USER GUIDE

EMPLOYEE PROFILE (ADMIN)

Administrative

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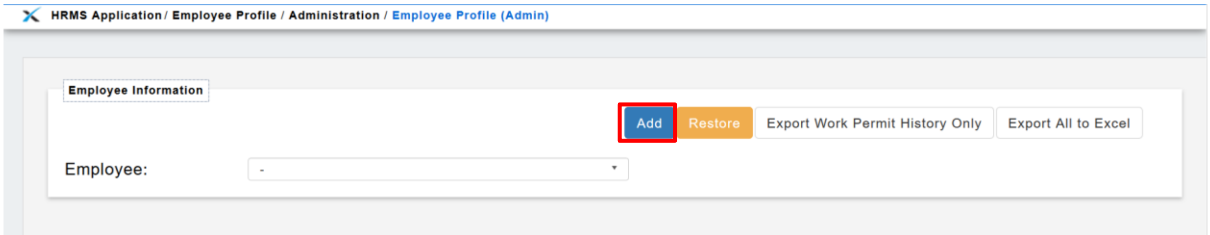
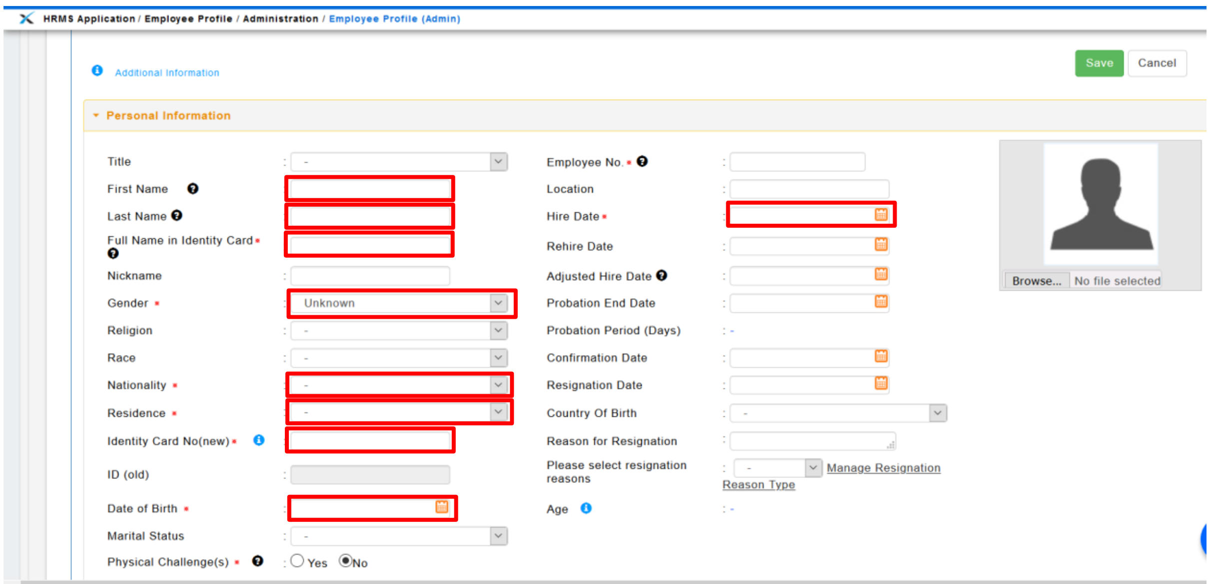
CREATE EMPLOYEE PROFILE

1. Go to Employee Profile -> Administration ->Employee Profile (Admin).
2. Click the 

button as screenshot highlight below.

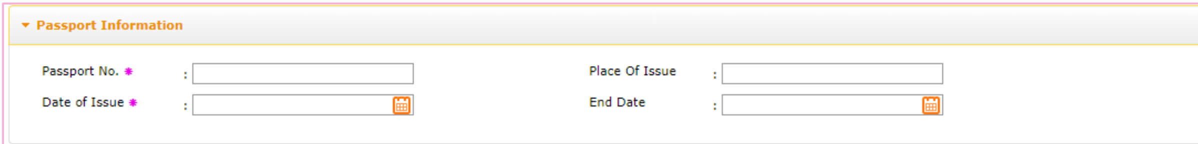


3. Screenshot below for the highlighted fields from the screenshot below are all require to be fill.



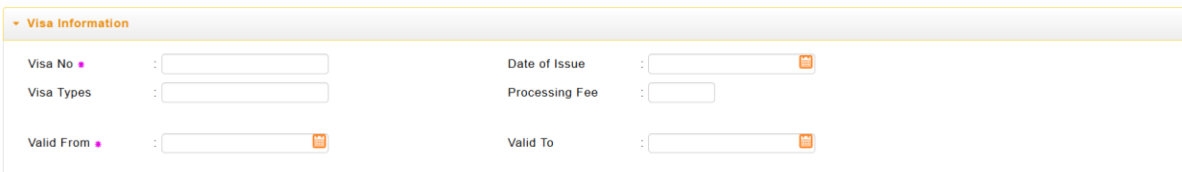
4. After employee detail has been filling up, scroll down for other optional information to fill up. Click on the tab will expand and show you the information for you to fill in.

Optional information **Optional Information:**



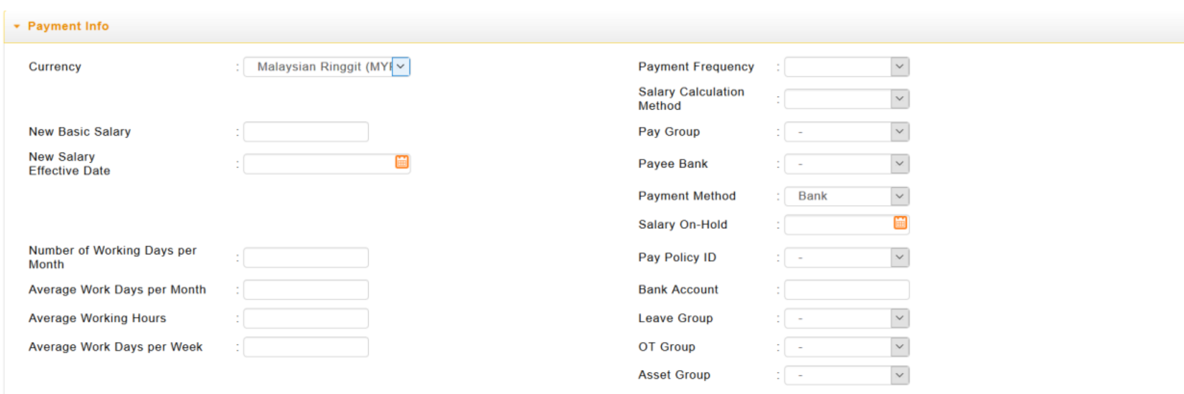
Passport Information

Work Permit Information

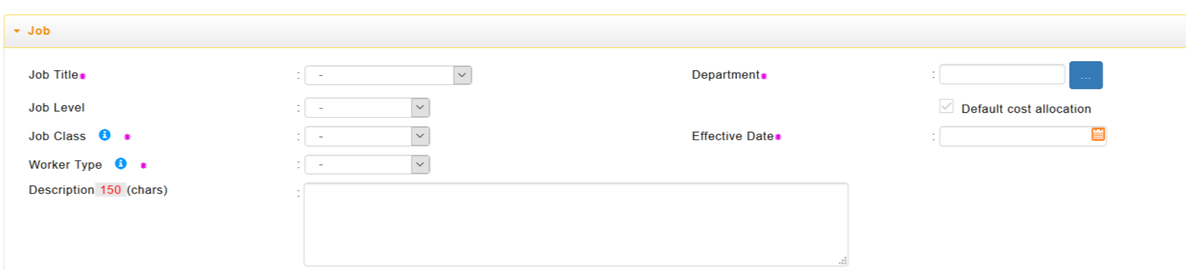


Visa Information

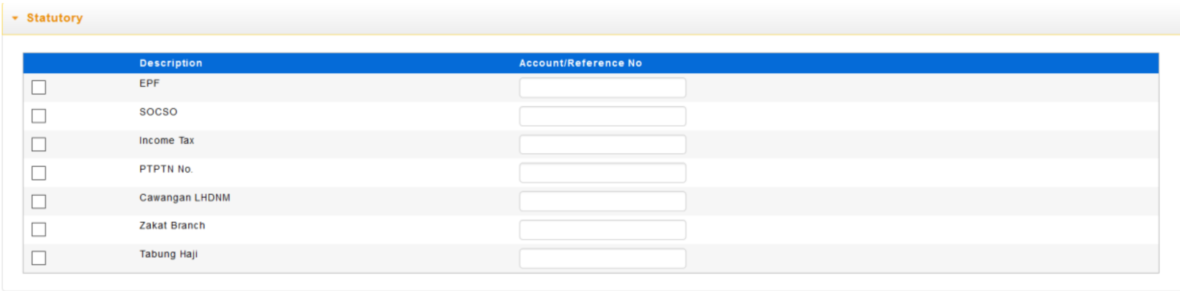
<u>Optional Information but important to be fill:</u>



Payment Info

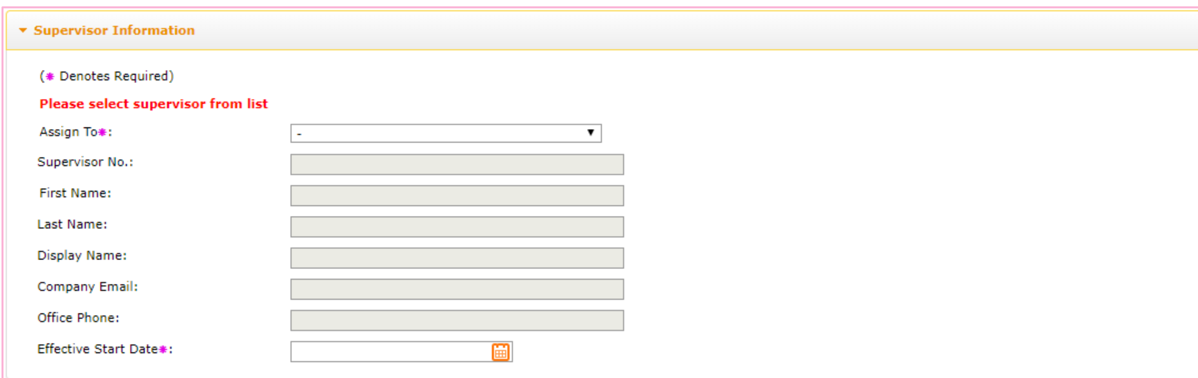


Job



Statutory

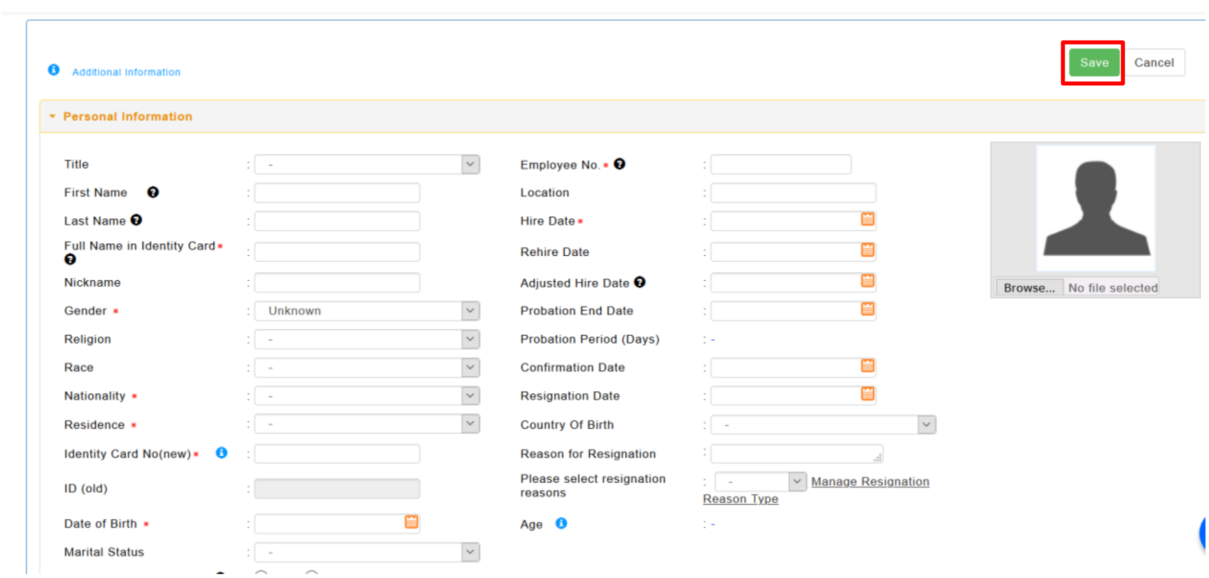
Supervisor Assignment:



Supervisor Information

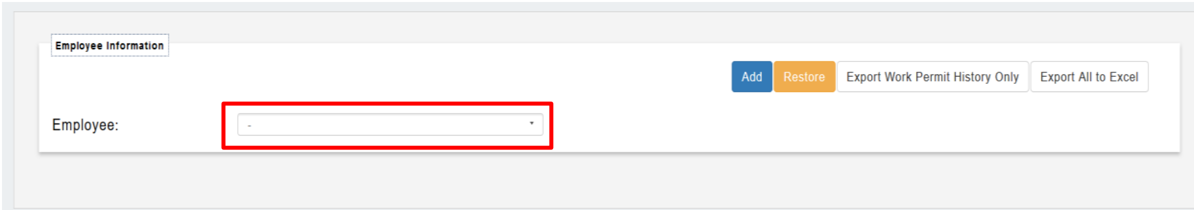
5. Once all the fields are being filled, click 

button.

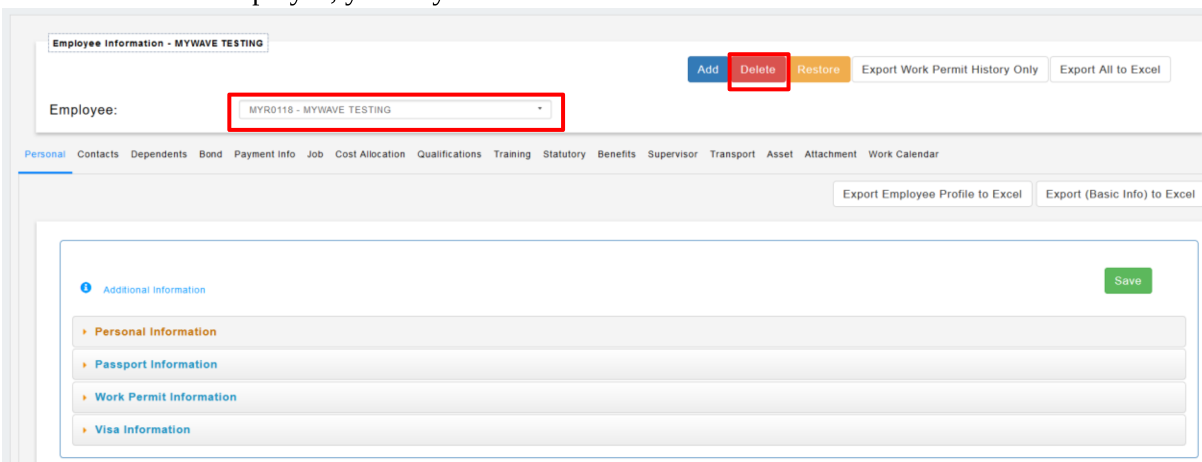


DELETE EMPLOYEE PROFILE

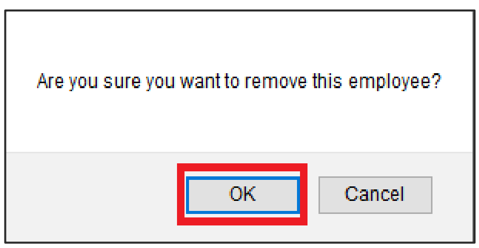
1. Go to Employee Profile -> Employee Profile (Admin).
2. Select the employee that you wish to delete.



3. Once selected the employee, you may click Delete button.



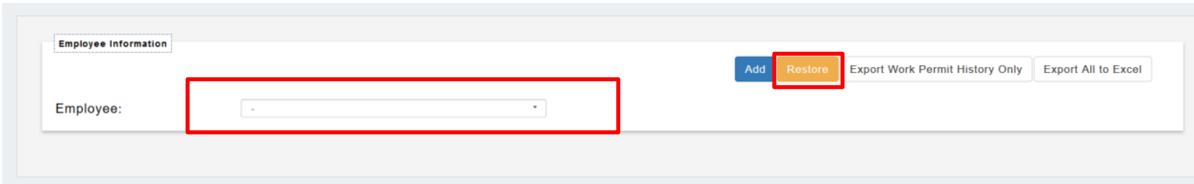
4. Click OK to delete the employee profile.



RESTORE EMPLOYEE PROFILE

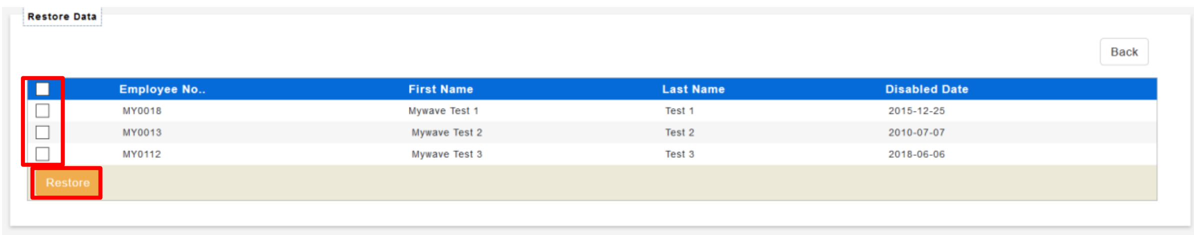
1. Go to Employee Profile -> Employee Profile (Admin).
2. Click on the 

button.



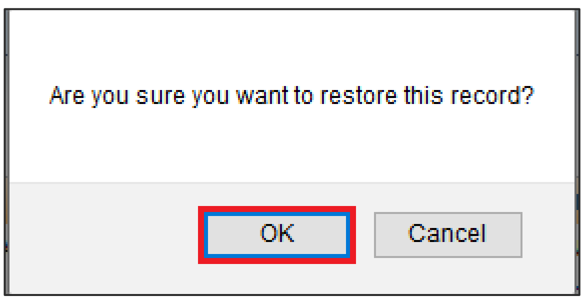
3. Tick for the employee that you wish to restore.
4. Click 

button



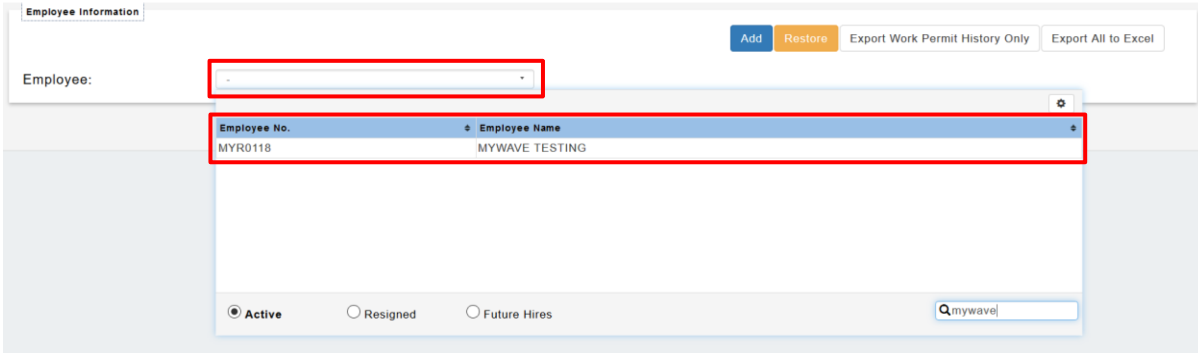
5. Click 

to restore the employee profile.

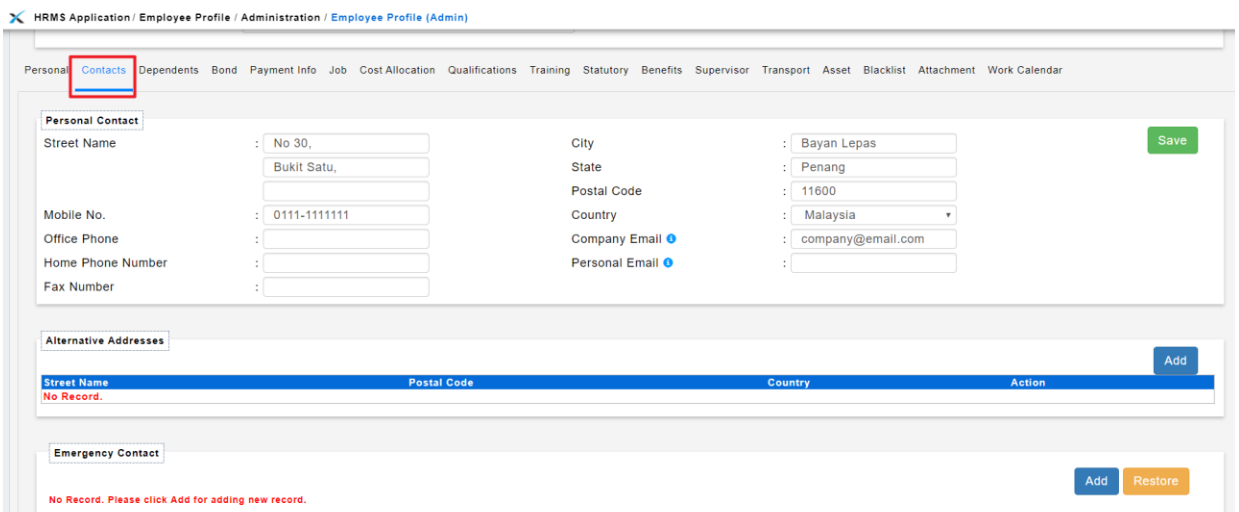


ADD CONTACT DETAILS

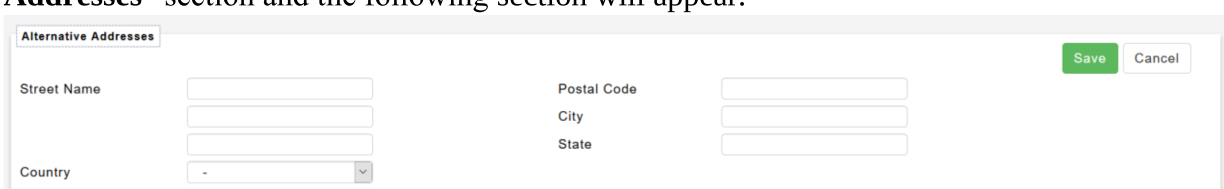
1. Go to Employee Profile → **Employee Profile (Admin)**.
2. Select the employee in the list that you want to add personal contact.



