

# easyHR User Manual

Build Gamma.008.003

Human Incubator Inc.

09 September 2026 · updated 21 October 2026

## What's new in the 21 October 2026 update

This update brings the manual in line with the easyHR release of 20–21 October 2026. Where a screen has been corrected, the manual now describes the screen as it works today, and the earlier "Note:" warnings for those points have been removed or rewritten.

- **Setup, DTR and Payroll (2.1–4.4):** a locked record now refuses changes with a clear reason; Add/Close no longer leaves "NA" records; input checks (empty names, negative amounts, duplicates, dates outside the period, wrong payroll group); delete rules and messages; Change Shift, Leave and Overtime refusals; Import now checks the whole file and lists skipped rows; CSV files open cleanly; Get Loan keeps hand-added lines; Payroll Lock rules.
- **Reports (5.1–5.25):** headings, company name, page numbers and print dates; Net Take-Home Pay and contribution/tax columns; Bank Detail with account numbers; Payslip, SSS Loan, SSS Calamity Loan, HDMF Loan, Loan Summary and Loan Deduction reports describe what they now print; Tardiness, Absent and Training reports; the month must be set before a payroll is locked.
- **Employee Portal (6.1) and Settings (7.1–7.5):** clearer messages; System Tables Labels work; Code Tables protect values in use; Audit Trail includes the last day, shows date and time, and masks passwords.
- **Additional screens and Rostering (8–9):** Tax Exemption list opens; Official Business, Geolocation, DTR Image and Rostering reports; rostering rules (overlap, shortage, Overwrite existing cells, locked roster documents).
- Short **Note:** boxes remain only where a screen still needs care (for example money-affecting items such as withholding tax, SSS gaps, 13th month, Alphalist and Form 2316, which are not changed yet).

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# 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

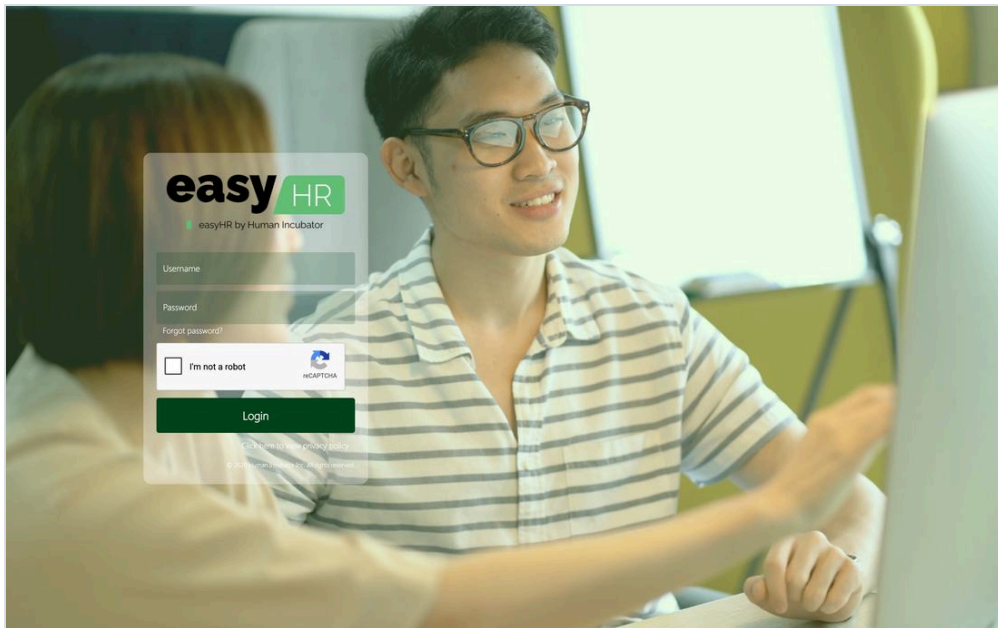
The manual is written for the people who run easyHR day to day: the HR officer who keeps the employee records, the timekeeper who prepares the daily time record, the payroll officer who computes and locks the payroll, and the administrator who sets the system up and gives people access. No technical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

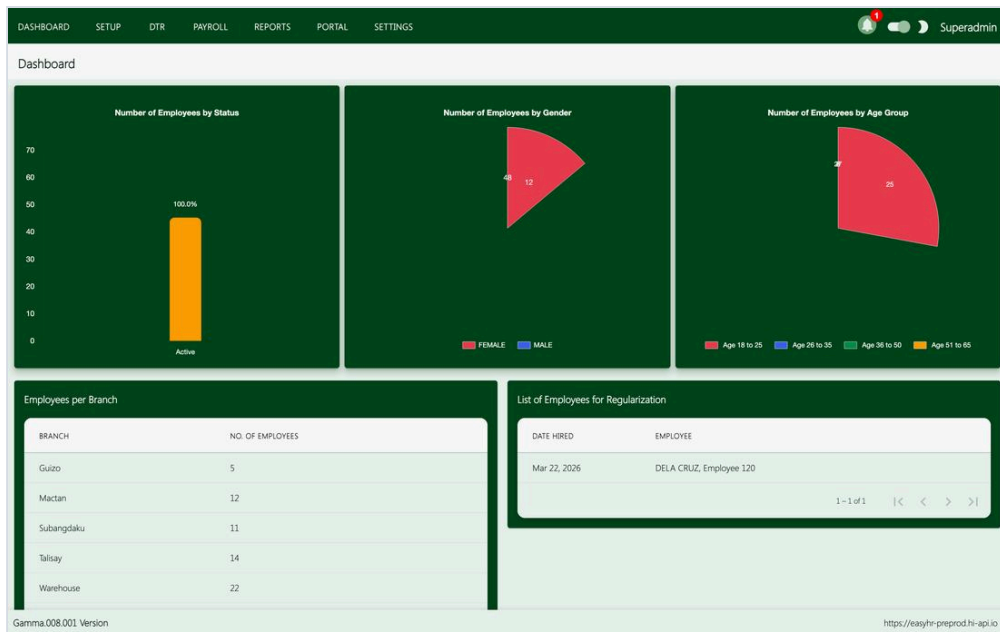
## The screen frame

Every screen has the same frame.

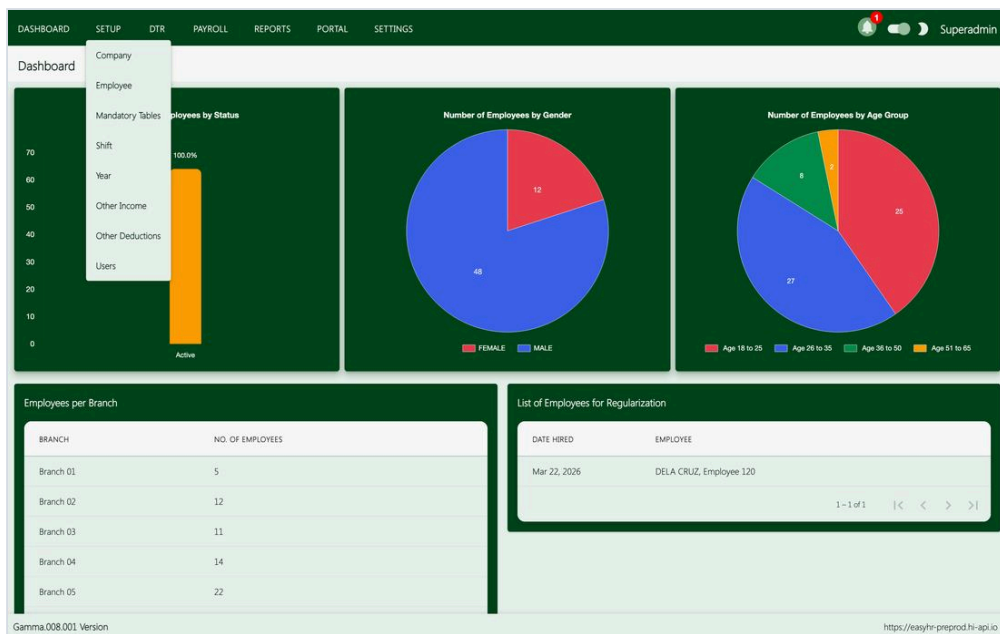
- The **top bar** carries the seven menus — Dashboard, Setup, DTR, Payroll, Reports, Portal and Settings. Click one and its screens drop down.
- At the right of the top bar are the **notification bell**, a **colour switch**, a **Dark mode** switch (the crescent moon) and **your user name**. Click your 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.

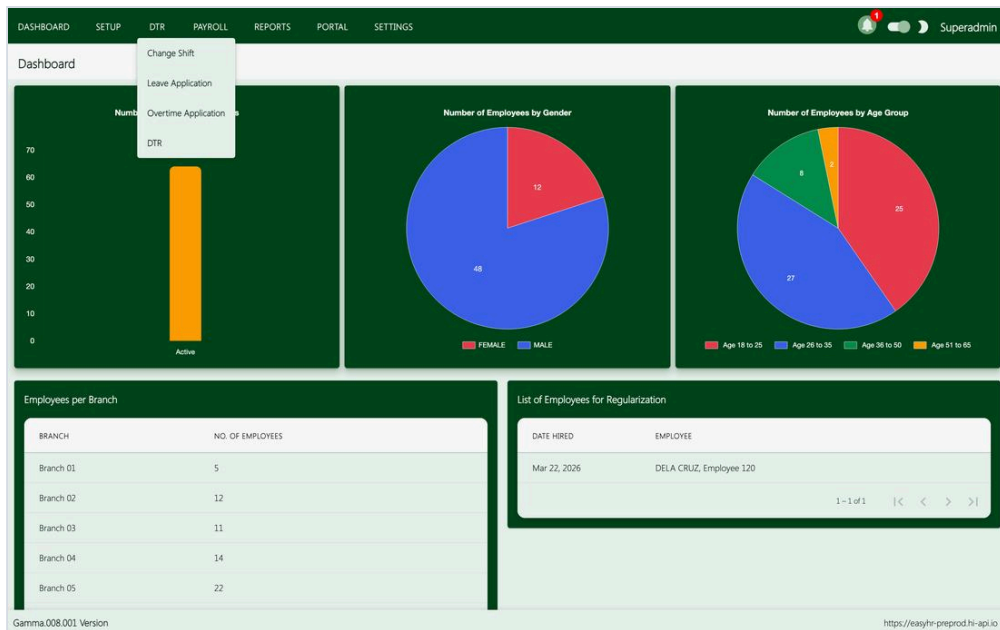
## THE SEVEN MENUS



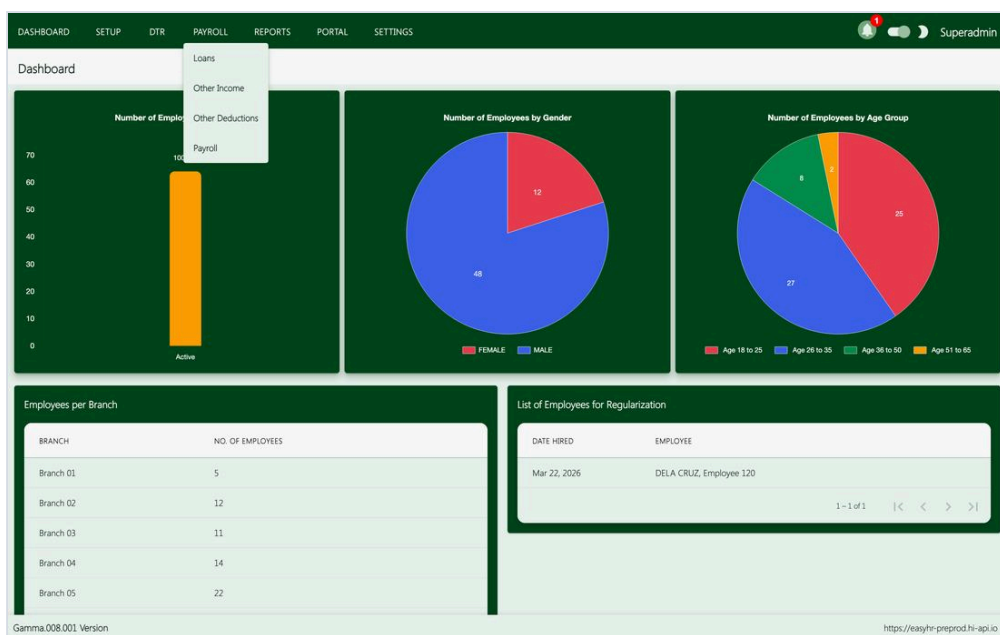
The DASHBOARD menu



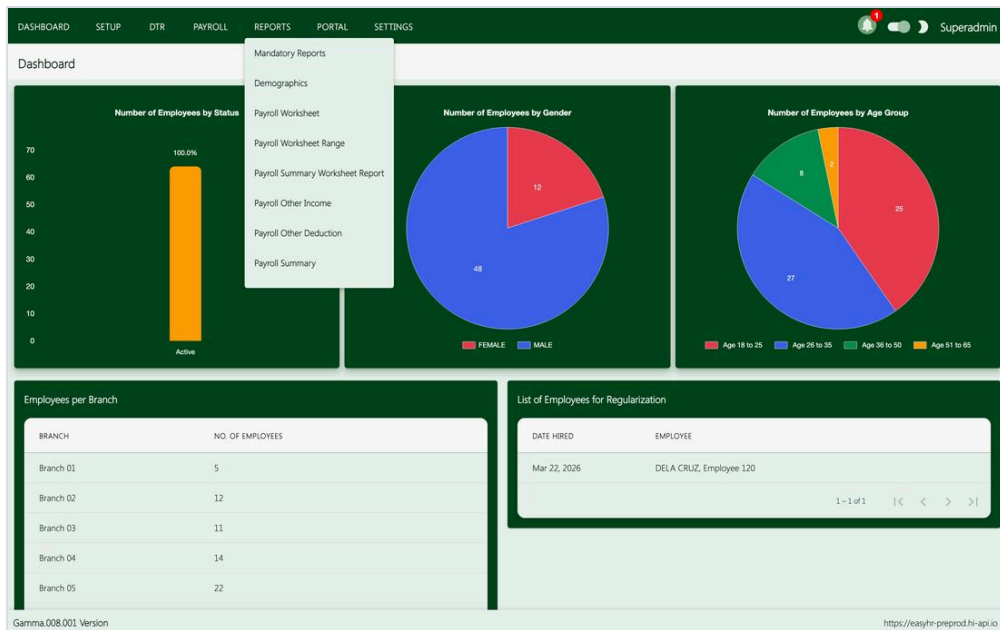
The SETUP menu



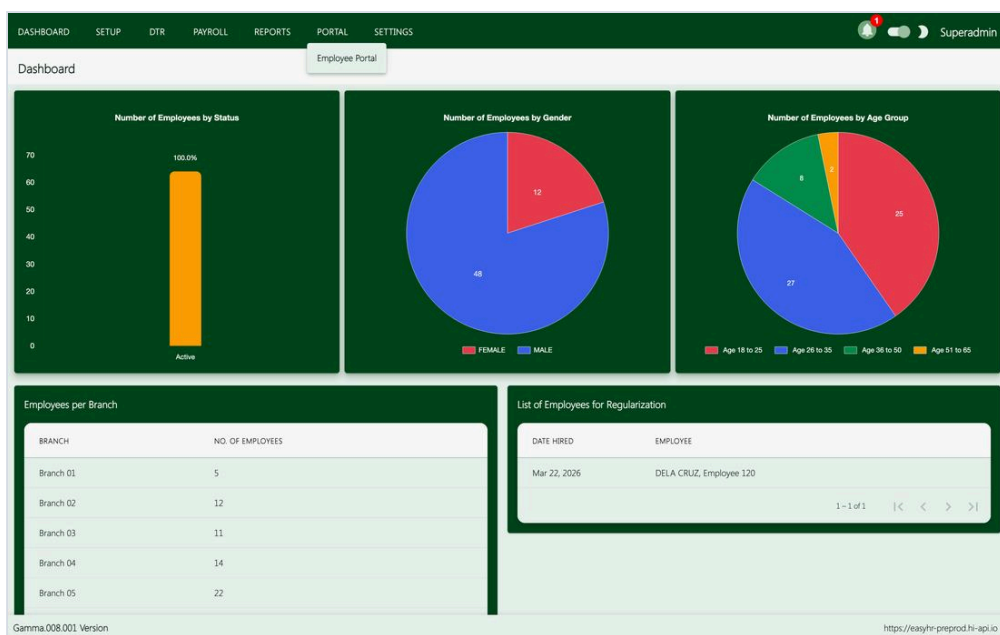
The DTR menu



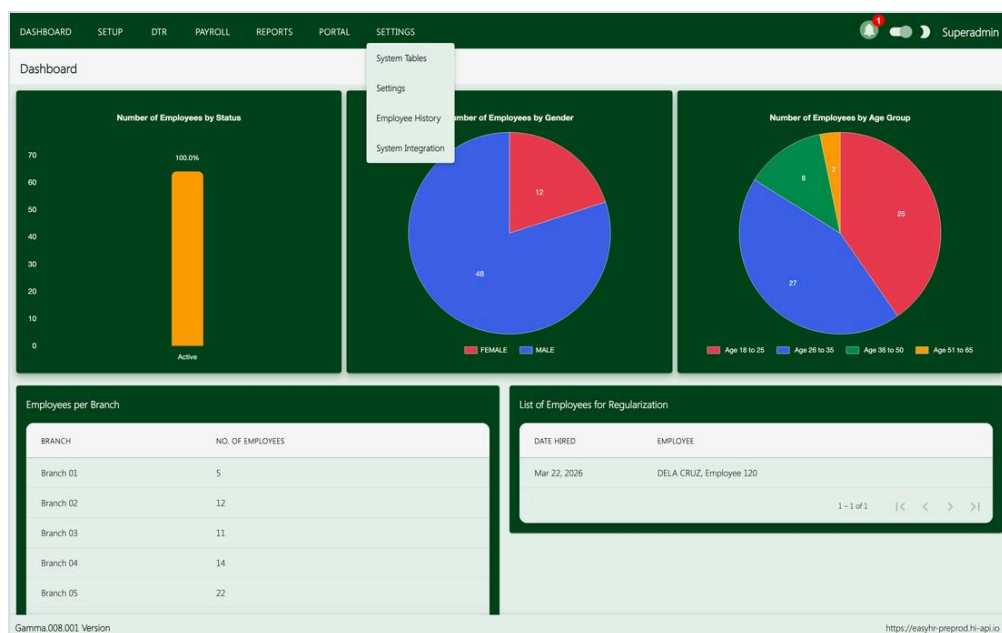
The PAYROLL menu



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 locked record cannot be deleted (unlock it first), and a record that has already been used in a transaction cannot be deleted. When the system refuses, the red message on the screen gives the reason in plain English, for example that the record is locked or is in use.
- 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. On most screens Add saves the new record straight away, with a new code, the name “NA” and today's date, and opens it. Fill it in and click **Save**. If you decide not to use it, delete it from the list; on the Company screen, clicking Close without saving removes the new company again.
- 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. It offers only the payroll groups assigned to your user account (see 2.9 Users).

## 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. While a record is locked, Save and Lock are greyed out and the **Add**, **Edit** and **Delete** buttons on its tabs are not available. To change it,

click Unlock, make the change, click Save, then Lock again. The system itself also refuses to change a locked record, so a locked record cannot be altered by any other route either; the screen shows the reason.

- **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 PDF viewer at the bottom of the screen. Use the viewer's buttons to download or print it.
- **CSV**, on the reports that have it, downloads the figures as a spreadsheet file. Most reports have no CSV button.
- **Close** leaves the screen and returns to the Dashboard.

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. Only locked payrolls and DTRs appear in the report boxes, newest first.

Most reports appear on the menu only for users who have the matching right in their user account (see 2.9 Users).

## 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.

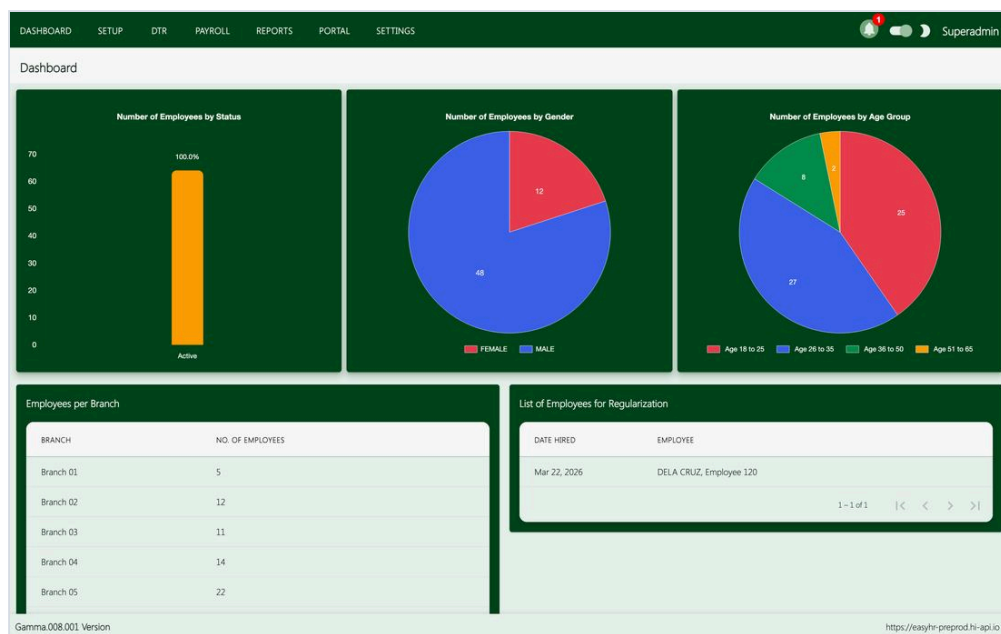
## 1.1 Dashboard

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.

The age-group panel includes **Under 18**, **Over 80** and **Unknown (no birth date)** groups, so its total is the same head count as the other panels. An employee whose date of birth has not been entered is counted under Unknown.

## 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.

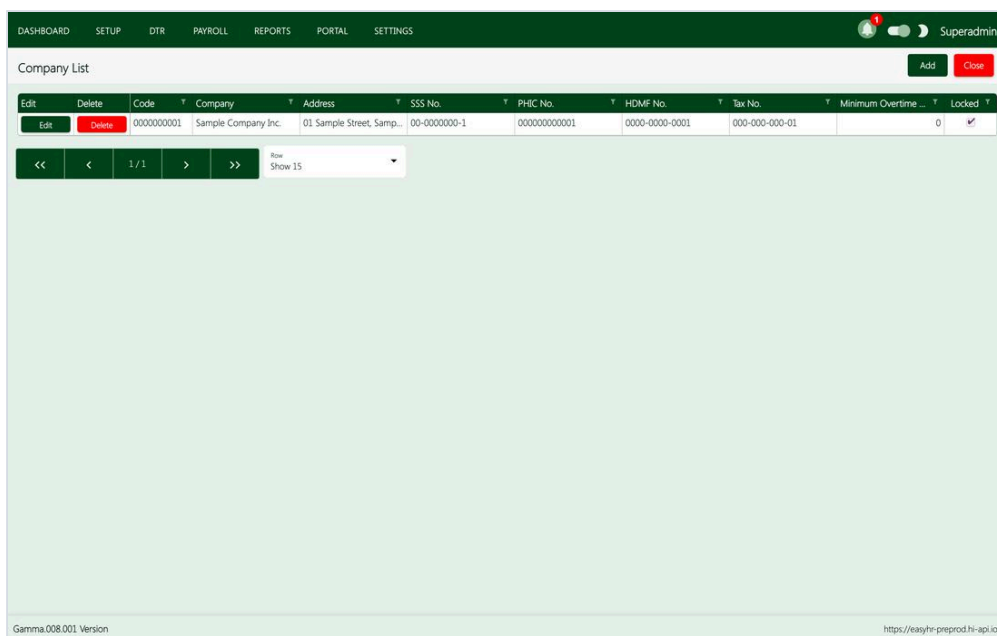
### 2.1 Company

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. Add opens a new company with the next code (for example 0000000002) and the name “NA”. If you click **Close** without saving it, the new company is removed again. If the company is locked, click **Unlock** first.
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. Each line is one user and one branch; a branch can have as many approvers as you need.
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.

- On the **Announcement** tab write the notice that employees see in the portal. The portal shows only announcements whose **Announcement Date** is today or later; once the date has passed, the announcement is no longer shown.
- Type the company name and click **Save**, then **Lock**. While the company is locked, Save and Lock are greyed out and nothing can be changed, including the Add, Edit and Delete buttons on the Approver, Settings and Announcement tabs. To change it later, click **Unlock**, make the change, 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

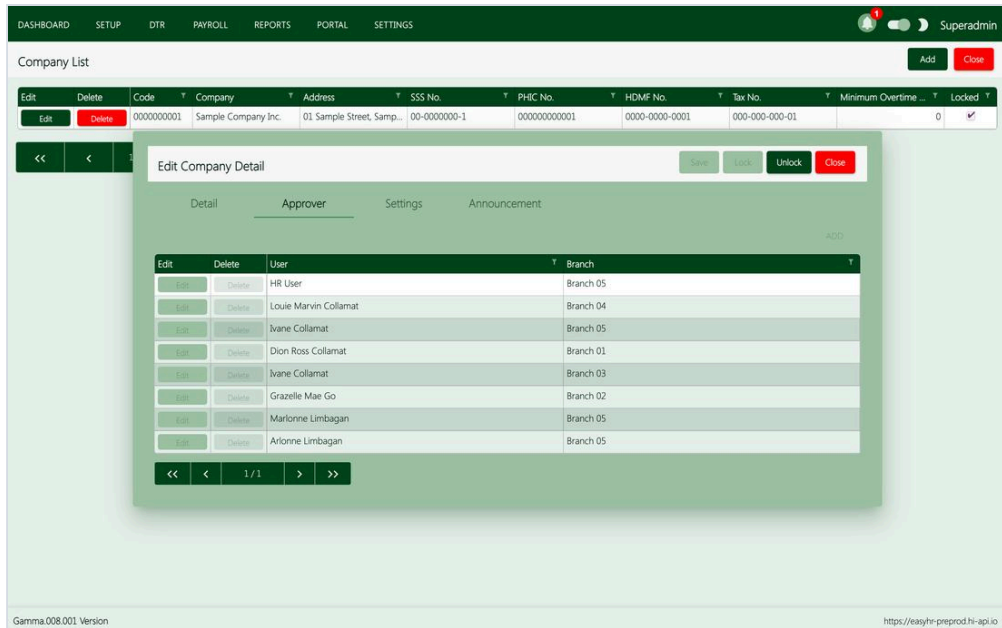
**Fields:** CompanyCode Company Minimum Overtime Hours SSS Account HDMF Account PHIC Account Tax Account SSS No. PHIC No. HDMF No. Tax No. Funding Account Address Zip Code RDO Code Branch Code City

To add the company logo, click **Choose File** and pick the image. Click **X** to remove it.

Note: The uploaded logo may not be previewed on this screen, depending on how file storage is set up for your system. The logo is still used on printed reports. A logo uploaded earlier is not moved automatically.

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

## APPROVER

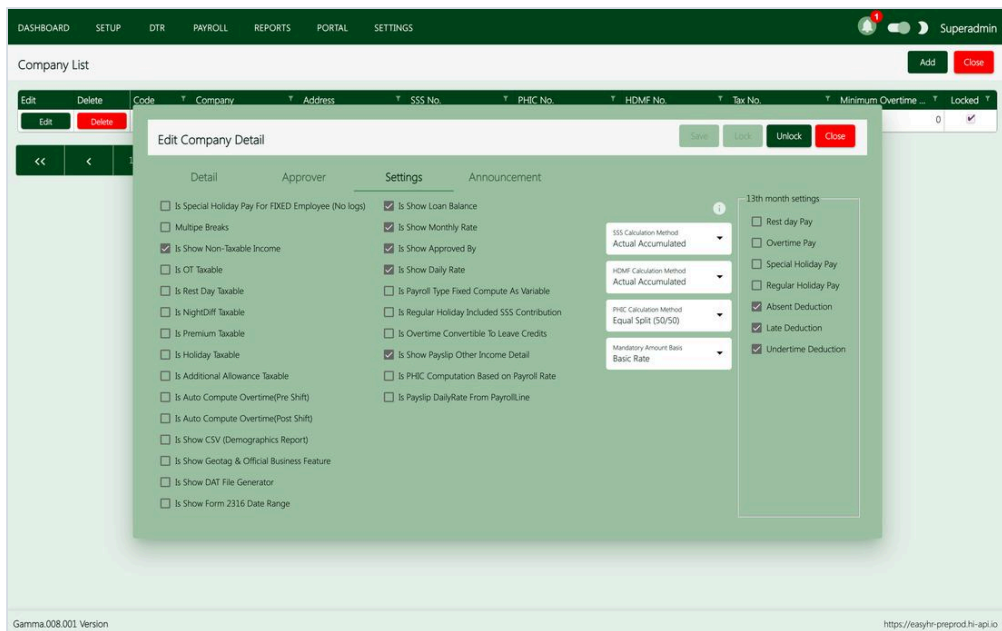


Company — Approver tab

**Columns:**

**ADD opens:**    — click ▼ next to User to open the user list, then click **Pick**.

## SETTINGS



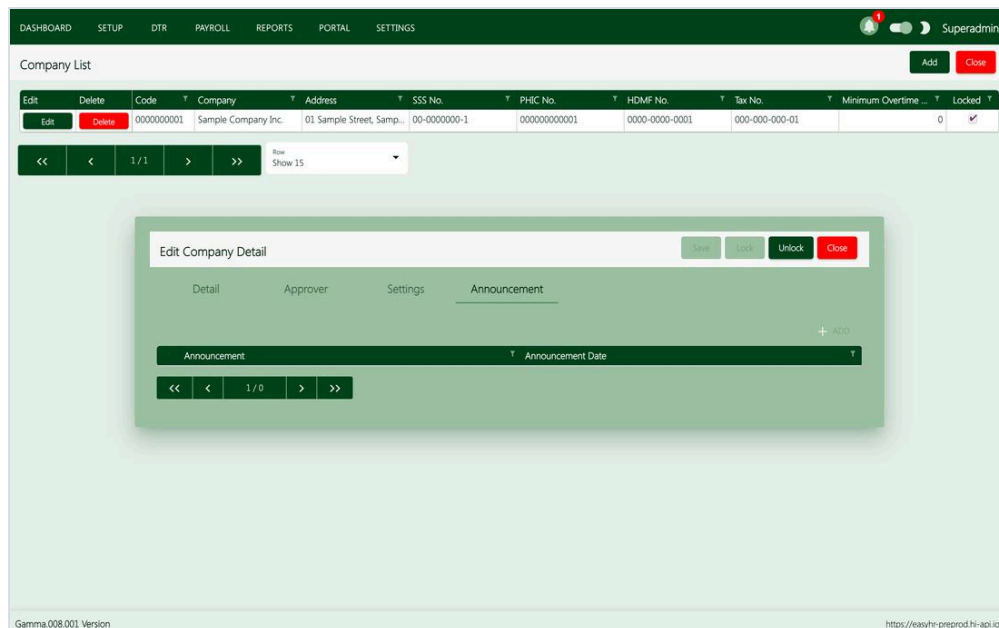
Company — Settings tab: how each kind of pay is treated

This tab has no columns. It is a set of tick boxes:

- 25 tick boxes for how pay is treated, for example whether it is taxable and whether it is shown on the payslip.
- **13th month settings:** seven tick boxes — Rest day Pay, Overtime Pay, Special Holiday Pay, Regular Holiday Pay, and Absent, Late and Undertime Deduction.

