Nexura HRMS
User Guide

Step-by-step help for every module, page and tab — from sign-up to payroll, compliance and administration.

Nexura Global Talent · hrms.nexuragt.com · Version: November 2026

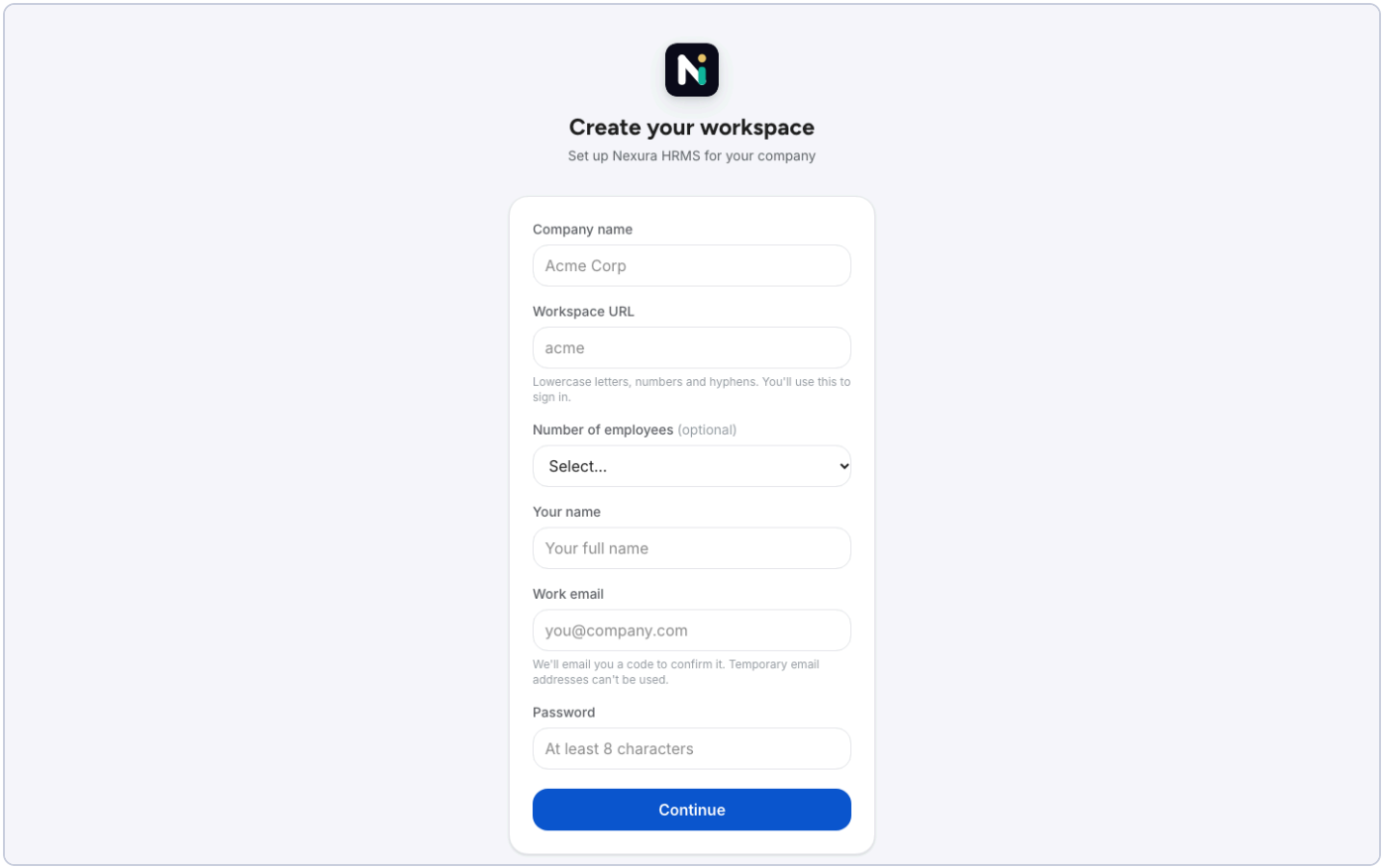
This guide describes Nexura HRMS as it works today, including its limits. Statutory and tax figures produced by the software should be reviewed by your accountant before you pay or file.

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1. Getting started

1. Creating your company workspace (sign-up)



Creating a workspace

Where: the sign-up page on the main Nexura address, hrms.nexuragt.com/signup. You can also click **Create a workspace** under the sign-in box.

Fields on the "Create your workspace" form:

Field	Required?	Good to know
Company name	Yes	For example "Acme Corp". This name appears in the sidebar and on your sign-in page.
Workspace URL	No (filled in for you if left blank)	Use lowercase letters, numbers and hyphens, 3–30 characters. It can't start or end with a hyphen. If you leave it blank, it's built from your company name. It becomes your company's address, for example `acme` gives acme.hrms.nexuragt.com. Some words are reserved (such as *admin*, *login*, *demo*, *support*, *billing* and *hrms*), and every address must be unique. **You can't change it later.** Company Settings shows it greyed out as **Login Slug**.
Number of employees	No	Choose 1-10, 11-25, 26-50, 51-100, 101-250 or 250+. It's for information only and is never used for billing.

Field	Required?	Good to know
Your name	Yes	You become the workspace's first **Admin**.
Work email	Yes	Use a valid work address. Temporary or disposable addresses are refused. You'll sign in with this email.
Password	Yes	At least 8 characters.

How to create your workspace:

1. Fill in the form and click **Continue**.
2. We email a 6-digit code to your work email. Check your spam folder if it hasn't arrived.
3. Type the code and click **Verify and create workspace**.

Nothing is created until you enter the code. For more on the code step (new codes, time limits and changing your email), see the chapter *Sign-in options, privacy and approvals*.

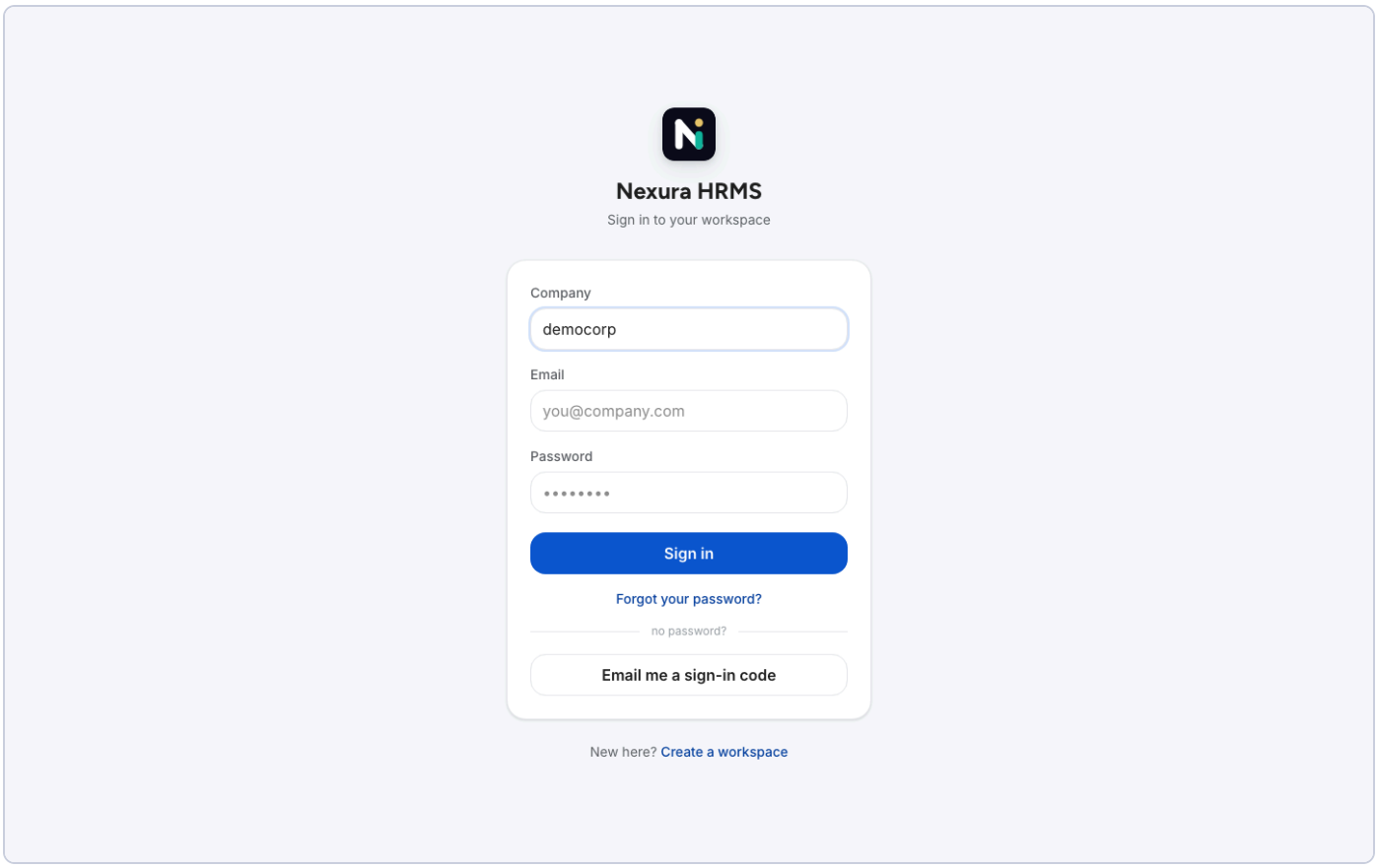
What happens next:

1. Nexura creates your workspace and an Admin login for you. It also adds four starter leave types, which you can change later: Earned Leave (EL, 18 days a year, paid), Casual Leave (CL, 8, paid), Sick Leave (SL, 12, paid) and Loss of Pay (LOP, 0, unpaid).
2. **Free trial**
    - **When Nexura manages your billing** (the usual set-up): each company gets one free trial. As an Admin you'll see a banner such as "Free trial: 12 days left." with a **Choose a plan** link.
        - If your sign-up looks like a repeat trial, the workspace is still created, but without a trial. You go to **Billing & plan** to choose a plan.
        - If the trial can't be confirmed straight away, you'll see "We're confirming your free trial". This usually takes less than a day, and you get an email when your trial starts.
    - **When your workspace runs its own billing**, a 14-day free trial starts straight away.
3. A welcome email with your sign-in link goes to your address, if email sending is set up.
4. **You're signed in automatically.**
    - **When company addresses are on**, you're moved to your company's own address (for example acme.hrms.nexuragt.com), already signed in, and the Dashboard opens.
    - **Otherwise**, the Dashboard opens at the same address.
    - If your workspace starts without a free trial, **Billing & plan** opens instead of the Dashboard.

Good to know:

- One network can create at most 5 workspaces an hour. After that you'll see "Too many sign-ups from your network…".
- If the address is taken, you'll see "The workspace URL "…" is already taken." Choose another one.

2. Signing in



The sign-in page

2.1 Your company's sign-in address

- **When company addresses are on** (the live service), every company has its own address: **yourcompany.hrms.nexuragt.com**. Go there and the sign-in box shows your company name. Enter your **Email** and **Password**, then click **Sign in**. Employees and Managers can skip the password: click **Email me a sign-in code** instead (see section 2.7).
- **On the main address (hrms.nexuragt.com)** you'll see "Find your workspace". Type your workspace name in **Your workspace** (the box already ends in `.hrms.nexuragt.com`) and click **Continue**. You're taken to your company's sign-in page. If the name is wrong, you'll see "We couldn't find that workspace. Check the name, or ask your HR team for your sign-in address."
- **A wrong or inactive company address** shows "Workspace not found", with a link to find your workspace.
- **Wrong company?** Your company's sign-in page has a "Not your company? Find your workspace" link.
- **When company addresses are off** (for example on a test set-up), the sign-in form has an extra **Company** box. Type your workspace name there.

After you sign in, everyone lands on the **Dashboard**.

2.2 Sign-in protections

- **Wrong password:** you'll see "Invalid email or password."
- **Too many attempts from one place:** after 5 tries in 15 minutes for the same account from the same network, you'll see "Too many sign-in attempts. Please wait a few minutes and try again."

- **Account lock:** 10 failed attempts in a row lock the account for 15 minutes ("Too many failed attempts. Please try again later."). Wrong two-step codes count towards this too.
- **How long you stay signed in:** a session lasts 8 hours. After that, you sign in again.
- **Disabled or suspended accounts:** a disabled user, or a workspace Nexura has switched off, can't sign in.
- **Former employees:** once an employee's status is **Resigned** or **Terminated**, their Employee or Manager login stops working: password and emailed code alike. They're also signed out on every device. They see "Your access ended when you left the company. Please contact HR if you need your documents." HR and Admin logins aren't affected.

2.3 Forgot or reset your password

1. On the sign-in page, click **Forgot your password?**
2. Enter your **Email**. If your sign-in page has a **Company** box, enter your company too. Click **Send reset link**.
3. You'll always see "If an account matches those details, we've sent a password reset link…", even if no account matches. This protects your colleagues' privacy.
4. Open the email and follow the link. It works once and lasts 60 minutes.
5. On "Choose a new password", fill in **New password** (at least 8 characters) and **Confirm new password**, then click **Update password**.
6. You'll see "Your password has been updated…". Click **Go to sign in**.

Good to know:

- Resetting your password signs you out on every device.
- If the link has expired or been used, you'll see "This reset link is invalid or has expired…". Request a new one.
- You can ask for about 3 reset links an hour for the same account from one network.
- Reset emails arrive only if email sending is set up. An Admin can check this under **Settings** › **Email delivery**.
- There's no "change password" page for your own account. Use **Forgot your password?**, or ask an Admin to set a new one on the **Users & access** page.

2.4 Two-step sign-in (2FA / MFA)

Two-step sign-in adds a 6-digit code from an authenticator app, such as Google Authenticator, Authy or 1Password, on top of your password.

Turning it on yourself (My Portal (ESS) → **My Profile**, "Two-factor authentication" card):

1. Click **Set up two-factor**.
2. Under "1. Add this key to your app", type the key shown, or the setup address, into your authenticator app.
3. Under "2. Enter the 6-digit code", type the current code and click **Verify & enable**.
4. You'll get **10 recovery codes**. They're shown only once, so use **Copy** or **Download .txt** to keep them safe, then click **I've saved them**.

Other buttons on the same card:

- **Regenerate recovery codes:** enter a current code, then click **Generate new codes**. Your old codes stop working. The card warns you when 3 or fewer codes are left.
- **Disable two-factor:** enter a current code, then click **Disable**. You can't turn it off while your company requires 2FA.

> **Good to know:** the two-factor card on My Profile appears only when your login is linked to your employee record (see section 3.2). If your login isn't linked, including the Admin who created the workspace, you set up two-step sign-in when your company requires it (see section 2.5).

Signing in with two-step on:

1. Enter your email and password and click **Sign in**.
2. The form changes to "Authentication code". Enter the 6-digit code from your app, **or** one of your recovery codes, then click **Verify**.

Good to know:

- Each recovery code works once. Using one is recorded in the audit trail.
- You have 5 minutes to enter the code. After that, start again ("Your login attempt expired. Please sign in again.").
- If the code is wrong, you'll see "Invalid authentication or recovery code."

2.5 Requiring 2FA for the whole company (Admin)

Go to System Administration → **Settings**, "Security policy" card:

- Click **Require 2FA for everyone** to turn it on. The badge changes to "2FA required".
- Click **Make 2FA optional** to turn it off again.

What happens when it's on: anyone without two-step sign-in, including you, sees "Set up two-factor authentication — Your company requires 2FA before you can continue" the next time they open Nexura.

1. They click **Set up two-factor**.
2. They enter the code and click **Verify & enable**.
3. They save their recovery codes and click **I've saved them — continue**.

They can't use Nexura until they finish, but they can **Sign out** from that screen. Turning the policy on or off is recorded in the audit trail.

2.6 Signing out, and "sign out everywhere"

- **Sign out (this device):** click your name or initials at the top right, then **Sign out**.
- **Sign out everywhere (yourself):** My Profile → "Signed-in devices" card. It shows how many devices you're signed in on. Click **Sign out everywhere** to end every session, including the one you're using. You'll go back to the sign-in page. This card appears only when your login is linked to your employee record.
- **An Admin signing other people out:** System Administration → **Sessions & MFA**.
    - **Revoke** ends one session (one browser). It isn't offered for the session you're using.
    - **All devices** signs that user out everywhere. If you use it on yourself, you stay signed in on the current device.

- **These also sign a user out everywhere:** an Admin setting a new password for them, an Admin disabling their account, or the user resetting their own password.

2.7 Signing in with an emailed code (no password)

Employees and Managers don't need a password. They sign in with their work email and a 6-digit code.

1. Open your company's sign-in address and click **Email me a sign-in code**.
2. Type your **work email**, the one HR has on your employee record, and click **Email me a code**.
3. Check your inbox for an email titled "123456 is your <company> sign-in code". Type the code and click **Sign in**.

Your first sign-in creates your login. If HR has added you as an employee with that email, but you've never signed in, Nexura creates your login the first time you use a code. It links the login to your employee record, so leave, payslips and attendance work straight away. You get the **Manager** role if anyone reports to you, otherwise **Employee**. HR and Admins get a "New login created" notification.

Good to know:

- You always see "If … can sign in here, a 6-digit code is on its way", whether or not the email is known. This protects your colleagues' privacy.
- A code lasts **10 minutes** and works **once**. Only the newest code works. Click **Didn't get it? Send a new code** for another one (at most one a minute).
- After 5 wrong tries, request a new code. Wrong codes also count towards the account lock in section 2.2.
- **HR and Admin logins can't use codes.** They sign in with their password (and two-step code, if set up).
- If you've turned on two-step sign-in, you're still asked for your authenticator code after the emailed code.
- No code arrives? Check your spam folder, and check with HR that your employee record has the right email. An employee with no email, or two employees sharing one email, can't use codes.
- Want a password as well? Use **Forgot your password?** (section 2.3) to set one.

3. Roles and logins

3.1 What each role can do

Every login has **one** of these built-in roles. The role decides what the person sees and can do, and menus show only the pages they can open. A role change takes effect on the person's next click.

Need something in between, such as an HR person who handles only payroll, or only recruitment? An Admin can give anyone a ready-made role (Payroll HR, Recruiter, Attendance officer and more) or tick exactly the modules they need. See **Users & access** and **Roles** under System Administration (Part B).

Role	In plain words
Admin	Everything, including System Administration: users, roles, sessions, the 2FA policy, company settings, master data, workflow rules, integrations and billing. Only Admins see the PLATFORM group.

Role	In plain words
HR	All HR modules for the whole company: people, attendance, leave, payroll, recruitment, performance and reports. No System Administration menu.
Manager	Their own self-service, plus team tools for their **direct reports**. They approve leave, attendance, regularisation, timesheets and expenses only for their own team. They see Reports & Analytics, but some pages there are for Admin and HR only (see Part B).
Employee	Self-service only: their own profile, attendance, leave, payslips, expenses and requests.
Super Admin (Nexura only)	Not a company role. The Nexura team uses it in a separate control panel ("Product owner · all workspaces") to create workspaces, extend trials, and activate, cancel, expire, suspend or restore a workspace. A Super Admin never sees your company's HR screens.

3.2 How a person gets a login

A login is what someone signs in with. To use self-service (leave, payslips, attendance, My Profile), a login must be **linked** to the person's employee record.

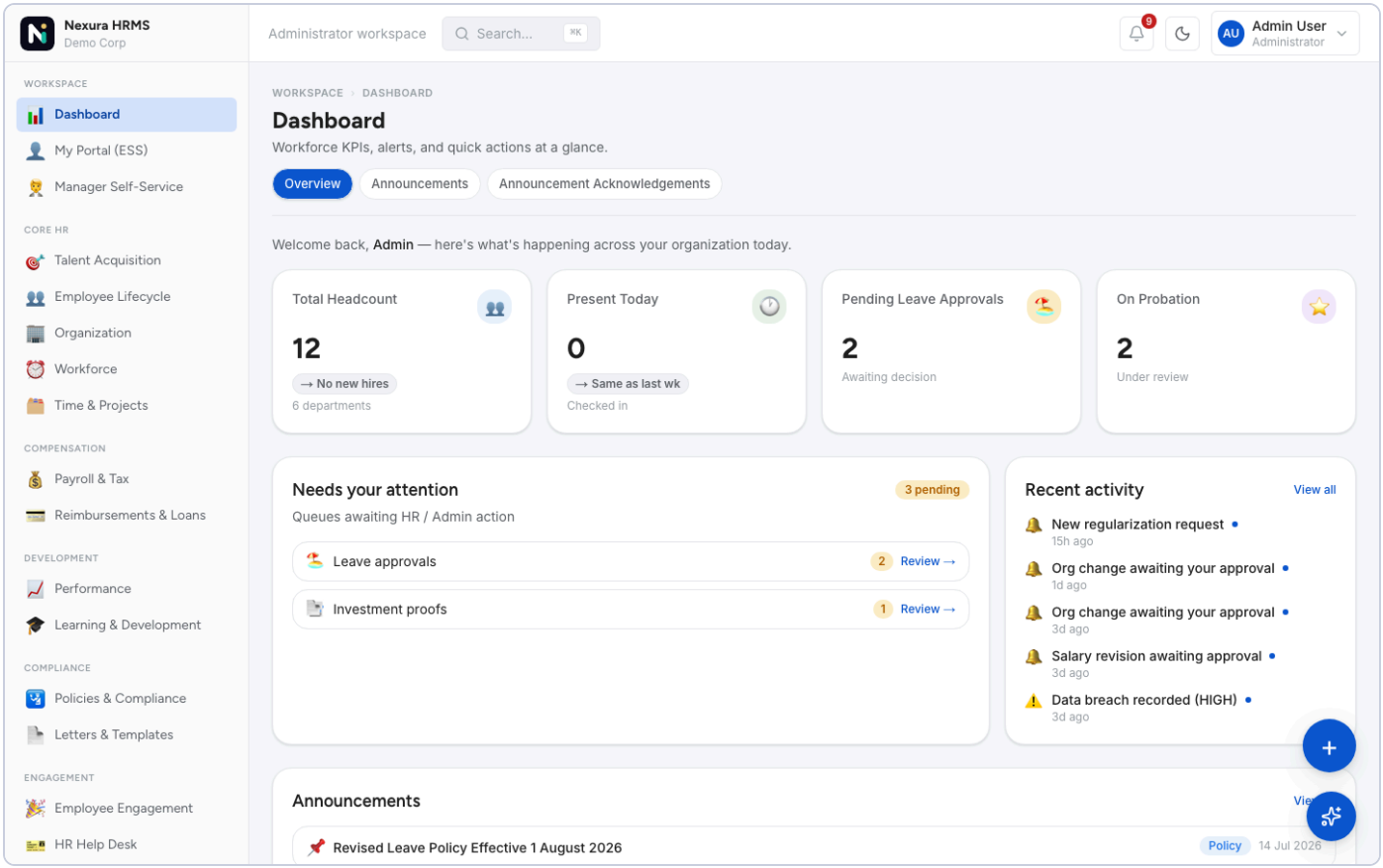
Employees and Managers: nothing to set up. Once HR adds someone in the **Directory** with their work email, they can sign in with an emailed code (section 2.7). Their first sign-in creates the login, links it to their employee record, and gives them the Manager role if anyone reports to them, otherwise Employee. So for most companies, your employee list is your login list.

HR, Admins, and anyone who wants a password: an Admin creates the login.

1. Go to System Administration → **Users & access**.
2. Click **+ New User**.
3. Fill in **Name**, **Email**, **Role** (Admin / HR / Manager / Employee), **Status** and **Password**.
4. Leave **Employee record** on **Find by email automatically**. Nexura links the login to the employee with the same email. Or pick the person from the list.
5. Click **Create User**, and share the sign-in address and password with the person yourself. Nexura doesn't send an invitation email.

Linking an existing login: the **Employee record** column on Users & access shows who each login is linked to. A login that isn't linked shows an amber **Not linked — link** button. Click it, choose the person under **Employee record**, and click **Save Changes**. Someone whose login isn't linked sees "Your login isn't connected to an employee record yet" on their self-service pages.

4. Finding your way around



The Admin dashboard, with the menu on the left

- **Sidebar (left):**
    - It shows your company name and the modules your role can use, grouped under headings such as WORKSPACE, CORE HR, COMPENSATION, INSIGHTS and PLATFORM.
    - Clicking a module opens its first page.
    - On phones the sidebar is tucked behind the ≡ menu button. Tap outside it or press Esc to close it.
- **Module header and tabs:** at the top of each page you'll see the group › module name, a one-line description, and a row of **tabs**, one for each page in the module that your role can open. A tab marked **Soon** is on its way and shows a "coming soon" page.
- **Pages listed under two menus:** a few pages appear in two menus, for example **Pending Approvals** and **Approval Inbox**. The page stays under the menu you opened it from.
- **Pages not in your plan:** this applies only when Nexura manages your plan.
    - Modules your plan doesn't include don't appear in the sidebar or tabs.
    - If you open one by its address, you'll see **"Not in your plan"**. Admins get a **See plans** button that opens Billing. Everyone else is asked to contact their administrator. **Back to dashboard** takes you home.
    - Dashboard, Home, Notifications, My Profile, Billing and Settings are always available.
- **Notifications bell (top right):**
    - A red badge shows how many unread notifications you have (9+ when there are many).
    - Click it to open the Notifications page. There you can **Mark read** or **Mark all read**, open the linked item, and turn on phone alerts if they're available.
- **Search (top bar, or Ctrl+K / ⌘K):**

    - It finds any page you're allowed to open, by page, module or group name. Typing more words narrows the results, for example "team leave".
    - Use ↑ ↓ and Enter to move and open, or Esc to close.
    - It searches page names only, not employee details.
- **Theme toggle:** the moon or sun icon at the top right switches between light and dark mode. Your browser remembers your choice.
- **Your name menu:** shows your name, role and email, plus **Sign out**.
- **Ask Nexura (the ✨ round button, bottom right):**
    - A help assistant that answers "how do I…" questions about Nexura, covering only what your role can access. Suggested questions include "What can I do in this system?" and "How do I view my salary slip?".
    - It **can't see your personal data or make changes**.
    - You can ask about 60 questions an hour.
    - The conversation isn't kept after you reload the page.
    - If Nexura hasn't switched the assistant on for you yet, it tells you so.
- **Phone bottom bar:**
    - On phones, employees (and anyone on a My Portal page) get quick tabs: **Home**, **Punch**, **Leave** and **Payslips**.
    - Managers, and anyone with approvals waiting, also get an **Approvals** tab with a count.

5. First-time setup checklist for a new company Admin

Your **Dashboard** shows a **Get your company ready** card until the basics are done: company details, employees with salaries, who reports to whom, leave types, employees signing in, and your first payroll. Each step ticks itself off, and the card disappears when all are done. The full list below covers everything, in order. Later steps pick from lists you create in earlier ones.

1. **Company settings** (System Administration → **Settings**):
    - **Company Name** (required). Optional: **Legal Name**, **Country**, **Address**, **GSTIN**, **PAN**, **TAN**, **PF Establishment No.** and **ESIC No.**
    - **Probation length (months)**, from 1 to 24 (default 6). It sets the confirmation-due date for new joiners on probation, and HR is notified when that date arrives.
    - **Weekly offs**: tick the days (Sun–Sat). These are used when counting leave days. An employee's shift roster weekly off takes priority. Ticking none means no weekly offs.
    - Click **Save Settings**.
    - Optional: click **Send test email** to check that email works.
    - Optional: decide whether to **Require 2FA for everyone**.
2. **Organisation lists** (System Administration → **Master Data**). Use **+ Add** on each list:
    - **Departments** (name, optional code)
    - **Designations**
    - **Grades** (name and a rank number)
    - **Locations** (name, city, state)
3. **Cost centres** (Organization → **Cost Centres**): click **+ New Cost Centre**.
4. **Leave types and leave policy**

    - Check or adjust the four starter leave types under Master Data → **Leave Types**: code, days per year, paid or unpaid.
    - Then set the rules under Workforce → **Leave Type Configuration**: leave year (calendar or financial), accrual (monthly or up front), carry-forward and maximum accumulation. Click **Save policy**.
5. **Holidays** (Workforce → **Holidays**): click **Add Holiday** for each one.
6. **Shifts** (Workforce → **Shifts & Roster**): click **+ New Shift**. Later, use **+ New Assignment** to roster employees.
7. **Salary components** (Master Data → **Salary Components**, Admin only): add your **Earnings** and **Deductions** with **+ Add**. You need these before you can build salary structures.
8. **Statutory rates** (Payroll & Tax → **Statutory Rates**):
    - Check PF, ESI, Professional Tax slabs and Labour Welfare Fund amounts.
    - Until you save, national defaults and built-in starter slabs are used.
    - Click **Save Rates**.
9. **Employees** (Employee Lifecycle → **Directory**):
    - Use **+ Add Employee** one at a time, or ↑ **Bulk upload** to import many.
    - Click ↓ **Download Excel template**. The columns are: Employee ID, Full Name, Email, Mobile, Gender, Date of Joining, Department, Designation, Location, Grade, Cost Centre, Manager (Employee ID), Status, Annual CTC, and monthly salary columns such as Salary: Basic (monthly) and Salary: HRA (monthly). Add, rename or remove "Salary: …" columns to match your own salary heads.
    - Fill in each person's **Email**. It's how they'll sign in (section 2.7).
    - Either create departments, locations and the other lists first, or tick **Create missing departments, designations, locations, grades, cost centres and salary components** in the upload.
10. **Salary structures** (Payroll & Tax → **Salary Structure**): created for you from the salary columns in the upload. Use **+ Add Structure** for anyone you left without salary.
11. **Opening figures for a mid-year start** (optional): Payroll & Tax → **TDS** → **Add opening figures**, for salary and tax already paid this financial year before you moved to Nexura.
12. **Approval rules** (optional): System Administration → **Workflow Rules**. Without any rules:
    - Leave, attendance and similar requests go to the reporting manager, or to HR/Admin when someone has no manager. Expense claims then go on to HR/Admin.
    - Salary revisions, promotions and job offers go to HR/Admin.
    - An HR user's change to an employee's manager or department goes to an Admin.
13. **Tell employees how to sign in:** share your Nexura address and ask them to click **Email me a sign-in code**. No logins to create (section 2.7). Create logins only for your HR team and other Admins, under System Administration → **Users & access**. If someone needs only part of HR, such as payroll or recruitment, give them a role there (see **Roles** in Part B).

2. Plans and pricing

Each plan includes everything in the plan above it, plus the modules listed. Modules your plan doesn't include stay visible in the sidebar with a lock; opening one shows **Not in your plan** with a **See plans** button. Every new workspace gets 15 days of the Professional plan free.

Plan	Price per employee (excl. GST)	Employees	Modules added
Starter	Free	Up to 10	Dashboard, My Portal (ESS), Organisation, Workforce (attendance, leave, shifts, holidays), System Administration
Essential	₹49 / month or ₹490 / year	Up to 100	Payroll & Tax, Policies & Compliance, Letters & Templates, Reports & Analytics, Time & Projects
Growth	₹89 / month or ₹890 / year	Up to 500	Talent Acquisition, Employee Lifecycle, Manager Self-Service, Reimbursements & Loans, HR Help Desk
Professional	₹139 / month or ₹1,390 / year	Unlimited	Performance, Learning & Development, Employee Engagement (all 18 modules)

Paid plans bill a minimum of 25 employees. You are billed on employees on record (everyone not marked resigned or terminated). 18% GST is added. To choose, change or cancel a plan, see **System Administration → Billing** in the Platform chapter.

3. Workspace and Core HR

This part of the guide covers two menu groups: **WORKSPACE** (Dashboard, My Portal, Manager Self-Service) and **CORE HR** (Talent Acquisition, Employee Lifecycle, Organization, Workforce, Time & Projects). There are four roles: Admin, HR, Manager and Employee. Your menu shows only the pages your role can open. Your company's subscription plan can also switch some pages off.

WORKSPACE

Dashboard

Your starting page. It shows key workforce numbers, things waiting for you, and shortcuts to common tasks. Everyone can use it, though some parts are only for HR/Admin or managers.

Overview

- **Who can use it:** Everyone. What you see depends on your role.
- **What it shows:**
    - **Admin and HR** see company-wide cards: Total Headcount (with departments and new hires this month), Present Today (compared with the same day last week), Pending Leave Approvals and On Probation.
    - **Managers** see the same four cards for their own team.
    - **Employees** don't see these cards.
    - Everyone sees a **Needs your attention** list, your five latest notifications under **Recent activity**, and the latest announcements.
- **What you can do:**
    - Click a number card or a **Review** → item to open the related page.
    - Click **View all** to see all your notifications.
    - Use the round **+** button (bottom right) for quick actions:
        - HR/Admin: Add Employee, Run Payroll, Post Announcement, Upload Document, Review Approvals.
        - Managers: Review Approvals, Team Attendance, Give Feedback, 1-on-1 Meeting.
        - Employees: Apply for Leave, Mark Attendance, Submit Expense, Upload Document.
- **How to clear your pending items:**
    1. Look at the **Needs your attention** box.
    2. Click a line, for example **Leave approvals**, to open that queue.
- **Good to know:**
    - This page is a summary. You make changes on the pages it links to.
    - For HR/Admin, **Needs your attention** counts leave, expense claims, investment proofs, profile changes and asset requests.

    - Managers see pending leave, expenses, overtime, comp-off and regularisations from their team.
    - Employees see their own pending leave and expense claims.
    - **All clear** means nothing is waiting.

Announcements

- **Who can use it:** Admin, HR and Managers. Employees read announcements in My Portal instead.
- **What it shows:** Every announcement in the company, with pinned posts at the top. Labels show each post's category, audience, and whether it is scheduled, expired or inactive. Policy and Urgent posts also show a **✓ X of Y acknowledged** counter.
- **What you can do:**
    - Search posts, and filter by category, audience and status.
    - Create a post with **＋ New Announcement**. You set the title, body, category (General, Policy, Event, Holiday, Benefits, System, Urgent), audience (everyone, managers, one department or one location), author, publish date, expiry date, whether it is pinned, and whether it is active.
    - **Edit** or **Delete** a post.
    - Click the acknowledgement counter to see who has and hasn't acknowledged. Then click 🔔 **Send reminder** to remind everyone who is still pending.
- **How to post an announcement:**
    1. Click **＋ New Announcement**.
    2. Fill in **Title** and **Body**, then pick a **Category** and **Audience**.
    3. If you like, set **Published On** (a future date schedules the post) and **Expires On**.
    4. Click **Post Announcement**.
- **Good to know:**
    - A post goes live on its publish date. People in the audience are notified then.
    - Editing a post that has already gone out doesn't notify people again.
    - Managers can post only to their own department, and can edit or delete only those posts.
    - When you delete a post, you're asked to confirm first. Deleting can't be undone, and the post's acknowledgements are removed too.
    - Only Policy and Urgent posts ask people to acknowledge them.

Announcement Acknowledgements

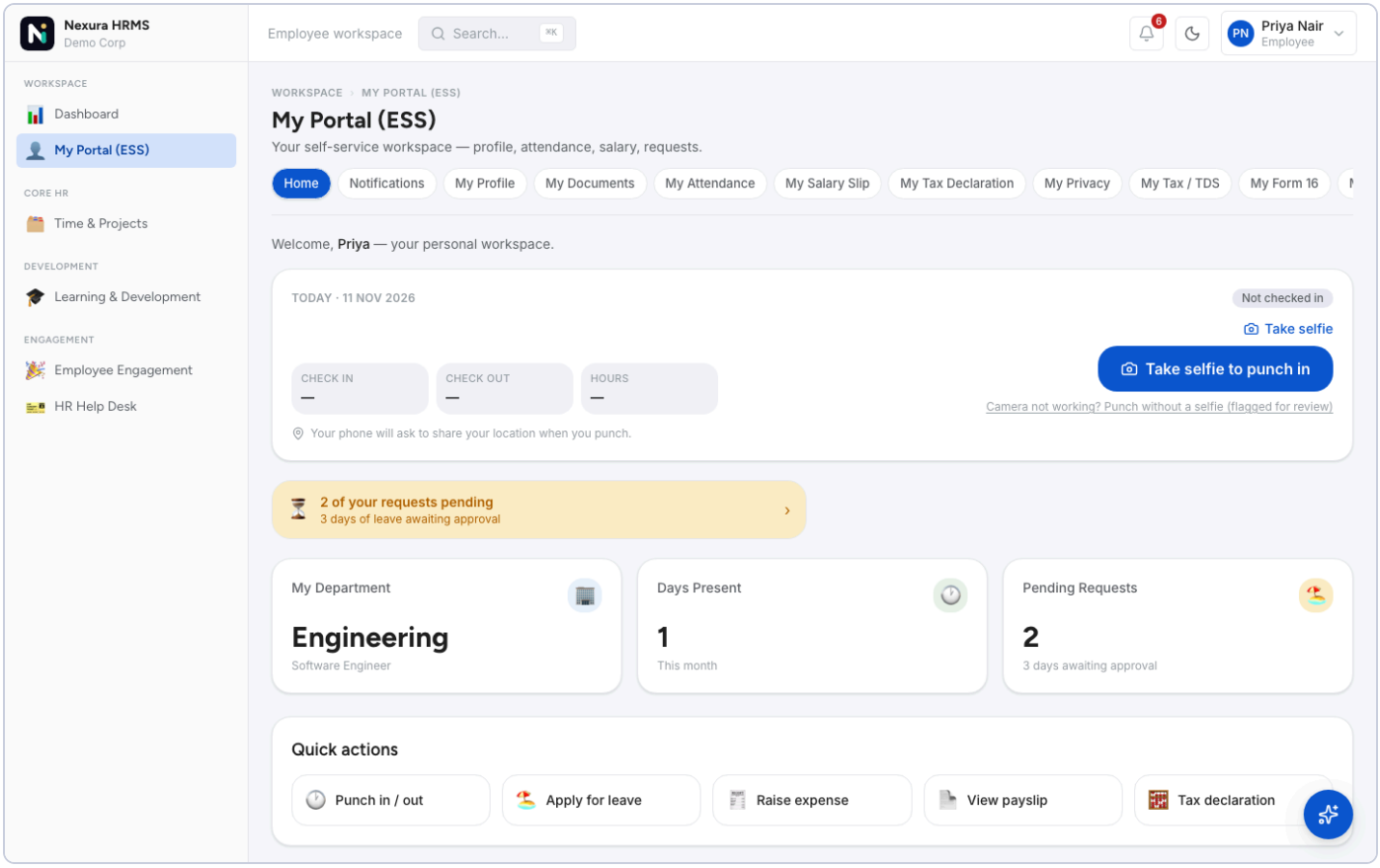
- **Who can use it:** Admin and HR.
- **What it shows:** How many people have acknowledged each published announcement. Each row shows the audience size, how many acknowledged, how many are still pending, and the acknowledgement rate. A coloured bar shows the rate: green for 90% or more, amber for 50–89%, red below 50%. The line at the top counts all published posts, the posts everyone has acknowledged, and the total acknowledgements.
- **What you can do:**
    - Filter by **All**, **Policy**, **Urgent** or **Benefits**.
    - Download the report with **⬇ Excel**.

- **How to check whether a policy was read:**
    1. Click **Policy**.
    2. Find the post and read its **Pending** count and **Ack rate**.
    3. Click ⬇ **Excel** to keep a copy.
- **Good to know:**
    - This page is for viewing only. To send reminders, use the Announcements page.
    - The expected audience is based on today's active headcount, not on who worked here when the post went out. So a rate can go above 100% if people have left since.
    - On this page, "Managers" means people who have someone reporting to them.
    - Scheduled posts are included once they have a publish date.

My Portal (ESS)

Your personal self-service area. Here you see and manage your own profile, attendance, pay, tax, leave and requests. Every role can use it. Your login must be linked to your employee record. If it isn't, most pages say "Your login isn't connected to an employee record yet", and an Admin can link it under System Administration → **Users & access**. Employees who sign in with an emailed code are linked automatically.

Home



An employee's self-service home page

- **Who can use it:** Everyone whose login is linked to an employee record.
- **What it shows:** Your personal home page, with:
    - today's punch card

    - pending items (approvals waiting on you, and your own leave still awaiting approval)
    - tiles for your department, days present this month and pending requests
    - quick actions
    - announcements
    - your leave balance for each leave type
    - recent notifications
    - key details (Employee ID, manager, joining date, status)
    - the next three holidays
- **What you can do:**
    - **Punch In** / **Punch Out** from the punch card. It works the same way as on My Attendance.
    - Use the quick actions: Punch in / out, Apply for leave, Raise expense, View payslip, Tax declaration.
    - Click **Install app** or **Enable phone alerts** when your device offers them.
    - Open related pages with **Manage**, **View all** and **View profile**.
- **How to punch in from Home:**
    1. On the **Today** card, click **Punch In**. If your company requires a selfie, take one first.
    2. Allow location access when your phone asks.
- **Good to know:** Leave balances are for the current leave year. **Recent activity** shows only your five latest notifications.

Notifications

- **Who can use it:** Everyone.
- **What it shows:** Your last 100 notifications, newest first. Each shows an icon (success, warning or info), a title, details, how long ago it arrived, and a **View** link when there's a related page. Unread items are highlighted. A count at the top shows the total and how many are unread.
- **What you can do:**
    - **Mark read** on one notification.
    - **Mark all read**.
    - **View** to open the related page.
    - Phone alerts (when your device supports them): **Enable phone alerts**, **Send test**, **Turn off** / **Turn on**.
- **How to turn on phone alerts:**
    1. In the **Phone alerts** card, click **Enable phone alerts**.
    2. Allow notifications when your browser asks.
    3. Click **Send test** to check that alerts arrive.
- **Good to know:**
    - Phone alerts depend on your device. On an iPhone, first add Nexura to your Home Screen.
    - Alerts never show amounts.
    - You can mark notifications as read, but you can't delete them.

My Profile

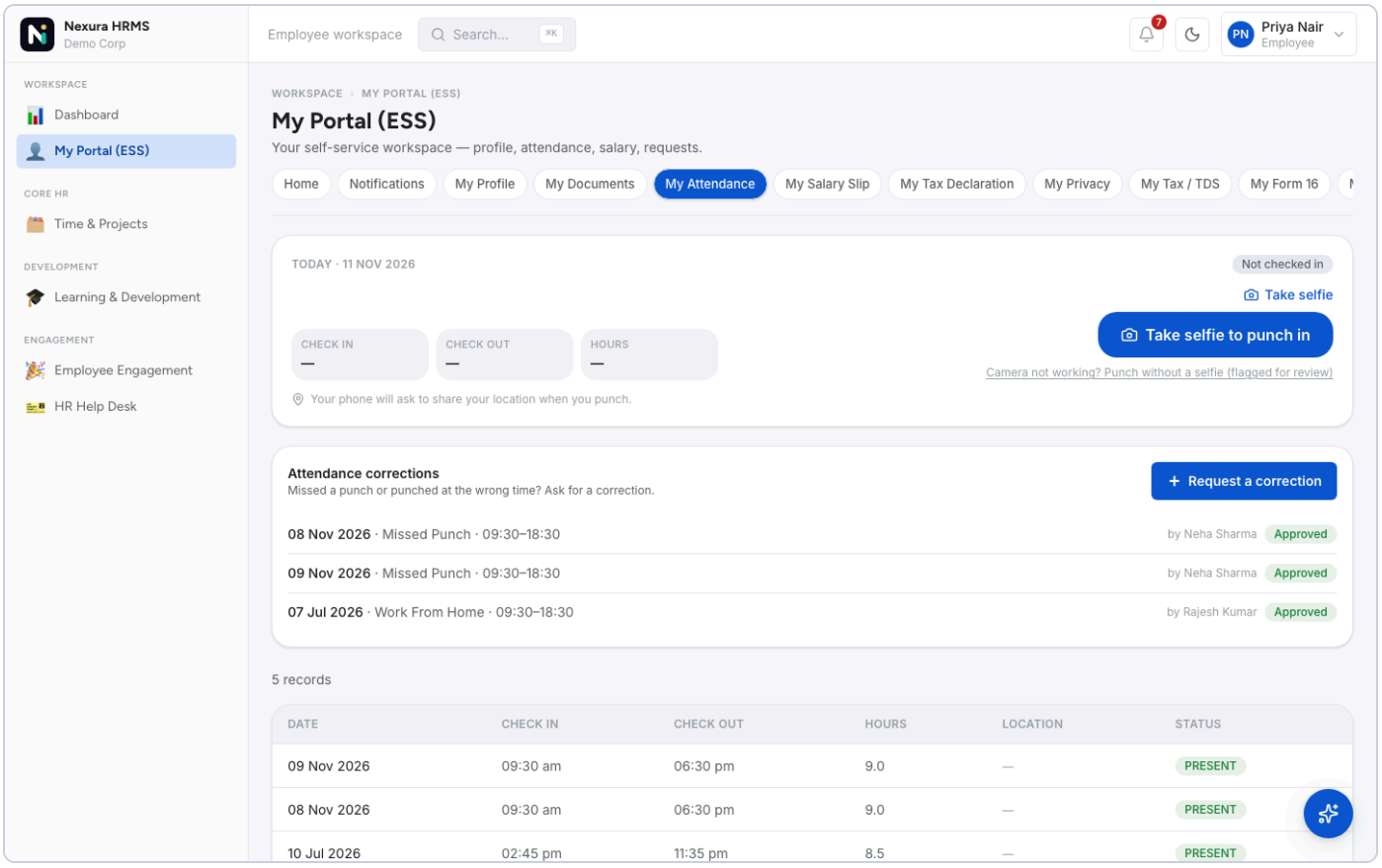
- **Who can use it:** Everyone. Managers, HR and Admin whose login isn't linked to an employee record still see the approval-delegation and sign-in sections.
- **What it shows:** Your record in four groups:
    - **Employment:** ID, department, designation, grade, location, manager, joining date, status
    - **Personal:** gender, marital status, date of birth, blood group, mobile, email
    - **Statutory:** Aadhaar, PAN, UAN, ESIC
    - **Bank:** bank, account number, branch, IFSC It also has sections for sign-in security, delegating your approvals, and your profile change requests.
- **What you can do:**
    - **+ Request a Change** to ask HR to update your mobile, personal email, marital status, blood group, bank details or emergency contact. Add a note if needed, then click **Submit Request**. You can **Withdraw** a request while it's still pending.
    - Manage two-step sign-in: **Set up two-factor**, **Verify & enable**, **Generate new codes**, **Disable**.
    - **Sign out everywhere**.
    - **Delegate approvals**: choose a colleague and a date range so they can approve requests waiting on you. Click **End** to stop a delegation.
- **How to update your bank account:**
    1. Click **+ Request a Change**.
    2. Edit the bank fields, add a note, and click **Submit Request**.
    3. Wait for HR to approve. The status shows Pending, Approved or Rejected.
- **Good to know:**
    - You can't edit your profile directly. HR approves every change.
    - You can have only one pending request at a time.
    - You can't request changes to your name, PAN, Aadhaar or employment details here. Contact HR for those.

My Documents

- **Who can use it:** Everyone whose login is linked to an employee record.
- **What it shows:** All documents on file for you. Tiles count your documents, the document types, and how many have a file attached. Each document shows its type, name, size, notes and upload date. Only you and HR can see them.
- **What you can do:**
    - **⬆ Upload Document**: choose the **Document Type** (PAN Card, Aadhaar Card, Educational Certificate, Experience Letter, Bank Proof, Address Proof, Other), enter a **Document Name**, add optional **Notes**, and attach the file.
    - **Download** a document.
    - **Delete** a document.
- **How to upload a document:**
    1. Click **⬆ Upload Document**.
    2. Choose the **Document Type** and enter a **Document Name**.
    3. Choose the file (up to 10 MB) and click **Upload**.

- **Good to know:**
    - Files can be up to 10 MB.
    - The list also includes documents HR has added to your record.
    - Proofs attached to your tax declaration can't be deleted here. Remove them from My Tax Declaration.
    - When you delete a document, you're asked to confirm first. Once deleted, it can't be recovered.

My Attendance

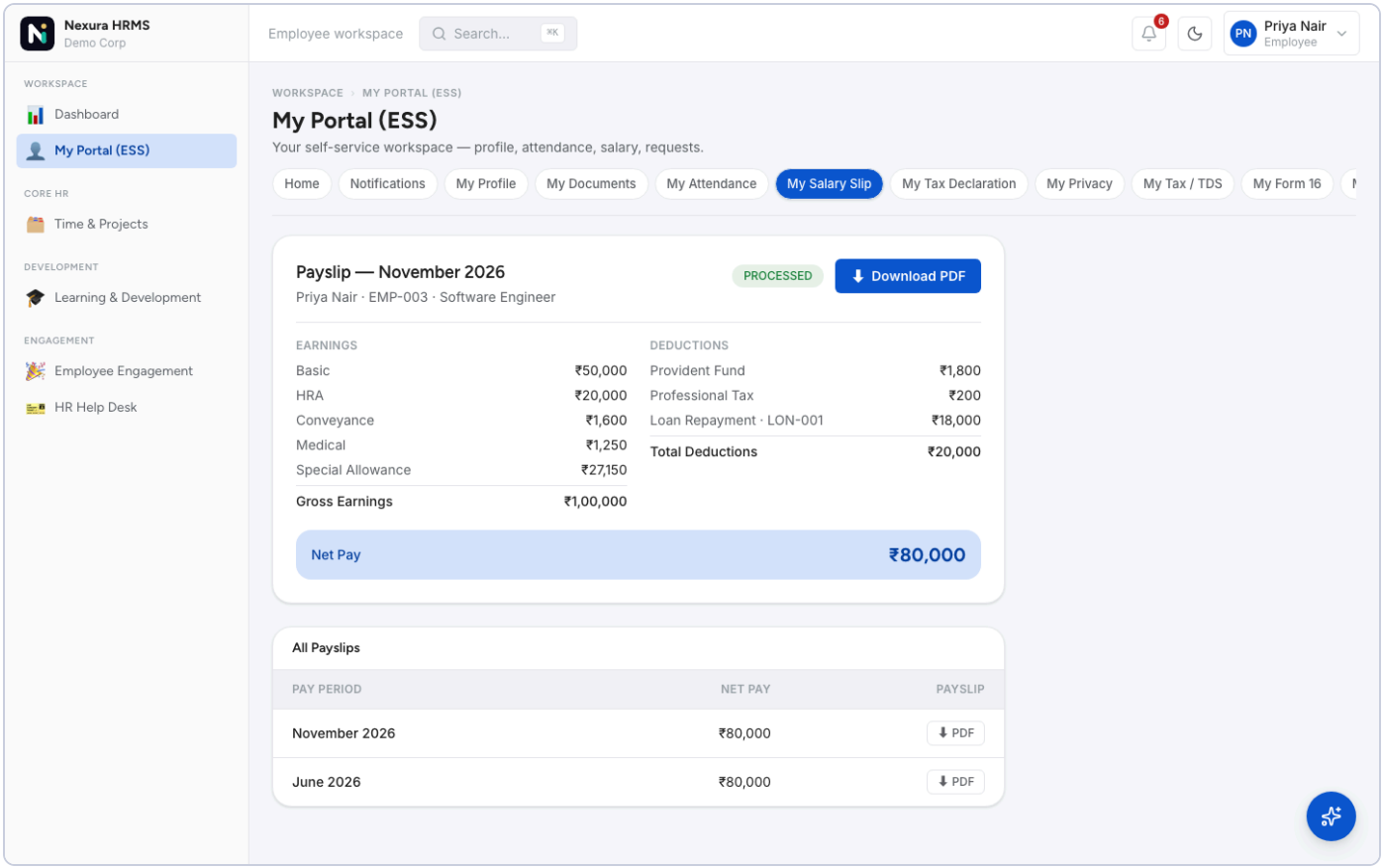


My Attendance

- **Who can use it:** Everyone whose login is linked to an employee record.
- **What it shows:** Today's punch card (check-in time, check-out time and hours worked) and your last 60 attendance records. Each record shows the date, check-in, check-out, hours, location result (**In fence** or ⚑ **Flagged**) and status (Present, Absent, Half day, On leave, Holiday, Weekend).
- **What you can do:**
    - **Punch In**, then later **Punch Out**.
    - **Take selfie** / **Retake selfie** when your company requires a selfie.
    - If something stops you punching: **Try again**, **Punch without location**, or **Punch without a selfie**. Both "without" options record your punch but flag it for HR to review.
- **How to mark today's attendance:**
    1. Click **Punch In** (or **Take selfie to punch in** first).
    2. Allow location access.
    3. At the end of the day, click **Punch Out**.

- **Good to know:**
    - You can punch in and out once per day.
    - You need an internet connection. Punches aren't saved offline.
    - A punch made outside your office geo-fence, without location, or without a required selfie is still recorded, but HR sees it flagged.
    - To fix a missed or wrong punch, click **+ Request a correction** under **Attendance corrections** on this page. Pick the **Type** and **Date**, enter the correct **From**/**To** times and a reason, and click **Submit**. You can't pick a future date, and you can have only one pending request per date.
    - Your last 10 correction requests are listed here with their status (Pending, Approved, Rejected), who decided, and any note. Once a request is approved, your attendance for that day is updated automatically.
    - This page shows your last 60 records.

My Salary Slip

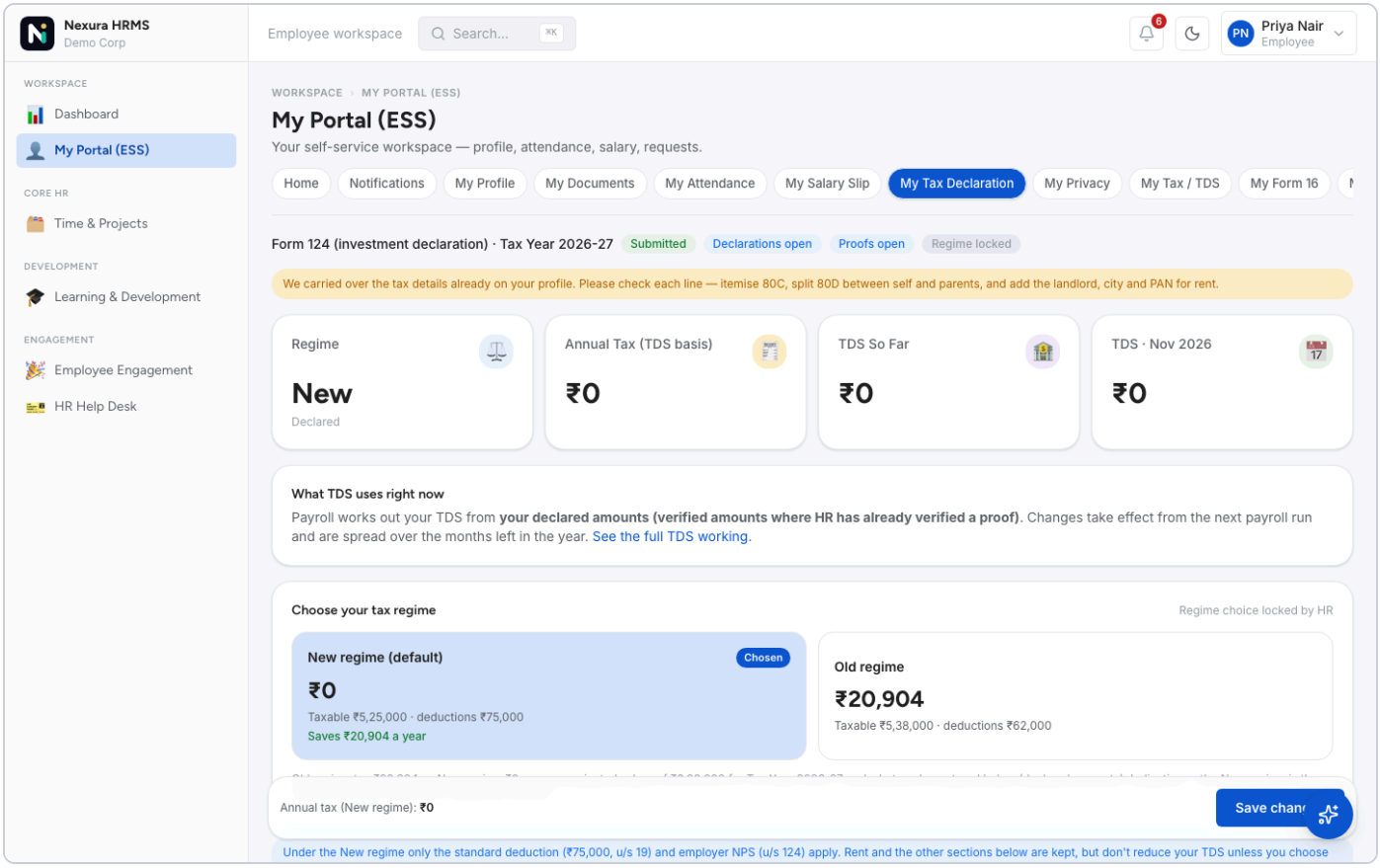


My Salary Slip

- **Who can use it:** Everyone whose login is linked to an employee record.
- **What it shows:** Your latest payslip: the month, payroll run status, earnings, Gross Earnings, deductions, Total Deductions and Net Pay. Below it, **All Payslips** lists every payslip you have, with its net pay.
- **What you can do:**
    - ⬇ **Download PDF** for the latest payslip.
    - ⬇ **PDF** for any earlier payslip in the list.

- **How to download a past payslip:**
    1. Scroll to **All Payslips**.
    2. Find the month and click ⬇ **PDF**. The PDF opens in a new tab.
- **Good to know:**
    - This page is for viewing only.
    - Payslips appear after HR runs payroll. Until then you'll see "No payslip has been generated for you yet."
    - The full on-screen breakdown is for the latest payslip. Open earlier months as PDFs.

