NEXAPEOPLE

# Handbook

A plain-English guide to what each module does and how it works.

HRIS · Medium-depth feature handbook · 2026 Edition

## About this handbook

A medium-depth guide to the NexaPeople HR system. For each module it explains what it is, who uses it, and how each feature works. For full click-by-click steps, see the complete **User Guide**.

# Contents

Desk Management
Settings
The Generic "Others" Module Engine

# Getting Started & Access

## Signing In & the Dashboard

**What it is:** The login screen is the entry point to NexaPeople.

**Who uses it:** Every user — employees, HR staff, managers, org owners, and the platform super admin — signs in through the same login screen.

- **Signing In** — NexaPeople uses email-and-password authentication. When you submit your credentials, the server validates them, checks that your account is active and your linked employee record is not terminated, and then issues a short-lived access token plus a refresh token.
- **The Home Dashboard** — The dashboard you see after login is filtered by your role. Employees see a personal self-service view.

## Roles, Users & Permissions

**What it is:** NexaPeople controls what each person can see and do through a combination of a role tier (a broad access category) and a Role Template (a fine-grained permission matrix that can be customised per organisation).

**Who uses it:** Org owners and admins manage users and assign Role Templates. HR managers assign templates when adding employees. Employees are affected but do not configure their own permissions.

- **Role Tiers** — Every account has one of the following role tiers, set at account creation and changeable by an owner or admin:
- **Role Templates** — Role Templates are named permission sets stored per organisation. Each template holds a flat list of permission keys in the format `Module::Form::Action` (for example, `Leave::Leave Request::Add`).
- **Managing Org Users** — The Users page (owner/admin-only) lets org administrators create stand-alone login accounts that are not tied to the Add Employee flow — useful for admins who may not appear in the employee list. Role can be set to `admin`, `hr_manager`, or `employee` (owners and super admins cannot be created here).

## Employee Self-Service (ESS) vs HR View

**What it is:** NexaPeople shows different navigation and page content depending on whether the signed-in user is an employee or an HR-tier user.

**Who uses it:** All users — this is an automatic behaviour, not a setting you configure.

- **What Employees See** — Employees are routed to a self-service surface. The navigation contains only modules that apply to the individual: their personal attendance record, leave requests, payroll slips and salary requests, and a limited Employees section for submitting an Info Request, Resignation, or Suggestion.
- **What HR / Admins See** — HR managers, owners, and admins see the full operational rail for every module. Within each module (Attendance, Leave, Payroll, Employees, etc.) a left-side navigation rail lists all sub-sections — management grids, approval queues, settings tabs, and report links — that are hidden from employees.
- **How Extra HR Access Can Be Granted to an Employee** — In rare cases an employee may need to act on specific HR-side forms (for example, approving attendance amendments). Rather than promoting them to HR tier, a custom Role Template can grant them selected HR permissions.

## Organizations & Multi-Tenancy

**What it is:** NexaPeople is a multi-tenant platform.

**Who uses it:** Organisation owners and the platform super admin interact with these features. Regular employees and HR staff are simply members of their organisation and do not see or configure tenancy settings.

- **How Tenant Isolation Works** — Every API call on the server derives the organisation identity from the signed-in user's authentication token — the client never passes an organisation ID that the server trusts. All database queries are filtered to that organisation.
- **Self-Signup (Creating a New Organisation)** — Any person can register a brand-new organisation by completing the self-signup form. The system creates the organisation, a default set of Role Templates, an Organization Settings record, and makes the registrant the organisation's Owner (they are also created as an Employee record so they appear in employee lists and dropdowns).
- **Super-Admin Organisation Provisioning** — The platform super admin can create organisations on behalf of customers without going through the public signup form. From the super-admin-only **Organizations** page, the super admin fills in the organisation name plus the owner's details (name, email, password).

## Notifications

**What it is:** NexaPeople's notification system alerts users when something needs their attention — an ESS request is waiting for approval, a request they submitted has been approved or rejected, or a holiday has been added to the calendar.

**Who uses it:** All roles receive notifications relevant to them. Employees receive outcome notifications on their own requests. HR managers and approvers receive notifications when new requests are submitted.

