# HRM OS- Quick Start Guide

After finishing the setup you can follow this quick start guide to start working with the HRM OS application.

STEP 01 - Login

Already an admin and staff account has been created. You can just log in using username: admin, password: admin. After login change your username and password.
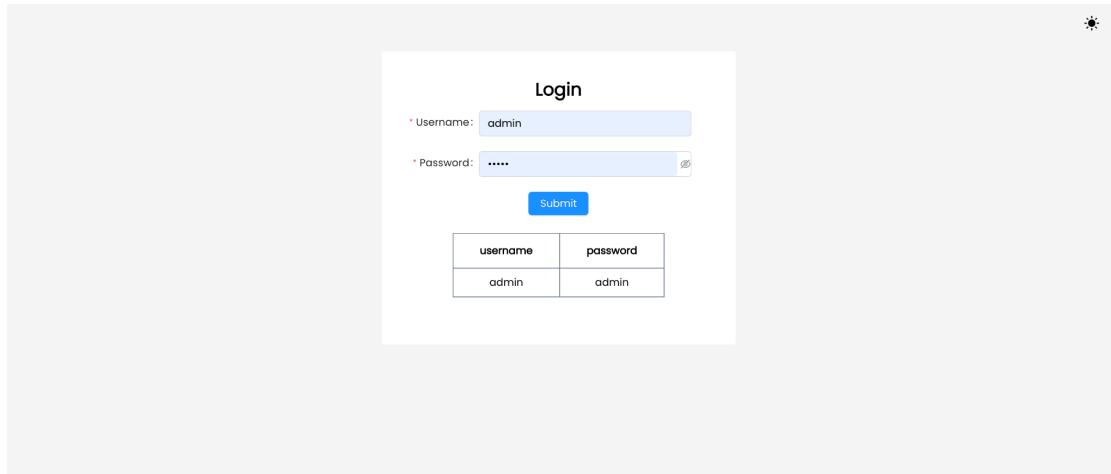
STEP 02 - Dashboard

You will see the dashboard after logging in. You can find your business summary here. From the dashboard, you will get your company's total salary, employee number, present, and leave and absent employee numbers. Also can see the announcements and public holidays.
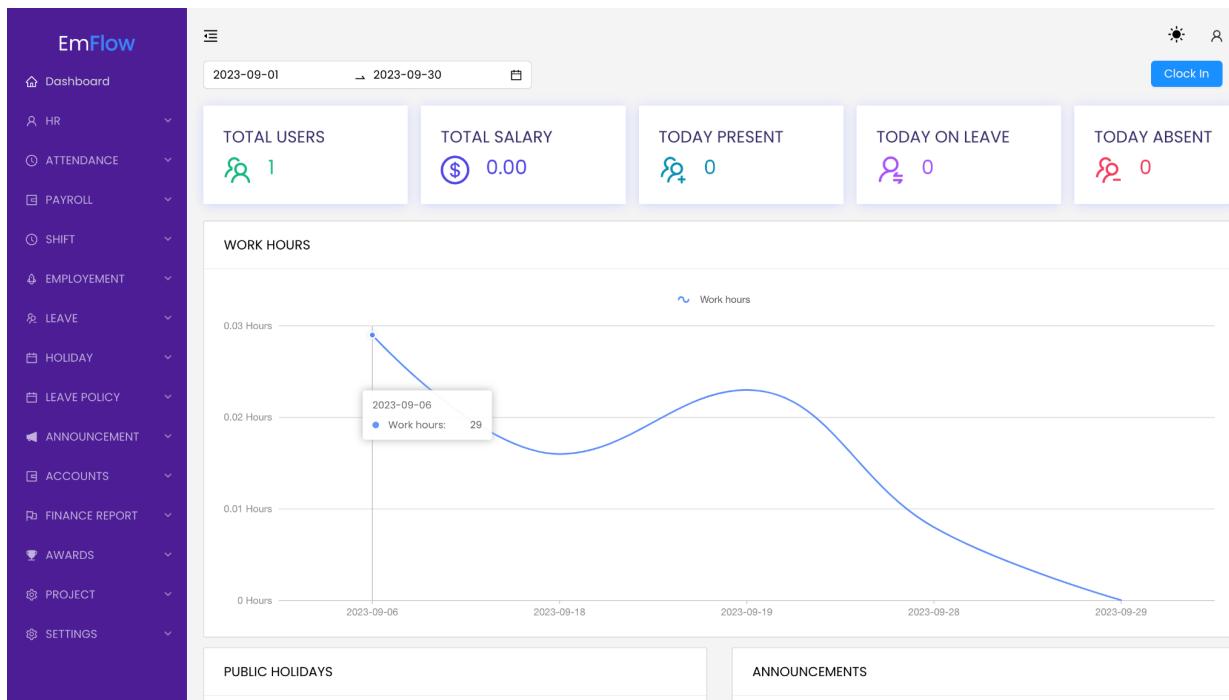
STEP 02 - Project management, Milestone, Task, Team, Kanban view

