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# HR & Payroll System

## How the System Actually Works

This is a walkthrough of the HR & Payroll system as it functions in practice, prepared by Basira. It follows the day-to-day sequence: an employee checking in, their record being maintained, attendance being tracked, and payroll being run at the end of the period.

|                    |                                                              |
|--------------------|--------------------------------------------------------------|
| <b>Subject</b>     | HR & Payroll Platform                                        |
| <b>Scope</b>       | Employee record, check-in, attendance, payroll, salary slips |
| <b>Prepared by</b> | Basira                                                       |

## INTRODUCTION

# What This System Is

This is an open-source Human Resources and Payroll platform covering the employee journey in one connected system. It is used across IT, manufacturing, healthcare, education and consulting, and can integrate with a wider accounting suite if needed.

It has no per-employee licensing fee since it's open-source; the ongoing cost is hosting plus the setup work needed to configure it for a specific organization's roles, policies, and salary rules. The sections below cover the modules most relevant to daily operations: attendance, employee records, and payroll.

|                                      |                                                                                                |
|--------------------------------------|------------------------------------------------------------------------------------------------|
| <b>Employee Lifecycle</b>            | Onboarding, transfers, promotions, exit interviews — one record per employee, start to finish. |
| <b>Attendance &amp; Shifts</b>       | Check-in/check-out with geolocation, shift assignment, rosters, biometric integration.         |
| <b>Leave Management</b>              | Configurable leave policies, holiday calendars, balances, encashment.                          |
| <b>Payroll &amp; Taxation</b>        | Salary structures, tax slabs, salary slips, batch payroll runs.                                |
| <b>Expense Claims</b>                | Employee expense claims and advances, tied into accounting.                                    |
| <b>Performance &amp; Recruitment</b> | Goals, appraisals, and hiring workflows from job posting to offer.                             |

# From Check-In to Payroll

Each stage below reflects the actual system screens, taken from the official documentation.

## 1

### Employee Check-In

An employee checks in and out through the Employee Checkin form, available via the web portal or mobile app. The Log Type marks it as IN or OUT.

If geolocation tracking is enabled, latitude and longitude are captured automatically, and a Location/Device ID field records where or through what device the check-in happened — useful for confirming on-site presence or linking to a biometric terminal.

The system fetches the employee's active shift automatically and links the check-in to the resulting attendance record once marked.

The screenshot shows the 'Employee Checkin' form for 'Steve Merkel Lews'. The form is titled 'EMP-CKIN-08-2024-000002'. It includes a search bar at the top right with the text 'Search or type a command (⌘ + G)'. Below the search bar, there are buttons for 'Fetch Shift', '<', '>', and 'Save'. The form is divided into several sections: 'Assigned To' (Steve Merkel Lews), 'Attachments', 'Tags', 'Share', 'Log Type' (IN), 'Shift' (General), 'Location' (Latitude: 50.0000000, Longitude: 24.9990000), 'Time' (04-07-2024 16:59:02), 'Location / Device ID' (Mumbai-123), and 'Attendance Marked' (HR-ATT-2024-00171). There is also a checkbox for 'Skip Auto Attendance'.

| Field                | Value               |
|----------------------|---------------------|
| Employee *           | HR-EMP-00003        |
| Time *               | 04-07-2024 16:59:02 |
| Employee Name        | Steve Merkel Lews   |
| Location / Device ID | Mumbai-123          |
| Log Type             | IN                  |
| Shift                | General             |
| Attendance Marked    | HR-ATT-2024-00171   |
| Latitude             | 50.0000000          |
| Longitude            | 24.9990000          |

Employee Checkin form

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## Attendance Record

Each day's attendance is either marked automatically from check-in logs or entered directly, with a status of Present, Absent, On Leave, or Half Day.

The record also flags Late Entry or Early Exit against the assigned shift, and links back to the company and department the employee belongs to.

This is the record that later feeds into payroll calculations for the pay period.

Attendance record

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## Employee Record

Every employee has a single master record covering personal details, joining information, company, department, designation, and reporting manager — organized into tabs (Overview, Joining, Address & Contacts, Attendance & Leaves, Salary, Personal, Profile, Exit).

This record is the anchor for everything else: attendance, leave balances, salary structure, and eventual exit details all reference back to it.

Employee master record

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## Payroll Entry

At the end of a payroll period, a single Payroll Entry is created for a given frequency (e.g. Monthly), optionally filtered by branch, department, or designation.

