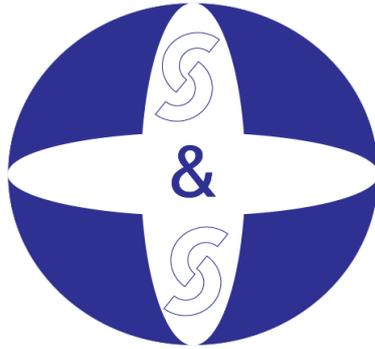# SMARTBOOK SOFTWARE

Human Resource System User Guide(EN)

S&S Auditing & Consulting Co., Ltd

SMARTBOOK SOFTWARE

HUMAN RESOURCE USER GUIDE

TABLE OF CONTENT

I.   SOME DEFINITIONS

1. Section Content

In the process of managing the human resources task, a number of individual words will be used. This section will explain those.

2. Explanations:

- Function box (Figure I.2.1) contains:
  + Reports list: List of new employees; Timekeeping Report; Monthly Salary Report
  + Order list: Calculate timekeeping, Calculate Payroll, Get timekeeping data.…
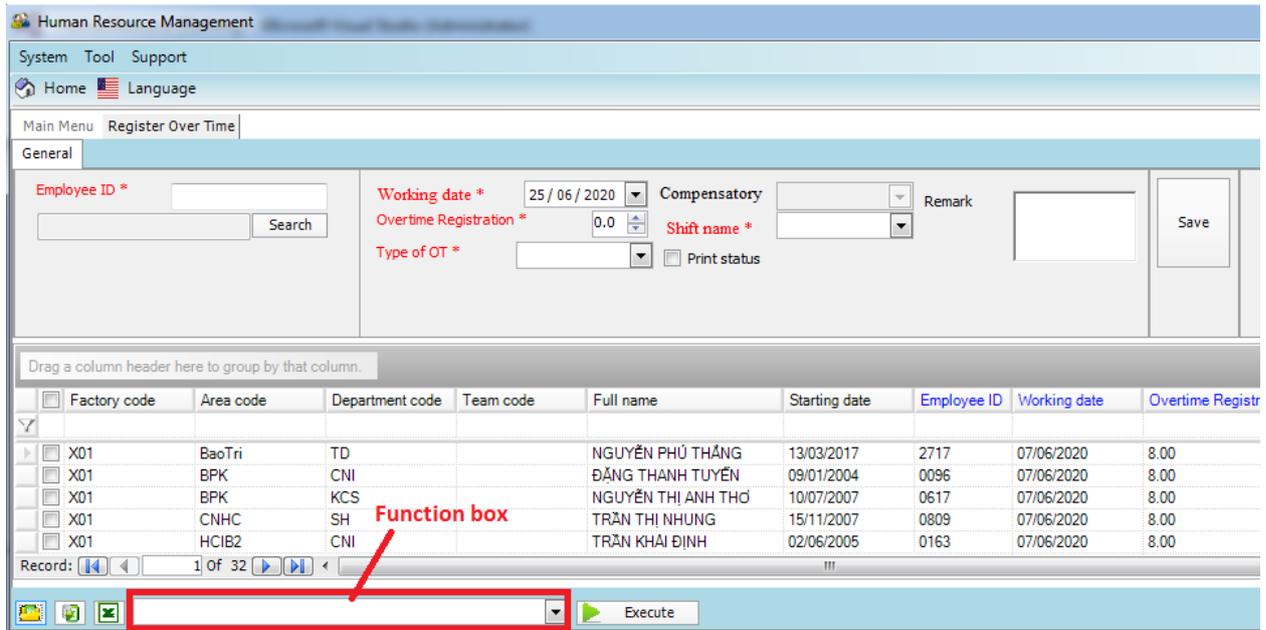
I.2.1

- Grid/ data grid: Figure 1.2.2
  - o   The data display of all information after input the software.
  - o   Users can edit data on the grid
  - o   Filter data, right on the line with the icon ▽.
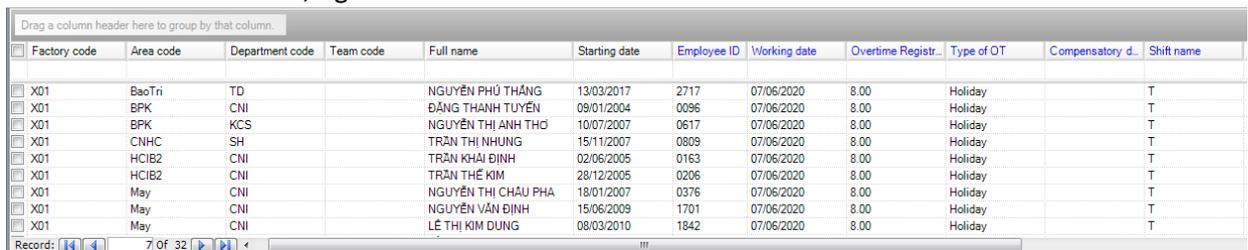
I.2.2

- Toolbar (Figure I.2.3): Using to typing information and search data.
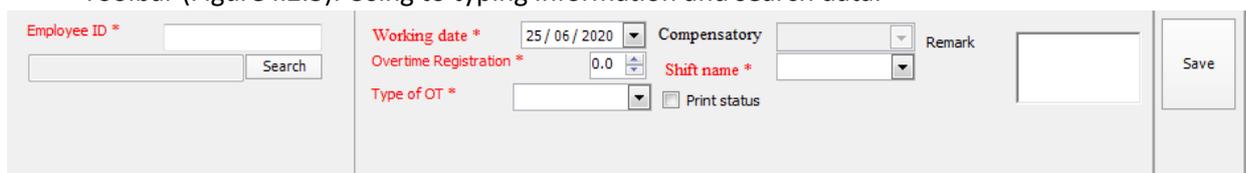
I.2.3

- Task bar (Figure I.2.4): The interface on the left of the screen contains 4 main modules of the software and a list of Item and management functions within each module.

-

Module	Item and function
General settings	Company information; Register a new user or delete Current user; User permission...
Employees information	Staff information; Family information; Transferring position....
Timekeeping	Registration of overtime; Registration of leave; Calculation timekeeping ...
Payroll	Pay Grade settings; List of dependents; Payroll....
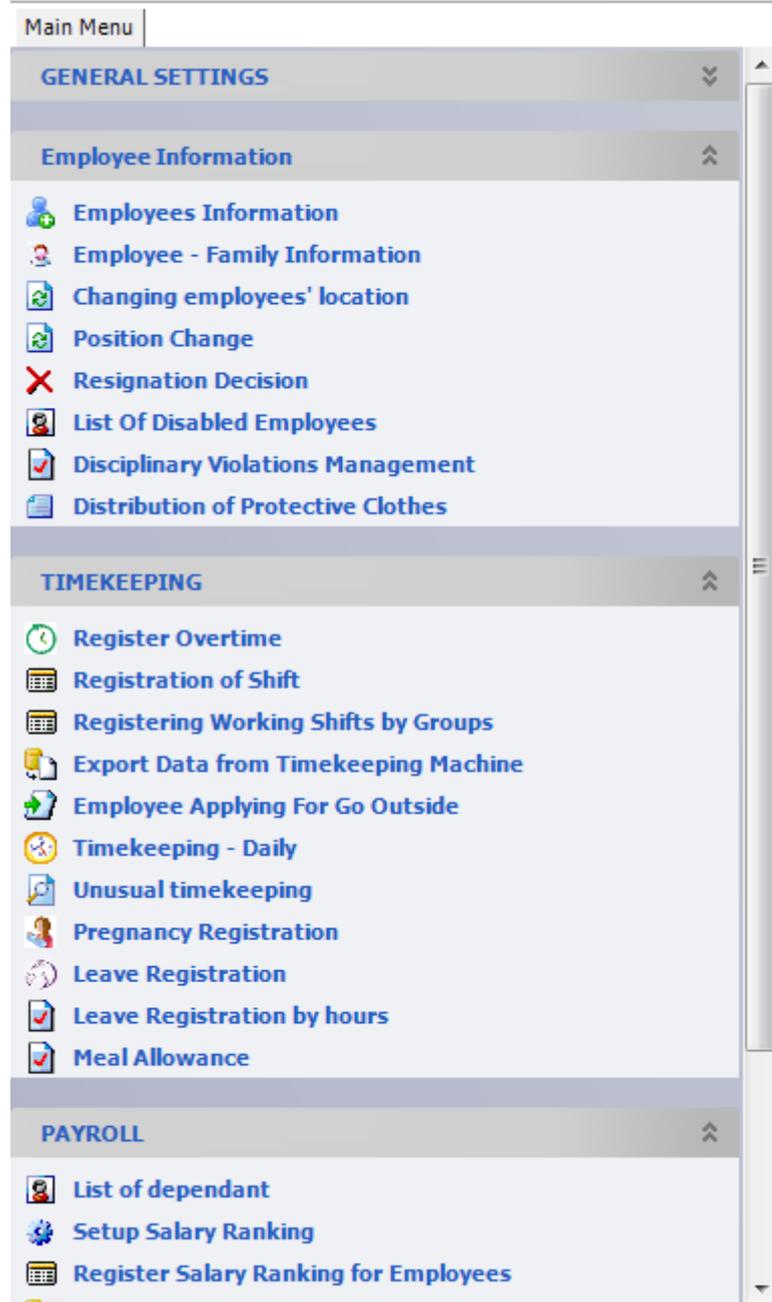
I.2.4

II.   GENERAL GUIDANCE

1. General interface

The user's screen usually consists of 6 parts and has the same design as Figure II.1.1. The usage of these interfaces is the same and is generally guided in Section II.2. With some special interfaces, there will be detailed instructions for each of them.

- The red frame (1) - Toolbar: Use to fill data in.
- The red frame (2) - Data grid: Use to display data, display reports.
- The red frame (3): Use to import data from Excel file and export data to Excel file.
- The red frame (4) - Function box: Use to select reports or commands.
- The red frame (5): Implement the reports / commands in the box (4).
- The red frame (6): Includes the function keys Refresh, Save, Delete data on the grid.
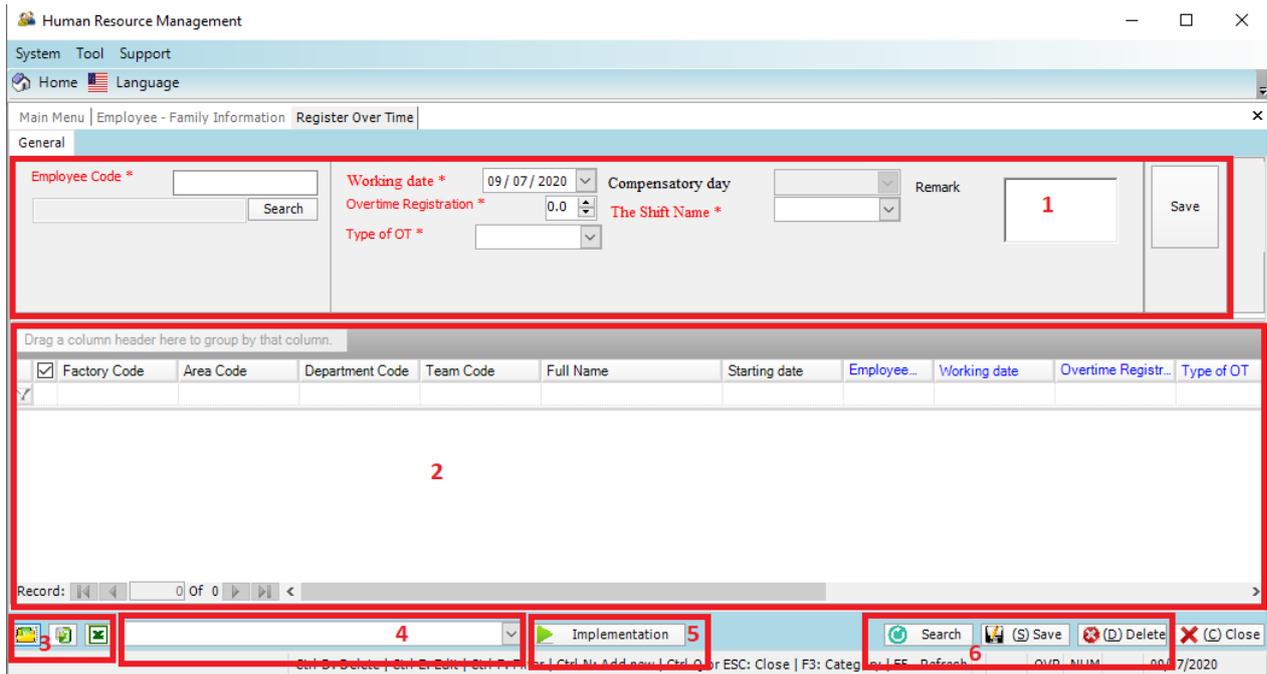
II.1.1

2. Instructions to create data

2.1. Section Content

Instruct users on how to create data such as employee information, maternity data, the shift data, leave registration data, etc.

Method of creating data:

- Typing the information directly in the software interface: This method is suitable when creating data for a small number of employees or the data is being saved as paper documents.
- Create from Excel template file: This method is suitable for creating data for a large number of employees, and the data is saved in excel file format.

2.2. Method of creating data directly on the software interface

On the toolbar, follow these steps: (1) Typing the information -> (2) Click **Save** button to save the data to software. Figure II.2.1

II.2.1

Noted:

- Information with red color and asterisk * are required to input data.
- Icon ⬤ is flashing: After clicking the **Save** button, if this icon flashes that mean the software has detected an error and user need to additional information into box where it appears.

2.3.Create data from the Excel template file

The steps are as follows: Take the sample file from the software -> Typing information in the template file and save -> Import the data from the template file into the software.

a. Step 1: Get template file

Follow the steps as shown in Figure II.2.2
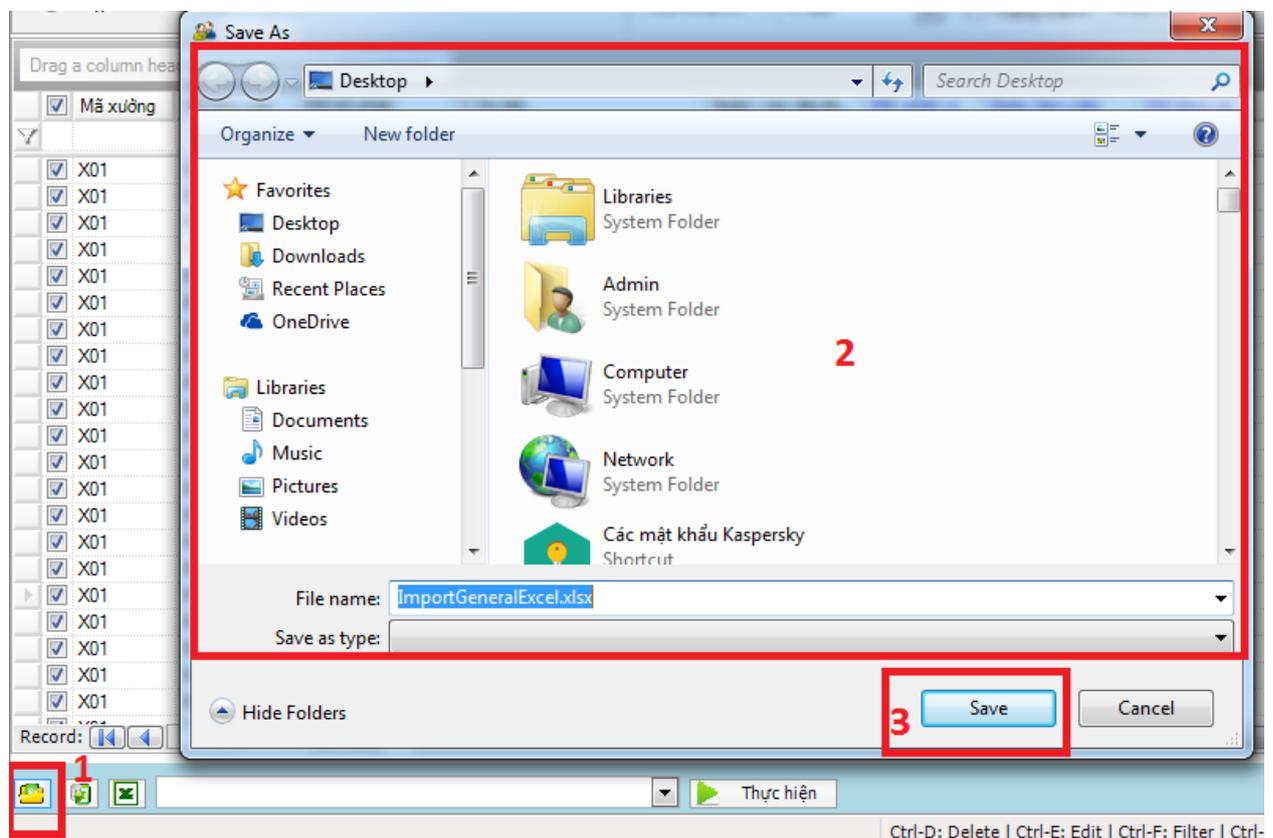
II.2.2

- (1): Click [icon] to get template file.
- (2): Select a folder to save the file. The default template file name is ImportGeneralExcel.xlsx (can rename the template file to suit users)
- (3): Click **Save** to save template file.

Noted:

Regulations on folders name or template file names: English or Vietnamese without spaces and no accent. Example: FileMau.xlsx, DangKyTangCa.xlsx…

b. Step 2: Typing information in the template file

Typing information in the template file was taken in part **a**.

Example: Typing the overtime registration information (Figure II.2.3)

	A	B	C	D	E	F	G	H
1								
2	**Register Over Time**							
3								
6	**Employee Code**	**Working date**	**Overtime Registration**	**Type of OT**	**Compensatory day**	**The Shift Name**	**Print status**	**Remark**
7	2711	27/03/2020	1	1		Ca1		test
8	1138	28/03/2020	1.5	1		Ca2		test
9								

II.2.3

Regulations Typing information in the template file

- Do not insert columns or lines in the template file.
- Do not blank lines between the two information lines. If the line is blanked, the information of the lines below the blank line will lose.
- The columns containing the red title cell are required to fill in information.
- Example of the incorrect information input: (Figure II.2.4) This is a common user error (the red frame and the red X letter)

	A	B	C	D	E	F	G	H
1								
2	**Register Over Time**							
3								
6	**Employee Code**	**Working date**	**Overtime Registration**	**Type of OT**	**Compensatory day**	**The Shift Name**	**Print status**	**Remark**
7	2711	27/03/2020	1	1		Ca1		
8					X			
9	1138	28/03/2020	1.5	X		Ca2		test
10								
11								

II.2.4

c. Step 3: Import data from template file in to software

Follow the steps as shown in Figure II.2.5
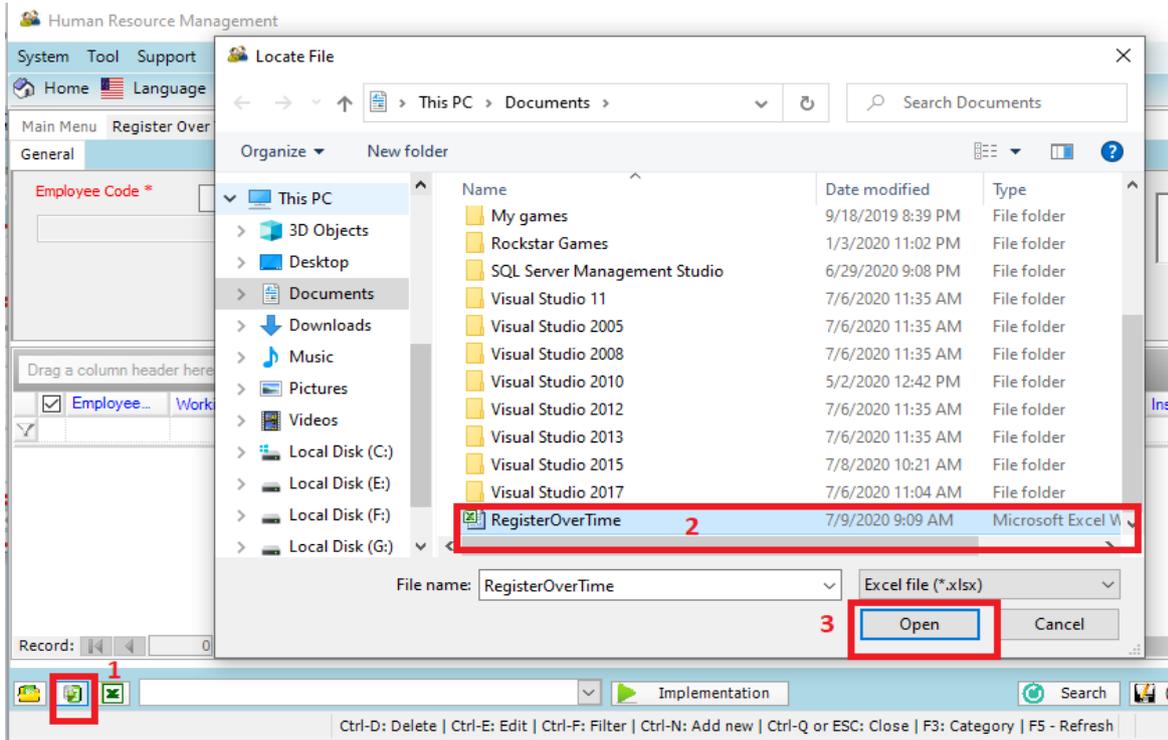
II.2.5

- (1): Click [icon] button to import data from the template file.
- (2): Find the template file, then click to the template file.
- (3): Click Open. (It can ignore step 3 if double-click the template file).

After steps 2 and 3, the data will be displayed on the grid of software as Figure II.2.6
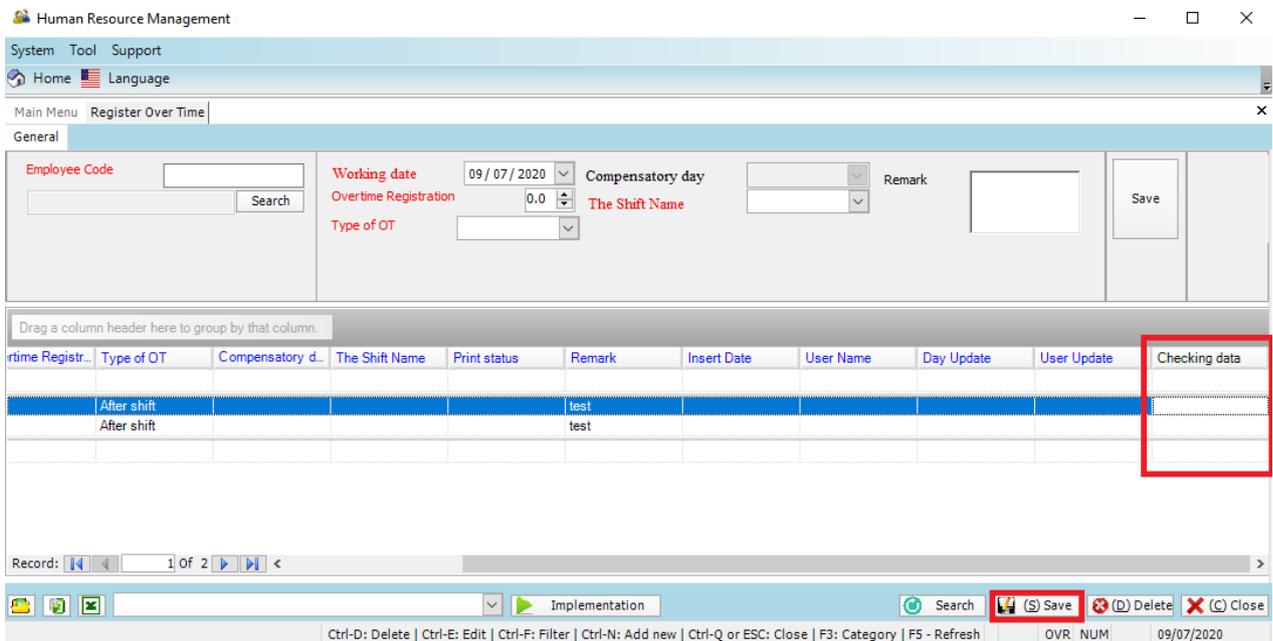
II.2.6
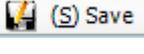
- (4): Click [icon] (S) Save button to save data to the software. Finished creating data with Excel file

Noted:

In the case: After click **Save**, the software displays a message of failure. Checked the input errors in the **Input Checking** column (Figure II.2.6).

3. Instructions to edit data

3.1. Section Content

After creating data into software, it can edit directly on the data grid.

3.2. Implementation instructions

- Columns with blue headline are allowed to edit.
- After edit directly data on the grid -> Click ![(S) Save] to save the data. Figure II.3.1,
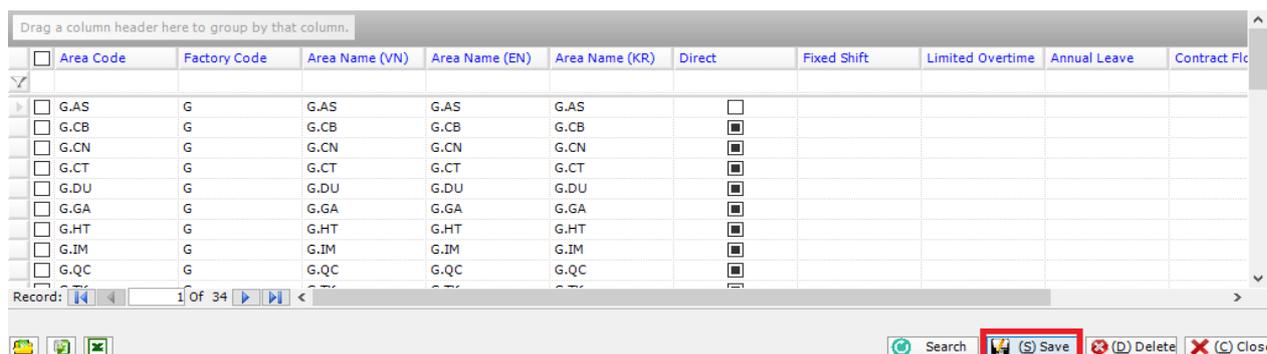
II.3.1

4. Instructions to delete data

4.1. Section Content

This section contains instructions for deleting data currently displayed on the grid.

4.2. Implementation Instruction:

To delete data, follow these steps: (1) Select the checkbox to delete -> (2) Click ![(D) Delete] to delete data. Figure II.4.1
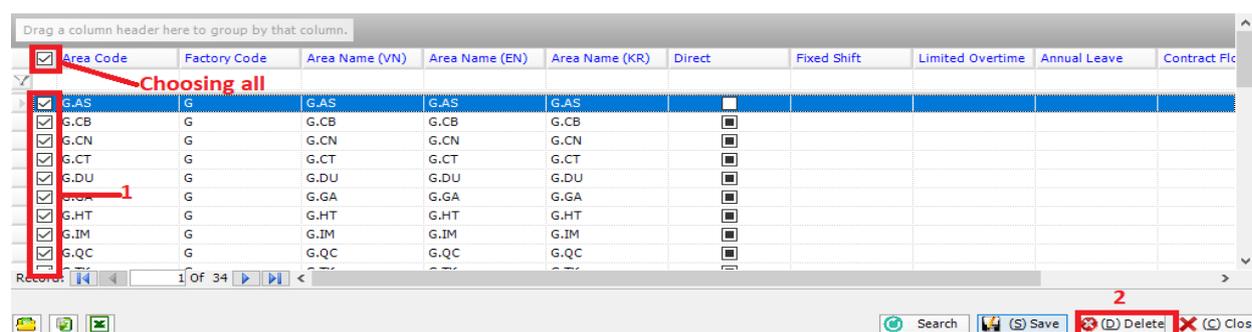
II.4.1

Noted:

To delete all data on the grid: Select all the rows on the grid with the Choosing all button Choosing all button (Figure II.4.1) in the headline or reselect to deselect all.

5. Instructions to export data from the grid into Excel files

5.1. Section Content

This section guide to export the information to an Excel file which were displayed on the grid. (This is a copy of the data grid in Excel format, also known as raw data.)

