



HRMAGIC USERMANUAL 1.0



Date	Author	Version	Notes
12 th Jan 2016	Peter Otandeka	1 st draft	
14 th Jan 2017	Peter Otandeka	2 nd draft	



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Introduction

Congratulations on using HRMagic. It is our belief that you will find this product useful to you and the organisation. It has been designed to be easy to use without even consulting a manual. It is mainly to help in training users.

Note that it may be a bit long but take your time and read through. We shall be making updates to this manual as more features and upgrades to HRMagic are done.

Note: We would be lying if we told you that the manual contains each and every detail about HRMagic. Browse our demo (<http://demo.hrmagic.ug/>) and go through the system. Whatever we add to the main system is added to the demo branch together with test data. Go have some fun. Report to us in case you discover a few bugs that require our immediate attention.

System Access

A username and password are required to access the system. These are given to you by your account administrator.

New Account

If it's your first time and you would like to create an account for your organisation, go to <https://hrmagic.ug/> and sign up. Immediately, the HRMagic management team will receive a notification and approve your request if you have fulfilled the requirements.

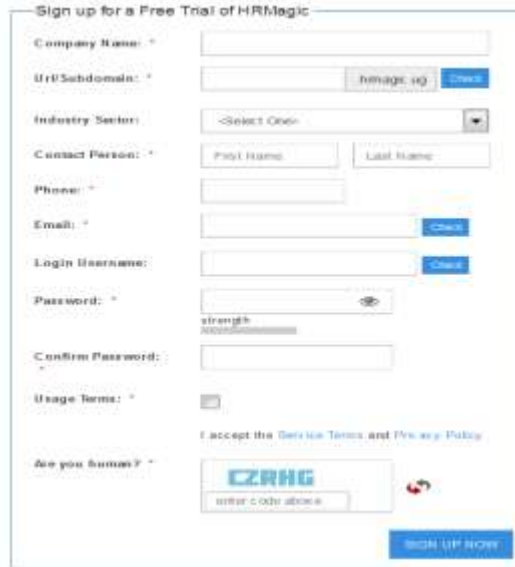


Figure 1 HRMagic Signup Page

Your new account is a trial that is valid for 30 days and allows you to only add 5 employee profiles. If you have paid up, then your account will be valid for that period and gives you access to number of employees that you have paid for.

Take some time to read our terms and conditions and privacy policy.

User Roles

HRMagic has two major user roles:-

- Company Administrator – this is the admin account for whoever will managing the company. This user has overall rights to manage the instance. We advise that such rights should be given to staff at senior managerial level within the organisation so that they can be held responsible in case of any issue.
- Employee Profile - this is a basic employee access account. It gives an employee rights to perform a few functions such as:-
 1. View your payments and payslips
 2. Access your profile and change a few bio details.
 3. Request for leave
 4. Request for allowances
 5. Submit your work orders
 6. Submit a complaint or help request to admin



HRMagic also has company-wide user defined roles that can be configured with help from the systems administrator.

Note that an admin is also an employee with specific rights and access. These rights can be revoked and given to another person.

Account Management

An account is inactive until activated. Once it is activated, it can be deactivated, locked or deleted completely. Once an account is removed from the system, its contents cannot be recovered.

Password Recovery

If you have forgotten your password, go to the login page and click on the recovery link. All you will be required is to enter your valid email address and the system will send you a recovery link to your email. In case due to technical failure the recovery email is not received, contact your system administrator who will send you a link to allow you generate a new password.

Dashboard

The dashboard is the main page that you land on as soon as you log in. It will allow you to access the main and side menus as well as the most frequently accessed icons, links and modules. These features include but not limited to:-

- **Main Menu** – gives you access to the main bar (Employees, Timesheets, Leave, Finance, Reports and Admin) and its sub menus.
- **Check-in and Check-out** - an employee can check in and check out using this feature. Note that it picks system time so an employee can't easily change it.
- **Actions Required Frame** – this is a useful panel for the administrator. Any event or action that needs their approval or notice is on that panel. This includes
- **Essential Statistics** – this table shows the number of timesheet hours pending and approved, number of employees, number of departments and positions among other stats.
- **Who is at work today?** – displays which employee(s) has checked in for that day.
- **Who is on leave?** – displays which employee(s) are on leave and how many days are left on a daily. Makes it easier to check who is on leave without having to go to the module itself.



- **Latest Notifications** – shows the latest inbox messages from the admin and employees and any other system notifications.
- **Message Center** – displays the inbox messages, and also allows you to send out SMS and emails to staff with accounts within the system.
- **Quick Links** – these are short cuts to the frequently used links and features of HRMagic. It is for easier and quick navigation throughout HRMagic.
- **Today's Summary** – shows the user's summary or activity of the day.
- **Leave Summary** - shows the leave days accrued and also pending.
- **Date and Time** – today's date and time.
- **Who is logged in** – your login credentials.

