EPICHRM

EPICHRM USER MANUAL

The next right click, made obvious.

A practical guide for employees, managers, HR teams and company admins. Start with your role, then follow the workflow you need today.

EpicHRM keeps the high-frequency work close: today’s attendance, what needs your decision and the records you need to finish the day.

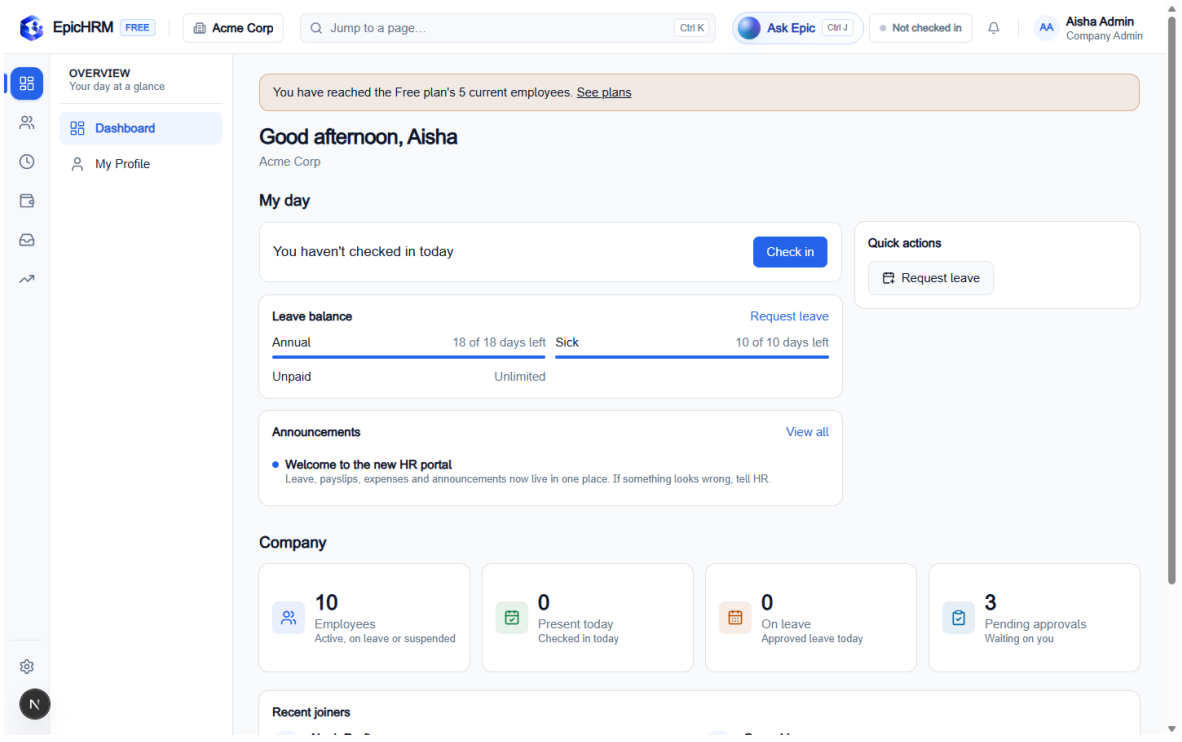
Roles at a glance

Employee	Manager	HR manager	Company admin
Check in, request leave, read payslips, submit expenses and manage personal documents.	See the reporting line, team attendance and requests waiting on you.	Run employees, attendance, leave, payroll, documents and reports.	Set up the company, invite people, configure access and manage the plan.

GETTING STARTED

Set up the company once, then invite the people who make it work.

1. **Create the company.** Sign up, verify the owner email and enter the company name, country, time zone and currency.
2. **Complete the checklist.** Add branches, departments, designations, shifts and holidays before inviting everyone.
3. **Invite people.** Under Administration - Users, invite the person using the email they will use to sign in, then assign the right role.
4. **Switch companies.** If you belong to more than one company, use the company menu at the top of the page.



