How to Set Up Your **uKnowva HRMS** (Lite version) Portal?

Our DIY manual enables HR professionals and system admins to easily set up their uKnowva instance from scratch, covering company info, data fields & masters, leave and attendance policies, payroll, projects, offboarding, and other policies. It ensures self-reliance with clear guidance for configuring and benchmarking workplace norms.

DIY Set Up Manual

Welcome to the DIY Set Up manual for uKnowva HRMS! This guide is tailored for users embarking on the journey of configuring their uKnowva HRMS instance.

Whether you're a small business owner, HR professional, or system administrator, this manual equips you with step-by-step instructions to effortlessly set up your HRMS platform.

From establishing company information to defining roles, managing leaves, processing payroll, and implementing company policies, each section is meticulously crafted to ensure a seamless setup experience.

Get ready to harness the full potential of uKnowva HRMS and streamline your HR processes with ease.

Let's dive in!

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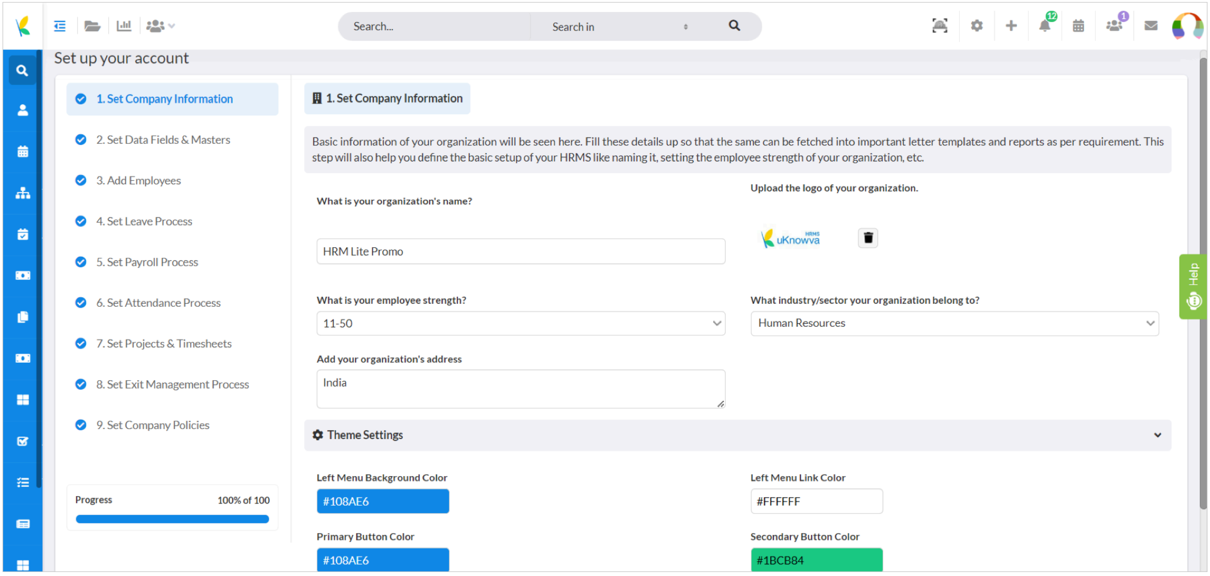
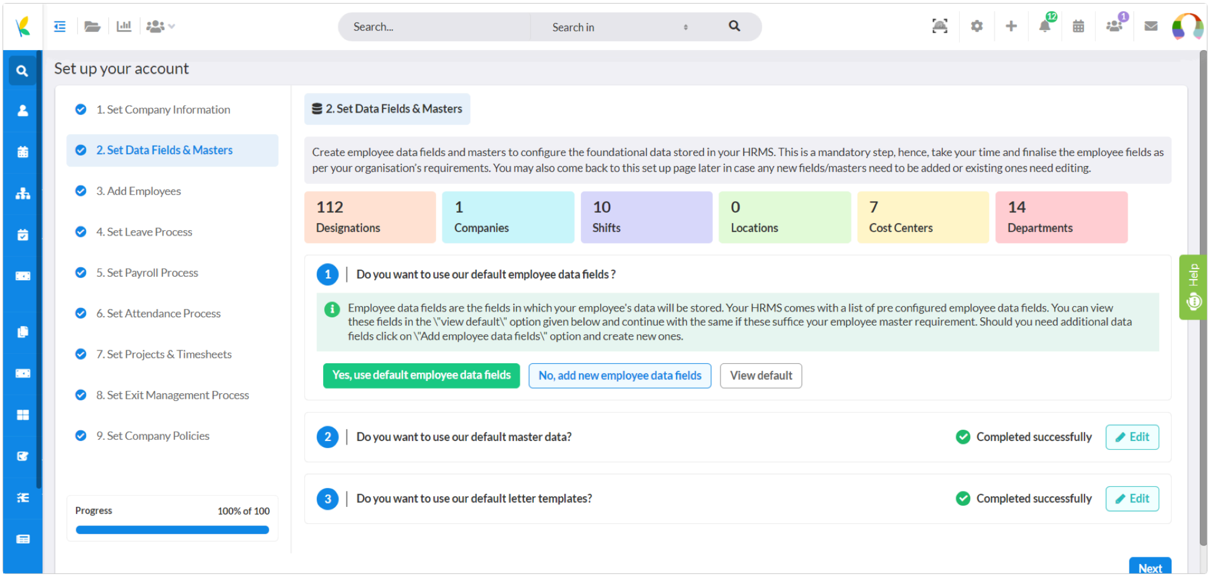
1. Setting Up Company Information



Add basic organisation information related to its **name, employee strength/count, full postal address, industry, logo,** etc.

Click on the **Theme Settings** section to change the background colour and theme of your instance. Once you're done, click **Next**.

2. Setting Data Fields & Masters



Create and set up data fields and masters in this step. Fetch insights at the same time on the **existing companies, shifts, locations, cost centers** etc., at the first glance before proceeding with this step.

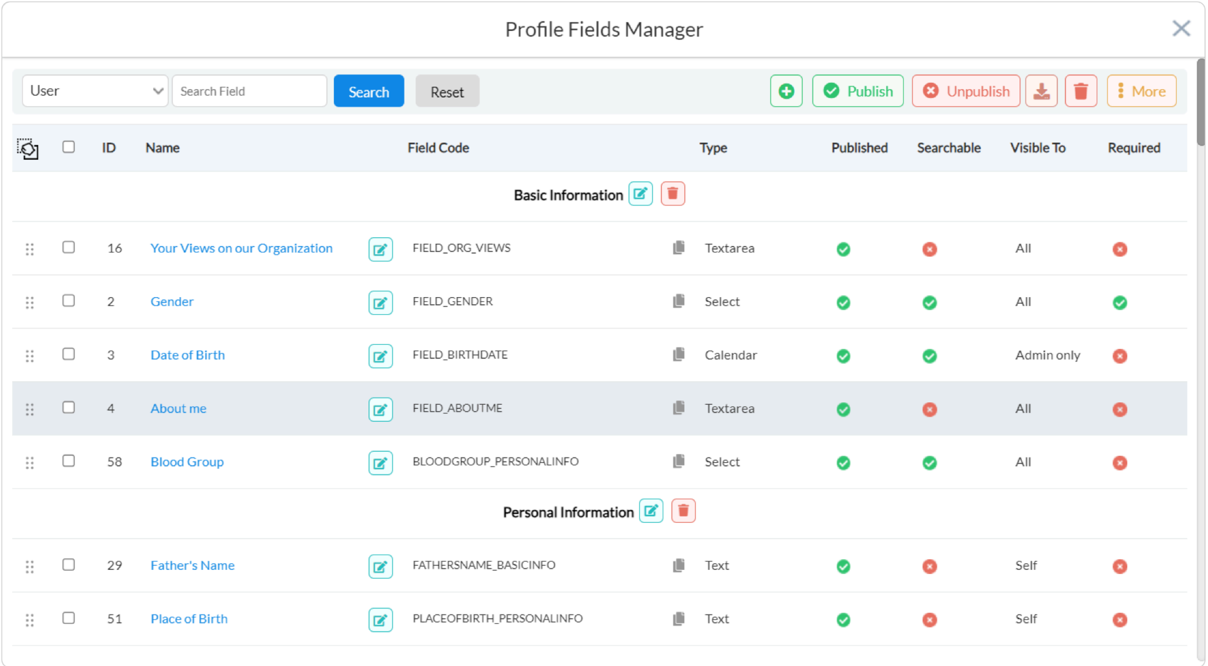
2.1 Employee Data Fields

The first component asks you to finalise the **employee data fields** for choosing the right field to store employee information.

Click the **default settings, add new employee fields, or view the default settings first.**

After clicking view the default settings, a new window pops up with **Profile Fields Manager** details.

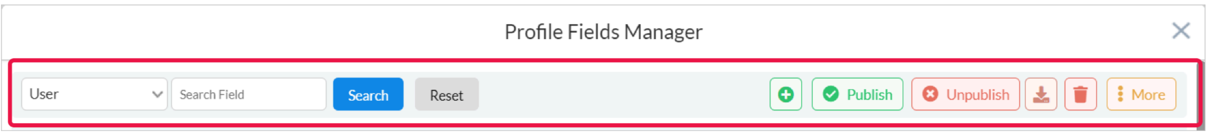
It includes all fields of employee information like **basic information, personal information, contact information, education information,** etc., which you can delete or configure. Choose the **pen** icon in front of each field to edit its details or the **dustbin** icon to delete it permanently.



At the top of this page, you have multiple buttons for more operations. Click the **"+"** symbol to add a new profile field for your employee. Click the **Publish** button after selecting multiple profile fields from the list below to publish those simultaneously.

Click the **Unpublish** button after selecting multiple profile fields from the list below to unpublish them instead of deleting these fields forever.

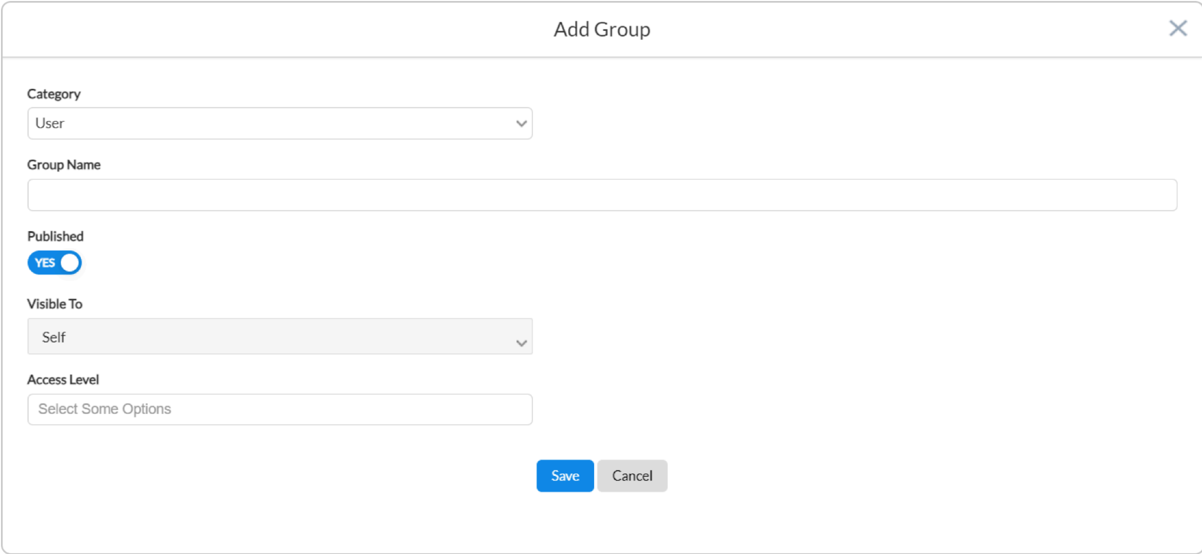
Click the **download arrow** button for downloading the current fields' data in an Excel file on your system. Select multiple profile fields and then click the **dustbin** button next to this download arrow button at the top. This will let you delete the chosen profile fields at once.



Click the **three dots** at the top right corner button to **add a new group** first before adding new fields. This group is for creating another data field in the employee database to collect any required information as per the organisation's policy.

While adding a new group, you can mention details, like:

- Category
- Group name
- Whether to publish it
- Visible to



Close the add group window and go back to Profile Fields Manager by clicking the **view default** button.

There you have a **search bar** in the top left corner to search the groups or profile fields on the basis of user, timesheet, assets, company information, client information, etc. Once you're done selecting the user, write the fields you want to search and filter.

Then click **Search** for the finalised and filtered page view. Click **Reset** to return to the original page view.

Now close this pop-up window and go to the second component of the page.

2.2 Master Data

It asks you to **create or set up required master data sets.**

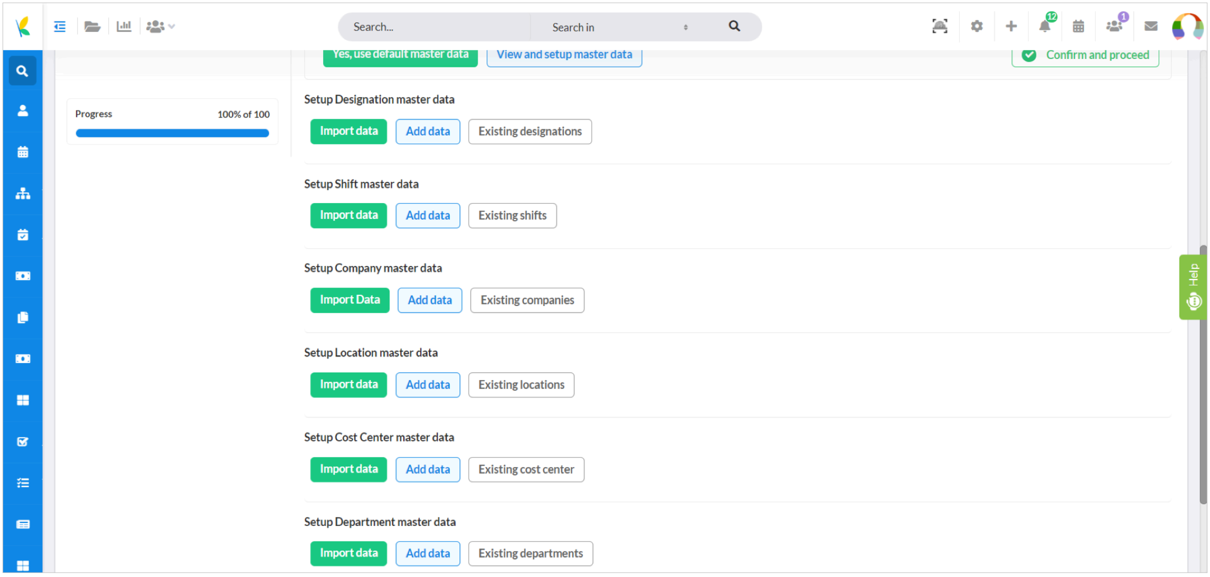
Some of the pre-configured master data sets include:

- Designation master
- Shift master
- Department master
- Company master
- Cost center master

Click the **user default master settings** or **view and set up another master data.**

When you click on the view and set up another master data button, a series of new buttons appear to set the pre-configured masters.

You get 3 options for each master, including **import data, add data, and viewing existing data** be it designations, shifts, companies, locations, etc.

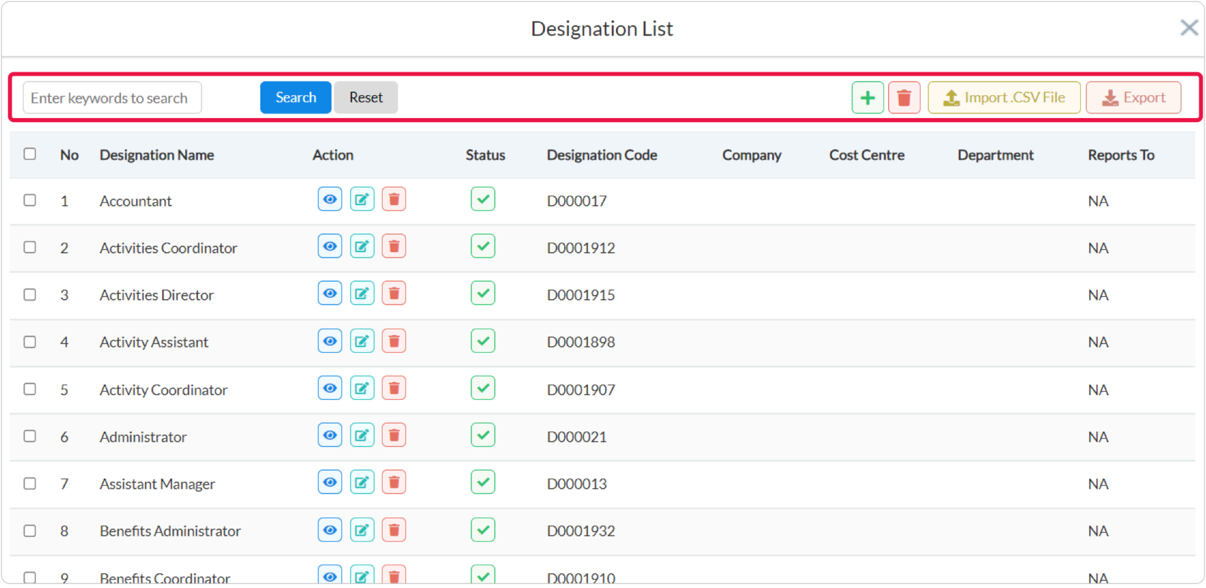


Click on **Import** data of each field to add the CSV file of that master's data you want to import to the system. Click on **Add Data** to add the data of each master either manually or with the help of AI tools like AI Suggest in the case of adding the **Designation** data. Once you're adding the data manually or automatically, click on **Save**. Otherwise, click **Cancel** and start again.