- For the superadmin only: four choices — **SSS Calculation Method**, **HDMF Calculation Method**, **PHIC Calculation Method** and **Mandatory Amount Basis**.

## ANNOUNCEMENT



Company — Announcement tab

**Columns:** Edit Delete Announcement Announcement Date

**ADD opens:** Announcement Announcement Date

## 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. A locked company cannot be deleted either — unlock it first. A company that still has lines on its Announcement or Approver tab cannot be deleted; delete those lines first. A company that employees, users or transactions refer to cannot be deleted either. The screen tells you which of these applies.

## 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

DASHBOARD
SETUP
DTR
PAYROLL
REPORTS
PORTAL
SETTINGS

Superadmin

Employee List

Add
CSV
Import
Close

Payroll Group
PAYROLL GROUP 01

| Edit                 | Delete                 | Code       | ID       | Biometric ID | Full Name            | Company             | Branch    | Position        | Address                 | Contact No.   | Mobile No.    |
|----------------------|------------------------|------------|----------|--------------|----------------------|---------------------|-----------|-----------------|-------------------------|---------------|---------------|
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000034 | 2023112  |              | DELA CRUZ, Employ... | Sample Company Inc. | Branch 05 | Delivery Helper | 02 Sample Street, Sa... | 0900-000-0001 | NA            |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000023 | 2023103  | 2023103      | DELA CRUZ, Employ... | Sample Company Inc. | Branch 05 | Stock Man       | 03 Sample Street, Sa... | 0900-000-0002 | NA            |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000038 | 20000002 | 20000002     | DELA CRUZ, Employ... | Sample Company Inc. | Branch 05 | Primary Driver  | 04 Sample Street, Sa... |               | 0900-000-0000 |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000037 | 2023102  | 2023102      | DELA CRUZ, Employ... | Sample Company Inc. | Branch 05 | Delivery Driver | 05 Sample Street, Sa... | 0900-000-0004 | NA            |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000041 | 2023114  | 2023114      | DELA CRUZ, Employ... | Sample Company Inc. | Branch 05 | Primary Driver  | NA                      | 0900-000-0005 | NA            |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000033 | 2023108  | 2023108      | DELA CRUZ, Employ... | Sample Company Inc. | Branch 05 | Maintenance     | 06 Sample Street, Sa... | 0900-000-0006 | NA            |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000022 | 2023117  | 2023117      | DELA CRUZ, Employ... | Sample Company Inc. | Branch 05 | Delivery Helper | 07 Sample Street, Sa... | 0900-000-0007 | NA            |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000028 | 2023101  | 2023101      | DELA CRUZ, Employ... | Sample Company Inc. | Branch 05 | Store Attendant | 08 Sample Street, Sa... | 0900-000-0008 | NA            |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000047 | 2023107  | 2023107      | DELA CRUZ, Employ... | Sample Company Inc. | Branch 05 | Maintenance     | 09 Sample Street, Sa... | 0900-000-0009 | NA            |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000061 | 20231019 | 20231019     | DELA CRUZ, Employ... | Sample Company Inc. | Branch 05 | Primary Driver  | 10 Sample Street, Sa... | 0900-000-0010 | NA            |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000053 | 2023118  | 2023118      | DELA CRUZ, Employ... | Sample Company Inc. | Branch 05 | Store Attendant | 11 Sample Street, Sa... | 0900-000-0011 | NA            |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000026 | 2023105  | 2023105      | DELA CRUZ, Employ... | Sample Company Inc. | Branch 05 | Delivery Helper | 12 Sample Street, Sa... | 0900-000-0012 | NA            |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000043 | 2023115  | 2023115      | DELA CRUZ, Employ... | Sample Company Inc. | Branch 05 | Stock Man       | NA                      | NA            | NA            |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000035 | 2023111  | 2023111      | DELA CRUZ, Employ... | Sample Company Inc. | Branch 05 | Delivery Helper | 13 Sample Street, Sa... | 0900-000-0013 | NA            |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000046 | 20000005 | 20000005     | DELA CRUZ, Employ... | Sample Company Inc. | Branch 05 | Delivery Helper | 14 Sample Street, Sa... |               | 0900-000-0014 |

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Row Show 15

Gamma.008.001 Version
<https://easyhr-preprod.hi-ajp.com>

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. You can choose only the payroll groups assigned to your user account (the Payroll Group tab in 2.9 Users).
3. Click **Edit** on a row to open the record, or **Add** to create one. Add saves a new employee straight away, named “NA” with the next code, and fills Position, City and similar boxes with the first value in each list. Set the name with **Edit Name** and correct every box before you lock the record. If you do not need the new employee after all, delete it from the list (see the note on deleting below).
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**. Lock saves what you entered and then locks the record, so you do not have to click Save first. While the record is locked, Save, Lock, Edit Name, Link Username, the photo buttons and the Add, Edit and Delete buttons on every tab are not available. To change it later, click **Unlock**, make the change, then click **Lock**.

## COLUMNS ON THIS SCREEN

Edit

Delete

Code

ID

Biometric ID

Full Name

Company

Branch

Position

Address

Contact No.

Mobile No.

Email Address

Remarks

Locked

## 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>`.

The screenshot shows the 'Employee Detail' form. The top navigation bar includes 'DASHBOARD', 'SETUP', 'DTR', 'PAYROLL', 'REPORTS', 'PORTAL', and 'SETTINGS'. The user is logged in as 'Superadmin'. The form has tabs for 'General', 'Payroll', 'HR', 'Other Income', 'Memo', 'Change History', 'Shift', 'Family and Contacts', and 'Educational/Work History'. The 'General' tab is active, showing fields for Employee Code, ID Number, Biometric ID Number, Company, Branch, Position, Payroll Group, Contact Tel No., Contact Mobile No., Username, Address, City, Zip Code, Date Of Birth, Place Of Birth, Religion, Email Address, Work Address 1, Work Address 2, Civil Status, Sex, Citizenship, Height (cm), Weight (kg), and BloodType. The form is currently on the General tab. At the bottom, it shows 'Created By: Administrator', 'Created DateTime: Oct 24 2024 11:13AM', 'Updated By: Administrator', and 'Updated DateTime: Apr 5 2026 2:29PM'.

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 Upload Photo Edit Name Link Username

- **Upload Photo:** first click **Choose File** and pick the picture, then click Upload Photo.
- **Edit Name:** opens a dialog with Last Name, First Name, Middle Name and Extension Name. The list shows the name as "LAST, First M."
- **Link Username:** click ▼ to open the User List, click **Pick** on the user, then click Link Username. The link is stored only when you click Lock (or Save).

## PAYROLL

The screenshot shows the 'Employee Detail' form in the 'Payroll' tab. The form is divided into several sections:

- Employee Information:** Includes fields for Employee Code (0000000034), ID Number (2023112), Biometric ID Number (2023112), Company (Sample Company Inc.), Branch (Branch 05), Position (Delivery Helper), Payroll Group (PAYROLL GROUP 01), Contact Tel No. (0900-000-0001), and Contact Mobile No. (NA). There is a 'photo removed' placeholder and a 'Choose File' button.
- Payroll Rates:** A table with columns for Rate Type, Rate, and other details.
 

| Rate Type         | Rate      | Other Details                                                                                              |
|-------------------|-----------|------------------------------------------------------------------------------------------------------------|
| Hourly Rate       | 67.79     | Account, Mode Of Payment, ATM account No.                                                                  |
| Monthly Rate      | 34,100.00 | Late Hourly Rate, SSSNumber, HDMFNumber, TIN, Cost Of Living Allowance                                     |
| Payroll Rate      | 7,050.00  | Under time/hourly Rate, SSS Computation Type, HDMF Computation Type, Tax Exemption, Is Minimum Wage Earner |
| Daily Rate        | 542.31    | Overtime Hourly Rate, SSS Add On Amount, HDMF Add On Amount, Tax Table, Branch Code                        |
| Absent Daily Rate | 542.31    | Night Differential Rate, Number Of Working Days, Additional Allowance, PHICNumber, Tax Add On Amount       |
- Footer:** Created By: Administrator, Created DateTime: Oct 24 2024 11:13AM, Updated By: Administrator, Updated DateTime: Apr 5 2026 2:29PM. Version: Gamma.008.001.

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, Undertime Hourly Rate, Daily Rate, Overtime Hourly Rate, Absent Daily Rate, Night Differential Rate, Number Of Working Days, Account, Mode Of Payment, ATM Account 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, Is Minimum Wage Earner

**Payroll Rate** is filled in from the Monthly Rate (for example, a Monthly Rate of 20,000 gives a Payroll Rate of 10,000).

HR

DASHBOARDSETUPDTRPAYROLLREPORTSPORTALSETTINGS

1Superadmin

SaveLockUnlockClose

Employee Detail

photo removed

Choose FileNo file chosen

Upload Photo

Employee Code0000000034

Edit Name

Employee Santos DELA CRUZ NA

PositionDelivery Helper

Payroll GroupPAYROLL GROUP 01

Contact Tel No.0900-000-0001

Contact Mobile No.NA

ID Number2023112

Biometric ID Number2023112

CompanySample Company Inc.

BranchBranch 05

Username:sampleuser01

Link Username

<GeneralPayrollHROther IncomeMemoChange HistoryShiftFamily and ContactsEducational/Work His>

Employee StatusActive

Shift CodeBAM - SPM SUNDAY RD

Approver's NameArfonne Limbagan

Date Hired10/2/2023

Date Regular1/1/1991

Date Resigned1/1/1991

DivisionNA

DepartmentAdmin

Created By:Administrator

Created DateTime:Oct 24 2024 11:13AM

Updated By:Administrator

Updated DateTime:Apr 5 2026 2:29PM

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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

DASHBOARDSETUPDTRPAYROLLREPORTSPORTALSETTINGS

1Superadmin

SaveLockUnlockClose

Employee Detail

photo removed

Choose FileNo file chosen

Upload Photo

Employee Code0000000034

Edit Name

Employee Santos DELA CRUZ NA

PositionDelivery Helper

Payroll GroupPAYROLL GROUP 01

Contact Tel No.0900-000-0001

Contact Mobile No.NA

ID Number2023112

Biometric ID Number2023112

CompanySample Company Inc.

BranchBranch 05

Username:sampleuser01

Link Username

<GeneralPayrollHROther IncomeMemoChange HistoryShiftFamily and ContactsEducational/Work His>

Shift

BAM - SPM SUNDAY RD

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Created By:Administrator

Created DateTime:Oct 24 2024 11:13AM

Updated By:Administrator

Updated DateTime:Apr 5 2026 2:29PM

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Employee — Shift tab

- Columns:
- Shift

## FAMILY AND CONTACTS

Employee — Family and Contacts tab

**Columns:** FullName Contact Address Relation EC

### THE OTHER TABS

On each tab, **ADD** opens a dialog with these boxes:

- **Other Income:** Other Income, Amount, IsActive, IsWorkRequired, IsCompleteAttendance.
- **Memo:** Date, Attachment Type, URL or file, Particulars.
- **Shift:** Shift.
- **Family and Contacts:** Full Name, Contact Mobile No., Address, Relation, IsEmergencyContact.
- **Educational/Work History:** Company/School, Date Start, Date End, Position/Course, Background Type, Address. The dates are required.
- **Training/Seminar:** Trainings/Seminar, Seminar Date. The date is required.
- **Previous Employer:** the previous employer's name, TIN, period, amounts, and SSS, PHIC and HDMF. These are saved when you click Lock.

**Change History** fills itself. Each time the record is locked, every changed field is listed with its old and new value, who changed it and when.

### 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 is read by its column names (41 columns, in any order). If a column is missing, the import stops with "Please import the correct file format and try again." Click **Template** on the import dialog to download a blank file (Employee\_201.xlsx).

**CSV** exports every page of the chosen payroll group, not only the page you are looking at. The headings are the field names, not the column headings on the screen.

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.

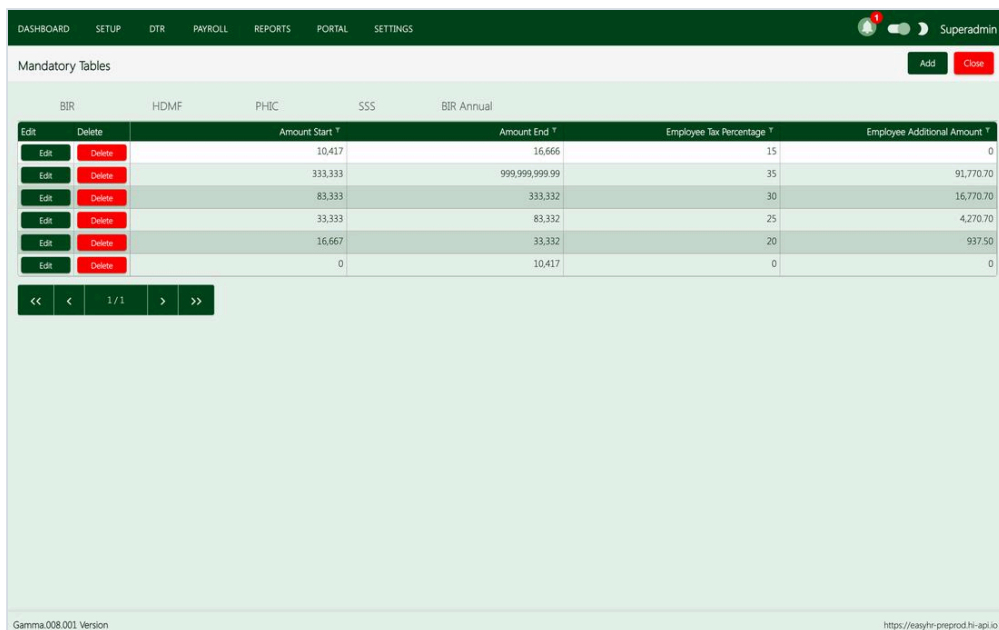
An employee can be deleted only while the record is unlocked and has never been used: no change history, memos, leave credits, change shift, DTR, overtime, loans or payroll lines. This is the case for an employee created by Add and closed without changes. Otherwise the screen says “Cannot delete. Employee has existing transactions.” (or that the record is locked). There is no “inactive” mark. For an employee who has left, enter the **Date Resigned** on the HR tab.

## 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



|      |        | BIR                       | HDMF                    | PHIC                                 | SSS                                     | BIR Annual |           |
|------|--------|---------------------------|-------------------------|--------------------------------------|-----------------------------------------|------------|-----------|
| Edit | Delete | Amount Start <sup>†</sup> | Amount End <sup>†</sup> | Employee Tax Percentage <sup>†</sup> | Employee Additional Amount <sup>†</sup> |            |           |
| Edit | Delete | 10,417                    | 16,666                  | 15                                   |                                         |            | 0         |
| Edit | Delete | 333,333                   | 999,999,999.99          | 35                                   |                                         |            | 91,770.70 |
| Edit | Delete | 83,333                    | 333,332                 | 30                                   |                                         |            | 16,770.70 |
| Edit | Delete | 33,333                    | 83,332                  | 25                                   |                                         |            | 4,270.70  |
| Edit | Delete | 16,667                    | 33,332                  | 20                                   |                                         |            | 937.50    |
| Edit | Delete | 0                         | 10,417                  | 0                                    |                                         |            | 0         |

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**. The system refuses a bracket whose Amount Start is negative or greater than its Amount End, and a percentage below 0 or above 100, and tells you which.

COLUMNS ON THIS SCREEN

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

BUTTONS

- Add
- Close
- Edit
- Delete

SSS

DASHBOARDSETUPDTRPAYROLLREPORTSPORTALSETTINGS

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Mandatory Tables

BIR

HDMF

PHIC

SSS

BIR Annual

| Edit            | Delete            | Amount Start | Amount End   | Employee Contribution Value | Employer Contribution Value | Employer EC Value | Remarks |
|-----------------|-------------------|--------------|--------------|-----------------------------|-----------------------------|-------------------|---------|
| <div>Edit</div> | <div>Delete</div> | 34,750       | 9,999,999.99 | 1,750                       | 3,500                       | 30.0              |         |
| <div>Edit</div> | <div>Delete</div> | 34,250       | 34,749.99    | 1,725                       | 3,450                       | 30.0              |         |
| <div>Edit</div> | <div>Delete</div> | 33,750       | 34,249.99    | 1,700                       | 3,400                       | 30.0              |         |
| <div>Edit</div> | <div>Delete</div> | 33,250       | 33,749.99    | 1,675                       | 3,350                       | 30.0              |         |
| <div>Edit</div> | <div>Delete</div> | 32,750       | 33,249.99    | 1,650                       | 3,300                       | 30.0              |         |
| <div>Edit</div> | <div>Delete</div> | 32,250       | 32,749.99    | 1,625                       | 3,250                       | 30.0              |         |
| <div>Edit</div> | <div>Delete</div> | 31,750       | 32,249.99    | 1,600                       | 3,200                       | 30.0              |         |
| <div>Edit</div> | <div>Delete</div> | 31,250       | 31,749.99    | 1,575                       | 3,150                       | 30.0              |         |
| <div>Edit</div> | <div>Delete</div> | 30,750       | 31,249.99    | 1,550                       | 3,100                       | 30.0              |         |
| <div>Edit</div> | <div>Delete</div> | 30,250       | 30,749.99    | 1,525                       | 3,050                       | 30.0              |         |
| <div>Edit</div> | <div>Delete</div> | 29,750       | 30,249.99    | 1,500                       | 3,000                       | 30.0              |         |
| <div>Edit</div> | <div>Delete</div> | 29,250       | 29,749.99    | 1,475                       | 2,950                       | 30.0              |         |
| <div>Edit</div> | <div>Delete</div> | 28,750       | 29,249.99    | 1,450                       | 2,900                       | 30.0              |         |
| <div>Edit</div> | <div>Delete</div> | 28,250       | 28,749.99    | 1,425                       | 2,850                       | 30.0              |         |
| <div>Edit</div> | <div>Delete</div> | 27,750       | 28,249.99    | 1,400                       | 2,800                       | 30.0              |         |

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Mandatory Tables — SSS contribution table

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

PHIC

DASHBOARDSETUPDTRPAYROLLREPORTSPORTALSETTINGS

Superadmin

Mandatory Tables

BIR

HDMF

PHIC

SSS

BIR Annual

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

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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

DASHBOARD

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PAYROLL

REPORTS

PORTAL

SETTINGS

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Superadmin

Mandatory Tables

AddClose

BIR

HDMF

PHIC

SSS

BIR Annual

| Edit | Delete  | Amount Start | Amount End | Employee Contribution P. | Employee Contribution P. | Employee Contribution V. | Employee Contribution V. | Remarks |
|------|---------|--------------|------------|--------------------------|--------------------------|--------------------------|--------------------------|---------|
| 1    | 999,999 | 2            | 2          | 0                        | 0                        | NA                       |                          |         |

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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.

Note: The payroll uses a bracket only when the amount lies between its Amount Start and Amount End. The shipped BIR table has gaps of a few centavos between brackets (for example 16,666.01 to 16,666.99), and the shipped SSS table has one between 6,249.99 and 6,260.00. An amount that falls in a gap gets 0 withholding tax or 0 SSS. Check any such employee before you lock the payroll.

Note: On the PHIC dialog the fourth and sixth boxes are labelled "Employee Contribution Percentage" and "Employee Contribution Value" but hold the **Employer** percentage and value.

## 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

| Edit | Delete | Code       | Shift                  | Particulars | Locked |
|------|--------|------------|------------------------|-------------|--------|
| Edit | Delete | 0000000009 | 8AM - 5PM SUNDAY RD    | 8AM - 5PM   | ✓      |
| Edit | Delete | 0000000007 | 9AM - 6PM SATURDAY RD  | 9AM - 6PM   | ✓      |
| Edit | Delete | 0000000006 | 9AM - 6PM FRIDAY RD    | 9AM - 6PM   | ✓      |
| Edit | Delete | 0000000005 | 9AM - 6PM THURSDAY RD  | 9AM - 6PM   | ✓      |
| Edit | Delete | 0000000004 | 9AM - 6PM WEDNESDAY RD | 9AM - 6PM   | ✓      |
| Edit | Delete | 0000000003 | 9AM - 6PM TUESDAY RD   | 9AM - 6PM   | ✓      |
| Edit | Delete | 0000000002 | 9AM - 6PM MONDAY RD    | 9AM - 6PM   | ✓      |
| Edit | Delete | 0000000001 | 9AM - 6PM SUNDAY RD    | 9AM - 6PM   | ✓      |

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**. A shift needs a name (“Please enter the Shift name.” otherwise). While a shift is locked its shift lines cannot be added, changed or deleted; click **Unlock** first.

## 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 Code Detail

ShiftCode: 000000009 Shift: 8AM - 5PM SUNDAY RD

Particulars: 8AM - 5PM

| Day       | IN1     | OUT1 | IN2 | OUT2    | RD | Hrs | BH | ND | FLEX | FMIN | Remarks |
|-----------|---------|------|-----|---------|----|-----|----|----|------|------|---------|
| SUNDAY    | 8:00 AM |      |     | 5:00 PM |    | 8   | 1  | 0  | 1    | 0    | NA      |
| SATURDAY  | 8:00 AM |      |     | 5:00 PM |    | 8   | 1  | 0  | 1    | 0    | NA      |
| FRIDAY    | 8:00 AM |      |     | 5:00 PM |    | 8   | 1  | 0  | 1    | 0    | NA      |
| THURSDAY  | 8:00 AM |      |     | 5:00 PM |    | 8   | 1  | 0  | 1    | 0    | NA      |
| WEDNESDAY | 8:00 AM |      |     | 5:00 PM |    | 8   | 1  | 0  | 1    | 0    | NA      |
| TUESDAY   | 8:00 AM |      |     | 5:00 PM |    | 8   | 1  | 0  | 1    | 0    | NA      |
| MONDAY    | 8:00 AM |      |     | 5:00 PM |    | 8   | 1  | 0  | 1    | 0    | NA      |

Created By: DELA CRUZ, Employee 87 Created DateTime: Oct 29 2024 3:15PM Updated By: Administrator Updated DateTime: Jan 18 2025 5:55PM

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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.

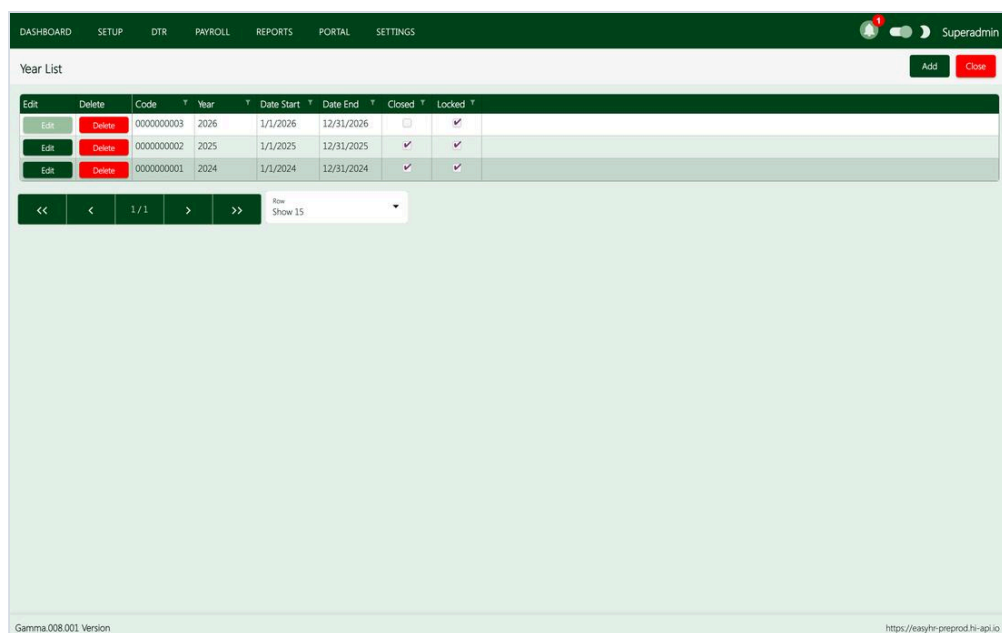
Changing a shift affects every employee assigned to it, including days that have not yet been processed into a DTR.

## 2.5 Year

The payroll year. Each year record holds the holiday calendar — which dates are holidays, of which type, and in which branches — 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** an existing one (click **Unlock** first if it is locked). Add saves a new year straight away, with Year “NA” and the dates 1 January to 31 December of this year. Type the year (for example 2027) in **Year**, correct **DateStart** and **DateEnd**, and click **Save**.
3. On the **Year Date** tab enter the holidays. Holidays are set per branch. **ADD** opens “Add Year Date to Branches”: enter the **Date**, choose the **Date Type** — REGULAR HOLIDAY, SPECIAL HOLIDAY, DOUBLE REGULAR HOLIDAY, DOUBLE SPECIAL HOLIDAY or REGULAR WORKING DAY — tick the branches it applies to (you can tick several), and add any **Remarks**. A holiday has no effect on the DTR of employees in a branch that is not ticked. The date must fall inside the year's DateStart–DateEnd, and a branch can have only one holiday for a date.
4. On the **Year Leave Credits** tab enter each employee's leave credits for the year. Each line is one employee and one leave type. ADD opens: **Employee** (click ▼ to open the employee list, then **Pick**), **Leave Credits** (days), **Leave Type** (Sick Leave, Vacation Leave, Official Business Trip or Service Incentive Leave) and **Remarks**. Add a separate line for each leave type. Leave Type is required, and an employee can have only one line per leave type in a year; editing a line keeps its Leave Type and Remarks.
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>`.

DASHBOARD
SETUP
DTR
PAYROLL
REPORTS
PORTAL
SETTINGS
Superadmin

Year Code

000000003

Year

2026

Date Start

1/1/2026

Date End

12/31/2026

Close

Year Date

Year Leave Credits

ADD

| Date      | Branch    | Date Type       | Remarks                                                         |
|-----------|-----------|-----------------|-----------------------------------------------------------------|
| 8/6/2026  | Branch 04 | SPECIAL HOLIDAY | CEBU CHARTER DAY PROVINCE                                       |
| 8/31/2026 | Branch 05 | REGULAR HOLIDAY | NATIONAL HEROES DAY                                             |
| 8/31/2026 | Branch 04 | REGULAR HOLIDAY | NATIONAL HEROES DAY                                             |
| 8/31/2026 | Branch 03 | REGULAR HOLIDAY | NATIONAL HEROES DAY                                             |
| 8/31/2026 | Branch 02 | REGULAR HOLIDAY | NATIONAL HEROES DAY                                             |
| 8/31/2026 | Branch 01 | REGULAR HOLIDAY | NATIONAL HEROES DAY                                             |
| 8/21/2026 | Branch 05 | SPECIAL HOLIDAY | NINYO AQUINO DAY                                                |
| 8/21/2026 | Branch 04 | SPECIAL HOLIDAY | NINYO AQUINO DAY                                                |
| 8/21/2026 | Branch 03 | SPECIAL HOLIDAY | NINYO AQUINO DAY                                                |
| 8/21/2026 | Branch 02 | SPECIAL HOLIDAY | NINYO AQUINO DAY                                                |
| 8/21/2026 | Branch 01 | SPECIAL HOLIDAY | NINYO AQUINO DAY                                                |
| 8/6/2026  | Branch 05 | SPECIAL HOLIDAY | CEBU CHARTER DAY (CEBU PROVINCE INCLUDING CEBU CITY, MANDAUE... |
| 8/6/2026  | Branch 03 | SPECIAL HOLIDAY | CEBU CHARTER DAY (CEBU PROVINCE INCLUDING CEBU CITY, MANDAUE... |
| 8/6/2026  | Branch 02 | SPECIAL HOLIDAY | CEBU CHARTER DAY (CEBU PROVINCE INCLUDING CEBU CITY, MANDAUE... |
| 8/6/2026  | Branch 01 | SPECIAL HOLIDAY | CEBU CHARTER DAY (CEBU PROVINCE INCLUDING CEBU CITY, MANDAUE... |

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Created By:

Administrator

Created DateTime:

1/3/2026

Updated By:

Super Admin

Updated DateTime:

8/25/2026

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Year — the record

**Tabs:** Year Date Year Leave Credits

**Fields:** YearCode Year DateStart DateEnd Close

Tick **Close** when a year is finished. A closed year is no longer offered when you choose a year for a DTR, a payroll, a leave application and so on. Only the DTR view in the portal still shows it.

**Buttons:** Save Lock Unlock Close ADD

**ADD** is at the right end of the tabs. It adds a line to the tab that is open (Year Date or Year Leave Credits). It is not available while the year is locked.

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

The holidays are copied into the DTR when the DTR lines are created: each line gets the Date Type for the employee's branch and that date. Leave applications draw against the credits recorded here.

### WORTH KNOWING

**Keep the current year locked.** While a year is unlocked, it is not offered when you choose a year on the DTR, payroll and leave application screens. To add holidays or leave credits, click **Unlock**, add the lines, then click **Lock** (while the year is locked, ADD, Edit and Delete are not available).

A holiday added after the DTR lines were created does not change the DTR, even when you click Compute again — the Date Type already on each DTR line is used. Create the DTR lines again, or correct the Date Type on the line by hand.

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

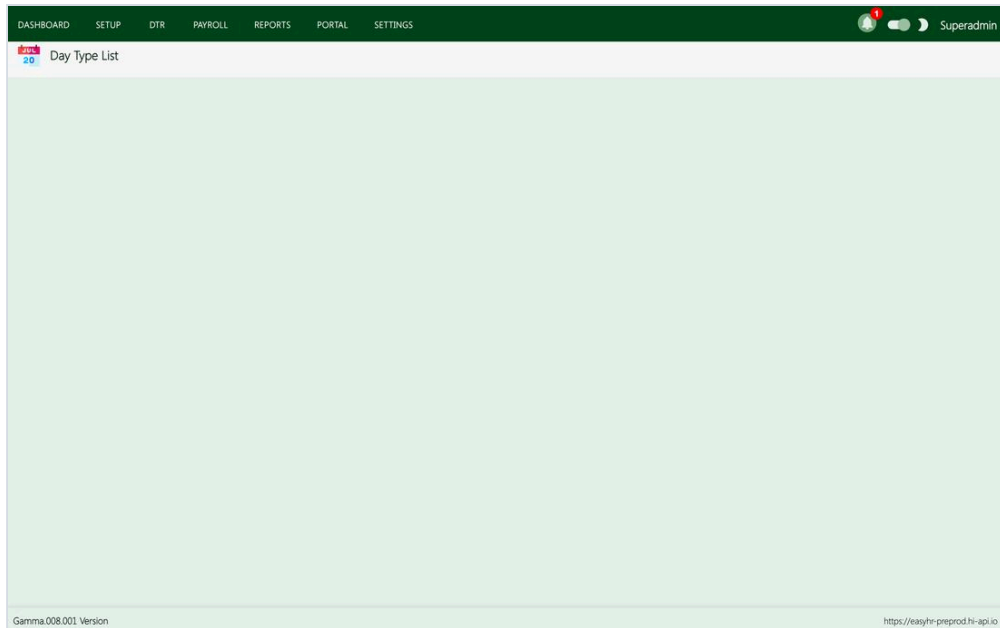
## 2.6 Day Type

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.