My Tax Declaration



My Tax Declaration

- **Who can use it:** Everyone whose login is linked to an employee record.
- **What it shows:** Your income-tax declaration for the current financial year. Badges show your status (Not started, Draft, Submitted, Locked by HR) and whether declarations and proofs are open, with any deadlines. Tiles show your regime, annual tax, TDS so far and this month's TDS. A panel, **What TDS uses right now**, explains which figures payroll is using.
- **What you can do:**
    - Choose the New or Old regime. When you have a salary structure, you'll see a side-by-side tax comparison.
    - Add lines under:
        - House rent (HRA): **Add rent period**, with the HRA city and your landlord's PAN
        - 80C investments

        - NPS, including Employer NPS (for your records only)
        - Health insurance (80D), with ticks for senior citizens
        - Home-loan interest, with your lender's PAN
        - Education-loan interest
        - Donations (80G), with the donee's details
        - Interest income
    - **+ I had a previous employer this year**: enter that employer's salary and TDS.
    - **Upload proof** for each saved line (PDF or photo, up to 10 MB), and **Remove** a proof.
    - **Save draft**, **Submit declaration** or **Save changes**.
- **How to submit your declaration:**
    1. Pick your regime.
    2. Add your rent and investment lines with their amounts.
    3. Click **Submit declaration**.
    4. When proofs open, attach a proof to each line with **Upload proof**.
- **Good to know:**
    - Payroll uses your declaration for TDS only after you submit it. A draft isn't used.
    - Changes apply from the next payroll run.
    - HR can close the declaration window, lock your regime, or lock your declaration.
    - Once HR applies verified proofs, lines without a verified proof count as ₹0.
    - Previous-employer figures count only after HR verifies them.
    - Most deductions reduce tax only under the Old regime.

My Tax / TDS

- **Who can use it:** Everyone whose login is linked to an employee record.
- **What it shows:** A projection of your income tax for the current financial year, worked out the same way payroll deducts TDS. Tiles show Projected Salary, Annual Tax, TDS So Far and this month's TDS (marked **Deducted** or **Projected**). The page also explains:
    - how this month's TDS is worked out (salary so far, the rest of the year, TDS already deducted, and the months left)
    - your declarations
    - the full calculation (exemptions, standard deduction, taxable income, rebate, surcharge, cess)
    - the tax for each slab
- **What you can do:** This page is for viewing only. To change what the projection uses, go to My Tax Declaration.
- **How to understand this month's TDS:**
    1. Read **How this month's TDS is worked out** from top to bottom.
    2. Check **Computation** to see your taxable income and total tax.
- **Good to know:**
    - The figures are a guide and may change after HR verifies your proofs.
    - If you don't have a salary structure yet, the page says there's no projection.

    - Salary and TDS from a previous employer or an earlier payroll system are included only once HR has recorded them.

My Form 16

- **Who can use it:** Everyone whose login is linked to an employee record.
- **What it shows:** Your Form 16 (Part B) summary for the current financial year. Tiles show your PAN, Tax Liability, TDS Deducted, and Balance Payable or Excess / Nil. Below are your declarations and a table of this year's payslips with gross pay, TDS and net pay.
- **What you can do:**
    - ⬇ **Part B**: download the Part B PDF.
    - ⬇ **Part A (TRACES)**: download Part A, once HR has uploaded it.
- **How to get your Form 16:**
    1. Click ⬇ **Part B** to download Part B.
    2. If Part A is ready, click ⬇ **Part A (TRACES)**. If not, the page says "Part A not uploaded by HR yet".
- **Good to know:**
    - This page is for viewing only.
    - It covers the current financial year. You can't pick earlier years here.
    - Part B is built from your payslips for the year. The official certificate is issued after year-end reconciliation, and HR uploads Part A separately.

My Leave

- **Who can use it:** Everyone whose login is linked to an employee record.
- **What it shows:** This is your leave page. It shows a balance card for each leave type in the current leave year, with Available, Used, Pending and Entitled days, plus Credited and Brought forward where they apply. Below the cards is every leave request you've raised, with its dates, days, decision date and status (Pending, Approved, Rejected, Cancelled).
- **What you can do:**
    - ＋ **Apply for Leave**: choose the **Leave Type**, **From** and **To** dates, and **Duration** (full day, first half or second half). Add a reason if you like, then click **Submit Request**.
    - **Cancel request** while a request is still pending.
    - **Approval trail** shows who has acted on a request.
- **How to apply for leave:**
    1. Click ＋ **Apply for Leave**.
    2. Choose the **Leave Type** and the **From** and **To** dates. For a half day, use the same date in both and pick a half.
    3. Click **Submit Request**. Your approver is notified.
- **Good to know:**
    - Weekly offs and holidays aren't counted as leave days.
    - You can't apply for dates that overlap leave that's pending or approved.
    - Whether you can go beyond your balance depends on the leave type's settings.
    - You can't cancel approved leave here. Contact your manager or HR.

    - Approvals you need to give others are in Pending Approvals.

Expenses

- **Who can use it:** Everyone whose login is linked to an employee record.
- **What it shows:** Your own expense claims, with the description, claim code, category, date incurred, amount and status. Summary cards show My Claims, Claimed (total amount), In Progress and Reimbursed (amount).
- **What you can do:**
    - Raise a new expense claim.
    - Withdraw a claim that's still waiting for approval.
    - Open the **Approval trail** of any claim to see who has acted on it.
- **How to raise an expense claim:**
    1. Click **New Claim**.
    2. Choose a **Category** (Travel, Meals, Accommodation, Office Supplies, Client Entertainment, Training, Communication, Other). Enter **Amount (₹)** and **Incurred On**. If you like, add a **Receipt Ref** and **Description**.
    3. Click **Submit Claim**. To cancel it later, click **Withdraw** on the row.
- **Good to know:**
    - Amounts are in whole rupees.
    - You can't attach a file. Type the receipt's reference number in **Receipt Ref** and keep the receipt in case HR asks for it.
    - A claim goes to your manager first, then HR/Admin, or to the approvers set in your company's approval rules.
    - Once a claim is approved, you can't withdraw it.

My Assets

- **Who can use it:** Everyone whose login is linked to an employee record.
- **What it shows:** Two tables. **My Assets** lists company items assigned to you (asset tag, type, model, issue date, and condition such as Good, Damaged or Return Pending). **My Requests** lists asset requests you've raised, with status (Open, Approved, Rejected, Fulfilled) and any note from HR. Cards show My Assets, Need Attention, My Requests and Open Requests.
- **What you can do:**
    - Request a new asset.
    - Withdraw a request while it's still Open.
- **How to request an asset:**
    1. Click **Request Asset**.
    2. Pick the item under **What do you need?** (Laptop, Desktop, Monitor, Mobile Phone, SIM Card, Access Card, Headset, Docking Station, Software License, Other). Add a **Justification** if you like.
    3. Click **Submit Request**. HR and Admin are notified.
- **Good to know:**
    - The assets list is for viewing only. HR records changes in condition and returns.

    - HR/Admin review requests, not your manager.
    - A withdrawn request is removed from the list.

My Loans

- **Who can use it:** Everyone whose login is linked to an employee record.
- **What it shows: My Loans** lists your loans and salary advances (loan code, type, principal, monthly EMI, outstanding balance, and status: Active, Closed, Defaulted, On Hold). **My Requests** lists your loan and advance requests with status (Pending, Approved, Rejected) and any decision note. Cards show Active Loans, Outstanding (total), My Requests and Pending.
- **What you can do:**
    - Request a loan or salary advance.
    - Withdraw a request while it's still Pending.
- **How to request a loan or advance:**
    1. Click **Request Loan / Advance**.
    2. Choose a **Type** (Personal Loan, Salary Advance, Education Loan, Medical Loan). Enter **Amount (₹)** and **Monthly EMI (₹)**, and a **Reason** if you like.
    3. Click **Submit Request**. HR and Admin are notified.
- **Good to know:**
    - You propose the EMI yourself. It can't be more than the total amount.
    - The app doesn't work out interest or tenure for you.
    - HR/Payroll maintain loan balances. You can view them here.

Performance

- **Who can use it:** Everyone whose login is linked to an employee record.
- **What it shows:** Your appraisal history (cycle, stage, self rating, manager rating, final rating, potential) and your goals with type, period, weight, target and a progress bar. Cards show My Appraisals, Current Stage, My Goals and Avg Progress.
- **What you can do:**
    - Submit your self-assessment rating, when your latest appraisal is at the Self Assessment stage.
    - Update the progress % and status of each of your goals.
- **How to submit your self-assessment and update goals:**
    1. When the **Self Assessment** box appears, enter a **Self Rating** from 0 to 5 and click **Submit Self Assessment**. Your appraisal then moves to Manager Review.
    2. To update a goal, change **Progress %** and/or **Status** (Not Started, On Track, At Risk, Behind, Completed, Deferred) and click **Update**.
- **Good to know:**
    - Your self-assessment is a single rating. There's no comments box, so share any context with your manager directly.
    - Once submitted, you can't change it here.
    - Your manager or HR sets your goals. You can't add or delete them.
    - Manager and final ratings are for viewing only.

Learning

- **Who can use it:** Everyone whose login is linked to an employee record.
- **What it shows:** A card for each course you're enrolled in, with code, category, type, mode, duration, status, enrolled date, completed date and score. Summary cards show Enrolled Courses, Completed, In Progress and Overdue / Missed.
- **What you can do:**
    - Browse the course catalogue and enrol yourself.
    - Start a course.
    - Mark a course complete.
- **How to take a course:**
    1. Click **Browse Catalog**. The badge shows how many courses you aren't enrolled in yet.
    2. Select a course and click **Enrol**.
    3. On the course card, click **Start Course**. When you finish, click **Mark Complete**.
- **Good to know:**
    - This is where employees enrol in courses and update their progress. The Learning & Development pages (Calendar, E-Learning, Certifications) are for viewing only for employees.
    - **Mark Complete** records today as your completion date. There's no test or approval step.
    - HR enters scores.
    - The catalogue shows every company course you aren't already enrolled in.
    - You can't un-enrol here. Ask HR if you need to.

360° Feedback

- **Who can use it:** Everyone. The "feedback about you" part needs your login to be linked to an employee record.
- **What it shows:** For each review cycle, **Feedback received** lists one row per group (You, Manager, Peers, Direct reports, Skip-level managers, External reviewers) with how many responded and the group's average rating, plus **Average from others**. Cards at the top show Reviewers, Submitted, Pending and Avg from Others. If others have asked you to review them, a **Feedback requested from you** section lists those people.
- **What you can do:**
    - Submit your own 360° self-review rating.
    - Give a rating to a colleague who has named you as a reviewer.
    - Decline a feedback request.
- **How to give feedback:**
    1. Under **Feedback requested from you**, enter an **Overall rating (0–5)** and click **Submit Feedback**, or click **Decline**.
    2. If you see "Your self-review is pending", enter your rating and click **Submit Self-Review**.
- **Good to know:**
    - Feedback is one overall rating, in half-point steps. There's no space for written comments.
    - Once you submit or decline, you can't change it.

    - HR sets up review requests.
    - Feedback from colleagues is anonymous. You see only each group's average, never who gave which rating, and a group's average appears only once at least 2 people in it have responded. Your manager's rating is shown as given.
    - **Average from others** leaves out your own rating and any group that is still hidden.

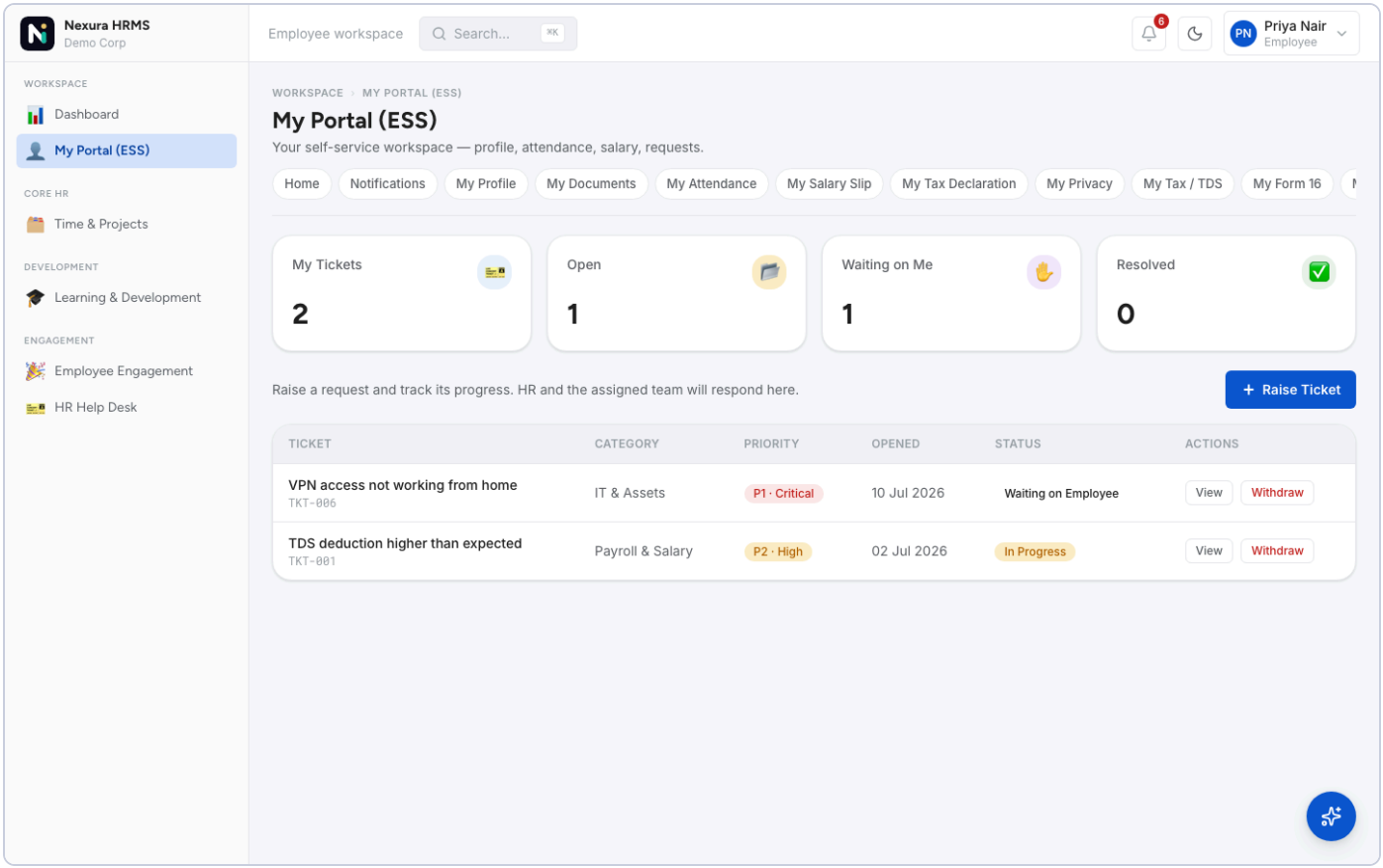
My PIP

- **Who can use it:** Everyone whose login is linked to an employee record.
- **What it shows:** Any Performance Improvement Plans on record for you, current or past. Each card shows the reason, start and end dates, length in days, status, your manager and HR partner, and up to two goals with their measure and target.
- **What you can do:** This page is for viewing only.
- **How to review your plan:**
    1. Open **My PIP** from My Portal.
    2. Read each plan's goals, measures and target dates, and discuss progress with your manager or HR partner.
- **Good to know:** HR and your manager create and update PIPs. A plan appears here only once it has started; drafts they're still preparing aren't shown. If you don't have one, the page says you have no active or past improvement plans.

POSH / Grievance

- **Who can use it:** Everyone.
- **What it shows:** Your company's commitment under the Prevention of Sexual Harassment (POSH) Act, 2013, in three panels: **Your Rights**, **How to Raise** and **Timeline**. Below them is the Internal Committee (ICC) panel, with each active member's name, organisation, role (Presiding Officer, Internal Member, External Member, Member Secretary), email and phone.
- **What you can do:** This page is for information only.
- **How to raise a concern:**
    1. Open **POSH / Grievance** from My Portal.
    2. Find the ICC member or Member Secretary you'd like to contact, and use the email or phone shown.
- **Good to know:**
    - You can't file a complaint through this page. Contact an ICC member directly, and they'll guide you through the confidential process.
    - If no members are listed, contact HR.

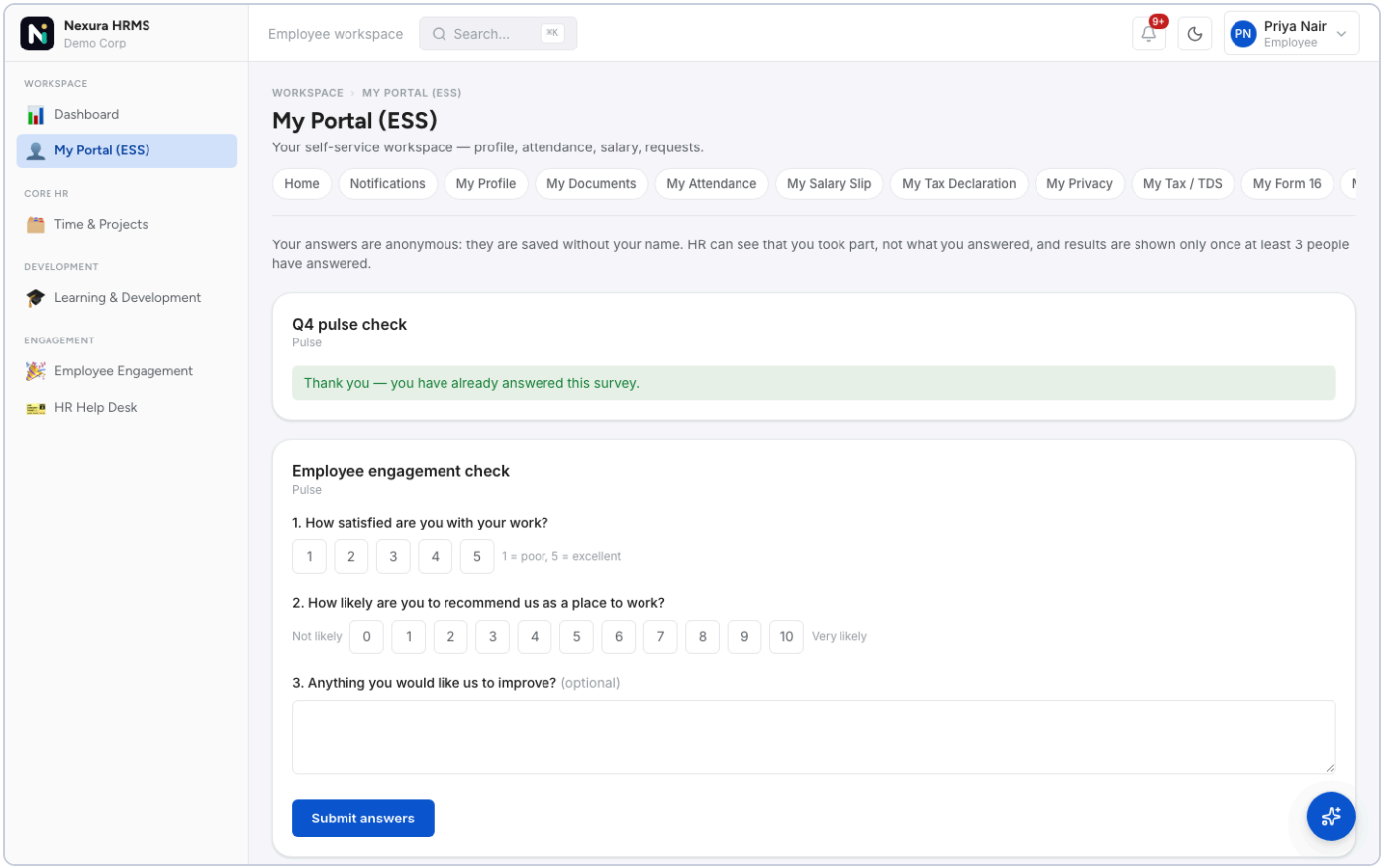
HR Helpdesk



Raising an HR help desk ticket

- **Who can use it:** Everyone whose login is linked to an employee record.
- **What it shows:** Your own helpdesk tickets (subject, ticket code, category, priority, opened date, status). Cards show My Tickets, Open, Waiting on Me and Resolved.
- **What you can do:**
    - Raise a new ticket.
    - View the conversation on a ticket and reply.
    - Withdraw a ticket that isn't resolved or closed yet.
- **How to raise a ticket:**
    1. Click **Raise Ticket**. Enter a **Category** (type your own or pick a suggestion such as Payroll & Salary, Leave & Attendance, IT & Assets). Choose a **Priority** from P1 Critical to P4 Low (P3 Normal is the default). Enter a **Subject** and, if you like, a **Description**. Click **Submit Ticket**.
    2. To follow up, click **View**, type in **Add a reply**, and click **Send Reply**.
- **Good to know:**
    - You can't attach files.
    - You see only the replies meant for you. HR's internal notes are hidden.
    - Withdrawing a ticket closes it. You can't reply to a closed ticket.

Surveys



Answering a survey in My Portal

- **Who can use it:** Everyone with a linked employee record.
- **What it shows:** The surveys that are open for you right now (Live, and inside their dates). A survey you've already answered shows a thank-you instead of the questions.
- **How to answer a survey:**
    1. Open **My Portal** → **Surveys**.
    2. Answer each question: pick a number for ratings, and type in the box for comments (comments are optional).
    3. Click **Submit answers** and confirm.
- **Good to know:**
    - Your answers are anonymous. They are saved without your name; HR can see that you took part, not what you answered.
    - You can't change your answers after you submit, and you can only answer each survey once.
    - Results are only shown to HR once at least 3 people have answered.

Holiday List

- **Who can use it:** Everyone.
- **What it shows:** Your company's holidays for this calendar year, upcoming ones first. Each shows the date, weekday, holiday name and whether it's **Upcoming** or **Past**. The heading shows how many holidays there are this year and how many are still to come, for example "12 holidays in 2026 · 3 upcoming".
- **What you can do:** This page is for viewing only.
- **How to check the next holiday:**

1. Open **Holiday List** from My Portal.
2. The holidays at the top are the next ones coming up.

- **Good to know:**
    - HR maintains the holiday list.
    - Everyone sees the same list. It isn't filtered by your location.

Internal Jobs

- **Who can use it:** Everyone.
- **What it shows:** A card for every open job, with title, department, location, number of openings, posted date and hiring manager. Cards at the top show Open Roles, Total Positions and Departments Hiring.
- **What you can do:**
    - Apply for a role yourself.
    - Refer someone from outside for a role.
- **How to apply or refer:**
    1. To apply, click **Apply** on the job card. Your name and sign-in email are added as a candidate for that role.
    2. To refer someone, click **Refer**. Enter the **Candidate Name**, and if you like **Email**, **Phone** and **Experience**. Then click **Submit Referral**.
- **Good to know:**
    - You won't see a confirmation message after you click **Apply**. If you apply twice for the same role, you're only added once.
    - You can't upload a CV here. Share it with HR directly.
    - Referrals are recorded with your name as the source.
    - You can't track your application's progress on this page. Ask HR for an update.

HR Policies

- **Who can use it:** Everyone.
- **What it shows:** All published HR policies, grouped by category. Each shows the policy name, version, a short summary, owner and effective date.
- **What you can do:** This page is for viewing only.
- **How to find a policy:**
    1. Open **HR Policies** from My Portal.
    2. Scroll to the category you need and read the policy summary.
- **Good to know:**
    - You see only policies HR has published. Drafts are hidden.
    - The page shows the summary only. To get the full document, ask HR.

Announcements

- **Who can use it:** Everyone.
- **What it shows:** Company announcements meant for you, pinned ones first, then newest first. Each shows the title, category (General, Policy, Event, Holiday, Benefits, System, Urgent), audience tag,

message, author and date.

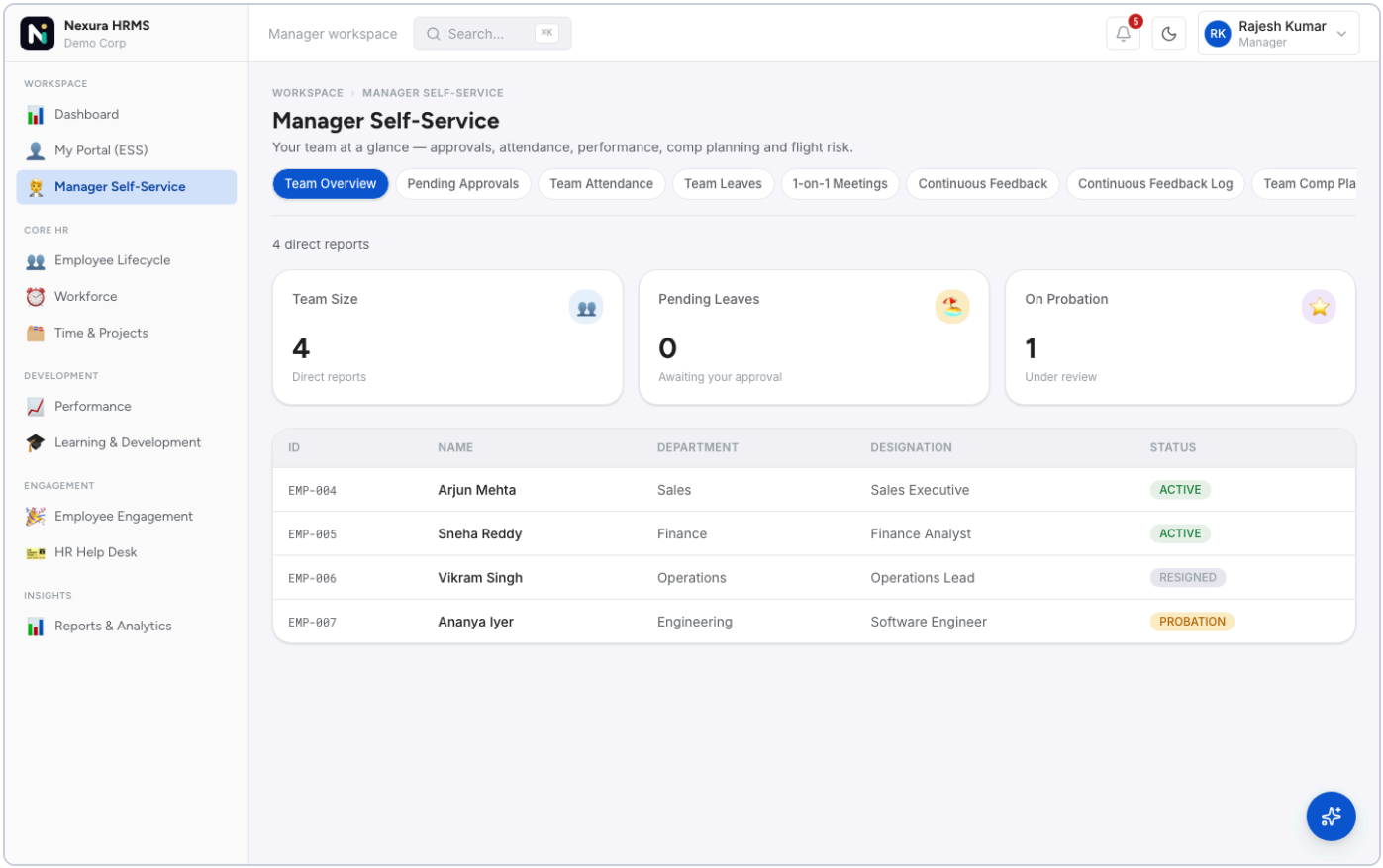
- **What you can do:** Acknowledge Policy and Urgent announcements.
- **How to acknowledge an announcement:**
    1. Open **Announcements** from My Portal and read the latest posts.
    2. On a Policy or Urgent post, click **Acknowledge**. It then shows ✓**Acknowledged**.
- **Good to know:**
    - You see announcements meant for everyone, for your department or location, and (if you're a manager, HR or Admin) for managers.
    - Expired posts and posts scheduled for later are hidden.
    - The **Acknowledge** button appears only if your login is linked to an employee record.
    - HR and managers post announcements from the Dashboard's Announcements page.

Manager Self-Service

Your team in one place: approvals, attendance, leave, 1-on-1s, feedback, pay and promotion nominations, and attrition risk. Admin, HR and Managers can use it. Employees don't see it.

> **Good to know for everyone using this module:** the team pages (Team Overview, Team Attendance, Team Leaves, 1-on-1 Meetings, Continuous Feedback, Team Comp Plan, Promotion Cases, Flight Risk) show only the people who report **directly to you**, meaning employees whose Reporting Manager is set to you. This is true for Admin and HR users too. If your login isn't linked to your employee record, or nobody has you as their manager, these pages are empty. The three report pages (Continuous Feedback Log, Retention Action Tracker, Asset Request Queue) show the whole company to Admin and HR, and only direct reports to Managers.

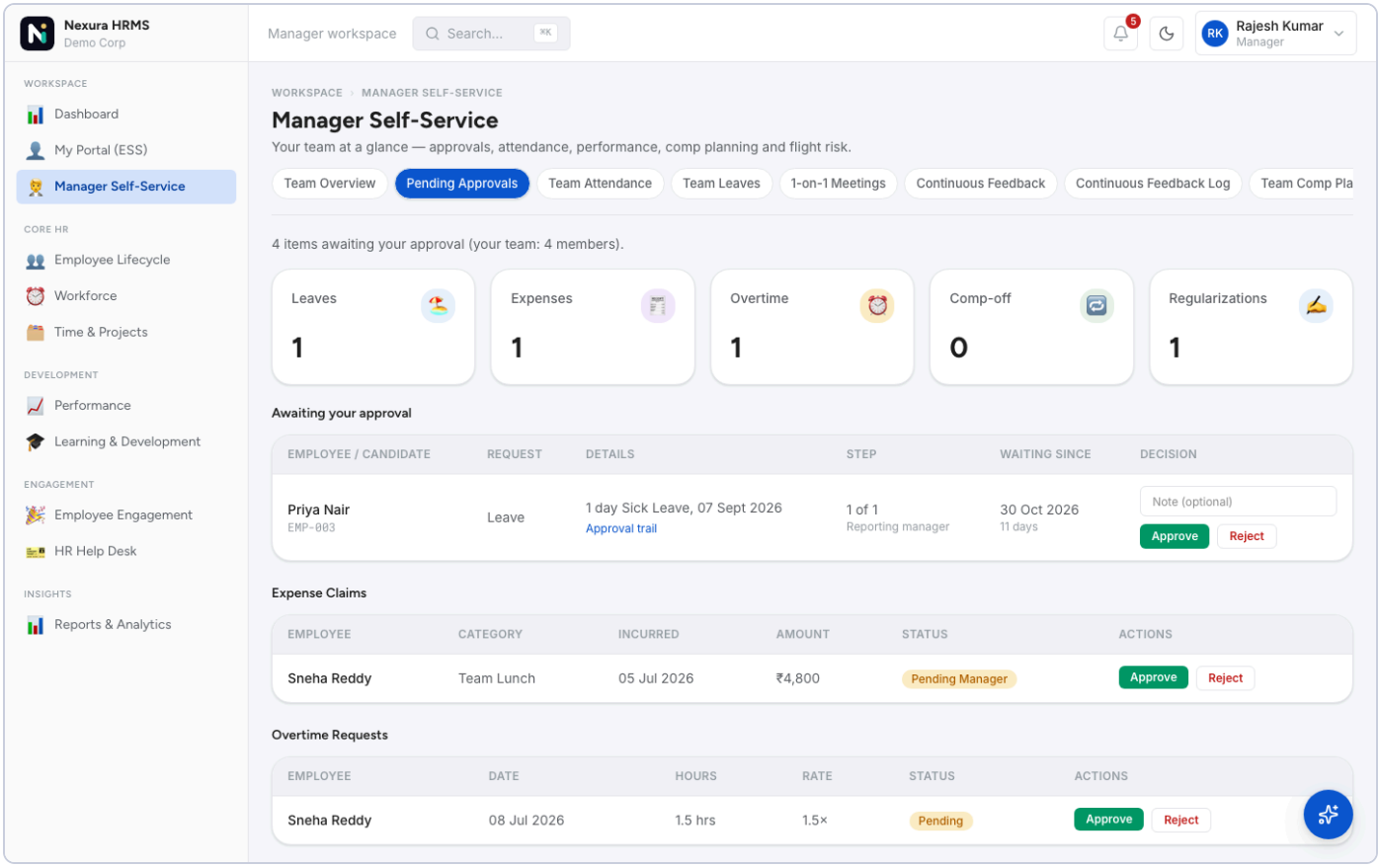
Team Overview



A manager's team overview

- **Who can use it:** Admin, HR and Managers.
- **What it shows:** Three tiles: Team Size (your direct reports), Pending Leaves (team leave requests still awaiting a decision) and On Probation. Below them is a list of your direct reports with their employee ID, name, department, designation and status (Active, Probation, Notice, Resigned, Terminated).
- **What you can do:** This page is for viewing only.
- **How to check on your team:**
    1. Open **Manager Self-Service** → **Team Overview**.
    2. Check the tiles for anything that needs attention, then use the other tabs (for example Team Leaves) to act on it.
- **Good to know:**
    - Only your direct reports are listed, not their own teams.
    - If you see "No direct reports linked to your profile.", ask HR to set you as the Reporting Manager on your team members' records.

Pending Approvals



Pending approvals

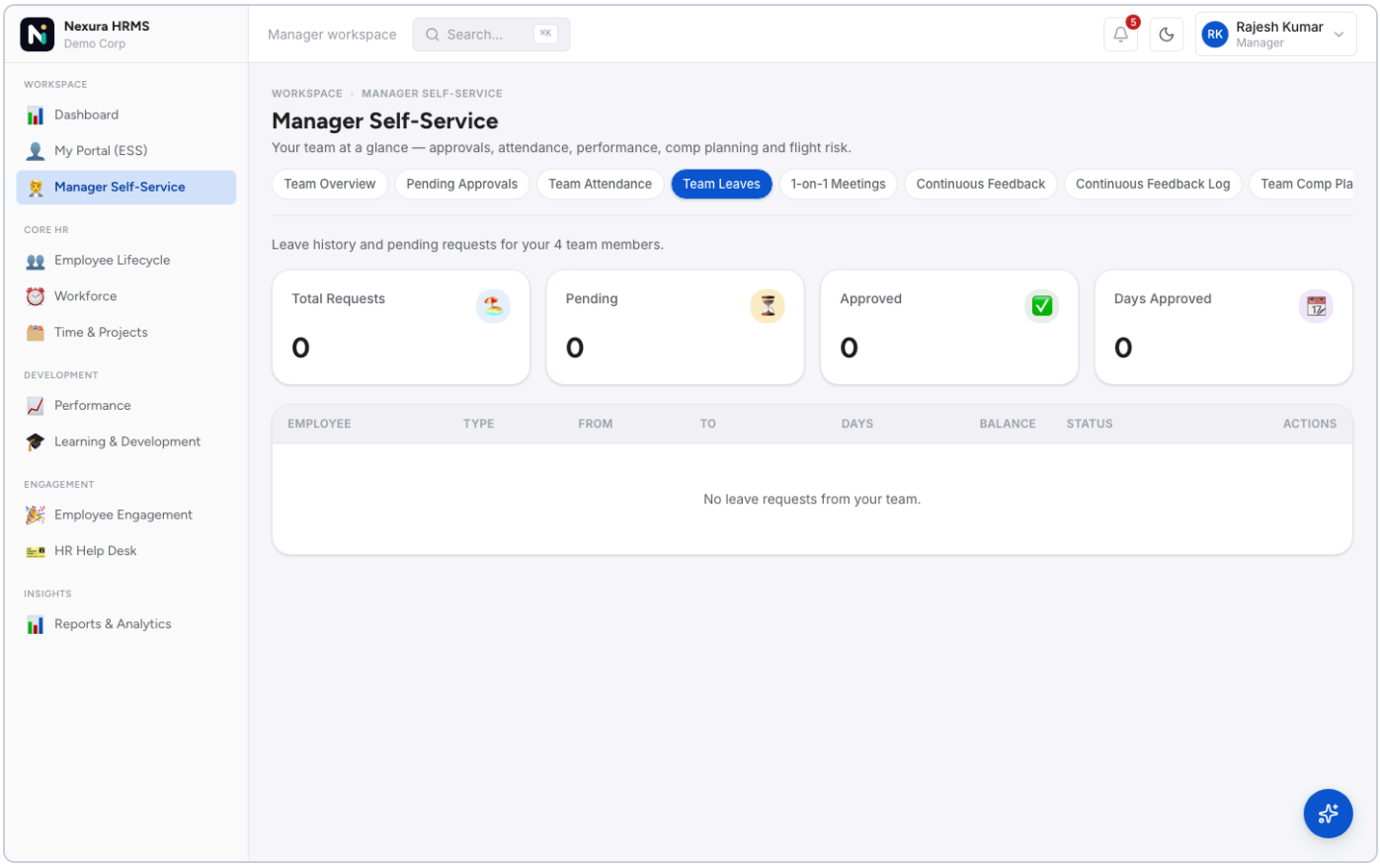
- **Who can use it:** Admin, HR and Managers see it in the menu. Anyone who has been made an approver (or a delegate) in your company's approval rules can also open it, for example from the **Approvals** tab on the mobile bar.
- **What it shows:** Everything waiting for your decision. Tiles count Leaves, Expenses, Overtime, Comp-off and Regularisations. When you have them waiting, tiles for Salary revisions, Promotions, Job offers and Org changes (reporting manager or department changes) appear too. Requests that follow an approval rule appear under **Awaiting your approval**, with the first column showing the **Employee / candidate**, the step number (for example "1 of 2"), how long it has waited, and a **past SLA** warning if it's overdue. Other team requests appear in separate sections: Leave Requests, Expense Claims, Overtime Requests, Comp-off Requests and Attendance Regularizations.
- **What you can do:**
    - **Approve** or **Reject** each request.
    - Add a note when deciding a request that follows an approval rule.
    - Open the **Approval trail** link to see a request's history.
- **How to decide a request:**
    1. Open **Manager Self-Service** → **Pending Approvals**.
    2. Review the request details, and the **Approval trail** if you need it.
    3. If you like, type a note in **Note (optional)**. Then click **Approve** or **Reject**. You'll see "Decision recorded."
- **Good to know:**
    - When a manager approves an expense claim, it moves to **Pending HR**. It's fully approved once HR approves it too.

- If you're acting for someone who delegated to you, the step shows **as delegate**.
- Salary revisions, promotions, job offers and org changes are explained in the chapter *Sign-in options, privacy and approvals*.
- When nothing is waiting, you'll see "Your approval inbox is empty — nothing pending."
- The same page is also listed under Workforce → Approval Inbox.

Team Attendance

- **Who can use it:** Admin, HR and Managers.
- **What it shows:** Recent attendance records for your direct reports: employee, date, check-in, check-out, hours worked and status (Present, Absent, Half Day, On Leave, Holiday, Weekend). Tiles count total records, Present, On Leave and Absent.
- **What you can do:** This page is for viewing only.
- **How to spot gaps:**
    1. Open **Manager Self-Service** → **Team Attendance**.
    2. Scan the list (newest first) for absences or missing check-outs.
- **Good to know:**
    - To correct a record, use Regularization or the Workforce → Attendance page.
    - The page shows the **latest 60 records** across your whole team. For a larger team, that may cover only a few days. The tiles count those 60 records, not a full month.
    - There are no date or employee filters. For a longer view, use Attendance Summary.

Team Leaves



Team leaves

- **Who can use it:** Admin, HR and Managers, for their own direct reports.
- **What it shows:** All leave requests from your direct reports, newest first: leave type, from and to dates, number of days and status. For pending requests, the **Balance** column shows what the employee will have left for that leave type after pending requests (in red if it goes below zero). Tiles show Total Requests, Pending, Approved and Days Approved.
- **What you can do:**
    - **Approve** or **Reject** a pending request.
    - Follow the link to the approval trail when someone else needs to act on the current step.
- **How to decide a leave request:**
    1. Open **Manager Self-Service** → **Team Leaves**.
    2. Find a Pending request and check the **Balance** column.
    3. Click **Approve** or **Reject**.
- **Good to know:**
    - If the request follows an approval rule and it isn't your step, you'll see who it's waiting on instead of the buttons.
    - You can never approve your own leave.
    - There's no space for a note here. To add one, decide the request from Pending Approvals.

1-on-1 Meetings

- **Who can use it:** Admin, HR and Managers, for their own direct reports.
- **What it shows:** Your 1-on-1 meetings with team members: date, duration, status (Scheduled, Completed, Cancelled, Rescheduled), agenda, notes and action items. Tiles count Meetings, Scheduled, Completed and Team Size.
- **What you can do:**
    - **Log 1-on-1** to record a meeting.
    - **Edit** a meeting to update notes, status or action items.
    - **Delete** a meeting.
- **How to log a 1-on-1:**
    1. Click **+ Log 1-on-1**.
    2. Choose the **Team Member** and enter the **Date**. Add **Duration (mins)**, **Status**, **Agenda**, **Notes** and **Action Items** as needed.
    3. Click **Log Meeting**. Later, click **Edit** on the meeting card, update it (for example set **Status** to Completed and add notes) and click **Save Changes**.
- **Good to know:**
    - This is a record of your meetings. It doesn't send calendar invites or reminders, so schedule the meeting in your calendar as usual.
    - When you delete a meeting, you're asked to confirm first. This can't be undone.
    - You can log meetings only for your own direct reports.

Continuous Feedback

- **Who can use it:** Admin, HR and Managers, for their own direct reports.

- **What it shows:** Feedback notes recorded for your direct reports: type (Praise, Constructive, Coaching, Recognition), message, who gave it and when. Tiles count Feedback Given, Praise / Recognition, Coaching (includes Constructive) and Team Size.
- **What you can do:**
    - **Give Feedback** to a team member.
    - **Delete** a feedback note.
- **How to give feedback:**
    1. Click **+ Give Feedback**.
    2. Choose the **Team Member**, pick a **Type**, and write the **Message**.
    3. Leave **Visible to the employee** ticked if you want them to see it, or untick it to keep the note private. Click **Share Feedback**.
- **Good to know:**
    - When you untick **Visible to the employee**, the employee doesn't see that note. Notes saved earlier stay visible to the employee.
    - You can't edit feedback after saving. To change it, delete it and add it again. You'll be asked to confirm the delete.
    - Feedback is recorded with today's date.

Continuous Feedback Log

- **Who can use it:** Admin and HR (whole company); Managers (direct reports only).
- **What it shows:** A summary of feedback for each employee: total count, counts by type, and the date of their last feedback with "days ago". A line at the top shows how many employees, how many feedback notes, and how many people have "gone quiet", meaning more than 60 days since their last feedback (shown in amber).
- **What you can do:**
    - Filter by type: **All**, **Praise**, **Constructive**, **Coaching**, **Recognition**.
    - Download the list with **⬇ Excel**.
- **How to find people who need a check-in:**
    1. Open **Manager Self-Service → Continuous Feedback Log**.
    2. Click a type filter if you like, then look for amber "last received" dates.
    3. Click **⬇ Excel** to download.
- **Good to know:**
    - This report is for viewing only.
    - People who have never received feedback aren't listed here. Check Team Overview for your full team.

Team Comp Plan

- **Who can use it:** Admin, HR and Managers, for their own direct reports.
- **What it shows:** Tiles for Team Size, Total CTC, Avg CTC and Pending Revisions; a **Current Compensation** table (employee, designation, tax regime, annual CTC); and a **Revision History** list of salary revisions with type, previous and revised CTC, effective date and status (Proposed, Approved, Effective, Rejected).

- **What you can do:**
    - **Propose Revision** to nominate a salary change for a team member.
    - **Withdraw** a revision that's still Proposed.
- **How to propose a salary revision:**
    1. Click **+ Propose Revision**.
    2. Choose the **Team Member**. **Previous CTC** fills in from their current CTC. Pick a **Type** (Annual Increment, Promotion, Market Correction, Role Change, Retention), set the **Effective Date**, and enter the **Revised CTC** and a **Reason**.
    3. Click **Submit Nomination**.
- **Good to know:**
    - Your nomination goes into the approval chain and is decided in Pending Approvals. It doesn't change pay by itself. See the chapter *Sign-in options, privacy and approvals*.
    - You type the revised CTC yourself. It isn't calculated for you.
    - If you leave the effective date blank, today's date is used.
    - Once an approver has acted, you can't withdraw it.

Promotion Cases

- **Who can use it:** Admin, HR and Managers, for their own direct reports.
- **What it shows:** Promotion cases for your team, each with current and target designation and grade, revised CTC (if given), effective date, reason and status (Proposed, Approved, Effective, Rejected). Tiles count Cases, Proposed, Effective and Team Size.
- **What you can do:**
    - **Propose Promotion** for a team member.
    - **Withdraw** a case that's still Proposed.
- **How to propose a promotion:**
    1. Click **+ Propose Promotion**.
    2. Choose the **Team Member**. **Current Designation** and **Current Grade** fill in for you. Enter the **Target Designation**, and if you like the **Target Grade**, **Revised CTC**, **Effective Date** and **Reason**.
    3. Click **Submit Nomination**.
- **Good to know:**
    - New cases start as Proposed. They go into the approval chain and are decided in Pending Approvals. See the chapter *Sign-in options, privacy and approvals*.
    - Proposing a promotion doesn't change the employee's designation, grade or pay by itself.
    - Withdrawing removes the proposal.

Flight Risk

- **Who can use it:** Admin, HR and Managers, for their own direct reports.
- **What it shows:** Each direct report with an attrition-risk score (0–100), a level (High, Medium, Low) and the reasons behind it. Tiles count Team Size, High Risk, Medium Risk and Stable. Retention actions logged for a person appear under their card.
- **What you can do:**

    - **Log Action** to record a retention plan for an employee.
    - Change an action's status (Open, In Progress, Done) from its drop-down.
    - **Edit** or **Delete** a logged action. You'll be asked to confirm a delete.
- **How to log a retention action:**
    1. Find the employee and click **Log Action**.
    2. Describe the plan in **Action / Plan**, set **Status** and, if you like, a **Target Date**.
    3. Click **Log Action** to save. Update the status drop-down as the plan progresses.
- **Good to know:**
    - The score is a simple guide. It's based on: serving notice or resigned, being on probation, an active PIP, the latest appraisal potential (underperformer, needs development, high-potential) and a final rating below 3.
    - It doesn't take attendance, pay, surveys or exit intent into account, so use it alongside your own judgement.
    - The risk level saved with an action is a snapshot from when you logged it.

Retention Action Tracker

- **Who can use it:** Admin and HR (whole company); Managers (direct reports only).
- **What it shows:** Every retention action logged from Flight Risk: employee, department, risk level and score (as when logged), the action, owner (manager), target date, status and how long it has been open. Overdue items (still open and past their target date) are listed first, then other open items, then completed ones.
- **What you can do:**
    - Filter by **All**, **Open**, **In progress**, **Done**.
    - Download the list with ⬇ **Excel**.
- **How to follow up on actions:**
    1. Open **Manager Self-Service** → **Retention Action Tracker**.
    2. Review the overdue items at the top and follow up with the manager who owns each one.
    3. Click ⬇ **Excel** to download.
- **Good to know:** This page is for viewing only. To add, edit or change an action, use Flight Risk. There, only the employee's own manager can change it.

Asset Request Queue

- **Who can use it:** Admin and HR (whole company); Managers (direct reports only).
- **What it shows:** Asset requests raised by employees: employee, department, item requested, days since it was raised, who decided it, and status (Open, Approved, Rejected). Open requests come first, oldest at the top. Open requests older than 14 days are shown in red. A summary line counts open, approved and rejected requests.
- **What you can do:**
    - Filter by **All**, **Open**, **Approved**, **Rejected**.
    - Download the list with ⬇ **Excel**.
- **How to review the backlog:**
    1. Open **Manager Self-Service** → **Asset Request Queue**.

2. Click **Open** to see the backlog, and chase anything shown in red.

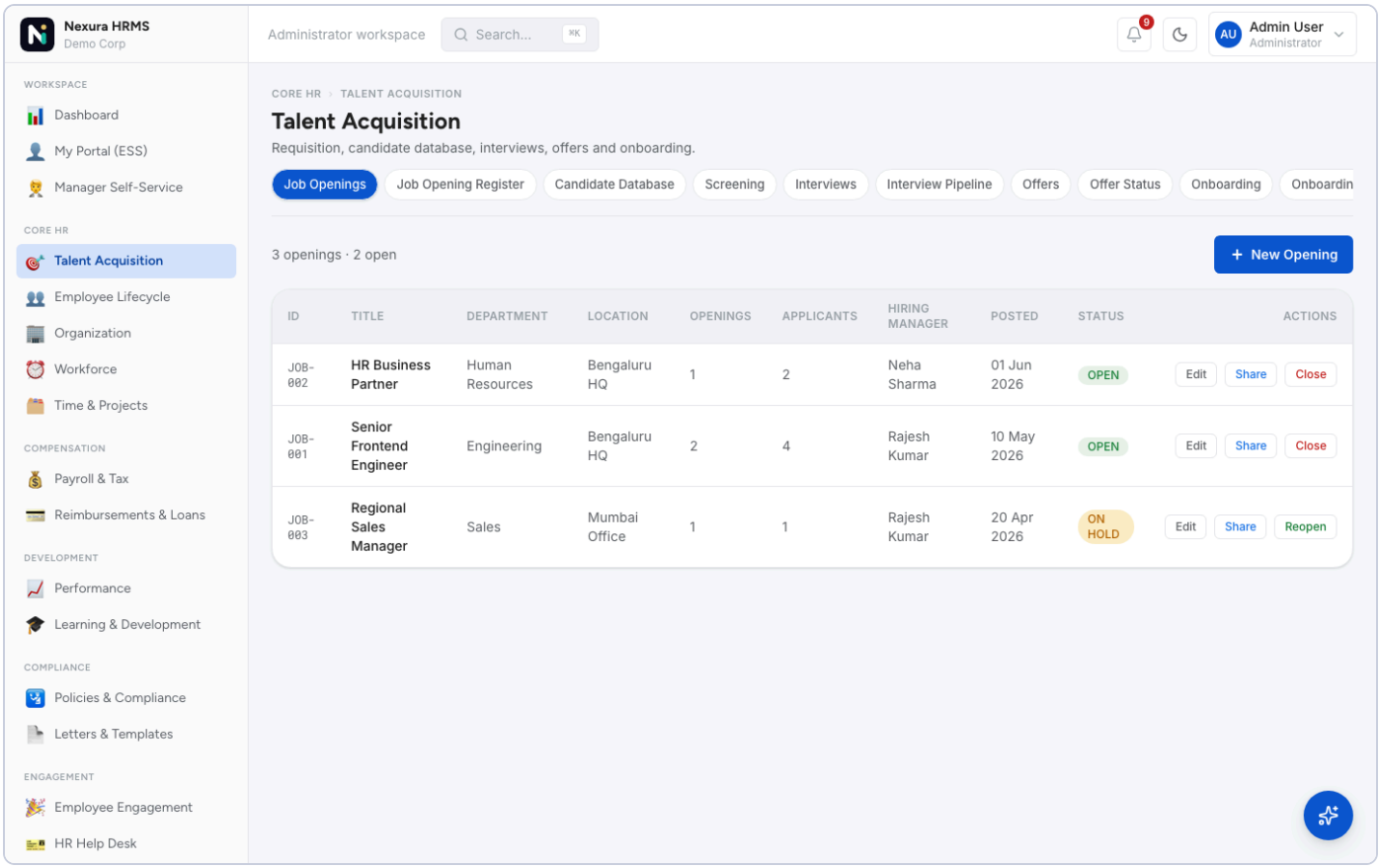
- **Good to know:** This page is for viewing only. Admin and HR approve or reject asset requests in the Assets module.

CORE HR

Talent Acquisition

Manage hiring from start to finish: job openings, candidates, interviews, offers and onboarding of new joiners. Admin and HR can use it.

Job Openings



Job openings

- **Who can use it:** Admin and HR.
- **What it shows:** All your job openings (requisitions), with ID, title, department, location, number of openings, number of applicants, hiring manager, posted date and status (Open, On Hold, Closed, Filled). The header shows the total and how many are open.
- **What you can do:**
    - Create an opening with **New Opening**.
    - **Edit** an opening.
    - **Close** an open opening, or **Reopen** one that isn't open.
    - **Share** an opening on LinkedIn.

- **How to create and share an opening:**
    1. Click **New Opening**.
    2. Enter the **Job Title**, plus **Department**, **Location**, **No. of Openings**, **Hiring Manager**, **Posted On**, **Status** and **Job Description** as needed.
    3. Click **Create Opening**.
    4. To share it, click **Share** on the row, then **Post to LinkedIn**.
- **Good to know:**
    - You type the department, location and hiring manager in yourself. They aren't picked from your company lists, so check the spelling.
    - Posting to LinkedIn works once LinkedIn is connected in the Integration Hub. Until then, the window gives you ready-made post text to copy and paste into LinkedIn yourself.
    - When a LinkedIn post succeeds, the posted date changes to today.
    - **Reopen** appears for any status other than Open (On Hold, Closed, Filled).

Job Opening Register

- **Who can use it:** Admin and HR.
- **What it shows:** A report of all requisitions: title, code, hiring manager, posted date, department and location, number of openings, and how many candidates and offers are linked to each. A summary line shows total requisitions, how many are open, and the total open positions still to fill.
- **What you can do:**
    - Filter by status: **All**, **Open**, **On Hold**, **Closed**, **Filled**.
    - Download the list with ⬇ **Excel**.
- **How to download open requisitions:**
    1. Click a status chip (for example **Open**) to narrow the list.
    2. Click ⬇ **Excel** to download what you're viewing.
- **Good to know:**
    - This page is for viewing only. To add or change openings, use Job Openings.
    - Rows are sorted Open first, then On Hold, Filled and Closed.
    - "Open positions to fill" adds up the number of openings on Open requisitions only.

Candidate Database

- **Who can use it:** Admin and HR.
- **What it shows:** Candidates at the **Shortlisted** stage, with ID, name, the job applied for, experience, current company and expected CTC.
- **What you can do:**
    - Change a candidate's stage from the stage drop-down. The change saves straight away.
    - Create an offer with **Make Offer**.
- **How to make an offer:**
    1. Find the candidate and click **Make Offer**.
    2. Check the **Job Opening** and **Role**. Adjust **Offered CTC** (filled in from the expected CTC) and **Joining Date**.

3. Under **Status**, choose **Draft (save only)** to keep working on it, or **Submit for approval** to send it to approvers.
4. Click **Issue Offer**.

- **Good to know:**
  - This page lists shortlisted candidates only. To add candidates or see every stage, use Screening.
  - Moving a candidate to another stage removes them from this page.
  - An offer is approved before it's released to the candidate. Approvers decide it in Pending Approvals. See the chapter *Sign-in options, privacy and approvals*.

Screening

- **Who can use it:** Admin and HR.
- **What it shows:** Every candidate in your hiring funnel, at any stage, with ID, name and contact details, job applied for, experience, current company, expected CTC and stage.
- **What you can do:**
  - Add a candidate with **Add Candidate**.
  - **Edit** a candidate's details.
  - Change stage from the drop-down: Applied, Screening, Shortlisted, Interview, Offer, Accepted, Rejected, On Hold, Withdrawn.
  - Schedule an interview with **Interview**.
- **How to add a candidate and schedule an interview:**
  1. Click **Add Candidate**. Enter the **Candidate Name** and any other details (Applied For, Stage, Experience, Current Company, Expected CTC, Source, Email, Phone). Click **Add Candidate**.
  2. To schedule an interview, click **Interview** on the row. Fill in **Round**, **When**, **Mode** and **Panel**, then click **Schedule**.
- **Good to know:**
  - You add candidates one at a time. There's no bulk upload or CV attachment here.
  - Experience, CTC and source are typed in as free text.
  - Scheduling an interview moves an Applied, Screening or Shortlisted candidate to the Interview stage for you.

Interviews

- **Who can use it:** Admin and HR.
- **What it shows:** All interviews across the company, with candidate, role, round, date and time, mode, panel and outcome. The header shows total interviews and how many are still scheduled.
- **What you can do:**
  - Schedule an interview for any candidate with **Schedule Interview**.
  - Record the outcome from the drop-down: Scheduled, Recommend, Hold, Reject, Cancelled, Rescheduled.
  - **Delete** an interview.
- **How to schedule an interview and record the outcome:**

1. Click **Schedule Interview**, select the **Candidate**, and fill in **Round**, **When**, **Mode** and **Panel**.
2. Click **Schedule**.
3. After the interview, change the **Outcome** drop-down on that row.

- **Good to know:**
  - **Recommend** moves the candidate to the Offer stage. **Reject** moves them to Rejected.
  - You type panel members' names in. The app doesn't send calendar invites or emails, so invite the panel and candidate yourself.
  - When you delete an interview, you're asked to confirm first.

Interview Pipeline

- **Who can use it:** Admin and HR.
- **What it shows:** One row per candidate: total interview rounds, rounds still pending (Scheduled or Rescheduled), the latest round and its date, and current status (from the most recent round). Candidates awaiting a decision appear first.
- **What you can do:**
  - Filter by latest status: **All**, **Scheduled**, **Recommend**, **Hold**, **Reject**, **Cancelled**, **Rescheduled**.
  - Download the list with ⬇ **Excel**.
- **How to see upcoming rounds:**
  1. Click **Scheduled** to see candidates whose latest round is still to come.
  2. Click ⬇ **Excel** to download the filtered list.
- **Good to know:**
  - This page is for viewing only. Update outcomes on the Interviews page.
  - Only candidates with at least one interview appear.

Offers

- **Who can use it:** Admin and HR.
- **What it shows:** All offers, with offer ID, candidate, role, CTC, issued date, joining date and status. Offers waiting for approval show an **Awaiting approval** label.
- **What you can do:**
  - Create an offer with **New Offer**.
  - **Edit** an offer.
  - Change status from the drop-down.
  - **Delete** an offer.
- **How to create an offer:**
  1. Click **New Offer**.
  2. Select the **Candidate** and enter the **Role**. If you like, pick the **Job Opening** and enter **Offered CTC**, **Issued On** and **Joining Date**.
  3. Under **Status**, choose **Draft** to keep working on it, or **Pending** to submit it for approval. Click **Create Offer**.
  4. When a draft is ready, click **Submit for approval**.

