# easyHR User Manual

Build Gamma.008.001
Human Incubator Inc.
09 September 2026 · updated 18 October 2026

### What's new in the 18 October 2026 update

- **Rostering is an optional feature**, switched on per company by superadmin (9.1).
- **Roster and Roster Settings** — shift rosters for 24/7 teams such as hospitals and call centers: night shifts, two-shift and three-shift rotations, minimum headcount, rest-rule warnings, publishing to the DTR (9.2, 9.3).
- **Rostering Report and dashboard calendar** follow published rosters and approved changes; night shifts end on the next day (9.4).
- **Change Shift** — the DTR uses approved lines only; lines HR adds are approved by default (9.4).

Chapter 9 starts on page 94.

# Contents

**Before you start** 3

**1. Dashboard** 10
1.1 Dashboard 10

**2. Setup** 12
2.1 Company 12
2.2 Employee 15
2.3 Mandatory Tables 20
2.4 Shift 23
2.5 Year 25
2.6 Day Type 28
2.7 Other Income 29
2.8 Other Deductions 30
2.9 Users 31

**3. DTR (Daily Time Record)** 35
3.1 Leave Credits 35
3.2 Change Shift 36
3.3 Leave Application 37
3.4 Overtime Application 39
3.5 DTR 41

**4. Payroll** 44
4.1 Loans 44
4.2 Other Income 45
4.3 Other Deductions 47
4.4 Payroll 48

**5. Reports** 51
5.1 Mandatory Reports 51
5.2 Demographics 52
5.3 Payroll Worksheet 52
5.4 Payroll Worksheet Range 53
5.5 Payroll Summary Worksheet Report 54
5.6 Payroll Other Income 55
5.7 Payroll Other Deduction 56
5.8 Payroll Summary 57
5.9 Journal Voucher 58
5.10 Withholding Tax Monthly 59
5.11 ATM Bank Report 60
5.12 DTR Report 61
5.13 Bank Detail Report 62
5.14 Payslip Report 63
5.15 Payroll Other Income Payslip 64
5.16 SSS Loan 65
5.17 SSS Calamity Loan 66
5.18 Loan Summary Report 67
5.19 Loan Deduction Report 68
5.20 HDMF Loan Report 69
5.21 Leave Report 70
5.22 Tardiness Report 71

5.23 Absent Report 72
5.24 13th Month Pay Report 73
5.25 Training Report 74

**6. Employee Portal 76**
6.1 Employee Portal 76

**7. Settings 79**
7.1 System Tables 79
7.2 Settings 81
7.3 Employee History 82
7.4 System Integration 83
7.5 Audit Trail 83

**8. Additional screens 85**
8.1 Alphalist 85
8.2 Form 2316 86
8.3 Official Business Report 87
8.4 Geolocation Official Business Report 87
8.5 Geolocation Report 88
8.6 DTR Image Report 89
8.7 Rostering Report 90
8.8 Tax Exemption 91
8.9 DTR Import Logs 92

# Before you start

## What this manual covers

This manual describes **easyHR**, the cloud HR and payroll system of Human Incubator Inc. It was written from the running system, screen by screen: every illustration in it is a screenshot of easyHR itself, taken on build **Gamma.008.001**.

The manual is organised the way the product is organised. Each of the seven menus on the top bar becomes a chapter, and each screen inside that menu becomes a numbered section that tells you what the screen is for, how to reach it, what to do on it, and what you should see afterwards.

*A note about the illustrations.* The screenshots come from a demonstration company. Employee names, addresses, contact numbers, e-mail addresses, government numbers, company and branch names and photographs have all been replaced with obvious placeholders such as *DELA CRUZ, Employee 01*, *Sample Company Inc.* and *Branch 01*. Document numbers, dates, times and amounts are untouched, so the worked examples still add up.

## Who it is for

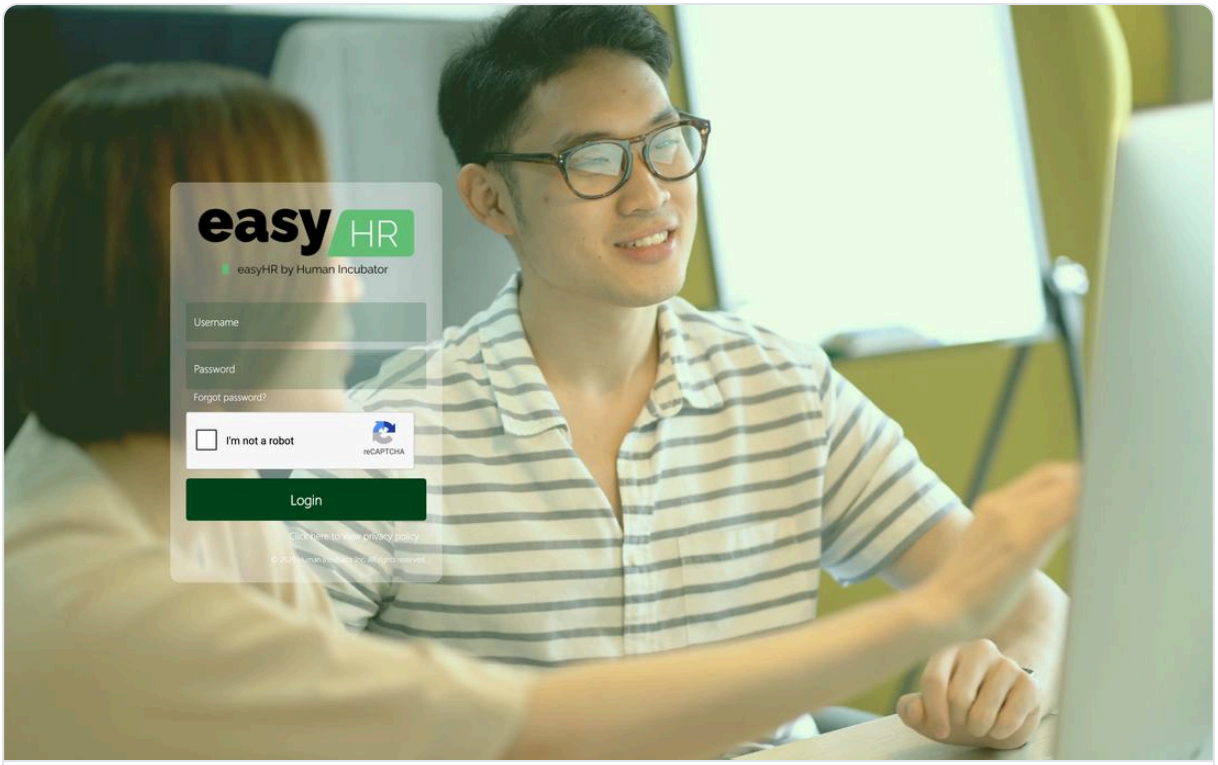
The manual is written for the people who run easyHR day to day: the HR officer who keeps the employee records, the timekeeper who prepares the daily time record, the payroll officer who computes and locks the payroll, and the administrator who sets the system up and gives people access. No technical knowledge is assumed.

## Signing in

easyHR runs in a web browser; nothing has to be installed. Open the address your administrator gave you — the demonstration system used for this manual is `https://preprod.easycloudhr.com/` — and the sign-in page appears.

1. Type your **Username** and **Password**. 2. Tick **I'm not a robot**. The **Login** button does nothing until this is ticked, and after three attempts without it the button is disabled for three minutes. 3. Click **Login**.

You land on the Dashboard. If you have forgotten your password, type your user name first and then click **Forgot password?** — the link uses the name in the box to find your account.




The sign-in page

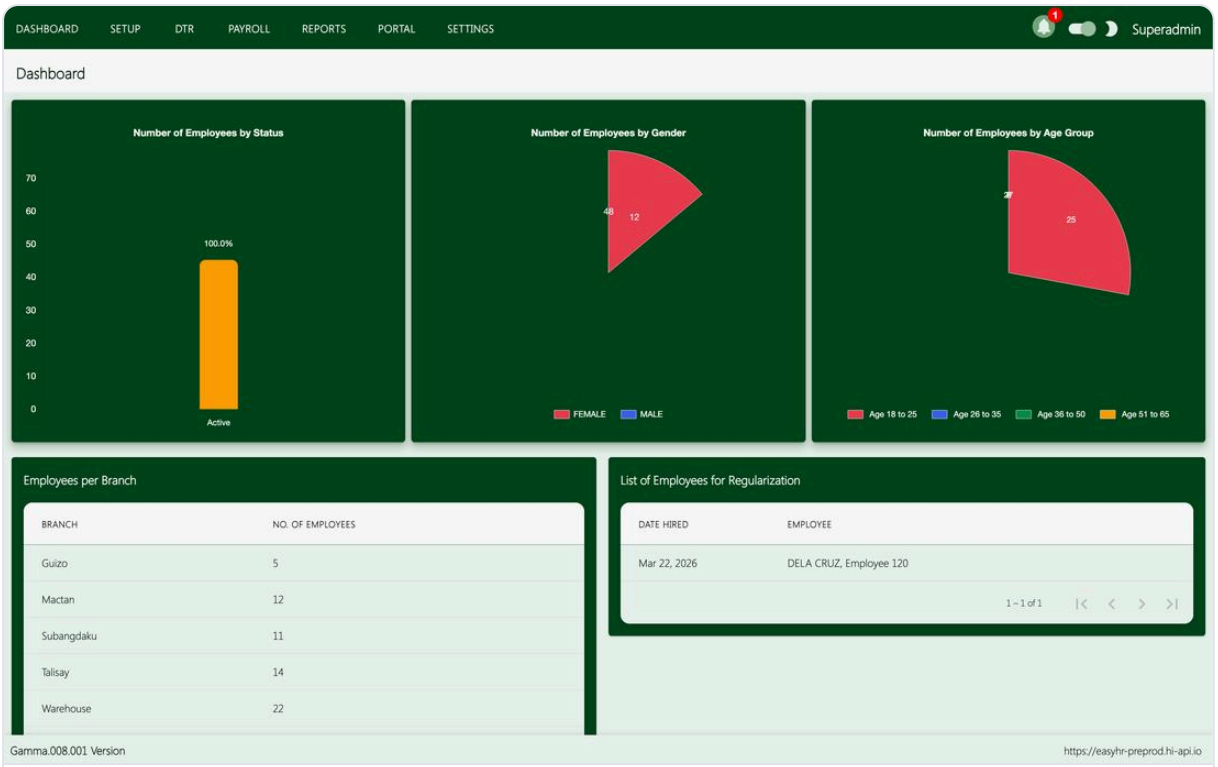
## The screen frame

Every screen has the same frame.

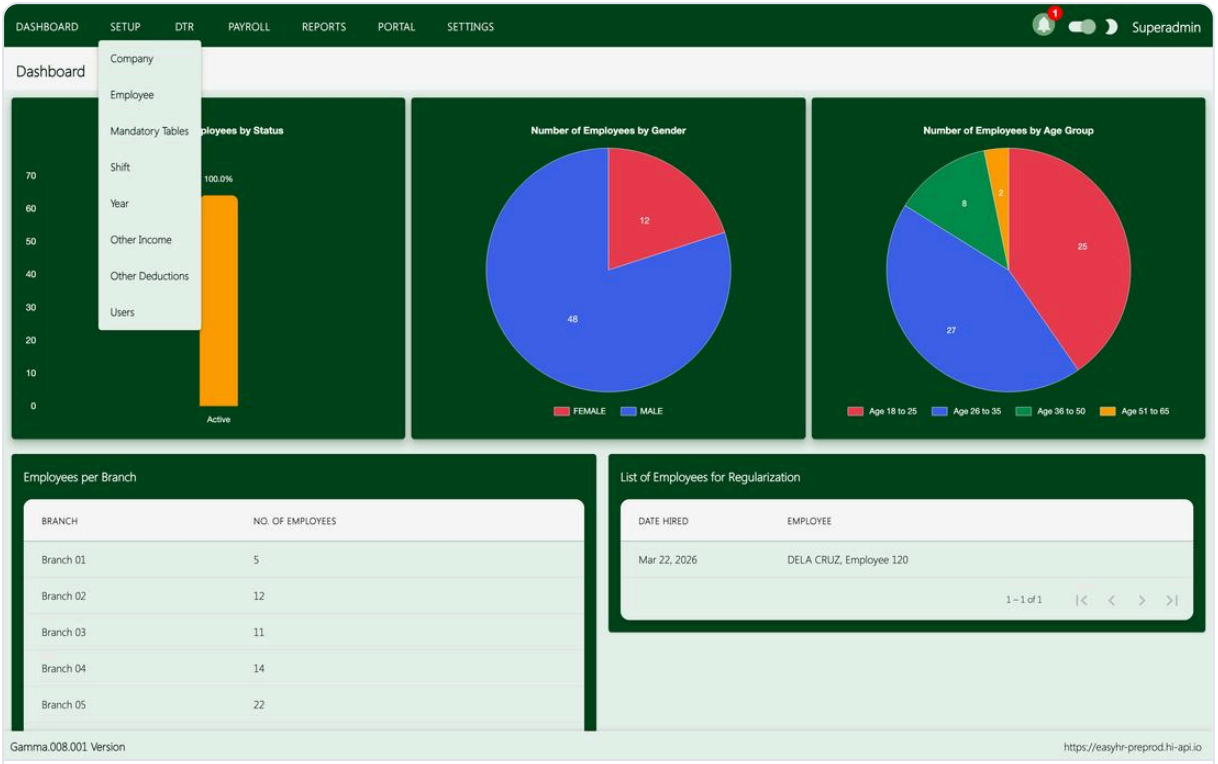
- The **top bar** carries the seven menus — Dashboard, Setup, DTR, Payroll, Reports, Portal and Settings. Click one and its screens drop down.
- At the right of the top bar are the **notification bell**, a **colour switch**, a **Dark mode** switch (the crescent moon) and **your user name**. Click your user name to sign out.
- The **page title** sits under the top bar on the left, and the buttons that act on the whole screen — **Add**, **CSV**, **Import**, **Save**, **Lock**, **Unlock**, **Close** — sit on the right of the same strip.
- The **footer** shows the build number of the system, which is worth quoting whenever you report a problem.

The screenshots in this manual were taken with Dark mode switched off.

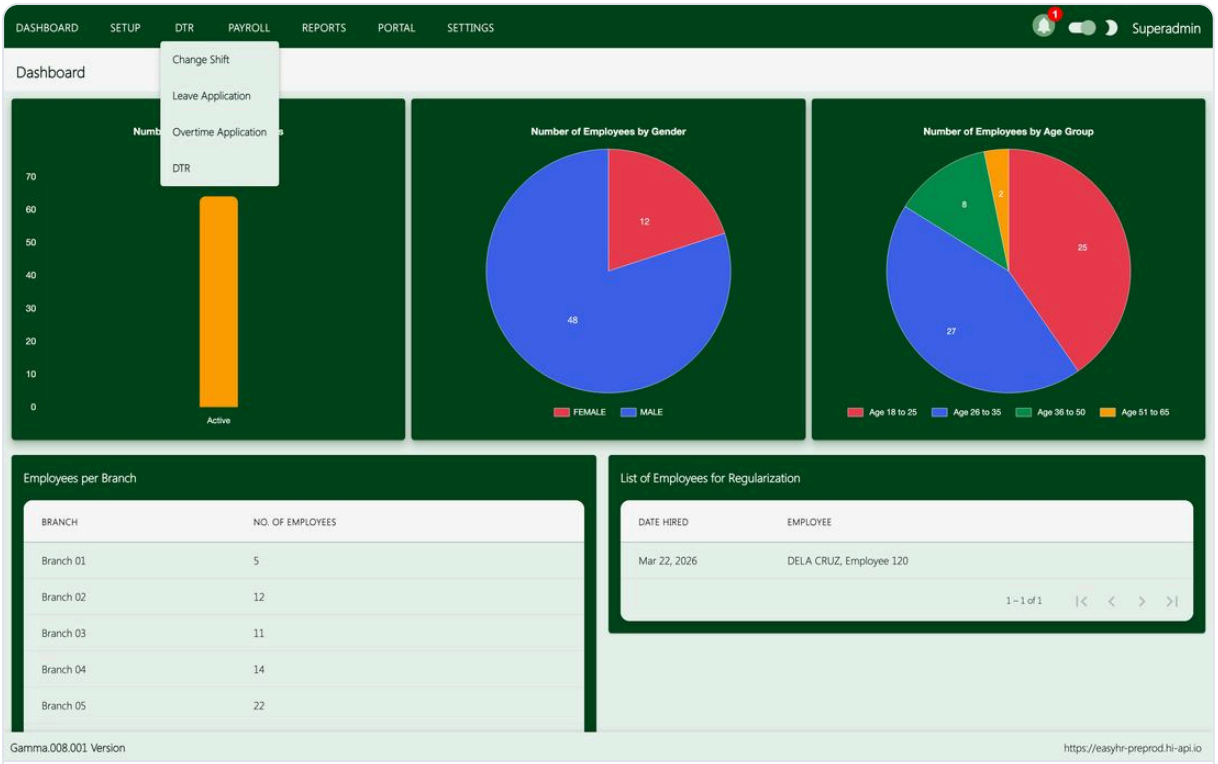
## THE SEVEN MENUS



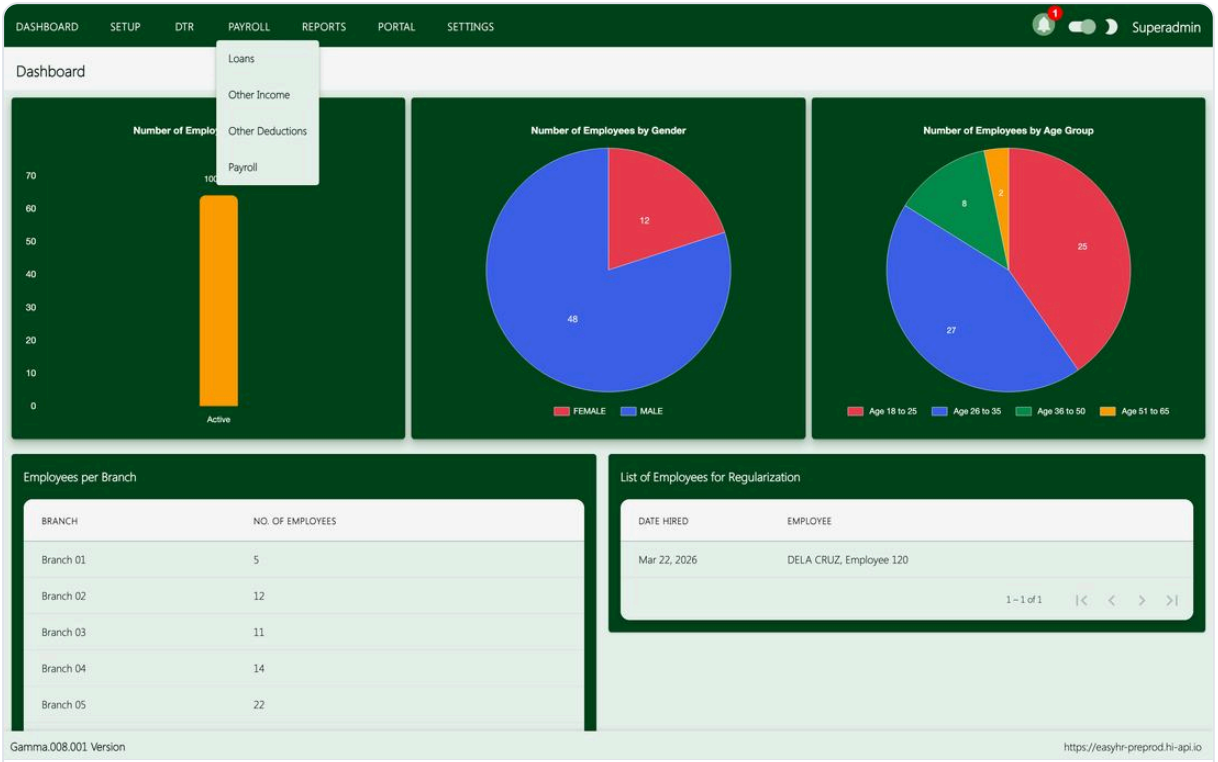

The DASHBOARD menu



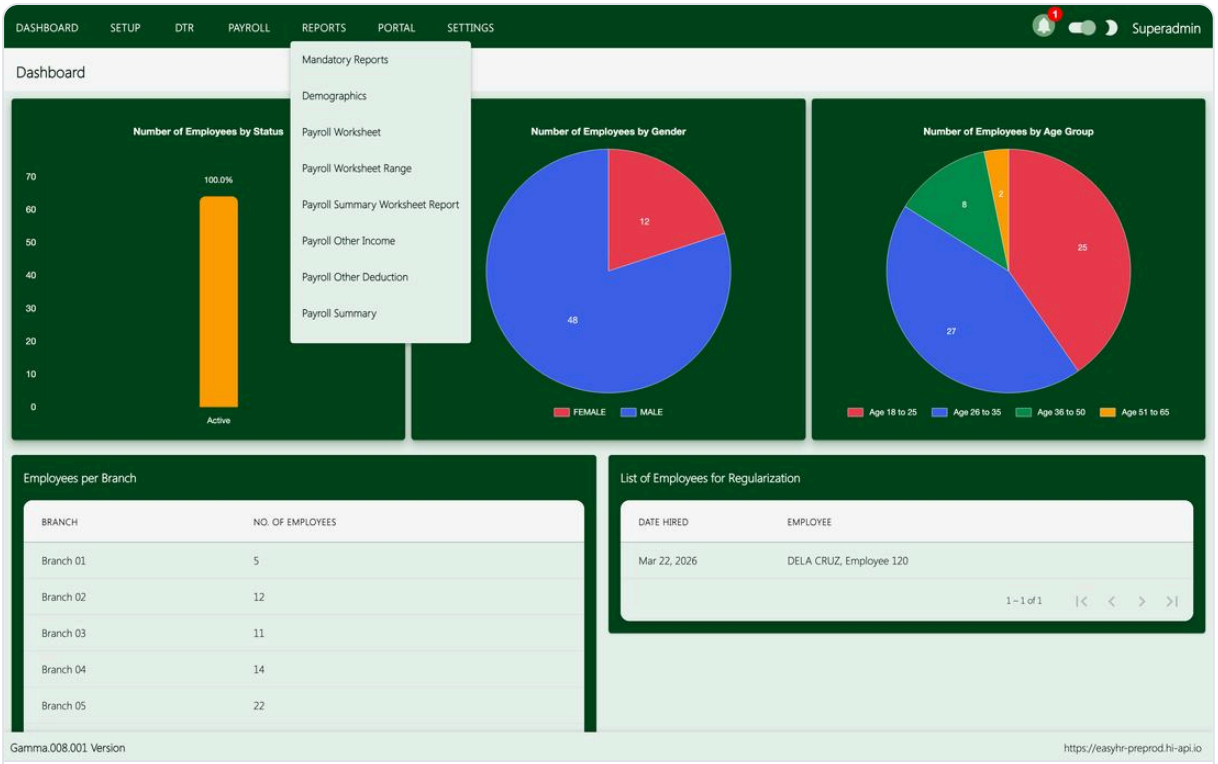

The SETUP menu



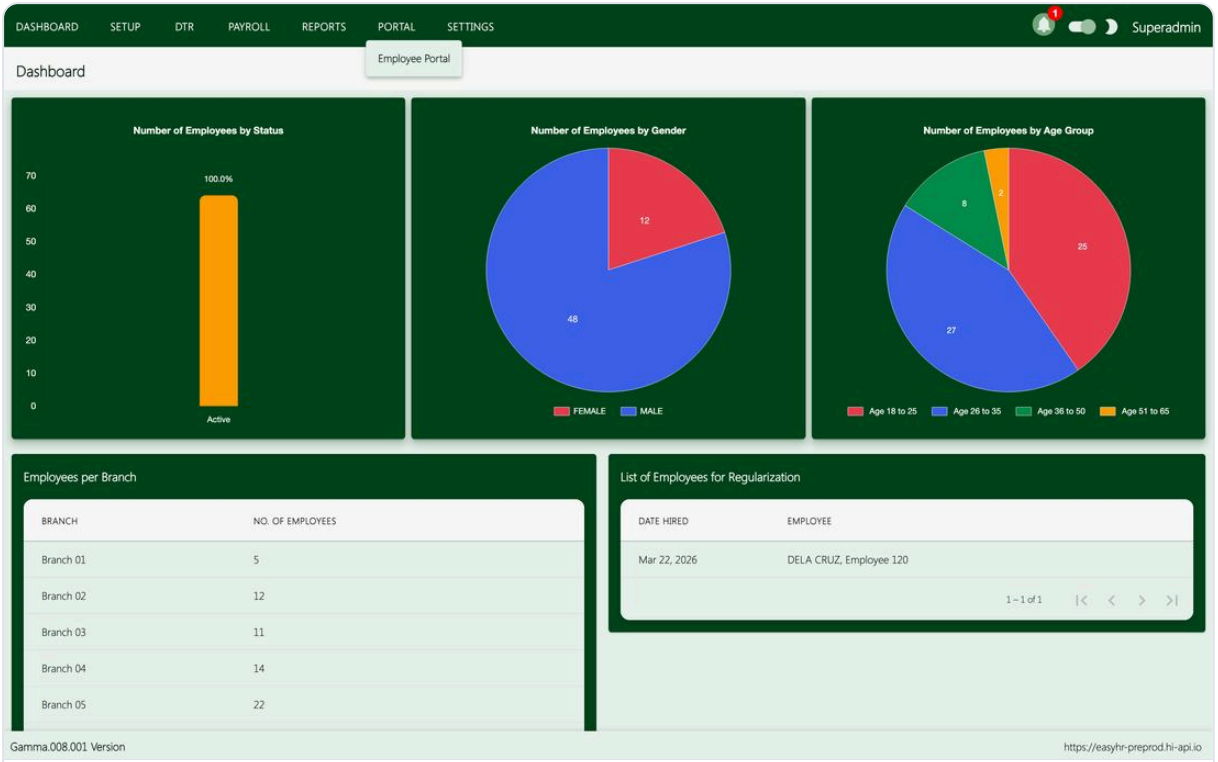

The DTR menu



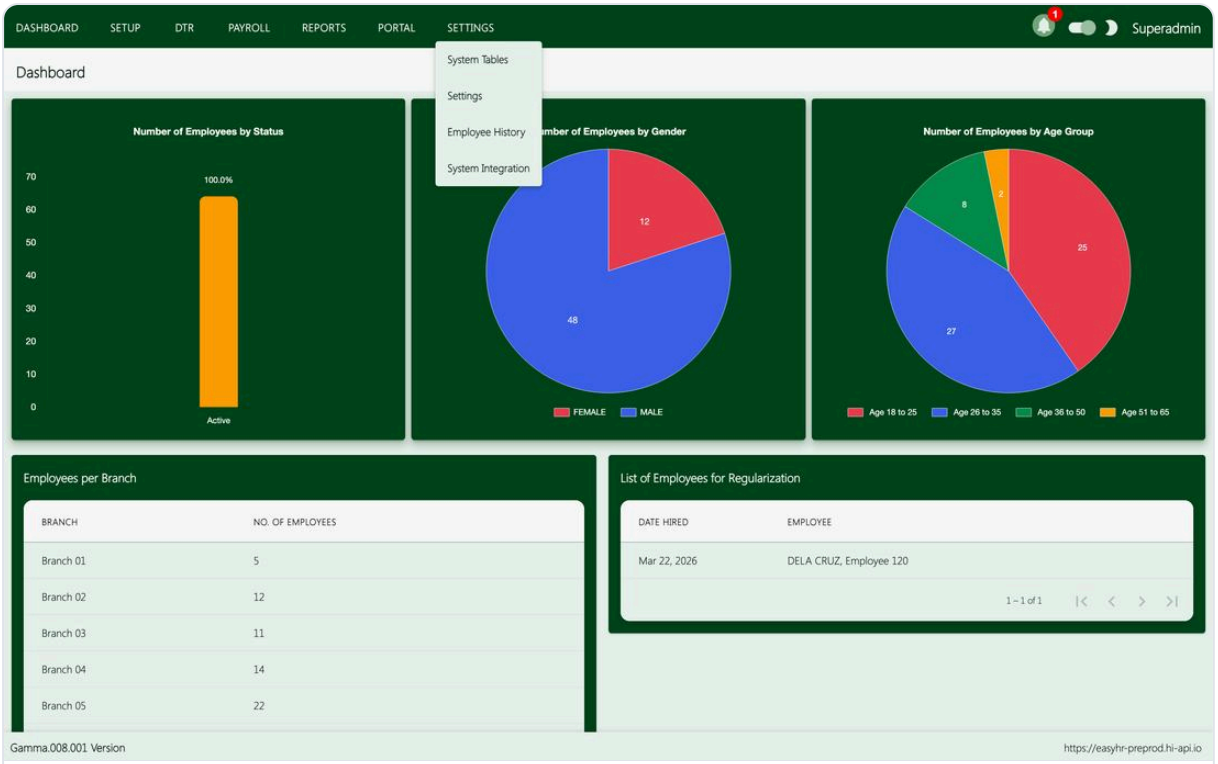

The PAYROLL menu




The REPORTS menu




The PORTAL menu



The SETTINGS menu

## List screens

Most screens open on a list. Lists behave the same way everywhere:

- Each row has an **Edit** button that opens the record, and a **Delete** button that removes it. A record that has already been used in a transaction cannot be deleted.
- The small funnel in a column heading filters that column.
- The bar under the grid moves through the pages — first, previous, next, last — and **Show** sets how many rows a page holds.
- **Add** creates a new record; **Close** leaves the screen.
- Where a list belongs to one payroll group, the **Payroll Group** box above the grid decides which records are listed. Change it and the grid reloads.

## Record screens

A detail screen shows one record. Simple records (a shift, a company) open in a dialog on top of the list; larger ones (an employee, a payroll) open as a screen of their own with **tabs** across the middle.

The buttons at the top right always mean the same thing:

- **Save** writes your changes. It stays greyed out until something changes, and while the record is locked.
- **Lock** finalises the record. A locked record cannot be edited, and in most modules only locked records are picked up by the next step — a payroll only sees a locked DTR, for example.
- **Unlock** re-opens a locked record so it can be corrected.
- **Close** returns to the list. Anything unsaved is lost.

## Reports

Every report works the same way. Choose what you want to see in the boxes at the top — typically **Payroll Group**, a **date range** or a **payroll period**, and sometimes a single **employee** — and then use the buttons on

the right:

- **View** builds the report and opens it in the built-in PDF viewer, from where it can be printed or saved.
- **CSV** downloads the same figures as a spreadsheet file.
- **Close** leaves the screen.

A report shows nothing until it is generated, and it can only show periods that have already been processed: a payroll report needs a locked payroll, a DTR report needs a locked DTR.

## Two habits that save work

Two habits will save you a great deal of work.

- **Lock what is finished, in order.** Change Shift, Leave and Overtime applications are locked before the DTR that consumes them; the DTR is locked before the payroll that consumes it; the payroll is locked before the payslips are printed. Unlocking a record that a later record already used forces you to redo the later record.
- **Do not edit the mandatory tables** unless the government has actually changed a contribution table. Those figures drive every deduction in the system.

## What this manual does not cover

Two things are deliberately not in this manual.

- **The output of the reports.** Every report screen is documented — where it is, what you choose on it, and what it produces — but the generated reports themselves are not reproduced. They are built by the server from the live records and carry real employees' names and pay, and unlike the screens they cannot be anonymised reliably, so no example of one is printed here.
- **Screens with no data behind them.** Three record screens — Day Type, Leave Credits and Tax Exemption — hold no records in the system this manual was written from, so they are described but not illustrated. Each says so on its own page.

Everything else that the Super Admin account can open in build Gamma.008.001 is covered: seven menus, fifty-nine screens, and the record screens and tabs behind them.

# 1. Dashboard

The first screen after signing in: a summary of the workforce, and the place to start from.

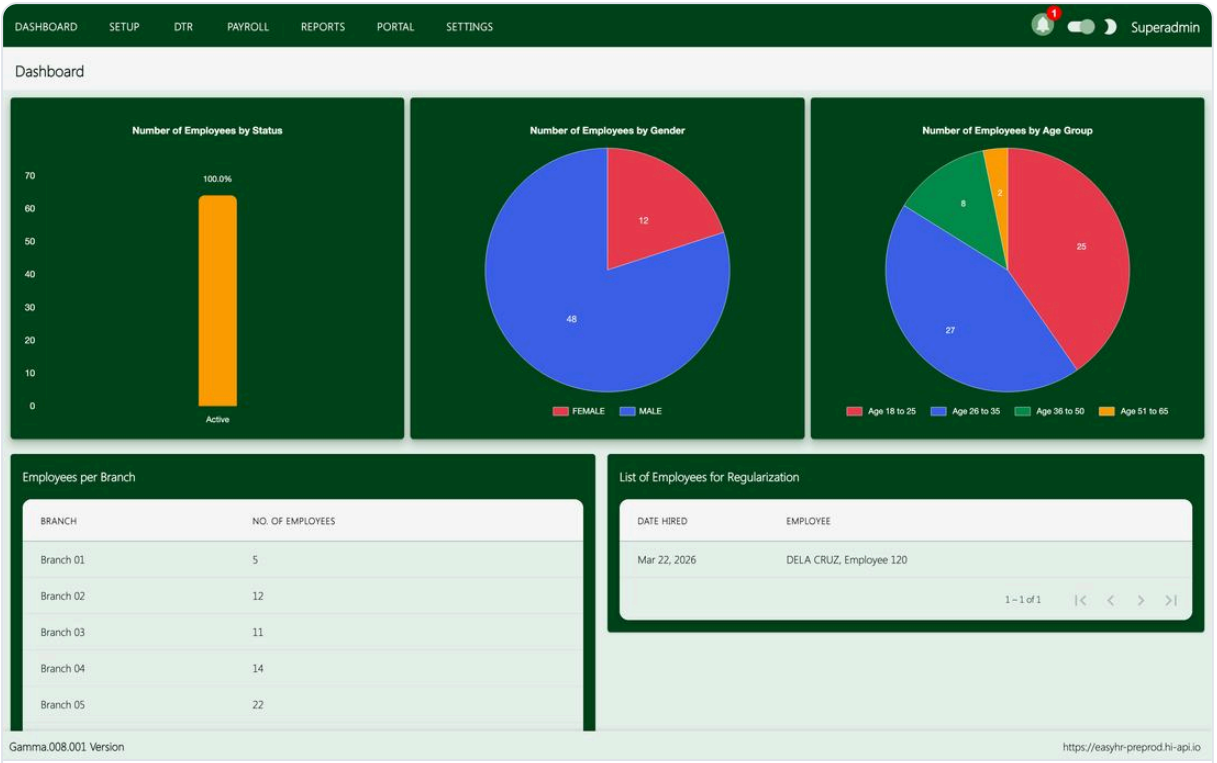
## 1.1 Dashboard

The Dashboard is the landing screen. It answers the questions a manager asks first thing in the morning — how many people do we employ, how are they split between branches, and who is due for regularisation — without opening a single report.

### HOW TO GET THERE

**DASHBOARD → Dashboard** `/software/dashboard`

> The menu entry for this screen is not shown in the demonstration environment. Whether it appears for you depends on your company's configuration and on your user rights.




Dashboard — the screen as it opens

### WHAT TO DO

1. Sign in. The Dashboard opens by itself.
2. To come back to it later, click **DASHBOARD** on the top bar.

### COLUMNS ON THIS SCREEN

BRANCH | NO. OF EMPLOYEES | DATE HIRED | EMPLOYEE

### WHAT YOU SHOULD SEE

Four panels: employees by status, by gender and by age group, the head count per branch, and the list of employees whose regularisation date is coming up.

### WORTH KNOWING

> The figures cover the whole company. There is no filter on this screen — use the Demographics report when you need the

> same information for one branch or one payroll group.

> The panels are read-only. Nothing on the Dashboard can be edited.

# 2. Setup

The master files. Everything else in easyHR depends on what is set up here, so this is the chapter to work through first when a company goes live.

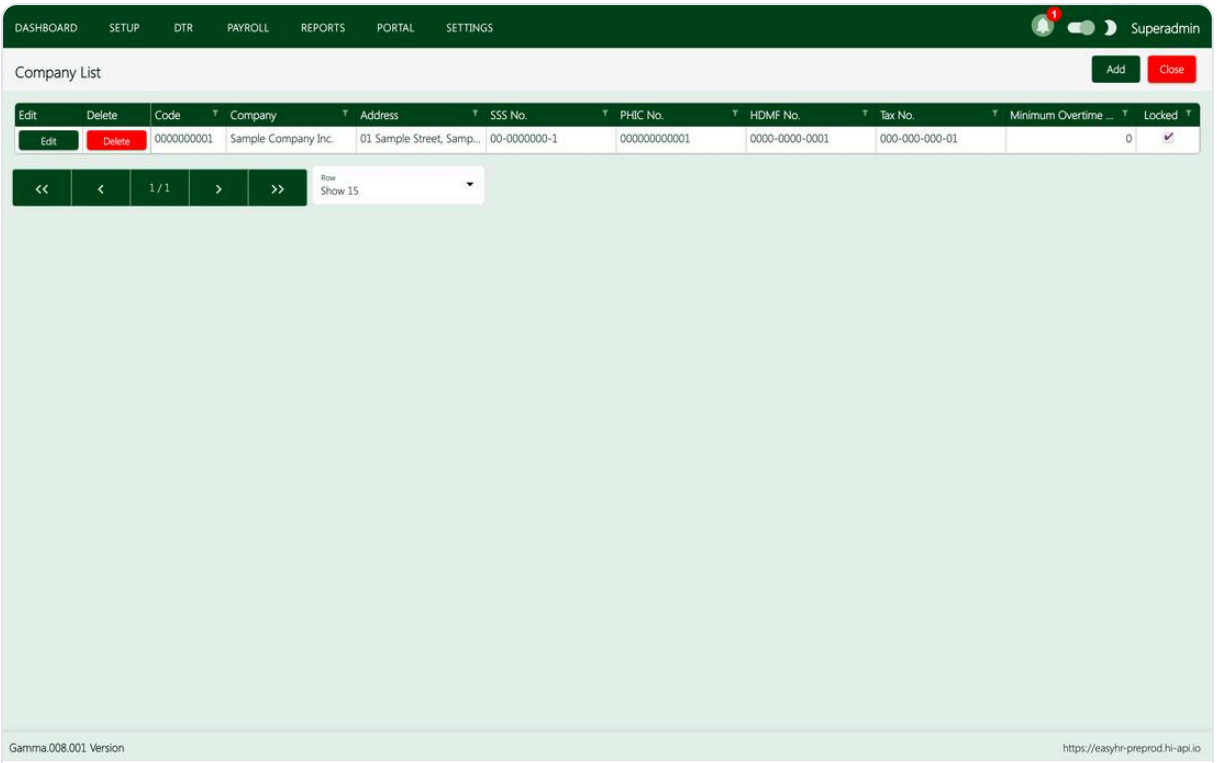
## 2.1 Company

The company record holds the employer's own details: its name and address, its SSS, PhilHealth, HDMF and BIR numbers, the accounts its contributions are posted to, who may approve applications, how pay is treated for tax and for the 13th month, and the announcement that greets employees in the portal.

Almost every other screen refers back to this record, so it is the first thing to set up.

### HOW TO GET THERE

**SETUP → Company** `/software/company-list`




Company — the screen as it opens

### WHAT TO DO

1. Open **SETUP → Company**.
2. Click **Edit** on the company you want to change, or **Add** to register another one.
3. On the **Detail** tab fill in the company name, the government numbers, the accounts each contribution is posted to, the address and the logo.
4. On the **Approver** tab add the people who may approve applications, one entry per branch.
5. On the **Settings** tab tick how each kind of pay behaves — whether it is taxable, whether it is shown on the payslip, and whether it counts towards the 13th month.
6. On the **Announcement** tab write the notice that employees see in the portal.
7. Click **Save**, then **Lock**.

### COLUMNS ON THIS SCREEN

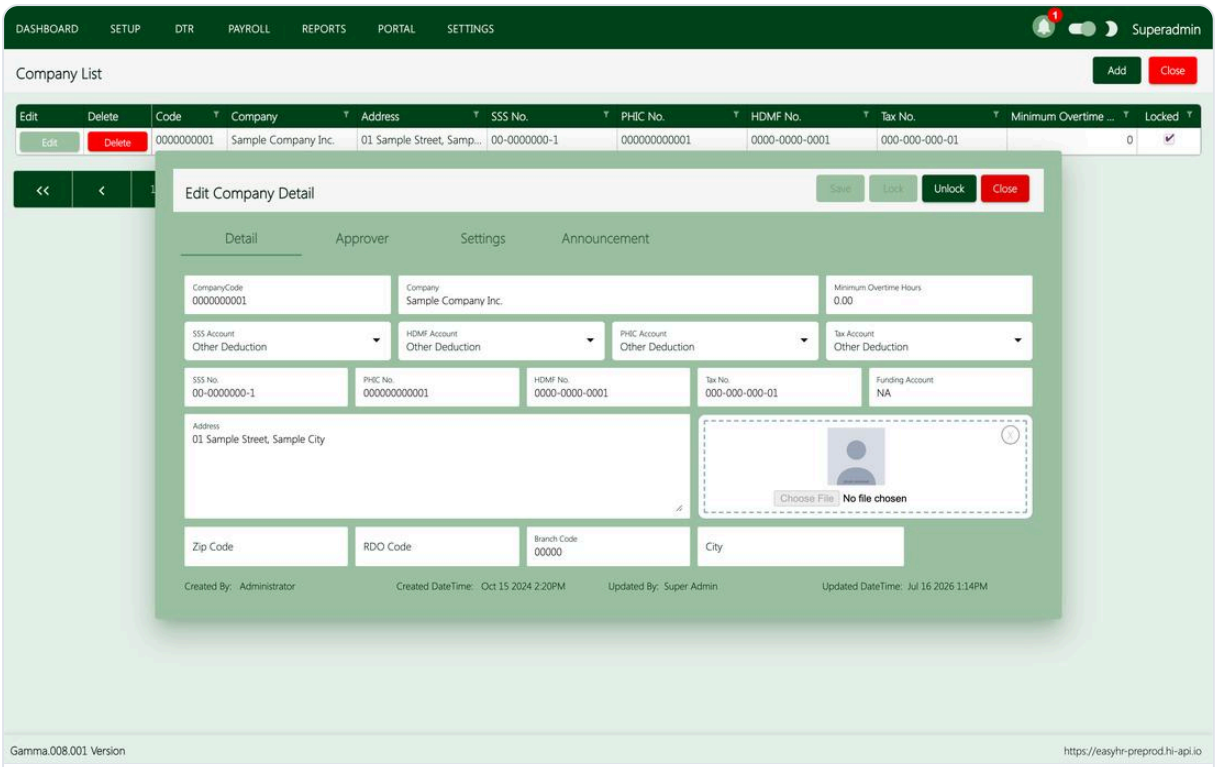
Edit | Delete | Code | Company | Address | SSS No. | PHIC No. | HDMF No. | Tax No. | Minimum Overtime Hours | Locked

### BUTTONS

Add | Close | Edit | Delete

### THE RECORD ITSELF

Click **Edit** on a row (or **Add** for a new record) to open the dialog.