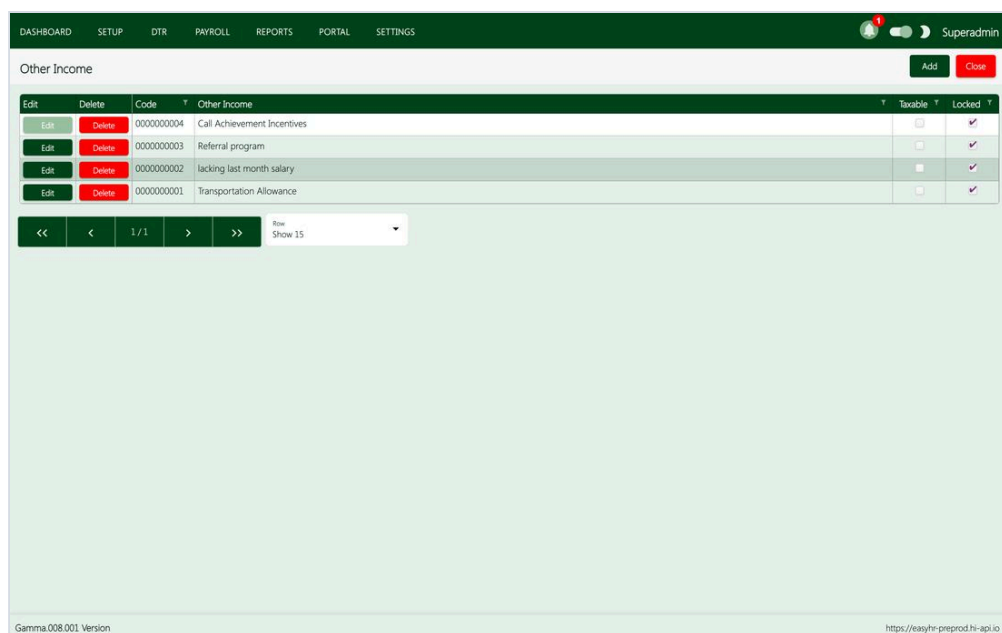
The menu entry is not shown in this environment either.

## 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. The name cannot be empty ("Please enter the Other Income name.").
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.

An income type that employees or payroll lines already use cannot be deleted; the screen says how many records use it.

## 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

| Edit | Delete | Code       | Other Deduction              | Amount | IsLoan                   | Locked                              |
|------|--------|------------|------------------------------|--------|--------------------------|-------------------------------------|
| Edit | Delete | 0000000011 | DAMAGED COMPANY'S PROPERTY   | 500    | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | Delete | 0000000010 | HMO Dependents               | 755.29 | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | Delete | 0000000009 | advance partial payroll      | 5,000  | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | Delete | 0000000008 |                              | 0      | <input type="checkbox"/> | <input type="checkbox"/>            |
| Edit | Delete | 0000000007 | Overpayment                  | 54.27  | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | Delete | 0000000006 | SSS Loan                     | 553.74 | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | Delete | 0000000005 | Damaged Stocks               | 62     | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | Delete | 0000000004 | Other Deductions - Container | 100    | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | Delete | 0000000003 | Other Deductions - Container | 15     | <input type="checkbox"/> | <input type="checkbox"/>            |
| Edit | Delete | 0000000002 | HMO                          | 500    | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | Delete | 0000000001 | Loan                         | 0      | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

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. The name cannot be empty ("Please enter the Other Deduction name.") and the amount cannot be negative.
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.

## WORTH KNOWING

A deduction type that payroll lines or loans already use cannot be deleted; the screen says how many use it. A locked type cannot be changed or deleted; unlock it first.

## 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

| Edit | FullName               | Username     | Created By    | Created Date | Updated By    | Updated Date | Locked | Active |
|------|------------------------|--------------|---------------|--------------|---------------|--------------|--------|--------|
| Edit | DELA CRUZ, Employee 21 | sampleuser02 | Administrator | 9/5/2025     | Administrator | 9/5/2025     | ✓      | ✓      |
| Edit | DELA CRUZ, Employee 22 | sampleuser03 | Administrator | 9/5/2025     | Administrator | 9/5/2025     | ✓      | ✓      |
| Edit | DELA CRUZ, Employee 23 | sampleuser04 | Administrator | 8/28/2025    | Administrator | 8/28/2025    | ✓      | ✓      |
| Edit | DELA CRUZ, Employee 24 | sampleuser05 | Administrator | 8/28/2025    | Administrator | 8/28/2025    | ✓      | ✓      |
| Edit | DELA CRUZ, Employee 25 | sampleuser06 | Administrator | 8/28/2025    | Administrator | 8/28/2025    | ✓      | ✓      |
| Edit | DELA CRUZ, Employee 26 | sampleuser07 | Administrator | 8/28/2025    | Administrator | 8/28/2025    | ✓      | ✓      |
| Edit | DELA CRUZ, Employee 27 | sampleuser08 | Administrator | 8/28/2025    | Administrator | 8/28/2025    | ✓      | ✓      |
| Edit | DELA CRUZ, Employee 28 | sampleuser09 | Administrator | 8/27/2025    | Administrator | 8/27/2025    | ✓      | ✓      |
| Edit | DELA CRUZ, Employee 29 | sampleuser10 | Administrator | 8/27/2025    | Administrator | 8/27/2025    | ✓      | ✓      |
| Edit | DELA CRUZ, Employee 30 | sampleuser11 | Administrator | 8/27/2025    | Administrator | 8/27/2025    | ✓      | ✓      |
| Edit | DELA CRUZ, Employee 31 | sampleuser12 | Administrator | 8/27/2025    | Administrator | 8/27/2025    | ✓      | ✓      |
| Edit | DELA CRUZ, Employee 32 | sampleuser13 | Administrator | 8/27/2025    | Administrator | 8/27/2025    | ✓      | ✓      |
| Edit | DELA CRUZ, Employee 33 | sampleuser14 | Administrator | 8/27/2025    | Administrator | 8/27/2025    | ✓      | ✓      |
| Edit | DELA CRUZ, Employee 34 | sampleuser15 | Administrator | 8/27/2025    | Administrator | 8/27/2025    | ✓      | ✓      |
| Edit | DELA CRUZ, Employee 35 | sampleuser16 | Administrator | 8/27/2025    | Administrator | 8/27/2025    | ✓      | ✓      |

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. If the account is locked, click **Unlock** first (Add is greyed out while it is locked). On the **User Rights** tab click **Add**, choose the module and tick what the user may do — open, add, edit, delete, lock, unlock and print.
5. Click **Save**, then **Lock**. A new account is created active (Is Active ticked). While an account is locked, its name, company, Is Active and rights cannot be changed; click **Unlock** first.

## 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> .

Dashboard: DASHBOARD, SETUP, DTR, PAYROLL, REPORTS, PORTAL, SETTINGS

Superadmin

User Detail

Full Name: DELA CRUZ, Employee 21 | Username: sampleuser02 | Password: \*\*\*\*\* | Change Password

Sample Company Inc. | Is Active: ☒

User Rights | Payroll Group | Copy Rights | Add

| Module          | Can Open                            | Can Add                             | Can Edit                            | Can Lock                            | Can Unlock                          | Can Delete                          | Can Print                           |
|-----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Employee Portal | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Created By: Administrator | Created DateTime: Sep 5 2025 10:37AM | Updated By: Administrator | Updated DateTime: Sep 5 2025 10:38AM

Gamma.008.001 Version | https://easyhr-preprod.hi-api.io

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

Dashboard: DASHBOARD, SETUP, DTR, PAYROLL, REPORTS, PORTAL, SETTINGS

Superadmin

User Detail

Full Name: DELA CRUZ, Employee 21 | Username: sampleuser02 | Password: \*\*\*\*\* | Change Password

Sample Company Inc. | Is Active: ☒

User Rights | Payroll Group | Copy Rights | Add

| Module          | Can Open                            | Can Add                             | Can Edit                            | Can Lock                            | Can Unlock                          | Can Delete                          | Can Print                           |
|-----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Employee Portal | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Created By: Administrator | Created DateTime: Sep 5 2025 10:37AM | Updated By: Administrator | Updated DateTime: Sep 5 2025 10:38AM

Gamma.008.001 Version | https://easyhr-preprod.hi-api.io

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. A change to a user's rights applies after that user signs in again.

## 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.

Some modules can be added only by the superadmin. Anyone else sees "You do not have permission to add this module."

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.

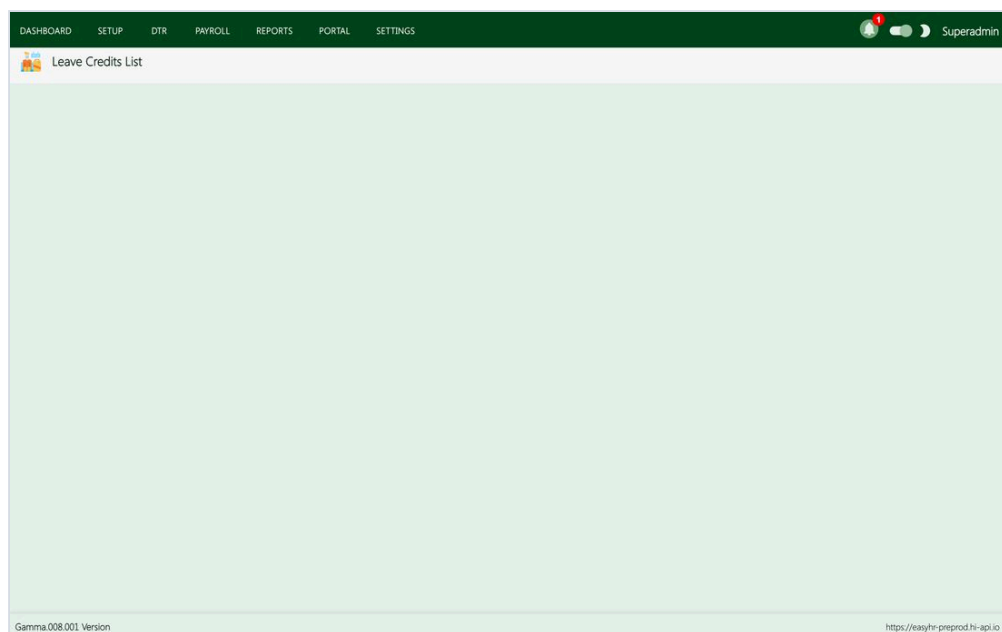
### 3.1 Leave Credits

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

| Edit | Delete | CS No.     | Date      | Year | Remarks | Prepared By   | Locked |
|------|--------|------------|-----------|------|---------|---------------|--------|
| Edit | Delete | 0000000228 | 8/20/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000223 | 8/5/2026  | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000218 | 7/20/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000217 | 7/16/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000211 | 7/4/2026  | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000210 | 6/30/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000205 | 6/20/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000200 | 6/5/2026  | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000194 | 5/20/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000189 | 5/5/2026  | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000188 | 4/25/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000183 | 4/20/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000176 | 4/6/2026  | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000171 | 3/20/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000165 | 3/5/2026  | 2026 | NA      | Administrator | ✓      |

Change Shift — the screen as it opens

### WHAT TO DO

1. Open **DTR → Change Shift**.
2. Choose the payroll group in the **Payroll Group** filter first, then click **Add**. The document is created for that group at once. On the detail screen the payroll group is shown in the heading and cannot be changed.
3. The three dates (document date, start date and end date) are filled with today's date. Change the start and end dates to the cut-off period, then click **Save**.
4. Add the lines with **Add** — employee, date, the shift actually worked, branch and **Approved** — or use **Import change shift** to load them from a file.
5. Review the applications the employees filed themselves. To approve one, click **Edit** on the line, tick **Approved** and click **Save**.
6. Click **Save**, then **Lock**.

Note: after you approve a line with **Edit**, check that the **Shift** on the line is still the shift the employee asked for. If it has changed, correct it before you lock the document.

## 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 Date Start Date End Prepared By Checked By Approved By Remarks

There are three dates: the date of the document, the start date and the end date of the period. On the screen they are labelled **Date**, **Date Start** and **Date End**, in that order. **Date End** cannot be earlier than **Date Start**, and you cannot shorten the period so that a line falls outside it — delete or move those lines first.

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

**Add** and **Import change shift** sit next to the line tab. **CSV** can be used at any time; **Unlock** can be used only after the document is locked. Once it is locked, **Save**, **Add**, **Import change shift** and the **Edit / Delete** buttons on the lines disappear.

## 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

**Add** opens a window with these fields:

- **Employee** — the list (▼) shows only the employees of this payroll group.
- **Date** — only dates inside the period can be chosen. The window opens with today's date, so change it.
- **Shift** — only locked shifts are listed.
- **Branch**.
- **Approved** — ticked when the window opens. Tick it for the lines you want to apply.
- **Remarks**.

A line is refused, with the reason on the screen, if the employee is not in this payroll group ("Employee does not belong to the payroll group of this change shift.") or already has a line on the same date ("This employee already has a change shift on this date."). If you leave **Remarks** empty it is saved as "NA". A locked document refuses every change ("Change shift is lock!").

Note: at present the DTR also applies change shift lines whose **Approved** box is not ticked. To stop a line being applied, delete it; do not rely on unticking **Approved**.

## IMPORTING LINES

1. Click **Import change shift**, then **Template** to download the template. Its columns are `EmployeeId`, `EmployeeName`, `ShiftDate`, `ShiftCode`, `Shift`, `Branch` and `Remarks`.
2. Enter the employee number in `EmployeeId` and the shift code in `ShiftCode`. Enter the shift code as text, with its leading zeros (for example `0000000002`).
3. Import the file. The file has no **Approved** column; every line it loads is approved.
4. The file is checked as a whole. If any row is wrong, nothing is imported and a message lists the rows with the reason (for example "Employee ID ... not found in the payroll group of this change shift.", "shift code '...' not found.", "date out of range.", "branch '...' not found.", "the employee already has a change shift on this date."). Correct the file and import it again.

## WHAT YOU SHOULD SEE

The approved lines of the change shift document selected on the DTR are applied when the DTR for the same period is computed. The DTR reads the lines again each time you click **Compute**, so after you approve or change a line, compute the DTR again.

## WORTH KNOWING

Lock the change shift document **before** you prepare the DTR for that period. This is required: the DTR's **Change Shift** list shows only locked documents.

An employee can have only one line for a day in a document; a second line is refused.

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

To delete a document, unlock it first; while it is locked, **Delete** shows "Change shift is lock!". Deleting a document also deletes its lines. A document that a DTR uses cannot be deleted; the screen says "This change shift is used by DTR No. ...". A document made by a published roster (chapter 9) cannot be changed here either.

### 3.3 Leave Application

Leave applications for one cut-off period. An application filed in the portal is added to the unlocked leave application document for that period. The approver approves each line here by ticking **Approve**, and the DTR turns approved leave into paid or unpaid days according to the **With Pay** tick on each line.

#### HOW TO GET THERE

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

| Edit | Delete | LA No.     | Date      | Year | Remarks | Prepared By   | Locked |
|------|--------|------------|-----------|------|---------|---------------|--------|
| Edit | Delete | 0000000231 | 8/20/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000226 | 8/5/2026  | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000221 | 7/20/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000220 | 7/16/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000215 | 7/4/2026  | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000213 | 6/30/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000204 | 6/20/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000198 | 6/5/2026  | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000193 | 5/20/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000192 | 5/5/2026  | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000191 | 4/25/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000184 | 4/20/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000177 | 4/6/2026  | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000170 | 3/20/2026 | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000169 | 3/5/2026  | 2026 | NA      | Administrator | ✓      |

Leave Application — the screen as it opens

#### WHAT TO DO

1. Open **DTR → Leave Application**.
2. Choose the payroll group in the **Payroll Group** filter first, then click **Add**. The application is saved at once for that group, with today's date and the remarks "NA". On the detail screen the payroll group cannot be changed. Set **Date Start** and **Date End** to the cut-off period and click **Save**.
3. Add the lines with **ADD**, one line per day: employee, date, **Leave Type**, **Half Day**, **With Pay**, **Approve** and remarks. The date must fall inside the period. Or approve the applications the employees filed themselves by ticking **Approve** on their lines.
4. Click **Save**, then **Lock**.

**Add** works only when the current year is locked and not closed under **SETUP → Year**; otherwise it shows "Year not found!". The **Year List** also shows only years that are locked and not closed.

#### 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 Prepared By Checked By Approved By Remarks

**Prepared By** cannot be changed. The LA No. and the payroll group are shown in the heading only.

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

**CSV** can be used at any time; **Unlock** only after the document is locked. Once the document is locked, the system refuses every change to it and its lines ("Leave application is lock!"); unlock it first.

**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

Only lines with **Approve** ticked go to the DTR. Only lines with **With Pay** ticked are paid. A line is refused, with the reason on the screen, if **Leave Type** is empty ("Leave type is required."), if the date is outside the period ("Date out of range") or if the employee already has a leave on that date ("This employee already has a leave on this date."). **Date End** cannot be earlier than **Date Start**, and you cannot shorten the period so that a line falls outside it. A document that a DTR uses cannot be deleted; the screen says "This leave application is used by DTR No. ...".

## WHAT YOU SHOULD SEE

Approved leave appears on the DTR for the same period. Lines with **With Pay** ticked are paid; the others are unpaid.

## WORTH KNOWING

Note: the system does not check the employee's remaining leave credits. A line with **With Pay** ticked is paid even when the balance has run out. Check the balance before you tick **With Pay**.

Lock this document before generating the DTR for the period. The DTR can use only one leave application, and only a locked one from the same payroll group.

To change a locked document: **Unlock**, make the change, **Lock** again, then compute the DTR again.

## 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

| Edit                 | Delete                 | OT No.s    | Date      | Year | Remarks | Prepared By   | Locked |
|----------------------|------------------------|------------|-----------|------|---------|---------------|--------|
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000238 | 8/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000233 | 8/5/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000228 | 7/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000227 | 7/16/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000222 | 7/4/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000220 | 6/30/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000215 | 6/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000210 | 6/5/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000204 | 5/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000198 | 5/5/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000197 | 4/25/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000192 | 4/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000185 | 4/6/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000180 | 3/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000174 | 3/5/2026  | 2026 | NA      | Administrator | ✓      |

Overtime Application — the screen as it opens

## WHAT TO DO

1. Open **DTR → Overtime Application**.
2. Choose the payroll group in the **Payroll Group** filter first, then click **Add**. The application is created for that group. On the detail screen the payroll group is shown in the heading and cannot be changed. **Date**, **Date Start** and **Date End** are filled with today's date; change the start and end dates to the cut-off period and click **Save**.
3. Add the lines with **ADD** — employee, date, hours, **Approve** — or approve what the employees filed by ticking **Approve** on their lines.

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 Prepared By Checked By Approved By Remarks

**Date** is the date of the application. The period is set by **Date Start** and **Date End**.

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

**CSV** can be used at any time; **Unlock** can be used only after the document is locked. Once it is locked, **Save**, **ADD** and the **Edit / Delete** buttons on the lines disappear.

#### 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

**ADD** opens a window with these fields:

- **Employee** — the list (▼) shows only the employees of this payroll group.

- **Date** — only dates inside the period can be chosen. The window opens with today's date, so change it.
- **OT Hours** — more than 0 and not more than 24 ("OT hours must be greater than 0 and not more than 24.").
- **Approve** — only lines with this ticked go to the DTR.
- **Remarks.**

A line is also refused, with the reason on the screen, if the employee is not in this payroll group ("Employee does not belong to the payroll group of this overtime application."), if the employee already has overtime on that date ("This employee already has overtime on this date.") or if the document is locked ("Overtime application is lock!"). **Date End** cannot be earlier than **Date Start**, and you cannot shorten the period so that a line falls outside it.

#### WHAT YOU SHOULD SEE

The DTR counts as overtime the smaller of two figures: the time logged after the end of the shift, and the approved hours. The approved hours are a ceiling, not an amount that is paid automatically. If the result is below the **Minimum Overtime Hours** in the company settings, it counts as 0. The overtime is paid at the overtime rates on the employee's payroll record.

#### WORTH KNOWING

Lock this document before generating the DTR for the period. This is required: the DTR's **Over Time** list shows only locked applications.

To delete an application, unlock it first; while it is locked, **Delete** shows "Overtime application is lock!". Deleting an application also deletes its lines. An application that a DTR uses cannot be deleted; the screen says "This overtime application is used by DTR No. ...".

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`

| Edit | Delete | DTR No. | Date      | Year | Date Start | Date End  | Remarks | Prepared By | Locked |
|------|--------|---------|-----------|------|------------|-----------|---------|-------------|--------|
| Edit | Delete | 252     | 8/20/2026 | 2026 | 8/1/2026   | 8/15/2026 | NA      | admin       | ✓      |
| Edit | Delete | 245     | 8/5/2026  | 2026 | 7/16/2026  | 7/31/2026 | NA      | admin       | ✓      |
| Edit | Delete | 242     | 7/20/2026 | 2026 | 7/1/2026   | 7/15/2026 | NA      | admin       | ✓      |
| Edit | Delete | 238     | 7/15/2026 | 2026 | 7/1/2026   | 7/15/2026 | NA      | admin       | ✓      |
| Edit | Delete | 235     | 7/4/2026  | 2026 | 6/16/2026  | 6/30/2026 | NA      | admin       | ✓      |
| Edit | Delete | 231     | 6/30/2026 | 2026 | 6/16/2026  | 6/30/2026 | NA      | admin       | ✓      |
| Edit | Delete | 230     | 6/20/2026 | 2026 | 6/16/2026  | 6/15/2026 | NA      | admin       | ✓      |
| Edit | Delete | 221     | 6/5/2026  | 2026 | 5/16/2026  | 5/31/2026 | NA      | admin       | ✓      |
| Edit | Delete | 216     | 5/20/2026 | 2026 | 5/1/2026   | 5/15/2026 | NA      | admin       | ✓      |
| Edit | Delete | 211     | 5/5/2026  | 2026 | 4/16/2026  | 4/30/2026 | NA      | admin       | ✓      |
| Edit | Delete | 207     | 4/25/2026 | 2026 | 4/16/2026  | 4/30/2026 | NA      | admin       | ✓      |
| Edit | Delete | 205     | 4/20/2026 | 2026 | 4/1/2026   | 4/15/2026 | NA      | admin       | ✓      |
| Edit | Delete | 200     | 4/6/2026  | 2026 | 3/16/2026  | 3/31/2026 | NA      | admin       | ✓      |
| Edit | Delete | 191     | 3/20/2026 | 2026 | 3/1/2026   | 3/15/2026 | NA      | admin       | ✓      |
| Edit | Delete | 188     | 3/5/2026  | 2026 | 2/16/2026  | 2/28/2026 | NA      | admin       | ✓      |

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.

Once a DTR is locked, its lines and raw logs cannot be changed, computed, imported into or deleted; the screen says "DTR is lock!". Unlock it first.

The Over Time, Leave Application and Change Shift documents you link must belong to the same payroll group as the DTR ("The selected overtime application belongs to another payroll group.", and the same for leave and change shift). **Date End** cannot be earlier than **Date Start**.

**Delete** on the list removes the DTR together with its lines and imported logs. A DTR that something else depends on, such as a payroll, cannot be deleted ("This DTR is in use and cannot be deleted.").

If you import logs for an employee and day that already have a line, the new line replaces the earlier one; it is not added a second time.

#### CHECKING AN IMPORT

There is no separate screen that lists past imports. Check each import on the DTR itself, straight after you load the file.

1. When the import ends and some rows were skipped, a warning stays on the screen until you close it. It gives the number of rows skipped and the reason: outside the DTR period, no time, or a Biometric ID that matches no employee (the first IDs are listed). Click **Download skipped rows** to save the rows and their reasons as a file.
2. To see the logs behind a line, click the date on the DTR line. The **Raw Logs** window lists the clock-in and clock-out logs read for that employee and day.
3. Look for employees who have no logs for the period.

Logs whose Biometric ID does not match any employee of the payroll group are not loaded; they are listed in the skipped rows. If an employee has no logs after an import, check that the Biometric ID on the employee record is the same as the ID in the file, then import again.

**CSV** downloads the DTR lines for checking outside the system. It has clear column headings and can be downloaded before the DTR is locked.

## 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

| Edit | Delete | Number     | Date      | Employee             | Other Deduction | DocRef | Amortization | Loan Amount | Paid Amount | Balance Amount | Status |
|------|--------|------------|-----------|----------------------|-----------------|--------|--------------|-------------|-------------|----------------|--------|
| Edit | Delete | 0000000003 | 5/3/2025  | DELA CRUZ, Employ... | SSS Loan        | NA     | 500          | 6,000       | 3,076.92    | 2,923.08       | UNPAID |
| Edit | Delete | 0000000002 | 4/2/2025  | DELA CRUZ, Employ... | Loan            | NA     | 553.74       | 13,289.76   | 11,891.10   | 1,398.66       | UNPAID |
| Edit | Delete | 0000000001 | 3/12/2025 | DELA CRUZ, Employ... | Loan            | NA     | 500          | 5,000       | 84,350.65   | 0              | PAID   |

Loans — the screen as it opens

#### WHAT TO DO

1. Open **PAYROLL → Loans**. The list shows the loans of all employees; there is no payroll group to choose here.
2. Click **Add** for a new loan, or **Edit** to look at an existing one.
3. Fill in the loan:
  - **Employee** — click ▼ and pick the employee from the list.
  - **Other Deduction** — the loan type. The choices are the items in **SETUP → Other Deductions**.
  - **DocRef**, **Amortization** (the amount deducted each time) and **Loan Amount** (the amount lent).
  - **Prepared By**, **Checked By**, **Approved By**, **Status**, **Loan Number** and the **Remarks** tab.

**Date** is filled in with today's date and cannot be changed. There is no start date. **Paid Amount** and **Balance Amount** are filled in by the system.

4. Click **Add** to save the new loan. The screen closes.
5. Open the loan again with **Edit** from the list and click **Lock**. Once locked, **Save** and **Lock** can no longer be clicked; only **Unlock** can. A locked loan refuses every change ("This loan is locked and cannot be edited.").

#### COLUMNS ON THIS SCREEN

|             |                |        |             |          |                 |        |              |             |
|-------------|----------------|--------|-------------|----------|-----------------|--------|--------------|-------------|
| Edit        | Delete         | Number | Date        | Employee | Other Deduction | DocRef | Amortization | Loan Amount |
| Paid Amount | Balance Amount | Status | Loan Number | Remarks  | Prepared By     | Locked |              |             |

#### BUTTONS

|     |     |       |      |        |
|-----|-----|-------|------|--------|
| Add | CSV | Close | Edit | Delete |
|-----|-----|-------|------|--------|

#### WHAT YOU SHOULD SEE

The instalment is not deducted automatically. To deduct it:

1. In **PAYROLL → Other Deductions** (4.3), create the document for the pay period and click **Get Loan**. The **Amortization** of every loan that is locked, UNPAID and still has a balance is added to the lines.
2. Lock that Other Deductions document and link it to the payroll (4.4).
3. When the payroll is computed, the repayment is recorded on the loan, **Paid Amount** and **Balance Amount** are updated, and the loan becomes PAID when the balance reaches zero.

Deductions start from the first **Get Loan** after the loan is created and locked.

Inside a loan, the **Payments** tab (Payroll No., Payroll Other Deduction No., Amount) shows which payroll repaid how much.

#### 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.

A locked loan cannot be deleted (the message "Loan data is lock!" appears). Unlock it first.

A new loan needs an employee, an Other Deduction and a Loan Amount; without them the screen says "Employee is required.", "Other deduction is required." or "Loan amount is required." **Status** follows the balance: UNPAID while a balance remains, PAID when it reaches zero.

**CSV** is available both on the list and inside a loan record. Both files have one row per repayment; a loan that has no repayment yet has one row with the payment columns empty.

## 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 (see 13TH MONTH below).

#### HOW TO GET THERE

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

DASH-BOARD

SETUP

DTR

PAYROLL

REPORTS

PORTAL

SETTINGS

1

Superadmin

Payroll Other Income List

AddClose

Payroll Group

PAYROLL GROUP 01

| Edit | Delete | PI No.     | Date       | Year | Remarks | Prepared By   | Locked |
|------|--------|------------|------------|------|---------|---------------|--------|
| Edit | Delete | 0000000054 | 5/20/2026  | 2026 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000039 | 1/5/2026   | 2025 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000035 | 12/5/2025  | 2025 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000032 | 11/20/2025 | 2025 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000030 | 11/5/2025  | 2025 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000028 | 10/20/2025 | 2025 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000023 | 10/4/2025  | 2025 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000020 | 9/20/2025  | 2025 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000015 | 8/20/2025  | 2025 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000010 | 6/18/2025  | 2025 | NA      | Administrator | ✓      |
| Edit | Delete | 0000000005 | 11/18/2024 | 2024 | NA      | Administrator | ✓      |

<<<

<

1 / 1

>

>>>

Row Show 15

Gamma008.001: Version

https://easyhr-preprod.hr-abi

Other Income — the screen as it opens

## WHAT TO DO

1. Open **PAYROLL** → **Other Income**.
2. Choose the **Payroll Group** on the list first, then click **Add**. The document is created at once for that group, with an automatic number, and the detail screen opens. There is no pay period on the document, only **Year** and **Date**. Which payroll it goes into is decided on the payroll screen (4.4), where you choose this document by its PI No.
3. Add the lines in one of two ways:
  - **ADD** — tick one or more employees, choose the **Other Income**, enter the **Amount** and **Particulars**, then **Save**. Every ticked employee gets the same amount.
  - **Download OtherIncome** — brings in the regular allowances set on each employee (Employee → Other Income). The two ticks **Is Work Required** and **Is Complete Attendance** are on by default; when they are on, you choose a DTR and the amount is computed from the days worked. Clicking it twice adds the lines twice.
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 |
|-----|-------|------|--------|

A locked document cannot be deleted. Unlock it first.

## 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 Prepared By Checked By Approved By Remarks

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

**CSV** can be clicked at any time, also before the document is locked. It exports the lines one row each, with readable column headings.

Note: **Year List** is saved when you click **Lock**, not when you click **Save**. Check the year after locking.

## 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

**WR** is Is Work Required and **CA** is Is Complete Attendance. They cannot be set in **ADD**; set them with **Edit** on the line.

Note: The amount computed from the days worked (with **Is Work Required** or **Is Complete Attendance** on) may be wrong. When you only add a fixed allowance, untick both before **Download OtherIncome**, and check the amounts before locking.

## 13TH MONTH

The 13th month pay is computed in this document: click **ADD** and open the **13 Month** tab.

1. Tick the employees and choose the **Other Income**.
2. Choose **Payroll From** and **Payroll To** (payroll numbers) and the **Company**.
3. Click **Compute**.

The amount is (days worked × daily rate + the allowances included in the company settings - late, undertime and similar deductions) for the payrolls in the range, divided by 12.

Note: The range can cross years. Choose only the payrolls of the year you are paying.

#### 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. The payroll counts only the lines of locked documents.

A document that a locked payroll uses cannot be unlocked ("This document is used by a locked payroll. Unlock the payroll first."), and a document that a payroll uses cannot be deleted ("This document is used by a payroll and cannot be deleted."). While a document is locked the system refuses every change to it and its lines ("Payroll other income is locked.").

