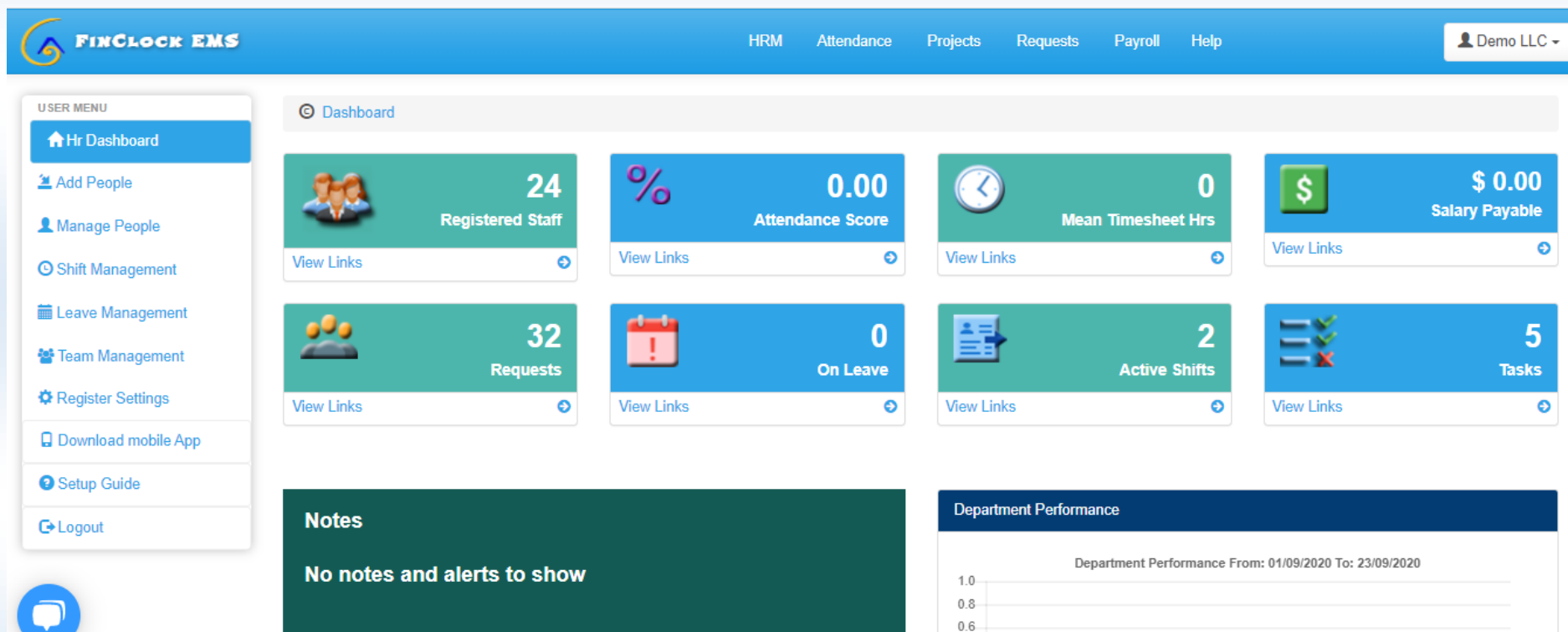# FinClock Guide: Human Resource Management (HRM)

1. **Add or Invite** staff members

2. **Staff Register.** View and manage staff records.

3. **Manage People.** Quick Access menu to Job Categories, Shifts, Leave and Workstations.

4. **Shift Management.** Create, assign and review shifts

5. **Leave Management.** Planner, assign leaves, Company policies and Reports.

1. Adding or Inviting Staff members.

1

Step 1: Add/Invite Staff

Select **Add/invite staff page**, under Add people menu.

2. Add Staff

Step 2: Invite Staff Member

- Fill the person's details: Names, Email, phone No & Post.
- When you Submit, the person gets Email and SMS invite with login email and password.

FinClock EMS

HRM   Attendance   Projects   Requests   Payroll   Help   Demo LLC ▾

USER MENU

- 🏠 Hr Dashboard
- 🔼 Add People
  - **Add/Invite Staff**
  - Staff Register
  - Edit Requests
  - Registration Requests
- 👤 Manage People
- 🕐 Shift Management
- 📅 Leave Management
- 👥 Team Management
- ⚙ Register Settings
- 📱 Download mobile App

👤 Employee List / Invite Staff

Import   Download Demo File

Staff Basic Details

Surname:
Enter Surname

Other Names:
Enter Other Names

Email:
Enter Email

Mobile No: (+,country code,number)
🇺🇸 ▾   Phone Number

Id No/Passport:
Enter Id No/Passport

Work Location Details

Post:
- Select Post -
RMS HQ

3. Staff Register

Step 3: Manage Staff Register

- Click on **Staff register** under Add people menu.
- You will see the details of your staff members.
- To edit details, click on the **edit button** on the right side, next to the person's details.
- To deactivate a person click to uncheck them on the **Active column**.

2. Manage People Menu: (shift, job category, leaves, posts)

1

Step 1: Assign Shifts

Select Assign shift under Manage people menu.

2. Assign or Change Staff Shift

Step 2: Assigning or changing Shift to people

- Select the Person, whose shift you wish to change.
- Then select the shift you wish to assign them
- Then click on the assign shift button.