5.2. Implementation instructions

The steps are as follows: (1) Select the line to export data -> (2) Click [📗] -> (3) Select a folder to save the file and rename the file if needed -> (4) Click **Save** to export the data output to Excel file. (Figure II.5.1)
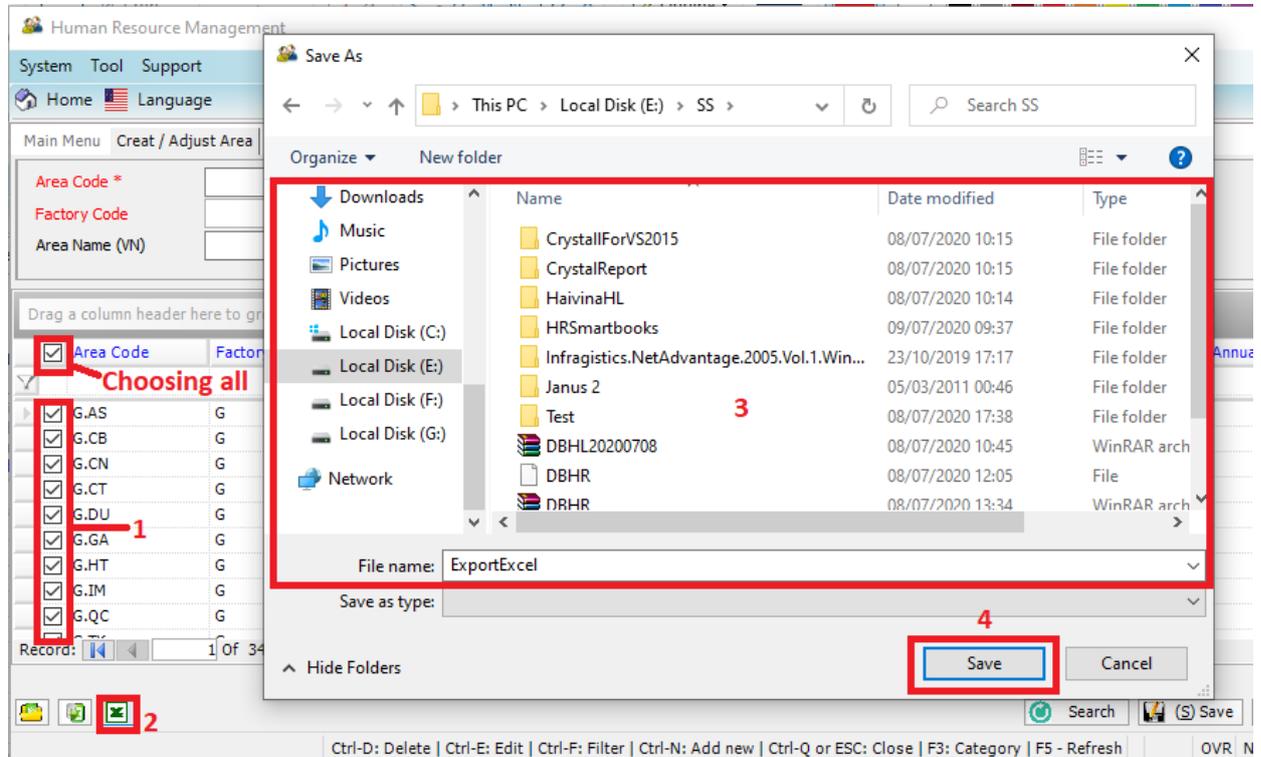
II.5.1

Noted:

- Select all rows on the grid with the Choosing all button in the headline or reselect to deselect all.
- Corrupted Excel file in the case:
    + Save the file into the Vietnamese names folder with accents or special characters.
    + Set file name in Vietnamese with accented or special characters.

6. Instructions to export the Report file

6.1. Section Content

This section guides how to export report files in grid view and view as Excel file

6.2. Implementation Instruction

a. View report on data grid
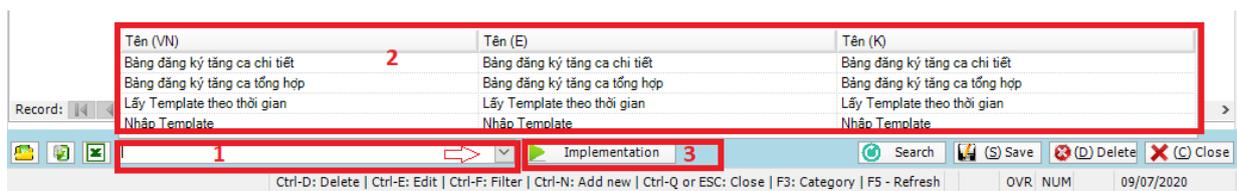
II.6.2

Follow the steps (Figure II.6.2)

- Step 1: Click the Function box to display a list of reports
- Step 2: Select the report to view
- Step 3: Click **Implement**.
- Step 4: Select the information on the dialog box just appeared.
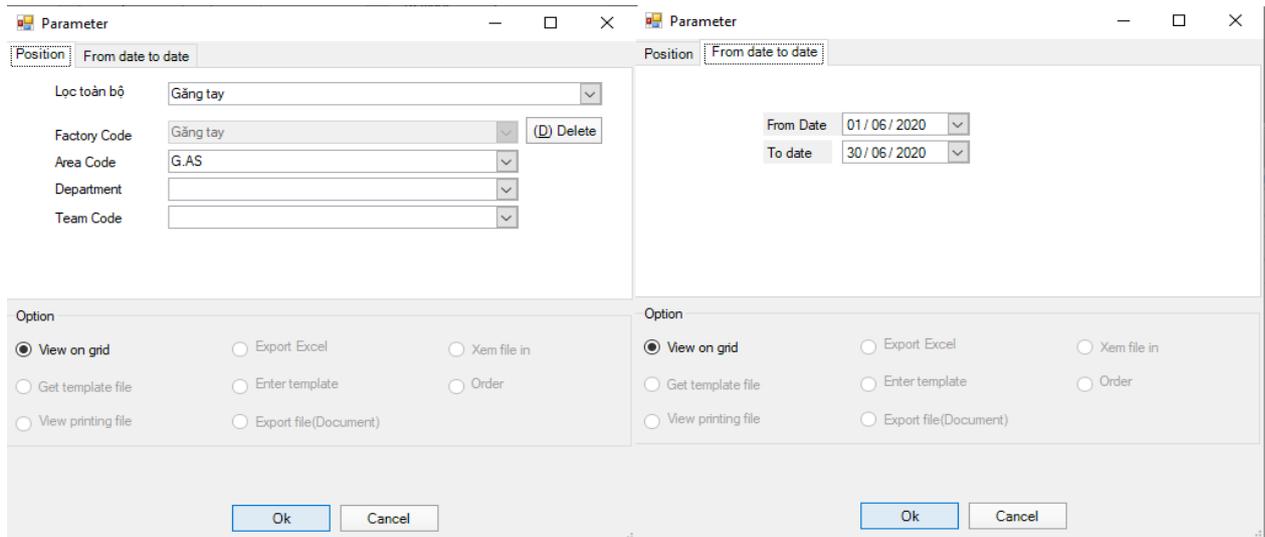
II.6.2

Example: (Figure II.6.2) In the Location Tab: choose to export data of X01 Department, AUDTO Department, KCS Group.

In Tab From Date to Date: select to export data from February 1, 2020 to February 29, 2020

- Step 5: Select **View on grid**.
- Step 6: Click **OK** to continue or click **Cancel** to cancel

The report will display on the grid as Figure II.6.3

II.6.3

b. View report as excel file
- From Step 1 to Step 4: Implement the same part **a**
- Step 5: Select **Export to Excel**, then click **OK** to export the report as Excel or **Cancel** to cancel the order. Figure II.6.4.

II.6.4

- Step 6: Rename the report file (if necessary) and select a folder to save. Example: Figure II.6.5

II.6.5

Noted: The name of folder and Excel file must be writing closed together and no accent, no special characters.

7. The effect of the REFRESH button is on the software

REFRESH button (Figure I.7.1): using to refresh or reload data on the grid.

8. Instructions to changing Languages

8.1. Section Content

Currently, the software supports three languages VIETNAMESE - KOREAN - ENGLISH.

8.2. Implementation Instruction

After logging in to software, click on the flag icon (at the top left of the screen) to choose the language that suits the user. (Figure II.8.1).
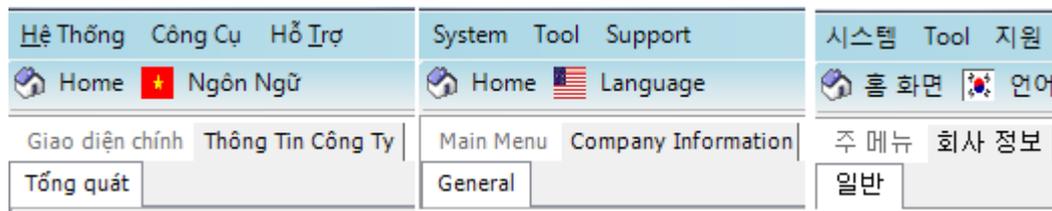
II.8.1

9. The Utility Group the Data on grid

9.1. Utility Content

Support group data on grid according to user's criteria and help users read data more easily.

9.2. Implementation Instruction

- Implementation: On the data grid, in the headline, click and drag up the information columns to group data. Depending on the user criteria, which column will click and drag up the first or later. it can be dragging no limited one column or more ones.
- Example: Group data by EMPLOYEES and DATE columns, follow the direction of the arrow and the result

Result.

10. The Utility Filter Data on the grid

10.1. Section Content

This utility helps users to filter the information to be searched on the data grid.

10.2. Implementation Instruction

The framed section is the support section to fill in the information. (Figure II.10.1)

Location	Employee...	Full Name	Access Date	Access Time	Card Code	Insert Source	
		Minh					
Găng tay | GS03	HT001033	Nguyễn Thị Minh	01/07/2020	07:18:00	HT001033	MayChamCong	
Găng tay | GS03	HT001033	Nguyễn Thị Minh	01/07/2020	16:34:00	HT001033	MayChamCong	
Găng tay | GS03	HT001033	Nguyễn Thị Minh	02/07/2020	07:16:00	HT001033	MayChamCong	
Găng tay | GS03	HT001033	Nguyễn Thị Minh	02/07/2020	16:35:00	HT001033	MayChamCong	
Găng tay | GS03	HT001033	Nguyễn Thị Minh	03/07/2020	07:19:00	HT001033	MayChamCong	
Găng tay | GS03	HT001033	Nguyễn Thị Minh	03/07/2020	15:34:00	HT001033	MayChamCong	
Găng tay | GS03	HT001033	Nguyễn Thị Minh	04/07/2020	07:18:00	HT001033	MayChamCong	
Găng tay | GS03	HT001033	Nguyễn Thị Minh	04/07/2020	16:34:00	HT001033	MayChamCong	
Găng tay | GS03	HT001033	Nguyễn Thị Minh	06/07/2020	07:18:00	HT001033	MayChamCong	

II.10.1

Noted: Use the asterisk * symbol to representation for a string of numbers or letters. For example: In Figure II.10.1, the asterisk * symbol represents to the characters standing before and after the word "MINH".

III. INSTRUCTION TO LOG IN - LOG OUT - EXIT THE SOFTWARE

1. Log in

Double click on the icon [icon] to start the software.

After starting the Smartbook personnel management program, user will fill in the login information in the dialog box as shown in Figure III.1.1:
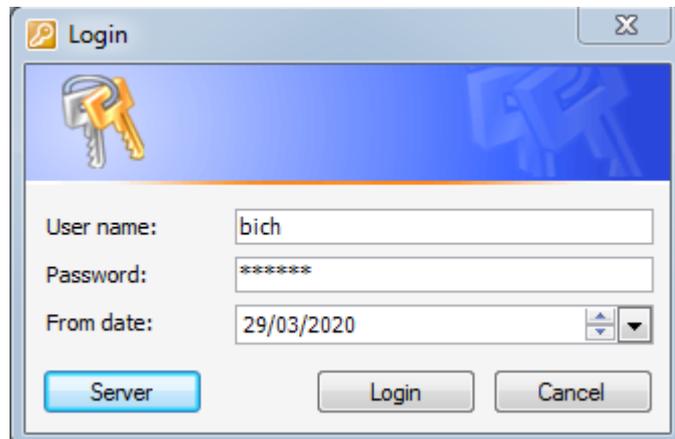
III.1.1

After click Login button, if the account is valid and the correct information, user will be log into the main interface of software.

2. Logout - Exit

To log out of the user or exit the software: Go to SYSTEM -> select LOG OUT or EXIT (Figure III.2.1)
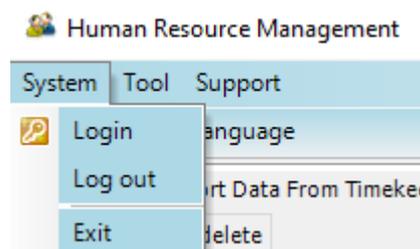
III.2.1

IV.   GENERAL SETTINGS MODULE

The GENERAL SETTINGS module (Figure IV.1) use to establish initial information or changing existing information and application for all the company. This module includes the following items:

- Company information.
- List of departments, divisions, teams, groups, positions ...
- List of gender, ethnicity, religion, education level ...
- Registration a new user or delete an existing user.
- Decentralized use
- ...
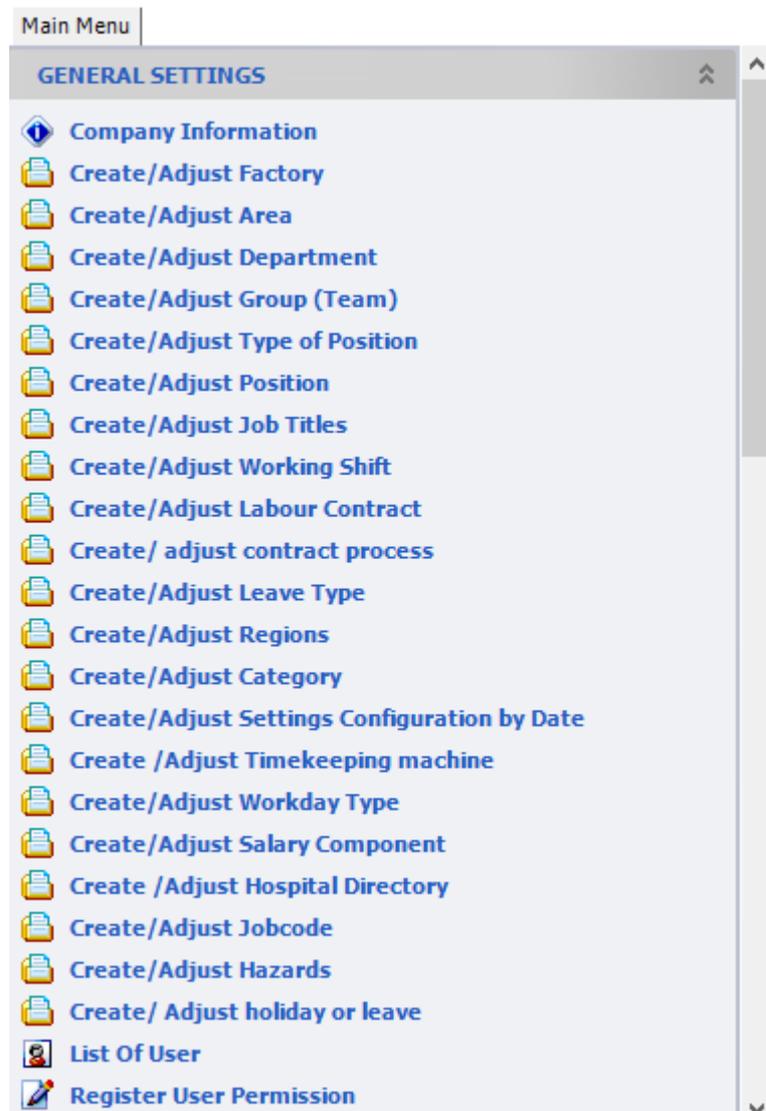
IV.1

1. Company information

1.1. Content description:

This item manages company information such as name, address, contact phone number, …

1.2. Implementation Instruction

a.   Guide to creating new

Follow the steps: (1) In the Taskbar, choosing ◉ Company Information -> (2) Typing the company information in the toolbar -> (3) Click Save.

After setup is complete, the data will be displayed as Figure IV.1.1.
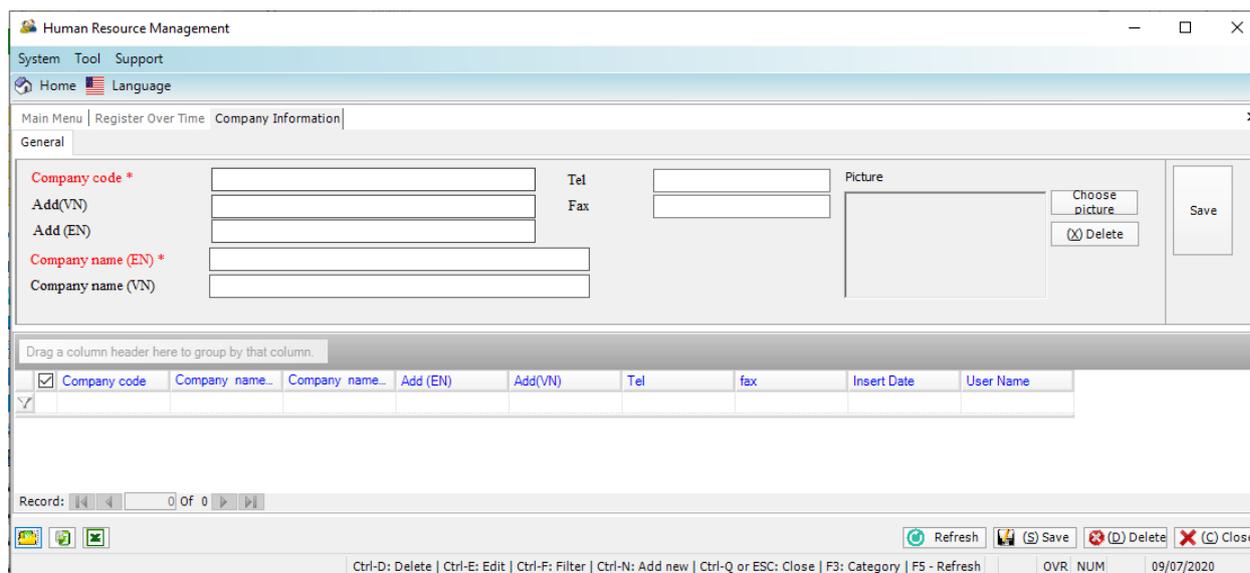
IV.1.1

b. **Instructions to edit, delete and export data**
To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

2. Structure of the Departments, Divisions in the enterprise (Guide to create Factory, Area, Departments...)

2.1. Section Description

Each enterprise will have private structure of department or division to serve statistical work and employee management. The organizational structure of an enterprise is divided into several levels. These organization level will be created by users in the order of the First Level -> the Second Level -> Level ... n

Example: (figure IV.2.1)

- The first level: Factory 1, Factory 2, Factory 3....
- The second level: Area 1, Area 2...This organization level belongs to the first level.
- The third level: Department 1, Department 2, ...This organization level belongs to the second level.
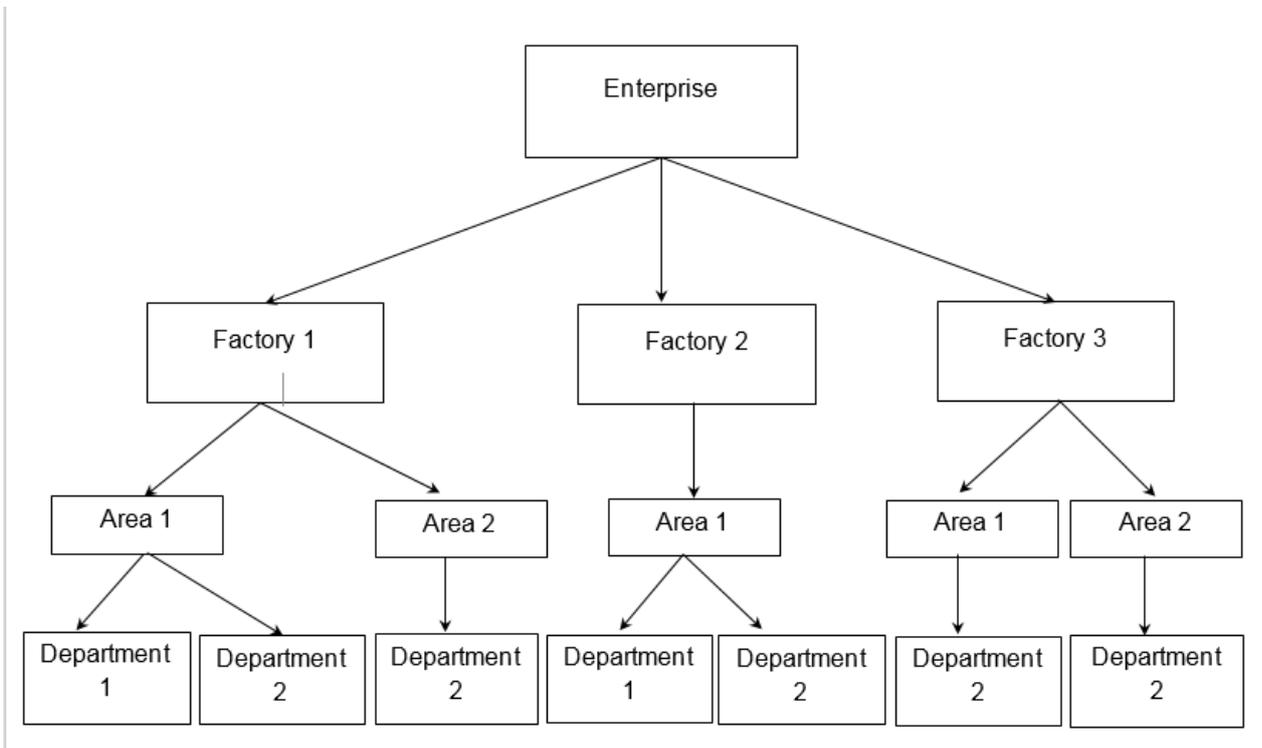
IV.2.1

2.2. Implementation Instruction:

2.2.1. Guide to create, adjust the FACTORY

a. Guide to create new factory

Follow the steps: (1) In the Taskbar, choosing -> (2) Typing the Factory information in the toolbar -> (3) Click Save.

Once create successfully, the data will be displayed as in Figure IV.2.2.
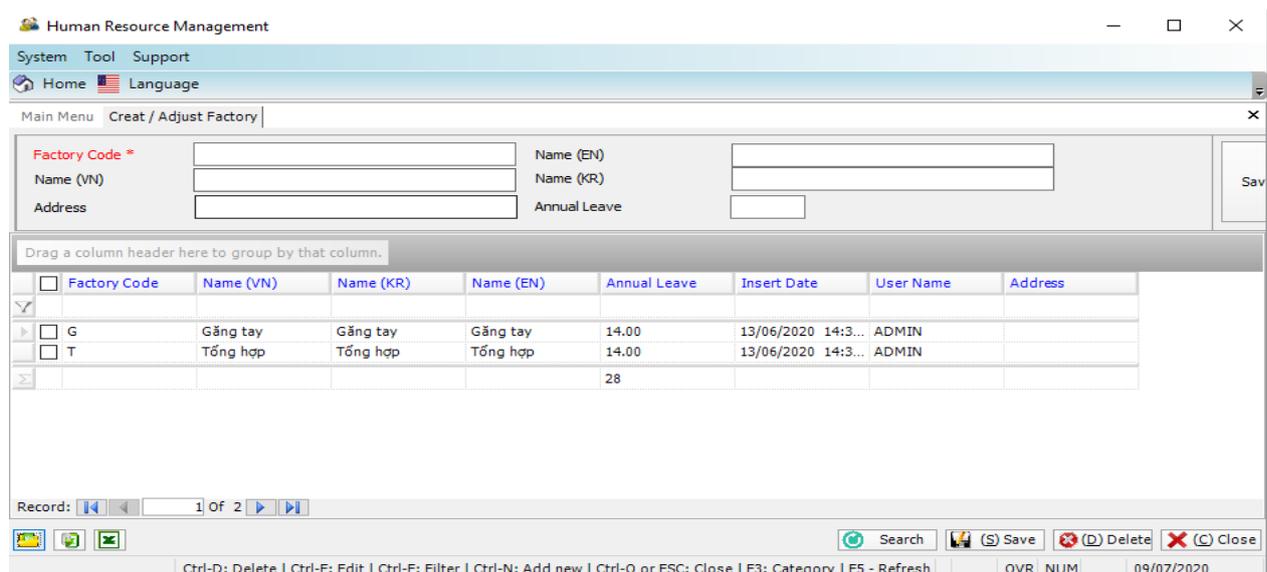
IV.2.2

b. Instructions to edit, delete and export data

To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

2.2.2. Guide to create, adjust the AREA

a. Guide to create new area

Follow the steps: (1) In the Taskbar, choosing [Create/Adjust Area] -> (2) Typing the Area information in the toolbar -> (3) Click Save.

Once create successfully, the data will be displayed as in Figure IV.2.3.

IV.2.3

b. Instructions to edit, delete and export data
To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

2.2.3. Guide to create, adjust DEPARTMENT, GROUP (TEAM)

Perform the same as creating, adjustment the AREA.

3. The Create / Adjust Position Item
3.1. Item Description
This item manages the positions of Staff, Workers, Managers…in the company

3.2. Implementation Instruction
a. Guide to create new Position:

In the Taskbar, choosing [Create/Adjust Position].

Create data according to the instructions in section **II.2**. Once created successfully, the data will be displayed as Figure IV.3.1.
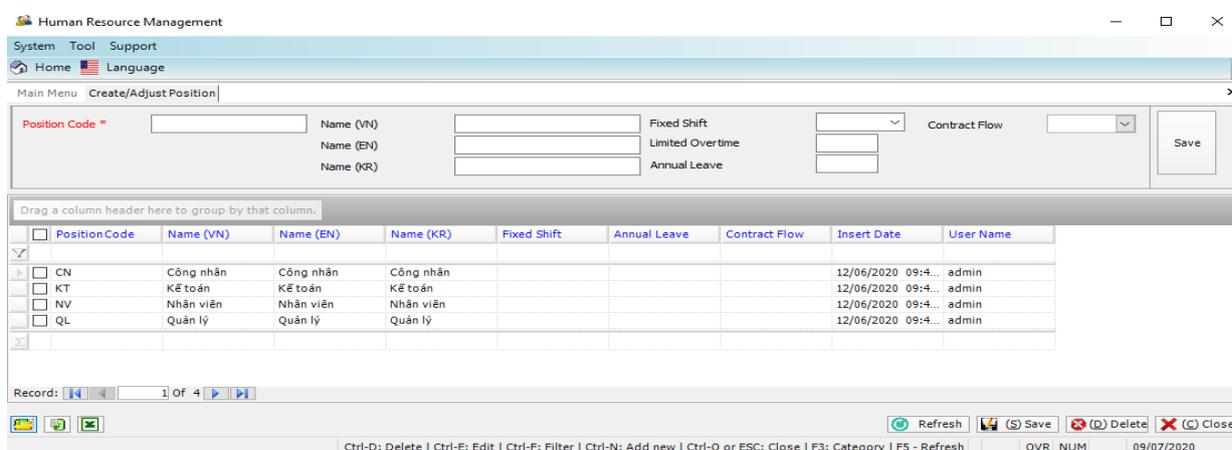
IV.3.1

b. **Instructions to edit, delete and export data**
      To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

4. The Create / Adjust Position Type Item
4.1. Item description
This item has the same meaning and usage as the above Position Item. Types of positions such as IT, Accounting, Admin …

4.2. Implementation Instruction
   a. **Guide to create New data**

In the Taskbar, select Create/Adjust Type of Position .

Create new data according to the instructions in section **II.2**. Once created successfully, the data will be displayed as Figure IV.4.1.

IV.4.1

   b. **Instructions to edit, delete and export data**
      To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

5. The Create/ Adjust Job Titles Item
5.1. Item description
This Item uses to classify titles in offices, or factories …

5.2. Implementation Instruction
   a. **Guide to create new data**

In the Taskbar, select Create/Adjust Job Titles

Create new data according to the instructions in section **II.2**. Once created successfully, the data will be displayed as Figure IV.5.1.

IV.5.1

b. **Instruction to edit, delete and export data**

To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

6. The Create/ Adjust Labor Contract Item

6.1. Item description

This Item manages the list of contract types such as probationary contract, one-year contract, permanent full-time labor contract, contract appendix …

6.2. Implementation instruction

a. **Guide to create new data**

In the Taskbar, select .

