Human Incubator
ISO 9001 and ISO 27001 Certified

MANILA OFFICE
Unit 1103 Jollibee Center,
San Miguel Avenue, Ortigas Center,
San Antonio, Pasig, 1605
Metro Manila, Philippines
+63-28-292-6978 or 09176280355

CEBU OFFICE
Unit 1003A 10/F Keppel Center
Samar Loop cor.Cardinal Ave.,
Cebu Business Park,
Cebu City, 6000 Philippines
09176240208 or 09171137633

hiisales@human-incubator.com

EasyHR User Manual

Author: Butch Canada

Version: 2023.11.29

Table of Contents

Section I: Introduction **5**
- Overview 5
- Purpose of this User Manual 5
- Who should use this manual 7
- Best Practices 7

Section II: Getting Started **11**
- Introduction 11
- How to Access EasyHR System 11

Section III: Dashboard **13**
- Dashboard Page 13

Section IV: Set Up **14**
- Company Setup 14
- Overview 14
  - Company List 14
  - Company Detail 15
  - Approver 16
  - Settings 17
  - Announcement 18
- Employee Setup 20
- Mandatory Tables 30
- Shift 34
- Year 37
- Other Income 41
- Other Deductions 43
- Users 45

Section V: DTR **56**
- Change Shift 56

Leave Application 63
Overtime Application 68
DTR 73
Section VI: Payroll 84
Loan 84
Other Income 88
Other Deductions 93
Payroll 98
Section VII: Reports 114
Mandatory Reports 114
Demographics 116
Payroll Worksheet Range 118
Payroll Summary Worksheet Report 120
Payroll Other Income Report 121
Payroll Other Deduction Report 122
Payroll Summary 124
Journal Voucher 125
Withholding Tax Monthly 126
ATM Bank Report 129
DTR Report 131
Bank Detail Report 132
Payslip Report 133
Payroll Other Income Payslip 134
SSS Loan 135
SSS Calamity Loan 136
Loan Summary Report 138
Loan Deduction Report 139
HDMF Loan Report 140
Leave Reports 143
Tardiness Report 144
Absent Report 145
13th Month Pay Report 146
Official Business Report 147
Training/Seminar 148
Geolocation Official Business Report 149
Geolocation Report 150
DTR Image Report 151

Section VIII: Portal **153**
Employee Portal 153
Section IX: Settings **170**
System Tables 170
Employee History 175
System Integration 176
Section X: Logout **178**
Logout 178

Section I: Introduction

Overview

- EasyHR is a cloud-based payroll software solution that provides automated features for handling essential payroll tasks, including the calculation and automation of statutory payroll deductions such as BIR, HDMF, SSS, and Philhealth. It also streamlines the computation of DTR (Daily Time Record) for tardiness, absences, undertime, overtime, holidays, and various leave types, simplifying manual and repetitive tasks such as report preparation for the BIR, HDMF, SSS, and PhilHealth.

Purpose of this User Manual

- The EasyHr user manual is designed with the primary objective of delivering clear and comprehensive guidance to users on the effective and safe utilization of the product, system, or service.

  Our core aim in creating this user manual is to furnish users with detailed, step-by-step instructions pertaining to the operation, assembly, installation, and utilization of the product or system. This equips users with the knowledge necessary to optimize the utilization of the product's features and functionalities.

  Moreover, this manual functions as a readily accessible reference document, allowing users to swiftly access information concerning specific functions, settings, or maintenance procedures.

  This user manual offers a meticulously structured and easily understandable guide, effectively augmenting the user experience and increasing the probability that users will proficiently engage with the product or service, ultimately resulting in heightened user satisfaction.

Who should use this manual

- Primary users within the EasyHR system are typically employees or staff members of an organization. These individuals consult the EasyHR user manual to access guidance, information, and instructions pertaining to HR-related policies, procedures, and practices.

- The EasyHR user manual functions as an all-encompassing reference resource for anyone within the organization seeking to gain insights, implement, or adhere to HR-related policies and procedures. Its purpose is to promote consistency, transparency, and alignment of HR practices with the organization's overarching goals and values.

Best Practices

By following these best practices, an organization can streamline its HR processes, enhance employee engagement, and better manage its workforce, leading to improved productivity and compliance.

Setting up the master files

- EasyHR offers two master files setup features: one for manual adding and another for bulk uploads. Master files on EasyHR include: **Employee, Users, DTR** and **Payroll.** Keep the following guidelines in mind to ensure successful entry when setting up the master file(s):

Employee

- Among the employee detail fields listed below, we've set a validation to prevent the use of special characters, with the only exceptions of(- ‘Ññ'.).
    - Select Position
    - Select Payroll Group
    - Contact Tel No.
    - Contact Mobile No.
    - Address
    - Select City

    - Select Date of Birth
    - Select Religion
    - Select Zip Code
    - Place of Birth
    - Select Civil Status
    - Select Sex
    - Select Citizenship
    - Height
    - Weight
    - Blood Type
- These are the special characters that were restricted: **~ ` ! @ # $ % ^ & * ( ) _ + = { } [ ] | \ / : ; " < > , ? À Á Â Ã Ä Å Æ Ç È É Ê Ë Ì Í Î Ï Ð Ò Ó Ô Õ Ö × Ø Ù Ú Û Ü Ý Þ ß**:
- Please ensure the avoidance of duplicate **ID Number**, as they must be unique to prevent any errors when users upload employee master files.
- Please ensure the avoidance of duplicate **Biometric ID Number**, as they must be unique to prevent any errors when users upload employee master files.
- Make sure all fields in the master file have a value or data to prevent any errors when uploading the employee master file.

Users

- The users uploading the master file should be unique and all fields should have a value to prevent any errors when uploading the Users credentials master file.
    - Username
    - Passwords *Note: Must contain uppercase, lowercase, number and special character. Special characters such as [<>?/:;'{}|\-_=+()] are NOT allowed.*
    - FullName
    - Employee ID number *Note: Must be the same ID number as the employee.*

DTR

- The users uploading the master file should follow the template of the system to prevent any errors when uploading the DTR master file.
- Essential fields must contain valid values for importing DTR.

- Employee ID
- Employee Name *Note: Same as Employee ID*
- Att_Time *Note: The format should be '9/16/2023 8:00:14 AM*

Payroll

- The users uploading the master file should follow the template of the system to prevent any errors when uploading the Payroll master file.
- Essential fields must contain valid values for importing DTR.
  - Employee ID
  - Employee Name
  - Regular Working Day

Internet Connection

- To ensure a smooth experience with EasyHR and to avoid unexpected issues when uploading new master files or updating existing ones, it's important to have reliable internet connection. Here are some best practices to consider:
  - **Use a Secure Network:** Connect to a secure and trusted Wi-Fi network or wired connection.
  - **Minimum Upload Speed:** For efficient uploading of new master files and updates, your internet connection should have a minimum speed of at least 25 Mbps.

Device Shutdown

- To maintain the condition of your device and ensure consistent access to the EasyFS cloud system, it's essential to follow these best practices for proper device shutdown:
  - **Regular Device Shutdown**: Shut down your computer or mobile devices regularly to prevent overheating and extend hardware lifespan.
  - **Graceful Closure**: Before shutting down your computer, ensure all applications, including EasyFS, are closed properly. Saving any unsaved work is essential.
  - **Close EasyFS**: Specifically, close EasyFS and log out of your EasyFS account before shutting down your device. This

ensures that any ongoing tasks are saved and that EasyFS is in a stable state.

- **Update Software**: Keep your device's operating system and EasyFS software up to date. Updates often include bug fixes and security enhancements that can prevent hardware-related issues.
- **Battery Maintenance**: If you're using a laptop or mobile device, manage your device's battery health by following the manufacturer's recommendations for charging and discharging cycles.
- **Uninterruptible Power Supply (UPS):** If possible, use a UPS to provide backup power during brief outages, ensuring that your device has enough time to shut down gracefully.

Section II: Getting Started

Introduction

The EasyHR system is a powerful and comprehensive software solution that has been implemented to enhance and simplify the management of human resources within our organization. Designed to meet the evolving needs of modern businesses, our EasyHR system is a vital component of our strategic approach to workforce management. It facilitates the efficient and effective handling of various HR functions, ensuring a more organized, compliant, and productive work environment.

How to Access EasyHR System

Logging In

- **Open your web browser**: Launch your preferred web browser. We recommend using the latest version of popular web browsers like **Google Chrome, Mozilla Firefox, Safari,** or **Microsoft Edge**.
- **Visit the system's web address**: In the address bar of your web browser, enter the URL for EasyHR. The web address may look like"https://demo.easycloudhr.com/security/login".
- **Enter your credentials**: You will be redirected to the login page. Here, enter your username and password. Make sure to use the correct credentials associated with your EasyHR account. If you have no account yet, better inform the system's Administrator to

- **Click “Login”**: Once you’ve done entering your credentials, click the **Login** button.

Forgot Password

- If you've forgotten your password, no need to worry. Simply click the "Forgot Password" link on the login page. You'll receive instructions on how to reset your password via your registered email address.

  Note: You are required to provide your username in the event that you select the "forgot password" option.

Section III: Dashboard

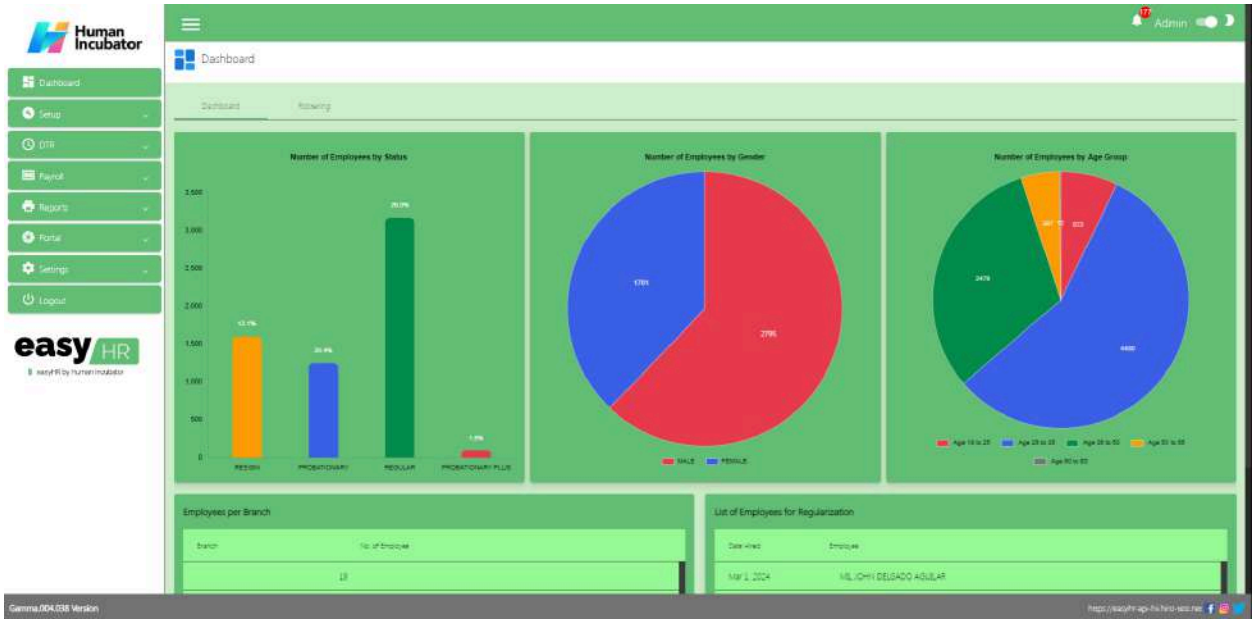
Dashboard Page

- Once login is successful, the user will be redirected to this page.
- **Module** - shows all features that users can use in the system.
- **Dashboard** - shows the employees summary (Number of Employees by Status, by Gender, by Age Group, Employees per Branch and List of Employee for Regularization) .

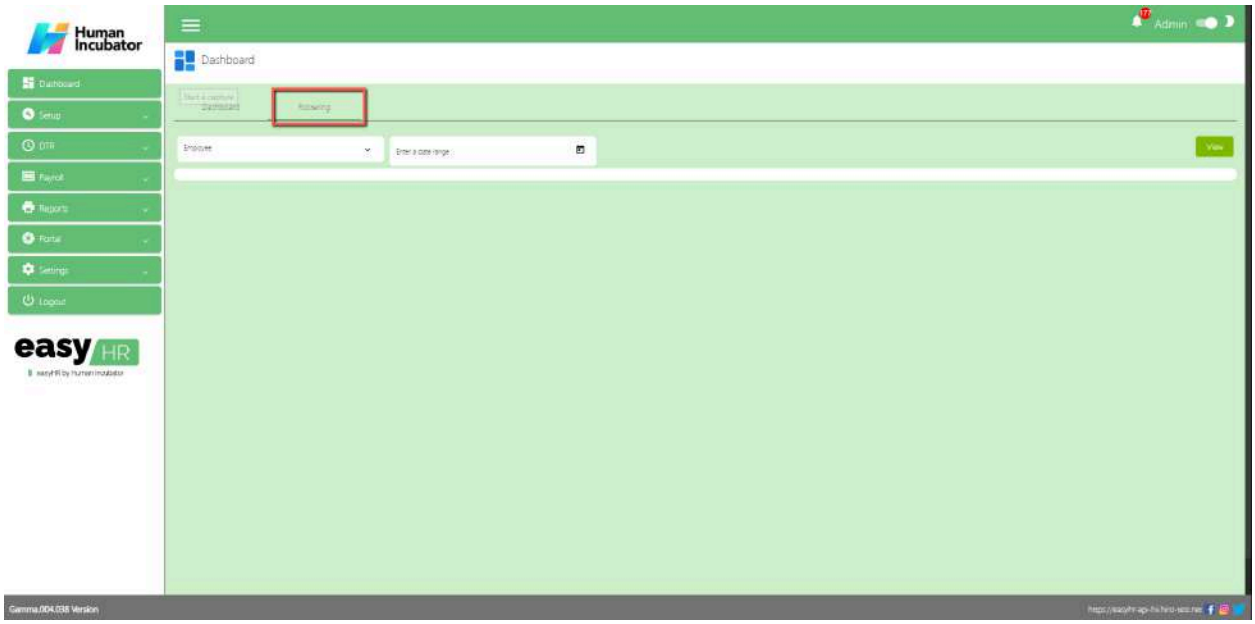
Rostering Tab

Steps:

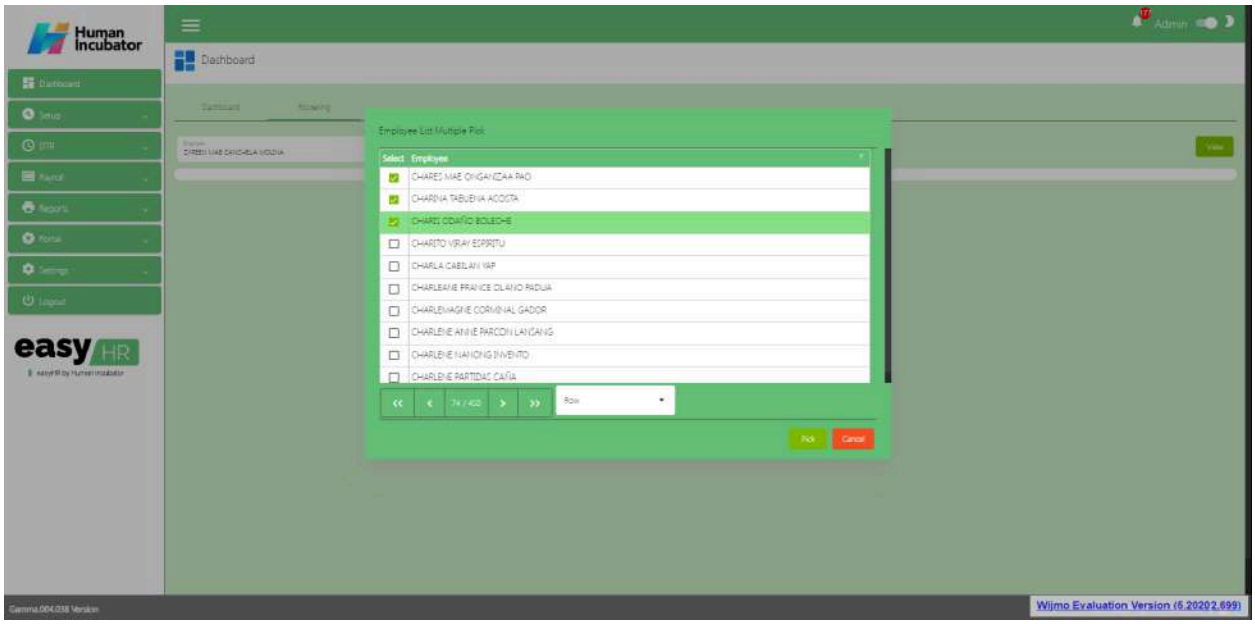
1. Go to Dashboard



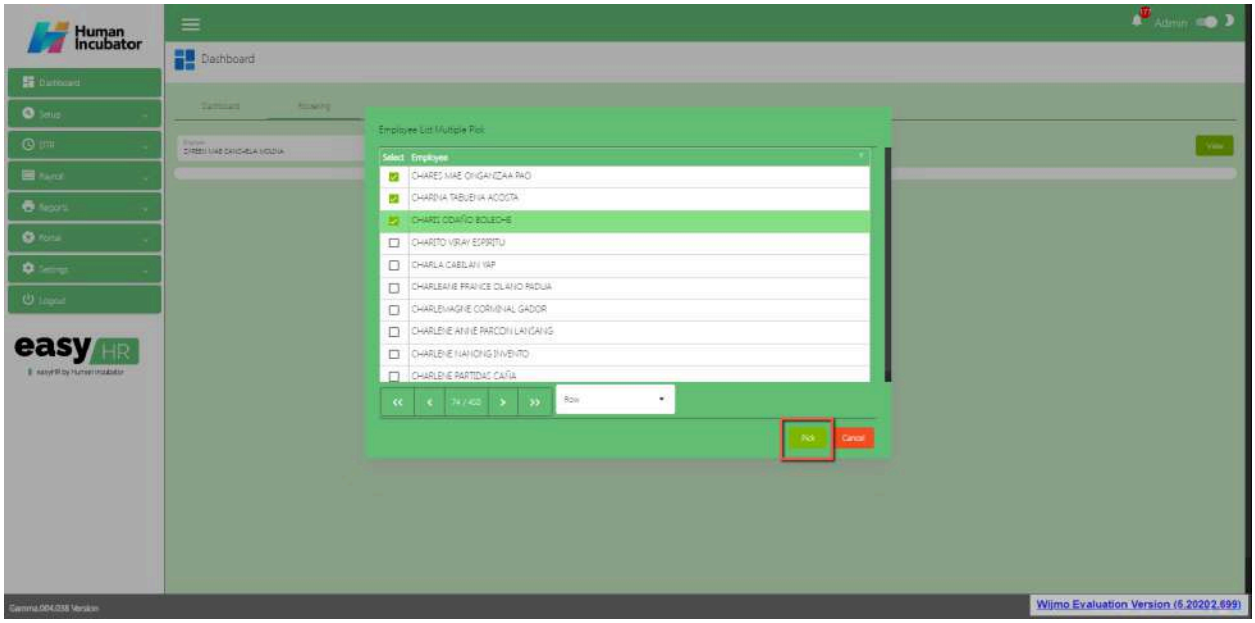
2. Go to the Rostering Tab



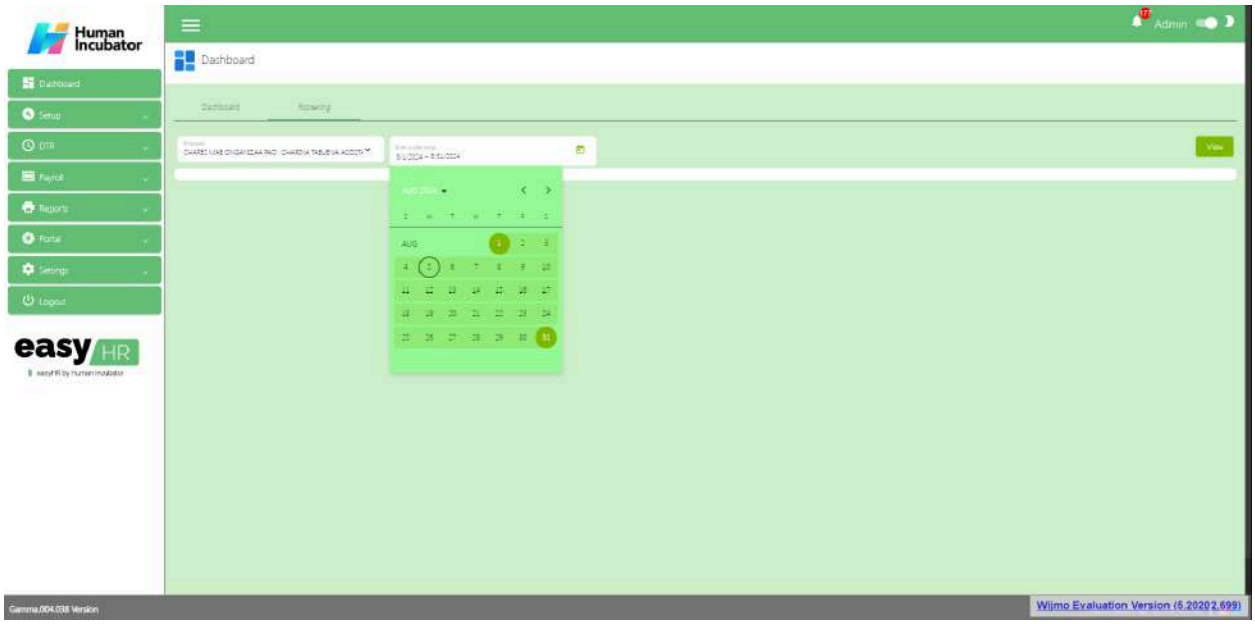
3. Click Checkbox to select one or multiple Employee



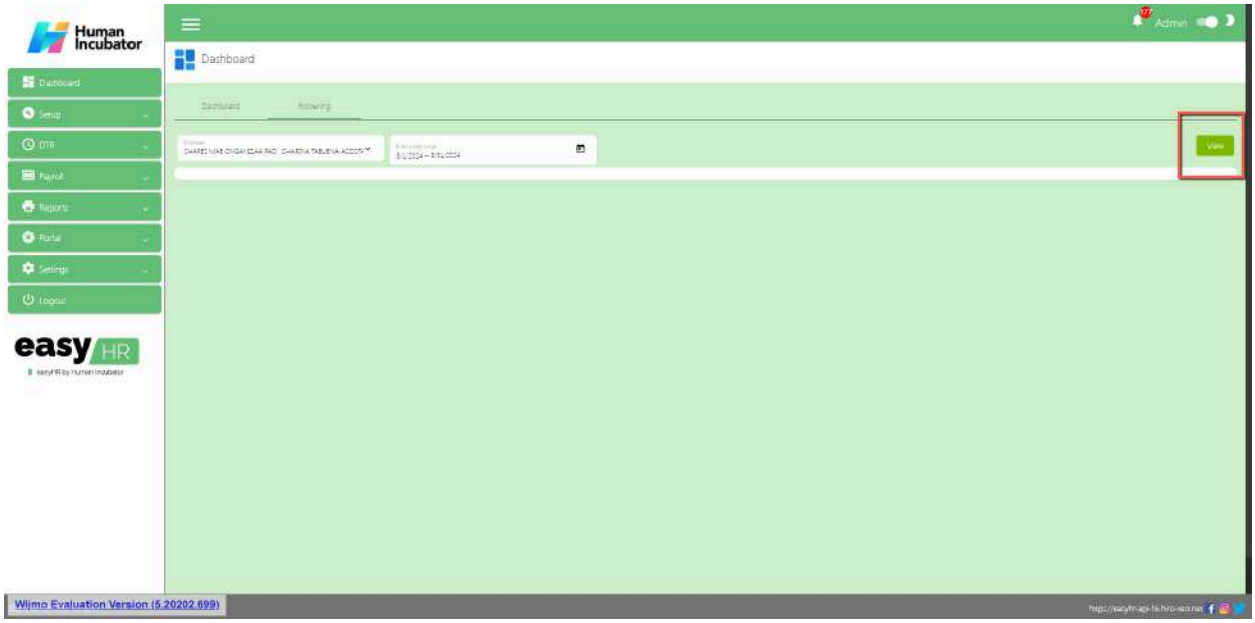
4. Click Pick



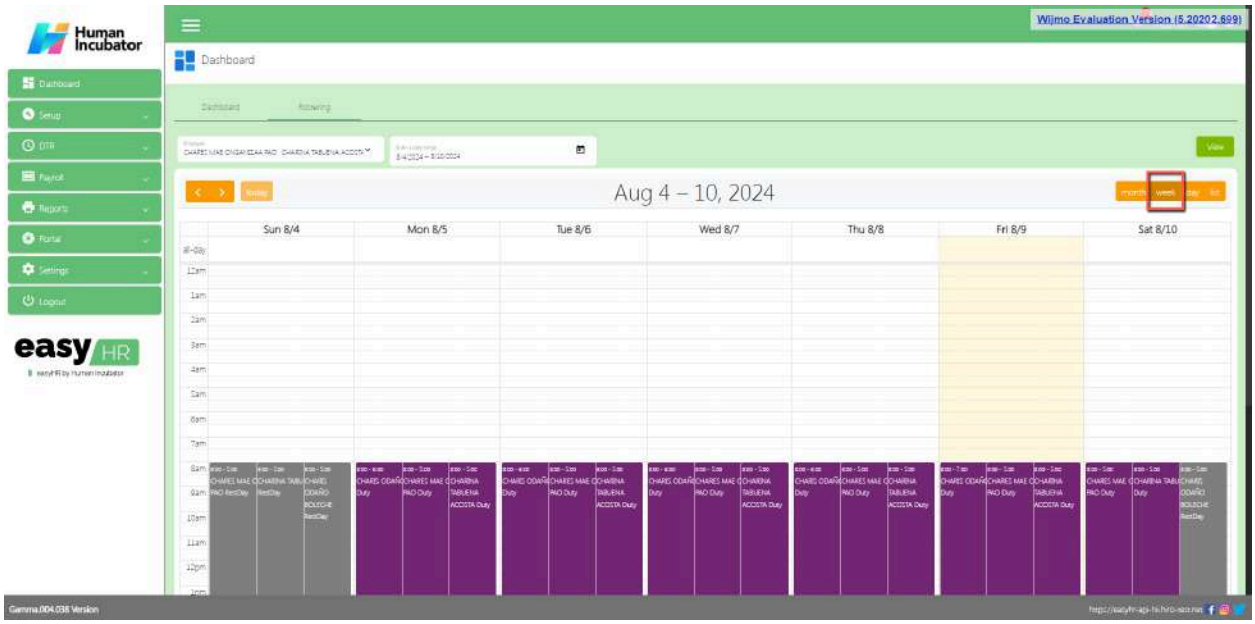
5. Select Date Range



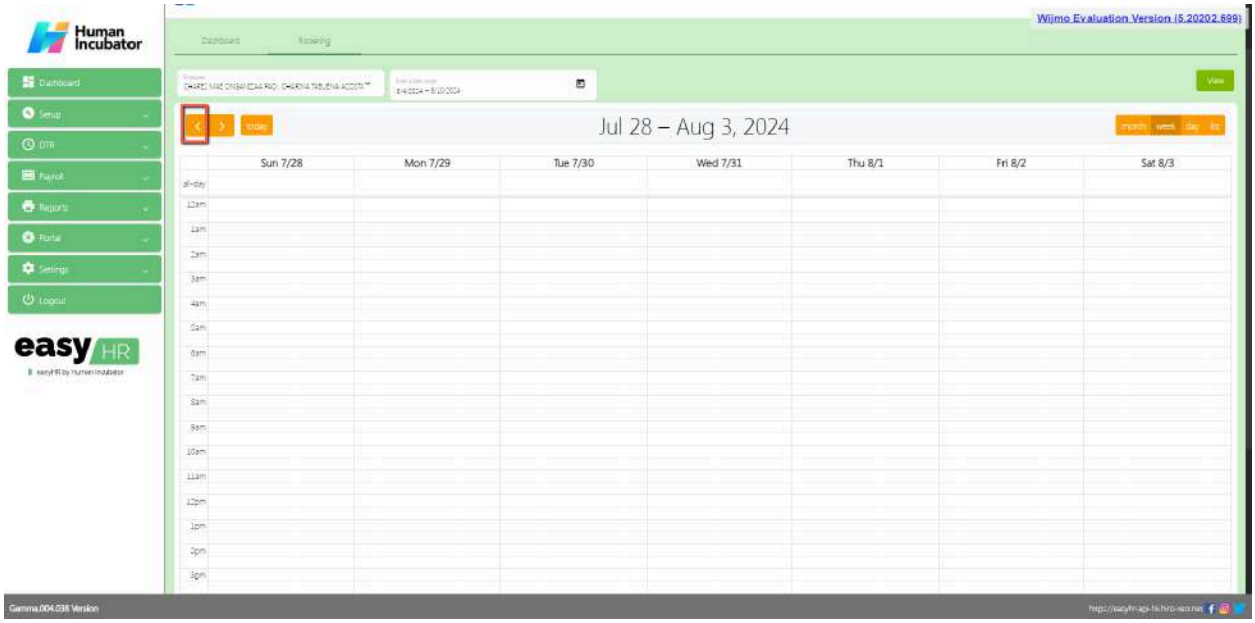
6. Click View



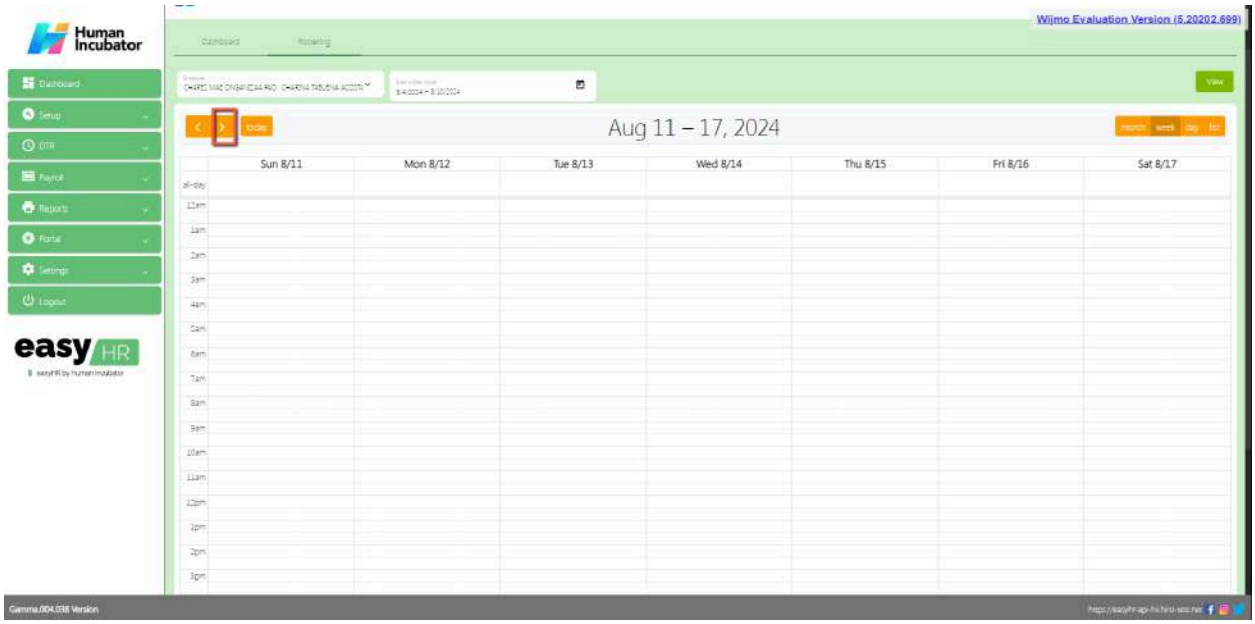
7. Week View



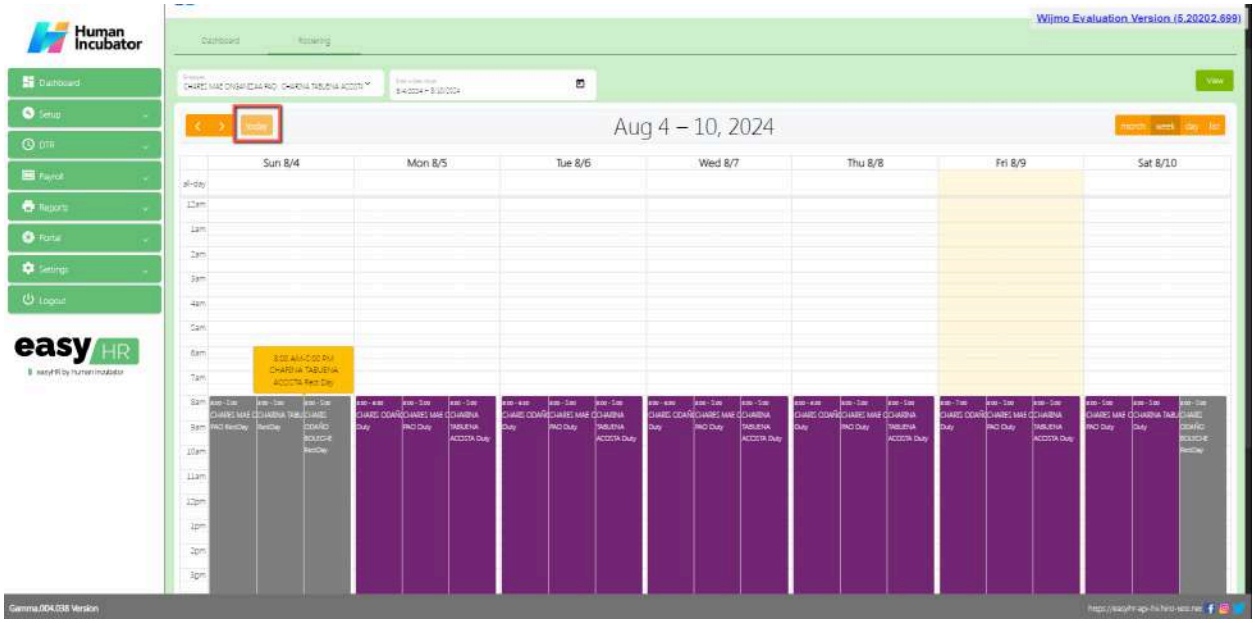
8. Click this arrow to view previous week



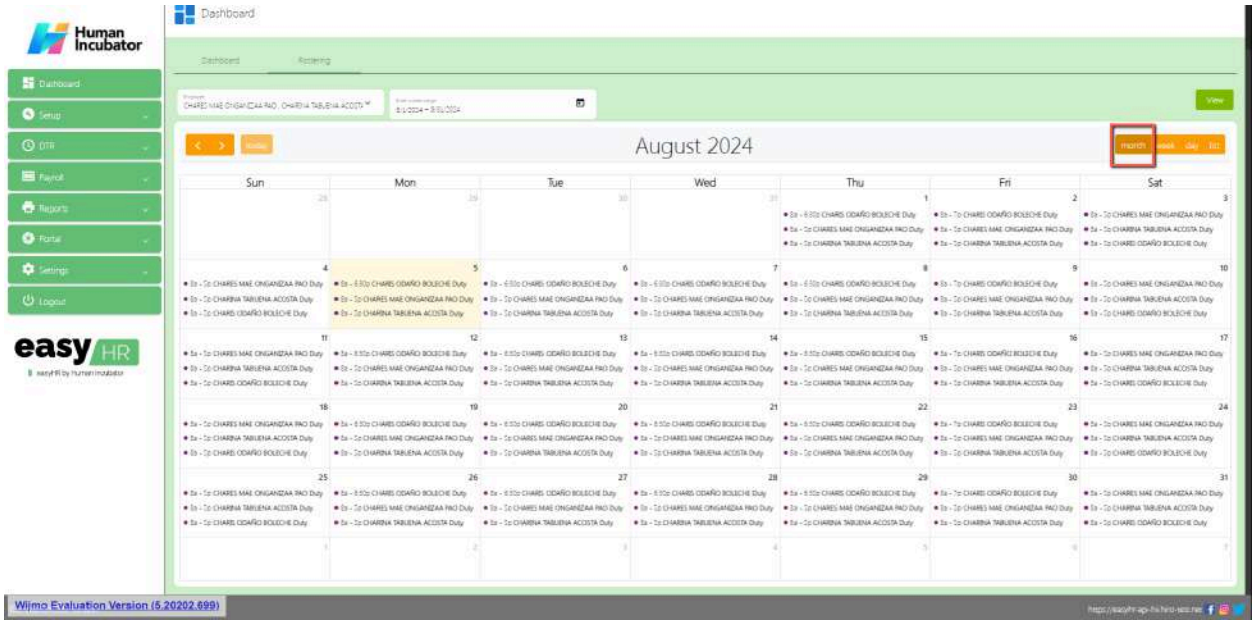
9. Click this arrow to view next week



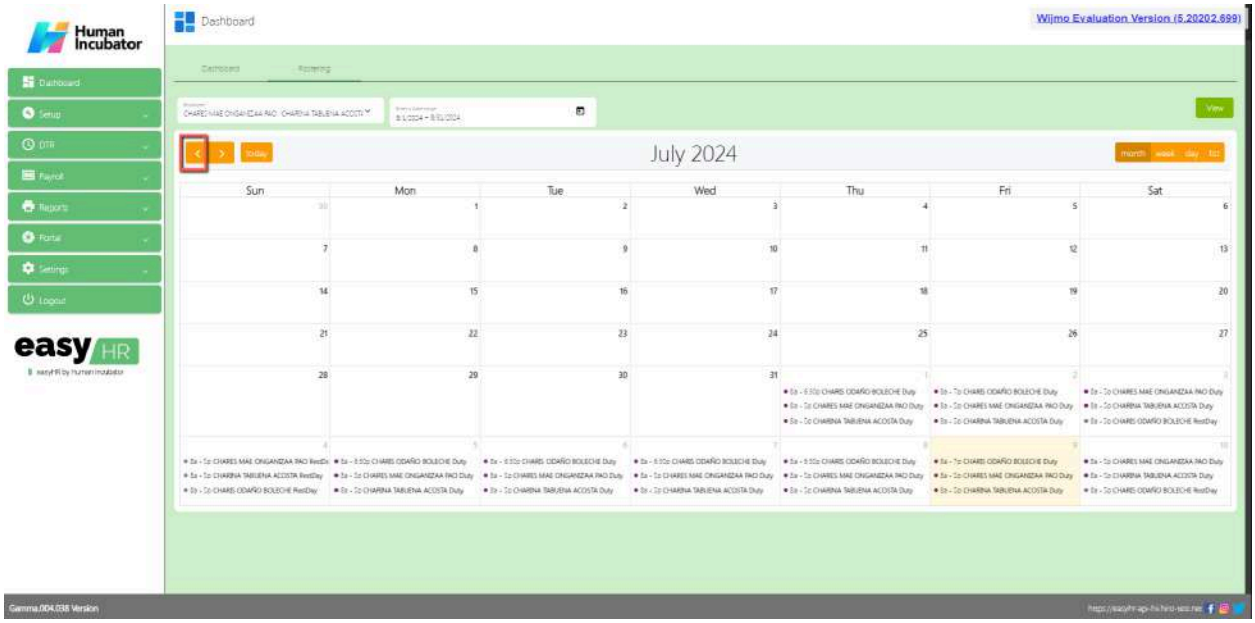
10. Click this today button to view current week



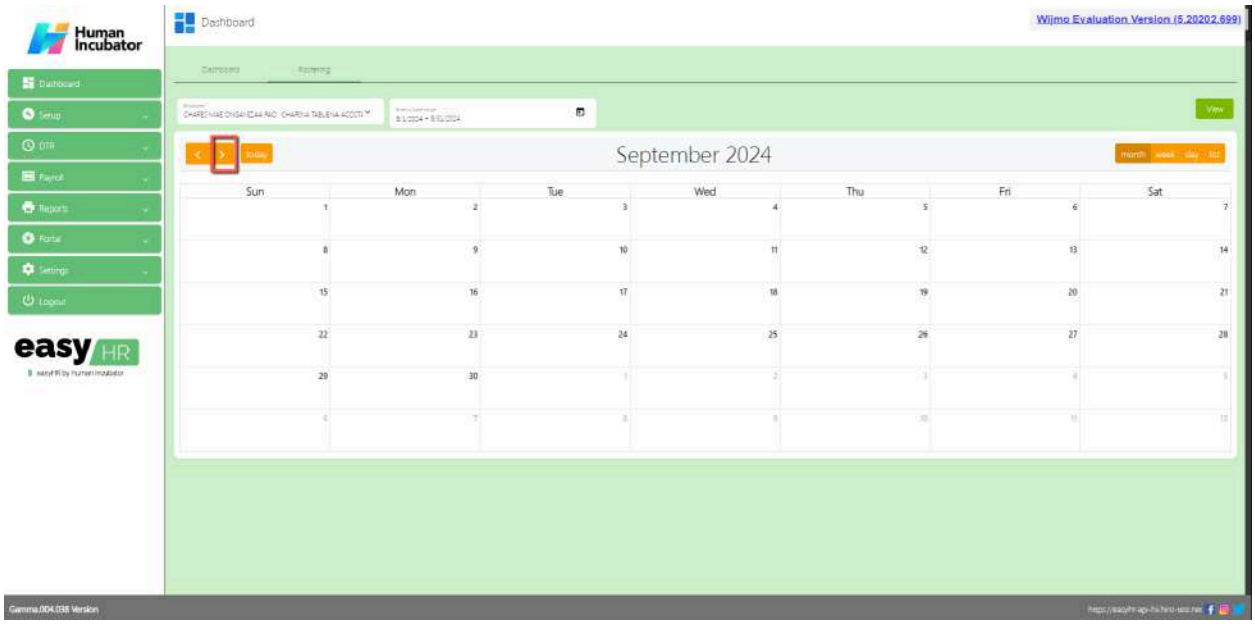
11. Month View



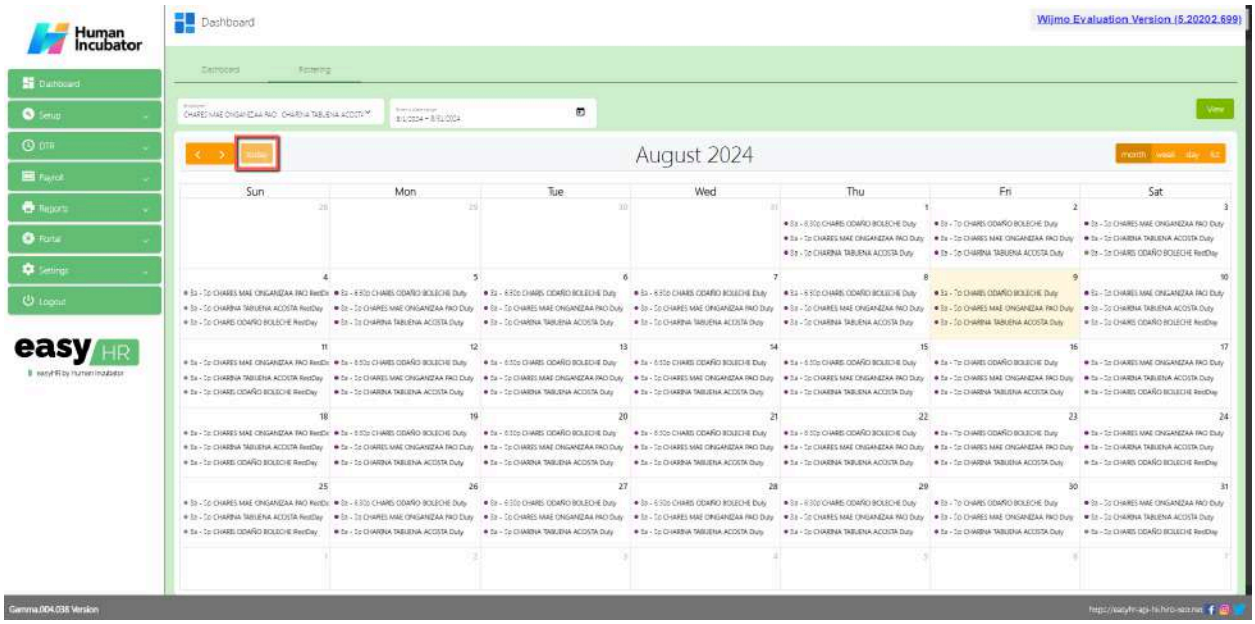
12. Click this arrow to view previous month



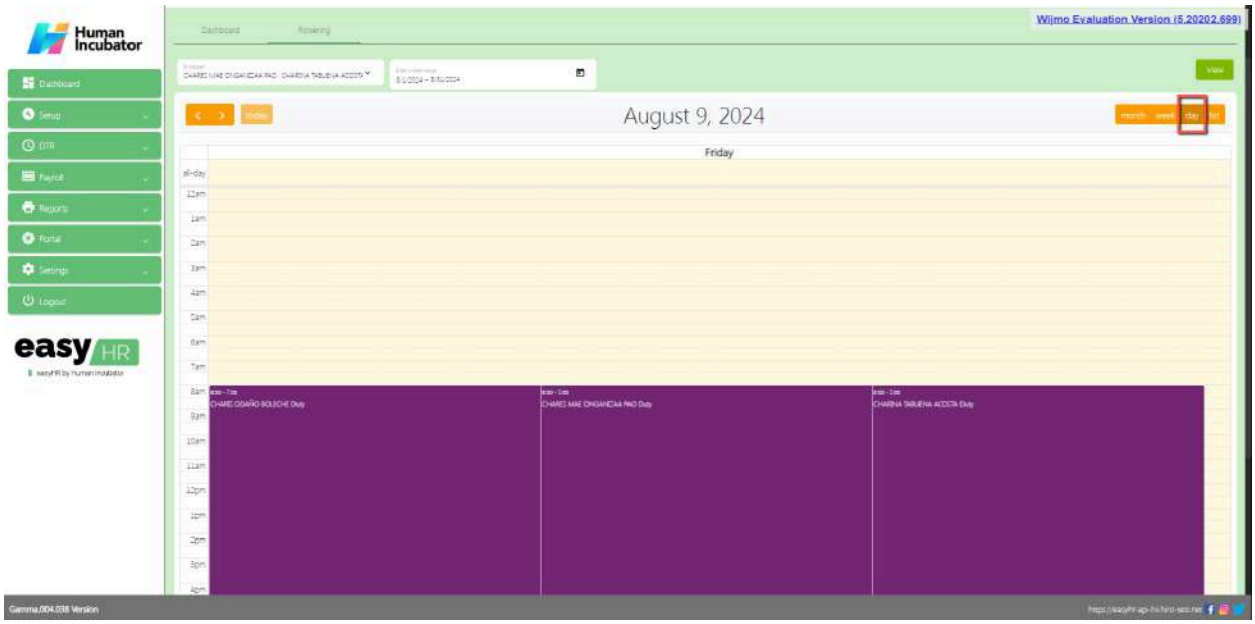
13. Click this arrow to view next month



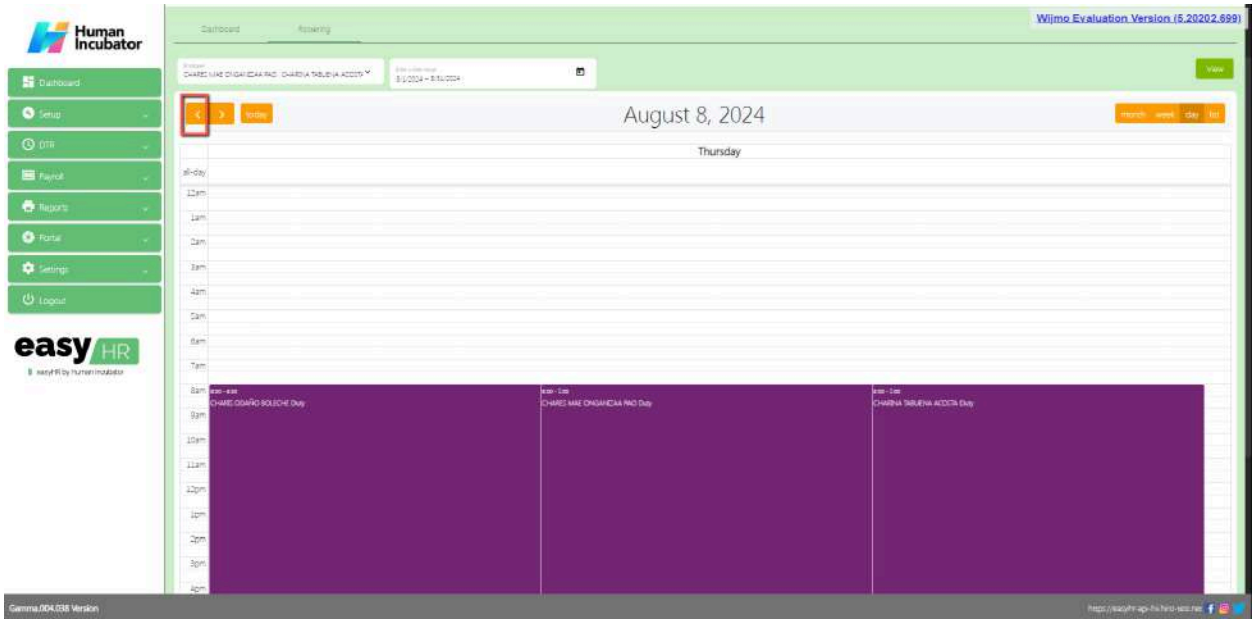
14. Click today button to view current month



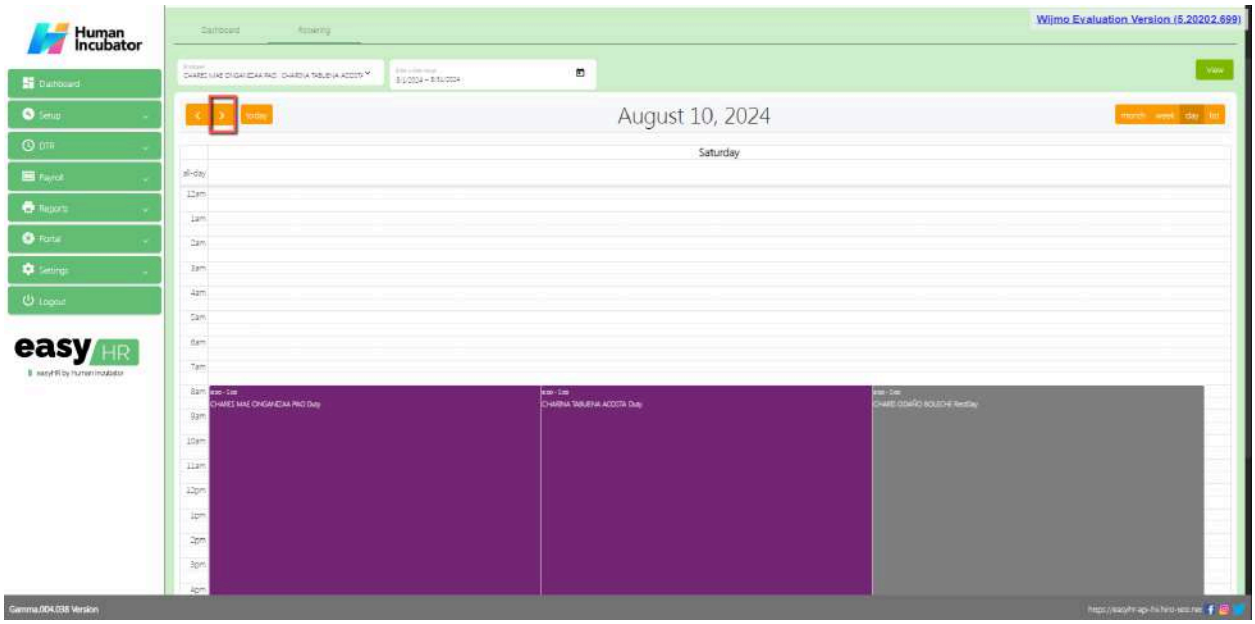
15. Day View



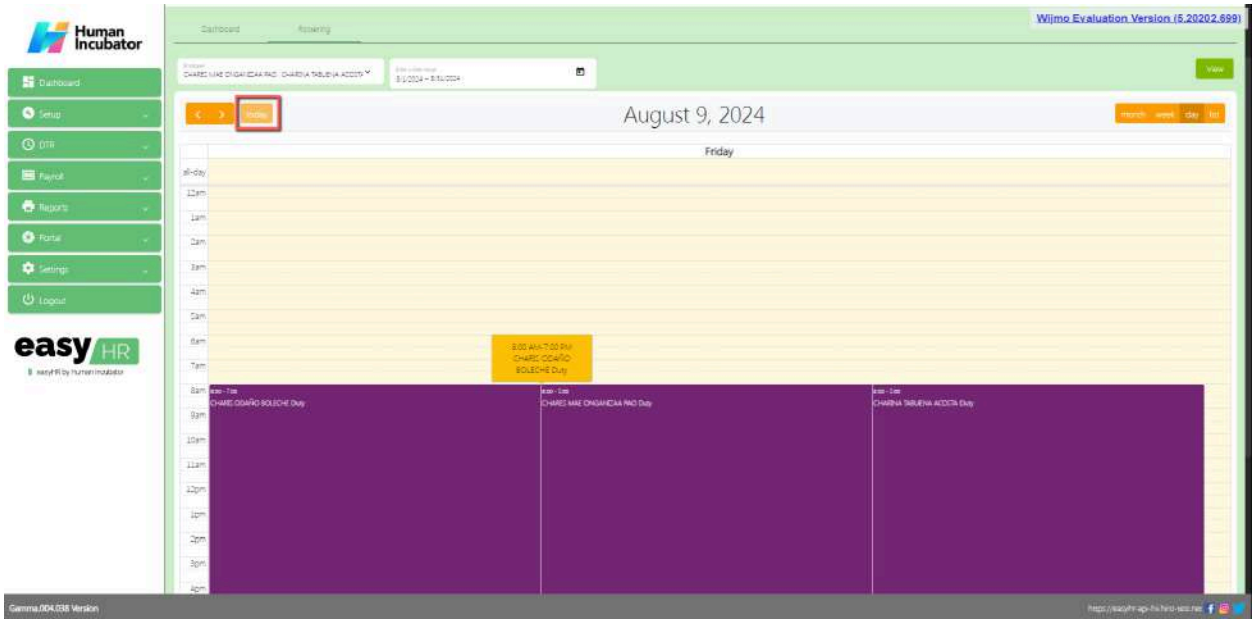
16. Click to view previous day



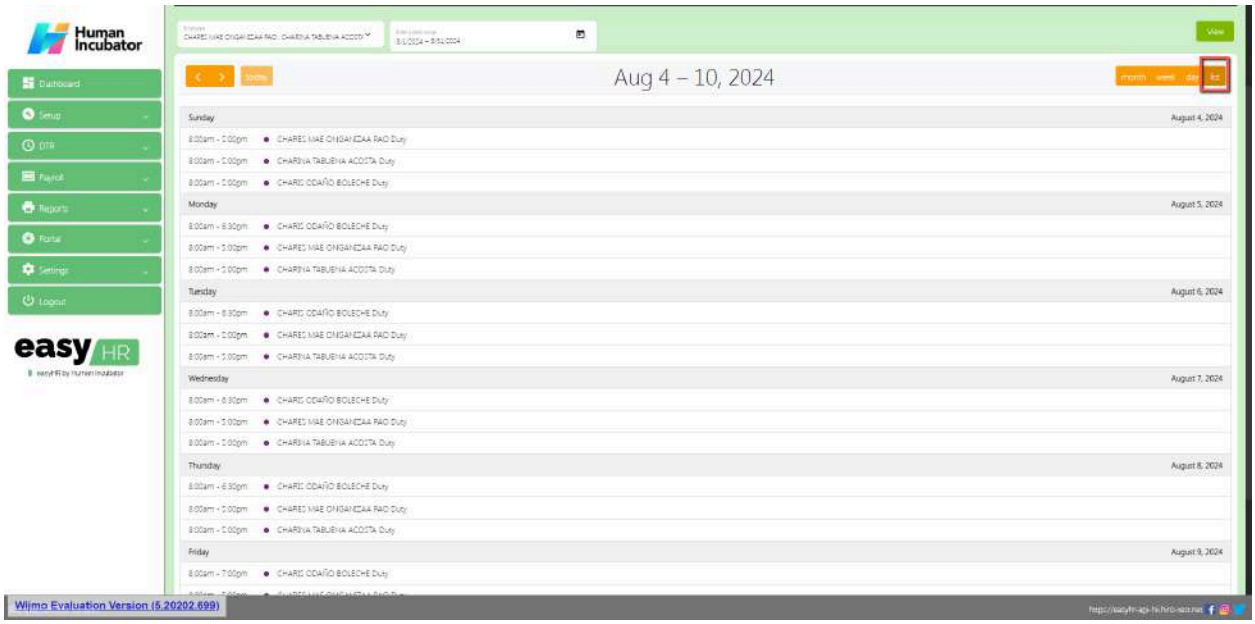
17. Click to view next day



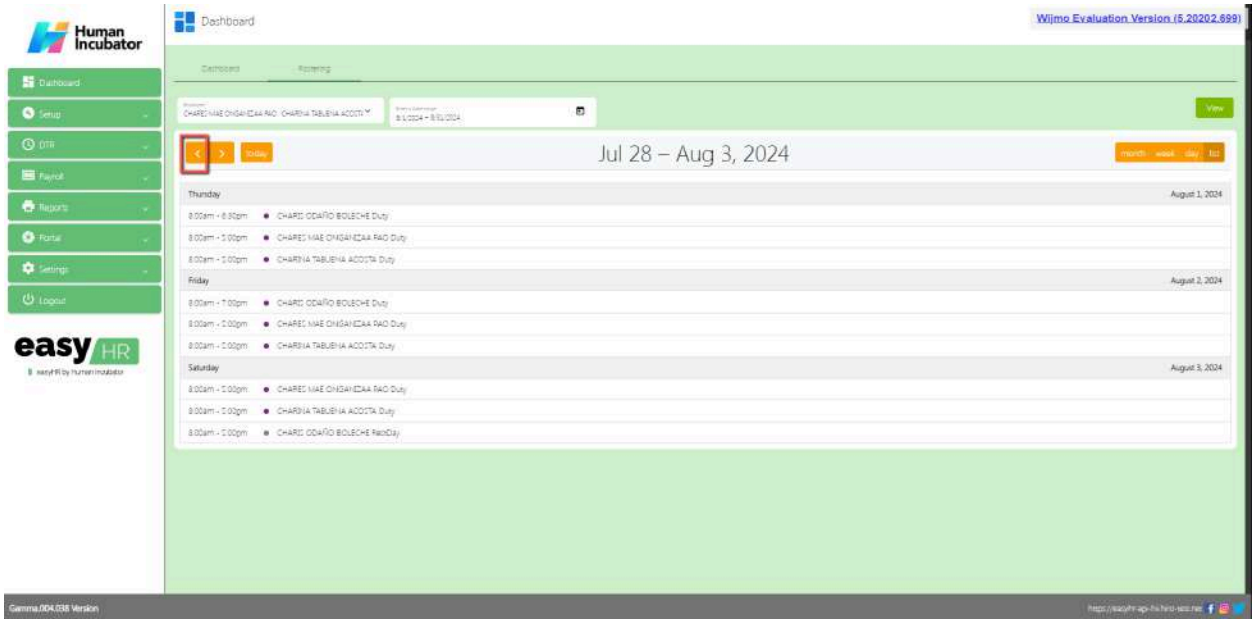
18. Click today to view current day



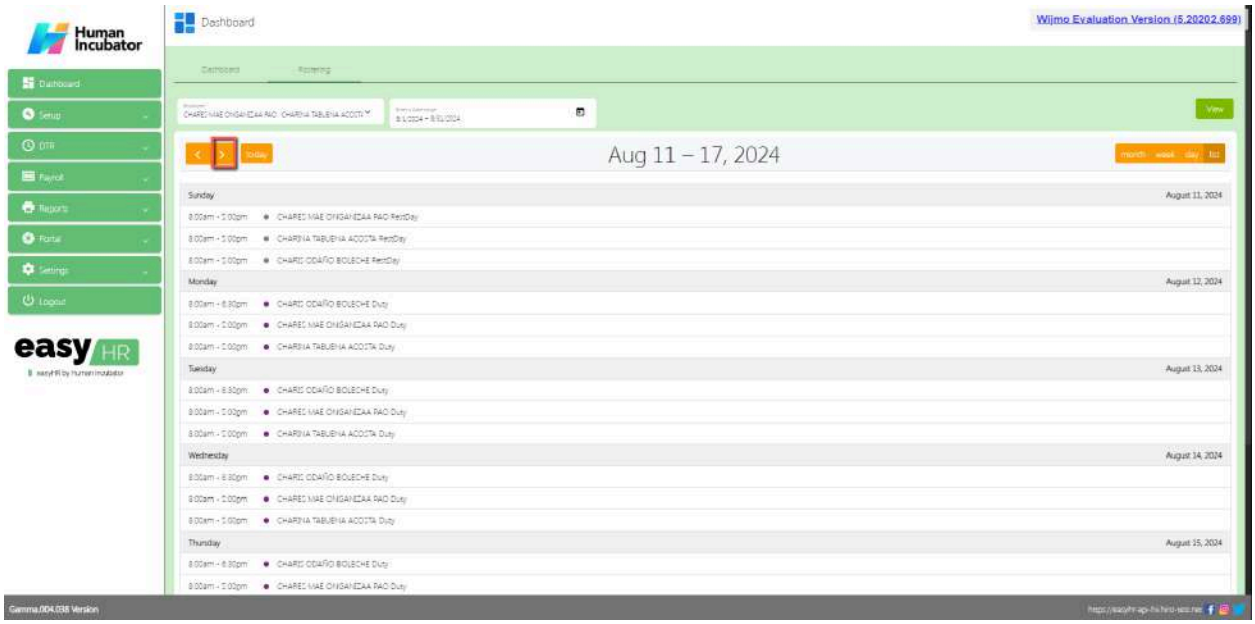
19. List View



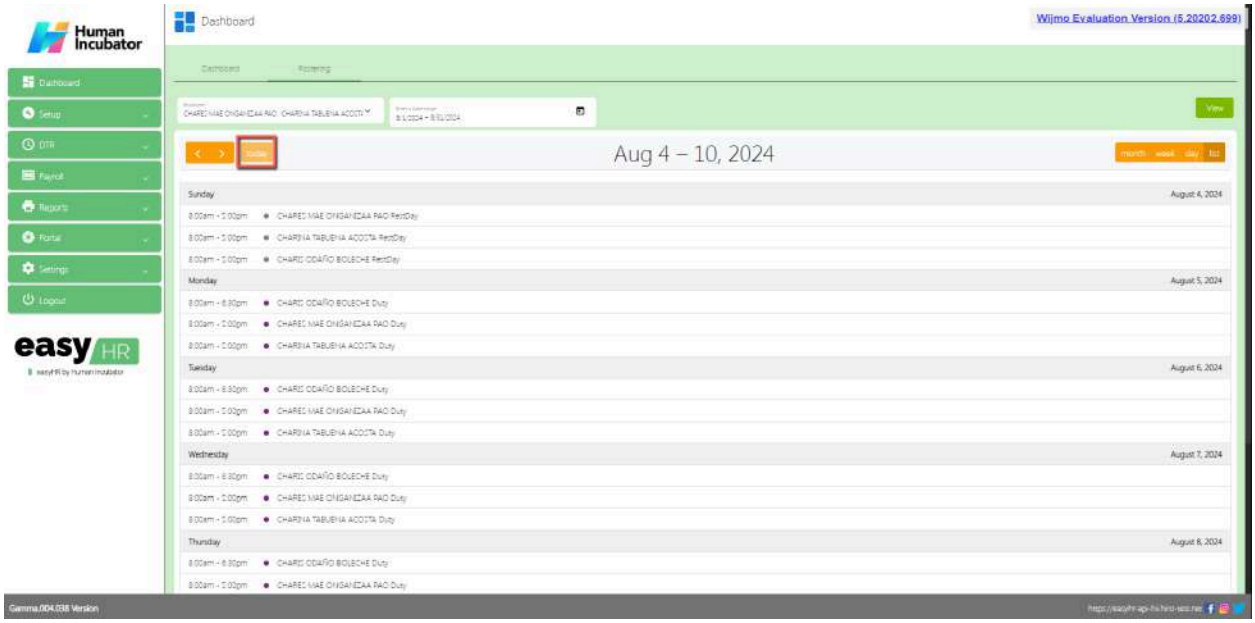
20. Click this arrow to view previous week



21. Click this arrow to view next week



22. Click today button to view current week



Section IV: Set Up

Company Setup

Overview

- Company it will use to add company, add Approver, setting for showable in payslip report, Non- Taxable/ Taxable and inclusion for 13th month and also Announcement for company.

Company List

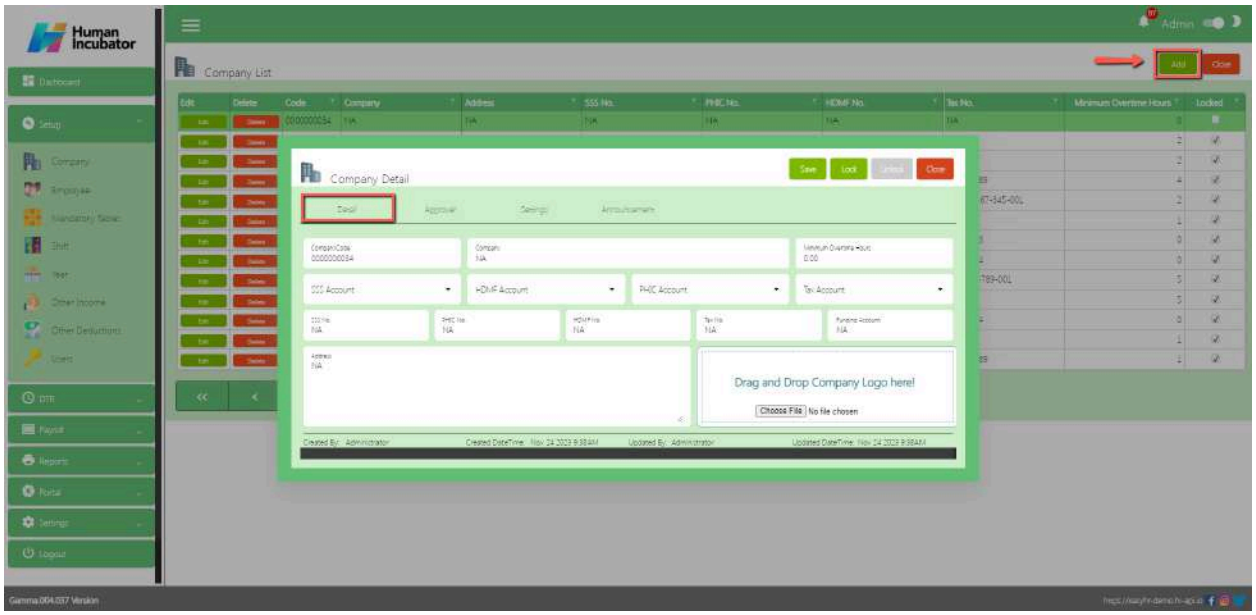
- Shows the list of all added Company.

Company List Table

- Edit: This is a button that has the function to edit the company
- Delete: This is a button that has the function to Delete the company (Note: You cannot delete the company once it already has a transaction data)
- Code: This will automatically generate according to the sequence of the added company
- Company: This column is for the Company Name
- Address: This column is for the Company Address
- SSS No.: This column is for the Company SSS No.
- PHIC No.: This column is for the Company PHIC No.
- HDMF No.: This column is for the Company HDMF No.
- Tax No.: This column is for the Company Tax No.
- Minimum Overtime Hours: You can input minimum overtime hours applicable to the company.
- Locked: If the Checkbox is checked then it is locked but if uncheck then it is unlocked. (Note: If the Company is unlocked it will not show in the other module)

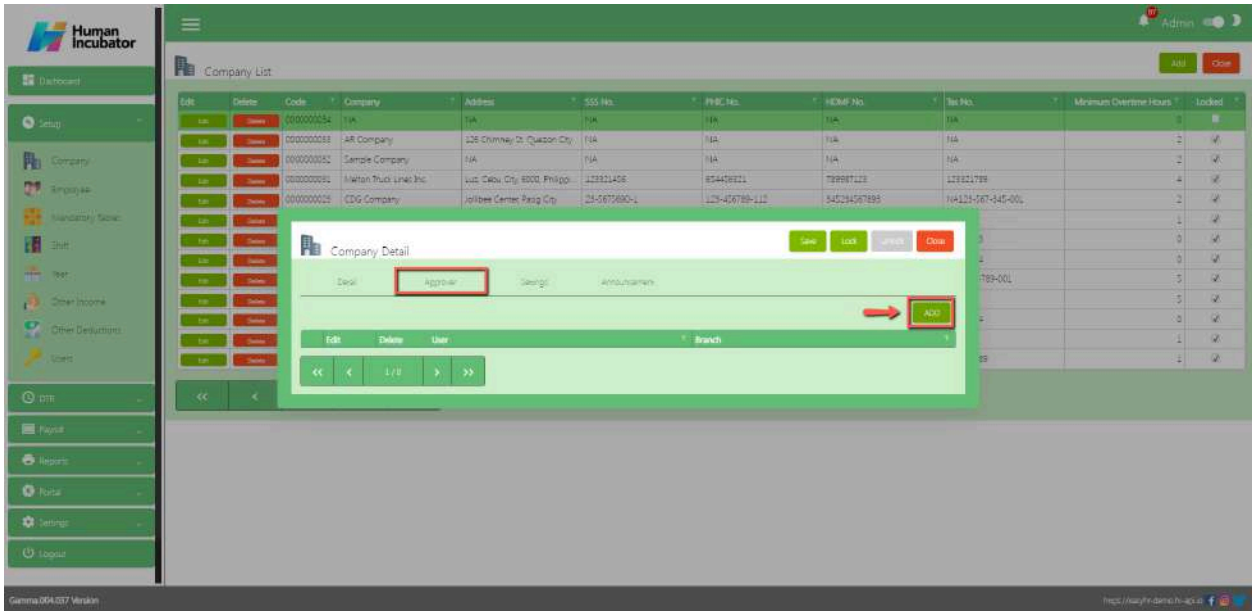
Company Detail

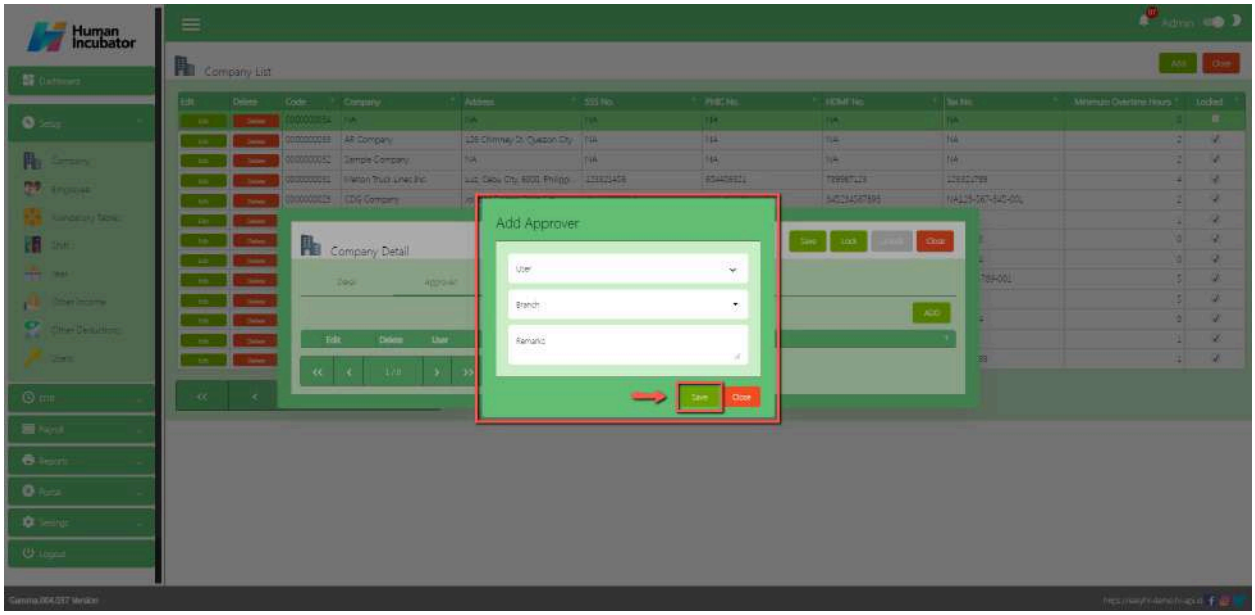
- **Assumption**: The user already clicked the **Add** button on the upper right corner in the company list.
- There are 4 tabs in company detail
    - Detail, Approver, Settings and Announcement
- The user need to select and fill up all the necessary information like
    - Company name, Minimum overtime hours, SSS no., PHIC no., HDMF no., Tax no., Funding Account, Address and company logo.
- There are some fields user need to select
    - SSS Account, HDMF Account, PHIC Account and Tax Account



Approver

- In Approver tab the user can **Add** the approver per branch
  - Select user, select the branch and also put a remarks
  - Click save button



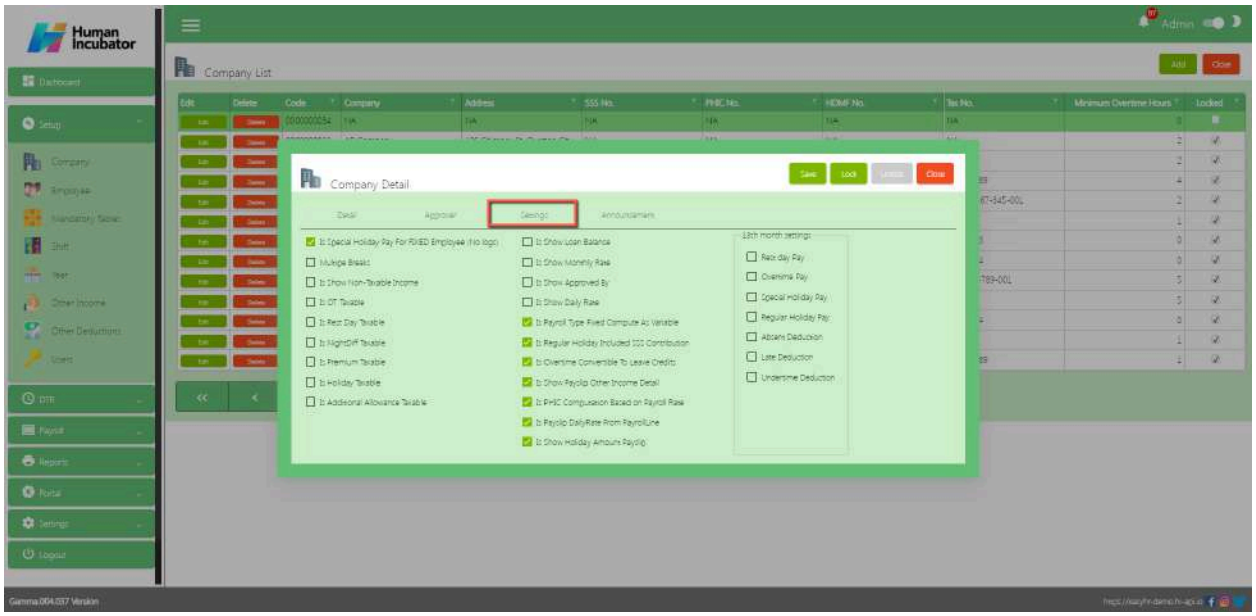


Settings

- In Settings tab the user can check the **check box**
    - The Left side in the settings is for Non-taxable/Taxable
    - The Center of the settings of for the of Showable in payslip report
    - The Right side of the settings is for Inclusion for 13th Month
        - **Is Special Holiday Pay for FIXED Employee (No logs)** - This setting is for the Fixed Employee to have a special holiday pay even if no logs.
        - **Is Payroll Type Fixed Compute As Variable** - This Setting is for Fixed Employee and the salary is computed as a variable.
        - **Is Regular Holiday Included SSS Contribution** - This setting is for the regular holiday pay will be added in SSS contribution if the employee works in regular holiday.
        - **Is Overtime Convertible To Leave Credits** - This setting is for the employee applying for overtime the employee has an option to convert to leave credits.

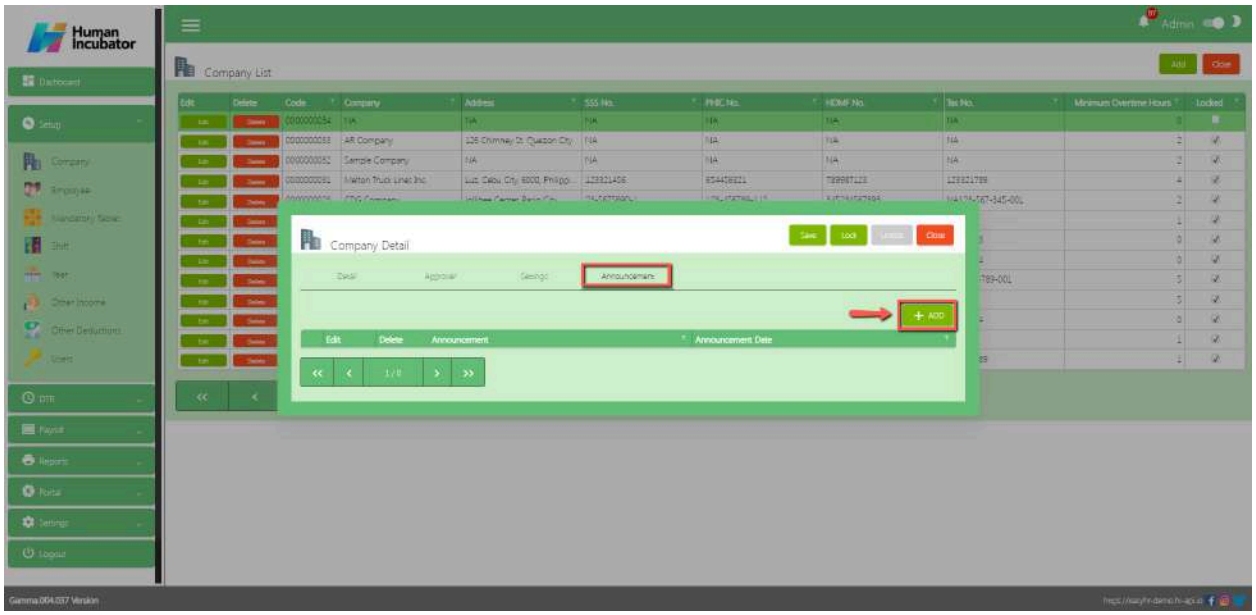
- **Is Show Payslip Other Income Detail** - This setting is for showing the other income detail in payslip.
- **Is PHIC Computation Based on Payroll Rate** - This setting is for the PHIC Computation Base on payroll rate.
- **Is Payslip DailyRate From PayrollLine** -

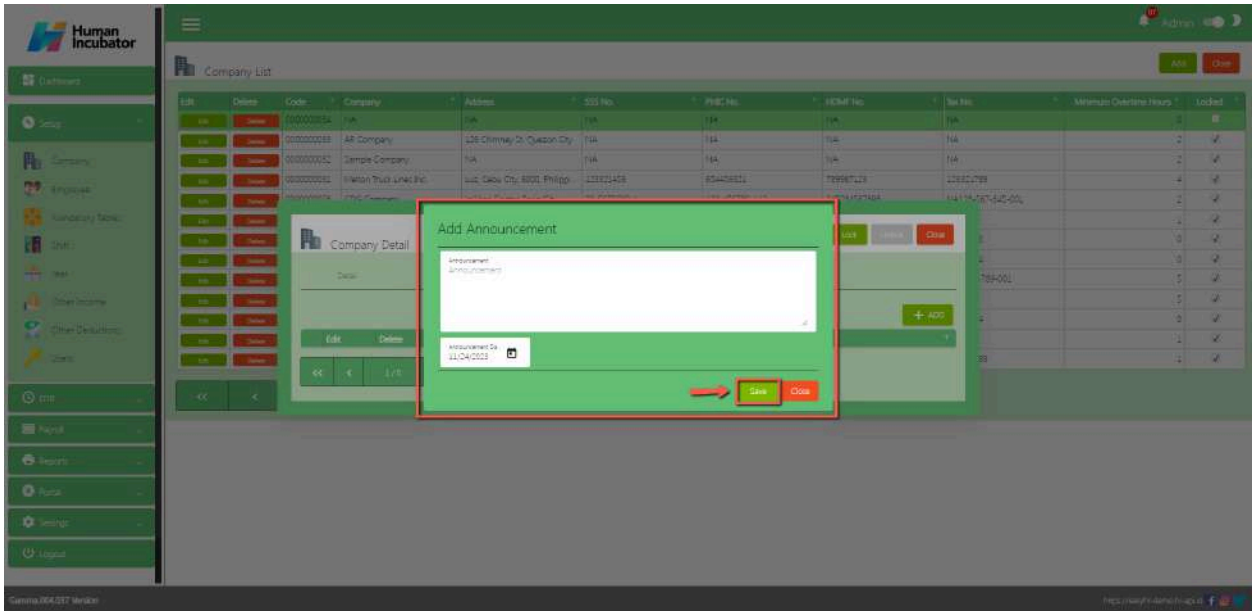
- **Is Show Holiday Amount Payslip** - This setting is for showing the amount of holiday pay in payslip.