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

| Edit                 | Delete                 | PD No.     | Date      | Year | Remarks | Prepared By   | Locked |
|----------------------|------------------------|------------|-----------|------|---------|---------------|--------|
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000142 | 8/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000137 | 8/5/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000132 | 7/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000127 | 7/4/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000122 | 6/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000117 | 6/5/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000108 | 5/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000107 | 5/5/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000102 | 4/25/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000101 | 4/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000096 | 4/4/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000090 | 3/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000082 | 3/5/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000081 | 2/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000076 | 2/5/2026  | 2026 | NA      | Administrator | ✓      |

Other Deductions — the screen as it opens

#### WHAT TO DO

1. Open **PAYROLL → Other Deductions**.

2. Choose the **Payroll Group** on the list first, then click **Add**. The document is created at once (number, today's date, Remarks "NA") and the detail screen opens. There is no pay period field; there are only **Year List** (the locked year of this year) and **Date**.
3. To bring in loan instalments, click **Get Loan**, choose the **Loan Number** (ALL / 1 / 2) and click **Post**. Every loan of the group's employees that is locked, UNPAID and still has a balance is added, with the amortization (or the balance, if it is smaller). The pay period is not checked.
4. To add other deductions, click **Add** on the lines: pick the **Employee** (▼ shows the employees of this payroll group), the **Other Deduction**, the **Loan** (leave it at "LoanNumber" for a deduction that is not a loan), the **Amount** and the **Particulars**, then **Save**.
5. Click **Save**, then **Lock**.

**Get Loan** replaces only the loan lines it loads; the deductions you added by hand are kept.

#### 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>`.

Payroll Other Deduction Detail

0000000142 PAYROLL GROUP 01 Year List 2026 Remarks NA

Date: 8/20/2026 Prepared By: admin Checked By: admin Approved By: admin

Other Deduction Line

| Employee                | Other Deduction | Loan       | Amount | Particulars |
|-------------------------|-----------------|------------|--------|-------------|
| DELA CRUZ, Employee 121 | Loan            | 0000000001 | 500    | 2nd out 6   |
| DELA CRUZ, Employee 123 | HMO Dependents  | 0000000001 | 755.29 | NA          |
| DELA CRUZ, Employee 123 | HMO             | 0000000001 | 275.83 | NA          |

Created By: Administrator Created DateTime: Aug 6 2026 12:03PM Updated By: Administrator Updated DateTime: Aug 6 2026 12:04PM

Gamma.008.001 Version <https://easyhr-preprod.hi-api.io>

Other Deductions — the record

**Tabs:** Other Deduction Line

**Fields:** Year List Date Prepared By Checked By Approved By Remarks

The document number and the payroll group are shown in the blue box at the top and cannot be changed.

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

**CSV** can be clicked at any time, also before the document is locked.

#### 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 when you link the locked document to a payroll (4.4). When the payroll is computed, each loan line is recorded as a repayment of that loan and appears on the loan's **Payments** tab.

#### WORTH KNOWING

Once the document is locked, **Save**, **Get Loan**, **Add** and the **Edit/Delete** on the lines disappear. A locked document cannot be deleted, and a document used in a payroll cannot be deleted. The system refuses every change to a locked document ("Payroll other deduction is locked.") and it refuses an unlock while a locked payroll uses it ("This document is used by a locked payroll. Unlock the payroll first.").

The **Loan** chosen on a line must be a loan of the same employee ("The selected loan does not belong to the selected employee."). Adding or changing a line does not change the loan's paid amount or balance; the loan is updated only when the payroll is computed.

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`

| Edit                 | Delete                 | Pay No.    | Date      | Year | Remarks | Prepared By   | Locked |
|----------------------|------------------------|------------|-----------|------|---------|---------------|--------|
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000248 | 8/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000240 | 8/5/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000236 | 7/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000232 | 7/15/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000228 | 7/4/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000224 | 6/30/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000223 | 6/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000214 | 6/5/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000209 | 5/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000206 | 5/5/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000199 | 4/25/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000197 | 4/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000192 | 4/6/2026  | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000183 | 3/20/2026 | 2026 | NA      | Administrator | ✓      |
| <a href="#">Edit</a> | <a href="#">Delete</a> | 0000000178 | 3/5/2026  | 2026 | NA      | Administrator | ✓      |

Payroll — the screen as it opens

## WHAT TO DO

1. Open **PAYROLL** → **Payroll**.
2. Choose the **Payroll Group** on the list first, then click **Add**. The document is created at once for that group; **Date** is today and **Year** is filled in automatically. If the group has no locked Other Income or Other Deductions document, **Add** stops with an error (for example "Payroll income not found!").
3. On the detail screen, correct the **Date** and choose the **Month Name**. **Month Name** is empty after **Add** and must be chosen; it is used for the monthly SSS and other contributions.
4. Choose the **DTR**, the **Payroll Other Income** and the **Payroll Other Deduction** documents for the same period from the drop-down lists, then click **Save**. All of them must already be locked.
5. Click **Download DTR**, then **Next Step** → **Post** → **Done**. This brings in every employee in the DTR together with their hours. Use **Download Employee** only to add, one by one, an employee who is not in the DTR.
6. Click **Compute**, then **Next Step**, tick **Compute SSS**, **Compute PHIC** and **Compute HDMF** as needed, click **Compute** and then **Done**. easyHR applies the rates, the contribution tables, the loans and the other income and deductions, and fills in the payroll lines.
7. Check the computed lines — gross, contributions, loans, other income, other deductions, net.
8. Click **Save**, then **Lock**.
9. Click **Print Worksheet** to see the worksheet, and print the payslips from the Reports menu. **Print Worksheet** and **CSV** can be clicked only after the payroll is locked. The worksheet opens as a PDF inside the screen; it is not downloaded.

## 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> .

DASHBOARD

SETUP

DTR

PAYROLL

REPORTS

PORTAL

SETTINGS

1

Superadmin

Payroll Detail

SaveLockUnlockPrint WorksheetCSVClose

0000000248

PAYROLL GROUP 01

Year List2026

Processed Byadmin

Checked Byadmin

Approved Byadmin

Date8/20/2026

Quarter No3

Month NameAugust

Week No0

RemarksNA

DTR(2026-08-01 - 2026-08-15) - 252

Payroll Other Income6000000005

Payroll Other Deduction0000000142

Import PayrollDownload EmployeeDownload DTRAddComputeDelete All

| Employee               | Payroll Rate | Total Daily Pay | Total Restday Pay | Total Premium Pay | Total Holiday Pay | Total Overtime Pay | Total Night Differ... | Total Additional A... | Total Late Deduct... | Total |
|------------------------|--------------|-----------------|-------------------|-------------------|-------------------|--------------------|-----------------------|-----------------------|----------------------|-------|
| DELA CRUZ, Employee 01 | 7,050        | 6,507.72        | 0                 | 699.13            | 0                 | 0                  | 0                     | 0                     | 4.52                 |       |
| DELA CRUZ, Employee 02 | 7,300        | 6,738.48        | 0                 | 730.00            | 0                 | 43.87              | 0                     | 0                     | 0                    |       |
| DELA CRUZ, Employee 03 | 7,500        | 6,923.04        | 0                 | 750.00            | 0                 | 0                  | 0                     | 0                     | 2.40                 |       |
| DELA CRUZ, Employee 04 | 7,500        | 7,499.96        | 0                 | 0                 | 0                 | 0                  | 0                     | 0                     | 0                    |       |
| DELA CRUZ, Employee 05 | 7,500        | 6,923.04        | 0                 | 742.18            | 0                 | 0                  | 0                     | 0                     | 6.01                 |       |
| DELA CRUZ, Employee 06 | 7,050        | 6,507.72        | 0                 | 705.00            | 0                 | 0                  | 0                     | 0                     | 56.49                |       |
| DELA CRUZ, Employee 07 | 7,050        | 6,507.72        | 0                 | 700.60            | 0                 | 0                  | 0                     | 0                     | 10.17                |       |
| DELA CRUZ, Employee 08 | 8,500        | 7,846.20        | 0                 | 850.01            | 0                 | 0                  | 0                     | 0                     | 0                    |       |
| DELA CRUZ, Employee 09 | 9,000        | 8,307.72        | 0                 | 900.00            | 0                 | 113.58             | 0                     | 0                     | 0                    |       |
| DELA CRUZ, Employee 10 | 7,500        | 6,923.04        | 0                 | 750.00            | 0                 | 0                  | 0                     | 0                     | 34.86                |       |
| DELA CRUZ, Employee 11 | 7,050        | 6,507.72        | 0                 | 705.00            | 0                 | 0                  | 0                     | 0                     | 25.99                |       |
| DELA CRUZ, Employee 12 | 7,300        | 6,738.48        | 0                 | 730.00            | 0                 | 57.03              | 0                     | 0                     | 2.34                 |       |
| DELA CRUZ, Employee 13 | 7,050        | 6,507.72        | 0                 | 702.07            | 0                 | 0                  | 0                     | 0                     | 6.78                 |       |
| DELA CRUZ, Employee 14 | 7,050        | 6,507.72        | 0                 | 611.00            | 0                 | 0                  | 0                     | 0                     | 6.78                 |       |
| DELA CRUZ, Employee 15 | 7,050        | 6,507.72        | 0                 | 705.00            | 0                 | 0                  | 0                     | 0                     | 0                    |       |

<<<>>>

1 / 2

Number of Employee: 19

Gamma.008.001 Version

https://easyhr-preprod.hi-api.io

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 Gross Income SSS PHIC HDMF Income Tax Other Deduction Net Income

These are the main columns; scroll sideways to see them all. Each line has its own **Edit** and **Delete**.

**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.

easyHR User Manual · Gamma.008.003

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If employees are missing from the run, check that the linked DTR is locked and that it has a line for those employees. **Download DTR** brings in only the employees in the DTR.

**Download DTR** and **Download Employee** skip an employee who already has a line in the payroll, so pressing them again does not add the line twice.

Once a payroll is locked the system refuses every change to it and its lines ("Payroll is locked."). **Lock** is refused if no month is chosen ("Month is required (1 to 12)..."), if the payroll has not been computed ("Payroll has not been computed... Please compute before locking.") or if the linked DTR, Other Income or Other Deduction document is not locked and from the same 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

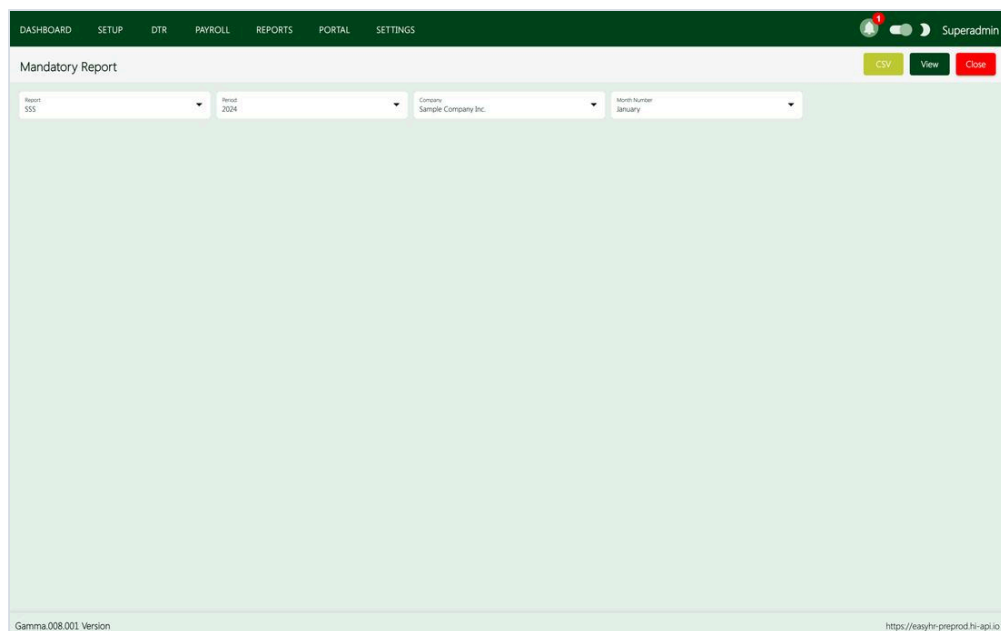
Twenty-five reports covering payroll, statutory contributions, loans and attendance. All of them read data that already exists; none of them change anything. The one exception is the **Integrate** button on the Journal Voucher (5.9), which sends the journal entry to easyFS.

### 5.1 Mandatory Reports

A list of the statutory contributions — SSS, PhilHealth and HDMF (Pag-IBIG) — for a chosen month, per employee and per payroll, with subtotals and a total. Use it to check the amounts to be remitted. It is an in-house list, not the agencies' own forms (such as SSS R-3, PhilHealth RF-1 or Pag-IBIG MCRF).

#### 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**. The screen opens with the oldest year and January, so always choose the year and month again.
3. Click **View**. The report is built and opened in the viewer.
4. Click **CSV** instead to download the list as a spreadsheet file (mandatory-list.csv).
5. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Report    Period    Company    Month Number

- **Report** — SSS, PHIC (PhilHealth) or HDMF (Pag-IBIG).

- **Period** — the year. Only locked years are listed.
- **Company** — only locked companies are listed. A shared user does not see this field.
- **Month Number** — the month chosen in **Month Name** on each payroll, not the pay date or cut-off date. Only locked payrolls are included.

#### BUTTONS

CSV View Close

#### WHAT YOU SHOULD SEE

One line per employee per payroll — Income, employee share, employer share, EC (SSS only) and total — a subtotal per employee, and a Total at the end. Names are printed as Last, First M. (without an empty "NA" extension), and the column headings are repeated on every page.

The CSV has extra columns that the PDF does not show (Id No., TIN and date of birth) and has no subtotal lines.

A payroll cannot be locked until its **Month Name** is set; the screen shows "Month is required (1 to 12)". Payrolls that were locked earlier without a Month Name still do not appear in any month.

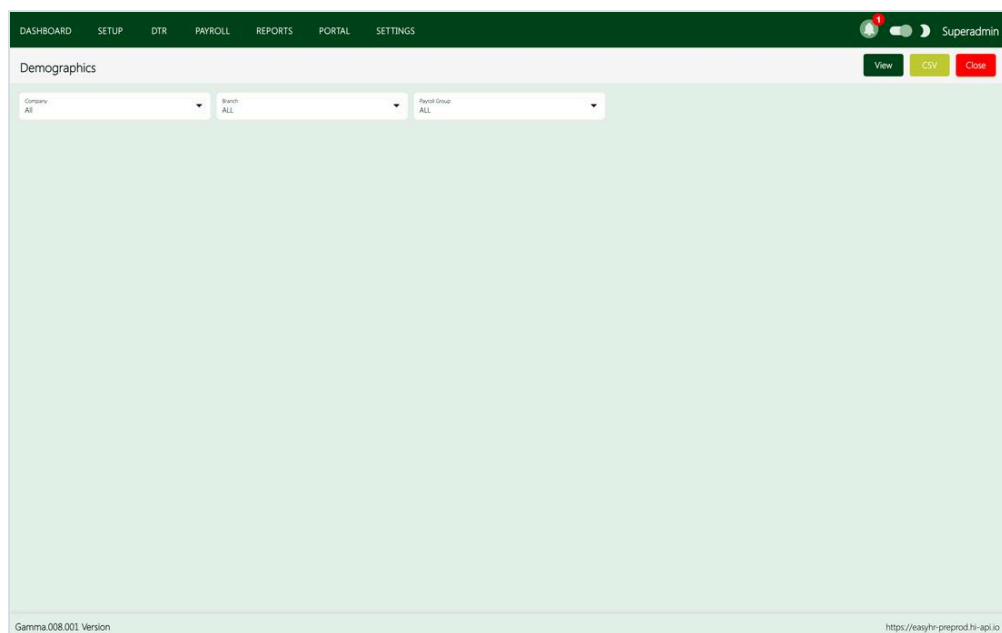
Note: When you open the CSV in Excel, leading zeros in the ID numbers are dropped. Check the numbers against the PDF.

## 5.2 Demographics

A list of employees, one line per employee, with their personal, employment, pay and government ID details, for the whole company or a chosen branch or payroll group. It has no totals or breakdowns.

#### 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 list as a spreadsheet file.
5. Click **Close** to leave the screen.

## FIELDS ON THIS SCREEN

Company Branch Payroll Group

- **Company** — only locked companies are listed, plus **All**.
- A shared user does not see Company and cannot change Branch or Payroll Group.

## BUTTONS

View CSV Close

## WHAT YOU SHOULD SEE

One line per employee with 36 columns: name, ID, company, position, department, branch, address, date of birth, age, employment status, hired, regularization and resignation dates, blood type, sex, civil status, nationality, monthly, daily, hourly and overtime rates, allowances, ATM, SSS, PHIC, HDMF and TIN numbers, and tax code. The PDF is printed on tabloid paper, landscape.

The PDF and the CSV list the same employees: locked employees of locked companies. An employee who is not locked appears in neither.

This report contains pay rates and government ID and bank account numbers. Share and store it with care.

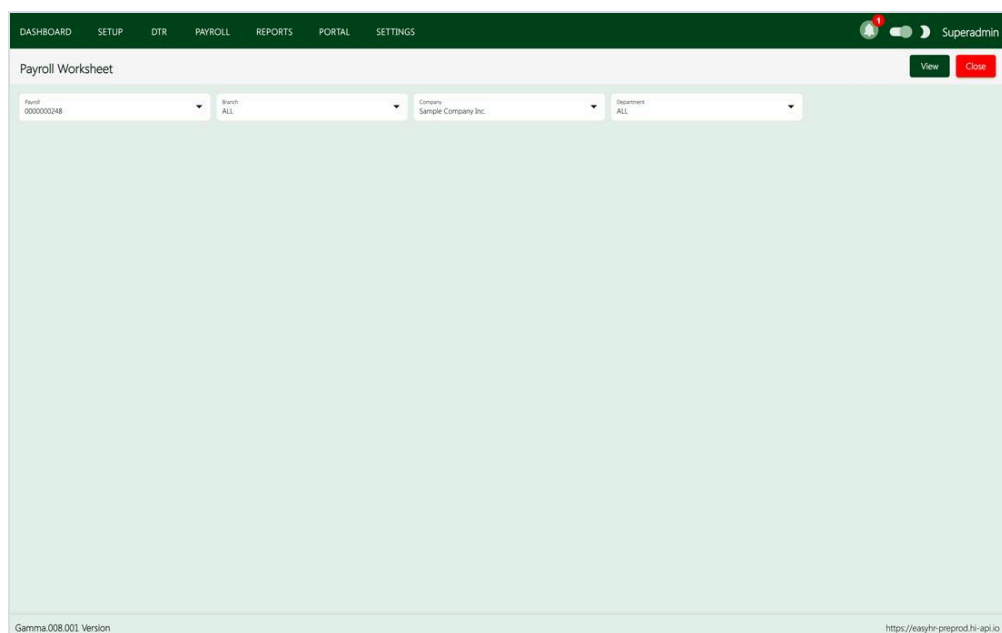
## 5.3 Payroll Worksheet

The full working of one pay run: every employee, every component of gross pay, every deduction and the net. Only locked payrolls can be chosen, so lock the payroll first and check this report before the payroll is paid out.

## HOW TO GET THERE

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

The menu appears for users with the **Demographics Reports** right. There is no separate right for this report.



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 opens as a PDF in the viewer at the bottom of the screen. Use the viewer's buttons to download or print it.
4. Click **Close** to leave the screen.

## FIELDS ON THIS SCREEN

Payroll Branch Company Department

- **Payroll** — only locked payrolls are listed, by number (for example 0000000252), newest first.
- **Branch** and **Department** filter by the employee's current branch and department, not the ones at the time of the payroll.
- A shared user does not see Company and Department and cannot change Branch.

## BUTTONS

View Close

## WHAT YOU SHOULD SEE

Above the table, the payroll details: Payroll No., Payroll Group, Year, Date, Quarter/Month/Week No., DTR No., Other Income and Other Deduction Nos., Prepared/Checked/Approved By and Remarks.

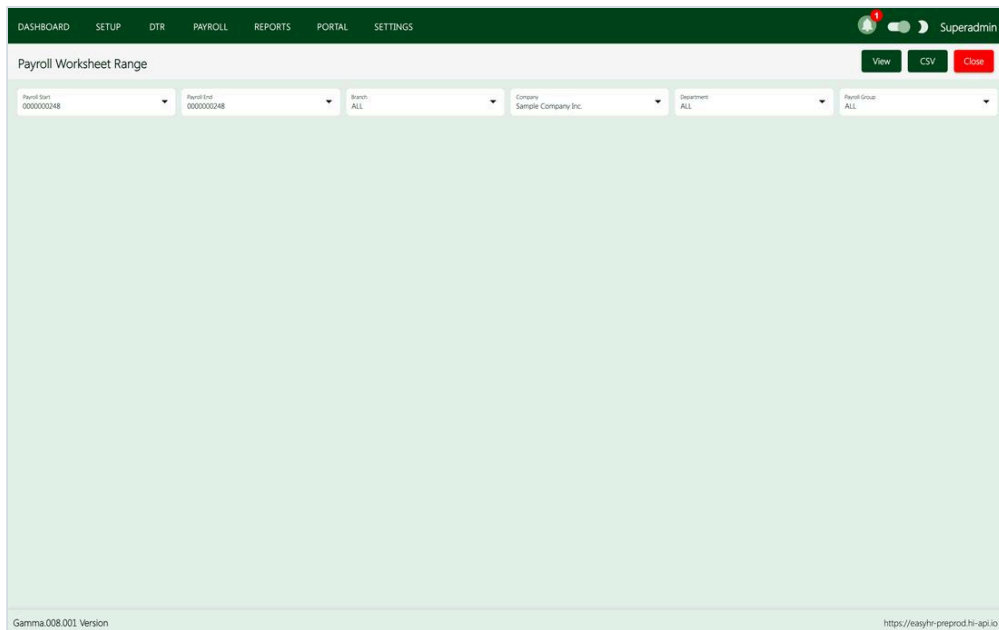
Then one line per employee with the hours (Regular, Restday, Overtime, Night, Tardy) and the amounts: Reg. Pay, COLA, Premium Pay, Holiday Pay, Overtime, NSD, Tardiness, Total Gross Salary, Other Income (taxable and non-taxable), Total Gross Income, SSS, HDMF, PHIC, WTAX, Other Deductions and Net Take Home Pay. Absence deductions and Other Deductions are the amounts saved in the payroll, so each line agrees with its Net Take Home Pay. The Grand Total line adds up the amount columns only, not the hours. There is no CSV.

## 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 figures as a spreadsheet file (PayrollWorksheet.csv).
5. Click **Close** to leave the screen.

### FIELDS ON THIS SCREEN

Payroll Start   Payroll End   Branch   Company   Department   Payroll Group

- **Payroll Start** and **Payroll End** — only locked payrolls are listed, by payroll number only, newest first. Payrolls of all payroll groups are mixed, so check the number and period in the Payroll list before you choose. Both start at the newest payroll.
- The range includes every payroll between Start and End, including those of other payroll groups. To see one group only, also choose **Payroll Group**. If you set Start later than End, End changes to Start.
- **Branch**, **Department** and **Payroll Group** filter by the employee's current branch, department and payroll group, not the ones at the time of the payroll.
- **Company** lists your own company. A shared user does not see Company and Department and cannot change Branch or Payroll Group.

## BUTTONS

[View](#)[CSV](#)[Close](#)

## WHAT YOU SHOULD SEE

The PDF shows one line per employee with the totals for the range, and a Total line at the end. It has 24 columns, from Reg. Pay to NET TAKE HOME PAY. For employees paid a fixed rate, Reg. Pay is the sum of their payroll rate.

The CSV starts with four lines (Payroll Range, Company, Branch, Department; the last two show your selection) and lists only the employees of the chosen Branch and Department. It has many more columns than the PDF (about 70), such as days, the employer share of contributions, daily/monthly rate, employee number, branch, department and position.

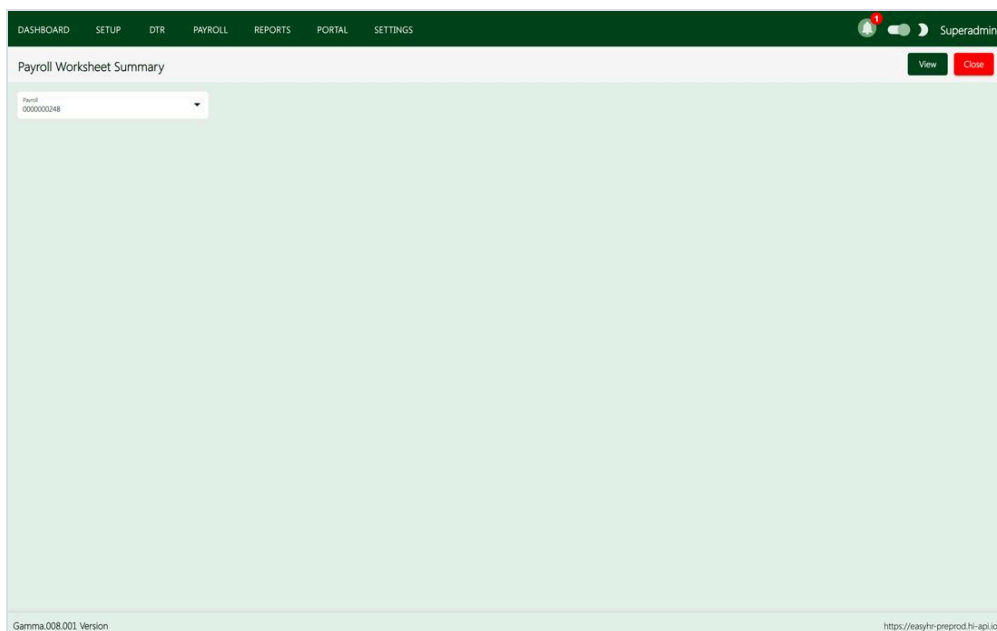
The Other Deductions figures are the amounts saved in each payroll of the range, so they agree with the Payroll Worksheet (5.3) of each payroll. The column headings repeat on every page of the PDF.

## 5.5 Payroll Summary Worksheet Report

The other income and other deductions of one payroll, totalled by item, department and branch. It has no line per employee and does not show basic pay or contributions such as SSS. The screen title is **Payroll Worksheet Summary**.

## 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 opens as a PDF in the viewer at the bottom of the screen. Use the viewer's buttons to download or print it.

4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Payroll

- **Payroll** — only locked payrolls are listed, by number (for example 0000000252), newest first. A payroll that is not locked does not appear.

#### BUTTONS

View

Close

#### WHAT YOU SHOULD SEE

The totals of each other income and other deduction item, by department and branch, for the chosen payroll, in two amount columns (Other Income and Other Deduction), with the company name in the heading. There is no CSV.

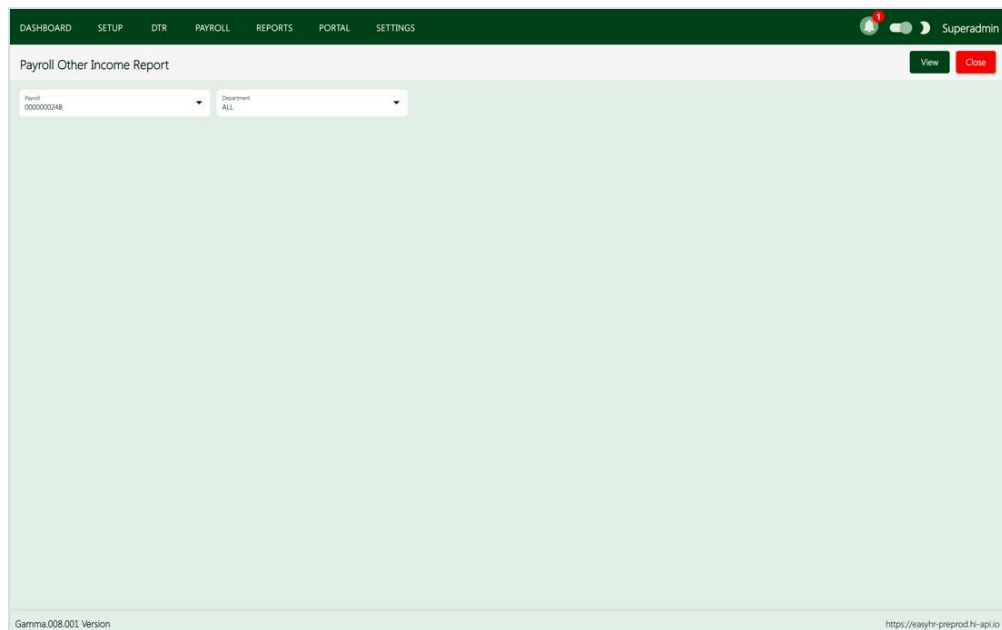
The **Net Take-Home Pay** row at the foot is the total other income minus the total other deductions of the payroll. It is not the employees' net pay; for that, use the Payroll Worksheet (5.3).

## 5.6 Payroll Other Income

The other income lines of a payroll, listed by employee. The screen title is **Payroll Other Income Report**.

#### 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 opens as a PDF in the viewer at the bottom of the screen. Use the viewer's buttons to download or print it.
4. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Payroll Department

- **Payroll** — only locked payrolls are listed, by number only (no year or group), newest first. The newest payroll is selected when the screen opens.
- **Department** — starts at **ALL**; the list comes from the Department table in Setup. It filters by the department the employee had in the payroll.

#### BUTTONS

View Close

#### WHAT YOU SHOULD SEE

For each employee, a heading line with the name, then one line per line of the Other Income document (two lines of the same type stay as two lines), then a Total line for the employee. A GRAND TOTAL line comes at the end; the column headings repeat on every page, and with no data the report says "No records found." There is no CSV.

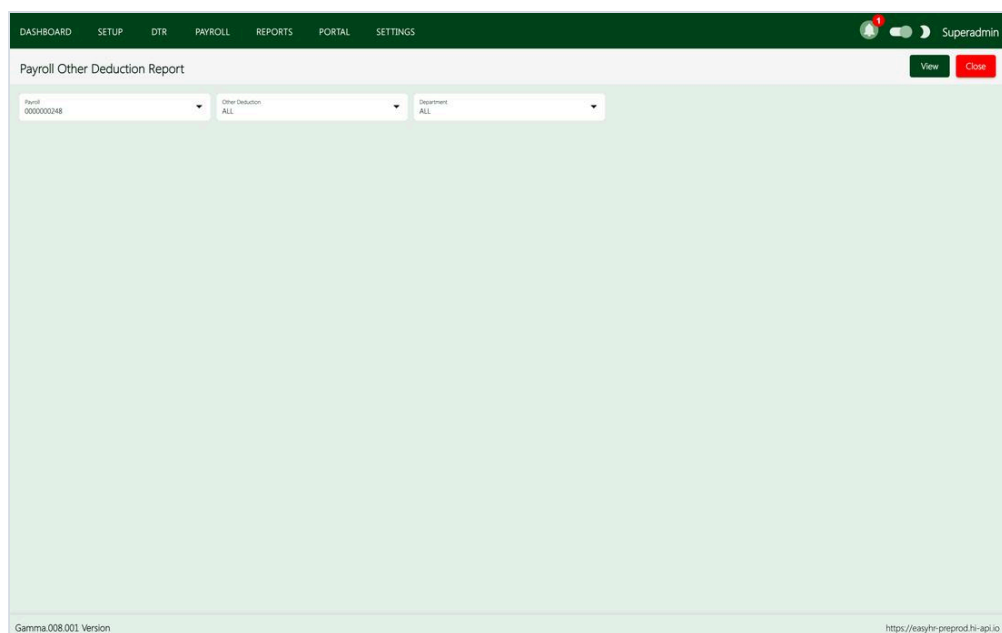
The totals are what was paid in the payroll (taxable and non-taxable other income). The lines are the types in the Other Income document linked to the payroll; if the document was changed after the payroll, an extra line "OTHER INCOME PAID (adjustment)" shows the difference, so the lines always add up to the amount paid.

## 5.7 Payroll Other Deduction

The other deductions of a payroll, listed by employee. The screen title is **Payroll Other Deduction Report**.

