped in the left **menu** under headings:

- **Dashboard** - at-a-glance overviews and the compliance dashboard.
- **Human Resources** - Employees, Attendance, and Leave Management.
- **Workforce Management** - Approvals, Asset Management, Loan Management, Disciplinary Actions, and HR Policies.
- **Operations** - Expenses and Announcements.
- **Settings** - Company Details, Organization Hierarchy, Master Data, Roles & Permissions, Audit Logs, and (for super admins) Organization Apps, External API Clients, and Microsoft 365.

What this guide covers

- **Employees** - the employee directory, adding people, status changes, and the employee profile.
- **Attendance & tracking** - attendance records, sessions, corrections, and analytics.
- **Leave & time off** - leave requests, compensatory offs, leave types, and balance management.
- **Approvals** - the approval inbox and workflows.
- **Disciplinary actions** - warnings and related records.
- **HR policies** - policies, categories, assignments, and acknowledgments.
- **Employee lifecycle** - offers, appointments, probations, and related letters.
- **Assets** - asset records, categories, and assignments.
- **Loans** - loans, repayments, security deposits, and loan reports.
- **Operations** - expense claims and announcements.
- **Organization & master data** - company details, the org hierarchy, departments, designations, locations, shifts, holidays, expense types and policies, and document types.
- **System administration** - roles and permissions, audit logs, and organization apps.
- **Microsoft 365** - the connection between Open Core HR accounts and Microsoft 365 mailboxes.

Note

You only see the menu items your role gives you access to. If a screen described in this guide isn't in your menu, you don't have permission for it - ask an administrator.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Your dashboard

The dashboard is the first screen you see when you sign in to Open Core HR. It greets you by name and gives you a quick read on what is happening across the workforce today. The exact cards and charts you see depend on which areas you have access to.

1. **Dashboard** - Open **Dashboard** from the menu.

Steps

1. Open Open Core HR. The dashboard loads automatically, or click **Dashboard** at the top of the left menu.
2. Read the **quick stats** at the top: your own hours today, your hours this week, your task count, and your ongoing tasks. If you handle approvals, you may also see pending leave requests and pending expense requests here.
3. Scroll down to review the workforce, attendance, and other panels described below.

What you'll see

Depending on your access, the dashboard can include:

- A workforce summary with **Total Users**, today's present, today's absent, on leave, and active employees.
- An **Attendance Trend (This Week)** chart and a **Department Performance** chart.
- **Headcount by Department**, **Leave Trend (6 Months)**, and **Expense Summary (6 Months)** charts.
- A people panel with upcoming birthdays, upcoming work anniversaries, and new joiners.
- An announcements panel with company announcements.
- An upcoming holidays panel.
- A quick actions panel with shortcuts.
- A pending approvals panel (leave and expense) and a **My Weekly Hours** chart.

Tips

- If a chart says there is no data, that area simply has no records for the current period yet.
- Use the quick actions panel to jump straight to the tasks you do most often.

Requires Task module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Task board

The Tasks screen is your organisation-wide view of every task: who created it, who it is assigned to, its priority, status, and due date. From here you can create and assign new tasks and open any task to see its full history.

1. **Tasks** - Open **Tasks** from the menu.

Steps

1. In the left menu, click **Tasks**.
2. Review the summary cards at the top: **Total Tasks**, **New Tasks**, **In Progress**, **Completed**, **Overdue**, and **Due Today**.
3. Scroll down to the **Filters** section and narrow the list by **Status**, **Priority**, **Assigned To**, **Created By**, **Due Date From**, and **Due Date To**. Tick **Show Overdue Only** to see just overdue tasks, then click **Apply Filters**. Click **Clear Filters** to reset.
4. In the **Task List**, switch between table view and grid view using the layout buttons in the top corner.
5. Click **View** on any task to open its details.
6. Click **Refresh** to reload the page with the latest data.

Creating and assigning a task

1. Click **Create Task** at the top of the screen. A panel slides in from the right.
2. Fill in **Task Name**.
3. Choose the person under **Assign To**.
4. Set the **Due Date** and, optionally, a **Due Time**.
5. Choose a **Priority** - Low, Medium, or High.
6. Optionally set **Recurring** to Daily, Weekly, or Monthly. If you do, a **Recurring End Date** is required.
7. Add **Notes** if needed.
8. Click **Create Task**.

Opening task details

The details page shows the task name, status, priority, who it is assigned to, who created it, the description, important dates (created, due, last updated), a completion progress indicator, and a **Task Timeline** of every update - starts, holds, resumes, completions, and any text, image, file, link, or chat updates. Use **Print** to print the page.

What you'll see

- The charts under the summary cards: **Status Distribution** and **Priority Distribution**.
- **Top Task Assigners** and **Most Assigned Users** lists.
- In the table view, columns for **Task #**, **Name**, **Assigned To**, **Created By**, **Priority**, **Status**, **Due Date**, **Progress**, and **Actions**. Overdue tasks show how many days they are overdue; tasks due today are flagged.

Tips

- Progress is shown as a percentage based on status - for example New is 10%, In Progress is 50%, and Completed is 100%. It is not entered manually.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view reports. Availability depends on your company's configuration.

Reports

The Reports screen is where you generate downloadable reports - attendance, leave, and expense - and track the exports you have requested. Open **Reports → All Reports** from the left menu.

1. **Reports** - Open the **Reports** group in the menu.
2. **All Reports** - Then choose **All Reports**.

Steps

1. In the left menu, open **Reports → All Reports**.
2. On the **Generate Reports** tab you will see a card for each report type:
 - **Attendance Report** - employee attendance records with check-in/out times and working hours.
 - **Leave Report** - leave requests active within the selected period.
 - **Expense Report** - expenses with dates within the selected period.
3. On the report card you want, choose the **Date Range Type** - **Monthly** (pick a month) or **Date Range** (pick a **From** and **To** date).
4. Optionally narrow it by **User**.
5. Click **Request Export**. The report is generated in the background.
6. Switch to the **Export History** tab to see your requested exports and download them when they are ready (see [Exports](#)).

Tips

- Reports run in the background, so you can request several and come back later - they do not download instantly.
- If a required field is missing (for example a month or a date), you will be prompted to fill it in before the export can be requested.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view reports. Availability depends on your company's configuration.

Exports

When you request a report, Open Core HR builds the file in the background and lists it under **Export History**. This is where you check progress, download finished files, and clean up old ones. You will find it on the **Export History** tab of the **Reports → All Reports** screen.

1. **Reports** - Open the **Reports** group in the menu.
2. **All Reports** - Then choose **All Reports**.

Steps

1. In the left menu, open **Reports → All Reports**, then click the **Export History** tab.
2. Use the status buttons - **All**, **Pending**, **Processing**, **Completed**, **Failed** - to filter the list.
3. Click **Refresh** to update the list with the latest progress.
4. For a finished export, click the download icon to download the file.
5. For an export that is still pending or processing, click the cancel icon to stop it.
6. To remove an export from the list, click the delete (trash) icon.

What you'll see

Each export in the list shows:

- The report type and a status badge: **Completed**, **Pending**, **Processing**, **Failed**, or **Cancelled**.
- The filters that were used (for example the month or date range or user).
- When it was requested, and once finished, the file size and the number of records.
- An error message if the export failed.

Tips

- A new export starts as **Pending**, moves to **Processing**, and becomes **Completed** when the file is ready - use **Refresh** to see it change.
- If an export shows **Failed**, check the error message, adjust the filters, and request it again from the **Generate Reports** tab.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Employee directory

The **Employees** screen lists everyone in the company and is your starting point for finding a person and opening their profile.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Steps

1. Open **Employees** → **Active** from the **Human Resources** section of the menu.
2. At the top you'll see count cards: **Total**, **Active**, **Onboarding**, **Relieved**, **Suspended**, and **Terminated**. Clicking **Onboarding**, **Relieved**, **Suspended**, or **Terminated** opens that status list. If any employees are in the trash, a strip appears with a **View Deleted** button.
3. Use the filter row to narrow the list by **Department**, **Designation**, **Location**, or **Role**. Each is a dropdown; pick **All Departments** / **All Designations** / **All Locations** / **All Roles** to clear that filter.
4. Type in the **Search employees...** box to search by name, code, email, phone, or role.
5. To open someone's profile, click their name (or the eye icon in the **Actions** column).

What you'll see

The table shows these columns: **ID**, **Employee** (avatar, name, and code), **Email**, **Phone**, **Location** (name and code), **Role**, and **Actions**. You can sort by **ID**, **Employee**, **Email**, and **Phone**. Search, sorting, and paging apply across the whole directory, not just the page you're viewing.

Tips

- The top-right buttons let you add a new employee, import employees from a file, download a sample import file, and export the list. These appear only if you have the matching permission.
- Cells with no value show **N/A**.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Employees by status

Besides the **Active** list, Open Core HR keeps separate lists for employees in other states: **Onboarding**, **Suspended**, **Relieved**, and **Terminated**. Use these to see who is in each state and to move people back to **Active**.

1. **Employees** - Open the **Employees** group in the menu.
2. **Onboarding** - Then choose **Onboarding**.

Opening a status list

1. From the **Human Resources** section of the menu, open **Employees**, then choose **Onboarding**, **Suspended**, **Relieved**, or **Terminated**.
2. You can also click the matching count card on the main **Employees → Active** screen.

Each list shows a short note explaining the status, a count, and a table with **ID**, **Employee**, **Email**, **Phone**, **Changed On**, **Changed By**, **Reason**, and **Actions**. **Changed On**, **Changed By**, and **Reason** come from the most recent status change. Use the search box and the **Back** arrow (top-left) to return to the directory.

Moving an employee back to Active

1. Open the status list the employee is in.
2. In the **Actions** column, click **Move to Active**.
3. In the **Move to Active** dialog, optionally type a **Reason (optional)** for the audit trail, then confirm.
4. The employee returns to the **Active** list immediately.

Changing an employee's status

Status changes are made from the employee's profile, not from these lists. Open the employee's profile, click **Actions**, and choose one of:

- **Reactivate** - restore full access (shown when the employee isn't already active).
- **Suspend** - disable access temporarily. The Microsoft 365 account is disabled but the license is kept.
- **Relieve** - for resignations or end of contract. The Microsoft 365 account is deleted after a grace period.
- **Terminate** - permanent deactivation. The Microsoft 365 account is deleted after a grace period.

In the confirmation dialog you can add an optional **Reason** (up to 500 characters) that's stored with the change.

Caution

If the employee manages other people, the app warns you that those direct reports will be left without a manager and asks you to confirm before continuing. You also can't change your own status to anything other than active.

Deleting from a status list

In the **Actions** column you may also see a delete (trash) icon. This moves the employee to the **Deleted Employees** list; you'll be asked to type the employee's code to confirm. See [Deleted employees](#).

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Deleted employees

When an employee is deleted they aren't removed straight away - they go to the **Deleted Employees** list, where you can restore them or remove them permanently.

1. **Employees** - Open the **Employees** group in the menu.
2. **Deleted** - Then choose **Deleted**.

Opening the list

1. From the **Human Resources** section of the menu, open **Employees → Deleted**.
2. You can also use the **View Deleted** button that appears on the **Employees → Active** screen when there are deleted records.

The table shows **ID**, **Employee**, **Email**, **Phone**, **Last Status** (the status the employee had before deletion), **Deleted On**, and **Actions**. Use the **Search deleted employees...** box to find someone, and the **Back** arrow to return to the directory.

Restoring an employee

1. Find the employee in the list.
2. In the **Actions** column, click **Restore**.
3. The employee is brought back with the **Active** status. If they had a Microsoft 365 account that was disabled, it is re-enabled.

Permanently deleting an employee

1. Find the employee in the list.
2. In the **Actions** column, click the trash icon.
3. In the **Permanently Delete Employee** dialog, click **Permanently Delete**.

Caution

Permanent deletion removes the employee from the system and deletes their Microsoft 365 account immediately. This cannot be undone.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · create employees. Availability depends on your company's configuration.

Adding an employee

Use the **Add Employee** form to create a new employee record. The form is split into steps; you move through them in order, and each step is checked before you continue.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.
3. **Add New** - Open the form to add a new employee.

Steps

1. From the **Human Resources** section of the menu, open **Employees → Active**, then click **Add New**. (You can also use **Employee** under the quick-create menu.)
2. **Basic Info** - enter **First Name**, **Last Name**, **Email**, **Gender**, **Phone**, **Date of Birth**, and **Address**. **Alternate Phone** is optional. You can also add a profile picture here.
3. **Employment** - choose **Location**, then **Department**, **Designation**, **Shift**, and **Date of Joining**. **Reporting To** is optional. There's also a checkbox to mark that the employee still needs onboarding.
4. **Account & Pay** - choose the **Role** and enter the **Gross Salary**.
5. **Bank Details** - enter **Bank Name**, **Branch**, **Account Holder Name** and **Account Number**, plus whichever identifiers your banks use: **Bank Code**, **IBAN**, **SWIFT / BIC**.
6. **Emergency Contact** - enter the contact's name, phone number, alternate phone (optional), and relationship.
7. **Leave Allocation** - set the starting leave count for each leave type. This step appears only if leave types are set up.
8. On the last step, save the form. You're taken back to the **Employees → Active** list with a confirmation.

The employee code

When you pick a **Location**, Open Core HR fills in the next **Employee Code** automatically - your organisation's prefix followed by a number, e.g. EMP-0001. Set the prefix under **Settings → Code Prefix**. You can change an individual code if you need to; it must be unique.

Microsoft 365 email check

If your organization provisions Microsoft 365 mailboxes automatically, Open Core HR suggests a sign-in email from the employee's first and last name and checks whether it's available. The **Email** field is filled with this suggested address. If the check can't reach Microsoft, you'll see a note that availability will be confirmed when the mailbox is created.

What happens after you save

The employee is created. If onboarding was selected, they start in the **Onboarding** status; otherwise they're **Active**. Their bank details and leave allocations are saved, and - if automatic provisioning is on - a Microsoft 365 mailbox is created for them.

Troubleshooting

- If the email, phone number, or employee code is already used by another record, the form won't save and shows the conflict - change the value and try again.
- You can't move forward until the current step's required fields are filled in correctly.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

The employee profile

The **Employee Profile** screen brings together everything Open Core HR holds about one person. This page is an overview; the sections below link to detailed how-tos.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Opening a profile

From the **Human Resources** section of the menu, open **Employees → Active** (or any status list), then click an employee's name. You can also use the eye icon in the **Actions** column.

The header

At the top you'll see the employee's photo, name, a status badge (**Active**, **Onboarding**, **Suspended**, **Relieved**, or **Terminated**), and - if they have a Microsoft 365 mailbox - an **M365** marker. Below that are their designation, department, code, email, phone, and location. An **Actions** menu lets you reactivate, suspend, relieve, terminate, or delete the employee (the options shown depend on the current status and your permissions). If you can edit, clicking the photo lets you change it.

Tabs

- **Overview - Work Information** (department, designation, shift, location, reporting manager, date of joining), **Contact Information** (email, phone, alternate phone, date of birth, gender, address), **Compensation** (gross salary), and **HR Locations** (extra work locations, if any).
- **Personal - Personal Details** (parents' names, marital status, spouse, blood group, qualification, personal email, anniversary date, previous and total experience, current and permanent address) and **Emergency Contact**.
- **Leaves - Leave Balance** cards for the current year, showing entitled, used, available, carried-forward and additional days, plus any loss-of-pay (LOP) days.
- **Documents** - the employee's documents, one row per document type, with options to upload, view, and download.
- **Bank - Bank Account Details**.
- **Device** - the mobile **Registered Device** the employee uses, with battery, GPS, Wi-Fi, location, and a **Remove Device** option.
- **Microsoft 365** - shown only when the employee has a mailbox; covers the sign-in email, when it was provisioned, and password management.
- **Activity** - a timeline of changes made to the employee record.

Editing

Most sections on the Overview, Personal, and Bank tabs have an edit (pencil) button that opens a slide-over panel where you make changes and click **Update**. Editing options appear only if you have permission.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Editing basic information

You can update an employee's name, contact details, date of birth, gender, and address from the **Contact Information** card on their profile.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Steps

1. Open the employee's profile (from the **Human Resources** section of the menu, **Employees → Active**, then click the person).
2. On the **Overview** tab, find the **Contact Information** card and click the edit (pencil) button.
3. In the **Edit Contact Information** panel, update any of: **First Name**, **Last Name**, **Email**, **Phone**, **Alternate Phone**, **Date of Birth**, **Gender** (Male, Female, or Other), and **Address**.
4. Click **Update** to save, or **Cancel** to close without saving.

Tips

- Phone numbers must be 10 digits.
- If a value can't be saved (for example an email that's already used), the panel shows the error next to that field.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Editing work information

The **Work Information** card on an employee's profile holds their department, designation, shift, location, reporting manager, role, and date of joining.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Steps

1. Open the employee's profile (from the **Human Resources** section of the menu, **Employees → Active**, then click the person).
2. On the **Overview** tab, find the **Work Information** card and click the edit (pencil) button.
3. In the **Edit Work Information** panel, update any of: **Department**, **Designation**, **Shift**, **Location**, **Reporting To** (search for and pick a manager), **Role**, and **Date of Joining**.
4. Click **Update** to save, or **Cancel** to close without saving.

Tips

- **Reporting To** is optional - leave it empty if the employee has no manager.
- Changing the **Role** changes what the employee can access in Open Core HR.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Editing compensation

The **Compensation** card on an employee's profile holds their gross salary and statutory numbers.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Steps

1. Open the employee's profile (from the **Human Resources** section of the menu, **Employees → Active**, then click the person).
2. On the **Overview** tab, find the **Compensation** card and click the edit (pencil) button.
3. In the **Edit Compensation** panel, update the **Gross Salary**.
4. Click **Update** to save, or **Cancel** to close without saving.

Note

The **Compensation** card is only shown to people with permission to view employee details.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Editing personal information

The **Personal Details** card on the **Personal** tab holds family details, identity numbers, qualifications, experience, and addresses.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Steps

1. Open the employee's profile (from the **Human Resources** section of the menu, **Employees → Active**, then click the person).
2. Go to the **Personal** tab, find the **Personal Details** card, and click the edit (pencil) button.
3. In the **Edit Personal Details** panel, update any of: **Father's Name**, **Mother's Name**, **Marital Status** (Single, Married, Divorced, or Widowed), **Spouse Name**, **Anniversary Date**, **Blood Group**, **Qualification**, **Personal Email**, **Current Address**, **Permanent Address**, **Previous Experience**, and **Total Experience**.
4. Click **Update** to save, or **Cancel** to close without saving.

Note

All fields here are optional - fill in whatever you have.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Editing emergency contacts

The **Emergency Contact** card on the **Personal** tab holds the person to reach if something happens to the employee.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Steps

1. Open the employee's profile (from the **Human Resources** section of the menu, **Employees → Active**, then click the person).
2. Go to the **Personal** tab, find the **Emergency Contact** card, and click the edit (pencil) button.
3. In the **Edit Emergency Contact** panel, enter the **Contact Name**, **Phone Number**, **Alternate Phone** (optional), and **Relation** (Parent, Spouse, Sibling, Child, Friend, or Other).
4. Click **Update** to save, or **Cancel** to close without saving.

Tips

- **Contact Name**, **Phone Number**, and **Relation** are required. Phone numbers must be 10 digits.

Requires Documents module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Employee documents

The **Documents** tab on an employee's profile lists one row per document type (for example ID proof, address proof), so you can see at a glance which documents are on file and add or view them.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Adding or replacing a document

1. Open the employee's profile and go to the **Documents** tab.
2. Find the document type's row.
3. If nothing is on file yet, click **Upload** and pick the file. If a document is already there, click the upload icon to replace it.

Bulk uploading documents

1. On the **Documents** tab, click **Bulk Upload**.
2. In the **Bulk Document Upload** panel, for each row pick a **Document Type** and choose a **File**. Click **Add Another Document** to add more rows (up to 10).
3. Click **Upload Documents** to save them all, or **Cancel** to close.

Supported file types are PDF, DOC, DOCX, JPG, JPEG, and PNG, up to 10 MB per file.

Viewing and downloading

For a row that has a document:

- Click **View**, then **View in Browser** to open it in a new tab, or **Open Direct Link** to open the stored file directly.
- Click the download icon to download just that document.

Download all

Click **Download All** at the top of the **Documents** tab to get a single zip file containing every document on file for the employee, organized by document type. This button appears only when at least one document exists.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Employee bank accounts

The **Bank** tab on an employee's profile holds the bank account used for their pay.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Steps

1. Open the employee's profile (from the **Human Resources** section of the menu, **Employees → Active**, then click the person).
2. Go to the **Bank** tab. The **Bank Account Details** card shows the account name, bank name, branch, account number, and the bank identifiers - or a note if nothing is on file yet.
3. Click the edit (pencil) button on the card.
4. In the **Edit Bank Account** panel, enter the **Bank Name**, **Branch** and **Account Number** - all three are required - then whichever identifiers your banks use: **Bank Code** (an IFSC in India, a sort code in the UK, a routing number in the US), **IBAN**, and **SWIFT / BIC**. Those three are optional.
5. Click **Update** to save, or **Cancel** to close without saving.

Tips

- The account holder name is taken from the employee's name automatically.
- The **Account Number** must be digits only. The identifier fields are stored in upper case and are not checked against any one country's format, so they work wherever you run Open Core HR.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Employee leave balances

The **Leaves** tab on an employee's profile shows their leave balance for the current year.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Viewing leave balances

1. Open the employee's profile (from the **Human Resources** section of the menu, **Employees → Active**, then click the person).
2. Go to the **Leaves** tab. You'll see a card for each leave type the employee has an allocation for, showing the year and the **Entitled**, **Used**, and **Available** counts. Cards may also show **Carried Forward** and **Additional** days, and a **LOP** marker with the number of loss-of-pay days if any apply.
3. If nothing has been allocated, you'll see "No leave allocations found for this employee."

Setting leave counts

Starting leave counts are set when you first add an employee, on the **Leave Allocation** step of the **Add Employee** form. The profile's Leaves tab shows balances only and has no edit control. For ongoing changes to leave balances, use **Leave Management → Balance Management** from the **Human Resources** section of the menu.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Employee devices

The **Device** tab on an employee's profile shows the mobile device they've registered for the Open Core HR app, and lets you remove it.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Viewing the registered device

1. Open the employee's profile (from the **Human Resources** section of the menu, **Employees → Active**, then click the person).
2. Go to the **Device** tab. The **Registered Device** card shows details such as **Device Name**, **Device Model**, **OS Version**, **App Version**, **Registered On**, **Device Type**, **Device ID**, **Battery Level**, **GPS Status**, **WiFi Status**, and **Location**.
3. If the employee hasn't registered a device, you'll see "No device registered for this employee."

Removing a device

1. On the **Device** tab, click **Remove Device**.
2. The device is removed.

Caution

After you remove the device, the employee can't use the mobile app until they register a new one.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

An employee's change history

Open Core HR keeps a history of changes made to each employee record. You can review it on the **Activity** tab of the employee's profile - it isn't a separate screen.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Steps

1. Open the employee's profile (from the **Human Resources** section of the menu, **Employees** → **Active**, then click the person).
2. Click the **Activity** tab. The history loads as a timeline, newest first.
3. Each entry shows what happened (for example a record being created or updated), when it happened, the fields that changed (old value to new value), a **Reason** if one was given, and who made the change.

Tips

- If nothing has been recorded yet, you'll see "No activity recorded yet."
- When someone changes the employee's status (Suspend, Relieve, Terminate, Reactivate), any reason they typed shows up here as part of that entry.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · import employees. Availability depends on your company's configuration.

Importing employees

If you have several people to add at once, you can import them from a spreadsheet instead of filling in the **Add Employee** form for each one.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Steps

1. From the **Human Resources** section of the menu, open **Employees → Active**.
2. Click **Download Sample** to get the import template. Fill in one row per employee, following the columns in the template.
3. Click **Import Employees** and choose your filled-in file. Accepted file types are `.xlsx`, `.xls`, and `.csv`.
4. Wait for the import to finish. On success you'll see a confirmation and the new employees appear in the directory.

Troubleshooting

- If some rows have problems, the import is rejected and you'll see the first few errors with their row numbers (for example a duplicate email or a missing required value). Fix those rows in your file and import again.
- The **Download Sample** and **Import Employees** buttons appear only if you have permission to create employees.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · export employees. Availability depends on your company's configuration.

Exporting employees

You can download the employee list as a spreadsheet to share or work with outside Open Core HR.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Steps

1. From the **Human Resources** section of the menu, open **Employees → Active**.
2. Click **Export Employees**.
3. A spreadsheet file downloads to your computer.

Tips

- The **Export Employees** button appears only if you have permission to view employees.
- If the export can't be produced, you'll see an error message - try again, and contact support if it keeps failing.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Employee work locations

In addition to an employee's main location, Open Core HR can record extra work locations for them. These appear as the **HR Locations** card on the **Overview** tab of the employee's profile.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Viewing work locations

1. Open the employee's profile (from the **Human Resources** section of the menu, **Employees** → **Active**, then click the person).
2. On the **Overview** tab, look for the **HR Locations** card. It lists each extra location as a tag. The card only appears when the employee has at least one extra location.

Adding or removing a work location

Note

The **HR Locations** card lists the extra locations but has no add or remove control on this screen. The employee's main location is set on the **Work Information** card - see [Editing work information](#).

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Attendance records

The All Attendance screen lists daily attendance records for your employees, with check-in and check-out times, hours worked, and status flags. Open **Attendance** → **All Attendance** from the left menu.

1. **Attendance** - Open the **Attendance** group in the menu.
2. **All Attendance** - Then choose **All Attendance**.

Steps

1. Open **Attendance** → **All Attendance**.
2. Use the filters above the table to narrow the list:
 - **Date** - show records for one specific day.
 - **Employee** - pick one person, or leave it on **All Users**.
3. Use the **Search attendance...** box to find records by employee name, employee code, shift name, or date.
4. Click the chevron at the start of a row to expand a quick **Session Timeline** for that day.
5. Click the eye icon in the **Actions** column to open the full **Attendance Details** panel.
6. Click the map-pin icon in the **Actions** column to open that employee's location timeline for the day in a new tab.

What you'll see

The table has these columns:

- **Date** - the attendance date.
- **Employee** - name and employee code.
- **Shift** - the shift assigned for that day, or "N/A" if none.
- **Time In/Out** - the first check-in time and the last check-out time. A **Late** badge with the late duration appears next to the check-in if the employee arrived late. Check-out shows "--:--" until the employee checks out.
- **Duration** - total hours worked that day, with a small progress bar (scaled against an 8-hour day).
- **Sessions** - how many work sessions were recorded that day (for example, "1 session"). If the employee is still checked in, this shows **Active** instead.
- **Status** - quick badges: **Late**, **Early** (early departure), and **OT** with the overtime hours. If none apply, a green check is shown.
- **Actions** - view details and view timeline buttons (see the Steps above).

For the full per-day breakdown opened from the eye icon, see [A day's attendance sessions](#).

Tips

- Records appear here automatically as employees check in and out from the mobile app - you don't create them on this screen.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Attendance analytics

The Analytics screen turns attendance data into trends, department comparisons, tracking-quality figures, and a list of anomalies. Open **Attendance** → **Analytics** from the left menu (you can also reach it from the **Analytics** button on the All Attendance screen).

1. **Attendance** - Open the **Attendance** group in the menu.
2. **Analytics** - Then choose **Analytics**.

Steps

1. Open **Attendance** → **Analytics**.
2. Choose a **Period**: **Last 7 Days**, **Last 30 Days**, **Last 90 Days**, or **Custom**. If you pick **Custom**, set a **Start Date** and **End Date**.
3. Optionally pick a **Department**, or leave it on **All Departments**.
4. Click **Apply** to refresh the figures. Click **Clear** to reset to the last 30 days and all departments.

What you'll see

- **Summary cards** - **Present**, **Punctuality** (percentage), **Avg Hours**, and **Overtime**.
- **Attendance Trend** - a bar chart of **Present** versus **Late** counts per day for the selected period.
- **Department Statistics** - for each department: employee count, number of records, average working hours, a "late" badge if anyone was late, and a punctuality percentage.
- **Working Hours Distribution** - a stacked bar chart of **Regular Hours** and **Overtime** per day.
- **Late Arrivals by Department** - a bar for each department showing how many late arrivals it had.
- **Anomalies & Alerts** - a list of flagged items, each showing the employee name and code, a severity badge (**critical**, **warning**, or **info**), the date, and a short message. If nothing is flagged, it reads "No anomalies detected."