You can do all your project management-related things here. Create a project and milestones within the project. Create an individual team. Create a task and assign team members to the task. View all the things at a glance in a Kanban board.

Screen 1: Add TaskPriority

Add TaskPriority

* TaskPriority Name: [Enter TaskPriority Name]

[Submit]

Task Priority Column List

ID	Name	Action
1	LOW	
2	MEDIUM	
3	HIGH	

< 1 >

Sidebar navigation:
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  - Add Milestone

Screen 2: Add Team To Project

EmFlow

Add Team To Project

* Project Name: [Select Project]
* Team Name: [Team Name]
* Team Member/s: [Select Team Member/s]

[Submit]

Team List

ID	Team Name	Action
1	Team OS	

< 1 >

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EmFlow

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Add New Team Member : Team OS

* Member : [Select Member]

[Submit]

Project : Test project   **Team :** Team OS   **Project Manager :** OMEGA SOLUTION

ID	Name	Action
1	omega solution	👁

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- ▤ PAYROLL ⌄
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- ▼ AWARDS ⌄
- ⚙ PROJECT ⌃
  - ⚙ Add Project
  - ⚙ All Project
  - ⚙ Team
  - ⚙ Task Priority
  - ⚙ Add Milestone

Add Milestone in Project

* Project : Test project ⌄
* Milestone Name : milestone 1
* Start Date : 2023-09-01
* End Date : 2023-09-09
* Milestone Description : no
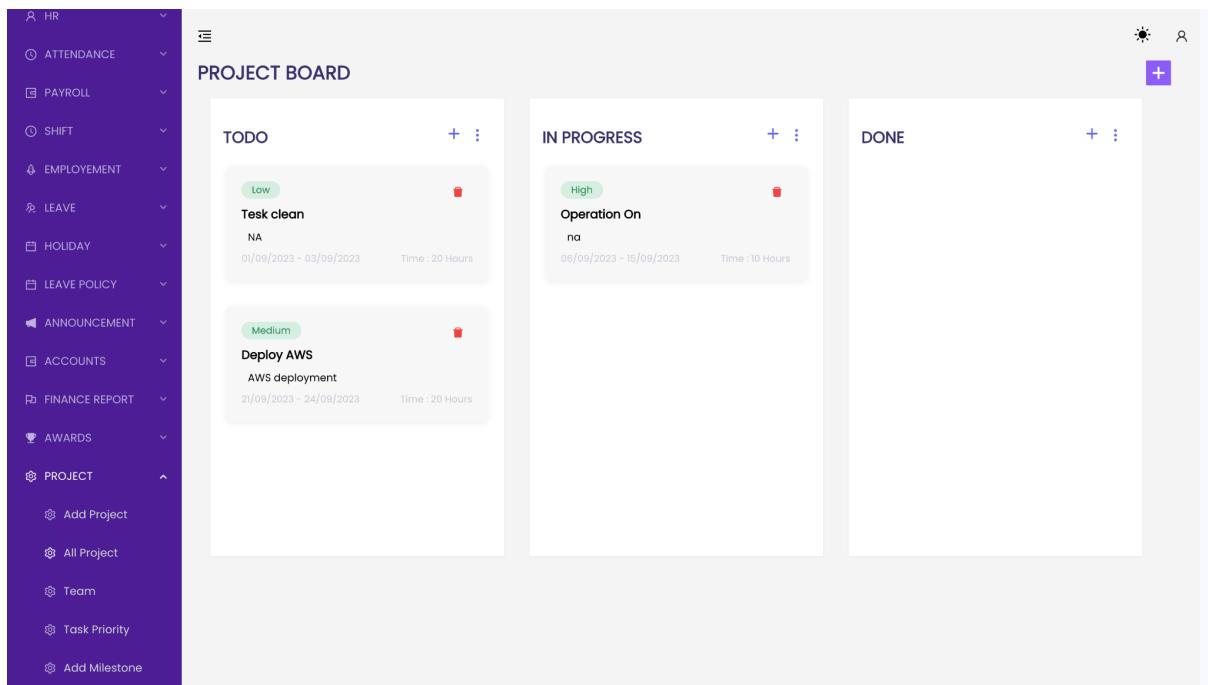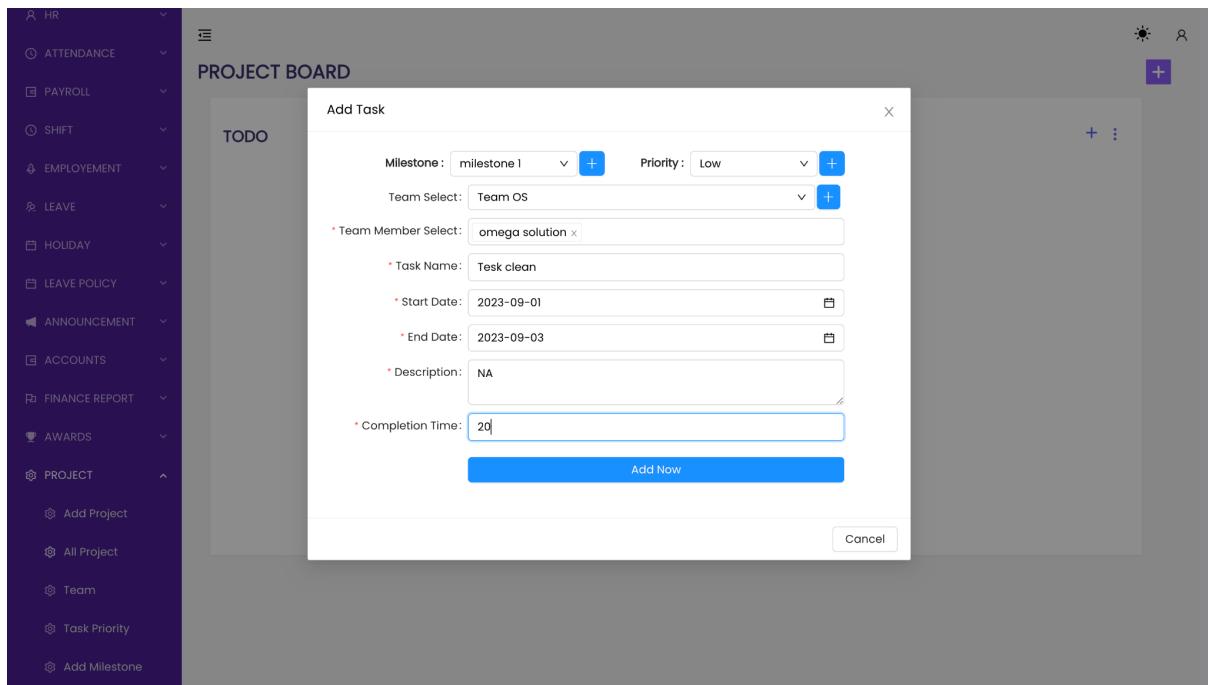
[Add Milestone]

Add Task (Modal)

Add Task ×

Milestone : milestone 1 +
Priority : Low +
Team Select : Team OS +
* Team Member Select : omega solution ×
* Task Name : Tesk clean
* Start Date : 2023-09-01
* End Date : 2023-09-03
* Description : NA
* Completion Time : 20