#### 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 opens as a PDF in the viewer at the bottom of the screen. Use the viewer's buttons to download or print it.
4. Click **Close** to return to the dashboard.

## FIELDS ON THIS SCREEN

Payroll

Other Deduction

Department

- **Payroll** — only locked payrolls are listed, by number (for example 0000000192), newest first, with all payroll groups mixed. A payroll that is not locked does not appear.
- **Other Deduction** — **ALL**, or one locked deduction type.
- **Department** — **ALL**, or one department. It filters by the department the employee had in the payroll.

## BUTTONS

View

Close

## WHAT YOU SHOULD SEE

The columns are Department, Branch, Employee Name, Position, Other Deduction (the deduction type) and Amount. An employee with more than one deduction has one line per type and a "Total" line for that employee; the Grand Total is at the end. With no data the report says "No records found." There is no CSV.

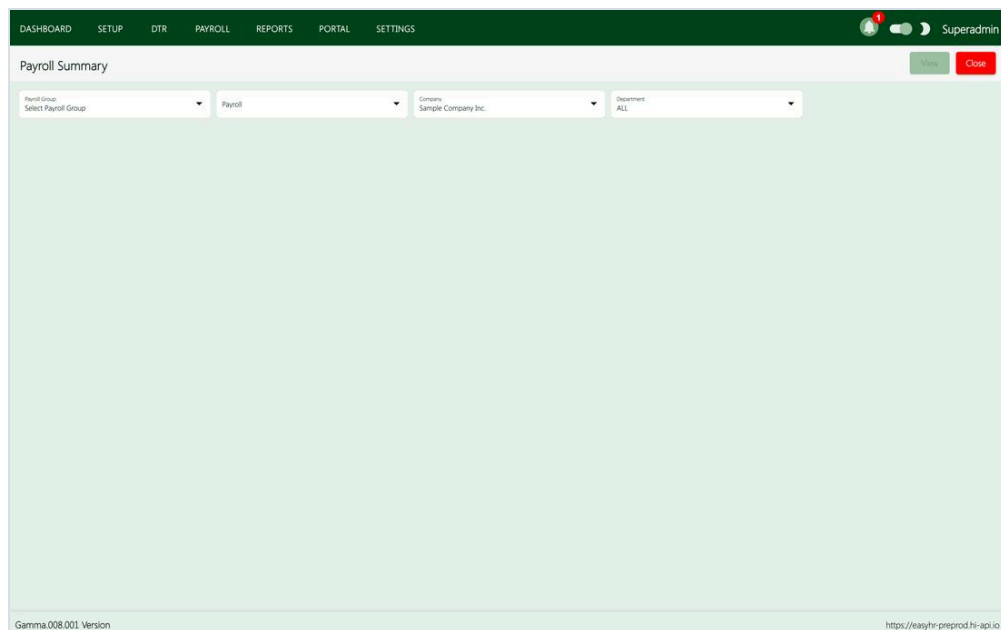
The totals are what was deducted in the payroll. The lines are the types in the Other Deductions document linked to the payroll; if the document was changed after the payroll, an extra line "OTHER DEDUCTION (adjustment)" shows the difference (when ALL is chosen).

## 5.8 Payroll Summary

The payroll for a period reduced to its totals by department, branch and position. 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. Choose the **Payroll Group** first. The **Payroll** list then shows the locked payrolls of that group, by number. **View** stays disabled until a payroll group is chosen. If the group has no locked payroll, "No payroll found!" appears.
3. Choose the **Payroll**, then **Company** and **Department**.
4. Click **View**. The report opens as a PDF in the viewer at the bottom of the screen. Use the viewer's buttons to download or print it.
5. Click **Close** to leave the screen.

### FIELDS ON THIS SCREEN

Payroll Group   Payroll   Company   Department

- **Company** — only locked companies can be chosen, or **All**. Only employees of the chosen company are counted.
- **Department** — starts at **ALL**.
- A shared user does not see Company and Department.

### BUTTONS

View   Close

## WHAT YOU SHOULD SEE

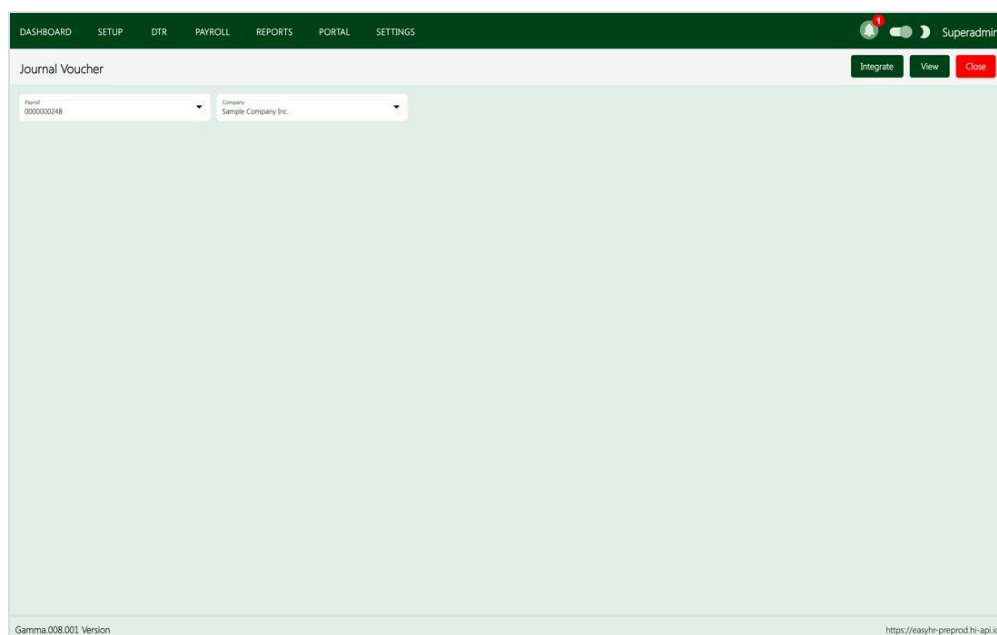
One line per department, branch and position, with No. of Pax (number of employees), Total Working Days, Gross Pay, Gross Other Deduction, Contributions (SSS + PHIC + HDMF), Withholding Tax and Net Take Home Pay, and a Grand Total at the end. The page number, the print date and Prepared by / Approved by lines are printed at the bottom. If nothing matches, the report says so. There is no CSV.

## 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. Most account names are fixed (for example Salaries and Wages, SSS Expense, Cash, SSS Payable); only other income and other deductions use the accounts set on their own records. The SSS, PHIC, HDMF and tax accounts on the company record are not used.

## 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 opens in the viewer. Use the buttons at the top right of the viewer to print or download it.
4. To send the entry to easyFS, click **Integrate**, then **Yes** on "Are you sure you want to integrate Journal Voucher to EasyFS?".
5. Click **Close** to leave the screen.

## FIELDS ON THIS SCREEN

Payroll

Company

- **Payroll** — only locked payrolls are listed, by payroll number, newest first, with all payroll groups mixed.
- **Company** — only employees of the chosen company are counted. A shared user does not see this field.

#### BUTTONS

Integrate View Close

- **Integrate** — sends the journal entry to easyFS. You need the edit right on System Tables, and the link to easyFS must be set up for your company. Ask Humedit PH if it is not.

#### WHAT YOU SHOULD SEE

Under a heading with the company, the payroll number and the pay date, a table with the columns Account, Debit, Credit and Difference. Debits are salaries, other income and the employer share of contributions. Credits are Cash (the net pay), contributions (employee and employer share), withholding tax and other deductions. The last cell of the total line is debit minus credit; if it is not 0.00, the entry does not balance. The totals come from the payroll itself; if the Other Income or Other Deduction document does not add up to the payroll, a separate line shows the difference. There is no CSV.

**Integrate** does not send an entry that is not balanced, or one that needs an account missing from the Chart of Accounts in easyFS; it shows the reason (for example "These accounts are not set up in the Chart of Accounts: ...") and nothing is sent. It also shows an error when easyFS is not linked or does not accept the entry. A success message means the entry was posted.

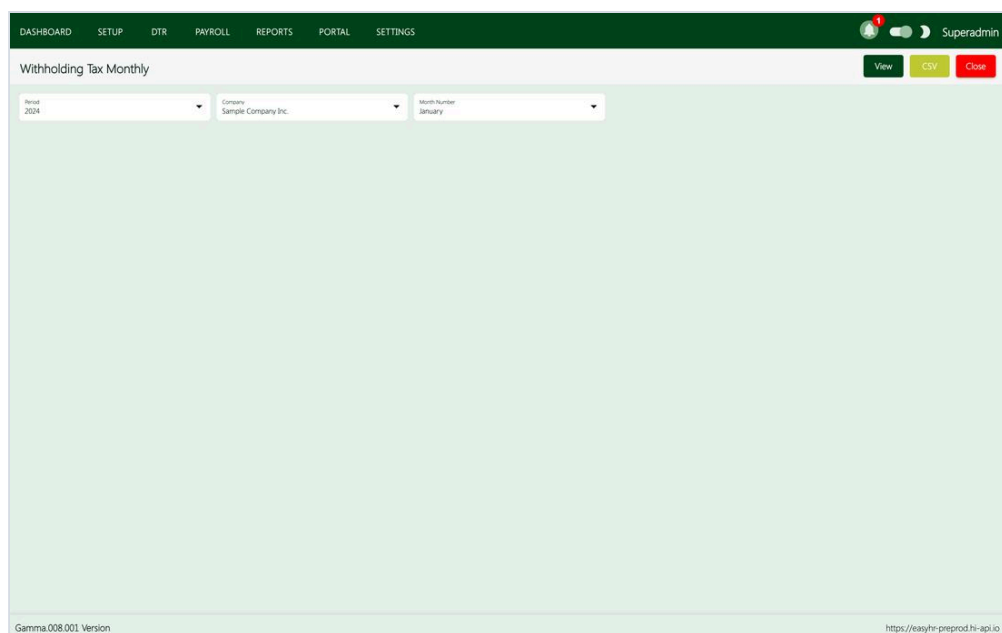
## 5.10 Withholding Tax Monthly

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

#### HOW TO GET THERE

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

The menu appears for users with the **Demographics Reports** right, as for the other reports.



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**. The screen opens with the oldest year, so always choose the year again.
3. Click **View**. The report is built and opened in the viewer.
4. Click **CSV** instead to download the figures as a spreadsheet file.
5. Click **Close** to leave the screen.

## FIELDS ON THIS SCREEN

Period Company Month Number

- **Period** — the year.
- **Company** — a shared user does not see this field.
- **Month Number** — the Month Number set on each payroll, not the month of the pay date. For example, a payroll paid on 5 August with Month Number 7 appears under July. Only locked payrolls are included.

## BUTTONS

View CSV Close

## WHAT YOU SHOULD SEE

The columns are Name, TIN, Payroll No., Tax Code, Net Salary, Other Income and Tax. There is one line per employee per payroll, a Sub Total per employee, and a Total at the end (the amount to be remitted). Net Salary is the salary less SSS, PHIC and HDMF; it is not the amount actually paid out.

A payroll cannot be locked without a month. Payrolls that were locked earlier without a Month Number still do not appear in any month.

Note: The Other Income column currently always shows 0.

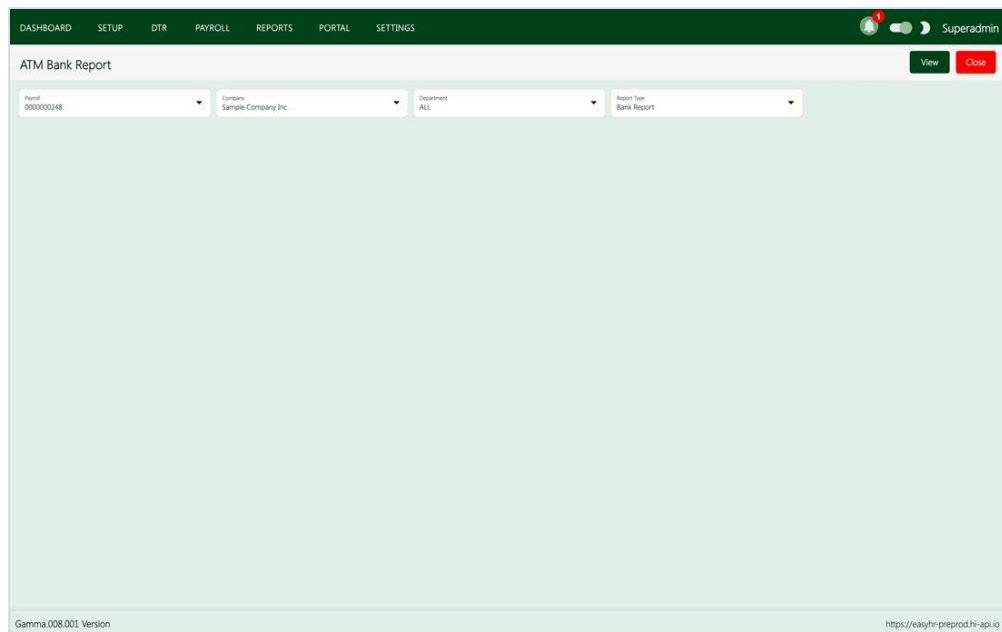
The CSV lists every payroll line of an employee, in name order, with the same Net Salary as the PDF, so its Sub Total equals the rows above it. The column headings repeat on every page of the PDF, and with no data the report says "Data not found."

## 5.11 ATM Bank Report

The payroll figures for the bank. Depending on **Report Type**, you get a summary by bank, or a list of accounts and net amounts together with the file to send to the bank.

### 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. For BPI or METROBANK, click **CSV**; for BDO, click **Text**. This creates the file to send to the bank.
5. Click **Close** to leave the screen.

### FIELDS ON THIS SCREEN

Payroll   Company   Department   Report Type

- **Payroll** — only locked payrolls are listed, by payroll number only, newest first.
- **Report Type** — **Bank Report**: a PDF with the number of employees and the total per bank name. **BPI** and **METROBANK**: a PDF table and a CSV file for the bank. **BDO**: a PDF table and a tab-separated text file for the bank.
- A shared user does not see Company, Department and Report Type.

## BUTTONS

[View](#) [CSV](#) [Text](#) [Close](#)

CSV appears for BPI and METROBANK, and Text for BDO.

## WHAT YOU SHOULD SEE

For Bank Report: no account numbers, only the number of employees and the total per bank name.  
For BPI, BDO and METROBANK: the accounts and amounts to be sent to the bank, in the table and in the file.

Department is applied to the PDF of every report type and to the BDO text file. The BPI and METROBANK CSV files include all departments.

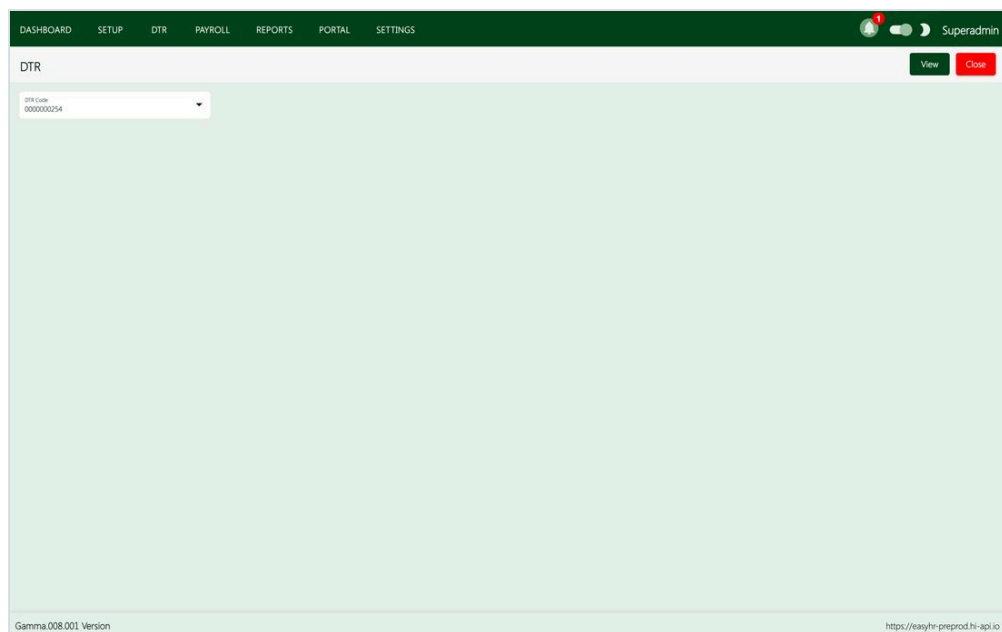
## 5.12 DTR Report

The attendance behind a pay period, per employee and per day, for every employee in one DTR. The screen title is **DTR**.

### HOW TO GET THERE

**REPORTS → DTR Report** </software/dtr-report>

The menu appears for users with the **Demographics Reports** right (not "DTR Reports").



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 opens as a PDF in the viewer. Use the viewer's buttons to download or print it.
4. Click **Close** to leave the screen.

## FIELDS ON THIS SCREEN

DTR Code

- **DTR Code** — only locked DTRs are listed, by number only (no payroll group or period), newest first. The newest DTR is selected when the screen opens. You cannot choose employees; the period is the DTR's period.

## BUTTONS

View

Close

## WHAT YOU SHOULD SEE

One table per employee in the DTR, with a total line. The columns are Date, Type, R (rest day), OB, OL, A (absent), IN1/OUT1/IN2/OUT2, REG (hours), LATE AMT, UT AMT, NET (daily amount), NIGHT PAY, OT (overtime hours) and OT PAY (overtime pay). The columns are headed LATE AMT, UT AMT, NIGHT PAY and OT PAY because they are amounts, not hours; REG and OT are hours with two decimals. Employees are in name order. There is no CSV.

Note: Absences show only as a tick in A, with no amount. Check absence deductions in the Payroll Worksheet (5.3).

A DTR that has no lines cannot be printed: the screen shows "This DTR has no lines to print." Choose a DTR that has employees in it.

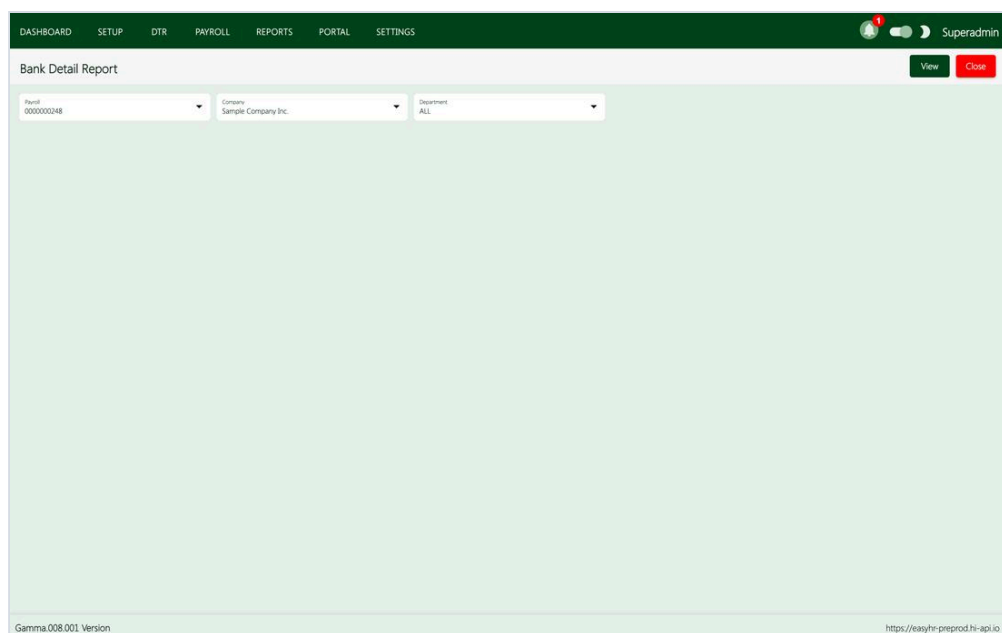
## 5.13 Bank Detail Report

The net pay of one locked payroll, grouped by bank and listed with each employee's bank branch and account number, so that the amounts can be checked before the payroll is sent to the bank. The report opens with the heading **Bank Detail Report**.

## HOW TO GET THERE

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

The menu entry appears for users who have the **Demographics Reports** user right (Settings → Users).



Bank Detail Report — the screen as it opens

## WHAT TO DO

1. Open **REPORTS** → **Bank Detail Report**.
2. Choose the **Payroll**. Only locked payrolls are listed, by payroll number only (newest first, no year, group or date). The newest payroll is selected when the screen opens.
3. Choose the **Company** (the first company is selected when the screen opens) and, if needed, a **Department** (**ALL** by default).
4. Click **View**. The report opens as a PDF in the viewer below. Use the viewer's buttons to download or print it.
5. Click **Close** to leave the screen.

## FIELDS ON THIS SCREEN

Payroll

Company

Department

## BUTTONS

View

Close

## WHAT YOU SHOULD SEE

A PDF headed **Bank Detail Report**, with the company name, the payroll number, date and group, and the print date. Page numbers are printed on every page. Employees are grouped by bank; each bank has a heading line with the number of employees (Pax) and the total amount, and a **Grand Total** closes the report. Each employee has one line with the Employee No., Employee Name, Department, Bank, Branch, Account Number and Net Pay. If the payroll has no lines for your selection, the report shows "No records found."

## WORTH KNOWING

An employee whose Payroll tab has no account number is printed with "(no account)", and an employee with no bank name is grouped under "NA". Correct these on the employee's Payroll tab before you send the payroll to the bank.

The Department selection uses the department recorded on the payroll line, that is, the department at the time of the payroll.

When you sign in as a shared user, the Company and Department fields are not shown.

There is no CSV or Excel output; the report is PDF only.

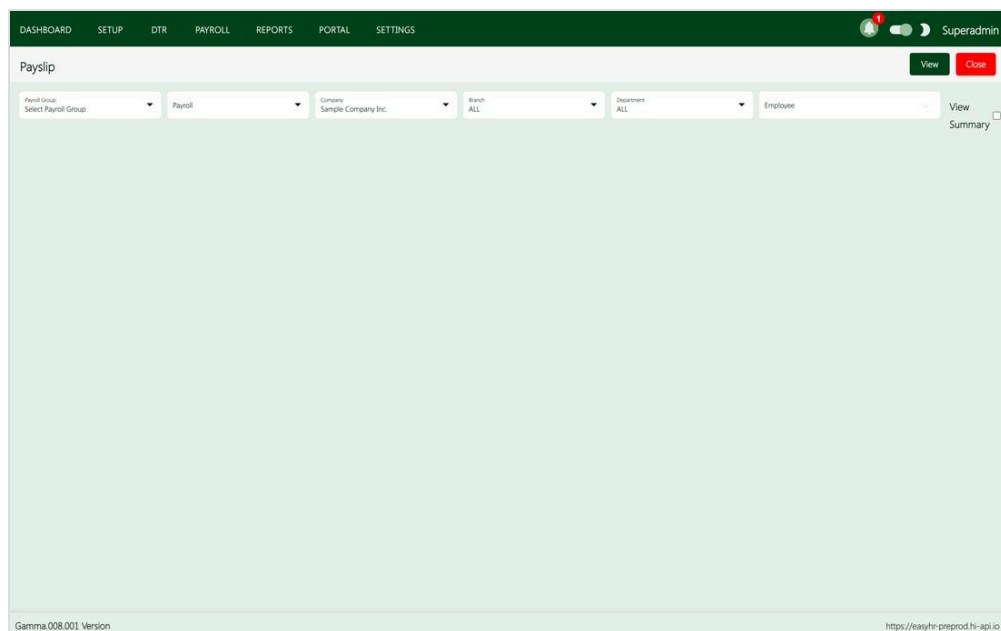
## 5.14 Payslip Report

The payslips for a locked payroll, ready to print. 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. The screen is headed **Payslip**.

### HOW TO GET THERE

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

The menu entry appears for users who have the **Demographics Reports** user right (Settings → Users).



Payslip Report — the screen as it opens

### WHAT TO DO

1. Open **REPORTS → Payslip Report**.
2. Choose the **Payroll Group** first. The **Payroll** list is filled only after this.
3. Choose the **Payroll**. Only locked payrolls are listed, by payroll number only (newest first).
4. If needed, narrow the list with **Company** (the first company by default), **Branch** and **Department** (both **ALL** by default).
5. To print one employee, open the **Employee** list and pick the employee. Only employees currently in the chosen payroll group are listed. Pick **ALL** to go back to every employee.
6. Tick **View Summary** if you want a summary page at the end (see below).
7. Click **View**. The payslips open as a PDF in the viewer below. Use the viewer's buttons to download or print them.

8. 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. **TOTAL GROSS INCOME** and **NET TAKE HOME PAY** are the amounts saved in the payroll. The left part shows the employee details, the monthly or daily rate, the pay period, the days worked and loans (the loan balances are shown as they were at that payroll, not as of today). The middle part shows the earnings and **TOTAL GROSS INCOME**. The right part shows the contributions, tax, other deductions, **NET TAKE HOME PAY** and the signature area.

With **View Summary** ticked, each employee also gets a "department - branch" heading, and a **Summary Report** is added at the end with the number of employees, Total Gross Pay, Total Deduction and Total Net Pay.

#### WORTH KNOWING

Note: Choose the Payroll Group before you click View. Clicking View without a payroll group gives an error.

The Department selection uses the department recorded on the payroll line, that is, the department at the time of the payroll. An employee who has moved since then is listed under the department of that payroll.

Company settings such as **Is Show Monthly Rate**, **Loan Balance**, **Non Taxable Income**, **Payslip Other Income Detail**, **Holiday Amount** and **Approved By** decide whether these items appear on the payslip.

There is no function to send payslips by e-mail. Print or save them from the PDF viewer.

When you sign in as a shared user, you cannot change Payroll Group or Branch, and the Department field is not shown.

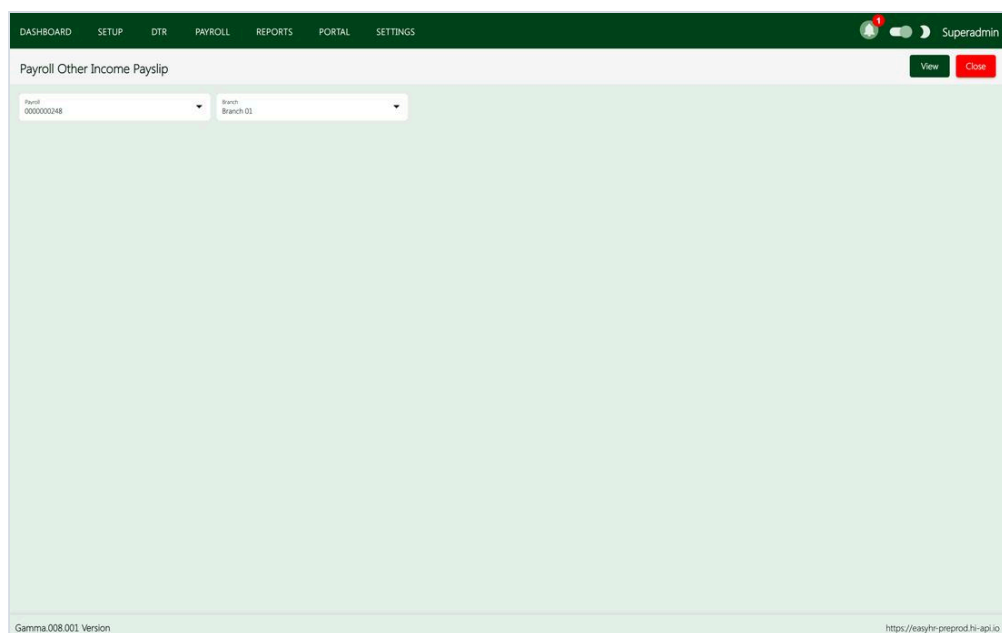
## 5.15 Payroll Other Income Payslip

A slip of the other income paid in one payroll. You choose a payroll and a branch, and the report prints, for each employee of that payroll who was paid other income, the lines of the Other Income document linked to the payroll (taxable and non-taxable) together with any Additional Allowance. The branch is the one recorded on the payroll line. It is not a separate pay run.

#### HOW TO GET THERE

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

The menu entry appears for users who have the **Demographics Reports** user right (Settings → Users). There is no separate right for this report.



Payroll Other Income Payslip — the screen as it opens

## WHAT TO DO

1. Open **REPORTS** → **Payroll Other Income Payslip**.
2. Choose the **Payroll**. The list shows payroll numbers only (no year, date or group). The newest payroll is selected when the screen opens.
3. Choose one **Branch**. There is no **ALL** option.
4. Click **View**. The report opens as a PDF in the viewer below. Use the viewer's buttons to download or print it.
5. Click **Close** to go back to the dashboard.

## FIELDS ON THIS SCREEN

Payroll Branch

## BUTTONS

View Close

## WHAT YOU SHOULD SEE

One block per employee: the company name, the payroll number and pay date, the Other Income number and date, the employee name, the income lines and a Total. The Total is the other income the payroll paid to that employee. The blocks follow each other and a block is not split across two pages; there is no page per employee and no signature area. Employees whose other income in the payroll is 0 are left out. If nothing matches, the report shows "No data found."

## WORTH KNOWING

If the Other Income document was changed after the payroll was computed, the slip adds a line "OTHER INCOME PAID (adjustment)" so that the lines always add up to what the payroll paid.

When you sign in as a shared user, you cannot change the Branch.

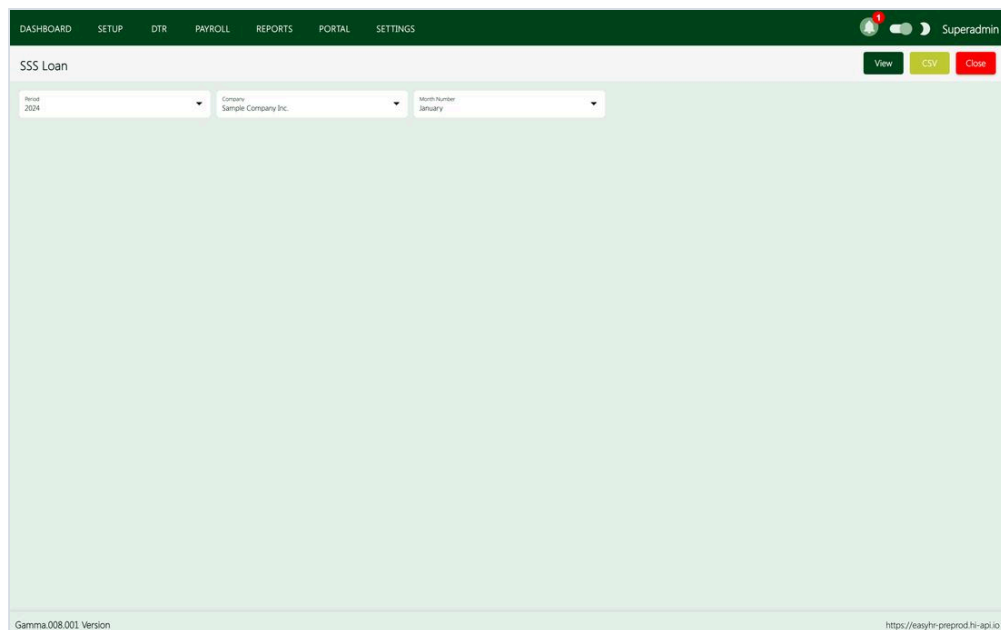
There is no CSV; the report is PDF only.

