HR & Payroll Handbook

Run the whole people function — recruit, onboard, manage records, leave, time, competencies and performance — then run compliant per-entity payroll that posts straight to the ledger.

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Reference

HR and Payroll are two connected areas of IXL CORE that together run the people side of your business — from a job requisition and a shortlist of candidates, through onboarding a new hire and holding their record, on to leave, attendance, competencies and performance, and finally to running payroll each period and remitting the statutory returns. They sit on the same platform foundation as the rest of IXL CORE, so a closed payroll run turns into ledger entries in Accounting without anyone re-keying figures, and a signed offer becomes an employee record without re-entry.

This guide is a reference for what the two areas do and how the pieces fit together. It describes IXL CORE **version 1.0**, with statutory coverage for **Kenya (KE)** and **South Africa (ZA)**.

Overview

At a glance, HR and Payroll cover these connected areas:

- **HR Records** — the employee master (a workforce profile plus employment record), org chart and onboarding.
- **Recruitment** — requisitions, campaigns, a candidate pipeline, interviews with scorecards, and offers that convert to a provisioned employee.
- **Leave** — leave types, balances with accrual, requests and an approval queue, plus a leave calendar and liability reporting.
- **Attendance & timesheets** — recorded attendance and timesheet entries with approvals.
- **Shifts & rosters** — shift templates and roster assignments.
- **Job catalogue, competencies & KPIs** — job profiles, a competency framework and a KPI/metric library that feed performance.
- **Training & discipline** — training courses and records; disciplinary cases, actions and warnings.
- **Employee contracts** — generate from a template and send for e-signature through the platform signing engine.
- **Performance** — cycles, goals and reviews that rate against competencies and KPIs.

- **Payroll** — components, payroll profiles, calendars, statutory rate packs, pay runs, payslips and analytics — run per entity and posted to the ledger.

Everything is scoped to your organisation and its entities, and every action is governed by permissions (see Access & permissions).

HR Records

An **employee** is the master record for a person on your books. In this build the record is split into a **workforce profile** (the person and their PII) and an **employment record** (their engagement — department, designation, status and terms), so the directory and the employment terms are held cleanly rather than jammed into one row. Both are strictly gated as PII, and every read and write is checked on the request, not merely hidden in the interface.

The area also holds an **org chart** view of reporting lines, and an **onboarding** checklist so a new starter's first-day tasks are tracked to completion. Employees can be brought in through recruitment, imported in bulk, or created directly.

Recruitment

Recruitment takes a role from an approved need to a provisioned employee, without leaving the platform.

- **Requisitions** — a request to hire that is raised, then **approved or rejected** through the platform approval service, so headcount is authorised before advertising.
- **Campaigns** — a recruitment campaign is opened against an approved requisition and later **closed**; candidates apply into it.
- **Candidate pipeline** — applications move through the pipeline; you progress or **reject** each one.
- **Interviews & scorecards** — you schedule **interviews** and capture structured feedback on **interview scorecards**.
- **Offers** — you **generate an offer** for a candidate; the candidate can **accept or decline**. On **hire**, the offer is converted into an employee record and the person is provisioned into the workforce automatically, so the candidate you interviewed becomes the employee you onboard with no re-entry.

Leave

The leave area manages time off end to end. You define **leave types** (annual, sick and so on), and the system maintains a **balance** per employee per type, built up through **accrual runs**. Employees submit **leave requests**; approvers work through an **approval queue** with a leave-decision step to approve or reject them. A **leave calendar** shows who is away and when, so cover is easy to plan.

HR reporting for leave includes **leave usage**, **balances** (with export), **leave liability** and a **who's out** view — so the cost and coverage of time off are visible, not buried.

Attendance, timesheets, shifts & rosters

Attendance records capture presence, and **timesheets** record worked hours as timesheet entries submitted for approval. Alongside them, **shift templates** define recurring patterns and **roster assignments** place people onto shifts. Approved time feeds downstream so hours and overtime are accounted for correctly rather than reconciled by hand.

Job catalogue, competencies & KPIs

The **job catalogue** holds **job profiles** — versioned role definitions that carry the **competencies** and **KPIs** a role expects. The **competency framework** is a versioned library of competencies, and employees can be assessed against them through **competency assessments**. A separate **KPI / metric library** defines the measures a role is held to. Because job profiles, competencies and metrics are versioned, a change to a framework does not silently rewrite history — earlier assessments and reviews reflect the version that applied at the time.

Training & discipline

Training courses and **training records** track who has been trained on what, and expiring certifications surface in reporting. **Discipline** runs formal cases: a **disciplinary case** is opened and later **closed**, with **actions** and **warnings** recorded against it, so process is followed and evidenced.

Employee contracts

HR can author an **employment contract** from a template and **send it for e-signature** through the platform's shared signing engine — HR builds no bespoke signing or PDF machinery of its own. Only a **draft** contract can be sent; sending mints a signing request to the employee (who needs a work email), and the contract is marked **signed** on completion. A contract can be **voided**, which also voids any open signature request. The same merge-token, PDF and signing foundations are reused across the platform, so a contract carries your branded letterhead.

