NepalHRM Training Manual.

A role-based curriculum your team can self-pace after the live training sessions on Day 5 of onboarding. Five learning tracks, 21 lessons, each one with hands-on exercises and a knowledge check. Re-usable indefinitely for future hires.

How to use this manual

1. Find your role under **Learning paths** and follow the lessons in order.
2. Every lesson has a **hands-on exercise** on your real workspace — finish it before moving on.
3. Check the **knowledge check** at the end of each lesson; if you can't answer it, redo the exercise.
4. The **cheat sheets**, **scenarios**, and **glossary** are for ongoing reference — keep them bookmarked.
5. After completing your track, request **certification** from your HR Admin — it's a 10-minute online check.

1. Learning paths

Pick the track that matches your role. Estimates assume self-paced study with practice on your real workspace.

HR Admin

REQUIRED

For HR managers and HR executives who run the workspace

6 lessons **~ 5 hours** **Certification** required

1. Navigating the workspace
2. Employee lifecycle
3. Leaves & attendance
4. Performance & disciplinary
5. Reports & audit log
6. Configuration & permissions

Payroll Officer

REQUIRED

For finance / payroll team running the monthly payroll cycle

4 lessons **~ 4 hours** **Certification** required

1. Salary structures & components
2. The monthly payroll cycle
3. PF / CIT / SSF / eTDS outputs
4. Loans, advances, reimbursements

People Manager

RECOMMENDED

For line managers and department heads

3 lessons **~ 90 min** Light certification

1. Approving leaves & overtime
2. Team attendance & performance
3. Helpdesk & announcements

RECOMMENDED

Employee (everyone)

For every employee on the platform

2 lessons **~ 30 min** No certification

1. Mobile app & self-service basics
2. Leaves, payslips & reimbursements

OPTIONAL

IT / Systems Admin

For IT contact during onboarding and ongoing systems work

3 lessons **~ 2 hours** Light certification

1. Biometric devices & mappings
2. SSO, permissions & access control
3. Email deliverability & integrations

OPTIONAL

Train-the-Trainer

For your in-house champion who'll onboard new hires

3 lessons **~ 2 hours** Light certification

1. Re-running employee orientation
2. Capturing exceptions & edge cases
3. Knowing when to escalate to NepalHRM

2. HR Admin track

The most comprehensive track. Complete in order — later lessons assume earlier ones.

LESSON HRA-1

45 min

Navigating the workspace

LEARNING OBJECTIVES

- Sign in, switch between admin and personal views, and reset your password.
- Identify the five module groups on the sidebar (People, Time & Attendance, Payroll, Workplace, Administration).
- Open the global search and find any employee, ticket, or document in under 5 seconds.
- Read the dashboard tiles and know which one drives which action.

CONTENT OUTLINE

- The sidebar layout and module toggles.
- Top bar: search, notifications, profile menu.
- Dashboard widgets and what each one tells you.
- Audit log entry every time you make a change — what gets recorded.

HANDS-ON EXERCISE

1. Sign in to your workspace.
2. Use the global search (`Cmd` + `K` or `Ctrl` + `K`) to find your own employee record.
3. Open the Notifications panel and dismiss one item.
4. Switch to the Employee Self-Service view and look at your own dashboard, then return to Admin.

Knowledge check: Which module group contains "Loans"? (Answer: Payroll & Finance.) Where does the audit log live? (Administration → Audit Log.)

LESSON HRA-2

60 min

Employee lifecycle — hire to exit

LEARNING OBJECTIVES

- Add a single new employee end-to-end.
- Run a bulk CSV import.
- Trigger an onboarding workflow and watch it complete.
- Process a resignation through Offboarding to clearance.

CONTENT OUTLINE

- Employee record structure: profile, employment, salary, leave balances, documents.
- Onboarding stages — sequence, owners, tasks.
- Resignation → Offboarding flow, exit interview, asset return.
- Re-hire vs new hire — when to use which.

HANDS-ON EXERCISE

1. Add a sandbox employee "Test Hire 1" with today's hire date.
2. Trigger the default onboarding workflow on that employee.
3. Complete one onboarding task as the employee, one as HR.
4. Submit a resignation for the same employee, then process offboarding to "Cleared".
5. Delete the sandbox record after.

Knowledge check: Which field controls who sees the employee in their team list? (Answer: `manager_id`.) What gets blocked if Offboarding isn't completed? (Hint: payroll lock + asset clearance.)

