

Overview Video

https://www.youtube.com/embed/cOnTt_wbtzg

Step-by-Step Tutorial Guide

Overview

This tutorial explains how to use and manage the Employee Management module in TankhaPay. The walkthrough covers:

- Accessing the Employee Management module
- Adding and managing employee records
- Updating employee information
- Managing employee documents
- Configuring employee profiles
- Tracking employee status
- Managing employee lifecycle activities

Step 1: Open the Employee Management Module

1. Log in to the TankhaPay dashboard.
2. From the left-side navigation panel, locate **Employee Management**.
3. Click on **Employee Management** to open the module.
4. The dashboard displays employee records and management options.

This section helps organizations centrally manage employee information and workforce records.

Step 2: View Employee Directory

1. On the dashboard, review the employee list.
2. The employee directory may display:
 - Employee Name
 - Employee ID
 - Department
 - Designation
 - Contact Information
 - Employment Status
3. Use search and filters to locate specific employees.

This helps HR teams quickly access employee information.

Step 3: Add a New Employee

1. Click on **Add Employee** or **Create Employee**.
2. Enter employee details in the required fields.
3. Information may include:
 - Full Name
 - Employee ID
 - Email Address
 - Mobile Number
 - Department
 - Designation
 - Joining Date
 - Reporting Manager
4. Save the employee profile.

This step creates a new employee record within the system.

Step 4: Configure Employee Profile Information

1. Open the employee profile section.
2. Add or update additional employee information.
3. Details may include:
 - Personal Information
 - Address Details
 - Emergency Contact
 - Bank Information
 - Tax Information
 - Identification Details
4. Save all updates.

Maintaining complete employee profiles helps improve HR operations and compliance.

Step 5: Upload Employee Documents

1. Navigate to the document management section.
2. Upload employee-related documents.
3. Documents may include:
 - Aadhaar Card
 - PAN Card
 - Offer Letter
 - Educational Certificates
 - Bank Documents
 - Identity Proof
4. Save uploaded files.

Document management helps maintain centralized employee records.

Step 6: Assign Departments and Roles

1. Open the employment or organization details section.
2. Assign:
 - Department
 - Designation
 - Reporting Manager
 - Work Location
 - Employee Role
3. Save the configuration.

This helps maintain organizational hierarchy and role clarity.

Step 7: Manage Employee Status

1. Review employee employment status.
2. Status categories may include:
 - Active
 - Inactive
 - On Probation
 - Resigned
 - Terminated
3. Update status when required.

Employee status tracking helps organizations manage workforce records effectively.

Step 8: Edit Existing Employee Records

1. Search for the employee profile.
2. Click on the edit option.
3. Update required information.
4. Save the updated details.

This ensures employee data remains accurate and updated.

Step 9: View Employee History and Records

1. Open the employee activity or history section.
2. Review:
 - Employment Timeline
 - Department Transfers
 - Role Changes
 - Attendance History
 - Leave Records
3. Access historical employee information when required.

Historical tracking helps maintain proper HR records and audits.

Step 10: Generate Employee Reports

1. Navigate to the employee reports section.
2. Select the required report type.
3. Apply filters such as:
 - Department
 - Designation
 - Employee Status
 - Date Range
4. Generate and export the report.

Employee reports help HR teams analyze workforce data efficiently.

Step 11: Manage Employee Lifecycle Activities

1. Review employee lifecycle management options.
2. Activities may include:
 - Employee Onboarding
 - Confirmation Process
 - Transfers
 - Promotions
 - Exit Management
3. Complete required employee lifecycle actions.

This helps organizations manage employees throughout their employment journey.

Key Benefits of the Employee Management Module

- Centralized employee database
- Easy employee onboarding and updates
- Secure document management
- Better workforce visibility
- Structured role and department management
- Employee lifecycle tracking
- Improved HR operational efficiency

End of Tutorial

You have now completed the walkthrough of the TankhaPay Employee Management module.

The Employee Management module helps organizations efficiently manage employee records, profiles, documents, reporting structures, and workforce lifecycle activities through a centralized

HR management system.

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