Performance

Performance cycles frame a review period; within a cycle, employees have **goals**, and managers complete **performance reviews** that rate against the role's **competencies** and **KPIs** carried from the job profile. A review is **finalised** (rolling the ratings up) and then **acknowledged** by the employee, so the outcome is agreed and on record rather than one-sided.

Employee self-service

Employees have a **My HR** self-service area. Through it a person can see their own record and requests, and view **their own payslips** without seeing anyone else's — the sensitive split is built into the permission model, not left to the interface.

Payroll

Payroll is run **per company entity**, so a group with several legal entities runs each on its own terms. A **pay run** is created for a period and moves through a controlled lifecycle — **draft !’ input !’ calculated !’ in review !’ approved !’ closed**, with **reject** back for correction. Maker, checker and payer are captured separately (prepared, approved and released), and a **void** on a closed run is a two-step request-and-confirm control. At calculation the run **freezes a snapshot**, so a closed run reproduces identical figures forever.

Payroll is configured from a set of masters:

- **Payroll components** — the versioned catalogue of earnings, deductions, benefits and statutory items that make up a payslip. Components are the platform master Payroll stewards.
- **Payroll profiles** — how a given employee is paid (their components and terms).
- **Calendars** — the pay periods for an entity.
- **Statutory rate packs** — the rate tables the country packs read (see below).
- **Policy & GL mapping** — a per-entity payroll policy plus the ledger accounts a run posts to.

Beyond the run itself, payroll supports **variable inputs** (period-specific additions and deductions, including a **thirteenth-month** generation), **loan schedules** for recovering advances or staff loans over time, a run **cockpit** for reviewing a run, **payslip** generation and download (also available to employees through self-service), a **posting** step that raises the payroll journal to the ledger through the shared posting engine, and payroll **analytics**.

Typical steps

1. Set up **components**, **profiles**, a **calendar**, the **statutory** rate pack and the **policy/GL mapping** for the entity once.
2. Go to **Payroll !’ Pay Runs** and create a run for the entity and period; capture any **variable inputs**.
3. **Calculate** the run and review it in the **cockpit**.
4. **Submit** for review, then **approve**; **close** the run and **post** it to the ledger.
5. Generate **payslips**; employees see theirs in self-service.

Statutory

Statutory calculation is country-driven through pluggable **rate packs**, so adding a country is a pack — there is no `if(country)` branching in the engine. This build ships packs for two countries:

- **Kenya (KE)** — PAYE, NSSF, SHIF and the Housing Levy.

- **South Africa (ZA)** — PAYE, UIF and SDL.

Rate packs are held as data: the system validates the **shape** of each rate table at write time (for example, a PAYE table must carry bands, an NSSF table its tiers), so a malformed pack is a clean, rejected update rather than silently-zero tax downstream. The **values** themselves are owned by a specialist and remain provisional pending sign-off — this documentation quotes no statutory rate. A **statutory estimate** helps model deductions ahead of a run.

Access & permissions {#access-and-permissions}

Every HR and payroll action is governed by a capability — viewing staff, managing salary, approving leave, running payroll, approving or voiding a run, and generating reports are each separate permissions, gated by both the WS04 access model and the WS12 commercial entitlement for the area. Capabilities are grouped into roles, and roles are assigned to users, so each person sees and does only what their role allows. Sensitive splits are built in — an employee can view **their own** payslips through self-service without seeing anyone else's — and operator god-mode still passes through the same gate. Every rule is enforced on each request, not merely hidden in the interface.

How HR & Payroll connect

HR and Payroll are not islands. On the shared platform foundation:

- **A new hire flows through once** — an accepted offer is **hired** into an employee record and provisioned into the workforce, slotted into a department and designation, ready for leave and payroll without being re-created anywhere.
- **Contracts, signing and documents are shared** — employment contracts reuse the platform's signing engine, PDF rendering and branded letterhead rather than a bespoke HR copy.
- **Time and leave feed pay** — approved timesheets and leave are already accounted for by the time you run payroll.
- **Payroll posts to Accounting** — a run is posted through the shared posting engine against the entity's GL mapping, so wages, deductions and employer costs land in the ledger with no separate entry.

That connection is the point: you hire and manage a person once, and the rest of the business — the org chart, their leave and time, their competencies and performance, their pay and the books — stays in step.

How-to guides

Raise a hiring requisition

Open a requisition for approved headcount, route it for approval and get the go-ahead to start recruiting.

A requisition is the formal request to hire. It captures what the role is, how many people you need and why, then goes through approval before recruitment can begin.

Before you start

- You need permission to manage HR recruitment for the scope you are hiring into.
- Decide the organisational scope of the role — a requisition is scoped to your Organisation, an Entity, a Branch, a Department or a Position.
- If you run structured job profiles, know which profile the role maps to; its competencies and interview guide flow into recruitment.

