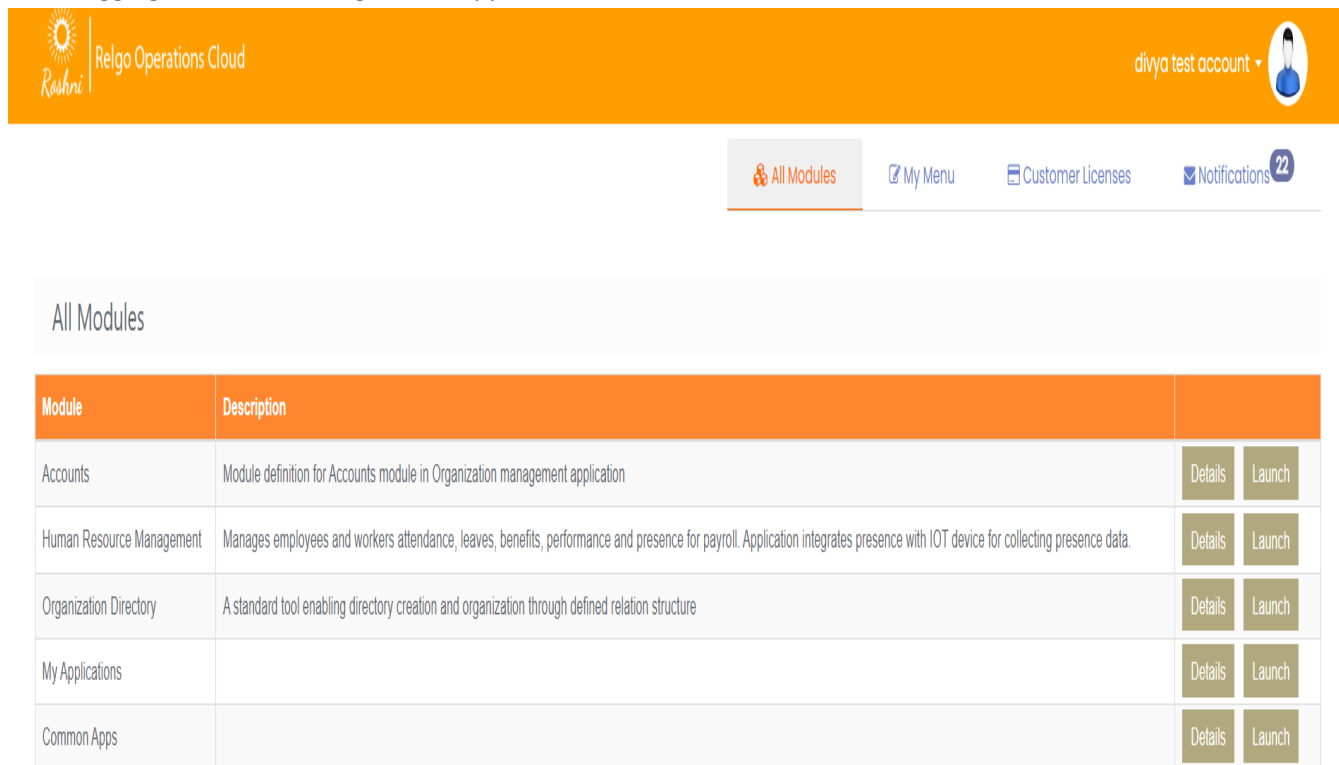


Organization Directory

Organization Directory contains structure of organization and its users added as employee/customer/vendor with roles that can in turn access the application based on the permission of the role assigned along with employee's hierarchy.

- Create Account in **Relgo Solution Portal**
- Identity cast must be generated for that account.
- Must be able to login to Relgo solution portal with generated identity cast.

After logging to ROC following screen appears.