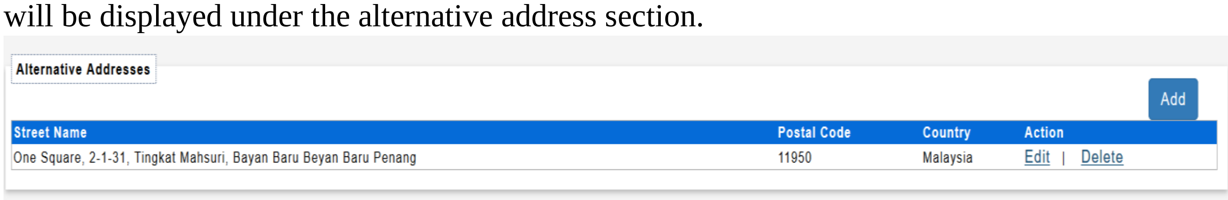
3. Select the tab [**Contacts**].
4. Below is the available information to be stored under employee's personal information section.



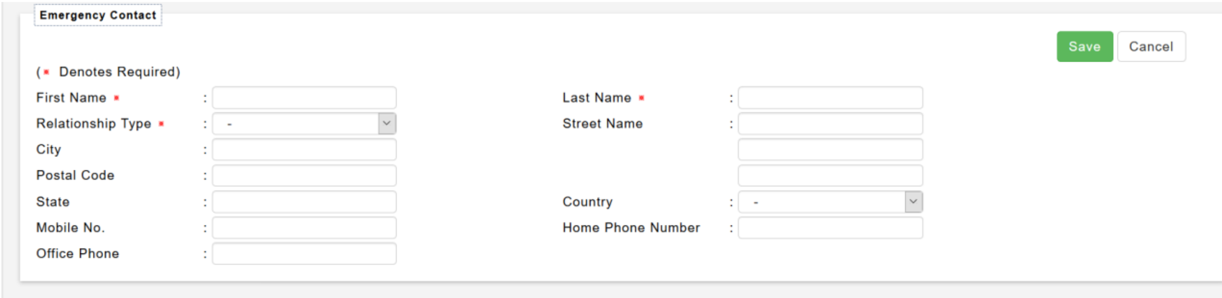
5. To add a new alternative address, click on Add available under the "**Alternative Addresses**" section and the following section will appear.



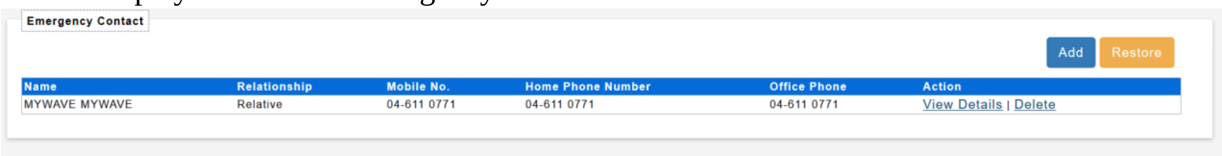
6. After filling the following details, click on Save to save the details. After saving, details will be displayed under the alternative address section.



7. To add emergency contact, head over to “**Emergency Contact**” section and click on Add . Upon doing so, the following form will be presented.

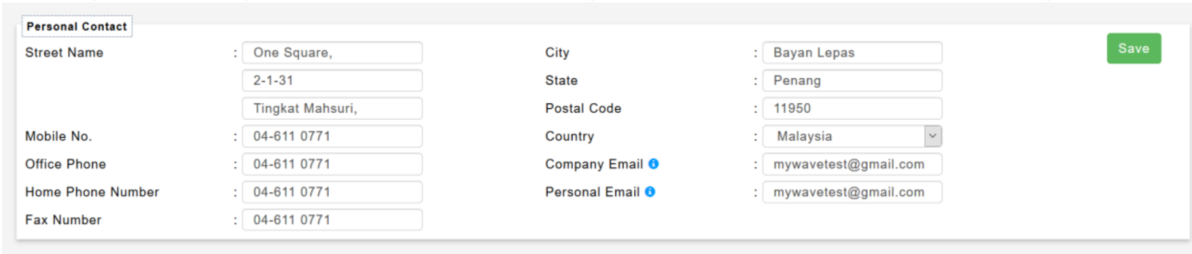


8. After filling the following details, click on Save to save the details. After saving, details will be displayed under the emergency contact section.

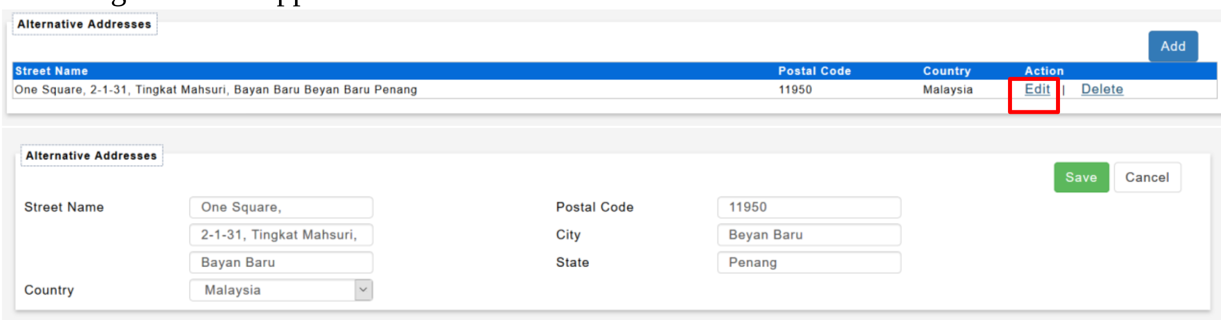


EDIT CONTACT DETAILS

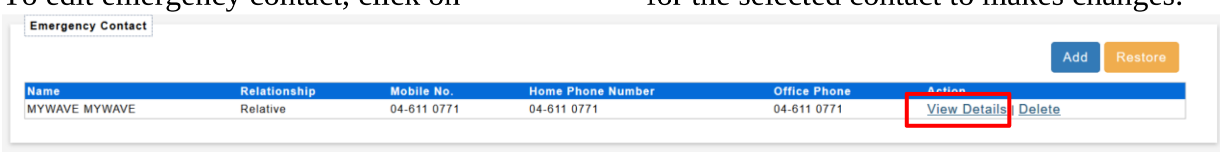
1. To edit personal contact, the form will be available for the admin to edit straight away without needing to click any button. Once done editing, click on Save to save the changes.



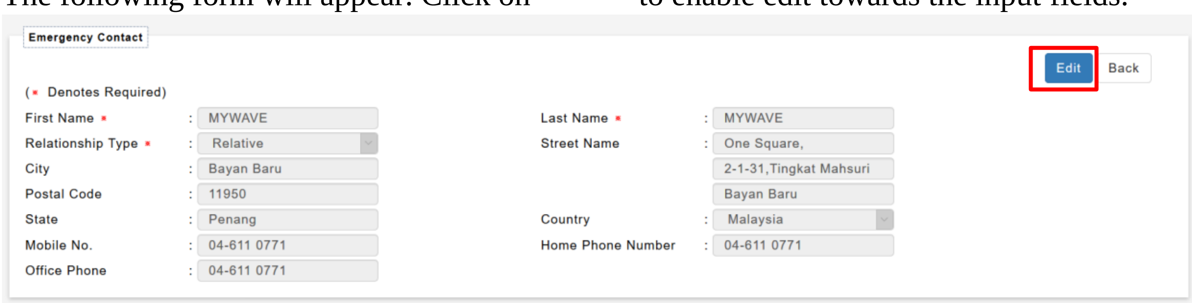
2. To edit alternative address, click on Edit for the selected address to make changes and the following form will appear.



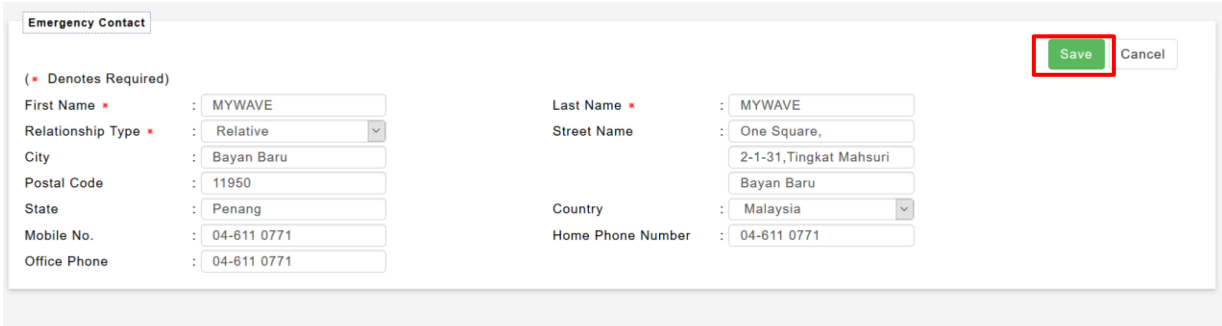
3. To save the changes click on Save.
4. To edit emergency contact, click on View Details | for the selected contact to makes changes.



5. The following form will appear. Click on Edit to enable edit towards the input fields.

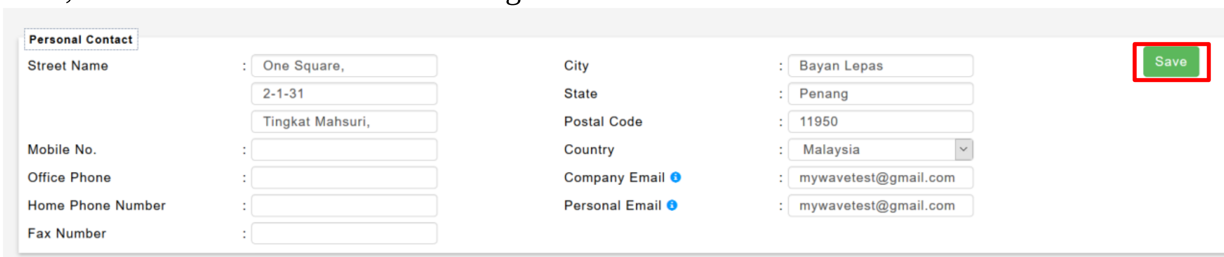


6. Once done, click on Save to save changes.

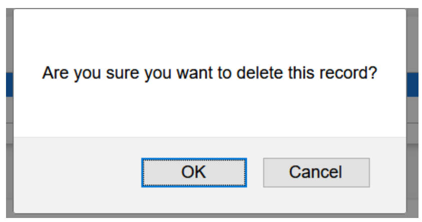


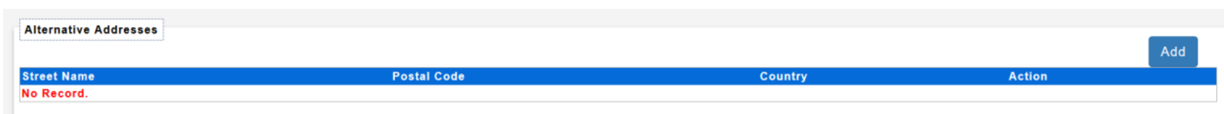
DELETE CONTACT DETAILS

1. To remove personal contact, the form will be available for the admin to make changes straight away without needing to click any button. Just remove any unneeded data in the form. Once done, click on Save to save the changes.

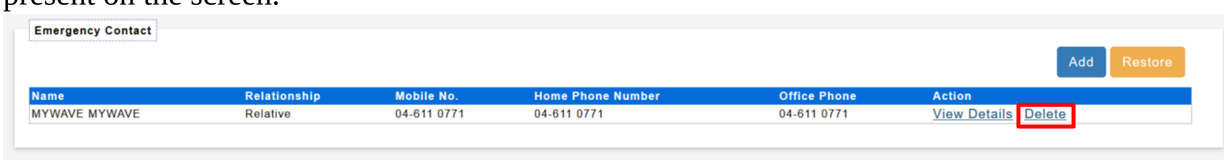


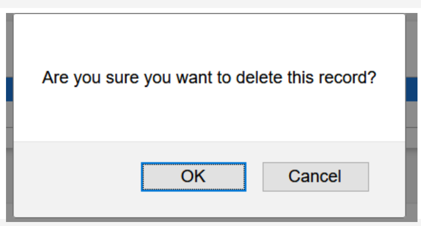
2. To delete alternative address, click on Delete for the selected address to delete and a confirmation message will appear. Upon confirming deletion, the address will no longer be present on the screen.

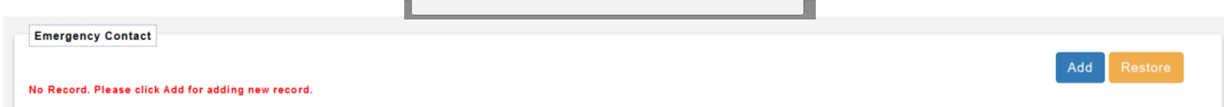




3. To delete emergency contact, click on Delete for the selected contact to delete and a confirmation message will appear. Upon confirming deletion, the address will no longer be present on the screen.

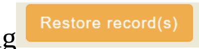




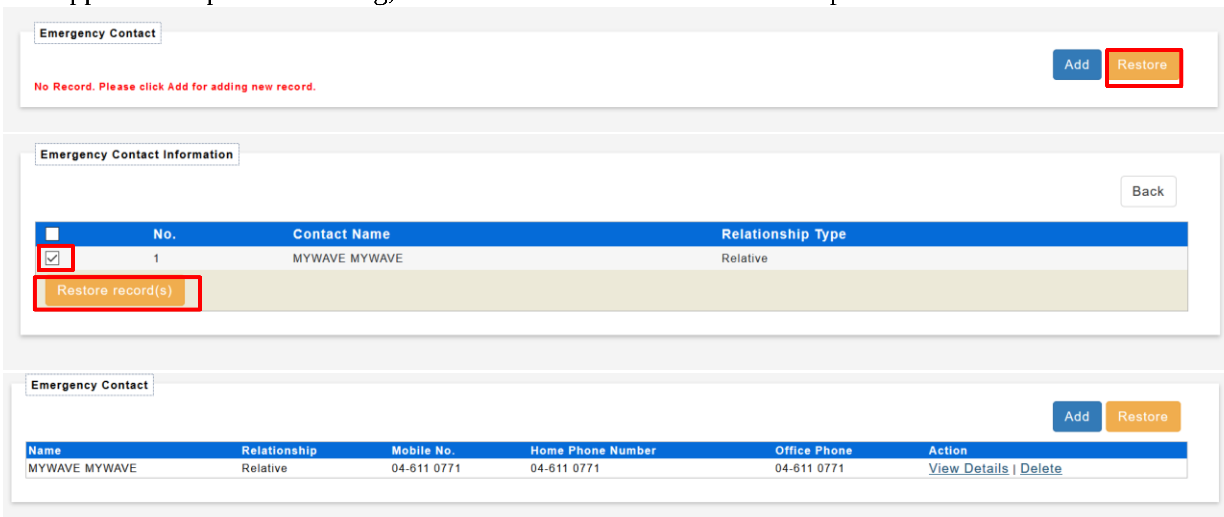


RESTORE EMERGENCY CONTACT

1. To restore emergency contact, click on 

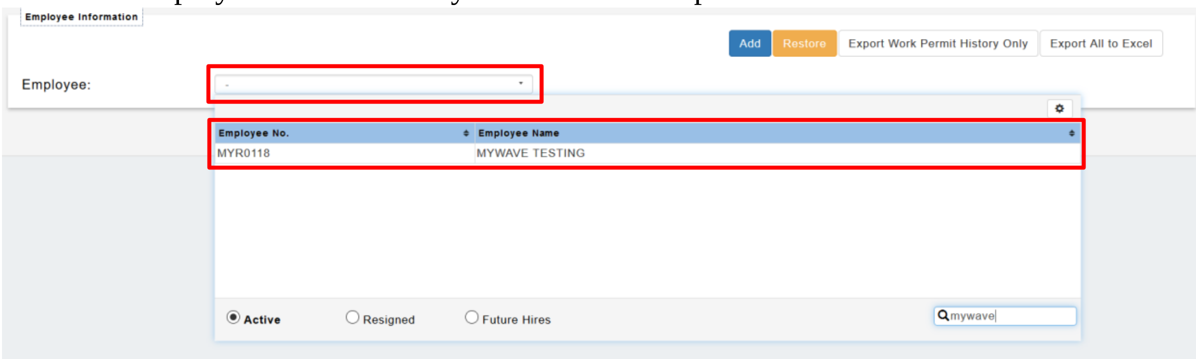
and a list of deleted emergency contact will appear. Select the contact to restore and proceed by clicking 

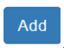
. A confirmation message will appear and upon confirming, the selected restored contact will be present in contact list.



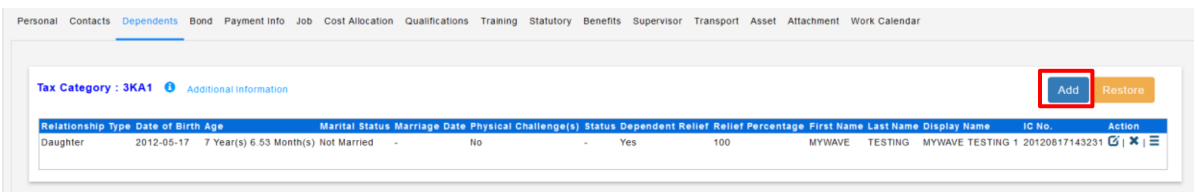
ADD DEPENDENTS

1. Go to Employee Profile → Employee Profile (Admin)
2. Select the employee in the list that you want to add dependents.

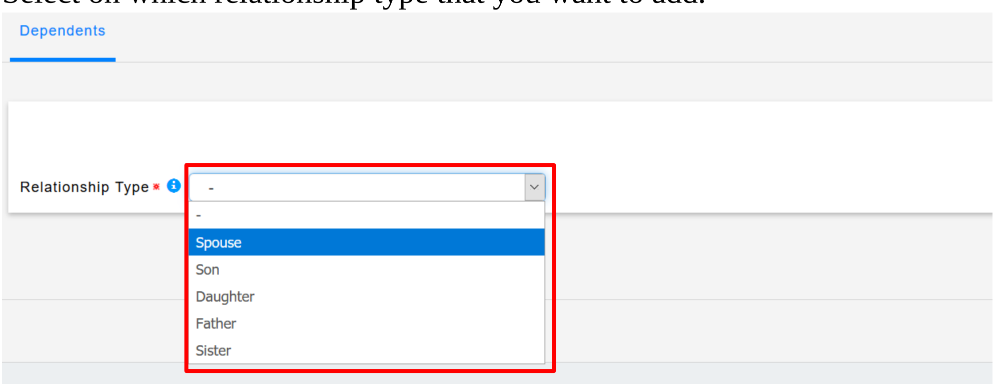


3. Select the tab [**Dependents**].
4. Click 

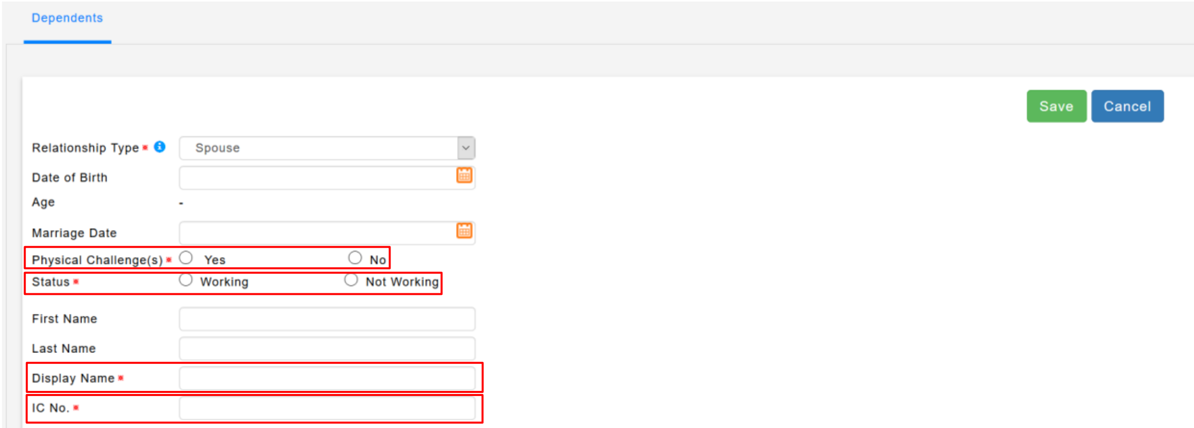
.



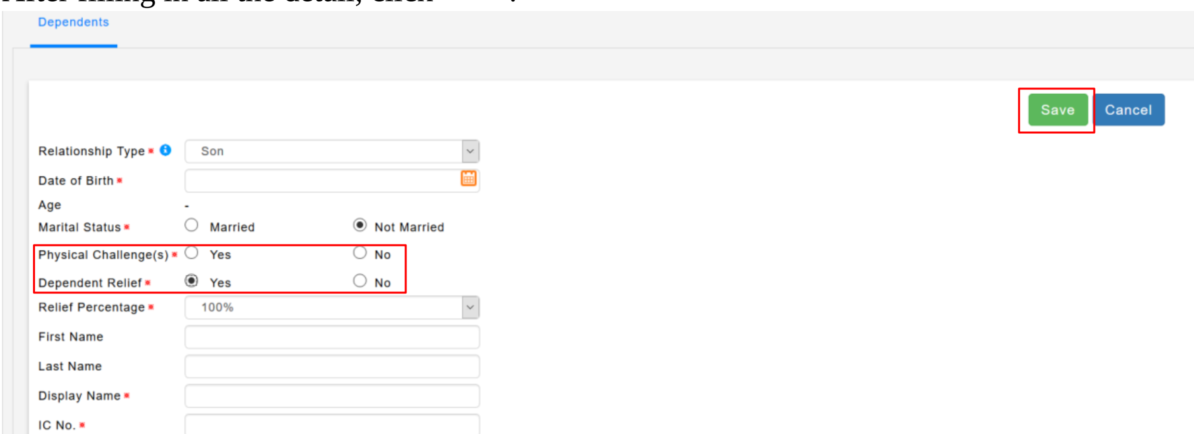
5. Select on which relationship type that you want to add.