Announcement

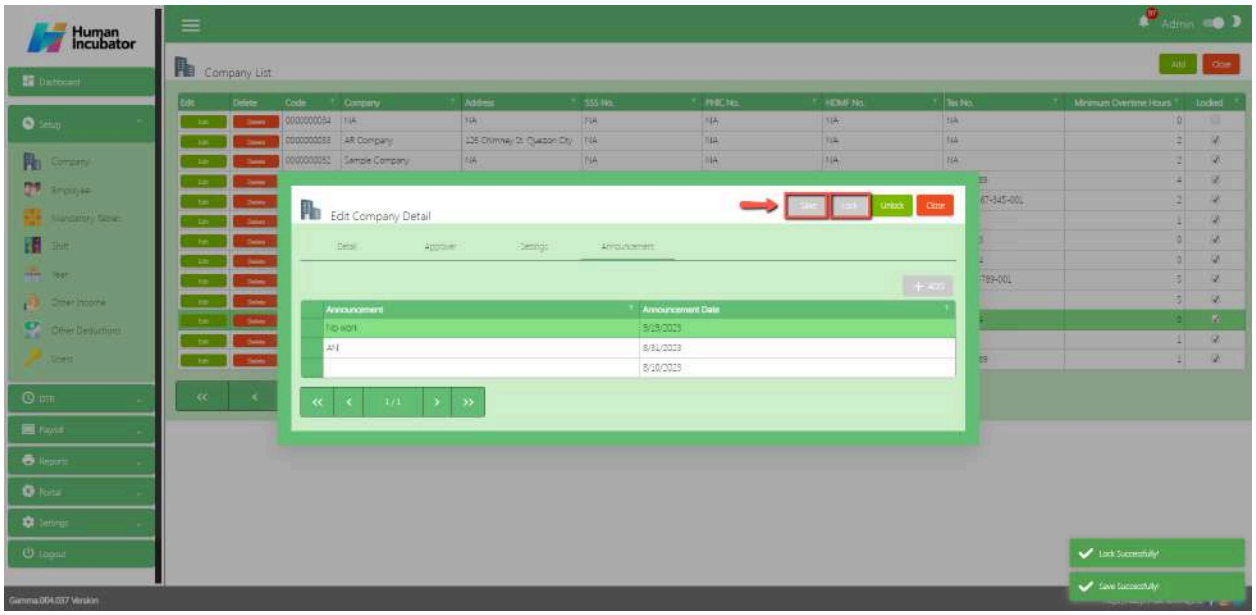
- In Announcement tab the user can **Add** the announcement in company
    - Input the announcement and Announcement date
    - Click save button





Save/Lock

- Make sure to save/lock the record so that in every transaction the company details will show.



Employee Setup

Overview

- Employee is used for add Employee, Employee detail, Payroll, Shift Schedule, Payroll Group

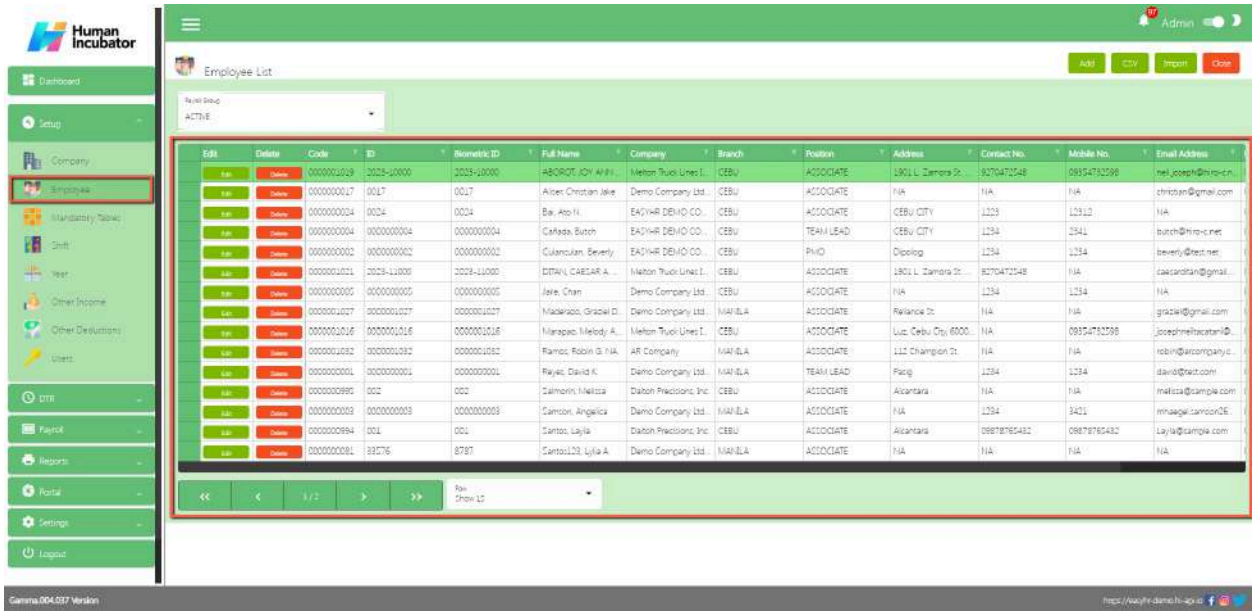
Employee List

- Shows all the list of the employee

Employee List Column

- Edit: This is a button that has the function to edit the company
- Delete: This is a button that has the function to Delete the Employee (Note: You cannot delete the Employee once it already has a transaction data)
- Code: This will automatically generate according to the sequence of the added Employee
- ID: This is for the Employee ID
- Biometric ID: This is for the Employee Biometric ID if the Company is using a Biometric Device for their Employee's logs
- Full Name: This is for the Employees Fullname
- Company: This is for the Employees Company
- Branch: This is for the Employees Branch
- Position: This is for the Employees Position
- Address: This is for the Employees Address

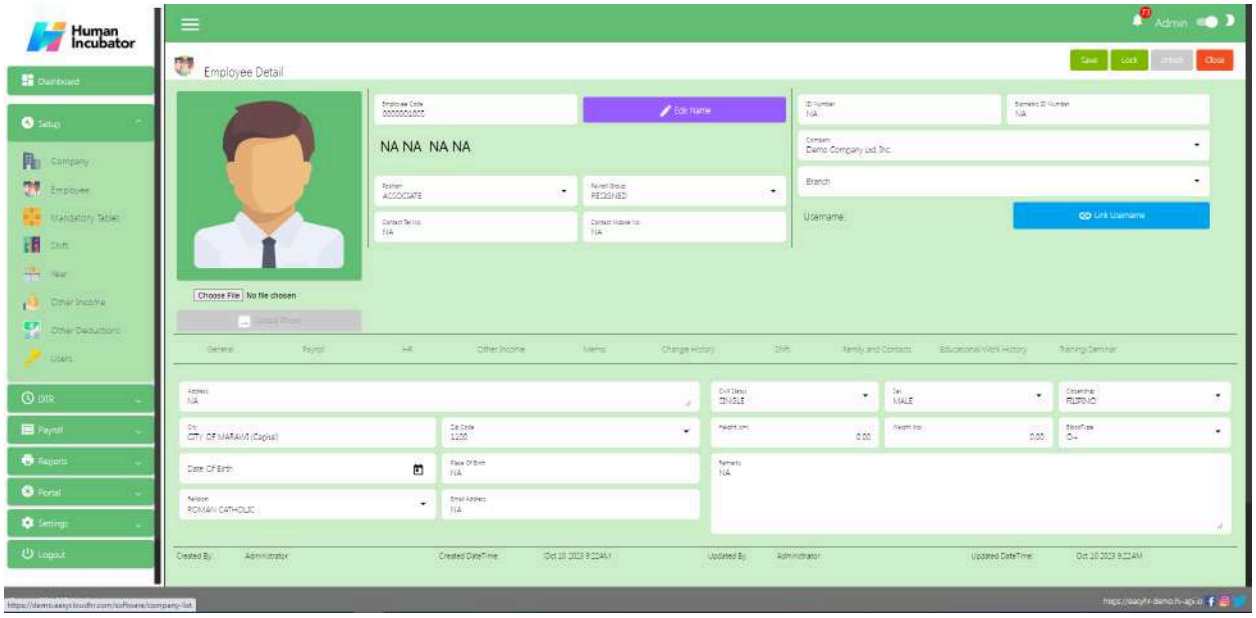
- Contact No.: This is for the Employees Contact No.
- Mobile No.: This is for the Employees Mobile No.
- Email Address: This is for the Employee's Email Address
- Remarks: You can put any Remarks for this Employee
- Locked: If the Checkbox is checked then it is locked but if uncheck then it is unlocked. (Note: If the Employee is unlocked it will not show in the other module)



Employee Detail

- **Assumption**: The user already clicked the **Add** button that can be seen on the Employee List.
- Fill all the important fields for Employee Detail like:
    - Click **Edit Name** button to fill up the Last name, First name, Middle name, Extension name
    - ID number
    - Biometric number
    - Select Company
    - Select Branch
    - Upload Photo
    - Select Position
    - Select Payroll Group

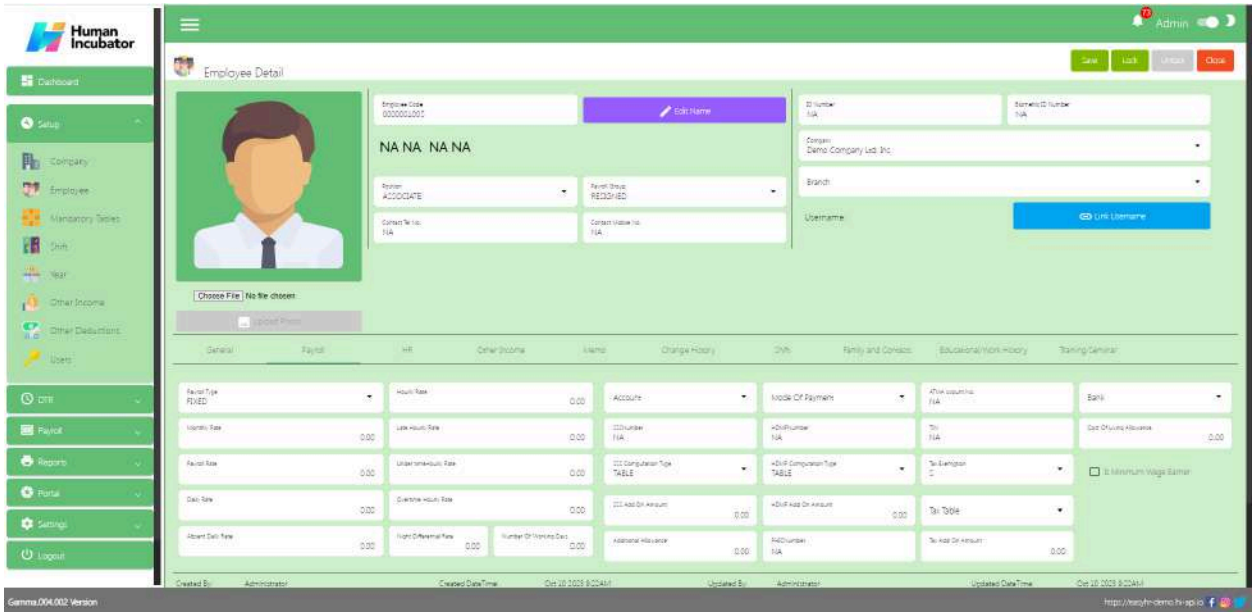
- Contact Tel No.
- Contact Mobile No.
- Address
- Select City
- Select Date of Birth
- Select Religion
- Select Zip Code
- Place of Birth
- Email Address
- Select Civil Status
- Select Sex
- Select Citizenship
- Height
- Weight
- Blood Type



Payroll

- In **Payroll** tab the user can input monthly rate and mandatory account of employee
- Select and Fill all the important fields for Employee Detail like:
  - Select Payroll Type
  - Monthly Rate

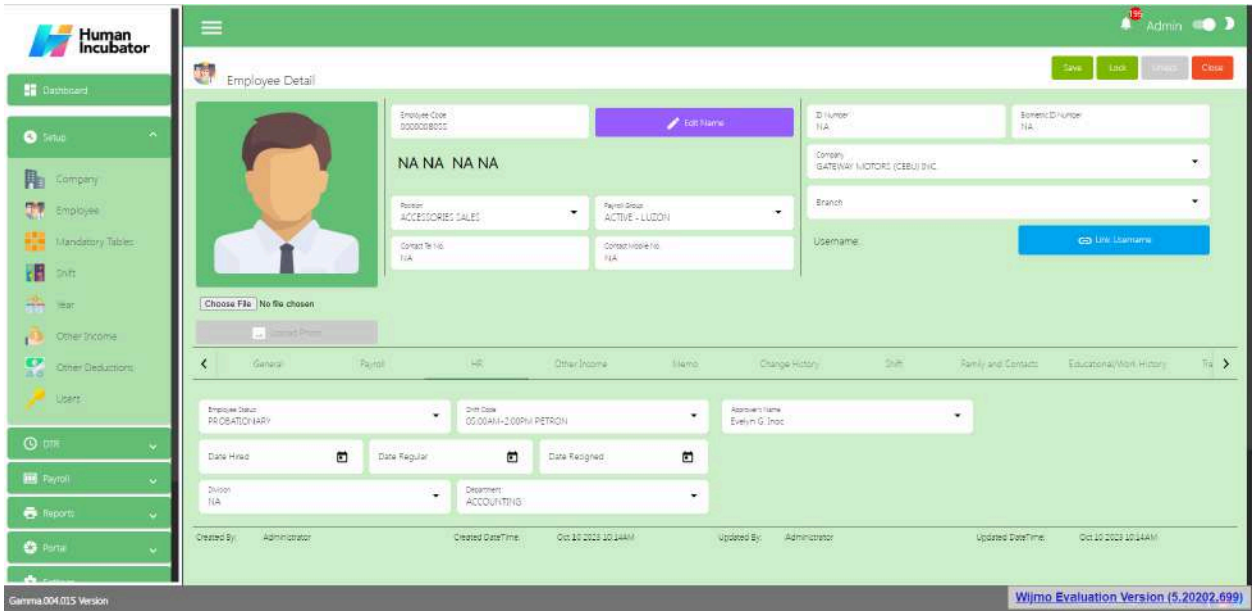
- Number of Working Days
- Input SSS Number
- Input HDMF Number
- Input PHIC Number
- Input TIN
- Tax Exemption
- Select SSS Computation Table
- Select HDMF Computation Table
- Tax Table
- Select Mode of Payment
- Input Additional Allowance if Necessary
- Input ATM Account Number
- Select Bank



HR

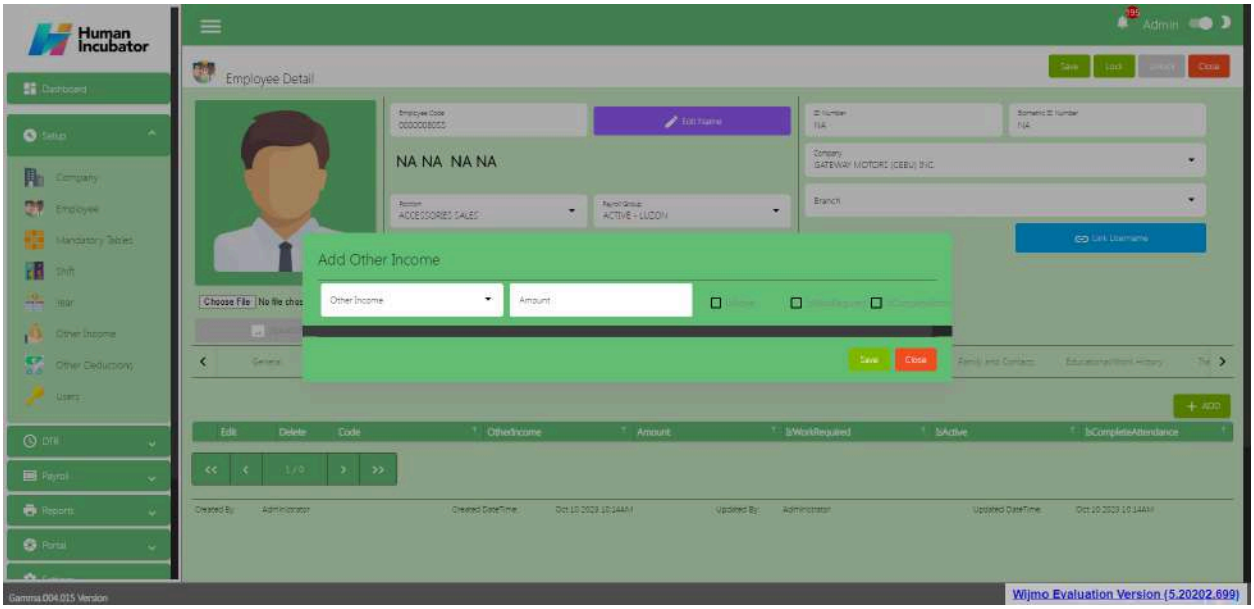
- In the **HR** tab the user can select the status of the employee and also the Date hired.
- Select the important fields like:
  - Employee Status
  - Shift Code
  - Date Hired

- Date Regular
- Division
- Department
- Approver's Name



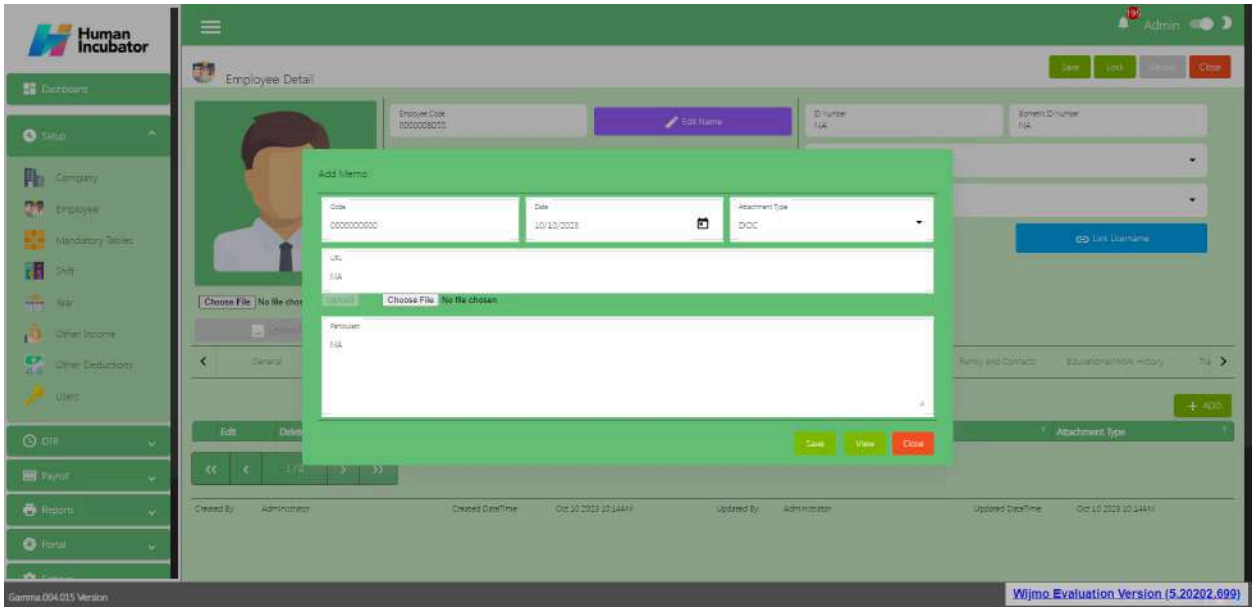
Other Income

- In **Other Income** tab the use can add the other income of the employee
  - Click the **Add** button
  - Select other Income
  - Input Amount
  - Check the box **IsActive, IsWorkRequired**
  - Click **Save** button to add in Other Income table



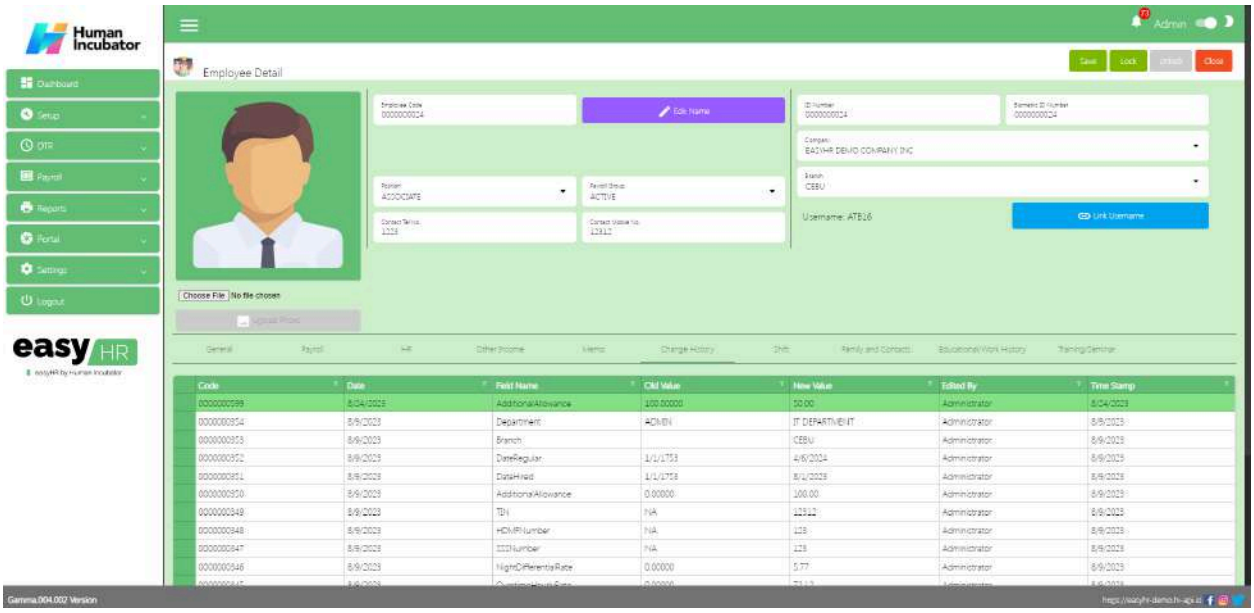
Memo

- In **Memo** tab the user can **Add** the file for employee
    - Click **Add** button
    - Select Date
    - Select Attachment Type and Choose file
    - Input Particulars if Necessary
    - Can click **View** button
    - Click **Save** button to Add in Memo table



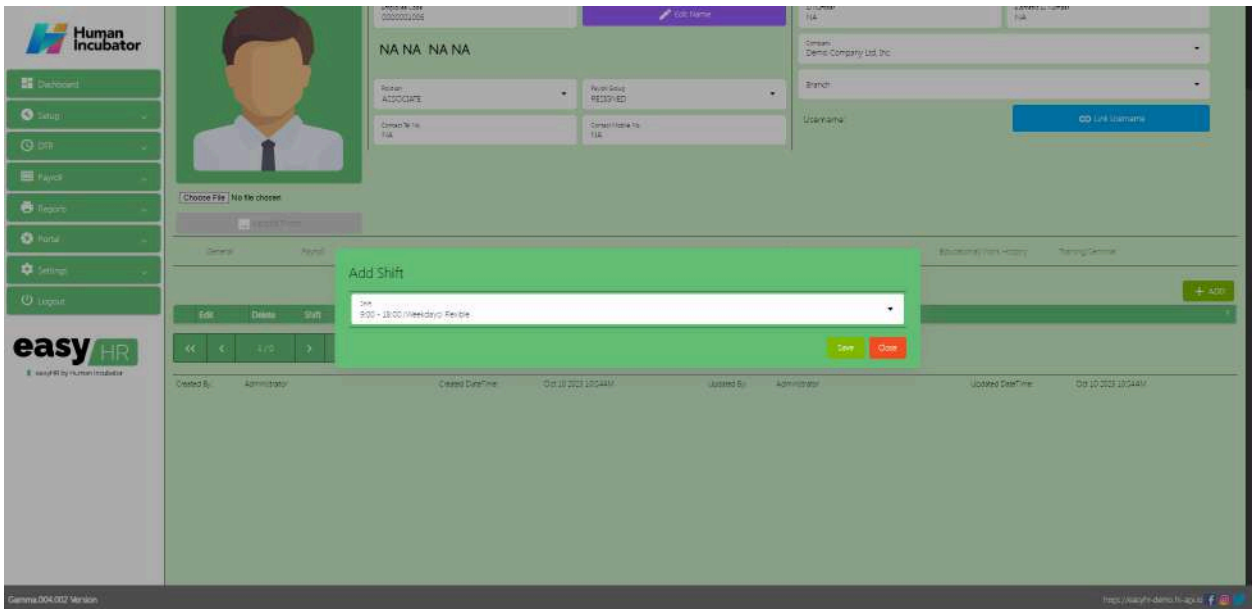
Change History

- In the **Change History** tab the user can identify what are those changes in employee 201 or employee detail.



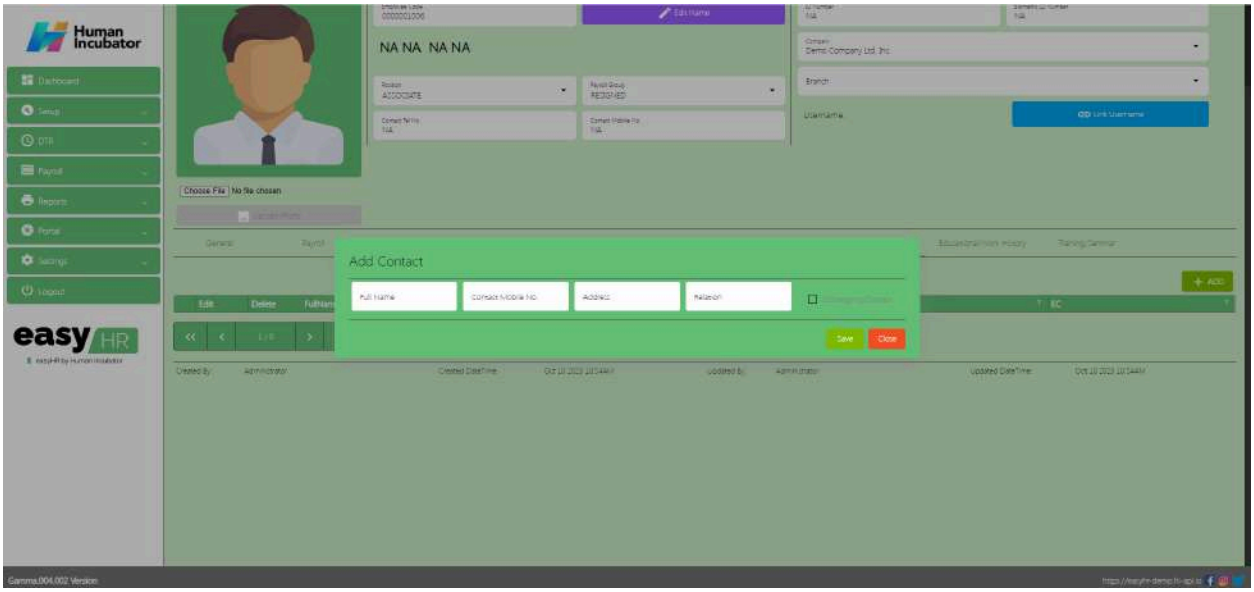
Shift

- In **Shift** tab the user can **Add** other shift of employee
    - Click **Add** button
    - Select Shift
    - Click **Save** button to add in Shift table



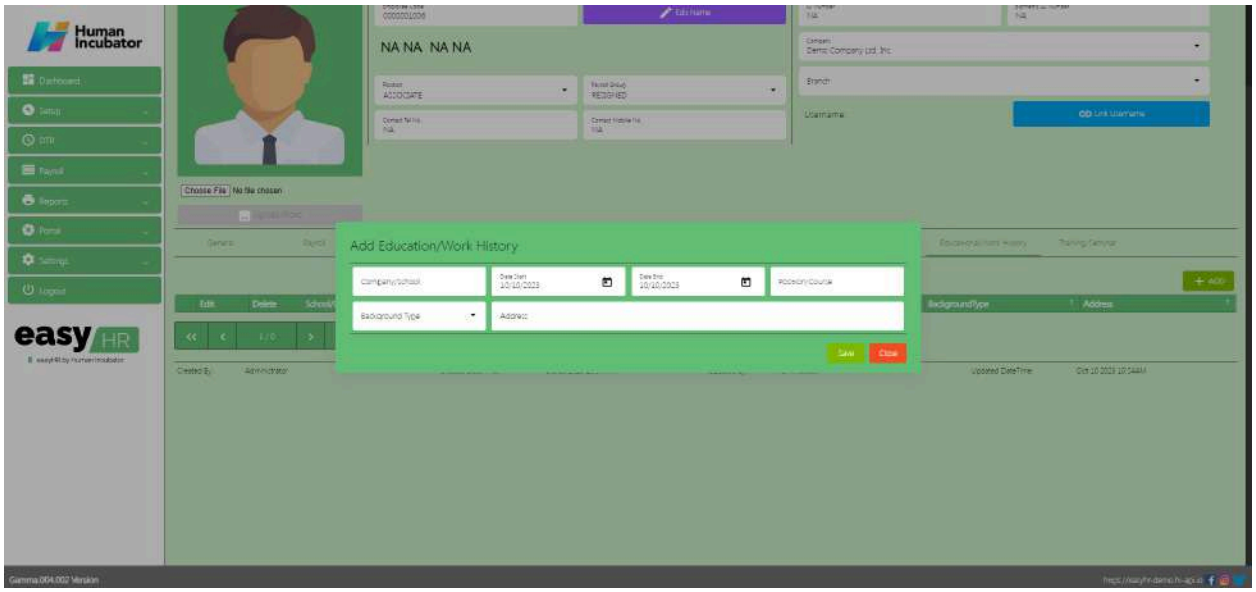
Family and Contacts

- In **Family and Contacts** tab the user can **Add** contacts for his family
    - Click **Add** button
    - Fill all the important fields
    - Click **Save** button to **Add** in table



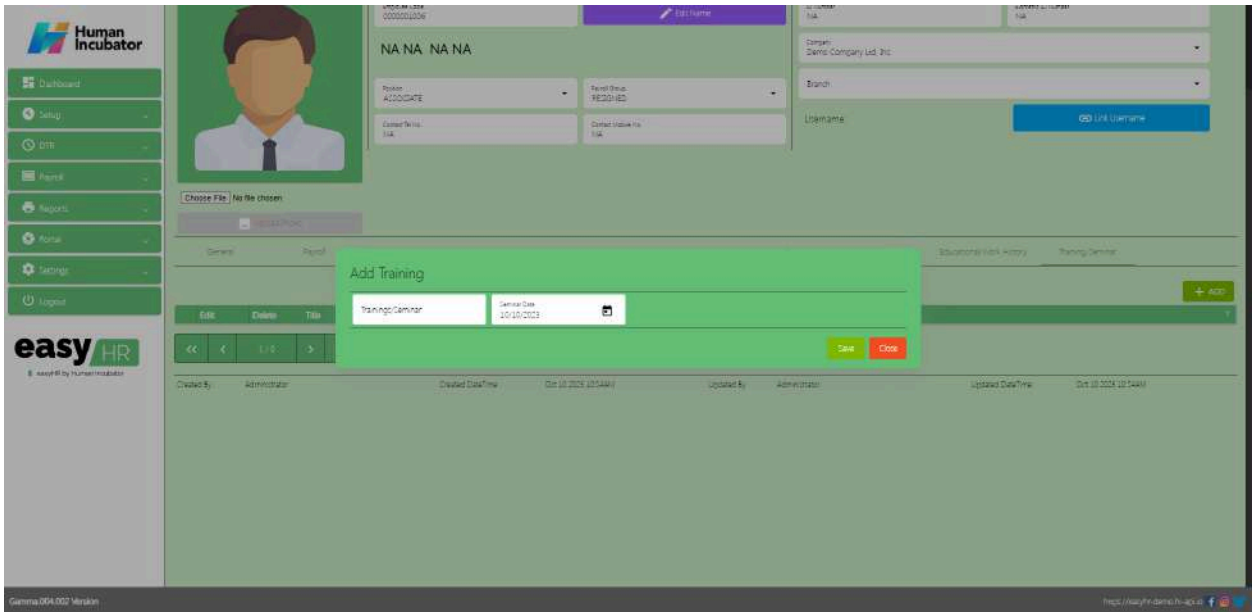
Educational/Work History

- In **Educational/ Work History** tab the user can **Add** the educational attainment and Work History
    - Click **Add** button
    - Fill all the important fields
    - Click **Save** button to **Add** in table



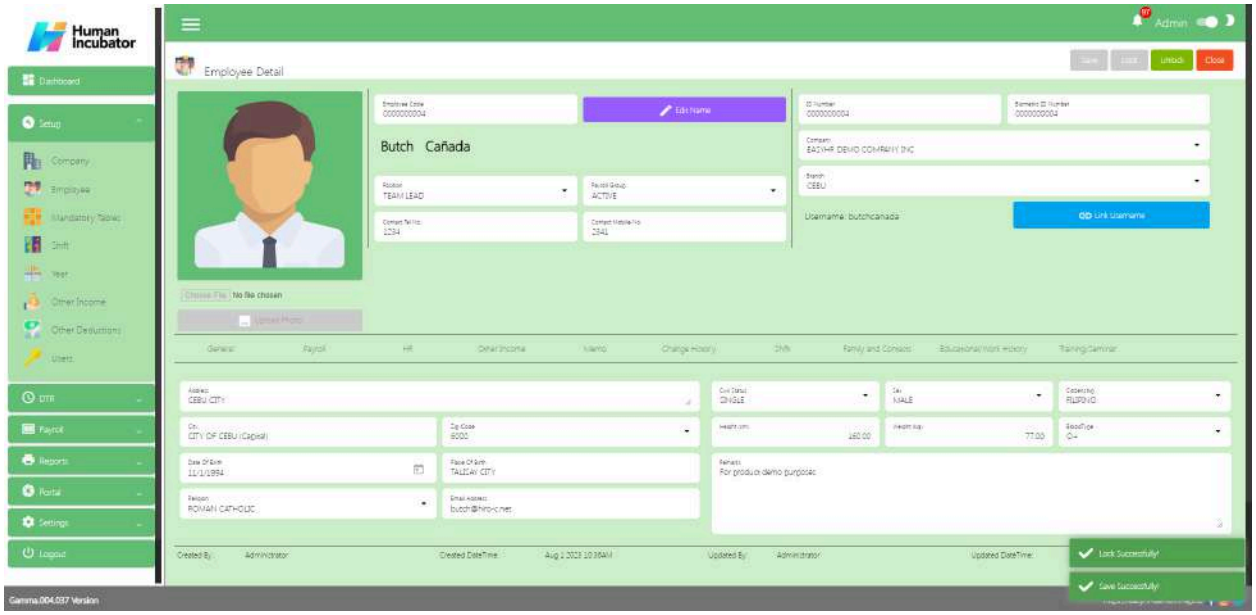
Training/Seminar

- In **Training/Seminar** tab the user can **Add** if the employee has a seminar
    - Click **Add** button
    - Fill all the important fields
    - Click **Save** button to **Add** in table



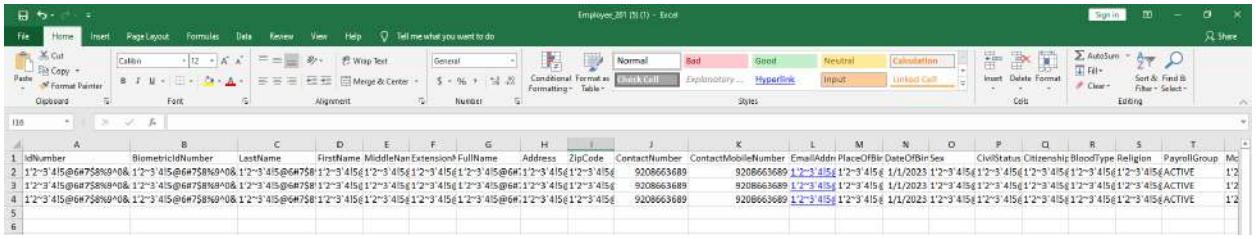
Save/Lock

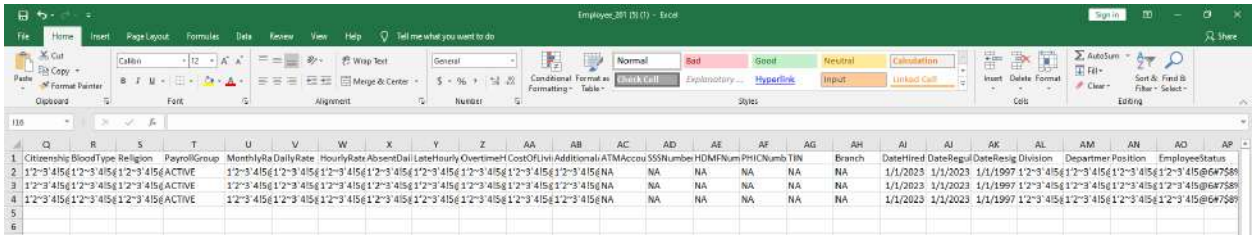
- Make sure to save/lock the record so that in every transaction the employee details will show.



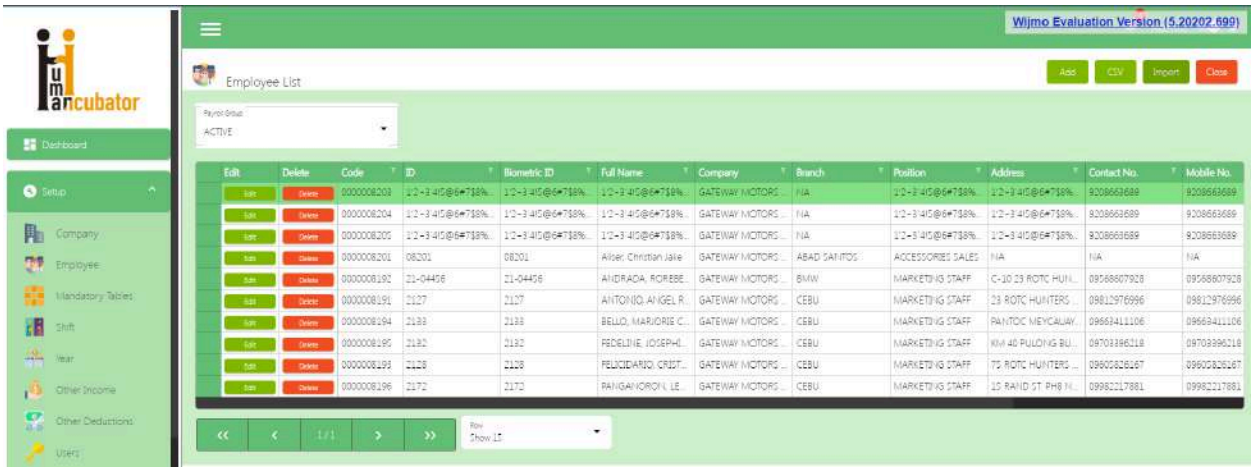
Employee Special Characters Importing

- Input special Characters in all the fields that is not Integer required

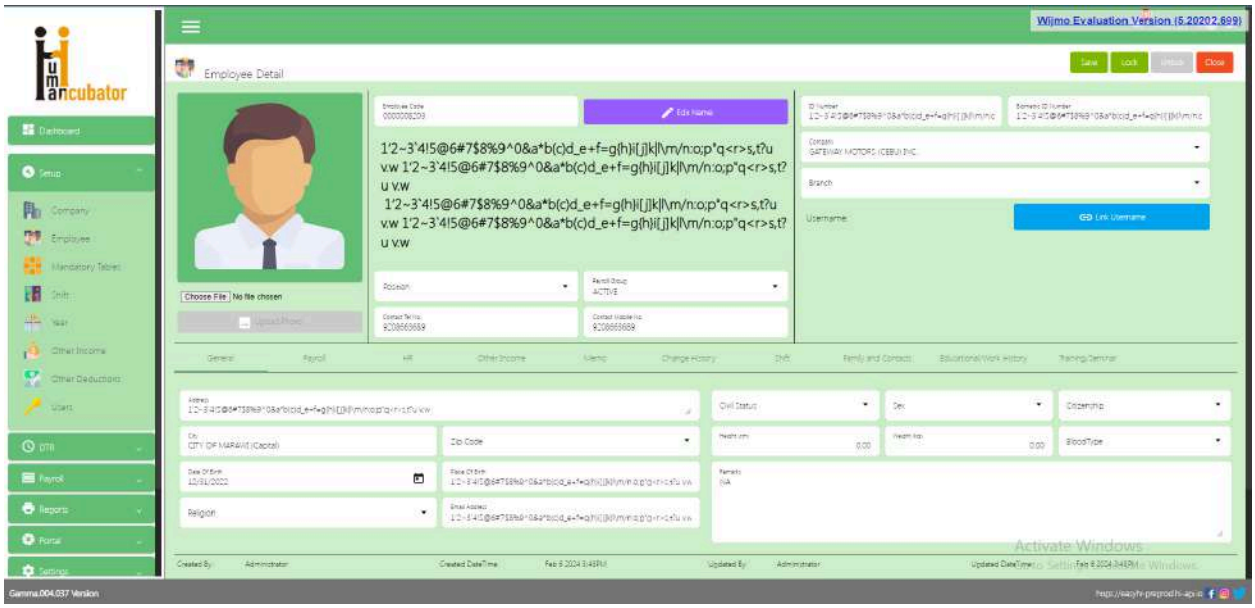




- Import in the Employee 201

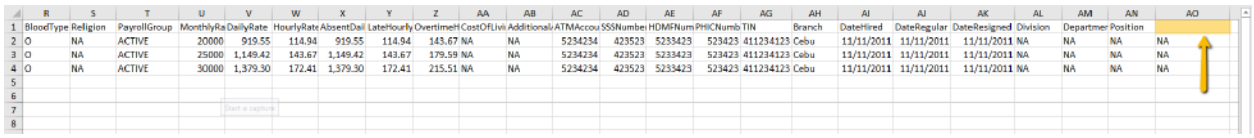


- Can now accept Special Characters



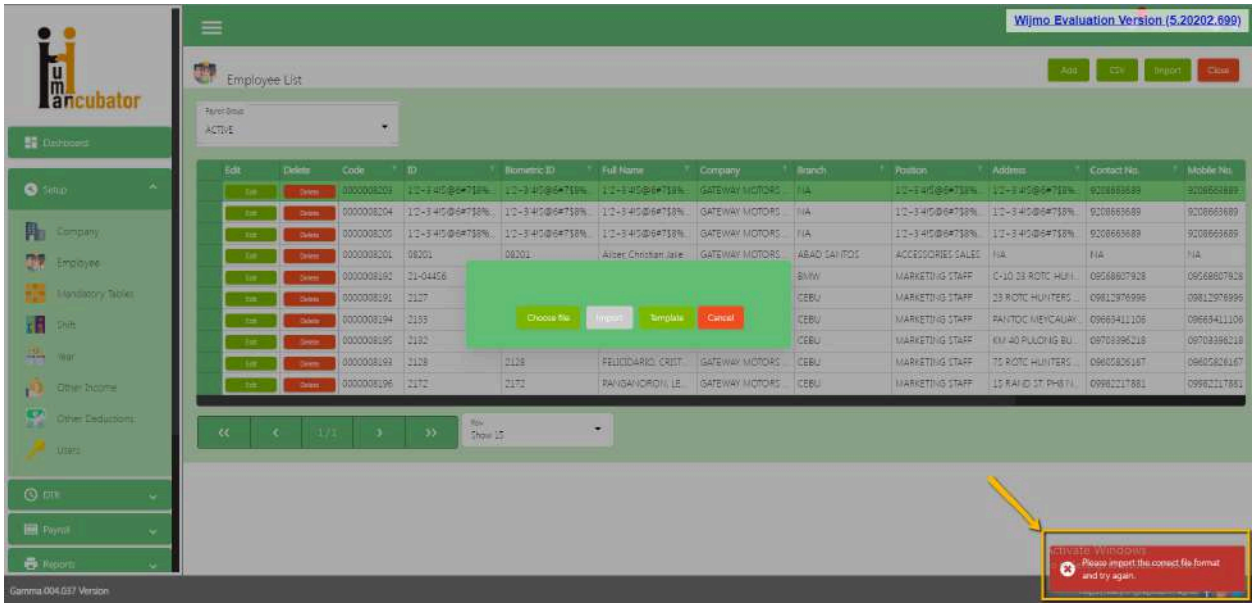
Import Employee Incorrect File format Error Message

- Delete column name “EmployeeStatus”



	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO
1	BloodType	Religion	PayrollGroup	MonthlyRa	DailyRate	HourlyRate	AbsentDail	LateHourly	OvertimeH	CostOfLivi	Additionals	ATMAccou	SSSNumbe	HDMFNum	PHICNumb	TIN	Branch	DateHired	DateRegular	DateResigned	Division	Departmer	Position	
2	O	NA	ACTIVE	20000	919.55	114.94	919.55	114.94	143.67	NA	NA	5234234	423523	5233423	523423	411234123	Cebu	11/11/2011	11/11/2011	11/11/2011	NA	NA	NA	NA
3	O	NA	ACTIVE	25000	1,149.42	143.67	1,149.42	143.67	179.59	NA	NA	5234234	423523	5233423	523423	411234123	Cebu	11/11/2011	11/11/2011	11/11/2011	NA	NA	NA	NA
4	O	NA	ACTIVE	30000	1,379.30	172.41	1,379.30	172.41	215.51	NA	NA	5234234	423523	5233423	523423	411234123	Cebu	11/11/2011	11/11/2011	11/11/2011	NA	NA	NA	NA
5																								
6																								
7																								
8																								

- Import Employee

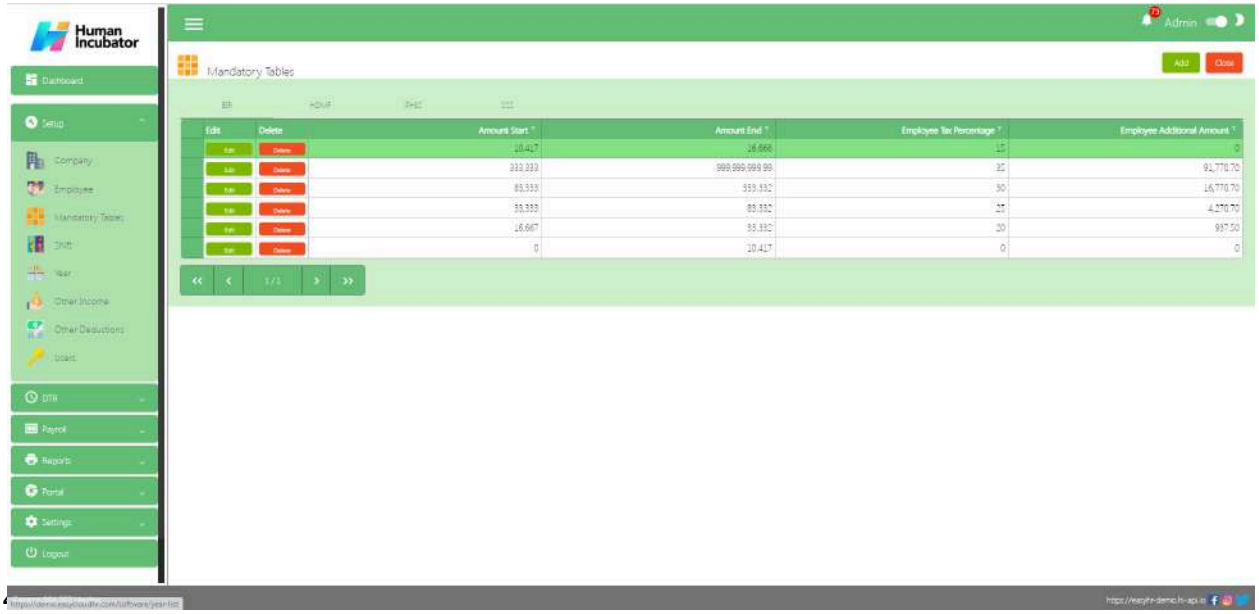


Mandatory Tables

Overview

- Mandatory table is used for mandatory deduction for employee

  Note: Please do not change the mandatory table it's all based on the government mandate (Update the range mandatory deduction if there is changes in government mandate)

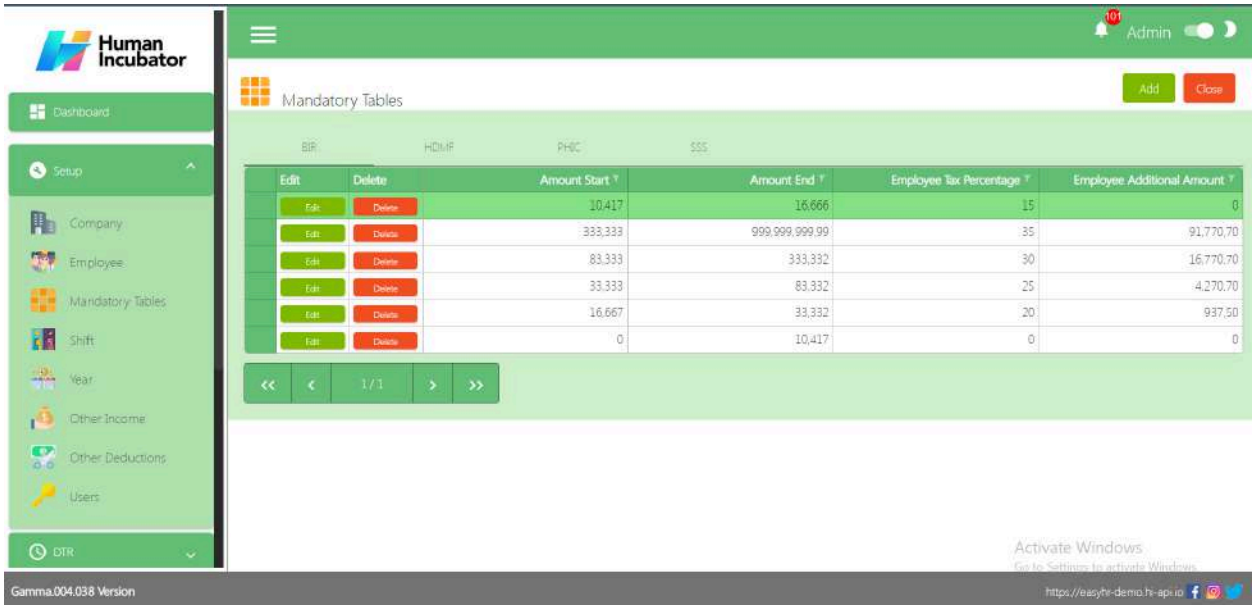


BIR Mandatory

BIR Mandatory is based on the Employee's Payroll Rate

Column Table

- Edit: This is a button that has the function to edit the mandatory per line
- Delete: This is a button that has the function to Delete the mandatory per line
- Amount Start: This is the Range for the Employees Payroll Rate
- Amount End: This is the Range for the Employees Payroll Rate
- Employee Tax Percentage: Tax Percentage according to the Employees Payroll Range
- Employee Additional Amount: Additional Amount according to the employee's Payroll Range



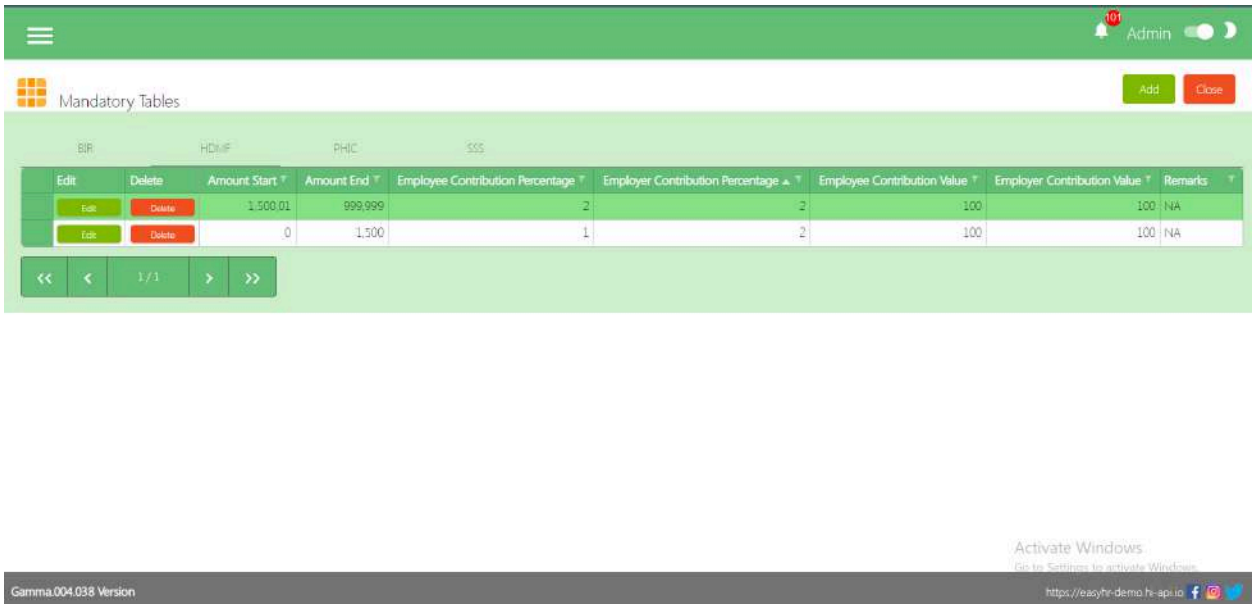
HDMF Mandatory

HDMF Mandatory is based on the Employee's Payroll Rate

Column Table

- Edit: This is a button that has the function to edit the mandatory per line
- Delete: This is a button that has the function to Delete the mandatory per line
- Amount Start: This is the Range for the Employees Payroll Rate

- Amount End: This is the Range for the Employees Payroll Rate
- Employee Contribution Percentage: Contribution Percentage according to the Employees Payroll Range
- Employer Contribution Percentage: Contribution Percentage according to the Employers Payroll Range
- Employee Contribution Value: Contribution Value according to the employees Payroll Range
- Employer Contribution Value: Contribution Value according to the employers Payroll Range
- Remarks: You can input any remarks



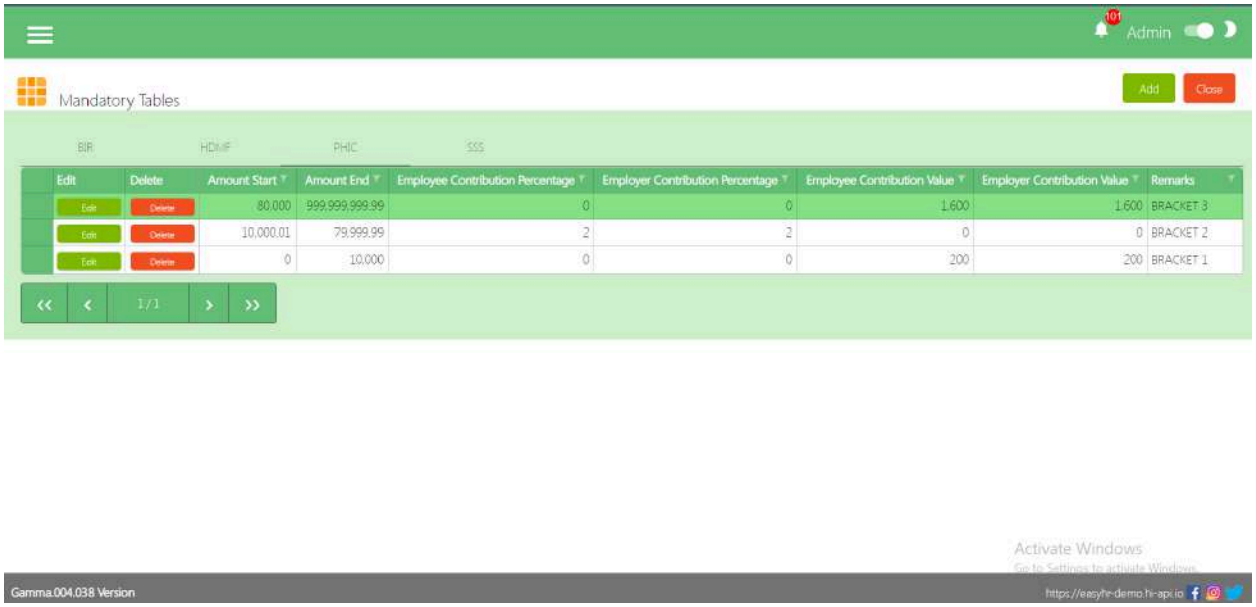
PHIC Mandatory

PHIC Mandatory is based on the Employee's Payroll Rate

Column Table

- Edit: This is a button that has the function to edit the mandatory per line
- Delete: This is a button that has the function to Delete the mandatory per line
- Amount Start: This is the Range for the Employees Payroll Rate
- Amount End: This is the Range for the Employees Payroll Rate
- Employee Contribution Percentage: Contribution Percentage according to the Employees Payroll Range

- Employer Contribution Percentage: Contribution Percentage according to the Employers Payroll Range
- Employee Contribution Value: Contribution Value according to the employees Payroll Range
- Employer Contribution Vaue: ontribution Value according to the employers Payroll Range
- Remarks: You can input any remarks

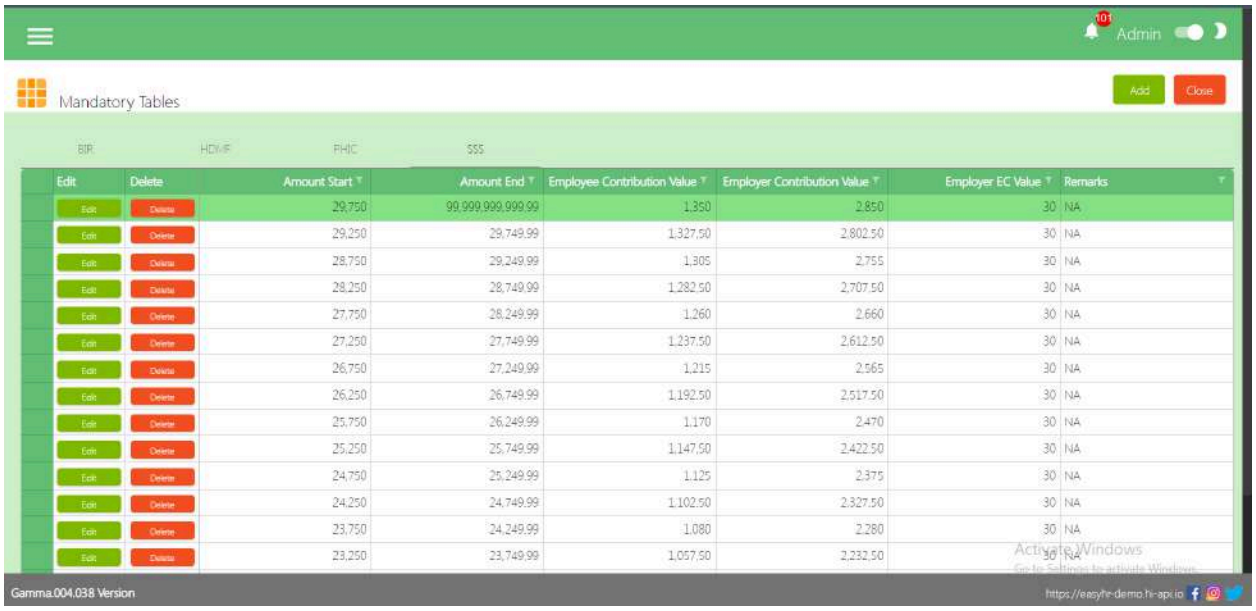


SSS Mandatory

SSS Mandatory is based on the Employee's Payroll Rate

Column Table

- Edit: This is a button that has the function to edit the mandatory per line
- Delete: This is a button that has the function to Delete the mandatory per line
- Amount Start: This is the Range for the Employees Payroll Rate
- Amount End: This is the Range for the Employees Payroll Rate
- Employee Contribution Value: Contribution Value according to the employees Payroll Range
- Employer Contribution Vaue: ontribution Value according to the employers Payroll Range
- Employer EC Value: This is also part of the Employers Contribution
- Remarks: You can input any remarks



Shift

Overview

- Shift setup is used for Shift schedule for employees and also the user can add more shift base in company shift schedule.

Shift Code List

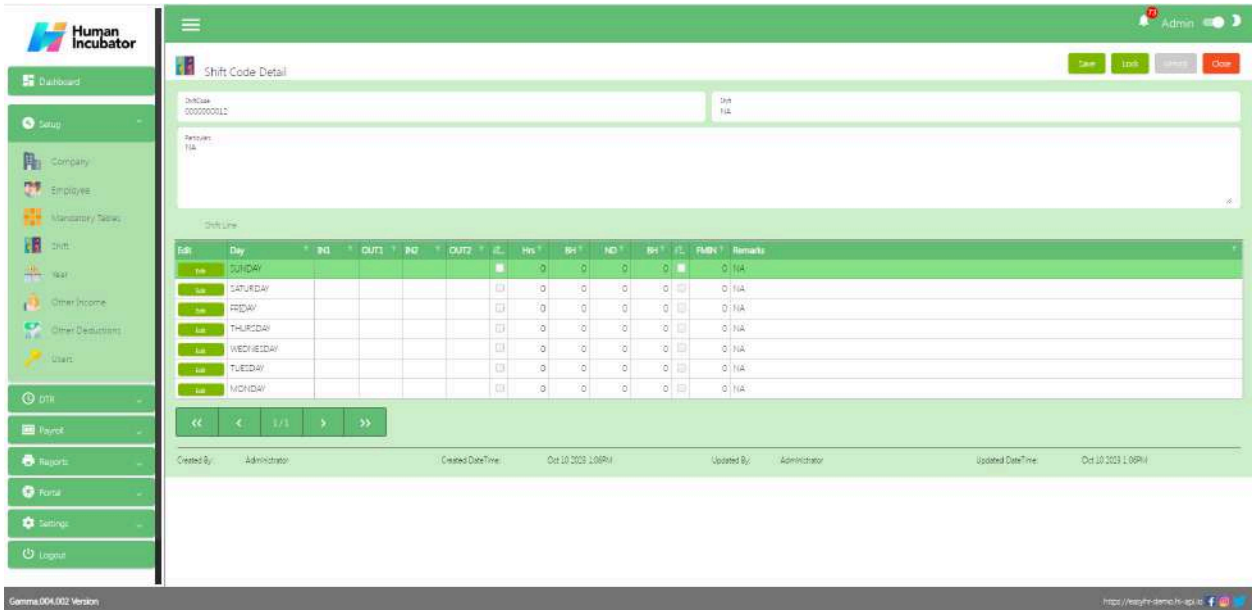
- Shows all list of shift schedule

Column Table:

- Edit: This has a function to Edit the Shift
- Delete: This has a function to Delete the Shift
- Code: This code will automatically generate according to the sequence of the added shift
- Shift: The name of the shift
- Particulars: in the Particulars this is just like the remarks you can input any details
- Locked: If the Checkbox is checked then it is locked but if uncheck then it is unlocked. (Note: If the Shift is unlocked it will not show in the other module)

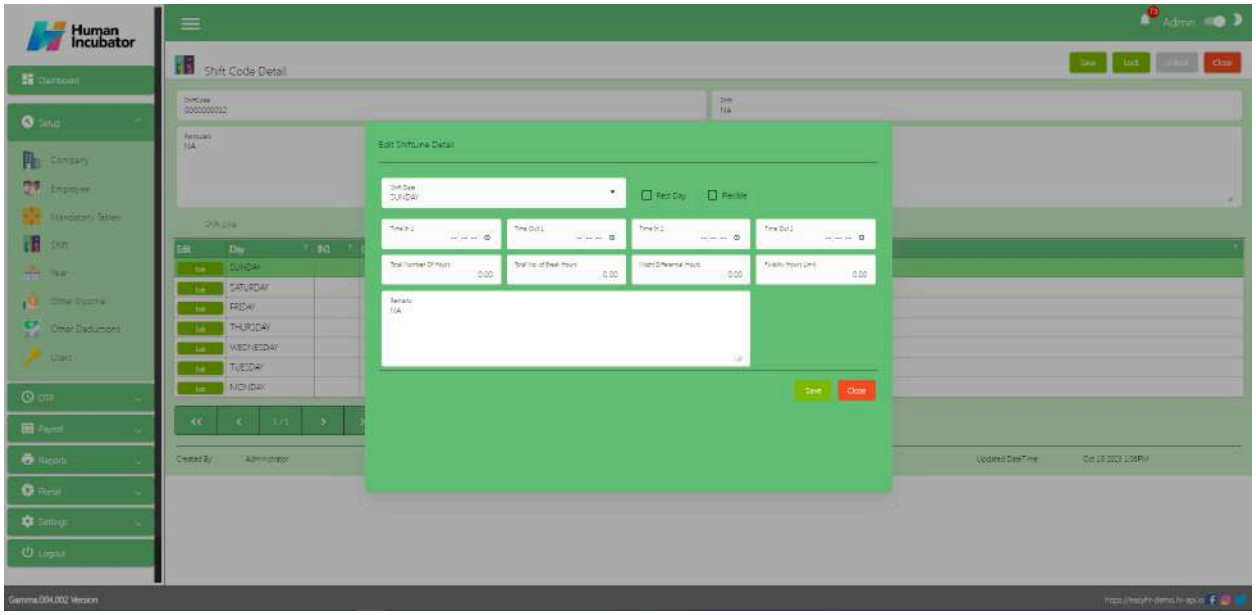
Shift Code Detail

- **Assumption**: To **Add** a new shift, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields for Shift Code Detail like:
    - Shift
    - Particulars



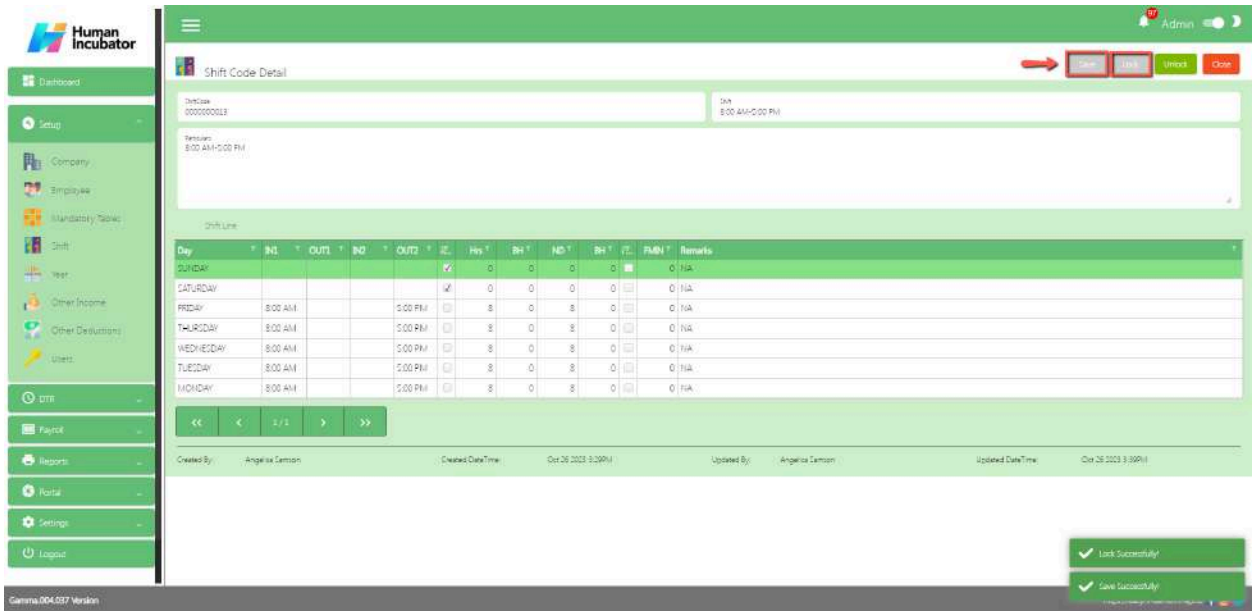
Shift Line

- In **Shift line** the user need to click **Edit** to set the shift schedule of the employee (**Edit** Sunday to Monday and set the Rest Day of employee)
    - Input the **Time In 1** hour and **Time Out 2**
    - Input the Total Number of Hours
    - Input the Total Number of break Hours
    - Input the Night Differential Hours if necessary
    - Input the Fix Hours Limit if necessary
    - Remarks
    - Click **Save** button to add in table



Save/Lock

- Make sure to save/lock the record so that in every transaction the Shift will show.



Year

Overview

- Year setup is used for setting up a holiday in that particular year and also to Add leave credits per employee.
  Note: Always make sure the current Year is locked.

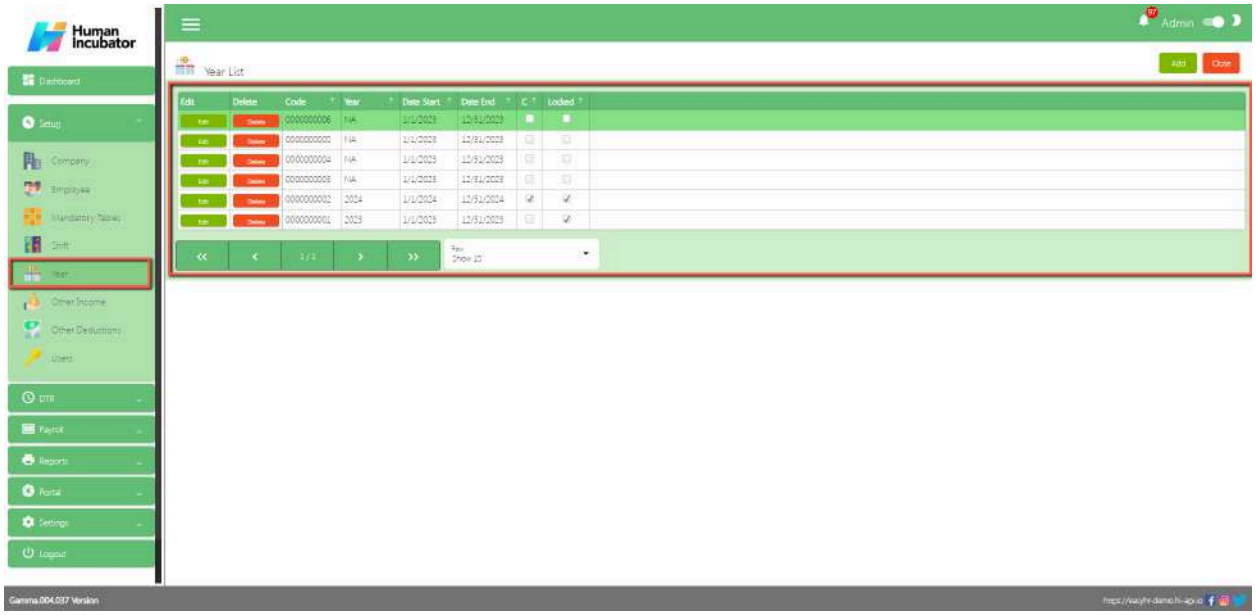
Year List

- Shows all list of year

Column Table

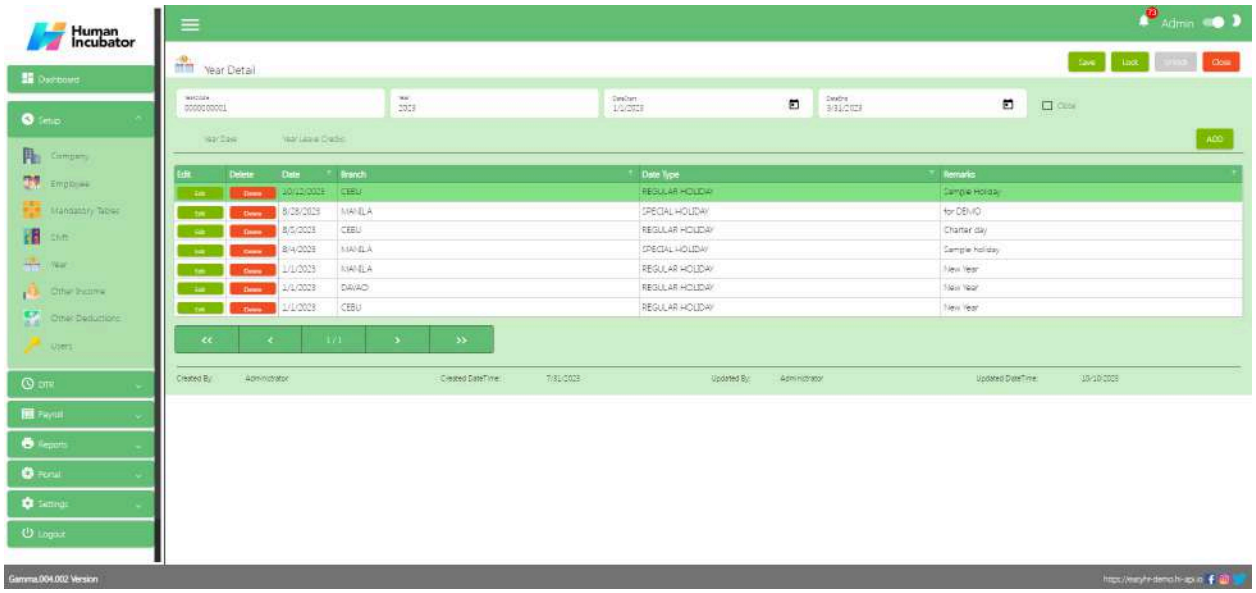
- Edit: This has the function to edit the Year
- Delete: This has a function to delete the Year
- Code: This code will automatically generate according to the sequence of the added shift
- Year: The is an input on what year added

- Date Start: Date Start of the Year
- Date End: Date End of the Year
- Closed: You can no longer select if the year is closed.