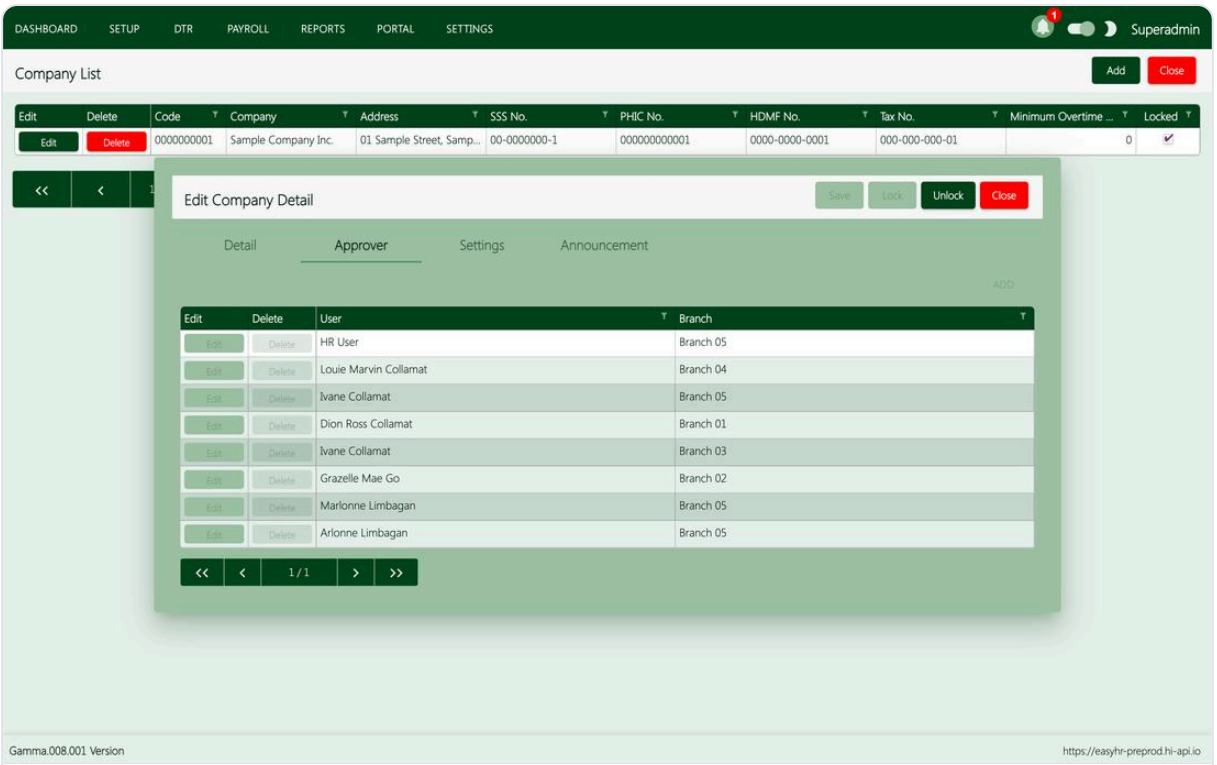

Company — the record

**Tabs:** Detail | Approver | Settings | Announcement

**Fields:** CompanyCode | Company | Minimum Overtime Hours | SSS Account | HDMF Account | PHIC Account | Tax Account | SSS No. | PHIC No. | HDMF No. | Tax No. | Funding Account | Address | Zip Code | RDO Code | Branch Code | City

**Buttons:** Add | Close | Edit | Delete | Save | Lock | Unlock | X

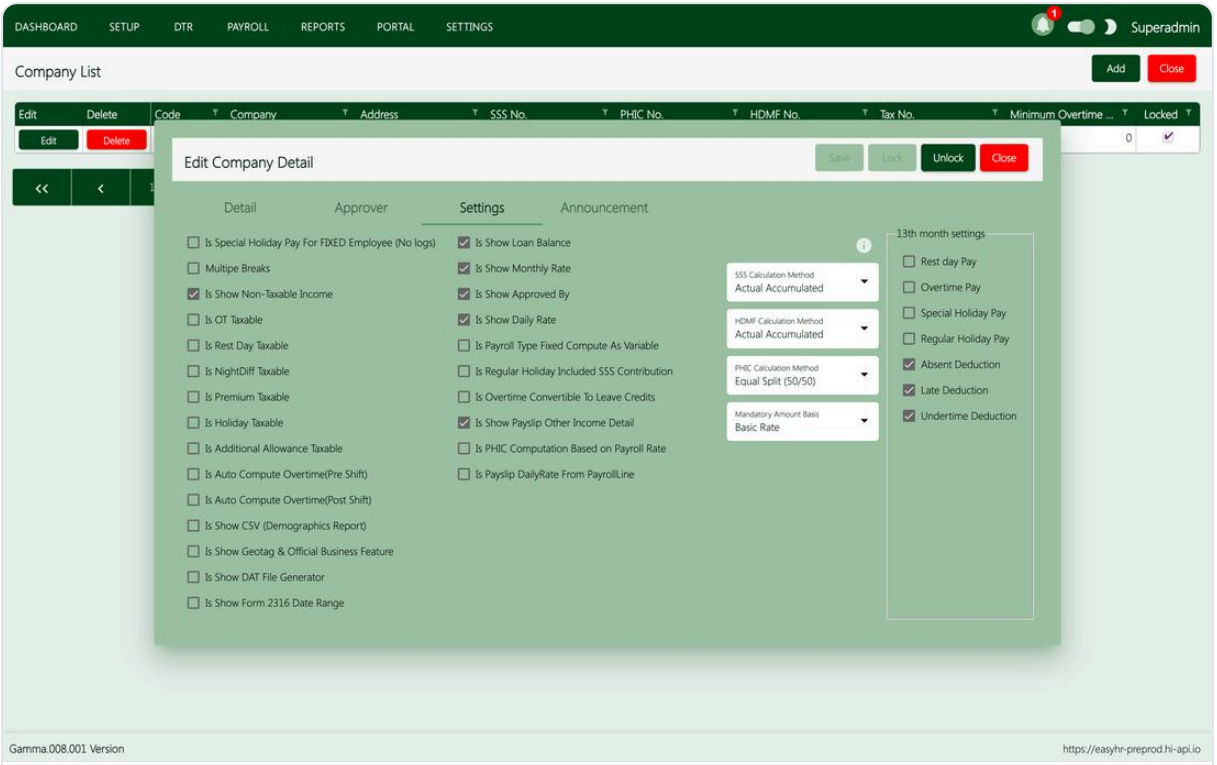
### APPROVER




Company — Approver tab

**Columns:** Edit · Delete · Code · Company · Address · SSS No. · PHIC No. · HDMF No. · Tax No. · Minimum Overtime Hours · Locked

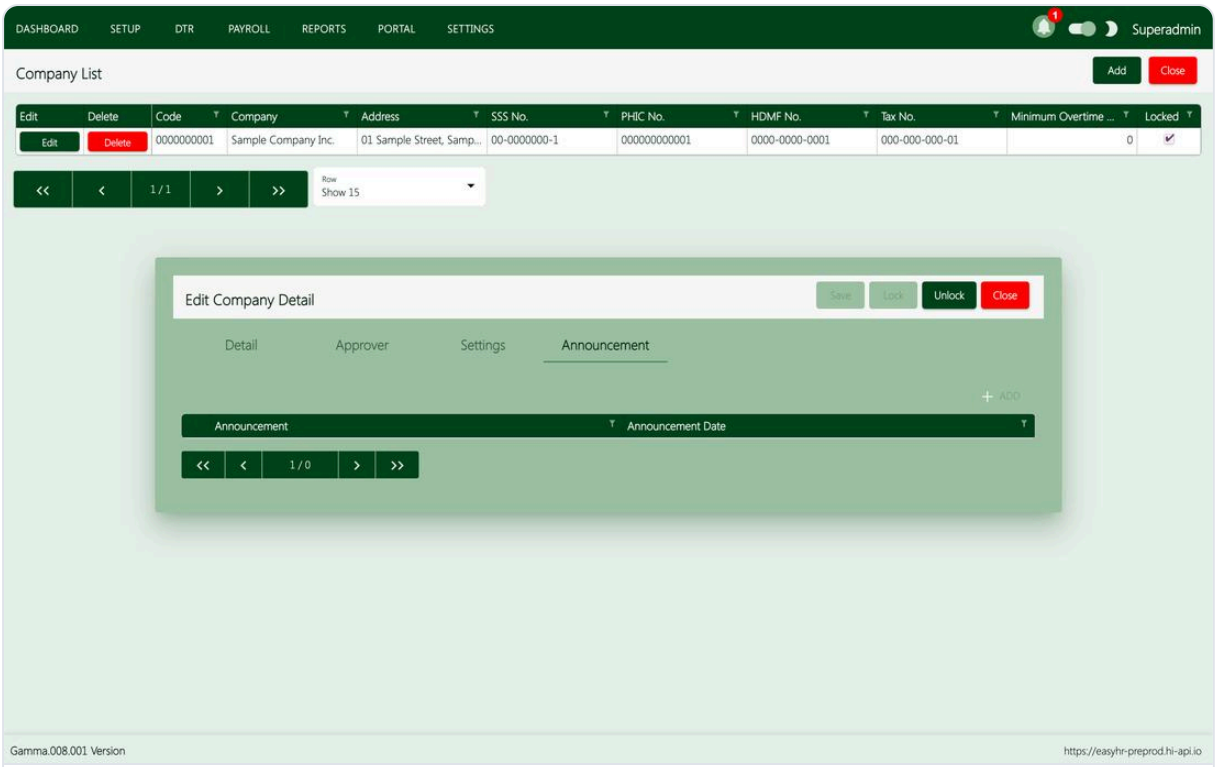
### SETTINGS




Company — Settings tab: how each kind of pay is treated

**Columns:** Edit · Delete · Code · Company · Address · SSS No. · PHIC No. · HDMF No. · Tax No. · Minimum Overtime Hours · Locked

### ANNOUNCEMENT




Company — Announcement tab

**Columns:** Edit · Delete · Code · Company · Address · SSS No. · PHIC No. · HDMF No. · Tax No. · Minimum Overtime Hours · Locked

### WHAT YOU SHOULD SEE

The company appears in the list with its code, and becomes selectable on the employee, payroll and report screens.

### WORTH KNOWING

> **A company that is unlocked does not appear in the other modules.** If a company is missing from a drop-down, this is almost always why.

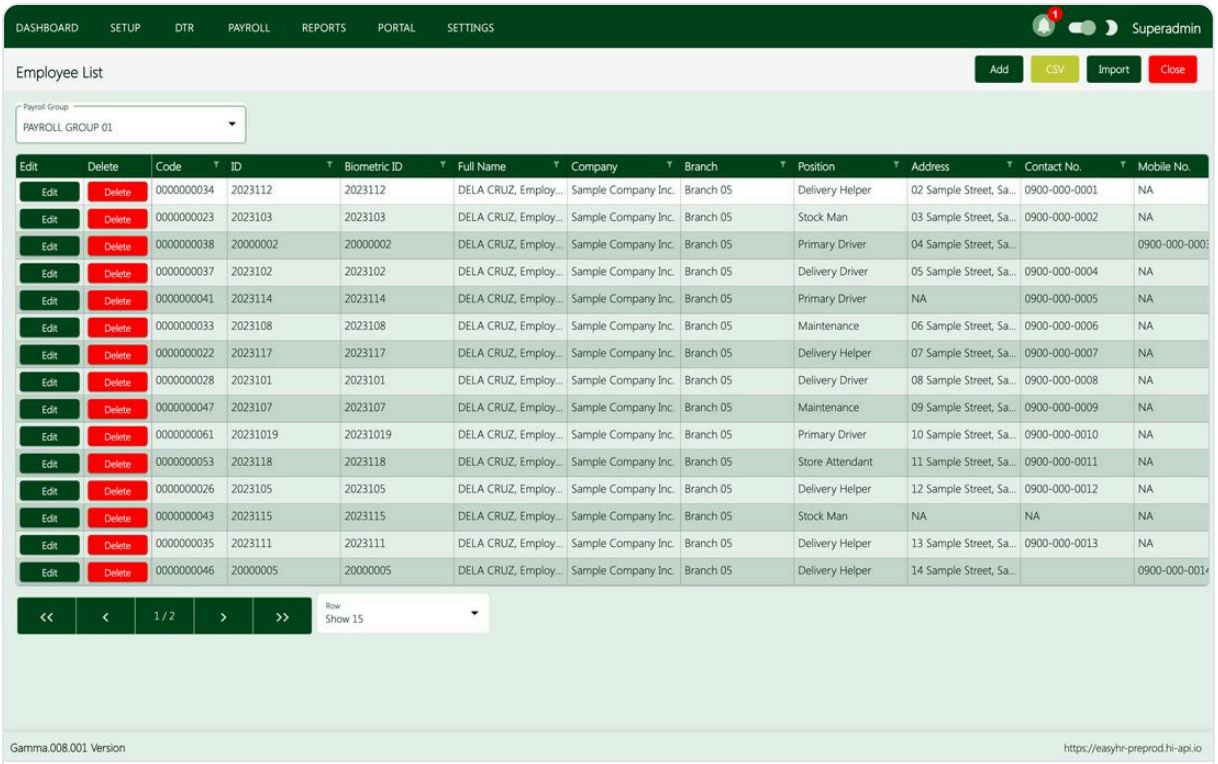
> A company that already has transactions behind it cannot be deleted.

## 2.2 Employee

The employee record — the 201 file — is the centre of the system. It carries everything payroll needs: who the person is, which company, branch and payroll group they belong to, how they are paid, which shift they follow, their government numbers and bank details, and the whole of their HR history.

### HOW TO GET THERE

**SETUP → Employee** `/software/employee-list`




Employee — the screen as it opens

### WHAT TO DO

1. Open **SETUP** → **Employee**.
2. Choose the **Payroll Group** above the grid; the list shows the employees in that group only.
3. Click **Edit** on a row to open the record, or **Add** to create one.
4. Work through the tabs — **General** for personal details, **Payroll** for rates and government numbers, **HR** for employment dates and status, **Shift** for the working pattern, and the remaining tabs for other income, memos, family, education, training and previous employers.
5. Click **Save**, then **Lock**.

### COLUMNS ON THIS SCREEN

Edit · Delete · Code · ID · Biometric ID · Full Name · Company · Branch · Position · Address · Contact No. · Mobile No.

### FILTERS

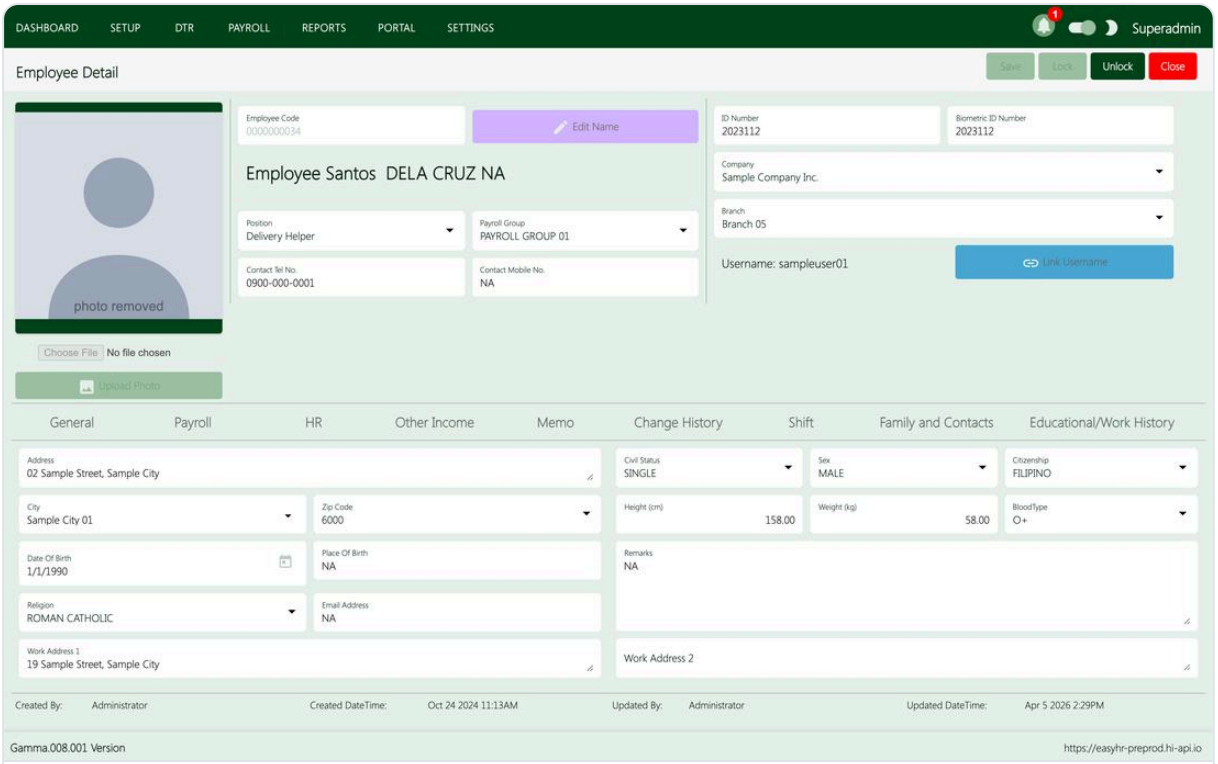
Payroll Group

### BUTTONS

Add · CSV · Import · Close · Edit · Delete

### THE RECORD ITSELF

Click **Edit** on a row (or **Add** for a new record) to open the detail screen at `/software/employee-detail/<id>`.



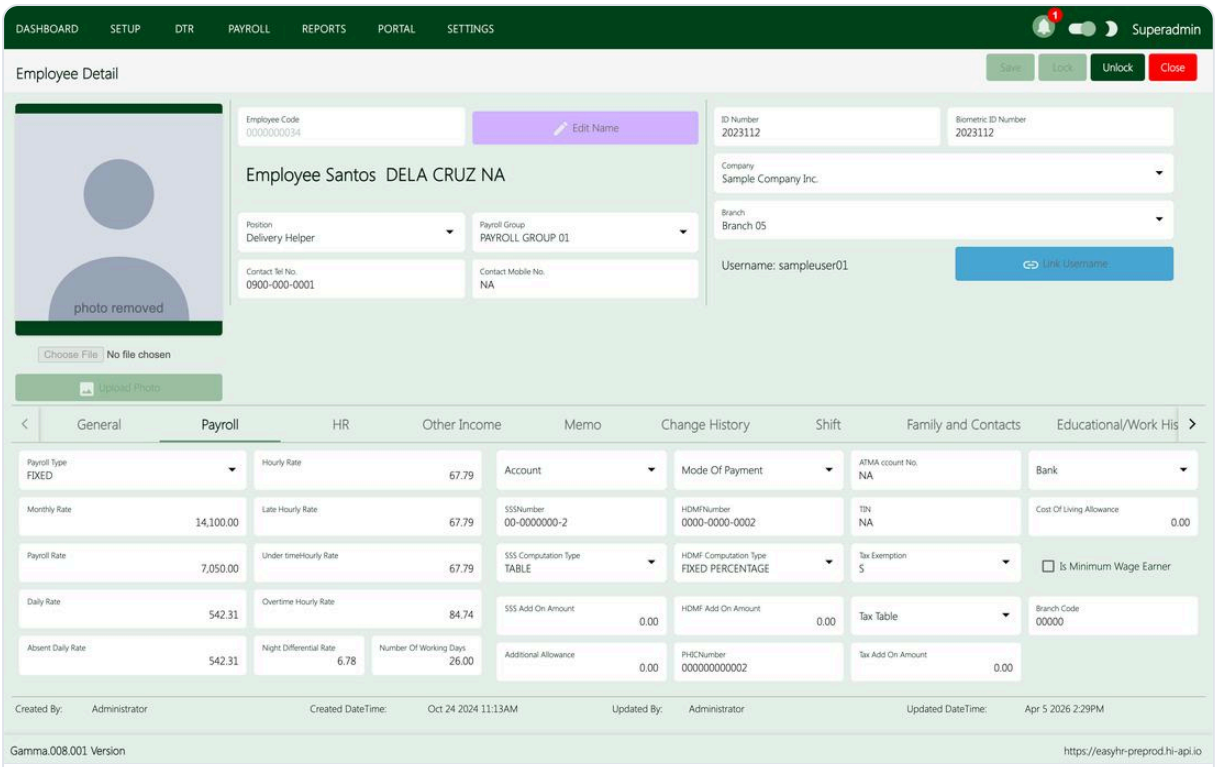

Employee — the record

**Tabs:** General · Payroll · HR · Other Income · Memo · Change History · Shift · Family and Contacts · Educational/Work History · Training/Seminar · Previous Employer

**Fields:** Employee Code · Position · Payroll Group · Contact Tel No. · Contact Mobile No. · ID Number · Biometric ID Number · Company · Branch · Address · City · Zip Code · Date Of Birth · Place Of Birth · Religion · Email Address · Work Address 1 · Civil Status · Sex · Citizenship · Height (cm) · Weight (kg) · BloodType · Remarks · Work Address 2

**Buttons:** Save · Lock · Unlock · Close · insert_photo Upload Photo · edit Edit Name · link Link Username

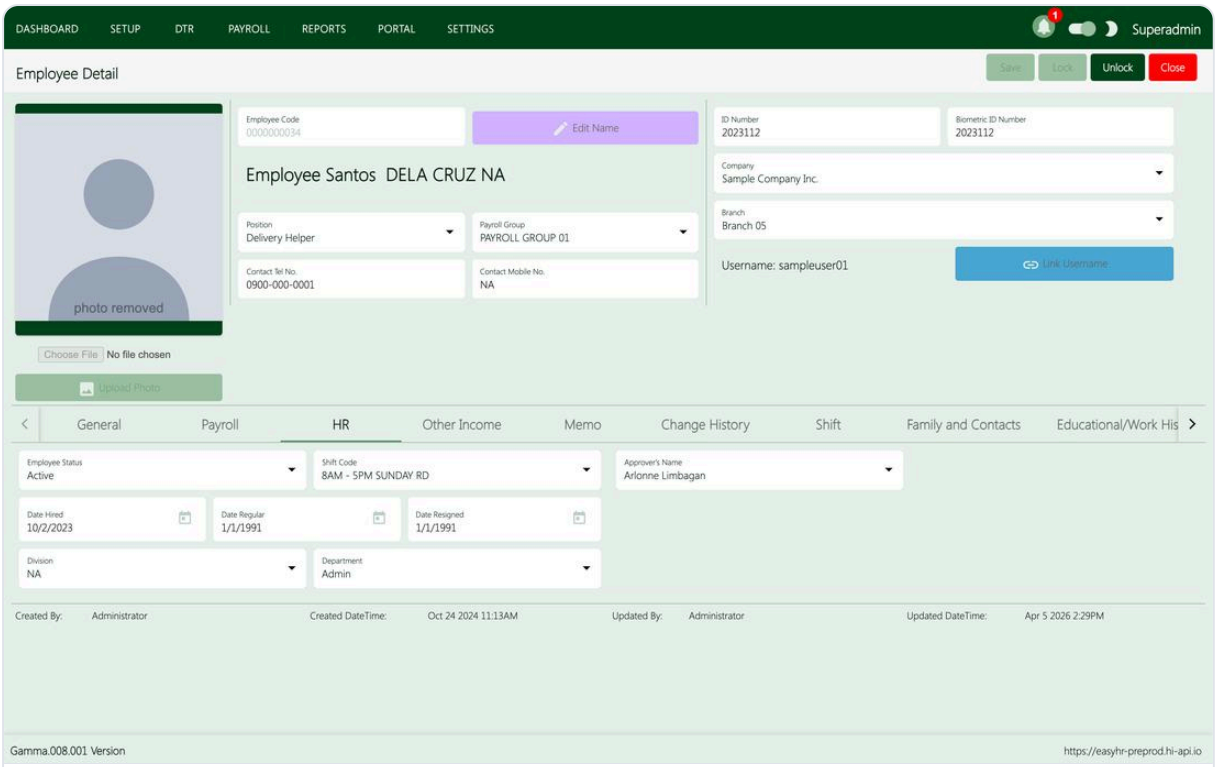
## PAYROLL




Employee — Payroll tab: rates and government numbers

**Fields:** Employee Code · Position · Payroll Group · Contact Tel No. · Contact Mobile No. · ID Number · Biometric ID Number · Company · Branch · Payroll Type · Hourly Rate · Monthly Rate · Late Hourly Rate · Payroll Rate · Under timeHourly Rate · Daily Rate · Overtime Hourly Rate · Absent Daily Rate · Night Differential Rate · Number Of Working Days · Account · Mode Of Payment · ATMA ccount No. · Bank · SSSNumber · HDMFNumber · TIN · Cost Of Living Allowance · SSS Computation Type · HDMF Computation Type · Tax Exemption · SSS Add On Amount · HDMF Add On Amount · Tax Table · Branch Code · Additional Allowance · PHICNumber · Tax Add On Amount

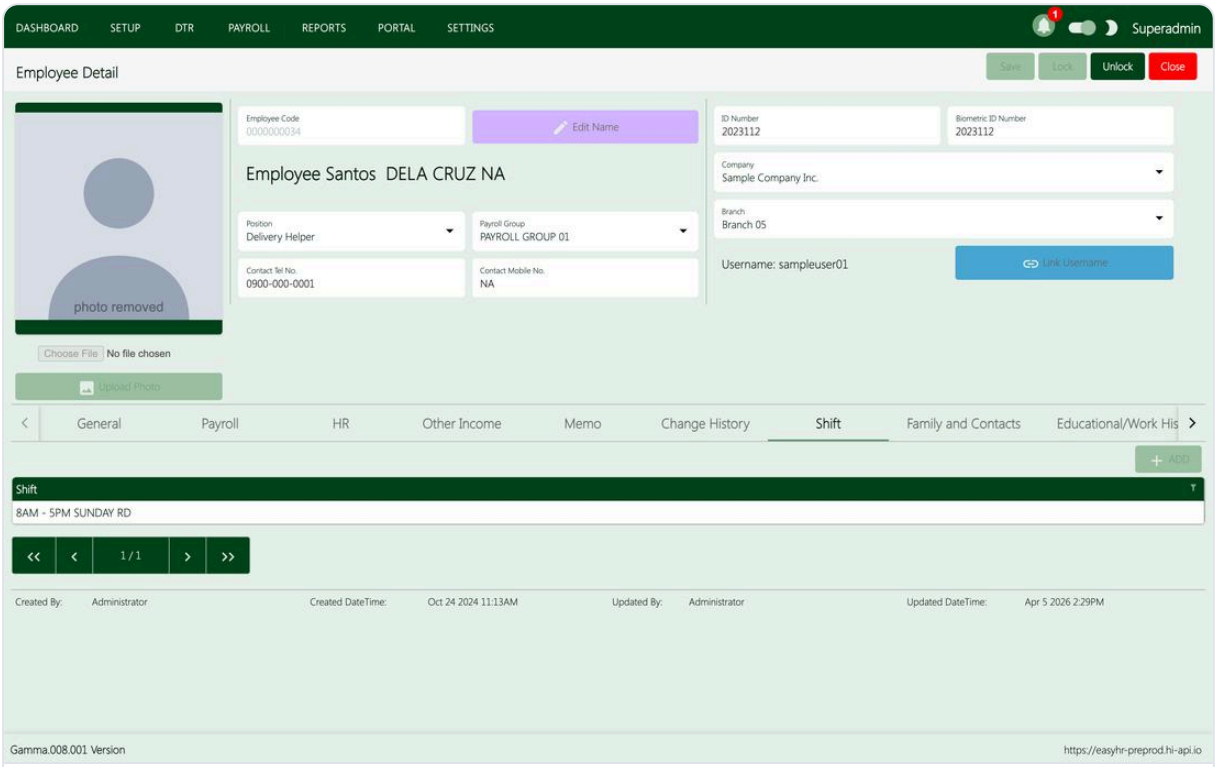
### HR




Employee — HR tab: employment dates and status

**Fields:** Employee Code · Position · Payroll Group · Contact Tel No. · Contact Mobile No. · ID Number · Biometric ID Number · Company · Branch · Employee Status · Shift Code · Date Hired · Date Regular · Date Resigned · Division · Department · Approver's Name

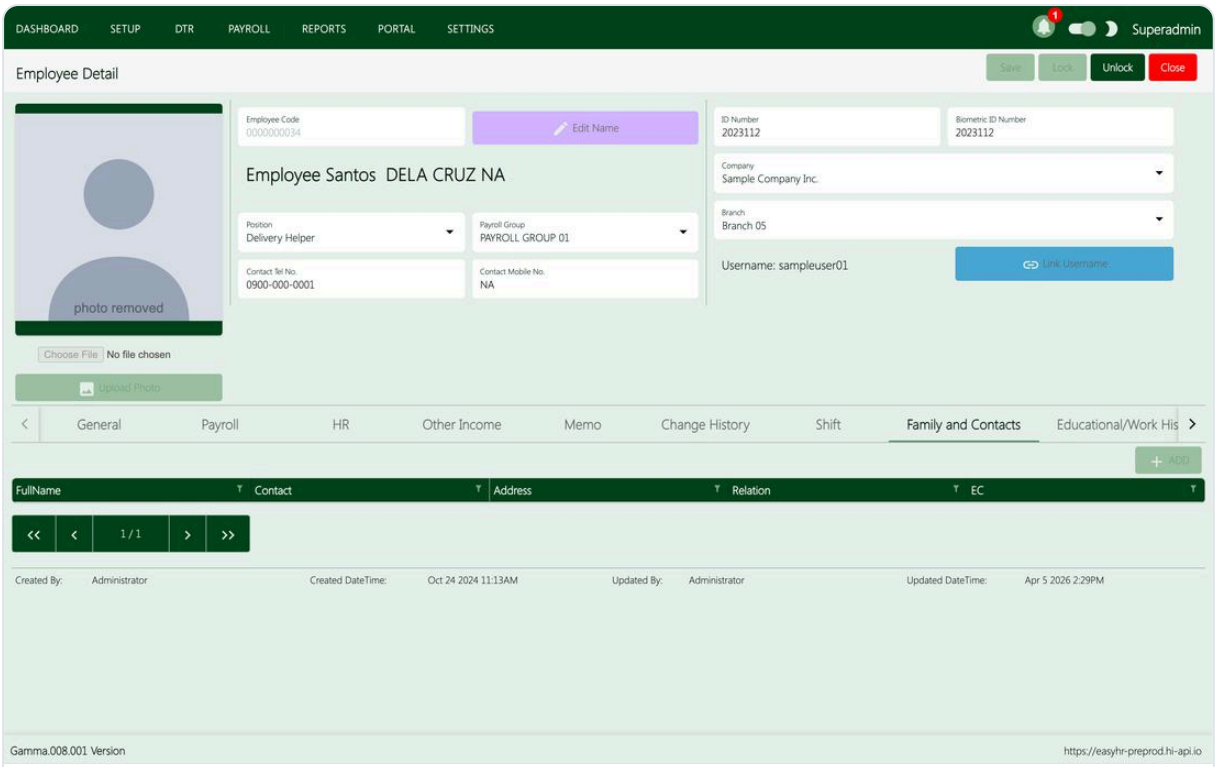
### SHIFT




Employee — Shift tab

**Columns:** Shift

#### FAMILY AND CONTACTS




Employee — Family and Contacts tab

**Columns:** FullName · Contact · Address · Relation · EC

#### WHAT YOU SHOULD SEE

The employee appears in the list for the chosen payroll group and can be included in a DTR and a payroll.

#### WORTH KNOWING

**Import** loads employees from a spreadsheet, which is much faster than typing them one by one when a company goes live. The file must follow the template exactly; a wrong column order is rejected with an error message.

**CSV** exports the list you are looking at.

Use **Link Username** on the employee record to connect the employee to the portal account they sign in with. Without it the employee cannot see their own payslip.

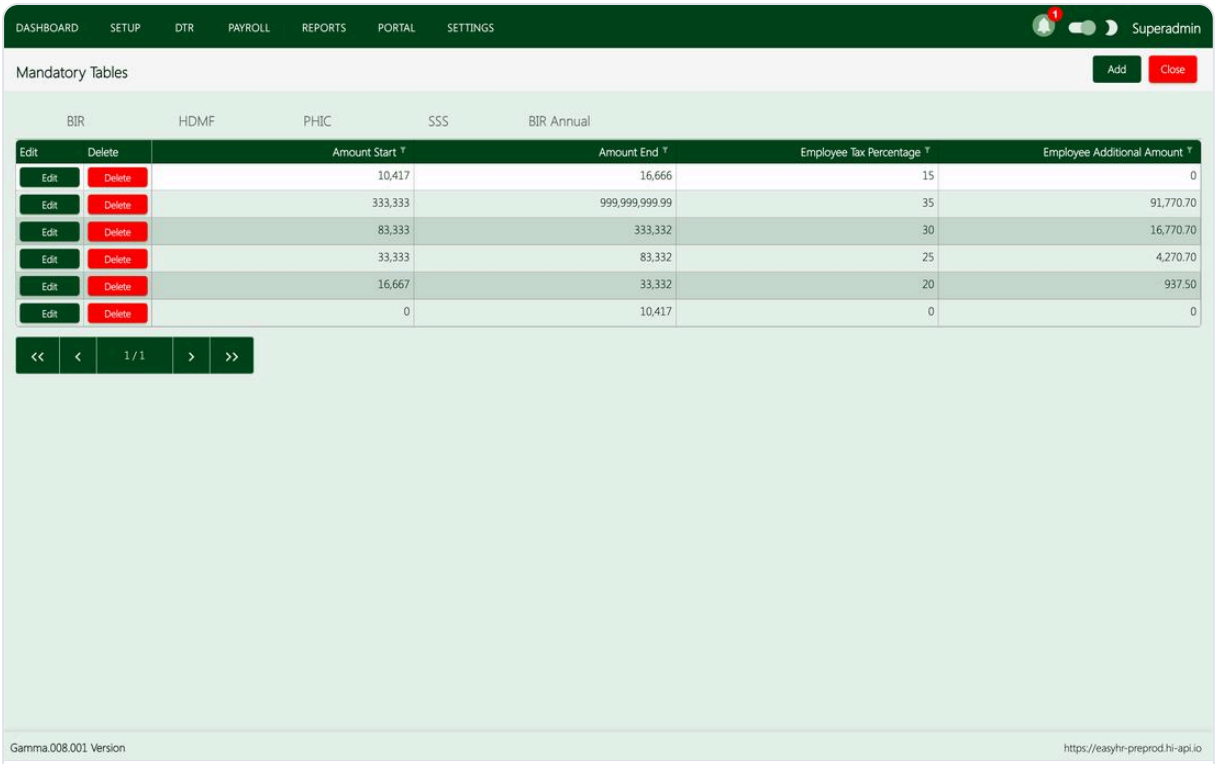
Deleting an employee who already appears in a DTR or a payroll is not possible; unlock the record and mark them inactive instead.

## 2.3 Mandatory Tables

The contribution tables the government publishes: BIR withholding tax, SSS, PhilHealth and HDMF (Pag-IBIG). easyHR reads these tables every time it computes a payroll, so what is entered here decides what is deducted from everybody's pay.

#### HOW TO GET THERE

**SETUP → Mandatory Tables** `/software/mandatory-tables`




Mandatory Tables — the screen as it opens

### WHAT TO DO

1. Open **SETUP** → **Mandatory Tables**.
2. Choose the table you need — **BIR**, **BIR Annual**, **HDMF**, **PHIC** or **SSS**.
3. Click **Edit** on the bracket that has changed and correct the range or the amount, or use **Add** when the government publishes a new bracket.
4. Click **Save**.

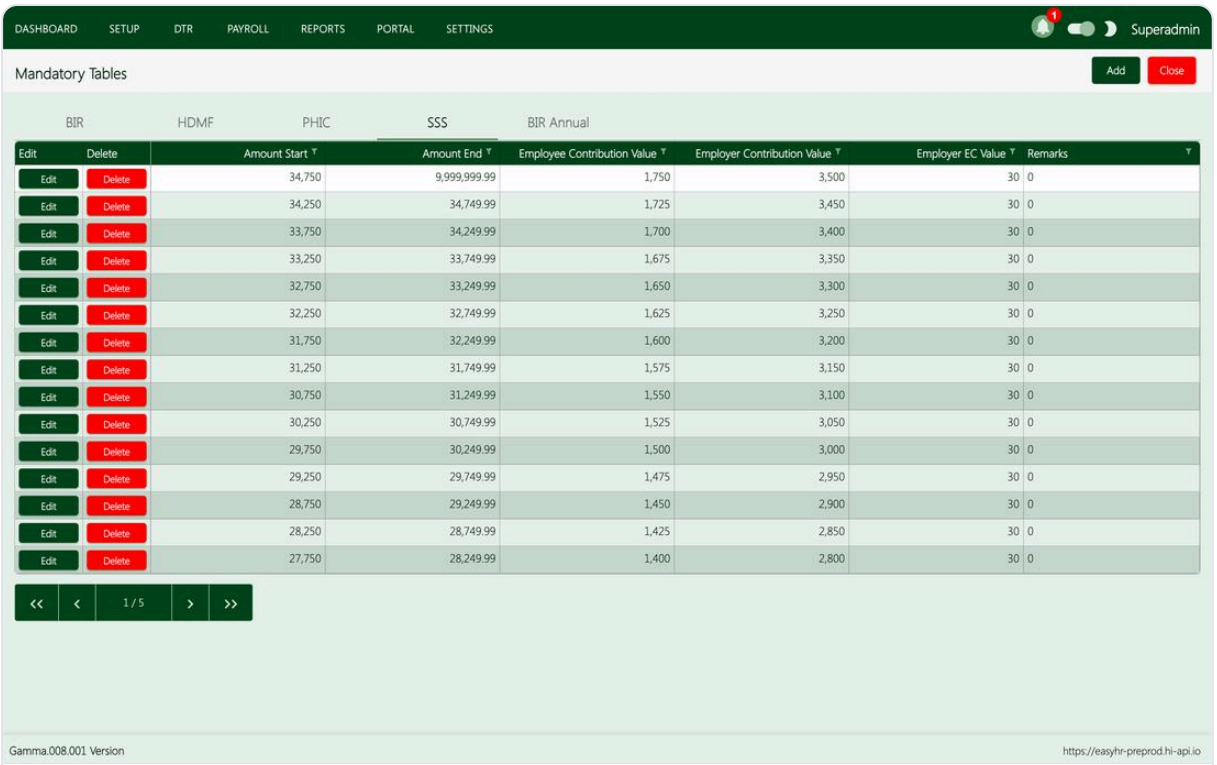
### COLUMNS ON THIS SCREEN

Edit | Delete | Amount Start | Amount End | Employee Tax Percentage | Employee Additional Amount

### BUTTONS

Add | Close | Edit | Delete

### SSS

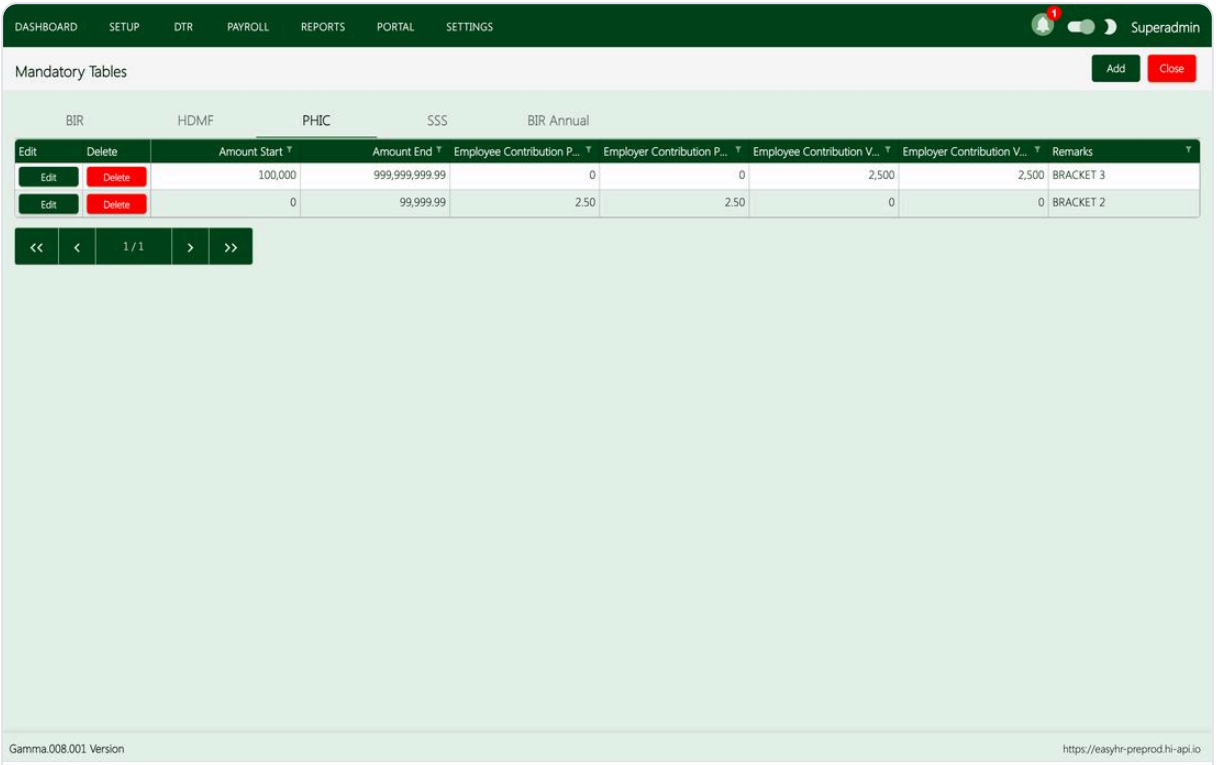



| Edit | Delete | Amount Start | Amount End | Employee Contribution Value | Employer Contribution Value | Employer EC Value | Remarks |
|---|---|---|---|---|---|---|---|
| Edit | Delete | 34,750 | 9,999,999.99 | 1,750 | 3,500 | 30 | 0 |
| Edit | Delete | 34,250 | 34,749.99 | 1,725 | 3,450 | 30 | 0 |
| Edit | Delete | 33,750 | 34,249.99 | 1,700 | 3,400 | 30 | 0 |
| Edit | Delete | 33,250 | 33,749.99 | 1,675 | 3,350 | 30 | 0 |
| Edit | Delete | 32,750 | 33,249.99 | 1,650 | 3,300 | 30 | 0 |
| Edit | Delete | 32,250 | 32,749.99 | 1,625 | 3,250 | 30 | 0 |
| Edit | Delete | 31,750 | 32,249.99 | 1,600 | 3,200 | 30 | 0 |
| Edit | Delete | 31,250 | 31,749.99 | 1,575 | 3,150 | 30 | 0 |
| Edit | Delete | 30,750 | 31,249.99 | 1,550 | 3,100 | 30 | 0 |
| Edit | Delete | 30,250 | 30,749.99 | 1,525 | 3,050 | 30 | 0 |
| Edit | Delete | 29,750 | 30,249.99 | 1,500 | 3,000 | 30 | 0 |
| Edit | Delete | 29,250 | 29,749.99 | 1,475 | 2,950 | 30 | 0 |
| Edit | Delete | 28,750 | 29,249.99 | 1,450 | 2,900 | 30 | 0 |
| Edit | Delete | 28,250 | 28,749.99 | 1,425 | 2,850 | 30 | 0 |
| Edit | Delete | 27,750 | 28,249.99 | 1,400 | 2,800 | 30 | 0 |

Mandatory Tables — SSS contribution table

**Columns:** Edit · Delete · Amount Start · Amount End · Employee Contribution Value · Employer Contribution Value · Employer EC Value · Remarks

### PHIC

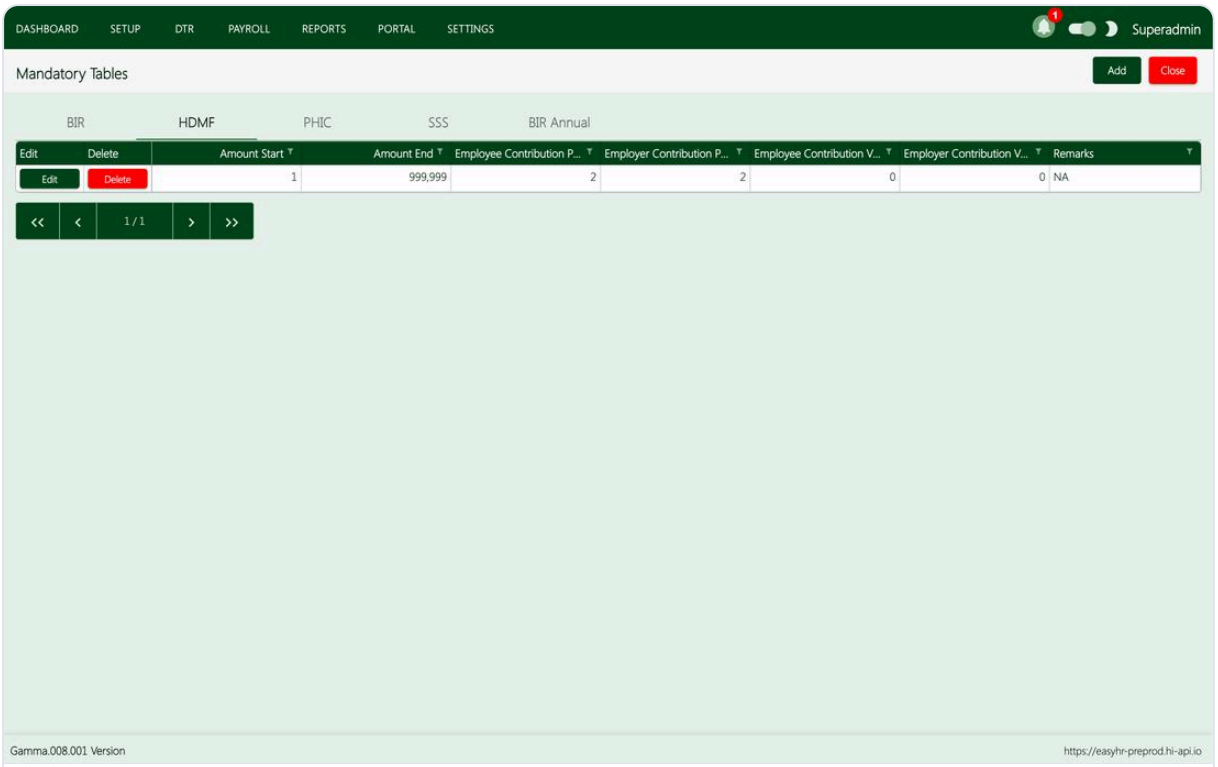



| Edit | Delete | Amount Start | Amount End | Employee Contribution P... | Employer Contribution P... | Employee Contribution V... | Employer Contribution V... | Remarks |
|---|---|---|---|---|---|---|---|---|
| Edit | Delete | 100,000 | 999,999,999.99 | 0 | 0 | 2,500 | 2,500 | BRACKET 3 |
| Edit | Delete | 0 | 99,999.99 | 2.50 | 2.50 | 0 | 0 | BRACKET 2 |

Mandatory Tables — PhilHealth table

**Columns:** Edit · Delete · Amount Start · Amount End · Employee Contribution Percentage · Employer Contribution Percentage · Employee Contribution Value · Employer Contribution Value · Remarks

### HDMF




Mandatory Tables — HDMF (Pag-IBIG) table

**Columns:** Edit · Delete · Amount Start · Amount End · Employee Contribution Percentage · Employer Contribution Percentage · Employee Contribution Value · Employer Contribution Value · Remarks

#### WHAT YOU SHOULD SEE

The corrected bracket takes effect on the next payroll that is computed.

#### WORTH KNOWING

> **Do not change these tables for any reason other than a change in the law.** They are shipped correct. Editing a bracket to fix one employee's deduction changes the deduction for everybody.

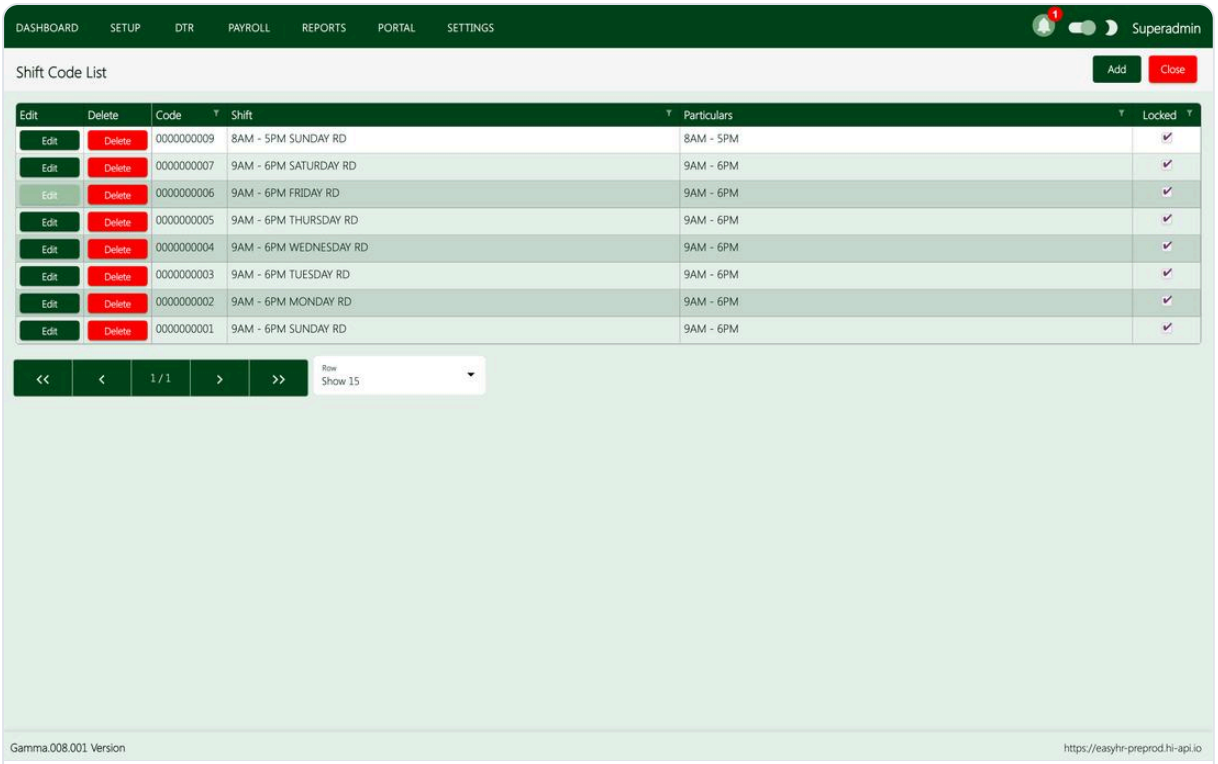
> Changing a table does not recompute payrolls that are already locked.

## 2.4 Shift

A shift code is a working pattern: when the day starts and ends, when the break falls, how many hours count as a normal day, and which days of the week are rest days. Every employee is given a shift code, and the DTR judges lateness, undertime and overtime against it.

#### HOW TO GET THERE

**SETUP → Shift** `/software/shift-code-list`




Shift — the screen as it opens

### WHAT TO DO

1. Open **SETUP** → **Shift**.
2. Click **Add**, or **Edit** an existing shift.
3. Give the shift a code and a name, then set the times on the shift lines — one line per day of the week.
4. Click **Save**, then **Lock**.

### COLUMNS ON THIS SCREEN

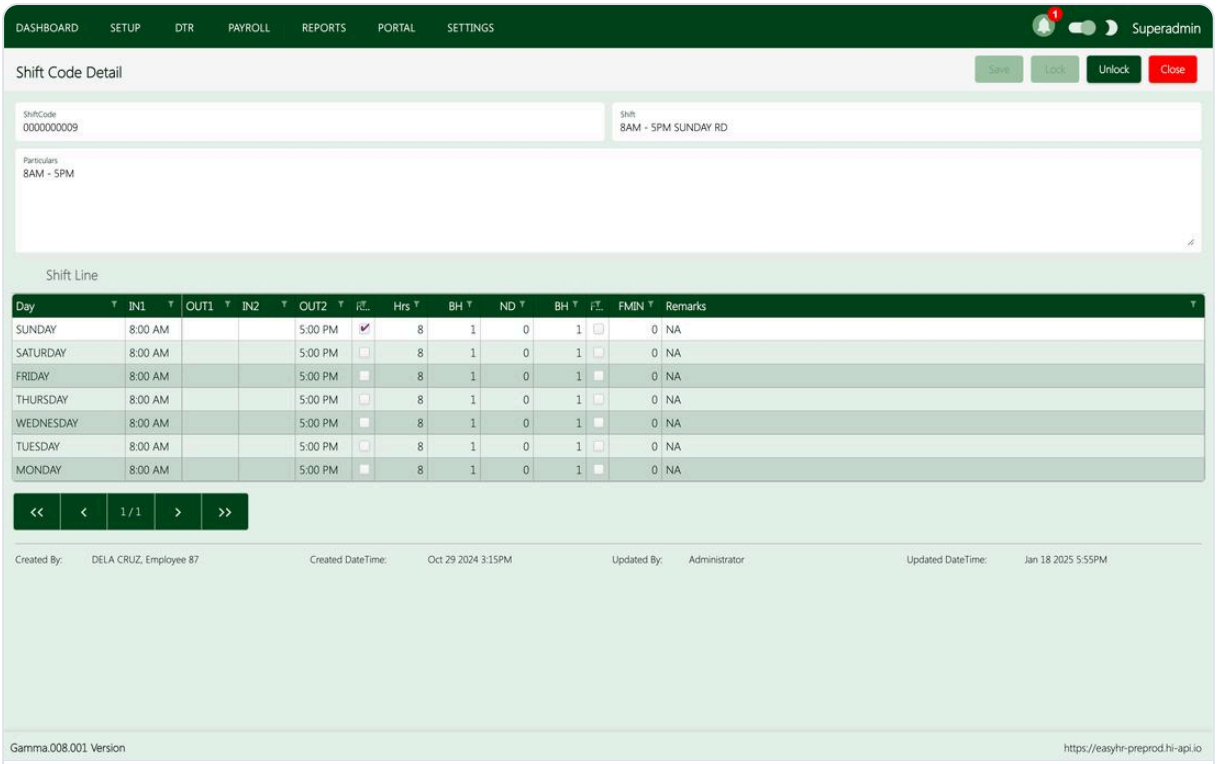
Edit · Delete · Code · Shift · Particulars · Locked

### BUTTONS

Add · Close · Edit · Delete

### THE RECORD ITSELF

Click **Edit** on a row (or **Add** for a new record) to open the detail screen at `/software/shift-code-detail/<id>`.