## 5.16 SSS Loan

The SSS salary loan deductions for one month, in the SSS "LMS DISKETTE / Detailed Listing of Employee Loans" layout.

### 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. Choose the **Period** (the year). The screen opens on the oldest year, so always choose the year you want.
3. Choose the **Company**. Only locked companies are listed.
4. Choose the **Month Number**. The screen opens on January.
5. Click **View**. The report opens as a PDF in the viewer below. Use the viewer's buttons to download or print it.
6. Click **CSV** instead to download the lines as a spreadsheet file.
7. Click **Close** to go back to the dashboard.

### FIELDS ON THIS SCREEN

Period Company Month Number

### BUTTONS

View CSV Close

### WHAT YOU SHOULD SEE

At the top: company name, print date and time, Employer No. (the SSS number on the company record) and Billing Month (the year and month you chose, for example 202610). Then the columns

SSS No., Employee Name, Payroll No., Loan Amount, Penalty and Total, a subtotal line for each employee, and a **GRAND TOTAL** at the end (the amount to remit). Penalty is always 0.00.

The CSV holds the lines, the subtotals and the Grand Total only; it does not include the company name, Employer No. or Billing Month.

#### WORTH KNOWING

The report picks up deduction lines whose deduction type name contains both **SSS** and **Loan** (for example "SSS Salary Loan" or "SSS Loan"; a name containing "Calamity" belongs to 5.17). The lines come from **locked** Other Deductions documents used in **locked** payrolls of the chosen year whose Month Number is the chosen month, and the employee must be in that payroll. There is one line for each payroll that took the deduction.

Employer No. is read from the SSS number on the company record (SETUP → Company). If that number is empty or "NA", the Employer No. is left blank; check it and the Billing Month at the top of the PDF before you submit it to SSS.

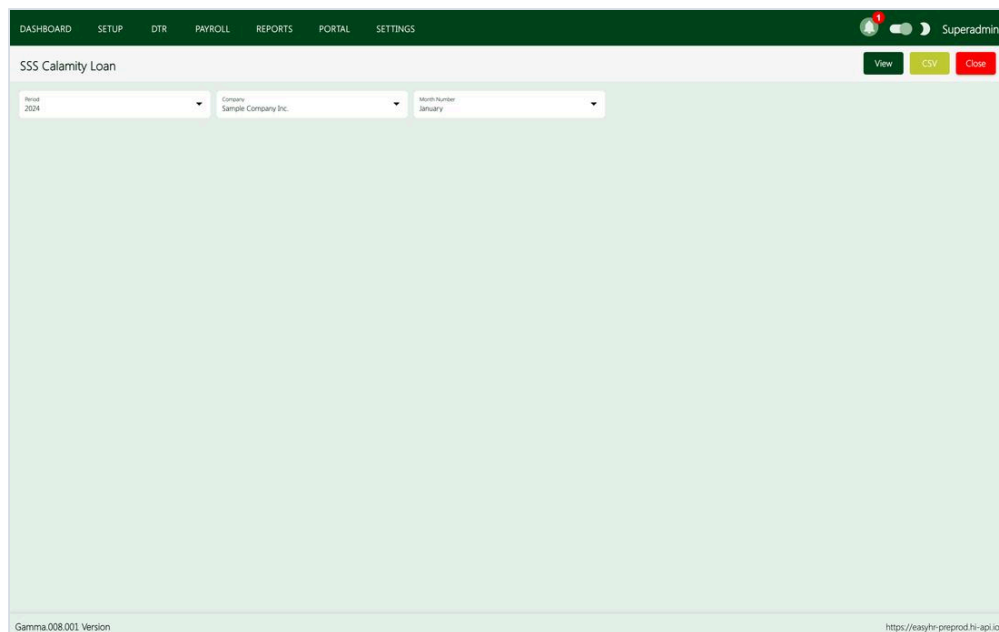
When you sign in as a shared user, the Company field is not shown.

## 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. Choose the **Period** (the year). The screen opens on the oldest year, so always choose the year you want.
3. Choose the **Company**. Only locked companies are listed.

4. Choose the **Month Number**. The screen opens on January.
5. Click **View**. The report opens as a PDF in the viewer below. Use the viewer's buttons to download or print it.
6. Click **CSV** instead to download the lines as a spreadsheet file.
7. Click **Close** to go back to the dashboard.

#### FIELDS ON THIS SCREEN

Period Company Month Number

#### BUTTONS

View CSV Close

#### WHAT YOU SHOULD SEE

The same "LMS DISKETTE / Detailed Listing of Employee Loans" layout as the SSS Loan report: company name, print date and time, Employer No. (the SSS number on the company record) and Billing Month (the year and month you chose) at the top; then SSS No., Employee Name, Payroll No., Loan Amount, Penalty (always 0.00) and Total, a subtotal line for each employee, and a **GRAND TOTAL** (the amount to remit).

#### WORTH KNOWING

The report picks up deduction lines whose deduction type name contains both **SSS** and **Calamity** (for example "SSS CALAMITY LOAN" or "SSS - Calamity"). The lines come from **locked** Other Deductions documents used in **locked** payrolls of the chosen year whose Month Number is the chosen month, and the employee must be in that payroll. There is one line for each payroll that took the deduction.

Employer No. is read from the SSS number on the company record (SETUP → Company). If that number is empty or "NA", the Employer No. is left blank; check it and the Billing Month at the top of the PDF before you submit it to SSS.

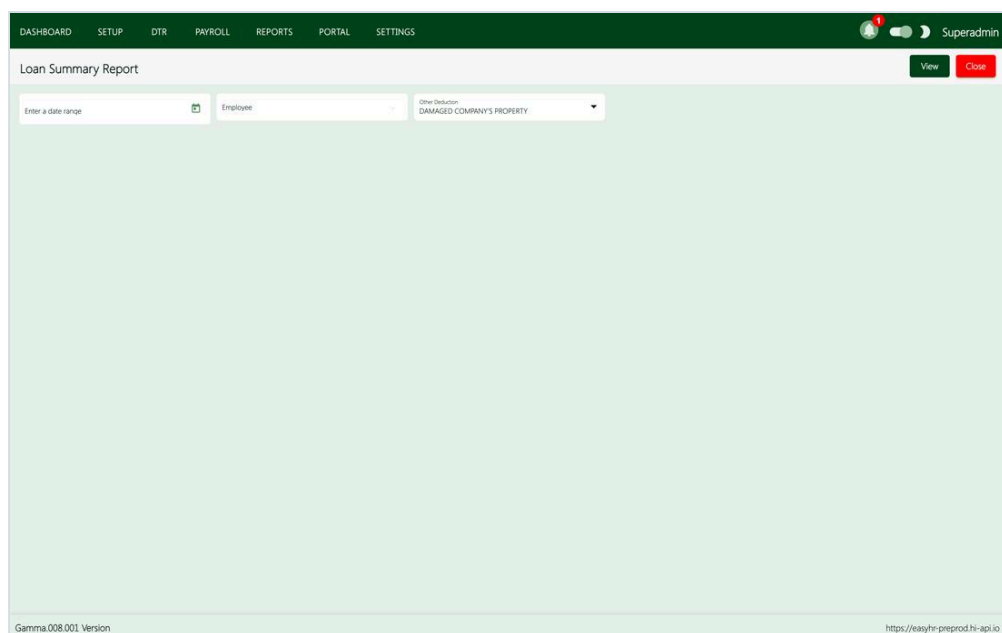
When you sign in as a shared user, the Company field is not shown.

## 5.18 Loan Summary Report

The locked loans of one deduction type for a date range, with the amount borrowed, the instalment, the amount paid and the balance as of the end of the range.

#### 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. Fill in **Enter a date range**. It is required. The balance is worked out as of the end date.
3. Choose one **Other Deduction** (the loan type). It is required.
4. Leave **Employee** empty to list every employee, or pick one employee. Once you have picked an employee you cannot clear the field; reopen the screen to go back to all employees.
5. Click **View**. The report opens as a PDF in the viewer below. Use the viewer's buttons to download or print it.
6. Click **Close** to leave the screen.

## FIELDS ON THIS SCREEN

Enter a date range Employee Other Deduction

## BUTTONS

View Close

## WHAT YOU SHOULD SEE

The report is headed **Loan Summary Report**, with "Balances as of" the end date and the print date. It lists the locked loans dated up to the end date that were taken in the range, still have a balance, or had a repayment in the range. One line per loan with the columns Date, Loan, Name, Loan Amount (amount borrowed), Amortization (amount of each instalment), No. of Pay. (repayments up to the end date), Paid Amount (repayments up to the end date), Balance (Loan Amount less Paid Amount, as of the end date) and Settled (ticked when the balance is 0). A TOTAL line adds up the amounts and balances. A balance marked \* differs from the balance saved on the loan today; a balance marked \*\* means the loan was repaid for more than its amount (the balance is shown as 0.00). If nothing matches, the report shows "Data not found."

## WORTH KNOWING

There is no CSV; the report is PDF only.

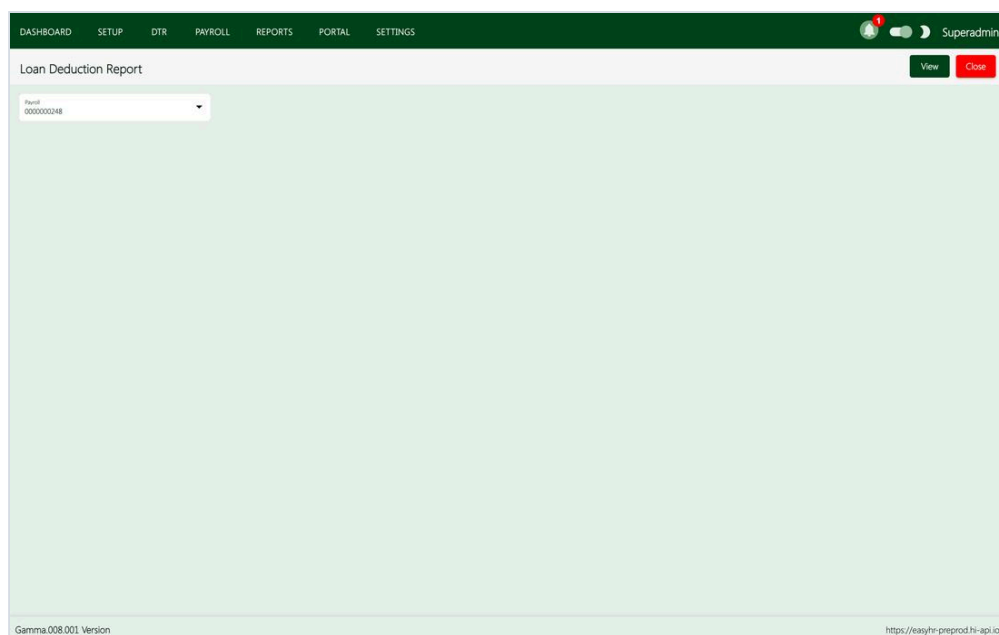
## 5.19 Loan Deduction Report

The loan deductions taken in one payroll, by loan type and employee.

### HOW TO GET THERE

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

The menu entry appears for users who have the **Demographics Reports** user right (Settings → Users). There is no separate right for this report.



Loan Deduction Report — the screen as it opens

### WHAT TO DO

1. Open **REPORTS → Loan Deduction Report**.
2. Choose the **Payroll**. The list shows payroll numbers only (no payroll group or period). The newest payroll is selected when the screen opens.
3. Click **View**. The report opens as a PDF in the viewer below. Use the viewer's buttons to download or print it.
4. Click **Close** to leave the screen.

### FIELDS ON THIS SCREEN

Payroll

### BUTTONS

View

Close

## WHAT YOU SHOULD SEE

The report is headed **Loan Deduction Report**, with the Other Deduction number and the payroll number. It lists only the deduction lines that are linked to a loan (other deductions such as HMO are not listed) and only for employees who are in the chosen payroll. The columns are Loan, Name and Amount, grouped by loan type, with a **Sub Total** for each loan type and a **GRAND TOTAL** at the end. If nothing matches, the report shows "Data not found."

## WORTH KNOWING

There is no CSV; the report is PDF only.

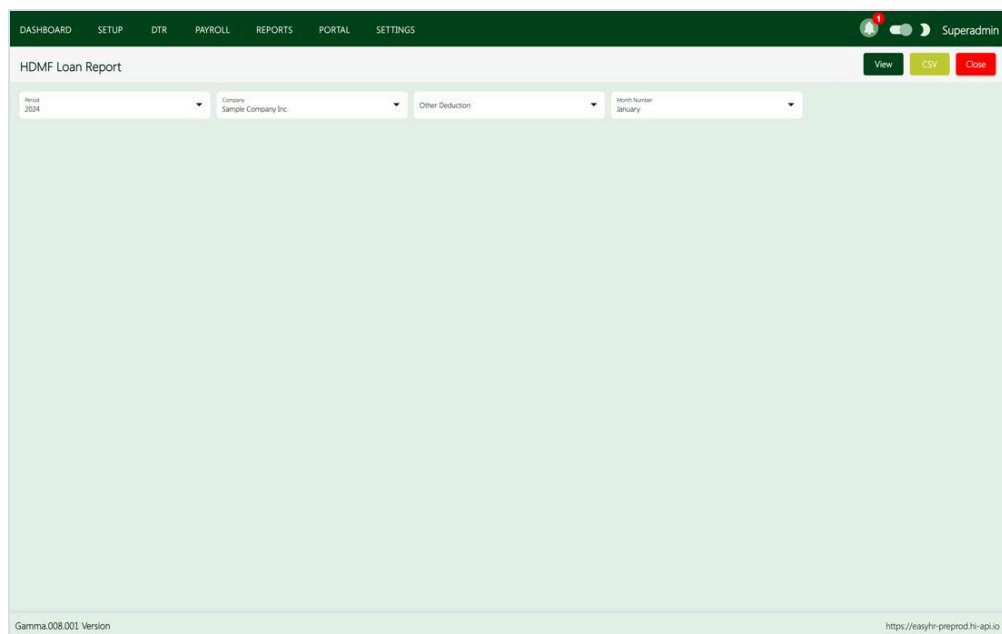
## 5.20 HDMF Loan Report

The Pag-IBIG (HDMF) loan deductions for a year or a month, listed per employee.

## HOW TO GET THERE

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

The menu entry appears for users who have the **Demographics Reports** user right (Settings → Users).



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**. The Other Deduction list shows only locked deduction types whose name contains both "HDMF" and "Loan".
3. Click **View**. The report opens as a PDF in the viewer below. Use the viewer's buttons to download or print it.
4. Click **CSV** instead to download the same lines 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 PDF is headed "Detailed Listing of Employee HDMF Loans", with the company, the period (year) and the month at the top. Below are the loan deductions per employee with the columns HDMF No., Employee Name, Payroll No., Amount, Penalty and Total, a **Sub Total** for each employee and a **GRAND TOTAL**. The CSV has the columns HDMF No., Name, Payroll No., Amount, Penalty and Total. Penalty is always 0. The list has no employer number, so it is not in a form you can hand to HDMF as it is. If nothing matches, the report shows "Data not found."

#### WORTH KNOWING

The report lists deduction lines of **locked** Other Deductions documents. **Month Number** is matched against the Month Number of the locked payroll in which the deduction was taken. The lines do not have to be linked to a loan record.

Note: Name your HDMF loan deduction type so that it contains both "HDMF" and "Loan" (for example "HDMF Loan"). A type named only "Pag-IBIG Loan" is not offered.

When you sign in as a shared user, the Company and Other Deduction fields are not shown.

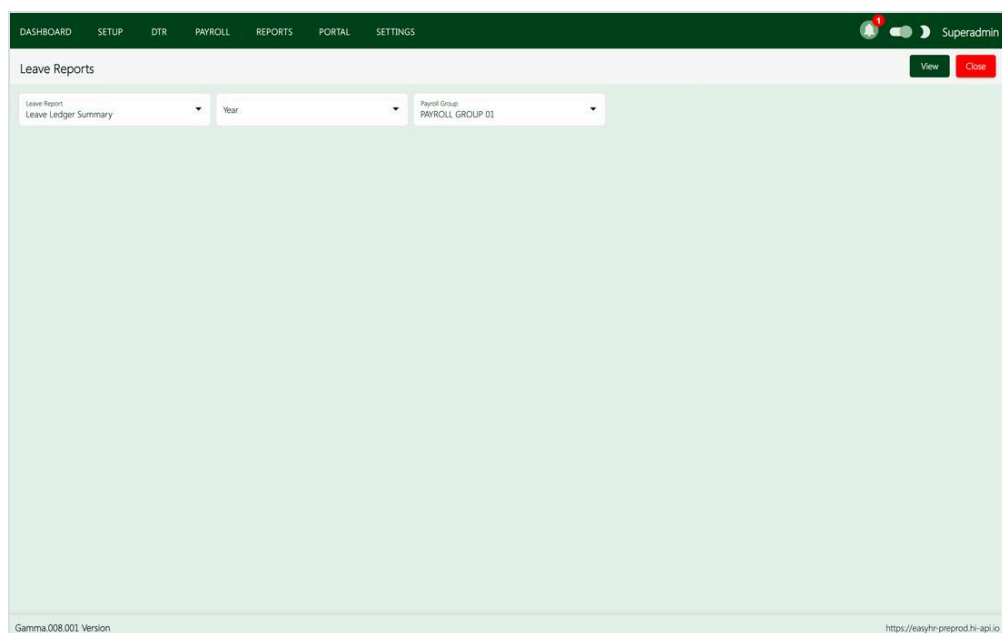
## 5.21 Leave Report

Leave taken and leave remaining, per employee and leave type, for one year. The screen is headed **Leave Reports**.

#### HOW TO GET THERE

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

The menu entry currently appears for users who have the **Demographics Reports** user right (Settings → Users).



Leave Reports — the screen as it opens

## WHAT TO DO

1. Open **REPORTS** → **Leave Report**.
2. In **Leave Report**, choose one of the four reports:
  - **Leave Ledger Summary** — leave granted, used (paid leave of locked applications only) and balance per employee and leave type.
  - **Leave Ledger** — the detail for one employee. Choose the **Employee** instead of the Payroll Group.
  - **Leave Application Detail** — the days on which leave was taken, with the employee, leave type, date, number of hours and remarks.
  - **Leave Application Summary** — the list of leave applications, with the LA date, period, LA number, employee and remarks.
3. Choose the **Year**. The field is empty when the screen opens; if you do not choose a year, the report is blank. Only locked years are listed.
4. Choose the **Payroll Group** (or the **Employee** for Leave Ledger).
5. Click **View**. The report opens as a PDF in the viewer below. Use the viewer's buttons to download or print it.
6. Click **Close** to leave the screen.

## FIELDS ON THIS SCREEN

Leave Report   Year   Payroll Group   Employee

## BUTTONS

View   Close

## WHAT YOU SHOULD SEE

The chosen report for the chosen year (not a date range). The reports select employees by the payroll group of the leave application, so an employee who has since resigned or moved to another group still appears in the report for an earlier year.

## WORTH KNOWING

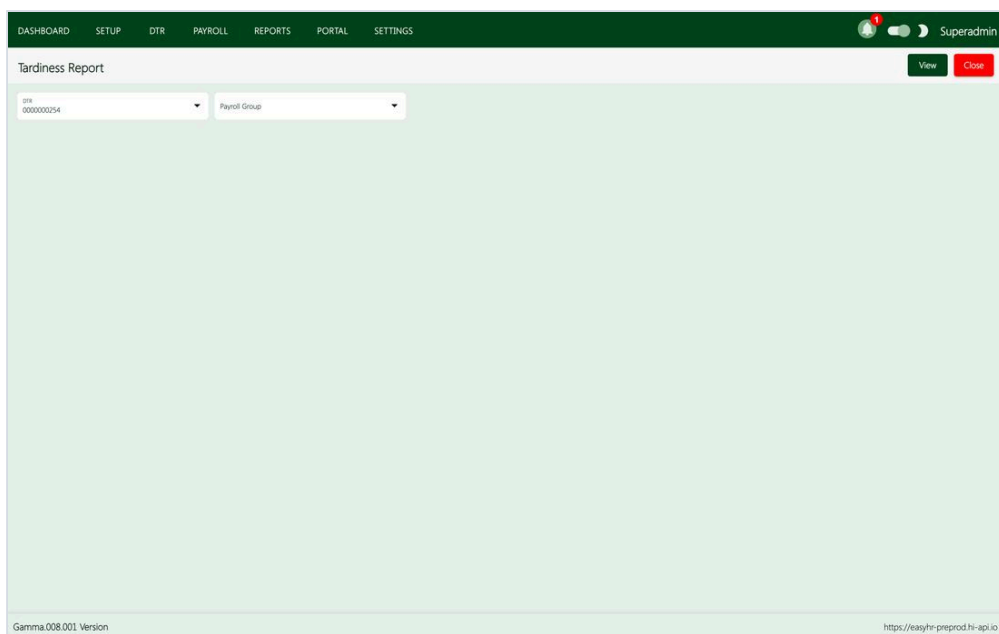
There is no CSV; the reports are PDF only.

## 5.22 Tardiness Report

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

### 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. Choose the **DTR** and the **Payroll Group**. The Payroll Group is required: it is empty when the screen opens, and clicking View without it gives an error.
3. Click **View**. The report opens as a PDF in the viewer below. Use the viewer's buttons to download or print it.
4. Click **Close** to leave the screen.

### FIELDS ON THIS SCREEN

DTR Payroll Group

### BUTTONS

View Close

### WHAT YOU SHOULD SEE

The report is headed "Tardiness Report - DTR" with the DTR number and payroll group, and the From and To dates of the DTR. It has one line per day an employee was late, including a day on which the employee was also late and left early (undertime). Late and UT are shown in minutes.

Each employee has a total line for the Reg hours and the Late and UT minutes. There is no grand total for the whole report.

#### WORTH KNOWING

The Payroll Group must be the payroll group of the DTR you chose; otherwise the report shows "No tardiness found for this DTR and payroll group." The same message appears when nobody was late.

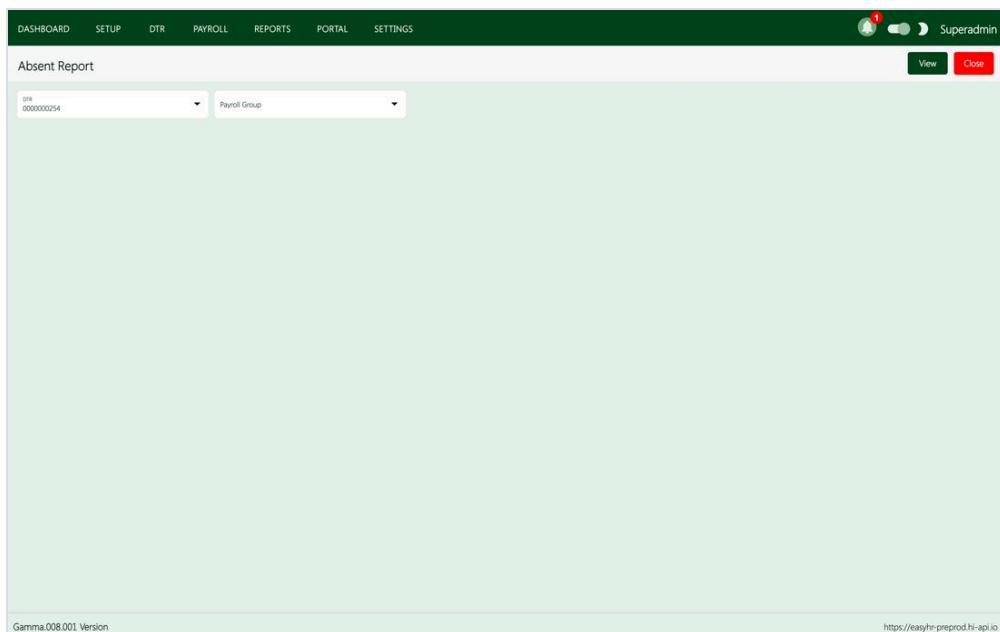
## 5.23 Absent Report

Absences in one DTR, per employee and per day. The period is the period of the DTR.

#### HOW TO GET THERE

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

The menu entry appears for users who have the **Demographics Reports** user right (Settings → Users).



Absent Report — the screen as it opens

#### WHAT TO DO

1. Open **REPORTS → Absent Report**.
2. Select a locked **DTR**. Only locked DTRs are listed.
3. Choose the **Payroll Group**. It is required (clicking View without it gives an error) and must be the payroll group of the DTR; otherwise the report shows "No absences found for this DTR and payroll group.".
4. Click **View**. The report opens as a PDF in the viewer below. Use the viewer's buttons to download or print it.
5. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

DTR

Payroll Group

## BUTTONS

[View](#)[Close](#)

## WHAT YOU SHOULD SEE

The report is headed "Absent Report - DTR" with the DTR number and payroll group, and the From and To dates of the DTR. For each employee, one line per day of absence with Date, DTR Number, Type, R / OB / OL / A, In / Out times, Reg, Days (1.00 for a whole day, 0.50 for a half day) and Deduction (the amount deducted for the absence), followed by a total line for Reg, Days and Deduction. Half-day absences are listed. If nothing matches, the report shows "No absences found for this DTR and payroll group." and a DTR that is not locked shows "DTR NOT FOUND!".

## WORTH KNOWING

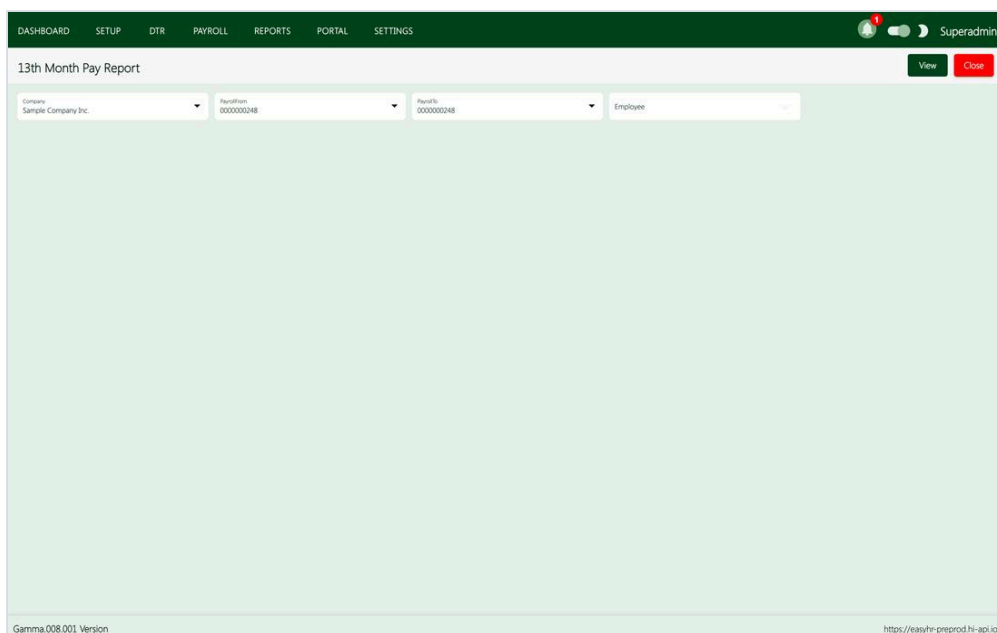
The report uses the payroll group of the DTR, so employees who have resigned or moved to another group since the DTR was made still appear.

## 5.24 13th Month Pay Report

The 13th month pay per employee, by department. For each employee the report shows the 13th month base (basic pay plus the kinds of pay the company record says to include, less absences, late and undertime) and one twelfth of it as the 13th month pay. Which kinds of pay are included is set on the company record. The period is the range of payrolls you choose; it is not cut off by calendar year automatically.

## 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. Choose the **Company**. Only locked companies can be reported.

3. Choose **PayrollFrom** (the first payroll of the year) and **PayrollTo** (the last payroll of the year). Only locked payrolls are counted. When the screen opens, both are set to the latest payroll, which covers one payroll only.
4. Leave **Employee** empty for every employee, or pick one employee. To go back to all employees, reopen the screen.
5. Click **View**. The report opens as a PDF in the viewer below. Use the viewer's buttons to download or print it.
6. Click **Close** to leave the screen.

#### FIELDS ON THIS SCREEN

Company

PayrollFrom

PayrollTo

Employee

#### BUTTONS

View

Close

#### WHAT YOU SHOULD SEE

By department: each employee's 13th month base and 13th Month amount, a total for each department and a grand total.

#### WORTH KNOWING

There is no CSV; the report is PDF only.

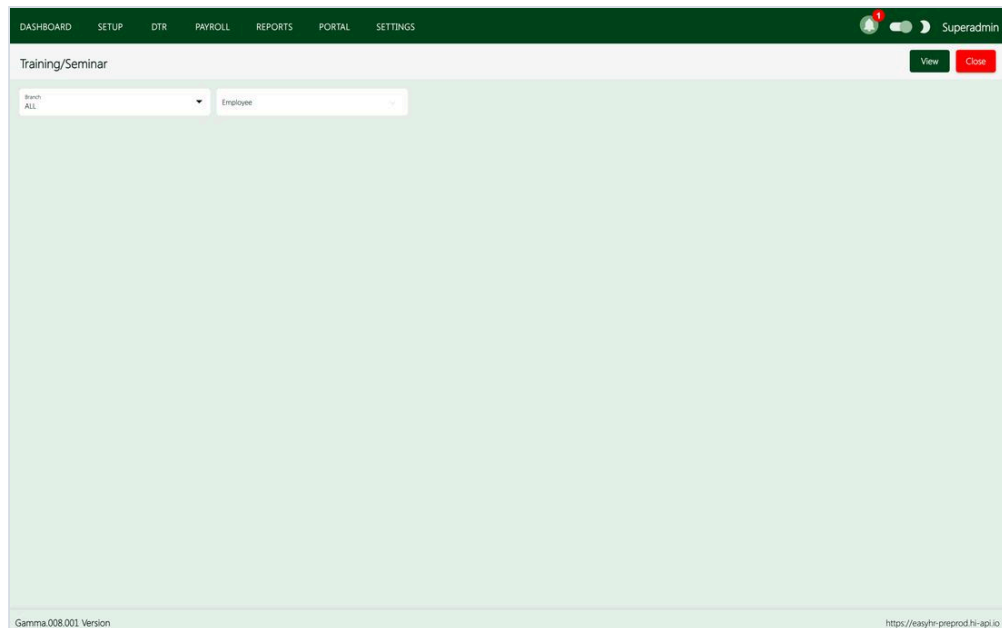
## 5.25 Training Report

The training and seminars recorded on the employee records, so that attendance can be reviewed across the workforce. The menu shows it as **Training** and the screen is headed **Training/Seminar**.

#### HOW TO GET THERE

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

The menu entry appears for users who have the **Demographics Reports** user right (Settings → Users).



Training Report — the screen as it opens

## WHAT TO DO

1. Open **REPORTS** → **Training**.
2. Choose the **Branch** (**ALL** by default).
3. Leave **Employee** empty for every employee, or pick one employee. Once picked, the field cannot be cleared; reopen the screen to go back to all employees.
4. Click **View**. The report opens as a PDF in the viewer below. Use the viewer's buttons to download or print it.
5. 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, with the columns Branch, Employee Name, Training and Seminar Date, in employee-name order. The data comes from the Training/Seminar entries on the employee records, and Branch is the employee's current branch. Choosing a Branch lists only the employees of that branch; deleted employees are not listed. There are no totals. If nothing matches, the report shows "No records found."

## WORTH KNOWING

There is no CSV; the report is PDF only.