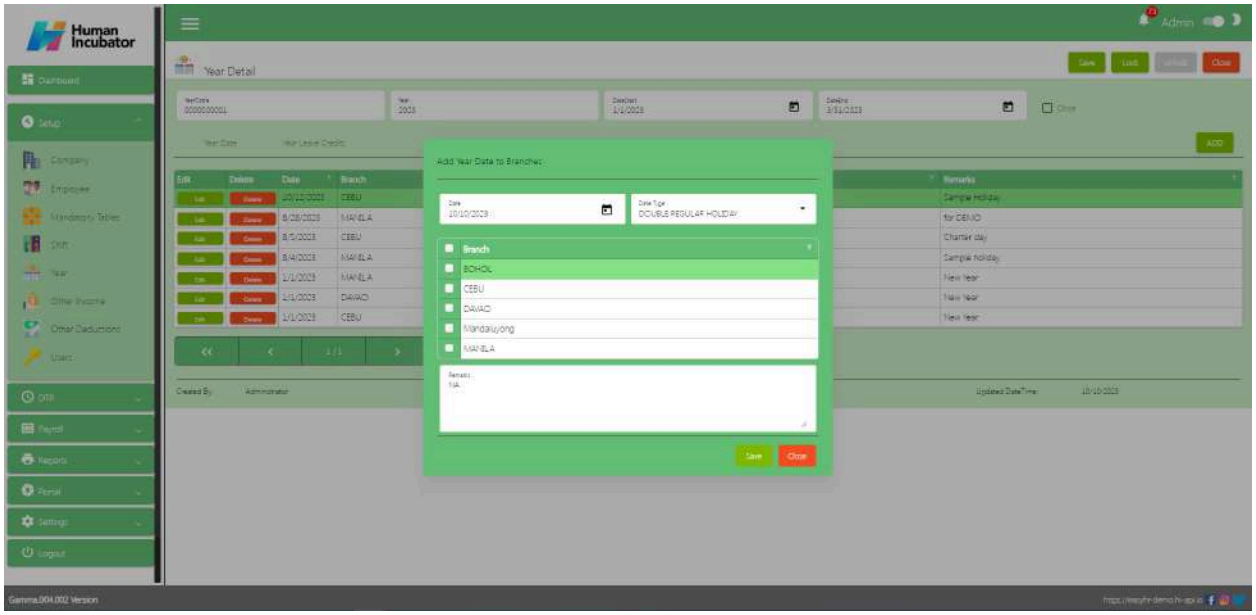
Year Detail

- **Assumption**: To **Add** a new year, click the **Add** button that can be seen on the right side of the screen
- There are 2 tabs that show in year detail
    - Year Date
    - Year Leave Credits
- Fill all the important fields for Year Detail like:
    - Year
    - Select Date Start
    - Select Date End



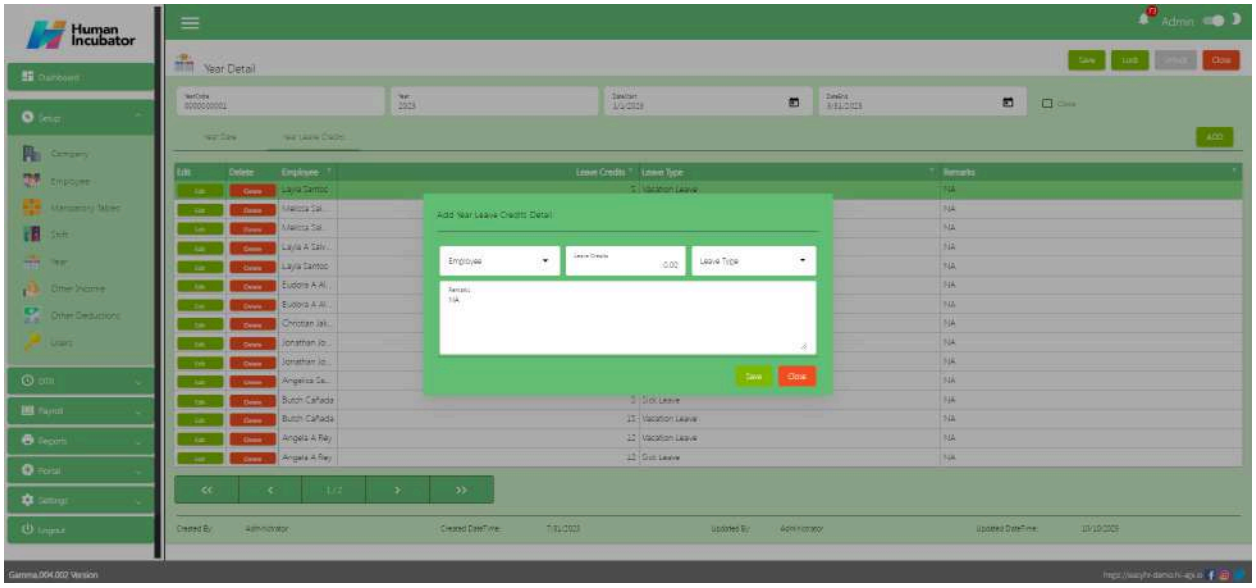
Year Date

- In **Year Date** tab the user can **Add** all the regular holiday in that particular year
    - Click **Add** button
    - Select Date
    - Select Date Type
    - Select Branch
    - Input remarks
    - Click **Save** button to **Add** in table



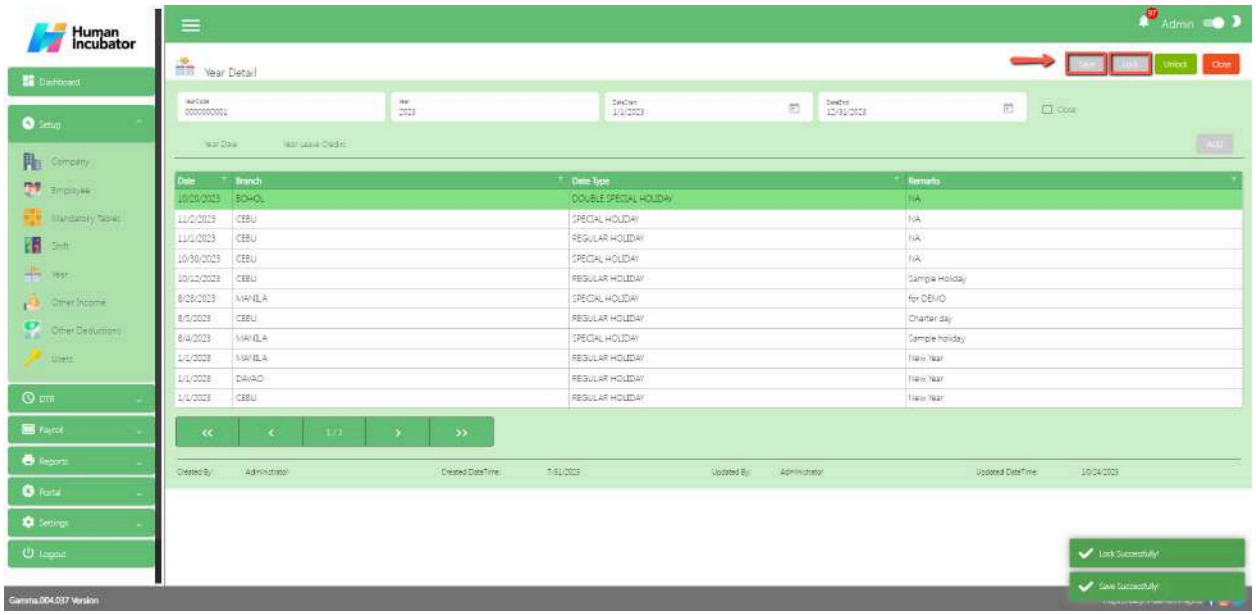
Year Leave Credits

- In **Year Leave Credits** tab the user can add the leave credits per employee
    - Click **Add** button
    - Select Employee, Input leave credits and Select Leave Type
    - Remarks
    - Click Save button to **Add** in table



Save/Lock

- Make sure to save/lock the record so that in every transaction the Year details will show.



Other Income

Overview

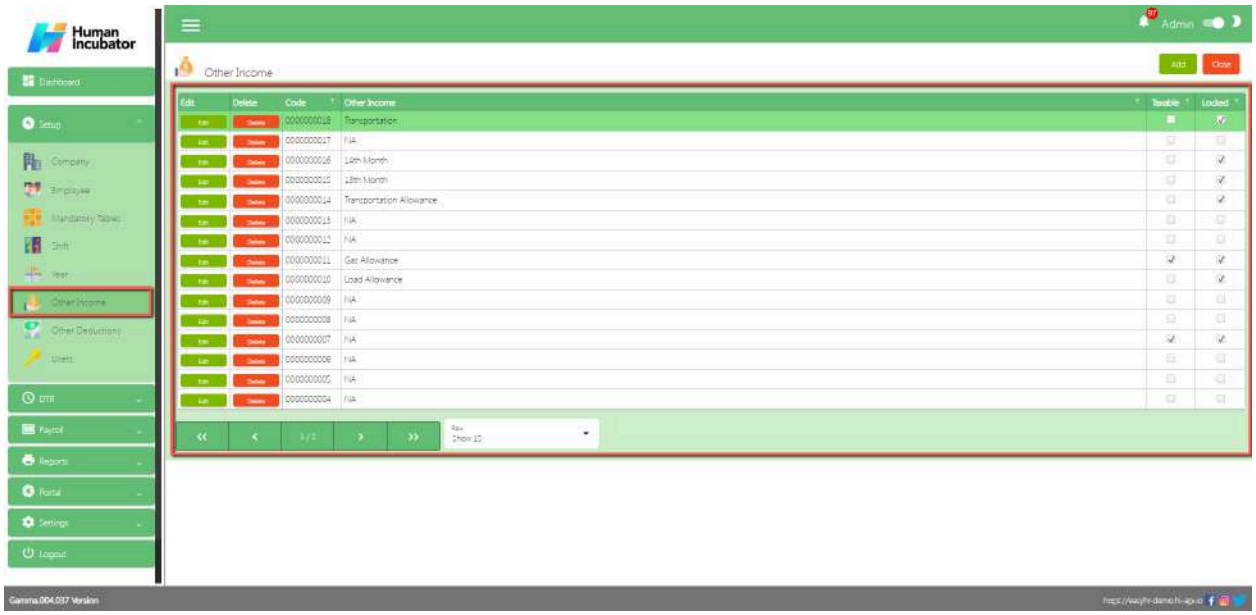
- Other Income setup is used for Making other income just like allowances of the company and also can add if Taxable or Non-taxable

Other Income List

- Shows all list of Other Income

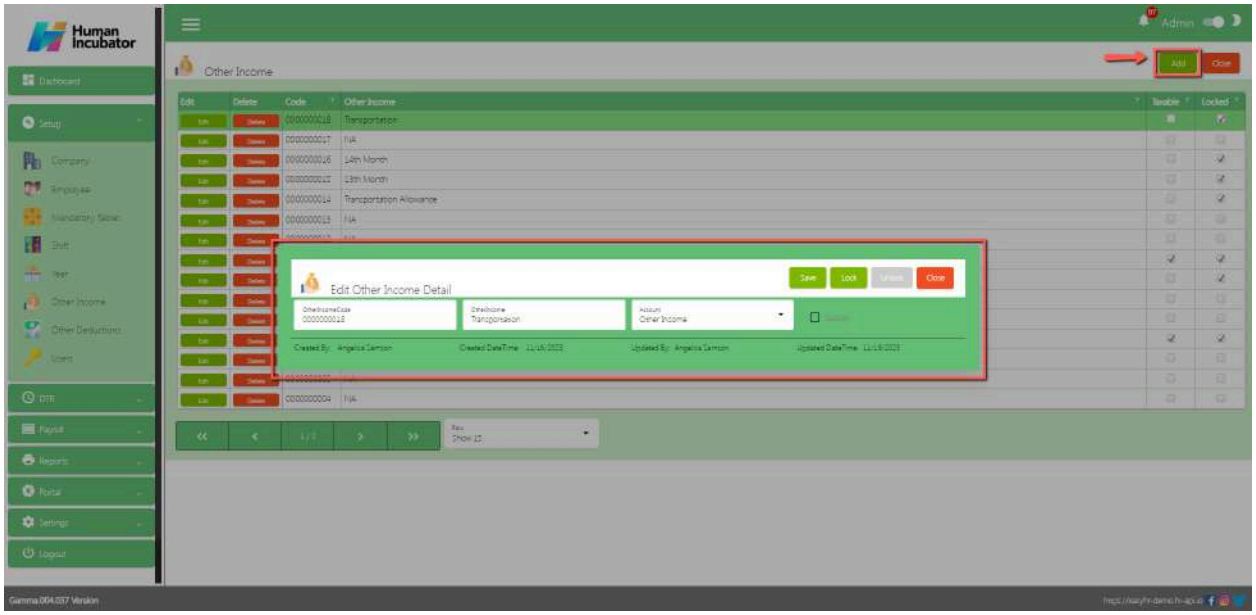
Table Column

- Edit: This has the function to edit the Other Income
- Delete: This has the function to Delete the Other Income
- Other Income: Name of the Other Income
- Taxable: Check if the Other Income is taxable, uncheck if not
- Locked: If locked you can now select this type of other income



Other Income Detail

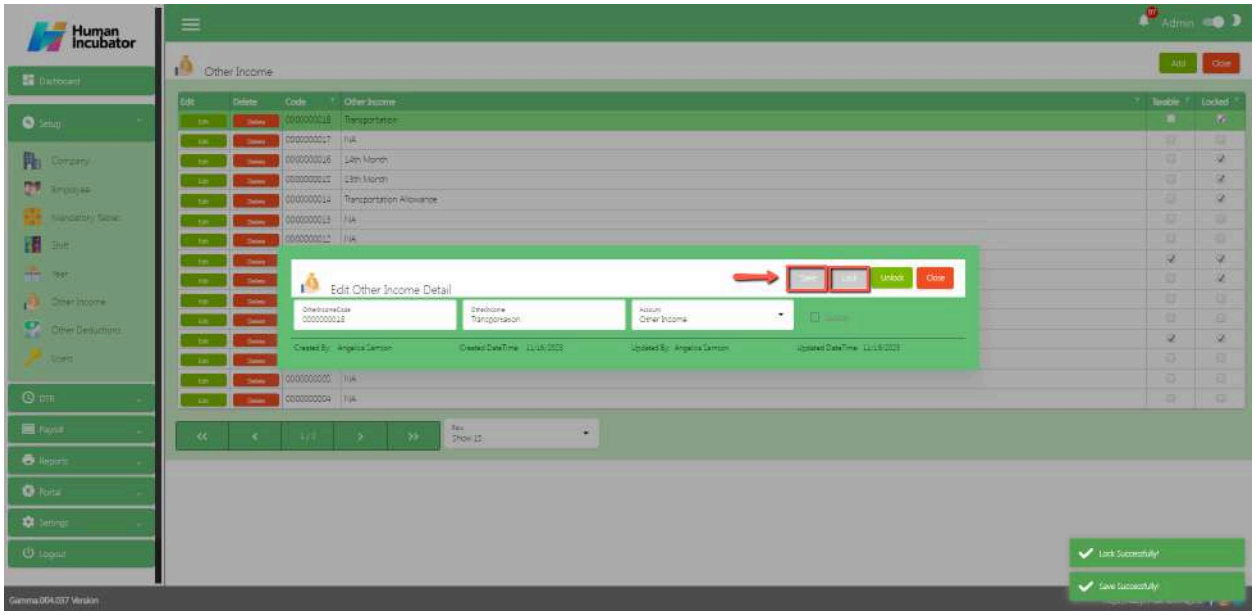
- **Assumption**: To **Add** a new other income, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Other Income detail like:
    - Input Other Income name
    - Select Other Income account
    - Check the **Check Box** if taxable or non-taxable



Save/Lock

- Make sure to save/lock the record so that in every transaction

the Other Income will show.



Other Deductions

Overview

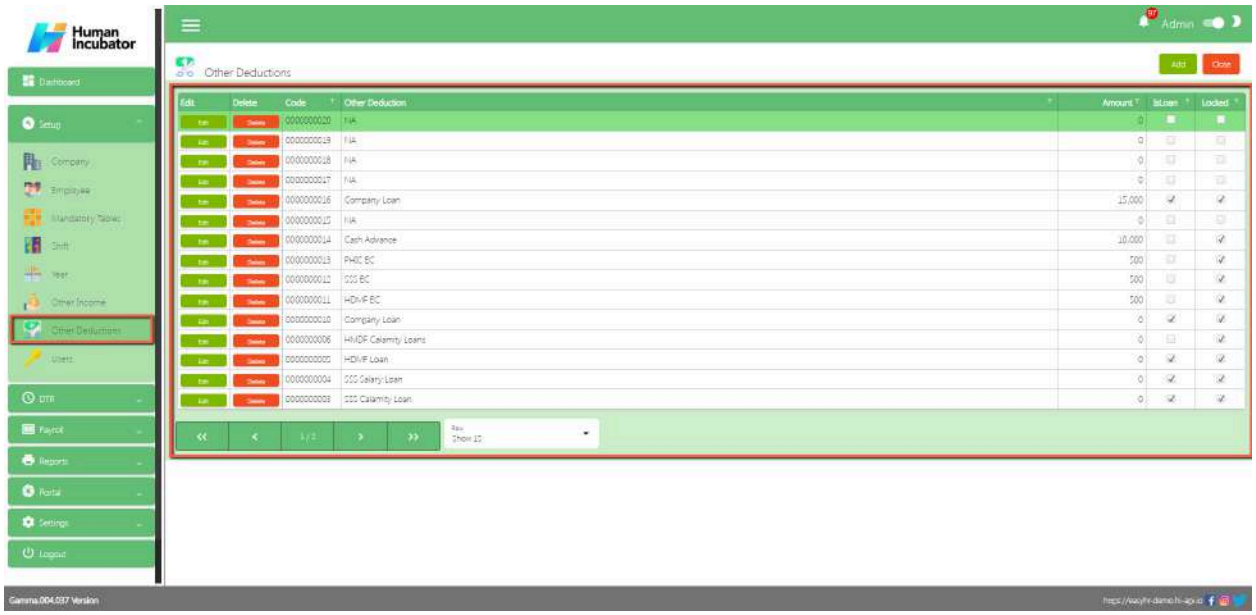
- Other Deductions setup is used for making other deductions just like Salary loans and all loans in company.

Other Deductions List

- Shows all list of Other Deductions

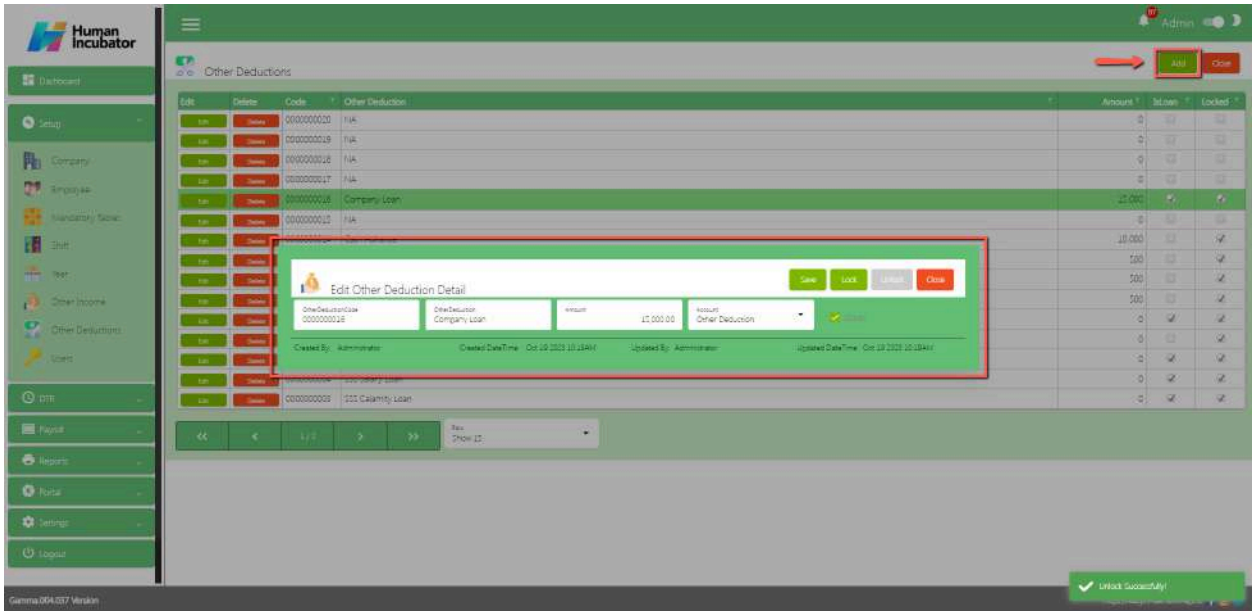
Other Deductions

- Edit:This has the function to edit the Other Deductions
- Delete: This has the function to Delete the Other Deductions
- Other Deduction: Name of the Other Deduction
- Amount: This is optional you can either put and amout or not
- IsLoan: Check if this Other Deduction is a Loan Type
- Locked: If locked you can now select this type of Other Deduction



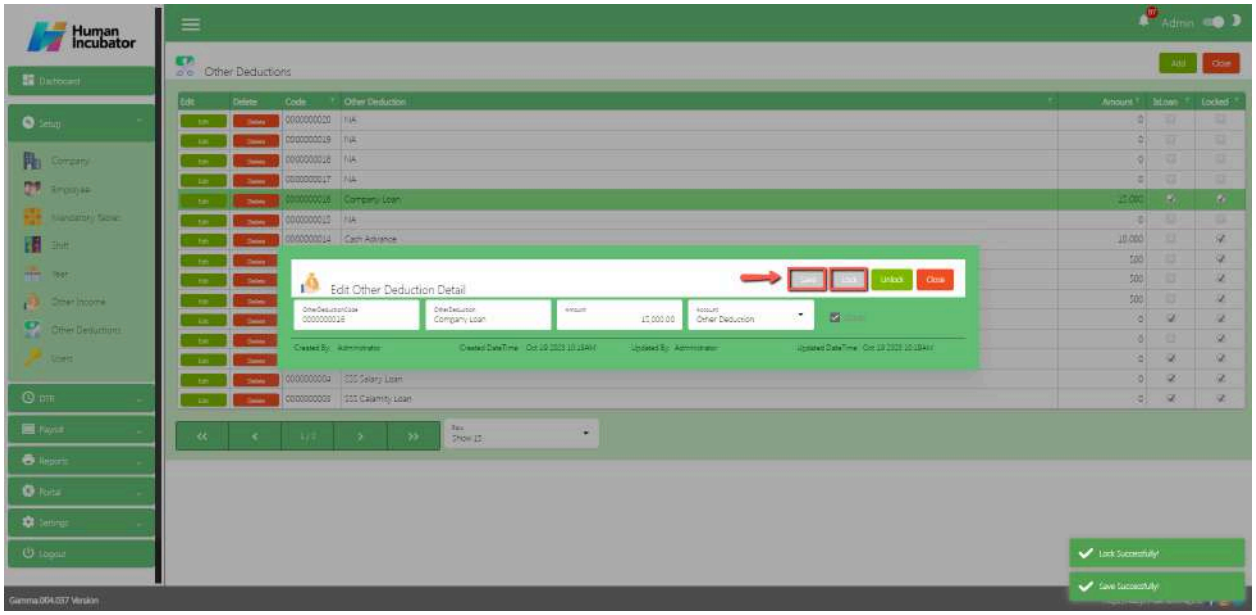
Other Deductions Detail

- To **Add** a new other deductions, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Other Deductions detail like:
    - Input Other Deductions name
    - Input Amount *Note: Input amount is optional*
    - Select Other Deductions account
    - Check the **Check Box** if **IsLoan**



Save/Lock

- Make sure to save/lock the record so that in every transaction the Other Deductions will show. (Note: There should be at least 1 other deduction that is locked so that you can add a loan)



Users

Overview

- Users setup is used for making the credentials of employees, user rights and also can upload more users.

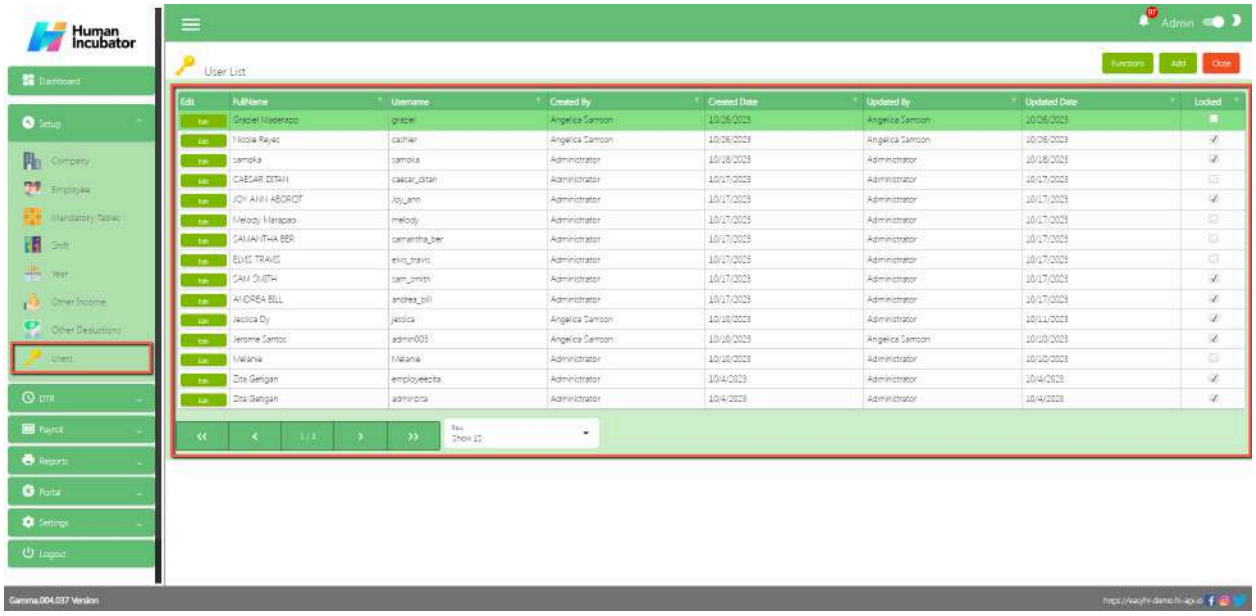
User list

- Shows all list of Users

Table Column

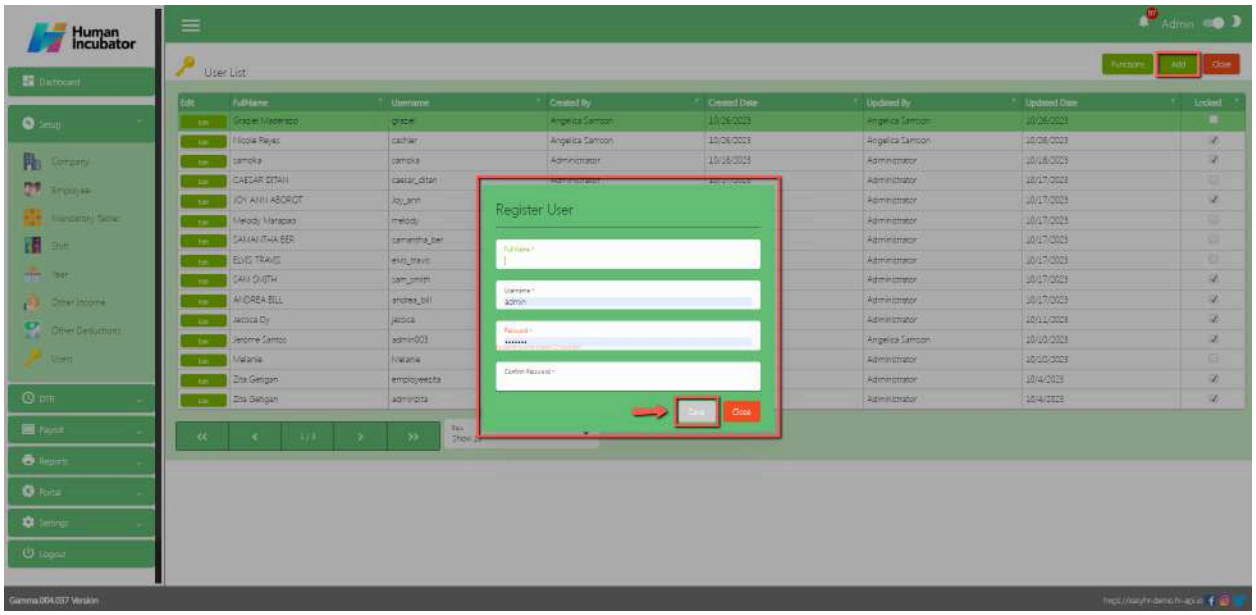
- Edit: This has the function to edit the User
- FullName: Fullname of the user
- Username: Username of the user
- Created By: Fullname of the login user who created the user
- Created Date: Creation date of the user
- Updated By: Fullname of the login user who updated the user
- Updated Date: Updated date of the user

- Locked: If it is already locked you can now login the account.



Register User

- To **Add** a new user, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Register User like:
    - Input Full Name
    - Input Username
    - Input Password *Note: Password must require Uppercase, Lowercase, Numbers, Special characters except (=+_-?/{}][\|) and also must be at least 12 characters.*
    - Confirm Password
    - Click **Save** button to add in table

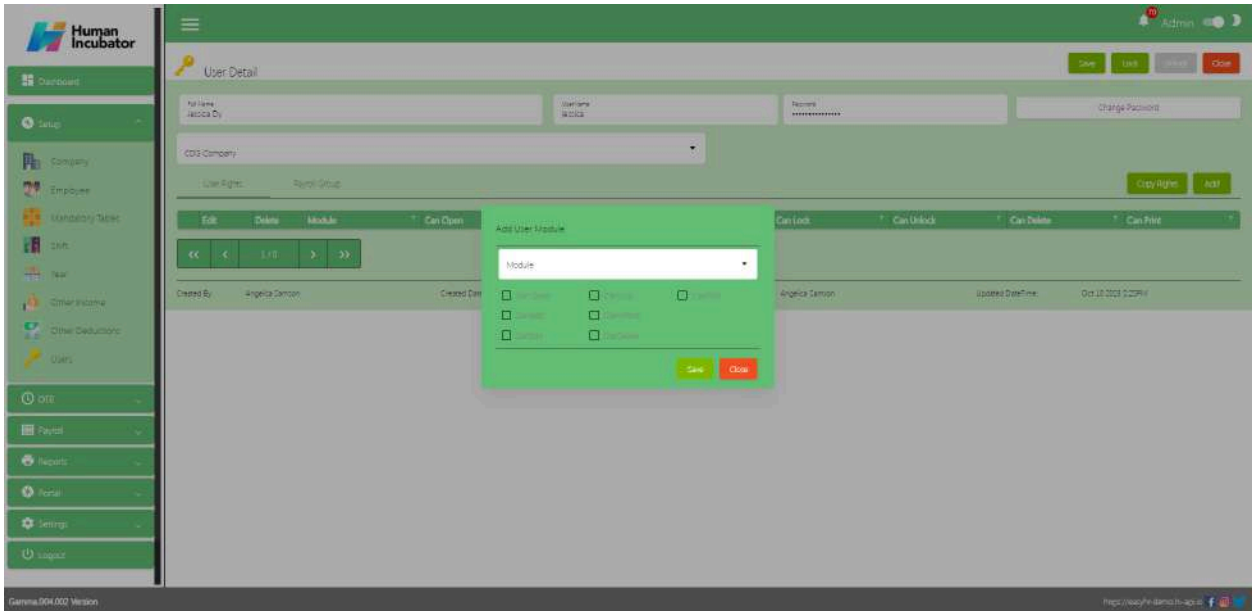


User Detail

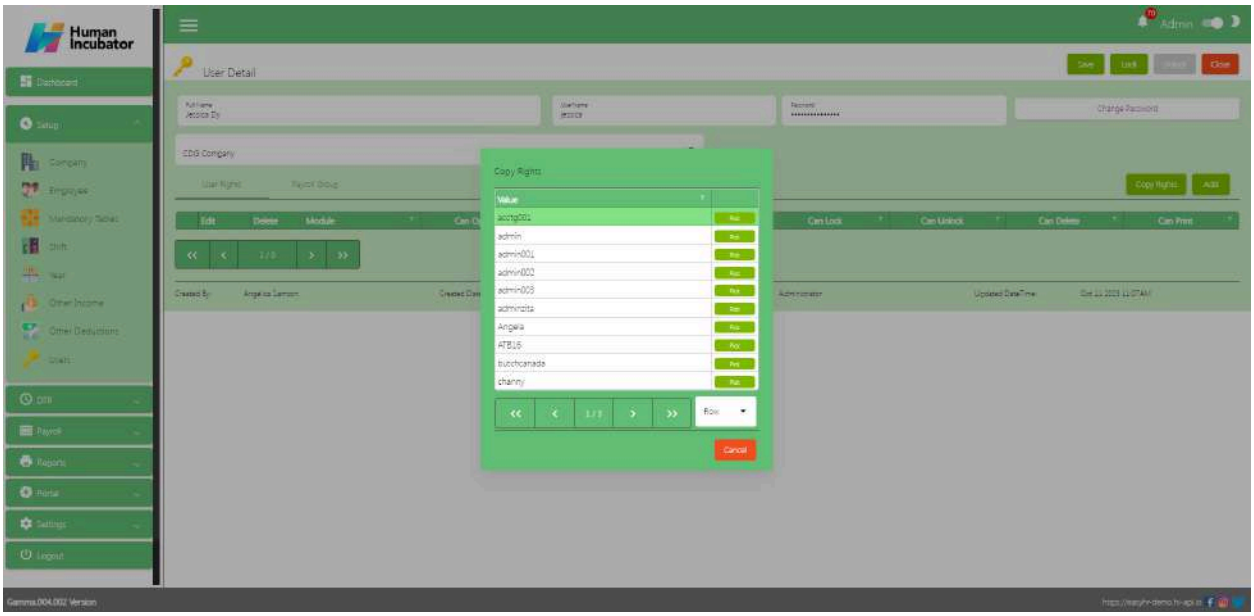
- Click **Edit** button to add the user rights of employee
- There are 2 tabs in user detail
    - User Rights and Payroll Group

User Rights

- Click **Add** button to add the user rights what module to access
    - Select **Module**
    - Check the **Check Box**
    - Click **Save** button to add in table

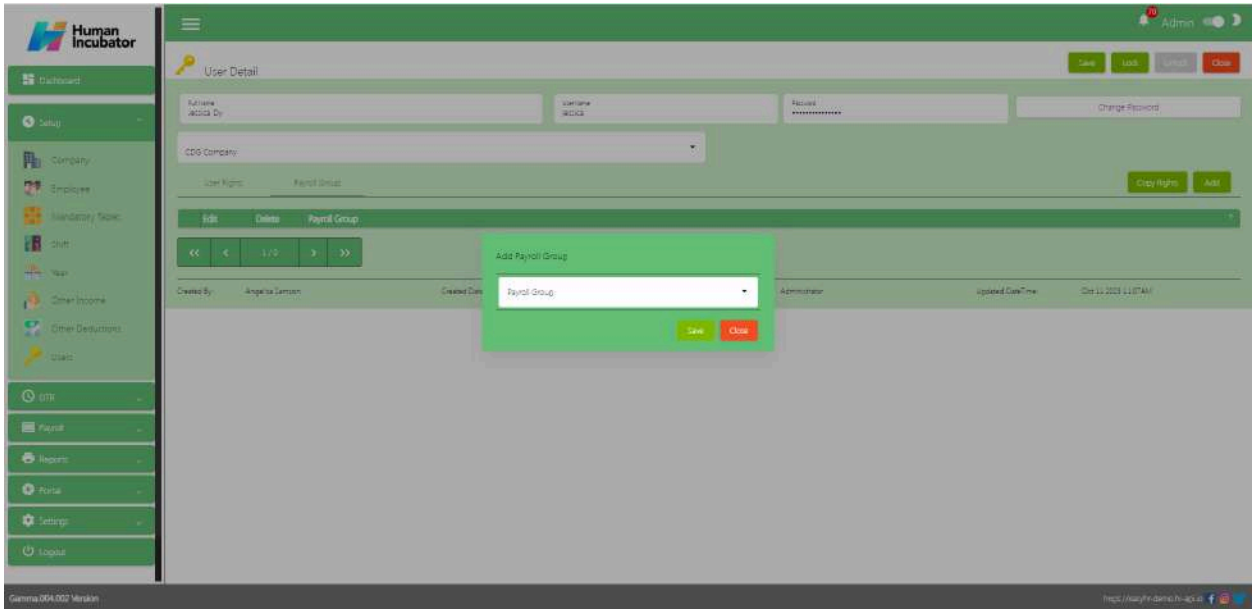


- Click **Copy Rights** button to copy the rights of employee
    - Select the User need to copy rights
    - Click **Pick** button to add in table



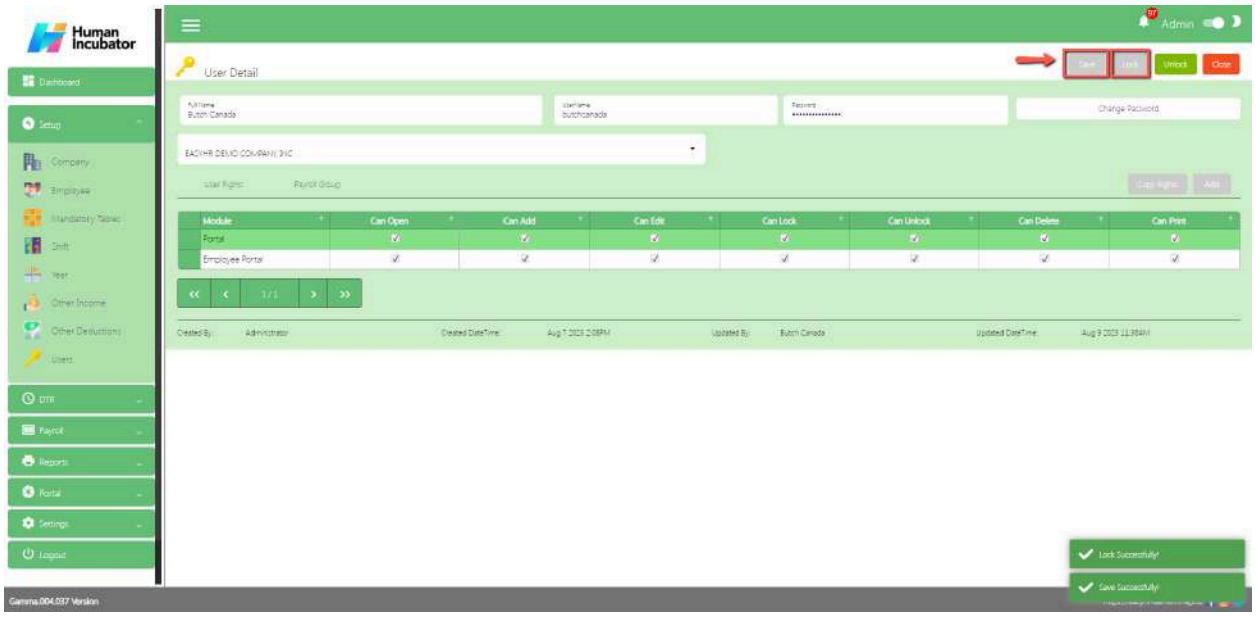
Payroll Group

- Click **Add** button to add what payroll group to access
    - Select Payroll Group
    - Click **Save** button to add in table


Human Incubator
Admin
User Detail
Add Payroll Group
Payroll Group
Save
Close

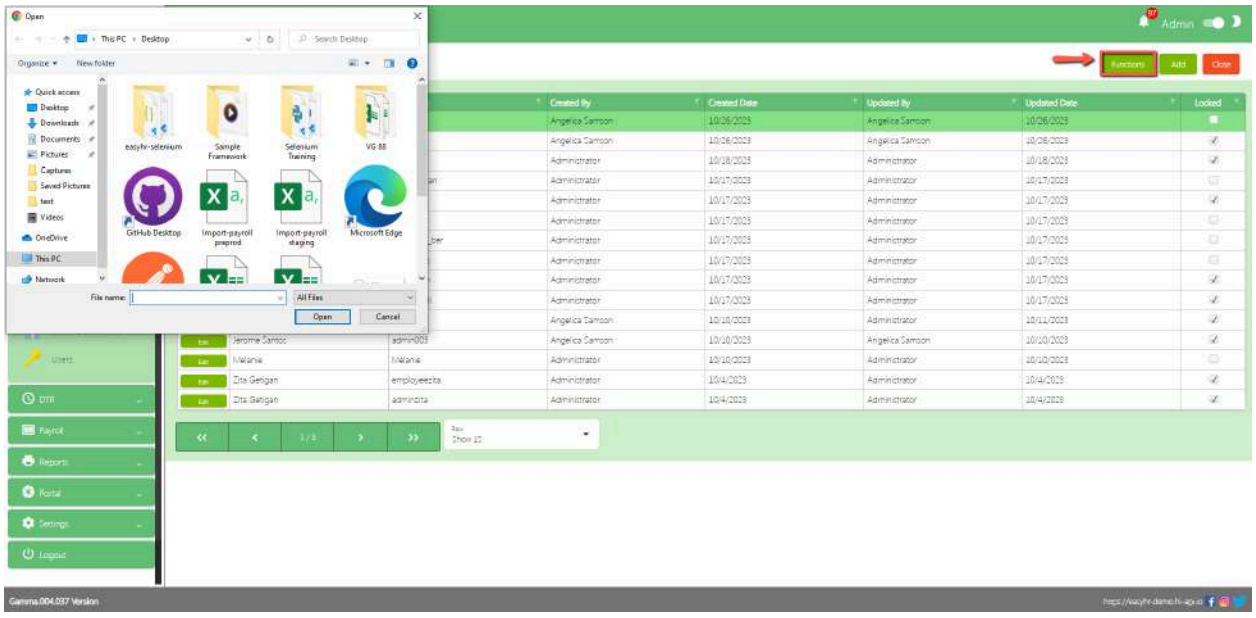
Save/Lock

- Make sure to save/lock the record so that it can access the user every transaction.
- Click **Close** button to go back in User List

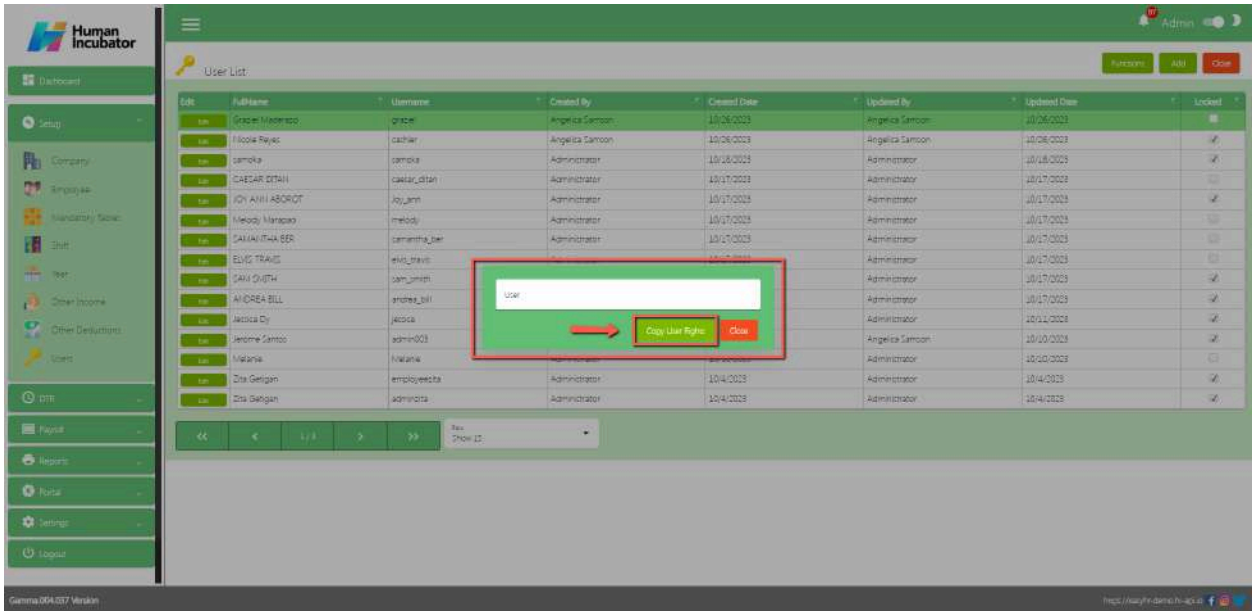


Upload User

- To **Upload User**, click **Functions** button that can be seen on the right side of the screen
    - Click **Upload User** to select master file and click **Open**



- Select **User** and Click **Copy User Rights** button to copy the rights for the previous User
    - Uploading Master file Successfully
    - File uploaded add to table

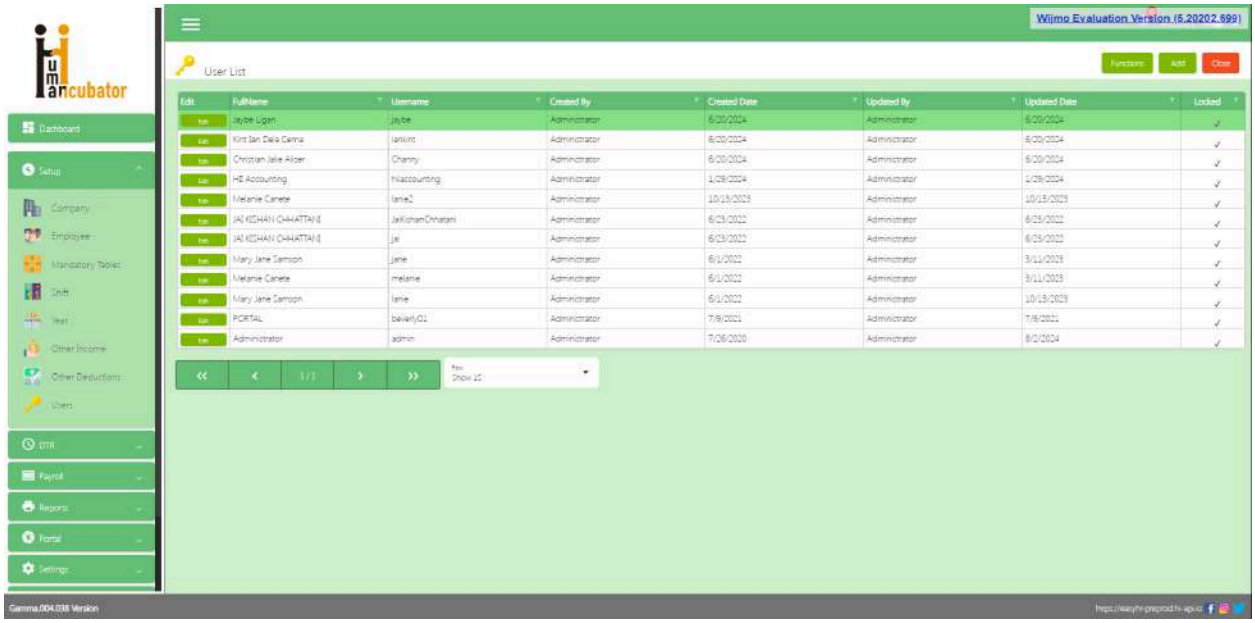


Rostering

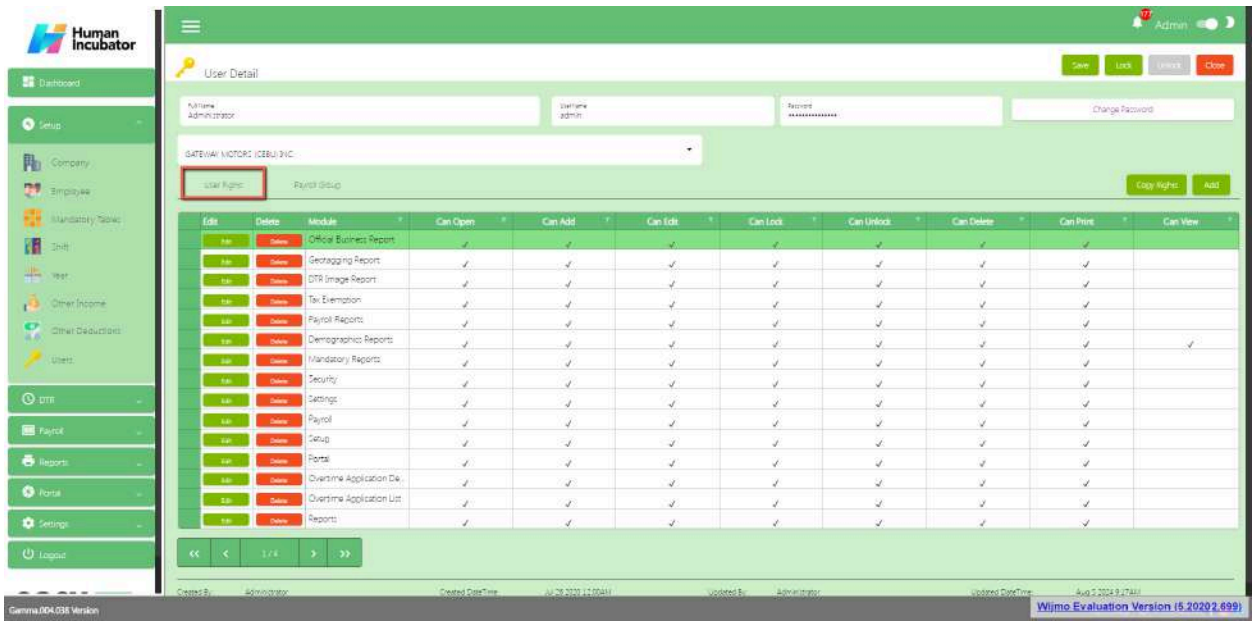
Steps

1. In the Setup module click Users

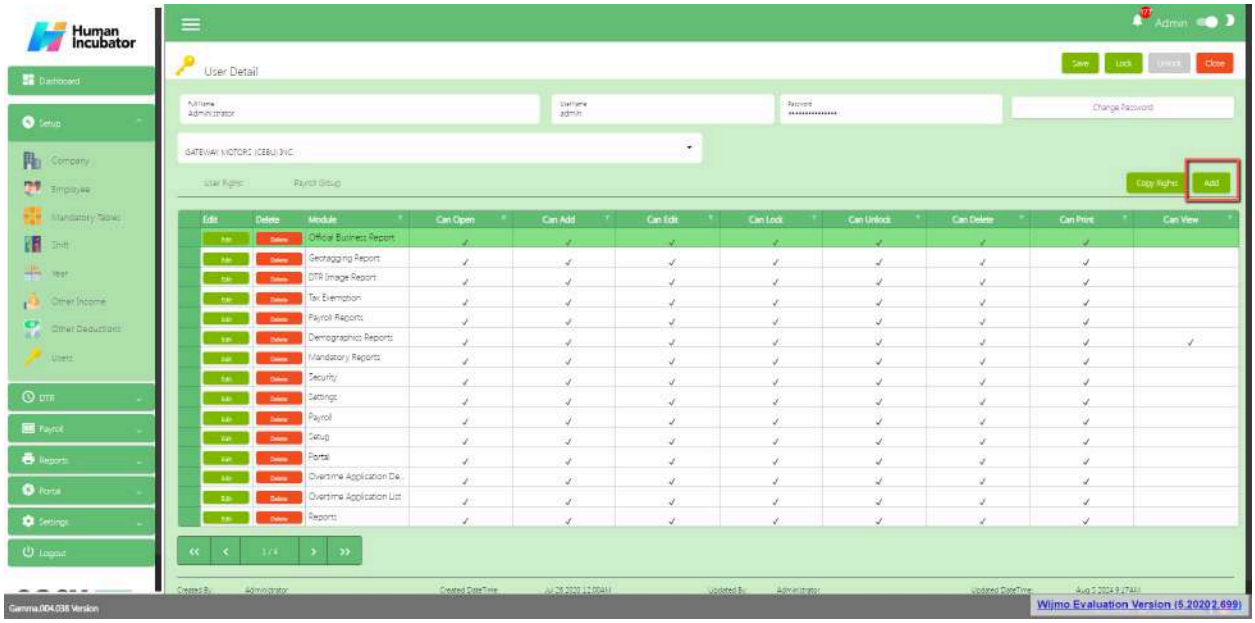
2. Edit User



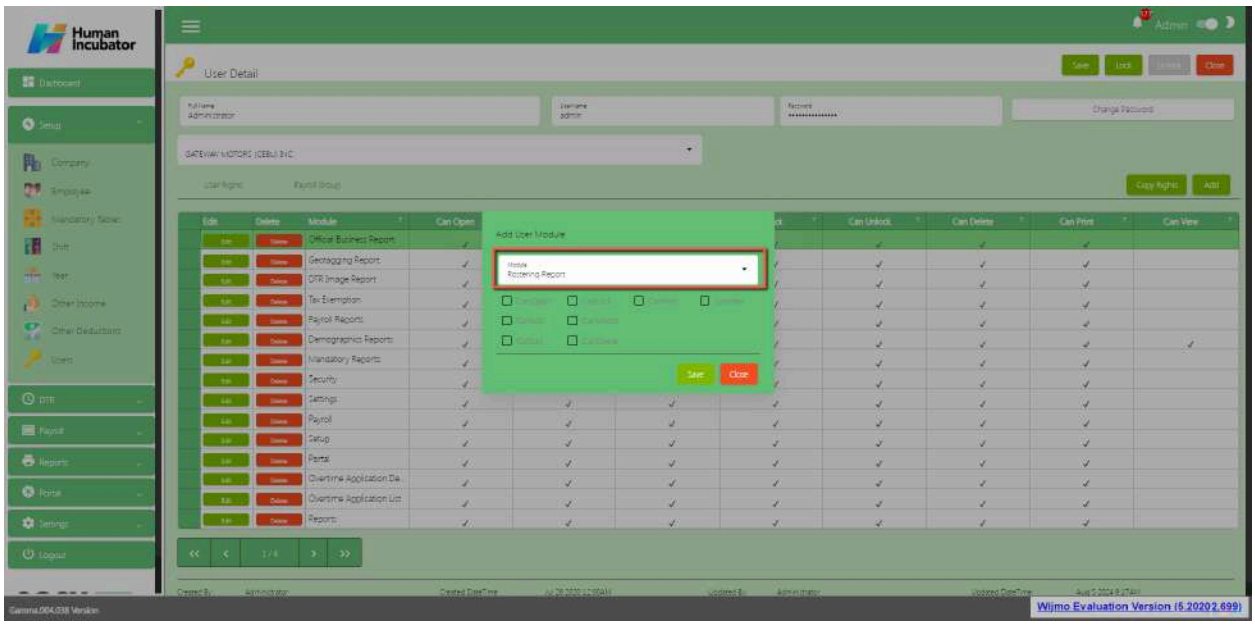
3. Go to the User Rights Tab



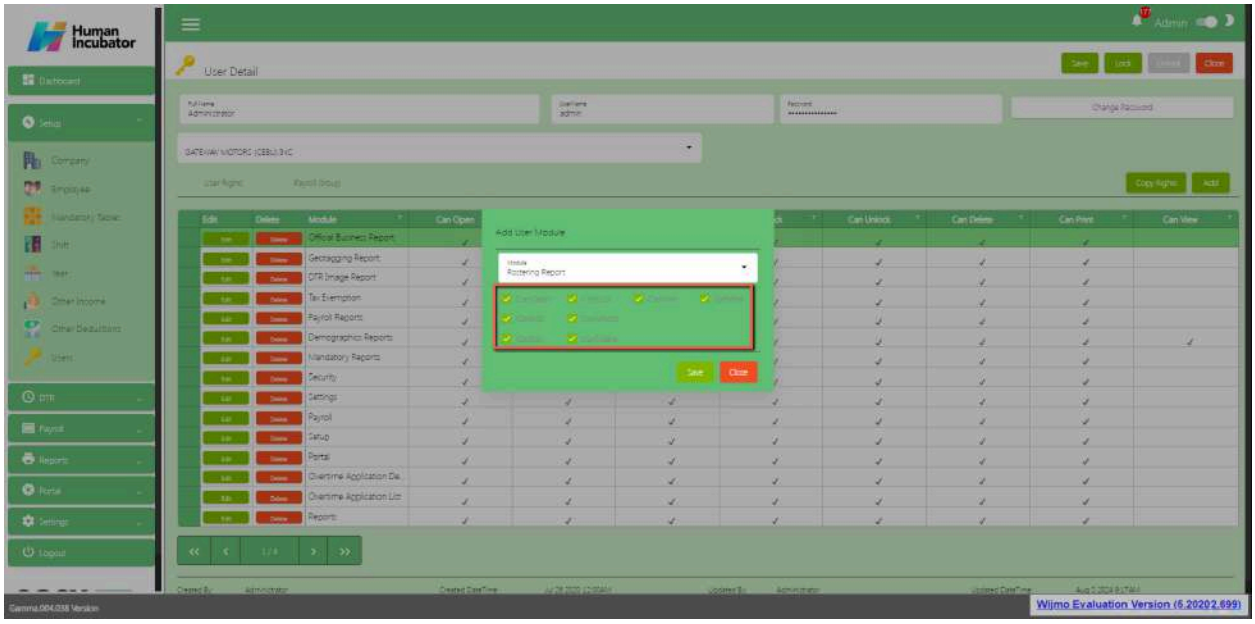
4. Click Add



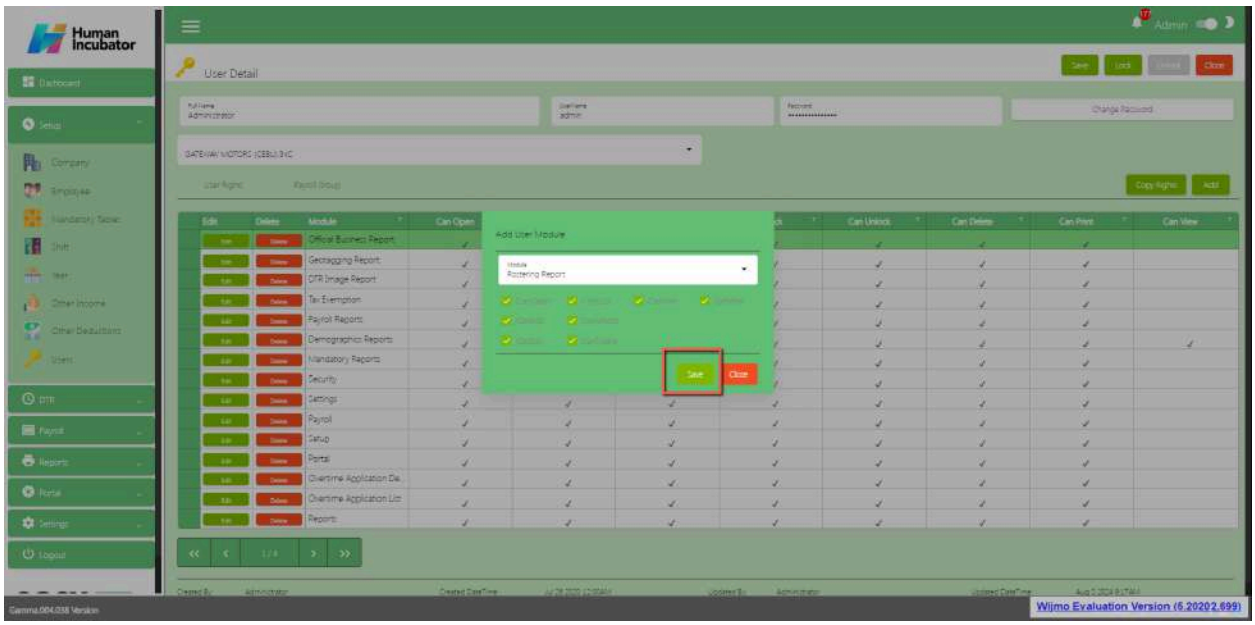
5. Select Rostering Report



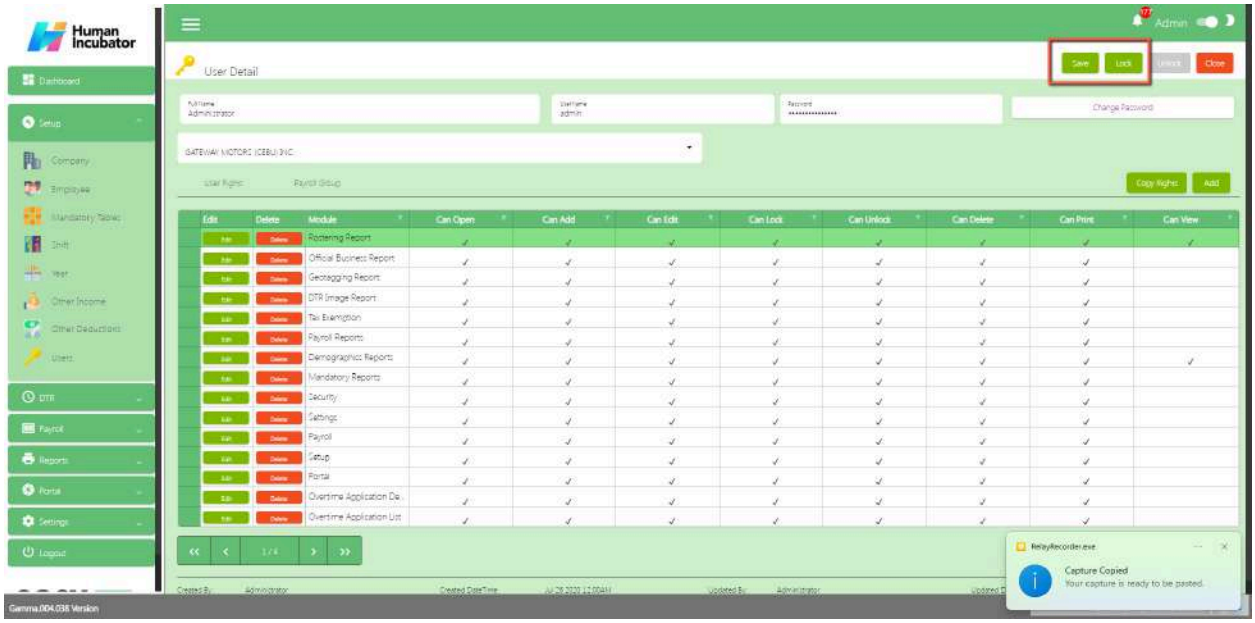
6. Click Rights Can Open, Can Add, Can Edit, Can Lock, Can Lock, Can Unlock, Can Print and Can View



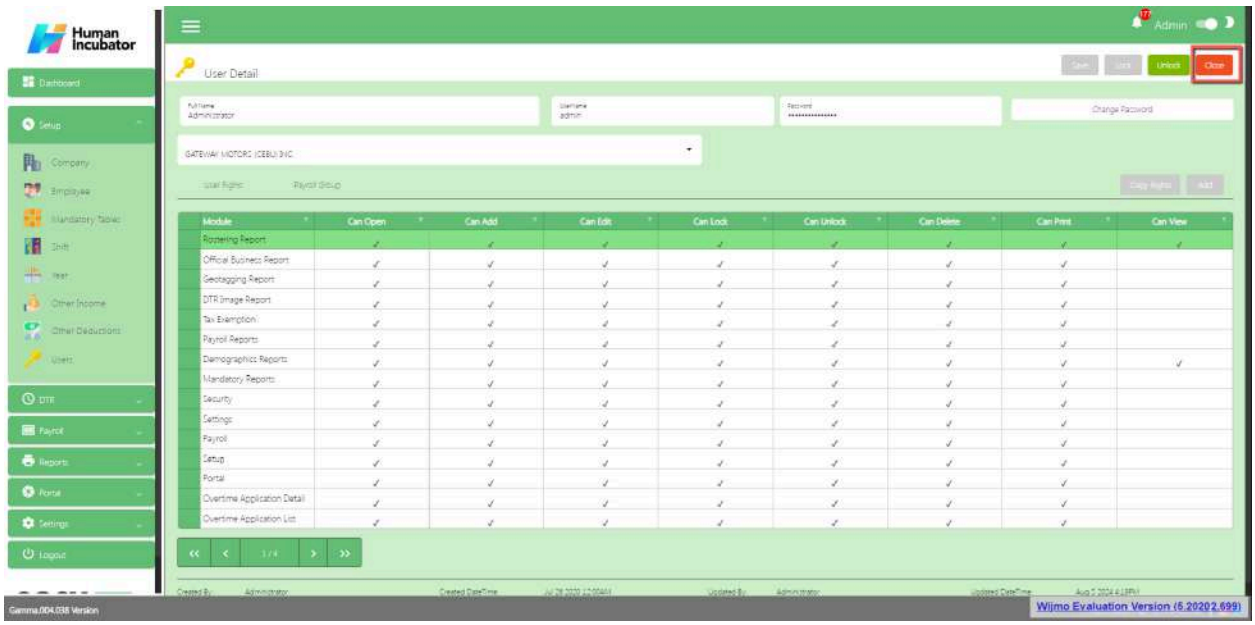
7. Click Save



8. Click Save and Lock



9. Click Close



Section V: DTR

Change Shift

Overview

- Change shift is used for setup a start date and end date per cut-off and also the user can approve if the employee filed a change shift
- The user file change shift in employee portal it is automatically seen by approver or admin

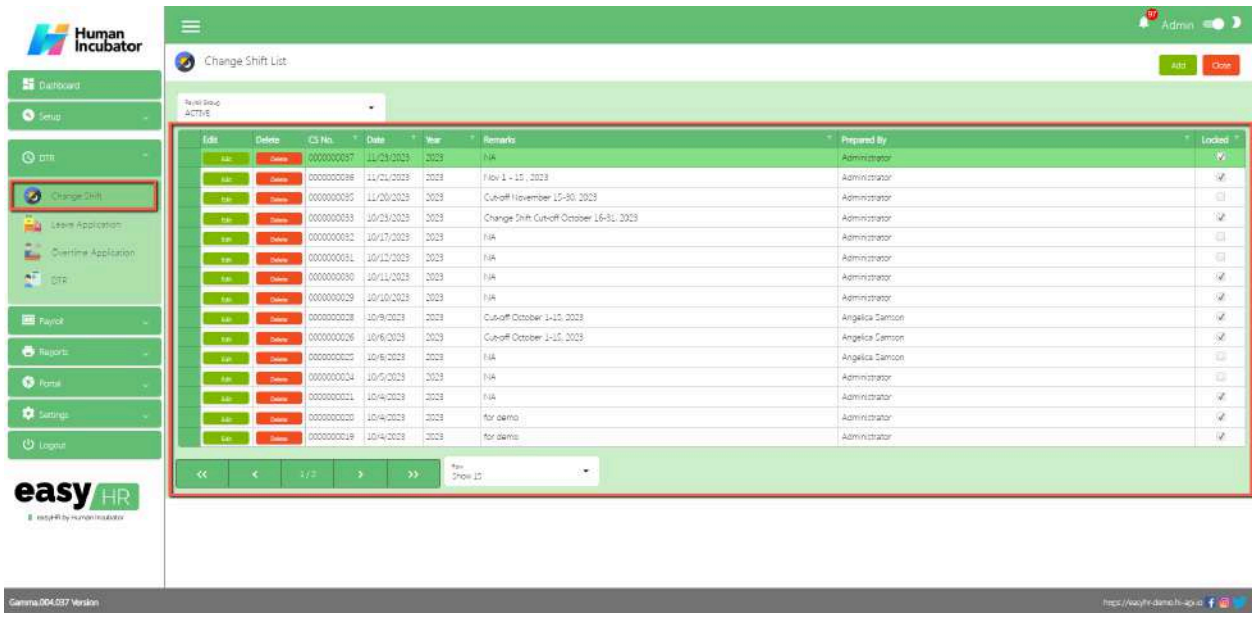
Change shift List

- Shows all list of Change Shift setup per cut off
- Select Payroll Group

Table Column

- Edit: This has a function to edit the Change Shift
- Delete: This has a function to Delete the Change Shift (Note: You will not be able to delete the Change Shift if it has still a Change Shift lines or the DTR connected is already locked)

- CS No.: This for the Change Shift number (Note: It will automatically generate according to the sequence of the added Change Shift)
- Date: Date of the Change Shift created
- Year: This is for the Year
- Remarks: You can input any remarks
- Prepared By: This is for the name of the login user who prepared the change shift
- Locked: If the change shift is locked you can select it for the DTR



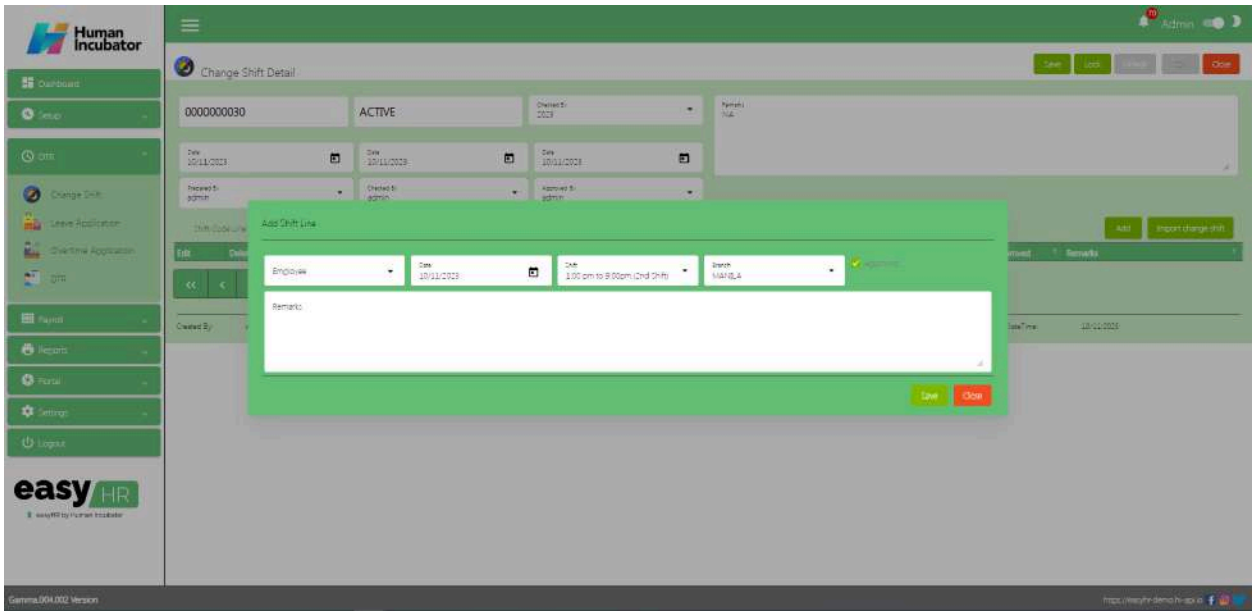
Change Shift Detail

- To **Add** a new change shift detail, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Change Shift detail like:
    - Select Date Start
    - Select Date End
    - Input Remarks
    - Select Prepared By
    - Select Check By
    - Select Approved By

Note: Do not Save and Lock so that this shift code seen in employee portal

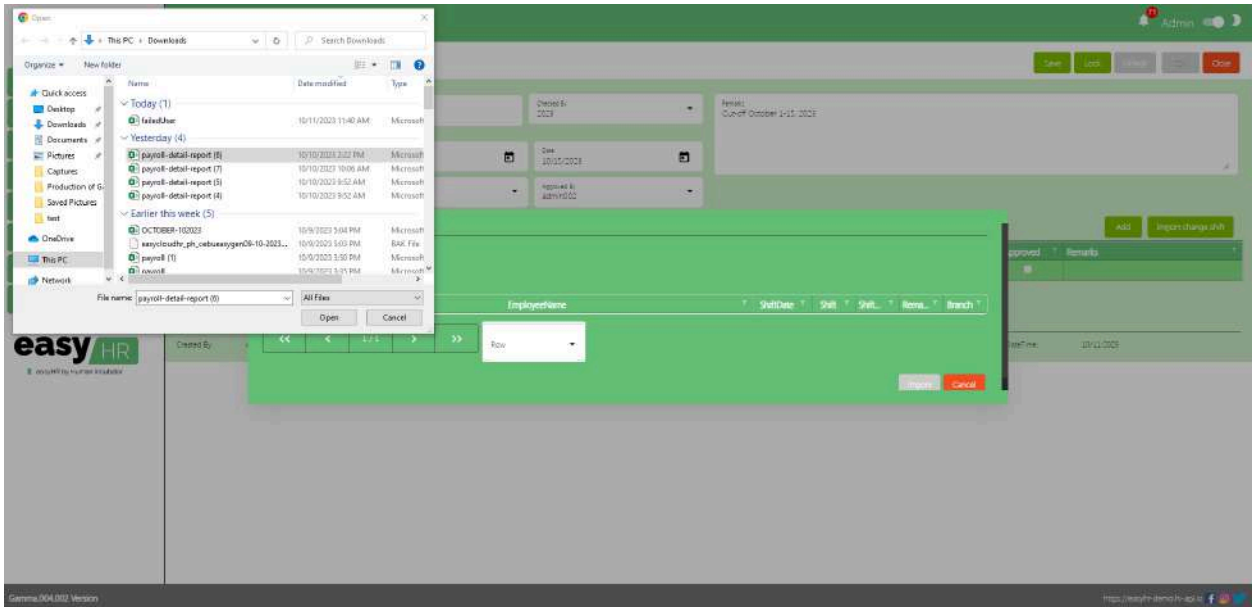
Add Change Shift Manually

- Click **Add** button to add manually change shift of employee
- Fill all the important fields Shift line like:
    - Select Employee
    - Select Date
    - Select Shift
    - Select Branch
    - Check Approved
    - Input Remarks
    - Click **Save** button to add in table

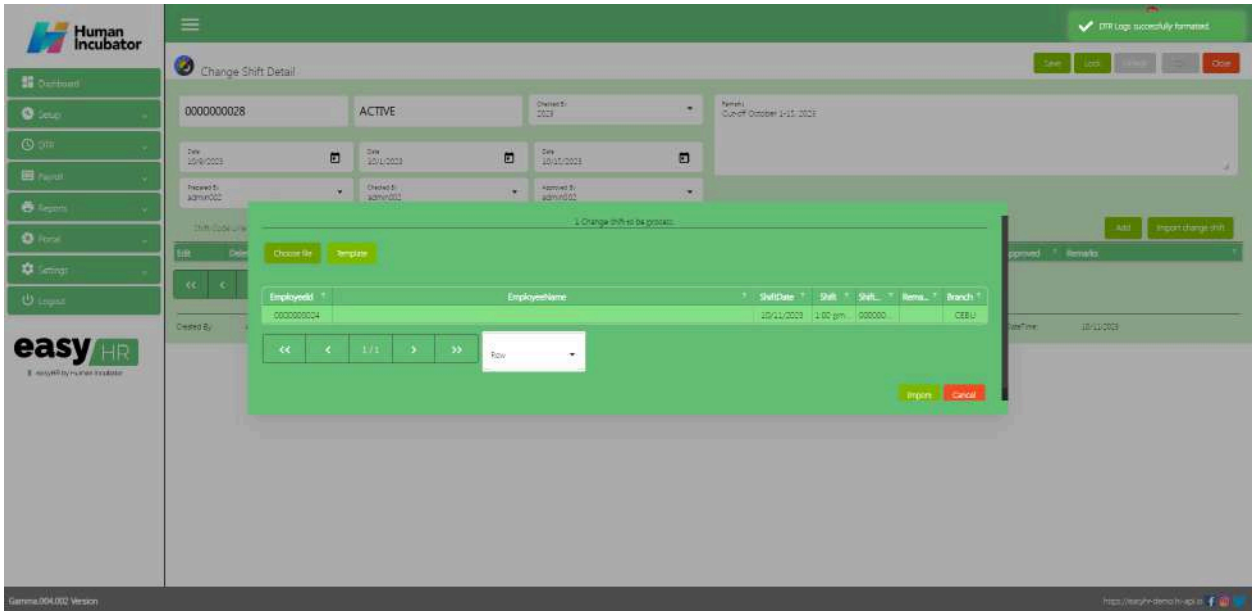


Import Change Shift

- Click **Import Change Shift** to import the master file
    - Choose file
    - Select file
    - Click Open

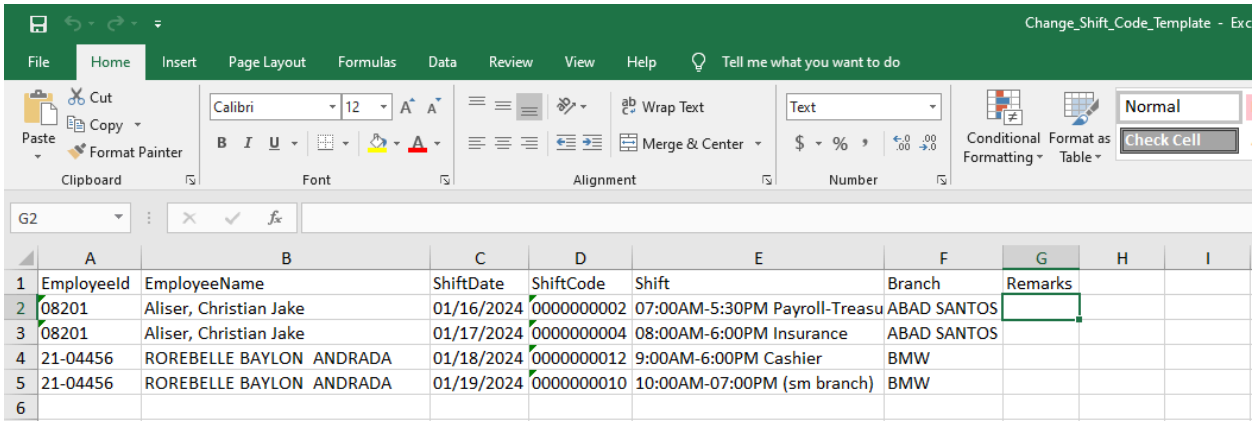


- Click **Import** button to add in the shift code line



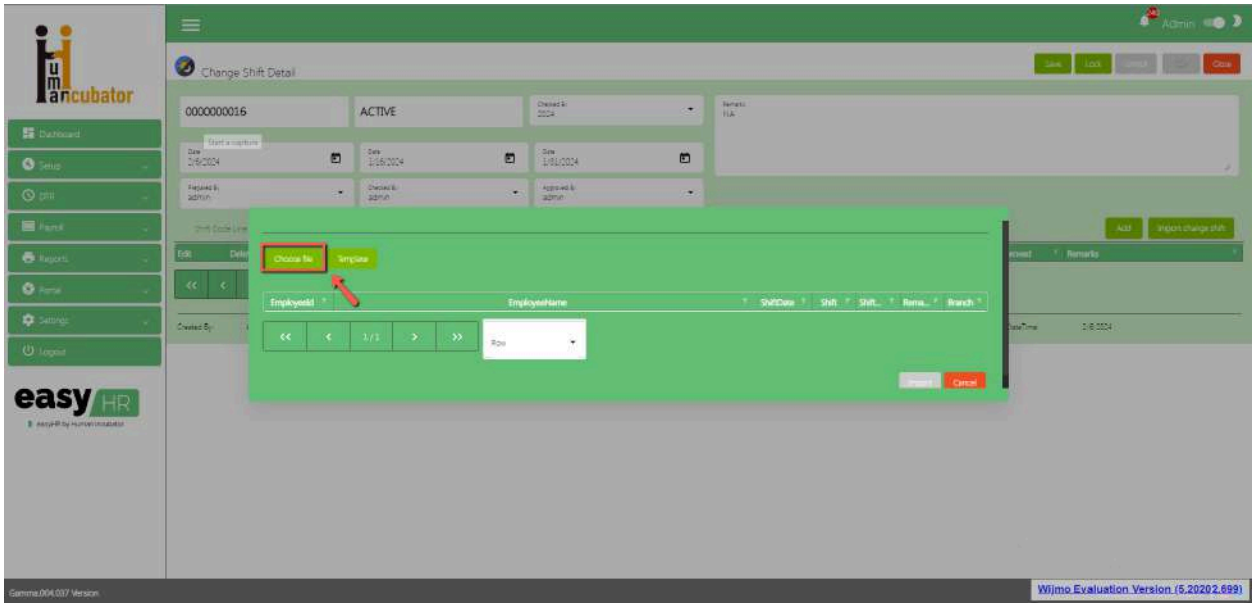
Change Shift Error Message

- If you import Change Shift with a wrong format an error message will pop-up (Example: Empty field in the Remarks) (Note: do not leave the field emptym, should put atleast NA in the field)

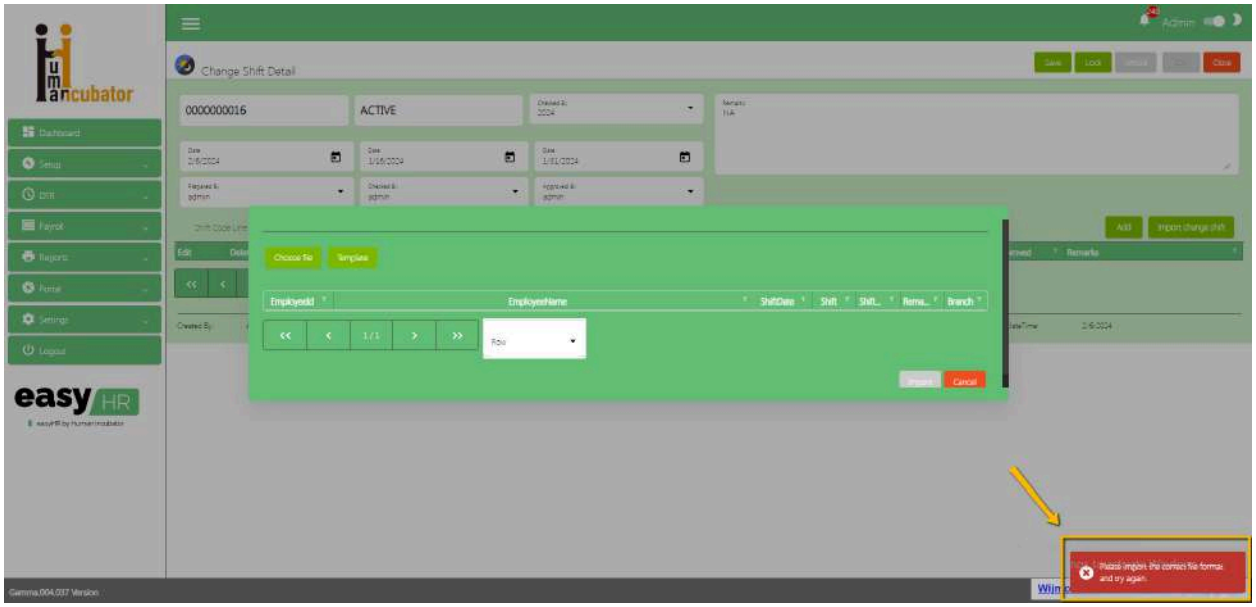


	A	B	C	D	E	F	G	H	I
1	EmployeeId	EmployeeName	ShiftDate	ShiftCode	Shift	Branch	Remarks		
2	08201	Aliser, Christian Jake	01/16/2024	0000000002	07:00AM-5:30PM Payroll-Treasu	ABAD SANTOS			
3	08201	Aliser, Christian Jake	01/17/2024	0000000004	08:00AM-6:00PM Insurance	ABAD SANTOS			
4	21-04456	ROREBELLE BAYLON ANDRADA	01/18/2024	0000000012	9:00AM-6:00PM Cashier	BMW			
5	21-04456	ROREBELLE BAYLON ANDRADA	01/19/2024	0000000010	10:00AM-07:00PM (sm branch)	BMW			
6									

- Select File to Import

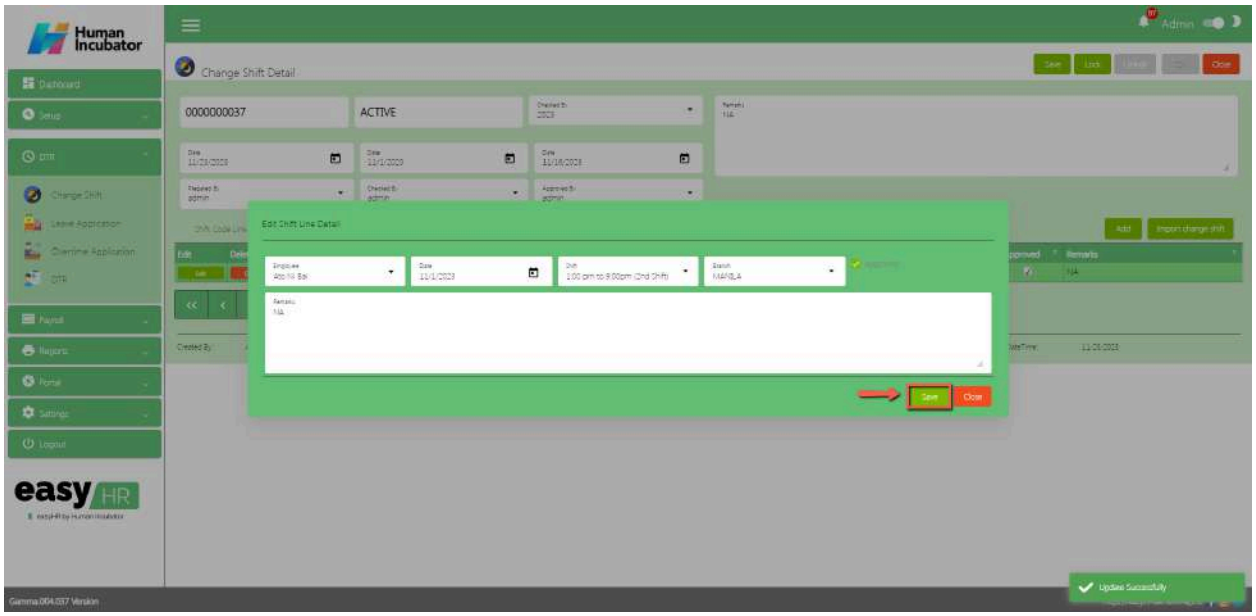


- Error Message will appear



Approved Change Shift

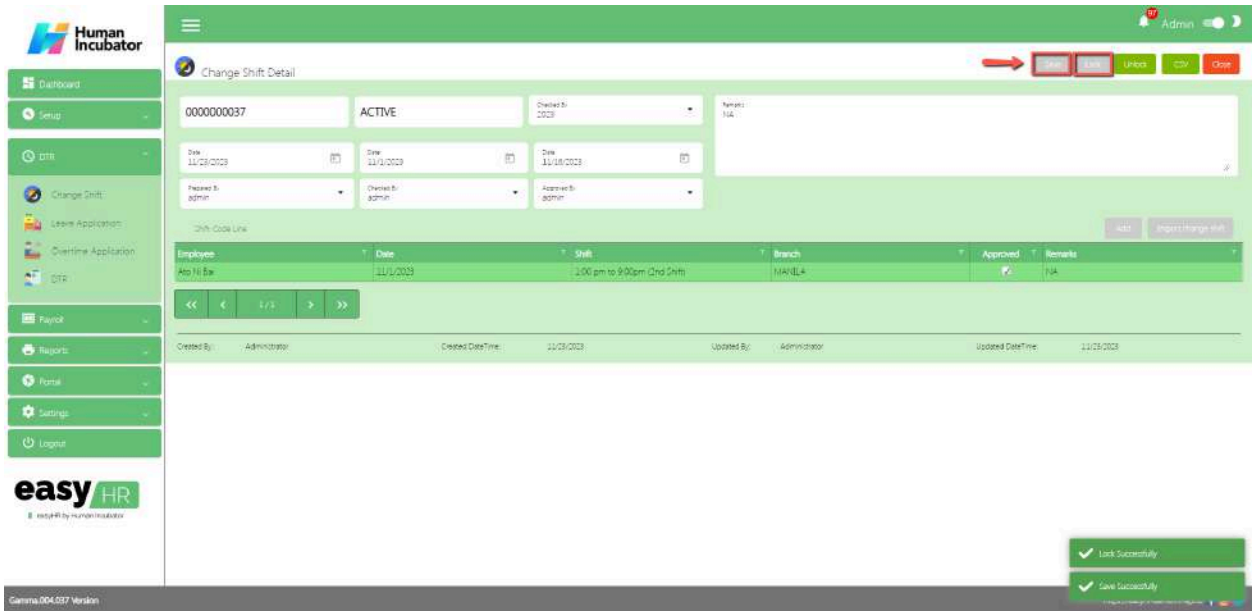
- Click **Edit** button to approve the change shift file in Employee portal
    - Check the Approved
    - Click **Save** button
    - Click **Close** button



Save/Lock

- Make sure to save/lock so the this record read and compute in system

  Note: Do not Save and Lock unless this cut-off will not yet finish and make sure all file change shifts are approved.