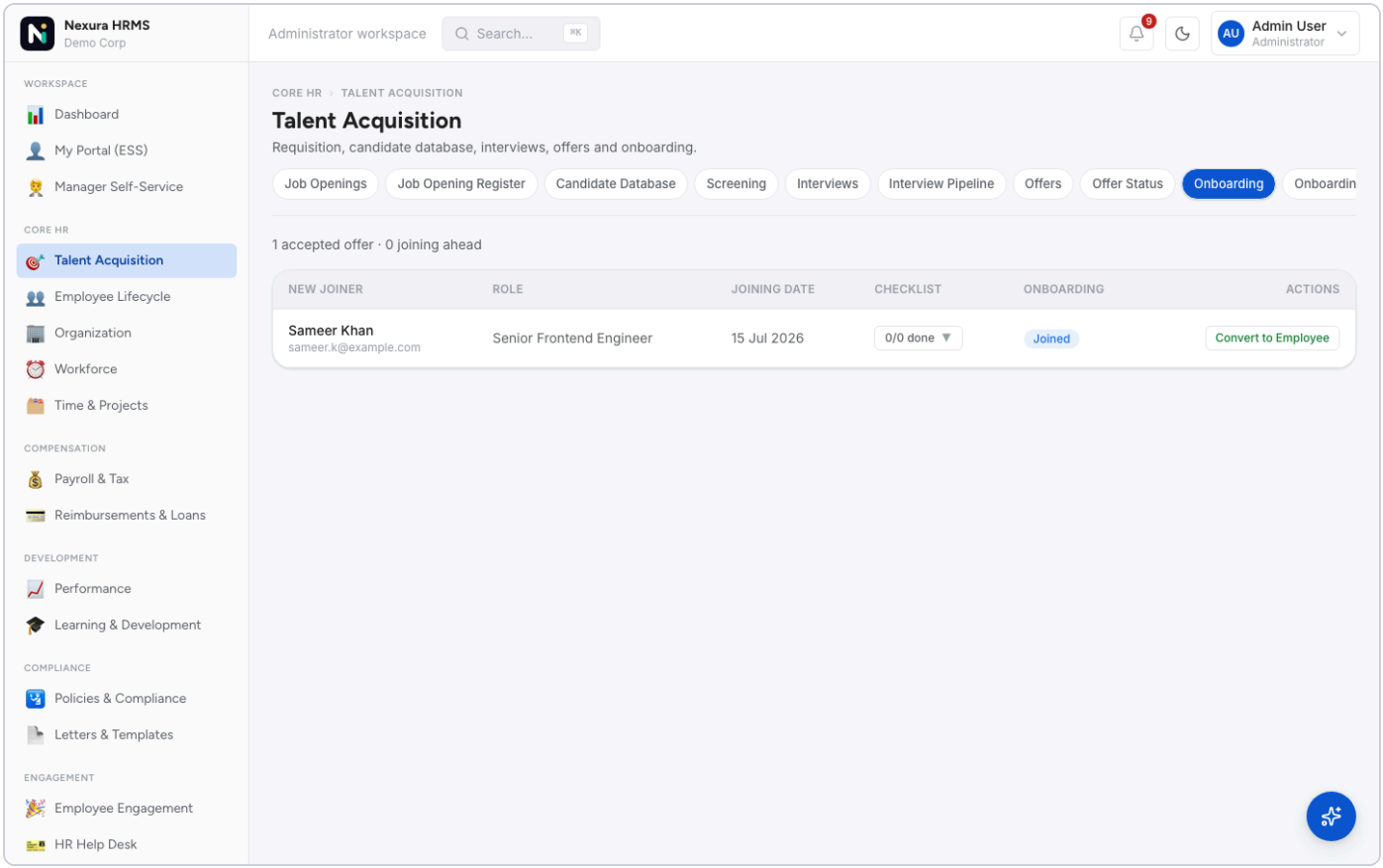
5. After final approval the offer becomes **Pending** (released to the candidate). When the candidate responds, change the status to **Accepted** or **Rejected**.

- **Good to know:**
    - A draft can only be submitted for approval or withdrawn.
    - An offer awaiting approval can't be edited. You can only withdraw it.
    - If you change the candidate, job, role or CTC of a released offer, it goes back for approval.
    - You type the CTC in yourself (for example "24 LPA"). It isn't calculated or linked to a salary structure.
    - No offer letter is created on this page.
    - If you leave **Issued On** blank, today's date is used.
    - **Accepted** moves the candidate to Accepted. **Rejected** or **Withdrawn** moves them to Rejected.
    - Only Accepted offers appear in Onboarding.
    - When you delete an offer, you're asked to confirm first.

Offer Status

- **Who can use it:** Admin and HR.
- **What it shows:** A report of every offer: candidate, role and job opening, CTC, issued date, joining date and status. A summary line shows total, pending (awaiting the candidate's response) and accepted counts. Pending offers are listed first.
- **What you can do:**
    - Filter by status: **All**, **Draft**, **Pending**, **Accepted**, **Declined**, **Withdrawn**, **Expired**.
    - Download the list with ⬇ **Excel**.
- **How to see offers awaiting a response:**
    1. Click **Pending**.
    2. Click ⬇ **Excel** to download.
- **Good to know:**
    - This page is for viewing only. Change offers on the Offers page.
    - "Declined" here means the same as "Rejected" on the Offers page.
    - Offers don't expire on their own. Set **Expired** yourself on the Offers page.

Onboarding



Onboarding

- **Who can use it:** Admin and HR.
- **What it shows:** Your new joiners, meaning every candidate with an Accepted offer: name and contact details, role, joining date, checklist progress (for example "2/5 done") and status: **In progress**, **Joined** (joining date has passed) or **Onboarded** (an employee record exists).
- **What you can do:**
    - Open a joiner's checklist by clicking the "x/y done" button.
    - **Add** checklist tasks with a category, assignee and due date.
    - Tick a task done or not done, or **Remove** it.
    - Create the employee record with **Convert to Employee**.
- **How to onboard a joiner:**
    1. Click the "x/y done" button for the joiner.
    2. Enter the **Task**, plus **Category**, **Assignee** and **Due** as needed, then click **Add**.
    3. When everything's ready, click **Convert to Employee**.
- **Good to know:**
    - There's no standard checklist template. You add tasks for each joiner.
    - **Convert to Employee** creates an active employee with just the name, email, mobile, joining date and the next employee code. Then fill in department, designation, manager and other details in the Directory.
    - A joiner shows as **Onboarded** when an employee with the same name exists.
    - When you remove a task, you're asked to confirm first.

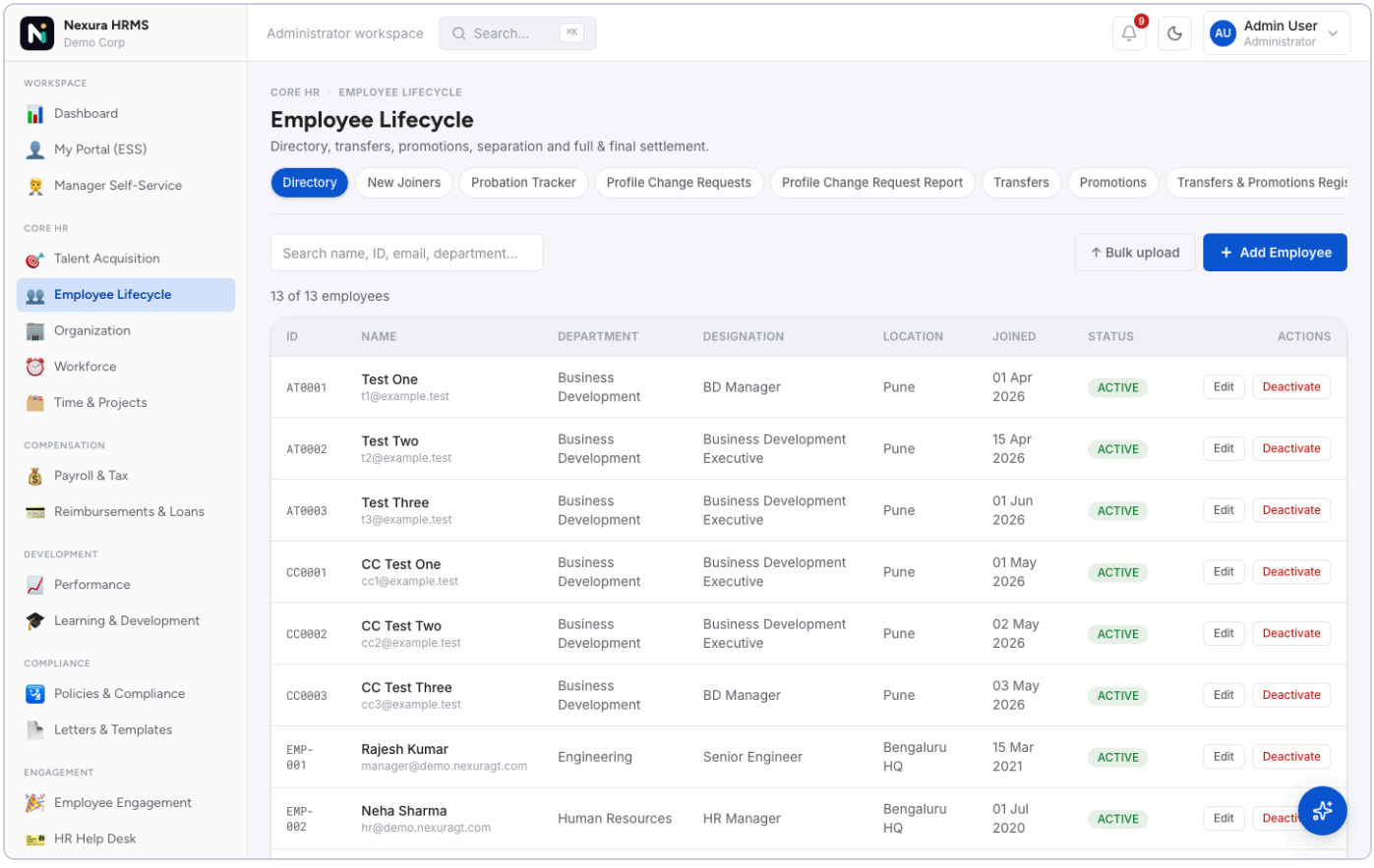
Onboarding Task Tracker

- **Who can use it:** Admin and HR.
- **What it shows:** Progress for each new joiner: tasks done, pending, overdue (not done and past the due date) and a progress bar (% done). Joiners with the least progress are listed first. The summary shows total tasks done and how many joiners have overdue items.
- **What you can do:**
    - Filter: **All joiners** or **Has overdue**.
    - Download the list with ⬇ **Excel**.
- **How to find joiners at risk:**
    1. Click **Has overdue**.
    2. Go to Onboarding to update their checklist.
- **Good to know:**
    - This page is for viewing only.
    - Only joiners with at least one checklist task appear.
    - Tasks without a due date are never counted as overdue.

Employee Lifecycle

Manage an employee from joining to exit: the employee directory, new joiners, probation, profile changes, transfers, promotions, separation and full & final settlement. Admin, HR and Managers can use it. Some pages are for Admin and HR only, as noted below.

Directory



The employee directory

- **Who can use it:** Admin, HR and Managers can open it. Only Admin and HR can add, edit, upload or deactivate employees.
- **What it shows:** Every employee in the company, with ID, name, email, department, designation, location, joining date and status (Active, Probation, Notice, Resigned, Terminated). Managers see the full list, but see annual CTC only for their own direct reports.
- **What you can do:**
    - Search by name, ID, email or department.
    - Add one employee with **+ Add Employee**.
    - Add many employees at once with ↑ **Bulk upload** (an Excel .xlsx file, up to 2,000 rows; .csv also works).
    - Edit an employee.
    - Deactivate an employee (this sets their status to Terminated).
- **How to add employees:**
    1. To add one person, click **+ Add Employee**. Fill in at least **Employee ID** and **Full Name**. You can also add email, mobile, gender, joining date, probation end date, department, designation, location, grade, cost centre, reporting manager, annual CTC, Provident Fund and status. Click **Create Employee**.
    2. To add many, click ↑ **Bulk upload**, then ↓ **Download Excel template**. Fill it in, including each person's monthly salary in the "Salary: …" columns, and upload it. Review the row-by-row check, then click **Import N valid rows**. Salary structures are created from the salary columns.
- **Good to know:**
    - You can't change an Employee ID after it's created, and each one must be unique.
    - An employee's **Email** is how they sign in: they click **Email me a sign-in code** on the sign-in page, and their first sign-in creates their login. Keep each email correct and unique.
    - In a bulk upload, you can tick **Create missing departments, designations, locations, grades and cost centres** so new names are added for you. If you don't tick it, these must already exist (matched by name; cost centres by code or name).
    - In a bulk upload, a reporting manager can be an existing employee or another row in the same file (use their Employee ID). Enter dates as DD/MM/YYYY.
    - Rows with unknown values or duplicate IDs are skipped, and the check shows you why.
    - Bulk upload adds new employees only. It doesn't update existing ones.
    - Leave probation end date blank to use your company's standard probation length.
    - When HR changes an existing employee's reporting manager or department, the change waits for an Admin to approve it in Pending Approvals. See the chapter *Sign-in options, privacy and approvals*.
    - When you deactivate an employee, you're asked to confirm first. Their Employee or Manager login stops working and they're signed out everywhere. To undo it, edit the employee and change their status back.
    - Every change is recorded in the audit log.

New Joiners

- **Who can use it:** Admin, HR and Managers. Managers see only their direct reports.

- **What it shows:** Employees whose joining date falls in the dates you choose, with department, designation, reporting manager and current status, plus a count of how many are still on the rolls.
- **What you can do:**
    - Pick **From** and **To** dates and click **Apply**.
    - Download the report with ⬇ **Excel**.
- **How to list joiners for a period:**
    1. Enter the **From** and **To** dates and click **Apply**.
    2. Click ⬇ **Excel** to download the list.
- **Good to know:**
    - This page is for viewing only.
    - The default range is 1 January of this year to today.
    - People who have since resigned or been terminated are still listed, because the report counts hiring, not current headcount.
    - Employees with no joining date on file are left out.

Probation Tracker

- **Who can use it:** Admin, HR and Managers. Managers see only their direct reports.
- **What it shows:** Everyone on probation, with joining date, months completed, confirmation due date and a status badge: **Overdue**, **Due in N days** (within 30 days), **On track**, or **No joining date**. Overdue cases are listed first.
- **What you can do:**
    - Change **Assumed probation (months)** to try a different probation length (1–24 months).
    - Download the tracker with ⬇ **Excel**.
- **How to see who's due for confirmation:**
    1. Open the page. Overdue and due-soon rows are at the top.
    2. To try a different probation length, enter a number in **Assumed probation (months)** and click **Apply**. Click ⬇ **Excel** if you need a file.
- **Good to know:**
    - This page is for viewing only. To confirm someone, HR edits the employee in the Directory and changes their status (for example to Active), or extends their probation end date.
    - The due date is the employee's probation end date. If none is set, it's the joining date plus your company's probation length.
    - Missing probation end dates are filled in each day, and HR/Admin get one notification when a confirmation is due. Nobody is confirmed automatically.

Profile Change Requests

- **Who can use it:** Admin and HR see and decide all requests. Managers see their direct reports' requests, for viewing only.
- **What it shows:** Requests employees have raised from My Profile to change their own details, with totals for Pending, Approved and Rejected. Each request lists the fields the employee wants to change.
- **What you can do:**

    - Review a request (current and requested values side by side, plus the employee's note).
    - **Approve & Apply** or **Reject**, with an optional decision note (Admin and HR).
    - View requests that have already been decided.
- **How to decide a request:**
    1. Click **Review** on a pending request.
    2. Compare the **Current** and **Requested** columns. If you like, type a **Decision note**. Then click **Approve & Apply** or **Reject**.
- **Good to know:**
    - Approving updates the employee's record straight away.
    - Employees can request changes to: mobile, personal email, marital status, blood group, bank name, account number, branch, IFSC, and emergency contact name, relation, phone and address.
    - The employee is notified of the decision.
    - An employee can have only one pending request at a time.

Profile Change Request Report

- **Who can use it:** Admin and HR see all requests. Managers see only their direct reports'.
- **What it shows:** Profile change requests with employee, department, which fields are changing, who decided, how many days old the request is, and status. Open requests are listed first, oldest on top. Open requests older than 7 days are highlighted in red.
- **What you can do:**
    - Filter by **All**, **Open**, **Approved** or **Rejected**.
    - Download the report with ⬇ **Excel**.
- **How to download the report:**
    1. Click a status filter to narrow the list.
    2. Click ⬇ **Excel** to download what you're viewing.
- **Good to know:**
    - This page is for viewing only. To decide a request, use Profile Change Requests.
    - The report shows which fields are changing, not the old or new values.

Transfers

- **Who can use it:** Admin and HR (all employees). Managers can request or withdraw transfers for their direct reports.
- **What it shows:** All transfers, with employee, type (Inter-Department, Inter-Location, Inter-Grade, Deputation), from → to, effective date, who approved, and status (Requested, Approved, Effective, Rejected, Cancelled).
- **What you can do:**
    - Create a transfer with ＋ **New Transfer**.
    - Edit a transfer.
    - Change status from the status drop-down in the list.
- **How to record a transfer:**

1. Click **+ New Transfer**. Choose the **Employee** and **Type**, fill in **From**, **To**, **Effective Date** and **Reason**, then click **Create Transfer**.
2. To approve or apply it, choose **Approved** or **Effective** in that row's status drop-down (Admin and HR).

- **Good to know:**
  - You type **From** and **To** in yourself. When a department, location or grade transfer becomes Effective, the employee's record is updated for you. So **To** must exactly match a name set up under Organization.
  - When HR sets an Inter-Department transfer to Effective, it's saved as Approved and waits for an Admin to approve it in Pending Approvals. Once the Admin approves, it becomes Effective and the employee's department changes.
  - Deputations are recorded for reference and don't change the employee's record.
  - Nobody can approve their own transfer.
  - Managers can set only Requested or Cancelled.
  - If a status change isn't allowed (for example, **To** doesn't match a name under Organization, or the approval chain isn't finished), the reason appears under the status drop-down and the status goes back to what it was.

Promotions

- **Who can use it:** Admin and HR (all employees). Managers can propose or withdraw promotions for their direct reports.
- **What it shows:** Promotions with employee, designation and grade change, revised CTC, effective date and status (Proposed, Approved, Effective, Rejected), plus a count of proposals.
- **What you can do:**
  - **+ Propose Promotion**.
  - Edit a promotion.
  - Change status from the status drop-down.
- **How to record a promotion:**
  1. Click **+ Propose Promotion**, select the **Employee**, and fill in From/To Designation, From/To Grade, **Revised CTC (₹/yr)**, **Effective Date** and **Reason / Justification**. Click **Propose**.
  2. The promotion goes through its approval chain (by default, any HR or Admin user) and is approved in Pending Approvals.
  3. After final approval, set its status to **Effective** when it takes effect.
- **Good to know:**
  - You type all values in yourself. Nothing is calculated.
  - When a promotion becomes Effective, the employee's designation, grade and annual CTC are updated for you. The new designation and grade must match names under Organization.
  - Nobody can approve their own promotion.
  - Managers can only propose or withdraw (Rejected).
  - If a status change isn't allowed (for example, a name doesn't match, or the approval chain isn't finished), the reason appears under the status drop-down and the status goes back to what it was.
  - For more on approvals, see the chapter *Sign-in options, privacy and approvals*.

Transfers & Promotions Register

- **Who can use it:** Admin and HR see all. Managers see only their direct reports.
- **What it shows:** One combined list of transfers and promotions, with employee, department, movement type, from → to, effective date and status, newest effective date first, plus counts of each type.
- **What you can do:**
    - Filter by **All**, **Transfers** or **Promotions**.
    - Download the list with ⬇ **Excel**.
- **How to download movements:**
    1. Click **All**, **Transfers** or **Promotions**.
    2. Click ⬇ **Excel** to download what you're viewing.
- **Good to know:**
    - This page is for viewing only. Make changes on the Transfers or Promotions pages.
    - Records with no effective date appear at the bottom.

Separation

- **Who can use it:** Admin and HR.
- **What it shows:** One card per exit, showing employee, resignation date, last working day, reason, overall status (In Notice, Cleared, Pending F&F, Closed, Absconded) and four clearances: IT, Finance, Admin and Manager.
- **What you can do:**
    - Start an exit with ＋ **Initiate Separation**.
    - Edit a separation.
    - Change the overall status.
    - Set each clearance to Pending, In Progress or Done.
- **How to manage an exit:**
    1. Click ＋ **Initiate Separation**. Choose the **Employee**, enter **Resigned On**, **Last Working Day**, **Status** and **Reason**, then click **Initiate**.
    2. As each department signs off, change its clearance drop-down (IT, Finance, Admin, Manager) to **Done**.
- **Good to know:**
    - Starting a separation sets the employee's status to Notice.
    - **Closed** sets them to Resigned. **Absconded** sets them to Terminated.
    - When all four clearances are Done, an In Notice case moves to Cleared for you.
    - Each day, employees on notice whose last working day has passed are marked Resigned.
    - HR records each clearance here on behalf of the department.

Exit / Clearance Tracker

- **Who can use it:** Admin and HR.
- **What it shows:** Separations with last working day, reason, status and the four clearance statuses (IT, Finance, Admin, Manager), plus counts of exits in progress and exits with clearances still pending.

- **What you can do:**
    - Switch between **In progress** (the default, which hides Closed) and **All**.
    - Download the list with ⬇ **Excel**.
- **How to check outstanding clearances:**
    1. Open the page to see open exits and which clearances are outstanding.
    2. Click **All** to include closed exits, and ⬇ **Excel** to download.
- **Good to know:** This page is for viewing only. Update clearances on the Separation page.

Full & Final Settlement

- **Who can use it:** Admin and HR.
- **What it shows:** One card per settlement, with earnings (pending salary, leave encashment, gratuity, bonus/variable, other), deductions (notice recovery, loan outstanding, asset recovery, TDS on F&F, other), net payable and status (Draft, Approved, Paid, On Hold).
- **What you can do:**
    - Start a settlement with ＋ **New Settlement**.
    - Fill in suggested figures with ⚡ **Prefill from records**.
    - Edit a settlement.
    - Change its status.
    - Download the settlement statement (PDF).
- **How to settle an exit:**
    1. Click ＋ **New Settlement** and select the **Employee**. Click ⚡ **Prefill from records**, review the suggested amounts and notes, and enter the remaining amounts. Set **Status**, then click **Create**.
    2. When it's paid, set the status to **Paid**, then click ⬇ **Statement** to download the PDF.
- **Good to know:**
    - Prefill gives estimates only:
        - Pending salary: exit-month pay up to the last working day, before any LOP or TDS.
        - Leave encashment: unused paid leave × (Basic + DA) ÷ 26.
        - Loan recovery: the outstanding loan balance.
        - Gratuity: the statutory formula. It's zero for under 5 years' service, unless the separation reason mentions death or disablement.
    - Notice recovery, bonus, TDS, asset recovery and other amounts aren't filled in. Enter them yourself.
    - You can overwrite every figure.
    - Net payable is total earnings minus total deductions, worked out for you.
    - Setting the status to **Paid** records today as the paid date.

F&F Settlement Report

- **Who can use it:** Admin and HR.
- **What it shows:** Full & final settlements with last working day, total earnings, total deductions, net payable and status.

- **What you can do:**
    - Switch between **Unsettled** (the default, which hides Paid) and **All**.
    - Download the list with ⬇ **Excel**.
- **How to see unpaid settlements:**
    1. Open the page to see settlements not yet paid.
    2. Click **All** to include paid ones, and ⬇ **Excel** to download.
- **Good to know:**
    - This page is for viewing only.
    - Amounts are the values saved on the Full & Final Settlement page. Earnings and deductions totals are shown so you can check the net payable.

Organization

View and maintain your company's structure: departments, locations, grades, reporting lines, designations and cost centres. Admin and HR can use it.

Hierarchy

- **Who can use it:** Admin and HR.
- **What it shows:** Three panels (Departments, Locations and Grades), each listing every item with the number of employees in it. The header shows active headcount (everyone not terminated) and the number of departments.
- **What you can do:** This page is for viewing only.
- **How to check headcount by group:**
    1. Open the page to see headcount by department, location and grade.
    2. To add or rename departments, locations or grades, an Admin uses Master Data in System Administration.
- **Good to know:**
    - This is a headcount summary, not an org chart. For who reports to whom, use Reporting Lines.
    - Panel counts include everyone linked to each item, so they may include people who are no longer active.

Reporting Lines

- **Who can use it:** Admin and HR.
- **What it shows:** An indented tree of everyone who isn't terminated, built from each person's manager. Each entry shows name, designation, employee code and how many direct reports they have.
- **What you can do:** This page is for viewing only.
- **How to read the tree:**
    1. Open the page. People with no manager appear at the top level, with their teams nested underneath.
    2. To change who someone reports to, edit their manager in the Directory.
- **Good to know:**

    - Anyone whose manager is missing or terminated appears at the top level. So if you see several "top" entries, some manager details probably need filling in.
    - There's no search or collapse, so large organisations give a long page.

Cost Centres

- **Who can use it:** Admin and HR.
- **What it shows:** Summary cards (number of cost centres, how many are active, and the total annual budget of active centres) and a table with code, name and description, headcount, a budget-vs-spend bar, and status.
- **What you can do:**
    - Add a cost centre with **＋ New Cost Centre**.
    - **Edit** or **Delete** a cost centre (the buttons appear when you hover over a row).
    - Mark a centre Active or Inactive.
- **How to add a cost centre:**
    1. Click **＋ New Cost Centre**.
    2. Enter the **Code** and **Name**, and if you like the **Annual Budget (₹)**, **Description** and **Status**.
    3. Click **Add**.
- **Good to know:**
    - "Spend" counts only reimbursed expense claims tagged to the centre. Salaries aren't included.
    - The bar turns amber at 80% and red above 100%.
    - Codes and names must be unique.
    - When you delete a cost centre, you're asked to confirm first. If you might need it again, mark it Inactive instead.

Cost Centre Register

- **Who can use it:** Admin and HR.
- **What it shows:** A list of cost centres with code, name and description, annual budget, headcount and status. The summary shows the total, how many are active, and the total annual budget.
- **What you can do:**
    - Filter: **All**, **Active**, **Inactive**.
    - Download the list with **⬇ Excel**.
- **How to download the register:**
    1. Pick a filter chip.
    2. Click **⬇ Excel** to download.
- **Good to know:**
    - This page is for viewing only. Make changes on Cost Centres.
    - Unlike the Cost Centres page, the total budget here includes inactive centres, and spend isn't shown.

Location Directory

- **Who can use it:** Admin and HR.
- **What it shows:** Your office and site locations, with name, city, state, headcount, number of geo-fences, and status. The summary shows total locations, how many are active, and how many employees are mapped.
- **What you can do:**
    - Filter: **All**, **Active**, **Inactive**.
    - Download the list with ⬇ **Excel**.
- **How to download the directory:**
    1. Pick a filter chip to narrow the list.
    2. Click ⬇ **Excel** to download.
- **Good to know:**
    - This page is for viewing only. Locations are added or edited in Master Data (System Administration).
    - Geo-fences are managed under Workforce → Geo-Fences.

Grade Band Register

- **Who can use it:** Admin and HR.
- **What it shows:** Your pay grades, with name, rank order, number of employees in each, and status. The summary shows total bands, how many are active, and how many employees are placed.
- **What you can do:**
    - Filter: **All**, **Active**, **Inactive**.
    - Download the list with ⬇ **Excel**.
- **How to download the register:**
    1. Pick a filter chip.
    2. Click ⬇ **Excel** to download.
- **Good to know:**
    - This page is for viewing only. Grades are maintained in Master Data (System Administration).
    - The page shows grade names and ranks only. It doesn't hold salary ranges.

Designation Directory

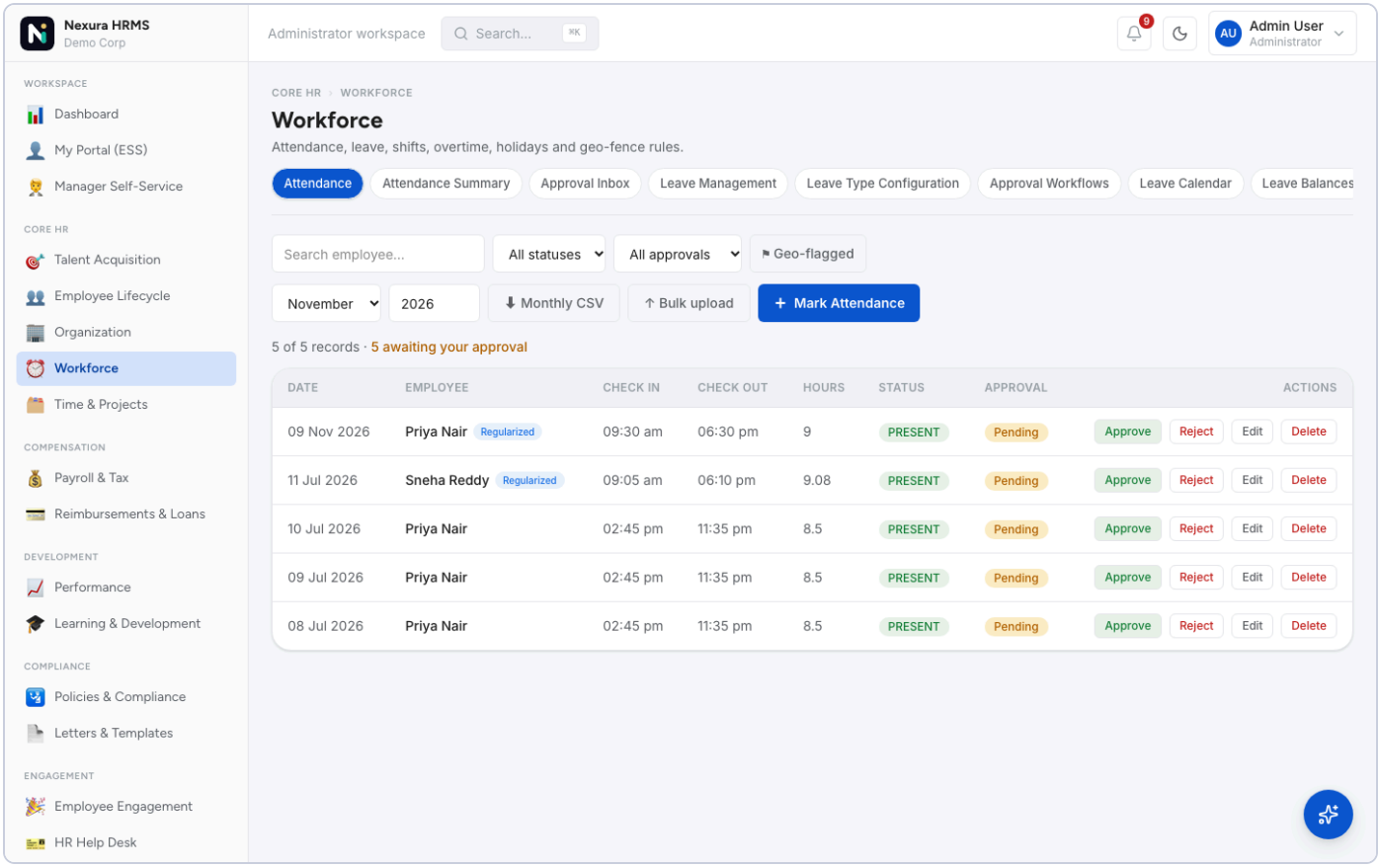
- **Who can use it:** Admin and HR.
- **What it shows:** Your job titles (designations), with the number of employees holding each one, and status. The summary shows total designations, how many are active, and how many employees are placed.
- **What you can do:**
    - Filter: **All**, **Active**, **Inactive**.
    - Download the list with ⬇ **Excel**.
- **How to download the directory:**
    1. Pick a filter chip.
    2. Click ⬇ **Excel** to download.

- **Good to know:** This page is for viewing only. Designations are added or renamed in Master Data (System Administration).

Workforce

Day-to-day time management: attendance, leave, shifts, overtime, holidays and location (geo-fence) rules. Admin, HR and Managers can use it. Some pages are for Admin and HR only, as noted.

Attendance



Attendance

- **Who can use it:** Admin, HR and Managers. Managers see and manage only their direct reports.
- **What it shows:** The latest 150 attendance records (date, employee, check-in and check-out, hours, status and approval stage). Small tags show if a punch was outside a geo-fence, has a selfie, or came from a biometric device, face recognition or WhatsApp, along with the face-match score.
- **What you can do:**
    - Search by employee. Filter by status, approval stage, or **Geo-flagged** only.
    - **Mark Attendance** for one record, and **Edit** or **Delete** records.
    - Upload many records at once (an Excel .xlsx file, from a template you can download; .csv also works).
    - **Approve** (manager stage), **Approve (HR)** (final stage), or **Reject** with an optional reason.
    - Download a **Monthly Excel** summary for a month and year you choose.
- **How to mark and approve attendance:**

1. Click **Mark Attendance**. Pick the employee, date and status. If you like, enter **Check In** / **Check Out** times and a note. Click **Mark**.
2. To approve, click **N awaiting your approval** to filter your queue. Then click **Approve** (managers) or **Approve (HR)** (HR) on each row.

- **Good to know:**
  - Approval has two stages: the manager approves first, then HR. Admin can do both stages. HR can't give the first-stage approval.
  - Editing a record sends it back for approval.
  - Rejected records are left out of payroll.
  - Hours are worked out from check-in and check-out.
  - There's one record per employee per date. Uploading the same date again in a file updates that record.
  - When you delete a record, you're asked to confirm first. This can't be undone.
  - The **Monthly Excel** counts approved records only.

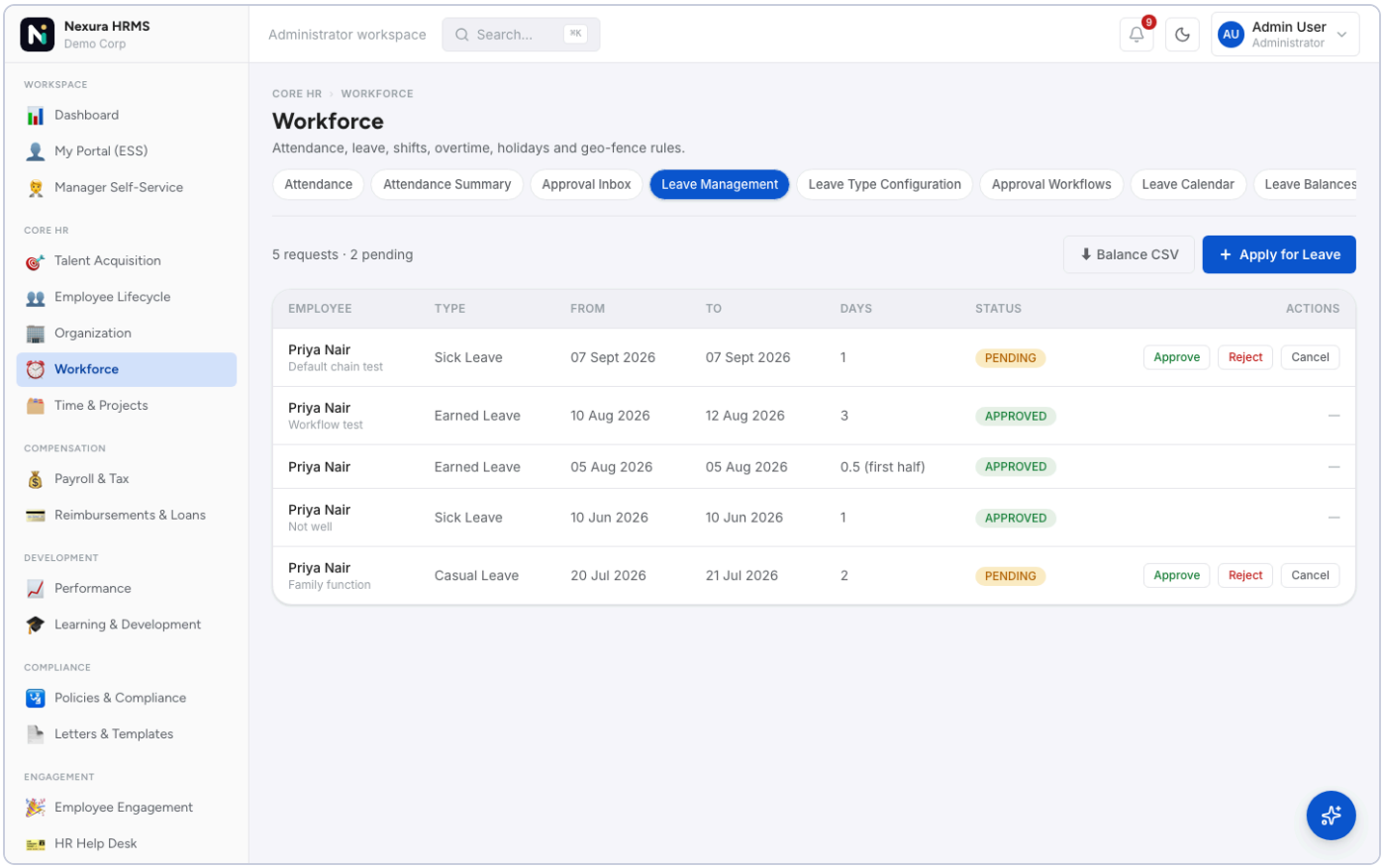
Attendance Summary

- **Who can use it:** Admin, HR and Managers. Managers see only their direct reports.
- **What it shows:** A report for each employee over the dates you choose (by default, this month to date): Present, Half-day, Leave and Absent days, working days, and an attendance percentage with a colour bar. A totals row and an organisation-wide percentage are shown too.
- **What you can do:**
  - Choose **From** and **To** dates and click **Apply**.
  - Download the report with ⬇ **Excel**.
- **How to run the summary:**
  1. Set the **From** and **To** dates.
  2. Click **Apply**, then ⬇ **Excel** if you need a file.
- **Good to know:**
  - This page is for viewing only.
  - It includes all logged attendance, whether or not it's been approved yet.
  - Holidays and weekends aren't counted as working days.
  - Attendance % = (present days + half of half-days) ÷ working days.
  - Late arrivals aren't reported.
  - Only active, probation and notice-period employees are listed.

Approval Inbox

- **Who can use it:** Admin, HR and Managers. This is the same page as **Pending Approvals** under Manager Self-Service. See that section for full details.
- **What it shows:** Every request waiting for your decision: leave, expense claims, overtime, comp-off, attendance regularisation, salary revisions, promotions, job offers, and reporting manager or department changes.
- **What you can do: Approve** or **Reject** each request.
- **Good to know:** This page is the same as Manager Self-Service → Pending Approvals.

Leave Management



Leave management

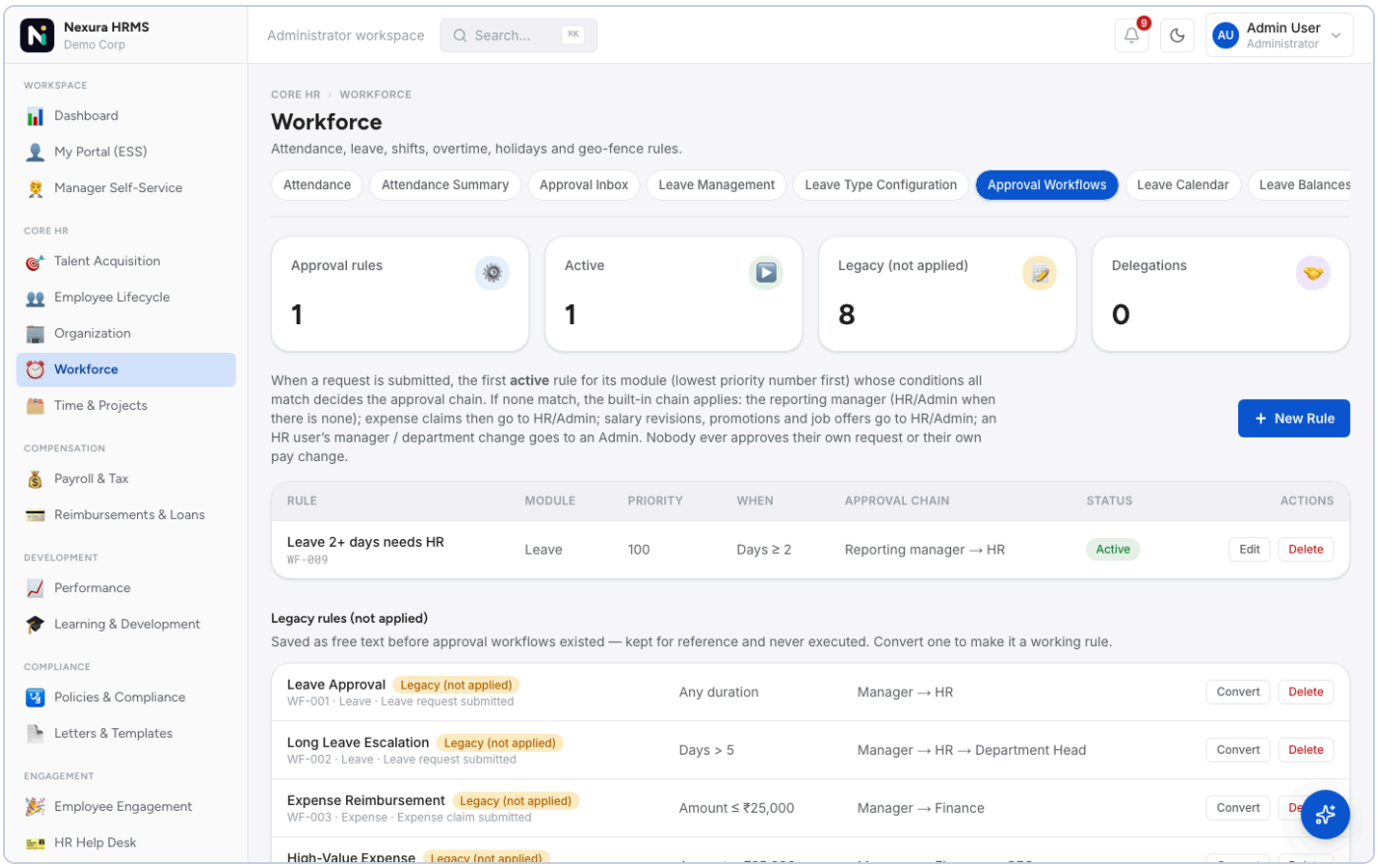
- **Who can use it:** Admin, HR and Managers. Admin and HR see all requests. Managers see their own plus their direct reports'.
- **What it shows:** Leave requests with employee, type, dates, number of days, reason and status (Pending, Approved, Rejected, Cancelled), plus a count of pending requests.
- **What you can do:**
    - **Apply for Leave** for yourself, or for an employee you manage.
    - **Approve** or **Reject** pending requests.
    - Cancel a pending request.
    - Download ⬇ **Balance Excel**, the leave balances of all employees for the current year.
- **How to apply for and decide leave:**
    1. Click **Apply for Leave**. Choose the **Employee** (or leave it as **Myself**), the **Leave Type**, **From** and **To** dates, and **Duration** (full days, or first or second half for a single date). Add a reason, then click **Submit Request**.
    2. On a pending row, click **Approve** or **Reject**.
- **Good to know:**
    - Nobody can approve their own leave.
    - A request can't overlap other leave that's pending or approved.
    - Days are counted using the leave type's rules, which decide whether weekly offs and holidays count.

    - The balance check stops a request only if the leave type is set to **Block applying beyond the balance**.
    - If the approval rule has several steps, your approval may pass the request to the next approver rather than finalise it.
    - Approved and rejected requests can't be changed here.

Leave Type Configuration

- **Who can use it:** Admin and HR.
- **What it shows:** Each leave type with its code, name, days per year, paid or unpaid, how it's credited, carry-forward limit, whether a negative balance is allowed, and whether it's active. It also shows whether your leave year is the calendar year (Jan–Dec) or the financial year (Apr–Mar).
- **What you can do:**
    - Filter **All** / **Active** / **Inactive**.
    - Edit a leave type's balance rules with **Policy**.
    - Change your company's **Leave year** (calendar or financial) and **Save**.
    - Download the list with ⬇ **Excel**.
- **How to set a leave type's rules:**
    1. Click **Policy** on a leave type. Set **Accrual** (Up front or Monthly), **Round to half days**, **Pro-rate joiners**, **Carry forward up to (days)**, **Maximum accumulation (days)**, and the options **Encash lapsed days**, **Block applying beyond the balance** and **Don't count weekly offs and holidays**. Click **Save policy**.
    2. To change the leave year, pick it in the **Leave year** box and click **Save**.
- **Good to know:**
    - Name, days per year and paid/unpaid are set under Admin › Dropdowns, not here.
    - **Encash lapsed days** marks those days on the balance report. Nothing is paid automatically, so add any encashment to payroll yourself.
    - Changing the leave year regroups all balances, carry-forward and encashment into the new year boundaries.

Approval Workflows



Approval workflows

- **Who can use it:** Admin and HR.
- **What it shows:** Approval rules for Leave, Expense, Regularization, Overtime and Comp-off, plus Salary revision, Promotion, Job offer and Org change (these four are managed by Admin only). It shows counts of rules, active rules, legacy rules and current delegations, and lists department heads and active approval delegations.
- **What you can do:**
    - **New Rule**, **Edit**, **Delete**, and switch a rule between Active and Paused.
    - Set conditions (for example leave days, leave type, paid or unpaid, expense category, department, location, grade, employee status) and up to 6 approval steps in order, each with an optional SLA and escalation person.
    - **Convert** or **Delete** older rules marked **Legacy (not applied)**.
    - **Run test** to see who would approve a sample request. Nothing is saved.
    - **Delegate approvals** from one person to another for a date range, or **End** a delegation.
    - Choose each department's head.
- **How to set up a rule and a delegation:**
    1. Click **New Rule**. Enter a **Rule name**, **Module** and **Priority**, set conditions, and add steps (Approver: Reporting manager, Skip-level manager, Department head, Role or Specific user). Click **Create rule**.
    2. Under **Approval delegations**, pick **Person away**, **Approves on their behalf**, **From** and **To**, then click **Delegate approvals**.
- **Good to know:**

    - The first active rule (lowest priority number) whose conditions all match decides the approval chain.
    - If no rule matches, the reporting manager approves (or HR/Admin, if there's no manager). Expense claims then go on to HR/Admin. Salary revisions, promotions and job offers go to HR/Admin, and an HR user's manager or department change goes to an Admin.
    - A step with no valid approver is skipped.
    - Deleting a rule doesn't change requests already submitted. You'll be asked to confirm the delete.
    - Legacy rules are kept for reference only and are never applied.
    - Everyone can delegate their own approvals from My Profile. Only an Admin can set up or end a delegation for someone else.
    - For more, see the chapter *Sign-in options, privacy and approvals*.

Leave Calendar

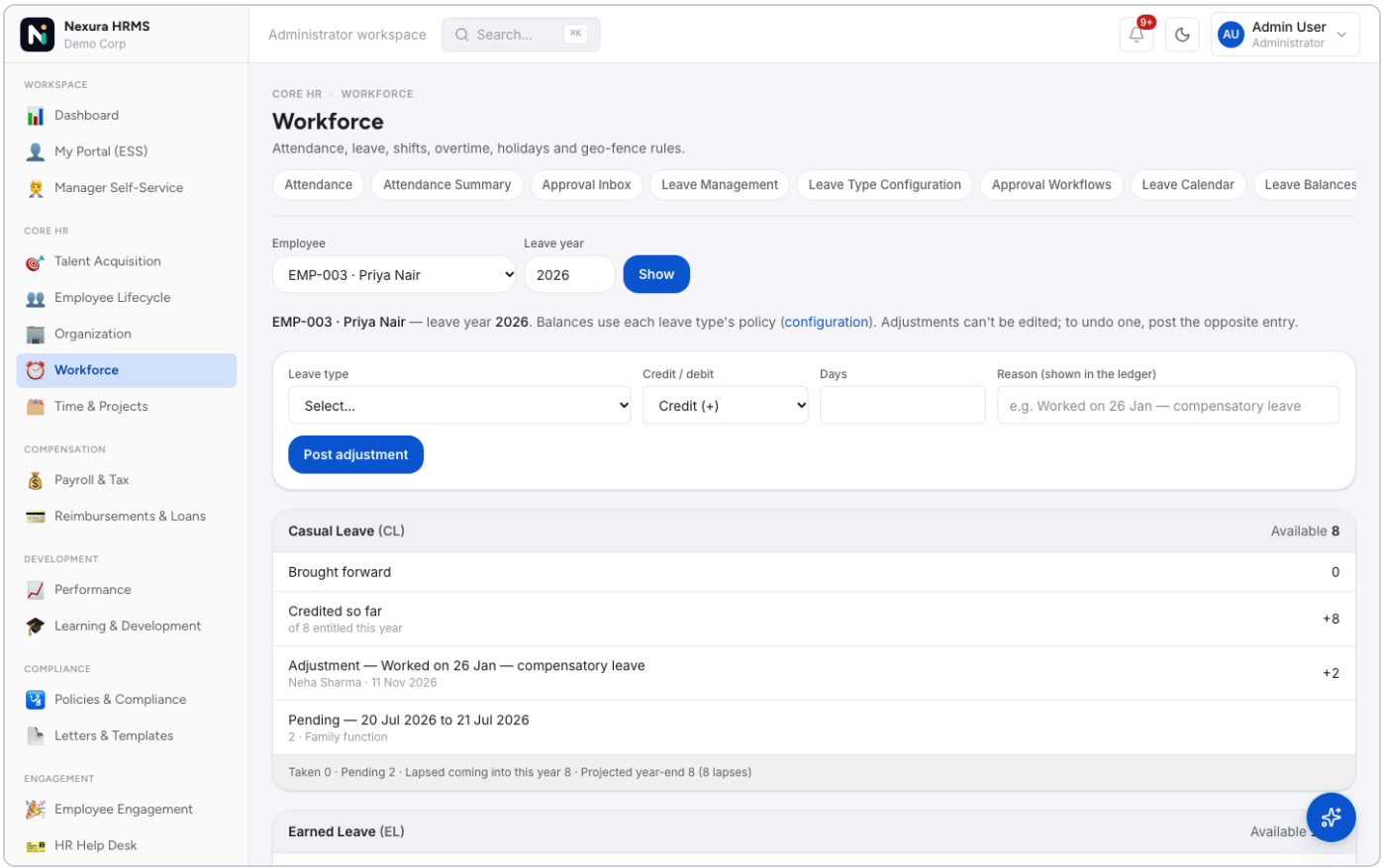
- **Who can use it:** Admin, HR and Managers. Managers see only their direct reports.
- **What it shows:** A month grid with one row per active employee, marking each day they're on **approved** leave. Hover over a marked day to see the leave type and reason. Totals show how many employees are on leave and the total leave days in the month.
- **What you can do:**
    - Move to the previous or next month with the arrows.
    - Choose **Month**, **Year** and **Department**, then click **Apply**.
- **How to spot overlapping leave:**
    1. Select the month, year and, if you like, a department.
    2. Click **Apply** to see who's off.
- **Good to know:**
    - This page is for viewing only.
    - Pending and rejected leave isn't shown.
    - Saturday and Sunday are shaded as weekends, whatever each employee's actual shift or week-off.
    - There's no download on this page. For a file, use Leave Taken.

Leave Balances

- **Who can use it:** Admin and HR.
- **What it shows:** For the leave year you choose, every active employee's available balance against their entitlement for each active leave type, any brought-forward days, and a total. Used-up balances are shown in red. Hover over a cell to see entitled, credited so far, opening/carried forward, used, pending and lapsed days.
- **What you can do:**
    - Pick a **Leave year** and click **Apply**.
    - **+ Opening balance** to set one employee's starting balance.
    - **⬆ Import** opening balances (an Excel .xlsx file, from a template; .csv also works).
    - View the opening balances already set for the year.
    - Download the full statement with **⬇ Excel**.

- **How to set opening balances:**
    1. Click **+ Opening balance**. Choose the **Employee**, **Leave type** and **Leave year**, enter **Days** (in half-day steps) and an optional note, then click **Save**.
    2. For many employees, click **⬆ Import**, download the template, fill it in and upload it.
- **Good to know:**
    - Available balance = brought forward + credited so far + any HR adjustments − used − pending.
    - An opening balance replaces the worked-out carry-forward for that year. This is useful when you move from another system.
    - Leaving **Days** blank removes the opening balance.
    - Importing a row again overwrites it.
    - Days can be negative.

Leave Ledger



A leave ledger for one employee

- **Who can use it:** Admin and HR.
- **What it shows:** One employee's leave statement for the leave year you choose, a block for each leave type they have anything in. Each block lists what was brought forward, what has been credited so far, every adjustment HR has posted (with the reason, who posted it and when), and each approved or pending leave request. The footer gives taken, pending, lapsed and projected year-end days, and the **Available** figure matches the one on Leave Balances.
- **What you can do:**
    - Choose an **Employee** and **Leave year**, then click **Show**.

    - **Post adjustment** to credit or debit days: for example compensatory leave for working on a holiday, or a correction.

- **How to post an adjustment:**
    1. Choose the employee and click **Show**.
    2. Pick the **Leave type**, choose **Credit (+)** or **Debit (−)**, enter the **Days** (half-day steps) and a **Reason**.
    3. Click **Post adjustment** and confirm.
- **Good to know:**
    - A reason is required, and it appears in the ledger.
    - Adjustments can't be edited or deleted. To undo one, post the opposite entry.
    - An adjustment is added on top of the leave type's maximum-accumulation limit, so it isn't trimmed by it. It counts in the year-end balance and carries forward like any other unused day.
    - Every adjustment is also recorded in the audit log.
    - A leave request that runs across two leave years is shown in both, with only the days falling in each year counted.

Leave Taken

- **Who can use it:** Admin, HR and Managers. Managers see only their direct reports.
- **What it shows:** For one leave year, how many days of each leave type each employee has taken, their number of requests, LOP (unpaid leave) days and total days, with column totals.
- **What you can do:**
    - Enter a **Leave year** and click **Apply**.
    - Download the report with ⬇ **Excel**.
- **How to run the report:**
    1. Type the leave year (for a financial year, the year it starts in) and click **Apply**.
    2. Click ⬇ **Excel** to download.
- **Good to know:**
    - This page is for viewing only.
    - Only **approved** leave counts.
    - Each request is counted in the year its start date falls in, so leave that spans two years is counted in the first.
    - LOP days are days taken on leave types marked unpaid.
    - Only active leave types, and active, probation and notice-period employees, are shown.

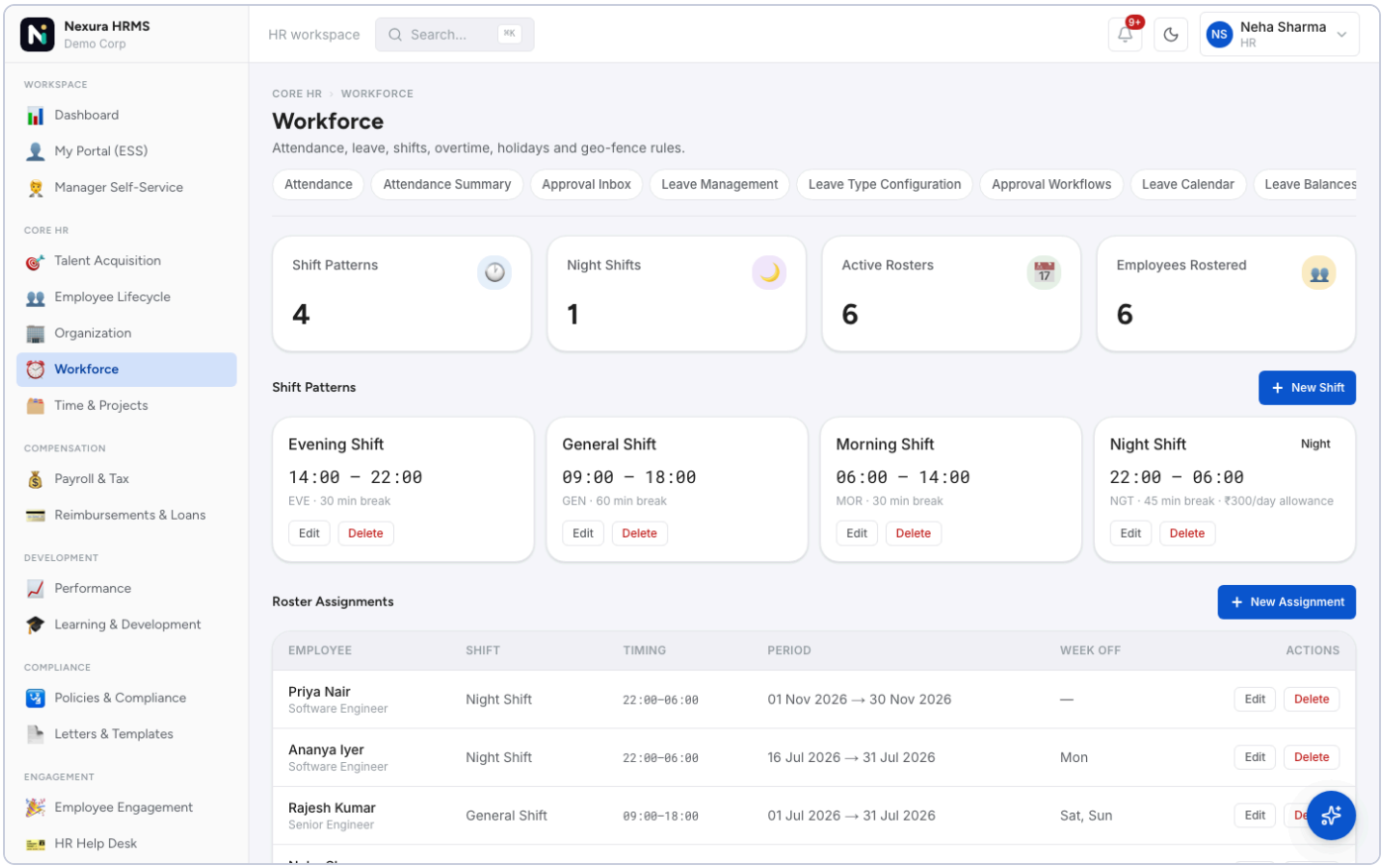
Leave Approvals

- **Who can use it:** Admin, HR and Managers. Admin and HR see every pending request. Managers see only their direct reports'.
- **What it shows:** All pending leave requests with employee, department, type, dates, days, the balance left for that leave type after pending requests (red if below zero) and the reason.
- **What you can do: Approve** or **Reject** each request.
- **How to decide leave requests:**

1. Review the **Balance** and **Reason** columns.
2. Click **Approve** or **Reject** on the row.

- **Good to know:**
  - Your own requests never appear here. Someone else approves them.
  - There's no comment box on this page. To add a note, use Pending Approvals.
  - If the approval rule has several steps, approving may move the request to the next approver rather than finalise it.

