

HCSM

**HR-Tool
User Manual
Company**

Version 1.0

Last updated 17 Jan. 2022

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Activate account and set password

HCSM

→ Activate account

You will receive an invitation to the HR tool by email.
Create your account by clicking on "Activate account".

Welcome to test company

They have just been added as a new employee.

At we create your payroll and need your personal data. Please activate your account tool.

Activate account

Activate account

→ Create password

After you have set your password, you can log in.
To do this, enter your password again and click "Login".



ENG

Login

E-mail

Password

Login

[Forgot password?](#)

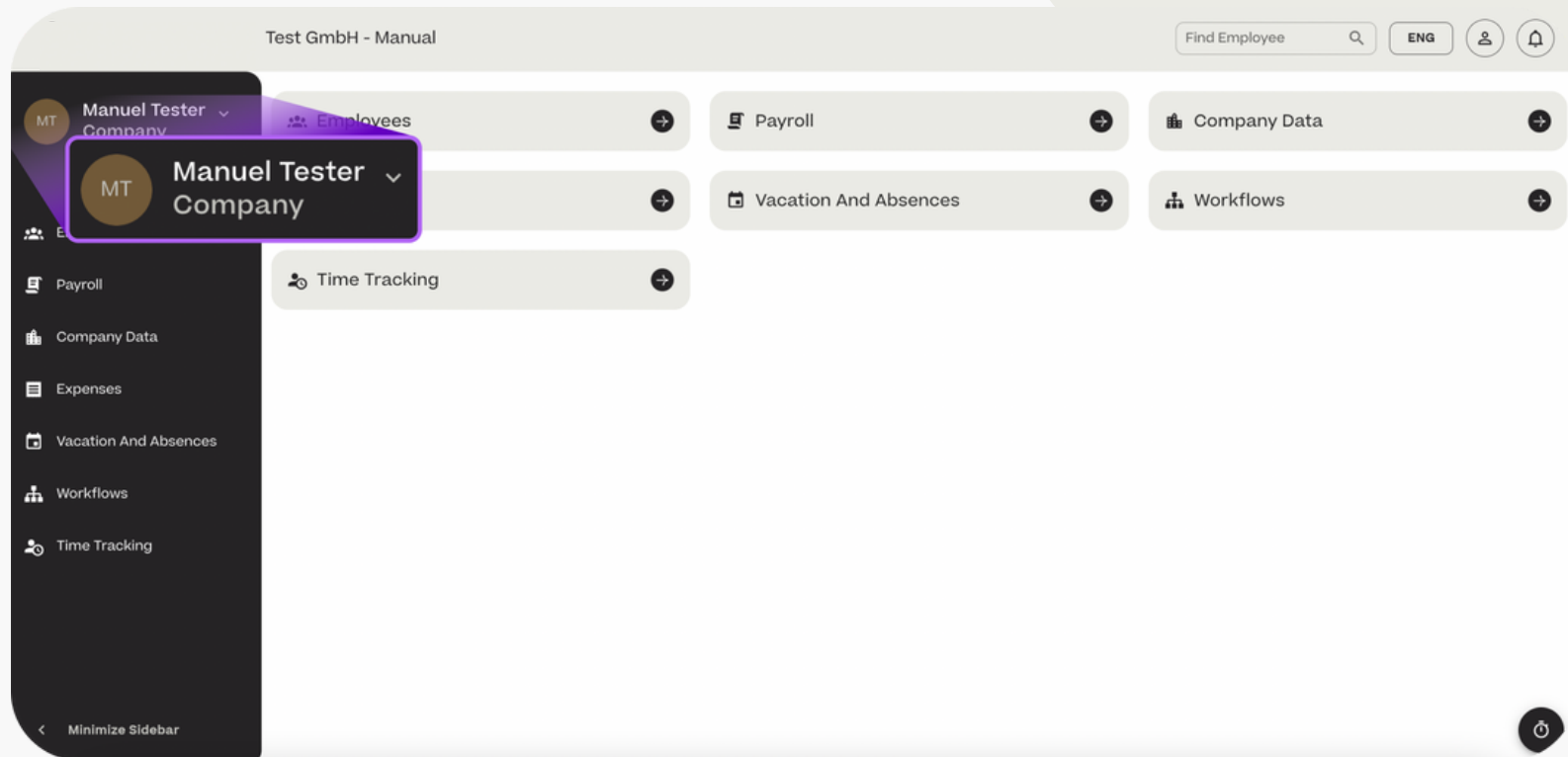
→ Homepage

– Role change

After logging in, you will be redirected to the homepage.

On the homepage, you can switch between the two roles as, for example HR employee of the "Company" and as "Private" person.

In the further course of these manual, only the role of the "Company" is relevant for you.



Employees

HCSM

→ Employees

– Employee overview - Add employee

In the "Employees" > "Overview" area, the digital personnel file of your company is visible.

There you will see a list of all employees invited to the HR tool. Via the button "+ Add" you can invite a new employee. When an employee has accepted his invitation to the HR tool, the status changes from "Invitation" to "Confirmed".

Test GmbH - Manuel

Find Employee ENG

COMPANY ■ EMPLOYEES ■ OVERVIEW

Manuel Tester Company

Employees

Overview

Documents

Statistics

Payroll

Company Data

Expenses

Vacation And Absences

Workflows

Time Tracking

Minimize Sidebar

Search Employee contract data status: Active

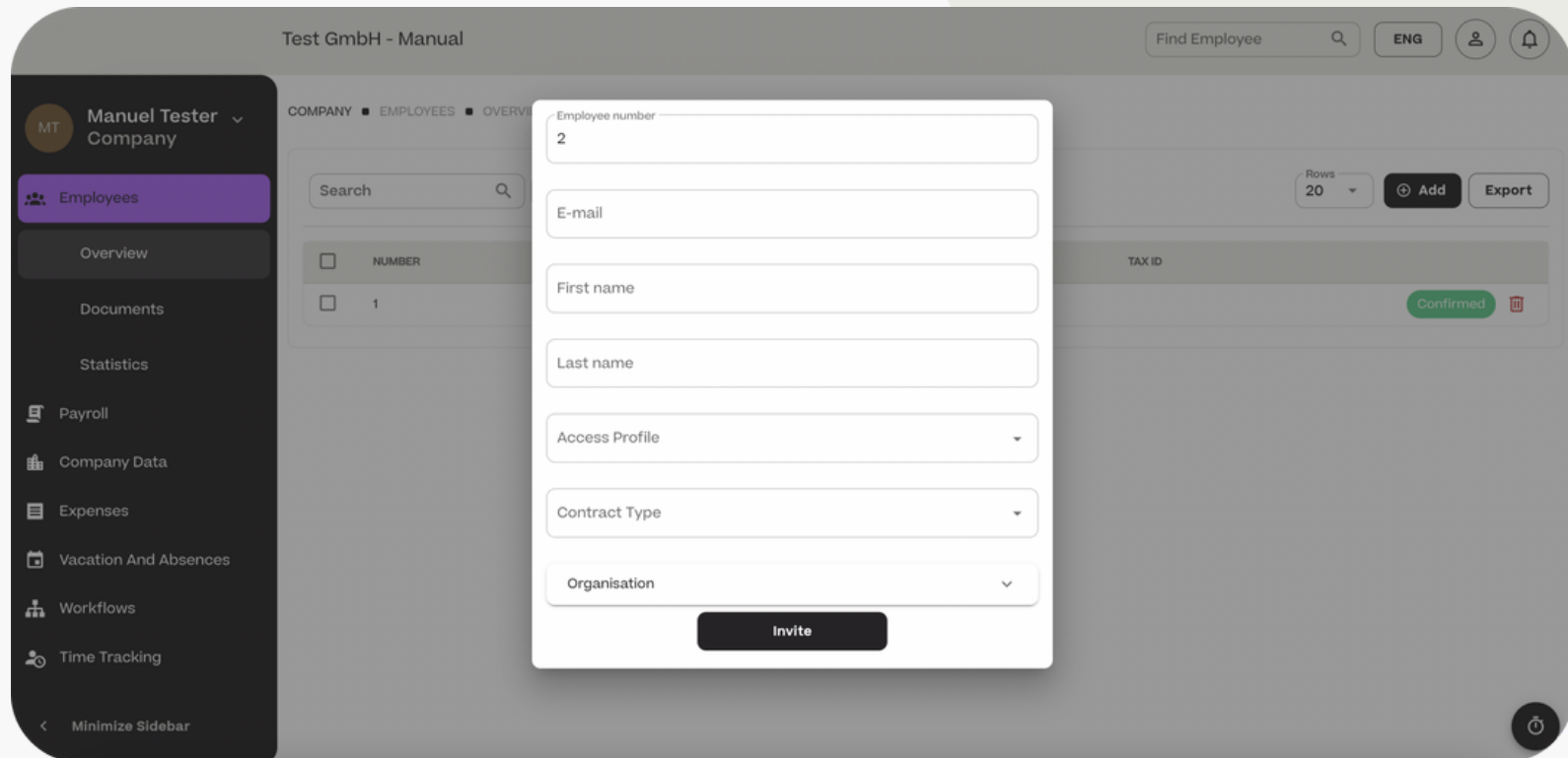
Rows: 20

<input type="checkbox"/>	NUMBER	FIRST NAME	LAST NAME	LOCATION	TAX ID	
<input type="checkbox"/>	1	Manuel	Tester			Confirmed

→ Employees

– Employee overview - Add employee

To add an employee, enter the employee's email address, first and last name and the contract type.



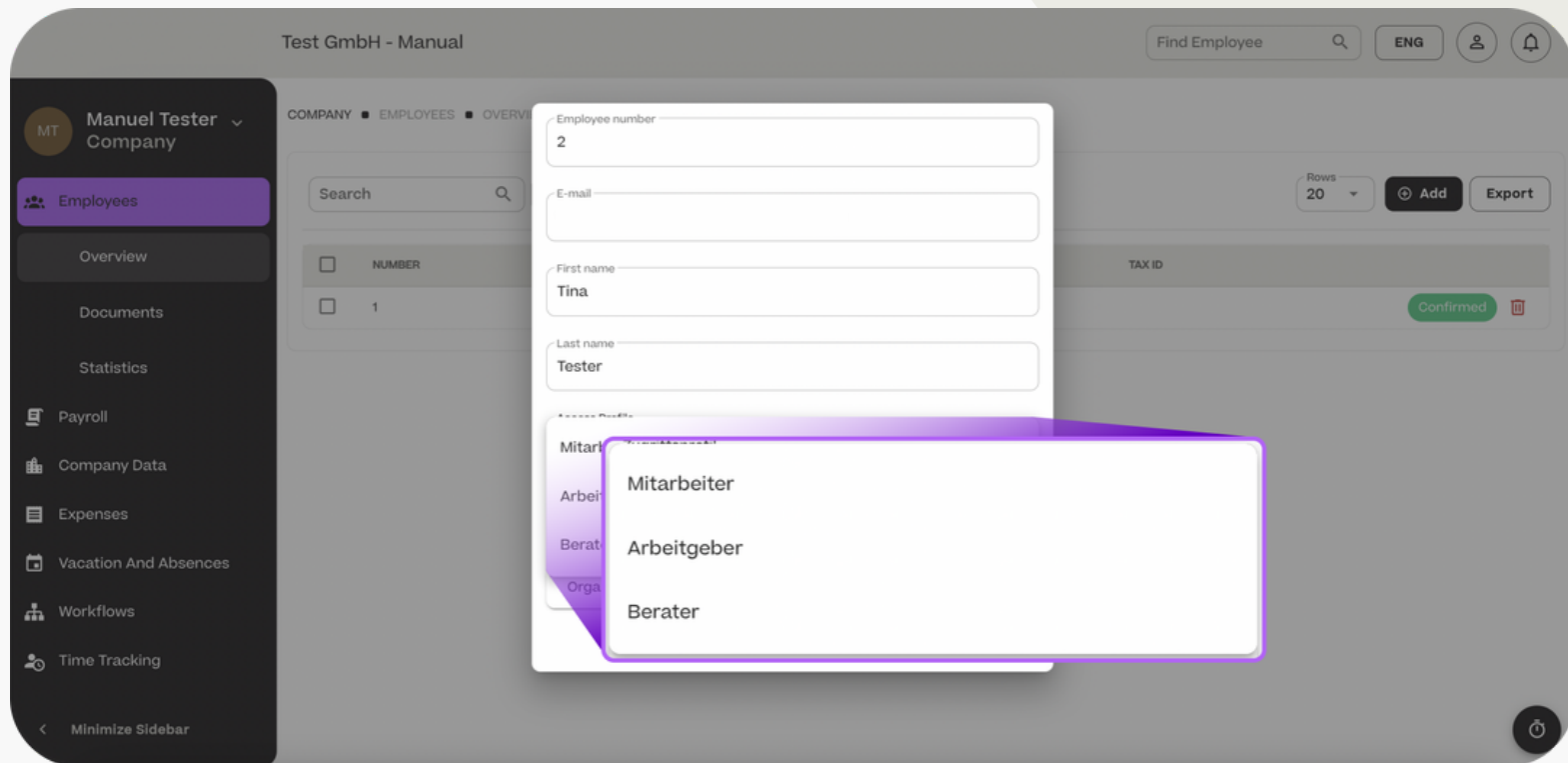
→ Employees

– Employee overview - Add employee

Then choose which access right the employee should have.

The 3 default variants are:

- Employee = Mitarbeiter - Restricted access (only employee's private data)
- Employer = Arbeitgeber - Full access to all employee and company data
- Consultant = Berater - Access to evaluations only

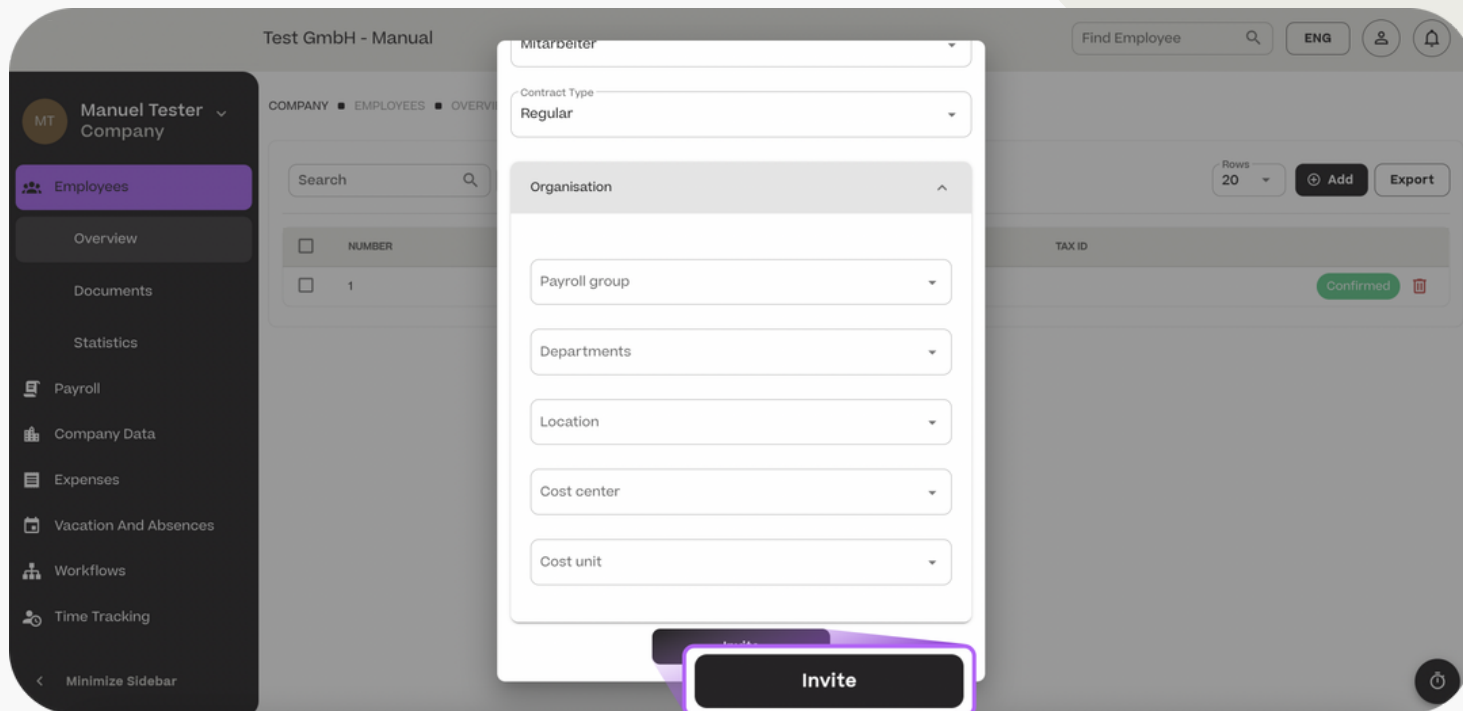


→ Employees

– Employee overview - Add employee

Optionally, the employee can be assigned e.g. a department or a location via "Organization". For this, you have to create these attributes in the "Company" > "Company Structure" area first.

Then click on "Invite". The employee will receive an invitation to the tool by e-mail and can enter the rest of his master data independently.

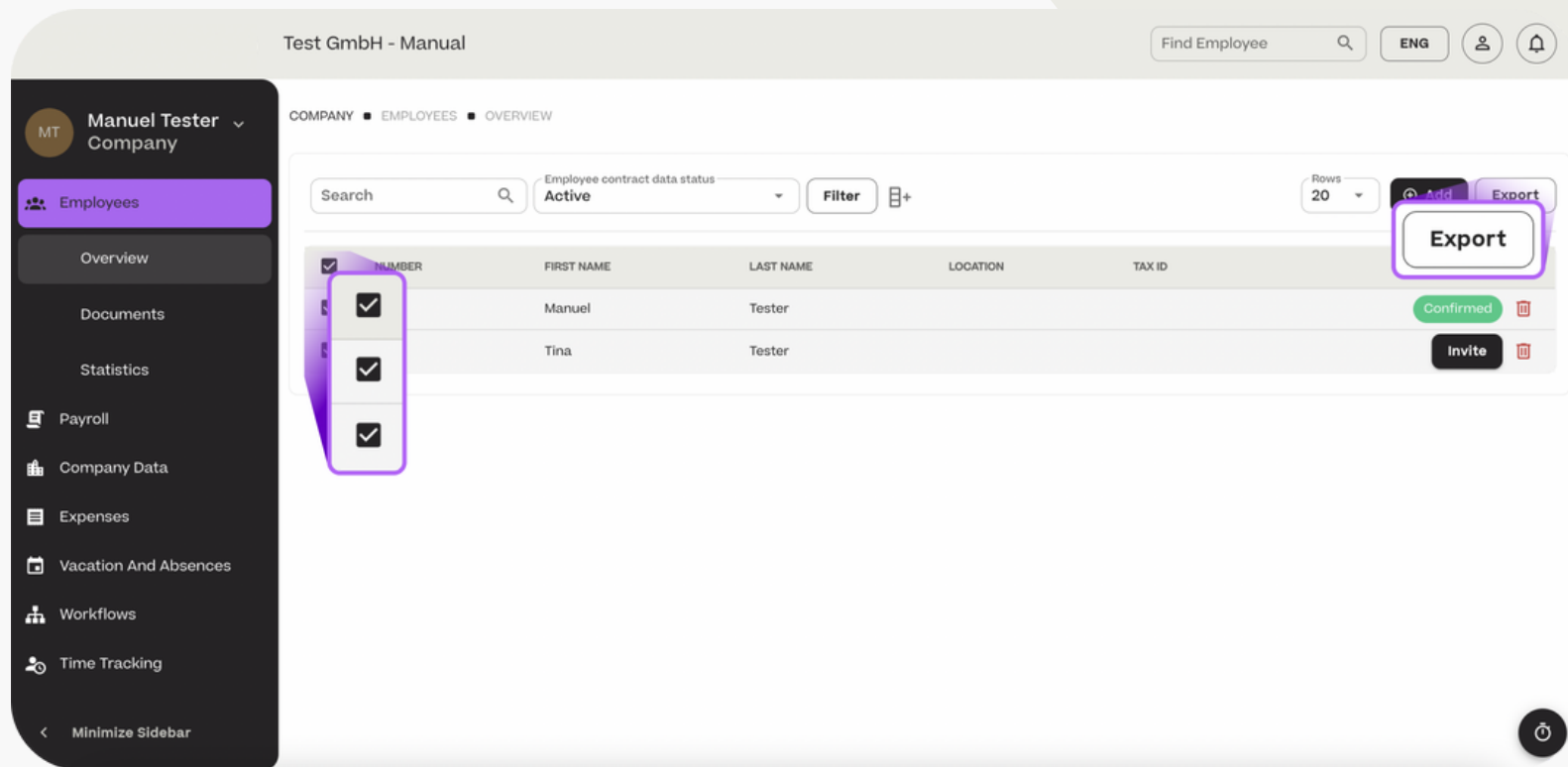


→ Employees

– Employee overview - Export employee data

If you want to export the master data of one or more employees as csv or Excel, first select them and then click on export.

Which other data besides the employee's name will be exported, you can set yourself (see following page).



→ Employees

– Employee overview - column display

In the employee overview, you can choose which employee data is displayed in the overview. To do this, click on the column icon.

Important: Only the columns that are also displayed in the overview are exported.

Test GmbH - Manual

Find Employee 🔍 ENG 👤 🔔

COMPANY ■ EMPLOYEES ■ OVERVIEW

Search 🔍 Employee contract data status: Active Filter 🗒️+

Rows: 20 Add Export

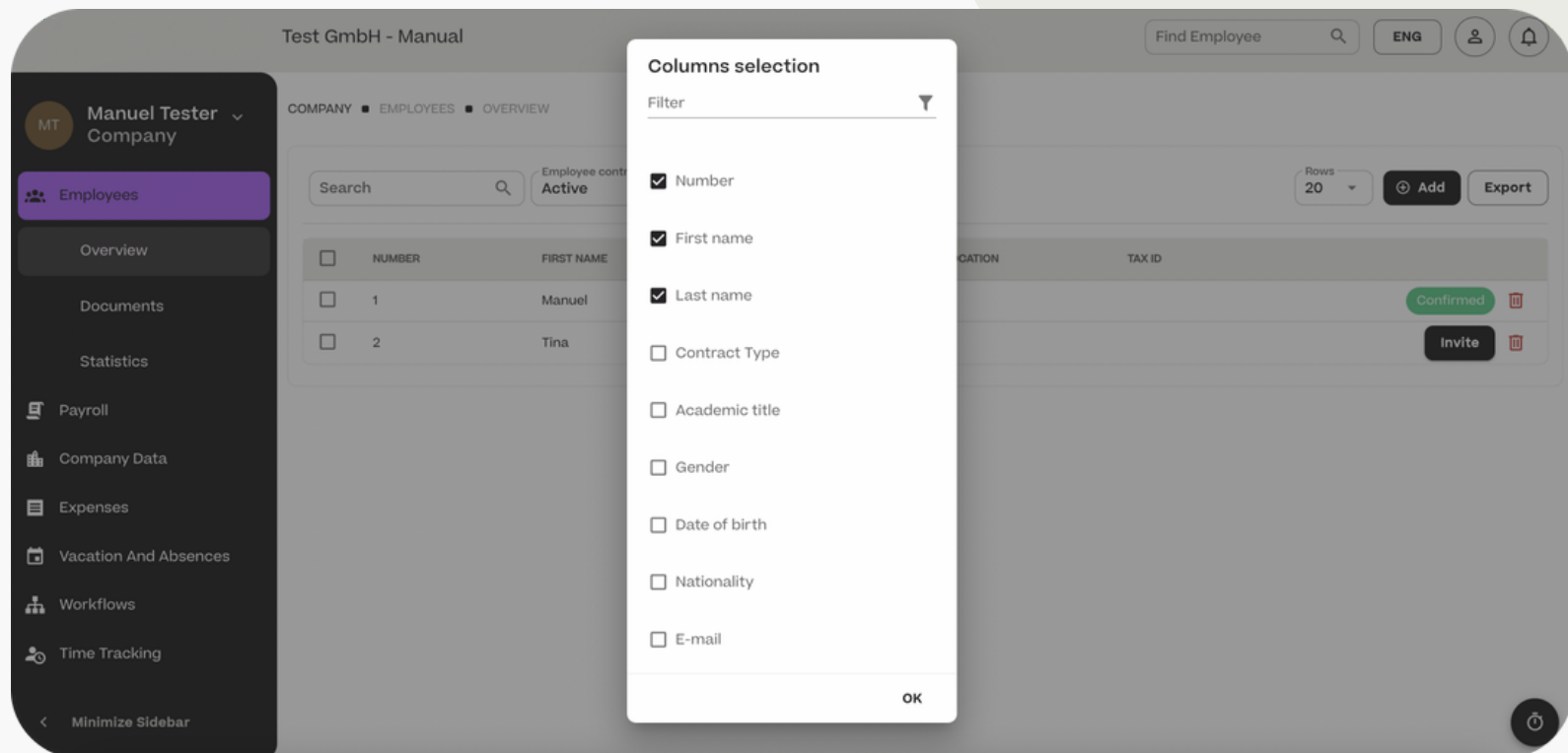
<input checked="" type="checkbox"/>	NUMBER	FIRST NAME	LAST NAME	TAX ID
<input checked="" type="checkbox"/>	1	Manuel	Tester	Confirmed 🗑️
<input checked="" type="checkbox"/>	2	Tina	Tester	Invite 🗑️

Minimize Sidebar <

→ Employees

– Employee overview - column display

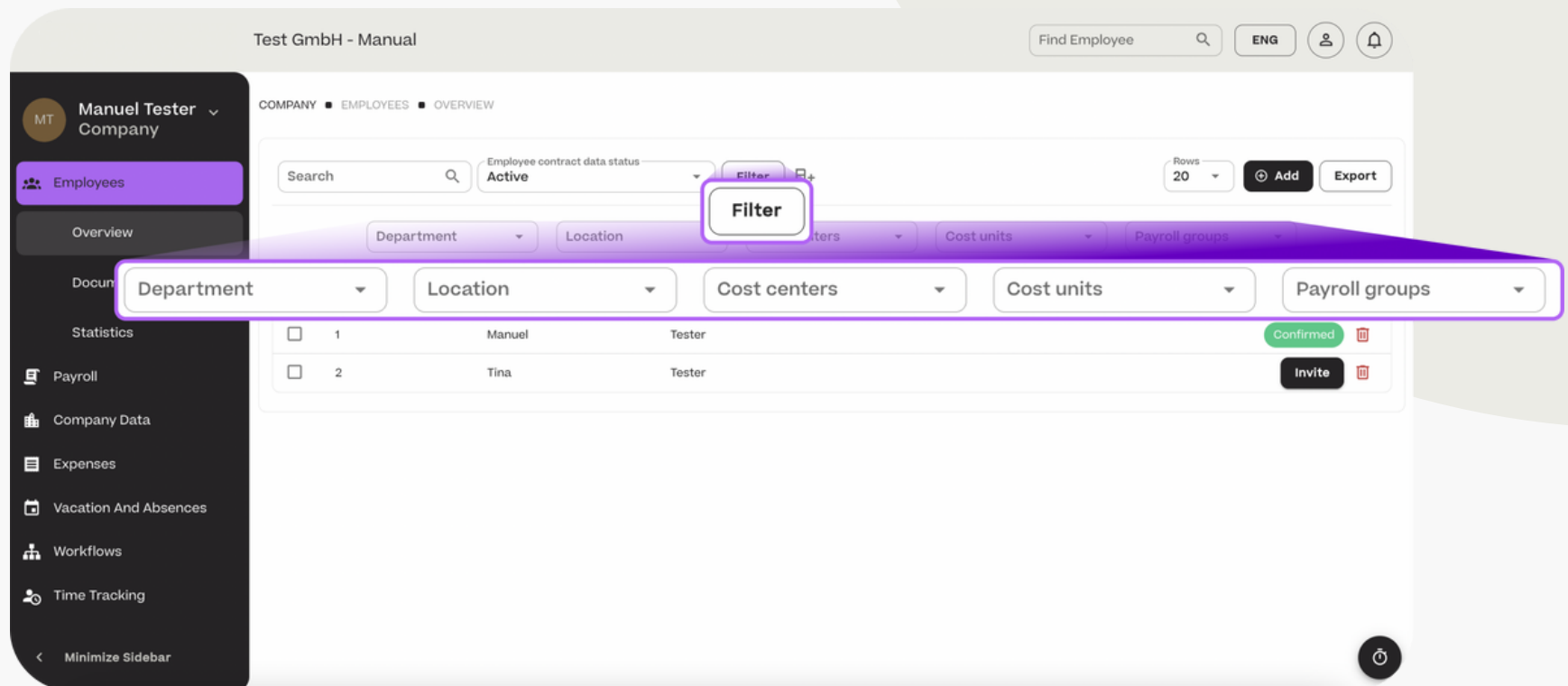
Now select the properties you want to see and click "OK".



→ Employees

– Employee overview - filter by properties

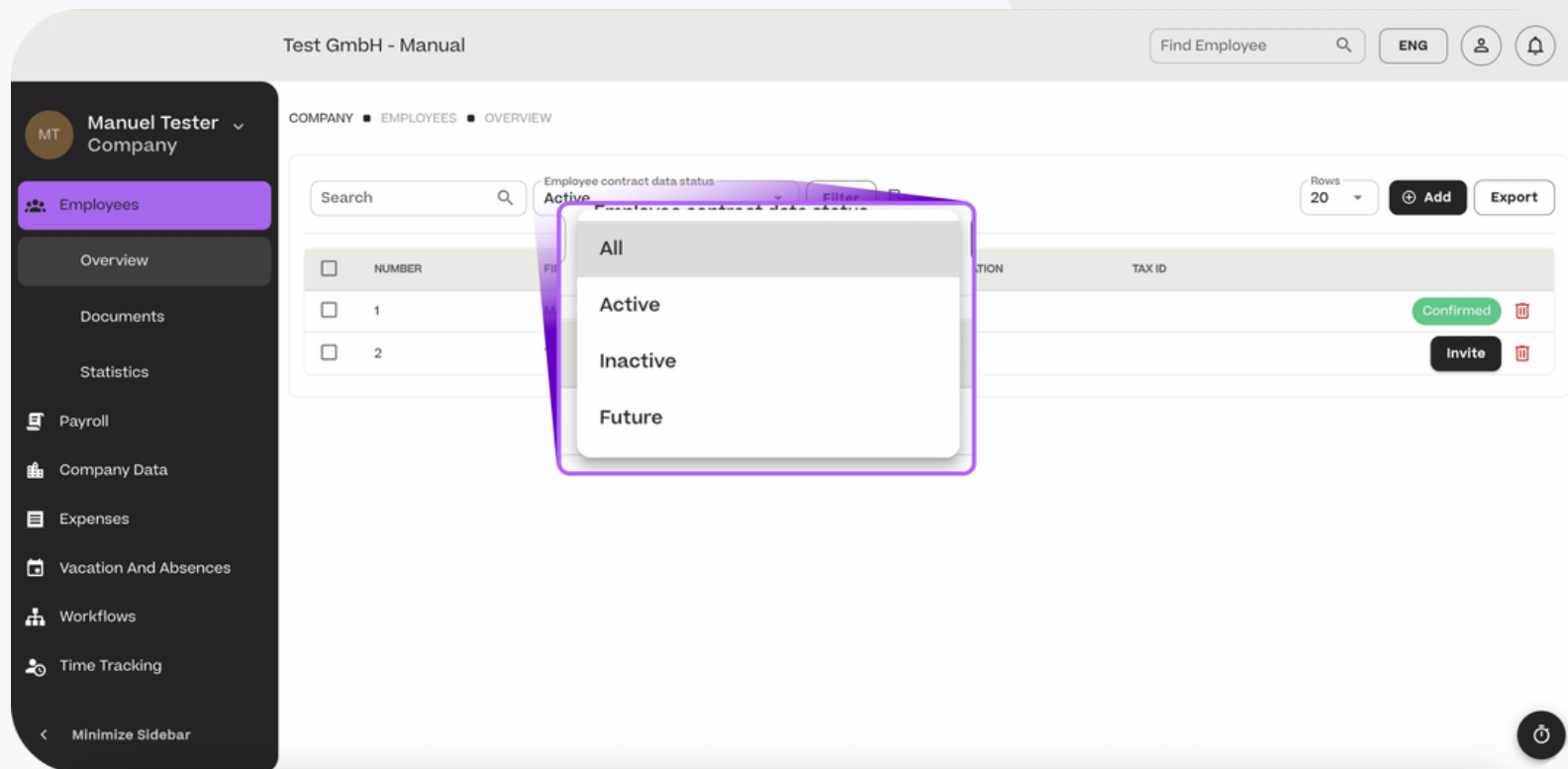
In the employee overview, you can filter by employee properties by clicking on "Filter". For example, you can display only employees of a certain department.



→ Employees

– Employee overview - filter by contract status

Using the drop-down menu selection, you can also filter the employees by contract status. For example, you can display only all active employees of your company.



→ Employees

– Employee overview - personal employee data

In the "Employee overview" you can click on a specific employee and view the detailed master data of the employee.

In the "Personal" section you will find the address and master data of the employee. The employee enters this data himself via his private profile.

The screenshot displays the 'PERSONAL' section for employee Manuel Tester. The interface includes a sidebar with navigation options like 'Employees', 'Overview', 'Documents', 'Statistics', 'Payroll', 'Company Data', 'Expenses', 'Vacation And Absences', 'Workflows', and 'Time Tracking'. The main content area is titled '1 - Manuel Tester' and contains a form with three columns: 'General', 'Address', and 'Additional information'. The 'PERSONAL' tab is highlighted with a purple circle. The form fields are as follows:

General	Address	Additional information	
Academic title No title	Country	Nationality	
Gender	Postcode	Personal Phone number	
First name Manuel	State	Emergency contact	
Last name Tester	City	Emergency contact Phone number	
Date of birth	Street	House number	Education level
Private E-mail	Additional address information	Professional education level	

A 'Save' button is located at the bottom center of the form.