Shift — the record

**Tabs:** Shift Line

**Fields:** ShiftCode · Shift · Particulars

**Buttons:** Save · Lock · Unlock · Close

#### SHIFT LINE

> This tab is the one already open in the figure above; its columns are listed below.

**Columns:** Day · IN1 · OUT1 · IN2 · OUT2 · RD · Hrs · BH · ND · FLEX · FMIN · Remarks

#### WHAT YOU SHOULD SEE

The shift becomes selectable on the employee record and on Change Shift.

#### WORTH KNOWING

> Set up one shift per genuine working pattern rather than one per employee. Employees who work the same hours should share a shift code.

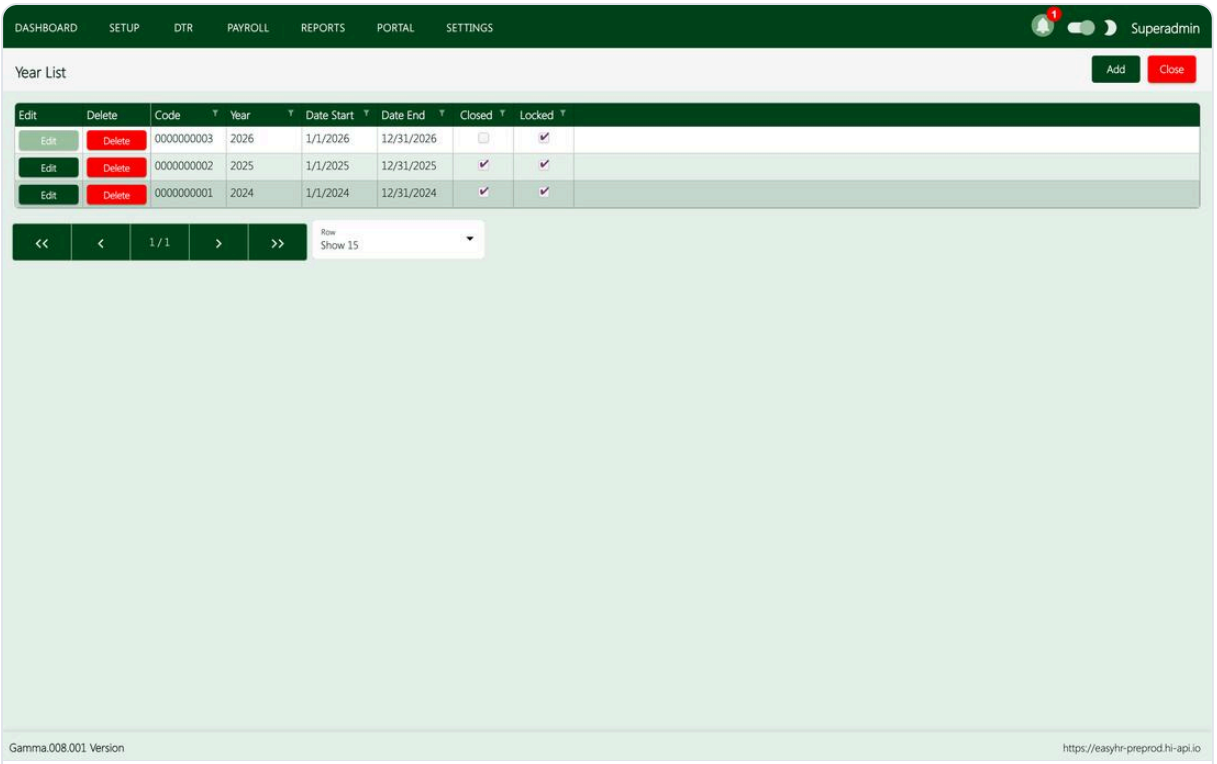
> Changing a shift affects every employee assigned to it, including days that have not yet been processed into a DTR.

## 2.5 Year

The payroll year. Each year record holds the holiday calendar — which dates are regular holidays and which are special — and the leave credits granted to each employee for that year. Holiday pay and leave balances both come from here.

#### HOW TO GET THERE

**SETUP → Year** `/software/year-list`




Year — the screen as it opens

### WHAT TO DO

1. Open **SETUP** → **Year**.
2. Click **Add** for a new year, or **Edit** the current one.
3. On the year's date list enter every holiday and mark it regular or special.
4. On the leave credits list enter the credits each employee starts the year with.
5. Click **Save**, then **Lock**.

### COLUMNS ON THIS SCREEN

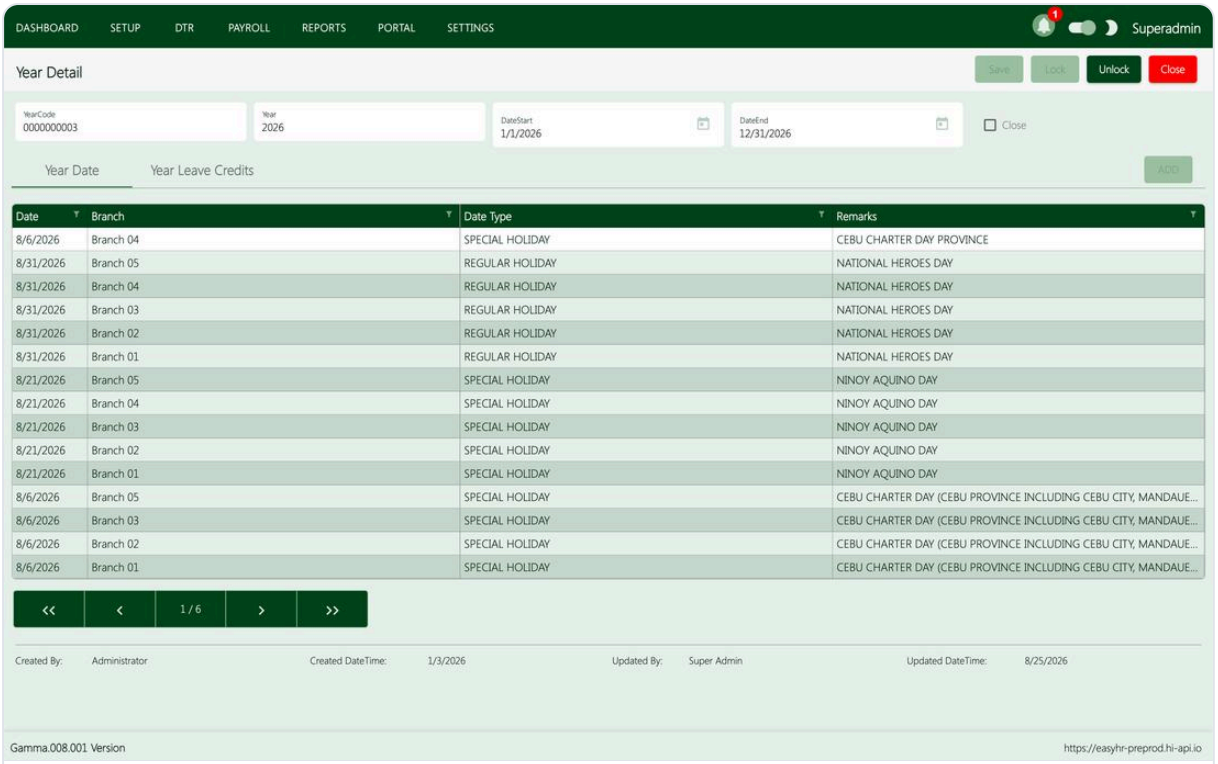
Edit · Delete · Code · Year · Date Start · Date End · Closed · Locked

### BUTTONS

Add · Close · Edit · Delete

### THE RECORD ITSELF

Click **Edit** on a row (or **Add** for a new record) to open the detail screen at `/software/year-detail/<id>`.




Year — the record

**Tabs:** Year Date · Year Leave Credits · ADD

**Fields:** YearCode · Year · DateStart · DateEnd

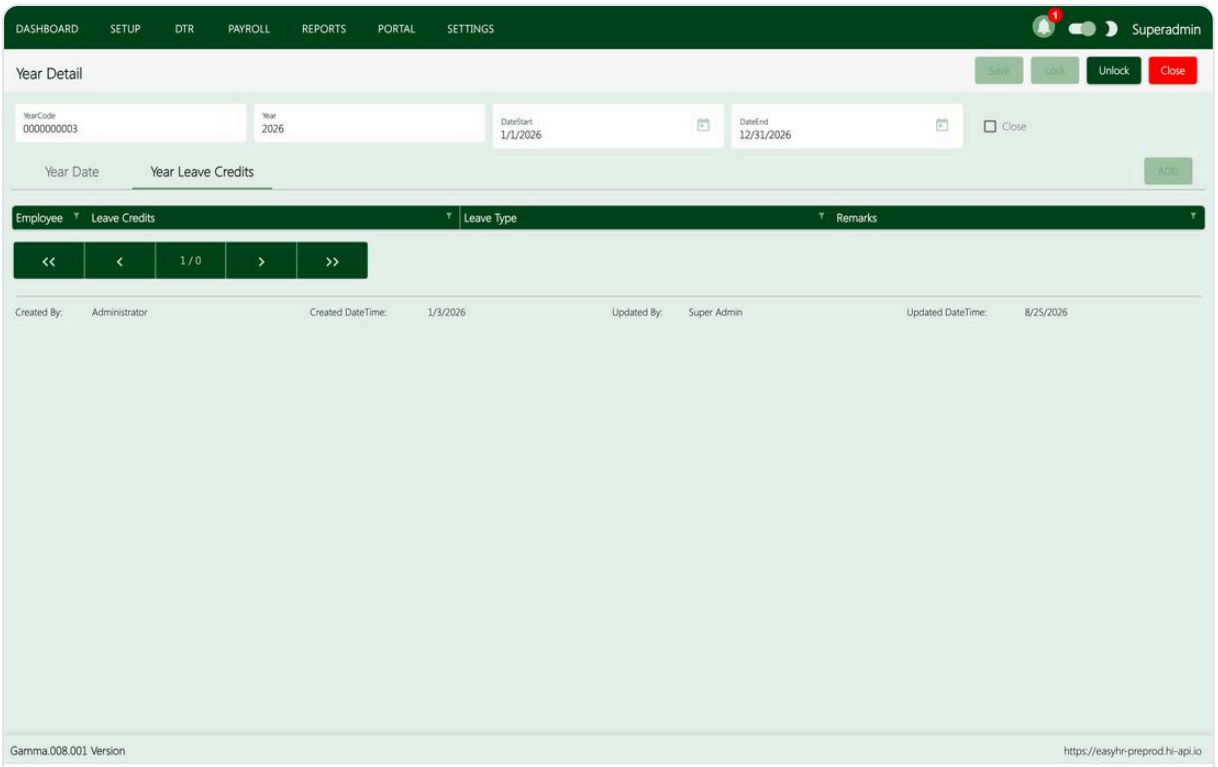
**Buttons:** Save · Lock · Unlock · Close · ADD

### YEAR DATE

> This tab is the one already open in the figure above; its columns are listed below.

**Columns:** Date · Branch · Date Type · Remarks

### YEAR LEAVE CREDITS




Year — leave credits per employee

**Columns:** Employee · Leave Credits · Leave Type · Remarks

### WHAT YOU SHOULD SEE

Holiday pay is computed automatically for the dates entered, and leave applications draw against the credits recorded here.

### WORTH KNOWING

> **Keep the current year locked.** An unlocked year is not picked up when a payroll is computed.

> A holiday added after a payroll has been locked does not change that payroll.

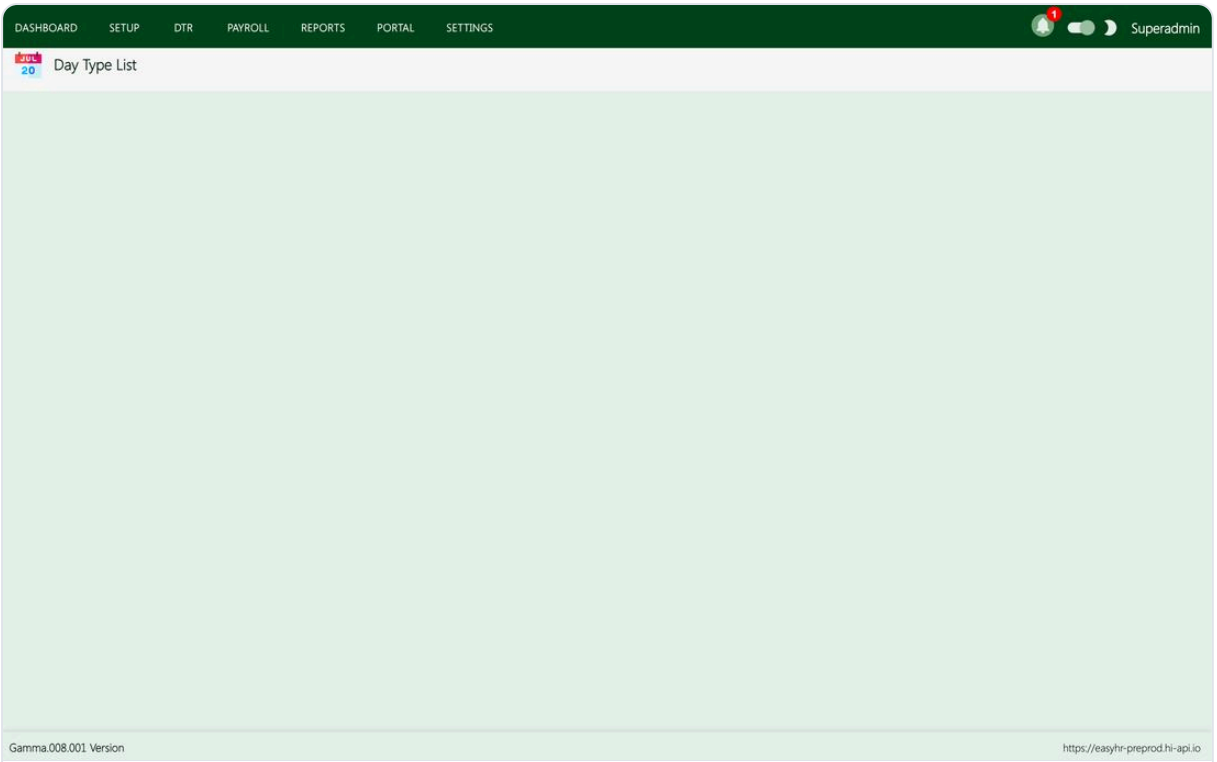
## 2.6 Day Type

The list of day types — the labels the DTR uses to classify each day, such as a regular day, a rest day or a holiday.

### HOW TO GET THERE

**SETUP → Day Type** `/software/day-type-list`

> The menu entry for this screen is not shown in the demonstration environment. Whether it appears for you depends on your company's configuration and on your user rights.




Day Type — the screen as it opens

#### WHAT TO DO

1. Open **SETUP** → **Day Type**, where the menu shows it.

#### THE RECORD ITSELF

> This module has a record screen, opened with the **Edit** button on a row. The demonstration environment holds no records for it, so it is not illustrated here.

#### WHAT YOU SHOULD SEE

The day types available to the DTR.

#### WORTH KNOWING

> **In the system this manual was written from the screen opens but shows nothing at all** — no grid, no fields and no buttons of its own. No request fails and no error is reported; the body of the screen is simply empty. It is listed here for completeness and has been reported for investigation.

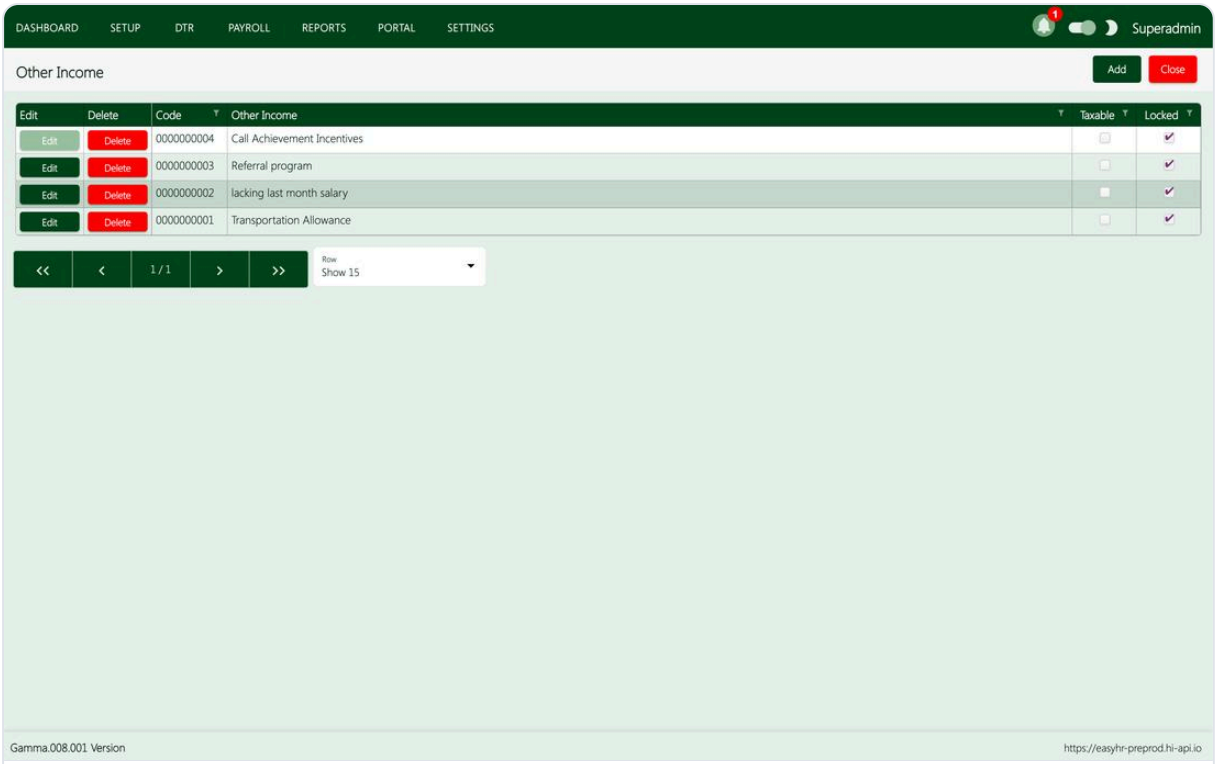
> The menu entry is not shown in this environment either.

## 2.7 Other Income

The catalogue of extra income types — allowances, bonuses, incentives — that can later be added to a pay run. Setting a type up here decides whether it is taxable and whether it counts towards the 13th month; it does not by itself pay anybody anything.

#### HOW TO GET THERE

**SETUP → Other Income** `/software/other-income`



Other Income — the screen as it opens

#### WHAT TO DO

1. Open **SETUP** → **Other Income**.
2. Click **Add**, or **Edit** an existing type.
3. Name the income type and set whether it is taxable and whether it is included in the 13th month computation.
4. Click **Save**, then **Lock**.

#### COLUMNS ON THIS SCREEN

Edit · Delete · Code · Other Income · Taxable · Locked

#### BUTTONS

Add · Close · Edit · Delete

#### WHAT YOU SHOULD SEE

The income type becomes selectable in **PAYROLL** → **Other Income**.

#### WORTH KNOWING

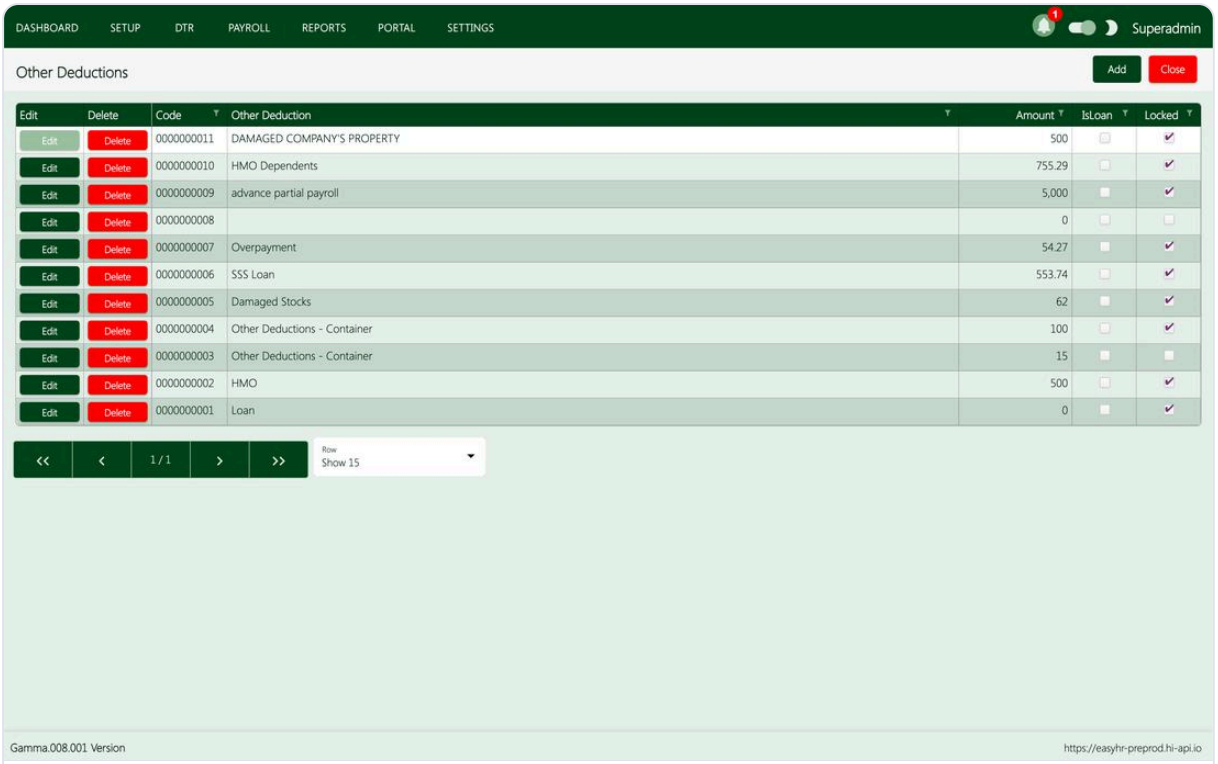
> This is a catalogue, not a transaction. Amounts are entered per employee, per pay period, under PAYROLL → Other Income.

## 2.8 Other Deductions

The catalogue of deduction types — company loans, cash advances, uniform deductions and the like. As with other income, this screen defines the type; the amounts are entered per employee when a pay run is prepared.

#### HOW TO GET THERE

**SETUP** → **Other Deductions** `/software/other-deductions`



Other Deductions — the screen as it opens

#### WHAT TO DO

1. Open **SETUP** → **Other Deductions**.
2. Click **Add**, or **Edit** an existing type.
3. Name the deduction and set how it behaves.
4. Click **Save**, then **Lock**.

#### COLUMNS ON THIS SCREEN

Edit · Delete · Code · Other Deduction · Amount · IsLoan · Locked

#### BUTTONS

Add · Close · Edit · Delete

#### WHAT YOU SHOULD SEE

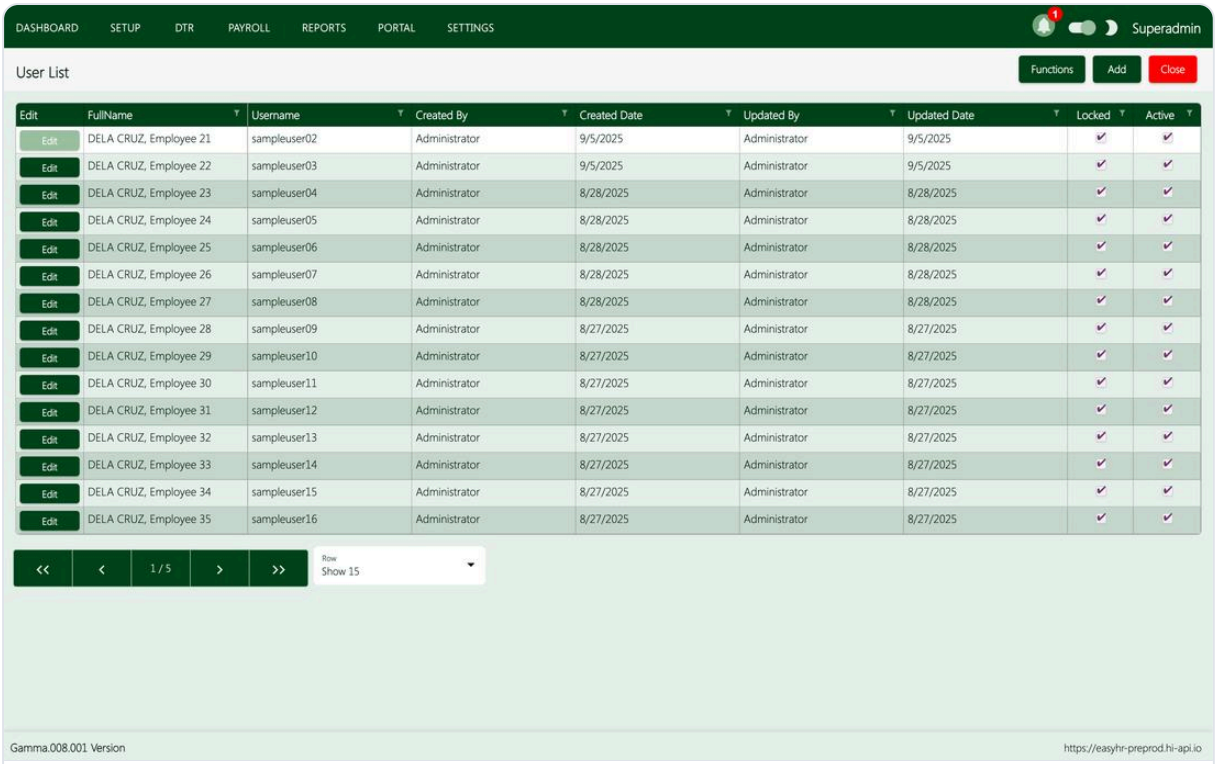
The deduction type becomes selectable in **PAYROLL** → **Other Deductions** and in the loan module.

## 2.9 Users

User accounts and what each of them is allowed to do. A user account is what a person signs in with; the employee record is what payroll pays. They are separate on purpose, and an employee who needs the portal must have both, tied together with **Link Username** on the employee record.

#### HOW TO GET THERE

**SETUP** → **Users** `/software/user-list`




Users — the screen as it opens

### WHAT TO DO

1. Open **SETUP** → **Users**.
2. Click **Add**, or **Edit** an existing account.
3. Enter the user name, the person's full name and the company they belong to.
4. Set the module rights — for each module, whether the user may open, add, edit, delete, lock, unlock and print.
5. Click **Save**.

### COLUMNS ON THIS SCREEN

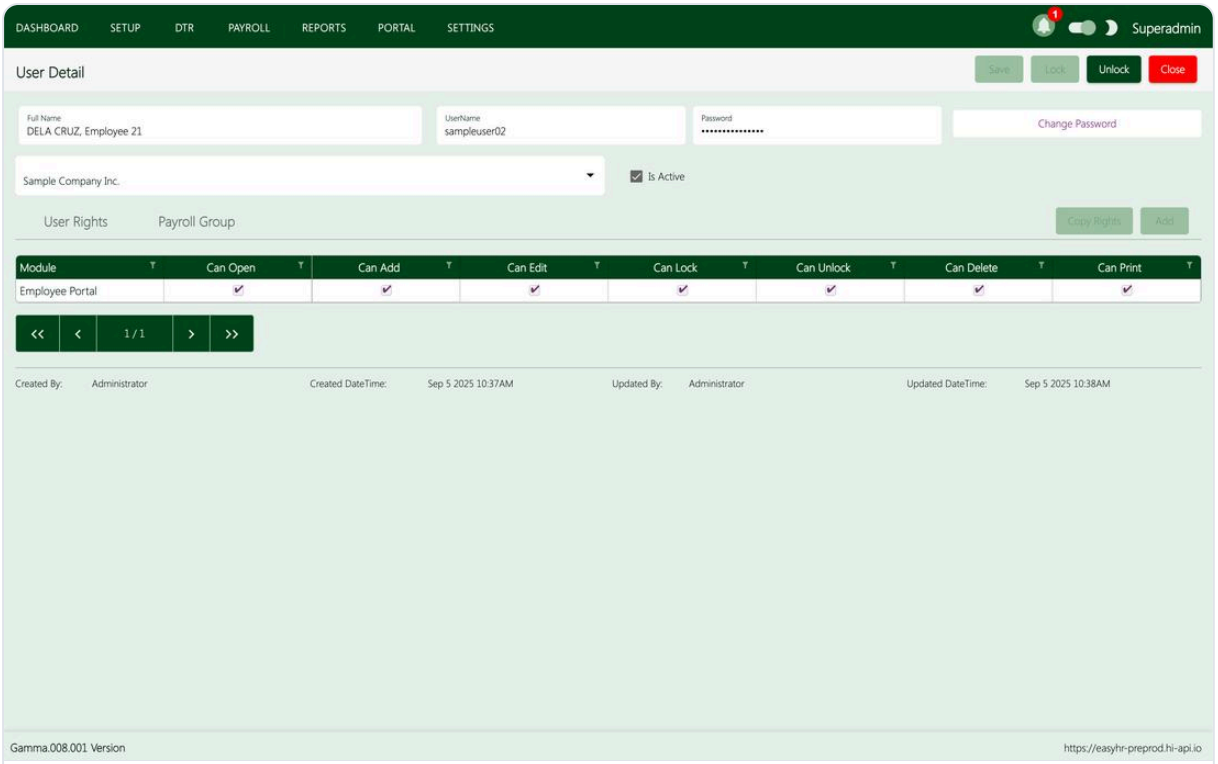
Edit · FullName · Username · Created By · Created Date · Updated By · Updated Date · Locked · Active

### BUTTONS

Functions · Add · Close · Edit

### THE RECORD ITSELF

Click **Edit** on a row (or **Add** for a new record) to open the detail screen at `/software/user-detail/<id>`.




Users — the record

**Tabs:** User Rights · Payroll Group · Copy Rights Add

**Fields:** Full Name · UserName · Password · Is Active

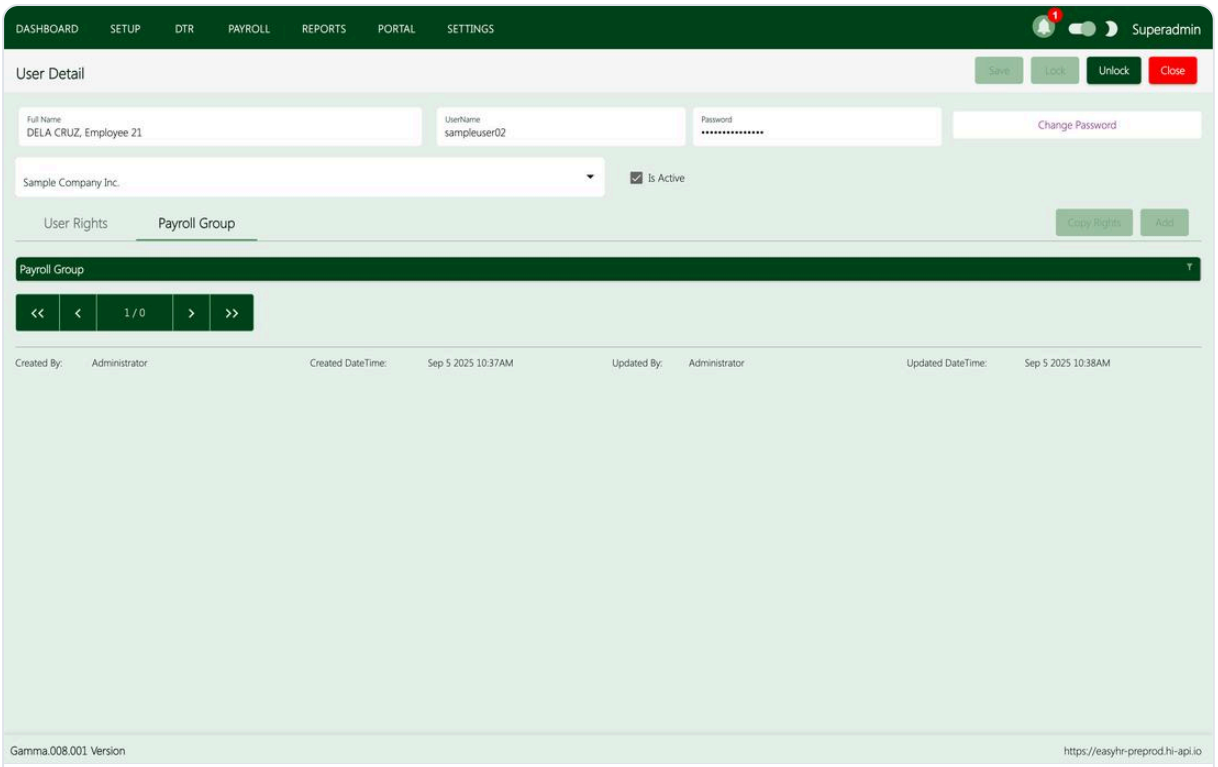
**Buttons:** Save · Lock · Unlock · Close · Change Password · Copy Rights · Add

### USER RIGHTS

> This tab is the one already open in the figure above; its columns are listed below.

**Columns:** Module · Can Open · Can Add · Can Edit · Can Lock · Can Unlock · Can Delete · Can Print

### PAYROLL GROUP




Users — the payroll groups an account may see

**Columns:** Payroll Group

### WHAT YOU SHOULD SEE

The account can sign in, and sees exactly the menus its rights allow.

### WORTH KNOWING

> Rights are per module. A user with no right to a module does not see it on the menu at all, which is why two people can be looking at different menus in the same system.

> Deactivate accounts of people who have left rather than deleting them, so that the records they created keep a valid author.

# 3. DTR (Daily Time Record)

Attendance. Applications filed by employees are reviewed and approved here, and the daily time record that payroll consumes is prepared here.

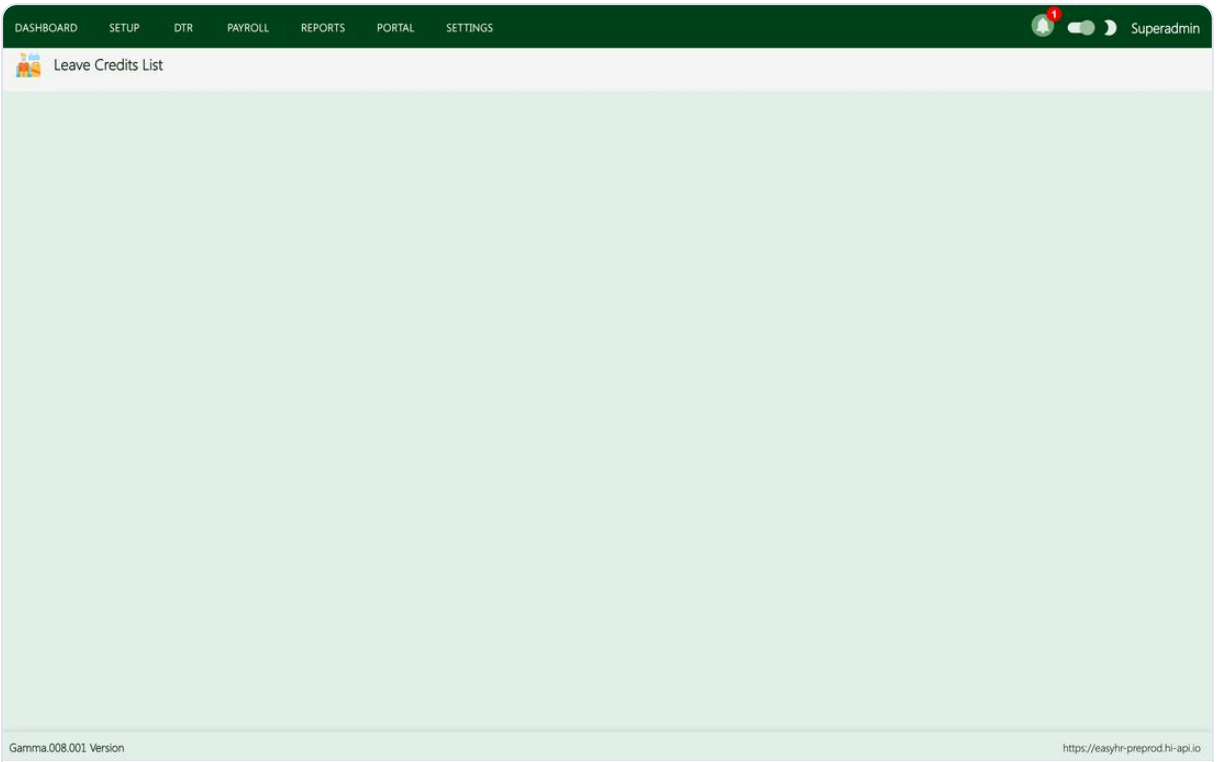
## 3.1 Leave Credits

The leave credits held by each employee — how many days they were granted and how many they have left. Leave applications draw against these balances.

### HOW TO GET THERE

**DTR → Leave Credits** `/software/leave-credits-list`

> The menu entry for this screen is not shown in the demonstration environment. Whether it appears for you depends on your company's configuration and on your user rights.




Leave Credits — the screen as it opens

### WHAT TO DO

1. Open **DTR → Leave Credits**, where the menu shows it.
2. Choose the payroll group, then **Edit** the employee whose balance you need to see.

### THE RECORD ITSELF

> This module has a record screen, opened with the **Edit** button on a row. The demonstration environment holds no records for it, so it is not illustrated here.

### WHAT YOU SHOULD SEE

The credit balance per leave type for the employee.

### WORTH KNOWING

> Opening credits for a year are set up under **SETUP → Year**.

**In the system this manual was written from the screen opens but shows nothing at all.** No request fails and no error is reported; the body of the screen is empty. It has been reported for investigation.

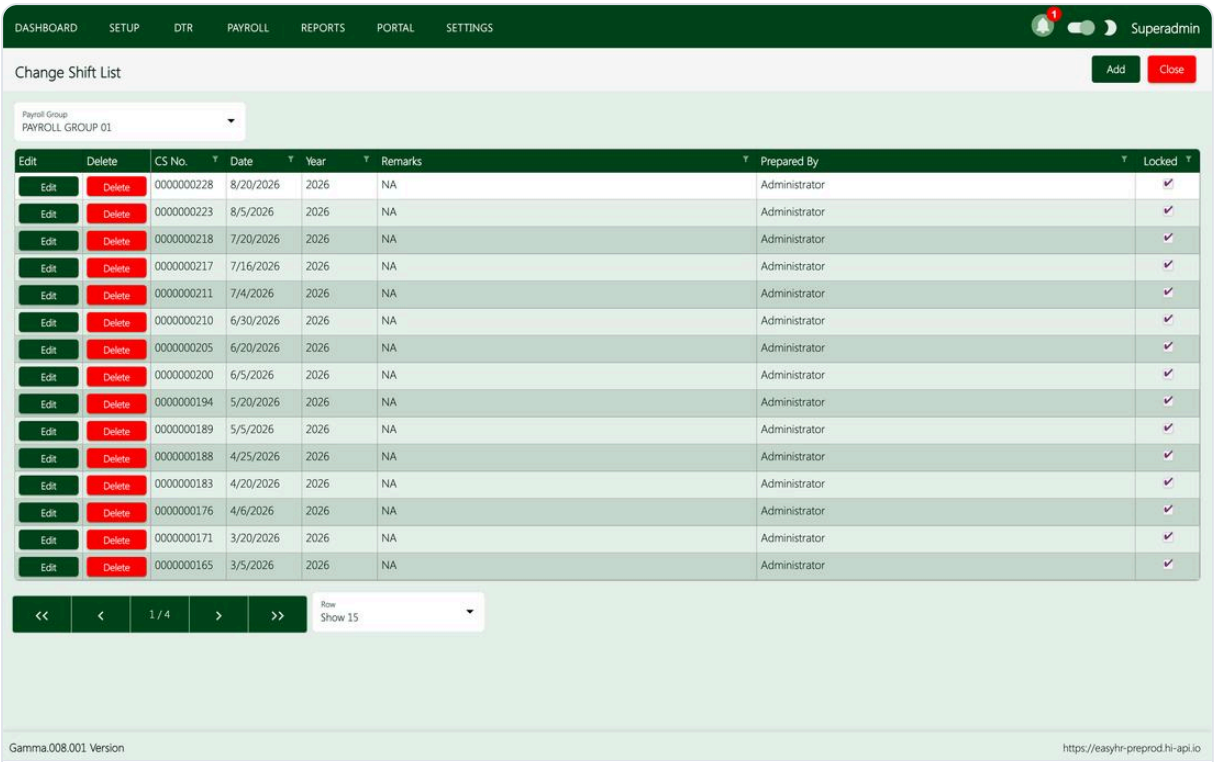
The menu entry is not shown in this environment either.

## 3.2 Change Shift

Change Shift records the cases where an employee worked a different pattern from their usual one. Employees file these from the portal; the approver reviews them here. A change shift document covers one cut-off period, and the DTR for that period reads it.

### HOW TO GET THERE

**DTR → Change Shift** `/software/change-shift-code-list`




Change Shift — the screen as it opens

### WHAT TO DO

1. Open **DTR → Change Shift**.
2. Click **Add** to open a new document, then set the payroll group and the start and end dates of the cut-off.
3. Add the lines — employee, date, and the shift actually worked — or use **Import** to load them from a spreadsheet.
4. Review the applications the employees filed themselves and approve them.
5. Click **Save**, then **Lock**.

### COLUMNS ON THIS SCREEN

Edit · Delete · CS No. · Date · Year · Remarks · Prepared By · Locked

### FILTERS

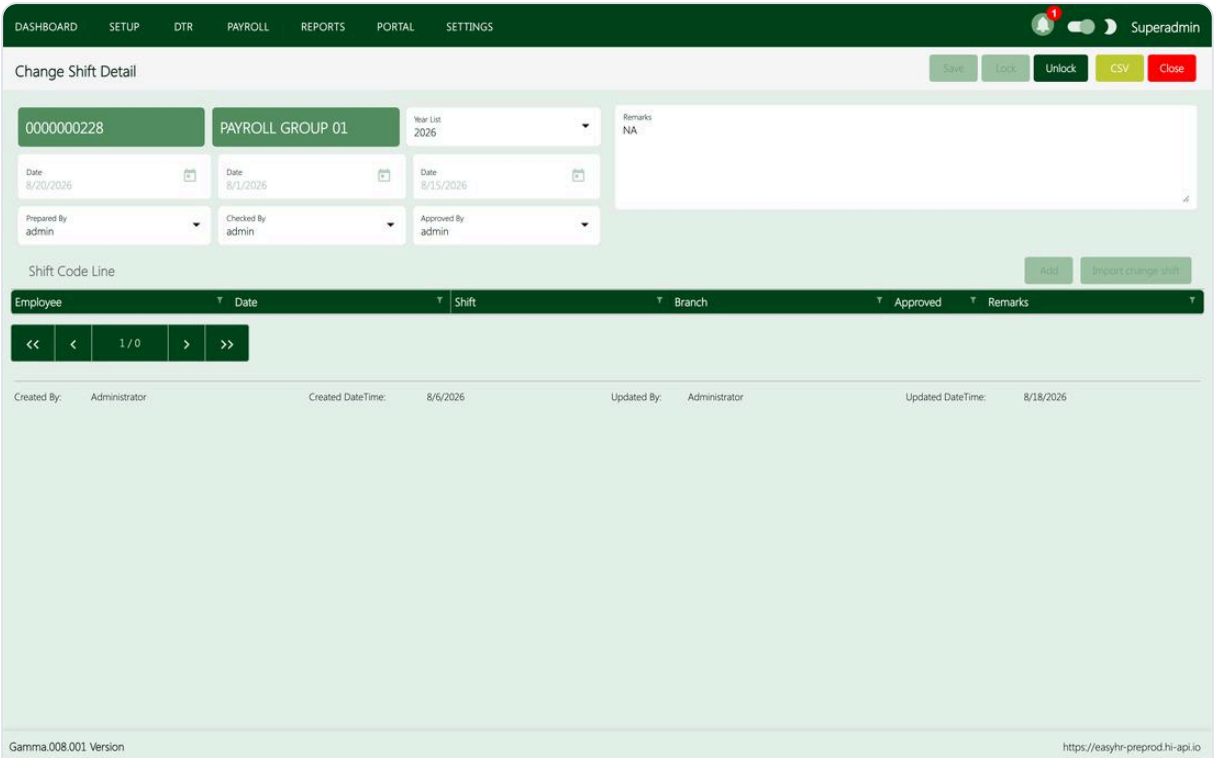
Payroll Group

#### BUTTONS

Add Close Edit Delete

#### THE RECORD ITSELF

Click **Edit** on a row (or **Add** for a new record) to open the detail screen at `/software/change-shift-code-detail/<id>`.




Change Shift — the record

**Tabs:** Shift Code Line

**Fields:** Year List Date

**Buttons:** Save Lock Unlock CSV Close Add Import change shift

#### SHIFT CODE LINE

> This tab is the one already open in the figure above; its columns are listed below.

**Columns:** Employee Date Shift Branch Approved Remarks

#### WHAT YOU SHOULD SEE

The approved shift changes are applied when the DTR for the same period is generated.

#### WORTH KNOWING

> Lock the change shift document **before** generating the DTR for that period, otherwise the changes are not taken up.

