

Accord eHR

HR Administrator Guide

The complete manual, including eHR Portal Management.

- 01 Getting Started
- 02 Dashboard
- 03 Self Service
- 04 Team Admin
- 05 eHR Portal Management
- 06 Troubleshooting & FAQ

Contents

01 Getting Started

- Introduction to Accord eHR
- Signing in
- Resetting a forgotten password
- Changing your password
- Finding your way around

02 Dashboard

- Dashboard overview
- Attendance on the dashboard
- Leave, pay day and holidays
- Company updates

03 Self Service

- Self Service overview
- My Profile
- Applying for leave
- Viewing and declaring your timesheet
- Informing outdoor duty
- Viewing your payslips
- Declaring investments
- Applying for a loan
- Applying for a salary advance
- Knowledge Center
- Organisation chart

04 Team Admin

- Team Admin overview
- Team member records
- Approving leave
- Approving timesheet corrections
- Approving outdoor duty
- Approving profile changes and documents
- Approving investment declarations
- Approving loans and salary advances

05 eHR Portal Management

- eHR Portal Management overview
- User access permissions
- Approval workflows
- Reporting matrix and organogram
- User impersonation
- Organizational information
- General masters
- Organizational parameters
- Email settings
- Dashboard welcome note
- Managing dashboard cards
- Managing Self Service sections
- Publishing notices, news and events
- Polls, policies and helpdesk contacts

06 Troubleshooting & FAQ

- Troubleshooting & FAQ

Select any title to jump to it. Your PDF viewer's bookmarks panel lists every section too.

CHAPTER 1

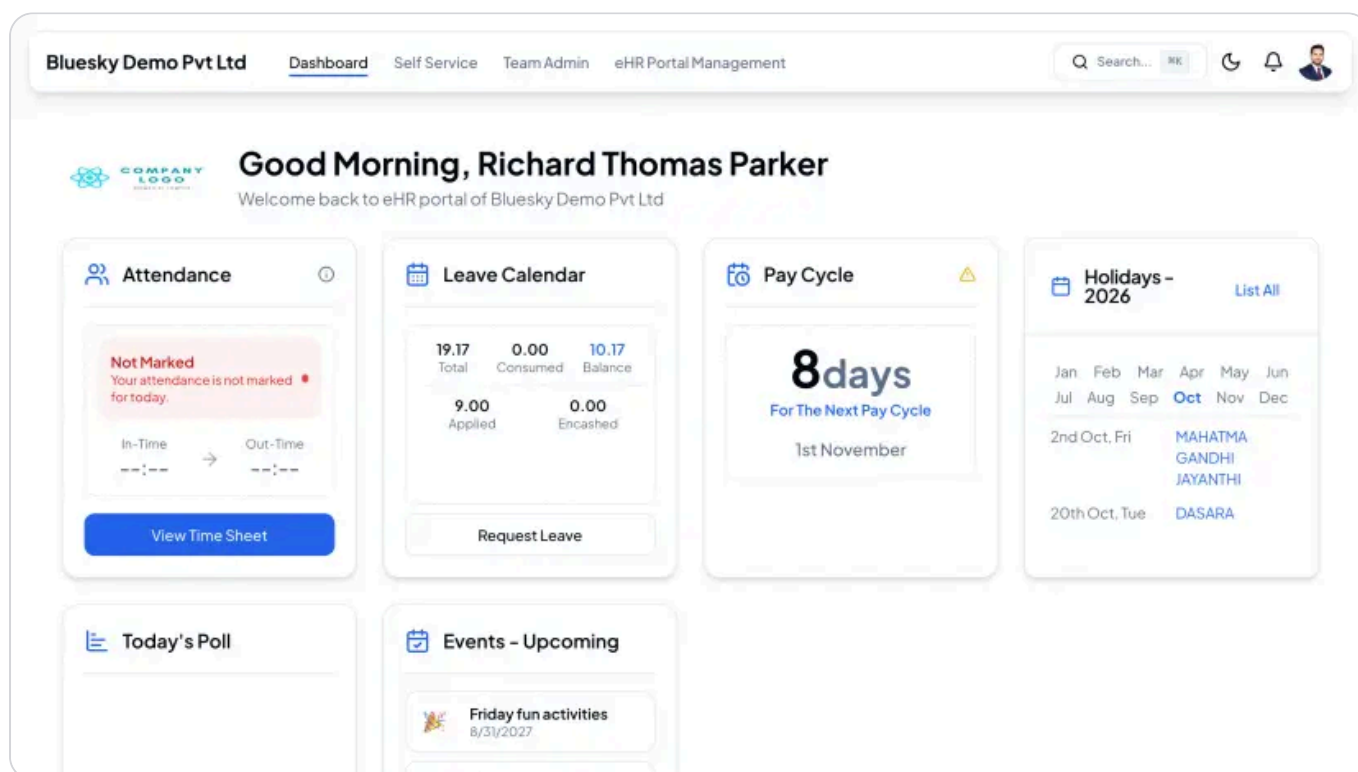
Getting Started

Sign in, find your way around and set up your account.

Introduction to Accord eHR

What Accord eHR does, the four areas of the portal, and which parts you will see based on your role.

Accord eHR is your company's employee portal. You use it to apply for leave, declare your timesheet, download payslips and keep your personal details up to date — and, if you manage people or run HR, to approve requests and configure the portal for everyone else.



The Accord eHR dashboard, the first screen after you sign in

The four areas of the portal

The menu at the top of every screen has up to four items. You only see the ones your role allows.



Dashboard

Today's attendance, your leave balance, holidays, notices, birthdays and company news.



Self Service

Apply for leave, declare timesheets, view payslips, declare investments and update your profile.



Team Admin

For managers: approve your team's leave, timesheets, claims and profile changes.



eHR Portal Management

For HR: user access, approval workflows, masters, dashboard content and policies.

Which parts will I see?

Your role	Dashboard	Self Service	Team Admin	eHR Portal Management
Employee	✓	✓		
Team Admin (manager)	✓	✓	✓	
HR Administrator	✓	✓	✓ if also a Team Admin	✓

Your HR team assigns the Team Admin and HR roles. If a menu item or a Self Service card you expect is missing, see [I can't see a feature](#).



Your company decides which modules are switched on. If your portal doesn't show a feature described here — for example Loan or Outdoor Duty — it has not been enabled for your organisation.

Where to start



Signing in

Your company code, user name and password, and the Remember me option.



Apply for leave

The most common task — find it under Self Service.

Signing in

Sign in to Accord eHR with your company code, user name and password, and choose whether to stay signed in.

You sign in to Accord eHR in two short steps: first your **company code**, then your **user name and password**. Your HR team gives you all three when your account is created.

Before you start

You need:

- **The portal address.** Your company may have its own address (for example `hrconnect.yourcompany.com`); otherwise use the address HR shared with you.
- **Your company code.** A short number that identifies your organisation, such as `301`.
- **Your user name and password.**



If your company uses its own portal address, Accord already knows your company and skips the company code step — you go straight to the user name and password screen.

How to sign in

1

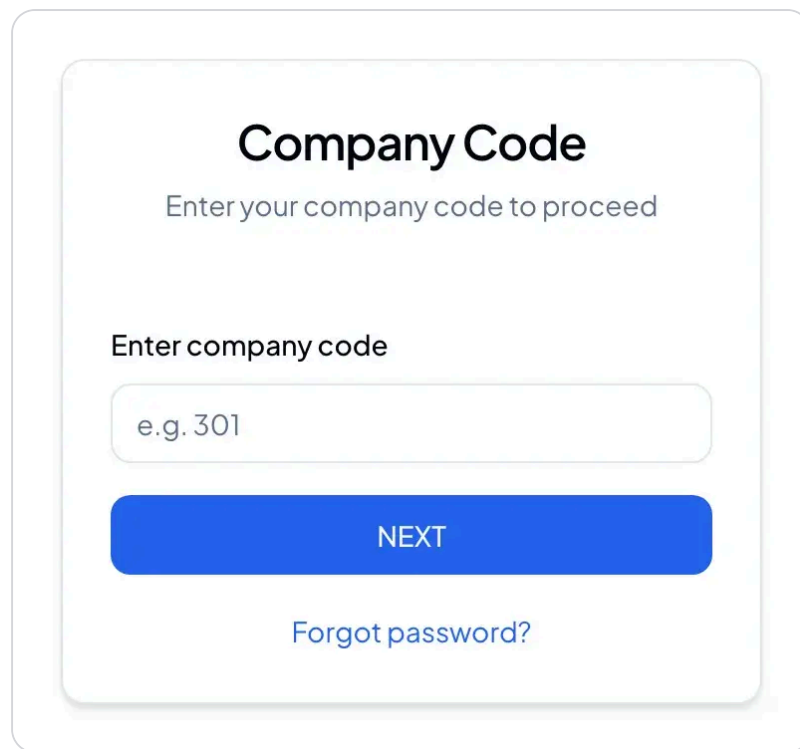
Open the portal

Go to your company's Accord eHR address in Chrome, Edge, Safari or Firefox.

2

Enter your company code

On the **Company Code** screen, type your code in **Enter company code** and select **NEXT**.

A screenshot of a web form titled "Company Code". The form has a light blue border and a white background. At the top, the title "Company Code" is in bold black text. Below it, the instruction "Enter your company code to proceed" is in a smaller black font. Further down, the label "Enter company code" is in bold black text. Below this label is a text input field with a light blue border and rounded corners, containing the placeholder text "e.g. 301". Below the input field is a solid blue button with the word "NEXT" in white capital letters. At the bottom of the form, the text "Forgot password?" is in a blue, underlined font.

Company Code

Enter your company code to proceed

Enter company code

e.g. 301

NEXT

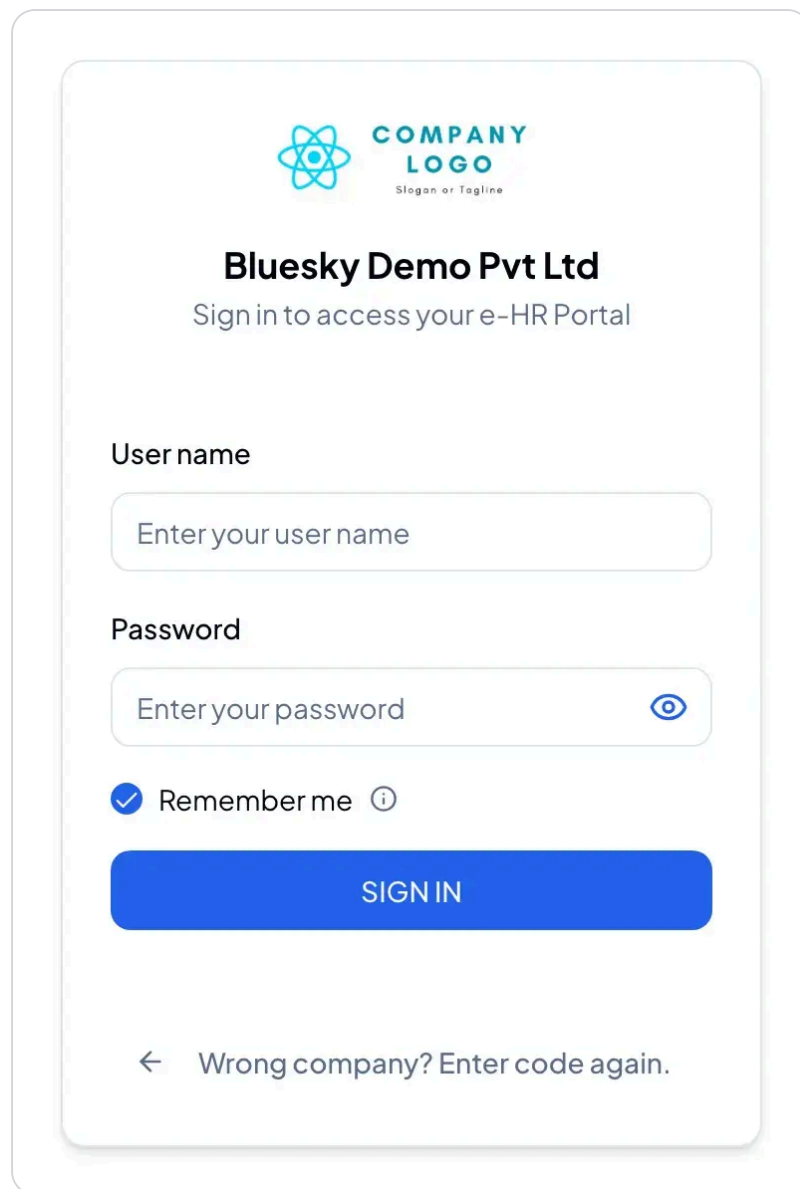
[Forgot password?](#)

Step 1 — enter your company code

3

Enter your user name and password

Your company's name and logo now appear. Type your **User name** and **Password**. Select the eye icon to check what you typed.



 **COMPANY
LOGO**
Slogan or Tagline

Bluesky Demo Pvt Ltd
Sign in to access your e-HR Portal

User name

Enter your user name

Password

Enter your password 

☒ Remember me 

SIGN IN

← Wrong company? Enter code again.

Step 2 — user name, password and Remember me

4 Choose whether to stay signed in

Leave **Remember me** ticked to stay signed in on this device. Untick it on a shared computer — you will be signed out when you close the browser.

5 Select SIGN IN

You land on the [Dashboard](#).



Don't tick **Remember me** on a shared or public computer. Anyone who opens the browser after you would be signed in as you.

Wrong company?

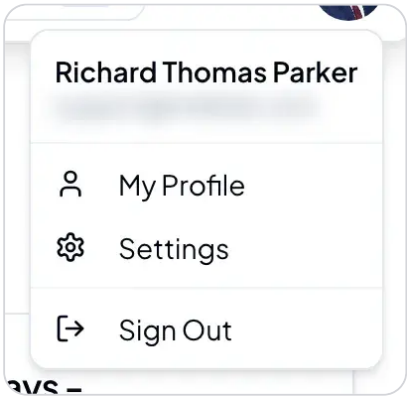
If the screen after the company code shows a different company name, select **Wrong company? Enter code again.** at the bottom of the sign-in card and re-enter your code.