6. Below is the spouse information that required to fill in.

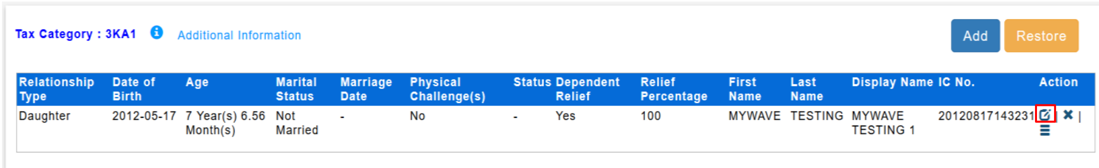


7. Once you choose son/daughter will required to select the dependent relief yes or no and if yes you may select how many percent that you want to relief as 100% or 50%.
8. After filling in all the detail, click Save.

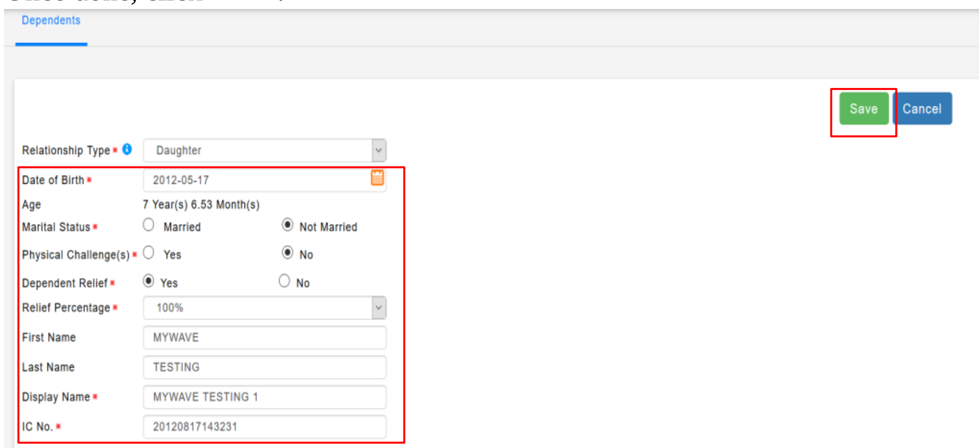


EDIT DEPENDENTS

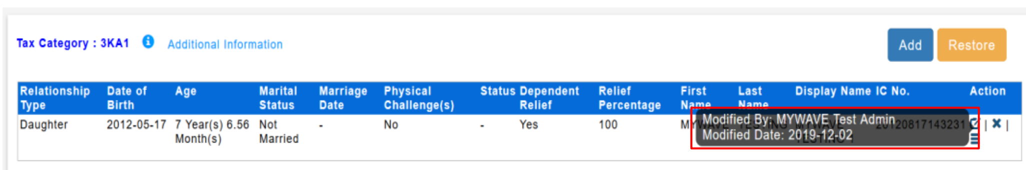
1. Click on the edit button under column action.



2. You may edit/update the detail as screenshot below.
3. Once done, click Save.

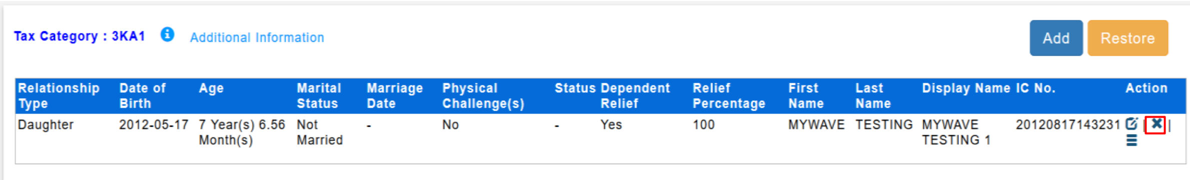


4. You can mouse over to under action to check on what is the last modified date and who modified it.

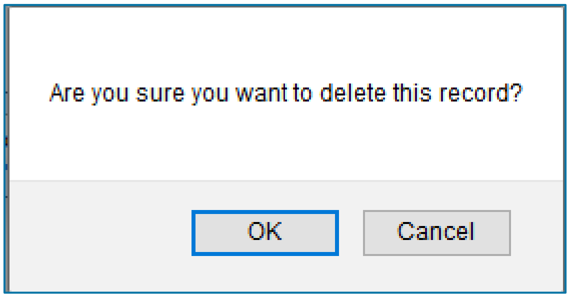


DELETE DEPENDENTS

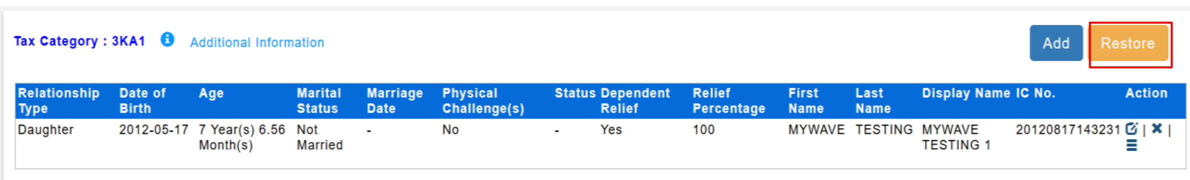
1. Click on delete button ✖ under action to delete the dependents record.



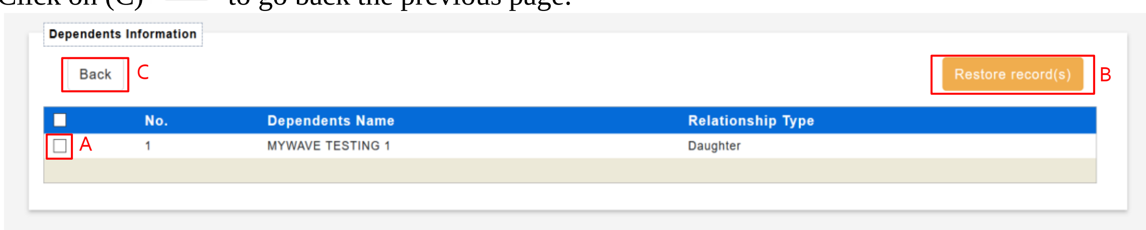
2. Click **OK** to delete.



3. Click on Restore button to check/retrieve back the deleted record.

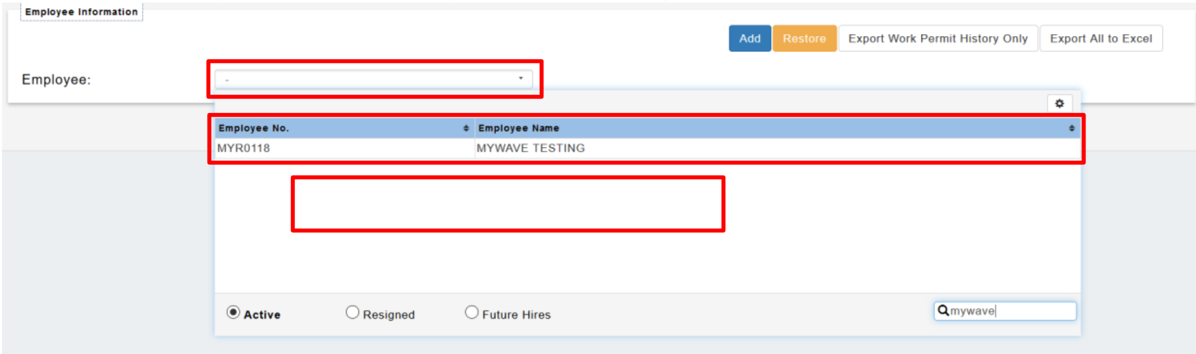


4. Tick on (A) to select on which dependent that you want to restore.
5. Click on (B) Restore record(s) to restore the selected record.
6. Click on (C) Back to go back the previous page.

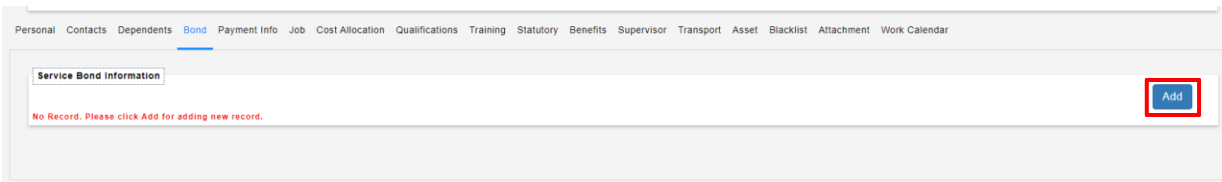


ADD BOND

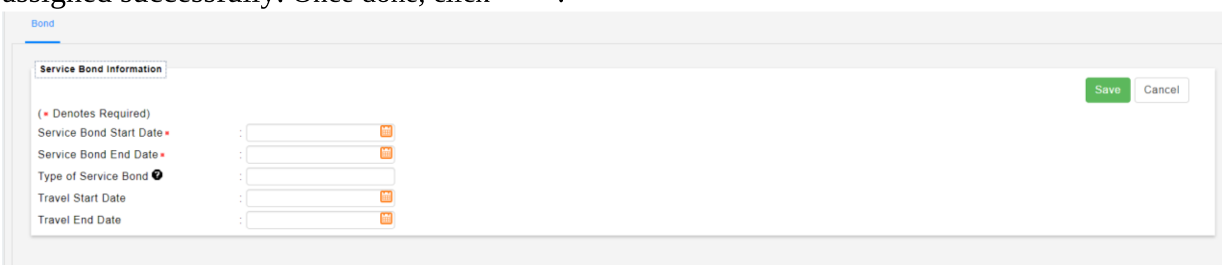
1. Go to Employee Profile → Employee Profile (Admin).
2. Select the employee in the list that you want to assign the bond



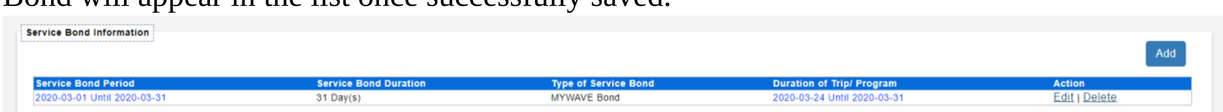
3. Select the tab [**Bond**].
4. Click Add.



5. After doing so, the following form will appear. Required field are needed to make sure bond is assigned successfully. Once done, click Save.

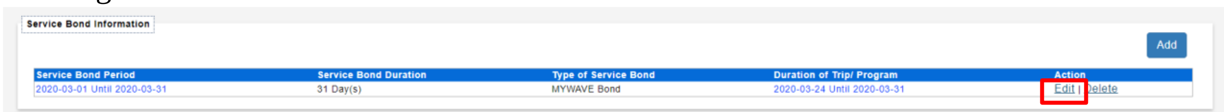


6. Bond will appear in the list once successfully saved.



EDIT BOND

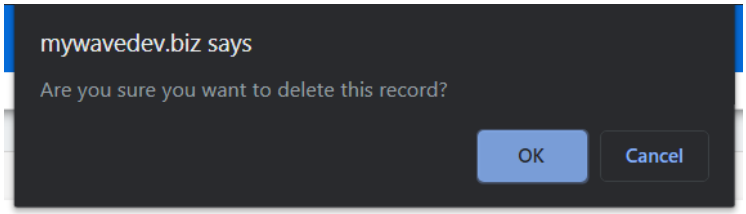
1. To make changes to the bond record, click on Edit | . After doing so, a form will appear showing the details of the current bond which can be edited.



2. Once done with the changes, click on Save to save changes made.

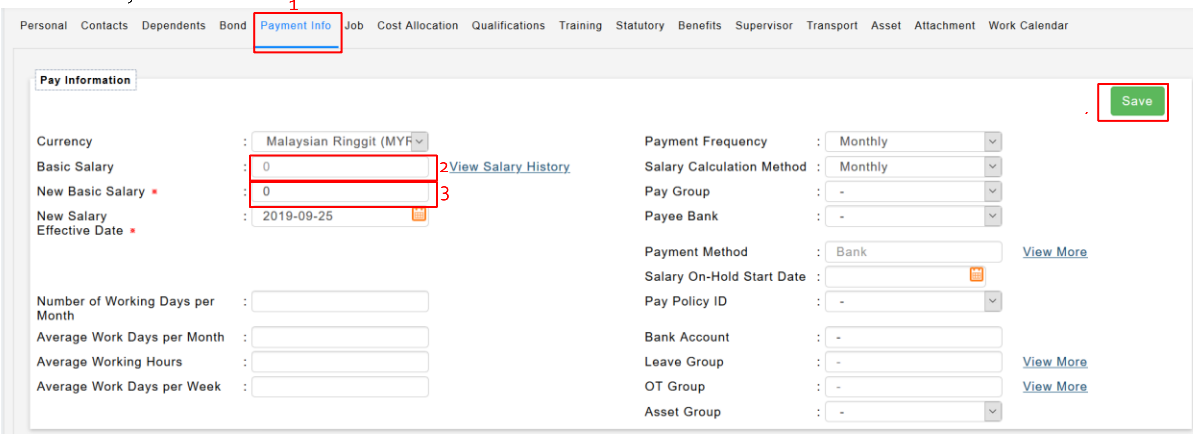
DELETE BOND

1. To delete to the bond record, click on Delete . After doing so, a confirmation message will appear. Upon confirming deletion, the bond record will no longer be present on the screen.



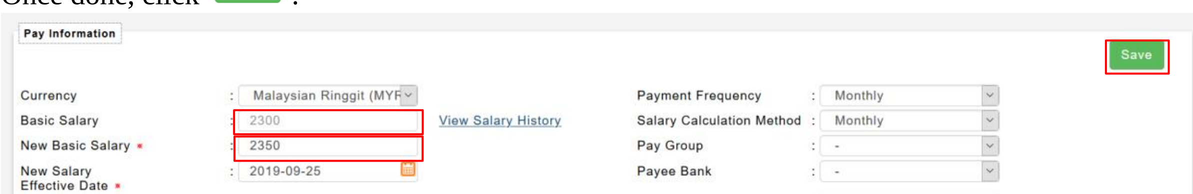
ADD SALARY

1. Go to Employee Profile -> Employee Profile (Admin) -> Select the employee that you want to add/update salary -> [Payment Info] tab.
2. Insert the new salary amount under [**New Basic Salary**].
3. Select the date for [**New Salary Effective Date**].
4. Once done, click Save .

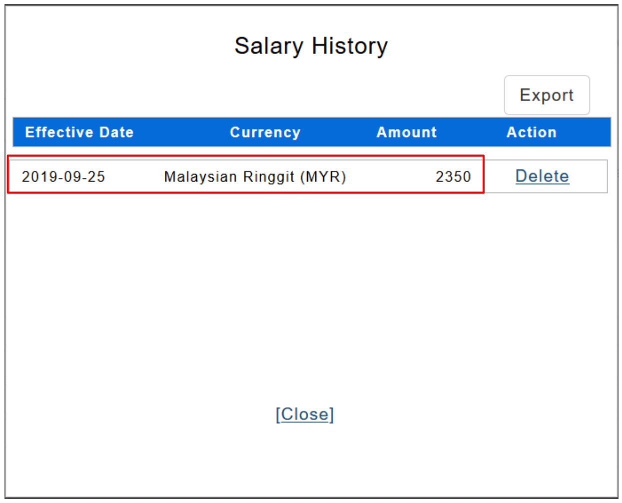


EDIT SALARY

1. Go to Employee Profile -> Employee Profile (Admin) -> Select the employee that you want to add/update salary -> [Payment Info] tab.
2. You found out there is incorrect salary amount but you have already added.
3. Insert the new salary amount under [**New Basic Salary**].
4. Select the date under [**New Salary Effective Date**] that you wish to edit the record.
5. Once done, click Save .

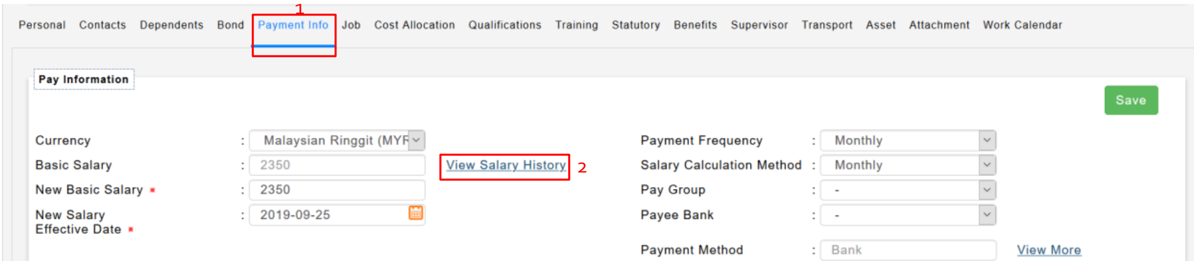


6. After save, the salary has been updated to the new amount for the date that have selected.



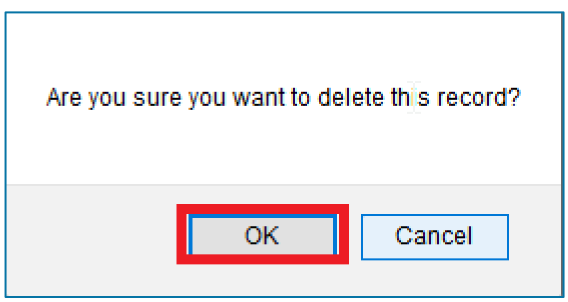
DELETE SALARY

1. Go to Employee Profile -> Employee Profile (Admin) -> Select the employee that you want to delete salary record -> [Payment Info] tab.
2. Click on View Salary History.



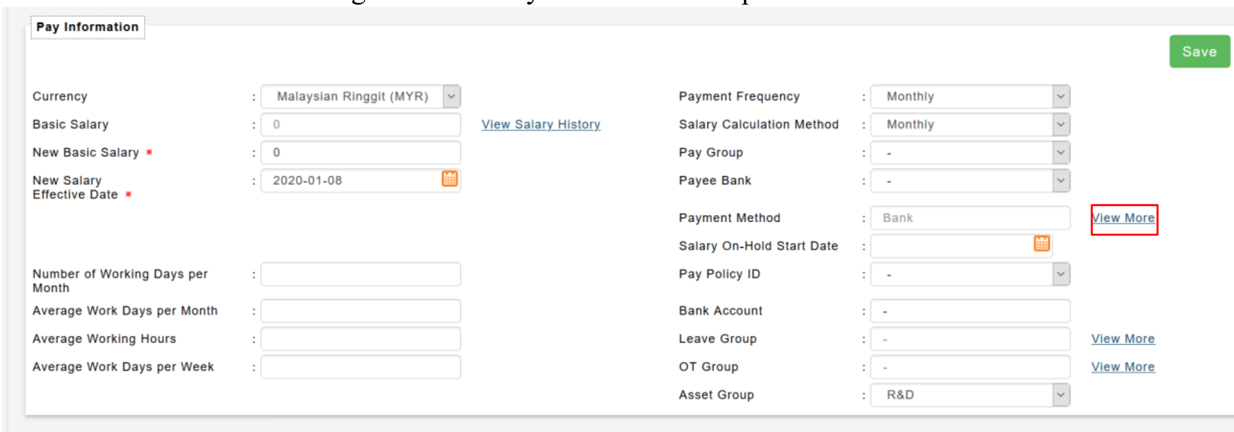
3. Click on Delete behind the record that you which to delete.

4. Click OK to delete the record.

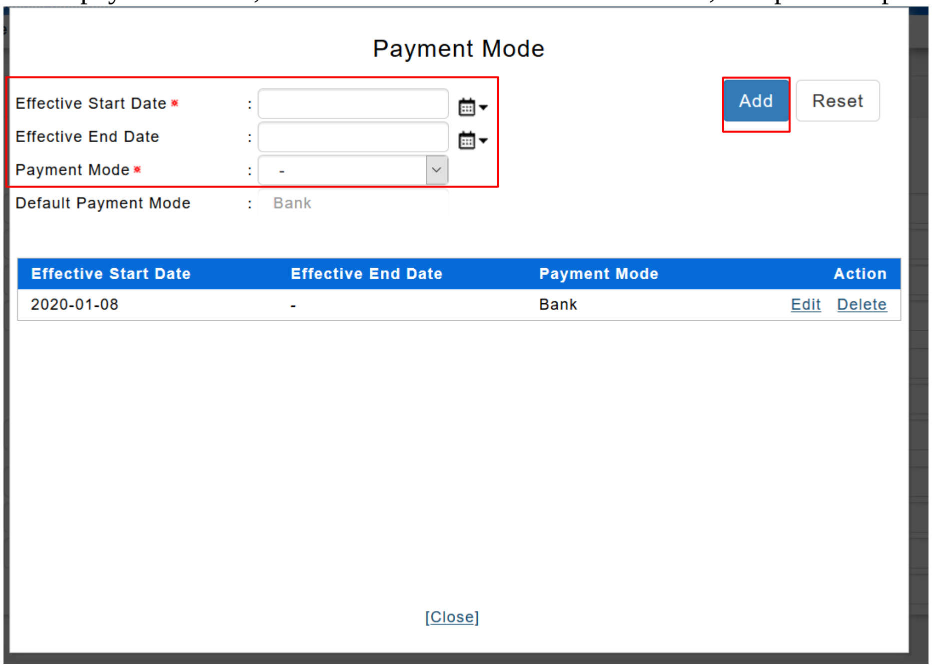


ADD PAYMENT METHOD

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **ADD** new payment method.
2. Go to the tab [**Payment Info**].
3. Click **View More** available right next to "Payment Method" input box.

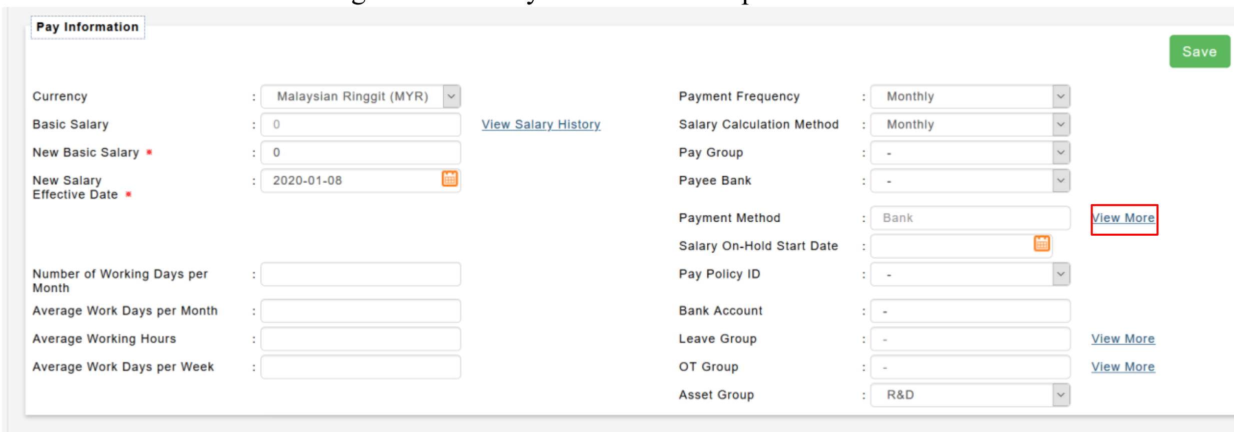


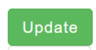
4. Do note that the default payment method will be Bank when profile is created and not assigned. To add a new payment mode, fill in the form as follow. Once filled, complete the process by clicking .

