## **Team-wise Shift Module Works in Large-Scale Companies**

### **🎯 Objective**

To manage **different shifts for individual employees within the same team**, ensuring smooth operations, avoiding conflicts, and maintaining proper resource availability across time zones and workloads.

### **⚙️ 1. Shift Definition**

* The HR or Admin creates multiple shift types in the HRMS system:  
  + **General Shift:** 9:00 AM – 6:00 PM
  + **Morning Shift:** 6:00 AM – 2:00 PM
  + **Evening Shift:** 2:00 PM – 10:00 PM
  + **Night Shift:** 10:00 PM – 6:00 AM
* Each shift is defined with attributes like:  
  + Shift name/code
  + Start and end time
  + Weekly offs
  + Shift allowances (if applicable)

### **👥 2. Team Structure Mapping**

* Teams are created in the HRMS software (e.g., Development Team, QA Team, Customer Support Team).
* Each team has:  
  + A **team manager** or supervisor
  + Assigned **team members** from various roles
  + **Shift permissions** based on team workload or client demand

### **📅 3. Employee-wise Shift Assignment (within the team)**

* **HR/Admin/Team Manager** assigns shifts at the **individual employee level** even within the same team.  
  + Example:  
    - Employee A (Dev Team) → General Shift
    - Employee B (Dev Team) → Morning Shift
* Assignment can be done:  
  + **Manually (one-by-one)**
  + **Bulk upload via Excel**
  + **Auto-rotation rule** (if enabled)
* The Shift Calendar allows managers to **view and edit shifts** for each employee.

### **🔄 4. Rotational or Dynamic Shifts**

* For certain teams (like IT Support or BPO), **rotational shift rules** can be configured:  
  + Employee A: General this week → Night next week
  + Employee B: Morning this week → General next week
* Rotations can be:  
  + Weekly
  + Monthly
  + Based on project needs

### **📲 5. Shift Visibility**

* Each employee sees their assigned shift on:  
  + Web portal
  + Mobile app
  + Daily shift email/SMS notifications
* Managers can view full **team-wise shift rosters**.

### **🕒 6. Attendance Integration**

* Shift timings are tied to attendance:  
  + System checks if employee clocked in/out as per assigned shift
  + Late marks, early logout, and overtime are calculated **based on the shift**
* Even if team members have different shifts, the system validates attendance **relative to the individual shift schedule**

### **📢 7. Notifications & Approvals**

* Employees get notified of:  
  + Shift assignments
  + Shift changes
  + Shift swap approvals (if allowed)
* Shift change/swap requests go to the team manager for approval.

### **📊 8. Reporting & Audit Trail**

* HRMS generates:  
  + **Team-wise shift utilization**
  + Individual adherence to assigned shifts
  + Shift vs productivity analysis
* All shift assignments and changes are **logged for audit purposes**

### **✅ Example Use Case: Development Team**

| **Employee** | **Team** | **Assigned Shift** | **Notes** |
| --- | --- | --- | --- |
| A | Dev Team | General | Working with core dev team |
| B | Dev Team | Morning | Working on testing |
| C | Dev Team | Night | Handling US client tasks |

* Each team member’s shift is respected by the attendance and payroll modules.
* The manager can monitor productivity per shift and rebalance as needed.

### **🔐 Access Control**

* Only HR/Admin or authorized **team managers** can assign or change shifts.
* Employees can view their own shift but cannot change others' unless shift swap is enabled.

## **Detailed Scope of the Team Creation Feature in HRMS**

### **✅ 1. Access Control & Permissions**

* **Who Can Create Teams?**
  + HR Admins
  + Department Heads
  + Managers (with elevated permissions)

### **✅ 2. Team Creation Form / Interface**

* A user-friendly interface to **add a new team** with the following fields:

| **Field** | **Description** |
| --- | --- |
| **Team Name** | Unique name (e.g., Sales Zone A, DevOps Night Shift) |
| **Department** | Link the team to an existing department |
| **Team Code (optional)** | For internal tracking or integration |
| **Team Manager / Lead** | Assign one or more team heads |
| **Location/Branch** | Useful for multi-location companies |
| **Shift Preference** | Default shift associated (optional) |
| **Team Type** | Permanent, Project-Based, or Temporary |

### **✅ 3. Employee Assignment**

* **Add Members to the Team** directly while creating or editing:  
  + Search employees by name, ID, department, or designation.
  + Allow bulk assignment (CSV upload or checkbox selection).
  + Show only **unassigned** or **available employees** (optional filter).
* Employees can be:  
  + Assigned to one primary team
  + Added to multiple teams (with warnings if overlaps exist)

### **✅ 4. Validation & Constraints**

* **Unique Team Name & Code**
* Prevent the same employee from being a manager in two teams (optional).
* Limit the number of members if required by policy (e.g., 20 max/team).
* Notify if employee already belongs to another project-critical team.