- **The Notification Bell** — A bell icon in the top header bar shows a badge with the count of unread notifications. Clicking the bell opens a dropdown listing the most recent notifications with their title, a short description, and a relative timestamp ("today", "yesterday", "3 days ago").
- **The Notifications Page** — The full notification history is available on a dedicated page, accessible from the "See All" link at the bottom of the bell dropdown. The page lists every notification addressed to you, in reverse chronological order.
- **How Notifications Are Created** — Notifications are generated automatically by the system at specific trigger points — you do not create them manually. The main triggers are:

## Approvals Workflow

**What it is:** Many actions in NexaPeople follow an approval workflow: an employee submits a request, the request is routed to an approver, and the approver accepts or rejects it.

**Who uses it:** Employees submit requests; HR managers, admins, and designated approvers act on them. A specific named employee can also be designated as an approver for a particular request type — in that case the system allows that employee to approve requests assigned to them even though their role tier is Employee.

- **How an ESS Request Is Submitted** — Employees submit requests from their self-service pages. On submission the system creates a request record with status "Pending", raises a notification to all approver-tier users in the organisation, and shows the request in the employee's own request list with a "Pending" badge.
- **How HR / Approvers Act on Requests** — When an approver receives a notification, clicking it navigates directly to the relevant module page and the correct tab — for example, an attendance amendment notification opens the Attendance module at the "Attendance Request" tab, where all pending requests are listed alongside Approve and Reject action buttons. The approver does not need to search; the deep link places them in the right context.

- **Approval Routing Configuration —** Each request type can be configured with an approval routing rule under the module's Settings section. Options include Auto approval, a single approver level, multi-level approval chains, and selection of whether the approver is any HR-tier user, a designated manager, or a specific named employee.

# People

## Employees

**What it is:** The Employees module is the central record of every person in your organization — their personal details, job assignment, login access, and role permissions.

**Who uses it:** HR Managers and Owners use all eleven navigation items. Regular employees see only three self-service items (Info Request, Resignation, and Suggestions).

- **Adding a New Employee** — Adding an employee is a three-step wizard. Step 1 (General Information) captures identity and job placement.
- **Editing an Employee Record** — Any of the three form steps can be reopened for editing after the employee has been created. The row action menu in the Employee List gives direct shortcuts to the main form, the Additional Information tab, and a password reset dialog.
- **The Employee List** — The list is a filterable, paginated grid showing every active employee by default. Each row shows the employee's code, punch code, name, CNIC/Emirates ID, station, department, designation, joining date, employment type, and role template.
- **Managing Employee Roles and Permissions** — The **Employee Role** tab lets HR assign a role template (such as ESS, MSS, System Admin, or Management Access) to an employee and fine-tune which module forms they can access. Permissions are organized into 24 module accordions (Attendance, Leave, Payroll, Employee, Reports, etc.), each listing specific forms with Add/View/Update/Delete column checkboxes.

**What it is:** Employees log in and see a simplified three-item left rail under Employees.

**Who uses it:** Employees only. HR sees the full eleven-item rail instead.

- **Employee Self-Service (for Employees)** — An employee fills a four-tab form (General / Additional / Company / Documents) requesting changes to their own profile. HR reviews and approves or rejects the request.
- **Bulk Department Assignment (Amend Employee Dept)** — HR can reassign the department of multiple employees in a single save, without opening each record individually.

## Organization

**What it is:** The Organization module is the administrative backbone of NexaPeople.

**Who uses it:** HR Managers, Owners, and Admins. Regular employees do not have access to this module.

**What it is:** The master list of departments in your company.

**Who uses it:** HR/Admin.

- **Departments** — Departments are maintained in a searchable grid. Each department has a name, a code, a department head, and a description.

**What it is:** Company-wide announcements that can be targeted to specific groups of employees by station, department, employee group, designation, or employment status.

**Who uses it:** HR/Admin creates announcements; all targeted employees can view them.

- **Announcements** — Each announcement has a display date range, an announcement type, audience targeting fields, and a rich detail text. The grid lists all announcements sorted newest-first.

**What it is:** A tool to create employee polls with custom response options, targeted to a specific audience.

**Who uses it:** HR/Admin creates polls; employees respond through their dashboard.

- **Polls** — A poll has a title, a display date range, an audience definition, and two or more answer options. Options can be added dynamically.

**What it is:** The official company calendar of public and special holidays.

**Who uses it:** HR/Admin.

- **Gazetted Holidays** — Each holiday has a title, a date, audience targeting fields, a Special Holiday flag (distinguishing special closures from standard public holidays), and an optional description.