LESSON HRA-3

Leaves & attendance — the daily ops

60 min

LEARNING OBJECTIVES

- Approve and reject leave requests with one click.
- Regularise a missed punch.
- Understand the Daily, Period and Summary attendance views.
- Edit leave balances when needed (and why you usually shouldn't).

CONTENT OUTLINE

- Leave types, accrual, and approval chains.
- Attendance: biometric vs web vs mobile vs manual source.
- "Unmapped employees" pill — what it means, how to fix it.
- Bulk regularisation for date ranges.

HANDS-ON EXERCISE

1. Find a pending leave request and approve it.
2. Open Attendance / Daily and identify one row with a missing checkout.
3. Regularise that row with a note.
4. Open the Attendance Summary and export it to Excel.

Knowledge check: If the Unmapped pill shows 5, what's the fix? (Answer: open Devices & Mapping, link 5 employees to their device IDs.)

LESSON HRA-4

45 min

Performance & disciplinary

LEARNING OBJECTIVES

- Set up a performance period with objectives and reviews.
- Record a disciplinary action with proper documentation.
- Use the timeline view to see history per employee.

CONTENT OUTLINE

- Performance periods: mid-year, annual.
- Objectives, KPIs, status flow (not started → in progress → completed).
- Reviews: self, manager, calibration.
- Disciplinary types and the verbal-written-final-termination ladder.

HANDS-ON EXERCISE

1. Open a sandbox employee, set up one objective with a due date.
2. Move the objective from "Not started" to "In progress".
3. Add a verbal-warning disciplinary action (with reason), then archive it.

Knowledge check: Who can edit a disciplinary record once created? (Answer: only HR Admins, and every edit is audit-logged.)

LESSON HRA-5

45 min

Reports & audit log

LEARNING OBJECTIVES

- Run the standard headcount, attendance and leave reports.
- Filter by date range, department, location.
- Export to Excel for distribution.
- Read the audit log to investigate a change.

CONTENT OUTLINE

- Standard report library.
- Filters, comparisons period-over-period.
- Saved reports and scheduling (weekly auto-email).
- Audit log filters: by user, by entity type, by date range.

HANDS-ON EXERCISE

1. Run a headcount report for last month, group by department.
2. Export to Excel.
3. Open the audit log, filter by "user: yourself" — confirm your actions appear.

Knowledge check: How do you investigate "who changed the leave balance of employee X"? (Answer: Audit Log → filter entity = LeaveBalance, search by employee.)

LESSON HRA-6

60 min

Configuration & permissions

LEARNING OBJECTIVES

- Create a new department, designation, location.
- Define a new leave type and policy.
- Add a user with the right role and permissions.
- Toggle modules on/off without breaking active workflows.

CONTENT OUTLINE

- Permission groups: HR Admin, Payroll Officer, Manager, Employee.
- Custom roles for unusual cases.
- Module toggles — what they do and what they don't.
- Settings → Company: legal name, PAN, timezone, locale.

HANDS-ON EXERCISE

1. Create a sandbox department "Test Dept".
2. Add a sandbox user with the Manager role on Test Dept.
3. Sign in as that user (private window) and confirm they can see only their team.
4. Delete the sandbox user and department.

Knowledge check: What happens if you turn off the Performance module mid-cycle? (Answer: existing data is preserved, the module just hides from the sidebar; can be re-enabled any time without data loss.)

3. Payroll Officer track

Run the monthly payroll, generate government returns, manage advances and loans.

LESSON PAY-1

60 min

Salary structures & components

LEARNING OBJECTIVES

- Read a salary structure end-to-end.
- Create a new structure with basic + allowances + deductions.
- Add PF, CIT and SSF components with correct percentages.
- Assign a structure to an employee and verify the next payslip.

CONTENT OUTLINE

- Salary components: types (earning / deduction / employer contribution).
- Calculation formulas (% of basic, fixed amount, formula-based).
- PF (10% + 10%), CIT, SSF, festival bonus rule.
- Versioning — every revision creates a new structure version.

HANDS-ON EXERCISE

1. Open an existing structure and read every component aloud.
2. Clone it as "Sandbox Structure".
3. Add a custom "Meal Allowance" of NPR 1,000.
4. Assign to a sandbox employee, run a preview payslip, confirm the NPR 1,000 appears.

