Attendance Management

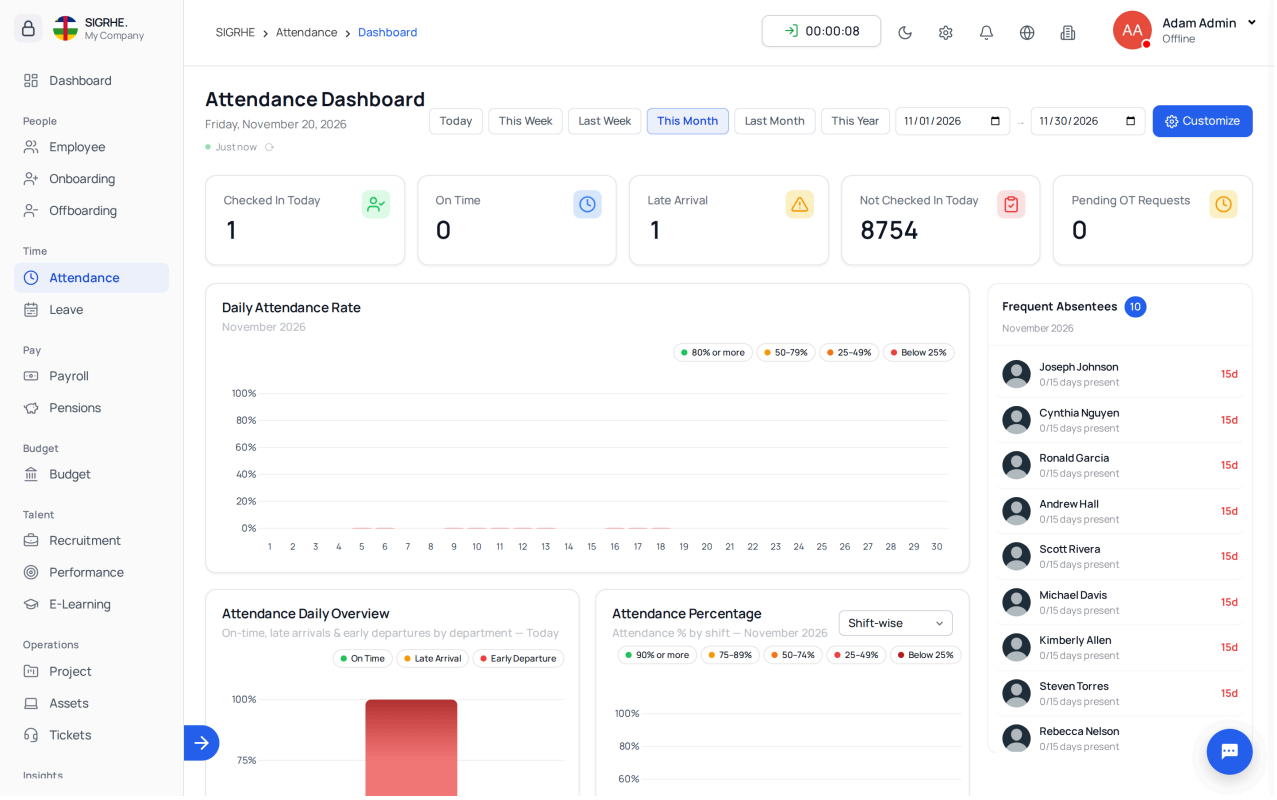
The Attendance Management module in NKL-HR allows organizations to record employee presence, automate record validation, manage overtime authorizations, monitor punctuality, and produce monthly reconciliation summaries.

1. Prerequisites & Setup Order

Attendance metrics are evaluated strictly against scheduled shift parameters. Before opening attendance logging:

1. **Configure Shifts & Schedules:** Define weekday start times, end times, and minimum expected hours under `Employee → Configuration`.
2. **Assign Employee Shifts:** Ensure every active employee profile has a valid assigned shift in their work information.
3. **Establish Company Calendars:** Set weekly off days under `Settings › Organization › Weekly Off Days` and statutory holidays under `Leave › Public Holidays`.
4. **Define Policies:** Configure grace periods and validation thresholds under `Attendance › Time Policies` and toggle clock-in behavior under `Settings › Attendance › Attendance Rules`.

2. Menu Overview

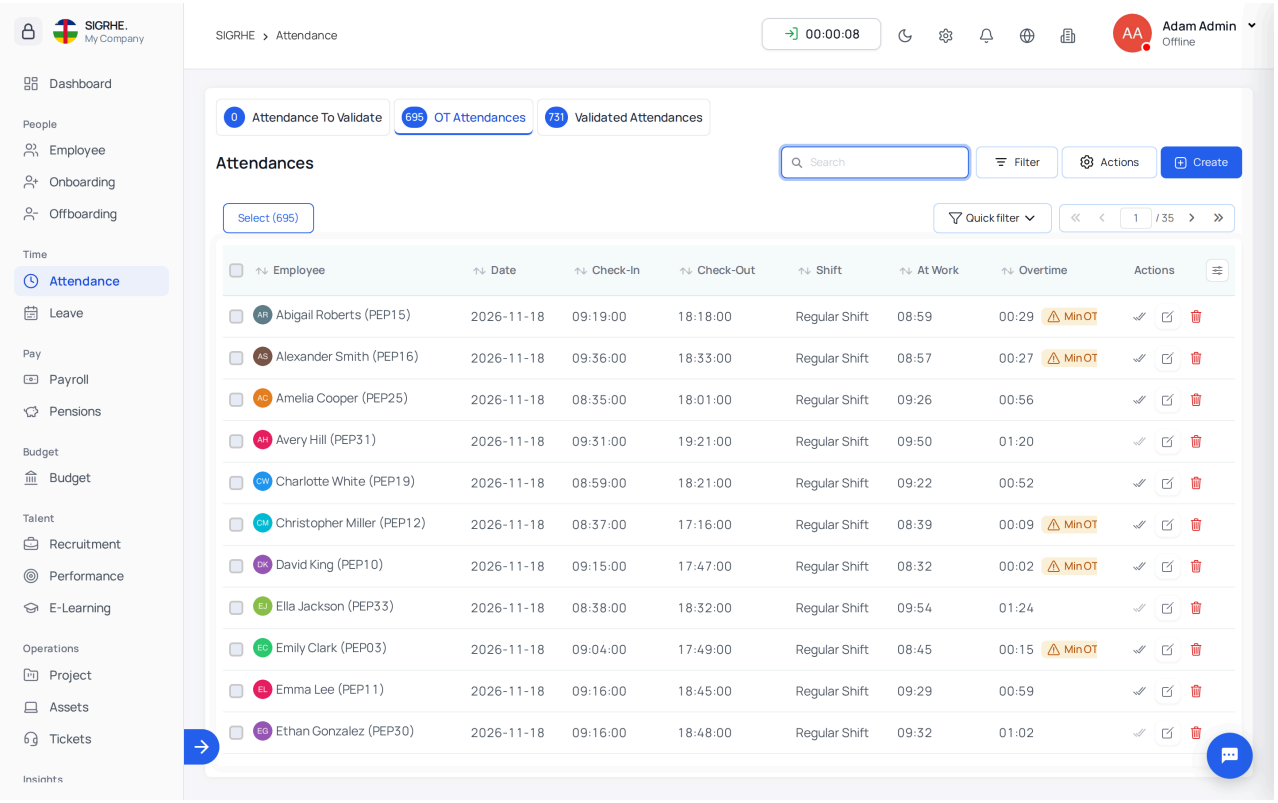


MENU	PURPOSE
Dashboard	Real-time overview of today's attendance, staff on breaks, active overtime hours, and records pending validation. Click any tile to inspect the filtered records.
My Attendances	Self-service interface for individual employees to review their historical attendance entries.
Attendances	Administrative directory of all attendance entries: validate daily logs and approve overtime hours.
Attendance Requests	Workflow queue for reviewing employee correction requests and missing punch regularizations.
Check-in / Check-out Log	Granular raw timestamp log of every individual clock-in and clock-out event.
Late Arrival & Early Departure	Automated log of tardy check-ins and premature departures, including associated penalty assessments.
Monthly Summary	Comprehensive monthly reconciliation grid featuring conflict resolution and manual hour overrides.
Time Policies	Grace period rules and automated attendance validation parameters.

Attendance entries originate from web-based Check-In / Check-Out buttons, synchronized biometric hardware, manual administrative creation, spreadsheet imports, or approved attendance correction requests.

3. Validating Attendance

Navigation: `Attendance → Attendances`



The Attendances view organizes records into three functional tabs:

- **To Validate:** Contains entries requiring administrative review (e.g., incomplete punch logs, hours falling outside automated parameters). Review individual records and click **Validate**, or multi-select entries to execute bulk validation.
- **Overtime:** Contains validated attendance records featuring worked hours that exceed shift minimums.
- **Validated:** Archives all confirmed, error-free attendance records ready for monthly reconciliation.

> **Automated Validation:** Records meeting the criteria established in **Time Policies** validate automatically without manual administrative intervention.

---

4. Overtime Approval

Navigation: `Attendance → Attendances → Overtime`

Overtime hours count towards employee compensation and time accounts only after formal administrative approval.

- Review overtime entries individually or approve eligible records in bulk.
- When an **Overtime Cut-off** threshold is configured, hours recorded above the cut-off ceiling are automatically capped.

- Overtime accumulated below the configured **Minimum overtime to approve** threshold is discarded.

---

5. Adding, Importing & Exporting Attendance

Navigation: `Attendance → Attendances`

- **+ Create:** Manually log attendance for a single employee by specifying date, shift, work type, clock-in time, and clock-out time.
- **Batch Attendance:** Create identical attendance logs for multiple employees simultaneously under a shared batch identifier.
- **Import:** Upload daily attendance logs or regularization spreadsheets. The system validates entries and generates an error report for invalid rows so they can be corrected and re-uploaded.
- **Export:** Download filtered attendance logs into customizable spreadsheet reports.

---

6. Attendance Requests & Corrections

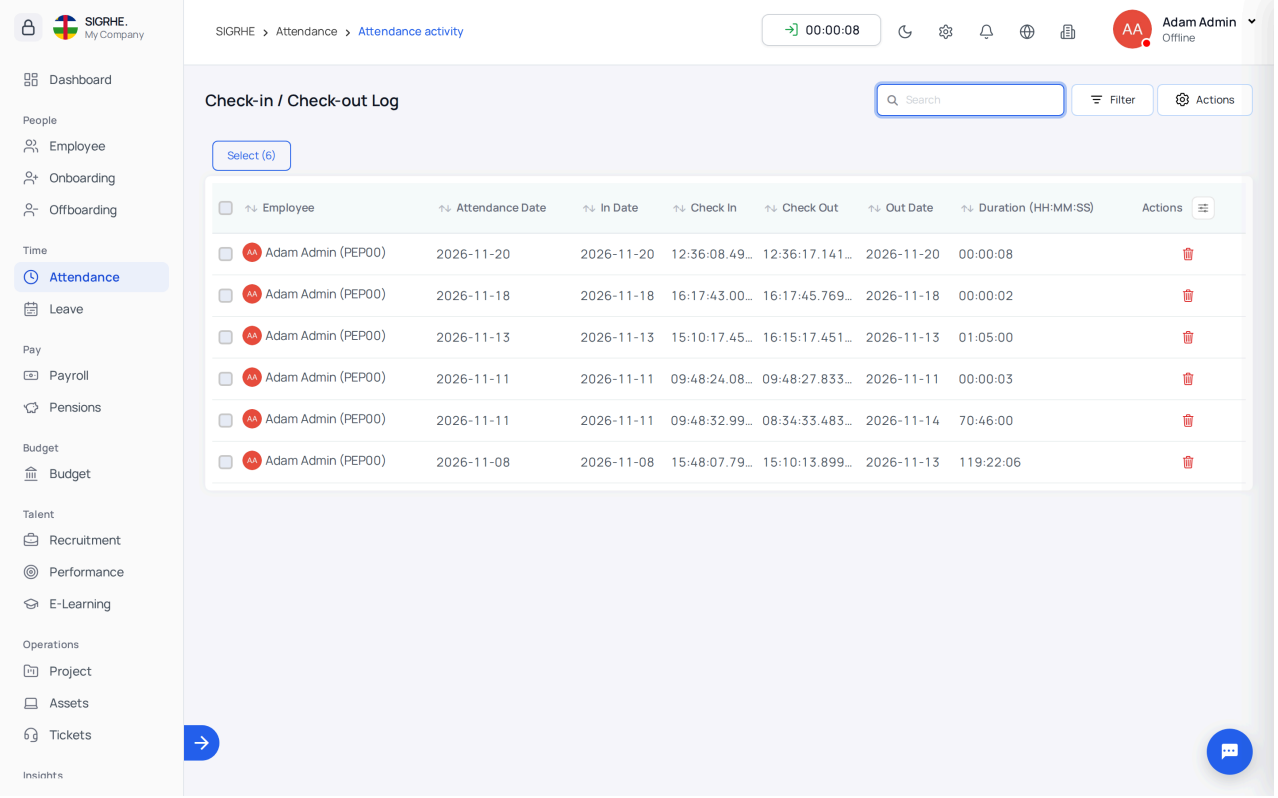
Navigation: `Attendance → Attendance Requests`

Employees can submit regularization requests when they forget to clock in or require time adjustments.

- **Create Request:** Submits attendance for a date with no existing record.
- **Update Request:** Proposes corrections to an existing attendance record, displaying proposed changes alongside current recorded values.
- **Review Workflow:** Open the request to inspect justification notes and attachments. Click **Approve** to update the official attendance record, or **Reject** with a mandatory explanation.

---

7. Check-in / Check-out Raw Log

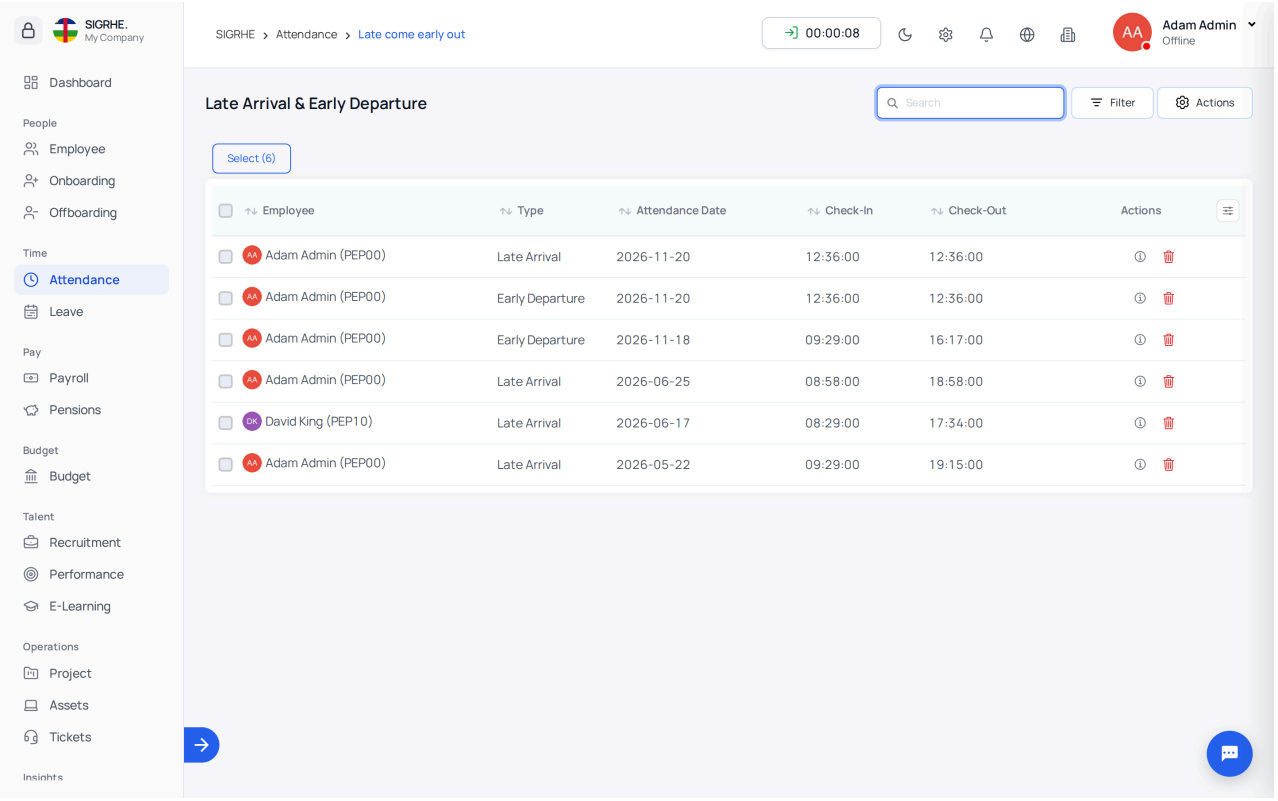


Navigation: `Attendance → Check-in / Check-out Log`

Provides a raw audit trail of every check-in, check-out, and break punch event. Useful for investigating disputed records or resolving discrepancies caused by network latency or biometric sync delays.

---

8. Late Arrivals & Early Departures



Navigation: `Attendance → Late Arrival & Early Departure`

When tracking is active, the system automatically registers records that commence after the scheduled shift start time or terminate prior to the scheduled shift end time.

- Punctuality tolerances are controlled by configured **Grace Times**.
- Filter entries by employee, date range, department, or infraction type.
- **Penalties:** Administrators can levy administrative penalties directly against late or early departure entries (e.g., leave balance deductions or salary deductions).

---

9. Time Policies

Navigation: `Attendance → Time Policies`

Grace Times

Defines allowable arrival and departure flexibility before an entry is flagged as late or early:

FIELD	DESCRIPTION
Allowed Time	Duration threshold specified in `HH:MM:SS` (e.g., `00:10:00` for 10 minutes).
Allowed Clock-In / Clock-Out	Specifies whether tolerance applies to check-in, check-out, or both.
Default	Sets the default grace policy applied to shifts lacking a dedicated rule.
Shifts	Links the grace rule to designated shift schedules.

Validation Conditions

Configures rules that govern automated attendance confirmation and overtime qualification:

FIELD	DESCRIPTION
Minimum Hours to Auto Validate	Records meeting or exceeding this threshold validate automatically.
Worked Hours Auto Approve Till	The upper worked-hour boundary for automated validation.
Minimum Overtime to Approve	Excess hours below this duration are not considered eligible overtime.
Overtime Cut-off	The maximum overtime duration allowed per calendar day.

FIELD	DESCRIPTION
Auto Approve OT	Automatically approves eligible overtime hours without manual review.
Shifts	Restricts rules to specific shifts (leave blank to apply globally).

10. Attendance Rules & System Settings

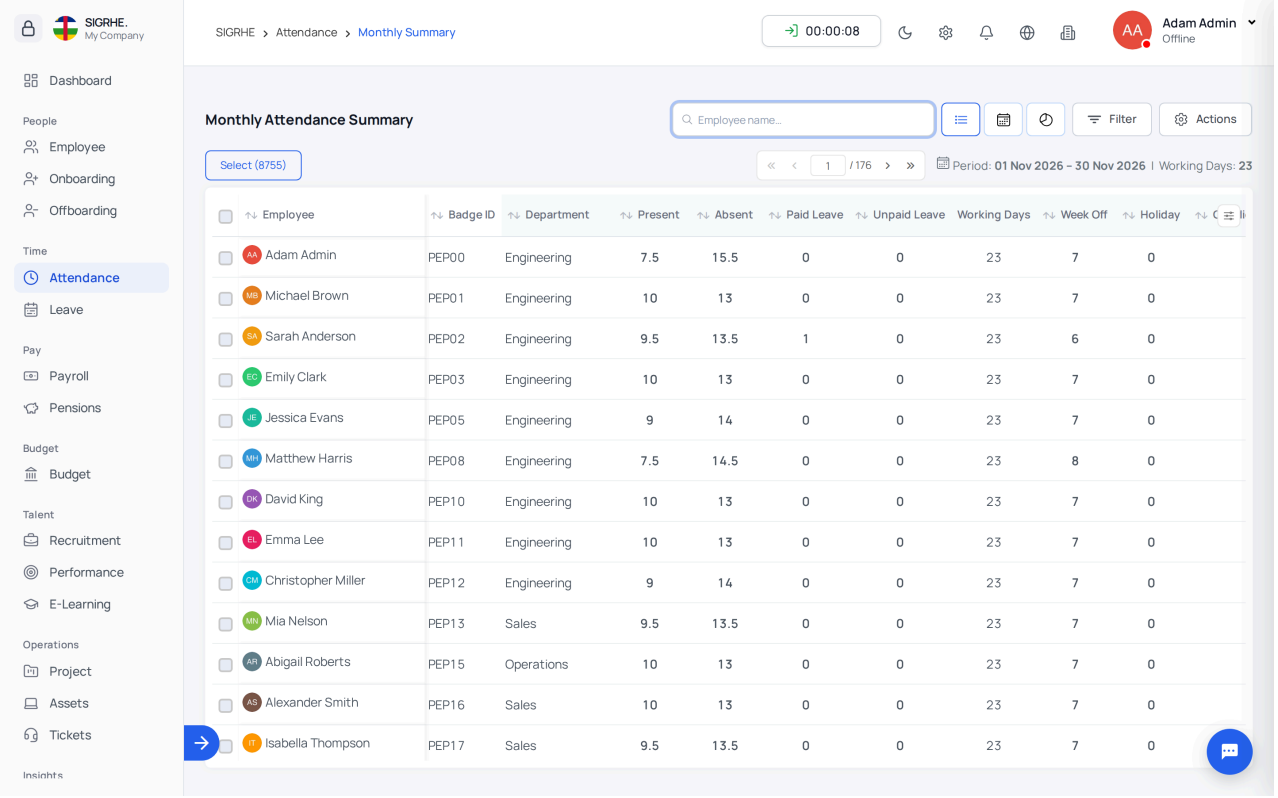
Navigation: `Settings › Attendance › Attendance Rules`

SETTING	EFFECT
Enable Check In / Check Out	Activates the interactive clock-in/out button across user portals.
At-Work Tracker	Renders a live real-time elapsed workday counter inside the clock-in button.
Track Late Arrival & Early Departure	Automatically records tardiness and early departures against shift schedules.
IP Login Restriction	Restricts check-in capabilities strictly to whitelisted corporate IP addresses.
Biometric Attendance	Enables synchronization with on-premises biometric hardware (requires Biometric module).
Face Detection	Requires facial recognition verification upon clock-in (requires Face Detection module).
Geofencing	Restricts mobile attendance check-ins to authorized geographic coordinate radiuses (requires Geofencing module).

> **Note on Policies:** Grace times, minimum working hours, and validation criteria are configured under `Attendance › Time Policies`.

11. Monthly Summary & Conflict Resolution

Navigation: `Attendance → Monthly Summary`



The Monthly Summary provides a monthly reconciliation matrix detailing total days present, half-days, absences, approved leaves, public holidays, weekly off days, total hours worked, and overtime accumulated. Toggle between the summary overview and the **Daily View** grid.

Resolving Attendance Conflicts

A **conflict** occurs when an attendance record overlaps with an approved leave request, holiday, or off day, or when records are incomplete. Conflicting cells are highlighted on the monthly grid.

1. Click the highlighted entry or launch the **Bulk Resolve** drawer.
2. Select the final reconciled status:
    - **Full Present**
    - **Half Day**
    - **Half Absent**
    - **Partial Hours**
    - **Absent**
    - **Paid Leave**
    - **Unpaid Leave**
    - **Holiday**
    - **Week Off**

Overriding Hours & Regularization

- **Override Hours:** Allows administrators to manually adjust the employee's total accumulated hours for the pay cycle. Overridden hours are protected against automated recalculation.
- **Regularise:** Confirm individual day statuses from the calendar popover. All conflicts should be fully resolved prior to processing payroll disbursements.

Last updated: 10/24/25, 2:58 PM

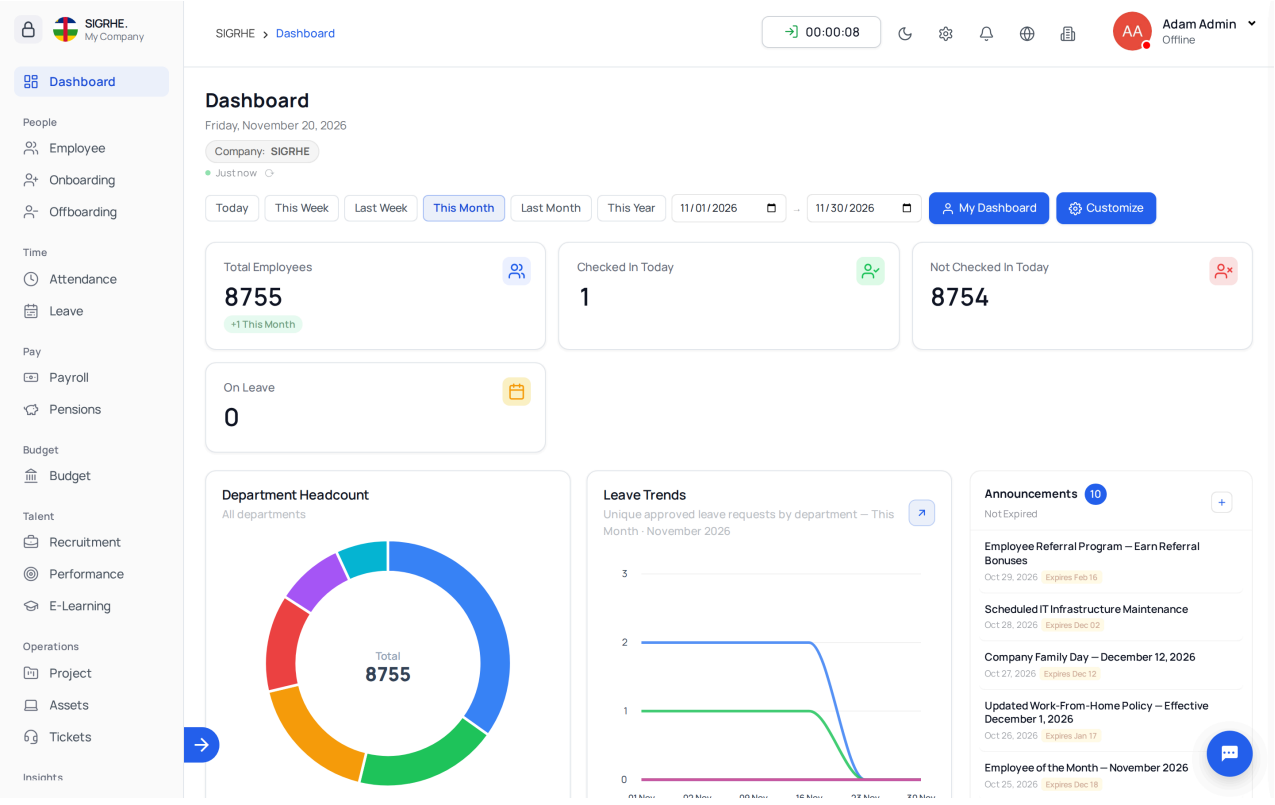
Previous page
Deductions

Next page
Leave

Dashboard

The NKL-HR HRMS Dashboard serves as the operational headquarters for administrators, department managers, and HR staff. It delivers visual summaries, active indicators, and shortcut actions to manage daily personnel tasks across all active modules.

Centralized Overview



The dashboard interface consolidates real-time information from workforce records, attendance logging, leave approvals, onboarding pipelines, and offboarding workflows.

Key Metrics & Visual Analytics

- **Headcount Metrics:** Real-time counts of active employees segmented by department, job position, and employment type. Unassigned employees appear under *Unassigned*, helping administrators quickly locate and complete incomplete profiles.
- **New Joiners:** Summary cards displaying new employees who have joined recently or completed the onboarding portal.

- **Document Expiries:** Proactive alerts identifying employee documents approaching expiration (e.g., certifications, work permits, identifications).
- **Pending Request Counters:** Actionable counters displaying pending requests for:
  - Shift requests and work type adjustments
  - Attendance regularizations and overtime approvals
  - Leave requests and leave allocation adjustments
  - Resignation and exit process decisions

Module-Specific Dashboard Views

Each major HRMS module within NKL-HR provides tailored dashboard metrics:

1. Employee Dashboard

Provides high-level visibility into company demographics, active versus archived personnel, pending profile updates, and active disciplinary measures or suspensions.

2. Attendance Dashboard

Highlights real-time workforce availability:

- Employees currently checked in, on break, or absent
- Overtime records requiring administrative or managerial validation
- Late arrivals and early departures recorded for the day
- Unresolved monthly summary conflicts requiring reconciliation before payroll

3. Leave Dashboard

Visualizes time-off distribution across teams:

- Personnel currently on leave and scheduled upcoming absences
- Departmental leave trends and pending leave approvals
- Leave clash warnings indicating simultaneous absences within the same department

4. Onboarding Dashboard

Tracks hired candidates transitioning into the organization:

- Candidates distributed across onboarding stages (e.g., Initial, Document Collection, IT Setup)
- Real-time status of checklist tasks (Todo, Scheduled, Ongoing, Stuck, Done)
- Quick-filter links to immediately inspect and unblock stuck onboarding tasks

5. Offboarding Dashboard

Monitors active exit processes and leavers:

- Leavers categorized by stage and exit process
- Outstanding handover and full-and-final (FnF) settlement tasks
- Retained company assets or unresolved managerial responsibilities needing handover

---

Quick Navigation & Responsive Actions

Clicking any metric card, chart element, or pending counter on the dashboard automatically redirects to the relevant module list pre-filtered to the matching records, allowing rapid resolution of operational bottlenecks.

Last updated: 10/24/25, 2:58 PM

Previous page
Introduction

Next page
Recruitment

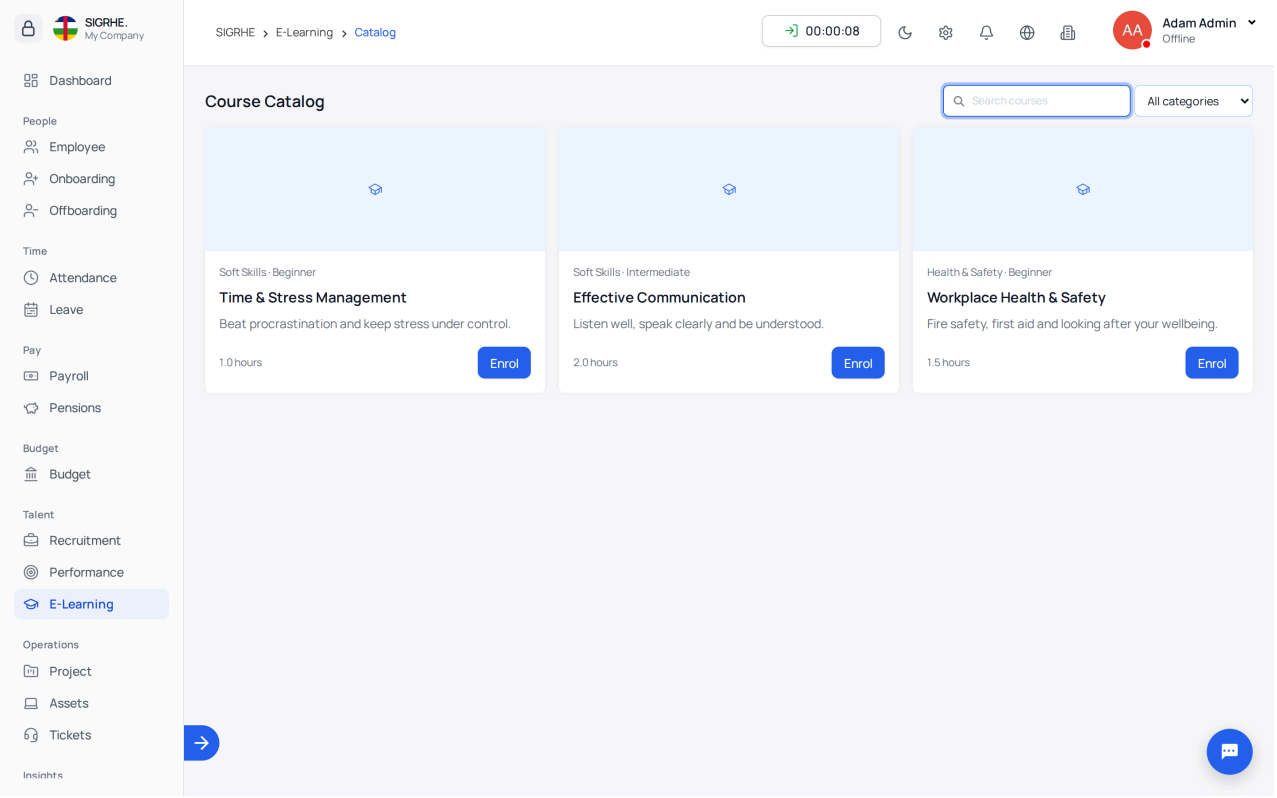
E-Learning Management

The E-Learning module in NKL-HR allows organizations and ministries to build structured training curricula, deliver multimedia course content, administer quizzes and assessments, track learner progress, and issue verifiable digital certificates.

1. Prerequisites & Setup Order

- **Ministry Scoping:** Courses, categories, certificate templates, assignments, and enrolments are scoped to the active ministry or company. Confirm the correct entity is selected in the company switcher before authoring content.
- **Course Categories:** Define category classifications under `Settings → E-Learning → Course Categories` to organize courses in the public catalog.
- **Certificate Templates:** Establish default certificate templates under `Settings → E-Learning → Certificate Templates` if custom branding is preferred over the default template.

2. Menu Overview



MENU	PURPOSE
My Learning	Individual learner dashboard showing personal course enrolments, active progress, and pending deadlines.
Course Catalog	Public directory of published courses offering self-enrolment for authorized personnel.
My Certificates	Personal archive of earned, downloadable, and verifiable course completion certificates.
Courses	Administrative authoring interface to create, structure, edit, and publish courses.
Assignments	Curriculum distribution tool to assign mandatory courses to employees, departments, or job positions.
Enrollments	Central monitoring console tracking learner completion rates, statuses, and overdue progress.

3. Course Structure & Architecture

A course is structured hierarchically into **Sections**, with each section containing an ordered sequence of **Lessons**. Lessons can be designated as **Required** or **Optional**.

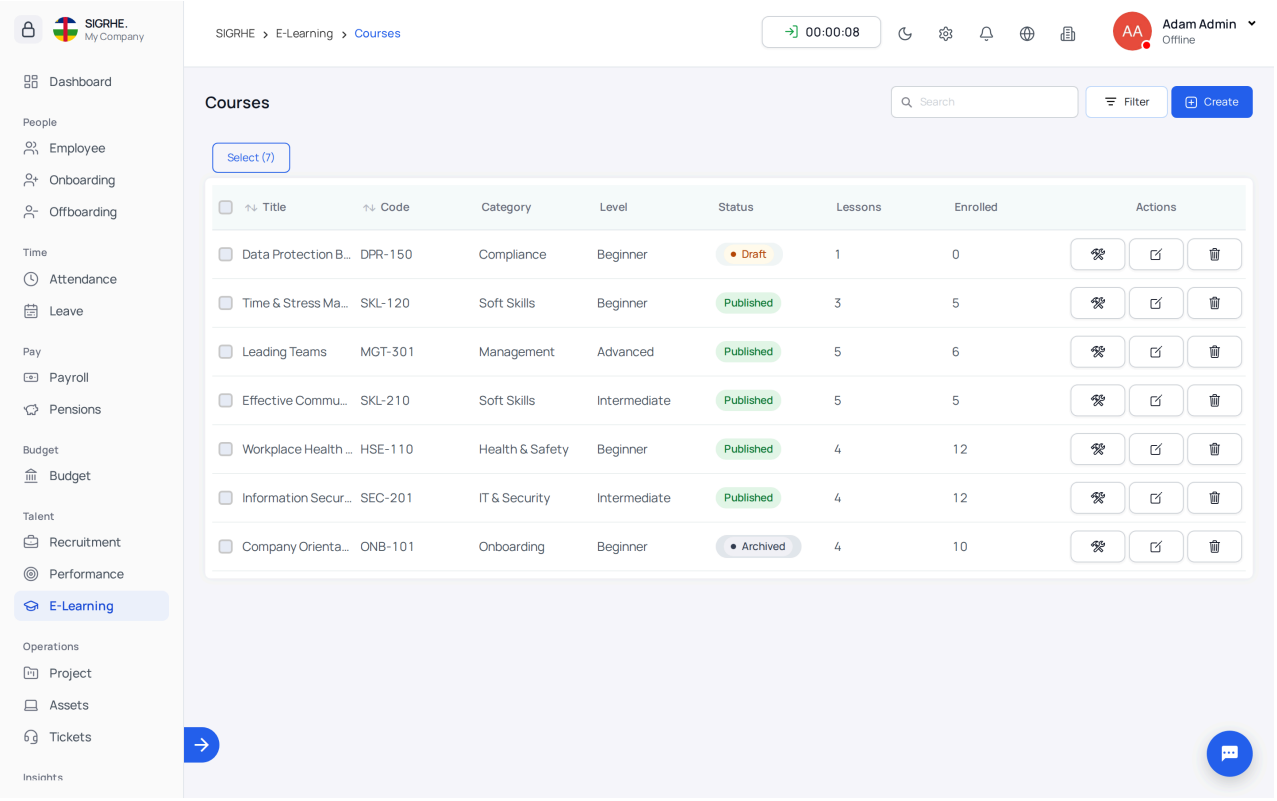
Supported Lesson Types

- **Video:** Embed streaming content directly by providing YouTube or Vimeo URLs or embed codes.
- **File:** Upload documents and media (PDFs, audio, video, images) up to 50 MB. Executable binaries and scripts (`.html`, `.js`, `.exe`, `.svg`) are rejected for security.
- **Text:** Rich-text content formatted directly within the native editor.
- **External Link:** Interactive button redirecting learners to external training platforms or documentation.
- **Quiz:** Graded interactive assessment that learners must pass to achieve lesson completion.

> **Completion Logic:** A learner earns course completion when every **Required** lesson has been completed. Optional lessons do not impede completion. If a course contains no required lessons, every lesson must be completed.

---

4. Creating a Course



Navigation: `E-Learning → Courses → + Create`

1. Select the target ministry or company in the top switcher.
2. Complete course metadata:

FIELD	DESCRIPTION
Title & Code	Unique course title and code identifier within the ministry (e.g., `SEC-101`, `ONB-HR-01`).
Category & Level	Assign to a category; set difficulty level (**Beginner**, **Intermediate**, or **Advanced**).

FIELD	DESCRIPTION
Duration (hours)	Expected time commitment displayed on course cards and printed on certificates.
Status	Lifecycle state: **Draft** (unpublished/hidden), **Published** (active for learners), or **Archived**.
Description & Thumbnail	Short summaries and visual banner (PNG, JPG, WEBP up to 5 MB).
Allow Self Enrolment	Makes the course visible in the public Course Catalog for voluntary employee enrollment.
Issue Certificate	Automatically generates a digital certificate upon course completion.
Certificate Template	Links the course to a specific certificate template (defaults to ministry template if left blank).

3. Save the record to enter the **Course Builder**.

---

5. Building Course Content

Navigation: `E-Learning → Courses → (Select Course / Build Content)`

1. Click **Add Section** to create a content module.
2. Inside the section, click **+ Lesson** and select the lesson type.
3. Configure the lesson:
   - Enter lesson title and set **Sequence** ordering.
   - Designate whether the lesson is **Required** or **Optional**.
   - Specify **Estimated Minutes** to give learners visibility into expected duration.
   - Upload media files, embed video links, or draft textual instructions.

---

6. Graded Quizzes & Assessments

When creating a Quiz lesson, saving the lesson opens the integrated Quiz Editor.

Assessment Rules

- **Pass Mark (%):** Percentage threshold required to pass (default 70%, range 1–100%).
- **Maximum Attempts:** Number of exam attempts allowed (set to `0` for unlimited attempts).
- **Shuffle Questions:** Randomizes question presentation on each attempt.

Question Formats

- **Single Choice:** Radio selection with exactly one correct answer.
- **Multiple Choice:** Checkbox selection requiring all correct answers to be marked.
- **True / False:** Binary choice question.

Learners must complete all questions before submitting. Unsuccessful attempts decrement the remaining attempts counter; once exhausted, the quiz is locked.

---

7. Course Assignments

Navigation: `E-Learning → Assignments → + Create`

Distribute training curricula systematically across workforce groups:

1. Select the published course.
2. Define assignment targets: select individual **Employees**, whole **Departments**, or specific **Job Positions** (or any combination).
3. Optionally configure a **Due Date** and administrative notes.
4. Saving automatically enrolls every matching active employee within the course's ministry.

> **Assignment Integrity:** The system enforces one enrolment per person per course. Updating or extending due dates synchronizes across enrolled learners automatically.

---

8. Tracking Learner Progress

Navigation: `E-Learning → Enrollments`

The Enrollments directory provides real-time oversight of all active learning journeys:

STATUS	MEANING
Not Started	Enrolled in course but has not yet opened lesson materials.
In Progress	Has commenced viewing lessons or completed intermediate modules.
Completed	Successfully completed all required lessons; certificate issued.
Overdue	Traversed beyond the configured assignment due date without completing.

Filter by department, course, or overdue status to identify workforce compliance gaps.

---

9. Digital Certificates & Public Verification

Certificates are generated automatically upon successful completion of qualifying courses.

Navigation: `Settings → E-Learning → Certificate Templates`

- **Design Themes:** Choose between **Classic**, **Modern**, **Elegant**, and **Minimal** layouts (standard A4 landscape format).
- **Styling & Copy:** Customize primary and accent brand colors, custom headers, and body text.
- **Signatories:** Configure up to two official signatory names, titles, and authorized signature images.
- **Public QR Verification:** Every issued certificate incorporates a unique identification number and an encrypted QR code. Scanning the QR code directs to a public verification page confirming the authenticity, recipient, course title, and issue date without requiring system login.

---

10. Course Modifications, Archiving & Deletions

- **Content Adjustments:** Progress is recalculated dynamically when lessons are added or removed. Previously completed learners retain their completion status and earned certificates.
- **Archiving vs. Deleting:**
  - **Archive:** Retains historical completion records and certificate validity while removing the course from new enrolments.
  - **Delete:** Permanently deletes course structure, assignments, and enrolments. Deletion is blocked if certificates have already been issued to learners.

Previous page
Offboarding

Next page
Pensions

Employee Management

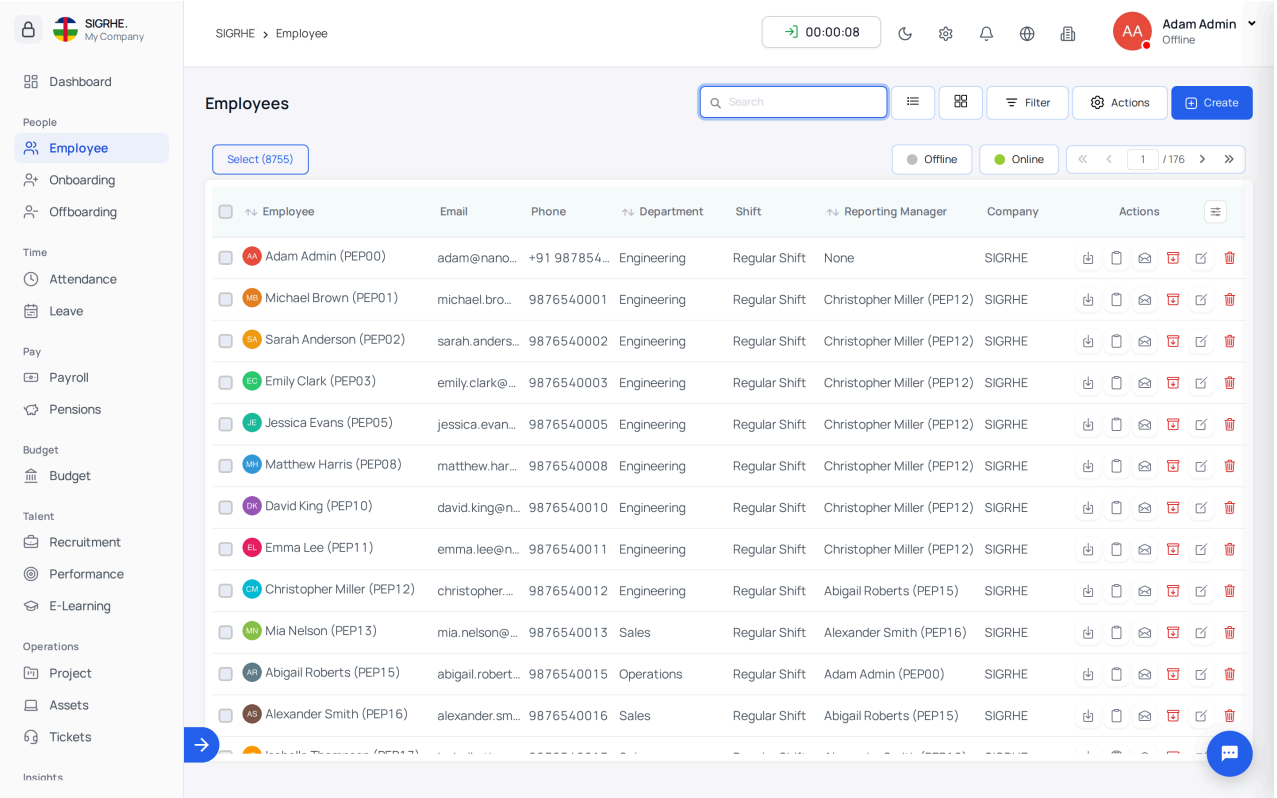
The Employee Management module in NKL-HR provides end-to-end administration of employee records, work information, schedules, employee requests, company policies, and disciplinary workflows.

1. Menu Overview

MENU	PURPOSE
Dashboard	Headcount charts, new joiners, expiring documents, and pending request counts. Unassigned employees appear under *Unassigned* to help identify incomplete records.
Employees	The central directory: create, edit, import, export, filter, archive, or delete employee profiles.
Organization Chart	Visual hierarchy and reporting lines, dynamically generated from each employee's **Reporting Manager**.
Requests	Manage employee submissions for shift adjustments, work type changes, and uploaded compliance documents.
Work Schedules	Rotating shifts, rotating work types, and the comprehensive shift roster.
Policies & Discipline	Company policy publication, FAQs, disciplinary actions, and deduction penalties.
Configuration	Master definitions for shifts, shift schedules, work types, employee types, and employee tags.

2. Employee Directory & Search

Navigation: `Employee → Employees`



The directory offers two presentation modes: **List View** and **Card View** (toggle via icons adjacent to the search bar).

- **Search:** Search dynamically by employee name, or target specific fields using the dropdown selector:
  - Badge ID
  - Reporting Manager
  - Department
  - Job Position
  - Job Role
  - Shift
  - Work Type
  - Company / Ministry
- **Filtering:** Use the side panel filter to segment employees by status, contract type, or location. Archived records are excluded by default; filter by **Is active** to include them.
- **Grouping:** Group records hierarchically by job position, department, shift, work type, job role, reporting manager, or company.

---

3. Adding an Employee

Navigation: `Employee → Employees → + Create`

1. **Select the Ministry / Company:** Confirm the correct entity is selected in the top company switcher before creating the record.