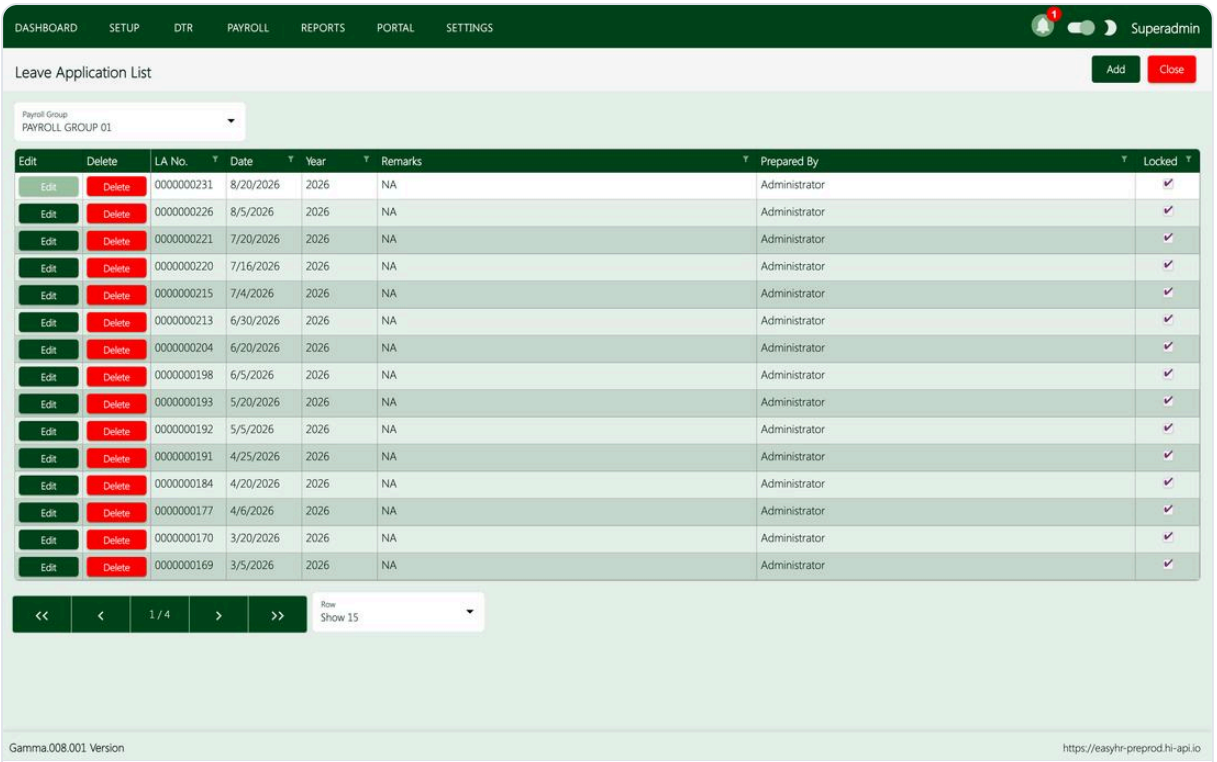
> An application filed in the employee portal appears here without any further action from the employee.

## 3.3 Leave Application

Leave applications for one cut-off period. Employees file them in the portal; the approver reviews and approves them here, and the DTR turns approved leave into paid or unpaid days according to the employee's remaining credits.

### HOW TO GET THERE

**DTR → Leave Application** `/software/leave-application-list`




Leave Application — the screen as it opens

### WHAT TO DO

1. Open **DTR → Leave Application**.
2. Click **Add**, then set the payroll group and the start and end dates of the cut-off.
3. Add the lines — employee, leave type, dates — or approve the applications the employees filed themselves.
4. Click **Save**, then **Lock**.

### COLUMNS ON THIS SCREEN

Edit · Delete · LA No. · Date · Year · Remarks · Prepared By · Locked

### FILTERS

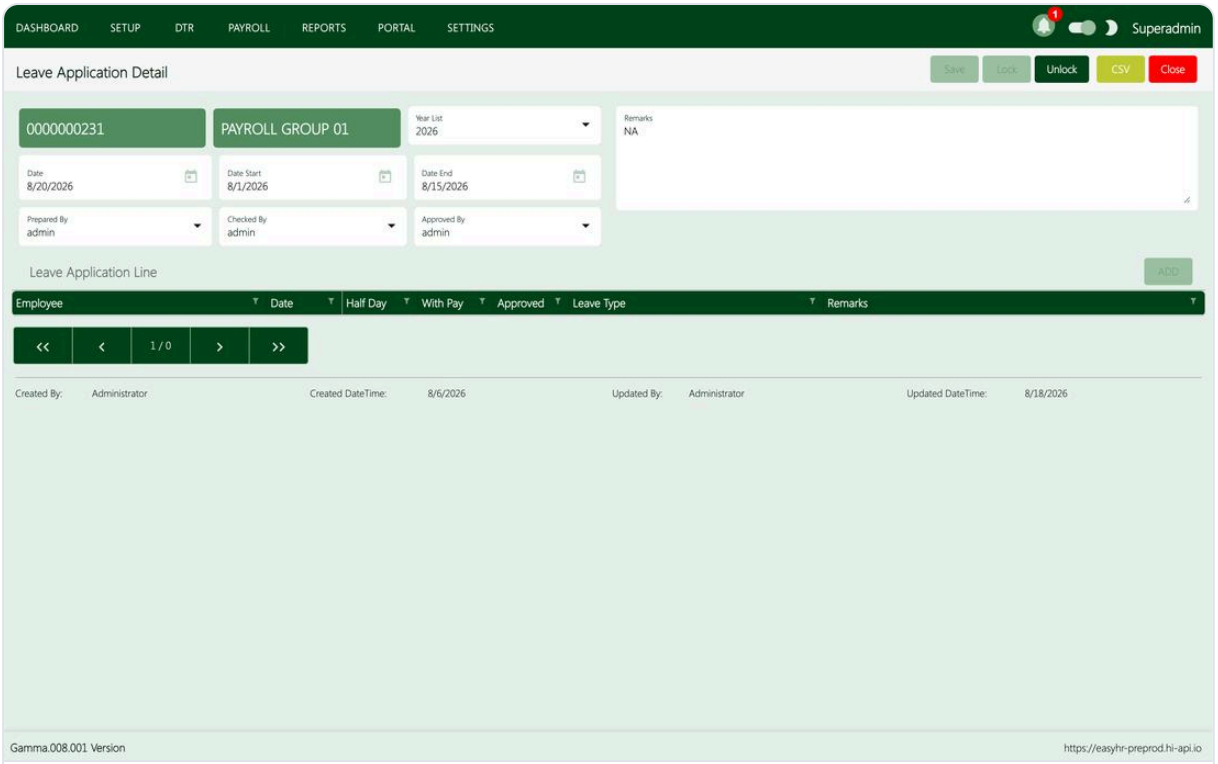
Payroll Group

### BUTTONS

Add · Close · Edit · Delete

### THE RECORD ITSELF

Click **Edit** on a row (or **Add** for a new record) to open the detail screen at `/software/leave-application-detail/<id>`.




Leave Application — the record

**Tabs:** Leave Application Line · ADD

**Fields:** Year List · Date · Date Start · Date End

**Buttons:** Save · Lock · Unlock · CSV · Close · ADD

#### LEAVE APPLICATION LINE

> This tab is the one already open in the figure above; its columns are listed below.

**Columns:** Employee · Date · Half Day · With Pay · Approved · Leave Type · Remarks

#### WHAT YOU SHOULD SEE

Approved leave appears on the DTR for the same period and is paid according to the employee's leave credits.

#### WORTH KNOWING

> Leave is only paid while credits last; days beyond the balance come through as unpaid.

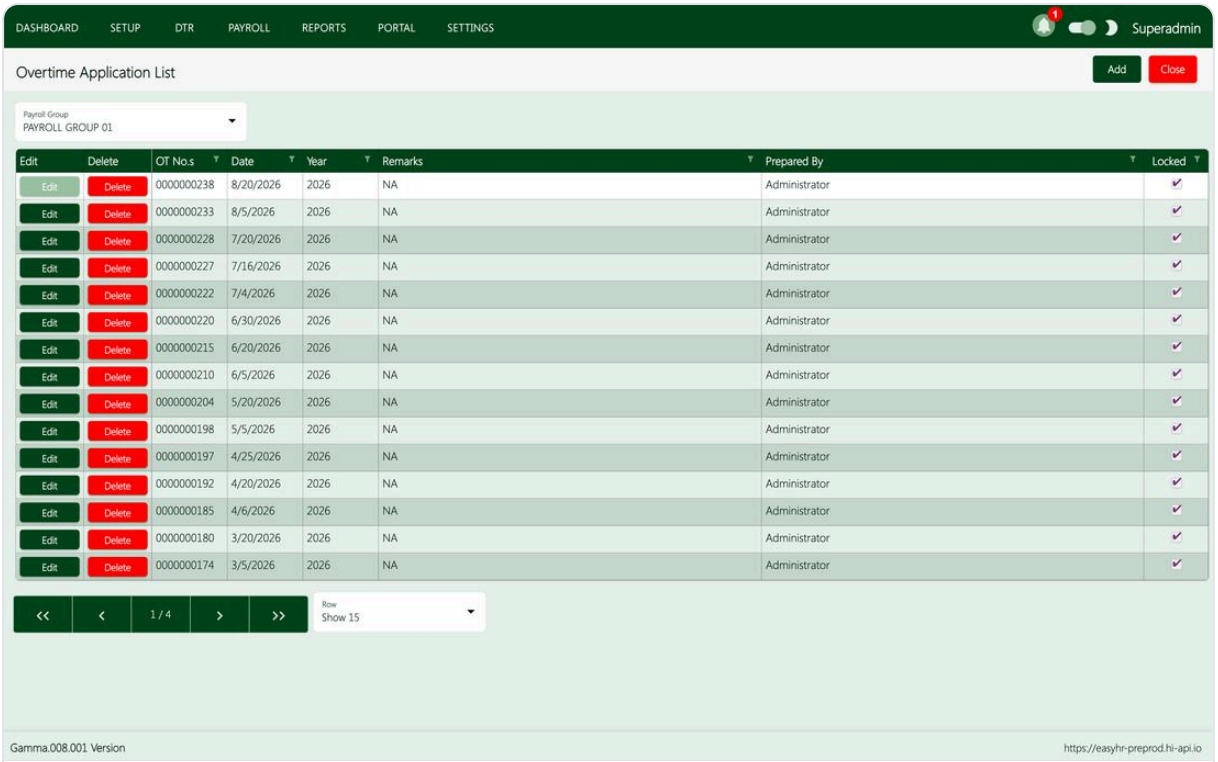
> Lock this document before generating the DTR for the period.

### 3.4 Overtime Application

Overtime applications for one cut-off period. Overtime is only paid when it has been applied for and approved — hours in the biometric log that no approved application covers are not paid as overtime.

#### HOW TO GET THERE

**DTR → Overtime Application** `/software/overtime-application-list`




Overtime Application — the screen as it opens

### WHAT TO DO

1. Open **DTR** → **Overtime Application**.
2. Click **Add**, then set the payroll group and the start and end dates of the cut-off.
3. Add the lines — employee, date, hours — or approve what the employees filed.
4. Click **Save**, then **Lock**.

### COLUMNS ON THIS SCREEN

Edit · Delete · OT No.s · Date · Year · Remarks · Prepared By · Locked

### FILTERS

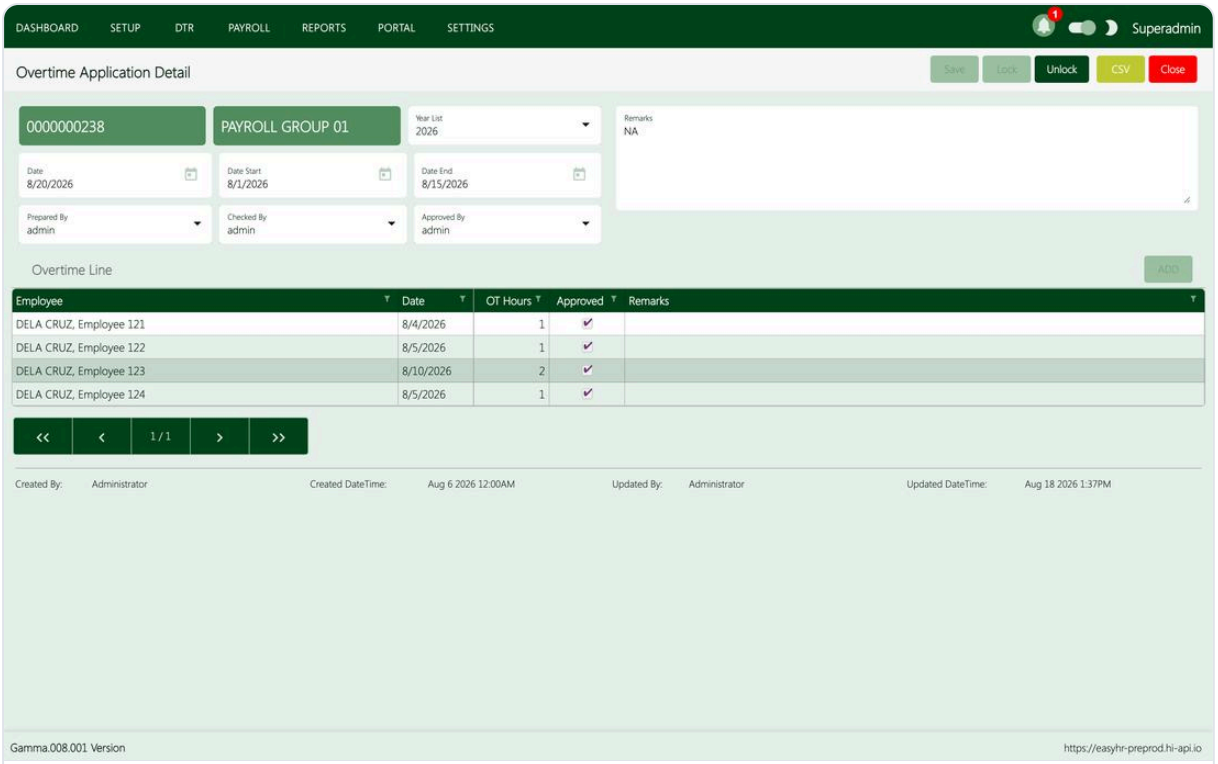
Payroll Group

### BUTTONS

Add · Close · Edit · Delete

### THE RECORD ITSELF

Click **Edit** on a row (or **Add** for a new record) to open the detail screen at `/software/overtime-application-detail/<id>`.




Overtime Application — the record

**Tabs:** Overtime Line · ADD

**Fields:** Year List · Date · Date Start · Date End

**Buttons:** Save · Lock · Unlock · CSV · Close · ADD

#### OVERTIME LINE

> This tab is the one already open in the figure above; its columns are listed below.

**Columns:** Employee · Date · OT Hours · Approved · Remarks

#### WHAT YOU SHOULD SEE

The approved hours are picked up by the DTR and paid at the overtime rates on the employee's payroll record.

#### WORTH KNOWING

> Lock this document before generating the DTR for the period.

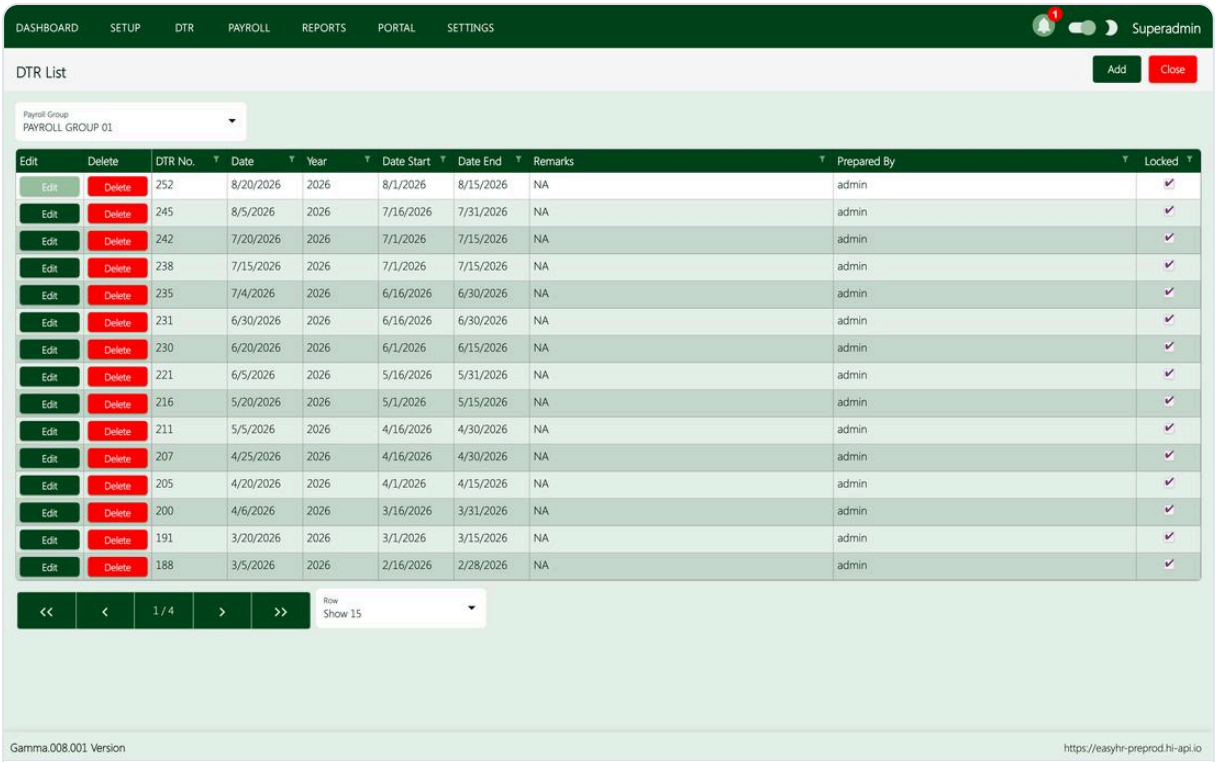
> Night differential and rest-day or holiday premiums follow from the day the overtime falls on; they do not have to be applied for separately.

## 3.5 DTR

The daily time record is the bridge between attendance and pay. One DTR document covers one payroll group for one cut-off. It takes the raw clock-in and clock-out logs, applies the employee's shift, adds the approved change shifts, leave and overtime, and produces the hours the payroll is computed from.

#### HOW TO GET THERE

**DTR → DTR** `/software/dtr-list`




DTR — the screen as it opens

### WHAT TO DO

1. Open **DTR** → **DTR**.
2. Click **Add**, then choose the payroll group, the year and the start and end dates of the cut-off.
3. Link the change shift, leave and overtime documents for the same period.
4. **Import** the biometric logs, or use **ADD** to enter logs by hand on the DTR lines. **Quick Shift** applies a shift to a block of lines in one go.
5. Click **Compute**. easyHR works out the hours for every line.
6. Check the totals per employee — late, undertime, absent, overtime, night differential.
7. Click **Save**, then **Lock**.

### COLUMNS ON THIS SCREEN

Edit · Delete · DTR No. · Date · Year · Date Start · Date End · Remarks · Prepared By · Locked

### FILTERS

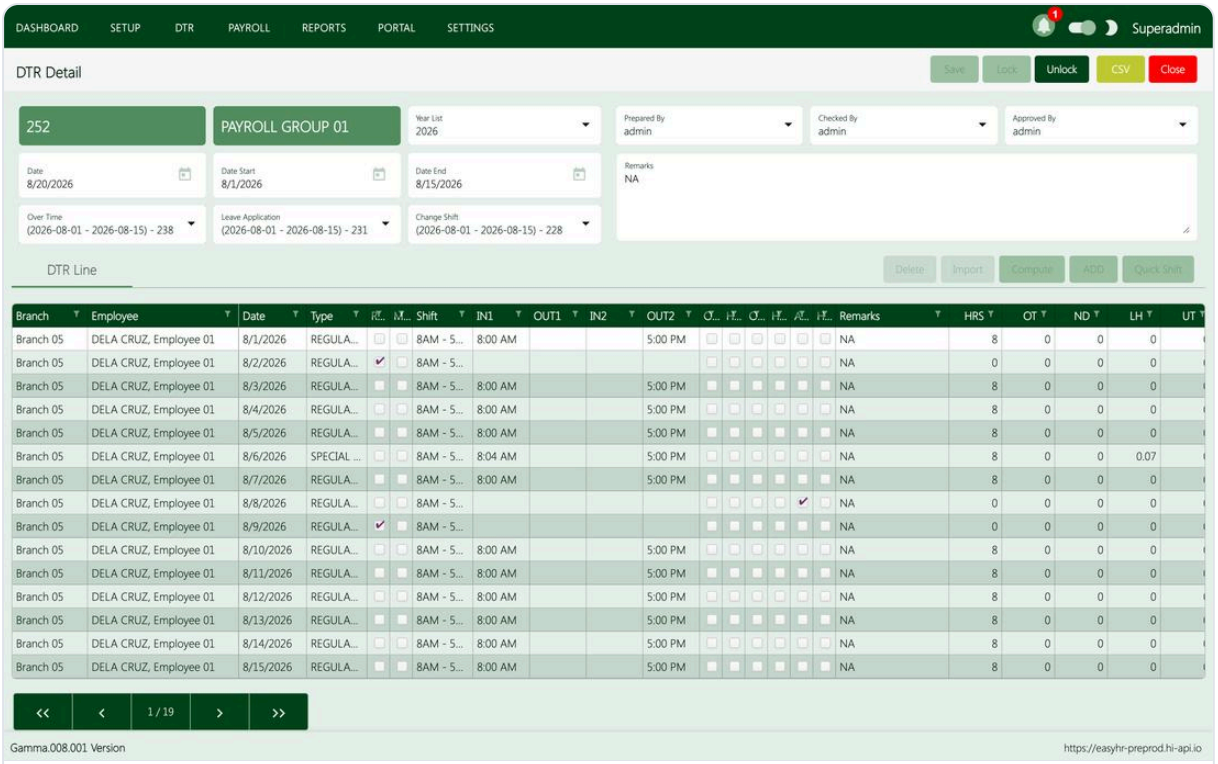
Payroll Group

### BUTTONS

Add · Close · Edit · Delete

### THE RECORD ITSELF

Click **Edit** on a row (or **Add** for a new record) to open the detail screen at `/software/dtr-detail/<id>`.




DTR — the record

**Tabs:** DTR Line

**Fields:** Year List · Date · Date Start · Date End · Over Time · Leave Application · Change Shift

**Buttons:** Save · Lock · Unlock · CSV · Close · Delete · Import · Compute · ADD · Quick Shift

### DTR LINE

This tab is the one already open in the figure above; its columns are listed below.

**Columns:** Branch · Employee · Date · Type · RD · MB · Shift · IN1 · OUT1 · IN2 · OUT2 · OL · HOL · OB · HOB · A · HA · Remarks · HRS · OT · ND · LH · UT

### WHAT YOU SHOULD SEE

A locked DTR that the payroll for the same period can be built from.

### WORTH KNOWING

**The payroll only sees a locked DTR.** If a payroll shows no employees, an unlocked DTR is the usual cause.

The import file must match the template. A file in the wrong format is refused with an error message rather than being partly loaded.

**CSV** downloads the computed DTR for checking outside the system.

# 4. Payroll

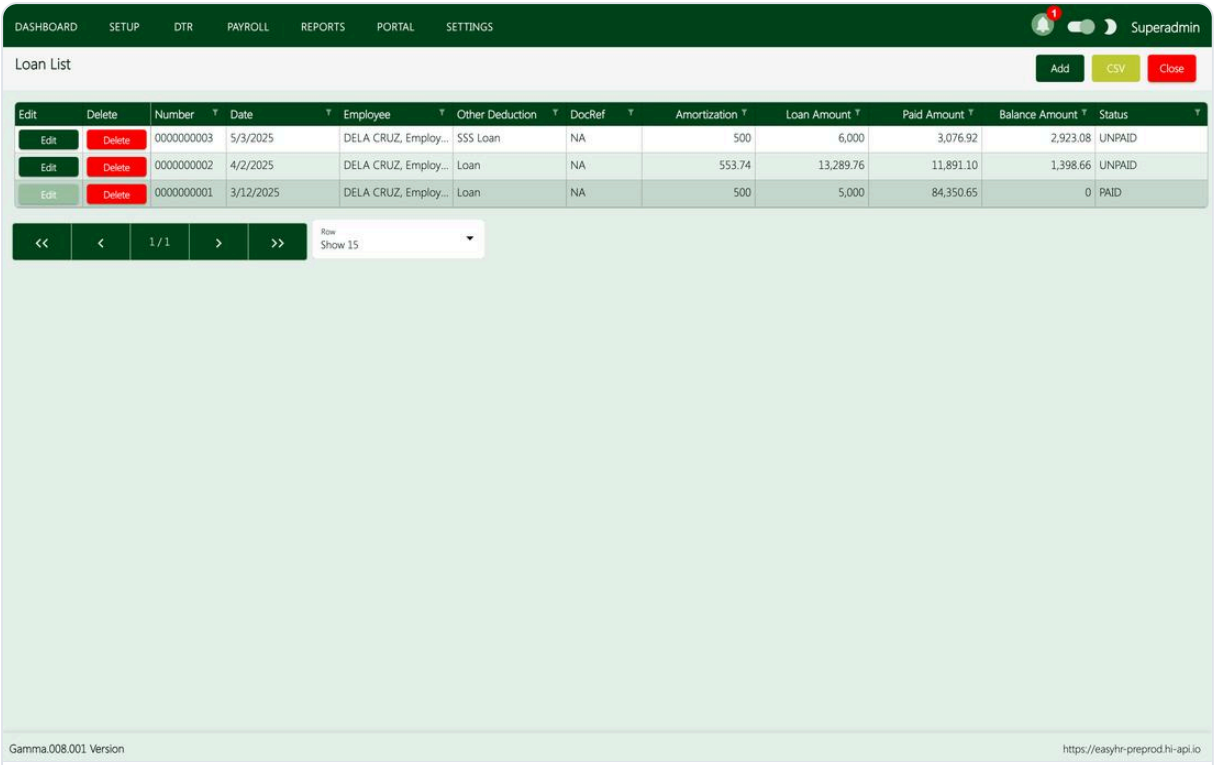
The pay run itself, together with the loans, extra income and extra deductions that feed into it.

## 4.1 Loans

Employee loans and their balances — SSS salary and calamity loans, Pag-IBIG loans and company loans. Each loan records the amount granted, the amount to be deducted each pay period and how much is still outstanding, and the payroll deducts the instalment automatically until the balance is cleared.

### HOW TO GET THERE

**PAYROLL → Loans** `/software/loan-list`




Loans — the screen as it opens

### WHAT TO DO

1. Open **PAYROLL → Loans**.
2. Choose the payroll group.
3. Click **Add** for a new loan, or **Edit** to look at an existing one.
4. Enter the employee, the loan type, the principal, the instalment per pay period and the date the deduction starts.
5. Click **Save**, then **Lock**.

### COLUMNS ON THIS SCREEN

Edit · Delete · Number · Date · Employee · Other Deduction · DocRef · Amortization · Loan Amount · Paid Amount · Balance Amount · Status

### BUTTONS

Add · CSV · Close · Edit · Delete

#### WHAT YOU SHOULD SEE

The instalment is deducted on every payroll from the start date until the balance reaches zero.

#### WORTH KNOWING

> The remaining balance is maintained by the system; do not adjust it by hand to correct a single deduction — correct the payroll instead.

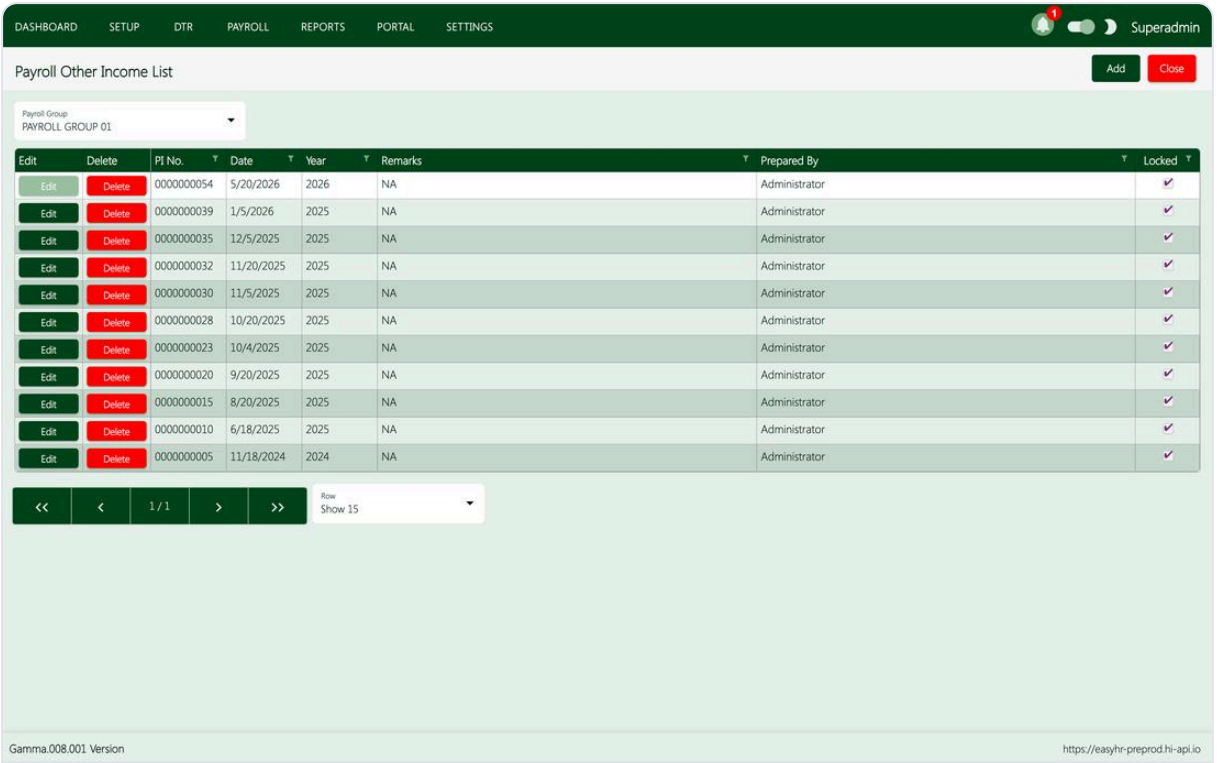
> **CSV** is available both on the list and inside a loan record.

## 4.2 Other Income

The extra income actually paid in one pay period — allowances, bonuses, incentives — entered per employee. The income types themselves come from **SETUP** → **Other Income**; this screen puts amounts against them. The 13th month computation is also produced here.

#### HOW TO GET THERE

**PAYROLL → Other Income** `/software/payroll-other-income-list`




Other Income — the screen as it opens

#### WHAT TO DO

1. Open **PAYROLL** → **Other Income**.
2. Click **Add**, then choose the payroll group and the pay period.
3. Add one line per employee and income type with the amount, or **Import** the lines from a spreadsheet.
4. Click **Save**, then **Lock**.

#### COLUMNS ON THIS SCREEN

Edit · Delete · PI No. · Date · Year · Remarks · Prepared By · Locked

#### FILTERS

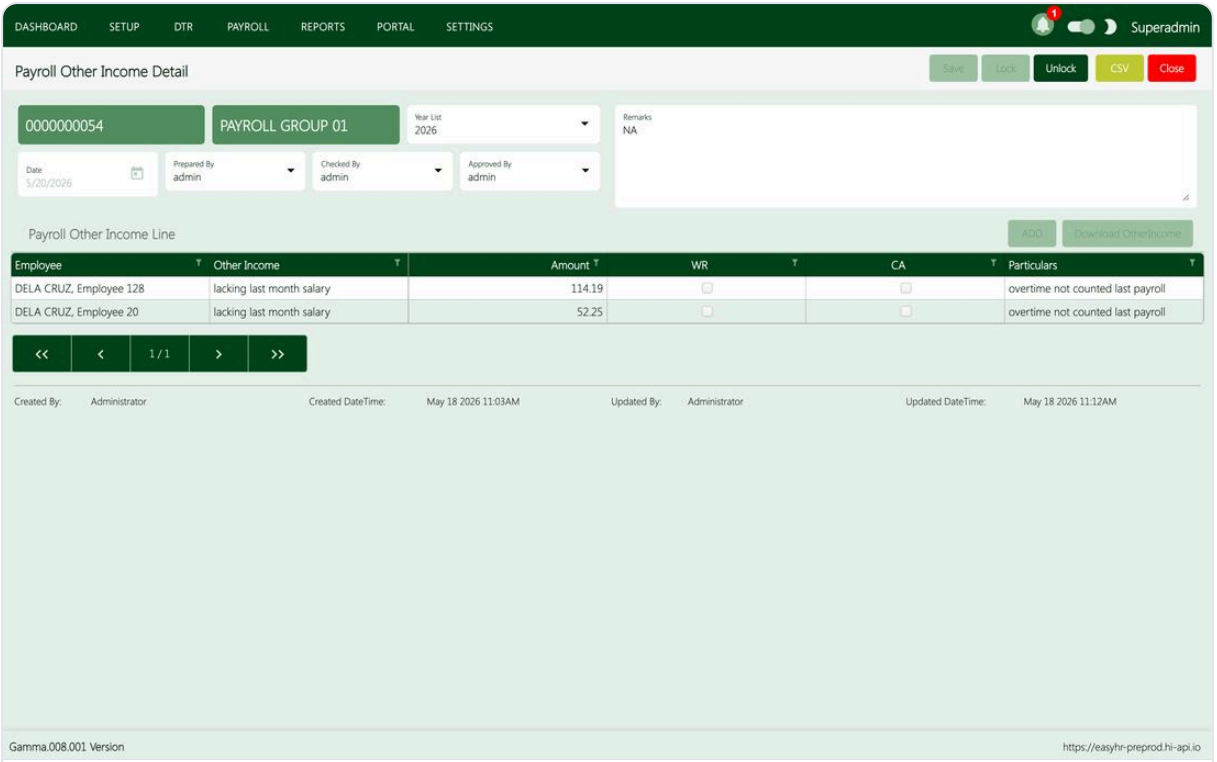
Payroll Group

### BUTTONS

Add Close Edit Delete

### THE RECORD ITSELF

Click **Edit** on a row (or **Add** for a new record) to open the detail screen at `/software/payroll-other-income-detail/<id>`.




Other Income — the record

**Tabs:** Payroll Other Income Line

**Fields:** Year List Date

**Buttons:** Save Lock Unlock CSV Close ADD Download OtherIncome

### PAYROLL OTHER INCOME LINE

> This tab is the one already open in the figure above; its columns are listed below.

**Columns:** Employee Other Income Amount WR CA Particulars

### WHAT YOU SHOULD SEE

The amounts are added to the payroll for the same period, taxed or not according to how the income type was set up.

### WORTH KNOWING

> Lock this document before computing the payroll for the period.

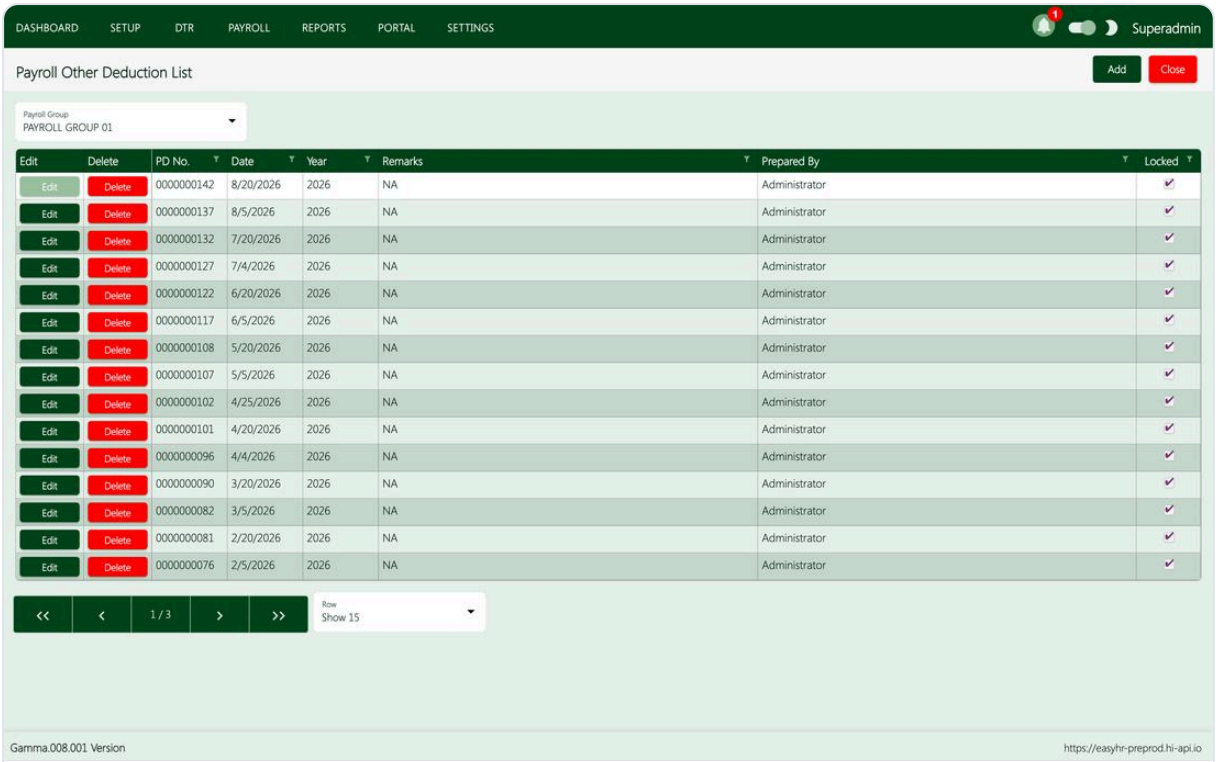
> Whether an amount is taxable, whether it appears on the payslip and whether it counts towards the 13th month are all decided by the income type in Setup, not here.

## 4.3 Other Deductions

The extra deductions taken in one pay period — one-off deductions and company charges that are not loans with a running balance.

### HOW TO GET THERE

**PAYROLL → Other Deductions** `/software/payroll-other-deduction-list`




Other Deductions — the screen as it opens

### WHAT TO DO

1. Open **PAYROLL → Other Deductions**.
2. Click **Add**, then choose the payroll group and the pay period.
3. Add one line per employee and deduction type with the amount, or click **Get Loan** to pull in the instalments due on the employees' loans for that period.
4. Click **Save**, then **Lock**.

### COLUMNS ON THIS SCREEN

Edit · Delete · PD No. · Date · Year · Remarks · Prepared By · Locked

### FILTERS

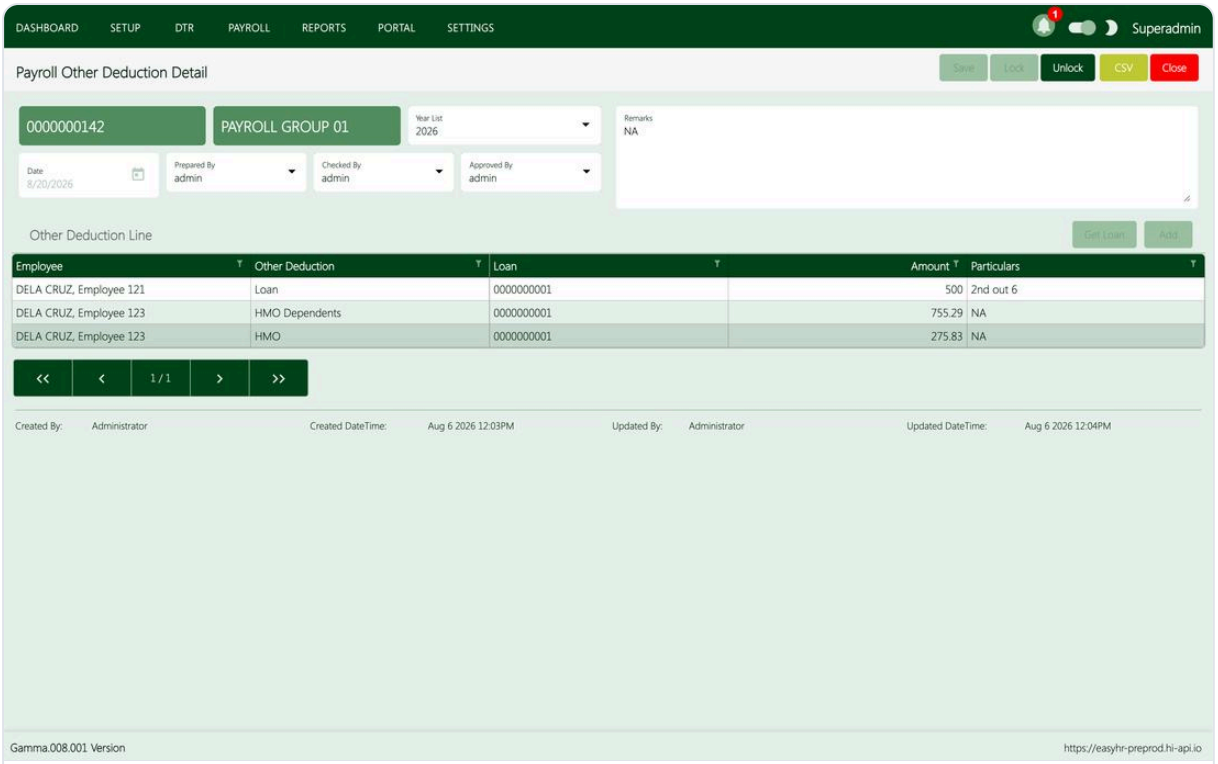
Payroll Group

### BUTTONS

Add · Close · Edit · Delete

### THE RECORD ITSELF

Click **Edit** on a row (or **Add** for a new record) to open the detail screen at `/software/payroll-other-deduction-detail/<id>`.




Other Deductions — the record

**Tabs:** Other Deduction Line

**Fields:** Year List · Date

**Buttons:** Save · Lock · Unlock · CSV · Close · Get Loan · Add

#### OTHER DEDUCTION LINE

> This tab is the one already open in the figure above; its columns are listed below.

**Columns:** Employee · Other Deduction · Loan · Amount · Particulars

#### WHAT YOU SHOULD SEE

The amounts are deducted on the payroll for the same period.

#### WORTH KNOWING

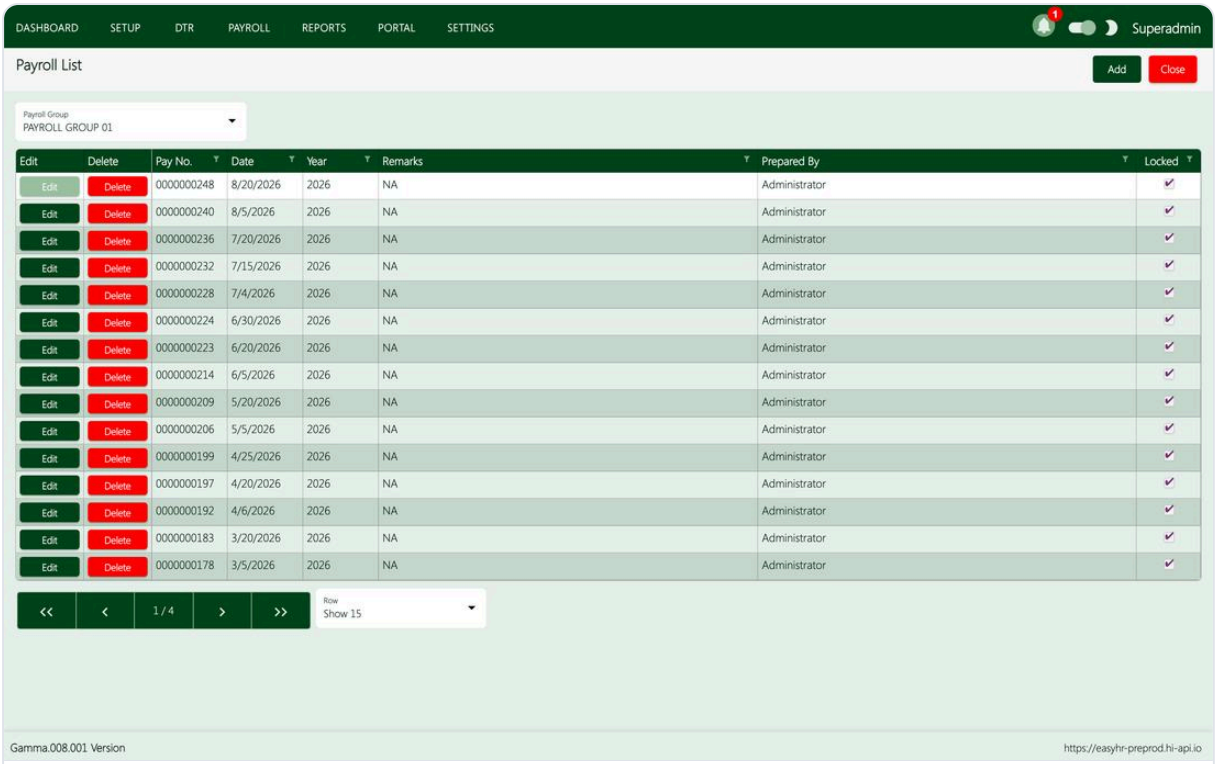
> Use a loan rather than a deduction when the amount is to be recovered over several pay periods; a loan keeps the running balance for you.

## 4.4 Payroll

The pay run. A payroll document takes a locked DTR for one payroll group and one cut-off, applies the employee's rates, the statutory contributions, the loans, the extra income and the extra deductions, and produces the net pay for every employee in the group.

#### HOW TO GET THERE

**PAYROLL → Payroll** `/software/payroll-list`




Payroll — the screen as it opens

### WHAT TO DO

1. Open **PAYROLL** → **Payroll**.
2. Click **Add**, then choose the payroll group, the year and the pay date.
3. Link the **DTR**, the **Other Income** and the **Other Deductions** documents for the same period. All of them must already be locked.
4. Click **Download Employee** to bring the employees into the run, then **Download DTR** to bring in their hours.
5. Click **Compute**. easyHR applies the rates, the contribution tables, the loans and the other income and deductions, and fills in the payroll lines.
6. Check the computed lines — gross, contributions, loans, other income, other deductions, net.
7. Click **Save**, then **Lock**.
8. Print the worksheet and the payslips from the Reports menu.

### COLUMNS ON THIS SCREEN

Edit · Delete · Pay No. · Date · Year · Remarks · Prepared By · Locked

### FILTERS

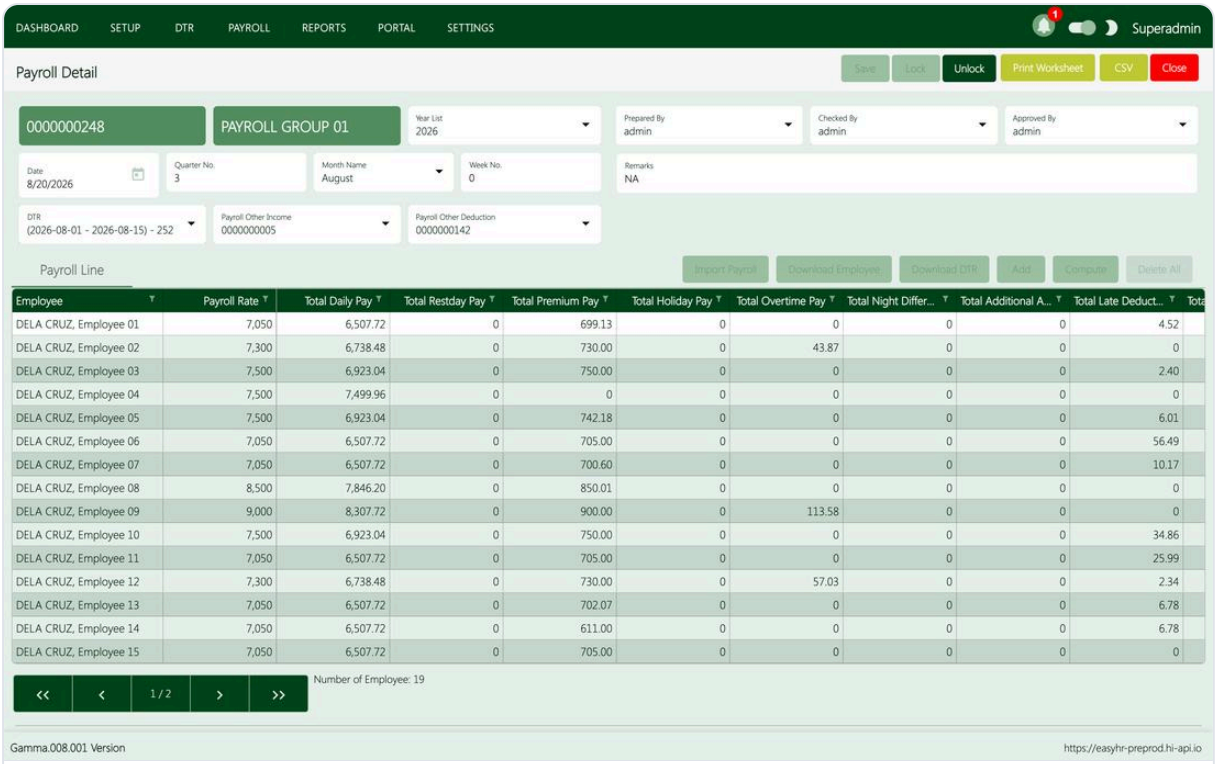
Payroll Group

### BUTTONS

Add · Close · Edit · Delete

### THE RECORD ITSELF

Click **Edit** on a row (or **Add** for a new record) to open the detail screen at `/software/payroll-detail/<id>`.