Create new data according to the instructions in section **II.2**. Once created successfully, the data will be displayed as Figure IV.6.1.
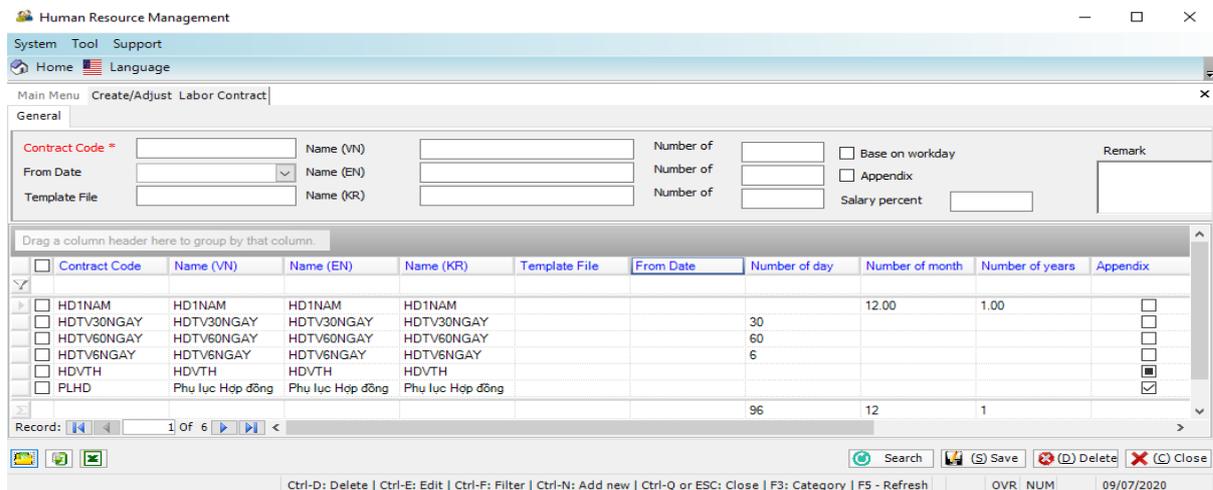
IV.6.1

b. **Explanation:**

- From date: Effective date of a labor contract type.

- Number of days; months; years: Effective period of labor contracts.
- Annex: tick here if there is appendix of the labor contract.
- Working days: tick if the labor contract is short-term type. For Example: the 6-days labor contract type only calculates the actual working days excluding Sundays or state holidays …
- Percentage of salary: this can be blank if the labor contract is a one-year, two-year or permanent full-time.

   c. Instruction to edit, delete and export data
   To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

7. The Create/ Adjust Contract Process Item

7.1. Item description

This list manages Contract Processes and supports users to create new ones by themselves. Although some contract processes is available in the software, depending on the enterprise requirements, users can create more the contract processes and apply to employees after recruitment.

7.2. Implementation Instruction

   a. Guide to create the Contract process

In the Taskbar, select **Create/ adjust contract process** .

Create the new contract process according to the instructions in section **II.2**. Once created successfully, the data will be displayed as Figure IV.7.1.
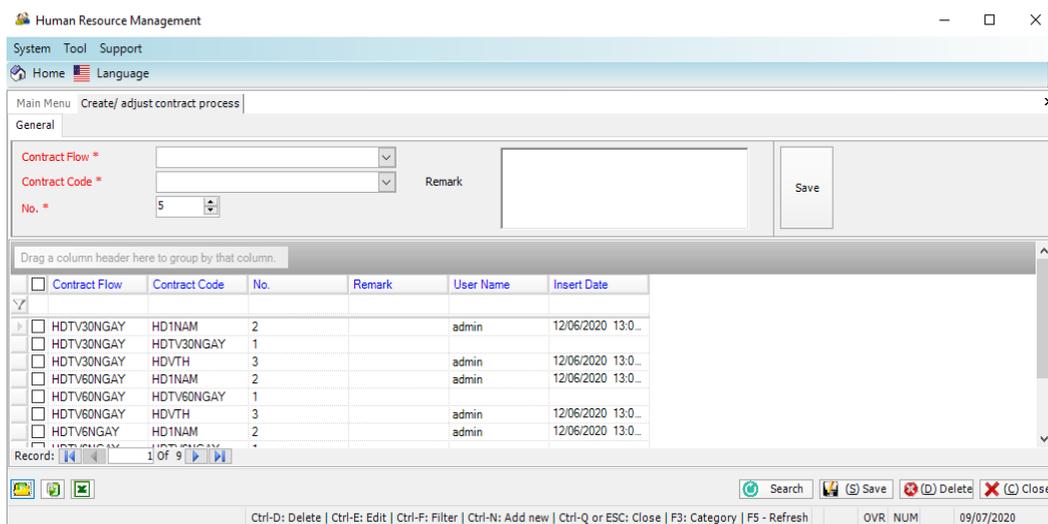
IV.7.1

   b. Explanation
- Contract process: Select code of contract process. If create new, can typing directly.
- Contract code: Select contract code (already created in section IV.6).
- No.: Select the priority of which contract to sign first and which contract to sign later.

   c. Implement to edit, delete and export data
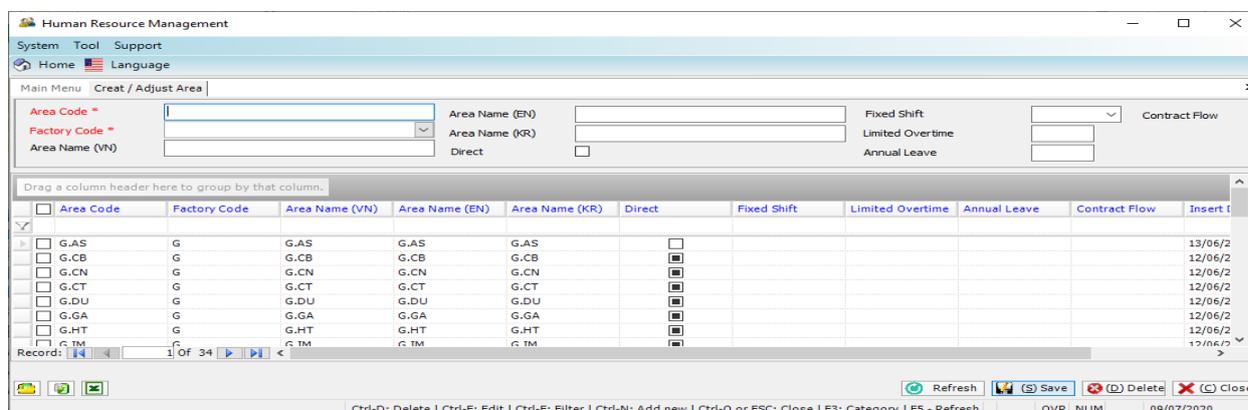   To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

8. The Create/ Adjust leave type Item

8.1. Item description

This Item uses to register the leave for employees: annual leave, sick leave, and maternity …

8.2. Implementation Instruction

a. Guide to create new data

In the Taskbar, select item ![Create/Adjust Leave Type] .

Create the new leave types according to the instructions in section **II.2**. Once created successfully, the data will be displayed as Figure IV.8.1.

IV.8.1

b. Explanation:

- Leave type: Enter code of leave type.
- Salary; Without salary; Insurance; annual leave; Miscarriage; Antenatal check-up …: tick the information depends on the type of leave.
- No approvement: Applies to the absent case without superior approval
- Number of months, days: The maximum period of leave is allowed when registering the respective leave type. For example, maternity leave is only approved 06 months maximum.

c. Implementation to edit, delete and export data

To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

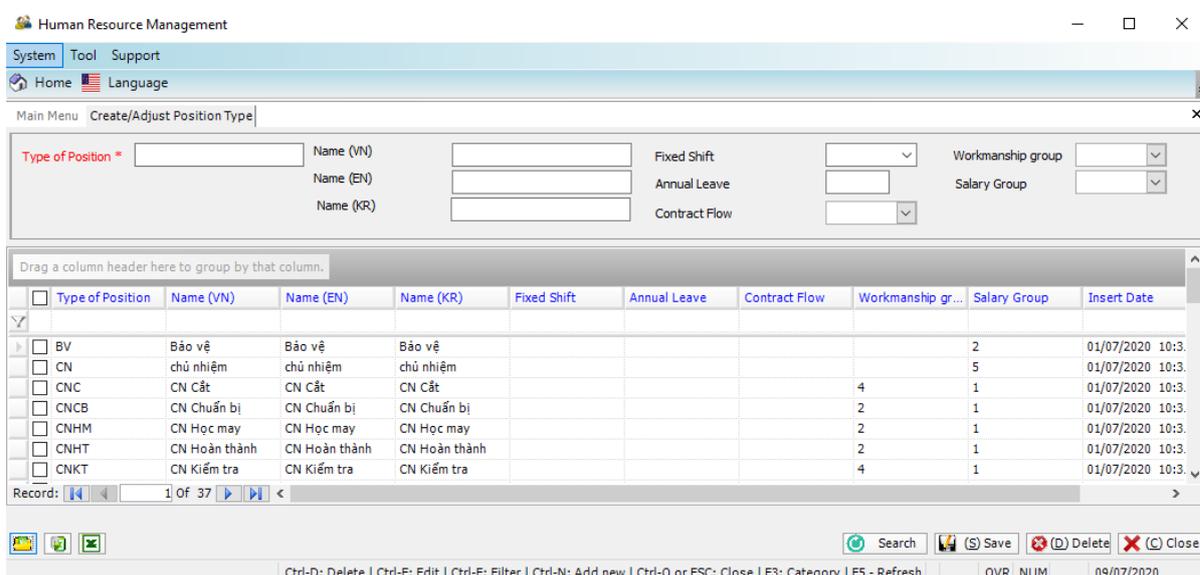## 9. The Create/ Adjust Regions Item

9.1. Item description

This Item manages the data on:

- Ethnic groups: Kinh, Tay, Muong…
- Address: Commune, Ward, District, Province, City

9.2. Implementation Instruction

a. Guide to create new data

In the Taskbar, select item ![Create/Adjust Regions] .

The software has available information in accordance to the insurance standards. In case of new additions, Excel Data Creation Method will be used (Data Creation Guide - Part II.2.3).
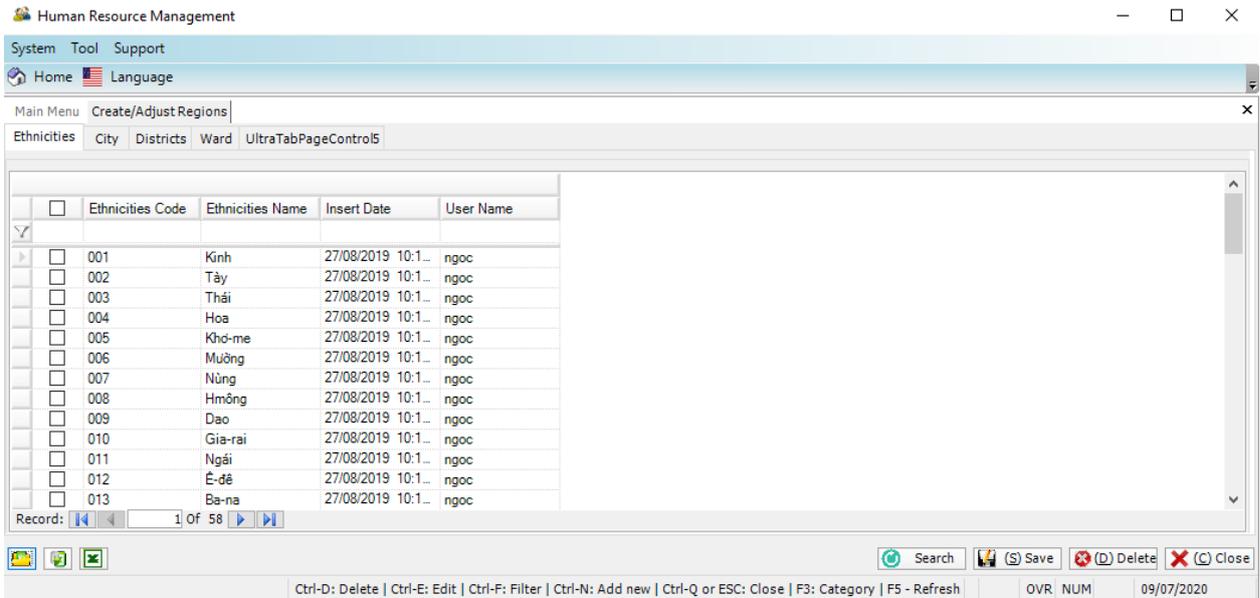
III.8.1

b. **Implementation to edit, delete and export data**

To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

10. The Create/ Adjust Hospital Item

10.1. Item description

This item manages and supports users to register the new insurance medical examination place for their employees. Although the Software has built-in information on medical examination places in accordance to State regulations, depending on the enterprise requirements, users can create more.

10.2. Implementation Instruction

a. **Guide to create new data**

In the Taskbar, select item .

Create new data according to the instructions in section **II.2**. Once created successfully, the data will be displayed as Figure IV.10.1.
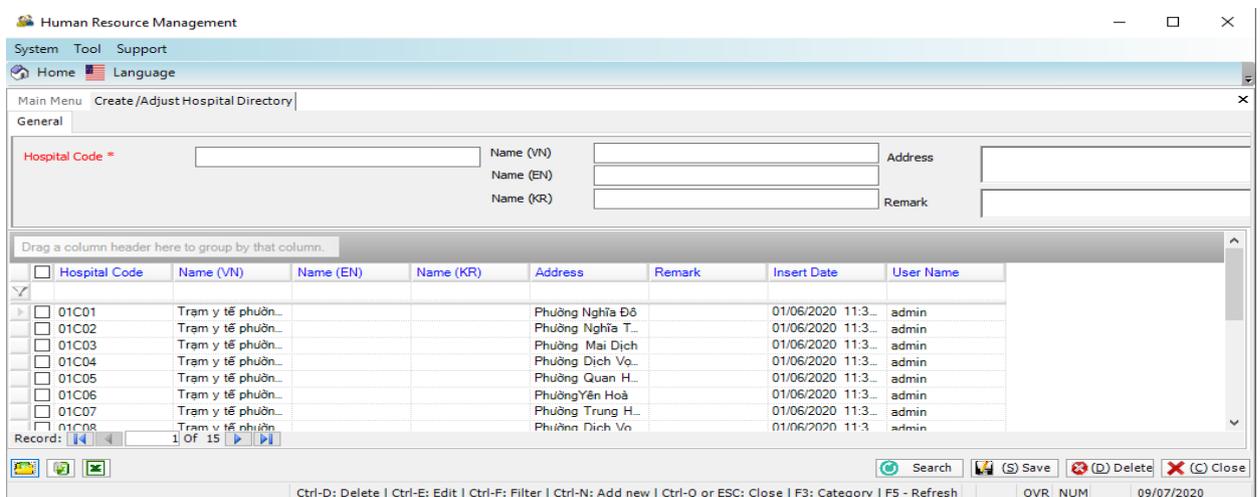
IV.10.1

b. Implementation to edit, delete and export data
To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

Notice: Codes of provinces, cities and hospitals follow the State's codes.

11. The Create/ Adjust Hazards Item

11.1. Item description

Each employee will have a hazards code corresponding to the job for enterprise classify and provide the suitable regime.

11.2. Implementation Instruction

a. Guide to create new

In the Taskbar, select item ![icon] Create/Adjust Hazards .

Create new Hazards code according to the instructions in section **II.2**. Once created successfully, the data will be displayed as Figure IV.11.1.
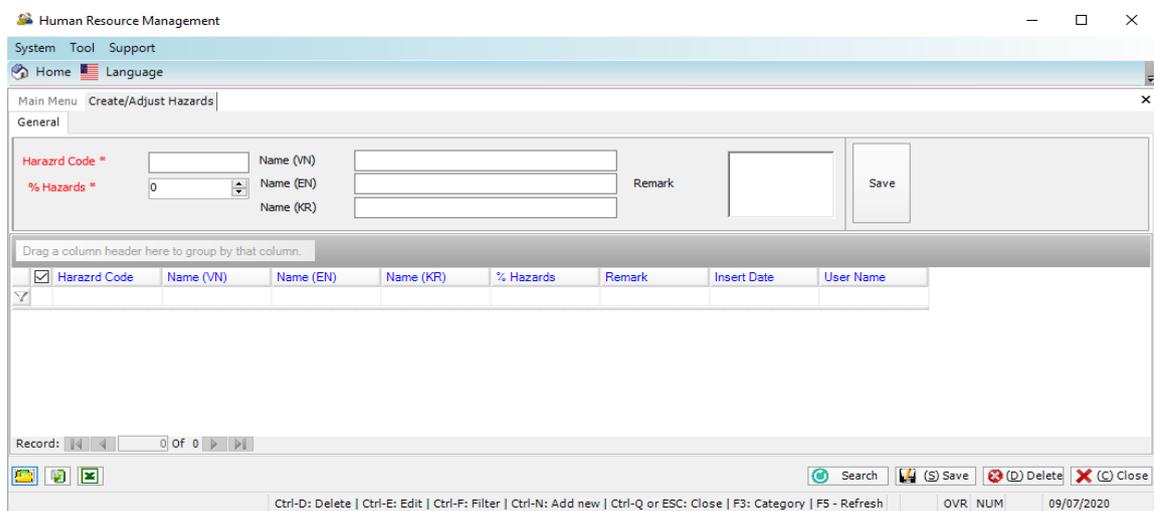
IV.11.1

b. Explanation
- Hazards percentage: The enterprise assesses the hazardous level to calculate allowances for employees based on this ratio. For example: The hazards percentage is 5 - that means, the employee's hazards allowance will be equal to 5% of the salary under to the company regulations.

c. Implementation to edit, delete and export data
To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

12. The Create/ Adjust Job Code Item
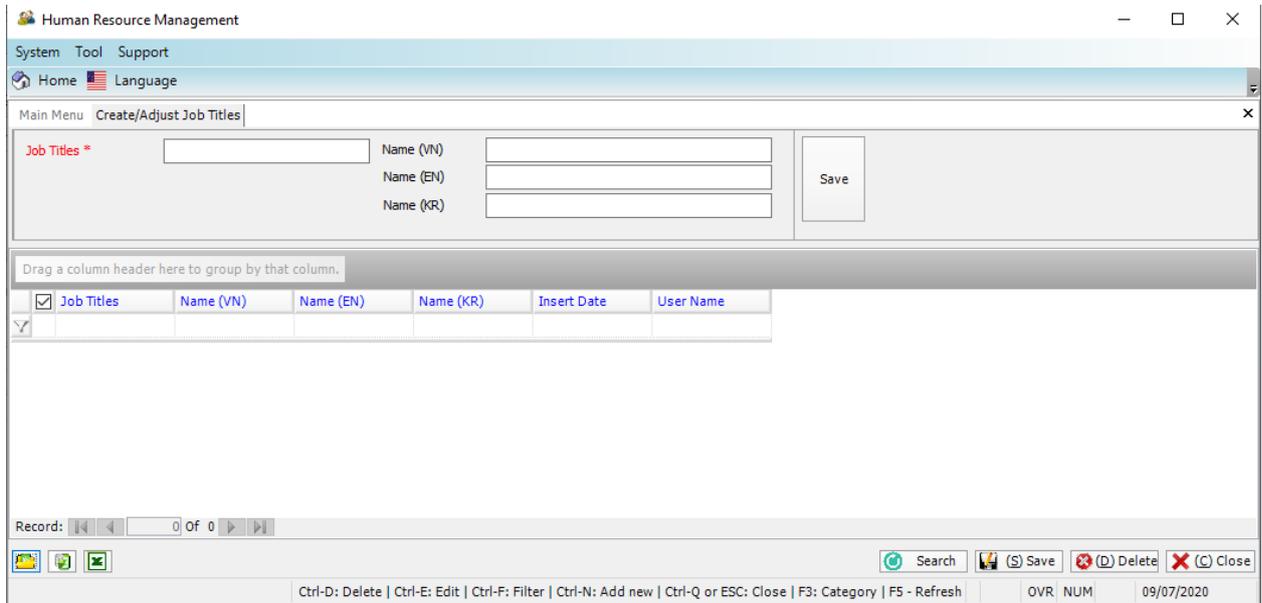
12.1. Item description

The creating of the Job Code has the very important role because it will be the basis for building, managing and calculating salaries for employees. Each enterprise will have the rule for creating their Job Code based on enterprise management purpose. Each employee will have a job code corresponding to the job they are doing.

12.2. Implementation Instruction

a. Guide to create new Job Code

In the Taskbar, select item ![Create/Adjust Jobcode] .

Create new Job code according to the instructions in section **II.2**. Once created successfully, the data will be displayed as Figure IV.12.1.

IV.12.1

   b. **Explanation:**
-   Job Code: Typing the Job Code as required by the company.
-   Hazards: Select the hazards ratio corresponding to the job.

   c. **Implementation to edit, delete, and export data**
       To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**
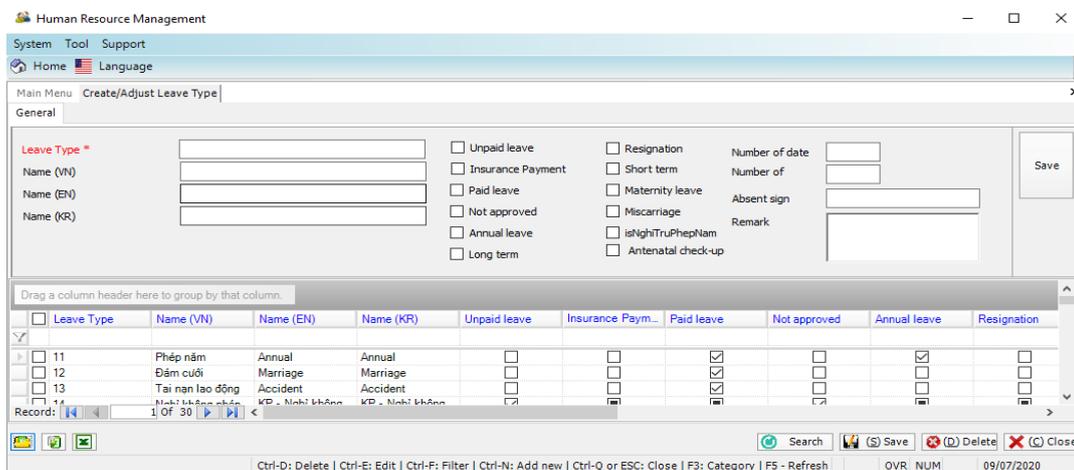
13. The Users List Item

13.1.   Item description
This item manages the software users list and set up the data access permission to users

13.2.   Implementation Instruction
   a. **Guide to create new**

In the Taskbar, select item ![List Of User] -> Click the button ![Add new] -> Typing the user information into the dialog box as in Figure IV.13.1 -> Click **Save**.

IV.13.1

After completing the information, the data will be displayed as Figure IV.13.2.

IV.13.2

b. Guide to edit
- Step 1: In data grid, tick the line is required to editing (figure IV.13.2)
- Step 2: Click button [Edit]
- Step 3: Edit the information on the dialog box.
- Step 4: Click **Save** to save the new information.

c. Explanation information in data grid:
- Manager: the users is the management level. This level can view and permit access to users at the subordinate level. The default management is admin.
- User name: name of user log in the software.

IV.13.3

- Password: password to Login the software
- Name: full name of user.
- Group: Using to group users according to certain criteria of each company.
- Access permission: Using to permission the data access for the first level. Example: figure IV.13.2, the account name **bich** and **huong** only permit access to employee list belong to factory X01; the account name **tham** only permits access to data of factory X03, X05, TV03, TV05...

14. The Register User Permission Item

14.1.   Item description

This Item has function to registration the using permission for users.

14.2.   Implementation Instruction

In the Taskbar, select **Register User Permission** , figure IV.13.1 is the interface of this Item.
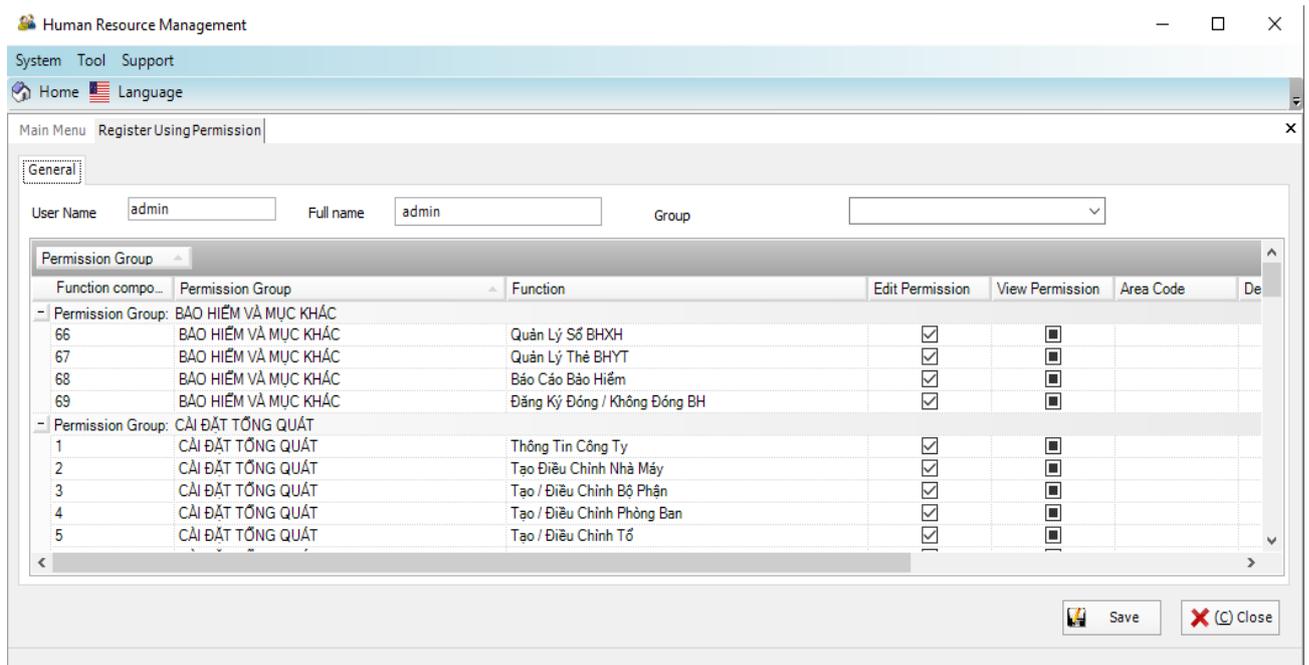
IV.13.1

a. **Steps required to setup user permission**

Step 1: Select the user that needs permission in the USER LIST section.

Step 2: Tick in to the EDIT, VIEW.

Step 3: Click **Save** to save user right.

b. **Explanation**

- List of users: display list of all current users
- Permission Group: is the group of modules (indicate in red line box No. 1 in figure IV.13.2).
- Functions: is the group of items and functions of the software (indicate in red line box No.2 in figure IV.13.2).
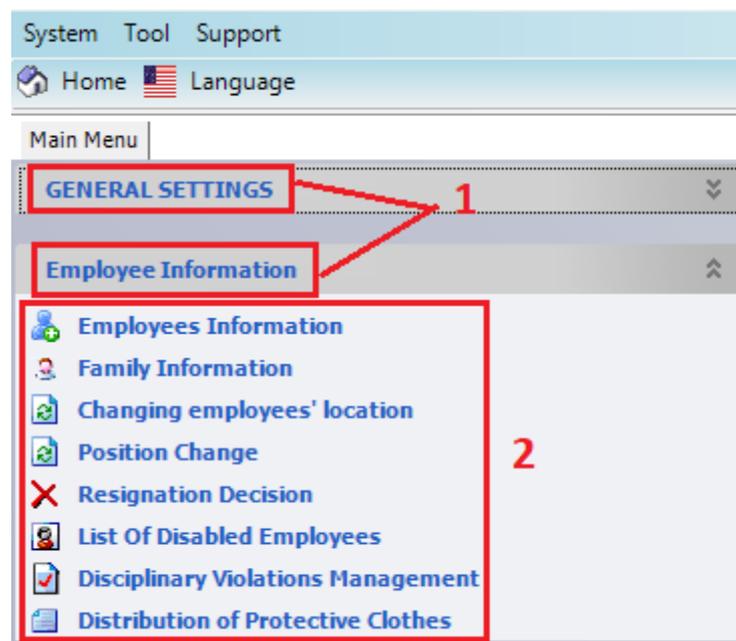
IV.13.2

- EDIT: Permission to view and edit data.
- VIEW: Permission to view but not allowed to edit data.
- TABLIST: Using to setup permission by tab. If left blank, this user has authority to the entire tab in the interface. For example (Figure III.13.3): the interface includes tabs: General, Input New employee, Utilities
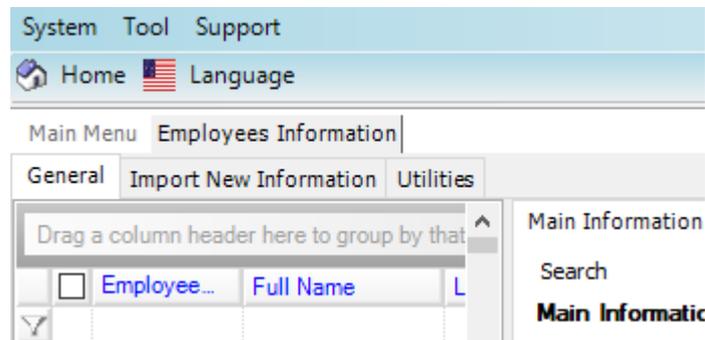
IV.13.3

15. The Item of Create/ Adjust holiday or leave

15.1.　　Item description

This Item manages the annual holiday or leave schedule according to State regulations or specific regulations of the company.