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USER MENU
- Hr Dashboard
- Add People
- Manage People
- **Assign Shifts**
- Assign Job Category
- Assign Leave
- Assign Workstations
- Approve Transfers
- View Edit History
- Shift Management
- Leave Management
- Team Management

✔ Assign Shift to Staff

Select Post: - All -

Select Shift: - Select Shift -

[Assign Shift] [Close]

100 records per page Search:

	Employee Name	Employee Id	Job Category	Shift Name	Post Name	Country Code	Mobile No	Active	Action
☐	Another Person test	2644112	News Presenter (Inooro FM)	Night shift B (night)	RMS HQ	+254	720001847	☑	Edit
☐	ALI SITI FARIDA	18005	News Editor (Bahari FM)	Night shift B (night)	RMS HQ	+254	705757151	☑	Edit
☐	MCGRATH JAMES DOE	00000001	Driver(s)	Night shift B (night)	RMS HQ	+44	2444215411	☑	Edit
☐	New Staff	211	Credit Control	Morning A (morning)	RMS HQ	+91	9033343534	☑	Edit

3. Manage People Quick Access Menu: (shift, job category, leaves, posts)

1. Job Category

Step 1: Job Category Page

Under Manage people menu, select the **Assign Job category** page.

2. Assign or Change Job Category

Step 2: Changing or assigning new job category

- Job Categories are the actual work group that a person holds.
- You can assign Job category by selecting the person.
- Then, select the job category and click the assign job category button.

4. Leave Management: Assign Leave

1

Step 1: Select Assign leave

Under Manage people menu, select the **Assign Leave** page.

2. Assign Leave

Step 2: Assigning previously added leave to a person

- Click the **Assign Leave** button.
- Select the Person you wish to assign a leave.
- Select leave type, Start and End Date, Comments.
- Select the status as either accepted or scheduled.

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USER MENU
- 🏠 Hr Dashboard
- 👤 Add People
- 👤 Manage People
  - Assign Shifts
  - Assign Job Category
  - **Assign Leave**
  - Assign Workstations
  - Approve Transfers
  - View Edit History
- 🕐 Shift Management
- 📅 Leave Management
  - **Assign Leave**
  - Leave Planner

👤 Employee / Set Leave For Employee

Assign Leave

[10 ▾] records per page　　　　　　　　Search: [_____]

Post Name	Employee Name	Leave Name	From Dt.	To Dt.	Resume Dt.	No of Days	Reason	Action
RMS HQ	ALI SITI FARIDA	Annual	12/02/2020	19/02/2020		8	A normal annual leave	Edit
RMS HQ	ALI SITI FARIDA	Annual	05/11/2019	13/11/2019		9	Test Leave	Edit
RMS HQ	CHOMBO KAREN JENNIS	Annual	28/11/2019	29/11/2019		2	dfgdfgdfgfdg	Edit
RMS HQ	CHOMBO KAREN JENNIS	Annual	24/11/2019	24/11/2019		1	dfgdfgdfgfdg	Edit
RMS HQ	ALI SITI FARIDA	bereavement	15/11/2019	15/11/2019		1	A single day	Edit
RMS HQ	Another Person test	bereavement	27/07/2020	27/07/2020		1	A test one	Edit
RMS HQ	MUCOKI ZEDEKIAH	bereavement	14/11/2019	30/11/2019		17	The employees needs a leave	Edit

Leave Management: Leave Planner

3. Leave Planner

Step 1: Plan Leaves for your staff members.

- Click on the Plus icon to add leave for a given day. The assign leave popup will open, where you can continue with the Simple steps of assigning a leave.
- If you want to assign leave for several days, select the assign leave button on the top right.
- You can see the leave balance for a person, based on the leave policies that you have set.

Leave Management: Leave Policies

4. Add Leave Policies

Step 2: Leave types, Days allowed and payment for leaves.

- Leave policies are the type of leaves in your company. You will also be able to define the days, if the leaves are payable or not.
- Under Leave Policies, Add the Leave type by name, select if the days are payable and the roll over status.
- Then, select the categories that can be assigned the leave policy (to multi-select the categories, press the Shift key)
- When finished, click submit and the leave policy will be available for assignment.

Leave Name	Max No. of Days	Is Payable?	Leave Option	Amount per Day	Allow Rollover	Leave Period	Leave Trading	Active	Action
Annual	12	Non Payable		0	No			Yes	☑	Edit

Leave Management: Add Maximum Leave Days.

5. Add Max Days

Step 1: Set Maximum leave days in an year per job category.

- Select the Job Category
- Add the Maximum Number of leave days per year. Submit when done.
- When you set maximum days, leave balance will be the difference between taken leave days and the maximum leave days.

Leave Reports: Taken, balance and annual leave reports.

User Name	ID	Team Admin	Annual Taken Leave Days	Annual Leave days rolled over	Max Annual Leave Days	Current Annual Leave Days	Approvals
MACHARIA NAOMI WANJIKU	1202	CHOMBO KAREN JENNIS	Medical - 5				0
MUCOKI ZEDEKIAH WARUI	1016	CHOMBO KAREN JENNIS	bereavement - 17				0
ARONI LAWRENCE NYAKUNDI	16016	ALI SITI FARIDA	Medical - 58				0
BONYO JOSEPH TOMAS ODHIAMBO	22027	ALI SITI FARIDA	Sick Leave - 1 Medical - 2				0
ALI SITI FARIDA	18005		bereavement - 1 Annual - 1				0
Another Person test	2644112		Medical - 3				0
CHOMBO KAREN JENNIS	9096		Medical - 1				0

- **Taken Leaves report.** A summary of the leaves that have been taken for that year.
- **Leave Balance Report.** A report of leave days that are still not taken that year.
- **Annual Leave reports.** A report of the leaves that have been assigned for the whole year, showing the types, balances and rolled over days.