**What it is:** A register of company projects, each with budget, timeline, responsible people, and a list of assigned employees with hourly rates.

**Who uses it:** HR/Admin.

- **Projects** — Each project record stores the project name, budget, start and end dates, project manager, project coordinator, customer, station, department, description, and a list of employee-rate line items. The project list shows budget, employee count, manager, coordinator, and project mode (Open/Closed).

**What it is:** A task register linked to projects, with team-member assignments and lead designation.

**Who uses it:** HR/Admin.

- **Tasks** — Each task belongs to a project and has a station, department, description, and a list of assigned employees each flagged as Included/Excluded and optionally as Task Lead.

**What it is:** The master data hub for 36 types of reference values used throughout the application — including Employee Groups, Designations, Stations, Banks, Job Titles, Departments (Sub-Departments), Exit Types, Resignation Types, Countries, Provinces, Cities, and more.

**Who uses it:** HR/Admin.

- **Constants (Master Data)** — The Constants page has a searchable left list of all 36 constant types. Selecting a type shows its records on the right.

**What it is:** A per-employee matrix that controls whether each employee is permitted to log in or record attendance via mobile device, and two-factor authentication options.

**Who uses it:** HR/Admin.

- **Geo-Location Settings** — All active employees are shown in a table. Each row has toggle switches for Login permission, Attendance via IP, and Mobile ID options, plus fields for IP address and Mobile ID values.

**What it is:** A mechanism to lock a payroll period for specific employees.

**Who uses it:** HR/Admin (payroll staff).

- **Month Close** — HR specifies filtering criteria (station, department, employee group, payroll setup, individual employee, payslip period, month, and year). The system generates one record per matching active employee.

**What it is:** Similar to Month Close but at the daily level.

**Who uses it:** HR/Admin (payroll staff).

- **Day Close**

**What it is:** An audit trail of user activity across the system.

**Who uses it:** HR/Admin.

- **System Logs** — The System Logs page has two sub-tabs: Data Logs (individual action records) and User Last Login (the most recent login per employee). A 14-field filter panel lets you narrow results by station, department, employee group, employee, IP address, module, log type, employee code, date range, and screen resolution.

**What it is:** The master configuration page for your organization.

**Who uses it:** Owners and Admins only.

- **Organization Settings** — 71 toggles and dropdowns organized into six accordions — Attendance (19 settings), Leave (6), Payroll (23), Employee (15), Dashboard (7), and Employee Separation (1). Many settings actively enforce restrictions throughout the system (see the Good to Know note below).

## Separation

**What it is:** The Employee Separation module manages the end-to-end off-boarding process — from the initial exit request through clearance, an exit interview, final settlement calculation, and approval.

**Who uses it:** HR Managers and Owners handle all tabs. Employees do not have a direct surface in this module (they submit a resignation through the Employees > Resignation self-service item instead).

**What it is:** The register of all employee exit requests raised by HR on behalf of departing employees.

- **Employee Exit** — HR fills a short form capturing the exit type, leaving date, and several process flags. The request is stored as a pending record and can be approved in the E.

**What it is:** The automated computation of the employee's final pay — covering earned salary for the partial last month, leave encashment, gratuity, minus outstanding loans/advances and any notice period shortfall.

- **Final Settlement (FNF)** — HR selects a filter to identify employees whose settlement is due, previews the itemized breakdown (earned salary, leave encashment, gratuity, deductions, net settlement), and then confirms to create the FNF request record. The computation reads salary data from the payroll setup and the most recent payroll record.

**What it is:** A filtered view of exit requests where the Is Clearance flag was set to Yes.

- **Employee Clearance** — The list shows all exits marked for clearance. No separate form is needed — the record is created through the Employee Exit form with Is Clearance = Yes.

**What it is:** A filtered view of exit requests where Exit Interview was set to Yes.

- **Exit Interview** — Works identically to Employee Clearance — the record is created through Employee Exit with Exit Interview = Yes. This tab provides a dedicated view.

**What it is:** The approval queue for all pending exit and final settlement requests.

- **E. Separation Approvals** — Both Employee Exit requests and FNF requests appear in this combined list. Each row shows the employee, request type, leaving date, and current status.