## 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, locked DTRs, payslips, loan balances and 13th month, and file overtime, leave and change shift applications that go to their approver.

#### HOW TO GET THERE

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

An employee who has only the portal right goes straight to the portal when they sign in; it is the only screen they can open. A user who also has HR rights, or an administrator, opens it from the dashboard with **PORTAL → Employee Portal** and sees the record of the employee linked to their own user account.

Employee Portal — the screen as it opens (DTR Logs tab)

#### WHAT TO DO

1. The employee signs in with their own user name and password.
2. The portal opens on their own record. It has nine tabs: **DTR Logs**, **OT Application**, **Leave Application**, **Change Shift**, **DTR**, **Payroll**, **Other Income Payslip**, **Loan** and **13th Month**.
3. **DTR Logs** lists their time logs and lets them file a log. **DTR** lists their locked DTRs; click **View** to see one, then **Print** or **CSV**.
4. To see a payslip, open **Payroll**, click **View** on the payroll, then **View** on their payslip line to open the PDF. **Other Income Payslip** works the same way.
5. To see the 13th month, open **13th Month**, choose the **Year** and click **View** to open the PDF.
6. **Loan** shows their loan balances.
7. To file an application, open **OT Application**, **Leave Application** or **Change Shift**, click **ADD**, choose the document number, fill in the details (the Remarks you type are saved with your

application) and save.

An employee can only file an application when HR has created an unlocked Overtime Application, Leave Application or Change Shift document for that year in the employee's payroll group. If there is none, the screen shows "There is no open application document. Please contact HR."; ask HR to create one.

#### COLUMNS ON THIS SCREEN

These are the columns of the **DTR Logs** tab.

Edit Number Year Date DateType In Out

#### FILTERS

Year

#### BUTTONS

Close Change Password ADD

**Close** is not shown to an employee who has only the portal right. **Change Password** asks for the **Current Password**, the **New Password** and **Confirm Password**.

#### OT APPLICATION

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

#### LEAVE APPLICATION

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

#### CHANGE SHIFT

**Columns:** Edit Delete CSNumber Year ShiftDate Shift Employee Branch Approved  
Remarks

PAYROLL

DASHBOARD

SETUP

DTR

PAYROLL

REPORTS

PORTAL

SETTINGS

1

Superadmin

Employee Portal

Close

Change Password

Employee Code:

ID No.:

Biometric No.:

Fullname:

Company:

Address:

Branch:

Landline No.:

Position:

Mobile No.:

Payroll Group:

Announcement

Announcement Date

LEAVE TYPE

LEAVE BALANCE

DTR Logs

OT Application

Leave Application

Change Shift

DTR

PAYROLL

Other Income Payslip

Loan

13th Month

Year

2026

Pay No.

T

Date

T

Year

T

Remarks

T

Prepared By

T

Locked

T

<<

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1 / 0

>

>>

Gamma.008.001 Version

https://easyhr-preprod.hi-api.io

Employee Portal — the employee's own payslips

Columns: Pay No. Date Year Remarks Prepared By Locked

OTHER INCOME PAYSリップ

Columns: Year Payroll Other Income Number Date Remarks Prepared By Locked

LOAN

DASHBOARD

SETUP

DTR

PAYROLL

REPORTS

PORTAL

SETTINGS

1

Superadmin

Employee Portal

Close

Change Password

Employee Code:

ID No.:

Biometric No.:

Fullname:

Company:

Address:

Branch:

Landline No.:

Position:

Mobile No.:

Payroll Group:

Announcement

Announcement Date

LEAVE TYPE

LEAVE BALANCE

DTR Logs

OT Application

Leave Application

Change Shift

DTR

PAYROLL

Other Income Payslip

Loan

13th Month

Number

T

Date

T

Employee

T

Other Deduction

T

DocRef

T

Amortization

T

Loan Amount

T

Paid Amount

T

Balance Amount

T

Status

T

Remarks

T

<<

<

1 / 0

>

>>

Gamma.008.001 Version

https://easyhr-preprod.hi-api.io

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 goes to the approver, who is notified by a notification and an e-mail. Only an approved application is applied, and only to the DTR that the application's document names. Payslips, DTRs and the 13th month open as the employee's own records, and the employee can print them.

#### 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 for the employee linked to their own user account, with the menu and **Close** still shown.

## 7. Settings

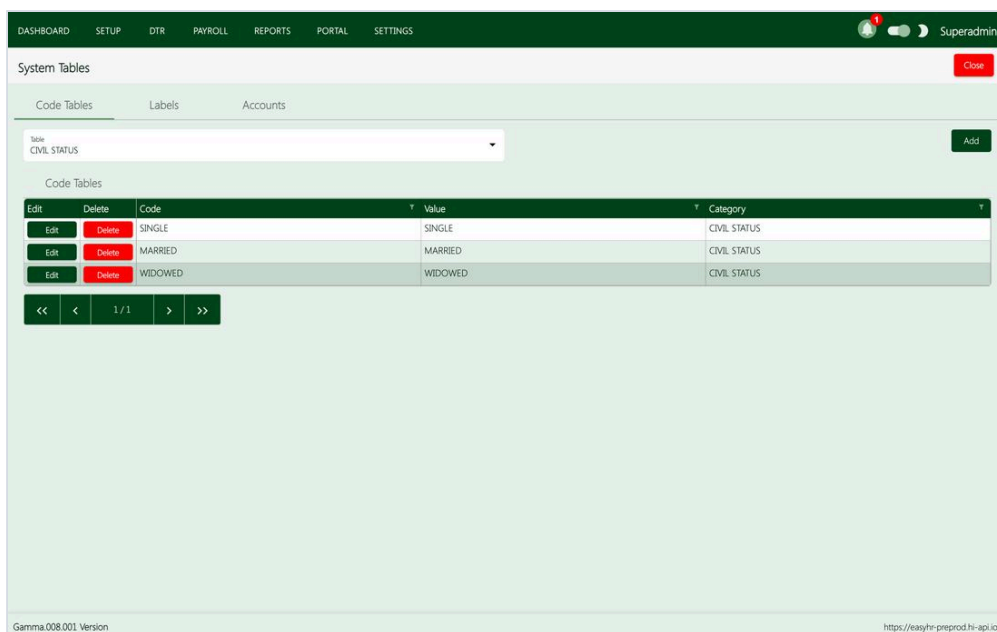
System-wide configuration, the record of who changed what, and the link to other Human Incubator products.

### 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. On **Code Tables**, choose the **Table** to work on.
4. Click **Add** for a new entry, or **Edit** an existing one. The form has **Code**, **Value** and **Category**.
5. Click **Save**, or **Cancel** to leave without saving.

The **Code** and **Value** are required, and the same **Value** cannot be used twice in one table. The **Category** of an existing entry cannot be changed; if you try, the message "Category cannot be changed." is shown.

#### COLUMNS ON THIS SCREEN

Edit Delete Code Value Category

#### FILTERS

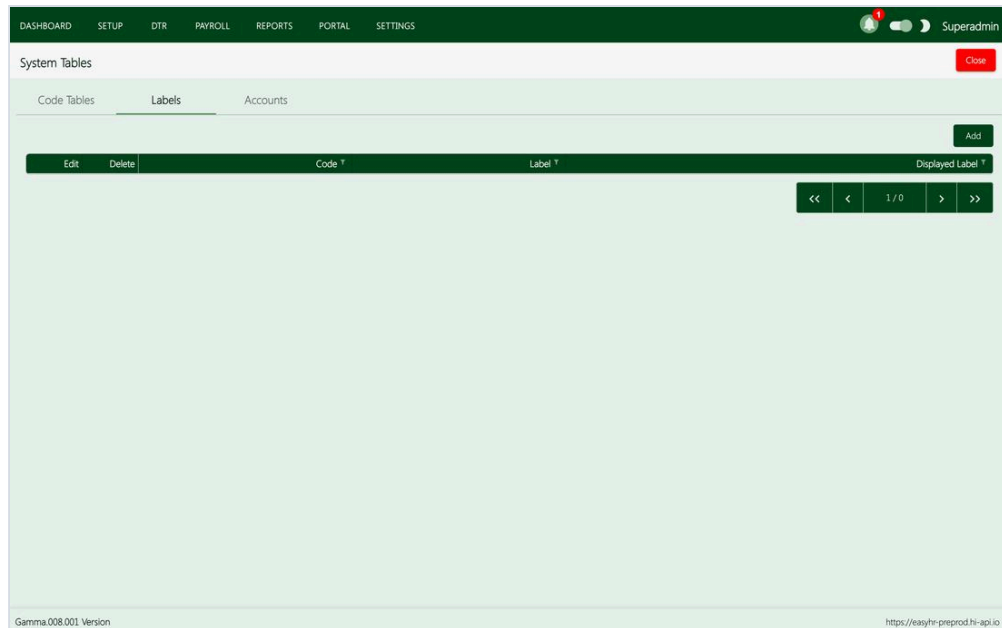
Table

The **Table** filter is on the **Code Tables** tab only. The tables are listed in alphabetical order. The **SYSTEM CATEGORY** and **INTEGRATION** tables are for system administration and are not listed.

## BUTTONS

Close Add Edit Delete

## LABELS



System Tables — Labels

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

Click **Add**, enter the **Label** and the **Displayed Label** (both are required, up to 50 characters each) and click **Save**. **Edit** and **Delete** work in the same way. The **Code** is given by the system.

Note: the labels you save here are kept in the list, but the screens do not use them yet. A screen keeps its normal wording after you add or change a label.

## ACCOUNTS

|      |        | Code *     | Account Code * | AccountName *      | Description *      |
|------|--------|------------|----------------|--------------------|--------------------|
| Edit | Delete | 0000000003 | NA             | Other Deduction    | Other Deduction    |
| Edit | Delete | 0000000002 | NA             | Other Income       | Other Income       |
| Edit | Delete | 0000000001 | NA             | Salaries and Wages | Salaries and Wages |

System Tables — Accounts

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

**Code** is a number the system gives. **Account Code** is the account code you enter yourself.

The **Sync** button sends the accounts to easyFS. It is used only when easyHR is linked to easyFS (see 7.4 System Integration).

The journal voucher looks up its accounts by **AccountName** (for example Salaries and Wages, Other Income, Other Deduction, SSS Expense and Cash). Do not rename these accounts.

### 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. Spaces are fine. The screen checks this only when you add an entry, not when you edit one, so take the same care when editing. Spaces at the beginning or end of an entry are removed when you save.

A **Value** that is already in use (for example a department, position, branch, payroll group or bank that employees or other records refer to) cannot be deleted or renamed. The message says how many records use it, for example "... is in use (3 record(s)) and cannot be deleted." To retire it, first change those records to another value, then delete it. The delete question shows the code and the value, so you can see which entry you are removing.

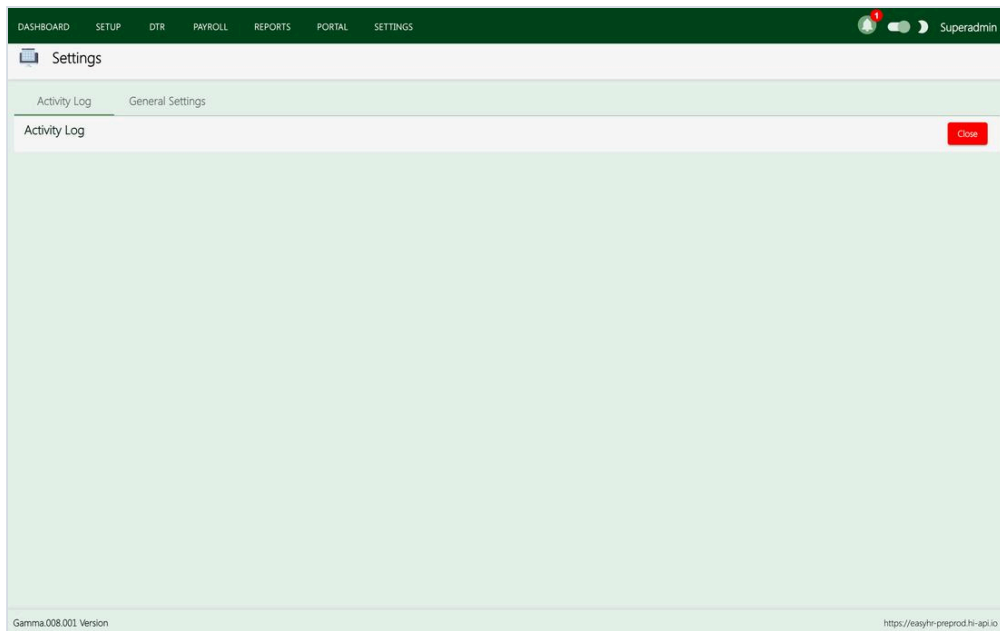
## 7.2 Settings

The Settings screen holds the system-wide setting for the number of employees (**General Settings**) and, on the demonstration site, a tool for clearing demonstration data (**Activity Log**). It is not a record of who did what; for that, use 7.3 Employee History and 7.5 Audit Trail.

## HOW TO GET THERE

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

The menu entry is shown only to the superadmin (on the demonstration site, to everyone).



Settings — the screen as it opens (Activity Log tab)

## WHAT TO DO

1. Open **SETTINGS → Settings**.
2. The **Activity Log** tab is a data-clearing tool for the demonstration site (**Clear all / Delete Transaction** delete all payrolls, DTRs, leave, overtime, change shift and other transactions). On your own company's system it is empty.
3. The **General Settings** tab holds the **Employee Limit**. To change it, click **Unlock**, change the value, click **Save**, then **Lock**. While the setting is locked, Save is refused with "General setting is locked."

## BUTTONS

Save Lock Unlock Close

## GENERAL SETTINGS

**Fields:** Employee Limit

**Employee Limit** is the maximum number of employees for the whole company, as set in your contract. It is set by Human Incubator; you cannot change it yourself. When the limit is reached, no more employees can be added and the message "You reach the maximum limit of employees." is shown.

## WHAT YOU SHOULD SEE

The **Activity Log** tab lists nothing on your company's system. The **General Settings** tab shows the employee limit.

## WORTH KNOWING

Note: on the demonstration site, **Clear all** and **Delete Transaction** delete data for good. Do not use them on data you want to keep.

## 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

You need the Settings right and also the right to open Employee Detail. Without the second right the list is empty.

| 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. There are no filter fields above the list. Use the funnel in a column heading to filter by Field Name, date and so on.
3. To see the history of one employee, go to **Setup → Employee**, open the employee's **Detail** and use the **Change History** tab.
4. The list shows 15 lines per page; use the page buttons below it to move between pages.
5. There is no Close button. Use the menu to go to another screen.

### COLUMNS ON THIS SCREEN

Code   Date   Field Name   Old Value   New Value   Edited By   Date

The last **Date** is the date of the change.

Note: the list has no employee column. To check whose record was changed, use the employee's **Change History** tab.

#### WHAT YOU SHOULD SEE

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

Changes are recorded for fields such as name, address, date of birth, date hired, department, position, employment status, approver, shift, payroll group, mode of payment, bank, rates, SSS, HDMF, PHIC and TIN numbers, and bank account number. A **FullName** line appears only when a part of the name was really changed.

#### WORTH KNOWING

The history is written automatically and cannot be edited.

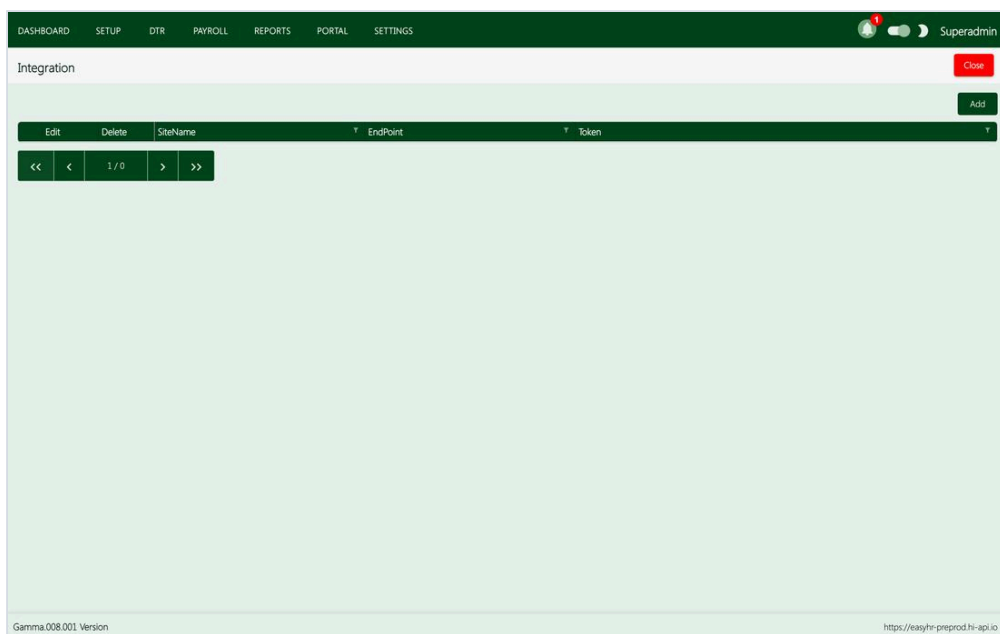
## 7.4 System Integration

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

The screen title is **Integration**. It needs the **System Tables** user right; there is no separate right for it.



System Integration — the screen as it opens

#### WHAT TO DO

1. Open **SETTINGS → System Integration**.
2. Click **Add**.
3. **Site name**: choose **EasyFS**. This choice comes from the **INTEGRATION** category of the code tables, which must have an EasyFS entry. If the list is empty, ask Human Incubator to add it.

4. **EndPoint:** enter the URL of the easyFS API, without `/api` at the end. It must be a secure address that starts with `https://` and points to a public server; an address with a user name in it, or an address inside a private network, is refused.
5. **Token:** enter the token for the easyFS connection, then save.

Only the first line whose Site name is EasyFS is used. **Edit** opens an empty form, so to change a line, delete it and add it again.

#### COLUMNS ON THIS SCREEN

[Edit](#) [Delete](#) [SiteName](#) [EndPoint](#) [Token](#)

#### BUTTONS

[Close](#) [Add](#)

**Delete** asks "Delete Integration?" before it removes the line.

#### WHAT YOU SHOULD SEE

Once the link is saved, send the payroll from **REPORTS → Journal Voucher**: choose the payroll and click **Integrate**. Send the accounts first with **System Tables → Accounts → Sync**.

#### 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.

Treat the **Token** like a password. Do not share it or copy it into other documents.

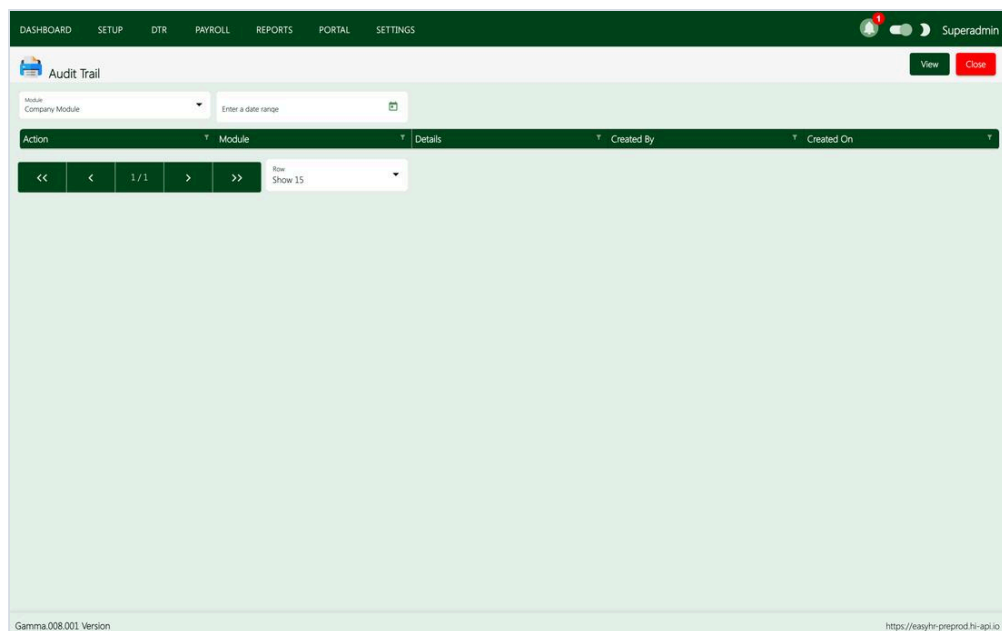
## 7.5 Audit Trail

The record of what each user did: the additions, changes, deletions, locks and unlocks they made in settings, DTRs, payroll and other modules, with who did it and when.

#### HOW TO GET THERE

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

The menu entry is shown only to users who have been given the **Audit Trail** right (**Settings → Users → rights**). At first no user has it.



Audit Trail — the screen as it opens

## WHAT TO DO

1. Open **SETTINGS** → **Audit Trail**.
2. Choose the **Module** (there are 14 to choose from).
3. Enter a date range. The date range is required; keep it short, because a long range takes time to load. The last day of the range is included, so one day can be viewed by choosing the same date for both ends.
4. Click **View**.
5. Click **Click to show details** on a line to see what was recorded.
6. Use **Row** (Show 15 to 200) and the page buttons to move through the list.

## COLUMNS ON THIS SCREEN

Action   Module   Details   Created By   Created On

**Action** is one of **ADD**, **UPDATE**, **DELETE**, **LOCK** or **UNLOCK**. **Created On** shows the date and the time. The **Module** column shows the name of the screen (for example Payroll or DTR). For an **UPDATE**, **Click to show details** lists each field that changed with its **Before** and **After** value.

## FILTERS

Module   Enter a date range   Row

## BUTTONS

View   Close

## WHAT YOU SHOULD SEE

One line per logged action, newest first. Passwords in the details are shown as \*\*\*.

## WORTH KNOWING

Sign-ins and IP addresses are not recorded.

Note: changes made in the Employee module are not recorded here at present. Use 7.3 Employee History for changes to employee records.

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.

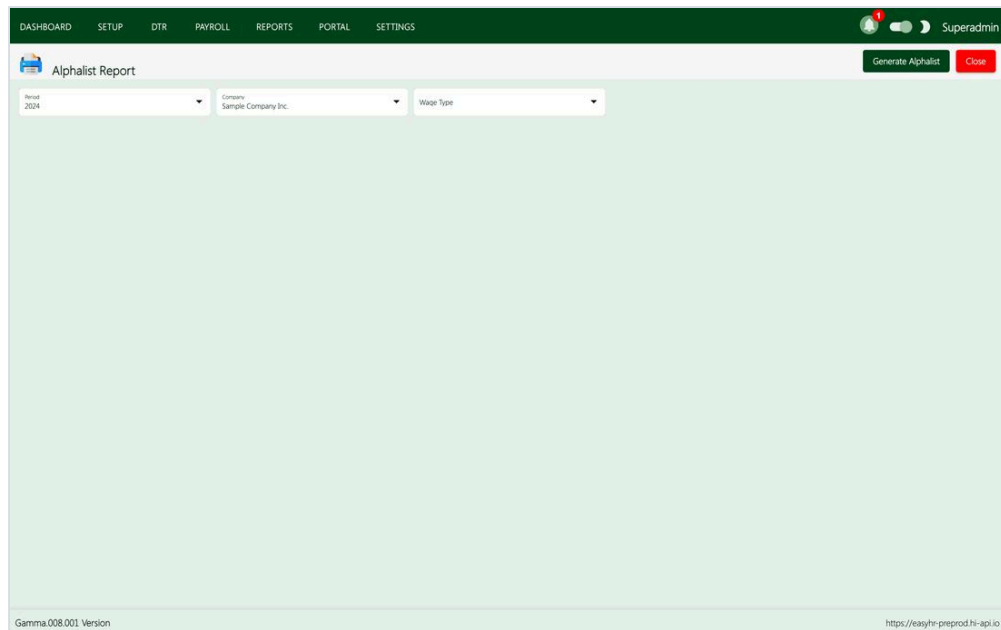
### 8.1 Alphalist

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.

Note: Before you submit the alphalist to BIR, check the tax withheld, the 13th month pay and the basic salary of each employee against your payroll records for the year. The PDF and the DAT file can show different amounts.

## 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 needs the **Form 2316 Report** user right (Settings → Users → rights).

Form 2316 — the screen as it opens

### WHAT TO DO

1. Open **REPORTS → Form 2316**.
2. Choose the **Period** (tax year) first — it opens on the oldest year. Then set **Company**, **Employee** and **Authorized Agent**.
  - Leave **Employee** empty to print every employee of the company. Pick one employee to print only that person. (To go back to all employees, reopen the screen.)
  - **Authorized Agent**: the name printed in item 53 (Present Employer / Authorized Agent signature over printed name).
  - **Enter a date range** appears only when the company setting **Show 2316 date range** is on. When set, only employees who resigned within the range are printed (for last pay).
3. Click **Generate 2316**. The PDF opens in the viewer below, one page per employee (it can take a while for many employees). Use the viewer's download / print buttons to save or print.
4. Click **Close** to leave the screen.

## FIELDS ON THIS SCREEN

Period

Company

Employee

Authorized Agent

Enter a date range

## BUTTONS

Generate 2316

Close

## WHAT YOU SHOULD SEE

One page (BIR Form 2316, September 2021 ENCS) per locked employee of the company, sorted by last name. Amounts are totals of the locked payrolls of the year (months 1–12). Employees need HR and payroll information and a TIN in the Employee record.

Note: Before you give the forms to employees, check the tax amounts on the form against your payroll records for the year.

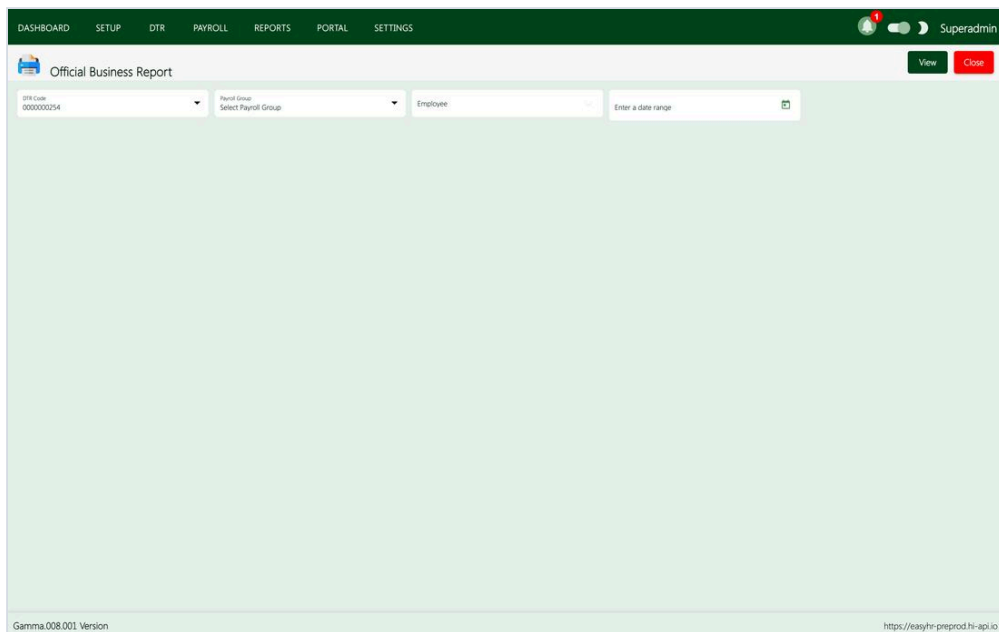
## 8.3 Official Business Report

The Official Business IN and OUT logs that employees record in the Employee Portal (mobile), listed per employee and per day, with the total hours.

## HOW TO GET THERE

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

The menu entry appears only when the user has the **Official Business Report** right (Open) in Settings → Users. Superadmin does not have it at first either.



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**. You must choose a **DTR Code** (one only) and a date range; without a date range the screen asks you to enter the start date and the end date. Leave **Payroll Group** and **Employee**

empty for everyone. Once you pick an employee you cannot clear the field; reopen the screen to go back to everyone.

3. Click **View**. The report is built and opened in the viewer as a PDF. There is no CSV.
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

For each employee and day, a heading with Name and DTR Number, then one line per log (Date, Time, Log Type IN/OUT, Remarks), and Total Hours at the end.

The logs of an employee are listed by date and time. **Total Hours** adds up each IN that is followed by an OUT, so the time between an OUT and the next IN (for example a lunch break) is not counted. An IN with no OUT after it, or an OUT with no IN before it, adds nothing. A report with no logs shows "No Data".

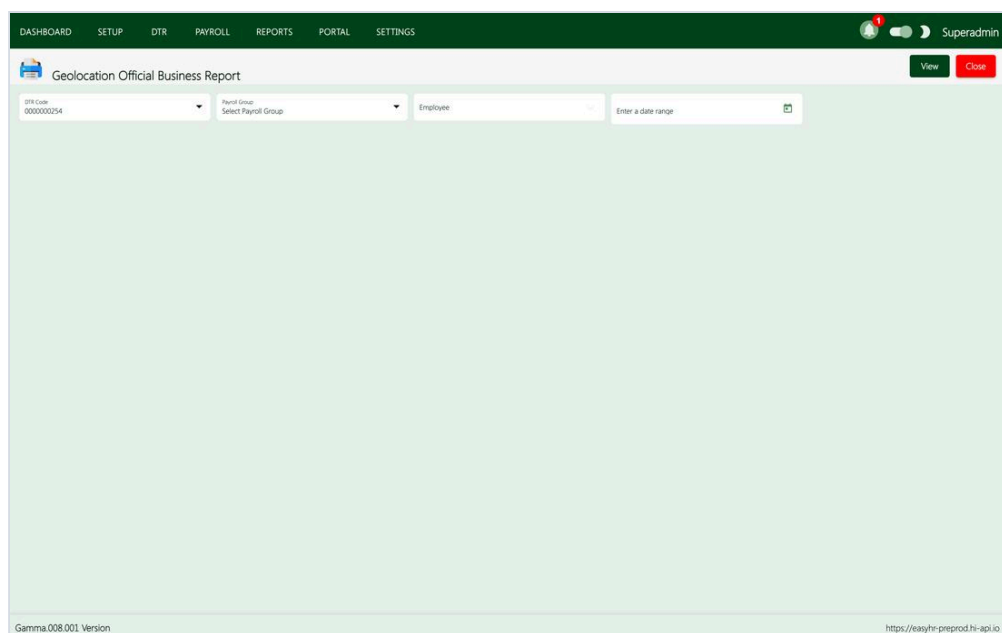
## 8.4 Geolocation Official Business Report

The same as the official business report, with the location of each log 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 appears for users with the **Geotagging Report** right (the same right as the Geolocation Report).



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**. Choose a DTR that has official business logs. Leave **Payroll Group** and **Employee** empty for everyone. Always enter the date range; without it the screen asks you to enter the start date and the end date.
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

For each employee, Name and DTR Number, then one line per log (Date, Time, Log Type, Remarks, Location), and Total Hours at the end. Location is **Nearby home**, **Nearby work address 1** or **Nearby work address 2** when the log is within the company's Geolocation Radius of that address, **Out of range** when it is not, and **No location** when no location was recorded. Under the location, the latitude and longitude of the log are printed with five decimals. The logs of an employee are listed by date and time, and **Total Hours** adds up each IN followed by an OUT.