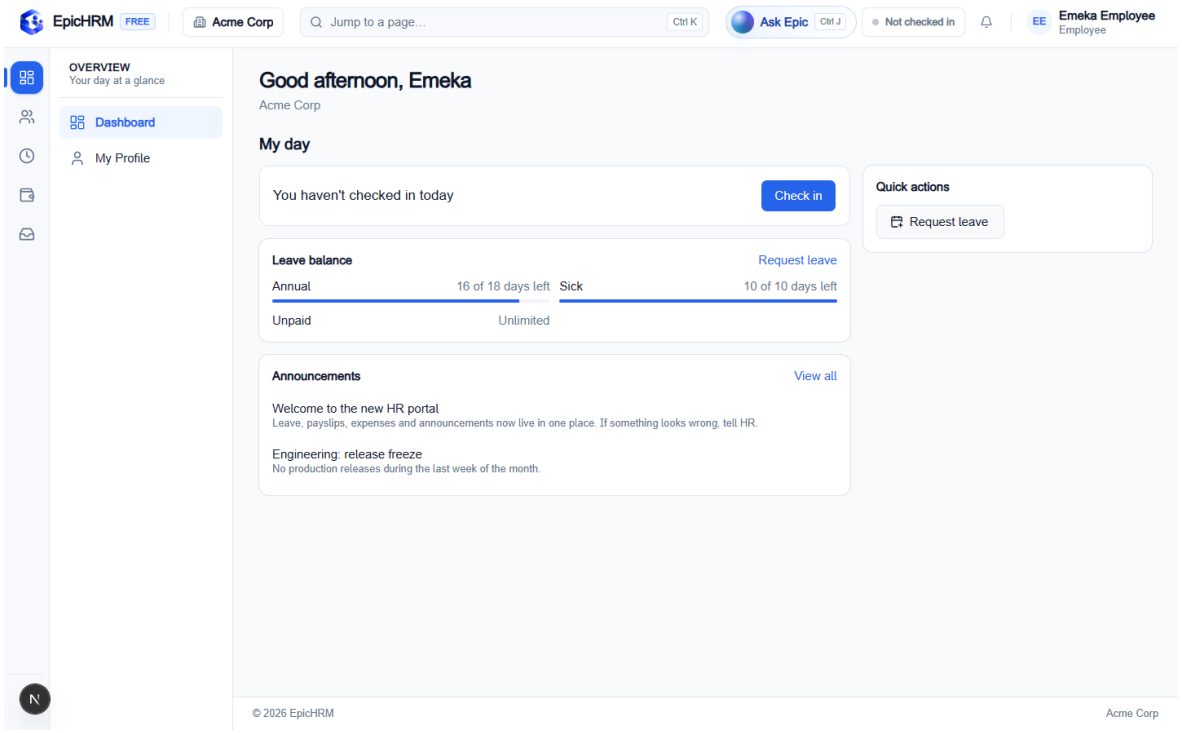
The dashboard keeps the setup checklist and today's work visible.

THE DAILY LOOP

Open. Check in. Act. Leave.

- Add a passkey under Profile - Passkeys before your first check-in.
- Check in and check out from the dashboard, confirming each punch with your passkey.
- Use Leave for time off, Expenses for claims and the bell for decisions or published payslips.

• The mobile app keeps the last good read-only data available when the connection drops and shows an offline banner.



Employees see their day, balance, latest payslip, announcements and quick actions.

EMPLOYEE WORKFLOWS

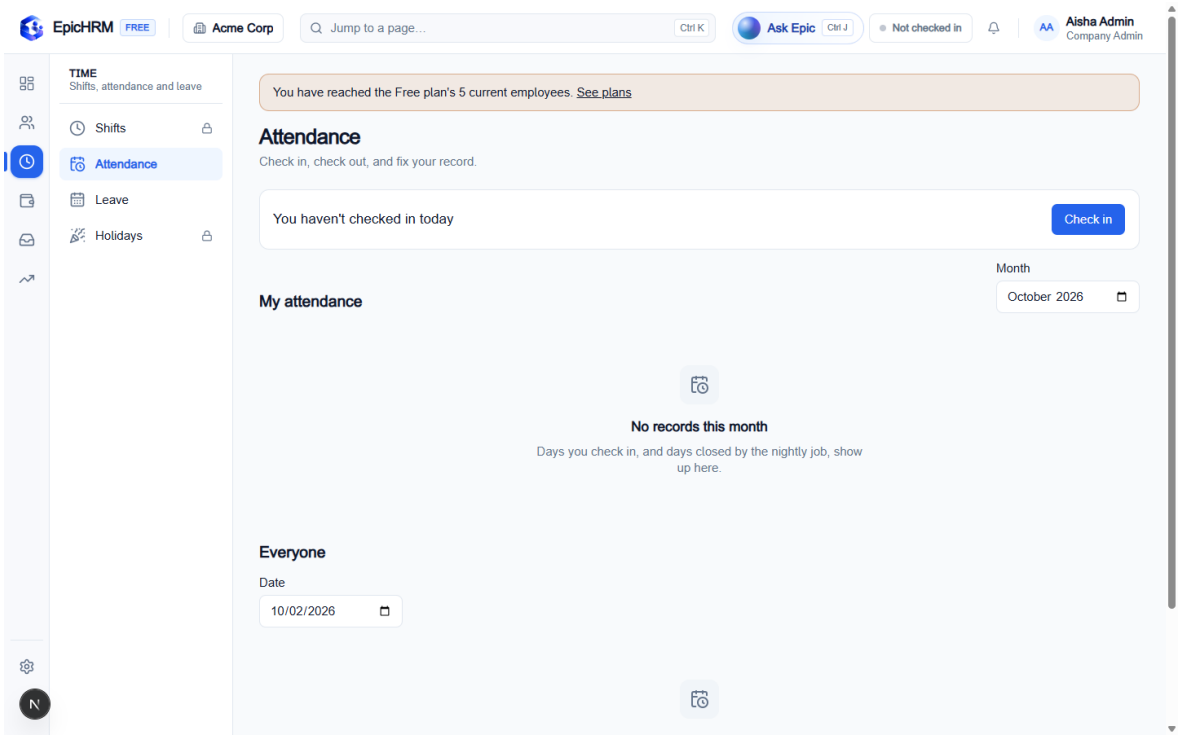
Finish the work that belongs to you.