2. **Personal Information:** Enter basic details (First Name, Last Name, Date of Birth, Gender, Marital Status, Emergency Contacts, and Address). The **Email** entered must be unique, as it serves as the employee's login username.
3. **Work Information:** Define operational parameters:
    - Department, Job Position, and Job Role
    - Reporting Manager (used for approval chains and organizational hierarchy)
    - Shift, Work Type, and Employee Type (Permanent, Contract, etc.)
    - Work Location, Joining Date, and Contract End Date
4. **Save Record:** Upon saving, a unique Badge ID is automatically assigned and a system login account is created.
5. **Granting Access:** Open the newly created profile and select **Send Invitation** or **Send password reset link** to allow the employee to set their private password. Additional system roles are assigned under the **Groups & Permissions** tab.

---

4. Importing & Bulk Operations

Bulk Import

Navigation: `Employee → Employees → Actions → Import`

1. Download the pre-formatted Excel/CSV template for the *employees* dataset.
2. Populate employee rows adhering to the column specifications.
3. Upload the file for validation and import. Historical import batches can be reviewed under `Settings › Master Data › Import History`.

Directory Bulk Actions

Navigation: `Employee → Employees → Actions` Select one or more employees in the directory list to execute mass operations:

- **Export:** Download selected or filtered employee data as a spreadsheet, choosing specific fields to include.
- **Archive / Un-archive:** Archive leavers or restore inactive personnel in bulk.
- **Bulk Mail:** Broadcast email notifications directly to selected personnel or apply saved email templates.
- **Reset Password / Send Invitation:** Trigger automated onboarding invitations or reset password links.
- **Delete:** Permanently remove selected records created in error.

---

5. Employee Profile Management

Navigation: `Employee → Employees → (Select Employee)`

The employee profile consolidates all administrative records into distinct tabs:

TAB	CONTENTS
About	Personal information, contact numbers, residential address, emergency contacts, bank accounts, and employment details.
Work Type & Shift	Assigned shift and work type, along with historical shift requests and rotational assignments.
Groups & Permissions	Assigned system roles, security groups, and granular permissions for the user.
Note	Internal HR administrative notes with file attachments.
Documents	Mandatory identification, contracts, or compliance documents requested from or submitted by the employee, including expiry tracking.
Mail Log	Complete audit log of all system emails dispatched to the employee.
History	Audit trail recording changes to work information fields (enabled via Work Information Tracking).

Profile Action Bar: Admins can access quick actions directly from the profile header: **Edit Profile**, **Export Individual Data**, **Allocations**, **Send Mail**, **Send Invitation**, **Send password reset link**, **Reset Password**, **Archive / Un-Archive**, **Block Account / Un-Block Account**, and **Delete**.

---

6. Archiving, Blocking & Deletion

NKL-HR provides distinct mechanisms for managing employee departures and account access:

FEATURE	ARCHIVE	BLOCK ACCOUNT	DELETE
Primary Use	Employees who have left the organization	Temporary suspension or access restriction	Records created mistakenly
Record State	Hidden from operational lists and forms; historical data preserved	Retained in all lists and directories	Permanently removed from database
Login Access	Revoked immediately	Suspended immediately	Permanently destroyed
Reversibility	Fully reversible via **Un-**	Fully reversible via	Irreversible

FEATURE	ARCHIVE	BLOCK ACCOUNT	DELETE
	Archive	Un-Block Account	
Restrictions	Last active superuser cannot be archived	Superusers cannot be blocked	Preserves data integrity

> **Dependency Warning:** If an employee cannot be archived due to active dependencies (e.g., serving as a reporting manager or stage manager), a **Can't Archive** dialog lists the blocking associations. Reassign the dependencies to a designated replacement within the dialog to complete archiving.

---

7. Employee Requests

Navigation: `Employee → Requests`

Centralized processing of operational requests submitted by employees:

- **Shift Requests:** Review requests for temporary shift reassignments. Approving automatically updates the employee's work schedule.
- **Shift Inbox:** View shift assignments allocated directly to employees (e.g., emergency coverage).
- **Work Type Requests:** Approve or reject applications for temporary work type changes (e.g., remote, hybrid, office).
- **Documents:** Oversee mandatory documentation requests dispatched to employees, track document upload status, and review submitted files.

---

8. Work Schedules & Rosters

Navigation: `Employee → Work Schedules`

- **Rotating Shift:** Schedule recurring shift rotations that automatically update assigned shifts based on configured intervals.
- **Rotating Work Type:** Automate cyclical transitions between office, remote, or hybrid work arrangements.
- **Shift Roster:** Calendar-based interface visualizing employee shift allocations across dates, departments, and teams.

---

9. Configuration Master Data

Navigation: `Employee → Configuration`

Manage foundational scheduling and classification lists:

- **Shifts:** Define shift names (e.g., Morning Shift, Night Shift, Weekend Support).
- **Shift Schedules:** Set scheduled start and end times per weekday, minimum required hours, and optional automated clock-out triggers.
- **Rotating Shifts & Work Types:** Configure cycle sequences, durations, and rotation rules.
- **Work Types:** Define working modalities (e.g., On-Site, Remote, Hybrid).
- **Employee Types:** Classify contract terms (e.g., Permanent, Probationary, Fixed-Term, Contractor).
- **Employee Tags:** Custom labels used for ad-hoc grouping and reporting.

---

10. Policies & Disciplinary Management

Navigation: `Employee → Policies & Discipline`

Company Policies

Publish organizational guidelines, employee handbooks, and compliance directives.

- **Publish to All (On):** Policy is accessible to every employee within the selected ministry/company.
- **Publish to All (Off):** Policy is restricted strictly to designated individuals, departments, or job positions.
- Supports rich-text descriptions and downloadable document attachments.

Disciplinary Actions

Track workplace compliance and formal disciplinary measures:

- **Action Types:**
  - **Warning:** Formal administrative reprimand recorded in the profile.
  - **Suspension:** Temporary suspension defined in hours or days. When **Enable login block** is configured on the action type, the employee's system login is automatically blocked for the duration.
  - **Dismissal:** Formal termination of employment, initiating offboarding and system credential revocation.
- **Recording Actions:** Select affected employees, assign the action type, specify duration (days or hours), define the effective start date, and attach supporting documentation. Removing a suspension or deleting the action automatically restores login access.
- **Penalties:** Displays financial or attendance penalties levied against employees (e.g., repeated tardiness deductions).

---

11. System Preferences & Settings

Navigation: `Settings › General › System Preferences`

- **Badge ID Prefix:** Configure a custom prefix (up to 5 characters, e.g., `EMP`) used to generate sequential Badge IDs (`EMP0001`, `EMP0002`...).
- **Default Expire Days:** Number of days announcements remain active before expiring automatically, per ministry.
- **Default Records Per Page:** Custom number of table rows displayed across lists, per ministry.
- **Currency Symbol & Position:** Standard monetary symbol (`$`, `€`, `FCFA`) and display placement (before/after amount).
- **Date & Time Format:** System-wide date formatting and 12-hour/24-hour time standards.
- **Restrict Login Account:** Enables administrators to manually block or unblock employee user logins directly from employee profiles.
- **Restrict Profile Edit:** Prevents employees from modifying their own core profile details after initial onboarding.
- **Work Information Tracking & Tracking Fields:** Configures comprehensive audit logging for selected work information attributes, displaying changes within the profile **History** tab.
- **Enable Languages:** Controls which languages appear in the top bar language switcher.

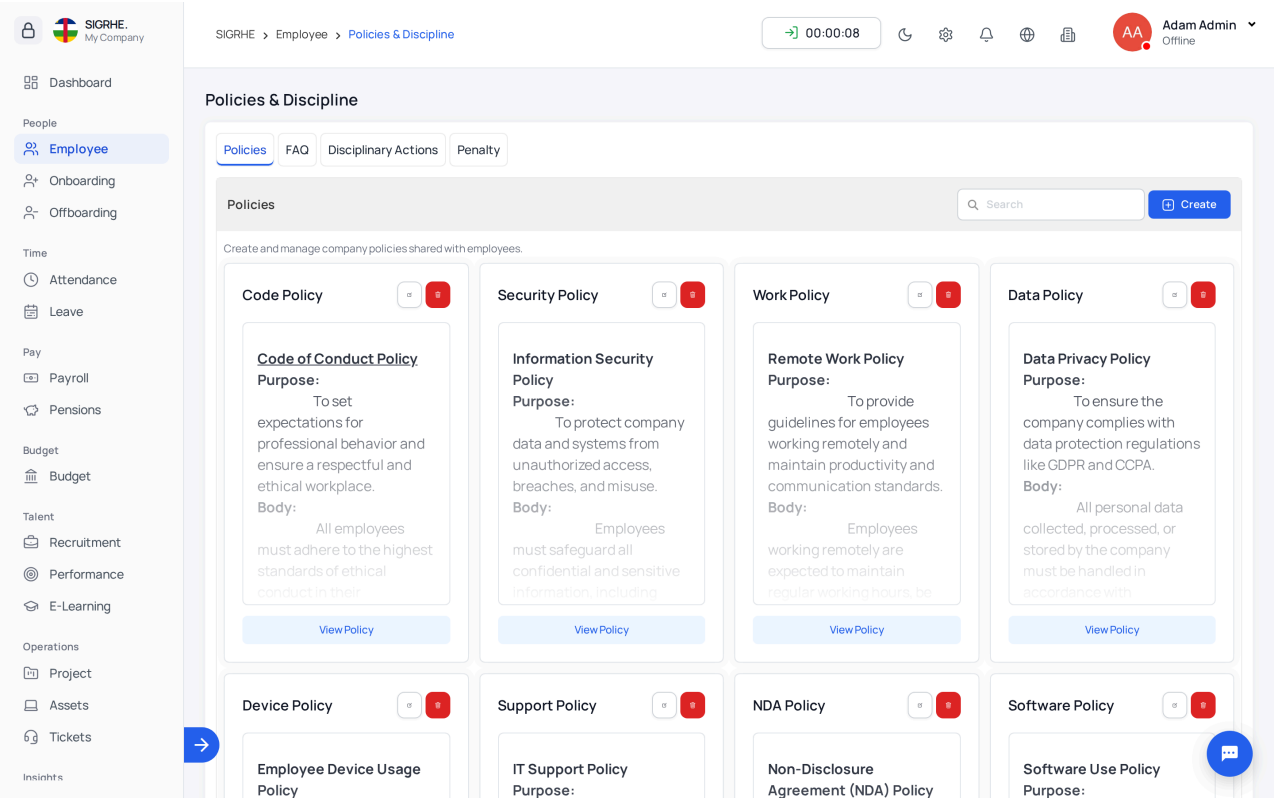
Last updated: 10/24/25, 2:58 PM

Previous page
Onboarding

Next page
Profile

Disciplinary Actions

Disciplinary action is used if any misbehaving or anything is done by the employee in the organization, then the admin can take actions against him like a warning, suspension or dismissal like that. So in the settings page, we need to create the action that should be taken against an employee. At that time the admin can decide if the action is taken then the employee's login needs to be blocked or not, if it is turned on a suspended or a dismissed employee's login credentials get blocked he/she cannot log in to the software for the period of the action dates. The disciplinary action can be accessed by clicking the Disciplinary action marked as 1 in the submenu of Employees. We have a tabular view that shows all the details of that action taken. In the suspension type, we have 2 options for how the suspension should be taken, can take suspension for day-based or hour-based. If the actions login is blocked is turned on then after the period based on hour or day, the blocked login will be removed automatically.



Now lets check how can we take an action against an employee. Admin can get a form by clicking on the button Take An Action in the right corner. The form will look like this,

- **Employees:** A dropdown menu where the administrator selects the employee to take action against.
- **Action:** A dropdown list where the administrator selects the type of action to be taken (e.g., suspension, dismissal). These actions are predefined in the settings page.

- **Description:** A text field where the administrator provides details or reasons for the action.
- **Unit in:** A dropdown menu where the administrator chooses whether the action will be based on "Days" or "Hours." This is relevant for actions like suspensions, where the duration is set.
- **Days:** A numeric input field to specify the number of days (or hours) the action will last. The label and functionality change depending on the selection made in the "Unit in" field.
- **Start Date:** A date picker to set the starting date for when the action should be effective.
- **Attachment:** An option to upload files (e.g., supporting documents, evidence) related to the action.

Additional Functionality (Background Details):

- **Login Blocking:** When setting up actions in the settings page, administrators can determine whether the action should block the employee's login credentials. If this option is enabled, the employee won't be able to log into the system during the disciplinary period.
- **Suspension Types:** The system allows two types of suspensions: day-based or hour-based. The selection made in the "Unit in" field determines the mode of suspension.
- **Automatic Restoration:** If login blocking is enabled, the system will automatically restore the employee's login access once the disciplinary period ends.

Last updated: 10/24/25, 2:58 PM

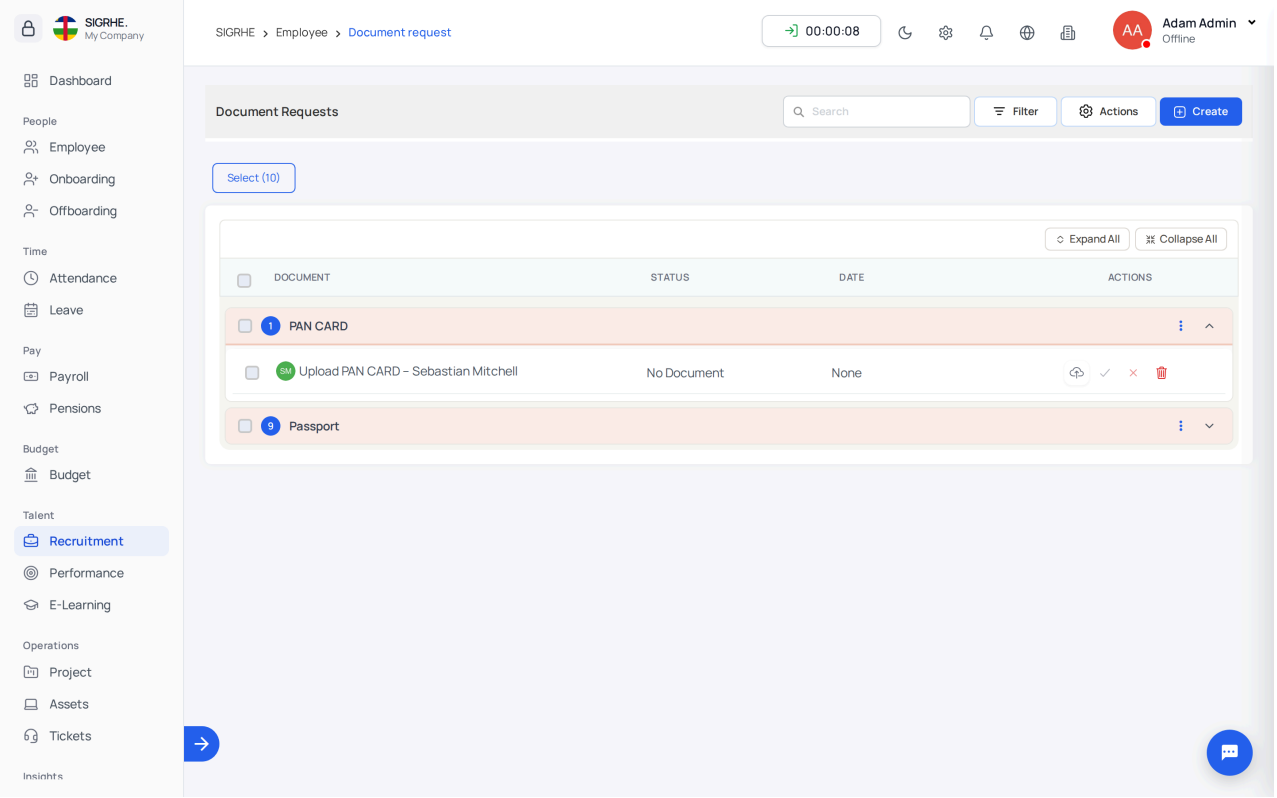
Previous page
Policies & Discipline (Policies)

Next page
Payroll

NKL-HR / HRMS / Document Requests

Document Requests

The Document Request feature allows HR administrators and reporting managers to solicit mandatory compliance, identification, and contractual documents directly from employees.



1. Overview & Permissions

Navigation: `Employee → Requests → Documents` (or `Employee → Document Request`)

Access is restricted to HR administrators and reporting managers. Employees receive notifications for document requests and can upload required files directly through their profile's **Documents** tab.

2. Creating a Document Request

Click **+ Create** to initiate a new document request:

- **Title:** The name or category of the required document (e.g., *Passport Copy*, *Driver's License*, *Degree Certificate*, *Work Permit*).
- **Employees:** Target individual employees, or use the filter widget to request documents from entire departments or job positions.
- **Format:** Allowed file formats (e.g., PDF, TXT, DOCX, XLSX, JPG, PNG, JPEG).
- **Max Size:** Maximum permissible upload size per file (in megabytes).
- **Description:** Detailed instructions or compliance guidelines for the employee.

---

3. Reviewing & Approving Submissions

The document request dashboard tracks submission progress across the workforce:

- **Submission Counter:** Displays the count of submitted documents against total requested employees.
- **Status Indicators:**
  - **Pending Upload:** Document has been requested but not yet uploaded by the employee.
  - **Waiting Approval:** Document has been submitted by the employee and awaits review.
  - **Approved:** Document has been reviewed and accepted into the employee's official record.
  - **Rejected:** Document was rejected; employee is notified to re-upload with reasons provided.
- **Document Expiries:** When uploading documents that carry expiration dates (e.g., visas, certifications), employees or admins can specify the expiration date and configure advance notification days to ensure timely renewals.

Last updated: 10/24/25, 2:58 PM

Previous page
Organization Chart

Next page
Shift Requests

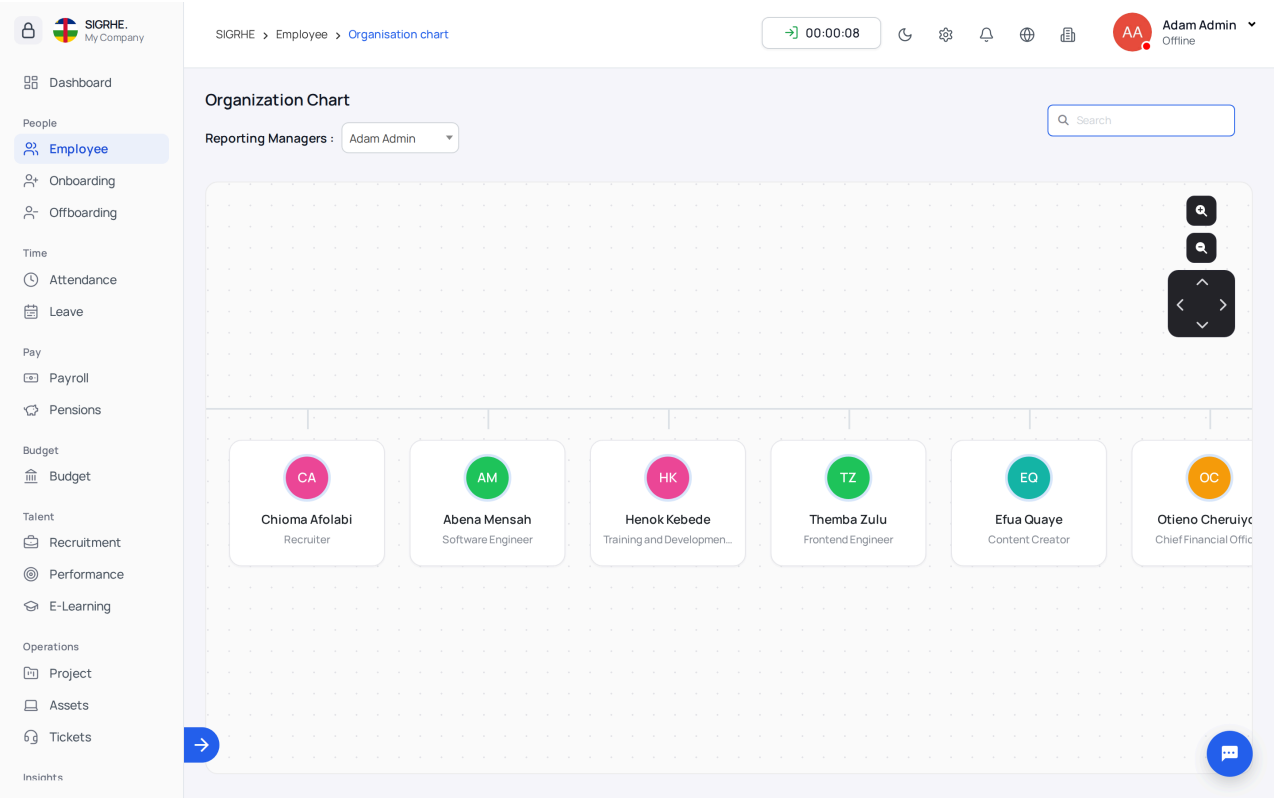
NKL-HR / HRMS / Organization Chart

Organization Chart

The Organization Chart provides an interactive visual hierarchy representing organizational reporting lines and departmental structures within NKL-HR.

1. Hierarchical Architecture

Navigation: `Employee → Organization Chart`



The organizational tree is dynamically constructed from each employee's assigned **Reporting Manager** defined within their work information:

- Top-level executives appear at the apex of the chart.
- Subordinate managers, team leads, and individual contributors branch downward based on direct reporting relationships.
- Vacant positions or misaligned positions can be corrected directly by editing the employee's **Reporting Manager** field in their work profile.

2. Filtering & Search

- **Manager Filter:** Filter the chart by selecting a specific manager to isolate their direct and indirect reporting tree.
- **Department Filter:** Focus on specific functional departments to analyze team structures and spans of control.
- **Profile Shortcuts:** Clicking on any employee node within the chart provides an instant summary card with direct navigation to their complete employee profile.

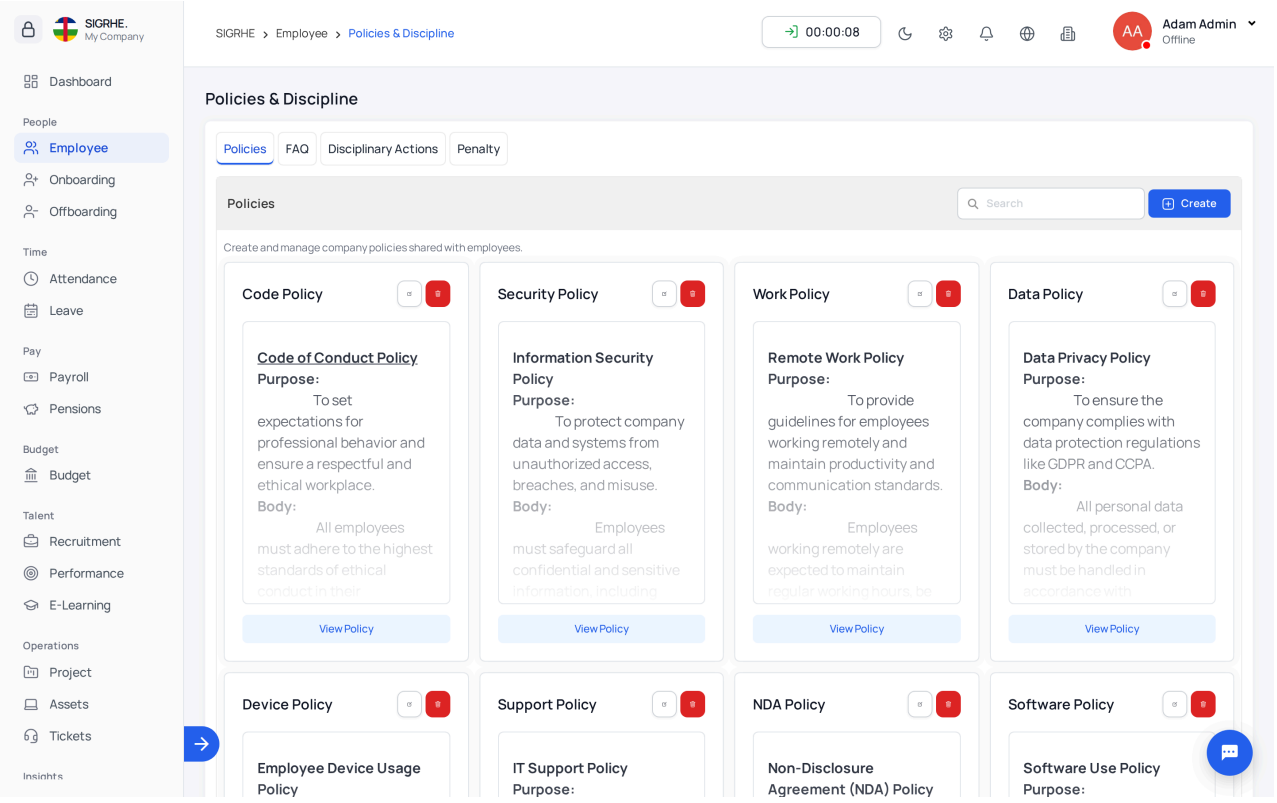
Last updated: 10/24/25, 2:58 PM

Previous page
Profile

Next page
Document Requests

Policies

Company policies are a set of guidelines and rules established by an organization to govern the behaviour, actions, and decision-making of its employees. These policies serve several purposes, including ensuring compliance with laws and regulations, promoting a safe and respectful work environment, protecting company assets, and maintaining consistency and fairness in organizational practices. Here the admin can create the company policies and all the employees can access this for reading purposes by clicking the Policies menu marked as 1 under the Employees menu.



This is the from to create a company policy, lets go through the fields:

- **Title**:This is a text field where you input the title of the policy.
- **Body**:This is a rich-text editor where you can enter and format the content of the policy. You can change the font, size, color, and apply styles like bold, italics, underline, etc. Additional features include adding links, lists, and images.
- **Is visible to all**:This is a checkbox option that, when selected, makes the policy visible to all employees. If unchecked, the policy might only be visible to specific users or groups.
- **Company**:This dropdown lets you select the company or organizational entity the policy applies to. In the image, the company "NKL-HR" is selected.

- **Attachments**:This field allows you to attach files to the policy, such as PDFs, documents, or images, that might be relevant for users.

Last updated: 10/24/25, 2:58 PM

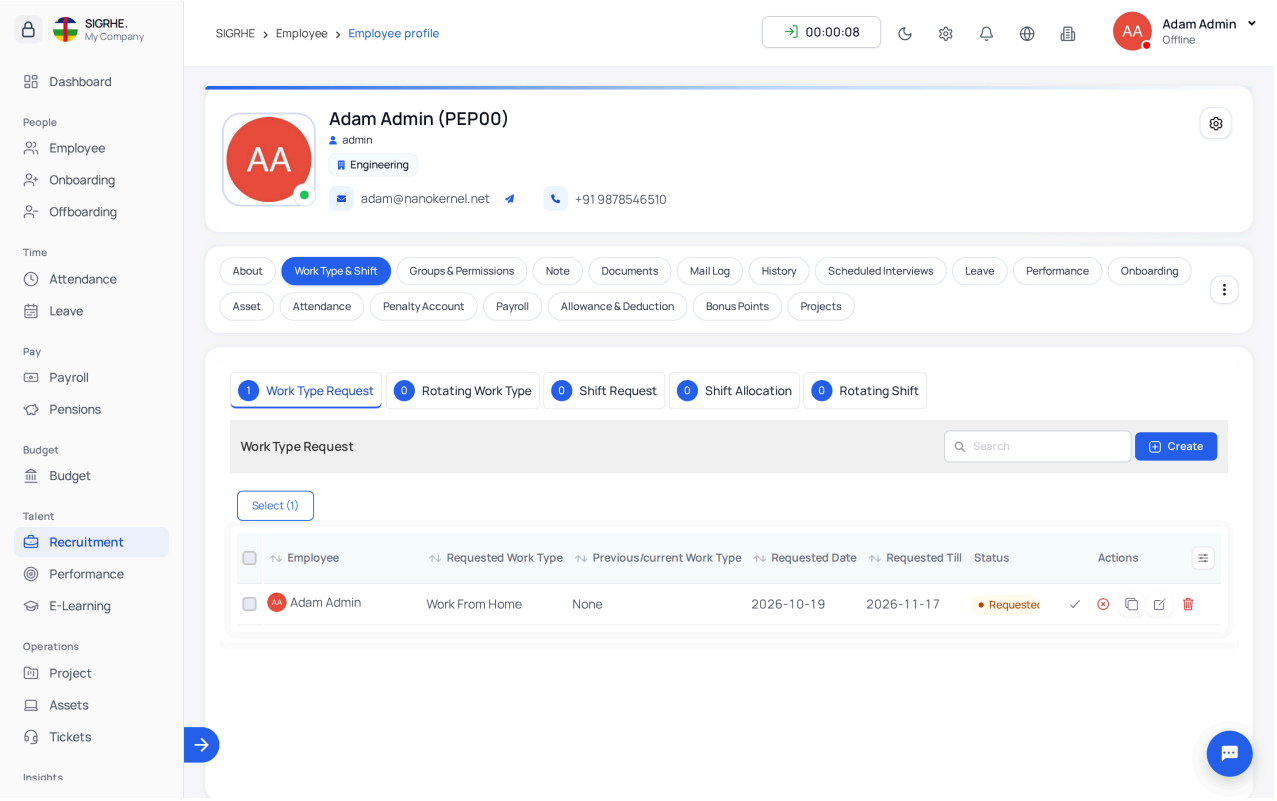
Previous page
Work Schedules (Rotating Work Type)

Next page
Policies & Discipline (Disciplinary Actions)

NKL-HR / HRMS / Employee Profile

Employee Profile

The Employee Profile serves as the centralized digital record for an individual employee within NKL-HR. It consolidates personal identity records, work assignments, access permissions, administrative notes, compliance documents, and communication logs.



1. Navigating to the Profile

Navigation: `Employee → Employees → (Select an Employee)`

Administrators can browse through employee profiles sequentially using the previous and next navigation arrows in the profile header, or return to the main directory at any time.

2. Profile Tabs & Information Structure

The profile view organizes employee information into seven distinct tabs:

TAB	CONTENTS
About	Personal information, contact numbers, residential address, emergency contacts, bank details, and employment work information.
Work Type & Shift	Current assigned shift and work type, along with historical shift change requests, shift allocations, and active rotation cycles.
Groups & Permissions	Assigned system roles, security groups, and granular system permissions for this specific user.
Note	Internal HR administrative notes, comments, and confidential file attachments.
Documents	Identification, contracts, visas, and compliance documents requested from or uploaded by the employee, including expiration dates and alert thresholds.
Mail Log	Complete audit trail of all automated system notifications and custom emails dispatched to the employee.
History	Audit log detailing all modifications made to the employee's work information attributes over time (active when Work Information Tracking is enabled).

---

3. Administrative Profile Actions

From the profile action bar, authorized administrators can execute key operational actions:

- **Edit Profile:** Update personal details, work assignments, or banking information.
- **Export Individual Data:** Download the employee's historical data into spreadsheet format.
- **Allocations:** View and manage specific operational allocations assigned to the employee.
- **Send Mail:** Dispatch a direct email to the employee, with support for email templates and attachments.
- **Send Invitation:** Dispatch an onboarding invitation email allowing the employee to activate their account.
- **Send Password Reset Link:** Email a secure link allowing the employee to configure a new password.
- **Reset Password:** Manually specify a new password for the user.
- **Archive / Un-Archive:** Archive the record upon departure or restore an archived profile.
- **Block Account / Un-Block Account:** Temporarily restrict or restore system login access (available when *Restrict Login Account* is enabled).
- **Delete:** Permanently remove an employee record created in error.

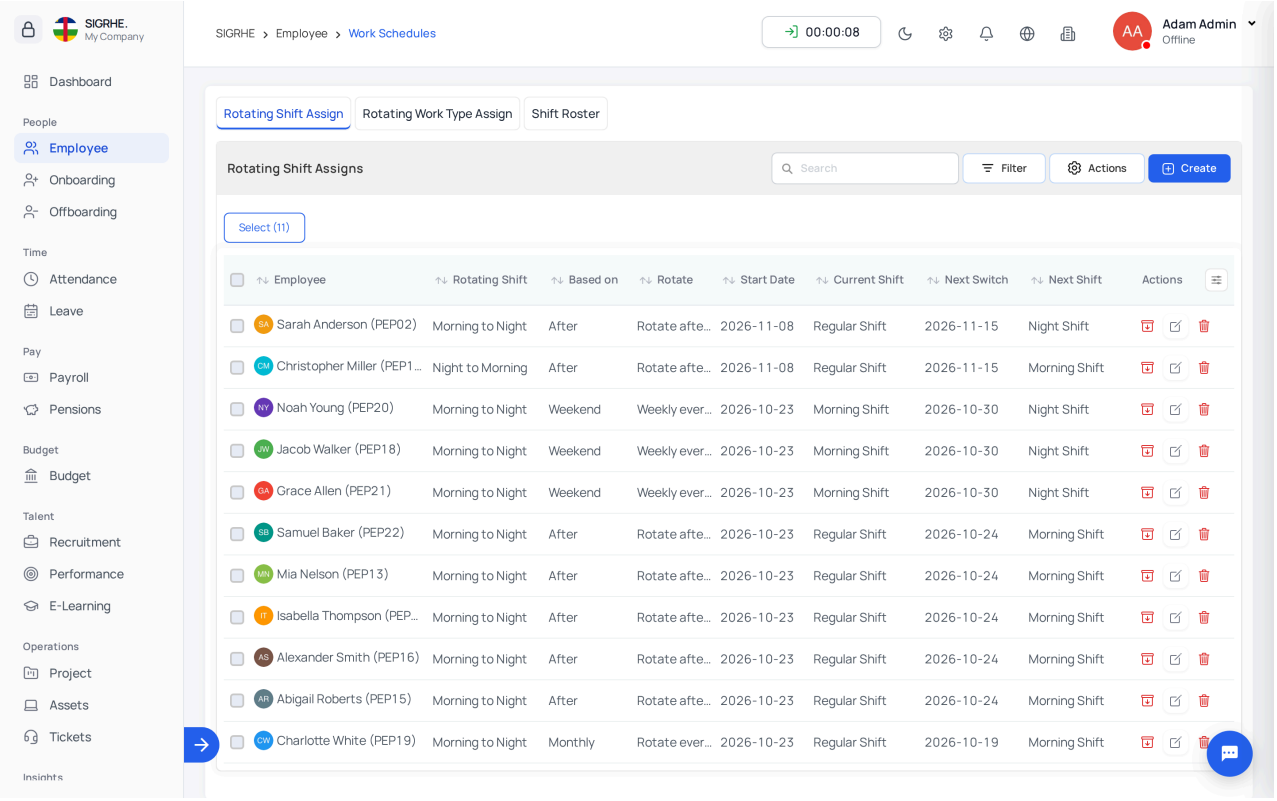
Last updated: 10/24/25, 2:58 PM

Previous page
Employee

Next page
Organization Chart

Rotating Shift Assign

Rotating shift assign is used to manage the frequently changing shift information of employees. You can create rotating shift assign with some based on conditions. There are mainly three conditions after, weekend, and monthly.



Rotating shift can easly assign to employees by clicking the assign button at the right top corner, by clicking that a form will appear.

- **Employees:** The field is to select the employees, and it is a multi-selection field, that can select multiple employees and also by filtering.
- **Rotating Shift:** This field is used to select the rotating shift assigned to employees. Shifts are configured under Employee configuration.
- **Start date:** A date field to choose when the rotation should start.
- **Based on:** There are 3 types,
- After: Update the shift information with fixed intervals of days
- Weekend: Update the shift information on any weekday that you choose.
- Monthly: Update the shift information on every date that you choose.

- **Rotate:** This field depends on the above mentioned field “Based On”.

  If the based on field is “**After**” the field will be “**Rotate after day”** and is a number field to select a value.

  If the based on field is “**Weekend”** the field will be “**Rotate every weekend”** and is a field to select the day in a week.

  If the based on field is “**Monthly”** the field will be “**Rotate every weekend”** and is a field to select the date in a month

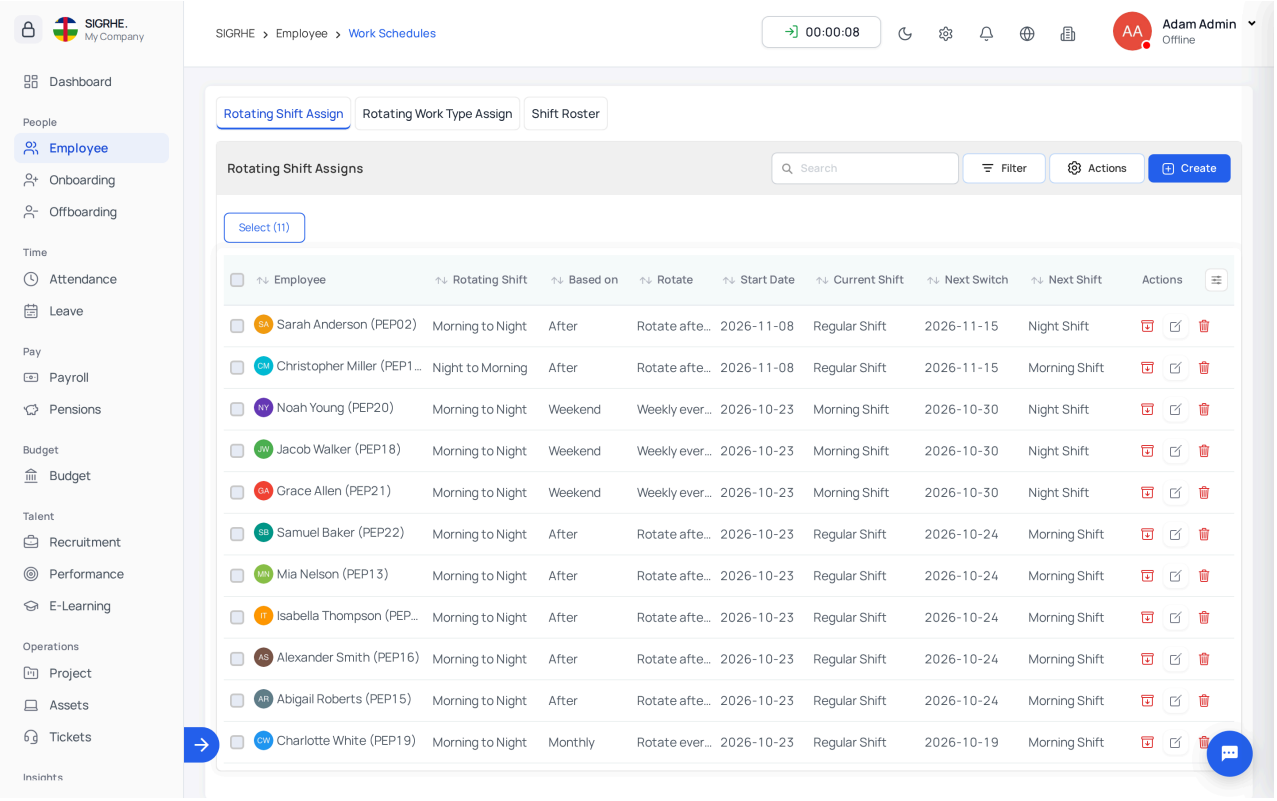
Last updated: 10/24/25, 2:58 PM

Previous page
Work Type Requests

Next page
Work Schedules (Rotating Work Type)

Rotating Work Type Assign

Rotating work-type assign is used to manage the frequently changing work type like rotating shift. You can create rotating work-type assign with some based on conditions. There are mainly three conditions after, weekend, and monthly like the rotating shift assign.



Admin can assign work type to multiple employees at a time, we can go through the form,

- **Employees:** The field is to select the employees, and it is a multi-selection field, that can select multiple employees and also by filtering.
- **Rotating Work Type:** This field is used to select the work type assigned to employees. Work types are configured under Employee configuration.
- **Start date:** A date field to choose when the rotation should start.
- **Based on:** There are 3 types,
- After: Update the work type information with fixed intervals of days
- Weekend: Update the work type information on any weekday that you choose.
- Monthly: Update the work type information on every date that you choose.
- **Rotate:** This field depends on the above mentioned field “Based On”.

If the based on field is “**After**” the field will be “**Rotate after day”** and is a number field to select a value.

If the based on field is “**Weekend”** the field will be “**Rotate every weekend”** and is a field to select the day in a week.

If the based on field is “**Monthly”** the field will be “**Rotate every weekend”** and is a field to select the date in a month

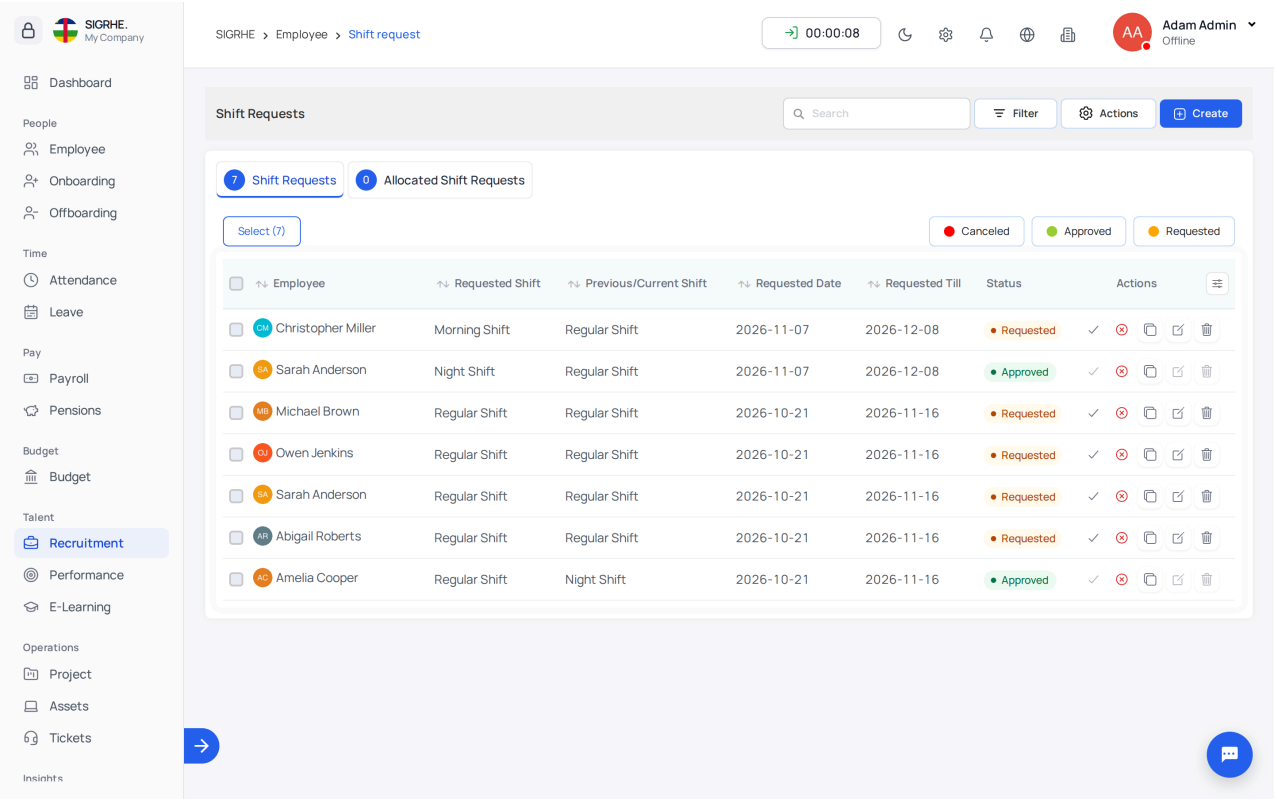
Last updated: 10/24/25, 2:58 PM

Previous page
Work Schedules (Rotating Shift)

Next page
Policies & Discipline (Policies)

Shift Requests & Reallocation

Shift Requests enable employees to request temporary or permanent adjustments to their assigned working shifts, while Shift Reallocation allows colleagues to swap shifts for coverage.



1. Overview & Permissions

Navigation: `Employee → Requests → Shift Requests`

Employees can view their own requests and submit new applications, while reporting managers and administrators can review, approve, or reject submissions across their teams.

2. Submitting a Shift Request

Click **+ Create** to submit a request:

- **Employee:** Selected employee (dropdown visible to administrators; regular employees default to their own record).
- **Requesting Shift:** The desired shift schedule (e.g., Morning, Evening, Night).
- **Requested Date:** The start date for the proposed shift change.
- **Requested Till:** The concluding date for temporary shift changes.
- **Permanent Request:** Toggle switch indicating whether the change is permanent. When enabled, the end date is omitted, permanently updating the employee's work schedule upon approval.
- **Description:** Justification or context for the shift adjustment.

---

3. Shift Reallocation & Shift Inbox

When an employee needs a colleague to cover their shift:

- **Shift Reallocation:** Initiated via the employee profile under `Work Type & Shift → Reallocate Shift`. The employee specifies the target shift, the date range, and the colleague (**Reallocate Employee**) to swap with.
- **Colleague Availability:** The request appears in the designated colleague's **Shift Inbox**. The colleague can mark their availability as *Available* or *Not Available*.
- **Managerial Approval:** Once the colleague responds, the reporting manager or administrator reviews the request. Approving automatically swaps the assigned shifts between the two employees for the specified duration.

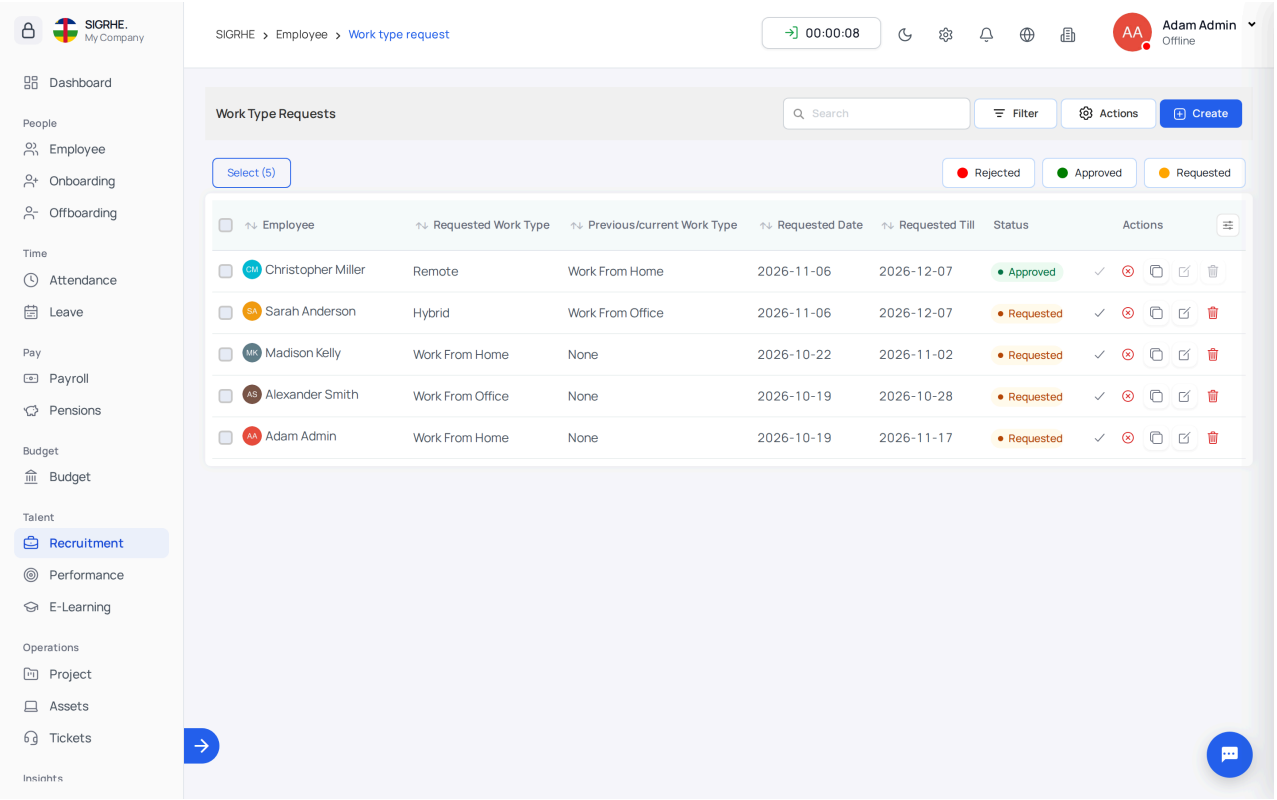
Last updated: 10/24/25, 2:58 PM

Previous page
Document Requests

Next page
Work Type Requests

Work Type Request

The Work Type Request view allows employees to request adjustments to their working arrangements (such as remote or office work), subject to administrative approval.