→ Employees

– Employee overview - organizational data

In the "Organization" area you can enter the data of the organization affiliation of the respective employee.

These fields are to be filled in by you and cannot be entered by the employee himself.

The screenshot displays the HCSM web application interface. At the top, the breadcrumb navigation shows 'Test GmbH - Manual' followed by 'COMPANY ■ EMPLOYEES ■ 1 - MANUEL TESTER'. The 'ORGANIZATION' tab is highlighted with a purple border. Below the tabs, the employee name '1 - Manuel Tester' is shown, along with a 'Next employee >' button. The main content area contains an 'Access Rights' section and a form with the following fields:

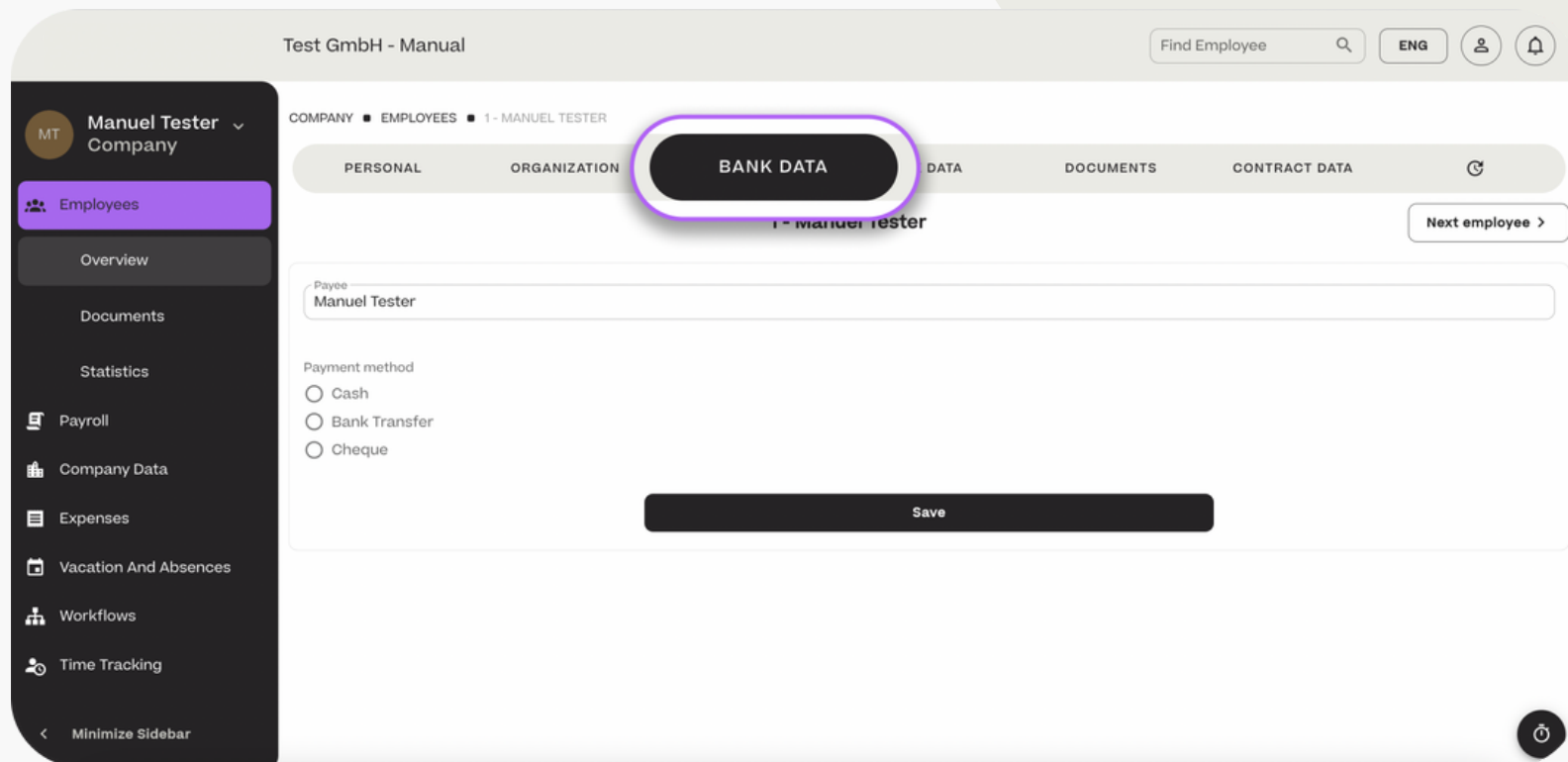
- Employee number: 1
- Payroll group: 1 - PayrollGroup 1
- Location: (dropdown menu)
- Departments: (dropdown menu)
- Cost centers: (dropdown menu)
- Cost units: (dropdown menu)

A 'Save' button is located at the bottom of the form. The left sidebar shows the user 'Manuel Tester' and various navigation options like 'Employees', 'Overview', 'Documents', 'Statistics', 'Payroll', 'Company Data', 'Expenses', 'Vacation And Absences', 'Workflows', and 'Time Tracking'.

→ Employee

– Employee overview - bank data

In the "Bank data" area, you can view the bank data of the respective employee. The employee enters these himself via his private profile.



→ Employees

– Employee overview - tax data

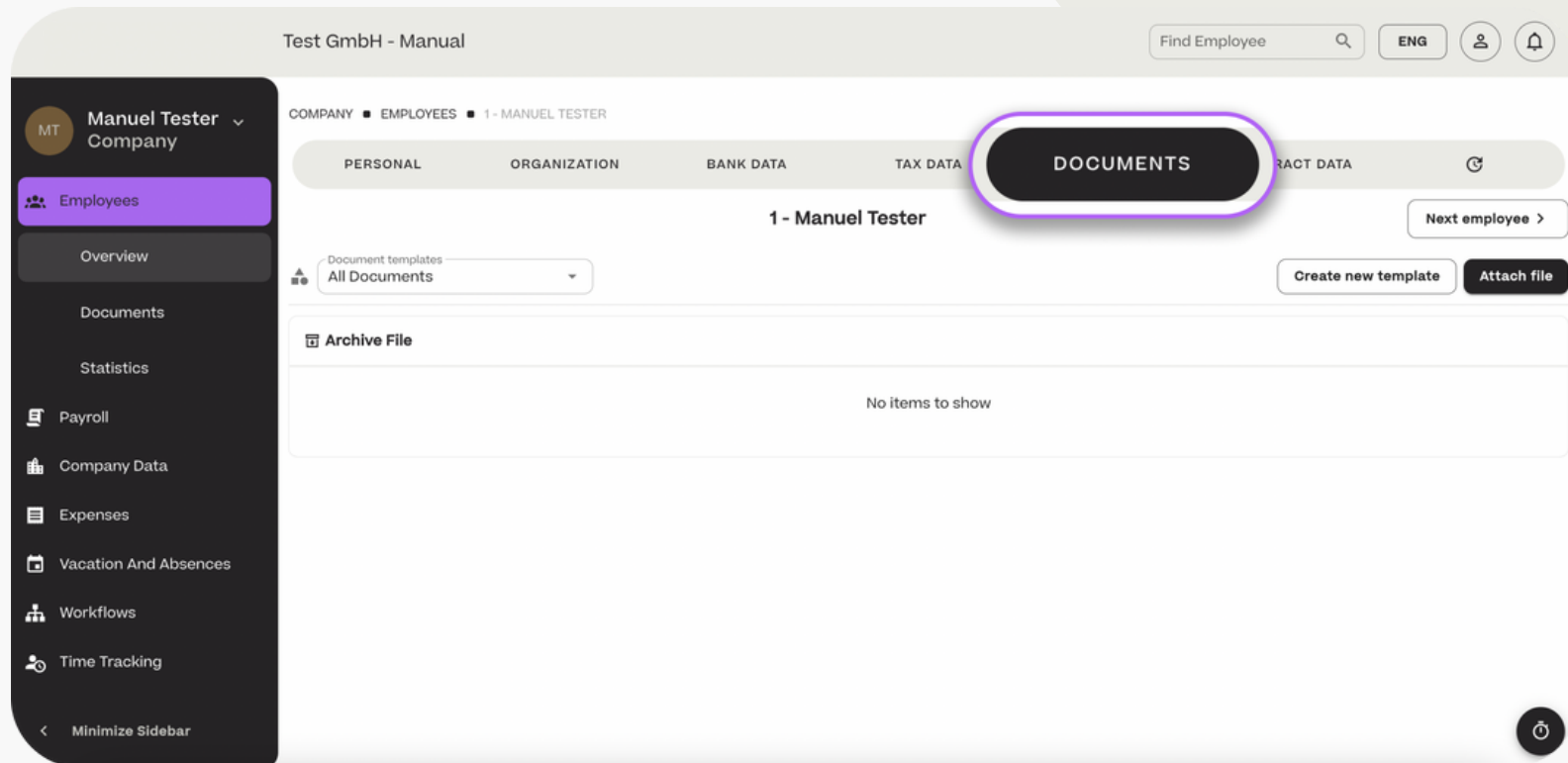
In the "Tax data" area, you can access the tax and SI data of the respective employee. The employee enters this data himself via his private profile.

The screenshot displays the HCSM interface for 'Test GmbH - Manual'. The top navigation bar includes a search field 'Find Employee', a language selector 'ENG', and user profile icons. The left sidebar shows the user 'Manuel Tester' and a list of menu items: Employees, Overview, Documents, Statistics, Payroll, Company Data, Expenses, Vacation And Absences, Workflows, and Time Tracking. The main content area is titled '1 - Manuel Tester' and features a horizontal tab bar with 'TAX DATA' selected and highlighted by a purple circle. Below the tabs, there are two columns of form fields: 'Tax details' and 'Health insurance data'. The 'Tax details' section includes a 'No Tax ID' toggle, a 'Tax ID' input field (0/11), a 'Degree of disability' dropdown, and radio buttons for 'Do you have more than one job?' (Yes/No). The 'Health insurance data' section includes a 'No SSN' toggle, an 'SSN' input field (0/12), an 'Insurance type' dropdown, and radio buttons for 'Do you have children?' (Yes/No). At the bottom, there is an 'Extra Tax or Employment information' text area and a 'Save' button.

→ Employees

– Employee overview - documents

You and the employee can exchange documents with each other via "Employee overview" > "Employees" > "Documents". The documents stored here can only be viewed by the company and the employee concerned. If documents relevant to you have been added to the employee's account, you can view and download them at any time.

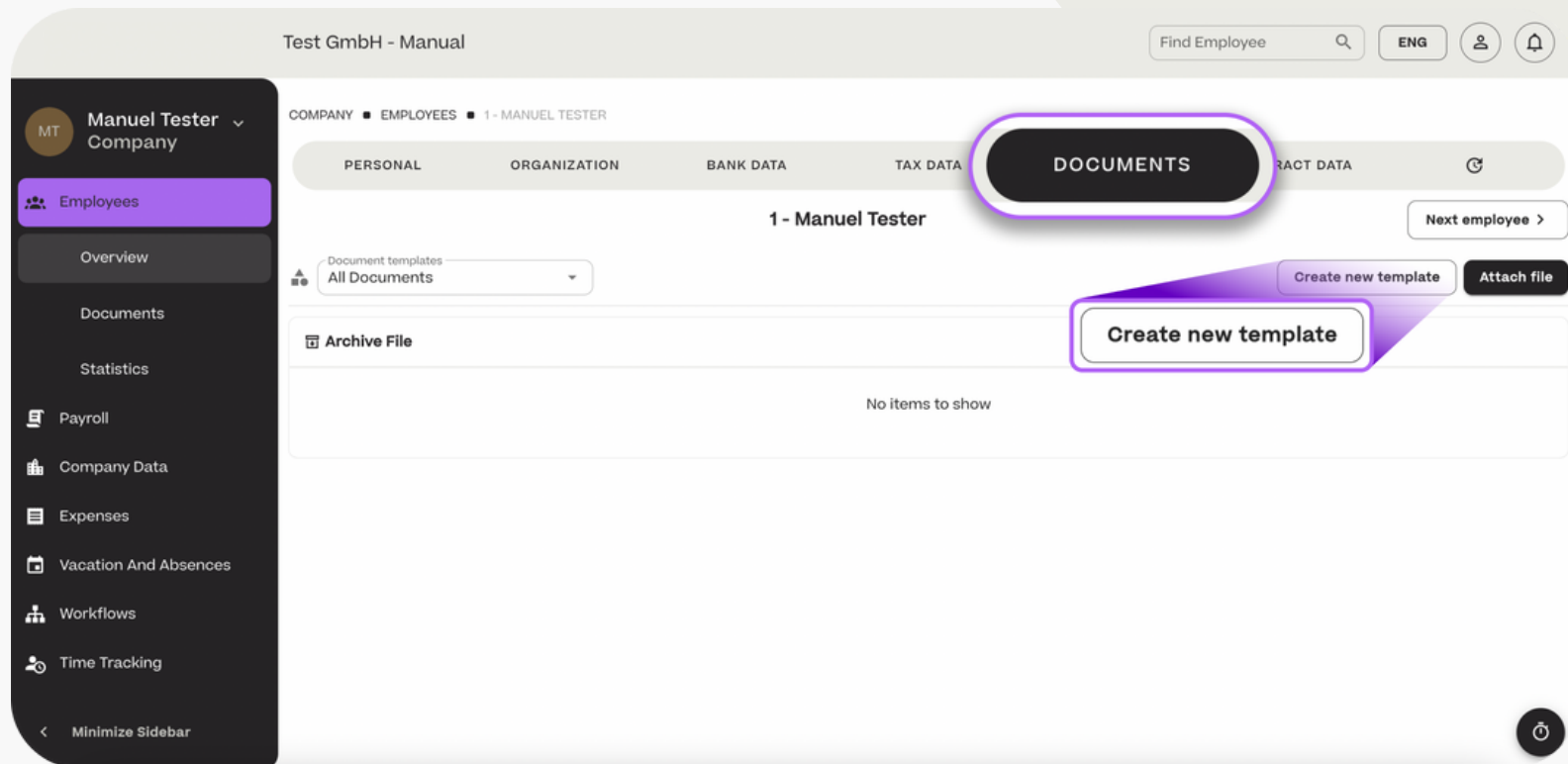


→ Employees

– Employee overview - Documents - Create new template

In addition, you can automatically create documents such as an employment contract based on the entered master data of the employee. The requirement is that master data has been entered and a template has been created in the "Company" > "Document templates" area (cf. page 73).

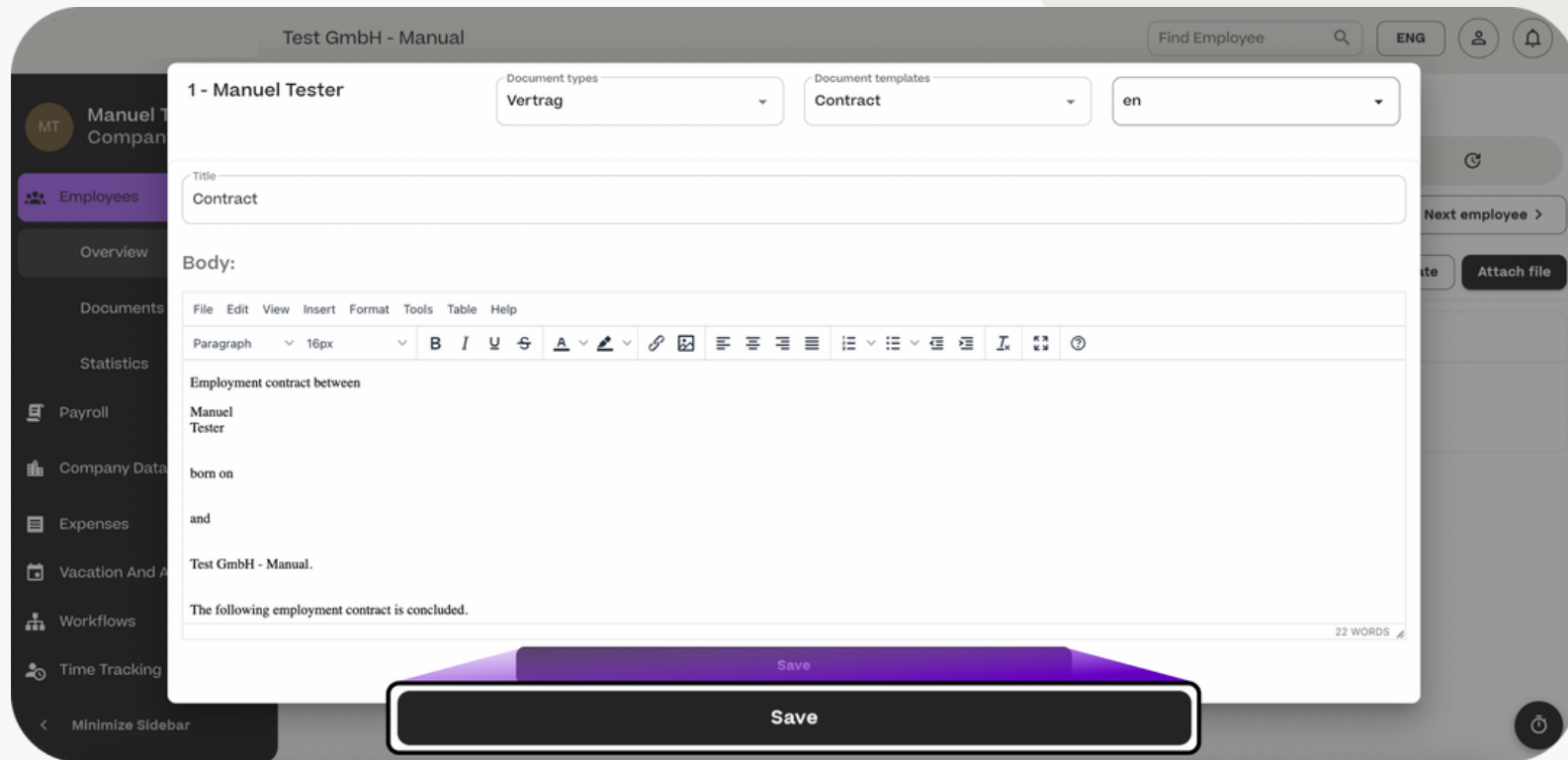
To use a template, click on "Create new template".



→ Employees

– Employee overview - Documents - Create new template

In this example, an employment contract is automatically created for the employee "Manuel Tester" based on a previously created template. For this purpose, the tool takes the entered data of the employee. The document can be customized manually. Click on "Save" to generate a PDF file and save it in the "Documents" area.



→ Employees

– Employee overview - contract

You can enter the employee's contract data under "Overview" > "Employees" > "Contract".

The employee himself can only view this data, but not enter or change it. Enter the contract type, a working time model, the start and, if applicable, the end of the contract as well as a job title and click on "Save".

The screenshot displays the HCSM interface for 'Test GmbH - Manual'. The user is logged in as 'Manuel Tester' (Company). The navigation menu on the left includes 'Employees', 'Overview', 'Documents', 'Statistics', 'Payroll', 'Company Data', 'Expenses', 'Vacation And Absences', 'Workflows', and 'Time Tracking'. The main content area shows the 'Contract Data' form for employee '1 - Manuel Tester'. The form is titled 'VALID CONTRACT' and contains the following fields:

- Contract Type:** Regular (dropdown menu)
- Job specification:** Sales Manager (text input)
- Work time:** Full Time (Vollzeit) (dropdown menu)
- Job duration:** Limited (selected radio button), Unlimited (radio button)
- Start date:** 01/12/2022 (calendar icon)
- End date:** 30/11/2026 (calendar icon)

A 'Save' button is located at the bottom right of the form. A 'Next employee >' button is also visible. The 'CONTRACT DATA' tab is highlighted in the top navigation bar.

→ Employees

– Employee overview - contract

After you have entered the first contract data, you have to enter the working hours, vacation days as well as data on the employee's probationary period.

The screenshot shows the 'Contract Data' form for 'Manuel Tester' in the 'Test GmbH - Manual' system. The 'CONTRACT DATA' tab is highlighted in a purple circle. The form includes the following fields:

- Weekly working hours:** 40,0
- Monday Work time:** 8,0
- Tuesday Work time:** 8,0
- Wednesday Work time:** 8,0
- Thursday Work time:** 8,0
- Friday Work time:** 8,0
- Saturday Work time:** 0,0
- Sunday Work time:** 0,0
- Vacation days per year:** 20
- Probation:** Probation
- Notice period after probationary period:** (dropdown menu)

Buttons for 'Back' and 'Save' are visible at the bottom of the form.

→ Employees

– Employee overview - contract

You and the corresponding employee can see all previously entered master data in the "Contract" area. You can change the data via the "pen" symbol.

Important: To change the working time and salary data, please always create new periods via the "+" symbol and do not change existing entries via the pen symbol (Reason: The adjustment of an existing entry would be retroactive for the entire period.)

Test GmbH - Manual

Find Employee [] ENG [] [] []

VALID CONTRACT

Contract Data

Contract type	Regular
Job specification	Sales Manager
Contract period	Limited
Start date	01/12/2022
End date	30/11/2026
Work time	Full Time (Vollzeit)
Probation	6 months
Notice period during probation	Statutory period of notice
Notice period after probationary period	3 months

Main Salary

START DATE	END DATE	SALARY TYPE	EFFECTIVE SALARY
No data available			

FOLLOW UP CONTRACT

Working Hours (01.12.2022)

Monday	8.0
Tuesday	8.0
Wednesday	8.0
Thursday	8.0
Friday	8.0
Saturday	0.0
Sunday	0.0
Weekly working hours	40.0

Budgets

Absence title	Available	Requested
vacation	2.0	0.0

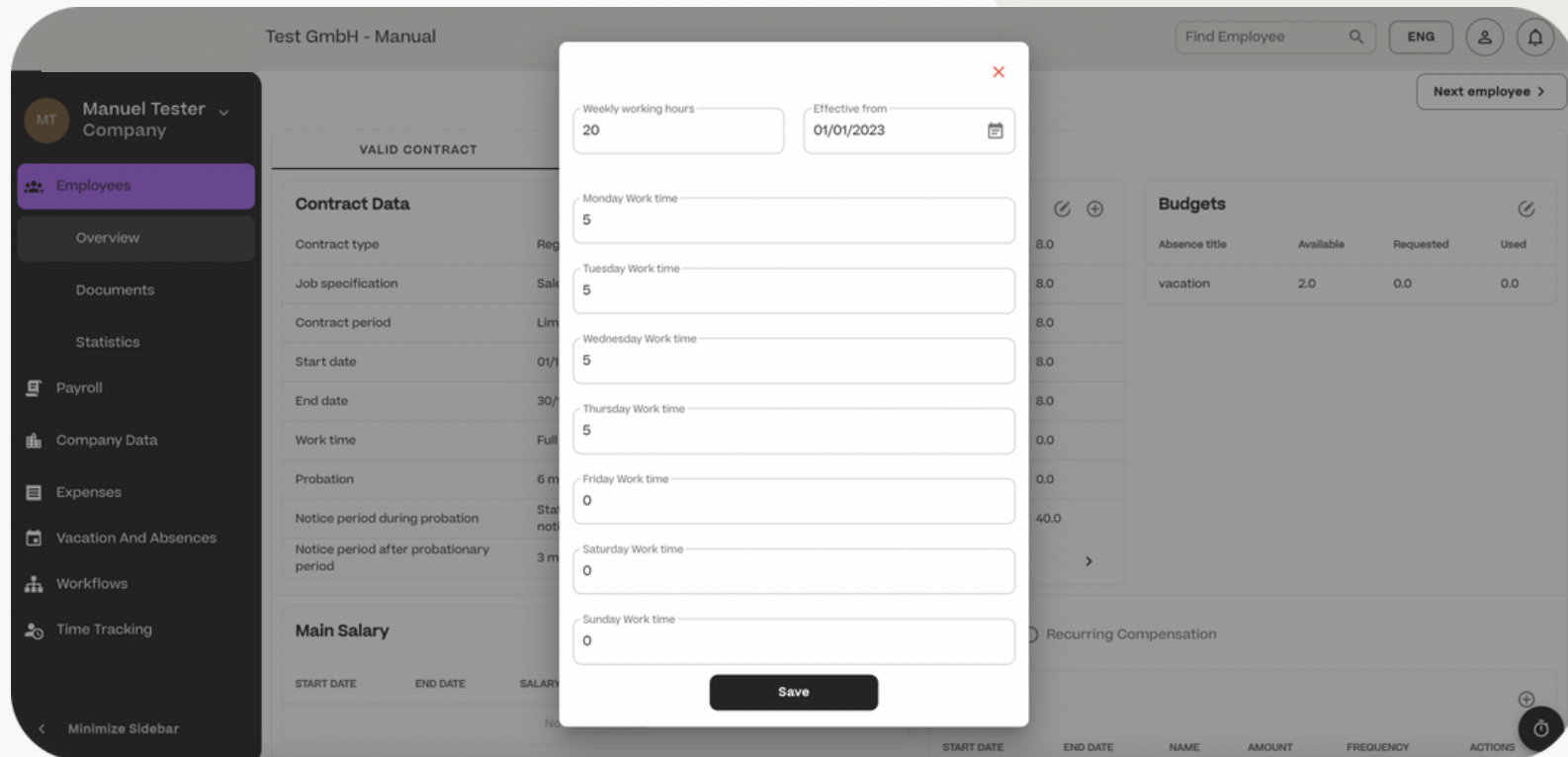
Bonus

START DATE	END DATE	NAME	AMOUNT	FREQUENCY
No data available				

→ Employees

– Employee overview - contract - future change of working hours

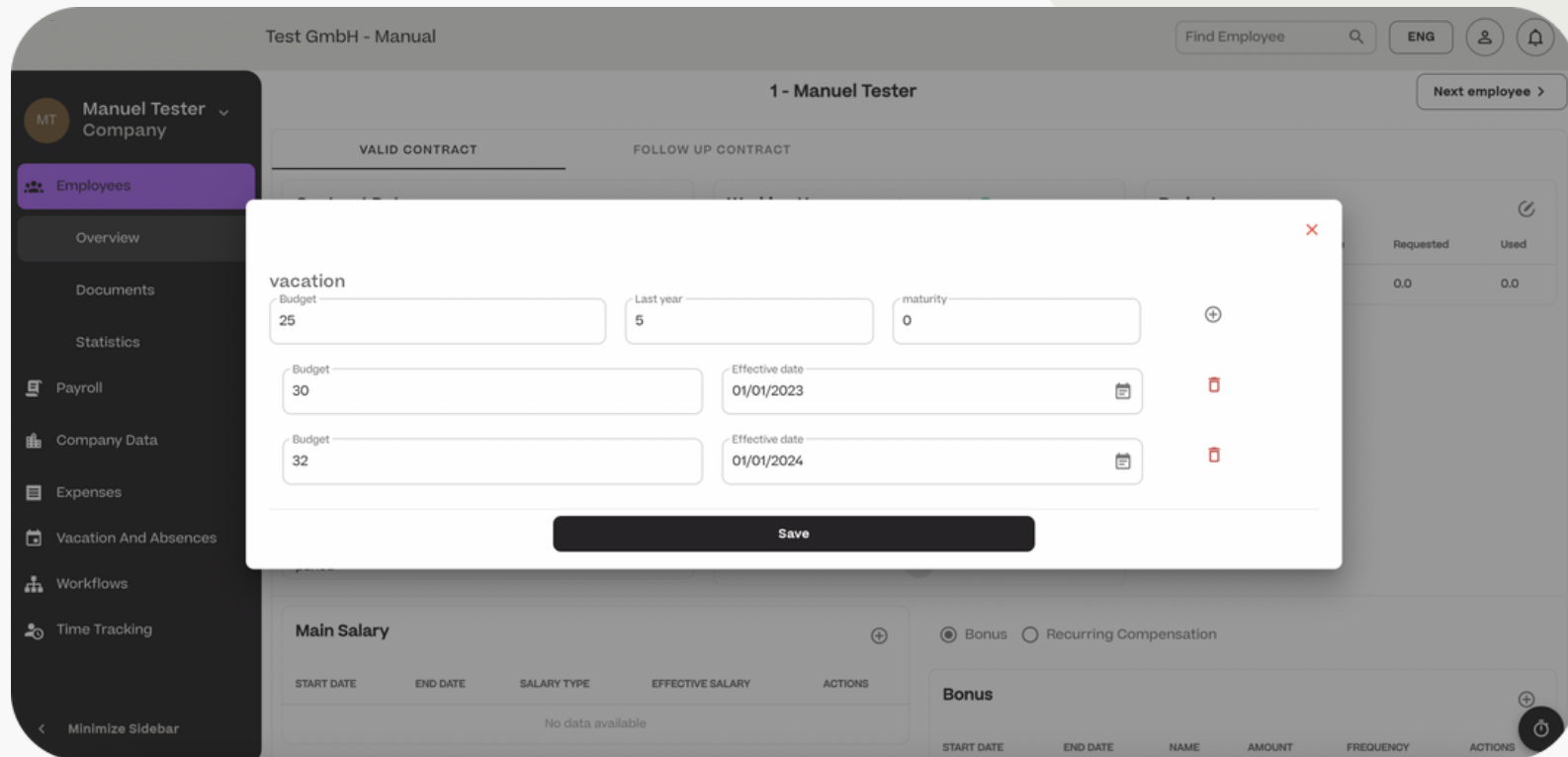
If a change of the working time for an employee becomes necessary for the future, click on the "+" symbol as described before and enter the date from which the change becomes valid. Confirm your entry with "Save".



→ Employees

– Employee overview - contract - future change of working hours

The calculation of the employees' vacation budget is based on the parameters "Contract period" and "Yearly Vacation Budget". For a change of the vacation budget you store the new annual budget together with the date of validity. A reduction according to a partial period is done automatically by the system.



→ Employees

– Employee overview - Contract - Enter salary details

After you have entered the employee's general contract data, working hours and vacation budget, via the "+" symbol you then have to enter the employee's salary as well as possible bonuses or recurring compensation.

The screenshot displays the HCSM interface for an employee named Manuel Tester. The interface is divided into several sections:

- Header:** "Test GmbH - Manual" and "Find Employee" search bar.
- Left Sidebar:** Navigation menu with options: Employees (selected), Overview, Documents, Statistics, Payroll, Company Data, Expenses, Vacation And Absences, Workflows, Time Tracking, and Minimize Sidebar.
- Contract Data (VALID CONTRACT):**

Contract type	Regular
Job specification	Sales Manager
Contract period	Limited
Start date	01/12/2022
End date	30/11/2026
Work time	Full Time (Vollzeit)
Probation	6 months
Notice period during probation	Statutory period of notice
Notice period after probationary period	3 months
- Working Hours (FOLLOW UP CONTRACT):**

Monday	8.0
Tuesday	8.0
Wednesday	8.0
Thursday	8.0
Friday	8.0
Saturday	0.0
Sunday	0.0
Weekly working hours	40.0
- Budgets:**

Absence title	Available	Requested	Used
vacation	2.0	0.0	0.0
- Main Salary:** A table with columns: START DATE, END DATE, SALARY TYPE, EFFECTIVE SALARY. It shows "No data available" and a "+" icon to add data.
- Bonus:** A table with columns: START DATE, END DATE, NAME, AMOUNT, FREQUENCY. It shows "No data available" and a "+" icon to add data.

→ Employees

– Employee overview - Contract - Enter salary details

For the main salary, enter the salary type, the calculation period, the effective salary and the start date of salary payments and click "Save".

The screenshot displays the 'Test GmbH - Manual' interface. On the left is a sidebar with navigation options: Employees (selected), Overview, Documents, Statistics, Payroll, Company Data, Expenses, Vacation And Absences, Workflows, and Time Tracking. The main area is divided into 'VALID CONTRACT' and 'FOLLOW UP CONTRACT' sections. The 'Contract Data' table includes fields for Contract type (Regular), Job specification (Sales Manager), Contract period (Limited), Start date (01/12/2022), End date (30/11/2026), Work time (Full Time (Vollzeit)), Probation (6 months), and Notice periods. The 'Working Hours' table lists days from Monday to Sunday with their respective hours (Monday-Friday: 8.0, Saturday: 0.0, Sunday: 0.0, Weekly working hours: 40.0). Below these is the 'Main Salary' section with a table for salary entries. A modal window on the right is open for 'Enter salary details', showing 'Salary type' set to 'Fix salary', 'Calculation period' set to 'Monthly', 'Effective Salary' set to '3000', and 'Start date' set to '01/12/2022'. A 'Save' button is visible at the bottom of the modal.

→ Employees

– Employee overview - Contract - Bonus / Recurring Compensation

For any bonus or recurring compensation, enter the period of payments, frequency of payment, name of payment and amount. Then click "save".

The screenshot displays the 'Test GmbH - Manual' interface. On the left is a sidebar with navigation options: Manuel Tester Company, Employees (selected), Overview, Documents, Statistics, Payroll, Company Data, Expenses, Vacation And Absences, Workflows, Time Tracking, and Minimize Sidebar. The main area is divided into 'VALID CONTRACT' and 'FOLLOW UP CONTRACT' sections. The 'VALID CONTRACT' section includes 'Contract Data' (Contract type: Regular, Job specification: Sales Manager, Contract period: Limited, Start date: 01/12/2022, End date: 30/11/2026, Work time: Full Time (Vollzeit), Probation: 6 months, Notice period during probation: Statutory period of notice, Notice period after probationary period: 3 months) and 'Main Salary' (Start date: 01/12/2022, End date: 30/11/2026, Salary type: Fix salary, Effective salary: 3,000.0). The 'FOLLOW UP CONTRACT' section includes 'Working Hours' (Monday: 8.0, Tuesday: 8.0, Wednesday: 8.0, Thursday: 8.0, Friday: 8.0, Saturday: 0.0, Sunday: 0.0, Weekly working hours: 40.0) and 'Budgets' (Absence title: vacation). A modal form on the right is open for entering a 'Bonus'. It contains fields for Start date (01/12/2022), End date (31/12/2022), Frequency (Yearly), Name (Bonus), and Amount (500). There is an 'Inactive' checkbox and a 'Save' button.