Tips

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

A day's attendance sessions

Each attendance record can hold several work sessions and breaks for the same day. You can see the session log without leaving the All Attendance screen - it opens as a slide-over panel, not a separate page.

1. **Attendance** - Open the **Attendance** group in the menu.
2. **All Attendance** - Then choose **All Attendance**.

Steps

1. Open **Attendance** → **All Attendance**.
2. Find the row for the employee and date you want.
3. To see a quick session timeline, click the chevron at the start of the row. A **Session Timeline** strip expands under the row, listing each event (**Check In**, **Check Out**, **Break Start**, **Break End**) with its time and address, plus the session count.
4. For full details, click the eye icon in the **Actions** column. The **Attendance Details** panel slides in from the right with three tabs:
 - o **Summary** - employee, date, shift, working hours, check-in and check-out times, late hours, overtime, and any notes.
 - o **Sessions** - the full list of check-in, check-out, break-start and break-end events, each with its time, address, and notes. A "Session is active (not checked out)" banner appears if the employee is still checked in.
 - o **Metrics** - a time summary of the day: late, early, overtime and working hours.
5. Click **Close** to dismiss the panel.

What you'll see

- The expanded row shows a compact vertical timeline of events for that day.
- The slide-over panel is read-only - it shows what was recorded; it does not let you edit the sessions.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Adding or correcting an attendance entry

There is currently no screen in the workspace for adding a new attendance record by hand or for editing an existing one. The All Attendance screen (**Attendance** → **All Attendance**) is read-only: you can filter records, expand the session timeline, open the **Attendance Details** panel, and open an employee's location timeline, but there is no create, edit, or delete action on it.

1. **Attendance** - Open the **Attendance** group in the menu.
2. **All Attendance** - Then choose **All Attendance**.

Attendance records are created automatically when employees check in and out from the mobile app, including any breaks they record.

If a record looks wrong, use the [session timeline and details panel](#) to see exactly what was captured.

Note

Note

There is no screen for creating, editing or deleting an attendance record by hand. Corrections go through the routes described above.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

All leave requests

The All Leave Requests screen lists employee leave requests so you can filter, review, approve, reject, or cancel them. Open **Leave Management** → **All Leave Requests** from the left menu.

1. **Leave Management** - Open the **Leave Management** group in the menu.
2. **All Leave Requests** - Then choose **All Leave Requests**.

Steps

1. Open **Leave Management** → **All Leave Requests**.
2. Use the filters above the table to narrow the list:
 - **Employee** - pick one person, or leave it on **All Employees**.
 - **Status** - **Pending, Approved, Rejected, Cancelled**, or **All Statuses**.
 - **Leave Type** - pick a leave type, or leave it on **All Leave Types**.
 - **From Date / To Date** - limit to requests whose leave dates fall in that range.
3. Use the **Search leave requests...** box to find requests by ID, status, reason text, employee name or code, or leave type name.
4. To act on a row, use the buttons in the **Actions** column (see below).
5. If you have permission, the **Add Request** button at the top right lets you create a request for an employee - see [Creating leave for an employee](#).

What you'll see

The table has these columns:

- **ID** - the request number.
- **Employee** - name and employee code.
- **Leave Type** - the leave type used.
- **Leave Days** - the from date, and the to date if the leave spans more than one day.
- **Days** - total days, or "0.5" with "(1st Half)" / "(2nd Half)" for a half-day request.
- **Reason** - the employee's note (hover to see the full text).
- **Document** - a link icon if a supporting document was attached.
- **Status** - a badge: **Pending, Approved, Rejected**, or **Cancelled**.
- **Actions** - for **Pending** requests, approve and reject buttons (if you can approve leave); for **Approved** requests, a cancel button (if you can cancel leave); and an eye icon to open the request - see [A leave request's details](#).

Tips

- What you can see and do depends on your role. People who can only view their own leaves see just their requests; a team leader sees their team's requests.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

A leave request's details

Open a leave request to see its dates, type, reason, the employee's leave balance, the approval timeline, and recent leave history.

1. **Leave Management** - Open the **Leave Management** group in the menu.
2. **All Leave Requests** - Then choose **All Leave Requests**.

Steps

1. Open **Leave Management** → **All Leave Requests**.
2. Click the eye icon in the **Actions** column of the request you want. The **Leave Request #** page opens.

What you'll see

- **Header** - the request number and, on the right, any available action buttons (**Approve**, **Reject**, **Cancel**, **Edit**) depending on the request status and your permissions.
- **Leave info card** - the leave type (with its colour dot and code), a status badge, the **Date Range**, and the **Duration** (number of days, or "0.5 day" with the half-day type). Below that, when present: the **Reason**, a "Comp Off" note if comp-off days were used, **Emergency Contact** name and phone, an "Abroad" note with the location, and a **View Document** link if a supporting file was attached.
- **Timeline card** - **Request Created** with the date, then **Approved by**, **Rejected by**, or **Cancelled by** entries (with date and any notes or reason) as they happen.
- **Recent Leave History card** - the employee's last few leave requests, each with type, date range, day count, and status.
- **Employee card** (sidebar) - name, employee code, designation, and department.
- **Balance card** (sidebar) - for the leave type used: **Entitled**, **Used**, **Pending**, and **Available** days.

To take action on the request, see [Reviewing a leave request](#).

Tips

- The **Edit** button (when shown) opens a slide-over to change the dates, half-day setting, reason, supporting document, emergency contact, and abroad details. The leave type itself can't be changed there.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Reviewing a leave request

You can approve or reject a pending leave request, or cancel one that's already approved. Do this either from the **Actions** column on **Leave Management → All Leave Requests** or from the request's detail page.

1. **Leave Management** - Open the **Leave Management** group in the menu.
2. **All Leave Requests** - Then choose **All Leave Requests**.
3. **Approve** - On a **Pending** request, click the **approve** (check) button - or open the detail page and click **Approve**.
4. **Notes** - (Optional) Add notes for the employee.
5. **Approve** - Confirm - the request is approved and the employee is notified.
6. **Reject** - On a **Pending** request, click the **reject** (X) button - or click **Reject** on the detail page.
7. **Reason** - Required. Explain why you're rejecting the request.
8. **Reject** - Confirm - the request is rejected.
9. **Cancel** - For an **Approved** request, click the **cancel** button to cancel the leave.

Steps

Approve a request

1. Open **Leave Management → All Leave Requests** (or open the request's detail page).
2. For a **Pending** request, click the approve (check) button, or click **Approve** on the detail page.
3. Optionally add **Notes (optional)** in the dialog.
4. Click **Approve**.

When approved, the leave days are deducted from the employee's balance, any comp-off days they chose to use are marked as used, and the employee is notified.

Reject a request

1. For a **Pending** request, click the reject (X) button, or click **Reject** on the detail page.
2. Enter a **Reason** - this field is required.
3. Click **Reject**.

The employee is notified, and any comp-off days they had reserved are released.

Cancel an approved request

1. For an **Approved** request, click the cancel button, or click **Cancel** on the detail page.
2. Optionally add **Notes (optional)** in the dialog.
3. Click **Cancel Leave**.

The leave balance is restored, any comp-off days are released, and the employee is notified.

Tips

- Only **Pending** requests can be approved or rejected; only **Approved** requests can be cancelled.
- An approved leave that has already started or passed can't be cancelled.
- The approve, reject, and cancel buttons only appear if your role allows those actions.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Creating leave for an employee

If your role allows it, you can submit a leave request on behalf of an employee. Open **Leave Management → All Leave Requests** and click **Add Request** at the top right.

1. **Leave Management** - Open the **Leave Management** group in the menu.
2. **All Leave Requests** - Then choose **All Leave Requests**.
3. **Add Request** - Click **Add Request** at the top right.
4. **Employee** - Pick the employee the leave is for.
5. **Leave Type** - Pick the leave type.
6. **From Date** - Start date of the leave.
7. **To Date** - End date. The working days are calculated automatically.
8. **Half Day Leave** - Turn on for a half day, then choose **First Half** or **Second Half**.
9. **Reason** - Required. Why the leave is needed.
10. **Supporting Document** - (Optional) PDF / JPG / PNG.
11. **Travelling Abroad** - (Optional) Turn on and enter the location if the employee is travelling abroad.
12. **Emergency Contact** - (Optional) Name of someone to reach during the leave.
13. **Create Leave Request** - Save - the request appears in the leave list under the employee's name.

Steps

1. Open **Leave Management → All Leave Requests** and click **Add Request**.
2. Pick the **Employee**.
3. Pick the **Leave Type**.
4. Set the **From Date** and **To Date**. The screen shows the calculated number of working days (weekends and holidays excluded) once both dates are set.
5. If it's a half day, turn on **Half Day Leave** and choose **First Half** or **Second Half**.
6. Enter a **Reason** - this is required.
7. Optionally attach a **Supporting Document** (PDF, JPG, or PNG).
8. If the employee will be travelling abroad, turn on **Travelling Abroad** and enter the location.
9. Optionally fill in **Emergency Contact** and **Emergency Phone**.
10. Click **Create Leave Request**.

Tips

- The **Add Request** button only appears if your role can create leave for other people.
- After it's created, the request shows up in the All Leave Requests list and follows the normal approval flow - see [Reviewing a leave request](#).

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Leave types

Leave types are the categories employees pick when they apply for leave - for example casual leave, sick leave, or earned leave. Open **Leave Management** → **Leave Types** from the left menu.

1. **Leave Management** - Open the **Leave Management** group in the menu.
2. **Leave Types** - Then choose **Leave Types**.

Steps

1. Open **Leave Management** → **Leave Types**.
2. Use the **Search leave types...** box to find a type by ID, name, code, or notes.
3. Click the eye icon on a row to view that type's full settings in a pop-up.
4. Click the pencil icon to edit a type, or the trash icon to delete it (both appear only if your role allows it).
5. Click **Add New** at the top right to create a new type - see [Creating or editing a leave type](#).

What you'll see

The table has these columns:

- **ID** - the leave type number.
- **Name** - the leave type's name.
- **Code** - its short code (for example "CL", "SL", "EL").
- **Notes** - any notes saved on it, or "-" if none.
- **Proof Required** - **Required** or **Not Required**, showing whether a supporting document is needed when this type is used.
- **Status** - **Active** or **Inactive**. Only active types are offered when applying for leave.
- **Actions** - view, edit, and delete buttons (see the Steps above).

Tips

- A leave type that's already used by existing leave requests can't be deleted - make it **Inactive** instead.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Creating or editing a leave type

You create and edit leave types from a slide-over panel on the Leave Types screen. Open **Leave Management → Leave Types** and click **Add New**, or click the pencil icon on an existing type.

1. **Leave Management** - Open the **Leave Management** group in the menu.
2. **Leave Types** - Then choose **Leave Types**.
3. **Add New** - Click **Add New** to create a leave type, or the pencil on a row to edit.
4. **Name** - Required. The leave type name (e.g. **Casual Leave**).
5. **Code** - Required. Short code shown in tables (e.g. **CL, SL, EL**).
6. **Notes** - (Optional) Description or remarks.
7. **Create** - Save the leave type - it appears in the list.

Steps

1. Open **Leave Management → Leave Types**.
2. Click **Add New** to create one, or the pencil icon on a row to edit one. The **Add Leave Type / Edit Leave Type** panel slides in from the right.
3. Fill in the fields:
 - **Name** (required) - the leave type's name.
 - **Code** (required) - a short code such as "CL", "SL", or "EL".
 - **Notes** - optional notes.
 - **Proof Required** - turn on if a supporting document must be attached when this type is used.
 - **Compensatory Off Type** - turn on if this type represents compensatory off.
 - **Deductible** - turn on if using this type should reduce the employee's leave balance.
 - **Auto Deduct From** - optionally enter another leave type's code to draw from automatically.
 - **Monthly Limit** - the most days of this type allowed per month; leave blank for no limit.
 - **Yearly Limit** - the most days of this type allowed per year; leave blank for no limit.
 - **Requires Advance Notice** - turn on if employees must give notice before taking this leave. When on, set **Advance Notice Days**.
 - **Status** - on for **Active**, off for **Inactive**.
4. Click **Create** (or **Update** when editing).

Tips

- The annual entitlement each employee actually gets is set on the [Leave balance management](#) screen, not here - this screen only defines the leave type and its limits.
- Codes need to be unique; if you enter one that's already in use you'll be asked to change it.

Note

Note

There is no separate "annual allotment", "paid" or "carry-forward" field on this form. Yearly entitlement is handled through **Balance Management** rather than on the leave type itself.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Leave balance management

The Balance Management screen shows every employee's current leave balance for each leave type, and is the starting point for setting, adjusting, importing, and reporting on balances. Open **Leave Management** → **Balance Management** from the left menu.

1. **Leave Management** - Open the **Leave Management** group in the menu.
2. **Balance Management** - Then choose **Balance Management**.

Steps

1. Open **Leave Management** → **Balance Management**.
2. Use the **Search employees...** box to find someone by name or employee code.
3. Click the eye icon on a row to open that employee's balance detail page.
4. If your role can manage balances, use the **Actions** menu at the top right for **Download Sample Template, Import Balances, Bulk Set Initial Balance**, and **View Summary Report** - see [Bulk importing leave balances](#) and [Setting and adjusting leave balances](#).

What you'll see

The list

Each row is one employee, with columns: **Emp Code**, **Employee**, **Designation**, then one column per leave type showing the current available days for that type (green when above zero), and an **Actions** column with the eye icon.

An employee's balance page

Opening a row shows:

- **Summary cards** - **Total Entitled**, **Used**, **Available**, and **LOP Days** (loss-of-pay days) for the year.
- **Leave balance cards** - one card per leave type with a used/total progress bar and a breakdown of **Entitled**, **Carried Forward**, **Additional**, and **Available**, plus a LOP note if any. Each card has a **Set Initial** or **Adjust** button depending on whether a balance has been set yet and your permissions.
- **Detailed Breakdown table** - the same numbers in a table: Leave Type, Entitled, Carried Forward, Additional, Total, Used, Available, LOP, and an Actions column.
- **Recent Adjustments** - a log of recent manual changes, each showing the leave type, whether days were added or deducted, the reason, who made the change, the before/after balance, and the date.

Summary report

The **View Summary Report** option opens an organization-wide overview: **Total Entitled**, **Total Used**, **Total Available**, and **Total Pending** cards; one card per leave type with a used/total bar and Entitled / Used / Available / Pending figures; and a **Summary by Leave Type** table that also shows a usage-rate badge for each type.

Tips

- "LOP" stands for loss of pay - days an employee took beyond their available balance.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Setting and adjusting leave balances

There are two ways to change one employee's leave balance: set the initial entitlement for a leave type that doesn't have one yet, or make an adjustment (add or deduct days) on a leave type that already has a balance. Both are done from the employee's balance page.

1. **Leave Management** - Open the **Leave Management** group in the menu.
2. **Balance Management** - Then choose **Balance Management**.
3. **View** - Click the **eye** icon next to the employee to open their balance.
4. **Set Initial** - Find a leave type that has no balance yet and click **Set Initial**.
5. **Entitled Leaves** - Days the employee should start the year with. Steps of 0.5 are allowed.
6. **Set Balance** - Save the starting balance.
7. **Adjust** - On a leave type that already has a balance, click **Adjust**.
8. **Adjustment Type** - **Add** or **Deduct**.
9. **Days** - Number of days. Steps of 0.5 are allowed.
10. **Reason** - Required. Why the adjustment is being made.
11. **Apply Adjustment** - Save - the new balance shows in the leave-type card.

Steps

Set the initial balance for a leave type

1. Open **Leave Management** → **Balance Management** and click the eye icon next to the employee.
2. Find the leave type card (or table row) that shows no balance yet and click **Set Initial**. A **Set Initial Balance** panel slides in.
3. The **Leave Type** is shown (read-only).
4. Enter the **Entitled Leaves** - the number of days the employee should start the year with (steps of 0.5 are allowed).
5. Click **Set Balance**.

Adjust an existing balance

1. On the same employee's balance page, find a leave type that already has a balance and click **Adjust**. An **Adjust Balance** panel slides in.
2. The **Leave Type** is shown (read-only).
3. Choose the **Adjustment Type** - **Add** or **Deduct**.
4. Enter the number of **Days** (steps of 0.5 are allowed).
5. Enter a **Reason** - this is required.
6. Click **Apply Adjustment**.

The change is recorded in the **Recent Adjustments** log on the page, showing the before/after balance, the reason, and who made it.

Tips

- **Set Initial** appears only before a leave type has any balance for that year; after that, use **Adjust**.
- To set a starting balance for many employees at once, use **Bulk Set Initial Balance** or an import instead - see [Bulk importing leave balances](#).
- The **Set Initial** and **Adjust** buttons appear only if your role has the matching permission.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Bulk importing leave balances

Instead of setting each employee's leave balance one at a time, you can set the same balance for everyone in one step, or upload a spreadsheet with per-employee figures. These options live in the **Actions** menu on the Balance Management screen and need a role that can manage leave balances.

1. **Leave Management** - Open the **Leave Management** group in the menu.
2. **Balance Management** - Then choose **Balance Management**.
3. **Actions** - Click **Actions** at the top right.
4. **Download Sample Template** - Downloads a spreadsheet you can fill in with employee balances.
5. **Import Balances** - Pick the filled file (.xlsx, .xls, or .csv) - balances are imported for the current year.
6. **Bulk Set Initial Balance** - Opens a panel to set the same initial entitlement for many employees at once.
7. **Year** - The year the balance applies to.
8. **Leave Type** - Pick the leave type.
9. **Entitled Days** - Days each employee should get. Steps of 0.5 are allowed.
10. **Set Balance** - Apply the balance to all selected employees.

Steps

Download the template

1. Open **Leave Management** → **Balance Management**.
2. Open the **Actions** menu at the top right and choose **Download Sample Template**. A spreadsheet downloads that you can fill in with employee balances.

Import balances from a spreadsheet

1. Fill in the downloaded template.
2. Open the **Actions** menu and choose **Import Balances**.
3. Pick your file (.xlsx, .xls, or .csv). The balances are imported for the current year and a summary message tells you the result.

Set the same initial balance for many employees

1. Open the **Actions** menu and choose **Bulk Set Initial Balance**. A panel slides in.
2. Set the **Year**.
3. Pick the **Leave Type**.
4. Enter the **Entitled Days** to give each employee (steps of 0.5 are allowed).
5. Leave **Apply to All Employees** on to set it for every active employee, or turn it off and add specific employees with the search box.
6. Click **Set Balance**.

Tips

- Imports apply to the current year. To set balances for a different year, use **Bulk Set Initial Balance** and pick the year there.
- These options appear only if your role can manage leave balances.

Note

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Compensatory offs (admin)

A compensatory off ("comp off") is time off an employee earns by working extra. The Compensatory Offs screen lets you review those requests, approve or reject them, and see who has comp-off days available. Open **Leave Management** → **Compensatory Offs** from the left menu.

1. **Leave Management** - Open the **Leave Management** group in the menu.
2. **Compensatory Offs** - Then choose **Compensatory Offs**.

Steps

1. Open **Leave Management** → **Compensatory Offs**.
2. Use the filters above the table to narrow the list:
 - **Status** - **Pending**, **Approved**, **Rejected**, or **All Statuses**.
 - **Employee** - pick one person, or leave it on **All Employees**.
 - **Usage Status** - **Available**, **Used**, **Expired**, or **All Usage**.
 - **From Date** / **To Date** - limit by the date the extra work was done.
3. Use the **Search compensatory offs...** box to find requests.
4. To act on a **Pending** request, click the approve (check) or reject (X) button in the **Actions** column, or open the request first with the eye icon.
5. To approve: optionally add **Notes (optional)**, then click **Approve**.
6. To reject: enter a **Reason** (required), then click **Reject**.
7. The trash icon deletes a request (with a confirmation).

What you'll see

- **Statistics cards** at the top: **Total Earned**, **Available**, **Used**, **Expired**, and **Pending**.
- A **Comp-Off Earned Per Month (Last 12 Months)** bar chart.
- The table, with columns: **ID**, **Employee**, **Worked Date**, **Hours**, **Days**, **Expiry Date**, **Status** (Pending / Approved / Rejected), **Usage** (Available / Used / Expired, or "-"), and **Actions**.

Opening one request

The eye icon opens **Compensatory Off #** with: a **Request Details** card (status and usage badges, **Worked Date**, **Hours Worked**, **Comp Off Days**, **Expiry Date**, **Reason**, and a "used on" note if it's already been used for a leave request); a **Timeline** card (created, approved/rejected); and an **Employee** card. **Approve**, **Reject**, **Edit**, and **Delete** buttons appear at the top depending on status and your permissions.

Creating or editing a comp-off request

The **Request Compensatory Off** form (and the edit form) capture the **Worked Date**, **Hours Worked**, an auto-calculated **Comp Off Days** (every 4 hours = 0.5 day), and a **Reason**. These are normally used by employees from self-service; admins with the right permission can also edit a pending request from its detail page.

Tips

- Only **Pending** comp-off requests can be approved or rejected.
- An approved comp-off has an expiry date; once it's past, its usage status shows **Expired**.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Employee leave calendar

The Employee Leave Calendar shows who is off on which days, in a month grid, so you can spot clashes before approving leave. It opens at `/leaves/team` - reach it from the leave area of the workspace.

1. **Leave Management** - Open the **Leave Management** group in the menu.
2. **All Leave Requests** - Then choose **All Leave Requests**.

Steps

1. Open the **Employee Leave Calendar**.
2. Use the filters to focus the view:
 - **Status** - **Approved**, **Pending**, or **All Statuses**.
 - **Leave Type** - pick a type, or leave it on **All Leave Types**.
 - The employee picker - pick one employee, or leave it on **All Members**.
3. Use the < and > arrows above the grid to move between months, or click **Today** to jump back to the current month.
4. Click an employee's name inside a day cell to open a **Leave Details** pop-up for that request.

What you'll see

- **Stats cards** at the top: **Employees**, **On Leave Today**, **Pending Requests**, and **Total This Month**.
- A **Leaves in [month]** row of badges showing how many leaves of each type fall in the displayed month, each with the leave type's colour dot.
- An **On Leave Today** panel (when anyone is) listing each person off today with their leave type, the date range, and the day count.
- A **Leave Statistics** card with **This Month**, **Employee Count**, and **Avg. Leave/Person**.
- The **month grid**: each day cell shows the people on leave that day as small avatars with the leave type's colour dot. If more than three people are off, it shows "+N more". Hovering a day shows a tooltip listing everyone off with a status badge.
- The **Leave Details** pop-up (opened from a name) shows the employee name, leave type, duration with day count, status, and reason.

Tips

- Half-day leaves are marked with "1st Half" or "2nd Half" next to the leave type in the On Leave Today panel.
- The employees shown depend on your role and reporting relationships.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view approvals. Availability depends on your company's configuration.

Approval inbox

The approval inbox is your single queue for everything waiting on your decision - leave requests, expense claims, loans, warnings, promotions, separations, and other requests the system has routed to you. It only shows the items that are currently your turn to act on.

1. **Approvals** - Open the **Approvals** group in the menu.
2. **Inbox** - Then choose **Inbox**.

Steps

1. Open **Approvals** → **Inbox** from the left menu.
2. The page is titled **Pending Approvals** and lists the requests awaiting your action.
3. Use the **Search approvals...** box to narrow the list, and the column headers to sort.
4. Open a request with the view (eye) button in the **Actions** column, then approve or reject it - see [Approving and rejecting a request](#).

What you'll see

Each row is one pending step of a request:

- **Workflow** - the approval flow the request is going through (for example, "Leave Approval").
- **Step** - the name of the step that's yours to act on. If the flow has more than one level, a small badge shows the progress, like "1/2", so you know another level may follow.
- **Subject** - a short summary of the request, when one is available.
- **Requested By** - the employee who raised the request.
- **Request Type** - what kind of request it is (Leave Request, Expense Request, Loan, Warning, Promotion, Separation, and so on).
- **Assigned To** - the approver line-up. Each level (L1, L2, ...) is listed with the person assigned; the level that's currently active is highlighted and marked "This row". Levels that have already approved, rejected, or been skipped appear dimmed.
- **Request Date** - when the request was submitted.
- **Actions** - buttons to view the request, approve it, or reject it.

Finding a request

The **Search approvals...** box above the table filters by requester name or code, workflow name, step name, or request type. You can also sort by the **Workflow** and **Request Date** columns.

Tips

- A request only appears once it reaches your level. Earlier levels finish first, then the request shows up in your inbox.
- After you approve a multi-level request, the next level's reviewer sees it in their inbox. If you also happen to be the next approver, the row reappears for you when the list refreshes.

- The view (eye) button is only shown for request types that have a detail page in Open Core HR. For other types, decide from the information shown in the row.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view approvals. Availability depends on your company's configuration.

Approving and rejecting a request

From the approval inbox you can approve a request so it moves to the next level (or completes), or reject it so it goes back to the requester. Both actions let you add notes.

1. **Approvals** - Open the **Approvals** group in the menu.
2. **Inbox** - Then choose **Inbox**.

Steps

1. Open **Approvals** → **Inbox** from the left menu.
2. Find the request you want to act on. To review the full details first, click the view (eye) button in the **Actions** column.
3. To approve it, click the green check button in the **Actions** column.
 - In the **Approve Request** dialog, optionally type your **Remarks**.
 - Click **Approve**.
4. To reject it, click the red cross button in the **Actions** column.
 - In the **Reject Request** dialog, type a **Notes** value - this is required; you must give a reason.
 - Click **Reject**.

What you'll see

- When you approve a step in a multi-level flow, a message confirms the approval and tells you which step comes next.
- When you reject a request, it leaves your inbox and the requester is informed of the outcome.
- Either way, the list refreshes and the row disappears once it's no longer yours to act on.

Troubleshooting

- **The reject button does nothing.** A reason is mandatory - enter text in the **Notes** field, then click **Reject**.
- **You see an error that the request is already finalised.** Someone else, or another level, has already completed it. The list refreshes and the stale row clears.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · reassign approvals. Availability depends on your company's configuration.

Reassigning an approval

Sometimes an approval needs to move to a different person – for example, when the configured approver role has nobody assigned to it and the request is stuck.

1. **Approvals** – Open the **Approvals** group in the menu.
2. **Inbox** – Then choose **Inbox**.

What you can do today

The **Approvals → Inbox** screen does not have a button to hand an approval to a specific person. What it does instead, for HR admins and admins, is surface the stuck requests so they can be acted on:

1. Open **Approvals → Inbox** from the left menu.
2. If a request's approval level couldn't be matched to anyone (for example, the workflow points to a role that no one currently holds), it still appears in the inbox for HR admins and admins.
3. From there you can approve or reject it directly – see [Approving and rejecting a request](#) – so the request doesn't stall.

To change who normally approves a given type of request, edit the relevant flow on the **Approvals → Workflows** page – see [Approval workflows](#).

Note

The Approvals inbox offers view, approve and reject. There is no per-row reassign control on this screen, even though a "reassign approvals" permission exists.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage approval workflows. Availability depends on your company's configuration.

Approval workflows

A workflow decides who reviews a particular kind of request and in what order. There's one workflow per request type - leave, expenses, loans, warnings, promotions, separations, and so on - and each workflow is a list of approval levels. On this page you adjust the levels of an existing workflow.

1. **Approvals** - Open the **Approvals** group in the menu.
2. **Workflows** - Then choose **Workflows**.

Opening the page

Open **Approvals** → **Workflows** from the left menu. The page is titled **Approval Workflows**.

Workflows are grouped by area (for example, Leave, Expenses, Loans, Disciplinary, Lifecycle). Each workflow shows as a card with:

- Its **name** and a short code.
- An **Active** or **Inactive** badge.
- A badge with the number of steps.
- A compact pipeline of step names so you can scan the flow at a glance.

Click the chevron on a card to expand it and see each level in full, with the level number, the step name, and the approver type.

Editing a workflow's steps

You need the workflow management permission for this. If you don't, the edit button isn't shown.

1. On the **Approval Workflows** page, find the workflow you want to change.
2. Click the pencil (edit) button on its card. The **Edit Workflow** panel slides in from the right.
3. Update the details as needed:
 - **Name** - the display name of the workflow.
 - **Code** - fixed once the workflow exists; it can't be changed here.
 - **Description** - optional explanatory text.
 - **Active** - turn the workflow on or off. While it's off, requests of that type can't be submitted through it.
4. Adjust the **Approval Levels**:
 - Each level has a **Step Name** (for example, "HR Manager Approval") and an **Approver Type**. The approver type currently offered is **Role**, with a **Role** picker to choose which role approves at that level.
 - Use the up and down arrows on a level to reorder it.
 - Use **Add Level** to add another level, or the delete (trash) button to remove one. A workflow must keep at least one level.
5. Click **Update** to save.

