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HRPayroll

Modern HRMS & Payroll Platform

Product Overview for Stakeholder Demonstrations

- Complete module catalogue with capabilities
- Me | Team dual workspace (manager as employee)
- Organisation masters, reporting hierarchy & org chart
- Technology stack and architecture principles
- India-ready statutory, tax & payroll workflows

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This document is prepared for product demonstrations and stakeholder reviews. It describes what HRPayroll covers today — the functional modules, the Me | Team operating model, organisation and reporting capabilities, security posture, and the technology stack. It is written so a buyer or partner can understand the product depth without reading source code.

HRPayroll is designed in the spirit of modern HRMS platforms such as Darwinbox, Keka, Zoho People, and BambooHR: a manager is also an employee; self-service and people-management are cleanly separated; organisation structure and login access are distinct concerns.

2. Product Snapshot

- Multi-tenant capable HRMS with company-scoped data
- India-ready payroll, attendance, leave, claims, loans, tax, and documents
- Role-based access: Super Admin, Admin, HR, Manager, Employee
- Me | Team dual workspace for managers and HR
- Live organisation masters: departments, designations, reporting lines, org chart
- Manager scope walks the full reporting subtree (skip-level included)
- Unified approvals inbox with unread notifications
- Optional SSO, TOTP two-factor authentication, and Razorpay billing

3. Me | Team Operating Model

A manager or HR user is first an employee. The header toggle switches between Me (self-service) and Team (people management). The selection is stored locally and transmitted on every API request as the header X-Workspace-View: self | team. The backend scope middleware then limits records accordingly. Employees have no toggle — they always operate in Me.

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3.1 Me workspace

- Own dashboard and personal KPIs
- Attendance punch in / out
- Apply leave and view balances
- Holidays calendar
- Submit reimbursements
- Loans and advances (self)
- Payslips and document requests
- Performance goals (self)
- Investment declarations
- My Profile (identity, PAN, bank)

3.2 Team workspace

- Team dashboard and pending actions
- Approvals inbox
- Team attendance mark / correct
- Team leave overview and approvals
- Shifts and shift swaps
- Performance reviews for reports
- Exit cases (scoped)
- Reports (team or company)
- Organization (chart for managers; masters for HR)

- Employee: always self.
- Manager + Team: self plus all descendants on the reporting tree (breadth-first, not one hop only).
- Manager cannot approve their own leave or expense.
- HR / Admin + Team: company-wide; + Me: own linked employee record when present.
- Approvals opened from Me automatically switch the workspace to Team.

4. Organisation & Hierarchy

Market HRMS products separate three layers: where a person sits (organisation structure), who manages them (reporting line), and what their login may do (access role). HRPayroll follows the same model.

Layer	Meaning	In HRPayroll
Org structure	Where the person sits	Departments (with parent & head) + designations
Reporting line	Who manages the person	Reports to + full skip-level subtree
Access role	What the login can do	Admin / HR / Manager / Employee + module matrix

- Departments: create, edit, deactivate; parent tree with circular-parent protection; department head (display only — does not grant Manager login).
- Designations: job title, optional department, level 1–10; delete blocked when employees are assigned.
- Employee form includes Reports to; self-report and circular chains are rejected by the API.
- Org Chart tab is built from reporting lines, not from department lists.
- New companies receive default departments, designations, and the permission matrix on creation.

5. Login Roles

Login Role	Typical User	Primary Capability
Super Admin	Platform operator	All companies, plans, billing
Admin	Company administrator	Users, payroll, roles matrix, settings
HR	HR business partner	Employees, org masters, recruitment, payroll ops
Manager	Line manager	Me self-service + Team of reporting subtree
Employee	Individual contributor	Me workspace only

Roles & Workflow configures the module permission matrix for Admin, HR, Manager, and Employee. A job designation never unlocks privileged modules by itself.

6. Module Catalogue

The following modules are implemented in the product. Each entry lists the intended audience, a capability summary, and the key features available for demonstration.

Dashboard

Audience: All roles

Role-aware home screens with actionable KPIs. Employees see personal attendance, leave balances, and payslip status. Managers see team presence and pending approvals. HR and Admin see organisation headcount, payroll trends, and open positions.

- Personal KPIs in Me workspace (attendance streak, leave balance, last payslip)
- Team KPIs in Team workspace (present today, pending leave, pending claims)

Employee Management

Audience: HR, Admin

Complete employee master with India-ready statutory fields. Supports add/edit, status filters, department tiles, CSV export, and a detailed employee profile covering leave, attendance, payslips, loans, and claims.