Employee work type request view can be accessed by clicking the work type marked as 1 under Employees view. Work types are the work nature of how the employee should work like from the office, home, etc. Similarly to the shift requests, the employee can request a different work type if he/she wants to work with a different work type for a particular period. When the period ends, the previous work type should be updated automatically. To change the employee worktype on the requested day then the administrator or the manager need to approve the request first. Here we have all the work type request view as tabular view as the same as our shift request view. All features in the list tabular view are the same in almost all views. The 3 dots, quick filters, the actions, duplicates etc all options. Now let's go through the form and fields to create a work type request,

- **Employees:** A dropdown menu where the administrator selects the employee. Only for admin view all employees will be available if a normal employee only see his/her name.
- **Requesting Work Type:** This field is to select the work type that the employee wants to work. Ensure that work types are configured earlier by an administrator under Employee configuration.

- **Requested Date:** A date field to choose when the employee should start the work type.
- **Requested Till:** A date field to choose when the work type will end, it's like the end date for the work type of the employee.
- **Description:** The description for the work type request.
- **Permanent Request:** This one is a toggle field, if the button is enabled the field **"Requested till"** will disappear from the form because it is a permanent request so there is no end date for the request.

Last updated: 10/24/25, 2:58 PM

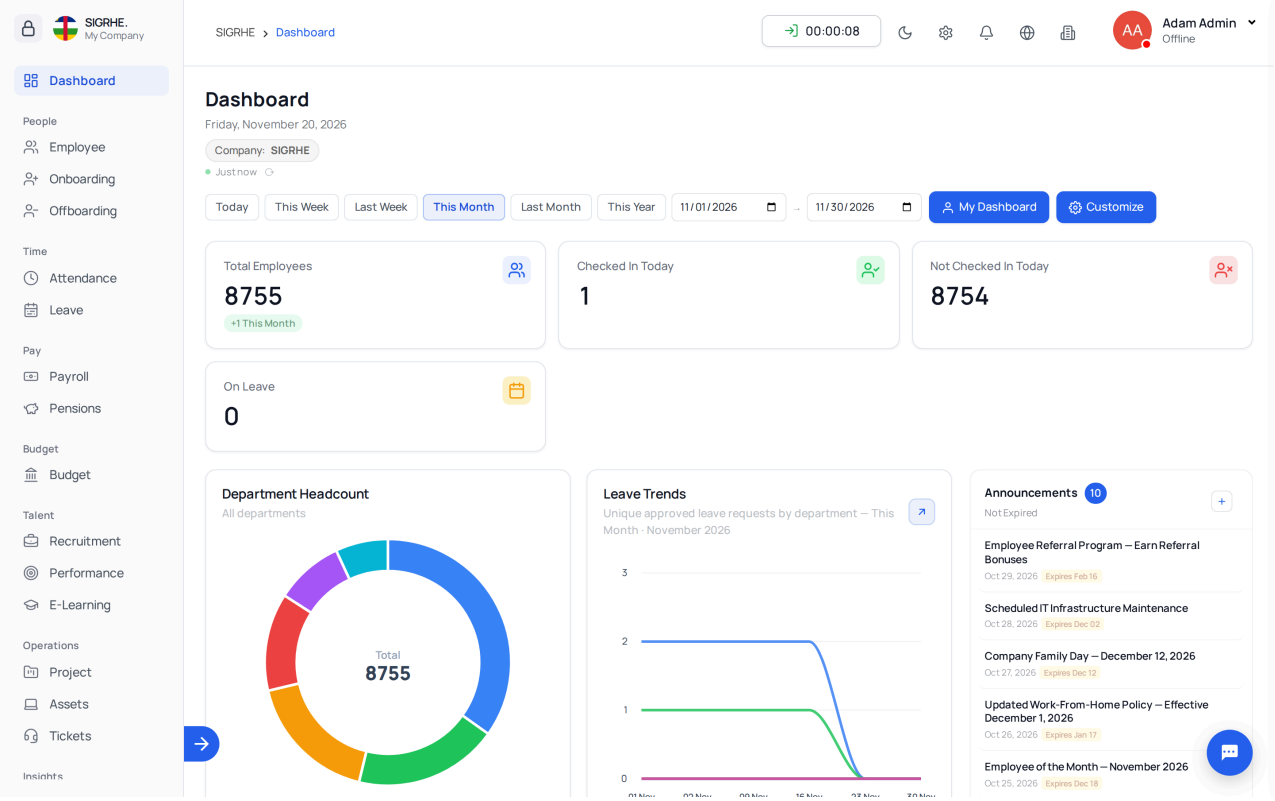
Previous page
Shift Requests

Next page
Work Schedules (Rotating Shift)

NKL-HR Functional Documentation

Introduction

NKL-HR is an enterprise Human Resource Management System (HRMS) designed to meet the operational and administrative needs of organizations and ministries. NKL-HR provides a cohesive, unified workspace covering workforce administration, recruitment pipelines, attendance tracking, leave governance, payroll management, talent onboarding, structured offboarding, performance evaluation, learning management, and comprehensive pension administration.



Accessing the Application

Signing In and the Sidebar

Employees sign in using their work email as the username. Each module is accessible directly via the sidebar navigation. Menus, tabs, and action buttons are dynamically displayed based on your

assigned roles and permissions.

Select the Ministry / Company First

Every list and operation is scoped to the organization or ministry selected in the **company switcher** located at the top of the interface.

- Ensure you select the target ministry before creating, importing, or modifying records.
- For users holding roles across multiple ministries or entities, selecting **All my companies** provides a consolidated view.

Roles and Permissions

Access permissions are managed per ministry through roles under `Settings › General › Roles and Permissions`. Assigning access via roles ensures standardized governance across teams. Reporting managers, leave approvers, and designated stage/task managers retain operational control over their respective team records.

Recommended System Setup Order

When configuring a new deployment or onboarding a new ministry, execute setup in this recommended sequence:

1. **Organization Master Data (`Settings › Organization`):** Create Companies (Ministries), Departments, Job Positions, Job Roles, and Weekly Off Days.
2. **Public Holidays (`Leave › Public Holidays`):** Configure statutory public holidays and annual recurring non-working days under Leave.
3. **General System Preferences (`Settings › General › System Preferences`):** Set Badge ID Prefix, currency conventions, date/time standards, and enabled languages.
4. **Email Configuration (`Settings › Email › Email Servers` or `Outlook Mail`):** Establish mail server connectivity and dispatch a test email (e.g., password reset).
5. **Roles & Permissions (`Settings › General › Roles and Permissions`):** Define standardized security roles and assign administrative personnel per ministry.
6. **Module Governance Rules:** Establish Attendance Rules, Leave Rules, Offboarding Rules, Encashment Settings, Asset Rule, and Candidate Portal preferences under their respective Settings sections.
7. **Master Data Import (`Settings › Master Data › Import Data`):** Bulk import employee directories, followed by initial leave balances, physical asset registries, and candidate pools.
8. **E-Learning Setup (`Settings › E-Learning`):** Define course categories and establish the default completion certificate template.

Core HRMS Modules

Recruitment

Manage candidate pipelines, resume shortlisting, structured interview scheduling, stage progression, skill zones, and open job surveys.

Onboarding

Transition hired candidates into active personnel via candidate pipeline tracking, digital self-service onboarding portals, configurable onboarding stages, and automated task checklists.

Employee Management

Maintain the central employee directory, personal and banking profiles, contract details, shift and work type requests, rotating schedules, company policies, and formal disciplinary actions.

Payroll

Administer employment contracts, salary allowances, deductions, payslip generation, advance salary loans, reimbursements, encashments, and tax calculations.

Attendance Management

Track daily clock-in/out logs, biometric device records, automated validation rules, overtime approval workflows, late arrival penalties, and monthly attendance reconciliation.

Leave Management

Administer customized leave policies, automated balance resets, carry-forward rules, multi-tier approval chains, compensatory leave, and holiday blackout periods.

Performance

Monitor employee goals, 360-degree feedback reviews, objective assessments, and key performance indicators.

Offboarding

Govern employee departures with structured resignation request approvals, multi-stage exit processes, asset/authority handover tasks, notice period calculations, and automated account archival.

E-Learning

Author interactive courses with multimedia lessons and graded quizzes, assign curricula by department or position, monitor learner progression, and issue verifiable digital completion certificates.

Pensions (Pension Management)

Manage pension funds, contribution deductions, periodic statutory declarations, retirement forecasting, claim lifecycle processing, survivor benefit liquidation, pensioner registries, and payment files.

Settings

Central administration: system preferences, organization hierarchy, email servers, module rules, integrations, and bulk master data import.

Permissions & Administration

Comprehensive role-based access matrix across all functional modules, security controls, and system administrative command-line operations.

Last updated: 10/24/25, 2:58 PM

Next page
Dashboard

Leave Management

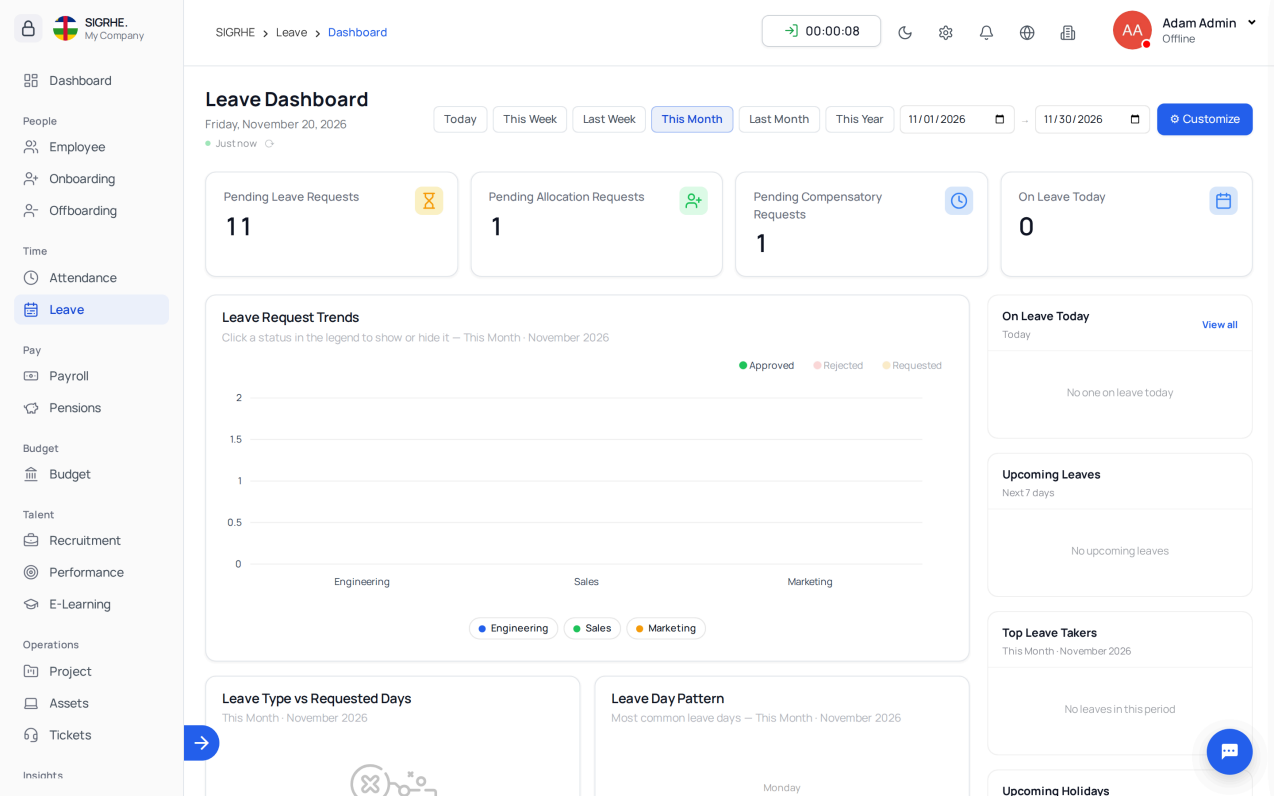
The Leave Management module in NKL-HR governs employee time-off requests, balances, multi-tier approval chains, automated balance resets, and holiday calendar integration.

1. Prerequisites & Setup Order

Configure leave policies in the following sequence:

1. **Public Holidays & Weekly Off Days:** Configure weekly rest days under `Settings › Organization › Weekly Off Days` and statutory holidays under `Leave › Public Holidays` so that leave durations are computed accurately.
2. **Leave Types:** Define leave categories and entitlements in `Leave → Configuration → Leave Types`.
3. **Approval Rules:** Establish multi-tier sign-off workflows under `Leave → Configuration → Multiple Approval Rules`.
4. **Balances:** Allocate leave quotas to employees via `Leave → Leave Balances`.

2. Menu Overview



MENU	PURPOSE
Dashboard	Visual analytics showing currently absent personnel, pending requests, and leave trends by department.
My Leave Requests	Self-service view for employees to inspect personal quotas, request leave, and track approval states.
Leave Requests	Administrative queue to review, approve, or reject leave requests across the organization.
Leave Allocation Request	Administrative review for employee submissions requesting additional leave quota days.
Compensatory Leave Requests	Requests to earn compensatory time-off for extra hours worked during holidays or weekly off days.
Leave Balances	Central ledger displaying each employee's balance per leave type, with manual adjustment options.
Restricted Leave Periods	Blackout date windows during which employee leave requests are blocked.
Public Holidays	Official non-working statutory holiday calendar configured under `Leave › Public Holidays`.
Configuration	Setup interfaces for Leave Types and Multiple Approval Rules.

3. Creating & Configuring Leave Types

Navigation: `Leave → Configuration → Leave Types → + Create`

1. **Basic Configuration:** Specify the leave type name, icon, and basic parameters:

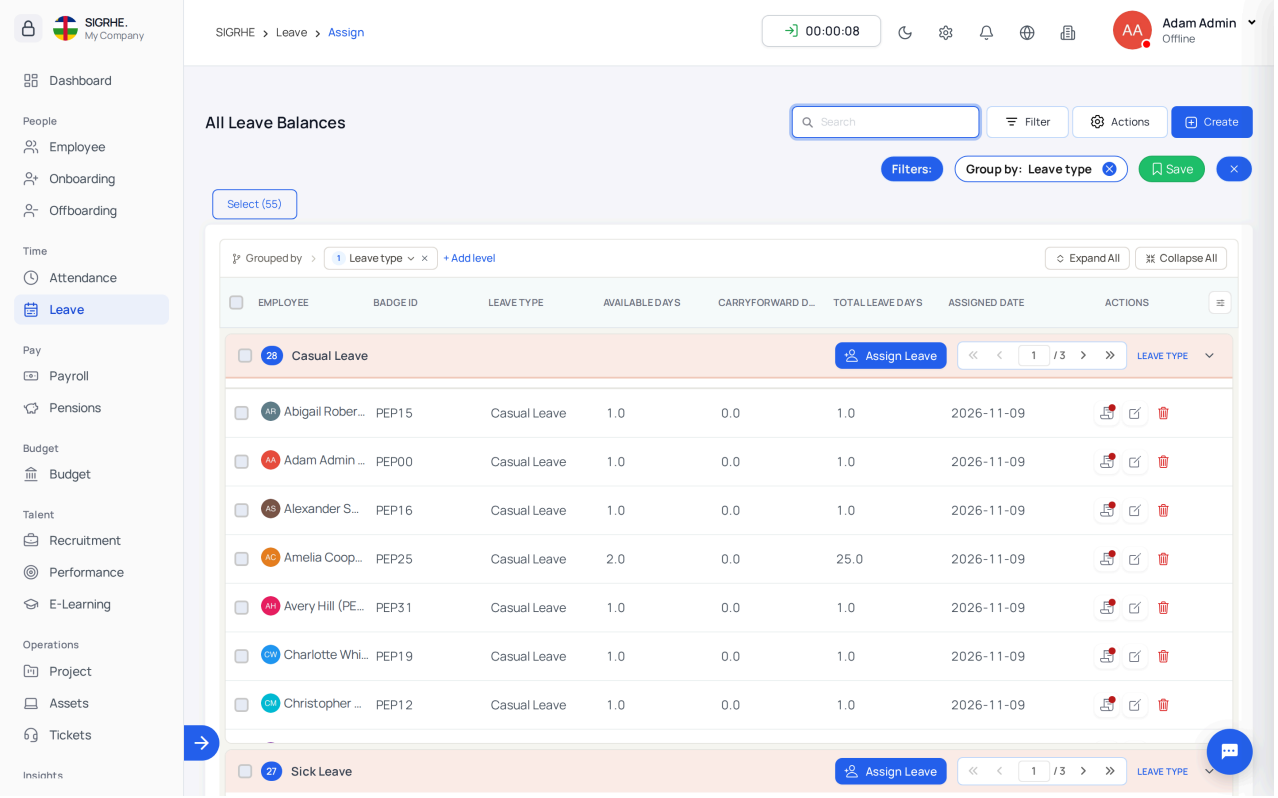
FIELD	DESCRIPTION
Name & Icon	Descriptive title (e.g., *Annual Leave*, *Sick Leave*, *Maternity Leave*) and visual icon.
Payment Type	**Paid**, **Unpaid**, or **Custom**. When set to Custom, define the **Payment Percentage** (0–100%, e.g., 50% for half-pay leaves).
Limit Leave Days & Total Days	Enforces a maximum balance quota (e.g., 20 days). When limited, requests exceeding the balance are blocked.
Encashable	Permits unused leave balances to be cashed out during financial settlements.
Require Approval	Selecting **No** approves employee requests automatically upon submission.
Require Attachment	Mandates uploading supporting documentation (e.g., medical certificates) when submitting requests.
Exclude Company Weekoff & Exclude Holidays	Automatically excludes designated weekly rest days or statutory holidays from the counted leave duration.

2. **Eligibility Conditions:** Restrict the leave type to qualifying workforce segments:
   - **Gender, Marital Status, Nationality:** (e.g., Maternity leave restricted to Female personnel).
   - **Department, Employment Type, Grade:** Target specific tiers or permanent staff.
   - **Service Duration:** Require a minimum tenure before the leave type becomes available.
   - **Once Per Employment:** Restricts the leave entitlement to a single lifetime grant per employee.

---

4. Managing Leave Balances & Ledgers

Navigation: `Leave → Leave Balances`



A balance represents a designated leave type quota assigned to an individual employee.

- **Assigning Balances:** Click **+ Assign**, choose the leave type, select target employees, and confirm. Employees who do not satisfy the eligibility criteria are automatically excluded.
- **Editing Balances:** Administrators can manually adjust available or carry-forward days.
- **Balance Ledger:** Open any employee balance record to inspect its detailed audit ledger, tracking every initial assignment, recurring reset, manual change, expiry, and deducted leave day with a running balance.

LEDGER ATTRIBUTE	DESCRIPTION
Available Days	Active leave quota available for the current cycle.
Carryforward Days	Unused days brought forward from preceding cycles.
Total Leave Days	Combined total available days (Available + Carryforward).
Assigned Date	Timestamp when the balance was granted.
Leave Reset Date	Scheduled calendar date for the next automated quota reset.
CarryForward Expired Date	Expiration timestamp for carry-forward days, if configured.

---

5. Resets & Carry-Forward Policies

Navigation: `Leave → Configuration → Leave Types → (Select Type)`

Enable **Reset** to automatically refresh leave balances on a cyclical schedule. Upon reset, available days revert to the configured **Total Days**.

Reset Schedules

- **Yearly:** Specify reset month and day (or last day of month).
- **Monthly:** Specify day of month.
- **Weekly:** Specify weekday.
- **Custom:** Specify interval in calendar days.

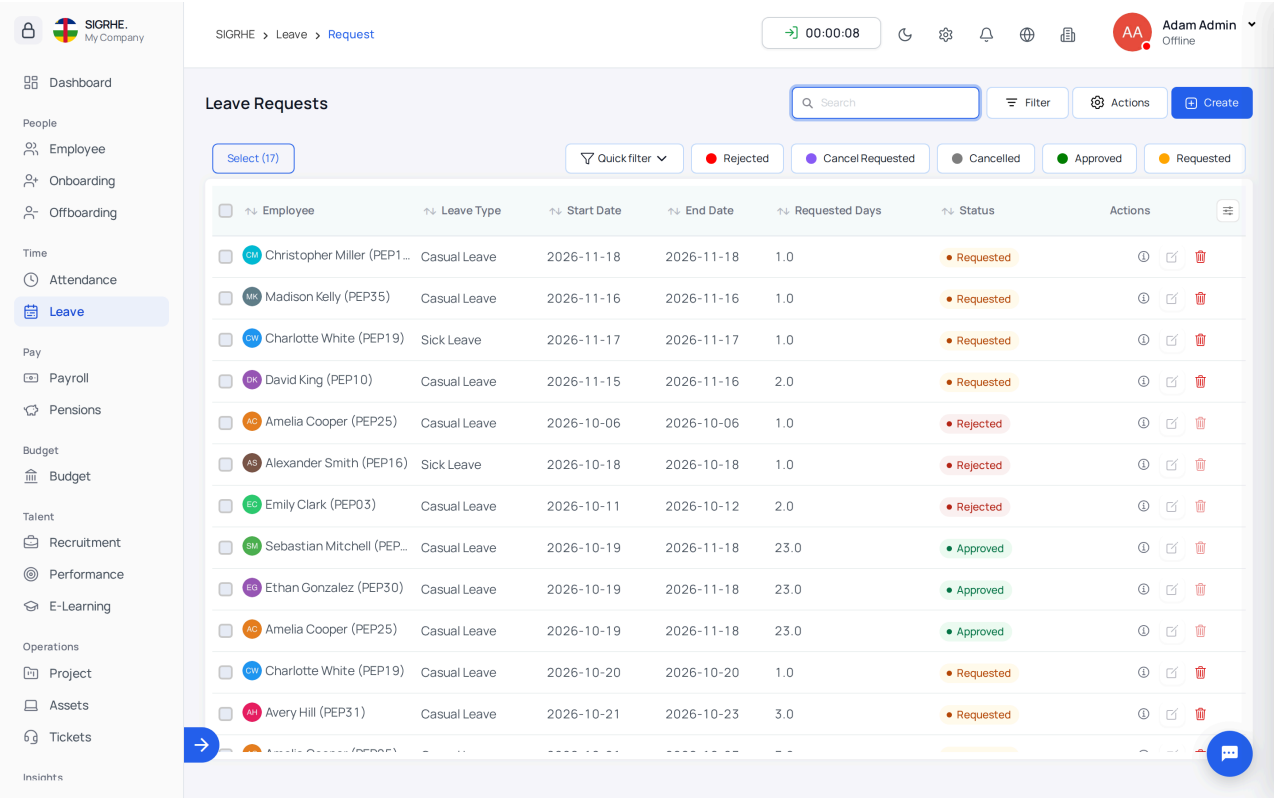
Carry-Forward Methods

- **No Carry Forward:** Unused balance days at the end of the cycle lapse immediately.
- **Carry Forward:** Unused days roll over up to the **Carryforward Max** limit.
- **Carry Forward with Expire:** Carried-over days expire after a designated duration (**Carryforward Expire In** days, months, or years).
  - **First Expiry Date:** All employees share a unified expiration date for rolled-over days.
  - **Employee Assignment Date:** Expiration is calculated individually relative to each employee's original balance assignment date.

---

6. Submitting & Reviewing Leave Requests

Navigation: `Leave → Leave Requests`



Employees initiate requests via **My Leave Requests**, while HR administrators can create requests on behalf of any employee.

1. Select the employee (admin only) and the desired **Leave Type**.
2. Specify date range. For partial days, configure **Full Day**, **First Half**, or **Second Half**.
3. Attach required documentation if mandated by the leave type policy.
4. The system validates balance limits, checks against restricted blackout dates, and detects team schedule clashes before saving.

STATUS	DEFINITION
Requested	Awaiting approval from designated managers or HR.
Approved	Approved; quota days deducted from balance and reflected on attendance logs.
Cancel Requested	Employee requested to revoke an approved leave; leave remains active until decision.
Cancelled	Leave officially withdrawn; deducted days are restored to the employee's balance ledger.
Rejected	Application denied; requires mandatory explanation notes.

---

7. Approval Workflows & Multiple Approval Rules

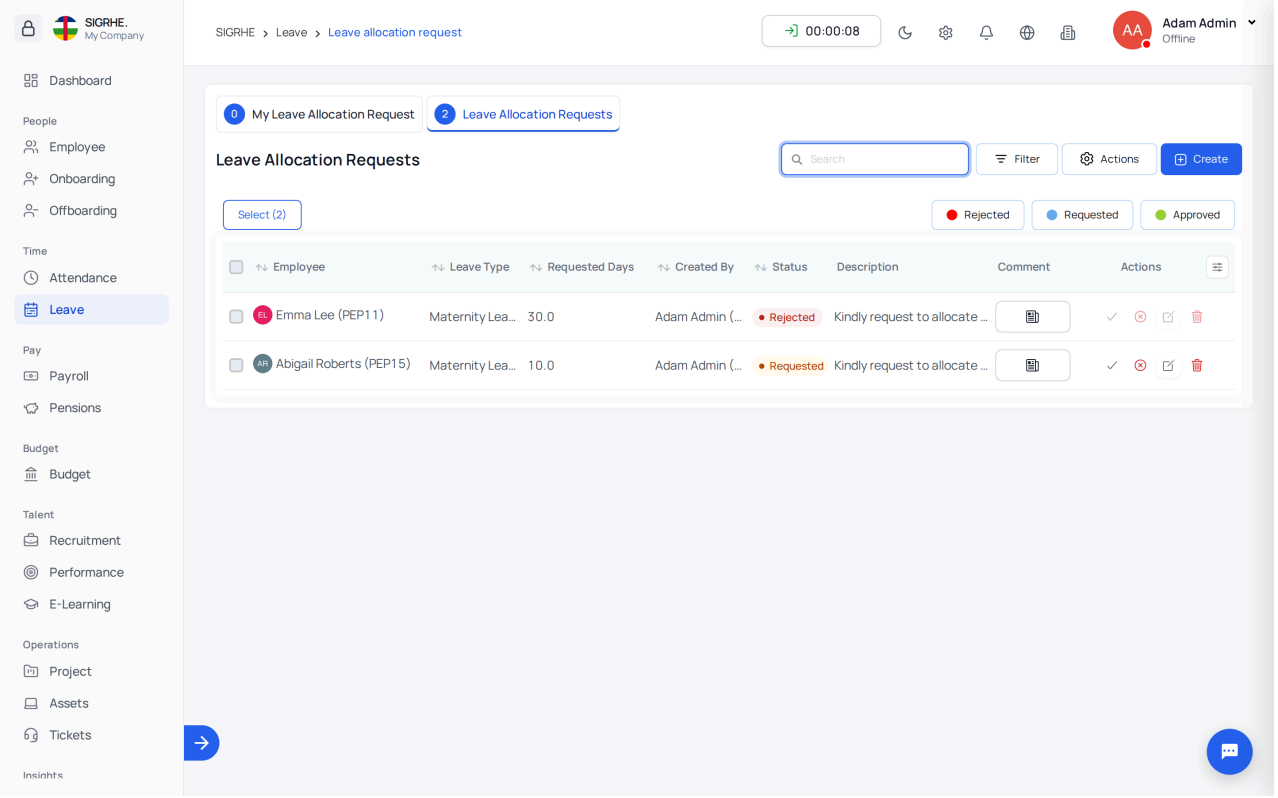
Standard leave requests route to the employee's assigned **Reporting Manager**. For complex or departmental workflows, configure multi-tier approval chains.

Navigation: `Leave → Configuration → Multiple Approval Rules`

- Create ordered approval sequences (e.g., Team Lead → Department Head → HR Director) triggered by conditions such as request duration or specific departments.
- A request is fully approved only when the final designated approver signs off. A rejection at any intermediate stage rejects the application immediately.

---

8. Cancellations & Leave Allocation Requests



Cancellation Workflow

- Requests in **Requested** status can be cancelled directly by the applicant.
- Approved requests require a formal cancellation application (**Cancel Requested**), notifying the reporting manager and HR. Upon administrative approval, the days are restored to the employee's balance.

Leave Allocation Requests

Navigation: `Leave → Leave Allocation Request` Employees can formally request supplementary leave days beyond their assigned quota. Approving an allocation request increments the employee's balance ledger accordingly.

Compensatory Leave

Navigation: `Leave → Compensatory Leave Requests` Allows employees to earn leave credit in exchange for working during public holidays or scheduled weekly off days (verified against the Attendance module). Once approved, compensatory days are credited to the employee's compensatory leave account.

---

9. Restricted Leave Periods

Navigation: `Leave → Restricted Leave Periods`

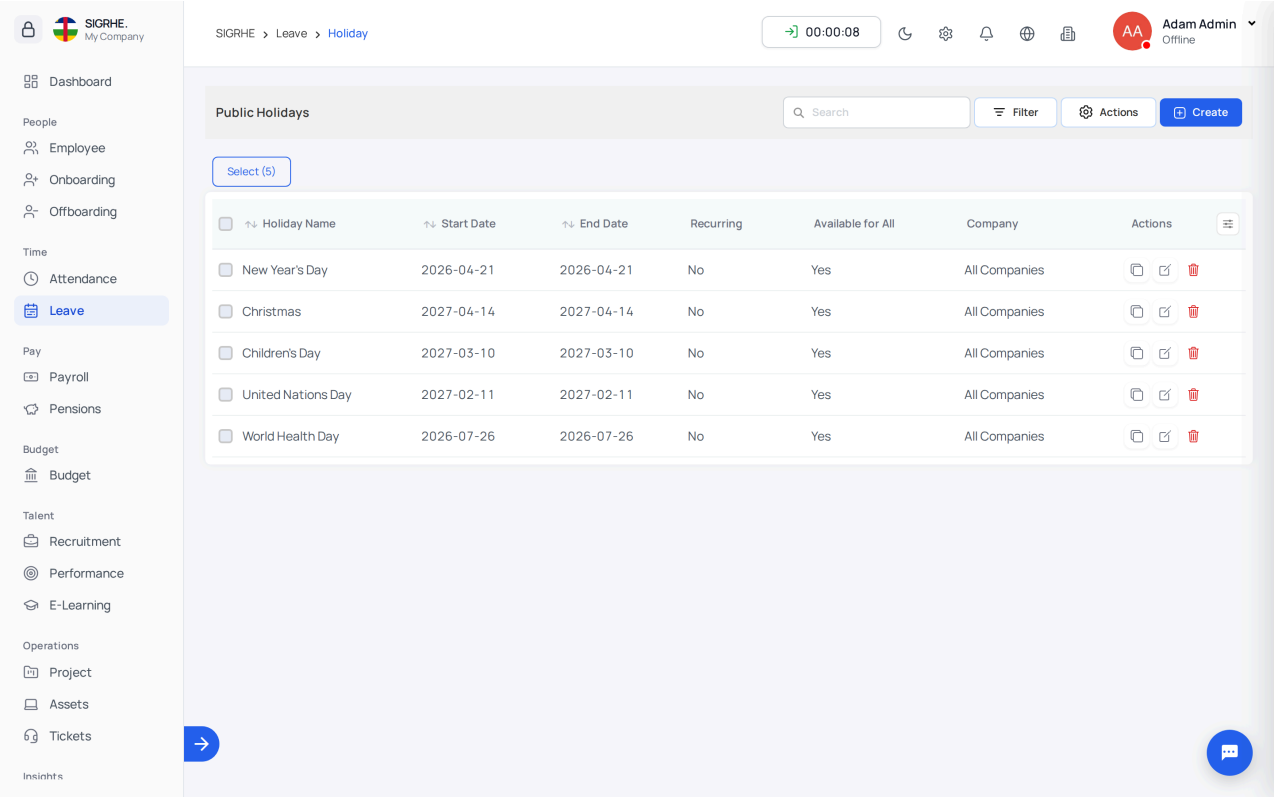
Enforce blackout windows (e.g., annual financial closing, peak operational cycles) during which leave applications are blocked.

- Specify blackout date boundaries.

- Restrict the blackout scope to the entire organization, specific departments, job positions, or designated leave types.

---

10. Public Holidays, Weekly Off Days & Rules



- **Public Holidays:** (`Leave › Public Holidays`) Managed directly under the Leave module, not in Settings. Define statutory holidays with name, start and end dates, an optional yearly recurring flag, and target entity scoping.
- **Weekly Off Days:** (`Settings › Organization › Weekly Off Days`) Configure organizational rest days (e.g., Saturday and Sunday, or alternating 2nd/4th weekends of the month).
- **Leave Rules:** (`Settings › Leave › Leave Rules`) Toggle global behaviors:
  - **Compensatory Leave:** Activates compensatory leave workflows for extra days worked.
  - **Restrict Past Date Leave:** Blocks standard employees from backdating leave requests, reserving retroactive entry privileges to administrators.
  - *Note:* Leave types and multi-tier approval rules are configured under `Leave › Configuration`.

Last updated: 10/24/25, 2:58 PM

Previous page
Attendance

Next page
Performance

Offboarding

The Offboarding module in NKL-HR governs employee departures, formal resignation approvals, exit stage pipelines, departmental handover task checklists, and automated user account archival.

1. Prerequisites & Setup Order

Before managing employee offboarding:

1. Determine whether employees can initiate self-service resignation requests under `Settings › Offboarding › Offboarding Rules`.
2. Configure the **Default Notice Period** (days between resignation and last working day, used when an approval has no end date and the employee has no active contract notice period).
3. Configure at least one operational **Exit Process** defining departure stages and checklists.

2. Process Workflow & Menu Overview

1. **Initiation:** An employee submits a resignation letter via self-service, or HR directly adds an employee to an exit process (e.g., contract completion or dismissal).
2. **Approval & Pipeline Entry:** Approving the resignation places the employee into the first stage of an exit process, establishing formal notice period boundaries.
3. **Task Completion:** Departmental managers (IT, Finance, Operations) execute assigned handover and clearance tasks.
4. **Archival:** Moving the leaver to the final **Archived** stage automatically deactivates their system login, blocks API/mobile access, and archives their employee profile.

MENU	PURPOSE
Dashboard	Visual analytics tracking departing personnel across exit processes and stages, pending task counts, and assets pending return.

MENU	PURPOSE
Resignation Letters	Review queue for employee resignation applications and withdrawal requests.
Exit Process	Multi-stage pipeline interfaces organizing leavers and tracking checklist completion.

---

3. Managing Resignation Letters

Navigation: `Offboarding → Resignation Letters`

STATUS	MEANING
Requested	Pending administrative or managerial review.
Approved	Resignation confirmed; employee is enrolled into the selected exit process.
Rejected	Application denied with mandatory justification notes. Cannot be reopened.
Cancellation Requested	Employee requested to withdraw an approved resignation application.
Cancelled	Resignation withdrawn and nullified.

An employee may maintain only one active letter record (*Requested*, *Approved*, or *Cancellation Requested*) at any time.

Approving a Resignation

1. Open the resignation letter and click **Approve**.
2. Select the designated **Exit Process** (e.g., *Standard Resignation*, *Executive Departure*).
3. Verify or adjust the **Notice Period Start** and **Notice Period End** dates. If left blank, the end date is derived automatically from the employee's active contract or system default notice duration.
4. Confirm approval. The employee is placed into the first exit stage and notified.

Handling Cancellations

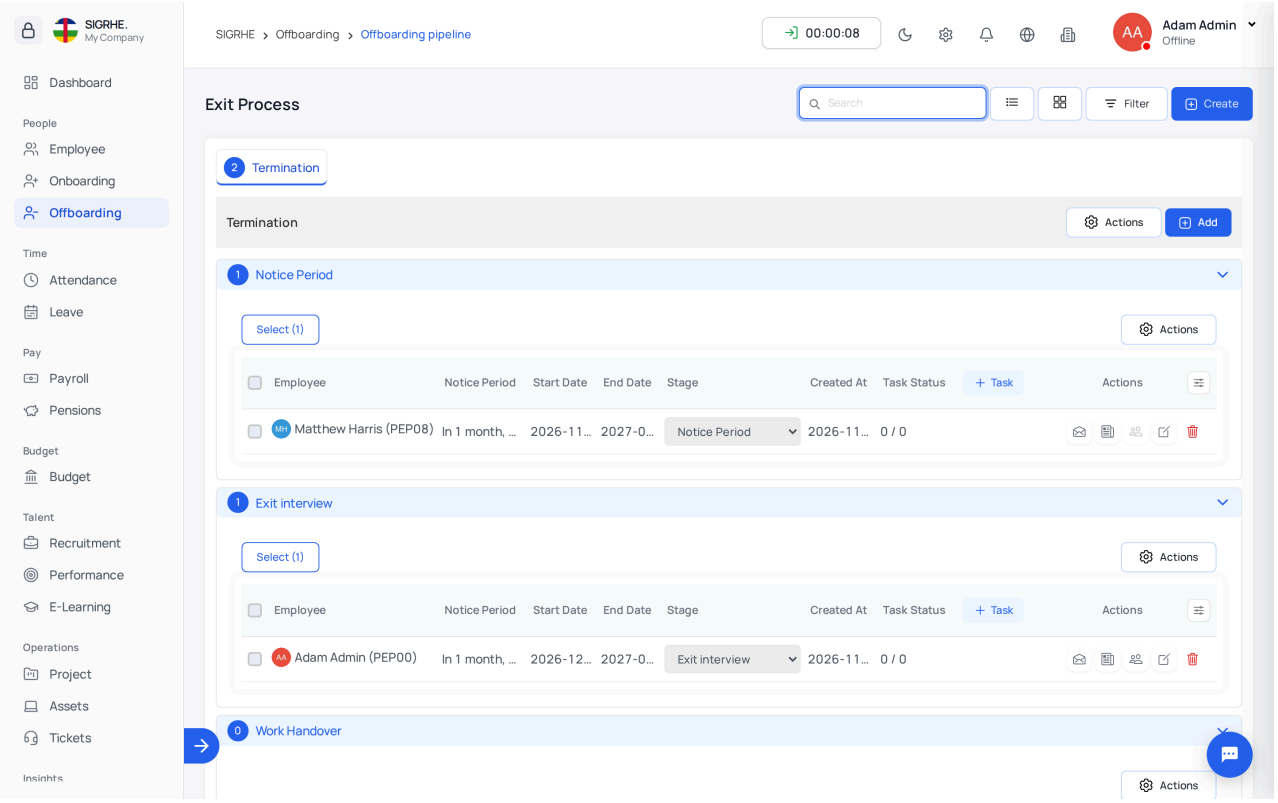
- Employees may immediately cancel a resignation that is still in **Requested** status.
- If a resignation is already **Approved**, the employee must submit a formal cancellation request (**Cancellation Requested**).

- HR reviews the cancellation request. Approval removes the employee from the exit process and restores standard active employment.

---

4. Configuring Exit Processes & Stages

Navigation: `Offboarding → Exit Process → + Create`



1. Provide a process title (e.g., *Standard Exit Process*, *Contract End Transition*), description, and process managers.
2. Saving creates the standard default stages automatically:
   - **Notice Period** (Type: Notice period)
   - **Exit Interview** (Type: Interview)
   - **Work Handover** (Type: Work handover)
   - **FNF** (Type: FnF Settlement / Full and Final Settlement)
   - **Farewell** (Type: Other)
   - **Archived** (Type: Archived)
3. Customize stages and order to reflect organizational requirements.

Stage Properties & Types

- **Title:** Name of the exit phase.
- **Type:** Categorizes the operational nature of the stage. Supported types: **Notice period**, **FnF Settlement**, **Interview**, **Work handover**, **Other**, and **Archived**.
- **Stage Managers:** Staff authorized to oversee and advance leavers in this stage.

> **Critical Rule:** Every exit process must retain exactly one stage of type **Archived** positioned as the final stage.

---

5. Exit Tasks & Checklists

Navigation: `Offboarding → Exit Process → (Select Process Tab)`

- **Create Tasks:** Click **+ Task** on any stage header. Specify **Title**, assign **Task Managers** (e.g., IT Support for asset recovery, Payroll for settlement calculations), and configure the **Required** flag.
- **Task Statuses:** Track execution using: **Todo**, **In progress**, **Stuck**, and **Completed**.
- **Stage Progression Lock:** If an employee has incomplete **Required** tasks in their current stage, attempting to advance them to the next stage is blocked until all required items are marked **Completed**.

---

6. Enrolling Leavers Directly into an Exit Process

Employees departing due to contract expiration, mutual agreement, or administrative dismissal can be enrolled directly without submitting a resignation letter.

Navigation: `Offboarding → Exit Process → (Select Process Tab) → Add Employee`

1. Select the target employee.
2. Define the notice period start and end dates.
3. Save. The employee is placed into the initial stage of the exit process.

Leaver Row Actions

Each row provides quick operational management tools:

- **Send Mail:** Dispatch formal departure notifications or clearance instructions.
- **Notes:** Record confidential offboarding notes with file attachments tied to the active stage.
- **Managing Records:** Displays critical responsibilities held by the employee (e.g., reportees, approval stages) to facilitate orderly reassignment.
- **Edit:** Adjust notice period dates or stage allocations.
- **Archive / Un-Archive:** Trigger immediate profile archival or restoration.

---

7. Archiving Leavers & Credential Deactivation

Advancing an employee into a stage of type **Archived** triggers automated offboarding finalization:

- The employee's master record is marked as archived.
- User account credentials, API access, and mobile application access are revoked immediately.
- If an archived employee is moved back to an earlier stage, their user account and active employment status are restored automatically.

> **Dependency Checks:** If the departing employee is still referenced as an active reporting manager, stage manager, or approval authority, those roles must be reassigned prior to final archival. Use the **Managing Records** utility to reassign active responsibilities.

---

8. Offboarding Rules & System Settings

Navigation: `Settings › Offboarding › Offboarding Rules`

SETTING	EFFECT
Allow Resignation Request	Enables self-service resignation submission for employees and exposes the Resignation Letters management queue.
Default Notice Period	Days between resignation and last working day, used when an approval has no end date and the employee has no active contract notice period.

Last updated: 10/24/25, 2:58 PM

Previous page
Performance

Next page
E-Learning

Onboarding

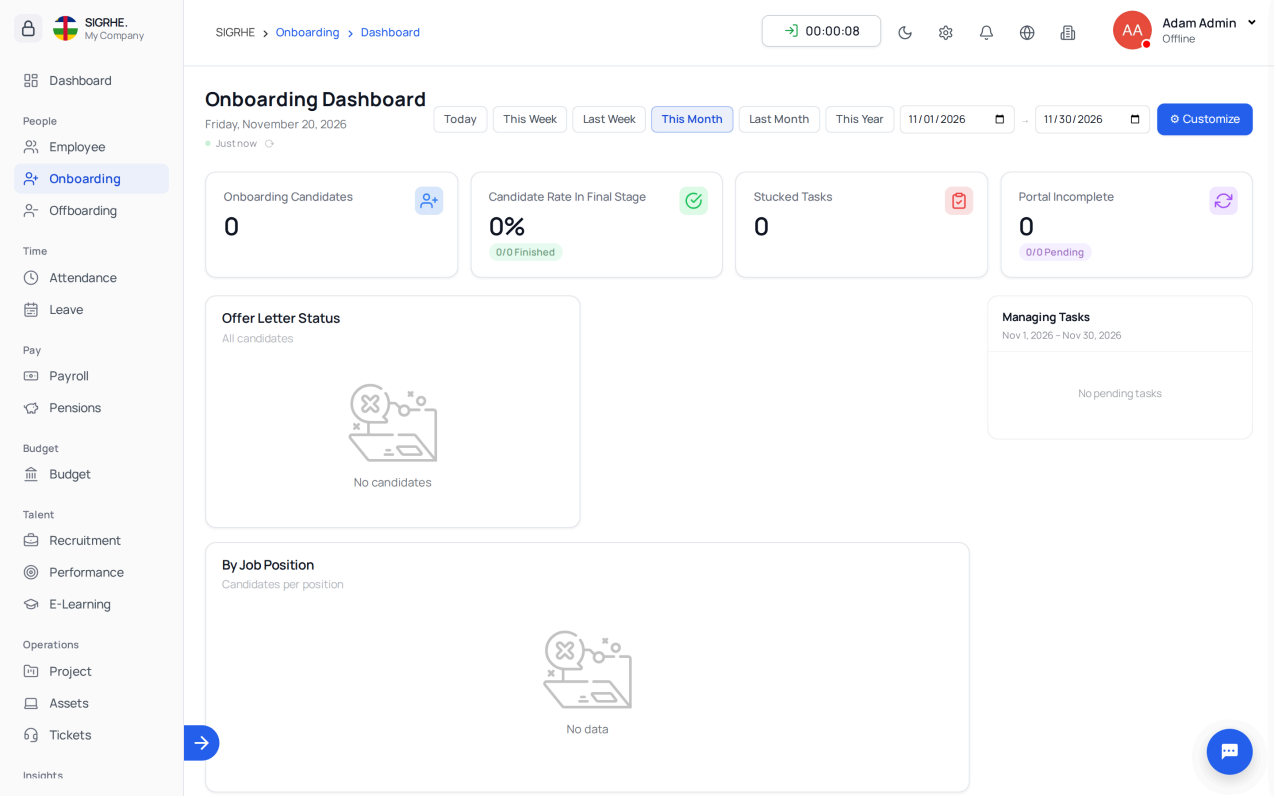
The Onboarding module in NKL-HR manages the transition of hired candidates into active employees through structured stage pipelines, task checklists, and a digital self-service onboarding portal.

1. Prerequisites & Setup Order

Before starting candidate onboarding:

- Ensure candidate records are in place (hired candidates eligible for onboarding).
- Verify mail server connectivity under `Settings → Email Servers`, as onboarding portal invitations are delivered via email.
- Prepare offer letter and welcoming templates under `Settings → Email Templates` if attachments or offer letters will be distributed during onboarding initiation.

2. Process Workflow & Menu Overview



1. **Candidate Selection:** Hired candidates appear in the Onboarding module.
2. **Onboarding Initiation:** HR sets joining dates, offer letter statuses, and either dispatches the digital portal link or initiates internal onboarding directly.
3. **Stage Progression:** Candidates enter the first onboarding stage. Stage and task managers execute onboarding checklists.
4. **Employee Conversion:** The new hire completes the self-service portal, creating their official employee profile and login account (or HR converts them directly).

MENU	PURPOSE
Dashboard	Candidate counts per stage and task progress. Click any status counter to open Onboarding Tasks filtered to bottlenecks or stuck tasks.
Candidates	Hired candidate directory: manage joining dates, track offer letter states, initiate onboarding, and dispatch portal invitations.
Onboarding Tasks	Pipeline interface showing candidate progression through stages, with granular task completion checklists.

---

3. Managing Hired Candidates

Navigation: `Onboarding → Candidates`

The candidate directory allows direct inline editing of key onboarding attributes:

- **Date of Joining:** Projected start date.
- **Probation Ends:** End of probation period (must not precede the joining date).

- **Offer Letter Status:** Track stages: **Not Sent**, **Sent**, **Accepted**, **Rejected**, or **Joined**.

