

# HRMates Case Studies

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# Attendance Case Study

## Customer Profile

Its a real estate company with many employees on Field Duty

## Special Requirements

- Attendance Regularization Process with rules for number of working days allowed for regularization.
- If Employee Leaves after 8:30 in evening next day he can come 1 hour late. If leaves after 9:30 next day he can come 2 hours late.
- Attendance to be imported from bio-metric machines at multiple offices
- Some Employees do not need attendance monitoring, some need monitoring but penalty rules not applicable.

## Solution

- Attendance Regularization process was setup with approval workflow.
- Attendance Penalty Rule Custom Process was modified to update shift timings of next day on Late Going.
- Attendance Import Process was setup for multi locations. Auto Warning Emails generated for following cases
  - Monitored Employee in HRMates Database not available in Punch Machine
  - Attendance not coming from a location for a full day
- Special Attendance Grades were set up in Employment Profile and used in Attendance Process

## Change Management

- After First Round Implementation several changes were requested by clients and most changes were addressed within 1 working day

# Service Oriented Organization

## Customer Profile

The organization has Head Office and more than 30 branch offices across india. Company deals with Medical Sample Collection. All HR and Payroll are managed from Head Office.

## Special Requirements

- Need flexible week off for Phlebologist.
- Leave Entitlement and Holidays are assigned as per policy of the State in which the office is located. IT Team has 5 days working, Operations team has 6 days working with 3 Shifts, rest of the organization has 6 days working.
- Rosters are created by Team Manager and Approved by Head of Operations. During Roster creation HRMates provides visibility for leaves applied by Roster Employees. Once Roster is approved the employees can see there roster schedule using My Roster.
- Further Employees can apply for Shift Exchange. Shift Exchange is approved by exchange Employee's Team Manager and HOD. After approval the Updated Roster is visible in My Roster.
- Electronic Acceptance of Employment Terms and Conditions
- Contract Workers Invoicing
- Contract Workers Employee Code has different Prefix

## Solution

- Attendance and Salary were grouped by Locations
- Created Flexible Week off policy as per requirement
- Roster Module was setup for the company along with approval rules
- Terms and Conditions feature was setup for the company along with requirement for new employees to download documents and upload a signed copy, further approved by HR.

## Change Management

- If a Employee or Manager location or area of operations are changed it is automatically reflected in the system as system as been setup based on Rules and Organization Structure.
- If a uploader leaves organization, system will force a replacement.
- Any Other Change can be easy be accomplished in the calculator logic.

## Future Roadmap

Auto run Data Import Process to pull Sales Data automatically from Sales System. This will be done after the Sales System is ready with API for Data Export.

# PMS Case Study

## Customer Profile

A Steel Company in Jamshedpur, with offices across india.

## Special Requirement

- Company has a ready Paper/Excel based Performance Management System.
- Company wants to automate the same system with some changes
- There will be 3 PMS Types. HODs, Officers and Associates
- Goals will be set by Appraisee and Approved by Reporting Manager and HOD in beginning of Year
- During course of Year Additional Assignments and Special Achievements can be added to PMS Form
- End of Year Appraisal is done with involvement of Employee, Reporting Manager, HOD and Management

## Prior System

- Paper and Excel Based

## Deficiencies in Prior System

- Lot of Paperwork
- Need Lot of Monitoring

## HRMates Solution

- HRMates PMS was setup with 3 Templates.
- Rules to map Templates with Employees were created
- Beginning of Year Goal Setting Activity was kicked off
- Notifications and daily reminders were generated for Goal Setting
- During the Year HR Managed Additional Assignments and Special Achievements
- Appraisal Activity Kicked off at end of financial year.
- HR Generated Talent Review Forms after end of Appraisal Activity
- Management used Talent Review Form for Promotions and Increments

# Employee Data Case Study

## Customer Profile

Mobile Retailer with stores across North India.

## Special Requirements

Sales System Generates Sales Data for Every Sales Employee on daily basis. Requirement is

- Publish Sales Data to Employee Portal on Monthly Basis
- Can view Summary and if needed view details
- Store Managers can view their own sales Data and of Store Employees
- Area Manager can view Sales Data for all stores under him
- Sales data for Employees, Store Managers and Area Managers should be presented in their Performance appraisal form
- Incentive generated from Sales Data and added to Employee Salary
- Reminder System to be able to upload data on monthly basis to portal

## Prior System

- Data is pulled from Sales System as Excel Sheets
- Calculations are run on excel sheets

## Deficiencies in Prior System

- Employees were not able to see their performance data
- Lot of manual work and possibility of errors

## HRMates Solution

- Existing Employees Data was imported in HRMates
- HRMates Employee Data Module was setup to create Employee Data Upload Process for 4 kinds of Sales Data Sheets.
- Responsible HR People are assigned to Upload Process for uploading on monthly basis.
- HRMates generates a Notification (on Email and Dashboard) every month
- Uploader uses Notification to upload the Data Sheets
- HRMates generates summary sheet for uploads
- Employees and Managers see the summary sheet along with button to see the details
- PMS Form is setup with columns for Sales Achievement. The Column is bound to have Uploaded Sales data using PMS calculator
- Payroll is setup with Sales Incentive Column
- Sales Incentive Column is bound to have Uploaded Sales Data using Salary Calculator

# Multi Country Organization with variations in Policies across Geographies

## Customer Profile

Is a global IT services provider with over 2,200 employees delivering technology services from our delivery centres spread across South East Asia and helping our clients improve business competitiveness, efficiency and ROI.

## Special Requirements

A HRIS Solution which besides providing regular HR functions should be able to incorporate HR and Payroll policies for our offices in different countries. Further several teams are spread across countries with reporting structure across countries. System should allow managers to perform HR Function across countries.

## Solution

HRMates instances were created for each country. The instances were grouped in Organization allowing cross reporting.