Column Table

- Employee: Name of the Employee
- Date: Date of the applied change shift
- Shift: Name of the shift schedule
- Branch: Employees Branch
- Approved: Check if it is already approved
- Remarks: You can input any remarks

Leave Application

Overview

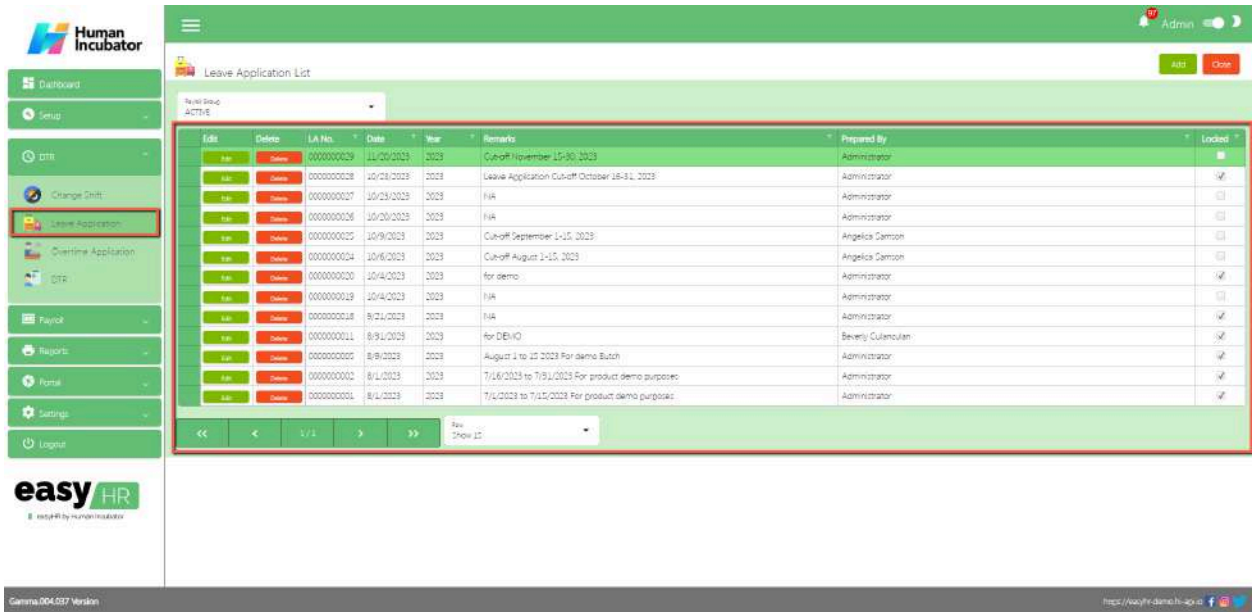
- Leave Application is used for setup a start date and end date per cut-off and also the user can approve if the employee filed a Leave Application
- The user file Leave in employee portal it is automatically seen by approver or admin

Leave Application List

- Shows all list of Leave Application setup per cut off
- Select Payroll Group

Column Table:

- Edit: This has a function to edit the Leave Application
- Delete: This has a function to Delete the Leave Application (Note: You will not be able to delete the Leave Application if it has still a Leave Application lines or the DTR connected is already locked)
- LA No. This is for the Leave Application number (Note: It will automatically generate according to the sequence of the added Leave Application)
- Date: Date of the Leave Application created
- Year: Year date of the Leave Application
- Remarks: You can input any remarks
- Prepared By: Fullname of the user who created the change shift
- Locked: If the Leave Application is locked you can select it for the DTR

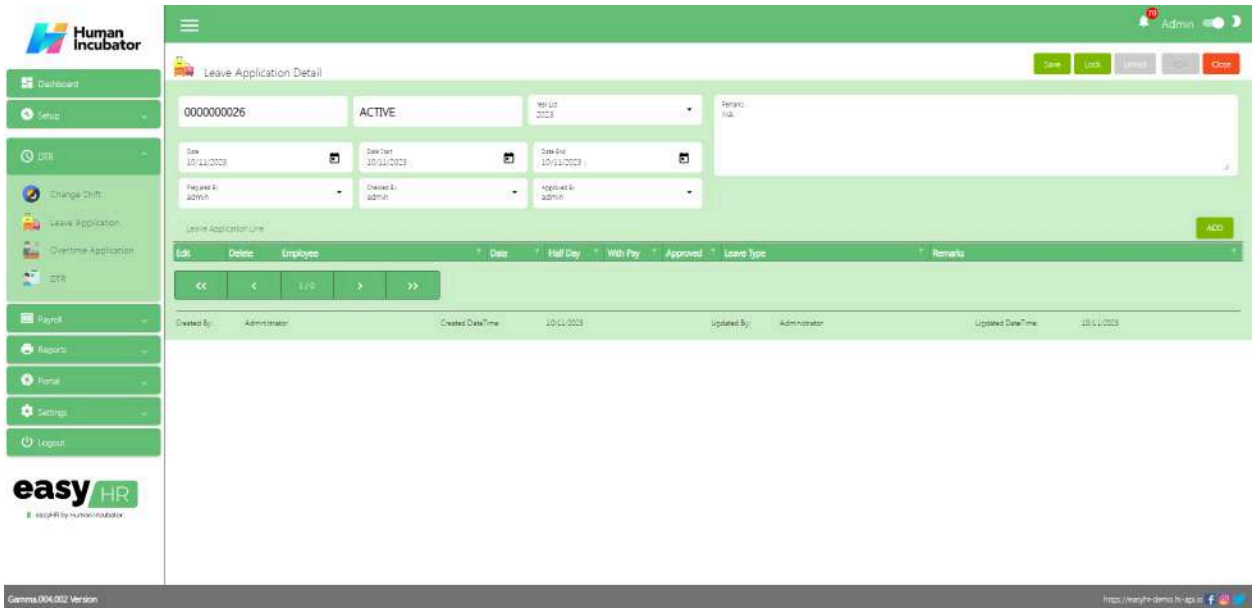


Leave Application Detail

- To **Add** a new Leave Application detail, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Leave Application detail like:
    - Select Date Start
    - Select Date End

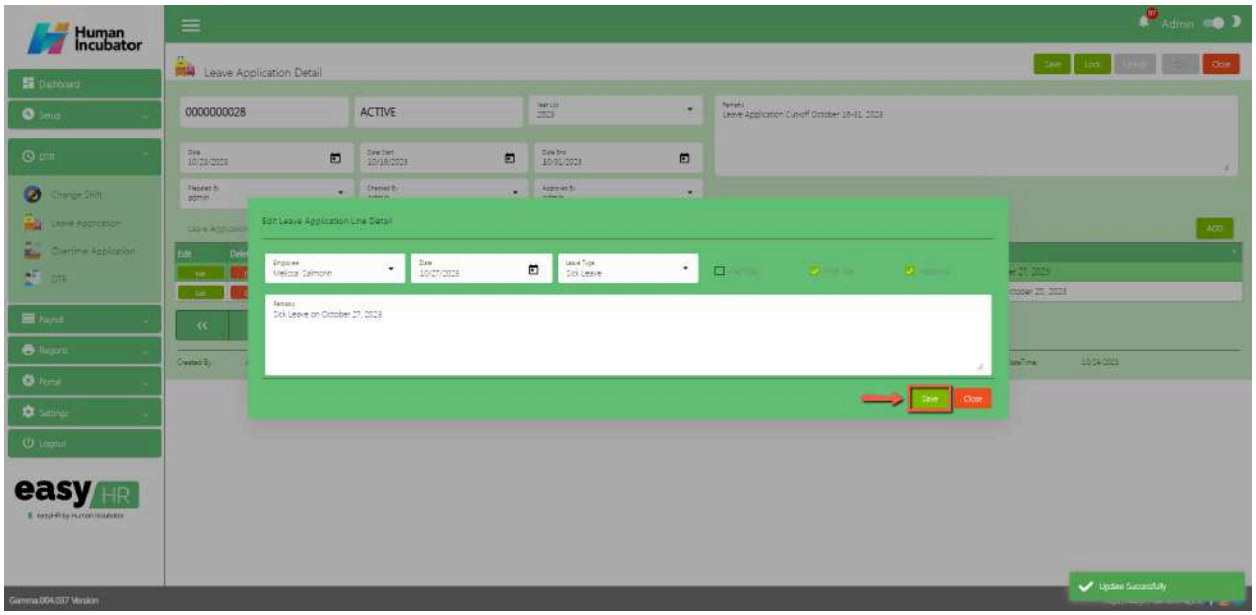
- Input Remarks
- Select Prepared By
- Select Check By
- Select Approved By

Note: Do not Save and Lock so that this shift code seen in employee portal



Add Leave Application Manually

- Click **Add** button to add manually leave application of employee
- Fill all the important fields Shift line like:
  - Select Employee
  - Select Date
  - Select Leave Type
  - Check the **Checkbox** if Half Day/ With Pay
  - Check Approved
  - Input Remarks
  - Click **Save** button
  - Click **Close** button to add in table



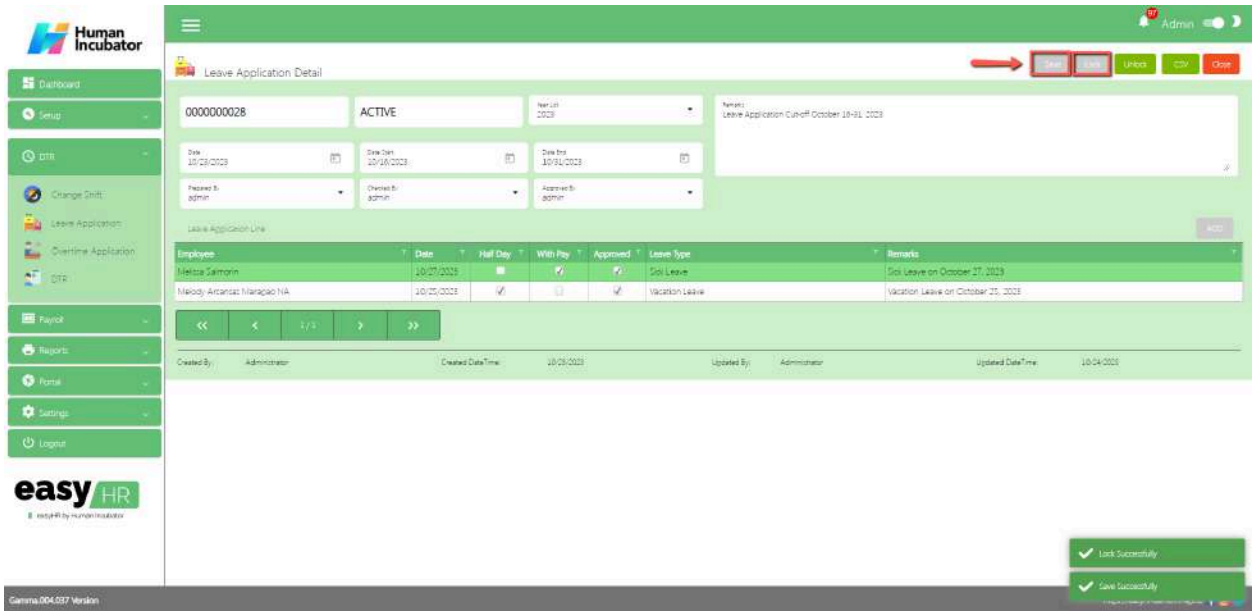
Approved Leave Application

- Click **Edit** button to approve the leave application file in Employee portal
    - Check the Approved
    - Click **Save** button
    - Click **Close** button

Save/Lock

- Make sure to save/lock so the this record read and compute in system

  Note: Do not Save and Lock unless this cut-off will not yet finish and make sure all file leaves are approved.



Column Table

- Employee: Name of the Employee
- Date: Date of the applied Leave
- Halfday: Check if it is halfday
- With Pay: Check if it is with pay
- Approved: Check if it is already approved
- Leave Type: Type of leave, Vacation leave or Sick leave
- Remarks: You can input any remarks

Overtime Application

Overview

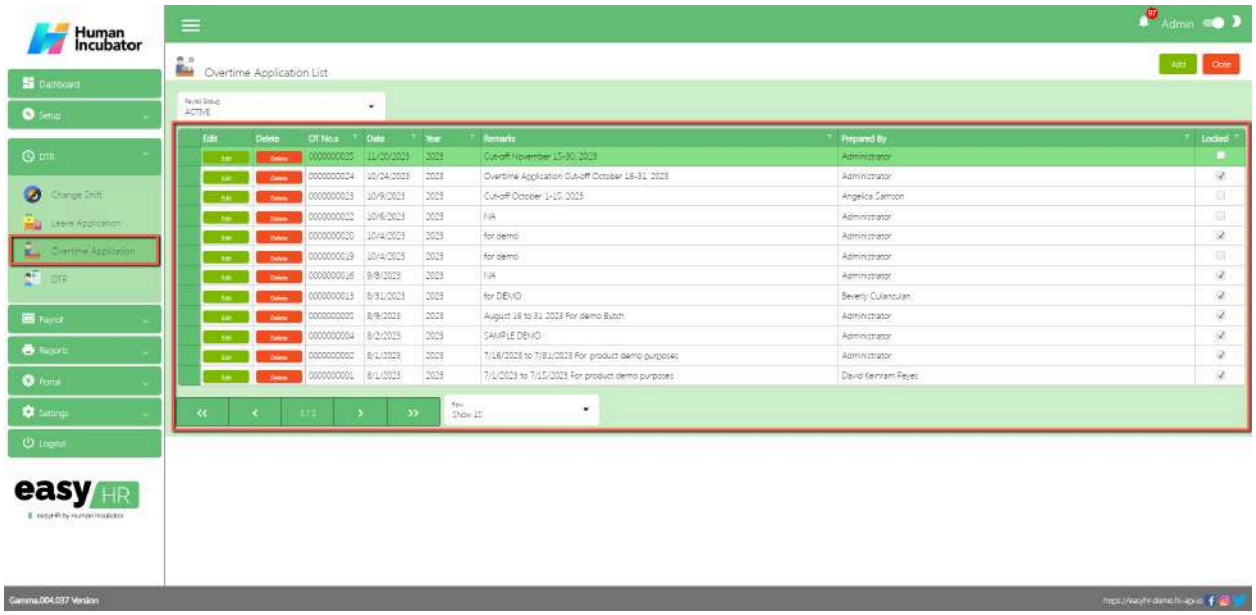
- Overtime Application is used for setup a start date and end date per cut-off and also the user can approve if the employee filed a Overtime Application
- The user file Overtime in employee portal it is automatically seen by approver or admin

Overtime Application List

- Shows all list of Overtime Application Setup per cut off
- Select Payroll Group

Column Table

- Edit: This has a function to edit the Overtime Application
- Delete: This has a function to delete the Overtime Application (Note: You will not be able to delete the Overtime Application if it has still a Overtime Application lines or the DTR connected is already locked)
- OT No.: This is for Overtime Application number (Note: It will automatically generate according to the sequence of the added Overtime Application)
- Date: Date of the Ovetime Application added
- Year: Year Date of the Overtime Application
- Remarks: You can input any remarks
- Prepared By: Fullname of the user who created the Overtime Application
- Locked: If the Overtime Application is locked you can select it for the DTR

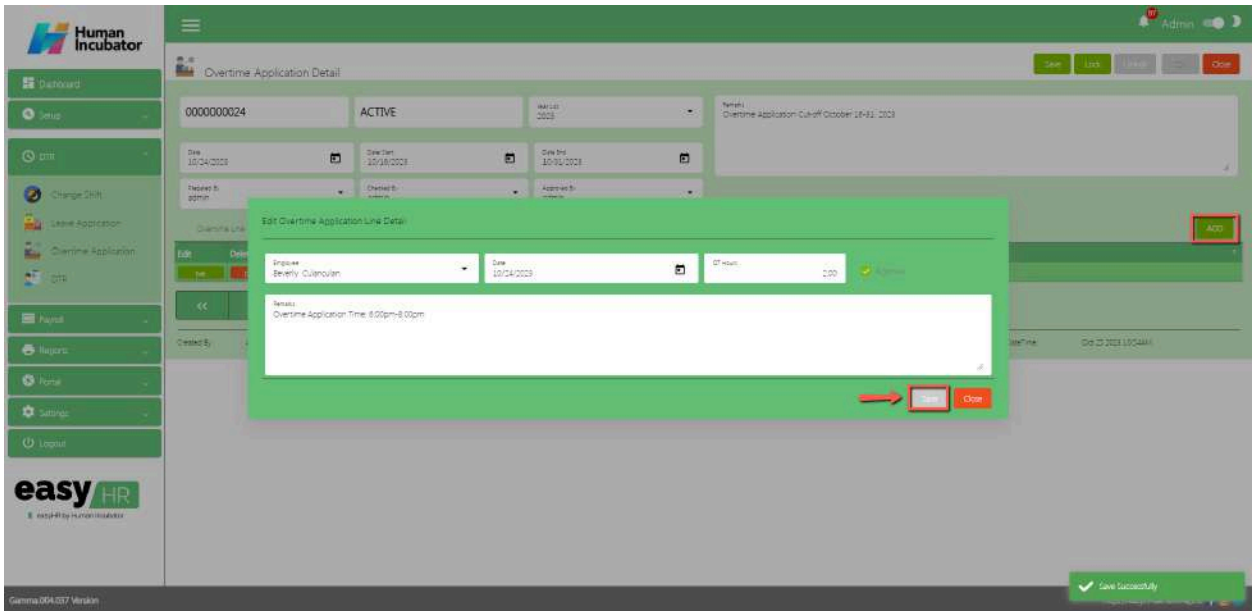


Overtime Application Detail

- To **Add** a new Overtime Application detail, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Overtime Application detail like:
    - Select Date Start
    - Select Date End
    - Input Remarks
    - Select Prepared By
    - Select Check By
    - Select Approved By

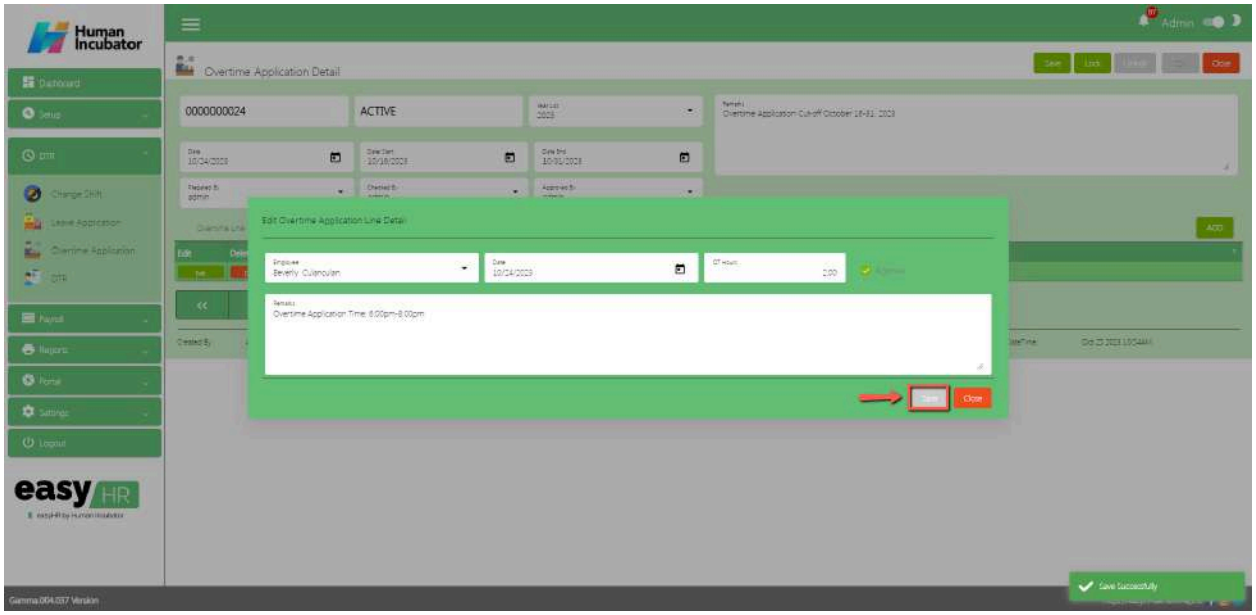
Add Overtime Application Manually

- Click **Add** button to add manually Overtime application of employee
- Fill all the important fields Shift line like:
    - Select Employee
    - Select Date
    - Input OT hours
    - Check Approved
    - Input Remarks
    - Click **Save** button
    - Click **Close** button to add in table



Approved Overtime Application

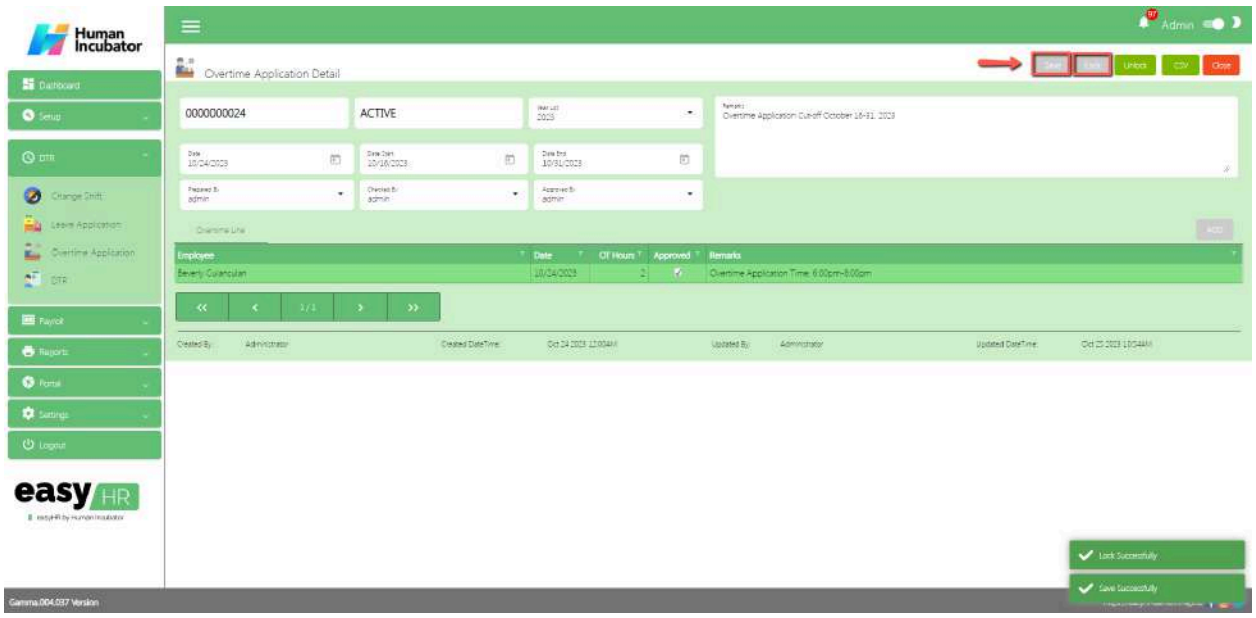
- Click **Edit** button to approve the overtime application file in Employee portal
    - Check the Approved
    - Click **Save** button
    - Click **Close** button



Save/Lock

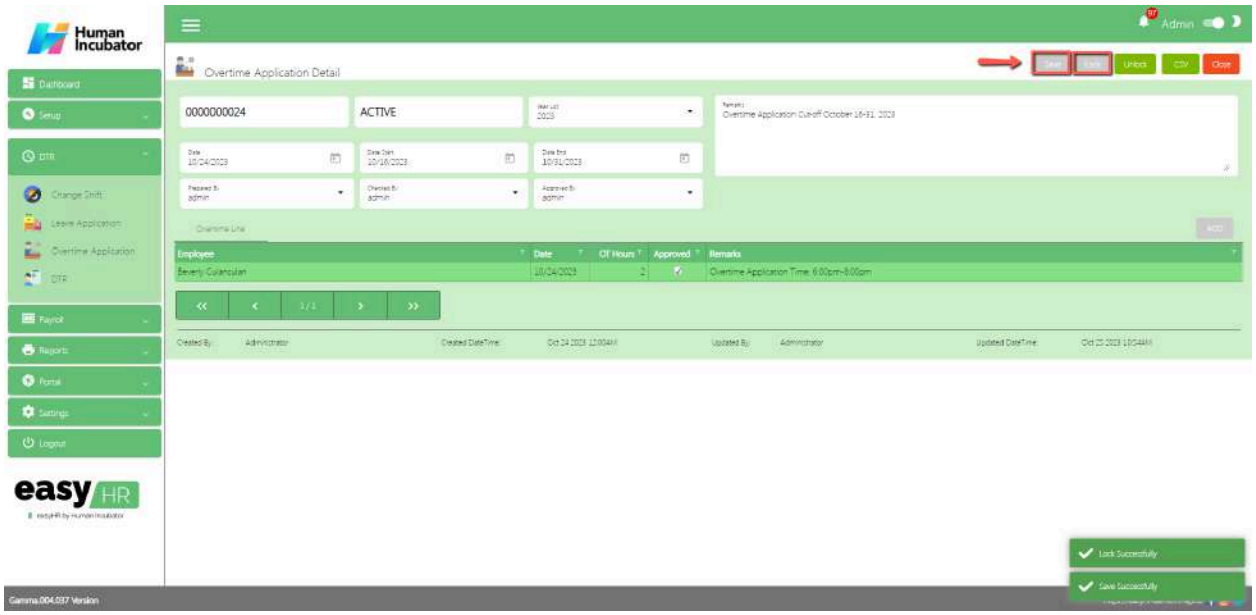
- Make sure to save/lock so the this record read and compute in system

  Note: Do not Save and Lock unless this cut-off will not yet finish and make sure all file overtime are approved.



Column Table

- Employee: Name of the Employee
- Date: Date of the applied Overtime
- OT Hours: Applied Overtime Hours
- Approved: Check if it approved
- Remarks: You can input any remarks



DTR

Overview

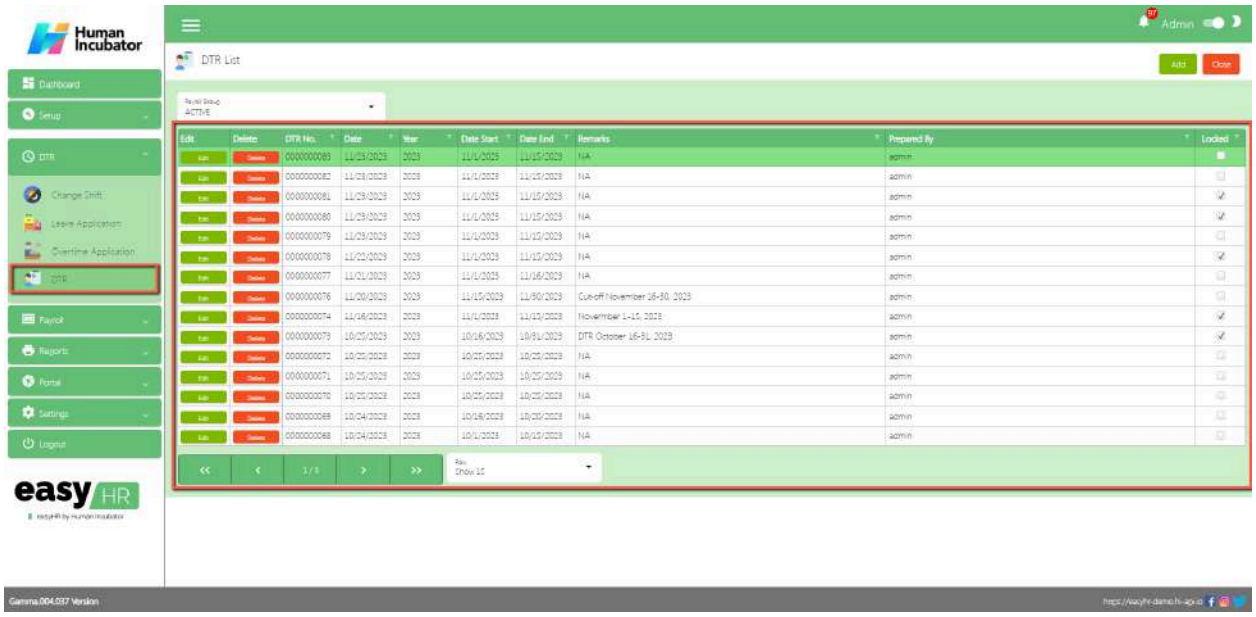
- DTR is used for adding a DTR logs, Import DTR logs for employee and also compute the total net pay, Overtime and Additional Allowance

DTR List

- Shows all list of DTR per cut off
- Select Payroll Group

Table Column

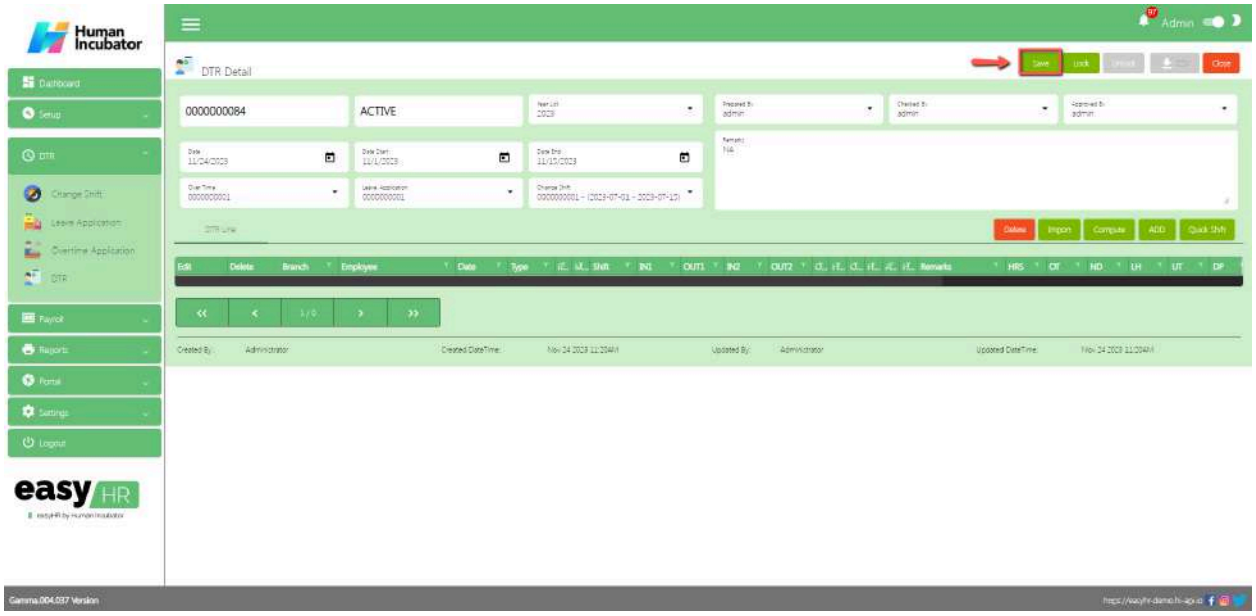
- Edit: This has a function to edit the DTR
- Delete: This has a function to Delete the DTR (Note: You will not be able to delete the DTR if it has still a DTR lines or the Payroll connected is already locked)
- DTR No.: This is for the DTR number (Note: It will automatically generate according to the sequence of the added DTR)
- Date: Date of the added DTR
- Year: Year Date of the added DTR
- Date Start: Cut-off date start
- Date End: Cut-off date end
- Remarks: You can add any remarks
- Prepared By: Full Name of the login user who created the DTR
- Locked: If the DTR is locked you can now select it for payroll



DTR Detail

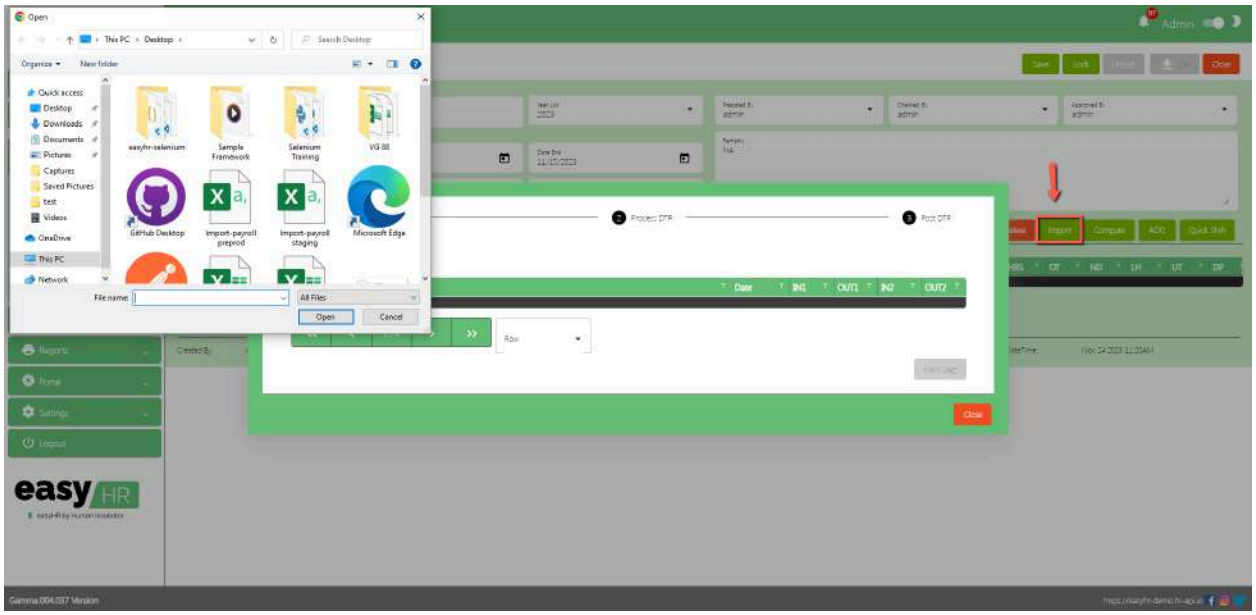
- To **Add** a new DTR detail, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in DTR detail like:
    - Select Date Start cut-off
    - Select Date End cut-off

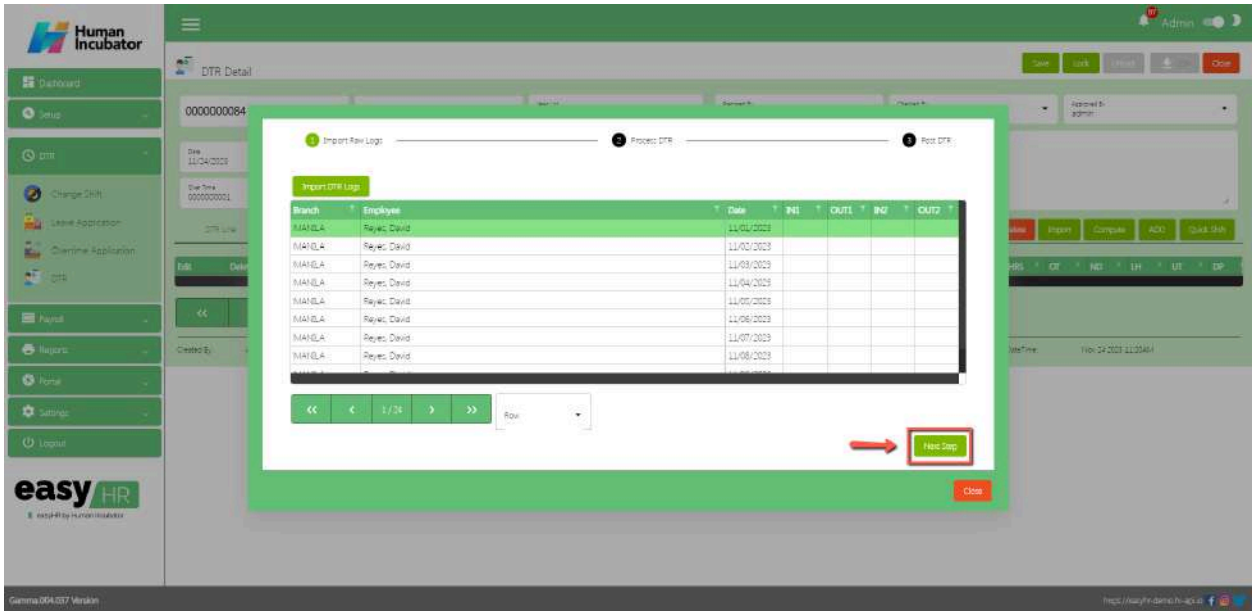
- Select Overtime Code
- Select Leave Application Code
- Select Change Shift Code
- Select Prepared By
- Select Checked By
- Select Approved By
- Input Remarks
- Click **Save** button to save all selected fields

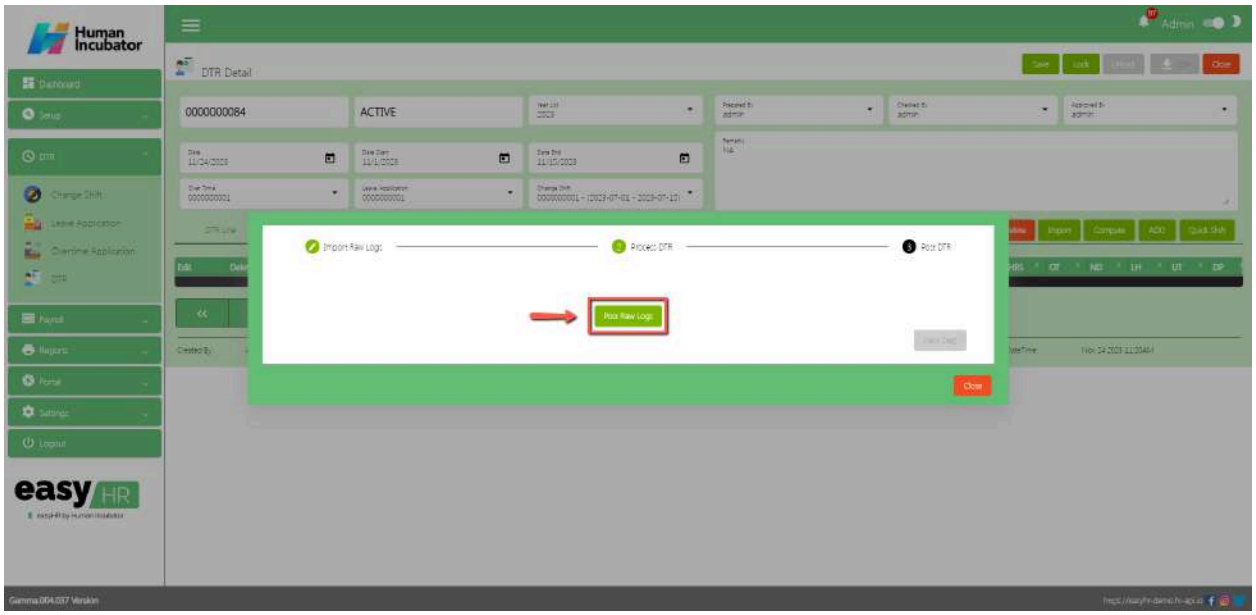


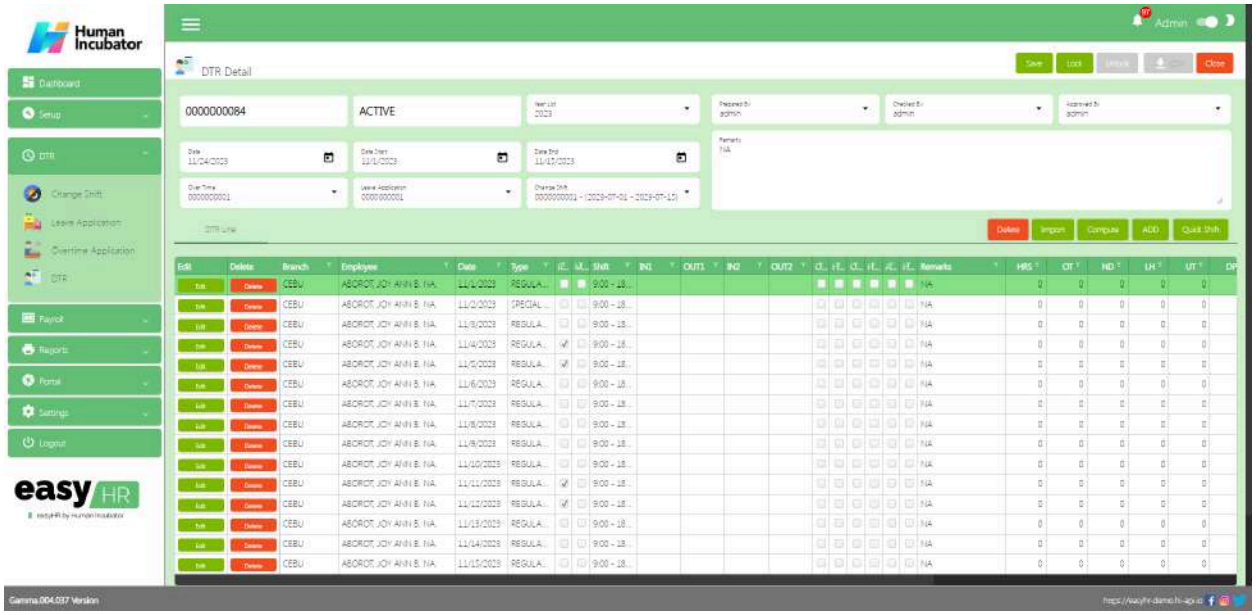
Import DTR

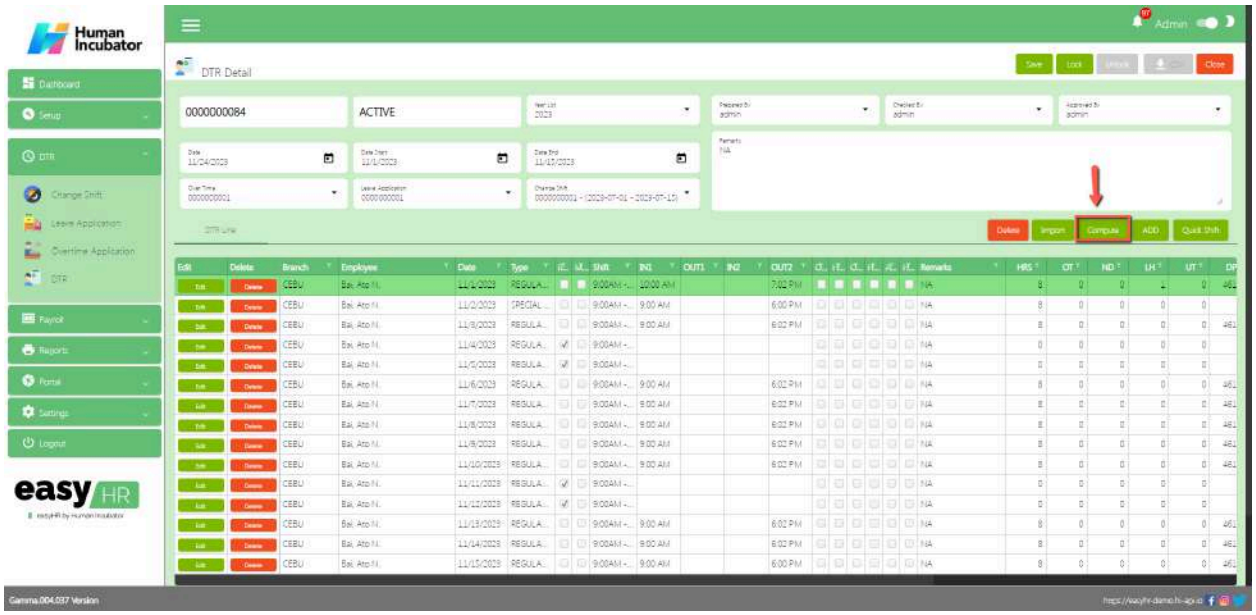
- Click **Import** button to import DTR logs for employee
  - Click **Import DTR Logs** button
  - Select master file
  - Click **Open** to import DTR logs
  - Click **Next Step** button
  - Click **Post Raw Logs** button
  - Click **Post DRT** button (DTR Lines Successfully posted)
  - Click **Close** button
  - Click **Compute** button to compute the total net pay






Human Incubator
DTR Detail
0000000084
ACTIVE
Import Raw Logs
Process DTR
Post DTR
Post Raw Logs
Close
easy HR


Human Incubator
DTR Detail
0000000084
ACTIVE
easy HR

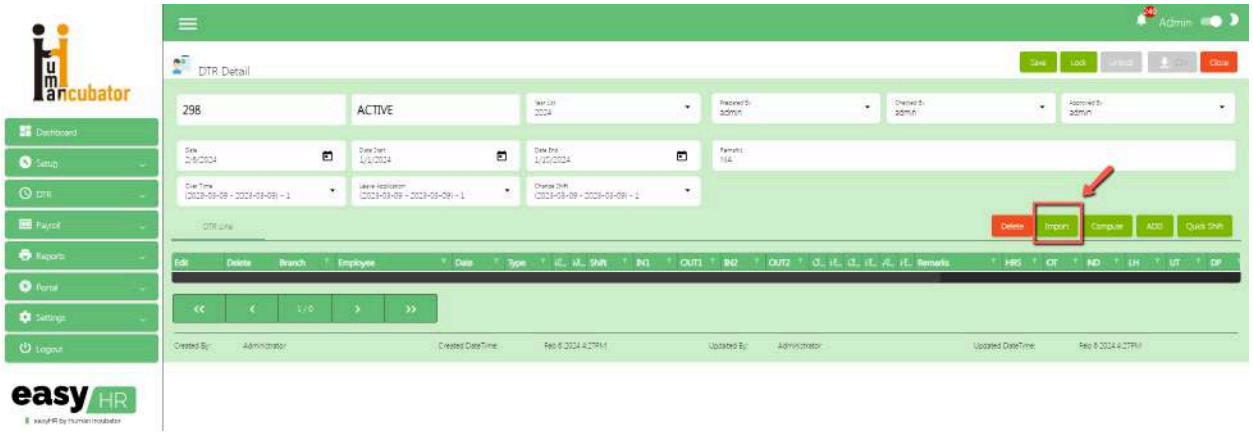


Import DTR Incorrect Format Error Message

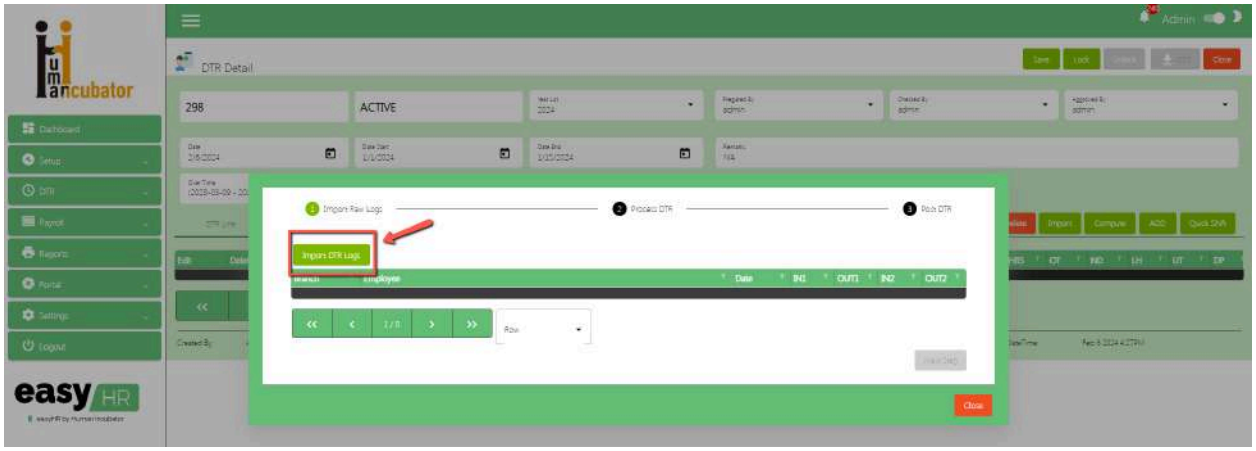
- In the Excel file Delete column ID and EmployeeName
- Import Excel File

			Department	Att_Time	Att_ID	Dev_ID	Photo_ID
2	08201	08201		01/02/24 08:37:53			
3	08201	08201		01/02/24 18:42:42			
4	08201	08201		01/03/24 08:41:54			
5	08201	08201		01/03/24 18:36:41			
6	08201	08201		01/04/24 08:29:57			
7	08201	08201		01/04/24 18:30:18			
8	08201	08201		01/05/24 08:41:25			
9	08201	08201		01/05/24 18:01:57			
10	08201	08201		01/08/24 08:50:59			
11	08201	08201		01/08/24 18:31:25			
12	08201	08201		01/09/24 08:45:15			
13	08201	08201		01/09/24 18:26:22			
14	08201	08201		01/10/24 08:29:18			
15	08201	08201		01/10/24 18:16:02			
16	08201	08201		01/11/24 08:51:17			
17	08201	08201		01/11/24 18:02:31			
18	08201	08201		01/12/24 08:41:56			
19	08201	08201		01/12/24 18:10:16			
20	08201	08201		01/15/24 08:41:27			
21	08201	08201		01/15/24 18:28:01			

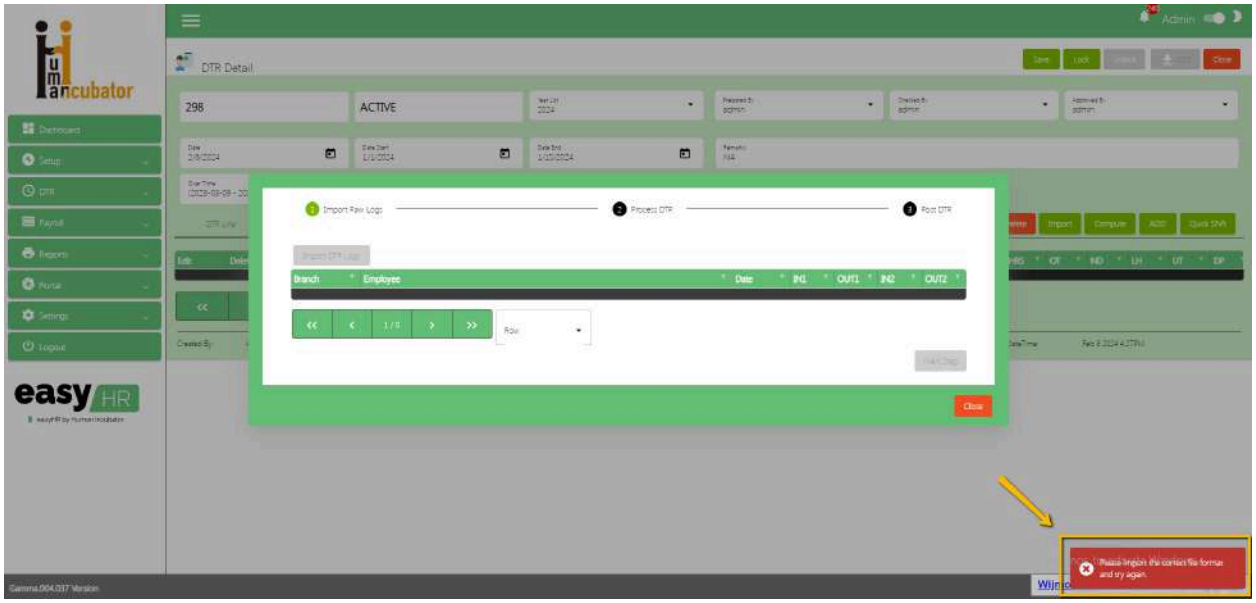
- Click Import



- Click Import DTR Logs

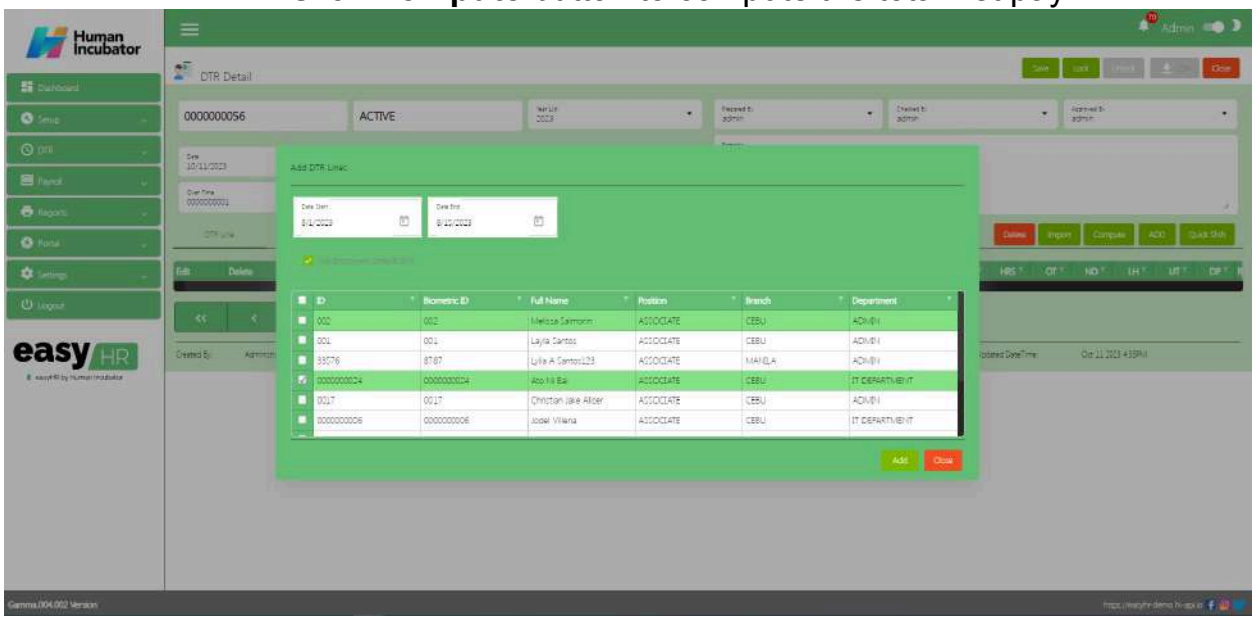


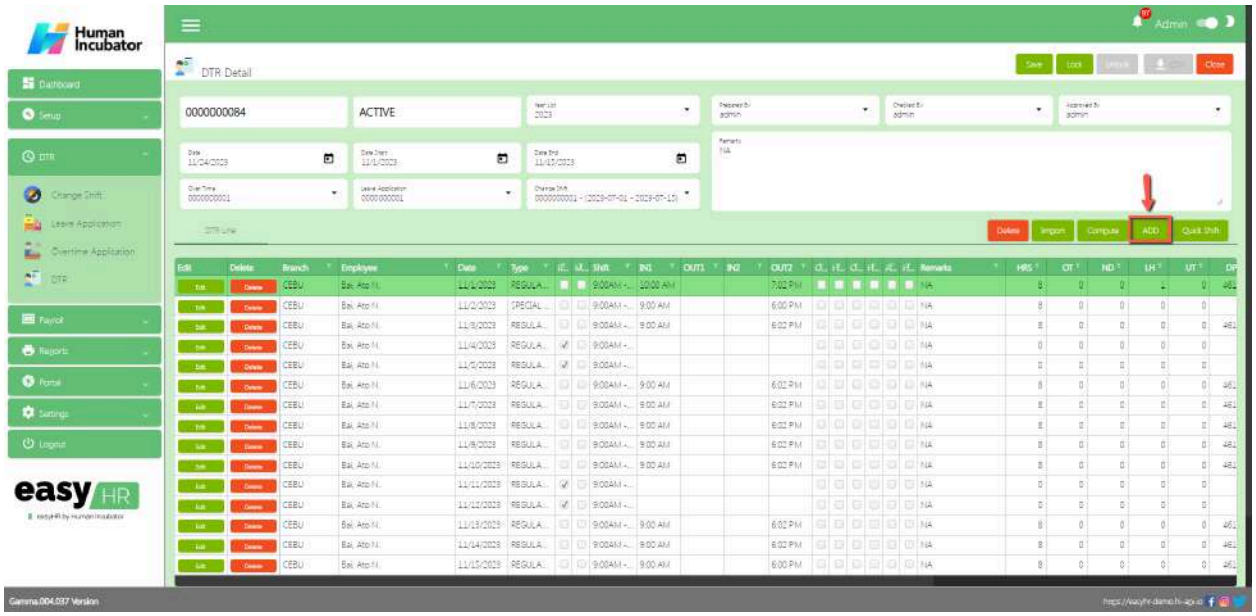
- Error Message will appear if wrong format

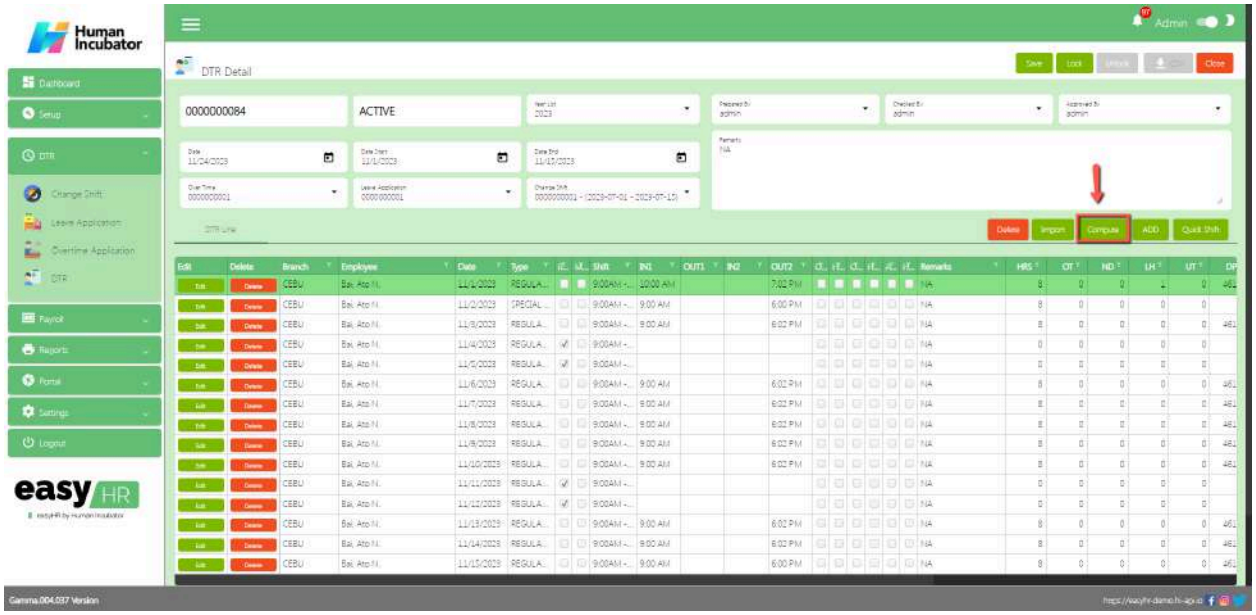


Add DRT logs

- Click **Add** button to add manually DTR logs for employee
    - Check the **Use Employee's Default Shift**
    - Pick the employee
    - Click **Add** button to add in DTR line
    - Click **Compute** button to compute the total net pay







Save/Lock

- Make sure to save/lock so that this record is read and computed in the system and also the DTR code will be viewed in the Payroll module.

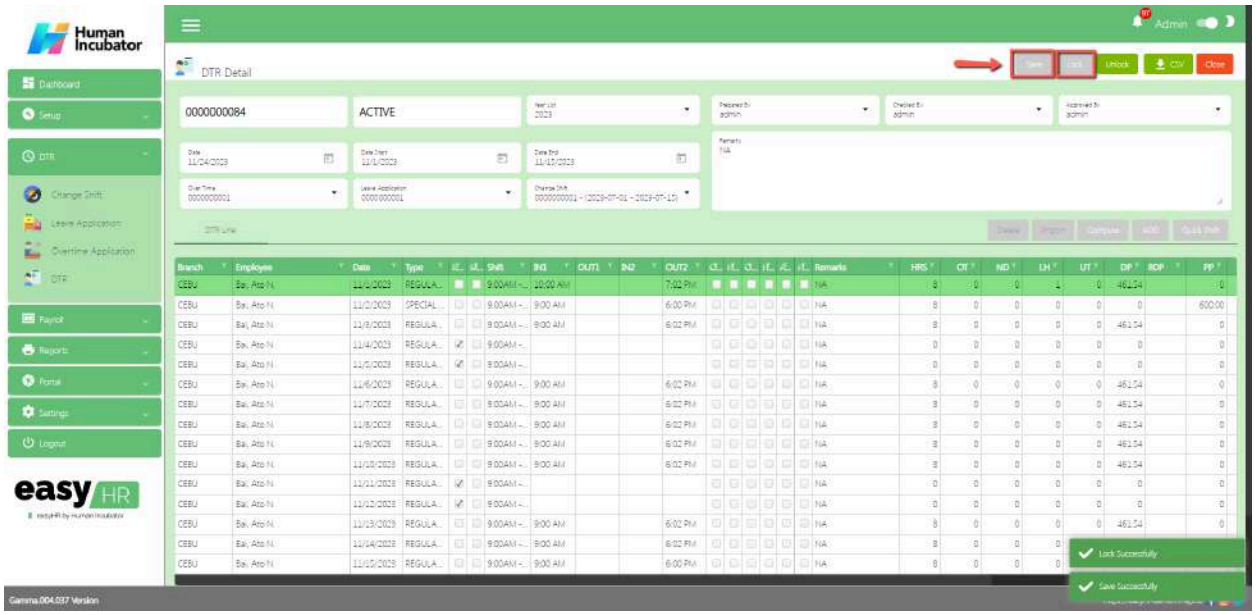
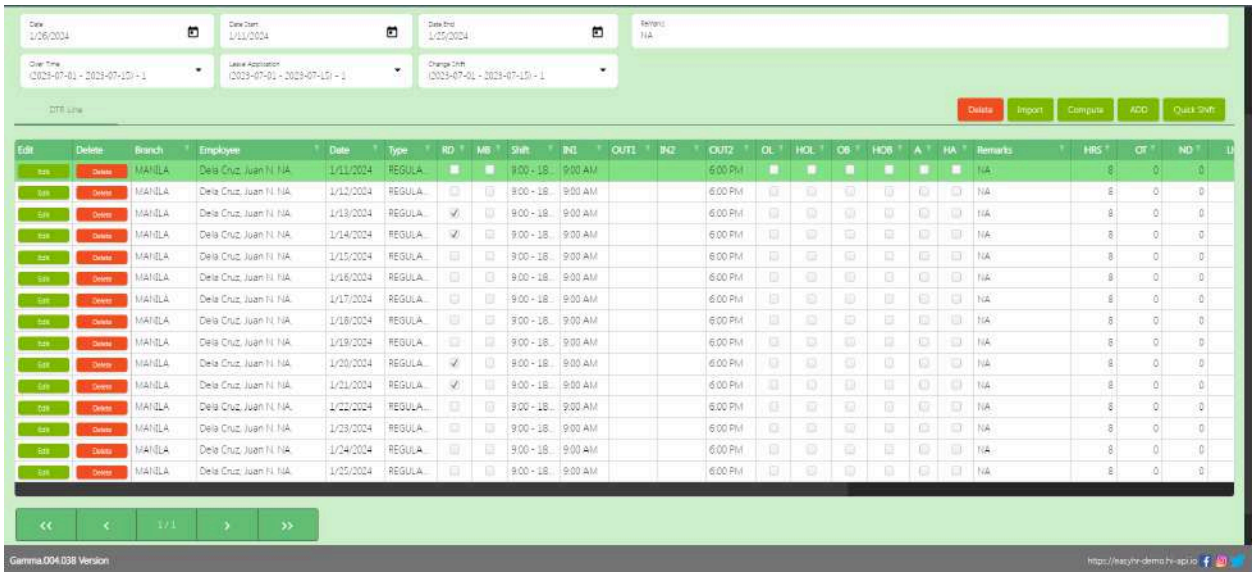
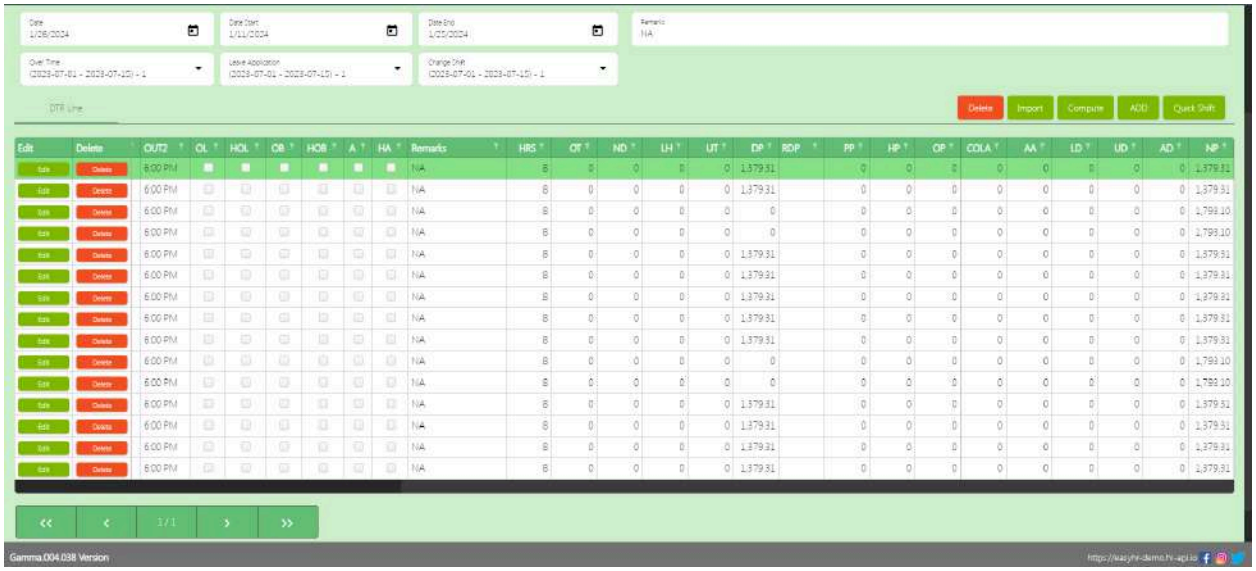


Table Column

- Edit: This has a function to edit the DTR per line
- Delete: This has a function to Delete the per line
- Branch: Branch of the Employee
- Employee: Name of the Employee
- Date: Date of the logs
- Type: Type if its Regular Working Day, Regular Holiday or Special Holiday
- RD: If it is check it means its the employees restday
- MB: If it is check it means Shift has Multiple Breaks
- Shift: Name of the Shift
- IN1: 1st in
- OUT1: 1st out
- IN2: 2nd in
- OUT2: 2nd out
- OL: If it is check it means On Leave
- HOL: If it is check it means Halfday On Leave
- OB: If it is check it means Official Business
- HOB: If it is check it means Halfday Official Business
- A: If it is check it it means Absent
- HA: If it is check it means Halfday Absent
- Remarks: You can input any remarks
- HRS: Total number of shift's hours
- OT: Total number of Overtime Hours
- ND: Total number of Night Differential Hours
- LH: Total number of Late Hours
- DP: Employees Daily Pay of that day
- RDP: Employees Restday Pay for that day
- PP: Employees Premium Pay for that day (Note: Premium Pay means Special Holiday Pay)
- HP: Employees Holiday Pay for that day (Note: Holiday Pay means Regular Holiday Pay)
- OP: Employees Total Overtime Pay for that day
- COLA: Employees Cost of Leaving Allowance for that day
- AA: Employees Additional Allowance for that day
- LD: Employees Late Deduction for that day
- UD: Employees Undertime Deduction for that day

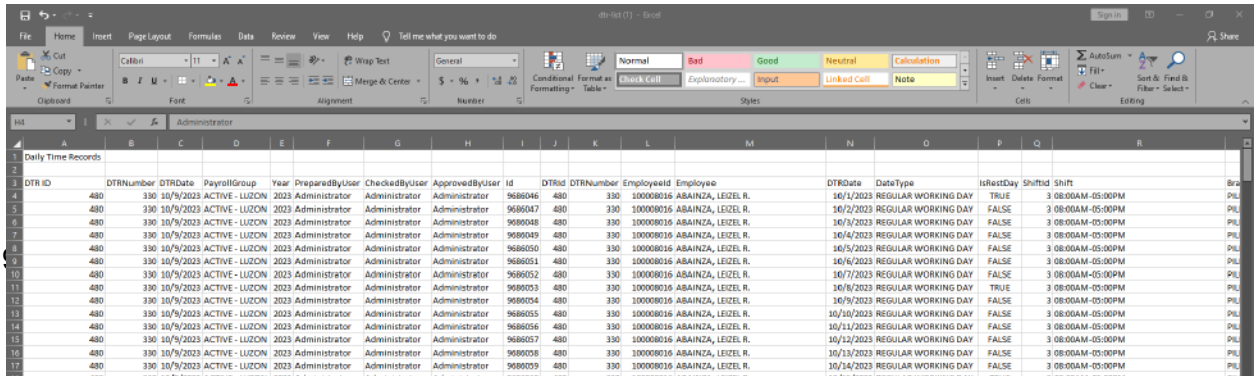
- AD: Employees Absent Deduction for that day
- NP: Employees Net Pay for that day





Download CSV

- Click the **CSV** button to download the CSV file



Section VI: Payroll

Loan

Overview

- Loans are used to view the list of loan balances for employees and also the user can add loans

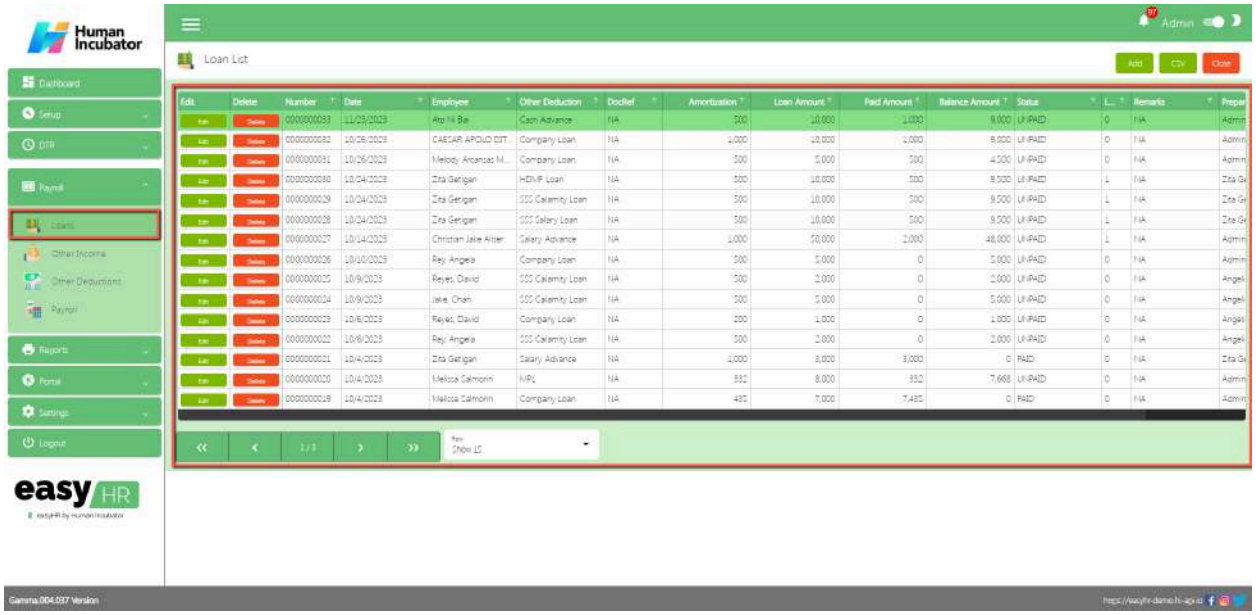
Loan List

- Shows all the list of loans for employee

Column Table

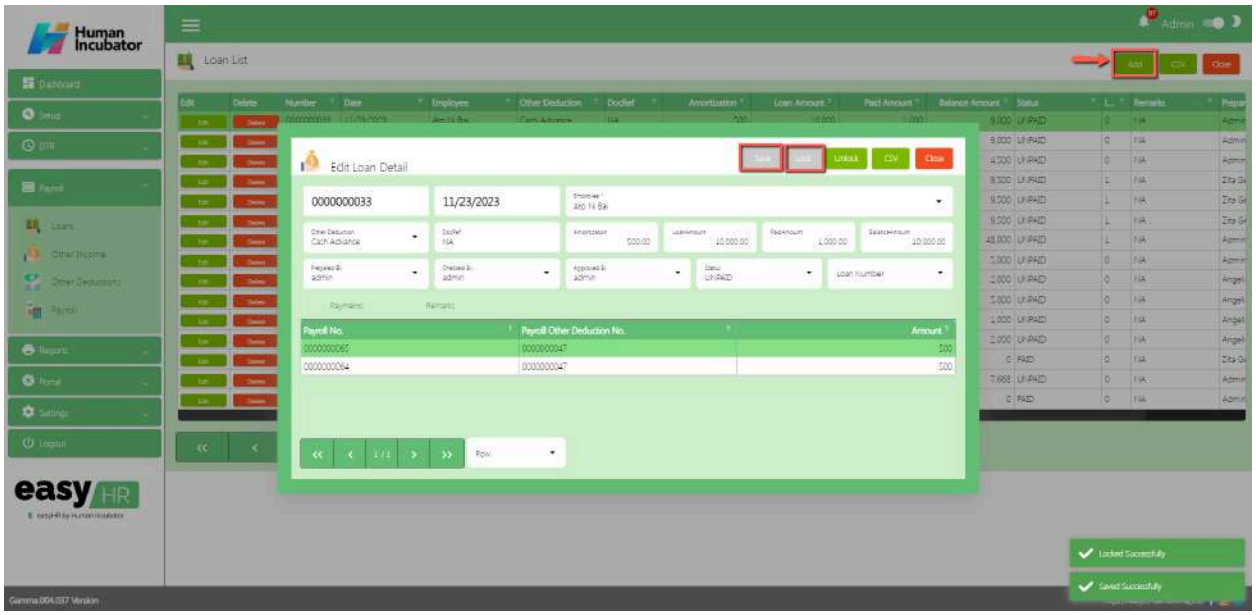
- Edit: This has a function to edit the loan
- Delete: This has a function to delete the loan (Note: You will not be able to delete the loan if it has already a transaction data)
- Number: This is for the loan number (Note: It will automatically generate according to the sequence of the added Loan)
- Date: Date of the loan added
- Employee: Name of the Employee
- Other Deduction: Name of the Other Deduction
- DocRef: You can input any doc ref
- Amortization: Payment amortization of the loan
- Loan Amount: Amount of the loan
- Paid Amount: Paid amount of the loan