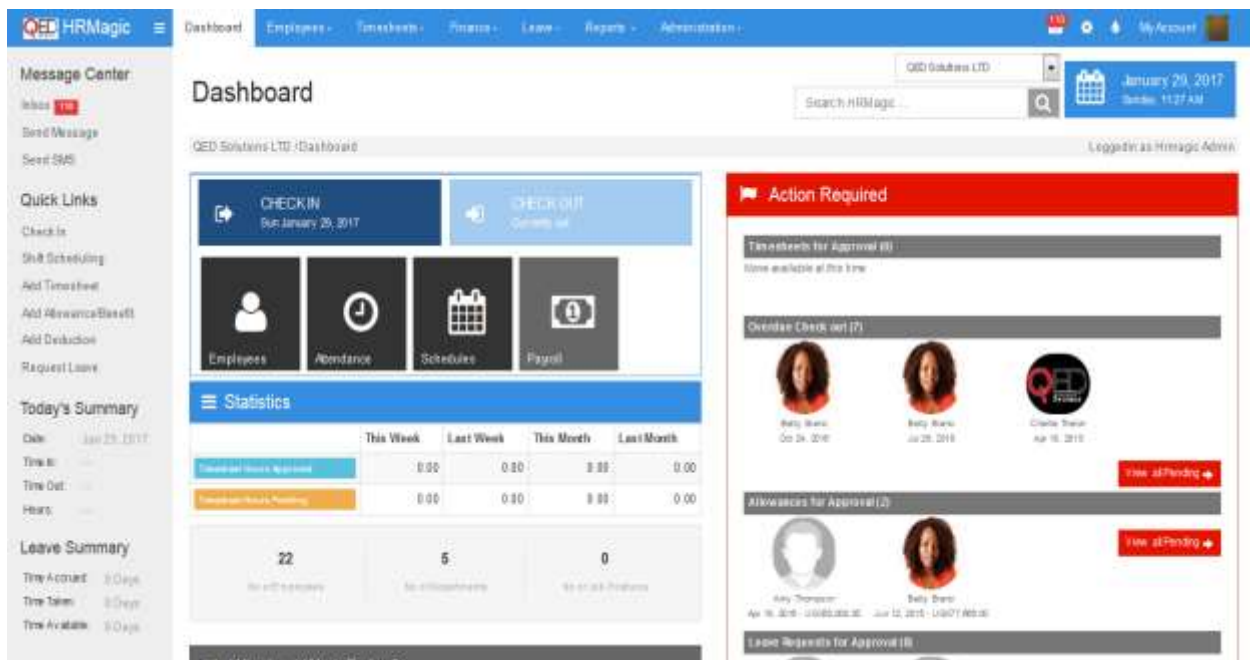


Figure 2 Showing HRMagic main page

Administration

This module is only for staff with administrative privileges. It is where all the setup, configuration and management of the system by admins and super admins takes place from. Immediately a company gets an account, they will be required to go to this module and properly set up the company parameters. Without it, they will be required to go back and forth. These include:-



- a) **Branches** – set up company branches all over the world
- b) **Departments** – set up company departments and the respective sub departments
- c) **Job Positions** - add all the job roles within the organisation
- d) **Contract Types** – enter the various types of contracts available e.g. full time employee, permanent, temporary, consultant, probation etc etc.
- e) **Work Shifts** – set up the different shifts for the different categories of employees. e.g. normal working shift (0800 – 1700) or early morning shift (0100 – 0700hrs). Note that every employee must belong to a shift otherwise they will not be able to check in. An employee is allowed to check in one hour (can be set) before the set time and one after.
- f) **Allowance categories** – add allowances allowed and given out in the company.
- g) **Commission services** – The work orders module depends on the parameters you set in this table. It is where you define what the commission services and the corresponding unit price. It is these services that you must select from to process a work order.
- h) **Leave categories** – set the types of leave categories and the corresponding number of days or hours. Each employee is allocated a corresponding number of leave days per category from which accrued leave days are deducted.
- i) **Document Library** - store all HR related documents in the system. Share with employees what is specific to them. You can also set the preference to private or public. Public documents are seen by all staff. At the moment we accept excel, word and pdf documents. Those who need to store heavy files will be required to pay for extra space.
- j) **Company Settings** – add all the company-wide related information into the system. This include company contact info, tax percentages, working days, accounting period, check-in time and delays, working hours, allowed IP addresses/subnets, leave settings, currency, and company logo among other features.