15.2.　　Implementation Instruction

a. Guide to create new

In the Taskbar, select .

Create new data according to the instructions in section **II.2**. Once created successfully, the data will be displayed as Figure IV.15.2.
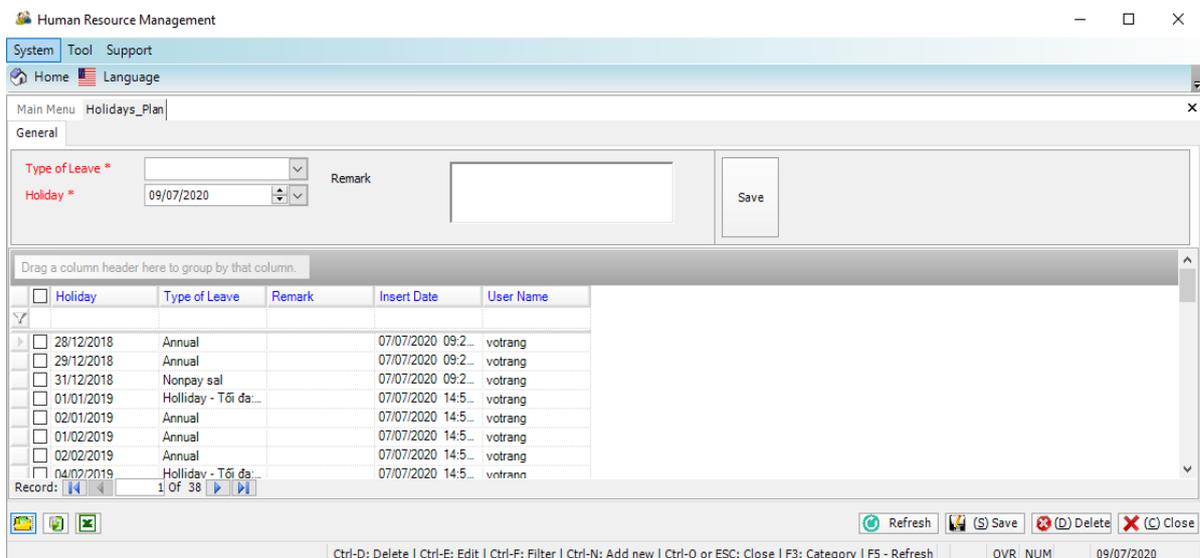
IV.15.1

b. Implementation to edit, delete, and export data

To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**
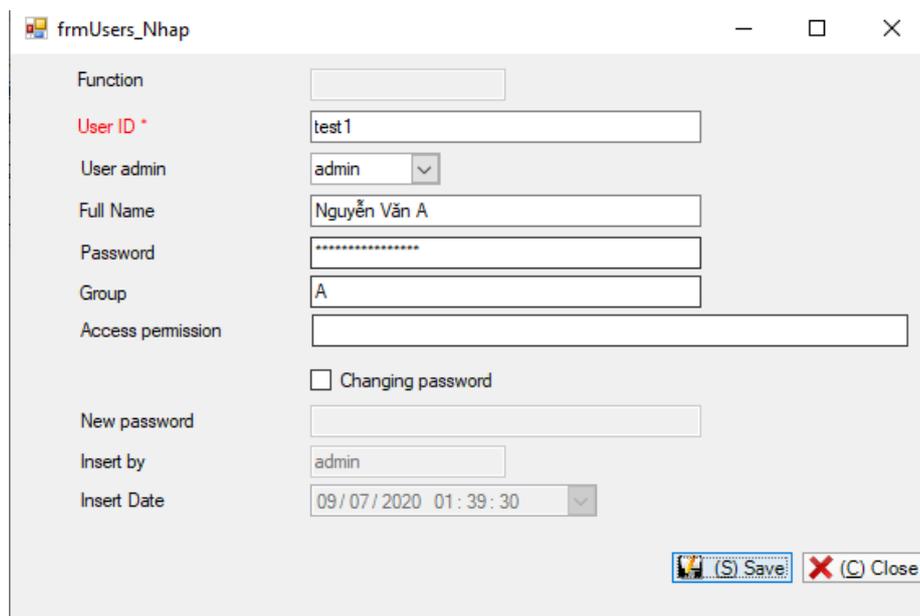
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16. The Item of Create/ Adjust working shift for the company

16.1.   Item description

This section explains how to set up a Shift for the company.

16.2.   Implementation Instruction

a.   Guide to setup the shifts

In the Taskbar, select item **Create/Adjust Working Shift**

Create new data according to the instructions in section **II.2**. Once created successfully, the data will be displayed as Figure IV.16.1.
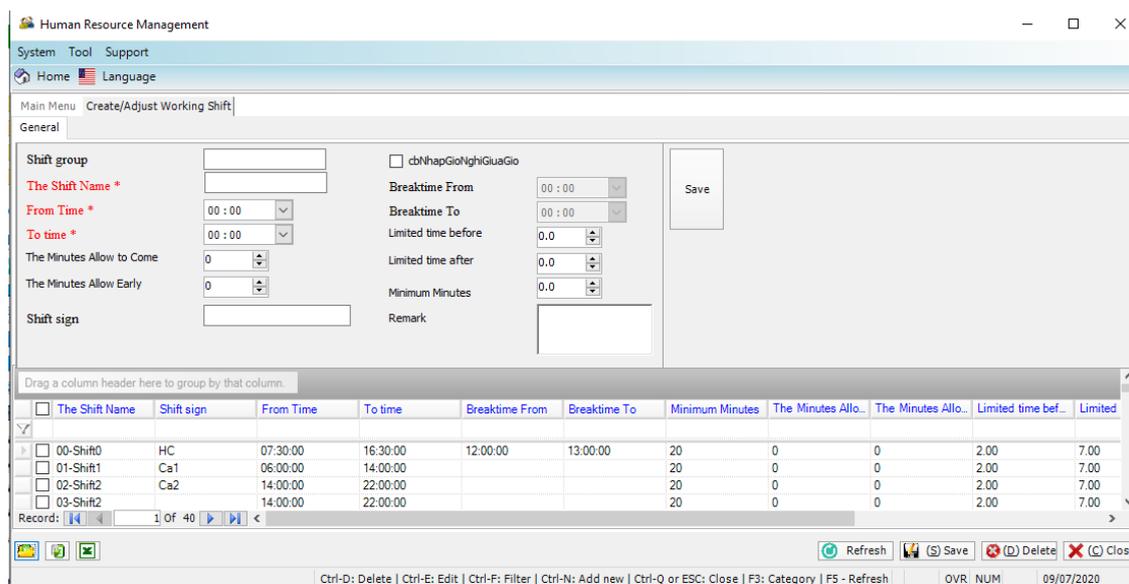
IV.16.1

b.   Explanation:

- The shift code: is prescribed to give a name as follows: "** - Shift *": ** is the numeral and shift * is the shift group and separated by a -
- Symbol: will display on the report which has the shift registration instead of the Shift code, this symbol will vary depending on each company. For example, an administrative shift is named as HC by the company, yet other company names it as Ca1.
- From time; To time: Time starts a shift and time finishes a shift.
- Breaktime from; Breaktime to: Breaktime of a shift.
- Minimum minutes: the minimum value that employees must to work in a shift to be counted for timekeeping. For example: Minimum minutes is 60. That means: If an employee works only 55 minutes, timekeeping will not be counted for that 55 minutes.
- Minutes allow late coming; Minutes allow early leaving: The time that employees come late and leaves early but it still counts working on time.
- Limited time before starting shift; Limited time after shift ending: this is a timeline; the software gets timekeeping data for that shift based on this timeline.
  For example: The working hours of a shift is from 07:00 to 16:00; Select the Limited time before starting shift is 2 hours; Limited time after shift ending is 6 hours. If the employee registers to work in this shift, the software will get timekeeping data from 05:00 to 22:00 for that employee's timekeeping calculation.

c.   Implement to edit, delete and export data

To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

V. EMPLOYEE INFORMATION MANAGEMENT MODULE

1. The Employee Information Item

1.1. Item description

This Item uses to manage the basic employee information and administrative reports. This Item has the following data tabs:

- General tab: Display the employees' information and administrative reports.

- Input new employee Tab: Using to creating new employee information.

- Utilities tab: Utilities support updating the employee information, changing the employee code …

1.2. Implementation Instruction

In the Taskbar, select the item **Employees Information** .

1.2.1. Input new employee Tab

This tab uses to create new employee information in the software. (Figure V.1.1)

V.1.1

a. **Instructions for creating the new employee information:**
- Method 1: Typing employee information directly on the data grid (fill in the red framed section) -> Click the SAVE button to save the data.
  Noted:
  - Columns with the red headers should not be blank: Employee code; Full name; Date of birth; Gender; ID number; date of starting work.
  - Address column: Input data in the format: House number, lane/hamlet – Ward/ commune - District – City/ province.
  - Date of Birth column: The software supports to typing under 03 formats:
    - ✓ dd / MM / yyyy: The employee has full information of date, month, year.
    - ✓ MM / yyyy: The employee only has information of month and year.
    - ✓ yyyy: The employee only has information of the year.
- Method 2: Get employee information data from Excel file template
    Following to the instruction in section II.2.3.
  b. **Instructions to edit, delete and export data**
    To edit, delete and export data to Excel file, following to the instructions in section **II.3, II.4, II.5, II.6.**
  #### 1.2.2. General Tab

This tab shows the details employee information. This tab consists of 2 parts: The grid on the left of the screen and the **Main Information** Tab occupied the majority space of the screen.

- The grid on the left of the screen shows the employee list or some data of the reports.

- **Main Information** Tab shows details of employee information. Method displays employee information:

• Method 1: Typing the employee code or ID number in the Search box -> Click the Search button.

• Method 2: Click inn the line on the grid (Figure V.1.2).
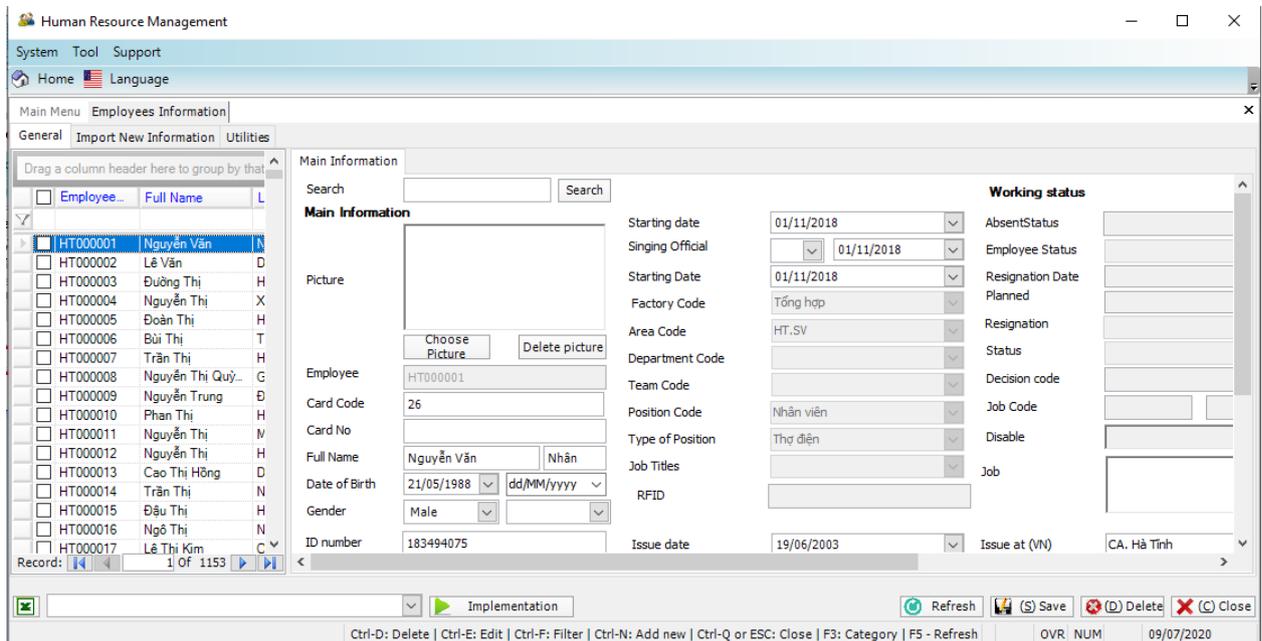
V.1.2

a. **Instruction to edit data**

   Edit the data directly into the cells in the **Main Information** tab, then click the **Save** button to save the data.

b. **Instruction to delete data**

   Tick into the employee needed to delete on the left grid, then follow the instructions in section II.4.

c. **Instruction to export data**

   Following to the instruction in sections II.5 and II.6

d. **Reports explanation and instructions for using some special functions**

- Employee list: This report displays all employee information including working, leave and resignation.
- Working Employees list: This report shows a list of the working employees and excluding leave.
- List of working and leave: This report shows a list of the working employees and including leave.
- Newcomers list: This report shows a list of new employees who start working in the period of time.
- List of employees resigned: This report shows a list of employees who quit their jobs in the period of time.
- Application for changing location: Print an application to move to a new working location.
- Printing employees' card: Instructions for Printing (Figure V.1.3):

  Step 1: Select the employee need to print the card on the grid
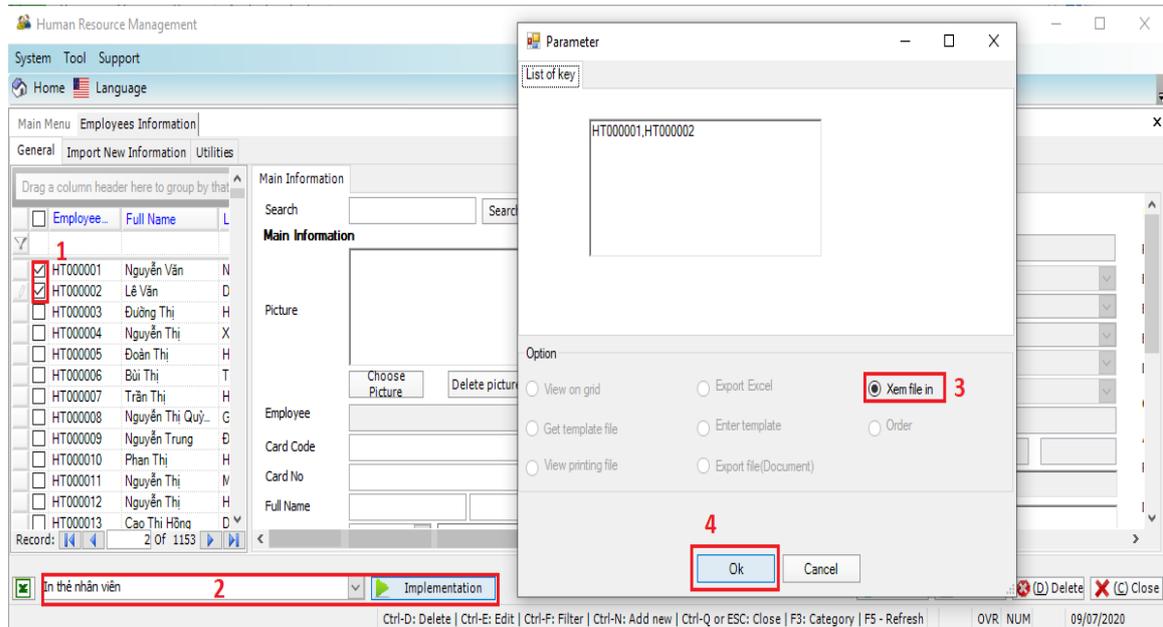
V.1.3

Step 2: In the **Function Box**, Select **Print employee card** and press the **Implement** button

Step 3: Select **Preview print file**

Step 4: Click the **OK** button to preview (shown in Figure V.1.4)

Step 5: Click the print icon to print a card.
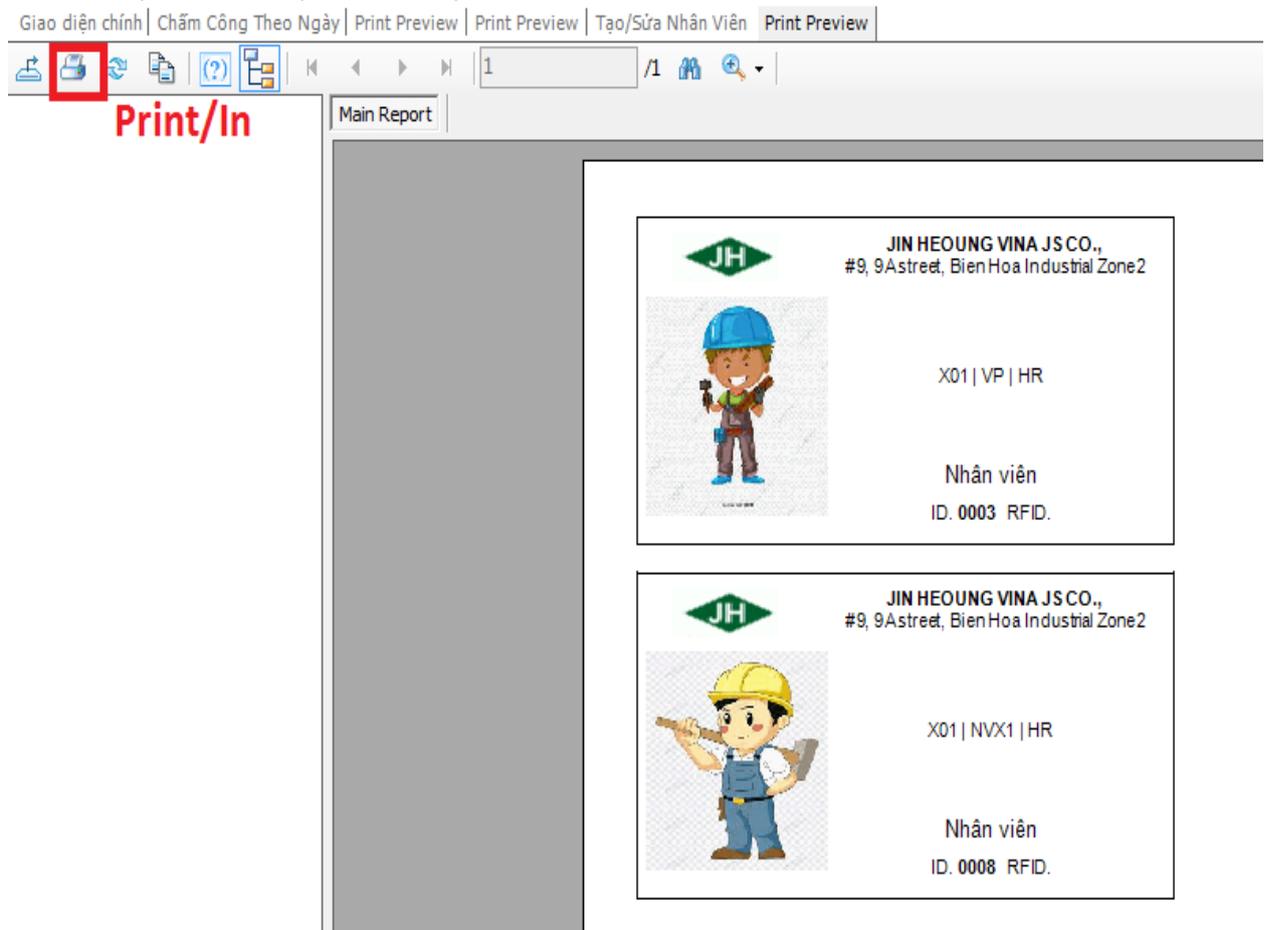
V.1.4

e.   **List of other reports**

- List of new employees.
- List of resignation employees
- List of birthday employees.

1.2.3. Utilities tab

This tab supports some utilities such as: Changing employee code, updating employee data from Excel, updating the big amount of employee photos
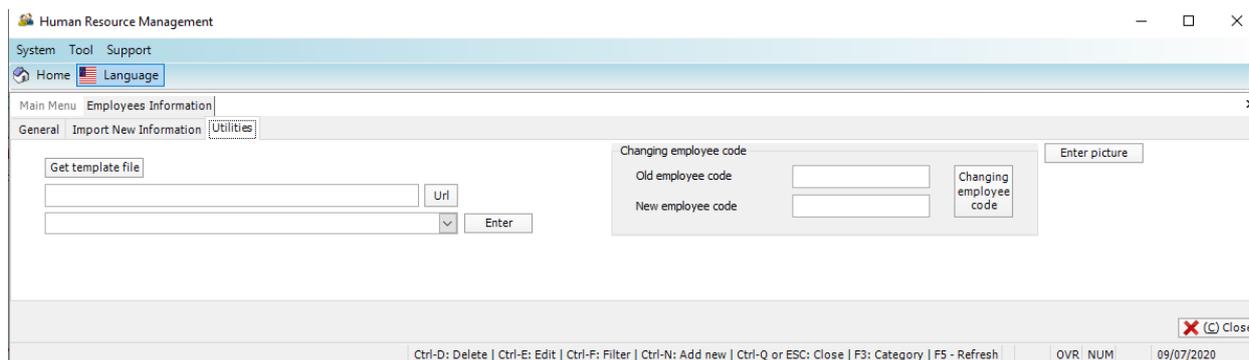
a. Utility to change employee code

Be used in case user want to edit the Employee Code (Figure V.1.5). Typing the old code and new code then click CHANGE CODE to proceed.
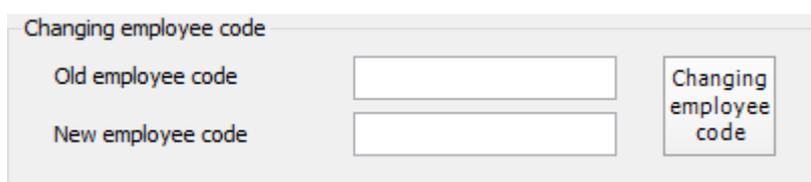
V.1.5

b. Utility to update data by employee code

Use this utility when user want to edit or add information to 1 or all employees in the enterprise.

For example: Additional temporary address for employees, follow these steps:

- Step 1: Click the GET TEMPLATE button to get the Excel file template.

- Step 2: Typing the new information or edit the old information in the sample file (Figure V.1.6).

Noted: Typing only 1 type of information in the VALUES column in one time of edit or addition of information

	A	B
4		
5	Template cập nhật thông tin nhân viên	
6		
7	MÃ NV	GIÁ TRỊ
8	0009	TP.HCM
9	0010	TP.HCM
10	0012	TRÀ VINH
11	0011	TRÀ VINH
12	0019	VĨNH LONG
13	0069	TÂY NINH
14	0072	VĨNH LONG

V.1.6

- Step 3: Click the URL button and then choosing the file was filled in at step 2 (Figure V.1.7).

C:\Users\Admin\Desktop\TempCapNhatThongTinNhanVien.xlsx   Url

V.1.7

- Step 4: Select the input data is Temporary Resident (TV) -> click ENTER button to input data into the software (Figure IV.1.8).

Temporary Resident (TV)   ∨   Enter

V.1.8

c.   Utility to update photo for employees

To update photos for employees, follow these steps:

- Step 1: The image is given name according to employee code and store all images in the same folder. (Figure V.1.9)
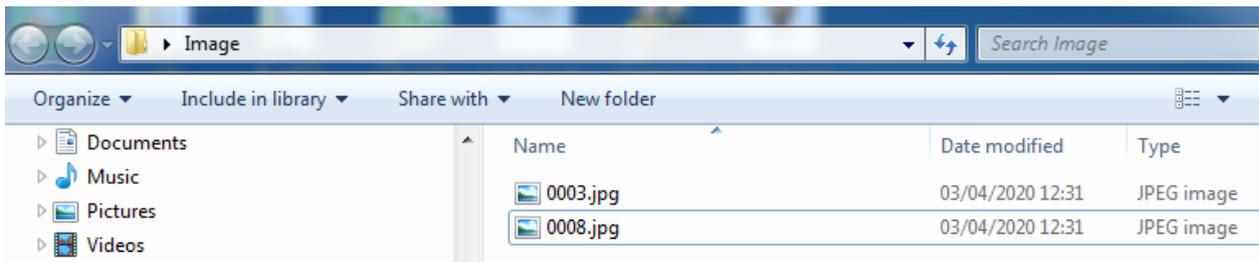
V.1.9

- Step 2: Click button [Enter picture] then finding the image storage folder, after that selecting the image to import as shown in Figure V.1.10.
- Step 3: Click OPEN button to execute the order or click the CANCEL button to cancel.
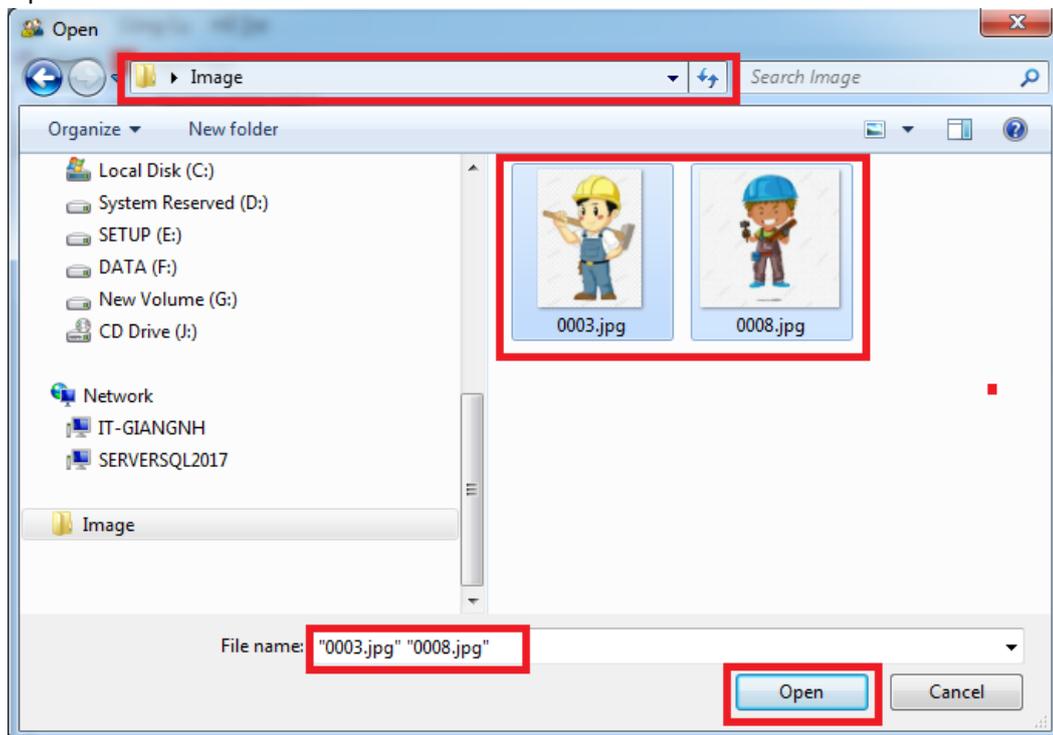
V.1.10

2.   The Item of Family Information and Employees enjoy the baby regime

2.1. Item description

This Item manages the employee's relatives' information such as children, parents, etc.

2.2. Implementation instruction

a.   Instructions to create data:

In the Taskbar, select ![Family Information icon] **Family Information** .