Knowledge check: Which salary components contribute to PF base? (Answer: configurable per component — usually just Basic. Check each component's "PF applicable" flag.)

LESSON PAY-2

75 min

The monthly payroll cycle

LEARNING OBJECTIVES

- Create a payroll period and lock it at the right moment.
- Run payroll, review variances vs last month, approve, and publish.
- Generate the bank file in the format your bank accepts.
- Handle late-arriving attendance corrections (post-publish).

CONTENT OUTLINE

- Period states: Draft → Locked → Approved → Paid.
- Variance analysis vs previous period.
- Bank file formats (NIC Asia, Nabil, NMB).
- Off-cycle runs for terminations and corrections.

HANDS-ON EXERCISE

1. Open the latest payroll period.
2. Run a preview, inspect the variance report for outliers.
3. Drill into one employee with >NPR 5,000 variance vs last month — find the cause.
4. Approve the period (do not publish in training).

Knowledge check: An employee resigned on the 12th — how do you handle their last payroll? (Answer: off-cycle final-settlement run, computes pro-rated salary + leave encashment + final dues.)

LESSON PAY-3

45 min

PF / CIT / SSF / eTDS outputs

LEARNING OBJECTIVES

- Generate each government return file from a closed payroll period.
- Validate the file before submission.
- Know the submission deadlines for each return.
- Re-generate a return if data changes after first export.

CONTENT OUTLINE

- PF: EPF Office monthly return file format.
- CIT: Citizen Investment Trust contribution report.
- SSF: SSF return + employer contribution split.
- eTDS: Annexure-10 ready, FY-aware (Shrawan to Ashad).

HANDS-ON EXERCISE

1. Open a closed payroll period.
2. Download each of the four government returns.
3. Open the PF file and confirm the total matches the on-screen "PF Employer Contribution" tile.

Knowledge check: When is the eTDS file based on the Nepali Fiscal Year vs the calendar year? (Answer: always Nepali FY — Shrawan 1 to Ashad end.)

LESSON PAY-4

45 min

Loans, advances & reimbursements

LEARNING OBJECTIVES

- Create a loan with EMI schedule.
- Approve an advance request.
- Process a reimbursement claim with receipts.
- See how each one flows into the next payroll automatically.

CONTENT OUTLINE

- Loan types, interest rules, EMI generation.
- Advances vs loans — when to use which.
- Reimbursements: receipt upload, manager approval, payment trail.
- How each component appears on the payslip.

HANDS-ON EXERCISE

1. Create a sandbox loan: NPR 50,000, 10 EMIs, zero interest.
2. Confirm 10 EMI entries auto-generate.
3. Approve a pending reimbursement claim.
4. Run a preview payslip to see both components reflected.

4. Manager track

Quick — most managers complete this on their phone during a coffee break.

LESSON MGR-1

30 min

Approving leaves & overtime

LEARNING OBJECTIVES

- See your team's pending requests on the mobile app and web.
- Approve, reject, or request more info — with a note.
- Understand what happens after you approve.

HANDS-ON EXERCISE

1. Open the mobile app → My Approvals.
2. Approve one pending leave request with a note.
3. Confirm the requester gets a notification (ask them or check the email).

LESSON MGR-2

30 min

Team attendance & performance

LEARNING OBJECTIVES

- Open your team's attendance for the week and the month.
- Spot patterns: late, absent, missing checkout.
- Conduct a quick performance check-in within the platform.

HANDS-ON EXERCISE

1. Open Attendance → My Team (current week).
2. Find one row with a late tag, click in, read the comment.
3. Schedule a 15-min check-in with that employee from the Performance module.

LESSON MGR-3

20 min

Helpdesk & announcements

LEARNING OBJECTIVES

- Respond to a team member's helpdesk ticket.
- Post an announcement to your department.
- Use Messages to start a 1-1 with HR.

HANDS-ON EXERCISE

1. Post a one-line announcement to your team ("Test post — please ignore").
2. Delete it.

5. Employee track

Two short lessons. Cover them in the orientation video on Day 5; this manual is the written reference.

LESSON EMP-1

15 min

Mobile app & self-service basics

LEARNING OBJECTIVES

- Download & sign in to the mobile app.
- Clock in / out (if applicable to your shift).
- Update your personal profile (phone, address, emergency contact).
- Find your payslip, leave balance and team announcements.