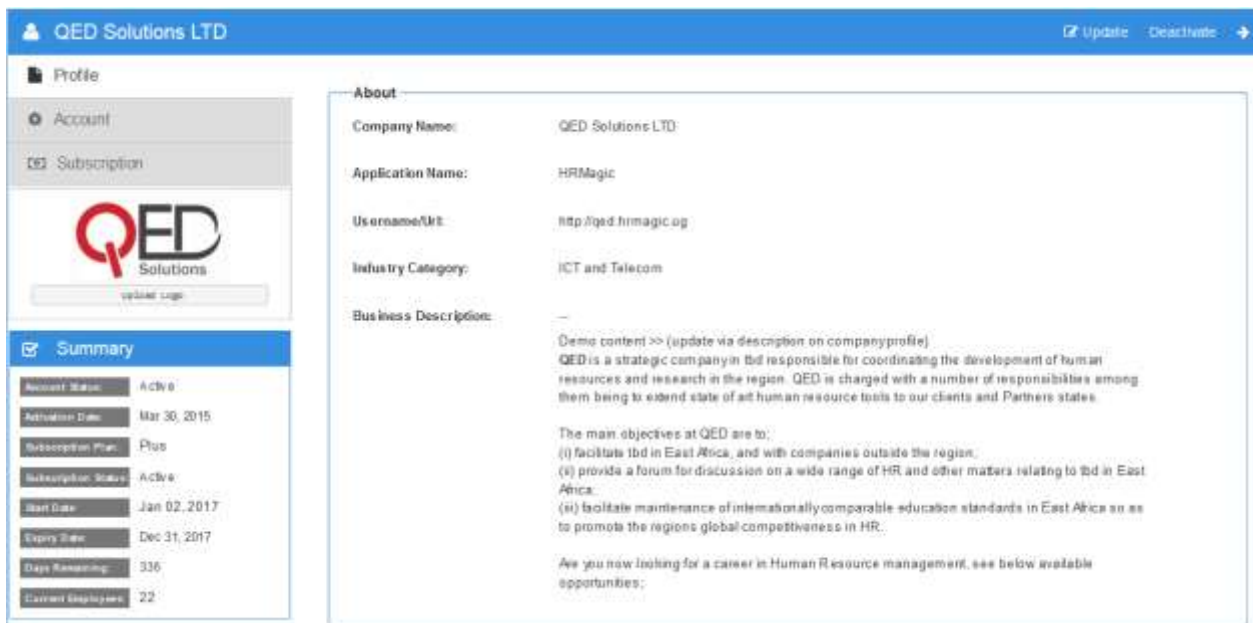


Figure 3 Configure Company Settings

Employee Profiles

Having accurate and complete data of an employee is very critical for the running of this system otherwise you will end generating an incomplete payroll with wrong figures, wrong leave records, wrong timesheets and even sending the wrong info to the banks and tax bodies. HRMagic puts much emphasis in ensuring that we collect the right data.

New Employee

Setting up a new employee profile is done in four steps:-

- **Bio data** – we start by capturing an employee’s personal details. These include names, gender, age, nationality, marital status, personal address, email, telephone and next of kin details among fields to be filled.
- **Employment Details** – complete the set up by adding the employee’s department, branch, position, contract type, supervisor, contract start and end date, employee and national ID, banking details, and CV related information.

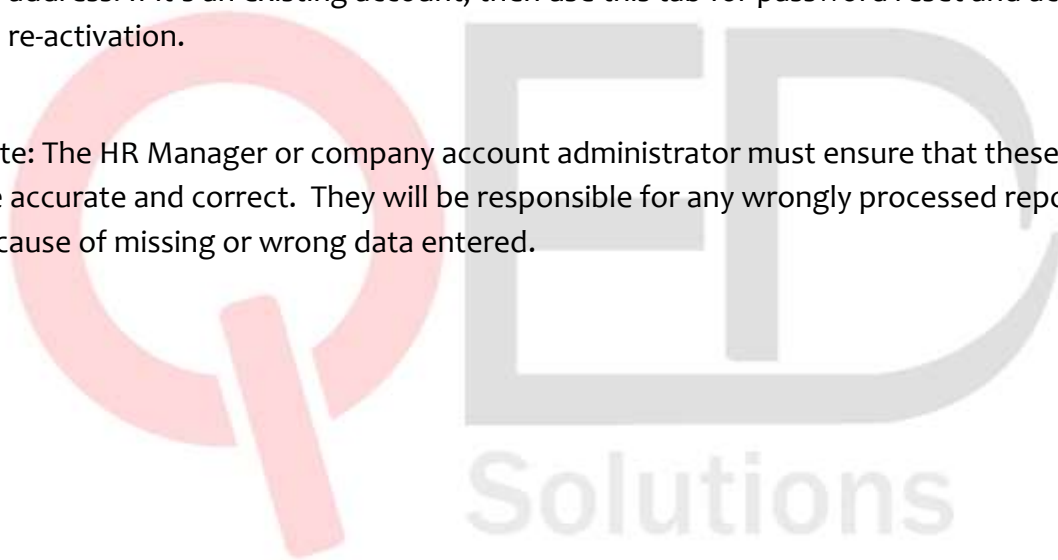
The system allows you (admin) to configure attendance/working days for an employee. Note that the payroll for those are paid hourly/daily is dependent on the