## 8.5 Geolocation Report

For logs recorded with a location (portal or mobile logs, for example when working from home): the date, time and log type, and whether the log was near the employee's addresses (Nearby home / Nearby work address 1 / Nearby work address 2 / Out of range), with the latitude and longitude of

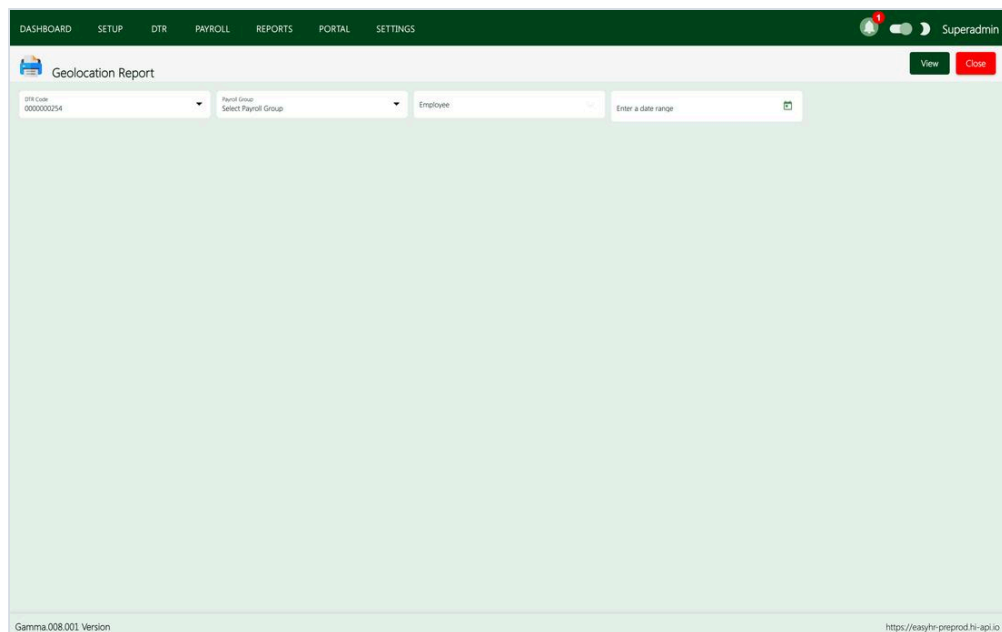
the log. Only logs that have a location are listed; logs imported from a time recorder or biometric device have none and are left out.

## HOW TO GET THERE

### REPORTS → Geolocation Report </software/geolocation-report>

The menu entry appears for users with the **Geotagging Report** right (the same right as the Geolocation Official Business Report).

Before you start, enter the employee's home address, work address 1, work address 2 and postal code (SETUP → Employee), and set **Geolocation Radius (m)** in Company Detail. If the radius is 0 or empty, 100 metres is used. The addresses are looked up on a map; the more complete the address (street, barangay and city), the more exact the position.



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**. **DTR Code** and the date range are required; without a date range the screen asks you to enter the start date and the end date. Leave **Payroll Group** and **Employee** empty for everyone.
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

For each employee, Name and DTR Number, then one line per log (Date, Time, Log Type, Location with latitude and longitude), listed by date and time, and Total Hours (each IN followed by an OUT) at the end.

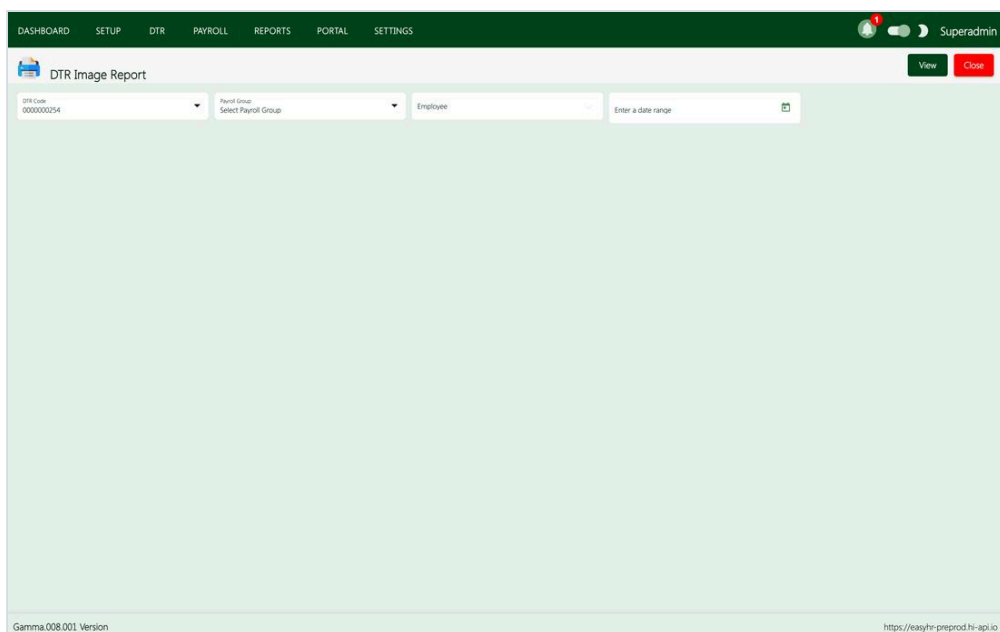
## 8.6 DTR Image Report

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 appears only when the user has the **DTR Image Report** right (Open) in Settings → Users. Superadmin does not have it at first either.



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**. You must choose a **DTR Code** (one only) and a date range; without a date range the screen asks you to enter the start date and the end date. Leave **Payroll Group** and **Employee** empty for everyone. Once you pick an employee you cannot clear the field; reopen the screen to go back to everyone. A report can hold at most 500 logs; for more, the message "Too many punches ... Please select an employee or a shorter period." is shown.
3. Click **View**. The report is built and opened in the viewer as a PDF. There is no CSV.
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 report is titled DTR Image Report. A heading for each employee (and DTR number), then the logs of the employee in date and time order, four across, each with its Time and Log Type (IN/OUT) and the photograph taken at the time. **No Image** means no photograph was taken; **Image Not Available** means the photograph could not be loaded.

Photographs exist only when the company uses logs with photographs and the employee logged in the Employee Portal (mobile). Logs imported from a time recorder have no photograph.

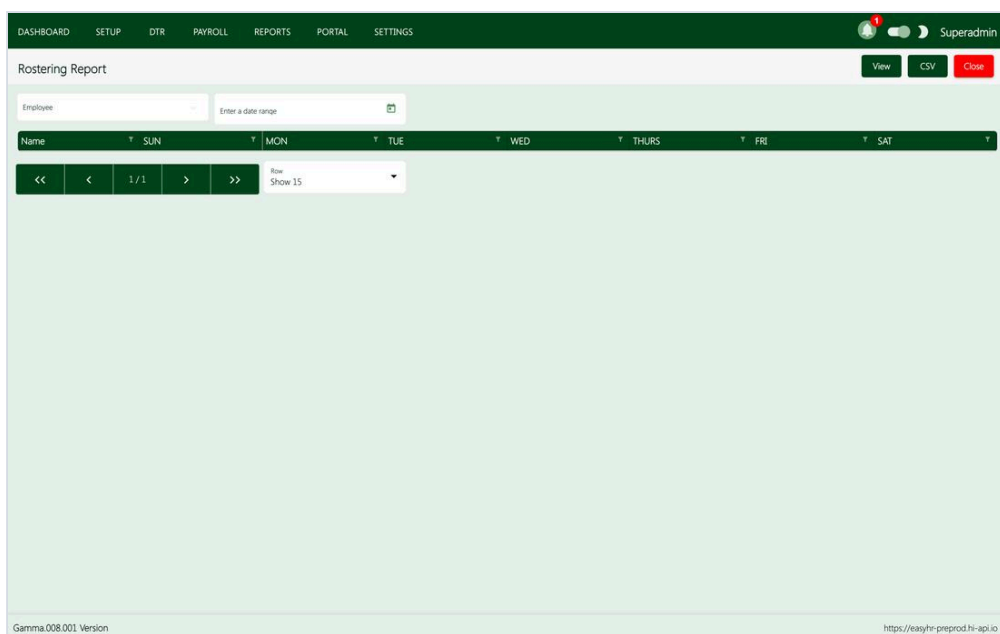
## 8.7 Rostering Report

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 appears only when (1) **Is Show Rostering Feature** is on in Company Detail (see 9.1 Turning rostering on) and (2) the user has the **Rostering Report** right (Open) in Settings → Users. If the setting is off, opening the address directly shows "Rostering is not enabled for this company." and returns to the dashboard.



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**. The date range is required. Leave **Employee** empty for everyone, or open ▼, tick several employees and click **Pick**. **ALL** at the top of the list means everyone.

3. Click **View**. The roster is shown in the table at the bottom of the screen, 15 rows per page, with page buttons and **Show** 15–200. There is no PDF.
4. Click **CSV** instead to download the roster as a file. Although the button says CSV, it downloads an Excel file (.xlsx): one row per employee and one column per date (for example SATURDAY 08/01). Days in a row with the same shift are merged into one cell. Colours: Rest Day grey, Duty green, On Leave pink (legend on the right).
5. Click **Close** to leave the screen.

Note: For the Excel file, pick **ALL** or between 1 and 24 employees. With Employee empty, or with 25 or more employees picked one by one, the download fails; pick **ALL** instead. The end date must not be before the start date. The file is named RosterReport\_<start>\_<end>.xlsx.

#### COLUMNS ON THIS SCREEN

Name    one column per date of the range (for example SAT 08/01)

The table on the screen has the same layout as the Excel file: one column for every date of the range you chose, so a range longer than a week shows every day.

#### FILTERS

Employee    Enter a date range

#### BUTTONS

View    CSV    Close

#### WHAT YOU SHOULD SEE

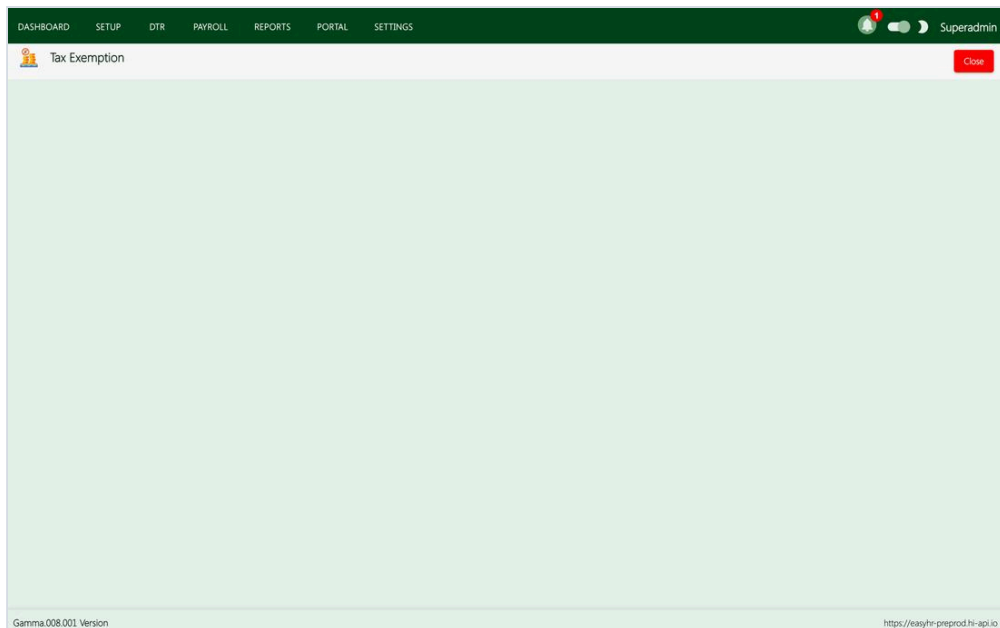
Each cell shows the shift time, such as "09:00 AM - 06:00 PM", or "Rest Day", or "On Leave". The shift is the employee's default shift, replaced by approved change shifts (including published rosters). Only approved leave is shown. For a night shift, the end time is on the next day. Only locked change-shift documents are used, and deleted or resigned employees are not listed. A user who belongs to one company sees only the employees of that company, in name order.

## 8.8 Tax Exemption

The tax exemption codes and the amounts attached to them. They are not used to compute withholding tax (the TRAIN law tax table is used). They are used only as the choices in the **Tax Exemption** drop-down on the employee's Payroll tab and for display on the Withholding Tax Monthly report.

#### 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. Open the address `/software/tax-exemption-list` directly. It cannot be opened from the employee screen. The user needs the **Tax Exemption** right (SETTINGS → User).
2. Click **Add** to create a new code. A code named "NA" is created and its record opens.
3. Enter the details and click **Save**, then **Close**. The code cannot be empty or the same as another code, and the amounts cannot be negative. In the table, **Type** must be MONTHLY, SEMI MONTHLY or YEARLY.

## BUTTONS

Add Close

## THE RECORD ITSELF

Tax Exemption Code Exemption Amount Dependent Amount

Buttons: **Save**, **Close**. The **Tax Exemption Table** tab holds lines with **Type** (MONTHLY / SEMI MONTHLY / YEARLY), **Amount**, **Tax** and **Percentage**, with **Add**, **Edit** and **Delete**.

## WHAT YOU SHOULD SEE

The list of exemption codes. Every system holds the same eight codes (S, ME/S, ME1/S1 to ME5/S5, Z) with 21 table lines.

## WORTH KNOWING

A code that is used by an employee cannot be deleted; the message says how many employees use it. The last remaining code cannot be deleted. The codes are shared by all companies in the same system, so a change made by one company applies to all.

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

There is no separate screen that lists past DTR imports. To check that an import worked, see the Import step in 3.5 DTR.

## 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.

Note: Rostering is available once your company's system has the October 2026 update. Ask Humedit PH if the tick box does nothing.

### 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 click **Unlock**. The company is normally locked, and the tick box stays grey until you unlock it. On the Settings tab, tick **Is Show Rostering Feature**.
3. Click **Save**, then **Lock**.
4. Open **SETUP → Users**, click **Edit** on the user and click **Unlock**. On the **User Rights** tab click **Add**, choose **Rostering Report**, tick the rights, click **Save**, then **Lock** the user. Do this for each person who plans rosters.

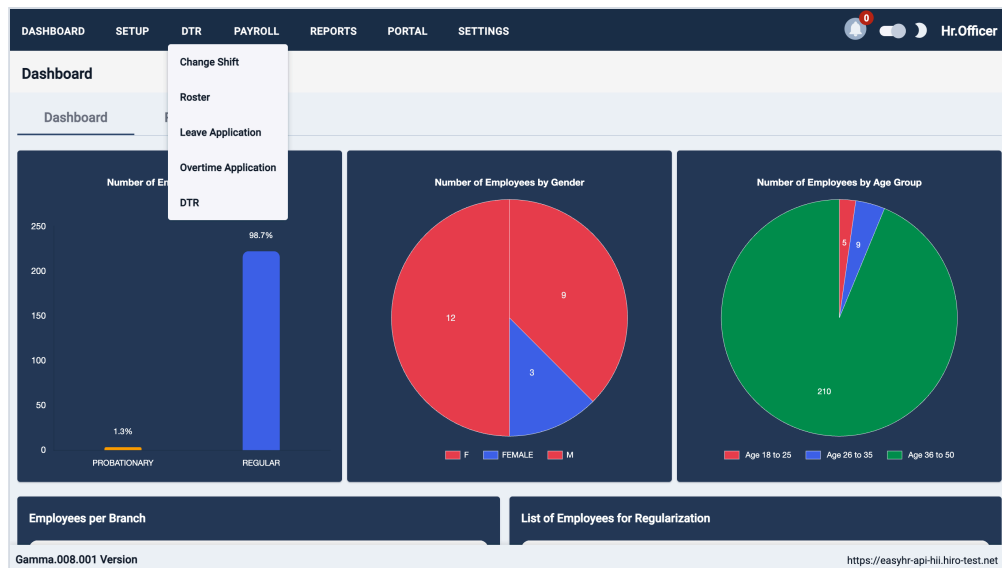
While the user is locked, **Add** is grey. Only superadmin can add this module; anyone else sees "You do not have permission to add this module."

| 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.                                                             |

The dialog also shows Unlock, Print and View; they have no effect on rostering.

## WHAT YOU SHOULD SEE

**DTR → Roster** appears on the menu for users with the right. A change to the company setting applies the next time a page opens; a change to a user's rights applies after that user signs in again. With the tick box cleared, the Roster menu entry, the dashboard Rostering tab and the Rostering Report are hidden. Opening a rostering page directly shows "Rostering is not enabled for this company." and returns to the dashboard.



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.

**Roster Settings** Close

Rotation Patterns Minimum Headcount Rules

A pattern repeats day by day, e.g. Day, Day, Night, Night, Day off, Day off. "Fill from Pattern" on a roster uses it.

2-shift 12h: 2 Day 2 Night 2 Off  
 1. DAY 7AM-7PM 2. DAY 7AM-7PM 3. NIGHT 7PM-7AM 4. NIGHT 7PM-7AM 5. Day off 6. Day off Edit Delete

2-shift 16h night: Day, Day, Night, Off, Off  
 1. DAY 7AM-7PM 2. DAY 7AM-7PM 3. NIGHT 4:30PM-9AM 4. Day off 5. Day off Edit Delete

3-shift: 2 Day 2 Evening 2 Night 2 Off  
 8-day rotation  
 1. DAY 6AM-2PM 2. DAY 6AM-2PM 3. EVENING 2PM-10PM 4. EVENING 2PM-10PM 5. NIGHT 10PM-6AM 6. NIGHT 10PM-6AM 7. Day off 8. Day off Edit Delete

Add Pattern

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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.

**Roster Settings** Close

Rotation Patterns Minimum Headcount Rules

Minimum people per shift. Leave Position, Department, Branch or Day empty to mean any. Days below the minimum show as shortages on the roster.

| Shift          | Position | Department | Branch | Day       | Minimum |                   |                     |
|----------------|----------|------------|--------|-----------|---------|-------------------|---------------------|
| NIGHT 10PM-6AM | Any      | Any        | Any    | Every day | 30      | <span>Edit</span> | <span>Delete</span> |
| DAY 6AM-2PM    | Any      | Any        | Any    | Every day | 40      | <span>Edit</span> | <span>Delete</span> |

Add Minimum Headcount

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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.

**Roster Settings** Close

Rotation Patterns Minimum Headcount **Rules**

Breaking a rule shows a warning on the roster. Publishing still works if a reason is written.

Shift used for days off when publishing  
DAY OFF  
Choose a shift whose every day is a rest day.

Maximum working days in a row  
6

Minimum rest hours between shifts  
11

Maximum night shifts in a row  
3

☒ A day off after night shifts before going back to day shifts

Save Rules

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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.                         |

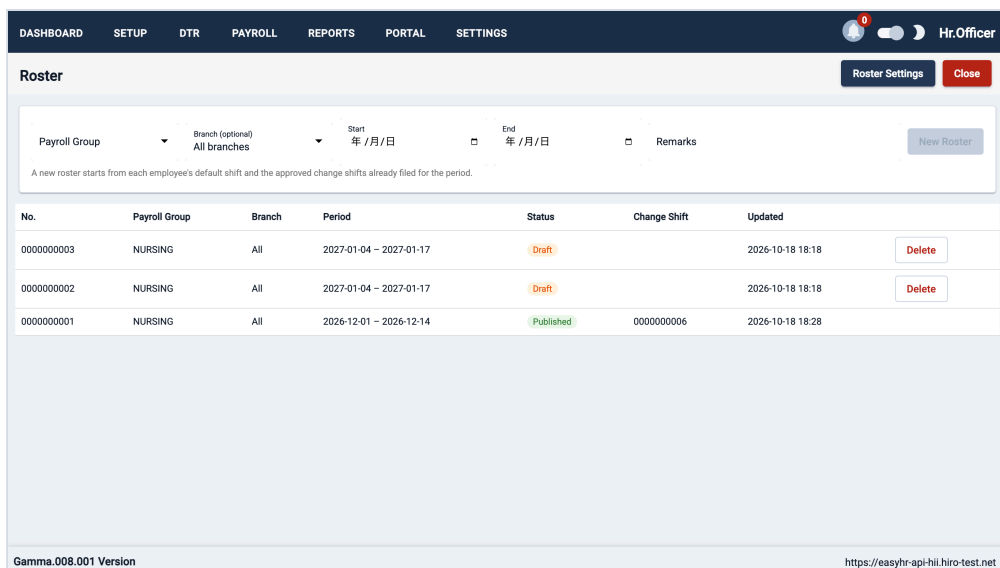
Rules only warn. A roster that breaks them can still be published when a reason is written.

## 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 63 days, start and end included; 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. It lists the employees of the payroll group who were hired on or before the end date and did not resign before the start date. There can be only one roster for the same payroll group and dates: if one already exists, the message "A roster ... already exists for this payroll group and these dates. Open it, or delete the draft first." is shown, and if the group has no employees for the period the message is "No employees found for this payroll group, branch and 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. To undo a change, paint the cell again with its original shift.

3. Click **Save**. The times and warnings are worked out again.

| In a cell            | Meaning                                                                                                                           |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| Shift name and times | The shift for that day; <b>+1</b> 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. Only the first reason is shown; see the warnings under the grid for all of them. |
| Shortages row        | Red count under a date: minimum headcounts not met that day.                                                                      |

DASHBOARD
SETUP
DTR
PAYROLL
REPORTS
PORTAL
SETTINGS
Hr.Officer

Roster 0000000003
Draft
Save
Fill from Pattern
Publish
Close

NURSING 2027-01-04 ~ 2027-01-17
Paint:
8:30AM - 5:30PM
HALFDAY RESTDAY DUTY
RESTDAY DUTY SAT-SUN (8:30AM - 5:30PM)
Rest Day Duty- Open Hour 8:30-10:00
HOSPITAL ROTATING (DEMO)
NIGHT DUTY (DEMO)
DAY OFF
DAY 6AM-2PM
EVENING 2PM-10PM
DAY 7AM-7PM
NIGHT 7PM-7AM
NIGHT 4:30PM-9AM
NIGHT 10PM-6AM
Day off

| 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.<br>Staff Nurse - Ward | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    |
| Nurse, Demo002 X.<br>Staff Nurse - Ward | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    |
| Nurse, Demo003 X.<br>Staff Nurse - Ward | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     |
| Nurse, Demo004 X.<br>Staff Nurse - Ward | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     |
| Nurse, Demo101 X.<br>Staff Nurse - Ward | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 |
| Nurse, Demo102 X.<br>Staff Nurse - Ward | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    |
| Nurse, Demo103 X.<br>Staff Nurse - Ward | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    |
| Nurse, Demo104 X.<br>Staff Nurse - Ward | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     |
| Nurse, Demo105 X.<br>Staff Nurse - Ward | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     |
| Nurse, Demo106 X.<br>Staff Nurse - Ward | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 | Off                    | Off                    | DAY<br>07:00-19:00     | DAY<br>07:00-19:00     | NIGHT<br>16:30-09:00+1 |

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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

DASHBOARD
SETUP
DTR
PAYROLL
REPORTS
PORTAL
SETTINGS
Hr.Officer

Roster 0000000001
Published
Save
Fill from Pattern
Publish
Close

NURSING 2026-12-01 ~ 2026-12-14 Change shift 0000000006 (published 2026-10-18 18:28)
Paint:
HALFDAY RESTDAY DUTY
RESTDAY DUTY SAT-SUN (8:30AM - 5:30PM)
Rest Day Duty- Open Hour 8:30-10:00
HOSPITAL ROTATING (DEMO)
NIGHT DUTY (DEMO)
DAY OFF
DAY 6AM-2PM
EVENING 2PM-10PM
DAY 7AM-7PM
NIGHT 7PM-7AM
NIGHT 4:30PM-9AM
NIGHT 10PM-6AM
Day off

Pattern
2-shift 12h: 2 Day 2 Nigh...
Start each employee at a different step
Overwrite existing cells
Fill 204 employees
Cancel

☒ Nurse, Demo001 X.
☒ Nurse, Demo002 X.
☒ Nurse, Demo003 X.
☒ Nurse, Demo004 X.
☒ Nurse, Demo101 X.
☒ Nurse, Demo102 X.
☒ Nurse, Demo103 X.
☒ Nurse, Demo104 X.
☒ Nurse, Demo105 X.
☒ Nurse, Demo106 X.
☒ Nurse, Demo107 X.
☒ Nurse, Demo108 X.
☒ Nurse, Demo109 X.
☒ Nurse, Demo110 X.
☒ Nurse, Demo111 X.
☒ Nurse, Demo112 X.
☒ Nurse, Demo113 X.
☒ Nurse, Demo114 X.
☒ Nurse, Demo115 X.
☒ Nurse, Demo116 X.
☒ Nurse, Demo117 X.
☒ Nurse, Demo118 X.
☒ Nurse, Demo119 X.
☒ Nurse, Demo120 X.
☒ Nurse, Demo121 X.
☒ Nurse, Demo122 X.
☒ Nurse, Demo123 X.
☒ Nurse, Demo124 X.
☒ Nurse, Demo125 X.
☒ Nurse, Demo126 X.
☒ Nurse, Demo127 X.
☒ Nurse, Demo128 X.
☒ Nurse, Demo129 X.
☒ Nurse, Demo130 X.
☒ Nurse, Demo131 X.
☒ Nurse, Demo132 X.
☒ Nurse, Demo133 X.
☒ Nurse, Demo134 X.
☒ Nurse, Demo135 X.
☒ Nurse, Demo136 X.
☒ Nurse, Demo137 X.
☒ Nurse, Demo138 X.
☒ Nurse, Demo139 X.
☒ Nurse, Demo140 X.
☒ Nurse, Demo141 X.
☒ Nurse, Demo142 X.
☒ Nurse, Demo143 X.
☒ Nurse, Demo144 X.

| Employee                                | 12/01 TUE              | 12/02 WED              | 12/03 THU              | 12/04 FRI              | 12/05 SAT              | 12/06 SUN              | 12/07 MON              | 12/08 TUE              | 12/09 WED              | 12/10 THU              | 12/11 FRI              | 12/12 SAT              | 12/13 SUN              | 12/14 MON              |
|-----------------------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|
| Nurse, Demo001 X.<br>Staff Nurse - Ward | DAY<br>06:00-14:00     | DAY<br>06:00-14:00     | EVENING<br>14:00-22:00 | EVENING<br>14:00-22:00 | NIGHT<br>22:00-06:00+1 | NIGHT<br>22:00-06:00+1 | Off                    | Off                    | DAY<br>06:00-14:00     | DAY<br>06:00-14:00     | EVENING<br>14:00-22:00 | EVENING<br>14:00-22:00 | NIGHT<br>22:00-06:00+1 | NIGHT<br>22:00-06:00+1 |
| Nurse, Demo002 X.<br>Staff Nurse - Ward | DAY<br>06:00-14:00     | EVENING<br>14:00-22:00 | EVENING<br>14:00-22:00 | NIGHT<br>22:00-06:00+1 | NIGHT<br>22:00-06:00+1 | DAY<br>06:00-14:00     | Off                    | DAY<br>06:00-14:00     | DAY<br>06:00-14:00     | EVENING<br>14:00-22:00 | EVENING<br>14:00-22:00 | NIGHT<br>22:00-06:00+1 | NIGHT<br>22:00-06:00+1 | Off                    |
| Nurse, Demo003 X.<br>Staff Nurse - Ward | EVENING<br>14:00-22:00 | EVENING<br>14:00-22:00 | NIGHT<br>22:00-06:00+1 | NIGHT<br>22:00-06:00+1 | Off                    | Off                    | DAY<br>06:00-14:00     | DAY<br>06:00-14:00     | EVENING<br>14:00-22:00 | EVENING<br>14:00-22:00 | NIGHT<br>22:00-06:00+1 | NIGHT<br>22:00-06:00+1 | Off                    | Off                    |
| Nurse, Demo004 X.<br>Staff Nurse - Ward | EVENING<br>14:00-22:00 | NIGHT<br>22:00-06:00+1 | NIGHT<br>22:00-06:00+1 | Off                    | Off                    | DAY<br>06:00-14:00     | DAY<br>06:00-14:00     | EVENING<br>14:00-22:00 | EVENING<br>14:00-22:00 | NIGHT<br>22:00-06:00+1 | NIGHT<br>22:00-06:00+1 | Off                    | Off                    | DAY<br>06:00-14:00     |
| Nurse, Demo101 X.<br>Staff Nurse - Ward | NIGHT<br>22:00-06:00+1 | NIGHT<br>22:00-06:00+1 | DAY<br>06:00-14:00     | DAY<br>06:00-14:00     | EVENING<br>14:00-22:00 | EVENING<br>14:00-22:00 | NIGHT<br>22:00-06:00+1 | NIGHT<br>22:00-06:00+1 | DAY<br>06:00-14:00     | DAY<br>06:00-14:00     | EVENING<br>14:00-22:00 | EVENING<br>14:00-22:00 | NIGHT<br>22:00-06:00+1 | NIGHT<br>22:00-06:00+1 |

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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 cells that already hold a shift you painted or filled earlier; clear it to fill only the cells that are still on the employee's default shift.
4. Untick employees who should not be filled, then click **Fill**. Adjust single cells afterwards by painting.

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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.                                                                           |
| OVERLAP          | A shift starts before the previous shift has ended (the message says by how many hours).                                                        |
| ON_LEAVE         | A shift on a day of approved leave.                                                                                                             |
| SHORTAGE         | A shift on a date has fewer people than its minimum headcount. People whose cell is on a day that is a rest day for that shift are not counted. |

Publish — a reason is required while there are warnings

## PUBLISHING TO THE DTR

1. Save any changes, then click **Publish**. If the roster has days off, set **Shift used for days off when publishing** on the Rules tab of Roster Settings (9.2) first.
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. A DTR uses only one Change Shift document.
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.

For a roster made for one branch, the unlocked DTRs are not changed, because pointing the whole payroll group's DTR at a branch roster would drop everyone else's shifts. After publishing, the screen says so and gives the Change Shift number; select that Change Shift document on the DTR yourself. A roster with no employees cannot be published ("There are no employees on this roster. Nothing to publish.").

## 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. **Bring in** also sets cells you painted back to what the application says.

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. The roster's document on the Change Shift screen (3.2) cannot be unlocked, edited or deleted there; the message "This change shift belongs to a roster. Edit the roster and publish it again." is shown. Always change it from the roster.

## 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 **Is Show Rostering Feature** is ticked in Company Detail (superadmin, 9.1) and the user has the **Rostering Report** user right.

Opening the report or the table on the screen needs the **Rostering Report** right. They now show the shift each person actually works: the approved lines of locked change-shift documents, including published rosters, over the default shift. When two documents cover the same day, the newer one is used.

Night shifts end on the next day instead of the same day. They are shown without a date, for example "10:00 PM - 06:00 AM", and the end time is the following morning. In the Excel file, cells for days in a row with the same shift are merged.

A day is shown as On Leave only when the leave line is ticked **Approved** on the Leave Application. Leave filed in the portal appears after the last approver has approved it.

### CHANGE SHIFT (3.2)

The DTR uses the lines of the change-shift document selected on the DTR. When there are two or three approvers, a portal application becomes Approved only at the last approval; denied ones never change the DTR. After approving, compute the DTR again. If a roster has been published for the period, use **Bring in** on the roster and publish again (9.3).

Note: Only the lines ticked **Approved** should change the DTR. On a system that has the latest rostering update the DTR ignores lines that are not approved; on other systems, lines that are not approved (for example an application that was only filed or was denied) are used by the DTR as well. Before you compute the DTR, check the Change Shift document and delete or correct such lines.

On the Add screen of Change Shift, **Approved** is ticked by default. Clear the tick for a line that must not apply (see the Note above). The **Import** file has no Approved column; every imported line is approved.