Click on **Existing** data for each master to view the existing information in the new pop-up window that appears. At the top right corner of this window, find the **Import, Export,** and **Add** buttons. Use the **Import** button to add data there through the CSV file. Click on **Export** to download its Excel file and click on the **+ or Add** button to add the data manually there.

Once you're done adding the data, click on **Save** or **Cancel** if you want to restart to edit the existing details.

Find the **search bar** there to filter the page view by entering certain keywords or key phrases. Once done, click **Search**. Otherwise, go back to the default page view by clicking **Reset**.



Designation List

Enter keywords to search | Search | Reset | Import .CSV File | Export

	No	Designation Name	Action	Status	Designation Code	Company	Cost Centre	Department	Reports To
	1	Accountant			D000017				NA
	2	Activities Coordinator			D0001912				NA
	3	Activities Director			D0001915				NA
	4	Activity Assistant			D0001898				NA
	5	Activity Coordinator			D0001907				NA
	6	Administrator			D000021				NA
	7	Assistant Manager			D000013				NA
	8	Benefits Administrator			D0001932				NA
	9	Benefits Coordinator			D0001910				NA

Now close the pop-up window and go back to the page for the third component.

2.3 Letter Templates

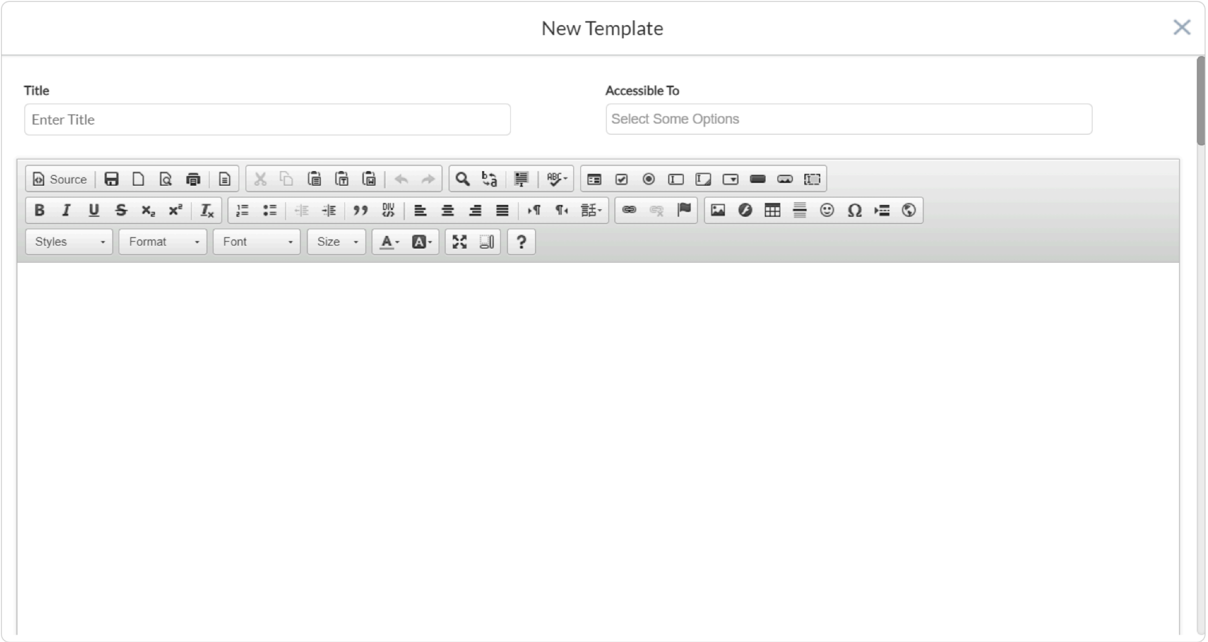
It asks you to **create/set up letter templates.**

For templatising and saving various letters, either choose and click **"Use default letters,"** if you do not want any changes in the current templates.

Click on **"Add new letters,"** and a new pop-up window shall appear.

Add a **Title of the letter** here along with the **Accessible to** option to make it accessible to the concerned person. The text editor below lets you add the content along with the tags to make the letter dynamic for every job role or profile.

Once you're done adding the content, click **Save**. Otherwise, select **Cancel** and start again.

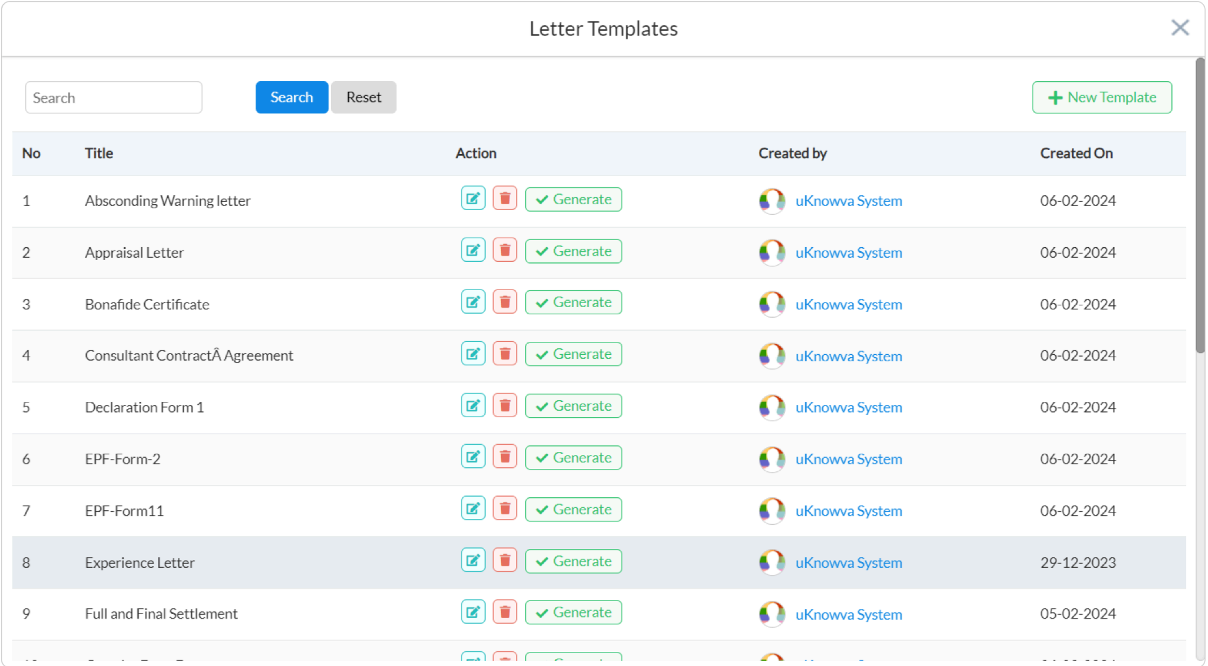


Now close this pop-up window and click **"View default settings."** A new window that appears shows you the list of all the existing letters stored in the HRMS on behalf of your organisation.

Click on the **pen** icon or symbol to edit the letter there. Click on the **dustbin** button to delete the letter. Click on the **Generate** button to get a PDF version of the letter to your system.

On the top right corner of this page, you get an option of **New Template.** This is another way of creating a new letter.

Otherwise, this page also has a **search bar** where you can enter keywords or key phrases that help you filter the page after you click **Search**. Click **Cancel** and go back to the original or default view.



Letter Templates

Search | Search | Reset | + New Template

No	Title	Action	Created by	Created On
1	Absconding Warning letter	Generate	uKnowva System	06-02-2024
2	Appraisal Letter	Generate	uKnowva System	06-02-2024
3	Bonafide Certificate	Generate	uKnowva System	06-02-2024
4	Consultant ContractÂ Agreement	Generate	uKnowva System	06-02-2024
5	Declaration Form 1	Generate	uKnowva System	06-02-2024
6	EPF-Form-2	Generate	uKnowva System	06-02-2024
7	EPF-Form11	Generate	uKnowva System	06-02-2024
8	Experience Letter	Generate	uKnowva System	29-12-2023
9	Full and Final Settlement	Generate	uKnowva System	05-02-2024

Now close this window and choose to skip this question entirely for now.

You will be asked once again to **confirm**. Click it and proceed to the next step by clicking the **Next** button.

3. Adding Employees and Configuring Their Roles

Configure access control or roles and add new employees into the system in this step. Fetch insights in advance at the top related to the currently existing access control roles and employees in the system.

3.1 User Roles

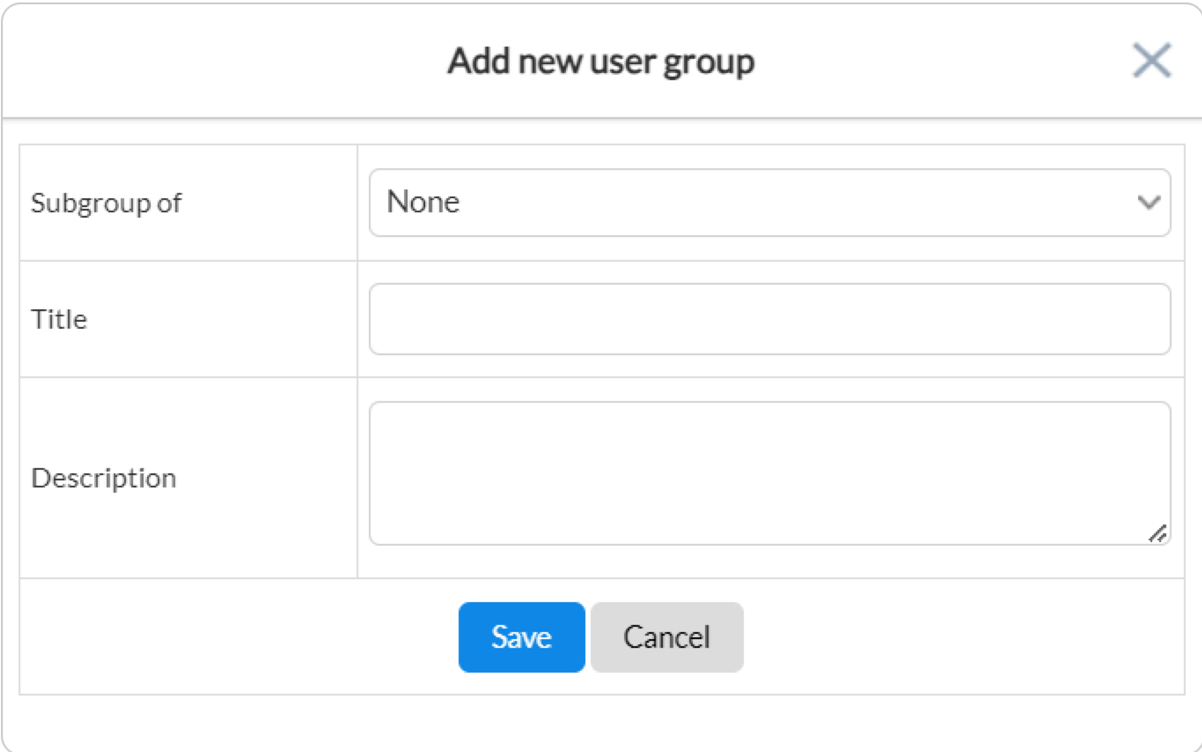
The first section of this step asks you to define **access control roles.**

Pre-configured roles you get include:

- Admin
- HR Manager
- Employee

Select **use default user roles** to use the default settings available at uKnowva instance.

Click on "**No, define new user roles"** to set up a new role in your organisation. A new window appears. Define the new role's subgroup if any, its title, and description. Then, click **Save** to add the role or click **Cancel** to restart the processing of adding a new role.



Close the window and click "**View default user roles"** to check the existing roles in your organisation. The pop-up window shows you the number of users and IDs subscribed to each role.

User Groups Manager

Add New Group

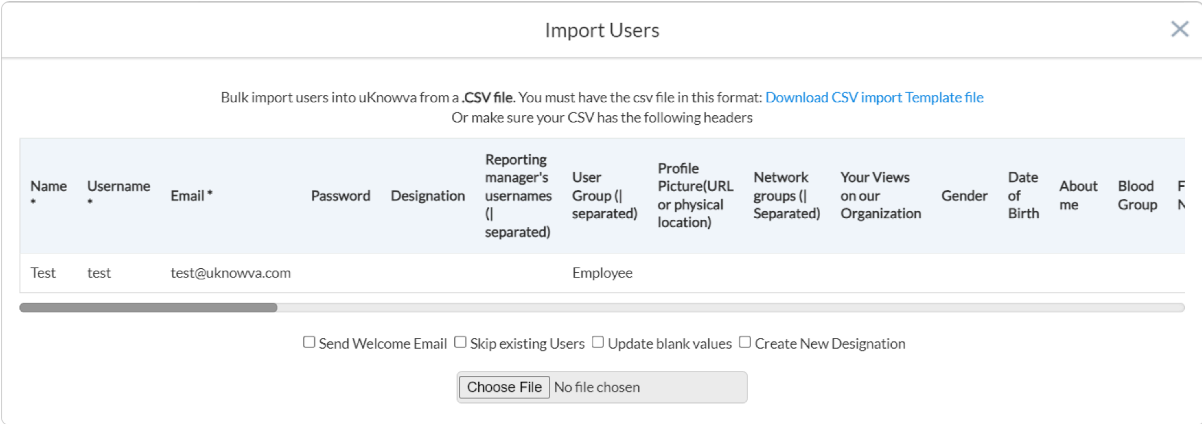
Title	Description	No. of Users	ID
Admin	User belonging to this user group have additional access to key functions like Configuration, etc. Place only selected users under this group	2	7
Employee	All employees will be mapped to this user group.	9	2
- Administration Team	The administrative team needs to be mapped here. These employees will be notified by the system when queries are raised under "Talk to admin" page. Additionally, they will also get access to approval pages of set workflows.	0	33
- Consultants	If you have consultant working with you, map them under this user group	0	29
- Finance Team	The finance or accounts team needs to be mapped here. These employees will be notified by the system when queries are raised under "Talk to finance" page.	0	32
- HR Manager	The HR Team needs to be mapped here. These employees will be the default admin of the HR modules. They will be notified whenever actions are carried oout on any HR related modules and sub modules.	1	27

Once you're done adding new roles as per your requirement, click the **confirm and proceed button** and move to the next component.

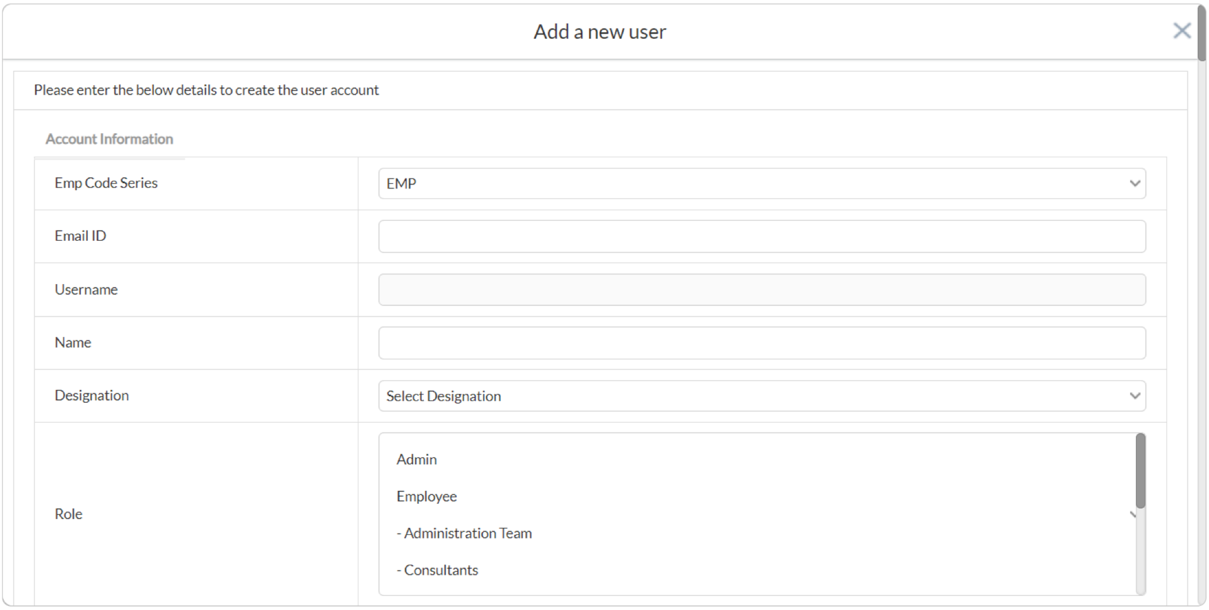
3.2 Employee Database

The second component of this step lets you add or import employee data into the HRMS.