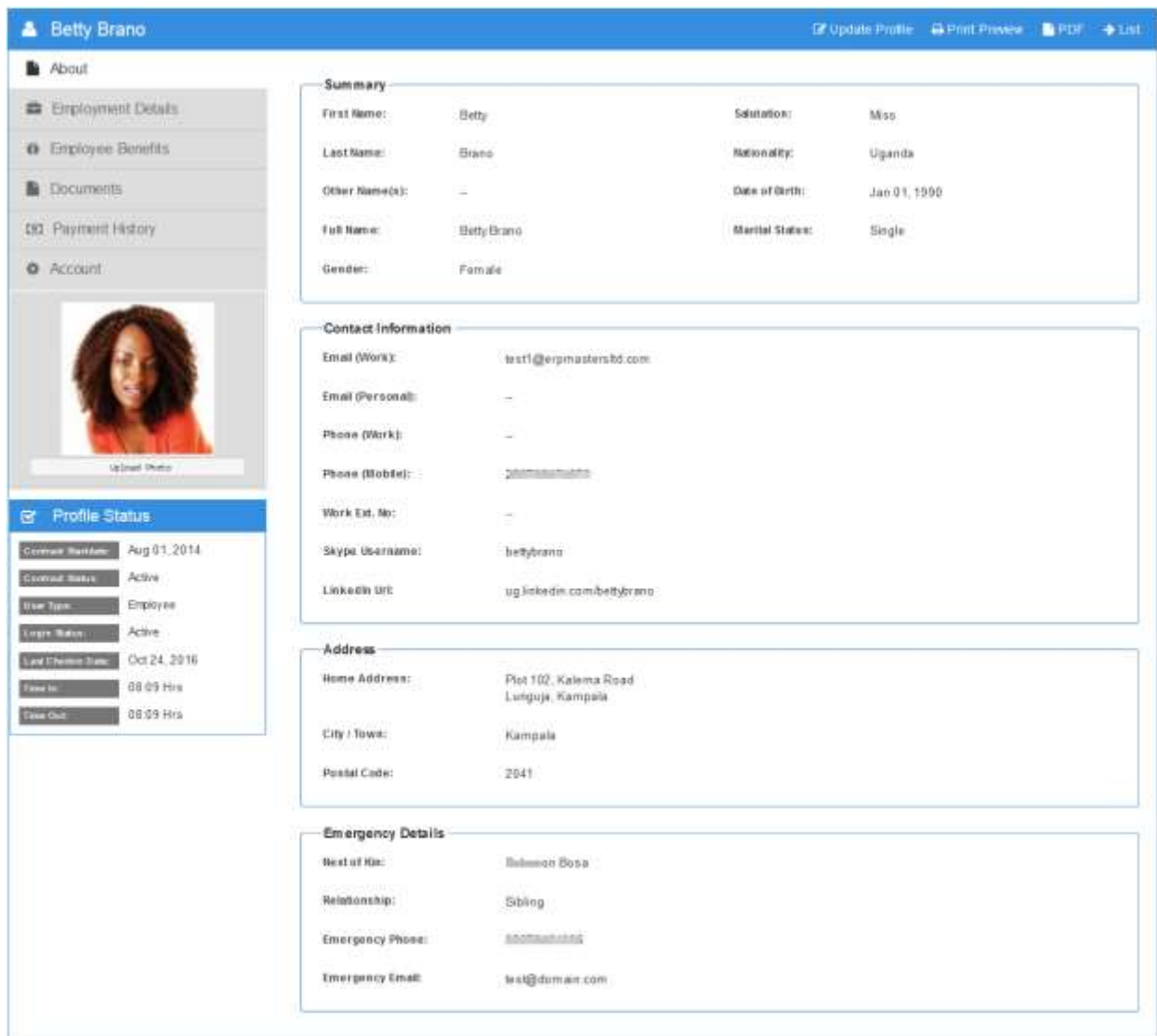


days configured. Leave days and hours accrued are also calculated based on also the set working days.

- **Employee Benefits** - this form basically entails setting up what the employee will earn and also pay out as taxes. This includes but not limited to basic salary, nssf (yes or no), paye (yes or no), withholding tax (yes or no), allowances (car, medical, data, overtime etc etc), and leave benefits.
- **Account Set Up** – this is final set up after going through the above 3 steps. Give an employee access by setting for them an account (username and default password). If it's a new account, the system will email an activation link to the employee's email address. If it's an existing account, then use this tab for password reset and account re-activation.

Note: The HR Manager or company account administrator must ensure that these details are accurate and correct. They will be responsible for any wrongly processed reports because of missing or wrong data entered.





The screenshot displays a user profile for Betty Brano. The interface includes a top navigation bar with options like 'Update Profile', 'Print Preview', and 'PDF'. A left sidebar contains menu items such as 'About', 'Employment Details', 'Employee Benefits', 'Documents', 'Payment History', and 'Account'. The main content area is divided into several sections:

- Summary:** A table of personal details including First Name (Betty), Last Name (Brano), Other Name(s) (-), Full Name (Betty Brano), Gender (Female), Salutation (Miss), Nationality (Uganda), Date of Birth (Jan 01, 1990), and Marital Status (Single).
- Contact Information:** A table of communication details including Email (Work) (test1@erpmastersbd.com), Email (Personal) (-), Phone (Work) (-), Phone (Mobile) (2007040000000000), Work Ext. No. (-), Skype Username (bettybrano), and LinkedIn URL (ug.linkedin.com/bettybrano).
- Address:** A table of location details including Home Address (Plot 102, Kalema Road, Lutgija, Kampala), City / Town (Kampala), and Postal Code (2041).
- Emergency Details:** A table of emergency contact information including Next of Kin (Babson Bosa), Relationship (Sibling), Emergency Phone (2007040000000000), and Emergency Email (test@domain.com).
- Profile Status:** A table of operational status including Contract Start Date (Aug 01, 2014), Contract Status (Active), User Type (Employee), Login Status (Active), Last Update Date (Oct 24, 2016), Time In (08:09 Hrs), and Time Out (08:09 Hrs).

Figure 4 Showing a Full Employee Profile

Recruitment

This module is for companies that intend to carry out recruitment internally or externally at any given time. This is split into the following sub-modules:-

- a) **Jobs Board** - this is where you find all the jobs i.e. those published, archived (expired or not put up) and still in draft form.