Shifts & Roster



Shifts and roster

- **Who can use it:** Admin, HR and Managers. Only Admin and HR can create, edit or delete shift patterns. Managers see and roster only their direct reports.
- **What it shows:** Counts of shift patterns, night shifts, roster assignments and rostered employees; a card for each shift pattern; and a table of roster assignments (employee, shift, timing, period, week off).
- **What you can do:**
  - **New Shift**, **Edit**, **Delete** (shift patterns, Admin and HR).
  - **New Assignment**, **Edit**, **Delete** (roster assignments).
- **How to set up a shift and roster someone:**
  1. Click **New Shift**. Enter **Code**, **Name**, **Start Time**, **End Time**, **Break** (minutes), **Night Shift?**, **Shift allowance (₹ per day worked)** (leave it at 0 for none) and **Active?**, then click **Create Shift**.

2. Click **New Assignment**. Pick the **Employee** and **Shift**, set **From Date** and **To Date**, type the **Week Off** (for example "Sat, Sun"), then click **Create Assignment**.

- **Good to know:**
    - You type the week off as text, so keep the format consistent.
    - You'll be asked to confirm before a shift or assignment is deleted.
    - **Shift allowance:** when a shift has an allowance, payroll adds a separate **Shift Allowance** line to the payslip of each employee rostered on it: the number of days they were present, with a half day counting as half, times the daily amount. Only days whose attendance has been approved are counted, and loss of pay doesn't reduce it. It is not part of the PF wage, counts towards ESI and Professional Tax, and is taxed in the month it is paid. Re-processing a run recalculates it, so it is never paid twice.

Shift Master

- **Who can use it:** Admin and HR.
- **What it shows:** All your shift definitions: code, name, start and end time, break minutes, night shift or not, and status, with counts of total, active and night shifts.
- **What you can do:**
    - Filter **All** / **Active** / **Inactive**.
    - Download the list with ⬇ **Excel**.
- **How to download the shift list:**
    1. Choose a filter chip.
    2. Click ⬇ **Excel** to download.
- **Good to know:** This page is for viewing only. To add or change shifts, use **Shifts & Roster**.

Shift Roster Coverage

- **Who can use it:** Admin, HR and Managers. Managers see only their direct reports. Admin and HR see everyone.
- **What it shows:** Every shift assignment: the employee and department, their shift, the dates it covers, their week-off pattern, and whether it's **Active** (today falls inside the dates), **Upcoming** or **Expired**. Active assignments are listed first. A summary line counts total, active and upcoming assignments.
- **What you can do:**
    - Filter by shift using the chips at the top (**All** or a shift name).
    - Download the list with ⬇ **Excel**.
- **How to check coverage for a shift:**
    1. Open Shift Roster Coverage.
    2. Click a shift name to see only that shift, or **All** for everyone.
    3. Click ⬇ **Excel** to download what's shown.
- **Good to know:**
    - This page is for viewing only. Shift assignments are created and changed on Shifts & Roster.
    - Expired assignments stay in the list so you can see where coverage has lapsed.

Overtime

- **Who can use it:** Admin, HR and Managers. Managers see their direct reports' requests plus their own.
- **What it shows:** Overtime requests with employee, request code, date, hours, rate multiplier, reason and status (Pending, Approved, Rejected, Paid). Cards show total requests, pending, approved hours, and payable hours (hours × rate).
- **What you can do:**
    - **Log Overtime** for an employee (date, hours, rate multiplier (1.5× by default), reason).
    - Approve or reject a request from the **Status** drop-down.
    - **Edit** or **Delete** a request.
- **How to log and decide overtime:**
    1. Click **+ Log Overtime**. Pick the employee, enter the date and hours, adjust the rate if needed, and add a reason. Click **Log Overtime**.
    2. To decide a request, open the **Status** drop-down on its row and choose **Approved** or **Rejected**.
- **Good to know:**
    - Every new request starts as Pending and follows your approval rules, whatever status you pick.
    - You can't approve your own overtime. Managers decide only for their direct reports.
    - **Paid** is set when a payroll run pays the overtime. You can't set it yourself, and paid requests can't be edited or deleted.
    - For requests that went through an approval rule, the employee, date, hours and status are locked here.
    - You'll be asked to confirm before a request is deleted.

Comp-Off

- **Who can use it:** Admin, HR and Managers. Managers see their direct reports' credits plus their own.
- **What it shows:** Comp-off credits (a day off earned for working on a holiday or day off): employee, request code, worked-on date, avail-by date, availed-on date, reason and status (Pending, Approved, Availed, Expired, Rejected). Cards show total credits, pending, available to take, and availed/expired.
- **What you can do:**
    - **Credit Comp-Off** to an employee (worked-on date, optional avail-by date, reason).
    - Change status from the row drop-down (approve, reject, or mark **Availed** or **Expired**).
    - **Edit** or **Delete** a credit.
- **How to credit a comp-off and record it as taken:**
    1. Click **+ Credit Comp-Off**. Choose the employee, enter the **Worked On** date, an optional **Avail By** date and a reason, then click **Credit Comp-Off**.
    2. When the employee takes the day, set the row's status to **Availed**. If no availed date is set, today's date is recorded.
- **Good to know:**
    - New credits always start as Pending and follow your approval rules.
    - Nobody approves their own credit. Managers decide only for their direct reports.
    - Credits don't expire on their own. HR marks a credit **Expired** when its avail-by date has passed.
    - Comp-off credits are tracked separately and don't change leave balances.

    - You'll be asked to confirm before a credit is deleted.

Overtime & Comp-Off Report

- **Who can use it:** Admin, HR and Managers. Managers see only their direct reports.
- **What it shows:** One row per current employee (active, probation or notice) for the calendar year you choose: overtime hours (approved or paid), overtime hours still pending, and comp-off earned, availed and balance (approved but not yet used or expired). A summary line gives company totals.
- **What you can do:**
    - Choose a **Year** and click **Apply**.
    - Download the report with ⬇ **Excel**.
- **How to run the report:**
    1. Type the year (it starts on this year) and click **Apply**.
    2. Click ⬇ **Excel** to download that year's figures.
- **Good to know:**
    - This page is for viewing only.
    - It covers one calendar year (January–December), based on the overtime date and the comp-off worked-on date.
    - Rejected requests aren't counted.
    - Comp-off figures are counts of days, not hours.

Regularization

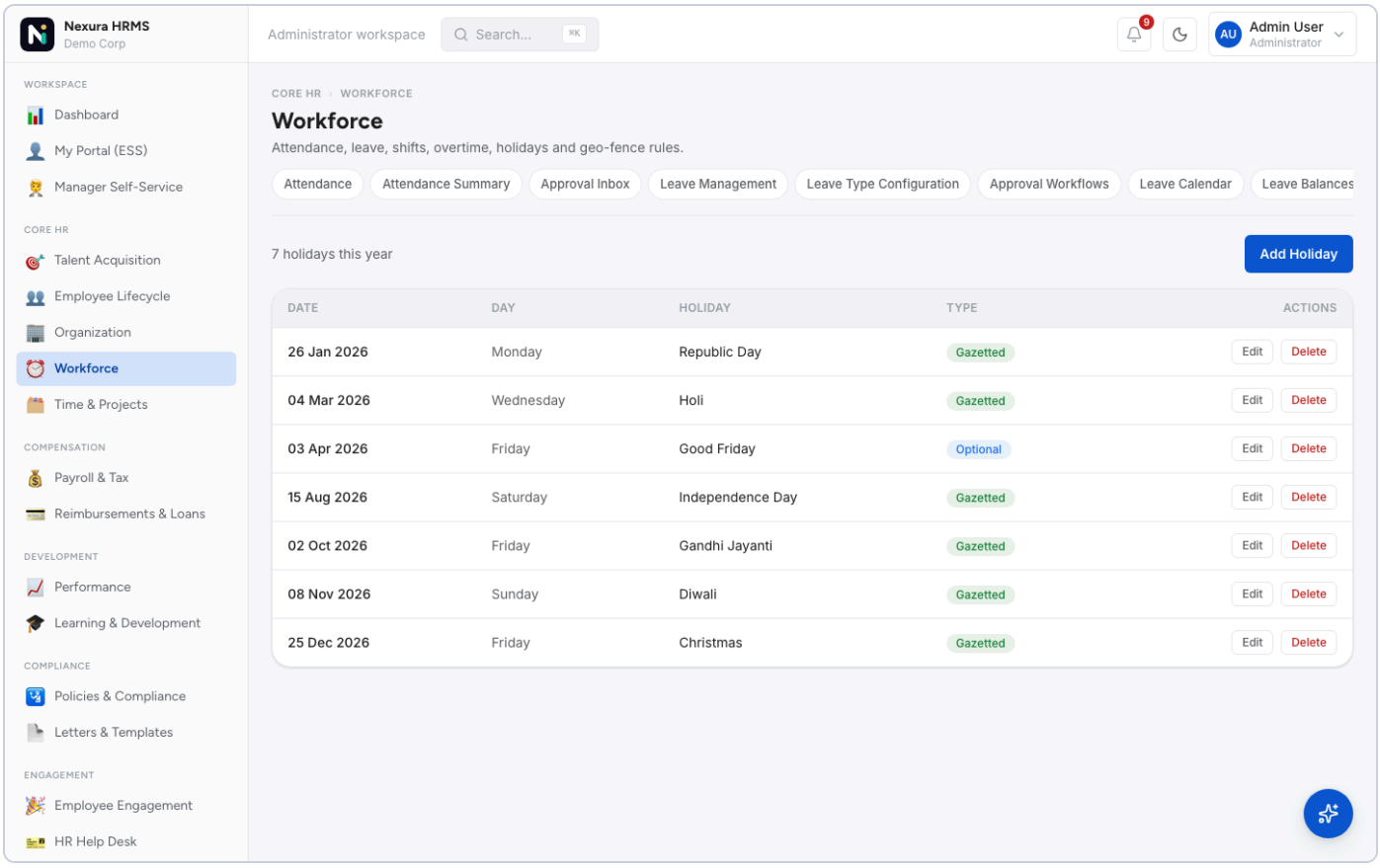
- **Who can use it:** Admin, HR and Managers. Managers see their direct reports' requests plus their own. Employees raise their own requests from My Portal.
- **What it shows:** Attendance correction requests: employee, date, type (Missed Punch, Wrong Punch, Work From Home, On Duty, Late Approval), corrected timing, reason, approver and status. Cards count total, pending, approved and rejected. Filter tabs: **Pending** (the default), **Approved**, **Rejected**, **All**.
- **What you can do:**
    - **Raise Request** for yourself or for an employee.
    - **Approve** a pending request.
    - **Reject** a pending request, with a reason.
- **How to raise and decide a request:**
    1. Click **+ Raise Request**. Choose the employee (or leave it as **Myself**), pick the **Type** and **Date**, and if you like enter **From**/**To** times and a reason. Click **Submit**.
    2. On a pending row, click **Approve**. Or click **Reject**, type the reason and click **Reject Request**.
- **Good to know:**
    - Requests follow your approval rules, and the employee is notified of the decision.
    - Nobody can decide their own request. Managers can raise and decide requests only for their direct reports.
    - When a request is approved, that day's attendance is updated automatically: the times in the request replace the punched ones (a time left blank keeps what was punched), the day

counts as Present (a half day stays a half day), and a note names the request. If there was no punch that day, the day is created and shown as **Regularized**.
    - An approved Work From Home or On Duty request also clears an out-of-fence flag on that day.
    - A request can't be for a future date, **To** must be later than **From**, and Missed Punch and Wrong Punch need at least one time. Only one pending request is allowed per employee per date.

Regularization Aging

- **Who can use it:** Admin, HR and Managers. Managers see only their direct reports.
- **What it shows:** Pending regularisation requests only, oldest first, with request code, employee, attendance date, type, the date it was raised, and how many days it has been waiting. Requests waiting more than 10 days are highlighted in red.
- **What you can do:** Download the list with ⬇ **Excel**.
- **How to clear the backlog:**
    1. Open Regularization Aging and work from the top of the list (oldest first).
    2. Go to the Regularization page or Approval Inbox to approve or reject.
- **Good to know:**
    - This page is for viewing only. There are no approve or reject buttons here.
    - Waiting time is counted from when the request was raised, not from the attendance date.

Holidays



Holidays

- **Who can use it:** Admin and HR can add, edit and delete holidays. Managers can view them.
- **What it shows:** Your company holiday list: date, weekday, holiday name and type (Gazetted or Optional).
- **What you can do:**
    - **Add Holiday** (name, date, and an optional/restricted tick-box).
    - **Edit** or **Delete** a holiday.
- **How to add a holiday:**
    1. Click **Add Holiday**. Enter the holiday name and date, tick **Optional (restricted) holiday** if employees can choose whether to take it, and click **Add Holiday**.
    2. To correct a holiday, click **Edit**, make your change and click **Save Changes**.
- **Good to know:**
    - The list shows every holiday ever entered. There's no year filter.
    - You can't add the same name on the same date twice.
    - Changes also appear on employees' Holiday List in My Portal, which shows the current year.
    - You'll be asked to confirm before a holiday is deleted.

Holiday Calendar

- **Who can use it:** Admin and HR.
- **What it shows:** All declared holidays in date order, with weekday and whether each is Mandatory or Optional, plus counts of each type.
- **What you can do:**
    - Filter with **All**, **Mandatory** or **Optional**.
    - Download the list with ⬇ **Excel**.
- **How to download the calendar:**
    1. Click a filter chip to narrow the list.
    2. Click ⬇ **Excel** to download.
- **Good to know:**
    - This page is for viewing only. To add or change holidays, use the Holidays page.
    - "Mandatory" here means the same as "Gazetted" on the Holidays page.

Geo-Fences

- **Who can use it:** Admin and HR.
- **What it shows:** The GPS boundaries used to check mobile punch-ins: fence name, linked location, coordinates, radius and status. Cards show total fences, active fences, average radius and locations covered.
- **What you can do:**
    - **New Geo-Fence** (name, location, latitude, longitude, radius in metres (100 by default), Active/Inactive, address).
    - **Edit** or **Delete** a fence.
- **How to add or pause a geo-fence:**

1. Click **+ New Geo-Fence**. Enter the name, latitude and longitude, the radius, and if you like the location and address. Click **Create Geo-Fence**.
2. To pause a fence, click **Edit**, set **Status** to Inactive and click **Save Changes**.

- **Good to know:**
  - A fence linked to a location applies to employees at that location. A fence with no location applies to everyone.
  - Punches outside every active fence that applies, or made without sharing location, are flagged for review. They aren't blocked.
  - If no active fence applies to someone, their location isn't checked.
  - You'll be asked to confirm before a fence is deleted.

Geo-Fence Register

- **Who can use it:** Admin and HR.
- **What it shows:** All geo-fences: name, office location, centre coordinates, radius, address and status, with active and total counts.
- **What you can do:**
  - Filter **All**, **Active** or **Inactive**.
  - Download the register with **⬇ Excel**.
- **How to download the register:**
  1. Pick a status chip to filter.
  2. Click **⬇ Excel** to download.
- **Good to know:** This page is for viewing only. Create or change fences on the Geo-Fences page.

Capture Channels

- **Who can use it:** Admin and HR.
- **What it shows:** The ways attendance is captured (Mobile GPS, Biometric, Web Kiosk, QR Code, Face Recognition, Swipe Card, WhatsApp), with location, checks enforced (geo or selfie), last sync and status. Cards count channels, active channels, and channels that enforce geo or selfie checks.
- **What you can do:**
  - **Add Channel** (name, type, device reference, location, and tick-boxes for the checks to enforce).
  - **Activate** / **Deactivate**, **Edit** or **Delete** a channel.
  - For Biometric and Face Recognition channels: **Set up device** to see the connection details, and **Generate secret**, **Rotate secret** or **Revoke** it.
- **How to add a channel and connect a device:**
  1. Click **Add Channel**. Enter a name and type, tick the checks you need, and click **Add Channel**.
  2. For a biometric or face-recognition device, click **Set up device**, then **Generate secret**. Give the connection address, channel ID and secret to your IT team or device vendor.
- **Good to know:**
  - A device can send punches only once a secret is generated and the channel is active.
  - If any active channel has **Enforce selfie capture** ticked, self-service punches need a selfie.

        - Location checks are set up on the Geo-Fences page.
        - **Last Sync** updates automatically.
        - The device set-up details are technical, so share them with your IT team.
        - You'll be asked to confirm before a channel is deleted.

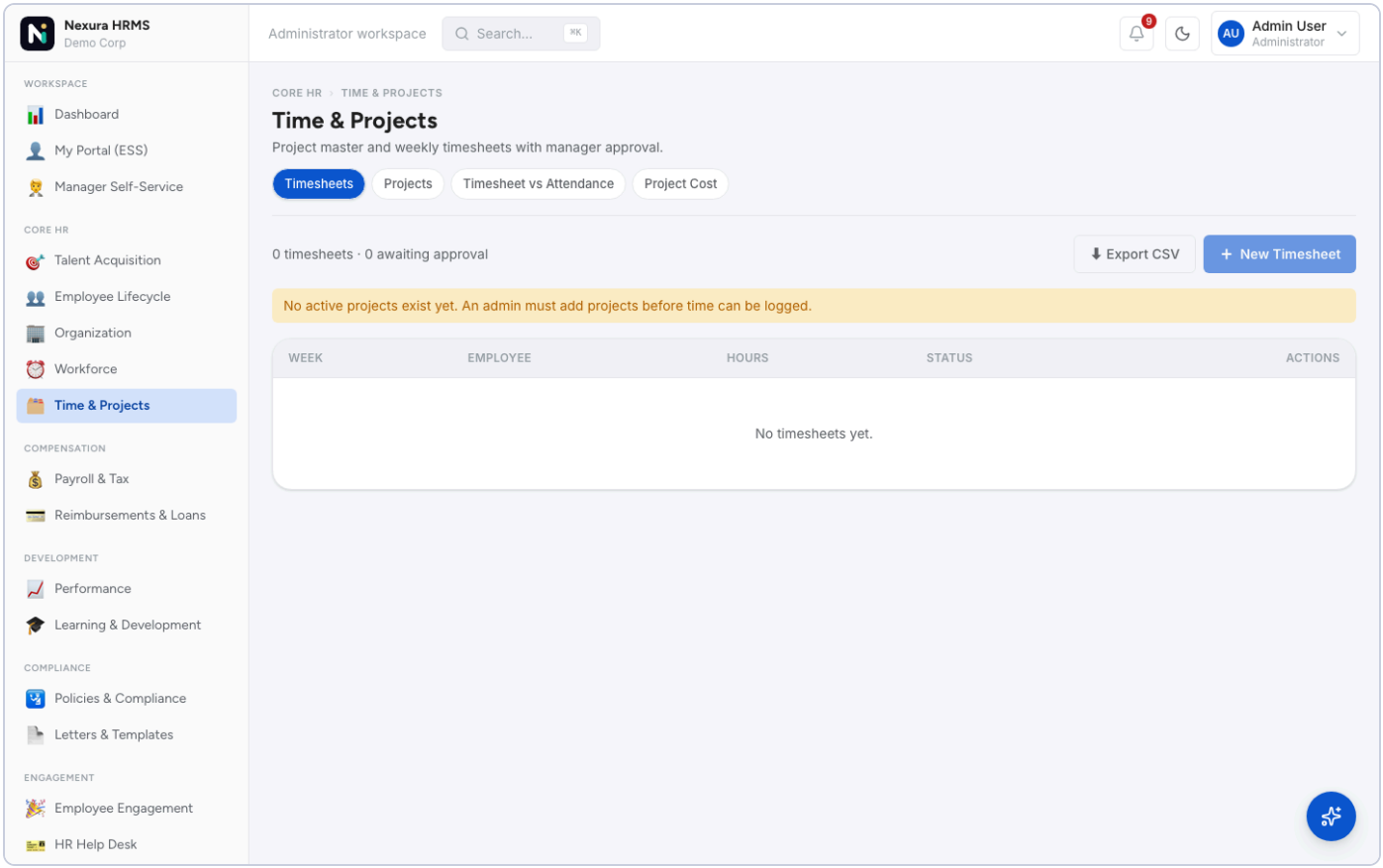
Attendance Channel Register

- **Who can use it:** Admin and HR.
- **What it shows:** Every capture channel, ordered by type then name: device, location, checks required (geo or selfie), last sync and status.
- **What you can do:**
    - Filter by channel type (**All** or a type).
    - Download the list with ⬇ **Excel**.
- **How to download the register:**
    1. Click a type chip to narrow the list.
    2. Click ⬇ **Excel** to download.
- **Good to know:** This page is for viewing only. Add or change channels on the Capture Channels page.

Time & Projects

Track time spent on projects with weekly timesheets that managers approve, and see how that time compares with attendance and what it costs. All roles can use it. Some pages are limited, as noted.

Timesheets



Timesheets

- **Who can use it:** Everyone. Employees see only their own timesheets. Admin, HR and Managers see all timesheets.
- **What it shows:** Weekly timesheets with week dates, employee (for Admin, HR and Managers), total hours and status (Draft, Submitted, Approved, Rejected). Click a row to see its day-by-day entries (date, project, hours, note). Rejected sheets show the reason.
- **What you can do:**
    - **New Timesheet** to log hours per project per day for one week.
    - **Edit**, **Submit** or **Delete** a Draft or Rejected sheet.
    - **Approve** or **Reject** a submitted sheet (Admin, HR, Managers).
    - ⬇ **Export Excel** of all entries (Admin, HR, Managers).
- **How to fill in and approve a timesheet:**
    1. Click **+ New Timesheet** and pick any day in the week. Add rows (project, day, hours, optional note) with **+ Add row**, then click **Save Draft**. When you're ready, click **Submit** on the row.
    2. Approvers: on a Submitted sheet, click **Approve**. Or click **Reject**, enter a reason and confirm with **Reject**.
- **Good to know:**
    - Weeks run Monday to Sunday. There's one sheet per employee per week, so saving the same week again replaces it.
    - Each entry must be more than 0 and no more than 24 hours.
    - You can't submit an empty sheet, or edit one that's submitted or approved.
    - Nobody approves their own sheet. Managers decide only for their direct reports.

    - You can log time once at least one active project exists.
    - You'll be asked to confirm before a sheet is deleted.

Projects

- **Who can use it:** Admin and HR.
- **What it shows:** Your project list: code, name, client, billable or not, number of time entries logged, and status (active or archived).
- **What you can do:**
    - **New Project** (name, client/account, and **Billable** and **Active** tick-boxes).
    - **Edit** a project.
    - **Archive** or **Restore** a project.
- **How to add and archive projects:**
    1. Click **+ New Project**. Enter the project name and client, tick **Billable** if it's charged to a client, and click **Create Project**.
    2. To stop people logging time to a project, click **Archive**. Click **Restore** to bring it back.
- **Good to know:**
    - The project code is created for you.
    - Only active projects can be picked on timesheets.
    - Projects are archived rather than deleted, so past time entries are kept.
    - The **Billable** setting drives the billable/non-billable split in the Project Cost report.

Timesheet vs Attendance

- **Who can use it:** Admin, HR and Managers. Managers see only their direct reports.
- **What it shows:** For each employee with activity in the dates you choose: hours logged on timesheets, hours worked from attendance, and the difference. Flags show days where the hours differ, time was logged with no attendance, or attendance exists with no time logged, with the dates listed. Days within ±0.5 hours count as matched.
- **What you can do:**
    - Set **From** and **To** dates and click **Apply**.
    - Download the day-by-day detail with **⬇ Excel**.
- **How to compare timesheets with attendance:**
    1. Pick the dates (by default, the current Monday–Sunday week) and click **Apply**.
    2. Review rows with flags, then click **⬇ Excel** for the day-by-day breakdown.
- **Good to know:**
    - This page is for viewing only.
    - Timesheet hours include every entry in the dates chosen, whatever the sheet's status, so draft and submitted sheets count too.
    - Attendance uses the hours worked recorded for each day.

Project Cost

- **Who can use it:** Admin, HR and Managers. Managers see only their direct reports' hours.

- **What it shows:** The cost of approved timesheet hours, by project (client, billable or internal, people, hours, cost) and by employee (hourly rate, hours, cost), with total, billable and non-billable cost in rupees.
- **What you can do:**
    - Set **From** and **To** dates and click **Apply**.
    - Download the cost of each entry with ⬇ **Excel**.
- **How to see project costs:**
    1. Choose the dates (by default, this month to date) and click **Apply**.
    2. Click ⬇ **Excel** for the entry-level detail.
- **Good to know:**
    - This page is for viewing only and doesn't affect payroll.
    - Only approved timesheets count.
    - The hourly rate is an estimate: the employee's annual CTC divided by 2,112 hours (8 hours × 22 days × 12 months), not the salary actually paid.
    - Employees with no annual CTC on record are listed in a warning, and their hours are costed at ₹0.

4. Compensation and Development

This section covers the **Compensation** menu group (Payroll & Tax; Reimbursements & Loans) and the **Development** menu group (Performance; Learning & Development).

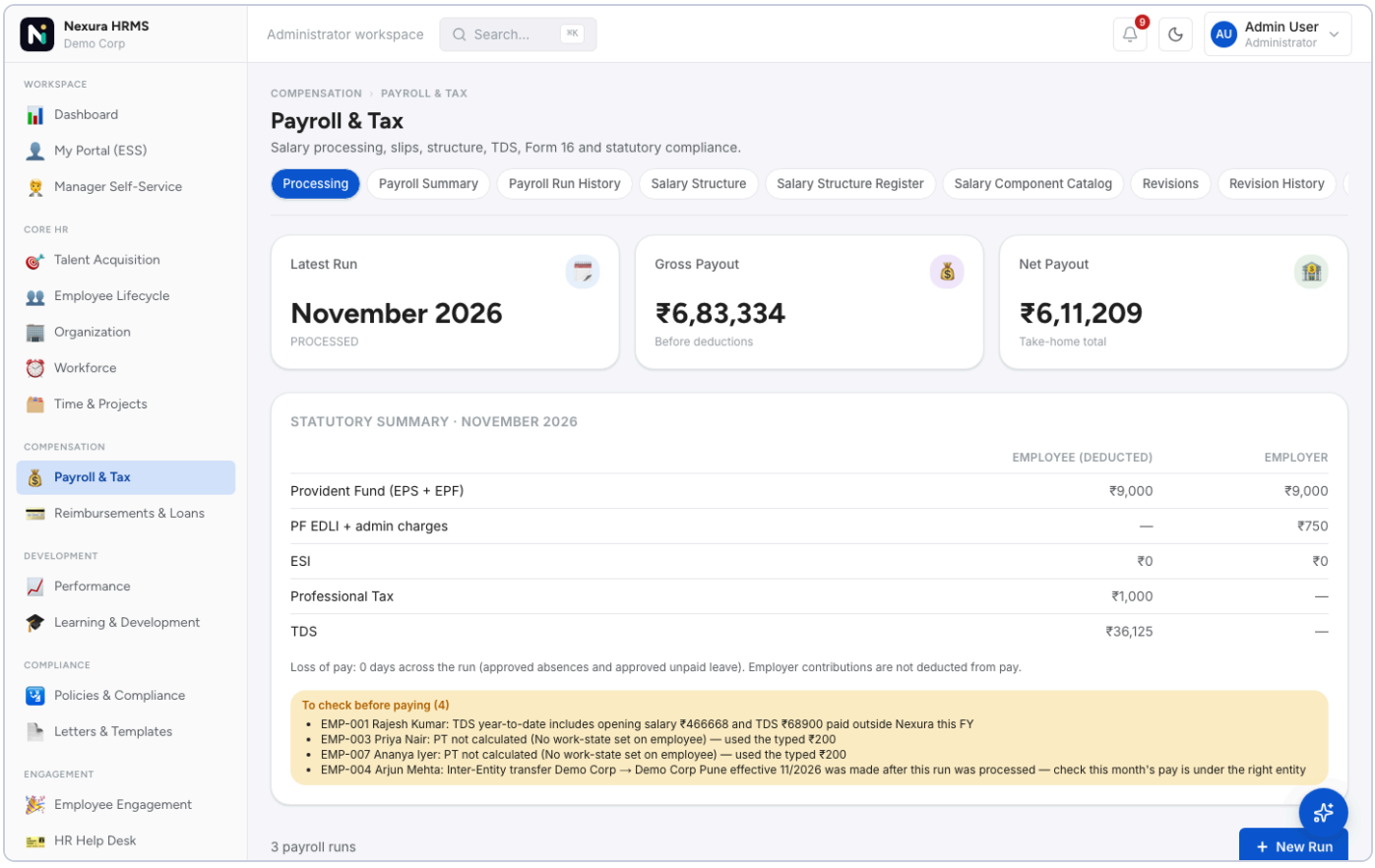
A note on access: the "Who can use it" line names the roles that see each page in the left-hand menu. Your menu shows only the pages your role can open. A few pages also open for Managers from their web address, even though they aren't in a Manager's menu. Where that happens, the entry tells you what a Manager can see and do.

COMPENSATION

Payroll & Tax

Run monthly salaries, keep salary structures and revisions, produce payslips and bank files, and handle income tax (TDS), Form 16 and statutory filings. **Who sees it:** in the menu, Admin and HR only. Each page also checks your role (noted on each page below).

Processing



Payroll processing

- **Who can use it:** Admin and HR only.

- **What it shows:** All your monthly payroll runs, with the period, number of employees paid, gross, net, employer PF + ESI cost and status (Draft, Processed, Paid). For the latest run you also see:
    - summary cards (Latest Run, Gross Payout, Net Payout)
    - a statutory summary (PF, EDLI/admin charges, ESI, Professional Tax, TDS — employee and employer side)
    - total loss-of-pay days
    - a "To check before paying" list of points the system noticed while calculating.
- **What you can do:**
    - Create a run for a month and year (**+ New Run** → **Create Run**). You can have only one run per month.
    - **Process** a draft run, or **Re-process** it after you fix data (not possible once it's Paid).
    - Change the status from the Status drop-down (Draft / Processed / Paid).
    - **Delete** a run that isn't Paid. You'll be asked to confirm first.
    - Download reports for a processed run: pick one from the report list and click **⬇ Download**. The reports are:
        - **Bank File** — choose your bank's layout: Generic NEFT advice, HDFC Bank (ENet), ICICI Bank (CIB), State Bank of India (CINB), Axis Bank (CIB) or Kotak Mahindra Bank (FYN)
        - **Statutory**, **PF ECR**, **ESI Return**, **Professional Tax**, **Labour Welfare Fund**
        - **Register**, **Cost Report**, **Tally (XML)**
        - **Payslips (zip)**.

How to run monthly payroll (full walkthrough)

1. **Check the building blocks.** Your salary components (Basic, HRA, PF and so on) must exist. An Admin adds them under System Administration → Master Data. You can review them in **Salary Component Catalog**.
2. **Choose how PF, ESI and PT are worked out.** Go to **Statutory Rates**, card "How payroll handles PF, ESI and PT". Pick **Calculate from these rate tables** (automatic) or **Use the amounts typed into each salary structure** (manual), and click **Save**. Check the PF/ESI rates and the Professional Tax and Labour Welfare Fund slabs on the same page.
3. **Set up salary structures.** In **Salary Structure**, make sure everyone you're paying has a structure (**+ Add Structure**). Employees without a structure aren't paid.
4. **Tidy up the month's inputs.** Before you process, approve or reject the month's attendance, unpaid leave, overtime and loans. Only approved items are used. Check each employee's bank name, account number and IFSC on their employee record.
5. **Create the run.** On **Processing**, click **+ New Run**, choose the Month and Year, and click **Create Run**. The run appears as Draft.
6. **Process.** Click **Process** on the run's row. Nexura builds a payslip for each eligible employee and the run becomes Processed. Employees get one notification that their payslip is ready in their portal.
7. **Review.** Read the statutory summary and the "To check before paying" list. It covers part-month joiners and leavers, loan EMIs that couldn't be fully recovered, TDS points, and employees skipped because earlier months were paid in your previous payroll system. Use the **Register** and **Statutory** downloads, and **Payroll Summary** and **Salary Slips**, to spot-check figures. If something is wrong, fix it at the source and click **Re-process**. This rebuilds every payslip in the run.

8. **Bank file.** Choose **Bank File** in the report list, pick your bank's format and click ⬇ **Download**. Upload the file in your bank's net-banking portal (you choose the debit account there). You can check **Salary Bank Advice** first to see who is missing bank details.
9. **Statutory and accounting exports.** Download **PF ECR** (for EPFO), **ESI Return**, **Professional Tax**, **Labour Welfare Fund**, **Cost Report** and **Tally (XML)** as you need them.
10. **Mark as paid.** Once the bank has paid salaries, change the Status drop-down to **Paid**. This locks the run.
11. **Payslips.** Employees see their payslips in their own portal. You can download single PDFs in **Salary Slips**, or all of them at once with **Payslips (zip)**.

- **Good to know:**
    - **Calculation mode:** in automatic mode, employee PF, ESI and Professional Tax are worked out from the Statutory Rates tables and the employee's work-location state. PF and PT typed into salary structures are ignored, except PT for states where it can't be worked out monthly. In manual mode, PF and PT are exactly what you typed in the structure, and ESI is deducted only if you added an ESI component and typed an amount. A change of mode applies the next time a run is processed.
    - In both modes, Nexura works out these for you: loss of pay (approved absences, half days and approved unpaid leave), pro-rating for joiners and leavers, approved overtime for the month, shift allowance for approved days worked on a shift that carries one, Labour Welfare Fund in its collection months, active loan EMIs, and monthly TDS projected over the year. A loan EMI is never more than the net pay left; any shortfall stays outstanding. Net pay never goes below ₹0.
    - Process months in order. You can't process, move back to Draft or delete a month while a later month is already Processed or Paid. A run reaches Processed only through the **Process** button, and Paid only from Processed. A Paid run can't be changed, re-processed or deleted.
    - Moving a run back to Draft, or deleting it, removes its payslips and reverses the loan EMIs and overtime it paid.
    - Payslip figures are fixed when the run is processed. Later changes to structures don't affect them unless you re-process.
    - Bank file: rows with missing bank details are still included, with blank fields, so check them first. Banks change their templates from time to time, so check your first upload against your bank's current template.
    - Statutory and tax figures are calculated by the system. Ask your accountant to review the rates and one processed run before you pay real salaries or file returns.

Payroll Summary

- **Who can use it:** Admin and HR only.
- **What it shows:** One row per payroll run (newest first) with status, employees paid, gross, deductions, net, the change in net pay from the previous run, and the processed date, plus a totals row. Deductions are simply gross minus net.
- **What you can do:**
    - Filter by year (type a Year and click **Apply**; leave it blank for all years).
    - Download the summary with ⬇ **Excel**.
- **How to:**

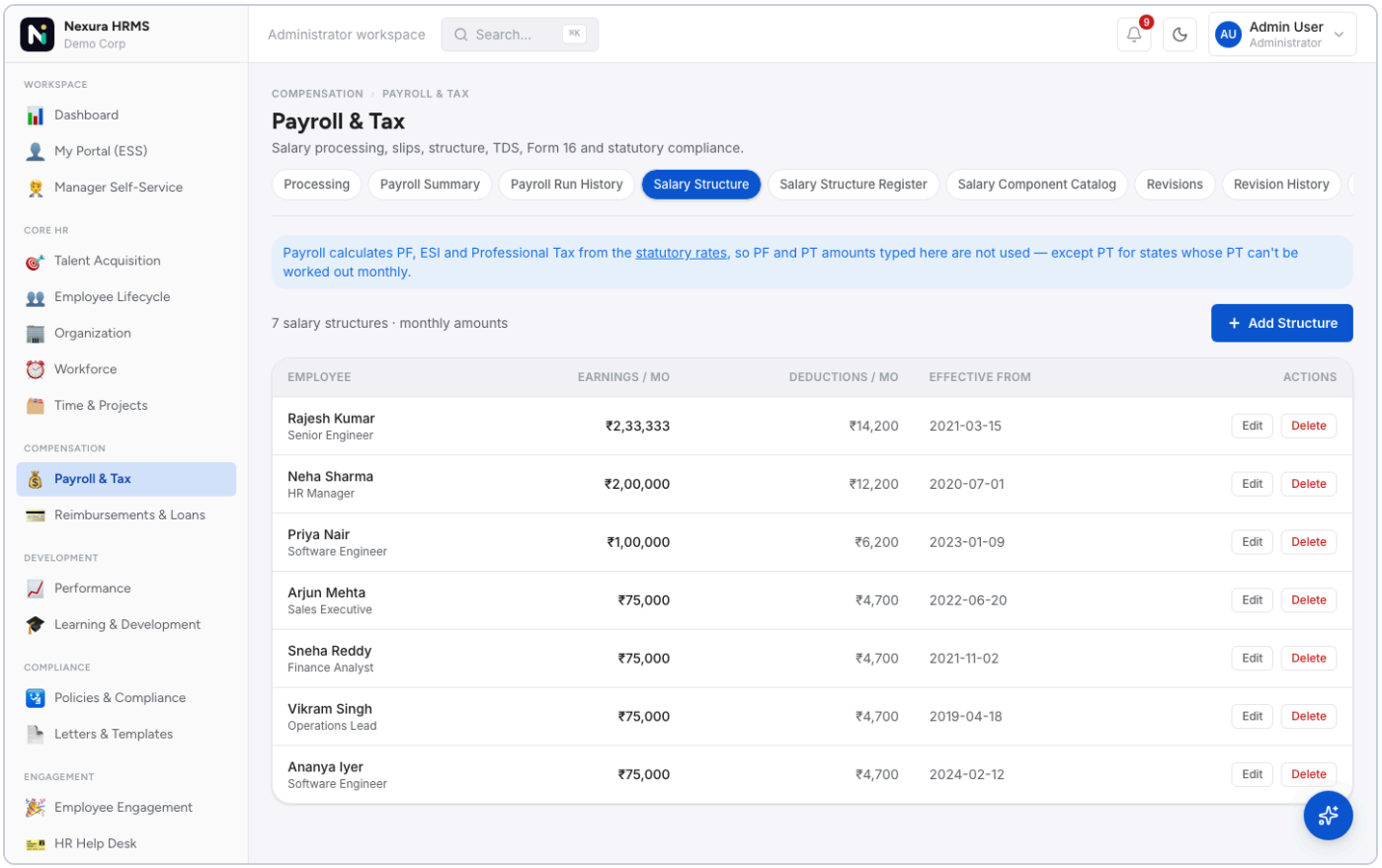
1. Enter the year and click **Apply**.
2. Click ⬇ **Excel** to save it for finance reconciliation.

- **Good to know:** This is a read-only report. Draft runs show zero amounts until they're processed.

Payroll Run History

- **Who can use it:** Admin and HR only.
- **What it shows:** Every payroll cycle (newest first) with number of payslips, gross, net, processed date and status. A headline shows how many runs are paid and the total net paid out (paid runs only).
- **What you can do:**
  - Filter with the chips **All**, **Draft**, **Processed**, **Paid**.
  - Download the list with ⬇ **Excel**.
- **How to:**
  1. Click **Paid** to see only completed cycles.
  2. Click ⬇ **Excel** to export.
- **Good to know:** This page is read-only. To change a run, go to **Processing**.

Salary Structure



Salary structures

- **Who can use it:** Admin and HR only.
- **What it shows:** Each employee's monthly salary structure: earnings per month, deductions per month and the effective-from date. If payroll uses automatic mode, a note reminds you that PF and PT typed

here aren't used.

- **What you can do:**
    - **＋ Add Structure** for an employee who doesn't have one (one structure per employee).
    - **Edit** a structure's component amounts and effective date.
    - **Delete** a structure. You'll be asked to confirm first.
- **How to:**
    1. Click **＋ Add Structure**.
    2. Choose the employee, type the monthly amount for each earning and deduction, optionally set **Effective From**, and click **Add** (or **Save Changes** when editing).
- **Good to know:**
    - You type in all amounts as monthly figures. Total earnings must be more than zero.
    - The list of components comes from Master Data, which an Admin maintains.
    - Each employee has one structure. Editing replaces it, and no history is kept on this page.
    - Changes reach payroll the next time a run is processed.
    - Approving a salary revision doesn't update the structure. Edit the structure here yourself.

Salary Structure Register

- **Who can use it:** Admin and HR only.
- **What it shows:** All salary structures by employee name: Basic, gross, deductions, net and effective-from date, with company-wide monthly gross and net totals.
- **What you can do:**
    - Download the register with **⬇ Excel**.
- **How to:**
    1. Open the page and review the list.
    2. Click **⬇ Excel** to export.
- **Good to know:** This page is read-only. Its totals use only the standard parts typed into each structure (Basic, HRA, Conveyance, Medical, Special, with PF and PT as deductions). Extra components you added, and PF, ESI and PT that payroll works out automatically, aren't included, so these figures can differ from actual payslips.

Salary Component Catalog

- **Who can use it:** Admin and HR only.
- **What it shows:** The earning and deduction components that salary structures are built from — code, name, type, display order and Active/Inactive status — with counts of earnings and deductions.
- **What you can do:**
    - Filter with **All**, **Earning**, **Deduction**.
    - Download with **⬇ Excel**.
- **How to:**
    1. Click **Earning** or **Deduction** to narrow the list.
    2. Click **⬇ Excel** to export.

- **Good to know:** This page is read-only. An Admin adds or changes components under System Administration → Master Data. Only active components appear in the salary structure form. In automatic mode, the components with codes PF, PT, ESI and LWF are worked out by Nexura rather than taken from typed amounts.

Revisions

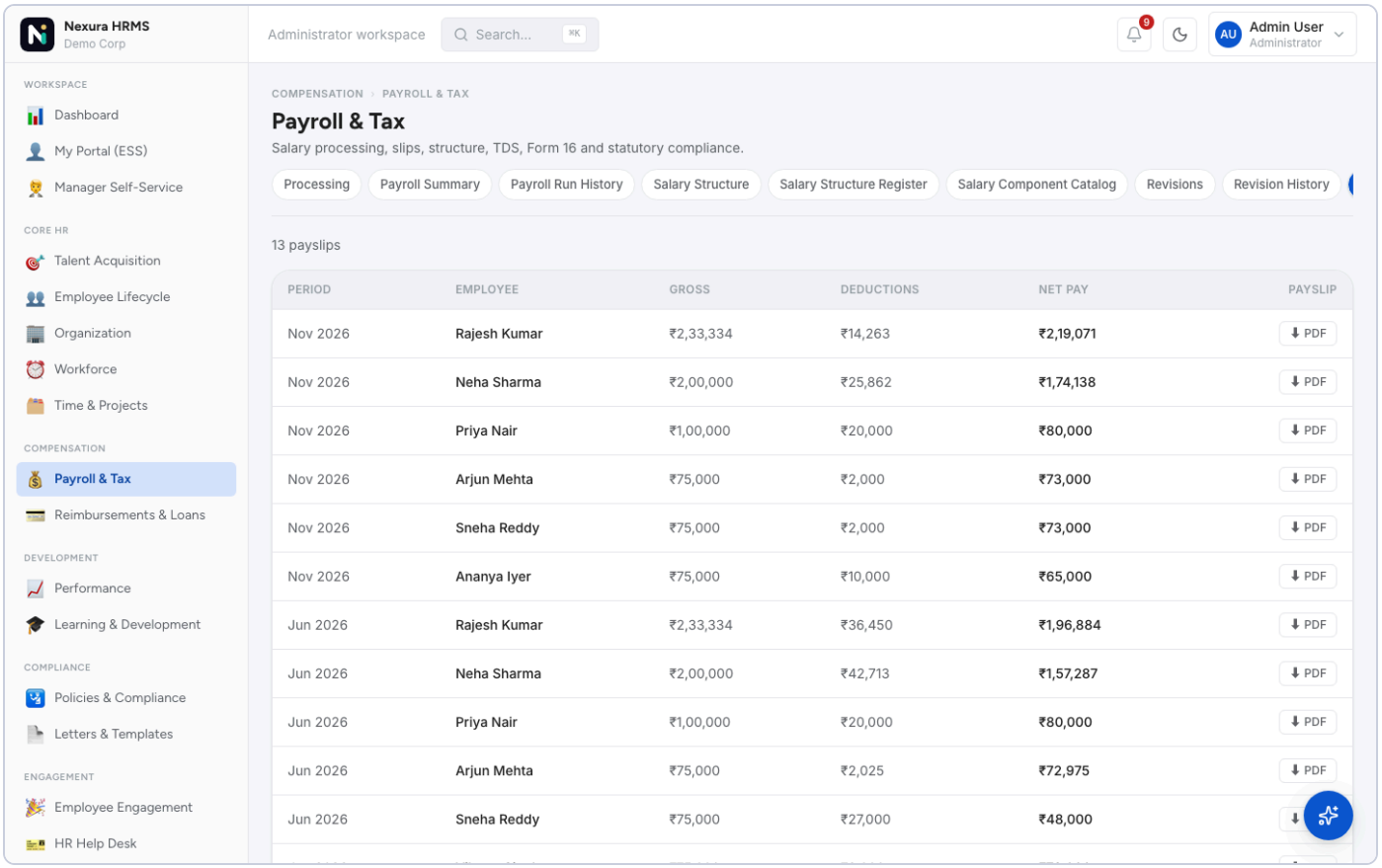
- **Who can use it:** Admin and HR (in the menu). Managers can also open this page from its web address; they see, and can propose revisions for, only their direct reports.
- **What it shows:** Salary revisions with employee, type (Annual Increment, Promotion, Market Correction, Role Change, Retention), previous and revised annual CTC, hike %, effective date and status. Where a revision is going through approval, a link under the status shows which step it's at. Cards show Total Revisions, Proposed, Avg Hike (Effective) and Annual Uplift.
- **What you can do:**
    - **+ Propose Revision** (button **Propose**).
    - **Edit** a revision, or **Delete** it (you'll be asked to confirm first).
    - Change the status from the drop-down (Proposed, Approved, Effective, Rejected) where your role allows it.
- **How to:**
    1. Click **+ Propose Revision**, choose the employee and type, enter Previous CTC (annual) and Revised CTC (annual), the effective date and the reason, and click **Propose**.
    2. The revision starts as Proposed and goes through its approval chain. By default, any HR or Admin user can approve it. Approvers decide it in **Pending Approvals**.
    3. After final approval, set the status to **Effective** when the new pay takes effect.
- **Good to know:**
    - You type in the CTC figures; they aren't taken from the salary structure.
    - The approvers in the chain approve. An Admin can step in at any point; HR can approve only when they're on the current step. Nobody can approve their own pay.
    - Managers can propose, edit while the revision is still Proposed, or withdraw it (Rejected). They can delete only Proposed revisions.
    - Marking a revision Effective **doesn't** change the salary structure or payroll. Update **Salary Structure** yourself.

Revision History

- **Who can use it:** Admin and HR only.
- **What it shows:** All revisions with an effective date in your chosen year (the current year by default): employee and department, type, previous and revised CTC, % change, effective date and status. The headline shows the average % and the total annual amount added, leaving out rejected revisions.
- **What you can do:**
    - Change **Year (effective)** and click **Apply**.
    - Download with **⬇ Excel**.
- **How to:**
    1. Enter the year and click **Apply**.
    2. Click **⬇ Excel** for the increment report.

- **Good to know:** This page is read-only. Proposed and approved revisions that aren't yet effective are included in the averages; only rejected ones are left out.

Salary Slips



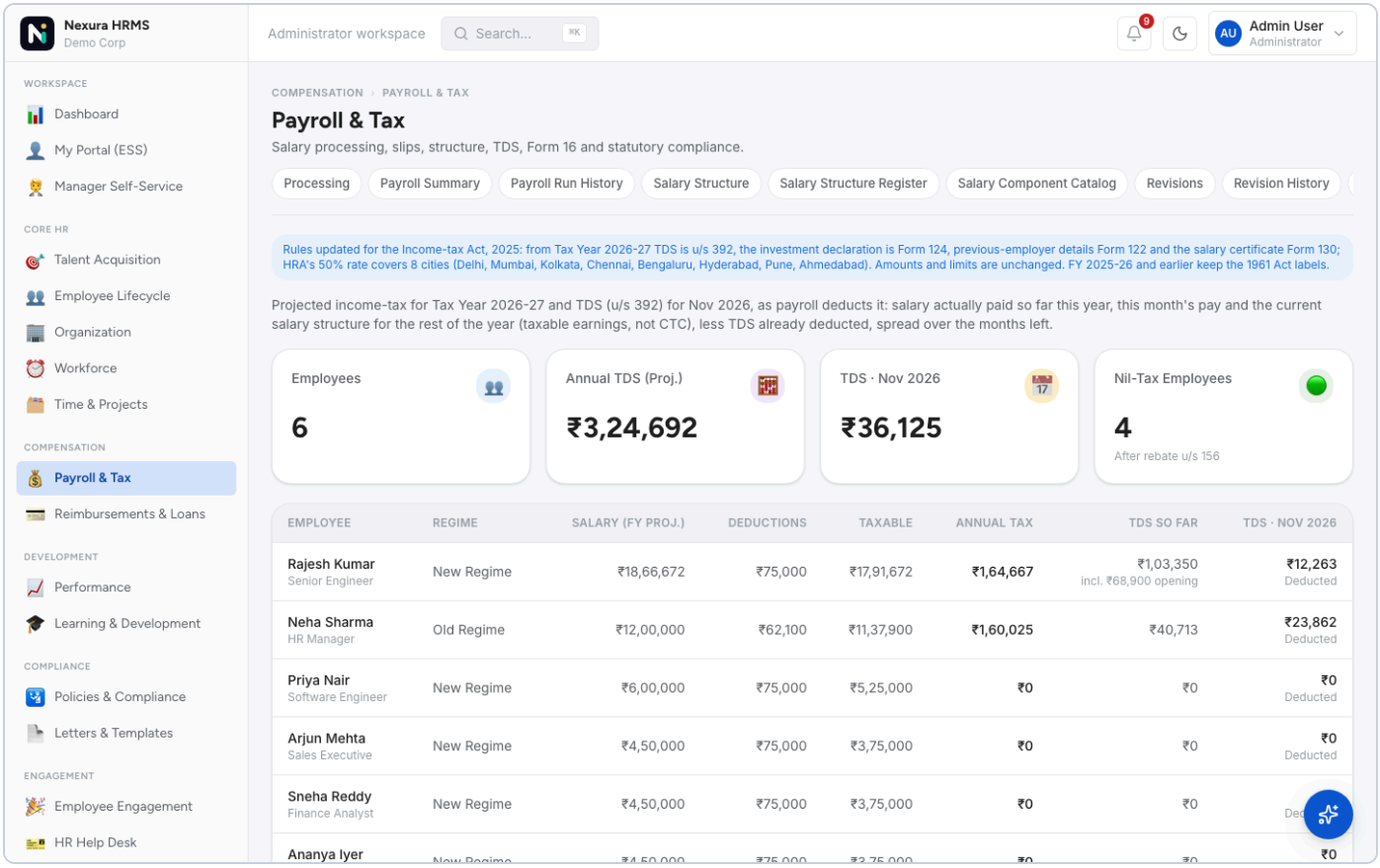
Salary slips

- **Who can use it:** Admin and HR only.
- **What it shows:** Every payslip from processed payroll runs, newest month first: period, employee, gross, deductions and net pay.
- **What you can do:**
    - Download any payslip as a PDF (⬇ **PDF**).
- **How to:**
    1. Find the employee and month in the list.
    2. Click ⬇ **PDF** to download the payslip.
- **Good to know:**
    - This page has no search or filter. To get a whole month at once, use **Payslips (zip)** on **Processing**.
    - Payslips appear once a run is processed, and are removed if the run goes back to Draft or is deleted.
    - Employees download their own payslips from their portal. Managers can download only their own and their direct reports'.

Salary Bank Advice

- **Who can use it:** Admin and HR only.
- **What it shows:** For the payroll run you choose, each employee's net pay with bank name, masked account number (last 4 digits) and IFSC. It totals net pay, shows "payable now" (employees with complete bank details), and marks rows **incomplete** where the bank name, account or IFSC is missing.
- **What you can do:**
    - Choose a **Payroll run** and click **Apply**.
    - Download the advice with ⬇ **Excel**.
- **How to:**
    1. Pick the run and click **Apply**.
    2. Fix any **incomplete** rows on the employee record, then download with ⬇ **Excel** (or use the bank-specific **Bank File** on **Processing**).
- **Good to know:** This page is read-only. Net pay comes from the processed payslips. Bank details are shown as they are on the employee record when you open the page.

TDS



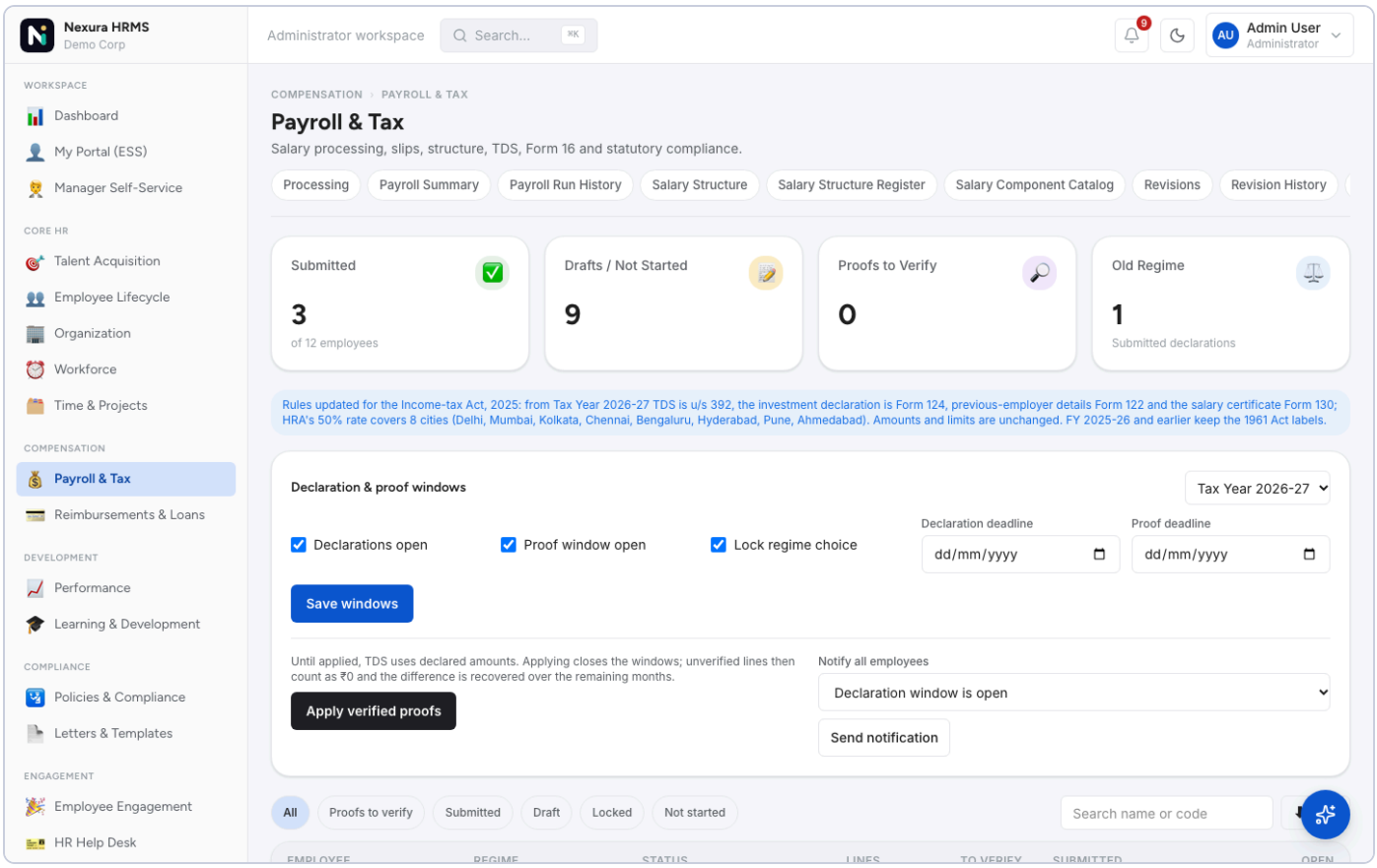
TDS computation

- **Who can use it:** Admin and HR. (Employees see their own tax on My Portal → My Tax / TDS.)
- **What it shows:** Each employee's projected income tax for the year and this month's TDS, worked out the same way the payroll run deducts it. It takes salary already paid this year, this month's pay and the current salary structure for the rest of the year, subtracts TDS already deducted, and spreads the balance over the months left. You see the regime, projected salary, deductions, taxable income, annual tax, TDS so far and this month's TDS (marked "Deducted" once payroll is processed, otherwise

"Projected"). It covers employees who have a salary structure and are active, on probation or serving notice.

- **What you can do:**
    - Pick the financial year for the opening figures panel.
    - ＋ **Opening figures**: enter salary, TDS, employee PF, professional tax and (Old Regime) HRA exemption paid this year outside Nexura — either by your previous payroll system or by the employee's previous employer.
    - ⬆ **Import**: load opening figures in bulk from an Excel template.
    - **Edit** or **Add** opening figures for each employee.
- **How to:** Enter opening figures for someone who joined mid-year
    1. Scroll to "Opening year-to-date" and click ＋ **Opening figures**.
    2. Choose the employee and **Paid by** (Previous payroll system or Previous employer).
    3. Set **Covers up to** (the last month included), then enter Gross salary and the other amounts.
    4. Click **Save**. To remove the figures later, edit them, clear Gross and save.
- **Good to know:**
    - This page only shows figures; nothing here changes payroll.
    - You type in opening figures; they aren't calculated. They must cover months before the employee's first Nexura payslip, and Nexura won't pay or project those months.
    - You can't enter figures on your own record. Ask another Admin or HR user.
    - The regime and deductions come from the employee's tax declaration.
    - Tax labels follow the Income-tax Act, 2025 from Tax Year 2026-27.
    - Have an accountant review the projections.