If you can't sign in

Message	What it means	What to do
Incorrect username or password, please try again.	The user name or password doesn't match.	Check Caps Lock and try again, or reset your password .
Logins for this company are currently disabled, please contact Intelliob Support.	Sign-in has been turned off for your organisation.	Contact your HR team, who will check with Intelliob Support.
Too many requests. Please try again later.	Several attempts in a short time.	Wait a few minutes before trying again.
Company details are missing. Please re-enter company code.	The company step didn't finish.	Select Wrong company? Enter code again. and re-enter your code.

Signing out

Select your profile picture at the top right of any screen, then select **Sign Out**.

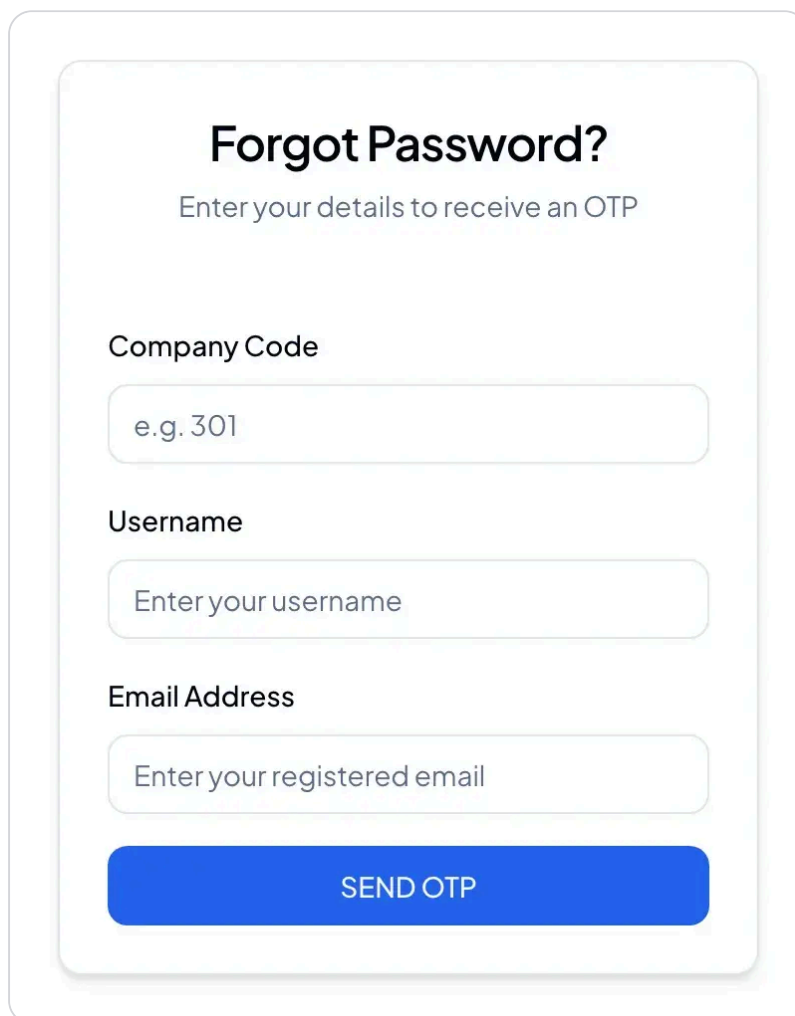


The profile menu: My Profile, Settings and Sign Out

Resetting a forgotten password

Reset your Accord eHR password yourself with a one-time code (OTP) sent to your registered email address.

If you've forgotten your password, you can set a new one yourself. Accord emails a 6-digit one-time code (OTP) to the email address registered on your employee record.



Forgot Password?

Enter your details to receive an OTP

Company Code

e.g. 301

Username

Enter your username

Email Address

Enter your registered email

SEND OTP

The Forgot Password screen

Before you start

You need your **company code**, your **user name** and access to the **email address HR has on file for you**. If that email address is out of date, ask HR to update it first — the code can only go to the registered address.

How to reset your password

1 Open Forgot password

On the sign-in screen, select **Forgot password?** below the **NEXT** button.

2 Enter your details

Fill in **Company Code**, **Username** and **Email Address**, then select **SEND OTP**.

3 Enter the code from your email

Check your inbox for the 6-digit code. Type it into the six boxes and select **VERIFY OTP**.

4 Set a new password

Type your new password in **New Password** and again in **Confirm Password**, then select **RESET PASSWORD**.

5 Sign in again

When you see **Password Reset!**, select **BACK TO SIGN IN** and sign in with the new password.



No email after a minute? Check your spam or junk folder. You can ask for a new code once the **Resend OTP** countdown (60 seconds) finishes.

Messages you might see

Message	What to do
Please enter both your username and email address.	Both fields are required on the first screen.
Please enter the complete 6-digit OTP.	One of the six boxes is empty.
Passwords do not match.	Re-type the same password in both fields.

If your details are correct but no code arrives, your registered email may be wrong — contact HR.

Changing your password

Change your Accord eHR password from Settings while you are signed in.

Change your password any time from **Settings**. You need your current password; if you've forgotten it, [reset it from the sign-in screen](#) instead.

The screenshot shows a web application interface for 'Bluesky Demo Pvt Ltd'. The top navigation bar includes links for 'Dashboard', 'Self Service', 'Team Admin', and 'eHR Portal Management'. A search bar and user profile icon are on the right. The main content area is titled 'Settings' with the subtitle 'Manage your account settings and preferences.' Below this is a 'Change Password' section with the instruction 'Change currently logged in user password.' The form contains three password fields: 'Old Password', 'New Password', and 'Confirm Password', each with a toggle for visibility. To the right of the form is a 'Guidelines for password:' box with three bullet points: 'Password should not be less than eight characters.', 'Alphanumeric password is more secure.', and 'Blank password is not allowed.' A 'Save Password' button is at the bottom left of the form.

Settings — Change Password

How to change your password

1 Open Settings

Select your profile picture at the top right, then select **Settings**.

2 Fill in the three fields

Enter your current password in **Old Password**, then your new one in **New Password** and **Confirm Password**.

3 Save

Select **Save Password**. You'll see **Password changed successfully**.

Password rules

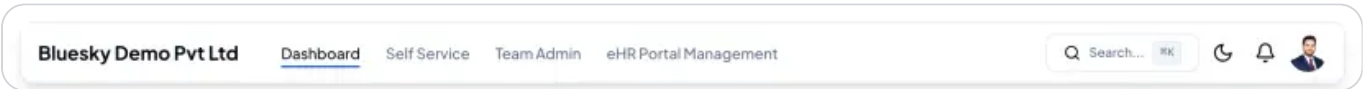
- At least **eight characters**.
- Mixing letters and numbers is more secure.
- It can't be blank.

Message	What it means
All fields are required.	One of the three fields is empty.
New password and confirm password do not match.	The last two fields are different.
Password should not be less than eight characters.	Choose a longer password.
Session details are missing. Please log in again.	Your session expired — sign in and try again.

Finding your way around

The top menu, search, notifications, your profile menu, dark mode and the mobile menu.

Every screen in Accord eHR shares the same header. Once you know it, you can reach anything in two clicks.



The header, from left to right: company name, main menu, search, theme, notifications and your profile

The header

Part	What it does
Company name	Your organisation. Select it to go back to the Dashboard.
Dashboard · Self Service · Team Admin · eHR Portal Management	The main menu. You only see the areas your role allows — see Introduction .
Search...	Jump to any page by name.
Moon / sun icon	Switch between light and dark mode.
Bell icon	Your notifications.
Profile picture	My Profile, Settings and Sign Out.

Search for any page

1 Open search

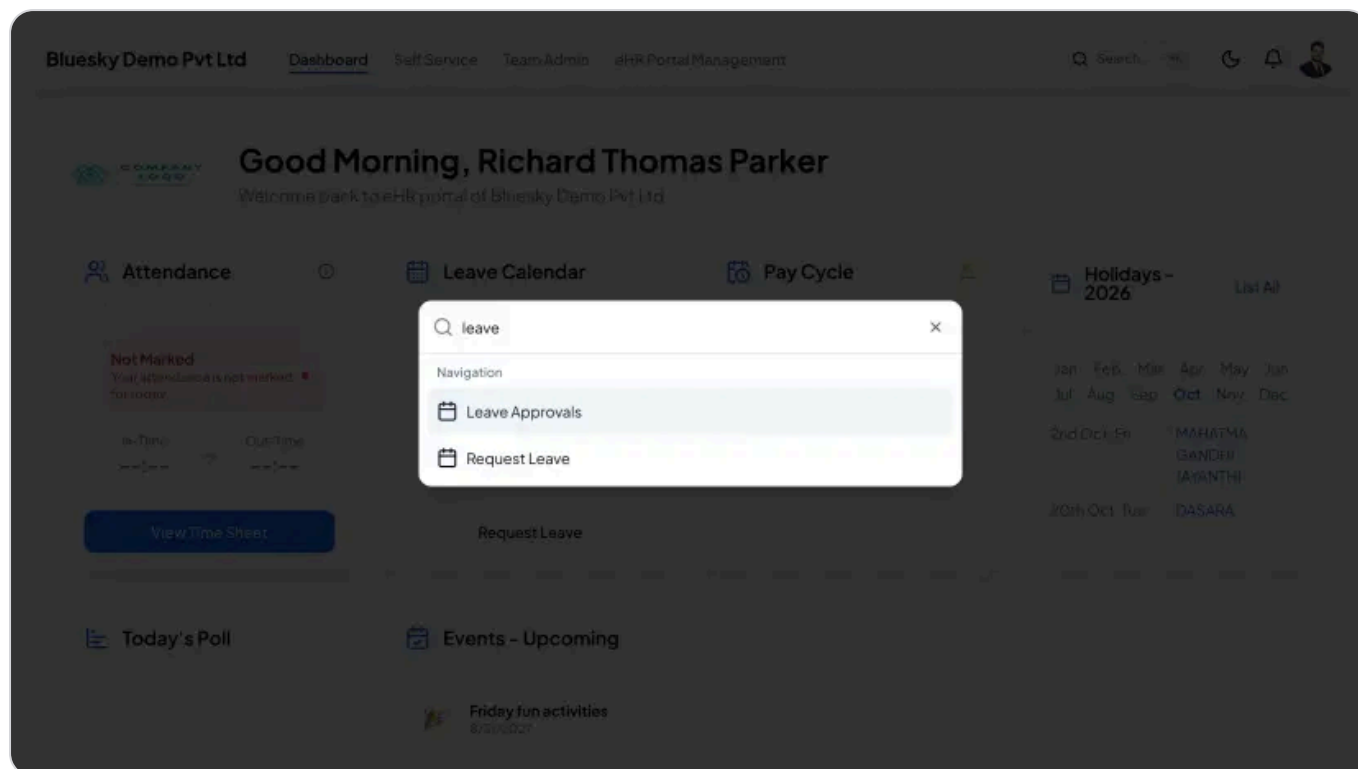
Select **Search...** in the header, or press `Ctrl + K` (`⌘ + K` on a Mac).

2 Type what you're looking for

For example *leave*, *payslip* or *timesheet*. Search matches page names and common words, so *vacation* finds Request Leave.

3 Open the page

Use the arrow keys and press `Enter`, or select the result.



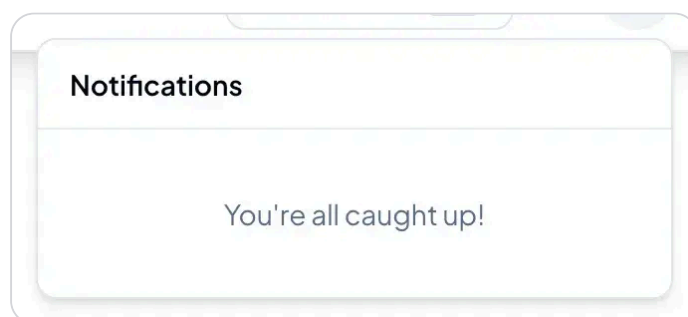
Search finds any page you have access to



Search only lists pages you're allowed to open, so it's also a quick way to check whether a feature is enabled for you.

Notifications

The bell shows a dot when something new arrives — for example a task that's due, a new notice or news article, an upcoming holiday or a new document. Select the bell to see them, and **Mark all read** to clear the list. When there's nothing new you'll see *You're all caught up!*



The notifications panel

Your profile menu

Select your profile picture to open:

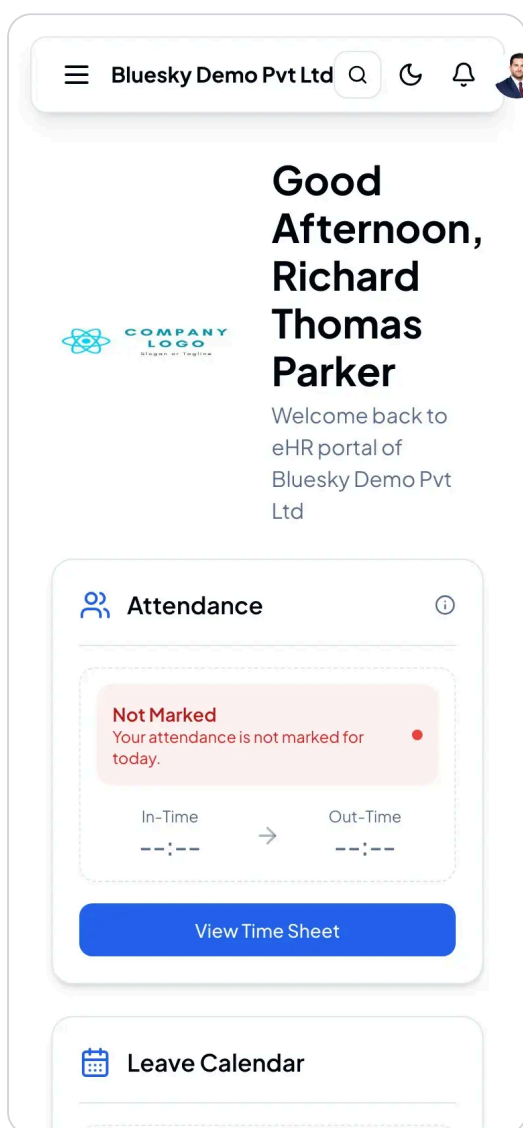
- **My Profile** — your personal and official details. See [My Profile](#).
- **Settings** — [change your password](#).
- **Sign Out**.