→ Employees

– Employee overview - Contract - Enter future salary changes

When an employee has a salary change taking effect in the future, click on the "+" icon and enter the new salary information. This consists of the new salary as well as the new effective date.

Test GmbH - Manual

Find Employee ENG

Manuel Tester Company
MT

Employees

Overview

Documents

Statistics

Payroll

Company Data

Expenses

Vacation And Absences

Workflows

Time Tracking

Minimize Sidebar

VALID CONTRACT

Contract Data

Contract type	Regular
Job specification	Sales Manager
Contract period	Limited
Start date	01/12/2022
End date	30/11/2026
Work time	Full Time (Vollzeit)
Probation	6 months
Notice period during probation	Statutory period of notice
Notice period after probationary period	3 months

FOLLOW UP CONTRACT

Working Hours (01.12.2022)

Monday	8.0
Tuesday	8.0
Wednesday	8.0
Thursday	8.0
Friday	8.0
Saturday	0.0
Sunday	0.0
Weekly working hours	40.0

Budgets

Absence title	Available	Requested	Used
vacation	2.0	0.0	0.0

Main Salary

START DATE	END DATE	SALARY TYPE	EFFECTIVE SALARY
01/12/2022	30/11/2026	Fix salary	3,000.0

Bonus Recurring Compensation

Bonus

START DATE	END DATE	NAME	AMOUNT	FREQUENCY	ACTIONS
No data available					

→ Employees

– Employee overview - Contract - Create follow-up contract

If the type of employment relationship of an employee changes in the future, then a follow-up contract can be created. Here, exactly the same data is requested as described above.

The contract view always shows the contract that is valid at the current time.

The screenshot shows the 'Contract Data' view for employee '1 - Manuel Tester'. The interface includes a sidebar with navigation options like 'Overview', 'Documents', 'Statistics', 'Payroll', 'Company Data', 'Expenses', 'Vacation And Absences', 'Workflows', and 'Time Tracking'. The main content area has tabs for 'PERSONAL', 'ORGANIZATION', 'BANK DATA', 'TAX DATA', 'DOCUMENTS', and 'CONTRACT DATA'. The 'CONTRACT DATA' tab is active, showing a 'VALID CONTRACT' and a 'FOLLOW UP CONTRACT' section. The 'FOLLOW UP CONTRACT' section is highlighted with a purple callout box. Below it, there is a 'Main Salary' section with radio buttons for 'Main Salary', 'Bonus', and 'Recurring Compensation'. A 'Budgets' table is also visible on the right.

VALID CONTRACT		FOLLOW UP CONTRACT	
Contract type	Regular	Monday	8.0
Job specification	Sales Manager	Tuesday	8.0
Contract period	Limited	Wednesday	8.0
Start date	01/12/2022	Thursday	8.0
End date	30/11/2026	Friday	8.0
Work time	Full Time (Vollzeit)	Saturday	0.0
Probation	6 months	Sunday	0.0
Notice period during probation	Statutory period of notice	Weekly working hours	40.0
Notice period after probationary period	3 months		

Absence title	Available	Requested	Used
vacation	2.0	0.0	0.0

→ Employees

– Employee overview - change history

In the change history, all changes that have been made to the master data of the respective employee over time are visible. The date and time of the change and the person who made the change are noted.

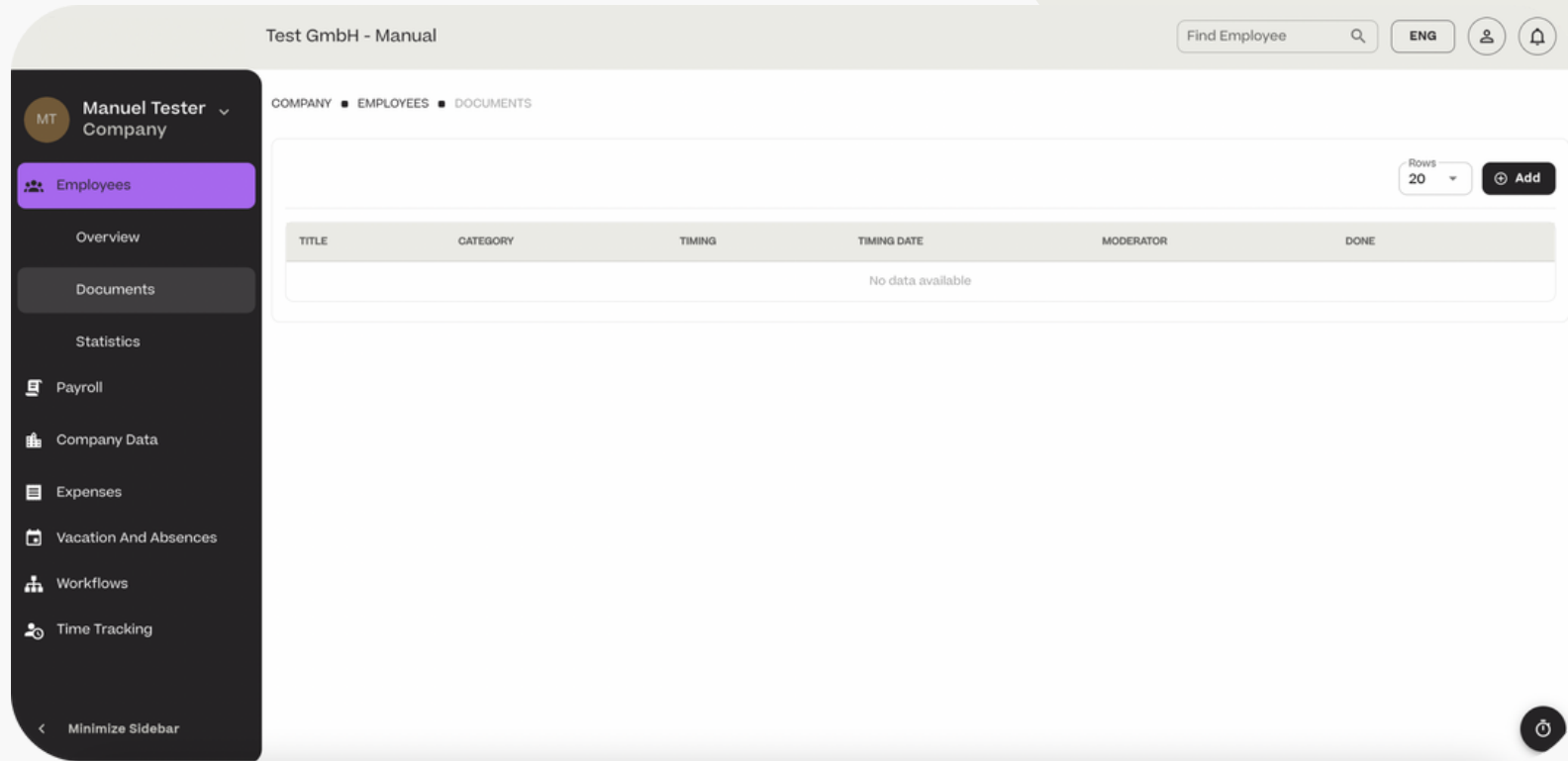
The screenshot shows the 'Test GmbH - Manual' interface. The top navigation bar includes a search box for 'Find Employee', a language selector set to 'ENG', and user profile icons. The left sidebar lists various menu items: 'Manuel Tester Company', 'Employees' (highlighted), 'Overview', 'Documents', 'Statistics', 'Payroll', 'Company Data', 'Expenses', 'Vacation And Absences', 'Workflows', and 'Time Tracking'. The main content area is titled '1 - Manuel Tester' and features a 'Refresh' button (a circular arrow icon) highlighted with a purple border. Below this is a table with the following columns: FIELD NAME, TABLE NAME, ORIGINAL VALUE, NEW VALUE, STATUS, CHANGED AT, USER, and a column with red 'X' and green checkmark icons. The table contains seven rows of change history data.

<input type="checkbox"/>	FIELD NAME	TABLE NAME	ORIGINAL VALUE	NEW VALUE	STATUS	CHANGED AT	USER	<input type="checkbox"/>
<input type="checkbox"/>	First name	Master Data		Manuel	Unprocessed	20/12/2022 09:52:14	Sophie Gilliam	<input type="checkbox"/>
<input type="checkbox"/>	Last name	Master Data		Tester	Unprocessed	20/12/2022 09:52:14	Sophie Gilliam	<input type="checkbox"/>
<input type="checkbox"/>	Do you have children?	Health insurance data		f	Unprocessed	20/12/2022 09:52:14	Sophie Gilliam	<input type="checkbox"/>
<input type="checkbox"/>	Tax number not available	Tax details		f	Unprocessed	20/12/2022 09:52:14	Sophie Gilliam	<input type="checkbox"/>
<input type="checkbox"/>	Mandatory internship?	Master Data		f	Unprocessed	20/12/2022 09:52:14	Sophie Gilliam	<input type="checkbox"/>
<input type="checkbox"/>	Request for pension insurance	Health insurance data		f	Unprocessed	20/12/2022 09:52:14	Sophie Gilliam	<input type="checkbox"/>

→ Employees

– Employee overview - Employees - Documents

This function allows you to quickly upload documents for individual employees or predefined groups. To do this, select the desired employees or a group of employees, for example based on departments via "Add" and upload the required documents.



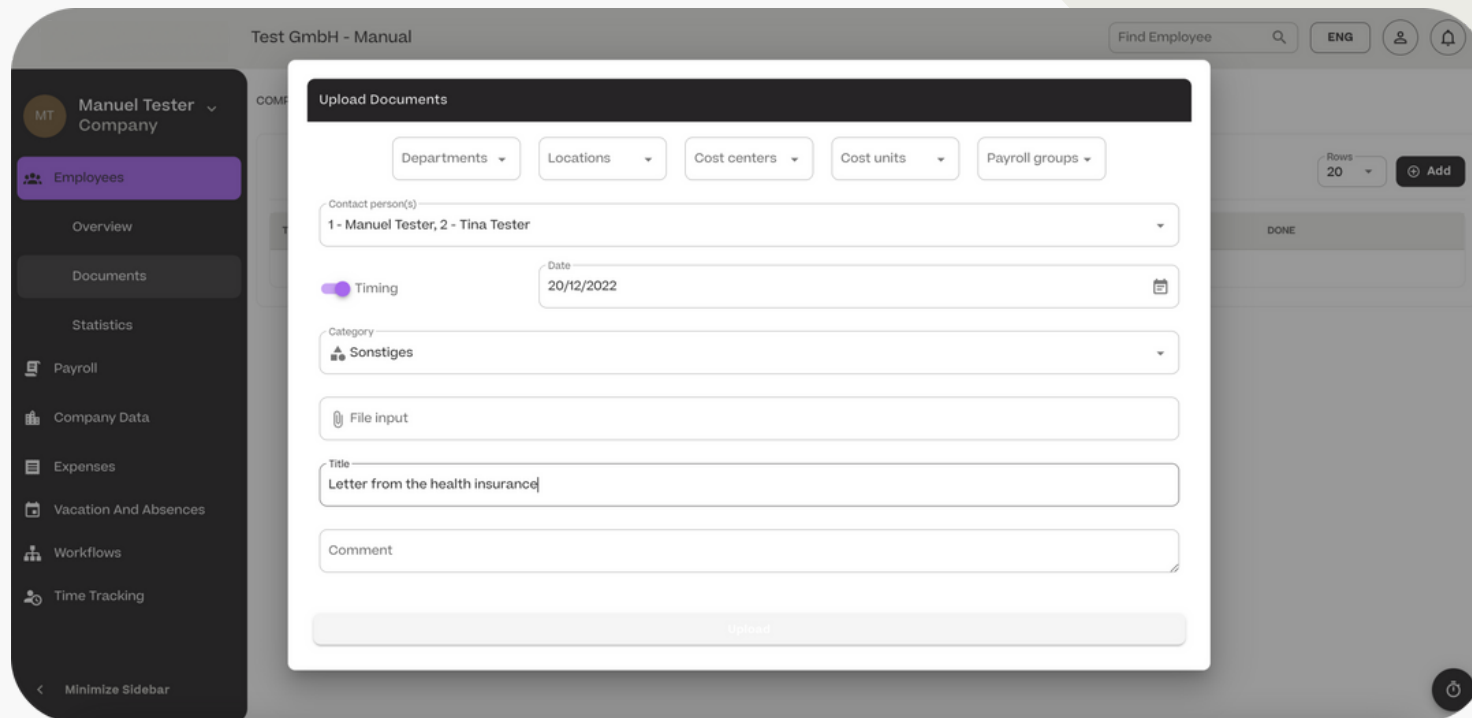
→ Employees

– Employee overview - Employees - Documents

Documents are uploaded to all selected employees.

If groups of employees are selected on the basis of order criteria such as "department", individual employees can also be deactivated for the upload.

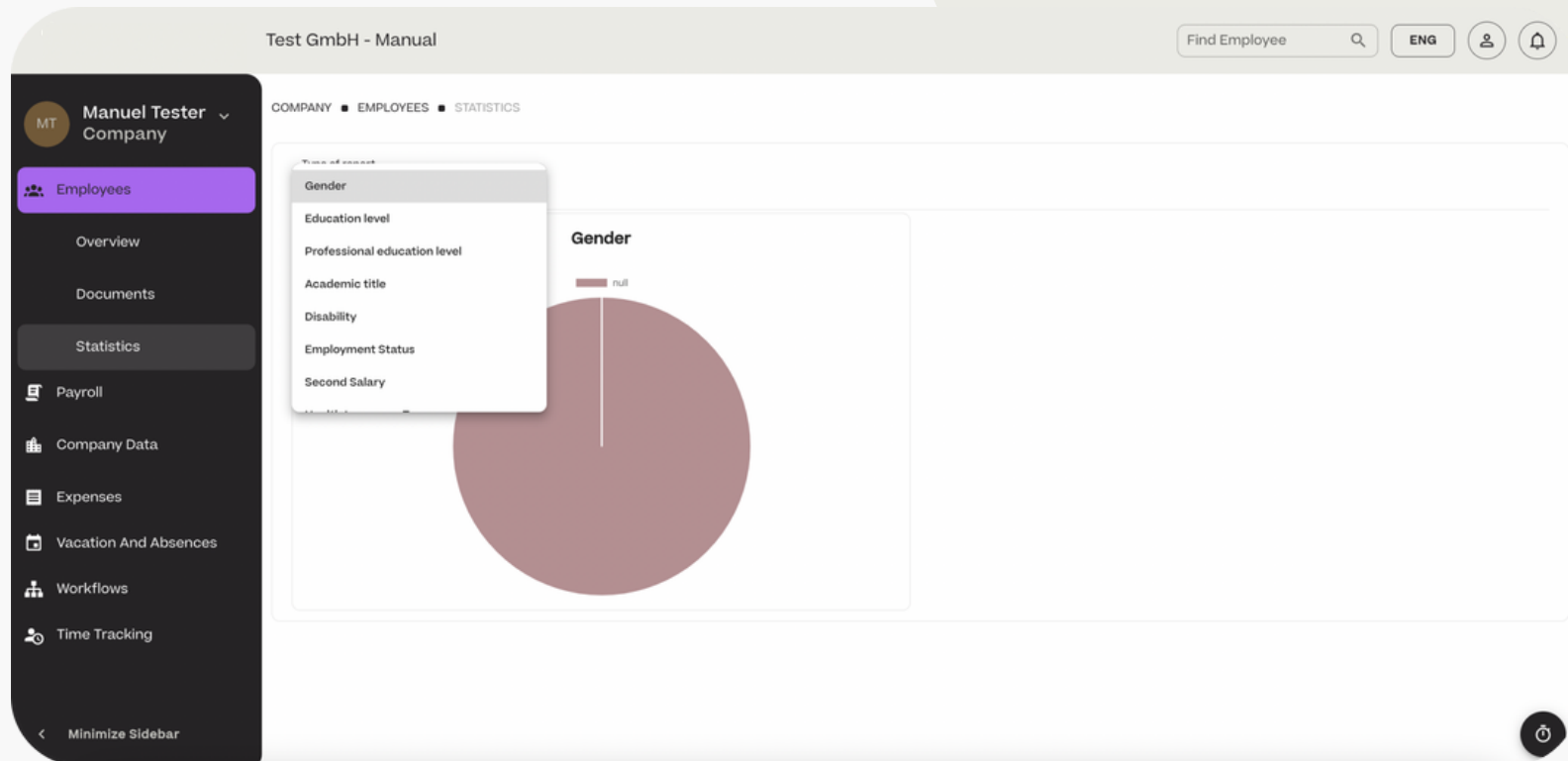
In addition, a time for the upload can be predefined so that the documents are allocated with a time delay.



→ Employees

– Employee overview - Access to evaluations

In the "Employees" > "Statistics" area, you can see different evaluations based on the master data of the employees.



Payroll accounting

HCSM

→ Payroll accounting

– Approval - Approve salaries

In the "Payroll" > "Overview and Approval" section you can find the payroll of all employees of your company for a given month. The current month is always displayed. To select another month, click on the desired month in the calendar and confirm with "OK". You can also search for employees in the overview and filter by payroll groups.

Test GmbH - Manual

Find Employee ENG

COMPANY ■ PAYROLL ■ OVERVIEW AND APPROVAL

OVERVIEW AND APPROVAL EMPLOYEES INCOMPLETE DATA

Find Employee

Payroll groups PayrollGroup 1

December, 2022 Current month

December, 2022 Current month

Export Salary approval

EMPLOYEE LIST

<input type="checkbox"/>	NUMBER	NAME	SALARY	BONUS	RECURRING COMPENSATION	EXPENSES	ADDITIONAL PAYMENTS	ACTIONS
<input type="checkbox"/>	1	Manuel Tester	3,000.0 € (01/12/2022 - 31/12/2022)	Bonus: 500.0 €		Bewertungskosten: Angefordert am: 21.12.2022, 8:40 AM: 250.0 €		

→ Payroll accounting

– Approval - add additional payments

To add an additional payment to an employee's salary or wages that are not yet stored in a expense or in the contract, click on the "+" symbol.

The screenshot shows the HCSM payroll system interface for 'Test GmbH - Manual'. The user is 'Manuel Tester' (MT) and is viewing the 'OVERVIEW AND APPROVAL' section. The interface includes a sidebar with navigation options like 'Personal', 'Employees', 'Payroll', 'Overview and approval', 'Reports', 'Salary Types', 'Exchange Document', 'Company Data', 'Expenses', 'Vacation And Absences', and 'Workflows'. The main content area displays an 'EMPLOYEE LIST' table with columns for NUMBER, NAME, SALARY, BONUS, RECURRING COMPENSATION, EXPENSES, ADDITIONAL PAYMENTS, and ACTIONS. A single employee, Manuel Tester, is listed with a salary of 3,000.0 € and a bonus of 500.0 €. A green '+' button is highlighted in the 'ADDITIONAL PAYMENTS' column for this employee, indicating where to click to add a new payment. The interface also shows filters for 'Find Employee', 'Payroll groups', and 'December, 2022'.

NUMBER	NAME	SALARY	BONUS	RECURRING COMPENSATION	EXPENSES	ADDITIONAL PAYMENTS	ACTIONS
1	Manuel Tester	3,000.0 € (01/12/2022 - 31/12/2022)	Bonus: 500.0 €			Bewirtungskosten: Angefordert am: 21.12.2022, 8:40 AM: 250.0 €	

→ Payroll accounting

– Approval - add additional payments

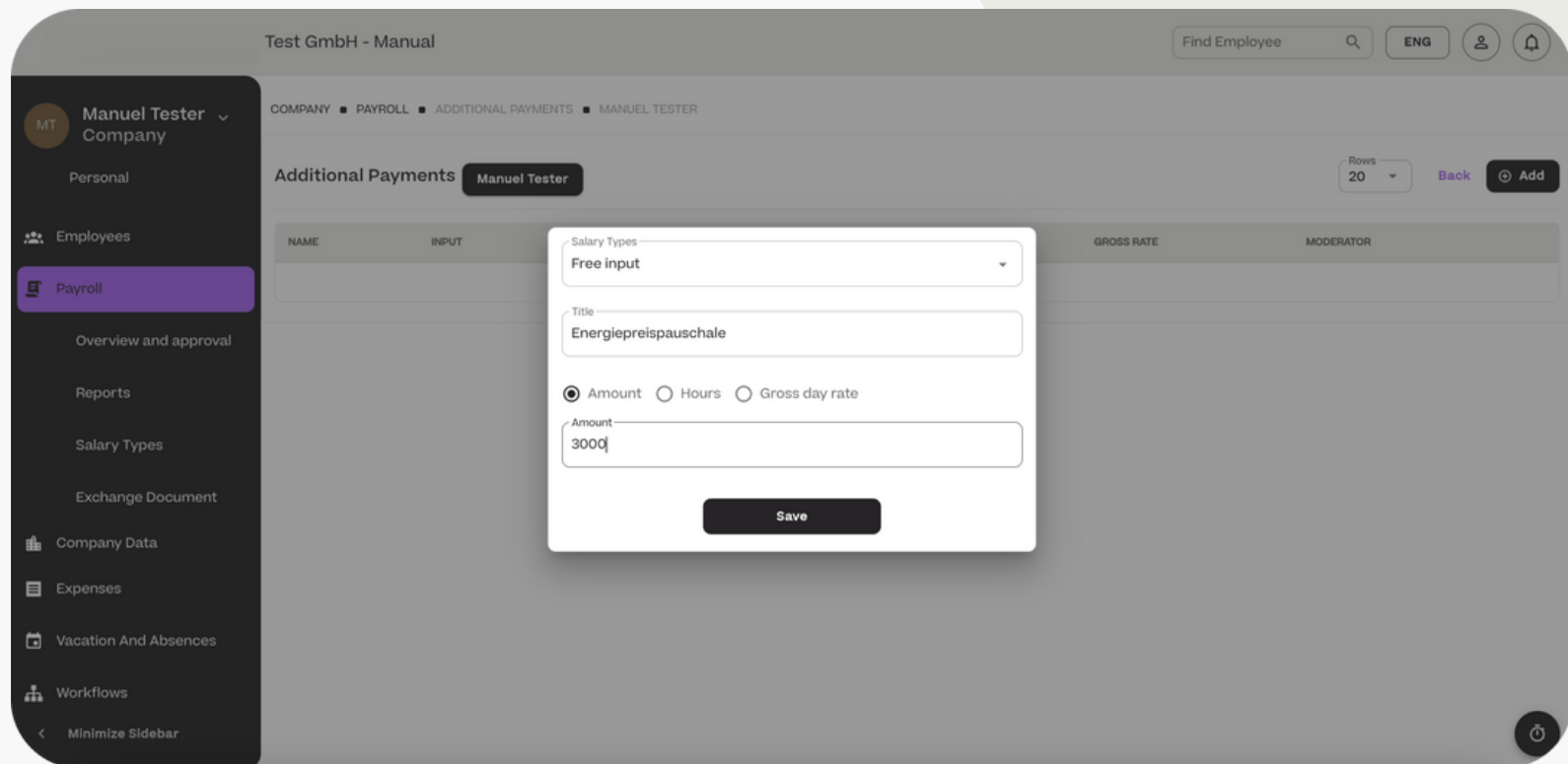
Then click on "+" Add.

The screenshot shows the HCSM interface for 'Test GmbH - Manual'. The user is logged in as 'Manuel Tester' (MT) from the 'Company'. The breadcrumb trail is 'COMPANY > PAYROLL > ADDITIONAL PAYMENTS > MANUEL TESTER'. The main section is titled 'Additional Payments' for 'Manuel Tester'. A table with columns 'NAME', 'INPUT', 'AMOUNT', 'NUMBER OF DAYS/HOURS', 'GROSS RATE', and 'MODERATOR' is shown, but it contains 'No data available'. A purple callout box highlights the '+ Add' button in the top right corner of the table area. The left sidebar contains navigation options: Personal, Employees, Payroll (highlighted), Overview and approval, Reports, Salary Types, Exchange Document, Company Data, Expenses, Vacation And Absences, Workflows, and Minimize Sidebar. The top right has a search bar 'Find Employee', language 'ENG', and user profile icons.

→ Payroll accounting

– Approval - add additional payments

Then specify the salary type, the title and the amount, the hours worked or the gross day rate and click "Save".



→ Payroll accounting

– Approval - add additional payments

After entering the additional payment, you will find the amount under "Additional payments" in the payroll.

The screenshot shows the HCSM payroll system interface for 'Test GmbH - Manual'. The user is 'Manuel Tester' from 'Company'. The main navigation menu on the left includes: Personal, Employees, Payroll (highlighted), Overview and approval, Reports, Salary Types, Exchange Document, Company Data, Expenses, Vacation And Absences, Workflows, and Minimize Sidebar. The main content area is titled 'COMPANY ■ PAYROLL ■ OVERVIEW AND APPROVAL' and has tabs for 'OVERVIEW AND APPROVAL', 'NEW EMPLOYEES', and 'INCOMPLETE DATA'. Below the tabs, there are search and filter options: 'Find Employee', 'Payroll groups' (set to 'PayrollGroup 1'), 'December, 2022', and 'Current month'. There are also buttons for 'Export' and 'Salary approval'. The 'EMPLOYEE LIST' table has columns: NUMBER, NAME, SALARY, BONUS, RECURRING COMPENSATION, EXPENSES, ADDITIONAL PAYMENTS, and ACTIONS. The first row shows employee 'Manuel Tester' with a salary of 3,000.0 € and a bonus of 500.0 €. The 'ADDITIONAL PAYMENTS' column for this employee is highlighted with a purple callout box that reads: 'ADDITIONAL PAYMENTS' and 'Energiepreispauschale: 3,000.0 €'. Other details in the row include 'Bewertungskosten: Anberichtigt am: 21.12.2022, 8:40 AM: 250.0 €' and a green plus icon in the actions column.

→ Payroll accounting

– Approval - add / remove expenses

To add additional previously unapproved expenses to an employee's salary or wages or to remove approved expenses, click the appropriate icon.

The screenshot displays the 'Test GmbH - Manual' payroll overview. The left sidebar shows the user 'Manuel Tester' and various menu items like 'Personal', 'Employees', 'Payroll', and 'Overview and approval'. The main content area is titled 'COMPANY ■ PAYROLL ■ OVERVIEW AND APPROVAL' and includes tabs for 'OVERVIEW AND APPROVAL', 'NEW EMPLOYEES', and 'INCOMPLETE DATA'. A search bar and filters for 'Payroll groups' (PayrollGroup 1) and 'December, 2022' are present. Below, an 'EMPLOYEE LIST' table shows details for Manuel Tester, including salary (3,000.0 €) and expenses (Bewirtungskosten: 250.0 €). A callout box highlights the 'ACTIONS' column with a plus icon and a document icon, indicating where to click to manage expenses.

NUMBER	NAME	SALARY	BONUS	RECURRING COMPENSATION	EXPENSES	ADDITIONAL PAYMENTS	ACTIONS
1	Manuel Tester	3,000.0 € (01/12/2022 - 31/12/2022)	Bonus: 500.0 €		Bewirtungskosten: 250.0 € Angefordert am: 21.12.2022, 8:40 AM	Energiepreispauschale: 3,000.0 €	

→ Payroll accounting

– Approval - Remove displays

You will then be taken to the expense overview for the respective employee. Via the "-" sign you can remove an already approved expense for the corresponding payroll.

The screenshot shows the HCSM payroll accounting interface for 'Test GmbH - Manual'. The user is 'Manuel Tester' (MT) from 'Company'. The interface includes a sidebar with navigation options like 'Personal', 'Employees', 'Payroll', 'Overview and approval', 'Reports', 'Salary Types', 'Exchange Document', 'Company Data', 'Expenses', 'Vacation And Absences', and 'Workflows'. The main content area is divided into two sections: 'Unpaid expenses' and 'Added to this payroll'. The 'Unpaid expenses' section shows a table with columns for 'TITLE', 'TOTAL EXPENSES', 'TOTAL ADVANCE PAYMENTS', and 'REMAIN FOR REFUND', but it currently displays 'No data available'. The 'Added to this payroll' section shows a table with the same columns, containing two entries: 'Bewirtungskosten: Angefordert am: 21.12.2022, 8:40 AM' with 250.0 in expenses and 0 in payments, and 'Telefonkosten: Angefordert am: 21.12.2022, 8:56 AM' with 50.0 in expenses and 0 in payments. A red minus sign icon is visible next to the second entry, indicating it can be removed. The interface also features a 'Find Employee' search bar, a language selector set to 'ENG', and a 'Rows' dropdown set to 20.

TITLE	TOTAL EXPENSES	TOTAL ADVANCE PAYMENTS	REMAIN FOR REFUND
No data available			

TITLE	TOTAL EXPENSES	TOTAL ADVANCE PAYMENTS	REMAIN FOR REFUND
Bewirtungskosten: Angefordert am: 21.12.2022, 8:40 AM	250.0	0	250.0
Telefonkosten: Angefordert am: 21.12.2022, 8:56 AM	50.0	0	50.0

→ Payroll accounting

– Approval - Add expenses

Using the "+" sign or the "+ Add this payroll" button, you can add a display that has not yet been approved or previously removed for the corresponding payroll.

Test GmbH - Manual

Find Employee ENG

COMPANY ■ PAYROLL ■ SAVED REQUESTS ■ MANUEL TESTER

Manuel Tester Company
Personal
Employees
Payroll
Overview and approval
Reports
Salary Types
Exchange Document
Company Data
Expenses
Vacation And Absences
Workflows
Minimize Sidebar

Unpaid expenses

<input checked="" type="checkbox"/>	TITLE	TOTAL EXPENSES	TOTAL ADVANCE PAYMENTS	REMAIN FOR REFUND	
<input checked="" type="checkbox"/>	Telefonkosten: Angefordert am: 21.12.2022, 8:56 AM	50.0	0	50.0	

Rows: 20

Added to this payroll

TITLE	TOTAL EXPENSES	TOTAL ADVANCE PAYMENTS	REMAIN FOR REFUND	
Bewirtungskosten: Angefordert am: 21.12.2022, 8:40 AM	250.0	0	250.0	-

Rows: 20

→ Payroll accounting

– Approval - export salaries

To export the salaries of a month, first select the corresponding positions and then click the "Export" button.

The screenshot shows the HCSM payroll system interface. The user is logged in as 'Manuel Tester' (MT) for 'Company'. The main navigation sidebar on the left includes options like 'Personal', 'Employees', 'Payroll', 'Overview and approval', 'Reports', 'Salary Types', 'Exchange Document', 'Company Data', 'Expenses', 'Vacation And Absences', and 'Workflows'. The main content area is titled 'Test GmbH - Manual' and shows the 'OVERVIEW AND APPROVAL' section. It includes a search bar for 'Find Employee', a dropdown for 'Payroll groups' (set to 'PayrollGroup 1'), and a date selector for 'December, 2022'. Below this is an 'EMPLOYEE LIST' table with columns for 'NAME', 'SALARY', 'BONUS', 'RECURRING COMPENSATION', 'EXPENSES', 'STATUS', and 'ACTIONS'. The table contains one entry for 'Manuel Tester' with a salary of 3,000.0 € and a bonus of 500.0 €. The 'ACTIONS' column for this entry has an 'Export' button highlighted with a purple box. There is also a 'Salary approval' button in the top right of the table area.

NAME	SALARY	BONUS	RECURRING COMPENSATION	EXPENSES	STATUS	ACTIONS
Manuel Tester	3,000.0 € (01/12/2022 - 31/12/2022)	Bonus: 500.0 €		Bewirtungskosten: Angefordert am: 21.12.2022, 8:40 AM: 250.0 € Telefonkosten: Angefordert am: 21.12.2022, 8:56 AM: 50.0 €		Export Salary approval

→ Payroll accounting

– Approval - release salaries

In order for payroll accounting to process your company's salaries, you first have to approve them. To approve the salaries, select the corresponding positions and click the "Salary approval" button.

Test GmbH - Manual

Find Employee ENG

COMPANY ■ PAYROLL ■ OVERVIEW AND APPROVAL

OVERVIEW AND APPROVAL NEW EMPLOYEES INCOMPLETE DATA

Find Employee Payroll groups PayrollGroup 1 December, 2022 Current month

ALL SALARY WAGE

EMPLOYEE LIST

<input checked="" type="checkbox"/>	NAME	SALARY	BONUS	RECURRING COMPENSATION	EXPENSES
<input checked="" type="checkbox"/>	Manuel Tester	3,000.0 € (01/12/2022 - 31/12/2022)	Bonus: 500.0 €		Bewirtungskosten: Angefordert am: 21.12.2022, 8:40 AM: 250.0 € Telefonkosten: Angefordert am: 21.12.2022, 8:56 AM: 50.0 € Energiepreispauschale: 3,000.0 €

Salary approval

→ Payroll accounting

– Approval - Approve salaries

Once the salary is approved, the salary is marked "Approved" and the salary components can no longer be edited.

The screenshot shows the 'Test GmbH - Manual' interface. The left sidebar contains navigation options: Personal, Employees, Payroll (highlighted), Overview and approval, Reports, Salary Types, Exchange Document, Company Data, Expenses, Vacation And Absences, Workflows, and Minimize Sidebar. The main content area is titled 'COMPANY ■ PAYROLL ■ OVERVIEW AND APPROVAL' and has tabs for 'OVERVIEW AND APPROVAL', 'NEW EMPLOYEES', and 'INCOMPLETE DATA'. Below the tabs are search and filter options: 'Find Employee', 'Payroll groups' (set to 'PayrollGroup 1'), 'December, 2022', and 'Current month'. There are also 'ALL', 'SALARY', and 'WAGE' filters. The 'EMPLOYEE LIST' section includes an 'Export' button and a 'Salary approval' button. A table lists employee records with columns: NUMBER, NAME, SALARY, BONUS, RECURRING COMPENSATION, EXPENSES, ADDITIONAL PAYMENTS, and ACTIONS. The first record for 'Manuel Tester' is highlighted with a green 'Approved' badge and a callout box. The table data is as follows:

NUMBER	NAME	SALARY	BONUS	RECURRING COMPENSATION	EXPENSES	ADDITIONAL PAYMENTS	ACTIONS
1	Manuel Tester	3,000.0 € (01/12/2022 - 31/12/2022)	Bonus: 500.0 €		Bewirtungskosten: Angefordert am: 21.12.2022, 8:40 AM: 250.0 € Telefonkosten: Angefordert am: 21.12.2022, 8:56 AM: 50.0 €	Energiepreispauschale: 3,000.0 €	+ ☰

→ Payroll accounting

– Approval - overview of new employees

In the area " Approval" > " New employees" you can see an overview of all new employees of a certain month. The current month is always displayed. To select another month, click on the desired month in the calendar and confirm with "OK". By clicking on the employee's line, you can go directly to the employee's master data and view or change it.