Payroll — the record

**Tabs:** Payroll Line

**Fields:** Year List · Date · Quarter No. · Month Name · Week No. · DTR · Payroll Other Income · Payroll Other Deduction

**Buttons:** Save · Lock · Unlock · Print Worksheet · CSV · Close · Import Payroll · Download Employee · Download DTR · Add · Compute · Delete All

### PAYROLL LINE

This tab is the one already open in the figure above; its columns are listed below.

**Columns:** Employee · Payroll Rate · Total Daily Pay · Total Restday Pay · Total Premium Pay · Total Holiday Pay · Total Overtime Pay · Total Night Differential Pay · Total Additional Allowance · Total Late Deduction · Total Undertime Deduction

### WHAT YOU SHOULD SEE

A locked payroll from which payslips, the bank file and every payroll report can be produced.

### WORTH KNOWING

**Lock the payroll before printing payslips.** The payslip report reads locked payrolls only.

If employees are missing from the run, check that the DTR for the same period is locked and that the employees belong to the payroll group.

Unlocking a payroll that has already been paid out will not undo the payment; it only re-opens the document.

**Delete All** clears every line in the run so it can be rebuilt. It does not delete the payroll document itself.

# 5. Reports

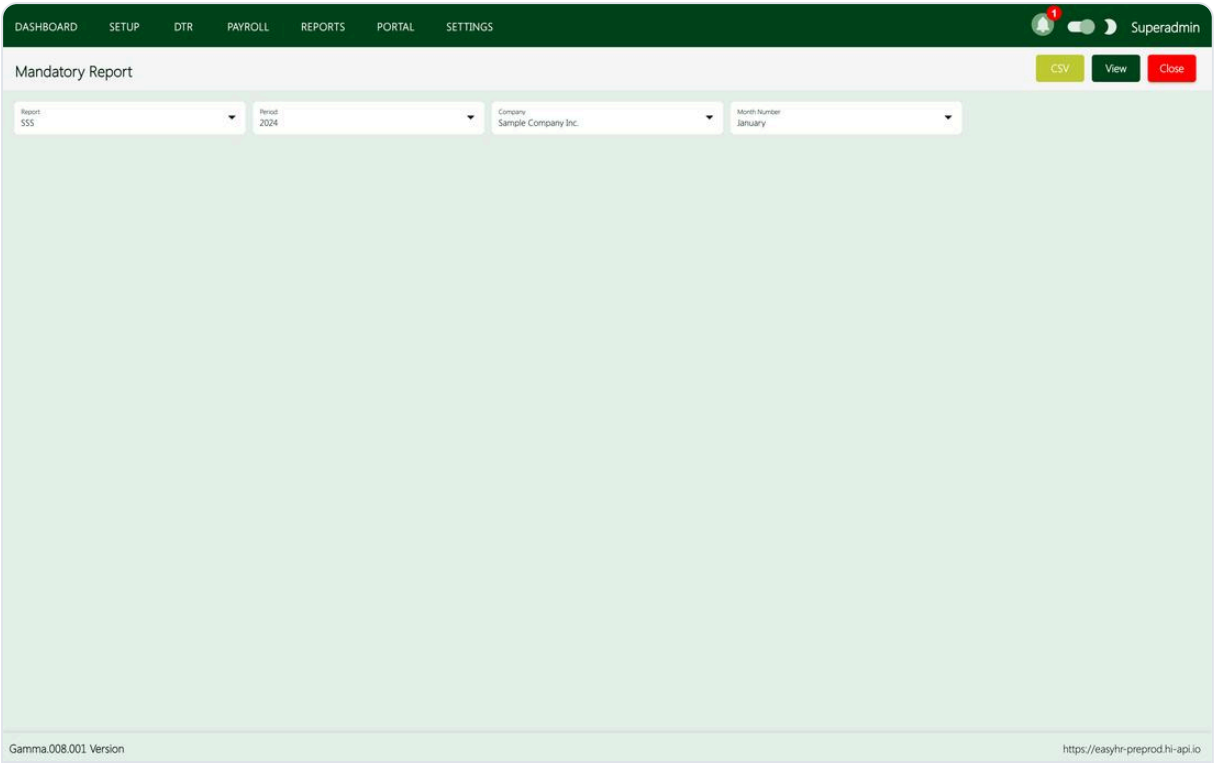
Twenty-five reports covering payroll, statutory contributions, loans and attendance. All of them read data that already exists; none of them change anything.

## 5.1 Mandatory Reports

The statutory contribution reports — SSS, PhilHealth and HDMF — for a chosen period, in the form the agencies expect. This is what is used for remittance.

### HOW TO GET THERE

**REPORTS → Mandatory Reports** `/software/report-mandatory`




Mandatory Reports — the screen as it opens

### WHAT TO DO

1. Open **REPORTS → Mandatory Reports**.
2. Set the selection at the top of the screen: **Report**, **Period**, **Company**, **Month Number**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **CSV** instead to download the same figures as a spreadsheet file.
5. Click **Close** to leave the screen.

### FIELDS ON THIS SCREEN

Report · Period · Company · Month Number

### BUTTONS

CSV · View · Close

### WHAT YOU SHOULD SEE

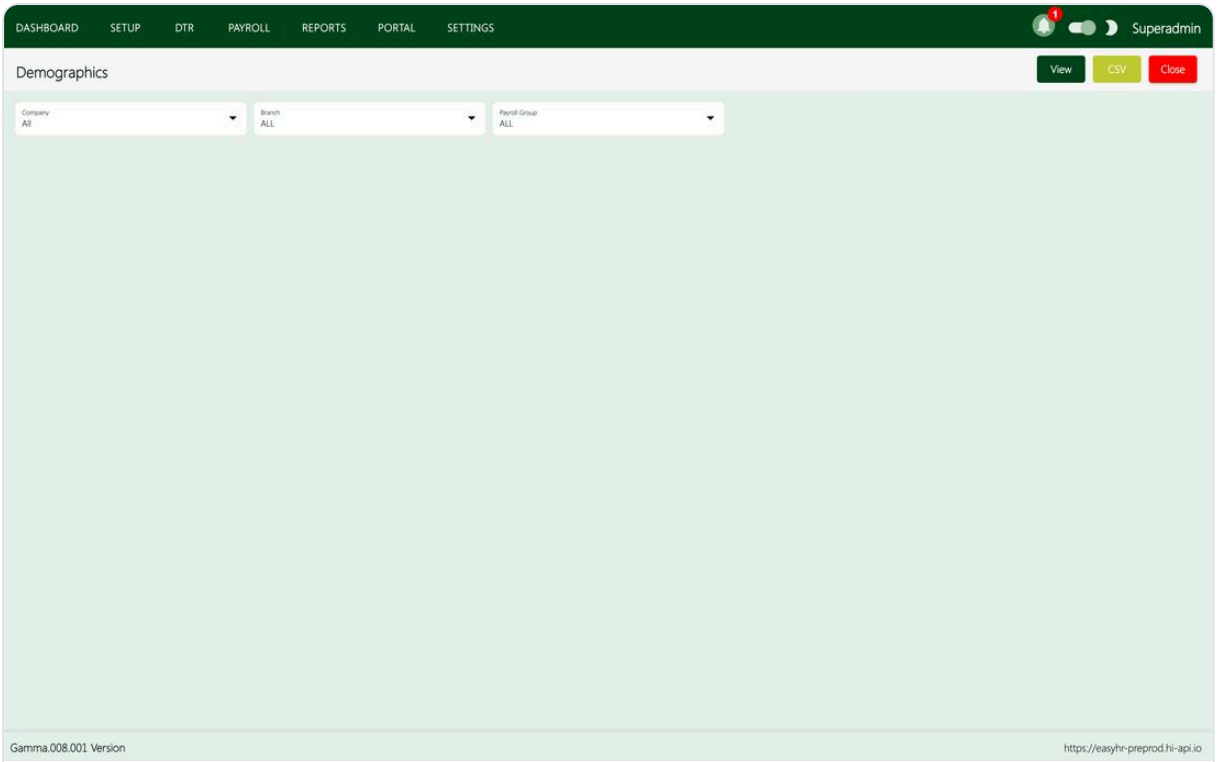
The contribution due per employee and the totals to be remitted.

## 5.2 Demographics

A profile of the workforce: age, sex, civil status, length of service and the like, for the whole company or a chosen branch or payroll group.

### HOW TO GET THERE

**REPORTS → Demographics** `/software/report-demographics`




Demographics — the screen as it opens

### WHAT TO DO

1. Open **REPORTS → Demographics**.
2. Set the selection at the top of the screen: **Company**, **Branch**, **Payroll Group**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **CSV** instead to download the same figures as a spreadsheet file.
5. Click **Close** to leave the screen.

### FIELDS ON THIS SCREEN

Company · Branch · Payroll Group

### BUTTONS

View · CSV · Close

### WHAT YOU SHOULD SEE

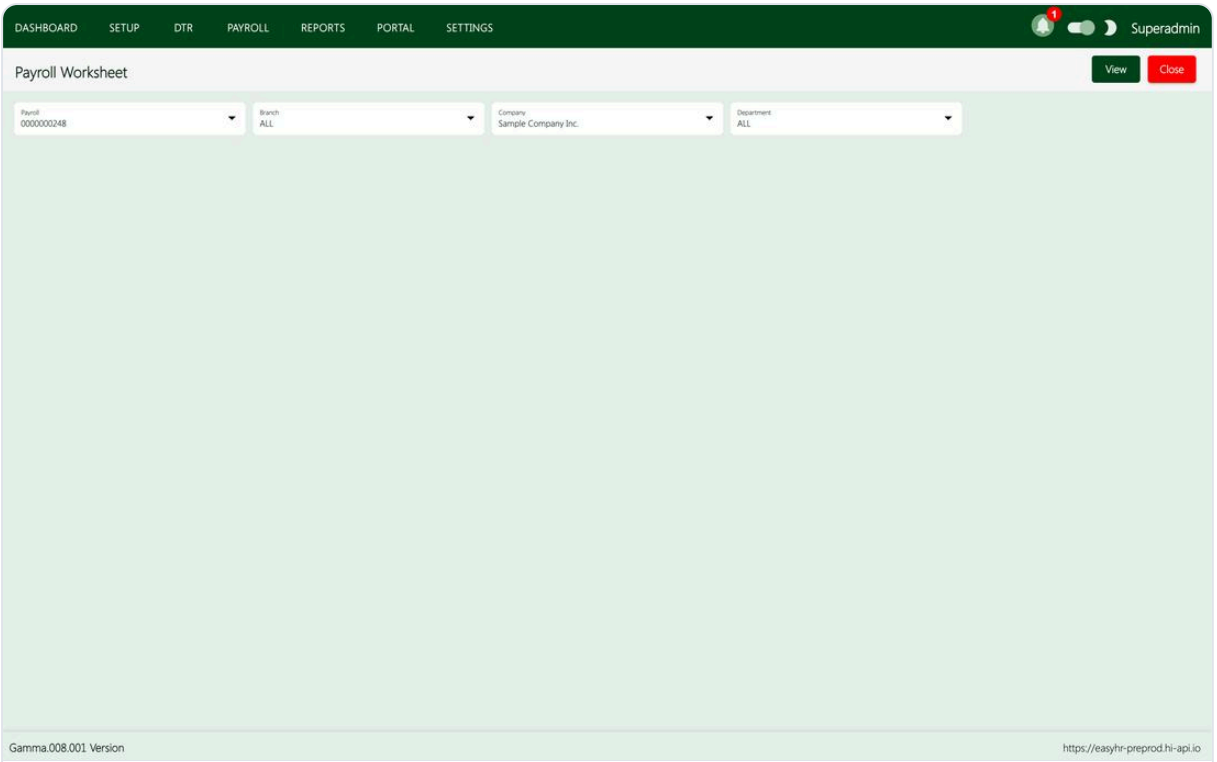
A breakdown of the workforce by the characteristics chosen.

## 5.3 Payroll Worksheet

The full working of one pay run for one payroll group: every employee, every component of gross pay, every deduction and the net. It is the report to check before a payroll is paid out.

HOW TO GET THERE

**REPORTS → Payroll Worksheet** `/software/report-payroll-work-sheet-v1`




Payroll Worksheet — the screen as it opens

WHAT TO DO

1. Open **REPORTS → Payroll Worksheet**.
2. Set the selection at the top of the screen: **Payroll**, **Branch**, **Company**, **Department**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

FIELDS ON THIS SCREEN

Payroll · Branch · Company · Department

BUTTONS

View · Close

WHAT YOU SHOULD SEE

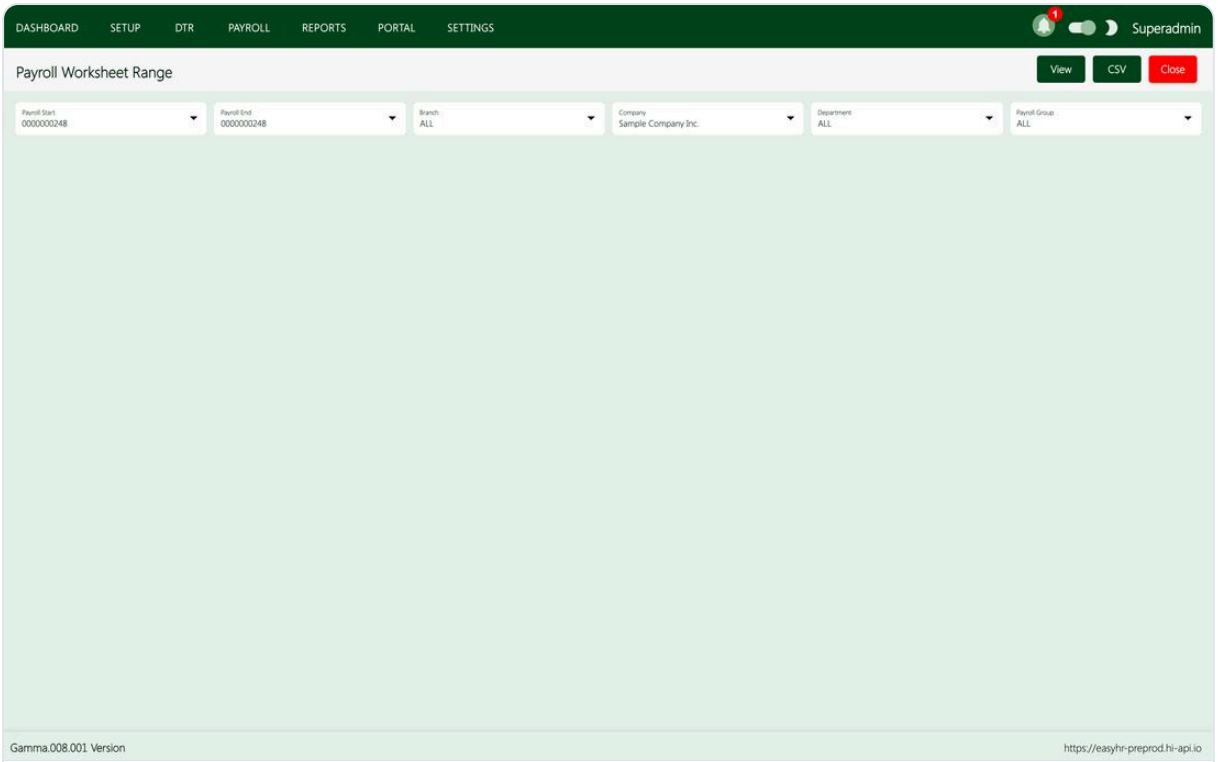
One line per employee with the complete computation, and column totals.

## 5.4 Payroll Worksheet Range

The payroll worksheet across a range of pay periods instead of a single one — used to look at a month or a quarter in one view.

HOW TO GET THERE

**REPORTS → Payroll Worksheet Range** `/software/report-payroll-work-sheet`




Payroll Worksheet Range — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Payroll Worksheet Range**.
2. Set the selection at the top of the screen: **Payroll Start**, **Payroll End**, **Branch**, **Company**, **Department**, **Payroll Group**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **CSV** instead to download the same figures as a spreadsheet file.
5. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Payroll Start · Payroll End · Branch · Company · Department · Payroll Group

#### BUTTONS

View · CSV · Close

#### WHAT YOU SHOULD SEE

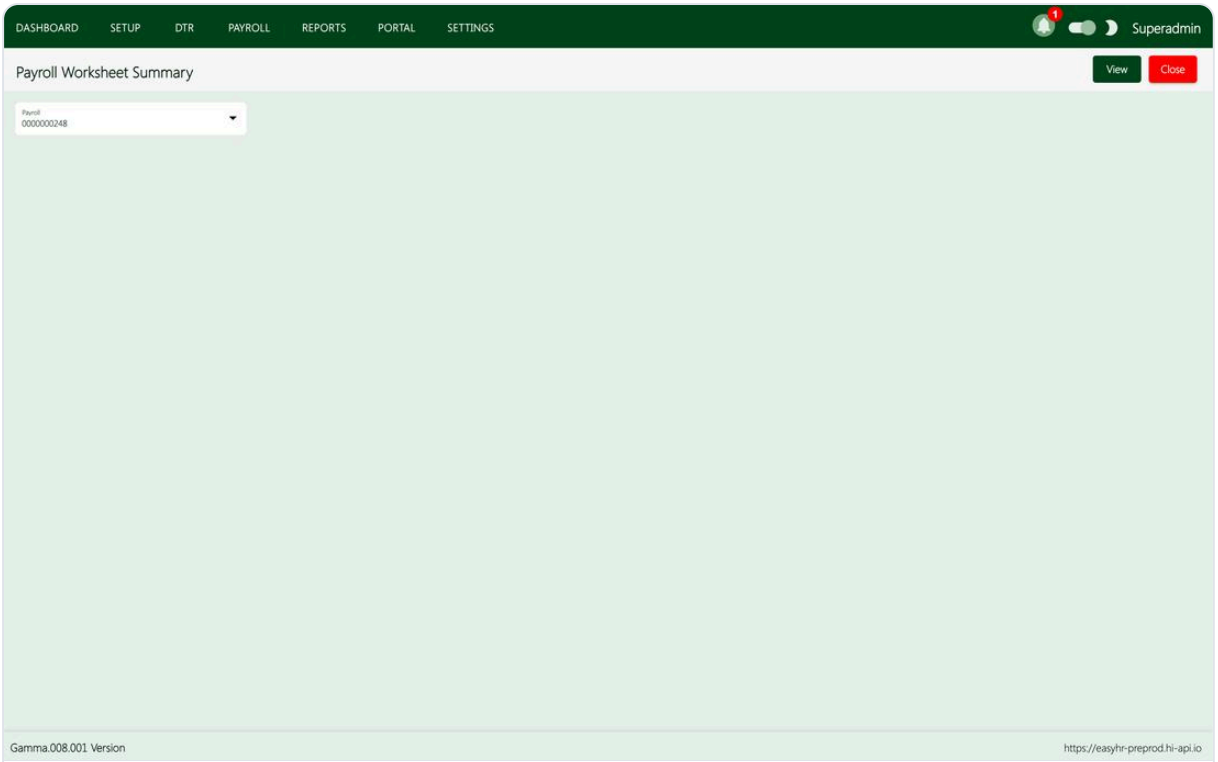
The same working as the payroll worksheet, accumulated over the chosen range.

### 5.5 Payroll Summary Worksheet Report

A condensed payroll worksheet: the totals per employee without the detail of how each figure was reached.

#### HOW TO GET THERE

**REPORTS → Payroll Summary Worksheet Report** `/software/payroll-summary-worksheet-report`




Payroll Summary Worksheet Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Payroll Summary Worksheet Report**.
2. Set the selection at the top of the screen: **Payroll**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Payroll

#### BUTTONS

View Close

#### WHAT YOU SHOULD SEE

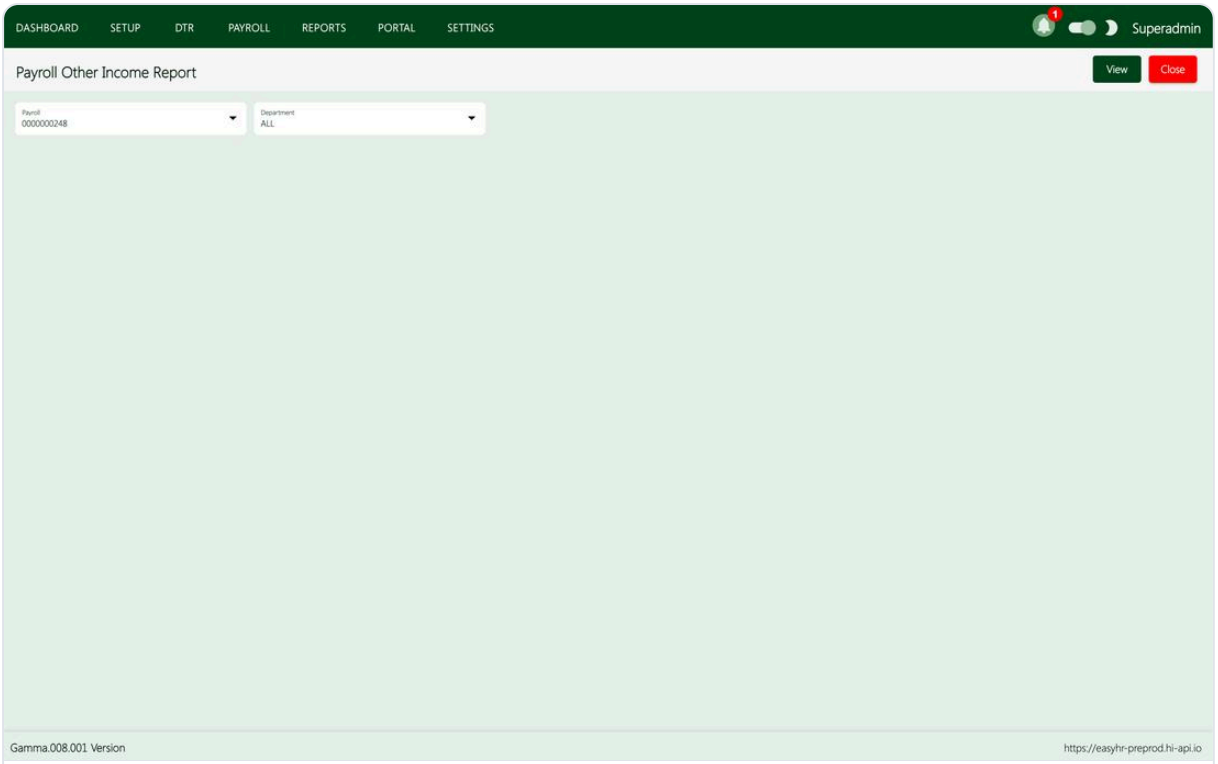
One summary line per employee for the chosen period.

### 5.6 Payroll Other Income

The extra income paid in a period, listed by employee and income type.

#### HOW TO GET THERE

**REPORTS → Payroll Other Income** `/software/report-payroll-other-income`




Payroll Other Income — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Payroll Other Income**.
2. Set the selection at the top of the screen: **Payroll**, **Department**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Payroll · Department

#### BUTTONS

View · Close

#### WHAT YOU SHOULD SEE

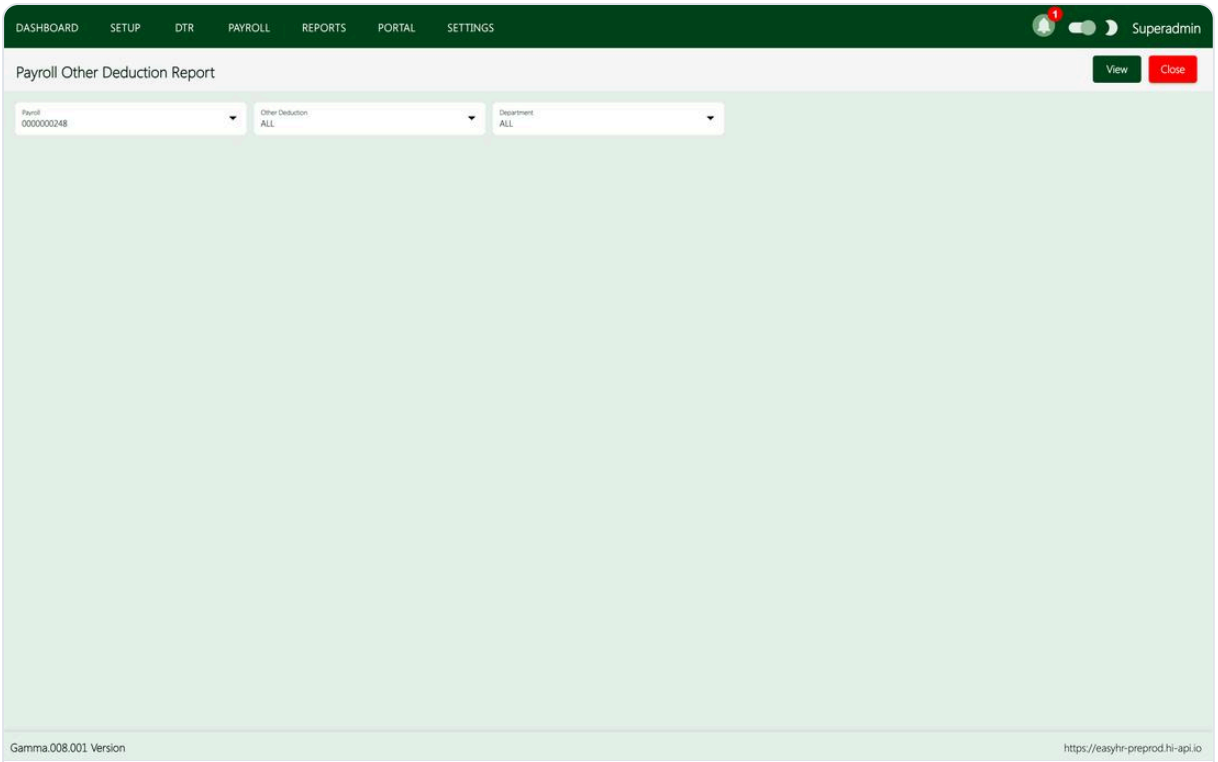
One line per employee and income type, with totals.

## 5.7 Payroll Other Deduction

The extra deductions taken in a period, listed by employee and deduction type.

#### HOW TO GET THERE

**REPORTS → Payroll Other Deduction** `/software/report-payroll-other-deduction`




Payroll Other Deduction — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Payroll Other Deduction**.
2. Set the selection at the top of the screen: **Payroll**, **Other Deduction**, **Department**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Payroll · Other Deduction · Department

#### BUTTONS

View · Close

#### WHAT YOU SHOULD SEE

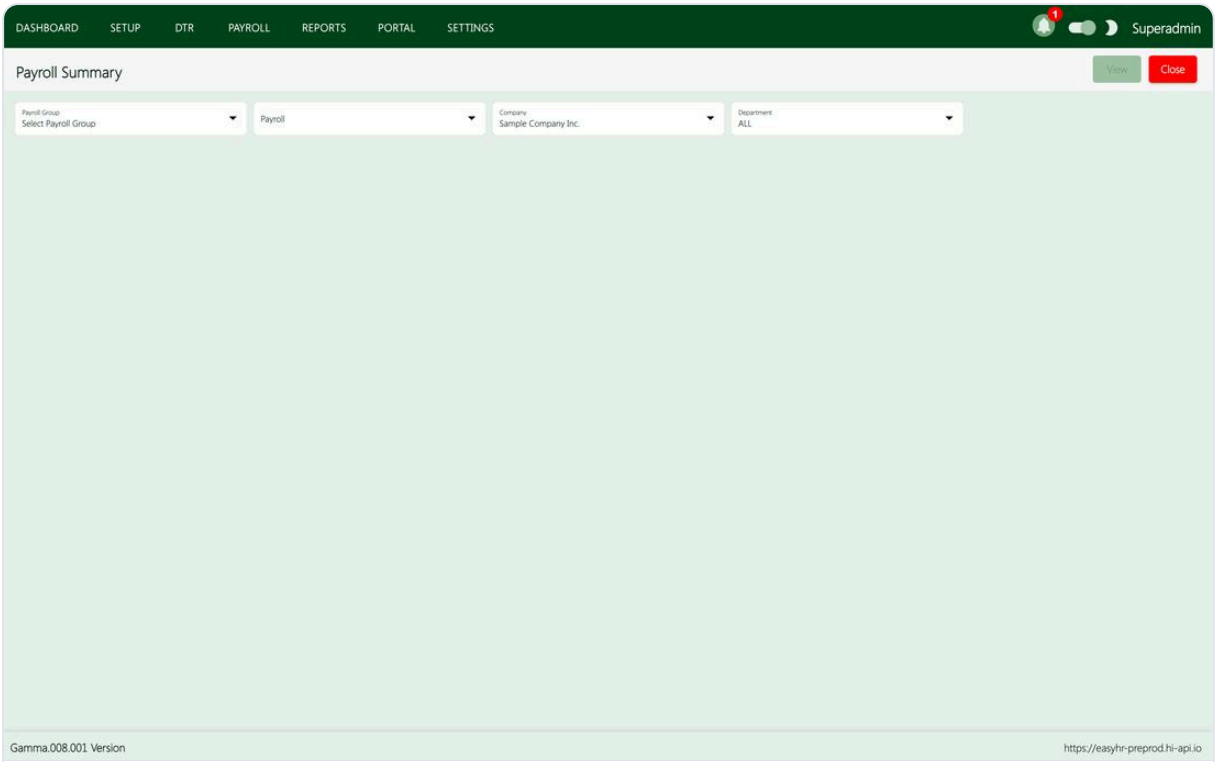
One line per employee and deduction type, with totals.

### 5.8 Payroll Summary

The payroll for a period reduced to its totals — gross, contributions, deductions and net for the group as a whole. The report management signs off.

#### HOW TO GET THERE

**REPORTS → Payroll Summary** `/software/report-payroll-summary`




Payroll Summary — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Payroll Summary**.
2. Set the selection at the top of the screen: **Payroll Group**, **Payroll**, **Company**, **Department**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Payroll Group · Payroll · Company · Department

#### BUTTONS

View · Close

#### WHAT YOU SHOULD SEE

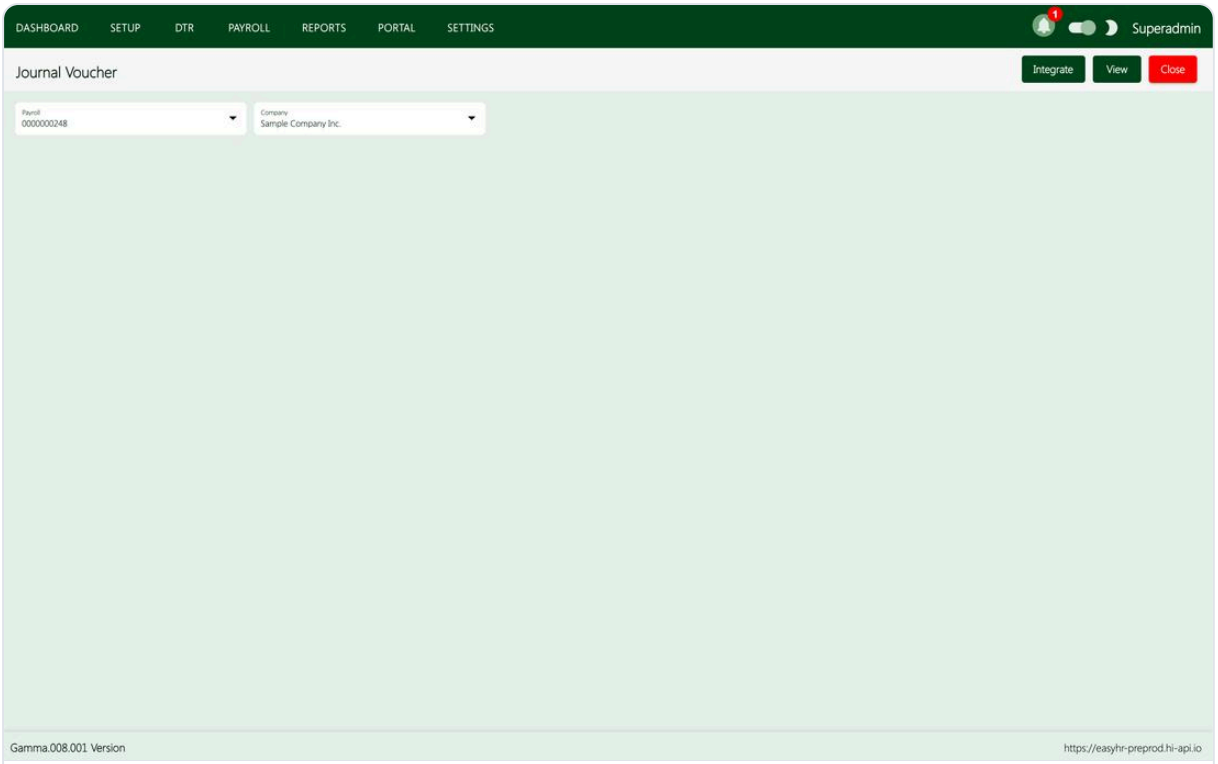
Totals for the payroll group and the period chosen.

### 5.9 Journal Voucher

The payroll expressed as an accounting entry, with the debit and credit against each account. It is the bridge between easyHR and the general ledger, and the accounts it uses are the ones set on the company record.

#### HOW TO GET THERE

**REPORTS → Journal Voucher** `/software/report-company-journal-voucher`




Journal Voucher — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Journal Voucher**.
2. Set the selection at the top of the screen: **Payroll**, **Company**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Payroll · Company

#### BUTTONS

Integrate · View · Close

#### WHAT YOU SHOULD SEE

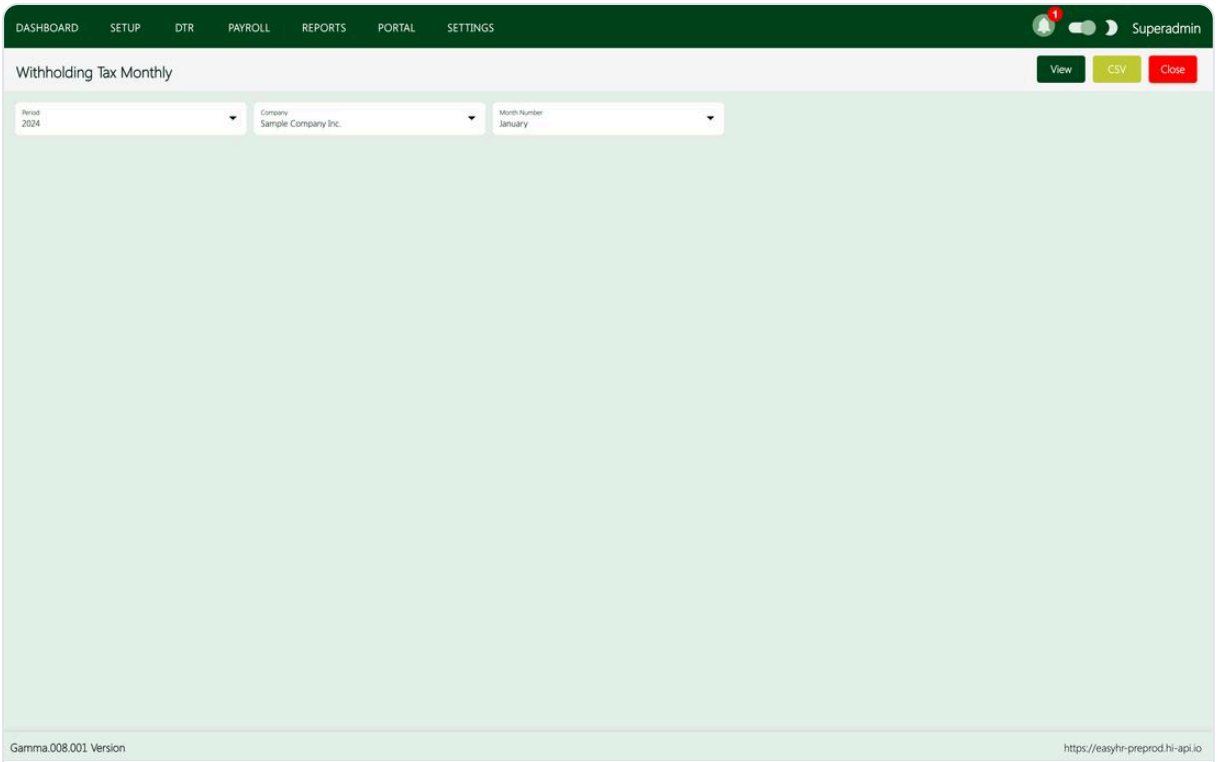
A balanced journal entry for the chosen payroll.

## 5.10 Withholding Tax Monthly

The withholding tax deducted in a calendar month, per employee — the figures behind the monthly remittance return.

#### HOW TO GET THERE

**REPORTS → Withholding Tax Monthly** `/software/report-month-withholding-tax`




Withholding Tax Monthly — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Withholding Tax Monthly**.
2. Set the selection at the top of the screen: **Period**, **Company**, **Month Number**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **CSV** instead to download the same figures as a spreadsheet file.
5. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Period · Company · Month Number

#### BUTTONS

View · CSV · Close

#### WHAT YOU SHOULD SEE

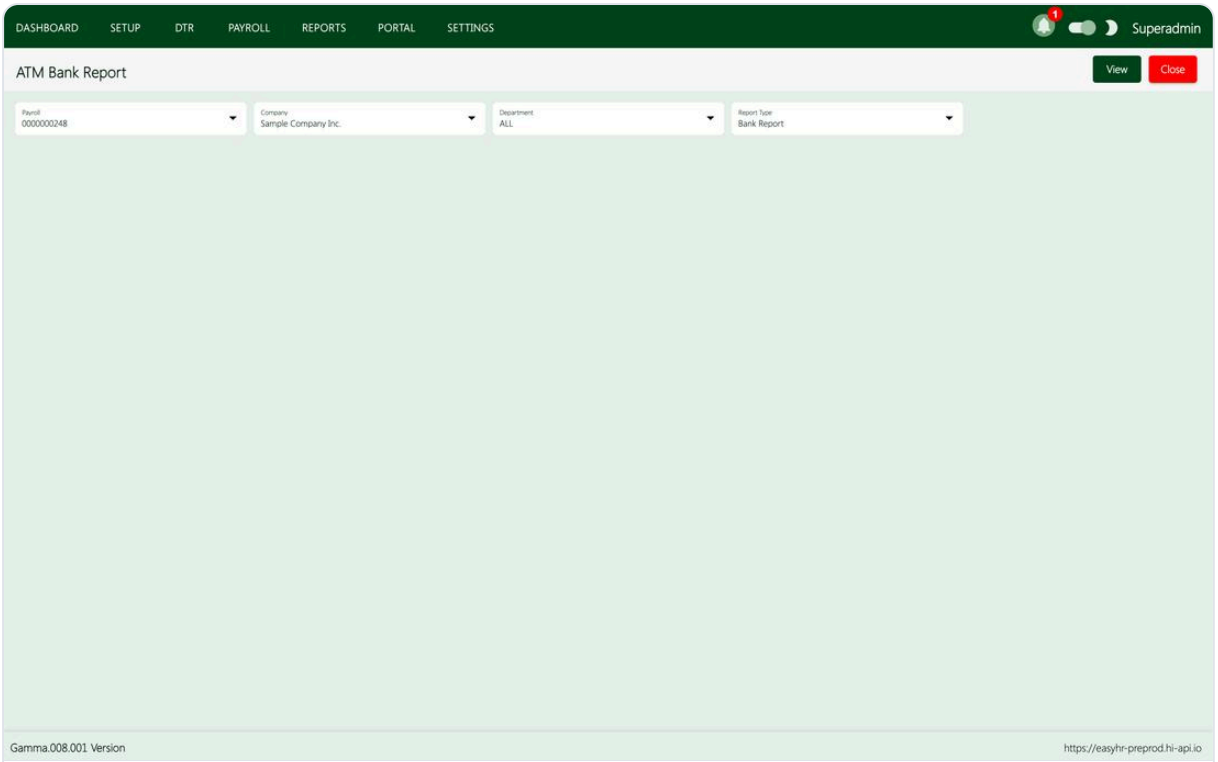
Tax withheld per employee for the month, with the total to be remitted.

## 5.11 ATM Bank Report

The payroll credit file for the bank: each employee's account number and the net amount to be credited on the pay date.

#### HOW TO GET THERE

**REPORTS → ATM Bank Report** `/software/atm-bank-report`




ATM Bank Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → ATM Bank Report**.
2. Set the selection at the top of the screen: **Payroll**, **Company**, **Department**, **Report Type**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Payroll · Company · Department · Report Type

#### BUTTONS

View · Close

#### WHAT YOU SHOULD SEE

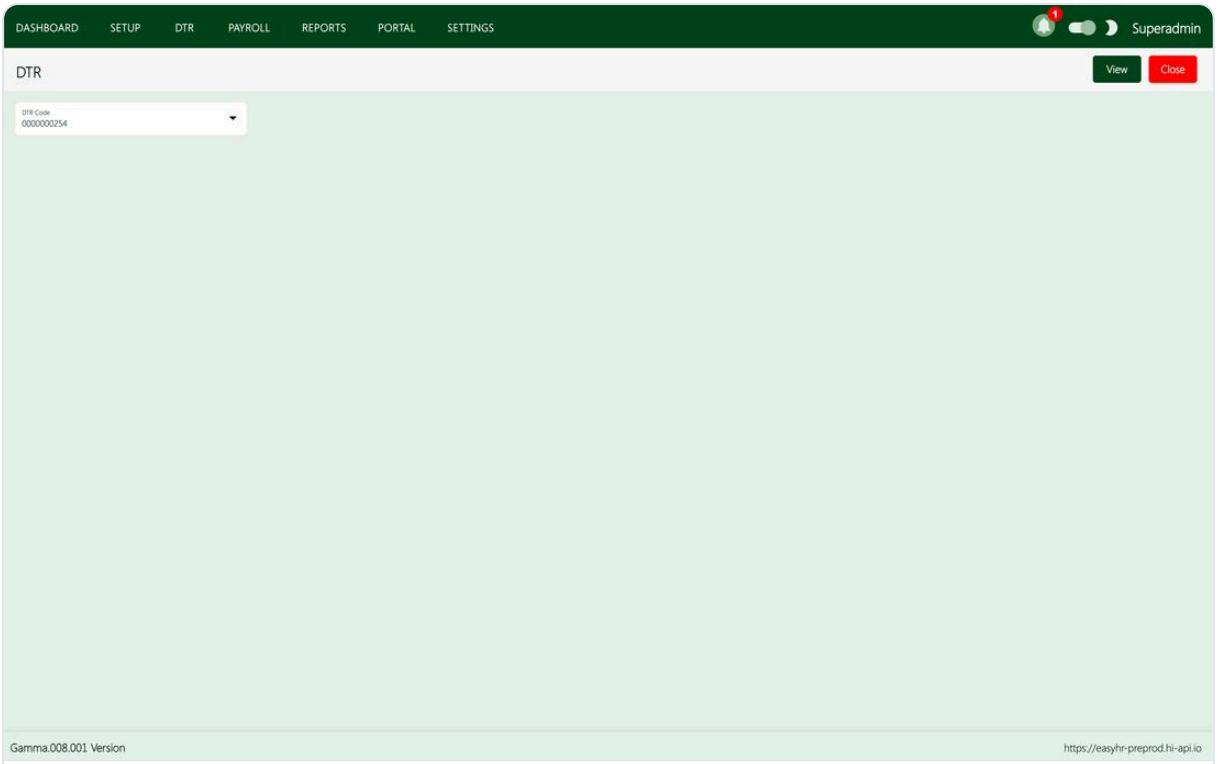
The list of accounts and amounts to be sent to the bank.

## 5.12 DTR Report

The attendance behind a pay period: hours worked, late, undertime, absences, overtime and night differential, per employee and per day.

#### HOW TO GET THERE

**REPORTS → DTR Report** `/software/dtr-report`




DTR Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → DTR Report**.
2. Set the selection at the top of the screen: **DTR Code**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

DTR Code

#### BUTTONS

View Close

#### WHAT YOU SHOULD SEE

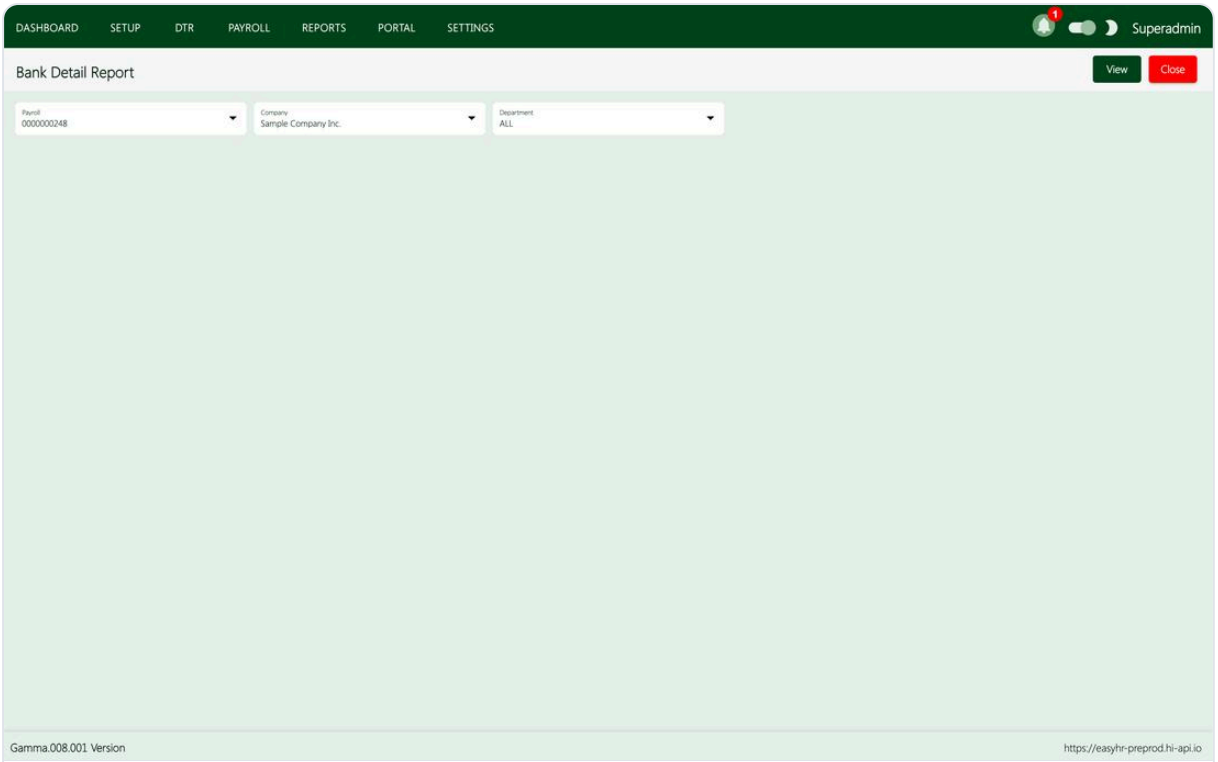
The daily time record for the chosen employees and period.

### 5.13 Bank Detail Report

The bank details held on the employee records — bank, branch and account number — so they can be checked before a payroll is sent to the bank.