What you'll see

- The card refreshes with the new step pipeline and step count.
- Requests submitted from now on follow the updated levels. In-progress requests continue on the flow they started.

Tips

- There's no "Add Workflow" button - the set of workflows matches the request types Open Core HR supports, so you edit the steps of the existing ones rather than creating new flows.
- A workflow that's set to **Inactive** blocks new submissions of that request type. If issuing a warning or submitting a request is being refused, check that the matching workflow is active.

Note

The workflow editor offers **Role** as the approver type. Other approver types exist in the system but are not selectable on this screen.

Requires DisciplinaryActions module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view warnings. Availability depends on your company's configuration.

Warnings

The Warnings screen lists every disciplinary warning in the system. From here you can filter and search the list, open a warning's details, work on drafts, and start the process of issuing a new warning.

1. **Disciplinary Actions** - Open the **Disciplinary Actions** group in the menu.
2. **Warnings** - Then choose **Warnings**.

Steps

1. Open **Disciplinary Actions** → **Warnings** from the left menu. The page is titled **Warnings**.
2. Use the toolbar above the table to narrow the list (see below).
3. Click the view (eye) button on a row to open [a warning's details](#).
4. To raise a new one, click **Issue Warning** - see [Issuing a warning](#).

Filtering and searching

The toolbar above the table has:

- An **All Employees** picker to show warnings for one employee.
- An **All Types** dropdown to filter by warning type.
- An **All Statuses** dropdown with: **Issued**, **Acknowledged**, **Appealed**, **Appeal Approved**, **Appeal Rejected**, **Withdrawn**, **Expired**.
- A **Search warnings...** box that matches the warning number, the reason text, the employee's name or code, and the warning type name.

You can also sort by the **Warning No.**, **Issue Date**, and **Status** columns.

What you'll see

Each row shows:

- **Employee** - who the warning was issued to.
- **Warning No.** - the warning's reference number.
- **Type** - the warning type.
- **Severity** - Low, Medium, High, or Critical, shown as a coloured badge (inherited from the warning type).
- **Issue Date** - when it was issued.
- **Expires** - the expiry date, if one was set.
- **Status** - the current status badge (Draft, Pending Approval, Issued, Acknowledged, Appealed, Appeal Approved, Appeal Rejected, Withdrawn, or Expired).
- **Actions** - the view (eye) button on every row. For warnings still in **Draft** status, and if you have the edit permission, you'll also see an edit (pencil) button and a submit (send) button to push the draft into the approval workflow.

Tips

- A warning isn't issued until it has gone through its approval workflow. New warnings start as a draft, then get submitted for approval - see [Issuing a warning](#).
- Use the status filter to see what's awaiting approval (filter on **Issued**) versus what employees have already acknowledged (**Acknowledged**).

Requires DisciplinaryActions module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · issue warnings. Availability depends on your company's configuration.

Issuing a warning

Use this to record a disciplinary warning for an employee. A warning is first created as a draft, then submitted for approval - once the approval workflow finishes, it's officially issued and the employee is notified.

1. **Disciplinary Actions** - Open the **Disciplinary Actions** group in the menu.
2. **Warnings** - Then choose **Warnings**.
3. **Issue Warning** - Click **Issue Warning** at the top right.
4. **Employee** - The person the warning is for. Required.
5. **Warning Type** - Pick from the configured types. The severity is shown next to its name. Required.
6. **Issue Date** - The date of the warning. Required.
7. **Reason** - The reason for the warning. Required.
8. **Expiry Date** - (Optional) Date after which the warning lapses.
9. **Incident Details** - (Optional) Describe what happened in more detail.
10. **Save as Draft** - Saves the warning as a **Draft** - not yet issued.
11. **Submit for Approval** - On a **Draft** row, click the **submit** (send) button to run it through the approval workflow.
12. **Edit Draft** - Or click the **edit** (pencil) on a **Draft** row to open the **Edit Draft Warning** panel.
13. **Submit for Approval** - Send the draft into the approval workflow now.

Steps

1. Open **Disciplinary Actions** → **Warnings** from the left menu. (You can also use **Issue Warning** from the quick-create menu.)
2. Click **Issue Warning**. The **Issue Warning** panel slides in from the right.
3. Fill in the form:
 - **Employee** - the person the warning is for. Required.
 - **Warning Type** - pick from the configured types; the type's severity is shown next to its name. Required.
 - **Issue Date** - the date of the warning. Required.
 - **Expiry Date** - optional date after which the warning lapses.
 - **Reason** - the reason for the warning. Required.
 - **Incident Details** - optional space to describe what happened in more detail.
4. Click **Save as Draft**. The warning is saved with **Draft** status; it isn't issued yet.
5. To put it forward for approval, find the draft in the warnings list and click the submit (send) button on its row - or open the draft for editing and click **Submit for Approval**. This runs it through the configured approval workflow.

What you'll see

- After saving, you're returned to the **Warnings** list with the new draft showing.
- A panel note reminds you that issuing the warning runs it through the configured approval workflow, and that saving as a draft holds it until you're ready.
- Once submitted, the status moves through approval; when the workflow approves it, the warning becomes **Issued** and the employee is notified.

Editing a draft

1. On the **Warnings** list, find a row with **Draft** status and click the edit (pencil) button.
2. Update the fields in the **Edit Draft Warning** panel.
3. Click **Save as Draft** to keep editing later, or **Submit for Approval** to send it into the workflow now.

Troubleshooting

- **Submitting for approval is refused.** The approval workflow for warnings may be turned off. An admin can check it on **Approvals → Workflows** - see [Approval workflows](#).
- **You don't see the Issue Warning button.** You need the permission to issue warnings.

Requires **DisciplinaryActions** module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · issue warnings. Availability depends on your company's configuration.

Issuing warnings to several employees at once

There may be times when the same warning needs to go to a group of employees - for example, after a shared policy breach.

1. **Disciplinary Actions** - Open the **Disciplinary Actions** group in the menu.
2. **Warnings** - Then choose **Warnings**.

What you can do today

The **Disciplinary Actions** → **Warnings** screen does not currently have a bulk-issue option. The **Issue Warning** form handles one employee at a time. To warn several people, repeat the steps in [Issuing a warning](#) for each employee.

Note

The Warnings screen offers the single-employee **Issue Warning** form only. There is no multi-select or bulk-issue control, even though the back end supports issuing in bulk.

Requires **DisciplinaryActions** module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view warnings. Availability depends on your company's configuration.

A warning's details

The warning detail page shows the full record of a single warning - what it was for, who issued it, whether the employee has acknowledged it, and any appeals that have been raised against it.

1. **Disciplinary Actions** - Open the **Disciplinary Actions** group in the menu.
2. **Warnings** - Then choose **Warnings**.

Steps

1. Open **Disciplinary Actions** → **Warnings** from the left menu.
2. Click the view (eye) button on the warning you want to open.
3. Use the back arrow at the top to return to the warnings list.

What you'll see

The page header shows the warning number and its current status badge.

Warning Summary

- **Type** - the warning type, with its severity badge.
- **Issue Date** - when it was issued.
- **Expires** - the expiry date, if one was set.
- **Issued By** - who issued it.
- **Reason** - the reason recorded.
- **Incident Details** - the longer description, if one was entered.
- **Acknowledged** - if the employee has acknowledged the warning, this block shows who acknowledged it and when, along with any comments the employee added.

Appeal History

- If no appeal has been filed, this section says so.
- Otherwise it lists each appeal with its number, status badge, submission date, the appeal reason, and - once decided - the resolution notes, the outcome, and who reviewed it and when.

Employee - the employee's name and code.

Letter - a **Download Warning Letter** button to download the warning letter document.

Tips

- Use the **Appeal History** section to track whether an appeal is still pending or has been resolved. To act on appeals, go to [Appeals](#).

Requires **DisciplinaryActions** module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage warning types. Availability depends on your company's configuration.

Warning types

Warning types are the categories you choose from when issuing a warning - for example, "Verbal Warning" or "Written Warning". Each type sets a severity, how long an employee has to appeal, and whether the employee must acknowledge the warning.

1. **Disciplinary Actions** - Open the **Disciplinary Actions** group in the menu.
2. **Warning Types** - Then choose **Warning Types**.
3. **New Type** - Click **New Type** at the top right.
4. **Name** - Required. The warning type name (e.g. **Verbal Warning**).
5. **Severity** - Pick the severity level.
6. **Description** - (Optional) What this warning type is for.
7. **Create** - Save the warning type.
8. **Edit** - Click the **edit** (pencil) button to open **Edit Warning Type**.
9. **Delete** - Click the **delete** (trash) button on the row.
10. **Delete** - Confirm in the **Delete Warning Type?** dialog.

Opening the page

Open **Disciplinary Actions** → **Warning Types** from the left menu. The page is titled **Warning Types**.

The table shows:

- **Name** - the type's name.
- **Severity** - Low, Medium, High, or Critical, shown as a coloured badge.
- **Appeal Deadline (days)** - how many days the employee has to appeal a warning of this type.
- **Requires Ack.** - Yes or No, whether the employee must acknowledge the warning.
- **Status** - Active or Inactive.
- **Actions** - edit and delete buttons (shown if you have the permission to manage warning types).

You can search with the **Search warning types...** box, and sort by **Name**, **Severity**, and **Appeal Deadline (days)**.

Adding a warning type

1. On the **Warning Types** page, click **New Type**. The **New Warning Type** panel slides in from the right.
2. Fill in the form:
 - **Name** - required (for example, "Verbal Warning").
 - **Description** - optional.
 - **Severity** - Low, Medium, High, or Critical. Required.

- **Appeal Deadline (days)** - the appeal window in days (0-365).
- **Requires employee acknowledgment** - tick this if employees must acknowledge warnings of this type.
- **Active** - tick to make the type available when issuing warnings.

3. Click **Create**.

Editing a warning type

1. Click the edit (pencil) button on the row.
2. Update the fields in the **Edit Warning Type** panel.
3. Click **Update**.

Deleting a warning type

1. Click the delete (trash) button on the row.
2. Confirm in the **Delete Warning Type?** dialog by clicking **Delete**.

A type that's already used by existing warnings can't be deleted. If you no longer want it offered, set it to **Inactive** instead.

Tips

- The severity you set on the type is the severity that appears on every warning of that type.
- Only **Active** types appear in the warning type picker when issuing a warning.

Requires DisciplinaryActions module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view appeals. Availability depends on your company's configuration.

Appeals

When an employee disagrees with a warning, they can appeal it. The Appeals screen lists every appeal so you can review the employee's case and decide the outcome.

1. **Disciplinary Actions** - Open the **Disciplinary Actions** group in the menu.
2. **Appeals** - Then choose **Appeals**.

Steps

1. Open **Disciplinary Actions** → **Appeals** from the left menu. The page is titled **Warning Appeals**.
2. Use the status filter and search box to find an appeal.
3. Click the view (eye) button to see the appeal's details, or **Review** to decide it - see [Reviewing an appeal](#).

Filtering and searching

- An **All Statuses** dropdown with: **Pending**, **Under Review**, **Approved**, **Rejected**, **Withdrawn**.
- A **Search appeals...** box that matches the appeal reason, the employee's name or code, the warning number, and the warning type name.

You can sort by **Appeal No.**, **Submitted**, and **Status**.

What you'll see

Each row shows:

- **Employee** - the employee who filed the appeal.
- **Appeal No.** - the appeal's reference number.
- **Warning No.** - the warning being appealed.
- **Warning Type** - the type of that warning.
- **Submitted** - when the appeal was filed.
- **Status** - Pending, Under Review, Approved, Rejected, or Withdrawn.
- **Actions** - the view (eye) button on every row, plus a **Review** button on appeals that are **Pending** or **Under Review** (shown if you have the permission to review appeals).

Tips

- Appeals you can still act on are in **Pending** or **Under Review** status. Once an appeal is **Approved** or **Rejected**, the view button shows the recorded resolution but you can't change it.
- Filter on **Pending** to see appeals that haven't been looked at yet.

Requires **DisciplinaryActions** module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · decide appeals. Availability depends on your company's configuration.

Reviewing an appeal

When an employee appeals a warning, you review their case and record a decision - approve the appeal (and choose what happens to the warning) or reject it. Your decision updates the warning's status and notifies the employee.

1. **Disciplinary Actions** - Open the **Disciplinary Actions** group in the menu.
2. **Appeals** - Then choose **Appeals**.
3. **Review** - On a row that is **Pending** or **Under Review**, click **Review** (or the view (eye) button). The **Review Appeal** panel opens.
4. **Review panel** - The panel shows the **Appeal Reason**, the **Employee Statement**, and any **Supporting Documents** attached.
5. **Decision** - **Approve Appeal** (uphold the employee's appeal) or **Reject Appeal** (the warning stands).
6. **Outcome** - **Upheld**, **Reduced** (then pick a lower-severity **New Warning Type**), or **Dismissed**.
7. **Resolution Notes** - Required. Explain your decision.
8. **Submit Review** - Save the review - the appeal status changes, the warning updates accordingly, and the employee is notified.

Steps

1. Open **Disciplinary Actions** → **Appeals** from the left menu.
2. Find an appeal that's **Pending** or **Under Review** and click **Review** (or the view (eye) button). The **Review Appeal** panel slides in from the right.
3. Read the employee's case - the panel shows the **Appeal Reason**, the **Employee Statement** if one was given, and any **Supporting Documents** they attached.
4. Choose a **Decision**:
 - **Approve Appeal** - you're upholding the employee's appeal.
 - **Reject Appeal** - the warning stands.
5. If you chose **Approve Appeal**, pick an **Outcome**:
 - **Upheld** - the appeal is upheld.
 - **Reduced** - the warning is reduced. Choosing this reveals a **New Warning Type** picker; select the lower-severity warning type to move the warning to. This is required.
 - **Dismissed** - the warning is dismissed.
6. Enter **Resolution Notes** explaining your decision. This is required.
7. Click **Submit Review**.

What you'll see

- The appeal's status changes to **Approved** or **Rejected**, with the outcome and your notes recorded against it.

- The warning's status updates accordingly - **Appeal Approved** or **Appeal Rejected** - and if you chose the **Reduced** outcome, the warning is switched to the new warning type you picked.
- The employee is notified of the resolution.
- The recorded resolution then shows on the appeal's details (via the view button) and in the warning's **Appeal History** - see [A warning's details](#).

Troubleshooting

- **There's no Review button on the appeal.** You can only review appeals that are **Pending** or **Under Review**, and you need the permission to review appeals.
- **Submit Review won't go through.** Resolution notes are mandatory, and if the outcome is **Reduced** you must also pick a new warning type.

Note

The Appeals screen goes straight from the list to the Review panel. There is no step for assigning an appeal to a specific reviewer before deciding it.

Requires HRPolicies module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view policies. Availability depends on your company's configuration.

HR policies

The **All Policies** page lists every HR policy in your organization, with its category, status, version and acknowledgment progress. Open it from **HR Policies > All Policies** in the left menu.

1. **HR Policies** - Open the **HR Policies** group in the menu.
2. **All Policies** - Then choose **All Policies**.

Steps

1. In the left menu, choose **HR Policies > All Policies**.
2. Use the **Search policies...** box to find a policy by title or description.
3. Use the **All Categories** dropdown to show only policies in one category, and the **All Statuses** dropdown to show only one status.
4. Click the **Title**, **Category**, **Status**, **Effective Date** or **Version** column headers to sort.
5. Use the icons in the **Actions** column to view, edit or delete a policy.
6. To create a new policy, click **Add Policy**. See [Creating and versioning a policy](#).

What you'll see

The table has these columns:

- **Title** - the policy name.
- **Category** - a coloured badge for the policy's category.
- **Status** - a coloured badge:
 - **Draft** - being written; not yet submitted for approval.
 - **Pending Approval** - submitted and waiting for a super admin to approve.
 - **Active** - approved and published.
 - **Rejected** - turned down during approval; needs revising and resubmitting.
 - **Inactive** - not currently in force.
 - **Archived** - retired.
- **Effective Date** - the date the policy takes effect.
- **Version** - the policy's version number (for example 1.0, 2.0).
- **Mandatory** - a tick when the policy is marked mandatory.
- **Ack** - acknowledgment progress, shown as acknowledged out of total assigned.
- **Actions** - view the policy details; edit it; or delete it.

Tips

- Each policy goes through an approval step before it is published. See [Creating and versioning a policy](#).
- To set up the categories that appear in the **Category** dropdown, see [Policy categories](#).
- To track who has read each policy, see [Policy acknowledgments](#).

Requires HRPolicies module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · create policies. Availability depends on your company's configuration.

Creating and versioning a policy

You write a policy as a draft, submit it for approval, and once a super admin approves it, it is published. When a published policy needs changes, you create a new version rather than editing the live one.

1. **HR Policies** - Open the **HR Policies** group in the menu.
2. **All Policies** - Then choose **All Policies**.
3. **Add Policy** - Click **Add Policy** at the top right.
4. **Title** - Required. The policy name.
5. **Category** - Required. See **HR Policies → Categories**.
6. **Content** - Required. Write the policy body in the editor.
7. **Description** - (Optional) A short summary.
8. **Effective Date** - (Optional) When the policy takes effect.
9. **Is Mandatory** - Turn on if employees must accept this policy.
10. **Requires Acknowledgment** - On by default - assigned employees must confirm they've read it.
11. **Save as Draft** - Creates the policy with status **Draft** and takes you to its edit page.
12. **Submit for Approval** - Review the content, then click **Submit for Approval**. The status becomes **Pending Approval** until a super admin reviews it.
13. **Create New Version** - On an **Active** policy, click **Create New Version**. A new draft is created with the next major version (for example 2.0), linked to this one as its parent.

Creating a policy

1. In the left menu, choose **HR Policies > All Policies**.
2. Click **Add Policy**.
3. Fill in the form:
 - **Title** - the policy name (required).
 - **Description** - a short summary (optional).
 - **Category** - the policy category (required). See [Policy categories](#).
 - **Version** - fixed at 1.0 for a new policy; you can't change it here.
 - **Effective Date, Review Date, Expiry Date** - optional dates.
 - **Content** - the body of the policy, written in the rich-text editor (required).
 - **Is Mandatory** - turn on if employees must accept this policy.
 - **Requires Acknowledgment** - turn on if assigned employees must confirm they've read it (on by default).
 - **Auto-assign New Employees** - turn on to assign this policy automatically to new employees.
 - **Acknowledgment Deadline (days)** - how many days an employee has to acknowledge after the policy is assigned (shown only when **Requires Acknowledgment** is on; defaults to 30).

4. Click **Save as Draft**. The policy is created with the status **Draft** and you're taken to its edit page.

Submitting for approval

1. Open the policy's edit page (the pencil icon on **All Policies**, or open it after saving a draft).
2. Review the content and click **Submit for Approval**.
3. Confirm in the dialog. Your latest changes are saved and the policy is submitted to a super admin for review. Its status becomes **Pending Approval** and it can't be edited until the review is finished.
4. If it is approved, its status becomes **Active** (published). If it is rejected, its status becomes **Rejected** - open it again, make your changes, and click **Resubmit for Approval**.

Editing

- A **Draft** or **Rejected** policy can be edited freely; save with **Save Draft** / **Save Changes**.
- A **Pending Approval**, **Active** or **Archived** policy can't be edited. To change a published (**Active**) policy, create a new version.

Creating a new version

1. Open the **Active** policy's edit page.
2. Click **Create New Version**.
3. A new policy is created as a **Draft**, copying the title, content, category and settings, with the next major version number (for example version 2.0 from version 1.0) and no effective or expiry date set. It is linked to the original as its parent.
4. Edit the new version, then submit it for approval as above. Once it's approved, it becomes the live version.

Tips

- New policies always start as drafts - saving doesn't publish anything.
- A policy must be **Active** before it can be assigned to employees. See [Assigning a policy to employees](#).

Requires HRPolicies module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view policies. Availability depends on your company's configuration.

A policy's details

The policy details page shows the full text of a policy, its version and status, who has been assigned it, and how acknowledgment is progressing. Open it from the eye icon on the **All Policies** page.

1. **HR Policies** - Open the **HR Policies** group in the menu.
2. **All Policies** - Then choose **All Policies**.

Steps

1. In the left menu, choose **HR Policies > All Policies**.
2. Find the policy and click the eye icon in the **Actions** column.

What you'll see

Header - the policy title, with badges and details:

- the **Category** badge,
- a status badge (**Draft**, **Pending Approval**, **Active**, **Rejected**, **Inactive** or **Archived**),
- the version (for example v1.0),
- the **Effective** date, if set,
- a **Mandatory** badge, if the policy is mandatory,
- a note if this version was derived from an earlier one.

If the policy is **Pending Approval**, a banner notes it's waiting for a super admin to approve it before it can be published.

Action buttons (top right):

- **Edit** - opens the edit page. See [Creating and versioning a policy](#).
- **Assign Policy** - assign the policy to employees. See [Assigning a policy to employees](#).

Policy Content - the full body of the policy, formatted.

Acknowledgment summary - four tiles:

- **Total** - employees the policy is assigned to.
- **Acknowledged** - how many have confirmed they've read it.
- **Pending** - how many still need to acknowledge.
- **Overdue** - how many have passed their deadline without acknowledging.

Acknowledgments - a table of everyone assigned this policy, showing the **Employee**, the policy **Version** they were assigned, their **Status** (Pending, Acknowledged, Overdue or Expired), and the **Assigned**, **Deadline** and **Acknowledged** dates. Use the **Search acknowledgments...** box to filter it.

Tips

- For acknowledgment tracking across all policies in one place, use [Policy acknowledgments](#).
- There is no export button on this page. The HR Policy Manual PDF, which covers all active policies, is generated from the policies list rather than from a single policy.

Requires HRPolicies module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage policy categories. Availability depends on your company's configuration.

Policy categories

Categories group your HR policies - for example "Code of Conduct", "Leave", "IT & Security". Every policy belongs to one category. Open this screen from **HR Policies > Categories** in the left menu.

1. **HR Policies** - Open the **HR Policies** group in the menu.
2. **Categories** - Then choose **Categories**.

Steps

1. In the left menu, choose **HR Policies > Categories**.
2. Use the **Search categories...** box to find a category by name or description.
3. To add a category, click **Add Category**.
4. To change one, click the pencil icon in the **Actions** column. To remove one, click the trash icon.

Adding or editing a category

In the **Add Category / Edit Category** panel that slides in from the right:

- **Name** - the category name (required).
- **Description** - an optional note about what the category covers.
- **Color** - pick a colour; it's used for the category badge throughout HR Policies.
- **Icon** - an optional icon name.
- **Sort Order** - a number controlling where the category appears in lists (lower numbers first).

Click **Create** (or **Update**) to save.

What you'll see

The categories table has these columns:

- **Color** - a coloured dot for the category.
- **Name** - the category name.
- **Description** - a short description (trimmed if long).
- **Policies** - how many policies are in this category.
- **Sort Order** - the ordering number.
- **Actions** - edit or delete the category.

Troubleshooting

- **Can't delete a category** - categories that still have policies in them can't be deleted. Move or remove those policies first, then delete the category.

Requires HRPolicies module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage policy acknowledgments. Availability depends on your company's configuration.

Assigning a policy to employees

Assigning a policy gives the selected employees a record to acknowledge it. You can assign it to specific people or to everyone. Only published (**Active**) policies can be assigned.

1. **HR Policies** - Open the **HR Policies** group in the menu.
2. **All Policies** - Then choose **All Policies**.
3. **View** - Open the policy by clicking the **eye** icon in the **Actions** column.
4. **Assign Policy** - Click **Assign Policy** at the top right - the panel slides in.
5. **Audience** - Pick who gets the policy - turn on **Send to All** for every active employee, or off to pick specific employees.
6. **Assignment Note** - (Optional) A note shown to the assigned employees.
7. **Assign** - Save - the policy is assigned. Employees see it in their **HR Policies** list and are asked to acknowledge it.

Steps

1. In the left menu, choose **HR Policies > All Policies**.
2. Open the policy by clicking the eye icon in the **Actions** column.
3. Click **Assign Policy** at the top right. The **Assign Policy** panel slides in from the right.
4. Choose who gets the policy:
 - Tick **Send to All Employees** to assign it to every active employee, or
 - Leave that unticked and pick people one at a time: click **Add Employee**, choose an employee from the picker, and repeat. Use **Remove** to drop a row.
5. Optionally add an **Assignment Note** for the employees.
6. Click **Assign**.

What happens next

- Each selected employee gets an acknowledgment record for the current version of the policy, set to **Pending**.
- If the policy has an acknowledgment deadline, it is applied from the assignment date.
- Anyone already assigned the current version is skipped, so re-running the assignment won't create duplicates.
- The acknowledgment summary on the policy details page updates with the new totals.

Tips

- Track progress in the **Acknowledgments** table on the policy details page, or across all policies in [Policy acknowledgments](#).
- A policy with **Auto-assign New Employees** turned on is also assigned automatically to new joiners - see [Creating and versioning a policy](#).

Troubleshooting

- **No "Assign Policy" button, or assigning fails** - the policy must be **Active** (published). A draft, pending, rejected or archived policy can't be assigned. Get it approved first.
- Assignment targets either everyone or named individuals. There are no role, department or location filters, and no per-assignment deadline - the policy's own acknowledgment deadline applies.

Requires HRPolicies module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage policy acknowledgments. Availability depends on your company's configuration.

Policy acknowledgments

The **Acknowledgments** page tracks who has - and hasn't - confirmed they've read each policy, across every policy in one place. Open it from **HR Policies > Acknowledgments** in the left menu.

1. **HR Policies** - Open the **HR Policies** group in the menu.
2. **Acknowledgments** - Then choose **Acknowledgments**.

Steps

1. In the left menu, choose **HR Policies > Acknowledgments**.
2. Use the **All Policies** dropdown to focus on one policy, and the **All Statuses** dropdown to show only one status.
3. Use the **Search acknowledgments...** box to find a row by employee name or code, policy title or category.
4. Click a column header to sort.
5. Click the eye icon in the **Actions** column to open the full detail for a row.

What you'll see

The table has these columns:

- **Employee** - the assigned person (avatar, name and code).
- **Policy** - the policy title.
- **Version** - the policy version the employee was assigned.
- **Status** - a coloured badge:
 - **Pending** - assigned, not yet acknowledged.
 - **Acknowledged** - the employee has confirmed reading it.
 - **Overdue** - the deadline passed without acknowledgment.
 - **Expired** - the assignment is no longer current (for example a newer version exists).
- **Assigned** - when the policy was assigned.
- **Deadline** - when the acknowledgment is due, if a deadline applies.
- **Acknowledged** - when the employee acknowledged it.
- **Actions** - open the acknowledgment detail.

The detail panel

Clicking the eye icon opens a slide-over showing the **Employee**, **Policy**, **Version** and **Status**, the **Assigned**, **Deadline** and **Acknowledged** dates, the **Assignment Note** (if one was given), and the employee's **Comments** (if any).

Tips

- For the acknowledgment totals and list for a single policy - Total, Acknowledged, Pending and Overdue counts - open that policy from **All Policies** and look at its details page. See [A policy's details](#).

- To create new acknowledgment records, assign the policy to the relevant employees. See [Assigning a policy to employees](#).

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view employee timeline · view offer letters · view promotions. Availability depends on your company's configuration.

Employee lifecycle

The Employee Lifecycle area is where HR manages an employee's journey from the first offer to their final settlement on exit. It has its own group in the left menu.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

What's in this area

The **Employee Lifecycle** submenu has these screens:

- **Offers** - offer letters for candidates, plus reviewing each new joiner's onboarding submissions and completing onboarding.
- **Appointments** - appointment (confirmation-of-employment) letters issued to confirmed joiners.
- **Probations** - probation periods, with options to extend a probation or confirm an employee as permanent.
- **Promotions** - designation changes, salary increments, or both, routed through an approval workflow.
- **Bonus Cycles** - bonus processing cycles and the bonus entries generated for them.
- **Warning Letters** - performance warning letters (for target misses and similar), separate from disciplinary warnings.
- **Separations** - the exit process when an employee resigns or is relieved.
- **NDC** - no-dues clearances that each department signs off before an exit is finalised.
- **Settlements** - the full and final settlement amounts for separating employees.