**What it is:** Configuration options for the separation workflow, organized into four sub-tabs.

**Who uses it:** HR/Admin.

- **E. Separation Settings**

# Hiring & Growth

## Recruitment

**What it is:** The Recruitment module manages the full end-to-end hiring process — from raising a job requisition and posting an open position through to screening, interviewing, evaluating, and hiring a candidate.

**Who uses it:** HR Administrators manage the entire pipeline. Specific employees may be designated as approvers for requisitions and offers. The module is accessed via the top navigation bar under **Recruitment**.

- **Recruitment Dashboard** — The Dashboard tab gives a real-time overview of your hiring pipeline. It displays summary counts — total job postings, open positions, candidates by pipeline stage (applied, screening, shortlisted, interview, evaluation, offer, hired, rejected) — so HR can see where the pipeline stands at a glance.
- **Job Request (Requisition)** — Before a job can be posted, a hiring manager submits a Job Request (also called a requisition). The system routes this request to the configured approver chain.
- **Job Post** — A Job Post is the open position that candidates apply to. Each posting must reference an approved requisition (when the approval requirement is active).
- **Job Candidate** — Candidates are added against an open job posting. Each candidate record stores contact information, source of application, expected salary, skill set, and tracks their current pipeline stage.
- **Screening** — The Screening tab shows all candidates who are at or beyond the Applied stage and are ready for initial review. HR records screening notes or scores for each candidate, then either advances them (marking them as passed screening) or rejects them.
- **Short List** — Candidates who passed screening appear in the Short List tab. HR reviews them and advances suitable candidates to the **Interview** stage, or rejects those who do not meet the bar.
- **Schedule Interview** — Candidates at the Interview stage are scheduled for an interview here. HR sets the interview date, mode (in-person, video, phone), and the interview panel.
- **Evaluation** — After an interview, HR records the evaluation — scores and a recommendation. Based on the recommendation, the candidate is either moved to the **Offer** stage or rejected.
- **Hiring Approvals** — The Hiring Approvals tab consolidates two approval queues in one place: **Job Requisition approvals** (requests from Job Request) and **Offer Approvals** (raised automatically when a candidate is moved to the Offer stage). Approvers see only the requests assigned to them.
- **Questionnaire Category** — Questionnaire categories are labels that organize interview questionnaires (for example, "Technical", "Behavioral", "Leadership"). These categories are stored in organization settings and are available as reference values across the recruitment process.
- **Skill Set** — Skill sets are a configurable list of skills (for example, "Python", "Project Management", "Financial Analysis") that can be tagged to candidates and job postings. They are stored in organization settings.
- **Recruitment Settings** — Recruitment Settings controls the global rules and approval routing for the module. Key toggles include whether requisitions and offers require approval before the next step can proceed.

## Performance

**What it is:** The Performance module provides tools for running structured appraisal cycles, recording individual performance reviews, and maintaining KPI and competency references for your organization.

**Who uses it:** HR Administrators manage appraisal cycles and configure the module. Individual performance reviews can be created and assigned by HR. The module is found in the top navigation under **Others > Performance Management** (or **Performance** depending on your menu configuration).

- **Appraisals** — An Appraisal is an individual performance review record that links an employee to a reviewer for a specific period. The review moves through three states: **Draft** (being prepared), **Submitted** (completed by the reviewer), and **Finalized** (locked by HR).
- **Appraisal Cycles** — An Appraisal Cycle defines a named review period (for example, "Annual Appraisal 2026") with a start date and end date. Activating a cycle sends a notification to all employees in the organization, signaling that the review period has opened.
- **KPIs** — The KPIs tab is a record-keeping area for documenting Key Performance Indicators. Each KPI record can be associated with an employee, given a title, category, and status.
- **Competencies** — The Competencies tab provides a similar general-purpose list for recording competency frameworks (skills, behaviors, and capabilities used in your appraisal process). Records here serve as a reference catalogue.
- **Performance Settings** — Stores organization-level configuration for the Performance module (evaluation criteria, scale labels, etc.) in a flexible settings bag. Changes take effect immediately.

## Onboarding

**What it is:** The Onboarding module provides a structured task list to guide a new hire through their first days in the organization — from document collection to system access and orientation steps.