Steps

1. Go to **HR !’ Recruitment !’ Requisitions** and start a new requisition.
2. Enter the **Title** (required). This is the role you are opening.
3. Set the **Scope level** (required — Organisation, Entity, Branch, Department or Position). Fill in the matching **Entity**, **Branch**, **Department** or **Position** as the chosen level requires; each must sit within the one above it.
4. Optionally link a **Job profile**, choose an **Employment type** (permanent, fixed term, casual, seasonal, probation, intern or contractor), set the **Headcount** (1–1000) and add a **Justification** (up to 1000 characters).
5. Optionally name the **Hiring manager** (an existing employee in your organisation). You may also attach **Document references** and **Readiness metadata**.

[Screenshot: the requisition form with scope and job profile]

6. Save, then **Submit** the requisition for approval.
7. The routed approver opens it and records an **Approve** or **Reject** decision, each with an optional **Decision note** (up to 500 characters).

[Screenshot: the approval decision panel]

Result

Once approved, the requisition is cleared to recruit against. The status is managed by the platform through submit and approval — you never set it directly. A rejected requisition can be revised and resubmitted.

Related

- Recruit: campaign to hire
- Set up job profiles, competencies and KPIs
- HR & Payroll reference

Recruit: campaign to hire

Run a recruitment campaign, track candidates through interviews and scorecards, and convert an accepted offer into a new employee.

This guide walks the recruitment pipeline end to end — from opening a campaign, through candidates, interviews and scorecards, to making an offer and hiring.

Before you start

- You need permission to manage HR recruitment for the campaign's scope.
- Résumés and any documents are stored as platform references only — never file content is uploaded here.
- Candidate, interview, scorecard and offer records inherit their scope from the campaign, so you set scope only once.

Steps

Open a campaign

1. Go to **HR !’ Recruitment !’ Campaigns** and create a campaign. Enter the **Title** (required) and set the **Scope level** with its matching hierarchy fields. Optionally add a **Description** (up to 2000 characters), a **Location**, an **Opens on** date and a **Closes on** date (which cannot fall before the open date).

[Screenshot: a recruitment campaign with dates]

Add candidates

2. Add a candidate with their **Full name** (required). Optionally record **Email**, **Phone**, **Source** (referral, job board, internal, agency, direct or other), a **Résumé reference**, **Notes** and a **Rating** (1–5). Move candidates through stages using the pipeline's move, reject and withdraw actions — you do not set the stage on the form.

Schedule interviews and record scorecards

3. Schedule an interview: pick a **Kind** (phone, technical, panel or final — required), and optionally a **Scheduled at** time, an **Interviewer** (an employee), a **Location**, a **Mode** and an **Outcome**.
4. Record a scorecard: choose a **Recommendation** (strong yes, yes, no or strong no — required), add **Comments**, an **Interviewer** name or employee, a list of **Criteria** (each a criterion with a score of 0–10) and optional **Competency scores** (level 1–5 against the role's competencies).

[Screenshot: an interview scorecard with competency scores]

Offer and hire

5. Create an offer: optionally set **Employment type**, **Job grade**, **Proposed start date**, **Expiry date** and **Salary context** (reference metadata only — no pay amounts or payslip data). Then **Send**, and record **Accept**, **Decline** or **Withdraw**.
6. Once an offer is accepted, **Hire** the candidate. This provisions the new employee's workforce identity and opens their first engagement in one step.

Result

Your pipeline shows each candidate's stage; a hired candidate becomes a live employee ready for onboarding.

Related

- Raise a hiring requisition
- Add and onboard an employee
- HR & Payroll reference

Add and onboard an employee

Create a new staff member and open their first engagement in one step, or record a later engagement period for an existing employee.

Adding staff from HR Records provisions the person's workforce identity and opens their first engagement together, so you never leave HR to onboard someone. Later spells and re-hires are recorded against the existing employee.

Before you start

- You need permission to manage HR staff for the scope you are hiring into.
- Identity is owned by the workforce layer; HR only orchestrates the creation.
- Have the person's basic details and their engagement terms to hand.

Steps

Add a brand-new staff member

1. Go to **HR !' Records** and add a new staff member.
2. Set the **Scope level** (required) with its matching **Entity**, **Branch**, **Department** or **Position**.
3. Enter the identity: **First name** and **Last name** (both required). Optionally add **Preferred name**, **Work email**, **Work phone** and **Employee number**.
4. Enter the first engagement: **Start date** (required). Optionally set **Employment type** (permanent, fixed term, casual, seasonal, probation, intern or contractor), **End date** (not before the start date), **Probation end date**, **Notice period (days)** (0–365), **Manager** (an existing employee), **Reporting line**, **Work location**, **Job grade**, **FTE** (0–1) and **Working pattern**.

[Screenshot: the add-staff form with identity and engagement sections]

Record a further engagement

5. For an existing person, open a new engagement from their record. Select the **Employee** (required), then set the same engagement fields as above — including **Start date**, **End date**, **Probation end date**, **Confirmation date**, **Notice period (days)**, **Manager**, **HR status**, **Job profile**, **Working title**, **Work location**, **Job grade**, **FTE** and **Working pattern**. You may attach **Document references** and **Readiness metadata**.

[Screenshot: opening a new engagement period]

Result

A new staff member appears in HR Records with an open engagement; existing employees gain a fresh engagement period. Pay amounts, payslips and tax are handled by Payroll, not here.