Dark mode

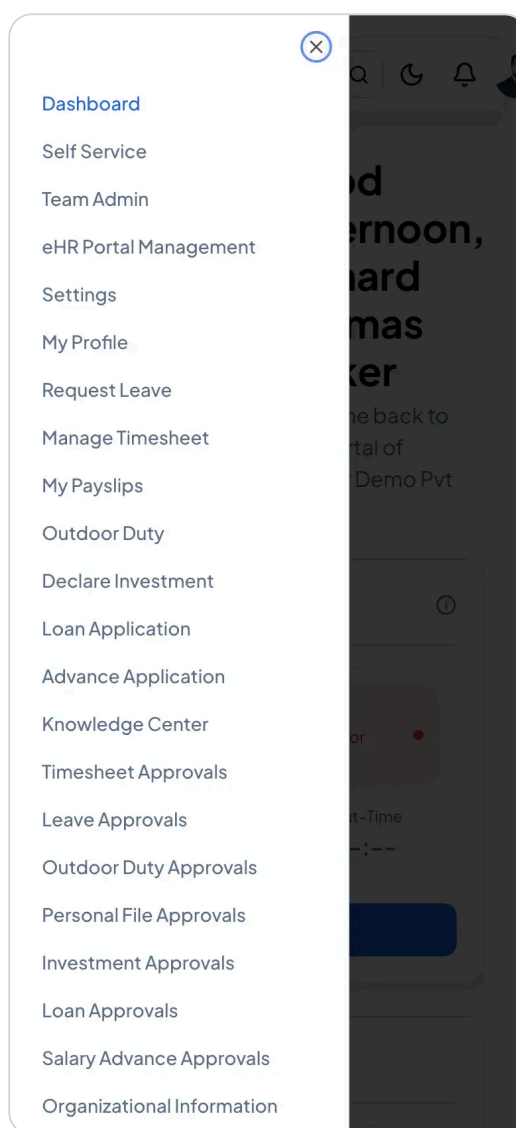
Select the moon icon to switch to dark mode, and the sun icon to switch back. Accord remembers your choice on this device.

On a phone

Accord works in your phone's browser — there's nothing to install. The dashboard cards stack into a single column, and the main menu folds into the ☰ button at the top left.



The dashboard on a phone



Tap ☰ to open the Main Menu

- 1 Open the menu**

Tap **≡** at the top left. The **Main Menu** lists every page you can open — Dashboard, Self Service and each of its modules, and Team Admin or eHR pages if your role includes them.
- 2 Go to a page**

Tap the page. The menu closes and the page opens.



Add Accord to your home screen for one-tap access: in Chrome, open the browser menu and choose **Add to Home screen**; in Safari, tap **Share → Add to Home Screen**.

CHAPTER 2

Dashboard

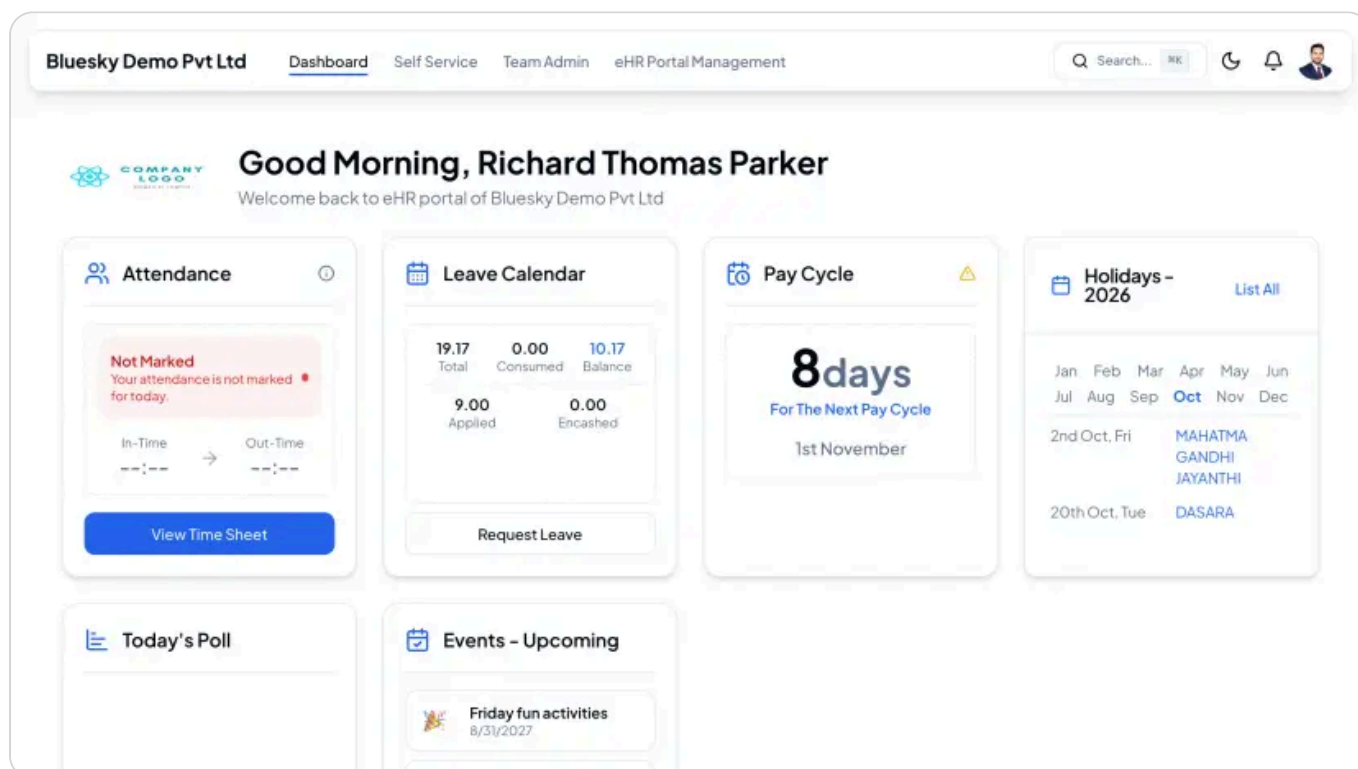
Your attendance, leave calendar, holidays, notices and company news at a glance.

Dashboard overview

The first screen after you sign in — your attendance, leave, pay day, holidays, and what's happening across the company.

The **Dashboard** is your home screen. It greets you by name and brings together what you check most: today's attendance, your leave balance, the next pay day, upcoming holidays, and company notices and news.

Open it any time from **Dashboard** in the top menu, or by selecting your company name.



The Dashboard

The cards

Card	What it tells you	Learn more
Attendance	Whether today's attendance is marked, with your in-time and out-time.	Attendance
Leave Calendar	Your total, consumed, applied, encashed and remaining leave.	Leave, pay day and holidays
Pay Cycle	Days left until the next pay day.	Leave, pay day and holidays
Holidays	This year's holidays, month by month.	Leave, pay day and holidays
Attendance Calendar	Your attendance for each day of the month.	Attendance
Today's Poll · Events - Upcoming · Birthdays - This Week	Company polls, events and colleagues' birthdays.	Company updates
Notices and Announcements · Organization News Highlights	Official notices and company news.	Company updates
Knowledge Center · Helpdesk	Policies and documents, and who to contact for help.	Company updates

 HR chooses which cards appear on your company's dashboard, so yours may show fewer cards than this guide. See [Manage Dashboard Cards](#).

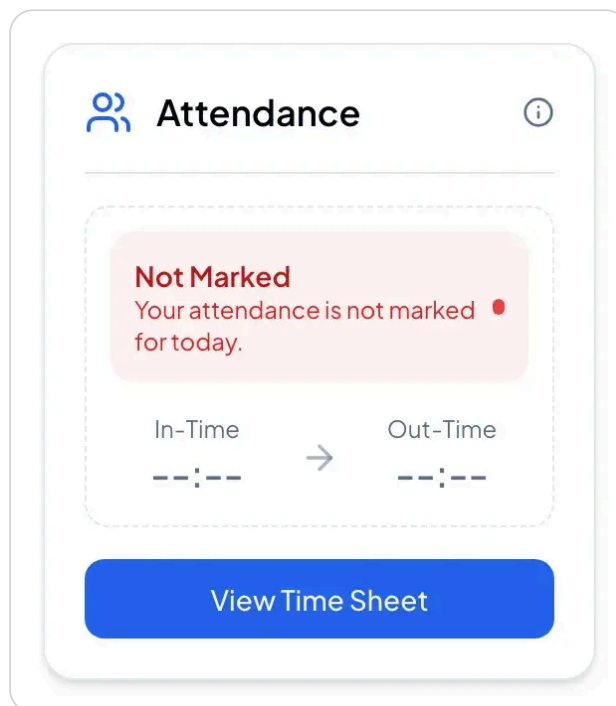
 Many cards are shortcuts: **View Time Sheet** opens your timesheet, **Request Leave** opens Leave Management, and **View All Articles** opens the Knowledge Center.

Attendance on the dashboard

Check whether today's attendance is marked and see your month at a glance on the Attendance Calendar.

Two cards cover attendance: **Attendance** for today, and **Attendance Calendar** for the whole month.

Today's attendance



The Attendance card

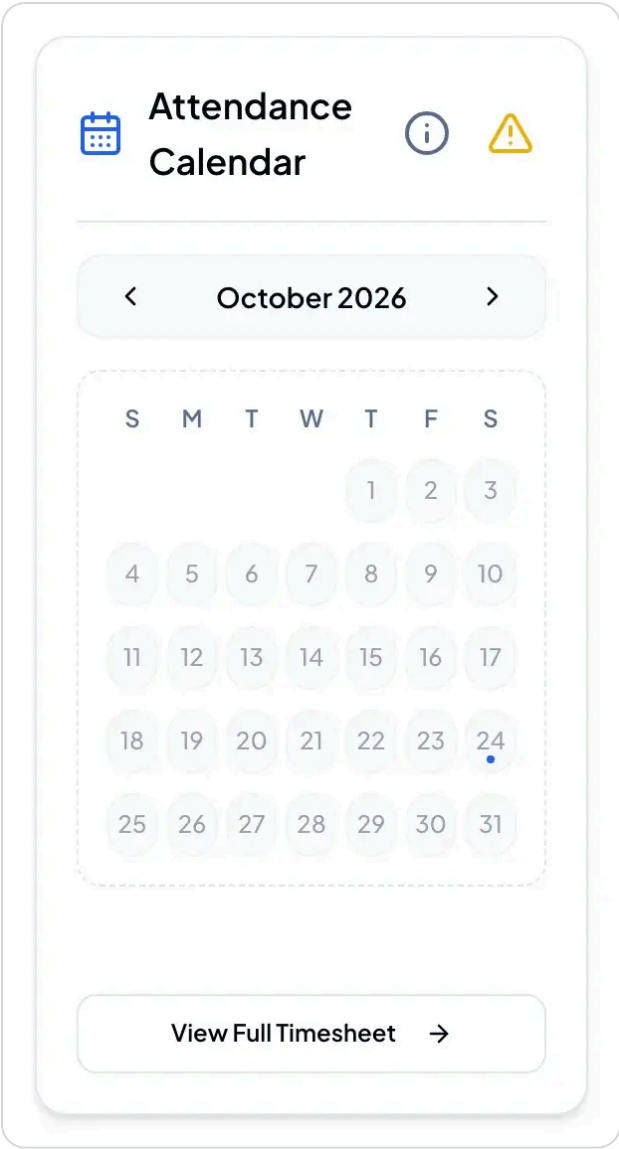
The **Attendance** card shows either:

- **Present Today** — *Your attendance is marked.* — with your **In-Time** and **Out-Time**, or
- **Not Marked** — *Your attendance is not marked for today.*

Select **View Time Sheet** to open your full [timesheet](#).

 This is your current status only. The final status for the day can change based on your company's attendance policies — for example a late arrival or a short day.

Attendance Calendar



The Attendance Calendar

Each day of the month is coloured by status. Select a day to see its **IN TIME** and **OUT TIME**, and use the arrows to move between months. **View Full Timesheet** opens Manage Timesheet.