- Balance Amount: Balance amount of the loan
- Status: Status of the loan if it is paid or unpaid
- Loan Number: This loan number is used to separate the loans for the Get loan feature in the Other Deduction module
- Remarks: You can input any remarks
- Prepared By: Fullname of the user who added the loan
- Locked: Check if is already locked



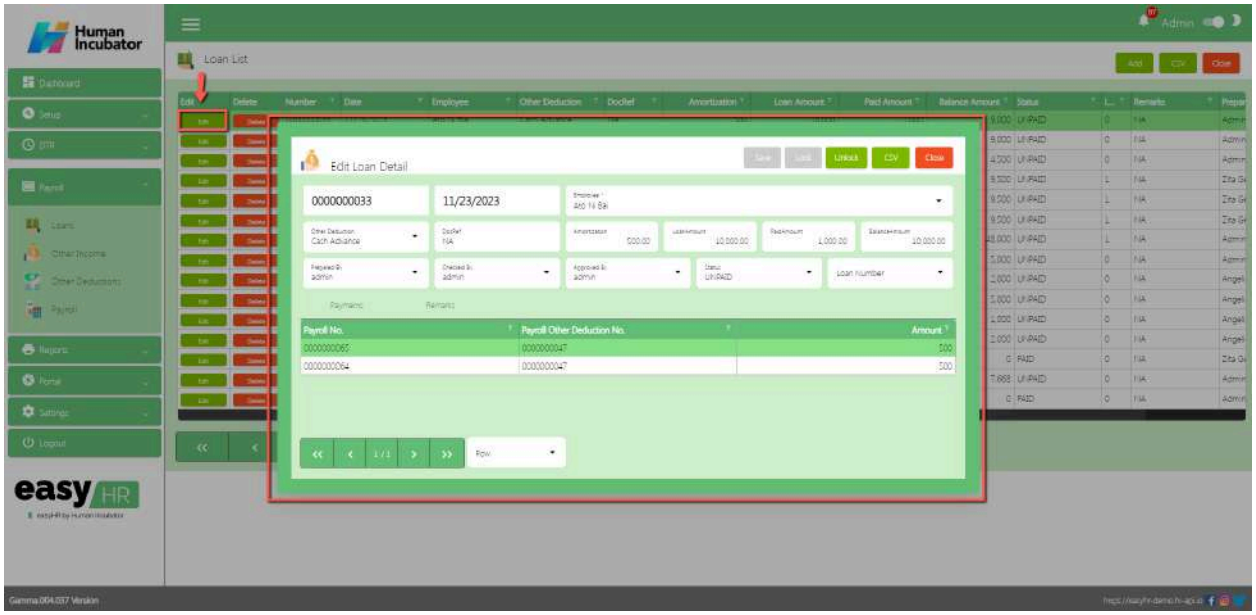
Loan Detail

- To **Add** a new Loan, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Loan detail like:
    - Select Employee
    - Select Other Deduction (Loan Name)
    - Input monthly Amortization and Loan Amount
    - Select Checked By and Approved By
    - Select Status (Unpaid)
    - Select Loan number
    - Click **ADD** button to add the loan
    - Click **Edit** button and **Save/Lock** so that the loan will be posted



Show Loan Detail

- Click **Edit** button to show the loan details of employee

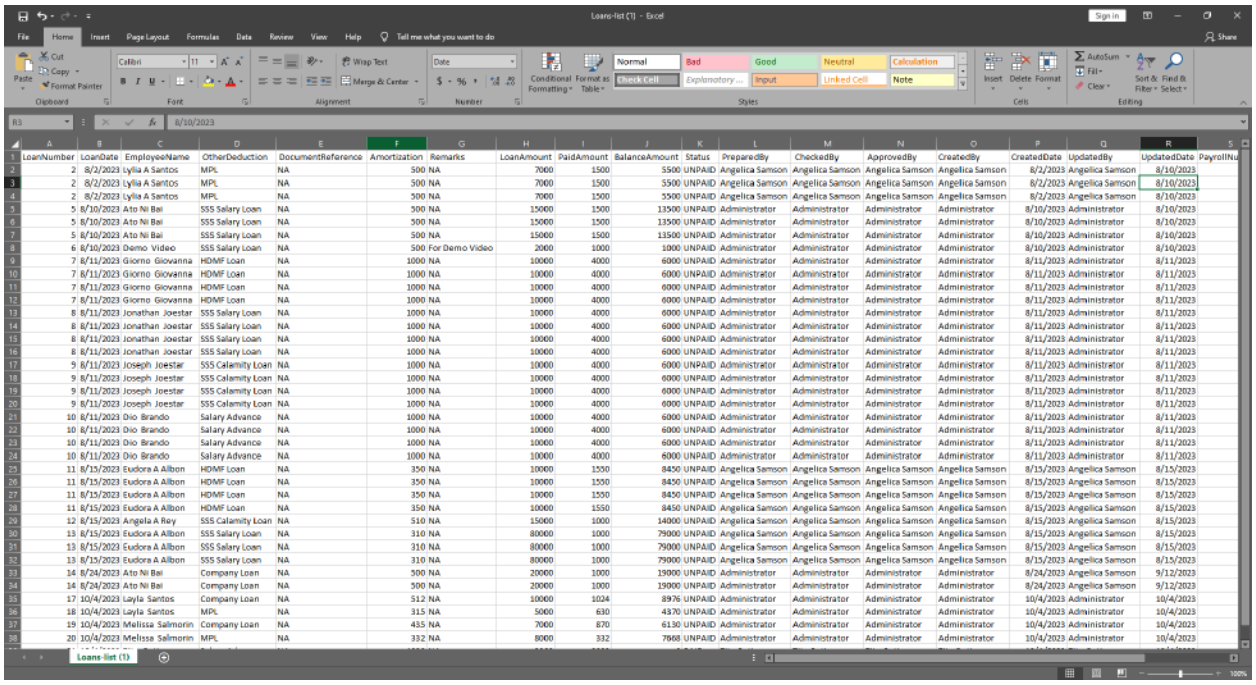


Column Table

- Payroll No.: Payroll number history of the loan
- Payroll Other Deduction No.: Payroll Other Deduction number history of the loan
- Amount: Payment Amount history of the loan

Download CSV In Loan List

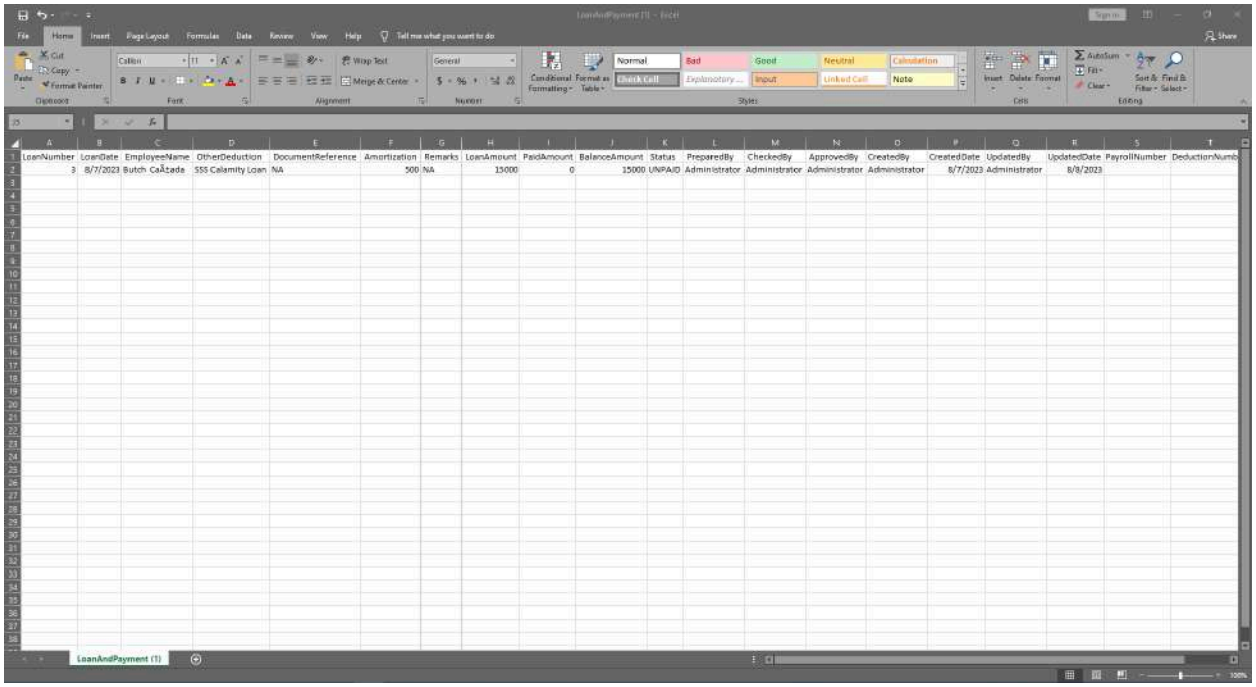
- Click the CSV button to download the CSV file



LoanNumber	LoanDate	EmployeeName	OtherDeduction	DocumentReference	Amortization	Remarks	LoanAmount	PaidAmount	BalanceAmount	Status	PreparedBy	CheckedBy	ApprovedBy	CreatedBy	CreatedDate	UpdatedBy	UpdatedDate	PayrollNu
2	8/2/2023	Lylia A Santos	MPL	NA	500	NA	7000	1500	5500	UNPAID	Angelica Samson	Angelica Samson	Angelica Samson	Angelica Samson	8/2/2023	Angelica Samson	8/10/2023	
2	8/2/2023	Lylia A Santos	MPL	NA	500	NA	7000	1500	5500	UNPAID	Angelica Samson	Angelica Samson	Angelica Samson	Angelica Samson	8/2/2023	Angelica Samson	8/10/2023	
2	8/2/2023	Lylia A Santos	MPL	NA	500	NA	7000	1500	5500	UNPAID	Angelica Samson	Angelica Samson	Angelica Samson	Angelica Samson	8/2/2023	Angelica Samson	8/10/2023	
5	8/10/2023	Ato Ni Bai	SSS Salary Loan	NA	500	NA	15000	1500	13500	UNPAID	Administrator	Administrator	Administrator	Administrator	8/10/2023	Administrator	8/10/2023	
5	8/10/2023	Ato Ni Bai	SSS Salary Loan	NA	500	NA	15000	1500	13500	UNPAID	Administrator	Administrator	Administrator	Administrator	8/10/2023	Administrator	8/10/2023	
5	8/10/2023	Ato Ni Bai	SSS Salary Loan	NA	500	NA	15000	1500	13500	UNPAID	Administrator	Administrator	Administrator	Administrator	8/10/2023	Administrator	8/10/2023	
6	8/10/2023	Demo Video	SSS Salary Loan	NA	500	For Demo Video	2000	1000	1000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/10/2023	Administrator	8/10/2023	
7	8/11/2023	Giorno Giovanna	HDMF Loan	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
7	8/11/2023	Giorno Giovanna	HDMF Loan	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
7	8/11/2023	Giorno Giovanna	HDMF Loan	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
7	8/11/2023	Giorno Giovanna	HDMF Loan	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
8	8/11/2023	Jonathan Joestar	SSS Salary Loan	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
8	8/11/2023	Jonathan Joestar	SSS Salary Loan	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
8	8/11/2023	Jonathan Joestar	SSS Salary Loan	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
8	8/11/2023	Jonathan Joestar	SSS Salary Loan	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
9	8/11/2023	Joseph Joestar	SSS Calamity Loan	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
9	8/11/2023	Joseph Joestar	SSS Calamity Loan	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
9	8/11/2023	Joseph Joestar	SSS Calamity Loan	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
9	8/11/2023	Joseph Joestar	SSS Calamity Loan	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
10	8/11/2023	Dio Brando	Salary Advance	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
10	8/11/2023	Dio Brando	Salary Advance	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
10	8/11/2023	Dio Brando	Salary Advance	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
10	8/11/2023	Dio Brando	Salary Advance	NA	1000	NA	10000	4000	6000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/11/2023	Administrator	8/11/2023	
11	8/15/2023	Eudora A Albon	HDMF Loan	NA	350	NA	10000	1550	8450	UNPAID	Angelica Samson	Angelica Samson	Angelica Samson	Angelica Samson	8/15/2023	Angelica Samson	8/15/2023	
11	8/15/2023	Eudora A Albon	HDMF Loan	NA	350	NA	10000	1550	8450	UNPAID	Angelica Samson	Angelica Samson	Angelica Samson	Angelica Samson	8/15/2023	Angelica Samson	8/15/2023	
11	8/15/2023	Eudora A Albon	HDMF Loan	NA	350	NA	10000	1550	8450	UNPAID	Angelica Samson	Angelica Samson	Angelica Samson	Angelica Samson	8/15/2023	Angelica Samson	8/15/2023	
11	8/15/2023	Eudora A Albon	HDMF Loan	NA	350	NA	10000	1550	8450	UNPAID	Angelica Samson	Angelica Samson	Angelica Samson	Angelica Samson	8/15/2023	Angelica Samson	8/15/2023	
12	8/15/2023	Angela A Rey	SSS Calamity Loan	NA	510	NA	15000	1000	14000	UNPAID	Angelica Samson	Angelica Samson	Angelica Samson	Angelica Samson	8/15/2023	Angelica Samson	8/15/2023	
13	8/15/2023	Eudora A Albon	SSS Salary Loan	NA	310	NA	80000	1000	79000	UNPAID	Angelica Samson	Angelica Samson	Angelica Samson	Angelica Samson	8/15/2023	Angelica Samson	8/15/2023	
13	8/15/2023	Eudora A Albon	SSS Salary Loan	NA	310	NA	80000	1000	79000	UNPAID	Angelica Samson	Angelica Samson	Angelica Samson	Angelica Samson	8/15/2023	Angelica Samson	8/15/2023	
13	8/15/2023	Eudora A Albon	SSS Salary Loan	NA	310	NA	80000	1000	79000	UNPAID	Angelica Samson	Angelica Samson	Angelica Samson	Angelica Samson	8/15/2023	Angelica Samson	8/15/2023	
14	8/24/2023	Ato Ni Bai	Company Loan	NA	500	NA	20000	1000	19000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/24/2023	Angelica Samson	9/12/2023	
14	8/24/2023	Ato Ni Bai	Company Loan	NA	500	NA	20000	1000	19000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/24/2023	Angelica Samson	9/12/2023	
17	10/4/2023	Layla Santos	Company Loan	NA	512	NA	10000	1024	8976	UNPAID	Administrator	Administrator	Administrator	Administrator	10/4/2023	Administrator	10/4/2023	
18	10/4/2023	Layla Santos	MPL	NA	315	NA	5000	630	4370	UNPAID	Administrator	Administrator	Administrator	Administrator	10/4/2023	Administrator	10/4/2023	
19	10/4/2023	Melissa Salmorin	Company Loan	NA	435	NA	7000	870	6130	UNPAID	Administrator	Administrator	Administrator	Administrator	10/4/2023	Administrator	10/4/2023	
20	10/4/2023	Melissa Salmorin	MPL	NA	332	NA	8000	332	7668	UNPAID	Administrator	Administrator	Administrator	Administrator	10/4/2023	Administrator	10/4/2023	

Download CSV In Loan Detail

- Click the CSV button to download the CSV file



LoanNumber	LoanDate	EmployeeName	OtherDeduction	DocumentReference	Amortization	Remarks	LoanAmount	PaidAmount	BalanceAmount	Status	PreparedBy	CheckedBy	ApprovedBy	CreatedBy	CreatedDate	UpdatedBy	UpdatedDate	PayrollNumber	DeductionNumb
3	8/7/2023	Butch CaÃ±ada	SSS Calamity Loan	NA	500	NA	15000	0	15000	UNPAID	Administrator	Administrator	Administrator	Administrator	8/7/2023	Administrator	8/8/2023		

Other Income

Overview

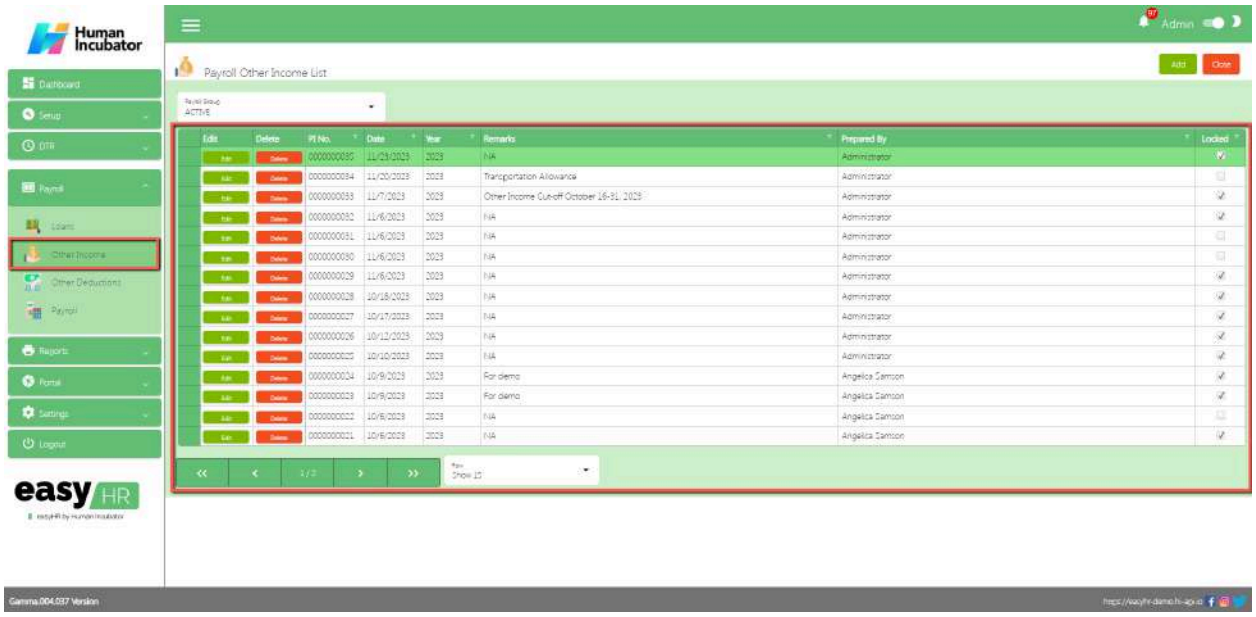
- Other Income is used to add other income to include to employee payroll and also the user can compute the 13th month for employees

Payroll Other Income List

- Shows all list of Payroll Other Income
- Select Payroll Group

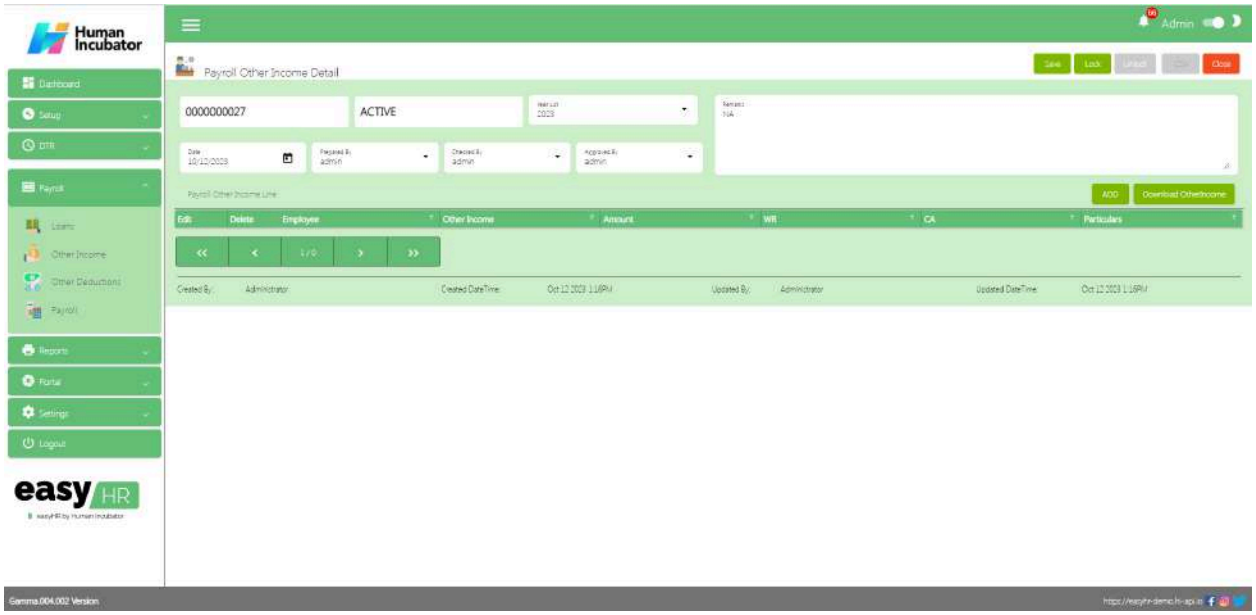
Column Table

- Edit: This has a function to edit the Other Income
- Delete: This has a function to delete the Other Income (Note: You will not be able to delete the Other income if the payroll connected is already locked)
- PI No.: This is for the Other Income number (Note: It will automatically generate according to the sequence of the added Other Income)
- Date: Date of the Other Income added
- Year: Year Date of the Other Income added
- Remarks: You can input any remarks
- Prepared By: Fullname of the user who added the Other Income
- Locked: Check if this is already locked



Payroll Other Income Detail

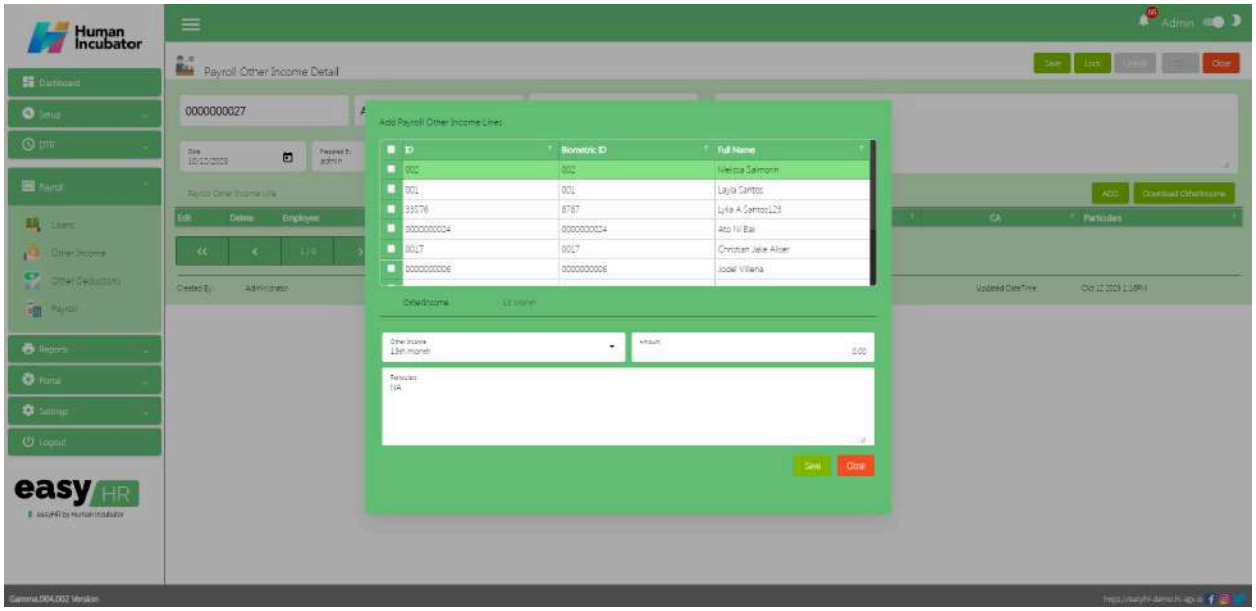
- To **Add** a new Payroll Other Income, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Loan detail like:
    - Input Remarks
    - Select Date
    - Select Prepared By
    - Select Checked By
    - Approved By



Add Payroll Other Income Lines

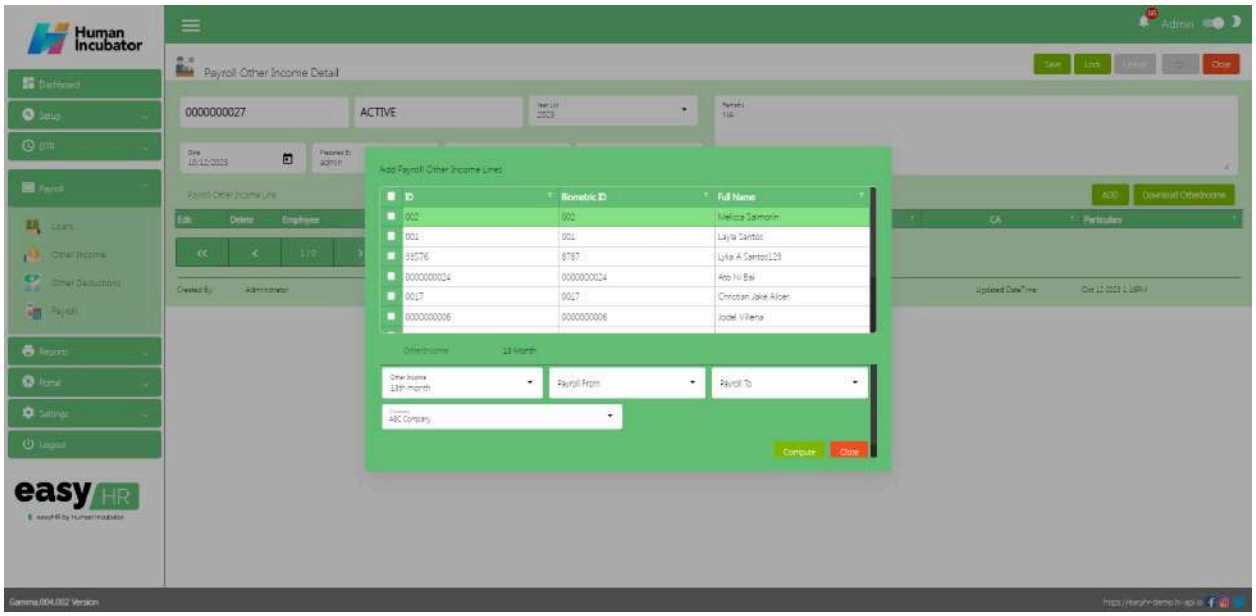
- To **Add** a manually Payroll Other Income lines, click the **Add** button
- There 2 tabs in add payroll other income lines
    - Select Employee
    - **OtherIncome** Tab and **13th Month** Tab

- In **Other Income** tab there are important fields need to fill up and select
    - Select Other Income Name
    - Input Amount
    - Input Particulars
    - Click **Save** button to add in Payroll Other Income Line



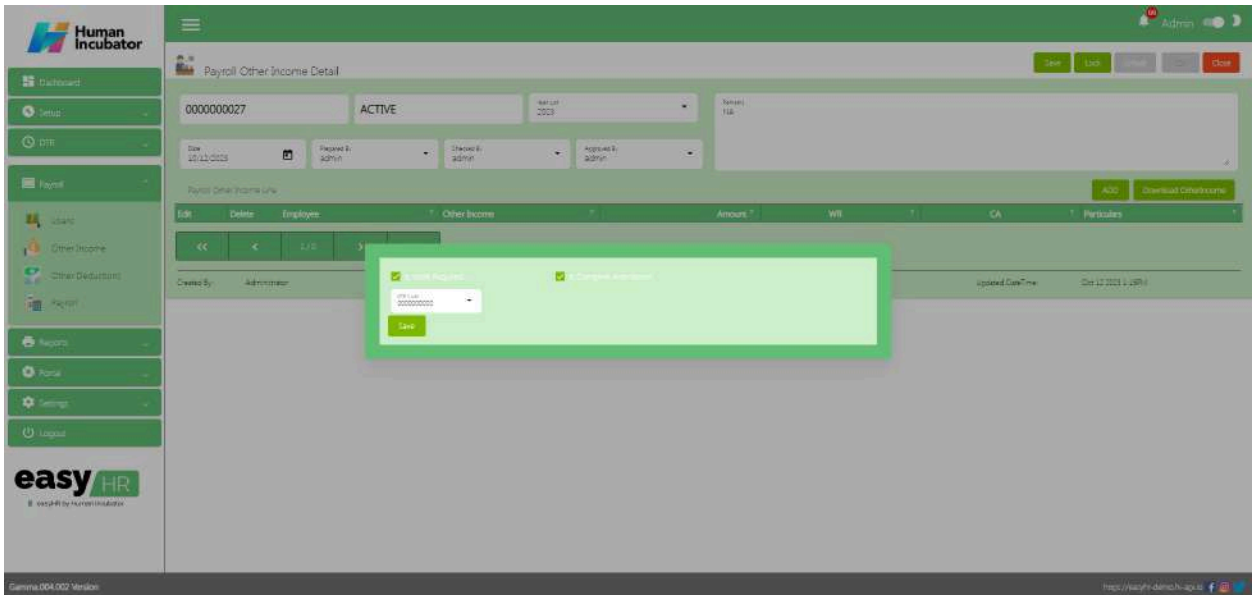
- In **13th Month** tab there are important fields need and select
    - Select 13th Month
    - Select Payroll From
    - Select Payroll To
    - Select Company

- Click **Compute** button to compute the 13th month



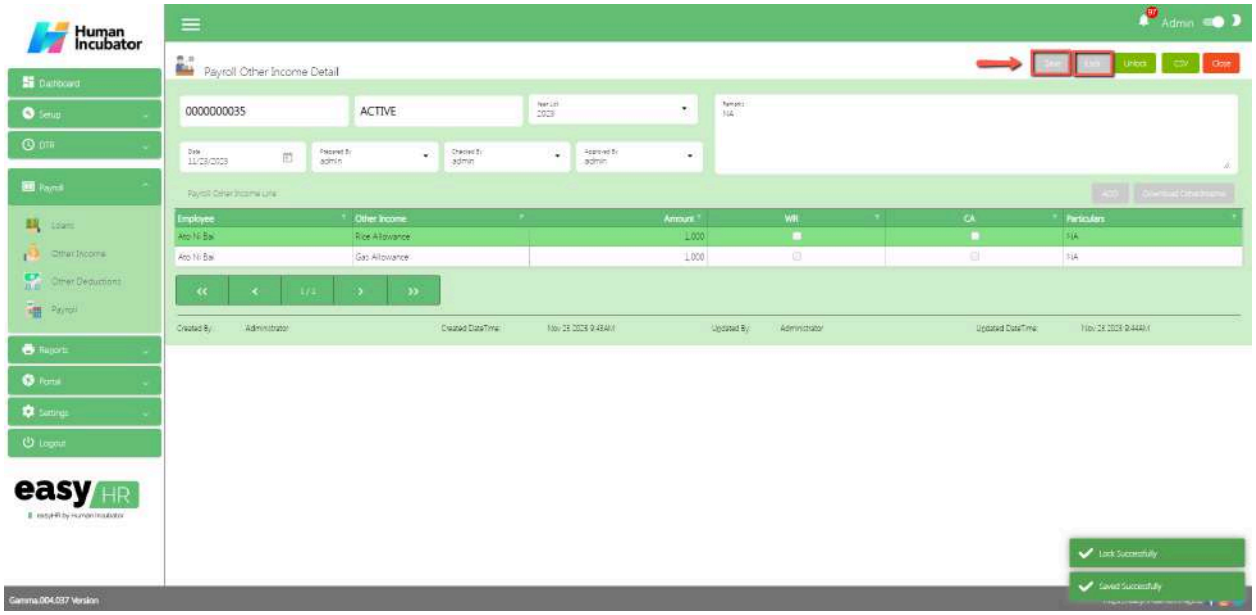
Download Other Income

- Click **Download Other Income** button to download the other Income of employee
    - Check the **Checkbox** if **Is Work Required** or **Is Complete Attendance**
    - Select DTR Code
    - Click **Save** button to add in Payroll Other Income Line



Save/Lock

- Make sure to save/lock so that this record is read and computed in the system also the Other Income code will be viewed in the Payroll module.



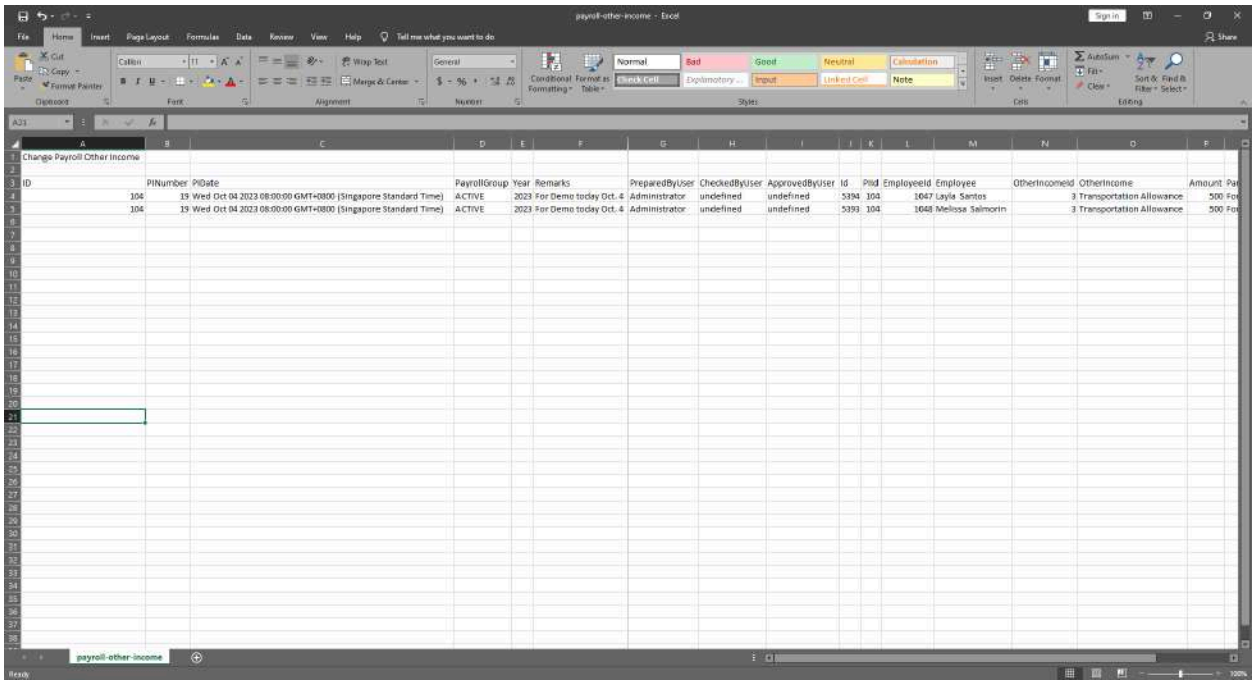
Column Detail

- Employee: Name of the Employee
- Other Income: Name of the Other Income
- Amount: Amount of the Other Income

- WR: Meaning “Work Required” the employee will only get the other income if the employee has a work
- CA: Meaning “Complete Attendance” the employee will only get the other income if the employee got Complete Attendance
- Particulars: You can input any remarks

Download CSV In Payroll Other Income Detail

- Click the CSV button to download the CSV file



Change Payroll Other Income

ID	PINumber	PIDate	PayrollGroup	Year	Remarks	PreparedByUser	CheckedByUser	ApprovedByUser	Id	PIId	EmployeeId	Employee	OtherIncomeId	OtherIncome	Amount
104	19	Wed Oct 04 2023 08:00:00 GMT+0800 (Singapore Standard Time)	ACTIVE	2023	For Demo today Oct. 4	Administrator	undefined	undefined	5394	104	1047	Layla Santos	3	Transportation Allowance	500
104	19	Wed Oct 04 2023 08:00:00 GMT+0800 (Singapore Standard Time)	ACTIVE	2023	For Demo today Oct. 4	Administrator	undefined	undefined	5393	104	1048	Melissa Salmorin	3	Transportation Allowance	500

Other Deductions

Overview

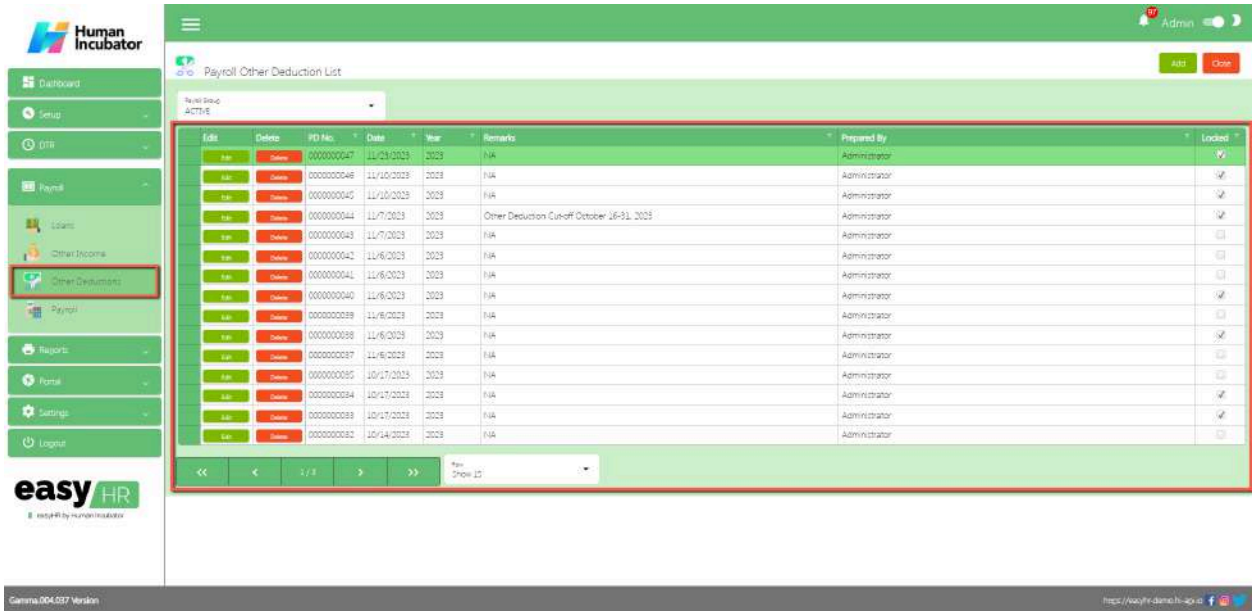
- Other Deduction is used generate the deduction or loans of employee and also the user can add the loan for the 1 time payment deduction

Payroll Other Deduction List

- Shows all the list of Payroll Other Deduction
- Select Payroll Group

Column Table:

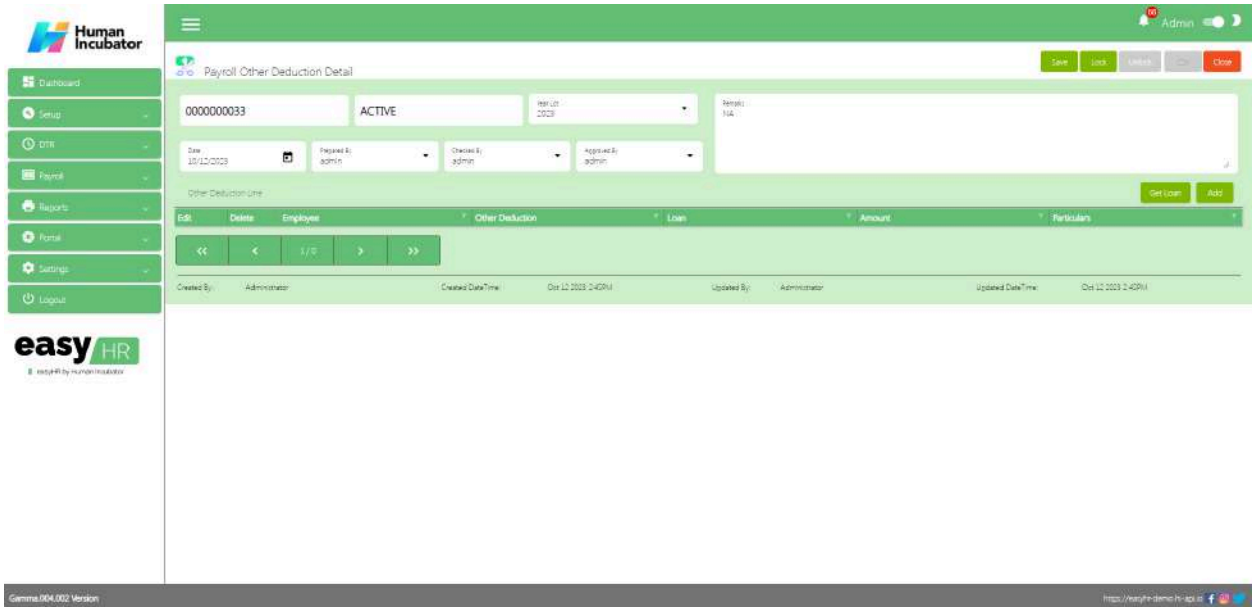
- Edit: This has a function to edit the Other Dedcuction
- Delete: This has a function to delete the Other Deduction (Note: You will not be able to delete the Other Deduction if the payroll connected is already locked)
- PD No.: This is for the Other Deduction number (Note: It will automatically generate according to the sequence of the added Other Deduction)
- Date: Date of the Other Deduction added
- Year: Year Date of the Other Deduction added
- Remarks: You can Input remarks
- Prepared By: Fullname of the user who added the Other Deduction
- Locked: Checked if this is already locked



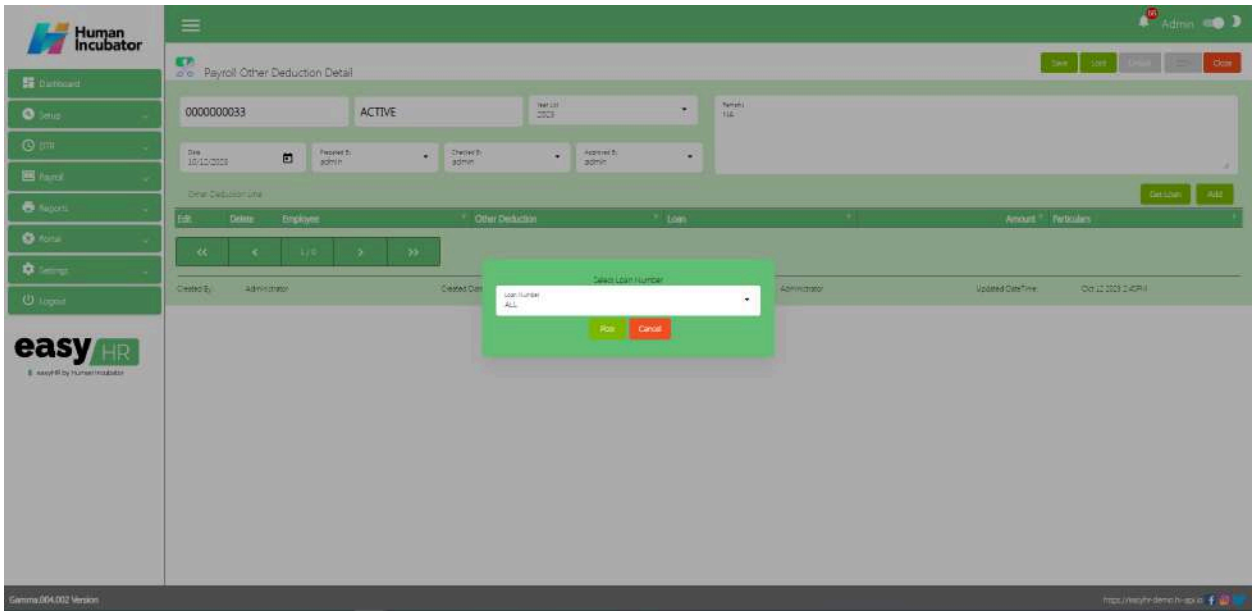
Payroll Other Deduction Detail

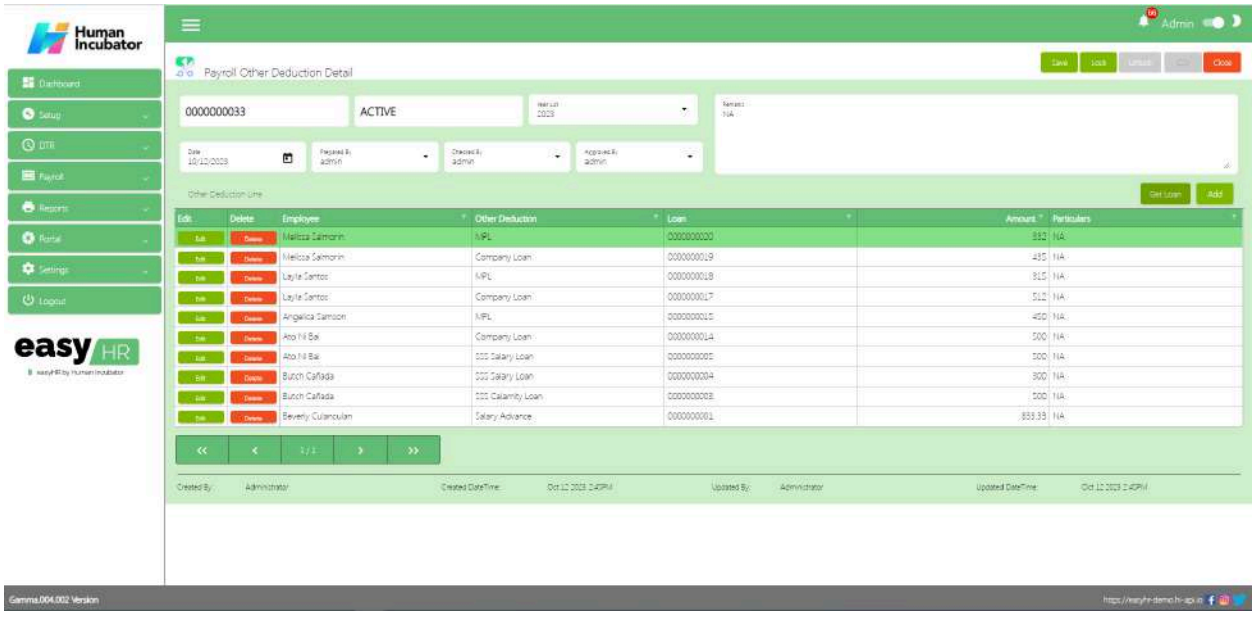
- To **Add** a new Payroll Other Deduction, click the **Add** button that can be seen on the right side of the screen

- Fill all the important fields in Loan detail like:
    - Select Checked By
    - Select Approved By
    - Input Remarks



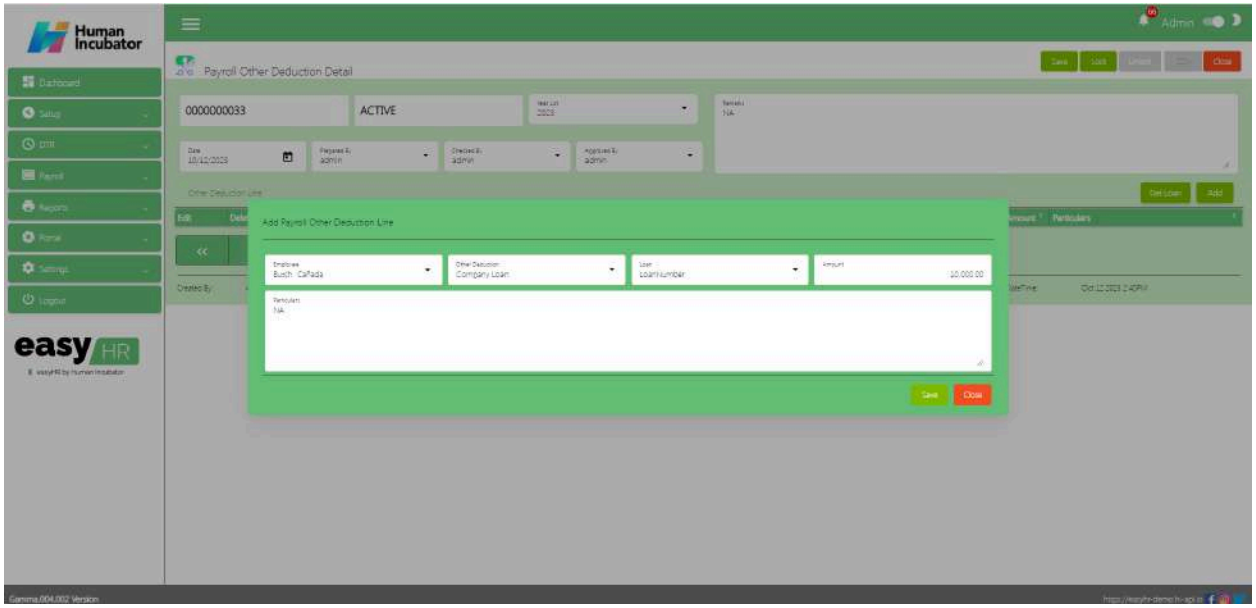
- Click **Get loan** button to get all employees loan
    - Select All to Loan Number
    - Click **Post** button to add in other deduction line

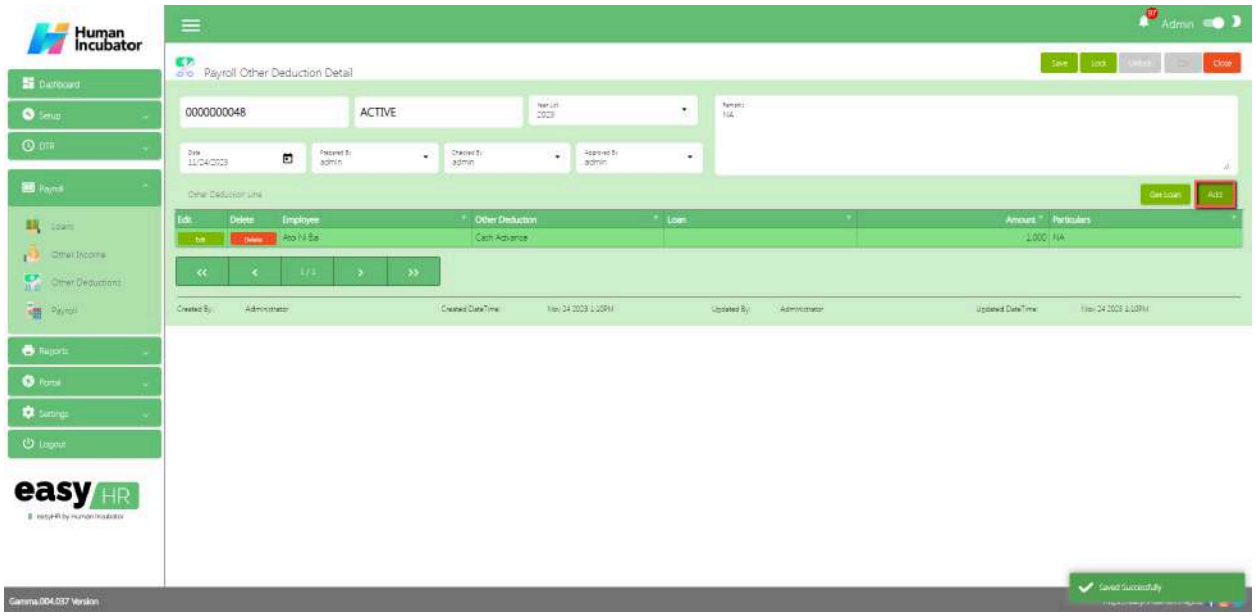




- Click **Add** button to manually or individually add a loan to the employee.

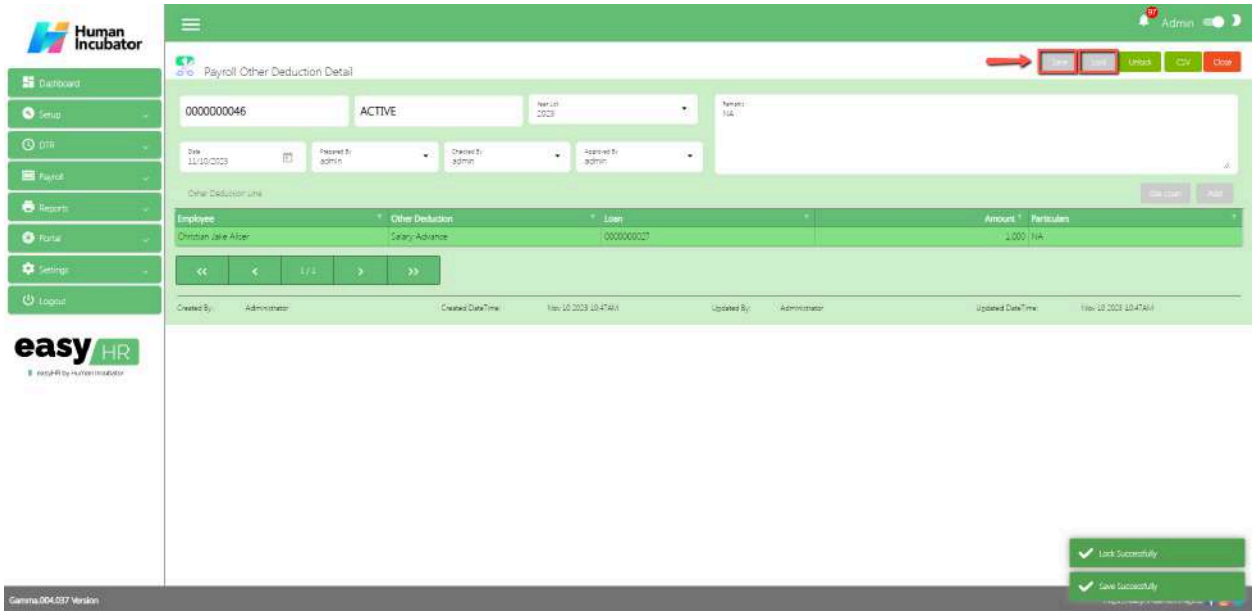
- Select Employee
- Select Other Deduction Name
- Select Loan Number
- Input Amount
- Click **Save** button to add in other deduction line





Save/Lock

- Make sure to save/lock so that this record is read and computed in the system also the Other Deduction code will be viewed in the Payroll module.



Column Table

- Employee: Name of the Employee
- Other Deduction: Name of the Other Deduction
- Loan: Loan number of the Employee
- Amount: Loan payment amount
- Particulars: You can add any particulars

Payroll

Overview

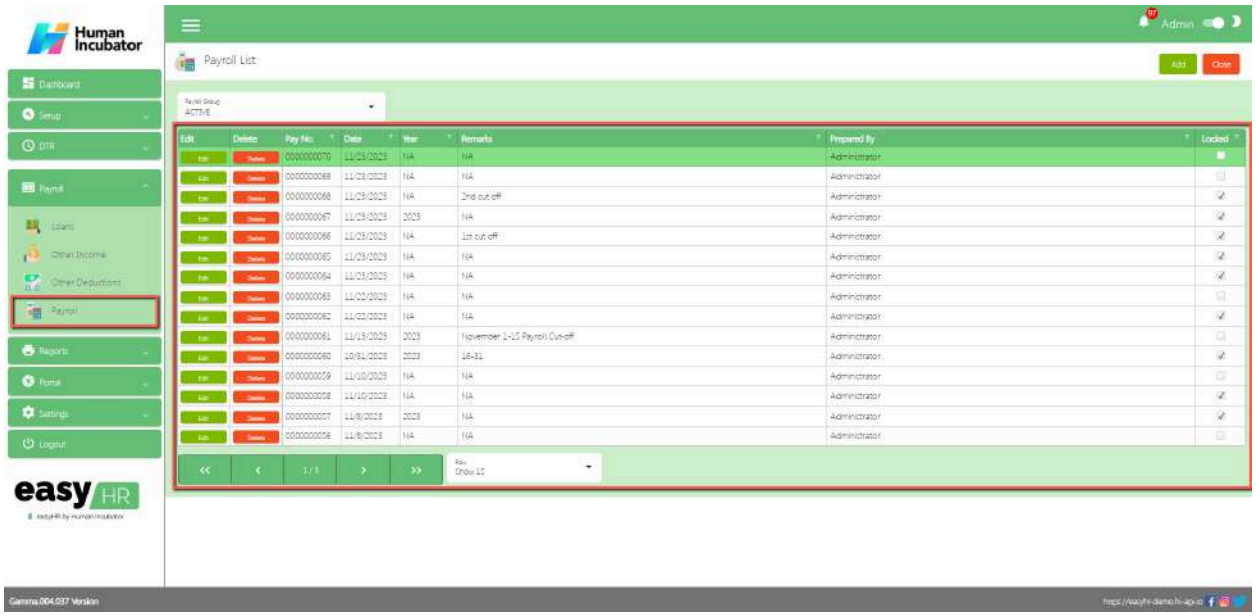
- Payroll is used to compute all the Deduction, Other Income, Daily rate, Monthly Rate, Net Income

Payroll List

- Shows all the list of Payroll
- Select Payroll Group

Column Table

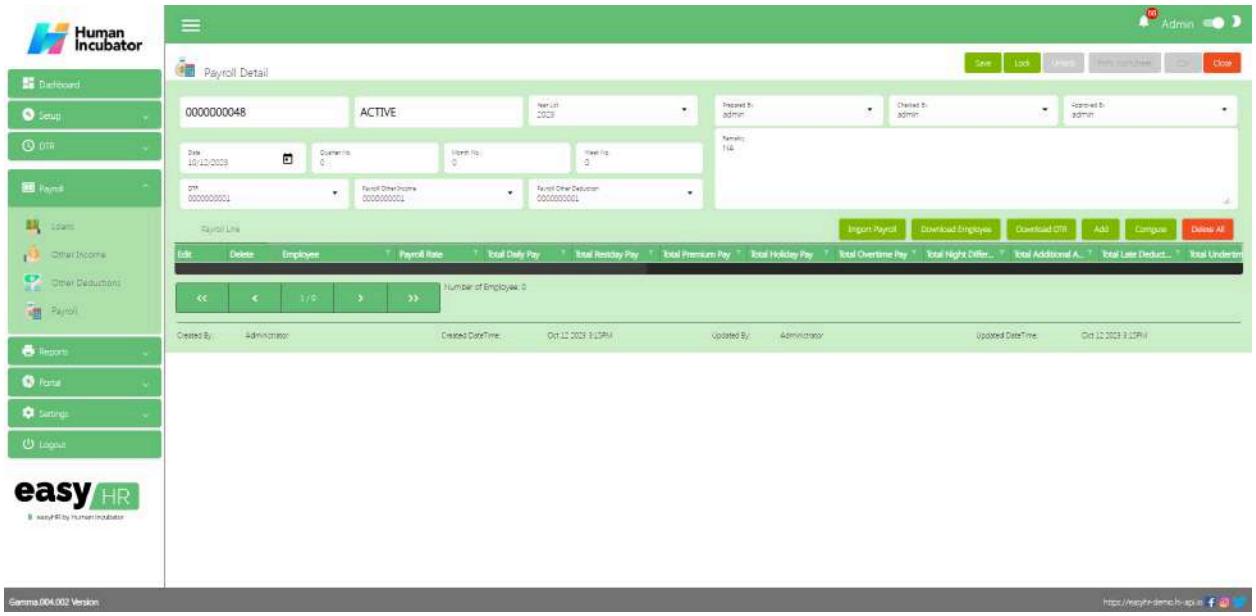
- Edit: This has a function to edit the Payroll
- Delete: This has a function to delete the Payroll (Note: You will not be able to delete the Payroll if it has still a Payroll lines)
- Pay No.: This is for the Payroll number (Note: It will automatically generate according to the sequence of the added Payroll)
- Date: Date of the Payroll added
- Year: Year Date of the Payroll added
- Remarks: You can Input any remarks
- Prepared By: Fullname of the User who added the Payroll
- Locked: Check if the Payroll is already locked.



Payroll Detail

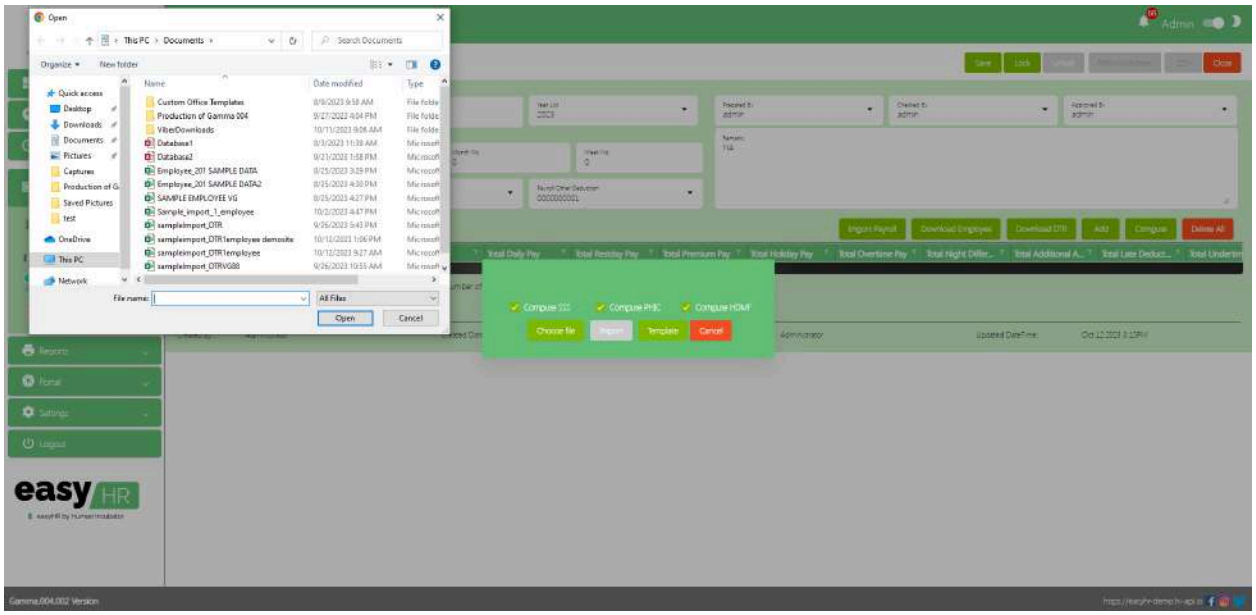
- To **Add** a new Payroll, click the **Add** button that can be seen on the right side of the screen
- Fill all the important fields in Payroll detail like:
    - Select Date
    - Input Quarter Number

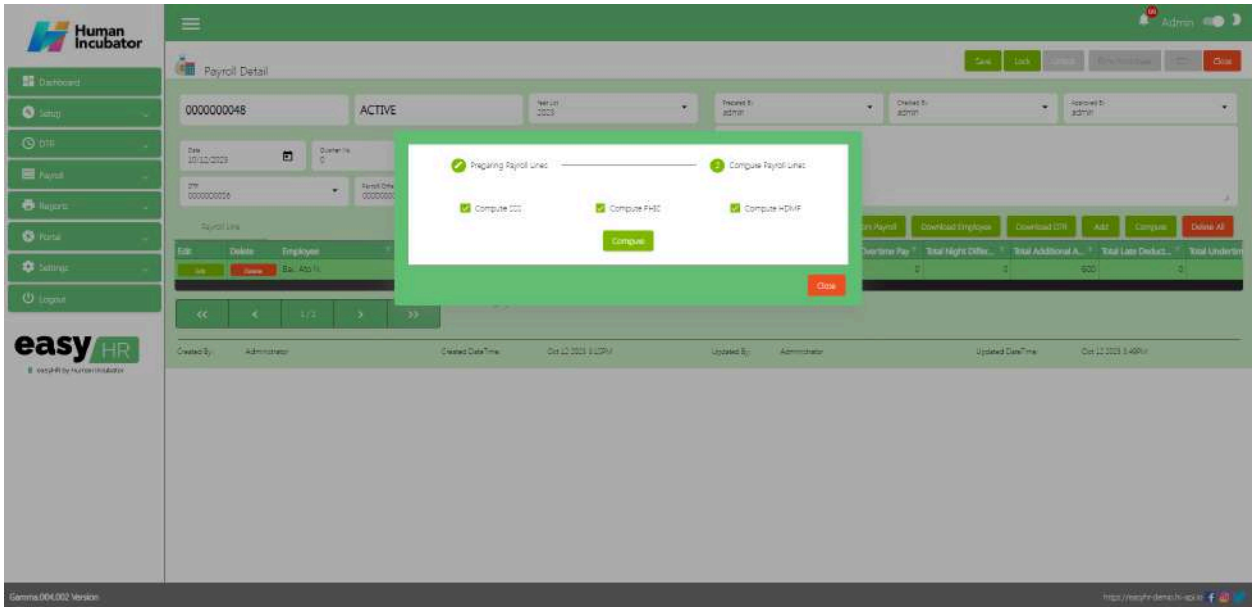
- Input Month Number
- Input Week Number (For Weekly Salary)
- Select DTR Number
- Select Payroll Other Income Number
- Select Payroll Other Deduction Number
- Select Checked By
- Select Approved By
- Input Remarks
- Click **Save** button to save all details



Import Payroll

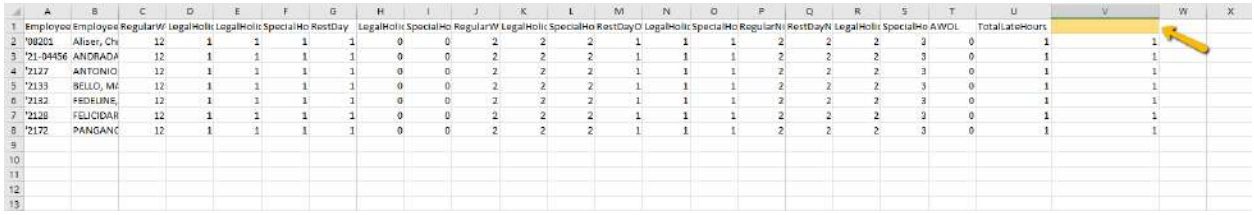
- Click **Import Payroll** button to import payroll master files
  - Click **Choose** file
  - Click **Open** file
  - Click **Import** (Employee payroll is successfully imported)
  - Click **Done** button
  - Click **Compute** button to Compute the Payroll line
  - Click **Next** button
  - Click **Compute** button to Compute your mandatory deduction
  - Click **Done** button



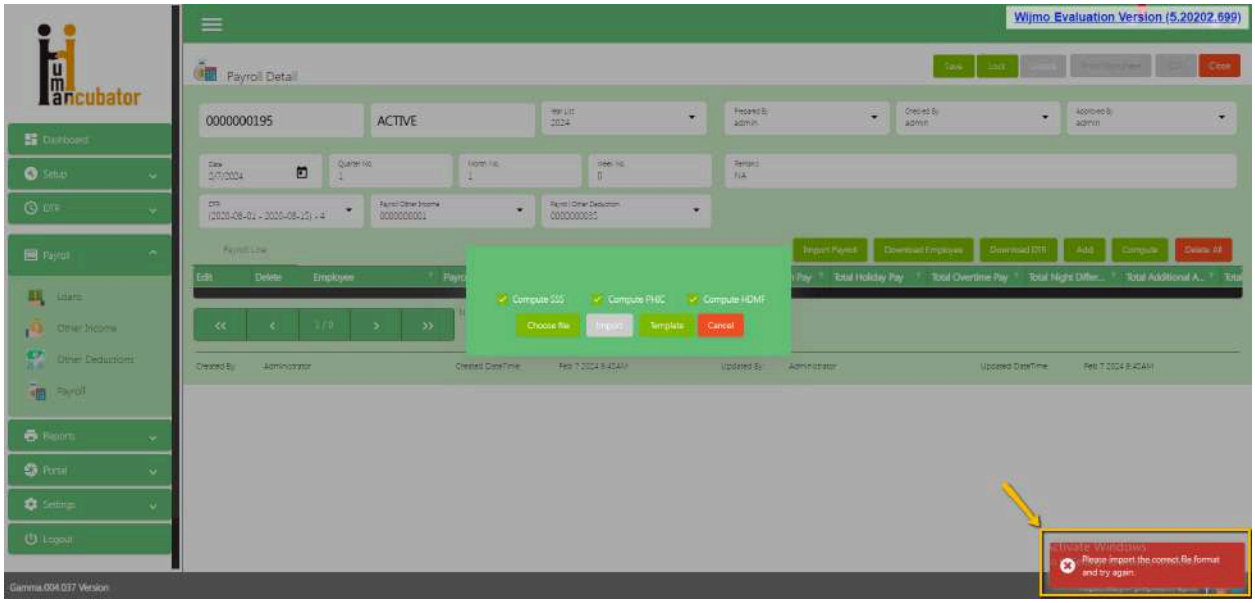


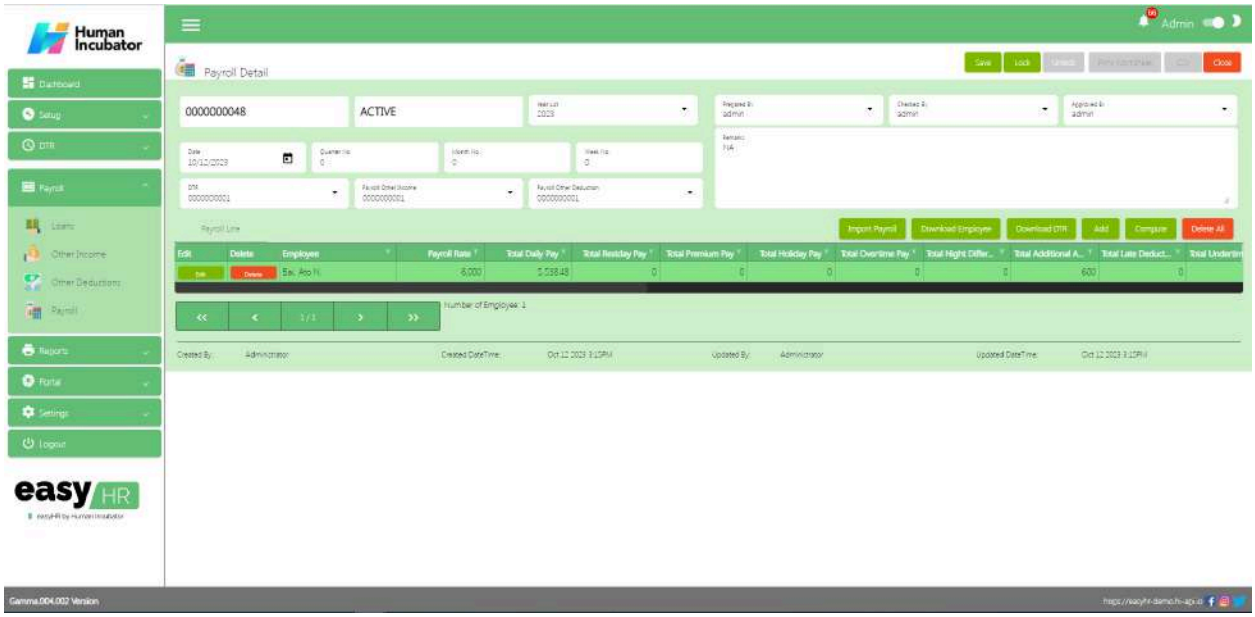
Import Payroll Incorrect File Format Error Message

- Edit excel file removed column name



- Import Excel file





Download Employee

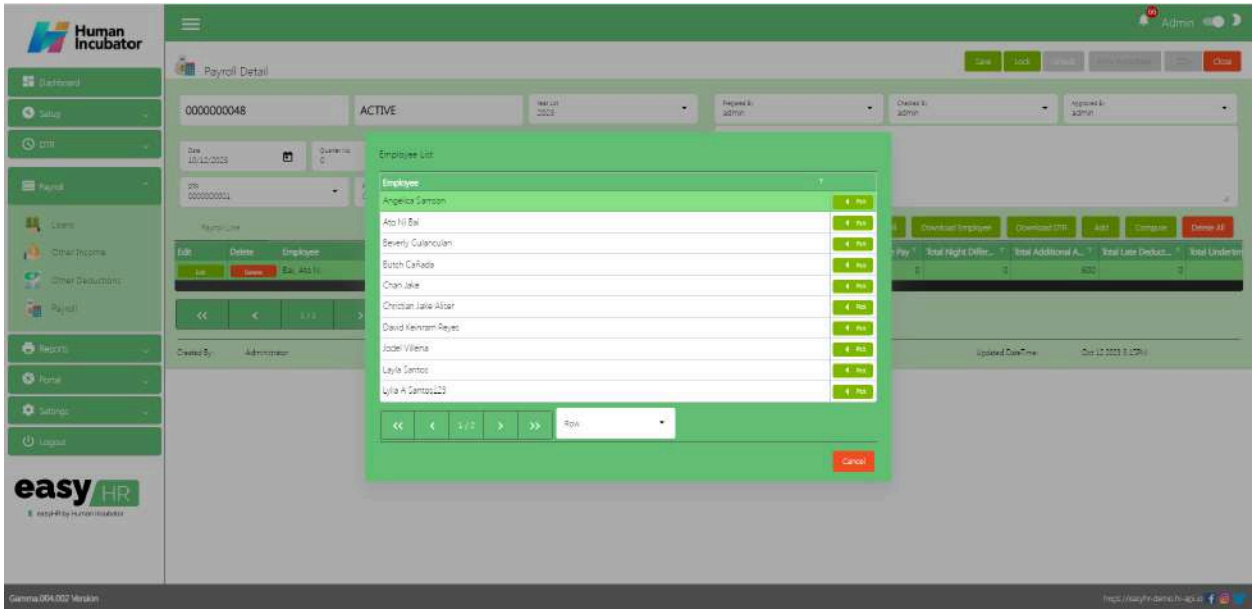
- Click **Download Employee** to Download individual employee

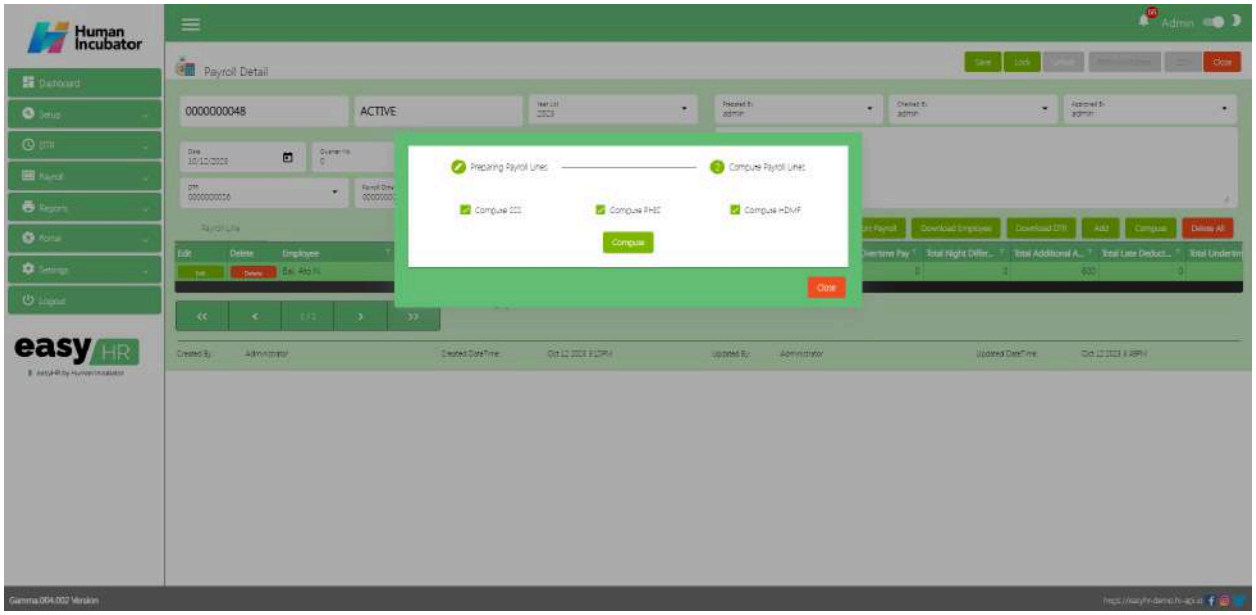
- Click **Pick** Employee in Employee list
- Click **Compute** button to Compute the Payroll line
- Click **Next** button
- Click **Compute** button to Compute your mandatory deduction