Filtering & Quick Segmentation

- Visual filter indicators at the top allow quick segmentation:
  - **Joining Set** vs. **Joining Not-Set**
  - **Portal Send** vs. **Portal Not-Sent**
- **Bulk Update:** Select multiple candidates to set joining dates, probation ends, or job positions simultaneously.
- **Row Actions:** Access **Send Portal / Start Onboarding**, **Send Mail**, **Edit**, **Add To Rejected Candidates / Undo Rejected Candidate**, and **Delete**.
- Candidates already placed in an active pipeline display an **Added to Onboarding** badge.

---

4. Starting Onboarding & Dispatching the Portal

Navigation: `Onboarding → Candidates → Send Portal / Start Onboarding`

1. Select **Send Portal / Start Onboarding** on an individual candidate row or use `Actions → Send Portal` for bulk processing.
2. Specify or verify the **Joining Date** and **Probation End Date**.
3. Optionally attach documents: select system email templates (which are dynamically rendered as individualized candidate PDFs) or upload external onboarding packages.
4. Dispatch invitation.

Each candidate receives an email invitation containing a unique, secure, one-time link (Subject: *"Congratulations on your selection!"*). The candidate is automatically enrolled into the first onboarding stage.

> **Internal Onboarding Without Email:** To place a candidate into onboarding stages without dispatching an email portal link, select **Start Onboarding**.

---

5. Candidate Self-Service Portal

The one-time portal link enables new hires to configure their employee profile before their first working day. No pre-existing login credentials are required.

STEP	CANDIDATE ACTION	SYSTEM RESULT
1. Account	Enters and confirms a secure private password.	Login account prepared (work email serves as username).
2. Profile	Uploads a professional photograph.	Profile picture stored.

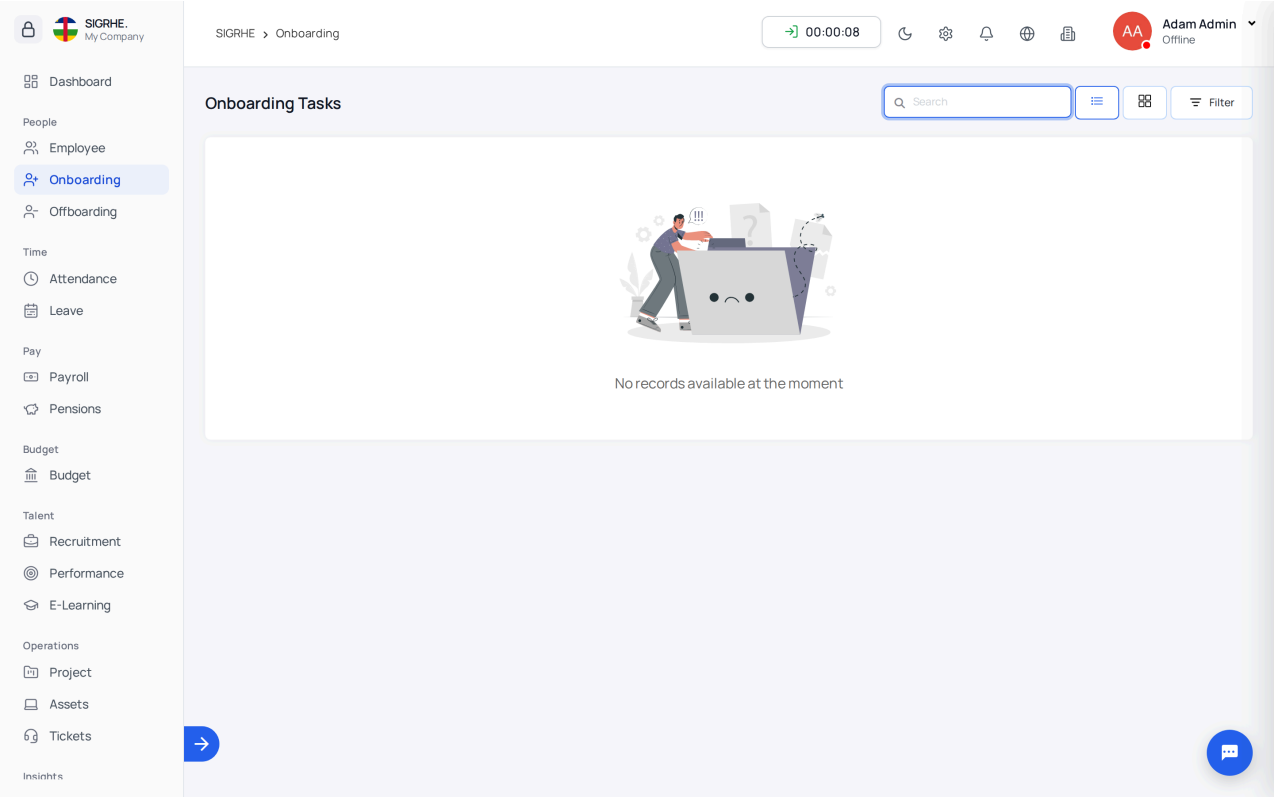
STEP	CANDIDATE ACTION	SYSTEM RESULT
Picture		
3. Personal Details	Completes and verifies personal, address, and emergency contact details.	**Employee profile created**; candidate is officially authenticated.
4. Bank Details	Enters banking details, routing codes, and branch information.	Onboarding portal completed; welcome page presented.

Upon completing Step 3, the employee record is generated and populated with pre-assigned work information (department, job position, company, joining date, and email). The one-time portal link is deactivated immediately upon completion.

---

6. Configuring Stages & Task Checklists

Navigation: `Onboarding → Onboarding Tasks`



Each recruitment pipeline features independent onboarding stages. An **Initial** stage is created by default.

Adding & Managing Stages

1. Open the recruitment actions menu and select **Add Stage**.
2. Specify the **Stage Title** (e.g., *Document Collection*, *IT Asset Provisioning*, *Department Induction*) and designate **Stage Managers**.
3. Check **Final Stage** if reaching this stage marks the formal completion of the candidate's onboarding.

4. Use **Manage Stage Order** to reorder workflow progression.

Creating Onboarding Tasks

1. Within any stage, click **+ Task**.
2. Enter the **Task Title** and designate specific **Task Managers** responsible for its execution.
3. Check **Required** if the task must be completed before the candidate can be moved to the subsequent onboarding stage.

---

7. Tracking Tasks & Advancing Candidates

Navigation: `Onboarding → Onboarding Tasks`

- Toggle between **List View** and **Card / Kanban View**.
- Update task states for each candidate directly on the grid: **Todo**, **Scheduled**, **Ongoing**, **Stuck**, or **Done**.
- **Advancing Stages:** In list view, update the **Stage** dropdown; in card view, drag the candidate card into the next stage column.
- **Bulk Progression:** Select candidates within a stage to update stages and task statuses in bulk.
- **Task Enforcement:** If a candidate has incomplete **Required** tasks in their current stage, the system blocks the transition and lists the outstanding required tasks.

---

8. Direct Conversion & Deletion Rules

Direct Conversion

Administrators can convert an active candidate directly into an employee record without requiring the candidate to complete the digital portal. This is used when HR enters personal and banking information on the employee's behalf.

Deletion Rules & System Integrity

To prevent data inconsistency, deletion restrictions are strictly enforced:

- A candidate cannot be deleted while assigned to an active onboarding stage, associated with onboarding tasks, or after a portal link has been dispatched.
- An onboarding stage cannot be deleted while it contains candidates.
- An onboarding task cannot be deleted while assigned to candidates.

Last updated: 11/3/25, 11:26 AM

Previous page
Candidate Portal (Self Tracking)

Next page
Employee

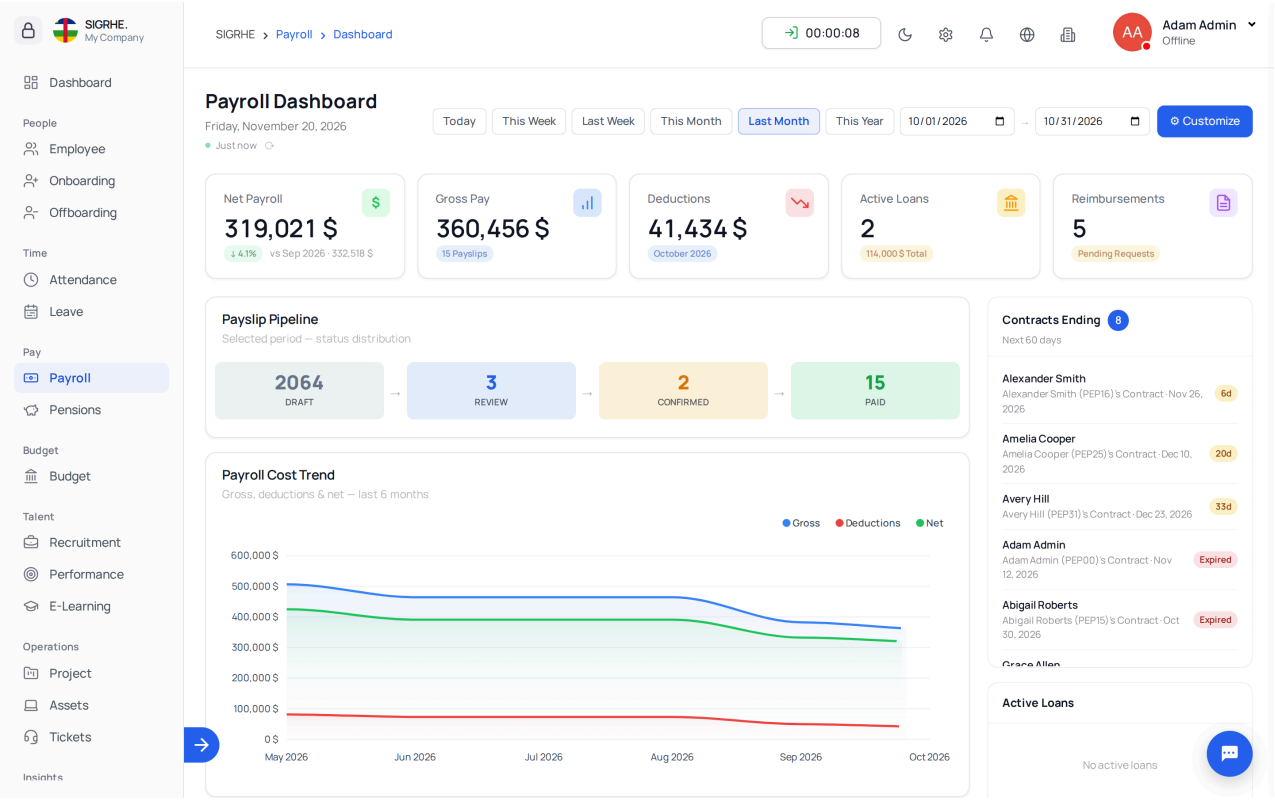
NKL-HR / HRMS / Payroll

Payroll

NKL-HR HRMS Software offers a comprehensive and efficient **payroll module** within its suite of features. The payroll software module in NKL-HR enables businesses to effectively manage employee allowances, deductions, taxes, and the generation of accurate payslips. With NKL-HR's payroll software, you can streamline your payroll processes and ensure timely and accurate salary calculations for your employees.

Dashboard Overview

The **Payroll Dashboard** within the HRMS provides HR professionals with a comprehensive overview of payroll activities. The dashboard displays key metrics related to payslip processing, enabling users to monitor and manage payroll status effectively.



Accessing the Payroll Dashboard

- Navigate to Payroll:

- On the left side menu, click on **Payroll**.
- Select **Dashboard** from the dropdown list.
- The Payroll Dashboard displays a summary of payroll activities in a graphical and tabular format.

Key Components of the Payroll Dashboard

1. Payroll Status Overview

- **Paid:** Displays the number of payslips marked as paid for the selected month and year.
- **Confirmed:** Shows the number of confirmed payslips.
- **Review Ongoing:** Indicates the number of payslips currently under review.
- **Draft:** Displays the number of payslips saved as drafts.
- **Month and Year Selection:**
  - Use the dropdown menu to select a specific month and year to filter the payroll data displayed on the dashboard.

2. Employee Payslips Graph

- **Graph Display:**
  - A bar graph representing the status of employee payslips (Draft, Review Ongoing, Confirmed, Paid) is displayed.
  - The Y-axis represents the amount, and the X-axis employee.
  - Color coding helps distinguish between different statuses:
    - **Red:** Draft
    - **Yellow:** Review Ongoing
    - **Blue:** Confirmed
    - **Green:** Paid

3. Payslip Summary

- **Total Payslips Generated:**
  - Indicates the total number of payslips generated for the selected period.
- **Total Amount:**
  - Displays the total amount processed in payslips.
- **Department Total Amount:**
  - Breaks down the total amount by department, listing individual department totals.

4. Export Option

- **Export Button:**

- The **Export** button allows users to download the payroll data in various formats (e.g., CSV, PDF).
- Located at the top right of the Payroll Status Overview section.

5. Employer Contributions

- **Employee Selection:**
  - A dropdown menu to select an employee to view their specific employer contributions.
- **Contribution Summary:**
  - Displays a breakdown of contributions made by the employer for the selected employee.

Filtering and Exporting Data

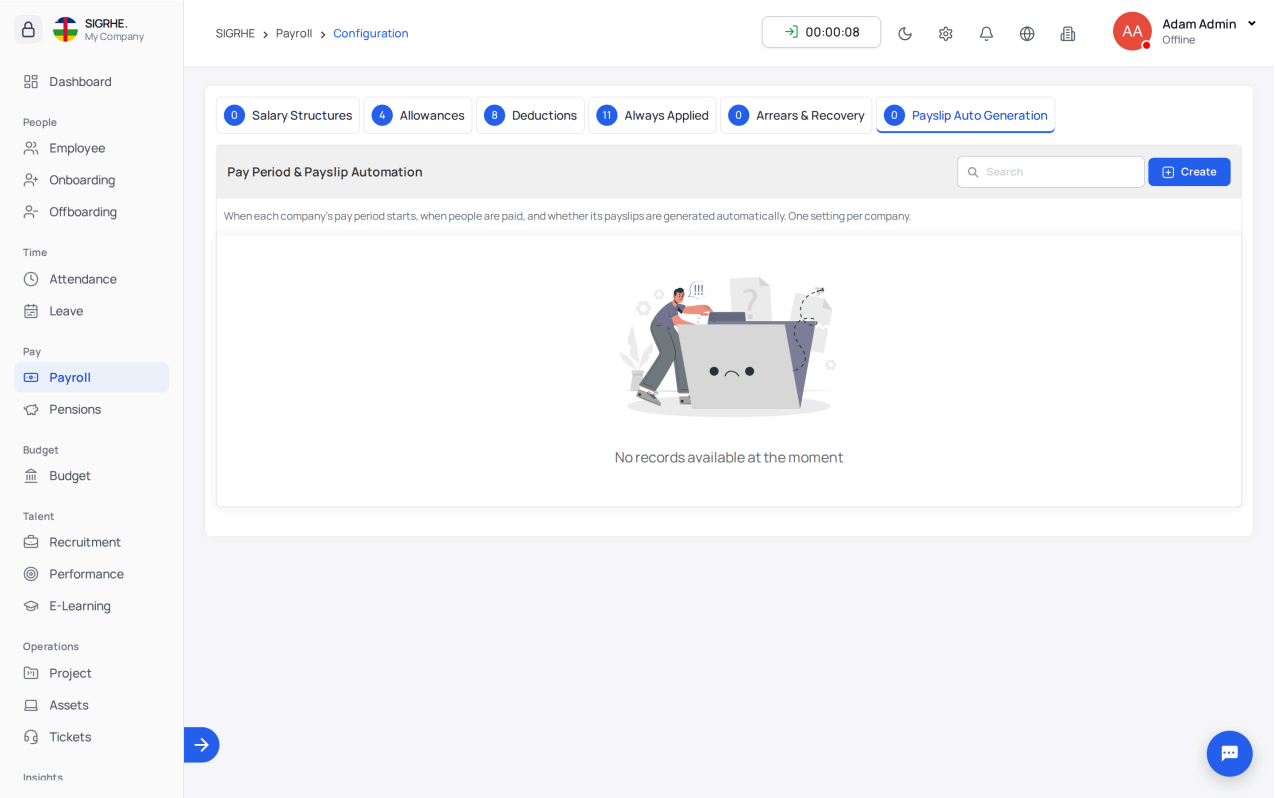
- **Filtering:**
  - Use the filtering options to narrow down payroll data by specific criteria such as month, year, or employee.
- **Exporting Data:**
  - Click on the **Export** button to save payroll data in your preferred format. This allows for easy reporting and record-keeping.

Last updated: 10/24/25, 2:58 PM

Next page
Introduction

Allowance Management

The Allowances section within the Payroll module of the HRMS enables HR professionals to manage employee allowances effectively. Users can create, view, edit, and delete allowances, ensuring all allowance-related details are accessible and organized.



Accessing the Allowances Section

- **Navigate to Payroll:**
  - On the left side menu, click on **Payroll**.
  - Select **Allowances** from the dropdown list.
  - The Allowances page displays a list of all allowances in a table format.

Working with the Allowances Table

The Allowances table provides a detailed view of all defined allowances, with columns for:

- **Allowance:** The name of the allowance.
- **Specific Employees:** Employees selected to receive this allowance.

- **Excluded Employees:** Employees excluded from receiving this allowance.
- **Is Taxable:** Indicates if the allowance is taxable.
- **Is Condition Based:** Shows if the allowance is based on specific conditions.
- **Condition:** The criteria used to determine eligibility for the allowance.
- **Is Fixed:** Indicates if the allowance amount is fixed.
- **Amount:** The monetary value of the allowance.
- **Based On:** The attribute used for conditional allowances (e.g., Basic Pay).
- **Actions:** Buttons to view, edit, or delete the allowance.

Filtering and Grouping Allowances

- **Filter Allowances:**
  - Click on the **Filter** button to narrow down allowances based on specific criteria like taxable status, condition, or specific employees.

Creating a New Allowance

- Click on the **+ Create** button at the top-right corner of the Allowances page.
- Fill in the allowance details:
  - **Title:** Enter the name of the allowance.
  - **One-Time Date:** Set a specific date for one-time allowances, if applicable.
  - **Include All Active Employees:** Toggle on if the allowance applies to all employees.
  - **Specific Employees:** Select specific employees, if applicable.
  - **Is Taxable:** Toggle on if the allowance is taxable.
  - **Is Fixed:** Toggle on if the allowance amount is fixed.
  - **Amount:** Enter the amount of the allowance.
  - **If Condition Based:** Toggle on if the allowance depends on conditions.
  - **Condition:** Select the condition and value (e.g., Basic Pay > 5000).
  - **Filter:** Further filter based on criteria such as department, position, etc.
- Save the allowance by clicking the **Save** button.

Editing and Deleting Allowances

- **To Edit an Allowance:**
  - Click the **Edit** icon next to the allowance in the Actions column.
  - Make the necessary changes and save.
- **To Delete an Allowance:**

- Click the **Delete** icon next to the allowance in the Actions column.
- Confirm the deletion.

Last updated: 10/24/25, 2:58 PM

Previous page
Income Tax (Filing Status)

Next page
Deductions

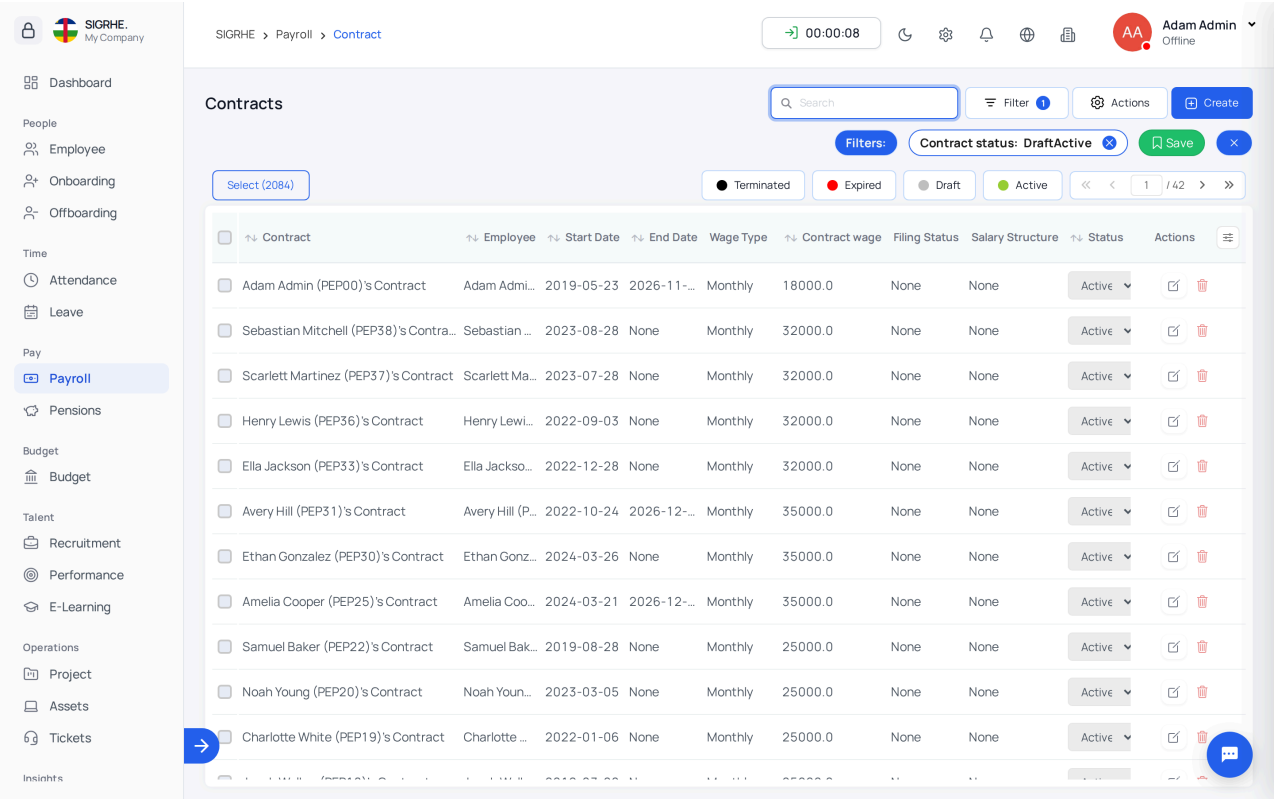
Contracts

The **Contracts** section within the Payroll module of the HRMS allows HR professionals to manage employee contracts efficiently. Users can create, view, edit, and delete contracts, ensuring all employee contractual information is accessible and organized.

Accessing the Contracts Section

- **Navigate to Payroll:**
  - On the left side menu, click on **Payroll**.
  - Select **Contracts** from the dropdown list.
  - The Contracts page displays a list of all employee contracts in a table format.

Working with the Contracts Table



The Contracts table provides a detailed view of all contracts, with columns for:

- **Contract**: The name and unique identifier of the contract.
- **Employee**: The employee associated with the contract.

- **Start Date**: The starting date of the contract.
- **End Date**: The contract's end date, if applicable.
- **Wage Type**: The type of wage (e.g., Monthly).
- **Basic Salary**: The base salary defined in the contract.
- **Filing Status**: The tax filing status for the contract.
- **Status**: Indicates the contract's state (Active, Draft, Expired, Terminated).
- **Actions**: Buttons to view, edit, or delete the contract.

Filtering and Grouping Contracts

- **Filter Contracts:**
  - Click on the **Filter** button to narrow down the contracts based on specific criteria like employee name, start date, status, etc.
- **Group By:**
  - Use the **Group By** feature to organize contracts by categories like employee name, contract status, or wage type.

Creating a New Contract

- **Click on the + Create button** at the top-right corner of the Contracts page.
- **Fill in the contract details:**
  - **Employee**: Select the employee.
  - **Contract start date**: Set the start date.
  - **Wage Type**: Choose the wage type (e.g., Monthly).
  - **Basic Salary**: Enter the base salary.
  - **Filing Status**: Select the filing status.
  - Additional fields such as Department, Job Position, Work Type, etc., can also be filled in as needed.
- **Save the contract** by clicking the **Save** button.

Editing and Deleting Contracts

- **To Edit a Contract:**
  - Click the **Edit** icon next to the contract in the Actions column.
  - Make the necessary changes and save.
- **To Delete a Contract:**
  - Click the **Delete** icon next to the contract in the Actions column.
  - Confirm the deletion.

Exporting Contracts

Exporting Individual Contracts:

- **Select Contracts:** Select the contracts you wish to export by checking the boxes next to them.
- **Export Button:** Once contracts are selected, an **Export** button will appear next to the **Select All** option.
- **Export Format:** Choose the desired format (e.g., CSV, PDF).
- **Download:** Download the file to save a copy of the contract details.

Bulk Exporting via the Actions Menu:

- **Bulk Status Change:**
  - Select multiple contracts from the table.
  - Use the **Bulk Status Change** feature in the **Actions** menu to change the status of all selected contracts at once.
- **Export with Filter:**
  - In the **Actions** menu, select the **Export** option.
  - Use the filter options provided to refine which contracts to export based on specific criteria.
  - Choose the desired format (e.g., CSV, PDF) and download the file.
- **Bulk Deletion:**
  - Similar to bulk status changes, contracts can be selected and deleted in bulk using the **Delete** option in the **Actions** menu.

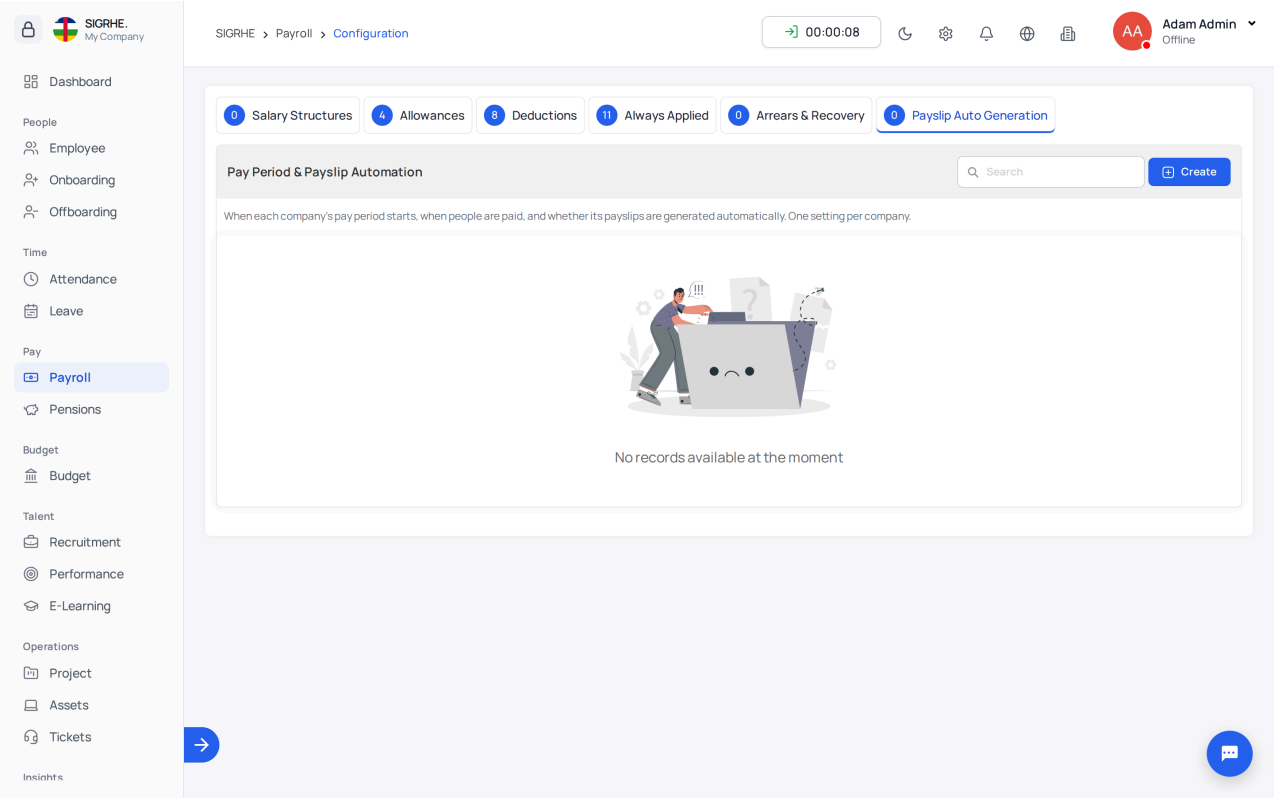
Last updated: 10/24/25, 2:58 PM

Previous page
Payroll

Next page
Payslips

Deduction Management

The Deductions section within the Payroll module of the HRMS allows HR professionals to manage employee deductions efficiently. Users can create, view, edit, and delete deductions, ensuring all deduction-related details are accessible and organized.



Accessing the Deductions Section

- **Navigate to Payroll:**
  - On the left side menu, click on **Payroll**.
  - Select **Deductions** from the dropdown list.
  - The Deductions page displays a list of all deductions in a table format.

Working with the Deductions Table

The Deductions table provides a detailed view of all defined deductions, with columns for:

- **Deduction:** The name of the deduction.
- **Specific Employees:** Employees selected to have this deduction applied.
- **Excluded Employees:** Employees excluded from this deduction.

- **Is Pretax:** Indicates if the deduction is applied before taxes.
- **Is Condition Based:** Shows if the deduction is based on specific conditions.
- **Condition:** The criteria used to determine eligibility for the deduction.
- **Is Fixed:** Indicates if the deduction amount is fixed.
- **Based On:** Shows whether the basic pay or gross pay.
- **Actions:** Buttons to view, edit, or delete the deduction.

Filtering and Grouping Deductions

1. **Filter Deductions:**
    - Click on the **Filter** button to narrow down deductions based on specific criteria like pretax status, condition, or specific employees.

Creating a New Deduction

- **Click on the + Create button** at the top-right corner of the Deductions page.
- **Fill in the deduction details:**
    - **Title:** Enter the name of the deduction.
    - **One-Time Date:** Set a specific date for one-time deductions, if applicable.
    - **Include All Active Employees:** Toggle on if the deduction applies to all employees.
    - **Specific Employees:** Select specific employees, if applicable.
    - **Is Tax:** Toggle on if the deduction is taxable.
    - **Is Pretax:** Toggle on if the deduction is applied before taxes.
    - **Is Condition Based:** Toggle on if the deduction depends on conditions.
    - **Update Compensation:** Choose whether the deduction will update the compensation package.
    - **Is Fixed:** Toggle on if the deduction amount is fixed.
    - **Amount:** Enter the amount of the deduction.
    - **If Condition Based:** Set the conditions and values (e.g., Basic Pay > 5000).
    - **Filter:** Further filter based on criteria such as department, position, etc.
- **Save the deduction** by clicking the **Save** button.

Editing and Deleting Deductions

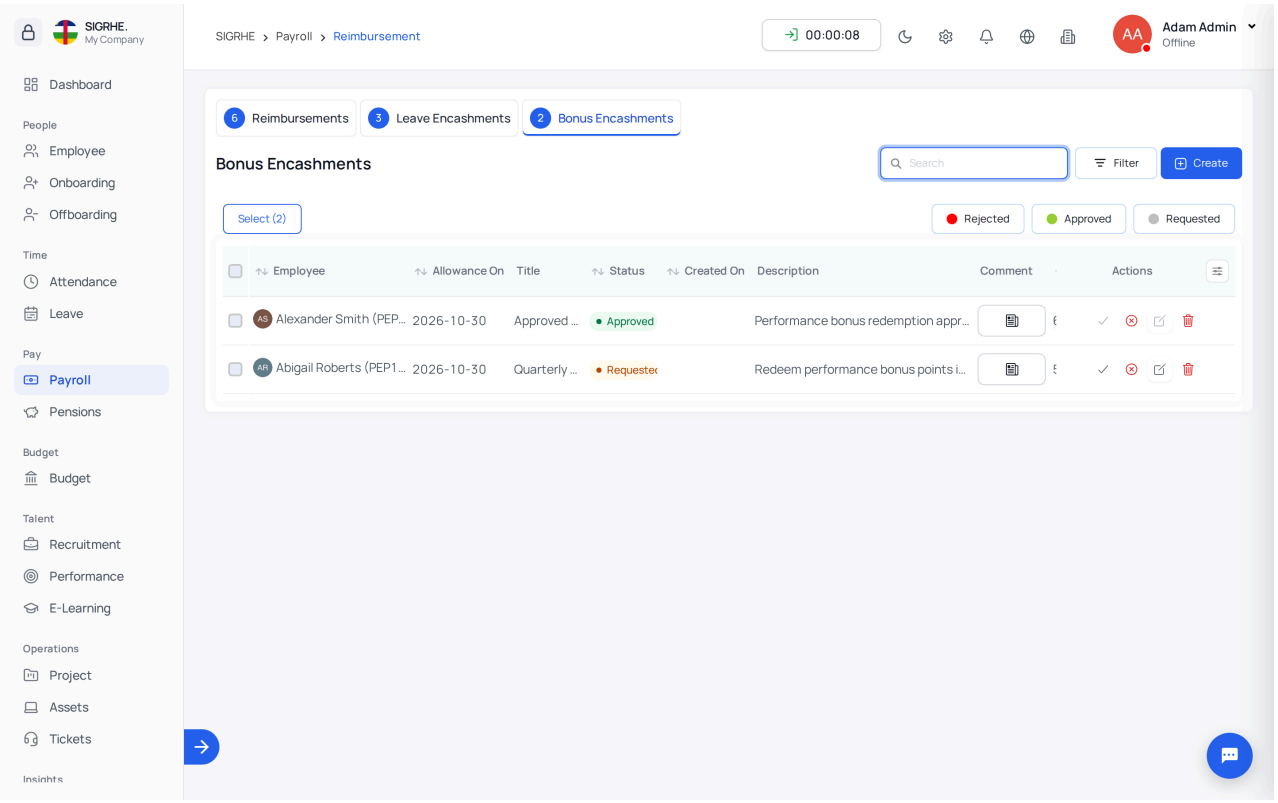
- **To Edit a Deduction:**
    - Click the **Edit** icon next to the deduction in the Actions column.
    - Make the necessary changes and save.
- **To Delete a Deduction:**
    - Click the **Delete** icon next to the deduction in the Actions column.
    - Confirm the deletion.

Last updated: 10/24/25, 2:58 PM

Previous page
Allowances

Next page
Attendance

Bonus Point Encashment



Accessing the Bonus Point

1. Navigate to **Payroll**:
    - On the left side menu, click on **Payroll**.
    - Select **Encashments & Reimbursements** from the dropdown list.
    - Switch to the **Bonus Encashments** tab.
2. The Bonus Point Encashment page displays a list of all encashment entries in a table format.

Working with the Bonus Point Encashment Table

The Bonus Point Encashment table provides a detailed view of all defined encashments, with columns for:

- **Title**: The title or description of the encashment.
- **Employee**: The employee receiving the encashment.
- **Points**: The total points being encashed.

- **Encashment Amount**: The amount received for the encashment.
- **Status**: Indicates whether the encashment is approved, pending, or rejected.
- **Actions**: Buttons to view, edit, or delete the encashment entry.

Filtering and Grouping Bonus Point Encashments

- **Filter Bonus Point Encashments**: Click on the **Filter** button to narrow down encashments based on specific criteria such as employee, status, or date.
- **Group By**: Use the **Group By** feature to organize encashments by categories like status or employee.

Creating a New Bonus Point Encashment

1. Click on the **+ Create** button at the top-right corner of the Bonus Point Encashment page.
2. Fill in the encashment details:
   - **Title**: Enter the title or description of the encashment.
   - **Employee**: Select the employee receiving the encashment.
   - **Points**: Enter the total points being encashed.
   - **Encashment Amount**: Enter the amount for the encashment.
   - **Description**: Provide a detailed description of the encashment.
   - **Attachments**: Upload any relevant documents.
3. Save the encashment by clicking the **Save** button.

Editing and Deleting Bonus Point Encashments

- **To Edit a Bonus Point Encashment**: Click the **Edit** icon next to the encashment in the Actions column. Make the necessary changes and save.
- **To Delete a Bonus Point Encashment**: Click the **Delete** icon next to the encashment in the Actions column. Confirm the deletion.

Exporting Bonus Point Encashments

- Go to the **Actions** menu in the Bonus Point Encashment section.
- Select **Export** and choose the desired format (e.g., CSV, PDF).
- Download the file to save a copy of the encashment details.

Leave Encashment

Accessing the Leave Encashment Section

- Navigate to **Payroll**:
  - On the left side menu, click on **Payroll**.
  - Select **Encashments & Reimbursements** from the dropdown list.
  - Switch to the **Leave Encashments** tab.
- The Leave Encashment page displays a list of all encashment entries in a table format.

Working with the Leave Encashment Table

The Leave Encashment table provides a detailed view of all defined encashments, with columns for:

- **Employee**: The employee requesting the leave encashment.
- **Date**: Encashment affected payroll date.
- **Title**: The title of the leave encashment.
- **Amount**: The amount received for the leave encashment.
- **Leave Type**: The type of leave being encashed (e.g., Casual Leave, Sick Leave).
- **Available Days to Encash**: The number of leave days available for encashment.
- **Carryforward to Encash**: The number of leave days carried forward for encashment.
- **Status**: Indicates whether the encashment is approved, pending, or rejected.
- **Description**: Additional details provided for the leave encashment.
- **Comment**: Remarks or comments regarding the leave encashment.
- **Actions**: Buttons to view, edit, or delete the encashment entry.
- **Confirmation**: The approve and reject buttons.

Filtering Leave Encashments

- **Filter Leave Encashments**: Click on the **Filter** button to narrow down encashments based on specific criteria such as employee, status, or date.

Creating a New Leave Encashment

- **Click on the + Create button**:
  - Located at the top-right corner of the Leave Encashment page.
- **Fill in the leave encashment details**:
  - **Title**: Enter the title or description of the leave encashment.
  - **Type**: Select the encashment type, typically **Leave Encashment**.
  - **Employee**: Select the employee requesting the leave encashment.
  - **Allowance on**: Enter the date of the encashment (e.g., 08/29/2024).
  - **Leave Type**: Select the type of leave being encashed.
  - **Available Days**: Enter the number of leave days available for encashment.
  - **Carry Forward Days**: Enter the number of leave days carried forward for encashment.
  - **Description**: Provide a detailed description of the leave encashment.

- **Save**:
  - Click the **Save** button to save the leave encashment record.

Editing and Deleting Leave Encashments

- **To Edit a Leave Encashment**: Click the **Edit** icon next to the encashment in the Actions column. Make the necessary changes and save.
- **To Delete a Leave Encashment**: Click the **Delete** icon next to the encashment in the Actions column. Confirm the deletion.

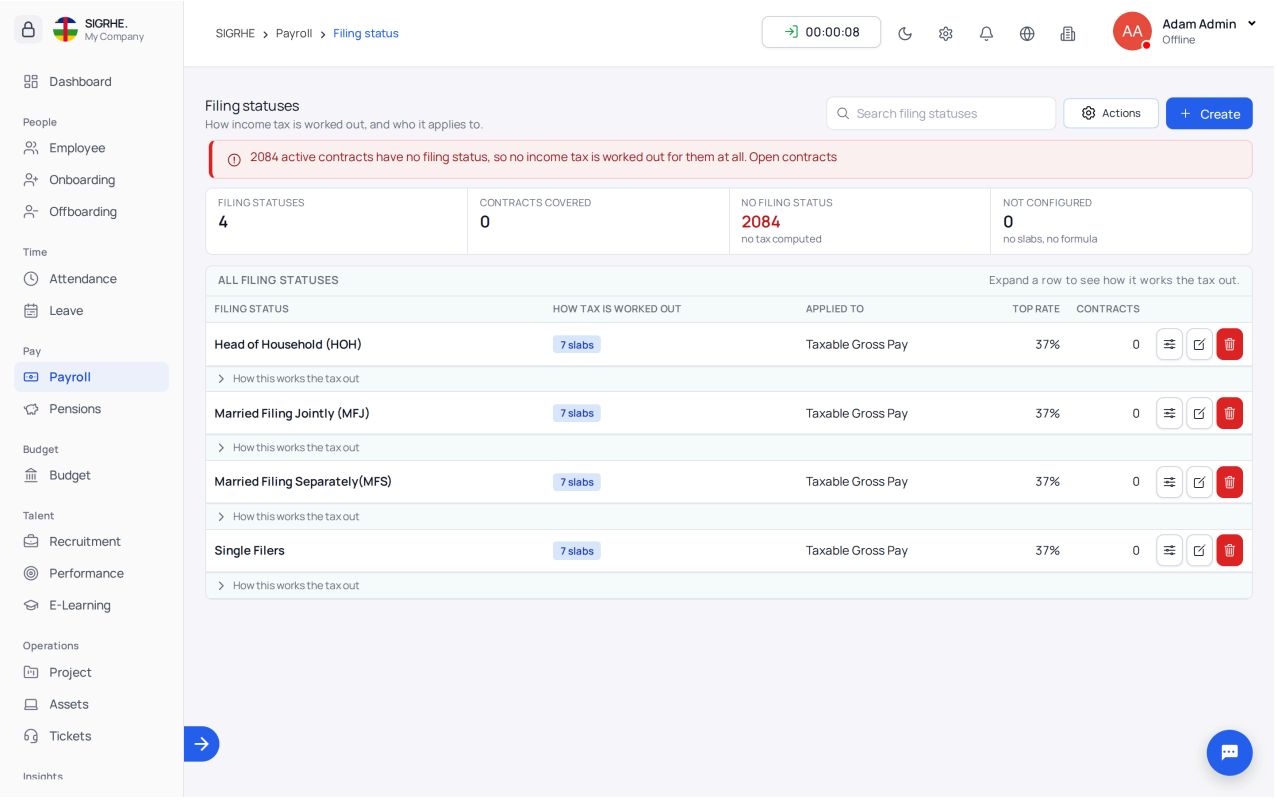
Last updated: 10/24/25, 2:58 PM

Previous page
Reimbursements

Next page
Income Tax (Filing Status)

Income Tax & Filing Status (Federal Tax)

The Filing Status and Tax Bracket sections within the Payroll module of the HRMS system allow HR professionals to manage tax-related configurations efficiently. These sections provide features to create, view, edit, and delete filing statuses and tax brackets, ensuring that all tax-related details are organized and accessible.



Accessing the Filing Status Section

Navigate to Payroll:

1. On the left side menu, click on **Payroll**.
2. Select **Filing Status** from the dropdown list.

The Filing Status page displays a list of all filing statuses in a table format.

Working with the Filing Status Table

The Filing Status table provides a detailed view of all defined filing statuses, with columns for:

- **Tax Rate:** The percentage of tax applied.
- **Min. Income:** The minimum income range for this tax rate.
- **Max. Income:** The maximum income range for this tax rate.

Actions:

- **Create:** To create a new tax bracket for the selected filing status.
- **Update:** To edit an existing tax bracket.
- **Delete:** To remove an existing tax bracket.

Creating a New Filing Status

1. Click on the **+ Create** button next to the search bar at the top-right corner of the Filing Status page.
2. Fill in the filing status details:
   - **Filing status:** Name of the filing status.
   - **Based on:** Choose the income basis (e.g., Taxable Gross Pay).
   - **Python Code:** Checkbox to indicate whether a custom Python script is applied.
   - **Description:** Optional description of the filing status.
3. Save the filing status by clicking the **Save** button.

Deleting Filing Statuses

To Delete a Filing Status:

1. Click the **Delete** icon next to the filing status in the Actions column.
2. Confirm the deletion.

Accessing the Tax Bracket Actions Menu

Navigate to Payroll:

1. On the left side menu, click on **Payroll**.
2. Select **Filing Status** from the dropdown list.

Opening the Actions Menu:

1. On the Filing Status page, click the **Actions** button next to the filing status to open a dropdown menu.

Actions Menu Options

The Actions menu provides features related to the tax brackets within a filing status:

Creating a New Tax Bracket:

1. Click on the **Create** button inside the Actions dropdown for the relevant filing status.
2. Fill in the tax bracket details:
    - **Min. Income:** The lower limit of the income range.
    - **Max. Income:** The upper limit of the income range.
    - **Tax Rate:** The tax percentage to be applied.
3. Save the tax bracket by clicking the **Save** button.

Updating a Tax Bracket:

1. Click on the **Update** button inside the Actions dropdown for the relevant filing status.
2. Modify the required fields for the selected tax bracket.
3. Save the changes by clicking the **Save** button.

Deleting a Tax Bracket:

1. Click the **Delete** icon next to the tax bracket in the Actions column.
2. Confirm the deletion.

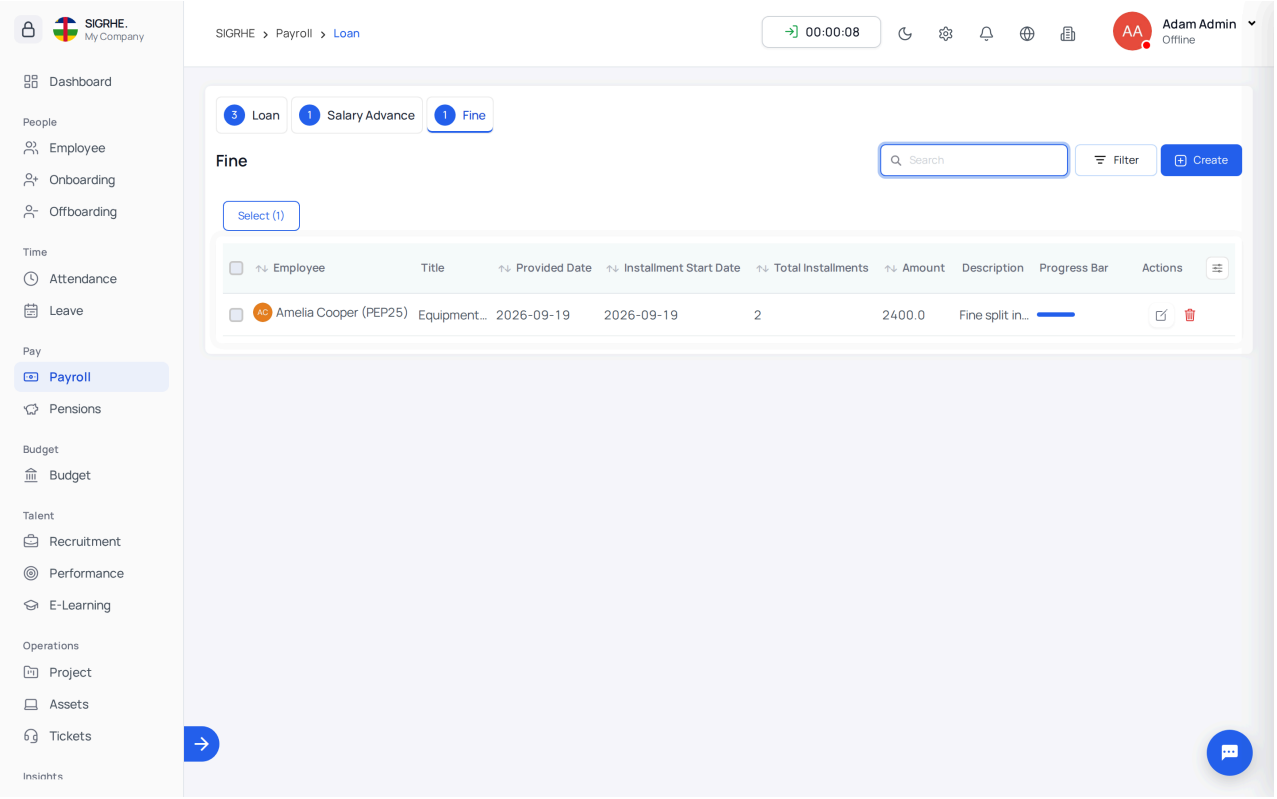
Last updated: 10/24/25, 2:58 PM

Previous page
Encashments

Next page
Allowances

Loans & Salary Advances (and Penalty/Fine Management)

The **Loan**, **Advance Salary**, and **Penalty/Fine** sections within the Payroll module of the HRMS enable HR professionals to manage employee-related financial transactions effectively. Users can create, view, edit, and delete records related to loans, advance salaries, and penalties/fines, ensuring all related details are accessible and organized



Accessing the Loan Section

1. **Navigate to Payroll**:
   - On the left side menu, click on Payroll.
   - Select **Loan / Advanced Salary** from the dropdown list.
   - The Loan page displays a list of all loan entries in a table format.