Related

- Recruit: campaign to hire
- Offboard an employee
- HR & Payroll reference

Offboard an employee

Close an employee's engagement period with an end date and reason, recording whether it ran its course or ended early.

Offboarding closes an open engagement period. You set the leaving date and, optionally, whether the engagement ended normally or was terminated early.

Before you start

- You need permission to manage HR staff for the engagement's scope.
- Confirm the engagement you are closing and the correct leaving date.
- This closes an engagement spell only; pay, final settlements and tax remain with Payroll.

Steps

1. Open the employee in **HR !’ Records** and select the open engagement to end.
2. Enter the **End date** (required) — the last day of the engagement.
3. Optionally set the closing **Status**: **Ended** (the spell ran its course, such as a fixed-term expiry or resignation) or **Terminated** (the spell ended early, such as a dismissal). Only these two closed states are accepted.
4. Optionally add an **End reason** (up to 180 characters) and a **Notice period (days)** value (0–365).
5. Confirm the scope details match the engagement, then save to close it.

[Screenshot: the end-engagement panel with end date and status]

Result

The engagement is closed on the date you set, and its closing status records whether it ended normally or early. The employee's identity and history are retained, and they can be re-engaged later through a new engagement period.

Related

- Add and onboard an employee
- Recruit: campaign to hire
- HR & Payroll reference

Set up job profiles, competencies and KPIs

Author reusable competencies and metrics, then build job profiles that pin required proficiency levels and standing KPIs to each role.

Job profiles describe a role once and reuse it across recruitment, onboarding and performance. You build a library of competencies and metrics, then attach them to each profile with role-specific levels and targets.

Before you start

- You need permission to manage HR master data for the relevant scope.
- Competencies, metrics and job profiles are all scoped — set the **Scope level** and its hierarchy fields when authoring each.
- Build the competency and metric libraries first so you have them to attach to profiles.

Steps

Author a competency

1. Go to **HR !' Master data !' Competencies**. Enter the **Name** (required) and a **Category** (core, leadership, technical or functional — required). Optionally add a **Description** and **Behavioural anchors** for levels **1** to **5** (each may be partly filled).

Author a metric (KPI definition)

2. Go to **HR !' Master data !' Metrics**. Enter the **Name** (required), a **Unit** (currency, percent, count, score or ratio — required) and a **Direction** (higher is better or lower is better — required). Optionally add a **Description** and a **Category**.

[Screenshot: a metric definition with unit and direction]

Build a job profile

3. Go to **HR !' Master data !' Job profiles**. Enter the **Title** (required). Optionally set a **Job family**, a **Grade band**, a **Purpose**, up to 60 **Responsibilities**, and an **Interview guide** (up to 30 stages, each with a stage name and optional focus).

[Screenshot: the job profile editor with responsibilities and interview guide]

Attach competencies and KPIs to the profile

4. Attach a competency: select the **Competency** and set the **Required level** (1–5, required). Optionally add a **Weight** (0–100) and **Notes**.
5.

Attach a KPI: select the **Metric**, and optionally set a role-specific **Target**, a **Weight** (0–100) and **Notes**.

Result

The profile now carries its required competencies and standing KPIs. Requisitions and engagements can reference it, and its content is versioned — editing an active profile cuts a new draft version.

Related

- Assess employee competencies
- Raise a hiring requisition
- HR & Payroll reference

Assess employee competencies

Record an employee's assessed proficiency in a competency at a point in time, building an append-only history of their development.

A competency assessment captures where an employee stands on a competency at a given moment. Each assessment adds a new entry to their history — rows are never overwritten — so you can track development over time.

Before you start

- You need permission to manage HR performance for the employee's scope.
- The competency must already exist in your organisation's library — see setting up job profiles and competencies.
- Assessments are append-only: to correct a rating you record a fresh assessment rather than editing an old one.

Steps

1. Open the employee in **HR !’ Records** (or their performance view) and start a competency assessment.
2. Select the **Competency** (required) from your organisation's library.
3. Set the **Assessed level** (required) — a proficiency from **1** to **5**.
4. Optionally set the **Assessed on** date. If left blank, the assessment is dated as recorded.
5. Optionally choose a **Source**: **Manual**, **Review** or **Recruitment** — how the assessment was reached.
6. Optionally name the **Assessor** (an existing employee in your organisation) and add a **Note** (up to 500 characters).

[Screenshot: the competency assessment form with level and source]

Result

A new entry is added to the employee's competency history at the assessed level, tagged with its source and assessor. Because the history is append-only, earlier assessments remain intact, so you can see how proficiency has moved against the required levels on their job profile.

Related

- Set up job profiles, competencies and KPIs

- Add and onboard an employee
- HR & Payroll reference

Set up leave and handle requests

Define leave types with accrual and carry-over rules, then capture, approve or decline staff leave requests.

This guide covers configuring the leave types your organisation offers and then processing the requests staff raise against them.

Before you start

- You need HR access to manage leave types and to decide on requests; staff raise their own requests through self-service.
- A leave request must reference a staff member and a leave type that belongs to your organisation.
- Weekends and public holidays are excluded from the calculated day count.