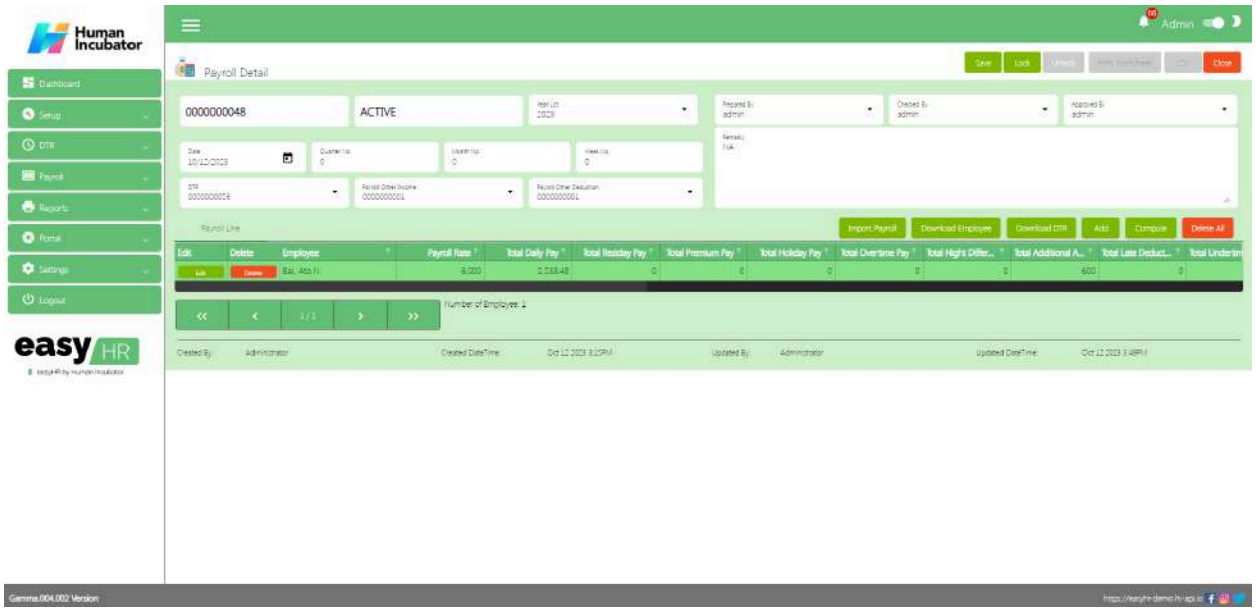
Note: The mandatory deduction will be based on the payroll rate for the first half and the deduction for the second half will deduct the remaining amount based on the monthly rate
Note: If the payroll rate exceeded 29,750 amount the SSS mandatory deduction will deduct fully in the first half but the deduction for the second half will be zero

		SSS	PHIC	HDMF Fixed Percentage	Tax
2	Rule	Based on SSS Table	2% of Gross Salary	2% of Gross Salary	Based on Table
3	Example: Gross Salary P29,750 Monthly Salary P59,500	The SSS Premium Contribution of **P1,350** will be a be deducted totaly in the first payroll cut off, and in the second payroll cut off the the SSS Contribution will be **zero**	The PHIC Premium contribution will be **P595** for the first Payroll cut off and for the second payroll cut off will be **P595** total of **P1,190** for the whole monthly contribution	The HDMF Premium contribution will be **P595** for the first Payroll cut off and for the second payroll cut off will be **P595** total of **P1,190** for the whole monthly contribution	
4	Example: Gross Salary P25,000 Monthly Salary P50,000	The SSS Premium Contribution for the first payroll cut off will be **P1,125** and in the second payroll cut off will be **P225** total of **P1350** for the whole monthly contribution	The PHIC Premium contribution will be **P500** for the first Payroll cut off and for the second payroll cut off will be **P500** total of **P1,000** for the whole monthly contribution	The HDMF Premium contribution will be **P500** for the first Payroll cut off and for the second payroll cut off will be **P500** total of **P1,000** for the whole monthly contribution	
5	Example: Gross Salary P20,000 Monthly Salaray P40,000	The SSS Premium Contribution for the first payroll cut off will be **P900** and in the second payroll cut off will be **P450** total of **P1350** for the whole monthly contribution	The PHIC Premium contribution will be **P400** for the first Payroll cut off and for the second payroll cut off will be **P400** total of **P800** for the whole monthly contribution	The HDMF Premium contribution will be **P400** for the first Payroll cut off and for the second payroll cut off will be **P400** total of **P800** for the whole monthly contribution	
6	Example: Gross Salary P15,000 Monthly Salary P30,000	The SSS Premium Contribution for the first payroll cut off will be **P675** and in the second payroll cut off will be **P675** total of **P1350** for the whole monthly contribution	The PHIC Premium contribution will be **P300** for the first Payroll cut off and for the second payroll cut off will be **P300** total of **P600** for the whole monthly contribution	The HDMF Premium contribution will be **P300** for the first Payroll cut off and for the second payroll cut off will be **P300** total of **P600** for the whole monthly contribution	
7	Example: Gross Salary P10,000 Monthly Salary P20,000	The SSS Premium Contribution for the first payroll cut off will be **P450** and in the second payroll cut off will be **P450** total of **P900** for the whole monthly contribution	The PHIC Premium contribution will be **P200** for the first Payroll cut off and for the second payroll cut off will be **P200** total of **P400** for the whole monthly contribution	The HDMF Premium contribution will be **P200** for the first Payroll cut off and for the second payroll cut off will be **P200** total of **P400** for the whole monthly contribution	
8	Example: Gross Salary P5,000 Monthly Salary P10,000	The SSS Premium Contribution for the first payroll cut off will be **P225** and in the second payroll cut off will be **P225** total of **P450** for the whole monthly contribution	The PHIC Premium contribution will be **P200** for the first Payroll cut off and for the second payroll cut off will be **zero** total of P200 for the whole monthly contribution	The HDMF Premium contribution will be **P100** for the first Payroll cut off and for the second payroll cut off will be **P100** total of **P200** for the whole monthly contribution	

- Click **Done** button

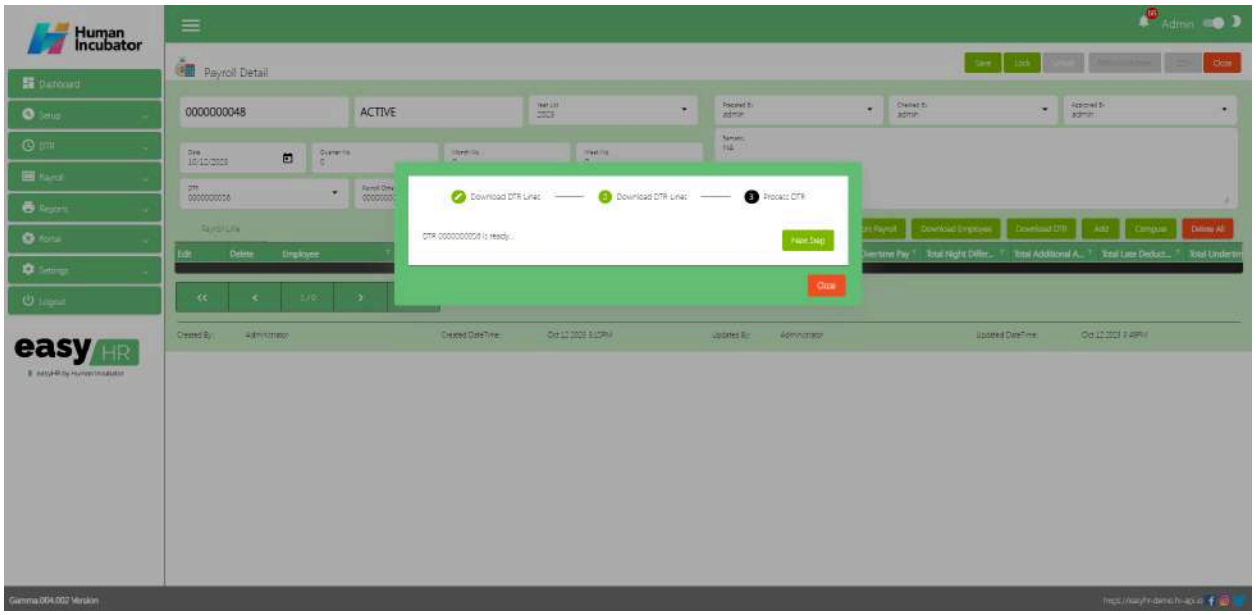

Human Incubator
Payroll Detail
0000000048
ACTIVE
Employee List
Employee
Angelica Samson
Ato Ni Bai
Beverly Culanculan
Butch Cañada
Chan Jake
Christian Jake Alcar
David Kevinsm Reyes
Jodel Villena
Layla Santos
Lyka A Santos123
Cancel
easy HR

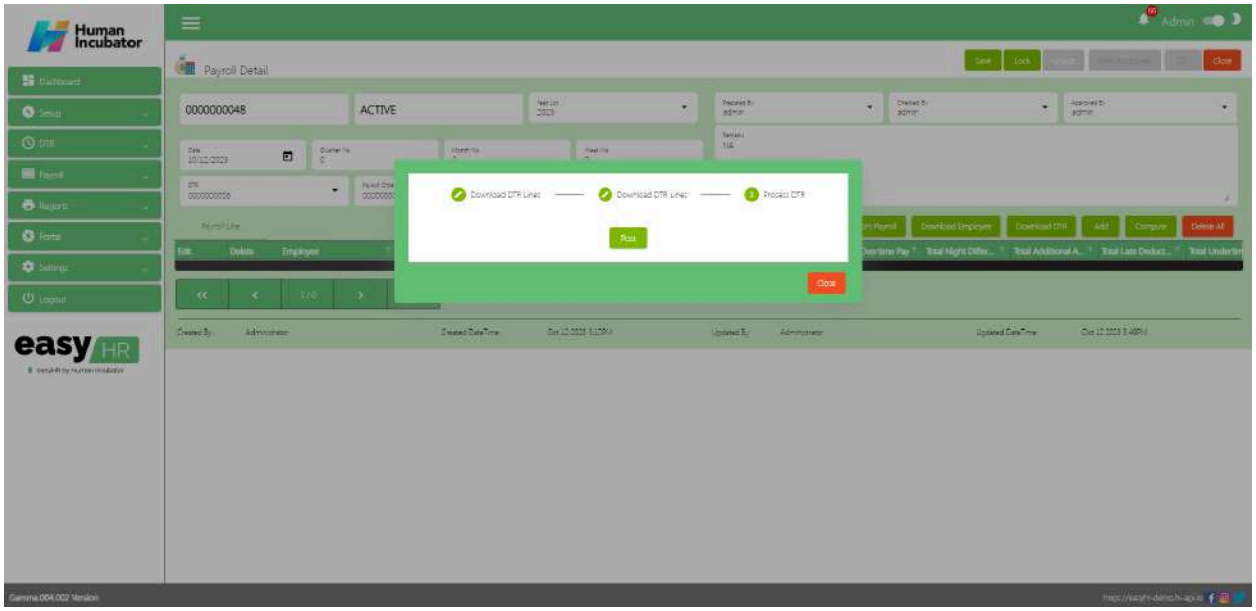

Human Incubator
Payroll Detail
0000000048
ACTIVE
Preparing Payroll Lines
Compute Payroll Lines
Compute SSS
Compute PHIC
Compute HDMF
Compute
Close
easy HR

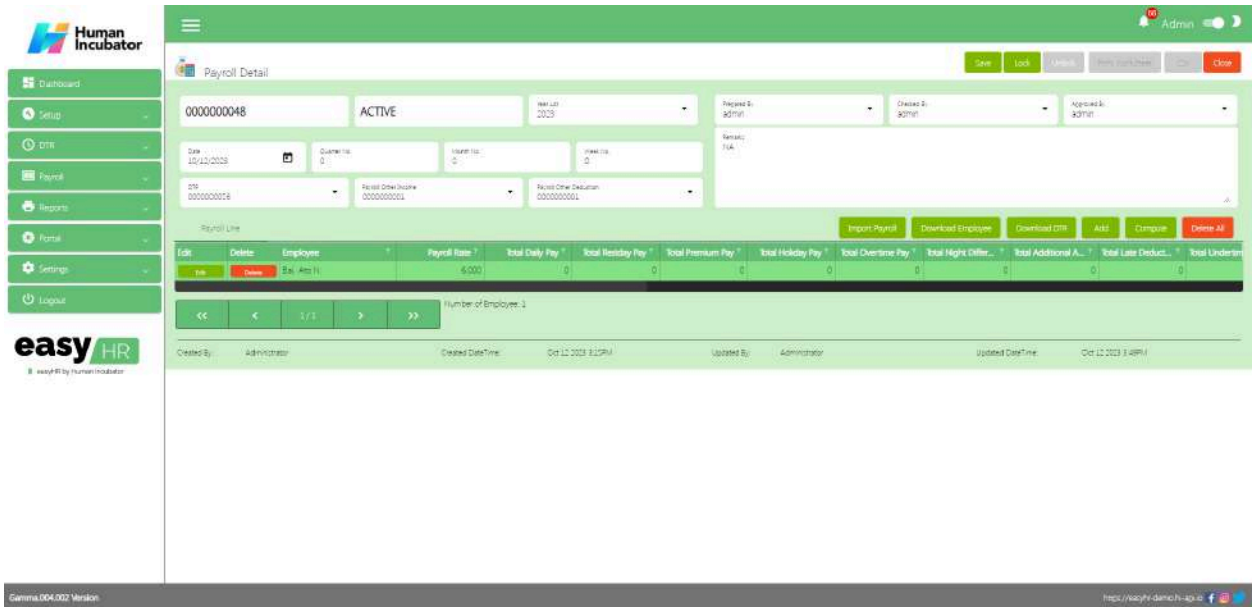


Download DTR

- Click **Download DTR** to Download all DTR of employees from the DTR module
    - Click **Next** button
    - Click **Post** button (Processing..)
    - Click **Done** button to add in payroll line


Human Incubator
Payroll Detail
0000000048
ACTIVE
Download DTR Lines
Download DTR Lines
Process DTR
Next Step
Close
easy HR


Human Incubator
Payroll Detail
0000000048
ACTIVE
Download DTR Lines
Download DTR Lines
Process DTR
Post
Close
easy HR



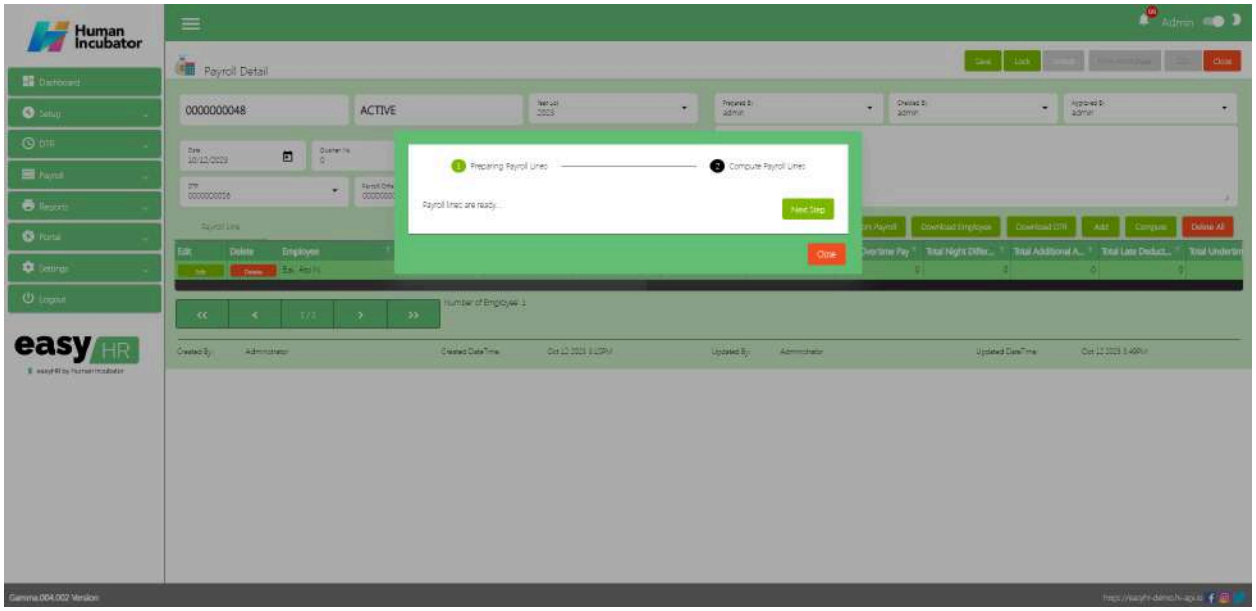
- Click **Compute** button to Compute the Payroll line
- Click **Next** button
- Click **Compute** button to Compute your mandatory deduction

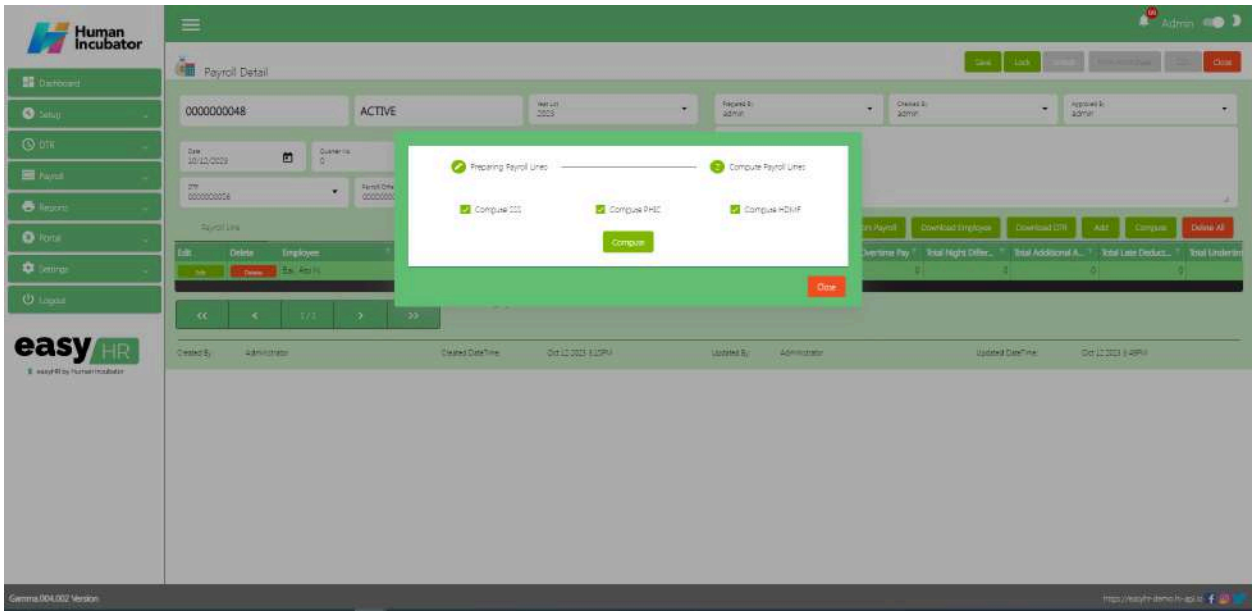
Note: The mandatory deduction will be based on the payroll rate for the first half and the deduction for the second half will deduct the remaining amount based on the monthly rate

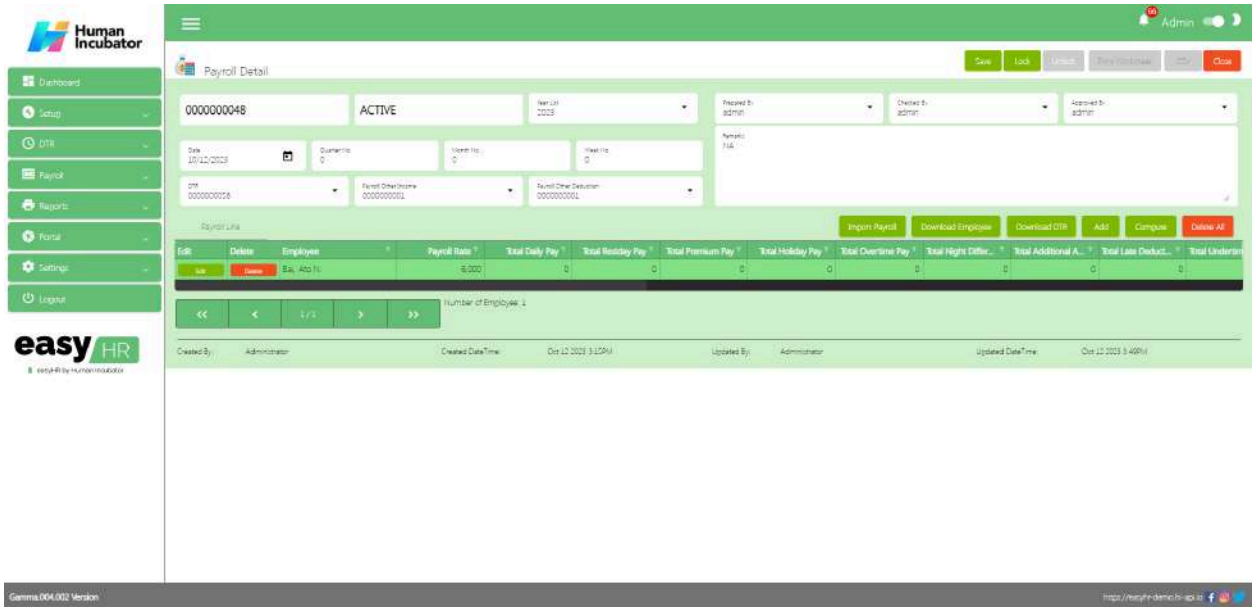
Note: If the payroll rate exceeded 29,750 amount the SSS mandatory deduction will deduct fully in the first half but the deduction for the second half will be zero

		SSS	PHIC	HDMF Fixed Percentage	Tax
2	Rule	Based on SSS Table	2% of Gross Salary	2% of Gross Salary	Based on Table
3	Example: Gross Salary P29,750 Monthly Salary P59,500	The SSS Premium Contribution of **P1,350** will be a be deducted totaly in the first payroll cut off, and in the second payroll cut off the the SSS Contribution will be **zero**	The PHIC Premium contribution will be **P595** for the first Payroll cut off and for the second payroll cut off will be **P595** total of **P1,190** for the whole monthly contribution	The HDMF Premium contribution will be **P595** for the first Payroll cut off and for the second payroll cut off will be **P595** total of **P1,190** for the whole monthly contribution	
4	Example: Gross Salary P25,000 Monthly Salary P50,000	The SSS Premium Contribution for the first payroll cut off will be **P1,125** and in the second payroll cut off will be **P225** total of **P1350** for the whole monthly contribution	The PHIC Premium contribution will be **P500** for the first Payroll cut off and for the second payroll cut off will be **P500** total of **P1,000** for the whole monthly contribution	The HDMF Premium contribution will be **P500** for the first Payroll cut off and for the second payroll cut off will be **P500** total of **P1,000** for the whole monthly contribution	
5	Example: Gross Salary P20,000 Monthly Salaray P40,000	The SSS Premium Contribution for the first payroll cut off will be **P900** and in the second payroll cut off will be **P450** total of **P1350** for the whole monthly contribution	The PHIC Premium contribution will be **P400** for the first Payroll cut off and for the second payroll cut off will be **P400** total of **P800** for the whole monthly contribution	The HDMF Premium contribution will be **P400** for the first Payroll cut off and for the second payroll cut off will be **P400** total of **P800** for the whole monthly contribution	
6	Example: Gross Salary P15,000 Monthly Salary P30,000	The SSS Premium Contribution for the first payroll cut off will be **P675** and in the second payroll cut off will be **P675** total of **P1350** for the whole monthly contribution	The PHIC Premium contribution will be **P300** for the first Payroll cut off and for the second payroll cut off will be **P300** total of **P600** for the whole monthly contribution	The HDMF Premium contribution will be **P300** for the first Payroll cut off and for the second payroll cut off will be **P300** total of **P600** for the whole monthly contribution	
7	Example: Gross Salary P10,000 Monthly Salary P20,000	The SSS Premium Contribution for the first payroll cut off will be **P450** and in the second payroll cut off will be **P450** total of **P900** for the whole monthly contribution	The PHIC Premium contribution will be **P200** for the first Payroll cut off and for the second payroll cut off will be **P200** total of **P400** for the whole monthly contribution	The HDMF Premium contribution will be **P200** for the first Payroll cut off and for the second payroll cut off will be **P200** total of **P400** for the whole monthly contribution	
8	Example: Gross Salary P5,000 Monthly Salary P10,000	The SSS Premium Contribution for the first payroll cut off will be **P225** and in the second payroll cut off will be **P225** total of **P450** for the whole monthly contribution	The PHIC Premium contribution will be **P200** for the first Payroll cut off and for the second payroll cut off will be **zero** total of P200 for the whole monthly contribution	The HDMF Premium contribution will be **P100** for the first Payroll cut off and for the second payroll cut off will be **P100** total of **P200** for the whole monthly contribution	

- Click **Done** button

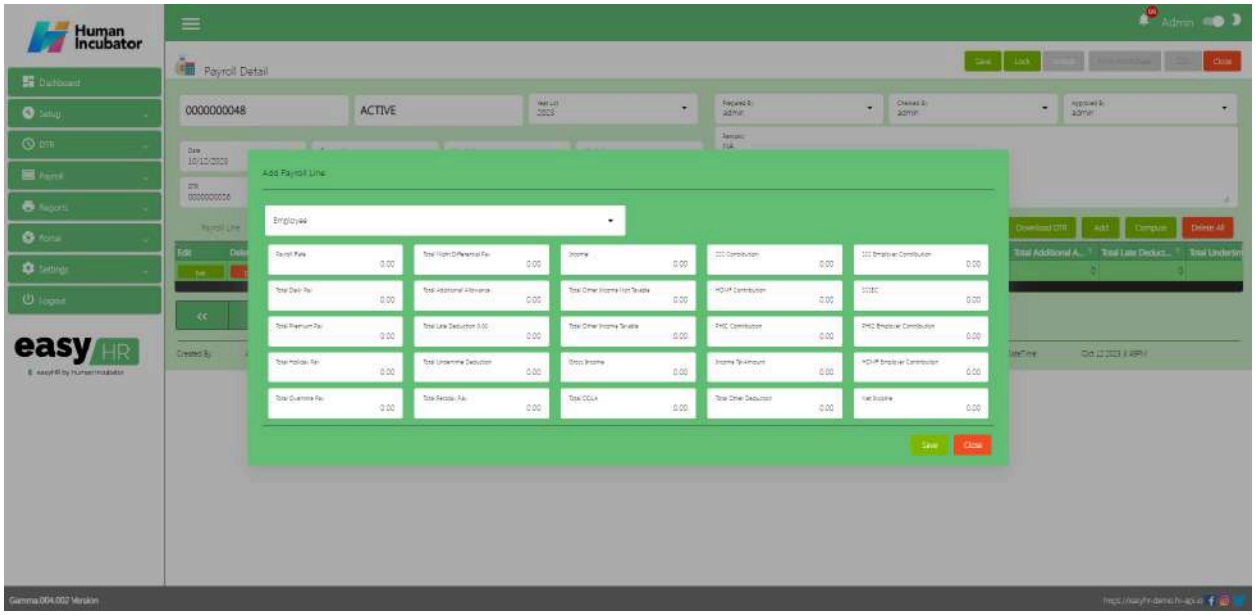



Human Incubator
Payroll Detail
0000000048
ACTIVE
Preparing Payroll Lines
Compute Payroll Lines
Compute SSS
Compute PHIC
Compute HDMF
Compute
Close
easy HR


Human Incubator
Payroll Detail
0000000048
ACTIVE
Save
Lock
Close
Import Payroll
Download Employee
Download DTR
Add
Compute
Delete All
Edit
Delete
Employee
Payroll Rate
Total Daily Pay
Total Restday Pay
Total Premium Pay
Total Holiday Pay
Total Overtime Pay
Total Night Differ...
Total Additional A...
Total Late Deduct...
Total Undertim
Number of Employee: 1
Created By:
Administrator
Created DateTime:
Updated By:
Updated DateTime:
easy HR

Add

- Click **Add** button to manually add payroll line
    - Select Employee
    - Fill all the important fields in Add Payroll Line
    - Click **Save** button to add payroll line

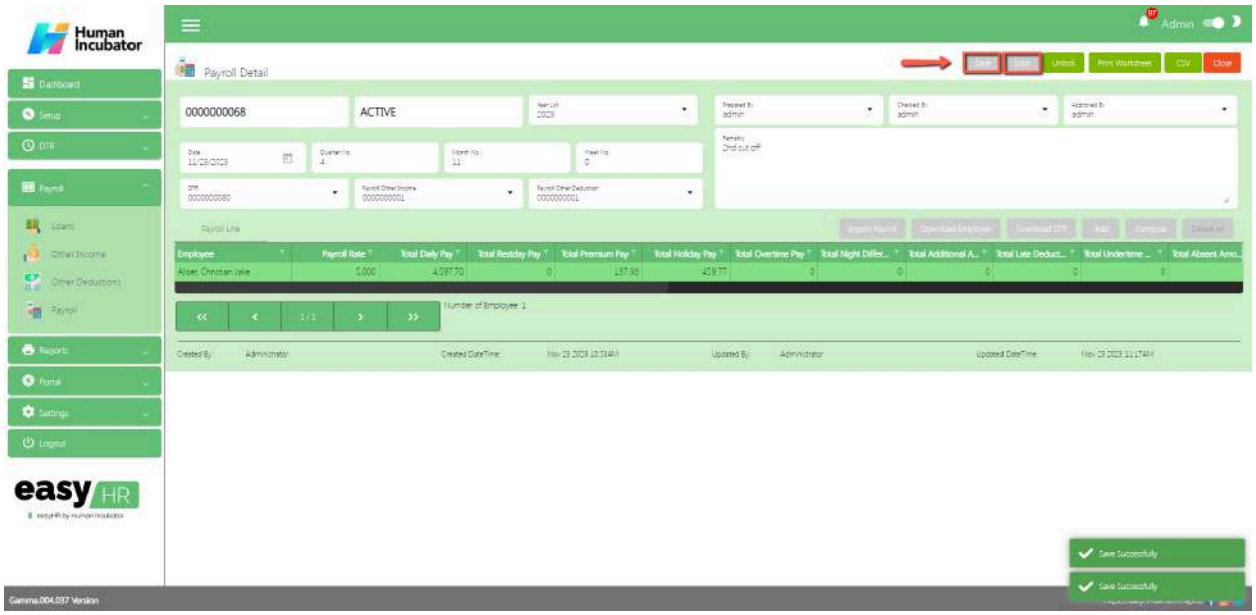


Delete All

- Click **Delete** button to delete all payroll line
    - Click **Yes** to delete

Save/Lock

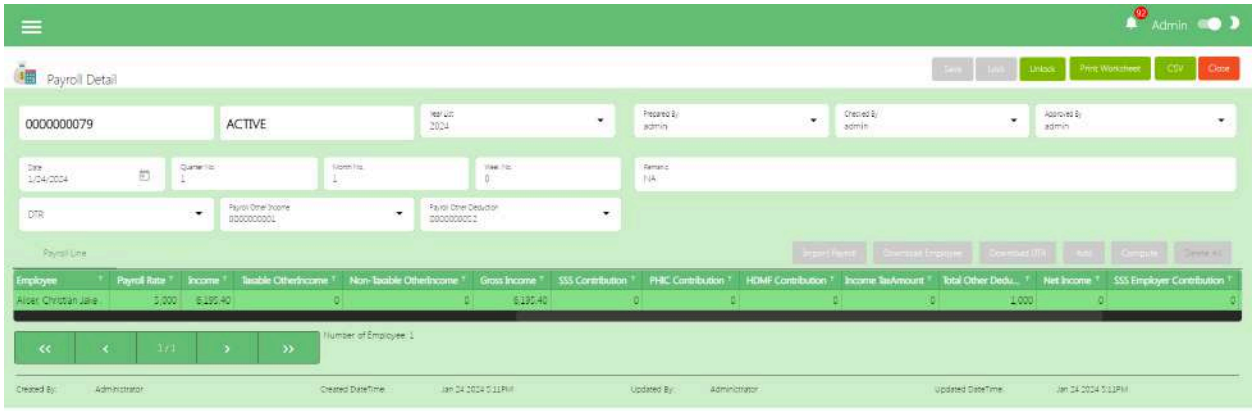
- Make sure to save/lock so that this record is displayed in the reports module.

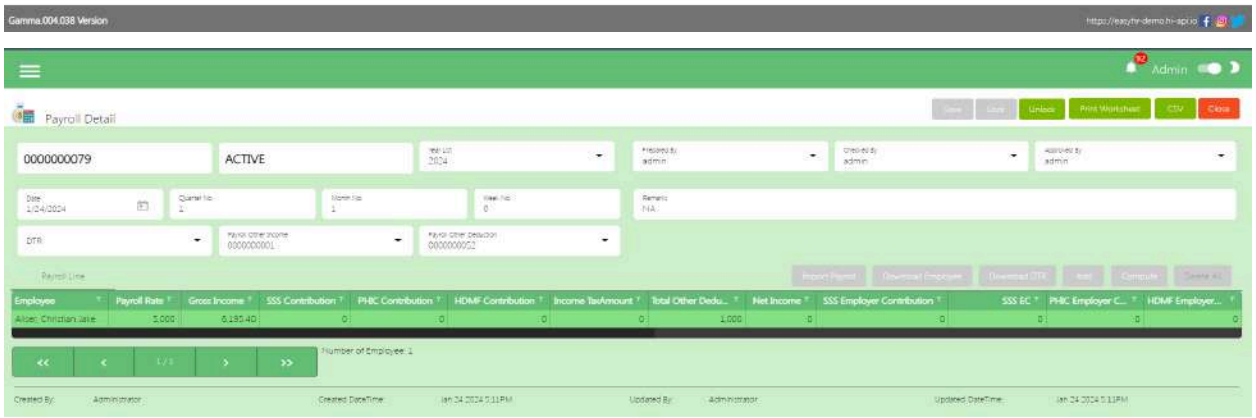


Column Table

- Employee: Name of the Employee
- Payroll Rate: Payroll Rate of the Employee
- Total Daily Pay: Total Daily Pay of the Employee based of the number of working days
- Total Restday Pay: Total Restday Pay of the Employee
- Total Premium Pay: Total Premium Pay of the Employee (Note: Premium Pay means Special Holiday Pay)
- Total Holiday Pay: Total Holiday Pay of the Employee (Note: Holiday Pay means Regular Holiday Pay)
- Total Overtime Pay: Total Overtime of the Employee
- Total Night Differential: Total Night Differential Pay of the Employee
- Total Additional Allowance: Total Additional Allowances of the Employee
- Total Late Deduction: Total Late Deduction of the Employee
- Total Undertime Deduction: Total Undertime Deduction of the Employee
- Total Absent Amount: Total Absent Amount of the Employee
- Income: Total Income of the Employee
- Taxable OtherIncome: Taxable Income of the Employee
- Non-Taxable Other Income: Non-Taxable Income of the Employee
- Gross Income: Total Gross Income of the Employee (Note: If the Employee has Taxable or Non-Taxable Income it will be added in total in the Gross Income)

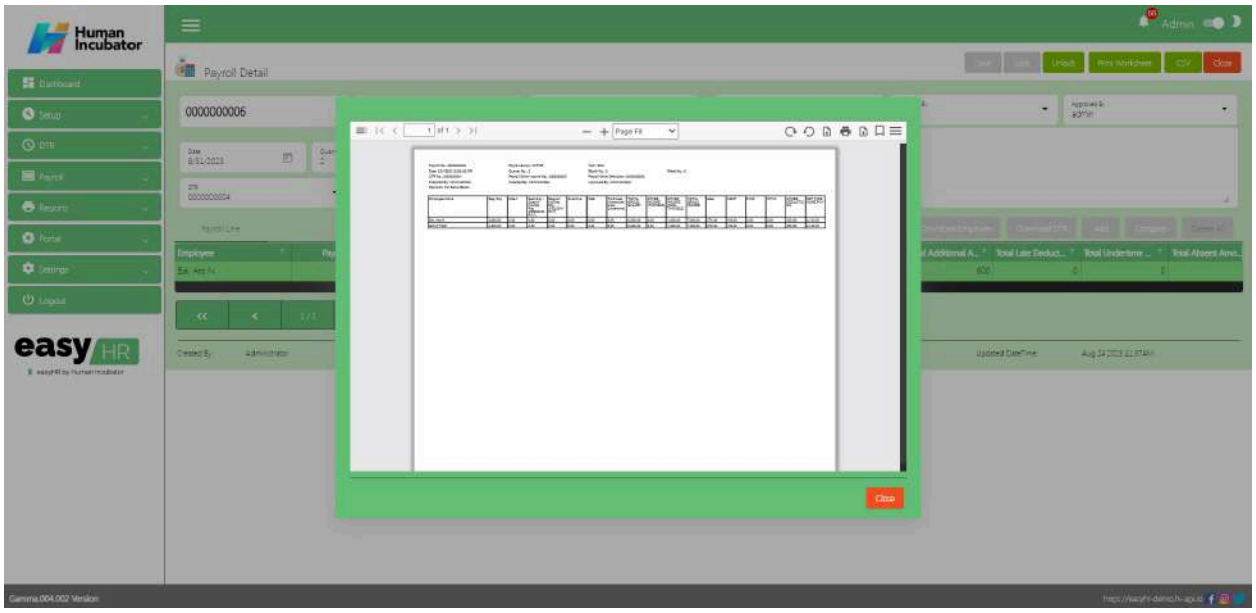
- SSS Contribution: SSS Contribution of the Employee
- PHIC Contribution: PHIC Contribution of the Employee
- HDMF Contribution: HDMF Contribution of the Employee
- Income Tax Amount: Income Tax Amount of the Employee
- Total Other Deductions: Total Other Deductions of the Employee
- Net Income: Total Net Income of the Employee (Note: This includes all Other Incomes and All Deductions such as Mandatory Deductions, Tax Deductions and Other Deductions of the Employee)
- SSS Employer Contribution: SSS Contribution of the Employer
- SSS EC: SSS EC of the Employer
- PHIC Employer Contribution: PHIC Contribution of the Employer
- HDMF Employer Contribution: HDMF Contribution of the Employer





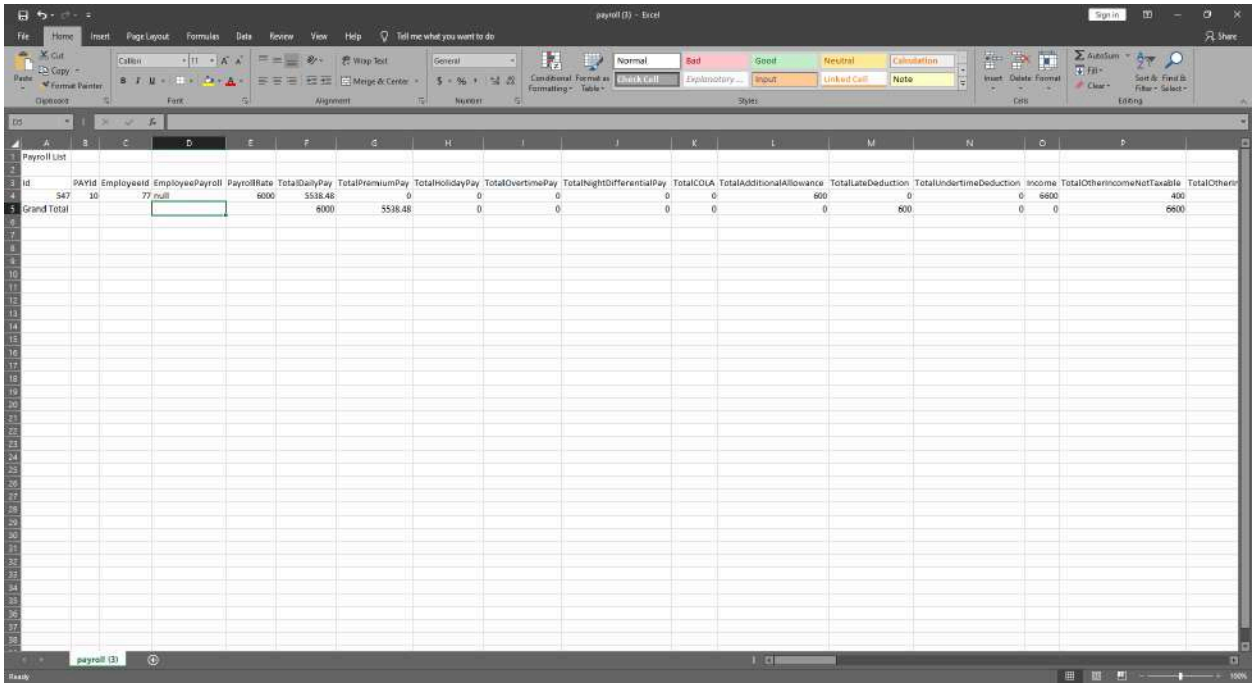
Print WorkSheet

- Click **Print WorkSheet** if the user want to print payroll line



Download CSV

- Click the **CSV** button to download the CSV file



Section VII: Reports

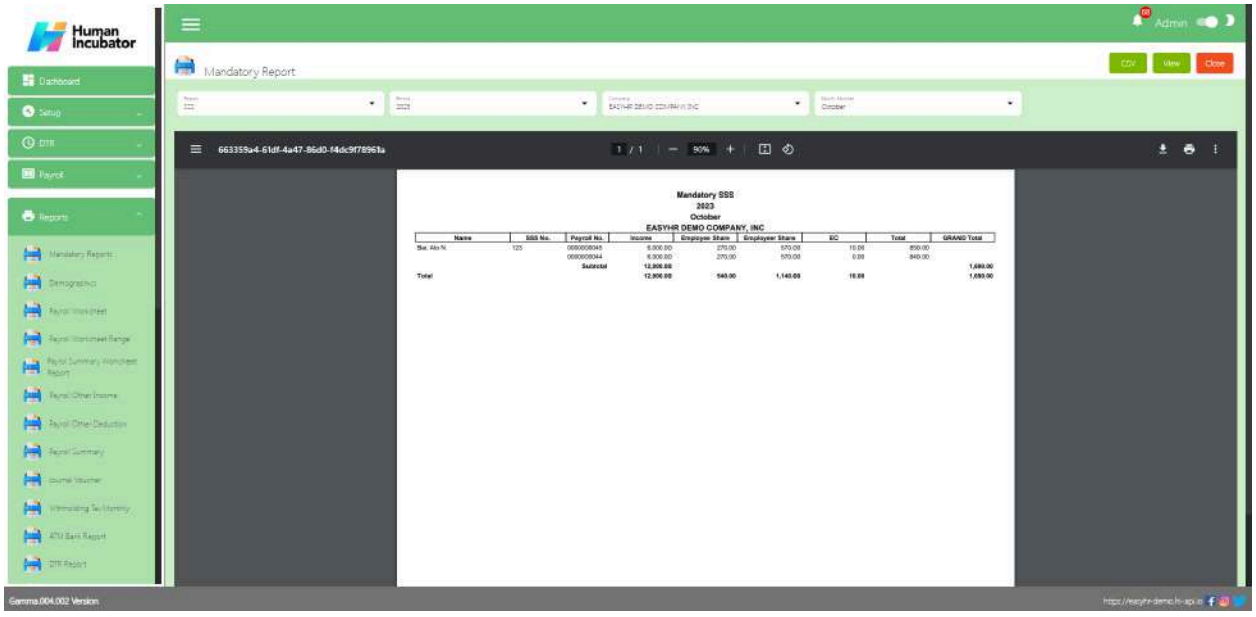
Mandatory Reports

Overview

- Mandatory Reports are used to view or generate all mandatory deductions just like SSS, HDMF and PHIC.

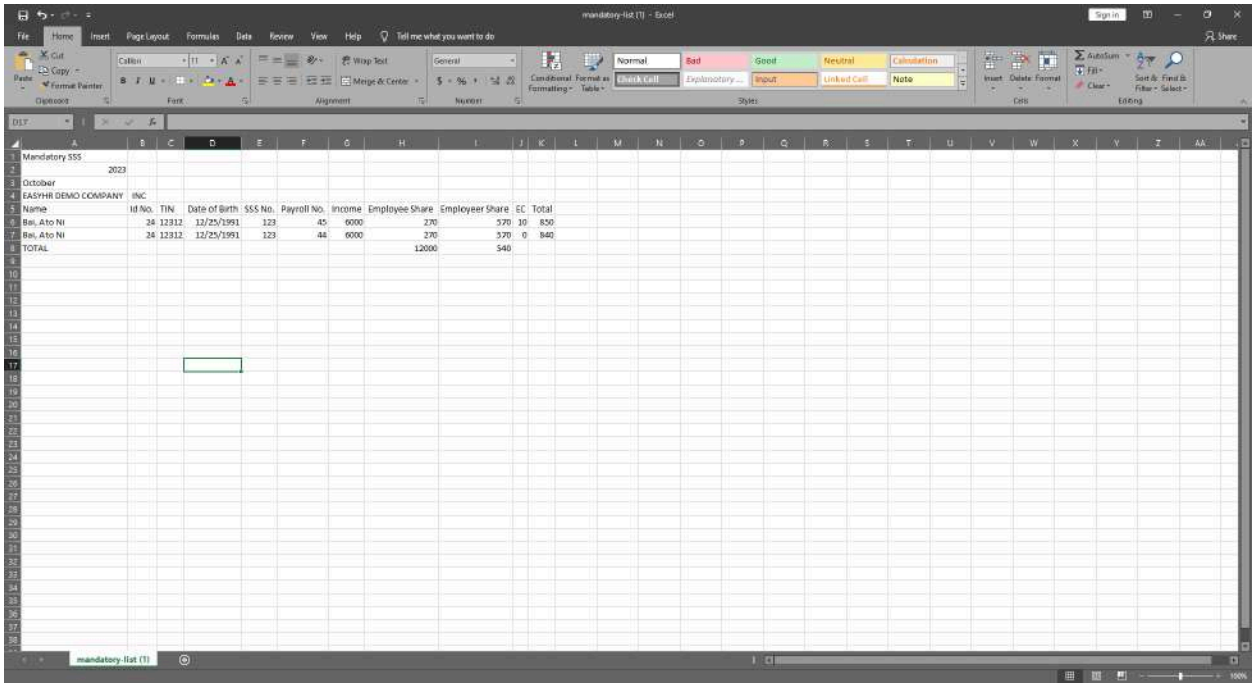
Mandatory Report

- Generate or view reports
    - Select Report (SSS, HDMF and PHIC)
    - Select Period (Year)
    - Select Company
    - Select Month number
    - Click the View button to generate a mandatory report.
    - The user can **Download** this report and also can **Print**



Download CSV

- Click the **CSV** button to download the CSV file



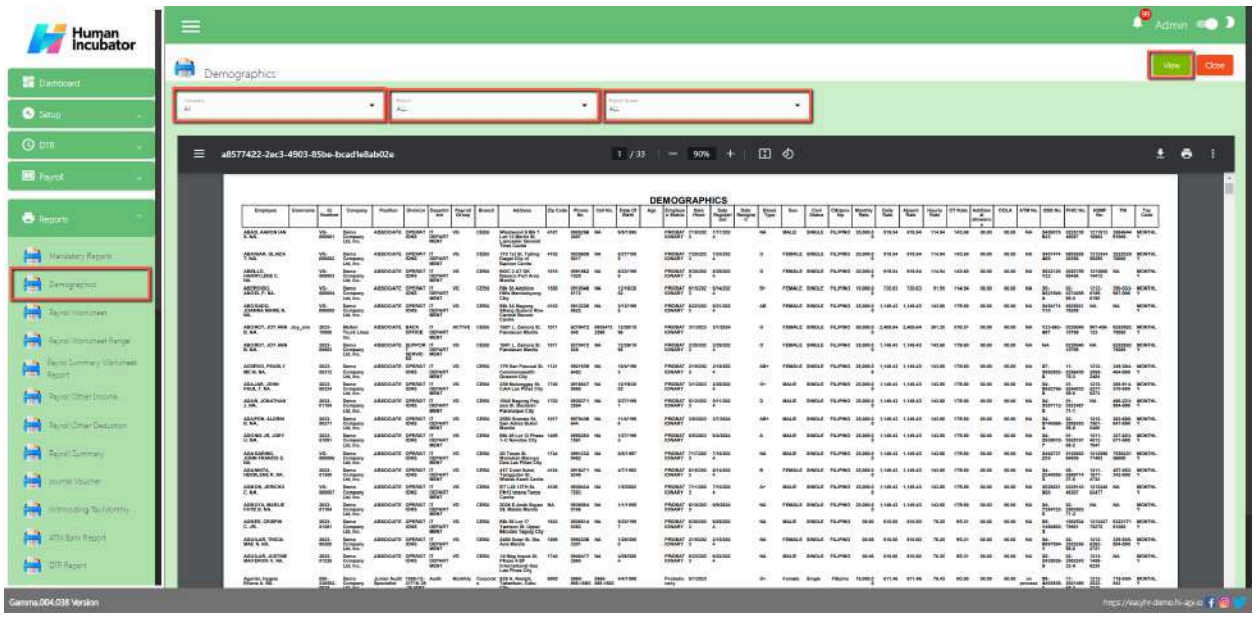
Demographics

Overview

- Demographics is used to provide information about the characteristics and statistics of a population. Demographics typically include details about age, gender, race, ethnicity, income, education, occupation, marital status, and other factors that help describe and understand a group of people.

Demographics

- Generate or view reports
    - Select Company (The user can select all companies)
    - Select Branch (The user can select all branches)
    - Select Payroll Group (The user can select all the payroll group)
    - Click the View button to generate a demographics report.



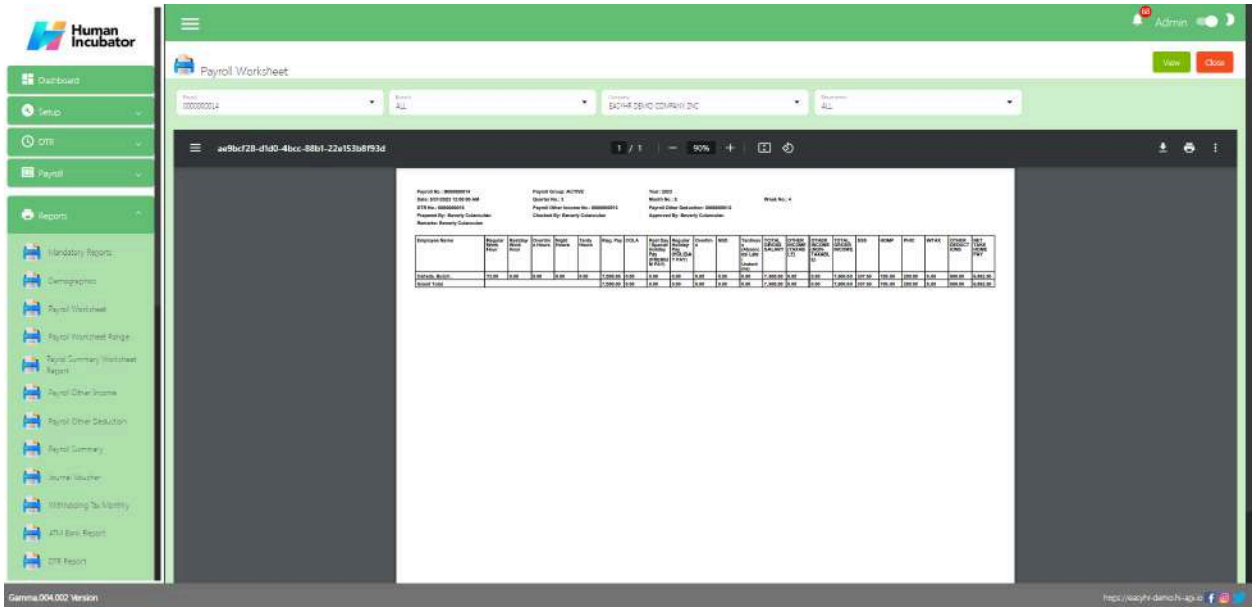
Payroll Worksheet

Overview

- Payroll Worksheet used to calculate and summarize the payroll for their employees. It's an essential tool for ensuring that employees are accurately compensated for their work, and it helps the employer comply with tax and labor laws.

Payroll Worksheet

- Generate or view reports
    - Select Payroll number
    - Select Branch (The user can select all Branches)
    - Select Company
    - Select Department (The user can select all Departments)
    - Click the View button to generate a Payroll worksheet report.



- The user can **Download** this report and also can **Print**.

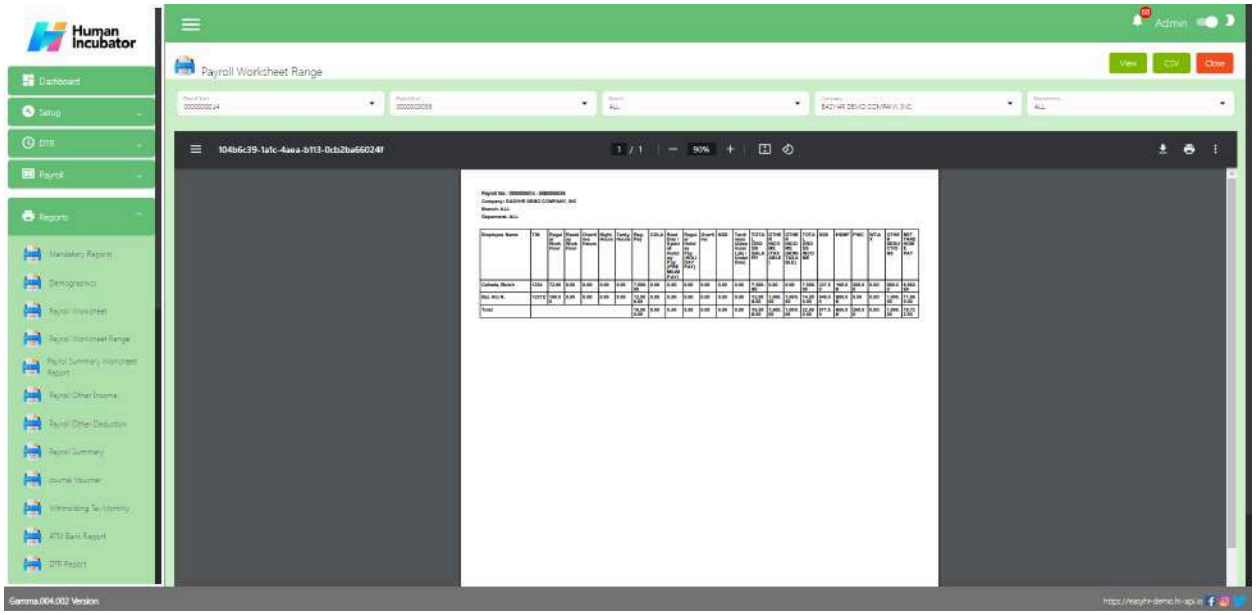
Payroll Worksheet Range

Overview

- Payroll Worksheet Range typically refers to the range of dates or time period covered by a specific payroll worksheet. This range is essential for accurately calculating and summarizing the payroll for a set period.

Payroll Worksheet Range

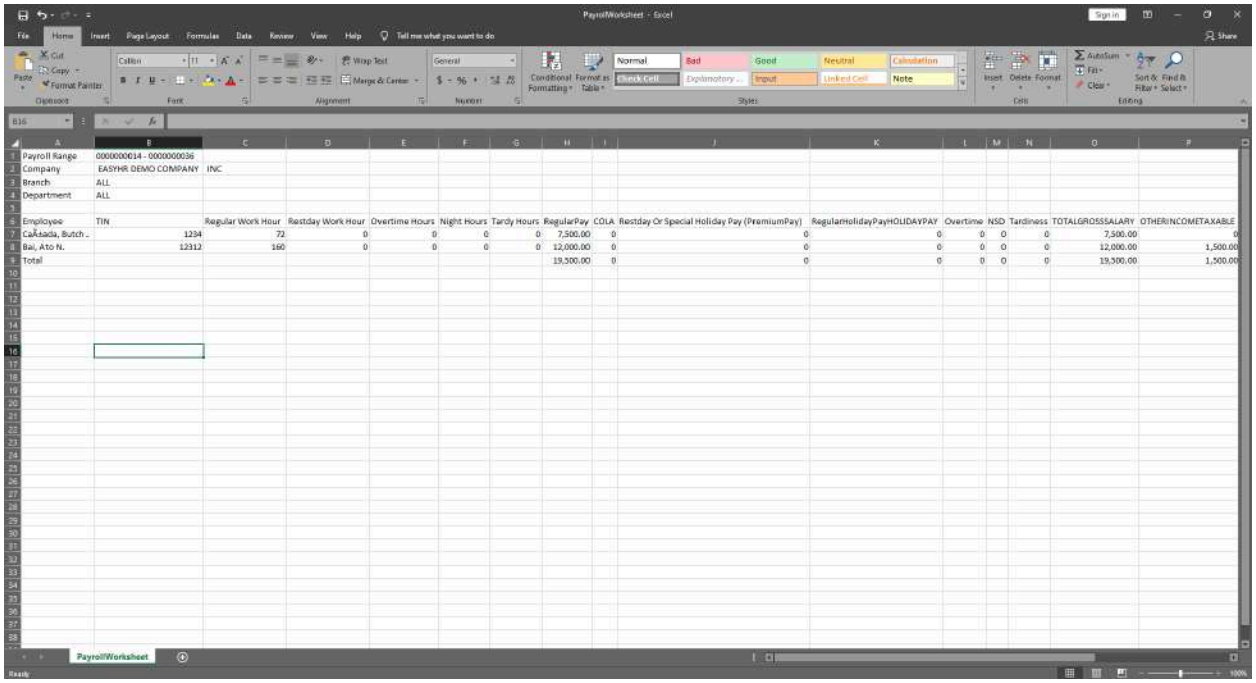
- Generate or view reports
    - Select Payroll Start
    - Select Payroll End
    - Select Branch (The user can select all Branches)
    - Select Company
    - Select Department (The user can select all Departments)
    - Click the View button to generate a Payroll worksheet range report.



- The user can **Download** this report and also can **Print**.

Download CSV

- Click the **CSV** button to download the CSV file



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Payroll Range	0000000014 - 0000000036														
2	Company	EASYHR DEMO COMPANY	INC													
3	Branch	ALL														
4	Department	ALL														
5																
6	Employee	TIN	Regular Work Hour	Restday Work Hour	Overtime Hours	Night Hours	Tardy Hours	RegularPay	COLA	Restday Or Special Holiday Pay (PremiumPay)	RegularHolidayPayHOLIDAYPAY	Overtime	NSD	Tardiness	TOTALGROSSSALARY	OTHERINCOMETAXABLE
7	Cañada, Butch .	1234	72	0	0	0	0	7,500.00	0	0	0	0	0	0	7,500.00	0
8	Bai, Ato N.	12312	160	0	0	0	0	12,000.00	0	0	0	0	0	0	12,000.00	1,500.00
9	Total							19,500.00	0	0	0	0	0	0	19,500.00	1,500.00

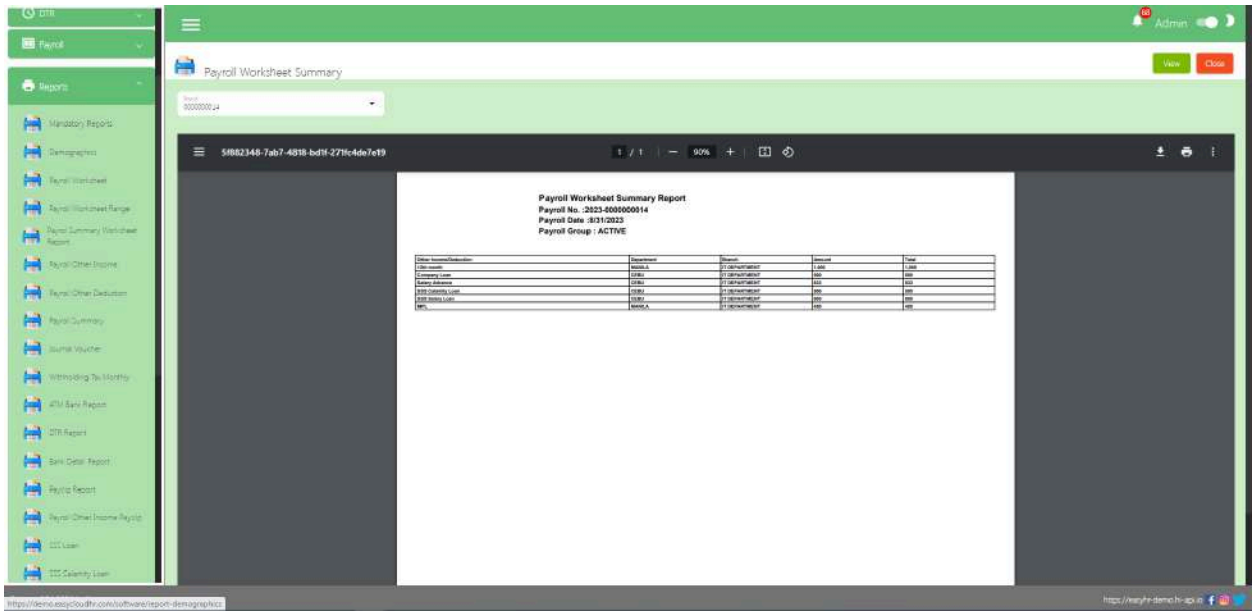
Payroll Summary Worksheet Report

Overview

- Payroll summary worksheet report that provides a concise overview of the key payroll information for a specific period, such as a pay period, month, or year. This report is typically used by businesses and organizations to summarize payroll data, track expenses, and ensure accurate financial reporting.

Payroll Summary Worksheet Report

- Generate or view reports
    - Select Payroll number
    - Click the View button to generate a Payroll summary worksheet report.



- The user can **Download** this report and also can **Print**.

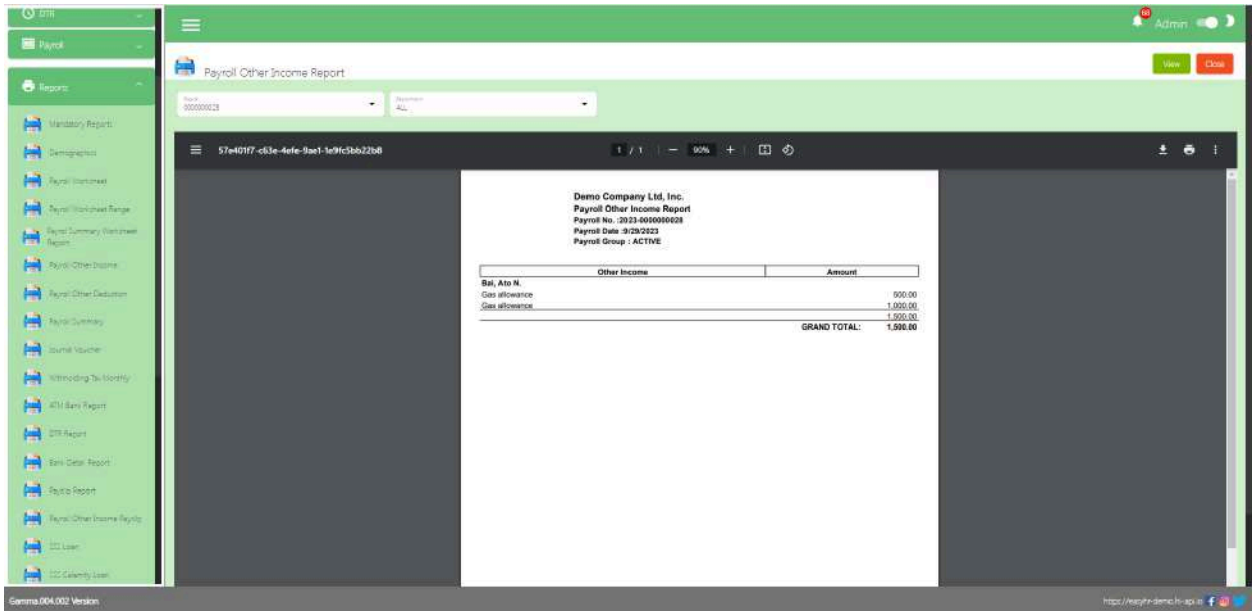
Payroll Other Income Report

Overview

- Payroll other income report that provides a summary of additional sources of income that employees receive in addition to their regular wages or salary. This report is used by businesses and organizations to track and account for various types of supplemental income that may affect an employee's overall compensation and tax liabilities.

Payroll Other Income Report

- Generate or view report
    - Select Payroll number
    - Select Department (The user can select all Departments)
    - Click the View button to generate a Payroll other income report.



- The user can **Download** this report and also can **Print**.

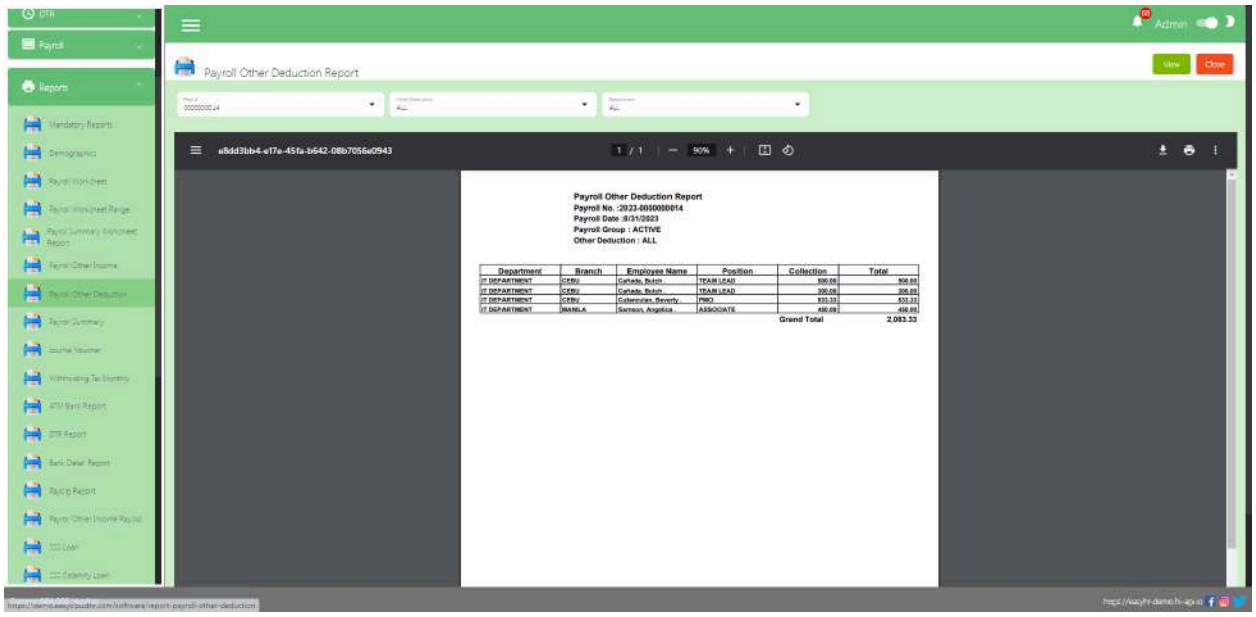
Payroll Other Deduction Report

Overview

- Payroll Other Deduction Report provides a summary of deductions from an employee's pay that are not related to taxes, Social Security, or Medicare. These deductions can include items like insurance premiums, retirement contributions, union dues, or any other voluntary or mandatory deductions specified by the employee or employer. The report helps businesses and organizations track and account for various types of deductions that impact an employee's net pay and financial obligations.

Payroll Other Deduction Report

- Generate or view report
    - Select Payroll number
    - Select Other Deduction name (The user can select all other deductions)
    - Select Department (The user can select all departments)
    - Click **View** button to generate Payroll Other Deduction Report.



- The user can **Download** this report and also can **Print**.

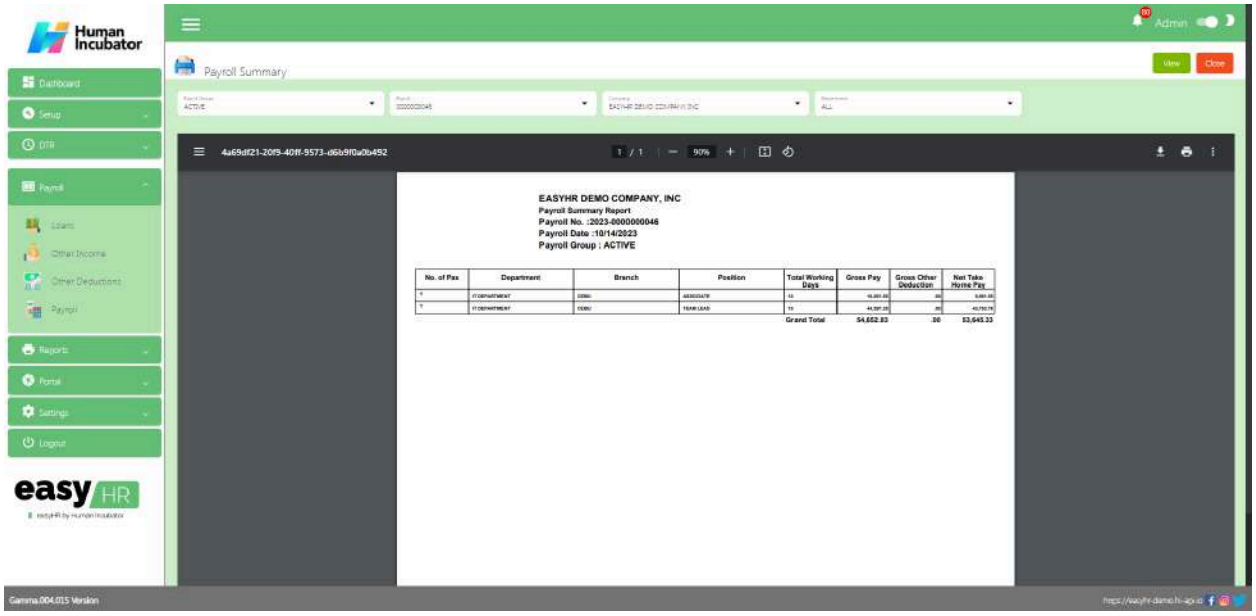
Payroll Summary

Overview

- Payroll Summary provides a concise summary of the financial aspects of a company's payroll process. It typically includes key information related to employee compensation, taxes, deductions, and other payroll-related expenses for a specific period, such as a month or a pay cycle. This overview is essential for both accounting and management purposes, helping businesses keep track of their labor costs and ensure compliance with relevant regulations.

Payroll Summary

- Generate or view report
    - Select Payroll Group
    - Select Payroll Code number
    - Select Company
    - Select Department (The User can select all departments)
    - Click the View button to generate a Payroll Summary report.



- The user can **Download** this report and also can **Print**.

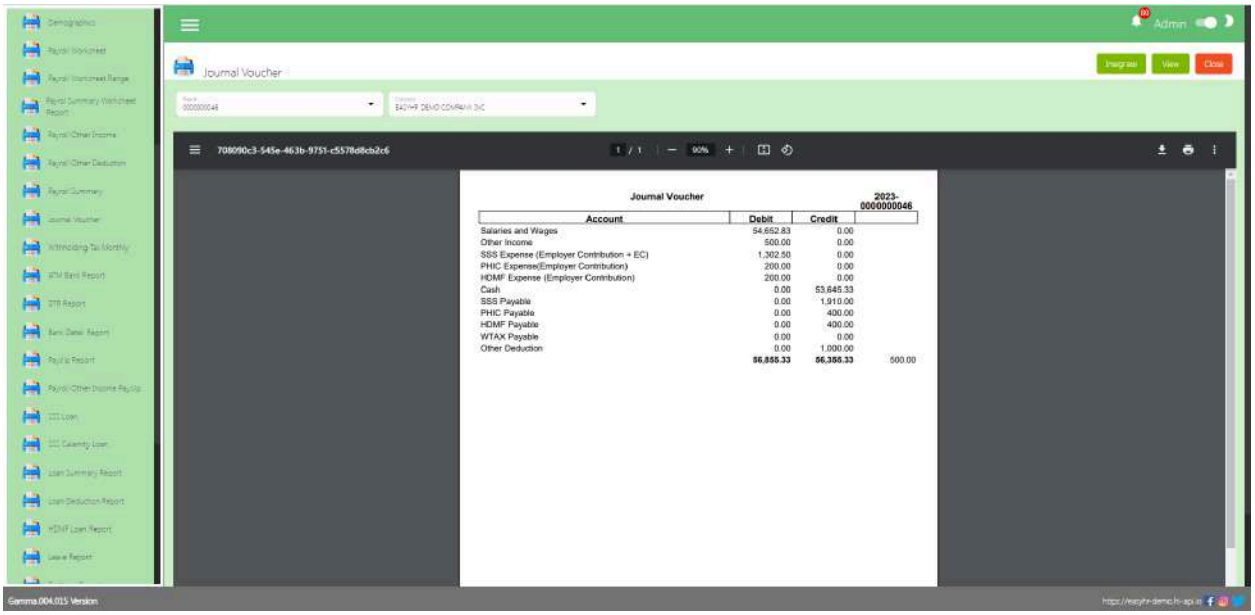
Journal Voucher

Overview

- Journal Voucher is used in accounting to record financial transactions. It serves as a temporary or preliminary entry, which is later adjusted or corrected before it is posted to the general ledger. Journal vouchers are commonly used when a transaction doesn't fit neatly into the standard accounting entries or when there is a need for additional information or approval before finalizing the transaction.

Journal Voucher

- Generate or view report
    - Select Payroll Code number
    - Select Company
    - Click the View button to generate a journal voucher report.



- The user can **Download** this report and also can **Print**.
- The user can Integrate to **EasyFS** system

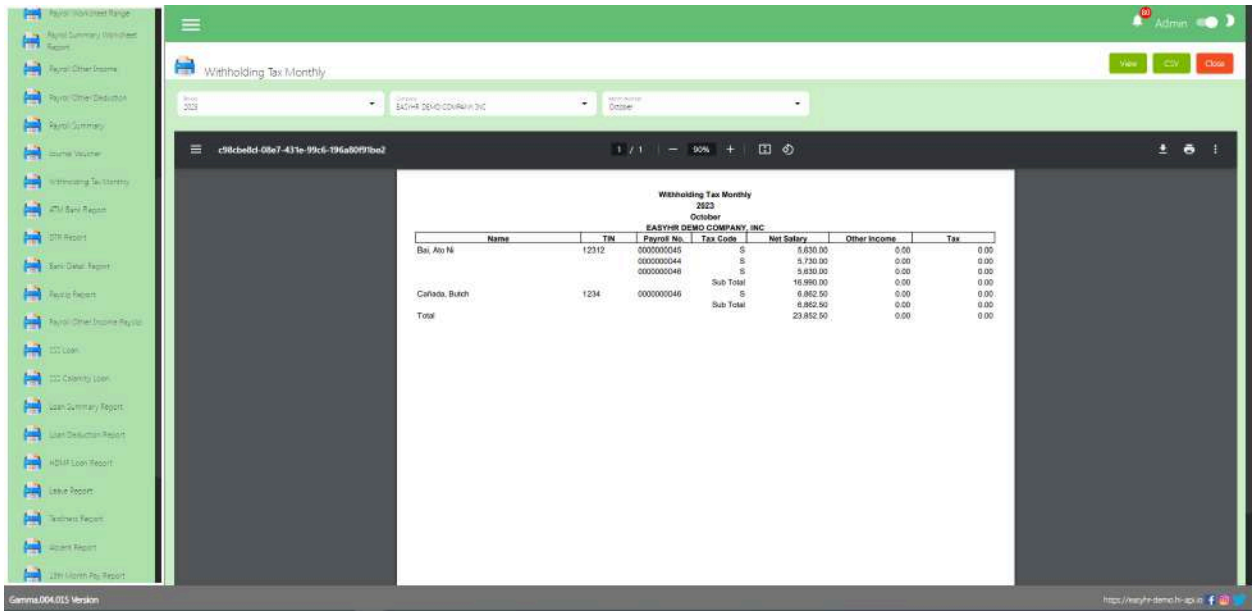
Withholding Tax Monthly

Overview

- Withholding Tax is a tax collected by a payer (typically an employer) from the payment made to a payee (usually an employee or a vendor) and remitted to the government on behalf of the payee. It's a mechanism used to ensure that individuals and businesses pay their income taxes or other applicable taxes throughout the year.

Withholding Tax Monthly

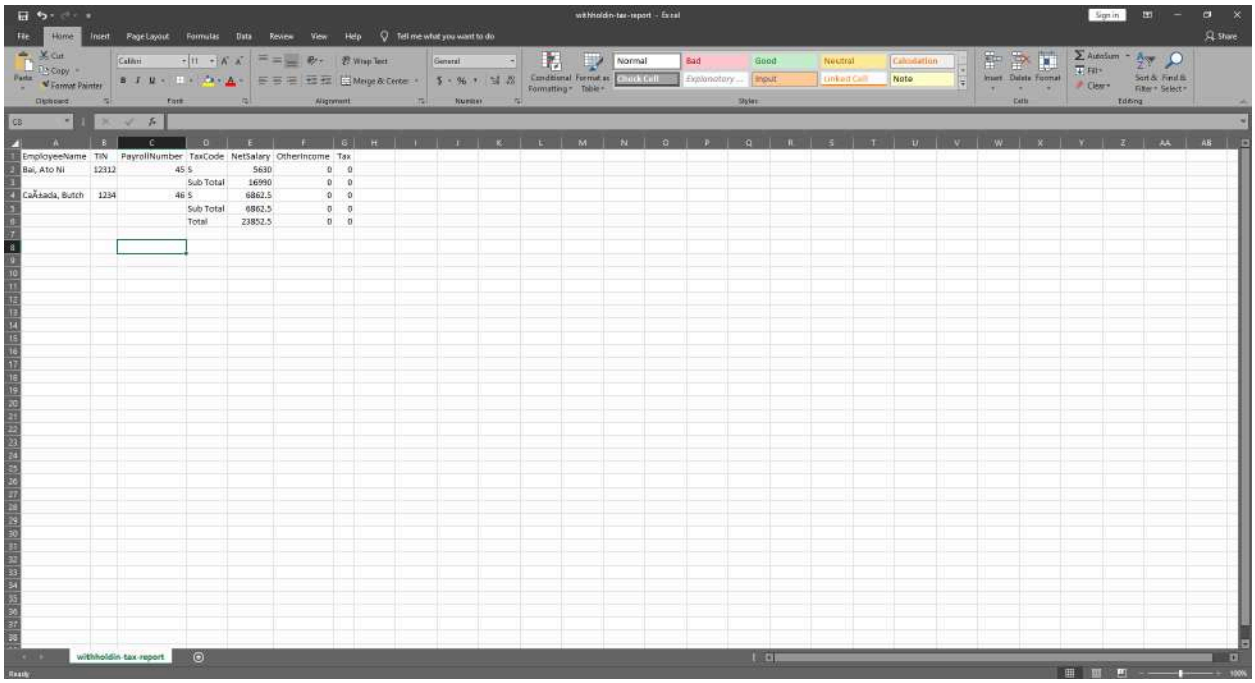
- Generate or view report
    - Select Year
    - Select Company
    - Select Month



- The user can **Download** this report and also can **Print**.

Download CSV

- Click the **CSV** button to download the CSV file.