#### HOW TO GET THERE

**REPORTS → Bank Detail Report** `/software/bank-detail-report`




Bank Detail Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Bank Detail Report**.
2. Set the selection at the top of the screen: **Payroll**, **Company**, **Department**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Payroll · Company · Department

#### BUTTONS

View · Close

#### WHAT YOU SHOULD SEE

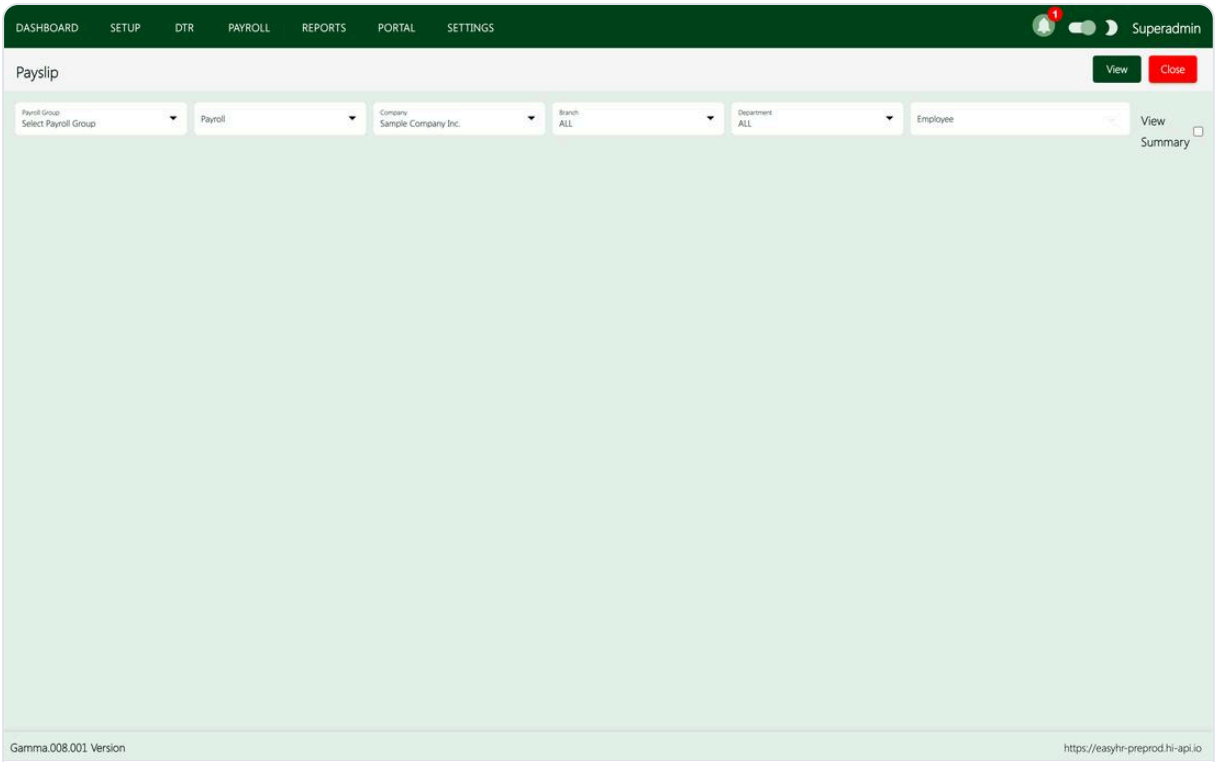
One line per employee with their bank account details.

### 5.14 Payslip Report

The payslips for a pay period, ready to print or to send. Each payslip shows the employee's earnings, deductions and net pay, and what appears on it is governed by the payslip settings on the company record.

#### HOW TO GET THERE

**REPORTS → Payslip Report** `/software/payslip-report`




Payslip Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Payslip Report**.
2. Set the selection at the top of the screen: **Payroll Group**, **Payroll**, **Company**, **Branch**, **Department**, **Employee**, **View Summary**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Payroll Group · Payroll · Company · Branch · Department · Employee · View Summary

#### BUTTONS

View · Close

#### WHAT YOU SHOULD SEE

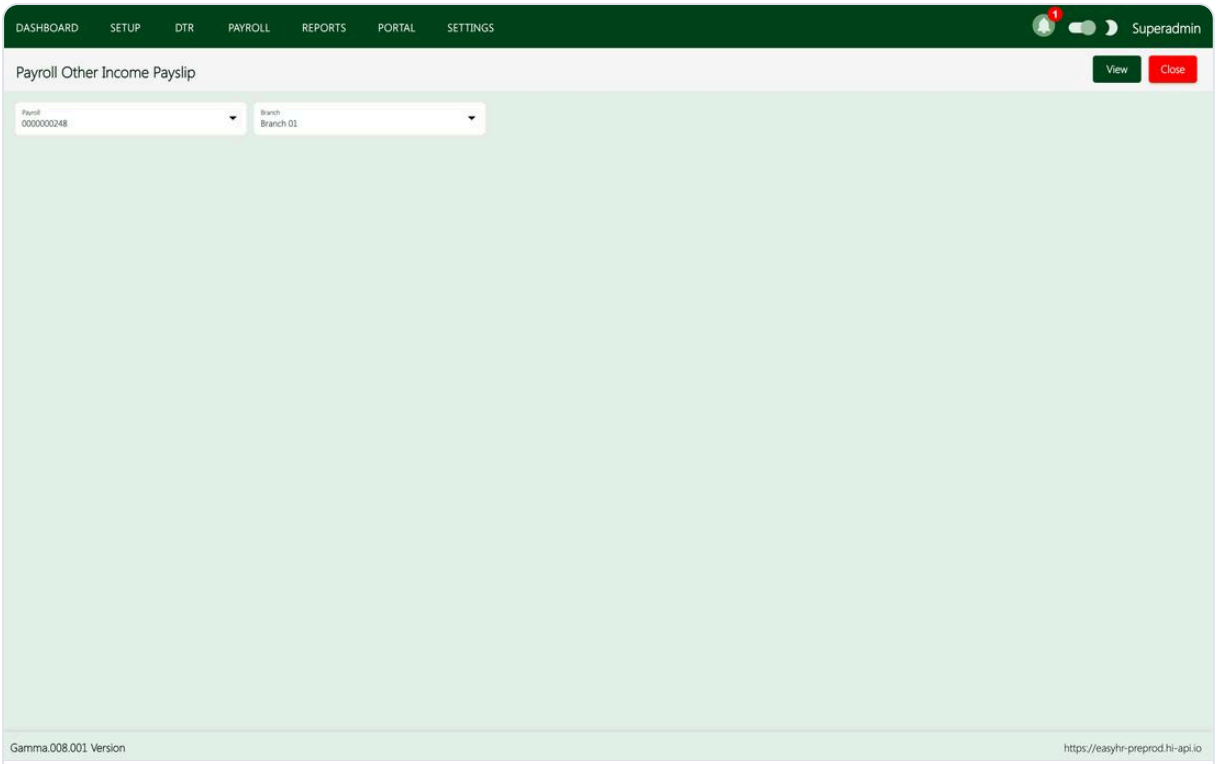
One payslip per employee for the chosen payroll.

### 5.15 Payroll Other Income Payslip

A payslip covering only the extra income paid — used when a bonus or an allowance is paid outside the regular pay run.

#### HOW TO GET THERE

**REPORTS → Payroll Other Income Payslip** `/software/payroll-other-income-payslip`




Payroll Other Income Payslip — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Payroll Other Income Payslip**.
2. Set the selection at the top of the screen: **Payroll**, **Branch**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Payroll · Branch

#### BUTTONS

View · Close

#### WHAT YOU SHOULD SEE

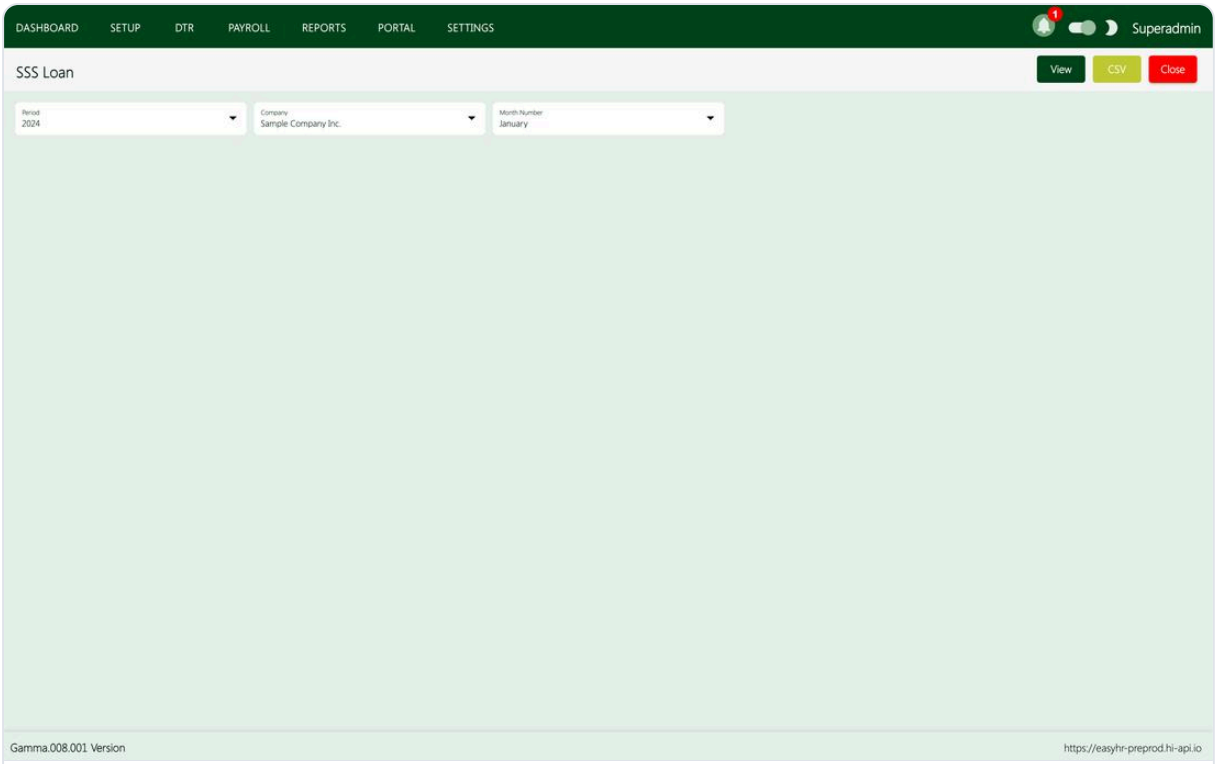
One payslip per employee showing the other-income amounts.

### 5.16 SSS Loan

The SSS salary loan deductions for a period, in the form SSS expects for remittance.

#### HOW TO GET THERE

**REPORTS → SSS Loan** `/software/report-sss-loan`




SSS Loan — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → SSS Loan**.
2. Set the selection at the top of the screen: **Period**, **Company**, **Month Number**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **CSV** instead to download the same figures as a spreadsheet file.
5. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Period · Company · Month Number

#### BUTTONS

View · CSV · Close

#### WHAT YOU SHOULD SEE

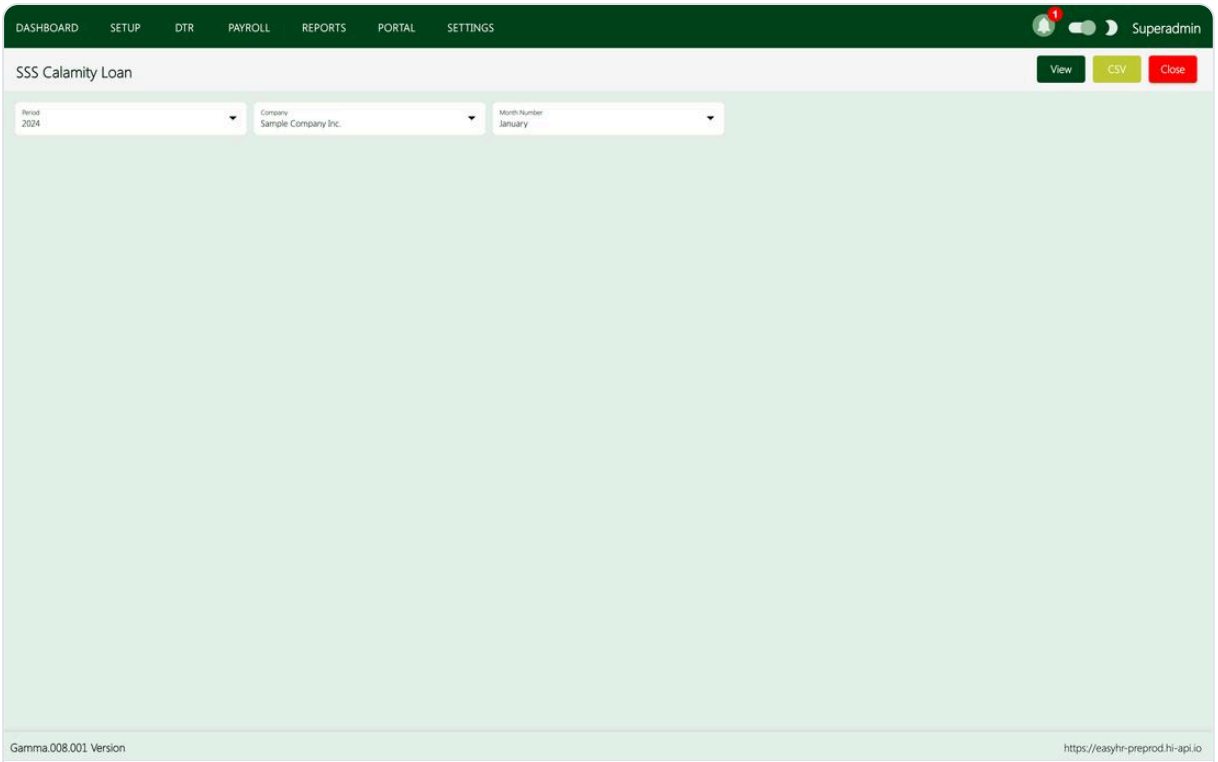
The loan deduction per employee and the total to be remitted to SSS.

## 5.17 SSS Calamity Loan

The same as the SSS loan report, for calamity loans, which SSS accounts for separately.

#### HOW TO GET THERE

**REPORTS → SSS Calamity Loan** `/software/report-sss-calamity-loan`




SSS Calamity Loan — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → SSS Calamity Loan**.
2. Set the selection at the top of the screen: **Period**, **Company**, **Month Number**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **CSV** instead to download the same figures as a spreadsheet file.
5. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Period · Company · Month Number

#### BUTTONS

View · CSV · Close

#### WHAT YOU SHOULD SEE

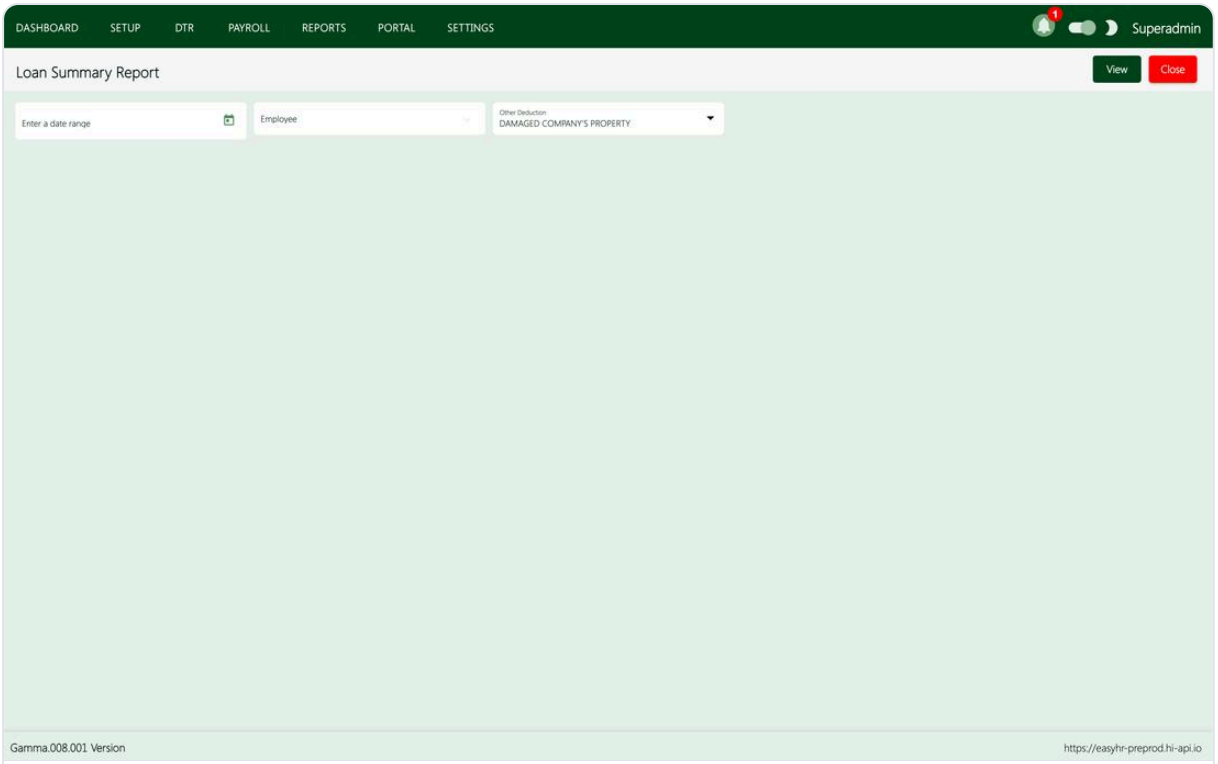
The calamity loan deduction per employee and the total to be remitted.

## 5.18 Loan Summary Report

Every loan on file with its principal, what has been paid and what is still outstanding — the report to use when an employee asks how much is left.

#### HOW TO GET THERE

**REPORTS → Loan Summary Report** `/software/loan-summary-report`




Loan Summary Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Loan Summary Report**.
2. Set the selection at the top of the screen: **Enter a date range**, **Employee**, **Other Deduction**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Enter a date range · Employee · Other Deduction

#### BUTTONS

View · Close

#### WHAT YOU SHOULD SEE

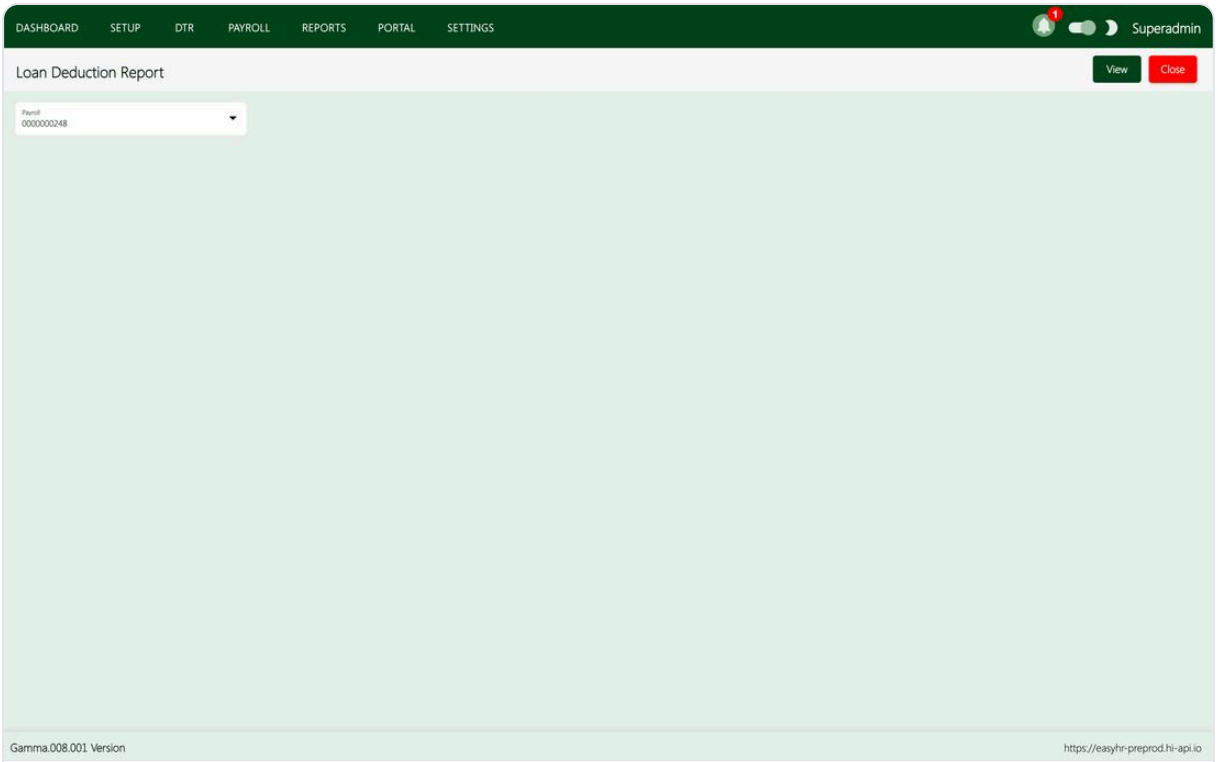
One line per loan with the running balance.

## 5.19 Loan Deduction Report

The loan instalments actually deducted in a period, by employee and loan type.

#### HOW TO GET THERE

**REPORTS → Loan Deduction Report** `/software/loan-deduction-report`




Loan Deduction Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Loan Deduction Report**.
2. Set the selection at the top of the screen: **Payroll**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Payroll

#### BUTTONS

View Close

#### WHAT YOU SHOULD SEE

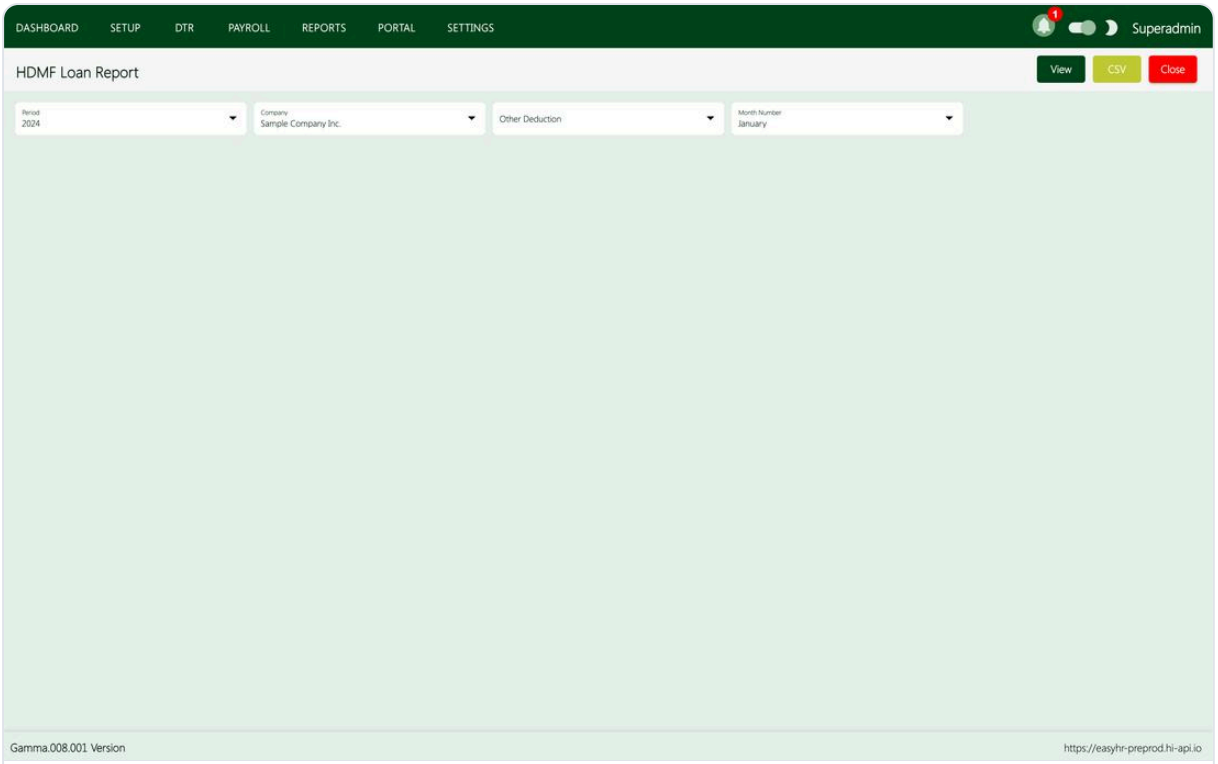
One line per employee and loan, with the amount deducted.

### 5.20 HDMF Loan Report

The Pag-IBIG (HDMF) loan deductions for a period, in the form HDMF expects.

#### HOW TO GET THERE

**REPORTS → HDMF Loan Report** `/software/hdmf-loan-report`




HDMF Loan Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → HDMF Loan Report**.
2. Set the selection at the top of the screen: **Period**, **Company**, **Other Deduction**, **Month Number**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **CSV** instead to download the same figures as a spreadsheet file.
5. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Period · Company · Other Deduction · Month Number

#### BUTTONS

View · CSV · Close

#### WHAT YOU SHOULD SEE

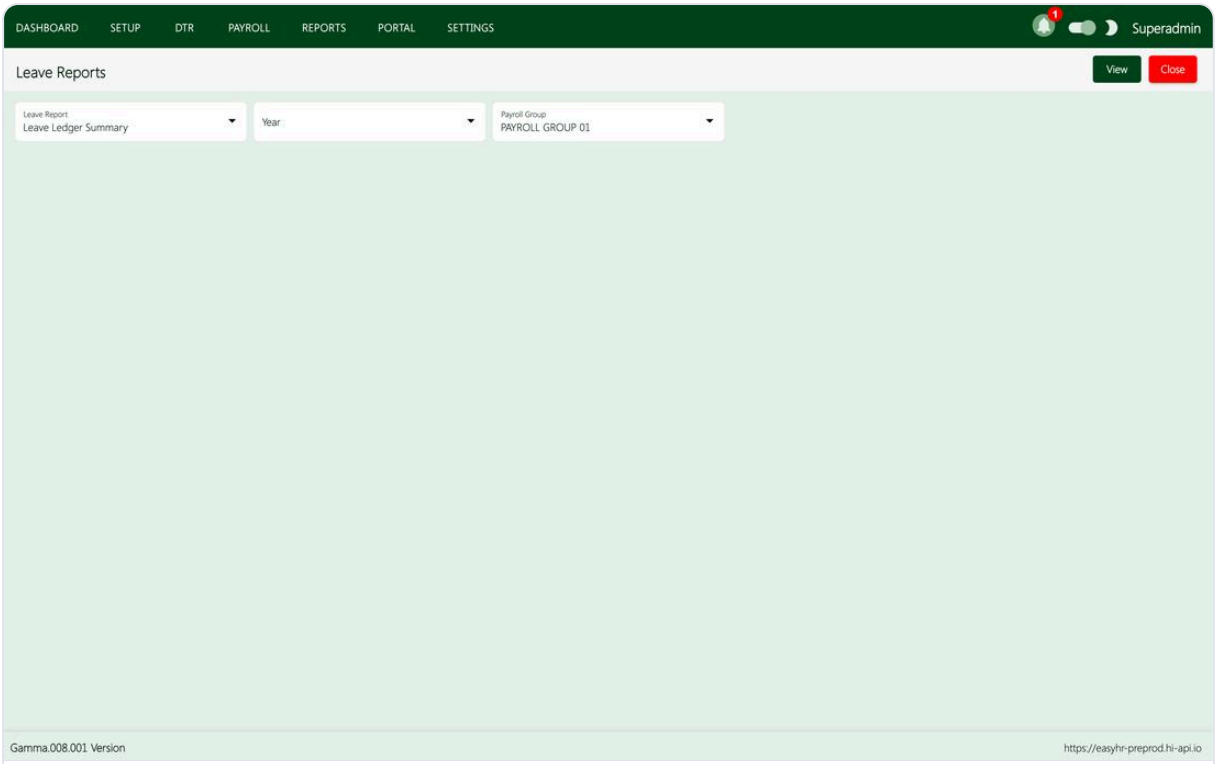
The loan deduction per employee and the total to be remitted to HDMF.

## 5.21 Leave Report

Leave taken and leave remaining, per employee and leave type.

#### HOW TO GET THERE

**REPORTS → Leave Report** `/software/leave-reports`




Leave Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Leave Report**.
2. Set the selection at the top of the screen: **Leave Report**, **Year**, **Payroll Group**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Leave Report · Year · Payroll Group

#### BUTTONS

View · Close

#### WHAT YOU SHOULD SEE

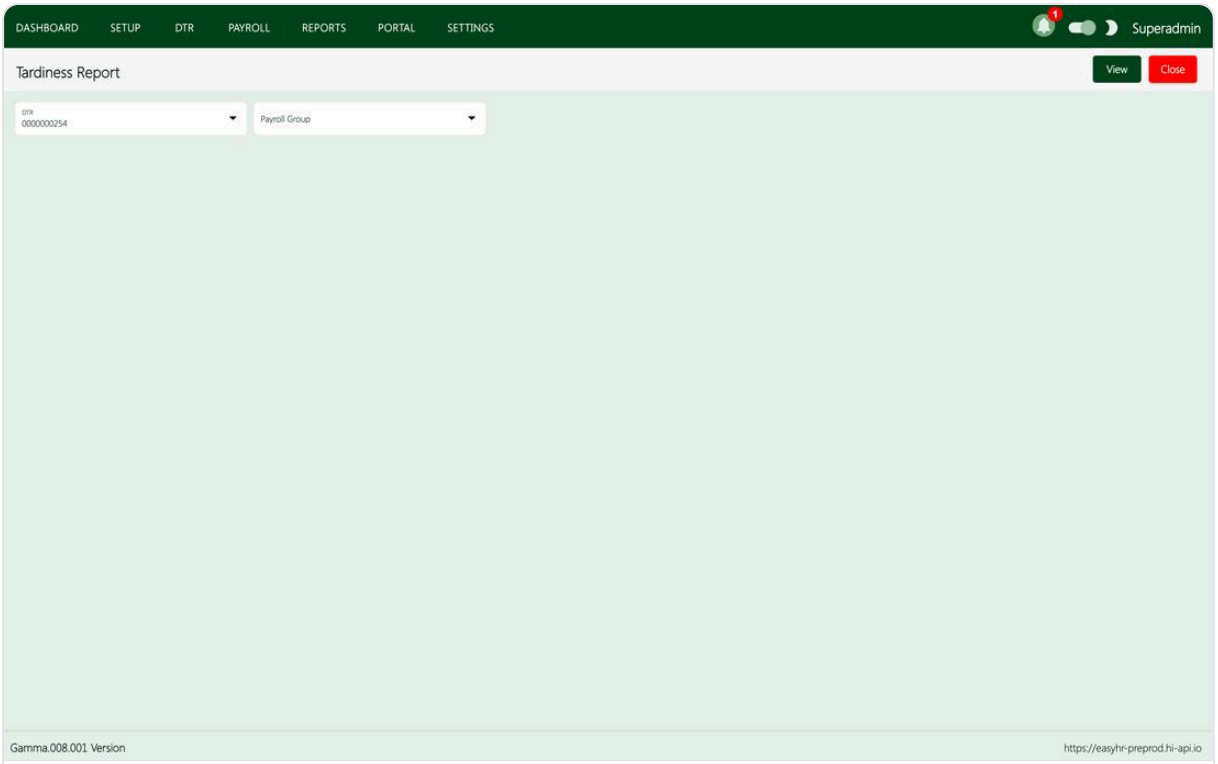
Leave credits granted, used and remaining for the chosen period.

## 5.22 Tardiness Report

Who arrived late, on which days and by how much.

#### HOW TO GET THERE

**REPORTS → Tardiness Report** `/software/tardiness-reports`




Tardiness Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Tardiness Report**.
2. Set the selection at the top of the screen: **DTR**, **Payroll Group**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

DTR · Payroll Group

#### BUTTONS

View · Close

#### WHAT YOU SHOULD SEE

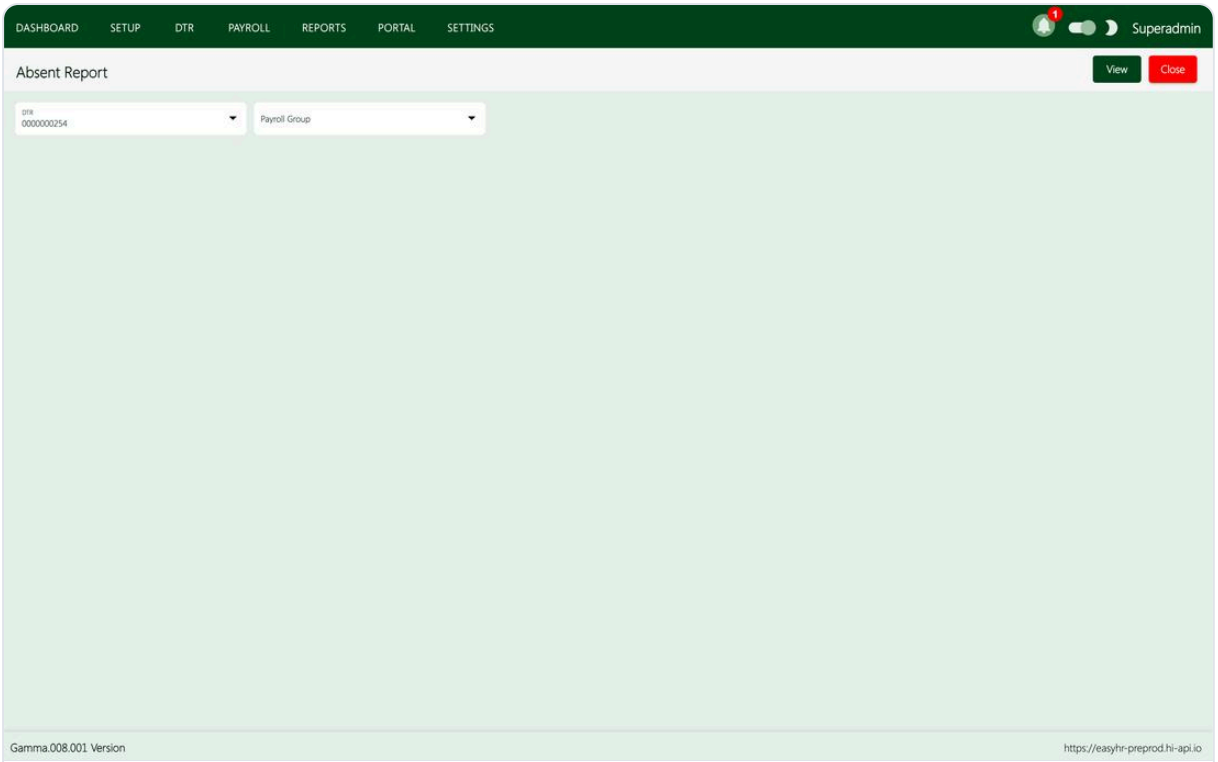
One line per late instance, with totals per employee.

## 5.23 Absent Report

Absences in a period, per employee and per day.

#### HOW TO GET THERE

**REPORTS → Absent Report** `/software/absent-reports`




Absent Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Absent Report**.
2. Set the selection at the top of the screen: **DTR**, **Payroll Group**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

DTR · Payroll Group

#### BUTTONS

View · Close

#### WHAT YOU SHOULD SEE

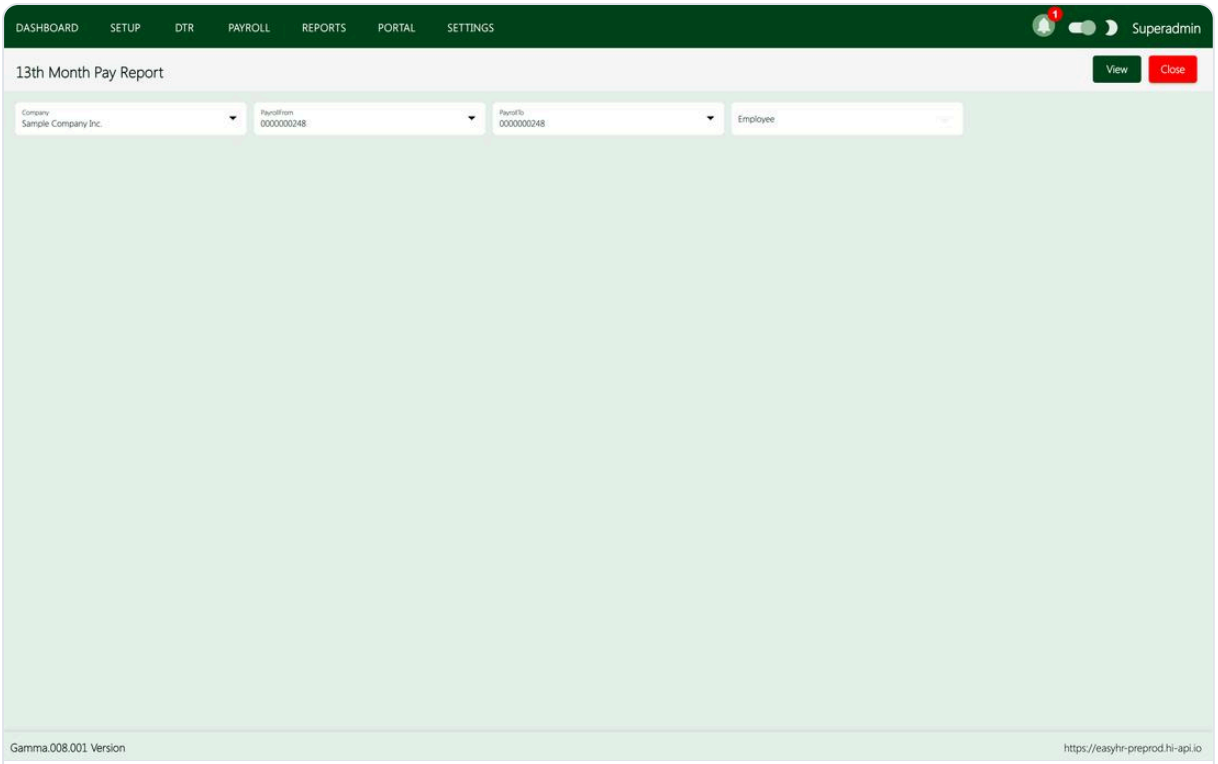
One line per absence, with totals per employee.

## 5.24 13th Month Pay Report

The 13th month pay due to each employee: the basic pay that counts towards it, the months of service, and the amount. Which kinds of pay are included is set on the company record.

#### HOW TO GET THERE

**REPORTS → 13th Month Pay Report** `/software/13th-month-pay-report`




13th Month Pay Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → 13th Month Pay Report**.
2. Set the selection at the top of the screen: **Company**, **PayrollFrom**, **PayrollTo**, **Employee**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Company | PayrollFrom | PayrollTo | Employee

#### BUTTONS

View | Close

#### WHAT YOU SHOULD SEE

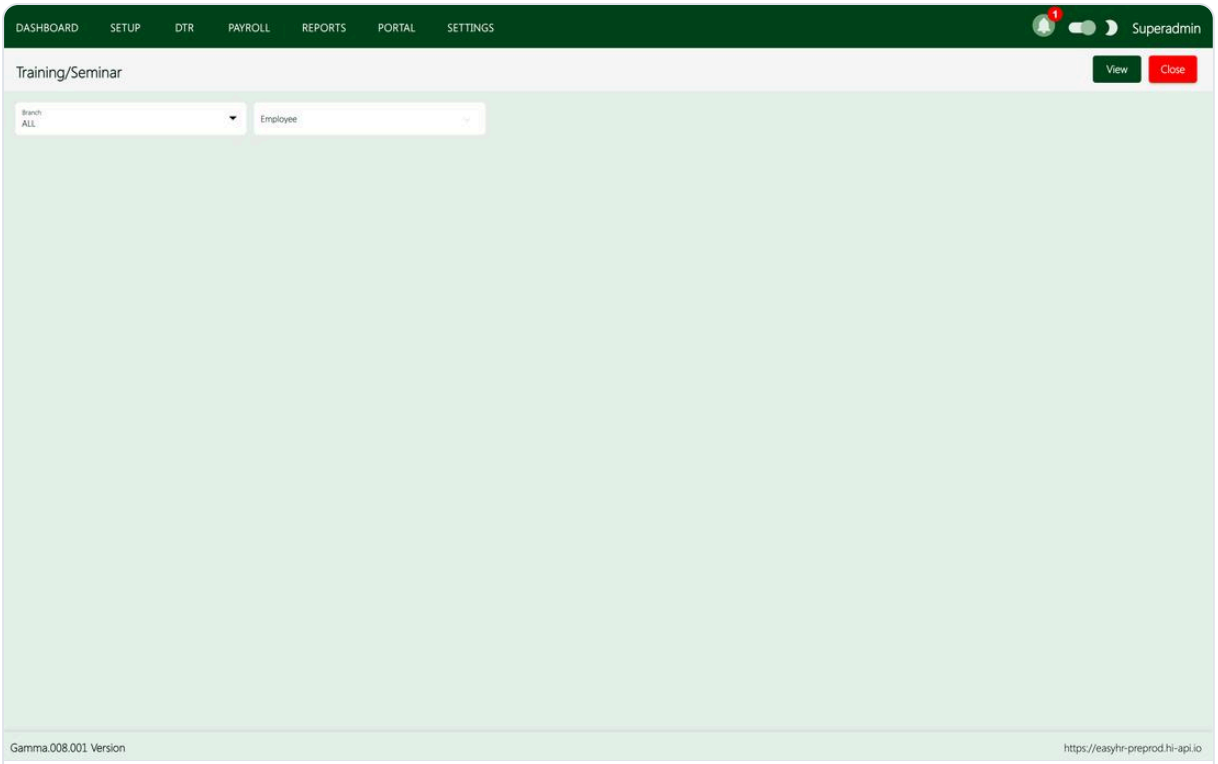
The 13th month entitlement per employee for the year.

### 5.25 Training Report

The training and seminars recorded on the employee records, so that attendance can be reviewed across the workforce.

#### HOW TO GET THERE

**REPORTS → Training Report** `/software/training-report`




Training Report — the screen as it opens

### WHAT TO DO

1. Open **REPORTS → Training Report**.
2. Set the selection at the top of the screen: **Branch**, **Employee**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

### FIELDS ON THIS SCREEN

Branch · Employee

### BUTTONS

View · Close

### WHAT YOU SHOULD SEE

One line per employee and training event.

# 6. Employee Portal

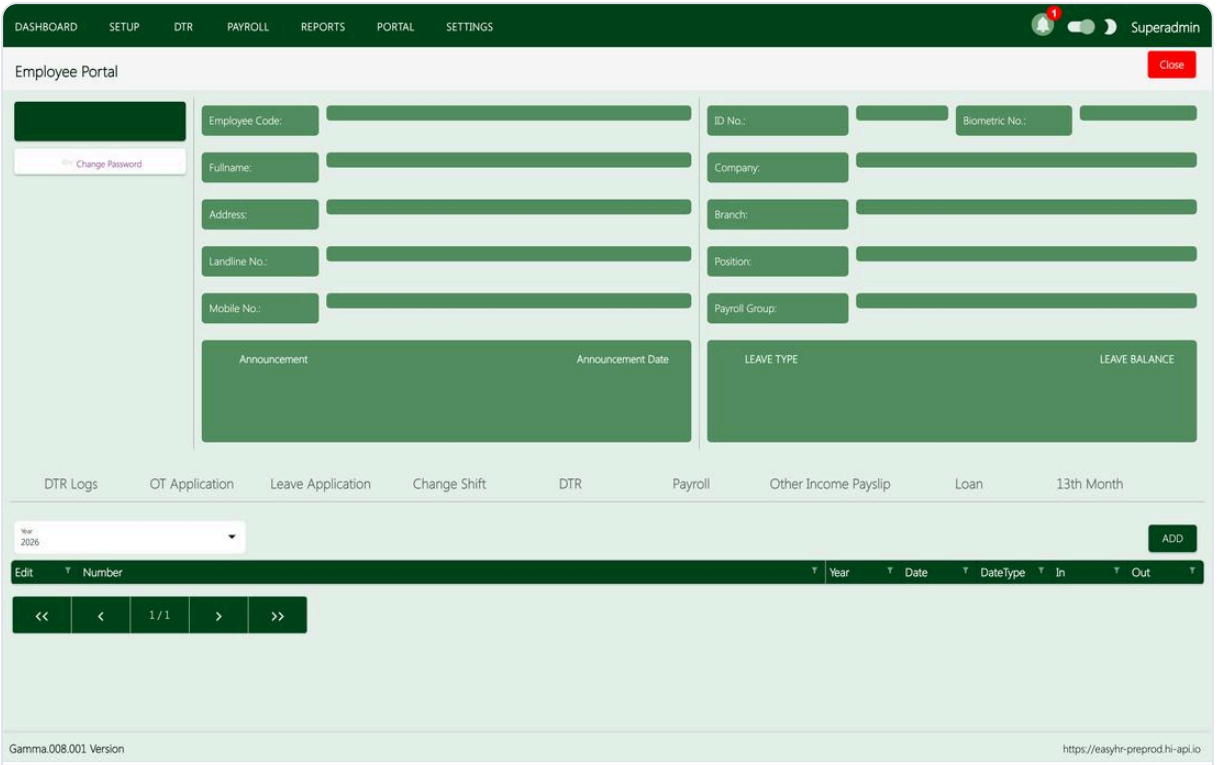
What an employee sees when they sign in to easyHR themselves.

## 6.1 Employee Portal

The employee portal is what an employee sees when they sign in with their own account. It is self-service: employees look up their own attendance, payslips, loan balances and 13th month, and file change shift, leave and overtime applications that appear straight away on the approver's screen.

### HOW TO GET THERE

**PORTAL → Employee Portal** `/software/portal-employee`




Employee Portal — the screen as it opens

### WHAT TO DO

1. The employee signs in with their own user name and password.
2. The portal opens on their own record — there is nothing else they can reach.
3. **DTR logs** shows their attendance; **Payroll** and **Other Income Payslip** show their payslips; **Loan** shows their balances; **13th Month** shows their entitlement.
4. **OT Application**, **Leave Application** and **Change Shift** let them file an application.

### COLUMNS ON THIS SCREEN

Edit | Number | Year | Date | DateType | In | Out

### FILTERS

Year

### BUTTONS

Close | vpn_keyChange Password | ADD

### OT APPLICATION

> This tab is the one already open in the figure above; its columns are listed below.

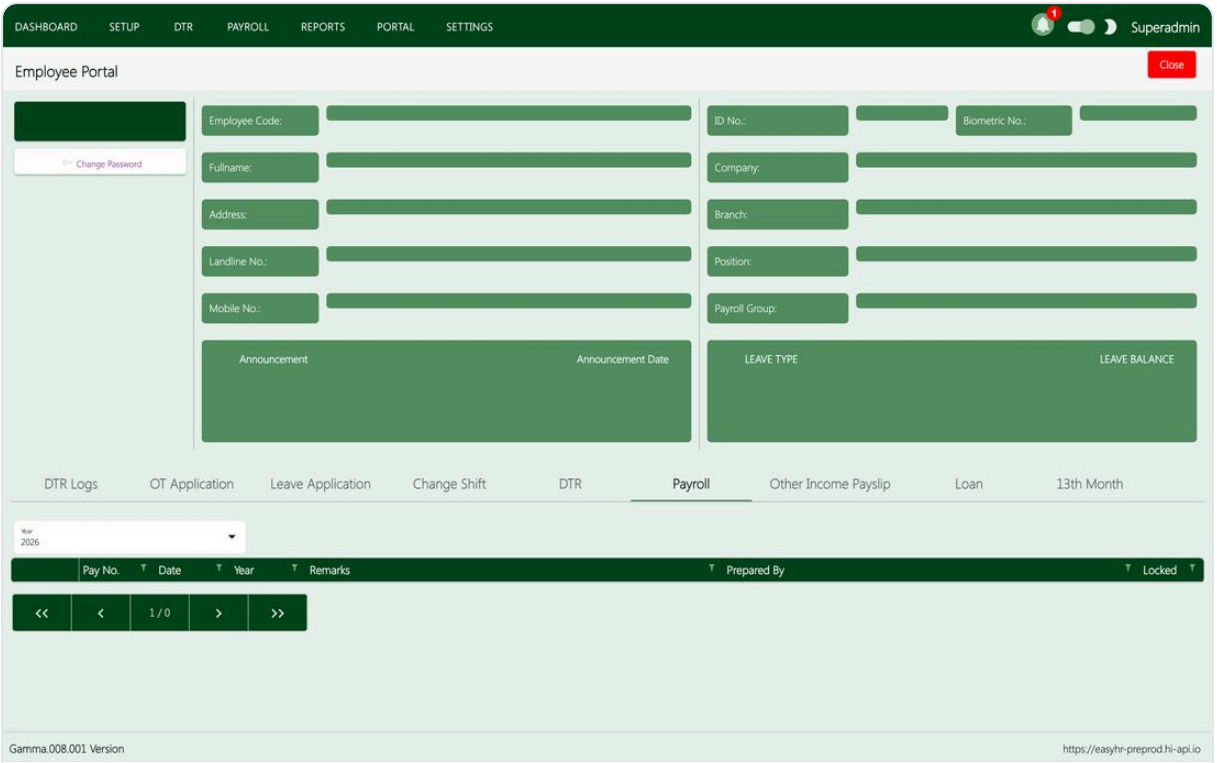
**Columns:** Edit | Delete | Number | Year | Date | Hours | Approved | ConvertedToLeaveCredit | Remarks

### LEAVE APPLICATION

> This tab is the one already open in the figure above; its columns are listed below.