Add Now

Cancel

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PROJECT BOARD

TODO + ⋮

Low 🗑
Tesk clean
NA
01/09/2023 - 03/09/2023   Time : 20 Hours

Medium 🗑
Deploy AWS
AWS deployment
21/09/2023 - 24/09/2023   Time : 20 Hours

IN PROGRESS + ⋮

High 🗑
Operation On
na
08/09/2023 - 15/09/2023   Time : 10 Hours

DONE + ⋮

Sidebar

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PROJECT BOARD

TODO

Low
Tesk clean
NA
01/09/2023 - 03/09/2023   Time : 20 Hours

Medium
Deploy AWS
AWS deployment
21/09/2023 - 24/09/2023   Time : 20 Hours

IN PROGRESS

DONE

High
Operation On
na
06/09/2023 - 15/09/2023   Time : 10 Hours
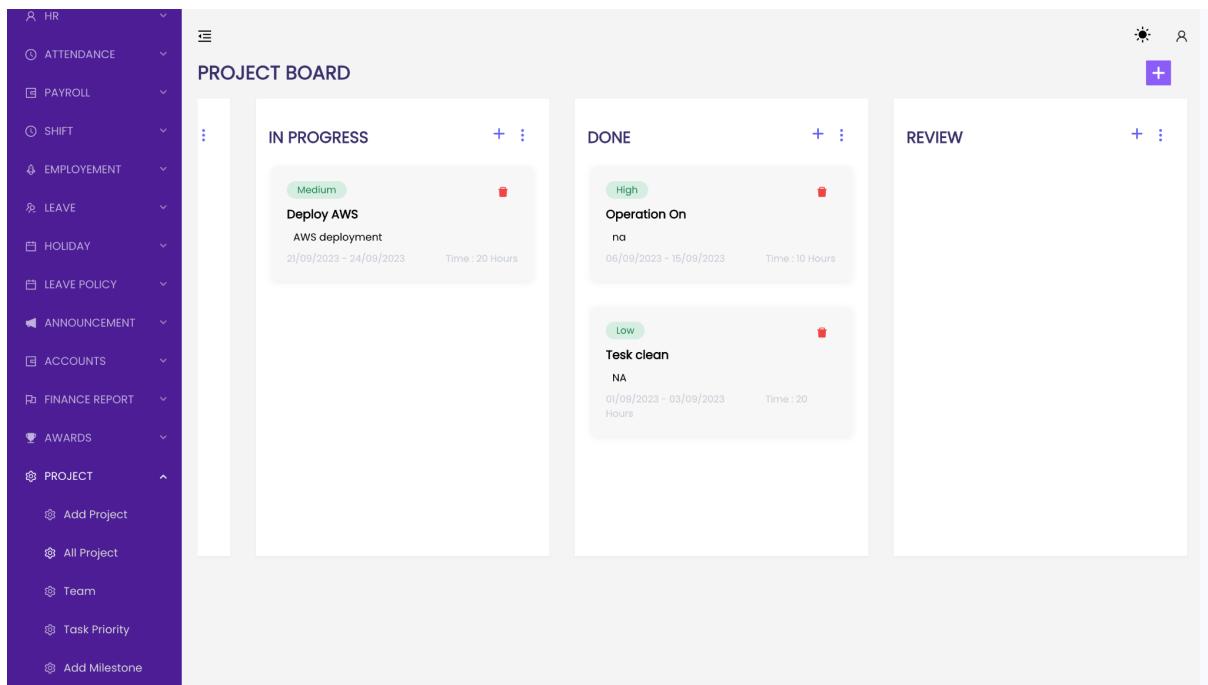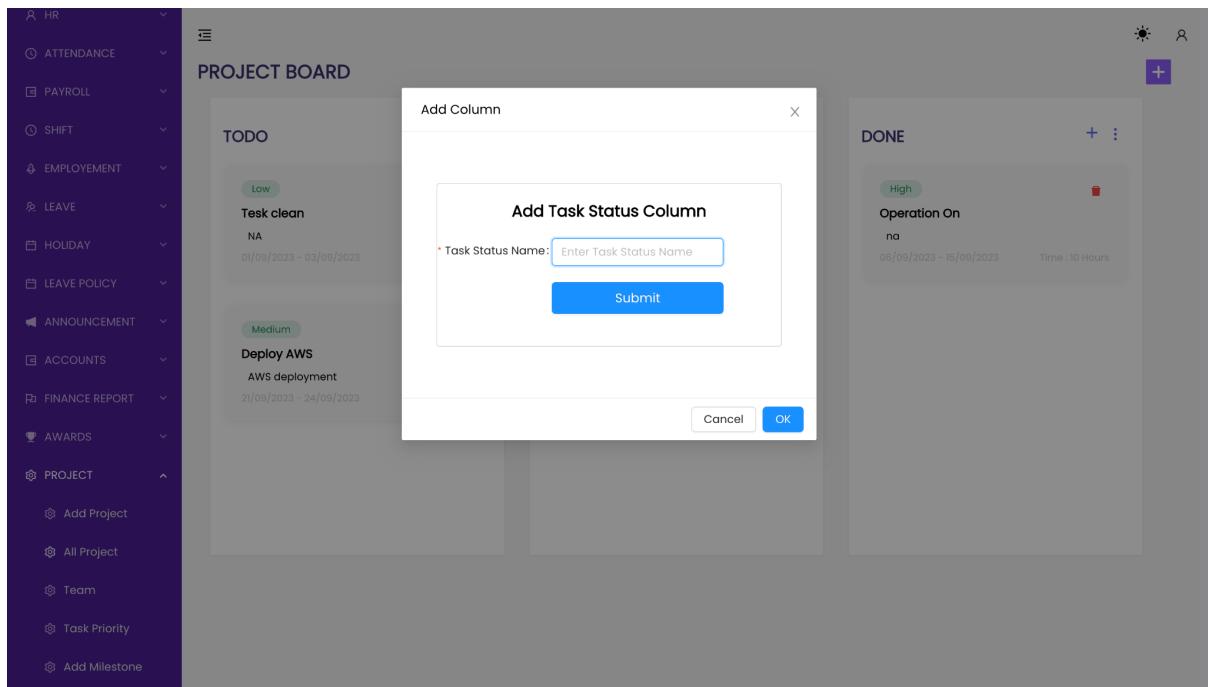
STEP 03 - Create new employee and view employee data