The screenshot shows the HCSM software interface for 'Test GmbH - Manual'. The top navigation bar includes a search box for 'Find Employee', a language selector set to 'ENG', and user profile icons. The main content area is titled 'NEW EMPLOYEES' and is highlighted with a purple rounded rectangle. Below this title, there are tabs for 'OVERVIEW AND APPROVAL' and 'DELETE DATA'. The 'Employees' section shows a table with columns for 'NUMBER', 'CONTRACT TYPE', 'FIRST NAME', and 'LAST NAME'. The table contains one entry: a regular employee named 'Manuel Tester' with the number '1'. The interface also includes a sidebar on the left with navigation options like 'Payroll' and 'Overview and approval', and a 'Minimize Sidebar' button at the bottom.

NUMBER	CONTRACT TYPE	FIRST NAME	LAST NAME
1	Regular employee	Manuel	Tester

→ Payroll accounting

– Approval - Check / complete incomplete data

In the " Approval" > "Incomplete data" area, you can see an overview of all incomplete master data of the company and the employees. The completeness of the data is a requirement for correct accounting. If a data record appears here, please make sure that the data is completed promptly.

Via the "pencil" icon you can enter the missing data directly.

Test GmbH - Manual

Find Employee 🔍 ENG 👤 🔔

COMPANY ■ PAYROLL ■ INCOMPLETE DATA

OVERVIEW AND APPROVAL NEW EMPLOYEES **INCOMPLETE DATA**

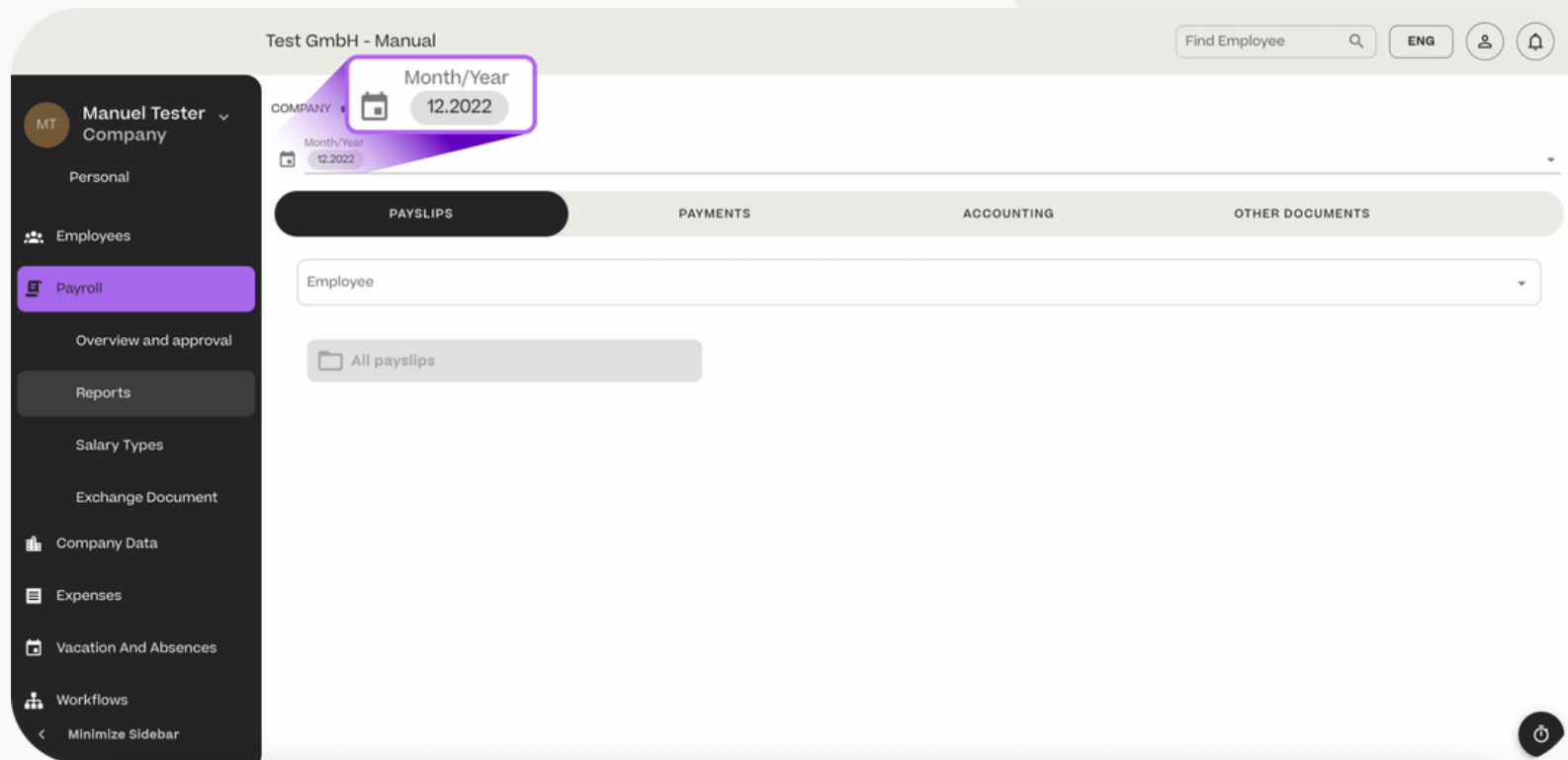
🔍 Search Item 7

NUMBER	FULL NAME	MISSING INFORMATION
	Company Data	30 Information • Additional address information • Fax number • Full time hours
1	Manuel Tester	7 Information • Date of birth • Payee • Payment method • SSN • Insurance type
2	Tina Tester	7 Information • Date of birth • Payee • Payment method • SSN • Insurance type

→ Payroll accounting

– Access reports

All payroll, payment and accounting documents are saved in "Reports". The current month is always displayed. To select another month, click on the desired month in the calendar and confirm with "OK".



→ Payroll accounting

– Salary types - Add salary type

In the "Salary types" area you will find all the salary types that have been created for your company. With a click on "+ Add" you can add further salary types.

Test GmbH - Manual

Find Employee ENG

COMPANY ■ PAYROLL ■ SALARY TYPES

SALARY TYPES OVERTIME RATES

Salary Types

Rows 20

NUMBER	NAME	TYPE OF SALARY	INPUT TYPE	DEFAULT VALUE	
100	Gehalt	Salary	Amount		
101	Korrekturstunden	Wage	Hours		
109	Lohn - Minijob	Wage	Hours		
120	Zeitlohn	Wage	Hours		
130	Festlohn	Wage	Amount		

Add

Manuel Tester Company
Personal
Employees
Payroll
Overview and approval
Reports
Salary Types
Exchange Document
Company Data
Expenses
Vacation And Absences
Workflows
Minimize Sidebar

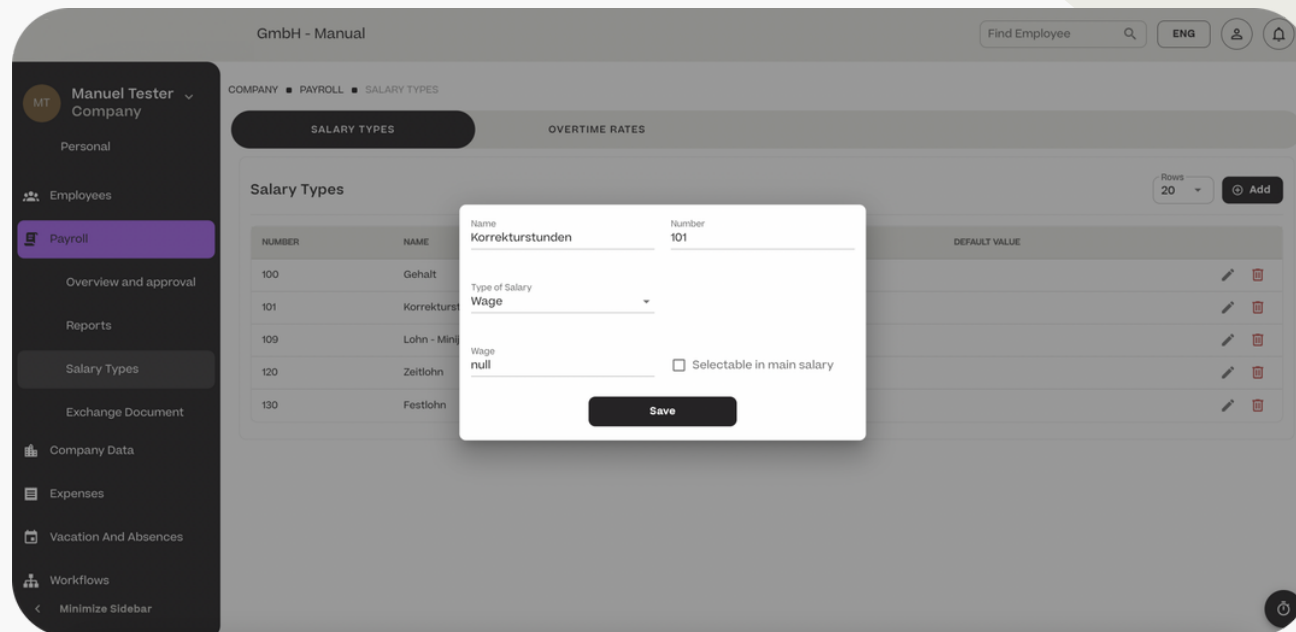
→ Payroll accounting

– Salary types - Add salary type

To do this, set the name, number, select a type of salary.

For this purpose, there are the following options:

- "Salary": payment of a fixed amount on a monthly basis
- "Fixed salary": Payment of a fixed amount on the basis of an average number of hours
- "Hourly wage": Variable payment based on hours worked
- "Other payments": Additional payment in addition to the basic payment



→ Payroll accounting

– Salary types - Add salary type

The "Selectable in main salary" option allows you to make an allocation using the contract data as the main remuneration.

The "Wage" option allows setting the default amount of the compensation component. If this field is not filled, the value must be defined each month in the salary release.

Test GmbH - Manual

Find Employee ENG

COMPANY ■ PAYROLL ■ SALARY TYPES

SALARY TYPES OVERTIME RATES

Salary Types

NUMBER	NAME	DEFAULT VALUE
100	Gehalt	
101	Korrekturstunden	
109	Lohn - Minijob	
120	Zeitlohn	
130	Festlohn	

Rows: 20

Name: Korrekturstunden Number: 101

Type of Salary: Wage

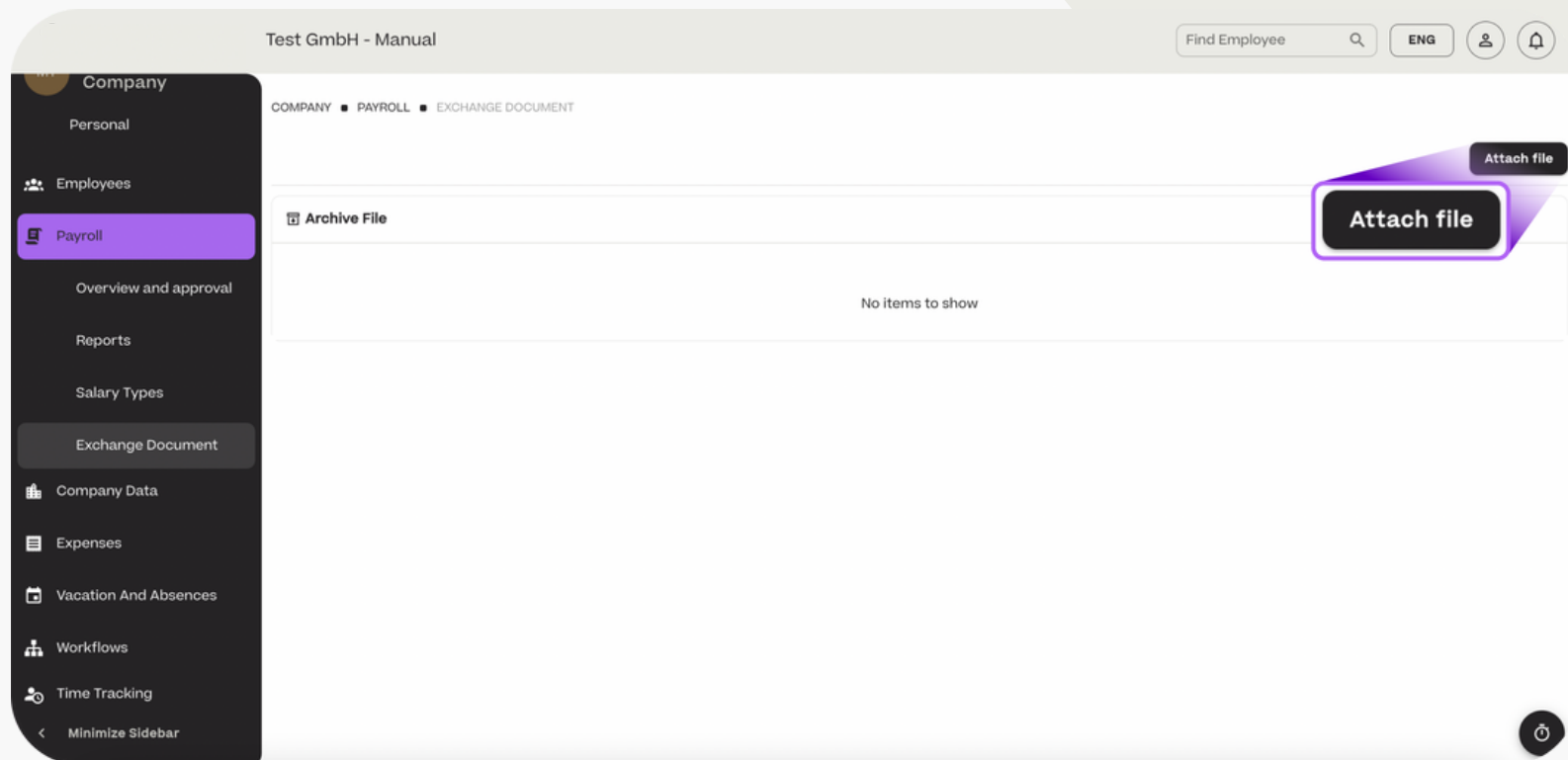
Wage: null Selectable in main salary

Save

→ Payroll accounting

– Exchange folder - document exchange

You can exchange employee-independent documents directly with your payroll office via the Exchange folder. To do this, click on "Attach file", select the relevant document and name it. The document is only visible for the payroll office and for the company, but not for individual employees in the private area.



Company

HCSM

→ Company

– Company - Enter company master data

To ensure that payroll accounting runs properly, it is mandatory that you enter your company master data in the "Company" > "Company Data" area. This is divided into main master data, tax data, accounting data and insurance data.

Test GmbH - Manual

Find Employee 🔍 ENG 👤 🔔

COMPANY ■ SETTINGS ■ COMPANY DATA ■ STAMMDATEN

MAIN TAX DATA ACCOUNTING DATA INSURANCE

G Germany

Name: Test GmbH - Manual Postcode: 52070

Type of legal entity: Limited liability company (GmbH) State: Nordrhein-Westfalen

Represented by: Ms. Mr. Other City: Aachen

Representative name: Manuel Tester Street: Teststraße House number: 4

Phone number: +49123456789 Fax number: +49123456789

Additional address information

Save

→ Company

– Company - change history and approval of changes

In the change history area, all changes to the master data of your company are listed. In the change history you can track all changes and undo them if necessary.

Test GmbH - Manual

Find Employee ENG

COMPANY ■ SETTINGS ■ COMPANY DATA ■ CHANGES HISTORY

MAIN TAX DATA ACCOUNTING DATA INSURANCE

<input type="checkbox"/>	FIELD NAME	TABLE NAME	ORIGINAL VALUE	NEW VALUE	STATUS	CHANGED AT	USER		
<input type="checkbox"/>	House number	Main		4	Unprocessed	20/12/2022 09:50:18	Sophie Gilliam		
<input type="checkbox"/>	Company Structure	Main		Gesellschaft mit beschränkter Haftung	Unprocessed	21/12/2022 13:36:03	Manuel Tester		
<input type="checkbox"/>	Pin liability insurance	Insurance		1234	Unprocessed	21/12/2022 13:36:40			

Company Data

Structure

Access Rights

Inventory

Document templates

Working hours model

Document types

VAT Rates

Cost Categories

Expenses

Minimize Sidebar

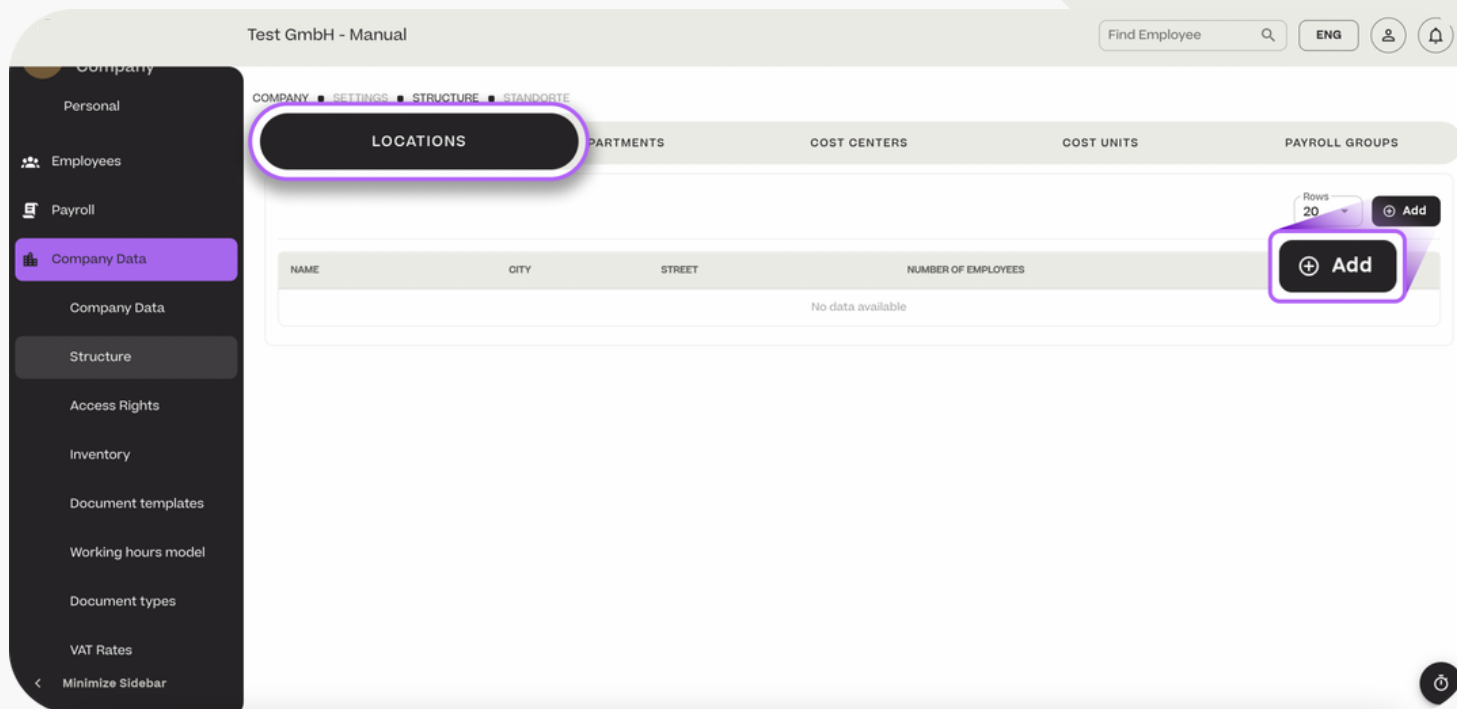
→ Company

– Company structure - Create location

In the "Company structure" area you can create datasets for the organizational structure.

The creation of different locations is mainly relevant for determining the holidays at the work location of the respective employee. If no location is created, the holidays of the company location are automatically used as a basis.

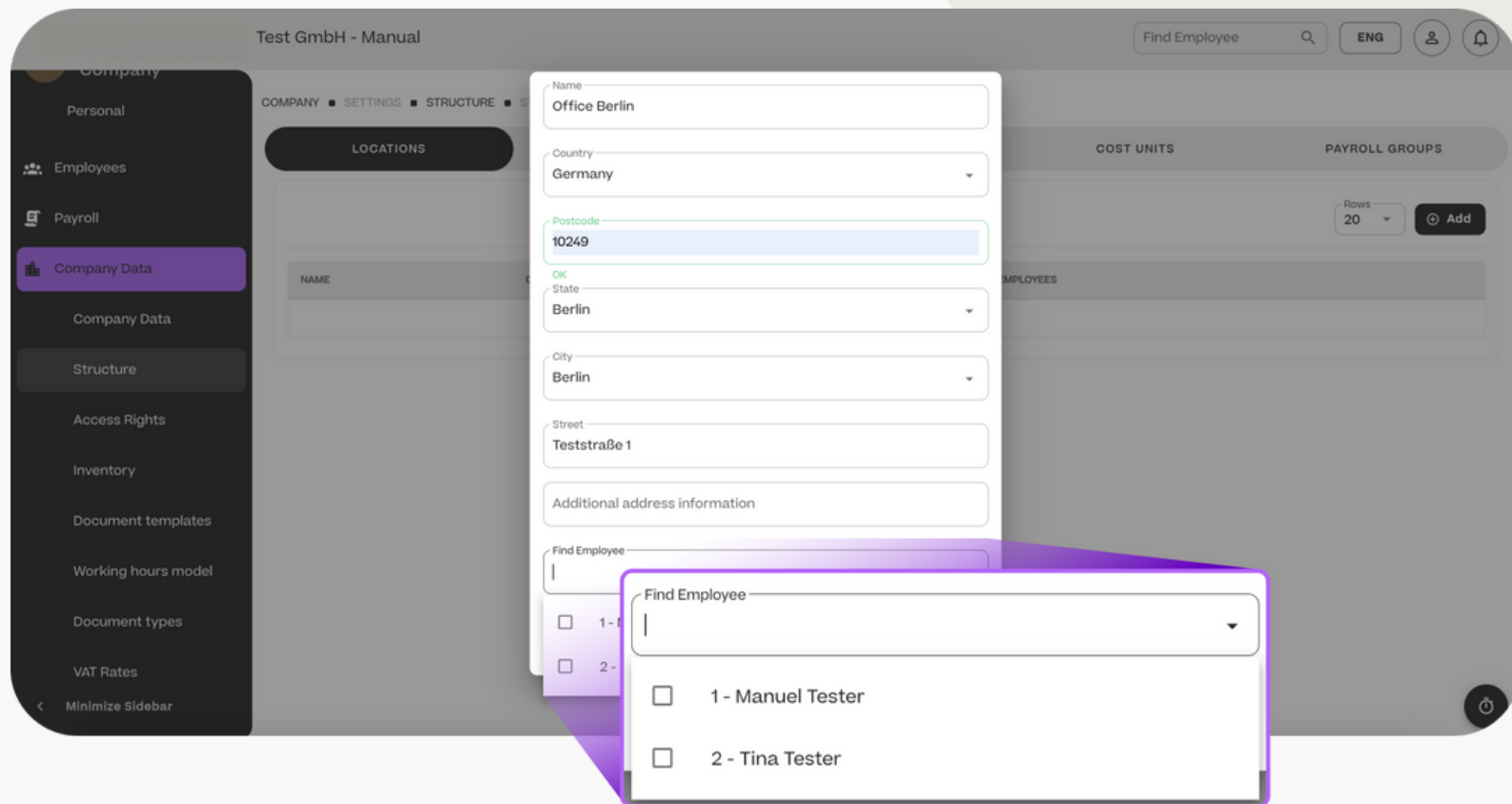
To add a new location, click on "+ Add".



→ Company

– Company structure - Create location

Enter the address data of the location and select the employees who work at this location. You can also assign the location via the path "Employees" > "Overview" > "Employee" > "Organization" (cf. p. 14)

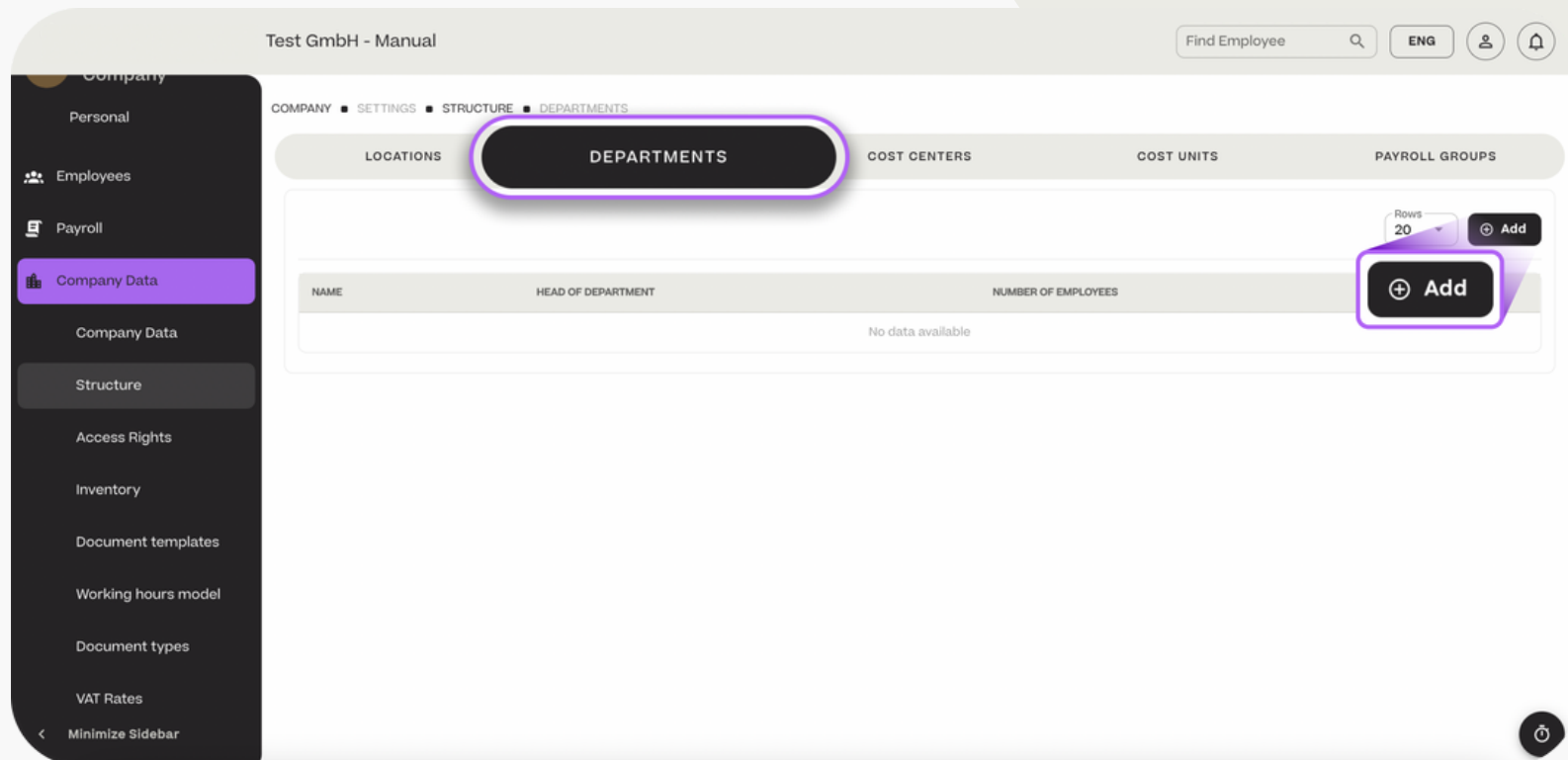


→ Company

– Company structure - Create department

You can also create different departments. These are particularly relevant for approvals of absences.

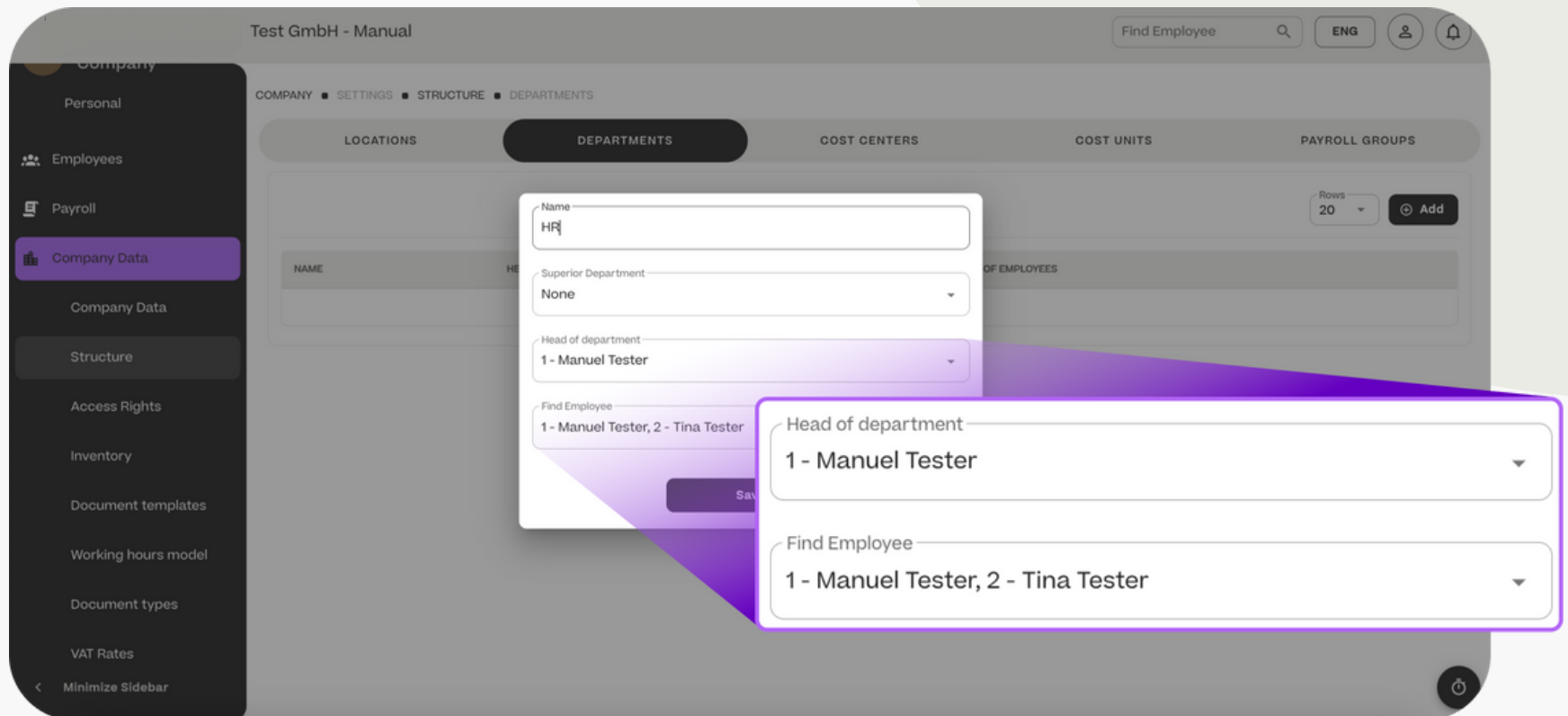
To do this, click on "+ Add" in the "Company structure" > "Departments" area.



→ Company

– Company structure - Create department

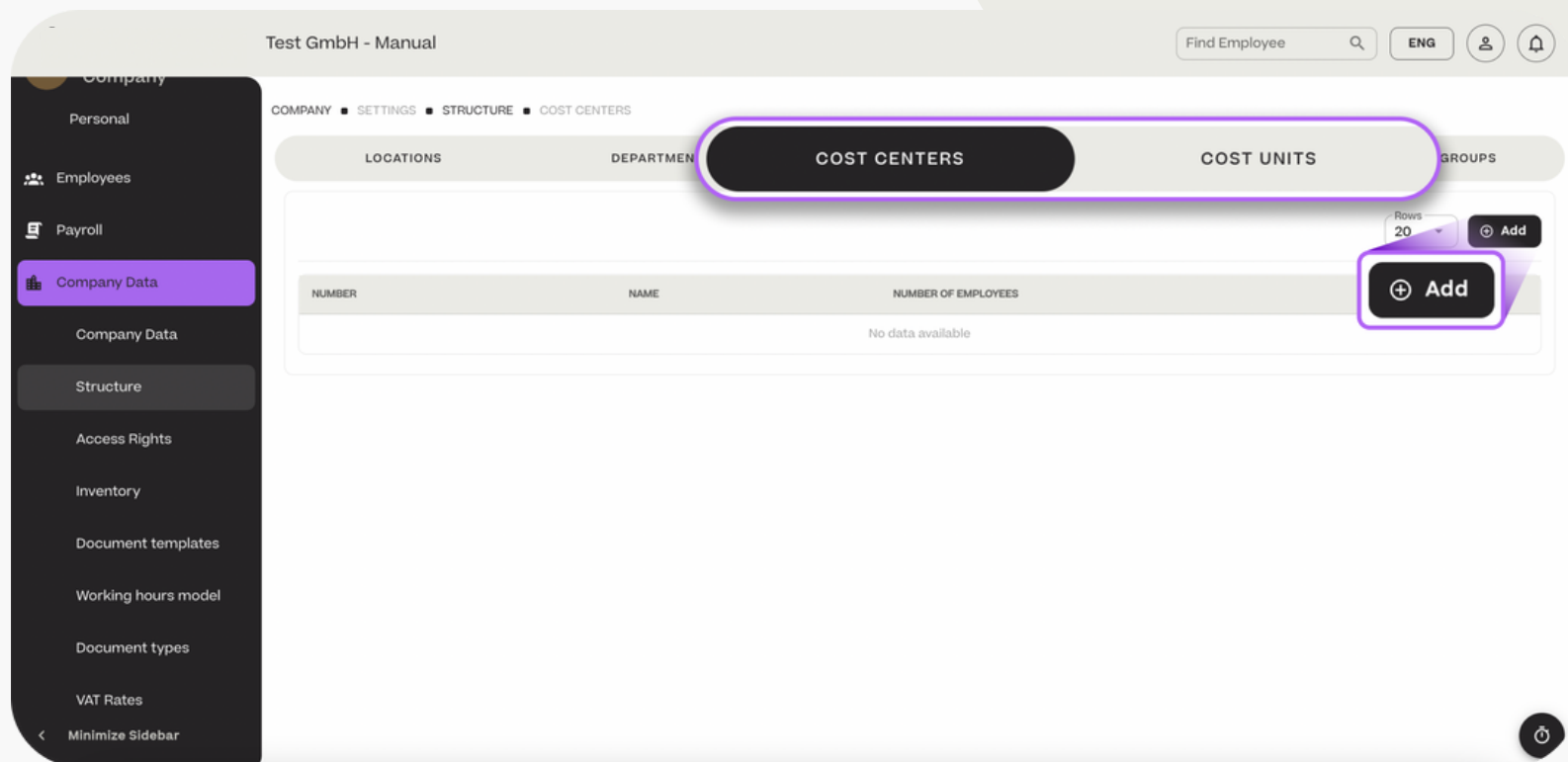
Enter the department name, a possible superior department, the head of the department and the employees of the department. Here you can also assign your employees to a department via the way of the employee master data.