Attendance

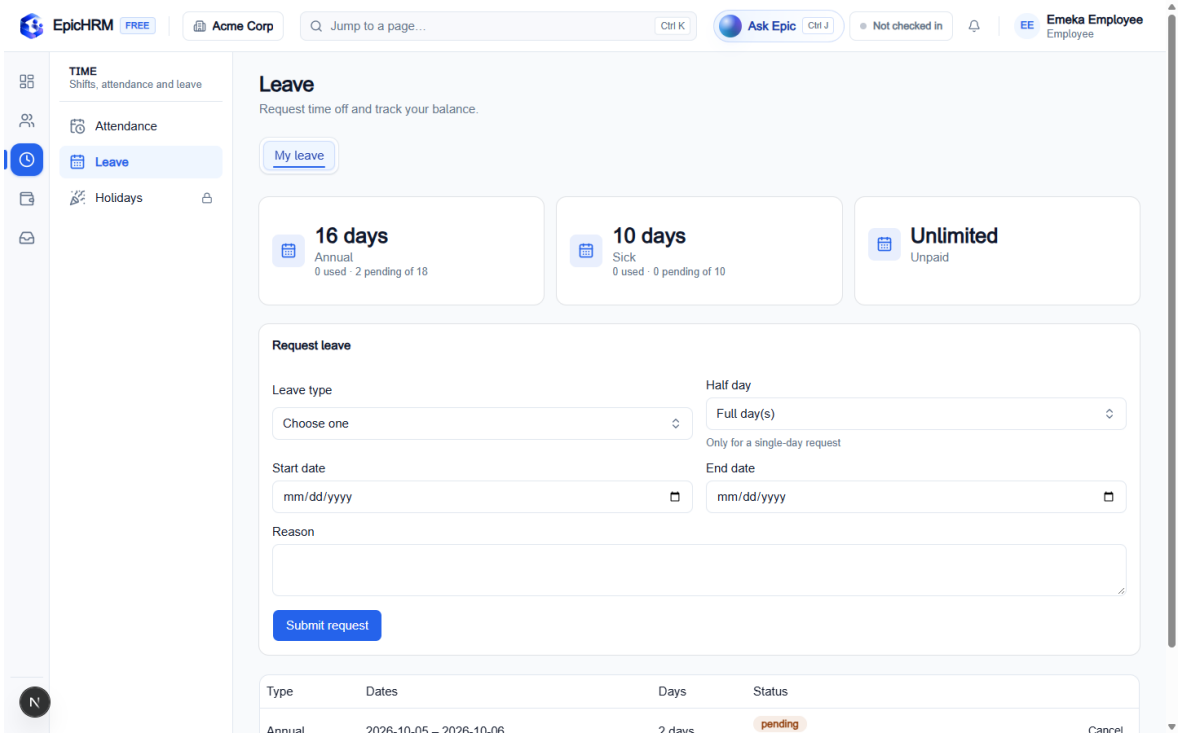
1. **Add a passkey.** Open Profile - Passkeys and use Face ID, fingerprint, Windows Hello or your device PIN.
2. **Check in.** Choose Check in on the dashboard and confirm the fresh passkey prompt.
3. **Request a correction.** If you forgot a punch, open Attendance - My attendance and request a correction on Pro and above.

Leave and expenses

1. **Choose a type.** Select a leave type or expense category. Leave balances skip weekends and company holidays.
2. **Add the detail.** Choose dates and add a note, or attach the receipt to an expense claim.
3. **Submit and follow it.** The request moves through its approval chain. A pending leave request can be cancelled.



Attendance shows daily status, check-in and check-out, late minutes and correction requests.