The first step is to add a job position. First and foremost, start by defining the title, category, job code, duty station, description, responsibilities, skills required, salary range, industry, experience, and education level among other fields. Secondly add the application form, then later the hiring team and finally set how long you intend to have the job up and running i.e. date of publishing and expiry date. Once you have successfully filled in these fields, then you can choose to publish the job or leave it until you are ready.

b) Careers Page

This is the page that is viewed externally by those who intend to apply for the published jobs. It basically shows background info about the company publishing the jobs, introductory notes about the current recruitment and then lists the jobs. All an applicant needs to do is click on the job, view the job details and then determine if they are ready to apply or not. If they are ready, then they will be required to click on the application form and start filling in the fields one by one.

Note that the application form is a wizard that the applicant must fill in religiously and then submit after completion. Note that an application once submitted is irreversible or can't be edited again. So applicants are encouraged to be carefully while filling in the form.

c) View Candidates

This is where you view (for recruiters) all the candidates who have applied for each of the jobs published. Against each job, you will see a list of all candidates. Click on the candidates name and the system will show you the applicant's details. Use that to see who qualifies to go to the next stage or not.

Note that an applicant's data deleted can't be recovered. Be careful with what you do with that data.

d) Recruitment Process/Stages

This is the main course of the meal. We so far have 7 stages inbuilt but these can be changed based on your preference. These are:-

- **Sourced** – section for CVs collected internally or rather added manually.
- **Applied** - contains applications entered by applicants online.
- **Shortlisted** – After the recruiting team has sieved through the applications in the Sourced and Applied sections, the selected applications are moved to this section.
- **Interview** – all candidates due for interviews are moved to this section.



- **Assessment** – successfully interviewed applicants who are to undergo further assessments are added to this section.
- **Offer** – once candidates have passed the previous stages, they are given offers.
- **Hired** - candidates who finally accept the offer on the table are hired. Note that once a candidate is hired, they will be automatically added into HRMagic as an employee pending account activation.

Note: Any of the stages from shortlisted can be skipped depending on your company HR recruitment policy.

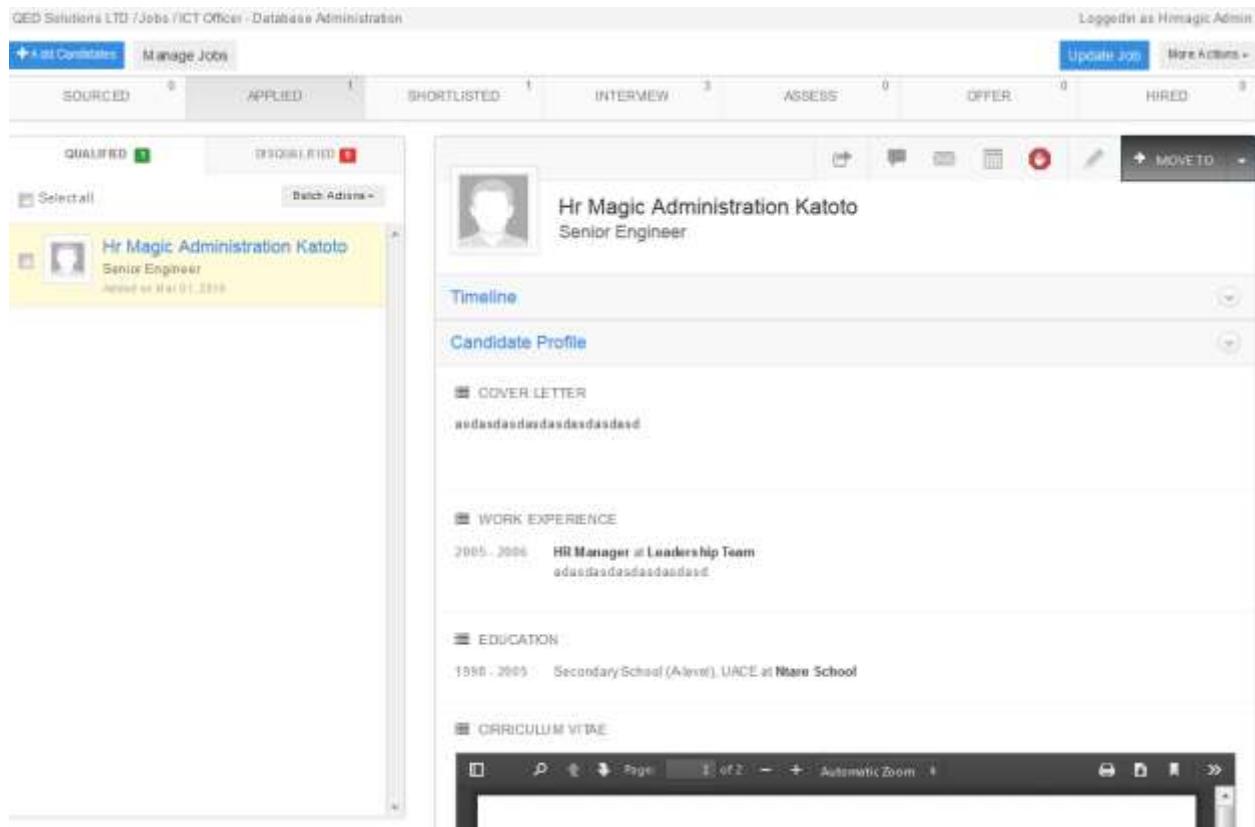


Figure 5 Showing the main HR recruitment stages and the applicant's profile.