Tax Declarations



Tax declarations (HR view)

- **Who can use it:** Admin and HR only. Employees fill in their own declaration in their portal (**My Tax Declaration**), not here.
- **What it shows:** Every employee's income-tax declaration for the year you choose: regime (Old/New), status (Not started, Draft, Submitted, Locked), number of lines, proofs waiting to be verified, and the submission date. Opening a declaration shows a section-by-section summary (claimed vs allowed, with caps), each line with its uploaded proof files, and any previous-employer details.
- **What you can do:**
    - Set the year's windows — **Declarations open**, **Proof window open**, **Lock regime choice**, and the declaration and proof deadlines — then click **Save windows**.
    - **Apply verified proofs**, or **Undo — back to declared amounts**.
    - **Send notification** to all employees (window open, or reminders to those who haven't submitted or uploaded proofs).
    - Filter by status, search, and download ⬇ **Excel**.
    - **Review** a declaration: for each line, enter a verified amount and click **Verify**, **Resubmit** or **Reject** (you need to add a note to reject).
    - Previous employer: **Verify & add to TDS**, **Resubmit** or **Reject**.
    - 🔒 **Lock declaration** / 🔓 **Unlock declaration**.
- **How to:** Verify proofs and apply them to TDS
    1. Filter **Proofs to verify** and click **Review** on an employee.
    2. For each line, open the 📎 proof, check the verified amount and click **Verify** — or **Resubmit** or **Reject** with a note.
    3. When everyone is done, go back to the list, click **Apply verified proofs** and confirm.

- **Good to know:**
    - Until you apply proofs, TDS uses the declared amounts. Applying closes the windows. After that, unverified lines count as ₹0 and any extra tax is recovered over the remaining months.
    - If you haven't saved any windows, declarations and regime changes are open and proofs are closed.
    - An employee with no declaration is treated as New Regime. A submitted declaration updates the regime on the employee record.
    - Verifying previous-employer details copies them into the opening figures on the TDS page. If HR has already entered previous-employer figures on the TDS page for that employee and year, verifying is refused until you reconcile the two.
    - You can't verify your own declaration.

Investment Proofs

- **Who can use it:** Admin and HR (in the menu). Managers can also open this page from its web address and use it for themselves and their direct reports. Only Admin and HR can change a proof's status (verify it).
- **What it shows:** A list of investment proofs: employee, financial year, section (80C, 80D, 80CCD(1B), 24(b), 80E, 80G, HRA, LTA, Other), instrument, amount, submitted date and status. Totals show the number of proofs, those pending review, those needing follow-up and the approved value.
- **What you can do:**
    - **+ File Proof**: record a proof for an employee (employee, year, section, instrument, amount, date, remarks).
    - **Edit** a proof, or **Delete** it (you'll be asked to confirm first).
    - Change the status from the drop-down (Submitted, Approved, Rejected, Resubmission required). Admin and HR only.
- **How to:** Record and approve a proof
    1. Click **+ File Proof**, choose the employee, section and instrument, and enter the amount.
    2. Save it. It starts as Submitted.
    3. Once you've checked it, change its status to Approved in the Status column.
- **Good to know:**
    - This is a separate register from Tax Declarations. Proofs recorded here **don't** change the TDS calculation — TDS uses only the lines verified on **Tax Declarations**. Use Tax Declarations for anything that should affect tax.
    - Nobody can verify their own proofs, and only Admin and HR can change a verified proof.
    - You can't attach files on this page.

Investment Proof Status

- **Who can use it:** Admin and HR only.
- **What it shows:** A read-only, per-employee summary of the Investment Proofs register for one financial year: number of proofs, total declared, total approved, and how many are pending (submitted or sent back) or rejected. It opens on the latest year on record.
- **What you can do:**
    - Switch financial year with the year chips.

    - Download the summary as an Excel file.
- **How to:** Check who still has proofs outstanding
    1. Pick the financial year.
    2. Look at the Pending and Rejected columns, then follow up on the **Investment Proofs** page.
- **Good to know:** This page only reports. It summarises the Investment Proofs register, not the proofs on Tax Declarations. "Approved" counts only proofs marked Approved there. As with that register, these figures don't feed TDS.

Form 16

- **Who can use it:** Admin and HR. Employees, including Managers, get their own Form 16 in My Portal → My Form 16.
- **What it shows:** The Form 16 register for the current financial year: each employee with payslips this year, PAN, gross salary actually paid, tax liability, TDS deducted and the balance, with links to Part A and Part B.
- **What you can do:**
    - **Upload** Form 16 Part A PDFs downloaded from TRACES — in bulk (matched by the PAN in the file name) or one file for a chosen employee.
    - ⬇ **Part A**: download the uploaded Part A.
    - ⬇ **PDF**: download Part B, which Nexura prepares.
- **How to:** Issue Form 16
    1. Download Part A files for all employees from the TRACES portal.
    2. In "Upload Form 16 Part A (from TRACES)", choose the PDF files, leave "Match by PAN in file name" selected and click **Upload**.
    3. Check the "Uploaded for" and "Not uploaded" messages. For any misses, upload a single file with the employee chosen.
    4. Check each Part B with ⬇ **PDF**.
- **Good to know:**
    - Part A comes from TRACES and you upload it; Nexura doesn't create it.
    - Part B **is** prepared by Nexura from this year's payslips, plus any opening figures on the TDS page. A previous employer's salary is shown separately.
    - A new upload replaces that employee's Part A for the year.
    - The page shows only the financial year in progress; there's no year picker.
    - Have an accountant review Part B before you issue it.

Gratuity

- **Who can use it:** Admin and HR only.
- **What it shows:** The gratuity provision as of today for everyone still employed (active, probation, notice). It's worked out as (15 ÷ 26) × monthly Basic + DA × completed years, capped at ₹20 lakh. You see the date of joining, completed years, monthly Basic + DA, the gratuity amount (for eligible staff only) and eligibility. Totals show employees, the eligible count and the total provision.
- **What you can do:** View only. There are no buttons on this page.
- **How to:** Check the gratuity liability

1. Open the page and read **Total Provision**.
2. Review rows marked "(capped)" or "Not Yet Eligible" as needed.

- **Good to know:**
  - Everything here is calculated; nothing is typed in.
  - Eligibility starts after 5 years. The fifth year counts once someone has completed 4 years plus 190 working days (5-day week) or 240 days (otherwise), based on your company's weekly offs. Working days are estimated from calendar days.
  - Basic + DA comes from the salary structure, so an employee without a structure shows ₹0.
  - Actual payouts happen through Full & Final settlement, not here.
  - Have an accountant review the figures.

Gratuity Eligibility

- **Who can use it:** Admin and HR only.
- **What it shows:** Each current employee's completed years, the date they become eligible for gratuity, monthly Basic + DA, estimated gratuity and status: Eligible, Approaching (eligible within 12 months) or still building service. It uses the same calculation as the Gratuity page.
- **What you can do:**
  - Filter **Eligible (5+ yrs)** or **Approaching (≤12 mo)**.
  - Download the list as an Excel file.
- **How to:** Plan for upcoming gratuity liability
  1. Click **Approaching (≤12 mo)**.
  2. Download the Excel file and share it with finance.
- **Good to know:** This is a read-only report. Amounts are estimates based on today's salary structures, and employees without a structure show ₹0.

Leave Encashment

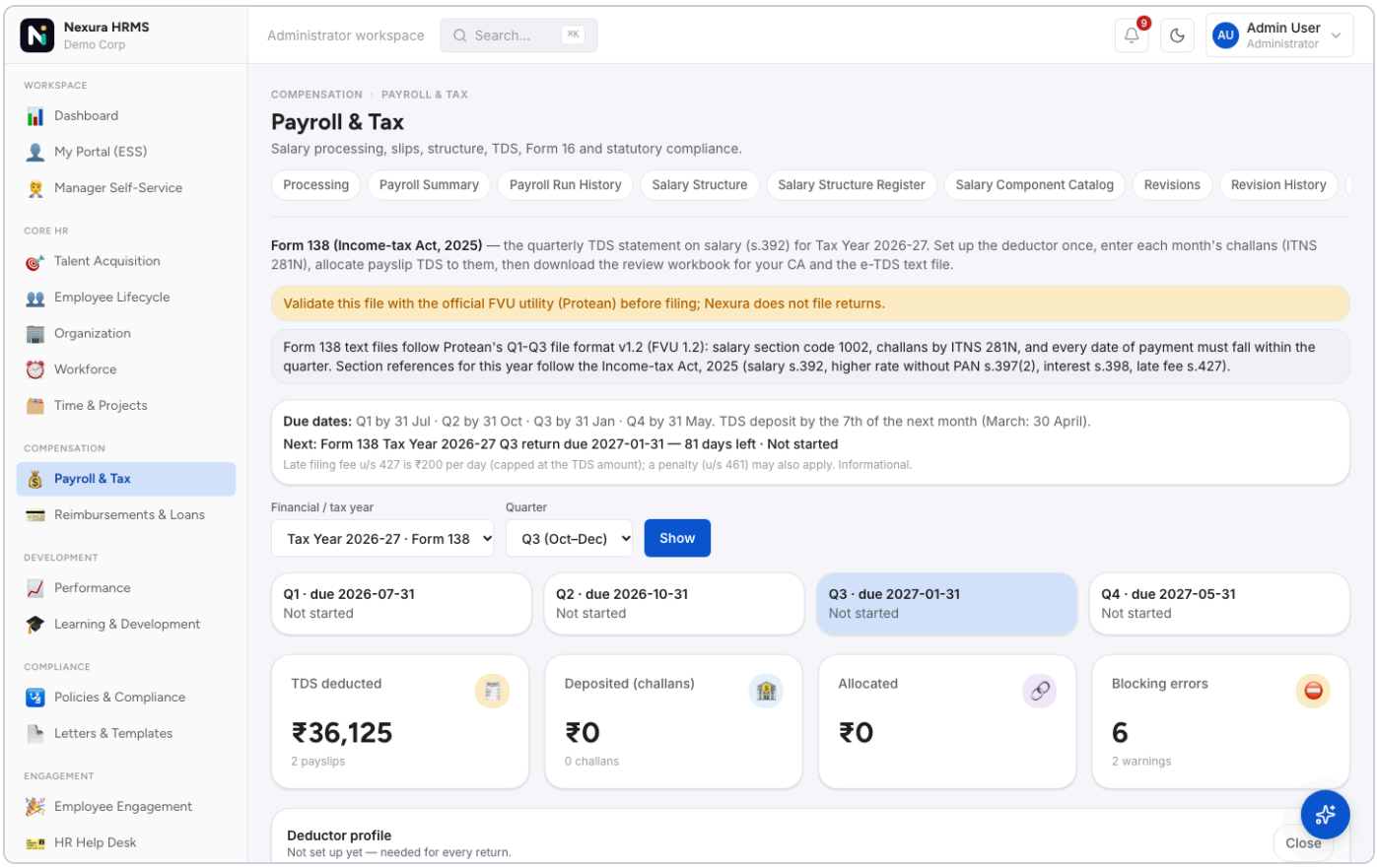
- **Who can use it:** Admin and HR only.
- **What it shows:** The estimated cost of unused paid leave for each employee in a leave year: encashable days, per-day pay (Basic + DA ÷ 26) and the provision. The page header shows total days and the total provision.
- **What you can do:**
  - Enter a leave year and click **Apply**.
  - Download the provision as an Excel file.
- **How to:** Get the year-end leave liability
  1. Type the leave year and click **Apply**.
  2. Download the Excel file for finance.
- **Good to know:**
  - This page only reports; it doesn't pay out encashment.
  - Encashable days = brought forward + leave earned to date − used − pending. These are the same rules the Full & Final settlement uses to pre-fill leave.

    - **Every paid leave type is counted**, because you can't mark individual leave types as encashable or not.
    - Employees without a salary structure have no per-day rate.
    - Treat the figures as an estimate.

Statutory

- **Who can use it:** Admin and HR only.
- **What it shows:** A summary of PF, ESI, Professional Tax and TDS deducted on payslips, with the employee share, employer share, total and filing due dates. It also shows the percentage of active employees who have a UAN, an ESIC number and a PAN.
- **What you can do:**
    - View the totals.
    - Click **Prepare return** → to go to TDS Returns.
- **How to:** Get the figures for a filing
    1. Read the Employee, Employer and Total figures for PF, ESI or PT.
    2. For TDS, click **Prepare return** →.
- **Good to know:**
    - Totals cover **all payslips ever generated**. There's no month or period filter, and no ECR or challan file is produced here (download the PF ECR and ESI Return from **Processing**).
    - Payslips processed before employer contributions were recorded add nothing to the Employer column. Re-processing those runs brings them in.
    - Use the figures as a starting point, and have an accountant prepare and check the actual filings.

TDS Returns (24Q / 138)

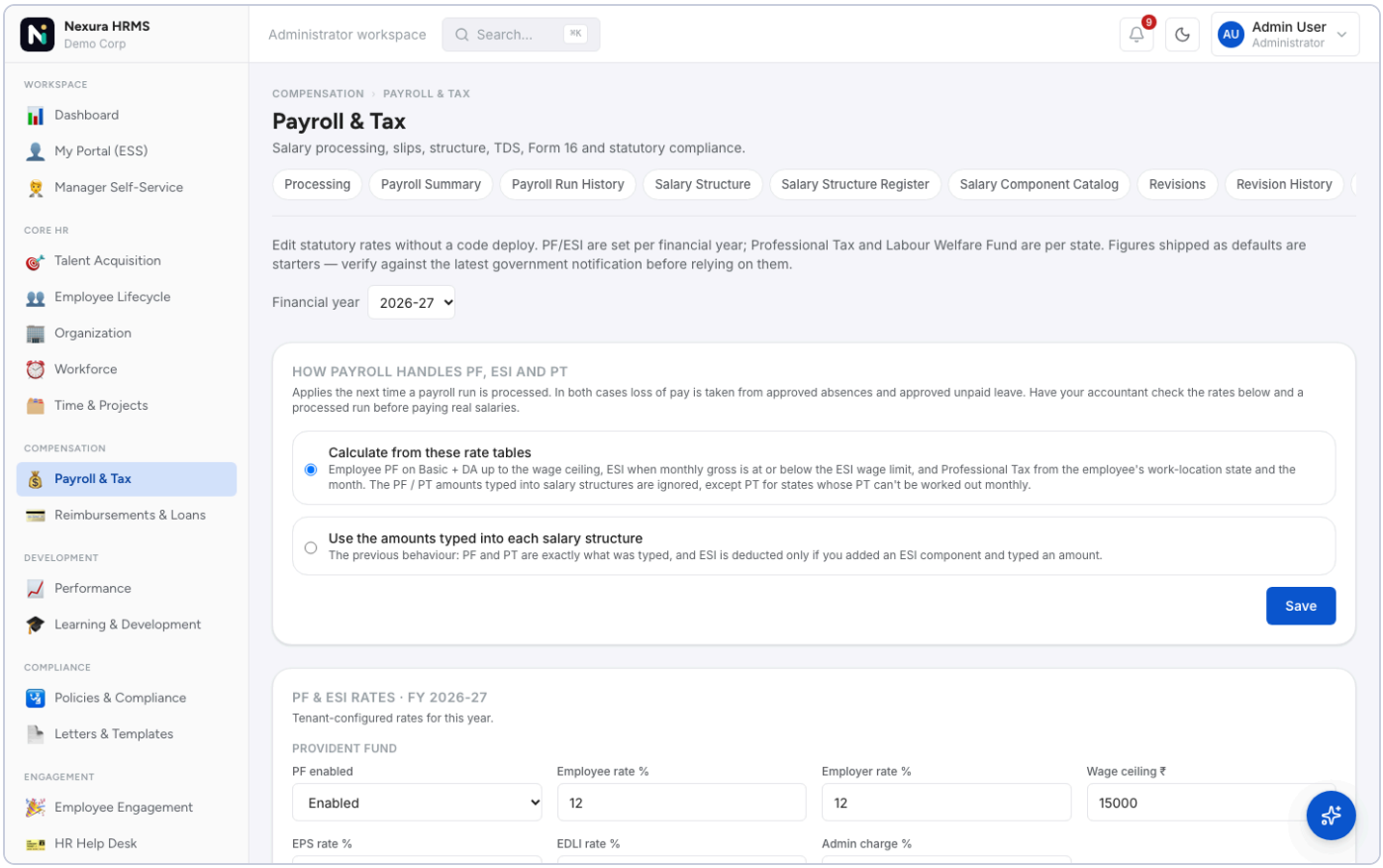


TDS returns

- **Who can use it:** Admin and HR only.
- **What it shows:** The quarterly salary TDS statement for the year and quarter you choose: Form 24Q up to FY 2025-26, and Form 138 from Tax Year 2026-27. It shows due dates and days left, each quarter's status (Not started, Draft, Generated, Filed), TDS deducted vs deposited vs allocated, a month-by-month reconciliation, and a pre-flight list of errors and warnings.
- **What you can do:**
    - Choose the year and quarter and click **Show**.
    - **Edit** and **Save deductor profile** (TAN, PAN, address, responsible person, salary pay day).
    - **Save token** for the previous regular statement.
    - **Add challan**, and **Edit** or **Delete** challans (you'll be asked to confirm a delete).
    - **Auto-allocate by month**, **Re-allocate**, or **Edit** a single payslip's allocation.
    - Download the **Review workbook (.xlsx)** and **Generate e-TDS text file (.txt)**.
    - **Mark as filed** (token/RRR number, date, optional acknowledgement) or **Undo filed mark**.
- **How to:** Prepare a quarterly return
    1. Set up the deductor profile once and click **Save deductor profile**.
    2. For each month, click **Add challan**, enter the CIN details from the bank challan, and click **Save challan**.
    3. Click **Auto-allocate by month** and fix any payslip that isn't fully allocated.
    4. Clear all blocking errors in Pre-flight validation.
    5. Download the workbook for your CA and the text file, then validate the file with Protean's FVU.
    6. After filing, enter the token and click **Mark as filed**.

- **Good to know:**
    - Nexura **doesn't** file returns for you. Validate the text file with the official FVU utility before you file.
    - You type in challans yourself.
    - The text file is available for FY 2023-24 to 2025-26 (24Q) and for Form 138 Q1–Q3. For Form 138 Q4, use the review workbook. Prepare older years in the RPU.
    - For Q4, the pre-flight check also needs the landlord's PAN and name where rent is above ₹1 lakh a year, and the lender's PAN and name for home-loan interest. These come from employees' tax declarations.
    - A filed quarter is locked. Prepare any correction statement outside Nexura.

Statutory Rates



Statutory rates

- **Who can use it:** Admin and HR only.
- **What it shows:** The settings payroll uses for statutory deductions: how PF, ESI and PT are calculated, PF and ESI rates for a financial year, Professional Tax slabs by state and Labour Welfare Fund amounts by state.
- **What you can do:**
    - Choose **How payroll handles PF, ESI and PT**:
        - **Calculate from these rate tables** (automatic — the default).
        - **Use the amounts typed into each salary structure** (manual).
    - Click **Save** to apply your choice.

    - Pick a financial year, edit PF (enabled, employee/employer %, wage ceiling, EPS, EDLI, admin charge), ESI (enabled, rates, wage threshold) and LWF (enabled), and click **Save Rates**.
    - **+ Add slab**, **Edit** or **Del** for PT slabs by state.
    - **+ Add state**, **Edit** or **Del** for LWF (employee and employer amount, monthly or annual).
    - You'll be asked to confirm before a slab or state is removed.

- **How to:** Set up statutory deductions before your first payroll
    1. Under "How payroll handles PF, ESI and PT", choose automatic or manual and click **Save**.
    2. Select the financial year, check the PF and ESI rates and click **Save Rates**.
    3. Add or adjust PT slabs and LWF for the states where you have staff.
- **Good to know:**
    - In automatic mode, PF is calculated on Basic + DA up to the wage ceiling, ESI applies when gross is at or below the limit, and PT is based on the employee's work-location state. PF and PT typed into salary structures are ignored, except PT for states where it can't be worked out monthly.
    - In manual mode, PF and PT are exactly what's typed into the salary structure, and ESI applies only if an ESI component has been added.
    - Changes apply the next time a payroll run is processed.
    - If you haven't saved anything, Nexura's built-in starter rates and slabs are used. Check them against current government notifications, and have your accountant check the rates and one processed run before you pay real salaries.

Reimbursements & Loans

Handle expense claims, employee loans and salary advances, and company assets (laptops, phones, cards) issued to staff. The module appears in the menu for **Admin and HR** only. Four of its pages (Expense Claims, Expense Claims Report, Loans & Advances and Assets Issued) also open for Managers from their web address; each page says what a Manager can see and do.

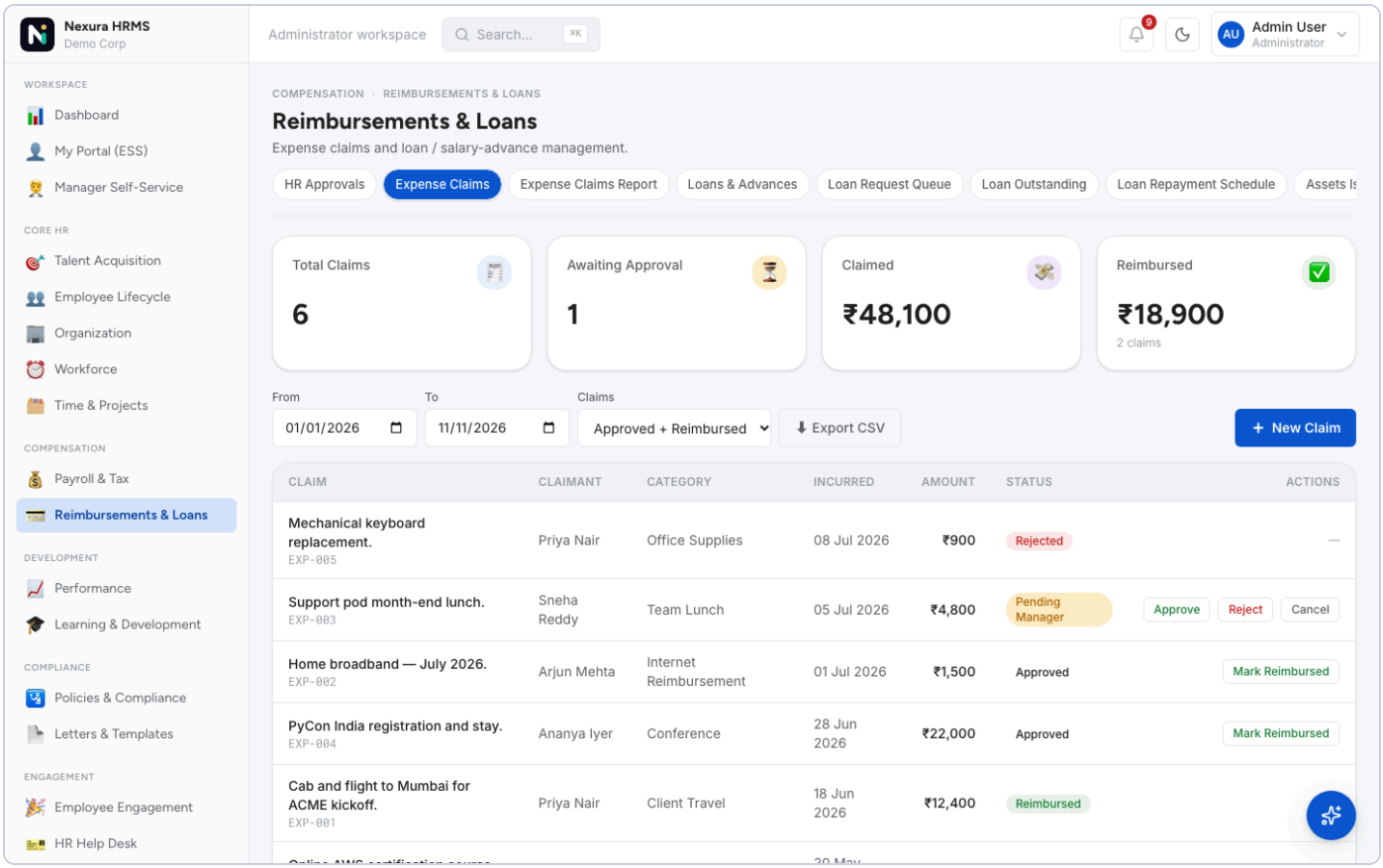
HR Approvals

- **Who can use it:** Admin and HR only.
- **What it shows:** One inbox of everything waiting for HR. Counter cards and tables show five kinds of item: expense claims at the HR stage, submitted investment proofs, profile-change requests, asset requests and loan/advance requests. When nothing is waiting, the page tells you the inbox is clear.
- **What you can do:**
    - **Approve** or **Reject** each item, row by row.
    - Approving a loan/advance request creates an active loan straight away. Its EMI is then deducted through payroll.
    - Approving a profile change applies the requested changes. The table shows each old value struck through, followed by the new value.
- **How to:**
    1. Open HR Approvals and look at the counter cards to see what's waiting.
    2. In the section you need (for example "Loan / Advance Requests"), check the amount, EMI and reason.

3. Click **Approve** or **Reject**. The row disappears and the employee gets a notification.

- **Good to know:**
  - There's no comment box here, so decisions are recorded without a note.
  - You can't approve your own expense claim or investment proof. Ask another HR or Admin user to do it.
  - After you approve an asset request here, click **Mark Fulfilled** on **Assets Issued** once the item has been handed over.

Expense Claims



Expense claims

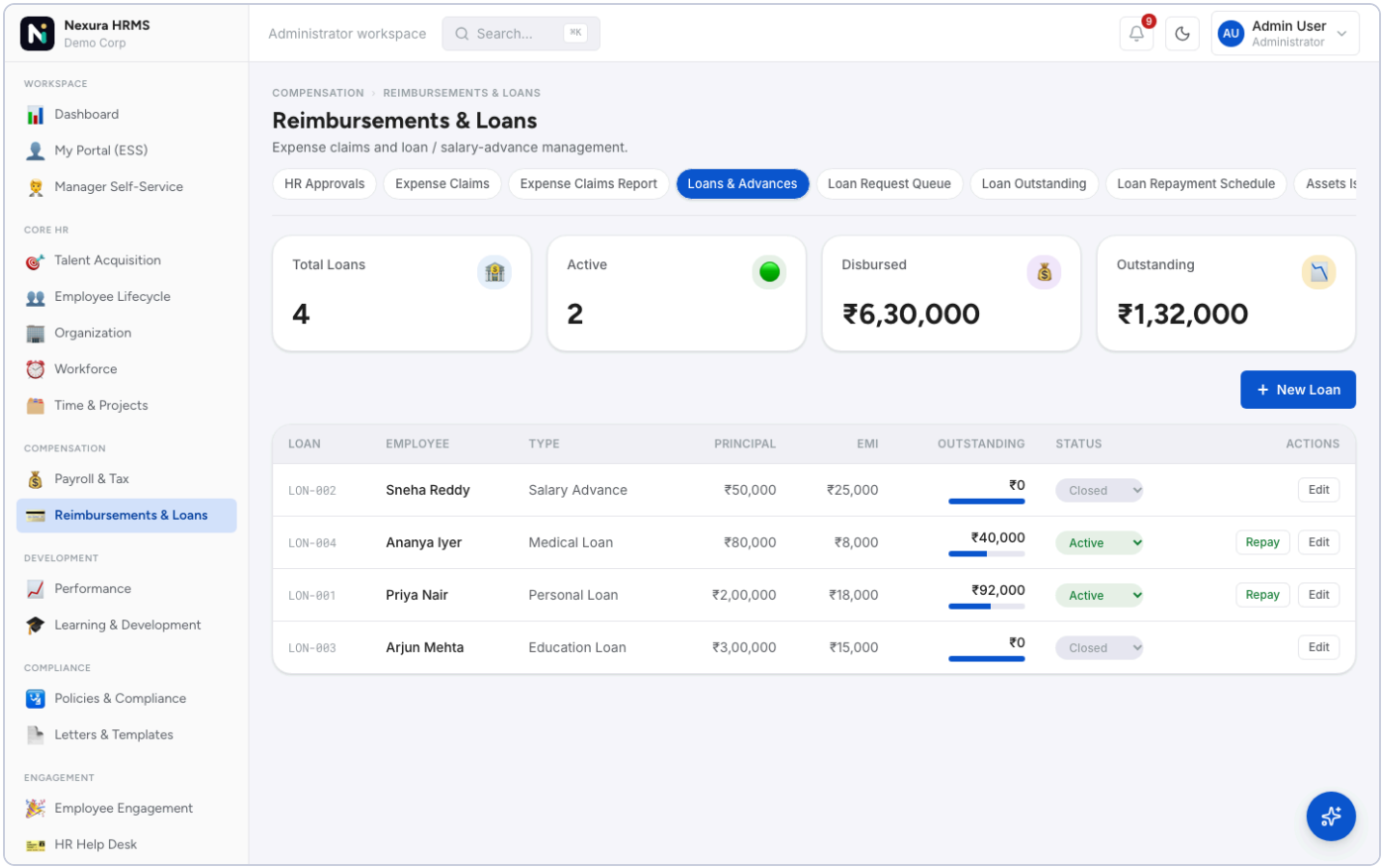
- **Who can use it:** Admin and HR (all employees). Managers can also open this page from its web address; they see their direct reports' claims and their own. Only Admin and HR can **Mark Reimbursed** and use **Export Excel**.
- **What it shows:** Expense claims with claimant, category, date incurred, amount and status. Statuses are Pending Manager, Pending HR, Approved, Rejected, Reimbursed and Cancelled. Cards at the top show total claims, the number awaiting approval, total claimed and total reimbursed.
- **What you can do:**
  - **+ New Claim:** file a claim for yourself, or on behalf of an employee.
    - Fields: category, amount, date incurred, receipt reference, cost centre and description.
    - Managers can file only for their direct reports.
  - **Approve** a claim at the manager stage, or **HR Approve** it at the HR stage. **Reject** is available at either stage.

        - **Cancel** a claim that's still pending.
        - **Mark Reimbursed** on a fully approved claim.
        - **Export Excel:** download a finance file for a date range.
            - Choose which claims to include: Approved + Reimbursed, Reimbursed only, Approved only, or All statuses.
- **How to (file and pay a claim):**
    1. Click **+ New Claim** and pick the **Claimant** ("Myself" or an employee).
    2. Fill in Category, Amount and Incurred On, and optionally Receipt Ref, Cost Centre and Description. Then click **Submit Claim**.
    3. The manager approves it, then HR clicks **HR Approve**.
    4. After you've paid the employee, click **Mark Reimbursed**.
- **Good to know:**
    - Claims normally go Manager → HR. If your company has set up an approval workflow, its steps apply instead.
    - Nobody can approve, reject or reimburse their own claim.
    - "Receipt Ref" is a reference number you type in. You can't attach a file here.
    - **Mark Reimbursed only records that the payment was made.** It doesn't add the amount to payroll or the bank file, so pay the employee separately.

Expense Claims Report

- **Who can use it:** Admin and HR (all employees). Managers can also open this page from its web address; they see only their direct reports.
- **What it shows:** A read-only list of claims with claim number, employee and department, category, amount, date incurred and status. A summary line gives the total value, the pending count and amount, and the reimbursed amount, with a total row at the bottom.
- **What you can do:**
    - Filter by **Status** and click **Apply**.
    - Download the list with **⬇ Excel**.
- **How to:**
    1. Choose a status (or "All statuses") and click **Apply**.
    2. Click **⬇ Excel** to download the filtered list for finance.
- **Good to know:** This page is read-only. To approve or pay a claim, use **Expense Claims**.

Loans & Advances



Loans and advances

- **Who can use it:** Admin and HR (all employees). Managers can also open this page from its web address; they see their direct reports' loans and their own, but only Admin and HR can save loans, record repayments or change status.
- **What it shows:** Employee loans and salary advances with code, employee, type, principal, EMI, outstanding balance (with a repaid-progress bar) and status. Types are Personal, Salary Advance, Education and Medical. Statuses are Active, Closed, Defaulted and On Hold. Cards show total loans, active loans, total disbursed and total outstanding.
- **What you can do:**
    - **+ New Loan:** record a loan with employee, type, status, principal, EMI, tenure and start date. Save it with **Disburse Loan**.
    - **Edit** a loan. While editing, you can also correct the Outstanding balance by hand.
    - **Repay:** record a manual repayment or lump sum. The loan closes by itself when the balance reaches zero.
    - Change the status from the drop-down in each row. It saves as soon as you pick.
- **How to (set up a salary advance):**
    1. Click **+ New Loan** and choose the Employee and Type "Salary Advance".
    2. Enter the Principal and the monthly EMI. Optionally add Tenure and a Started On date.
    3. Click **Disburse Loan**. The loan starts as Active.
- **Good to know:**
    - **EMIs are deducted automatically when payroll is processed:**
        - This applies only to Active loans whose start date is in or before the payroll month.
        - The EMI never takes net pay below zero. Anything not collected stays outstanding.

        - Set a loan to On Hold to pause deductions.
    - **Disburse Loan** only records the loan. It doesn't pay out the money, so pay the employee separately.
    - "Tenure" is a note for your reference and isn't used in any calculation.

Loan Request Queue

- **Who can use it:** Admin and HR only.
- **What it shows:** A read-only list of loan and advance requests employees have raised from their portal: employee, type, amount, EMI, age in days and status (Open, Approved, Rejected). Open requests come first, oldest first. A summary gives the number of open requests and their total value.
- **What you can do:**
    - Filter with the **All / Open / Approved / Rejected** chips.
    - Download the list with ⬇ **Excel**.
- **How to:**
    1. Click **Open** to see requests still waiting and how long each has waited.
    2. To decide a request, go to **HR Approvals** and click **Approve** or **Reject** there.
- **Good to know:** You decide requests on **HR Approvals**, not here. An approved request becomes an Active loan that starts on the approval date.

Loan Outstanding

- **Who can use it:** Admin and HR only.
- **What it shows:** A recovery report of every loan with employee and department, type, principal, amount repaid, outstanding balance, EMI and status. A summary shows the active count, the defaulted count, total principal and total outstanding.
- **What you can do:**
    - Filter by **Status** and click **Apply**.
    - Download the report with ⬇ **Excel**.
- **How to:**
    1. Choose a status, for example Defaulted, and click **Apply**.
    2. Click ⬇ **Excel** to download it for finance.
- **Good to know:** This page is read-only. "Repaid" is the principal minus the current outstanding balance, so if you correct the balance by hand on **Loans & Advances**, the repaid figure changes too.

Loan Repayment Schedule

- **Who can use it:** Admin and HR only.
- **What it shows:** For each loan: principal, EMI, outstanding balance, percentage repaid (as a progress bar), EMIs collected so far with an estimate of EMIs left, and status. The summary shows active loans, total outstanding and the total monthly EMI.
- **What you can do:**
    - Switch between **Active** and **All** loans.
    - Download the schedule with ⬇ **Excel**.

- **How to:**
    1. Open the page. Active loans are shown, largest balance first.
    2. Click **All** to include closed, defaulted and on-hold loans. Click ⬇ **Excel** to download.
- **Good to know:**
    - "EMIs left" is an estimate: outstanding ÷ EMI, rounded up.
    - "EMIs paid" counts only EMIs collected through payroll. Manual repayments recorded with **Repay** reduce the balance but aren't counted there.
    - This is a summary, not a month-by-month dated schedule.

Assets Issued

- **Who can use it:** Admin and HR. Managers can also open this page from its web address and see all company assets, but only Admin and HR can issue, edit, change condition, delete or decide requests.
- **What it shows:** All company assets issued to employees with asset tag, type, model, holder, issue date and condition. Conditions are Good, Damaged, Return Pending and Returned. Cards show assets issued, assets in good condition, assets needing attention and open requests. A second table lists employees' **Asset Requests**.
- **What you can do:**
    - ＋ **Issue Asset:** record an asset with holder, type, condition, model, asset tag and issue date.
    - **Edit** an asset, or **Delete** it (you'll be asked to confirm first).
    - Change the condition from the drop-down in each row.
    - For asset requests:
        - **Approve** or **Reject** an open request.
        - **Mark Fulfilled** on an approved request.
- **How to (issue a laptop):**
    1. Click ＋ **Issue Asset**.
    2. Choose **Assigned To**, type or pick the Type (for example Laptop), and add the Model, Asset Tag and Issued On date.
    3. Click **Issue Asset**.
- **Good to know:**
    - Approving or fulfilling a request doesn't create the asset record. Use **Issue Asset** as well.
    - Every asset must be assigned to an employee, so you can't record unassigned stock here.

Asset Register

- **Who can use it:** Admin and HR only.
- **What it shows:** A read-only list of every asset with its tag, type and model, holder, issue date and condition. A summary line counts assets in each condition.
- **What you can do:**
    - Filter by **Condition** and click **Apply**.
    - Download the register with ⬇ **Excel**.
- **How to:**

1. Choose a condition, or "All conditions", and click **Apply**.
2. Click ⬇ **Excel** to download the register for an audit.

- **Good to know:** This page is read-only. Make changes on **Assets Issued**.

Asset Recovery Register

- **Who can use it:** Admin and HR only.
- **What it shows:** Assets not yet returned, with holder, issue date, condition and a Recovery column. The Recovery column shows **held by exited staff** when the holder is no longer active (active means Active, Probation or Notice). Summary counts cover outstanding assets, return-pending assets and assets held by exited staff.
- **What you can do:**
  - Switch between **Outstanding** and **All** assets.
  - Download the register with ⬇ **Excel**.
- **How to:**
  1. Open the page and look for rows marked "held by exited staff".
  2. Follow up as part of the full and final settlement. Once the asset is back, set its condition to Returned on **Assets Issued**.
- **Good to know:** This page is read-only. "Outstanding" means any condition other than Returned.

Asset Condition Register

- **Who can use it:** Admin and HR only.
- **What it shows:** Every asset with its holder, issue date and last recorded condition. Damaged assets come first, then Return Pending, Good and Returned. The summary counts damaged and return-pending assets.
- **What you can do:**
  - Filter with the **All / Good / Damaged / Return pending / Returned** chips.
  - Download the register with ⬇ **Excel**.
- **How to:**
  1. Click **Damaged** or **Return pending** to see the assets that need follow-up.
  2. Click ⬇ **Excel** to download the list.
- **Good to know:** This page is read-only. The condition is whatever HR last set on **Assets Issued**; no condition history is kept.

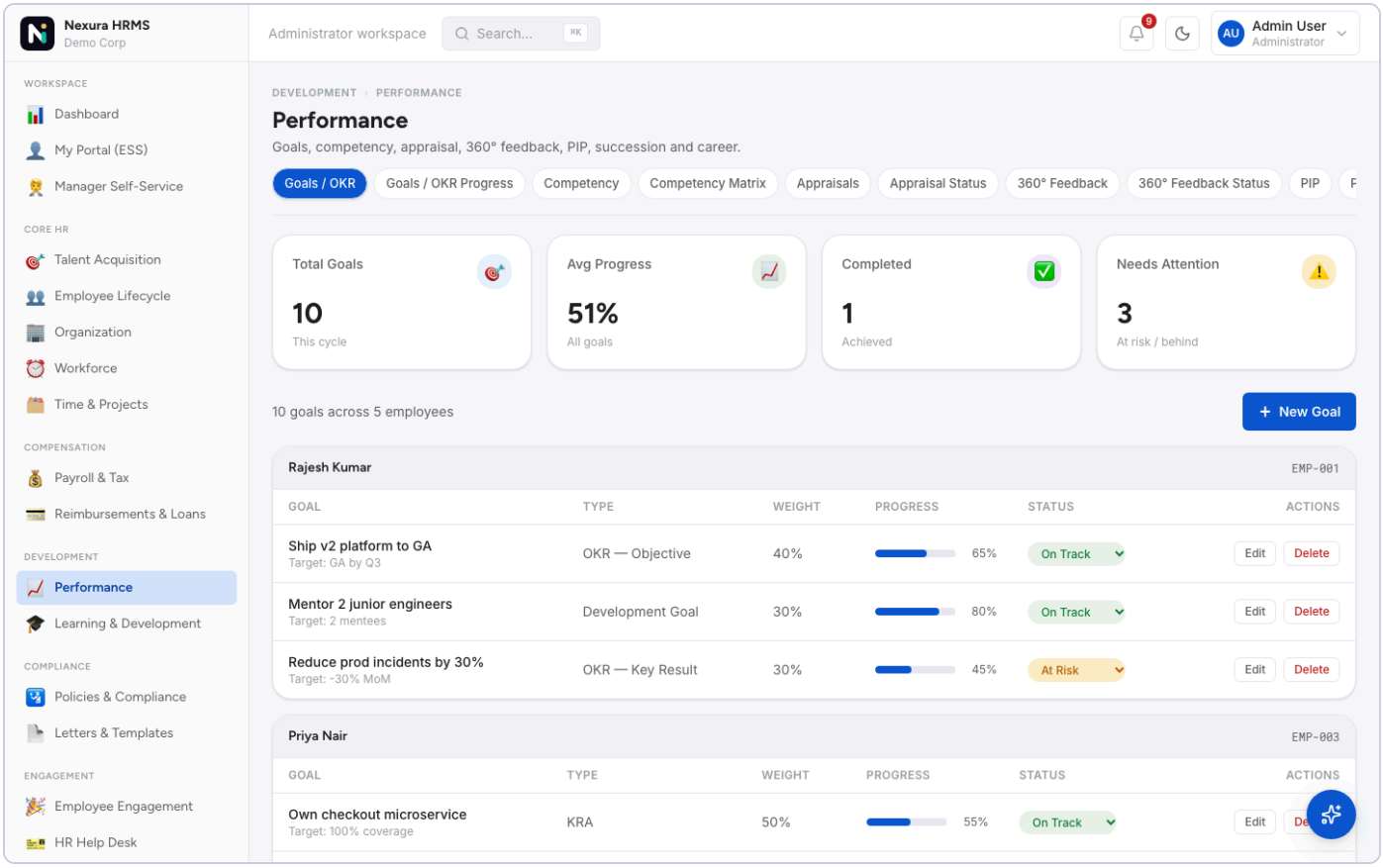
DEVELOPMENT

Performance

Set goals, assess competencies, run appraisals and 360° feedback, manage improvement plans (PIPs), and plan succession and career paths. This module is in the menu for **Admin, HR and Managers**. Employees don't see it; they take part through **My Portal** → **Performance** (update their own goals and submit their self-rating) and **My Portal** → **360° Feedback** (submit reviews).

How manager access works in this module: on Goals, Competency (assessments), Appraisals, 360° Feedback, PIP and 9-Box Grid, a Manager sees and works on records for their **direct reports** only. Admin and HR see everyone and can act on anyone **except themselves**. Nobody can edit their own goals, appraisal, PIP or 360° record from these pages. If you try to save a record you aren't allowed to change, the form shows: "You can only act on your direct reports' records, and never your own." The report pages (the "Progress", "Status", "Tracker" and "Log" pages) also show Managers only their direct reports. Succession and Career Path are company-wide.

Goals / OKR



Goals / OKR

- **Who can use it:** Admin, HR, Manager. Managers see and change only their direct reports' goals.
- **What it shows:** Goals grouped by employee. Each goal shows its type, weight, a progress bar and status. Cards at the top show Total Goals, Avg Progress, Completed and Needs Attention (goals At Risk or Behind).
- **What you can do:**
    - **+ New Goal**: pick the employee and enter Goal Title, Type (OKR — Objective, OKR — Key Result, KRA, Development Goal), Period, Weight (%), Progress (%), Target, Reviewer and Status.
    - **Edit** a goal.
    - Change the status from the Status drop-down in the row. It saves as soon as you pick. Choosing **Completed** sets progress to 100%.
    - **Delete** a goal. You'll be asked to confirm first.
- **How to: set a goal**

1. Click **+ New Goal**.
2. Choose the **Employee**, then enter the **Goal Title** and **Type**.
3. Fill in **Weight (%)**, **Target** and **Reviewer**. The period is pre-filled as "FY 2026-27"; change it if you need to.
4. Click **Create**.

- **Good to know:**
  - Progress is a number someone types in; it isn't calculated.
  - Employees can update their own progress and status from **My Portal** → **Performance**.
  - Weights aren't checked to add up to 100%, so check them yourself.

Goals / OKR Progress

- **Who can use it:** Admin, HR, Manager. Managers see only their direct reports.
- **What it shows:** A read-only summary for one goal period. For each employee you see the number of goals, how many are completed, how many need attention (At Risk or Behind), and an overall progress bar. The bar is green at 70% or more, amber at 40–69%, and red below 40%.
- **What you can do:**
  - Switch period with the period buttons at the top. The latest period is selected when you open the page.
  - Download the report with **⬇ Excel**.
- **Good to know:** Overall progress is weighted by each goal's weight. If an employee's goals have no weights, a simple average is used instead. This page is view-only; edit goals on **Goals / OKR**.

Competency

- **Who can use it:** Admin, HR, Manager. Managers see and record assessments only for their direct reports. Only Admin and HR can add, edit or delete competencies in the framework.
- **What it shows:** Two sections:
  - **Competency Framework:** the list of competencies, each with a code, name, category and maximum level.
  - **Assessments:** each employee's current level against the level required, marked "On Target" or "Gap −n". Cards at the top show Competencies, Assessments, At / Above Target and Gaps to Close.
- **What you can do:**
  - **+ Add Competency** (Admin and HR): enter Code (for example LEAD-01), Name, Category (Core, Leadership, Functional, Technical, Behavioural), Description and Max Level (1–10, default 5).
  - **Edit** or **Delete** a competency (Admin and HR).
  - **+ Record Assessment**: pick the employee and competency, then enter Current Level, Required Level and Assessed On.
  - **Edit** or **Delete** an assessment.
  - You'll be asked to confirm before anything is deleted.
- **How to: record an assessment**
  1. Click **+ Record Assessment**.

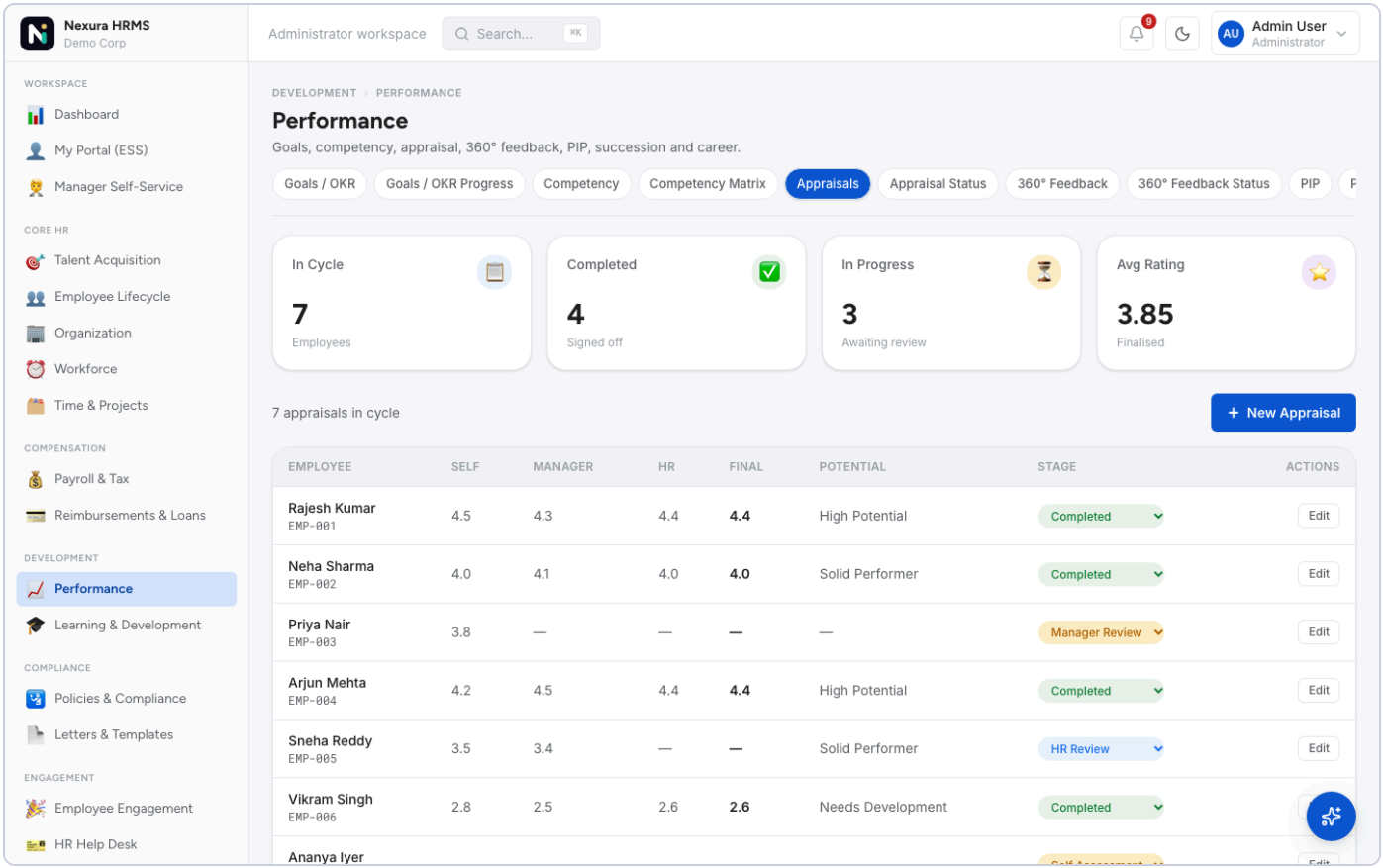
2. Choose the **Employee** and **Competency**.
3. Enter the **Current Level**, **Required Level** and the **Assessed On** date.
4. Save.

- **Good to know:** If you enter a level above the competency's maximum, it's lowered to the maximum. Levels are entered by the assessor, not calculated.

Competency Matrix

- **Who can use it:** Admin, HR, Manager. Managers see only their direct reports.
- **What it shows:** A read-only summary for each employee:
  - how many competencies have been assessed
  - how many meet the required level, and how many fall short ("gaps")
  - the average size of the gap
  - the met rate.
- **What you can do:**
  - Filter by category: All, Core, Leadership, Functional, Technical or Behavioural.
  - Download the report with ⬇ **Excel**.
- **Good to know:** A gap means the current level is below the required level. This page is view-only; record assessments on **Competency**.

Appraisals



Appraisals

- **Who can use it:** Admin, HR, Manager. Managers see, create and change appraisals only for their direct reports. Nobody can rate their own appraisal.
- **What it shows:** One row per appraisal, with the Self, Manager, HR and Final ratings, Potential and Stage. Cards at the top show In Cycle, Completed, In Progress and Avg Rating (the average of final ratings).
- **What you can do:**
    - **+ New Appraisal**: enter the following, then save:
        - Employee and Cycle
        - Period From and Period To
        - Self, Manager, HR and Final ratings (0–5)
        - Potential (High Potential, Solid Performer, Needs Development, Underperformer)
        - Reviewer and Stage
    - **Edit** an appraisal.
    - Move the stage with the Stage drop-down in the row: Self pending → Manager pending → HR pending → Approval pending → Completed, or On hold.
- **How to: run an appraisal**
    1. Click **+ New Appraisal**, choose the **Employee**, enter the **Cycle** (for example FY 2026-27) and dates, leave the stage at Self pending, and click **Create**.
    2. The employee enters a self-rating in **My Portal** → **Performance**. This moves the appraisal to Manager pending.
    3. Click **Edit** to add the Manager, HR and **Final Rating** and the **Potential**. Use the Stage drop-down to move it on until it's **Completed**.
- **Good to know:**
    - Apart from the employee's self-rating, the reviewer types in all ratings. The Final Rating isn't calculated from the others.
    - The stage changes only when someone changes it. The one exception is the employee's self-rating, which moves the appraisal on by itself.
    - You can't delete appraisals on this page.
    - The final rating and potential decide where the employee appears on the **9-Box Grid**.

Appraisal Status

- **Who can use it:** Admin, HR, Manager. Managers see only their direct reports.
- **What it shows:** A read-only view of one appraisal cycle. Each employee's row shows their stage, rating, potential and reviewer. The page also shows how many appraisals are completed and the average rating.
- **What you can do:**
    - Pick a **Cycle** and click **Apply**.
    - Download the report with **⬇ Excel**.
- **Good to know:** Until the Final Rating is entered, the rating shown is a stand-in: the latest available of HR, then Manager, then Self. Only appraisals at the Completed stage count as completed.

360° Feedback

- **Who can use it:** Admin, HR, Manager. Managers see, invite reviewers for and change only their direct reports' 360° records.
- **What it shows:** Reviewers grouped by the employee being reviewed. Each reviewer row shows the relationship, rating, submitted date and status. Cards at the top show Reviewers, Subjects, Response Rate and Awaiting.
- **What you can do:**
    - **+ Invite Reviewer**: enter the following, then click **Invite**:
        - Subject Employee and Reviewer Name
        - Reviewer Login (optional)
        - Relationship (Self, Manager, Peer, Direct Report, Skip Level, External)
        - Cycle
        - Overall Rating (0–5), Status and Submitted On
    - **Edit** a reviewer row.
    - Change the status in the row (Invited, In Progress, Submitted, Declined).
    - **Remove** a reviewer. You'll be asked to confirm first.
- **How to: set up a 360° review**
    1. Click **+ Invite Reviewer**.
    2. Choose the **Subject Employee**, then type the **Reviewer Name** and **Cycle**.
    3. If the reviewer has a Nexura login, pick it under **Reviewer Login**. They can then submit or decline from **My Portal → 360° Feedback**. For someone without a login, leave it as "None (offline reviewer)" and type in their rating yourself later.
    4. Click **Invite**. Repeat for each reviewer.
- **Good to know: Invite** creates the reviewer record but doesn't send an email, so let the reviewer know yourself. Each reviewer gives one overall rating out of 5; there's no question-by-question form.

360° Feedback Status

- **Who can use it:** Admin, HR, Manager. Managers see only their direct reports.
- **What it shows:** A read-only summary for one cycle. For each employee being reviewed, you see how many reviewers were invited, submitted and declined, the completion rate, and the average submitted rating.
- **What you can do:**
    - Switch cycle with the cycle buttons. The latest cycle is selected when you open the page.
    - Download the report with **⬇ Excel**.
- **Good to know:** Completion is submitted ÷ invited. A reviewer who declines still counts as invited, so completion can't reach 100% once someone declines. The average includes only reviewers who submitted a rating.

PIP

- **Who can use it:** Admin, HR, Manager. Managers see, create and change PIPs only for their direct reports. Nobody can open or close their own PIP.
- **What it shows:** A card for each Performance Improvement Plan, showing the manager, HR partner, start and end dates, duration, trigger reason, up to two improvement goals (with metric and target) and

the status.

- **What you can do:**
    - **＋ New PIP**: enter the following, then click **Create**:
        - Employee, Manager and HR Partner
        - Start Date and Duration (days, default 30)
        - End Date (optional)
        - Trigger Reason and Status
        - Improvement Goal 1 and 2 (title, metric, target)
    - **Edit** a PIP.
    - Change the status on the card: Draft, Active, On Track, At Risk, Improved, Exited, Extended.
    - **Delete** a PIP. You'll be asked to confirm first.
- **How to: start a PIP**
    1. Click **＋ New PIP**.
    2. Choose the **Employee**. Fill in Manager, HR Partner, **Start Date** and **Duration (days)**. Leave End Date blank and it's worked out from the duration.
    3. Enter the **Trigger Reason** and at least one improvement goal.
    4. Click **Create**. When the plan begins, change the status from Draft to Active.
- **Good to know:**
    - You type in the Manager and HR Partner names; they aren't picked from a list.
    - You can also start a draft PIP from the **9-Box Grid**.
    - The employee can see their PIP in **My Portal** → **My PIP**.

PIP Tracker

- **Who can use it:** Admin, HR, Manager. Managers see only their direct reports.
- **What it shows:** A read-only list of PIPs with the reason, period, days left and status. Plans whose end date has passed while still open are marked overdue.
- **What you can do:**
    - Switch between **Open** (shown first) and **All**, which includes closed plans.
    - Download the list with **⬇ Excel**.
- **Good to know:**
    - **Open** covers Draft, Active, On Track, At Risk and Extended.
    - **Improved** and **Exited** count as closed.
    - This page is view-only; edit plans on **PIP**.

Succession

- **Who can use it:** Admin, HR, Manager. Succession plans are company-wide: any of these roles can add, edit or delete any plan, not only for their own team.
- **What it shows:** One row per key role, with the role, incumbent, criticality, risk of losing the incumbent, and up to two successors with their readiness. Cards at the top show Critical Roles, High Flight-Risk, Ready-Now Cover and No Successor.
- **What you can do:**

    - **+ Add Plan**: enter the following, then click **Add**:
        - Role Title and Incumbent
        - Criticality (Business Critical, Key Role, Important)
        - Risk of Loss (Low, Medium, High)
        - Successor 1 and Successor 2, each with a readiness (Ready Now, Ready 1–2 yrs, Ready 3–5 yrs, Emergency Only)
        - Notes
    - **Edit** a plan, or **Delete** it (you'll be asked to confirm first).
- **How to: add a succession plan**
    1. Click **+ Add Plan**.
    2. Enter the **Role Title** and **Incumbent**, then set **Criticality** and **Risk of Loss**.
    3. Name up to two successors and set each one's readiness.
    4. Click **Add**.
- **Good to know:** You type in the incumbent and successor names; they aren't linked to employee records, so spell them the same way each time.

Succession Coverage

- **Who can use it:** Admin and HR only.
- **What it shows:** A read-only list of key roles with risk of loss, the named successors, and whether each role is "covered". A role is covered when at least one successor is Ready Now; otherwise it's a gap. The highest-risk roles come first.
- **What you can do:**
    - Filter by **All**, **High risk**, **Medium risk** or **Low risk**.
    - Download the list with **⬇ Excel**.
- **Good to know:** This page is view-only; edit plans on **Succession**.

9-Box Grid

- **Who can use it:** Admin, HR, Manager. Managers see and act on only their direct reports.
- **What it shows:** Employees placed on a 3×3 grid of performance (across) and potential (up), based on their appraisals. The nine boxes are:

Potential	Low performance	Medium performance	High performance
High	Enigma	Growth Employee	Future Leader
Medium	Dilemma	Core Player	High Impact
Low	Underperformer	Effective	Trusted Pro

It also shows how many employees are still waiting for an appraisal.

- **What you can do:** Click an employee's name to open **Quick actions**:
    - **Start PIP**: creates a 30-day draft PIP.
    - **Open Cycle**: starts a 360° cycle by adding a Self reviewer row.
    - **Add Goal**: adds a development goal.

- **How to: act on a calibration result**
    1. Click the employee's name in their box.
    2. Choose **Start PIP**, **Open Cycle** (change the cycle name first if needed) or **Add Goal** (type a goal title first).
    3. Finish the new record on the **PIP**, **360° Feedback** or **Goals / OKR** page.
- **Good to know:**
    - Placement uses only the appraisal's **Final Rating** and **Potential**. Employees missing either aren't placed.
    - Final rating bands: below 3 is Low, 3 to under 4 is Medium, and 4 or more is High.
    - Potential bands: Underperformer and Needs Development are Low, Solid Performer is Medium, and High Potential is High.
    - The grid uses every appraisal on record, from all cycles, so someone with appraisals in more than one cycle can appear more than once.
    - Goals added here always get the period "FY 2026-27".