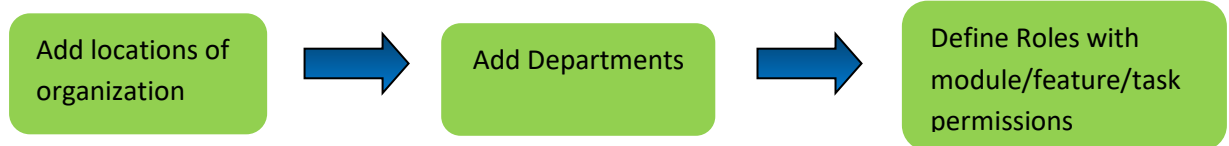
The screenshot shows the Relgo Operations Cloud interface. The header includes the Relgo logo and 'Relgo Operations Cloud' on the left, and 'divya test account' with a user profile icon on the right. Below the header is a navigation bar with 'All Modules' (selected), 'My Menu', 'Customer Licenses', and 'Notifications' (with a badge of 22). The main content area is titled 'All Modules' and contains a table with the following data:

Module	Description	
Accounts	Module definition for Accounts module in Organization management application	Details Launch
Human Resource Management	Manages employees and workers attendance, leaves, benefits, performance and presence for payroll. Application integrates presence with IOT device for collecting presence data.	Details Launch
Organization Directory	A standard tool enabling directory creation and organization through defined relation structure	Details Launch
My Applications		Details Launch
Common Apps		Details Launch

Click on **Launch** button of **Organization Directory**, a menu appears in a new tab.

Organization Directory	X
Organization Management	▼
Setup	▼
Onboarding	▼
Profiles	▼

Organization Setup:



Add Location:

In this User can add the location of the organization where it is located and also it is used to assign location to employee while on-boarding.

User Level: Admin / Employee with task permission

Path: Organization Management ---> Setup ---> Add Location

Add Location

Helps to add the location by selecting the required field.

*Location Name

Chennai

Existing Locations

Select Some Options

Address

No. 283/3 & 283, 6A, Sixth Floor, Prince Infocity II, 4, Rajiv Gandhi Salai, OMR, Kandhanchavadi, Chennai, Tamil Nadu 600096

Country

India

City

Chennai

State

Tamil Nadu

Postal Code

600096

*Phone Number

8578985784

*Geo Tagid

Latitude : 12.9685 Longitude: 80.2490

Add Location

- In this step user will define the location with the details such as address, city pin code, country and state.
- In additional there is option to add **geo tag id** to locate the location by entering latitude and longitude values which will be useful in location integration with attendance devices.

Organization Management ---> Setup ---> View Locations

Organization Directory		OrganizationManagement / Setup / View Locations							
Organization Management		Search						Copy CSV Excel PDF Print	
Location Name	Address:	Country	City	State	Postal Code	Phone Number	Geo Tagid:	Action	
1 Chennai	No. 283/3 & 283, 6A, Sixth Floor, Prince Infocity II, 4, Rajiv Gandhi Salai, OMR, Kandhanchavadi, Chennai, Tamil Nadu 600096	India	Chennai	Tamil Nadu	600096	8578985784	Latitude : 12.9685 Longitude: 80.2490		

Showing 1 to 1 of 1 entries

Previous 1 Next

Add Department:

In this user can add new department to the Organization.

User Level: Admin / Employee with task permission

Path: Organization Management ---> Setup ---> Add Department

Organization Directory		OrganizationManagement / Setup / Add Department	
Organization Management			
<h3>Add Department</h3> <p> Helps to add the department.</p>			
*Department Name	<input type="text" value="Dev Dept"/>		
Description	<input type="text" value="Includes group of people that work together to create software. This is complex, creative work that requires"/>		
		<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

In the figure user can add the department details, which includes the Department Name, Description. Fill all the details and click on "**Add**" to add the Department.

Organization Management ---> Setup ---> View Departments

Organization Directory X OrganizationManagement / Setup / View Departments

Organization Management Organization Management

Search Copy CSV Excel PDF Print

Department Name	Description	Action
1 Dev Dept	Includes group of people that work together to create software. This is complex, creative work that requires adaptability as technical challenges arise and business requirements evolve.	