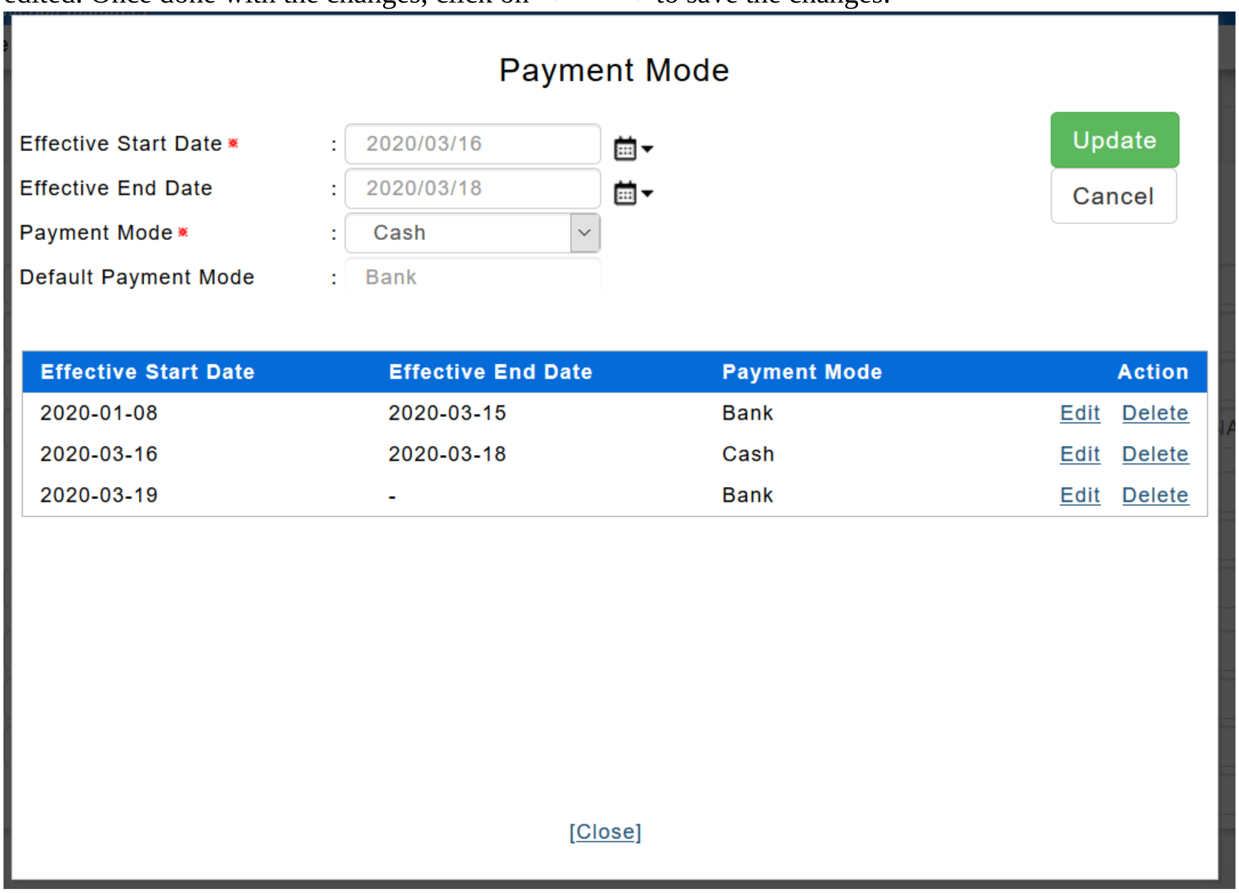


EDIT PAYMENT METHOD

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **EDIT** payment method.
2. Go to the tab [**Payment Info**].
3. Click **View More** available right next to "Payment Method" input box.

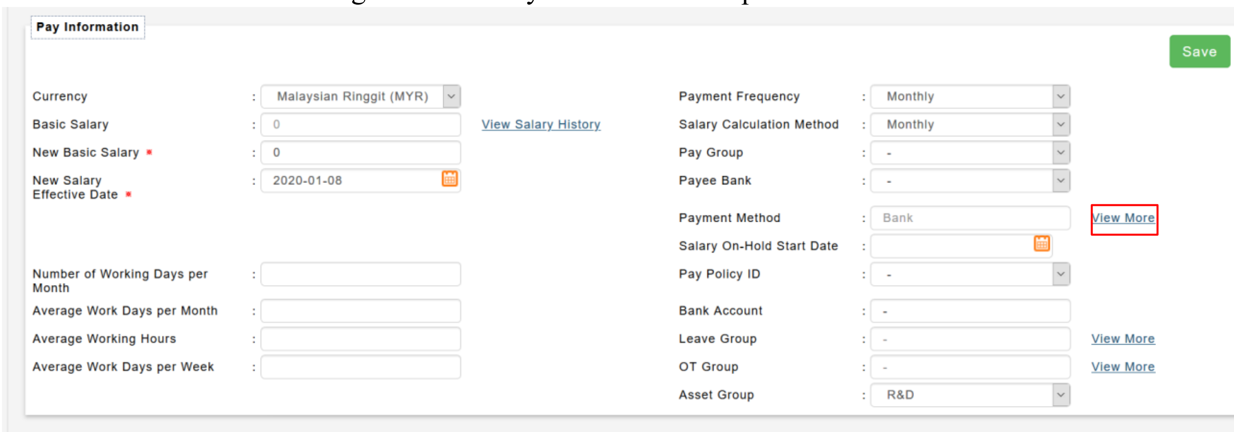


4. Click on EDIT for the selected payment method. The form will be filled with its details and ready to be edited. Once done with the changes, click on  to save the changes.

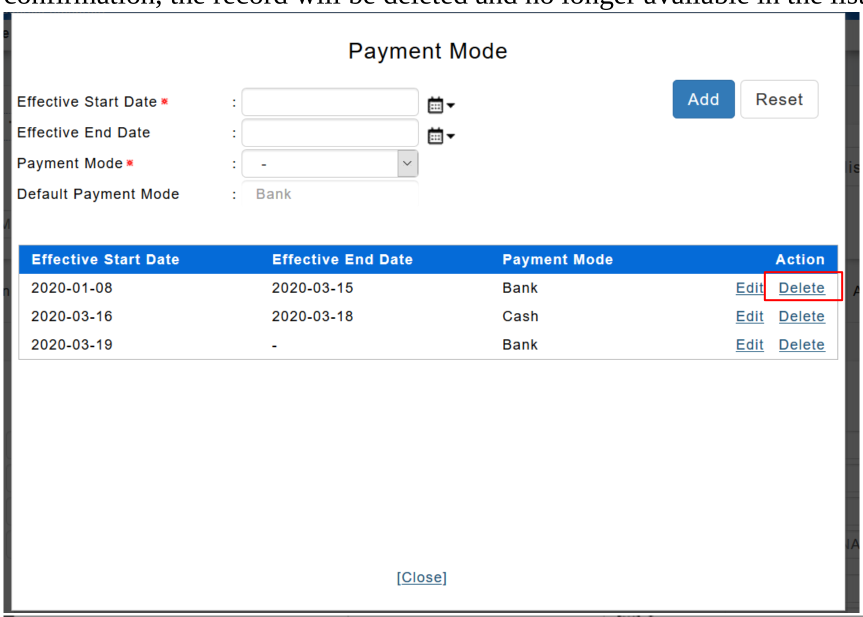


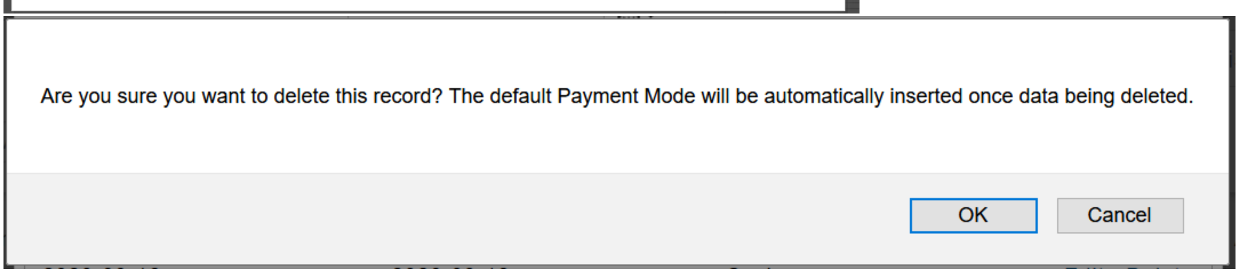
DELETE PAYMENT METHOD

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **DELETE** payment method.
2. Go to the tab [**Payment Info**].
3. Click **View More** available right next to "Payment Method" input box.



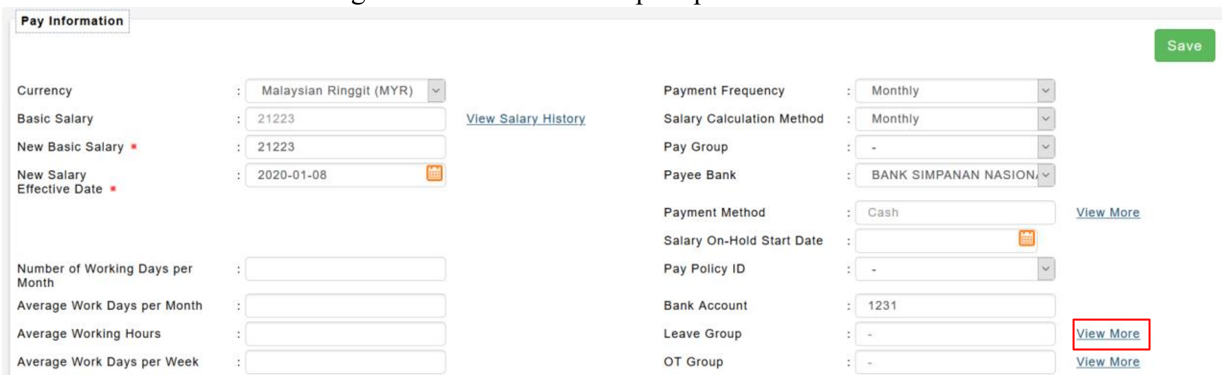
4. Click on Delete for the selected payment method. A confirmation message will appear, Upon confirmation, the record will be deleted and no longer available in the list of payment mode records.

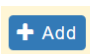


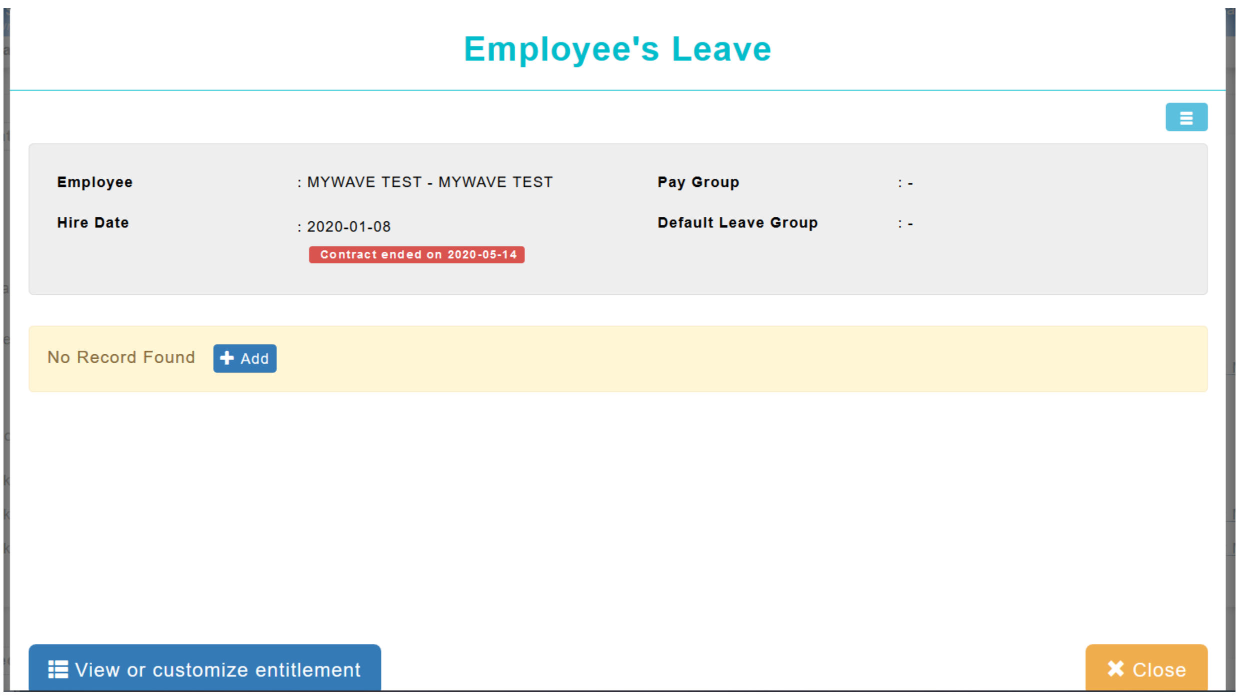


ADD LEAVE GROUP

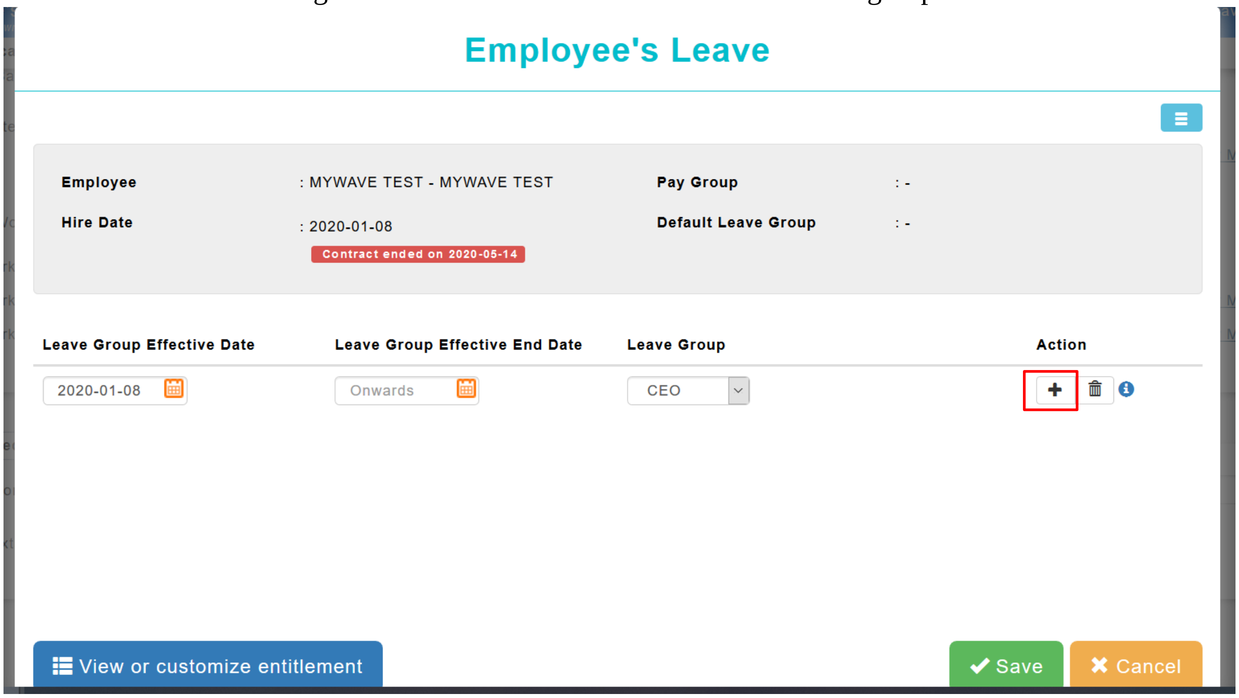
1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **ASSIGN** leave group.
2. Go to the tab [**Payment Info**].
3. Click **View More** available right next to "Leave Group" input box.



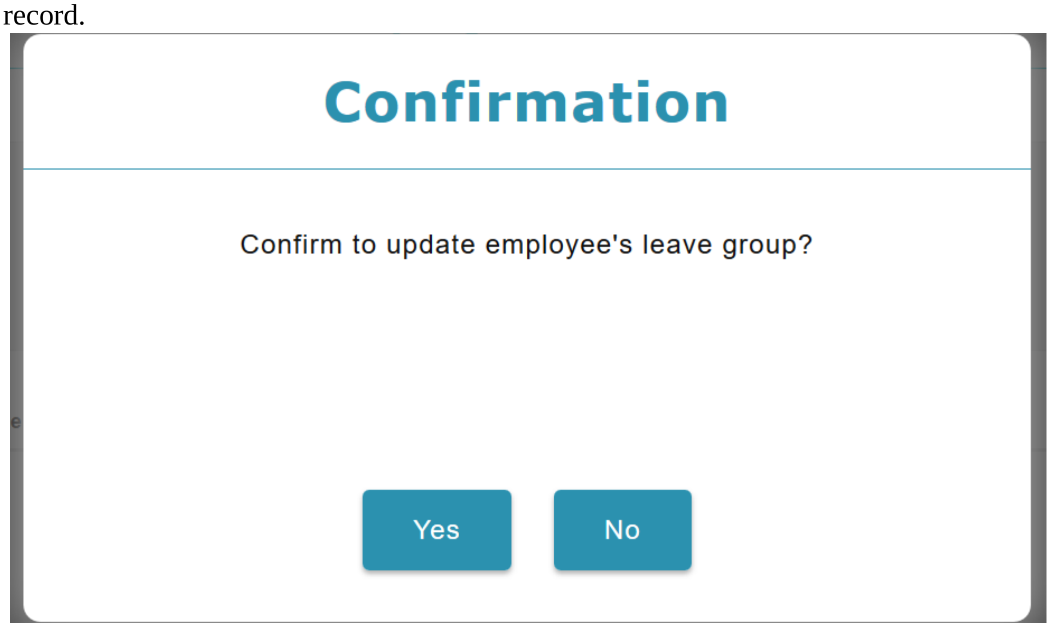
4. After doing so, a pop up will appear for leave group assignation. To assign leave group, click on  .



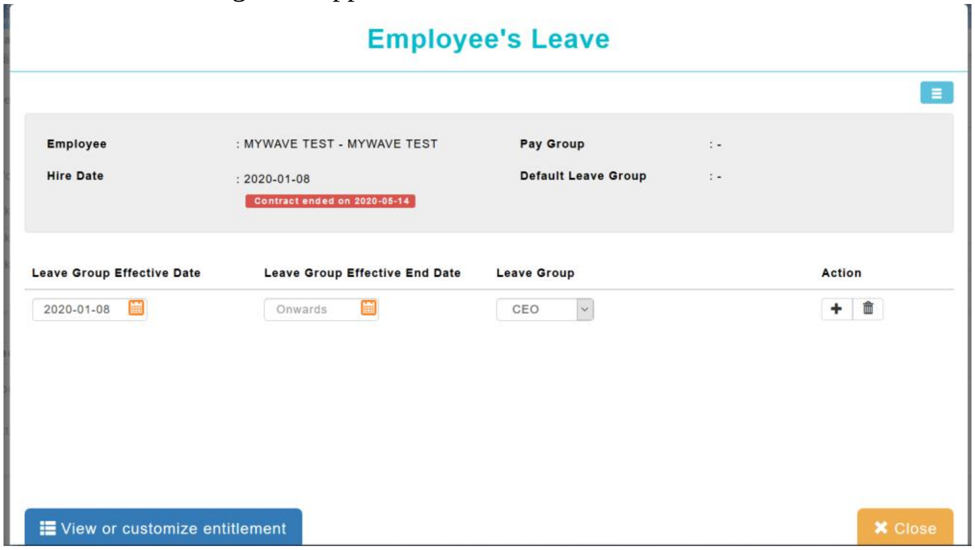
5. A from will appear allowing admin to select the type of leave group to assign and insert effective and end effective date. Clicking on ➕ will allow admin to add more leave group.



6. To complete the process, click on Save and a confirmation massage will appear. Pick yes to save the record.

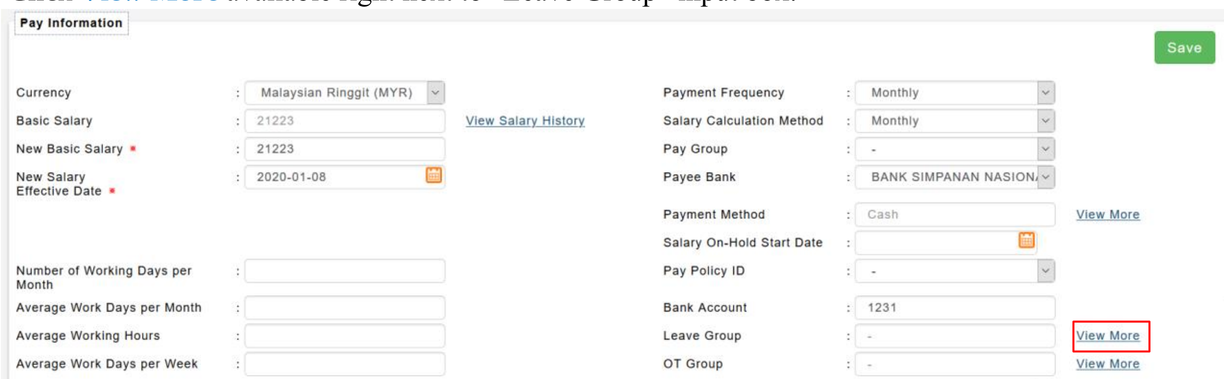


7. A successful message will appear and the created record will be in the list.



EDIT LEAVE GROUP

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **EDIT** leave group.
2. Go to the tab [**Payment Info**].
3. Click **View More** available right next to “Leave Group” input box.