Steps

Define a leave type

1. Go to **HR !' Leave** and add a leave type. **Name** is required. You may add a **code**, a **Default allowance (days)**, and choose an **Accrual method** (annual upfront, monthly, or per pay period) with an **Accrual rate (days/period)**.
2. Set the carry-over policy: **Max balance (days)**, **Carry-over cap (days)** and **Carry-over expiry (months)**. You can also enable seniority-based accrual, prorate the allowance on hire, and mark the type active or inactive.

[Screenshot: the leave type form showing accrual and carry-over fields]

Raise a leave request

3. Choose a **Leave type**, a **Start date** and an **End date** (which must be on or after the start date). A **Reason** is optional, and you may record a number of **days**. The panel shows the remaining balance for the selected type. You cannot set the status yourself — it is driven by the approval flow.

[Screenshot: the leave request form with the available-balance hint]

Decide on a request

4. Open a pending request and approve or decline it. You may add an optional **decision note** to explain the outcome.

Result

Approved leave draws down the employee's balance for that leave year, and the request status reflects the decision. Pending approvals and staff currently on leave are surfaced on the HR overview.

Related

- Capture attendance
- Set up shifts and rosters
- HR & Payroll reference

Capture attendance

Manually mark a staff member's daily attendance status and recorded working time.

This guide covers marking a staff member's attendance for a given day when it is recorded by hand rather than derived automatically.

Before you start

- You need HR access to mark attendance for other staff.
- Attendance inherits its scope from the employee it references, so you only supply the record's own details.
- Only manually markable statuses are accepted here. On-leave and holiday are derived by the daily register and are never set by hand.

Steps

Mark a day

1. Go to **HR !’ Attendance** and choose the staff member and the **attendance date** to mark.
2. Set the **status** to one of the manually markable values: **present**, **absent**, **late**, **half day** or **excused**.
3. Optionally record the **worked minutes** for the day (up to a full 24-hour day) and add **notes**.

[Screenshot: the attendance mark showing status and worked minutes]

Review the register

4. The daily register shows each employee's status for the period, including those automatically flagged as on leave, so you can see the full picture alongside your manual marks.

[Screenshot: the daily attendance register]

Result

The attendance record is saved (or updated) against the employee for that date, contributing to attendance summaries and the count of staff on leave shown on the HR overview.

Related

- Capture and approve timesheets
-

Set up shifts and rosters

- HR & Payroll reference

Capture and approve timesheets

Open a weekly timesheet for a staff member, log time entries against Operations work, and move the sheet through submit and approve.

This guide covers creating a period timesheet for a staff member, adding time entries, and taking the sheet through its approval flow.

Before you start

- You need HR access to open timesheets and decide on them; staff can log their own time.
- A timesheet inherits its scope from the employee it references, so you supply only the sheet's own details.
- The sheet status is never set directly — it is driven by the submit and approve flow.

Steps

Open a timesheet

1. Go to **HR !' Timesheets** and start a sheet for a staff member. Provide the **Period start** and **Period end** (which must be on or after the start). **Notes** are optional.

[Screenshot: the timesheet header with the period fields]

Log entries

2. Add a line to the sheet. Each entry needs a **Work date** and a duration entered as **Hours** (stored as minutes). A **Task** description is optional, and you can mark the line **Billable**.
3. To attribute time to Operations work, pick a real project or work order rather than typing a raw identifier; the entry stores that structured reference. An entry without a pick (for example, internal time) is still valid.

[Screenshot: adding a timesheet entry with the project picker]

Submit and approve

4. When entries are complete, submit the sheet. An approver then approves it, at which point the logged time is treated as approved hours.

Result

Entries roll up into the sheet's total time, and approved sheets contribute to approved hours on the HR overview. Time attributed to Operations projects and work orders remains available to the Operations time reader.

Related

- Capture attendance
- Set up shifts and rosters
- HR & Payroll reference

Set up shifts and rosters

Define reusable shift templates and assign staff to shifts on specific dates.

This guide covers building your library of shift templates and then rostering staff onto shifts day by day.

Before you start

- You need HR access to define shift templates and to assign the roster.
- Shift templates are scoped like other HR definitions; roster assignments inherit their scope from the employee they reference.
- Each assignment must reference a shift template or carry an ad-hoc time window.

Steps

Create a shift template

1. Go to **HR !’ Shifts** and add a template. **Name**, **Start** and **End** are required (start and end are times). You may set **Break (minutes)**, a **Colour** and a **Label**, and mark the template active or inactive.

[Screenshot: the shift template form with start, end and break]

Assign the roster

2. Open the roster grid and pick the staff member and the **roster date**.
3. Either choose a **shift template** for that cell, or provide an ad-hoc window with a **start** and **end** (the end must be on or after the start). You must supply one of these — a template or an ad-hoc start. **Notes** are optional.

[Screenshot: the roster grid with a shift assigned to a cell]

Adjust an assignment

4. Clear a cell to remove an assignment, or assign a different template. The roster reads alongside attendance so you can compare scheduled shifts with actual attendance.

Result

Assigned shifts appear on the roster grid for the period, giving a clear scheduled view per staff member that pairs with recorded attendance.