Click **Import Employees** to upload employee data in bulk using a CSV file. A new window appears. It has a sample CSV file to download in case you don't know the format to use to fill the new employee data for onboarding purposes.

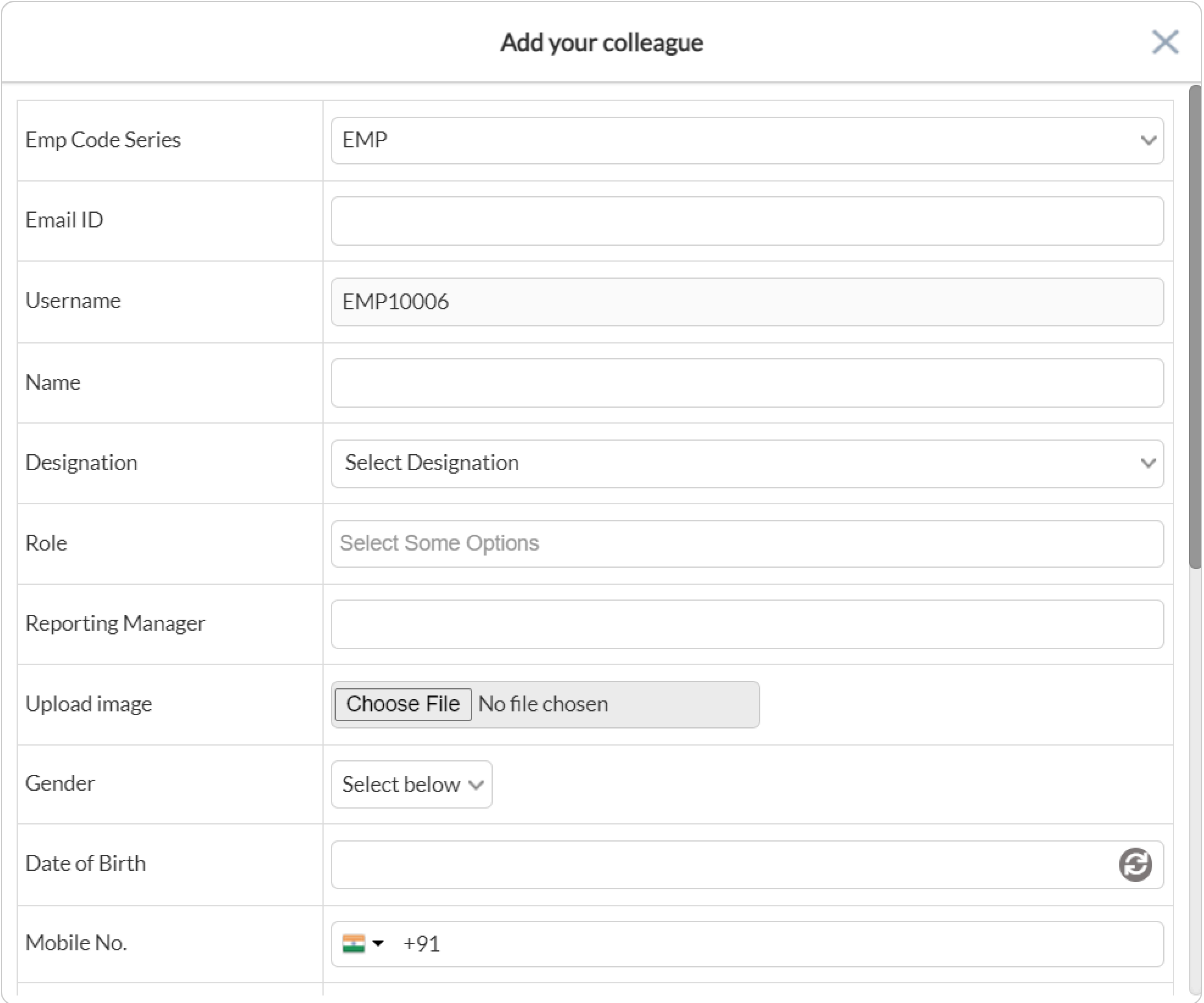


Close the window once done. Click on the **Onboard Employee** to add employee details manually. To do that, a new window appears after clicking this button.

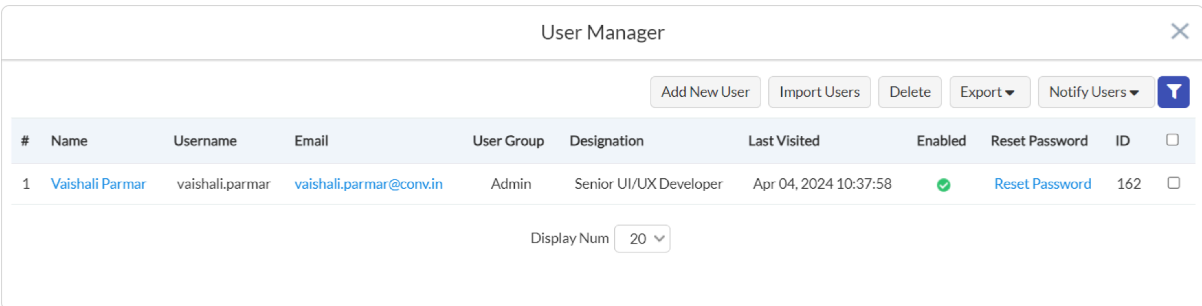


Fill all the relevant information in various groups like **Account information, basic information, personal information, contact information**, etc. Click **Save** once done or else click **Cancel** and complete the entire onboarding process.

Close the window. Another option is **Quick Onboarding** for adding minimum employee details quickly with information like **Emp Code, Username, email ID, Role, Designation, Reporting Manager, Date of Joining, Mobile no.** etc.



Once done, click **Save** or click **Cancel** to start again. Close this window and click on "**View existing employees**." A new window pops up and lets you view details of the employees already existing in the system.



Once done adding and reviewing employees details, click the **confirm and proceed** button and move onto the next step.

4. Setting Leave Approval Process

Configure the leave management and approval workflow at this step. Get the insights on total holidays and leave types already added in the system.

4.1 Leave Configurations

Move to the first component of this step that asks you to set and view default leave configuration settings.

Either click on "**Yes, use default configurations**," otherwise, click on "**View & set leave configurations**."

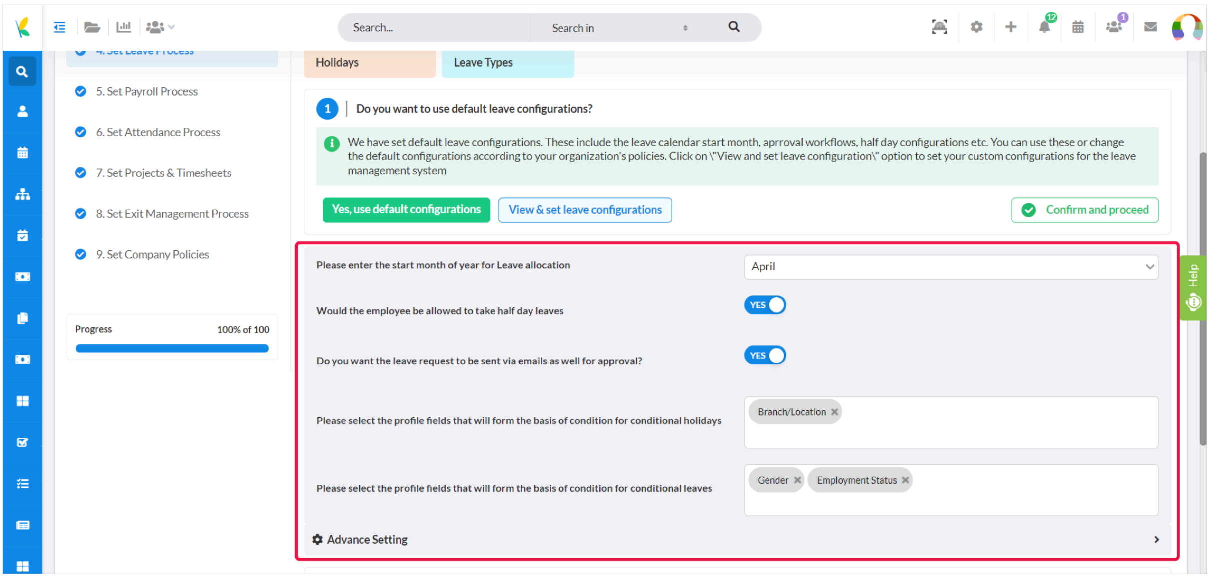
A form appears in front of the option. Add all the information for configuration of leaves, like:

- Start month of the year
- Would you allow half-day leaves to employees
- Should leave requests and approvals be sent on emails?
- Add profile fields to filter out conditional holidays and leaves further.

Further, click on the **Advance Setting** which will populate another form that has details, like:

- Whether to allow HR/Manager to apply for leaves on employee's behalf?
- Max holidays allowed at a time?
- Set default approver for optional holidays

Once done, click on **confirm and proceed button**.



4.2 Holidays List

Move over to the second component of the page where you need to add holidays.

Click **“Yes, use default holidays**,” if you do not want to change any existing holidays list.

Click “**Add Holidays,”** when you want to add new holidays in the list.

When you do so, a new window opens. Fill the date and occasion. Choose whether it is an yearly holiday or a conditional holiday, and whether you need to keep it optional.

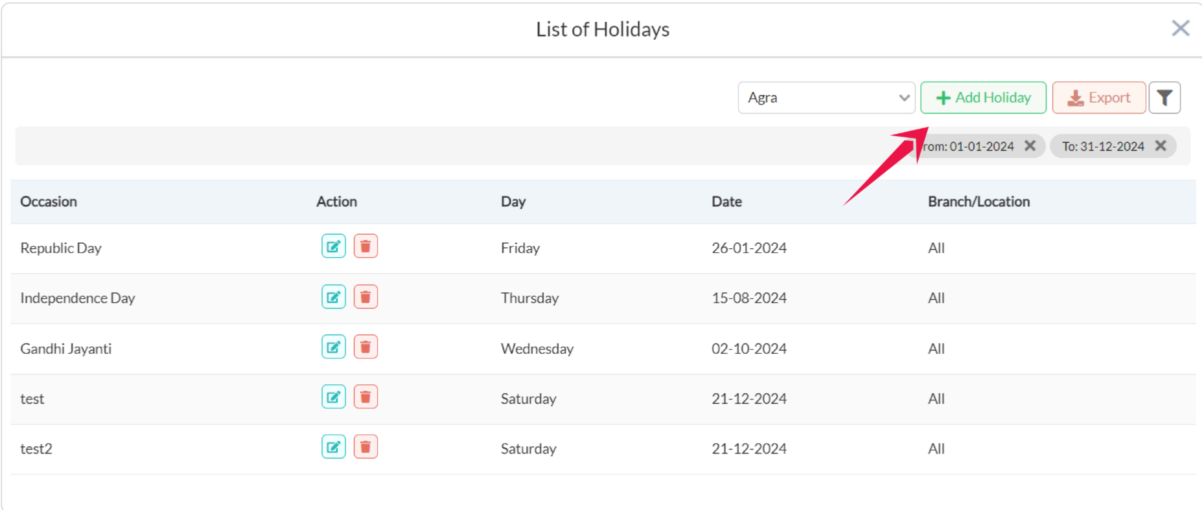
Once done, click on the **Save** button or click **Cancel** to restart.

Close the window and click on the third option, **“View default holidays**,” if you want to view and edit the list further. So on this new window, you get options like an **Export** button on the top right side to download the list. **Funnel** button to filter the page view.

You will also see the **+ Holidays** button to add new holidays from this page view.

You can also edit the current list of holidays by clicking the **pen** icon in front of each. Otherwise, click the **dustbin** button to delete the respective holiday there.

Once you’re done checking and viewing the list, close the window and click **confirm and proceed** for the next section/component to configure.



4.3 Leave Types

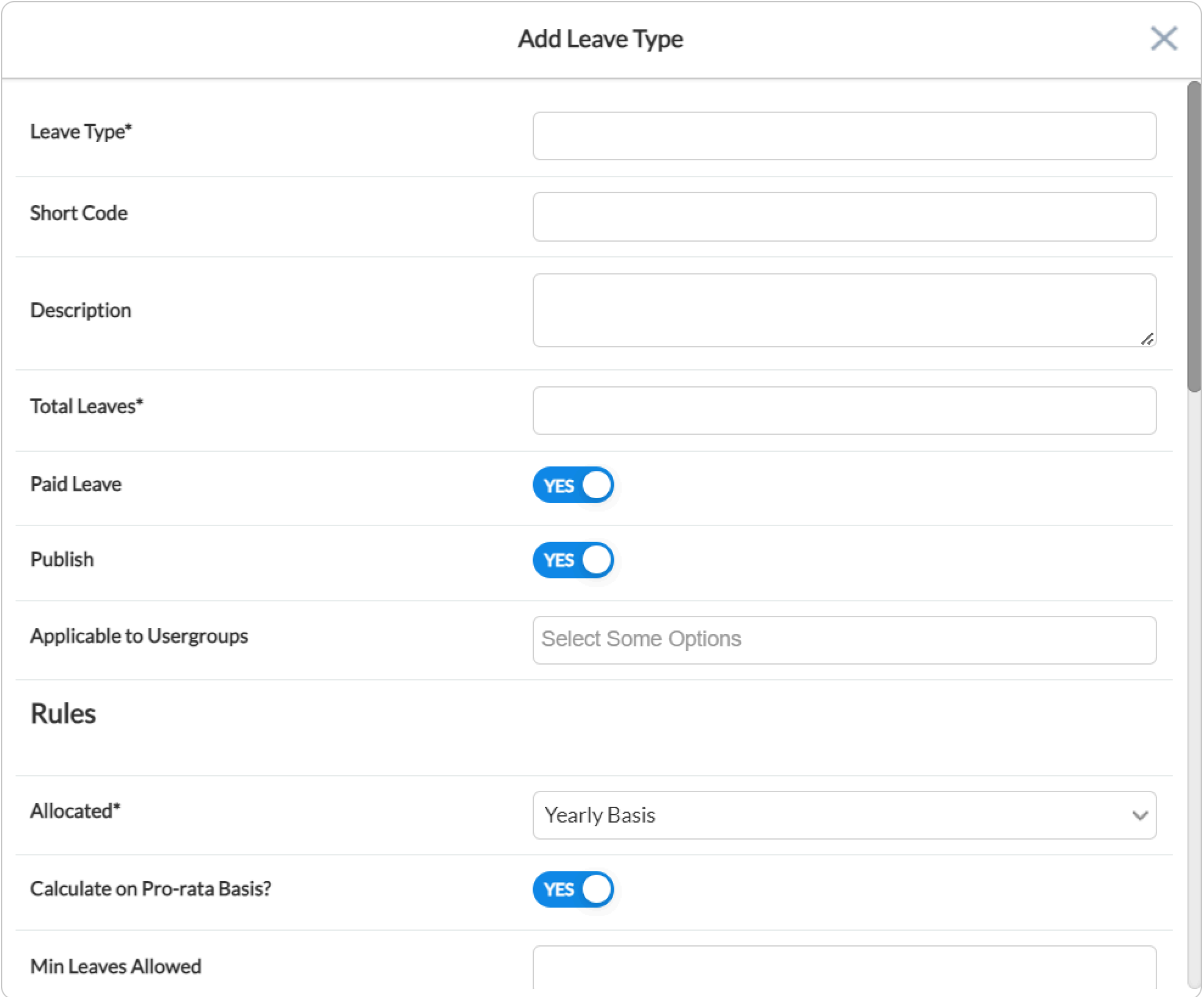
Move to the next section where you have to fix or add new leave types.

Click on, “**Yes, use default leave types**,” if you do not wish to change the default settings.

Click on, “**Add new leave types**,” if you want to add new leave types in the existing list.

So, when you click on it, a new window appears.

It gives you a form that asks you to fill in the relevant information like **Leave Type, short code, total leaves, description of the leave type**.



Then, you have to select whether the leave type needs to be published, whether it is going to be a paid leave, and which groups should that be applicable to.

You have other rules in the same leave types form to select before finally publishing it. This can include rules like period for which it should be allocated for, whether to calculate it on a pro-rata basis, minimum and maximum leaves allowed under this type, whether applicable for sandwich rule, whether encashable or not, whether proof should be required or not, etc.