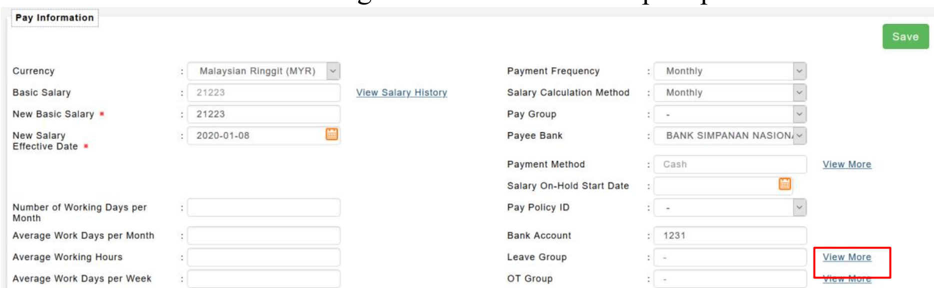


4. Any changes towards the current leave group record will count as editing the record. To complete the process, click on 

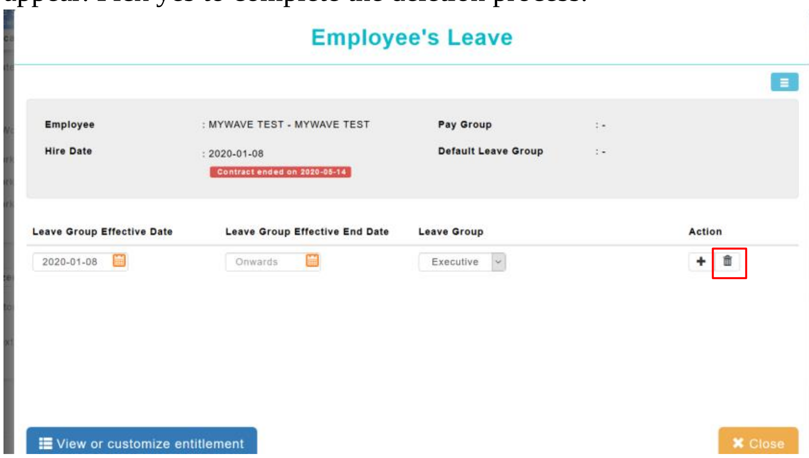
and a confirmation massage will appear. Pick yes to save the changes.

DELETE LEAVE GROUP

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **EDIT** leave group.
2. Go to the tab [**Payment Info**].
3. Click **View More** available right next to "Leave Group" input box.

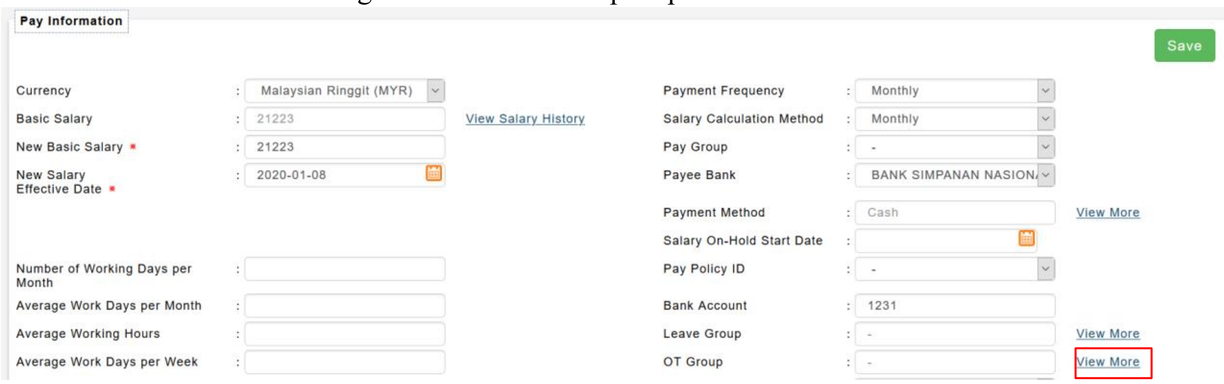


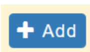
4. Click on 🗑 to delete the record. To save changes, click on **Save** and a confirmation massage will appear. Pick yes to complete the deletion process.



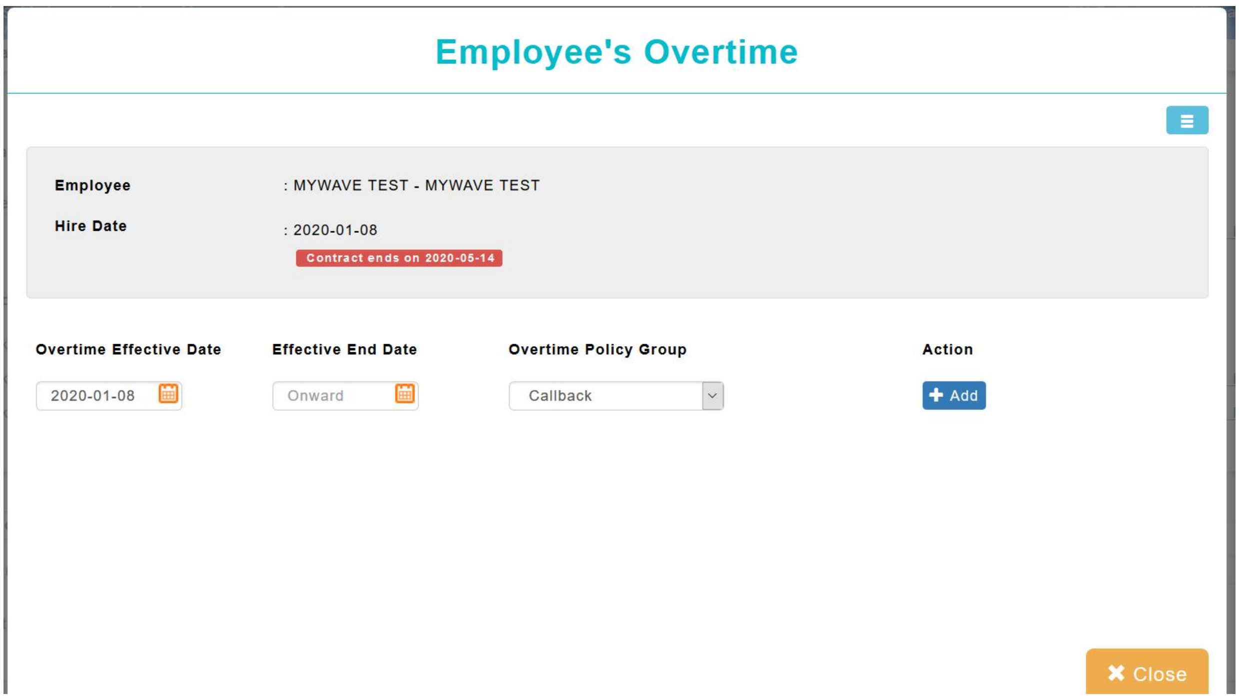
ADD OVERTIME GROUP

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **ASSIGN** overtime group.
2. Go to the tab [**Payment Info**].
3. Click **View More** available right next to "OT Group" input box.

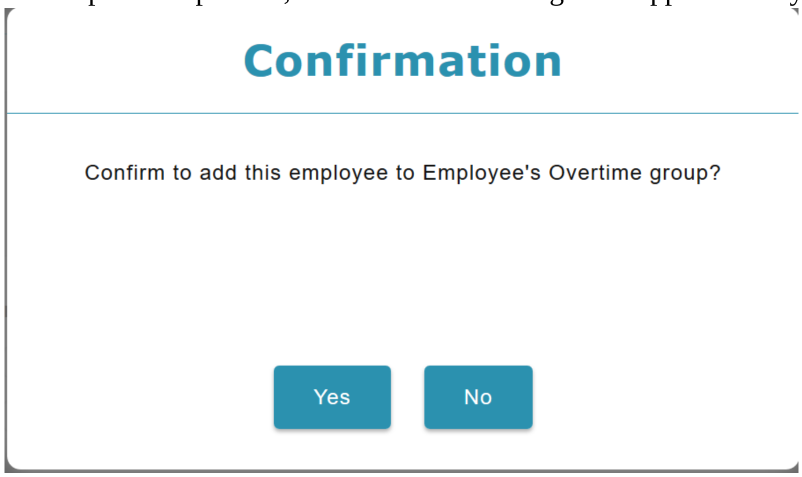


4. After doing so, a pop up will appear for overtime group assignation. To assign overtime group, click on 

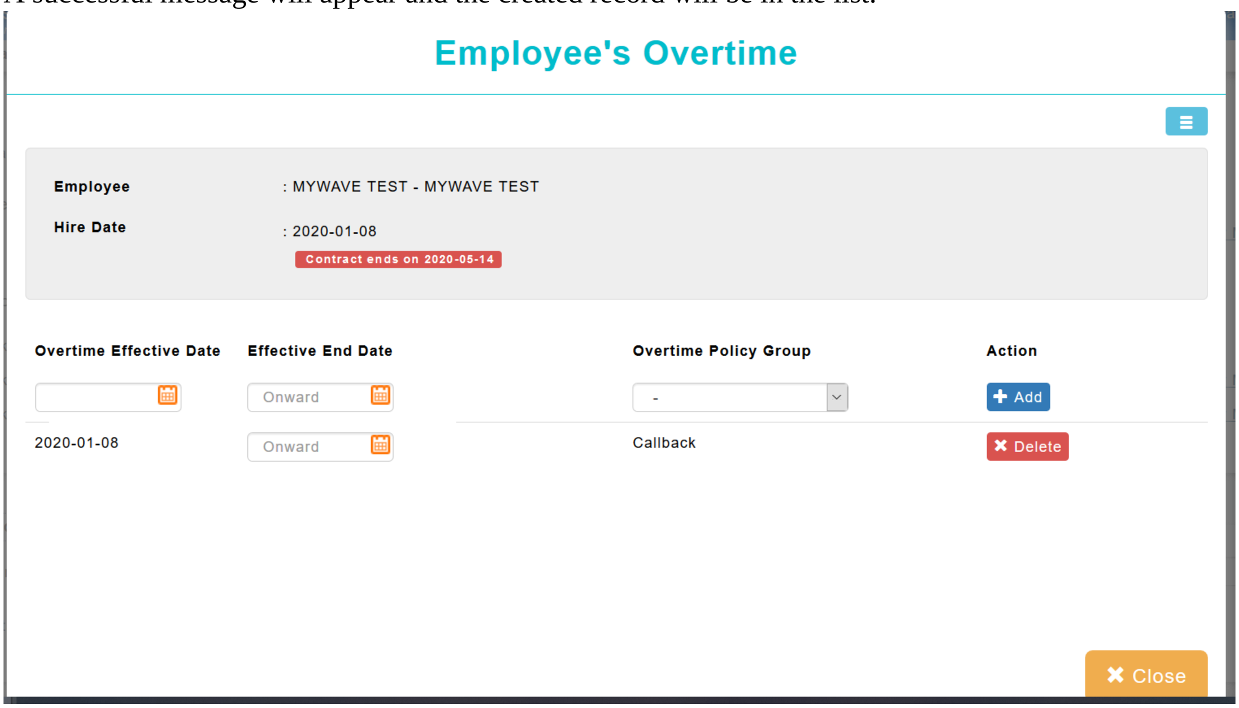
after selecting overtime policy group and effective date. Effective end date is an optional field.



5. To complete the process, a confirmation massage will appear. Pick yes to save the record.

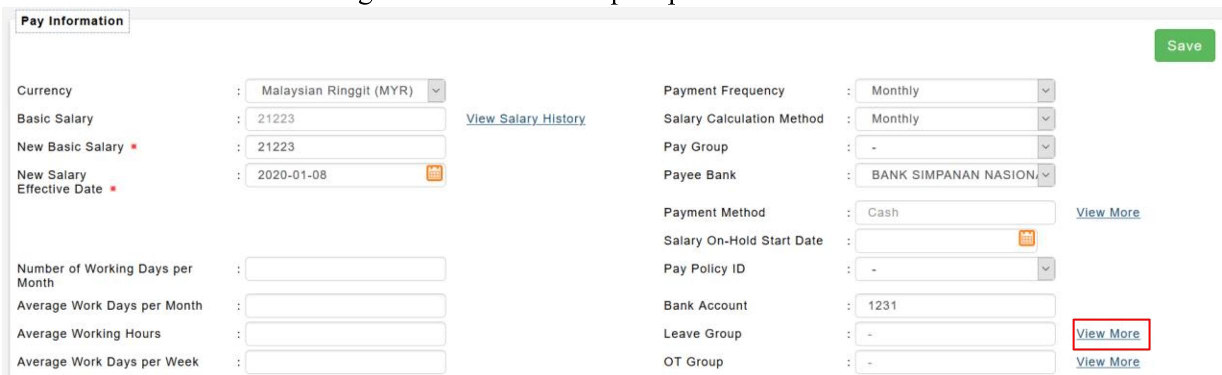


6. A successful message will appear and the created record will be in the list.



EDIT OVERTIME GROUP

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **EDIT** leave group.
2. Go to the tab [**Payment Info**].
3. Click **View More** available right next to “OT Group” input box.

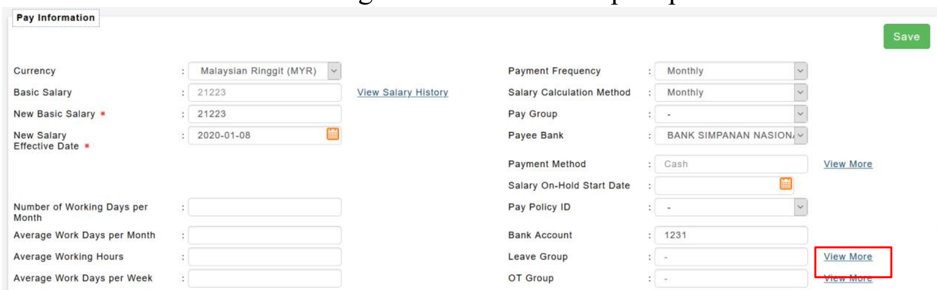


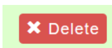
4. Any changes towards the current overtime group record will count as editing the record. To complete the process, click on 

and a confirmation massage will appear. Pick yes to save the changes.

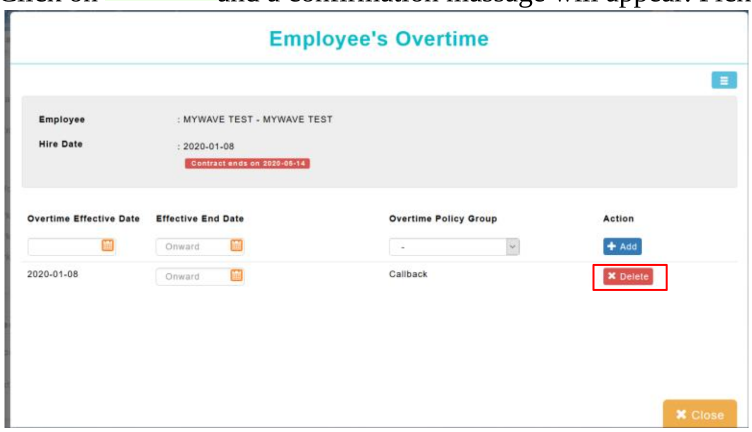
DELETE OVERTIME GROUP

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **EDIT** leave group.
2. Go to the tab [**Payment Info**].
3. Click **View More** available right next to “OT Group” input box.



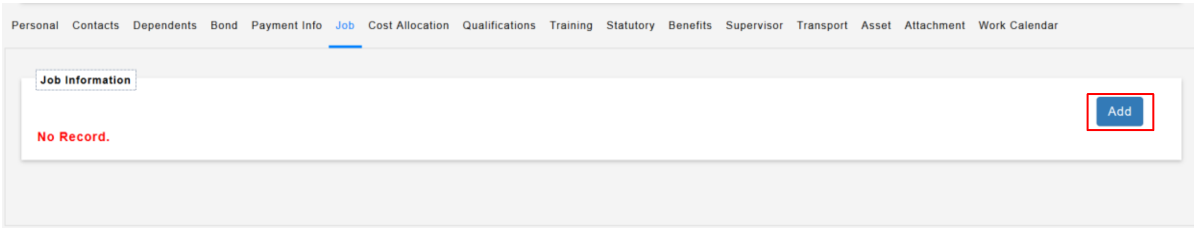
4. Click on 

and a confirmation massage will appear. Pick yes to complete the deletion process.

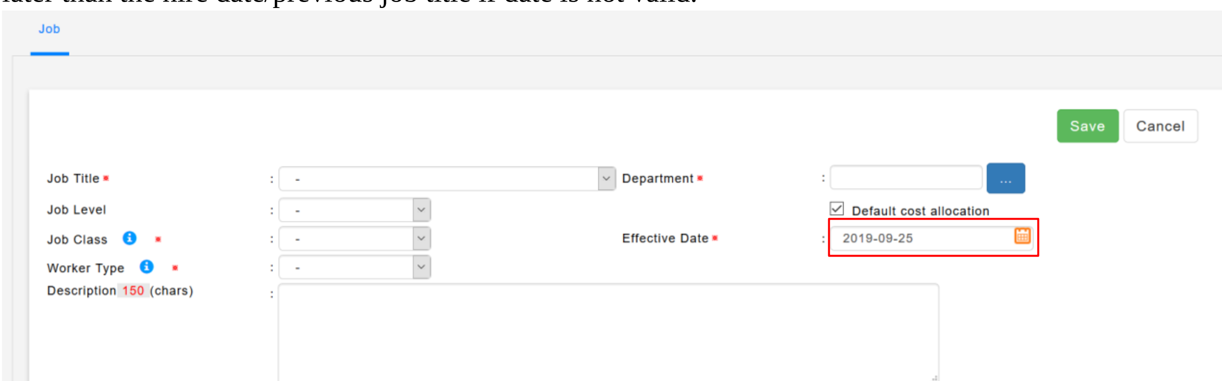


ADD JOB INFORMATION

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **ADD** new job title.
2. Go to the tab [**Job**].
3. Click **Add**.

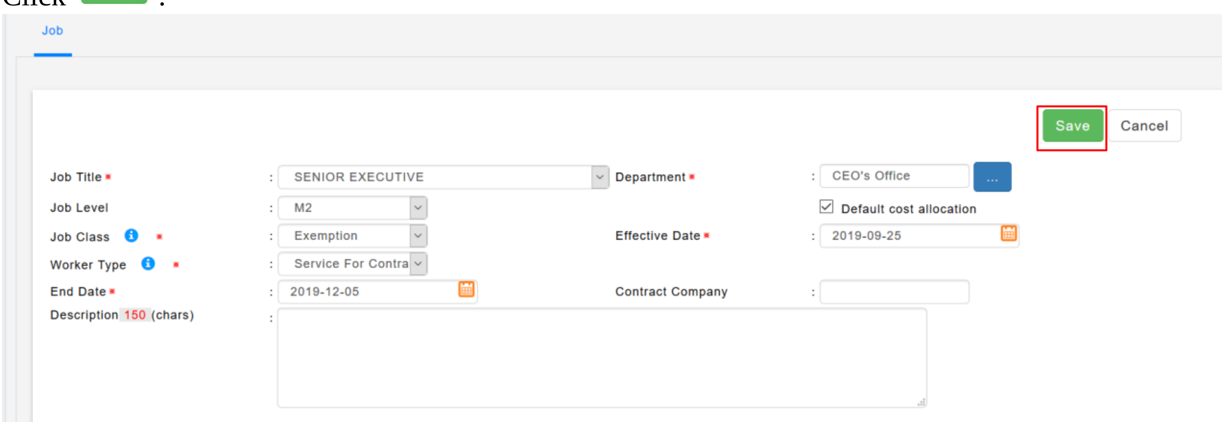


4. Do note that the Effective Date cannot be same with the previous job title. Change the Effective Date later than the hire date/previous job title if date is not valid.

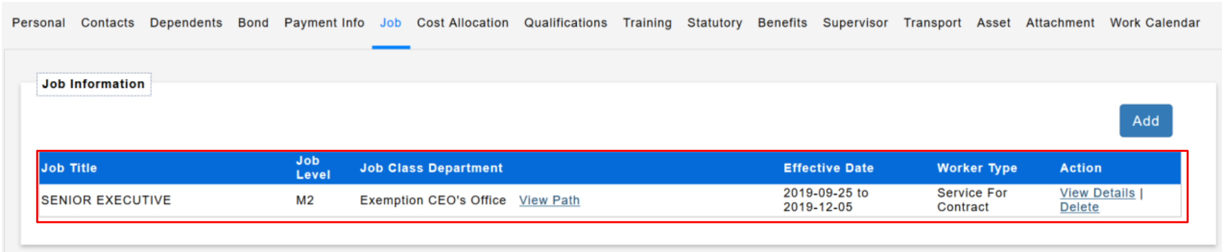


5. Click 

.



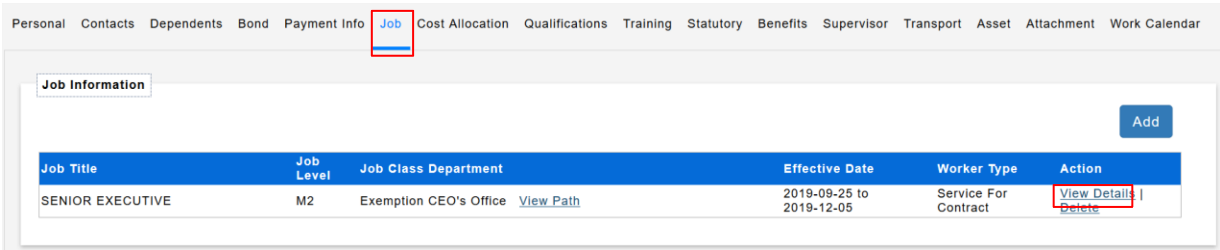
6. The employee’s job information will show Job Title as screenshot below.