Related

- Capture attendance
- Capture and approve timesheets
- HR & Payroll reference

Run a performance cycle

Open an appraisal cycle, set goals, and complete reviews with competency ratings and KPI actuals.

This guide covers running an organisation-wide performance cycle: opening the cycle, setting goals, and completing each staff member's review.

Before you start

- You need HR access to open cycles and manage reviews.
- Cycles and reviews are organisation-scoped. Status and sign-off move only through dedicated actions (such as close, finalise and acknowledge) and are never set directly.

Steps

Open a cycle

1. Go to **HR !' Performance** and create a cycle. **Name**, **Period start** and **Period end** are required (end on or after start). You may set a **Type** (annual, quarterly, probation or project) and **Notes**.

[Screenshot: the performance cycle form]

Set goals

2. Add a goal for a staff member (optionally attached to a review). **Title** is required. Optional fields include **Description**, **Metric / target**, **Weight (%)**, **Due date** and progress percent. On update you may set the status to open, in progress, missed or cancelled; achieved is reached only through the complete action.

[Screenshot: a goal with metric, weight and due date]

Complete a review

3. Create a review within the cycle for a staff member, and optionally name a **reviewer**. Record an **Overall rating (1–5)**, written **summary**, **strengths** and **improvements**. You may adjust the layer weights (KPI, competency and objective).
4. For each role competency on the review, record the **assessed level (1–5)** with an optional comment. For each role KPI, record the **actual** value with an optional comment — the attainment percentage is computed for you and is never entered by hand.

[Screenshot: the review with competency ratings and KPI actuals]

Result

Reviews carry an overall weighted score built from the KPI, competency and objective layers. Cycle progress and review completion are shown on the HR overview, and staff can acknowledge their finalised reviews.

Related

- Manage training and certifications
- Manage a disciplinary case
- HR & Payroll reference

Manage a disciplinary case

Open an employee-relations case, log actions, and issue formal warnings through their proper endpoints.

This guide covers opening a disciplinary case for a staff member, recording the steps taken, and issuing a formal warning.

Before you start

- You need HR access to open and manage disciplinary cases.
- Cases are organisation-scoped. Status, decision and outcome move only through dedicated actions (decide and close) and are never set directly on the case.

Steps

Open a case

1. Go to **HR !’ Disciplinary** and open a case for a staff member. **Category** (misconduct, attendance, performance, policy breach, grievance or other), **Severity** (low, medium or high) and **Title** are required. Optionally add a **Description**, an **opened-on** date, name the person who raised it, and mark the case **confidential**.

[Screenshot: the disciplinary case form with category and severity]

Log an action

2. Record a step in the case's action log. Choose an **action type** (note, investigation, meeting, suspension, dismissal, appeal or resolution) and enter a **summary**. Optionally add an **occurred-on** date, an **actor** and a document reference (a stored-document reference only, never a file). A warning is issued through its own step, not here.

[Screenshot: adding an action to the case log]

Issue a warning

3. Issue a formal warning against the case. Choose a **warning level** (verbal, first written or final written). Optionally add a **reason**, an **issued-on** date, an **expiry date** and a document reference. Acknowledgement is a separate self-service action and is not set when issuing.

[Screenshot: issuing a warning with its level and expiry]

Result

The case carries its category, severity and full action log, and any warnings are recorded against the staff member. Staff can acknowledge warnings themselves, and outstanding acknowledgements are surfaced to them.

Related

- Run a performance cycle
- Manage training and certifications
- HR & Payroll reference

Manage training and certifications

Build a training course catalogue, enrol staff on training records, and track the certifications they hold.

This guide covers keeping your training catalogue, recording staff training, and tracking certifications and their expiry.

Before you start

- You need HR access to manage courses, records and certifications.
- Training records and certifications inherit their scope from the employee they reference.
- Course cost context is metadata only — it carries no payroll or accounting entries and is rejected if it contains them.

Steps

Add a course

1. Go to **HR !' Training & Certifications**and add a course. **Name** is required. Optional fields include **Description**, **Category**, **Provider** and **Default duration (hours)**, and you can mark the course active or inactive.

[Screenshot: the training course form]

Record training

2. Add a training record for a staff member. **Title** is required; you may link it to a catalogue course or leave it as ad-hoc external training. Optionally set a **start date**, a **completion date**, a **result**, a **provider** and **notes**. The status is driven by the store and complete actions, not set directly.

[Screenshot: a training record with course, dates and result]

Track a certification

3. Add a certification a staff member holds. **Certification** name is required. Optionally record the **Issuing body**, a certificate reference (a stored-document reference only), an **Issued on** date, an **Expiry date** and **notes**. Status follows the lifecycle actions (such as revoke) and the shared expiry machinery.

[Screenshot: a certification with issuing body and expiry]

Result

Training records and certifications are held against each staff member. Certifications approaching their expiry are surfaced on the HR overview so you can act before they lapse.

Related

- Run a performance cycle
- Manage a disciplinary case
- HR & Payroll reference

Set up a payroll calendar

Create a per-entity payroll calendar that sets pay frequency, currency and the offset days that drive each period's cut-off, approval, payslip and posting dates.