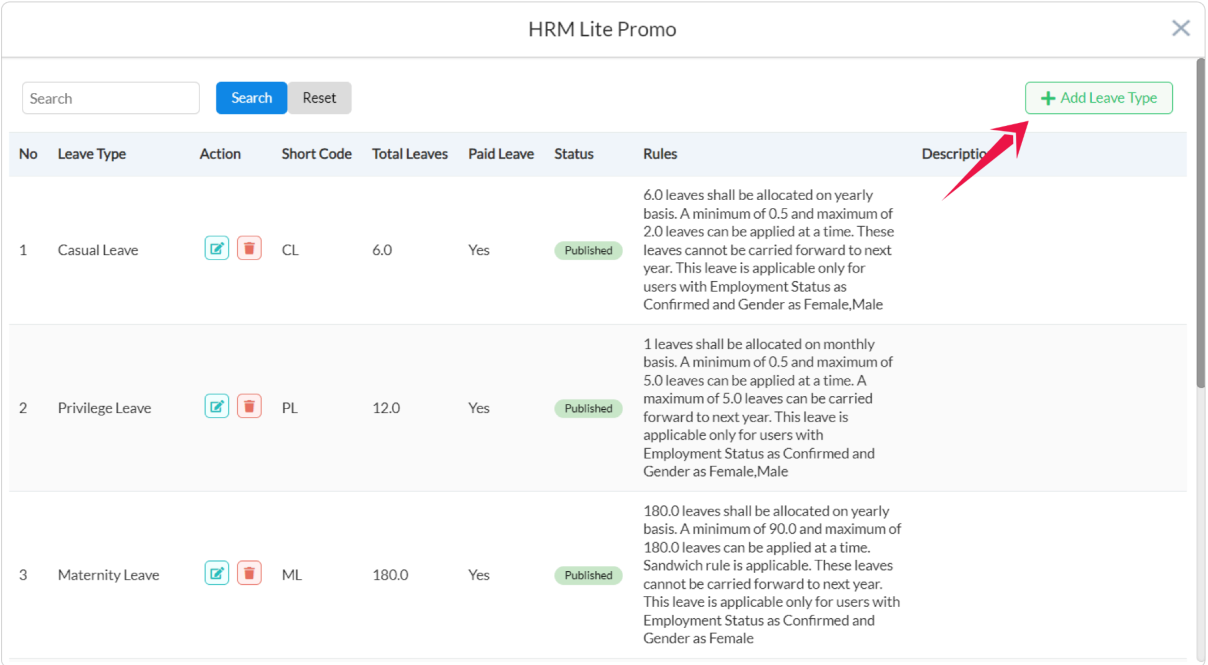
Once you're done applying all the required rules on the newly added leave type, click on **Save** and get it published. Otherwise, click **Cancel** and restart the process to add this leave type.

Close the window and click on the third option, "**View default leave policy**," to review the recently added leave types as a new window pops-up.

You can add a new leave type from this window by clicking + **Add Leave Type** at the top right corner. Filter the page by typing keywords or key phrases at the top left side corner. Click **Search** to finalise the filter view or click **Reset** to go back to the default page view.

You also have the option to click the **pen** button in front of each existing leave type to edit its rules or existing details. Otherwise, you can also click the **dustbin** button to delete the chosen leave type from the system.

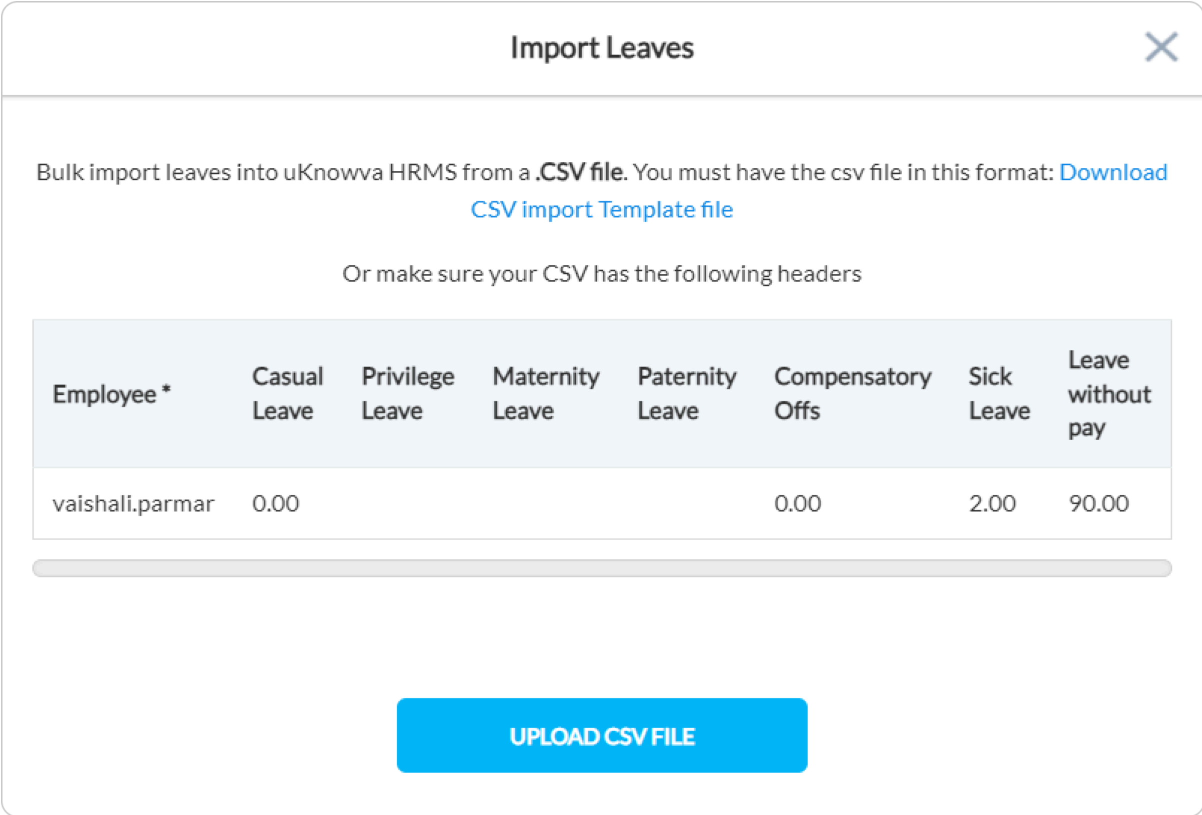
After a detailed review, close the window. Then click on **confirm and proceed** button and move onto the next section.



4.4 Leave Balances

The last component of this step asks you to import employee leaves balances. Click on "**Import employee leave balance**" to upload the CSV file as the new window opens up. Download its template file to know the format from the same window. The option is available at the top.

Once done uploading by clicking on "**Upload CSV file**," close the window.



Now click on the **"Show leave balance data"** to review the existing leave balance data. The window that opens will reflect all the leave balances of your current team members in a tabular format.

Click on "**Accrued Leave Balance**" to check the added leave balance for all the team members up to the current date. Click on the **Import** button to import the CSV file. Click on the **Export** button to download this list to your computer.

Then, you get a **Funnel** button at the top right extreme corner. Click it to filter the page view based on user group, branch/location, department, PT state, user status, etc. Click **Search** once you're sure of the fields to filter. Or else, click **Reset** to view the original page.

Use the **pen** icon under the team member on the page to edit their balances with reasons for the adjustment.

Close the window once you're done with this task and click the **confirm and proceed** button to finalise this section's settings. Click **Next** to continue.

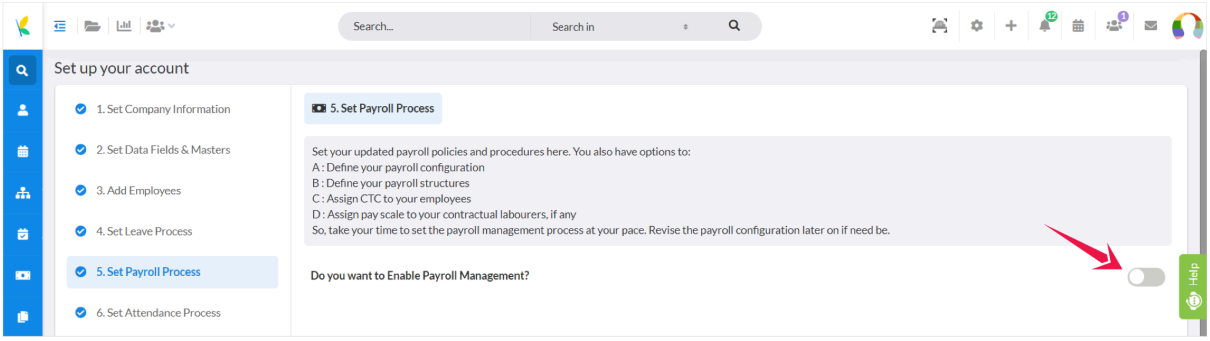
Leave balance of all users

Accrued Leave Balance | Import | Export

No	Employee	Action	Casual Leave	Privilege Leave	Maternity Leave	Paternity Leave	Compensatory Offs	Sick Leave	Leave without pay	Total
1	uKnowva System		0.00 day(s)	NA	NA	NA	0.00 day(s)	2.00 day(s)	90.00 day(s)	92 day(s)
2	Vaishali Parmar		-0.50 day(s)	NA	NA	NA	0.00 day(s)	2.00 day(s)	90.00 day(s)	91.5 day(s)

5. Setting Payroll Process

You may or may not want to enable payroll management. So, when you go onto this page, toggle the answer of the question if you want to enable payroll management.



First it is toggled on, proceed with the below steps for configuring it as per your organisation's current policies and requirements.

5.1 Salary Setup

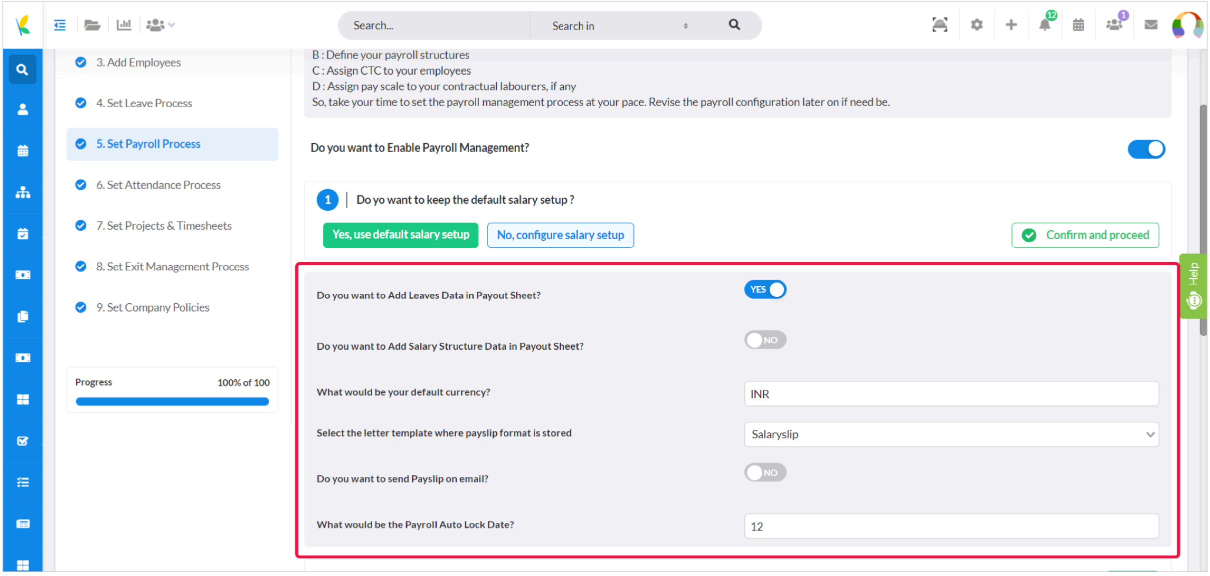
The first section asks you whether you want to keep the default salary set up. If yes, click on "**Yes, use default salary setup.**" If not, click on "**No, configure salary setup.**"

A form then populates in front of you in the same section. It will have various questions for you to answer and configure the salary setup.

These include:

- Do you want to add leaves in the payout sheet?
- Do you want to add the existing salary structure in the payout sheet?
- Currency of the salary to denote the compensation
- Letter template to select for the pay slips
- Whether to send pay slips on email or not

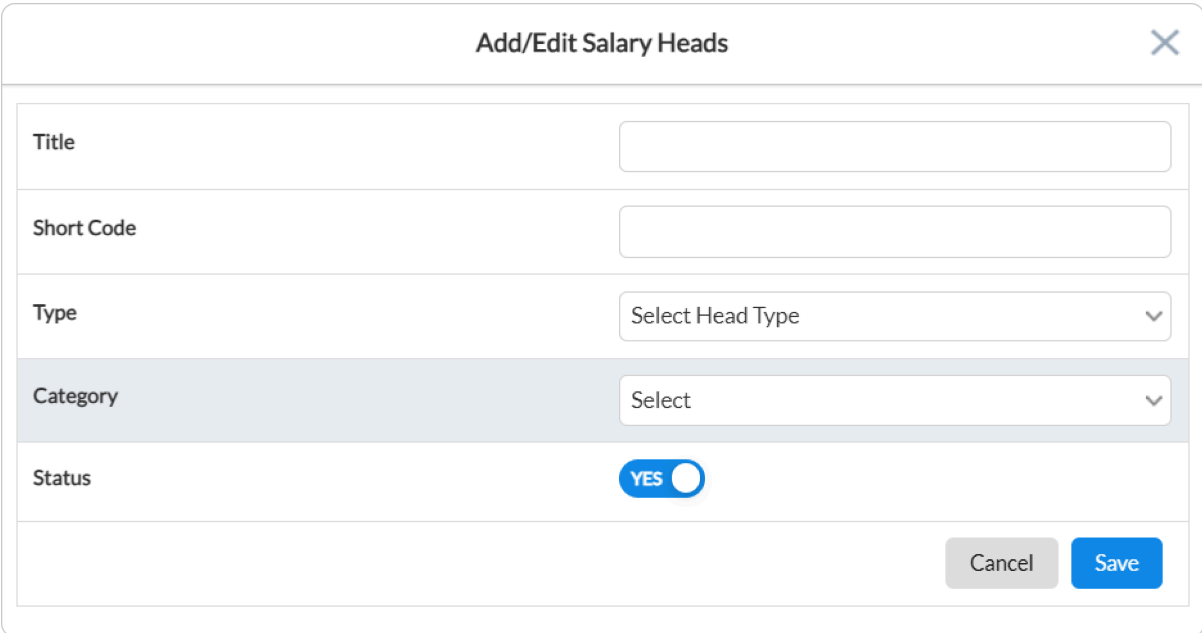
Once you're done configuring this setup, click on **confirm and proceed** button to finalise settings for this section.



5.2 Salary Components

The second section or component lets you configure the salary components. Click "**Use default components**" to go with the default settings. Click **"Add salary components"** to configure this further.

Add the **Title of the salary head, short code, type, category** etc., on the new window that opens up. Click **Save** to update/add the settings or click **Cancel** to begin again.

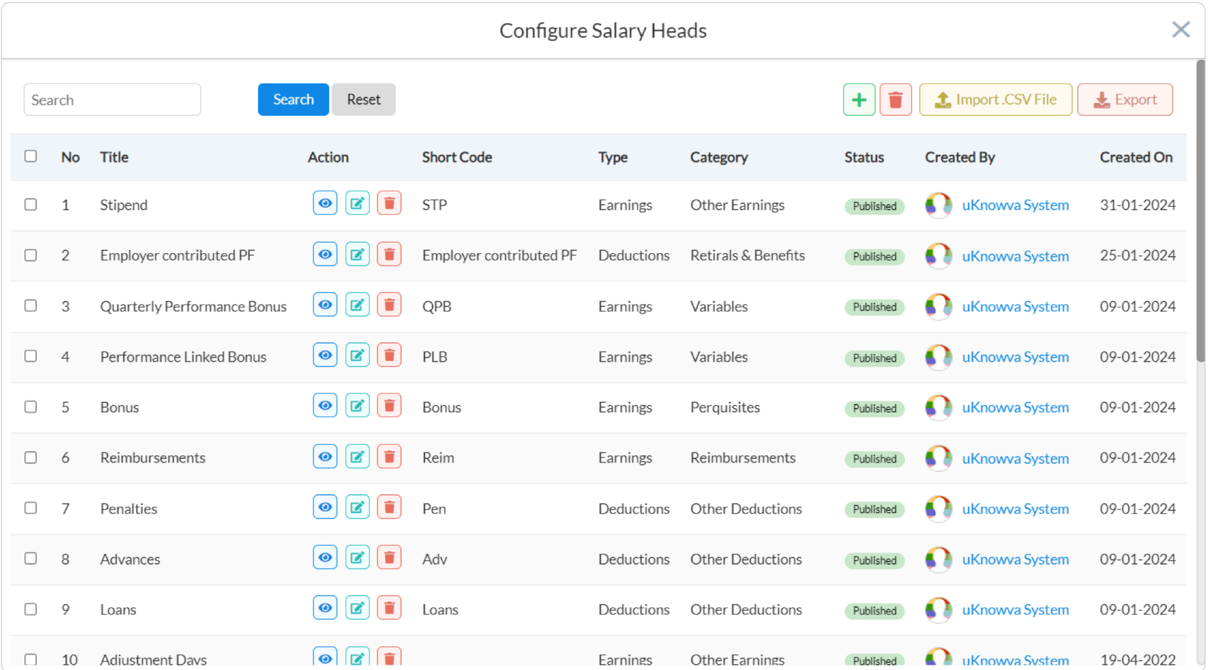


Close the window and click "**View Default**" to view and edit the existing salary heads or components from the new windows that you see now.