**Who uses it:** HR Administrators create and manage onboarding tasks. Tasks can be assigned to specific employees (the new hire) or to the HR team as owners. The module is accessible under **Others > Employee Onboarding** (or **Onboarding**).

- **Tasks** — Each onboarding task is a discrete to-do item (for example, "Submit signed contract", "IT access setup", "Policy acknowledgment"). Tasks carry a title, an owner (the person responsible for completing the step), an optional due date, and the employee they relate to.
- **Checklists** — Checklists are groupings of onboarding items that HR can define and reference (for example, "IT Setup Checklist" or "HR Documentation Checklist"). This is a reference record list; the actual task workflow runs through the Tasks tab.
- **Documents** — The Documents tab provides a record of onboarding-related documents that need to be collected or issued for a new hire (for example, "NDA", "Employment Contract"). This is a tracking list — documents themselves are not stored as file attachments in this tab.
- **Onboarding Settings** — Stores organization-level defaults for the Onboarding module (default task templates, notification preferences, etc.) in the organization settings store.

## Training

**What it is:** The Training module lets HR define training programs, track sessions, manage trainers, enroll employees, and collect feedback — giving the organization a central register of all training activity.

**Who uses it:** HR Administrators manage programs, sessions, and enrollments. The module is found under **Others > Training Management** (or **Training**).

- **Programs** — A Training Program is the primary record — it names the training offering, provides a description, assigns a category, and carries a status (Draft, Active, or Archived). HR can change a program's status at any point using the status action.
- **Enrollments** — An Enrollment links an employee to a specific training program. Each enrollment tracks its own status: **Enrolled**, **Completed**, or **Dropped**.
- **Sessions** — The Sessions tab is a supporting record list for logging specific instances or runs of a training program (for example, "Python Basics — Batch 3, July 2026"). Each session entry carries a title, category, status, and can be linked to an employee or trainer reference.

- **Trainers** — The Trainers tab maintains a register of trainers — internal or external — who conduct training programs. Records here serve as a reference list for scheduling and reporting.
- **Feedback** — The Feedback tab provides a place to log participant feedback collected after a training session. Each record can reference an employee and capture the feedback content and a status (for example, Pending review, Reviewed).
- **Training Settings** — Stores organization-level configuration for the Training module (categories, default settings) in the organization settings store.

# Time & Attendance

## Attendance

**What it is:** The Attendance module tracks when employees check in and out each day, manages shift plans, processes correction requests, and gives HR a real-time view of who is present, absent, or missing.

**Who uses it:** HR/Admin manages the full module rail. Employees access a self-service view (ESS) with four items only.

- **How Attendance Is Captured** — Attendance data enters NexaPeople from biometric punch devices (fingerprint or card readers). Every time an employee punches — at shift start, mid-day, or shift end — the system records a timestamp.

**What it is:** Employees access four attendance-related actions from their personal dashboard under **Attendance**.

**Who uses it:** Employees only. HR staff use the separate HR Attendance rail.

- **Employee Self-Service Attendance (ESS)** — An employee can submit a formal request to record or correct attendance for a specific day — for example, if they forgot to punch in. The request includes the date, check-in time, check-out time, and a reason, then routes to the configured approver(s).

**What it is:** The full HR Attendance module at **Dashboard** → **Attendance** gives HR managers a complete set of tools to manage and correct attendance across the organisation.

**Who uses it:** HR/Admin roles only.

- **HR Attendance Rail** — A combined inbox listing all pending attendance-related requests across the organisation — attendance corrections, worksheets, exemptions, remote work, and shift requests. HR can approve or reject each request from a single screen.

**What it is:** A five-tab configuration area reached from **Attendance** → **Attendance Settings**.

**Who uses it:** HR/Admin only.

**What it is:** A live overview of today's (or a selected period's) attendance position across the organisation, reached from the main Dashboard under the **Attendance** tab.

**Who uses it:** HR/Admin.

- **Attendance Dashboard** — The dashboard shows quick-view counts (Present, Absent, Missing, On Leave, Off), an **Available Employees** tab listing employees currently in the office, and separate **Missing** and **Absent** tabs. A **Station × Department** matrix displays present vs.

**What it is:** NexaPeople connects to physical biometric punch devices (fingerprint/card readers) to receive attendance data automatically.