Select the info icon on the card for the **Attendance Status Legend**:

Status	Meaning
Present	Marked as present
Absent	Marked as absent
Weekly off	Scheduled weekly off
Holiday	Public or local holiday
Half day	Half day present
Leave	CL, SL, EL, AL, etc.
Not marked	No log or punch data

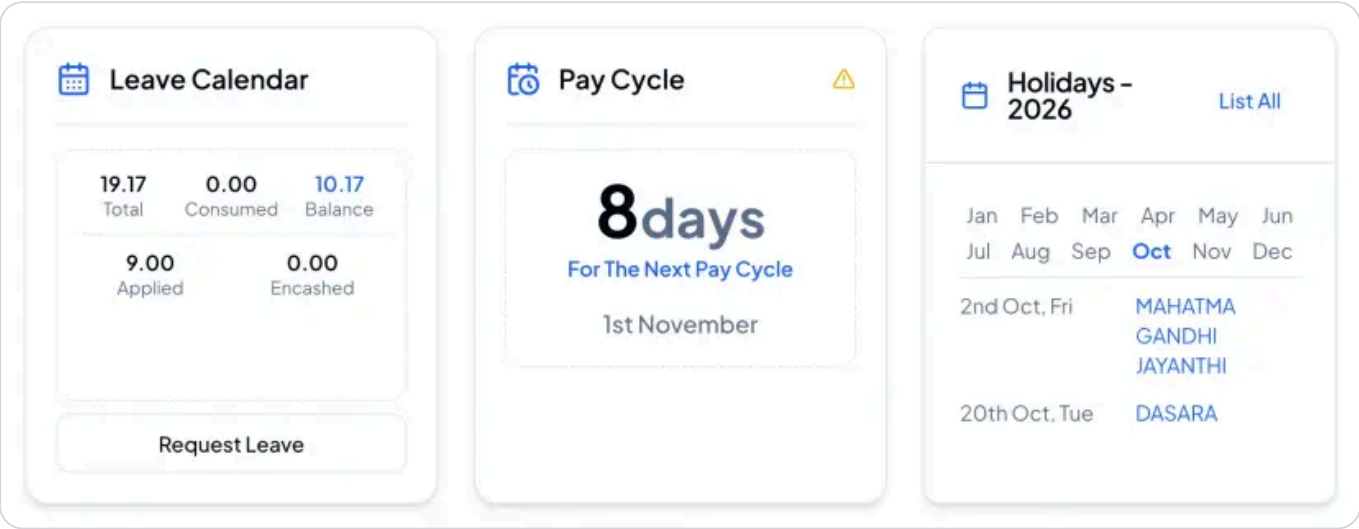
Why isn't today's punch showing?

Attendance from biometric devices can take **up to 3 hours** to appear. If a device has a technical issue it can take longer — wait at least **24 hours** before declaring a correction on your timesheet.

Leave, pay day and holidays

Read your leave balance, see when you'll next be paid, and browse the year's holidays from the dashboard.

Leave Calendar



Leave Calendar, Pay Cycle and Holidays

The **Leave Calendar** card sums up all your leave types:

Figure	Meaning
Total	Leave credited to you.
Consumed	Leave already taken.
Balance	What you can still apply for.
Applied	Leave you've applied for, including applications still awaiting approval.
Encashed	Leave converted to pay.

Select **Request Leave** to [apply for leave](#) and see the balance per leave type.

Pay Cycle

Pay Cycle counts the days to your next pay day and shows the date — for example *8 days · For The Next Pay Cycle · 1st November*.

 This is the expected date. The actual payout can move because of holidays or other circumstances.

Holidays

The **Holidays** card shows this year's holidays. Select a month to list its holidays, or **List All** to see the whole year. Months with no holidays show *No holidays for this month*.

Company updates

Notices, news, events, polls, birthdays, the Knowledge Center and Helpdesk contacts on your dashboard.

The lower half of the dashboard keeps you up to date with the company. HR publishes everything here from [eHR Portal Management](#).

Attendance Calendar

October 2026

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

View Full Timesheet →

Birthdays - This Week

T Today

S Today

Notices and Announcements

5 May

Important Update: Changes to Company Policies

Dear ABC Corporation Team, Here is a link: <https://intelliob.com> We hope this message finds you well. W...

Read More

5 May

Notice of Office Relocation

Dear Employees, We are excited to inform you that ABC Corporation will be relocating its headquarters to a new. stat...

Read More

5 May

Welcome to Accord eHR

Accord eHR is a revolutionary HRMS designed to be quick, reliable and packed with features.

Read More

5 May

This is a test Notice

test

Read More

Organization News Highlights

24th Feb 2026

NewArticle007

21st Feb 2026

Wow, notifications?

20th Feb 2026

New News Heading by Basheer 20102025

Knowledge Center

test

2/21/2026

PolicyDetails

2/20/2026

View All Articles

Helpdesk

Finance

Richard Thomas Parker

DEPUTY GENERAL MANAGER

IT

Rohit Ashish Yadav

EXECUTIVE

Notices, news, Knowledge Center and Helpdesk

Notices and Announcements

Official notices from HR — policy changes, office moves, reminders. Each shows its date and a preview; select **Read More** for the full notice.

Organization News Highlights

Company news and stories, newest first. Select an item to read it.

Events - Upcoming

Upcoming company events with their dates. Where HR has asked for it, you can confirm that you'll attend — you'll see **Attendance Confirmed**.

Today's Poll

When HR runs a poll, pick your answer and submit it. You'll see **Vote Submitted**, then the results. *No poll available today.* means there isn't one running.

Birthdays - This Week

Colleagues with birthdays this week. Send a birthday wish from the card — you'll see **Greeting Sent!**

Knowledge Center

The latest documents HR has published. Use the eye icon to preview and the download icon to save, or **View All Articles** to open the full [Knowledge Center](#).

Helpdesk

Who to contact for what — for example **Finance** or **IT** — with each contact's name, designation, email and phone number.

FROM THE INTELLIOB SUITE · TIMEMATE



Attendance that marks itself

TimeMate connects biometric devices and mobile geo-fencing to your attendance, with shift rostering and payroll-ready reports — and integrates with Accord eHR.

[Explore TimeMate ↗](#)

CHAPTER 3

Self Service

Apply for leave, declare timesheets, download payslips and keep your profile up to date.

Self Service overview

Your personal workspace — profile summary, notes, reporting managers and a card for every request you can make.

Self Service is where you do things for yourself: apply for leave, declare your timesheet, download payslips, declare investments and keep your profile up to date. Open it from **Self Service** in the top menu.

Bluesky Demo Pvt Ltd

DashboardSelf ServiceTeam AdmineHR Portal Management

Search...

🔄🔔👤

Self Service Portal

Manage your personal information and company resources.



Richard Thomas Parker
DEPUTY GENERAL MANAGER

🏠 Change

🕒

Group

INTELLIOB - MUMBAI

Code

5001

Department

HUMAN RESOURCES

Work Location

MAHARASHTRA

Service

3 Year(s)

Age

32 Year(s)

Birth Date

Fri, 25 Feb, 1994

Anniversary

Tue, 13 Aug, 2002

📄 Short Notes

🔍📄🕒📄🔗 Add Note

Test

notes

📄🗑️

I love making new apps

Hello

📄🗑️

Note

Noting

📄🗑️

Test

Testing

📄🗑️

Test

This is a Test Note.

📄🗑️

📅 Request Leave

19.170.0010.17

TotalConsumedBalance

9.000.00

AppliedEncashed

3 Pending

🕒 Outdoor Duty

320

AppliedApprovedRejected

Inform about your outdoor duty assignments.

1 Pending

📅 Manage Timesheet

1313

AppliedApproved

View and declare your monthly timesheets.

13 Pending

📄 My Payslips

₹0₹0₹0

EarningsDeductionsNet Pay

Access and view your payslips.

Latest Available

📄 Declare Investment

₹0₹58,991

Previous YearCurrent Year

Declare your investments for the financial year.

0 Pending

₹ Loan Application

20

AppliedApproved

Apply for a company loan.

2 Pending

₹ Advance Application

31

AppliedApproved

Apply for a salary advance.

2 Pending

👤 My Reporting Managers

Liam Grace Rogers

DIRECTOR

🏢 FINANCE

📧

📞

📞 Call📧 Email

👤 Organogram

View your company's organizational structure.

View Organogram

© 2026 Intelliob Technologies Pvt. Ltd. All rights reserved.

Privacy PolicyTerms of ServiceContact Us

What you'll see

Area	What it shows
Profile card	Your name, designation, employee code, department, work location, length of service and key dates. Select Change on the picture to upload a new profile photo.
Short Notes	Private notes for yourself. Add Note creates one; Expand Notes shows them all.
Request cards	One card per module — Request Leave, Outdoor Duty, Manage Timesheet, My Payslips, Declare Investment, Loan Application and Advance Application. Each card shows a quick summary (for example your leave balance or how many requests are pending). Select a card to open it.
My Reporting Managers	Who your requests go to, with Call and Email shortcuts.
Organogram	Opens your company's organisation chart.

 HR decides which cards appear for your company. If a card described in this guide is missing, it isn't enabled for your organisation.

Guides in this section



My Profile

Update personal details and upload documents.



Leave

Apply, track, cancel or delete leave.



Timesheet

View and declare your monthly timesheet.



Outdoor Duty

Inform HR when you work away from office.



My Payslips

View, print and download payslips and your income statement.



Declare Investment

Declare tax-saving investments and rent with proofs.



Loan Application

Apply for a company loan.



Salary Advance

Apply for an advance against salary.



Knowledge Center

Company policies and documents.



Organisation chart

See who reports to whom.

Short notes

1

Add a note

In **Short Notes**, select **Add Note**, enter a subject and the note, then save.

2

Edit or delete

Use **Edit Note** or **Delete Note** next to any note.

Notes are visible only to you.

My Profile

View your personal and official details, request changes, and upload documents such as certificates and ID proofs.

My Profile holds everything HR knows about you. You can view all of it and request changes to your personal details; changes go to your manager or HR for approval before they take effect.

Open it from your profile picture at the top right → **My Profile**.

Bluesky Demo Pvt Ltd

DashboardSelf ServiceTeam AdmineHR Portal Management

Search...

KK

←

My Profile

View and update your personal information, contact details, and documents.

Personal Details

Official Details

Documents

Richard Thomas Parker

Designation: DEPUTY GENERAL MANAGER | Department: HUMAN RESOURCES

Personal Information

Edit

Full Name

Richard Thomas Parker

Birth Date

Fri, 25 Feb, 1994

Code

5001

Pan No

ABCDEI234A

Alias

R. Parker

Anniversary

Tue, 13 Aug, 2002

AadhaarNo

Marital Status

Married

My Profile — Personal Details

What you'll see

My Profile has three tabs:

Tab	What's in it
Personal Details	Personal information, contact details and addresses, emergency contacts, family and dependants, languages, health and physician details, education, certifications, licences, previous employers, references, passport, military and expatriate information.
Official Details	Office information (group, department, designation, grade, location, work status) and statutory information (PF, UAN, ESIC). These are maintained by HR and are read-only.
Documents	Documents you've uploaded, split into Pending Documents and Approved Documents .

How to update your details

1

Find the section

On **Personal Details**, find the section you want to change — for example **Contact Details**.

2 Open the edit form

Select the edit (pencil) icon on that section. For lists such as **Emergency Contacts** or **Education / Qualifications**, select **Add New** to add an entry, or the edit icon on an existing entry.

3 Make your changes and submit

Update the fields and select **Submit for Approval**.

The image shows a user interface for a company portal. On the left, the 'MyProfile' page is visible, showing the user's name 'Richard Thomas Parker', designation 'DEPUTY GENERAL MANAGER', and department 'HUMAN RESOURCES'. Below this, there is a section for 'Personal Information' with fields for First Name, Middle Name, Last Name, Alias, Birth Date, Anniversary, Aadhaar No, PAN, Gender, Marital Status, Spouse Name, Religion, Handicap Category, and Caste Category. On the right, the 'Edit Personal Information' modal is open, allowing the user to make changes to their personal details. The modal contains the same fields as the 'Personal Information' section, with the current values and the changes being made. The 'First Name' field is highlighted with a blue border, and the 'Last Name' field is also highlighted. The 'Birth Date' field is set to '12/08/2002' and the 'Anniversary' field is set to '12/08/2002'. The 'Aadhaar No' field is set to 'ABCDE1234A' and the 'PAN' field is set to 'ABCDE1234A'. The 'Gender' field is set to 'Male' and the 'Marital Status' field is set to 'Married'. The 'Spouse Name' field is set to 'Elsa Faust' and the 'Religion' field is set to 'Crustafarianism'. The 'Handicap Category' and 'Caste Category' fields are empty.

Editing personal information — changes go for approval

4 Wait for approval

The section shows **Pending Approval** until your manager or HR reviews it. **Your Pending Changes** lists each field with its **Current Value** and **Your Change**.

💡 Spotted a mistake in a change that's still pending? Open the same section again — the button now reads **Update Pending Request**, and saving replaces your earlier request.

🔔 Your current details stay in place until the change is approved. If the change is rejected, nothing is updated — check with your manager and submit it again.

How to upload a document

1 Open the Documents tab

Select **Documents**, then **Upload Document**.

2 Name the document and choose the file

Enter a **Document Name** (for example *Passport Copy*) and pick the file. Files can be up to **4 MB** — PDF, images, Office documents, spreadsheets or archives.

3 Confirm

Select **Confirm Upload**. The document appears under **Pending Documents** until it's approved, then moves to **Approved Documents**.

You can preview or download any document, and delete a document you uploaded by mistake.

Change your profile photo

Select **Upload picture** (or **Change** on the Self Service profile card) and choose an image. The new photo appears straight away.



Keep your **Personal E-mail** and **Mobile** up to date — the [password reset](#) code is sent to your registered email.

Applying for leave

Check your leave balances, apply for full or half-day leave, track approval status, and cancel or delete applications.

Leave Management shows your balance for every leave type, lets you apply, and tracks each application until it's approved.

Open it from **Self Service → Request Leave**, or select **Request Leave** on the Dashboard's Leave Calendar card.

Leave Management — balances and application status

What you'll see

- **Leave posted would require approval from** — who will approve your leave.
- **Apply for Leave** — a tile for each leave type (for example Casual Leave, Privilege Leave, Compensatory Off) showing **Consumed**, **Applied**, **Encashed**, **Total** and the balance you have left.
- **Leave Application Status** — your applications for the selected month, each marked **Pending**, **Approved** or **Rejected**.

How to apply for leave

1 Choose the leave type

Under **Apply for Leave**, select **+** on the leave type you want to take.

2 Pick the dates

Choose the **From Date** and **To Date**. For a single day, pick the same date for both.

3 Choose full or half day

Under **Leave Frequency**, choose **Full Day**, **First Half** or **Second Half**.