Career Path

- **Who can use it:** Admin, HR, Manager. Career paths are company-wide, and all three roles can add, edit and delete them.
- **What it shows:** Role-progression steps grouped by track, for example "Software Engineer → Senior Software Engineer". Each step shows the typical years in role and key competencies. Cards at the top show Career Paths, Tracks, Avg Time in Role and Mgmt Ladder Steps.
- **What you can do:**
    - **＋ New Path**: enter From Role, To Role, Track, Typical Years in Role and Key Competencies, then click **Create Path**.
    - **Edit** a path, or **Delete** it (you'll be asked to confirm first).
- **How to: add a progression step**
    1. Click **＋ New Path**.
    2. Enter the **From Role**, **To Role** and **Track** (for example Individual Contributor or Management).
    3. Optionally add **Typical Years in Role** and **Key Competencies**.
    4. Click **Create Path**. A code (CP-001, CP-002 …) is given automatically.
- **Good to know:**
    - You type the Track name, so spell it the same way each time; otherwise it shows as a separate track.
    - The "Mgmt Ladder Steps" card counts only paths on a track named exactly "Management".
    - Paths are a reference catalogue; they aren't linked to individual employees.

Career Path Catalog

- **Who can use it:** Admin and HR only.
- **What it shows:** A read-only list of every progression path with its track, minimum years and key competencies. It helps you spot paths that are missing competency details.
- **What you can do:**

    - Filter by track (the options are the tracks currently in use).
    - Download the list with ⬇ **Excel**.
- **Good to know:** This page is view-only; edit paths on **Career Path**.

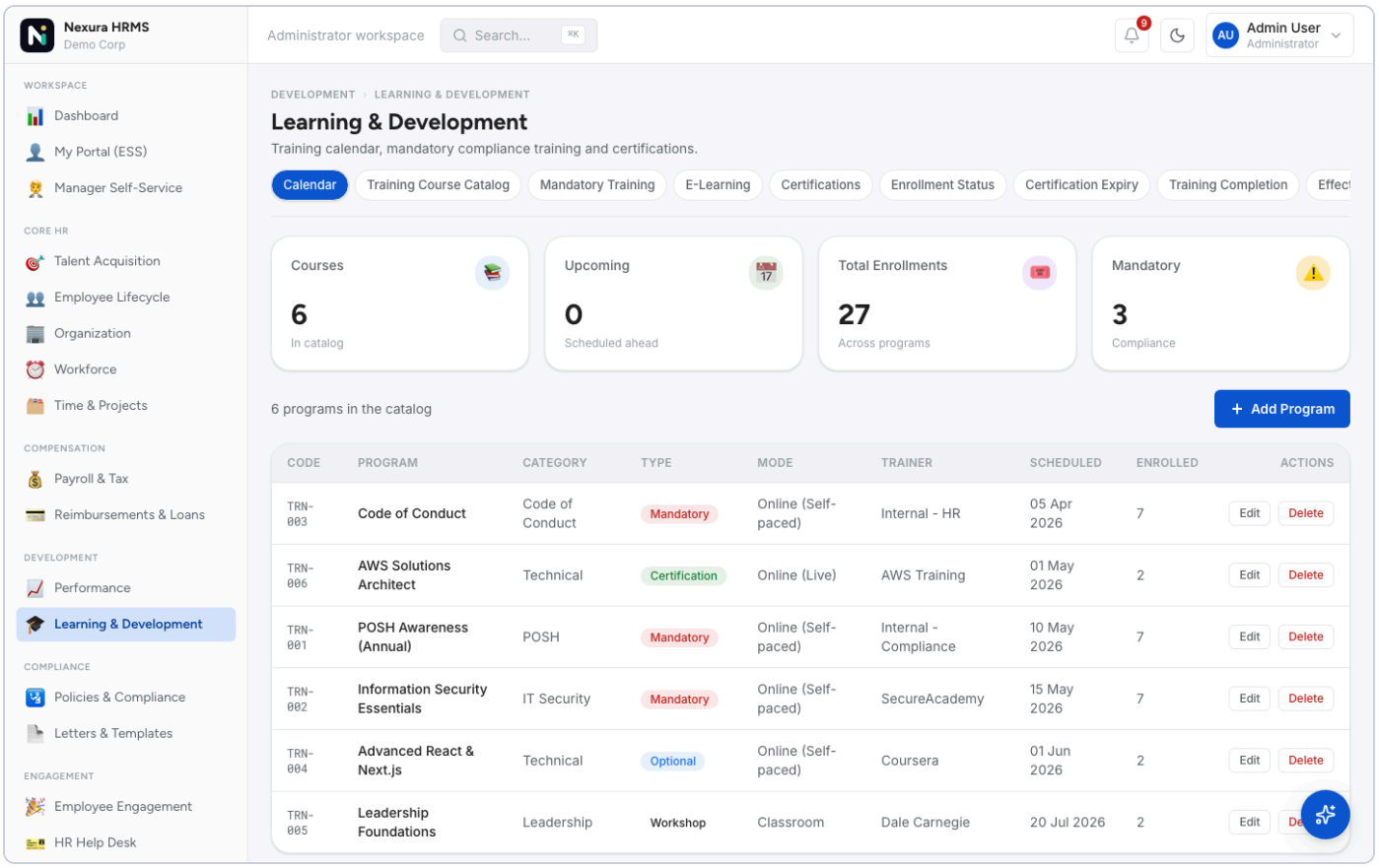
1-on-1 Meeting Log

- **Who can use it:** Admin, HR, Manager. Managers see only their direct reports.
- **What it shows:** A read-only summary for each employee: how many 1-on-1s were held, the last completed meeting, the next scheduled one, and a status. An employee is marked **Overdue** when both of these are true:
    - It's been more than 30 days since their last completed 1-on-1, or they've never had one.
    - Nothing is scheduled ahead.
- **What you can do:**
    - Switch between **All reports** and **Overdue**.
    - Download the report with ⬇ **Excel**.
- **Good to know:** You don't schedule or record meetings here. Managers do that on **1-on-1 Meetings** (URL: /mss-1on1) in Manager Self-Service. This page reports on those meetings.

Learning & Development

Plan training programmes, track who is enrolled and who has completed them, record certifications and collect feedback on how useful the training was. The module is in everyone's menu (Admin, HR, Manager, Employee), but each role sees only the pages it can open. Employees see **Calendar**, **E-Learning** and **Certifications** without the Add, Edit and Delete buttons, and enrol or update their progress from **My Portal** → **Learning**.

Calendar



Training calendar

- **Who can use it:** Everyone. Only Admin, HR and Managers can add, edit or delete programmes; Employees see the list without those buttons.
- **What it shows:** Every training programme in the catalogue, earliest date first: code, title, category, type (Mandatory / Optional / Workshop / Certification), mode, trainer, scheduled date and number enrolled. Summary cards show the total number of courses, how many are upcoming, total enrolments and how many are mandatory. Employees see a note pointing them to **My Portal** → **Learning** to enrol or update their progress.
- **What you can do:**
    - Add a programme (**+ Add Program**).
    - Edit a programme (**Edit**).
    - Delete a programme (**Delete**). You'll be asked to confirm first, and told how many enrolments will be removed with it.
- **How to: add a training programme**
    1. Click **+ Add Program**.
    2. Fill in **Code**, **Category** (for example POSH, IT Security or Leadership) and **Title**. These three are required.
    3. Choose a **Type** and a **Mode** (Online (Self), Online (Live), Classroom, On the Job or Blended). If you like, fill in **Trainer**, **Duration**, **Scheduled Date** and **Validity (months, 0 = one-time)**.
    4. Click **Add**.
- **Good to know:**
    - Each course code can be used only once.

    - Despite its name, this page is a list, not a calendar view.
    - **Validity** sets how long a completion lasts. When someone completes the course and no **Expires On** date is entered, the expiry is filled in as the completion date plus the validity months. Use 0 for one-time training that doesn't expire.

Training Course Catalog

- **Who can use it:** Admin and HR only.
- **What it shows:** A read-only list of the course library. Mandatory courses come first, then Certification, Workshop and Optional, each sorted by code. Each row shows title, code, trainer, duration, validity, category, type, mode and number of enrolments. A summary line gives the course count, how many are mandatory and the total enrolments.
- **What you can do:**
    - Filter by type: **All**, **Mandatory**, **Optional**, **Workshop**, **Certification**.
    - Download the list, with your filter applied, as a spreadsheet (⬇ **Excel**).
- **How to: export the mandatory courses**
    1. Click **Mandatory**.
    2. Click ⬇ **Excel**.
- **Good to know:** This page is view-only. To add or change a course, use **Calendar**.

Mandatory Training

- **Who can use it:** Admin, HR and Managers. Managers see only their direct reports.
- **What it shows:** A grid with employees down the side and every Mandatory course across the top. Each cell shows a symbol: ✓ Completed, ◐ In Progress, ○ Enrolled, ✗ Overdue (expired or missed), or — Not assigned. Summary cards show the compliance % (company-wide for Admin and HR, your team for Managers), the number of mandatory programmes, the number of assigned records and the number overdue.
- **What you can do:** View only. There are no buttons on this page.
- **How to: check who still has to complete mandatory training**
    1. Open the page and find the course column (hover over the code to see the full title).
    2. Look for —, ○, ◐ or ✗ in that column. To act on someone, enrol them or update their status on **E-Learning** or **Certifications**.
- **Good to know:** Compliance % = completed ÷ (number of employees × number of mandatory courses), so employees who were never enrolled count against it.

E-Learning

- **Who can use it:** Everyone. Only Admin, HR and Managers can enrol, edit, remove or change status. A Manager can do this only for their direct reports, and nobody can do it for their own record. Employees see only their own enrolments, without the buttons, and update their progress from **My Portal** → **Learning**.
- **What it shows:** The online courses (Online Self-paced and Online Live). Each course appears as a card with its trainer, duration and completion %, followed by its learners with their code, score and

status. Summary cards show the number of online courses, learners in progress, learners who have completed and total enrolments.

- **What you can do:**
    - Enrol a learner (**+ Enroll Learner**).
    - Change a learner's status from the drop-down on their row. The change saves as soon as you pick.
    - Edit an enrolment (**Edit**): score, dates, certificate reference and expiry.
    - Remove an enrolment (**Remove**). You'll be asked to confirm first.
- **How to: enrol an employee in an online course**
    1. Click **+ Enroll Learner**.
    2. Choose the **Course** and the **Learner**. Set **Status** if needed and, optionally, **Score**, **Enrolled On**, **Completed On**, **Certificate Ref** and **Expires On**.
    3. Click **Enroll**.
- **How to: mark a learner as completed**
    1. In the learner's row, choose **Completed** from the status drop-down. The completion date is set to today if it was blank.
- **Good to know:**
    - A learner can be enrolled in a given course only once.
    - Admin, HR and Managers see every employee's enrolments on this page.
    - If you leave **Expires On** blank, it's filled in when the learner completes the course: the completion date plus the course's validity months. You can still type your own date.

Certifications

- **Who can use it:** Everyone. Only Admin, HR and Managers can record, edit or delete certifications. A Manager can do this only for their direct reports, and nobody can do it for their own record. Employees see the page without these buttons.
- **What it shows:** Every completed enrolment that has a certificate reference: employee, certification, category, reference, score, completion date, expiry date and a validity badge (Valid, Expiring soon (within 2 months), Expired or No expiry). Where the expiry comes from the course validity rather than a typed date, it's marked "(from course validity)". Summary cards show the number earned, expiring soon, expired and the number of certified employees.
- **What you can do:**
    - Record a certification (**+ Record Certification**).
    - Edit a certification (**Edit**).
    - Delete a certification (**Delete**). This removes the whole enrolment record, and you'll be asked to confirm first.
- **How to: record a certificate an employee has earned**
    1. Click **+ Record Certification**.
    2. Choose the **Course / Certification** and the **Employee**, and enter the **Certificate Reference**. All three are required.
    3. Optionally enter **Score**, **Completed On** and **Expires On**, then click **Record**.
- **Good to know:**

    - Saving here always marks the enrolment Completed.
    - If the employee is already enrolled in that course, add the certificate reference with **Edit** on **E-Learning** instead, because a second record for the same course is refused.
    - If you leave **Expires On** blank, it's filled in as the completion date plus the course's validity months.
    - Employees see only their own certificates; Admin, HR and Managers see everyone's.

Enrollment Status

- **Who can use it:** Admin and HR only.
- **What it shows:** One row per course with enrolments: total enrolled, completed, in progress (Enrolled, Scheduled and In Progress together), lapsed (Expired, Missed and Cancelled together) and a colour-coded completion % bar. The bar is green at 80% or more, amber at 50% or more and red below 50%. A summary line gives the overall completion rate.
- **What you can do:**
    - Filter with **All**, **In progress**, **Completed** or **Lapsed**. Each shows only courses with at least one enrolment in that group.
    - Download the report as a spreadsheet (⬇ **Excel**).
- **How to: find courses with people who have lapsed**
    1. Click **Lapsed**.
    2. Review the red counts in the Lapsed column, then click ⬇ **Excel** if you want to share the list.
- **Good to know:** This page is read-only. Completion = completed ÷ all enrolments for that course.

Certification Expiry

- **Who can use it:** Admin, HR and Managers. Managers see only their direct reports.
- **What it shows:** Every training enrolment with an expiry date, soonest first: course, employee and department, completion date, expiry date, days left (or "days ago" if already expired) and a status of Expired, Expiring ≤60d or Valid.
- **What you can do:**
    - Choose **Show** (All with expiry, Expired, Expiring ≤60d or Valid) and click **Apply**.
    - Download the list as a spreadsheet (⬇ **Excel**). The download includes the same expiry dates as the page.
- **How to: list refresher training due in the next two months**
    1. Under **Show**, choose **Expiring ≤60d** and click **Apply**.
    2. Click ⬇ **Excel** to share the list with managers.
- **Good to know:**
    - This page is read-only.
    - The expiry is the **Expires On** date saved on the enrolment. For older completed records where that was left blank, the page works it out as the completion date plus the course's validity months and marks it "derived".
    - Courses with validity 0 (one-time) and no typed expiry don't appear here.
    - Employee document expiries aren't covered by this report.

Training Completion

- **Who can use it:** Admin, HR and Managers. Managers see only their direct reports.
- **What it shows:** One row per enrolment: employee and department, course and type, status, enrolled date and completed date. A summary line shows the completion % and the number of overdue mandatory items. An item is overdue when the course is mandatory, the enrolment isn't completed and its expiry date has passed. These rows carry a red "overdue" tag.
- **What you can do:**
    - Switch between **All types** and **Mandatory**.
    - Download the list as a spreadsheet (**⬇ Excel**).
- **How to: check your team's mandatory training**
    1. Click **Mandatory**.
    2. Look for rows tagged "overdue" or not yet Completed. Click **⬇ Excel** to keep a copy.
- **Good to know:** This page is read-only. A mandatory enrolment with no expiry date is never marked overdue, so enter an **Expires On** date for training that must be finished by a deadline.

Effectiveness

- **Who can use it:** Admin, HR and Managers.
- **What it shows:** Feedback on how participants rated each programme. Each response has 1–5 star ratings for content, trainer and relevance, plus comments and the date submitted. Summary cards show the average of each rating and the "Would Recommend" %.
- **What you can do:**
    - Record a response (**+ Add Feedback**).
    - Edit a response (**Edit**).
    - Delete a response (**Delete**). You'll be asked to confirm first.
- **How to: record feedback from a training session**
    1. Click **+ Add Feedback**.
    2. Choose the **Programme** and type the **Participant** name. Both are required.
    3. Choose a **Content Rating**, **Trainer Rating** and **Relevance Rating** (each starts at 5), answer **Would Recommend?**, and optionally add **Submitted On** and **Comments**.
    4. Click **Add**.
- **Good to know:** HR or managers enter the feedback on participants' behalf, for example from paper forms; participants don't submit it themselves here. You type the participant's name, and it isn't linked to an employee record.

Training Feedback Summary

- **Who can use it:** Admin and HR only.
- **What it shows:** One row per course that has received feedback: number of responses, average content, trainer and relevance ratings, an overall score (the average of those three) and the % who would recommend it. The lowest-rated courses come first, so you can see which training needs rework. Scores are green at 4 or more, amber at 3 or more and red below 3.
- **What you can do:**

    - Filter by course category with the buttons (**All** plus each category that has feedback).
    - Download the summary as a spreadsheet (⬇ **Excel**).
- **How to: find the weakest programmes**
    1. Open the page. The rows at the top have the lowest overall scores.
    2. Optionally click a category button, then ⬇ **Excel** to share the result.
- **Good to know:** This page is read-only, and it's only as complete as the feedback entered on **Effectiveness**.

5. Compliance and Engagement

This guide covers two menu groups: **COMPLIANCE** (Policies & Compliance, Letters & Templates) and **ENGAGEMENT** (Employee Engagement, HR Help Desk).

Roles: Admin, HR, Manager and Employee.

Good to know for every page in this guide:

- **Status changes save straight away.** When you pick a new status from a drop-down in a table, the record is saved at once. You don't need to click Save.
- **You'll be asked to confirm before you delete.** When you click **Delete**, a message asks you to confirm ("This can't be undone"). Once you confirm, the record is gone for good.
- **Reference numbers are added for you.** New records get a number such as POL-0001, BGV-0001, LTR-0001 or TKT-0001.
- **Your menu shows the pages your role can open.** If you open a page's address directly without permission, you're taken back to the Dashboard. On pages that everyone can view (Recognition, Events, Wellbeing and Service Catalog), employees see the information without the **Add**, **Edit** or **Delete** buttons.
- **Report pages are for viewing only.** Most "Register", "Summary", "Tracker" and "Report" pages just show information. Use the filter chips to change what you see, and click ⬇ **Excel** to download the current view as a spreadsheet.

COMPLIANCE

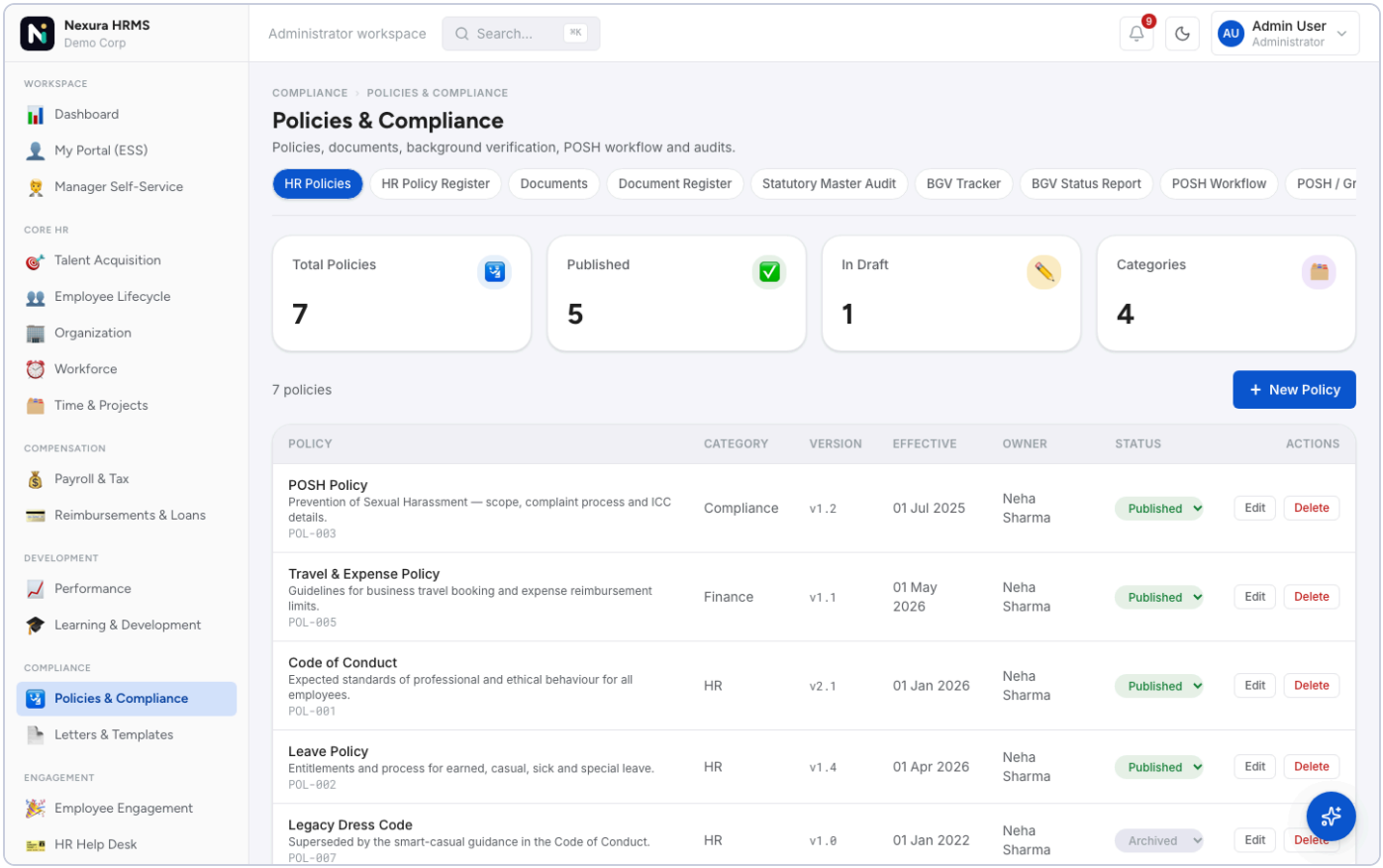
Policies & Compliance

Purpose: Keep company policies, employee documents, background checks, POSH cases, the ICC committee and audits in one place.

Who sees this module: Admin and HR.

The module also includes the data-protection pages: Privacy Centre (DPDP), Privacy Requests, Data Breach Register, Data Retention & Erasure and Sensitive Data Access Log. For these, see the chapter *Sign-in options, privacy and approvals*.

HR Policies



HR policies

- **Who can use it:** Admin, HR.
- **What it shows:** Your company's policies, each with its category, version, effective date, owner and status (Draft, Published or Archived). Cards at the top count total policies, published policies, drafts and categories.
- **What you can do:**
    - Add a policy (**+ New Policy**).
    - Edit a policy.
    - Change its status from the drop-down.
    - Delete a policy.
- **How to:** add a policy
    1. Click **+ New Policy**.
    2. Fill in **Policy Name** and **Category** (both required). Version, Effective From, Owner, Status and Summary are optional.
    3. Click **Create Policy**.
    4. When the policy is ready for staff, change its status to **Published**.
- **Good to know:**
    - You record the policy's details and a short summary here. Keep the full policy document wherever you store files today, as you can't upload it on this page.
    - Employees see only **Published** policies, on their HR Policies portal page.

HR Policy Register

- **Who can use it:** Admin, HR.
- **What it shows:** All policies, grouped by category, with version, effective date, owner and status. A summary line counts published policies and drafts.
- **What you can do:**
    - Filter by **All**, **Draft**, **Published** or **Archived**.
    - Download the list with ⬇ **Excel**.
- **Good to know:** This page is for viewing only. Make changes in **HR Policies**. A dash (—) means no version or effective date was entered.

Documents

- **Who can use it:** Admin, HR.
- **What it shows:** Employee documents, grouped by employee. Each document shows its type, name, file size, notes and upload date. Cards count total documents, employees covered, document types and the average per employee.
- **What you can do:**
    - Upload a document for an employee (⬆ **Upload Document**).
    - **Download** a file.
    - **Delete** a document.
- **How to:** upload a document
    1. Click ⬆ **Upload Document**.
    2. Choose the **Employee** and the **Document Type**: Offer Letter, Appointment Letter, PAN Card, Aadhaar Card, Educational Certificate, Experience Letter, Bank Proof, Relieving Letter or Other.
    3. Enter a **Document Name** and, if you like, **Notes**.
    4. Choose the **File** (up to 10 MB) and click **Upload**.
- **Good to know:**
    - You can't edit a document after uploading it. To replace one, delete it and upload the new file.
    - Employees upload their own files from the **My Documents** portal page.

Document Register

- **Who can use it:** Admin, HR.
- **What it shows:** One row for each employee with at least one document on file. Each row shows how many documents they have, which types, and the date of the last upload. Employees with the fewest documents come first, so gaps are easy to spot.
- **What you can do:**
    - Filter by document type (the chips list the types in use).
    - Download with ⬇ **Excel**.
- **Good to know:**
    - This page lists document details only. To open a file, go to **Documents**.
    - Employees with no documents at all don't appear here.

Statutory Master Audit

- **Who can use it:** Admin, HR.
- **What it shows:** For every current employee (Active, Probation or Notice), whether their PAN, Aadhaar, UAN and ESIC numbers are on record. Only the last 4 characters of each number are shown. A blank number shows as **missing**, and the last column counts the missing numbers for each person.
- **What you can do:**
    - Switch between **All** and **Only incomplete**.
    - Download with ⬇ **Excel**.
- **How to:** find missing IDs before a statutory filing
    1. Click **Only incomplete**.
    2. Click ⬇ **Excel** to get a working list.
    3. Add the missing numbers on each employee's record.
- **Good to know:**
    - This page is for viewing only.
    - "Present" means only that something has been entered. The page doesn't check that the number is in the right format, so do a quick visual check too.

BGV Tracker

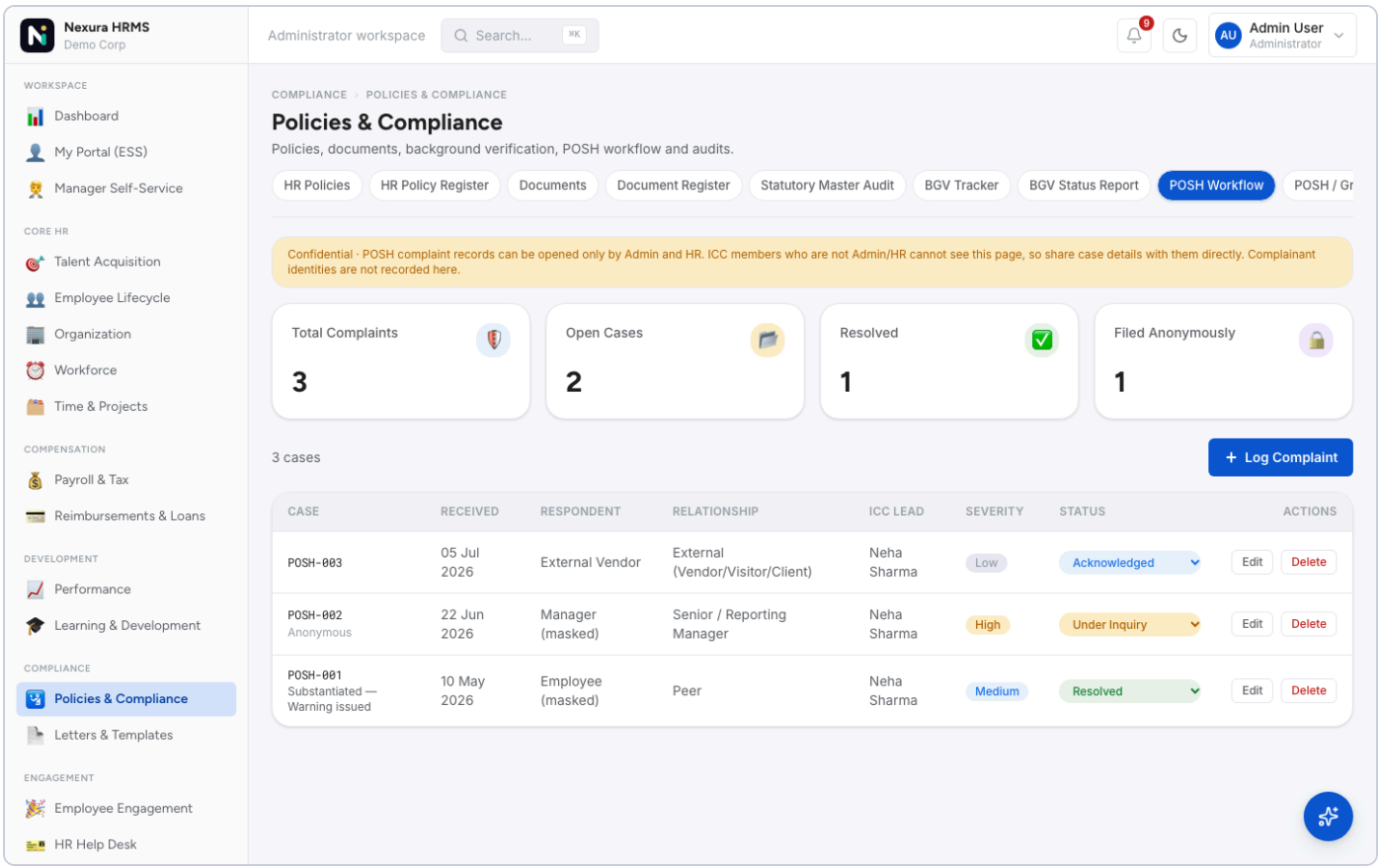
- **Who can use it:** Admin, HR.
- **What it shows:** Background verification (BGV) cases. Each case shows the subject, vendor, package, start date and overall result. Four checks are shown as marks: ID, Address (Addr), Education (Edu) and Employment (Emp). The marks mean ✓ verified, ! discrepancy, ✗ failed, … pending and — not applicable. Cards count total checks, checks in progress, verified checks and flagged checks.
- **What you can do:**
    - Start a case (**+ New Check**).
    - Edit a case.
    - Change its status from the drop-down.
    - Delete a case.
- **How to:** start and update a check
    1. Click **+ New Check**.
    2. Enter **Subject**, **Vendor** and **Package Tier** (all required).
    3. Under **Pre-hire Candidate?**, choose whether the person is a candidate or an employee.
    4. Add any dates you have, then click **Create Check**.
    5. As the vendor reports back, click **Edit** and set each **ID / Addr / Edu / Emp Check**, the **Discrepancy Severity**, the **Overall Result** and the **Actual Completion** date.
- **Good to know:**
    - You type the subject's name. It isn't linked to an employee record.
    - You enter the vendor's results yourself. They don't come in automatically.

BGV Status Report

- **Who can use it:** Admin, HR.
- **What it shows:** BGV cases with each check and the due date.

    - A case is **open** until it has an actual completion date.
    - A case is **overdue** when it's still open after its expected completion date.
    - The summary line counts open, overdue and problem cases.
- **What you can do:**
    - Switch between **Open** (the default, oldest first) and **All**.
    - Download with ⬇ **Excel**.
- **Good to know:** This page is for viewing only. Make changes in **BGV Tracker**. A case stays open until you enter an **Actual Completion** date, even if its status says Verified.

POSH Workflow



POSH workflow

- **Who can use it:** Admin, HR.
- **What it shows:** Confidential POSH (prevention of sexual harassment) complaint cases. Each case shows the received date, respondent, working relationship, ICC lead, severity, status and outcome. Cards count total cases, open cases, resolved cases and cases filed anonymously.
- **What you can do:**
    - Record a complaint (**+ Log Complaint**).
    - Edit a case.
    - Change the case status: Received → Acknowledged → Under Inquiry → Awaiting Resolution → Resolved / Closed / Withdrawn.
    - Delete a case.
- **How to:** log a complaint

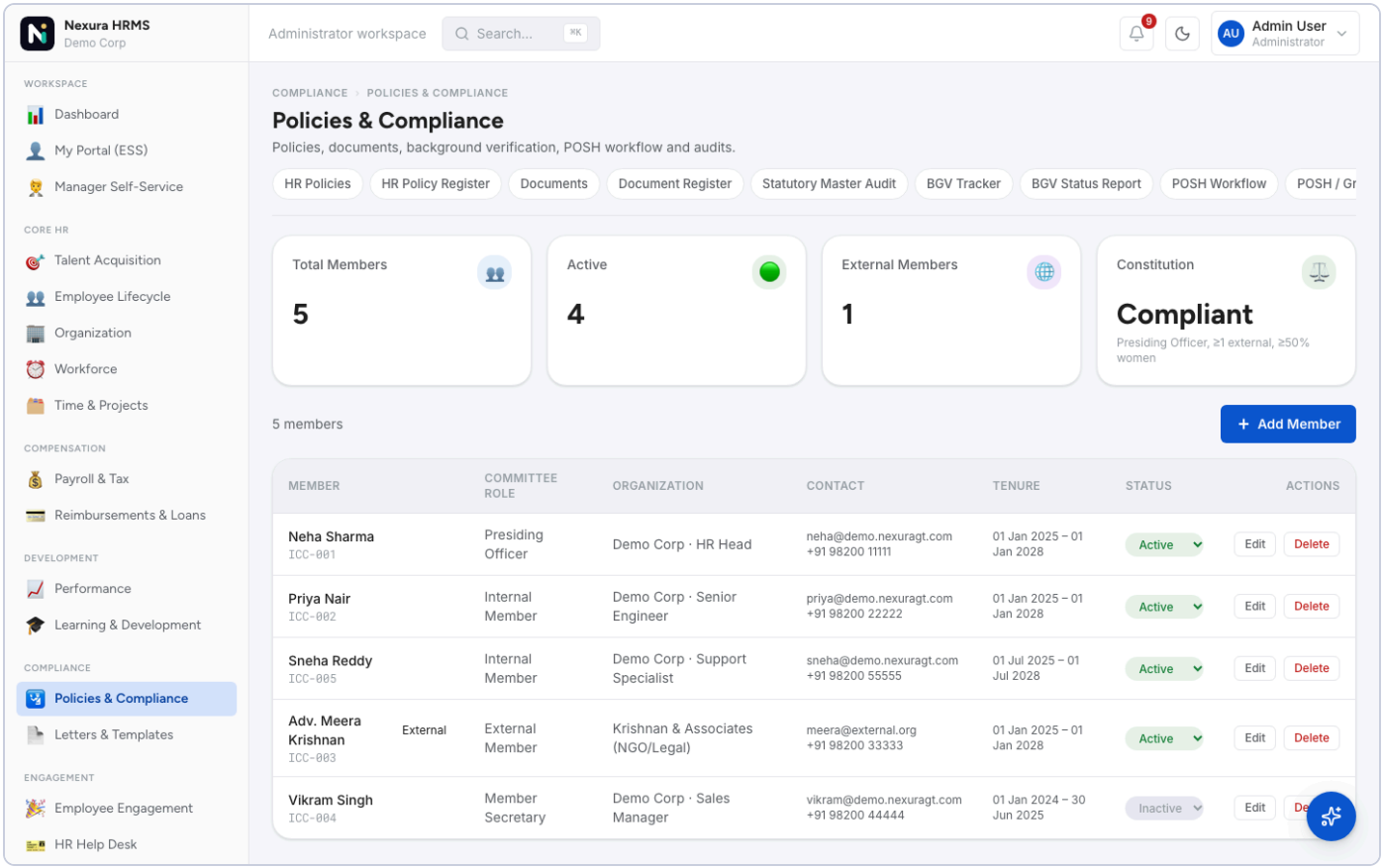
1. Click **+ Log Complaint**.
2. Enter the **Respondent Name** (required).
3. Set **Filed Anonymously?**, **Received On**, **Incident Date**, **Working Relationship**, **ICC Lead** and **Severity** (Low, Medium, High or Critical).
4. Click **Log Complaint**.
5. As the inquiry moves on, update the status and fill in the **Outcome**.

- **Good to know:**
    - HR records complaints here. Employees don't file complaints in the app. Their **POSH / Grievance** portal page shows the ICC panel and how to reach it.
    - Only Admin and HR can open POSH records, as the banner on the page says. If an ICC member isn't an Admin or HR user, share the case details with them directly.
    - Complainant identities are not recorded on this page.

POSH / Grievance Register

- **Who can use it:** Admin, HR.
- **What it shows:** A confidential register of POSH cases. Respondent names are shortened to initials (for example "A. M."). Open cases show how many days they have been open. A case open for more than **90 days** is flagged, because the POSH Act requires the inquiry to be completed within 90 days.
- **What you can do:**
    - Switch between **Open** and **All**.
    - Download with **⬇ Excel** (the file is marked confidential).
- **Good to know:** This page is for viewing only. Days open are counted from the received date. The count stops once a case is Resolved, Closed or Withdrawn.

ICC Roster



ICC roster

- **Who can use it:** Admin, HR.
- **What it shows:** Members of the Internal Complaints Committee (ICC). Each member shows their committee role (Presiding Officer, Internal Member, External Member or Member Secretary), organisation, email, phone, tenure and status. A **Constitution** card shows **Compliant** when the committee meets the POSH Act rules, or **Review** with the gap to fix.
- **What you can do:**
    - Add a member (**+ Add Member**).
    - Edit a member.
    - Switch a member between Active and Inactive.
    - Delete a member.
- **How to:** add a committee member
    1. Click **+ Add Member**.
    2. Enter the **Member Name** and choose a **Committee Role** (both required).
    3. Set **External Member?**, then add the organisation, contact details and tenure dates.
    4. Click **Add Member**.
- **Good to know:**
    - The constitution check looks at all active members and confirms three things: there is a Presiding Officer, at least one external member, and at least half the members are women.
    - Gender is taken from the matching employee record (matched by email, or by name). Members who can't be matched, often the external member, count as "gender unknown". To fix this, enter the member's email exactly as it appears on their employee record.
    - Employees see the active members on their POSH portal page.

ICC Committee Register

- **Who can use it:** Admin, HR.
- **What it shows:** The committee list, with the Presiding Officer first. Each member shows their role, whether they are internal or external, their organisation, tenure and status. The summary line shows how many members are active, external and women. It then says whether the committee is complete, or shows a "Composition gap" message that names what's missing.
- **What you can do:**
    - Filter by **All**, **Active** or **Inactive**.
    - Download with ⬇ **Excel**.
- **Good to know:** This page is for viewing only. The composition check always uses all active members, whichever filter you pick, and applies the same three rules as **ICC Roster**.

Audit Management

- **Who can use it:** Admin, HR.
- **What it shows:** Internal and statutory audits. Each audit shows its type, auditor, scheduled and completed dates, number of findings, rating and status. Cards count total audits, completed audits, overdue audits and findings logged.
- **What you can do:**
    - Add an audit (**+ Schedule Audit**).
    - Edit an audit.
    - Change its status: Planned, In Progress, Completed or Overdue.
    - Delete an audit.
- **How to:** schedule an audit
    1. Click **+ Schedule Audit**.
    2. Enter the **Audit Title** and **Type** (both required, for example Internal, Statutory or ISO).
    3. Add the auditor, scheduled date and scope.
    4. Click **Schedule Audit**.
    5. When the audit is done, click **Edit** and enter the completed date, **Findings** (a number), **Rating** and status.
- **Good to know:**
    - **Overdue** is a status you set yourself. Audits aren't marked overdue automatically when the date passes.
    - **Findings** is a count. Keep the details of each finding in your audit report.

Compliance Audit Tracker

- **Who can use it:** Admin, HR.
- **What it shows:** All audits, with Overdue first, then In Progress, Planned and Completed. The summary line counts overdue audits and open findings (findings on audits that aren't completed yet).
- **What you can do:**
    - Filter by status.
    - Download with ⬇ **Excel**.

- **Good to know:** This page is for viewing only. Make changes in **Audit Management**.

Reports & BI

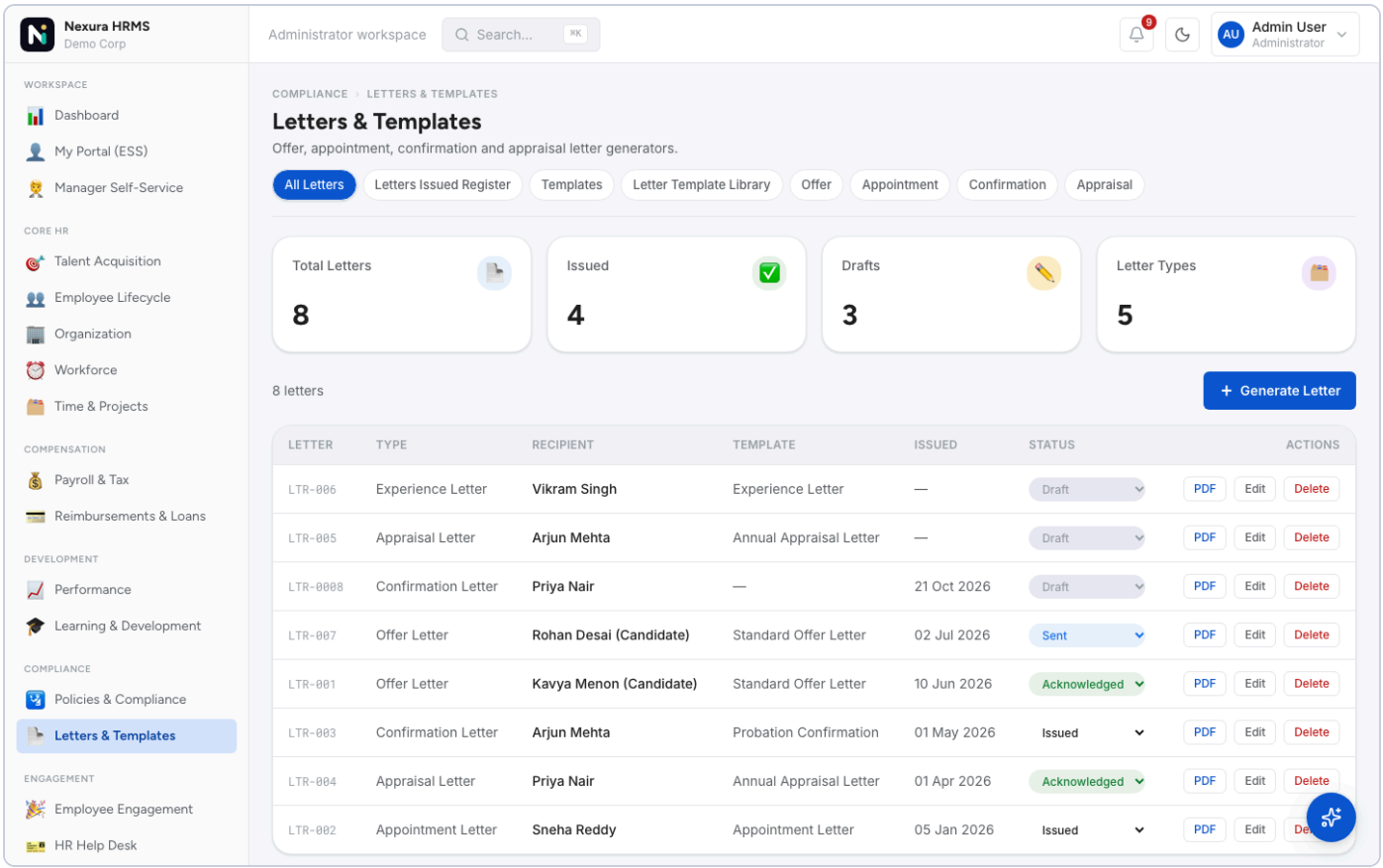
- **Who can use it:** Admin and HR. Managers can also open the page from its address, though it isn't in their menu. For Managers, people counts cover their own team, and company-wide figures show "—".
- **What it shows:** Report tiles grouped into Workforce, Recruitment, Payroll & Attendance, Compliance and Help Desk. Each tile shows a live count, such as published policies, BGV checks, overdue audits or open tickets.
- **What you can do:** Click a tile to open that report or page, such as Policy Register, Background Verification, Audit Register, Compliance Dashboard or Ticket Backlog.
- **Good to know:** This page is a starting point that links to other reports. It doesn't build custom reports.

Letters & Templates

Purpose: Write letter templates and create letters from them, such as offer, appointment, confirmation and appraisal letters. You can then download each letter as a PDF.

Who sees this module: Admin and HR.

All Letters



Letters

- **Who can use it:** Admin, HR.

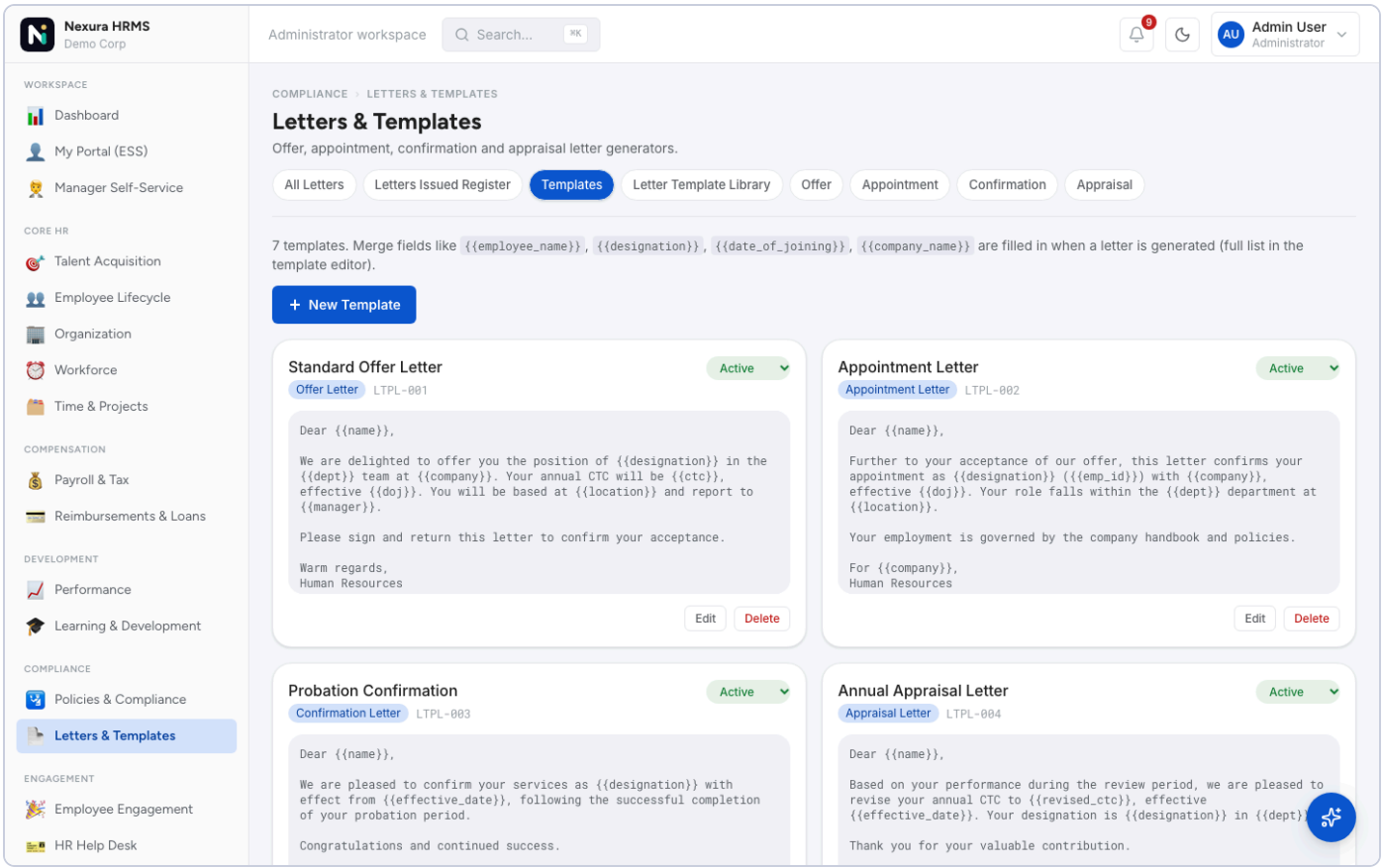
- **What it shows:** Every letter created. Each letter shows its number (LTR-0001…), type, recipient, template name, issue date and status. The statuses are Draft, Sent, Issued, Acknowledged and Returned. Cards count total letters, issued letters, drafts and letter types.
- **What you can do:**
    - Create a letter (**+ Generate Letter**).
    - Download a letter as a **PDF**.
    - **Edit** a letter.
    - Change its status from the drop-down.
    - **Delete** a letter.
- **How to:** create a letter from a template
    1. Click **+ Generate Letter**.
    2. In **Start from a template**, pick a template. This fills in **Type**, **Template Name** and **Body**, and replaces anything you've already typed. You can also choose "Write from scratch".
    3. Enter the **Recipient** (required).
    4. Choose the person under **Link to Employee**. You need to do this if the letter uses any employee fields.
    5. Set the **Issued On** date and the **Status**, and adjust the text if needed.
    6. Click **Generate Letter**.
- **Fields that fill in when you save:**
    - **Employee fields** (need **Link to Employee**):
        - `{{employee_name}}`, `{{employee_code}}`
        - `{{designation}}`, `{{department}}`, `{{location}}`
        - `{{date_of_joining}}`, `{{probation_end_date}}`
        - `{{annual_ctc}}`, `{{monthly_ctc}}` (monthly is annual ÷ 12)
        - `{{manager_name}}`
    - **Company and letter fields** (always available):
        - `{{company_name}}`, `{{company_legal_name}}`, `{{company_address}}`
        - `{{issue_date}}` (the Issued On date, or today's date if you leave it blank)
        - `{{recipient}}`
- **How to:** download the PDF
    1. Click **PDF** on the letter's row.
    2. The file downloads, named with the letter number and the recipient's name.
    3. The PDF shows the company's legal name and address, the letter number, the date, the recipient, the letter type as the subject, and the letter text.
- **Good to know:**
    - **The letter won't save if:**
        - a field name is misspelt (you'll see an "Unknown field" message);
        - the letter uses employee fields but no employee is linked; or
        - the employee or company record is missing something the letter needs, for example no manager recorded. Add the missing detail and try again.
    - **Fields are filled in once, when you save.** After that, the letter keeps its final text. If the employee's details change later, edit the letter text yourself.

- **Only Active templates** appear in the template list.
- **The app doesn't send letters for you.** Download the PDF and send it yourself. "Sent" and "Issued" are statuses you set to keep track.

Letters Issued Register

- **Who can use it:** Admin, HR.
- **What it shows:** A record of all letters, newest issue date first. Each letter shows its type, recipient, template used, issue date and status. A letter counts as **issued** once its status is Sent, Issued or Acknowledged.
- **What you can do:**
  - Filter by letter type: Offer, Appointment, Confirmation, Appraisal, Experience, Relieving, Increment or Warning.
  - Download with ⬇ **Excel**.
- **Good to know:** This page is for viewing only. To download PDFs, use **All Letters** or the letter-type pages.

Templates



Letter templates

- **Who can use it:** Admin, HR.
- **What it shows:** All letter templates as cards. Each card shows the template's name, type, number (TPL-0001…), status (Active, Draft or Archived) and full text. The hint at the top gives examples of

fields you can use, such as `{{employee_name}}`, `{{designation}}`, `{{date_of_joining}}` and `{{company_name}}`.

- **What you can do:**
    - Create a template (**+ New Template**).
    - Edit a template.
    - Change its status from the drop-down.
    - Delete a template.
- **How to:** create a reusable template
    1. Click **+ New Template**.
    2. Enter the **Template Name** and choose the **Type**.
    3. Write the **Body**. Type fields such as `{{employee_name}}` wherever details should fill in. The full list of fields appears under the text box.
    4. Keep **Status** as **Active** so the template appears in **Generate Letter**.
    5. Click **Create Template**.
- **Good to know:** Editing a template doesn't change letters already created from it.

Letter Template Library

- **Who can use it:** Admin, HR.
- **What it shows:** A catalogue of templates (name, number, type and status), with counts of active and draft templates.
- **What you can do:**
    - Filter by letter type.
    - Download with **⬇ Excel**. The file lists the catalogue details, not the template text.
- **Good to know:** This page is for viewing only. Make changes in **Templates**.

Offer

- **Who can use it:** Admin, HR.
- **What it shows:**
    - At the top, your **Offer Letter Templates**, with each template's text and status.
    - Below, a table of **Generated Offer Letters** with recipient, template, issue date and status.
- **What you can do:** Download a letter's PDF by clicking its number (for example **LTR-0003** ↓).
- **How to:** issue a new offer letter
    1. Go to **All Letters** and click **+ Generate Letter**.
    2. Pick an Offer template and follow the steps there.
    3. The new letter then appears on this page.
- **Good to know:** This page is for viewing and downloading. Create, edit or delete letters in **All Letters** and templates in **Templates**.

Appointment

- **Who can use it:** Admin, HR.

- **What it shows:** The same layout as **Offer**, for Appointment letters: Appointment Letter Templates at the top and Generated Appointment Letters below.
- **What you can do:** Download a letter's PDF by clicking its number.
- **Good to know:** This page is for viewing and downloading. Create letters in **All Letters** and templates in **Templates**.

Confirmation

- **Who can use it:** Admin, HR.
- **What it shows:** The same layout as **Offer**, for Confirmation letters (for example, confirming an employee after probation).
- **What you can do:** Download a letter's PDF by clicking its number.
- **Good to know:** This page is for viewing and downloading. Create letters in **All Letters**. The field `{{probation_end_date}}` is handy in these templates.

Appraisal

- **Who can use it:** Admin, HR.
- **What it shows:** The same layout as **Offer**, for Appraisal letters.
- **What you can do:** Download a letter's PDF by clicking its number.
- **Good to know:** This page is for viewing and downloading. Create letters in **All Letters**. The salary fields `{{annual_ctc}}` and `{{monthly_ctc}}` come from the CTC on the employee's record, so update that first if the salary has changed.

ENGAGEMENT

Employee Engagement

Purpose: Track celebrations, surveys, recognition, events, staff suggestions and wellbeing programmes.

Who sees this module: Everyone (Admin, HR, Manager and Employee). Some pages are limited to certain roles, as shown below.

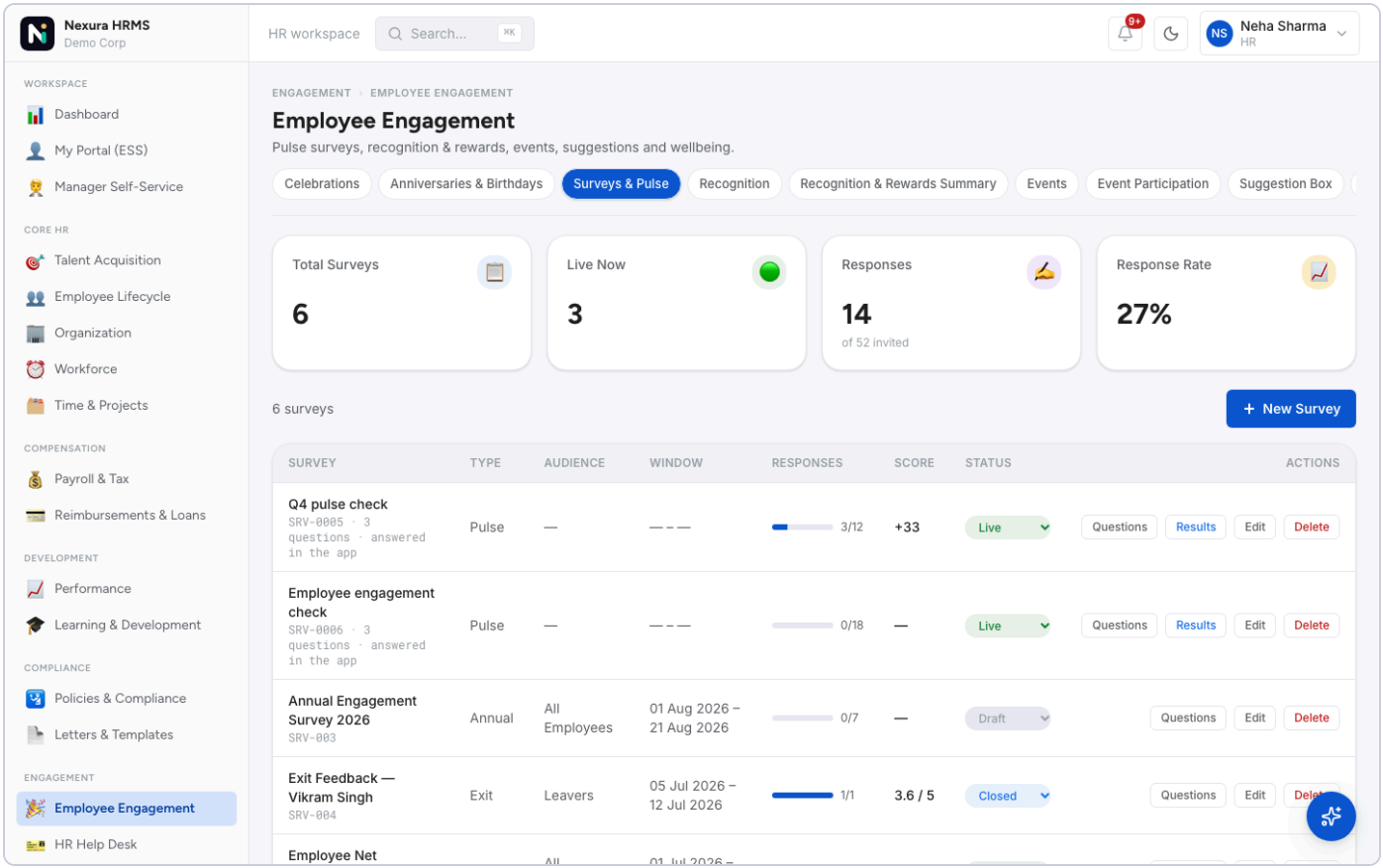
Celebrations

- **Who can use it:** Admin, HR, Manager. Managers see only their direct reports.
- **What it shows:** Birthdays and work anniversaries for **this month** and **next month**, listed by day. Birthdays show the day and month only, never the year. Anniversaries show completed years of service. Only current staff (Active, Probation or Notice) are included.
- **What you can do:** View the list.
- **Good to know:**
    - The page doesn't send wishes or messages. Use it as your list to act on.
    - People without a date of birth or joining date on their record don't appear.
    - A person's birthday isn't shown if they have turned off **Birthday on the celebrations board** in My Privacy, or if they are a former employee whose data has been erased.