→ Company

- Company structure - create additional organizational data

Similarly, you can optionally create cost centers and cost units via the "+ Add" button and assign them to the employees of your company.

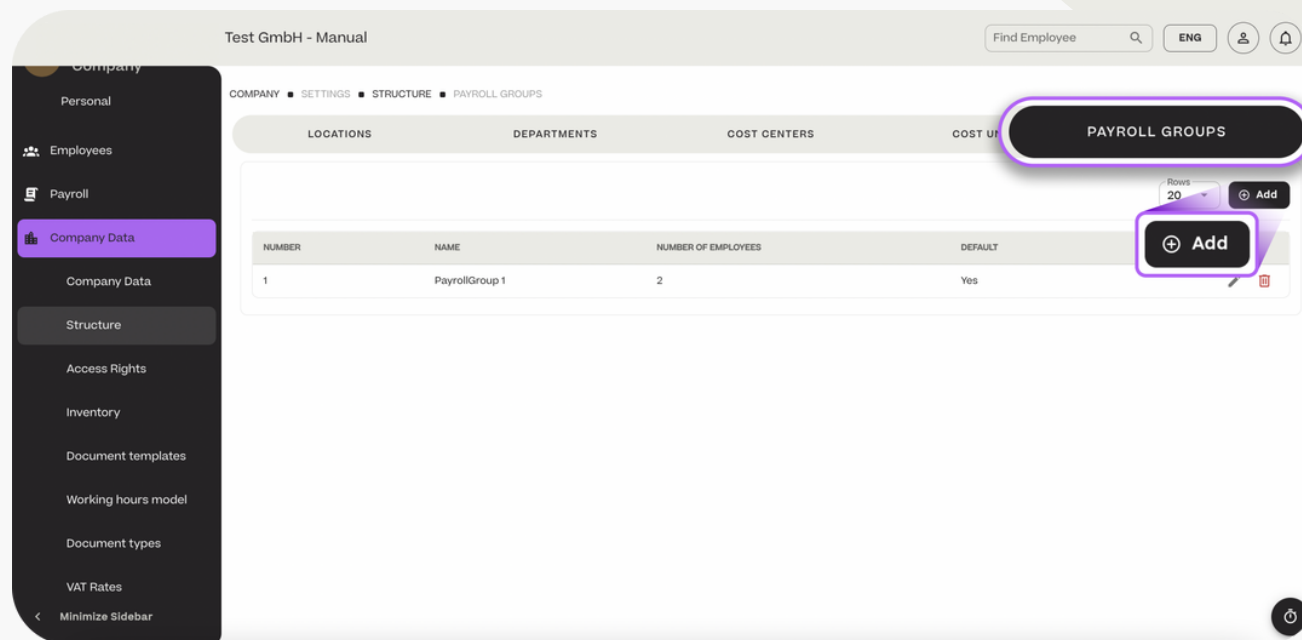


→ Company

– Enterprise structure - Create payroll groups

If your company runs payroll for groups of employees at different times, you can define payroll groups for them in the company master data. Each payroll group must be released separately for payroll accounting in the "Payroll" area (Cf. page 34).

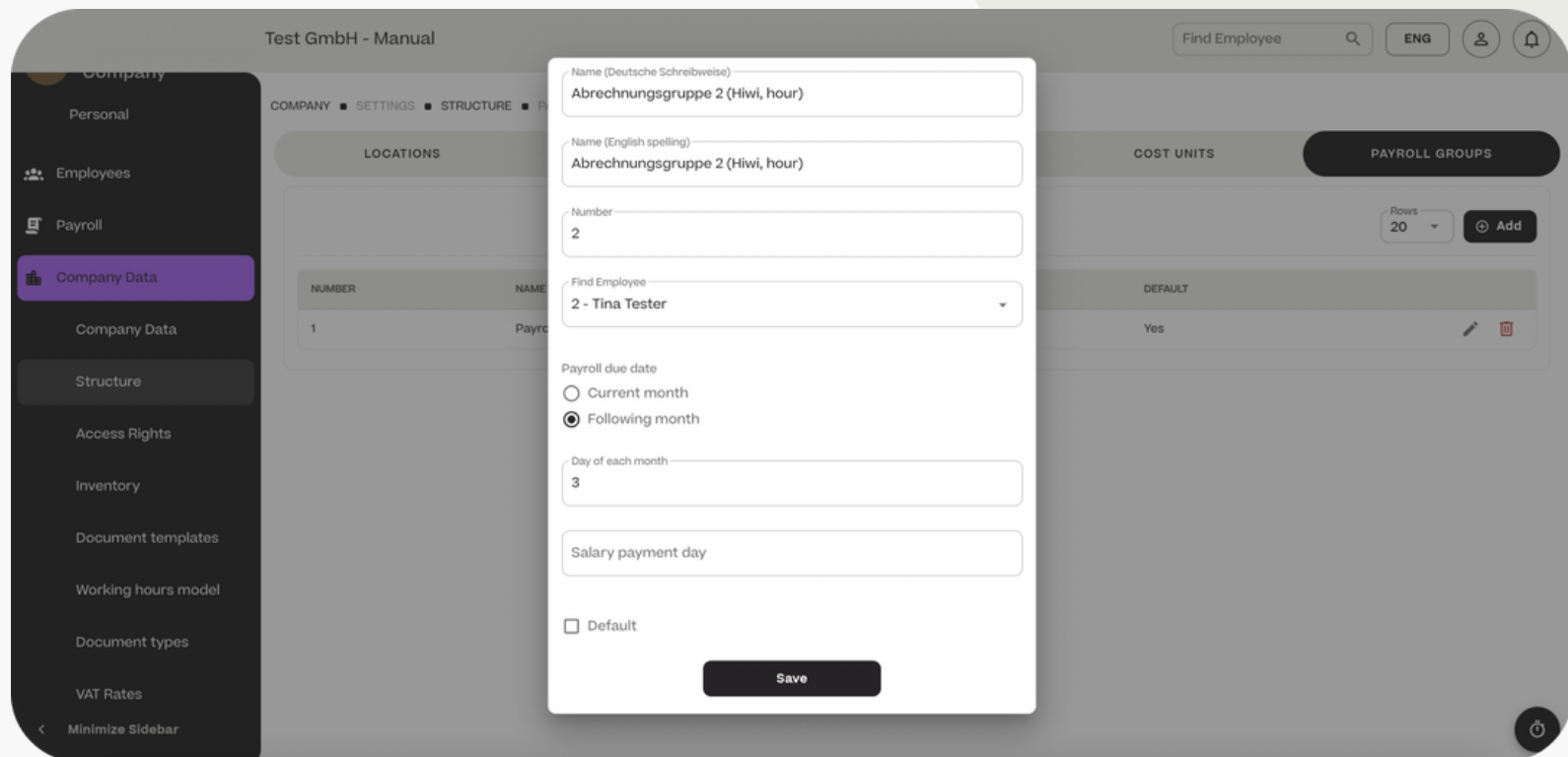
To do this, click on "+ Add" in the "Structure" area under "Payroll groups".



→ Company

– Enterprise structure - Create payroll groups

For each billing group you can define the due date of the billing. This date is relevant for the automatic reminders in the "Workflows" area



→ Company

– Rights management - overview of rights profiles

When you add a new employee, you have to add a user role to him/her (cf. p. 4).

You can choose from a pre-selection (employee = Mitarbeiter, employer = Arbeitgeber, consultant = Berater) or create your own role with individual rights.

To do this, click on "+ Add".

Test GmbH - Manual

Find Employee ENG

COMPANY ■ SETTINGS ■ ACCESS RIGHTS ■ PROFILE

PROFILES

Rows: 20 Hide private profiles Add

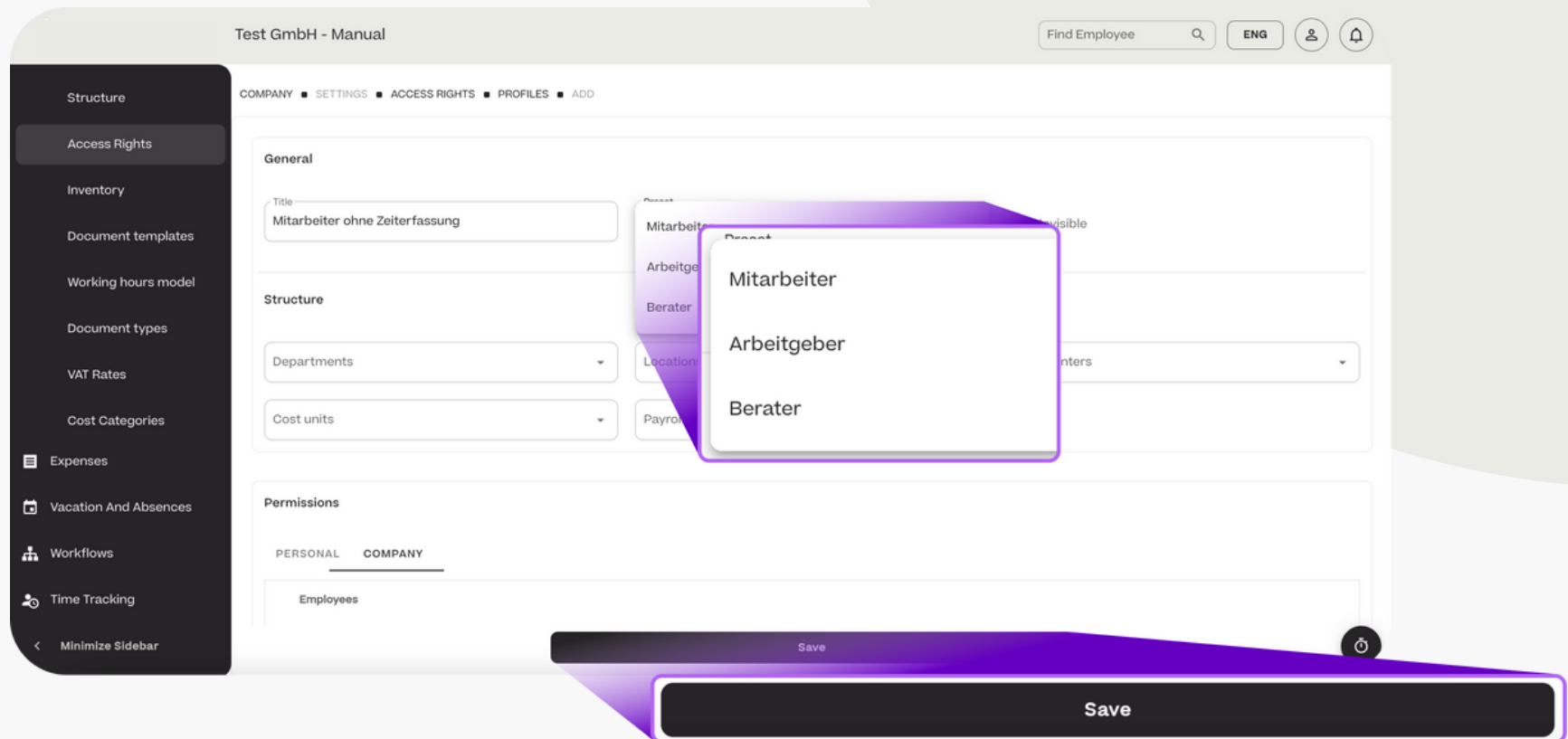
TITLE	INVISIBLE	
Mitarbeiter	No	
Arbeitgeber	No	
Berater	No	

Add

→ Company

– Rights management - Add rights profile

Select a preset role on which to base the settings of your new role, and then click "Save".



→ Company

– Rights management - Add rights profile

The previously created profile now appears with the name of the selected base profile in the profile overview.

To rename the new role and set the rights, open the new role by clicking on it.

The screenshot shows the 'Test GmbH - Manual' interface. The left sidebar contains navigation options: Manuel Tester Company, Employees, Payroll, Company Data (highlighted), Company Data, Structure, Access Rights, Inventory, Document templates, Working hours model, Document types, VAT Rates, Cost Categories, Expenses, and Minimize Sidebar. The main content area is titled 'COMPANY ■ SETTINGS ■ ACCESS RIGHTS ■ PROFILE' and has tabs for 'PROFILES' and 'USERS'. The 'PROFILES' tab is active, showing a table with the following data:

TITLE	INVISIBLE	
Mitarbeiter	No	
Arbeitgeber	No	
Berater	No	
Mitarbeiter	No	

A purple callout box highlights the first row of the table, containing the text 'Mitarbeiter' and 'No'.

→ Company

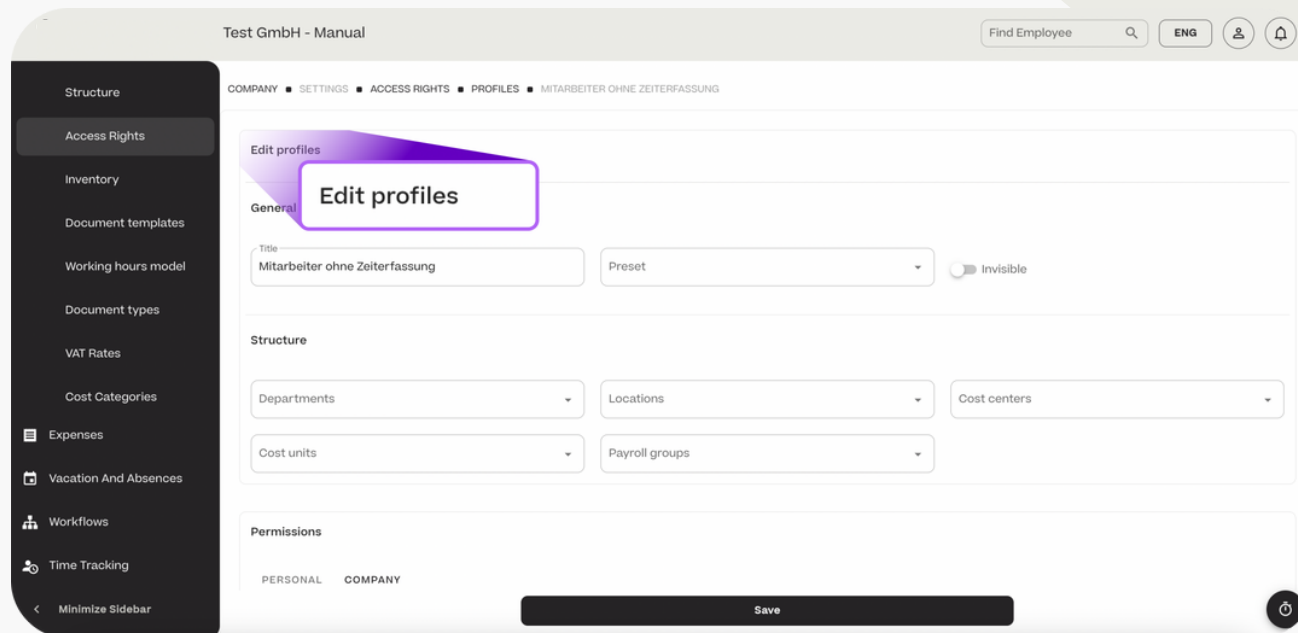
– Rights management - Add rights profile

Name your new role with a unique name.

In this example, the employees should not use time tracking. For this reason, the role is named "Employee without time tracking".

If company structure characteristics are defined for the role, the individual rights concept is restricted to individual company characteristics.

Example: You create a rights profile for a department manager.



→ Company

– Rights management - Add rights profile

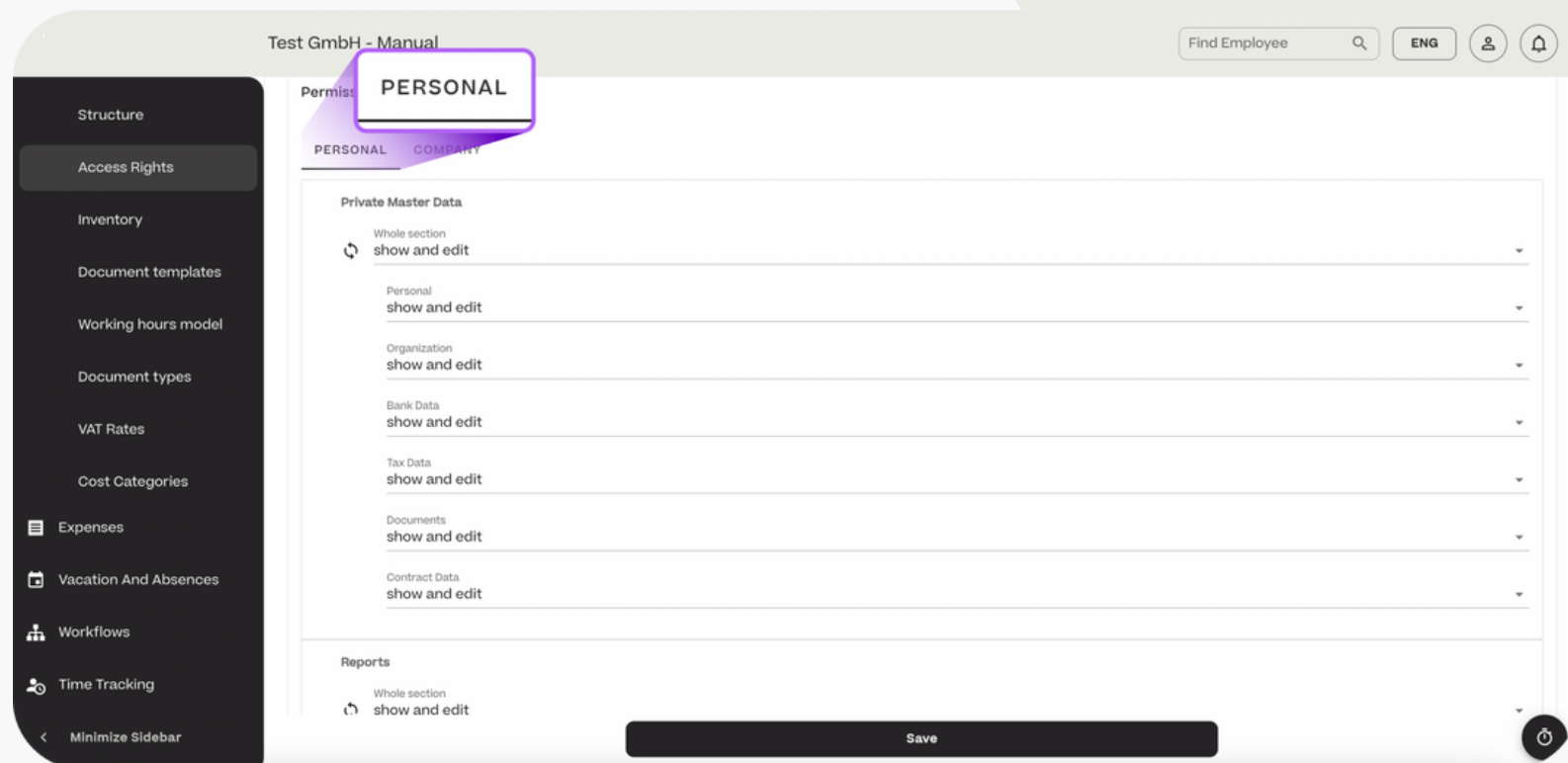
Then you need to adjust the permissions of the profile. In the "Employees without time tracking" example, the employees should not have access to the company data. Consequently, "no permission" is granted for the entire "Company" area.

The screenshot displays the 'Test GmbH - Manual' interface. On the left is a dark sidebar with navigation items: Structure, Access Rights, Inventory, Document templates, Working hours model, Document types, VAT Rates, Cost Categories, Expenses, Vacation And Absences, Workflows, Time Tracking, and Minimize Sidebar. The main content area is titled 'Permissions' and has two tabs: 'PERSONAL' and 'COMPANY'. The 'COMPANY' tab is selected and highlighted with a purple callout box. Below the tabs, there are three sections: 'Employees', 'Employees Master Data', and 'Accounting Data'. Each section has a dropdown menu for permissions, all of which are set to 'no permission'. A purple callout box highlights the 'Employees' section dropdown. At the bottom of the main area is a 'Save' button and a refresh icon.

→ Company

– Rights management - Add rights profile

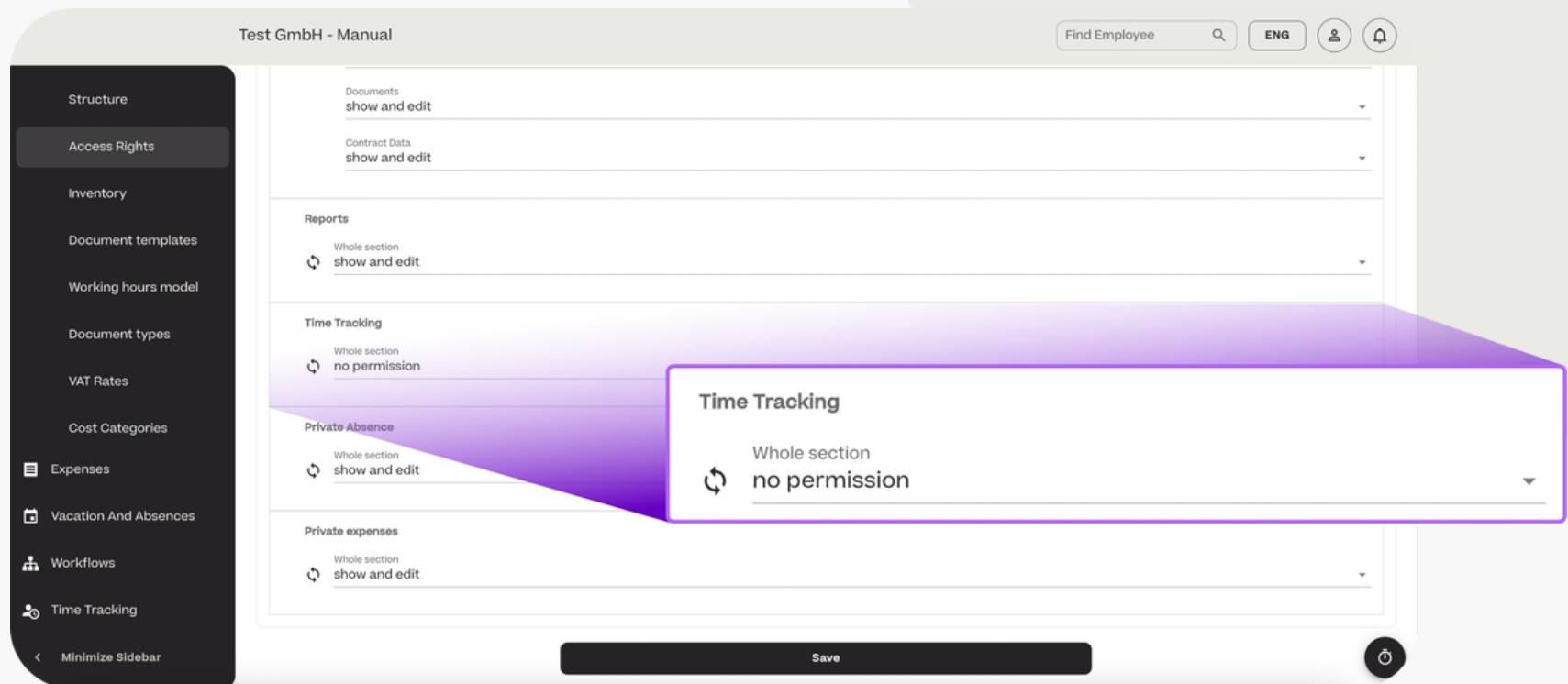
In the "Employees without time tracking" example, the employees should have access to all private employee data and functions - with the exception of time tracking. Except for the time tracking, therefore, are provided with "view and edit".



→ Company

– Rights management - Add rights profile

Since the employees in the example should not have access to the time tracking, "no permission" is granted for the time tracking area.



→ Company

– Rights management - Add rights profile

The now created and customized rights profile is displayed in the profile overview and can be selected when adding a new employee.

The screenshot shows the HCSM interface for 'Test GmbH - Manual'. The breadcrumb trail is 'COMPANY > SETTINGS > ACCESS RIGHTS > PROFILE'. The 'PROFILES' tab is selected. The table displays the following data:

TITLE	INVISIBLE	
Mitarbeiter	No	
Arbeitgeber	No	
Berater	No	
Mitarbeiter ohne Zeiterfassung	No	

The row for 'Mitarbeiter ohne Zeiterfassung' is highlighted with a purple callout box.

→ Company

– Rights management - Assign rights profile

In the "Rights Management" > "Users" area, all employees of your company are listed with their assigned access profiles. With a click on the column of an employee the access profile can be edited.

Also, by clicking on the employee, individual changes can be created to the user profile without changing the entire profile for all other employees.

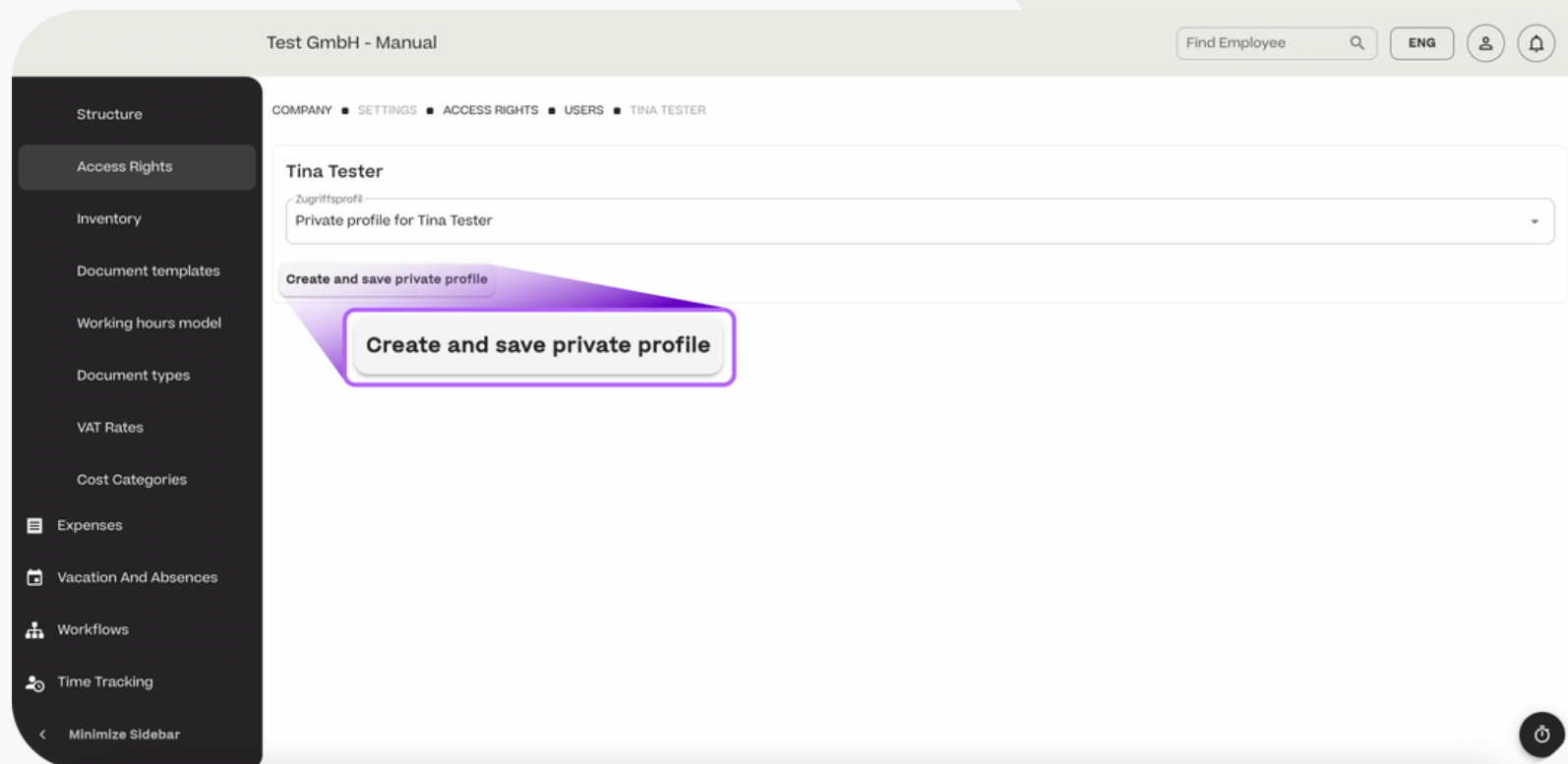
The screenshot displays the 'Users' management interface in HCSM. The top navigation bar shows 'Test GmbH - Manual' and a search bar for 'Find Employee'. The main content area has a breadcrumb trail: 'COMPANY > SETTINGS > ACCESS RIGHTS > BENUTZER'. The 'USERS' tab is highlighted. Below the tab is a search bar for 'Employees' and a 'Rows 20' dropdown. The table below lists two employees:

NUMBER	FIRST NAME	LAST NAME	ACCESS PROFILE
1	Manuel	Tester	Arbeitgeber
2	Tina	Tester	Mitarbeiter ohne Zeiterfassung

→ Company

– Rights management - Assign rights profile

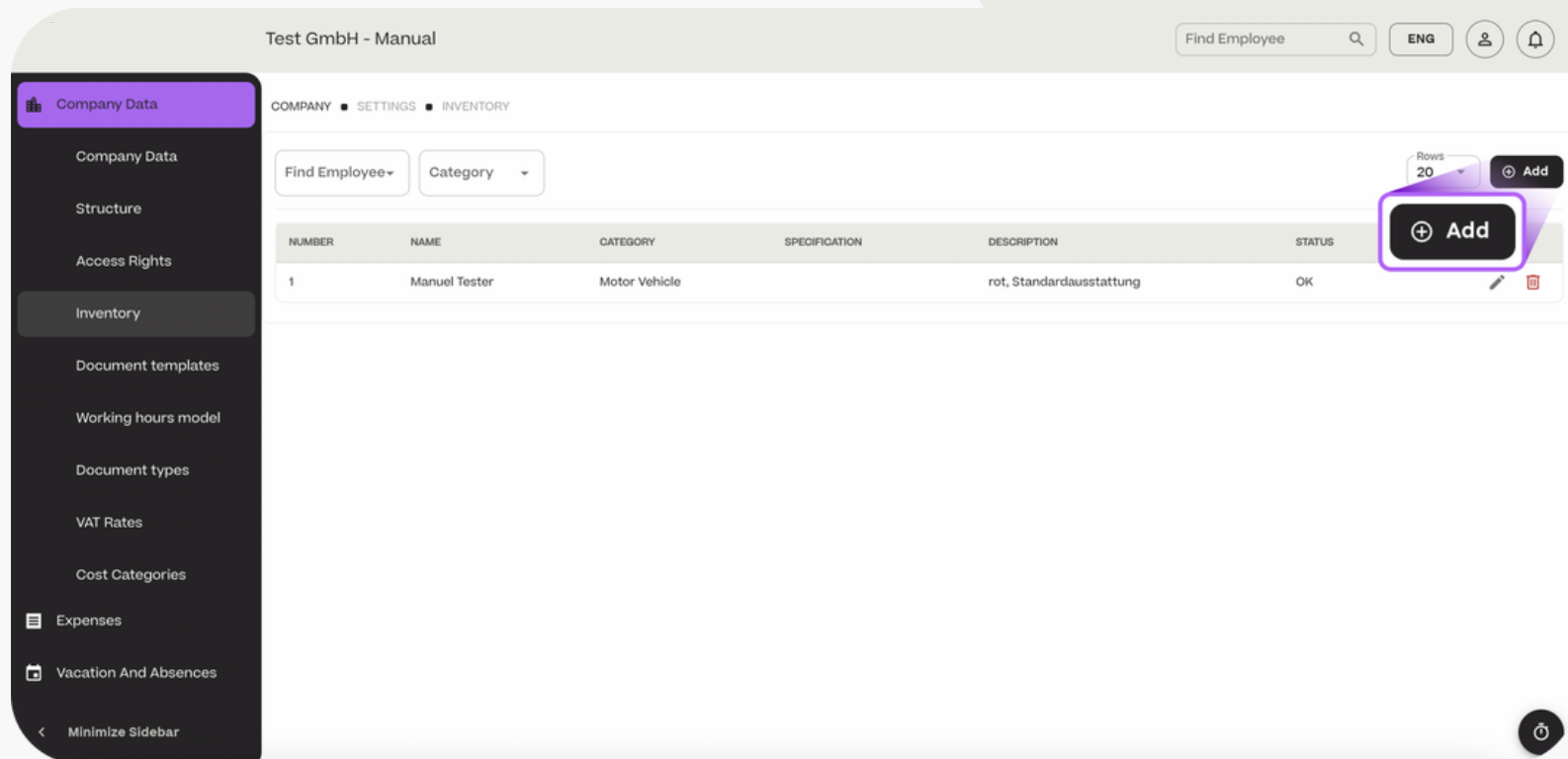
An individual rights profile can be created by clicking on "Create and save private profile". The entries made for company and private access rights only apply individually to the corresponding employee.