4 Add a reason

Type a short **Reason** — your approver sees it.

Authorised Leave

Consumed: 0.00

Applied: 0

Forecasted: 0

Total: 0.00

0.00

Casual Leave

Consumed: 0.00

Applied: 0

Forecasted: 0

Total: 0.00

0.00

Compensatory Off

Consumed: 0.00

Applied: 0

Forecasted: 0

Total: 0.00

1.00

Privilege Leave

Consumed: 0.00

Applied: 0

Forecasted: 0

Total: 0.00

9.17

SPECIAL LEAVE

Consumed: 0.00

Applied: 0

Forecasted: 0

Total: 0.00

0.00

24-Oct-2024 to 24-Oct-2024

0 days + Full Day

Reason

Posted On: Sep 04, 2024

24-Oct-2024 to 24-Oct-2024

0 days + Full Day

Reason

Posted On: Sep 04, 2024

24-Oct-2024 to 24-Oct-2024

0 days + Full Day

Reason

Posted On: Sep 04, 2024

Apply for Privilege Leave

Fill out the form below to submit your leave application.

Leave Type

Privilege Leave

From Date

Pick a date

To Date

Pick a date

Leave Frequency

☒ Full Day ☐ First Half ☐ Second Half

Reason

Please provide a reason for your leave

Cancel

Submit Application

The leave application form

5 Submit

Select **Submit Application**. The application appears under **Leave Application Status** as **Pending**, and your approver is notified.

💡 The **Applied** count on a leave tile includes leave that's still waiting for approval, so your balance already accounts for it.

Track your applications

- Use the month selector to move between months, or **View Full Year** to see the whole year.
- Select **Filter** to show one leave type or one status (**All Leaves / All Status**), then **Apply Filters**.
- Select an application to see the dates, number of days, frequency, reason and when you posted it.

Delete or cancel leave

Situation	What you can do
Still Pending	Delete it. Confirm in Delete Leave Application — this can't be undone.
Approved , date not yet passed	Select Cancel Leave , then confirm. Your balance is restored and your approvers are notified. Choose Keep Leave to back out.
Approved , date already passed	You'll see Leave Cannot Be Cancelled . Contact your manager or HR.

Viewing and declaring your timesheet

See your daily attendance for any month, print a monthly report, and declare corrections for approval.

Manage Timesheet shows your attendance day by day — status, shift, in-time, out-time and total hours. If a day is wrong (a missed punch, work from home, a half day), you **declare** the correct entry and it goes to your manager for approval.

Open it from **Self Service → Manage Timesheet**, or **View Time Sheet** on the Dashboard's Attendance card.

Bluesky Demo Pvt Ltd

DashboardSelf ServiceTeam AdmineHR Portal Management

Search...

RR

←

Manage Timesheet

View or declare your timesheet for the selected month.

Mode

View

Declare

Select Month

October 2026

Print Report

Attendance:

P

A

HD

WO

H

 ...

Date	Shift	Status	In Time	Out Time	Total	OT Hours
No records found						

Manage Timesheet in View mode

View your timesheet

1 Choose View mode and the month

Make sure **Mode** is set to **View**, then pick the month in **Select Month**.

2 Read the table

Each row is a day: **Date**, **Shift**, **Status**, **In Time**, **Out Time**, **Total** and **OT Hours**. The summary above the table counts each status — **P** present, **A** absent, **HD** half day, **WO** weekly off, **H** holiday.

3 Print if you need a copy

Select **Print Report** for a printable monthly attendance report.



If **Print Report** does nothing, your browser blocked the pop-up. Allow pop-ups for the Accord site and try again.

Declare a correction

1

Switch to Declare

Set **Mode** to **Declare** and pick the month. The note at the top shows who will approve your declaration.

2

Change the day's entry

For each day that's wrong, choose the correct status (for example **Present**, **Half Day**, **Work From Home** or **Comp Off Full**) and set the **In-Time** and **Out-Time** where needed.

3

Add a comment

Every changed day needs a comment explaining why — your approver sees it.

Bluesky Demo Pvt Ltd

DashboardSelf ServiceTeam AdmineHR Portal Management

Search...🔍🕒🔔👤

←📅

Manage Timesheet

View or declare your timesheet for the selected month.

Mode

👁️ View✍️ Declare

Select Month📅October 2026

Declare Timesheet

🕒

Timesheet declaration posted would require approval from:
Richard Thomas Parker, DEPUTY GENERAL MANAGER

Attendance:

P

A

HD

WO

H

...

🟢 Approved🟡 Declared — pending approval🔴 Rejected⚪ Not declared🟡 Edited (unsaved)🕒 09:30 AM = declared timing, not final until approved

A day shows the outcome of its latest declaration. Hover a date for who decided it and when.

Date	Status	Shift	Attendance	In-Time	Out-Time	Total	Comments	Be
01 - Thu, Oct	NM	08:00-17:30	Not Marked	-	-	-	Add comments...	-

Declaring corrections, with a comment for each changed day

4

Declare

Select **Declare Timesheet**. You'll see **Timesheet declared successfully**.

Each day then shows the outcome of its latest declaration — **Declared — pending approval**, **Approved** or **Rejected**. Hover a date to see who decided and when. Timings as they were before your edit stay visible for pending and approved days.

Messages you might see

Message	What to do
No Changes — Please modify at least one entry before declaring.	Change at least one day first.
Comments Required	Add a comment to every day you changed.
Timings Required	Set In-Time and Out-Time for all highlighted days.
Insufficient Balance	You don't have enough comp-off balance for the comp-off days you entered.

 Declaring is enabled per company. If **Declare** isn't available, your timesheet is view-only — contact HR for corrections.

Informing outdoor duty

Tell your approver when you work away from the office — at a client site, in the field or at an event — so the day isn't marked absent.

Use **Outdoor Duty** when you're working, but not at your usual office — a client visit, site work, training elsewhere. Once approved, those days count as worked rather than absent.

Open it from **Self Service → Outdoor Duty**.

The screenshot shows the 'Outdoor Duty' section of the eHR portal. At the top, there's a navigation bar with 'Bluesky Demo Pvt Ltd', 'Dashboard', 'Self Service', 'Team Admin', and 'eHR Portal Management'. A search bar and user profile are on the right. Below the navigation, the 'Outdoor Duty' title is accompanied by a back arrow and a clock icon. A message states: 'Outdoor duty request posted would require approval from anyone of the approvers below: Richard Thomas Parker - DEPUTY GENERAL MANAGER'. The 'Application Status' section allows viewing the status of outdoor duty applications for a selected month (October 2026). It features a table with columns for 'Period', 'Status', and 'Remarks'. A note indicates that only outdoor duty with a 'Pending' status can be deleted. There are buttons for 'Inform Outdoor Duty' and 'Delete'. The 'Outdoor Duty Information' section prompts the user to select an application to view details.

Outdoor Duty — application status and details

What you'll see

- The approvers your request will go to — any one of them can approve it.
- **Application Status** — your outdoor duty requests for the selected month, with **Period**, **Status** and **Remarks**.
- **Outdoor Duty Information** — the full details of the request you select.

How to inform outdoor duty

1 Open the form

Select **Inform Outdoor Duty**.

2 Pick the dates

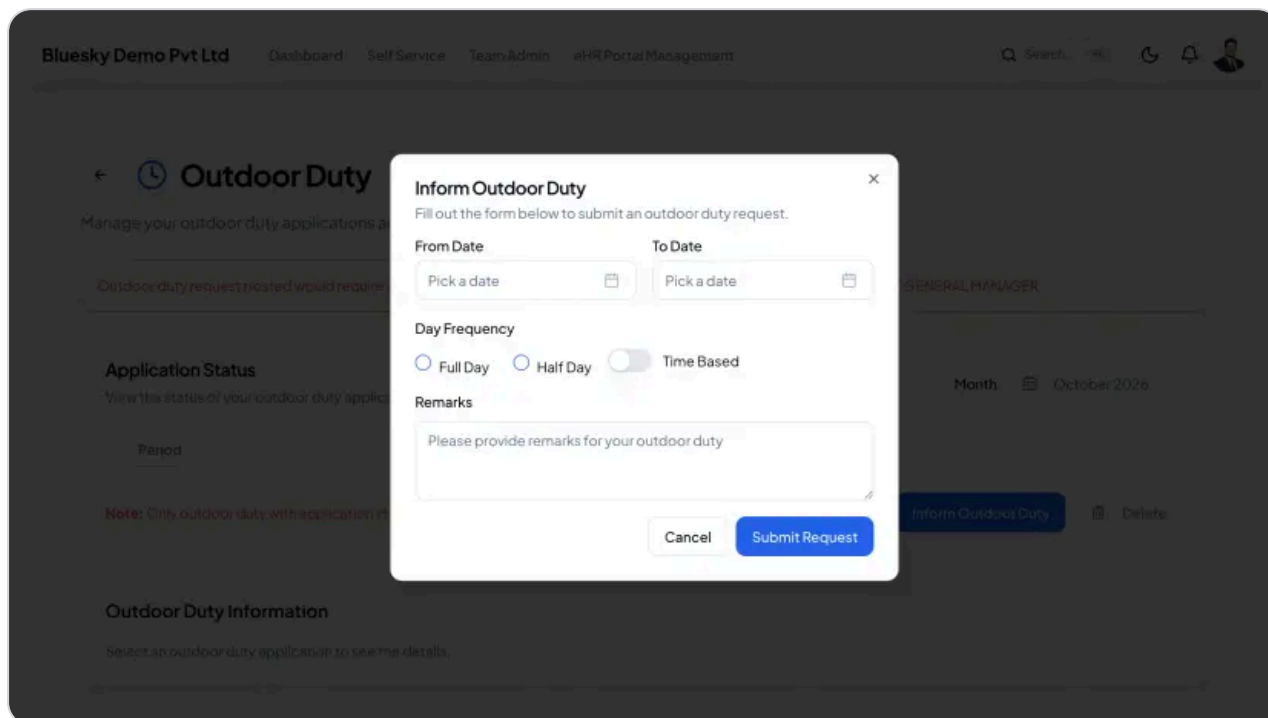
Choose the **From Date** and **To Date**.

3 Choose the day frequency

Under **Day Frequency**, choose **Full Day** or **Half Day** — or switch on **Time Based** and set the **Start Time** and **End Time** for a few hours away.

4 Add remarks

Say where you'll be and why — for example *Client site visit, Andheri*.

The screenshot shows a web application interface for 'Bluesky Demo Pvt Ltd'. The main header includes navigation links: 'Dashboard', 'Self Service', 'Team Admin', and 'HR Portal Management'. A search bar and user profile icon are on the right. The main content area is titled 'Outdoor Duty' with a subtitle 'Manage your outdoor duty applications'. Below this, there's a section for 'Application Status' and a table with columns 'Period' and 'Status'. A modal window titled 'Inform Outdoor Duty' is open, prompting the user to 'Fill out the form below to submit an outdoor duty request.' The form includes fields for 'From Date' and 'To Date' (both with 'Pick a date' buttons), a 'Day Frequency' section with radio buttons for 'Full Day', 'Half Day', and a 'Time Based' toggle, and a 'Remarks' text area with the placeholder 'Please provide remarks for your outdoor duty'. At the bottom of the modal are 'Cancel' and 'Submit Request' buttons. The background shows a sidebar with 'GENERAL MANAGER' and a 'Month' selector set to 'October 2026'.

The Inform Outdoor Duty form

5 Submit

Select **Submit Request**. You'll see **Outdoor duty application submitted successfully**.

Delete a request

Only requests that are still **Pending** can be deleted. Select the request, then **Delete**, and confirm. This can't be undone — after approval, ask your manager to make changes.

Viewing your payslips

View, print and save your monthly payslips, and download your annual income statement.

My Payslips lists every payslip for a financial year and gives you your annual **Income Statement**.

Open it from **Self Service → My Payslips**.

Bluesky Demo Pvt Ltd

DashboardSelf ServiceTeam AdmineHR Portal Management

Search...

RR

←

My Payslips

View and download your monthly payslips and annual income statements.

Payslips for Financial Year 2026-2027

Select a financial year to view the corresponding payslips.

Financial Year

₹ Income Statement

View and download your annual income statement for the selected financial year.

Financial Year

01-Apr-2026 To 31-Mar-2027

Show Statement

My Payslips

View a payslip

- 1 Choose the financial year**

Pick the year in **Financial Year** (for example *2026 - 2027*). Each month shows **Total Earned**, **Total Deduction** and **Net Pay**.
- 2 Open the month**

Select **View/Download** on the month you want.
- 3 Print or save**

The payslip shows your employee details, attendance (payable days, LOP, paid leaves), earnings, deductions and net pay in words. Select **Print** — choose *Save as PDF* in the print window to keep a copy.

Bluesky Demo Pvt Ltd

DashboardSelf ServiceTeam AdmineHR Portal Management

Q Search...RK

← View Payslip

Print

Bluesky Demo Pvt Ltd
Block 'C', Plot 16 (P), 17, 28 & 29 (P), SEZ, Andheri, Mumbai - 400100, MAHARASHTRA India

Payslip
Salary Statement for the Period from 01-Dec-2025 To 31-Dec-2025

Employee Details

Name : Richard Thomas Parker	LOP : 0	Employee Code : 5001
Group : INTELLIOB - MUMBAI	Weekly Offs : 6	PAN : ABCDE1234A
Department : HUMAN RESOURCES	Paid holidays : 0	EPF No. : --
Designation : DEPUTY GENERAL MANAGER	Month Days : 31	UAN No. : --
Type : Permanent	Payable Days : 31	ESIC No. : --
Work Location : MIDC		Date of Joining : 01-Apr-2023

Attendance				Earnings			Deductions	
Leave Balance:	OP.	CO.	CL.	Earnings	Payable	Earned	Deduction	Amount
Casual Leave	15	0	15	Basic	35000.00	35000.00	P.F.	1800.00

A monthly payslip

A month marked **Not Yet Published** hasn't been released by payroll yet.