Anniversaries & Birthdays

- **Who can use it:** Admin, HR, Manager. Managers see only their direct reports.
- **What it shows:** Upcoming birthdays and work anniversaries within a time window you choose, soonest first. Each row shows the date, how many days away it is ("Today", "1 day"…) and the milestone ("Turning 30" or "5 years").
- **What you can do:**
    - Set **Within (days)** (1–365, default 30).
    - Choose a **Type**: Both, Birthdays or Work anniversaries.
    - Click **Apply**.
    - Download with ⬇ **Excel**.
- **How to:** plan this quarter's celebrations
    1. Enter 90 in **Within (days)** and click **Apply**.
    2. Click ⬇ **Excel** to share the list.
- **Good to know:**
    - This page is for viewing only. Unlike **Celebrations**, it shows the age someone is turning.
    - The same birthday privacy choice applies here: people who have turned off **Birthday on the celebrations board** in My Privacy, and former employees whose data has been erased, don't appear.

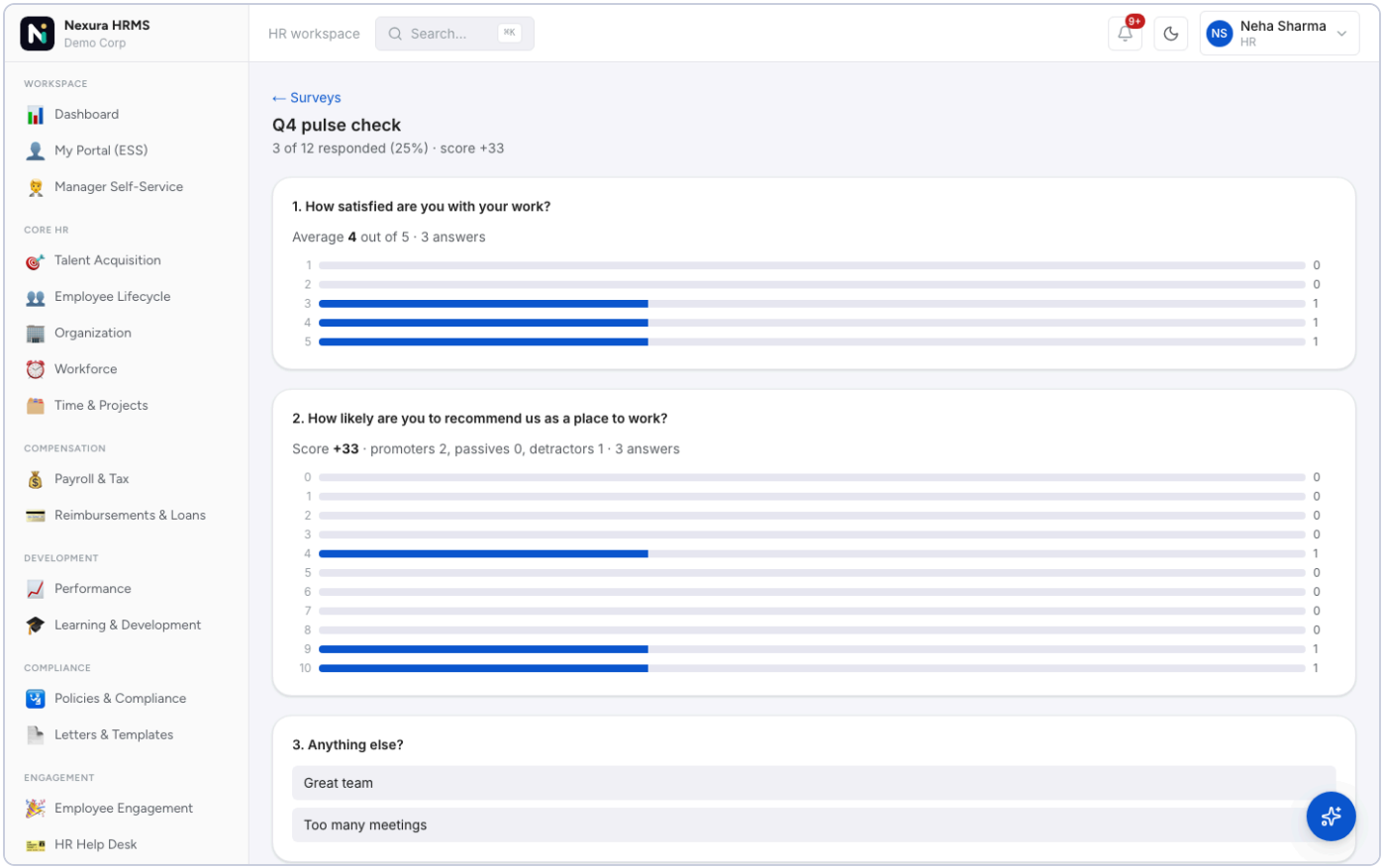
Surveys & Pulse



Surveys and pulse

- **Who can use it:** Admin, HR and Manager can see the list. Only Admin and HR can add questions, change a survey's status, edit or delete.
- **What it shows:** A list of surveys. Each shows its type, audience, date window, a bar of responses out of invited, score and status (Draft, Live, Closed or Analyzed). Cards show total surveys, surveys live now, total responses and the overall response rate.
- **What you can do:**
    - Add a survey (**+ New Survey**).
    - Add **Questions** so employees answer it in the app, and see its **Results**.
    - Edit a survey.
    - Change its status.
    - Delete a survey.
- **How to run a survey in the app:**
    1. Click **+ New Survey**, enter the **Title** and **Type** (for example Pulse or eNPS), and the dates if you want a window. Click **Create Survey**.
    2. Click **Questions** on the survey and **+ Add question**. Each question is a **Rating (1–5)**, a **Recommend (0–10)** or a **Comment**. Click **Save questions**.
    3. Change its status to **Live**. Every current employee is counted as invited, and the survey appears for them under **My Portal** → **Surveys**.
    4. When enough people have answered, click **Results**. When you're done, set the status to **Closed** (or **Analyzed**).
- **How to record a survey you ran elsewhere:**
    1. Create the survey and leave it without questions.
    2. When results come in, click **Edit** and enter the **Invited** count, the **Responses** count and the **Score** (for example "+42" or "4.1/5").
- **Good to know:**
    - **Answers are anonymous.** They are saved without the employee's name. HR can see that someone has answered, but not what they said. A second submission by the same person is refused.
    - **Results are hidden until at least 3 people have answered**, so nobody can be picked out of a very small group. This also applies to comments.
    - The score is worked out for you: the eNPS (promoters minus detractors, as a whole number, for example "+33") from the first Recommend question, otherwise the average rating out of 5.
    - Employees can answer only while the survey is **Live** and today is inside its start and end dates (a blank date is open-ended).
    - Surveys in the app go to every current employee. The **Audience** field is a label only.
    - Questions can be changed only while the survey is a Draft that nobody has answered.
    - For a survey with questions, the invited, response and score figures are worked out by the app, so you can't type them in.

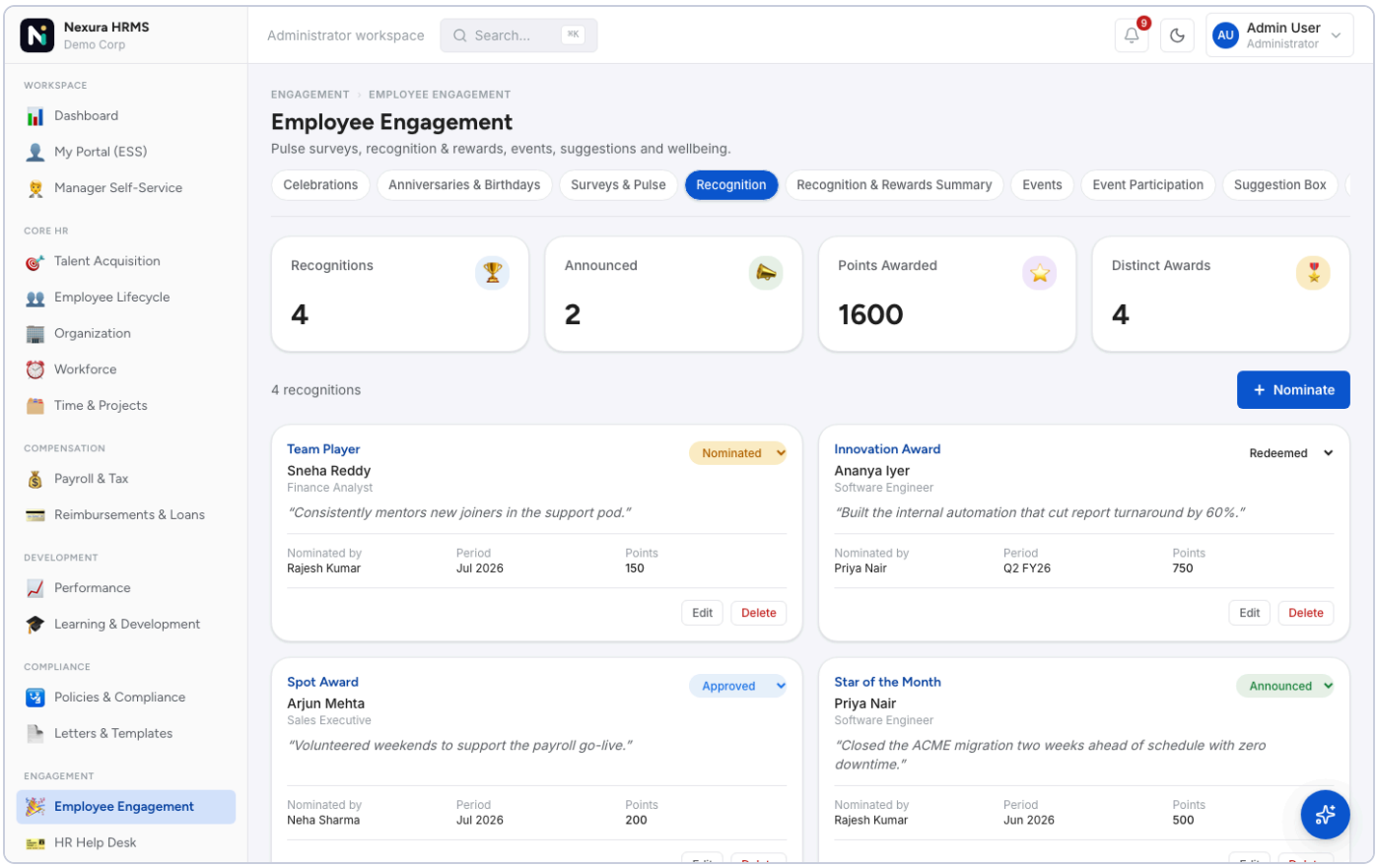
Survey Results



Survey results

- **Who can use it:** Admin and HR.
- **What it shows:** The answers to one survey that was run in the app: how many people responded out of those invited, the survey's score, and for each question either the average rating with a count for each rating, the Recommend score with promoters, passives and detractors, or the comments people wrote.
- **How to open it:** On **Surveys & Pulse**, click **Results** on the survey. The button appears for surveys that have questions.
- **Good to know:**
    - Until at least 3 people have answered, the page only says how many have responded. This protects people in a very small group.
    - Comments are shown without names and in no particular order.
    - This page is for viewing only.

Recognition



Recognition

- **Who can use it:**
    - Everyone can view the recognition wall.
    - Admin, HR and Managers can nominate, edit, change status or delete.
    - Managers can do this only for their direct reports.
    - No one can nominate themselves.
- **What it shows:** Award cards. Each card shows the award, employee, designation, citation, nominated by, period, points and status (Nominated, Approved, Announced or Redeemed). Cards at the top count recognitions, recognitions announced, points awarded and distinct awards.
- **What you can do:**
    - Nominate someone (**+ Nominate**).
    - **Edit** a recognition.
    - Change its status.
    - **Delete** a recognition.
- **How to:** nominate an employee
    1. Click **+ Nominate**.
    2. Choose the **Employee**.
    3. Enter the **Award** (for example Spot Award) and the **Period** (for example "Jul 2026" or "Q2 FY27"). Both are required.
    4. Add **Points**, a **Citation** and **Nominated By**.
    5. Click **Nominate**.
    6. Move the status to Approved and then Announced when ready.

- **Good to know:**
    - Employees can view this page; the add, edit and delete buttons are shown only to Admin, HR and Managers.
    - Type the nominator's name in **Nominated By**. It isn't filled in for you.
    - Points are a number on the record. There's no reward store, so "Redeemed" is a status you set once the reward has been given.

Recognition & Rewards Summary

- **Who can use it:** Admin, HR, Manager. Managers see only their direct reports.
- **What it shows:** For one recognition period (the latest by default), each recipient's number of awards, award names, total points and redeemed points. Recipients with the most points come first. The summary line shows how many awards are still awaiting approval (Nominated).
- **What you can do:**
    - Pick a period from the chips.
    - Download with ⬇ **Excel**.
- **Good to know:** This page is for viewing only. Points are totalled across all statuses, including nominations not yet approved.

Events

- **Who can use it:** Everyone can view. Admin, HR and Managers can add, edit, change status or delete events.
- **What it shows:** Event cards. Each card shows the type, title, date, location, RSVP count, budget and status (Upcoming, Ongoing, Completed or Cancelled). Cards at the top show total events, upcoming or ongoing events, total RSVPs and total budget.
- **What you can do:**
    - Add an event (**+ Add Event**).
    - **Edit** an event.
    - Change its status.
    - **Delete** an event.
- **How to:** add an event
    1. Click **+ Add Event**.
    2. Enter the **Title** and **Type** (for example Townhall or Offsite).
    3. Add the **Date**, **Location**, **RSVP Count** and **Budget (₹)**.
    4. Click **Add Event**.
- **Good to know:**
    - **Employees don't RSVP in the app.** Collect RSVPs your usual way and enter the total in **RSVP Count**.
    - The app doesn't send invitations or reminders, so send these yourself.
    - Employees can view this page; the add, edit and delete buttons are shown only to Admin, HR and Managers.

Event Participation

- **Who can use it:** Admin, HR.
- **What it shows:** Events with the RSVPs and budget for each. Upcoming events come first (soonest date), then past events (most recent first). The summary line shows totals.
- **What you can do:**
    - Filter by status.
    - Download with ⬇ **Excel**.
- **Good to know:** This page is for viewing only. RSVP numbers are the totals entered on each event.

Suggestion Box

- **Who can use it:** Everyone can view ideas and submit their own. Only Admin and HR can edit an idea, change its status or delete it.
- **What it shows:** Ideas, sorted by votes. Each idea shows its title, number, category, who submitted it (or "Anonymous"), status (Submitted, Under Review, Accepted, Implemented or Rejected) and description. Cards count ideas submitted, ideas implemented, total votes and categories.
- **What you can do:**
    - Submit an idea (**+ Submit Idea**).
    - Admin and HR can also **Edit** an idea, change its status and **Delete** it.
- **How to:** submit an idea
    1. Click **+ Submit Idea**.
    2. Enter the **Title** and **Category**: Process, Product, Culture, Cost or Other.
    3. Add a **Description**.
    4. Tick **Submit anonymously** if you don't want your name shown.
    5. Click **Submit Idea**. Your idea starts as Submitted, with your name as the submitter (unless you chose anonymous).
- **How to:** review an idea (Admin and HR)
    1. Change the idea's status as you review it, for example to Under Review, Accepted or Implemented.
    2. To correct details, click **Edit**. Here you can also update **Submitted By** and **Votes**.
- **Good to know:**
    - There's no voting button. Admin and HR enter the **Votes** figure on the idea.
    - When an idea is anonymous, no name is stored.

Suggestion Box Summary

- **Who can use it:** Admin, HR.
- **What it shows:** All suggestions. Open ideas (Submitted or Under Review) come first, oldest at the top, with their age in days. Decided ideas follow, newest first. The summary line shows open ideas, implemented ideas and the age of the oldest open idea.
- **What you can do:**
    - Filter by status.
    - Download with ⬇ **Excel**.
- **Good to know:** This page is for viewing only. Anonymous ideas never show a submitter.

Survey Participation

- **Who can use it:** Admin, HR.
- **What it shows:** For each survey, the number invited, the number of responses, the participation percentage (responses ÷ invited) and the score as recorded. The summary line shows overall participation.
- **What you can do:**
    - Filter by **All**, **Live**, **Closed** or **Analyzed**.
    - Download with ⬇ **Excel**.
- **Good to know:**
    - This page is for viewing only.
    - For surveys with questions, the counts come from the answers given in the app; for other surveys they are the figures entered in **Surveys & Pulse**. This page never shows individual answers.
    - If a survey has 0 invited, its participation shows "—".

Wellbeing

- **Who can use it:** Everyone can view. Admin, HR and Managers can add, edit or delete programmes.
- **What it shows:** Wellbeing programmes grouped by pillar (Physical, Mental, Financial or Social). Each programme shows its description, provider, number enrolled and whether it's active. Cards count programmes, active programmes, total enrolled and pillars.
- **What you can do:**
    - Add a programme (**+ Add Program**).
    - **Edit** a programme.
    - **Delete** a programme.
- **How to:** add a programme
    1. Click **+ Add Program**.
    2. Enter the **Name** and choose a **Pillar**.
    3. Add the provider, **Enrolled** count, **Active?** and description.
    4. Click **Add Program**.
- **Good to know:**
    - **Employees don't enrol themselves in the app.** Enter the headcount in **Enrolled**.
    - To mark a programme active or inactive, use **Edit**.
    - Employees can view this page; the add, edit and delete buttons are shown only to Admin, HR and Managers.

Wellbeing Participation

- **Who can use it:** Admin, HR.
- **What it shows:** Programmes ranked by enrolment, with a bar for each. Each row shows the programme's pillar, provider and whether it's active. The summary line counts programmes, active programmes and total enrolments.
- **What you can do:**

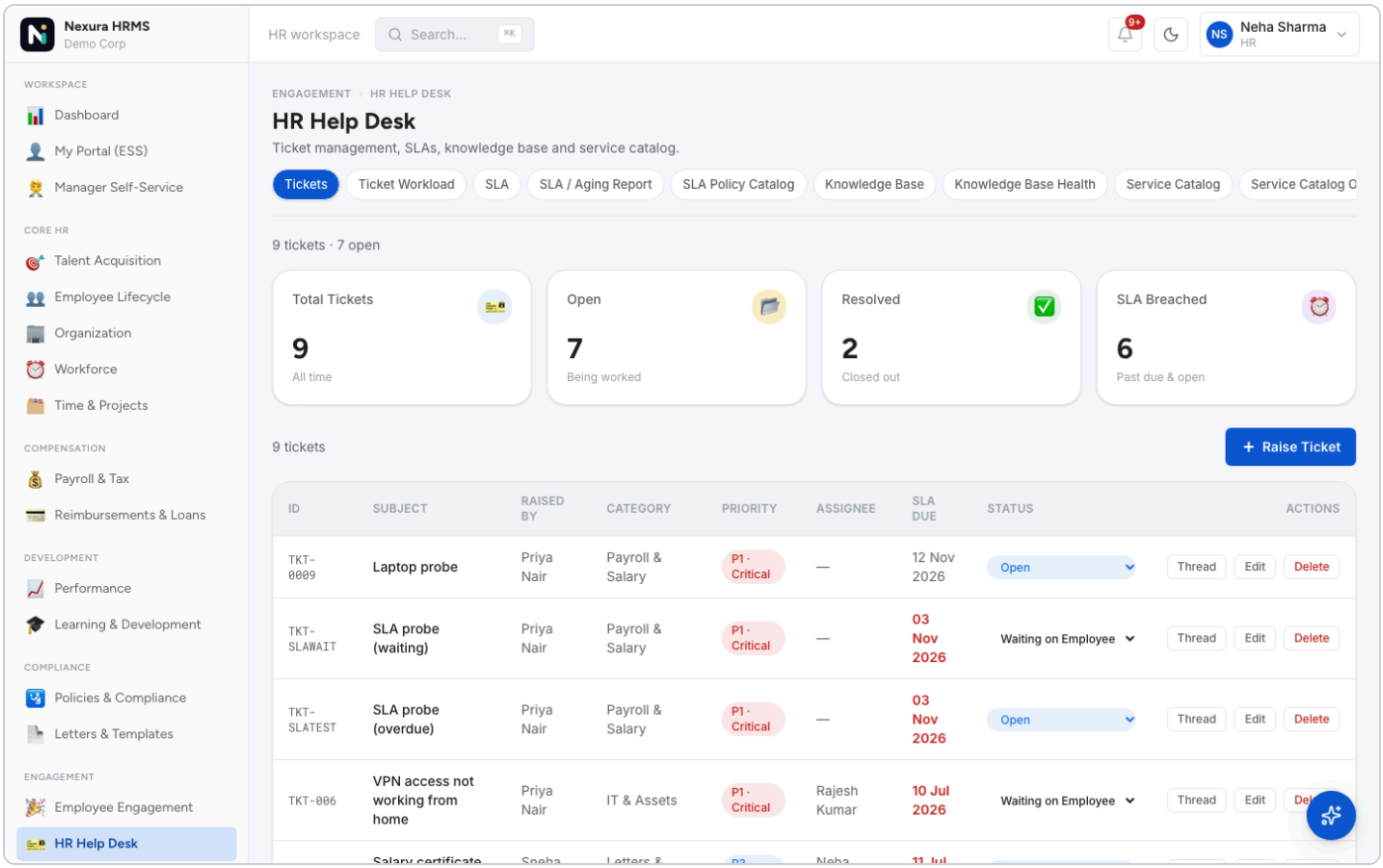
    - Filter by pillar.
    - Download with ⬇ **Excel**.
- **Good to know:** This page is for viewing only. It shows participation, not costs, as wellbeing budgets aren't tracked here.

HR Help Desk

Purpose: Handle employee queries as tickets, with SLA targets, a knowledge base and a catalogue of HR services.

Who sees this module: Everyone (Admin, HR, Manager and Employee). Some pages are limited to certain roles, as shown below. Employees raise and follow their own tickets from the **HR Helpdesk** page in their self-service portal.

Tickets



Help desk tickets

- **Who can use it:** Admin and HR see and work on every ticket. Managers see and work on tickets raised by their direct reports or by themselves.
- **What it shows:** Tickets, newest first. Each ticket shows its number, subject, who raised it, category, priority (P1 Critical to P4 Low), assignee, SLA due date and status (Open, In Progress, Waiting on Employee, Resolved or Closed). Cards show total tickets, open tickets, resolved tickets and **SLA Breached** (still open after the SLA due date).
- **What you can do:**
    - Log a ticket for an employee (**+ Raise Ticket**).

    - Change a ticket's status.
    - Open the **Thread** to read replies and add your own.
    - **Edit** a ticket.
    - **Delete** a ticket.
- **How to:** reply to and resolve a ticket
    1. Click **Thread** on the ticket.
    2. Type in **Add a reply** and click **Send Reply**. To leave a note only staff can see, tick **Internal note (not visible to employee)** first.
    3. When the issue is sorted, click **Edit**, fill in **Resolution**, and set the status to **Resolved** or **Closed**.
- **How to:** raise a ticket for someone
    1. Click **＋ Raise Ticket**.
    2. Choose **Raised By** (the employee), **Category** and **Subject**.
    3. Set the priority and assignee. Leave **SLA Due** blank to have it set from your SLA policy, or pick a date yourself.
    4. Click **Raise Ticket**.
- **Good to know:**
    - **The employee is notified automatically** when you change the ticket's status or send a reply that isn't an internal note. The notification shows the ticket number only.
    - **SLA Due is filled in for you.** When a ticket is raised (by you or by the employee from My Portal) with no SLA Due date, Nexura looks for an active policy on the **SLA** page with the same category and priority and sets the due date to the opened date plus the policy's resolution time, rounded up to whole days. If there's no matching policy, the date stays blank and you can set it yourself. A date you type always wins.
    - **You're alerted when a ticket is late.** Once a day, Admin and HR get one notification listing tickets that are still **Open** or **In Progress** after their SLA due date, naming the escalation contact from the policy. Each ticket is alerted only once; if you change its due date, it can be alerted again. Tickets **Waiting on Employee** aren't alerted, because the next move is the employee's.
    - **Type the assignee's name** in **Assignee**. Spell it the same way each time so the workload report groups it correctly.

Ticket Workload

- **Who can use it:** Admin, HR.
- **What it shows:** One row per assignee, busiest first. Each row shows open tickets, resolved tickets, open P1/P2 tickets, SLA breaches and the date of the oldest open ticket. Tickets with no assignee are grouped under "Unassigned".
- **What you can do:**
    - Filter by priority (P1–P4).
    - Download with **⬇ Excel**.
- **Good to know:** This page is for viewing only. Assignees are grouped by the exact name typed, so "Priya" and "Priya S" appear as separate rows.

SLA

- **Who can use it:** Admin, HR and Manager.
- **What it shows:** SLA policies. Each policy shows its category, priority, first-response time, resolution time (in hours or days), who a breach escalates to, and status (Active, Draft or Retired).
- **What you can do:**
    - Add a policy (**+ Add Policy**).
    - **Edit** a policy.
    - Change its status.
    - **Delete** a policy.
- **How to:** add an SLA target
    1. Click **+ Add Policy**.
    2. Enter the **Category** and choose a **Priority**.
    3. Set **First Response (hrs)** (default 8) and **Resolution (hrs)** (default 24), and enter **Escalate To**.
    4. Click **Add Policy**.
- **Good to know:**
    - **Active policies set ticket due dates.** A new ticket whose category and priority match an active policy (the category is matched ignoring capital letters) gets its **SLA Due** date from the **Resolution (hrs)** time, rounded up to whole days. Draft and Retired policies are ignored.
    - **Escalate To** is shown in the daily late-ticket alert to Admin and HR. Nexura doesn't reassign the ticket or send a message to that person.
    - **First Response (hrs)** is a target for your team. It isn't tracked or alerted.
    - Due dates are whole days, not times of day, and weekends and holidays aren't skipped.

SLA / Aging Report

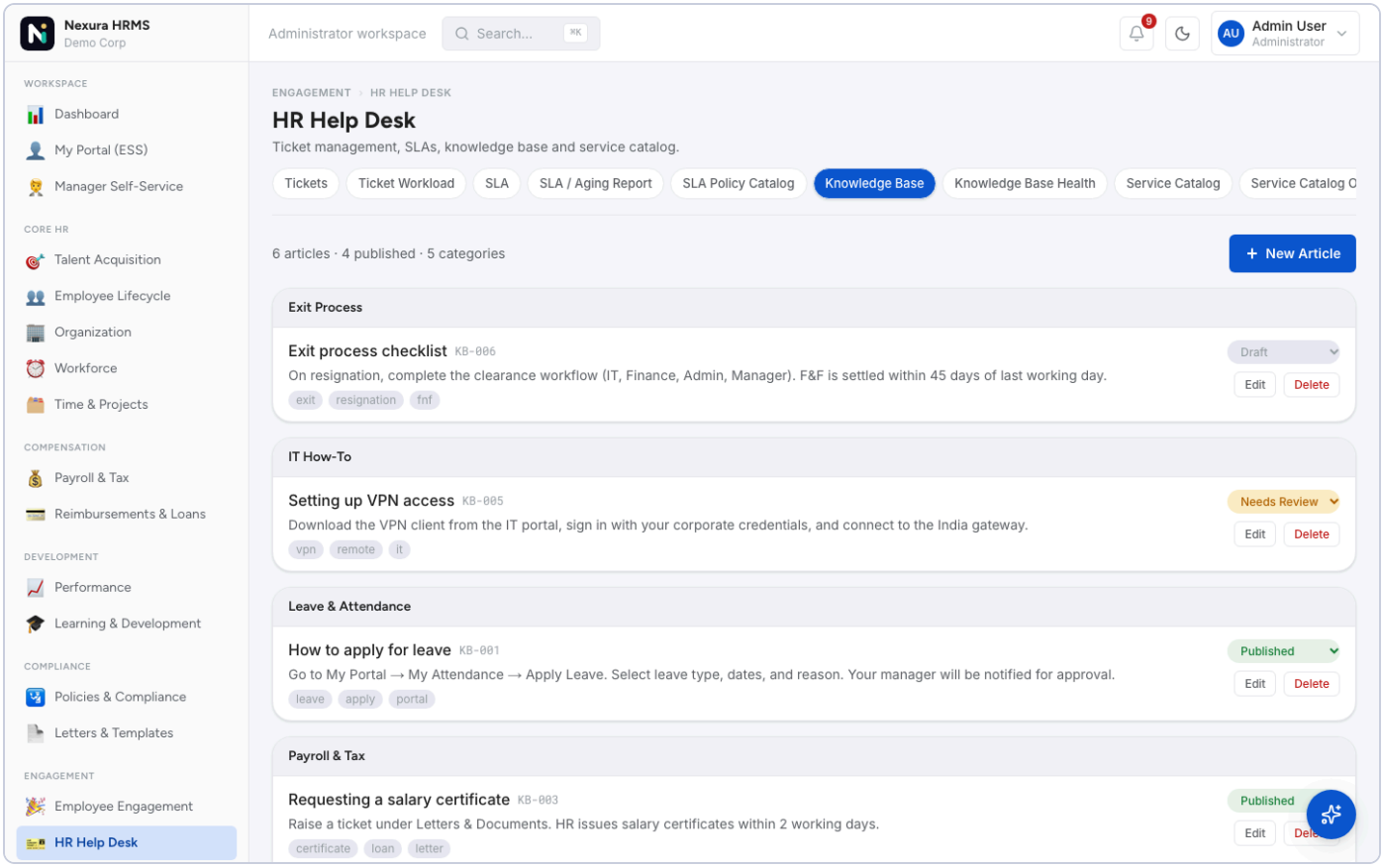
- **Who can use it:** Admin, HR.
- **What it shows:** Tickets with their age in days since they were opened. Each open ticket is marked **breached** (past its SLA due date) or **on track**. The summary line shows open tickets, resolved tickets, breaches and the average age of open tickets.
- **What you can do:**
    - Switch between **Open** (the default, oldest first) and **All**.
    - Download with **⬇ Excel**.
- **Good to know:** This page is for viewing only. An open ticket with no SLA due date always shows as "on track". Tickets get one automatically when an active SLA policy matches their category and priority; otherwise set it yourself.

SLA Policy Catalog

- **Who can use it:** Admin, HR.
- **What it shows:** SLA policies, P1 first. Each shows its category, response and resolution hours, escalation contact and status.
- **What you can do:**

    - Filter by priority.
    - Download with ⬇ **Excel**.
- **Good to know:** This page is for viewing only. Make changes in **SLA**.

Knowledge Base



Knowledge base

- **Who can use it:**
    - Employees read **Published** articles.
    - Managers see Published articles plus the articles they own. They can add articles and edit, change the status of or delete their own.
    - Admin and HR see and manage every article.
- **What it shows:** Help articles grouped by category. Each article shows its title, number, full text, tags and status (Published, Draft, Needs Review or Archived).
- **What you can do:**
    - Add an article (**+ New Article**).
    - **Edit** an article.
    - Change its status.
    - **Delete** an article.
- **How to:** publish an article
    1. Click **+ New Article**.
    2. Enter the **Title**, **Category** and **Body** (all required).

3. Add **Tags (comma separated)**. Admin and HR can also set the **Owner**. For Managers, the owner is always you.
4. Set **Status** to **Published**.
5. Click **Add Article**.

- **Good to know:**
  - Employees see an article only once it's **Published**, so you can safely keep work in progress as a Draft.
  - There's no search box. Use clear titles and categories so people can find articles easily.

Knowledge Base Health

- **Who can use it:** Admin, HR.
- **What it shows:** Every article with its owner, status, last-updated date and how many days ago that was. Articles not updated for more than **180 days** are marked **stale**. The stalest articles come first.
- **What you can do:**
  - Filter by status.
  - Download with ⬇ **Excel**.
- **Good to know:** This page is for viewing only. Any change to an article, even a status change, resets its age.

Service Catalog

- **Who can use it:** Everyone can view. Admin, HR and Managers can add, edit, change status or delete services.
- **What it shows:** Cards for HR services. Each card shows the service, description, category, turnaround (for example "2 working days"), owner and status (Available, Coming Soon or Suspended).
- **What you can do:**
  - Add a service (**+ Add Service**).
  - **Edit** a service.
  - Change its status.
  - **Delete** a service.
- **How to:** add a service
  1. Click **+ Add Service**.
  2. Enter the **Service** and **Category**.
  3. Add a description, **Turnaround** and **Owner**.
  4. Click **Add Service**.
- **Good to know:**
  - **This is a list of the HR services on offer.** To ask for a service, employees raise a ticket from their HR Helpdesk portal page.
  - Employees can view this page; the add, edit and delete buttons are shown only to Admin, HR and Managers.

Service Catalog Overview

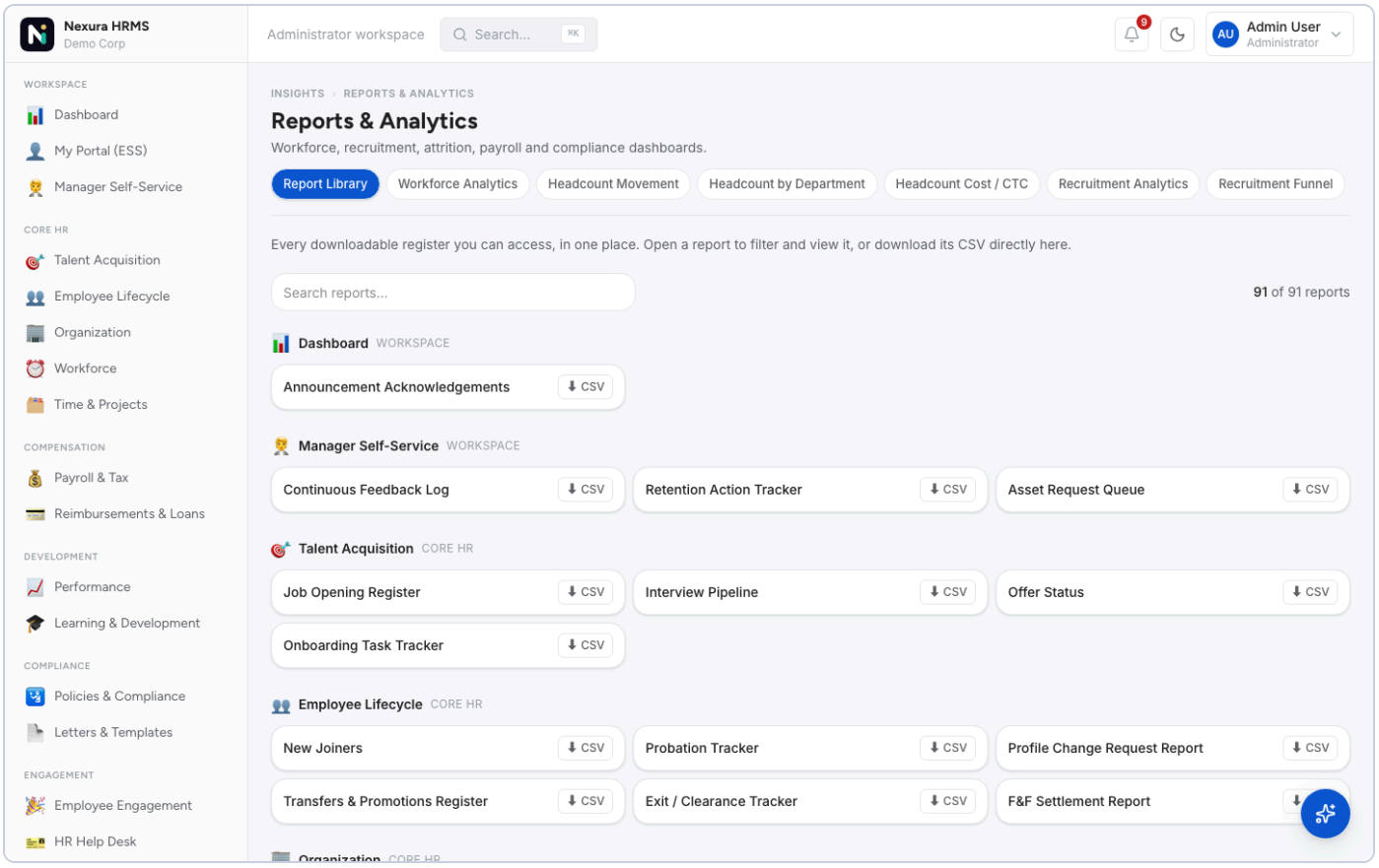
- **Who can use it:** Admin, HR.
- **What it shows:** A table of services with category, SLA promise, owner and status. The summary line counts available and suspended services.
- **What you can do:**
    - Filter by **All**, **Available**, **Coming soon** or **Suspended**.
    - Download with ⬇ **Excel**.
- **Good to know:** This page is for viewing only. Make changes in **Service Catalog**.

6. Insights (Reports & Analytics)

Reports & Analytics

Dashboards and downloadable reports on headcount, hiring, attrition, payroll and compliance. **Seen by:** Admin, HR and Manager. Some pages are for Admin and HR only, as noted, and Managers don't see them in their menu.

Report Library

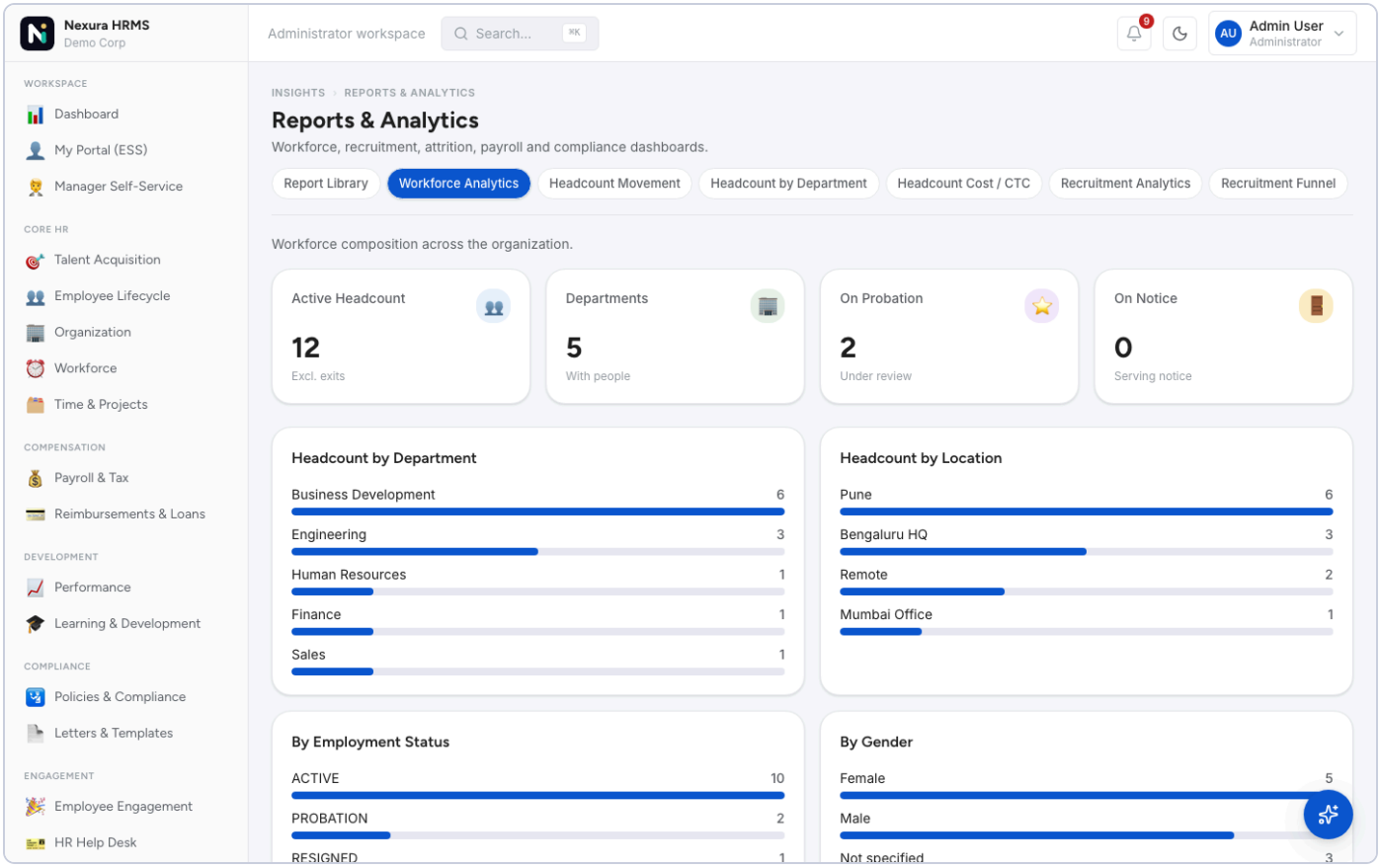


Report library

- **Who can use it:** Admin, HR and Manager. Each person sees only the reports their role can open.
- **What it shows:** every report or register you can access, grouped by module, with a count such as "12 of 40 reports".
- **What you can do:**
    - Search.
    - Open a report.
    - Download any report as an Excel file straight from the list.
- **How to find and download a report:**
    1. Type in **Search reports…**. You can search by report name, module or group.
    2. Click a report name to open it with its filters, or click ⬇ **Excel** to download it straight away.

- **Good to know:**
    - It lists registers and tables. The chart-style dashboards (Workforce, Recruitment, Attrition and Payroll Analytics, and the Compliance Dashboard) aren't included.
    - If your role has no reports, you'll see "No reports are available for your role."

Workforce Analytics



Workforce analytics

- **Who can use it:** Admin, HR and Manager.
- **What it shows:**
    - Tiles: **Active Headcount** (excludes exits), **Departments** (with people), **On Probation** and **On Notice**.
    - Bar lists: **Headcount by Department**, **Headcount by Location**, **By Employment Status** and **By Gender**.
- **What you can do:** view only.
- **Good to know:**
    - Figures cover the **whole company** for every role, including Managers.
    - There's no date filter or download on this page.

Headcount Movement

- **Who can use it:** Admin and HR see everyone. A Manager sees only their **direct reports**.
- **What it shows:**
    - **Opening**, **Joiners**, **Exits** and **Closing** headcount, plus the net change.

    - Two lists: **Joiners** (by joining date) and **Exits** (by last working day, with the reason).
- **What you can do:** choose a date range, and download Excel.
- **How to view a period:**
    1. Pick **From** and **To** dates. The current month is the default.
    2. Click **Apply**.
    3. Click ⬇ **Excel** to download the same range.
- **Good to know:**
    - Employees with no joining date aren't counted as joiners.
    - Someone still serving notice, with no last working day yet, isn't counted as an exit.

Headcount by Department

- **Who can use it:** Admin and HR see everyone. Managers see their direct reports only.
- **What it shows:** current headcount for each department, with its share and a total. Anyone still on the books counts: Active, Probation and Notice.
- **What you can do:** ⬇ **Excel** download.
- **Good to know:** this is a snapshot of today, with no date filter.

Headcount Cost / CTC

- **Who can use it:** Admin and HR only.
- **What it shows:** for each department, the **Headcount**, the number with **No CTC** on file, **Total CTC**, **Avg CTC** and the **Share** of total cost. A summary line gives the company total and average.
- **What you can do:** ⬇ **Excel** download.
- **Good to know:**
    - Based on each employee's annual CTC.
    - People with no CTC recorded are counted in headcount but add ₹0 to cost. They're highlighted in amber so you can fill in the gaps.

Recruitment Analytics

- **Who can use it:** Admin, HR and Manager.
- **What it shows:**
    - Tiles: **Open Positions**, **Active Candidates**, **Offers Made** and **Offers Accepted**.
    - Bar lists: **Hiring Funnel** (Applied → Screening → Shortlisted → Interview → Offer → Accepted, by current stage) and **Candidates by Source**.
- **What you can do:** view only.
- **Good to know:** figures are company-wide, with no filters or download.

Recruitment Funnel

- **Who can use it:** Admin and HR only.
- **What it shows:** for each job opening, the status (Open / On hold / Closed / Filled) and how many candidates were **Applied**, **Interviewed**, **Offered** and **Hired**, plus a **Conversion** % (hired ÷ applied). Candidates not tied to an opening appear as "Unassigned candidates".

- **What you can do:** ⬇ **Excel** download.
- **Good to know:**
    - The funnel is cumulative and based on each candidate's *current* stage. For example, someone at Offer also counts as Interviewed.
    - Rejected or withdrawn candidates count only as Applied.

Attrition Analytics

- **Who can use it:** Admin, HR and Manager.
- **What it shows:**
    - Tiles: **Attrition Rate** (an all-time figure: exits ÷ (active + exits)), **Total Exits** (resigned and terminated), **Serving Notice** and **Retained**.
    - Bar lists: **Exits by Department** and **Notice Period by Department**.
- **What you can do:** view only.
- **Good to know:**
    - Figures are company-wide for every role.
    - The rate is a rough all-time figure, not a yearly rate. Use **Attrition by Department** for a yearly view.

Attrition by Department

- **Who can use it:** Admin and HR see everyone. Managers see their direct reports only.
- **What it shows:** for the chosen year and each department, the **Exits**, **Current** staff, the **Base** (distinct people on the roll during the year) and **Attrition** %, plus a company total. 20% or more shows in red.
- **What you can do:** choose a year, and download Excel.
- **How to view a year:**
    1. Type a **Year**.
    2. Click **Apply**.
    3. Click ⬇ **Excel** to download that year.
- **Good to know:** the rate is an approximation (exits ÷ current staff plus leavers), not an average-headcount rate. The page says so too.

Payroll Analytics

- **Who can use it:** Admin and HR only.
- **What it shows:** for the **latest payroll run**:
    - Tiles: **Gross Payout**, **Net Payout**, **Total Deductions** and **Avg Net / Employee**.
    - **Gross Cost by Department (₹)**.
- **What you can do:** view only.
- **Good to know:**
    - Only the most recent run is shown. You can't pick another month here.
    - Before your first run, it says "No payroll runs processed yet."

Compliance Dashboard

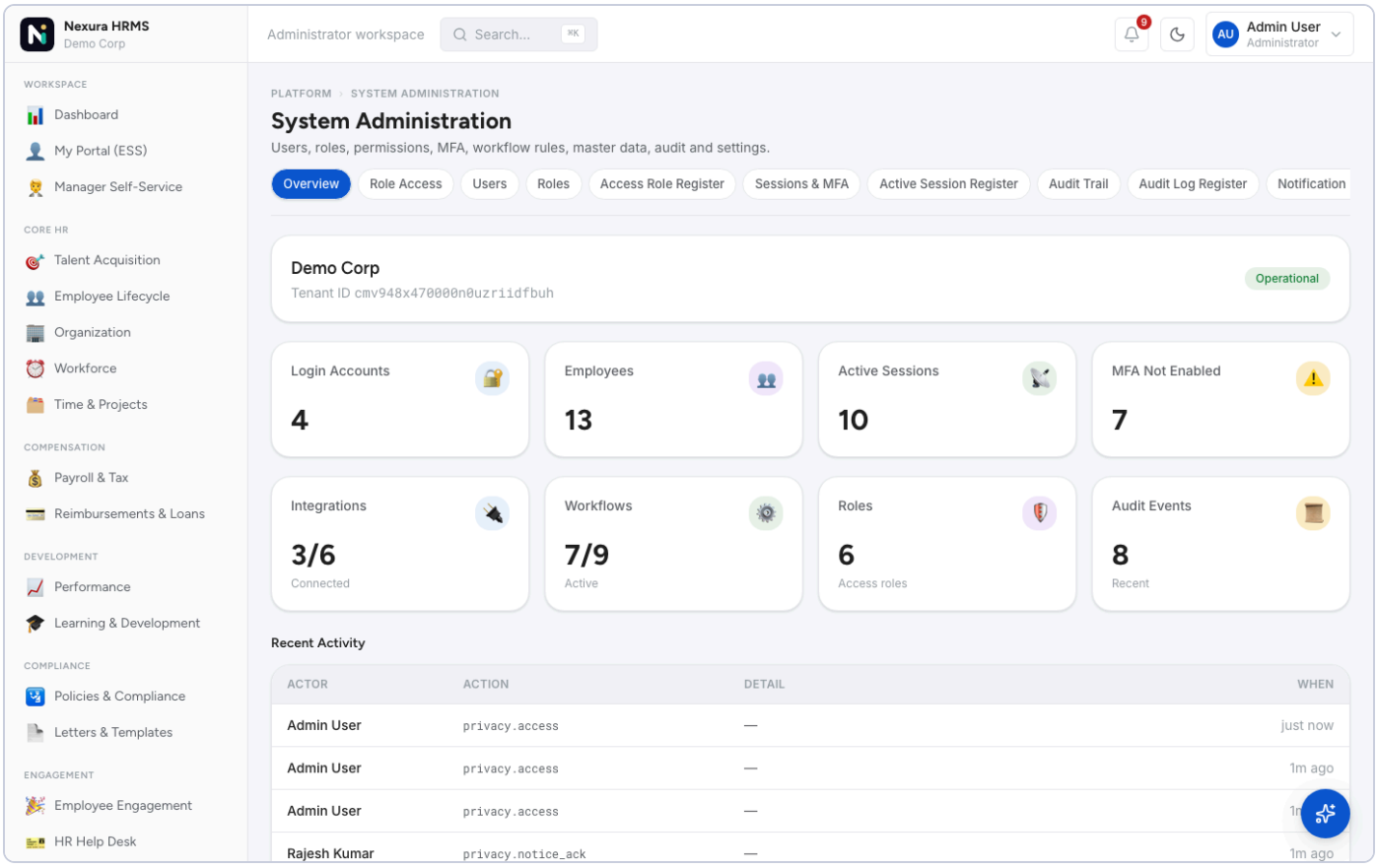
- **Who can use it:** Admin, HR and Manager.
- **What it shows:**
    - Tiles: **Published Policies** (x of y), **BGV In Progress**, **Open POSH Cases**, **Audit Findings** (with how many are overdue), **HR Policies**, **BGV Checks**, **Audits** and **Employee Documents**.
    - Status bars for HR Policies, Background Verification, POSH Complaints and Internal Audits.
- **What you can do:** view only.
- **Good to know:**
    - Counts are company-wide for everyone who can see the page, including Managers.
    - There are no filters or downloads.

7. Platform (System Administration and Billing)

System Administration

Users, roles, sessions and two-step sign-in, audit, master data, workflow rules, integrations, billing and company settings. **Seen by:** Admin only. HR reaches the approval rules as Workforce → **Approval Workflows**, and can also open **Master Data** from its address (/admin-dropdowns), though it isn't in HR's menu.

Overview

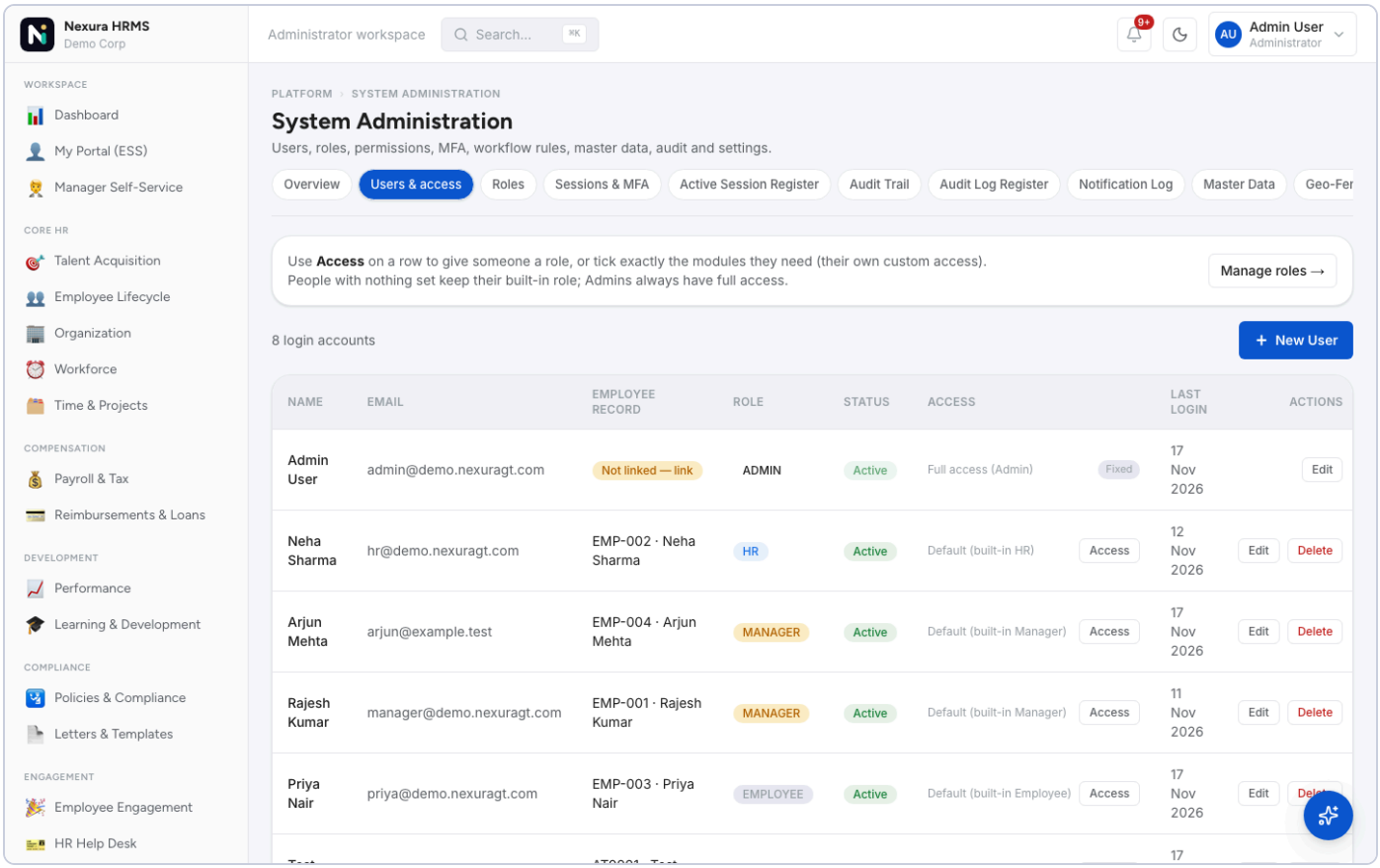


System Administration overview

- **Who can use it:** Admin.
- **What it shows:**
    - The workspace name and its **Tenant ID** (your workspace's reference number, useful when you contact Nexura support).
    - Tiles: **Login Accounts**, **Employees**, **Active Sessions**, **MFA Not Enabled**, **Integrations** (connected/total), **Workflows** (active/total), **Roles** and **Audit Events**.
    - A **Recent Activity** table with the last 8 audit entries.
- **What you can do:** view only.
- **Good to know:**
    - **MFA Not Enabled** counts signed-in sessions without two-step sign-in, not people.

- The **Roles** tile always shows 6. It's a fixed figure, not a live count.
- The "Operational" badge is always shown.

Users & access



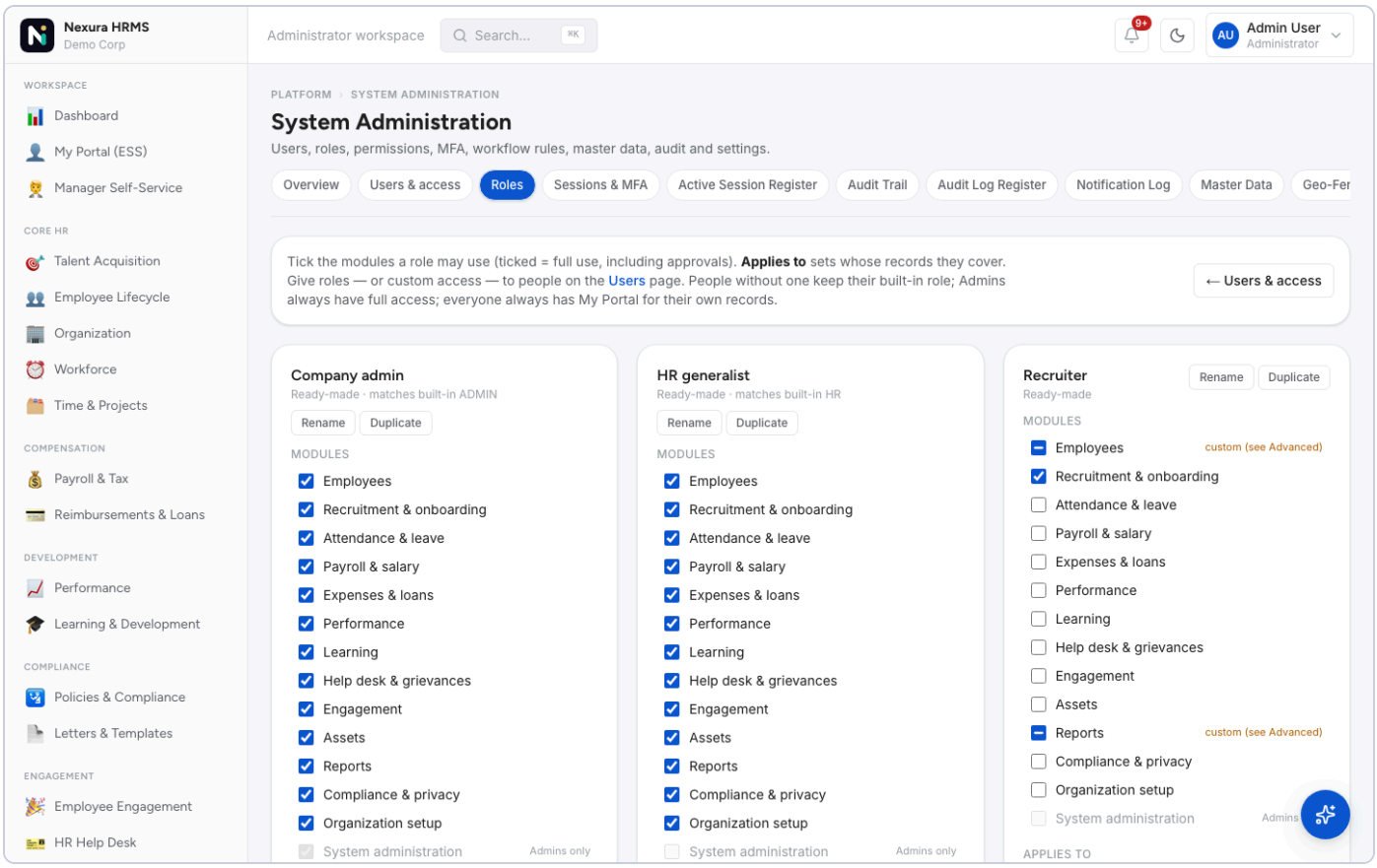
Users & access

- **Who can use it:** Admin.
- **What it shows:** every login, with Name, Email, **Employee record** (who the login is linked to), Role, Status (Active / Disabled), **Access**, Last Login and Actions.
- **What you can do:**
  - Add users, and edit their name, email, role, status, password and employee record.
  - Link a login to an employee record.
  - Give someone a role, or tick exactly the modules they need, with **Access**.
  - Disable, enable or delete a user.
- **How to add a user** (usually only for HR and Admins, since employees sign in with an emailed code; see Part A, section 2.7):
  1. Click **+ New User**.
  2. Fill in **Name**, **Email**, **Role** and **Password** (all required), and **Status**.
  3. Leave **Employee record** on **Find by email automatically**, or pick the person.
  4. Click **Create User**.
- **How to link a login to an employee record:**
  1. Click the amber **Not linked — link** on the row (or **Edit**).