EmployeeName	TIN	PayrollNumber	TaxCode	NetSalary	OtherIncome	Tax
Bai, Ato Ni	12312	45	S	5630	0	0
			Sub Total	16990	0	0
CaÃ±ada, Butch	1234	46	S	6862.5	0	0
			Sub Total	6862.5	0	0
			Total	23852.5	0	0

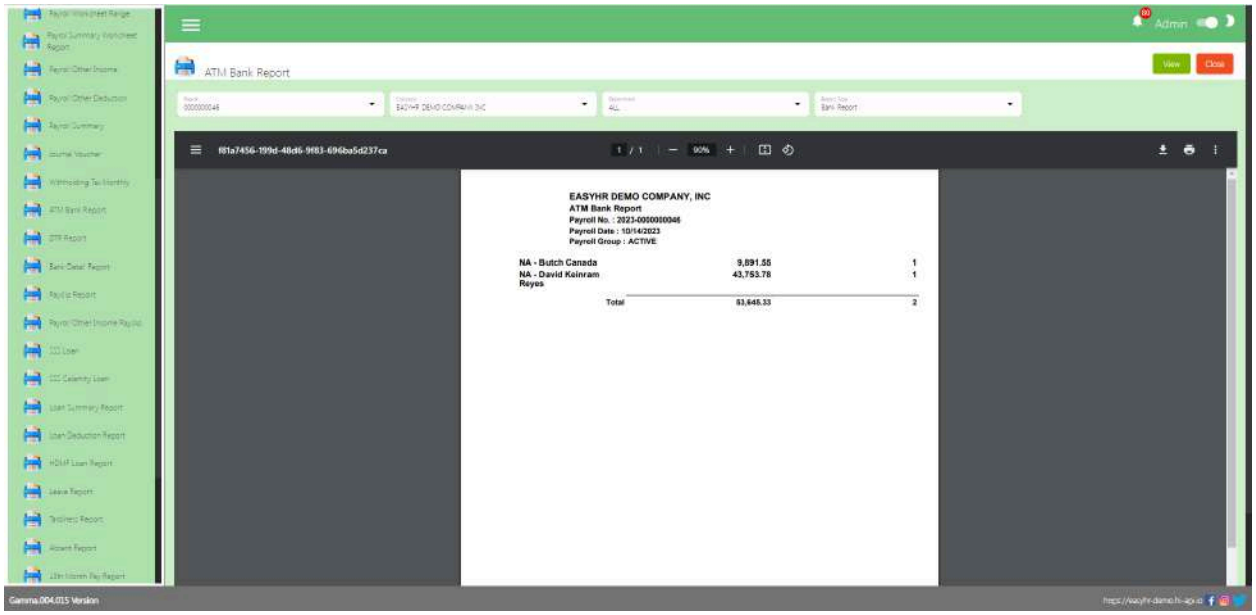
ATM Bank Report

Overview

- ATM Bank report is a summary of the transactions and activities associated with a bank's network of ATMs over a specific period, such as a day, week, month, or year. These reports are generated to monitor the performance, usage, and financial aspects of ATM operations.

ATM Bank Report

- Generate or view report
    - Select Payroll Code number
    - Select Company name
    - Select Department (The User can select all departments)
    - Select Bank
    - Click the View button to generate a journal voucher report.



- The user can **Download** this report and also can **Print**.

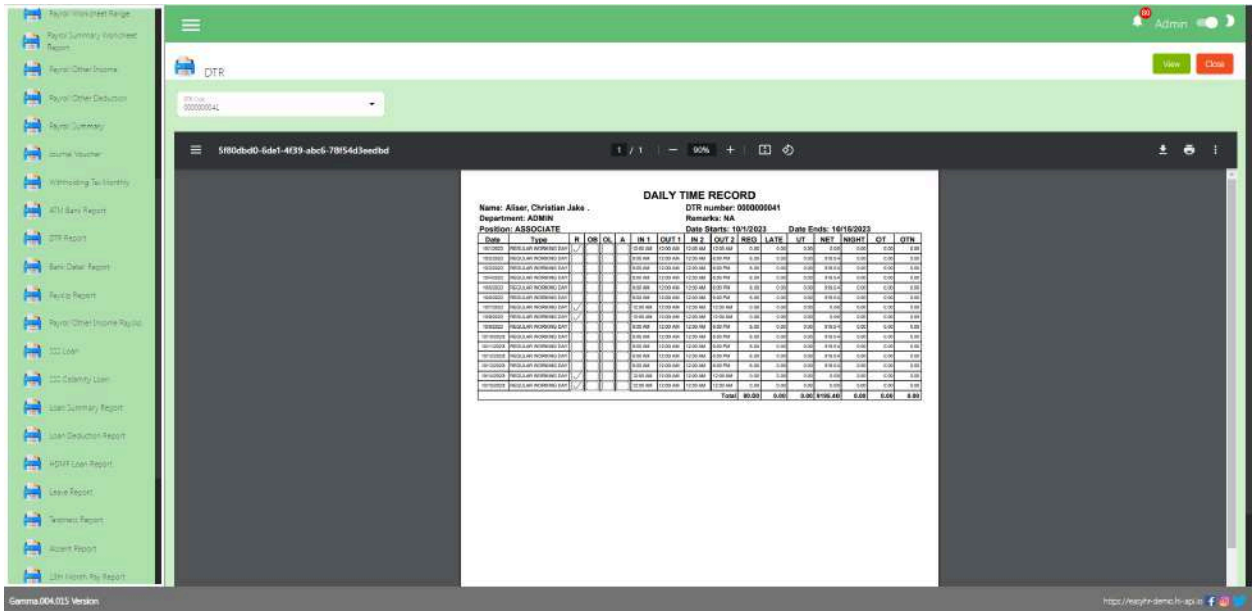
DTR Report

Overview

- DTR report used by organizations and employers to track and record the attendance and working hours of their employees on a daily basis. This report is essential for various purposes, including calculating payroll, monitoring employee punctuality, and ensuring compliance with labor regulations.

DTR Report

- Generate or view report
    - Select DTR code number
    - Click the View button to generate a DTR report.



- The user can **Download** this report and also can **Print**.

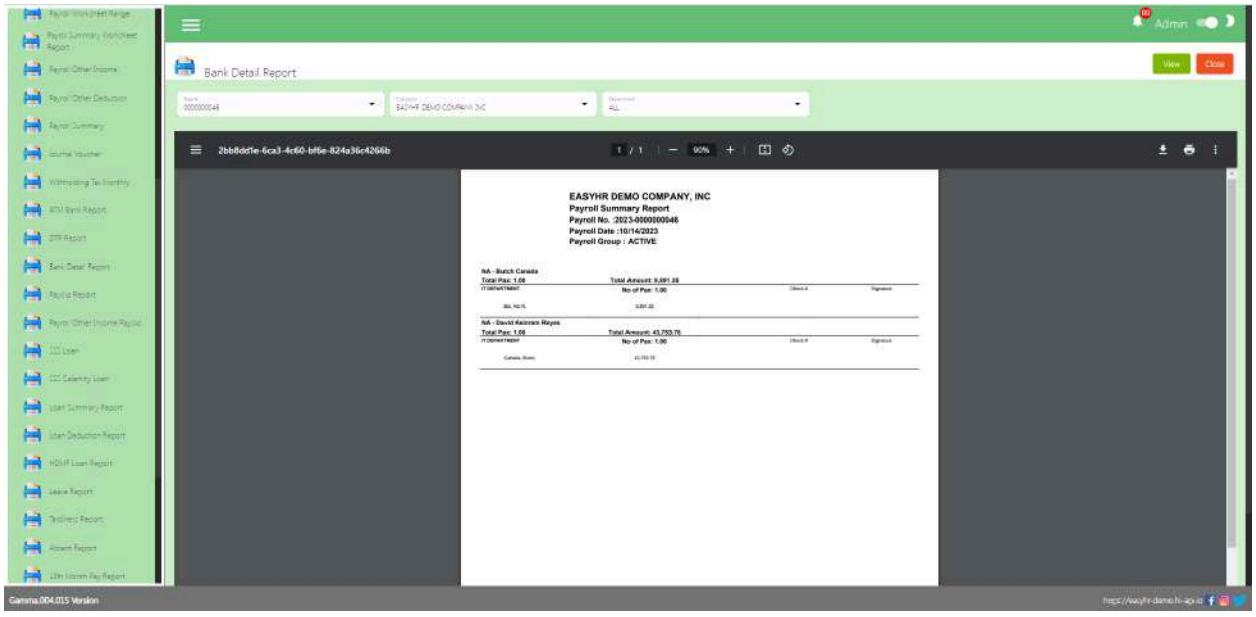
Bank Detail Report

Overview

- Bank Detail Report provides a comprehensive overview of a company's or individual's financial transactions and account activity with a specific bank or financial institution. This report is used for various purposes, including financial analysis, reconciliation, and compliance.

Bank Detail Report

- Generate or view report
    - Select Payroll Code number
    - Select Company
    - Select Department (The user can select all departments)
    - Click the View button to generate a bank detail report.



- The user can **Download** this report and also can **Print**.

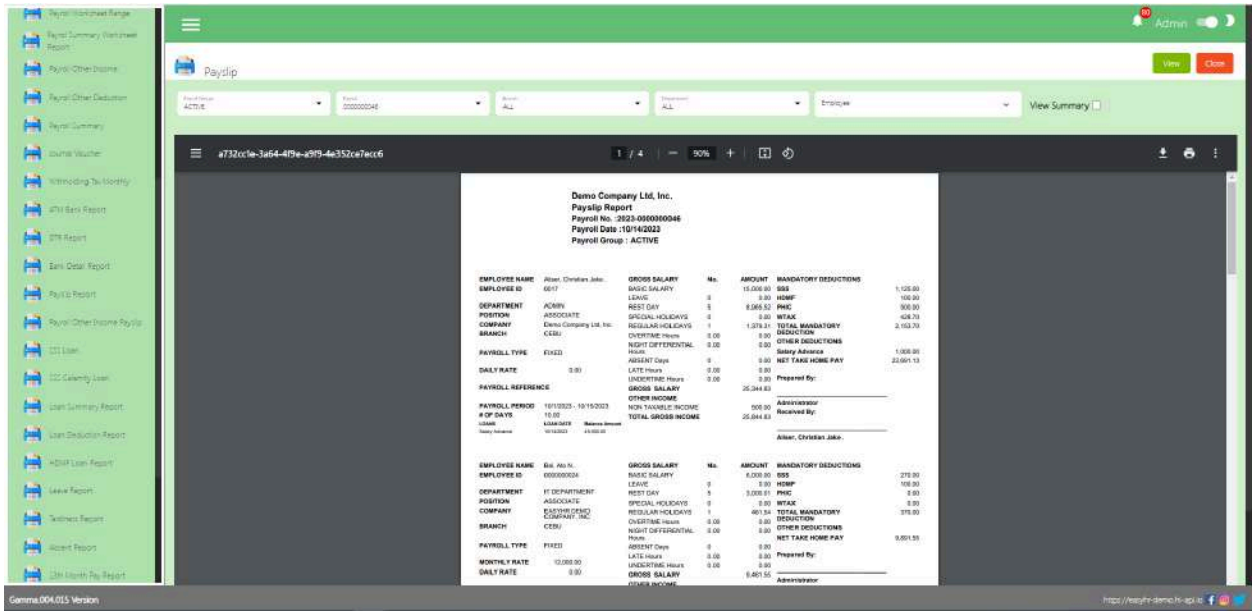
Payslip Report

Overview

- Payslip Report is a document that provides a detailed summary of an employee's earnings, deductions, and net pay for a specific pay period. It is typically issued by an employer to an employee along with their salary or wage payment. The payslip serves as a record of an employee's compensation and is important for both financial management and legal compliance.

Payslip Report

- Generate or view report
    - Select Payroll Group
    - Select Payroll code number
    - Select Branch (The user can select all branches)
    - Select Department
    - Select All employees (The user can select one employee)
    - Click the **View** button to generate a Payslip report.



- The user can **Download** this report and also can **Print**.

Payroll Other Income Payslip

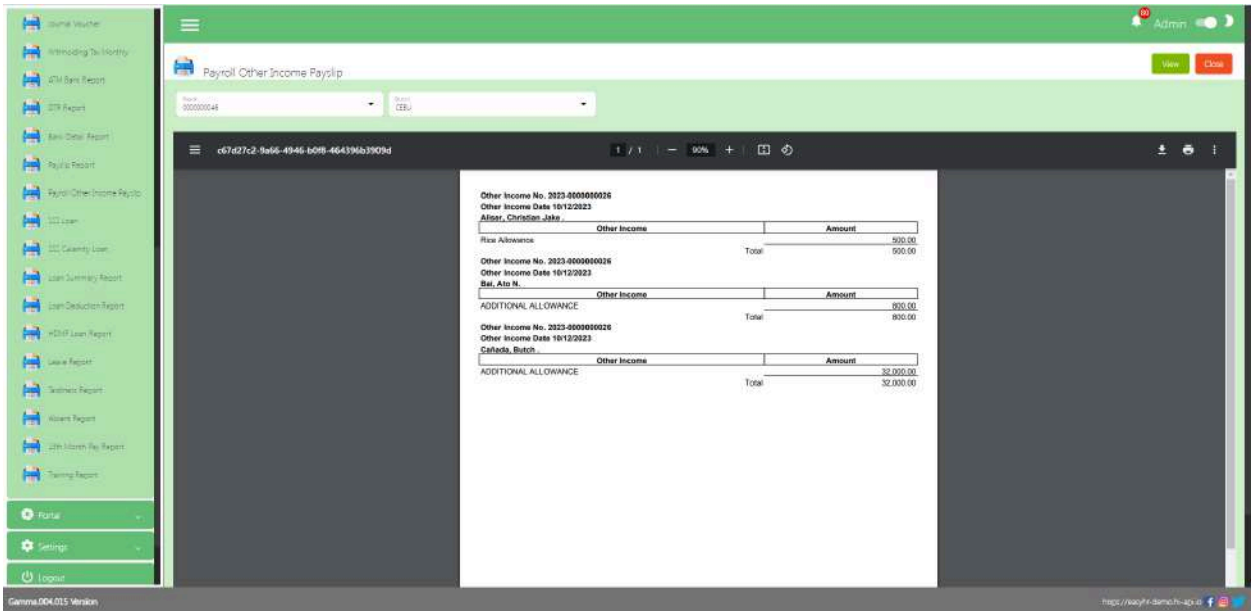
Overview

- Payroll Other Income Payslip is a document that provides a summary of an employee's earnings, specifically focusing on additional or supplementary income beyond their regular salary or wages. This report details various types of "other income" or compensation that an employee might receive. It is an important component of the overall payslip, helping employees understand their complete compensation package.

Payroll Other Income Payslip

- Generate or view report
    - Select Payroll code number
    - Select Branch

- Click the **View** button to generate a payroll other income payslip report



- The user can **Download** this report and also can **Print**.

SSS Loan

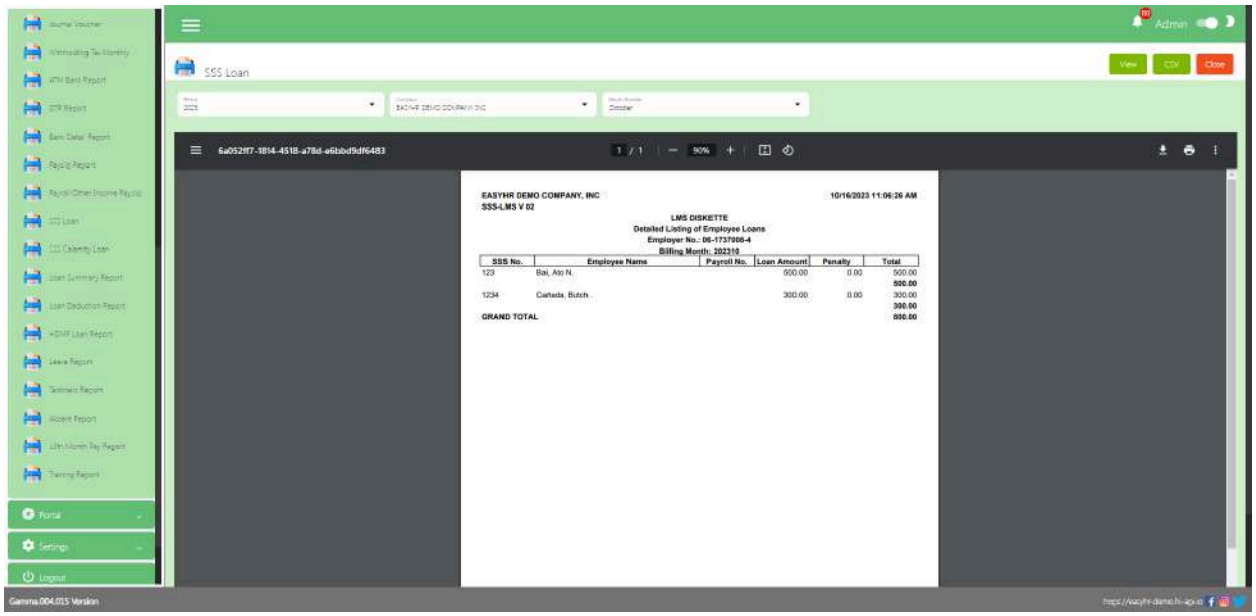
Overview

- SSS Loan Report is a document that provides a summary of loans obtained by an individual from the Social Security System (SSS) in the Philippines. The SSS is a government agency that provides social security benefits, including loans, to qualified members. The loan report helps individuals and borrowers keep track of their loan

transactions, including details such as the loan type, amount, payments, balances, and the status of the loan.

SSS Loan

- Generate or view report
    - Select Year
    - Select Company
    - Select Month
    - Click the **View** button to generate an SSS loan report.



- The user can **Download** this report and also can **Print**.

Download CSV

- Click the **CSV** button to download the CSV file.

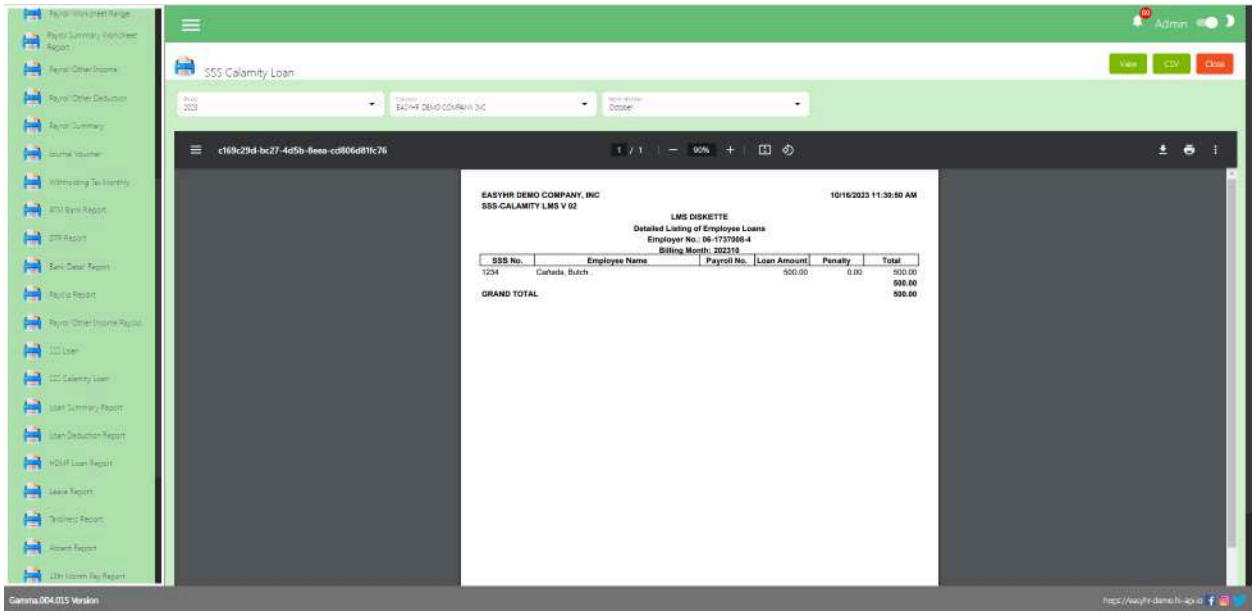
SSS Calamity Loan

Overview

- SSS Calamity Loan Report is a document that provides a summary of loans obtained by individuals from the SSS in the Philippines in response to a declared calamity or disaster. The SSS offers this type of loan to help its members cope with financial difficulties resulting from natural disasters or emergencies. The Calamity Loan Report helps borrowers keep track of their loan transactions, including details such as the loan amount, payments, balances, and the status of the loan, specifically related to calamity loans.

SSS Calamity Loan

- Generate or view report
    - Select Year
    - Select Company
    - Select Month
    - Click the **View** button to generate an SSS calamity loan report.



- The user can **Download** this report and also can **Print**.

Download CSV

- Click the **CSV** button to download the CSV file.

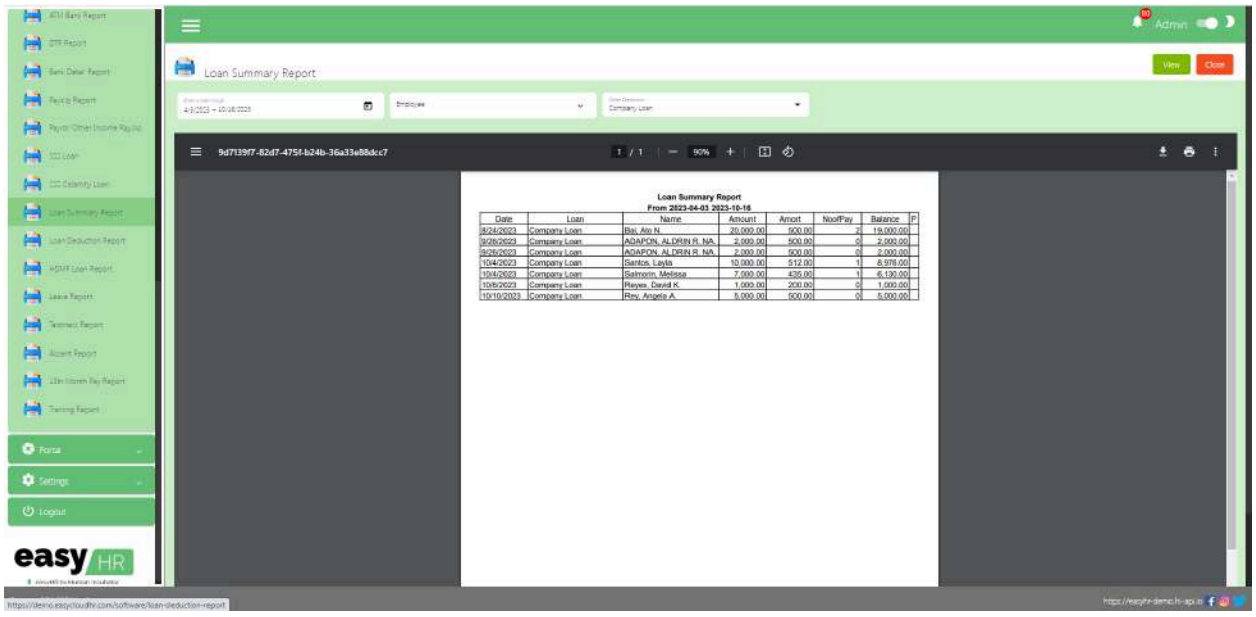
Loan Summary Report

Overview

- Loan Summary Report is a document that provides a concise and comprehensive overview of a borrower's loan details, typically used by financial institutions, lending agencies, or individuals to keep track of loan-related information. It offers an at-a-glance view of the essential aspects of a loan, making it easier to monitor and manage the loan effectively.

Loan Summary Report

- Generate or view report
    - Enter a date range
    - Select All employees (The user can select one employee)
    - Select Other Deduction
    - Click the **View** button to generate a loan summary report.



- The user can **Download** this report and also can **Print**.

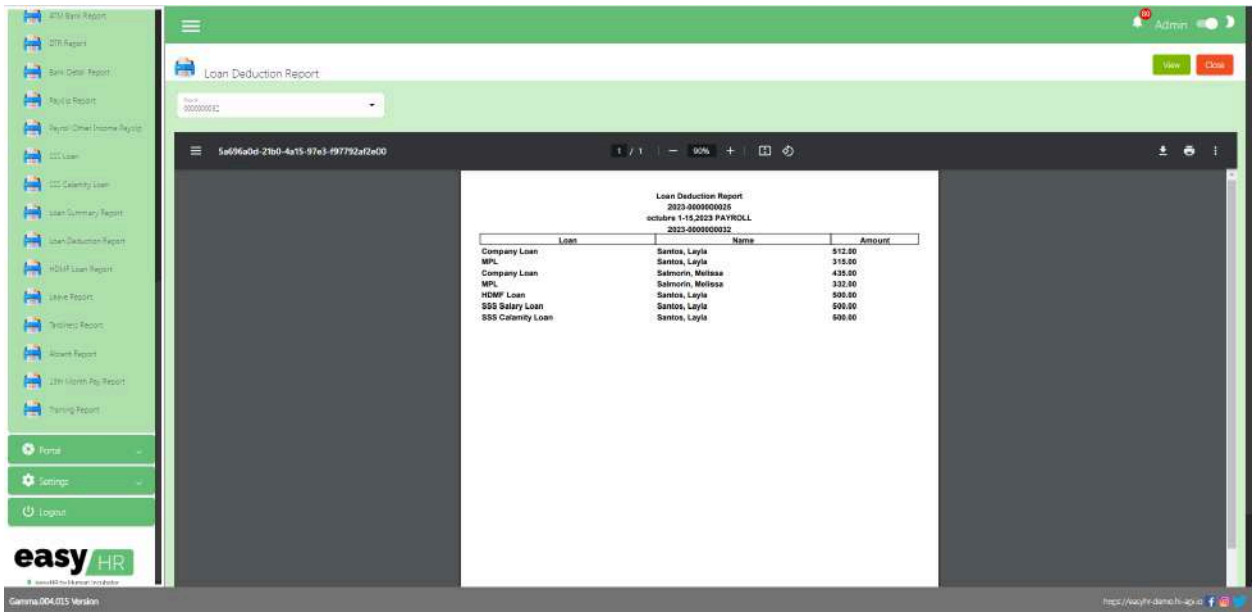
Loan Deduction Report

Overview

- Loan Deduction Report is a document that provides a detailed summary of loan deductions made from an individual's or employee's salary or income to repay a loan. This report is often generated by employers or financial institutions to document the loan deduction process and help individuals keep track of their loan repayment progress.

Loan Deduction Report

- Generate or view Report
    - Select Payroll code number
    - Click the **View** button to generate loan deduction report



- The user can **Download** this report and also can **Print**.

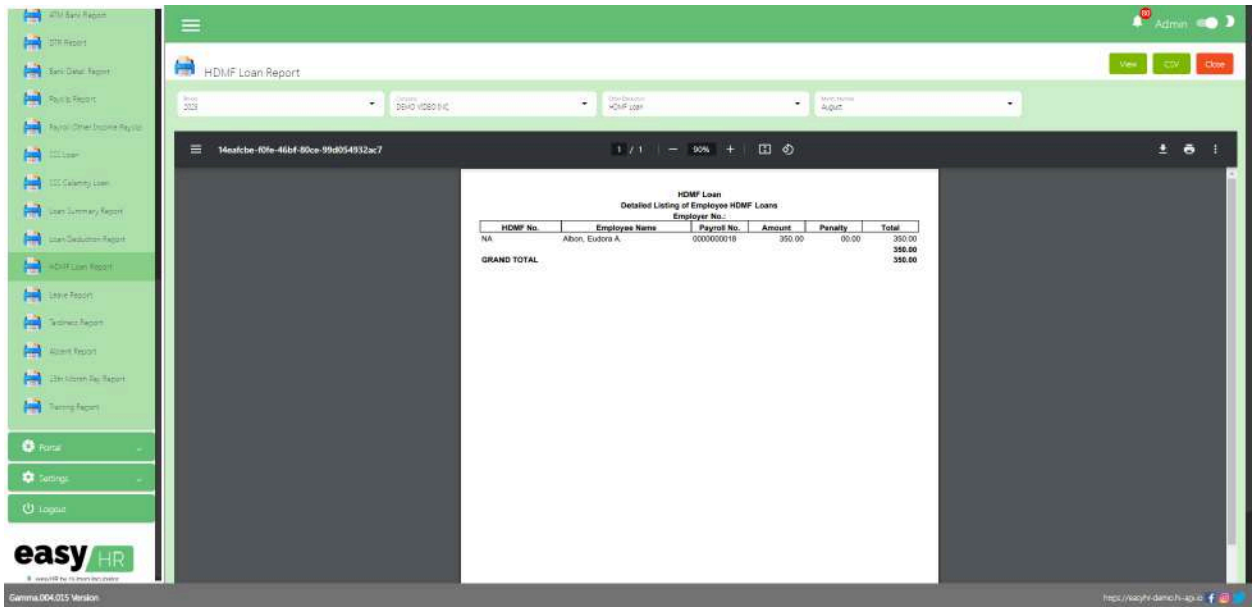
HDMF Loan Report

Overview

- HDMF Loan Report is a document that provides a summary of loans obtained by individuals from the HDMF in the Philippines. The HDMF, also known as Pag-IBIG Fund, offers various loan programs to help its members acquire homes, finance home improvements, or address their housing needs. The HDMF Loan Report is important for borrowers to keep track of their loan transactions, including details such as the loan type, amount, payments, balances, and the status of the loan.

HDMF Loan Report

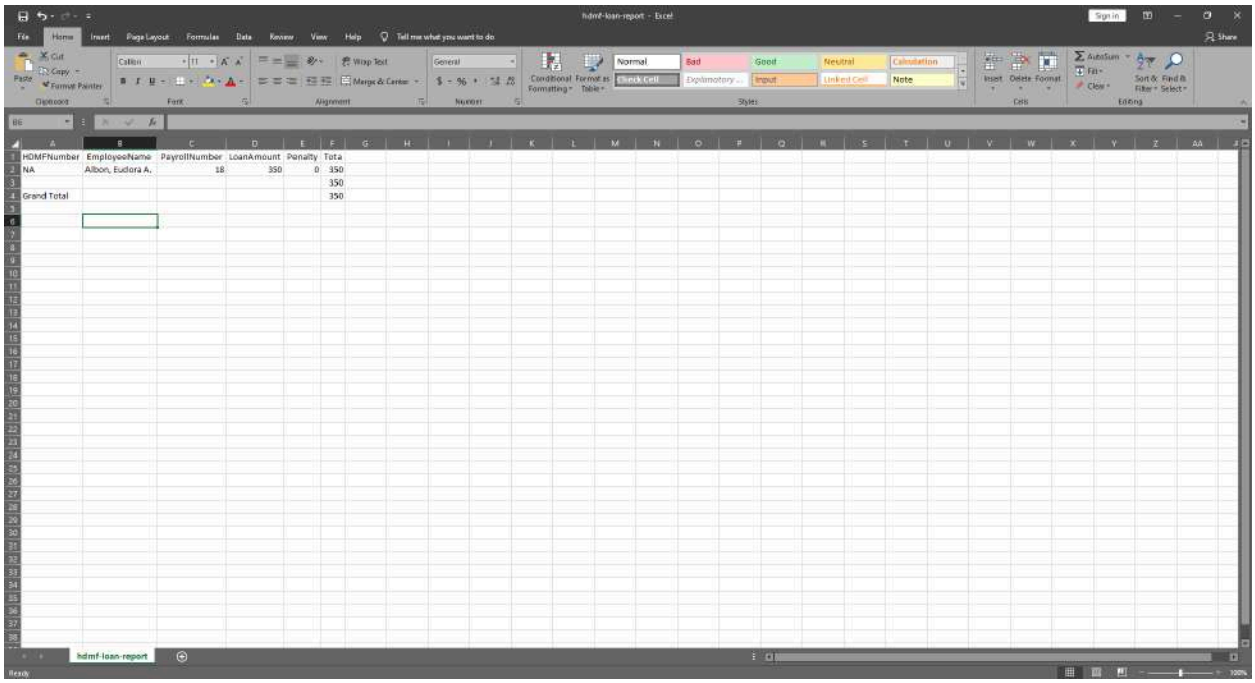
- Generate or view report
    - Select Year
    - Select Company
    - Select HDMF Loan
    - Select Month
    - Click the **View** button to generate a HDMF loan report.



- The user can **Download** this report and also can **Print**.

Download CSV

- Click the **CSV** button to download the CSV file.



HDMFNumber	EmployeeName	PayrollNumber	LoanAmount	Penalty	Tota
NA	Albon, Eudora A.	18	350	0	350
					350
Grand Total					350

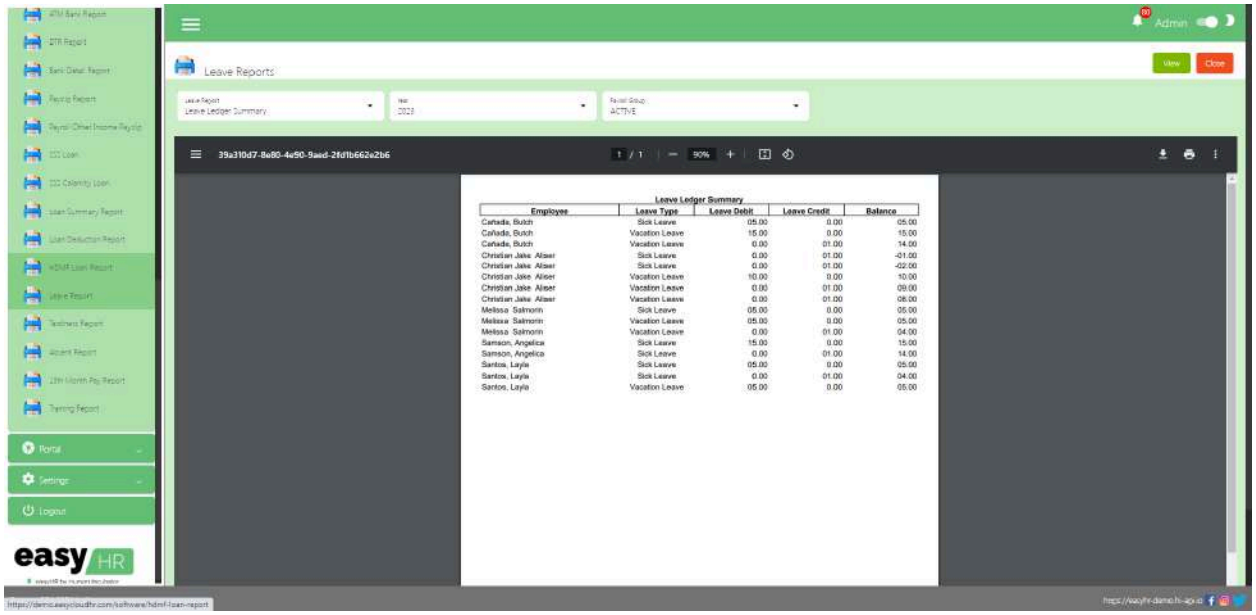
Leave Reports

Overview

- Leave reports used in human resources and payroll management to record and track employee leaves, which can include vacation time, sick leave, personal days, and other types of paid or unpaid time off. These reports help organizations and HR departments monitor employee leave balances, ensure compliance with labor laws and company policies, and maintain accurate payroll records.

Leave Reports

- Generate or view report
    - Select Leave Report
    - Select Year
    - Select Payroll Group
    - Click the **View** button to generate a loan report.



- The user can **Download** this report and also can **Print**.

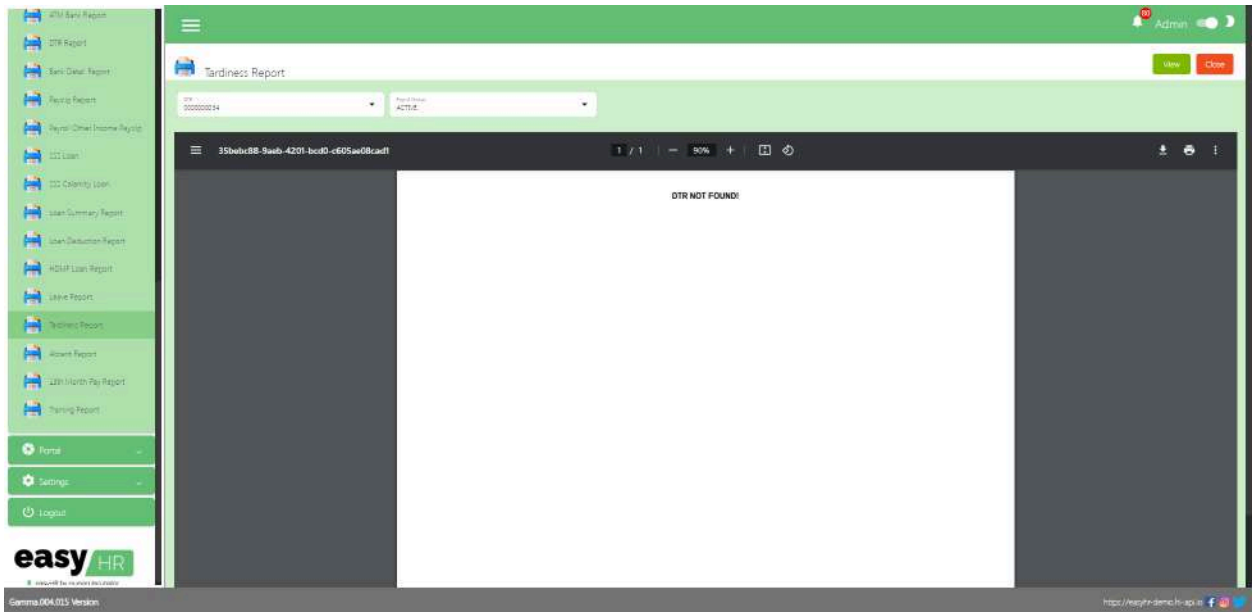
Tardiness Report

Overview

- Tardiness report is used in human resources and workplace management to monitor and track instances of employee tardiness. Tardiness refers to employees arriving late for work, meetings, or other scheduled activities. These reports help organizations and HR departments identify patterns of tardiness, address attendance issues, and implement appropriate measures to improve punctuality.

Tardiness Report

- Generate or view report
    - Select DTR code number
    - Select Payroll Group
    - Click the **Vlew** button to generate a tardiness report.



- The user can **Download** this report and also can **Print**.

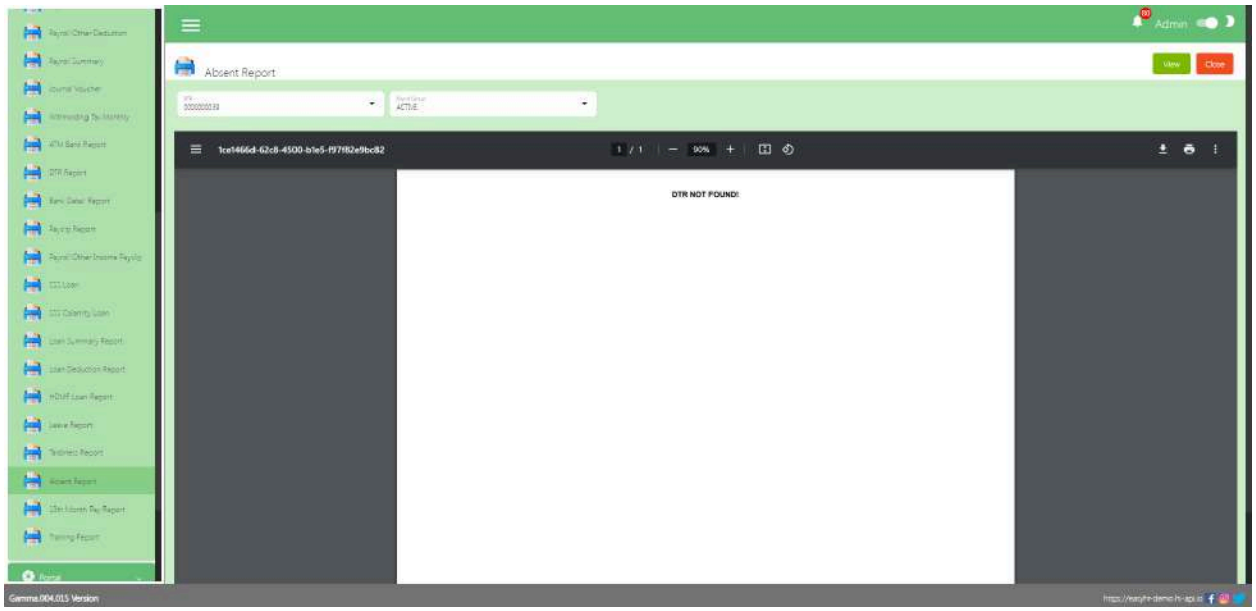
Absent Report

Overview

- Absent Report is a document used in human resources and workplace management to monitor and track instances of employee absences. These reports help organizations and HR departments identify patterns of absenteeism, ensure compliance with leave policies, and implement appropriate measures to manage attendance effectively.

Absent Report

- Generate or view report
    - Select DTR code number
    - Select Payroll Group
    - Click the **View** button to generate an Absent report.



- The user can **Download** this report and also can **Print**.

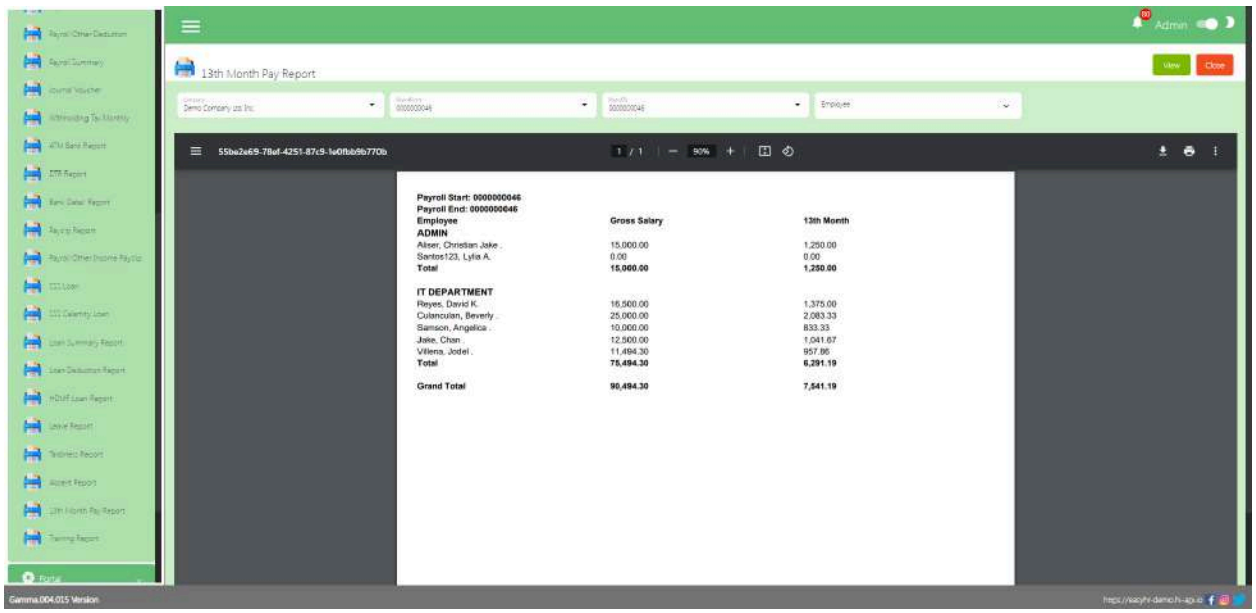
13th Month Pay Report

Overview

- 13th Month Pay Report is a document used in many countries, especially in the Philippines, to provide an overview of the 13th month pay or year-end bonus granted to employees. The 13th month pay is a mandatory benefit or bonus that is typically equivalent to one-twelfth (1/12) of an employee's annual basic salary. This report is essential for both employers and employees to document and understand the distribution of this bonus.

13th Month Pay Report

- Generate or view report
    - Select Company
    - Select Payroll Code number from
    - Select Payroll Code number to
    - Select All employees (The user can select one employee)
    - Click the **View** button to generate a 13th month pay report.



- The user can **Download** this report and also can **Print**.

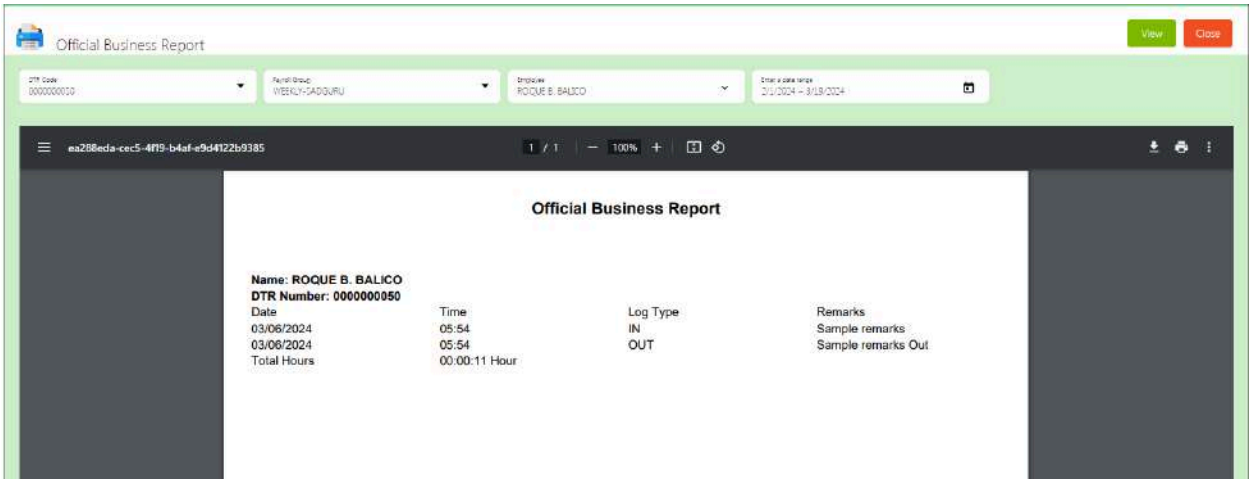
Official Business Report

Overview

- Official Business Report is a document report generated by easyHR to provide comprehensive information on various aspects related to workforce operations. to record and document their authorized absence from work for official business purposes. This report typically includes details about the purpose of the leave, the dates of absence, and any relevant information regarding the business-related activities that were conducted during the leave period.

Official Business Report

- Generate or View Report
    - Select DTR Code
    - Select Payroll Group
    - Select Employee
    - Enter the Date Range
    - Click **View** Button to generate the report



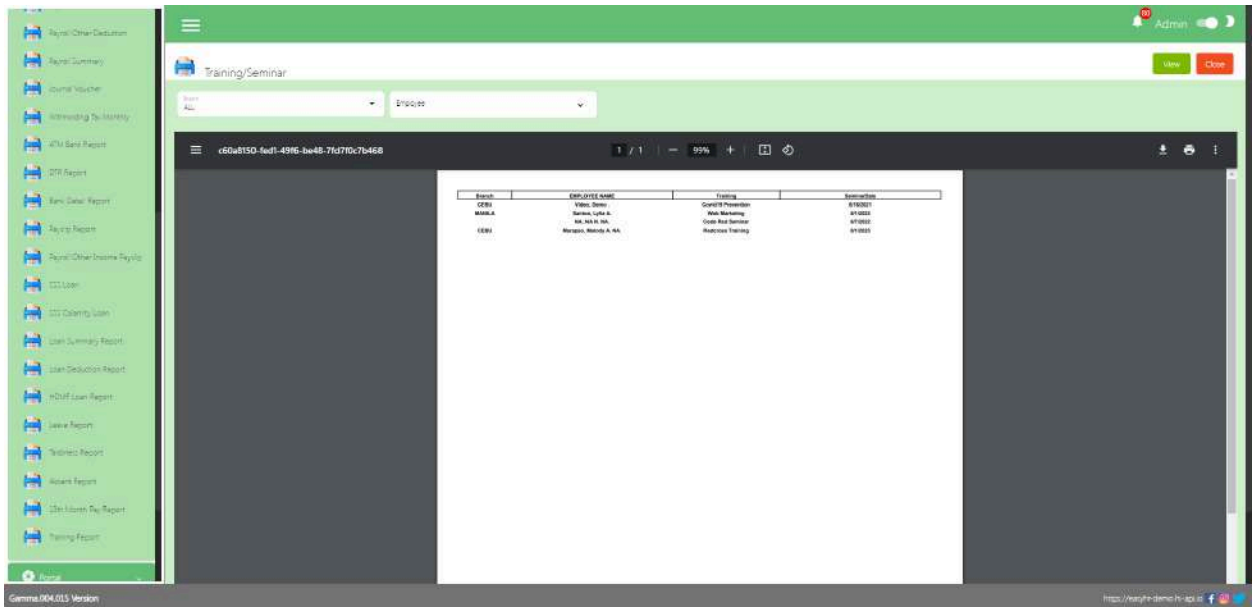
Training/Seminar

Overview

- Training/Seminar is a document that provides a comprehensive overview of a training session, workshop, seminar, or similar educational event. These reports serve as a valuable tool for documenting the details of the training, seminar, or workshop, assessing its effectiveness, and providing information for future reference and decision-making.

Training/Seminar

- Generate or view report
    - Select Branch
    - Select All employees (The user can select one employee)
    - Click the **View** button to generate a training/seminar report.



- The user can **Download** this report and also can **Print**.

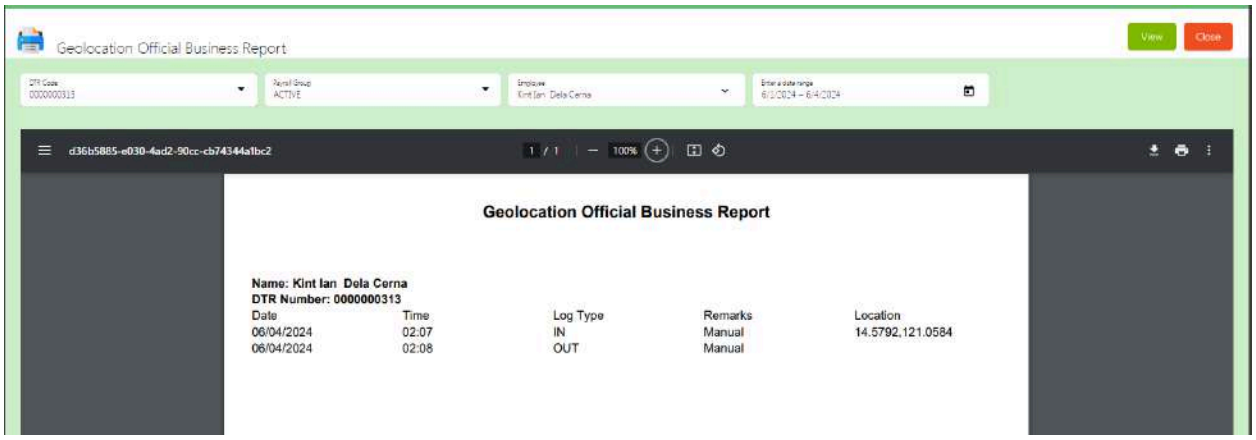
Geolocation Official Business Report

Overview

Geolocation Official Business Report is a document report generated by easyHR to provide comprehensive information on various aspects related to workforce operations. to record and document their authorized absence from work for official business purposes. This report typically includes details about the purpose of the leave, the dates of absence and its exact coordinates on the map, and any relevant information regarding the business-related activities that were conducted during the leave period.

Geolocation Official Business Report

- Generate or view report
    - Select DTR Code
    - Select Payroll Group
    - Select Employee
    - Enter Date Range



- The user can **Download** this report and also can **Print**.

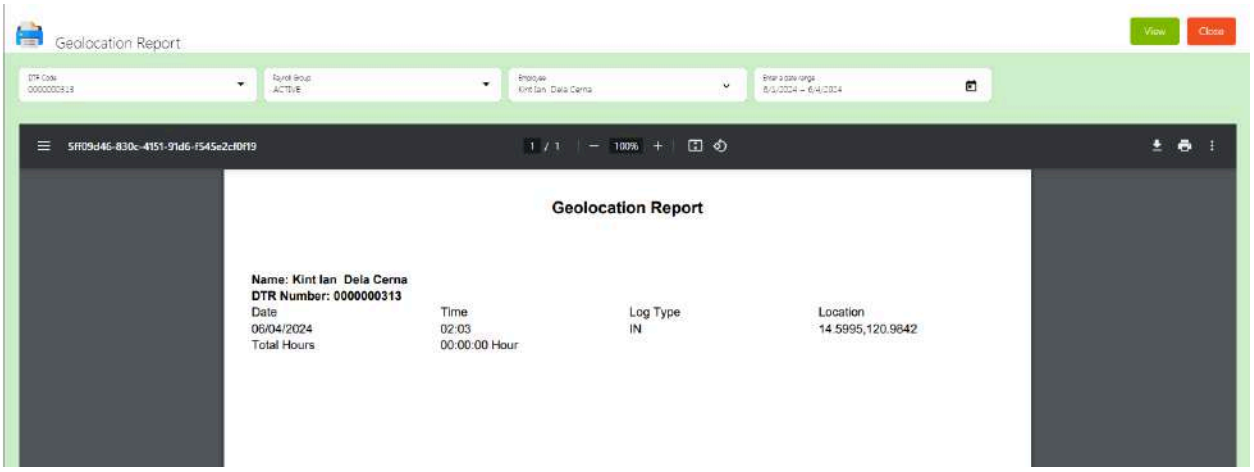
Geolocation Report

Overview

A Geolocation Report is a document that details geographic locations where the time In and Out of the Employee is recorded which includes location data (latitude and longitude), time stamps, date, and log types.

Geolocation Report

- Generate or view report
    - Select DTR Code
    - Select Payroll Group
    - Select Employee
    - Enter Date Range



- The user can **Download** this report and also can **Print**.

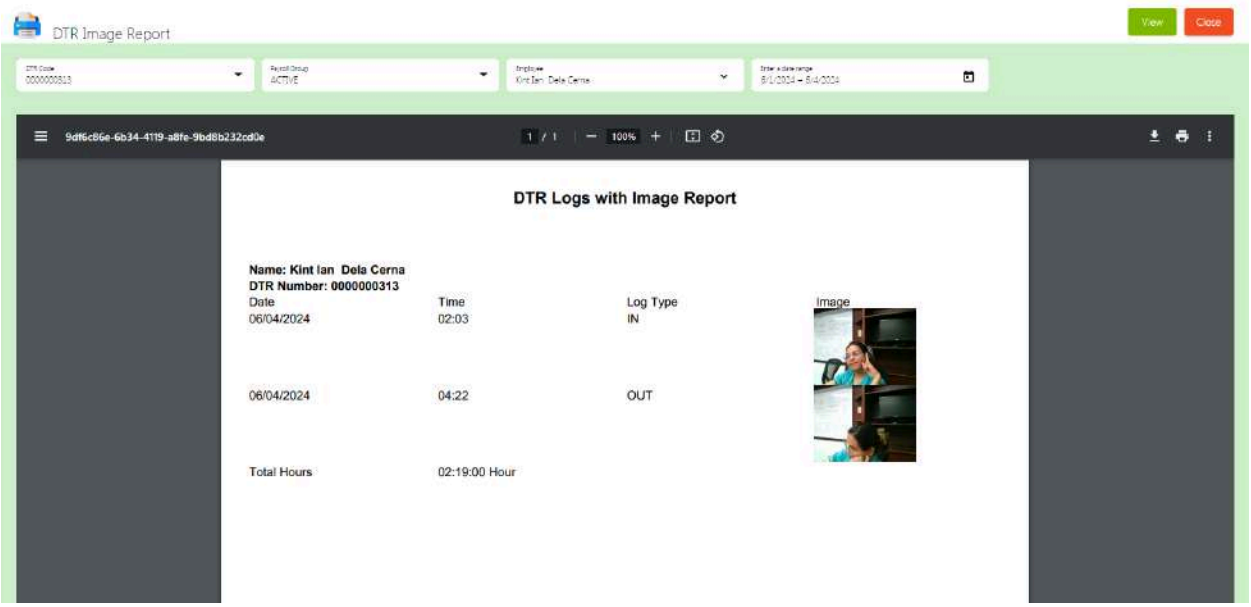
DTR Image Report

Overview

A DTR (Daily Time Record) Image Report is a concise document summarizing employees' attendance and work hours with employees' images, often captured by the camera. It provides a visual representation of each employee's clock-in and clock-out times, helping employers track attendance, monitor punctuality, and ensure compliance with company policies. These reports streamline payroll processing and facilitate efficient workforce management by offering an accurate record of daily activities.

DTR Image Report

- Generate or view report
    - Select DTR Code
    - Select Payroll Group
    - Select Employee
    - Enter Date Range

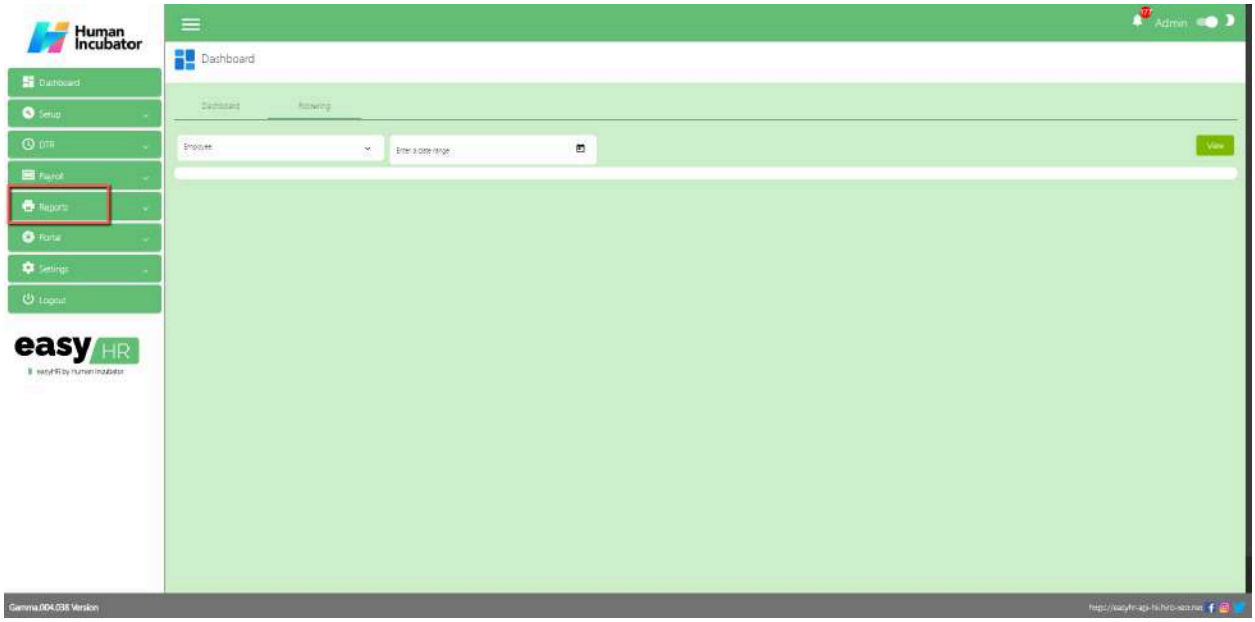


- The user can **Download** this report and also can **Print**.

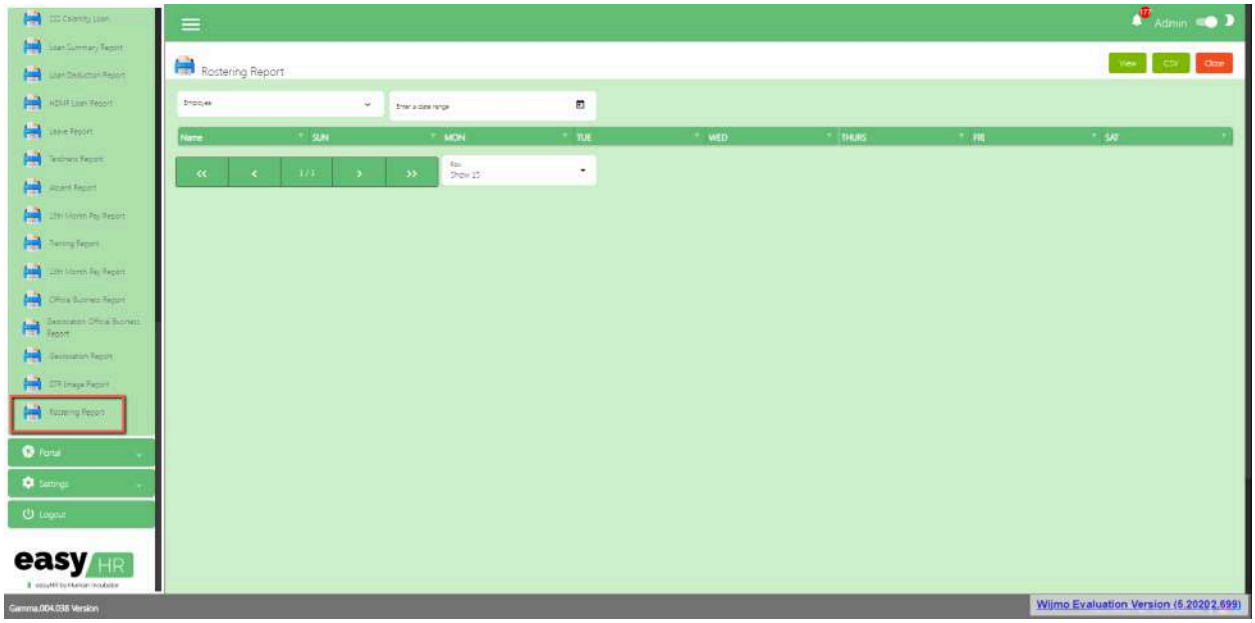
Rostering Report

Steps

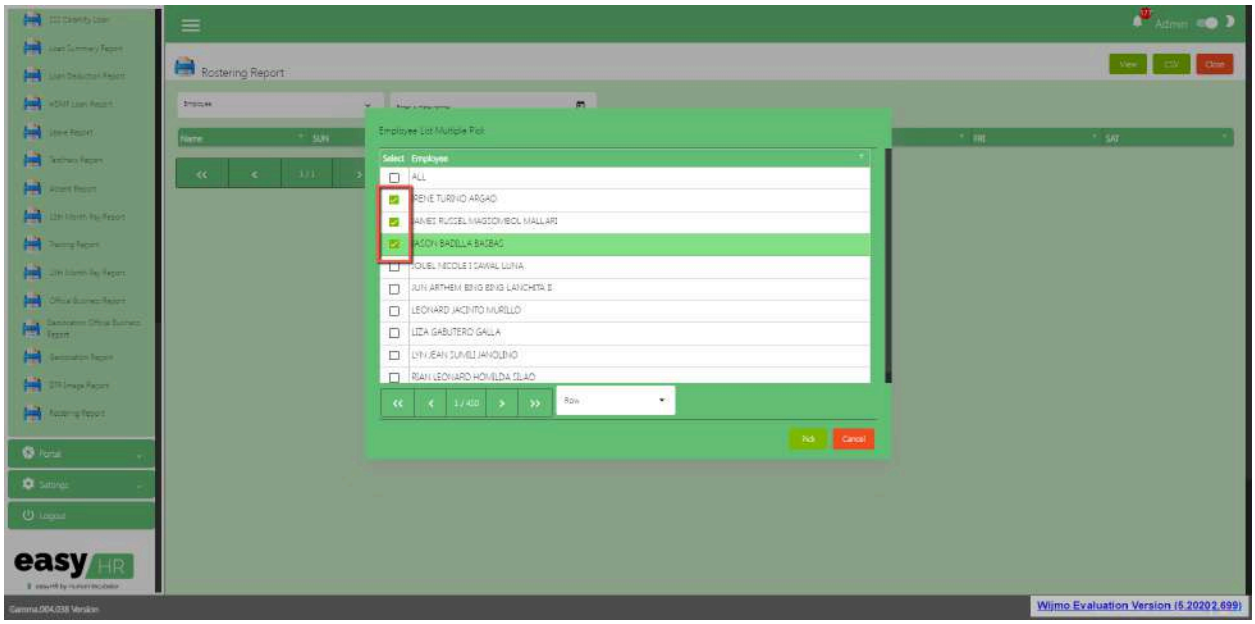
1. Go to Reports Module



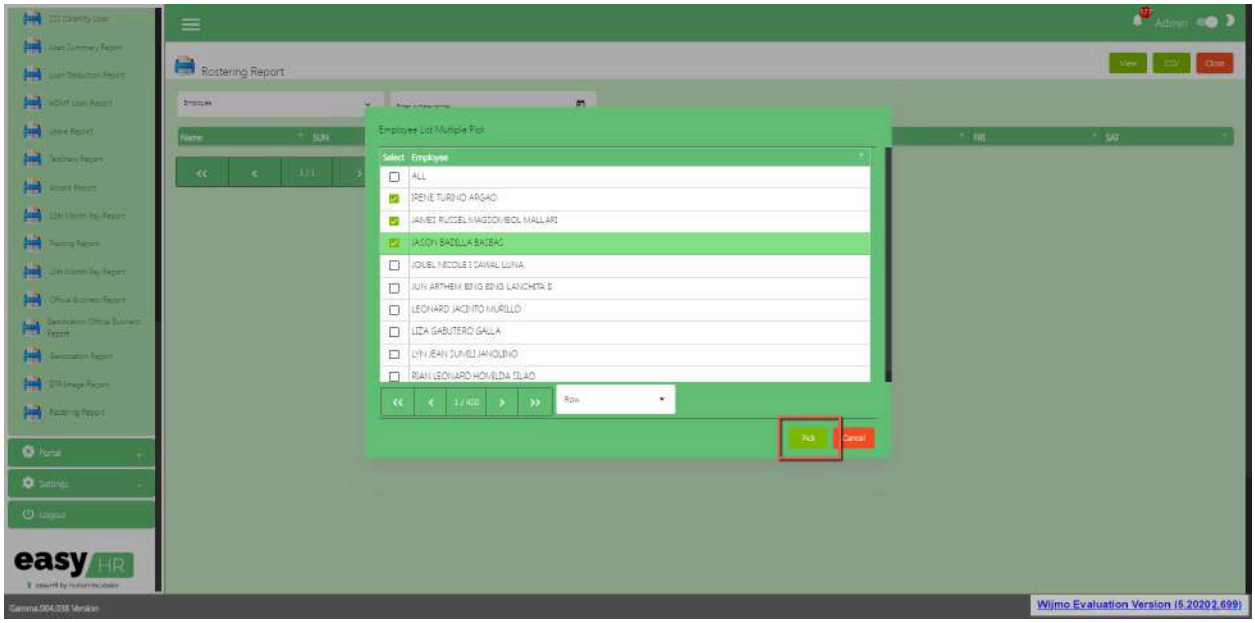
2. Click Rostering Report



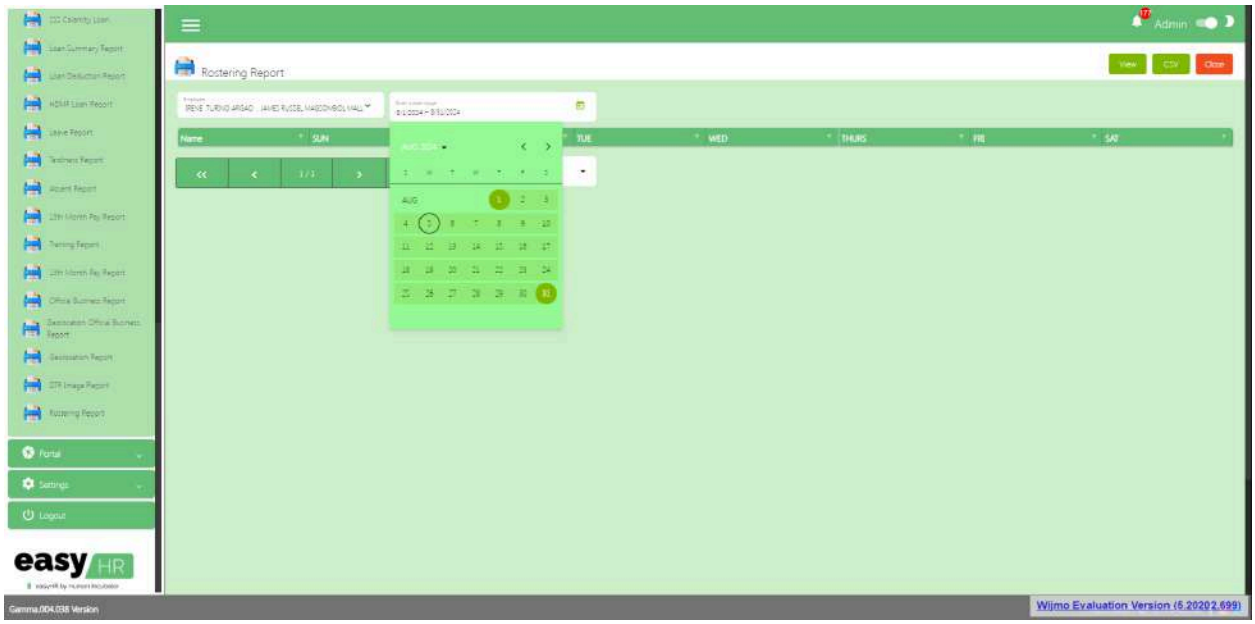
3. Click checkbox to Select one or multiple employees



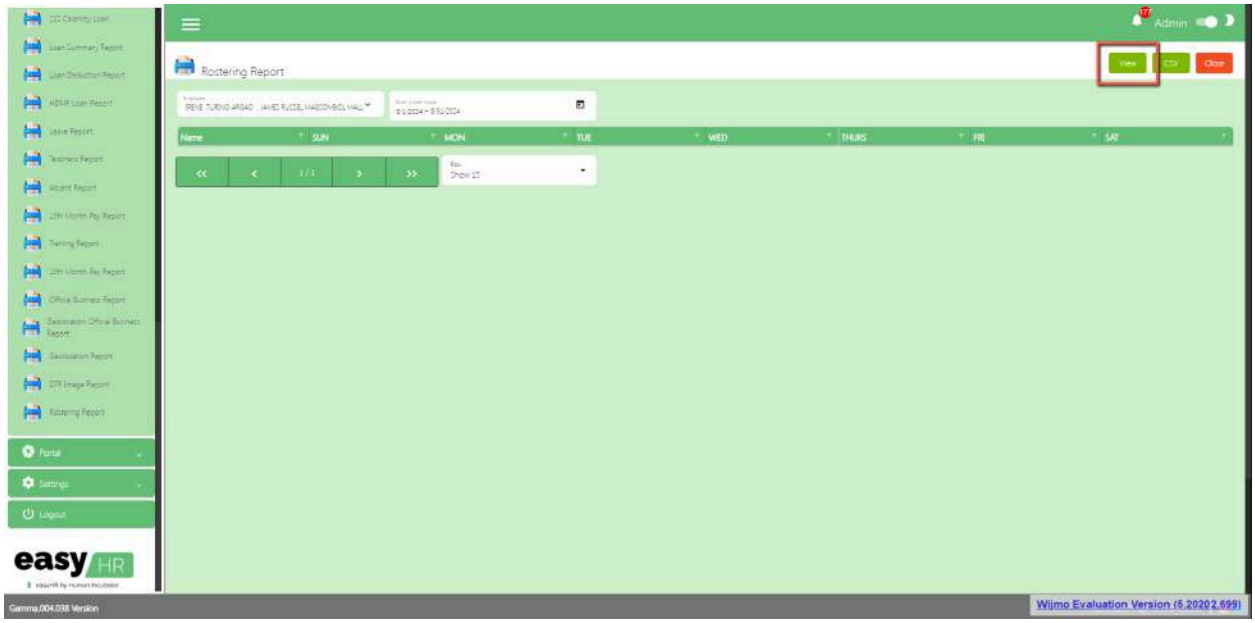
4. Click Pick



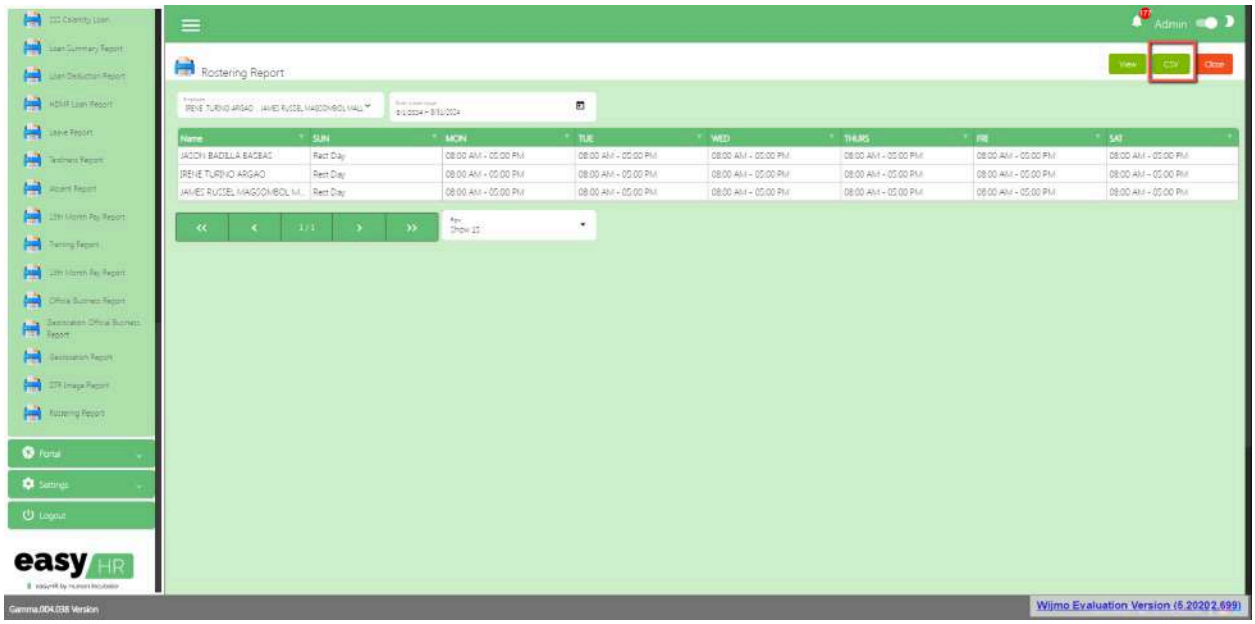
5. Select Date Range



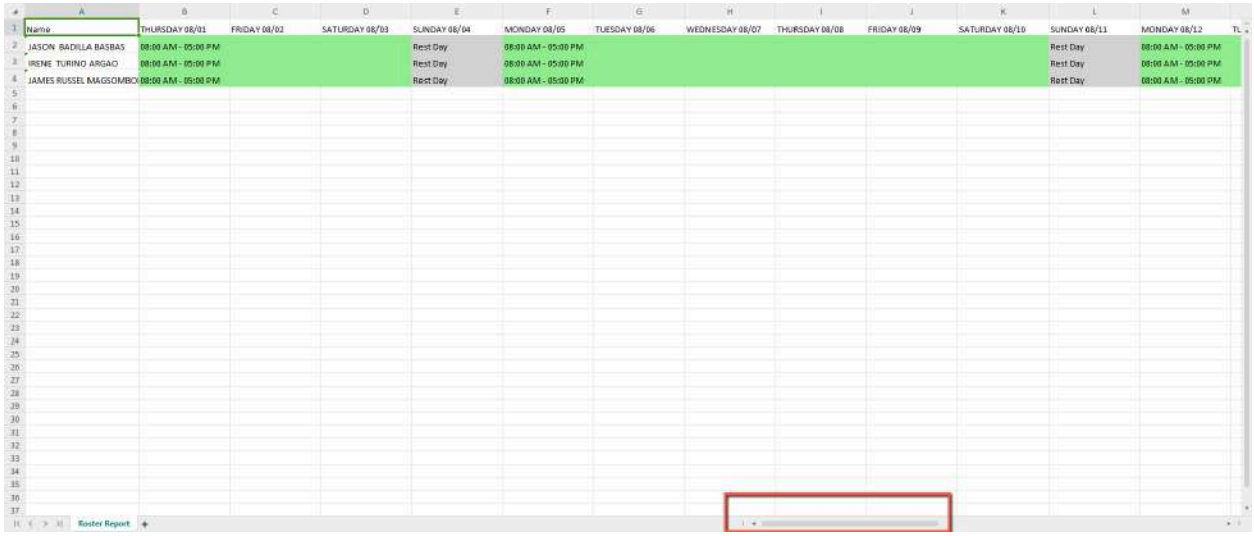
6. Click View



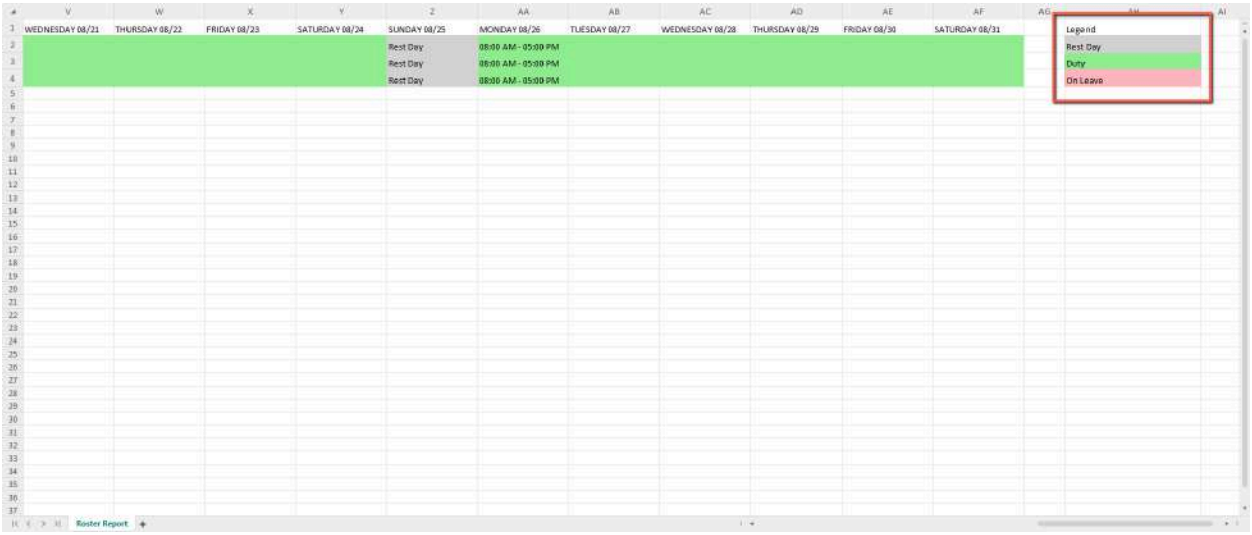
7. Click CSV to download CSV file of this report



8. Scroll sideways to view the rest of the dates



9. You can check for the legends at the end of the scroll



Section VIII: Portal

Employee Portal

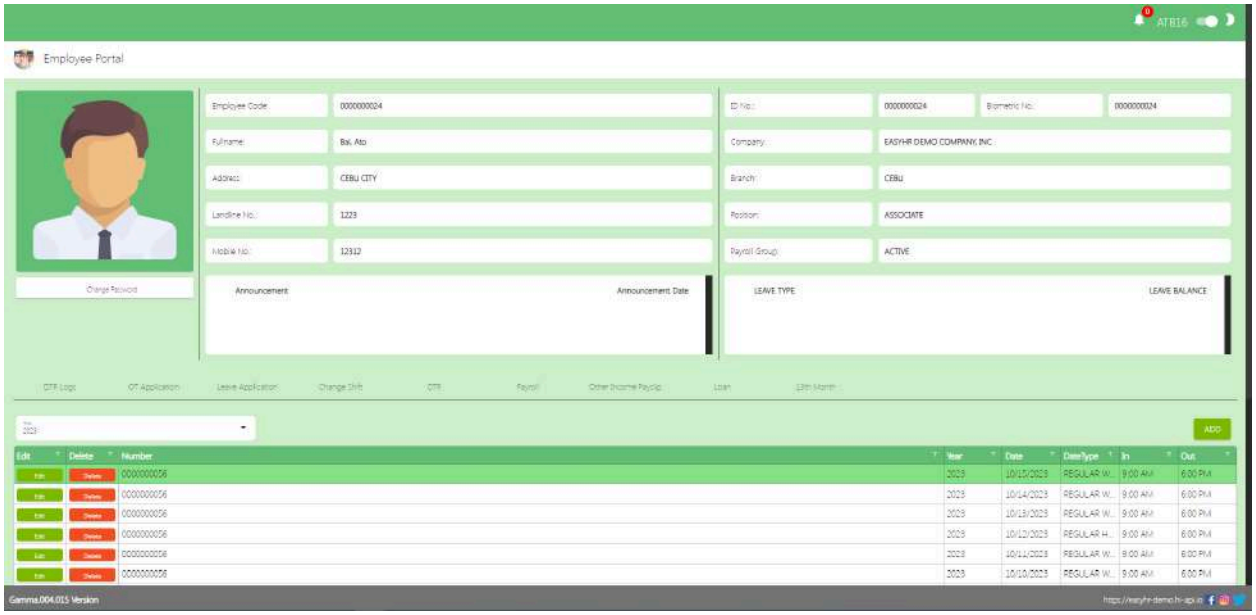
Overview

- Employee Portal is used to provide employees with access to a wide range of information, tools, and self-service features related to their employment and the organization they work for and also the employee can view the DTR logs, Payslip, and 13th month.