Showing 1 to 1 of 1 entries Previous 1 Next

Add Role:

In this user can define / add the organization roles along with task permissions.

User Level: Admin / Employee with task permission

Path: Organization Management ---> Setup ---> Add Role

Organization Directory X OrganizationManagement / Setup / Add Role

Organization Management Organization Management

Add Role

Helps to add,view the new role in to the department by filling the details.

*Role Name Existing Roles

App Developer Select Some Options

Description

To translate software requirements into workable programming code and maintain and develop programs for use in business.

Select Modules

Human Resource Management X

Select Feature

Leave management X

Select Scenarios

Select Some Options

Tasks And Permissions

Leave management-Leave Approval-Approve
 Leave management-Leave Request-New Leave Request
 Leave management-Direct Report Of Self Attendance Requests-Attendance Request Status
 Leave management-Leave Policy-Delete
 Leave management-Leave Type-Delete

Select Feature

Leave management X

Select Scenarios

Select Some Options

Tasks And Permissions

<input type="checkbox"/>	Leave management-Leave Approval-Approve	<input type="checkbox"/>	Leave management-Leave Request-New Leave Request	<input type="checkbox"/>	Leave management-Direct Report Of Self Attendance Requests-Attendance Request Status	<input type="checkbox"/>	Leave management-Leave Policy-Delete	<input type="checkbox"/>	Leave management-Leave Type-Delete
<input type="checkbox"/>	Leave management-Leave Approval-Delete	<input type="checkbox"/>	Leave management-Leave Request Report-Approve Leave Request	<input type="checkbox"/>	Leave management-Leave Request Status-Leave Request Status	<input type="checkbox"/>	Leave management-Leave Policy-Leave Policy Form	<input type="checkbox"/>	Leave management-Leave Type-Leave Type
<input type="checkbox"/>	Leave management-Leave Approval-view Leave Approval	<input type="checkbox"/>	Leave management-View Leave Requests-View Leave Requests	<input checked="" type="checkbox"/>	Leave management-Leave Summary Report-Leave Summary Report	<input type="checkbox"/>	Leave management-Leave Policy-Update	<input type="checkbox"/>	Leave management-Leave Type-Update
<input type="checkbox"/>	Leave management-Leave Request-Delete	<input type="checkbox"/>	Leave management-Install Leave Management	<input type="checkbox"/>	Leave management-Leaves Summary-Generate	<input checked="" type="checkbox"/>	Leave management-Leave Policy-View Leave Policies	<input checked="" type="checkbox"/>	Leave management-Leave Type-View Leave Types

Action

Select Process

Select Some Options

Select AppSpace

Select Some Options

Save as Role Template Add Cancel

- In this screen the user has to enter the Role name and Description about the role. [?]
- The Existing roles displays the existing roles in the organization. [?]
- The respective tasks and permissions for the role can be selected and click on "Add" to add the role.

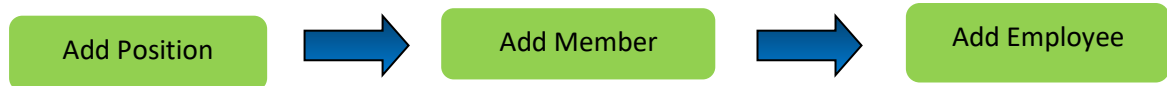
Organization Management ----> Setup ----> View Role

Organization Directory		OrganizationManagement / Setup / View Role						
Organization Management	X	Search		Copy	CSV	Excel	PDF	Print
Role Name	Description	Select Modules:	Select Feature:	Action				
1 App Developer		Human Resource Management	Leave management					
Showing 1 to 1 of 1 entries						Previous	1	Next

By the above view user can view the different roles and there is option to search, edit and delete the roles if required.

On boarding Process:

Here first any new person i.e., customer/vendor/new joiner is added as a member. If background verification of new joiner is successfully completed then he/she shall be converted to employee of the company.



Add Position:

- In this User can add New Position for the defined roles
- A hierarchy interlink will be established between the selected role and defined position.