Leave keeps balances, requests and statuses together.

PEOPLE AND APPROVALS

Keep the organization current and make decisions in the right place.

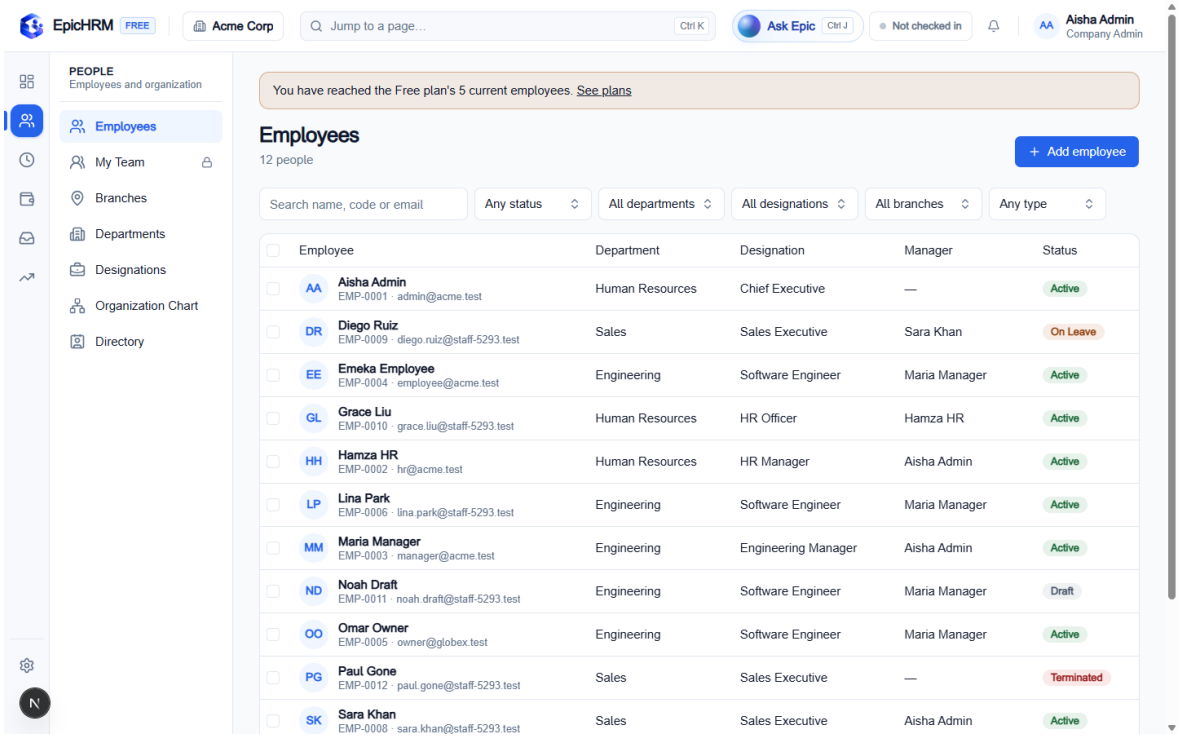
People

• Create branches, departments and designations before building the organization chart.

• Add an employee through personal details, employment, access and review. Save a draft when the record is incomplete.

• Use profile tabs for job, payroll, attendance, leave, documents and history.