Download your income statement

The income statement is your annual salary certificate: gross income, TDS deducted, your tax regime and a month-by-month breakdown — useful for tax filing and loan applications.

- 1

Choose the year
In the **Income Statement** card, pick the financial year.
- 2

Open it
Select **Show Statement**.
- 3

Download
Select **Download PDF**, or **Print**.

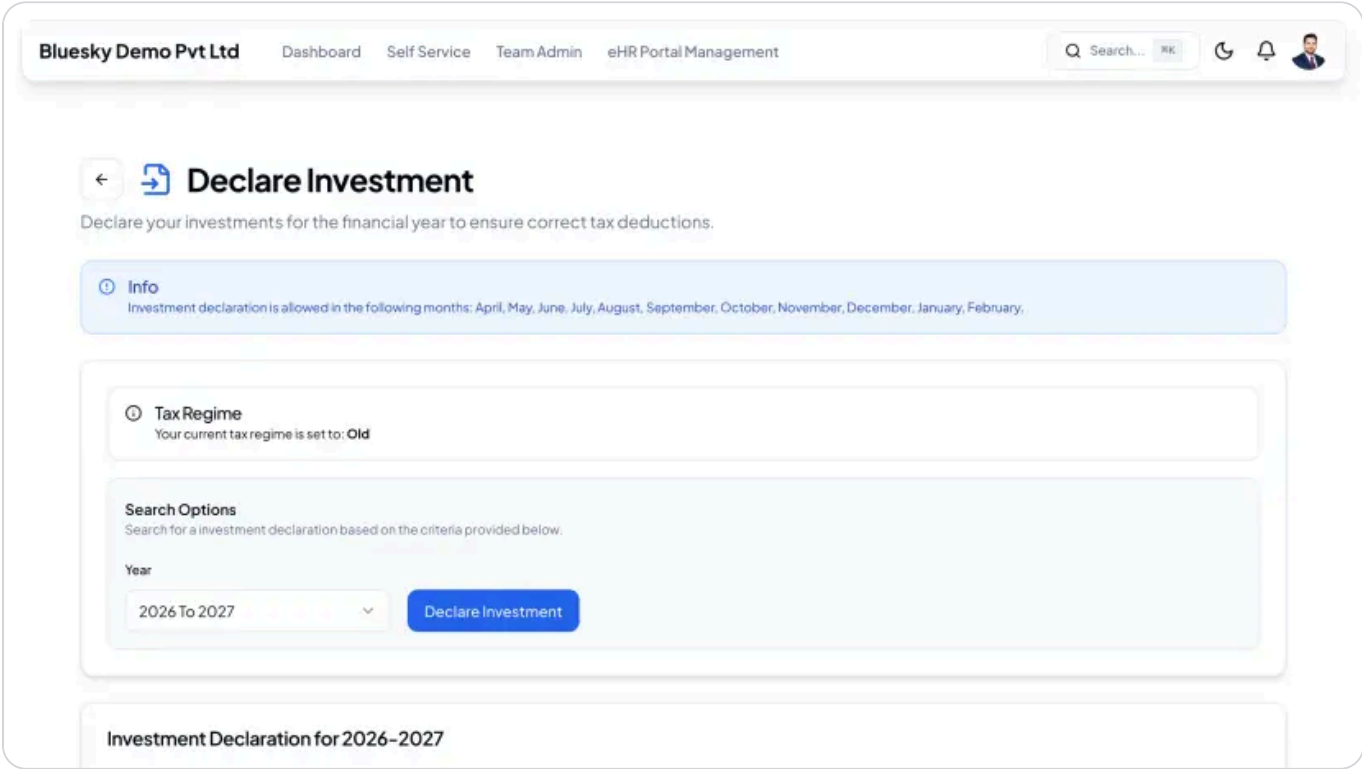
-  The income statement appears only if your company has enabled it. If you see *No income statement record found for this financial year*, payroll hasn't generated one for that year yet.

Declaring investments

Declare tax-saving investments and house rent for the financial year, attach proofs, and track approval.

Declare your tax-saving investments (for example under 80C or 80D) and the rent you pay, so payroll deducts the right amount of tax. Your declaration goes for approval, and payroll uses the **Considered** amount.

Open it from **Self Service → Declare Investment**.



Declare Investment

What you'll see

- **Info** — the months in which declarations are open (set by HR).
- **Tax Regime** — the regime you're on. Investment declaration only applies to the old regime; under the new regime you'll see **Not Applicable**.

- A status banner — **Pending Approval**, approved, or rejected with a request to review and resubmit.
- For each investment item: the **Declared Amount**, the **Considered Amount** (what was accepted) and any attached **Documents**.

How to declare

1 **Choose the financial year**
Pick the year, then select **Declare Investment**.

2 **Enter amounts**
Under **DECLARE INVESTMENTS**, enter the amount against each investment you've made.

3 **Attach proofs**
Select **Add Documents** under an investment to attach receipts or certificates.

4 **Declare house rent**
Under **HOUSE RENT PAID**, enter the rent for each month and select **Attach Rent Receipts**.

DECLARE INVESTMENTS

Deductions under section 80C

Maximum Exemption Limit is 1,50,000

Investment Item	Section	Declared	Considered
Life Insurance Certificate Add Documents	LIC	0	0
Provident Fund	PF	NA	0
Public Provident Fund Add Documents	PPF	0	0
National Savings Certificate Add Documents	NSC	0	0
Housing loan principal amount Add Documents	HL	0	0
Mutual Fund Add Documents	MF	0	0
Tuition Fees	TF	0	0

Entering amounts and attaching proofs

5 Save

Select **Save Investment Declaration**. You'll see **Investment declaration saved successfully**.

File rules

- Each file must be under **4 MB**.
- Allowed: images (JPEG, PNG, GIF, WebP, BMP) and documents (PDF, DOC, DOCX, XLS, XLSX, TXT, CSV).
- Every investment with an attached document needs an amount, and if you attach rent receipts you must enter rent for at least one month.



Declare at the start of the year with expected amounts so tax is spread evenly, then update with actual proofs before payroll's cut-off.

Applying for a loan

Apply for a company loan, track the application, and see a summary of your existing loans.

Open **Self Service → Loan Application** to apply for a loan from your employer and follow it through approval.

The screenshot shows the 'Loan Application' page within the 'Bluesky Demo Pvt Ltd' system. The top navigation bar includes 'Dashboard', 'Self Service', 'Team Admin', and 'eHR Portal Management'. A search bar and user profile icon are on the right. The page title is 'Self Service / Loan' and 'Loan Application'. Below the title, there are two tabs: 'Application Status' (active) and 'Loan Summary'. A text block explains that the 'Application Status' tab shows a detailed view of loan requests and allows deleting unapproved or rejected applications. A blue 'Apply for Loan' button is present. Below this is a 'Search Options' section with a subtext: 'Search for loan Application Status based on the criteria provided below.' It contains three filters: 'Loans' (dropdown set to 'All Loans'), 'Status' (dropdown set to 'All Status'), and 'Month' (calendar icon set to 'October 2026'). Below the filters is a table with columns: 'Loan', 'Date', 'Status', 'Duration', 'Applied Amount', and 'Sanctioned Amount'. The table is currently empty, with a message 'No applications found for the selected criteria.' at the bottom.

Loan Application

What you'll see

Two tabs:

- **Application Status** — every loan request you've made, with **Applied Amount**, **Sanctioned Amount** and status. Select one to see its **Loan Information**.
- **Loan Summary** — your existing loans and what's outstanding.

How to apply

1 Open the form

Select **Apply for Loan**.

2 Fill in the loan details

Choose the **Loan Type**, enter the amount, and set the repayment period in **Duration (Years)** and **Duration (Months)**. Add any remarks for your approver.

The screenshot shows a web application interface for 'Bluesky Demo Pvt Ltd'. The top navigation bar includes 'Dashboard', 'Self Service', 'Team Admin', and 'HR Portal Management'. The main content area is titled 'Self Service / Loan' and 'Loan Application'. A modal form titled 'Apply for Loan' is open, prompting the user to 'Fill out the form below to apply for a loan...'. The form contains the following fields: 'Loan Type' (a dropdown menu with 'Loan' selected), 'Amount' (a text input field with '0' entered), 'Duration (Years)' (a text input field with '1' entered) and 'Duration (Months)' (a text input field with '0' entered), and 'Remarks' (a text area with the placeholder 'Add any relevant remarks'). At the bottom of the form are two buttons: 'Cancel' and 'Submit Application' (which is highlighted in blue). The background shows a sidebar with 'Application Status' and 'Loan Summary' tabs, and a table with columns for 'Loan', 'Date', 'Status', 'Duration', 'Applied Amount', and 'Sanctioned Amount'. A message at the bottom of the table states 'No applications found for the selected criteria'.

Apply for Loan

3 Submit

Select **Submit Application**. You'll see **Loan application submitted successfully**.

The approver may sanction a different amount — check **Sanctioned Amount** once it's approved.

Delete an application

Only applications that are still **Pending** can be deleted. Select it, choose **Delete Application**, and confirm.

Use **Search Options (All Loans / All Status)** to filter a long list.

Applying for a salary advance

Apply for an advance against your salary, see the monthly deduction, and track approval.

A salary advance is paid now and recovered from your salary in monthly deductions. Open **Self Service → Advance Application**.

Bluesky Demo Pvt Ltd Dashboard Self Service Team Admin eHR Portal Management 🔍 Search... 🔄 🔔 👤

Self Service / Advance ← **Advance Application**

Application Status

Application Status shows you a detailed view of the application request made for all advances. You can also delete applications which are still not approved or rejected. For detailed information of your existing advances click 'Advance Summary' tab.

[Apply for Advance](#)

Search Options
Search for advance Application Status based on the criteria provided below.

Advance	Date	Status	Applied Amount	Sanctioned Amount	Duration	Monthly Deduction
No applications found for the selected criteria.						

Note: Only advances with application status 'Pending' can be deleted.

[Delete Application](#)

Advance Application

What you'll see

- **Application Status** — each request with **Applied Amount**, **Sanctioned Amount**, **Monthly Deduction** and status.
- **Advance Summary** — advances you've already received.

How to apply

- 1 Open the form**
Select **Apply for Advance**.
- 2 Fill in the details**
Choose the **Advance Type**, enter the amount and the repayment period in **Duration (Months)**, and add remarks.
- 3 Submit**
Select **Submit Application**. You'll see **Advance application submitted successfully**.

Once approved, the **Monthly Deduction** shows how much will be recovered from each salary.

Delete an application

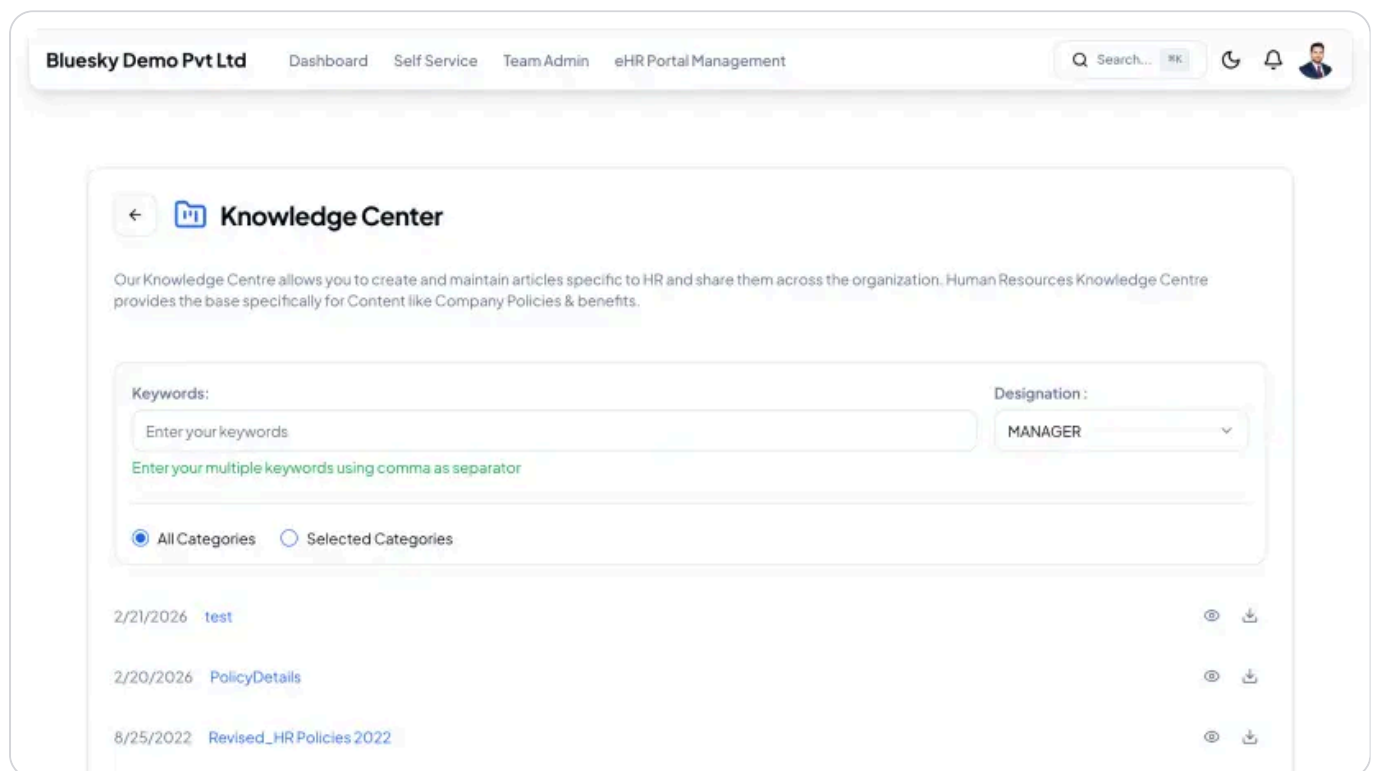
Only **Pending** applications can be deleted: select it, then **Delete Application**, and confirm.