Clicking Get Employees pulls in every employee matching the criteria; Create Salary Slips then generates a salary slip for each one in a single batch rather than one at a time.

The screenshot shows the 'Payroll Entry' form. The top bar indicates the user is in 'Human Resources' > 'Payroll Entry'. The form title is 'HR-PRUN-2020-00001' with a 'Draft' status. On the left, there are buttons for '+', 'Shared With', and a heart icon. The main form area has sections for 'SELECT EMPLOYEES' (Posting Date, Company, Payroll Frequency), 'EMPLOYEES' (Branch, Designation, Department, Number Of Employees), and 'Employee Details' (a table with 2 employees). The 'Employee Details' table has columns: Employee, Employee Name, Department, Designation, and a dropdown arrow. The data rows are: 1. HR-EMP-00002: Rahul, and 2. HR-EMP-00001: Nabin Baran Hait.

*Payroll Entry*

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## Salary Slip

Each generated salary slip breaks down Earnings (e.g. Basic, House Rent Allowance) against Deductions (e.g. Income Tax, Professional Tax), then computes Gross Pay, Total Deductions, and Net Pay.

It also tracks Year to Date and Month to Date totals per employee, so cumulative pay and tax figures are visible without separate reports.

The screenshot shows the 'Salary Slip' form for 'Rucha Mahabal' in 'Submitted' status. The form is titled 'Sal Slip/HR-EMP-00001/00004'. It has a 'Menu' button and a 'Cancel' button. The form is divided into sections: 'EARNING & DEDUCTION', 'NET PAY INFO', and 'Year To Date / Month To Date'. The 'EARNING & DEDUCTION' section has two tables: 'Earnings' and 'Deductions'. The 'Earnings' table has columns: Component, Amount, and a dropdown arrow. The data rows are: Basic (₹ 30,000.00) and House Rent Allowance (₹ 20,000.00). The 'Deductions' table has columns: Component, Amount, and a dropdown arrow. The data rows are: Income Tax (₹ 1,200.00) and Professional Tax (₹ 200.00). Below these tables are fields for Gross Pay (INR) ₹ 50,000.00, Total Deduction (INR) ₹ 1,400.00, Total Principal Amount ₹ 0.00, Total Loan Repayment ₹ 0.00, and Total Interest Amount ₹ 0.00. The 'NET PAY INFO' section shows Net Pay (INR) ₹ 48,600.00 and Rounded Total (INR) ₹ 48,600.00. The 'Year To Date (INR)' is ₹ 97,200.00, and the 'Month To Date (INR)' is ₹ 48,600.00.

*Salary Slip with Year-to-Date / Month-to-Date*

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### **Leave Application & Approval**

Employees submit leave requests directly in the system, selecting the leave type (e.g. annual, sick, unpaid) and dates. The request routes to their assigned approver automatically.

Once approved, the employee's leave balance updates immediately, and the approved days are reflected in their attendance record for that period — so it's accounted for correctly when payroll runs, without anyone re-entering it by hand.

Balances, entitlements, and holiday calendars are all configurable per employee group or policy, so different teams can follow different leave rules within the same system.

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### **Mobile App Access**

The same core actions are available from a mobile app: checking in and out, applying for leave, viewing approval status, and pulling up past payslips — without needing a desk or a laptop.

This matters most for staff who aren't at a computer during the day (field, retail, site roles), since it keeps attendance and leave data accurate without extra manual entry later.

## Access, Security & Localization

A few practical points worth knowing before rolling this out to a team.



### Role-Based Access

Every user only sees what their role allows: employees see their own record, attendance, and payslips; managers see their team's data for approvals; administrators have full visibility. No one sees company-wide salary data unless specifically granted that access.



### Backups & Data Ownership

Since the system is self-hosted, all employee, attendance, and payroll data lives on infrastructure the organization controls (or a hosting provider it chooses) — not on a third-party SaaS vendor's servers. Regular backups should be part of whatever hosting setup is chosen, the same as any other business system.



### Works With Any Country's Tax Rules

Payroll isn't locked to one country's tax logic. Income tax slabs, statutory deductions, and salary components are all configurable, so the system gets set up to match whichever country's tax and labour rules actually apply to the organization — including places with no personal income tax, where those fields are simply left unused, or regions with specific requirements like end-of-service gratuity or mandatory salary file formats for bank transfers.