User Level: Admin / Employee with task permission

Path: Organization Management ---> Onboarding ---> Add Position

The screenshot shows a web application interface. On the left is a sidebar with 'Organization Directory' and 'Organization Management'. The main header is 'OrganizationManagement / Onboarding / Add Position'. The main content area is titled 'Add Position' with a help icon and text 'Helps to add position of employees.'. Below this are two input fields: '*Position Name' with the value 'Dev 1' and 'Description' which is empty. At the bottom right are 'Add' and 'Cancel' buttons.

Organization Management ---> Onboarding ---> View Position

Organization Directory X OrganizationManagement / Onboarding / View Positions

Organization Management v

Search

Copy CSV Excel PDF Print

	Position Name	Description	Action
1	Dev 2		  
2	Dev 1		  

Showing 1 to 2 of 2 entries

Previous 1 Next


Add Member:

Add new member, member can be either customer or vendor or employee before joining/verification. This is to maintain data and give permissions to members.

Organization Directory X OrganizationManagement / Onboarding / Add Member

Organization Management v

Add Member

 Helps to add and view the members by filling the below details.

*First Name

*Last Name

*Email Address

*Phone Number

Role's

Position's

Manager's

Contact Address

*Location Name

	<input type="text"/>
*Phone Number	<input type="text"/>
Role's	Select Some Options
Position's	Select an Option ▼
Manager's	Select an Option ▼
Contact Address	<input type="text"/>
*Location Name	<input type="text"/>
Relation Type	<input type="text"/>
*Employee Code	<input type="text"/>
*Member Group	Select an Option ▼

Select Tasks And Permissions.

Add Member

Add Employee:

- In this User can add new employee selecting the appropriate department, roles and Positions
- User will have to enter different modules like payroll details, CTC, Personal details, and other important aspects.

User Level: Admin / Employee with task permission

Path: Organization Management ---> Onboarding ---> Add Employee

Professional Details

*Employee Code	<input type="text" value="20001"/>	Employee Photo	<input type="button" value="Choose File"/> No fil...osen
*Employee Name	<input type="text" value="Krishna"/>	Manager	<input type="text" value="Sadhana Sharma"/>
Employee Surname	<input type="text" value="Manohar"/>	RFID Number	<input type="text" value="200001"/>
*Email Address	<input type="text" value="krishna.manohar1@relgo.cor"/>	*Password	<input type="text" value="*****"/>
Date of Joining	<input type="text" value="01/19/2023"/>	Location Of Work	<input type="text" value="Select Some Options"/>
*Select Department	<input type="text" value="Dev Dept"/>		
*Role	<input type="text" value="App Developer"/>	*Position	<input type="text" value="Dev 1"/>

Payroll Details

Current Annual CTC	<input type="text"/>	PF No.	<input type="text"/>
Current Monthly Gross Salary	<input type="text"/>	HRA	<input type="text"/>
ESI No.	<input type="text"/>	Employee Type	<input type="text" value="Select an Option"/>
Member status	<input type="text" value="Permanent"/>	Add Salary Template Details ?	<input type="text" value="YES"/>
Select Salary Template	<input type="text" value="Select an Option"/>		

Personal Details

Educational Details

Career & Professional Details

Organization Management ---> Onboarding ---> View Employees

Organization Directory X															
OrganizationManagement / Onboarding / View Employees															
Search											Copy	CSV	Excel	PDF	Print
Employee Code	Employee Name	Manager	Employee Surname	Email Address	Date Of Joining	Select Department	Role	Position	Employment Status	Select Salary Template					
1	200002	Sadhana	Krishna Manohar	Sharma	sadhana.sharma@relgo.com	01/03/2022	Dev Dept	App Developer	Dev 2	Permanent					
2	200001	Krishna	Krishna Manohar	Manohar	krishna.manohar@relgo.com	01/01/2022	Dev Dept	App Developer	Dev 1	Permanent					

Showing 1 to 2 of 2 entries

Previous 1 Next

Employee Licenses:

In this User can assign licenses to employee based on roles.