Creating information follows to the instructions in section II.2. After creating, the data will be displayed as Figure V.2.1.
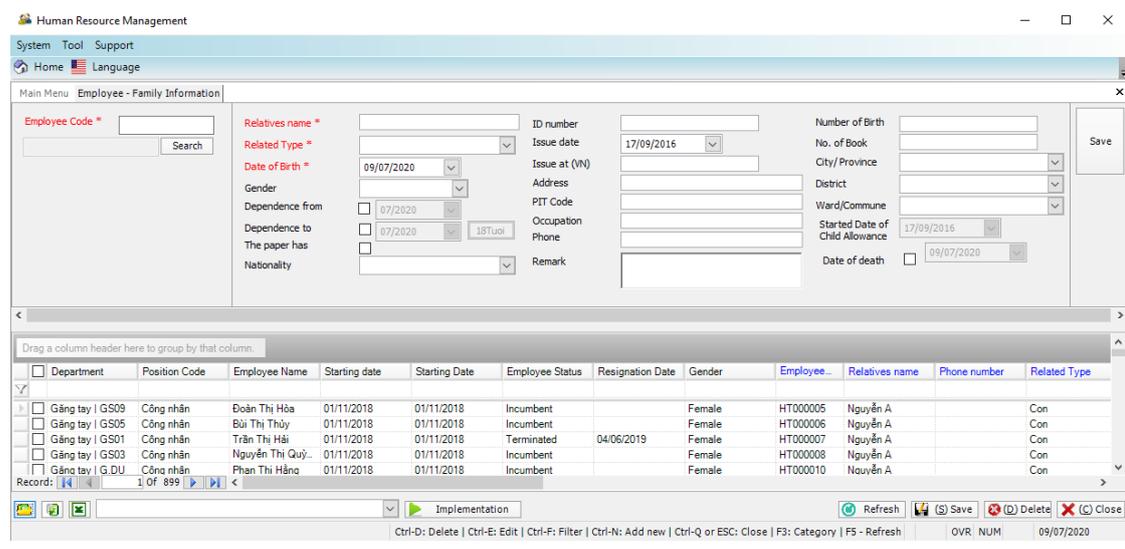
V.2.1

b. Explanation.
- Submitted Paper: This column confirms information.
- Baby-care day: The starting date is counted to receiving the regime of the baby under 6 years-old.

c. Instructions to edit, delete and export data

To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6**.

d. Instructions to use some special functions

- Print the early leave card: This function uses to print the card for the employees enjoy the regime who take care baby under 1 year old. To print the card: Select the Report of **Small children under 1 year old (Female employees)** in the Function box -> Then following to the instructions in V.1.2.2.d. Early leave card will be shows as Figure V.2.3
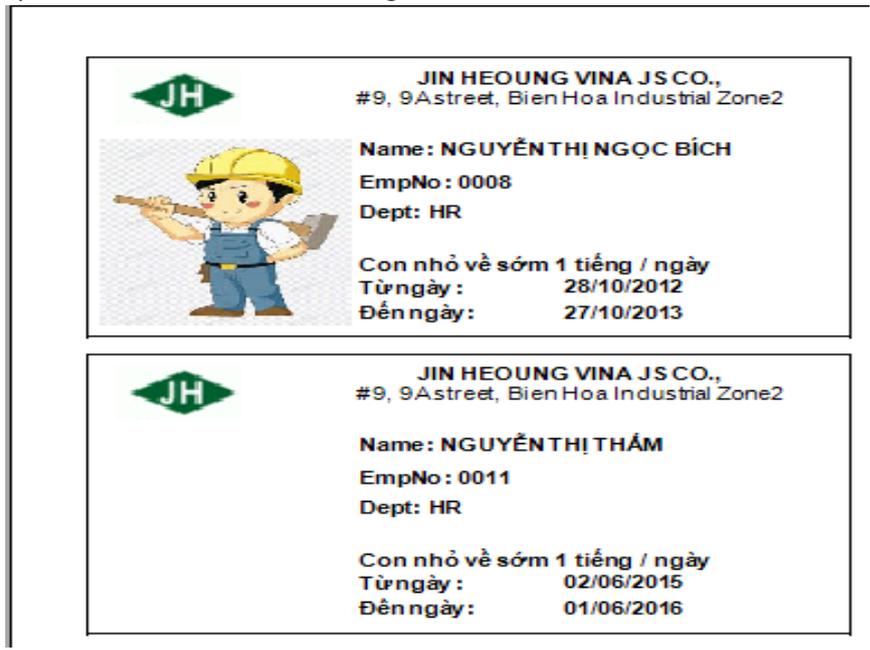
V.2.3

e. List of other reports
- See all employees.
- List of dependents.
- List of children under 1 years-old (Female employees).
- List of children under 6 years-old (Female employees).

3. The Item of Changing employees' location between Departments/ Groups…

3.1. Item description

This Item uses to manage the working location and the history of location changing from the start working day until to the current of employees.

3.2. Implementation Instruction

a. Instruction of location change

In the Taskbar, Select [Position Change] -> Typing the data on the toolbar -> Click the **Import** button -> Click the **Save** button to save the location changing information.

V.3.1

b. Explanation:
- Location: Select new locations by factory, area, department.
- Job code: the job code is created in section IV.12.

c. Instructions to edit, delete and export data
To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6.**

d. Instructions on how to display the history of location changing
First, Typing the Employee Code -> click the button [Search] -> The history of location changing of the employee will be displayed on the data grid (Figure V.3.2).
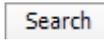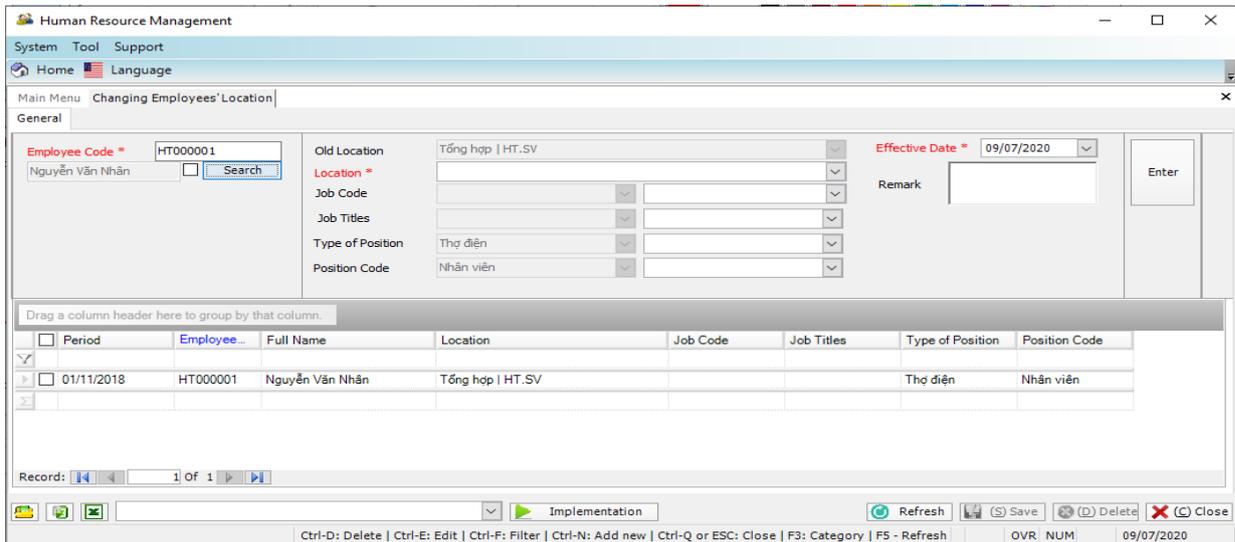
V.3.2

e. List of reports

- List of the detailed location changing
- List of the general location changing.

4. The Item of Position change

4.1. Item description

This Item uses to manage the positions and history of position changing from the start working day until to the current of employees.

4.2. Implementation instruction

a. Instructions to change position

In the Taskbar, Select Position Change .

To change the position, follow the instructions in section **II.2**. After finishing to input, the data will be displayed as Figure V.4.1
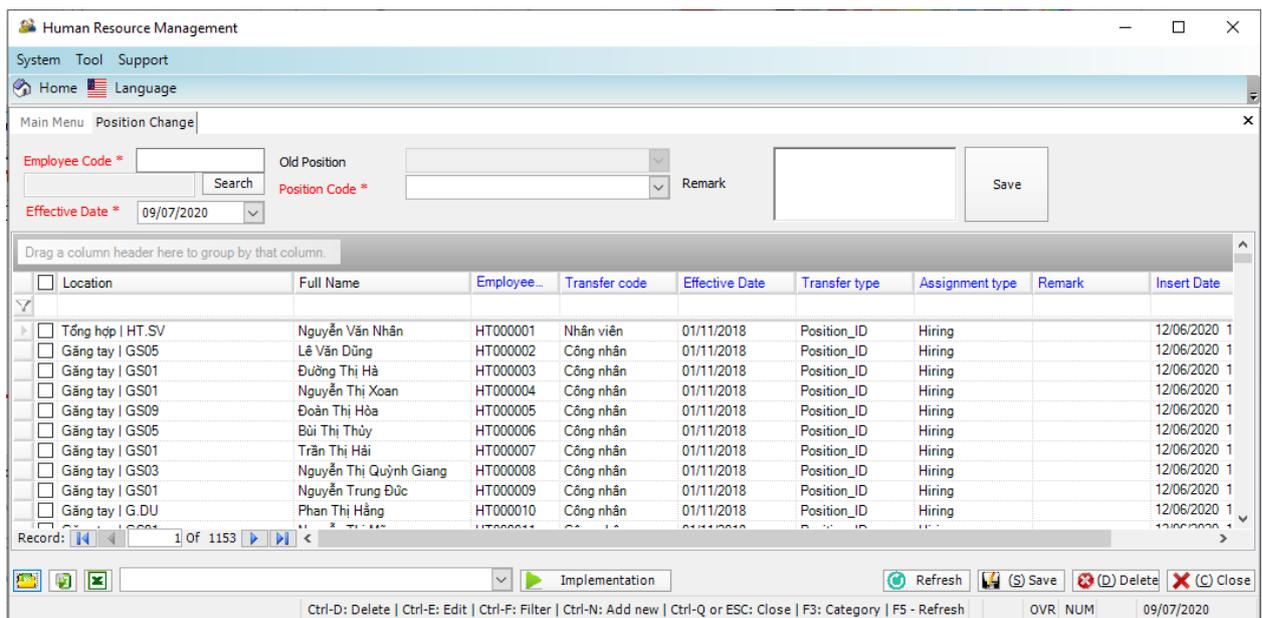
V.4.1

b. Instructions of edit, delete and export data

To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6.**

c. List of reports

- List of the position changing

5. The Resignation Item

5.1. Item description

This Item uses to create and manage the resignation and dismissal decisions.

5.2. Implementation instruction

a. Instruction to create the decision

In the Taskbar, Select | ✕ **Resignation Decision** | .
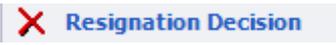
To make a decision of resignation, follow the instructions in section **II.2**. After creating, the data will be displayed as Figure V.5.1 .

V.5.1

b. Explanation

- Status: is the status of the resignation decision. Including 3 status: Approvement, Cancel, Plan.
  - Approvement: Approval for Resigned contract.
  - Cancel: Cancel the decision of resignation/ dismissal.
  - Plan: Applies to the cases that there has not decided official, just a plan yet.

c. Instruction to edit, delete and export data

To edit, delete and export data to Excel file, follow the instructions in section II.3, II.4, II.5, II.6**.**

d. Instructions for using some special functions

- Print the resignation decision:
  Step1: Select the **Decision List** in the Function Box to display the employees list on the data grid
  Step 2: Tick the employees need to print the decision.
  Step 3: In the Function box, Select **Print The Decision** as shown in Figure V.5.2
  Step 4: Click **Implementation**
  Step 5: Implement according to the instructions of the software.
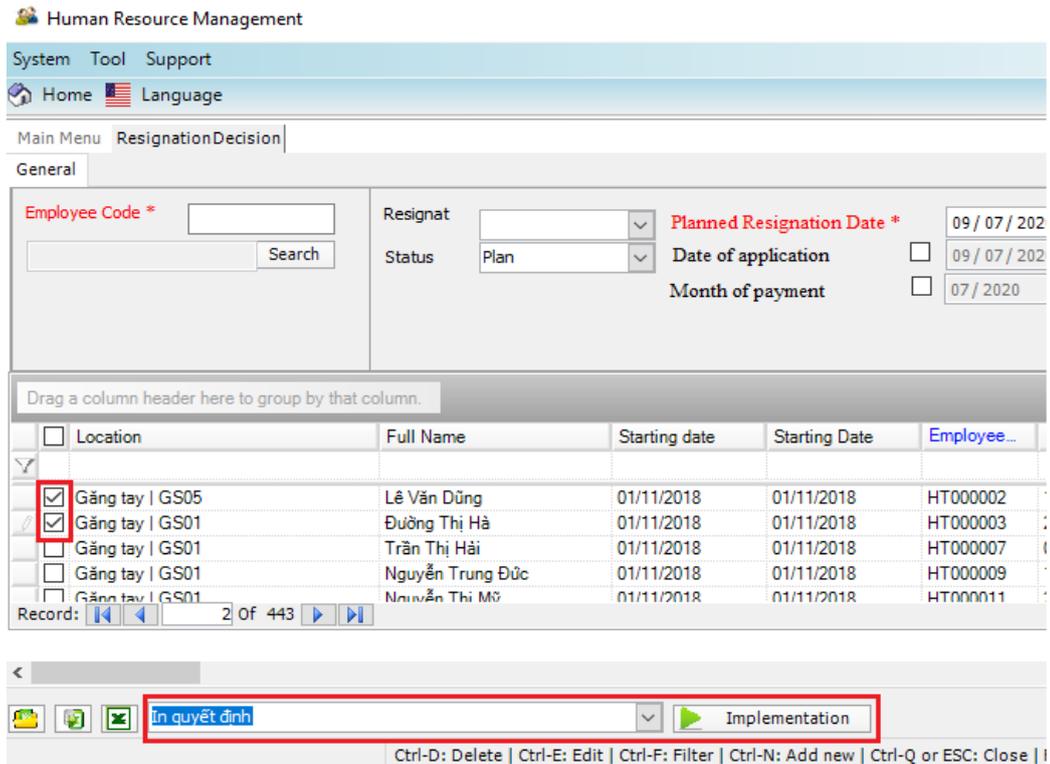
V.5.2

6. The Disabled Employees List Item

6.1. Item Description

This Item manages the list of disabled employees who are working in the enterprise.

6.2. Implementation instruction

a. Instruction to create information

In the Taskbar, Select [List Of Disabled Employees] .

To create the new information of disabled employees, follow the instructions in section **II.2**. After creating, the data will be displayed as Figure **V.6.1**
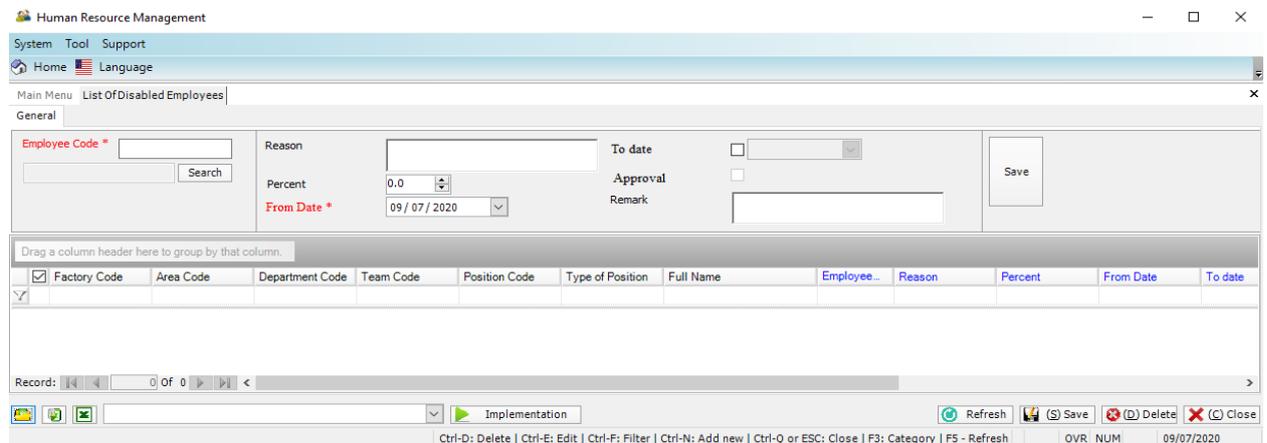
V.6.1

b. Explanation

- Reason: The reason has led to disability.
- Percent: the percentages of disability.

- From…to: the disabled time, if disability for life, the **To date** column can be blank
- Approval: the regime confirmation is disabled employees.
  c. Instruction to edit, delete, export data
    To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6.**
 **d. List of report**
- List of disabled employees

7. The Disciplinary violations management Item

7.1. Item description

This Item stores and manages employees' disciplinary violations.

7.2. Implementation instruction

a. Instruction to input the violations information

In the Taskbar, select Disciplinary Violations Management .

Input the information into the software, follow the instructions in section **II.2**. After creating, the data will be displayed as Figure **V.7.1**

V.7.1

b. Instruction to edit, delete and export data
  To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6**.
c. Reports Explanation
- List of the minutes has in force: is a list of the minutes that have been made and are doing in force by the time.
- List of the minutes date: a list of the minutes has been made by the time.
- List of the minutes by end date: is a list of minutes that have been made and have the end date by the time
- Synthesize and manage violations of the company policies, rules: this is a list of violations disciplinary records of each employee in 1 year.
- Print the invitation to handle the labor discipline: print the minutes of inviting staff to attend the meeting to handle the labor discipline.
- Violation record: print the record on handling the employee's violation of discipline.
- Record of labor discipline review: is a record used to consider the penalty when the employee is not present to attend the meeting the discipline when the number of times of sending the invitation is exceeded as prescribed.
- Record of labor disciplinary action: is the record sent when the employee did not attend the disciplinary meeting when it exceeds the number of times of sending the invitation as prescribed.
- The decision to handle the labor discipline: is a decision given to discipline the employee.

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8. The Item of Protective Clothing Distribution

8.1. Item description

This Item manages the distribution of protective clothing.

8.2. Implementation instruction

a. Instruction to input information

In the Taskbar, Select [icon] **Distribution of Protective Clothes** .

To create information, follow the instructions in section **II.2**. After creating, the data will be displayed as Figure **V.8.1.**

V.8.1

b. Instruction to edit, delete and export data

To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6**

c. Reports Explanation

- List of clothing distribution: A list of protective clothing were distributed by the time

VI. TIMEKEEPING MODULE

1. Instruction to register overtime

1.1. Item description

This Item manages the employees overtime registration data

1.2. Implementation instruction

a. Instructions for registering overtime information

In the Taskbar, Select **Register Overtime** .

To register, follow the instructions in section **II.2.** The data will then be displayed as Figure **VI.1.1.**

VI.1.1

b. Interface Explanation:

- Overtime registration: the number of hours register overtime (unit is the hour).
- Overtime type: there are 5 types of overtime (overtime after; overtime before; overtime noonday; overtime offset; overtime no offset)
    - Overtime on working day:
        - Overtime after: the overtime after working time.
        - Overtime before: the overtime before working time.
        - Overtime noonday: the overtime during lunch break.
    - Overtime on Sundays or holidays:
        - Overtime offset: Overtime registration then the employees can get one day for off work.
        - Overtime no offset: Registration overtime without compensatory day-off.
- The Shift: Working shift, based on this shift to calculate overtime for employees

c. Instruction to edit, delete and export data

To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6**

d. Reports Explanation

- Detailed overtime registration table: The list of overtime registrations of each day for each employee

- General overtime registration table: the list of multi-days overtime registrations of employees.

2. Shifts registration for employees

2.1.Content description

This item manages the shift registration for employees.

2.2.Implementation instructions

a. Shifts registration instructions

In the Task bar, choosing .

Shifts registration implement same as the Instructions in the section **II.2**. and then the data will be displayed as the Figure VI.2.1.
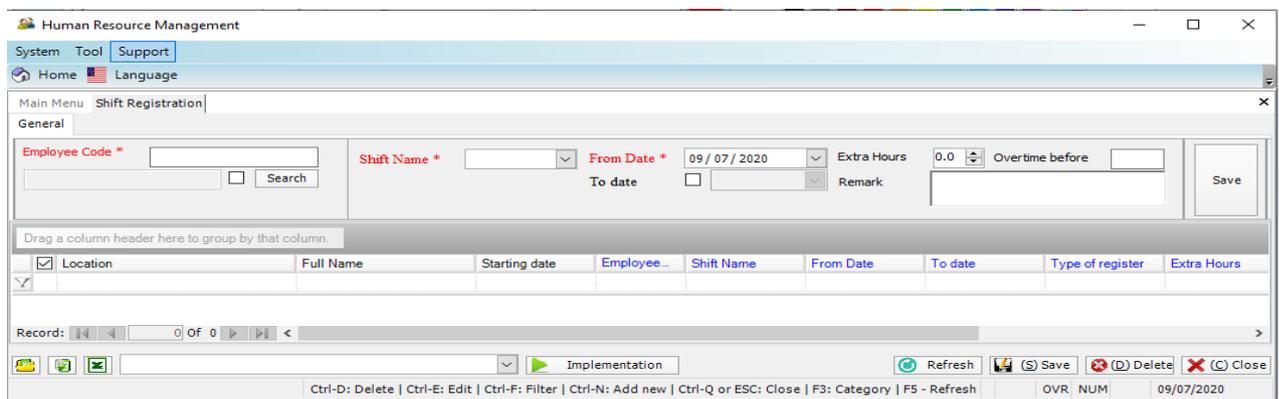
VI.2.1

b. Explanations

- From date, to date: is the time of the effective shifts. If it is a fixed shift, the **To date** column is blank; if it is a temporary shift, the information must be fill in the **To date** column.
- Registration type:
  - Digit 0: is a fixed shift.
  - Digit 1: is a temporary shift.
- Bonus hours: Is the number of hours added if working full time of the shift. Using in case the enterprise adds working hours to employees as a reward
- Overtime in advance: In the case register an **Overtime in advance** for employees, this Interface can also support. Users can choose registration overtime in advance here.

Note: If Worker A registers the fixed shift 01 from April 1, 2020 then he registers temporarily shift 02 from April 5, 2020 to April 10, 2020. The working time of this worker as follows:

From April 1, 2020 to April 4, 2020 is Shift 01;

From May 5, 2020 to April 10, 2020 is Shift 02;

From April 11, 2020 onwards is Shift 01.

c. **Instructions to edit, delete and export data**

To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

d. **Reports explanation:**

- List of registered shifts by day: A list of employees who register shifts by day.
- The list of shift registration in a period of time: A list of employees who register shifts in a period of time.
- Detailed shift table: A list of detailed shifts of employees for the reporting period.

	Location	Full Name	Starting date	Employee...	09/06/2020	10/06/2020	11/06/2020	12/06/2020	13/06/2020
	Tổng hợp l HT.GA	Hoàng Văn Hòa	03/01/2019	HT000185		81-Shift1	82-Shift2	82-Shift2	07-Shift3
	Tổng hợp l HT.GA	Nguyễn Huy Thảo	23/12/2019	HT000446	81-Shift1	82-Shift2	07-Shift3	07-Shift3	01-Shift1
	Tổng hợp l HT.GA	Trần Văn Quyền	23/12/2019	HT000447	81-Shift1	81-Shift1	82-Shift2	07-Shift3	07-Shift3
	Tổng hợp l HT.GA	Chu Đình Chung	25/12/2019	HT000448	82-Shift2	82-Shift2	07-Shift3	07-Shift3	01-Shift1
	Tổng hợp l HT.GA	Thái Bình Nguyên	25/12/2019	HT000449	82-Shift2	07-Shift3	07-Shift3	01-Shift1	81-Shift1
	Tổng hợp l HT.GA	Nguyễn Thế Anh	16/03/2020	HT000619	07-Shift3	02-Shift2	81-Shift1	82-Shift2	82-Shift2
	Tổng hợp l HT.GA	Nguyễn Văn Hùng	16/03/2020	HT000620	07-Shift3	07-Shift3	01-Shift1	81-Shift1	82-Shift2
	Tổng hợp l HT.GA	Ngô Đức Toàn	16/03/2020	HT000621	82-Shift2	07-Shift3	07-Shift3	01-Shift1	81-Shift1
	Tổng hợp l HT.GA	Trần Anh Tuấn	16/03/2020	HT000626	81-Shift1	82-Shift2	82-Shift2	07-Shift3	07-Shift3
	Tổng hợp l HT.GA	Nguyễn Xuân Sơn	19/03/2020	HT000630	07-Shift3	01-Shift1	81-Shift1	82-Shift2	07-Shift3
	Tổng hợp l HT.GA	Lê Văn Thắng	06/05/2020	ht000872	07-Shift3	07-Shift3	01-Shift1	81-Shift1	82-Shift2
	Tổng hợp l HT.SV	Nguyễn Thị Hải Lý	20/04/2020	HT000821	10-Shift0	10-Shift0	10-Shift0	10-Shift0	10-Shift0

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- List of unregistered shifts: This is a list of employees who have not registered shifts and do not register for leave.
- The list of wrong shift registration: is the list of employees who registered for 02 consecutive shifts but not separated at least 12 hours.
- Aggregate number of shifts: is a summary of the number of employees working by shifts, by day of a division.

	Workday	RFID	HC	Ca1	Ca2	Ca3	Ca3BV	NA1	NA2	Ca1BV	Ca2BV
	23/06/2020		605	0	0	0	4	2	0	2	3
	09/06/2020		594	0	0	0	4	2	0	2	3
	18/06/2020		608	0	0	0	4	2	0	2	3
	30/06/2020		633	0	0	0	4	2	0	3	2
	16/06/2020		592	0	0	0	4	2	0	2	3
	11/06/2020		592	0	0	0	4	2	0	2	3
	07/07/2020		647	8	1	0	0	2	0	0	0
	20/06/2020		613	0	0	0	4	2	0	2	3
	02/07/2020		648	8	1	0	0	2	0	0	0
	15/06/2020		595	0	0	0	4	2	0	2	3
	27/06/2020		616	0	0	0	4	2	0	2	3
	13/06/2020		597	0	0	0	4	2	0	2	3
	09/07/2020		677	8	1	0	0	2	0	0	0
	25/06/2020		618	0	0	0	4	2	0	2	3
	04/07/2020		655	8	1	0	0	2	0	0	0
	29/06/2020		624	1	0	0	4	2	0	1	3
	24/06/2020		616	0	0	0	4	2	0	2	3
	10/06/2020		594	0	0	0	4	2	0	2	3

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3. Instructions to Get Data from Timekeeping Machine

3.1. Function description

This function uses to get data of the start and end time of the shift of each employee from the timekeeper. Also, it can add timekeeping data in case of missing data.

3.2. Implementation instructions

In the Task bar, choosing **🗐 Export Data from Timekeeping Machine** -> the interface will display two main tabs: General Tab and Delete List Tab.