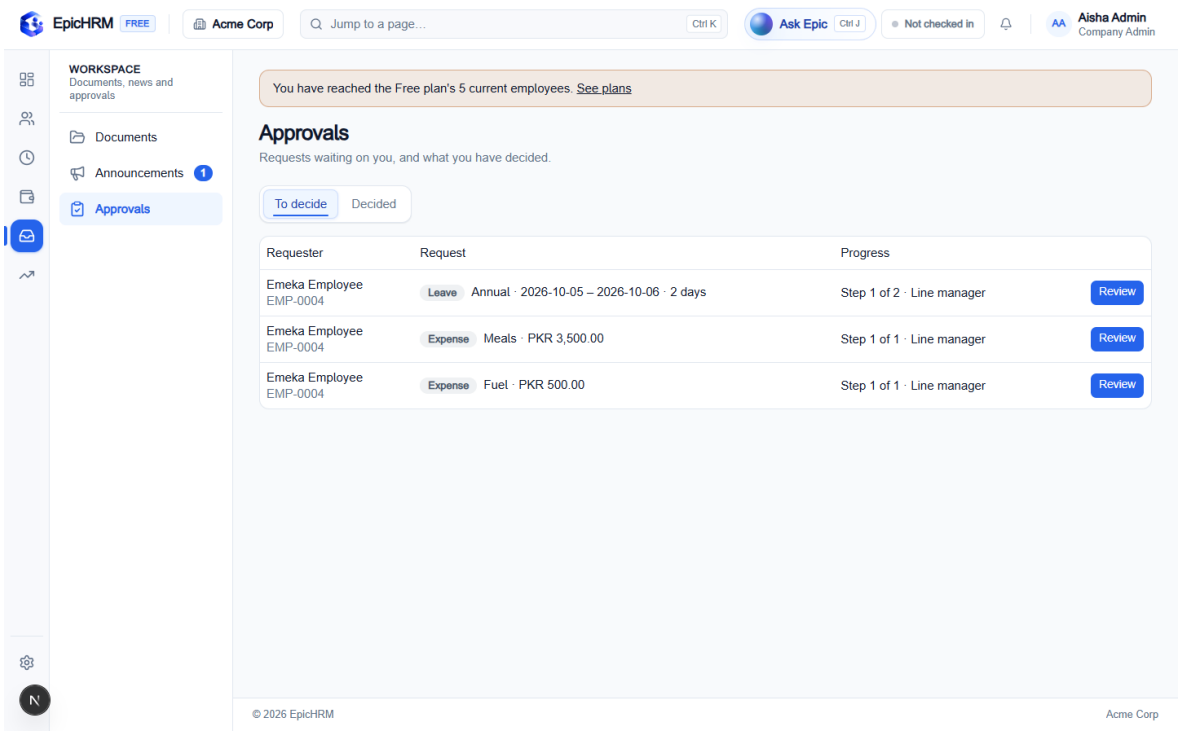
• Reassign direct reports before terminating someone; termination deactivates their login.



Search employees by status, department, designation, branch and employment type.

Approvals

1. **Open Approvals.** Leave requests, expense claims and attendance corrections arrive in one inbox.
2. **Read the chain.** Review the person, dates or amount, comments and who has already decided.
3. **Approve or reject.** Add an optional comment. The next approver is notified automatically.
4. **Configure workflows.** On Pro and above, use Administration - Approval Workflows for multi-step chains.



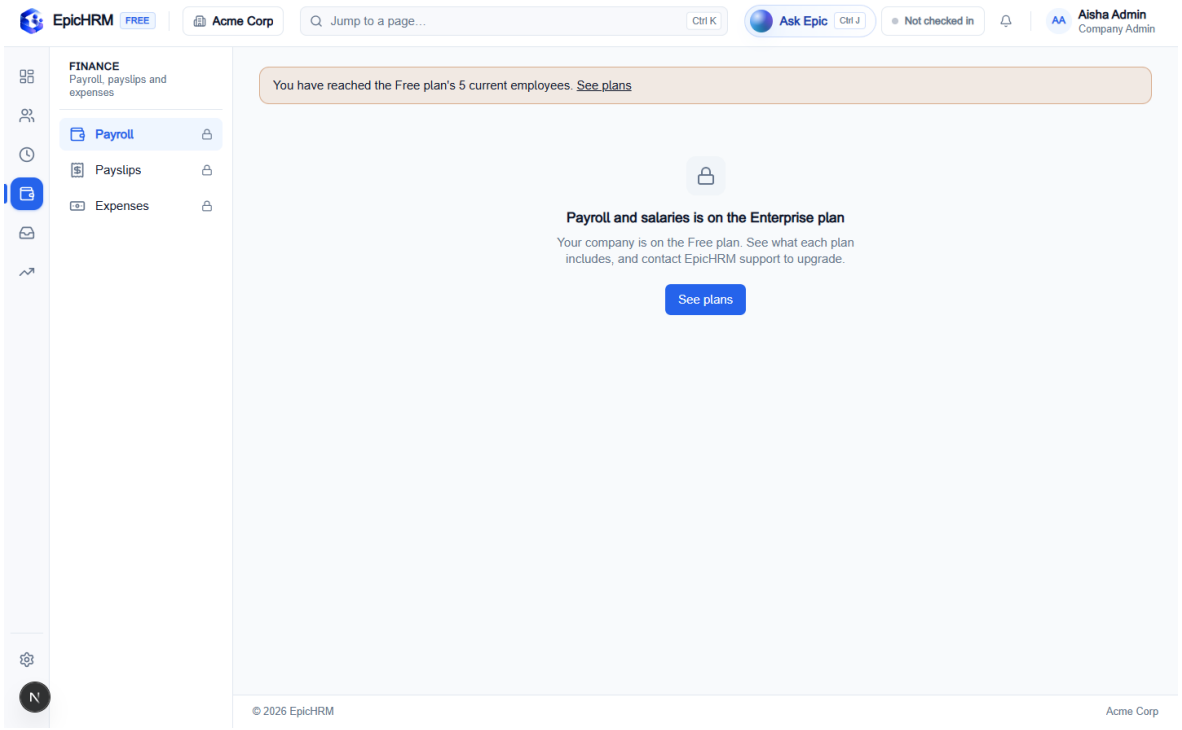
The inbox makes the next action visible instead of hiding it inside email threads.