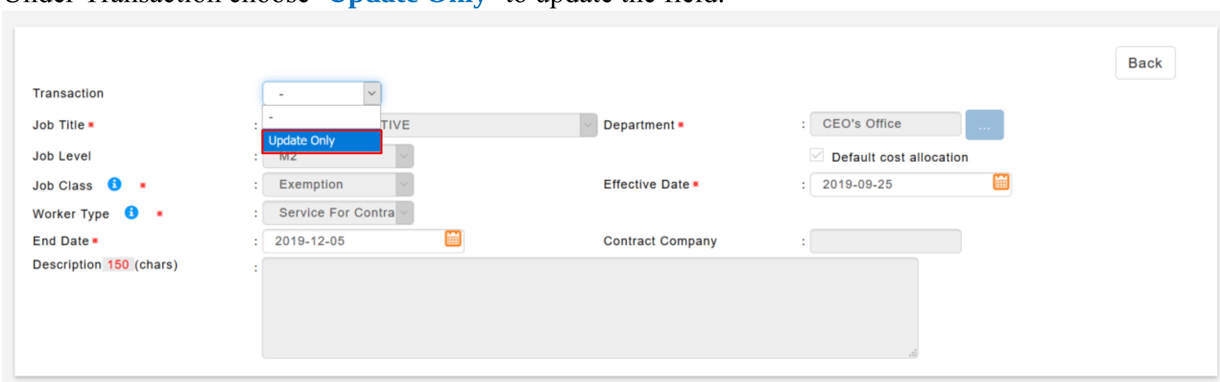
Job Title	Job Level	Job Class Department	Effective Date	Worker Type	Action
SENIOR EXECUTIVE	M2	Exemption CEO's Office View Path	2019-09-25 to 2019-12-05	Service For Contract	View Details | Delete

EDIT JOB INFORMATION

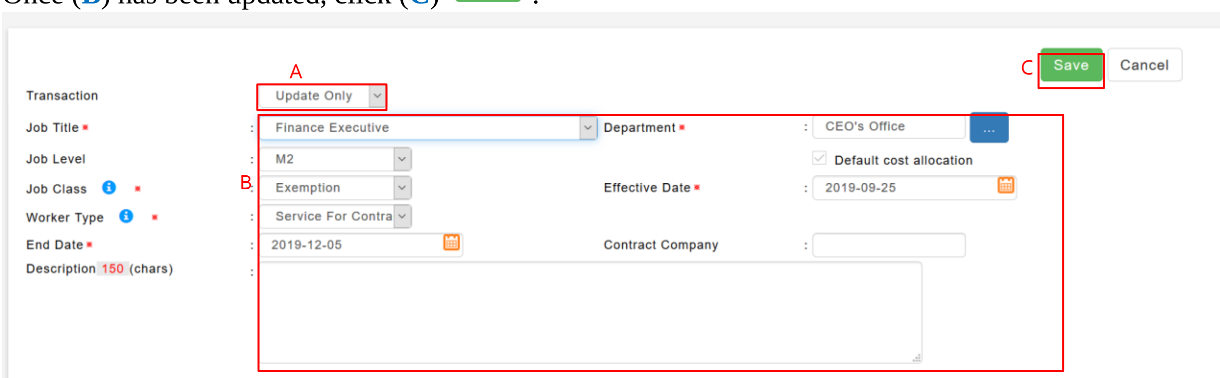
1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **Update** job title.
2. Go to the tab [**Job**].
3. Click on the button View Details .



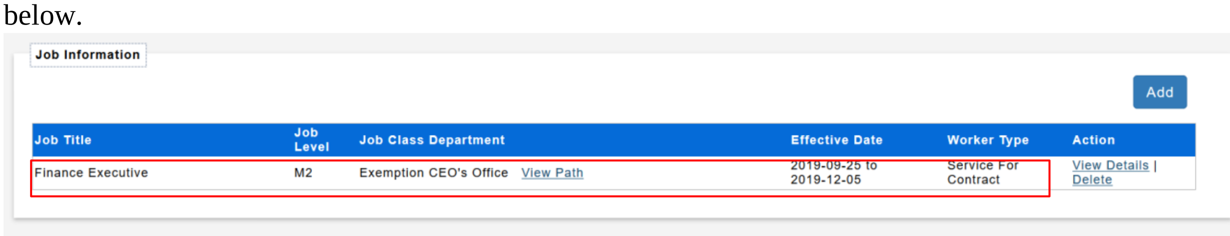
4. Once click in view detail, the field is not able to edit.
5. Under Transaction choose '**Update Only**' to update the field.



6. Once transaction change to '**Update Only**' (**A**), the field (**B**) will able to update.
7. Once (**B**) has been updated, click (**C**) Save .

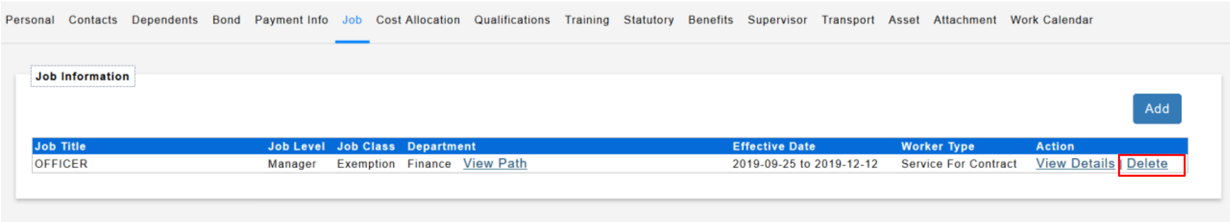


8. If you have updated the job title, the updated detail will show in the employee's job information as below.

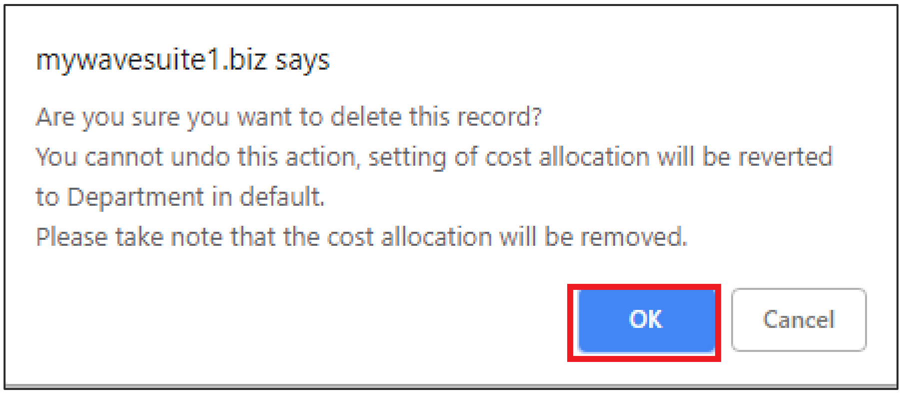


DELETE JOB INFORMATION

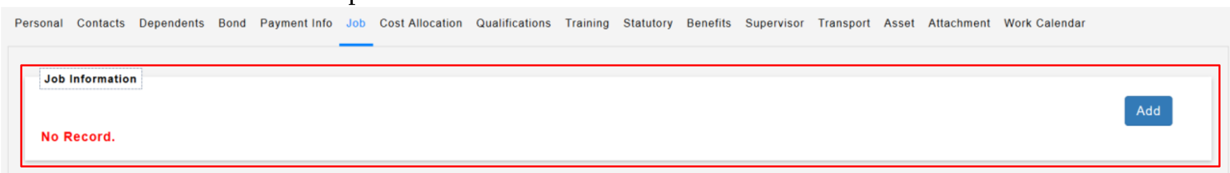
1. Go to Employee Profile → Employee Profile (Admin) → select the employee that you want to **Update** job title.
2. Go to the tab [**Job**].
3. Click on the button Delete that you wish to delete.



4. After click delete will prompt a message box as screenshot below.
5. Click **OK** to confirm delete.

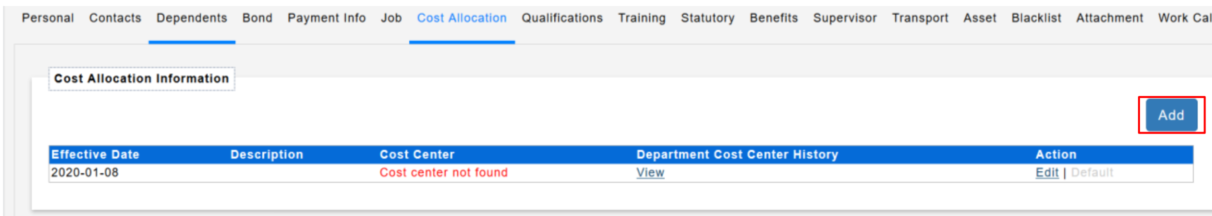


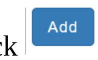
6. The record will be deleted as per screenshot below.



ADD COST ALLOCATION

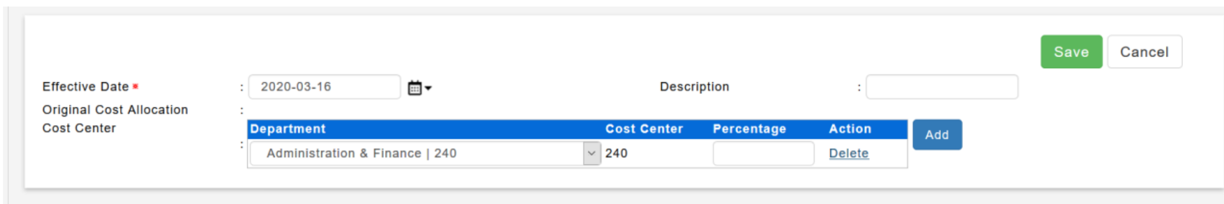
1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **ADD** new cost center record.
2. Go to the tab [**Cost Allocation**].
3. Click **Add**.



4. Effective date is required to be filled first before list of available department cost center appears. After selecting a department, admin can fill in the percentage. More then one cost center can be assigned towards the employee. To create another cost center record, click 

. If record is not required, click on 

to delete record.

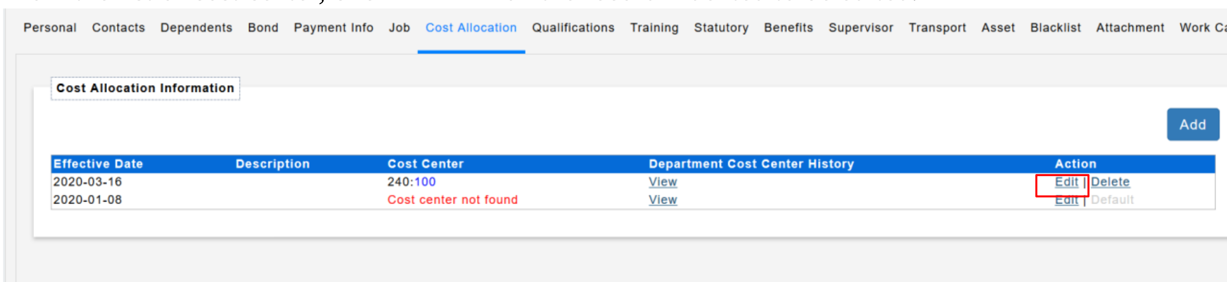


5. Click on 

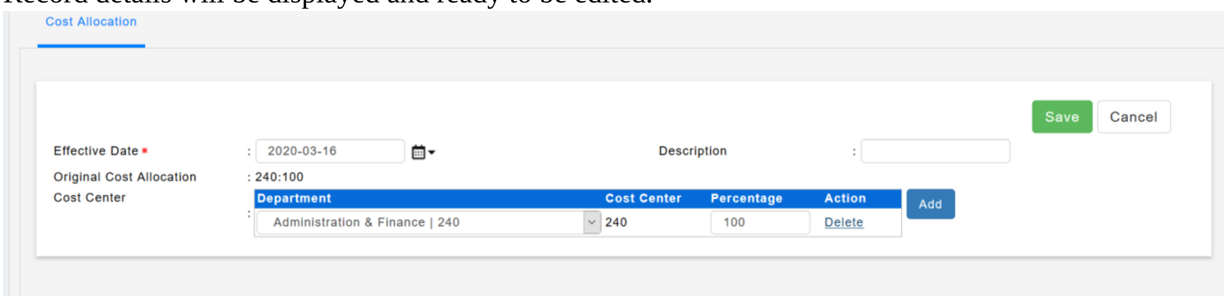
to save record.

EDIT COST ALLOCATION

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **EDIT** new cost center record.
2. Go to the tab [**Cost Allocation**].
3. From the list of cost center, click  on the record indented to be edited.



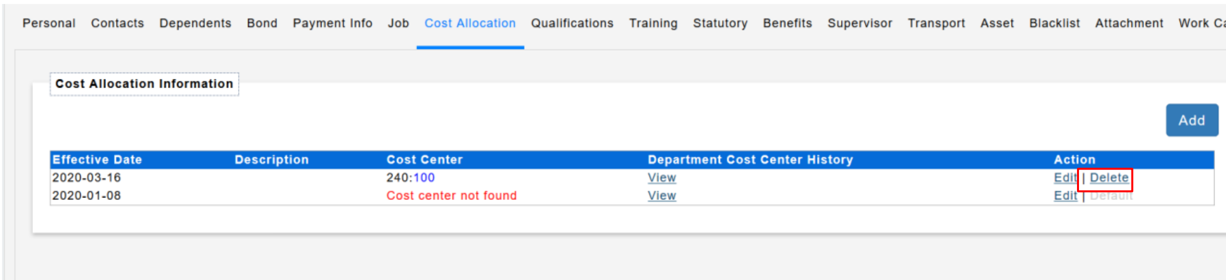
4. Record details will be displayed and ready to be edited.



5. Click on  to save record.

DELETE COST ALLOCATION

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **DELETE** cost center record.
2. Go to the tab [**Cost Allocation**].
3. Click Delete .

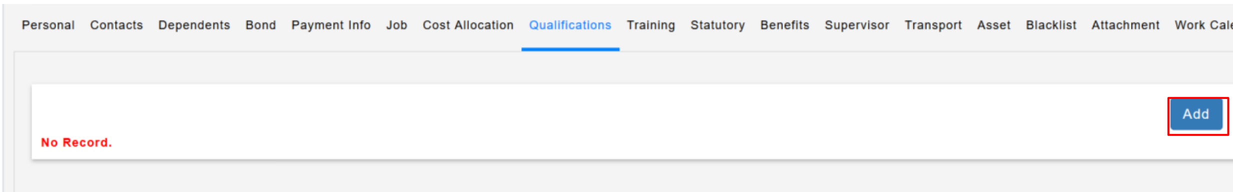


4. A confirmation message will appear. Upon confirming, record will no longer be seen in the list.

ADD QUALIFICATION

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **ADD** qualification record.
2. Go to the tab [**Qualification**].
3. Click 

.



4. The qualification form will appear allowing admin to insert employee's qualification record. Upon completion, click on 

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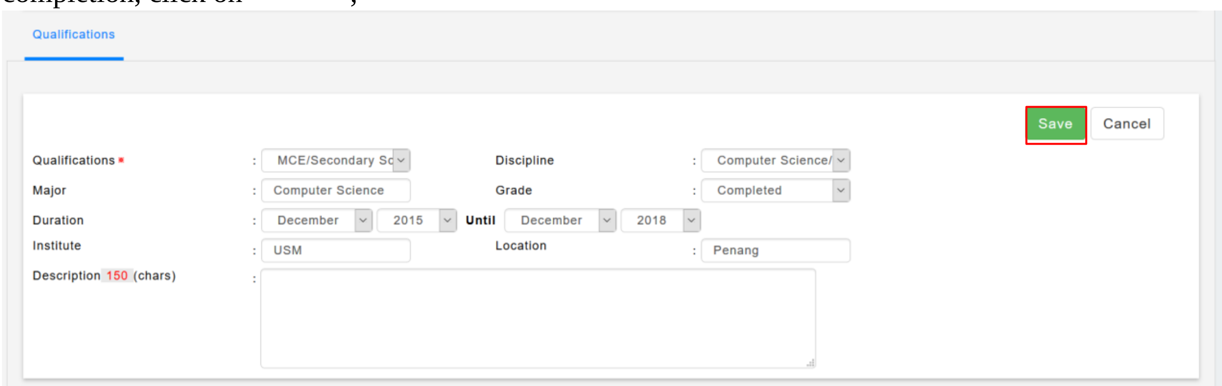
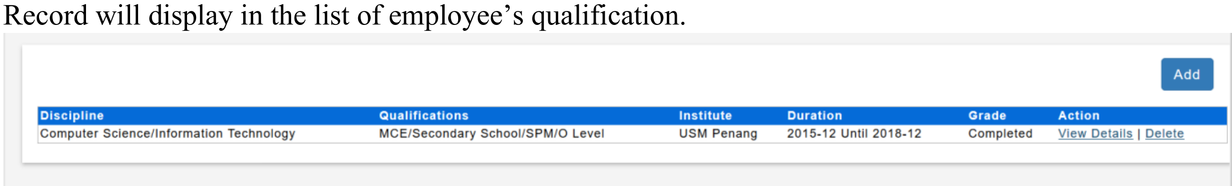
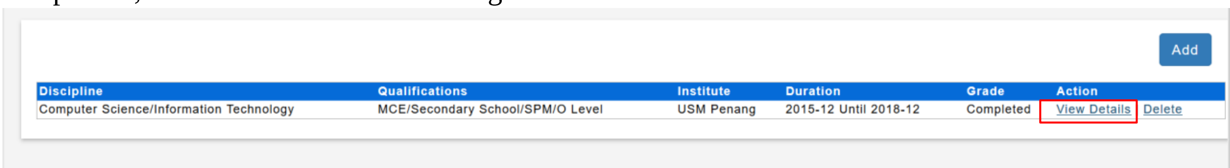


5. Record will display in the list of employee's qualification.



EDIT QUALIFICATION

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **ADD** qualification record.
2. Go to the tab [**Qualification**].
3. Click View Details to load selected qualification form. Changes can be done straight onto the form. Upon completion, click on Save to save changes.

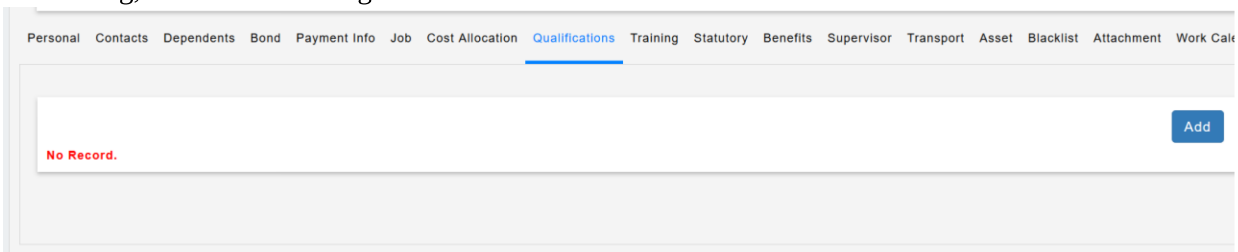


Add

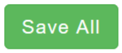
Discipline	Qualifications	Institute	Duration	Grade	Action
Computer Science/Information Technology	MCE/Secondary School/SPM/O Level	USM Penang	2015-12 Until 2018-12	Completed	View Details Delete

DELETE QUALIFICATION

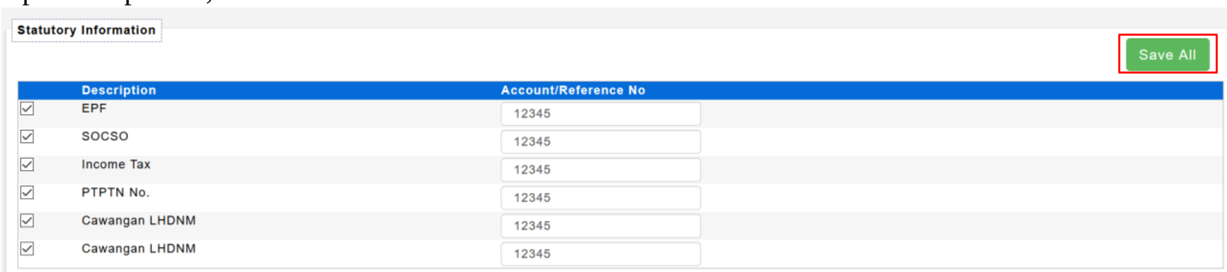
1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **DELETE** qualification record.
2. Go to the tab [**Qualification**].
5. Click Delete to delete selected qualification record. A confirmation message will appear. Upon confirming, record will no longer be seen in the list.



ADD STATUTORY INFORMATION

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **ADD** statutory records.
2. Go to the tab [**Statutory**].
3. A form will be present to the admin allowing them to add employee's info straight into the form. Upon completion, click 

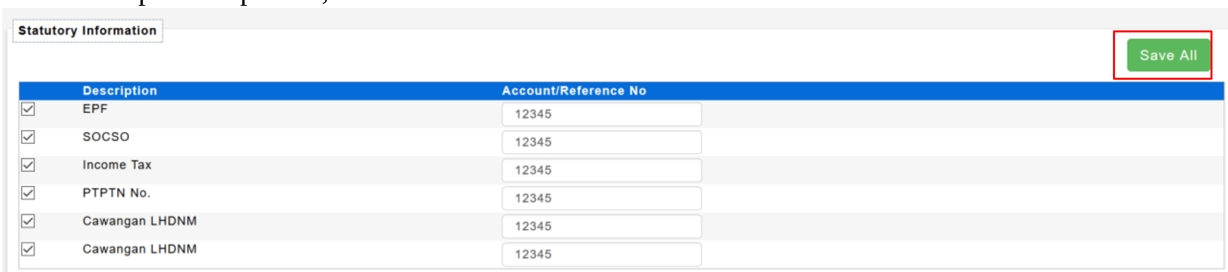
to save records.



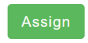
EDIT STATUTORY INFORMATION

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **EDIT** statutory records.
2. Go to the tab [**Statutory**].
3. A form will be present to the admin allowing them to edit existing employee's info straight into the form. Upon completion, click 

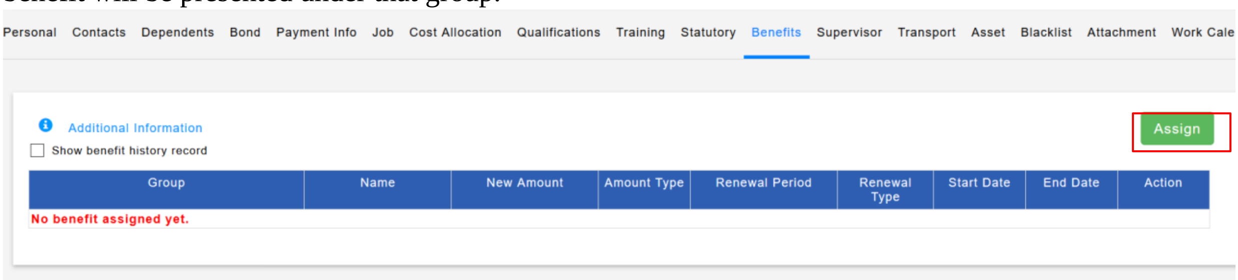
to save records.



Add Benefit Group

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **ADD** benefit records.
2. Go to the tab [**Benefits**].
3. To assign a new benefit record, click on 

 and admin will be presented with a page show benefits detail. Select a benefit group from the dropdown to assign under the employee. Start Date is required to successfully insert the record. From picking the benefit group, a list of benefit will be presented under that group.