3.2.1. General Tab
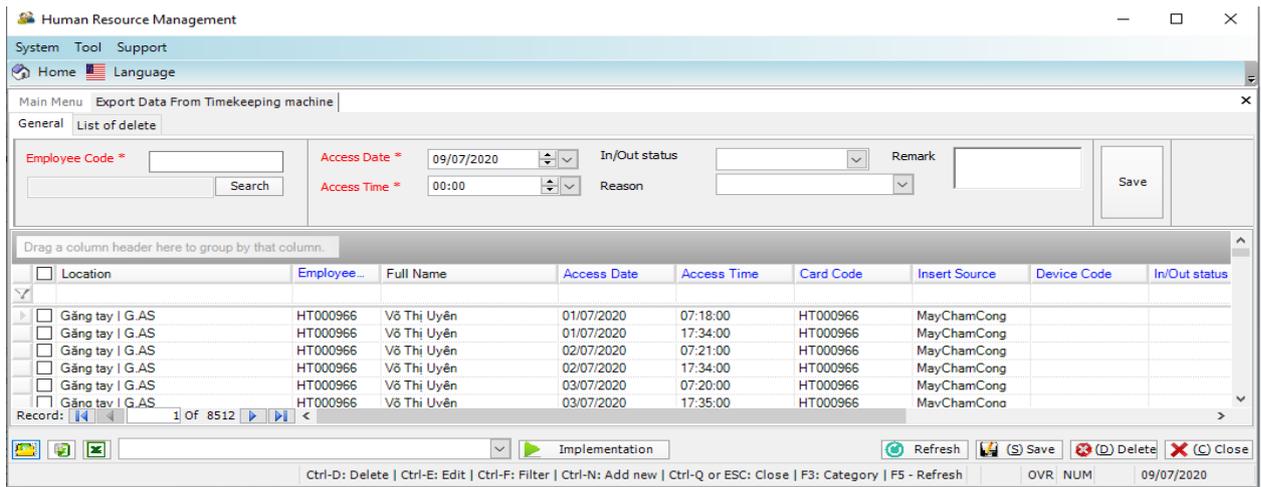
VI.3.1

a. **Instructions to get timekeeping data: there are 2 methods**
- **Method 1**: Get data for all employees. Follow the instructions in the Figure VI.3.2
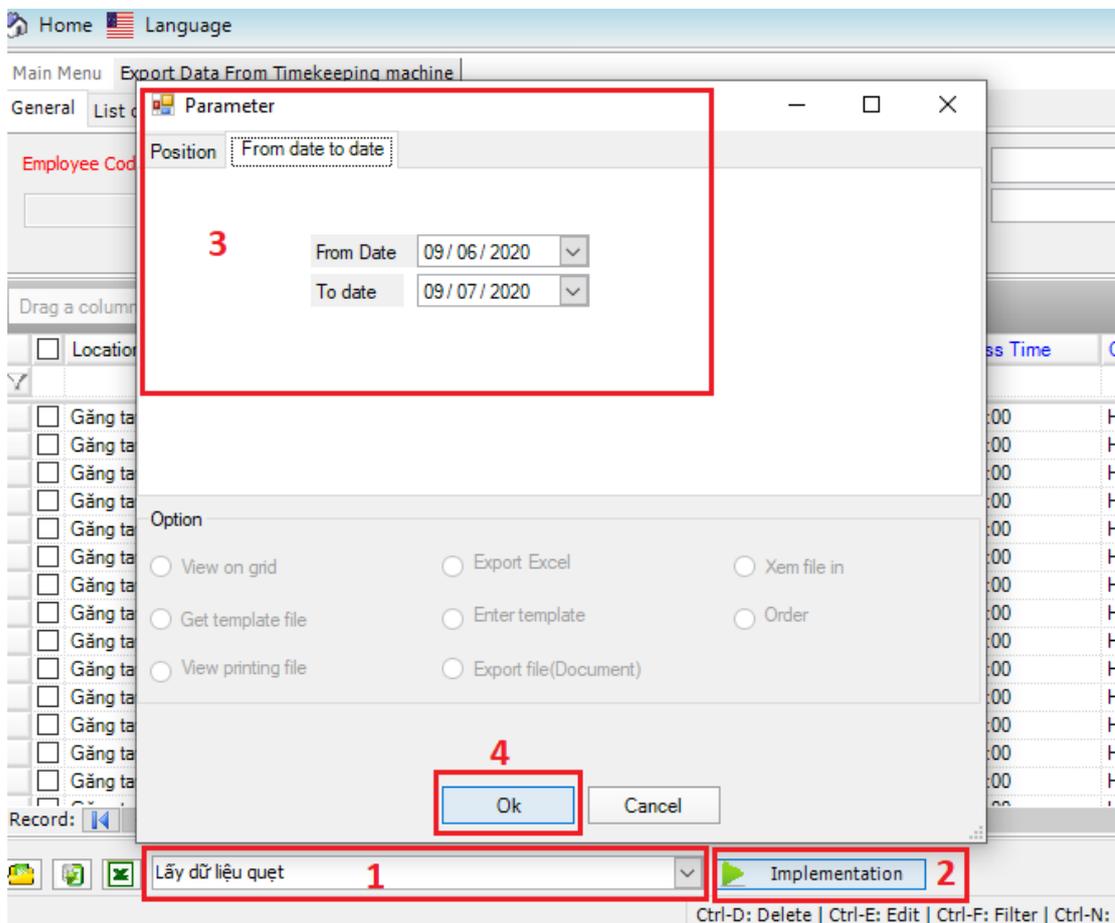
VI.3.2

Step 1: In the Function box, choose "Get timekeeping data".
Step 2: Click Implement button.
Step 3: Select the data by filter available, there are filter by location and by time.
Step 4: Click the OK button to get data or click Cancel button to cancel.
- **Method 2**: Get data according to employee code. Follow the instructions in the Figure VI.3.3
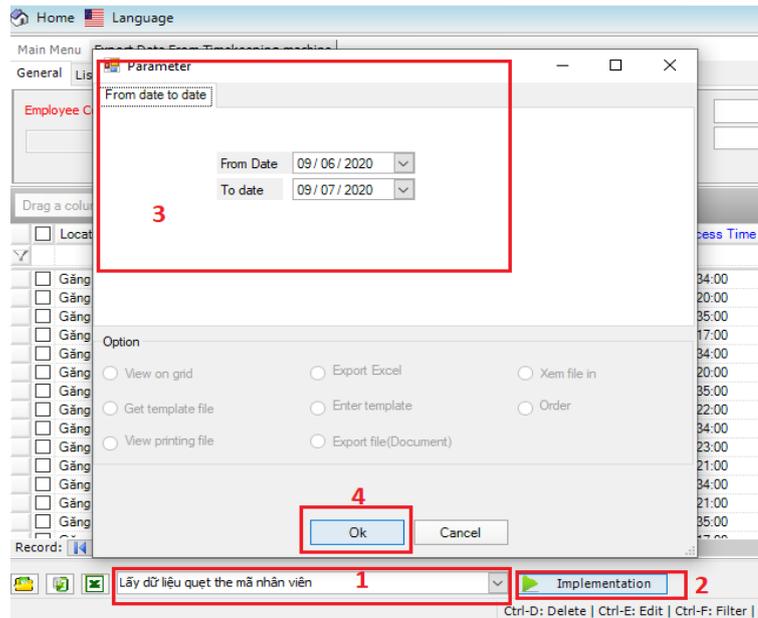
VI.3.3

Step 1: In the Function box, choose "Get timekeeping according to employee code".

Step 2: Click Implement button.

Step 3: Select the period to get data.

Step 4: Click OK button. Then the interface will display as Figure VI.3.4
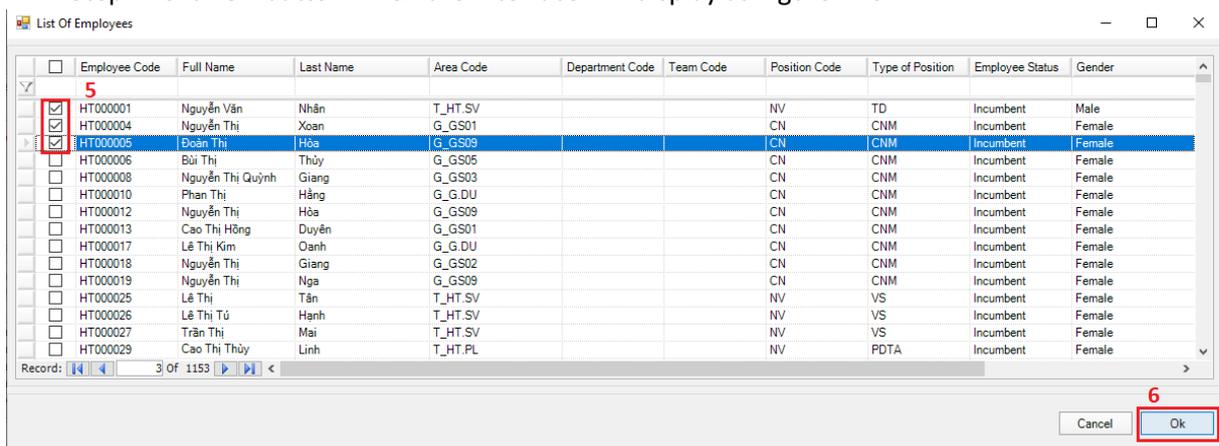
VI.3.4

Step 5: Select the employee to get timekeeping data.

Step 6: Click the OK button to implement or click Cancel button to cancel.

b.   Additional guidance for timekeeping information for employees

Implement same as the instructions in the section **II.2**

- Date, Time: is the date and time add to the timekeeping.
- In/out: the status of the time in/ time out.
- Reason: This is the reason for adding time in / time out.

c.   Instructions to edit, delete and export data

To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

d.   **Reports explanation**

- Timekeeping list by the shift registration: A list of employees had timekeeping data in accordance with the registered shift.
- List without timekeeping data by the shift registration: A list of employees who have registered shift but no timekeeping data.

3.2.2.   Delete List Tab

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This Delete List tab storing the timekeeping data were deleted in the "General Tab" by users.

Noted: When retrieving timekeeping data from the timekeeper, the Smartbook software will not retrieve the employee data that the user has previously deleted.

  a. **Instructions to edit, delete and export data**
    To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

4. Instructions to register the Outgoing Employee information

4.1. Function description
This function helps to manage information about going outside during working hours of employees.

4.2. Implementation instruction

  a. **Instructions to register information**

In the Task bar, choosing **Employee Request to Go Outside** .

Implementation to register same as the Instructions in the section **II.2**. and then the data will be displayed as the Figure VI.4.1.
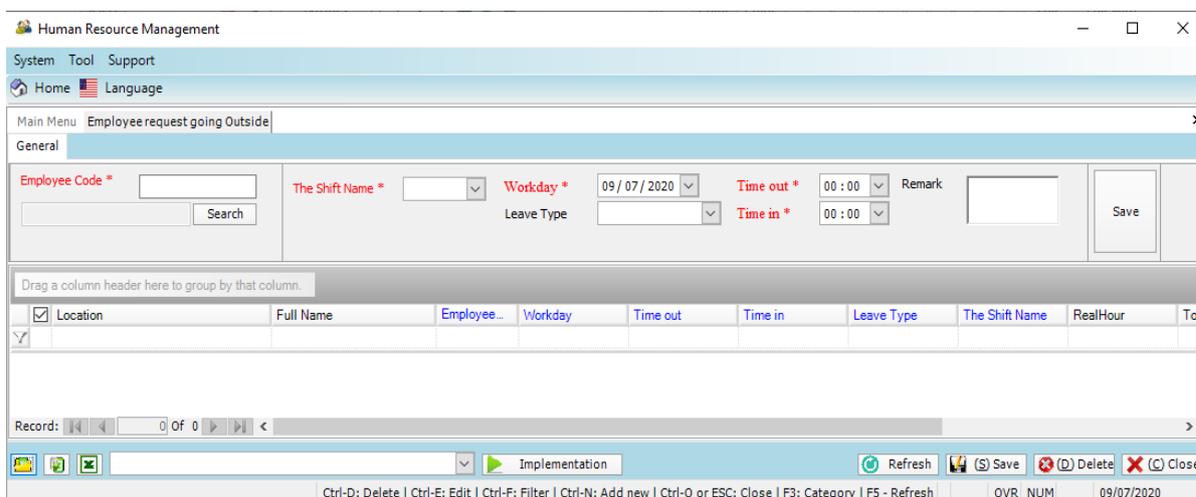
VI.4.1

  b. **Interface Explanation**
- The hour of going outside deducted from working hour: The time of going outside during working time.
- Total hours of going outside: Is the hours of going outside, including breaks time between shift.
  c. **Instructions to edit, delete and export data**
    To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**
  d. **Reports explanation**

- Table of employees going outside from the timekeeping data: An analysis table from the actual working attendance data of the employee.

- Table of approved absent in details: A list of employees is going outside in details and input by user.

	Location	Full Name	Employee...	Workday	Time out	Time in	Leave Type	Shift Name	RealHour
	Tổng hợp	HT.SV	Lê Thị Tú Hạnh	HT000026	10/06/2020	13:00	14:00	Private	HC	1.00
										1

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- The general table of approved absence: A list of employees is going outside in the choosing period

	Location	Full Name	Starting date	Employee...	09/06/2020	10/06/2020	11/06/2020	12/06/2020	13/06/2020
	Tổng hợp	HT.SV	Lê Thị Tú Hạnh	01/11/2018	HT000026		Private/13:00~14...			

Record: 1 Of 1

5. Maternity Registration Instructions

5.1. Function description

This function manages the list of pregnant women from the first day of pregnancy to the time of delivery.

5.2. Implementation instructions

a. Registration instructions

In the Task bar, choosing   .

Implementation to register same as the Instructions in the section **II.2**. and then the data will be displayed as the Figure VI.5.1.

VI.5.1

b. Interface Explanation:
- Due date: From this information, the software will calculate the first day of pregnancy for calculating the maternity regime.
- **Instructions to edit, delete and export data**
  To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

- **Reports and functions**
- List of pregnancy.
- List of employees have entitlement: The list of pregnant eligible for maternity benefits (come late or leave early 1 hour compared to the company's regulations).
- Maternity monitoring – nursing infant: This report summarizes of the monitoring from the first day of pregnancy until the time of giving birth and returning to work.
- Print the leave early card for maternity: Use it to print the card for those who are receiving maternity benefits. Guiding prints the leave early card:
  - Step 1: In the Function box, Choosing List of employees have entitlement.
  - Step 2: Click to employees need to print then implement as software guiding.

6. Instructions to register for Leave one or half day

6.1. Function description

This function manages the data of leave (annual leave, maternity leave …), leave without approval, create invitations in case employees are leave without approval too much than regulation.

6.2. Implementation instruction

c. Registration instruction

In the Task bar, choosing ![Leave Registration] .

Implementation to register same as the Instructions in the section **II.2**. and then the data will be displayed as the Figure VI.6.1.

VI.6.1

d. Interface Explanation

- Approval for leave filling: Use in case the employee registers leave to exceed the number of days allowed. For example, filling exceed the number of annual leave or the number of days off for pregnancy checkup…
- PN tồn (Remaining annual leave): The number of days left by the previous year transferred to the new year.
- PNĐN - Phép năm đã nghỉ: The number of leave day is used in the year.
- PNTC - standards annual leave (Up to the end of year): The maximum number of leave days yearly under company regulation (excluding remaining annual leave from the previous year).
- PNCL – Remaining annual leave (Up to the end of year): The remaining leave days can use until the end of the year.

- PNTC – standards annual leave (Up to now): Is the maximum number of leave days is counted up to the present (excluding remaining annual leave from the previous year).
- PNCL - Remaining annual leave (Up to now): The remaining leave days can use until now.

e. Instructions to edit, delete and export data

To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

f. Reports explanation

- List of absents: Is a list of employees' leave in a period of time.
- Detailed annual leave table: A annual leave summary report by month for employees who are working and already off work.

Employee...	Full Name	Date of Birth	Starting date	Starting Date	Employee Status	Resignation Date	Remaining annu...	PhepNamDuocH...	PhepNamConLai	PhepNamDuocH...	Phepl
HT000001	Nguyễn Văn Nhân	21/05/1988	01/11/2018	01/11/2018	Incumbent		1.00	14.00	15.00	7.29	7.00
HT000004	Nguyễn Thị Xoan	09/04/1996	01/11/2018	01/11/2018	Incumbent			14.00	14.00	7.29	7.00
HT000005	Đoàn Thị Hòa	02/01/1994	01/11/2018	01/11/2018	Incumbent			14.00	13.00	7.29	7.00
HT000006	Bùi Thị Thủy	14/08/1994	01/11/2018	01/11/2018	Incumbent			14.00	14.00	7.29	7.00
HT000008	Nguyễn Thị Quỳnh Giang	22/06/1993	01/11/2018	01/11/2018	Incumbent			14.00	14.00	7.29	7.00
HT000010	Phan Thị Hằng	08/08/1991	01/11/2018	01/11/2018	Incumbent			14.00	13.00	7.29	7.00
HT000012	Nguyễn Thị Hòa	19/09/1991	01/11/2018	01/11/2018	Incumbent			14.00	13.00	7.29	7.00
HT000013	Cao Thị Bảo Duyên	26/08/1991	01/11/2018	01/11/2018	Incumbent			14.00	14.00	7.29	7.00

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- List of absent by department: A statistical list of the number of employees taking leave by department.
- Unusual leave registration: A list of employees who have registered to absent but still have timekeeping data for that day.
- List of absent 5 times unapproved within 30 days: A list of employees who have taken leave without permission 5 times within 30 days.
- Print invitation letter: This function uses to print invitations to employees who have been absent without permission 5 times.

7. Instruction to Register for Leave by hour

7.1. Function description

This guide applies to absent by the hour for employees and approval (come to work late or leave early).

7.2. Implementation instruction

a. Registration instruction

In the Task bar, choosing ☑ **Leave Registration by hours** .

Implementation to register same as the Instructions in the section **II.2**. and then the data will be displayed as the Figure VI.7.1.
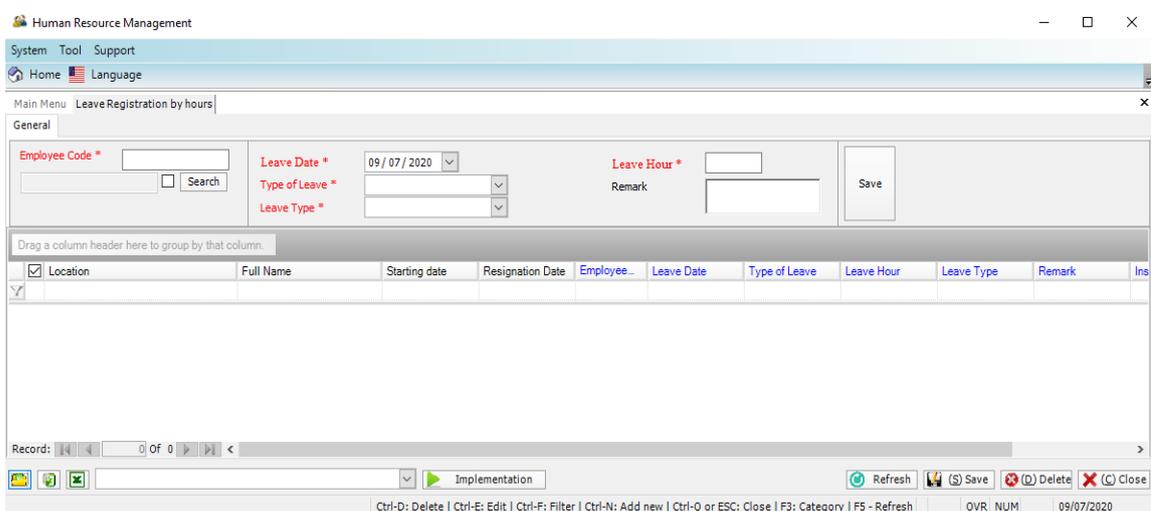
VI.7.1

b. **Instructions to edit, delete and export data**

To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**

c. **Reports**

- List of leave registration by hour: List of employees who register for leave by the hour.
- A list of come to work late or leave early: This report shows a list of employees who come to work late and leaves early based on actual timekeeping.

8. Instructions to Timekeeping Calculation

8.1. Item description

After having all the information of: Shift registration, timekeeping data, overtime registration data (if any), absent registration data, maternity registration data ... then this section will guide to calculating timekeeping.

In addition, if there is a lack of timekeeping that leads to the software cannot calculate it, users can add information in this step.

8.2. Implementation instruction

In the Task bar, choosing **Timekeeping - Daily** -> the interface will display as the Figure VI.8.1
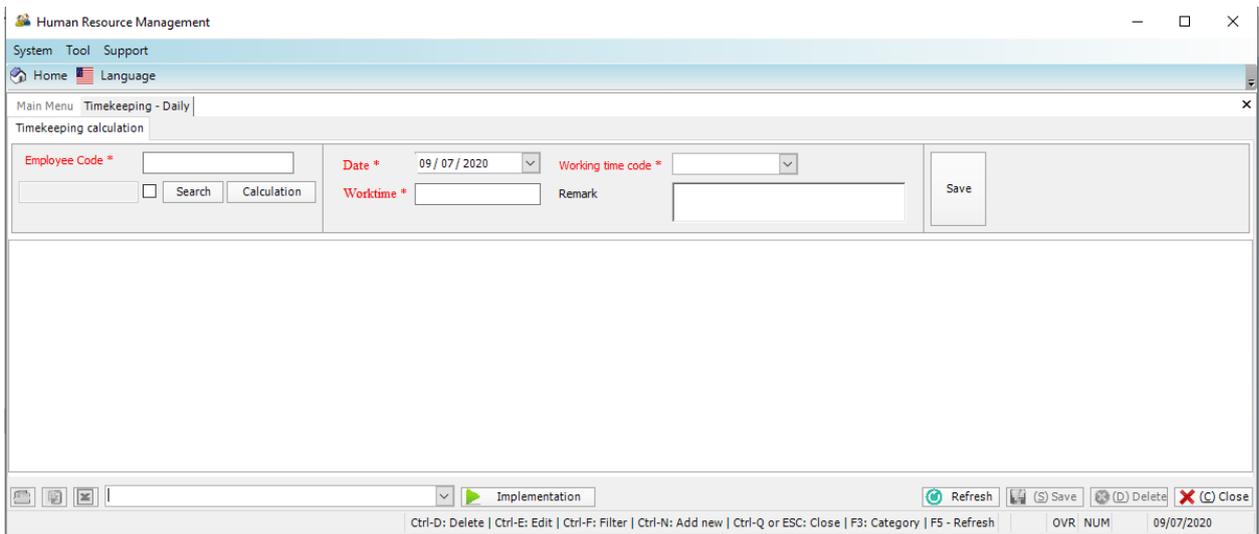
VI.8.1

a. **Timekeeping calculation guiding:** There are 2 methods
- **Method 1**: Calculation based on employee's code. (Figure VI.8.2).

Step 1: Type the employee's code.

Step 2: Choosing the day and month need calculation. For example, select May 10, 2020 as shown in Figure VI.8.2, which means timekeeping calculation in May 2020.

Step 3: Click the **CALCULATE** button. After calculating, click the **Search** button to display the calculation result.
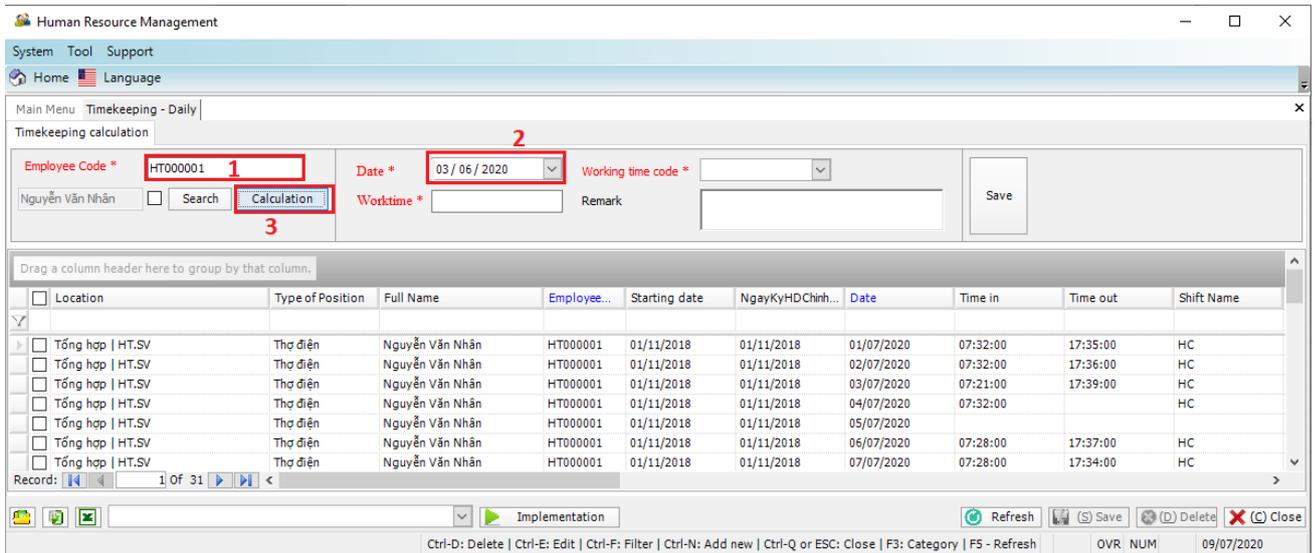
VI.8.2

- **Method 2**: Calculation timekeeping for all employees. (Figure VI.8.3)

  Step 1: In the Function box, choosing **Calculation timekeeping**.

  Step 2: Click Implementation.

  Step 3: Select filter values by location and by time

  Step 4: Click Implementation.

  Step 5: Click **OK** for calculation or **Cancel**.
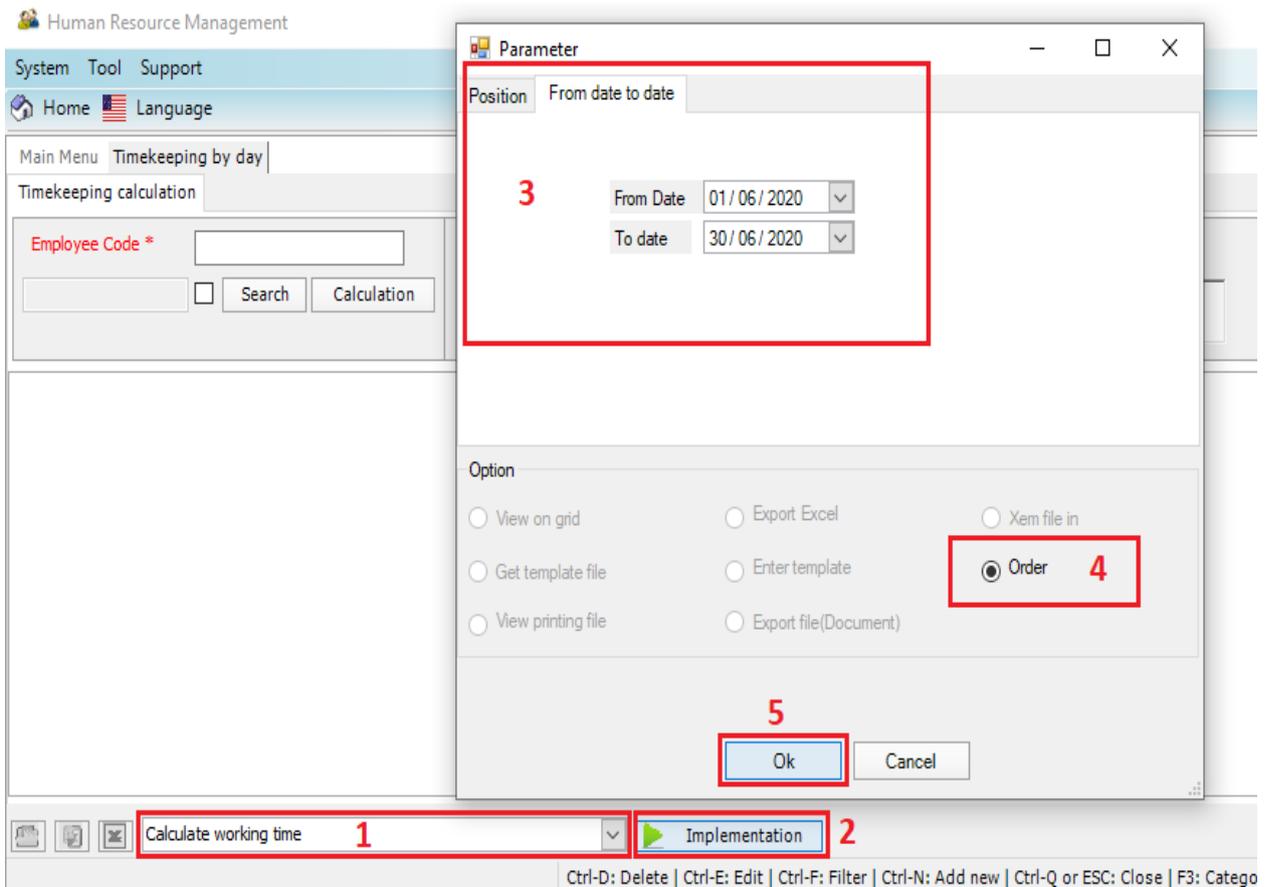
VI.8.3

b. **Timekeeping data additional guidance**

   If the case lack of timekeeping data such as: time in/out data, register the shift .... The software cannot logically perform to calculate timekeeping, it is possible to add timekeeping data at this function.