From the left sidebar under the **HR** menu, you can create new employee, view employee list, view single employee data and manage the **Role**, **Designation** and **Department** of the employee.

STEP 04 - Self attendance & Manual attendance

From the top right corner, the user can check in and check out by clicking the button. If anyone forgets to do self-attendance then the HR person can manage the manual attendance. You can also see the attendance list, work hours, and status by filtering any date range.

STEP 05 - Payroll & Payslip

You can generate month-wise payroll and by making necessary changes you can then generate the payslip. All the details regarding workdays, workhour, holidays, salary, bonuses, and deduction-related data will be available on the payslip. All the calculations will be generated automatically.

STEP 06 - Shift & Employment status manage

You can create shift defining the time and assign the shift to an employee. Also, you can create Employment status and assign the status to an employee. The shift will be used for calculating employees' daily workhour and then monthly workhour.

STEP 07 - Accounts, Transactions, Financial Statements

You can also create accounts and make transactions. All your salary payment transaction and other expenses will show up here with account wise balance. Also can see your financial statements etc.

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Add Account

* Name: [Name]

* Account Type: [Select Account Type]

[Add New Account]

Accounts List

[Download CSV]

[Column Selected ▾]

ID	Account	Account Type	Action
1	Cash	Asset	👁
2	Bank	Asset	👁
3	Inventory	Asset	👁
4	Accounts Receivable	Asset	👁
5	Accounts Payable	Liability	👁

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Balance Sheet

ACCOUNT	AMOUNT
Assets	
TOTAL	0
Liabilities	
TOTAL	0
Equity	
TOTAL	0
Total Liability and Equity	0