Timesheet Management

Time is a valuable asset to a person and an organisation. It must be utilized in the most efficient way. HRMagic assists to track time utilized by the employee while in your office or organisation. Our timesheet module consists of the following features:-

- **Check In and Check Out** – an employee can check in at the beginning of the shift and clock out when the shift is done. The system records the time at the start of the shift and at the end. Note that an employee can't change these records at all. Also an employee must belong to a work shift before they can be able to check in. An employee is allowed to check 30 minutes (or more depending on what's in the settings) before scheduled time. However the system won't add that time to their timesheet. A supervisor has to approve these timesheets once submitted before they can be considered for payroll generation.

Note that for timesheets to be considered for the payroll, the admin has to make sure that the salary payment mode for the employee is set to hourly, and an hourly wage is added.

The system can't allow check in advance or past. The employee must then request for overtime if it's past.

- **Add Timesheet** - an employee whose time hasn't been considered can apply for it through this form. Once approved, it will be added to their profile.
- **Timesheet History and Approvals** - lists all pending and approved timesheets. The supervisor can be able to carry out bulk approvals or rejections.
- **Timesheet Calendar** - view the hours accumulated for all your staff on a daily, weekly and monthly view. This gives you the HR admin a snapshot of how an employee has performed over a period of time. Note that this calendar shows data in real time.

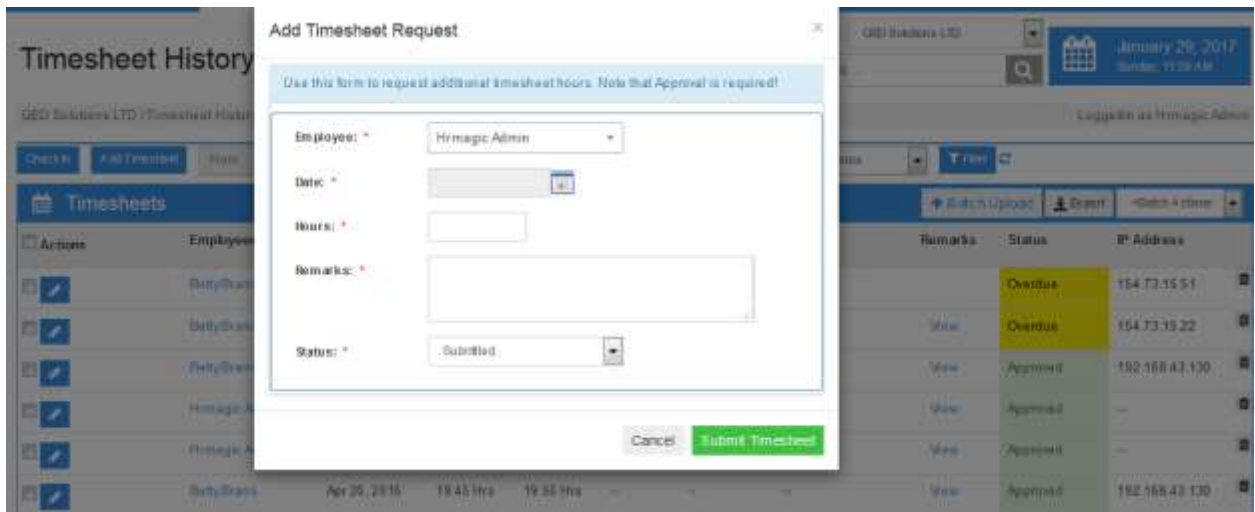


Figure 6 Request for Extra Time/Overtime

Finance

This is one of the important modules in the entire system. Why? Because everybody loves money. It's the module that handles anything related monetary within the system. It's also the module with a lot of formulae. The HRMagic admin must be careful while carrying out anything with this module. It consists of the following sub-modules:-

- **Allowances and Deductions** – Employees can use this feature to request for allowances and check if their allowances have been approved or not. Supervisors can be able to add deductions to an employee as well manage allowances. Note that approved allowances are added to the payroll.