HANDS-ON EXERCISE

1. Install **NepalHRM** from the App Store / Play Store.
2. Sign in with your work email.
3. Open My Profile → confirm your phone number is correct.
4. Open Payslips → download your latest one.

LESSON EMP-2

15 min

Leaves, payslips & reimbursements

LEARNING OBJECTIVES

- Apply for leave with the right type and balance shown live.
- Download payslips for any past month.
- Submit a reimbursement claim with a photo of the receipt.
- Raise a helpdesk ticket when you need HR's help.

HANDS-ON EXERCISE

1. Apply for a sandbox half-day casual leave for next month.
2. Cancel the sandbox application.
3. Submit a sandbox reimbursement of NPR 100 with any photo.
4. Cancel the sandbox reimbursement.

Tip: Push notifications need to be turned on. iPhone → Settings → Notifications → NepalHRM. Android → App info → Notifications.

6. IT / Systems Admin track

For your IT lead. Pre-requisite is that the workspace is already provisioned.

LESSON IT-1

45 min

Biometric devices & mappings

LEARNING OBJECTIVES

- Add a new device by serial number.
- Test connectivity and resolve firewall issues.
- Map employees to device IDs (bulk and individual).
- Read the device health page.

HANDS-ON EXERCISE

1. Open Attendance → Devices & Mapping.
2. Verify all your devices show "Online" in the last 5 minutes.
3. Map one previously unmapped employee.

Time-drift gotcha: If a device's clock is wrong by more than 2 hours, punches won't be accepted. Sync the device's clock via its admin panel before pairing.

LESSON IT-2

45 min

SSO, permissions & access control

LEARNING OBJECTIVES

- Enable Google Workspace or Microsoft Entra SSO.
- Map SSO groups to NepalHRM permission groups.
- Force MFA on admin accounts.
- Audit who has admin access.

LESSON IT-3

30 min

Email deliverability & integrations

LEARNING OBJECTIVES

- Configure SPF, DKIM, DMARC for outbound payslip email from your domain.
- Set up the API key for integrations (Slack, accounting).
- Review webhook deliveries when something fails.

Why bother: Domain auth is the single biggest fix for "employees aren't receiving payslip emails". One-time setup, permanent payoff.

7. Cheat sheets

One-page references to print and stick on the wall.

Keyboard shortcuts

`Cmd` + `K`	Global search
`G` then `D`	Go to Dashboard
`G` then `E`	Go to Employees
`G` then `A`	Go to Attendance
`G` then `P`	Go to Payroll
`?`	Show all shortcuts
`N`	New (employee / leave / etc.)
`Esc`	Close modal / clear search

Payroll cycle (per month)

Day 25	Cut-off: final attendance corrections
Day 26	Lock period · review variances
Day 27	Approve · generate bank file
Day 28	Bank transfer · publish payslips
Day 1–5 (next mo.)	File PF / CIT / SSF / eTDS

Leave types & defaults

Annual	12 days · yearly upfront · CF up to 6
Sick	12 days · yearly upfront · no CF
Casual	6 days · yearly upfront · no CF
Maternity	98 days · per event · paid
Paternity	15 days · per event · paid
LWP	Loss of pay · unlimited · zero-pay days

PF / CIT / SSF at a glance

PF — Employee	10% of Basic
PF — Employer	10% of Basic
CIT	Configurable per employee (max 1/3 of salary)
SSF — Employee	11% (typical, configurable)
SSF — Employer	20% (typical, configurable)
eTDS slabs	FY-aware, auto-updated each Shrawan 1

Support response times

P1 (Scale)	1 hour · 24×7 phone
P1 (Growth)	4 working hours
P2 standard	Next business day
P3 minor	2 business days
Feature request	Logged, prioritised quarterly

Common URLs

App	`yourcompany.nepalhrm.com`
Status	`status.nepalhrm.com`
Help	`help.nepalhrm.com`
Support	support@nepalhrm.com
Sales	sales@nepalhrm.com

8. Common scenarios — start-to-finish

Six real situations your team will hit. Step-by-step.

SCENARIO A

A new employee joins on the 15th of the month

> Given: hire date in the middle of a payroll period, salary structure already exists.

1. HR Admin → Employees → New Employee. Fill profile, employment, salary.
2. Trigger the default Onboarding workflow.
3. Run a preview payslip — confirm pro-rated salary for 16 days.
4. Invite the employee to the mobile app from their record.
5. Confirm their leave balance auto-pro-rates per policy.