**Columns:** Edit | Delete | Number | Year | Date | Leave Type | Half Day | With Pay | Approved | Remarks

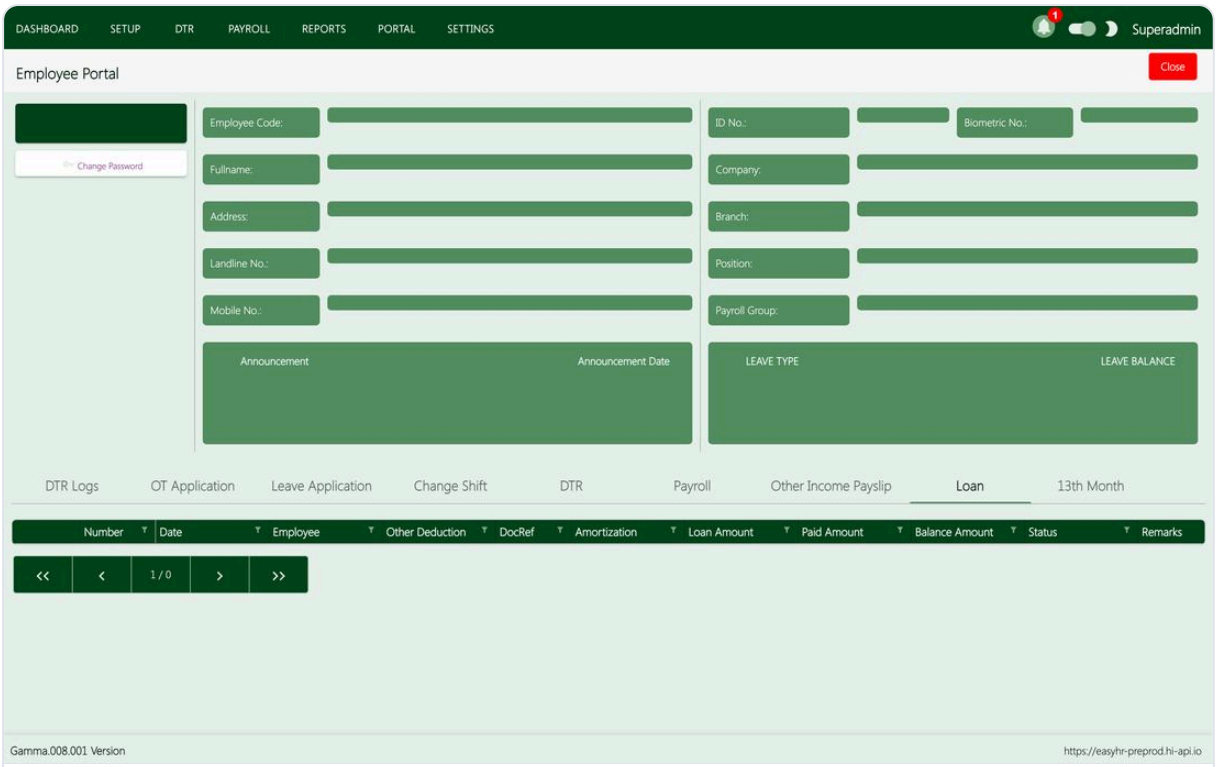
### PAYROLL




Employee Portal — the employee's own payslips

**Columns:** Pay No. | Date | Year | Remarks | Prepared By | Locked

### LOAN




Employee Portal — the employee's own loan balances

**Columns:** Number · Date · Employee · Other Deduction · DocRef · Amortization · Loan Amount · Paid Amount · Balance Amount · Status · Remarks

#### WHAT YOU SHOULD SEE

An application filed here appears on the matching DTR screen for the approver, with no further step.

#### WORTH KNOWING

> An employee only sees the portal if their employee record has been tied to a user account with **Link Username**.

> An administrator opening this screen sees the portal view; it is the same screen the employee gets.

# 7. Settings

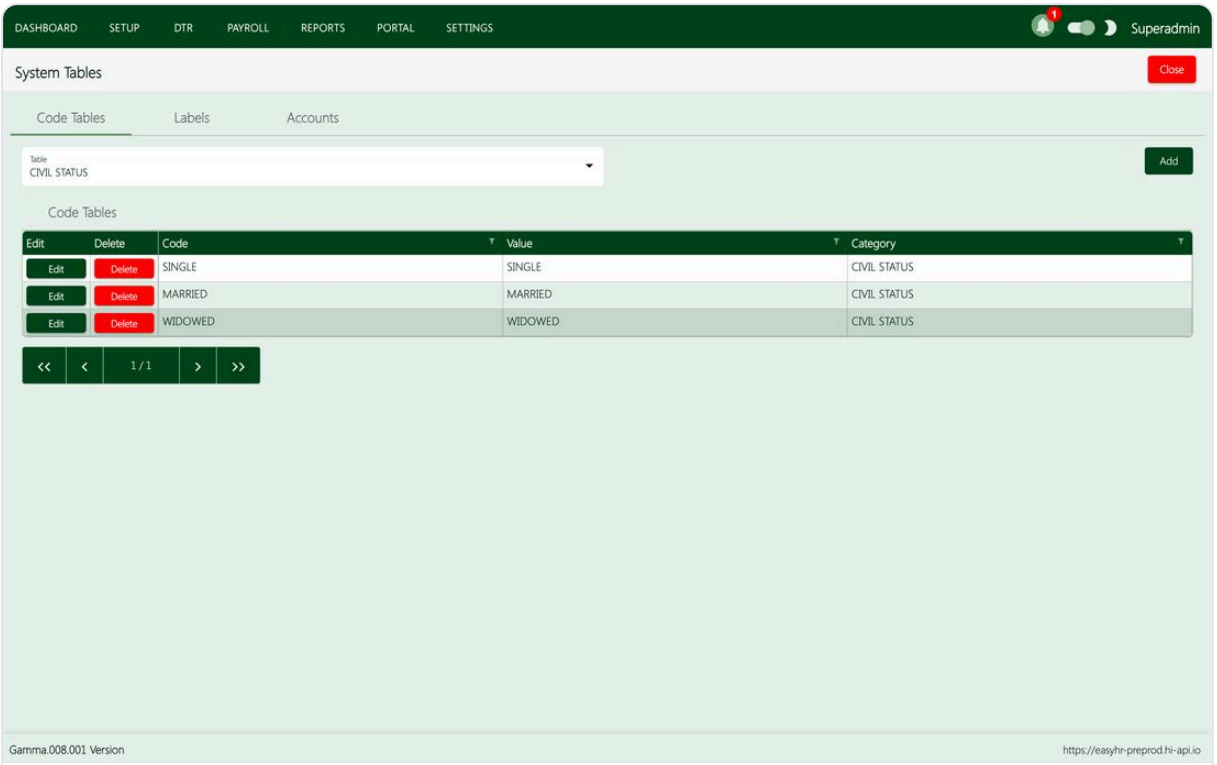
System-wide configuration, the record of who changed what, and the link to other Human Incubator products.

## 7.1 System Tables

The look-up lists the rest of the system chooses from — the code tables such as departments, positions, banks and leave types; the labels that let a company rename what the screens say; and the accounting accounts used when the payroll is turned into a journal voucher.

### HOW TO GET THERE

**SETTINGS → System Tables** `/software/system-tables-list`




System Tables — the screen as it opens

### WHAT TO DO

1. Open **SETTINGS → System Tables**.
2. Choose the tab — **Code Tables**, **Labels** or **Accounts**.
3. Click **Add** for a new entry, or **Edit** an existing one.
4. Click **Save**.

### COLUMNS ON THIS SCREEN

Edit · Delete · Code · Value · Category

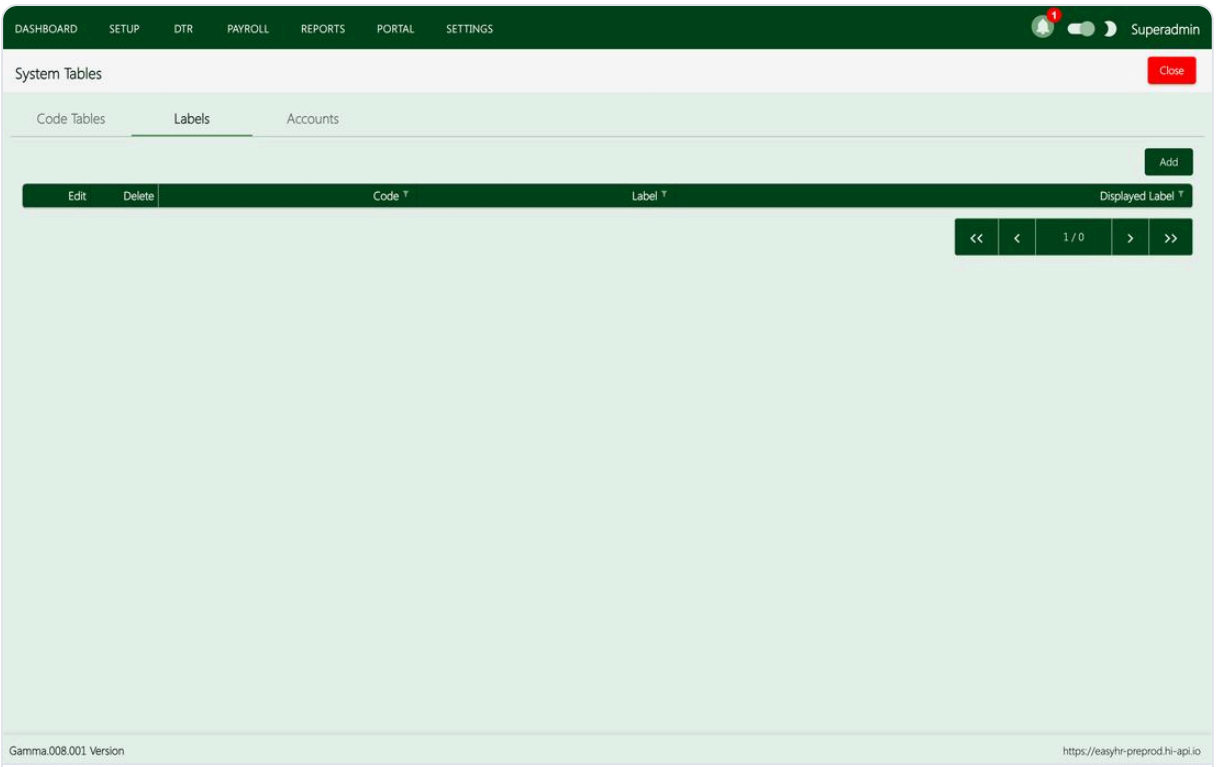
### FILTERS

Table

### BUTTONS

Close · Add · Edit · Delete

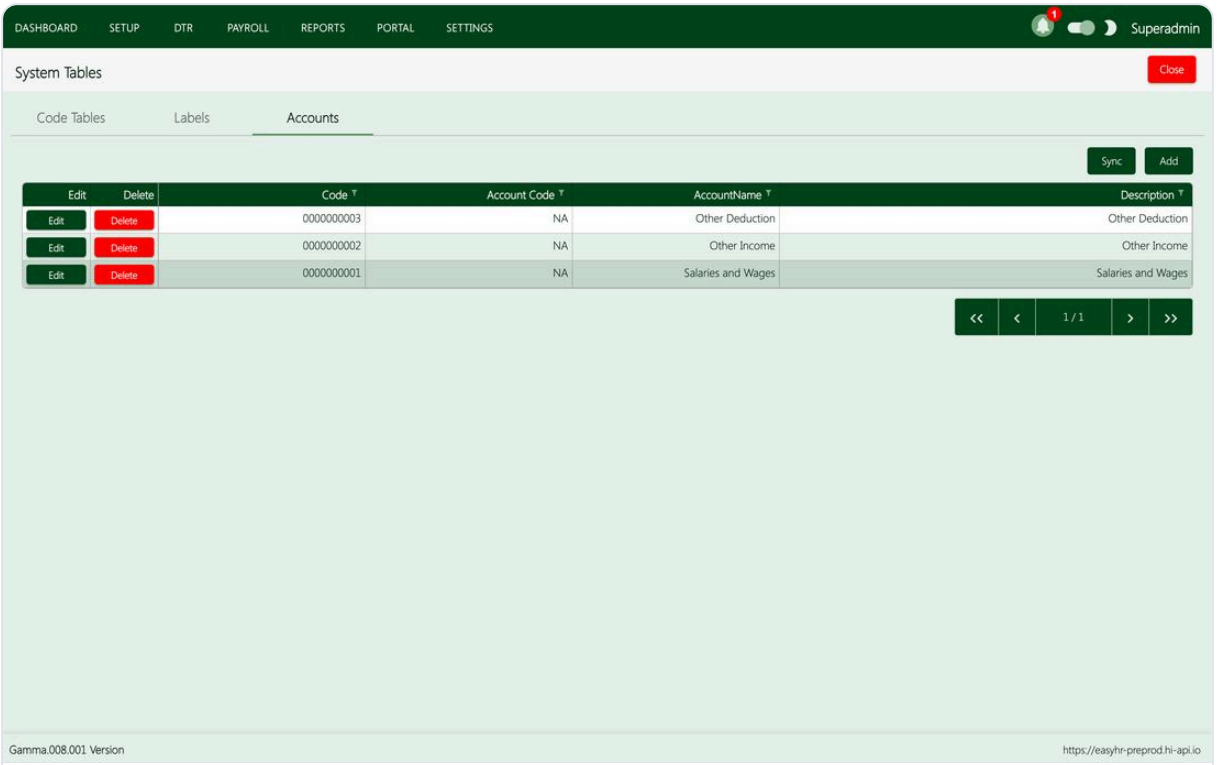
### LABELS




System Tables — Labels

**Columns:** Edit Delete Code Label Displayed Label

### ACCOUNTS




System Tables — Accounts

**Columns:** Edit Delete Code Account Code AccountName Description

### WHAT YOU SHOULD SEE

The new entry appears in the drop-downs that read that table.

WORTH KNOWING

**Do not use special characters** in these entries; only `+` and `-` are safe.

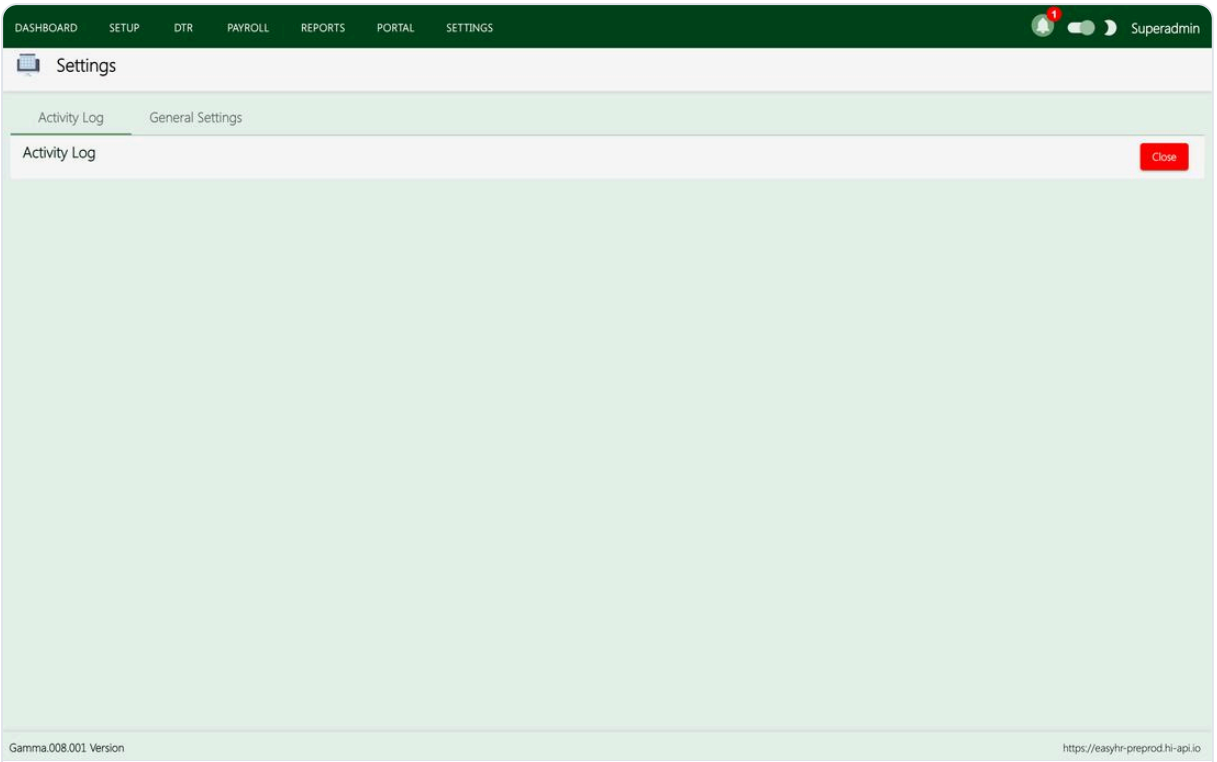
Removing a code that is already in use on employee records leaves those records pointing at nothing. Add a replacement first.

## 7.2 Settings

The Settings entry on the menu opens the activity log — a record of what has been done in the system, in order, with the account that did it.

HOW TO GET THERE

**SETTINGS → Settings** `/software/demo-activity-log`




Settings — the screen as it opens

WHAT TO DO

1. Open **SETTINGS → Settings**.
2. The **Activity Log** tab lists what has been done; the **General Settings** tab holds the system-wide options.

BUTTONS

Close

GENERAL SETTINGS

This tab is the one already open in the figure above; its columns are listed below.

**Fields:** Employee Limit

WHAT YOU SHOULD SEE

The activity log, most recent first, and the general settings on the second tab.

#### WORTH KNOWING

> This screen is read-only.

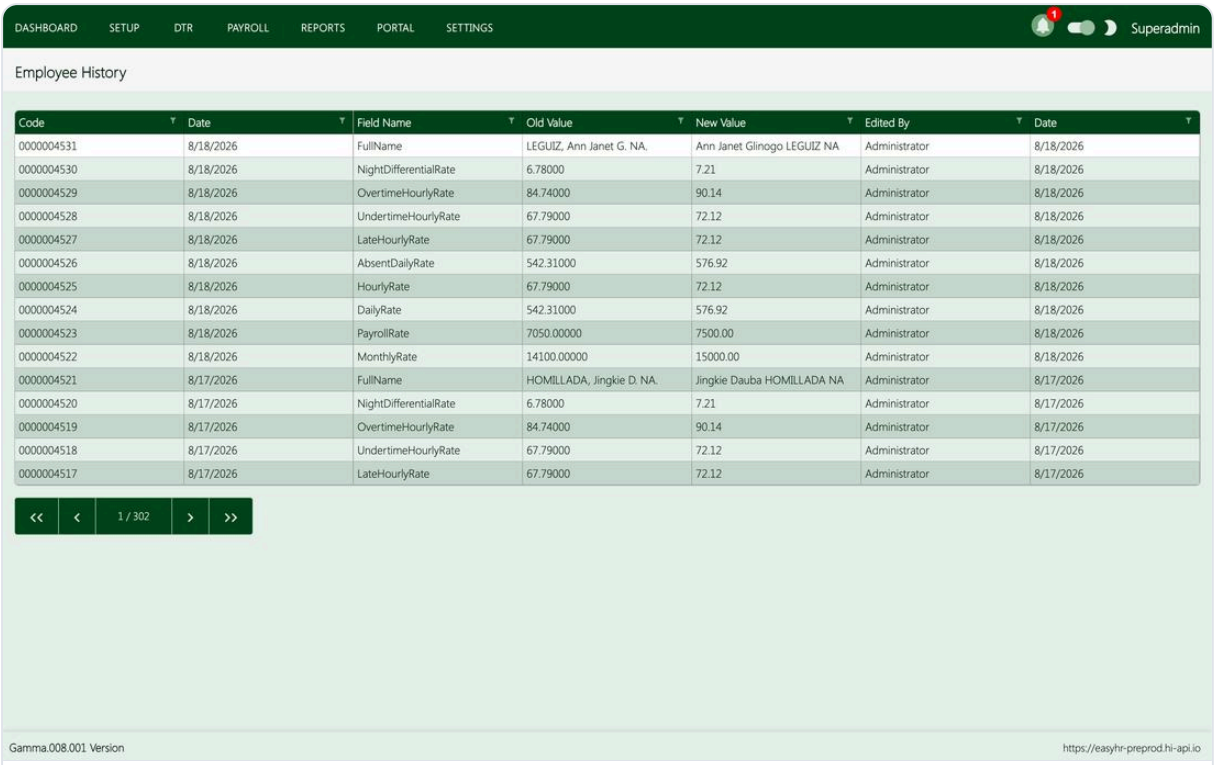
> In the system this manual was written from the Activity Log tab is empty; the General Settings tab is populated.

## 7.3 Employee History

The record of changes made to employee 201 files: what was changed, when, and by which user. It is the first place to look when an employee's details are not what somebody expected.

#### HOW TO GET THERE

**SETTINGS → Employee History** `/software/employee-history`




| Code | Date | Field Name | Old Value | New Value | Edited By | Date |
|---|---|---|---|---|---|---|
| 0000004531 | 8/18/2026 | FullName | LEGUIZ, Ann Janet G. NA. | Ann Janet Glinogo LEGUIZ NA | Administrator | 8/18/2026 |
| 0000004530 | 8/18/2026 | NightDifferentialRate | 6.78000 | 7.21 | Administrator | 8/18/2026 |
| 0000004529 | 8/18/2026 | OvertimeHourlyRate | 84.74000 | 90.14 | Administrator | 8/18/2026 |
| 0000004528 | 8/18/2026 | UndertimeHourlyRate | 67.79000 | 72.12 | Administrator | 8/18/2026 |
| 0000004527 | 8/18/2026 | LateHourlyRate | 67.79000 | 72.12 | Administrator | 8/18/2026 |
| 0000004526 | 8/18/2026 | AbsentDailyRate | 542.31000 | 576.92 | Administrator | 8/18/2026 |
| 0000004525 | 8/18/2026 | HourlyRate | 67.79000 | 72.12 | Administrator | 8/18/2026 |
| 0000004524 | 8/18/2026 | DailyRate | 542.31000 | 576.92 | Administrator | 8/18/2026 |
| 0000004523 | 8/18/2026 | PayrollRate | 7050.00000 | 7500.00 | Administrator | 8/18/2026 |
| 0000004522 | 8/18/2026 | MonthlyRate | 14100.00000 | 15000.00 | Administrator | 8/18/2026 |
| 0000004521 | 8/17/2026 | FullName | HOMILLADA, Jingkie D. NA. | Jingkie Dauba HOMILLADA NA | Administrator | 8/17/2026 |
| 0000004520 | 8/17/2026 | NightDifferentialRate | 6.78000 | 7.21 | Administrator | 8/17/2026 |
| 0000004519 | 8/17/2026 | OvertimeHourlyRate | 84.74000 | 90.14 | Administrator | 8/17/2026 |
| 0000004518 | 8/17/2026 | UndertimeHourlyRate | 67.79000 | 72.12 | Administrator | 8/17/2026 |
| 0000004517 | 8/17/2026 | LateHourlyRate | 67.79000 | 72.12 | Administrator | 8/17/2026 |

Employee History — the screen as it opens

#### WHAT TO DO

1. Open **SETTINGS → Employee History**.
2. Filter by employee or by date to narrow the list.

#### COLUMNS ON THIS SCREEN

Code | Date | Field Name | Old Value | New Value | Edited By

#### WHAT YOU SHOULD SEE

One line per change, with the old and new values and the user who made them.

#### WORTH KNOWING

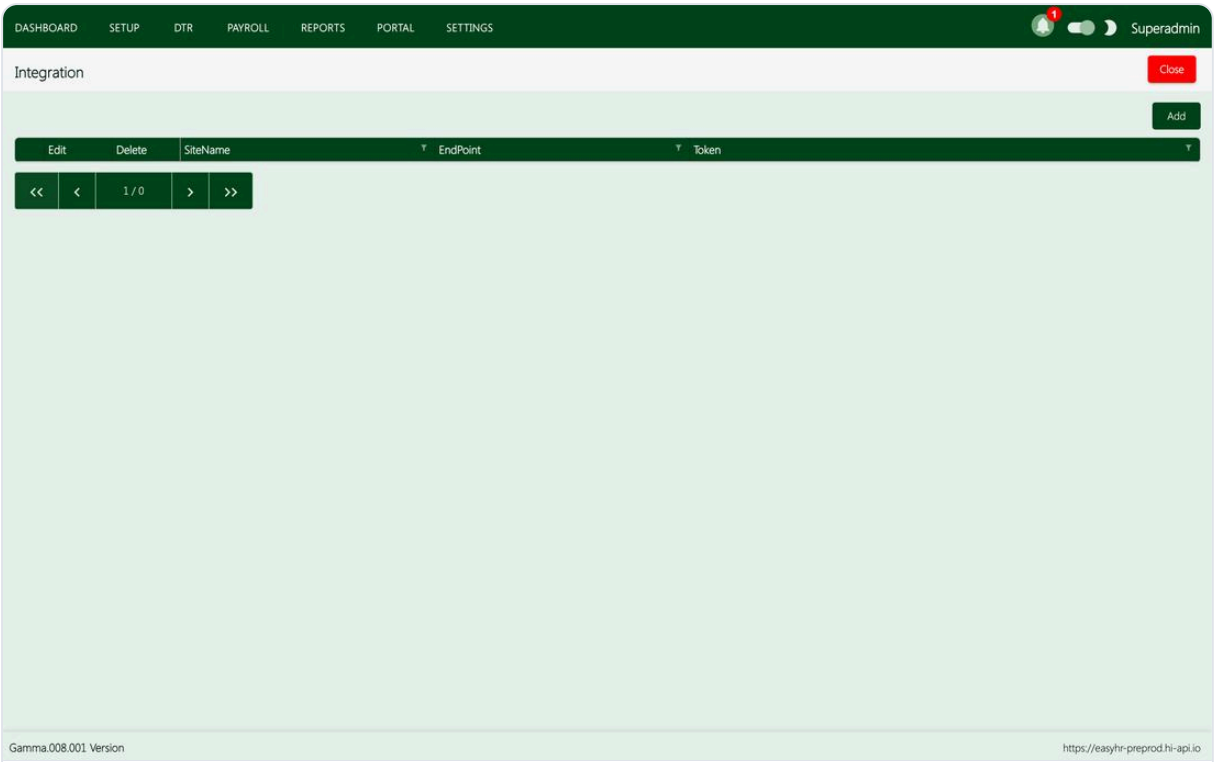
> The history is written automatically and cannot be edited.

## 7.4 System Integration

The link between easyHR and the other Human Incubator products — easyFS in particular — so that payroll can be posted to the accounting system without being re-typed.

### HOW TO GET THERE

**SETTINGS → System Integration** `/software/sys-integration`




System Integration — the screen as it opens

### WHAT TO DO

1. Open **SETTINGS → System Integration**.
2. Enter the connection details for the system to be linked and save them.

### COLUMNS ON THIS SCREEN

Edit | Delete | SiteName | EndPoint | Token

### BUTTONS

Close | Add

### WHAT YOU SHOULD SEE

Payroll journal entries can be passed to the linked system.

### WORTH KNOWING

> Integration settings are normally configured once, by the administrator, with Human Incubator's help. Changing them stops the transfer until they are corrected.

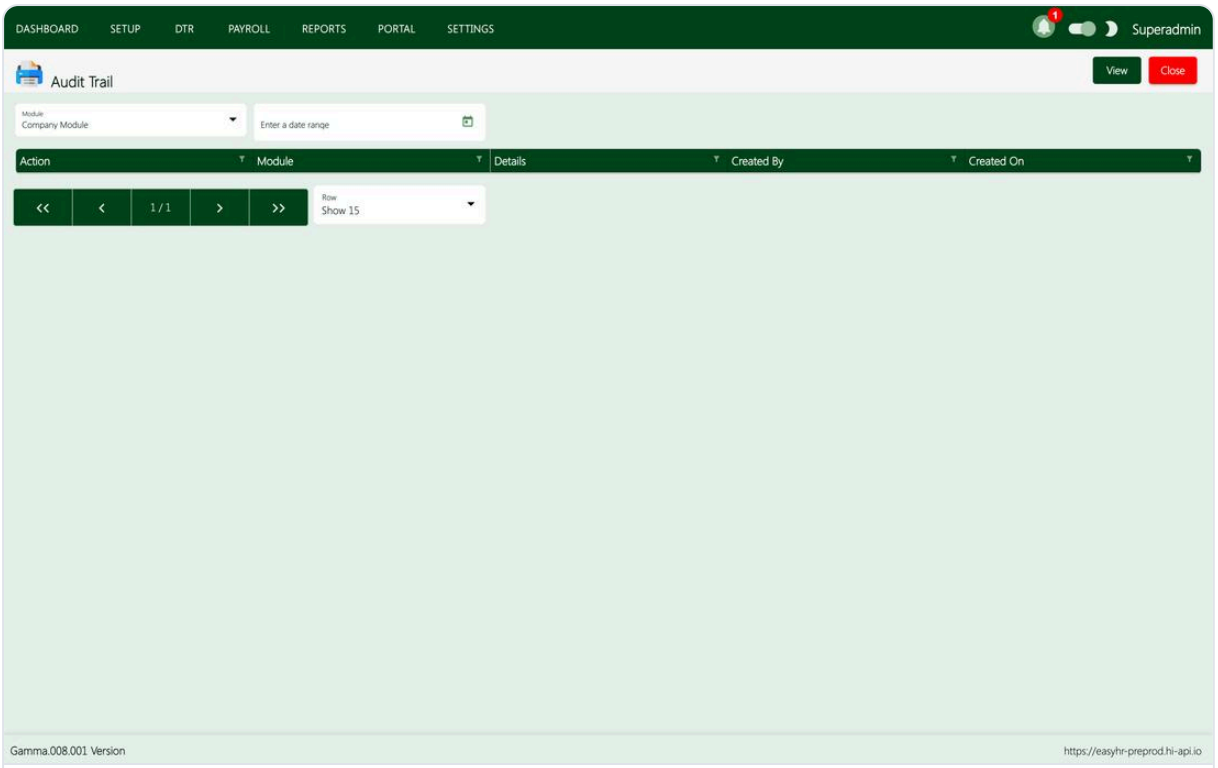
## 7.5 Audit Trail

The audit trail of sign-ins and of what each account did. It answers who was in the system, when, and from where.

### HOW TO GET THERE

## SETTINGS → Audit Trail `/software/user-logs-list`

> The menu entry for this screen is not shown in the demonstration environment. Whether it appears for you depends on your company's configuration and on your user rights.




Audit Trail — the screen as it opens

### WHAT TO DO

1. Open **SETTINGS** → **Audit Trail**, where the menu shows it.

### COLUMNS ON THIS SCREEN

Action | Module | Details | Created By | Created On

### FILTERS

Module | Enter a date range

### BUTTONS

View | Close

### WHAT YOU SHOULD SEE

One line per logged action, newest first.

### WORTH KNOWING

> This screen is not shown on the menu in the demonstration environment.

> The log is written by the system and cannot be edited or cleared from the screen.

# 8. Additional screens

Screens that exist in this build and can be opened, but that the menu does not show in the demonstration environment. They are documented here so that the manual is complete; whether they appear for you depends on how your company is configured and on your user rights.

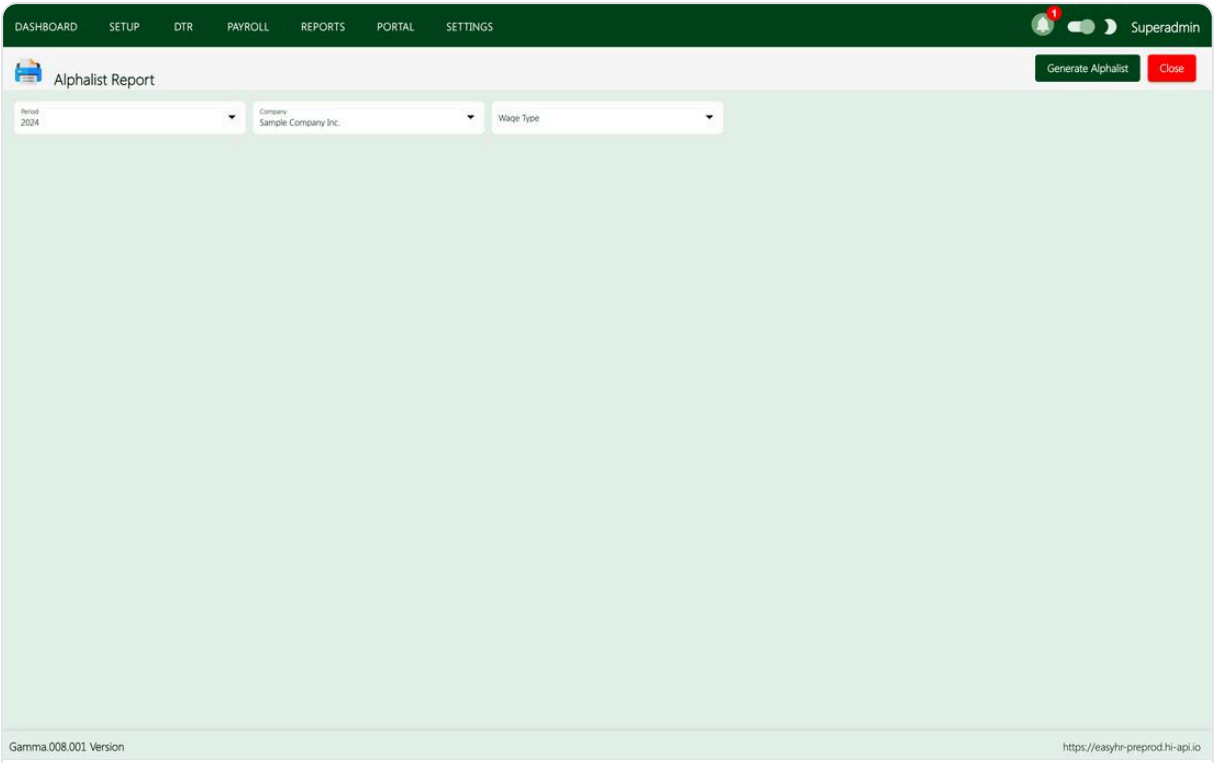
## 8.1 Alphalist

The BIR alphabetical list of employees: annual compensation, tax withheld and the details the Bureau of Internal Revenue requires with the annual return.

### HOW TO GET THERE

**REPORTS → Alphalist** `/software/alphalist-report`

> The menu entry for this screen is not shown in the demonstration environment. Whether it appears for you depends on your company's configuration and on your user rights.




Alphalist — the screen as it opens

### WHAT TO DO

1. Open **REPORTS → Alphalist**.
2. Set the selection at the top of the screen: **Period**, **Company**, **Wage Type**.
3. Click **Close** to leave the screen.

### FIELDS ON THIS SCREEN

Period · Company · Wage Type

### BUTTONS

Generate Alphalist · Close

#### WHAT YOU SHOULD SEE

The alphalist for the chosen tax year.

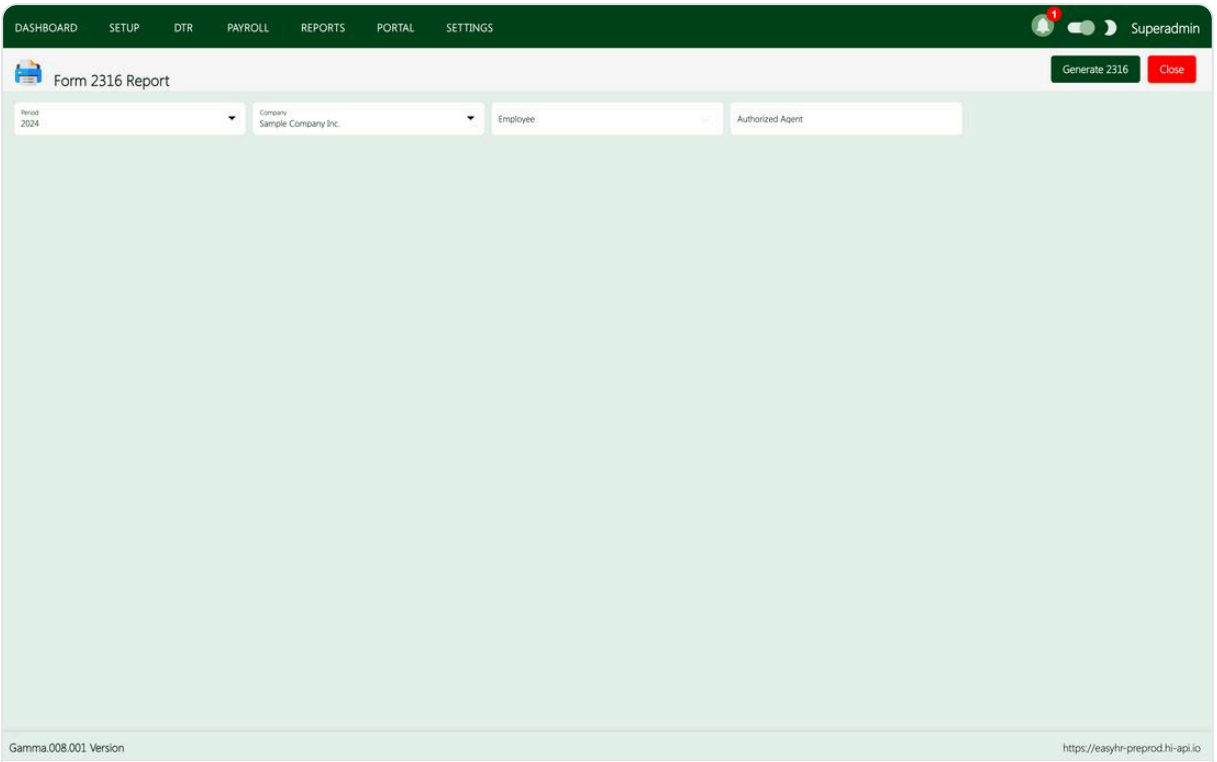
## 8.2 Form 2316

BIR Form 2316 — the certificate of compensation paid and tax withheld that each employee is given at the end of the year.

#### HOW TO GET THERE

**REPORTS → Form 2316** `/software/form2316-report`

> The menu entry for this screen is not shown in the demonstration environment. Whether it appears for you depends on your company's configuration and on your user rights.




Form 2316 — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Form 2316**.
2. Set the selection at the top of the screen: **Period**, **Company**, **Employee**, **Authorized Agent**.
3. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Period · Company · Employee · Authorized Agent

#### BUTTONS

Generate 2316 · Close

#### WHAT YOU SHOULD SEE

One Form 2316 per employee for the chosen year.

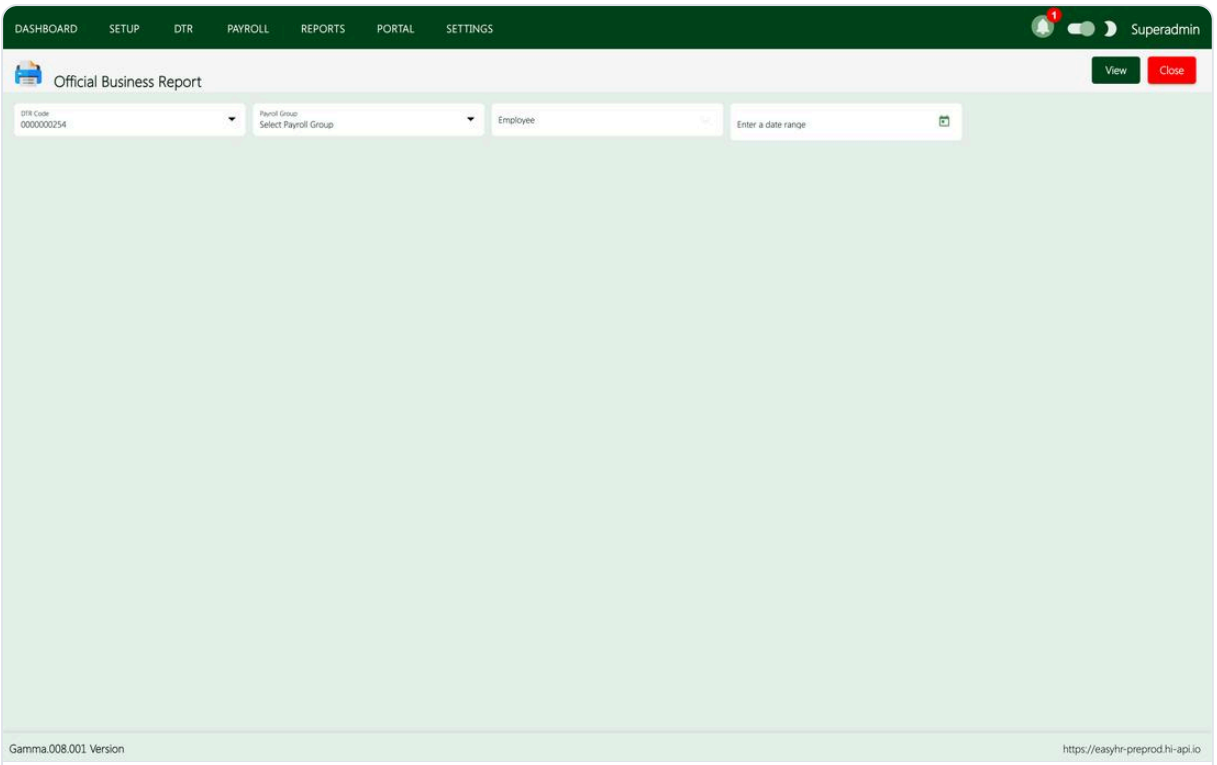
## 8.3 Official Business Report

Time spent away from the workplace on official business, as filed and approved.

### HOW TO GET THERE

**REPORTS → Official Business Report** `/software/official-business-report`

> The menu entry for this screen is not shown in the demonstration environment. Whether it appears for you depends on your company's configuration and on your user rights.




Official Business Report — the screen as it opens

### WHAT TO DO

1. Open **REPORTS → Official Business Report**.
2. Set the selection at the top of the screen: **DTR Code**, **Payroll Group**, **Employee**, **Enter a date range**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

### FIELDS ON THIS SCREEN

DTR Code · Payroll Group · Employee · Enter a date range

### BUTTONS

View · Close

### WHAT YOU SHOULD SEE

One line per official-business record.

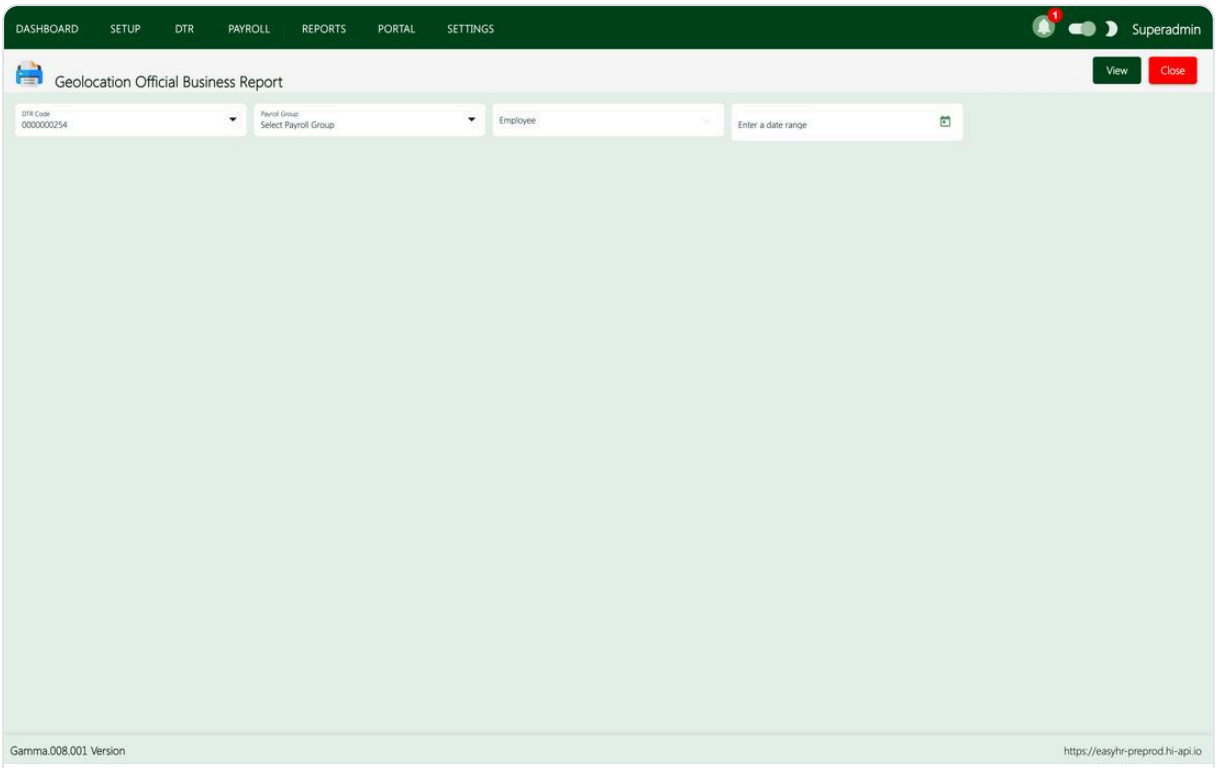
## 8.4 Geolocation Official Business Report

The same as the official business report, with the coordinates recorded when the employee logged in and out away from the office.

HOW TO GET THERE

**REPORTS → Geolocation Official Business Report** `/software/geolocation-official-business-report`

> The menu entry for this screen is not shown in the demonstration environment. Whether it appears for you depends on your company's configuration and on your user rights.




Geolocation Official Business Report — the screen as it opens

WHAT TO DO

1. Open **REPORTS → Geolocation Official Business Report**.
2. Set the selection at the top of the screen: **DTR Code**, **Payroll Group**, **Employee**, **Enter a date range**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

FIELDS ON THIS SCREEN

DTR Code · Payroll Group · Employee · Enter a date range

BUTTONS

View · Close

WHAT YOU SHOULD SEE

Official-business records with their locations.