→ Company

– Inventory - Add inventory

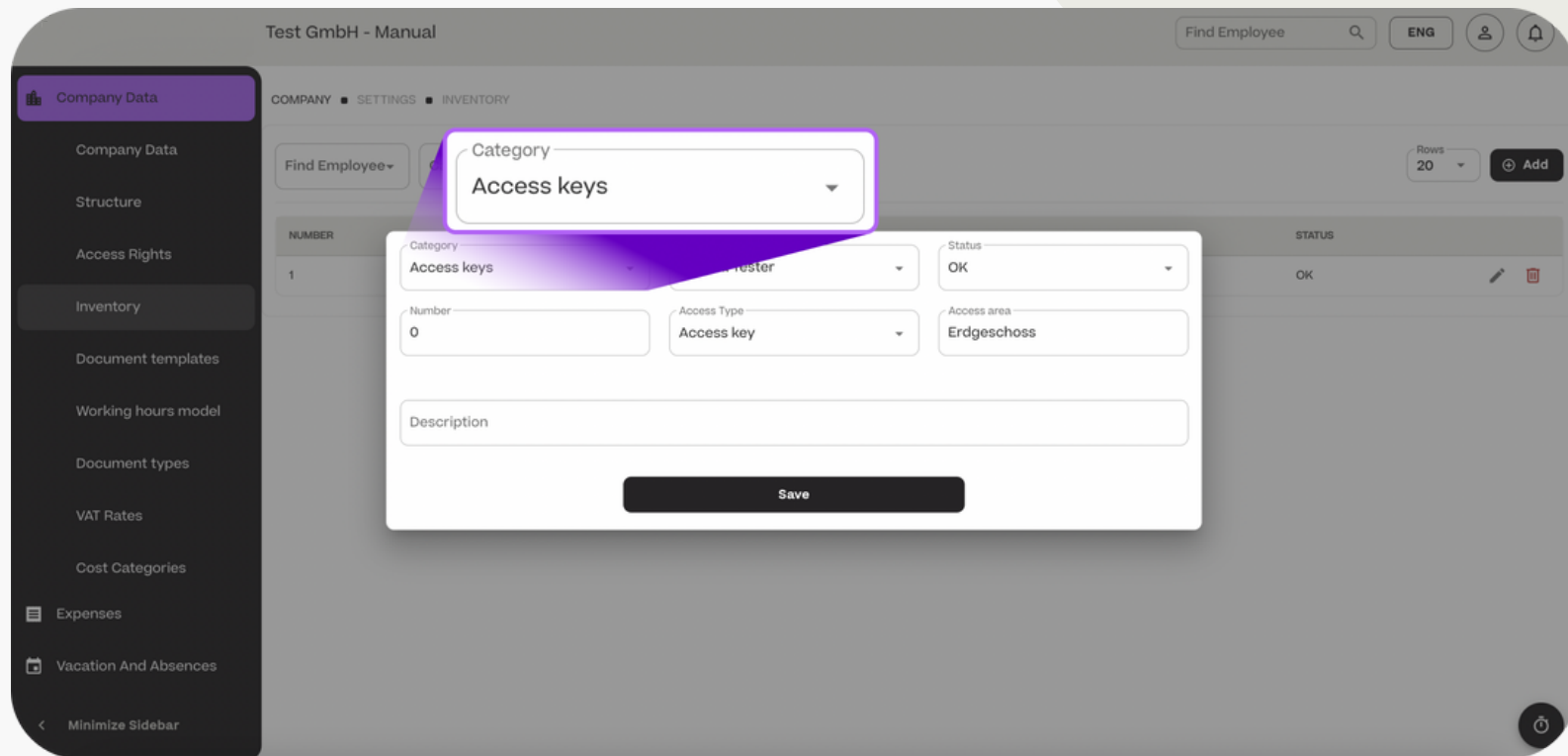
Inventory can be added in the "Company" > "Inventory" area by clicking on "+ Add" and assign it to an employee.



→ Company

– Inventory - Add inventory

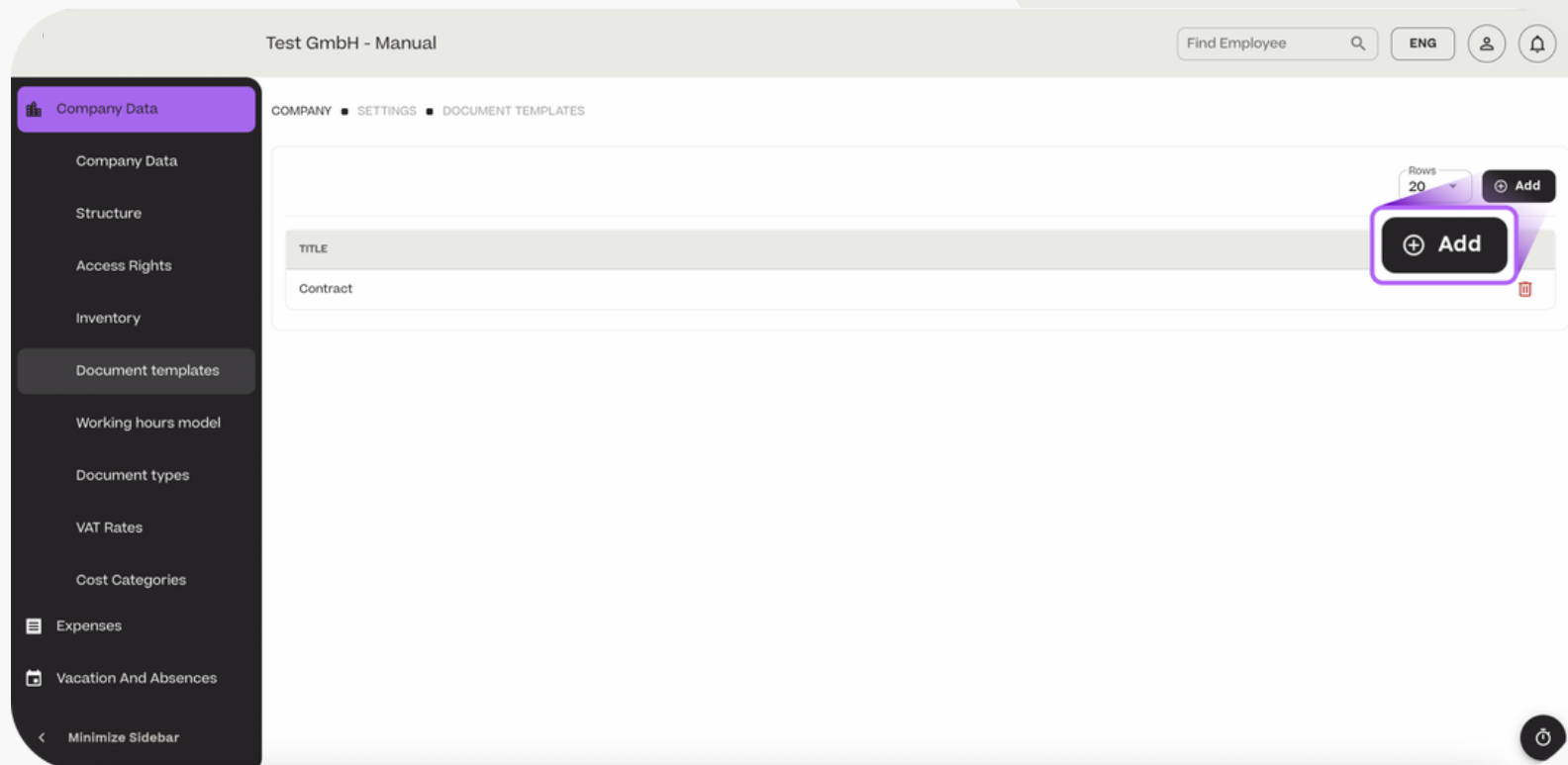
Select the category of the inventory you are creating and the employee to whom you want to assign the inventory. All other fields to be filled in depend on the category you select for the inventory you are creating. After you have made your entries, click "Save".



→ Company

– Document Template - Add Template

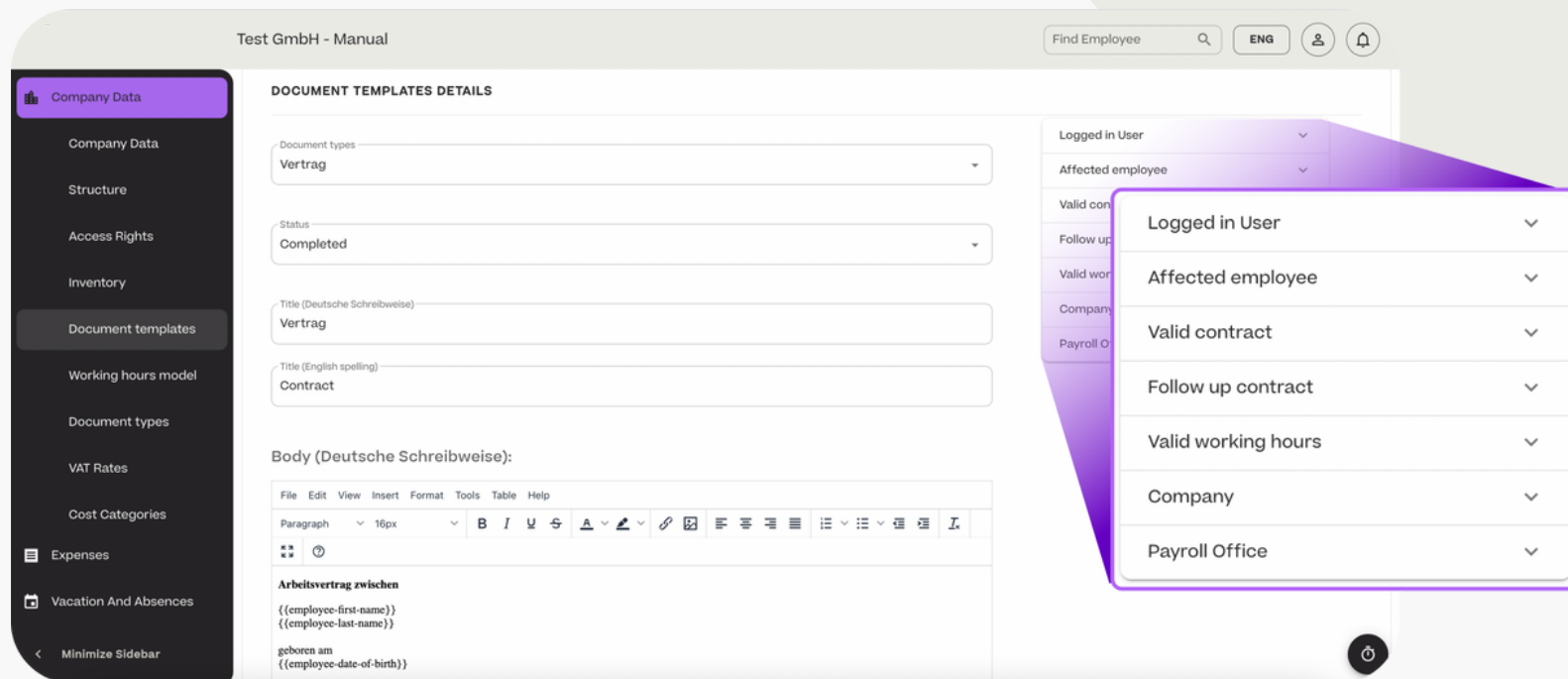
In the "Employees" > "Master data" > "Documents" area, you can use document templates to create documents automatically (e.g. contracts, see p. 18). You create the templates for this under "Company" > "Document templates" > "+ Add".



→ Company

– Document Template - Add Template

Name your document type and enter the content of your template under "Body". To insert the placeholders that will be filled in automatically, select the corresponding blocks from the right overview (e.g. `{{employee-first-name}}` = first name). With the status "Completed" you make the template finally usable.



→ Company

– Add working time models

In the employee master data area, you can select a working time model for the contract (see p. 20). In the "Company" > "Working time models" area, you can add individual models (e.g. mini-job) to the already preset models. To do this, click on "+ Add".

The screenshot shows the 'Working Hours Model' configuration page for 'Test GmbH - Manual'. The page has a sidebar on the left with various menu items, including 'Company Data', 'Structure', 'Access Rights', 'Inventory', 'Document templates', 'Working hours model' (which is highlighted), 'Document types', 'VAT Rates', 'Cost Categories', 'Expenses', and 'Vacation And Absences'. The main content area shows a table with two rows: 'Full Time (Vollzeit)' with 40.0 weekly working hours and 'Part Time (Teilzeit)' with 35.0 weekly working hours. The table has columns for 'TITLE', 'WEEKLY WORKING HOURS', and 'JOB TYPE'. There are also 'Add', 'Edit', and 'Delete' icons for each row. A purple callout box highlights the '+ Add' button in the top right corner of the table area. The page also features a 'Find Employee' search bar, 'ENG' language selector, and user profile and notification icons in the top right.

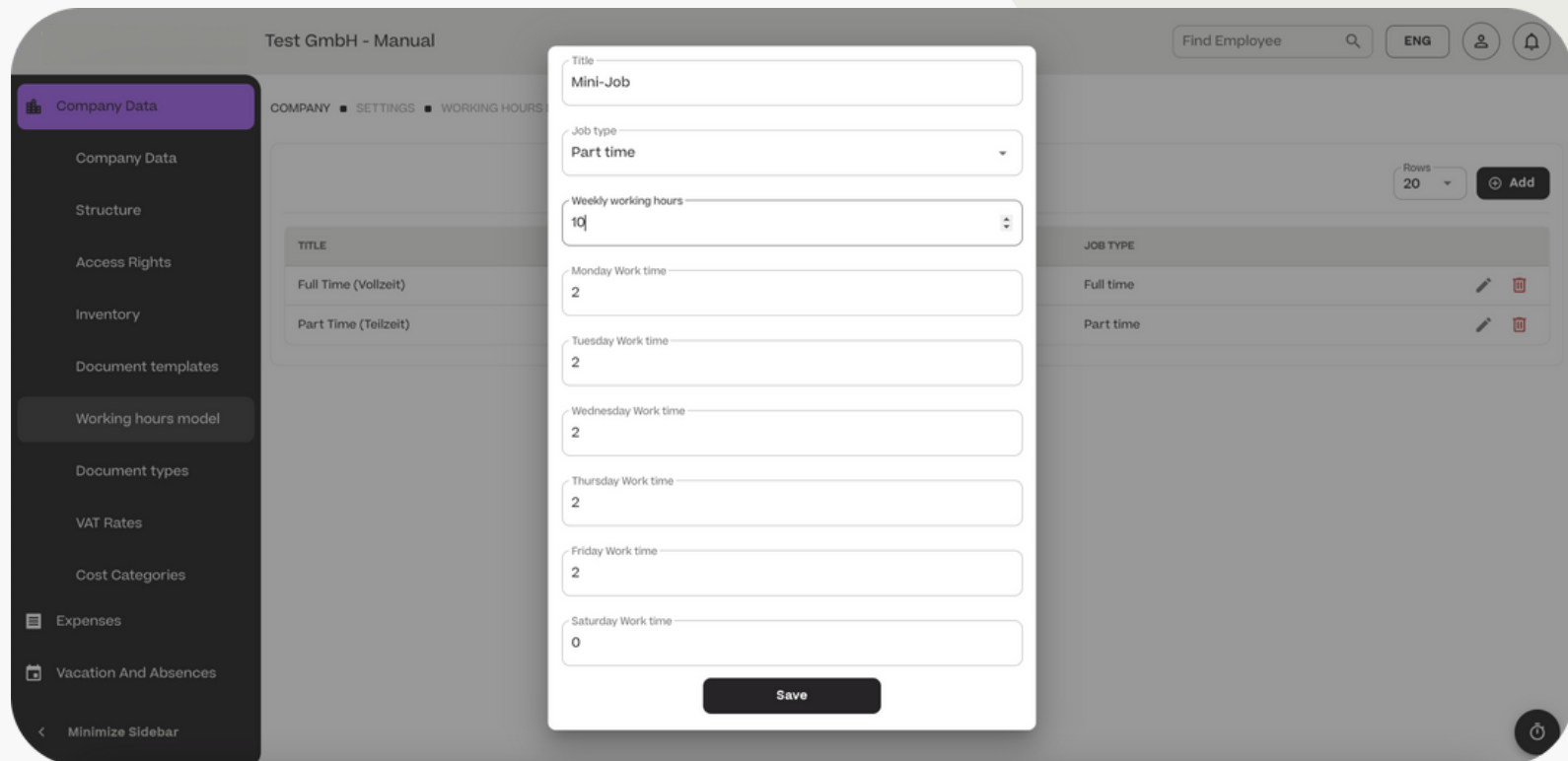
TITLE	WEEKLY WORKING HOURS	JOB TYPE
Full Time (Vollzeit)	40.0	Full time
Part Time (Teilzeit)	35.0	Part time

→ Company

– Add working time models

Name the work time model, select the job type and enter the weekly working hours that are proposed when selecting the model.

However, the times are always customizable when creating the contract.



→ Company

– Add document types

In the employee master data area, you can exchange documents with your employees and assign categories (see p. 17). In the "Company" > "Document types" area, you can add more categories to the preset ones. To do this, click on "+ Add".

Test GmbH - Manual

Find Employee ENG

COMPANY ■ SETTINGS ■ DOCUMENT TYPES

Document types

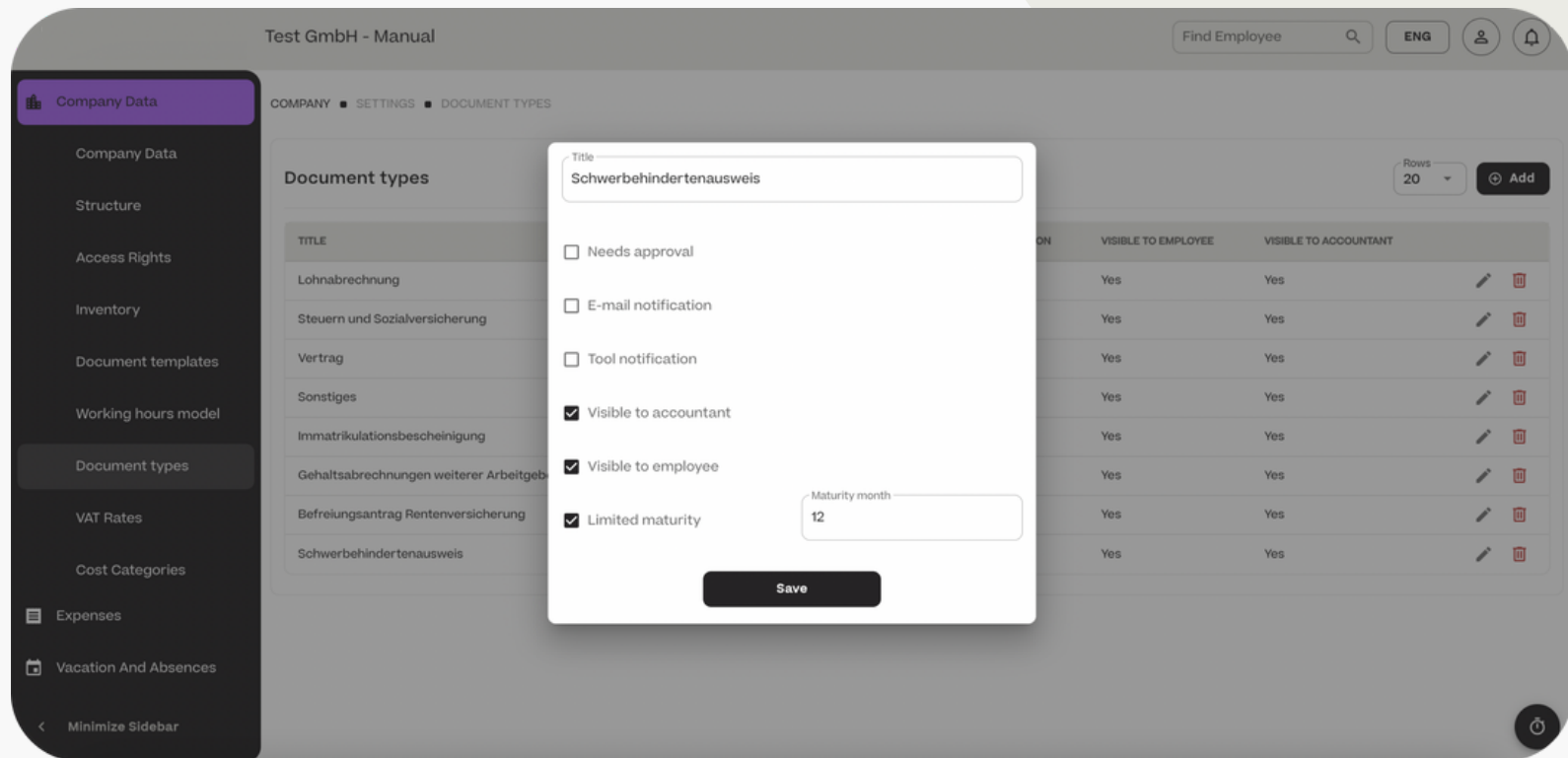
Rows 20

TITLE	NEEDS APPROVAL	TOOL NOTIFICATION	E-MAIL NOTIFICATION	VISIBLE TO EMPLOYEE	VISIBLE TO ACCOUNT		
Lohnabrechnung	No	Yes	Yes	Yes	Yes		
Steuern und Sozialversicherung	No	No	No	Yes	Yes		
Vertrag	Yes	Yes	Yes	Yes	Yes		
Sonstiges	No	No	No	Yes	Yes		
Immatrikulationsbescheinigung	No	No	No	Yes	Yes		
Gehaltsabrechnungen weiterer Arbeitgeber	No	No	No	Yes	Yes		
Befreiungsantrag Rentenversicherung	No	No	No	Yes	Yes		
Schwerbehindertenausweis	No	No	No	Yes	Yes		

→ Company

– Add document types

Specify the title of the document type and select whether the document needs to be approved, whether a notification should be triggered upon upload, for whom the document is visible and whether it has a validity.



→ Company

– Add VAT rates

When your employees upload their own receipts in the "Expenses" area, the system queries the VAT rate of the invoice. We have stored all standard VAT rates for Germany.

In the menu "VAT rates" these can be supplemented by foreign tax rates.

Test GmbH - Manual

Find Employee ENG

COMPANY ■ SETTINGS ■ VAT RATES

Rows 20 Add

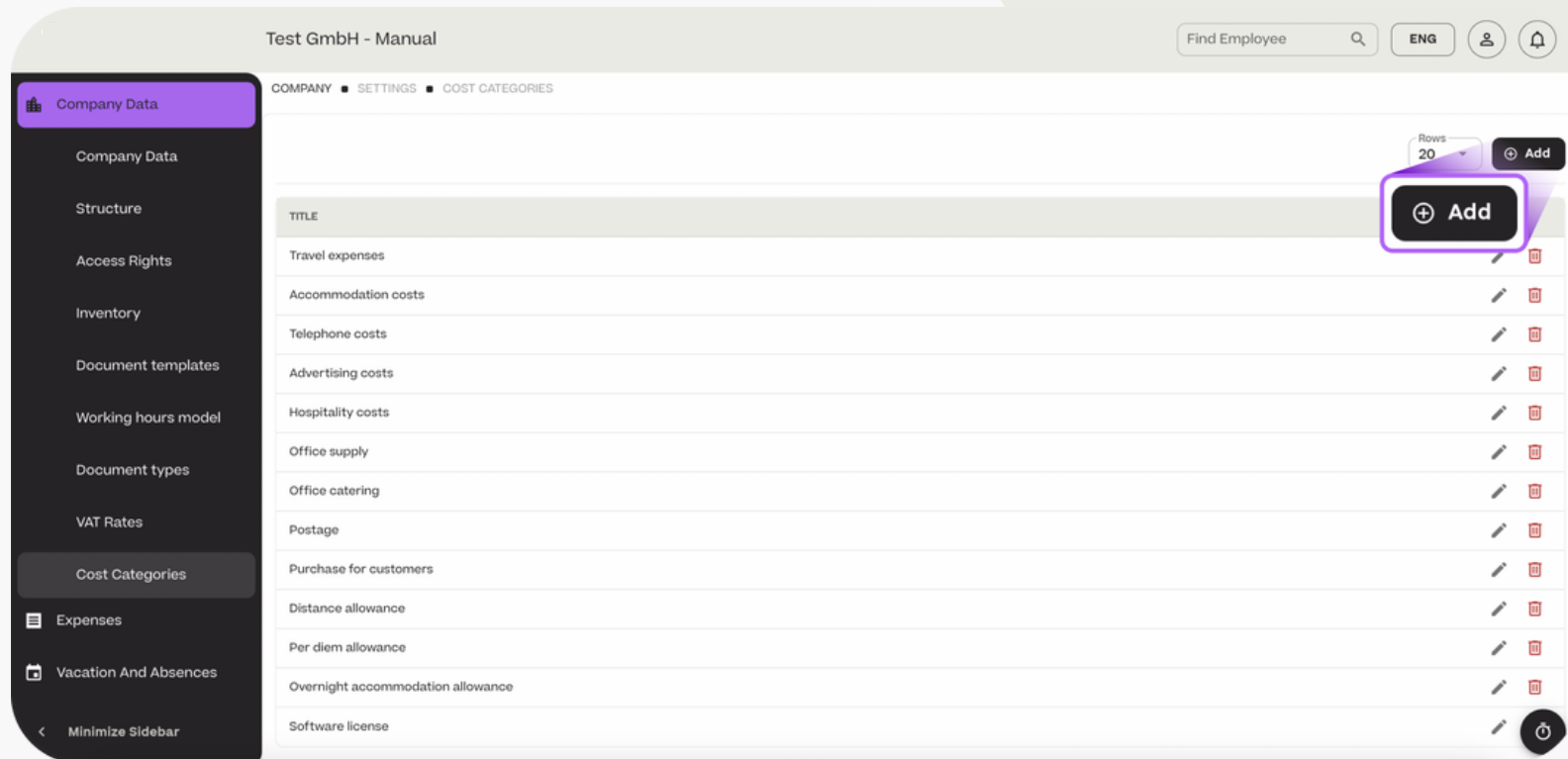
TITLE	PERCENTAGE		
19%	19.0		
7%	7.0		
13b reverse charge	19.0		
Ausländische Steuer	0.0		
Keine Steuer	0.0		

Company Data
Company Data
Structure
Access Rights
Inventory
Document templates
Working hours model
Document types
VAT Rates
Cost Categories
Expenses
Vacation And Absences
Minimize Sidebar

→ Company

– Add cost categories

In the "Expenses" area you can select which cost categories your expenses can be assigned to. Under "Cost categories" you can create these selectable categories via "+ Add".



Expenses

HCSM

→ Expenses

– Submit expenses

Under "Expenses" you can submit receipts for the reimbursement of e.g. travel expenses for your employees. Click on "Upload" to submit a receipt. PDF files are best for this.

The screenshot shows the HCSM interface for 'Test GmbH - Manual'. The sidebar on the left contains navigation options: Manuel Tester Company, Employees, Payroll, Company Data, Expenses (highlighted), Requests, Vacation And Absences, Workflows, and Time Tracking. The main content area is titled 'COMPANY EXPENSES' and has tabs for 'UNSUBMITTED RECEIPTS' and 'PROCESSED'. The 'UNSUBMITTED RECEIPTS' section includes a table with columns: REQUEST NUMBER, EMPLOYEE, INVOICE DATE, INVOICE NUMBER, and TOTAL AMOUNT. A single row is visible with the following data: 11220222234, Manuel Tester, 02/12/2022, 2, 50.0. To the right of the table are 'Submit' and 'Upload' buttons. A purple callout box highlights the 'Upload' button. Below this is the 'New requests' section, which is currently empty with the message 'No data available'. The interface also features a 'Find Employee' search bar, an 'ENG' language selector, and user profile icons at the top right.

→ Expenses

– Submit expenses

The upload can also be done independently by the employees in the private area of each employee.

The screenshot displays the 'Expenses' section of the HCSM application. The sidebar on the left shows the user 'Manuel Tester' and various navigation options, with 'Expenses' highlighted. The main content area is titled 'COMPANY EXPENSES' and features a table of 'Unsubmitted receipts'. A purple callout box highlights the 'Upload' button in the table's action column. The table has columns for 'REQUEST NUMBER', 'EMPLOYEE', 'INVOICE DATE', 'INVOICE NUMBER', and 'TOTAL AMOUNT'. Below the table, there is a 'New requests' section with a 'No data available' message.

REQUEST NUMBER	EMPLOYEE	INVOICE DATE	INVOICE NUMBER	TOTAL AMOUNT	
11220222234	Manuel Tester	02/12/2022	2	50.0	<input type="checkbox"/> <input type="button" value="Upload"/>

→ Expenses

– Submit expenses

After uploading, you can select one or more documents by checking the box and clicking "Submit".

The screenshot displays the 'Expenses' section of the HCSM application. The interface includes a sidebar with navigation options: Employees, Payroll, Company Data, Expenses (highlighted), Requests, Vacation And Absences, Workflows, and Time Tracking. The main content area is titled 'Test GmbH - Manual' and features a search bar for employees, a language selector (ENG), and a user profile icon. The 'EXPENSES' section is divided into 'UNSUBMITTED RECEIPTS' and 'NEW REQUESTS'. The 'UNSUBMITTED RECEIPTS' table has columns for REQUEST NUMBER, EMPLOYEE, INVOICE DATE, INVOICE NUMBER, and TOTAL AMOUNT. A single receipt is listed with request number 11220222234, employee Manuel Tester, invoice date 02/12/2022, invoice number 2, and total amount 50.0. The 'NEW REQUESTS' section is currently empty, displaying 'No data available'. A purple callout box highlights the 'Upload' button in the top right corner of the 'UNSUBMITTED RECEIPTS' table.

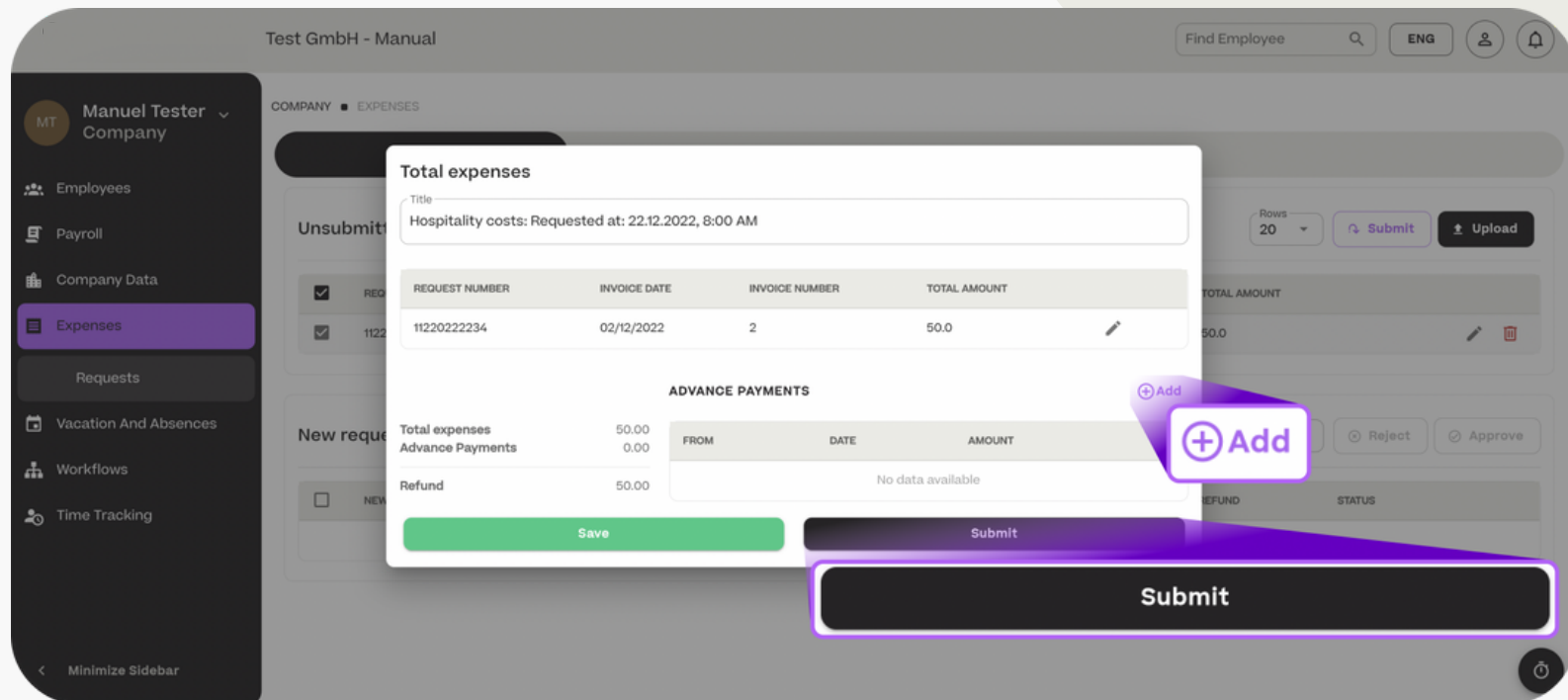
REQUEST NUMBER	EMPLOYEE	INVOICE DATE	INVOICE NUMBER	TOTAL AMOUNT	
<input type="checkbox"/>	11220222234	Manuel Tester	02/12/2022	2	50.0

NEW REQUESTS	NAME	EXPENSES	ADVANCE PAYMENTS	REFUND	STATUS
No data available					

→ Expenses

– Submit expenses

The summary of the submitted expenses will now appear in a new window. Here you can check all previously entered information, change possible errors and add advanced payments by clicking "Add". If everything is correct, click on "Submit" and the application will be sent.