SCENARIO B

An employee resigns mid-cycle

> Given: resignation submitted, last working day in 30 days.

1. HR Admin → Resignations → accept the request, set last working day.
2. System triggers Offboarding workflow: asset return, clearance checklist.
3. On the last working day, run final-settlement payroll: pro-rated salary + unused-leave encashment + dues.
4. Generate experience certificate from the Documents module.
5. Mark Offboarding Complete — employee record archives.

SCENARIO C

A manager goes on leave for 2 weeks

> Given: pending approvals would pile up.

1. HR Admin → Permissions → set a temporary delegate on the manager's approval queue.
2. Delegate inherits the queue automatically.
3. Manager returns → HR removes the delegation.

SCENARIO D

Payroll variance investigation

> Given: one employee's salary is NPR 8,000 higher than last month.

1. Open the employee's payslip preview.
2. Use the "Compare to previous period" button — system highlights changed components.
3. Cause is typically: missed overtime last month, salary revision, festival bonus.
4. Confirm with the audit log → who changed what, when.

SCENARIO E

Biometric device goes offline

> Given: device hasn't sent punches for 6 hours.

1. Open Attendance → Devices & Mapping → identify the offline device.
2. Notify IT (in-app helpdesk → IT category).
3. IT restarts the device / restores network.
4. Punches backfill from the device's internal log automatically once it reconnects.
5. HR confirms reconciled attendance the next morning.

SCENARIO F

Audit / compliance request from the auditor

> Given: auditor wants to see all salary changes in the last year.

1. Administration → Audit Log → filter entity = SalaryStructure / EmployeeSalary, date range = last 12 months.
2. Export to Excel.
3. Each row shows: who, what, when, before-and-after value.
4. Send the Excel directly to the auditor.

9. Glossary

Terms used inside NepalHRM and what they actually mean.

TERM	DEFINITION
Active employee	An employee whose status is Active (not Resigned / Terminated / On Hold). Billing is based on the count of active employees on the last day of the month.
Approval chain	The ordered list of approvers a request (leave, overtime, reimbursement) flows through before being final-approved.
Audit log	The append-only record of every create / update / delete on a sensitive object. Captures user, IP, timestamp, before- and after-value.
Cut-off	The date in the payroll cycle after which attendance corrections are no longer accepted. Default: 25th.
CF (Carry forward)	Unused leave balance that rolls over into the next year. Configurable cap per leave type.
DeviceEmployeeMapping	The link between a biometric device's employee ID and a NepalHRM employee record. Required for biometric punches to land in the right person's attendance.
eTDS	Electronic Tax Deduction at Source. Generated as Annexure-10 file from each closed payroll period.
FY	Nepali Fiscal Year, Shrawan 1 to Ashad end (mid-July to mid-July).
Hypercare	The first 30 days post-go-live during which the Implementation Lead is on a dedicated WhatsApp channel.
LWP	Leave Without Pay. Counts as zero-pay days in payroll.
Off-cycle run	A payroll run outside the standard monthly cycle — used for terminations, corrections, festival bonus.
Regularisation	HR / manager correction of an attendance row that's missing a punch.
Source (of punch)	Where a punch came from: biometric, web, mobile, manual, regularized. Visible per row on the Attendance page.

TERM	DEFINITION
Unmapped employee	An active employee not linked to any biometric device. Their punches can't be auto-attributed. Surfaced as a pill on the Attendance / Daily tab.
Variance	The difference between this period's value and the previous one. Used in payroll review to spot outliers.

10. Certification

A short check that confirms your team can run their part of the platform unaided.

NepalHRM Operator Certification

After completing your track, take the 10-minute online certification. Results delivered immediately; certificate emailed to you and your HR Admin.

- **HR Admin** — 20 questions covering all 6 lessons, plus 2 practical scenarios. Pass: 80%.
- **Payroll Officer** — 15 questions + 1 practical reconciliation exercise. Pass: 85%.
- **People Manager** — 10 questions, mostly multiple-choice. Pass: 70%.
- **IT / Systems Admin** — 12 questions on devices, SSO, deliverability. Pass: 75%.

How to request the test: Email support@nepalhrm.com with subject `Certification request – <track>`. We send the link within one working day. Certificates are valid for 12 months; recertification offered free.