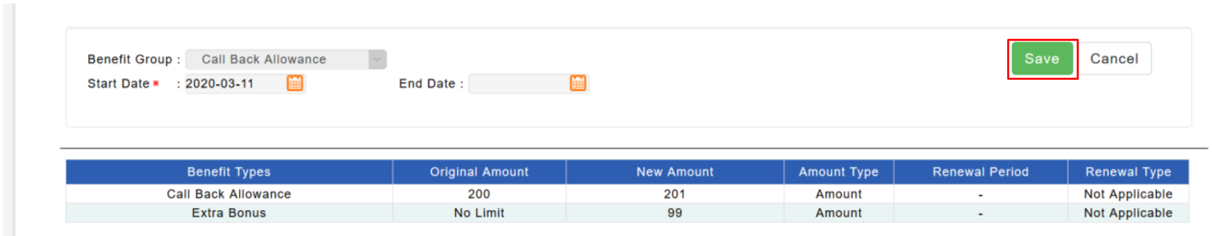
4. After all is done, click 

 to save the benefit record.

EDIT BENEFIT GROUP

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **EDIT** benefit records.
2. Go to the tab [**Benefits**].
3. Click on and admin will be presented with the selected benefit details. The changes towards the benefit group information will be reflected to the current employee's list of benefits.

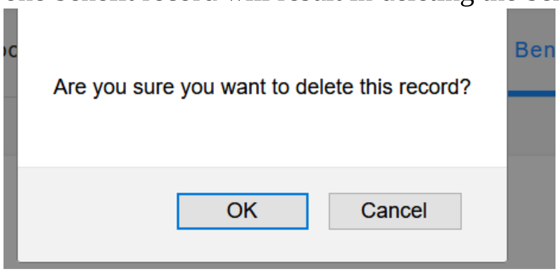
   After all is done, click Save to save the benefit record.

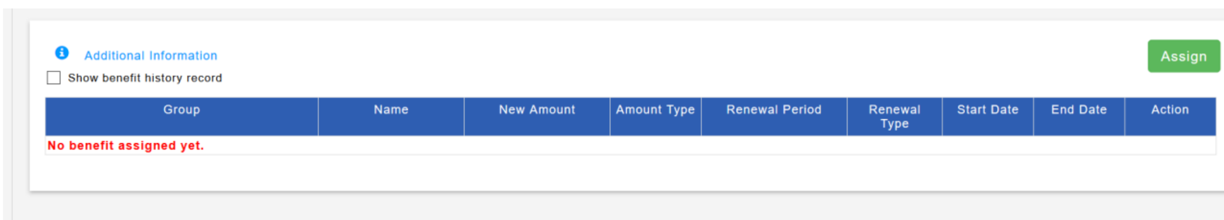


Benefit Types	Original Amount	New Amount	Amount Type	Renewal Period	Renewal Type
Call Back Allowance	200	201	Amount	-	Not Applicable
Extra Bonus	No Limit	99	Amount	-	Not Applicable

DELETE BENEFIT GROUP

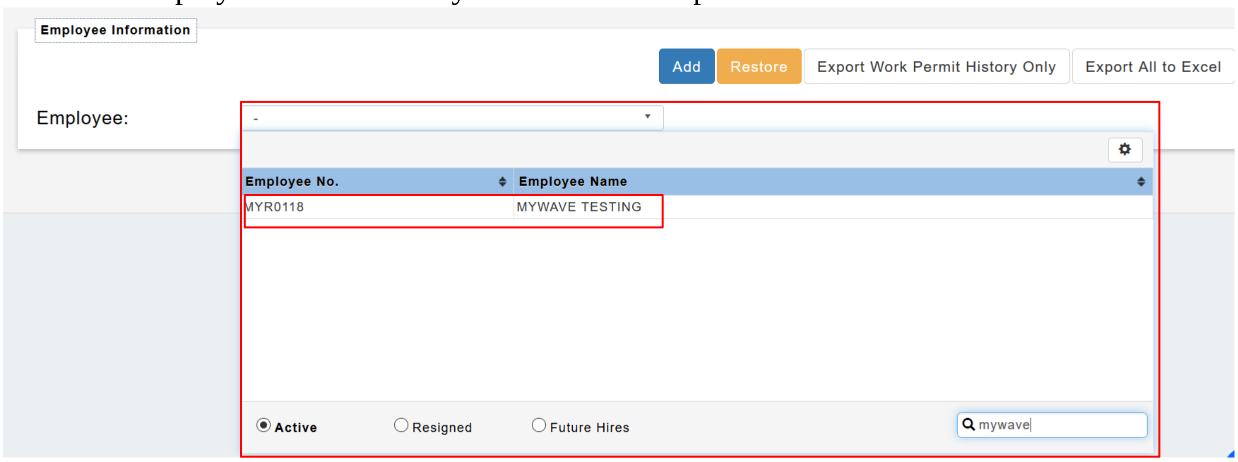
1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **EDIT** benefit records.
2. Go to the tab [**Benefits**].
3. To delete the benefit records, click on  and admin will be presented with a confirmation message. Upon confirming, the record will no longer be present in the list. Do note that deleting one benefit record will result in deleting the benefit group assigned to employee.



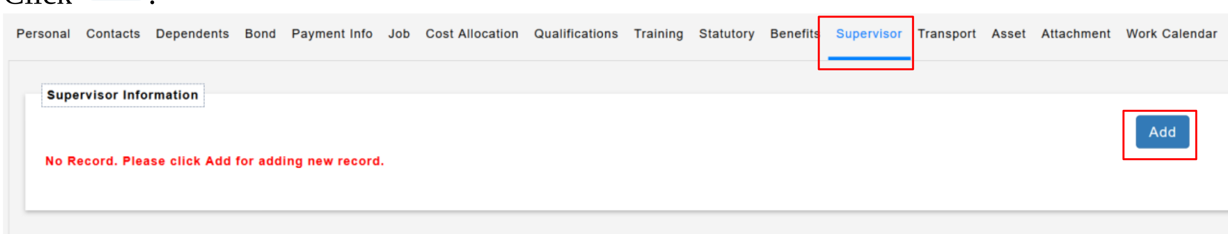


ADD SUPERVISOR

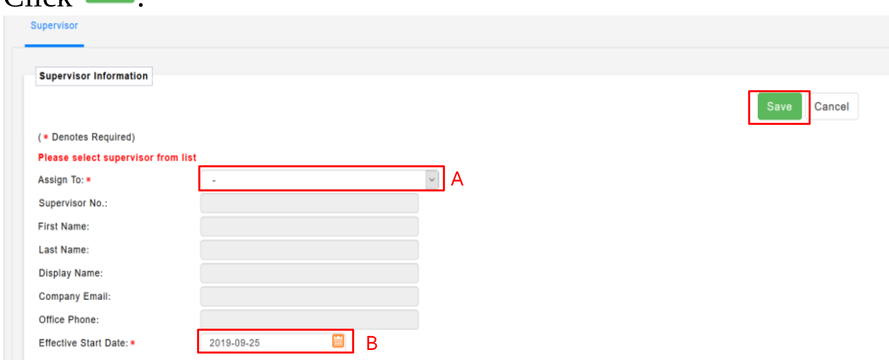
1. Go to Employee Profile → Employee Profile (Admin).
2. Select the employee in the list that you want to add supervisor.



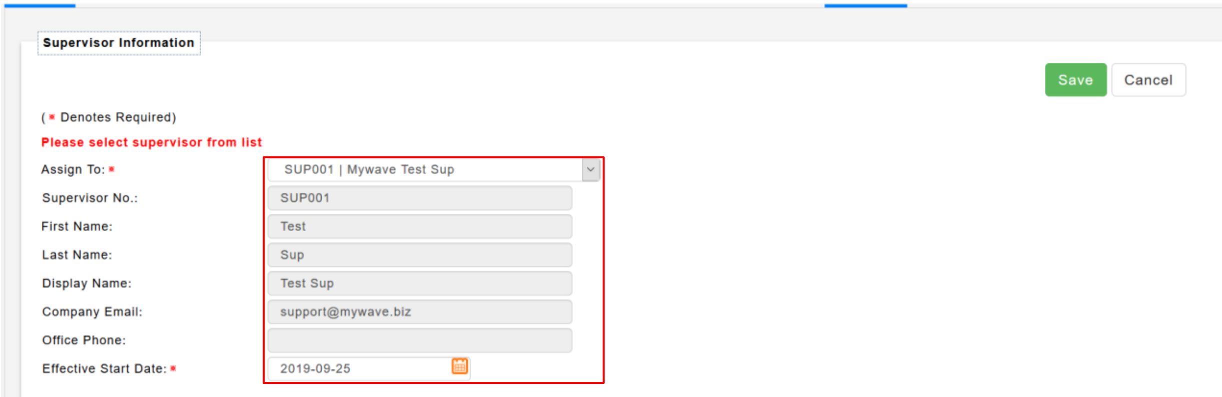
3. Select the tab [**Supervisor**].
4. Click Add .

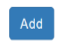


5. Select the supervisor (**A**) that you want to assign.
6. Fill in the Effective Start Date (**B**) when the supervisor starts effective.
7. Click Save.



8. Once you have selected the supervisor, it will auto show the supervisor information as screenshot below.

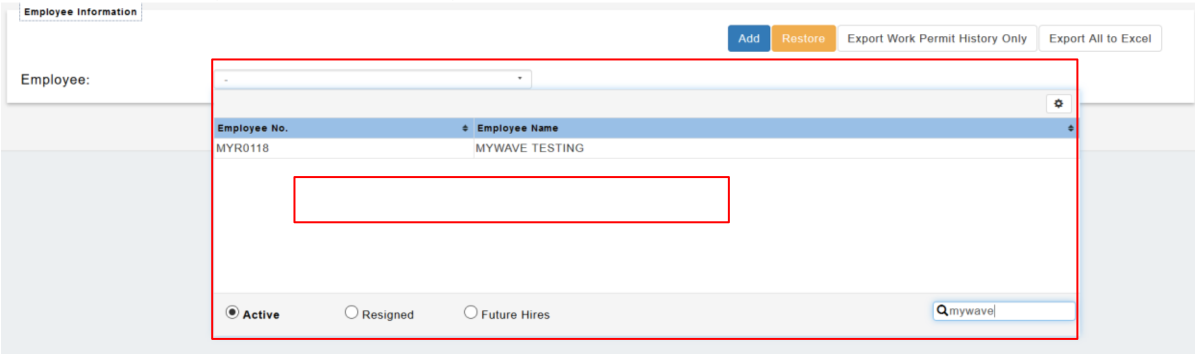


9. If the current supervisor was resigned, you also may use to 

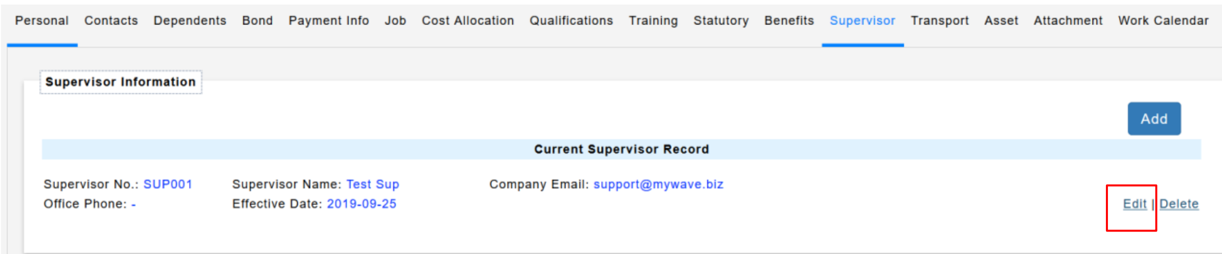
new supervisor.
10. If there is a future supervisor assign will show as screenshot below.

EDIT SUPERVISOR

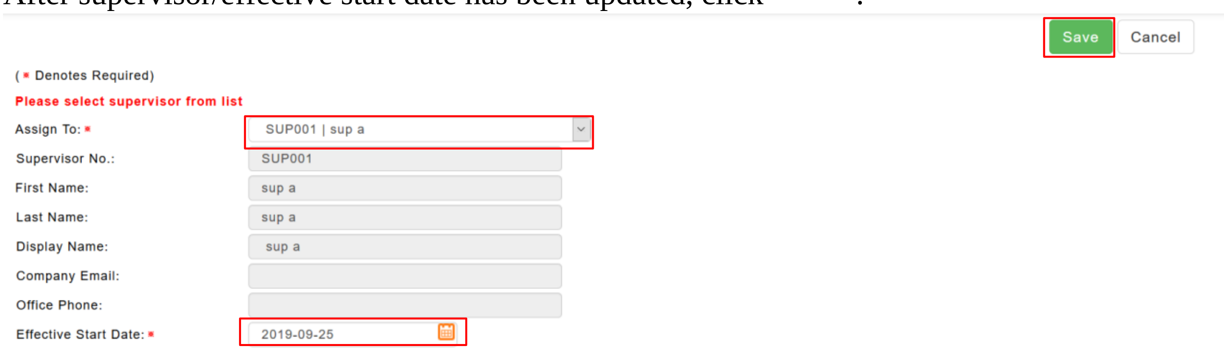
1. Go to Employee Profile → Employee Profile (Admin).
2. Select the employee in the list that you want to edit supervisor.



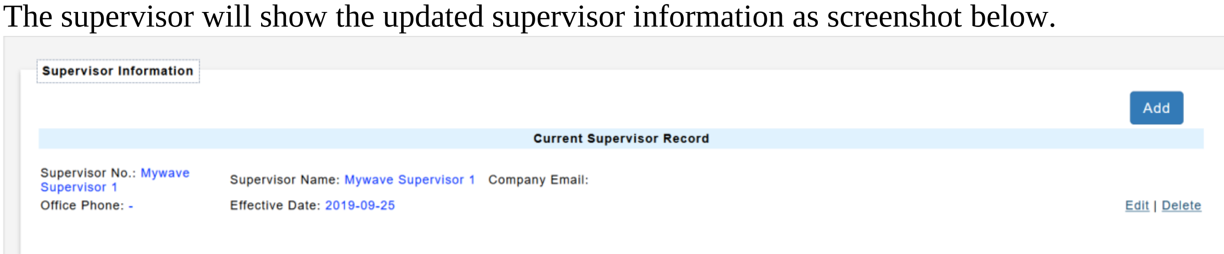
3. Select the tab [**Supevisor**].
4. Click Edit .



5. If there is wrongly supervisor/effective start date been assigned, just select again the supervisor and effective start date.
6. After supervisor/effective start date has been updated, click Save.

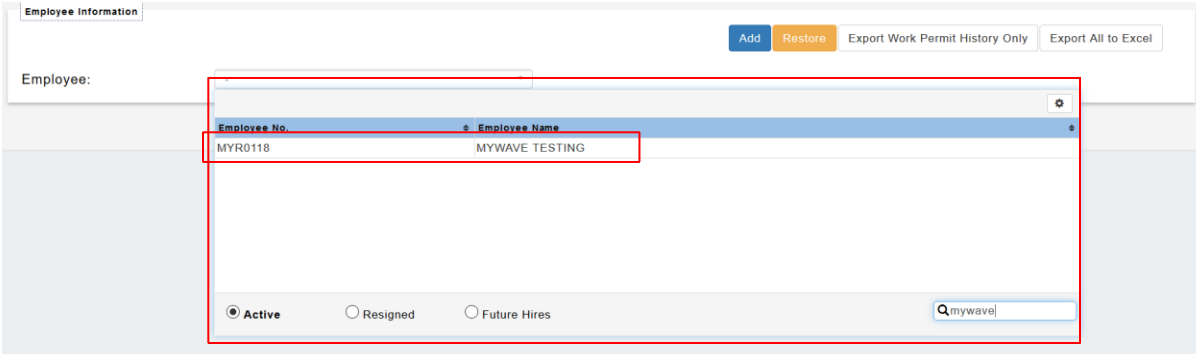


7. The supervisor will show the updated supervisor information as screenshot below.

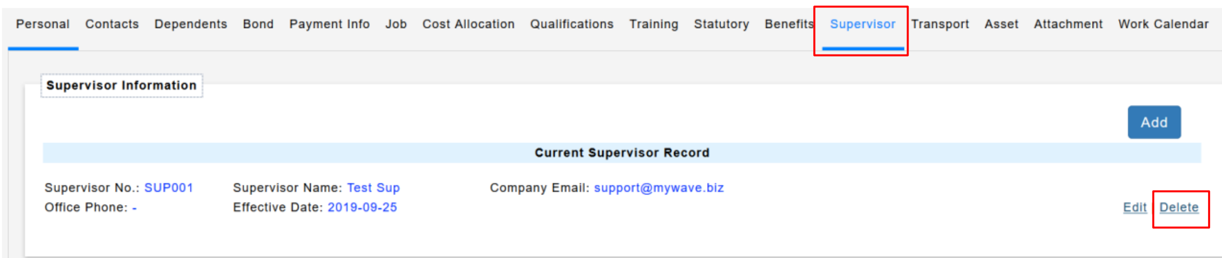


DELETE SUPERVISOR

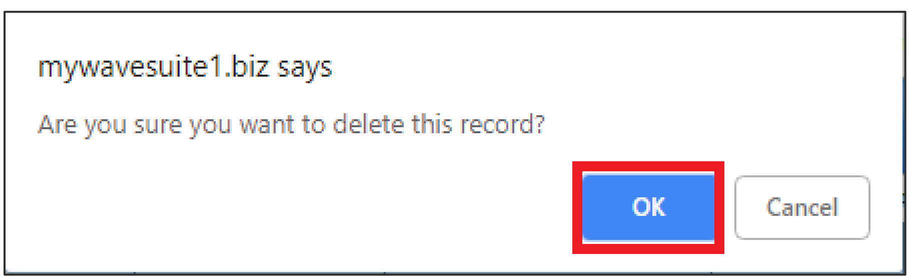
1. Go to Employee Profile → Employee Profile (Admin).
2. Select the employee in the list that you want to delete supervisor.



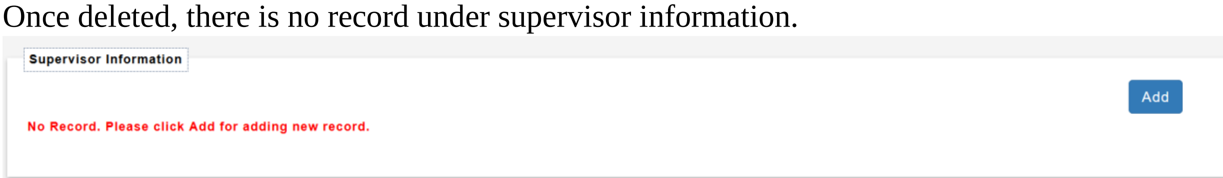
3. Select the tab [**Supervisor**].
4. Click Delete .



5. Once click delete it will prompt a message box as screenshot below.
6. Click OK to confirm delete.



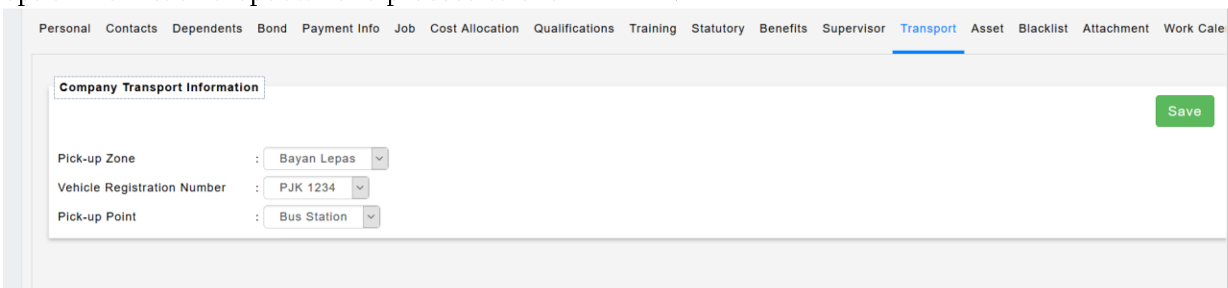
7. Once deleted, there is no record under supervisor information.



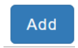
ADD TRANSPORT

1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **ADD** transport record.
2. Select the tab [Transport]
3. Admin will be greeted with a form use to assign transport information to employee. Select an option from each dropdown and proceed to click 

.

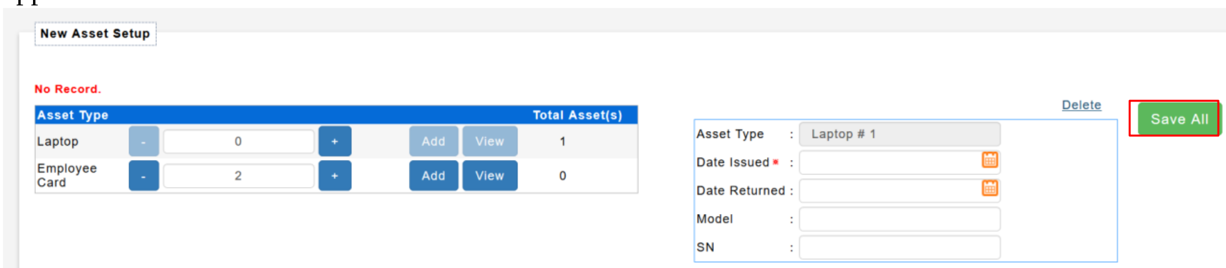


ADD ASSET

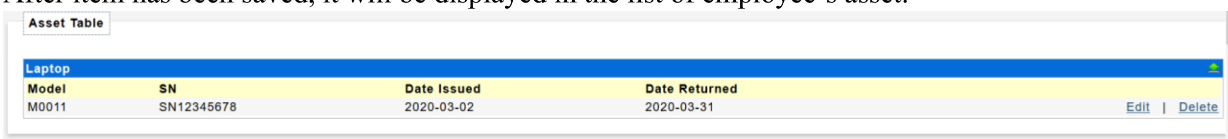
1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **ADD** asset record.
2. Select the tab [Asset]
3. Admin will be greeted with a list of assets that can be assign to employee. Insert the number of assets for a specified item and proceed by clicking 

to which a form of item details will appear. Insert the item details and click 

to save record.