Click on **+** button to add new salary heads. Click on the **dustbin** button to delete multiple salary heads at once. Click on the **Import** button to upload the CSV file of the salary head types. Click on the **Export** button to download the existing list of the salary heads.

Otherwise, you click on the **eye** button in front of each salary head to view their details. Click on the **pen** button to edit their details. Click on the **dustbin** icon under the action section to delete the selected salary head particularly.

Lastly, you can filter this page view by typing keywords or key phrases on the search bar on the top left corner. Click **Search** to filter the view and click **Reset** to go back to the original view of this window/page.


Configure Salary Heads

Search | Search | Reset | Import .CSV File | Export

No	Title	Action	Short Code	Type	Category	Status	Created By	Created On
1	Stipend		STP	Earnings	Other Earnings	Published	uKnowva System	31-01-2024
2	Employer contributed PF		Employer contributed PF	Deductions	Retirals & Benefits	Published	uKnowva System	25-01-2024
3	Quarterly Performance Bonus		QPB	Earnings	Variables	Published	uKnowva System	09-01-2024
4	Performance Linked Bonus		PLB	Earnings	Variables	Published	uKnowva System	09-01-2024
5	Bonus		Bonus	Earnings	Perquisites	Published	uKnowva System	09-01-2024
6	Reimbursements		Reim	Earnings	Reimbursements	Published	uKnowva System	09-01-2024
7	Penalties		Pen	Deductions	Other Deductions	Published	uKnowva System	09-01-2024
8	Advances		Adv	Deductions	Other Deductions	Published	uKnowva System	09-01-2024
9	Loans		Loans	Deductions	Other Deductions	Published	uKnowva System	09-01-2024
10	Adjustment Days			Earnings	Other Earnings	Published	uKnowva System	19-04-2022

Close the window once you're done and click **confirm and proceed** to finalise these configurations and move onto the next section of this step.

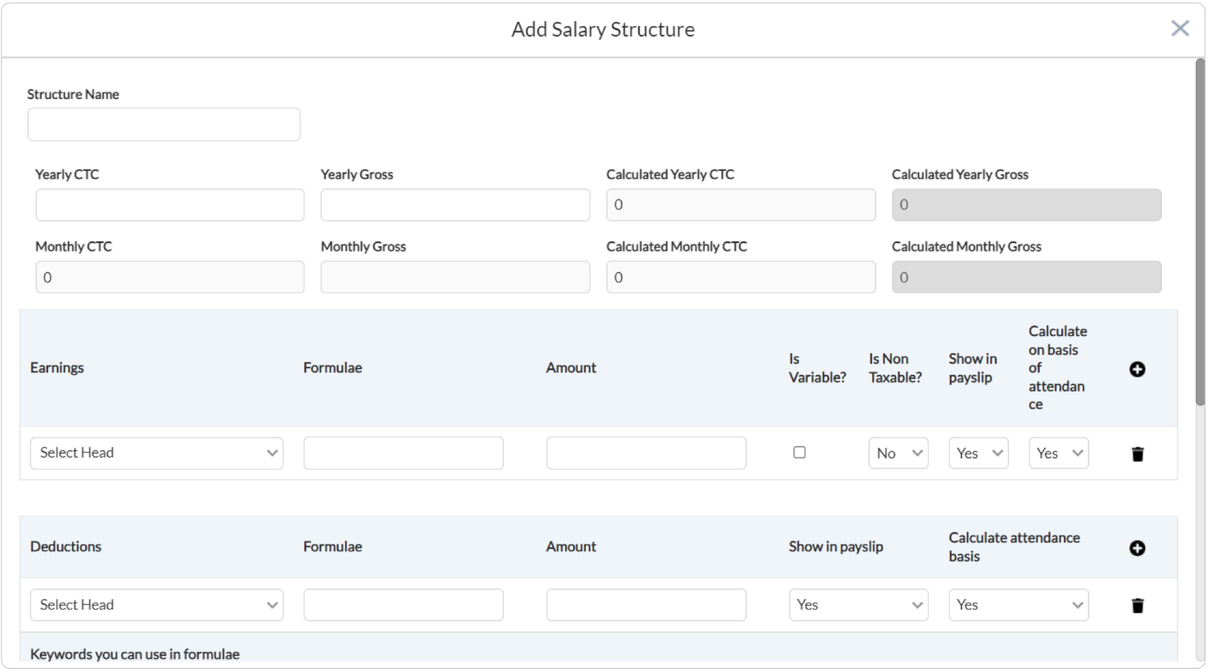
5.3 Salary Structure

Under the next section, you need to configure the salary structure format. Click on "**Use default structure"** to use the existing ones. Click on **"Add salary structure"** and wait for the new window to pop up for you to configure it further.

Add the S**tructure Name, Yearly CTC, Yearly Gross, Calculated Yearly CTC, Monthly CTC, Monthly Gross, Calculated Monthly CTC** etc., in this calculator. Afterward, add earnings and deductions by naming each one of those with formulae and amount.

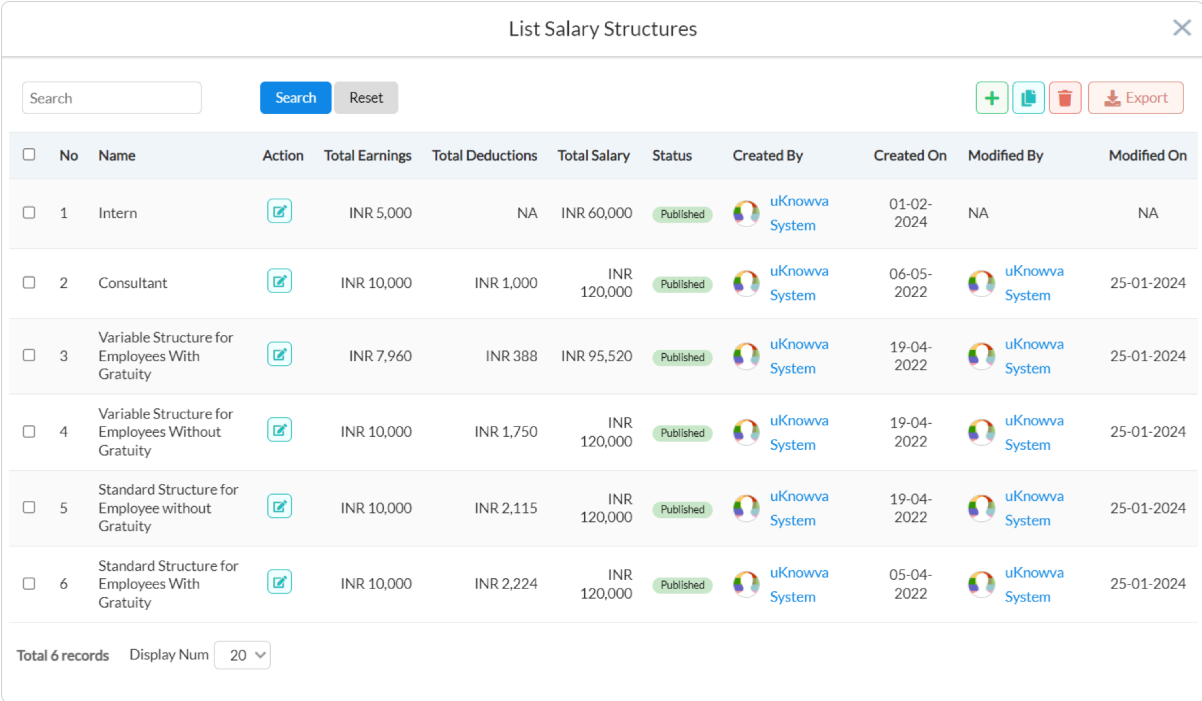
Find the explanations of the relevant key terms at the end of this form while modifying the salary structure for clarity on which term to use.

Click on **Save** when you're done editing or click **Cancel** when you need to restart.



Close the window and view default settings by clicking on "**View Default**." This opens a new window that lists all current salary structures in your organisation. It will have all the information related to your salary structures like:

- Name of the structure
- Total earnings
- Total salary
- Status
- Created by
- Created on



List Salary Structures

Search | Search | Reset | Export

	No	Name	Action	Total Earnings	Total Deductions	Total Salary	Status	Created By	Created On	Modified By	Modified On
☐	1	Intern		INR 5,000	NA	INR 60,000	Published	uKnowva System	01-02-2024	NA	NA
☐	2	Consultant		INR 10,000	INR 1,000	INR 120,000	Published	uKnowva System	06-05-2022	uKnowva System	25-01-2024
☐	3	Variable Structure for Employees With Gratuity		INR 7,960	INR 388	INR 95,520	Published	uKnowva System	19-04-2022	uKnowva System	25-01-2024
☐	4	Variable Structure for Employees Without Gratuity		INR 10,000	INR 1,750	INR 120,000	Published	uKnowva System	19-04-2022	uKnowva System	25-01-2024
☐	5	Standard Structure for Employee without Gratuity		INR 10,000	INR 2,115	INR 120,000	Published	uKnowva System	19-04-2022	uKnowva System	25-01-2024
☐	6	Standard Structure for Employees With Gratuity		INR 10,000	INR 2,224	INR 120,000	Published	uKnowva System	05-04-2022	uKnowva System	25-01-2024

Total 6 records Display Num 20

Click on **+** icon at the top corner to add more salary structures manually. Select a salary structure by clicking on the **white boxes** before those and then click the **clipboard sign** next to the + button to copy those structures.

Click on the dustbin icon next to the clipboard icon to delete the selected salary structures. Click on the Export button, at the extreme top-right corner of this window to download all the structures in the CSV format.

Find the **search bar** at the top left corner. Click on **Search** after typing the keywords or key phrases there and filter the page thereon. Click **Reset** to go back to the original view.

Edit salary structure when you click on the **pen** icon under the Action column of each such structure.

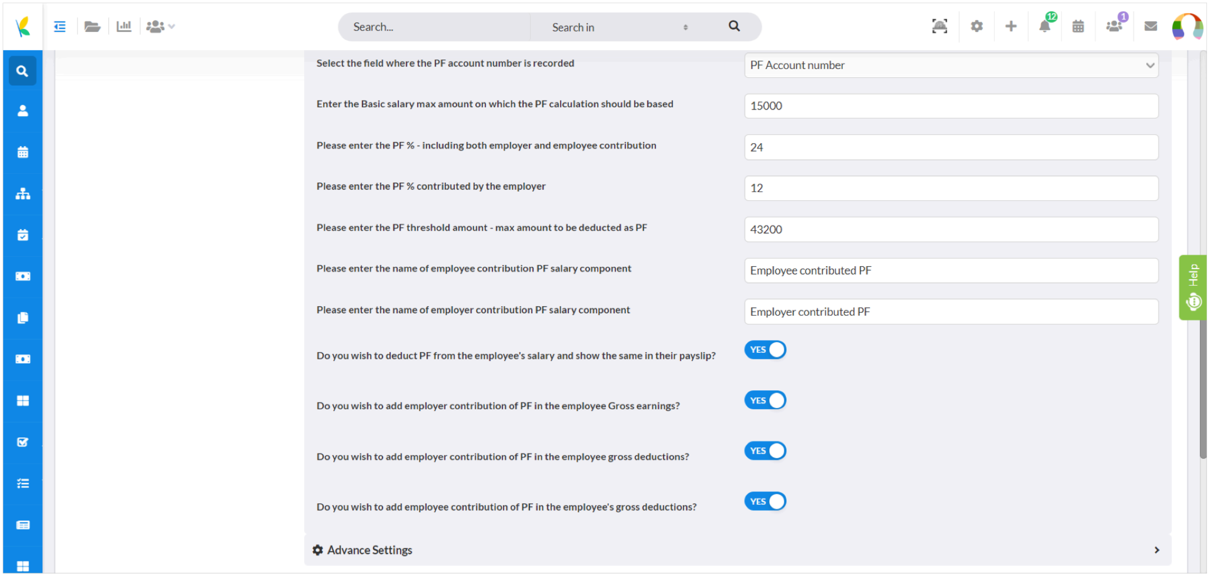
Close the window. Click on **confirm and proceed** and then move to the next section where you need to set up PF.

5.4 PF Setup

Click on "**Yes, use default PF setup,**" if you do not wish to change the current settings. Otherwise, click on "**No, configure PF setup**," for populating a form below that has multiple settings and configurations like:

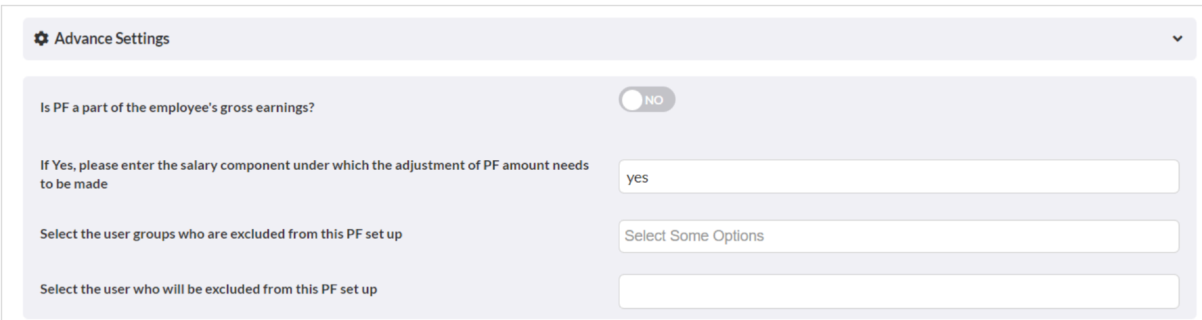
- Enter PF number
- Enter basic salary
- Enter PF % for both employee and employer
- Enter Pf% contributed by the employer

- Should PF be dedicated from the salary?
- Should employer PF contributions be added to the salary?



Then, find and click on **Advanced Settings** which will populate another form that asks you details like:

- Is PF going to be a part of your employee's gross earnings?
- Selecting the user group (s) this PF setup should not be applied to.
- Selecting the user this PF setup should not be applied to.

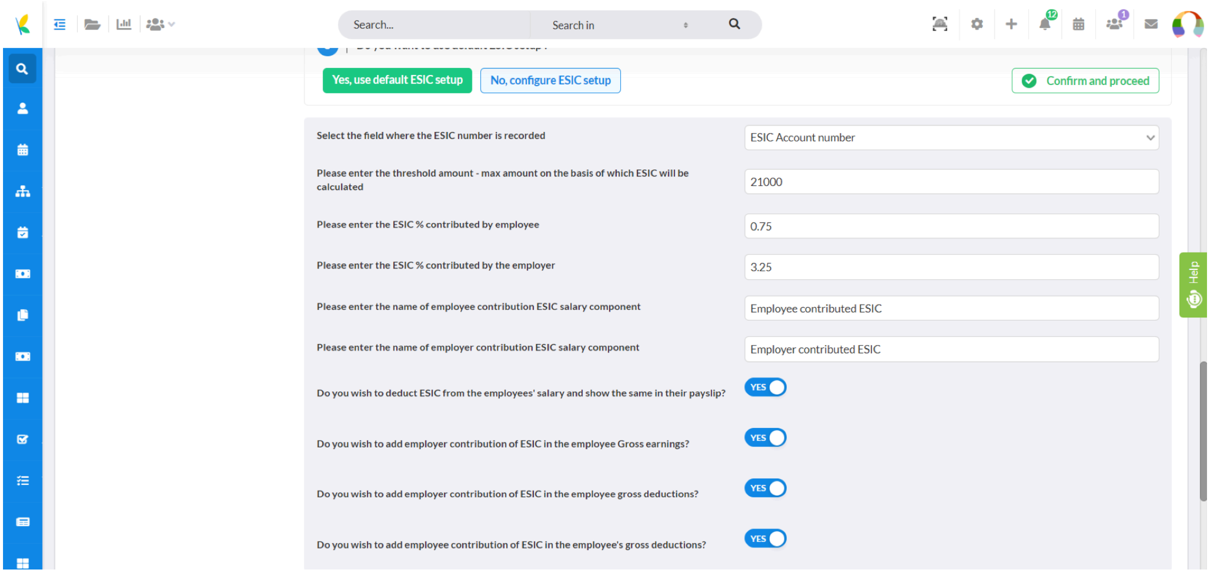


Once you're done with all the configurations, click **confirm and proceed.**

5.5 ESIC Setup

Head to the next section of this step, that is ESIC setup. Now, click on "**Yes, use default ESIC setup,**" if you do not want to change the current settings that you get with this DIY setup.