Working with the Loan Table

The Loan table provides a detailed view of all defined loans, with columns for:

- **Type**: The type of loan (e.g., Personal Loan, Educational Loan).
- **Title**: The title or description of the loan.
- **Amount**: The total amount of the loan.
- **Employee**: The employee receiving the loan.
- **Installment Amount**: The amount of each installment.
- **Installment Start Date**: The date when the installment payments begin.
- **Total Installments**: The total number of installments for the loan.
- **Settled**: Indicates whether the loan has been fully repaid.
- **Actions**: Buttons to view, edit, or delete the loan entry.

Filtering and Grouping Loans

- **Filter Loans**:
  - Click on the **Filter** button to narrow down loans based on specific criteria such as loan type, employee, or settled status.

Creating a New Loan

- Click on the **+ Create** button at the top-right corner of the Loan page.
- Fill in the loan details:
  - **Type**: Select the type of loan (e.g., Personal Loan, Educational Loan).
  - **Title**: Enter the title or description of the loan.
  - **Amount**: Enter the total loan amount.
  - **Installment Amount**: Set the amount for each installment.
  - **Total Installments**: Specify the total number of installments.
  - **Installment Start Date**: Set the start date for the installments.
  - **Settled**: Toggle on if the loan has been fully repaid.
  - **Description**: Provide a detailed description of the loan.
- Save the loan by clicking the **Save** button.

Editing and Deleting Loans

- **To Edit a Loan**:
  - Click the **Edit** icon next to the loan in the Actions column.
  - Make the necessary changes and save.
- **To Delete a Loan**:
  - Click the **Delete** icon next to the loan in the Actions column.
  - Confirm the deletion.

Advance Salary Management

Advance Salary allows employees to receive a portion of their salary ahead of the scheduled payday. The HRMS system facilitates this process by enabling HR professionals to manage requests for advance salary efficiently.

Accessing the Advance Salary Section

1. **Navigate to Payroll**:
    - On the left side menu, click on Payroll.
    - Select **Loan / Advanced Salary** from the dropdown list.
    - Switch to the **Advanced Salary** tab within the Loan section to view a list of all advance salary requests.

Working with the Advance Salary Table

The Advance Salary table provides a detailed view of all defined requests, with columns for:

- **Employee**: The employee requesting the advance salary.
- **Amount**: The total amount requested.
- **Request Date**: The date the request was made.
- **Installment Amount**: The amount of each installment to repay the advance.
- **Installment Start Date**: The date when repayment installments begin.
- **Total Installments**: The total number of installments for repayment.
- **Status**: Indicates whether the request is approved, pending, or rejected.
- **Actions**: Buttons to view, edit, or delete the advance salary request.

Filtering Advance Salary

- **Filter Advance Salary Requests**:
    - Click on the **Filter** button to narrow down requests based on specific criteria such as employee, status, or amount.

Creating a New Advance Salary

- Click on the **+ Create** button at the top-right corner of the Advance Salary page.
- Fill in the advance salary details:
    - **Employee**: Select the employee requesting the advance salary.
    - **Amount**: Enter the total amount requested.
    - **Installment Amount**: Set the amount for each repayment installment.
    - **Total Installments**: Specify the total number of installments.
    - **Installment Start Date**: Set the start date for the repayment installments.
    - **Description**: Provide a detailed description of the request.
- Save the request by clicking the **Save** button.

Editing and Deleting Advance Salary Requests

- **To Edit an Advance Salary Request**:
  - Click the **Edit** icon next to the request in the Actions column.
  - Make the necessary changes and save.
- **To Delete an Advance Salary Request**:
  - Click the **Delete** icon next to the request in the Actions column.
  - Confirm the deletion.

Penalty/Fine Management

The Penalty/Fine management section allows HR professionals to impose penalties or fines on employees for various reasons. The HRMS system facilitates the recording and management of these penalties/fines.

Accessing the Penalty/Fine Section

- **Navigate to Payroll**:
  - On the left side menu, click on Payroll.
  - Select **Loan / Advanced Salary** from the dropdown list.
  - Choose **Penalty / Fine** from the Type dropdown when creating or managing entries.

Working with the Penalty/Fine Table

The Penalty/Fine table provides a detailed view of all defined penalties/fines, with columns for:

- **Employee**: The employee being penalized or fined.
- **Amount**: The total amount of the fine.
- **Reason**: The reason for the penalty/fine.
- **Date Imposed**: The date when the fine was imposed.
- **Status**: Indicates whether the fine has been paid or is still outstanding.
- **Actions**: Buttons to view, edit, or delete the penalty/fine entry.

Filtering and Grouping Penalties/Fines

- **Filter Penalties/Fines**:
  - Click on the **Filter** button to narrow down penalties or fines based on specific criteria such as employee, status, or reason.
- **Group By**:
  - Use the **Group By** feature to organize penalties/fines by categories like status or amount.

Creating a New Penalty/Fine Entry

- Click on the **+ Create** button at the top-right corner of the Penalty/Fine page.

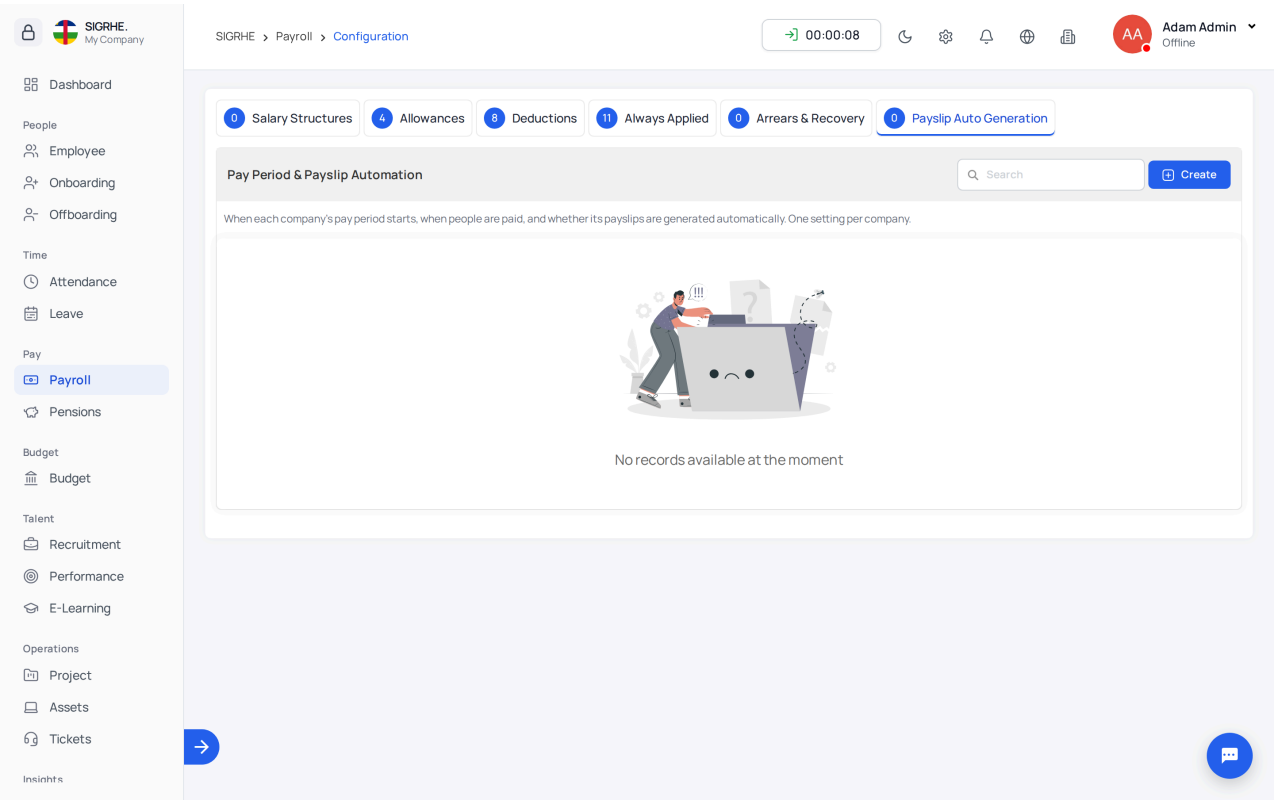
- Fill in the penalty/fine details:
  - **Type:** Select the type of penalty.
  - **Employee**: Select the employee being fined.
  - **Amount**: Enter the total amount of the fine.
  - **Reason**: Provide a reason for the penalty/fine.
  - **Provided date**: Set the date the fine was imposed.
  - **Installment start date**: When the startdate .
  - **Total installment:** Add zero if it is a one time fine.
  - **Description**: Provide a detailed description of the penalty/fine.
- Save the penalty/fine by clicking the **Save** button.

Editing and Deleting Penalties/Fines

- **To Edit a Penalty/Fine**:
  - Click the **Edit** icon next to the penalty/fine in the Actions column.
  - Make the necessary changes and save.
- **To Delete a Penalty/Fine**:
  - Click the **Delete** icon next to the penalty/fine in the Actions column.
  - Confirm the deletion.

Last updated: 10/24/25, 2:58 PM

Payroll



NKL-HR HRMS Software offers a comprehensive and efficient **payroll module** within its suite of features. The payroll software module in NKL-HR enables businesses to effectively manage employee allowances, deductions, taxes, and the generation of accurate payslips. With NKL-HR's payroll software, you can streamline your payroll processes and ensure timely and accurate salary calculations for your employees.

Dashboard Overview

The **Payroll Dashboard** within the HRMS provides HR professionals with a comprehensive overview of payroll activities. The dashboard displays key metrics related to payslip processing, enabling users to monitor and manage payroll status effectively.

Accessing the Payroll Dashboard

- **Navigate to Payroll:**

- On the left side menu, click on **Payroll**.
- Select **Dashboard** from the dropdown list.
- The Payroll Dashboard displays a summary of payroll activities in a graphical and tabular format.

Key Components of the Payroll Dashboard

1. Payroll Status Overview

- **Paid:** Displays the number of payslips marked as paid for the selected month and year.
- **Confirmed:** Shows the number of confirmed payslips.
- **Review Ongoing:** Indicates the number of payslips currently under review.
- **Draft:** Displays the number of payslips saved as drafts.
- **Month and Year Selection:**
  - Use the dropdown menu to select a specific month and year to filter the payroll data displayed on the dashboard.

2. Employee Payslips Graph

- **Graph Display:**
  - A bar graph representing the status of employee payslips (Draft, Review Ongoing, Confirmed, Paid) is displayed.
  - The Y-axis represents the amount, and the X-axis employee.
  - Color coding helps distinguish between different statuses:
    - **Red:** Draft
    - **Yellow:** Review Ongoing
    - **Blue:** Confirmed
    - **Green:** Paid

3. Payslip Summary

- **Total Payslips Generated:**
  - Indicates the total number of payslips generated for the selected period.
- **Total Amount:**
  - Displays the total amount processed in payslips.
- **Department Total Amount:**
  - Breaks down the total amount by department, listing individual department totals.

4. Export Option

- **Export Button:**

- The **Export** button allows users to download the payroll data in various formats (e.g., CSV, PDF).
- Located at the top right of the Payroll Status Overview section.

5. Employer Contributions

- **Employee Selection:**
  - A dropdown menu to select an employee to view their specific employer contributions.
- **Contribution Summary:**
  - Displays a breakdown of contributions made by the employer for the selected employee.

Filtering and Exporting Data

- **Filtering:**
  - Use the filtering options to narrow down payroll data by specific criteria such as month, year, or employee.
- **Exporting Data:**
  - Click on the **Export** button to save payroll data in your preferred format. This allows for easy reporting and record-keeping.

Last updated: 10/24/25, 3:19 PM

Next page
Introduction

Payslip Management

The Payslip section within the Payroll module of the HRMS allows HR professionals to manage and generate employee payslips efficiently. This section provides features to create, view, edit, delete, and export payslips, ensuring that all payroll-related details are organized and accessible.

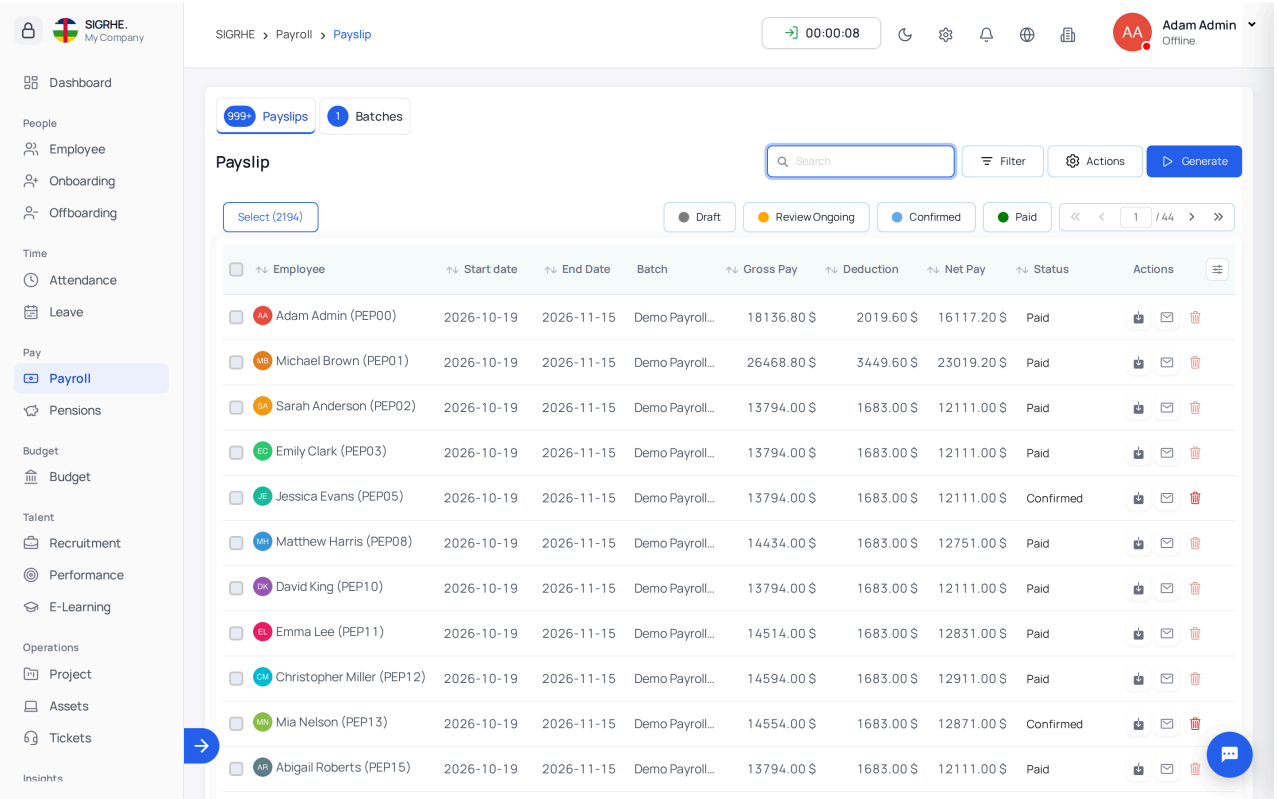
Accessing the Payslip Section

Navigate to Payroll:

1. On the left side menu, click on **Payroll**.
2. Select **Payslips** from the dropdown list.

The Payslips page displays a list of all payslips in a table format.

Working with the Payslips Table



The Payslips table provides a detailed view of all generated payslips, with columns for:

- **Employee**: The name of the employee.

- **Start Date**: The starting date of the pay period.
- **End Date**: The ending date of the pay period.
- **Batch**: The payroll batch the payslip belongs to.
- **Gross Pay**: The total gross pay for the period.
- **Deductions**: The total deductions applied.
- **Net pay:** The net amount.
- **Status:** Status types are drafts,review ongoing,Confirmed,Paid.
- **Actions**: Buttons to download the payslip, send payslip as mail, delete.

Creating a New Payslip

```
**Permission:**
```

—----------blank—---------

- Click on the **+ Create** button at the top-right corner of the Payslips page.
- Fill in the payslip details:
  - **Employee**: Select the employee for whom the payslip is being generated.
  - **Start Date**: Set the start date of the pay period.
  - **End Date**: Set the end date of the pay period.
- Save the payslip by clicking the **Save** button.

Deleting Payslips

Permission:

—----------blank—---------

To Delete a Payslip:

- Click the **Delete** icon next to the payslip in the Actions column.
- Confirm the deletion.

Accessing the Payslip Actions Menu

1. **Navigate to Payroll:**
   - On the left side menu, click on **Payroll**.
   - Select **Payslips** from the dropdown list.
2. **Opening the Actions Menu:**
   - On the Payslips page, click the **Actions** button at the top-right of the table to open a dropdown menu.

Actions Menu Options

The Actions menu provides several bulk operation features:

- **Generate bulk payslip:**

  - **Batch Name:** Enter a unique batch name to identify this group of payslips.
  - **Employee:** Select the employees from the dropdown list or use the filter to narrow down the list.
  - **Start Date & End Date:** Set the duration for which the payslips are being generated.
  - After filling out all the required details, click on **Generate Payslips**. The system will create payslips for all selected employees based on the specified dates and other inputs.

- **Generate Payroll Report:**
  - Use this option to generate a detailed payroll report that includes comprehensive earnings, deductions, and contributions for selected employees. This report provides a more in-depth analysis compared to the standard payslip export.

- **Send Payslips via Email:**
  - Choose this option to send selected payslips directly to the employees' registered email addresses.

- **Bulk Status Update:**
  - This feature allows you to update the status of multiple payslips at once. After selecting the payslips, choose the desired status from the dropdown list under the **Bulk Status Update** section.

- **Export Payslips:**
  - To export selected payslips, click on the **Export** option. This allows you to download the payslips in formats such as CSV or PDF. The export functionality includes filtering options, so you can choose specific payslips to export.

- **Delete Payslips:**
  - The **Delete** option allows you to remove selected payslips from the system. This action is irreversible, so be sure before confirming the deletion.

Payslip Report vs. Payslip Export

- **Payslip Report:**
  - Contains detailed payroll information including:
    - Employee's full name, ID, and department
    - Comprehensive earnings (basic salary, allowances)
    - Full list of deductions (taxes, insurance)
    - Employer contributions
    - Net pay details

    - Pay period details
- **Payslip Export:**
    - Contains minimal payroll data including:
        - Employee's name and ID
        - Summary of gross pay, deductions, and net pay

Exporting and Sending Payslips

To Download a Payslip:

1. Click the **Download** icon next to the payslip in the Actions column to download the payslip as a PDF.

To Send a Payslip via Email:

1. Click the **Send Mail** icon next to the payslip in the Actions column to send the payslip directly to the employee's email.

Filtering and Grouping Payslips

Filter Payslips:

1. Click on the **Filter** button to narrow down payslips based on specific criteria like status, batch, or employee.

Group By:

1. Use the **Group By** feature to organize payslips by categories like status, pay period, or employee.

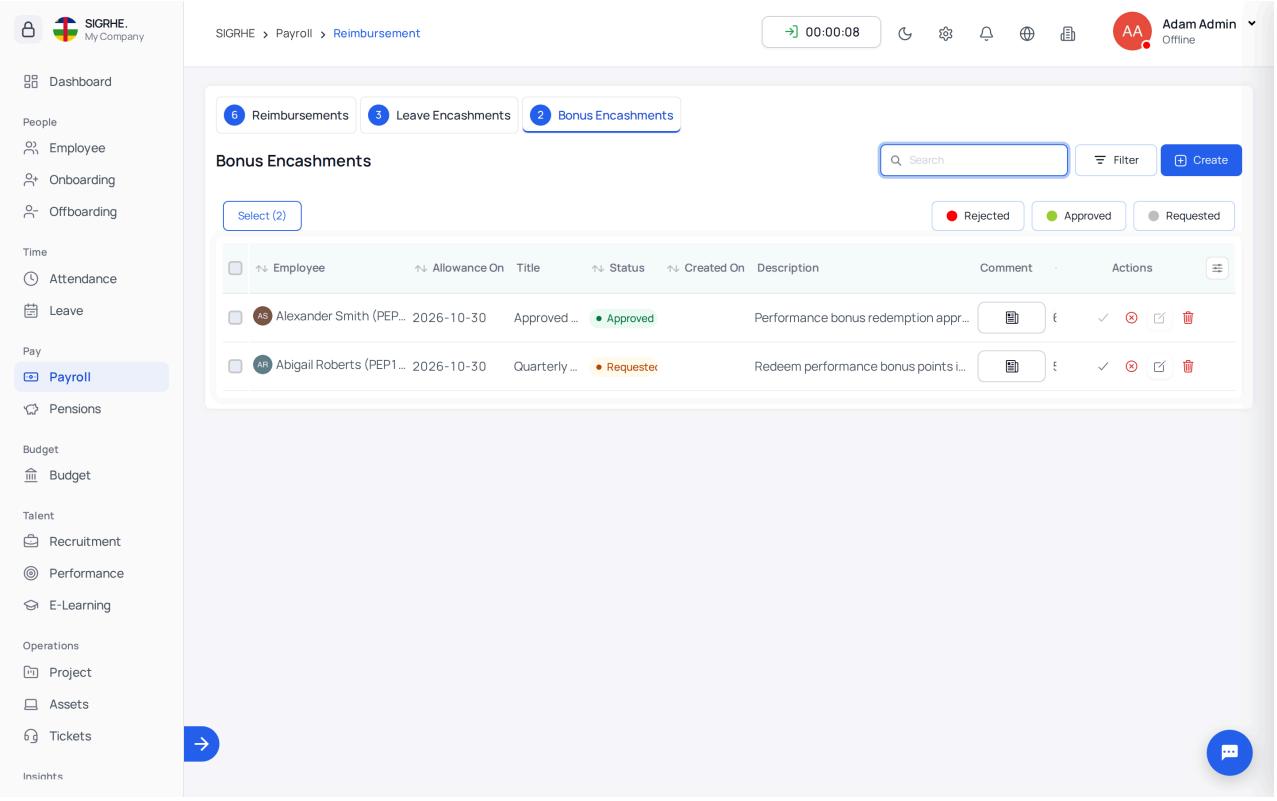
Last updated: 10/24/25, 2:58 PM

Previous page
Contracts

Next page
Loans & Salary Advances

Reimbursement

The Reimbursement, Bonus Point, and Leave Encashment sections within the Payroll module of the HRMS enable HR professionals to manage employee-related financial transactions efficiently. Users can create, view, edit, and delete records related to reimbursements, bonus points, and leave encashments, ensuring all related details are accessible and organized.



Accessing the Reimbursement Section

1. **Navigate to Payroll:**
   - On the left side menu, click on **Payroll**.
   - Select **Encashments & Reimbursements** from the dropdown list.
   - Switch to the **Reimbursements** tab.

Working with the Reimbursement Table

The Reimbursement table provides a detailed view of all defined reimbursements, with columns for:

- **Title:** The title or description of the reimbursement.
- **Employee:** The employee receiving the reimbursement.
- **Amount:** The total amount of the reimbursement.
- **Request Date:** The date when the reimbursement was requested.
- **Status:** Indicates whether the reimbursement is approved, pending, or rejected.
- **Actions:** Buttons to view, edit, or delete the reimbursement entry.

Filtering and Grouping Reimbursements

- **Filter Reimbursements:**
  - Click on the **Filter** button to narrow down reimbursements based on specific criteria such as status, employee, or date.

Creating a New Reimbursement

- **Click on the + Create Button:**
  - Located at the top-right corner of the Reimbursement page.
- **Fill in the Reimbursement Details:**
  - **Title:** Enter the title or description of the reimbursement.
  - **Type:** Choose reimbursement.
  - **Employee:** Select the employee receiving the reimbursement.
  - **Allowance on:** In which monthly payslip should reflect this amount.
  - **Amount:** Enter the total reimbursement amount.
  - **Description:** Provide a detailed description of the reimbursement.
  - **Attachments:** Upload any relevant documents.
- **Save the Reimbursement:**
  - Click the **Save** button to finalize the reimbursement entry.

Editing and Deleting Reimbursements

- **To Edit a Reimbursement:**
  - Click the **Edit** icon next to the reimbursement in the **Actions** column.
  - Make the necessary changes and save.
- **To Delete a Reimbursement:**
  - Click the **Delete** icon next to the reimbursement in the **Actions** column.
  - Confirm the deletion.

Confirmation

- **To Approve a Reimbursement:**
  - Click on the Approve button next to the reimbursement in the **Confirmation** column
- **To Reject a Reimbursement:**

- Click the **Reject** button next to the reimbursement in the **Confirmation** column.

Last updated: 10/24/25, 2:58 PM

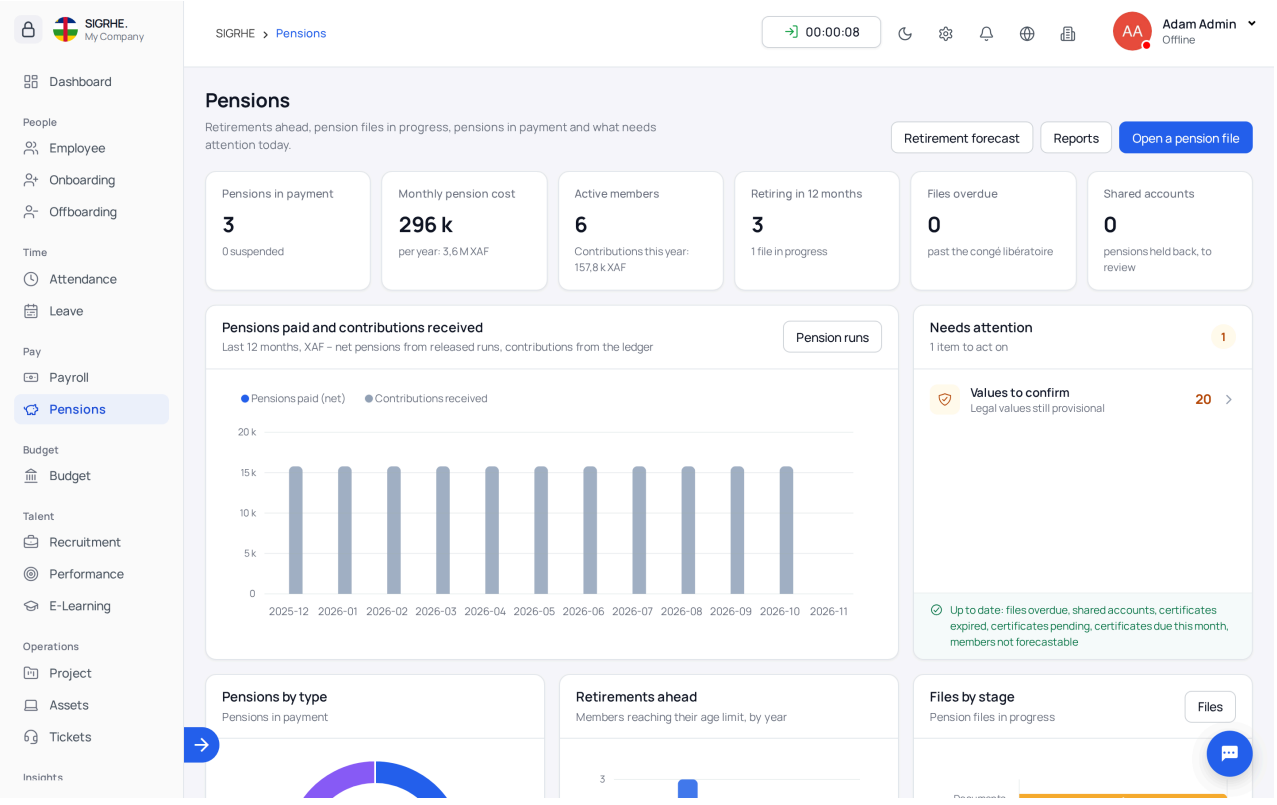
Previous page
Loans & Salary Advances

Next page
Encashments

Pension Management

The Pension Management module in NKL-HR provides end-to-end administration of pension contributions, statutory fund declarations, retirement forecasting, pension claim processing, pensioner registers, life certificate verifications, and monthly pension disbursements.

1. Module Overview & Statutory Architecture



The Pension module is delivered with configurable multi-fund architecture (including starting packs for statutory funds like **CNSS** and **CCPCM**).

- **Fully Parameterized:** Statutory deduction rates, age limits, service thresholds, annuity rates, survivor benefit shares, checklists, and file layouts are managed as dated configuration data.
- **Dated Validity:** Every statutory rate or parameter row features a validity period (`Valid From` / `Valid To`), preserving historical fidelity across legislative reforms.

2. Configuration of Funds & Rules

Navigation: `Pensions → Configuration`

COMPONENT	FUNCTIONALITY
Funds	Configure managing entities (code, name, fund type, currency, declaration frequency, retirement alert offsets).
Fund Branches	Old-age pension, family allowances, work-accident coverage; linked to specific payroll deduction types.
Regimes	Maps employee types to funds (e.g., civil servants to CCPCM, contract personnel to CNSS).
Categories	Classification tiers (e.g., A1 through D2, higher education faculty).
Parameters	Dated formula parameters with legal references (`AGE_LIMIT`, `MIN_SERVICE_YEARS`, `ANNUITY_RATE`, `MAX_RATE`, `SPOUSE_SHARE`, `ORPHAN_AGE`, `LIFE_CERT_GRACE_DAYS`).
Claim Types	Retirement, early retirement, disability, survivor pension, lump-sum refund.
Document Checklists	Mandatory and conditional document requirements per claim type.
Approval Stages	Sequential multi-tier approval chains with role segregation (e.g., liquidator, financial controller, director).
Benefit Rules	Dated benefit calculation formulas per claim type, including reference salary criteria, minimums, and caps.
File Formats	Dynamic layouts for statutory fund declarations and bank payment files (CSV, XML, Fixed-Width, Excel).
Document Templates	Print templates for retirement decrees, liquidation statements, and official pension books.

---

3. Contribution Rates & Salary Bases

Navigation: `Pensions → Configuration → Parameters / Contribution Rates`

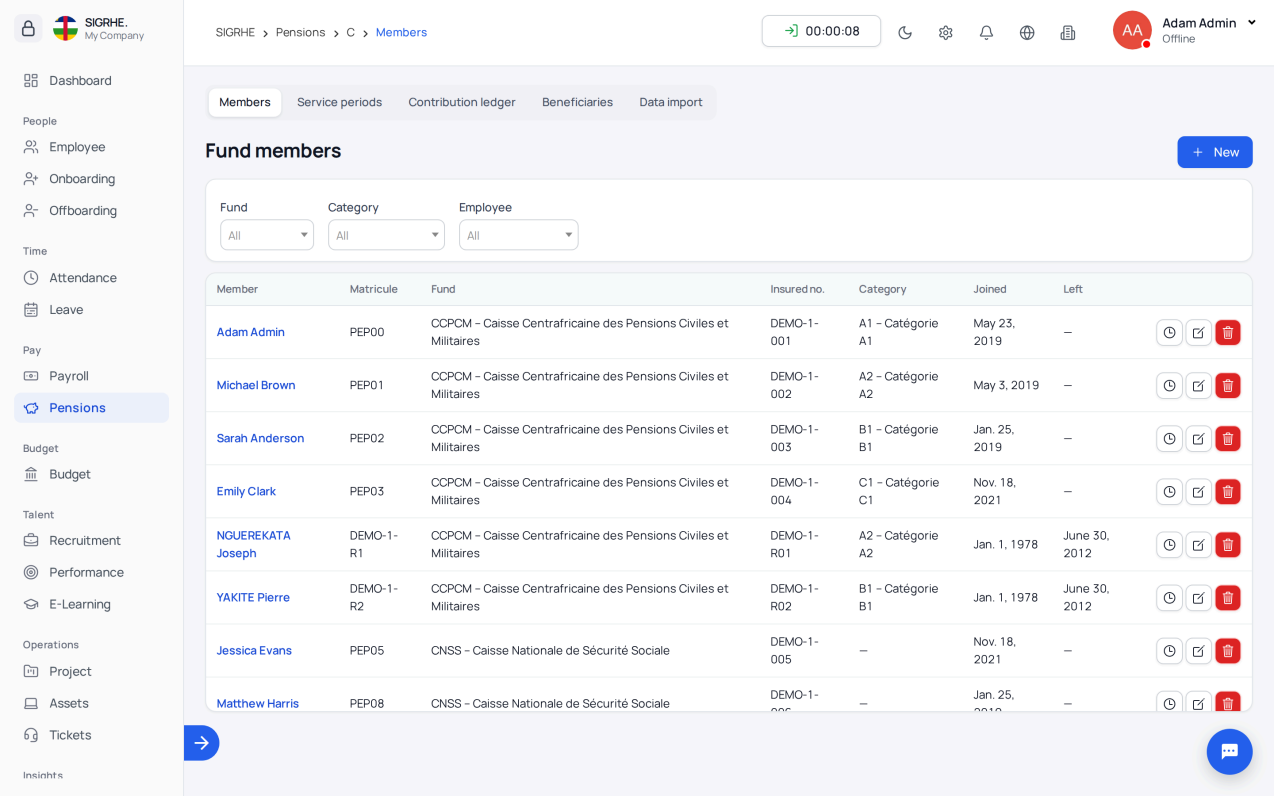
Percentage deduction lines support dated rate rows:

- **Valid From Date:** Activation date for statutory rate changes.
- **Employee & Employer Rates:** Calculated on the designated salary base.

- **Floors & Ceilings:** Enforces minimum contributions and maximum salary caps (e.g., CNSS 600,000 XAF ceiling).
- **Legal Reference & Status:** References statutory legislation, flagged as **Confirmed** or **To Confirm**.

---

4. Fund Memberships & Service Records

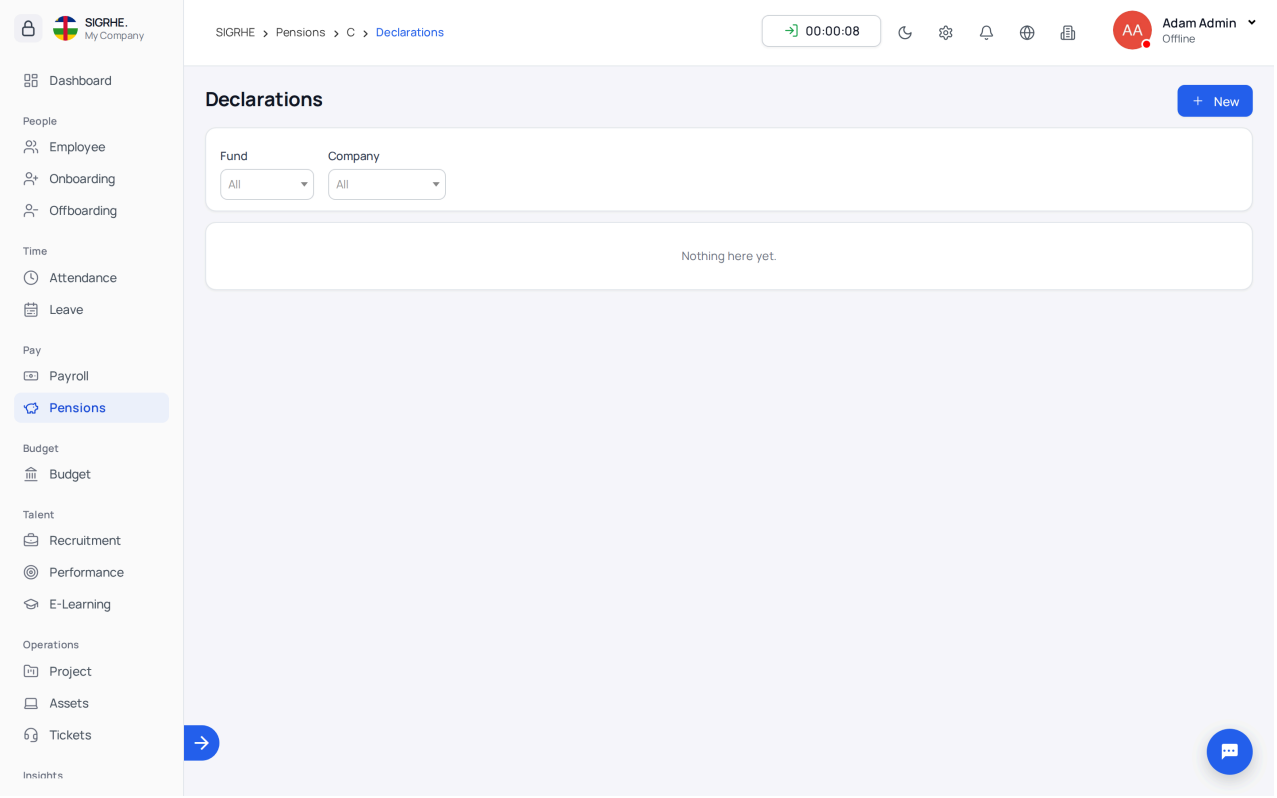


Every eligible employee is registered under a **Fund Membership**:

- **Membership Information:** Fund, regime, national insured number, category, registration date, and beneficiaries.
- **Contribution Posting:** Member contributions post automatically when monthly payroll runs are confirmed or paid. Reversals or adjustments in payroll synchronize with the contribution ledger.
- **Service Records:** Tracks active contracts, secondments, unpaid leaves, military service, and contract gaps. Time intervals are calculated in years, months, and days (using standard 30/360 day-count conventions).
- **Member Ledger:** Printable annual contribution statement, missing month detection, and verified service summaries.

---

5. Statutory Fund Declarations



Navigation: `Pensions → Declarations`

Periodic statutory reporting for pension fund authorities:

1. **Create Declaration:** Select fund, ministry/company, and reporting period (monthly or quarterly). Data aggregates automatically from issued payslips.
2. **Reconciliation:** Review contribution breakdowns by branch and inspect warnings regarding missing insured numbers or unlinked contributions.
3. **Generate File:** Compiles the export file adhering strictly to the fund's configured layout specification (**Generated** status).
4. **Filing Confirmation:** Record the official submission receipt reference upon filing with the fund (**Filed** status). Filed declarations lock permanently against modification.

---

6. Retirement Forecasting

Navigation: `Pensions → Retirement Forecast`

Calculates projected retirement dates based on employee date of birth and statutory age limits for their category:

- **Horizon Filtering:** Filter retirement forecasts by horizon windows (12, 24, 36, or 60 months).
- **Automated Notifications:** Dispatches automated in-app notifications to HR and employees at configured offsets (e.g., 12, 6, and 3 months prior to retirement).
- **One-Click Initiation:** Direct link to launch a formal retirement pension file directly from forecast rows.

---

7. Pension File Processing & Claim Lifecycle

Navigation: `Pensions → Pension Files`

Manages formal claim applications across sequential workflow gates:

1. **File Initiation:** Generate a sequential file number (e.g., `PEN-2026-00001`) based on claim type (Retirement, Early Retirement, Disability, Survivor, Lump Sum).
2. **Documents Tab:** Upload and verify checklist documents. All required items must be marked **Received** to unlock subsequent stages.
3. **Service Record Tab:** Review verified service periods and document any contractual gaps.
4. **Calculation Tab:** Execute formula liquidation. The system applies the statutory rule in effect on the event date. Each calculation run creates an immutable version snapshot with inputs, parameters, and resulting figures.
5. **System Validations:** Automated verification of eligibility, contribution months, service duration, minimum floors, and maximum caps.
6. **Approvals Tab:** Routes through configured approval tiers. Role segregation enforces that the calculation preparer cannot approve the calculation.
7. **Award & Liquidation:** Upon final sign-off, the file closes as **Awarded**, creating the pensioner record and generating the **Liquidation Statement (RPT-PEN02)**, official **Retirement Decree**, and **Pension Book**.

---

8. Survivor Claims & Beneficiary Allocations

- **Beneficiary Registration:** Record qualifying beneficiaries (spouses, dependent children, disabled dependents) with civil status certificates.
- **Survivor Liquidation:** Event date is set to the date of death. If the deceased was an active pensioner, survivor calculations derive from their active pension base.
- **Share Allocations:**
  - Multiple spouses share the statutory spouse allocation equally.
  - Dependent orphans receive individual shares up to statutory age limits (disabled children are exempt from age ceilings).
  - System scales shares proportionally if total claims exceed 100%.
  - On award, distinct pensioner accounts are created for each beneficiary, and the deceased member's pension terminates.

---

9. Pensioner Registry & Life Certificates

Navigation: `Pensions → Pensioners`

The registry tracks all active pensioners, pension types, awarded amounts, arrears, payment modes (Bank Transfer, Mobile Money, Cash), and active statuses (**Active**, **Suspended**, **Terminated**).

Life Certificate Campaigns

Navigation: `Pensions → Life Certificates`

- Launch periodic proof-of-life campaigns with defined deadline dates.
- Record received certificates via biometric confirmation, mobile verification, or physical documentation.
- Following the grace period, pensioners lacking verified certificates are **automatically suspended** from monthly payment runs. Verification immediately reinstates the pension.

Shared Bank Account Detection

Navigation: `Pensions → Pensioners → Shared Accounts`

- Automated fraud-prevention audit flagging multiple pensioners sharing identical bank account numbers or mobile wallets.
- Conflicting accounts are excluded from monthly payment runs until an administrative exception is formally investigated and approved.

---

10. Monthly Pension Payment Runs & Revaluations

Statutory Revaluations

Administer statutory pension adjustments by recording decree percentages and effective dates. Backdated revaluations calculate and accrue payment **arrears** automatically.

Monthly Pension Run

Navigation: `Pensions → Pension Run`

1. Initiate a payment run for the fund, ministry, and target month.
2. The engine computes payments for active, verified pensioners, proration for partial months, accrued arrears, and statutory deductions.
3. Review audit journals and resolve excluded or conflicting records.
4. Click **Release** to freeze calculations, settle arrears, and output banking disbursement files.
5. Generate individual **Pension Slips (RPT-PEN06)** with verification QR codes.

---

11. Data Migration & Historical Import

Navigation: `Pensions → Data Migration`

Stepwise historical data onboarding:

1. Execute imports in strict sequence:
   - `1. Members`
   - `2. Service Periods`
   - `3. Contribution History`
   - `4. Beneficiaries`
   - `5. Active Pensions in Payment`
2. **Validation First:** Performs a comprehensive trial validation run, reporting row-level format or data errors without committing database changes.
3. Commit imports once validation checks pass cleanly.

---

12. Security & Audit Logging

- **Email 2FA One-Time Codes:** High-privilege pension roles (Liquidator, Financial Controller, Director of Pensions, Pension Payroll Officer) require a 6-digit one-time code emailed upon session initiation.
- **Tamper-Resistant Audit Trail (RPT-PEN09):** Every modification to parameters, benefit rules, calculations, approvals, and pension records is logged with immutable timestamps, user IDs, and changed values.

---

13. Reports Reference

Navigation: `Pensions → Reports`

All reports can be exported to **PDF**, **Excel**, and **CSV**:

CODE	REPORT TITLE	DESCRIPTION
RPT-PEN01	Retirement Forecast	Projected retirements by horizon and category.
RPT-PEN02	Liquidation Statement	Detailed breakdown of calculated pension entitlements.
RPT-PEN03	Pension Payroll Journal	Monthly reconciliation of net disbursements.
RPT-PEN04	Contribution Statement	Historical service and contribution ledger per member.
RPT-PEN05	Life Certificate Status	Compliance tracking across active campaigns.

CODE	REPORT TITLE	DESCRIPTION
RPT-PEN06	Pension Slip	Individual monthly payment slip with security QR code.
RPT-PEN07	Survivor Pension Register	Summary of active survivor and orphan pensions.
RPT-PEN08	Cost Projection	Multi-year budgetary expenditure forecasts.
RPT-PEN09	Audit Trail	Complete historical audit log of system modifications.

Previous page
E-Learning

Next page
Settings

Performance Managment System

A Performance Management System (PMS) within NKL-HR software is a comprehensive tool designed to streamline and optimize the process of managing employee performance. By centralizing Objectives, performance evaluation, feedback, and development planning. NKL-HR helps HR teams to efficiently track progress, provide timely feedback, and foster a culture of continuous improvement.

Dashboard

The Dashboard provides an overview of performance metrics, including Objectives, Feedback, and Key Results. It displays data through graphs and summary counts.