→ Expenses

– Approve / reject expenses

In the "Unprocessed" area you will find all the receipts that you have uploaded for your employees or that were uploaded by your employees themselves.

Click on the red "X" to reject the request for payment of expenses. By clicking on the green "tick" you approve the disbursement. With the "pen" icon you can edit the receipt information.

The screenshot shows the HCSM interface for 'Test GmbH - Manual'. The user is 'Manuel Tester' from 'Manuel Tester Company'. The main content area is titled 'COMPANY ■ EXPENSES' and has two tabs: 'EXPENSES' and 'UNPROCESSED' (which is highlighted with a purple oval). Below the tabs, there are 'New requests' and a table with the following data:

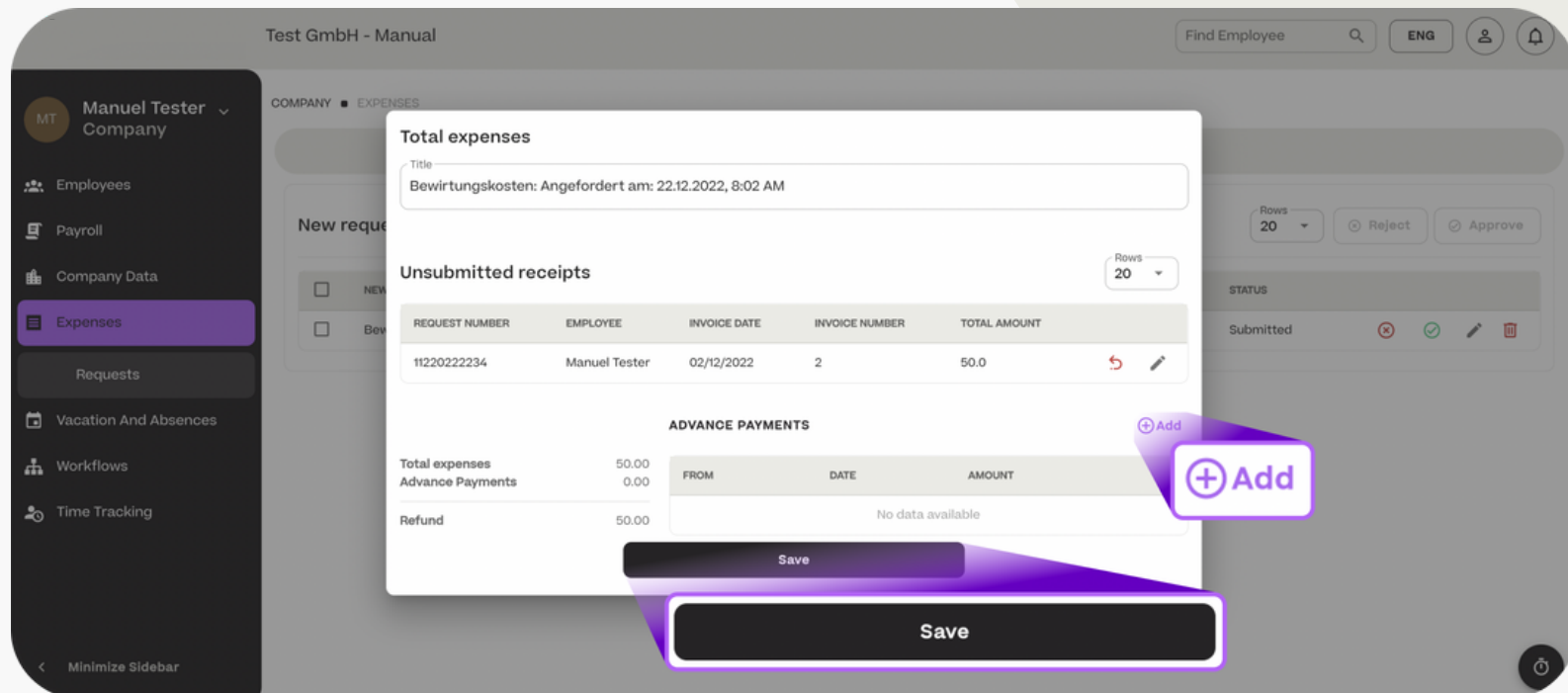
NEW REQUESTS	NAME	EXPENSES	ADVANCE PAYMENTS	REFUND	STATUS	
<input type="checkbox"/>	Reisekosten: Angefordert am: 22.12.2022, 7:56 AM	Manuel Tester	120.0	0	120.0	Submitted

Below the table, a callout box highlights four action icons: a red 'X' (reject), a green checkmark (approve), a pen (edit), and a trash can (delete). The interface also includes a sidebar with navigation options like 'Employees', 'Payroll', 'Company Data', 'Expenses', 'Requests', 'Vacation And Absences', 'Workflows', and 'Time Tracking'. At the top right, there are search and language controls.

→ Expenses

– Approve / reject expenses

By clicking on the pencil icon, a new window will appear. Here you can check all previously entered information, change possible errors and add possible advance payments by clicking on "Add" and then click "Save".



→ Expenses

– Approve / reject expenses

Submitted and approved receipts can be found in the "Processed" area. These will then later be added to the payroll of the corresponding employee.

Rejected vouchers, on the other hand, appear again in the voucher overview of the corresponding employee and must be adjusted or deleted again by the employee.

The screenshot shows the HCSM interface for 'Test GmbH - Manual'. The user is 'Manuel Tester' from 'Company'. The 'EXPENSES' section is active, with the 'PROCESSED' tab highlighted. The 'New requests' table lists three approved expense items:

<input type="checkbox"/>	NEW REQUESTS	NAME	EXPENSES	ADVANCE PAYMENTS	REFUND	STATUS	
<input type="checkbox"/>	Bewirtungskosten: Angefordert am: 21.12.2022, 8:40 AM	Manuel Tester	250.0	0	250.0	Approved	
<input type="checkbox"/>	Telefonkosten: Angefordert am: 21.12.2022, 8:56 AM	Manuel Tester	50.0	0	50.0	Approved	
<input type="checkbox"/>	Reisekosten: Angefordert am: 22.12.2022, 7:56 AM	Manuel Tester	120.0	0	120.0	Approved	

Vacation and absences

HCSM

→ Vacation and absences

– Approve / reject absences

In the "Vacation / Absence" area you have access to the absence calendars of all employees. In the calendar view you can search for specific employees and switch between months.

To approve/reject a leave in the calendar view, click the corresponding absence in the calendar.

The screenshot displays the 'Vacation and Absences' calendar for 'Test GmbH - Manual'. The interface is divided into a sidebar and a main calendar area. The sidebar on the left contains navigation options: 'Manuel Tester Company', 'Employees', 'Payroll', 'Company Data', 'Expenses', 'Vacation And Absences' (highlighted), 'Overview', 'Absence Types', 'Policies', 'Workflows', 'Time Tracking', and 'Minimize Sidebar'. The main calendar area shows a grid for 'December 2022' with columns for days of the week and rows for employees. Two employees are listed: '1 - Manuel Tester' (MT) and '2 - Tina Tester' (TT). Absences are indicated by colored blocks: a purple block for '1,0' on Dec 22 for Manuel Tester, and a blue block for '3.0 WD (5.0 D) vacation' from Dec 23 to 26 for Tina Tester. A 'New absence' button is visible in the top right of the calendar area. The interface also includes a search bar, a 'Filter' button, and a 'Public holidays' legend.

➔ Vacation and absences

— Approve / reject absences

You can now review the details of the leave request, add a comment that your employee can view, and then reject or approve the request.

The screenshot displays the HCSM interface for managing vacation and absences. The main view shows a calendar for December 2022 with a request for Manuel Tester (MT) for the date 22/12/2022. The request is currently in an 'Open' status. The interface includes a sidebar with navigation options such as 'Employees', 'Payroll', 'Company Data', 'Expenses', 'Vacation And Absences', 'Overview', 'Absence Types', 'Policies', 'Workflows', and 'Time Tracking'. The detailed view of the request shows the following information:

- Request status:** Open
- Select absence type:** vacation
- From:** 22/12/2022
- To:** 22/12/2022
- CREATED:** 22/12/2022
- Absence type statistics:**

	USED	REQUESTED	REMAIN
vacation	0.0	1.0	1.0

At the bottom of the detailed view, there are buttons for 'Reject' and 'Approve'. A purple callout box highlights the 'Send' button, which is used to add a comment to the request.

→ Vacation and absences

- Approve / reject absences

Under "Processed" you will find a list of all approved and denied leave requests.

The screenshot shows the 'Vacation and Absences' section of the HCSM system. The interface includes a sidebar with navigation options like 'Employees', 'Payroll', and 'Vacation And Absences'. The main content area has tabs for 'CALENDAR' and 'BUDGET', with 'CALENDAR' selected. Below the tabs is a search bar for 'Find Employee' and a 'Filter' button. The main data area is divided into 'UNPROCESSED' and 'PROCESSED' sections. A purple callout box highlights the 'PROCESSED' section, which contains a table of processed requests. The table has columns for 'NUMMER', 'MITARBEITER', 'ABWESENHEIT', 'PERIODE', 'ZEITPUNKT', and 'STATUS'. Two rows are visible, both with a status of 'Approved'.

NUMMER	MITARBEITER	ABWESENHEIT	PERIODE	ZEITPUNKT	STATUS
2	Tina Tester	vacation	25/12/2022 - 29/12/2022	22/12/2022 08:09:37	Approved
1	Manuel Tester	vacation	22/12/2022 - 22/12/2022	22/12/2022 08:08:13	Approved

→ Vacation and absences

– Enter absences

To create a new absence request for an employee, click on "+ New absence" or on any day in the calendar.

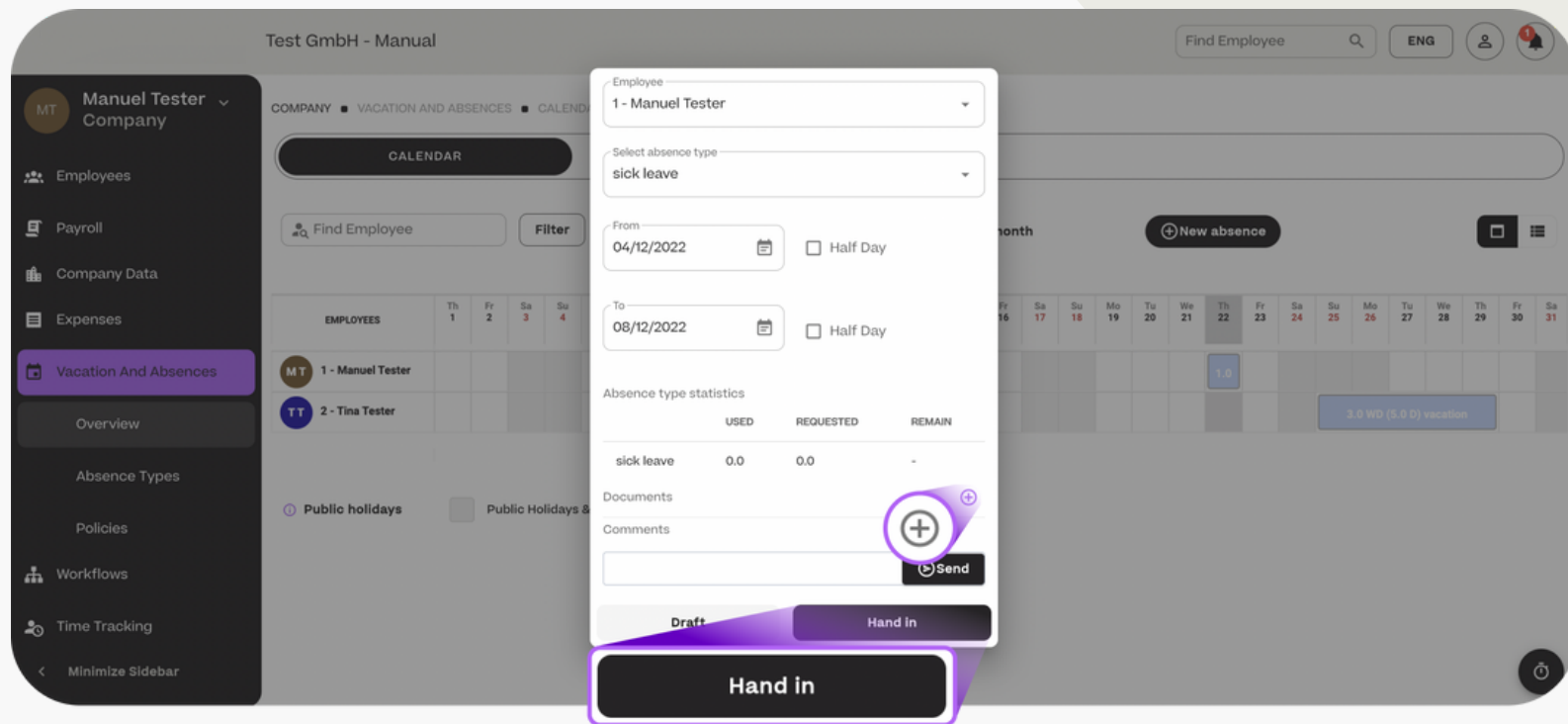
The screenshot displays the 'Vacation And Absences' module in the HCSM system. The interface includes a sidebar on the left with navigation options: Manuel Tester Company, Employees, Payroll, Company Data, Expenses, Vacation And Absences (highlighted), Overview, Absence Types, Policies, Workflows, Time Tracking, and Minimize Sidebar. The main area shows a calendar for December 2022. At the top, there are tabs for 'CALENDAR' and 'BUDGET'. Below the tabs, there is a search bar for 'Find Employee' and a 'Filter' button. The calendar grid shows two employees: '1 - Manuel Tester' and '2 - Tina Tester'. A callout box highlights the '+ New absence' button in the top right corner of the calendar area. Another callout box highlights the '+ New absence' button in the center of the calendar grid. The calendar also shows a '1.0' value for Manuel Tester on Friday, December 23rd, and a '1.0 WD (5.0 D) vacation' for Tina Tester on Saturday, December 24th. The bottom of the interface has a 'Public holidays' section with a toggle for 'Public Holidays & Weekends'.

→ Vacation and absences

– Enter absences

In the pop-up window, select the relevant employee and the type of absence and enter the start and end dates of the absence period. You can additionally upload a proof of absence via the "+" sign.

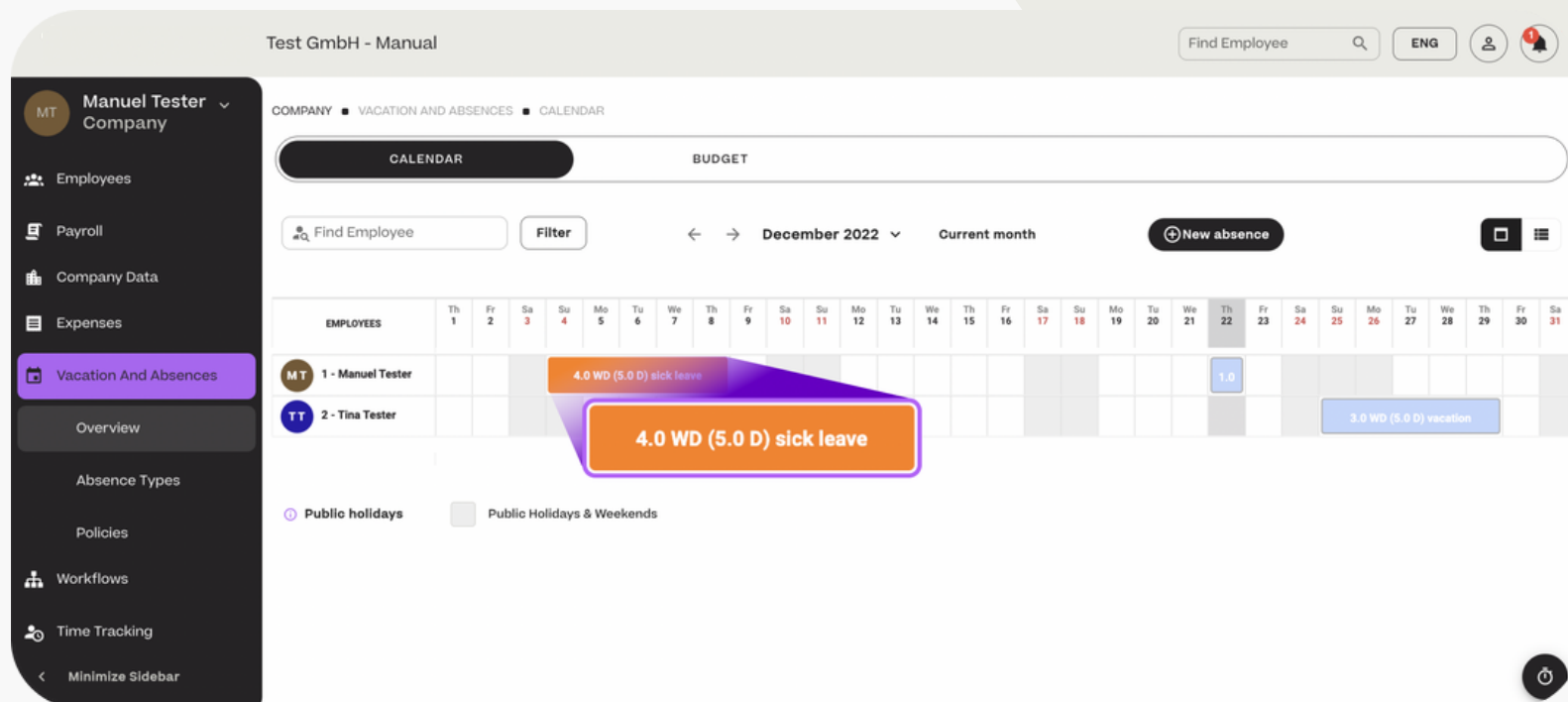
Click on "Submit" to send the request or on "Draft" to only save it for the time being.



→ Vacation and absences

– Enter absences

The absence now entered appears in the calendar and must be approved by you. This approval must be made even if you have submitted the request for absence yourself for your employee.



→ Vacation and absences

– View vacation budget

You can view the vacation budget of all your employees under "Vacation and Absences" > "Overview" > " Budget".

Test GmbH - Manual

Find Employee ENG

COMPANY ▾ VACATION AND ABSENCES ▾ BUDGETS

CALENDAR **BUDGET**

Rows 20

FULL NAME	CURRENT YEAR	PREVIOUS YEAR	TOTAL	USED	REQUESTED	EXPIRED	AVAILABLE
Manuel Tester	2.0	0.0	2.0	1.0	0.0	0	1.0
Tina Tester	20.0	0.0	20.0	3.0	0.0	0	17.0

Minimize Sidebar

→ Vacation and absences

– Add absence types

To add new absence types that your employees can select, click on "Vacation/Absence" > "Absence Types" > "+ Add".

Test GmbH - Manual

Find Employee ENG

COMPANY ■ VACATION AND ABSENCES ■ ABSENCE TYPES

Manuel Tester Company

- Employees
- Payroll
- Company Data
- Expenses
- Vacation And Absences**
- Overview
- Absence Types
- Policies
- Workflows
- Time Tracking

Minimize Sidebar

Vacation and Absence

Rows 20 Add

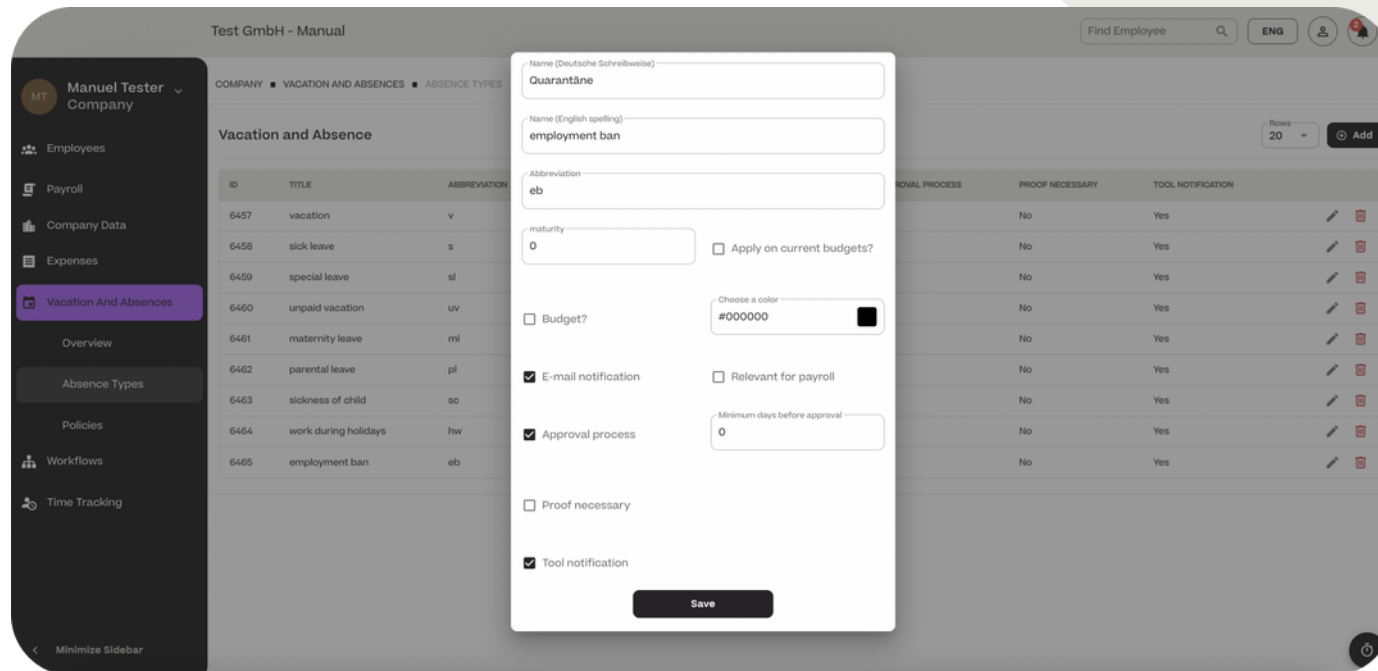
ID	TITLE	ABBREVIATION	E-MAIL NOTIFICATION	RELEVANT FOR PAYROLL	APPROVAL PROCESS	PROOF NECESSARY	TOOL NOTIFICATION	
6457	vacation	v	Yes	No	Yes	No	Yes	
6458	sick leave	s	Yes	No	Yes	No	Yes	
6459	special leave	sl	Yes	No	Yes	No	Yes	
6460	unpaid vacation	uv	Yes	No	Yes	No	Yes	
6461	maternity leave	ml	Yes	No	Yes	No	Yes	
6462	parental leave	pl	Yes	No	Yes	No	Yes	
6463	sickness of child	sc	Yes	No	Yes	No	Yes	
6464	work during holidays	hw	Yes	No	Yes	No	Yes	
6465	employment ban	eb	Yes	No	Yes	No	Yes	

→ Vacation and absences

– Add absence types

The following settings can be made per absence type:

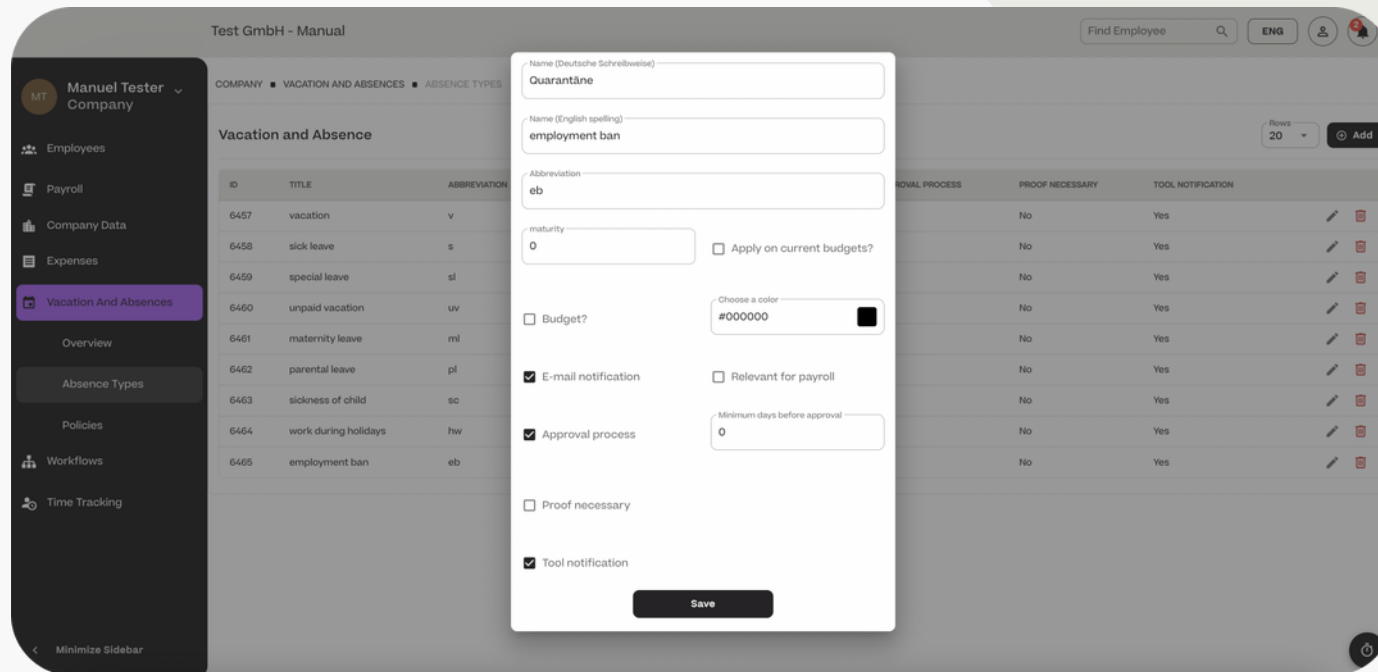
- "Name of absence": designation in the calendar view.
- "Expiration by month": Expiration of the previous year's budget.
- "Employee budget": An absence without budget can be submitted without restrictions (e.g. illness), for absences with budget an availability frame must be defined.



→ Vacation and absences

– Add absence types

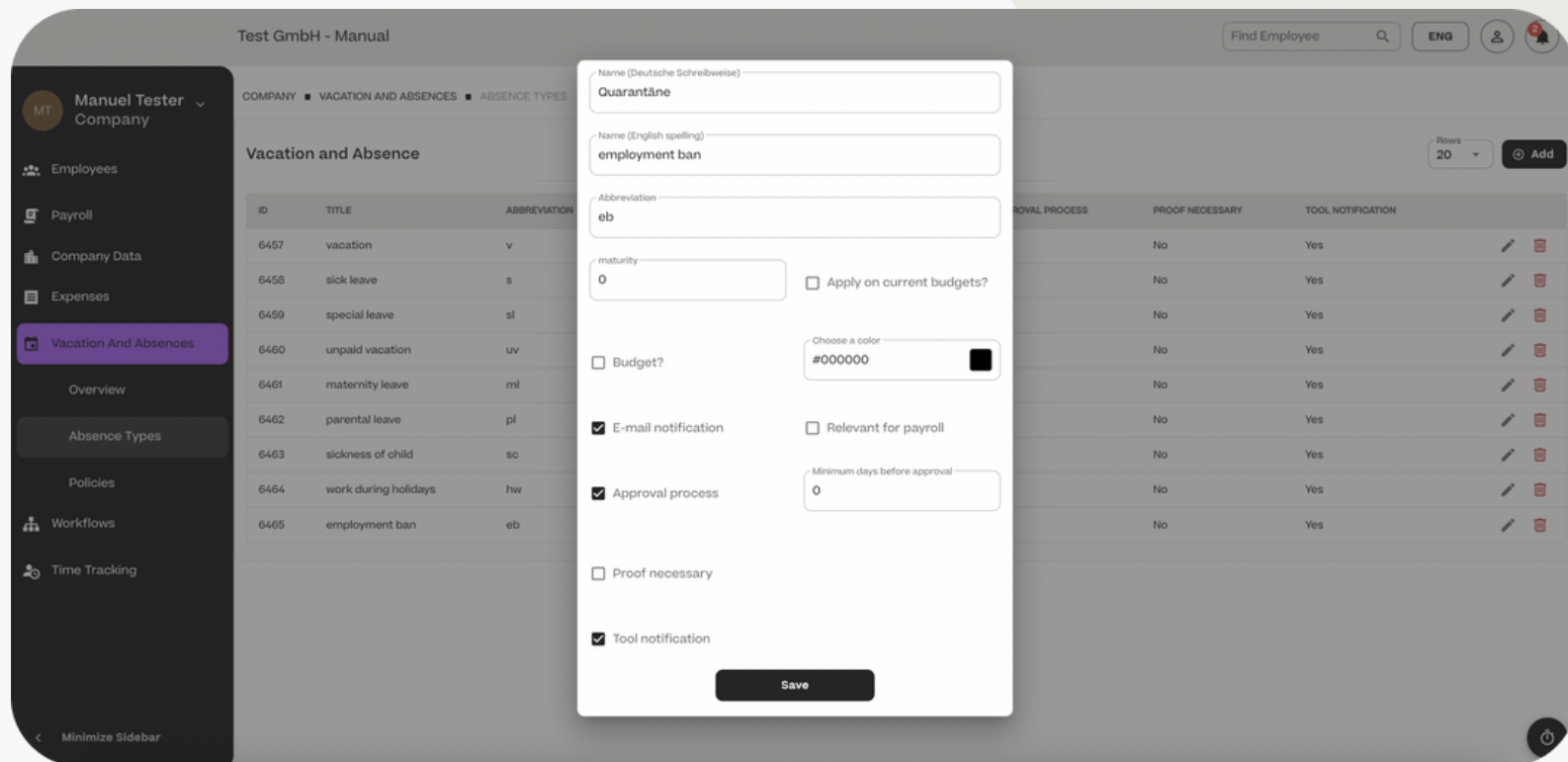
- "Email notification": With activation, an email notification will be sent when the absence type is requested.
- "Relevant for payroll": This option defines whether the absence type will be displayed to your payroll accountant.
- "Approval required": For each absence type, it is possible to define whether approval is required or whether the request is already valid upon submission.



→ Vacation and absences

– Add absence types

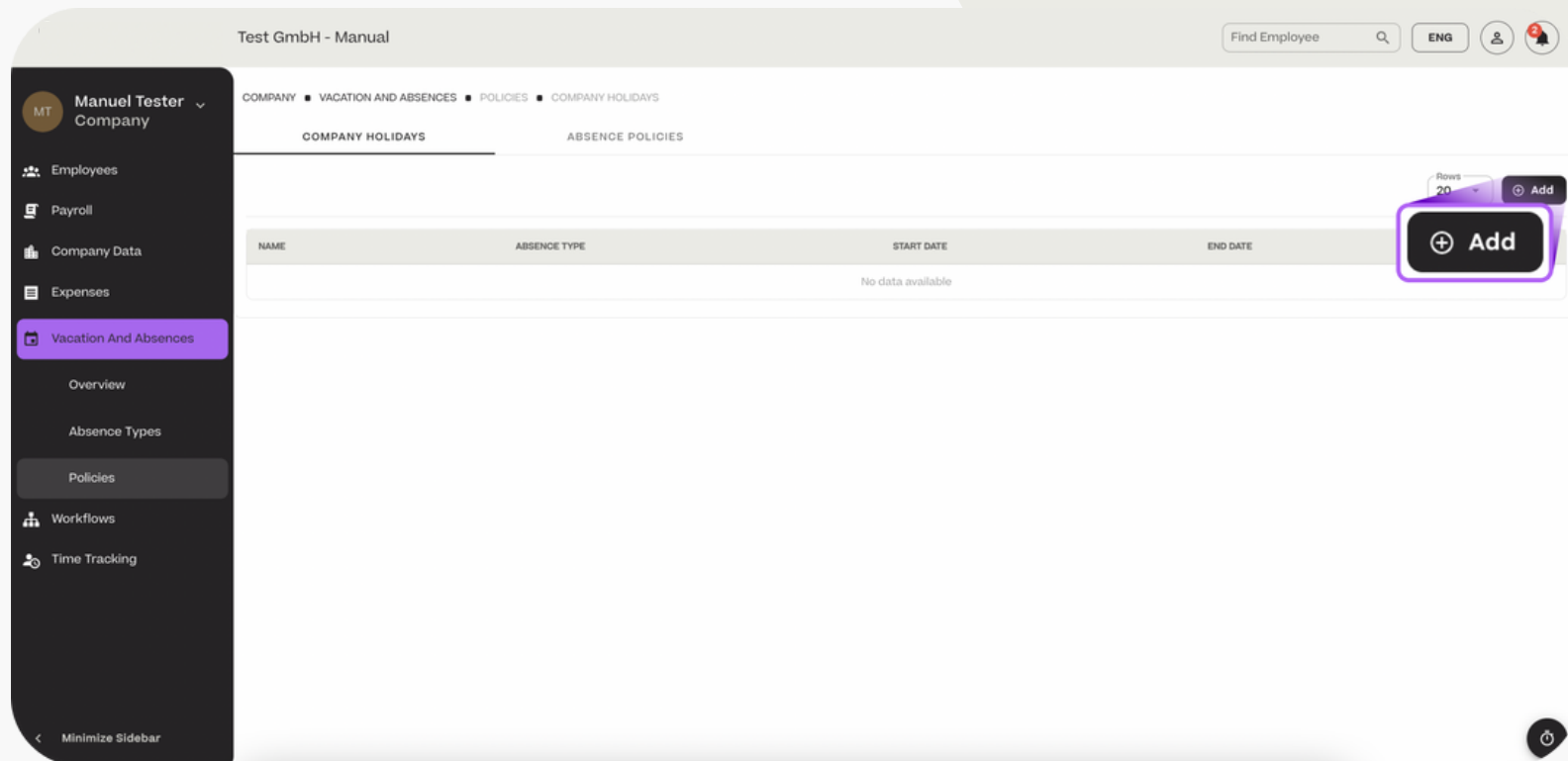
- "Proof required": With this option, your employees will be prompted to upload a proof when submitting an application.
- "Tool notification": If this option is enabled, you will receive a message in the portal about the presence of a new application.