Knowledge Center

Find and read company policies, handbooks and HR documents shared with you.

The **Knowledge Center** is your company's library — policies, benefits, handbooks and forms published by HR.

Open it from the Dashboard's **Knowledge Center** card (**View All Articles**), or search for *Knowledge Center*.



Knowledge Center

Find a document

1 Search by keyword

Type in **Keywords**. Separate several keywords with commas — for example *leave, travel*.

2 Narrow by category

Choose **All Categories** or pick specific categories.

3 Open it

Select the eye icon to preview a document in the browser, or the download icon to save it.

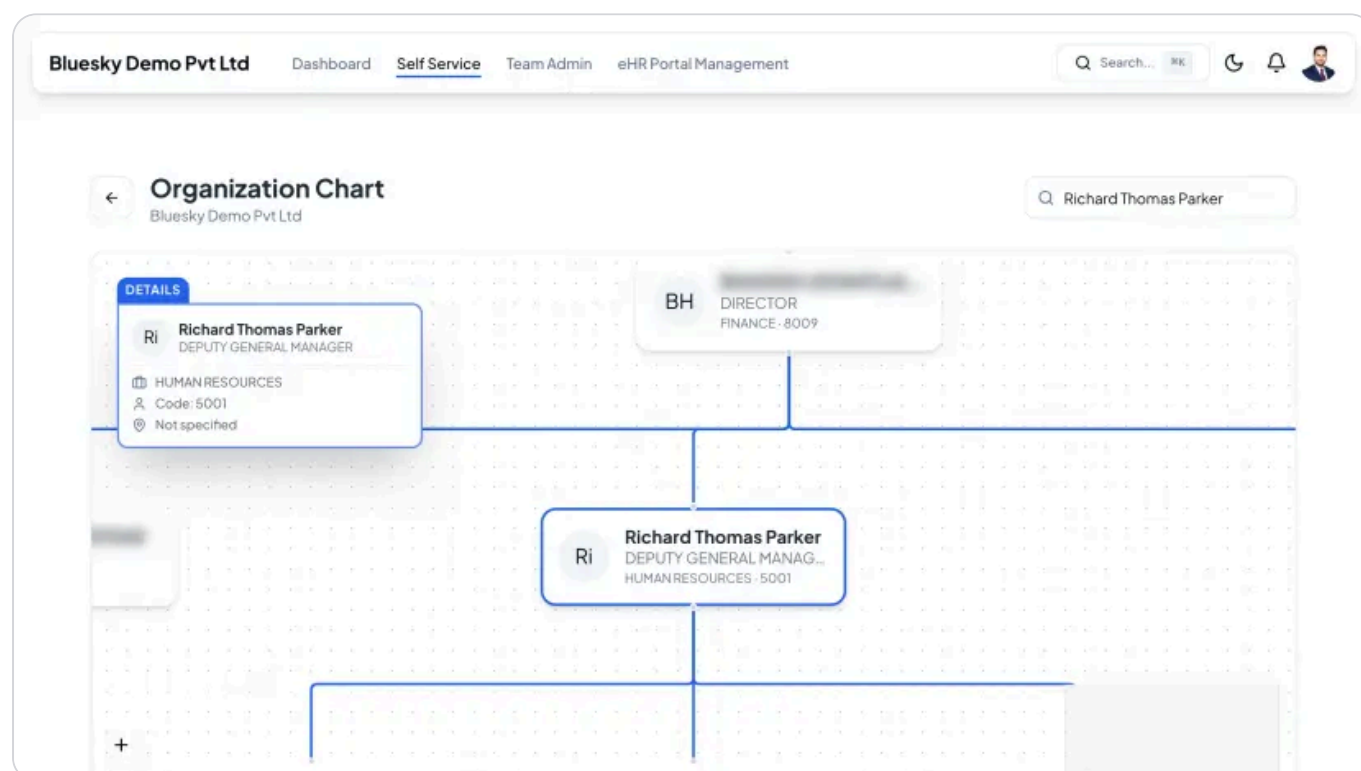
💡 If a PDF won't preview, select **Download File** and open it on your device.

Organisation chart

Browse your company's reporting structure and find anyone by name or employee code.

The **Organization Chart** shows who reports to whom across the company, including vacant positions.

Open it from **Self Service** → **View Organogram**.



Organization Chart

Using the chart

- Each box shows a person's name, designation, department and employee code. Vacant posts are marked **Vacant**.
- A **+N** badge under a box means N people report to that person. Select it to expand that branch — the chart zooms in on it.
- Drag to move around the chart, and use the zoom buttons or your mouse wheel to zoom.
- Use **Search by name or code** and pick the person from the list — the chart zooms to them, highlights their box and shows a **Details** card with their department, employee code and location.

 The chart is built from the reporting structure HR maintains. If your manager is shown wrongly, ask HR to update it.

FROM THE INTELLIOB SUITE · FREE TOOLS



Questions about your salary?

Work out your take-home pay, HRA exemption, PF and gratuity with Intelliob's free calculators — no sign-up needed.

[Try the free tools ↗](#)

Team Admin

Review your team, approve leave, timesheets and claims, and act for your associates.

For: Team Admin

Team Admin overview

Your team at a glance — today's attendance, each member's summary, and every request waiting for your approval.

Team Admin is for managers. It shows the people who report to you, their attendance today, and every request waiting for your decision. Open it from **Team Admin** in the top menu.

Bluesky Demo Pvt Ltd

DashboardSelf ServiceTeam AdmineHR Portal Management

Q Search... 3x11

Team Administration

Welcome Richard Thomas Parker, oversee your team's activities, approvals, and alerts.

My Team

Q Search Employee by Name or Role

WorkingSeparated

Employee Name	Attendance Today	Actions
Maya Mahesh Patel ASSISTANT MANAGER	Not Marked --:-- --:--	
Ashish Ramesh Singh JR-OFFICER	Not Marked --:-- --:--	
Rohit Ashish Yadav EXECUTIVE	Not Marked --:-- --:--	

Show: 5 entries

Team Alerts

Actionable insights and pending requests from your team.

11 Personal File Changes
Pending Requests

4 Outdoor Duty Approvals
Pending Requests

2 Timesheet Regularization
Pending Requests

2 Investment declarations
Pending Requests

1 Loan Applications
Pending Requests

Team Administration

What you'll see

Area	What it shows
My Team	Everyone reporting to you, with today's attendance (in-time → out-time, or Not Marked). Search by name or role, and switch between Working and Separated employees.
Employee Details	A summary of the selected team member: department, years in service, and this month's or year's leave, attendance, outdoor duty, loans, advances and investment declarations.
Team Alerts	One tile per approval queue with the number of Pending Requests — or All Clear . Select a tile to open that queue.

Act on a team member

Each row in **My Team** has three icons:

Icon (hover to see its name)	Opens
View Employee Profile	The member's profile.
View Leave Records	Their leave applications — see Team member records .
View Attendance	Their timesheet for any month.

Select a row (not an icon) to show that person in **Employee Details**.

Approval queues



Leave

Approve, reject or edit and approve leave.



Timesheets

Review timesheet corrections (regularization).

**Outdoor duty**

Approve work away from office.

**Personal file changes**

Profile edits and document uploads.

**Investment declarations**

Tax declarations and proofs.

**Loans and advances**

Sanction or reject applications.



Start each day from **Team Alerts**. Any tile with a number needs you; when every tile reads **All Clear**, you're done.



You see Team Admin only if HR has given you the Team Admin role. Who reports to you — and so whose requests you approve — is set by HR in the reporting structure and approval workflows.

Team member records

Open a team member's profile, leave records and monthly timesheet from My Team.

From **Team Admin** → **My Team**, use the icons on a member's row to look up their details.

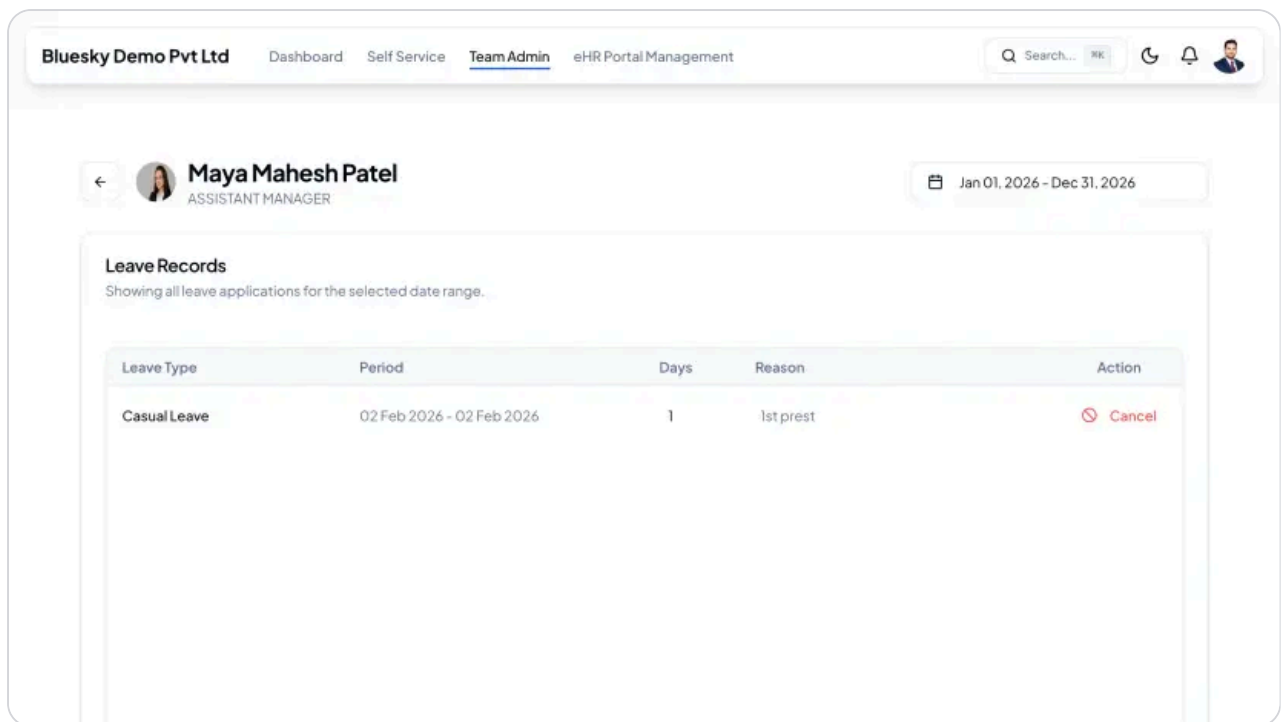
View a member's leave records

1**Open leave records**

In **My Team**, select **View Leave Records** (the document icon) on the member's row.

2**Choose a date range**

Use **Pick a date range** to set the period. **Leave Records** lists every application in that range with its **Leave Type**, dates and status.



A team member's leave records

Cancel a member's approved leave

If a member's approved leave needs to be withdrawn — for example they came to work after all — select the cancel option on that leave and confirm in **Cancel Approved Leave**. Choose **Keep Leave** to back out.

View a member's timesheet

1 Open the timesheet

Select **View Attendance** (the calendar icon) on the member's row.

2 Pick the month

Choose the month in **Select Month**. You see the same day-by-day view the employee sees, including declaration status.

3 Print

Use **Print Report** for a monthly attendance report.

Bluesky Demo Pvt Ltd

DashboardSelf ServiceTeam AdmineHR Portal Management

Search...

🔄🔔👤

←📄

View Timesheet

Select Month📅October 2026

🖨️Print Report🕒

Date	Shift	Status	In Time	Out Time	Total	OT Hours
01 - Thu, Oct	08:00-17:30	P	08:00 AM	05:30 PM	9h 30m	-
03 - Sat, Oct	08:00-17:30	P	08:00 AM	05:30 PM	9h 30m	-
05 - Mon, Oct	08:00-17:30	1/2P	08:00 AM	12:45 PM	4h 45m	-
06 - Tue, Oct	08:00-17:30	1/2P	12:45 PM	05:30 PM	4h 45m	-
07 - Wed, Oct	08:00-17:30	P	08:00 AM	05:30 PM	9h 30m	-