Page not found (404)

Request Method: GET
Request URL: http://nkl-hr.nanokernel.com/pms/pms-dashboard/

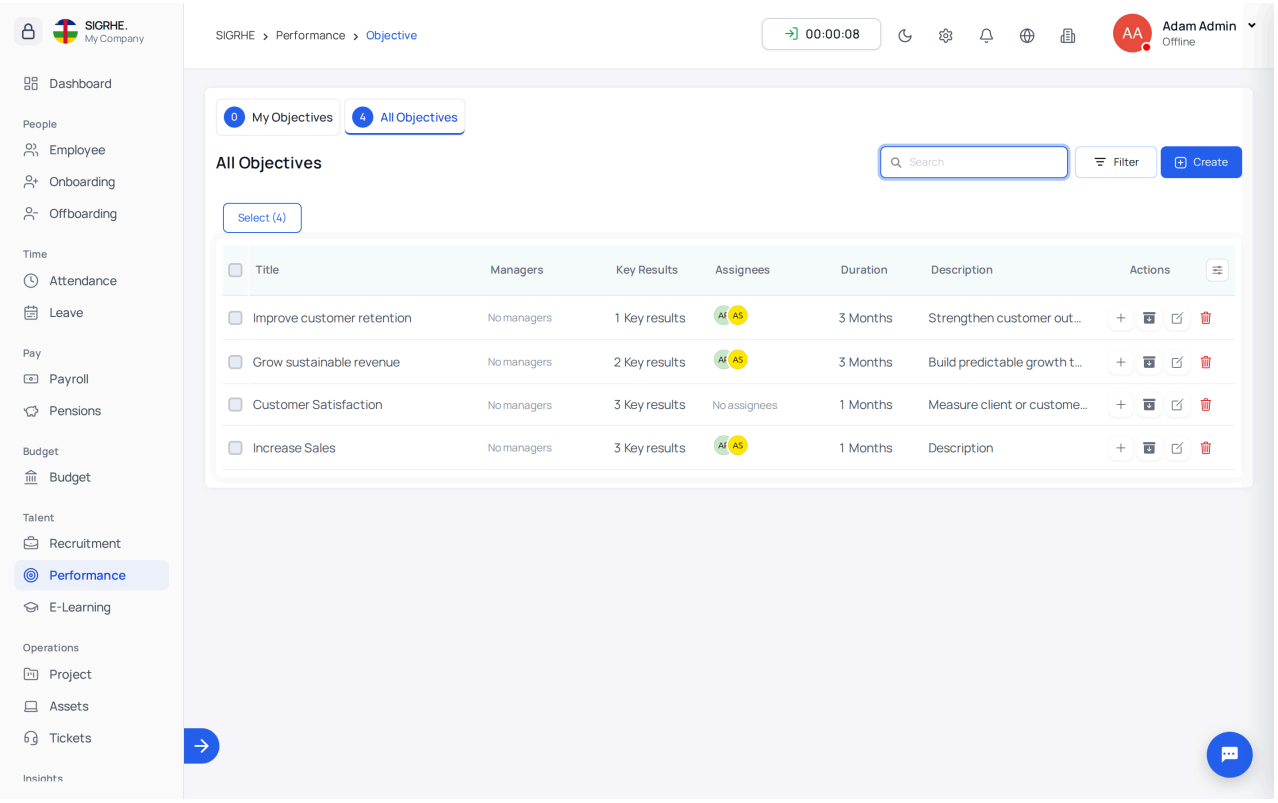
Using the URLconf defined in `horilla.urls`, Django tried these URL patterns, in this order:

1. admin/
2. accounts/login/ [name='accounts-login-redirect']
3. accounts/
4. breadcrumbs-fragment/ [name='breadcrumbs-fragment']
5. [name='home-page']
6. dashboard/ [name='dashboard']
7. dashboard/api/ticket-priority/ [name='dashboard-ticket-priority']
8. dashboard/api/overdue-tickets/ [name='dashboard-overdue-tickets']
9. dashboard/api/kpi/ [name='dashboard-kpi-data']
10. dashboard/api/leave-breakdown/ [name='dashboard-leave-breakdown']
11. dashboard/api/departments/ [name='dashboard-department-headcount']
12. dashboard/api/gender/ [name='dashboard-gender-split']
13. dashboard/api/announcements/ [name='dashboard-announcements']
14. dashboard/api/birthdays-anniversaries/ [name='dashboard-birthdays-anniversaries']
15. dashboard/api/pending-approvals/ [name='dashboard-pending-approvals']
16. dashboard/api/turnover/ [name='dashboard-turnover']
17. dashboard/api/attendance-overview/ [name='dashboard-attendance-overview']
18. dashboard/api/leave-trends/ [name='dashboard-leave-trends']
19. dashboard/api/hiring-timeline/ [name='dashboard-hiring-timeline']
20. dashboard/api/recruitment-by-stage/ [name='dashboard-recruitment-by-stage']
21. dashboard/save-prefs/ [name='dashboard-save-prefs']
22. dashboard/dismiss-setup-checklist/ [name='dashboard-dismiss-setup-checklist']
23. my-dashboard/ [name='ess-dashboard']
24. ess/
25. my-dashboard/api/kpi/ [name='ess-kpi-data']
26. my-dashboard/api/leave-balance/ [name='ess-leave-balance']
27. my-dashboard/api/leave-requests/ [name='ess-leave-requests']
28. my-dashboard/api/monthly-summary/ [name='ess-monthly-summary']
29. my-dashboard/api/attendance-calendar/ [name='ess-attendance-calendar']
30. my-dashboard/api/work-hours-month/ [name='ess-work-hours-month']
31. my-dashboard/api/payslips/ [name='ess-payslips']
32. my-dashboard/api/objectives/ [name='ess-objectives']
33. my-dashboard/api/announcements/ [name='ess-announcements']
34. my-dashboard/api/upcoming/ [name='ess-upcoming']
35. my-dashboard/api/birthdays/ [name='ess-birthdays']
36. my-dashboard/api/interviews/ [name='ess-interviews']
37. employee/work-type-request-view/ [name='work-type-request-view']
38. work-list-view/ [name='work-list-view']
39. work-nav-view/ [name='work-nav-view']
40. work-export-candidate/ [name='work-export-candidate']
41. work-detail-view/<int:pk>/ [name='work-detail-view']
42. employee/rotating-work-type-assign/ [name='rotating-work-type-assign']
43. rotating-list-view/ [name='rotating-list-view']
44. rotating-navbar-view/ [name='rotating-navbar-view']
45. work-rotating-detail-view/<int:pk>/ [name='work-rotating-detail-view']
46. rotating-action-export/ [name='rotating-action-export']
47. employee-worktype-tab-list/<int:pk>/ [name='employee-worktype-tab-list']
48. employee-worktype-tab-shell/<int:pk>/ [name='employee-worktype-tab-shell']
49. employee-worktype-tab-nav/<int:pk>/ [name='employee-worktype-tab-nav']
50. employee-rotating-work-tab-list/<int:pk>/ [name='employee-rotating-work-tab-list']

- **Objectives At risk:** Displays objectives that need attention (objectives status at risk), with normal employees seeing their own data, while managers can view all objectives at risk.

Objectives

The objectives of a **Performance Management System (PMS)** encompass several key goals aimed at enhancing employee performance and aligning it with organizational objectives.



- From the Performance submenu, you can access objectives, *(1 from image.1)*. This provides an overall view of the objectives, allowing for easier monitoring and management.
- In NKL-HR, objectives are categorized into two main groups: self objectives and all objectives.
- Self Objectives: For regular employees, the self objectives tab displays the objectives assigned to them, allowing them to focus on their individual goals and progress.
- All objectives: This tab is designed for HR or managerial personnel, providing them with a comprehensive overview of all objectives across the organization. This tab enables HR and managers to monitor and manage objectives at a broader level, facilitating strategic decision-making and alignment with organizational goals.
- **Generate Objectives button**

Image.3

- This "Generate Objectives" button *(2 from image.2)* is accessible only for Hr peoples.To create Objectives that is useful for the organization as well as for individuals.

This form contains the following:

- Title: Name of the objective.
- Managers: Responsible employees for managing the objective.
- Duration unit: Measuring unit for the objective's duration

  `Options include`

- Days
  - Months

    - Years
- Duration: Duration count.
- Key results: Default key results for the objective.
- Description: Description About the objective
- Add assignees: Enable this for adding employees as assignees.
- Assignees: Employees responsible for achieving the objective.
- Start date: Start date for the employees to achieve their objective.
- Archive: Option to archive the objective.

1. **Create button**

Image.4

- This "Create" button *(3 from image.2)* is to assign individual employees to an Objective who needs to achieve them, As well as to create a self objective in case of a normal employee.

  This form contains the following:

- Employee: The Employee who need to achieve this objective
- Objective: The specific objective to be achieved.
- Key results: Key results for this objective.(Default key results related to the objective will automatically assigned)
- Start date: Start date to achieve the objective.
- End date: End date to achieve the objective.
- Status: Status of objective to address the progres.

  options include

    - On Track
    - Behind
    - Closed
    - At risk
    - Not Started
- Archive: Option to archive the record.

Detailed view of Objectives

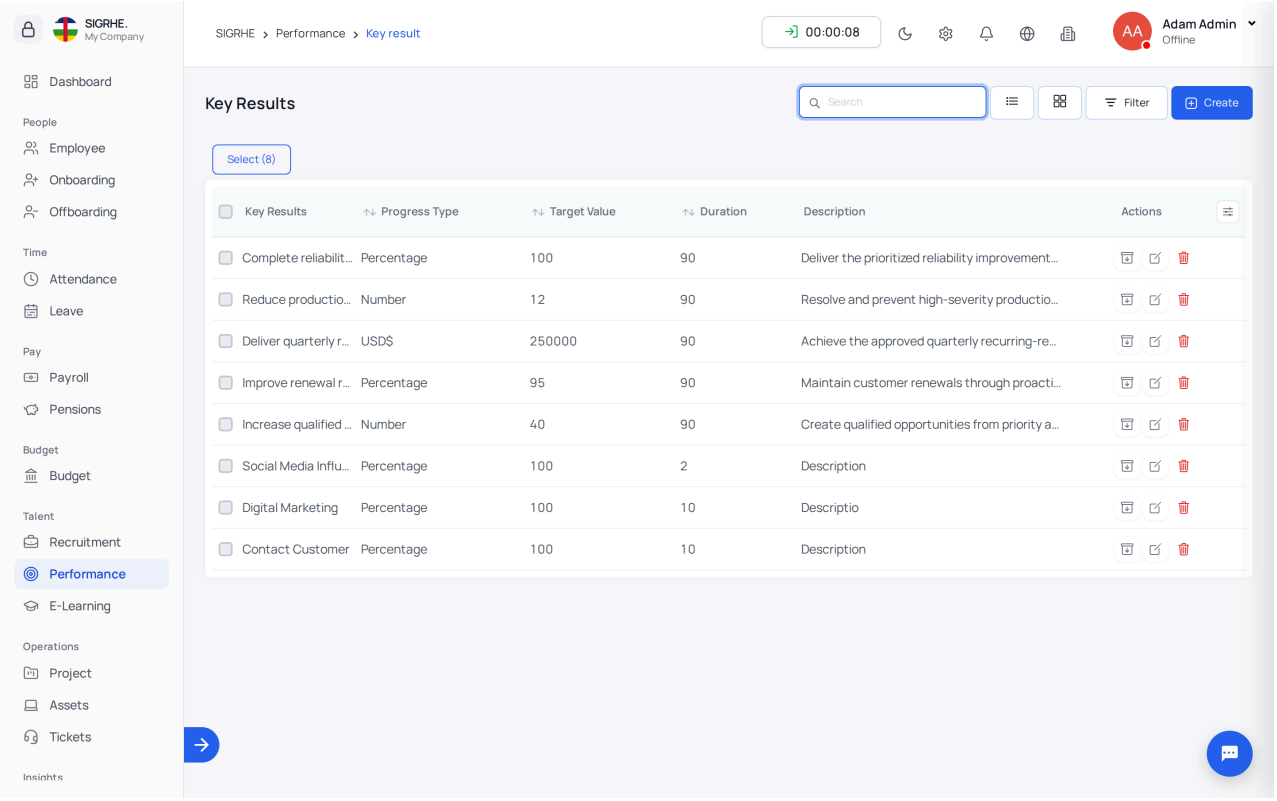
Clicking on an objective will display a view that shows all the assigned employees under that objective, along with the status and progress of each key result for each employee. Additionally, it provides an overview of the overall progress of each employee toward that objective.

Image.5

- **Update Progress**
  Employees can update their progress by inputting the current value *(1 from image.5)*. Then, NKL-HR automatically compares this value with the target value and updates the progress *(2 from image.5)* of both the key result and the overall objective. When the task is completed, employees can achieve a progress percentage of 100%.

- **Add Key result for employee's objective**

  Managers have the capability to add key results for employees, which then become associated with their respective objectives. This allows managers to monitor the progress of key results and overall objectives in a single, consolidated view, ensuring timely tracking and management of employee performance.



- **Activities**

Image.7

By clicking on the activity button *(4 from image.5)*, an activity box will appear, displaying all the changes and their details made to the objective. Additionally, users can provide comments or notes to the assignee within this activity box, facilitating communication and collaboration regarding the objective.

- **Add Assignees to objective**

Image.8

Managers have the capability to add employees as assignees, and can provide a start date.Then those employees records can be monitored on the objective detailed view.

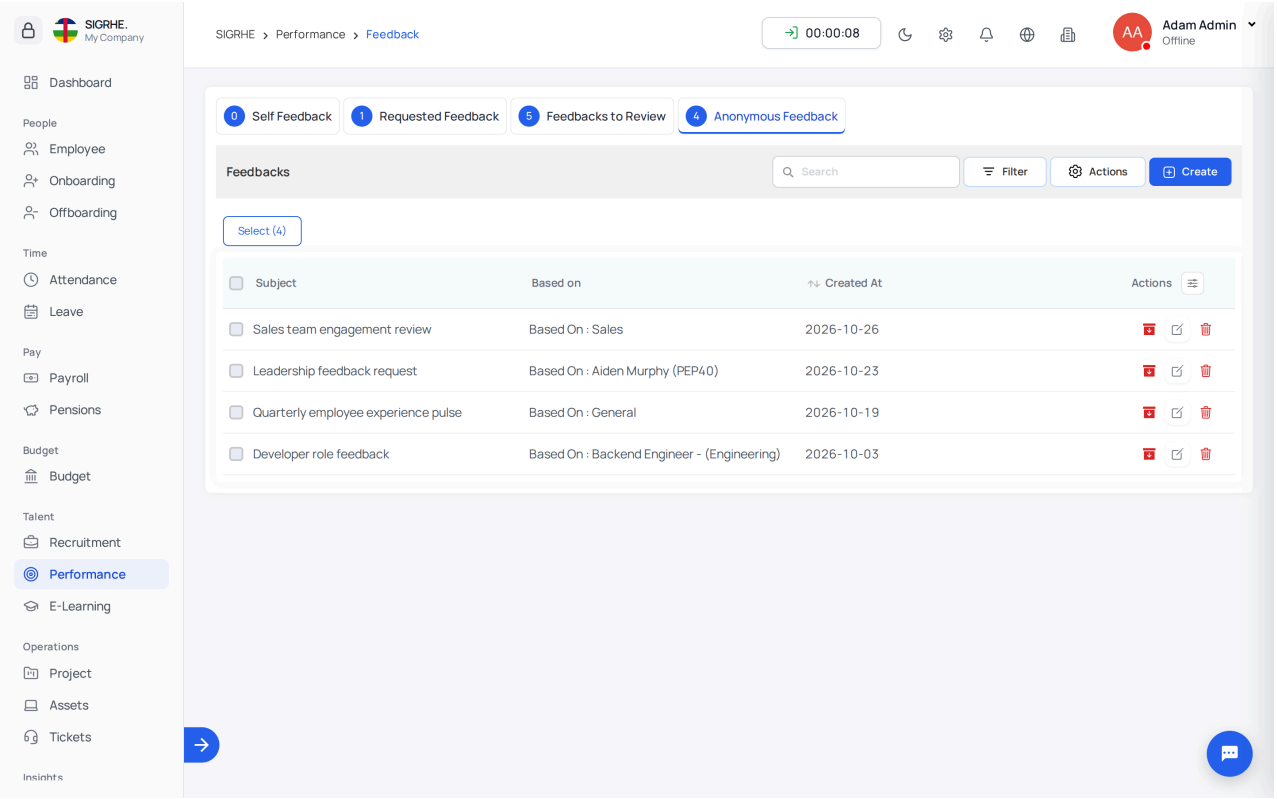
---

360 Feedback

360-degree feedback, is a multi-rater assessment tool that collects feedback from various sources about an employee's performance, including peers, supervisors, subordinates,self and even clients or customers.
It offers a comprehensive view of an individual's strengths, weaknesses, and areas for development, providing a well-rounded perspective on their performance. NKL-HR facilitates the administration, collection, and analysis of this feedback, allowing organizations to gain valuable insights into employee performance, foster self-awareness and growth, and make informed decisions about training, development, and performance management.

- ## Feedback view

  The 360 feedback option on the Performance submenu redirects the user to the feedback view, where feedback is categorized and organized into Self Feedback, Requested Feedback, All Feedback, and Anonymous Feedback. The All Feedback tab is exclusively accessible to responsible managers, displaying all feedback except for anonymous submissions. This ensures managers have comprehensive visibility into feedback while respecting the anonymity of contributors.



- **Self-feedback**
  This tab *(2 from image.9)* shows the feedback provided by the individual who is receiving the feedback.

- **Requested feedback**
  This tab *(3 from image.9)* shows feedback that has been requested by the individual from their colleagues, peers, or superiors.

- **All feedback**
  The all feedback tab *(4 from image.9)* shows all of the feedback that has been collected, including self-feedback and requested feedback from others.

- **Anonymous feedback**
  The anonymous feedback tab *(5 from image.9)* shows all the anonymous feedback related to

the employee.

- ### Create Button

  By clicking the create button *(6 from image.9)*, users access a form to generate feedback. Here, they can specify subordinates, supervisors, colleagues, and all necessary details. Once the feedback is created, NKL-HR automatically displays it on the requested feedback tab of the mentioned employees and notifies them accordingly. This streamlined process facilitates easy and seamless feedback collection from all relevant parties.

Image.10

This form contains the following:

- Title: Name for the feedback.
- Employee: The Employee requesting for feedback.
- Manager: Employee's manager
- Subordinates: Subordinates of the employee.
- Colleagues: Colleagues of the employee.
- Period: Period for the feedback request.
- Start date: Start date for feedback.
- End date: End date for feedback.
- Question Template: Set of questions for feedback.
- Key result: Key results to validate and provide feedback on.
- Is Cyclic Feedback: Enable for repeating this feedback,By enabling this will show the fields for cyclic period.
- Cyclic Period: Frequency for repeating feedback. Can mention the count and the unit Options include
  - Days
  - Months
  - Years

- ### Feedback Answer

Feedback can be provided by completing the questions created by the employee.

Image.11

Once feedback is submitted, NKL-HR notifies the creator and provides access to view the responses. This enables the creator to evaluate themselves based on the feedback received.

Image.12

- ### Anonymous feedback

  Anonymous feedback serves several important purposes in organizations. Firstly, it encourages honest and candid input from employees, as they feel more comfortable expressing their thoughts and concerns without fear of reprisal. This enables organizations to gather valuable insights into employee experiences, perceptions, and areas for improvement that may otherwise go unnoticed. Secondly, anonymous feedback promotes trust and transparency within the workplace. NKL-HR provides all privacy on the anonymous feedback.

  Employees can anonymously provide feedback on any topic by utilizing the dedicated create button *(7 from image.9)* on the anonymous feedback tab. The anonymous creation form includes a "Based on" field where employees can specify the subject or context of their feedback.

  1.General: Feedback related to all
  2.Employee: Feedback about an individual
  3.Department: feedback about a department
  4.Job position: Feedback about a particular job position.

Image.13

NKL-HR will display the feedback to the responsible employee(s) without revealing any details about the creator, ensuring anonymity and confidentiality.

Meetings

NKL-HR's meeting feature is designed to enhance workplace communication by providing options for both one-on-one and team meetings with employees. Whether you need to conduct performance reviews, project discussions, or collaborative brainstorming sessions, this feature ensures your meetings are organized, efficient, and effective. With built-in scheduling and notification tools, NKL-HR helps you manage meetings seamlessly, keeping everyone on the same page and driving better results across your team.

- To access the meetings page, click on the meetings tab under performance in sidebar (1 from image 1).

Users can view all created meetings and manage them here.

To create a new meeting,

- Click on the create button (2 from image 1)
- Fill out the form, the fields are:
  - Title : Title of the meeting
  - Date: Date and time of the meeting
  - Employees: Employees for the meeting
  - Manager: managers of the meeting
  - Answerable Employees: Employees present the meeting who can answer the question template

    - Question template: Template containing the questions and important topics for the meeting
    - Show response: whether show the response or not
- Users can add MoM (Minutes of meeting) by clicking on the “+” (3 from image 1) button
- To answer the meeting question template, answerable employees and managers can click on the button (4 from image 1)
- To edit the meeting users can click on the edit button (5 from image 1)
- To archive the meeting users with permission can click on the archive button (6 from image 1)
- To delete the meeting users with permission can click on the delete button (6 from image 1)

Employee Bonus Point

NKL-HR includes a reward system where employees earn bonus points for achievements or completing duties.
Managers can configure criteria for awarding bonus points under **Settings › Performance › Bonus Point Setting**, while the redemption monetary rate per point is established under **Settings › Payroll › Encashment Settings** (`Bonus Unit`).

- Toggle **Is Active** to enable or disable the bonus point rule.
- **Bonus Point Setting Form Fields:**
    - **Model:** The database record or model for awarding points.
    - **Applicable for:** Target recipient of the bonus (Owner, Members, Managers).
    - **Bonus for:** Status trigger (e.g., Completion, Closing).
    - **Field 1 & Field 2:** Model fields evaluated for the bonus trigger (e.g., Completion date vs. End date).
    - **Conditions:** Logical operator (`=`, `>`, `<`, `⩽`, `⩾`).
    - **Points:** Number of bonus points awarded.
    - **Is Active:** Activates the point award rule.

Employee Bonus Point Ledger All bonus points earned by an employee are logged in the Employee Bonus Points ledger, detailing the points credited, the underlying reason, and the award date.

Period

In summary, this view provides a centralized way to manage and track periods of time, which can be used to automate certain HR and performance management tasks. By setting the start and end dates for each period, you can ensure that feedback and OKRs are aligned with your organization's goals and objectives. The update and delete buttons make it easy to make changes to existing periods or remove them as needed. Overall, this view can help streamline

your HR and performance management processes by providing a clear framework for setting and managing time periods.

Image.17

- **Create button**

  Image.18

  `This form contains the following:`

- Period name: Name for period.
- Start date: Period start date.
- End date: End date for period
- Company: Company which will affect the period.

Question Template

Here you have the ability to create your own question template and add questions based on your specific needs or requirements. A question template provides a structure or framework for asking questions in a particular context, such as during a feedback. By creating your own template, you can tailor the questions to suit your specific goals.

Image.19

NKL-HR offers various types of questions designed for ease of use and enhanced visual representation, catering to diverse feedback needs and preferences.

Image.20

Creators can select from different question types such as Text, Rating, Boolean, Multi-choice, and Likert, allowing them to tailor questions according to their specific requirements and preferences within NKL-HR.

Last updated: 11/3/25, 11:26 AM

Previous page
Leave

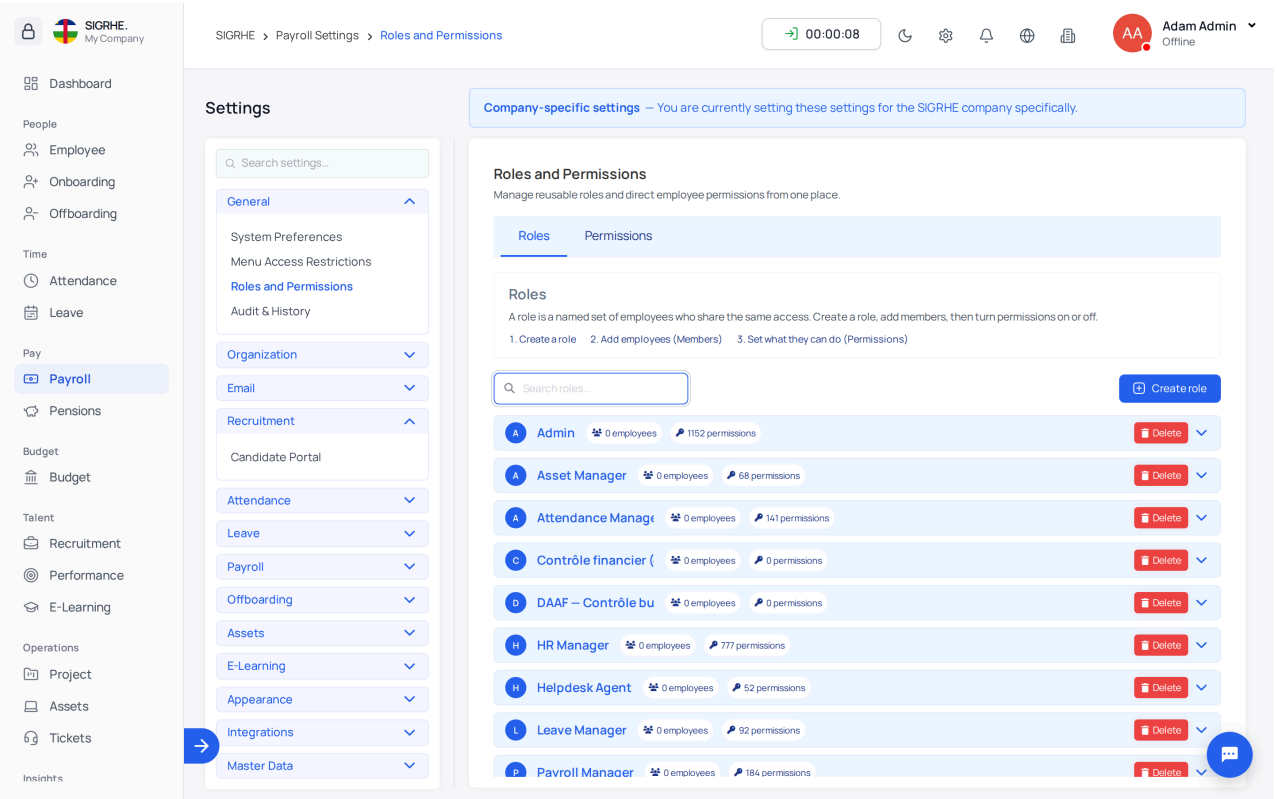
Next page
Offboarding

Permissions & Settings Reference

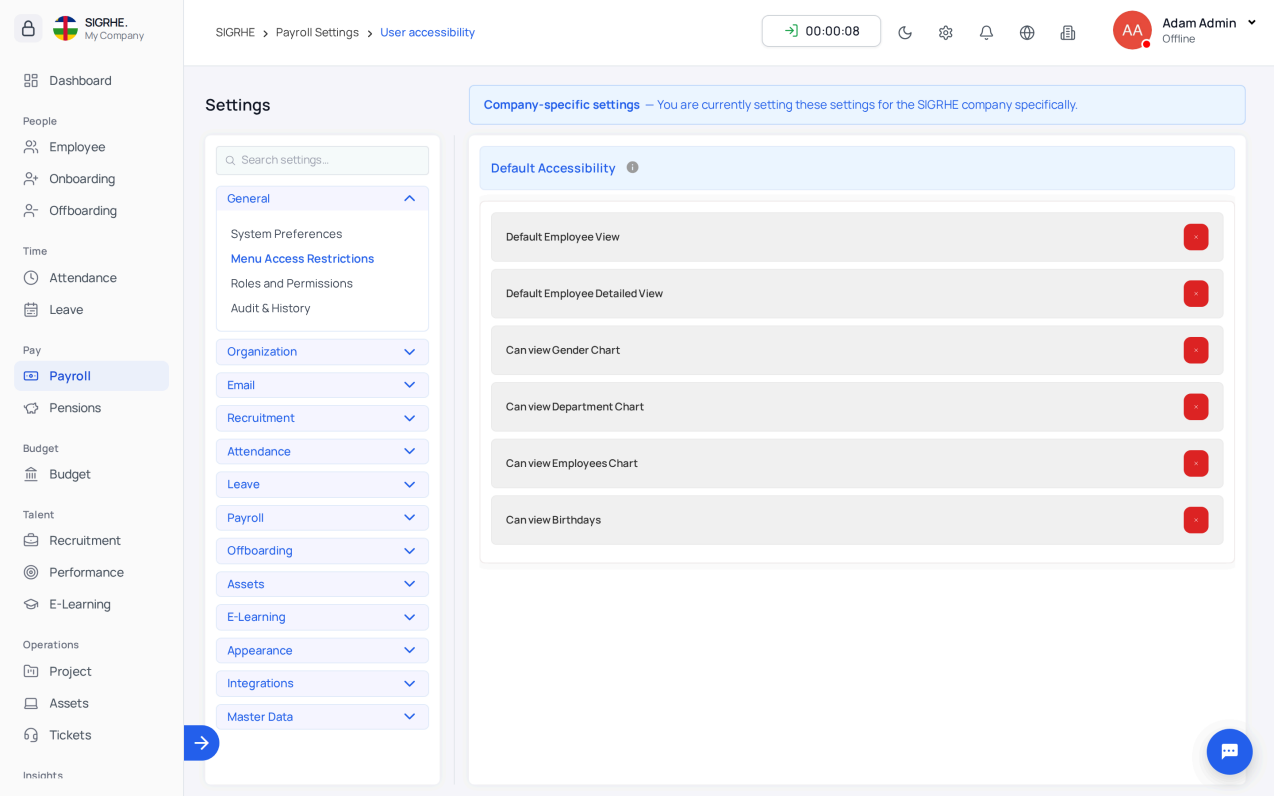
This reference outlines the role-based permission matrix governing NKL-HR HRMS modules and system administration tasks.

> **Full Settings Guide:** For the complete, detailed administrator manual covering all sections, navigation paths, and master data import workflows, see the Settings Admin Guide.

1. Role-Based Permissions Reference



Permissions are configured per ministry under `Settings › General › Roles and Permissions`. Assigning permissions through standardized roles ensures consistent security across departments.



MODULE	ADMINISTRATIVE CAPABILITY	SYSTEM PERMISSION NAME
Employee	View all employee records in directory	`View Employee`
	Create new employee records	`Add Employee`
	Edit, import, archive, bulk mail, reset passwords, invite	`Change Employee`
	Export employee directory data to spreadsheet	`Export access for employees`
	Publish, edit, and delete company policies	`Add Policy`, `Change Policy`, `Delete Policy`, `View Policy`
	Record and manage formal disciplinary actions	`Add Disciplinary Action`, `Change Disciplinary Action`, `Delete Disciplinary Action`
	Access configuration lists (shifts, schedules, work types)	`View Employee Shift`, `View Work Type`, `View Employee Tag`, etc.
Attendance	View organization-wide attendance & monthly summary	`View Attendance`

MODULE	ADMINISTRATIVE CAPABILITY	SYSTEM PERMISSION NAME
	Create, edit, and import attendance records	`Add Attendance`, `Change Attendance`
	Delete attendance entries	`Delete Attendance`
	Validate daily attendance and approve overtime hours	`Change Attendance`
	Access late arrival and early departure tracking	`View Attendance Late Come Early Out`
	Manage time policies and validation conditions	`View Attendance Validation Condition`, `Add Attendance Validation Condition`, `Change Attendance Validation Condition`
	Modify attendance rules and clock-in preferences	`Change Attendance General Setting`
	Configure IP login restrictions	`Add Attendance`
Leave	Access leave dashboard and review all employee requests	`View Leave Request`
	Create, approve, reject, or delete leave requests for others	`Add Leave Request`, `Change Leave Request`, `Delete Leave Request`
	Assign, edit, and view employee leave balance ledgers	`View Available Leave`, `Add Available Leave`, `Change Available Leave`
	Create and manage leave types	`Add Leave Type`, `Change Leave Type`, `Delete Leave Type`
	Configure restricted blackout periods	`View Restrict Leave`, `Add Restrict Leave`, `Change Restrict Leave`, `Delete Restrict Leave`
	Modify global leave rules	`Add Restrict Leave`
	Process employee leave allocation requests	`View Leave Allocation Request`, `Change Leave Allocation Request`
Onboarding	View hired candidate directory	`View Onboarding Candidate`, `View Candidate`

MODULE	ADMINISTRATIVE CAPABILITY	SYSTEM PERMISSION NAME
	Access onboarding tasks and stage pipelines	`View Onboarding Stage`, `View Recruitment` (or designated Stage Manager)
	Create new onboarding stages and manage stage order	`Add Onboarding Stage` (or designated Pipeline Manager)
	Edit or delete existing onboarding stages	`Change Onboarding Stage`, `Delete Onboarding Stage`
	Advance candidates across onboarding stages	`Change Candidate Stage` (or designated Stage Manager)
	Create, edit, and delete stage checklist tasks	`Add Onboarding Task`, `Change Onboarding Task`, `Delete Onboarding Task`
	Update candidate task completion statuses	`Change Candidate Task` (or designated Task Manager)
	Create and update candidate profiles	`Add Candidate`, `Change Candidate`
Offboarding	View offboarding dashboard and pipeline metrics	`View Offboarding`
	Create, edit, and delete exit processes	`Add Offboarding`, `Change Offboarding`, `Delete Offboarding`
	Manage exit process stages	`Add Offboarding Stage`, `Change Offboarding Stage`, `Delete Offboarding Stage`
	Advance departing employees across exit stages	`Change Offboarding` (or designated Stage Manager)
	Create, edit, and delete exit checklist tasks	`Add Offboarding Task`, `Change Offboarding Task`, `Delete Offboarding Task`
	Review employee resignation letters	`View Resignation Letter`
	Approve, reject, or decide resignation cancellations	`Change Resignation Letter`
	Modify offboarding rules and default notice period	`Change Offboarding General Setting`

MODULE	ADMINISTRATIVE CAPABILITY	SYSTEM PERMISSION NAME
E-Learning	View course listings and open the course builder	`View Course`
	Create, edit, publish, and delete courses and quizzes	`Add Course`, `Change Course`, `Delete Course`
	Create training assignments for employees or groups	`Assign Course`
	Inspect and delete training assignments	`View Course Assignment`, `Delete Course Assignment`
	Monitor learner enrolments and remove enrolments	`View Enrollment`, `Delete Enrollment`
	Download learner completion certificates across ministry	`View Certificate`
	Manage course categories and certificate templates	`View Course Category`, `Add Course Category`, `Change Course Category`, `Delete Course Category`, `View Certificate Template`, etc.
	Access course lesson files	`View Lesson`
Pension	Approve pension files and claim liquidations	`Can approve pension files` (plus specialized role groups: Liquidator, Financial Controller, Director of Pensions, Pension Payroll Officer, Parameter Administrator)

> **Note on Employee Self-Service:** Core self-service views (*My Attendances*, *My Leave Requests*, *My Learning*, *Course Catalog*, *My Certificates*) require no specialized administrative permissions.

---

2. Settings Items Permissions

SETTINGS ITEM	REQUIRED ACCESS PERMISSION
System Preferences	`View Company`, `Change Employee General Setting`, or

SETTINGS ITEM	REQUIRED ACCESS PERMISSION
	`View History Tracking Fields`
Menu Access Restrictions	`View Permission`
Roles and Permissions	Superusers only
Audit & History	`View Audit Tag` or `View Audit Model Config`
Outlook Mail	`View Dynamic Email Configuration` (when Outlook add-on is active)
Companies / Departments / Positions / Roles	`View Company` / `View Department` / `View Job Position` / `View Job Role`
Weekly Off Days	`View Company Leaves`
Email Servers	`View Dynamic Email Configuration` (when Outlook add-on is inactive)
Email Templates	`View Mail Template`
Email Automations	`View Mail Automation`
Candidate Portal	`View Recruitment`
Attendance Rules	Permissions for attendance, biometric, geofencing, or face detection settings
Leave Rules	`Add Restrict Leave` or `View Attendance Validation Condition`
Encashment Settings	`Change Encashment General Settings`
Offboarding Rules	`Change Offboarding General Setting` or `Change Payroll General Setting`
Asset Rule	`View Asset General Setting` / `Change Asset General Setting`
Course Categories / Certificate Templates	`View Course Category` / `View Certificate Template`
Color Theme	`View Color Theme`
Integrations (Drive, LinkedIn, LDAP, Meet, WhatsApp)	Designated integration permissions per service
Import Data / Import History	Superuser, or `Add Employee`, `Add Available Leave`, `Add Asset`, `Add Asset Assignment`

SETTINGS ITEM	REQUIRED ACCESS PERMISSION
Manage Tours	`View Tour` (when product tours are active)

3. System Administrator Command-Line Operations

These maintenance and setup tasks are executed via the server command line by technical administrators:

COMMAND	OPERATIONAL PURPOSE
`python manage.py migrate`	Applies all database schema migrations (including E-Learning and Pension modules).
`python manage.py compilemessages`	Compiles language translation catalogs.
`python manage.py seed_pension_pack car`	Loads the statutory Central African Republic (CAR) pension pack. Safe to run repeatedly; only provisions missing records without overwriting custom edits.
`python manage.py import_pension_data <kind> <file> [--commit] [--skip-errors]`	Command-line execution of pension data migration batches for members, service periods, contributions, beneficiaries, and active pensions.
`python manage.py elearning_resync_progress`	Recalculates learner progress percentages across active enrolments.
`python manage.py seed_elearning_demo`	Loads sample e-learning demonstration courses, categories, and quizzes (`--reset` to rebuild or `--remove` to purge).

Previous page
Settings

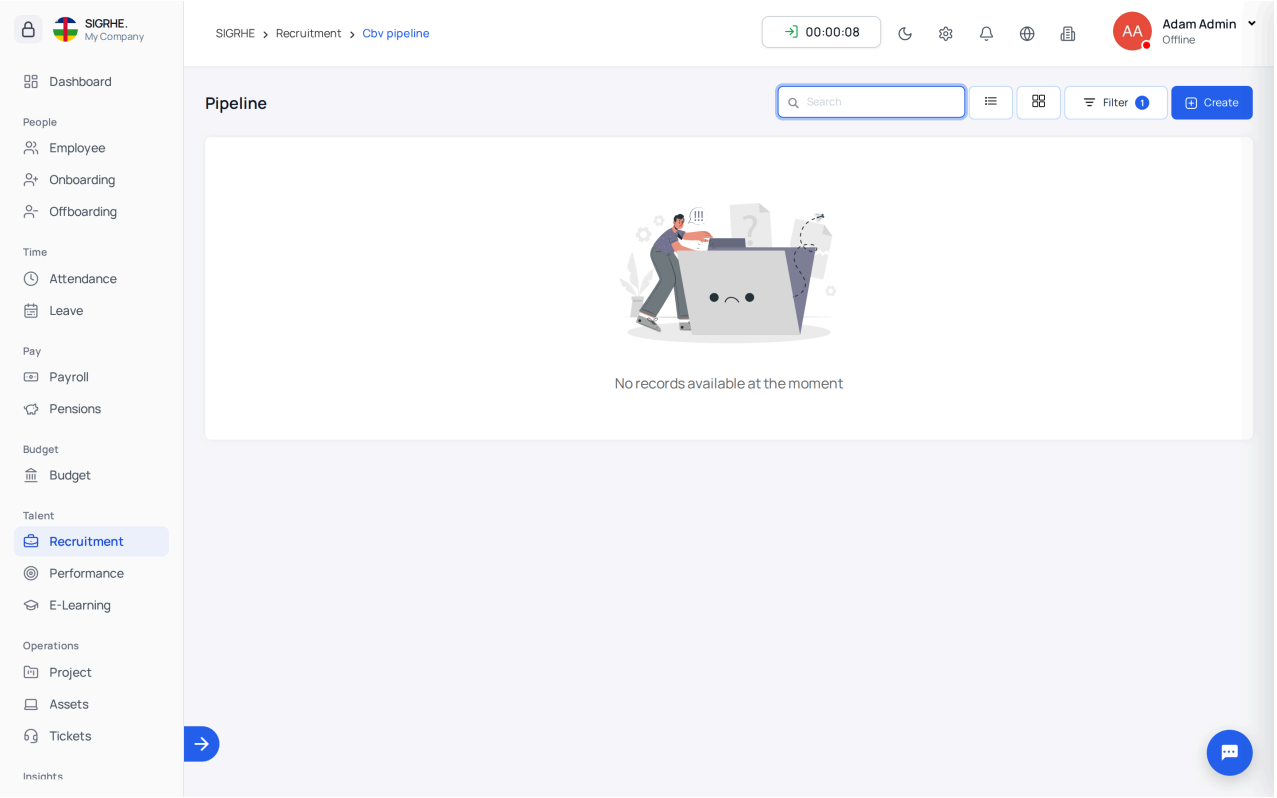
Recruitment

The **recruitment module** allows HR professionals to create and manage job postings, receive and review resumes, manage interviews, and track candidate progress throughout the hiring process.

The recruitment module allows HR professionals to:

- Create and manage job postings
- Receive and review resumes
- Manage interviews
- Track candidate progress throughout the hiring process.
- Skill zone management.
- etc...

Pipeline



The Recruitment Pipeline in NKL-HR HRMS is a comprehensive feature designed to manage the recruitment process efficiently. This feature enables companies to streamline their hiring process

by organizing candidates through various stages, assigning managers, and utilizing different views like tabular and Kanban structures. The pipeline supports multiple recruitment drives, allowing you to manage various positions simultaneously. Each drive is represented as a tab, making it easy to switch between different recruitment processes.

Recruitment

NKL-HR's recruitment process is designed to streamline and manage hiring for job positions effectively. It involves creating a recruitment entry associated with a specific job position, specifying key details, managing stages, and ultimately closing the recruitment process upon completion.

To create new recruitment click on the "+ Recruitment" button (marked as 3)

Job Position: When initiating a recruitment, you must choose the job position for which the recruitment is being conducted.

Description: Detailed description for the recruitment, is displayed on the

Vacancies: Specify the number of positions available.

Managers: Assign the managers responsible for overseeing the recruitment process.

Start and End Date: Define the timeframe for the recruitment process.

Recruitment Survey: Select the survey question templates that appear on the application form

Skills: Keyword to sort the candidates in the resume shortlist feature for the recruitment

---

Stage Management

After creating the recruitment entry, you can define and manage various stages of the hiring process. This allows you to track the progress and status of the recruitment and candidates more effectively.

The recruitment pipeline is divided into stages, with each candidate assigned to a specific stage, the stages can be created according to your hiring process. There mainly 4 main types of stages (initial,interview,hired,cancelled)

Initial: To the stages with the initial stage type, NKL-HR adds those candidates who register from the application form to it automatically. The stage is auto created when a recruitment is created later on you can edit it.

Interview: This type is used to mention whether it's the interview stage or not

Hired: Hired is the stage where candidates are hired and added to the onboarding process.

Canceled: Used to cancel the candidates from the recruitment process.

You can easily move candidates through the stages using a drag-and-drop interface (in the Kanban view) or dropdown selections (in the tabular view).

Managers can be assigned to specific stages to oversee the recruitment process, with permission to update stages, schedule interviews, and rate candidates.

To create a new stage click on the “+ Stage” button (marked as 4)

Stage: Title of the stage

Recruitment: Parent recruitment where the stage belongs to

Stage Managers: Responsible for the stage, By choosing the stage managers they can add candidates to the stages, and update their stages, add ratings.

Stage Type: Type of the stage like initial, interview , Hired, and Canceled

Monitor and manage the hiring process through the stages you have created. Ensure all steps are followed, and candidates are evaluated according to the predefined stages.

Stage/Candidate Options

Stage management options allow recruiters to add, update, and bulk-manage the various stages of the recruitment process, ensuring that candidates move smoothly through each step. On the other hand, candidate options provide the ability to rate, select, and perform actions on individual candidates or groups of candidates, such as updating their stage, viewing details, or exporting their data. Below is a detailed explanation of the marked elements focusing on these features:

Add Candidate (Marked as 6): This button, represented by a + icon, allows the recruiter to add a new candidate to the pipeline stage.

Candidate Selection Checkbox (Marked as 7): Each candidate has a checkbox beside their name, allowing the recruiter to select one or multiple candidates for bulk actions. These actions can include updating their stage, sending mass emails, or other bulk operations.

Candidate Rating (Marked as 8): The stars in this column are used to mark the candidate’s rating, providing a quick visual indication of their assessment based on interviews, resume screening, or other evaluation criteria.

Stage Dropdown (Marked as 9): This dropdown menu next to each candidate's name shows the current stage they are in (e.g., "Initial"). The recruiter can click this dropdown to change the candidate's stage in the recruitment process.

Bulk Stage Update Dropdown (Marked as 10): This dropdown at the top of the column allows the recruiter to update the stage of all selected candidates in one go. This feature is particularly useful for moving multiple candidates through stages efficiently.

Candidate Action Group (Marked as 11):

This section includes a set of icons that allow the recruiter to perform specific actions for each candidate, such as scheduling interviews, candidate notes, sending emails, or exporting their

resume and adding to skill zone.

Interview (Marked as 12):

The Scheduled Interview feature in NKL-HR HRMS is an integral part of the recruitment process, allowing HR managers and recruiters to efficiently manage interviews with candidates. This feature streamlines the process by enabling users to schedule interviews directly from the recruitment pipeline interface.

Send Mail (Marked as 13):

The Send Mail feature in NKL-HR HRMS allows recruiters and HR managers to efficiently communicate with candidates directly from the recruitment pipeline interface. This feature is designed to streamline email communication, enabling users to compose, customize, and send emails to candidates as part of the recruitment process.

Skill Zone (Marked as 14):

The Skill Zone feature is designed to streamline the recruitment process by categorizing candidates based on their skills and matching them to relevant job positions within the organization. This feature helps recruiters quickly identify candidates with the desired skill sets, improving the efficiency of the hiring process.

Note (Marked as 15):

Managers can use the candidate note option to record notes related to the candidate, making these notes visible to both recruitment and stage managers, which helps keep everyone informed about the candidate's progress and important details.

Resume (Marked as 16):

The Resume feature is a simple functionality designed to redirect users to their resume page within the application. This feature ensures a seamless navigation experience, allowing users to quickly access and update their resumes.

Hire Candidate

Once you put the candidate on the hired stage with the `hired` stage type, then now the candidate’s onboarding process may start by going through the onboarding process in NKL-HR.

Kanban

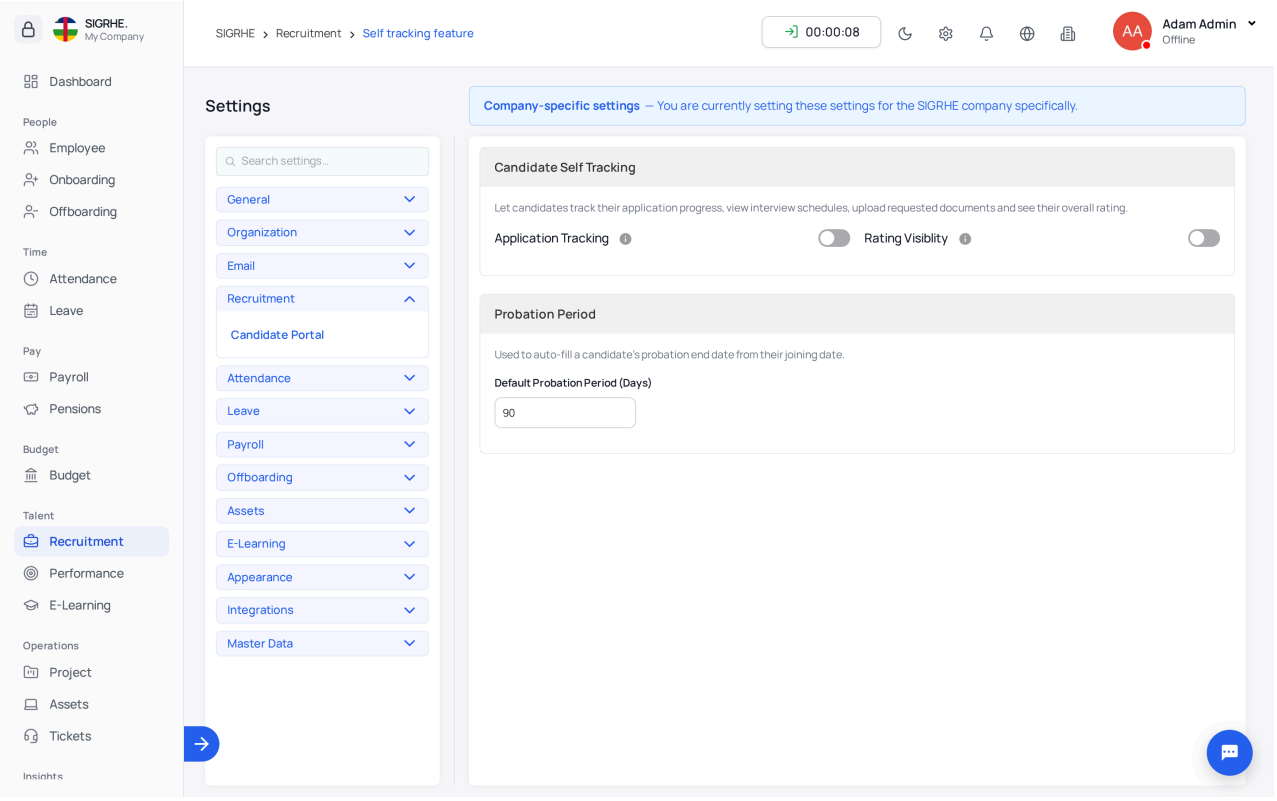
Kanban is the suggested view when many applicants are in the hiring process. From here all the functionality in the pipeline like notes, and send-mail are available in the three dots.

Last updated: 10/24/25, 2:58 PM

Next page
Introduction

Candidate self tracking

The **Candidate Self-Tracking** feature allows candidates to monitor their recruitment progress. This includes checking their status (e.g., hired, rejected, or pending), viewing scheduled interviews, uploading required documents, and communicating with recruiters or managers through notes.