   To add data, follow the instructions in the section **II.2**.

c. **Interface Explanation**
- Work hours: In case the data grid does not display employees' timekeeping, users can add the work hours here or in other sections.
- Source of input: This information will show that data is inputted by user or calculated by software
d. **Instructions to edit, delete and export data**

   To edit, delete and export data to Excel file, follow the instructions in the section **II.3, II.4, II.5, II.6.**
e. **Reports explanation**
- General timesheet (using symbols): A list of employees working each day (X - full shift, X1 - full shift plus 1 hour overtime, CP - vacation, kp - unauthorized absences). Figure VI.8.4

Họ tên	Mã nhân vi...	N1	N2	N3	N4	N5	N6
Trần Thị Hoài Phương	HT000207	X1	X1	X1	X1	X1	X1
Bùi Hữu Như	HT000456	X1	X1	X1	X1	X1	X1
Bùi Thị Dung	HT000778	X	X	X1	X1	X1	X1
Bùi Thị Duyên	HT000806	X1	X1	X1	X1	X1	X1
Bùi Thị Liệu	HT000357	X	X	X1	X1	X1	X1
Bùi Thị Long	HT000374	X	X	X1	X1	X1	X1
Bùi Thị Mơ	HT000911	X	X	X	X	X	X
Bùi Thị Bảo Anh	HT000657	X1	X1	X1	X1	X1	X1
Bùi Thị Duyên	HT000721	X	X	X1	X1	X1	

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VI.8.4

- Detailed timekeeping table: A detailed report including information: how many working hours, how many overtime hours, how many hours are added under the regime…
- When the detailed timekeeping Table is exported, the interface will appear a window as shown in Figure VI.8.5. Then select the filter criteria to shown on the report.
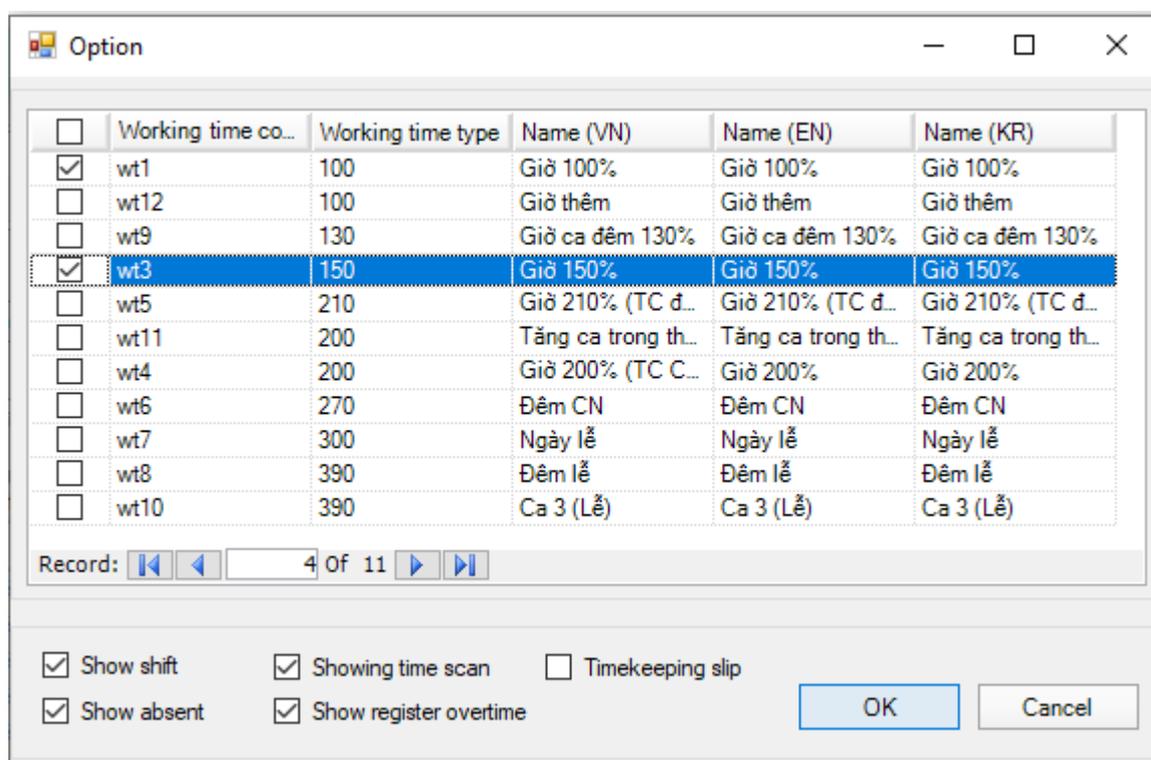
VI.8.5

Explanation some of the filtering criteria (Figure VI.8.5):

- In the dialog box containing many working time codes, depending on the user's request, select one or more codes to appear on the report.
- QV, QR hours display: Select to show the time in/ out.
- TC registration display: Select to display overtime register

  The report of Detailed timekeeping table will be in excel format as the Figure VI.8.6

VI.8.6

- Timekeeping table for salary calculation purpose: It is timekeeping summarized by day, and can view the data on the grid as shown in Figure VI.8.7 or view it as a timesheets voucher to print as the Figure VI.8.8.

VI.8.7

VI.8.8

- Summary of timekeeping: it is a summary of working hours, leave registration, come late/ leave early hours in a period for all employees.
- List of employees who do the 7-hour regime: is a list of employees work 7-hour regime.

- Overtime report: A summary of overtime in a period of time for all employees. (sort by employees)

## 9. Instructions for checking Unusual timekeeping

9.1. Function description

Unusual timekeeping such as: Only record time in, only record time out, no timekeeping and no leave registration, other unusual timekeeping according to the criteria of the business.

This function includes unusual timekeeping reports and support dealing it.
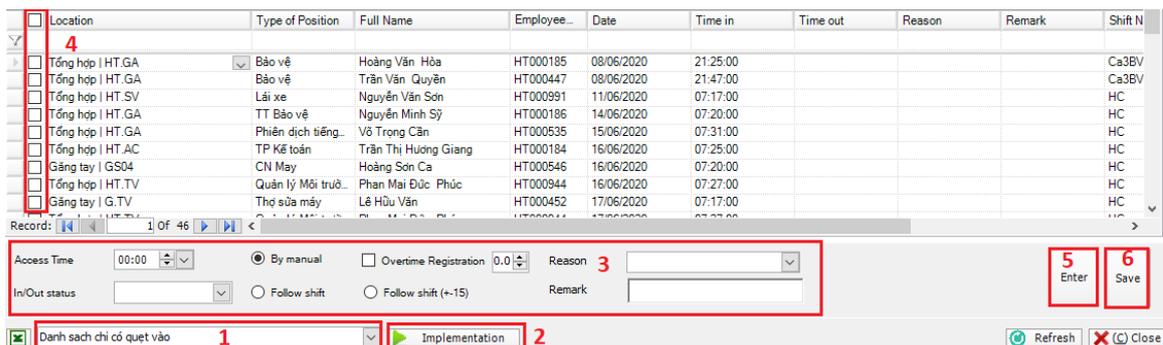
9.2. Implementation instruction

In the Task bar, choosing **Unusual timekeeping** -> the interface will display as the Figure VI.9.1
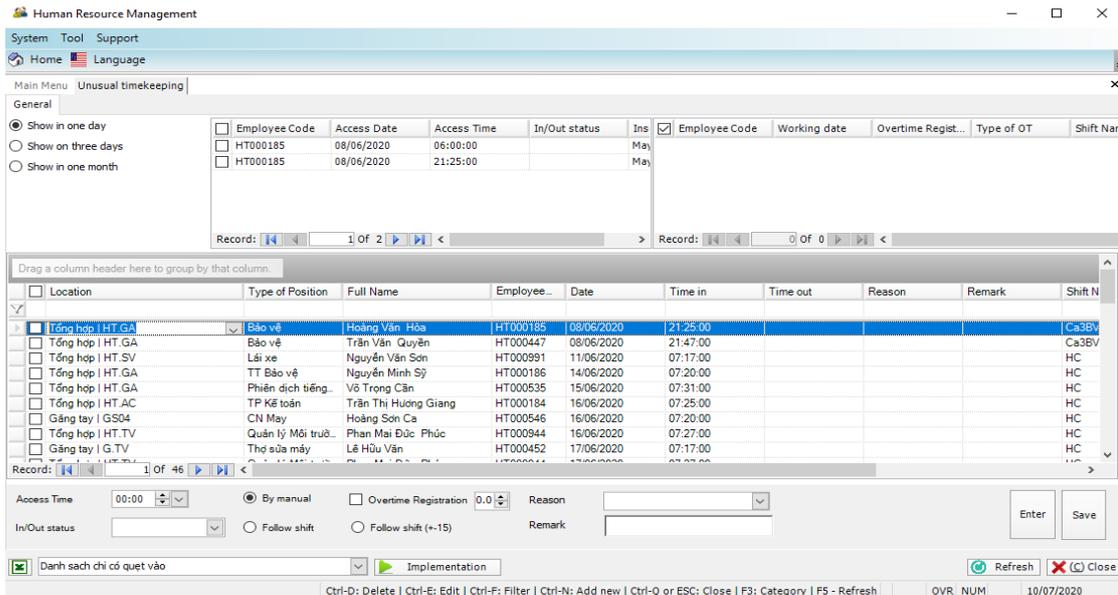
VI.9.1

a. **Guidance on handle of the unusual timekeeping (have only time in and lack time out)**

Follow the steps in the Figure VI.9.2

VI.9.2

Step 1: In the Function box, choose The timekeeping list only has time in.

Step 2: Click Implementation to display a list on the grid.

Step 3: Fill the information (time out additional)

Noted:

- In/out: the status of the time in/ time out. Choose Out/ Ra If missing timekeeping data of time out and vice versa.

- To add data, there are three options:

  i. **Follow shift** The software will automatically calculation time out base the shift and overtime. For example: If the shift is from 7:30 to 16:30 and registration an hour overtime, the time out is displayed as: 17:30.

  ii. **Follow shift (+-15)** The software will automatically calculate the time out base on the registered shifts and overtime (if any) and plus from 0 to 15 minutes. For example: If the shift is from 7: 30 ~ 16: 30 and registration an hour overtime, the time out to be recorded is: 17:30, or 17:31 ... or 17:45

  iii. **Nhập tay** 10:00 This option is for the user fill information.

Step 4: Select the line need to additional time.

Step 5: Click ENTER button, then the data will be imported to the grid as the red framed section in the image below.

Step 6: Click SAVE to save data.

b. Guidance on handle of the unusual timekeeping (have only time out and lack time in)

Implement the same as part **a**, and note:

Step 1: In the Function box, choose The timekeeping list only has time out.
Step 3: Fill the information (time in additional).

- **Follow shift** The software will automatically calculation time in base the shift and overtime. For example: If the shift is from 7:30 to 16:30 and registration an hour early overtime, the time in is displayed as 06:30.

- **Follow shift (+-15)** The software will automatically calculate the time in base on the registered shifts and overtime (if any) and minus from 0 to 15 minutes. For example: If the shift is from 7: 30 ~ 16: 30 and registration an hour early overtime, the time in to be recorded is: 06:30, hoặc 06:29 hoặc ... 06:15.

c. Guidance on handle of the unusual timekeeping (no timekeeping and no leave registration):
- A list of employees has no timekeeping data and no leave registrations
- To handle this case, follow the instructions in parts **a** and **b**.

d. Some report to check unusual timekeeping
  - **The list of come late - leave early**: A report showing a list of employees go to work late or leave early.
  - **List of unusual overtime**: A report showing a list of employees who have overtime registrations but are not actually overtime.
  - List of no timekeeping and registered leave: Is a report showing a list of employees registered on leave and no timekeeping record.
- Timing incorrectly according to the shift regulations: is a list of employees to come in earlier and come out later according to the company's regulations.

VII.   THE SALARIES CALCULATATION MODULE

## 1. List of Dependents Item

1.1. Item description

This Item manages the dependents list to calculate family circumstances deduction for employees.

1.2. Implementation instruction

a.   Guide to register dependents

In the Taskbar, select. **List of dependants** .

To register information, follow the instructions in section **II.2**. The data will be displayed as shown in Figure **VII.1.1**.
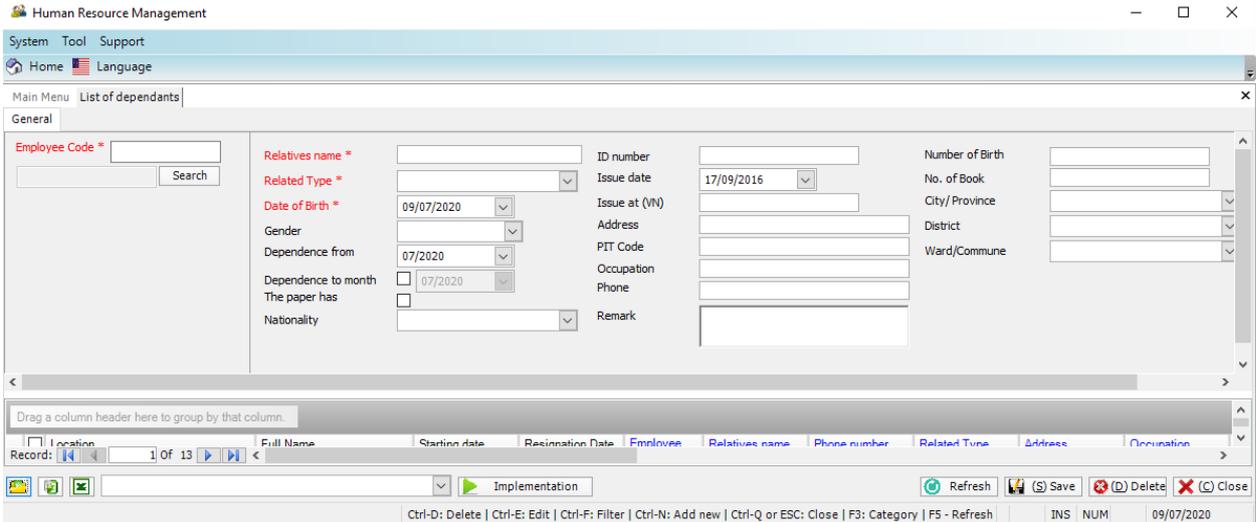
VII.1.1

f.   Interface Explanations
- Dependence from month: The time starts to calculate family circumstances deduction.
- Dependence to month: The time finishes to calculate of family circumstances deduction. In case the dependents are eligible for the Dependent for life, user do not tick this box.
- Paper submission: Using to verify that dependence is legal.

g.   Instructions to edit, delete and export data
To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6**.

h.   Reports Explanations
- List of dependents: Providing a list of dependents by month.

## 2. Setup The Pay Grade

2.1. Function description

This function uses to manage the pay grade, each pay grade corresponds to the salary group and salary level prescribed by the company. Users can fill in the salary group, salary level directly into the toolbar or import data from excel file

2.2. Implementation instruction

a.   Installation instructions

In Taskbar, select **Setup Pay Grade** .

To install the data, follow the instructions in section **II.2**. The data will be displayed as shown in Figure VII.2.1.
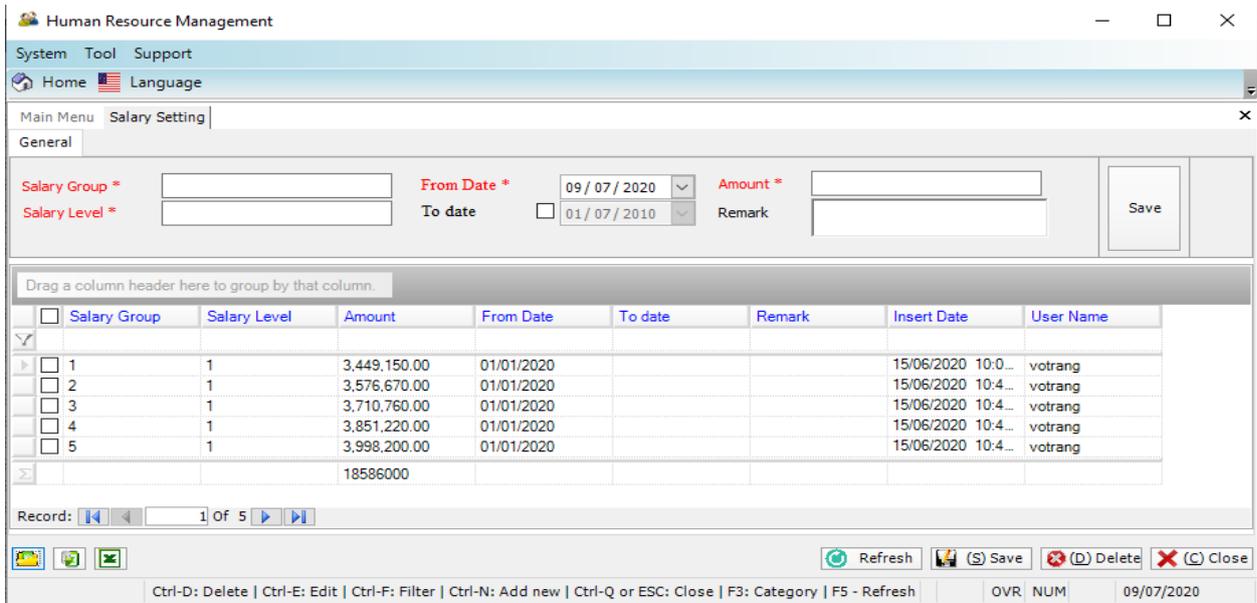
VII.2.1

b. Interface Explanations
- From date, To date: Effective day of salary.
- Each group of salary has many salary levels.

c. Instructions to edit, delete and export data
    To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6.**

## 3. Setting the workmanship Group, Level

3.1. Function description

This function is used to manage the workmanship level, each skill level corresponds to the group of different skill levels and has a different allowance according to the company's regulations. Users can fill information of workmanship group, levels directly into the toolbar or get data from the excel file.

3.2. Implementation instruction

a. Installation instructions:

In Taskbar, select .

To install the data, follow the instructions in section **II.2**. The data will be displayed as shown in Figure VII.3.1.
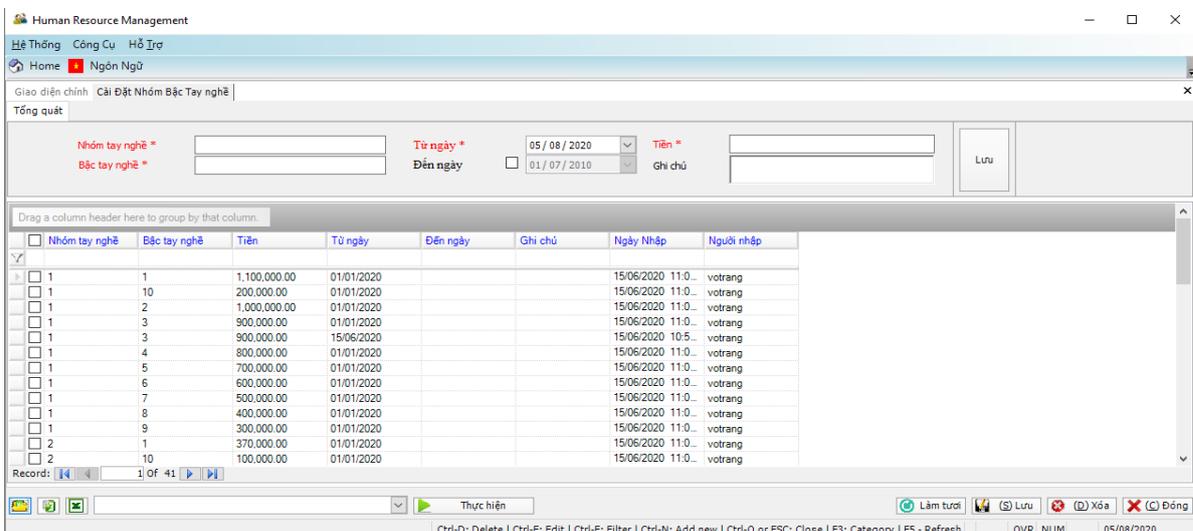
VII.3.1

b. **Interface Explanation:**
- From date, to date: Is the effective date for workmanship level
- A group of workmanship levels can have multiple skill levels
     Noted: "Up to date" Column can be left blank (apply indefinitely)

4. Registration A Pay Grade for Employees

4.1.Function description
 This function uses to register Salary Group, Salary level for each employee code to determining salary.

4.2.Implementation instruction
a. **Registration instruction**

In the Taskbar, select. **Register Pay Grade for Employees** .
To register the salary, follow the instructions in section **II.2**. The data will be displayed as shown in Figure **VII.4.1**

VII.4.1

Noted: The To date column can be blank.
b. **Instructions to edit, delete and export data**
     To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6.**
c. **Reports Explanations**
The Pay Grade of employees (All): Display the pay grade of all employees from beginning to now.

5. Register the workmanship level for employees:

5.1.Item description:
This item use to register employees' workmanship level and determine allowances by skilled levels.
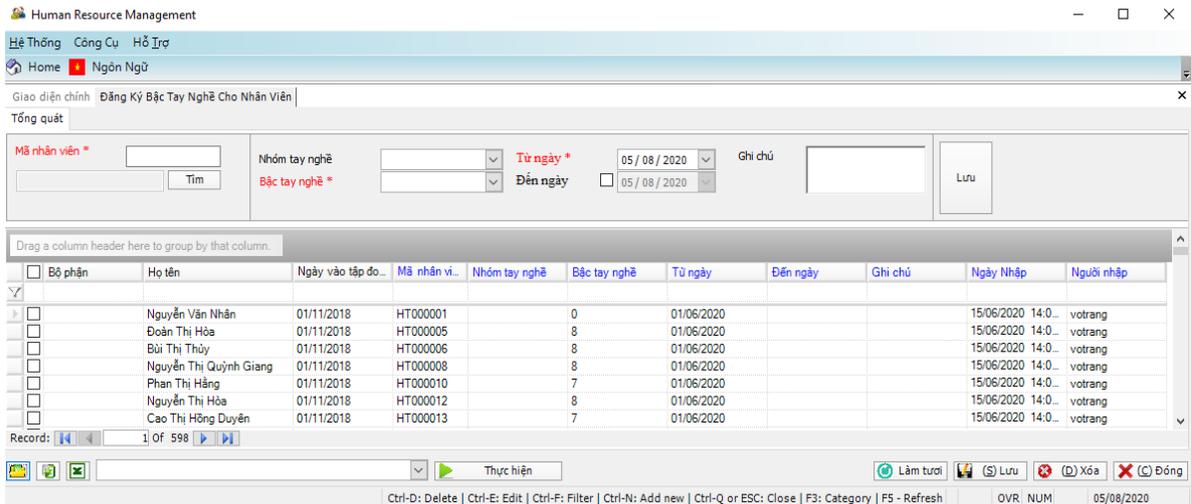
5.2.Implementation instruction:
a. **Registration instruction:**

In the Taskbar, select **Đăng Ký Bậc Tay Nghề Cho Nhân Viên** .

To register the information, follow the instructions in section II.2. The data will be displayed as shown in Figure VII.5.1

VII.5.1

b. Interface explanation:
- From date, To date column: Is the effective time of the workmanship level.
- Components: the workmanship levels are predefined and have different wages.
  Noted: The Skilled Group column, To date can be left blank.

c. Instructions to edit, delete and export data
To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6**.

d. Reports Explanations:
- Workmanship Level (All): Shows all the employee's skill level from past to present.

6. Fixed Salary Item

6.1. Item description

This Item manages long-term salaries and unchanged in a long time of employees

6.2. Implementation instruction

a. Guide to creating new

In the Taskbar, select .

To create new information, follow the instructions in section **II.2**. After creation, the data will be displayed as a Figure VII.6.1.
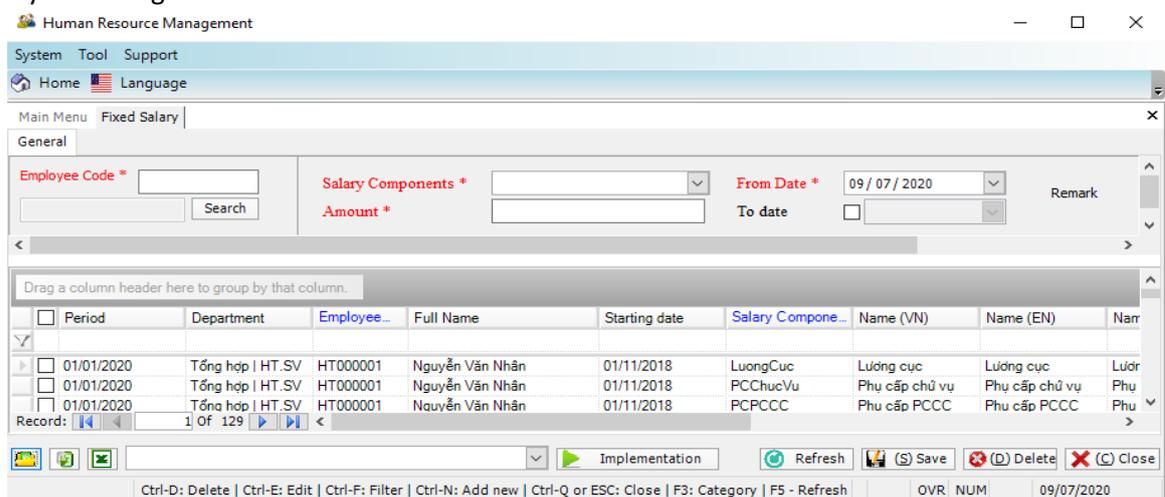
VII.6.1

    b. Interface Explanations
- Salary components: A list of long-term salaries and allowances such as: Basic salary, responsibility allowance, house allowance ....
- From date to date: the effective day of salary components.
    Noted: The **To date** column can be blank.

    c. Instructions to edit, delete and export data
    To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6.**

    d. Relevant reports
- Detailed fixed salary: A report shows the salary details as showing in Figure VII.6.1.

7. Amounts Generated (Increase / Decrease)

7.1. Function description

This function manages the increase / decrease amount of the employees monthly (if any). For example: salary compensation last month, penalty of disciplinary violations ...

7.2. Implementation instruction

    a. Guide to register

In the Taskbar, select **Amounts Generated (Increase / Decrease)** .
To register information, follow the instructions in section **II.2**. The data will be displayed as shown in Figure VII.7.1.

VII.7.1

    b. Interface Explanations
- Salary components: A list of salaries and allowances increase / decrease in a month: For example: Compensation of unpaid wages due to lack of the previous month, Productivity bonus ...
- Month, Year: Effective month of salary components.

    c. Instructions to edit, delete and export data
    To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6.**

    d. Relevant report:
- Detailed arising salary: A report shows the salary details as showing in Figure VII.7.1.
- General arising salary: The report shows the salary

## 8. The Contract Management Item

8.1. Item description

This Item manages the contract and the labor contract process of employees from the first probationary contract until the permanent full-time labor contracts and contract appendices.

8.2. Implementation instruction

    a. Guide to creating new

In the Taskbar, select **Labor Contract Management** .

To create information, follow the instructions in section **II.2**. The data will be displayed as shown in Figure VII.8.1.
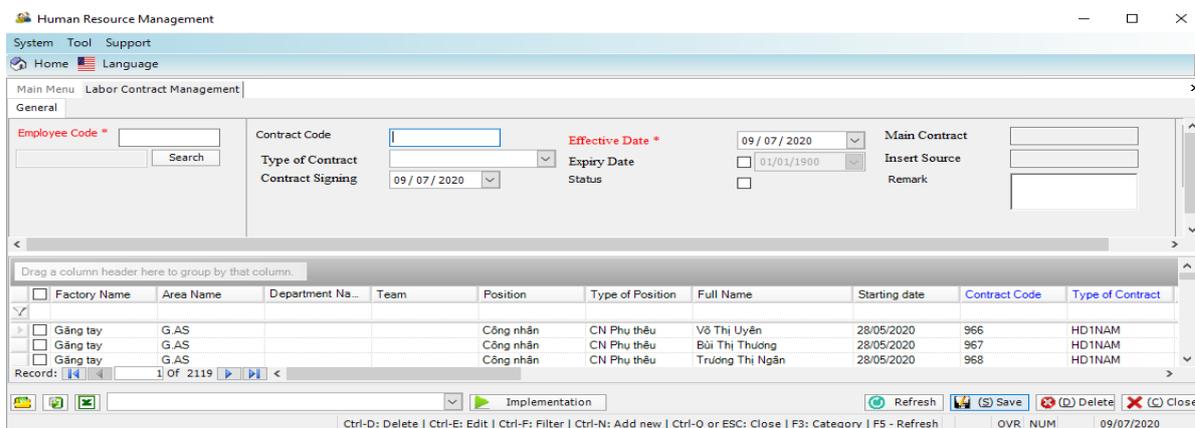
VII.8.1

b. **Interface explanation**
- Main Contract: showing the latest contract code that the software automatically associates with the staff code in case of creating contract appendix.
- **Noted**: In the case of a permanent full- time labor contract, there is no need to select the End Date.

c. **Instructions to edit, delete and export data**
   To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6.**

d. **Reports explanation**
- List of contracts by signing date: the contracts list of employees is working in the selected period.
- List of contracts by expiration date: the contracts list will expire during the period of employees who are working.
- List of contracts is affecting: the contract list is doing in force in the selected period.
- List of the expected signing contracts: the contract list will be sign expectedly in the selected period
- Print probation contract: This function to print the probation contract.
- Print Official contract: This function to print the Official contract.

9. Salary calculation

9.1. Function description

This function uses to calculate salary and manages the salary reports.