FINANCE AND WORKSPACE

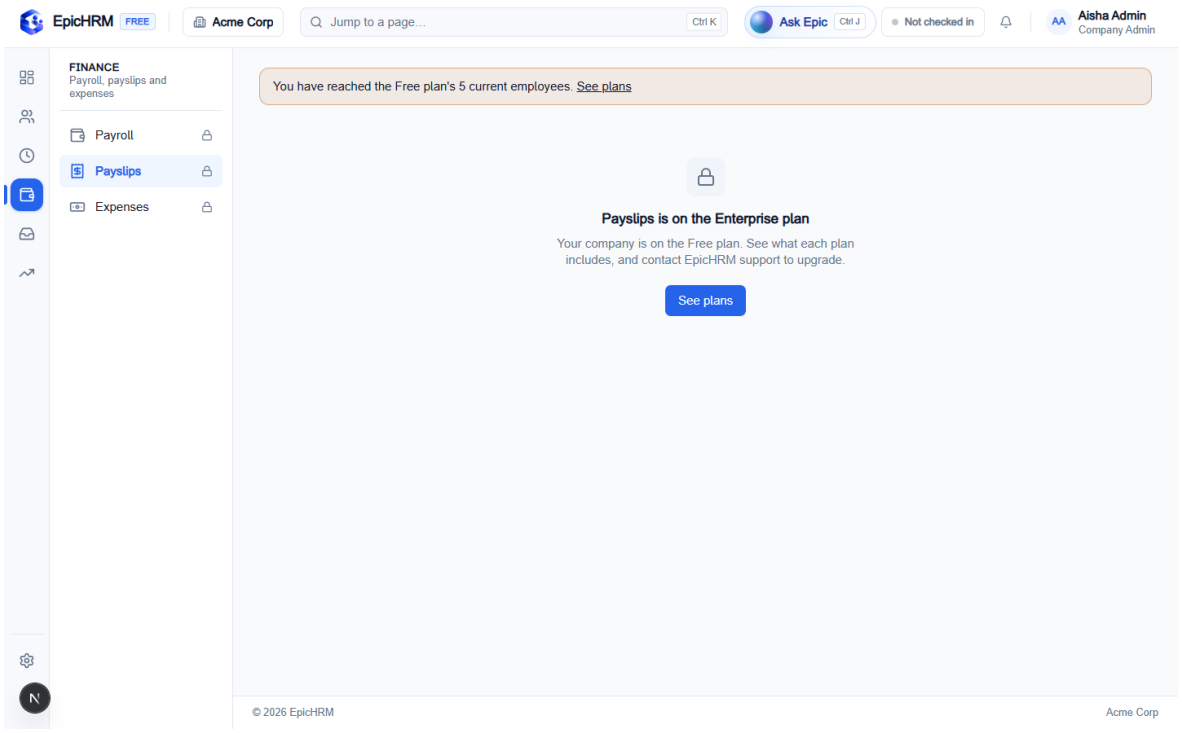
Run the month only after the records are ready.

Payroll and payslips

1. **Set salary data.** Add salary components and each employee's salary version.
2. **Create the month.** The run uses finalized attendance, approved leave and salary data, and calls out anyone left out.
3. **Review and approve.** Check deductions, unpaid or absent days and individual adjustments, then approve.
4. **Lock and publish.** Lock the run, then publish payslips. Employees see nothing until publication.