Enabling Candidate Self-Tracking

Admins configure candidate portal access in Settings:

1. **Navigate to Settings**:
   Click the **gear icon** in the top navigation bar.
2. **Open Candidate Portal**:
   Go to `Settings › Recruitment › Candidate Portal`.
3. **Configure Options**:
   - **Application Tracking**: Toggle on to let candidates follow their own application's progress through recruitment stages.

- **Rating Visibility**: Toggle on if you want candidates to see interview ratings and evaluations.

Overview of the Candidate Self-Tracking Page

The Candidate Self-Tracking page provides a clear overview of recruitment progress through various sections:

1. Candidate Information Card

This card displays essential details (marked as 1 in the image), including:

- The candidate's full name and profile picture
- The recruitment, stage and job position the candidate has applied for.
- The candidate's application status (e.g., hired, rejected, or in progress).
- Ratings, if enabled.

2. Scheduled Interviews

Candidates can view interview details in the **Scheduled Interviews** card (marked as 2 in the image):

- Interview **date**, **time**, and **interviewer** details.
- A description of the interview (if provided).
- The interview status, which can be one of the following:
  - **Upcoming**
  - **Today**
  - **Completed**
  - **Expired**

3. Document Requests

The **Documents** card (marked as 3 in the image) enables candidates to:

- View documents requested by the admin or managers.
- Upload the required documents for review.

Admins and managers can view uploaded documents from the candidate's profile and either approve, reject or delete them.

- Candidates can see the document status:
  - **Uploaded**
  - **Approved**
  - **Rejected**

Rejected documents can be reuploaded by the candidate.

4. Notes

The **Notes** card (marked as 4 in the image) allows two-way communication between candidates and recruiters:

- Candidates can add notes by typing in the input field and pressing **Enter**.
- Managers can view these notes from the candidate's profile or the recruitment pipeline.

Additional functionality includes:

- **Visibility Control**: Notes added by managers are hidden from candidates by default. To make them visible, managers can enable the **Candidates Can View** option marked as 1 in the below image.
- **Notifications**: When a candidate adds a note, recruitment managers and stage managers receive notifications.
- **Note Management**: Candidates can delete their own notes but cannot remove notes added by others.

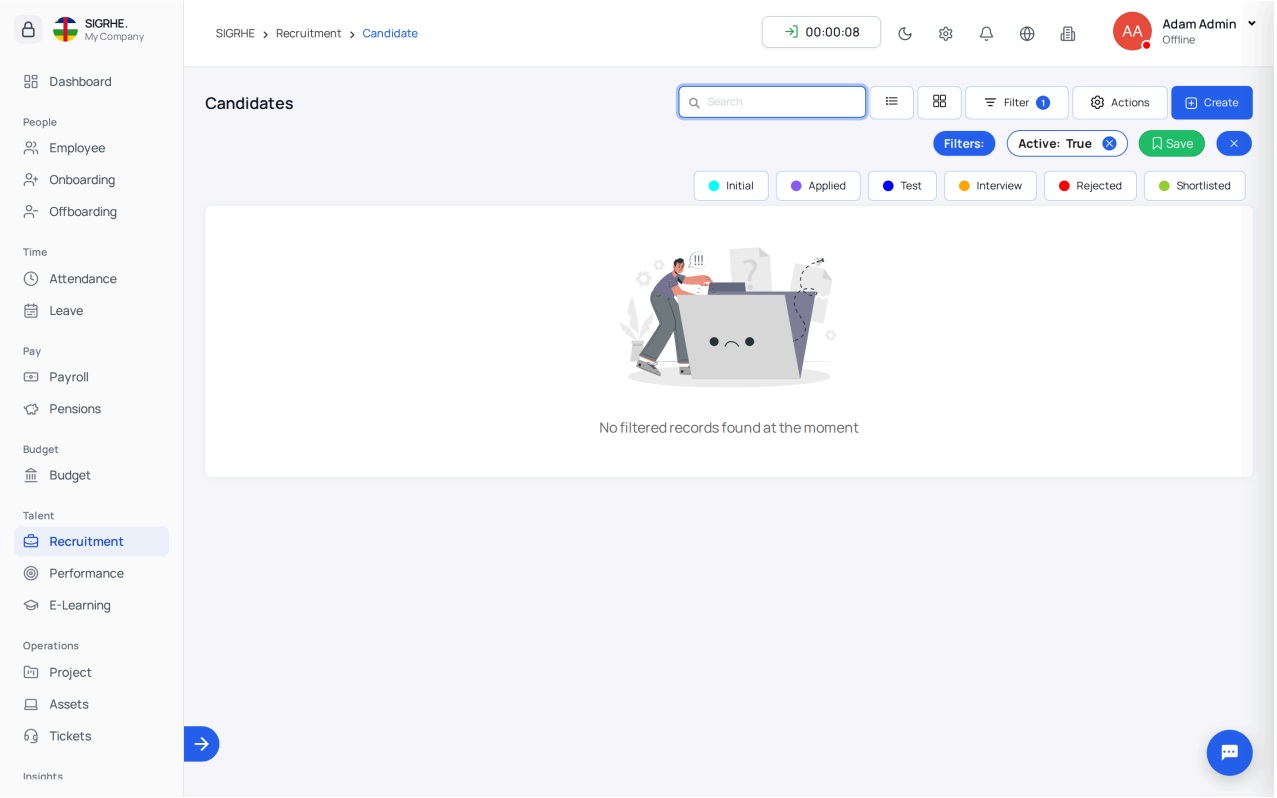
By enabling and utilizing the Candidate Self-Tracking feature, admins and managers can ensure transparency in the recruitment process and foster seamless communication with candidates.

Last updated: 10/24/25, 2:58 PM

Previous page
Resume Shortlisting

Next page
Onboarding

Candidate Directory



All the candidates that are available in the Candidate section, under the recruitment menu. Here we have both the Kanban view and the list view of candidates. The navbar includes a search bar filter and group by option. Inside the action button, we have export, bulk archive, and bulk unarchive options.

Search Bar (Marked as 25)**:** The search functionality enables users to quickly find candidates by typing in relevant keywords such as name, email, or department.

Display View Toggle (Marked as 26)**:** This option allows users to switch between different views of the candidate list, such as grid view or list view, providing flexibility in how candidate information is presented.

Filter (Marked as 27): The filter button allows users to refine the list of candidates based on various criteria like department, status (hired, not hired, canceled), or other custom fields.

Group By (Marked as 28): This feature groups the candidates by specific attributes, such as department or job role, helping users to organize and visualize the candidate data more effectively.

Actions (Marked as 25):

The actions dropdown provides options to perform bulk operations on selected candidates, such as sending emails, exporting data, resume shortlisting, archiving, un-archive, and deleting.

Create Button (Marked as 25): The create button allows users to add a new candidate manually to the recruitment pipeline.

Candidate List View (Marked as 26)

The Candidate List View(Marked as 26) in NKL-HR HRMS provides a detailed and organized way to manage candidates. This feature offers a clear tabular view of candidate information, making it easier to compare and analyze candidates at a glance.The Select All Candidates button is used to select all the candidates and perform the bulk actions. A checkbox at the beginning of each row allows users to select multiple candidates for bulk actions, such as moving them to different stages, exporting, or deleting.The quick filter options helps to filter instantly with the status. By opening (clicking) the candidate (Marked as 29) You will be redirected to candidate Detailed View. The action group feature is used to do the edit, archive and delete the candidate.

Candidate Detailed View

The Candidate detailed view feature in NKL-HR HRMS provides a comprehensive overview of individual candidates. The following elements are present in the view:

Convert to Employee Button (Marked as 31): Located in the upper-right section, this green button allows the HR user to convert the candidate into an employee. It’s a critical action button that signifies the transition from candidate to employee status.

Rating Feature (Marked as 32): Below the "Convert to Employee" button, there is a average rating display that allowing HR personnel view the rating. This feature helps in assessing the candidate's overall evaluation based on interviews and other criteria.

Navigation Tabs (Marked as 33): A horizontal tab navigation bar provides quick access to different sections related to the candidate:

About: Displays the candidate’s basic information such as name, email, phone number, personal, recruitment information and etc...

Resume: This tab shows the candidate's resume.

Survey: Contains any surveys the candidate may have completed.

Notes: Allows HR personnel to view and add notes related to the candidate.

History: Shows the history of the candidate's interactions and progress through the recruitment stages.

Rating: Displays all the ratings done by HR managers for the candidate.

Mail Log: Lists all emails sent to the candidate.

Scheduled Interviews: Contains information about interviews scheduled with the candidate.

The Candidate detailed view is designed to give HR personnel a centralized location to manage and evaluate a candidate throughout the recruitment process, with easy access to essential tools and information.

Candidate Form

The Candidate Create (click 25 from candidate directory) feature in NKL-HR HRMS allows HR personnel to add a new candidate to the system. The interface is designed for ease of use, ensuring that all essential candidate information is captured during the creation process. Here are the key components and features:

Profile Picture (Initials): At the top left, the candidate's initials are displayed within a circular profile picture placeholder. This is auto-generated based on the name provided.

Name: A mandatory field where the candidate's full name is entered.

Email: Another mandatory field for the candidate's email address.

Recruitment: A required dropdown field that allows the user to select the specific recruitment drive or campaign the candidate is being added to.

Date of Birth: A date picker to input the candidate's date of birth.

Address: A text field to enter the candidate's address.

Country, State, Zip: Fields for the candidate's location details.

Portfolio: A field for entering a link to the candidate's portfolio, if available.

Mobile: A field for the candidate's mobile number.

Job Position: Dropdown to specify the position the candidate is being considered for.

Gender: A required field to select the candidate’s gender.

Source: A dropdown field to select how the candidate was referred (e.g., job portal, employee referral, etc.).

Referral: A dropdown to specify if the candidate was referred by someone within the company.

Resume: File upload feature to attach the candidate’s resume.

Is Active: A toggle switch to indicate if the candidate is currently active in the recruitment process.

Canceled: A toggle switch to indicate if the candidate has withdrawn or been removed from the process.

Save Button: Located at the bottom right of the form, the "Save" button allows the user to save the new candidate's details once all mandatory fields are completed.

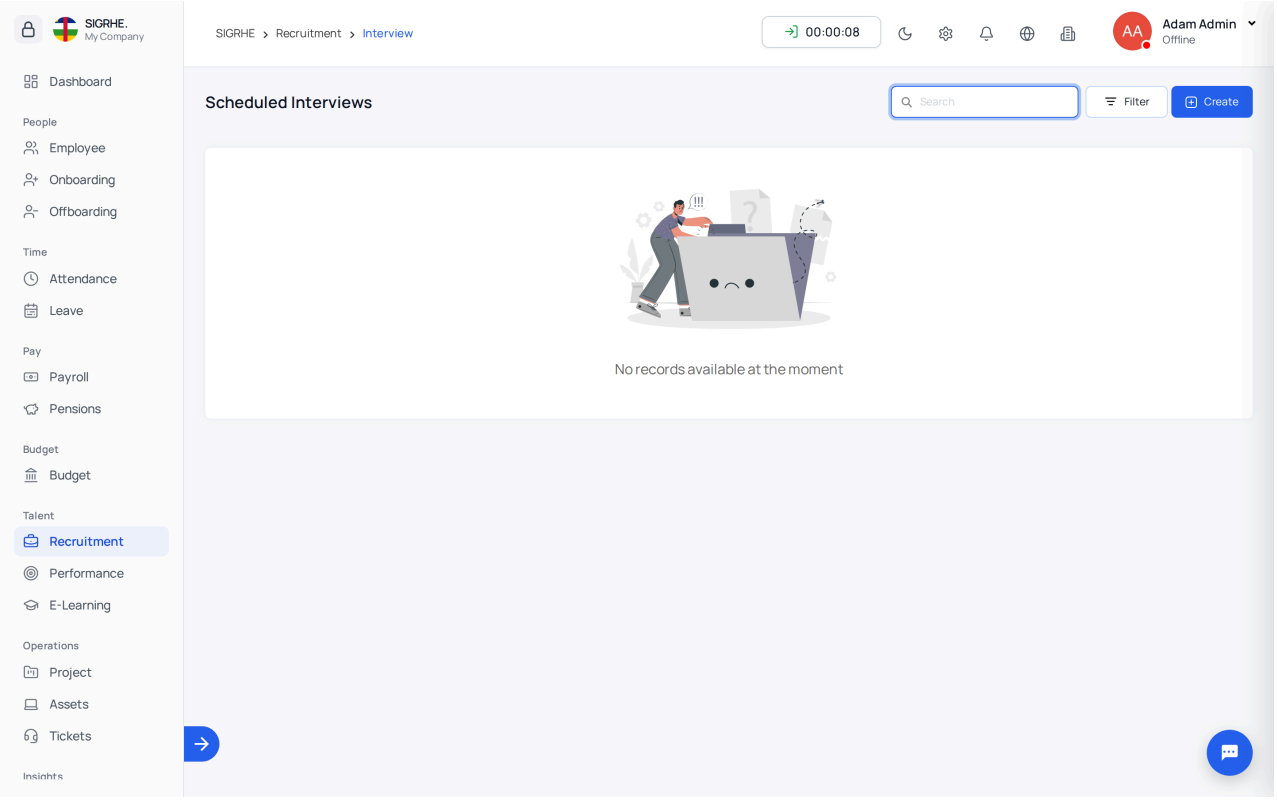
Last updated: 10/24/25, 2:58 PM

Previous page
Recruitment

Next page
Job Openings

Interviews Management

The Interview Schedule feature allows users to efficiently manage and keep track of interviews within the recruitment process. To access the feature On the left-hand side menu under the "Recruitment" section, click on Interview (marked as 43). This will bring you to the "Scheduled Interviews" page.



Scheduled Interviews List: The main section displays a list of scheduled interviews, providing a clear overview of all upcoming and past interviews.

Candidate: The name of the candidate scheduled for the interview.

Interviewer: Number of interviewers assigned.

Interview Date: The date when the interview is scheduled.

Interview Time: The time the interview is set to begin.

Description: Any additional notes or comments regarding the interview.

Status: The current status of the interview, such as:

Interview Completed (marked with a green checkmark)

Expired Interview (marked with a red cross)

Interview Today (marked with a blue calendar icon)

Actions Group: Each scheduled interview has associated action icons under the "Actions" column:

Edit (pencil icon): Allows you to modify the details of the interview.

Delete (trash bin icon): Enables you to remove the interview from the schedule.

Search (Marked as 44): The search bar at the top allows you to quickly find specific interviews by typing in the candidate's name, interviewer, or any other related keyword.

Filter (Marked as 45): The filter option helps in narrowing down the list based on specific criteria such as date, status, or interviewers, making it easier to manage a large number of scheduled interviews.

Create (Marked as 46):To schedule a new interview, click on the **Create** button. This opens a form where you can enter the candidate's name, assign interviewers, set the date and time, and add any relevant notes or descriptions.

Last updated: 10/24/25, 2:58 PM

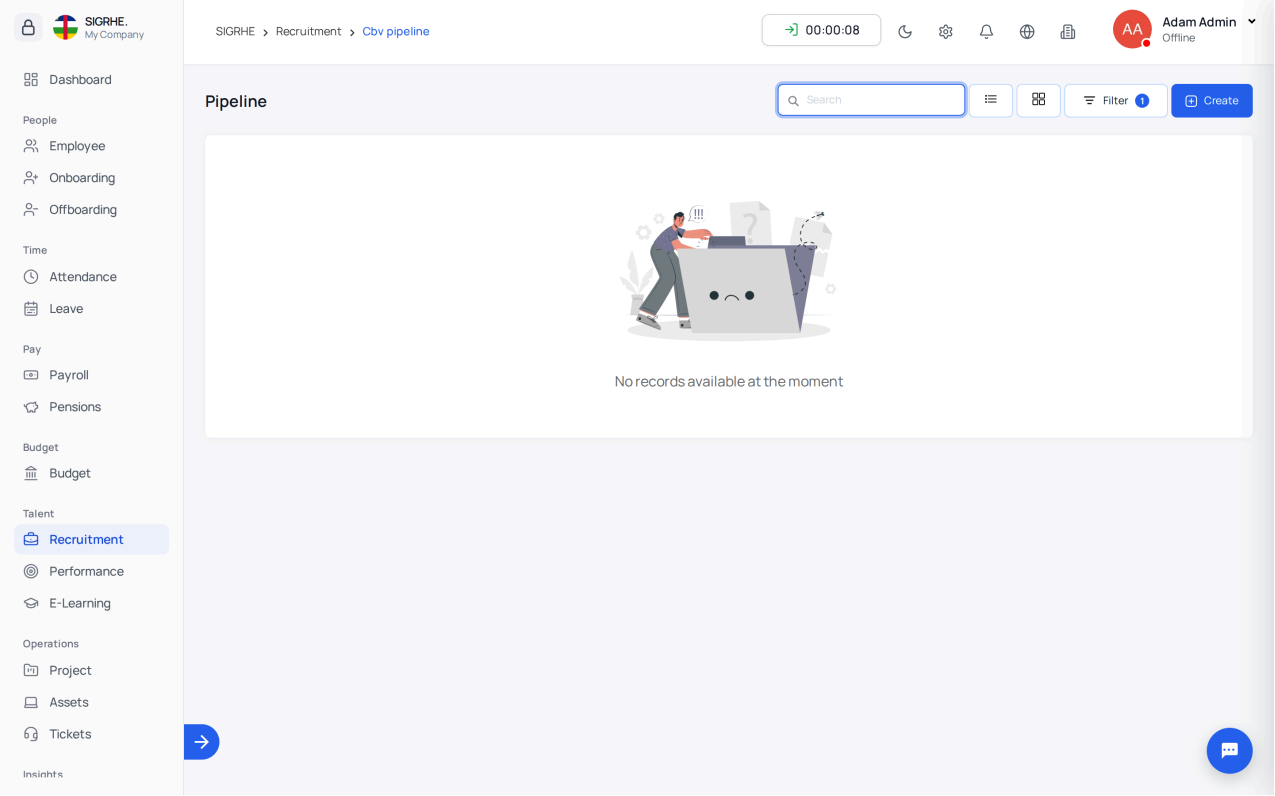
Previous page
Stages

Next page
Survey & Open Jobs

Recruitment

The **recruitment module** allows HR professionals to create and manage job postings, receive and review resumes, manage interviews, and track candidate progress throughout the hiring process.

Pipeline



The Recruitment Pipeline in NKL-HR HRMS is a comprehensive feature designed to manage the recruitment process efficiently. This feature enables companies to streamline their hiring process by organizing candidates through various stages, assigning managers, and utilizing different views like tabular and Kanban structures. The pipeline supports multiple recruitment drives, allowing you to manage various positions simultaneously. Each drive is represented as a tab, making it easy to switch between different recruitment processes.

RecruitmentNKL-HR's recruitment process is designed to streamline and manage hiring for job positions effectively. It involves creating a recruitment entry associated with a specific job

position, specifying key details, managing stages, and ultimately closing the recruitment process upon completion.

To create new recruitment click on the “+ Recruitment” button (marked as 3)

Job Position: When initiating a recruitment, you must choose the job position for which the recruitment is being conducted.

Description: Detailed description for the recruitment, is displayed on the

Vacancies: Specify the number of positions available.

Managers: Assign the managers responsible for overseeing the recruitment process.

Start and End Date: Define the timeframe for the recruitment process.

Recruitment Survey: Select the survey question templates that appear on the application form

Skills: Keyword to sort the candidates in the resume shortlist feature for the recruitment

Stage Management

After creating the recruitment entry, you can define and manage various stages of the hiring process. This allows you to track the progress and status of the recruitment and candidates more effectively.

The recruitment pipeline is divided into stages, with each candidate assigned to a specific stage, the stages can be created according to your hiring process. There mainly 4 main types of stages (initial,interview,hired,cancelled)

Initial: To the stages with the initial stage type, NKL-HR adds those candidates who register from the application form to it automatically. The stage is auto created when a recruitment is created later on you can edit it.

Interview: This type is used to mention whether it's the interview stage or not

Hired: Hired is the stage where candidates are hired and added to the onboarding process.

Canceled: Used to cancel the candidates from the recruitment process.

You can easily move candidates through the stages using a drag-and-drop interface (in the Kanban view) or dropdown selections (in the tabular view).

Managers can be assigned to specific stages to oversee the recruitment process, with permission to update stages, schedule interviews, and rate candidates.

To create a new stage click on the “+ Stage” button (marked as 4)

Stage: Title of the stage

Recruitment: Parent recruitment where the stage belongs to

Stage Managers: Responsible for the stage, By choosing the stage managers they can add candidates to the stages, and update their stages, add ratings.

Stage Type: Type of the stage like initial, interview , Hired, and Canceled

Monitor and manage the hiring process through the stages you have created. Ensure all steps are followed, and candidates are evaluated according to the predefined stages.

Stage or Candidate Options Stage management options allow recruiters to add, update, and bulk-manage the various stages of the recruitment process, ensuring that candidates move smoothly through each step. On the other hand, candidate options provide the ability to rate, select, and perform actions on individual candidates or groups of candidates, such as updating their stage, viewing details, or exporting their data. Below is a detailed explanation of the marked elements focusing on these features:

Add Candidate (Marked as 6): This button, represented by a + icon, allows the recruiter to add a new candidate to the pipeline stage.

Candidate Selection Checkbox (Marked as 7): Each candidate has a checkbox beside their name, allowing the recruiter to select one or multiple candidates for bulk actions. These actions can include updating their stage, sending mass emails, or other bulk operations.

Candidate Rating (Marked as 8): The stars in this column are used to mark the candidate's rating, providing a quick visual indication of their assessment based on interviews, resume screening, or other evaluation criteria.

Stage Dropdown (Marked as 9): This dropdown menu next to each candidate's name shows the current stage they are in (e.g., "Initial"). The recruiter can click this dropdown to change the candidate's stage in the recruitment process.

Bulk Stage Update Dropdown (Marked as 10): This dropdown at the top of the column allows the recruiter to update the stage of all selected candidates in one go. This feature is particularly useful for moving multiple candidates through stages efficiently.

Candidate Action Group (Marked as 11):

This section includes a set of icons that allow the recruiter to perform specific actions for each candidate, such as scheduling interviews, candidate notes, sending emails, or exporting their resume and adding to skill zone.

Interview (Marked as 12):

The Scheduled Interview feature in NKL-HR HRMS is an integral part of the recruitment process, allowing HR managers and recruiters to efficiently manage interviews with candidates. This feature streamlines the process by enabling users to schedule interviews directly from the recruitment pipeline interface.

Send Mail (Marked as 13): The Send Mail feature in NKL-HR HRMS allows recruiters and HR managers to efficiently communicate with candidates directly from the recruitment pipeline interface. This feature is designed to streamline email communication, enabling users to compose, customize, and send emails to candidates as part of the recruitment process.

Skill Zone (Marked as 14): The Skill Zone feature is designed to streamline the recruitment process by categorizing candidates based on their skills and matching them to relevant job positions within the organization. This feature helps recruiters quickly identify candidates with the desired skill sets, improving the efficiency of the hiring process.

Note (Marked as 15):

**** Managers can use the candidate note option to record notes related to the candidate, making these notes visible to both recruitment and stage managers, which helps keep everyone informed about the candidate's progress and important details.

Resume (Marked as 16): The Resume feature is a simple functionality designed to redirect users to their resume page within the application. This feature ensures a seamless navigation experience, allowing users to quickly access and update their resumes.

Resume Shortlisting

The task of shortlisting resumes can be a daunting process for HR professionals. With numerous applications flooding in for every job posting, identifying the best candidates quickly and efficiently is crucial. One of the most effective methods for streamlining this process is through skill-based keyword optimization. By focusing on specific skills, HRs can significantly reduce the time spent sifting through resumes and increase the accuracy of selecting the most qualified candidates.

Skill-based keywords are specific abilities or competencies that are critical to a particular job role. They often include technical skills, soft skills, certifications, and experience with particular tools or technologies. These keywords are derived from the job description and are essential for matching resumes to the job requirements.

Accessing Resume Shortlisting

1. In the recruitment pipeline, click on the three dots(Marked as 17) on the tab heads.
2. Select “Resume Shortlisting” from the dropdown menu (Marked as 18).

Adding Resumes

1. Click on the “+” button to add resumes(Marked as 19).
2. You can add multiple files at once

Automated Scoring

1. After adding the resumes, the system will automatically calculate the scores for each resume (Marked as 20).
2. The scoring is based on the number of skills present in each resume that match the required skills for the recruitment.
3. Resumes will be displayed in descending order of their scores.

Creating Candidates

1. Click on the “Create Candidate” (Marked as 21) button to be redirected to the candidate creation form.
2. The form will be auto-filled with data extracted from the resume.
3. Verify the accuracy of the information in the fields by checking the preview of the resume on the right side.
4. Submit the form to create the candidate.

5. To create another candidate, return to the previous tab and click on the “Create Candidate” button again to repeat the process.

Important Note

- Some types of PDFs, such as image PDFs or scanned PDFs, cannot be read by the system. These resumes will be marked as “Need Verification” in the score column.

Hire Candidate

Once you put the candidate on the hired stage with the `hired` stage type, then now the candidate’s onboarding process may start by going through the onboarding process in NKL-HR.

Kanban

Kanban is the suggested view when many applicants are in the hiring process. From here all the functionality in the pipeline like notes, and send-mail are available in the three dots.

Candidate Directory

All the candidates that are available in the Candidate section (Marked as 24), under the recruitment menu. Here we have both the Kanban view and the list view of candidates. The navbar includes a search bar filter and group by option. Inside the action button, we have export, bulk archive, and bulk unarchive options.

Search Bar (Marked as 25)**:** The search functionality enables users to quickly find candidates by typing in relevant keywords such as name, email, or department.

Display View Toggle (Marked as 26)**:** This option allows users to switch between different views of the candidate list, such as grid view or list view, providing flexibility in how candidate information is presented.

Filter (Marked as 27): The filter button allows users to refine the list of candidates based on various criteria like department, status (hired, not hired, canceled), or other custom fields.

Group By (Marked as 28): This feature groups the candidates by specific attributes, such as department or job role, helping users to organize and visualize the candidate data more effectively.

Actions (Marked as 25): The actions dropdown provides options to perform bulk operations on selected candidates, such as sending emails, exporting data, resume shortlisting, archiving, un-archive, and deleting.

Create Button (Marked as 25): The create button allows users to add a new candidate manually to the recruitment pipeline.

Candidate List View(Marked as 26)**:**

The Candidate List View(Marked as 26) in NKL-HR HRMS provides a detailed and organized way to manage candidates. This feature offers a clear tabular view of candidate information, making it easier to compare and analyze candidates at a glance.The Select All Candidates button is used

to select all the candidates and perform the bulk actions. A checkbox at the beginning of each row allows users to select multiple candidates for bulk actions, such as moving them to different stages, exporting, or deleting.The quick filter options helps to filter instantly with the status. By opening (clicking) the candidate (Marked as 29) You will be redirected to candidate Detailed View. The action group feature is used to do the edit, archive and delete the candidate.

Candidate Detailed View

The Candidate detailed view feature in NKL-HR HRMS provides a comprehensive overview of individual candidates. The following elements are present in the view:

Convert to Employee Button (Marked as 31): Located in the upper-right section, this green button allows the HR user to convert the candidate into an employee. It's a critical action button that signifies the transition from candidate to employee status.

Rating Feature (Marked as 32): Below the "Convert to Employee" button, there is a average rating display that allowing HR personnel view the rating. This feature helps in assessing the candidate's overall evaluation based on interviews and other criteria.

Navigation Tabs (Marked as 33): A horizontal tab navigation bar provides quick access to different sections related to the candidate:

About: Displays the candidate's basic information such as name, email, phone number, personal, recruitment information and etc...

Resume: This tab shows the candidate's resume.

Survey: Contains any surveys the candidate may have completed.

Notes: Allows HR personnel to view and add notes related to the candidate.

History: Shows the history of the candidate's interactions and progress through the recruitment stages.

Rating: Displays all the ratings done by HR managers for the candidate.

Mail Log: Lists all emails sent to the candidate.

Scheduled Interviews: Contains information about interviews scheduled with the candidate.

The Candidate detailed view is designed to give HR personnel a centralized location to manage and evaluate a candidate throughout the recruitment process, with easy access to essential tools and information.

Candidate Form

The Candidate Create (click 25 from candidate directory) feature in NKL-HR HRMS allows HR personnel to add a new candidate to the system. The interface is designed for ease of use, ensuring that all essential candidate information is captured during the creation process. Here are the key components and features:

Profile Picture (Initials): At the top left, the candidate's initials are displayed within a circular profile picture placeholder. This is auto-generated based on the name provided.

Name: A mandatory field where the candidate's full name is entered.

Email: Another mandatory field for the candidate's email address.

Recruitment: A required dropdown field that allows the user to select the specific recruitment drive or campaign the candidate is being added to.

Date of Birth: A date picker to input the candidate's date of birth.

Address: A text field to enter the candidate's address.

Country, State, Zip: Fields for the candidate's location details.

Portfolio: A field for entering a link to the candidate's portfolio, if available.

Mobile: A field for the candidate's mobile number.

Job Position: Dropdown to specify the position the candidate is being considered for.

Gender: A required field to select the candidate’s gender.

Source: A dropdown field to select how the candidate was referred (e.g., job portal, employee referral, etc.).

Referral: A dropdown to specify if the candidate was referred by someone within the company.

Resume: File upload feature to attach the candidate’s resume.

Is Active: A toggle switch to indicate if the candidate is currently active in the recruitment process.

Canceled: A toggle switch to indicate if the candidate has withdrawn or been removed from the process.

Save Button: Located at the bottom right of the form, the "Save" button allows the user to save the new candidate's details once all mandatory fields are completed.

Recruitment View

Recruitment View Overview

The Recruitment View allows administrators and managers to manage all active recruitments in the system. By navigating to the “Recruitment” tab within the recruitment interface (marked as 34), users can access a comprehensive list of all recruitments.

New Recruitment(Marked as 37): Users can create a new recruitment by clicking the “+ Create” button located at the top right corner of the interface (similiar to create recruitment from the pipeline). This allows for adding new recruitment drives directly from the recruitment overview page.

Search Bar(Marked as 35): Located at the top right of the recruitment list, it allows users to search for specific recruitments by name or keyword.

Filters(35): By default, a “Closed: false” filter is applied, which means only active (open) recruitments are shown. Users can add or remove filters to customize their view, helping to focus on specific recruitment statuses or criteria. Quick filters are available for easy sorting, with color-

coded borders around list items for visual identification of the recruitment status (e.g., green for open, red for closed).

Recruitment List: The list displays essential details for each recruitment, including:

Recruitment Title: The title of the recruitment drive.

Managers: Number of managers involved in the recruitment.

Open Jobs: The number of job positions open under each recruitment.

Vacancy: The total number of available vacancies.

Total Hires: Displays the number of candidates hired out of the total number of candidates for that recruitment.

Start Date: The start date of the recruitment drive.

End Date: The end date of the recruitment drive.

Action Column:Users can perform various actions on each recruitment drive using the buttons in the action column:

- **Edit**: Modify the recruitment details.
  - **Duplicate**: Create a copy of the recruitment drive.
    - **Archive**: Move the recruitment to an archived status.
    - **Delete**: Permanently remove the recruitment drive.
    - **Share**: Generate a shareable link for the recruitment drive.

Stages

The Stages feature streamlines the hiring process by allowing users to manage the various stages of recruitment with ease to access On the left-hand side menu, under the "Recruitment" section, click on Stages (marked as 38). This will take you to the Stages management page.

Stages List: The stages are organized under different recruitment drives. For example, "Recruitment Drive" and "FutureForce Recruitment" are two drives shown in the screenshot. For each recruitment, the number of managers involved is displayed alongside the stages type, like "Initial" or "Hired".

Stage Actions(Marked as 42)**🤫*Each stage has action icons to **edit** (pencil icon), **duplicate** (copy icon), or **delete** (trash bin icon) the stage. These actions are located under the "Actions" column.

Search(Marked as 39)**:** The search bar allows you to quickly find specific stages or recruitment drives. Simply type the relevant keywords, and the results will filter accordingly.

Filter(Marked as 40)**:** Use the filter option to narrow down the displayed stages based on specific criteria. This helps in managing a large number of stages efficiently.

Create (Marked as 41): To add a new stage, click on the **Create** button. This will open a form where you can define(Similiar to the stage creation from the recruitment pipline) the new stage's details, including the title, managers involved, and type.

Interview Management

The Interview Schedule feature allows users to efficiently manage and keep track of interviews within the recruitment process. To access the feature On the left-hand side menu under the "Recruitment" section, click on Interview (marked as 43). This will bring you to the "Scheduled Interviews" page.

Scheduled Interviews List: The main section displays a list of scheduled interviews, providing a clear overview of all upcoming and past interviews.

Candidate: The name of the candidate scheduled for the interview.

Interviewer: Number of interviewers assigned.

Interview Date: The date when the interview is scheduled.

Interview Time: The time the interview is set to begin.

Description: Any additional notes or comments regarding the interview.

Status: The current status of the interview, such as:

Interview Completed (marked with a green checkmark)

Expired Interview (marked with a red cross)

Interview Today (marked with a blue calendar icon)

Actions Group: Each scheduled interview has associated action icons under the "Actions" column:

Edit (pencil icon): Allows you to modify the details of the interview.

Delete (trash bin icon): Enables you to remove the interview from the schedule.

Search (Marked as 44)**:** The search bar at the top allows you to quickly find specific interviews by typing in the candidate's name, interviewer, or any other related keyword.

Filter (Marked as 45)**:** The filter option helps in narrowing down the list based on specific criteria such as date, status, or interviewers, making it easier to manage a large number of scheduled interviews.

Create (Marked as 46)**😗*To schedule a new interview, click on the **Create** button. This opens a form where you can enter the candidate's name, assign interviewers, set the date and time, and add any relevant notes or descriptions.

Recruitment Survey

It offers HR managers and recruiters a powerful tool to create custom questionnaires for applicants. This not only simplifies applications but also revolutionizes how we gather and understand crucial data. To access the Survey feature navigate. To access the featur navigate to recruitment survey section (Marked as 47).

Create Template(Template)😗*To add a new category, click on the **+ (Add) button in the Templates section (marked as 48). This allows you to create a new template that can house related survey questions.

Creating New Survey Questions:

Within each template (category), you can add individual survey questions. Click on the **+ (Add)** button in the Questions section (marked as 50) to create a new question. Specify the question text and choose the appropriate type (e.g., number, text, multiple choice).Save the question to ensure it's available under the correct template.

Template: Template of the question(Optional)

Is Mandatory: Mention question is required or not

Recruitment: The question is asked in the applications for recruitment.

Question: The actual question

Sequence: Sequence where the questions ordered while displaying on the survey

Type: Type of the question like yes/no, choices, etc....

Open Jobs and Application Form

For convenient access to all open job positions, the system provides a straightforward. Lastly, the platform enables the sharing of open job opportunities with candidates or through various channels such as the company website and social media platforms, enhancing visibility and engagement in the recruitment process. To access the open jobs and application form feature(Marked as 51).

The open recruitment platform can be publicly accessed via the company website or social media platforms after sharing. Once shared, applicants can access the open jobs and follow. Click Apply Now (Marked as 51) or Details(Marked as 53) and apply Now (Marked as 54) button,

applicants can easily fill in their information and access the customized survey or questionnaire created for the recruitment process.

Once the application survey is completed the registration process also completes. The candidate will available at related recruitment initial stage and at the candidate directory

Skill Zone

The Skill Zone feature is designed to streamline the recruitment process by categorizing candidates based on their skills and matching them to relevant job positions within the organization. This feature helps recruiters quickly identify candidates with the desired skill sets, improving the efficiency of the hiring process.

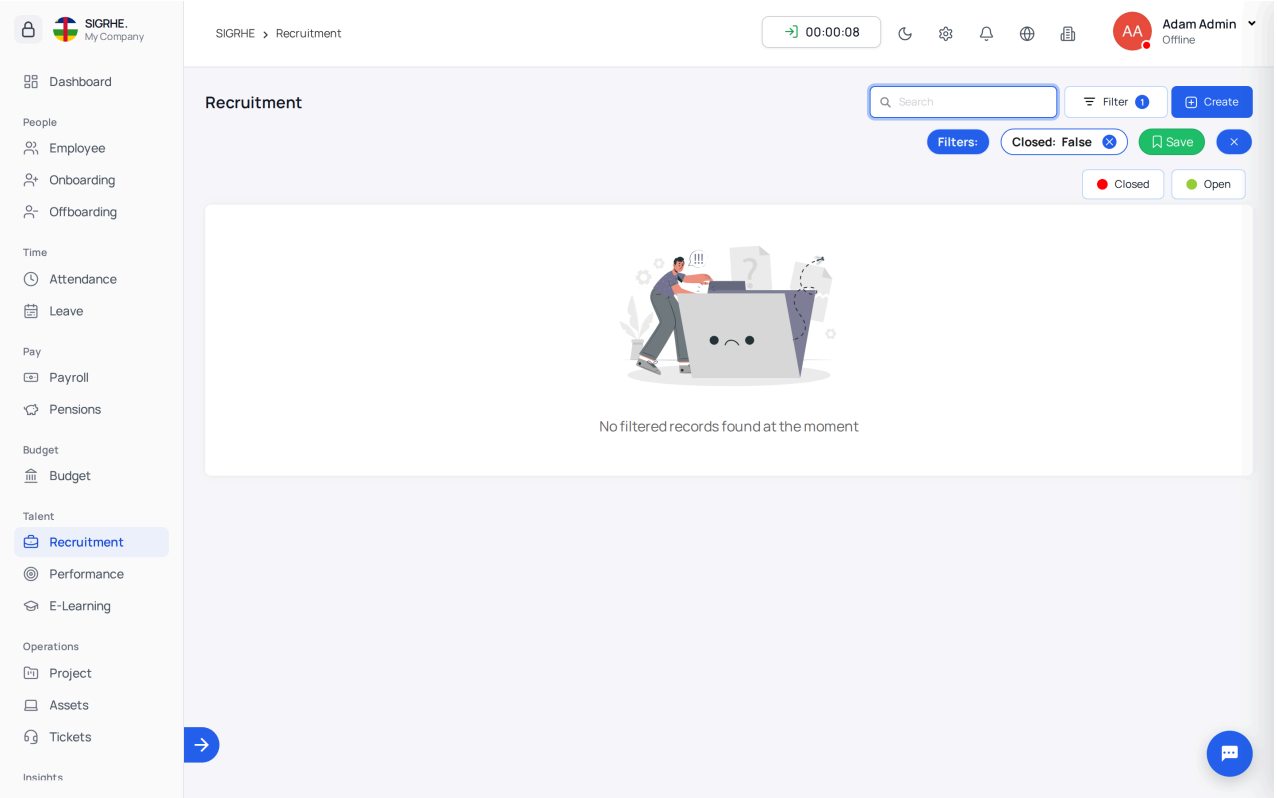
Last updated: 10/24/25, 2:58 PM

Next page

Introduction

Job Openings & Recruitment View

The Recruitment View allows administrators and managers to manage all active recruitments in the system. By navigating to the “Recruitment” tab within the recruitment interface (marked as 34), users can access a comprehensive list of all recruitments.



New Recruitment(Marked as 37): Users can create a new recruitment by clicking the “+ Create” button located at the top right corner of the interface (similiar to create recruitment from the pipeline). This allows for adding new recruitment drives directly from the recruitment overview page.

Search Bar(Marked as 35): Located at the top right of the recruitment list, it allows users to search for specific recruitments by name or keyword.

Filters(35): By default, a “Closed: false” filter is applied, which means only active (open) recruitments are shown. Users can add or remove filters to customize their view, helping to focus on specific recruitment statuses or criteria. Quick filters are available for easy sorting, with color-coded borders around list items for visual identification of the recruitment status (e.g., green for open, red for closed).

Recruitment List: The list displays essential details for each recruitment, including:

Recruitment Title: The title of the recruitment drive.

Managers: Number of managers involved in the recruitment.

Open Jobs: The number of job positions open under each recruitment.

Vacancy: The total number of available vacancies.

Total Hires: Displays the number of candidates hired out of the total number of candidates for that recruitment.

Start Date: The start date of the recruitment drive.

End Date: The end date of the recruitment drive.

Action Column:Users can perform various actions on each recruitment drive using the buttons in the action column:

- **Edit**: Modify the recruitment details.
  - **Duplicate**: Create a copy of the recruitment drive.
    - **Archive**: Move the recruitment to an archived status.
    - **Delete**: Permanently remove the recruitment drive.
    - **Share**: Generate a shareable link for the recruitment drive.

Last updated: 10/24/25, 2:58 PM

Previous page
Candidates

Next page
Stages

Resume Shortlisting

The task of shortlisting resumes can be a daunting process for HR professionals. With numerous applications flooding in for every job posting, identifying the best candidates quickly and efficiently is crucial. One of the most effective methods for streamlining this process is through skill-based keyword optimization. By focusing on specific skills, HRs can significantly reduce the time spent sifting through resumes and increase the accuracy of selecting the most qualified candidates.

Skill-based keywords are specific abilities or competencies that are critical to a particular job role. They often include technical skills, soft skills, certifications, and experience with particular tools or technologies. These keywords are derived from the job description and are essential for matching resumes to the job requirements.

Accessing Resume Shortlisting

1. In the recruitment pipeline, click on the three dots(Marked as 17) on the tab heads.
2. Select “Resume Shortlisting” from the dropdown menu (Marked as 18).

Adding Resumes

1. Click on the “+” button to add resumes(Marked as 19).
2. You can add multiple files at once

Automated Scoring

1. After adding the resumes, the system will automatically calculate the scores for each resume (Marked as 20).
2. The scoring is based on the number of skills present in each resume that match the required skills for the recruitment.
3. Resumes will be displayed in descending order of their scores.

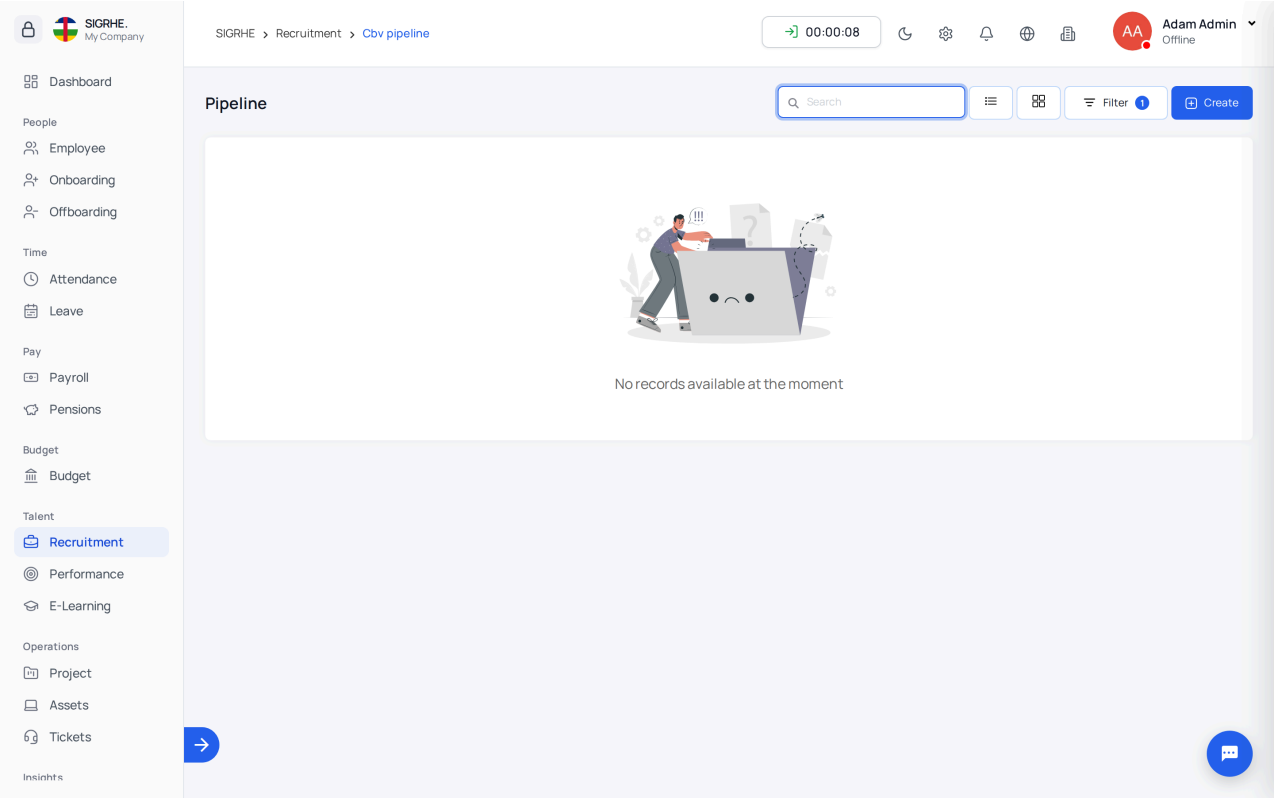
Creating Candidates

1. Click on the “Create Candidate” (Marked as 21) button to be redirected to the candidate creation form.
2. The form will be auto-filled with data extracted from the resume.

3. Verify the accuracy of the information in the fields by checking the preview of the resume on the right side.
4. Submit the form to create the candidate.
5. To create another candidate, return to the previous tab and click on the “Create Candidate” button again to repeat the process.

Important Note

- Some types of PDFs, such as image PDFs or scanned PDFs, cannot be read by the system. These resumes will be marked as “Need Verification” in the score column.



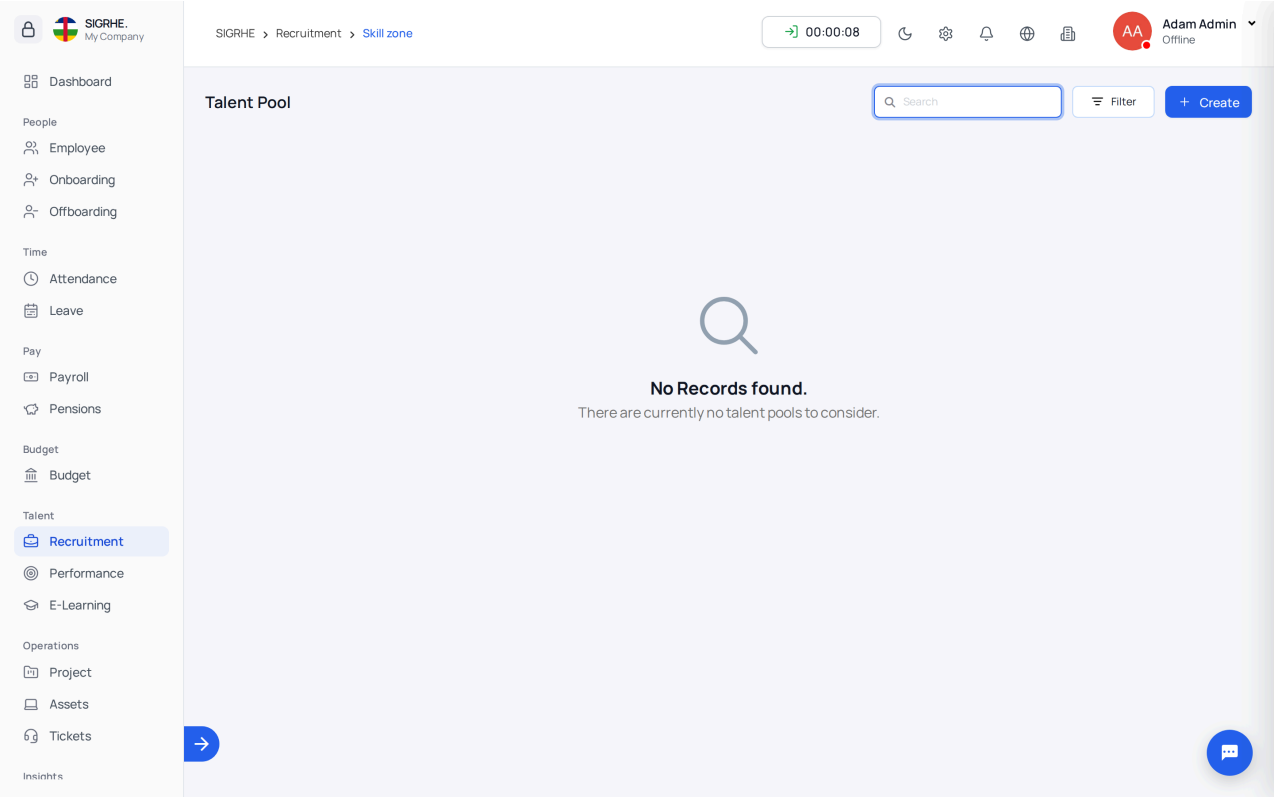
Last updated: 10/24/25, 2:58 PM

Previous page
Talent Pool (Skill Zone)

Next page
Candidate Portal (Self Tracking)

Talent Pool & Skill Zone

The Skill Zone feature is designed to streamline the recruitment process by categorizing candidates based on their skills and matching them to relevant job positions within the organization. This feature helps recruiters quickly identify candidates with the desired skill sets, improving the efficiency of the hiring process.