- Employee code, department, designation, joining date, salary, status
- Reports-to picker with circular-reporting prevention
- Statutory: PAN, UAN, ESI, PF, bank / IFSC
- Employee profile tabs for leave, attendance, payslips, loans, claims
- Plan-based employee quota enforcement

Organization

Audience: HR, Admin (edit); Manager (org chart)

First-class organisation masters and reporting hierarchy. Departments support parent hierarchy and department head. Designations carry optional department and level. Live org chart is built from reporting lines.

- Departments: create, edit, deactivate; parent department; department head
- Designations: job title, department, level 1–10
- Org Chart tab from reporting tree (company-wide for HR; subtree for managers)
- New company bootstrap seeds default departments and designations

Attendance

Audience: All roles (scoped)

Daily attendance register with punch, mark, correction, monthly summaries, late arrivals, and overtime. Self-service punch in Me; team marking and corrections in Team.

- Punch in / punch out for self
- Manager/HR mark and correct attendance for team or company
- Weekly summary, late arrivals, monthly report, overtime
- Import / export for HR and Admin in Team workspace

Leave Management

Audience: All roles (scoped)

Policy-driven leave apply, balance tracking, approval workflow via reporting manager, leave calendar, and holiday calendar.

- Apply leave against leave types and FY balances
- Pending / approved views; approve or reject (cannot approve own)
- Leave calendar and holiday calendar
- Notification to reporting manager on submission

Shift Management

Audience: Manager, HR, Admin

Team roster, weekly-off configuration by department, and shift-swap requests with manager approval. Available in Team workspace only.

- Shift roster for the team
- Weekly-off configuration
- Shift swap request and approval

Payroll Processing

Audience: HR, Admin

Monthly payroll run with entry generation, holds, and payslip creation for the company.

- Payroll run for a selected month

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- Payslip generation from payroll entries

Salary Structure

Audience: HR, Admin

CTC bands and salary structures that can be assigned to employees for payroll calculation.

- Define and maintain salary structures
- Assign structures to employees

Tax & Compliance

Audience: HR, Admin; Employee (declarations)

Indian tax and statutory compliance surfaces including slabs, obligations, and investment declaration verification. Employees declare investments in Me; HR verifies in Team.

- Statutory obligations and tax slabs
- Employee investment declaration (Me)
- HR verification of declarations

Reimbursement

Audience: All roles (scoped)

Expense claims by category. Employees submit in Me; managers and HR approve in Team.

- Submit expense claims
- Manager / HR approval
- Claim status tracking

Loans & Advances

Audience: Employee (apply); HR, Admin (approve)

Employee loans and advances with EMI tracking. Approval is reserved for HR and Admin.

- Apply for loan or advance
- EMI schedule and status
- HR / Admin approval

Payslip & Documents

Audience: All roles (scoped)

Self-service payslip preview and download, Form 16, certificates, letters, and document requests to HR. HR can issue documents from Team.

- Own payslip preview / download
- Form 16 and certificate library
- Document request to HR; HR issue flow
- Statutory correction request from My Profile

Performance

Audience: Employee, Manager, HR

Goals and appraisal reviews. Employees manage own goals in Me; managers review the team in Team. HR can initialise review cycles.

- Personal goals in Me
- Team reviews in Team
- Review-cycle initialisation for HR/Admin

Recruitment

Audience: HR, Admin

Hiring pipeline covering job openings, candidates, interviews, and offers.

- Job openings and candidates

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- Offer management

Exit & Full and Final

Audience: Manager, HR, Admin

Resignation / exit initiation, clearance checklist, and F&F status. Managers see team-scoped cases.

- Initiate exit
- Clearance checklist
- F&F status tracking

Reports

Audience: Manager, HR, Admin

Saved reports and overview charts. Managers receive team-scoped analytics; HR and Admin receive organisation-wide views.

- Overview charts
- Saved reports
- Team-scoped manager reporting

Approvals Inbox

Audience: Manager, HR, Admin

Unified inbox for leave, expenses, shift swaps, loans, documents, statutory corrections, and investment declarations — routed by role.

- Leave, expense, shift-swap for managers
- Loans, documents, investments for HR/Admin
- Unread notification badge in the header

Roles & Workflow

Audience: Admin

Module permission matrix for Admin, HR, Manager, and Employee. Approval workflow templates are stored for configuration (runtime leave/expense currently uses reporting manager + role).