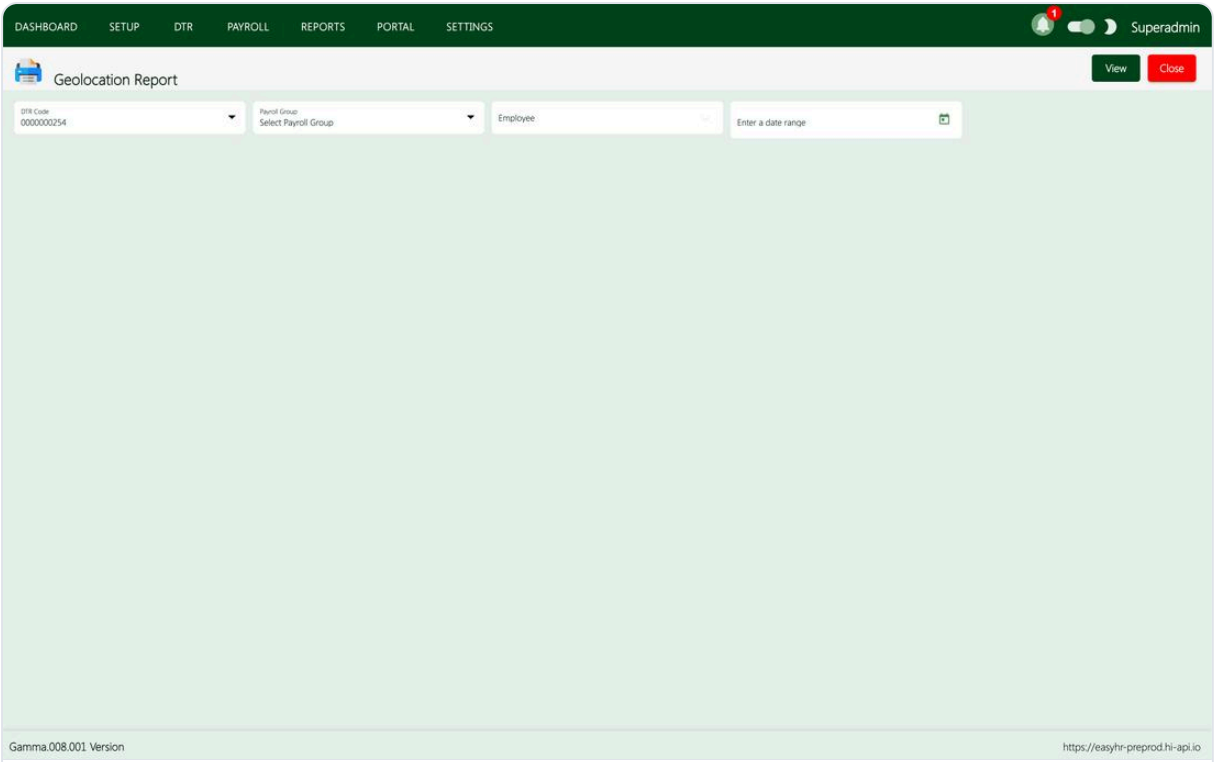
## 8.5 Geolocation Report

Where each clock-in and clock-out was recorded — latitude, longitude, date, time and log type — for employees who use the mobile application.

HOW TO GET THERE

**REPORTS → Geolocation Report** `/software/geolocation-report`

> The menu entry for this screen is not shown in the demonstration environment. Whether it appears for you depends on your company's configuration and on your user rights.




Geolocation Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Geolocation Report**.
2. Set the selection at the top of the screen: **DTR Code**, **Payroll Group**, **Employee**, **Enter a date range**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

DTR Code · Payroll Group · Employee · Enter a date range

#### BUTTONS

View · Close

#### WHAT YOU SHOULD SEE

The location of each attendance log for the chosen period.

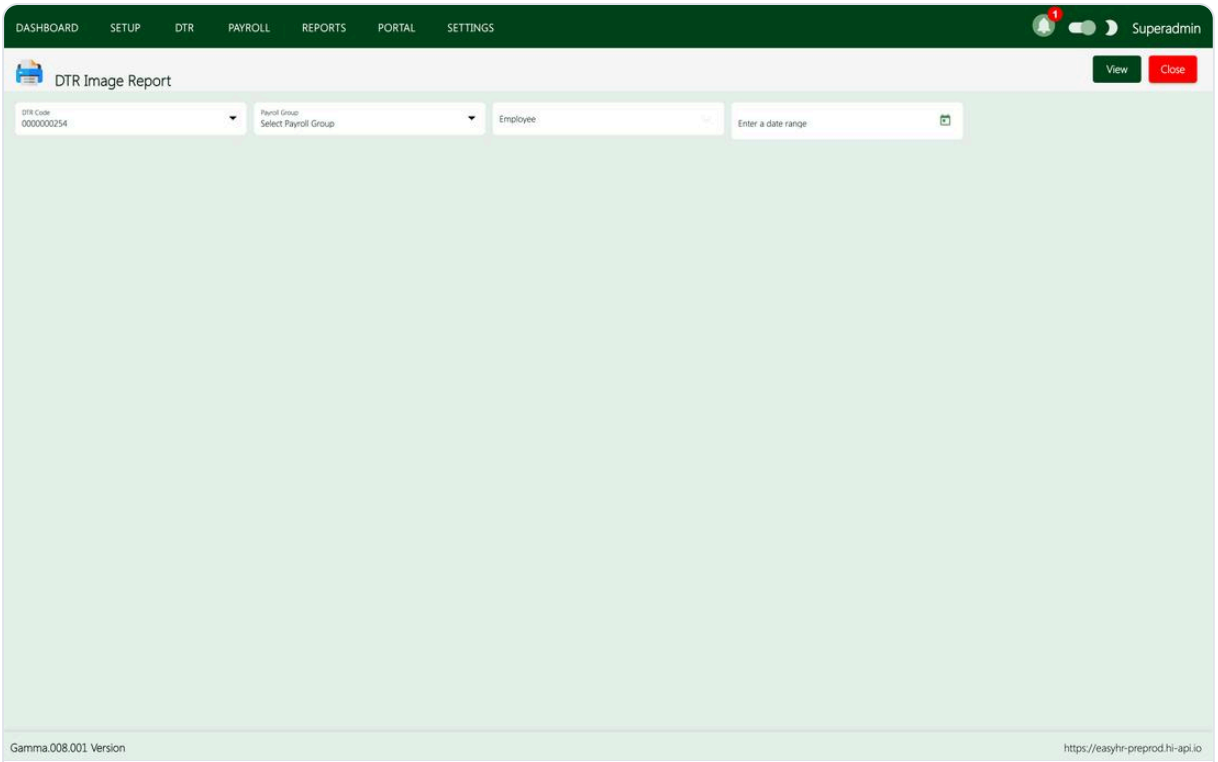
## 8.6 DTR Image Report

The photographs captured with the attendance logs, alongside the time recorded.

#### HOW TO GET THERE

**REPORTS → DTR Image Report** `/software/geo-image-report`

> The menu entry for this screen is not shown in the demonstration environment. Whether it appears for you depends on your company's configuration and on your user rights.




DTR Image Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → DTR Image Report**.
2. Set the selection at the top of the screen: **DTR Code**, **Payroll Group**, **Employee**, **Enter a date range**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

DTR Code · Payroll Group · Employee · Enter a date range

#### BUTTONS

View · Close

#### WHAT YOU SHOULD SEE

One entry per log, with the photograph taken at the time.

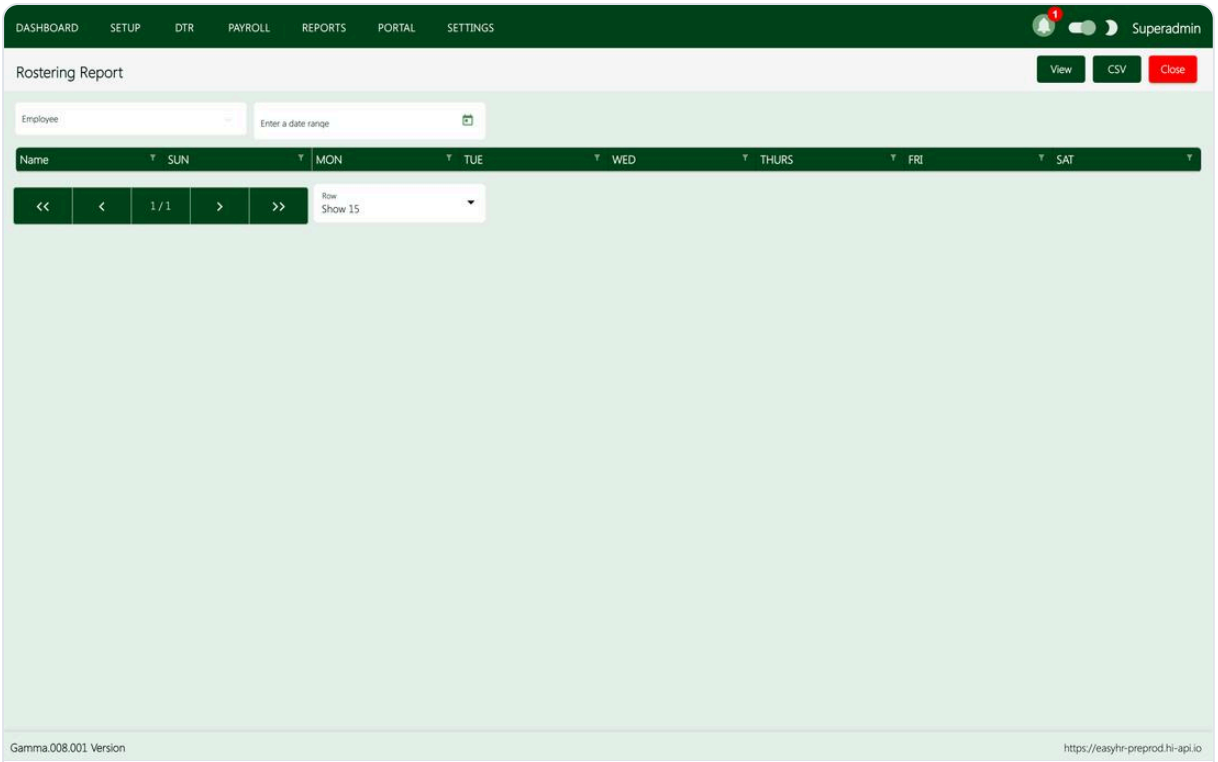
## 8.7 Rostering Report

The shift roster: who is scheduled on which shift, over the chosen period.

#### HOW TO GET THERE

**REPORTS → Rostering Report** `/software/rostering-report`

> The menu entry for this screen is not shown in the demonstration environment. Whether it appears for you depends on your company's configuration and on your user rights.




Rostering Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Rostering Report**.
2. Set the selection at the top of the screen: **Employee**, **Enter a date range**.
3. Click **View**. The report is built and opened in the viewer.
4. Click **CSV** instead to download the same figures as a spreadsheet file.
5. Click **Close** to leave the screen.

#### COLUMNS ON THIS SCREEN

Name · SUN · MON · TUE · WED · THURS · FRI · SAT

#### FILTERS

Employee · Enter a date range

#### BUTTONS

View · CSV · Close

#### WHAT YOU SHOULD SEE

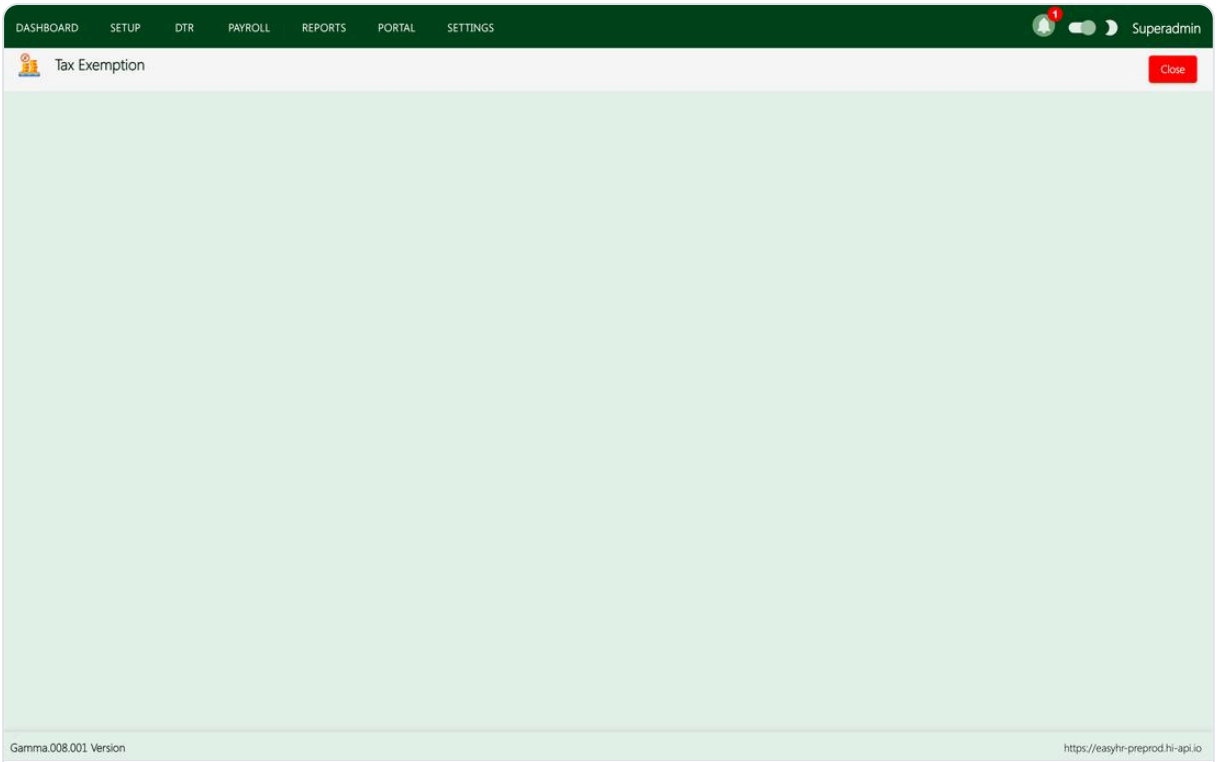
The roster for the employees and dates chosen.

## 8.8 Tax Exemption

The tax exemption codes and the amounts attached to them, used when withholding tax is computed for an employee.

#### HOW TO GET THERE

This screen has no entry on the menu in this build. Its address is `/software/tax-exemption-list`.



Tax Exemption — the screen as it opens

#### WHAT TO DO

1. This screen has no menu entry in this build; it is reached from the employee record where the exemption is chosen.

#### BUTTONS

Close

#### THE RECORD ITSELF

This module has a record screen, opened with the **Edit** button on a row. The demonstration environment holds no records for it, so it is not illustrated here.

#### WHAT YOU SHOULD SEE

The list of exemption codes.

#### WORTH KNOWING

**In the system this manual was written from the grid opens with no columns and no rows.** The screen and its pager are there, but there is nothing in it.

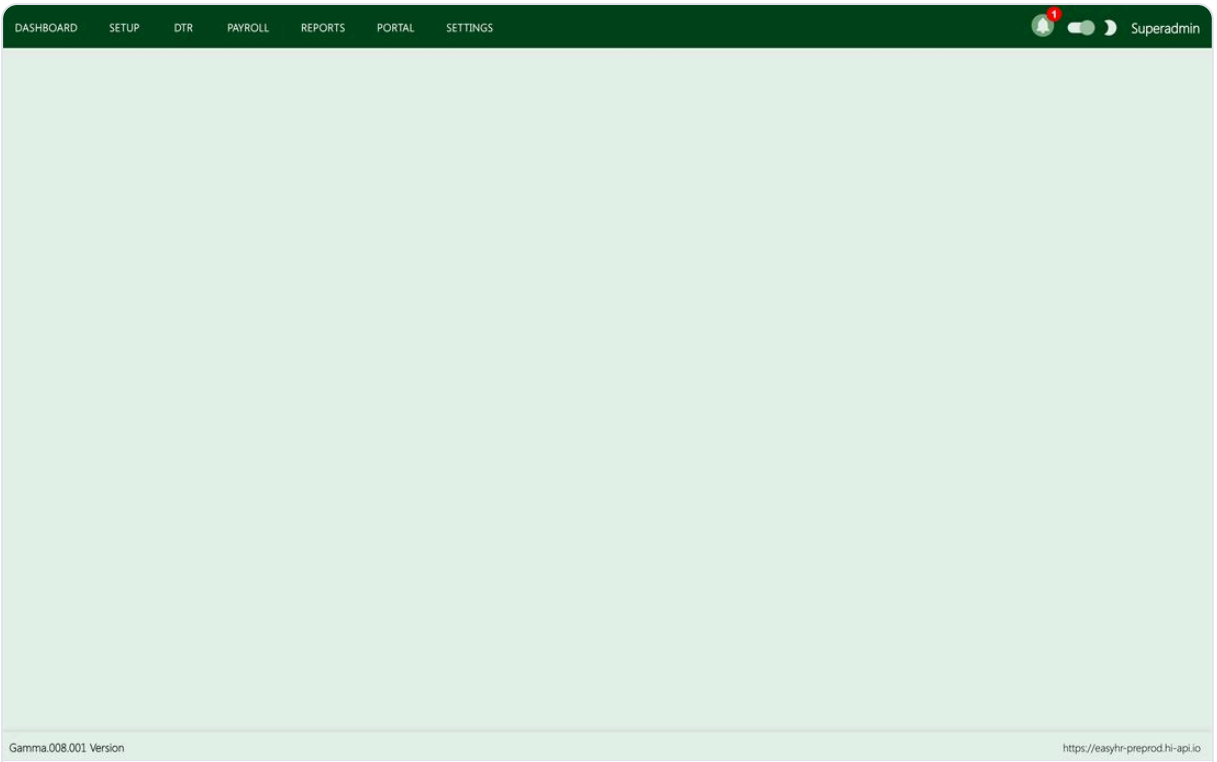
Tax exemption categories were removed from Philippine withholding tax by the TRAIN law, so this screen is of historical interest for most companies.

## 8.9 DTR Import Logs

The record of DTR imports: which file was loaded, when, by whom, and which lines the system refused. It is where to look when an import appears to have worked but rows are missing.

#### HOW TO GET THERE

This screen has no entry on the menu in this build. Its address is `/software/dtr-detail-import-logs-v2`.




DTR Import Logs — the screen as it opens

### WHAT TO DO

1. This screen has no menu entry in this build; it is reached from the DTR import step.

### WHAT YOU SHOULD SEE

One line per import, with the rows accepted and rejected.

### WORTH KNOWING

> **In the system this manual was written from the screen opens but shows nothing at all.** It has been reported for investigation.

# 9. Rostering (optional)

Rostering plans who works which shift on which day. It is built for teams that work around the clock, such as hospital wards and call centers: night shifts that end the next morning, three-shift schedules (day, evening, night) and two-shift schedules (12-hour shifts, or a long night shift such as 16:30 to 09:00 followed by days off). A published roster feeds the DTR, so lates, undertime, overtime and night differential are computed against the shifts that were actually rostered.

Rostering is an optional feature. It is off for every company until an administrator turns it on, and while it is off none of the screens in this chapter appear.

## 9.1 Turning rostering on

A company setting decides whether rostering exists at all; user rights decide who may use it.

#### HOW TO GET THERE

**SETUP** → **Company** — Edit the company, Settings tab. The tick box is shown only when you are signed in as **superadmin**.

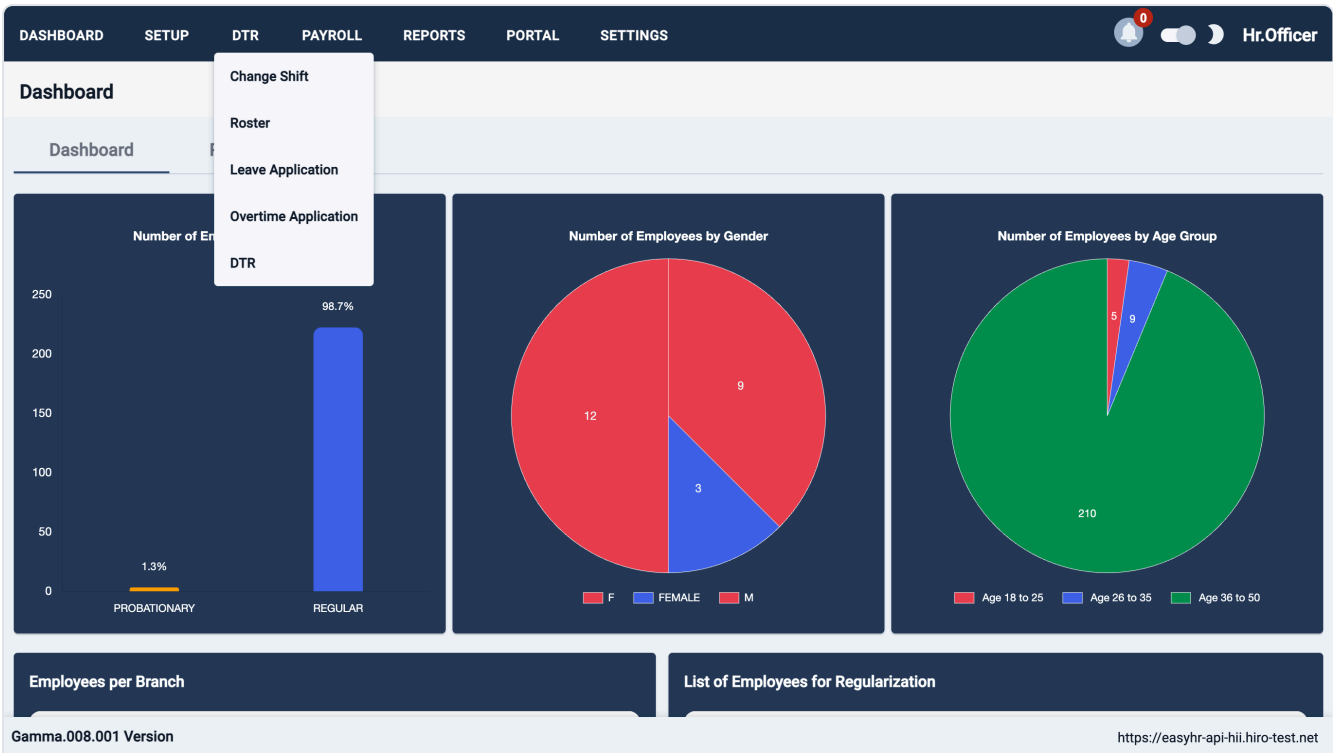
#### WHAT TO DO

1. Sign in as superadmin and open **SETUP** → **Company**.
2. Edit the company and tick **Is Show Rostering Feature** on the Settings tab.
3. Click **Save**, then **Lock**.
4. Open **SETUP** → **Users** and give the **Rostering Report** module to the people who plan rosters. Only superadmin can add this module.

| Right on Rostering Report | What it allows |
|---|---|
| Open | See the Roster menu entry, rosters, Roster Settings, the dashboard Rostering tab and the Rostering Report. |
| Add | Create a new roster. |
| Edit | Change cells, fill from a pattern, and change Roster Settings. |
| Lock | Publish a roster to the DTR. |
| Delete | Delete a roster that has never been published. |

#### WHAT YOU SHOULD SEE

After signing in again, **DTR** → **Roster** appears on the menu for users with the right. With the tick box cleared, the Roster menu entry, the dashboard Rostering tab and the Rostering Report are hidden, and the system refuses rostering requests.




The DTR menu with Roster, shown once rostering is on and the user has the right

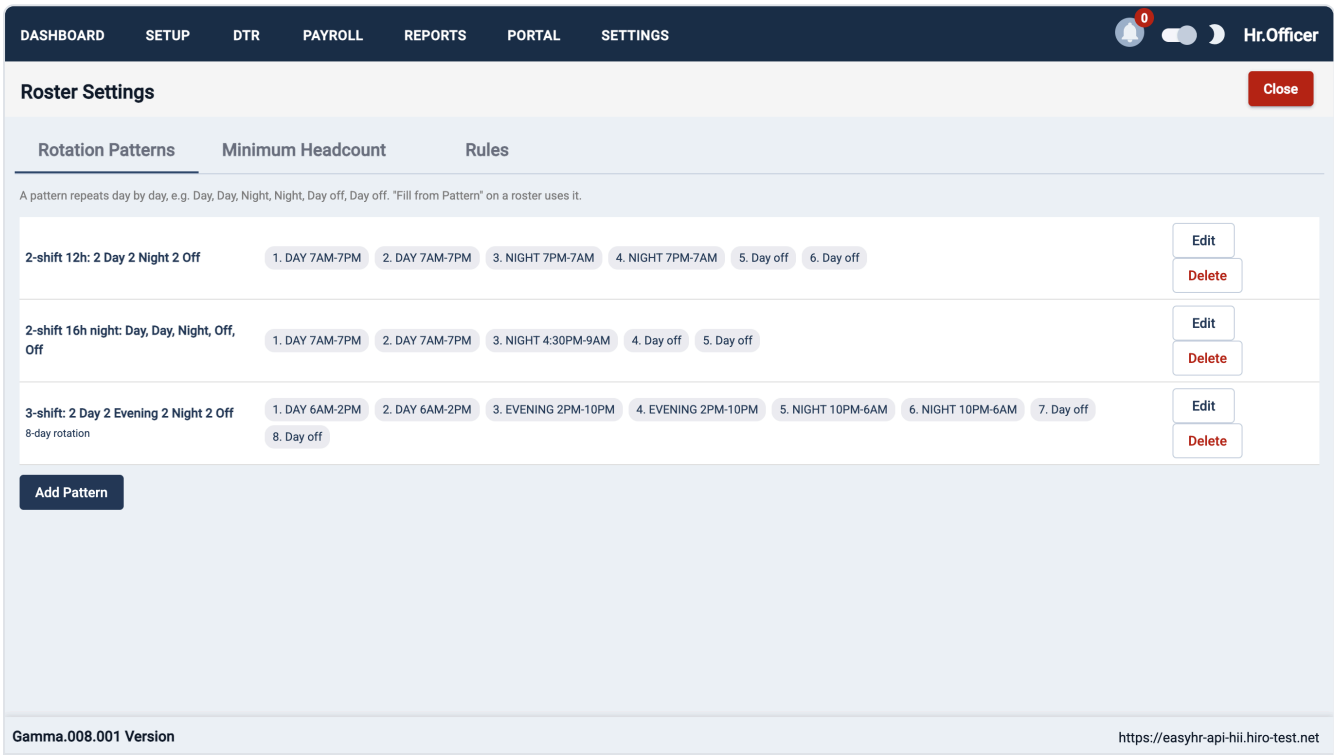
## 9.2 Roster Settings

Rotation patterns, minimum headcounts and rule limits, shared by every roster of the company. Set these up once before the first roster.

### HOW TO GET THERE

**DTR → Roster → Roster Settings** `/software/roster-setup`

> Before you start, create the shifts you roster with in **SETUP → Shift** (2.4) — for example DAY 6AM-2PM, EVENING 2PM-10PM, NIGHT 10PM-6AM, or DAY 7AM-7PM and NIGHT 4:30PM-9AM — and one shift whose every day is a rest day, used for days off.

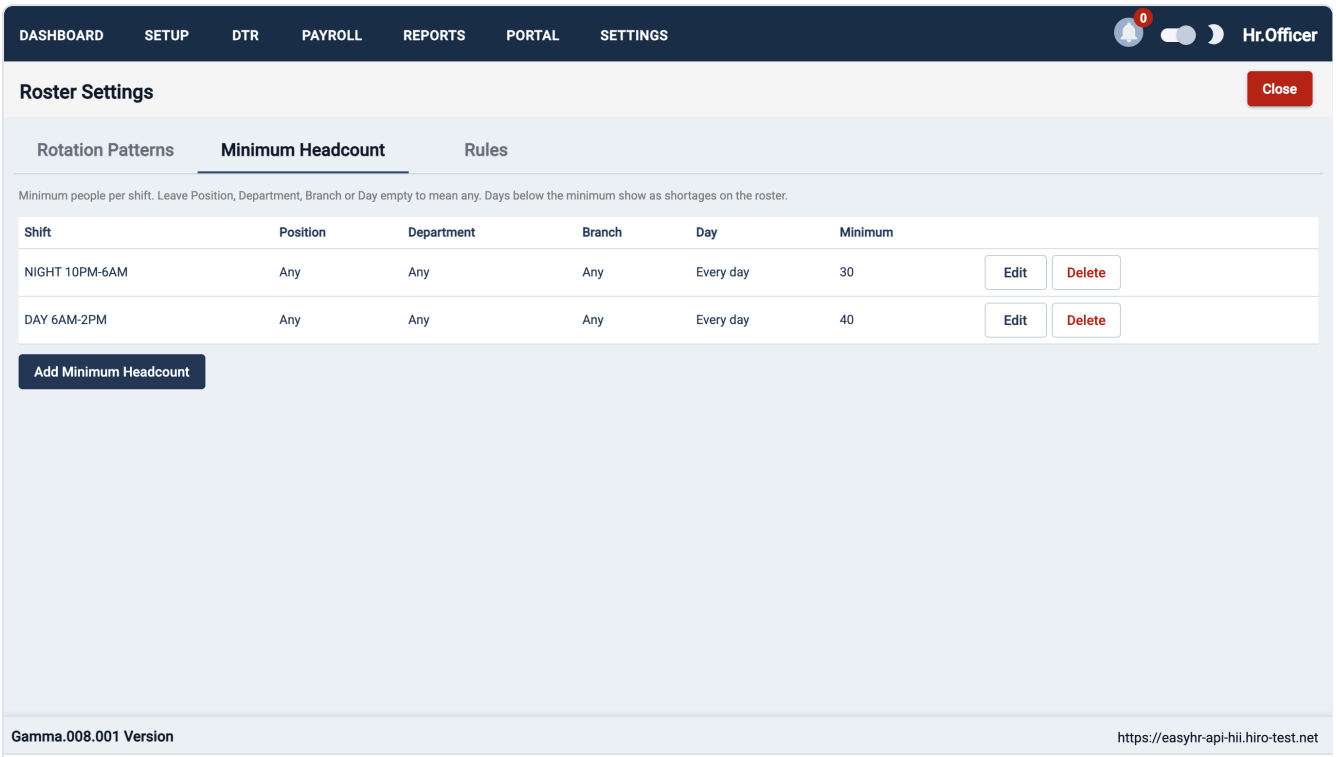



Rotation Patterns — two-shift and three-shift examples

### ROTATION PATTERNS TAB

1. Click **Add Pattern** and give it a name.
2. Click the shifts in the order they repeat, and **Day off** for rest days. Click × on a step to remove it.
3. Click **Save Pattern**.

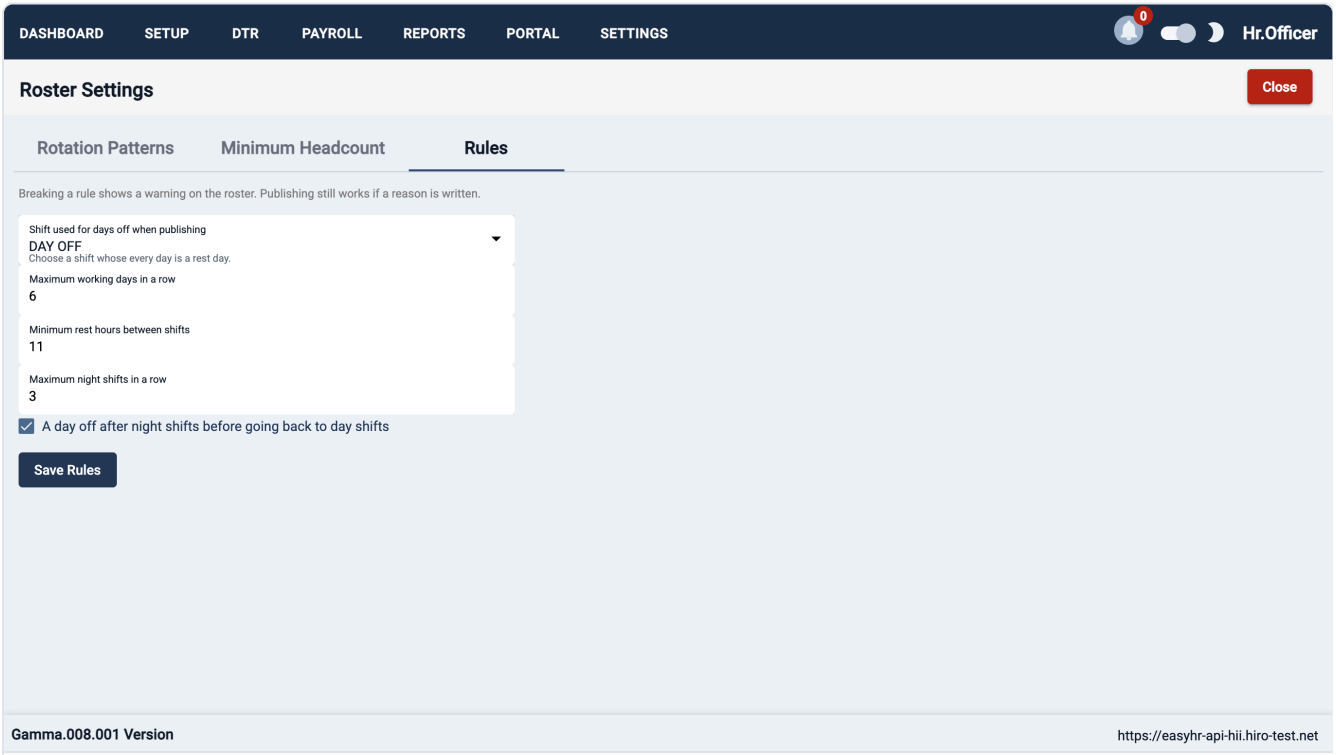
Examples: three-shift Day Day Evening Evening Night Night Day off Day off ; two-shift with a long night Day Day Night 16:30–09:00 Day off Day off .




Minimum Headcount — the fewest people each shift needs

### MINIMUM HEADCOUNT TAB

1. Click **Add Minimum Headcount**.
2. Choose the shift and the minimum number of people. Narrow it, if needed, to a Position, Department, Branch or Day; leave them empty to mean any.
3. Click **Save**. Add one line per need, e.g. NIGHT 10PM-6AM, Position Staff Nurse, minimum 3.




Rules — limits that raise warnings on the roster

### RULES TAB

| Field | Meaning |
|---|---|
| Shift used for days off when publishing | The all-rest-day shift written for every day off. Required before a roster with days off can be published. |
| Maximum working days in a row | Warn when someone works more days in a row (default 6). |
| Minimum rest hours between shifts | Warn when the gap from the end of one shift to the start of the next is shorter (default 11). |
| Maximum night shifts in a row | Warn on a longer run of night shifts (default 4). |
| A day off after night shifts | Warn when someone goes from a night shift straight back to a day or evening shift. |

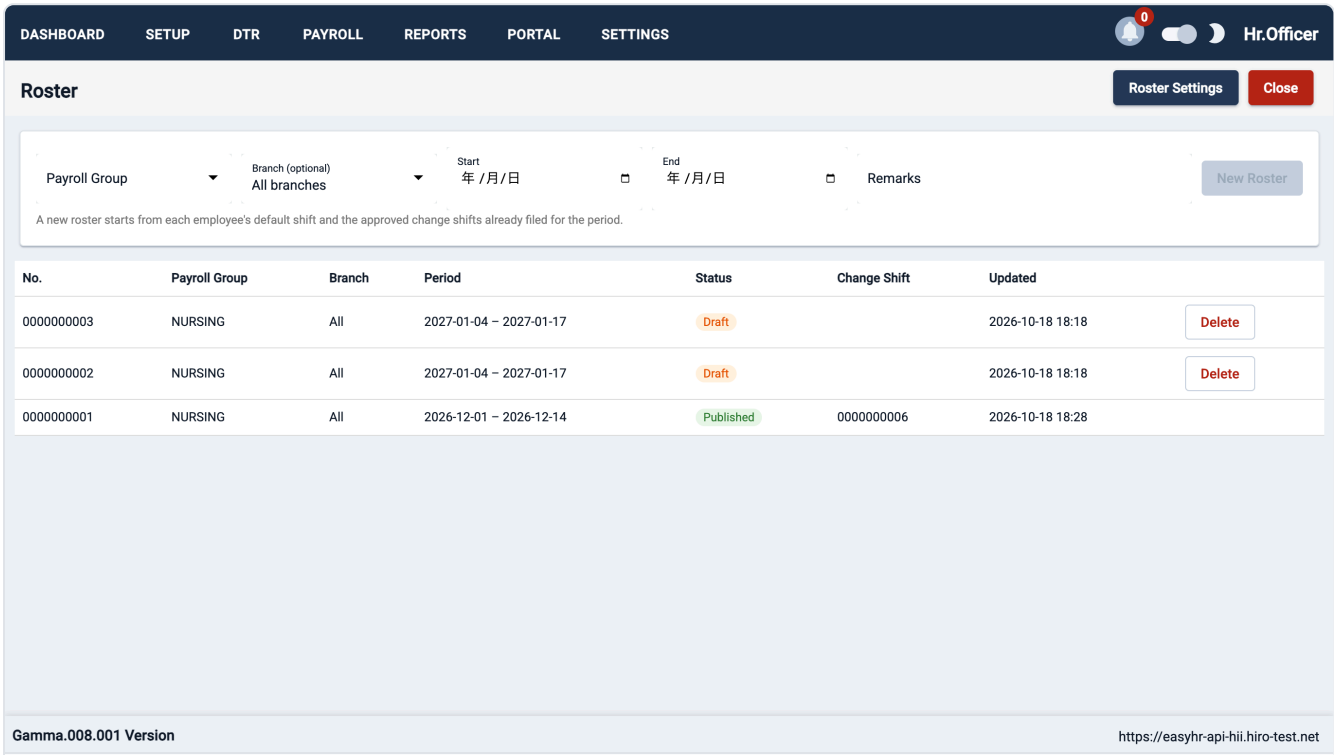
Rules only warn. A roster that breaks them can still be published when a reason is written.

## 9.3 Roster

The roster itself: one grid per payroll group (optionally one branch) and period, employees down the side and dates across.

### HOW TO GET THERE

**DTR → Roster** `/software/roster-list`




Roster — the list and the new-roster bar

### CREATING A ROSTER

1. Choose the **Payroll Group**, optionally a **Branch**, and the **Start** and **End** dates (up to 62 days; usually the payroll cut-off).
2. Click **New Roster**. The grid opens, filled with each employee's default shift and with the approved change shifts already filed for the period.

A three-shift roster. Night cells show the next-day end (22:00–06:00+1); the red outline marks a cell with a warning

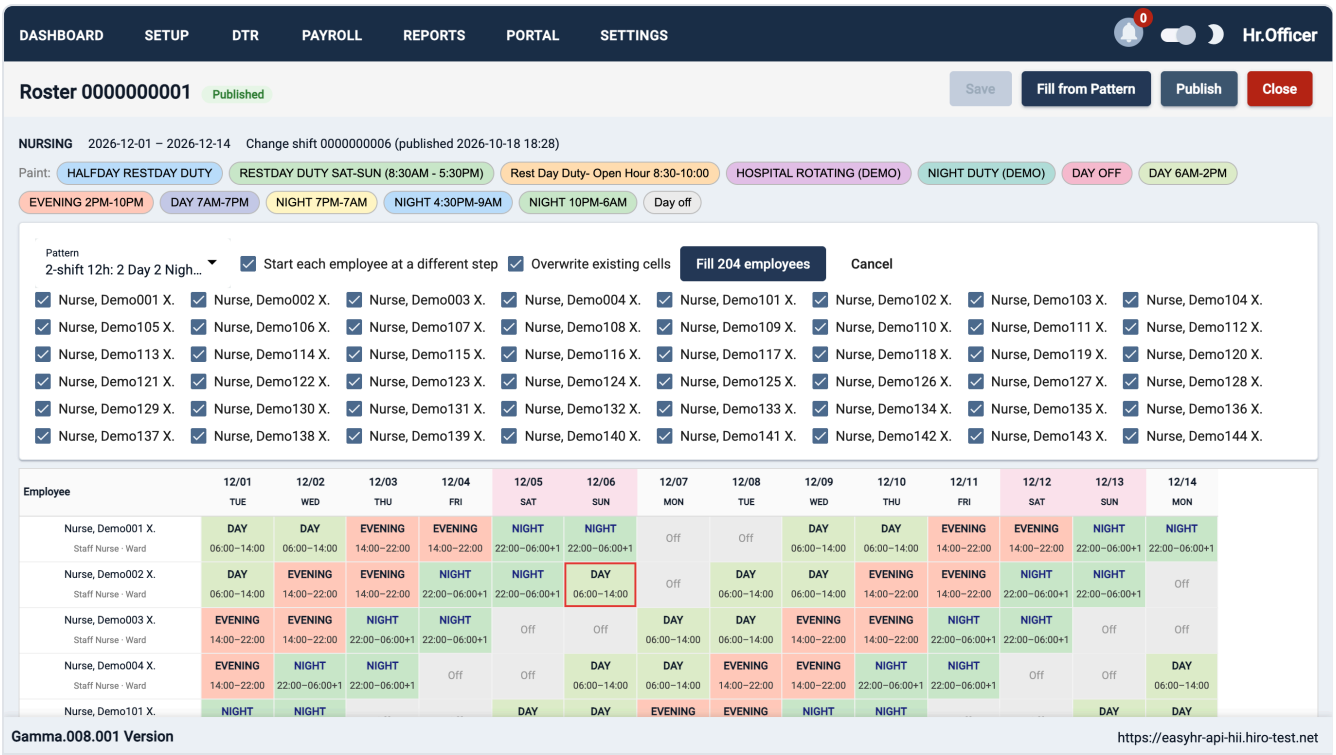
### EDITING THE GRID

1. Click a shift in the **Paint** row (or **Day off**).
2. Click the cells to give them that shift. Changed cells are outlined with a dashed line until saved; clicking a cell again with the same shift undoes it.
3. Click **Save**. The times and warnings are worked out again.

| In a cell | Meaning |
|---|---|
| Shift name and times | The shift for that day; **+1** means it ends the next day. |
| Off / Rest | Day off, or a shift whose day is a rest day. |
| Leave | The employee has approved leave that day. |
| Red outline | The cell breaks a rule; point at it to read why. |
| Shortages row | Red count under a date: minimum headcounts not met that day. |

| Employee | 01/04 MON | 01/05 TUE | 01/06 WED | 01/07 THU | 01/08 FRI | 01/09 SAT | 01/10 SUN | 01/11 MON | 01/12 TUE | 01/13 WED | 01/14 THU | 01/15 FRI | 01/16 SAT | 01/17 SUN |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Nurse, Demo001 X. Staff Nurse · Ward | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off |
| Nurse, Demo002 X. Staff Nurse · Ward | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off |
| Nurse, Demo003 X. Staff Nurse · Ward | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 |
| Nurse, Demo004 X. Staff Nurse · Ward | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 |
| Nurse, Demo101 X. Staff Nurse · Ward | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 |
| Nurse, Demo102 X. Staff Nurse · Ward | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off |
| Nurse, Demo103 X. Staff Nurse · Ward | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off |
| Nurse, Demo104 X. Staff Nurse · Ward | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 |
| Nurse, Demo105 X. Staff Nurse · Ward | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 | NIGHT 16:30–09:00+1 | Off | Off | DAY 07:00–19:00 | DAY 07:00–19:00 |
| Nurse, Demo106 X. | Off | DAY | DAY | NIGHT | Off | Off | DAY | DAY | NIGHT | Off | Off | DAY | DAY | NIGHT |

A two-shift roster: 12-hour day shifts and a 16-hour night shift (16:30–09:00 the next day) followed by two days off




Fill from Pattern

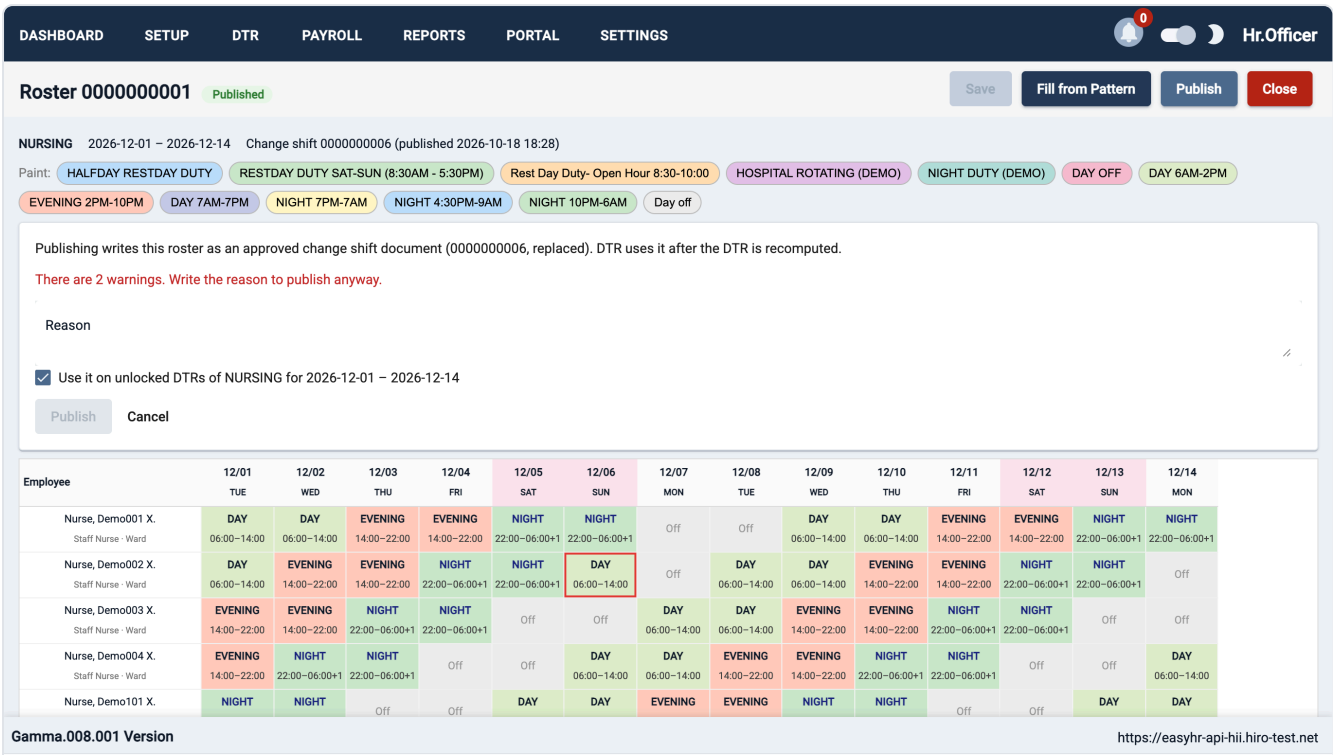
## FILLING FROM A PATTERN

1. Click **Fill from Pattern** and choose the pattern.
2. Leave **Start each employee at a different step** ticked to spread people over the shifts; clear it to give everyone the same sequence.
3. Tick **Overwrite existing cells** to replace what is there, or clear it to fill only empty cells.
4. Untick employees who should not be filled, then click **Fill**. Adjust single cells afterwards by painting.

Warnings under the grid, with a filter by type

### WARNINGS

| Type | Raised when |
|---|---|
| CONSECUTIVE_DAYS | More working days in a row than the rule allows. |
| NIGHT_RUN | More night shifts in a row than the rule allows. |
| OFF_AFTER_NIGHT | A day or evening shift straight after night shifts. |
| REST_HOURS | Too few hours between the end of one shift and the start of the next. |
| ON_LEAVE | A shift on a day of approved leave. |
| SHORTAGE | A shift on a date has fewer people than its minimum headcount. |




Publish — a reason is required while there are warnings

### PUBLISHING TO THE DTR

1. Save any changes, then click **Publish**.
2. If there are warnings, write the reason (for example, who agreed to the extra shift).
3. Leave **Use it on unlocked DTRs …** ticked to point the unlocked DTRs of the same payroll group and exactly the same dates at the roster.
4. Click **Publish**. The roster becomes an approved, locked Change Shift document (3.2) and its number is shown above the grid.
5. Open the DTR (3.5), check that this Change Shift document is selected, and compute the DTR again.

### CHANGING A ROSTER AFTER PUBLISHING

1. Open the roster, paint the cells that change and click **Save**. The roster goes back to **Draft**.
2. Click **Publish** again. The same Change Shift document is rewritten.
3. Compute the DTR again so it uses the new shifts.

When an employee's change-shift application is approved after the roster was made, a yellow notice above the grid says how many approved requests differ from the roster. Click **Show** to see them and **Bring in** to copy them into the roster (they are marked "Change shift request"), then publish again. Until then the DTR keeps following the published roster.

> The DTR keeps the last published version until you publish again and recompute the DTR. A published roster cannot be deleted; correct it and publish again.

### WHAT YOU SHOULD SEE

The roster shows **Published** with the Change Shift number. In the DTR, each employee's shift per date follows the roster, night shifts run into the next morning, and lates, overtime and night differential are computed against them.

## 9.4 What else changed

### ROSTERING REPORT AND THE DASHBOARD ROSTERING TAB (8.7)

- Both are available only when rostering is on for the company.
- They now show the shift each person actually works: approved change shifts, including published rosters, over the default shift.
- Night shifts end on the next day (for example 22:00 to 06:00 the following morning) instead of the same day.
- Only approved leave is shown as On Leave.

### CHANGE SHIFT (3.2)

- The DTR now uses only **approved** change-shift lines. Applications filed in the portal change the DTR only after they are fully approved; denied ones never do.
- Lines HR adds on the Change Shift screen are ticked **Approved** by default, and lines loaded with **Import** are approved.