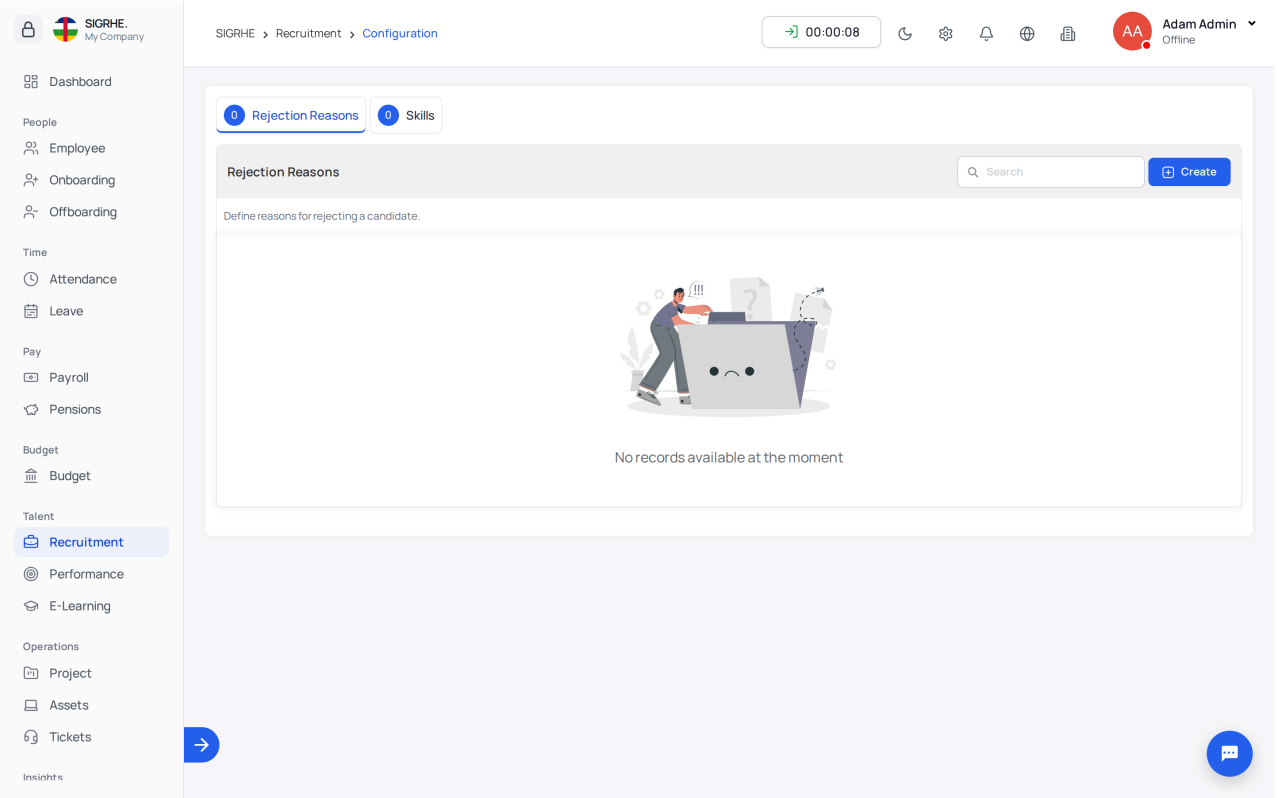


Last updated: 10/24/25, 2:58 PM

NKL-HR / HRMS / Stages

Stages

The Stages feature streamlines the hiring process by allowing users to manage the various stages of recruitment with ease to access On the left-hand side menu, under the "Recruitment" section, click on Stages (marked as 38). This will take you to the Stages management page.



Stages List

The stages are organized under different recruitment drives. For example, "Recruitment Drive" and "FutureForce Recruitment" are two drives shown in the screenshot. For each recruitment, the number of managers involved is displayed alongside the stages type, like "Initial" or "Hired".

Stage Actions (Marked as 42): Each stage has action icons to **edit** (pencil icon), **duplicate** (copy icon), or **delete** (trash bin icon) the stage. These actions are located under the "Actions" column.

Search (Marked as 39): The search bar allows you to quickly find specific stages or recruitment drives. Simply type the relevant keywords, and the results will filter accordingly.

Filter (Marked as 40): Use the filter option to narrow down the displayed stages based on specific criteria. This helps in managing a large number of stages efficiently.

Create (Marked as 41): To add a new stage, click on the **Create** button. This will open a form where you can define(Similiar to the stage creation from the recruitment pipline) the new stage's

details, including the title, managers involved, and type.

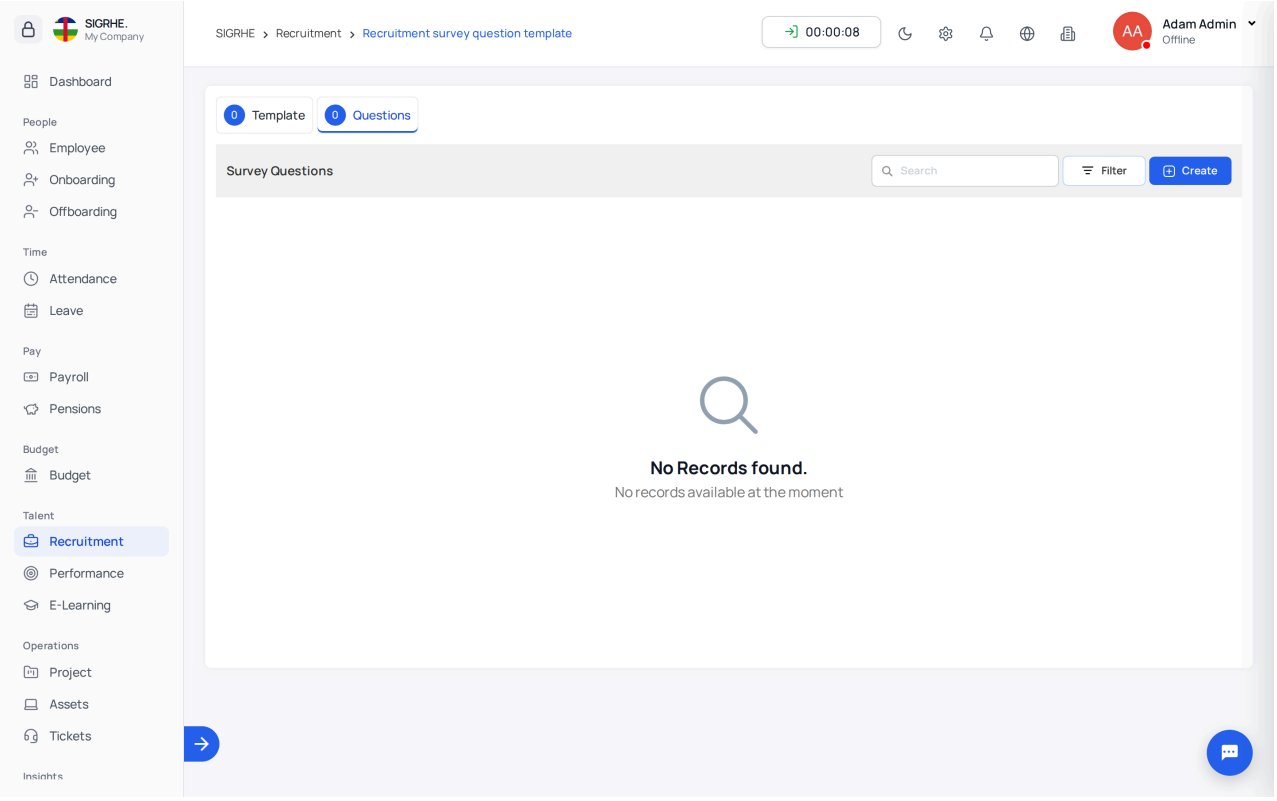
Last updated: 10/24/25, 2:58 PM

Previous page
Job Openings

Next page
Interviews

Recruitment Survey

It offers HR managers and recruiters a powerful tool to create custom questionnaires for applicants. This not only simplifies applications but also revolutionizes how we gather and understand crucial data. To access the Survey feature navigate. To access the featur navigate to recruitment survey section (Marked as 47).



Create Template(Template):

To add a new category, click on the **+ (Add)** button in the Templates section (marked as 48). This allows you to create a new template that can house related survey questions.

Creating New Survey Questions:

Within each template (category), you can add individual survey questions. Click on the **+ (Add)** button in the Questions section (marked as 50) to create a new question. Specify the question text and choose the appropriate type (e.g., number, text, multiple choice).Save the question to ensure it's available under the correct template.

Template: Template of the question(Optional)

Is Mandatory: Mention question is required or not

Recruitment: The question is asked in the applications for recruitment.

Question: The actual question

Sequence: Sequence where the questions ordered while displaying on the survey

Type: Type of the question like yes/no, choices, etc....

Open Jobs and Application Form

For convenient access to all open job positions, the system provides a straightforward. Lastly, the platform enables the sharing of open job opportunities with candidates or through various channels such as the company website and social media platforms, enhancing visibility and engagement in the recruitment process. To access the open jobs and application form feature(Marked as 51).

The open recruitment platform can be publicly accessed via the company website or social media platforms after sharing. Once shared, applicants can access the open jobs and follow. Click Apply Now (Marked as 51) or Details(Marked as 53) and apply Now (Marked as 54) button,

applicants can easily fill in their information and access the customized survey or questionnaire created for the recruitment process.

Once the application survey is completed the registration process also completes. The candidate will available at related recruitment initial stage and at the candidate directory

Last updated: 10/24/25, 2:58 PM

Previous page
Interviews

Next page
Talent Pool (Skill Zone)

Settings Admin Guide

Audience: HR and system administrators · **Area:** Settings (gear icon in top navigation) · **System:** NKL-HR

This guide details what every section and item in **Settings** does, who can access it, and the recommended sequence for system configuration.

1. Before You Start

Access Settings by clicking the **gear icon** in the top navigation bar. The left navigation pane lists all settings sections; click any section to open its items.

- **Search:** The search bar at the top of the Settings page locates any configuration parameter by name (for example, "Badge ID Prefix" or "Use TLS") and opens it directly.
- **Role-Based Visibility:** What you see depends on your assigned permissions. Sections and items outside your privileges are automatically hidden. Module-specific settings only display when their corresponding module is active.
- **Ministry / Company Scoping:** Many settings apply per ministry. Always verify your current active entity in the **company switcher** before modifying configuration values.

2. Settings at a Glance

SECTION	CONFIGURABLE ITEMS
General	System Preferences, Menu Access Restrictions, Roles and Permissions, Audit & History, Outlook Mail
Organization	Companies, Departments, Job Positions, Job Roles, Weekly Off Days
Email	Email Servers, Email Templates, Email Automations
Recruitment	Candidate Portal (Application Tracking, Rating Visibility)

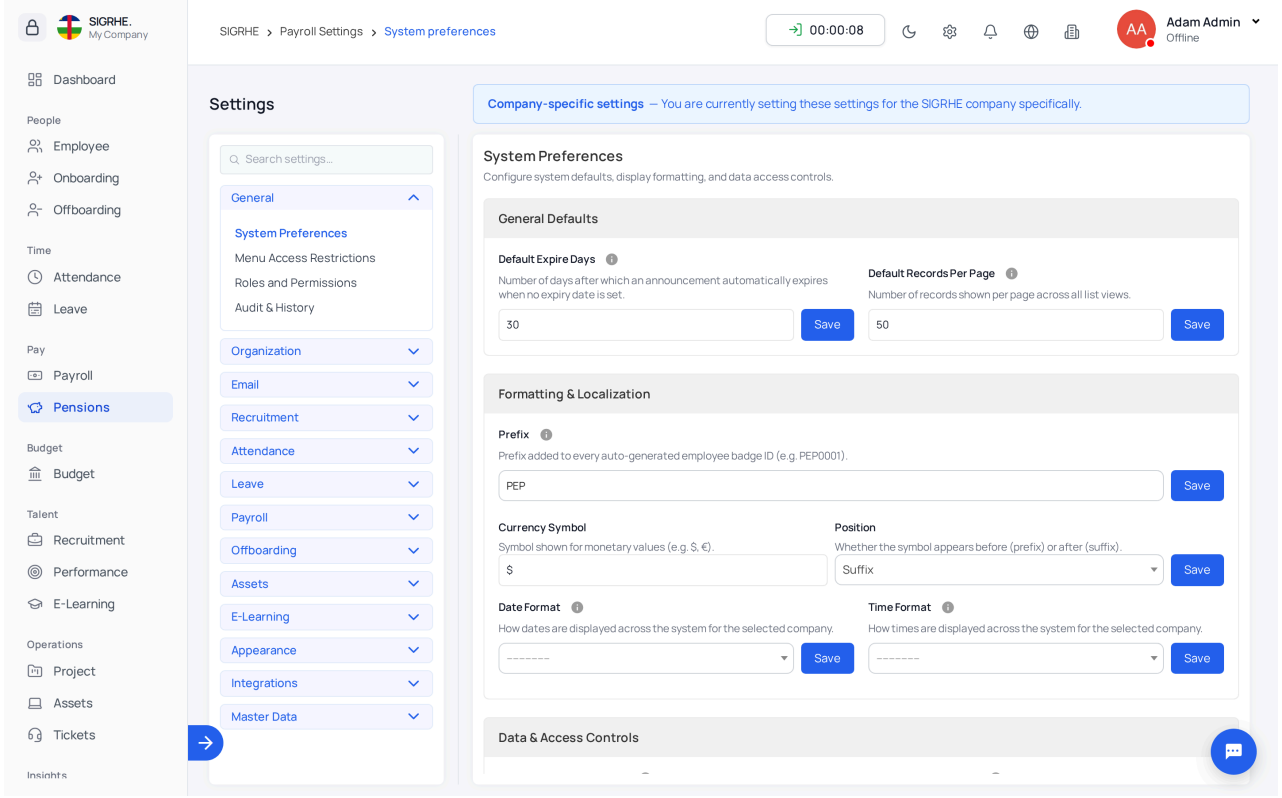
SECTION	CONFIGURABLE ITEMS
Attendance	Attendance Rules (Check In/Out, At-Work Tracker, Late/Early Tracking, IP Login Restriction, Biometrics, Face Detection, Geofencing)
Leave	Leave Rules (Compensatory Leave, Restrict Past Date Leave)
Payroll	Encashment Settings (Leave Unit Amount, Bonus Unit)
Offboarding	Offboarding Rules (Allow Resignation Request, Default Notice Period)
Assets	Asset Rule (Enable Asset Fine)
E-Learning	Course Categories, Certificate Templates
Appearance	Color Theme
Integrations	Google Drive Backup, LinkedIn, LDAP, Google Meet, WhatsApp
Master Data	Import Data, Import History
Product Tours	Manage Tours (active when product tours are enabled)

---

3. General

System Preferences

Navigation: `Settings › General › System Preferences`



SETTING	OPERATIONAL EFFECT
Default Expire Days	Number of days announcements remain active before expiring automatically, per ministry.
Default Records Per Page	Default number of table rows displayed per page across lists, per ministry.
Badge ID Prefix	Prefix applied to sequential employee badge IDs. With `EMP`, new personnel receive `EMP0001`, `EMP0002`... Up to 5 alphanumeric characters.
Currency Symbol	Currency symbol displayed across financial calculations (e.g., `$`, `€`, `FCFA`).
Currency Position	Determines whether the currency symbol appears before or after numerical values.
Date Format	System-wide date formatting standard (e.g., `YYYY-MM-DD`, `DD/MM/YYYY`).
Time Format	12-hour or 24-hour time display.
Restrict Login Account	Enables administrators to block or unblock employee user logins directly from employee profiles.
Restrict Profile Edit	Prevents standard employees from modifying their own core profile details after onboarding.
Work Information Tracking	Audits and logs historical changes to employees' work information attributes inside their profile History tab.

SETTING	OPERATIONAL EFFECT
Tracking Fields	Configures which specific work information fields are recorded in the history audit log.
Enable Languages	Selects which localized languages appear in the top navigation language switcher.

Menu Access Restrictions

Navigation: `Settings › General › Menu Access Restrictions`

Controls which users or roles can access specific menus and dashboard widgets beyond standard permissions (e.g., permitting non-admin department leads to view the employee directory or the birthday widget).

Roles and Permissions

Navigation: `Settings › General › Roles and Permissions` *(Superusers only)*

ITEM	PURPOSE
Roles	Standardized, reusable permission sets (e.g., *HR Officer*, *Payroll Clerk*, *Leave Approver*). Roles are assigned per ministry: permissions granted in one ministry do not grant rights in another.
Employee Permissions	Grants or revokes specific individual permissions for an employee. Best practice is to use Roles and reserve individual permissions for rare exceptions.

> **Multi-Company Scoping Note:** When **All my companies** is selected, a user possesses the combined permissions of their roles across each entity, but records are filtered strictly to authorized ministries.

Audit & History

Navigation: `Settings › General › Audit & History`

ITEM	PURPOSE
Audit Tags	Labels for categorizing audit log events (e.g., *Correction*, *Policy Update*, *Compliance Review*).
Audit Tracking / Tracked Models	Specifies which database models and records are tracked by the audit log.

Outlook Mail

Navigation: `Settings › General › Outlook Mail`

Connects a Microsoft 365 or Microsoft Outlook business mail account for sending system emails. When the Outlook add-on is configured, it replaces the generic **Email Servers** configuration.

---

4. Organization

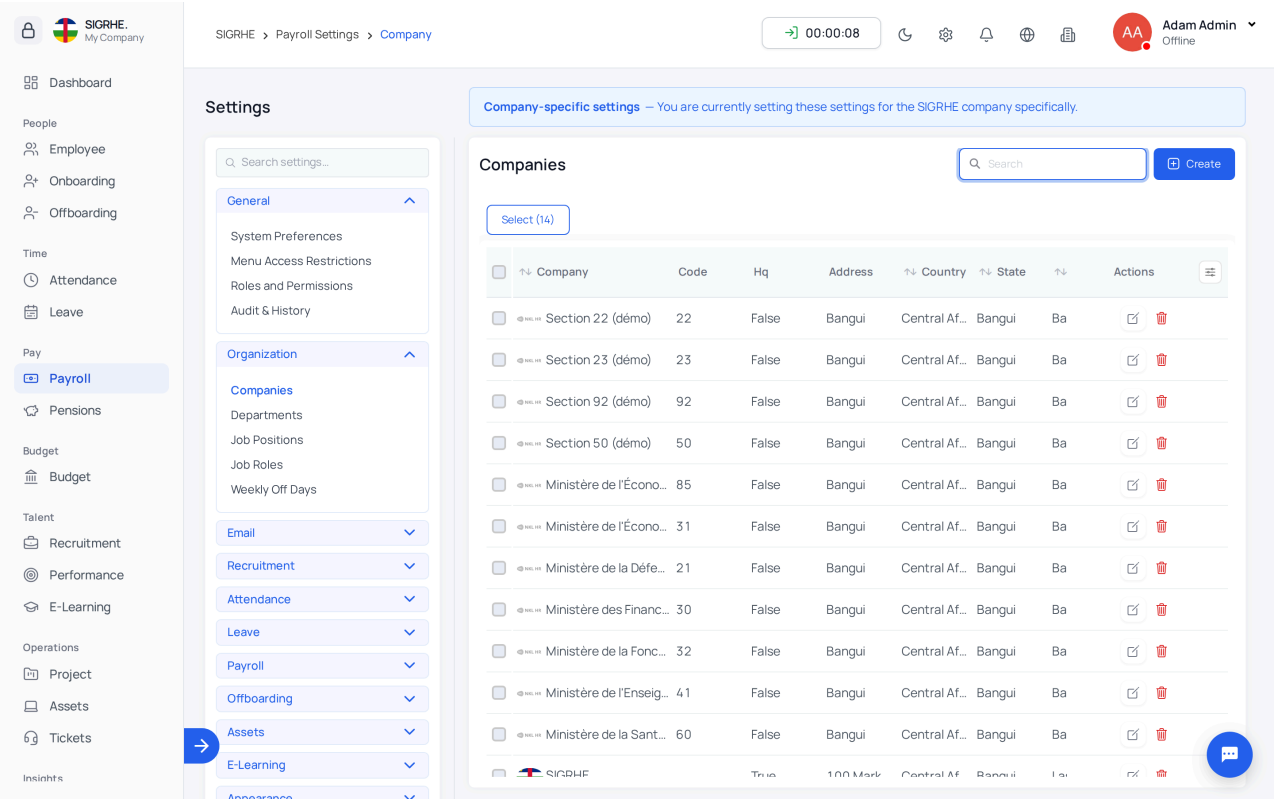
Configures the core organizational structure. Each level depends on the previous entity, so configure them in the following order:

```
Companies ──► Departments ──► Job Positions ──► Job Roles
    ├──► Weekly Off Days
    └──► Public Holidays (managed from Leave › Public Holidays)
```

> **Data Integrity Rule:** Master data records cannot be deleted once associated with active personnel or operational workflows. Rename or deactivate records rather than deleting them.

Companies (Ministries)

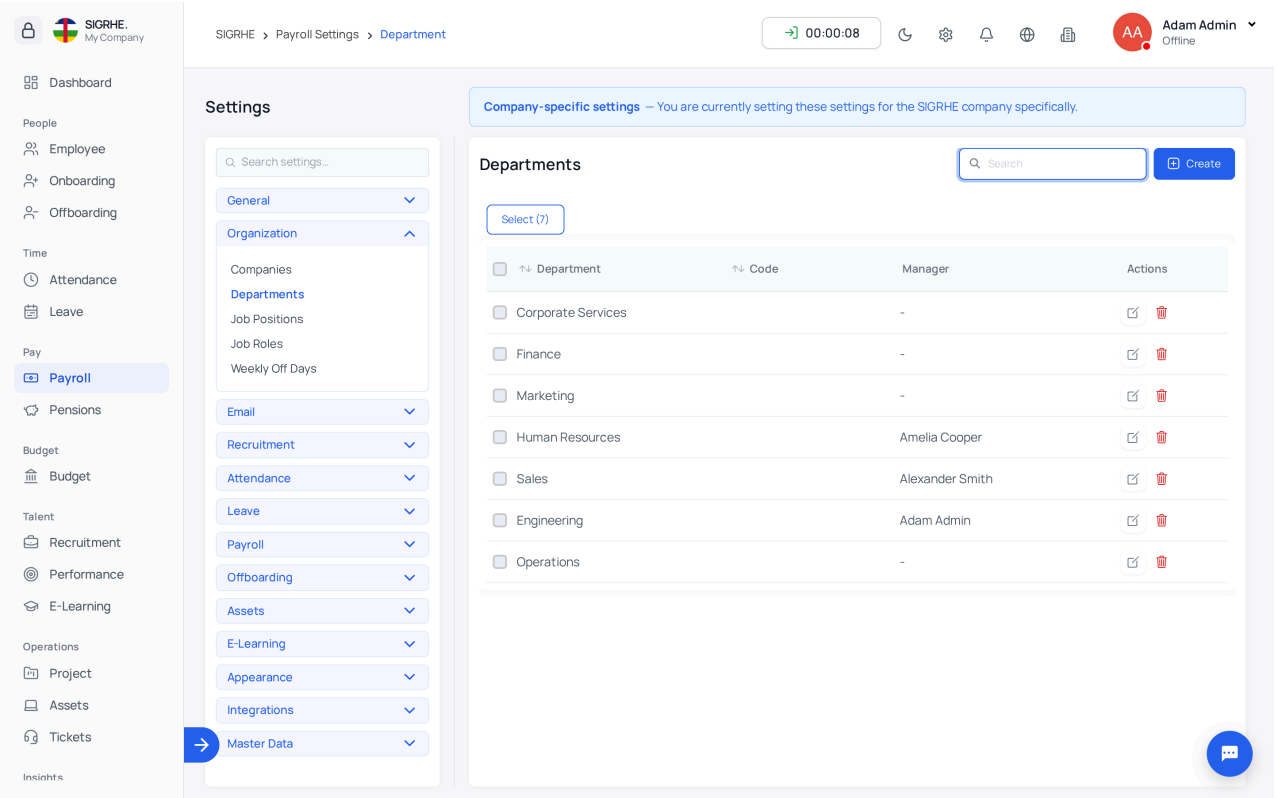
Navigation: `Settings › Organization › Companies`



- **Name:** Official ministry or corporate entity name. The combination of name and address must be unique.
- **Code:** Administrative identifier or budget section code (e.g., `30` for Finance).
- **Address, Country, State, City, Zip:** Postal and location details.
- **Logo:** Displayed in the company switcher, onboarding invitation emails, the onboarding portal, and e-learning completion certificates.

Departments

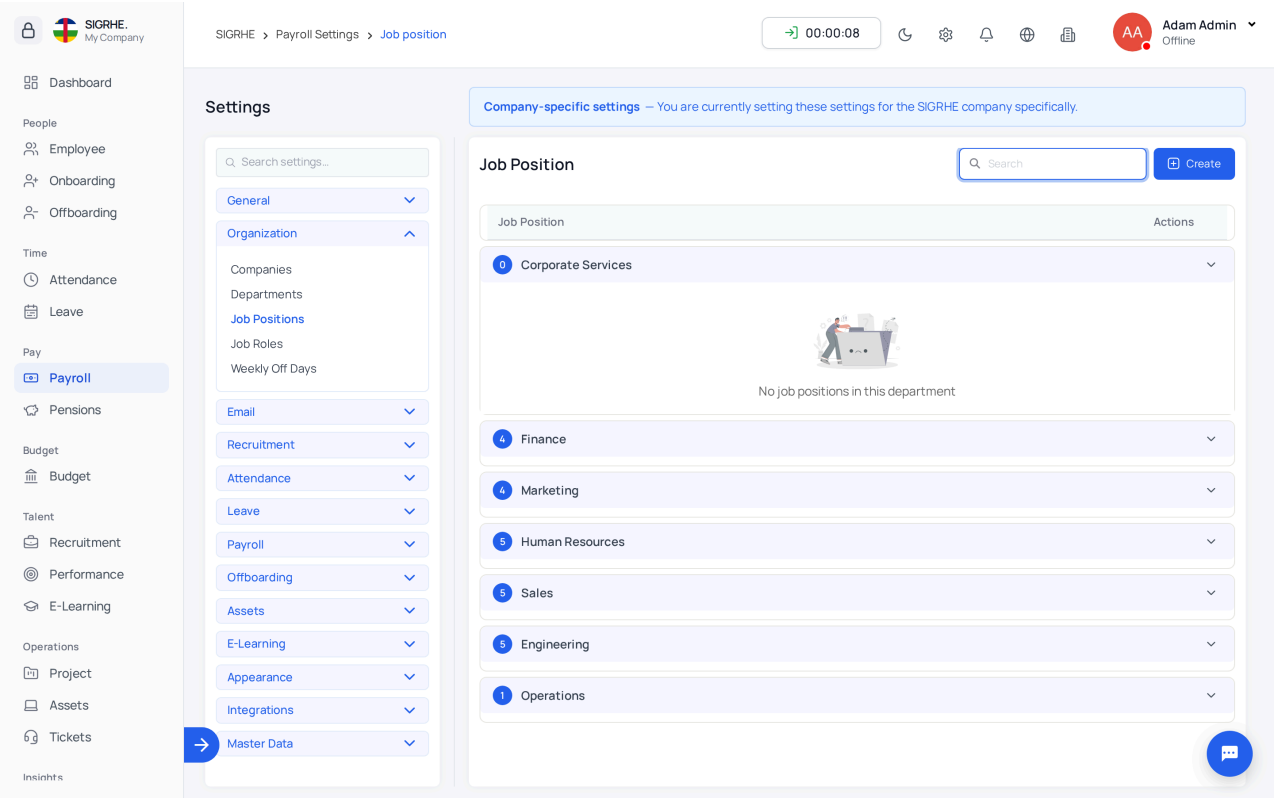
Navigation: `Settings › Organization › Departments`



- **Department:** Name of the department. Must be unique within the ministry.
- **Code:** Cost-centre or administrative imputation code (e.g., `120000`).
- **Company:** Assign to one or more ministries.
- *Note: A department containing assigned job positions cannot be deleted.*

Job Positions

Navigation: `Settings › Organization › Job Positions`



- **Job Position:** Title (e.g., *Financial Analyst*, *Senior Systems Engineer*).
- **Department:** Associated department (required).
- **Company:** Associated ministry or ministries.
- **Headcount:** Planned organizational capacity. Recruitment campaigns can only open vacancies up to the free capacity (`Headcount - Active Personnel - Open Vacancies`). Set to `0` for unlimited capacity.
- *Note: A job position containing assigned job roles cannot be deleted.*

Job Roles

Navigation: `Settings › Organization › Job Roles`

Specific functional specializations within a job position (e.g., *Lead Tax Auditor* within *Auditor*). Role titles must be unique within their job position.

Weekly Off Days

Navigation: `Settings › Organization › Weekly Off Days`

- **Based On Week:** Select **First Week** through **Fifth Week** of the month, or leave blank to apply to every week.
- **Based On Week Day:** Select day from **Monday** through **Sunday**.
- **Company:** Associated ministry or ministries.
- *Configuration Example:* For standard Saturday and Sunday rest days, add *Saturday* and *Sunday* with no week selected. For alternating weekend schedules (e.g., 2nd and 4th Saturday off), configure *Saturday, Second Week* and *Saturday, Fourth Week*.

Public Holidays

> **Important:** Statutory public holidays are configured and managed under `Leave › Public Holidays`, not in Settings. A holiday includes name, start and end dates, an optional yearly **Recurring** flag, and can be scoped to specific ministries, departments, positions, or the entire organization.

---

5. Email

Email Servers

Navigation: `Settings › Email › Email Servers`

Configures the outgoing SMTP mail server utilized for system communications (onboarding portal links, notification alerts, password resets, and bulk mailings). *Hidden when Outlook Mail is active.*

PARAMETER	DESCRIPTION
Email Host & Port	SMTP server address and port (e.g., `smtp.office365.com` on port `587`, or port `465`).
Email Host Username & Password	Authenticated credentials for the outbound mail account.
Default From Email	Standard sender email address for outgoing messages.
Display Name	Sender name displayed to email recipients.
Use Dynamic Display Name	Dynamically substitutes the sender display name with the name of the user triggering the action.
Use TLS / Use SSL	Transport encryption protocol. Typically TLS for port 587 or SSL for port 465 (never enable both).
Email Send Timeout	Connection timeout in seconds.
Fail Silently	Suppresses user-facing error messages on delivery failure. Disable during setup to diagnose connectivity issues.
Primary Mail Server	Designates the default active server when multiple email profiles are configured.

Email Templates

Navigation: `Settings › Email › Email Templates`

Reusable notification and letter layouts with dynamic placeholder tags (e.g., candidate name, job title, login URL). Utilized in bulk communications, onboarding email packs (rendered as downloadable PDFs), and automated triggers.

Email Automations

Navigation: `Settings › Email › Email Automations`

Triggers automated communications based on database record state transitions:

- **Automation Title:** Descriptive rule name.
- **Trigger Condition:** Executes **On Create**, **On Update**, or **On Delete** of designated record types, with optional conditional filters.
- **Delivery Channel:** Dispatches via **Email**, in-app **Notification**, or **Both**.
- **Recipients & Template:** Selects target recipients and the associated email template.

---

6. Recruitment

Candidate Portal

Navigation: `Settings › Recruitment › Candidate Portal`

- **Application Tracking:** Allows external applicants to track their progress through recruitment stages via a self-service portal.
- **Rating Visibility:** Determines whether interview scores and candidate ratings are exposed to applicants.

---

7. Attendance

Attendance Rules

Navigation: `Settings › Attendance › Attendance Rules`

RULE	OPERATIONAL EFFECT
Enable Check In / Check Out	Displays the clock-in/out interactive button across employee portals.
At-Work Tracker	Renders a live real-time elapsed workday counter inside the clock-in button.
Track Late Arrival & Early Departure	Automatically records tardiness and early departures against shift schedules.
IP Login Restriction	Restricts check-in capabilities strictly to whitelisted corporate IP addresses.
Biometric Attendance	Enables synchronization with on-premises biometric terminal hardware.
Face Detection	Requires facial recognition verification upon clock-in.
Geofencing	Restricts mobile attendance check-ins to authorized geographic coordinate radiuses.

> **Note on Shift Policies:** Shift grace periods, minimum working thresholds, and validation rules are configured under `Attendance › Time Policies`.

---

8. Leave

Leave Rules

Navigation: `Settings › Leave › Leave Rules`

- **Compensatory Leave:** Enables compensatory leave request workflows when personnel work on scheduled rest days or public holidays. Requires the Attendance module.
- **Restrict Past Date Leave:** Enforces that standard employees cannot submit retroactive leave requests for past dates; backdated entries are restricted to authorized administrators.

> **Note on Leave Setup:** Entitlement categories, carry-forward parameters, and multiple approval chains are managed under `Leave › Configuration`.

---

9. Payroll

Encashment Settings

Navigation: `Settings › Payroll › Encashment Settings`

- **Leave Unit Amount:** Monetary rate paid out per unit of unused leave encashed.
- **Bonus Unit:** Monetary valuation paid out per redeemed performance bonus point.

---

10. Offboarding

Offboarding Rules

Navigation: `Settings › Offboarding › Offboarding Rules`

- **Allow Resignation Request:** Enables self-service resignation letter submissions by employees and reveals the Resignation Letters management queue.
- **Default Notice Period:** Fallback duration (in calendar days) between resignation submission and the final working date, applied when an approval has no explicit end date and the employee has no contract-defined notice period.

---

11. Assets

Asset Rule

Navigation: `Settings › Assets › Asset Rule`

- **Enable Asset Fine:** Empowers HR administrators to levy a financial fine or deduction when physical equipment is returned damaged or incomplete.

---

12. E-Learning

Navigation: `Settings › E-Learning`

- **Course Categories:** Taxonomical classification to group courses in the public training catalog. Deleting a category keeps its associated courses uncategorized without data loss.
- **Certificate Templates:** Configures visual designs (*Classic*, *Modern*, *Elegant*, *Minimal*), border accents, typography, and up to two executive signatories for verifiable graduation certificates. One template can be designated as the ministry default. Use **Preview** to review rendered formatting. Leaving Heading and Body Text blank prints standard localized wording in each reader's system language.

---

13. Appearance

Color Theme

Navigation: `Settings › Appearance › Color Theme`

Selects application-wide visual color palettes across user interfaces. Theme selections apply globally across the organization.

---

14. Integrations

Navigation: `Settings › Integrations`

INTEGRATION	FUNCTIONAL CAPABILITY	REQUIRED CREDENTIALS
Google Drive Backup	Dispatches automated database snapshots and uploaded document backups to Google Drive.	Google Cloud OAuth client credentials JSON and Google Drive Folder ID
LinkedIn	Directly distributes published job vacancies to LinkedIn.	LinkedIn API Developer Token
LDAP	Enables single sign-on (SSO) and central directory account authentication.	LDAP Server URI (e.g., `ldap://127.0.0.1:389`), Bind DN, and Base DN
Google Meet	Automatically generates Google Meet video conference links for candidate interview schedules.	Google Cloud Project ID, OAuth Client ID & Secret, Authorized Redirect URIs

INTEGRATION	FUNCTIONAL CAPABILITY	REQUIRED CREDENTIALS
WhatsApp	Dispatches transactional notices and alerts via WhatsApp Business API.	Meta Developer Token, Business Account ID, Phone Number ID, Webhook Token

> **Security Note:** Each integration includes an **Enable** toggle switch. Keep credentials confidential; users with access to these screens can view and update connection secrets.

---

15. Master Data

Import Data

Navigation: `Settings › Master Data › Import Data`

Provides high-throughput spreadsheet ingestion with pre-validation, real-time error detection, and interactive on-screen correction before database commit.

SUPPORTED DATA ENTITY	INGESTED DATA CONTENTS	SUPPORTS UPDATING EXISTING RECORDS
Employees	Personal information, work attributes, contracts, and banking details	Yes
Leave Balances	Initial leave balance allocations per employee and leave type	Yes
Assets	Hardware asset inventory: category, batch, purchase cost, and warranty dates	Yes
Asset Allocation	Physical asset custody assignments to active personnel	Yes
Candidates	External applicant records for open recruitments	No

4-Step Ingestion Lifecycle

1. **Upload:**
   - Select target entity and download the official column template.
   - Choose ingestion mode:
     - **Create:** Ingests new records and ignores existing matches.
     - **Update:** Updates existing records matching designated keys.
     - **Both:** Modifies existing records and inserts new entries.

- Upload `.csv`, `.xlsx`, or `.xls` file (up to 10 MB).

2. **Map Columns:**
   - Automatically pairs spreadsheet header columns to system database fields (e.g., *Staff ID* to **Badge ID**). Review and adjust header pairings as necessary.
3. **Review & Correct:**
   - Rows containing validation discrepancies are listed alongside specific error reasons. Correct discrepancies directly on screen, or choose to skip invalid rows.
   - Displays an entity creation preview detailing any new companies, departments, or positions that the import will provision.
   - Option to download filtered spreadsheets of valid, error, or skipped rows.
4. **Import:**
   - Displays real-time progress. A completion summary confirms imported, unchanged, skipped, and failed record counts.
   - Discrepant rows are omitted from database ingestion; download the generated **Error File**, correct entries, and re-import. Ingestion is transactional: if a critical system crash occurs during processing, uncommitted batches roll back cleanly.

Updating Record Rules

- Select the unique identifier field used to locate existing records (for employees: **Badge ID**, **Email**, or **Phone**).
- **Blank Cell Preservation:** Blank spreadsheet cells leave existing database values untouched; only filled cells update records.
- The matching identifier field itself cannot be changed via update import.

Employee Spreadsheet Columns Reference

DATA CATEGORY	COLUMN HEADERS (BOLD = REQUIRED)
Personal	**Badge ID**, **First Name**, Last Name, Full Name, **Email**, **Phone**, Gender (Male, Female, Other), Address
Login	Username, Password *(If omitted, Email becomes username and a secure password is generated automatically)*
Work	Company, Department, Job Position, Job Role, Work Type, Shift, Employee Type, Reporting Manager, Location, Date Joining, Contract End Date
Compensation	Basic Salary, Salary Hour, CTC, Salary Structure
Banking	Bank Name, Account Number, Bank Branch, Bank Code 1 (IFSC, SWIFT, Routing), Bank Code 2, Bank Country, Bank State, Bank City, Bank Address

Date format requirement: `YYYY-MM-DD`. Password values are never exported in download files, and uploaded source spreadsheets are purged immediately upon processing completion.

Import History

Navigation: `Settings › Master Data › Import History`

Displays an audit log of the last 100 import operations detailing filename, data entity, executing administrator, timestamp, and final status:

- **Uploaded / Mapped:** Ingestion process paused or incomplete; click to resume column mapping.
- **Imported:** Completed successfully. Download the error file if partial rows were skipped.
- **Failed:** Import terminated with error; no database changes were committed.

---

16. Product Tours

Navigation: `Settings › Product Tours › Manage Tours`

Enables administrators to create structured, step-by-step interactive walkthroughs for end-users across different screens. Tours can be configured to launch automatically when an employee accesses a view for the first time. *Visible only when product tours are activated for the deployment.*

---

17. Recommended Setup Order

When configuring a new deployment or onboarding a new ministry, execute setup in this sequence:

1. **Organization Master Data (`Settings › Organization`):** Create Companies (Ministries), Departments, Job Positions, Job Roles, and Weekly Off Days.
2. **Public Holidays (`Leave › Public Holidays`):** Configure statutory holidays and annual recurring non-working days.
3. **General System Preferences (`Settings › General › System Preferences`):** Set Badge ID Prefix, currency conventions, date/time standards, and enabled languages.
4. **Email Configuration (`Settings › Email › Email Servers` or `Outlook Mail`):** Establish mail server connection and dispatch a test communication (e.g., password reset).
5. **Roles & Permissions (`Settings › General › Roles and Permissions`):** Configure standardized security roles and assign administrative personnel per ministry.
6. **Module Governance Rules:** Establish Attendance Rules, Leave Rules, Offboarding Rules, Encashment Settings, Asset Rule, and Candidate Portal preferences.
7. **Master Data Import (`Settings › Master Data › Import Data`):** Bulk import employee directories, followed by initial leave balances, physical asset registries, and candidate pools.
8. **E-Learning Setup (`Settings › E-Learning`):** Define course categories and establish the default completion certificate template.

---

18. Who Can Do What: Permission Matrix

SETTINGS ITEM	REQUIRED ACCESS PERMISSION
System Preferences	`View Company`, `Change Employee General Setting`, or `View History Tracking Fields`
Menu Access Restrictions	`View Permission`
Roles and Permissions	Superusers only
Audit & History	`View Audit Tag` or `View Audit Model Config`
Outlook Mail	`View Dynamic Email Configuration` (when Outlook add-on is active)
Companies / Departments / Positions / Roles	`View Company` / `View Department` / `View Job Position` / `View Job Role`
Weekly Off Days	`View Company Leaves`
Email Servers	`View Dynamic Email Configuration` (when Outlook add-on is inactive)
Email Templates	`View Mail Template`
Email Automations	`View Mail Automation`
Candidate Portal	`View Recruitment`
Attendance Rules	Permissions for attendance, biometric, geofencing, or face detection settings
Leave Rules	`Add Restrict Leave` or `View Attendance Validation Condition`
Encashment Settings	`Change Encashment General Settings`
Offboarding Rules	`Change Offboarding General Setting` or `Change Payroll General Setting`
Asset Rule	`View Asset General Setting` / `Change Asset General Setting`
Course Categories / Certificate Templates	`View Course Category` / `View Certificate Template`
Color Theme	`View Color Theme`

SETTINGS ITEM	REQUIRED ACCESS PERMISSION
Integrations (Drive, LinkedIn, LDAP, Meet, WhatsApp)	Designated integration permissions per service
Import Data / Import History	Superuser, or `Add Employee`, `Add Available Leave`, `Add Asset`, `Add Asset Assignment`
Manage Tours	`View Tour` (when product tours are active)

19. System Administrator CLI Operations

These maintenance and setup tasks are executed via the server command line by technical administrators:

COMMAND	OPERATIONAL PURPOSE
`python manage.py migrate`	Applies all database schema migrations across modules.
`python manage.py compilemessages`	Compiles language translation catalogs.
`python manage.py seed_pension_pack car`	Loads statutory Central African Republic (CAR) pension regulatory tables without overwriting custom modifications.
`python manage.py import_pension_data <kind> <file> [--commit] [--skip-errors]`	Command-line execution of pension data migration batches for members, service periods, contributions, and beneficiaries.
`python manage.py elearning_resync_progress`	Recalculates learner progress percentages across active enrolments.
`python manage.py seed_elearning_demo`	Provisions sample e-learning demonstration courses, categories, and quizzes (`--reset` to rebuild or `--remove` to purge).

Previous page
Pensions

Next page
Permissions & Administration

NKL-HR Documentation

What is NKL-HR?

NKL-HR is a comprehensive Human Resource Management System (HRMS) designed to meet the operational and administrative needs of organizations and ministries.

Core HRMS Modules

NKL-HR provides a dedicated suite of HRMS modules:

Recruitment

Manage candidate sourcing, resume shortlisting, interview stages, and hiring pipelines.

Onboarding

Transition hired candidates through stage checklists and digital onboarding portals.

Employee Management

Manage employee records, requests, work schedules, policies, and formal discipline.

Payroll

Process compensation structures, allowances, deductions, payslips, and tax rules.

Attendance Management

Track check-ins, automatic validation, overtime approvals, late arrivals, and the monthly summary.

Leave Management

Administer leave types, balance ledgers, requests, approvals, and restricted periods.

Performance

Evaluate employee performance, feedback reviews, and organizational objectives.

Offboarding

Process resignation letters, manage exit workflows, and safely archive departing employees.

E-Learning

Create courses and quizzes, assign curricula, monitor learner progress, and issue certificates.

Pension Management

Manage contributions, declarations, retirement forecasting, pension files, and payment runs.

Last updated: 5/4/26, 4:16 PM

Next page
Introduction

NKL-HR Documentation

What is NKL-HR?

NKL-HR is an enterprise Human Resource Management System (HRMS) designed to meet the operational and administrative needs of organizations and ministries. It enables administrators and HR teams to manage workforce operations within a single, cohesive environment.

Core HRMS Modules

NKL-HR connects organizational workforce administration workflows into one centralized workspace, eliminating data fragmentation across departments.

HRMS Modules

- **Recruitment:** Manage the complete hiring pipeline, from candidate sourcing and resume screening to interview management and candidate selection.
- **Onboarding:** Manage hired candidates, distribute self-service onboarding portals, customize stage pipelines, and track departmental onboarding task completion.
- **Employee Management:** Centralize employee profiles, personal and bank details, work assignments, rotating schedules, policy publication, and disciplinary actions.
- **Payroll:** Automate salary computations, allowances, deductions, payslips, advance salary loans, reimbursements, and tax compliance.
- **Attendance Management:** Monitor check-in/out records, biometric synchronization, automated validation rules, overtime approval workflows, and monthly reconciliations.
- **Leave Management:** Configure paid and unpaid leave entitlements, eligibility rules, automated resets, multi-level approval hierarchies, and restricted leave periods.
- **Performance:** Monitor employee goals, 360 feedback reviews, performance evaluations, and developmental feedback.
- **Offboarding:** Process employee resignations, orchestrate exit stages and handover checklists, enforce notice periods, and handle automated account archiving.
- **E-Learning:** Create multimedia training courses, conduct assessments and quizzes, track enrollment progress, and issue verifiable digital certificates.

- **Pension Management:** Administer pension funds, statutory contributions, regulatory declarations, retirement projections, claim processing, and payment disbursements (Pensions module).
- **Settings & Master Data:** Administer system preferences, multi-ministry organizational structures, security roles and permissions, mail automations, integrations, and bulk spreadsheet data ingestion.

Key Capabilities

- **Flexible Views:** Switch between list, tabular, and card views across modules.
- **Dynamic Scoping:** Multi-entity switcher allows instant filtering and record scoping by ministry or company.
- **Bulk Operations:** Execute bulk updates, data imports, spreadsheet exports, password resets, and targeted communications.
- **Granular Role-Based Access:** Fine-grained permission assignments per module protect sensitive organizational data.

Last updated: 11/14/25, 5:24 PM

Next page
Introduction