User Level: Admin / Employee with task permission

Path: Organization Management ---> Onboarding ----> Employee Licenses

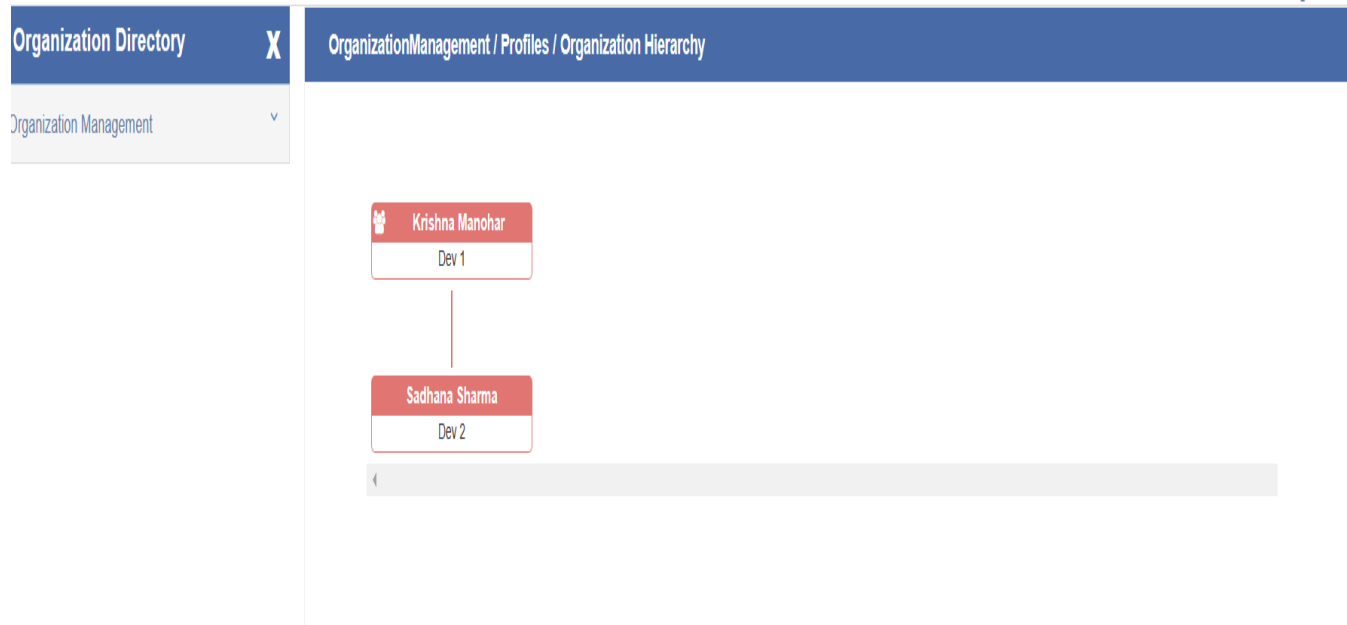
Organization Directory X	
OrganizationManagement / Onboarding / Employee Licences	
Organization Management v	
Customer Licences	
Select Employee	Select an Option v
*Select Employee Role	Select Some Options
*Select Role Modules	Select Some Options
Project Name	Select an Option v
Licence Type	Select an Option v
Licence key	Select an Option v
Licence Status	Select an Option v
<input type="button" value="Add"/>	

Organization Hierarchy:

Here user can view all employees hierarchical chart of an organization.

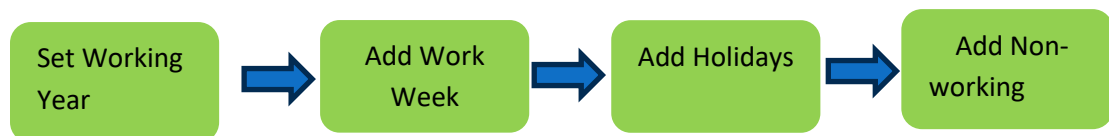
User Level: Admin / Employee with task permission

Path: Organization Management ---> Profiles ---> Organization Hierarchy



The screenshot shows a web application interface for 'Organization Hierarchy'. The top navigation bar is blue and contains 'OrganizationManagement / Profiles / Organization Hierarchy'. On the left, there is a sidebar with 'Organization Directory' and 'Organization Management'. The main content area displays a hierarchical chart with two levels: 'Krishna Manohar' (Dev 1) at the top level, and 'Sadhana Sharma' (Dev 2) at the bottom level, connected by a vertical line.