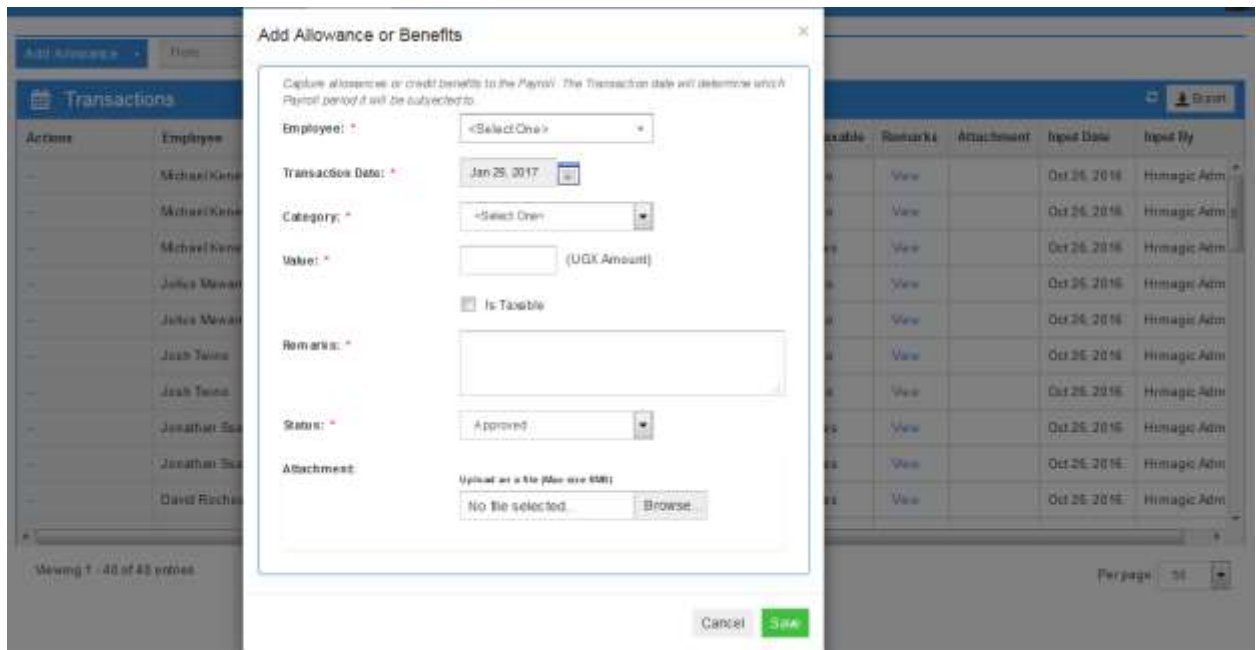
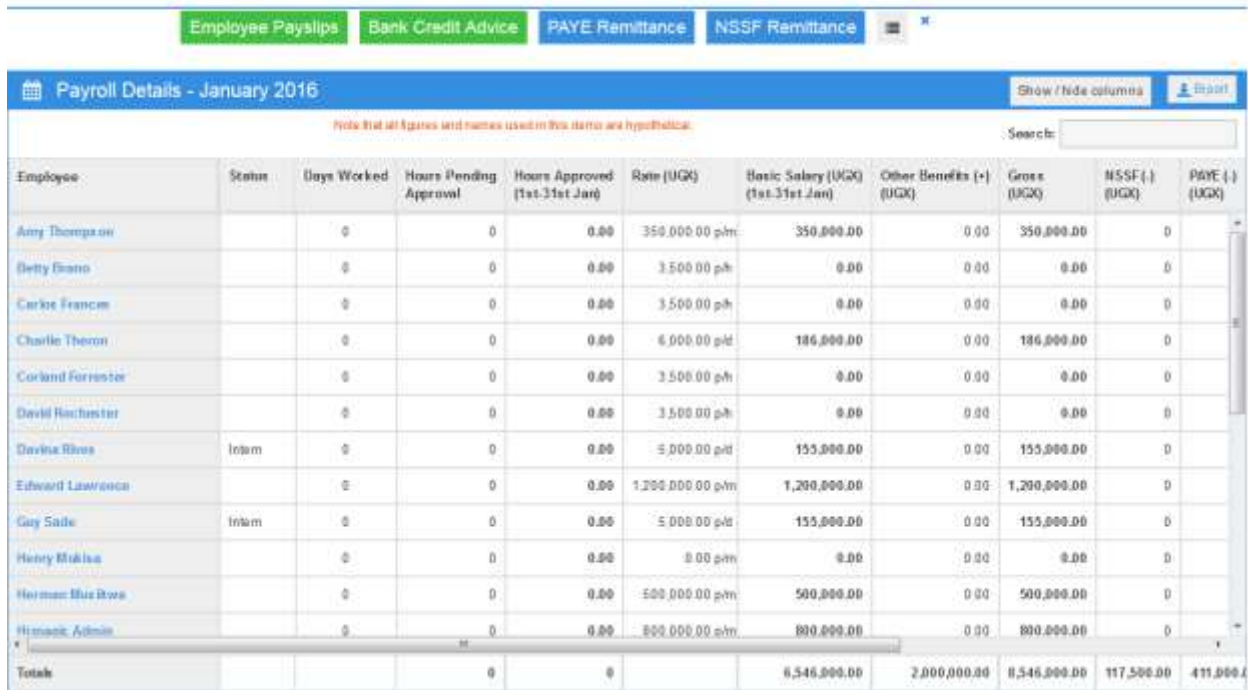


Figure 7 Request for Allowances

- **Commissions** – Use this module to manage work orders. Consultants (CSOs) can submit completed work orders with request for payment. Supervisors can then login and approve/reject submitted orders. The different commissioned services, rates and currencies are set in the Administration module.
- **Salary Loans/Advances** – This is basically used by supervisors and administrators to track salary advance requests by employees. This includes setting the interest rate, principal amount, repayment period, and monthly instalments among other features. You can also set if the monthly instalment is to be deducted from the salary or not.
- **Payroll** - This is a list of company's employees and the list of wages, allowances, and salaries to be paid and the taxes deducted.
To generate a payroll, select the payroll type (daily, weekly, fortnightly, monthly) and then hit the generate button. A draft payroll will be generated. You are advised to continue working with draft until you are sure it is accurate and up to what you require. For example if you increased an employee's salary and wish that it reflects on the current payroll, go to the draft and click on the update button for the changes to reflect.