Otherwise, click "**No, configure ESIC setup**" for opening a new form below which has all the basic and advanced settings for you to configure.



Once you're sure of the settings, click **confirm and proceed.**

5.6 PT Setup

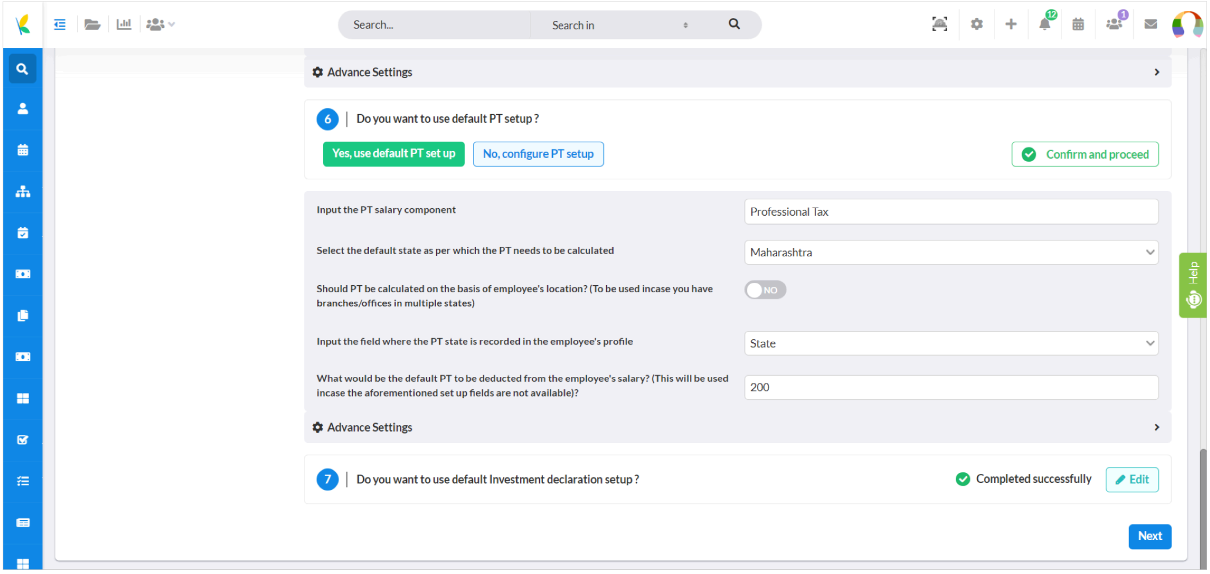
Now, let's focus on the next setup in this stage, that is, PT or professional tax.

If you want to continue with the default settings, click "**Yes, use default PT setup**."

Or else, you can click "**No, configure PT setup**."

This populates a form below the button. You can configure and select basic and advanced settings here like:

- Default state for which you need to calculate and configure PT
- Should you calculate PT based on your staff's location?
- Select the user group (s) to be excluded from the given PT setup or settings.
- List of salary components that you want to exclude from the PT calculations.



Once you're done selecting and configuring the settings of the PT, click **confirm and proceed.**

5.7 Investment Declaration Setup

Now, the last section of this page is to set up investment declaration policies or terms.

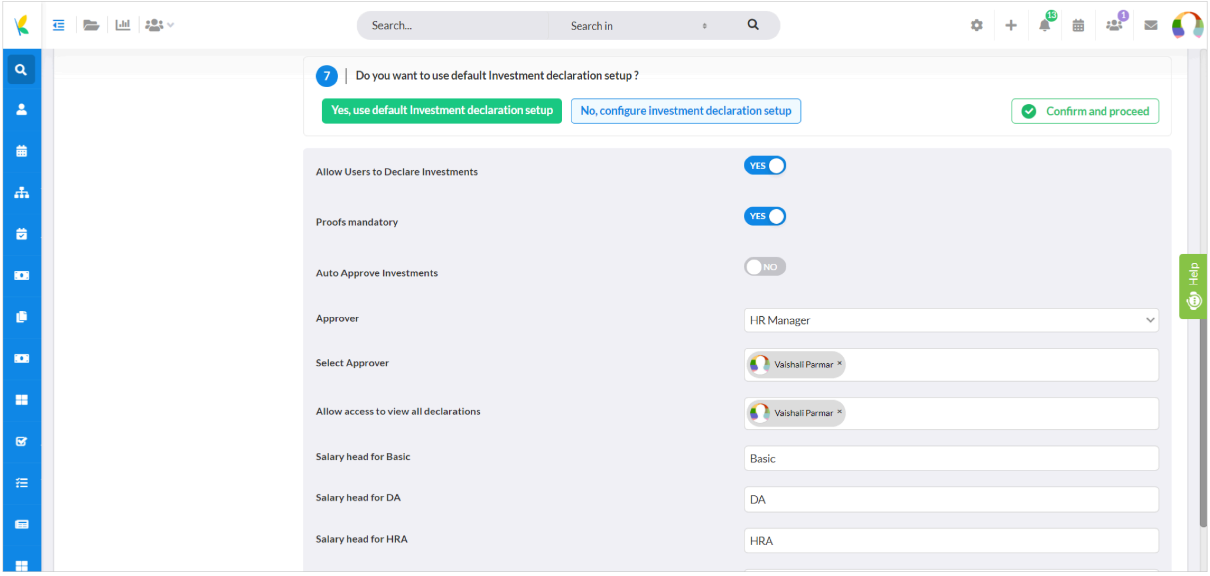
Click on **"Yes, use default Investment Declaration setup,"** if you do not wish to change any current settings.

To change the current ones, click "**No, configure investment declaration setup.**"

A new form opens below the same button.

Find options to toggle, select, or fill related to:

- Whether you want users on the HRMS to declare their investments or not?
- Whether you will make the proof mandatory or not?
- Who will be the approver?
- Select the approver



Once you're done selecting and configuring this section, click **confirm and proceed** and then click **Next** to move onto the next step.

6. Setting Attendance Process

6.1 Virtual Biometric System

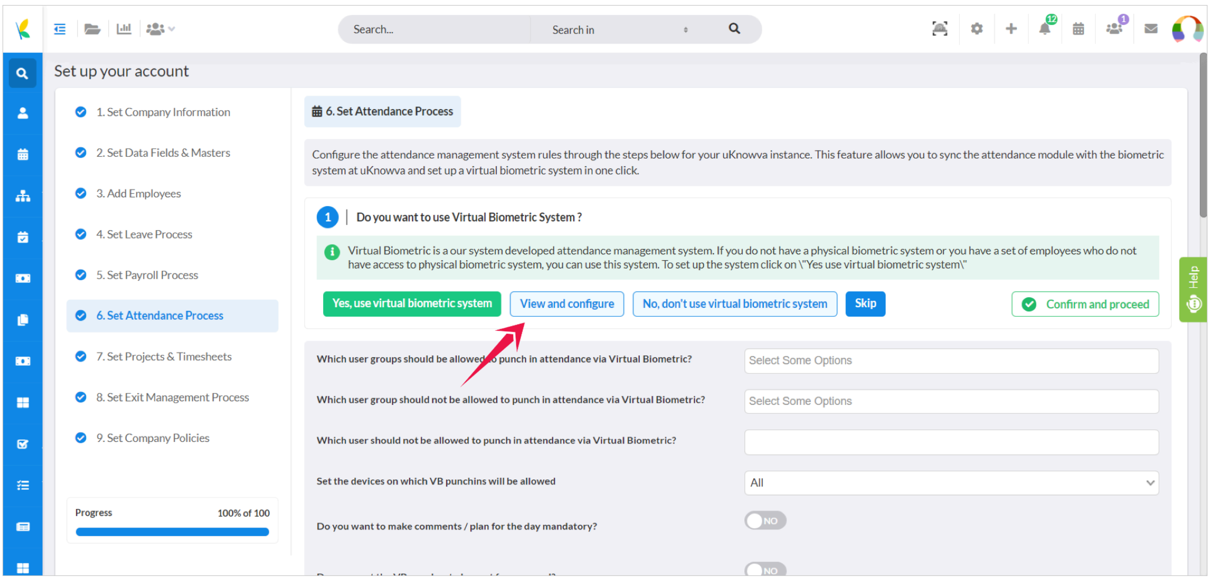
The first section of this step asks you whether you want to set up a virtual biometric system.

Click on **"Yes, use virtual biometric system,"** if you want to go ahead with a virtual biometric

Click on **"View and configure"** when you want to configure your current virtual biometric's settings. This button populates a lengthy form below it. There you will be asked to complete the basic and advanced settings for a seamless virtual biometric system to start working on your HRMS instance.

Once done choosing and selecting the settings, click **confirm and proceed** to configure the next section.

Otherwise, you can click "**No, don't use virtual biometric system,**" or "**Skip**" if you do not want to set such a biometric system right now.

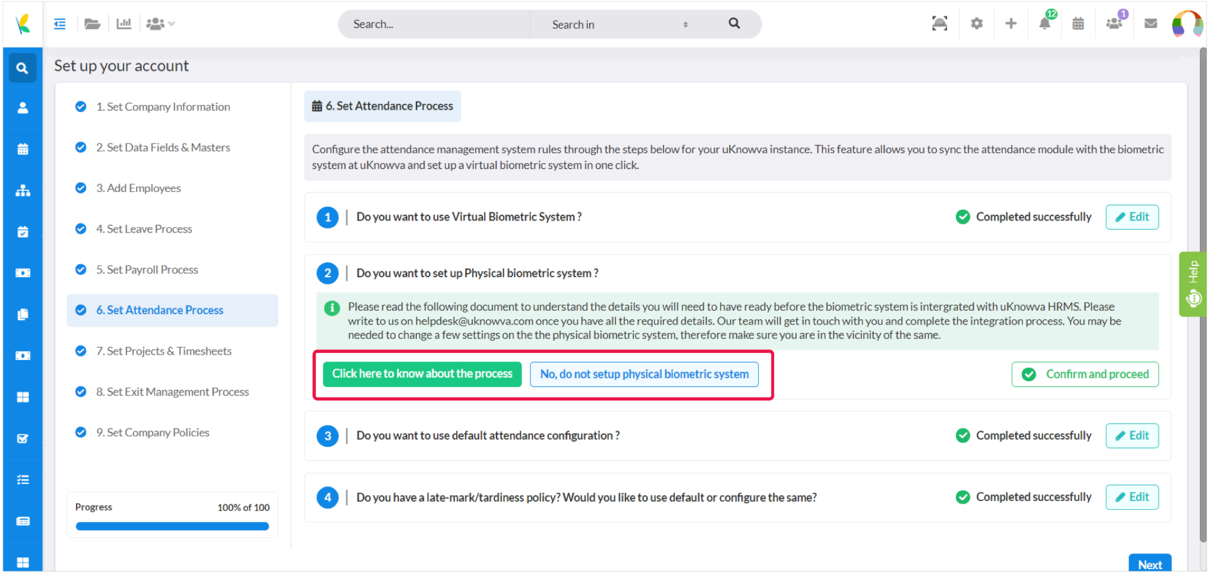


6.2 Physical Biometric System

The next section asks you whether you want to set up a physical biometric system and sync it with your HRMS.

Select the button that says, **"Click here to know about the process"** to read about the right ways to set up a physical biometric and synchronise it with your HRMS. Then, click **confirm and proceed** to move onto the next section of this step.

Otherwise, click "**No, don't set up physical biometric system.**"



6.3 Attendance Configuration

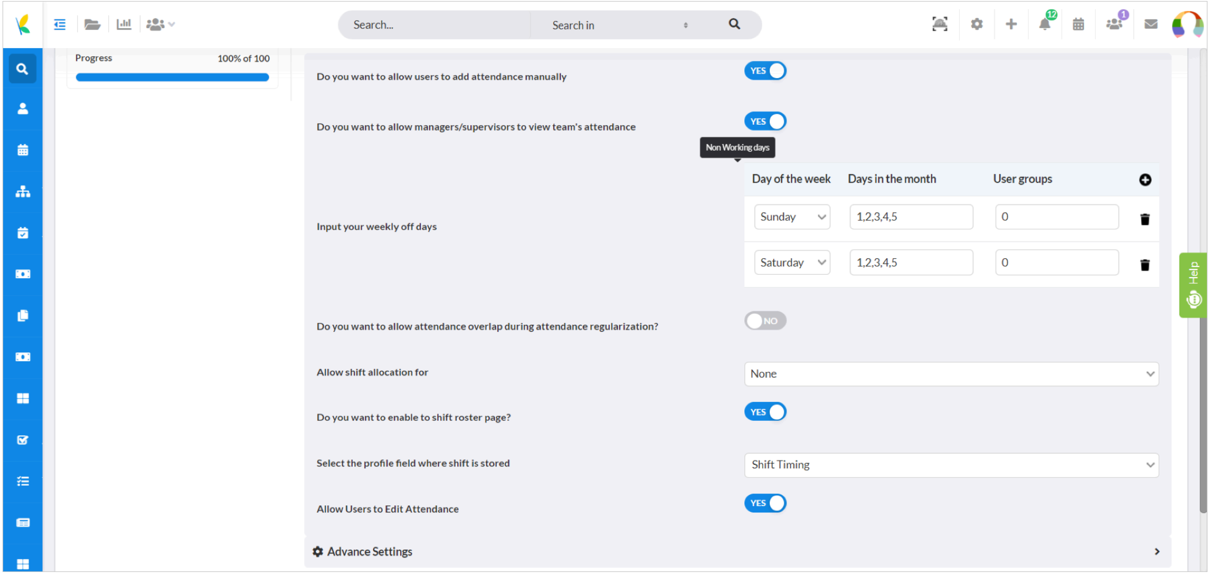
Move to the next section that asks you for attendance configuration setup.

Click “**Yes, use default attendance configuration**,” if you want to go with the system settings without having to change anything.

Click “**No, setup attendance configuration,”** if you want to change the same further. As you click it, a form further populates beneath the button. It has all the basic and advanced settings related to attendance settings to configure like:

- Do you want users to add or punch in their attendance manually?
- Should managers view their team members’ attendance?
- Shift timing to choose for this attendance configuration
- Do you want to enable the shift or roster management page?
- Do you want to mark users as Present by default?
- Threshold of the working and billable hours
- Do you want to allow weekly off or not?
- Default attendance regularisation options to provide to your users

Once you’re done, click **confirm and proceed** to finalise these settings and move to another section.



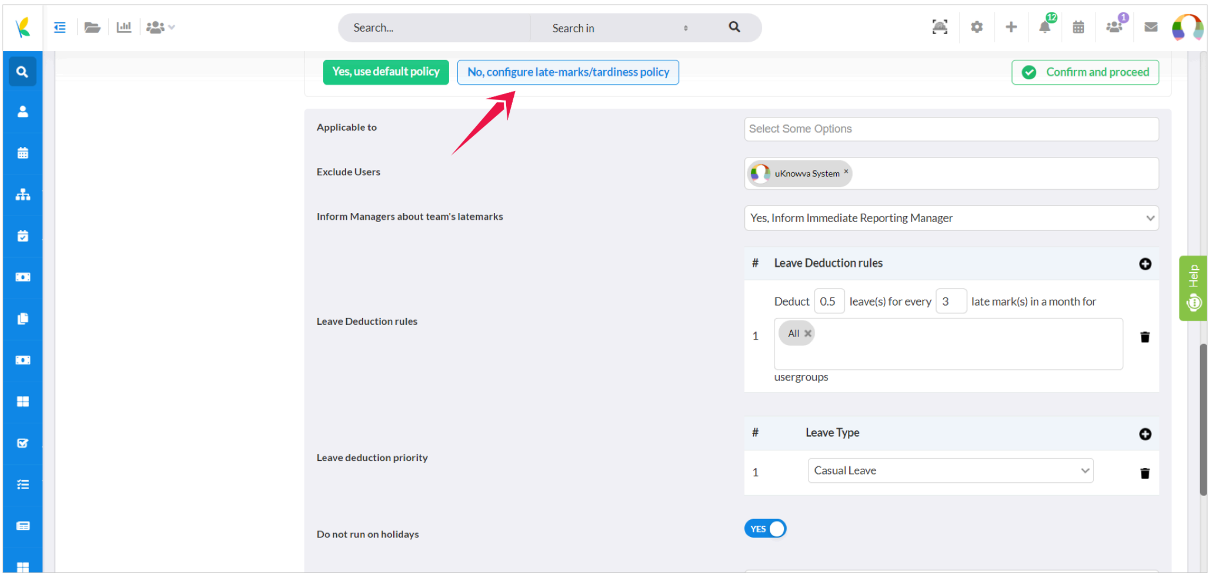
6.4 Late-Mark/Tardiness Policy

The last section of this step asks you to configure a late-mark/tardiness policy.

If you wish to use the default settings, click "**Yes, use default policy.**" Otherwise, click "**No, configure late-mark/tardiness policy.**"

This will open a new form in seconds, beneath the same button.

Fill the form with the relevant information and then click on **confirm and proceed** to finalise the settings you want for this policy and then click **Next** to hop onto the next step in the DIY setup.