Many of these steps also produce letters - offer letters, appointment letters, increment letters, warning letters, and relieving letters - which can be previewed and downloaded from the related screen.

How the pieces fit together

1. HR creates an **offer** and sends it to a candidate.
2. The candidate accepts and fills in their details and documents online; HR **reviews** each section and **completes onboarding**, which activates the employee account and issues the **appointment letter**.
3. A **probation** review is created for the new joiner. When the probation ends, HR extends it or confirms the employee.
4. Over time, HR records **promotions** and runs **bonus cycles**, and issues **warning letters** where needed.
5. When an employee leaves, HR records a **separation**, departments complete the **no-dues clearances**, and HR prepares the **final settlement** and marks it paid.

The pages in this section walk through each of these steps.

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view offer letters. Availability depends on your company's configuration.

Offer letters

The **Offers** screen lists every offer letter your team has created for a candidate. An offer captures the role, salary, joining date and terms you're proposing to someone before they join.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Steps

1. In the left menu, open **Employee Lifecycle** and choose **Offers**.
2. Use the search box or the **All Statuses** filter at the top of the list to narrow it down.
3. Click a row's action button to **Edit**, **Send**, **Resend**, **Revoke**, **View** or **Review** that offer, depending on its status.

What you'll see

Each offer row shows:

- **Ref Number** - the offer's reference number.
- **Candidate Name** - the candidate's full name.
- **Email** - the candidate's email address.
- **Designation** - the role being offered.
- **Department** - the department for that role.
- **Salary** - the offered salary.
- **Joining Date** - the proposed start date.
- **Status** - where the offer is in its lifecycle.
- **Actions** - buttons available for that offer.

Statuses

- **Draft** - created but not yet sent to the candidate.
- **Sent** - sent to the candidate, waiting for them to accept.
- **Confirmed** - the candidate has accepted; awaiting their onboarding submissions.
- **Pending HR Review** - the candidate has submitted their onboarding details and documents for HR to review.
- **Revision Requested** - HR has sent the submission back to the candidate for corrections.
- **Onboarded** - onboarding is complete and the employee account is active.
- **Lapsed** - the offer was not accepted in time.
- **Revoked** - the offer was withdrawn.

For an Onboarded offer you can also open the linked employee record. For offers in **Pending HR Review**, the **Review** button opens the onboarding review screen - see [Reviewing a new joiner's onboarding](#).

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · create offer letters. Availability depends on your company's configuration.

Creating an offer letter

Create an offer to propose a role to a candidate, then send it to them. You can keep editing an offer while it's a draft or until the candidate accepts it.

1. **Employee Lifecycle** - Open the **Employee Lifecycle** group in the menu.
2. **Offers** - Then choose **Offers**.
3. **Create Offer** - Click **Create Offer** at the top right.
4. **First Name** - The candidate's first name.
5. **Last Name** - The candidate's last name.
6. **Email** - The candidate's email - used to send the offer.
7. **Phone** - A 10-digit phone number.
8. **Designation** - Pick the role. The Department fills in automatically from the designation.
9. **Create** - Save the offer - it appears in the list as a **Draft** ready to send.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Steps

1. In the left menu, open **Employee Lifecycle** and choose **Offers**.
2. Click **Create Offer**. A panel slides in from the right.
3. Fill in the details:
 - **First Name** and **Last Name** - the candidate's name.
 - **Email** - the candidate's email address.
 - **Phone** - a 10-digit phone number.
 - **Designation** - pick the role. The **Department** is filled in automatically from the designation.
 - **Location** - the work location.
 - **Salary** - the offered salary amount.
 - **Joining Date** - the proposed start date.
 - **Probation (months)** - optional probation length.
 - **Notice Period (months)** - optional notice period.
 - **Notes** - optional internal notes.
4. Click **Create**. The offer is saved as a **Draft**.

Sending the offer

1. Back on the **Offers** list, find the draft offer.
2. Click the **Send** action and confirm. The candidate is notified and the offer moves to **Sent**.
3. If you need to send it again later, use **Resend**.

Editing or revoking

- While an offer is **Draft** or **Sent**, use the **Edit** action to update its details.
- Use the **Revoke** action to withdraw a **Draft** or **Sent** offer. This can't be undone.

Tips

- A designation with no department mapped can't be used for an offer - set the department on that designation first.

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · review offer onboarding. Availability depends on your company's configuration.

Reviewing a new joiner's onboarding

After a candidate accepts their offer, they fill in their details and upload documents through an online onboarding portal. The offer's detail screen is where HR reviews everything, approves or sends back individual sections and documents, and finally completes onboarding to activate the employee.

1. **Employee Lifecycle** - Open the **Employee Lifecycle** group in the menu.
2. **Offers** - Then choose **Offers**.
3. **Review** - On the **Pending HR Review** row, click **Review** to open the candidate's onboarding submission.
4. **Tabs** - Open each tab - **Personal**, **Bank**, **Emergency**, **Documents** - and review what the candidate submitted.
5. **Approve** - For a **Pending** section, click **Approve** to accept it, or **Reject** to send it back with remarks.
6. **Request Revision** - Use **Request Revision** to send the whole submission back to the candidate while you still have it under review.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Opening the review

1. In the left menu, open **Employee Lifecycle** and choose **Offers**.
2. Find the offer with status **Pending HR Review** and click **Review**. (For other statuses use the **View** action to open the same screen, read-only.)

What you'll see

At the top is a summary card with the candidate's name, email, the **Ref Number**, status, and details like **Designation**, **Department**, **Location**, **Joining Date**, **Salary**, **Probation**, **Notice Period** and **Submitted At**.

Below that are four tabs, one per section the candidate submitted:

- **Personal** - first/last name, email, phone, alternate phone, gender, date of birth, address.
- **Bank** - bank name, account holder, account number, branch, and the bank identifiers (bank code, IBAN, SWIFT/BIC).
- **Emergency** - emergency contact name, relation, phone and alternate phone.
- **Documents** - each uploaded document with its proof number, a download button, and its status.

Each section shows a status badge: **Not submitted**, **Pending**, **Approved** or **Rejected**.

Steps - reviewing sections and documents

1. Open a tab and check the details the candidate entered.
2. For a section that is still **Pending**, click **Approve** to accept it, or **Reject** to send it back.
 - When you **Reject**, a panel opens - enter **Remarks** (at least 5 characters) explaining what needs fixing, then click **Reject**. The candidate sees your remarks and can resubmit only the rejected items.
3. On the **Documents** tab, you can **Approve** or **Reject** each individual document, and download it first to check it.
 - Approving or rejecting the **Documents** section as a whole is final - the candidate can no longer change their uploads after that. You'll be asked to confirm.

Sending the whole submission back

While the offer is in review, click **Request Revision** (in the bar at the bottom of the screen) to send the submission back to the candidate. They're notified and can edit only the rejected sections or documents; approved items stay locked.

Completing onboarding

The **Complete Onboarding** button appears once every section and every required document is approved and nothing is rejected.

1. Click **Complete Onboarding**. A panel opens.
2. Fill in the employment details:
 - **Employee Code** - type it or click **Auto-generate** to get the next code for the location.
 - **Role** - the system role for the new employee.
 - **Shift** - select the employee's work shift.
 - **Reporting Manager** - optional.
 - **Provision Microsoft 365 mailbox** - if your company has this enabled, turn it on to create the employee's Microsoft 365 account; a preview of the email address is shown.
 - **Assign assets (optional)** - click **Add asset** to assign a laptop, phone or other item the employee will receive on day one, choosing the asset and its condition, with optional notes.
3. Click **Complete Onboarding**.

This activates the candidate's user account, issues the appointment letter, and creates the probation review automatically. The offer moves to **Onboarded**.

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view appointment letters. Availability depends on your company's configuration.

Appointment letters

The **Appointments** screen lists the appointment letters - the confirmation-of-employment letters - that have been issued to employees. One is created automatically when a new joiner's onboarding is completed, and you can also issue one manually.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Steps

1. In the left menu, open **Employee Lifecycle** and choose **Appointments**.
2. Use the search box to find an employee.
3. For an issued letter, click the document button in the **Actions** column to download the appointment letter.

What you'll see

Each row shows:

- **Employee** - the employee's name, photo and code.
- **Ref #** - the appointment letter's reference number.
- **Issued On** - the date the letter was issued.
- **Probation End** - the end date of the probation period.
- **Net Salary** - the net salary on the letter.
- **Status** - **Issued** or **Pending**.
- **Actions** - a download button for issued letters.

To issue a new one, see [Issuing an appointment letter](#).

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · issue appointment letters. Availability depends on your company's configuration.

Issuing an appointment letter

Issue an appointment letter to a confirmed employee. The letter is generated and the employee is notified. (You can also reach this action from **Issue Appointment** in the quick-create menu.)

1. **Employee Lifecycle** - Open the **Employee Lifecycle** group in the menu.
2. **Appointments** - Then choose **Appointments**.
3. **Issue Appointment** - Click **Issue Appointment** at the top right.
4. **Employee** - Pick the confirmed employee.
5. **Working Hours** - (Optional) e.g., "9:00 AM - 6:00 PM, Mon to Sat".
6. **Issue Letter** - Generate the letter - the row's status changes to **Issued** and the employee is notified.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Steps

1. In the left menu, open **Employee Lifecycle** and choose **Appointments**.
2. Click **Issue Appointment**. A panel slides in from the right.
3. Fill in:
 - **Employee** - pick the confirmed employee.
 - **Working Hours** - optional, for example "9:00 AM - 6:00 PM, Mon to Sat".
4. Click **Issue Letter**.

The letter is generated, the employee is notified, and the row's status changes to **Issued**. You can then download the letter from the **Actions** column on the Appointments list.

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view probations. Availability depends on your company's configuration.

Probations

The **Probations** screen lists employees who are on a probation period. A probation review is created automatically when a new joiner is onboarded. From here you can extend a probation or confirm the employee as permanent.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Steps

1. In the left menu, open **Employee Lifecycle** and choose **Probations**.
2. Use the search box or the **All Statuses** filter to narrow the list.
3. Use the **Actions** buttons on a row to extend the probation or submit it for confirmation.

What you'll see

Each row shows:

- **Employee** - the employee's name, photo and code.
- **Original End Date** - when the probation was originally due to end.
- **Extended End Date** - the new end date if the probation has been extended.
- **Status** - **Ongoing**, **Extended** or **Confirmed**.
- **Reviewed By** - who confirmed the employee, once confirmed.
- **Actions** - buttons to extend or confirm, available until the employee is confirmed.

For the steps to extend or confirm, see [Managing a probation](#).

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage probations. Availability depends on your company's configuration.

Managing a probation

From the **Probations** screen you can extend an employee's probation or submit them for confirmation as a permanent employee.

1. **Employee Lifecycle** - Open the **Employee Lifecycle** group in the menu.
2. **Probations** - Then choose **Probations**.
3. **Extend** - On the employee's row, click the **extend** (calendar) button in the **Actions** column.
4. **New End Date** - The new probation end date.
5. **Reason** - Why the probation is being extended.
6. **Extend** - Save - the row becomes **Extended** with the new date.
7. **Confirm** - On the employee's row, click the **confirm** (check) button in the **Actions** column.
8. **Confirmation** - A confirmation dialog explains that this routes the probation through your **Probation Confirmation Approval** workflow.
9. **Submit** - Once everyone approves, the employee becomes permanent and the row's status changes to **Confirmed**.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Extending a probation

1. In the left menu, open **Employee Lifecycle** and choose **Probations**.
2. On the employee's row, click the extend (calendar) button in the **Actions** column. A panel slides in.
3. Fill in:
 - **New End Date** - the new probation end date.
 - **Reason** - why the probation is being extended.
4. Click **Extend**. The row's status becomes **Extended** and the new date shows under **Extended End Date**.

Confirming the employee

1. On the employee's row, click the confirm (check) button in the **Actions** column.
2. A confirmation dialog appears explaining that this routes the probation through your company's **Probation Confirmation Approval** workflow.
3. Click **Submit**.

Once every required approver has approved, the employee is confirmed as permanent and the row's status becomes **Confirmed**. The approver's name appears under **Reviewed By**.

Tips

- You can extend a probation more than once before confirming.
- A confirmed probation can't be extended or re-submitted.

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view promotions. Availability depends on your company's configuration.

Promotions

The **Promotions** screen lists every promotion or redesignation recorded for your employees – a designation change, a salary increment, or both. Each one is routed through an approval workflow before it takes effect.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled – check with your HR or IT team.

Steps

1. In the left menu, open **Employee Lifecycle** and choose **Promotions**.
2. Use the search box to find a promotion.
3. Click the eye button in the **Actions** column to open the full **Promotion Details**, including the approval timeline with each approver's notes.
4. For a draft promotion, click the send button to submit it for approval.

What you'll see

Each row shows:

- **Employee** – the employee's name, photo and code.
- **Type** – **Salary Increment**, **Designation Change** or **Both**.
- **Previous Designation** and **New Designation**.
- **Previous Salary** and **New Salary**.
- **Increment %** – the percentage increase.
- **Effective Date** – when the promotion takes effect.
- **Status** – see below.
- **Actions** – view details, and (for drafts) submit for approval.

Statuses

- **Draft** – created but not yet submitted for approval.
- **Pending Approval** – submitted and waiting on approvers.
- **Approved** – all approvers have approved.
- **Applied** – the promotion has taken effect on the employee's record.
- **Rejected** – an approver rejected it.

To create one, see [Creating a promotion](#).

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · create promotions. Availability depends on your company's configuration.

Creating a promotion

Record a promotion for an employee - a designation change, a salary increment, or both - then submit it for approval.

1. **Employee Lifecycle** - Open the **Employee Lifecycle** group in the menu.
2. **Promotions** - Then choose **Promotions**.
3. **Create Promotion** - Click **Create Promotion** at the top right.
4. **Employee** - Pick the employee.
5. **Effective Date** - When the promotion should take effect.
6. **Promotion Type** - **Salary Increment**, **Designation Change** or **Both**.
7. **Reason** - (Optional) Reason for the promotion.
8. **Create** - Save the promotion - it appears in the list as a **Draft**.
9. **Promotions list** - Find the draft promotion in the list - it shows status **Draft**.
10. **Submit for Approval** - Click the send icon - the promotion moves to **Pending Approval** and goes through your workflow.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Steps

1. In the left menu, open **Employee Lifecycle** and choose **Promotions**.
2. Click **Create Promotion**. A panel slides in from the right.
3. Fill in:
 - **Employee** - pick the employee. Their current salary and designation are shown for reference once selected.
 - **Effective Date** - when the promotion should take effect.
 - **Promotion Type** - **Salary Increment**, **Designation Change** or **Both**.
 - **New Designation** - shown when the type is Designation Change or Both. Required in that case.
 - **New Salary** - shown when the type is Salary Increment or Both. Required in that case. The increment percentage is calculated and shown as you type.
 - **Reason** - optional reason for the promotion.
4. Click **Create**. The promotion is saved as a **Draft**.

Submitting for approval

1. Back on the **Promotions** list, find the draft promotion.
2. Click the send button in the **Actions** column.

The promotion moves to **Pending Approval** and goes through your company's promotion approval workflow. You can follow its progress in the **Promotion Details** panel (the eye button), which shows each approval step, the approver, when they acted, and any notes.

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view bonuses. Availability depends on your company's configuration.

Bonus cycles

The **Bonus Cycles** screen lists your bonus processing cycles. A cycle is a one-time bonus run - for example a year-end bonus - with a processing date and a default percentage that's applied to eligible employees. Once a cycle's bonuses are generated, the cycle is sent for approval.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Steps

1. In the left menu, open **Employee Lifecycle** and choose **Bonus Cycles**.
2. Use the search box to find a cycle.
3. Use the **Actions** buttons on a row to generate the bonuses for a draft cycle, or submit a generated cycle for approval.

What you'll see

Each row shows:

- **Name** - the cycle's name.
- **Year** - the year the cycle is for.
- **Processing Date** - when the bonuses are processed.
- **Default %** - the default bonus percentage applied to eligible employees.
- **Status** - see below.
- **Bonus Count** - how many bonus entries have been generated for the cycle.
- **Actions** - generate bonuses or submit for approval, depending on status.

Statuses

- **Draft** - created but bonuses not yet generated.
- **Generated** - bonus entries have been created for eligible employees.
- **Pending Approval** - the cycle has been submitted through the approval workflow.
- **Completed** - the cycle has been approved and processed.

To create and run a cycle, see [Managing a bonus cycle](#).

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage bonus cycles. Availability depends on your company's configuration.

Managing a bonus cycle

Create a bonus cycle, generate the bonus entries for it, adjust individual bonuses if needed, then submit the cycle for approval.

1. **Employee Lifecycle** - Open the **Employee Lifecycle** group in the menu.
2. **Bonus Cycles** - Then choose **Bonus Cycles**.
3. **Create Cycle** - Click **Create Cycle** at the top right.
4. **Name** - A name for the cycle.
5. **Year** - The year it applies to.
6. **Default** - Default bonus percentage for eligible employees.
7. **Processing Date** - When the bonuses are processed.
8. **Create** - Save the cycle - it appears in the list as a **Draft**.
9. **Draft row** - Find the draft cycle on the list.
10. **Generate** - Click the **play** button - a bonus entry is created for every eligible employee, and the cycle moves to **Generated**.
11. **Generated row** - Find the generated cycle.
12. **Submit for Approval** - The cycle moves to **Pending Approval** and routes through your **Bonus Cycle Approval** workflow.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Creating a cycle

1. In the left menu, open **Employee Lifecycle** and choose **Bonus Cycles**.
2. Click **Create Cycle**. A panel slides in from the right.
3. Fill in:
 - **Name** - a name for the cycle.
 - **Year** - the year it applies to.
 - **Default %** - the default bonus percentage for eligible employees.
 - **Processing Date** - when the bonuses are processed.
 - **Notes** - optional.
4. Click **Create**. The cycle is saved as a **Draft**.

Generating the bonuses

1. On the **Bonus Cycles** list, find the draft cycle.
2. Click the play button in the **Actions** column and confirm.

This creates a bonus entry for every eligible employee using the cycle's default percentage, and the cycle moves to **Generated**. The **Bonus Count** column updates.

Editing or skipping individual bonuses

Once bonuses are generated, you can adjust a specific employee's bonus amount or skip it entirely so they're left out of this cycle. (These changes are made per bonus entry.)

Submitting for approval

1. On the **Bonus Cycles** list, find the generated cycle.
2. Click the check button in the **Actions** column and confirm.

The cycle is routed through your company's **Bonus Cycle Approval** workflow and moves to **Pending Approval**. Once approved it becomes **Completed**.

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view warning letters. Availability depends on your company's configuration.

Warning letters

The **Warning Letters** screen lists performance warning letters issued to employees - for example for missing a target. These are separate from disciplinary warnings, which are handled elsewhere.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Steps

1. In the left menu, open **Employee Lifecycle** and choose **Warning Letters**.
2. Use the search box to find a warning letter.

What you'll see

Each row shows:

- **Employee** - the employee's name, photo and code.
- **Date** - the warning date.
- **Reason** - the reason for the warning (shown shortened in the list).
- **Target Amount** - a target figure tied to the warning, if any.
- **Grace Period End** - the date the grace period ends, if set.
- **Issued By** - who issued the warning.
- **Acknowledged** - **Yes** or **No**, showing whether the employee has acknowledged it.

To issue one, see [Creating a warning letter](#).

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · create warning letters. Availability depends on your company's configuration.

Creating a warning letter

Issue a performance warning letter to an employee.

1. **Employee Lifecycle** - Open the **Employee Lifecycle** group in the menu.
2. **Warning Letters** - Then choose **Warning Letters**.
3. **Issue Warning** - Click **Issue Warning** at the top right of the list.
4. **Employee** - Pick the employee receiving the warning.
5. **Warning Date** - The date of the warning.
6. **Reason** - Why the warning is being issued.
7. **Target Amount** - (Optional) A target figure tied to this warning.
8. **Grace Period End** - (Optional) Date by which the employee is expected to improve.
9. **Consequences** - (Optional) What happens if there is no improvement.
10. **Issue Warning** - Save the warning - it appears in the list and the employee is notified.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Steps

1. In the left menu, open **Employee Lifecycle** and choose **Warning Letters**.
2. Click **Issue Warning**. A panel slides in from the right.
3. Fill in:
 - **Employee** - pick the employee.
 - **Warning Date** - the date of the warning.
 - **Reason** - why the warning is being issued.
 - **Target Amount** - optional target figure tied to the warning.
 - **Grace Period End** - optional date by which the employee is expected to improve.
 - **Consequences** - optional, what happens if there's no improvement.
 - **Notes** - optional additional notes.
4. Click **Issue Warning**.

The warning letter appears in the list. The employee can view and acknowledge it; the **Acknowledged** column shows whether they have.

Note

The warning letter list has no "submit for approval" button, though the underlying approval workflow exists.

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view separations. Availability depends on your company's configuration.

Separations

The **Separations** screen lists every employee exit your team is handling - whether the employee resigned (relieving) or was let go (termination). A separation moves through approval, notice period, no-dues clearances and final settlement before it's completed.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Steps

1. In the left menu, open **Employee Lifecycle** and choose **Separations**.
2. Use the search box, the **All Types** filter or the **All Statuses** filter to narrow the list.
3. For an **Initiated** or **Rejected** separation, click the send button in the **Actions** column to submit (or re-submit) it for approval.

What you'll see

Each row shows:

- **Employee** - the employee's name, photo and code.
- **Type** - **Relieving** or **Termination**.
- **Resignation Date** - the date the resignation/exit was recorded.
- **Notice Period** - the notice period in months.
- **Last Working Date** - the employee's last day.
- **Status** - see below.
- **Actions** - submit/re-submit for approval, where applicable.

Statuses

- **Initiated** - recorded but not yet submitted for approval.
- **Pending Approval** - submitted and waiting on approvers.
- **Rejected** - an approver rejected it; HR can address the notes and re-submit.
- **Notice Period** - approved; the employee is serving notice.
- **NDC Pending** - waiting on departments to complete no-dues clearances.
- **Settlement Pending** - waiting on the final settlement.
- **Completed** - the exit is fully processed.

To start and progress a separation, see [Managing a separation](#).

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage separations. Availability depends on your company's configuration.

Managing a separation

Record an employee's exit, submit it for approval, and let it move through the stages until it's completed.

1. **Employee Lifecycle** - Open the **Employee Lifecycle** group in the menu.
2. **Separations** - Then choose **Separations**.
3. **Initiate Separation** - Click **Initiate Separation** at the top right.
4. **Employee** - Pick the employee.
5. **Type** - **Relieving** or **Termination**.
6. **Resignation Date** - The date the resignation/exit is recorded.
7. **Last Working Date** - The employee's last day.
8. **Initiate** - The separation is created with status **Initiated**.
9. **Separations list** - Find the separation on the list.
10. **Submit for Approval** - The separation moves to **Pending Approval**.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Initiating a separation

1. In the left menu, open **Employee Lifecycle** and choose **Separations**.
2. Click **Initiate Separation**. A panel slides in from the right.
3. Fill in:
 - **Employee** - pick the employee.
 - **Type** - **Relieving** or **Termination**.
 - **Resignation Date** - the date the resignation/exit is recorded.
 - **Last Working Date** - the employee's last day.
 - **Reason** - optional.
 - **Notes** - optional.
4. Click **Initiate**. The separation is created with status **Initiated**.

Submitting for approval

1. On the **Separations** list, find the separation.

2. Click the send button in the **Actions** column.

The separation moves to **Pending Approval**. If an approver rejects it, the status becomes **Rejected** - address their notes and re-submit using the same action.

The stages a separation goes through

Once approved, a separation moves through:

1. **Notice Period** - the employee serves their notice.
2. **NDC Pending** - each department completes its no-dues clearance. See [Managing no-dues clearances](#).
3. **Settlement Pending** - the final settlement is prepared and approved. See [Managing a final settlement](#).
4. **Completed** - the exit is fully processed.

Note

The Separations screen lets you initiate a separation and submit it for approval. There is no control for editing its details, changing the notice period, or marking it complete by hand.

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view ndc. Availability depends on your company's configuration.

No-dues clearances

When an employee leaves, each relevant department signs off that the employee has no outstanding dues with them. Together these make up the employee's No Dues Certificate (NDC). The **NDC** screen is a worklist of these department clearances - one row per department per separating employee.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Steps

1. In the left menu, open **Employee Lifecycle** and choose **NDC**.
2. Use the search box or the status filter (which defaults to **Pending**) to find clearances waiting on you.
3. For a pending clearance, click **Process** to record your decision - see [Managing no-dues clearances](#).

What you'll see

Each row shows:

- **Employee** - the separating employee's name, photo and code.
- **Department** - the department whose sign-off this row is for: **HOD**, **Accounts**, **IT** or **HR**.
- **Last Working Day** - the employee's last day.
- **Status** - **Pending**, **Cleared** or **Rejected**.
- **Actions** - a **Process** button for pending clearances.

An employee's exit can't move past the no-dues stage until all of their department clearances are dealt with.

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage ndc clearances. Availability depends on your company's configuration.

Managing no-dues clearances

Record your department's no-dues decision for a separating employee.

1. **Employee Lifecycle** - Open the **Employee Lifecycle** group in the menu.
2. **NDC** - Then choose **NDC**.
3. **Pending row** - Find the clearance row for the employee and your department. The list defaults to **Pending** items.
4. **Process** - Click **Process** on the row - a panel opens.
5. **Decision** - Pick **Cleared** (no outstanding dues) or **Rejected** (dues to settle first).
6. **Remarks** - (Optional) Notes about the decision.
7. **Submit Clearance** - Save - the row's status changes to **Cleared** or **Rejected**.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Steps

1. In the left menu, open **Employee Lifecycle** and choose **NDC**.
2. Find the clearance row for the employee and your department. The list defaults to **Pending** items.
3. Click **Process**. A panel slides in showing which department clearance you're recording.
4. Choose a **Decision**:
 - **Cleared** - the employee has no outstanding dues with your department.
 - **Rejected** - there are outstanding dues to settle first.
5. Optionally add **Remarks**.
6. Click **Submit Clearance**.

The row's status changes to **Cleared** or **Rejected**. Once every department clearance for that employee has been recorded, the separation can move on to the final settlement stage.

Tips

- Use the status filter at the top of the list to switch between **Pending**, **Cleared**, **Rejected** or all clearances.

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view settlements. Availability depends on your company's configuration.

Final settlements

The **Settlements** screen lists the full and final settlements for separating employees. A settlement adds up everything still owed to the employee (pending salary, leave encashment, bonus, gratuity and other earnings) less any deductions (loans, advances and other deductions), giving a net amount to pay out.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Steps

1. In the left menu, open **Employee Lifecycle** and choose **Settlements**.
2. Use the search box to find a settlement.
3. Click the eye button in the **Actions** column to open the **Settlement Details** panel with the full breakdown.
4. For a draft settlement, click the send button to submit it for approval; for an approved one, click the mark-paid button once it's been paid.

What you'll see

Each row shows:

- **Employee** - the employee's name, photo and code.
- **Pending Salary, Leave Encashment, Bonus, Loan Deduction** - the main line items.
- **Net Amount** - the final amount payable.
- **Status** - see below.
- **Due Date** - when the settlement is due.
- **Actions** - view, submit for approval, mark paid.

The details panel breaks the figures into **Earnings** (pending salary, leave encashment, bonus, gratuity, other earnings) and **Deductions** (loan deduction, advance deduction, other deductions), with the **Net Amount**, status, due date and any notes.

Statuses

- **Draft** - created but not yet submitted.
- **Pending Clearance** - waiting on no-dues clearances.
- **Pending Approval** - submitted and waiting on approvers.
- **Approved** - approved, ready to be paid.
- **Paid** - the settlement has been paid out.

To work with a settlement, see [Managing a final settlement](#).

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · create settlements. Availability depends on your company's configuration.

Managing a final settlement

Review a separating employee's settlement, submit it for approval, and mark it paid once it's been paid out.

1. **Employee Lifecycle** - Open the **Employee Lifecycle** group in the menu.
2. **Settlements** - Then choose **Settlements**.
3. **View** - Find the employee's settlement and click the **eye** button in the **Actions** column.
4. **Settlement Details** - The panel shows **Earnings**, **Deductions**, **Net Amount**, status, due date and notes.
5. **Draft row** - On the **Settlements** list, find a settlement in **Draft**.
6. **Submit for Approval** - The settlement moves to **Pending Approval**.
7. **Approved row** - Once a settlement is **Approved** and has actually been paid out, find it in the list.
8. **Mark Paid** - The status changes to **Paid**.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Reviewing the breakdown

1. In the left menu, open **Employee Lifecycle** and choose **Settlements**.
2. Find the employee's settlement and click the eye button in the **Actions** column.
3. The **Settlement Details** panel shows the **Earnings** (pending salary, leave encashment, bonus, gratuity, other earnings), the **Deductions** (loan deduction, advance deduction, other deductions), the **Net Amount**, the status, the due date and any notes.