A payroll calendar is the timetable that every payroll run for a legal entity is built against. It fixes the pay frequency, the base currency and the offset days that generate each period's cut-off, approval, bank submission, payslip and posting dates. Set one up per entity before you configure profiles or run payroll.

Before you start

- You need permission to manage payroll settings for the entity.
- Confirm the legal entity the calendar belongs to — a calendar is tied to one entity and the entity cannot be changed later.
- Note that only **monthly** pay frequency is enabled in this version; other frequencies are modelled but not yet activated.

Steps

1. Open the **Payroll** workspace and go to the **Calendar** panel.
2. Select the **entity** the calendar belongs to. This is required when creating and is fixed once saved.
3. Enter a **Name** for the calendar (required, up to 180 characters).
4. Choose the **Pay frequency** (required). Only **Monthly** is accepted; any other value is rejected.
5. Set the **Base currency** (required) as a three-letter currency code, for example KES or ZAR.
6. Optionally set the scheduling offsets, all of which are optional:
7. Optionally switch on **Working day adjust** so dates that fall on non-working days shift automatically.
8. Save the calendar.

[Screenshot: Payroll Calendar panel with entity, name, frequency, currency and offset fields]

Result

The entity now has a payroll calendar. Periods generated from it inherit the frequency, currency and offset days you set, so each run's cut-off, approval, bank, payslip and posting dates are calculated consistently.

Related

-

HR & Payroll reference

- Set your payroll policy
- Set an employee's payroll profile
- Run monthly payroll

Configure pay components

Create a payroll component master with a typed calculation rule, accounting mapping, statutory flags, display order and visibility that every payroll run consumes.

Everything on a payslip is a payroll component: earnings, deductions, employer contributions, statutory items and informational lines. Each component carries a typed calculation rule and settings that every run reads. This guide covers creating and editing a component.

Before you start

- You need permission to manage payroll components.
- Decide the component type and how it should calculate (fixed amount, percentage of something, a rate table, or a registered formula).
- Editing an active component cuts a new draft version from your changes rather than altering the live one.

Steps

1. Open the **Payroll** workspace and go to the **Components** panel.
2. Enter a **Code** (required, uppercase letters, digits and underscores only, up to 60 characters).
3. Enter a **Name** (required, up to 180 characters).
4. Choose the **Component type** (required): Earning, Deduction, Employer contribution, Statutory or Informational.
5. Set the **Calculation rule** (required) by choosing a type:
6. Optionally set the **Accounting mapping**: **GL account reference** and **cost centre reference**.
7. Optionally set the **Statutory flags**: **Taxable**, **Pensionable** and **Leviable**.
8. Optionally set the **Display order** (0–100000) to control ordering on the payslip.
9. Optionally set **Visibility**: **Payslip visible** and **ESS visible**.
10. Save. Status is managed by the system, not entered here.

[Screenshot: Component form showing code, type and the calculation-rule selector]

Result

The component is saved as a master with a working version. Active components publish; edits create a new draft version so live runs stay stable until you publish the change.

Related

- HR & Payroll reference
- Set an employee's payroll profile
- Run monthly payroll

Set your payroll policy

Define per-entity payroll rules for proration, FX rate date, minimum-wage and net-pay-floor behaviour, working days and rounding.

The payroll policy holds the per-entity calculation rules the engine applies during a run, such as how to prorate part-period pay, which date to take FX rates on, and how to handle minimum-wage and net-pay-floor situations. Sensible founder defaults apply to any field you leave blank.

Before you start

- You need permission to manage payroll settings.
- Confirm the entity the policy belongs to.
- You only need to set the fields that differ from the defaults; omitted fields fall back to the founder-decided defaults (calendar-day proration, pay-date FX, warn on minimum wage, carry-forward net-pay floor).

Steps

1. Open the **Payroll** workspace and go to the **Settings** panel.
2. Select the **entity** (required) the policy applies to.
3. Optionally set **Working days per month** (1–31).
4. Optionally choose the **Proration basis**: **Calendar day** or **Working day**.
5. Optionally choose the **FX rate date**: **Pay date** or **Period end**.
6. Optionally choose the **Minimum wage floor behaviour**: **Warn** or **Ignore**.
7. Optionally choose the **Net pay floor behaviour**: **Carry forward** or **Write off**.
8. Optionally set the **Rounding increment** (0–1000).
9. Save the policy.

[Screenshot: Payroll policy settings with proration, FX and floor-behaviour selectors]

Result

The entity's payroll policy is saved. Every run for that entity applies these rules, and any field you left blank uses the platform default.

Related

- HR & Payroll reference
- Set up a payroll calendar
- Run monthly payroll

Set an employee's payroll profile

Link an employee to a payroll calendar and set the calculation inputs — employment category, pay currency, base salary and salary basis — that drive their pay.

A payroll profile connects an employee to a payroll calendar and holds the calculation inputs a run needs for that person. Bank and tax details are not entered here — they are read from the employee's HR record.

Before you start

- You need permission to manage payroll profiles.
- The employee and the payroll calendar must already exist.
- Only the **Permanent** employment category is enabled in this version; the others are modelled but not yet activated.