### **✅ 5. Team Settings Options**

* Shift Rotation (Enable/Disable for this team)
* Performance Review Enabled (Y/N)
* Use Team for Attendance/Leave Grouping
* Assign Default Reporting Manager (for leave/workflow)

### **✅ 6. Team Dashboard / Summary View**

Once the team is created:

* Overview of team members
* Attendance summary
* Active tasks (if integrated)
* Team calendar (shifts, leaves, events)
* Edit / Remove / Archive the team
* Export team list (PDF/Excel)

### **✅ 7. Notifications**

* Notify:  
  + Assigned team manager(s)
  + Team members (optional)
* Notification methods:  
  + Email
  + SMS
  + In-app notification

### **✅ 8. Audit Trail**

* Track:  
  + Who created the team
  + Any additions/removals of members
  + Date/time of changes
* Important for compliance and HR audits

### **✅ 9. Integration Points**

* **Shift Management**: Auto-assign team shifts if configured
* **Leave Management**: Filter leave calendars by team
* **Payroll**: Apply team-level bonuses or incentives
* **Performance Management**: Allow team-based evaluation

## **👨‍💻 Example Workflow:**

1. **HR Admin clicks “Create Team”**
2. Fills form → Selects department, team name, and shift
3. Adds employees from the same department
4. Assigns a manager
5. Submits → Team created and appears in the Team Directory
6. Manager gets notification and access to team tools

**Payroll Generation**

The **Payroll Generation**, **Salary Structure Setup**, and **Monthly Salary Processing** features are essential components of a Human Resource Management System (HRMS). Below is a detailed explanation of how each of these features should ideally function, especially in medium to large-scale organizations.

## **💰 1. Add Salary Structure**

### **📌 Purpose:**

To define how an employee’s salary is broken down (e.g., basic, HRA, bonuses, PF, etc.).

### **🔧 Workflow:**

1. **Admin/HR creates a salary template**:  
   * Name: "General Staff", "Executive Level", etc.
   * Define fixed and variable components:

| **Component** | **Type** | **Value Type** | **Example Value** |
| --- | --- | --- | --- |
| Basic Salary | Fixed | % of CTC | 40% |
| HRA | Fixed | % of Basic | 40% |
| Special Allowance | Fixed | Amount | ₹3,000 |
| Bonus | Variable | On Performance | (Based on rules) |
| Provident Fund | Deduction | % of Basic | 12% |
| Professional Tax | Deduction | Fixed | ₹200 |

1. **Assign the salary structure** to:  
   * Departments
   * Employee roles
   * Individual employees
2. **Edit or clone structures** if any changes are needed for specific employees.

## **📅 2. Monthly Payroll Generation**

### **📌 Purpose:**

To calculate the total earnings and deductions for each employee for a given month.

### **🔄 Workflow:**

1. **Pull Attendance Data** (integrated with the attendance module):  
   * Days worked
   * Leave deductions (LOP - Loss of Pay)
   * Paid leaves
   * Overtime (if applicable)
2. **Calculate Earnings**:  
   * Based on working days and salary structure
   * Include any applicable **bonuses**, **incentives**, or **arrears**
3. **Calculate Deductions**:  
   * PF
   * ESI
   * Professional Tax
   * TDS (Tax Deducted at Source)
   * Loan EMIs or salary advances (if any)
4. **Generate Pay Slip for Each Employee**:  
   * Show earnings, deductions, and net salary
   * Downloadable or email-distributed
5. **Review & Approval**:  
   * HR/Admin reviews payroll summary
   * The finance or authorized manager approves
6. **Lock Payroll**:  
   * Once approved, payroll is locked for the month
   * Can be unlocked only by the admin for edits
7. **Salary Disbursement**:  
   * Integration with bank APIs or download of the **bank transfer sheet**
   * Option to generate salary payment file (Excel/CSV for NEFT)

## **🧾 3. Payslip Generation**

* Available to employees from their portal
* Contains:  
  + Employee details (name, ID, PAN)
  + Salary components
  + Attendance summary
  + Bank details
  + Company branding and signature

## **📊 4. Reports & Export**

* Payroll Summary Report
* Department-wise salary expense
* Statutory reports: PF, ESI, TDS
* Export formats: Excel, PDF, JSON

## **🔐 5. Security & Access**

* Only HR/Finance/Admin can run payroll
* Employees can only view their own payslips
* Role-based access to salary edit rights

## **🧩 6. Optional Integrations**

* **Accounting Software** (e.g., Tally, QuickBooks)
* **Government Portals** (EPFO, Income Tax)
* **Bank APIs** for direct salary transfer

## **🧠 Example Scenario:**

1. HR creates a salary structure "Executive Level" with ₹50,000 CTC.
2. Assign it to 20 new employees in the Sales Department.
3. On 2the 8th of the month, HR runs payroll:  
   * Pulls attendance
   * 2 employees had 2 LOP days → deductions applied
4. HR reviews, approves, and exports the payment sheet
5. Payslips are auto-generated and sent to employees