**Who uses it:** HR/Admin.

- **Biometric Device Management** — Each physical device is registered with its network address and credentials. Once registered, HR can trigger a manual sync (pull) at any time, or the device/middleware can push punch data to NexaPeople automatically using a secure company token.

## Leave

**What it is:** The Leave module manages employee leave requests, compensation leave, leave type policies, and quota tracking.

**Who uses it:** Employees submit and track their own leave from an ESS view. HR/Admin manage approvals, configure leave types, and adjust employee balances from the HR rail.

**What it is:** Employees apply for leave, view their own balances, and track request status from **Dashboard → Leave**.

**Who uses it:** Employees.

- **Employee Leave Request (ESS) —** The employee selects a leave type, specifies dates and duration (full day, half day, or quarter day, depending on what the leave type permits), and optionally attaches a supporting document. The request is submitted and routed to the configured approver(s).

**What it is:** The HR Leave module at **Dashboard → Leave** (visible to HR/Admin only) provides four tabs to manage the full organisation's leave activity.

**Who uses it:** HR/Admin.

- **HR Leave Rail —** HR sees all employees' leave requests in a single list. The list can be filtered by employee, leave type, and status.

**What it is:** A three-section sub-menu under **Dashboard → Leave → Leave Settings** that controls all leave policies for the organisation.

**What it is:** Work From Home (also labelled **Remote Work**) lets employees request approval to work from a location outside the office for a specified period.

**Who uses it:** Employees submit requests from their ESS Attendance view. HR/Admin can view and approve all remote work requests from the Attendance Approvals inbox.

- **Work From Home (Remote Work) —** The request captures the dates and times the employee will be working remotely, plus a reason. Once submitted it follows the same approval routing configured in **Attendance Settings → General Attendance Setting → Attendance Request Forwarding** for the Remote Work type.

# Payroll & Money

## Payroll

**What it is:** The Payroll module handles the complete pay-run lifecycle — from configuring how salaries are structured and calculated, through generating and processing payslips, to approving and disbursing pay.

**Who uses it:** HR Administrators manage the full 23-tab rail (setup, processing, approvals, requests, settings). Employees access a separate self-service payroll page to submit and track their own requests.

- **Payroll Setup** — A Payroll Setup is a named configuration profile that controls how the payroll engine runs — including pay schedule, per-day salary method, tax slabs, overtime rules, auto-deduction rules, provident fund and VPS policies, and final settlement parameters. An organization can maintain multiple named profiles (for example, one for salaried staff and another for field staff).
- **Salary Setup** — Each employee has their own Salary Setup record that defines their pay rate, salary type, breakup (how gross pay is divided into line items such as Basic, Housing, Transport), recurring allowances, recurring deductions, overtime rates, and payment details. The system supports three salary types — Monthly, Hourly, and Daily — each with a different field set.
- **Process Payroll** — HR uses Process Payroll to generate payslip records for a given month and year, then move each record through a three-stage lifecycle: Draft → Processed → Paid. The engine reads each employee's active Salary Setup (breakup, recurring deductions, overtime-rate tables) and the active Payroll Setup (per-day method, auto-deduction rules, tax slabs, PF/VPS policy) to compute gross pay, deductions, tax, and net pay automatically.
- **How Payroll Is Calculated** — When a pay run is generated, the payroll engine applies the following steps for each employee:
- **Auto-Deductions** — Auto-deduction rules are configured per Payroll Setup under the **Auto Deductions** sub-tab. You can control independently whether each class of attendance event deducts salary, and at what rate.
- **Payroll Approvals and Payslip Approvals** — There are two approval screens in the payroll rail.
- **Payroll Request Tabs (HR Side)** — Thirteen dedicated tabs in the payroll rail allow HR to view, filter, add, and action each type of payroll request on behalf of employees. All tabs follow the same layout: a filter panel, a results grid, an Add form, and per-row Approve / Reject actions.

**What it is:** Payroll Settings is the organisation-level configuration panel for payroll behaviour and reference data.

**Who uses it:** HR Administrators only.

- **Payroll Settings**

**What it is:** Employees have a dedicated Payroll self-service page where they can submit payroll-related requests and view the status of their submissions.

**Who uses it:** Employees (non-HR).

- **Employee Self-Service — Payroll Requests**

## Expense and Claims

**What it is:** The Expense module provides a simple workflow for logging employee expense claims and moving them through approval to reimbursement.