9.2. Implementation Instruction

In the taskbar, select **Salary Calculation** .
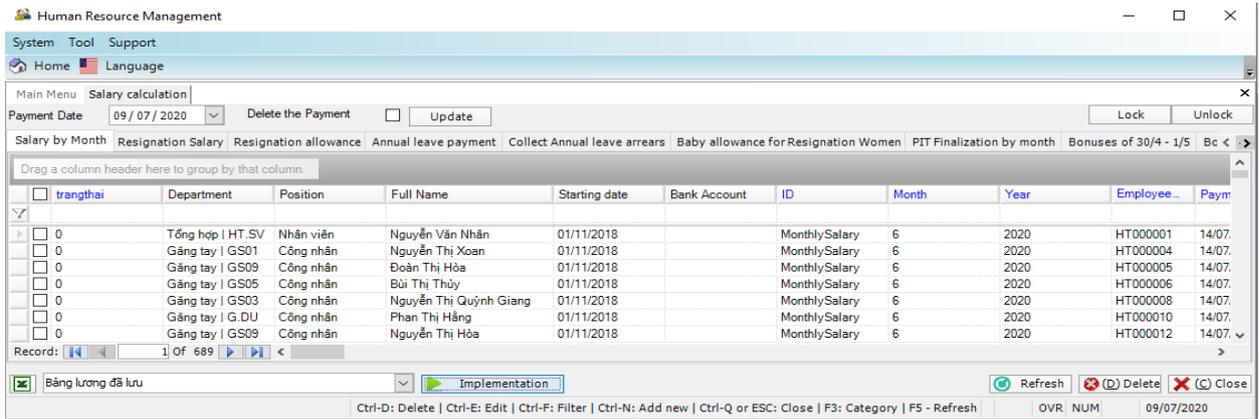
VII.9.1

9.2.1. Guide to calculate salary

Salary Calculation task: Month Salary, Resignation Salary, Resignation allowance, Unused Annual leave payment, annual leave retrospect, Child support, PIT Finalization, bonus 30/4-1/5, bonus 2/9, bonus 13th month. Each the salary calculation task will be corresponding to a tab on the interface.

a. Guide to calculate the monthly salary

The steps to calculate salary (7 steps - Figure VII.9.2)

> Step 1: Select Monthly salary Tab
> Step 2: In the Function box selects Salary Calculation
> Step 3: Click the Implementation
> Step 4: Select the month is calculated the Salary
> Step 5: Click OK to calculate salary or Cancel to cancel.
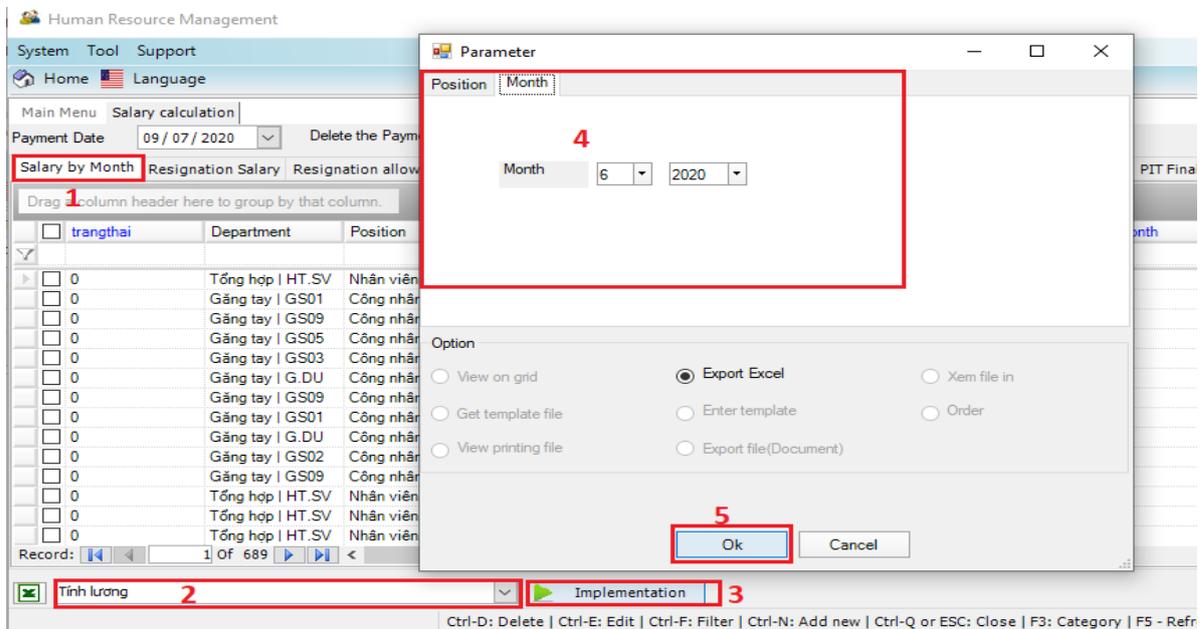
VII.9.2

> Step 6: Select the folder to save the payroll-> Click Save
> Step 7: The interface will appear a dialog box and ask "Do you want to save salary data?" As Figure VII. 9.3

Bạn có muốn lưu dữ liệu lương?

Yes   No
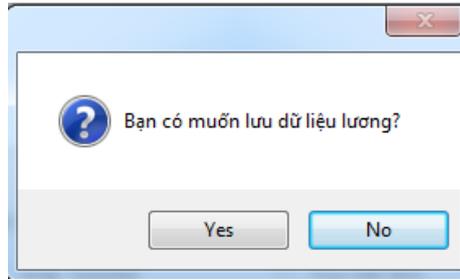
VII.9.3

Step 8: Click "Yes", the payroll will be exported into Excel file and saved in the database.
Click "No" the payroll only exports to excel files and not save in the database. In the future, the user cannot export this payroll information

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VII.9.4

b. Instructions to calculate the salary:
- The steps are similar to calculate the monthly salary
- **Noted**: Users need to input the resignation time of salary calculating for employees.

c. Instructions to calculate the resignation allowance:
- The steps are similar to calculate the monthly salary
- **Noted:** Users need to input the calculating time of resignation allowance for employees

d. Instructions to calculate the annual leave payment (for the resignation employees)
- The steps are similar to calculate the monthly salary
- **Noted**: Users need to input the resignation time of employees.

e. Instructions to calculate the Child support (for the resignation employees)
- The steps are similar to calculate the monthly salary
- **Noted:** Users need to input the calculating time of child supporting for the resignation employees.

f. Instructions to PIT Finalization
- This function uses to calculate PIT Finalization by month
- The steps are similar to calculate the monthly salary

g. Instructions to calculate the bonuses of 30/4 - 1/5, and the 13th month salary
- The steps are similar to calculate the monthly salary

9.2.2. Instruction lock – unlock salary

After completing the salary calculation, it is necessary to lock the salary to secure the data. The steps implement the lock or unlock salary (Figure VII. 9.5):

Step 1: Select Payroll in the Function box
Step 2: Click Implementation
Step 3: Tick the salary line need to lock or unlock
Step 4: Click the lock or unlock button (right top corner)
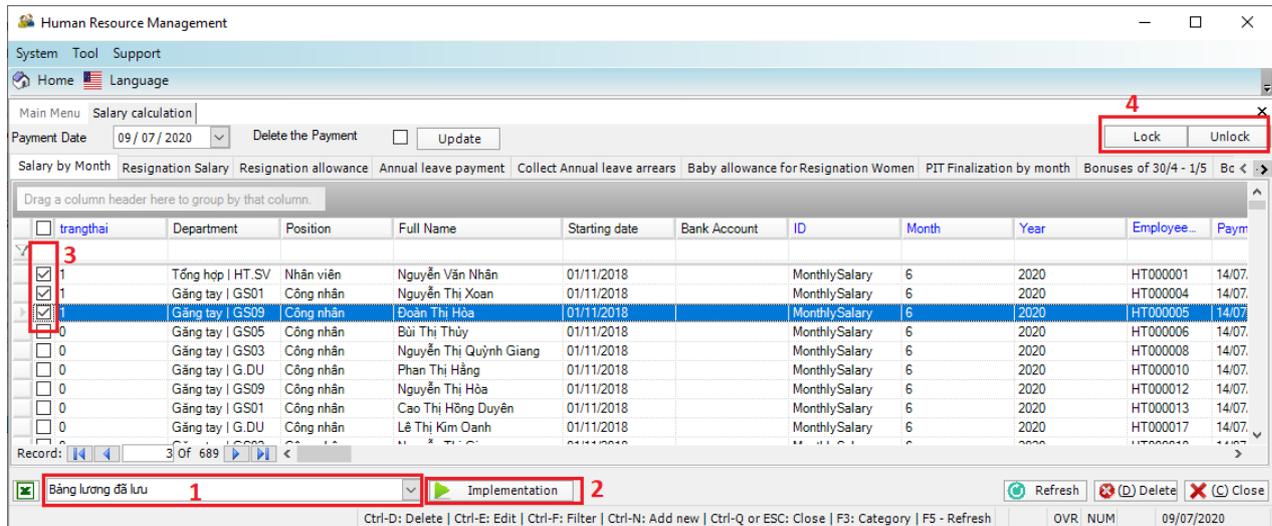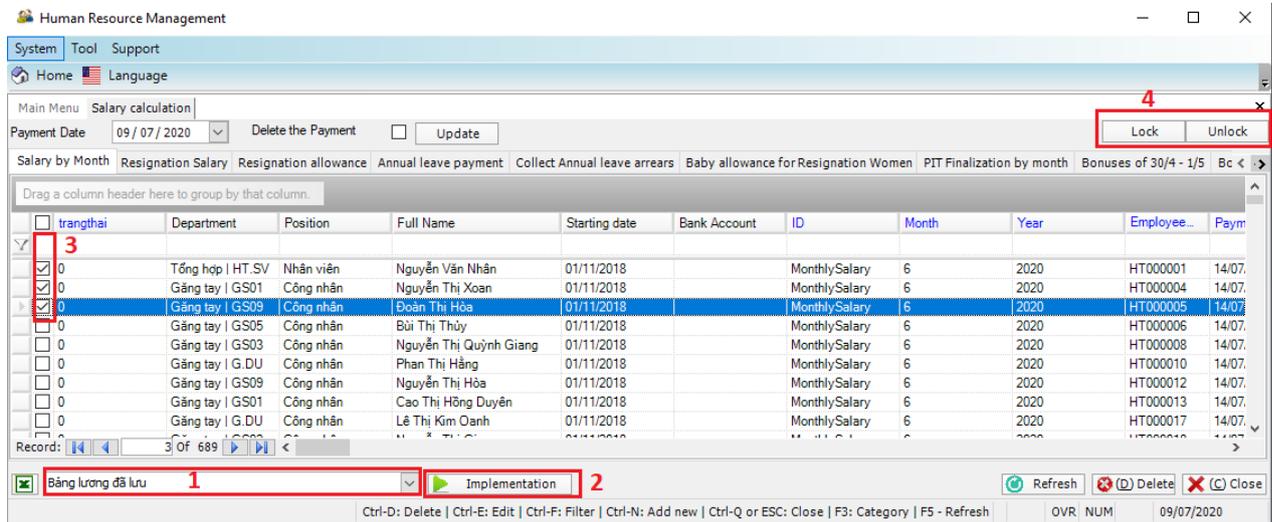
VII.9.5

Noted:

- In the "**Status**" column: There are 2 data displaying the digit "0" or "1" ("1": meaning that the salary line has been locked; "0": meaning that the salary line has not been locked)
- **PayDate** Column: The date column pays the salary. This column uses to determine the month of salary payment for the PIT finalization purpose.

9.2.3. Instruction to print pay-slips

There are 5 steps to print your paycheck (Figure VII.9.6):

Step 1: Tick the line need to print the pay-slip
In case of printing the pay-slip for all of employees: Tick the left box next to the headline "**Status**"

Step 2: Select Print the Pay-slip in the Function box and then Click the Implementation button
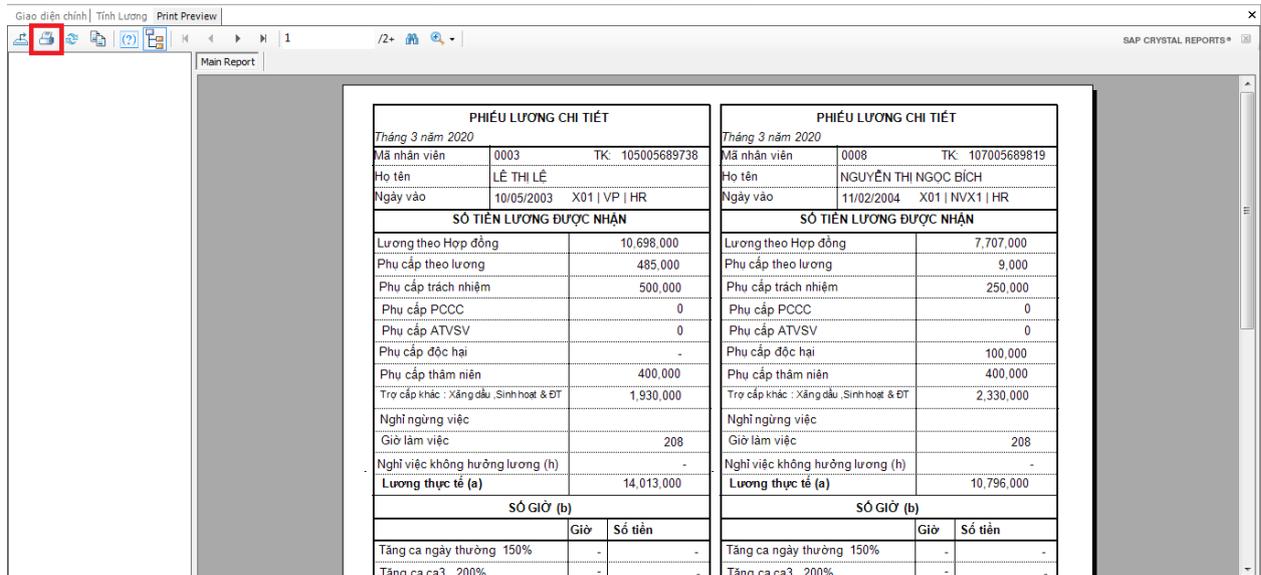
Step 3: Select the month to print and then select Preview the File

Step 4: Click OK
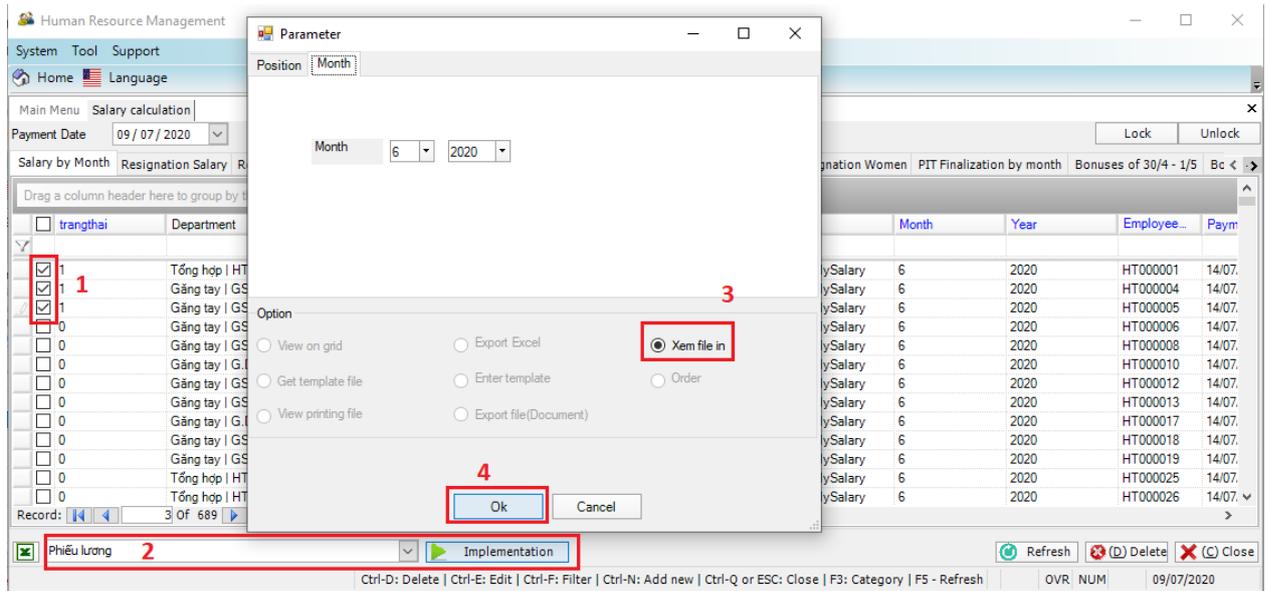
VII.9.6

Step 5: Click 🖨 icon to print pay-slip (Figure VII.9.7).

VII.9.7

VIII. INSURANCE MODULE

1. Social Insurance Books Management
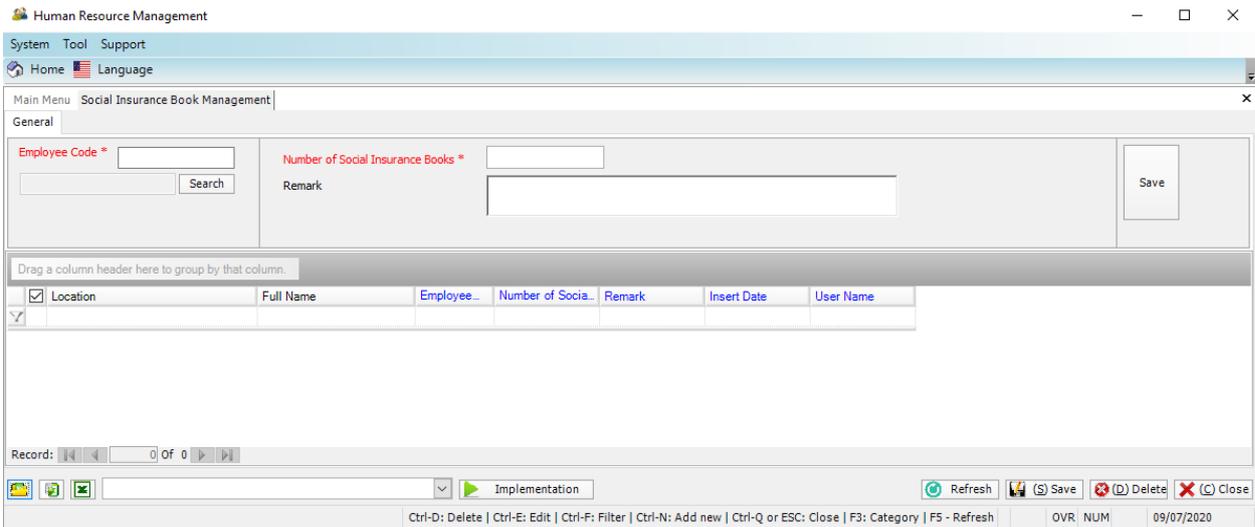
1.1.Item description

This item uses to manage the information of Social Insurance Books of employees.

1.2.Implementation Instruction

a. Instructions to add the number of social insurance books:

In the taskbar, select 📇 **Social Insurance Book Management** .

To create information, follow the instructions in section **II.2**. The data will be displayed as shown in Figure VIII.1.1.

VIII.1.1

b. Interface explanation

The number of social insurance book is the employee's social insurance book number

c. Instructions to edit, delete and export data

To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6.**

d. Report explanation

List of social insurance books: is a list of social insurance books of employees for each department

b. Instructions to edit, delete and export data

To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6.**

2. Health insurance Card Management

2.1.Item description

This item uses to manage the information of Health insurance Card of employees.

2.2.Implementation Instruction

a. Instructions to add the number of social insurance books:

In the taskbar, select 📇 **Health Insuarance Card Management** .

To create information, follow the instructions in section **II.2**. The data will be displayed as shown in Figure VIII.2.1.
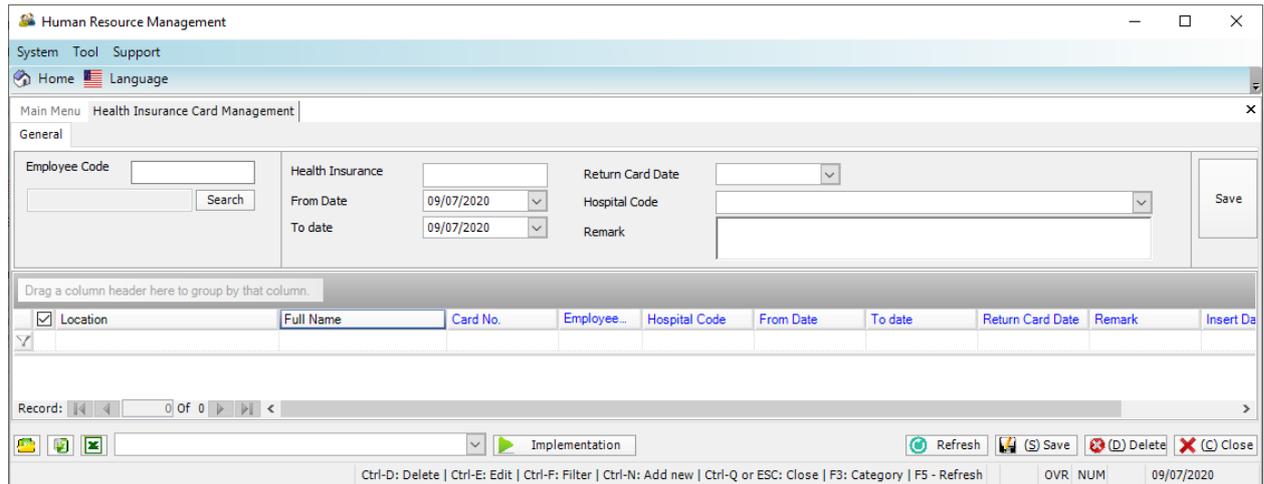
VIII.2.1

b.   Interface explanation

- Card No.: The Employee's health insurance card number.
- From date; To date: Effective date of the health insurance card.
- Return Card date: The date of the health insurance card is returned.
- Hospital code: Hospital code where the health insurance card is registered

Noted: The return date can be blank.

c.   Instructions to edit, delete and export data
To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6.**

d.   Report explanation
List of health insurance cards: A list of health insurance books of employees by each department.

3.   Insurance Report
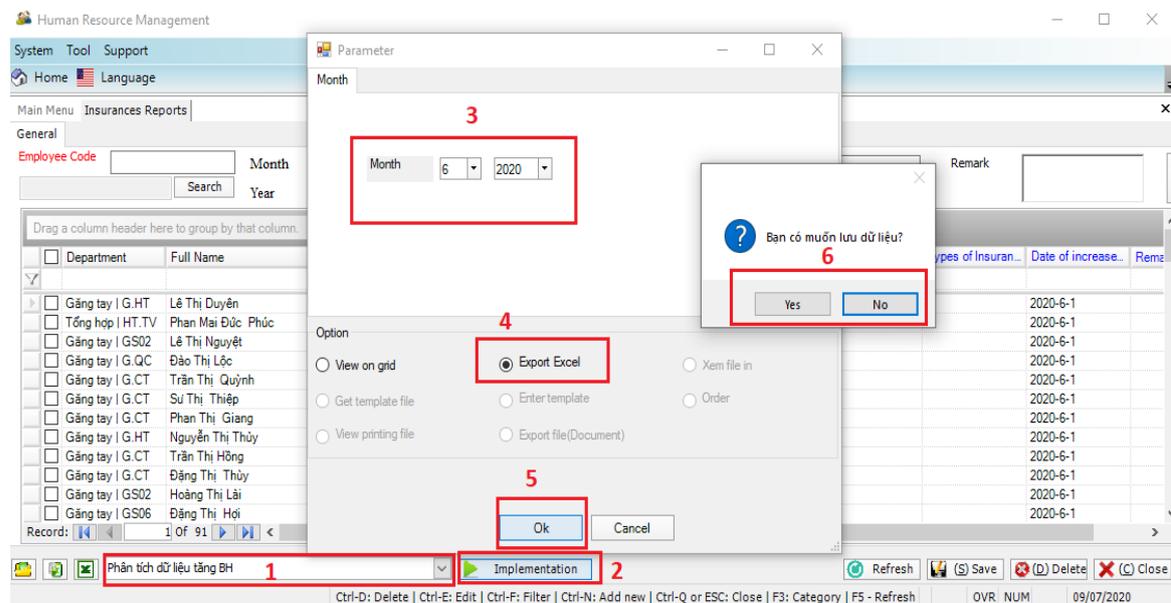
3.1. Item description

This Item uses to calculate the insurance increase/ decrease and related reports according to form D02-TS.

3.2. Implementation Instruction

In the taskbar, select ⊞ **Insuarances Reports** .

a.   Instructions for getting the data of increase or decrease insurance monthly

Follow the instructions as shown in Figure VIII.3.1

VIII.3.1

- Step 1: In the Function box, select "Analyze the data of increasing Insurance" or "Analyze the data of decreasing Insurance"
- Step 2: Click the "Implementation" button
- Step 3: Select the month to get the insurance data
- Step 4: Select "Export Excel"
- Step 5: Click "OK" to save the data and select "Cancel". Click "OK", the data will be displayed on the grid as shown in Figure VIII.3.2.
- Step 6: Click "Yes" or "No" to save or not to save information into the database.

VIII.3.2

b. Instructions for additional the data of increase or decrease insurance monthly

After checking information in the list of insurance increase / decrease in the month (Figure VIII.3.2), if users need to add more information, follow the instructions in section **II.2**. The data will be displayed as shown in Figure VIII.3.3.
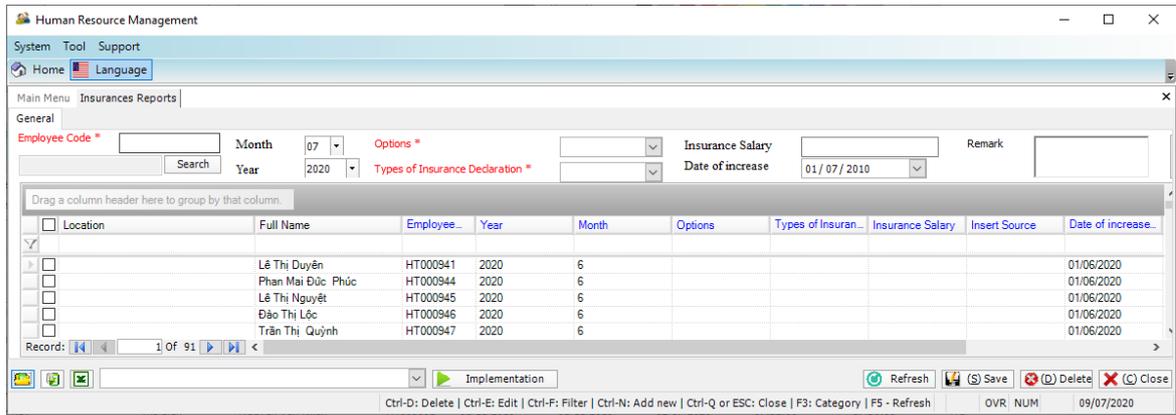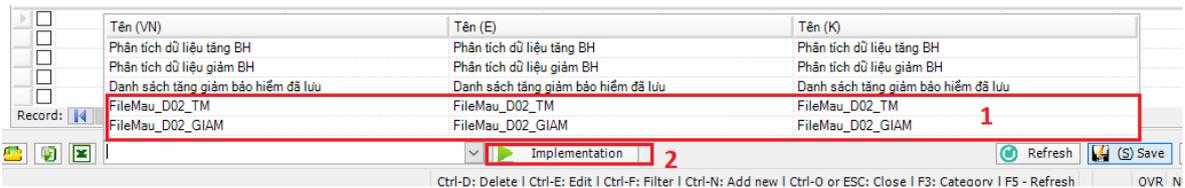
VIII.3.3

c. Instructions for getting D02 – TS Form

- Step 1: In the Function box, select the form D02 - TS to be declared (Figure VIII.3.4):

    File D02 - TS (Decrease): List of employees who need to decrease insurance in the month.

    File D02 - TS (Increase): List of employees who need to increase insurance in the month.

    File D02 - TS (Increase and Decrease): List of employees who need to increase and decrease insurance in the month.

VIII.3.4

- Step 2: Click the "IMPLEMENTATION" button (Figure VIII.3.4)
- Step 3: Select the month
- Step 4: Select "Export Excel"
- Step 5: Click the "OK" button to get the form D02 - TS as shown in Figure VIII.3.5
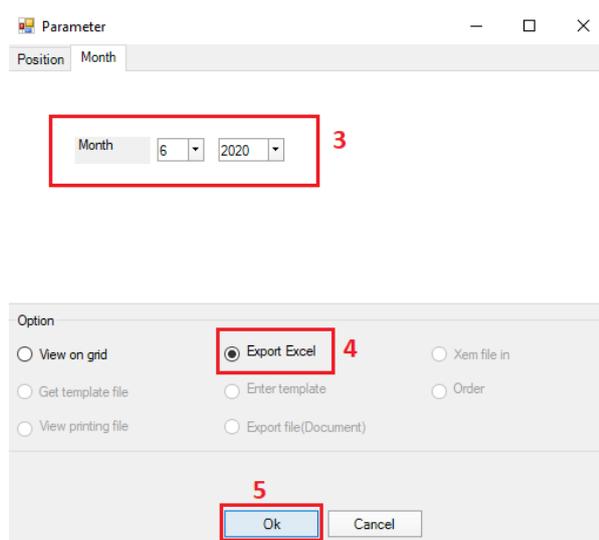
VIII.3.5

d. Instructions to edit, delete and export data

To edit, delete and export data to Excel file, follow the instructions in section **II.3, II.4, II.5, II.6.**