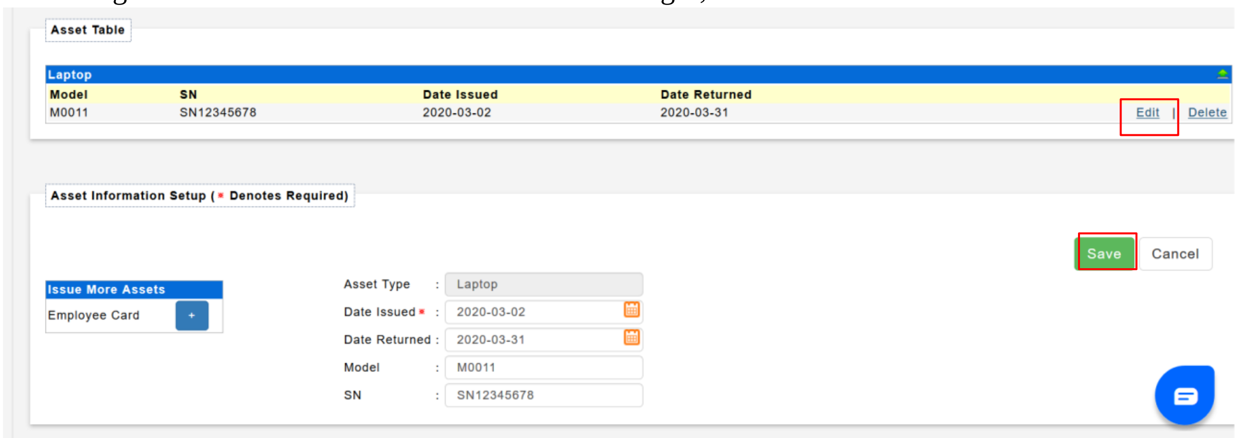


4. After item has been saved, it will be displayed in the list of employee's asset.



EDIT ASSET

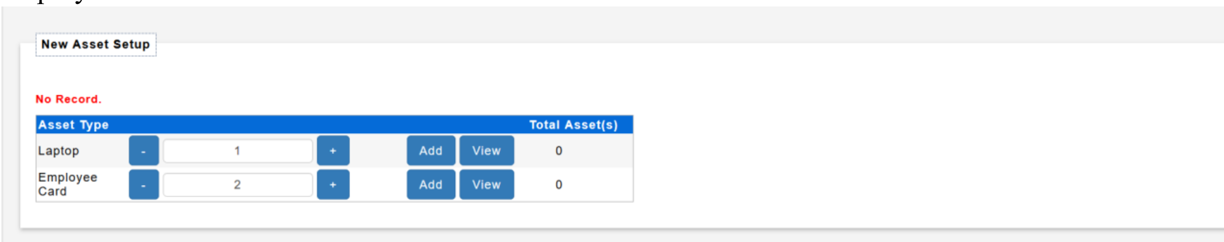
1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **EDIT** asset record.
2. Select the tab [Asset]
3. To edit the assert record, click on Edit and admin will be presented with the asset form containing the selected record. Once done with the changes, click on Save .



DELETE ASSET

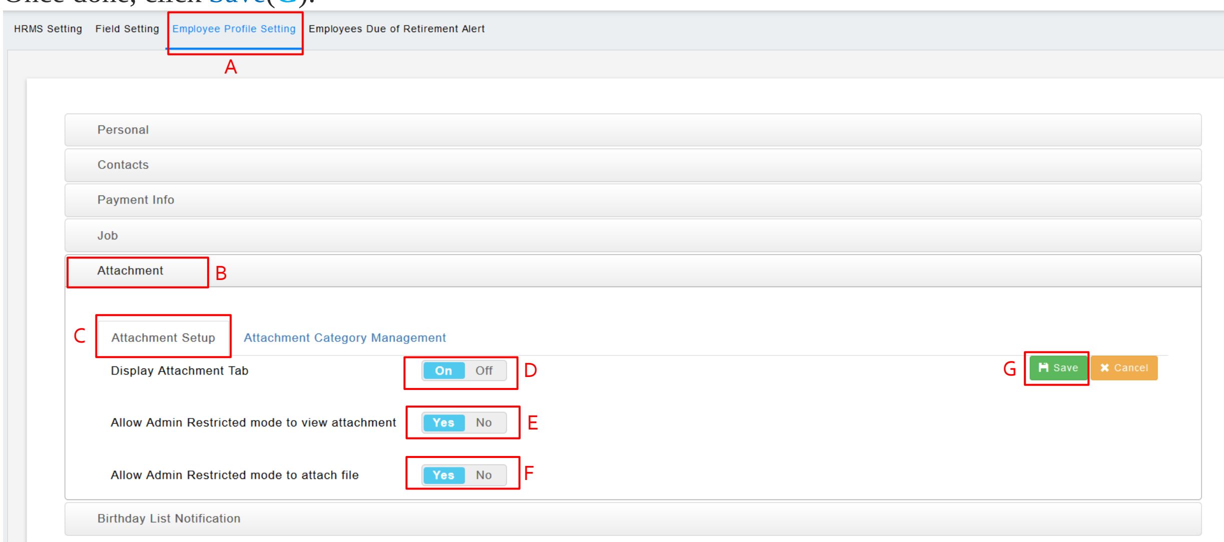
1. Go to Employee Profile → Administration → Employee Profile (Admin) → select the employee that you want to **DELETE** asset record.
2. Select the tab [Asset]
3. To delete the assert record, click on 

and the record will be removed from the list of employee's assets.

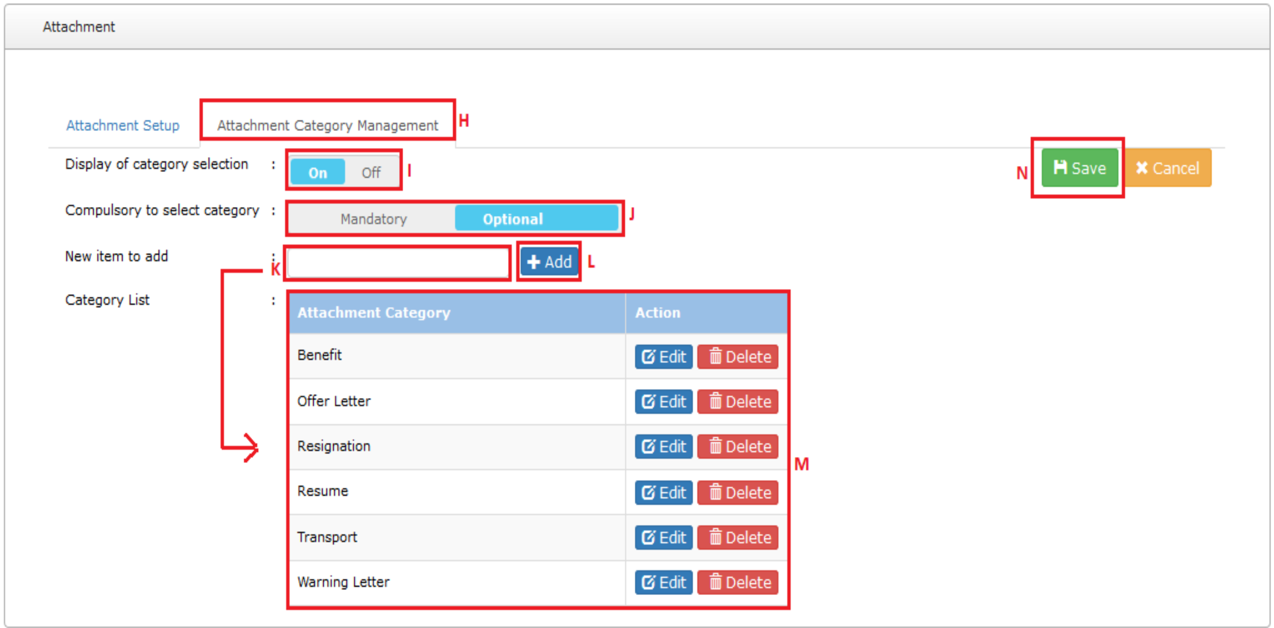


UPLOAD ATTACHMENT

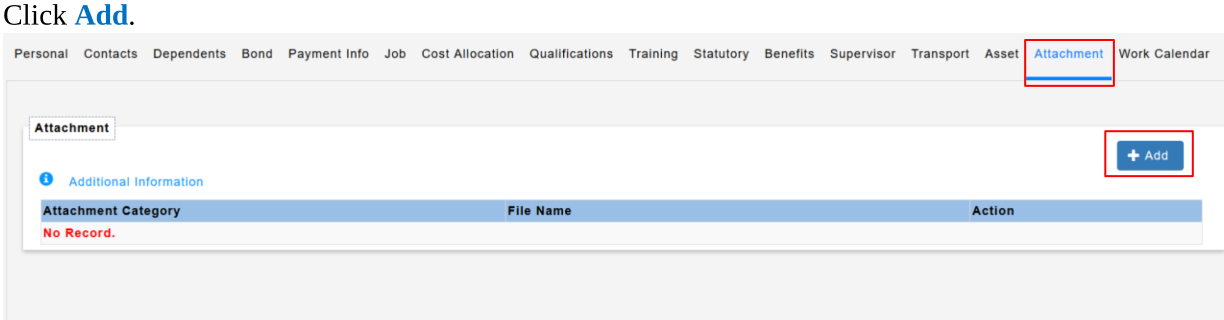
1. Go to Employee Profile -> Setup -> Settings.
2. Go to 3rd tab [Employee Profile Setting] -> click on tab [Attachment].
3. Under Attachment Setup (**C**) there is 3 setting.
4. Display Attachment Tab (**D**) set ON is to show the attachment tab in employee profile and OFF to hide the attachment tab.
5. Allow Admin Restricted mode to view attachment (**E**) set YES to allow the restricted admin to view the attachment.
6. Allow Admin Restricted mode to attach file(**F**) set YES to allow the restricted admin to attach file.
7. Once done, click Save(**G**).



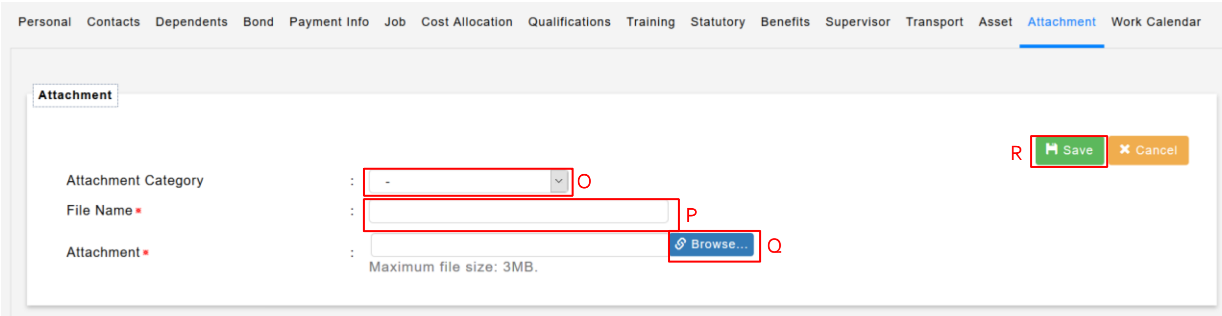
8. Click on the 2nd tab Attachment Category Management(**H**).
9. If you wish to display the category when attach file, click ON(**I**).
10. Set for the compulsory to select the category(**J**) when you attach the file.
11. Fill the category name(K).
12. Click Add(**L**) and it will show the category on below table(**M**).
13. The category added in the below table able to edit or delete.
14. Once done, click Save(**N**).



15. Under employee profile, will show a tab [**Attachment**].
16. Click **Add**.



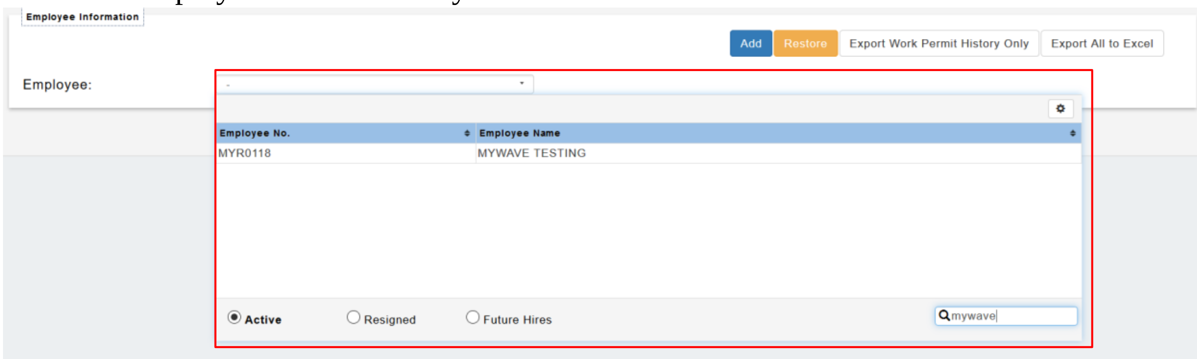
17. If you turn on the category selection, will show the Attachment category(O) and you may select.
18. Insert the File Name(P).
19. Click Browse(Q) to select the file that you want attached.
20. Once done, click Save(**R**).



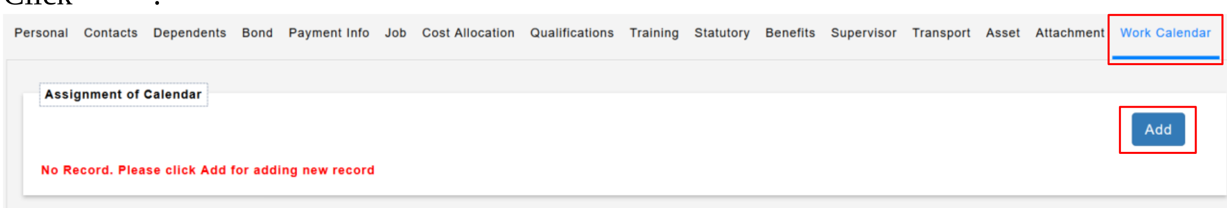
21. After save will show as screenshot(**S**) below.
22. Click the attach file(**T**) to view the file.
23. If you wish to edit or delete may click under action(**U**).
24. You still able to click add to upload another attachment.

ADD CALENDAR

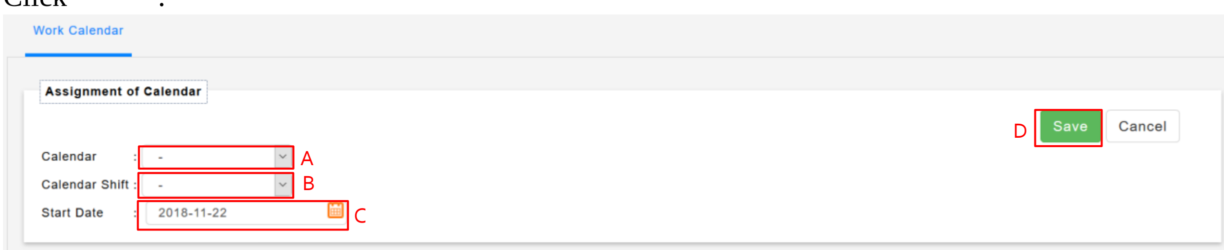
1. Go to Employee Profile → Employee Profile (Admin).
2. Select the employee in the list that you want to add calendar.



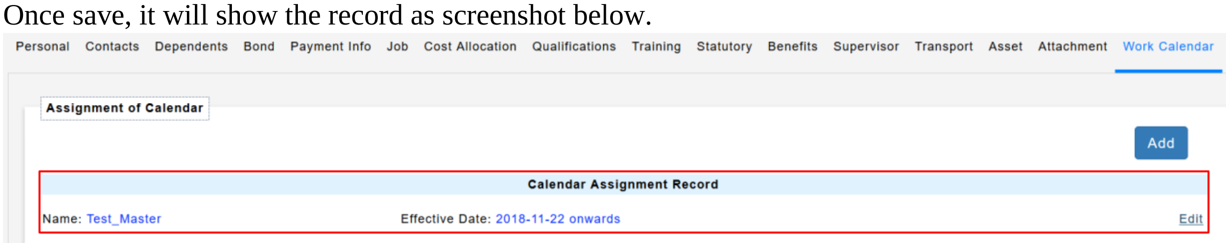
3. Select the tab [**Work Calendar**].
4. Click  .



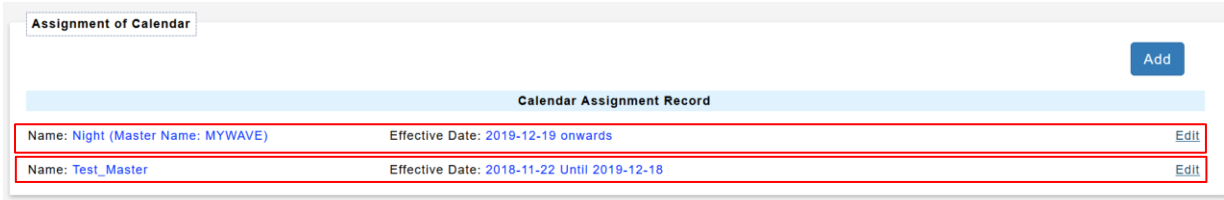
5. Select the calendar (**A**) that you want to assign.
6. Select the calendar shift (**B**) if any.
7. Select the Start date (**C**) for the calendar.
8. Click  .



9. Once save, it will show the record as screenshot below.

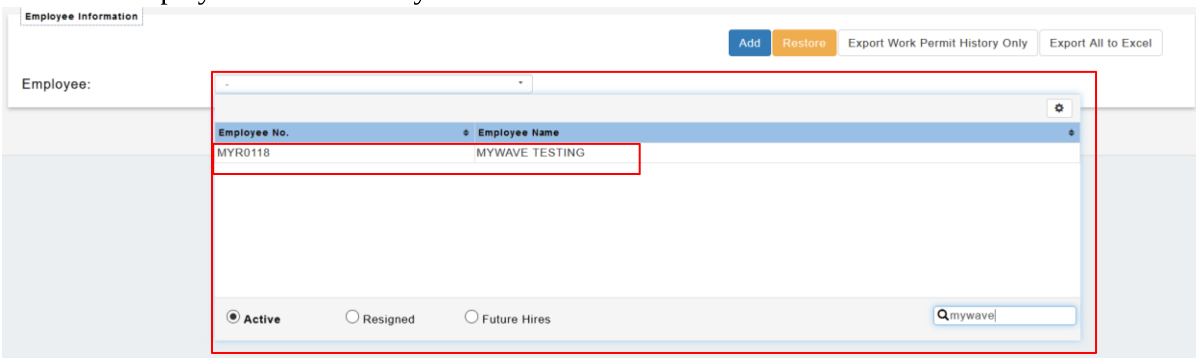


10. Once you have added again a new calendar, it will show 2 records as screenshot below.

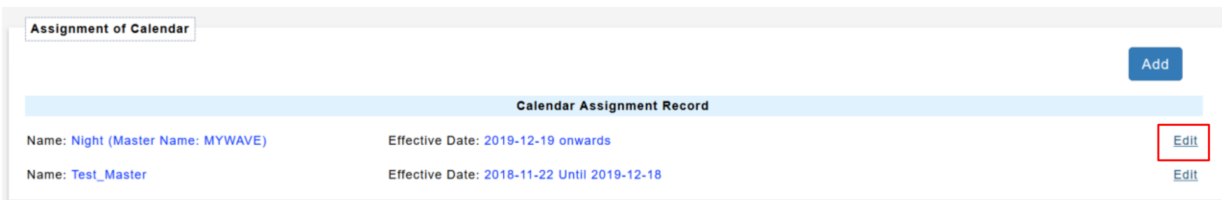


EDIT CALENDAR

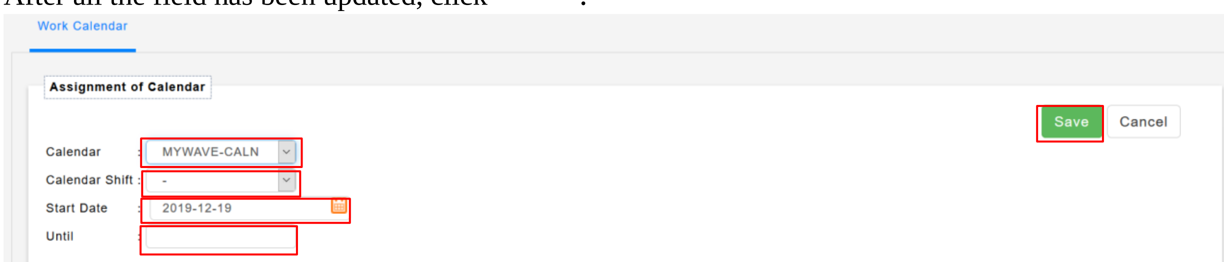
1. Go to Employee Profile → **Employee Profile (Admin)**
2. Select the employee in the list that you want to edit calendar.



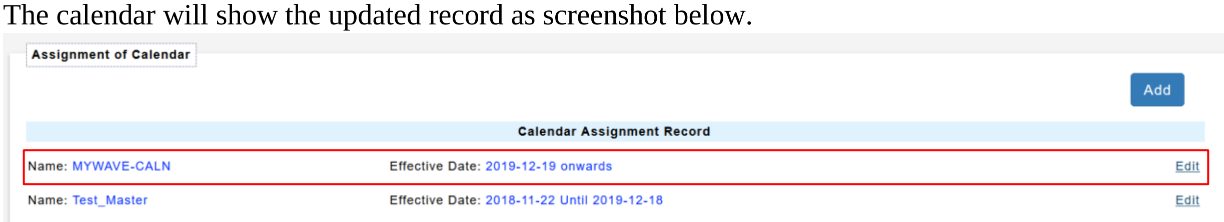
3. Select the tab [**Work Calendar**].
4. Click Edit.



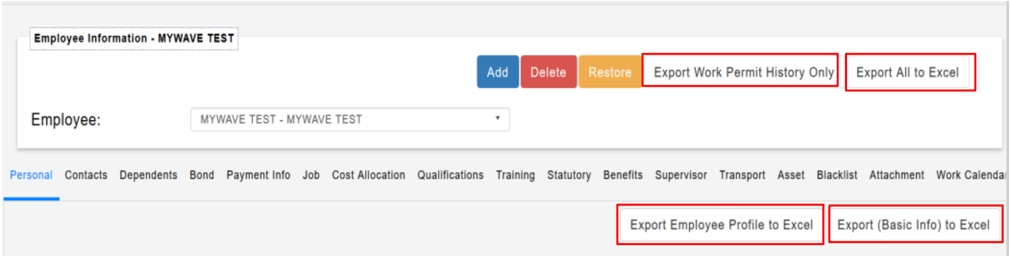
5. If there is wrongly Calendar/Calendar Shift/Start date been assigned and just select again the other Calendar/Calendar Shift/Start Date.
6. After all the field has been updated, click Save.



7. The calendar will show the updated record as screenshot below.



EMPLOYEE PROFILE REPORT



1. The following are a list of report which can be found and pulled in employee profile.
    a. Export Work Permit History Only
        i. A report containing all employee historical work permit, passport and visa information.
    b. Export All to Excel
        i. A report containing all employee information in employee profile.
    c. Export Employee Profile to Excel
        i. A report containing selected employee information in a table format.
    d. Export (Basic Info) to Excel
        i. A report containing basic information of selected employee in a table format.