STEP 08 - Self leave application and Leave application management

Employees can apply for leave application mentioning the date, reason, and leave type (paid/unpaid). Then HR person can review the leave and accept or reject the application.
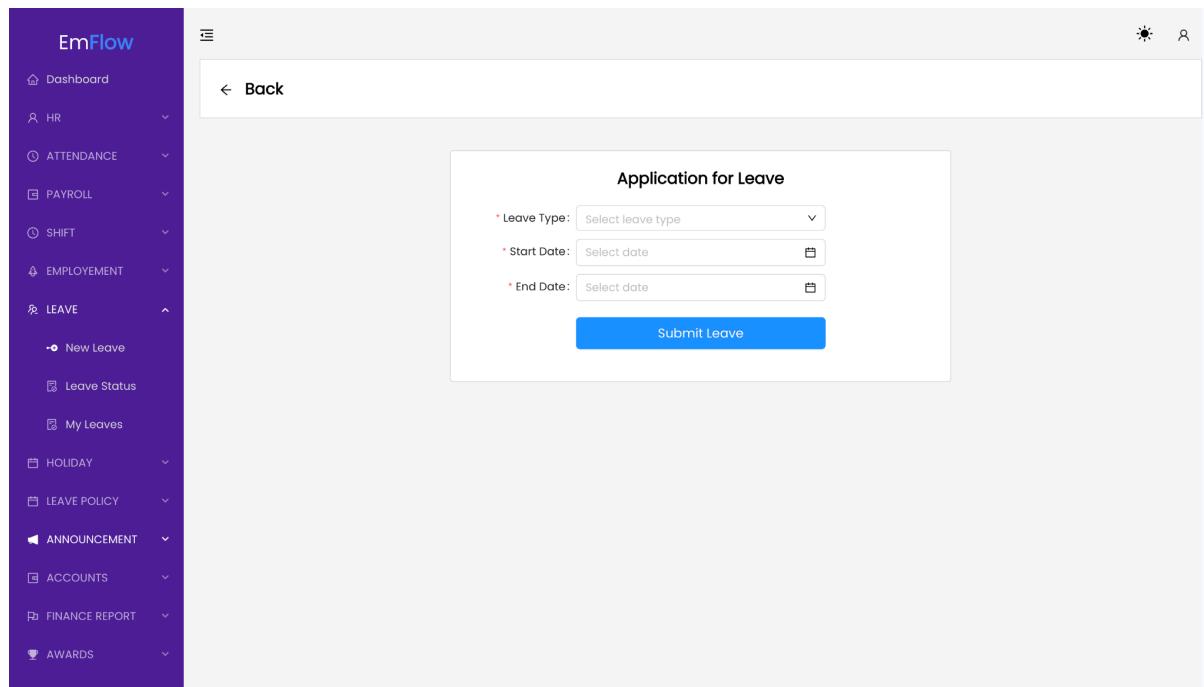
STEP 09 - Leave policy, Weekly Holiday, and Public holiday

You can create leave policy where you will mention the Paid and Unpaid leave for an employee for **a year**. Also, you will create Weekly holiday which defines the start and end date of the work week for an employee. Then you will assign this Leave policy and Weekly holiday to a user. This will be considered calculating the employee's salary and work hours. You can also create public holidays which will show up in the dashboard.

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Add Weekly Holiday

* Name : `Saturday-Friday`
* Start Day : `Select Start Day`
* End Day : `Select Start Day`

Add Weekly Holiday

Weekly Holiday List

[Column Selected ▾]   **Download CSV**

ID	Name	Start Day	End Day	Action
1	Saturday-Thursday	Saturday	Thursday	👁
2	Sunday-Friday	Sunday	Friday	👁

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Add Public Holiday

* Name : `New Year`
* Date : `Select Date`

Add Public Holiday

Public Holiday List

[Column Selected ▾]   **Download CSV**

ID	Name	Date	Created At	Action
1	New Year	29/09/2023	29/09/2023	👁
2	Independence Day	02/10/2023	29/09/2023	👁
3	Christmas	08/10/2023	29/09/2023	👁

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STEP 10 - Announcements and Awards management

You can create announcements for the employee which will show up in the dashboard. Also, you can create awards and assign awards to employees.

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Please email us if you need any help with using the application. We will assist you as soon as possible and in most cases within 1 day. Customer satisfaction is the most important thing that we care about.

CONTACT INFORMATION:
Website: solution.omega.ac
Email: support@omega.ac
Customer Support https://support.omega.ac