The “Mark as Completed” button should only be clicked if you are on the final draft and have no further changes to add. There is no turning back with that blue button. This action completes the payroll, locks it, generates PAYE and NSSF reports and sends out payslips via email to all employees.



Employee	Status	Days Worked	Hours Pending Approval	Hours Approved (1st-31st Jan)	Rate (UGX)	Basic Salary (UGX) (1st-31st Jan)	Other Benefits (+) (UGX)	Gross (UGX)	NSSF (-) (UGX)	PAYE (-) (UGX)
Amy Thompson		0	0	0.00	350,000.00 p/m	350,000.00	0.00	350,000.00	0	
Betty Brano		0	0	0.00	3,500.00 p/h	0.00	0.00	0.00	0	
Carole Francis		0	0	0.00	3,500.00 p/h	0.00	0.00	0.00	0	
Charlie Theron		0	0	0.00	6,000.00 p/d	186,000.00	0.00	186,000.00	0	
Corland Forrester		0	0	0.00	3,500.00 p/h	0.00	0.00	0.00	0	
David Rochester		0	0	0.00	3,500.00 p/h	0.00	0.00	0.00	0	
Davise Rivers	Intern	0	0	0.00	5,000.00 p/d	155,000.00	0.00	155,000.00	0	
Edward Lawrence		0	0	0.00	1,200,000.00 p/m	1,200,000.00	0.00	1,200,000.00	0	
Guy Saffe	Intern	0	0	0.00	5,000.00 p/d	155,000.00	0.00	155,000.00	0	
Henry Mukisa		0	0	0.00	0.00 p/m	0.00	0.00	0.00	0	
Herman Muz Bwa		0	0	0.00	500,000.00 p/m	500,000.00	0.00	500,000.00	0	
Hermanic Admin		0	0	0.00	800,000.00 p/m	800,000.00	0.00	800,000.00	0	
Totals			0	0		6,546,000.00	2,000,000.00	8,546,000.00	117,500.00	411,000.00

Figure 8 A complete payroll generated by HRMagic

- **Payslips**

You can access current and old payslips from this module. Employees can download payslips from their account under Payments or go to Finance/Payslips to access them.

- **Bank Credit Instructions** – access data that you will need to send to the banks i.e. account name, number, bank, bank branch and amount to pay. This report can be extracted and sent together with instructions to your bankers to credit individual accounts.

- **Tax Remittance** – shows you how much tax (PAYE or withholding tax) per employee that will be remitted to the tax bodies. Note that the formulae we use are standard and based on what is published with the social security and tax authorities.



- **NSSF Remittance** - shows you how much the company will contribute for each employee to the social security fund.

Leave

Leave management is crucial for an organisation that has many employees and wishes to schedule and ensure that work continues as normal while some are on leave. Some of the features include:-

- **Leave Applications** – Apply for leave using the form from this feature. Submit the time you intend to be away, when your leave starts and when it will end. The leave time will be taken from leave days/hours accrued, leave time assigned to you by the admin and or time carried forward. Once a leave request is submitted, it will be up to the approvers to approve it before the applicant can go on leave.





Request Leave	
Employee: *	<Select One>
Leave Type: *	Annual Leave
Description:	
Start Date: *	<input type="text"/>
Total Time Accrued:	0 Days
Time Taken:	0 Days
Time Available:	0 Days <i>No time available for type 'Annual Leave'. Contact your Admin/HR to review your Accrual Balance</i>
Time Requested: *	<input type="text"/> <input checked="" type="radio"/> Day(s) <i>Enter time in days (@8 Hours)</i>
End Date: *	<input type="text"/>
Return Date: *	<input type="text"/>
Status: *	Pending
Leave Taken	<input type="checkbox"/> Mark Leave as Taken
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

Figure 9 Leave Request Form

- **Approval Process** – a leave request can have one or many approvers. These approvers can be added onto an employee profile or company-wide in Administration settings. Each of the assigned approvers must approve the leave request for employees they are assigned to. The admin still has rights to override.



- **Leave History** – check out the history of each of the employees’ requests and approved leave over the course of the year.
- **Who is off?** - This is the dashboard panel that shows you who is on leave currently.
- **Calendar**- A color-coded view of the calendar of employees on leave with their leave days taken clearly marked.

Sign Out

You are reminded to sign out every time you are done with HRMagic work. Also lock or sign out of your session in case you are going off your desk. You don’t want someone to eavesdrop on your work if you leave your computer unattended to. HRMagic is automatically set to lock your session if you take long to carry out an activity for some time.

Reports

These are summarized statistical reports for all the existing modules within the system.

Conclusion

We have come to the end of this manual. Thanks for persisting through. By the way, I also don’t like reading manuals but refer to them every time I am stuck. This is our simple guide to navigate the entire system. We shall continuously add onto it to give you an improved experience.

At QED, we believe and know that this solution will turn around the way you have been handling your HR & Payroll in your organisation by increasing on the efficiency and improving on the effectiveness of its functionality.

For more info about QED, visit www.qed.co.ug. Attached is our company profile for your review.

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