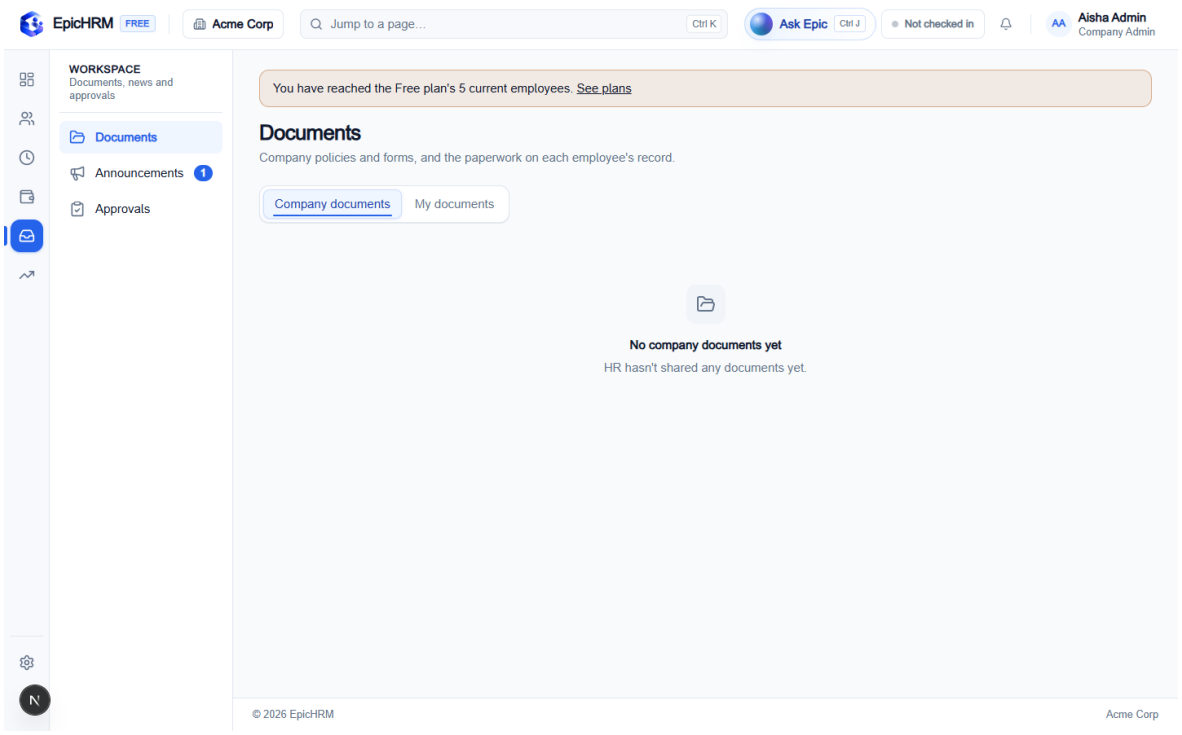
Payroll keeps review, approval, lock and publish states explicit.



Employees can view each published payslip and download it as a PDF.

Documents and reports

- Company documents are readable by everyone; HR and admins upload and edit them.
- Employee documents can be HR-only or visible to the employee, with expiry tracking.
- Pro and above includes headcount, attendance, leave, payroll and expense reports with URL filters and CSV export for admins and HR.