**Who uses it:** HR Administrators create and action claims on behalf of employees. Employees with the right permissions can raise their own claims.

- **Submitting an Expense Claim** — A claim record carries an employee, a title, a category, an amount, a date, and a description. It starts as Pending and moves through Approved to Reimbursed.
- **Approving and Reimbursing** — The Claims grid shows all expense claims for the organisation. HR can take action directly from the grid.

## Piece Work

**What it is:** The Piece Work module records piece-rate pay entries where an employee is paid based on the quantity of a task or item they complete at a fixed rate per unit.

**Who uses it:** HR Administrators create entries and act on them. The module is suited to organisations that pay production or task-based workers separately from the main payroll.

- **Logging a Piece-Work Entry** — Each entry records an employee, a title (the item or task), a quantity, a rate per unit, and a work date. The system automatically computes the amount as quantity × rate.
- **Approving and Paying** — The entry follows a three-step workflow: Pending → Approved → Paid.

## Letters

**What it is:** The Letters module is a framework for issuing HR letters and documents to employees (for example, experience letters, offer letters, or salary certificates).

**Who uses it:** HR Administrators.

# Reports & Automation

## Reports

**What it is:** The Reports module lets you generate tabular data reports across five areas of the system — HR, Attendance, Leave, Payroll, and Employee Separation — and export or print those results.

**Who uses it:** HR Managers and Administrators use the full HR view at `/dashboard/reports`. Employees can access a self-service view at `/dashboard/reports-ess` that automatically scopes every report to their own data only.

- **Generating a Report** — Reports are organized into categories in a collapsible left sidebar. Clicking a report name opens its filter form on the right.
- **Report Categories and Available Reports** — The system provides five report families. Each family groups related reports that share a common data source.
- **Viewing and Exporting Results** — After generation, the report opens in a full-screen modal viewer. It shows the organization name, report title, the date range used, who printed it, and a row count.
- **Employee Self-Service Reports View** — Employees who log in with an Employee role see a self-service reports page with the same four category groups (HR, Attendance, Leave, Payroll) and the same filter forms. The server automatically restricts every report result to the logged-in employee's own records only, regardless of which employee filter values the form sends.

## Scheduled Report

**What it is:** Scheduled Report lets administrators configure reports to be delivered automatically on a recurring schedule.

**Who uses it:** HR Administrators and System Administrators.

- **Managing Report Schedules** — The module has three tabs: **Schedules** (the list of configured schedules), **Run History** (a log of past automated runs), and **Settings**. Schedules are stored as records in the system's general-purpose configuration store.

## Scheduled Alerts

**What it is:** Scheduled Alerts lets administrators define automated alert conditions that the system evaluates on a schedule and fires as in-system notifications when triggered.

**Who uses it:** HR Administrators and System Administrators.

- **Managing Alerts** — The module has three tabs: **Alerts** (configured alert definitions), **Alert Log** (a record of past alert firings), and **Settings**. Alerts are stored as configuration records.

## Integrations

**What it is:** Integrations is the module for managing connections to external systems, outbound webhooks, and API keys used by third-party tools to access NexaPeople data.

**Who uses it:** System Administrators.

- **Connections** — The **Connections** tab (the default view) holds records describing integrations with external systems. Each connection record stores identifying information about the external system.

- **Webhooks** — The **Webhooks** tab stores outbound webhook definitions. Each webhook record can be triggered manually using the **Fire Webhook** button on that row, which sends a test payload to the configured endpoint.
- **API Keys** — The **API Keys** tab stores API key records that allow external applications to authenticate against NexaPeople's API. Keys are managed here as configuration records.
- **Integrations Settings** — The **Settings** tab under Integrations holds module-level configuration options.

## Email Management

**What it is:** Email Management lets administrators define email templates and review the log of emails sent by the system.

**Who uses it:** HR Administrators and System Administrators.

- **Email Templates** — The **Templates** tab (the default view) holds a list of email template records. Each template stores a name, subject, and body that the system uses when sending automated emails (for example, notifications or alerts).
- **Email Log** — The **Email Log** tab records all emails sent by the system, including the recipient, subject, template used, and timestamp.
- **Email Settings** — The **Settings** tab under Email Management holds module-level configuration. The system's outbound email delivery is powered by SendGrid; the API key and sender address are configured at the server level by your administrator.