Employee Portal

- Shows the information of the employee and also can view the leave balances
- The Employee can Change Password
- There are 9 tabs of employee portal
    - DTR logs
    - Overtime Application
    - Leave Application
    - Change Shift
    - DTR

- Payroll
- Other Income Payslip
- Loan
- 13th Month

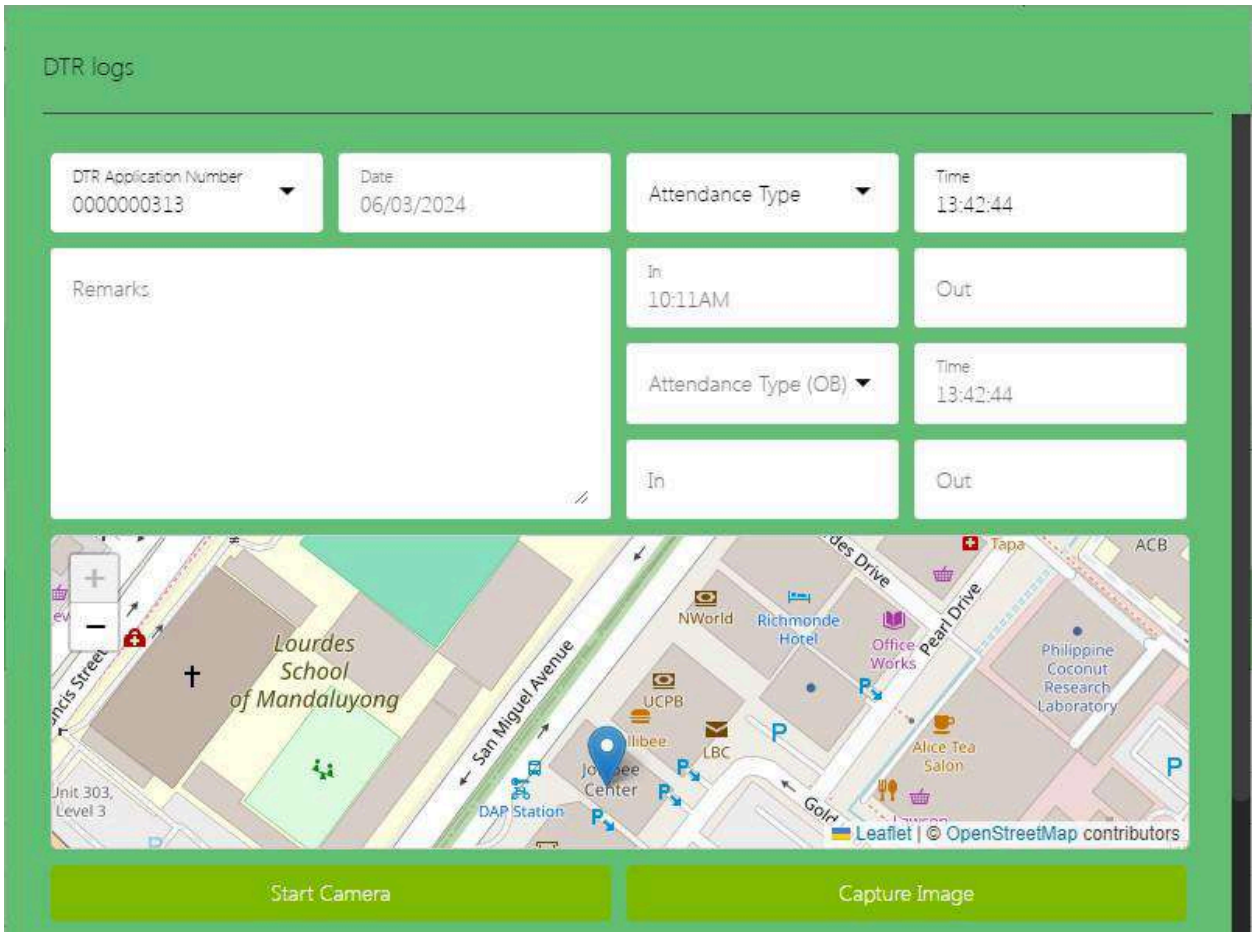


DTR logs

- In the **DTR logs** tab the employee can **Add** DTR logs.

- **Assumption**: The employee already clicked the **Add** button on the upper right corner in the DTR logs Tab.
    - Select DTR Application number
    - Select Attendance Type
    - Input Remarks
    - Click Start Camera
    - Click Capture Image
    - Click **Save** button to add DTR log with Geolocation and Captured Image.

    Note: Make sure the DTR number should not be locked by the admin so that employees can access the DTR Application number in DTR logs.

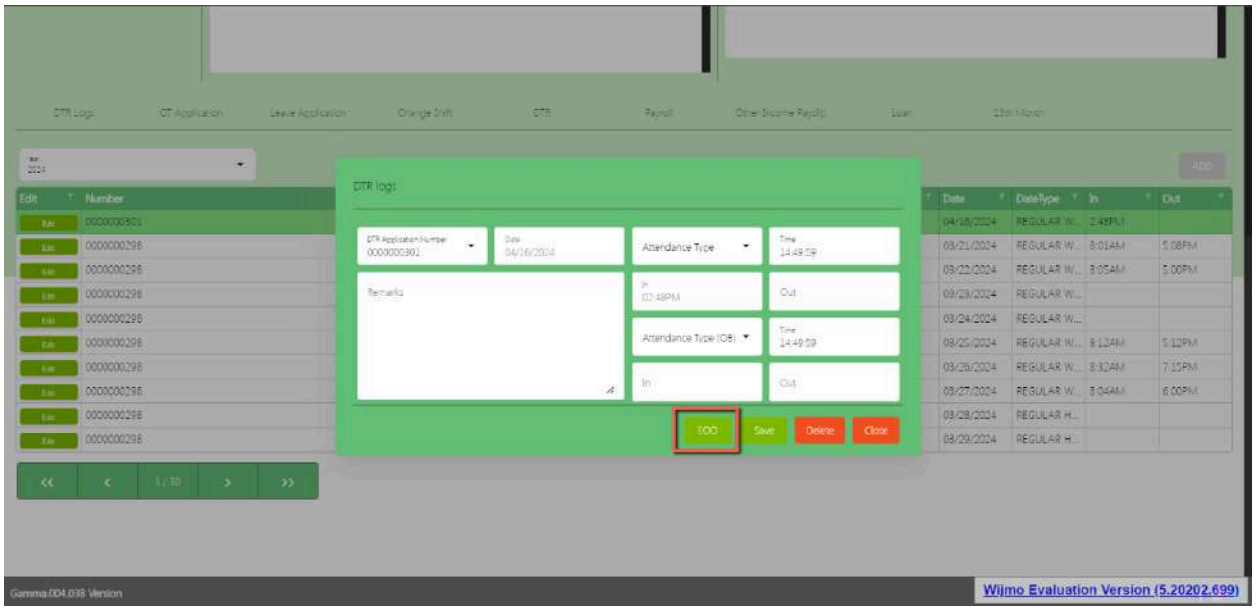


- Additionally once you click **Save** the **Add** button will be temporarily disabled,

- in order for the Add button to be enabled again an **EOD** must perform first.

  EOD (End of Day)

  - DTR Logs
  - Click **Edit**
  - Click **EOD**

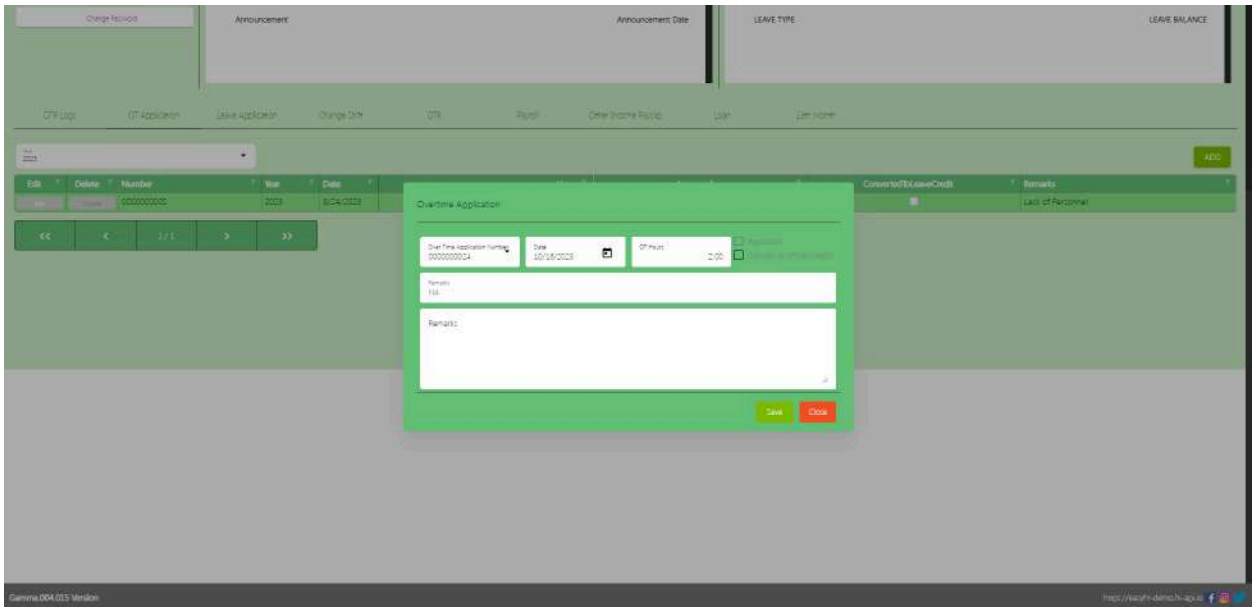


- After clicking the **EOD** button there is a message that “EOD Updated Successfully!”, and the **Add** button will be enabled.

OT Application

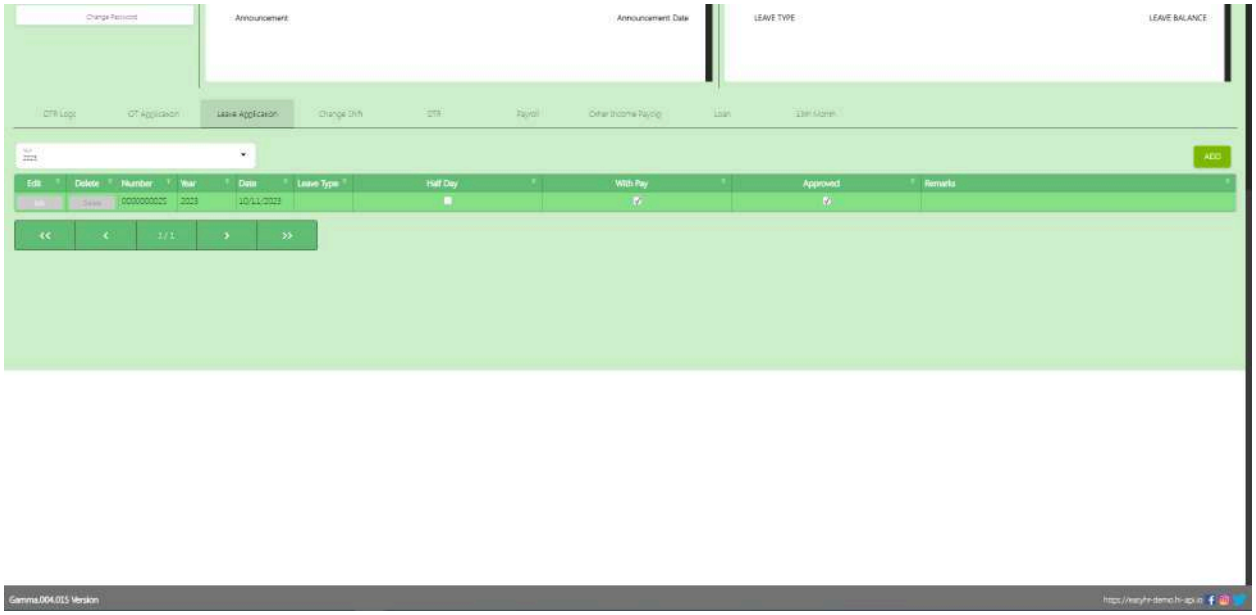
- In the **OT Application** tab the employee can **Add** overtime application.

- **Assumption**: The employee already clicked the **Add** button on the upper right corner in the OT application tab.
  Note: Make sure the OT number should not be locked by the admin so that employees can access the Overtime Application number in Overtime Application.
  - Select Overtime Application number
  - Select Date
  - Input OT Hours
  - Input Remarks
  - The Employee can Check the Checkbox **Convert to Offset Credits**
  - Click **Save** button to add in overtime application employee table.



Leave Application

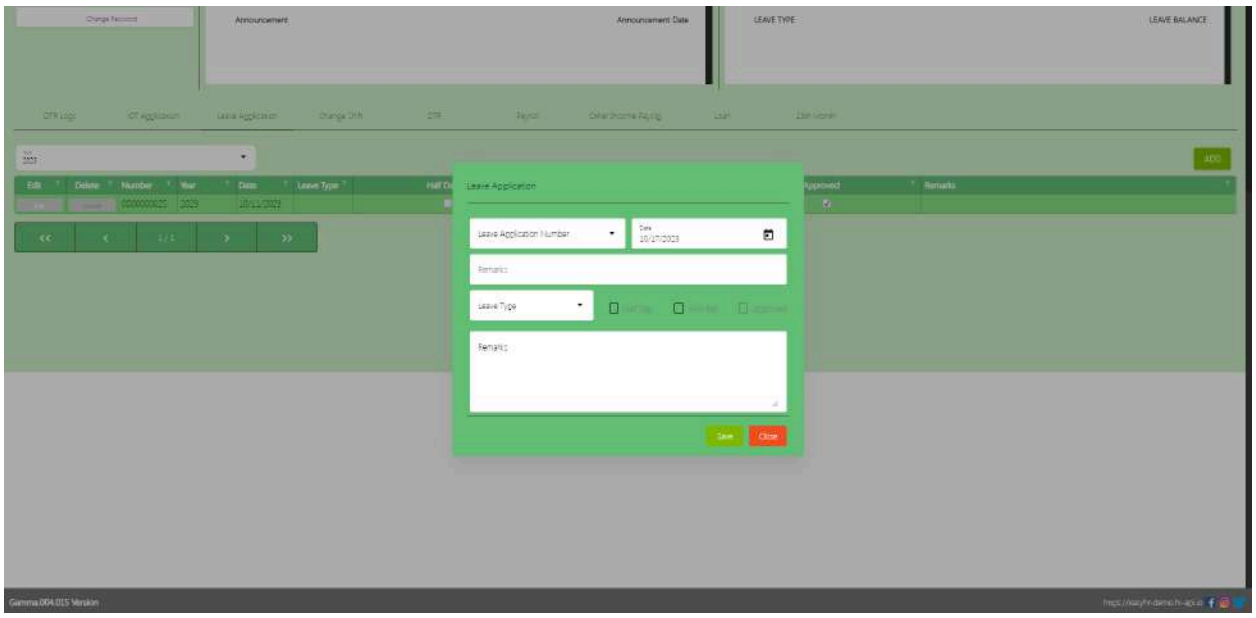
- In the **Leave Application** tab the employee can **Add** a leave application.



- **Assumption**: The employee already clicked the **Add** button on the upper right corner in the Leave application tab.

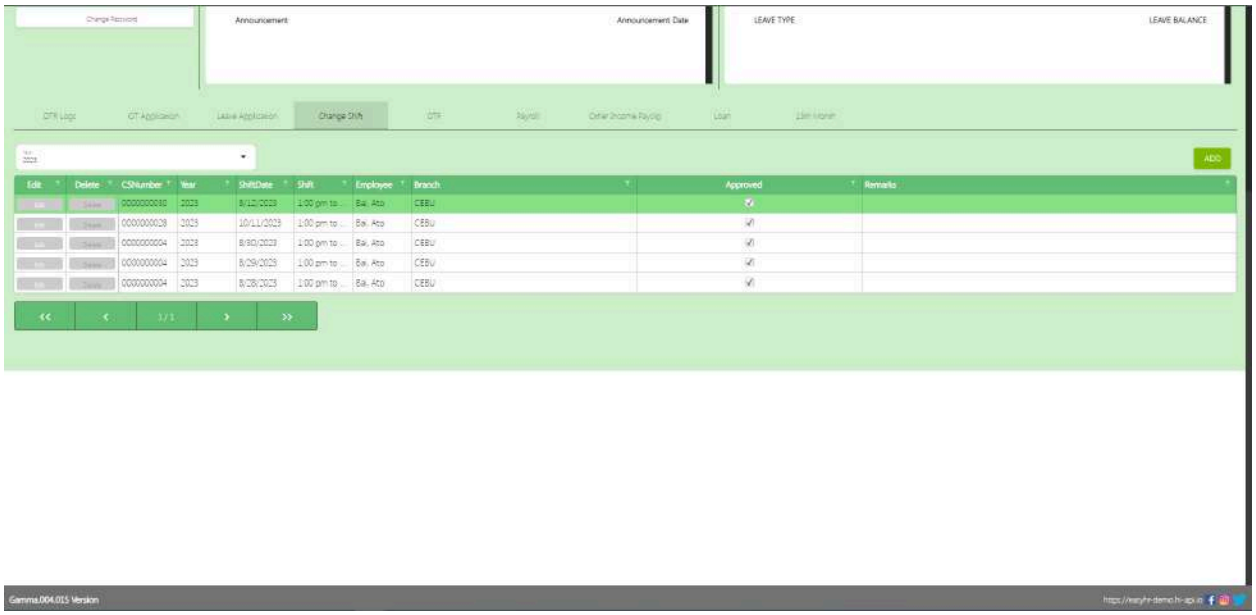
  Note: Make sure the LA number should not be locked by the admin so that employees can access the Leave Application number in Leave Application.

- Select Leave Application number
- Select Date
- Select Leave Type
- Check the **Checkbox** if **Half Day** or **With Pay**
- Input Remarks
- Click **Save** button to add in the leave application employee table.

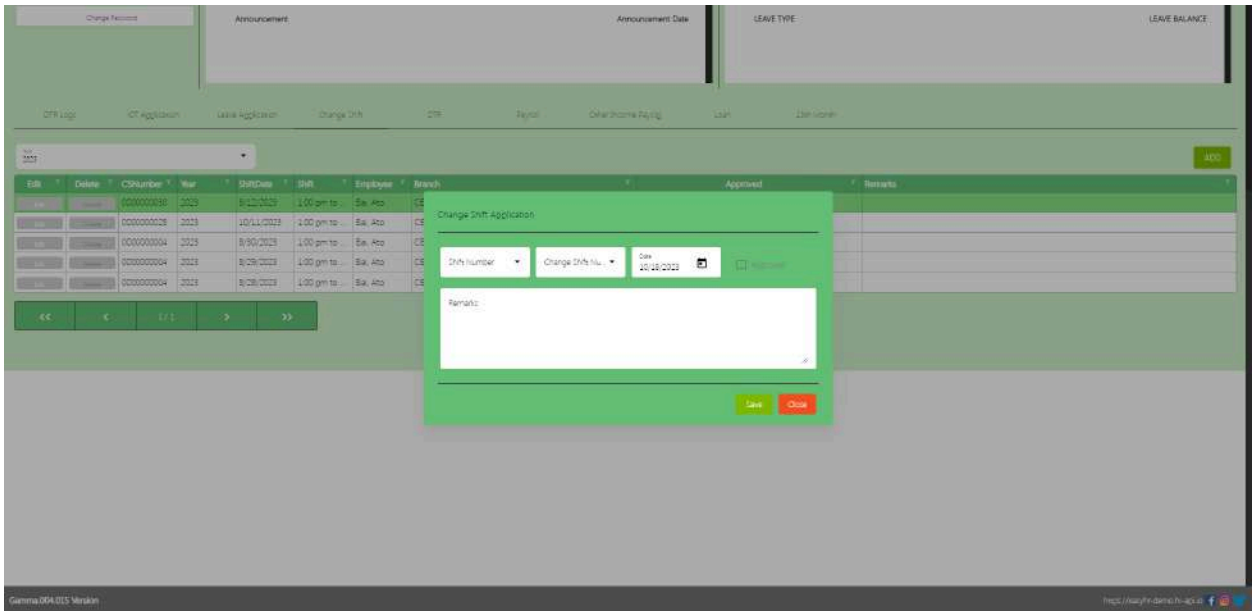


Change Shift

- In the **Change Shift** tab the employee can **Add** a Change Shift.

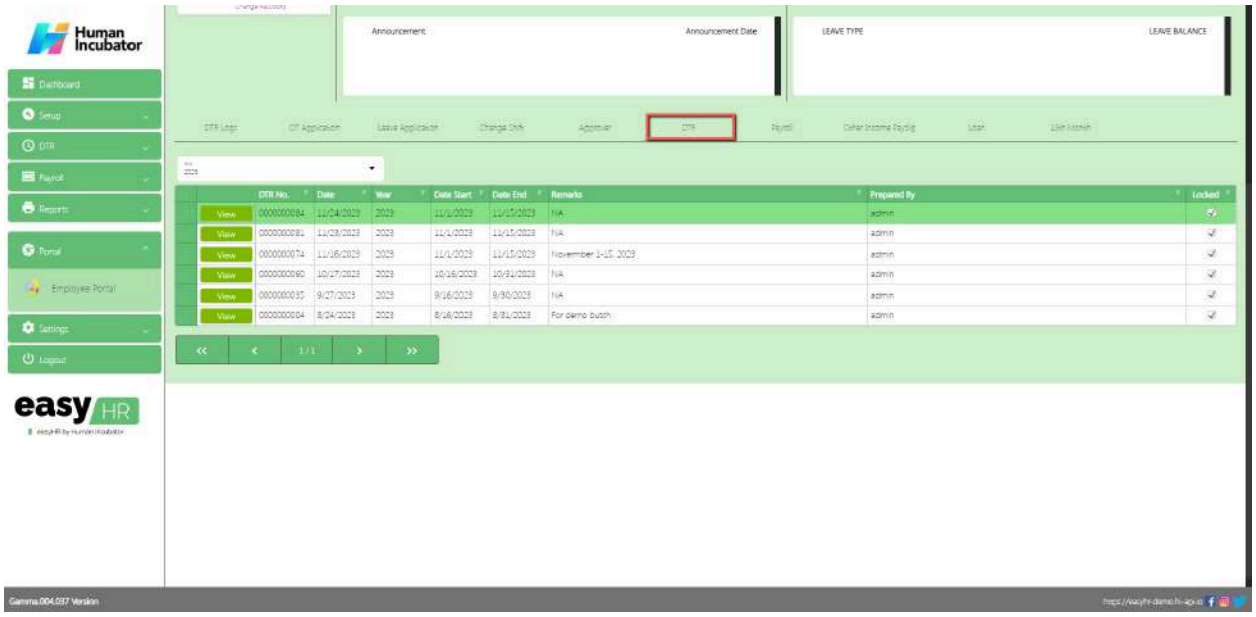


- **Assumption**: The employee already clicked the **Add** button on the upper right corner in the Change Shift tab.
  Note: Make sure the CS number should not be locked by the admin so that employees can access the Change Shift number in Change Shift.
  - Select Shift number
  - Select Change Shift number
  - Select Date
  - Input Remarks
  - Click **Save** button to add in the Change Shift employee table.

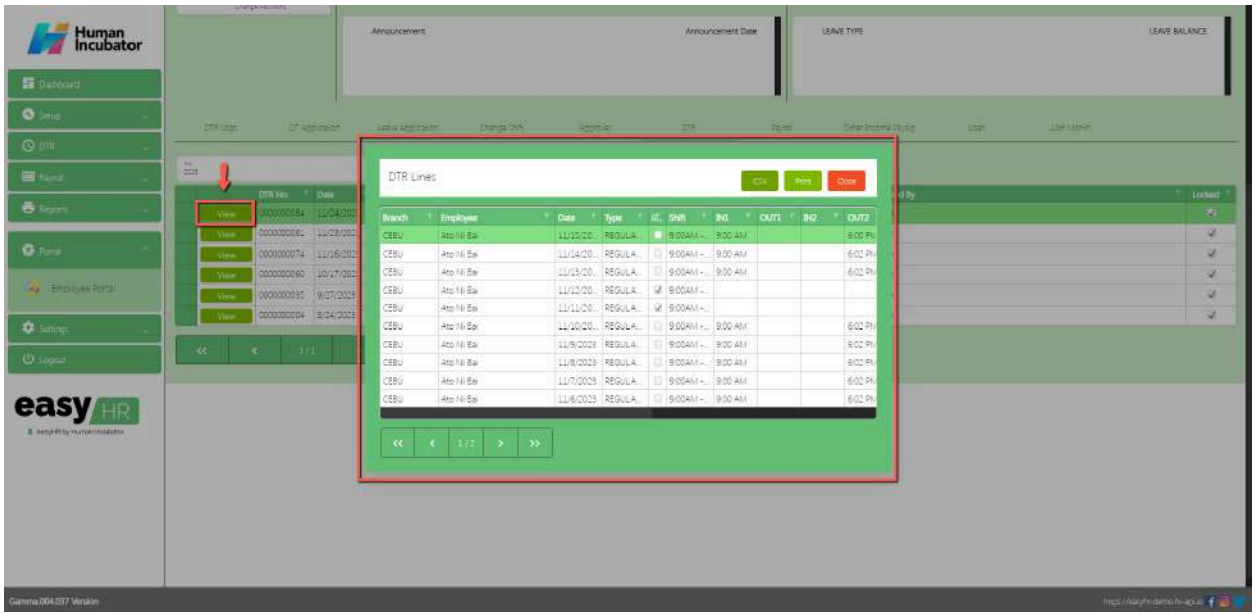


DTR

- In the **DTR** tab the employee can **View, Download CSV and Print** DTR logs.

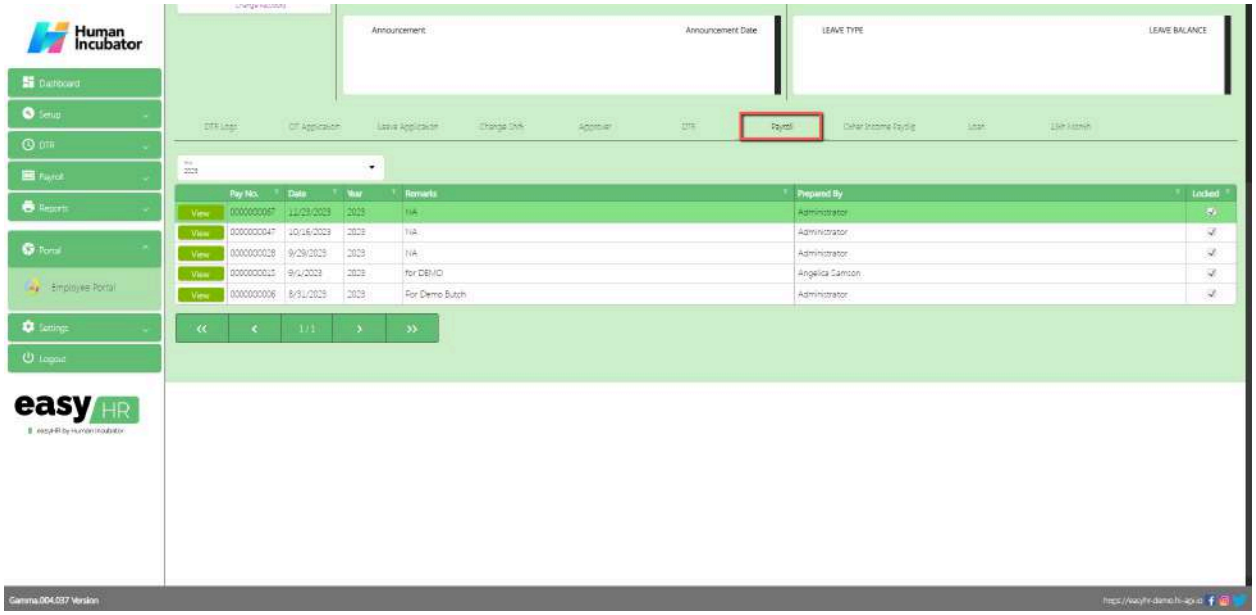


- **Assumption**: The employee already clicked the **View** button on the left side in the DTR table.
    - Can View DTR logs
    - Can Download CSV file
    - Can Print to PDF file

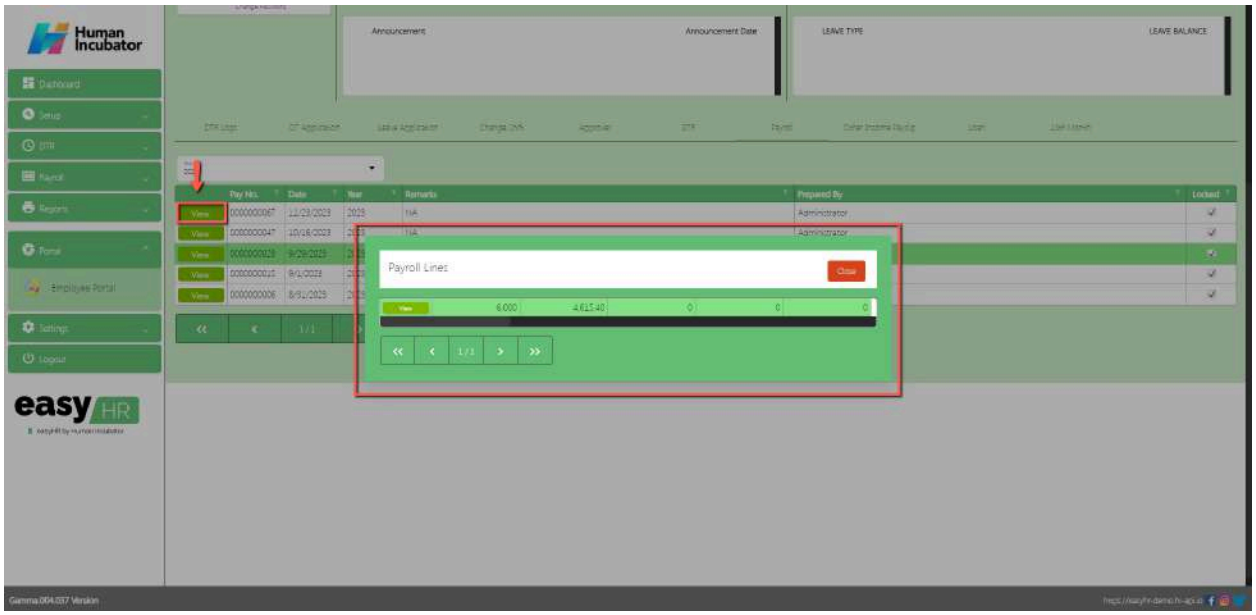


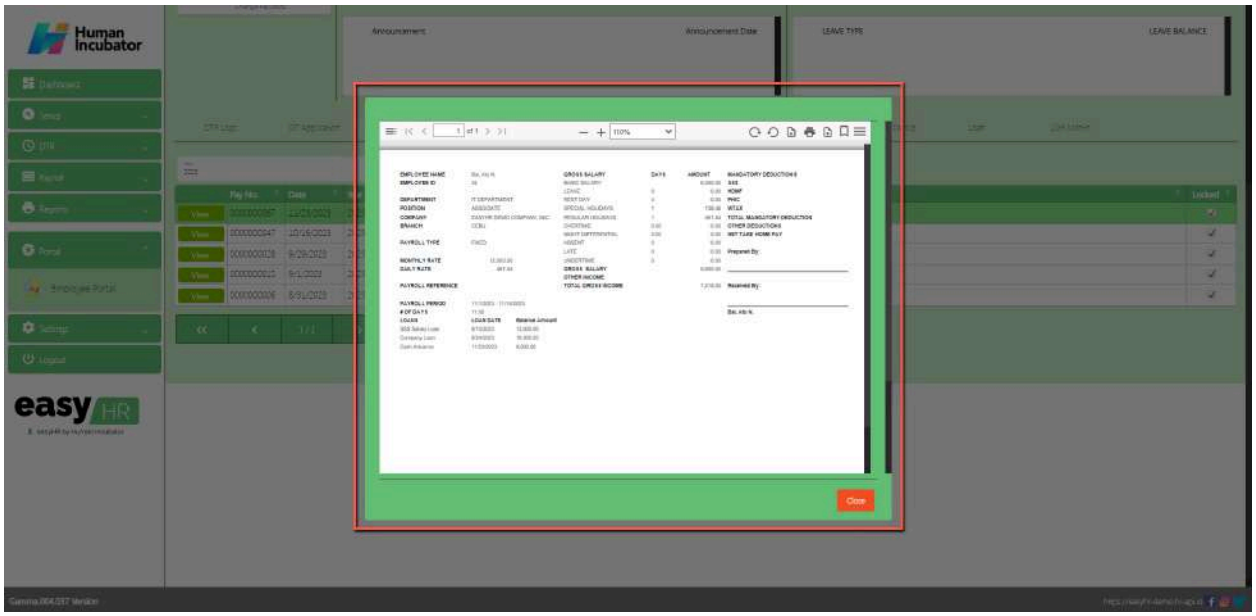
Payroll

- In the **Payroll** tab the employee can view Payroll Lines and Payslip.



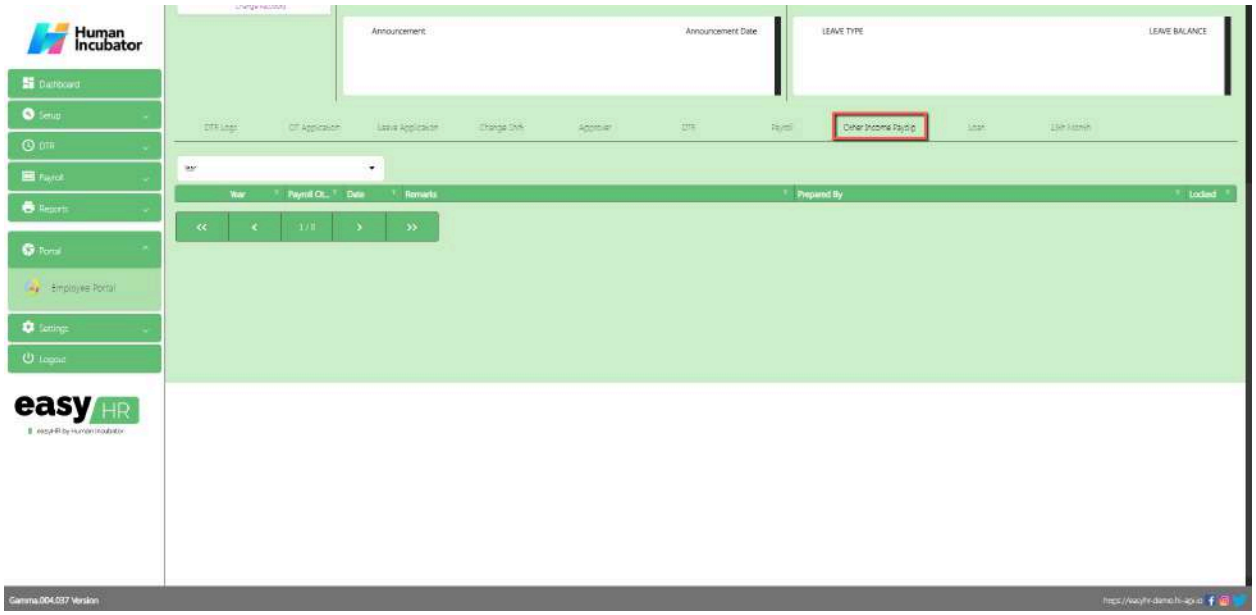
- **Assumption**: The employee already clicked the **View** button on the left side in the Payroll table.
    - Can view Payroll Lines
    - Click **View** button to view payslip
    - Can Download PDF file
    - Can Print



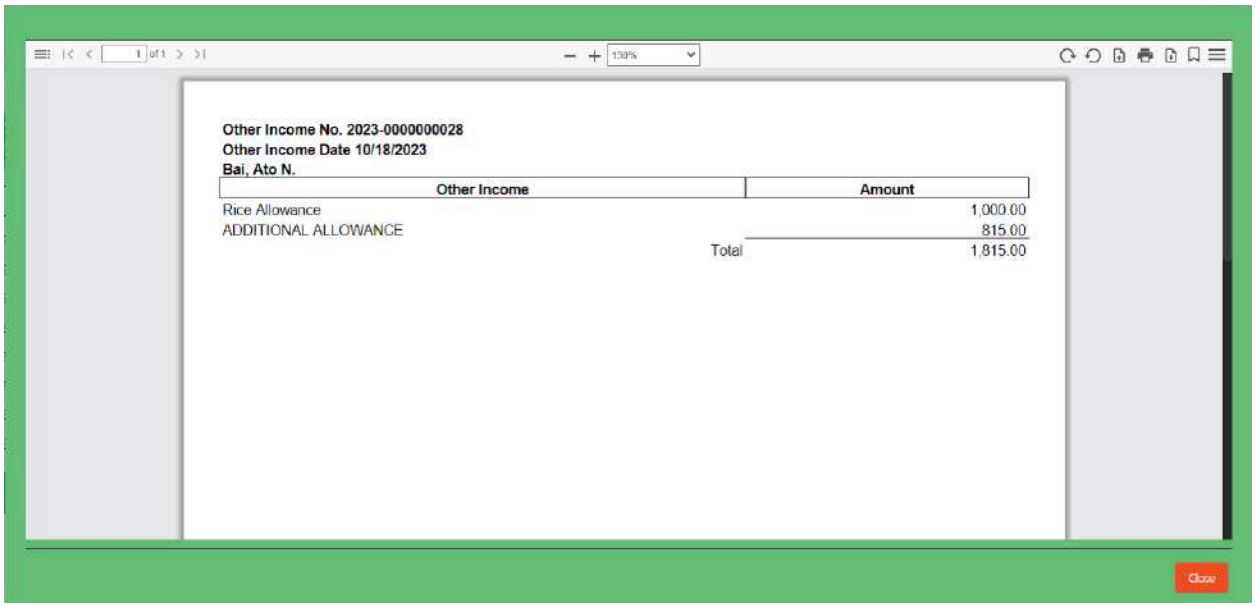


Other Income Payslip

- In the **Other Income Payslip** tab the employee can view Other Income Payslip if the employee has another income.
    - Select Year

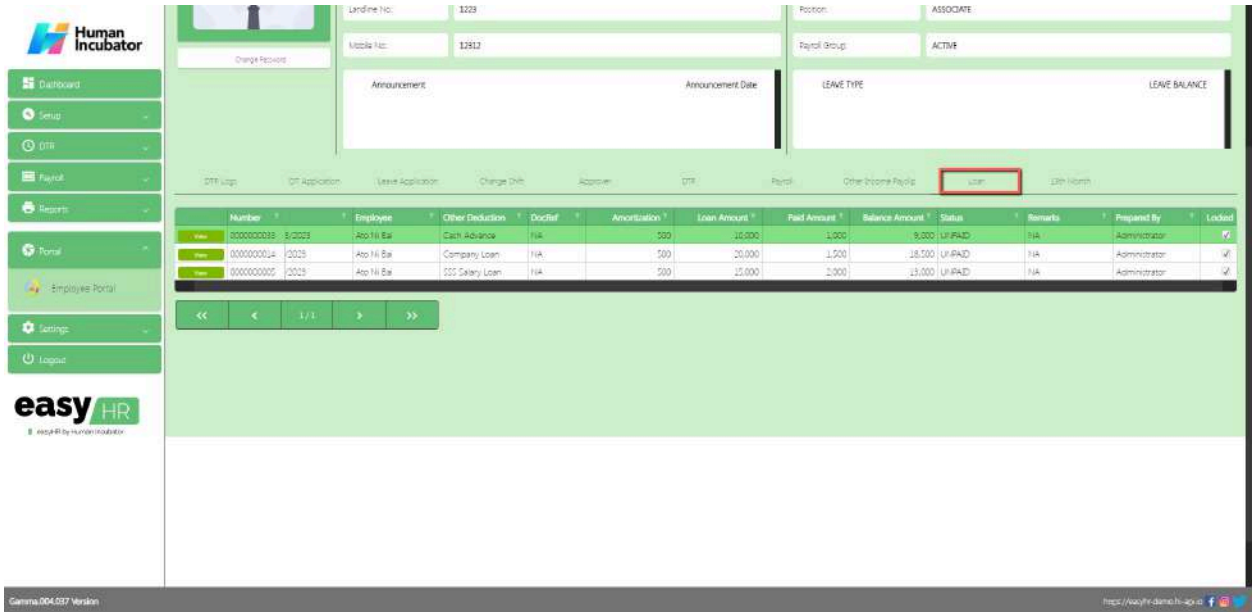


- **Assumption**: The employee already clicked the **View** button on the left side in the Other Income Payslip table.
    - View Other Income Payslip
    - Can Download PDF file
    - Can Print

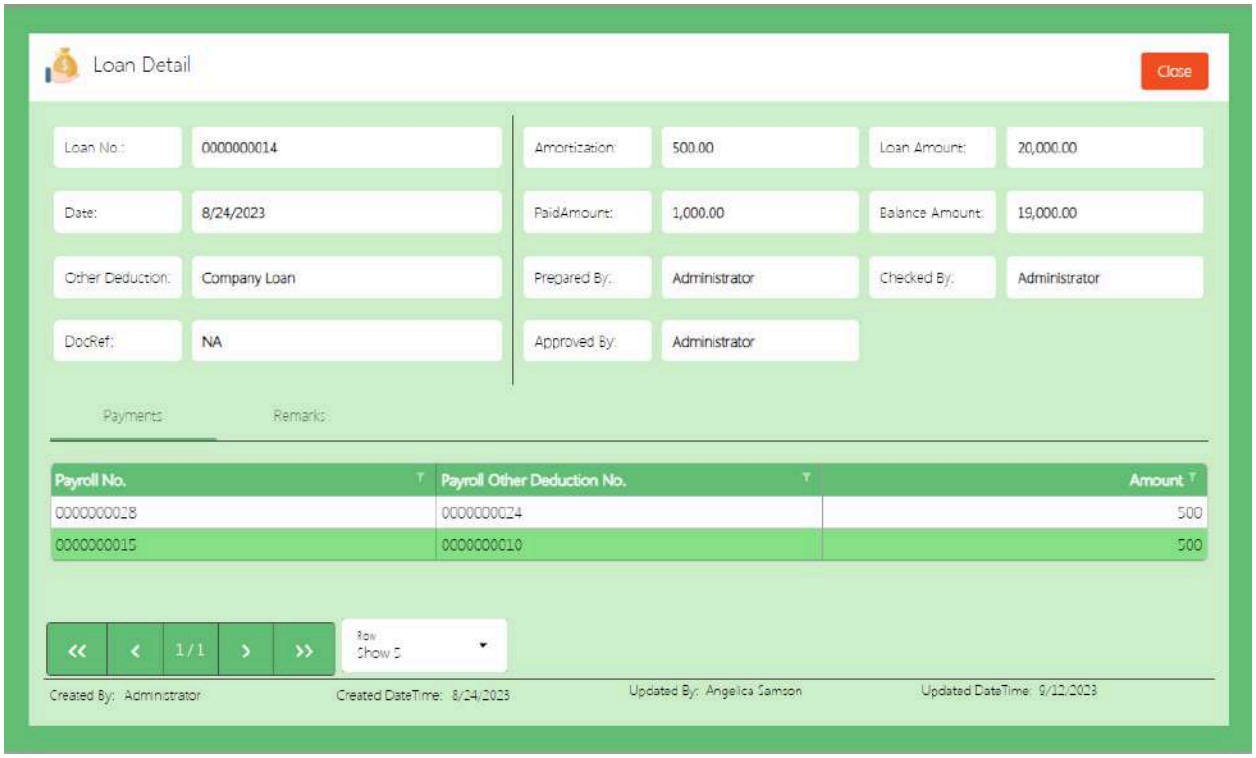


Loan

- In the **Loan** tab the employee can view loan details.



- **Assumption**: The employee already clicked the **View** button on the left side in the Loan table.
    - View Loan Detail

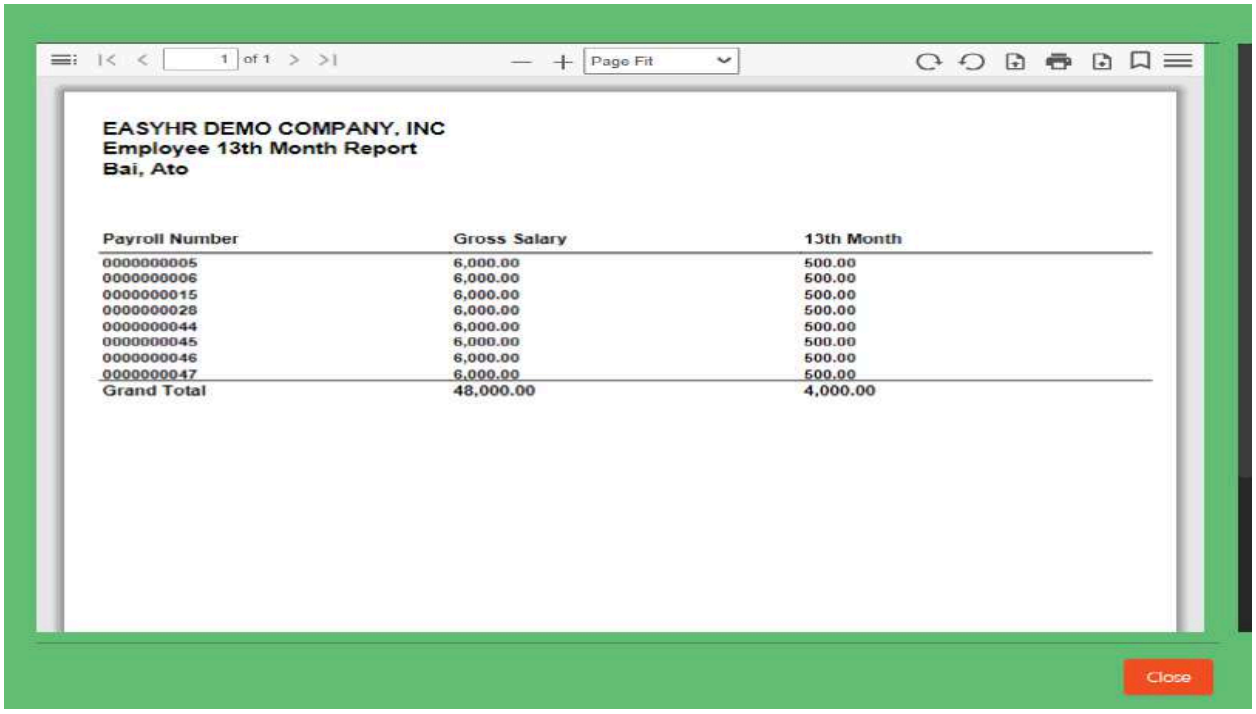


13th Month

- In the **13th Month** tab the employee can view the 13th month.

- **Assumption**: The employee already clicked the **View** button on the right side in the 13th month.

- View Other Income Payslip
- Can Download PDF file
- Can Print

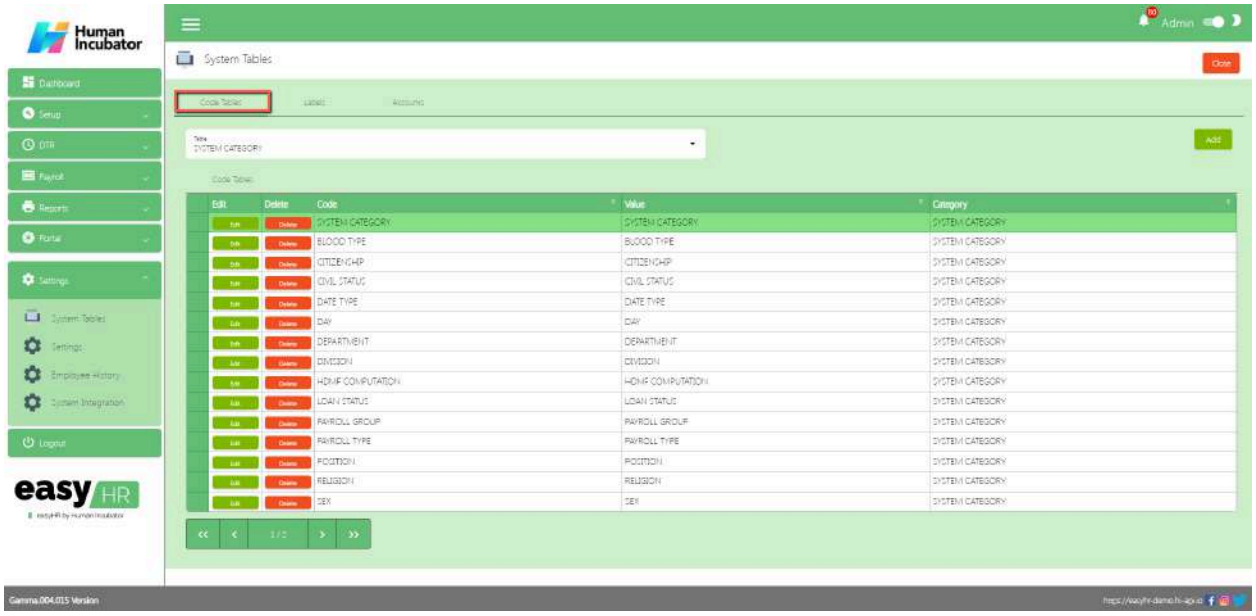


Section IX: Settings

System Tables

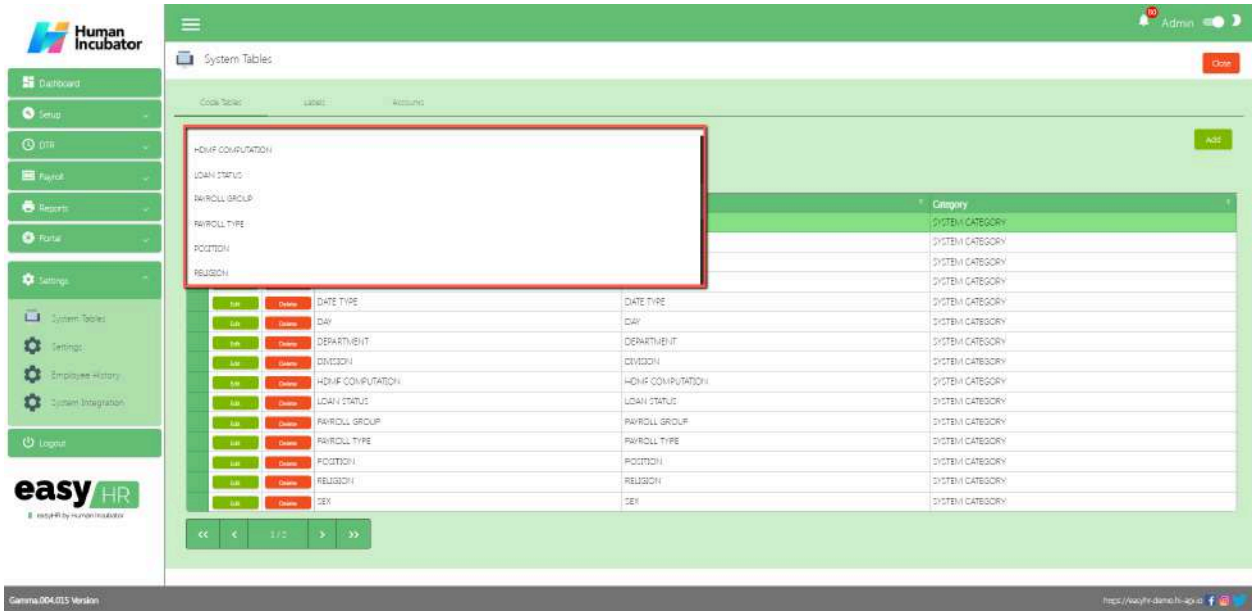
Overview

- System tables are used to add information categories of a company, multiple languages and accounts for integration.
  Note: Do not use special characters only “+”, “-” are allowed.
- There are 3 tabs in system tables
  - Code Tables
  - Labels
  - Accounts

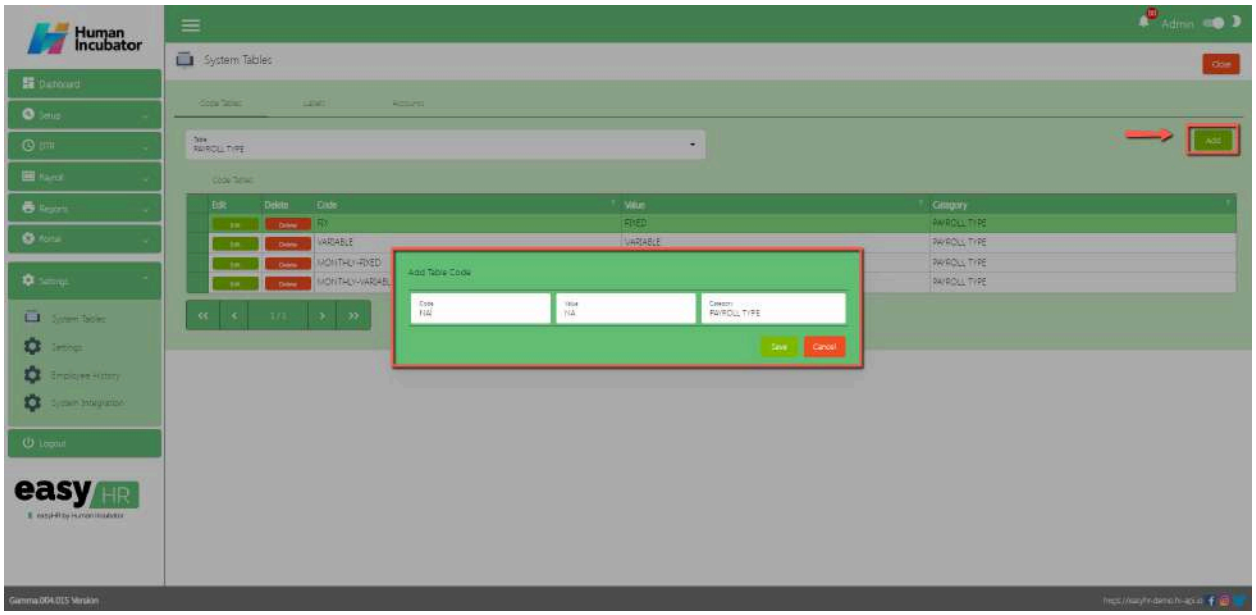


Code Tables

- In the **Code Tables** tab the user can add information about the category of company.
- Select category in dropdown table

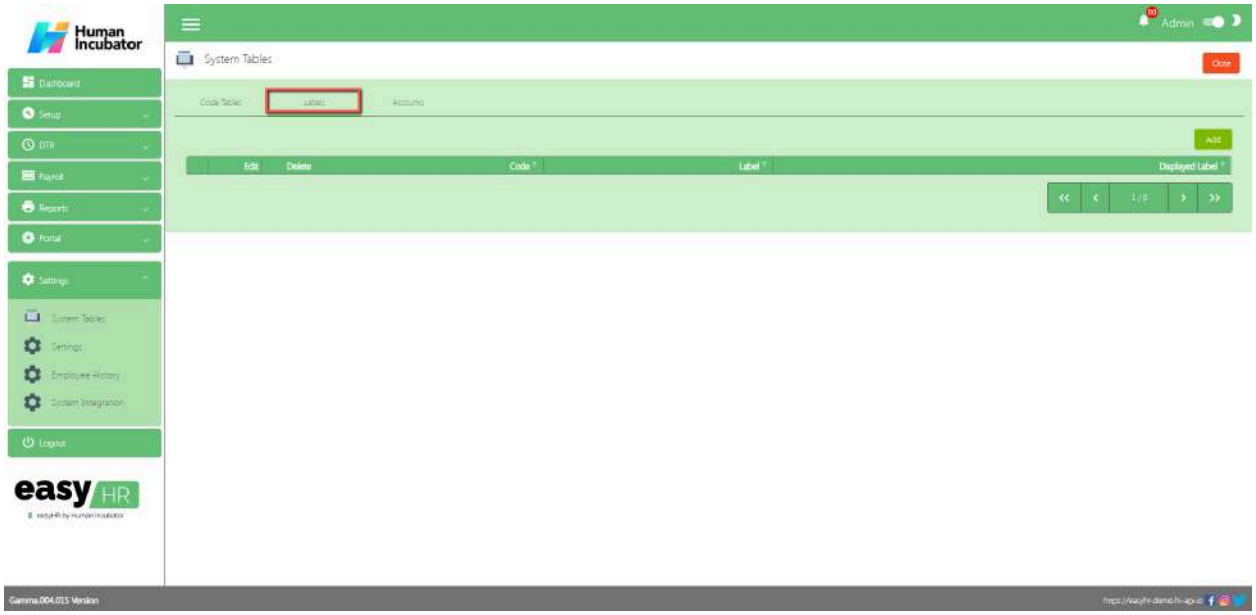


- **Assumption**: The employee already clicked the **Add** button on the right side in the code tables tab.
    - Input Code
    - Input Value
    - Click **Save** button to add in code tables list.



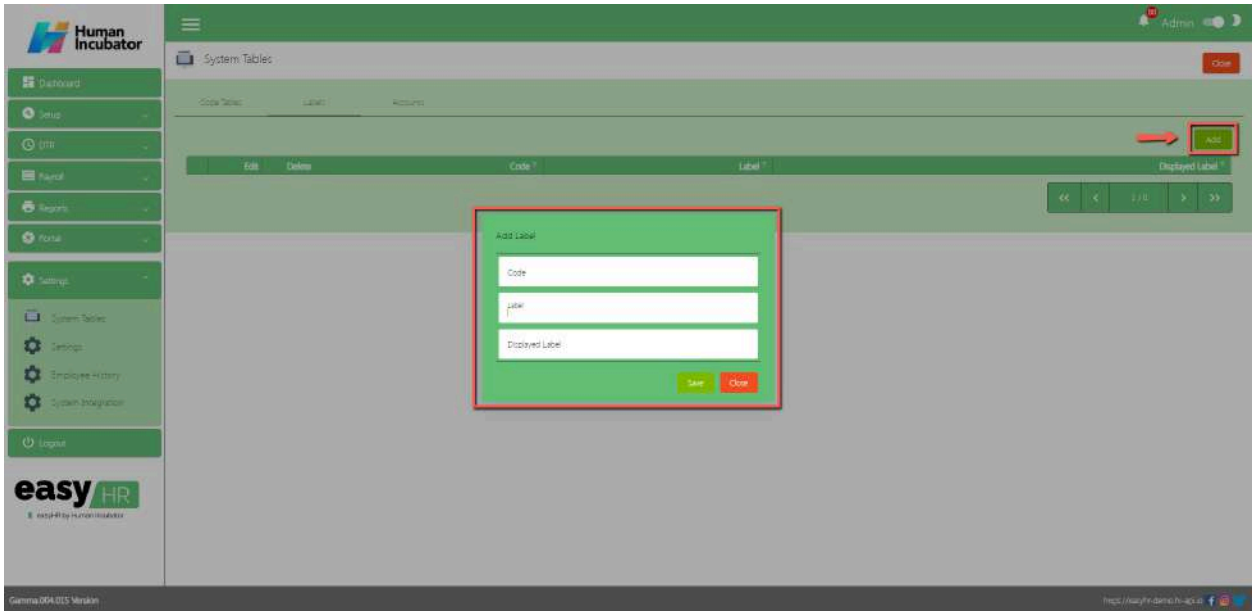
Labels

- In the **Labels** tab the user can add multiple languages.



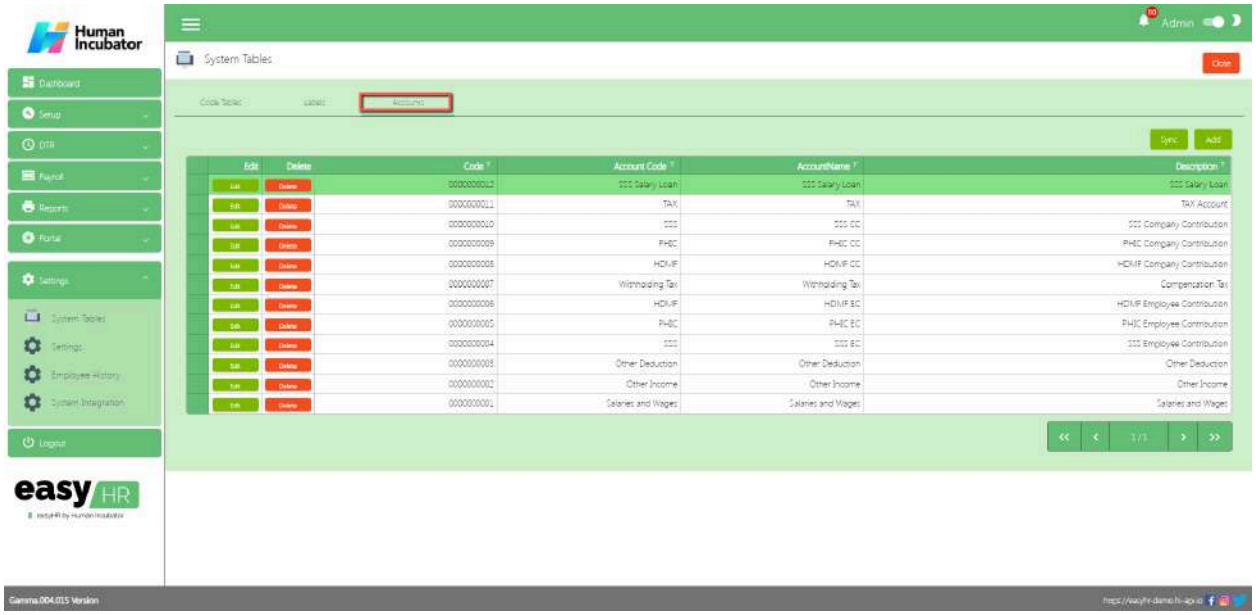
- **Assumption**: The employee already clicked the **Add** button on the right side in the labels tab.
    - Input Label
    - Input Displayed label

- Click **Save** button to add in the label table list.

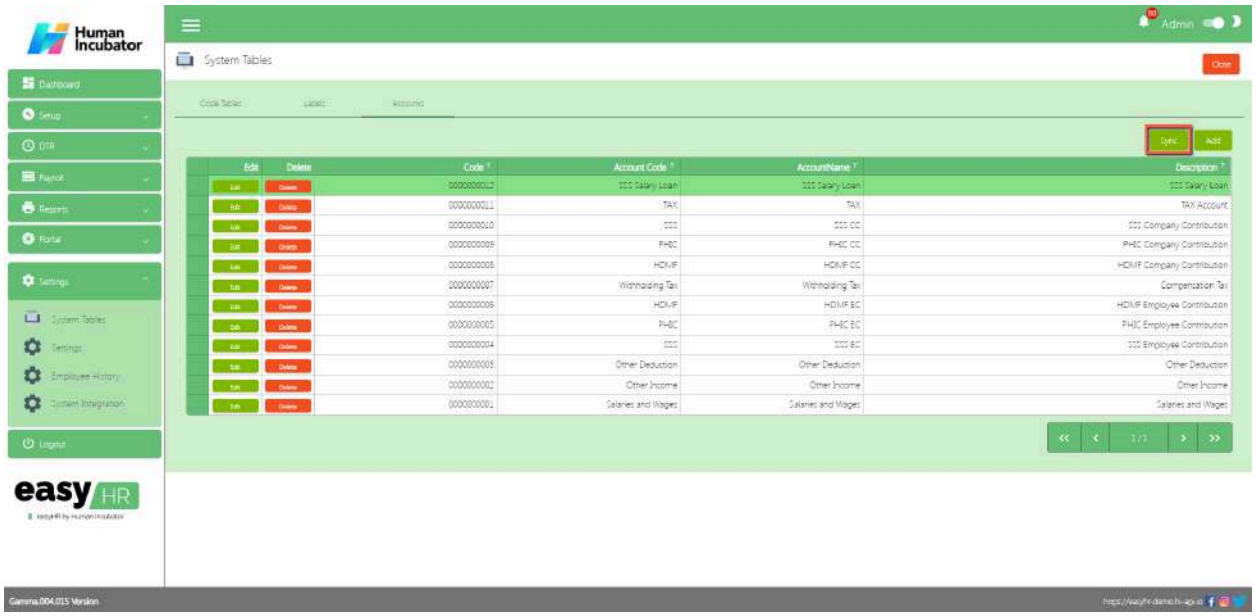


Accounts

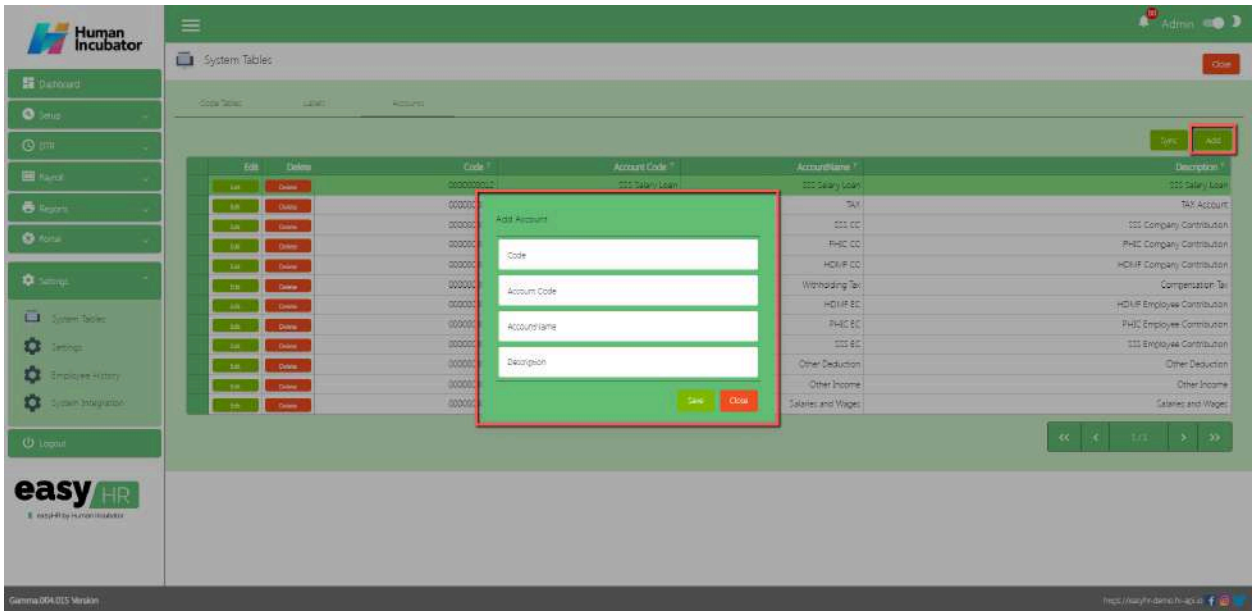
- In the **Accounts** tab the user can sync to EasyFS and add an account.



- The user click the **Sync** button and all the accounts will sync to the EasyFS system.



- The purpose of the **Add** button is to add another account.
    - Click **Add** button
    - Input Account Code
    - Input Account Name
    - Input Description
    - Click **Save** button to add in Accounts table list.



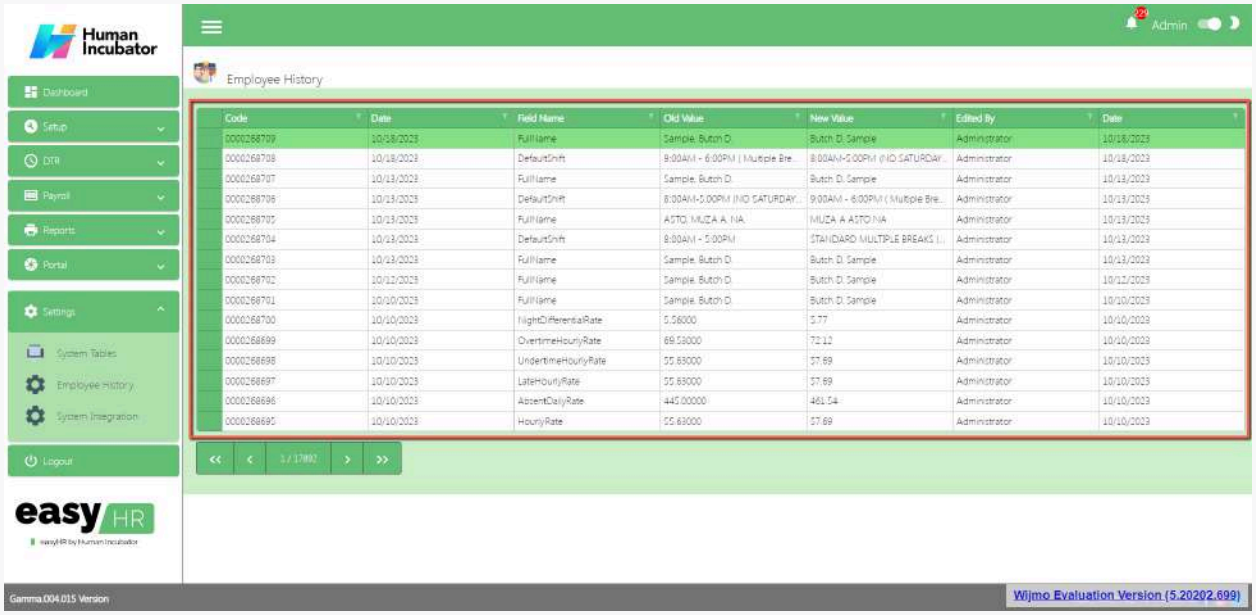
Employee History

Overview

- Employee history is utilized to observe the recent modifications made to employee 201, and it provides visibility into the editor responsible for these changes.

Employee History

- Shows all the list of employee history.



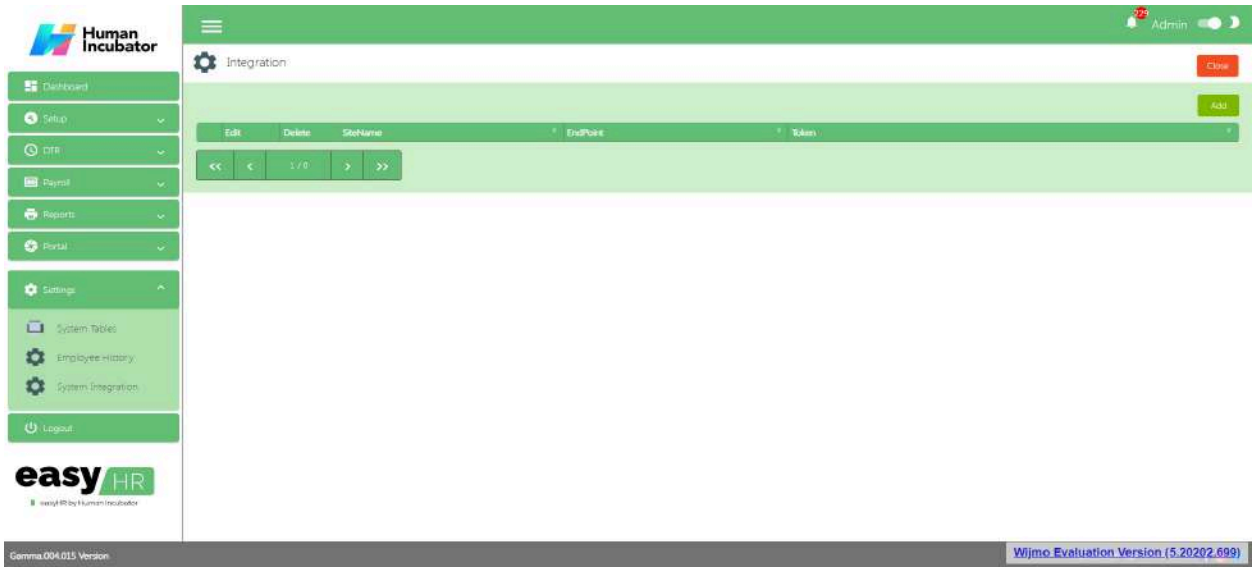
System Integration

Overview

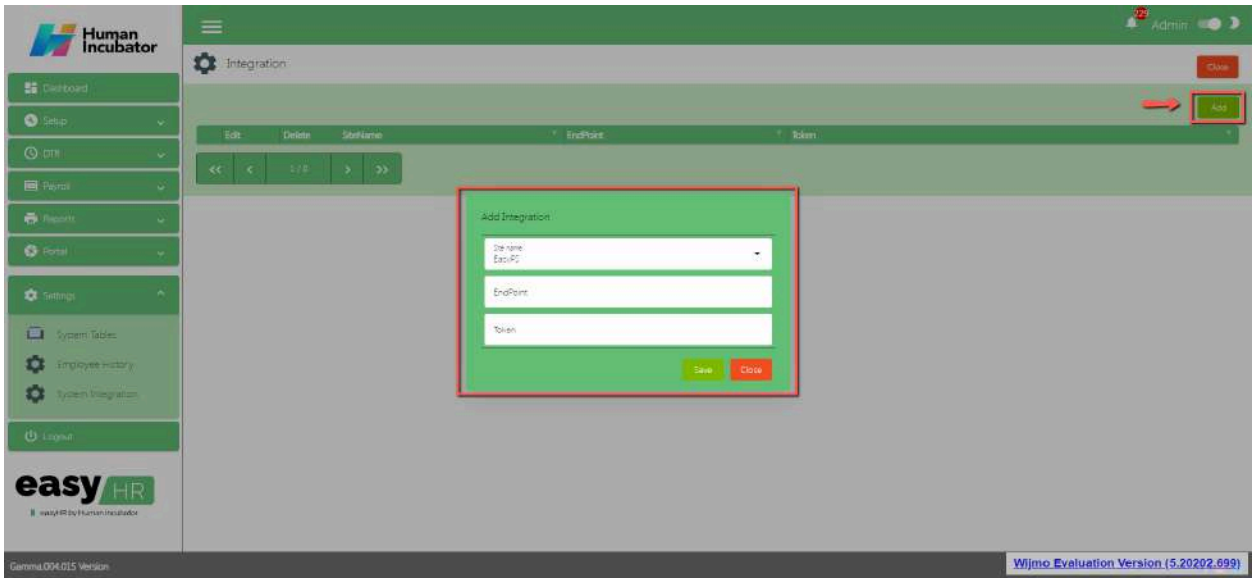
- System Integration is used to integrate to another system like EasyFS.

Integration

- Show the list of integration



- The purpose of the **Add** button is to add integration.
    - Click **Add** button
    - Select Site Name
    - Input EndPoint
    - Input Token
    - Click **Save** button to add in the Integration table list.



Section X: Logout

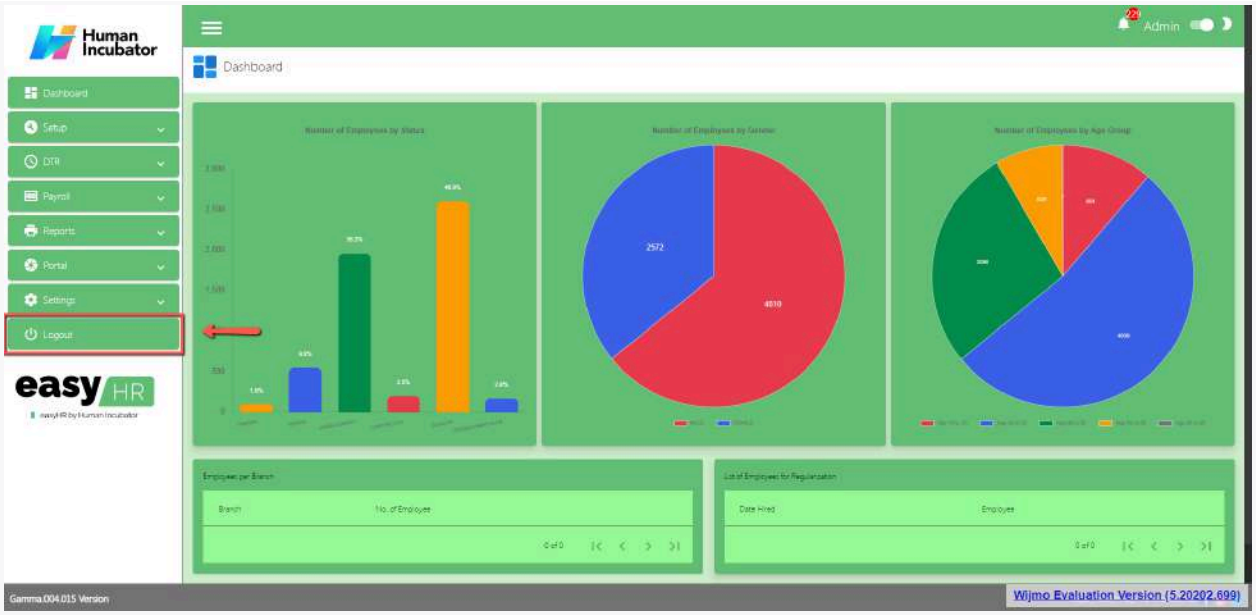
Logout

Overview

- Logout is used to terminate your current session and disconnect from the system, which can be important for security and privacy reasons.

Logout

- Click the **Logout** button to disconnect the account.


Human Incubator
Dashboard
Setup
DTR
Payroll
Reports
Portal
Settings
Logout
easy HR
easyHR by Human Incubator
Admin
Dashboard
Number of Employees by Status
Number of Employees by Gender
Number of Employees by Age Group
2572
4010
Employees per Branch
Branch
No. of Employee
List of Employees for Regularization
Date Hired
Employee
Gamma.004.015 Version
Wijmo Evaluation Version (5.20202.699)

easy HR
easyHR by Human Incubator
Username
Password
Forgot password?
Login
Click here to view privacy policy