Submitting for approval

1. On the **Settlements** list, find a settlement in **Draft**.
2. Click the send button in the **Actions** column.

The settlement moves to **Pending Approval** and goes through your company's approval workflow. When all approvers approve, it becomes **Approved**.

Marking it paid

1. Once a settlement is **Approved** and has actually been paid out, find it in the list.

2. Click the mark-paid button in the **Actions** column.

The status changes to **Paid**.

Note

The Settlements screen lets you view a settlement, submit it for approval and mark it paid. It has no control for creating a settlement or editing its amounts - the figures are calculated by the system.

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view lifecycle letters. Availability depends on your company's configuration.

Lifecycle letters

As an employee moves through their lifecycle, the system produces formal letters: the offer letter, the appointment (confirmation-of-employment) letter, increment letters from promotions, performance warning letters, and relieving and experience letters on exit. Each letter can be previewed, downloaded as a PDF, and regenerated.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Where letters appear

There isn't a single dedicated "Letters" screen in the menu. Instead, you reach a letter from the screen it belongs to:

- **Appointment letters** - from the **Appointments** screen, use the download button on a row that has been issued.
- **Offer letters** - from the **Offers** screen and the offer detail screen.
- **Increment letters** - alongside the related promotion.
- **Warning letters** - alongside the related warning letter.
- **Relieving and experience letters** - alongside the related separation.

An employee's letters are also collected on their profile so you can see them all in one place.

Steps

1. Open the screen that the letter belongs to (for example **Appointments** for an appointment letter).
2. Use the download or view action on the row.
3. To get a fresh copy after the underlying details changed, use the regenerate option for that letter.

Note

There is no standalone "Lifecycle letters" page. Each letter is previewed, downloaded and regenerated from the lifecycle screen that produced it - offers from Offers, appointments from Appointments, and so on.

Requires EmployeeLifecycle module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view employee timeline. Availability depends on your company's configuration.

Employee timeline (admin view)

An employee's lifecycle timeline is a chronological list of the milestones in their journey - joining, confirmation, promotions, bonuses, warnings, separation and so on.

Availability

The Employee Lifecycle area may not be turned on for your company yet. If you don't see it in your menu, it isn't enabled - check with your HR or IT team.

Status of this screen

There is no dedicated admin "Employee timeline" screen in the app today. Employees can see their own timeline through the self-service portal ("My timeline"), but there is no separate admin page that shows another employee's lifecycle timeline.

Requires Asset module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view assets. Availability depends on your company's configuration.

Asset inventory

The **All Assets** screen lists every asset your organization tracks, with search, filters, and quick actions. Open **Asset Management** → **All Assets** to get there.

1. **Asset Management** - Open the **Asset Management** group in the menu.
2. **All Assets** - Then choose **All Assets**.

Steps

1. In the left menu, open **Asset Management** → **All Assets**.
2. Use the **Search assets...** box to find an asset by name, serial number, brand, model, or category.
3. Use the **All Categories** dropdown to show only assets in one category.
4. Use the **All Statuses** dropdown to show only assets with a given status: **Available**, **Assigned**, **Maintenance**, or **Retired**.
5. Click a column header (**Name**, **Category**, **Serial Number**, **Status**) to sort by it.
6. Use the row actions on the right to view, edit, or delete an asset.

What you'll see

The list shows these columns:

- **Name** - the asset's name.
- **Category** - the category it belongs to.
- **Serial Number** - the manufacturer serial number, or a dash if none.
- **Brand / Model** - the brand and model together, or a dash if neither is set.
- **Status** - a coloured badge: **Available**, **Assigned**, **Maintenance**, or **Retired**.
- **Condition** - a coloured badge: **New**, **Good**, **Fair**, **Poor**, or **Damaged**, or a dash if not recorded.
- **Assigned To** - the employee who currently holds the asset, if any.
- **Actions** - a view (eye) button that opens the asset's details, plus an edit (pencil) button and a delete (trash) button if you have permission.

At the top right, if you have permission, you'll also see **Bulk Upload** and **Add Asset** buttons.

Tips

- The view (eye) action is always available; the edit and delete actions appear only if your role allows them.
- To see assets handed out to staff, open **Asset Management** → **Assignments** instead - see [Asset assignments](#).

Requires Asset module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · create assets. Availability depends on your company's configuration.

Adding an asset

Add a new asset to your inventory from the **All Assets** screen. A new asset starts with the status **Available** so you can assign it later.

1. **Asset Management** - Open the **Asset Management** group in the menu.
2. **All Assets** - Then choose **All Assets**.
3. **Add Asset** - Click **Add Asset** at the top right.
4. **Category** - Required. Pick the category - Laptops, Phones, Furniture, etc.
5. **Name** - Required. A short label for the asset.
6. **Serial Number** - Optional, must be unique across assets.
7. **Asset Tag** - Optional, must be unique.
8. **Purchase Price** - Optional. Zero or a positive number.
9. **Condition** - Optional. New, Good, Fair, Poor, Damaged, or None.
10. **Create** - Save the asset - it appears in the list with status **Available**.

Steps

1. In the left menu, open **Asset Management → All Assets**.
2. Click **Add Asset** at the top right. A panel slides in from the right.
3. Choose a **Category** (required).
4. Enter a **Name** (required).
5. Fill in the optional details as needed:
 - **Serial Number**
 - **Asset Tag**
 - **Brand** and **Model**
 - **Purchase Date** and **Purchase Price**
 - **Warranty Expiry**
 - **Condition** - **New**, **Good**, **Fair**, **Poor**, **Damaged**, or **None**
 - **Notes**
6. If the chosen category supports accessories, an **Accessories** section appears. Click **Add** to include an item shipped with the asset, then fill in its **Name** (required), serial number, condition, and notes. Repeat for each accessory, or use the trash icon to remove one.
7. Click **Create** to save the asset.

What you'll see

The new asset appears in the **All Assets** list with the **Available** status and the condition you chose, if any.

Tips

- **Serial Number** and **Asset Tag** must be unique - if another asset already uses the same value, you'll see an error and the asset won't be saved.
- **Purchase Price** must be zero or a positive number.
- Accessories are only shown when the chosen category is set up to have them. You can also add or change accessories later from the asset's details page.

Troubleshooting

- **"Category is required" / "Name is required"** - fill in the highlighted field and try again.
- **The save fails with a field error** - read the message under the field, fix the value, and click **Create** again.

Requires Asset module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · create assets. Availability depends on your company's configuration.

Bulk uploading assets

If you have many assets to add at once, upload them from a spreadsheet instead of adding them one by one. You can import up to 170 assets per file.

1. **Asset Management** - Open the **Asset Management** group in the menu.
2. **All Assets** - Then choose **All Assets**.
3. **Bulk Upload** - Click **Bulk Upload** at the top right of the list.
4. **Download Template** - Click **Download Template** - a spreadsheet with the required columns downloads.
5. **Choose a file** - Pick the CSV or XLSX you filled in (up to 170 rows).
6. **Upload** - Import the file. The result panel shows how many rows imported and lists any errors.

Steps

1. In the left menu, open **Asset Management → All Assets**.
2. Click **Bulk Upload** at the top right. A panel slides in from the right.
3. Under **Step 1 - Download the template**, click **Download Template**. This downloads a spreadsheet with the columns you need to fill in.
4. Open the template and add one row per asset. The columns are: **name**, **category**, **serial_number**, **asset_tag**, **brand**, **model**, **status**, **condition**, **purchase_date**, **purchase_price**, **warranty_expiry**, and **notes**.
 - **name** and **category** are required on every row.
 - **category** must exactly match the name of an existing asset category.
 - Dates use the format YYYY-MM-DD (for example, 2025-04-01).
 - **status** must be one of the allowed asset statuses, and **condition** one of: new, good, fair, poor, damaged.
5. Save the file as CSV or XLSX.
6. Back in the panel, under **Step 2 - Choose a file**, click the file picker and select your file. The selected file name appears below it.
7. Click **Upload**.
8. Review the result message. It shows how many rows were imported. If any rows failed, an **Errors** table lists each row number and what went wrong - fix those rows in your file and upload again.
9. Click **Close** when you're done.

Tips

- The template includes one example row so you can see the expected format for dates, prices, and the status and condition values.
- Accessories are not part of bulk upload. Add them from each asset's details page after the import - see [An asset's details](#).
- Rows that import successfully are added even if other rows in the same file fail, so you only need to re-upload the rows you fixed.

Troubleshooting

- **"Category '...' not found"** - the category name in that row doesn't match any existing category. Create the category first (see [Asset categories](#)) or correct the spelling.
- **A date or price error** - make sure dates are written as YYYY-MM-DD and prices are plain numbers (for example, 85000.00).
- **"Maximum 170 rows allowed"** - split your data into smaller files and upload them one at a time.

Requires Asset module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view assets. Availability depends on your company's configuration.

An asset's details

The asset details page shows everything about a single asset - its information, who currently holds it, its full history, maintenance records, documents, and an activity timeline. It's also where you assign, return, and maintain the asset.

1. **Asset Management** - Open the **Asset Management** group in the menu.
2. **All Assets** - Then choose **All Assets**.
3. **View** - Find the asset and click the **view** (eye) action.
4. **Actions** - Use the buttons at the top right - **Edit**, **Assign Asset** (when available) or **Return Asset** (when assigned), **Add Maintenance**, **Delete**.

Steps

1. In the left menu, open **Asset Management** → **All Assets**.
2. Find the asset and click the view (eye) action on its row.
3. Review the sections on the page (described below).
4. Use the buttons at the top right to act on the asset, if you have permission:
 - **Edit** - change the asset's details.
 - **Assign Asset** - hand the asset to an employee (shown when the asset is **Available**). See [Assigning an asset](#).
 - **Return Asset** - record the asset coming back (shown when the asset is **Assigned**). See [Returning an asset](#).
 - **Add Maintenance** - log a maintenance event. See [Asset maintenance](#).
 - **Delete** - permanently remove the asset.

What you'll see

- **Asset Details** - the asset's status and condition badges, plus **Category**, **Serial Number**, **Brand**, **Model**, **Purchase Date**, **Purchase Price**, **Warranty Expiry**, **Asset Tag**, and **Notes**.
- **Current Assignment** - the employee who currently holds the asset and since when, or **Unassigned**.
- **Accessories** - items linked to the asset, with each accessory's name, condition, serial number, and notes.
- **Assignment History** - every past and present assignment, showing the employee, status, the dates assigned and returned, the condition out and condition in, and any notes.
- **Maintenance History** - each maintenance record, with the date performed, type, description, cost, vendor, next due date, who logged it, and notes. See [Asset maintenance](#).
- **Documents** - files attached to the asset, such as invoices, warranties, and manuals. See [Asset documents](#).
- **Activity Timeline** - a dated feed of everything that has happened to the asset: assignments, returns, status changes, maintenance, document uploads, accessory changes, and approval steps.

Tips

- The action buttons that appear depend on both the asset's current status and your permissions.
- The **Edit** button opens the same edit panel used on the **All Assets** screen.

Troubleshooting

- **The page doesn't load** - go back to **Asset Management → All Assets** and open the asset again; it may have been deleted.

Requires Asset module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage asset categories. Availability depends on your company's configuration.

Asset categories

Categories group your assets - for example, Laptops, Phones, or Furniture. Every asset belongs to a category. Open **Asset Management** → **Categories** to manage them.

1. **Asset Management** - Open the **Asset Management** group in the menu.
2. **Categories** - Then choose **Categories**.
3. **Search** - Use the **Search categories...** box to find a category by name, slug, or description.
4. **Add Category** - Click **Add Category** at the top right.
5. **Name** - Required. The category name (e.g. Laptops).
6. **Slug** - Optional. Leave blank to auto-generate from the name.
7. **Has Accessories** - Turn on if assets in this category come with accessories you want to track.
8. **Description** - Optional. A short description of what the category contains.
9. **Create** - Save the new category - it appears in the list.
10. **Edit** - Click the **edit** (pencil) action on the category's row.
11. **Update** - Save your changes.
12. **Delete** - Click the **delete** (trash) action on the category's row.
13. **Delete** - Confirm - the category is removed.

Steps

View categories

1. In the left menu, open **Asset Management** → **Categories**.
2. Use the **Search categories...** box to find a category by name, slug, or description.
3. Click the **Name** or **Slug** column header to sort.

Add a category

1. Click **Add Category** at the top right. A panel slides in from the right.
2. Enter a **Name** (required).
3. Optionally enter a **Slug** - leave it blank to have one generated automatically.
4. Turn on **Has Accessories** if assets in this category come with accessories you want to track.
5. Optionally add a **Description**.
6. Click **Create**.

Edit a category

1. Click the edit (pencil) action on the category's row.
2. Update the fields in the panel.
3. Click **Update**.

Delete a category

1. Click the delete (trash) action on the category's row.
2. Confirm by clicking **Delete**.

What you'll see

The list shows these columns:

- **Name** - the category name.
- **Slug** - the category's short identifier.
- **Workflow Code** - an approval workflow code, or a dash if none. The create and edit panel does not expose this field.
- **Has Accessories** - **Yes** or **No**.
- **Asset Count** - how many assets are in the category.
- **Actions** - edit (pencil) and delete (trash) buttons, if you have permission.

Tips

- Turning on **Has Accessories** makes the **Accessories** section appear when adding or editing an asset in that category.
- A category's **Asset Count** helps you see which categories are in use before deleting one.

Troubleshooting

- **The delete fails** - a category that still has assets may not be removable. Move or remove its assets first, then try again.

Requires Asset module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view all asset assignments. Availability depends on your company's configuration.

Asset assignments

The **Assignments** screen shows who has which asset - every current and past hand-out across your organization. Open **Asset Management** → **Assignments** to see it.

1. **Asset Management** - Open the **Asset Management** group in the menu.
2. **Assignments** - Then choose **Assignments**.

Steps

1. In the left menu, open **Asset Management** → **Assignments**.
2. Use the **Search assignments...** box to find an assignment by asset name, serial number, category, or employee name or code.
3. Use the **All Statuses** dropdown to show only assignments with a given status.
4. Click a column header (**Asset Name**, **Category**, **Assigned At**, **Status**) to sort.

What you'll see

The list shows these columns:

- **Asset Name** - the asset that was assigned.
- **Category** - the asset's category.
- **Assigned To** - the employee who received the asset.
- **Assigned At** - the date the asset was handed over.
- **Status** - a coloured badge: **Pending Approval**, **Active**, **Returned**, **Rejected**, or **Cancelled**.
- **Condition** - the condition recorded when the asset was handed over (**New**, **Good**, **Fair**, **Poor**, or **Damaged**), or a dash if not recorded.

Tips

- To assign a new asset or record a return, open the asset's details page (see [An asset's details](#)) and use the **Assign Asset** or **Return Asset** button there.
- An **Active** assignment is the one the employee currently holds; **Returned** assignments are completed.

Troubleshooting

- **An assignment isn't listed** - clear the **Search** box and reset the **All Statuses** filter, then look again.

Requires Asset module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · assign assets. Availability depends on your company's configuration.

Assigning an asset

Hand an asset to an employee from the asset's details page. The assignment takes effect immediately and the asset moves to the **Assigned** status.

1. **Asset Management** - Open the **Asset Management** group in the menu.
2. **All Assets** - Then choose **All Assets**.
3. **Assign Asset** - On an **Available** asset, click **Assign Asset** at the top right.
4. **Employee** - Required. Pick the person receiving the asset.
5. **Condition** - **New**, **Good**, **Fair**, **Poor**, or **Damaged**.
6. **Notes** - (Optional) Any remarks about the hand-over.
7. **Assign Asset** - The asset moves to **Assigned** and shows under **Current Assignment**.

Steps

1. In the left menu, open **Asset Management → All Assets**.
2. Find the asset (it must be **Available**) and click the view (eye) action to open its details.
3. Click **Assign Asset** at the top right. A panel slides in from the right.
4. Choose the **Employee** to assign the asset to (required).
5. Set the **Condition at Assignment** - **New**, **Good**, **Fair**, **Poor**, or **Damaged**.
6. Optionally add **Notes** about the hand-over.
7. Click **Assign Asset**.

What you'll see

The asset's status changes to **Assigned**, the employee appears under **Current Assignment**, and a new entry is added to **Assignment History** and the **Activity Timeline**.

Tips

- The **Assign Asset** button only appears when the asset is **Available** and has no assignment in progress.
- To hand the asset back later, use **Return Asset** on the same page - see [Returning an asset](#).

Troubleshooting

- **"Select an employee"** - you must pick an employee before you can assign the asset.
- **The assignment is rejected** - the asset may no longer be available (someone else may have assigned it). Reopen the asset's details to check its current status.

Requires Asset module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · return assets. Availability depends on your company's configuration.

Returning an asset

When an employee hands an asset back, record the return from the asset's details page. The asset then moves back to the **Available** status so it can be assigned again.

1. **Asset Management** - Open the **Asset Management** group in the menu.
2. **All Assets** - Then choose **All Assets**.
3. **Return Asset** - On an **Assigned** asset, click **Return Asset** at the top right.
4. **Return Date** - Required. Defaults to today.
5. **Condition on Return** - Required. New / Good / Fair / Poor / Damaged.
6. **Notes** - (Optional) Any remarks about the return.
7. **Confirm Return** - The asset moves back to **Available** and the assignment closes out in **Assignment History**.

Steps

1. In the left menu, open **Asset Management → All Assets**.
2. Find the asset (it must be **Assigned**) and click the view (eye) action to open its details.
3. Click **Return Asset** at the top right. A panel slides in from the right.
4. Set the **Return Date** (required) - it defaults to today.
5. Set the **Condition on Return** (required) - **New**, **Good**, **Fair**, **Poor**, or **Damaged**.
6. Optionally add **Notes** with any remarks about the return.
7. Click **Confirm Return**.

What you'll see

The asset's status changes to **Available**, the **Current Assignment** clears, and the assignment is closed out in **Assignment History** with the return date and condition. The return is also added to the **Activity Timeline**.

Tips

- The **Return Asset** button only appears when the asset is currently **Assigned**.
- Logging maintenance with the asset status set to **Available** also returns the current assignment automatically - see [Asset maintenance](#).

Troubleshooting

- **The return fails** - the assignment may no longer be active (it may already have been returned). Reopen the asset's details to check its current status.

Note

The details page records a return in a single action - there is no separate return-request step to approve first.

Requires Asset module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage asset maintenance. Availability depends on your company's configuration.

Asset maintenance

Record repairs, servicing, and inspections against an asset so you have a full maintenance history. You can also change the asset's status as part of logging maintenance.

1. **Asset Management** - Open the **Asset Management** group in the menu.
2. **All Assets** - Then choose **All Assets**.
3. **Add Maintenance** - Click **Add Maintenance** at the top right of the page.
4. **Performed On** - Required. Defaults to today.
5. **Type** - **Preventive** or **Corrective**.
6. **Description** - Required. What work was done.
7. **Cost** - (Optional) What it cost.
8. **Next Due Date** - (Optional) When the next service is due - must be on or after **Performed On**.
9. **Save Maintenance** - The record appears at the top of **Maintenance History**.

Steps

View maintenance history

1. In the left menu, open **Asset Management** → **All Assets**.
2. Open the asset's details (the view / eye action).
3. Scroll to the **Maintenance History** card. Each record shows the date performed, type, description, cost, vendor, next due date, who logged it, and notes.

Log a maintenance event

1. On the asset's details page, click **Add Maintenance** at the top right. A panel slides in from the right.
2. Set the **Performed On** date (required) - it defaults to today.
3. Choose the **Type** - **Preventive** or **Corrective**.
4. Enter a **Description** (required) of the work done.
5. Optionally enter the **Cost** and the **Vendor**.
6. Optionally set a **Next Due Date** for the next service (it must be on or after the **Performed On** date).
7. Optionally add **Notes**.
8. If the asset's status should change after this maintenance, turn on **Update asset status after maintenance?** and choose the **New Asset Status** - **Available**, **Assigned**, **In Maintenance**, **Decommissioned**, or **Lost**.
9. Click **Save Maintenance**.

What you'll see

The new record appears at the top of **Maintenance History**, and the event is added to the **Activity Timeline**. If you changed the asset's status, the **Asset Details** card updates to show it.

Tips

- If you set the new asset status to **Available** while the asset is currently **Assigned**, the current assignment is automatically returned.

Troubleshooting

- **"Description is required"** - enter what was done before saving.
- **The next due date is rejected** - it must be the same as, or later than, the **Performed On** date.

Requires Asset module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage asset documents. Availability depends on your company's configuration.

Asset documents

Attach files to an asset - purchase invoices, warranty certificates, manuals, and more - so they're kept alongside the asset record.

1. **Asset Management** - Open the **Asset Management** group in the menu.
2. **All Assets** - Then choose **All Assets**.

Steps

View documents

1. In the left menu, open **Asset Management** → **All Assets**.
2. Open the asset's details (the view / eye action).
3. Scroll to the **Documents** card. Each file shows its name, type, and size. Click a file name to open it in a new tab.

Upload a document

1. On the asset's details page, in the **Documents** card, click the **File** picker and choose a file.
2. Choose a **Type** - **Invoice**, **Warranty**, **Manual**, or **Other**.
3. Click **Upload**.

Delete a document

1. In the **Documents** card, click the delete (trash) action next to the file.
2. Confirm by clicking **Delete**. The file is permanently removed.

What you'll see

The uploaded file appears in the **Documents** list, and the upload is added to the **Activity Timeline**.

Tips

- You can upload PDF, JPG, PNG, Word, and Excel files, up to 10 MB each.
- The upload and delete controls only appear if you have permission to manage asset documents.

Troubleshooting

- **The upload is rejected** - check the file type and that it's under the size limit, then try again.
- **"Pick a file to upload"** - choose a file in the **File** picker before clicking **Upload**.

Requires Loan module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view loans. Availability depends on your company's configuration.

Loans

The **All Loans** page lists every employee loan in your organization, with its amount, monthly instalment, outstanding balance and status. Open it from **Loan Management > All Loans** in the left menu.

1. **Loan Management** - Open the **Loan Management** group in the menu.
2. **All Loans** - Then choose **All Loans**.

Steps

1. In the left menu, choose **Loan Management > All Loans**.
2. Use the **Search loans...** box to find a loan by loan number or by the employee's name or code.
3. Use the status dropdown (showing **All Statuses** by default) to narrow the list to one status: **Pending**, **Approved**, **Active**, **Completed**, **Rejected** or **Cancelled**.
4. Click the **Loan Number**, **Amount**, **Status** or **Start Date** column headers to sort.
5. Use the eye icon in the **Actions** column to open a loan's details. See [A loan's details](#).

What you'll see

The table has these columns:

- **Loan Number** - the system-generated reference for the loan.
- **Employee** - the borrower (avatar, name and code).
- **Amount** - the loan principal.
- **Tenure** - the repayment period in months.
- **EMI** - the equal monthly instalment.
- **Outstanding** - the amount still to be repaid.
- **Status** - a coloured badge showing where the loan is in its life cycle:
 - **Pending** - submitted and waiting for approval.
 - **Approved** - approved, but not yet disbursed.
 - **Active** - disbursed; repayments are in progress.
 - **Completed** - fully repaid or closed.
 - **Rejected** - turned down during approval.
 - **Cancelled** - withdrawn before approval finished.
- **Start Date** - the date the repayment schedule begins.
- **Actions** - view the loan; edit it (only while it is **Pending** or **Approved**); and disburse it (only while it is **Approved**).

Tips

- Loan applications go through your organization's approval workflow. Review and approve them from the **Approvals** inbox - see [Approving and disbursing a loan](#).
- Employees apply for their own loans from the self-service portal under **My loans**.

- To edit a pending or approved loan, click the pencil icon in the **Actions** column. You can change the **Amount**, **Tenure (months)**, **Start Date**, **Purpose** and **Notes**; the estimated EMI is recalculated automatically.

Requires Loan module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · create loans. Availability depends on your company's configuration.

Creating a loan

A loan starts as a request: the employee applies for it from the self-service portal, and you take over from there to approve and disburse it. The admin **All Loans** page does not have a "new loan" button - loans always begin as an employee application.

1. **Loan Management** - Open the **Loan Management** group in the menu.
2. **All Loans** - Then choose **All Loans**.

How a loan is created

1. The employee opens **My loans** in the self-service portal and chooses **Apply for Loan**.
2. They fill in the request:
 - **Amount** - the amount they want to borrow.
 - **Tenure (months)** - how many months to repay over (1 to 60).
 - **Start Date** - when the repayments should begin.
 - **Purpose** - the reason for the loan (optional).
 - **Notes** - any extra detail (optional).
 - **Security Deposits / Supporting Documents** - optionally, one or more entries. Each entry has a type (**Supporting Document**, **Blank Cheque**, **Post-Dated Cheque** or **Other**); cheque entries need a cheque number and bank name, and any entry can include an uploaded file.
3. When they submit, the request enters your organization's approval workflow and appears in **Loan Management > All Loans** with the status **Pending**.

Your part

1. Review the application in the **Approvals** inbox and approve or reject it. See [Approving and disbursing a loan](#).
2. While the loan is still **Pending** or **Approved**, you can adjust it from **All Loans**: click the pencil icon in the **Actions** column to change the **Amount**, **Tenure (months)**, **Start Date**, **Purpose** or **Notes**. The estimated EMI updates automatically.
3. Once approved, disburse the loan to activate it and create the repayment schedule. See [Approving and disbursing a loan](#).

Tips

- The EMI is the loan amount divided evenly across the tenure - there is no separate interest field.
- The loan number is generated automatically when the request is submitted.

Troubleshooting

- The admin **All Loans** page offers view, edit and disburse only - there is no "add loan" action, so every loan starts from the self-service application route described above.

Requires Loan module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · create loans for others. Availability depends on your company's configuration.

Creating a loan on behalf of an employee

In the web admin area there is no "new loan" button on the **All Loans** page - loans always start as an employee application from the self-service portal. There is no admin form that lets you pick an employee and raise a loan for them from **Loan Management > All Loans**.

1. **Loan Management** - Open the **Loan Management** group in the menu.
2. **All Loans** - Then choose **All Loans**.

What you can do instead

- Ask the employee to submit the request themselves from **My loans** in the self-service portal. Once it is in, it appears under **Loan Management > All Loans** as **Pending**, and you can approve, edit and disburse it. See [Creating a loan](#) and [Approving and disbursing a loan](#).
- While the request is **Pending** or **Approved**, you can fine-tune the **Amount**, **Tenure (months)**, **Start Date**, **Purpose** and **Notes** from the pencil icon in the **Actions** column.

Troubleshooting

- The underlying create action accepts an employee selection, but no employee picker is exposed on the web admin **All Loans** screen.

Requires Loan module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · disburse loans. Availability depends on your company's configuration.

Approving and disbursing a loan

A loan application moves through two steps before repayments begin: it is approved through your organization's approval workflow, and then it is disbursed. Disbursing the loan activates it, builds the repayment schedule and notifies the employee.

1. **Loan Management** - Open the **Loan Management** group in the menu.
2. **All Loans** - Then choose **All Loans**.
3. **Filter by Status** - Use the status dropdown to show only **Approved** loans if needed.
4. **Disburse** - In the **Actions** column, click the **bank-note** (disburse) icon on an **Approved** loan.
5. **Confirmation** - A confirmation appears showing the amount and loan number, and notes that disbursing creates the repayment schedule and notifies the employee.
6. **Disburse** - The loan activates, the repayment schedule is generated, and the employee is notified.

Approving a loan

1. When an employee submits a loan request, it appears in the **Approvals** inbox in the left menu (and under **Loan Management > All Loans** with the status **Pending**).
2. Open the request from the **Approvals** inbox, review the amount, tenure and any attached documents, and approve or reject it.
3. After approval, the loan's status changes to **Approved** on the **All Loans** page. If it is rejected, the status becomes **Rejected**.

Disbursing a loan

1. In the left menu, choose **Loan Management > All Loans**.
2. Find the loan - its status must be **Approved**. Use the status dropdown to show only **Approved** loans if needed.
3. In the **Actions** column, click the bank-note (disburse) icon.
4. A confirmation appears, showing the amount and loan number and noting that this will activate the loan, create the repayment schedule for the loan's tenure, and notify the employee.
5. Click **Disburse** to confirm.