- **Working Year Setup:**



Set Working Year:

This form is helping the company keep track of an employee's tenure. It's a way to keep a record of how long someone has been employed by the company.

User Level: Admin / Employee with task permission

Path: Organization Calendar ---> Working Year Setup ---> Set Working Year

Set working year form is as follows

Human Resource Management	X
Organization Directory	▼
App Configurations	▼
Organization Calendar	▼
Working Year Setup	▼
Set Working Year	
View Working Year	
Add Work Week	
View Work Week	
Add Holidays	
View Holidays	

Set Working Year

💡 Helps to set the schedules for the year by selecting the required fields.

*Select Year	<input type="text" value="Select an Option"/>
*From	<input type="text" value="Select an Option"/>
To	<input type="text" value="Select an Option"/>
Any Weekends/Holidays in between Leaves will be counted as a leave?	<input type="text" value="Yes"/>

Here Select Year in which year employee joins the company, then select from month and To Month and then give Yes/No of any weekend/holidays in between leaves will be counted as a leave and then click on **set** button.

You can see view of working year after adding the form.

Add Work Week:

This form helps the employees understand their work schedules, including how many hours they are expected to work in a typical week. It's a way to keep track of the regular hours an employee is available for work.

User Level: Admin / Employee with task permission

Path: Organization Calendar ---> Working Year Setup ---> Add Work week

Add work week form is as follows

Human Resource Management X

- Organization Directory
- App Configurations
- Organization Calendar
- Working Year Setup
- Set Working Year
- View Working Year
- Add Work Week**
- View Work Week
- Add Holidays
- View Holidays
- Add Non Working Days
- View Non Working Days
- Attendance Management

Add Work Week

Helps to add the work week by selecting the required fields.

*Select Year

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Here we have to select year in which year employee join in organization, give full day, half day or non-working day of the everyday of week and then click on **Add** Button.

You can see view of Add workweek form after adding the form.

Add Holidays:

This form helps the listing and keeping track of the days when the company or organization is officially closed, and employees don't need to work.

User Level: Admin / Employee with task permission

Path: Organization Calendar ---> Working Year Setup ---> Add Holidays

Add Holidays form is as follows

Human Resource Management	X
Organization Directory	▼
App Configurations	▼
Organization Calendar	▼
Working Year Setup	▼
Set Working Year	
View Working Year	
Add Work Week	
View Work Week	
Add Holidays	
View Holidays	

Add Holiday

💡 Helps to add the holidays list.

Day 

*Name Of Holiday

Description

Holiday type

Add Holiday

Cancel

Select date of Holiday, enter name of the Holiday and write description of the holiday and select the holiday type as optional or mandatory and then click on **Add Holiday** Button.

You can see view of Add Holiday form after adding the form.

Add Non-working days:

This form is helps recording and keeping a list of the days when employees are not expected to work. This information is handy for managing work schedules and planning time away from work.


User Level: Admin / Employee with task permission

Path: Organization Calendar ---> Working Year Setup ---> Add Non-working days

Add Non-working days form is as follows

Human Resource Management	X
Organization Directory	▼
App Configurations	▼
Organization Calendar	▼
Working Year Setup	▼
Set Working Year	
View Working Year	
Add Work Week	
View Work Week	

Add Non Working Day

 Helps to add the non working day.

*Select Year

Name of the Day

Day

Add

Here select year and enter name of the day of non-working day and then select date of the day from calendar and then click on **Add** Button.

You can see view of Add non-working day form after adding the form.