7. Setting Projects & Timesheets

You will get highlights of the number of clients and projects at the top of this page first. This gives you an idea of the clients or projects your organisation has added to overview later.

7.1 Timesheets

So, move to the first section of this step, that is, to configure your timesheets settings.

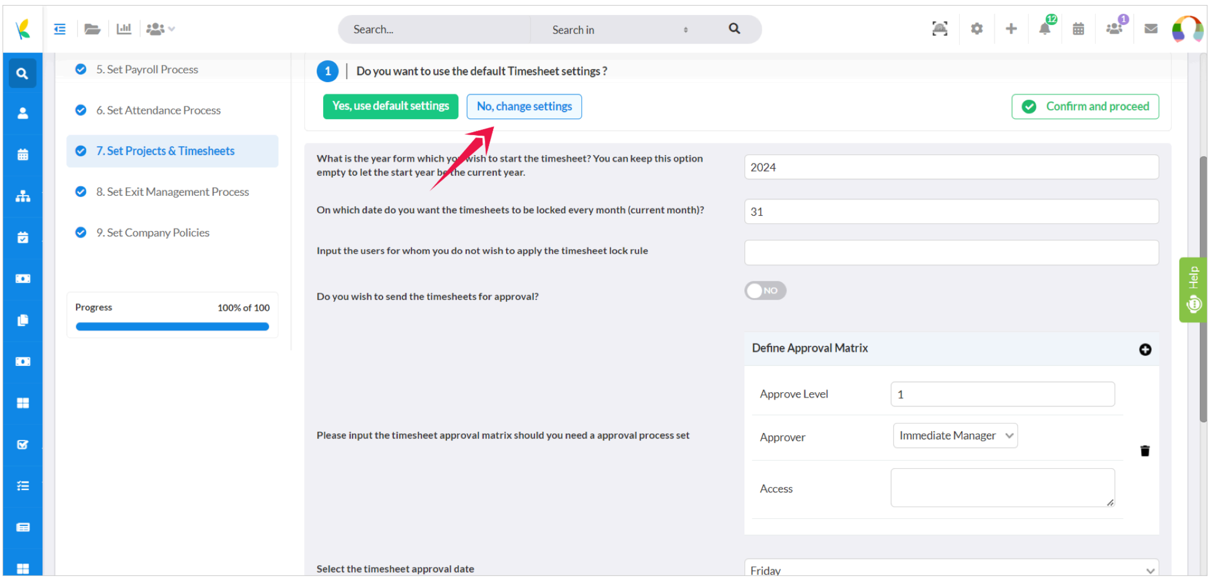
Click **"Yes, use default settings,"** if you want to continue using default configurations for the timesheet module.

If not, click **"No, change settings."**

As soon as you click this button, a new form will appear below it.

It has multiple logical questions to fill out for configuration of your timesheet, like:

- Year of the timesheet
- Date for locking the timesheet every month
- Setting the approval matrix for timesheet approval process
- Selecting the timesheet approval date
- Whether you wish to show leaves on the timesheet or not



Once you've gone through all the logical questions and are done answering those to configure your timesheet, click **confirm and proceed.** This will finalise your timesheet settings for now and help you to move to the next section of this page/step.

7.2 Clients

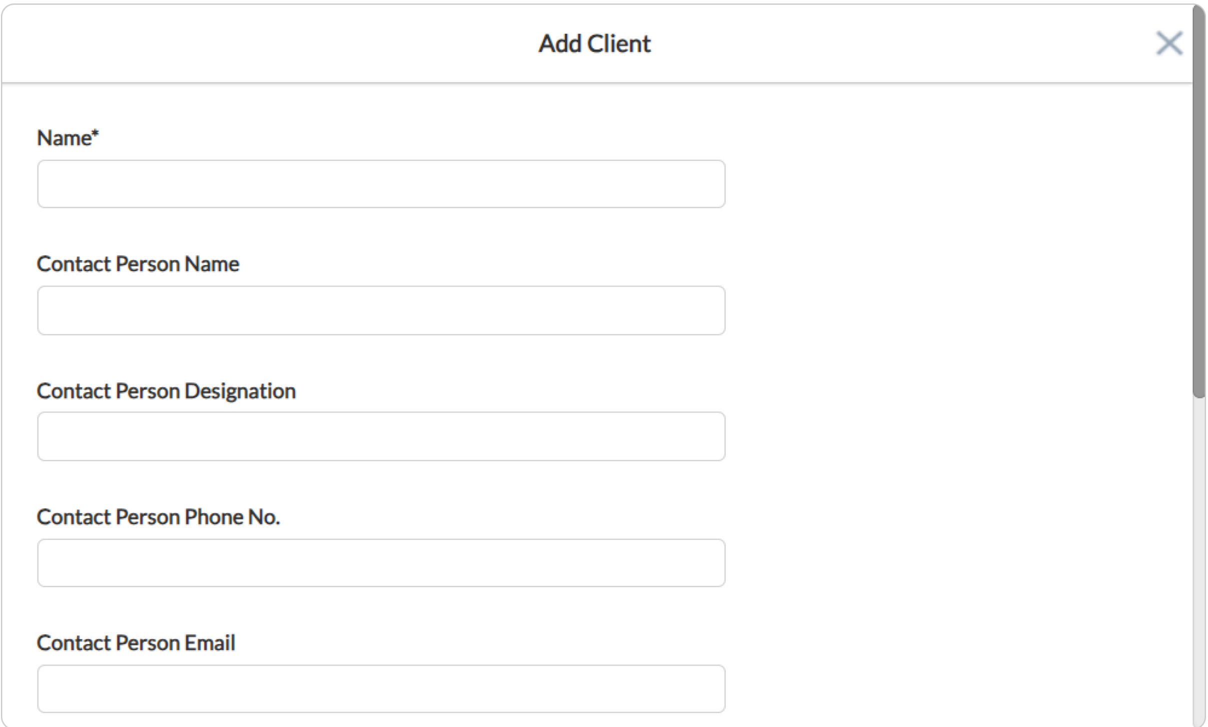
The next section asks you to configure your clients settings.

If you want to continue with the default setup, click “**Yes, use default settings.”**

However, you can click “**Add new client,**” if you wish to add them manually.

A form will open asking you to fill details about your client like:

- Their name
- Contact person name
- Contact person designation
- Contact person contact details
- Address
- Agreement to upload



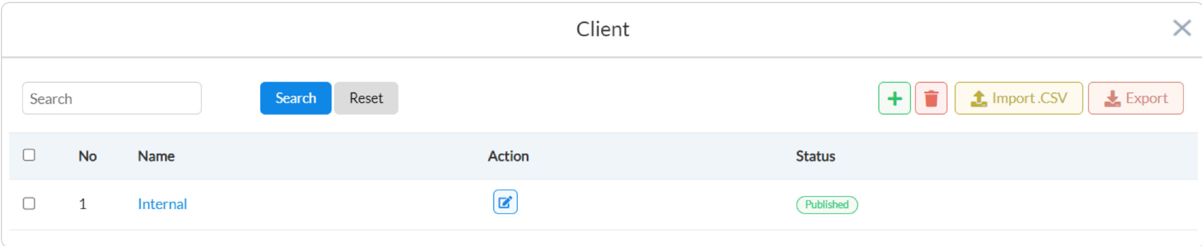
Once you’re done adding all the details, click **Save** and close the window. Otherwise, click **Cancel** and start again.

Additionally, you can click the “**View existing clients**” button to take several actions like:

- Use **+ icon** at the top right corner to add a new client manually.
- Click the **dustbin** icon right next to the + sign to select and delete multiple clients at once.
- Click on the **Import** button to import your client lists in CSV file or format.
- Then, you can click the **Export** button, at the extreme top-right corner to export the entire current list of your clients.

There is a **search bar** at the top left corner. Write keywords or key phrases there and press **Search** to filter the page view. Otherwise, go back to the original view by clicking **Reset**.

Additionally, you can edit the existing clients details by clicking the **pen** icon under the Action column of each client.



Now close the window and press **confirm and proceed** to hop onto the next section of this page.

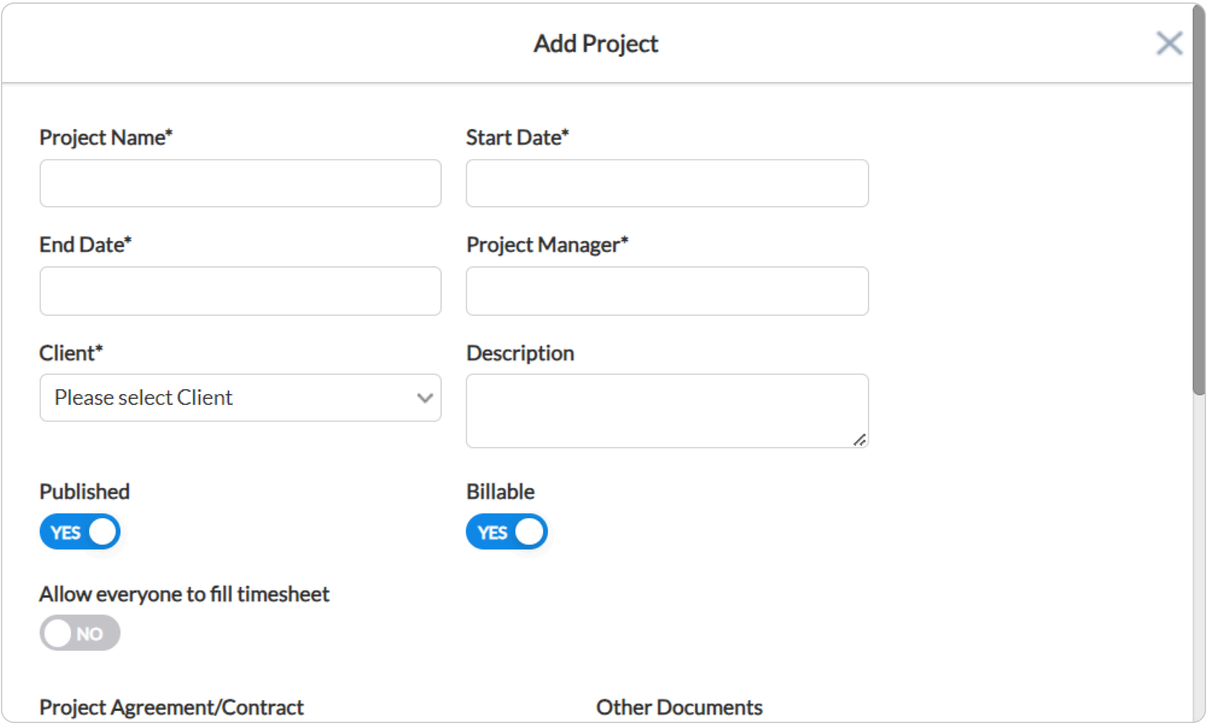
7.3 Projects

The last section of this page is about configuring Projects.

Click "**Yes, use default settings**," if you do not want to configure the details ahead.

Click "**Add new project**" to add new project details manually as a new window appears, asking for details, like:

- Project name
- Start date
- End date
- Project Manager
- Client name
- Description
- Whether to make the project billable or not
- Project agreement to upload
- Project member details to add with their start and end dates



Once you’re done adding a new project with all the details asked in the firm, click **Save** and close the window. Otherwise, click **Cancel** and restart.

To view and audit the current project list, click on the **“View existing projects”** button.

A new window shall pop-up, showing you the complete list of the current projects in your system.

Use **+** icon to add projects manually from here.

Use the **dustbin** icon to select multiple projects and delete their data at once.

Use the **Import** button at the top right corner, next to the dustbin icon, to import the project list in a CSV file.

Use the **Export** button, located next to the import one, to export the current list to your computer system in the required format.

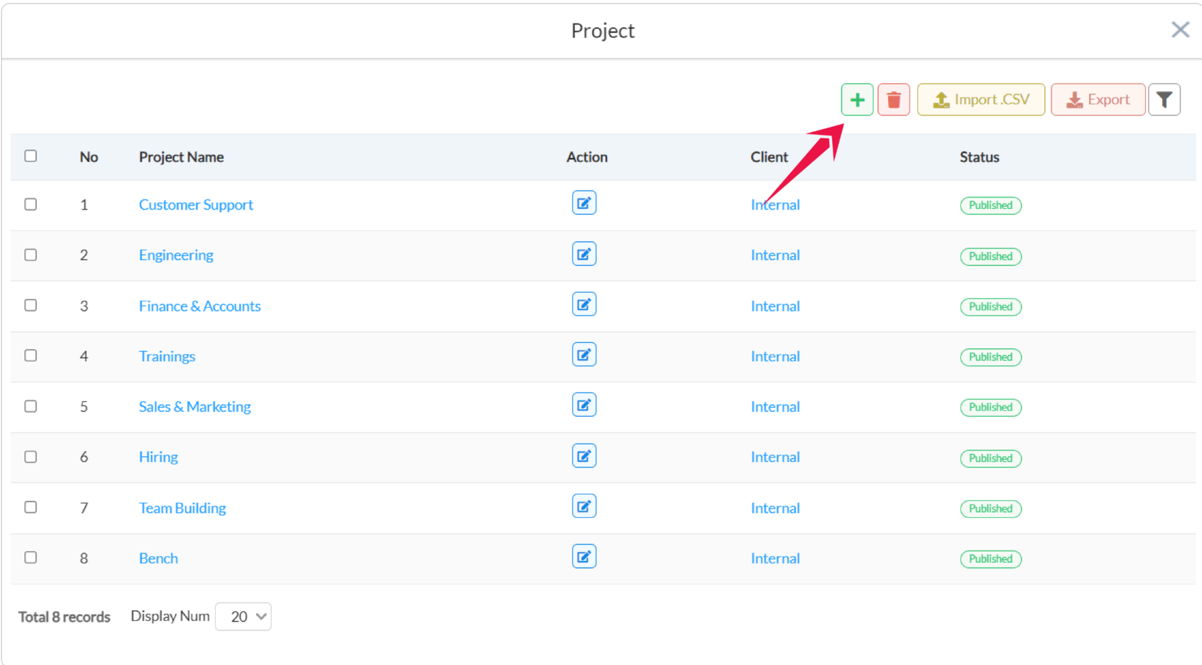
Find and click on the **Funnel** button at the extreme top right corner of this window to filter the page view according to details like:

- Project
- Client
- Project Manager
- Timeline

Click on the **Search** button then to refresh the page view and click on the **Reset** button to go back to the original view.

Additionally, click on the **pen** icon under the Action section of each project to edit its existing details manually.

Close the window once you're done viewing and auditing the details and click **confirm and proceed** to finalise the settings for the projects for now. Then, click **Next** to go to the next step of the DIY setup.



8. Setting Exit Management Process

8.1 Exit Management

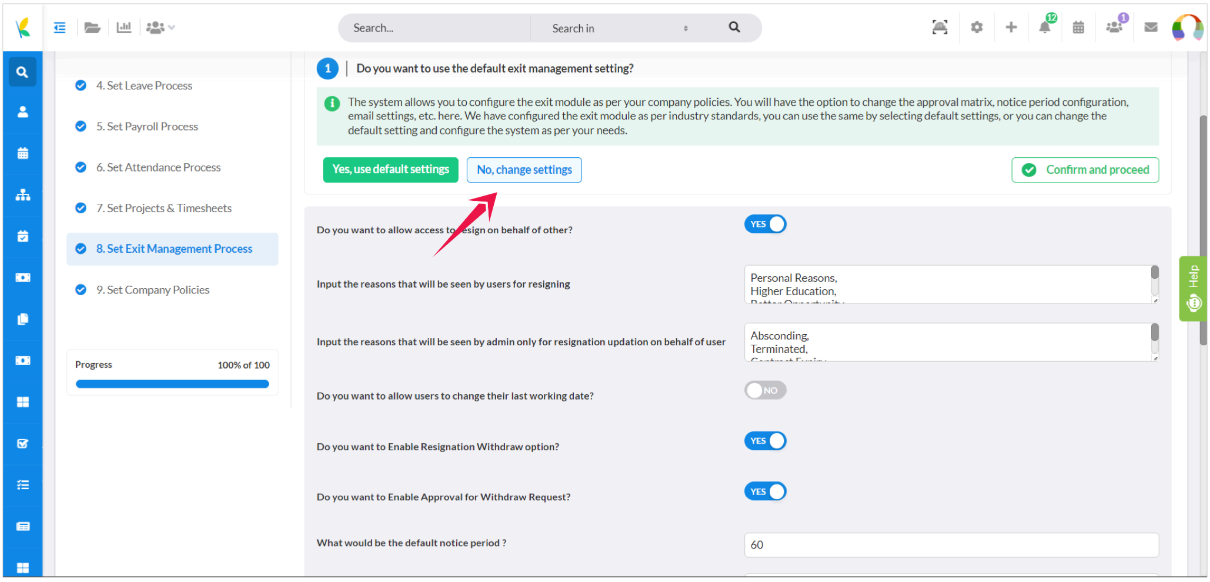
The first section of the exit management process asks you to configure your organisation’s exit management setting.

Click “**Yes, use default settings,**” if you want to continue with the predefined settings in the instance.