What happens after disbursing

- The loan's status changes to **Active**.
- A repayment schedule is created with one instalment per month for the loan's tenure.
- If the loan is set to deduct from salary, monthly payroll deductions are scheduled - these appear in the [Upcoming deductions report](#).
- The employee receives a notification.

Tips

- You can still edit an **Approved** loan (amount, tenure, start date, purpose, notes) before disbursing it - use the pencil icon in the **Actions** column.
- A loan can only be disbursed once. If a schedule already exists, the disburse action is not available.

Troubleshooting

- **No disburse icon on a loan** - the loan is not in the **Approved** state, or it has already been disbursed. Only **Approved** loans can be disbursed.
- There is no separate approve button on the **All Loans** page: approval happens in the Approvals inbox, through the loan approval workflow.

Requires Loan module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view loans. Availability depends on your company's configuration.

A loan's details

The loan details panel shows everything about one loan: its summary figures, the month-by-month repayment schedule, and any security deposits or supporting documents attached to it. It opens as a slide-over from the **All Loans** page.

1. **Loan Management** - Open the **Loan Management** group in the menu.
2. **All Loans** - Then choose **All Loans**.

Steps

1. In the left menu, choose **Loan Management > All Loans**.
2. Find the loan and click the eye icon in the **Actions** column.
3. The **Loan Details** panel slides in from the right, headed by the loan number.

What you'll see

Summary - a grid showing:

- **Amount** - the loan principal.
- **EMI** - the equal monthly instalment.
- **Tenure** - the repayment period in months.
- **Outstanding** - the amount still to be repaid.
- **Status** - a coloured badge (Pending, Approved, Active, Completed, Rejected or Cancelled).
- **Start Date** - when the repayment schedule begins.

Action buttons - shown only when the loan is **Active**:

- **Log Repayment** - record a payment against the loan. See [Loan repayments](#).
- **Mark as Complete** - close the loan. See [Closing a loan](#).

Repayment Schedule - one row per scheduled month, each showing the instalment number and month, the remaining outstanding after that instalment, the EMI amount, and a status badge (for example **Pending**, **Completed**, **Verified** or **Overdue**). For loans that have not yet been disbursed, this section shows "No repayment schedule available." until disbursement creates the schedule.

Security Deposits / Documents - one row per attached deposit or document, showing the type (for example **Blank Cheque**, **Post-Dated Cheque**, **Supporting Document**), a status badge, cheque number and bank name where applicable, a link to the uploaded file with its size, and any notes. If nothing is attached it shows "No deposits or documents attached." See [Loan security deposits](#).

Tips

- You can also reach this panel directly from the **Approvals** page - opening a loan approval takes you to **All Loans** with the loan's detail panel already open.
- There is no separate repayment-history feed: the schedule rows themselves carry each month's payment status.

Requires Loan module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage security deposits. Availability depends on your company's configuration.

Loan security deposits

A loan can have one or more security deposits or supporting documents attached to it - for example a blank cheque, a post-dated cheque, or a scanned agreement. You can see them all in the loan's details panel.

1. **Loan Management** - Open the **Loan Management** group in the menu.
2. **All Loans** - Then choose **All Loans**.

Where they come from

When an employee applies for a loan in the self-service portal, they can add **Security Deposits / Supporting Documents** to the request. Each entry has a type - **Supporting Document**, **Blank Cheque**, **Post-Dated Cheque** or **Other** - and cheque entries must include a cheque number and bank name. Any entry can include an uploaded file (PDF or image).

Viewing a loan's security deposits

1. In the left menu, choose **Loan Management > All Loans**.
2. Find the loan and click the eye icon in the **Actions** column.
3. In the **Loan Details** panel, scroll to the **Security Deposits / Documents** section.
4. Each row shows the type, a status badge, the cheque number and bank name (for cheque entries), a link to download any attached file, and any notes.

Tips

- Security deposit and document records are kept for the life of the loan as part of its history.
- A deposit moves from pending to received to returned, but those transitions are not exposed as buttons in the web admin loan details panel.

Requires Loan module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage loan repayments. Availability depends on your company's configuration.

Loan repayments

When a loan is disbursed, it gets a repayment schedule with one instalment per month. As payments come in, you record them against the loan; the schedule then shows which months are paid and how much is still outstanding.

1. **Loan Management** - Open the **Loan Management** group in the menu.
2. **All Loans** - Then choose **All Loans**.

Recording a repayment

1. In the left menu, choose **Loan Management > All Loans**.
2. Find the loan - it must be **Active** - and click the eye icon in the **Actions** column.
3. In the **Loan Details** panel, click **Log Repayment**.
4. In the **Log Repayment** dialog, fill in:
 - **Amount** - the payment amount. It defaults to the next unpaid instalment's EMI.
 - **Repayment Date** - the date of the payment. It defaults to the next unpaid instalment's due date.
 - **Method** - **Bank Transfer**, **Cash**, **Cheque** or **Other**.
 - **Reference Number** - the UTR, cheque number or transaction ID (optional).
 - **Comments** - any extra detail (optional).
5. Click **Log Repayment** to save.

What happens next

- The payment is recorded against the matching month in the schedule and marked as verified, and that month's status badge changes to **Completed** (or **Verified**).
- The loan's **Outstanding** figure is reduced.
- If the loan is fully repaid, it is closed automatically and the employee is notified.

Viewing the schedule

In the **Loan Details** panel, the **Repayment Schedule** section lists every scheduled month with its instalment number, the remaining outstanding after that month, the EMI amount, and a status badge - for example **Pending** (not yet paid), **Completed** or **Verified** (paid), or **Overdue**.

Tips

- Loans set to deduct from salary are repaid through payroll; the scheduled deductions show up in the [Upcoming deductions report](#).

Troubleshooting

- **No "Log Repayment" button** - the loan is not **Active**, or you do not have permission to manage loan repayments.
- A repayment you log here is recorded as already verified. Verifying or rejecting a repayment an employee submitted from the mobile app is supported by the system but has no control in this panel.

Requires Loan module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · close loans. Availability depends on your company's configuration.

Closing a loan

Closing a loan marks it as completed - for example when the employee has settled the balance another way, or the remaining amount is being written off. A loan also closes automatically once it is fully repaid.

1. **Loan Management** - Open the **Loan Management** group in the menu.
2. **All Loans** - Then choose **All Loans**.
3. **View** - Find an **Active** loan and click the **eye** icon in the **Actions** column.
4. **Mark as Complete** - In the **Loan Details** panel, click **Mark as Complete**.
5. **Final Remark** - Required. Explain why the loan is being closed (settled, written off, etc.).
6. **Confirm Close** - The loan moves to **Closed** and the outstanding amount is cleared.

Steps

1. In the left menu, choose **Loan Management > All Loans**.
2. Find the loan - it must be **Active** - and click the eye icon in the **Actions** column.
3. In the **Loan Details** panel, click **Mark as Complete**.
4. In the **Close Loan** dialog, type a **Final Remark** explaining why the loan is being closed (for example, settled by the employee, or written off). This is required.
5. Click **Confirm Close**.

What happens next

- The loan's status changes to **Completed**.
- Your final remark is added to the loan's notes.
- The employee and the relevant administrators are notified.
- The change cannot be undone.

Tips

- You don't need to close a loan that has been fully repaid - it closes on its own once the last instalment is recorded.
- Closing is only available for **Active** loans. A loan that is still **Pending** can instead be cancelled before approval finishes.

Requires Loan module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view loan reports. Availability depends on your company's configuration.

Outstanding loans report

The **Outstanding Loans** report lists every active loan that still has a balance to be repaid. Use it to see, at a glance, who owes what. Open it from **Loan Management > Outstanding Report** in the left menu.

1. **Loan Management** - Open the **Loan Management** group in the menu.
2. **Outstanding Report** - Then choose **Outstanding Report**.

Steps

1. In the left menu, choose **Loan Management > Outstanding Report**.
2. Use the **Search loans...** box to find a loan by loan number or by the employee's name or code.
3. Click a column header to sort.

What you'll see

The report covers active loans with an outstanding balance, with these columns:

- **Loan #** - the loan reference.
- **Employee** - the borrower (avatar, name and code).
- **Loan Amount** - the original loan principal.
- **Outstanding** - the amount still to be repaid, shown in red.
- **EMI** - the equal monthly instalment.
- **Start Date** - when the repayment schedule began.
- **End Date** - when the repayment schedule is due to finish.

Tips

- Loans that are still pending or approved, and loans that have been completed or rejected, don't appear here - only active loans with a balance.
- For the full list of loans in every state, use [All Loans](#). For the deductions due in the next payroll period, use [Upcoming deductions report](#).

Requires Loan module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view loan reports. Availability depends on your company's configuration.

Upcoming deductions report

The **Upcoming Deductions** report shows the loan instalments due to be deducted from salary in the coming payroll period. Use it when preparing payroll. Open it from **Loan Management > Upcoming Deductions** in the left menu.

1. **Loan Management** - Open the **Loan Management** group in the menu.
2. **Upcoming Deductions** - Then choose **Upcoming Deductions**.

Steps

1. In the left menu, choose **Loan Management > Upcoming Deductions**.
2. Use the **Search employees...** box to find a row by loan number or by the employee's name or code.
3. Click a column header to sort.

What you'll see

The report lists active loans set to deduct from salary, with these columns:

- **Loan #** - the loan reference.
- **Employee** - the borrower (avatar, name and code).
- **Deduction Amount** - the instalment to be deducted.
- **Outstanding** - the amount still to be repaid on the loan.
- **Deduction Month** - the payroll month the deduction falls in.

Tips

- Only loans that are **Active** and set to deduct from salary appear here. Loans repaid manually don't show in this report - record those payments from the loan's details panel instead. See [Loan repayments](#).
- For a fuller view of balances across all active loans, see the [Outstanding loans report](#).

Requires Expenses module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Local expense claims

The **Expenses → Local** screen lists employees' expense requests for local travel, grouped by employee, so you can review and approve them. Open it from **Expenses → Local** in the left menu.

1. **Expenses** - Open the **Expenses** group in the menu.
2. **Local** - Then choose **Local**.

Steps

1. Open **Expenses** in the left menu and choose **Local**.
2. Review the summary cards: **Total Requests**, **Pending Approval**, **Local Travel**, and **Outstation Travel**.
3. Use the filters to narrow the list:
 - **Filter by date**
 - **Filter by user**
 - **Filter by status** - **All Statuses**, **Pending**, **Approved**, **Rejected**, **Processed**, or **Cancelled**.
 - The status tabs (**Pending**, **Approved**, **Rejected**, **All**) above the list do the same thing and show counts.
4. Click an employee row to expand their requests; click a request to expand its items.
5. Use **Expand All** / **Collapse All** to open or close every row at once.
6. Click the eye icon on a request to open it. See [An expense claim's details](#).

What you'll see

Each request row shows **Request #**, the **expense date**, a status tag, the number of items, and the total amount. Expanding a request lists each item - its expense type, description, distance (km) where relevant, item status, the claimed amount, and the approved amount if any.

Request and item statuses are: **Pending**, **Approved**, **Rejected**, **Processed**, **Hold**, and **Cancelled**.

Approving and rejecting

If you have permission:

- On a pending request, click the green check to approve or the red cross to reject. You'll be asked to confirm.
- To act on several at once, tick the checkboxes (use **Select All**, or the checkbox on an employee group), then click **Bulk Approve** or **Bulk Reject**. When bulk approving, you can tick **Force approval (bypass policy violations)**.

Tips

- The **Outstation** tab under **Expenses** shows the same screen filtered to outstation travel. See [Outstation expense claims](#).
- Open an individual request to approve, reject, or hold each item separately. See [An expense claim's details](#).

Requires Expenses module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Outstation expense claims

The **Expenses → Outstation** screen lists employees' expense requests for outstation travel. It's the same screen as [Local expense claims](#), just filtered to outstation travel - the page title reads **Outstation Expense Requests**.

1. **Expenses** - Open the **Expenses** group in the menu.
2. **Outstation** - Then choose **Outstation**.

Steps

1. Open **Expenses** in the left menu and choose **Outstation**.
2. Review, filter, expand, approve and reject requests exactly as on the Local screen. See [Local expense claims](#) for the full walkthrough - the columns, statuses, filters and bulk actions are identical.
3. Click the eye icon on a request to open it. See [An expense claim's details](#).

Tips

- The summary cards still show both **Local Travel** and **Outstation Travel** totals so you can compare at a glance.
- To see local-travel claims instead, switch to **Expenses → Local**.

Requires Expenses module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

An expense claim's details

Open an expense request to see who submitted it, every line item with its receipt, how it measures against policy, and to approve, reject or hold items or the whole request.

1. **Expenses** - Open the **Expenses** group in the menu.
2. **Local** - Then choose **Local**.

Steps

1. Open **Expenses** → **Local** or **Expenses** → **Outstation** from the left menu.
2. Click the eye icon on the request you want.
3. Review the request, then act on items or the whole request as described below.
4. Use the back arrow to return to the list.

What you'll see

At the top: the request number, when it was created, and a status tag (**Pending**, **Approved**, **Rejected**, **Processed**, **Hold**, or **Cancelled**).

- **Policy Compliance Overview** - a **Compliance Score**, an **Overall Status** (**Good**, **Fair**, or **Poor**), how many items are compliant, and the compliant amount versus the total.
- A summary with the **Employee**, **Designation**, **Expense Date**, **Total Amount**, and the employee's **Notes**.
- **Expense Items** - each item shows its expense type, an **Auto-Calculated** tag where it applies, a **Local** or **Outstation** tag, distance in km, vehicle type, the derived **From / To** addresses, the **Claimed** amount (and the per-km rate when auto-calculated), the **Approved** amount once decided, an eligibility tag (**Eligible**, **Partial**, or **Not Eligible**), any notes, and a **View Proof** link to the receipt.
- A sidebar with the **Employee** card and an **Amount Summary** - total claimed, total approved, and counts of pending, approved, rejected and on-hold items.

Approving, rejecting or holding items

If you have permission:

- On a **Pending** or **Hold** item, click **Approve** or **Reject**.
- On an **Approved** item, click **Hold** to put it back on hold.
- You'll be asked to confirm each action.

Updating the whole request

While the request is **Pending** and you have permission, use **Update Status** in the summary section to set it to **Pending**, **Approved**, or **Rejected**. This updates the overall status for all items. You'll be asked to confirm.

Tips

- Item-level actions stay available while the request is **Pending** or **Approved**.
- See [Local expense claims](#) for reviewing many requests at once, including bulk approve and reject.

Requires Announcements module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view announcements. Availability depends on your company's configuration.

Announcements

The **Announcements** screen lists the notices you've posted for the organization - either to everyone or to a particular location. Open it from **Announcements** in the left menu.

1. **Announcements** - Open **Announcements** from the menu.

Steps

1. Open **Announcements** from the left menu.
2. Use the **Search announcements...** box to find an announcement by title, description, or audience.
3. Click a column header to sort. **ID**, **Title**, **Description**, **For** and **Expiry Date** are sortable.
4. To post a new announcement, click **Add New**. See [Posting an announcement](#).
5. To change one, click the edit (pencil) icon. To remove one, click the trash icon.

What you'll see

The table has these columns:

- **ID** - the announcement number.
- **Title** - the announcement's title.
- **Description** - the message text, shortened in the list (the full text shows when you open it to edit).
- **For** - **All** if it goes to everyone, or the location name if it's targeted to one location.
- **Expiry Date** - when the announcement stops showing, or - if there's no expiry.
- **Status** - **Active** or **Inactive**.
- **Actions** - edit (if you have permission) and delete (if you have permission).

Tips

- Deleting an announcement can't be undone. You'll be asked to confirm first.

Requires Announcements module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · create announcements. Availability depends on your company's configuration.

Posting an announcement

Post a notice for the whole organization or for a single location, with an optional expiry date.

1. **Announcements** - Open **Announcements** from the menu.
2. **Add New** - Open **Announcements** from the menu and click **Add New** - the form opens.
3. **Announcement For** - Pick the audience - everyone or a single location.
4. **Title** - Required.
5. **Description** - Required. The message body.
6. **Expiry Date** - (Optional) After this date the announcement no longer shows.
7. **Create** - The announcement is published and visible to the audience you picked.

Steps

1. Open **Announcements** from the left menu and click **Add New** (the form panel opens).
2. Choose **Announcement For**:
 - **All** - everyone sees it.
 - **Location** - only that location sees it. A **Location** field appears; pick the location (required).
3. Enter the **Title** (required).
4. Enter the **Description** (required) - this is the message body.
5. Optionally pick an **Expiry Date**. After this date the announcement no longer shows.
6. Click **Create**. Use the panel close control to discard.

Who gets told

Publishing sends a notification to everyone in the audience you picked - it appears under the bell icon, is pushed to the mobile app, and is emailed if your deployment has email configured. Inactive employees and the system bot account are skipped.

Only **Create** notifies. Editing an announcement afterwards, or switching it between Active and Inactive, changes what people see on the noticeboard but does not notify anyone again.

Editing an announcement

1. On the **Announcements** list, click the edit (pencil) icon.
2. Change the audience, location, title, description, or expiry date.
3. Click **Update**.

Changing whether it's active

New announcements are **Active**. An announcement can also be **Inactive** so it stops showing without being deleted. Making one Active again does not re-notify.

Note

The create and edit form has no status control. An announcement's active or inactive state is changed from the **Status** column on the Announcements list.

Tips

- Only the location you pick will see a location-targeted announcement; switching back to **All** clears the location.
- To remove an announcement entirely, use the trash icon on the **Announcements** list. See [Announcements](#).

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Organization & master data

Master data is the set of building blocks the rest of Open Core HR relies on - departments, designations, levels, locations, shifts, holidays, expense types and policies, and document types. You set these up once (and keep them tidy over time) so that everywhere else in the app - employee records, attendance, expenses, onboarding - can refer to them.

These screens live in the left **menu** under **Settings**. Two of them sit directly under **Settings**, and the rest are grouped in a **Master Data** submenu.

What's here

Directly under **Settings**:

- **Company Details** - your organization's policy documents (employee policy, price list, and similar), each attached to a location.
- **Organization Hierarchy** - a read-only view of the org chart, reporting lines, departments, and designation levels.

Under **Settings → Master Data**:

- **Departments** - the departments in your organization, optionally arranged in a parent/child structure.
- **Designations** - job titles, each optionally tied to a department and a designation level.
- **Designation Levels** - grading levels (with default travel allowances) used by expense and travel rules.
- **Locations** - your offices and sites.
- **Shifts** - work-schedule definitions (start and end time plus working days).
- **Holidays** - public and company holidays per location, with import and bulk tools.
- **Expense Types** - the kinds of expenses people can claim (travel, food, accommodation, and so on).
- **Expense Policies** - the limits and rules that apply to each expense type, by designation or level.
- **Document Types** - the documents employees must provide (ID proof, certificates, and similar).

Note

You only see the items your role gives you access to. If something described here isn't in your menu, ask an administrator.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage company details. Availability depends on your company's configuration.

Company details

The **Company Details** screen is where you keep your organization's policy documents - things like an employee policy or an advertisement policy - as PDF files attached to a location. Open it from the left **menu** under **Settings → Company Details**.

1. **Company Details** - Open **Company Details** from the menu.

What you'll see

The page is titled **Company Details** with the note "Manage company policies and documents." Above the list are filters for **Location**, **Policy Type**, and **Status**, plus a **Reset Filters** button. The list shows these columns:

- **ID**
- **Location**
- **Policy Type** - either Employee Policy or Advertisement Policy
- **Document** - a link that opens the attached PDF in a new tab
- **Status** - **Active** or **Inactive**
- **Actions** - edit and delete

Adding a company document

1. Click **Add New**.
2. In the **Add Company Detail** panel, choose one or more entries under **Location** (you can also pick **All Locations**).
3. Choose a **Policy Type**.
4. Under **PDF Document**, select the file to upload. PDF files only, maximum 10MB.
5. Use the **Active** switch to set whether the entry is active.
6. Click **Create**. If you selected several locations, a separate entry is created for each.

Editing or removing a document

- To change an entry, click the pencil icon on its row, update the details in the **Edit Company Detail** panel - including choosing a new **PDF Document** or clicking **Remove** to clear the current file - and click **Update**.
- To delete an entry, click the delete icon and confirm in the **Delete Company Detail** dialog. This cannot be undone.

Tips

- Use the filters at the top to narrow a long list down to one location, policy type, or status.
- If a row shows no document link, no PDF has been uploaded for that entry yet - edit it to add one.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Organization hierarchy

The **Organization Hierarchy** screen gives you a read-only picture of how your organization is structured – reporting lines, departments, and designation levels. Open it from the left **menu** under **Settings → Organization Hierarchy**. It pulls everything from your employee records, departments, and designation levels, so there's nothing to edit here directly.

1. **Organization Hierarchy** – Open **Organization Hierarchy** from the menu.

What you'll see

Below the page title there's a short summary line showing the total number of **Employees**, **Departments**, and **Designation Levels**, and a search box that matches by name, code, designation, or department. Below that are four tabs:

- **Org Chart** – a bird's-eye view of the reporting structure as connected cards. Each card shows the person's avatar, name, designation, and department, with a small badge for how many direct reports they have. Use the zoom controls (top right of the chart) to zoom in or out, fit the chart to the view, or reset to 100%.
- **Reporting Tree** – an expandable, indented list of who reports to whom. Click the arrows to expand or collapse a branch. People who don't have anyone reporting to them are grouped at the bottom under **Individual Contributors**.
- **By Department** – employees grouped by department, with sub-departments nested under their parent. The person set as **Department Head** is highlighted at the top of each department.
- **By Designation Level** – employees grouped by their designation level.

Steps

1. Open **Organization Hierarchy** under **Settings**.
2. Pick the tab that matches what you want to see – the chart, the reporting tree, or a grouping by department or level.
3. Type a name, code, designation, or department in the search box to highlight matching people and trim the view to just them and their reporting line.
4. Click any person's name to open their employee profile.

Tips

- If the chart looks empty or incomplete, check that employees have a **reporting to** manager, a **department**, and a **designation level** set on their records – that's what builds this view.
- The search affects the Reporting Tree, By Department, and By Designation Level tabs.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Departments

Departments are the org units you assign people to. You can keep them as a flat list or arrange them in a parent/child structure. Open the screen from the left **menu** under **Settings → Master Data → Departments**.

1. **Master Data** - Open the **Master Data** group in the menu.
2. **Departments** - Then choose **Departments**.
3. **Add New** - Click **Add New** at the top right.
4. **Name** - Required. The department name.
5. **Code** - Required. 3 to 10 characters.
6. **Parent Department** - (Optional) Pick a parent or **No Parent** for a top-level department.
7. **Create** - Save the department - it appears in the list.
8. **Edit** - Click the **edit** (pencil) on a row to update the department.
9. **Delete** - Click the **delete** (trash) to remove a department.

What you'll see

The list shows these columns:

- **ID**
- **Name**
- **Code**
- **Parent Department**
- **Notes**
- **Status** - **Active** or **Inactive**
- **Actions** - edit and delete

Adding a department

1. Click **Add New**.
2. In the **Add Department** panel, enter a **Name**.
3. Enter a **Code** (3 to 10 characters).
4. Optionally pick a **Parent Department** - choose **No Parent** for a top-level department.
5. Optionally add **Notes**.
6. Use the **Status** switch to set whether the department is active.
7. Click **Create**.

Editing or removing a department

- Click the pencil icon on a row to open the **Edit Department** panel, make your changes, and click **Update**. When editing, the department itself and any departments beneath it won't appear in the **Parent Department** list (so you can't create a loop).
- Click the delete icon and confirm in the **Delete Department** dialog to remove it. This cannot be undone.

Tips

- Use the search box above the list to find a department by name or code.
- A department's place in the parent/child structure is what builds the **By Department** view on the Organization Hierarchy screen.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Designations

Designations are the job titles you assign to employees - for example "Sales Executive" or "HR Manager". Each one can be linked to a department and a designation level. Open the screen from the left **menu** under **Settings → Master Data → Designations**.

1. **Master Data** - Open the **Master Data** group in the menu.
2. **Designations** - Then choose **Designations**.
3. **Add New** - Click **Add New** at the top right.
4. **Name** - Required. The designation name (e.g. **Senior Engineer**).
5. **Department** - Pick the department this designation belongs to.
6. **Save** - Save the designation.
7. **Edit** - Click the **edit** (pencil) on a row to update the designation.

What you'll see

The list shows these columns:

- **Id**
- **Name**
- **Code**
- **Department**
- **Level** - the designation level, or **N/A** if none is set
- **KYC - Enabled** or **Disabled**
- **Status - Active** or **Inactive**
- **Actions** - edit and delete

Adding a designation

1. Click **Add New**.
2. In the **Add Designation** panel, enter a **Name** and a **Code**.
3. Optionally choose a **Department**.
4. Optionally choose a **Designation Level**.
5. Optionally add **Notes**.
6. Use the **KYC Enabled** switch if people with this designation need to complete KYC.
7. Use the **Status** switch to set whether the designation is active.
8. Click **Save**.

Editing or removing a designation

- Click the pencil icon on a row to open the **Edit Designation** panel, make your changes, and click **Update**.
- Click the delete icon and confirm in the dialog ("This will permanently delete the designation") to remove it.

Tips

- The **Designation Level** you pick here is what drives travel and expense rules tied to levels - see [Designation levels](#) and [Expense policies](#).
- Use the search box above the list to find a designation by name or code.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Designation levels

Designation levels are grading bands - for example "Junior", "Senior", or "Manager" - used to rank designations and to set default travel allowances. Expense policies can target a level instead of a single designation. Open the screen from the left **menu** under **Settings → Master Data → Designation Levels**.

1. **Master Data** - Open the **Master Data** group in the menu.
2. **Designation Levels** - Then choose **Designation Levels**.

What you'll see

The page note reads "Manage designation levels and their travel policies." The list shows these columns:

- **Name**
- **Code**
- **Display Name**
- **Priority** - lower numbers rank higher in the hierarchy
- **Status** - **Active** or **Inactive**
- **Actions** - view, edit, and delete

Clicking the view (eye) icon opens a **View Designation Level** dialog showing the name, code, display name, priority, description, the default **Mileage Rate**, **Food Allowance**, **Boarding Limit**, **Train Class**, and **AC Tier**, the **Designations Count** (how many designations use this level), and the status.

Adding a designation level

1. Click **Add New**.
2. In the **Add Designation Level** panel, enter a **Name**, a **Code** (unique), and a **Display Name**.
3. Set a **Priority** (a whole number, 1 or higher).
4. Optionally add a **Description**.
5. Optionally fill in the default travel values: **Mileage Rate**, **Food Allowance**, **Boarding Limit**, **Train Class** (for example "2S" or "SL"), and **AC Tier** (1, 2, or 3).
6. Use the **Active** switch to set whether the level is active.
7. Click **Create**.

Editing or removing a designation level

- Click the pencil icon (or **Edit** inside the view dialog) to open the **Edit Designation Level** panel, make your changes, and click **Update**.
- Click the delete icon and confirm in the **Delete Designation Level** dialog to remove it.

Tips

- The default travel values here act as a baseline for that level; more specific limits are set in [Expense policies](#).
- Use the search box above the list to find a level by name or code.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Locations

Locations are your offices and sites. They're used in other parts of the app - for example holidays are set per location, and company policy documents are attached to a location. Open the screen from the left **menu** under **Settings → Master Data → Locations**.

1. **Master Data** - Open the **Master Data** group in the menu.
2. **Locations** - Then choose **Locations**.

What you'll see

The list shows these columns:

- **Id**
- **Name**
- **Code**
- **Notes**
- **Status** - **Active** or **Inactive**
- **Actions** - edit and delete

Adding a location

1. Click **Add New**.
2. In the **Add Location** panel, enter a **Name**.
3. Enter a **Code** (up to 10 characters; it should be unique).
4. Optionally add **Notes** and an **Address**.
5. Use the **Status** switch to set whether the location is active.
6. Click **Save**.

Editing or removing a location

- Click the pencil icon on a row to open the **Edit Location** panel, make your changes, and click **Update**.
- Click the delete icon and confirm in the dialog ("This will permanently delete the location") to remove it.

Tips

- Use the search box above the list to find a location by name or code.
- Keep codes short and consistent - they show up alongside the location name in other screens, such as the **Location** picker on the Holidays screen.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Shifts

A shift is a work-schedule definition - a start time, an end time, and the days of the week it runs. Open the screen from the left **menu** under **Settings → Master Data → Shifts**.