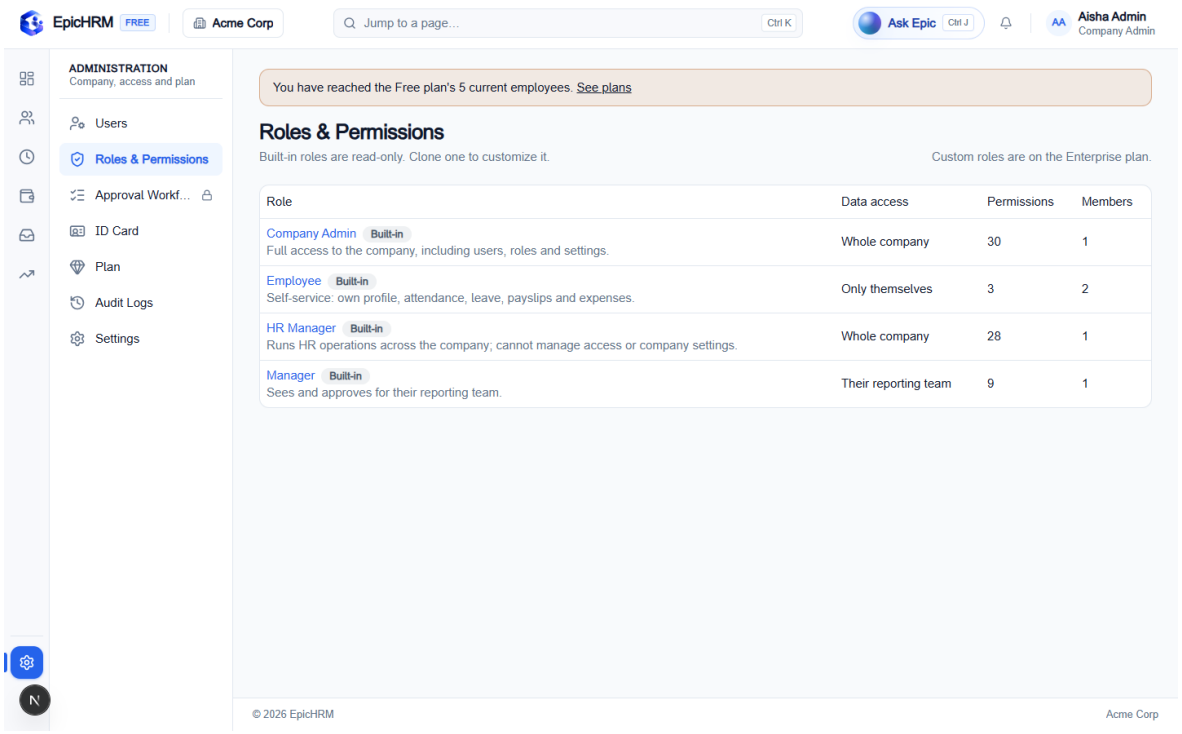


Documents keeps company policies, employee records and personal uploads in one workspace.

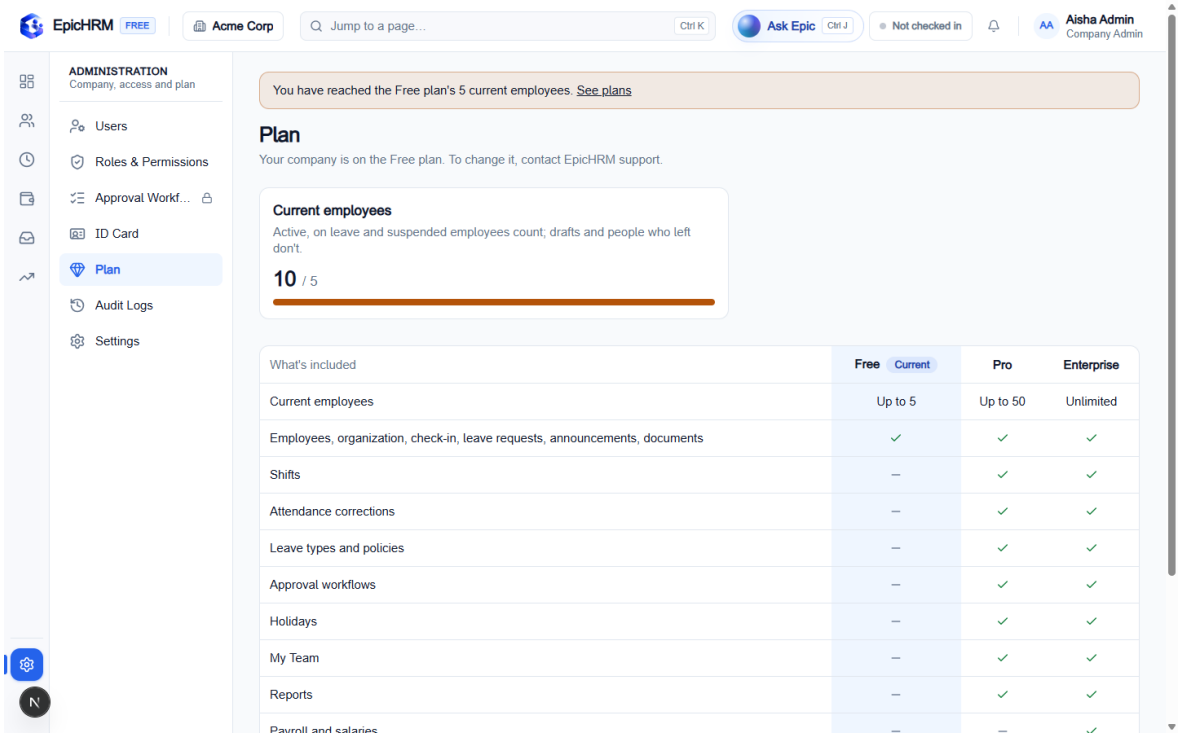
ADMINISTRATION AND PLANS

Set the rules once, then let the system carry them.

1. **Manage users.** Invite, change roles, revoke invitations or deactivate members under Administration - Users.
2. **Use roles and permissions.** The built-in roles are Company Admin, HR Manager, Manager and Employee. Enterprise can add custom roles.
3. **Review the audit log.** Employee, access, payroll, document and plan changes record who made them and when.
4. **Check the plan.** Free supports up to 5 current employees, Pro up to 50 and Enterprise is unlimited.
5. **Use a company domain when enabled.** Your deployment may provide an EpicHRM subdomain and one verified custom hostname. Add the exact hostname, copy its DNS records and wait for hostname and TLS status to become active. Never change mail or MX records.



Permissions keep access legible: every role has a clear scope and set of actions.



The Plan page shows your current plan, employee usage and included modules.

Need a hand?

If your screen looks different, your role or plan may be different. Ask your company admin to check your membership and permissions, or visit epichrm.com to book a demo.