- Per-module access matrix by login role
- Approval workflow templates

Settings, Billing & Platform

Audience: Admin / Super Admin

Company profile, user invites, Razorpay billing, and multi-company platform operations for super administrators.

- Company settings and invites
- Subscription / billing (Razorpay)
- Platform company list and onboarding

7. Product Differentiators

Me | Team dual workspace

Managers and HR are employees too. A header toggle switches between self-service (Me) and people-management (Team). The choice is persisted and sent as X-Workspace-View on every API call so the backend enforces the correct data scope.

Reporting hierarchy with skip-level scope

Each employee has a Reports to manager. Manager Team data includes the full reporting subtree (not only direct reports), matching how Darwinbox, Keka, Zoho People, and BambooHR scope manager visibility.

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Organisation masters in the product UI

Departments and designations are managed live — not locked in seed files. Departments support parent hierarchy and a department head. An org chart is rendered from reporting lines.

Job title "` system access

Designation (e.g. “HR Manager”) never grants payroll. Access comes only from login role plus the company permission matrix — the same separation used by modern HRMS platforms.

India-ready statutory & payroll

PAN, UAN, ESI, PF, bank/IFSC, Form 16, tax regimes, and investment declarations are first-class, not afterthoughts.

8. Technology Stack

HRPayroll is a modern full-stack web application. The frontend is a React SPA; the backend is a Node.js REST API with MongoDB persistence and JWT-based authentication.

Layer	Technology	Purpose
Frontend	React 18 + TypeScript	Single-page application UI
Build	Vite	Fast development and production builds
Styling	Tailwind CSS	Utility-first responsive design
Charts	Recharts	Dashboard and report visualisations
Backend	Node.js + Express	REST API under /api
Database	MongoDB + Mongoose 8	Document store with company tenancy
Auth	JWT + httpOnly refresh cookie	Access (short-lived) and refresh (rotating)
Security	Helmet, CORS, rate limiting	Hardened HTTP surface
2FA	TOTP (otplib) + QR	Optional two-factor authentication
SSO	Google / Microsoft (optional)	Enterprise identity sign-in
Billing	Razorpay	Subscriptions and webhooks
PDF	PDFKit	Payslips and generated documents
Email	Nodemailer	Password reset and notifications
Validation	express-validator	Request input validation

9. Architecture Principles

- Request pipeline: authenticate !’ attach tenant !’ load actor (linked employee) !’ enforce module permission !’ optional role gate.
- Workspace header X-Workspace-View forces self scope for linked employees when Me is selected, including HR and Admin.
- Every tenant document is company-scoped; cross-tenant access is blocked.
- CORS is locked to the configured client origin with credentials for cookie-based refresh.
- Password policy, login lockout, refresh-token revocation, Helmet headers, and API rate limiting harden the surface.
- Optional Google / Microsoft SSO and TOTP two-factor authentication support enterprise expectations.

- JWT access tokens with rotating httpOnly refresh cookies
- Account lockout after repeated failed logins
- Password complexity enforcement
- Module-level authorisation matrix per company
- Tenant isolation on every data path
- Helmet security headers and CORS origin lock
- Rate limiting on authentication and API routes
- Optional TOTP 2FA with backup codes

11. Demo Accounts (Seed)

Role	Email	Password	Linked Employee
Admin	admin@hrpayroll.com	Admin@123	—
HR	hr@hrpayroll.com	Hr@12345	Anita Desai — HR Manager
Manager	manager@hrpayroll.com	Manager@123	Rahul Verma — Sales Manager
Employee	employee@hrpayroll.com	Employee@123	Priya Sharma — Senior Developer

Suggested demo path: sign in as Manager !’ show Me (self punch, leave, payslip) !’ switch Team (approvals, team leave, org chart) !’ sign in as HR !’ show Organization masters, employees with Reports to, payroll and recruitment. Manager team includes Priya Sharma, Sneha Patel, and skip-level Deepak Kumar.

12. Roadmap (Not in Current Release)

- Custom access roles beyond the four fixed login roles
- Locations / branches as a master mapped to attendance and holidays
- HRBP scoped to selected departments only
- Step-by-step execution of approval workflow templates
- Cost centres, legal entities, and dotted-line / matrix reporting
- Designation level driving salary-band eligibility

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13. Document Control

Title: HRPayroll — Product Overview

Subject: Modules, Capabilities & Technology Stack

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