1. **Master Data** - Open the **Master Data** group in the menu.
2. **Shifts** - Then choose **Shifts**.

What you'll see

The list shows these columns:

- **ID**
- **Name**
- **Code**
- **Working Days** - small badges for **Sun** through **Sat**; the days included in the shift are highlighted
- **Status** - **Active** or **Inactive**
- **Actions** - edit and delete

Adding a shift

1. Click **Add New**.
2. In the **Add Shift** panel, enter a **Name**. The **Code** is generated for you automatically.
3. Optionally add **Notes**.
4. Set the **Start Time** and **End Time**.
5. Under **Working Days**, tick the days this shift runs (**Sun** through **Sat**).
6. Use the **Status** switch to set whether the shift is active.
7. Click **Create**.

Editing or removing a shift

- Click the pencil icon on a row to open the **Edit Shift** panel, change the details (you can edit the **Code** here), and click **Update**.
- Click the delete icon and confirm in the **Delete Shift** dialog to remove it. This cannot be undone.

Tips

- Use the search box above the list to find a shift by name or code.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Holidays

The **Holidays** screen is where you record public and company holidays for each location. Open it from the left **menu** under **Settings → Master Data → Holidays**.

1. **Master Data** - Open the **Master Data** group in the menu.
2. **Holidays** - Then choose **Holidays**.
3. **Add Holiday** - Click **Add Holiday** at the top right.
4. **Name** - Required. The holiday name (e.g. **Independence Day**).
5. **Date** - The holiday date.
6. **Location** - Pick a location, or **All Locations** to add it everywhere at once.
7. **Status** - **Active** or **Inactive**.
8. **Create** - Save the holiday.
9. **Download Sample** - Get a sample spreadsheet showing the expected format.
10. **Import** - Pick the filled file (Excel or CSV) - the new holidays appear once the import finishes.
11. **Edit** - Click the **pencil** to open the **Edit Holiday** panel.
12. **Delete** - Click the **trash** to remove a holiday (confirms in a dialog).

What you'll see

A **Year** filter sits above a row of location tabs - **All Locations** plus one tab per location - so you can narrow the list to a single year and location. The list shows these columns:

- A checkbox (for selecting rows for bulk actions)
- **Name**
- **Date** - with the weekday shown underneath
- **Code**
- **Notes**
- **Status** - **Active** or **Inactive**
- **Actions** - edit and delete

Adding a holiday

1. Click **Add Holiday**.
2. In the **Add Holiday** panel, enter a **Name**.
3. Pick the **Date**.
4. Choose a **Location** - or pick **All Locations** to add the holiday to every location at once.
5. Set the **Status** to **Active** or **Inactive**.
6. Optionally add **Notes**.
7. Click **Create**.

Editing or removing a holiday

- Click the pencil icon on a row to open the **Edit Holiday** panel, make your changes, and click **Update**.
- Click the delete icon and confirm in the **Delete Holiday** dialog to remove it. This cannot be undone.

Importing holidays

1. Click **Download Sample** to get a sample spreadsheet showing the format expected.
2. Fill in your holidays in that file.
3. Click **Import** and choose the file (Excel or CSV). The new holidays appear in the list once the import finishes.

Bulk actions

1. Tick the checkboxes for the holidays you want to act on (the header checkbox selects everything on the current page).
2. Click **Bulk Actions** (the number in brackets is how many rows you've selected).
3. Choose **Activate Selected**, **Deactivate Selected**, or **Delete Selected**. For a delete, confirm in the **Delete Selected Holidays** dialog.

Tips

- Use the **Year** filter and the location tabs together to find a specific year's holidays for one site.
- Use the search box above the list to find a holiday by name.

Requires Documents module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view document types. Availability depends on your company's configuration.

Document types

Document types are the kinds of documents employees are expected to provide - ID proof, certificates, contracts, and similar. They're used in employee records and during onboarding. Open the screen from the left **menu** under **Settings → Master Data → Document Types**.

1. **Master Data** - Open the **Master Data** group in the menu.
2. **Document Types** - Then choose **Document Types**.

What you'll see

The page note reads "Manage document types for employee records." The list shows these columns:

- **ID**
- **Name**
- **Code**
- **Notes**
- **Status** - **Active** or **Inactive**
- **Actions** - edit and delete

Adding a document type

1. Click **Add New**.
2. In the **Add Document Type** panel, enter a **Name**. The **Code** is generated for you automatically (you can change it if you need to).
3. Optionally add **Notes**.
4. Turn on **Mark as critical** if this document should be flagged for HR follow-up reports. Note that candidates are expected to upload every active document type regardless of this setting.
5. Use the **Active** switch to set whether the type is in use. Inactive document types are hidden from new onboarding submissions.
6. Click **Create**.

Editing or removing a document type

- Click the pencil icon on a row to open the **Edit Document Type** panel, make your changes, and click **Update**.
- Click the delete icon and confirm in the **Delete Document Type** dialog to remove it. This cannot be undone.

Tips

- Turning a type off (Active switch) keeps it on existing records but stops it appearing in new onboarding - useful for retiring a document you no longer collect.
- Use the search box above the list to find a document type by name or code.

Note

Document types carry no expiry date. The form holds Name, Code, Notes, **Mark as critical** and Active only.

Requires Expenses module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Expense types

Expense types are the kinds of expenses people can claim - travel, food, accommodation, transport, and so on. Each type carries a few settings that shape how a claim of that type behaves, and the actual limits and rules are layered on top through [Expense policies](#). Open the screen from the left **menu** under **Settings → Master Data → Expense Types**.

1. **Master Data** - Open the **Master Data** group in the menu.
2. **Expense Types** - Then choose **Expense Types**.
3. **Add Expense Type** - Click **Add Expense Type** at the top right.
4. **Name** - Required. The expense type (e.g. **Travel**, **Meals**).
5. **Category** - Required. The category - Travel, Allowance, Reimbursement, etc.
6. **Save** - Save the new expense type.
7. **Edit** - Click the **pencil** to update the expense type.
8. **Delete** - Click the **trash** to remove the type.

What you'll see

The list shows these columns:

- **ID**
- **Name**
- **Code**
- **Category** - Travel, Food, Accommodation, Transport, Other, or **N/A**
- **Proof Required** - **Required** or **Not Required**
- **Policies** - how many expense policies are attached to this type
- **Status** - **Active** or **Inactive**
- **Actions** - view, edit, and delete

Adding an expense type

1. Click **Add New**.
2. In the **Add Expense Type** panel, enter a **Name**. The **Code** is generated for you automatically and can't be changed.
3. Choose a **Category** (Travel, Food, Accommodation, Transport, or Other).
4. Choose a **Type** - **Local** or **Outstation**.
5. Optionally choose a **Vehicle Type** (Bike, Car, Auto, Bus, or Bicycle).
6. Optionally set a **Display Order** (controls where this type appears in lists).
7. Turn on **Proof Required** if claims of this type must include a receipt or other proof.
8. Turn on **Distance Based** if this type is calculated from distance travelled (for example a mileage claim).
9. Optionally add **Notes**.
10. Use the **Status** switch to set whether the type is active.

11. Click **Create**. After saving, set the limits and rules for the type in [Expense Policies](#).

Viewing an expense type

Click the view (eye) icon on a row to open the **Expense Type Details** panel. There's also a full details page that shows the type's settings - **Name**, **Code**, **Category**, **Travel Type**, **Vehicle Type**, **Proof Required**, **Distance Based**, **Display Order**, and **Notes** - along with a **Related Expense Policies** section listing the active policies and a link through to **Expense Policies**.

Editing or removing an expense type

- Click the pencil icon on a row to open the **Edit Expense Type** panel, make your changes, and click **Update**.
- Click the delete icon and confirm in the **Delete Expense Type** dialog to remove it. This cannot be undone.

How a type drives expense behaviour

- **Category** and **Type** (Local / Outstation) classify the claim.
- **Proof Required** decides whether the person must attach proof when claiming.
- **Distance Based** (or having a **Vehicle Type**) makes the claim distance-driven - and on the matching expense policy you'll then be asked for a **Min Distance** and **Max Distance** band.
- The amount limits themselves don't live here - they're on the [expense policies](#) attached to the type.

Tips

- Use the search box above the list to find an expense type by name or code.

Requires Expenses module

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager. Availability depends on your company's configuration.

Expense policies

Expense policies are the rules that sit on top of [expense types](#) - they set the value or limit for a type, who it applies to (everyone, a designation level, or a single designation), and, for distance-based types, the distance band it covers. Open the screen from the left **menu** under **Settings → Master Data → Expense Policies**.

1. **Master Data** - Open the **Master Data** group in the menu.
2. **Expense Policies** - Then choose **Expense Policies**.
3. **Add Policy** - Click **Add Policy** at the top right.
4. **Expense Type** - Required. The expense type this policy applies to.
5. **Designation Level** - (Optional) The designation level the policy applies to.
6. **Value** - Required. The limit value for this policy.
7. **Save** - Save the policy.
8. **Edit** - Click the **pencil** to update the policy.
9. **Delete** - Click the **trash** to remove the policy.

What you'll see

Above the list is a **Filter by expense type** dropdown (with **All Expense Types** as the default). The list shows these columns:

- **ID**
- **Expense Type** - the type name and code
- **Designation Level** - the level it applies to, or **Global** if it applies to everyone
- **Unit** - for example "km" or "day"
- **Min Distance**
- **Max Distance**
- **Value** - shown as a currency amount
- **Priority** - when more than one policy could match, the one with the right priority wins
- **Status** - **Active** or **Inactive**
- **Actions** - edit and delete

Adding an expense policy

1. Click **Add New**.
2. Choose the **Expense Type** this policy is for.
3. Choose who it applies to. Either pick a **Designation Level** (or leave it as **Global (All Levels)**), or pick a **Specific Designation**. Choosing one clears the other - a policy targets a level or a single designation, not both.
4. Enter the **Value** for the policy.
5. Optionally enter a **Max Amount** (a cap).
6. Optionally enter a **Unit** (for example "km" or "day").

7. Set a **Priority** (1 to 100).
8. If the expense type is distance-based, enter the **Min Distance** and **Max Distance** (in km) for the band this policy covers.
9. Optionally add a **Description**.
10. Use the **Active** switch to set whether the policy is in effect.
11. Click **Create** (or **Create Policy** on the full-page form).

Editing or removing an expense policy

- Click the pencil icon on a row to open the **Edit Expense Policy** panel, make your changes, and click **Update**.
- Click the delete icon and confirm in the **Delete Expense Policy** dialog to remove it. This cannot be undone.

How policies are applied

- A policy is matched to a claim by its **Expense Type** and by who it applies to - a **Designation Level** policy covers everyone at that level; a **Specific Designation** policy covers just that designation; a **Global** policy covers everyone.
- For distance-based types, the **Min Distance** and **Max Distance** decide which policy covers a given trip length.
- When several policies could apply, **Priority** decides which one is used.

Tips

- Use the **Filter by expense type** dropdown to see only the policies for one type while you're tuning it.
- Set up your designation levels first (see [Designation levels](#)) - level-based policies are usually less work to maintain than one policy per designation.
- Use the search box above the list to find a policy.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage settings · view settings. Availability depends on your company's configuration.

Settings

The **Settings** screen is where you manage company-wide options for the whole workspace. Open it from the **gear icon** in the top bar of the admin side.

1. **Settings** - Click the **Settings** gear at the top right of the page.

What you'll see

The page is titled **Settings** with the note "Manage your application settings." Options are split across five tabs:

- **General** - company information (legal business name, address, phone, email), the two **Attendance** check-in rules, and the **Letter Signatory** (name, designation, and signature image used on generated lifecycle letters).
- **Localisation** - the currency, timezone, date and time formats, distance unit and dialling code the whole system reads.
- **Code Prefix** - the prefixes used to build codes for employees, shifts, holidays, expense types and document types.
- **Recruitment** - the HR notification email addresses for new applications, and the re-apply cooldown in days.
- **Mobile App** - minimum app versions and force-update options for iOS and Android, plus maintenance mode and its message.

Each tab has its own **Save Changes** button, so you save one tab at a time.

Tips

- If your role doesn't allow managing settings, you may be able to view this screen but not save changes.
- Some helper notes only appear on the screen if helper text is enabled for your workspace.

See also

- [General settings](#)
- [Localisation settings](#)
- [Code prefixes](#)
- [App update settings](#)
- [Authorized signature](#)

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage settings. Availability depends on your company's configuration.

General settings

The **General** tab on the **Settings** screen holds your company details, the automatic check-out time, and the signatory used on generated letters. Open Settings from the **gear icon** in the top bar, then stay on the **General** tab.

1. **Settings** - Click the **Settings** gear at the top right of the page.

What you can set

Company Information

- **Legal Business Name**
- **Phone**
- **Email**
- **Address**

These appear on generated lifecycle letters and in the header and footer of emails Open Core HR sends.

Attendance

- **Only allow registered devices** - refuse a check-in from a phone the employee has not registered.
- **Block check-in until documents are uploaded** - stop an employee checking in while a mandatory document is still missing.

Letter Signatory

- **Signatory Name** and **Signatory Designation** - the name and title printed on generated lifecycle letters (offer, appointment, confirmation, increment, warning, relieving) and shown on the candidate offer-acceptance page.
- **Signature Image** - the signature picture. See [Authorized signature](#) for how to upload it.

Steps

1. Open **Settings** from the **gear icon** in the top bar.
2. Stay on the **General** tab.
3. Update the fields you need.
4. Click **Save Changes** at the bottom of the tab.

Tips

- The company details here feed into generated documents and letters, so keep them accurate.
- The Letter Signatory name and designation are typed in here; the signature image is uploaded separately (the file picker on this tab handles it).

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage settings. Availability depends on your company's configuration.

Code prefixes

The **Code Prefix** tab on the **Settings** screen sets the text at the start of the codes Open Core HR generates. Open Settings from the **gear icon** in the top bar, then choose the **Code Prefix** tab.

What you can set

There is a prefix for each kind of record Open Core HR generates a code for:

- **Employee** - used for employee codes, e.g. EMP-0001
- **Shift**
- **Holiday**
- **Expense Type**
- **Document Type**

When you create one of these records, its code is built from the matching prefix. Records Open Core HR does not generate a code for - leave types, departments, designations, locations - have no prefix, because you name their codes yourself.

Steps

1. Open **Settings** from the **gear icon** in the top bar.
2. Open the **Code Prefix** tab.
3. Type the prefix you want in each field.
4. Click **Save Changes**.

Tips

- Changing a prefix affects codes generated from then on; it doesn't rename codes that already exist.
- Keep prefixes short and consistent so codes stay easy to read.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage settings. Availability depends on your company's configuration.

Localisation settings

The **Localisation** tab on the **Settings** screen sets the currency, timezone, date and time formats, distance unit and dialling code that the whole of Open Core HR reads. Open Settings from the **gear icon** in the top bar, then choose the **Localisation** tab.

1. **Settings** - Click the **Settings** gear at the top right of the page.

Open Core HR ships without a country built in, so these are the values every screen, report, letter and export uses. Set them once when you first install.

What you can set

Currency

- **Currency Code** - the three-letter ISO 4217 code, for example AED, SAR, INR or USD.
- **Currency Symbol** - the symbol shown in front of amounts. A preview underneath shows a sample amount as it will appear.

Time

- **Timezone** - attendance timestamps, report boundaries and scheduled jobs are all read in this zone.
- **Date Format, Time Format, Date & Time Format** - written as PHP date tokens (for example `d-m-Y` and `h:i A`). Each field shows a live preview of a sample date so you can check the format before saving.

Other

- **Distance Unit** - kilometres or miles. Mileage claims store a plain number; this setting is what that number means. Changing it relabels existing claims rather than converting them, so pick it before people start claiming.
- **Dialling Code** - shown alongside phone fields, for example `+971`. Leave it blank to hide it.

Steps

1. Open **Settings** from the **gear icon** in the top bar.
2. Choose the **Localisation** tab on the left.
3. Update the fields you need, checking the preview under each one.
4. Click **Save Changes**.

Tips

- The previews update as you type, so you can try a date format and see the result before saving.
- Currency and distance are read everywhere - expense claims, reports, exports and generated letters - so a change here is visible across the whole system straight away.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage settings. Availability depends on your company's configuration.

App update settings

The **Mobile App** tab on the **Settings** screen controls the minimum mobile-app version employees must be on, whether updating is mandatory, and an overall maintenance mode for the app. Open Settings from the **gear icon** in the top bar, then choose the **Mobile App** tab.

1. **Settings** - Click the **Settings** gear at the top right of the page.

What you can set

iOS Settings

- **Minimum Version** (required) - the lowest iOS app version allowed, in the form X.Y.Z (for example, 1.2.0).
- **App Store URL** - the link employees are sent to in order to update.
- **Force Update** - when on, employees on an older version can't use the app until they update.

Android Settings

- **Minimum Version** (required) - the lowest Android app version allowed, in the form X.Y.Z.
- **Play Store URL** - the update link for Android.
- **Force Update** - same as for iOS.

Maintenance Mode

- **Enable Maintenance Mode** - when on, all app access is blocked.
- **Maintenance Message** - the message shown to employees while maintenance mode is on.

The screen includes a short "How it works" note explaining these options.

Steps

1. Open **Settings** from the **gear icon** in the top bar.
2. Open the **Mobile App** tab.
3. Set the minimum versions, store links, and force-update switches for iOS and Android.
4. If you need to take the app offline, turn on **Enable Maintenance Mode** and write a **Maintenance Message**.
5. Click **Save Changes**.

Tips

- Use **Force Update** sparingly - it locks employees out of the mobile app until they update.
- Turn maintenance mode back off as soon as the work is done so employees can use the app again.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage settings. Availability depends on your company's configuration.

Authorized signature

The authorized signature is the signature image printed on generated lifecycle letters (offer, appointment, confirmation, increment, warning, relieving) and shown on the candidate offer-acceptance page. You upload it in the **Letter Signatory** section of the **General** tab on the **Settings** screen.

1. **Settings** - Click the **Settings** gear at the top right of the page.

There isn't a separate tab for this - it lives alongside the **Signatory Name** and **Signatory Designation** fields on the **General** tab.

Steps

1. Open **Settings** from the **gear icon** in the top bar.
2. Stay on the **General** tab and scroll to **Letter Signatory**.
3. (Optional) Fill in **Signatory Name** and **Signatory Designation**.
4. Under **Signature Image**, click **Upload** (or **Replace** if a signature is already there).
5. Choose a PNG or JPG image. A PNG with a transparent background works best, and the file must be 2 MB or smaller.

The signature uploads on its own - you don't need to press **Save Changes** for the image (that button saves the other General fields, including the signatory name and designation).

What you'll see

- Before any upload: "No signature uploaded yet."
- After upload: the current signature image with the label "Current signature", and the button changes to **Replace**.

Tips

- Use a clean scan or export of the signature on a transparent background so it sits well on letter templates.
- The signatory name and designation are typed in separately and saved with the rest of the General tab.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view roles. Availability depends on your company's configuration.

Roles and permissions

The **Roles & Permissions** screen lists every role in the workspace and lets you see - and change - exactly what each role can do. Open it from **Roles & Permissions** in the left **menu**, under the Settings heading.

1. **Roles & Permissions** - Open **Roles & Permissions** from the menu.

What you'll see

A list of role cards. Each card shows:

- The role name.
- A **Built-in** badge for roles that ship with Open Core HR (these can't be deleted).
- An **All Permissions** badge on the Super Admin role.
- How many users have the role, and how many permissions it has.
- A **pencil** button to open the full edit screen, and (for non-built-in roles) a **trash** button to delete it.

Click a role card to expand it and see its permissions, grouped by feature (for example, Employees, Attendance, Leave). Each group has a count like 3/8 showing how many permissions in that group are turned on.

Changing what a role can do

On an expanded role card:

1. Click **Roles & Permissions** in the left **menu**.
2. Click the role to expand it.
3. Tick or untick individual permissions, or tick a group's checkbox to turn all of its permissions on or off.
4. Changes save automatically - a **Saving...** badge appears on the role while it saves, and a message confirms when it's done.

For larger changes (including renaming the role and its app-access switches), use the **pencil** button to open the full edit screen - see [Creating and editing a role](#).

Notes

- **Super Admin** always has every permission. Its permissions can't be changed - the expanded card says so.
- Whether you can add, edit, delete roles, or change their permissions depends on your own role.
- To delete a role, it must have no users assigned. If it does, the confirmation dialog tells you to reassign those users first.

See also

- [Creating and editing a role](#)
- [Giving an individual extra permissions](#)

Requires OrganizationApps module

▼ Roles & permissions

super admin. Availability depends on your company's configuration.

Organization apps

The **Organization Apps** screen is where you register other company apps so people can open them and sign in through Open Core HR. Registered apps can also appear in the app switcher. Open it from **Organization Apps** in the left **menu**, under the Settings heading. This screen is for super admins only.

1. **Organization Apps** - Open **Organization Apps** from the menu.

What you'll see

A table of registered apps with these columns:

- **ID**
- **Name**
- **Slug** - the short identifier for the app.
- **URL** - the app's web address.
- **Color** - the colour swatch used for the app.
- **Status** - **Active** or **Inactive**.
- **Sort Order** - the position used when the app is listed.
- **Actions** - a **pencil** button to edit, and a **trash** button to remove the app.

Use the **search box** above the table to filter.

Adding an app

1. Open **Organization Apps** from the left **menu**.
2. Click **Add App**.
3. In the panel that slides in, fill in:
 - **Name** (required) - the slug is filled in for you from the name, but you can change it.
 - **Slug** (required)
 - **Description** (optional)
 - **URL** (required) - the app's address.
 - **Color** - pick a colour or enter a hex value.
 - **Sort Order**
 - **Active** - whether the app is enabled.
 - **Visible** - whether the app shows in the app switcher.
4. Click **Create**.
5. A dialog titled **OAuth Client Created** shows the new app's **Client ID** and **Client Secret**. Copy both now - the secret won't be shown again. Use the copy buttons next to each value, then click **Done**.

These credentials are what the other app uses to connect to Open Core HR for sign-in.

Editing an app

1. Click the **pencil** button on the app's row.

2. Change the details in the slide-in panel.
3. Click **Update**.

Removing an app

1. Click the **trash** button on the app's row.
2. Confirm in the **Delete App** dialog. The app's sign-in connection is removed as well, and this can't be undone.

Tips

- Save the Client ID and Client Secret somewhere safe when you create an app - there's no way to see the secret again afterwards.
- Turn an app **Inactive** or **Visible: off** if you want to keep it registered but not have people use it or see it in the switcher.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · create roles. Availability depends on your company's configuration.

Creating and editing a role

Roles are added and changed from the **Roles & Permissions** screen (in the left **menu**, under Settings). Creating or editing a role opens a full-page form.

1. **Roles & Permissions** - Open **Roles & Permissions** from the menu.
2. **Add Role** - Click **Add Role** to open the create page.
3. **Role Name** - Required. The name of the new role.
4. **Permissions** - Tick the permissions this role should have - use **Select All** or **Select None** to bulk-toggle.
5. **Create Role** - Save the role. It appears on **Roles & Permissions**.
6. **Edit** - On **Roles & Permissions**, click the **pencil** button on the role's card to open **Edit Role**.

Adding a role

1. Open **Roles & Permissions** from the left **menu**.
2. Click **Add Role**.
3. On the **Create Role** page, enter a **Role Name** (required).
4. Set the role's access switches as needed:
 - **Multiple Check-in**
 - **Mobile App Access**
 - **Web App Access**
 - **Location Tracking**
 - **Self Service Access**
5. Under **Permissions**, tick the permissions this role should have. You can:
 - Use the **Search permissions...** box to find a permission.
 - Tick a group heading to select or clear that whole group.
 - Use **Select All** or **Deselect All**.
6. Click **Create Role**.

Editing a role

1. On **Roles & Permissions**, click the **pencil** button on the role's card.
2. On the **Edit Role** page, change the **Role Name**, the access switches, or the ticked permissions.
3. Click **Update Role**.

For quick permission tweaks you can also expand the role card on the **Roles & Permissions** list and tick permissions there, without opening the edit page.

Deleting a role

1. On **Roles & Permissions**, click the **trash** button on the role's card. (Built-in roles don't have this button.)
2. Confirm in the **Delete Role** dialog.

A role can only be deleted if no users are assigned to it - if users are still on it, the dialog tells you to reassign them first.

Assigning a role to an employee

You don't assign roles from this screen. A person's role is set on their employee record:

- When you add an employee, pick a **Role** in the add-employee form (it's required).
- For an existing employee, open their profile and change the **Role** in the work information section.

Notes

- **Super Admin** always has every permission; ticking or unticking permissions for it has no effect, and the edit page says so.
- The access switches (mobile, web, self-service, etc.) control which parts of Open Core HR people with the role can use.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · manage employee permissions. Availability depends on your company's configuration.

Giving an individual extra permissions

In Open Core HR, what a person can do is decided by their **role**. There isn't a separate screen in the current app for granting one individual extra permissions on top of their role. To change what someone can access, you either move them to a different role or adjust the permissions on the role itself.

1. **Roles & Permissions** - Open **Roles & Permissions** from the menu.

How to change one person's access

Pick whichever fits:

- **Move the person to a different role** - open their employee profile and change the **Role** in the work information section. They immediately get whatever that role allows. Use this when an existing role already matches the access they need.
- **Create a role for the access you want** - on the **Roles & Permissions** screen, click **Add Role**, tick exactly the permissions needed, and assign that role to the person. Use this when no existing role fits. See [Creating and editing a role](#).
- **Adjust an existing role's permissions** - on **Roles & Permissions**, expand the role and tick or untick permissions. Remember this affects *everyone* with that role, not just one person.

See also

- [Roles and permissions](#)
- [Creating and editing a role](#)

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view audit logs. Availability depends on your company's configuration.

Audit logs

The **Audit Logs** screen is the system activity trail - a record of who changed what, and when. Open it from **Audit Logs** in the left **menu**, under the Settings heading.

1. **Audit Logs** - Open **Audit Logs** from the menu.

What you'll see

A table of audit entries with these columns:

- **ID** - the entry number.
- **User** - the person who made the change (or "System" if it wasn't a person).
- **Model** - the type of record that changed, shown as a badge.
- **Event** - what happened: **Created**, **Updated**, or **Deleted** (shown as a coloured badge).
- **IP Address** - where the change came from, if recorded.
- **Date** - when it happened.
- **Actions** - a **view** (eye) button to open the full entry.

Use the **search box** above the table to filter, and click a column header to sort by it.

Opening an entry

Click the **view** (eye) button on a row to open **Audit Log Details**. That page shows:

- **Overview** - the user (name and email), the **Event**, the **Model** and **Record ID**, plus the **Timestamp**, **IP Address**, **User Agent**, **URL**, and **Tags** when those were recorded.
- **Changes** - a table with **Field**, **Old Value**, and **New Value** columns. Fields that actually changed are highlighted (old value in red, new value in green). If the event didn't record any field changes, it says "No changes recorded for this event."

Use the back arrow at the top of the details page to return to the list.

Tips

- Audit entries are read-only - you can view them but not edit or remove them from here.
- Use the search box to narrow down to a person, a record type, or a date you're looking for.

▼ Roles & permissions

admin · super admin · hr admin · hr manager · accounts · Human Resource manager · view pending greetings. Availability depends on your company's configuration.

Pending greetings

The **Pending Greetings** screen holds greeting messages that are waiting for someone to approve before they're posted - for example, birthday or work-anniversary greetings. Open it from **Pending Greetings** in the left **menu**, under the Settings heading.

1. **Pending Greetings** - Open **Pending Greetings** from the menu.

What you'll see

A table of greetings waiting for review, with these columns:

- A **checkbox** for selecting greetings (only shown if you can approve them).
- **Employee** - who the greeting is for.
- **Type** - the kind of greeting, shown as a badge.
- **Content** - the greeting text.
- **Event Date** - the date the greeting relates to.
- **Created** - when the greeting was queued.
- **Actions** - an **approve** (tick) button and a **reject** (cross) button (only if you can approve).

If there's nothing waiting, the screen says "No pending greetings to review."

Approving a greeting

1. Open **Pending Greetings** from the left **menu**.
2. Click the **approve** (tick) button on the greeting's row. It's posted and removed from the list.

To approve several at once, tick their checkboxes, then click **Approve Selected (n)** at the top of the screen.