Otherwise, select **“No, change settings.”** This option opens a form below. Select the settings like:

- Do you want users to resign or exit on behalf of others?
- Do you want users to give the reason for resigning? If yes, what reasons are allowed?
- Do you want users to be able to change their last working date?
- Can users withdraw their resignation request and/or option?
- For how long would you consider the notice period for the exiting user?

The above bullets are only some of the settings. Use the feature yourself to browse the entire list while setting up the exit management configuration.



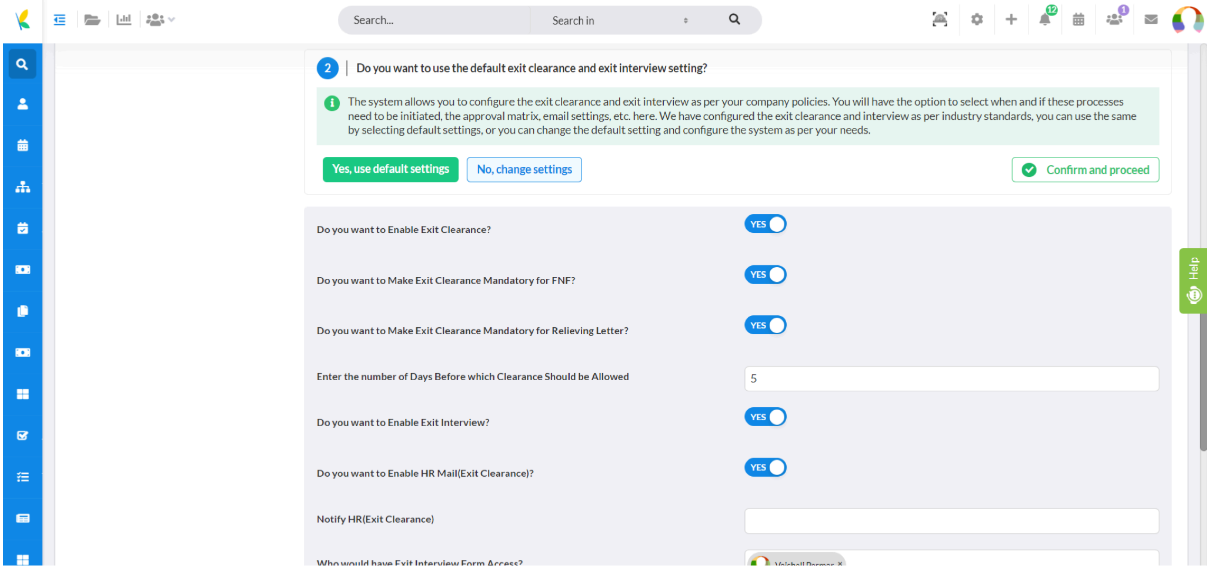
Once done, click **confirm and proceed** to finalise these settings.

8.2 Exit Clearance and Exit Interview

The next section asks you to configure exit clearance and exit interview settings.

Choose “**Yes, use default settings”** if you do not want to make any immediate changes as of now.

Otherwise, click “**No, change settings.”**



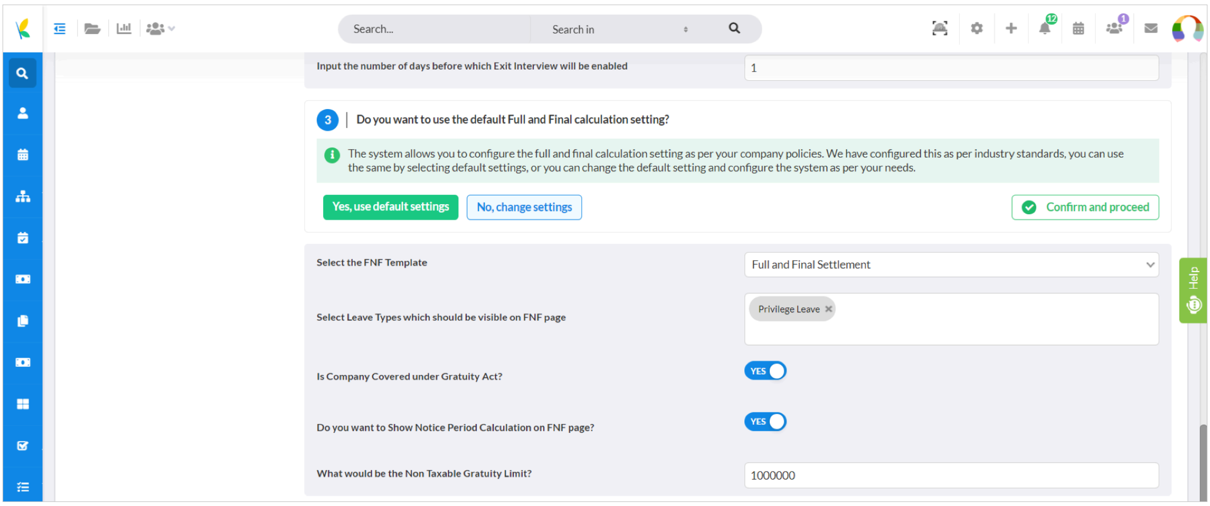
A form will populate below. Check all the settings it provides and configure accordingly. Once done, click **confirm and proceed** to finalise the current settings.

8.3 Full and Final Calculation

Get onto the next section of this page, that is, configuring full and final calculating settings.

Again, use the **“Yes, use default settings”** button if you want to continue with the predefined settings for this stage.

Or else, you can click on “**No, change settings”** to configure the F-n-F further.



A new form populates below. It has questions like:

- Is your company covered under the Gratuity Act?
- Do you want to show the notice period on the F-n-f page?

- Select the F-n-F template from the list
- Leave types to be visible on the F-n-F page

Once you're done configuring it, click on the **confirm and proceed** button to confirm the settings and move ahead.

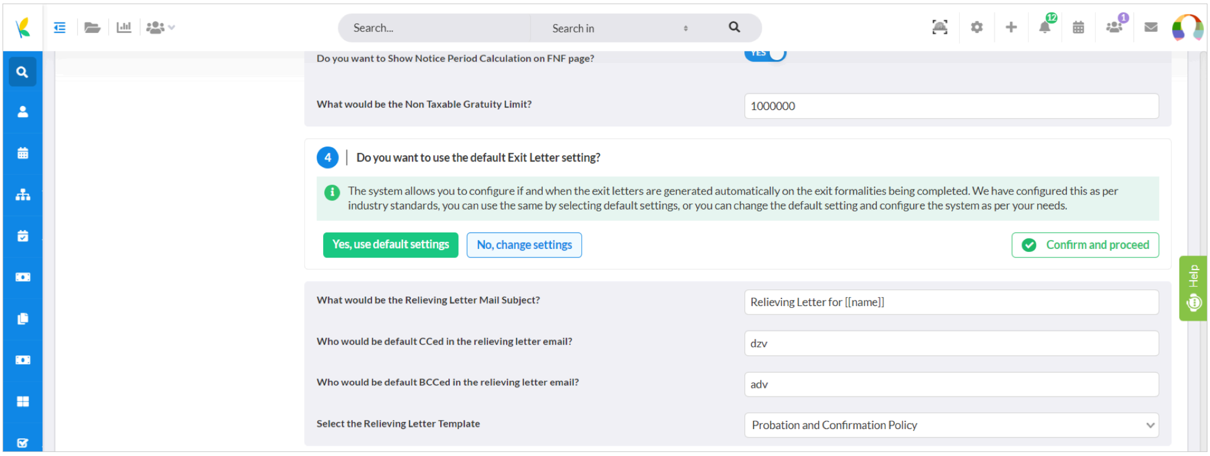
8.4 Exit Letter

Now, you have to configure exit letter settings.

Again, you will get options like "**Yes, use default settings,**" and "**No, change settings.**"

Choose the first one to let the settings be intact and click on **confirm and proceed.**

Otherwise, first click the second button and continue to configure further.



A new form appears below the button for you to configure the exit letter with logical questions like:

- What must be the subject of the relieving letter?
- Who must you CC while sending this?
- Who must you BCC while sending it out?
- Select the relieving letter template from the current drop down menu.

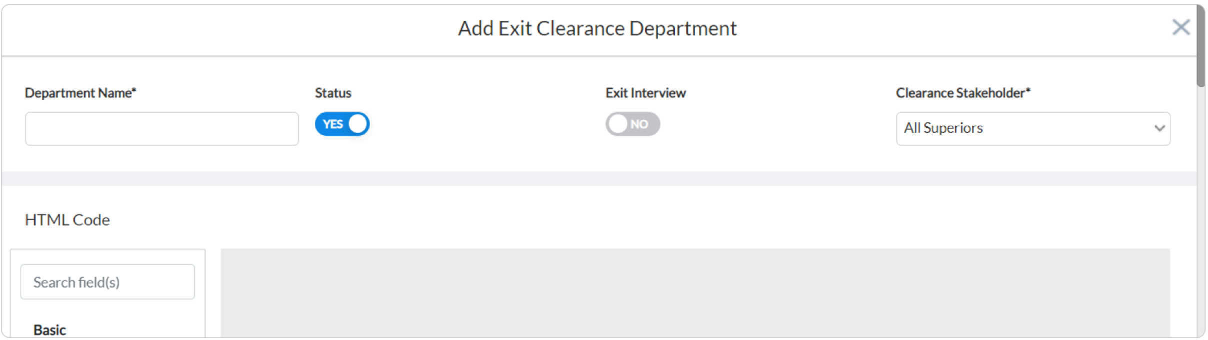
Once done configuring these, click **confirm and proceed** to finalise and move to the last section of this page.

8.5 Exit Clearance Departments

The last section asks you to configure exit clearance departments setup.

Click on the **"Yes, use default setup"** button if you do not wish to configure the setup further.

Click on the **“Add new exit clearance department”** button to add a new department manually.



A new form opens up in a pop-up window.

Add the department name, status, exit interview option, and clearance stakeholder for this department from this form.

Once done, scroll and click **Save**. Then close the window. Otherwise, click **Cancel** to restart.

Over the current list of exit clearance departments predefined in your organisation’s HRMS by clicking on the “**View default departments”** button.

A new pop-up window will appear.

Click on **+ Add Departments** button on the top right corner to add departments for clearances from here.

Click on the **tick mark** under the Action section of each department to get it unpublished.

Click on the **pen** icon next to the tick mark button to edit the current details of the chosen or selected exit clearance department.

Exit Clearance Departments

Search | Search | Reset | + Add Departments

No.	Department Name	Actions	Clearance Stakeholder	Created On
1	Exit Interview Form			14-07-2022
2	Finance Department		Finance Team	15-07-2022
3	IT Department		IT Team	15-07-2022
4	HR Department		HR Manager	30-12-2023
5	Admin Department		Administration Team	30-12-2023

On the top left-hand corner you have the **search bar**. Write down your keywords or key phrases to filter the page after clicking the **Search** button. Go back to the original view by clicking **Reset**.

Close the window after you're done auditing the current list of exit clearance departments. Click on **confirm and proceed** to finalise the details and move onto the final step of the DIY setup process by clicking on the **Next** button.

9. Setting Company Policies

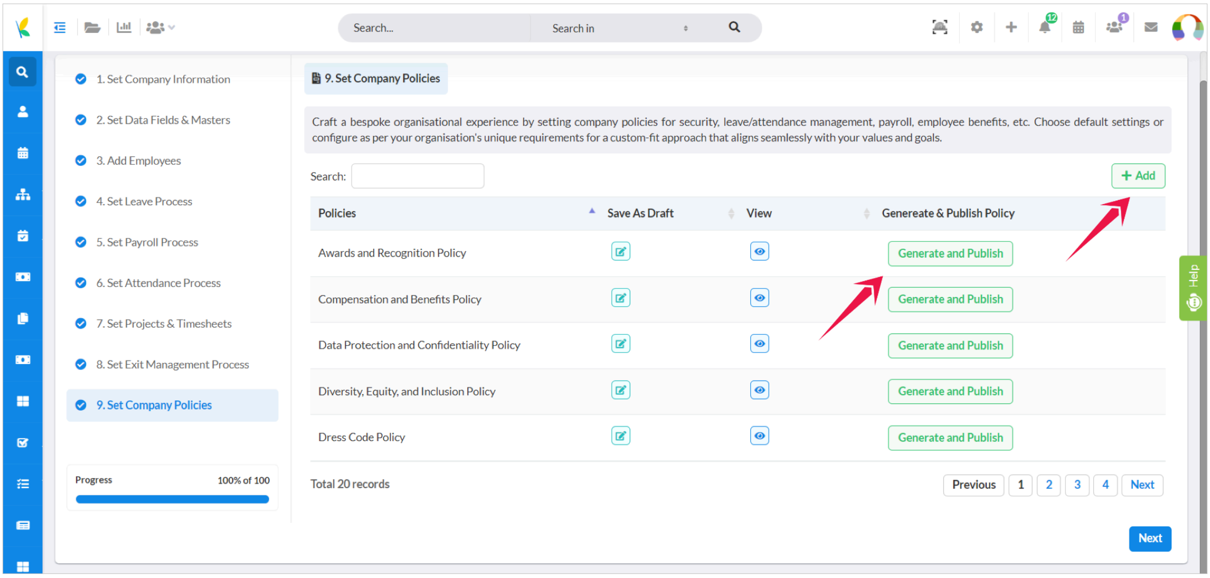
This is the last step of the DIY setup process. The page will highlight all the currently existing policies as Drafts in a tabular format.

9.1 Policies

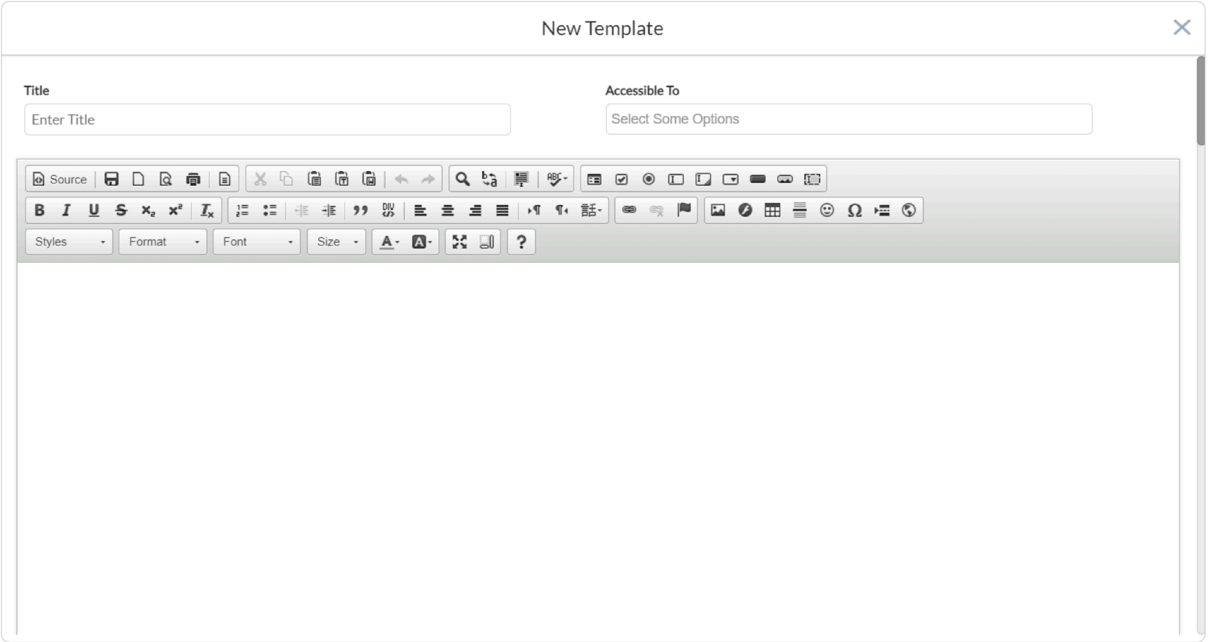
Click on the **pen** icon in front of each policy to edit the details of the same. The button will take you to their respective pages in a new window.

By clicking the **eye** button under the View section on this table, you will be redirected to the policy page to view its details.

Once you're done finalising each policy that you want in your organisation, click on the **Generate and Publish** button.



Find the **+ Add** button at the top right corner of this table to add new policies. When you click on it, a new window will appear that lets you add the **Title of the policy**, **Accessible to** option, and then the editor space to continue writing and editing the policy.



Scroll down on this page to know all the codes and literals to add in the policy.

Once you're done, click **Save** and close the window. Otherwise, click **Cancel** and restart the process of writing and adding a new policy draft.

Now click on the **Next** button and voila! You're done with the DIY setup and you can continue using uKnowva HRMS for streamlining your internal workflows seamlessly by clicking on the **Go to Home Page** button reflected on the centre of the screen.

Congrats! You've reached the end of the DIY manual.

We hope it was helpful to you.

For any queries & next steps, reach out to us:

- docs.uknowva.com/bot
- docs.uknowva.com
- forums.uknowva.com
- helpdesk@uknowva.com

Always happy to help,

Team uKnowva