# Workspace & Administration

## Help Desk

**What it is:** Help Desk lets employees raise internal support tickets and allows HR or the relevant team to track and resolve them.

**Who uses it:** Employees raise tickets from any role. HR or team leads manage and resolve them.

- **Raising a Support Ticket** — Each ticket captures a subject, an optional category (linked to the owner team), a description of the issue, and a priority level. Tickets start with a status of **Open** and move through **In Progress**, **Resolved**, and **Closed** as work progresses.
- **Managing Ticket Status** — Whoever is resolving the ticket changes its status as work progresses. The four stages are Open, In Progress, Resolved, and Closed.
- **Managing Ticket Categories** — Categories define the support teams and an SLA (response time in hours) for each type of request. Categories drive the Category dropdown on new tickets.
- **Knowledge Base** — The Knowledge Base is a list of self-service articles. HR or admin staff publish articles so employees can look up answers before raising a ticket.

## Man Power Budgeting

**What it is:** Man Power Budgeting provides a simple headcount-planning register.

**Who uses it:** HR managers and administrators who own workforce planning. Employees do not typically access this module.

- **Creating a Budget Line** — Each budget line represents one position in one department for a given planning period. You record the budgeted headcount and the current actual headcount.
- **Raising a Requisition** — When a budget line has a gap (budgeted headcount exceeds current), you can raise a requisition to initiate hiring. Requisitions record the position, department, headcount requested, and approval status.

## Employee Travelling

**What it is:** Employee Travelling manages business travel requests with a lightweight approval workflow.

**Who uses it:** Employees or HR staff submit travel requests. HR managers approve or reject them.

- **Submitting a Travel Request** — Each travel request captures the destination, purpose, travel dates, and an estimated cost. The request starts as Pending and must be approved before the employee travels.
- **Approving or Rejecting a Travel Request** — HR or an approver reviews pending requests and moves them to Approved or Rejected. Once travel is complete, the request is marked Completed.
- **Logging Travel Expenses** — After a trip, the employee or HR logs actual expenses against the travel. Each expense entry has a description, category (Airfare, Hotel, Meals, Local Transport, or Other), amount, date, and approval status.

## Desk Management

**What it is:** Desk Management is a workspace allocation register.

**Who uses it:** Facilities managers or HR administrators maintain the desk list. Employees or their managers may raise bookings.

- **Managing the Desk Inventory** — Each record represents one physical desk identified by a code. You record its location or floor and the employee it is assigned to, along with its status (Available, Occupied, or Maintenance).
- **Recording a Desk Booking** — A booking links an employee to a desk code for a date range. Bookings move through the statuses Booked, Checked In, Released, and Cancelled.

## Settings

**What it is:** Settings is the organization-wide configuration area where administrators control system behavior, company information, custom fields, biometric devices, document storage, and email configuration.

**Who uses it:** System administrators and organization owners only. Regular employees and HR managers do not have access to this area.

- **System Configuration** — System Configuration contains toggle switches and dropdown controls across six categories — Attendance (19 controls), Leave (6), Payroll (23), Employee (15), Dashboard (7), and Employee Separation (1). Controls include ON/OFF toggles, period selectors (e.g.
- **Company Settings** — Company Settings stores the basic identity information for your organization and the company logo.
- **Custom Fields** — Custom Fields let administrators define additional data fields for specific modules. Each field is attached to a module (such as Employee List, Recruitment Evaluation, or Expense Request) and appears on that module's forms.
- **Biometric Device Settings** — Biometric Device Settings stores the Company Token (used by biometric devices to authenticate attendance pushes) and manages the list of physical biometric devices. Each device entry records an IP address, port, device type, station name, and password.
- **Document Management** — Document Management shows a table of twelve HR modules (Attendance, Leave, Payroll, Employee, Recruitment, Organization, Letters, Expense, Employee Travelling, Help Desk, Piece Work, and Training). For each module you can toggle whether file attachments are allowed, and see how much storage that module is consuming against the organization's storage quota (displayed as a "X GB / 5 GB" header).
- **Card Template** — Card Template lets you select the design template used when generating employee ID cards. The selected template is used when cards are printed or exported.
- **Email Domain Setting** — Email Domain Setting configures the sender domain and display name used for system emails (notifications, payslips, alerts, etc.).

## The Generic "Others" Module Engine