2. Under **Employee record**, choose the person. The list shows employees who aren't linked to another login.
3. Click **Save Changes**.

- **How to change someone's access:**
    1. Click **Access** on the row.
    2. Under **Start from**, pick a role, such as Payroll HR or Recruiter, or **Custom**.
    3. Tick or untick modules, choose who it **Applies to** (Whole company, Their team, Their direct reports, Selected departments or locations, or Only themselves), and tick **Can see salaries (and bank details)** if needed.
    4. Optional: set **Expires on**, for example for someone covering while a colleague is on leave.
    5. Click **Save access**. To go back to the built-in role, click **Remove custom access**.
- **Good to know:**
    - Email addresses must be unique ("A user with that email already exists.").
    - An employee record can be linked to only one login.
    - Admins always have full access, so their **Access** shows **Fixed**.
    - People with nothing set under **Access** keep their built-in role.
    - You can't disable or delete yourself.
    - Disabling someone signs them out at once, and so does setting a new password for them.
    - When you click **Delete**, you're asked to confirm first, because it can't be undone.
    - Nexura doesn't send an invitation email. Share the sign-in details yourself.
    - Every change is recorded in the audit trail.

Roles



Roles

- **Who can use it:** Admin.
- **What it shows:** a card for each role. Each card lists the 14 modules with tick boxes, who the role **Applies to**, **Can see salaries (and bank details)**, and how many people have it. Ready-made roles include Company admin, HR generalist, Recruiter, Payroll HR, Attendance officer, Grievance / POSH officer, Line manager and Department head.
- **What you can do:**
    - Tick the modules a role may use. Ticked means full use, including approvals.
    - Choose who the role applies to.
    - Click **Save changes** on the card. It shows **✓ Saved** when done.
    - **+ New role**, **Rename** and **Duplicate** a role.
    - **Delete** a role you created, once nobody has it.
- **Good to know:**
    - Give roles to people on **Users & access** → **Access**.
    - Someone with several roles gets everything those roles give, added together.
    - Everyone always has My Portal for their own records.
    - Company-wide setup, such as holidays, leave types and Master Data, needs **Whole company**.
    - **Advanced settings** on a card shows finer controls, such as view-only access to a module.
    - The old **Role Access** and **Access Role Register** pages now open this page.

Sessions & MFA

- **Who can use it:** Admin.

- **What it shows:**
    - Tiles: **Sessions**, **MFA Enabled**, **MFA Coverage** % and **Without MFA**.
    - A table of signed-in sessions with User, Role, Device / Browser, Location · IP, MFA (On / Off) and Last Active. Your own session is tagged "This device".
- **What you can do:** sign out one browser, or sign out one user on every device.
- **How to sign someone out:**
    1. Find the session.
    2. Click **Revoke** to sign that browser out. It takes effect on that browser's next click.
    3. Or click **All devices** to sign that user out everywhere. If it's you, your current device stays signed in.
- **Good to know:**
    - Device and browser names are a best guess.
    - The location column is usually empty.
    - You can't revoke your own current session here. Use **Sign out** instead.

Active Session Register

- **Who can use it:** Admin.
- **What it shows:** the same sessions as a register: User, Device, IP / Location, MFA and Last Active, with a count of sessions with and without MFA.
- **What you can do:** filter by **All / Admin / HR / Manager / Employee**, and **⬇ Excel**.
- **Good to know:** this page is read-only. To sign anyone out, use **Sessions & MFA**.

Audit Trail

- **Who can use it:** Admin.
- **What it shows:** the **200 most recent** recorded actions, with Actor, Action, Entity, Detail and When ("5m ago"), plus tiles for Events, Distinct Actors and Entities Touched.
- **What you can do:** view only.
- **Good to know:**
    - There's no search, filter or download here. Use the **Audit Log Register** to download.
    - Entries can't be edited.

Audit Log Register

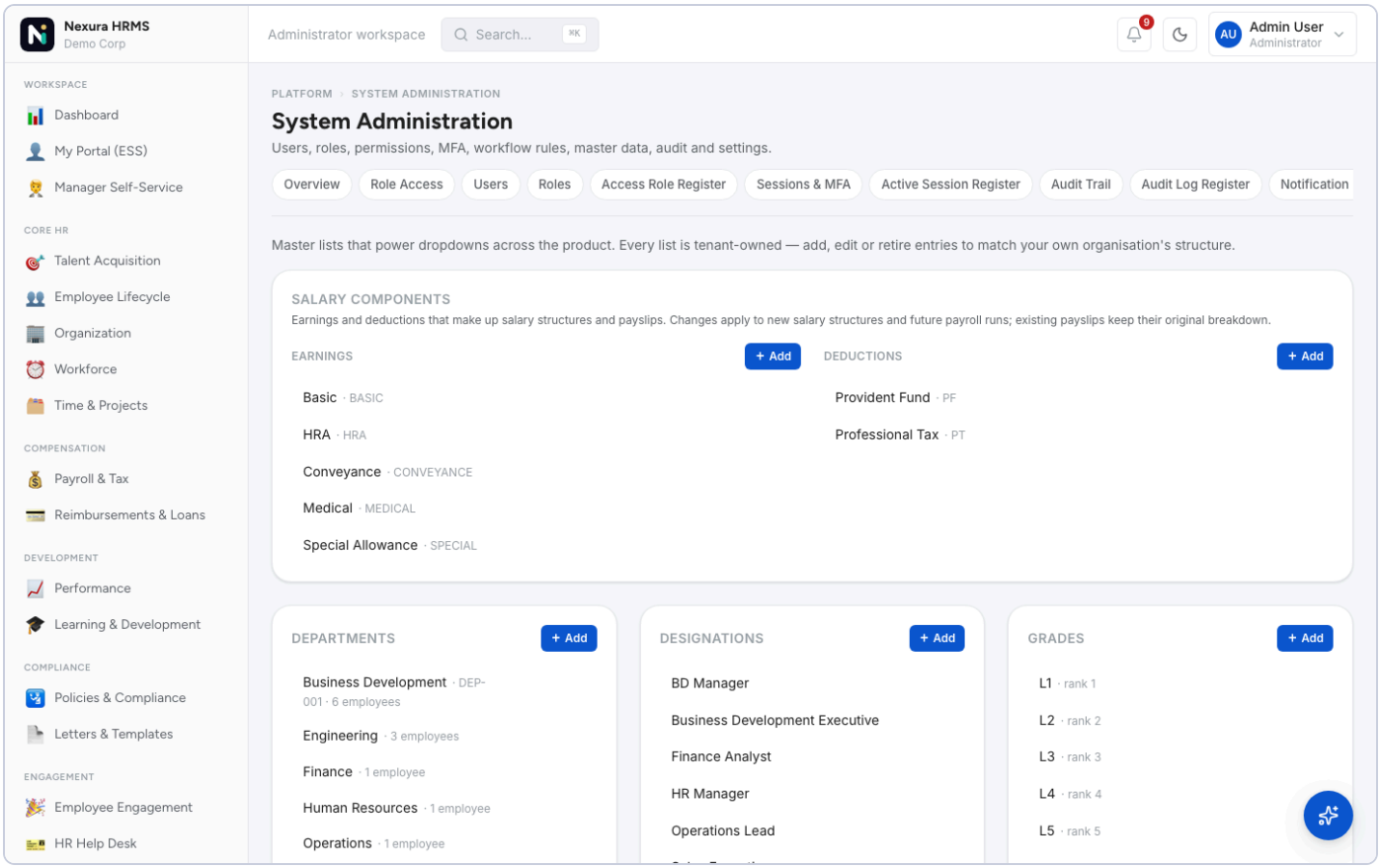
- **Who can use it:** Admin.
- **What it shows:** the **500 most recent** audit entries, with When, Actor, Action, and the Entity with its ID.
- **What you can do:** **⬇ Excel**.
- **Good to know:** there are no filters on this page.

Notification Log

- **Who can use it:** Admin.
- **What it shows:** the **500 most recent** in-app notifications sent to anyone in the company, with When, Recipient, Kind, Title and Read / Unread.

- **What you can do:** filter **All / Unread / Read**, and ⬇ **Excel**.
- **Good to know:** this covers in-app notifications only. It isn't a record of emails sent.

Master Data



Master data

- **Who can use it:** Admin. HR can also open the page from its address, but it isn't in HR's menu. Only Admins see the **Salary Components** section.
- **What it shows:** the lists that feed drop-downs across Nexura:
    - **Salary Components** (Earnings and Deductions)
    - **Departments** (name · code), with how many employees each has
    - **Designations**
    - **Grades** (name · rank)
    - **Locations** (name, city, state)
    - **Leave Types** (code, days a year, paid or unpaid)
- **What you can do:** add, edit and delete entries, and mark them Active or Inactive.
- **How to add an entry:**
    1. Click **+ Add** on the list.
    2. Fill in **Name** * and any extra fields:
        - Department: **Code**
        - Grade: **Rank**
        - Location: **City**, **State**
        - Leave type: **Code** *, **Days / Year**, **Paid**

        - Salary component: **Type**, **Display order**, **Code** (built from the name if left blank)
    3. Choose **Status**.
    4. Click **Add**.
- **How to edit an entry:**
    1. Hover over it and click **Edit**.
    2. Make your changes.
    3. Click **Save Changes**.
- **Good to know:**
    - When you click **Del**, you're asked to confirm first, because it can't be undone.
    - A department with employees, or with a manager or department change waiting for approval, shows **In use** instead of **Del**. To retire it, click **Edit** and untick Active.
    - Other entries that are still in use (for example a location with employees) may stay in the list after you delete them. Set them to **Inactive** instead.
    - Deleting a department or location switches off announcements aimed at it. They become Inactive, and you can point them at another audience.
    - To retire any entry without deleting it, set it to **Inactive**.
    - Salary component changes apply to new structures and future payroll runs only. Existing payslips don't change.

Geo-Fences Setup

- **Who can use it:** Admin.
- **What it shows:**
    - Tiles: **Configured Fences**, **Active**, **Inactive** and **Coverage** (km² of active fences).
    - A card for each fence with its location, address, latitude, longitude and radius in metres.
    - GPS attendance punches made outside every active fence are held for review.
- **What you can do:** view only on this page.
- **Good to know:** to add or change fences, go to Workforce → **Geo-Fences** (Admin and HR). Use **+ New Geo-Fence**, then **Edit** or **Delete**. You'll be asked to confirm before a fence is deleted.

Workflow Rules

- **Who can use it:** Admin and HR. HR finds it as Workforce → **Approval Workflows**.
- **What it shows:**
    - Tiles: **Approval rules**, **Active**, **Legacy (not applied)** and **Delegations**.
    - The rules table: Rule, Module, Priority, When, Approval chain, Status and Actions.
    - Older free-text rules, listed as "Legacy (not applied)".
    - A **Test the rules** panel, an **Approval delegations** panel and a **Department heads** panel.
- **How rules are chosen:**
    - When someone submits a Leave, Expense, Regularization, Overtime or Comp-off request, Nexura uses the first **active** rule for that module whose conditions all match. Lower priority numbers are checked first.

    - Rules can also cover **Salary revision**, **Promotion**, **Job offer** and **Org change** (manager or department change). Only Admins can manage rules for these four. See the chapter *Sign-in options, privacy and approvals*.
    - If no rule matches, the built-in chain applies:
        - Leave, Expense, Regularization, Overtime and Comp-off: the reporting manager, or HR/Admin if there's no manager. Expense claims then go on to HR/Admin.
        - Salary revisions, promotions and job offers: any HR or Admin user.
        - An HR user's manager or department change: any Admin.
    - Nobody ever approves their own request.
- **What you can do:**
    - Create, edit, pause or resume, delete and test rules.
    - Convert legacy rules.
    - Set department heads.
    - Set up approval delegations.
- **How to create a rule:**
    1. Click **+ New Rule**.
    2. Enter a **Rule name ***, *choose the* ***Module*** *****, set **Priority (lower first)**, and tick **Active (applies to new requests)**.
    3. Under Conditions, fill in only what you need. A blank condition means "any".
        - **Leave:** Days at least / at most, Leave types, Paid / unpaid
        - **Expense:** Amount at least / at most (₹), Categories
        - **Overtime:** Hours at least
        - **All modules:** Departments, Locations, Grades, Employee status
    4. Under Approval steps, pick the **Approver** for Step 1:
        - Reporting manager
        - Skip-level manager (the manager's manager)
        - Department head
        - Role: HR, Admin, or HR or Admin
        - Specific user
    5. Optionally set an **SLA (hours)** and **Escalate to after SLA**.
    6. Use **+ Add step** for more steps, up to 6. Reorder them with ↑ ↓ and remove one with **Remove**. "Skip if same approver(s) as the previous step" is ticked by default.
    7. Optionally use **Test this rule** in the same window.
    8. Click **Create rule**, or **Save rule** when editing.
- **How to test the rules:** in **Test the rules**, pick an **Employee ***, a **Module** and sample values (Days, Leave type, Amount, Category or Hours). Click **Run test** to see which rule applies and who would approve. Nothing is saved.
- **Other actions:**
    - Click the **Active** or **Paused** badge to switch a rule on or off.
    - **Delete** asks you to confirm first. Requests already submitted keep their approval chain.
    - **Convert** turns a legacy rule into a working one. It starts paused.

    - **Department heads:** pick a head for each department from the drop-down. It saves as soon as you choose. A department with no head skips the "Department head" step.
    - **Approval delegations:** choose the **Person away **, *who* ***Approves on their behalf*** **, and **From *** / **To *** dates, then click **Delegate approvals**. Use **End** to stop one early. Everyone can delegate their own approvals from My Profile. Only an Admin can set up or end a delegation for someone else.
- **Good to know:**
    - A step whose approver is missing, has left, or is the person who made the request is skipped. If no steps are left, HR or Admin decide.
    - A rule marked "Invalid — not applied" needs to be edited and saved again before it works.

Workflow Rule Register

- **Who can use it:** Admin.
- **What it shows:** all workflow rules, with Rule, Module, Trigger, Approval Chain, SLA and Status.
- **What you can do:** filter **All / Active / Draft / Paused**, and **⬇ Excel**.
- **Good to know:** this page is read-only. Edit rules on **Workflow Rules**.

Integrations

- **Who can use it:** Admin.
- **What it shows:**
    - Tiles: **Integrations**, **Connected**, **Errors** and **Categories**.
    - **Connector credentials**: a card for each built-in connector, marked "Configured" or "Not set".
    - A list of registered integrations, grouped by category.
- **What you can do:**
    - Save connector keys and settings.
    - Send a Slack test message.
    - Add, edit and delete entries in your own integration list, and set their status.
- **How to set up a connector:**
    1. Click **Configure** on the card.
    2. Fill in the settings and secret keys. To keep a secret you saved before, leave its box blank. Saved secrets are never shown again.
    3. Click **Save**.
    4. For Slack, once it's set up, click **Send test message**.
    5. To remove everything saved for a connector, use **Clear all**.
- **How to register another system:**
    1. Click **+ New Integration**.
    2. Fill in **Name **, ***Category*** **, Provider, Description and Status.
    3. Click **Register Integration**.
- **What each built-in connector does:**
    - **Slack:** sends approval and timesheet alerts to your channel.
    - **Tally:** its settings are used when you export payroll journals for Tally.

    - **LinkedIn:** posts job openings once a working access token and organisation ID are saved. Without them, you get ready-to-paste post text.
    - **WhatsApp:** your own business Phone Number ID routes WhatsApp attendance to your workspace. Messages are sent through Nexura's shared set-up. You can't enter Nexura's shared number, or a number already used by another workspace.
    - **Object Storage (S3):** settings saved here aren't used. Nexura stores your documents for you.
- **Good to know:** the registered integrations list is your own catalogue. You set each status (Connected / Disconnected / Error / Pending) **by hand**, and registering an entry doesn't connect anything.

Integration Register

- **Who can use it:** Admin.
- **What it shows:** your registered integrations, with Integration, Category, Provider, Last Sync and Status.
- **What you can do:** filter **All / Connected / Disconnected / Error / Pending**, and **⬇ Excel**.
- **Good to know:** this page is read-only, and shows the statuses you set by hand on **Integrations**.

Billing (Billing & plan)

- **Who can use it:** Admin only. It's available whatever your plan, and an Admin can still open it while the workspace is paused.
- **Two ways billing can run.** Nexura decides which one applies to your workspace:
    - **Managed by Nexura Admin** (the usual set-up): Nexura's central billing handles plans, trials and payments. This is described in detail below.
    - **Built-in billing**: see the short section at the end.

When billing is managed by Nexura Admin

What the page shows:

- The note "Prices exclude GST; 18% GST is added at checkout."
- **Current plan:** the plan name and a status badge. The badge is one of:
    - **Free trial**
    - **Awaiting first payment**
    - **Active**
    - **Payment overdue**
    - **Paused**
    - **Cancelled**
- How many employees you're billed for, for example "Billed for 23 employees." If the plan has a minimum, you'll see "Billed for 25 employees — the plan minimum (you have 23)."
- A line that depends on your status:
    - **Trial:** "Your free trial ends on 14 Nov 2026 (11 day(s) left). Choose a plan below to keep going without interruption."
    - **Active:** "Paid until <date> — renews automatically." The "renews automatically" part shows only when automatic payment is set up.

    - **Payment overdue:** "Your last payment didn't go through. Please complete it to keep access."
    - **Awaiting payment, Paused or Cancelled:** "Choose a plan below to (re)activate your workspace."
- **Choose a plan:** the plans you can pick. Each card shows:
    - The name and description.
    - The price per month and/or per year, plus GST. Per-employee plans show "₹X per employee / month + GST (N employees: ₹Y total)".
    - "Up to N employees" or "Unlimited employees", and any "Minimum billing N employees".
    - This section is hidden while your plan renews automatically.

Billed employees: everyone still on the books counts, including people on Probation and Notice. Resigned and Terminated employees don't count. The minimum is 1.

The trial

- Each company gets one free trial, which starts when you sign up. If it can't be confirmed straight away, you'll see "We're confirming your free trial" until it starts, usually within a day. See Part A, section 1.
- While it runs, Admins see a banner at the top of every page, "Free trial: N days left.", with a **Choose a plan** link.
- Other banners Admins may see:
    - "Your subscription is waiting for its first payment."
    - "Your last payment didn't go through — please update it to keep access."

Choosing a plan

1. Go to System Administration → **Billing**, or click **Choose a plan** in the banner.
2. On the plan you want, click **Choose monthly** or **Choose yearly**. For a free plan the button says **Switch to <plan name>**, and your current free plan shows "Your current plan". The button shows "Please wait…" while it works.
3. One of three things happens:
    - **Paid plan, online payment available:** you're taken to Razorpay's secure payment page. Pay there. Your plan becomes active once Nexura confirms the payment.
    - **Paid plan, online payment not yet available:** the page says "Online payment is being set up — choosing a paid plan sends a request and our team will contact you." After you click, a confirmation message appears under the button.
    - **Free plan:** it starts straight away, and the Dashboard reloads.
4. If something goes wrong, a message appears under the button, for example "Couldn't reach Nexura billing — please try again."

Cancelling a plan

- The **Cancel plan** link appears when your status is Free trial, Active, Awaiting first payment or Payment overdue.

1. Click **Cancel plan**.
2. Read the message: "Cancel your plan? It won't renew, and you keep access until <end date>. Your data stays safe and you can choose a plan again any time."
3. Click **Yes, cancel my plan**, or **Keep it** to change your mind.

4. A confirmation message from Nexura appears. Nexura Admin decides what happens for the rest of the billing period and emails the workspace owner a confirmation.

Keeping a plan after cancelling

- While a cancellation is waiting, the page shows "Your plan is set to end on <date>."
- Click **Keep my plan** to withdraw the cancellation.

Paused workspaces (for example when the trial is over, a payment is overdue or the plan is cancelled)

- **Everyone except Admins** sees "Your workspace access is paused", with the reason if Nexura gave one. The page says "Your data is safe and nothing is lost", explains that access returns once the administrator sorts it out, and gives the support address support@nexuragt.com. There's a **Sign out** button.
- **Admins** see the same page with a **Choose a plan** button. It opens a simplified Billing page (no sidebar, just your company name and **Sign out**) with the message: "Your workspace access is paused… Your data is safe — choose a plan below to restore access for everyone."
- Once a plan is active, everyone's access comes back. With a free plan, the app reloads straight away.
- No data is deleted while a workspace is paused.

Other things you might see

- **Billing not managed by Nexura:** the page shows a message from Nexura instead of plans.
- **Billing can't be reached:** you'll see "Billing information is temporarily unavailable. Please try again shortly."
- **Plan limits:** locked modules and pausing apply only when Nexura has switched plan limits on. Otherwise every module stays open.

Built-in billing (only if Nexura hasn't set up central billing)

- **The page shows:**
    - The plan name, the price per seat per month and a status badge: Trial, Active, Past due, Cancelled or Expired.
    - **Active seats**, **Est. monthly**, **Trial ends** or **Renews**, and **Trial days left**. The trial is 14 days.
    - An **Invoices** table with a **PDF** download for each invoice.
- **When Razorpay payments are connected:** you'll see **Subscribe now** and **Cancel subscription**. If you cancel, you keep access until the end of the current period.
- **When payments aren't connected:** a notice says so, and the workspace runs on the trial.
- **When the subscription lapses (if plan limits are on):** users see "Your workspace access is paused". Admins can reactivate from that page.

Invoice Register

- **Who can use it:** Admin.
- **What it shows:** invoices from **built-in** billing, with Billing Period, Plan, Seats, Amount, Paid and Status.
- **What you can do:** filter by status (All / Draft / Issued / Paid / Failed / Void), and ⬇ **Excel**.

- **Good to know:** when Nexura Admin manages your billing, invoices aren't listed here, so this page usually says "No invoices."

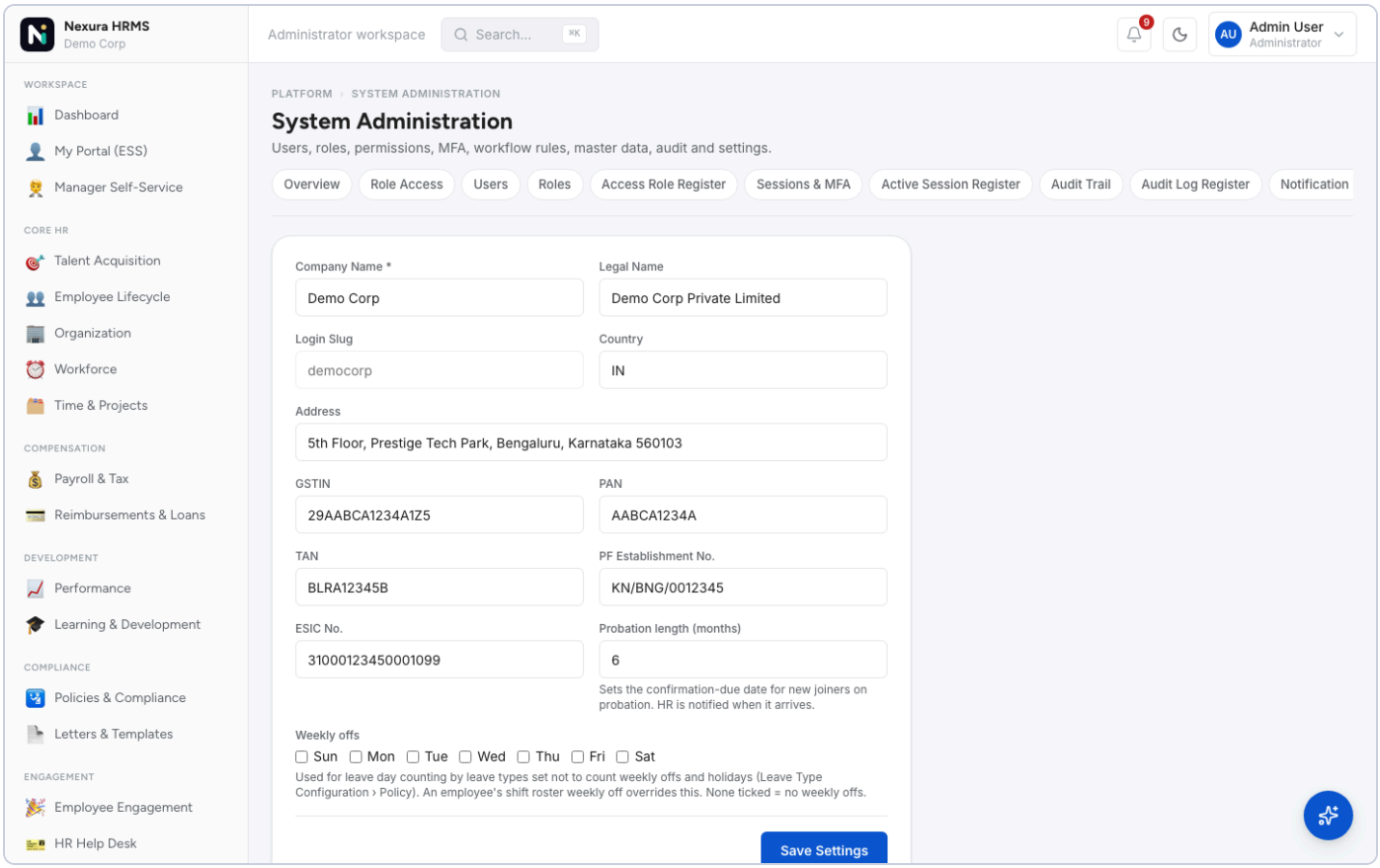
Plan Catalog

- **Who can use it:** Admin.
- **What it shows:** the built-in billing plans, with Plan, Per Seat / mo, Subscriptions and Status.
- **What you can do:** filter **All / Active / Inactive**, and **⬇ Excel**.
- **Good to know:**
    - These are the built-in plans, not the plans offered on **Billing** when Nexura Admin manages your billing.
    - The Subscriptions count covers all Nexura workspaces, not just yours.

Subscription Overview

- **Who can use it:** Admin.
- **What it shows:** your built-in subscription record: Plan, Status, Seats, Trial Ends, Current Period, Cancels at Period End and Started.
- **What you can do:** **⬇ Excel**.
- **Good to know:** when Nexura Admin manages your billing, this usually shows "This workspace has no subscription record." Use **Billing** to see your actual plan.

Settings



Settings

- **Who can use it:** Admin. Always available, whatever your plan.
- **What it shows and lets you do:**
    - **Company details:**
        - **Company Name** *, **Legal Name** and **Country** (defaults to IN).
        - **Login Slug**: your workspace address. It can't be changed.
        - **Address**, **GSTIN**, **PAN**, **TAN**, **PF Establishment No.** and **ESIC No.**
        - **Probation length (months)** (1–24): sets the confirmation-due date for new joiners on probation. HR is notified when it's reached.
        - **Weekly offs** (Sun–Sat tick boxes).
        - Click **Save Settings**. You'll see "Settings saved."
    - **Security policy: Require 2FA for everyone** / **Make 2FA optional** (see Part A, section 2.5).
    - **Privacy & DPDP** →: a link to the Privacy Centre, also covered in that chapter.
    - **Email delivery: Send test email** sends a test to your own address. If email isn't set up for your workspace, the button is greyed out and a note explains why.
- **Good to know:**
    - Probation values outside 1–24 are brought back into range, and a blank value becomes 6.
    - Changing weekly offs affects how leave days are counted from then on.

8. Sign-in options, privacy and approvals

This chapter covers sign-in options, data protection, approvals for pay changes and other recent additions. Where a page already has its own entry in an earlier chapter, the entry here lists only what is new or different.

Signing up for a new workspace

Create your workspace

- **Who can use it:** Anyone setting up a new company on Nexura. You become the workspace's first Admin.
- **What it shows:** The "Create your workspace" form (Company name, Workspace URL, Number of employees, Your name, Work email, Password), followed by a second step where you enter a code we email to you. A note under the form explains that each company gets one free trial.
- **How to create a workspace:**
    1. Fill in the form and click **Continue**. The button shows "Sending code…" while it works.
    2. We email a 6-digit code to your work email. Check your spam folder if it hasn't arrived.
    3. Type the code in **Verification code** and click **Verify and create workspace**.
    4. Your workspace is created and you are signed in.
- **What you can do on the code step:**
    - **Send a new code** if the first one didn't arrive or has expired.
    - **Use a different email** to go back and fill in the form again.
- **Good to know:**
    - Nothing is created until you enter the code. If you reload the page, it returns to the code step.
    - A code works for 10 minutes. You get 5 tries per code. After that, ask for a new code.
    - You can ask for a new code once a minute, and up to 5 codes per sign-up. After 30 minutes the sign-up expires and you fill in the form again.
    - Temporary or disposable email addresses are refused. Use your work email.
    - If the workspace URL is taken while you are entering the code, you are asked to fill in the form again with another URL.

Free trial check

- **Who it affects:** Every new workspace, when Nexura manages billing.
- **What happens:**
    - Each company gets one free trial. To spot repeat trials, Nexura keeps a one-way (hashed) identifier of your browser and your network, along with your work email and company name, and compares them with earlier sign-ups. These identifiers can't be turned back into your IP address or device.
    - If Nexura decides your sign-up is a repeat trial, the workspace is still created, but without a free trial. You land on **Billing & plan** and choose a plan to start using it.

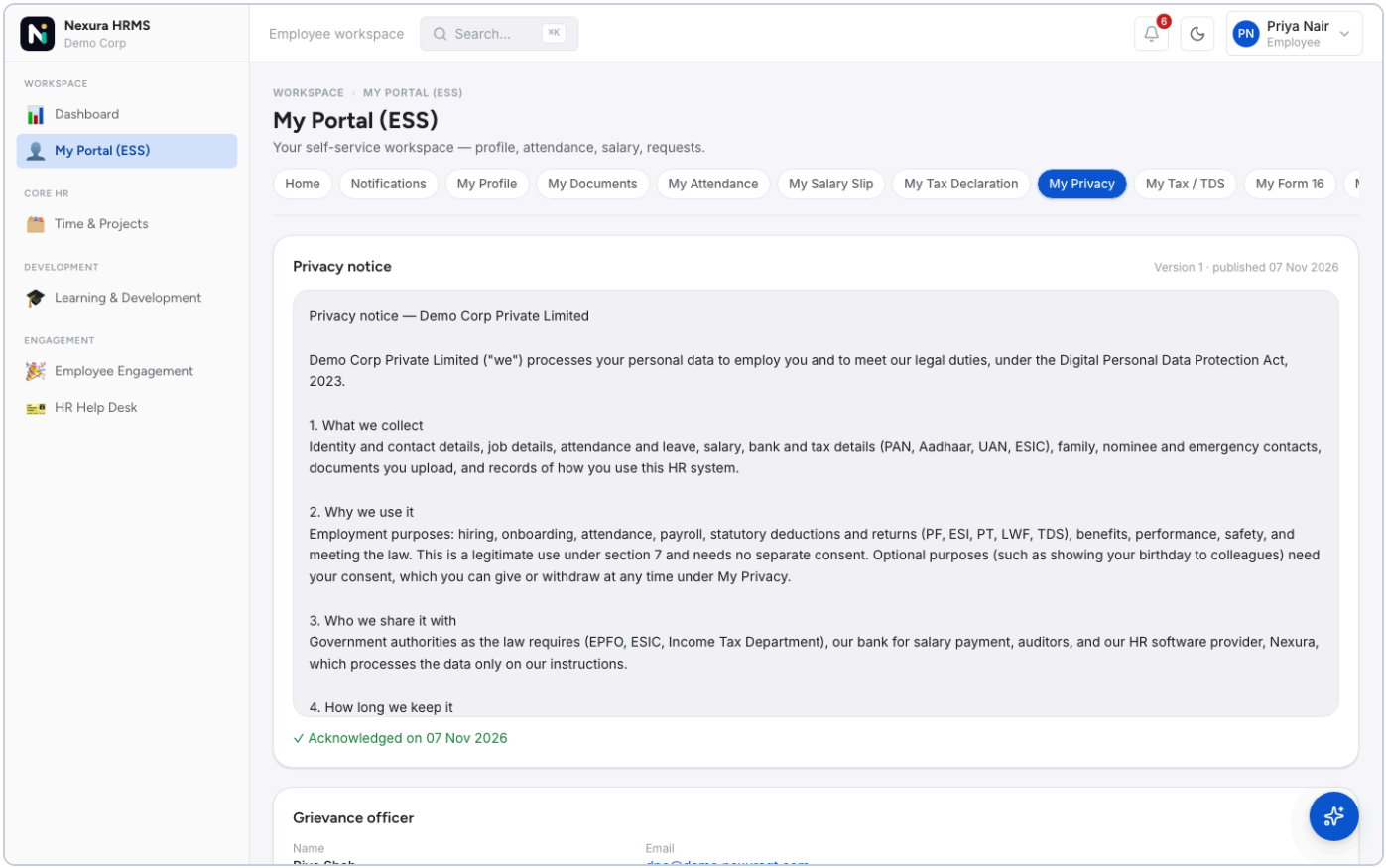
- If Nexura can't confirm your trial at sign-up, you see **"We're confirming your free trial"**. Your workspace and data are safe. The check usually finishes within a day, you get an email when the trial starts, and you don't lose any trial days. You can **Sign out** from this page.

Data protection (DPDP Act)

These pages help you meet the Digital Personal Data Protection Act, 2023. Employees use **My Privacy**. Admin and HR use the five pages under COMPLIANCE → **Policies & Compliance**. You can also reach the Privacy Centre from the **Privacy & DPDP** link on System Administration → **Settings**.

When an Admin publishes a privacy notice, everyone who hasn't acknowledged it sees a banner at the top of every page: "Your company has published a privacy notice. Please read and acknowledge it." with a **Read the notice** link.

My Privacy



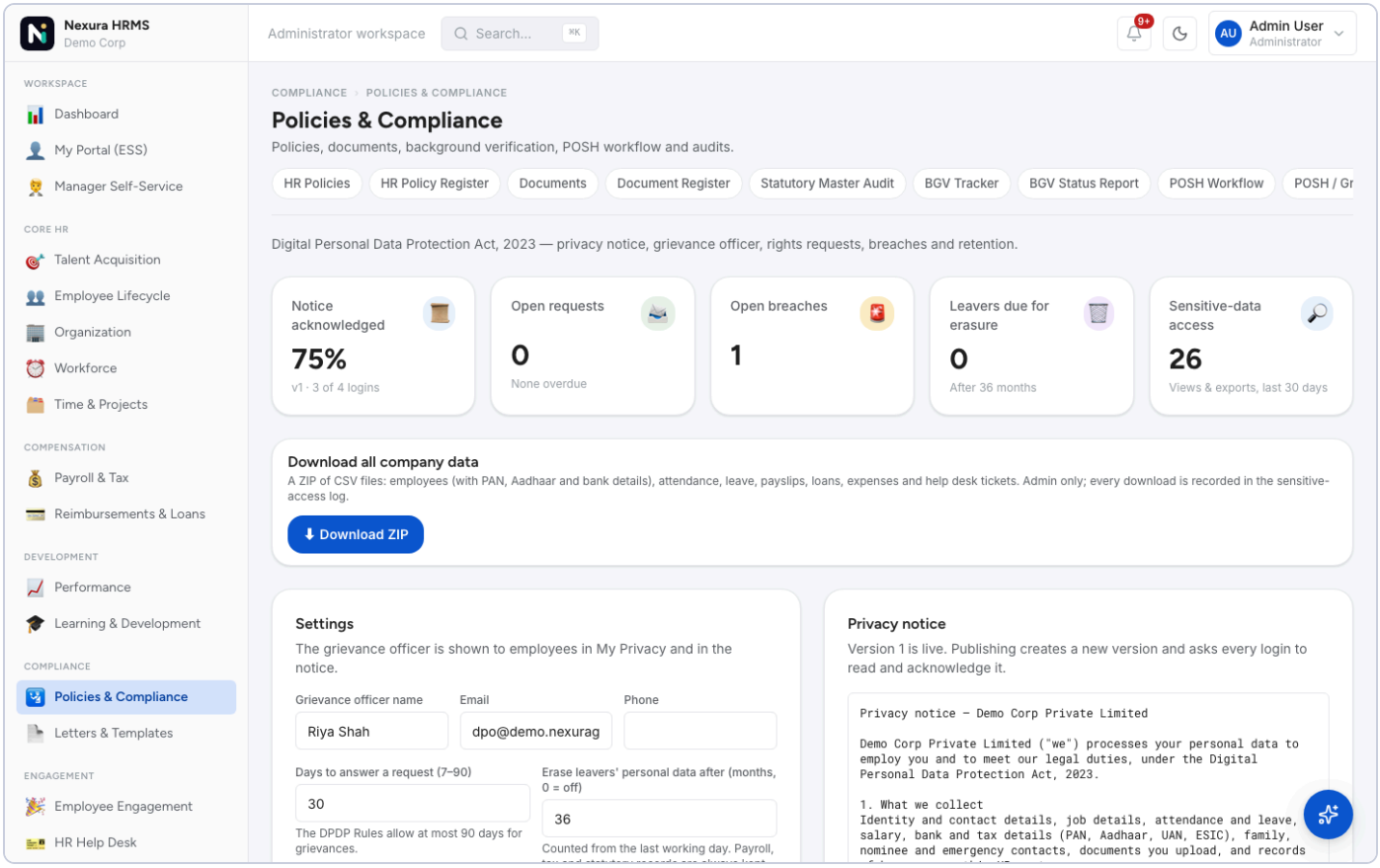
My Privacy

- **Who can use it:** Every signed-in user. You don't need a linked employee record.
- **What it shows:**
  - **Privacy notice:** your company's notice, its version and publish date, and whether you have acknowledged it.
  - **Grievance officer:** name, email and phone, if your company has named one.
  - **Optional uses of your data:** one switch, **Birthday on the celebrations board**.
  - **Download my data.**

    - **Raise a request**, and a **My requests** table with type, raised date, due date, status (Open, In progress, Completed, Rejected), HR's response and the closed date.

- **What you can do:**
    - Click **I have read and understood** to acknowledge the notice.
    - Turn the birthday switch on or off. It is on until you turn it off.
    - Click ⬇ **Download my data** to get a file (JSON) with your account, profile, payslip summaries, leave, attendance summary, document list, consents and privacy requests.
    - Raise a request: **Access my data**, **Correct or complete my data**, **Erase my data**, **Nominate someone** (a person to exercise your rights if you die or become unable to), or **Raise a grievance**.
- **How to raise a request:**
    1. Choose the **Type of request**.
    2. For a nomination, enter the **Nominee's name** and **Nominee's contact**.
    3. Describe your request in **Details** (at least 10 characters).
    4. Click **Send request**. HR is notified, and their reply appears in **My requests**.
- **Good to know:**
    - Your data is used for your employment without needing consent. The birthday switch is the only optional use.
    - When the switch is off, your birthday no longer appears on **Celebrations** or **Anniversaries & Birthdays**. Your work anniversary still does.
    - You can have up to 5 open requests at a time.
    - If you're not satisfied with the reply, you can complain to the Data Protection Board of India.

Privacy Centre (DPDP)



Privacy Centre (DPDP)

- **Who can use it:** Admin and HR can view it. Only Admins can change settings or publish the notice.
- **What it shows:**
    - Tiles: **Notice acknowledged** (% of active logins), **Open requests** (with how many are overdue), **Open breaches**, **Leavers due for erasure** and **Sensitive-data access** (views and exports in the last 30 days). Most tiles open the matching page.
    - **Settings:** grievance officer name, email and phone; **Days to answer a request (7–90)**, default 30; **Erase leavers' personal data after (months, 0 = off)**, up to 120; and **Erase automatically when due**.
    - **Privacy notice:** the current text, ready to edit. If none is published yet, a starting draft is filled in for you.
    - **Not yet acknowledged:** everyone with an active login who hasn't acknowledged the current version.
    - **Download all company data** (Admins only): a button that downloads a ZIP of CSV files with your company's records.
- **How to publish the privacy notice (Admin):**
    1. Fill in the grievance officer details and click **Save settings**.
    2. Read and edit the draft notice.
    3. Click **Publish as version N** and confirm.
    4. Everyone is notified and asked to acknowledge it. Track progress in **Not yet acknowledged**.
- **Good to know:**
    - Each publish creates a new version, and everyone must acknowledge it again.

    - The retention period counts from the last working day. Payroll, tax and statutory records are always kept.
    - **Erase automatically when due** is permanent and can't be undone. Once it's on, Nexura checks every day and erases, without asking you first, the personal data of every former employee whose full & final is paid and whose retention period has ended. The automatic erasure doesn't delete uploaded documents.
    - The starting draft is a template. Have it checked before you publish.
    - **What the company data download contains:** employees (including PAN, Aadhaar and bank details), departments, designations, locations, attendance, leave types, leave requests, leave adjustments and opening balances, payslips and their lines, loans, expenses and help desk tickets, plus a README that lists the row counts. Keep the ZIP safe, because the employee file holds sensitive details.
    - **What it leaves out:** passwords and sign-in secrets, uploaded documents and photos, and the audit log. Each file is cut at 100,000 rows, and the README says if that happened.
    - Only Admins can download it, at most 3 times an hour, and every download is recorded in the **Sensitive Data Access Log**.
    - **Closing your company account and deleting all its data is not done from this page.** You can erase a former employee's personal data from **Data Retention & Erasure**, but deleting the whole company is handled by Nexura on request.

Privacy Requests

- **Who can use it:** Admin and HR.
- **What it shows:** Requests raised from My Privacy, soonest due first, with requester, type, status, raised date and due date. Overdue requests are marked "overdue".
- **What you can do:**
    - Filter: **Open & in progress** (default), **Overdue**, **Open**, **In progress**, **Completed**, **Rejected** or **All**.
    - Click **Handle** (or **View** for a closed request) to open it.
    - Change the status and write a response, then click **Save and notify employee**.
- **How to answer a request:**
    1. Click **Handle**.
    2. Read the details and the hint for that request type.
    3. Do the work. For a correction, update the employee record in the Directory. For a former employee's erasure, use **Data Retention & Erasure**.
    4. Choose **Completed** (or **Rejected**), write your response and click **Save and notify employee**.
- **Good to know:**
    - You need a response to complete or reject a request.
    - Completed and rejected requests are final. The employee can raise a new one.
    - You can't handle your own request. Another Admin or HR user must.
    - Admin and HR get a daily notification while any request is overdue.
    - For an access request, the employee can already download their own data from My Privacy.

Data Breach Register

- **Who can use it:** Admin and HR.
- **What it shows:** A short guide to what the rules require after a breach, and a list of incidents with severity, detection time, status and pending steps. Opening an incident shows a countdown to the 72-hour deadline for the detailed report to the Data Protection Board.
- **What you can do:**
    - Record a breach.
    - Record when each required step was done, and add remediation notes.
    - Close an incident once all three steps are recorded.
- **How to record and close a breach:**
    1. Under **Record a breach**, enter a **Title**, **What happened** and **Detected at (IST)**. Add severity, data affected and an approximate number of people affected if you know them.
    2. Click **Record breach and alert Admins/HR**.
    3. Click **Update** on the incident. As you complete each step, enter its date and time: **Board intimated**, **Affected people informed** and **Detailed report sent**. Click **Save**.
    4. When all three are recorded, click **Save and close incident** and confirm.
- **Good to know:**
    - Nexura doesn't contact the Board or the affected people for you. You record what you did.
    - Admin and HR get a reminder each day while steps are pending.
    - A recorded date can be corrected but not removed. Closed incidents can't be edited.

Data Retention & Erasure

- **Who can use it:** Admin and HR.
- **What it shows:** Former employees (Resigned or Terminated) with last working day, full & final status, the date they become due for erasure, and whether they can be erased now. A panel explains what erasure removes and what it keeps.
- **What you can do:**
    - Switch between **Not yet erased** and **All former employees**.
    - Click **Erase…** for someone marked "Can be erased".
- **How to erase a former employee's personal data:**
    1. Click **Erase…** on the row.
    2. Type the employee code to confirm, and give a reason.
    3. Tick **Also delete their uploaded documents** if you want that too.
    4. Click **Erase permanently**.
- **What erasure removes:** photo, marital status, mobile, personal email, blood group, Aadhaar, bank details, family details, emergency contact and insurance nominee. Their login is deactivated and signed out, and their two-step setup, phone alerts and consents are removed.
- **What erasure keeps (required by law):** name and employee code, father's or husband's name as on statutory registers, gender, date of birth, dates of joining and leaving, PAN, UAN, ESIC number, salary, payslips, payroll runs, tax declarations, TDS, Form 16, full & final settlement and statutory PF, gratuity and ESI nominations.
- **Good to know:**
    - Erasure is permanent and can't be undone.

    - Someone can be erased only after their last working day has passed and their full & final settlement is paid. The Eligibility column says why if not.
    - You can't erase your own data. A login that belongs to an active Admin, or that was used after the last working day, must be deactivated first.
    - You can erase manually even when no retention period is set.

Sensitive Data Access Log

- **Who can use it:** Admin and HR.
- **What it shows:** Who viewed or exported sensitive personal data, and every other privacy event: erasures, request updates, notices, consents and breaches. Each row shows when, who, the event, what was opened, view or export, and how many records.
- **What is logged as a view or export:** opening the employee Directory, Statutory Master Audit, Salary Bank Advice, Tax Declarations, Statutory, Form 16 and TDS Returns pages, and downloading payroll registers, bank files, PF ECR and statutory files, Form 16 and full & final PDFs, an employee's own data download, and this log's Excel download.
- **What you can do:**
    - Filter by **Event**, **From** and **To**, then click **Filter**.
    - ⬇ **Export Excel**.
- **Good to know:** It shows the last 30 days by default, and at most 12 months at a time. Repeat page views by the same person within 10 minutes are logged once.

Approvals for pay changes, job offers and reporting changes

Salary revisions, promotions and job offers now go through approval chains, like leave and expenses. An HR user's change to an existing employee's manager or department now waits for an Admin.

Approval Workflows / Workflow Rules

- **Who can use it:** Admin and HR. HR finds it as Workforce → **Approval Workflows**; Admins also see it as System Administration → **Workflow Rules**.
- **What's new:**
    - Four more modules: **Salary revision**, **Promotion**, **Job offer** and **Org change** (manager or department change).
    - New conditions:
        - Salary revision and Promotion: **Increase at least / at most (%)** and **New annual CTC at least / at most (₹)**.
        - Job offer: **Offered annual CTC at least / at most (₹)**, plus department and location, taken from the offer's job opening.
    - **Test the rules** works for these modules. For a job offer you pick a job opening department and location instead of an employee.
- **Built-in chains when no rule matches:**
    - Salary revisions, promotions and job offers: one step, any HR or Admin user.
    - An HR user's manager or department change: one step, any Admin.
- **Good to know:**

- Only Admins can create, edit, pause, delete or convert rules for these four modules. HR sees them marked "Admin only".
- When a pay or offer rule uses the "Department head" step, only Admins can change department heads.
- Everyone can delegate their own approvals. Only an Admin can set up or end a delegation for someone else.
- The increase is measured against the CTC on the employee's record. If the CTC or increase is unknown, CTC and increase conditions count as matched, so the stricter rule applies.
- Nobody can approve a change to their own pay. Nobody approves their own request.
- If you raised a salary revision, promotion or job offer for someone, another approver or an Admin must decide it. You can decide it yourself only when nobody else in the company can (for example, a company with a single Admin).

Revisions

- **What's new:**
  - A new revision always starts as **Proposed** and goes into its approval chain. The add form no longer has a Status box.
  - Each revision in a chain shows its position, for example "Step 1 of 2 · HR / Admin". Click it to see the approval trail.
  - Approvers approve or reject in **Pending Approvals**. Choosing Approved or Rejected in the row's status drop-down also records your decision, if you are the current approver.
  - After final approval, set the status to **Effective** here, as before.
- **Good to know:**
  - While a revision is waiting for approval you can't change it. Withdraw it and propose a new one.
  - After it is decided, you can't change the employee, the CTC or the status, except Approved → Effective.
  - The person who proposed it is told the outcome. The employee is told when it is approved (see below).
  - An Admin can decide any revision, even when not in the chain. HR can decide only when they are an approver on the current step.

Promotions

- **What's new:** The same rules as Revisions. A new promotion starts as **Proposed**, goes through its chain, and you set it to **Effective** here after final approval. Effective still updates the employee's designation, grade and CTC.

Team Comp Plan and Promotion Cases

- **What's new:** A manager's nomination now goes into the approval chain straight away (by default, any HR or Admin user). If the manager withdraws it while it is still Proposed, its approval is cancelled.

Offers

- **What's new:** An offer is approved before it is released to the candidate.
- **How to release an offer:**
    1. Click **New Offer**, fill in the details, and choose **Draft (save only)** or **Submit for approval** in Status.
    2. For a draft, click **Submit for approval** on its row when ready.
    3. The offer shows **Awaiting approval** and its step. Approvers decide in **Pending Approvals**.
    4. On final approval, the offer moves to **Pending** (sent to the candidate). The person who submitted it is notified of the outcome.
    5. When the candidate responds, change the status to Accepted or Rejected, as before.
- **Good to know:**
    - The offered CTC must be readable to submit, for example "24 LPA", "18L", "1.2 Cr" or "₹24,00,000".
    - While an offer is awaiting approval, you can't edit it. You can only **Withdraw** it.
    - A draft can only be submitted for approval or withdrawn.
    - If an approver rejects it, the offer goes back to Draft, marked "Not approved — edit and resubmit".
    - Changing the candidate, job, role or CTC of a released offer sends it back to Draft for approval.
    - **Make Offer** on the Candidate Database page has the same two choices: **Draft (save only)** or **Submit for approval**.

HR changes to a manager or department

- **Who it affects:** HR users editing an existing employee. Admins' changes apply straight away.
- **What happens:**
    - When HR changes an existing employee's **Reporting Manager** or **Department** in the Directory, the other changes save at once. The manager or department change goes to an Admin. HR sees "Saved. Manager/department change sent to Admin for approval."
    - The Directory shows "Pending Admin approval: …" under that employee until an Admin decides.
    - When HR sets an **Inter-Department** transfer to Effective, it is saved as Approved and marked "Department change waiting for Admin". It becomes Effective when an Admin approves it. If the Admin rejects it, the transfer is rejected too.
    - Admins approve or reject in **Pending Approvals**, under "Org changes". The HR user is notified either way.
- **Good to know:**
    - New employees, whether added one at a time or by bulk upload, are not affected.
    - An employee has only one pending change at a time. A newer change replaces the older one.
    - When the Admin approves, Nexura checks again that the new manager is still active, that no reporting loop forms, and that nobody changed the manager or department in the meantime. If any check fails, the request is cancelled and HR is told why.
    - The HR user who asked can never approve or reject their own change.

Pending Approvals / Approval Inbox

- **What's new:**
    - New tiles appear when you have them waiting: **Salary revisions**, **Promotions**, **Job offers** and **Org changes**.
    - The first column is now **Employee / candidate**. Job offers show the candidate's name.
    - The details line shows the change, for example the old and new CTC and the increase %.
- **Good to know:** Pay changes and offers reach you only when you are an approver on the current step, or a delegate for one.

Approval trail

- **What's new:** The trail of a salary revision, promotion, job offer or org change is not shown to the employee it is about. The person who submitted it, the approvers, the employee's manager, HR and Admin can see it.

Notifications when a raise or promotion is approved

- **Who gets them:** The employee concerned, if they have a login.
- **What they say:** "Your salary revision has been approved, effective [date]." or "Your promotion to [designation] has been approved, effective [date]." Neither shows any amount.
- **Good to know:** Employees are not notified when a revision or promotion is rejected.

Master Data: departments in use

- **What's new:** Each department shows how many employees it has. A department with employees, or with a pending department change, shows **In use** instead of **Del**. To retire it, click **Edit** and untick Active.

Tax declarations and TDS returns: what's new

The earlier chapters already describe My Tax Declaration, Tax Declarations and TDS Returns. These are the additions.

My Tax Declaration

- **What's new:**
    - **House rent:** choose the city for each rent period. The page shows whether it counts as a 50% city or 40% (other city). From Tax Year 2026-27, eight cities count at 50%: Delhi, Mumbai, Kolkata, Chennai, Bengaluru, Hyderabad, Pune and Ahmedabad. Earlier years use the first four.
    - **Landlord PAN** is needed if your rent is above ₹1 lakh a year. **Lender PAN** can be added on home-loan and education-loan lines.
    - **80C:** your PF for the year is shown automatically.
    - **Health insurance (80D):** tick "I or my spouse am 60 or older" or "A parent is 60 or older" for the higher limits.
    - **Employer NPS:** recorded only. It doesn't change your salary or TDS here, and HR will confirm it.

    - **Donations (80G):** pick the deduction type, payment mode, and the donee's name and PAN. Cash donations above ₹2,000 aren't deductible.
    - **Interest income:** under the Old regime, the interest you declare is added to your income and the deduction is then allowed against it.
    - **Previous employer:** enter Employer name, Employer TAN, the last month paid there, and the salary and TDS.

Tax Declarations

- **What's new:**
    - **Verify & add to TDS** for previous-employer details is refused if HR has already entered previous-employer figures for that employee and year on the TDS page. Reconcile them there first.
    - The regime is stored for each year, so changing it this year doesn't change past years' Form 16.
    - From Tax Year 2026-27, labels follow the Income-tax Act, 2025: the declaration is Form 124, previous-employer details Form 122 and the salary certificate Form 130.
    - Opening this page is recorded in the Sensitive Data Access Log.

TDS Returns (24Q / 138)

- **What's new:**
    - For Q4, the Annexure II salary details now come from employees' tax declarations, including home-loan interest as a house-property loss and every Chapter VI-A deduction.
    - Landlord and lender PANs come from the declarations into the Q4 file and review workbook, up to four of each per employee.
    - Pre-flight now blocks Q4 when an employee claims HRA on rent above ₹1 lakh a year without each landlord's PAN and name, or claims home-loan interest without each lender's PAN and name. Add them on the employee's tax declaration, or enter them in the Return Preparation Utility (RPU).
    - Opening this page is recorded in the Sensitive Data Access Log.
- **Good to know:** Form 138 Q4 still has no text file. Use the review workbook.

Simpler sign-in and logins

Sign in with an emailed code

- **Who can use it:** Employees and Managers.
- **What's new:** a **Email me a sign-in code** button on the sign-in page. Type your work email and the 6-digit code from your inbox. No password needed.
- **Your employee list is your login list:** an employee who has never signed in gets a login the first time they use a code. It's linked to their employee record, with the Manager role if anyone reports to them, otherwise Employee. HR and Admins get a "New login created" notification.
- **Good to know:** HR and Admin keep password sign-in, plus two-step if set up. See Part A, section 2.7.

Users & access: employee record link

- **What's new:** an **Employee record** column and picker. New logins link automatically to the employee with the same email, and an amber **Not linked — link** marks any that aren't linked.

Former employees can't sign in

- **What's new:** once an employee is **Resigned** or **Terminated**, their Employee or Manager login stops working (password and emailed code) and they're signed out everywhere.

Get your company ready

- **Who can use it:** Admin.
- **What's new:** a setup checklist on the Dashboard for new companies. Each step ticks itself off, and the card disappears once everything is done.

Roles and access

- **What's new:** give people part of HR, such as payroll only or recruitment only, with ready-made roles or ticked modules. See **Users & access** and **Roles** in Part B.

Downloads in Excel

- **What's new:** reports, registers and exports now download as Excel (.xlsx) files: the ⬇ **Excel** buttons. Bulk-upload templates are Excel files too. Uploads accept .xlsx, and .csv still works.
- **In the Excel files:** the header row is bold and stays in view as you scroll, amounts are real numbers you can add up, and codes and account numbers keep their leading zeros.
- **Kept in their required formats:** the bank file, the ESI return and the PF ECR (for upload to your bank and the government portals), Tally (XML), and **Download all company data** (a ZIP of CSV files, for moving your data to another system).

Other changes

Employee bulk upload

- **Who can use it:** Admin and HR.
- **What's new:**
    - A tick box, **Create missing departments, designations, locations, grades and cost centres**. It is ticked by default for a new company that has none of these lists yet.
    - Before anything is saved, the preview lists what **Will create** and any **Please check** warnings, such as "New department 'Enginering' — did you mean 'Engineering'?". Warnings don't block the import.
    - Names are matched ignoring capital letters and extra spaces. Cost centres match by code or name.
    - **Manager (Employee ID)** can be an existing employee or another row in the same file.
    - Dates use the Indian format, **DD/MM/YYYY** (for example 01/04/2026 for 1 April 2026).
- **How to:**
    1. Click ↑ **Bulk upload** and ↓ **Download Excel template**.

2. Fill it in and upload it.
3. Tick or untick the create-missing box. The preview refreshes.
4. Check **Will create** and **Please check**, then click **Import N valid rows**.

- **Good to know:**
  - New cost centres keep a short code-like value (for example CC01) as their code. Otherwise they get CC-001, CC-002 and so on.
  - Rows where someone reports to themselves, or managers form a loop, are rejected. If a manager's own row has errors, the people reporting to them are skipped too.
  - Dates are also accepted as YYYY-MM-DD, 01-Apr-2026 or a normal Excel date. A date like 04/01/2026 always means 4 January, never April 1. Dates before 1950 or more than a year ahead get a warning.
  - The same date rules apply to the attendance bulk upload and the opening figures import on the TDS page.

Nexura logo

- The Nexura logo now appears in the sidebar, on the sign-in, sign-up, password reset and two-step setup pages, and as the browser tab icon.

Pages listed under two menus

- **Pending Approvals** (Manager Self-Service) and **Approval Inbox** (Workforce) are the same page. So are **Approval Workflows** (Workforce) and **Workflow Rules** (System Administration). The page now stays under the menu you opened it from, so the header, tabs and sidebar don't jump to the other menu.