Steps

1. Open the **Payroll** workspace and go to the **Profiles** panel.
2. Select the **employee** (required when creating; fixed afterwards).
3. Select the **payroll calendar** (required when creating; fixed afterwards).
4. Optionally choose the **Employment category** — only **Permanent** is accepted.
5. Optionally set the **Pay currency** as a three-letter code. If left blank it defaults to the calendar's base currency.
6. Optionally set the **Base salary amount** (a non-negative number).
7. Optionally set the **Base salary component code** to tie the salary to a specific pay component.
8. Optionally choose the **Salary basis**: **Calendar monthly** or **Annual**.
9. Save the profile.

[Screenshot: Payroll profile form with employee, calendar and salary inputs]

Result

The employee is linked to the calendar with their calculation inputs recorded. When a run is calculated for that calendar's period, this profile drives their gross-to-net figures. Employee and calendar are fixed once saved — re-keying a profile is not allowed.

Related

- HR & Payroll reference
- Set up a payroll calendar
- Configure pay components
- Run monthly payroll

Manage statutory rates and estimates

Maintain effective-dated statutory rate blocks for Kenya and South Africa, mark them confirmed or provisional, and run a gross-to-statutory estimate preview.

Statutory rates are the country rule blocks the payroll engine reads for tax and contributions. IXL CORE ships rate packs for **Kenya (KE)** and **South Africa (ZA)**. This guide covers editing a rate block and running the estimator; the exact rate values stay provisional and specialist-owned.

Before you start

- Editing rates needs the manage-statutory permission; running an estimate needs the view permission.
- A regulatory change should normally be entered as a **new effective-dated row**, not an in-place edit. In-place correction is only for a not-yet-effective or provisional row.
- Only the **shape** of the rate data is validated on save; the values themselves are specialist-owned and stay provisional until confirmed.

Steps

Edit a statutory rate

1. Open the **Payroll** workspace and go to the **Statutory** panel.
2. Choose the **Country code** (required): **KE** or **ZA**.
3. Choose the **Statutory type** (required), for example PAYE, NSSF, SHIF, Housing Levy, UIF, SDL or a relief type.
4. Enter a **Label** (required, up to 160 characters).
5. Set **Effective from** (required date) and, optionally, **Effective to** (must be on or after the from date).
6. Enter the **Rate data** block. Its required shape depends on the statutory type — for example a progressive tax needs a non-empty bands or brackets table with `from` and `rate` rows. A malformed block is rejected on save.
7. Optionally set **Is provisional**. Clear it to confirm the block once the specialist has signed off.
8. Optionally add **Notes** (up to 2000 characters).
9. Save.

[Screenshot: Statutory rate editor with country, type, effective dates and rate-data block]

Run a statutory estimate

1. On the **Statutory** panel, choose the **Country code** (required) and enter a **Gross** amount (required).
2. Optionally set the **Effective date**, and optional **earnings**, **references** and **declarations** breakdowns.
3. Run the estimate to see a gross-to-statutory preview with a calculation trace.

Result

The rate block is saved (confirmed or provisional), and the estimator returns a preview of statutory deductions for the country and gross you entered.

Related

- HR & Payroll reference
- Configure pay components
- Run monthly payroll

Run monthly payroll

Walk a payroll run through its lifecycle — draft, calculate, submit for review, approve and close — then generate payslips and export the payment batch.

A payroll run takes a period from a draft to finalised, closed pay. Each step is gated: you can only recalculate before approval, payslips generate only from an approved or closed run, and closing locks the period. Approval enforces segregation of duties — the approver must differ from the preparer.

Before you start

- You need the relevant payroll permissions: manage runs to prepare and calculate, approve to close, and release to export payments.
- The period's calendar, policy, components and employee profiles should be in place.
- A run cannot be created for a period that is already closed.

Steps

1. Open the **Payroll** workspace and go to the **Runs** panel.
2. **Create the run** for the period. It starts in **Draft** with no lines.
3. **Calculate** the run to build its lines and freeze a snapshot; it moves to **Calculated**. Recalculation is allowed only before approval and produces identical numbers each time. Review exceptions on the **Cockpit** before submitting.
4. **Submit for review**. Choose an **Approver** (required) who must be a different user from the preparer. The run moves to **In review**. A run pending approval cannot be recalculated — reject it back to the preparer first.
5. The approver **approves** the run (moving it to **Approved**) or **rejects** it (returning it to the preparer as **Rejected** to recalculate). An optional decision note can be added.
6. **Generate payslips** from the approved or closed run — one payslip per run line, stored as PDFs. Affected employees receive an in-app notice and, where enabled, an emailed payslip.
7. **Export the payment batch** as a bank EFT / CSV of net-pay lines. Release requires the release permission and can only run once.
8. **Close** the approved run. It becomes immutable and locks its period.

[Screenshot: Runs panel showing a run's lifecycle status and the Cockpit review]

Result

The run is finalised: payslips are issued, the payment batch is exported for the bank, and the closed period is locked so no silent edits can occur.

Related

- HR & Payroll reference
- Set up a payroll calendar
- Set an employee's payroll profile
- Manage statutory rates and estimates