➔ Vacation and absences

– Add company vacations

If you want to define company vacations, select "Vacation and Absences" > "Policies" and then "+ Add".



→ Vacation and absences

– Add company vacations

Then select for which employees or which departments / locations these company vacations should apply and specify the period of the vacations. Also specify whether the employees' time off within the vacations should be deducted from the vacation budget.

Test GmbH - Manual

Find Employee ENG

COMPANY ■ VACATION AND ABSENCES ■ POLICIES ■ CREATE

COMPANY HOLIDAY FORM

Name: Betriebsferien - Weihnachten

Absence type: vacation

Contract Type: Regular, Working student, Minijob, Trainee, Intern

Time period: Select range 2022-12-26 - 2022-12-30

26/12/2022	<input type="checkbox"/> Half Day	<input type="checkbox"/> No deduction from budget	27/12/2022	<input type="checkbox"/> Half Day	<input type="checkbox"/> No deduction from budget
28/12/2022	<input type="checkbox"/> Half Day	<input type="checkbox"/> No deduction from budget	29/12/2022	<input type="checkbox"/> Half Day	<input type="checkbox"/> No deduction from budget
30/12/2022	<input type="checkbox"/> Half Day	<input checked="" type="checkbox"/> No deduction from budget			

Applicable for:

Departments:

Locations: No deduction from budget

Cost units:

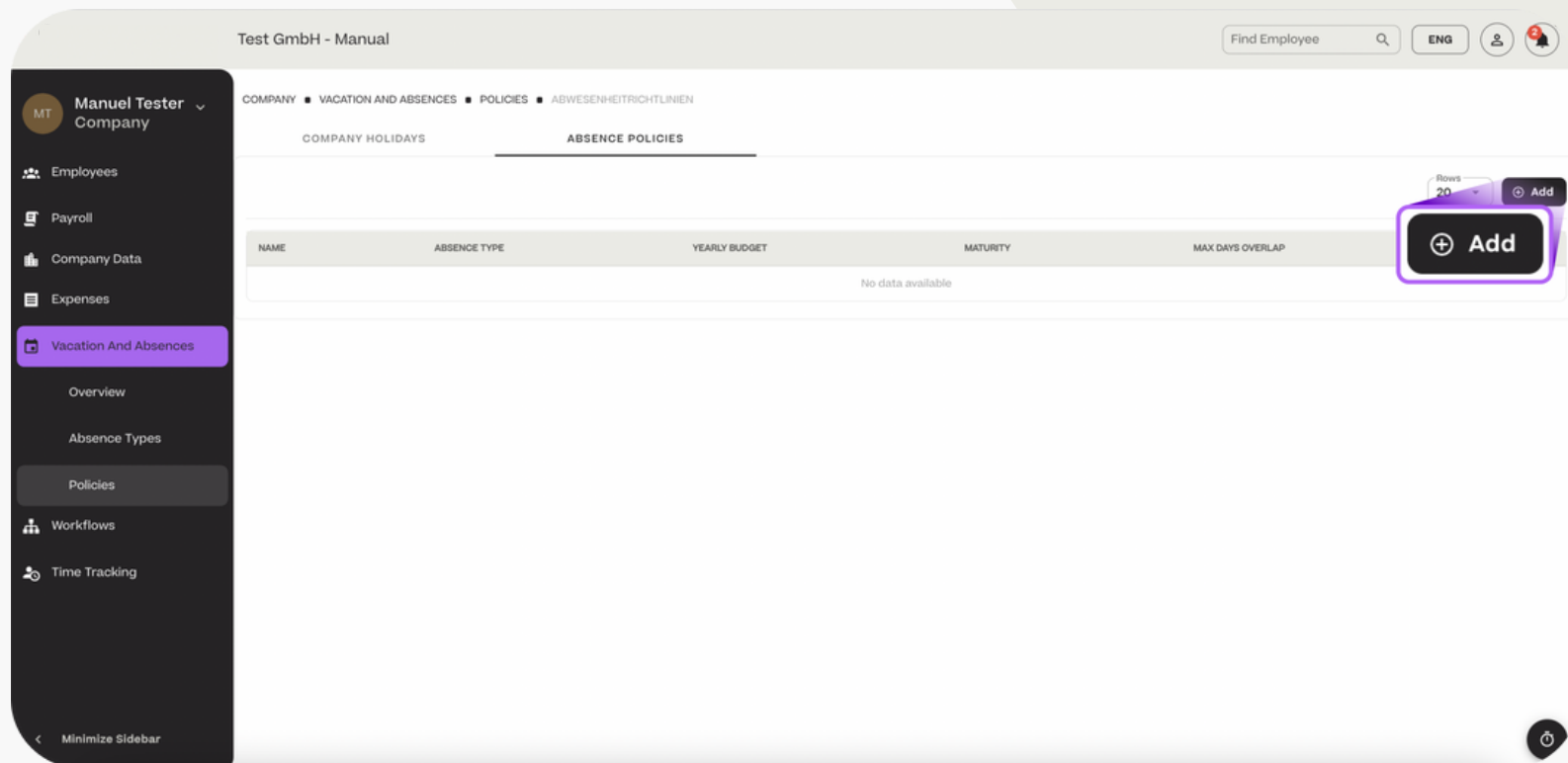
Payroll groups:

Minimize Sidebar

→ Vacation and absences

– Add absence policies

A standard vacation budget can be stored for certain employee categories. This means that when a new employee is created, he or she is directly assigned the predefined vacation budget. This can be adjusted individually afterwards.



➔ Vacation and absences

– Add absence policies

The following settings must be made for the absence policies:

- "Absence type": For which absence type should a policy be created.
- "Contract type": To which contract types does the policy apply

Test GmbH - Manual

Find Employee Q ENG

COMPANY ■ VACATION AND ABSENCES ■ POLICIES ■ ABWESENHEITRICHTLINIEN

COMPANY HOLIDAYS ABSENCE POLICIES

Rows 20 Add

MAX DAYS OVERLAP

ABSENCE POLICY FORM

Name: Test

Absence type: vacation

Contract types: Working student, Regular, Minijob, Trainee, Intern

Yearly budget: 3

Maturity: 12

Max days overlap (This field is required)

Applicable for:

Departments, Locations, Cost centers, Cost units, Payroll groups

Apply on current budgets?

Save

➔ Vacation and absences

– Add absence policies

The following settings must be made for the absence policies:

- "Annual budget": How much is the budget and after how many months does it expire in the following year.
- "Applicable to": For which company characteristics does the budget apply (e.g. departments).

Test GmbH - Manual

Find Employee Q ENG

COMPANY ■ VACATION AND ABSENCES ■ POLICIES ■ ABWESENHEITRICHTLINIEN

COMPANY HOLIDAYS ABSENCE POLICIES

Rows 20 Add

MAX DAYS OVERLAP

ABSENCE POLICY FORM

Name: Test Absence type: vacation Contract types: Working student, Regular, Minijob, Trainee, Intern

Yearly budget: 3 Maturity: 12 **Max days overlap** (This field is required)

Applicable for: Departments, Locations, Cost centers

Cost units, Payroll groups

Apply on current budgets?

Save

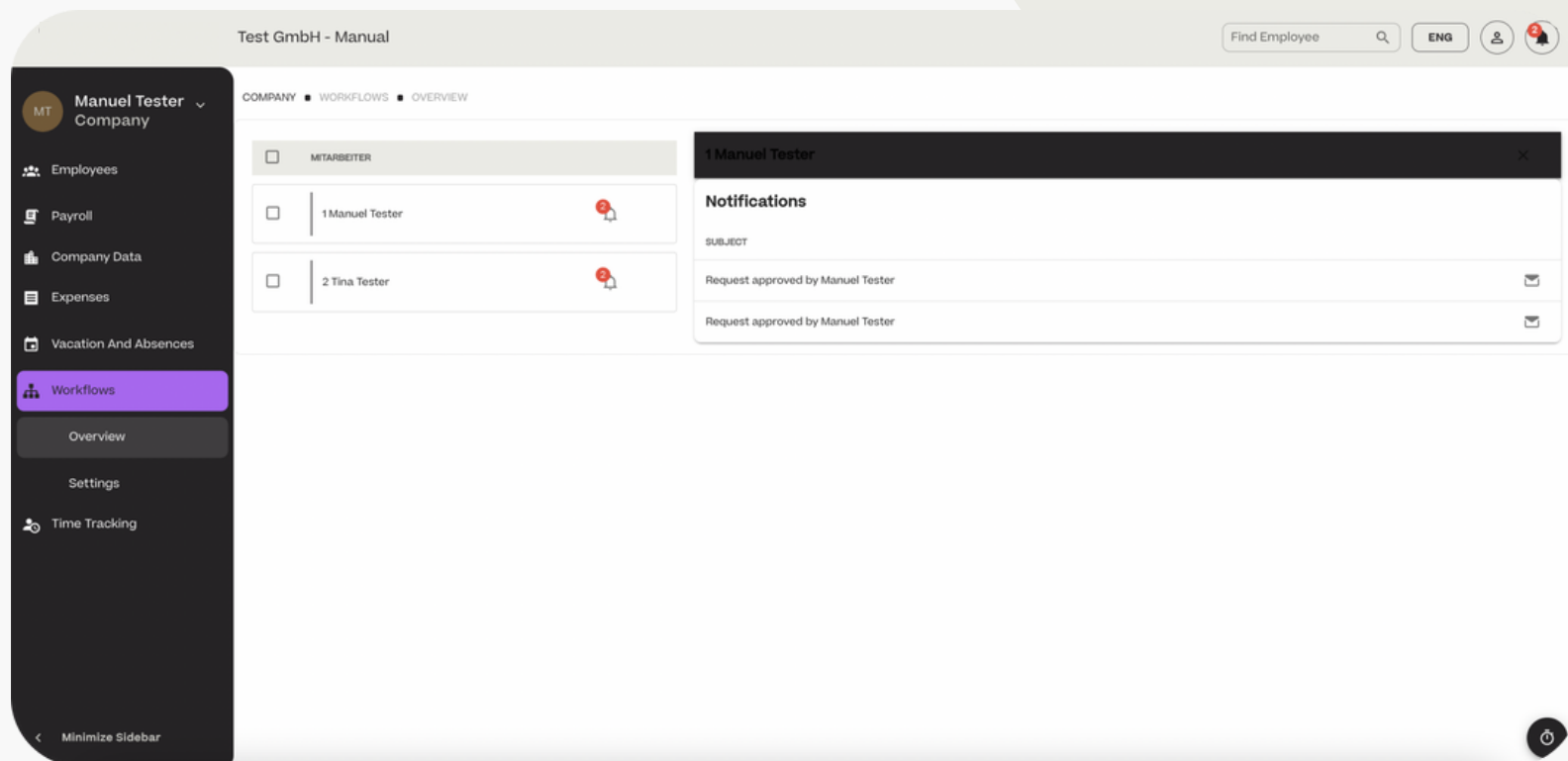
Workflows

HCSM

→ Workflows

– Notifications overview

Under "Workflows" > "Overview" you can see the current status of all workflows of your employees. You get an overview of unread notifications as well as pending approvals and tasks.

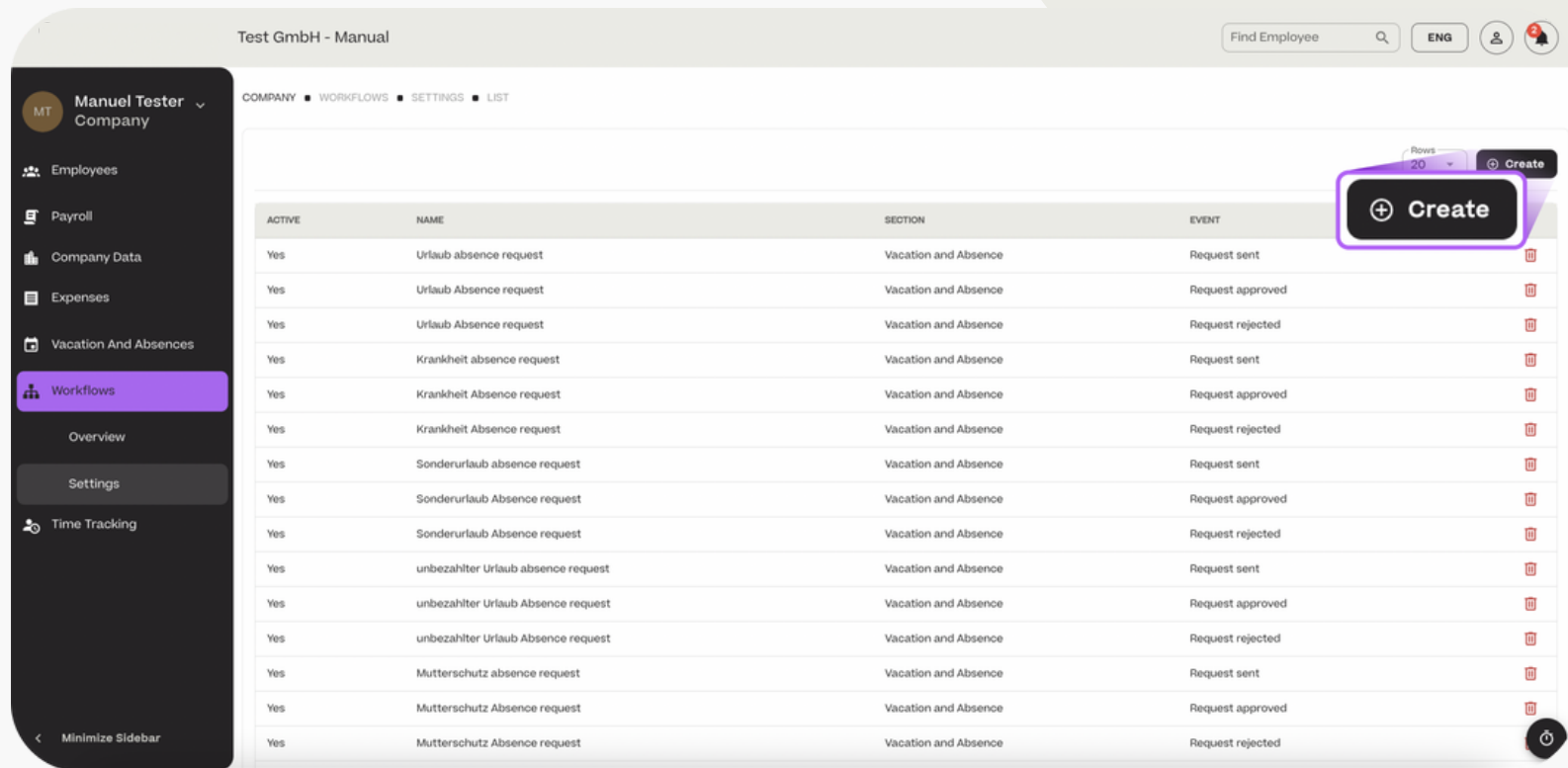


→ Workflows

– Create workflow

To create a new workflow, click "Workflows" > "Settings" > "+ Create".

The following is an example of a workflow created for onboarding a new employee.

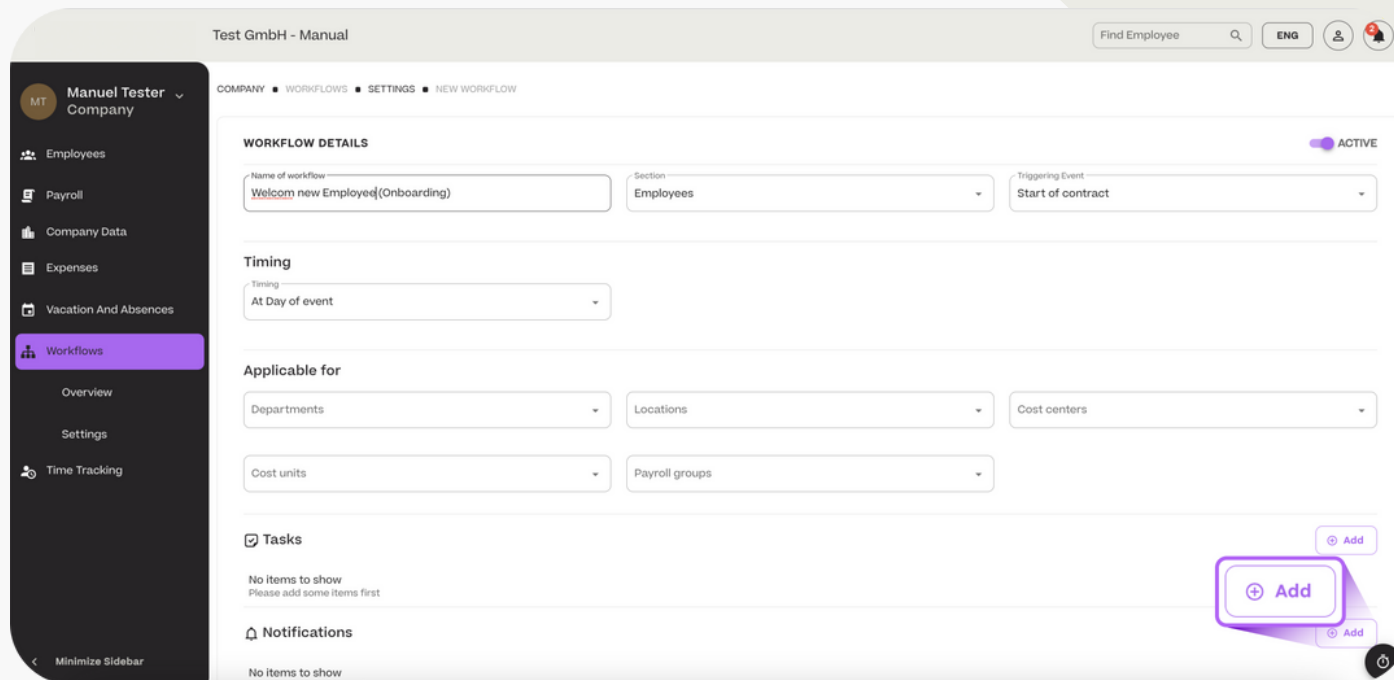


→ Workflows

– Create workflow

To create the workflow, select the triggering event, the timing and the event (task, notification or release step).

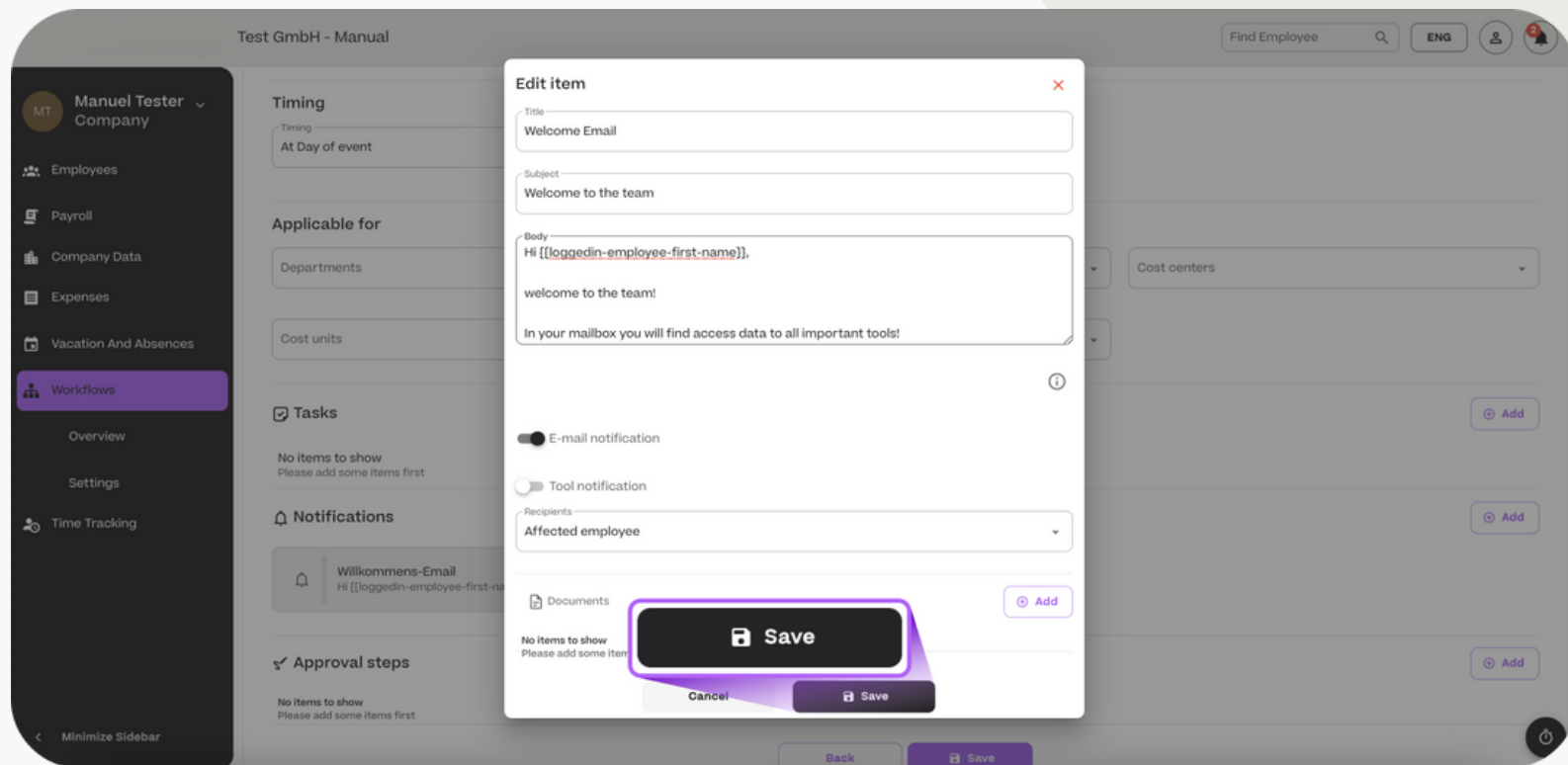
In the example, an employee is to receive a welcome email (=event = notification) on the day (=timing) of his contract start (=triggering event).



→ Workflows

– Create workflow

In the example of the welcome e-mail, now enter the content of the e-mail, select who the recipient of the e-mail should be and how the notification should be sent to him (here by e-mail). You can now also attach a document to the notification.



Time tracking

HCSM

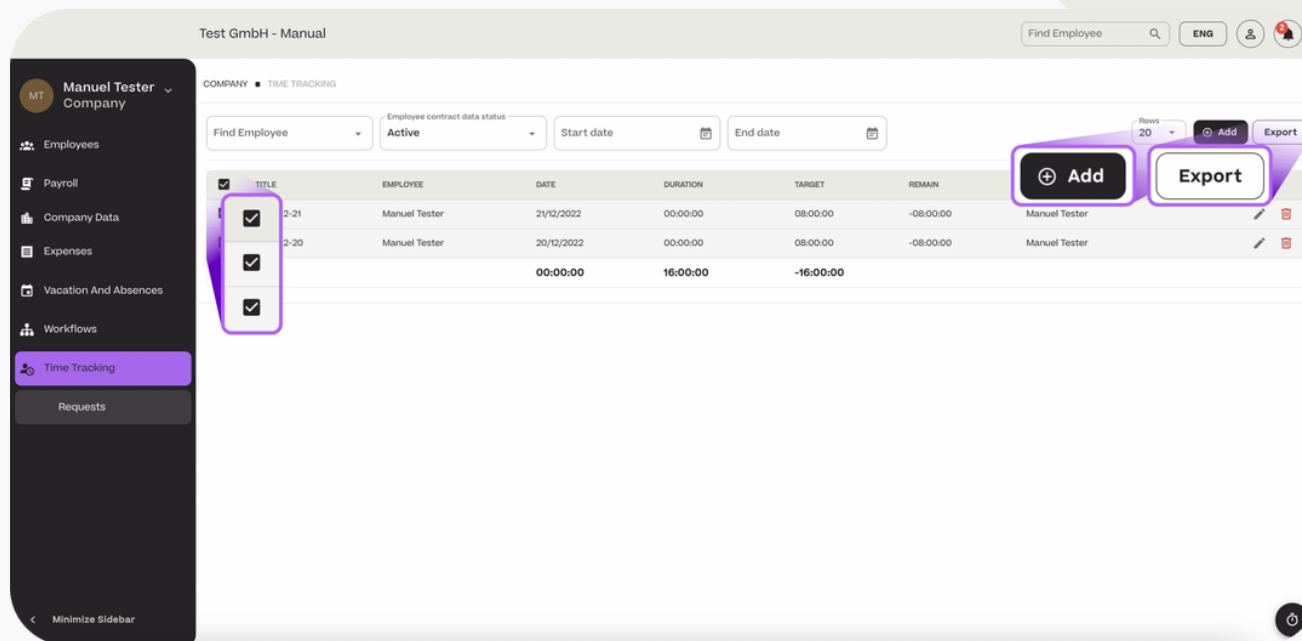
→ Time tracking

– Check and record working times

In the "Time tracking" area you can see the time tracking entries of all your employees. You can filter by individual employees or employee properties. You can also limit the time period of the displayed time tracking entries.

To export the entries, select individual items or the entire record and click Export.

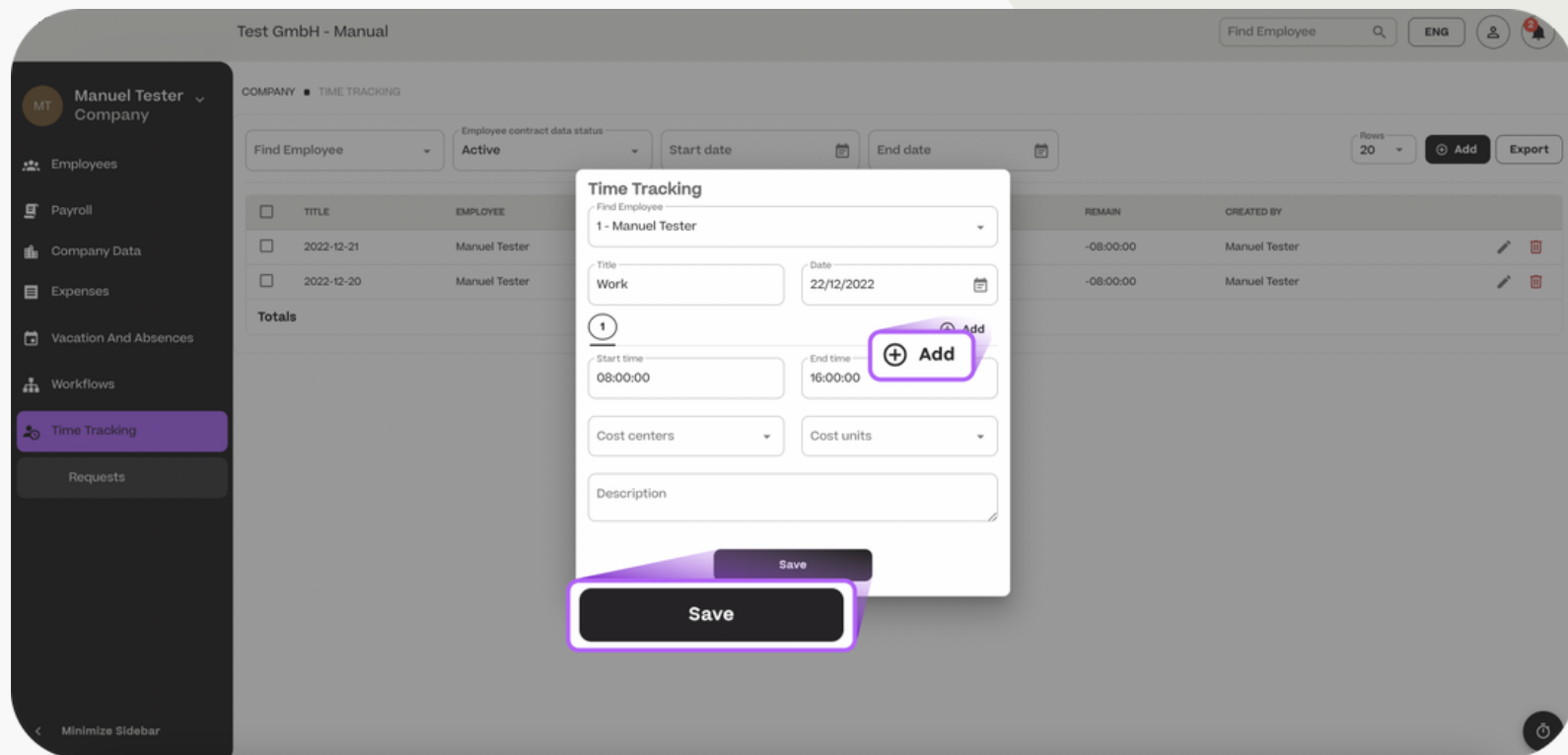
To add an entry for an employee, click "+ Add".



→ Time tracking

- Check and record working times

Now select the employee for whom you want to make the time recording entry. Also enter the date as well as the start and end time and further details if required. If you want to make multiple entries, click on "+ Add".

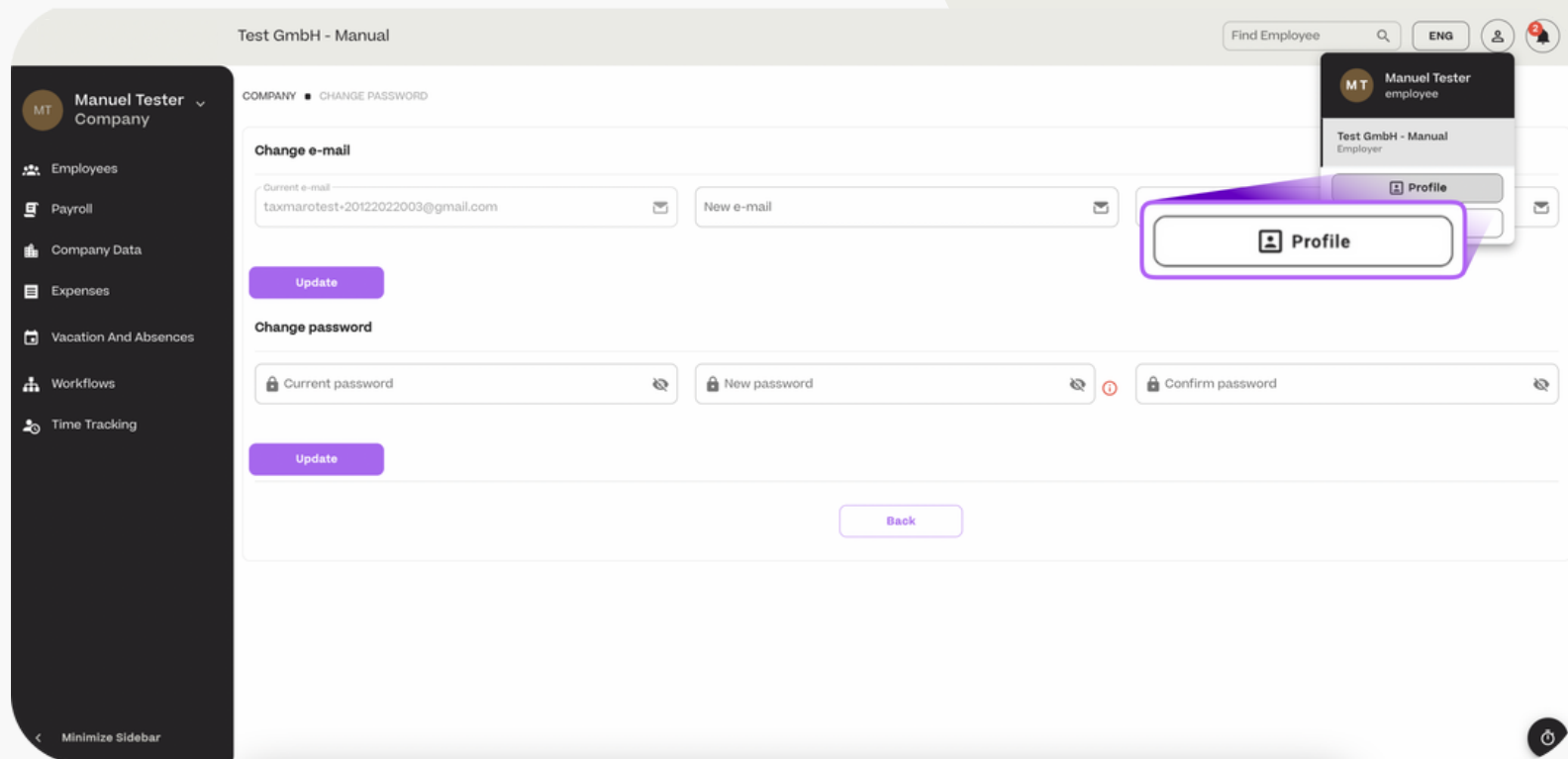


Change password and email address

HCSM

→ Change password and email address

You can change your login password and email address in the upper right corner under "Profile".



→ Reset password

If you have forgotten your password, you can reset it by entering your email address when you log in via "Forgot password". You will then receive a code for recovery.



[▶ ENG](#)

Password Recovery

E-mail

[Request password](#)

[Back](#)

→ Reset password

Enter the confirmation code in the corresponding field and choose a new password.



Password Recovery

▶ ENG

E-mail



Confirmation code

ovbTxfy1



New Password



New Password Confirmation




Continue

Back

HCSM

To visit the HR Tool follow the link below:

 <https://app.payrollhcsm.digital/>

If you have any questions, you can contact us at any time via email.

 support-payroll@hcsm.team