Rejecting a greeting

1. Click the **reject** (cross) button on the greeting's row.
2. In the **Reject Greeting** dialog, type a **Rejection Reason** (required).
3. Click **Reject**.

Notes

- The approve and reject controls only appear if your role allows approving greetings; otherwise you can view the queue but not act on it.

▼ Roles & permissions

super admin. Availability depends on your company's configuration.

External API clients

The **External API Clients** screen is where you set up connections that let another system exchange data with Open Core HR - for example, to keep records in sync or send updates when something changes. Each connection gets its own access token. Open it from **External API Clients** in the left **menu**, under the Settings heading. This screen is for super admins only.

1. **External API Clients** - Open **External API Clients** from the menu.

What you'll see

A table of connections with these columns:

- **ID**
- **Name**
- **Code** - the short identifier for the connection.
- **Status** - **Active** or **Inactive**.
- **Tokens** - how many access tokens the connection has.
- **Last Sync** - when the other system last exchanged data, if recorded.
- **Actions** - a **pencil** button to edit, a **key** button to generate a token, and a **trash** button to remove the connection.

Use the **search box** above the table to filter.

Adding a connection

1. Open **External API Clients** from the left **menu**.
2. Click **Add Client**.
3. In the panel that slides in, fill in:
 - **Name** (required)
 - **Code** (required) - the short identifier.
 - **Contact Email** (optional) - who to contact about this connection.
 - **Description** (optional)
 - **Active** - whether the connection is enabled.
4. Click **Create**.

Generating an access token

1. On the connection's row, click the **key** button.
2. A dialog titled **API Token Generated** shows the token. Copy it now - it won't be shown again. Use the copy button, then click **Done**.
3. Give the token to whoever is setting up the other system.

Editing a connection

1. Click the **pencil** button on the connection's row.
2. Change the details in the slide-in panel.

3. Click **Update**.

Removing a connection

1. Click the **trash** button on the connection's row.
2. Confirm in the **Delete Client** dialog. All of the connection's tokens stop working, and this can't be undone.

Tips

- Treat the token like a password - anyone who has it can connect to Open Core HR as that connection. Copy it somewhere safe when you generate it; there's no way to see it again.
- Set a connection to **Inactive** to pause it without deleting it.

[Requires Microsoft365 module](#)

▼ Roles & permissions

super admin. Availability depends on your company's configuration.

Microsoft 365

The **Microsoft 365** screen is the overview of how Open Core HR employee accounts line up with Microsoft 365 accounts. It shows how many employees are linked, who still needs an account, and which accounts have been disabled. Open it from **Microsoft 365** in the left **menu**, under the Settings heading. This screen is for super admins only.

1. **Microsoft 365** - Open **Microsoft 365** from the menu.

What you'll see

At the top, a status bar shows:

- **Auto-Provisioning** - whether new employees automatically get a Microsoft 365 account (Enabled or Disabled).
- **Email Domain** - the domain new mailboxes are created under (for example, @yourcompany.com), when configured.

Below that, a row of counts:

- **Total Active** - active employees in the workspace.
- **M365 Linked** - employees with a Microsoft 365 account, plus the percentage of active employees that covers.
- **Unlinked** - active employees without a Microsoft 365 account yet.
- **Disabled** - Microsoft 365 accounts that have been disabled.

Then three tabs:

- **Unlinked** - active employees who don't have a Microsoft 365 account, with their email, department, and designation. If everyone is linked, it says so.
- **Recently Synced** - employees provisioned to Microsoft 365 in the last 7 days, with their Microsoft 365 sign-in name and the time they were synced.
- **Disabled** - Microsoft 365 accounts that have been disabled, with the sign-in name, status, and the time they were disabled.

Notes

- This is an overview screen. The day-to-day provisioning and account tasks (creating accounts, resetting passwords, viewing credentials, disabling and re-enabling accounts) are covered under the Microsoft 365 - provisioning and Microsoft 365 - account management sections of this guide.
- The Auto-Provisioning and Email Domain settings shown here are managed by your administrators; they aren't changed from this screen.

Requires Microsoft365 module

▼ Roles & permissions

super admin. Availability depends on your company's configuration.

Automatic Microsoft 365 accounts

When your company has Microsoft 365 auto-provisioning turned on, adding a new employee in Open Core HR also creates their Microsoft 365 work account automatically - there's nothing extra to click on the new joiner's form.

1. **Microsoft 365** - Open **Microsoft 365** from the menu.

Your account needs administrator access to add employees and see Microsoft 365 details.

What happens when you add an employee

1. On the **Add Employee** form, fill in the employee's details as usual, including first and last name.
2. As you type the name, a **Microsoft 365 Account** box appears showing the work email address that will be created (and whether it's available). A note says a Microsoft 365 account will be created with an Office 365 licence when the employee is saved.
3. Save the employee. In the background, Open Core HR creates the Microsoft 365 account: a sign-in (mailbox) and an assigned licence.

The work email address is built from the employee's name using your company's chosen pattern and email domain - for example `first.last@yourcompany.com`. The exact pattern and domain are set in your company's Microsoft 365 configuration.

Where to find the new joiner's first login details

Once the account is created, open the employee's profile and go to the **Microsoft 365** tab. There you'll see the **Sign-in Email (UPN)** and can reveal the **initial password** to share with the new joiner. See [Looking up an employee's work-account details](#). The employee is required to change this password the first time they sign in to Microsoft 365.

What you'll see

You can review the overall state of Microsoft 365 accounts on the **Microsoft 365** screen in the menu - see [The provisioning overview](#).

Requires Microsoft365 module

▼ Roles & permissions

super admin. Availability depends on your company's configuration.

The provisioning overview

The **Microsoft 365** screen is the dashboard for Microsoft 365 user provisioning and account management. Open it from **Microsoft 365** in the menu.

1. **Microsoft 365** - Open **Microsoft 365** from the menu.

Your account needs administrator access to open this screen.

What you'll see

- **Configuration bar** - shows whether **Auto-Provisioning** is **Enabled** or **Disabled**, and the **Email Domain** new work accounts use.
- **Stats row** - at-a-glance counts: **Total Active** employees, **M365 Linked** (with the percentage of active employees that have a linked account), **Unlinked**, and **Disabled**.
- **Tabs** below the stats:
 - **Unlinked** - active employees who don't have a Microsoft 365 account linked. See [Employees without a linked account](#).
 - **Recently Synced** - employees whose Microsoft 365 account was created in the last 7 days. See [Recently synced accounts](#).
 - **Disabled** - Microsoft 365 accounts that have been disabled. See [Disabled accounts](#).

Each tab heading shows a count in brackets, and each tab opens a table of the matching employees.

Note

This screen is a read-only overview - you don't create, link, or disable accounts from here. Those actions happen automatically (when you add or change an employee) or from the individual employee's profile. See the [Microsoft 365 account management](#) pages.

Requires Microsoft365 module

▼ Roles & permissions

super admin. Availability depends on your company's configuration.

Employees without a linked account

The **Unlinked** tab on the **Microsoft 365** screen lists active employees who don't have a Microsoft 365 account linked yet.

1. **Microsoft 365** - Open **Microsoft 365** from the menu.

Your account needs administrator access to open this screen.

Steps

1. Open **Microsoft 365** from the menu.
2. Select the **Unlinked** tab. The heading shows how many unlinked employees there are.
3. The table - **Unlinked Employees**, "Active employees without a linked Microsoft 365 account" - lists each one with their **Employee**, **Email**, **Department**, and **Designation**. If everyone is linked, you'll see "All employees are linked" instead.

How an account gets linked

This screen shows the list only - it doesn't have a button to link or create an account. A Microsoft 365 account is created automatically when:

- you add the employee while company-wide auto-provisioning is turned on, or
- the employee is moved back to **Active** (or **Onboarding**) and auto-provisioning is on.

So if an employee appears here unexpectedly, check that auto-provisioning is enabled (shown on the configuration bar at the top of the Microsoft 365 screen) and that the employee has an email address.

Requires Microsoft365 module

▼ Roles & permissions

super admin. Availability depends on your company's configuration.

Recently synced accounts

The **Recently Synced** tab on the **Microsoft 365** screen shows employees whose Microsoft 365 account was created in the last 7 days. It's a quick way to confirm new joiners' accounts went through.

1. **Microsoft 365** - Open **Microsoft 365** from the menu.

Your account needs administrator access to open this screen.

Steps

1. Open **Microsoft 365** from the menu.
2. Select the **Recently Synced** tab. The heading shows how many appear.
3. The table - **Recently Synced**, "Employees provisioned to Microsoft 365 in the last 7 days" - lists each one with their **Employee**, **M365 UPN** (their work sign-in email), **Department**, and **Synced At** (when the account was created). If there are none, you'll see "No recent syncs".

Tips

- To share an employee's first login details, open their profile and go to the **Microsoft 365** tab - see [Looking up an employee's work-account details](#).

Requires Microsoft365 module

▼ Roles & permissions

super admin. Availability depends on your company's configuration.

Disabled accounts

The **Disabled** tab on the **Microsoft 365** screen lists Microsoft 365 accounts that have been disabled - usually because the employee is suspended, has left, or has been deactivated.

1. **Microsoft 365** - Open **Microsoft 365** from the menu.

Your account needs administrator access to open this screen.

Steps

1. Open **Microsoft 365** from the menu.
2. Select the **Disabled** tab. The heading shows how many appear.
3. The table - **Disabled Accounts**, "Microsoft 365 accounts that have been disabled" - lists each one with their **Employee**, **M365 UPN**, **Status** (the employee's current status), and **Disabled At** (when the account was disabled). If there are none, you'll see "No disabled accounts".

Re-enabling an account

This screen shows the list only - there's no button here to re-enable an account. A disabled Microsoft 365 account is switched back on automatically when you move the employee back to **Active** (or **Onboarding**) on their profile. See [Pausing and restoring an employee's access](#).

Note that an account left disabled past the grace period is permanently deleted - see [When an employee leaves](#).

Requires Microsoft365 module

▼ Roles & permissions

super admin · edit employees. Availability depends on your company's configuration.

Resetting an employee's Microsoft 365 password

If an employee is locked out of their work account, you can reset their Microsoft 365 password from their profile. Open Core HR generates a new temporary password for you to give them.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Your account needs administrator access (the permission to edit employees) to do this.

Steps

1. Open the employee's profile.
2. Select the **Microsoft 365** tab. (This tab only appears for employees who have a Microsoft 365 account.)
3. Under **Password Management**, select **Reset Password**.
4. The new password is shown on screen. Use **Show / Hide** to reveal it, and **Copy** to copy it.
5. Share the new password with the employee securely. They must change it the next time they sign in.

What you'll see

The new password is generated for both Open Core HR and Microsoft 365 - the employee uses the same password for both. A confirmation message appears once the reset is done.

Looking up the existing password instead

If you just need to read the employee's current initial password (not generate a new one), use **View Initial Password** on the same tab - see [Looking up an employee's work-account details](#).

Requires Microsoft365 module

▼ Roles & permissions

super admin · view employee details. Availability depends on your company's configuration.

Looking up an employee's work-account details

You can see an employee's Microsoft 365 sign-in email and their initial password on their profile - useful when you need to pass first-login details to a new joiner.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Your account needs administrator access (the permission to edit employees) to view the password.

Steps

1. Open the employee's profile.
2. Select the **Microsoft 365** tab. (This tab only appears for employees who have a Microsoft 365 account.)
3. The top of the tab shows:
 - **Sign-in Email (UPN)** - the work email address the employee uses to sign in.
 - **Provisioned On** - when their Microsoft 365 account was created.
4. Under **Password Management**, select **View Initial Password** to reveal the stored initial password. Use **Show / Hide** to reveal it and **Copy** to copy it.

What you'll see

- The employee's UPN also appears as an **M365** badge near their name at the top of the profile.
- If no initial password is stored (for example it was never recorded), use **Reset Password** to generate a new one to share - see [Resetting an employee's Microsoft 365 password](#).

Requires Microsoft365 module

▼ Roles & permissions

super admin · edit employees. Availability depends on your company's configuration.

Pausing and restoring an employee's access

When you change an employee's status, Open Core HR keeps their Microsoft 365 work account in step. Suspending or deactivating an employee disables their work account; moving them back to active switches it on again.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Your account needs administrator access (the permission to edit employees) to change an employee's status.

Suspending an employee (temporary)

1. Open the employee's profile.
2. Select **Actions**, then **Suspend** ("Disable access temporarily. M365 account disabled, license retained.").
3. Confirm. Their Microsoft 365 account is disabled, but the licence is kept so it can be switched back on quickly.

The employee then shows on the **Disabled** tab of the **Microsoft 365** screen.

Restoring an employee

1. Open the employee's profile.
2. Select **Actions**, then **Reactivate** ("Restore full access to all platforms").
3. Confirm. Their disabled Microsoft 365 account is re-enabled.

If the employee's Microsoft 365 account was already deleted (for example after the grace period for a leaver), reactivating them creates a fresh account instead, as long as company-wide auto-provisioning is on.

Notes

- **Terminate** and **Relieve** also disable the Microsoft 365 account, but those are permanent - the account is deleted after the grace period. See [When an employee leaves](#).
- If the employee manages other people, you'll be asked to acknowledge that their direct reports will be left without a manager before the status change goes through.
- You can't change your own status.

Requires Microsoft365 module

▼ Roles & permissions

super admin · edit employees. Availability depends on your company's configuration.

When an employee leaves

When you relieve or terminate an employee, Open Core HR disables their Microsoft 365 work account straight away, then permanently deletes it - and reclaims the licence - after a grace period.

1. **Employees** - Open the **Employees** group in the menu.
2. **Active** - Then choose **Active**.

Your account needs administrator access (the permission to edit employees) to do this.

Steps

1. Open the employee's profile.
2. Select **Actions**, then:
 - **Relieve** - for a resignation or end of contract ("M365 account will be deleted after grace period").
 - **Terminate** - for a permanent deactivation ("M365 account will be deleted after grace period").
3. Confirm. The Microsoft 365 account is disabled immediately. The employee then appears on the **Disabled** tab of the **Microsoft 365** screen.

If you instead delete the employee record entirely (from the **Actions** menu), their Microsoft 365 account is also disabled immediately and deleted after the grace period.

The grace period

A disabled work account is kept for a grace period so it can still be restored if the person comes back, and so any handover can happen. After the grace period passes, Open Core HR permanently deletes the Microsoft 365 account and frees up the licence - this cleanup runs automatically on a daily schedule.

The exact length of the grace period is part of your company's Microsoft 365 configuration.

Bringing someone back during the grace period

If the employee returns before their account is deleted, reactivating them on their profile switches the same account back on. If the account has already been deleted, reactivating them creates a fresh account (when company-wide auto-provisioning is on). See [Pausing and restoring an employee's access](#).

Requires Microsoft365Mailbox module

Email & Calendar

Open Core HR can show your Microsoft 365 mailbox and calendar right inside the app, so you can read and send mail and manage events without leaving Open Core HR.

Availability

Email and Calendar work only if your company uses Microsoft 365 and your account is connected to it. If you don't see **Email** in your menu, it isn't enabled for you - check with your HR or IT team.

Opening Email

Click **Email** in your menu (it shows an **Inbox** link and a **Calendar** link). This opens your mailbox with the inbox selected.

How the screen is laid out

- **Folder list (left side):** Your mail folders, with **Inbox** at the top, followed by **Drafts**, **Sent Items**, **Deleted Items**, and any other folders such as **Junk Email** or **Archive**. A folder with unread mail shows a small count badge. You can collapse the folder list to icons only with the arrow button at the bottom.
- **Compose button:** At the top of the folder list, a button with a + icon labelled **Compose** starts a new message.
- **Message list (middle):** The messages in the folder you're viewing - sender, subject and a short preview. Unread messages are shown in bold with a green dot. A paperclip means the message has attachments; an orange flag means it's flagged.
- **Reading pane (right side):** When you click a message, it opens here so you can read it and reply, forward, flag or delete it.
- **Calendar:** Below the folder list, a **Calendar** link opens your calendar in a month view.

At the top of the page there's a search box and, on the right, a theme switch and your account menu.

Related pages

- [Reading your mail](#)
- [Sending a new message](#)
- [Viewing your calendar](#)

Requires Microsoft365Mailbox module

Reading your mail

Open your mailbox to read incoming messages, switch between folders, and mark mail as read or unread.

Availability

Email and Calendar work only if your company uses Microsoft 365 and your account is connected to it. If you don't see **Email** in your menu, it isn't enabled for you - check with your HR or IT team.

Steps

1. Click **Email** in your menu. Your **Inbox** opens with the message list shown.
2. To switch folders, click a folder name in the list on the left - for example **Sent Items**, **Drafts** or **Deleted Items**. The message list updates to show that folder.
3. Click a message in the list to open it in the reading pane on the right.
4. Read the message. You'll see the subject, who it's **From**, who it's **To**, any **CC** recipients, and the **Date**. If the message has attachments, they appear as chips above the message body.
5. If the conversation has earlier messages, a line such as "2 earlier messages in this conversation" appears - click any entry to expand and read it.

Marking read and unread

- Opening an unread message marks it as read automatically.
- To change it yourself, use the mail icon in the action bar at the top of the reading pane. The tooltip says **Mark as unread** or **Mark as read** depending on the current state.

Refreshing

The folder list refreshes on its own every minute, so unread counts stay up to date. Switching folders or reopening a message also reloads the latest mail.

Tips

- On a small screen the reading pane replaces the message list. Use **Back to messages** at the top left to return to the list.
- If a folder is empty you'll see "No messages found".
- Use **Load more** at the bottom of the list to fetch older messages.

Related pages

- [Searching your mail](#)
- [Replying and forwarding](#)
- [Organizing your mail](#)

Requires Microsoft365Mailbox module

Searching your mail

There's a search box at the top of the mailbox for finding messages.

Availability

Email and Calendar work only if your company uses Microsoft 365 and your account is connected to it. If you don't see **Email** in your menu, it isn't enabled for you - check with your HR or IT team.

Steps

1. Click **Email** in your menu to open your mailbox.
2. At the top of the page, click the box labelled **Search emails...** (it has a magnifying-glass icon).
3. Type what you're looking for, such as a sender, subject word or phrase. After a short pause, the message list displays matching results from your mailbox.
4. Select a result to read it. If there are 1,000 matches, refine the query to find a more specific result.

Tips

- Clear the box to go back to the normal folder view.
- Search results use the mailbox search service. Clear the query to browse a particular folder instead.

Related pages

- [Reading your mail](#)

Requires Microsoft365Mailbox module

Sending a new message

Write and send a new email from inside Open Core HR.

Availability

Email and Calendar work only if your company uses Microsoft 365 and your account is connected to it. If you don't see **Email** in your menu, it isn't enabled for you - check with your HR or IT team.

Steps

1. Click **Email** in your menu.
2. Click the **Compose** button (the + button at the top of the folder list). The **New Message** screen opens.
3. In the **To** field, start typing a name or email address and pick a colleague from the list, or type a full email address. Add as many recipients as you need.
4. To copy other people, click **CC** or **BCC** next to the **To** field and add addresses there.
5. Type a **Subject**.
6. Write your message in the body box. Use the toolbar above it to make text bold, italic, strikethrough, add a bullet list or numbered list, or add a link.
7. To attach files, see [Attachments](#).
8. Click **Send**.

What you'll see

After the message is sent you're taken back to your mailbox and an "Email sent" confirmation appears. If you didn't add any recipient, you'll be asked to add at least one.

Tips

- Click **Save Draft** to keep the message without sending it - see [Drafts](#).
- Click **Cancel** to leave without sending.

Related pages

- [Replying and forwarding](#)
- [Attachments](#)
- [Drafts](#)

Requires Microsoft365Mailbox module

Replying and forwarding

When a message is open in the reading pane, you can reply to the sender, reply to everyone, or forward it on.

Availability

Email and Calendar work only if your company uses Microsoft 365 and your account is connected to it. If you don't see **Email** in your menu, it isn't enabled for you - check with your HR or IT team.

Reply to the sender

1. Open the message.
2. In the action bar at the top of the reading pane, click **Reply**. A reply box opens below the message, addressed to the sender.
3. Type your reply in the editor.
4. Click **Send**.

You can also click the **Click here to reply...** prompt at the bottom of an open message to start a reply the same way.

Reply to everyone

1. Open the message.
2. Click **Reply All** in the action bar. The reply box opens addressed to the sender and all other recipients.
3. Type your reply and click **Send**.

Forward a message

1. Open the message.
2. Click **Forward** in the action bar. The **Forward** screen opens with the original subject (prefixed with "Fwd:") and the original message quoted in the body.
3. Add one or more recipients in the **To** field.
4. Add any note above the quoted message.
5. Click **Forward**.

Tips

- If you start a reply and then click the close (X) button or **Discard**, you'll be asked to confirm before any text you typed is thrown away.
- Switching to a different message closes an open reply box.

Related pages

- [Reading your mail](#)
- [Sending a new message](#)

Requires Microsoft365Mailbox module

Drafts

A draft is a message you've started but haven't sent yet. Drafts are kept in the **Drafts** folder.

Availability

Email and Calendar work only if your company uses Microsoft 365 and your account is connected to it. If you don't see **Email** in your menu, it isn't enabled for you - check with your HR or IT team.

Saving a draft

1. Click **Compose** to start a new message and fill in whatever you have so far - recipients, subject, body.
2. Click **Save Draft**. A "Draft saved" confirmation appears. The message is stored in your **Drafts** folder.

Opening a draft

1. Click **Email** in your menu.
2. In the folder list on the left, click **Drafts**.
3. Click the draft to view it in the reading pane. To continue editing and send a saved draft, use Outlook; this web compose screen currently creates new messages and does not reopen an existing draft for editing.

Discarding a draft

To remove a draft you no longer want, open it from the **Drafts** folder and use the delete (trash) button in the action bar. It moves to **Deleted Items**, where you can still recover it if needed.

Related pages

- [Sending a new message](#)
- [Organizing your mail](#)

Requires Microsoft365Mailbox module

Organizing your mail

You can flag messages that need attention and delete messages you no longer want.

Availability

Email and Calendar work only if your company uses Microsoft 365 and your account is connected to it. If you don't see **Email** in your menu, it isn't enabled for you - check with your HR or IT team.

Flagging a message

1. Open the message in the reading pane.
2. In the action bar, click the flag icon. The flag turns orange to show the message is flagged, and a flag icon appears next to it in the message list.
3. To remove it, click the flag icon again.

Marking read or unread

In the action bar, click the mail icon to switch a message between read and unread. The tooltip shows **Mark as unread** or **Mark as read**.

Deleting a message

1. Open the message in the reading pane.
2. Click the trash icon in the action bar.
3. Confirm by clicking **Delete**. The message moves to **Deleted Items**, where you can recover it if needed. A "Message deleted" confirmation appears.

Archiving and returning to Inbox

Open a message and click the archive icon in the action bar (**Archive this message**). In the Archive folder, the same control becomes **Move to Inbox**. For other folder moves, use Outlook.

Related pages

- [Reading your mail](#)
- [Drafts](#)

Requires Microsoft365Mailbox module

Attachments

You can attach files to a new message and download files that arrive on messages you receive.

Availability

Email and Calendar work only if your company uses Microsoft 365 and your account is connected to it. If you don't see **Email** in your menu, it isn't enabled for you - check with your HR or IT team.

Attaching a file when composing

1. Click **Compose** to start a new message.
2. Below the message body, click **Attach Files** (the button with a paperclip icon).
3. Choose one or more files from your device. Each file appears as a chip showing its name.
4. To remove a file you added, click the X on its chip.
5. Finish your message and click **Send**.

Attaching files is available on new messages. (Reply and forward don't have an attach-files button.)

Downloading an attachment you received

1. Open the message in the reading pane.
2. Attachments appear as chips above the message body, each showing the file name and size with a paperclip and a download icon.
3. Click the attachment chip to download the file.

Tips

- A message with attachments shows a paperclip icon next to it in the message list.

Related pages

- [Sending a new message](#)
- [Reading your mail](#)

Requires Microsoft365Mailbox module

Viewing your calendar

Your Microsoft 365 calendar appears inside Open Core HR as a month grid, with a panel showing the events on the day you've selected.

Availability

Email and Calendar work only if your company uses Microsoft 365 and your account is connected to it. If you don't see **Email** in your menu, it isn't enabled for you - check with your HR or IT team.

Steps

1. Click **Email** in your menu, then click **Calendar** in the list on the left. The page title is **Calendar**.
2. The calendar shows the current month, with weekdays running Monday to Sunday. Today's date is marked. Days with events show small green dots (and a "+" count if there are more than three).
3. To move between months, use the left and right arrow buttons above the grid. The month and year are shown between them.
4. Click any day to select it. The panel on the right lists that day's events, each showing the title, the time (or "All day"), the location if there is one, and the organizer.
5. If a day has no events, the panel shows "No events for this day".

What you'll see

The calendar shows a month view only. There isn't a separate day or week view in the web calendar.

Related pages

- [Creating an event](#)
- [Editing and deleting events](#)

Requires Microsoft365Mailbox module

Creating an event

Add a meeting or event to your Microsoft 365 calendar from inside Open Core HR.

Availability

Email and Calendar work only if your company uses Microsoft 365 and your account is connected to it. If you don't see **Email** in your menu, it isn't enabled for you - check with your HR or IT team.

Steps

1. Click **Email** in your menu, then click **Calendar**.
2. Click **New Event** (the button with a + icon at the top right). The **New Event** form slides in from the right.
3. Fill in the details:
 - o **Subject** - a title for the event (required).
 - o **All day** - turn this on for an all-day event. When it's on, the time fields are hidden.
 - o **Start date** and **Start time** - when the event begins.
 - o **End date** and **End time** - when it ends.
 - o **Location** - where it takes place (optional).
 - o **Attendees** - start typing a name or email and pick a colleague, or type a full address; add as many as you need (optional).
 - o **Recurrence** - leave as **None**, or choose **Daily**, **Weekly** or **Monthly** to repeat the event.
 - o **Description** - any extra notes (optional).
4. Click **Create Event**. An "Event created" confirmation appears and the event shows on the calendar.

Tips

- Click **Cancel** to close the form without creating anything.
- After it's created, click the event in the day panel to make changes - see [Editing and deleting events](#).

Related pages

- [Viewing your calendar](#)
- [Editing and deleting events](#)

Requires Microsoft365Mailbox module

Editing and deleting events

You can open an event from your calendar to change its details. Use Outlook to delete an event when a delete control is unavailable in the web calendar.

Availability

Email and Calendar work only if your company uses Microsoft 365 and your account is connected to it. If you don't see **Email** in your menu, it isn't enabled for you - check with your HR or IT team.

Editing an event

1. Click **Email** in your menu, then click **Calendar**.
2. Click the day the event is on. Its events appear in the panel on the right.
3. Click the event. The **Edit Event** form slides in from the right with the event's details filled in.
4. Change whatever you need - **Subject**, **All day**, the start and end **date** and **time**, **Location**, **Attendees**, **Recurrence** or **Description**.
5. Click **Update Event**. An "Event updated" confirmation appears.

Deleting an event

The current web calendar does not expose an event delete button. Delete the event from Outlook or the Outlook mobile app, then refresh your calendar here.

Tips

- Click **Cancel** to close the form without saving changes.

Related pages

- [Viewing your calendar](#)
- [Creating an event](#)

Requires Microsoft365Mailbox module

Responding to meeting invitations

This page covers accepting, declining, or marking yourself tentative on a meeting someone has invited you to.

Availability

Email and Calendar work only if your company uses Microsoft 365 and your account is connected to it. If you don't see **Email** in your menu, it isn't enabled for you - check with your HR or IT team.

What you can do today

In the web calendar, opening an event shows its details (subject, time, location, organizer) and lets you edit it - there are no **Accept**, **Tentative** or **Decline** buttons on the event.

In the meantime, you can respond to meeting invitations in Outlook or the Outlook mobile app.

Related pages

- [Viewing your calendar](#)
- [Editing and deleting events](#)

Requires Microsoft365Mailbox module

Checking when people are free

This page covers seeing whether the people you're inviting are free or busy before you pick a meeting time.

Availability

Email and Calendar work only if your company uses Microsoft 365 and your account is connected to it. If you don't see **Email** in your menu, it isn't enabled for you - check with your HR or IT team.

What you can do today

When you add attendees to an event, the **New Event** / **Edit Event** form lets you type names or email addresses and pick colleagues - but it does not show their free/busy times or a scheduling assistant.

In the meantime, check people's availability in Outlook or the Outlook mobile app when planning a meeting time.

Related pages

- [Creating an event](#)
- [Viewing your calendar](#)