Viewing a team member's timesheet

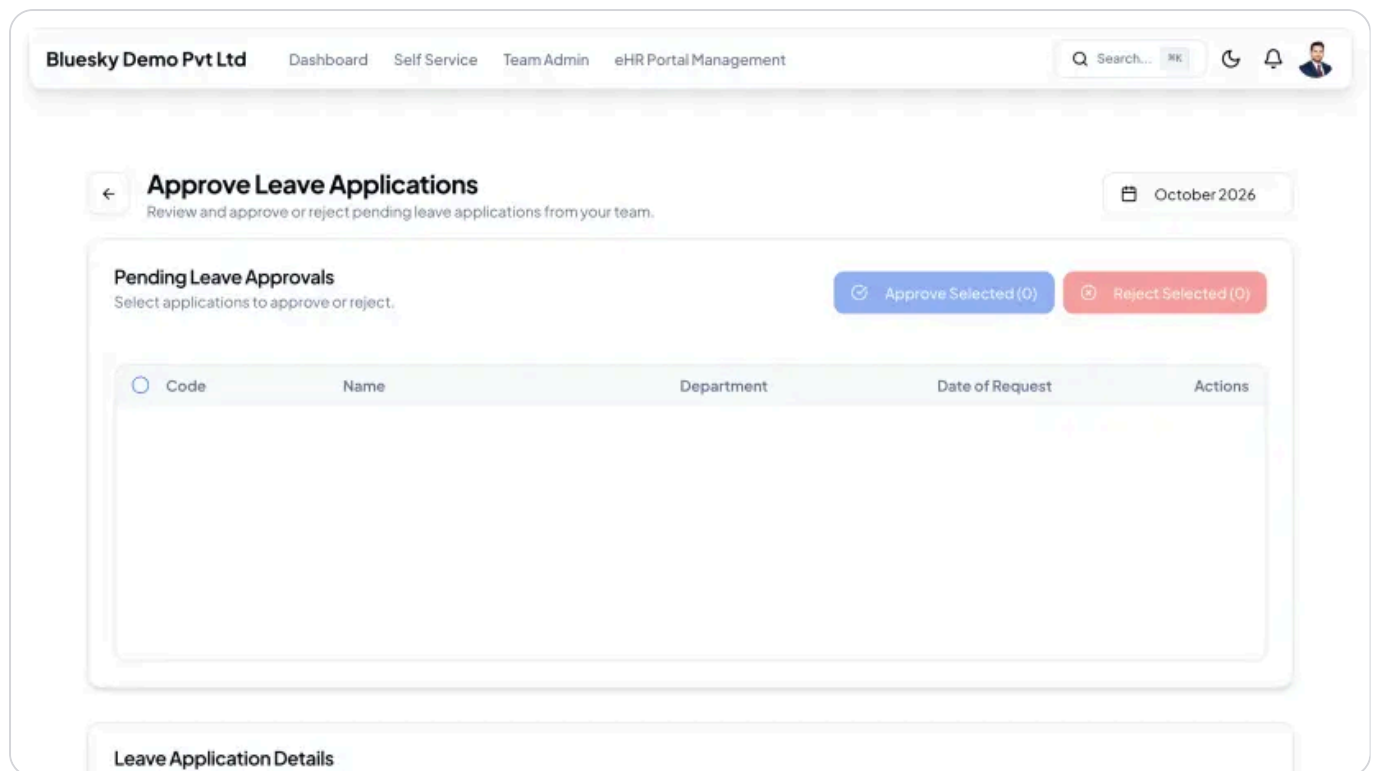
View a member's profile

Select **View Employee Profile** (the person icon) to open the member's profile — their personal and official details and approved documents. Profile information is read-only here; members update their own details from [My Profile](#), and the changes come to you in [Personal File Approvals](#).

Approving leave

Approve or reject your team's leave applications one at a time or in bulk, or adjust the dates before approving.

Open **Team Admin** → **Team Alerts** → **Leave Approvals**, or search for *Leave Approvals*.



Approve Leave Applications

What you'll see

- **Pending Leave Approvals** — every leave application waiting for you, with the employee, leave type, period and **Date of Request**.
- **Leave Application Details** — select an application to see the code, name, department, leave type, period, number of days, frequency and reason.

Approve or reject

1 Select the applications

Tick one or more applications.

2 Add a comment

A comment is required before you approve or reject — the employee sees it.

3 Approve or reject

Select **Approve Selected** or **Reject Selected**. You'll see **Action Complete** with the number processed.

You can also act on a single application with the approve (✓) or reject (✗) icon on its row.

Edit the dates, then approve

If you can approve only part of the request — say three days instead of five:

1 Open Edit & Approve

Select **Edit & Approve** on the application.

2 Adjust the dates

In **Edit & Approve Leave**, change the **Start Date** and **End Date**.

3 Approve

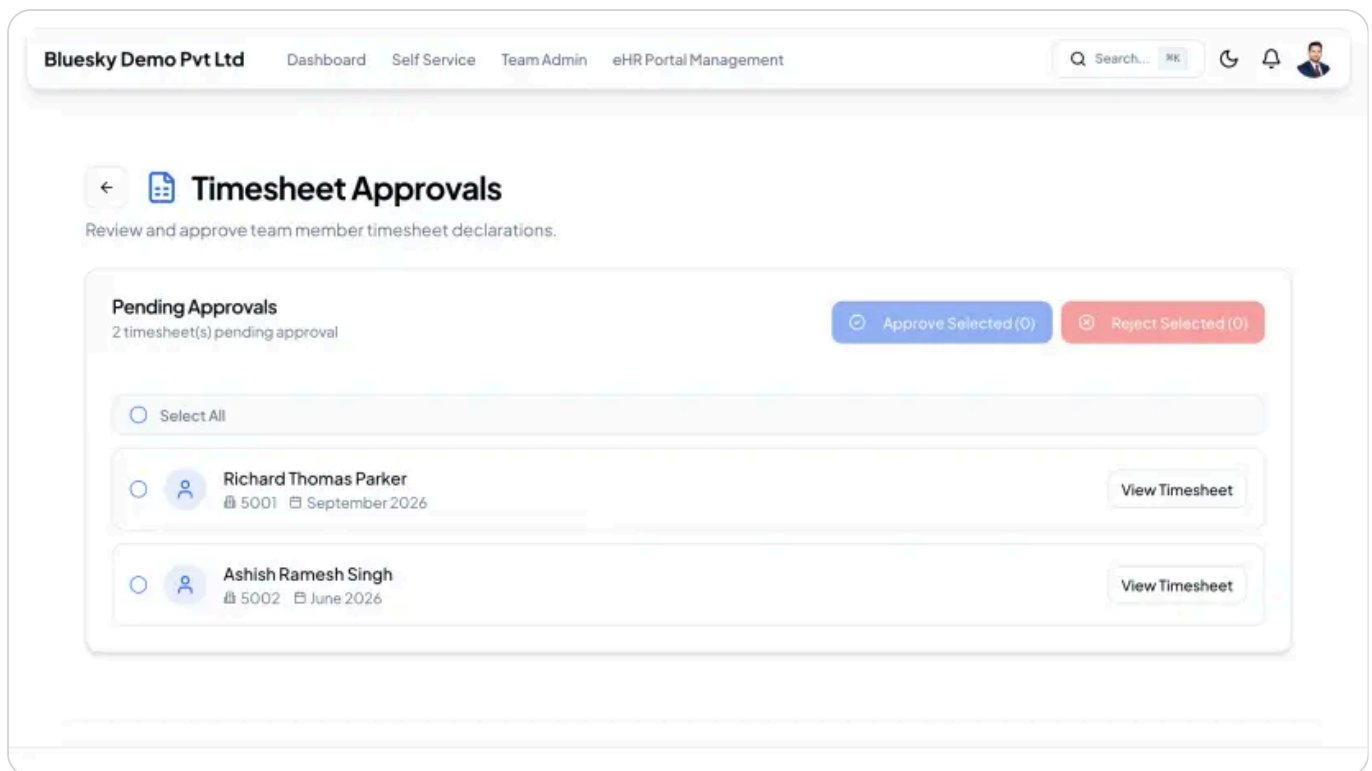
Add your comment and approve. The employee's balance is charged for the adjusted dates only.

 Select **Approver Information** to see who else is in the approval chain for that application.

Approving timesheet corrections

Review the timesheet changes your team has declared, compare them with the original punches, and approve or reject.

When a team member [declares a timesheet correction](#), it lands in **Timesheet Approvals** (shown as **Timesheet Regularization** in Team Alerts).



Timesheet Approvals

Review a declaration

- 1 Open the employee's declaration**

In **Pending Approvals**, select **View Timesheet** on the employee's row.
- 2 Compare the changes**

Each changed day shows the declared **In-Time** and **Out-Time** next to the timings **Before edit**, plus the **Employee Comments**.
- 3 Adjust if needed**

You can correct a declared entry before approving. Add **Admin Comments** for every entry you modify — the button then reads **Edit & Approve**.
- 4 Approve or reject**

Select **Approve** (or **Edit & Approve**), or **Reject**. You'll see **Timesheet approved successfully**. or **Timesheet rejected successfully**.

Approve several at once

Tick employees in **Pending Approvals** (or **Select All**) and use **Approve Selected** or **Reject Selected**. Use this only when you don't need to inspect each day.

Approved days update the employee's timesheet immediately and count for payroll. Rejected days keep their original attendance, and the employee can declare again.

Approving outdoor duty

Approve or reject your team's outdoor duty requests.

Open **Team Admin** → **Team Alerts** → **Outdoor Duty Approvals**.

Bluesky Demo Pvt Ltd

DashboardSelf ServiceTeam AdmineHR Portal Management

Search...RK

Approve Outdoor Duty

Review and approve or reject pending outdoor duty applications.

Pending Approvals

A list of all outdoor duty applications awaiting your approval.

Code	Name	Department	Date	Actions
5001	Richard Thomas Parker	HUMAN RESOURCES	22-Aug-2026	
5001	Richard Thomas Parker	HUMAN RESOURCES	25-Oct-2023	
5000	Maya Mahesh Patel	HUMAN RESOURCES	25-Oct-2023	
5000	Maya Mahesh Patel	HUMAN RESOURCES	23-Oct-2023	

Outdoor Duty Details:

Approve Outdoor Duty

- 1

Review the request

Select a request in **Pending Approvals** to see **Outdoor Duty Details** — date, day frequency, start and end time (for time-based duty) and the employee's remarks.

2 Approve or reject

Tick one or more requests and select **Approve** or **Reject**.

Approved outdoor duty is treated as a working day on the employee's timesheet.

Approving profile changes and documents

Review changes your team makes to their personal details and the documents they upload, field by field.

When a team member edits their profile or uploads a document, nothing changes until it's approved. Open **Team Admin** → **Team Alerts** → **Personal File Changes**.

Bluesky Demo Pvt Ltd

DashboardSelf ServiceTeam AdmineHR Portal Management

Q Search...RK





Personal File Approvals

Review and approve profile changes and document uploads for your team.

Personal Info (9)

Documents (1)

Employee	Component	Date Submitted	Actions		
Richard Thomas Parker 5001 • HUMAN RESOURCES	Previous Employer	05 Jun 2026, 06:38 PM	 View	 Approve	 Reject
Richard Thomas Parker 5001 • HUMAN RESOURCES	Previous Employer	05 Jun 2026, 06:38 PM	 View	 Approve	 Reject
Maya Mahesh Patel 5000 • HUMAN RESOURCES	Languages	20 Feb 2026, 02:46 PM	 View	 Approve	 Reject
Maya Mahesh Patel 5000 • HUMAN RESOURCES	Emergency Contacts	20 Feb 2026, 02:39 PM	 View	 Approve	 Reject

Personal File Approvals

The page has two tabs, each with a count: **Personal Info** for profile edits and **Documents** for uploads.

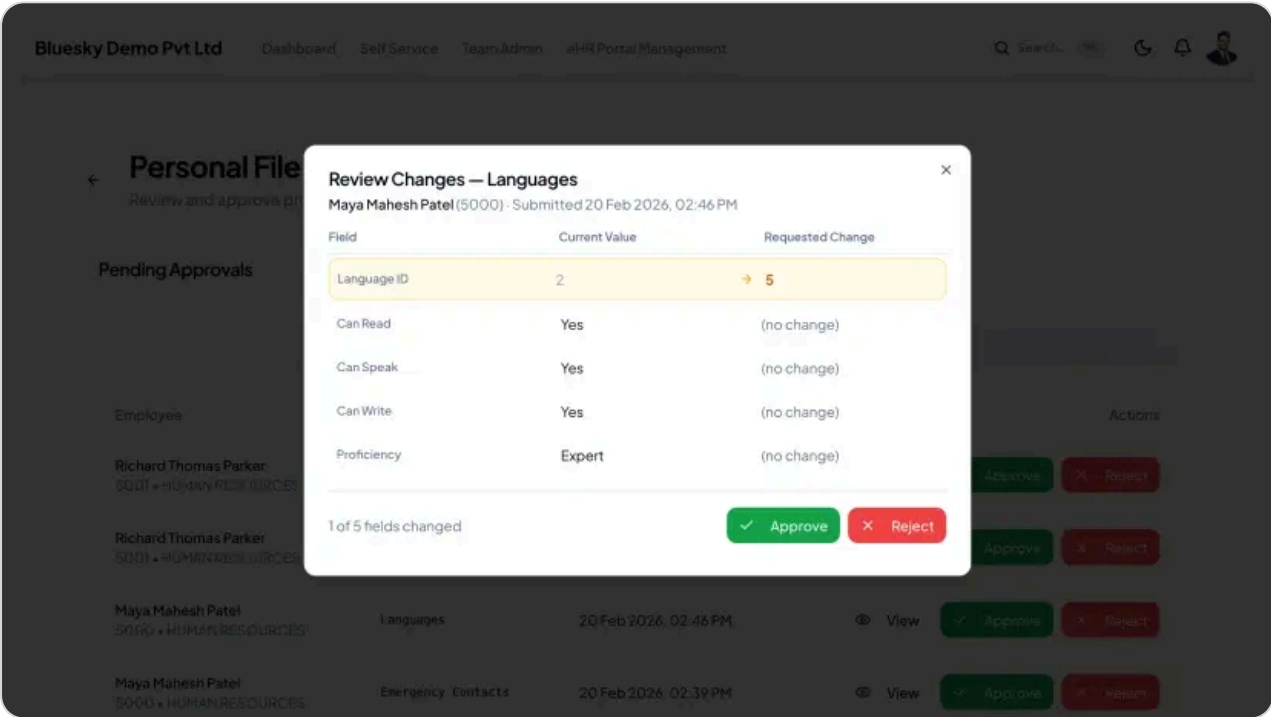
Approve a profile change

1 Open the request

On **Personal Info**, each row shows the **Employee**, the **Component** changed (for example *Emergency Contacts* or *Previous Employer*) and the **Date Submitted**. Select **View** to open **Review Changes**.

2 Compare old and new

Each changed field is listed with its **Current Value** and the **Requested Change**.



Reviewing a requested change

3 Approve or reject

Select **Approve** to update the employee's record, or **Reject** to discard the change. You can also approve or reject straight from the row without opening it.

Approve uploaded documents

1 Open the employee's documents

On **Documents**, select **View Documents** for the employee.

2 Check each file

Preview or download each document to check it.

3 Approve or reject

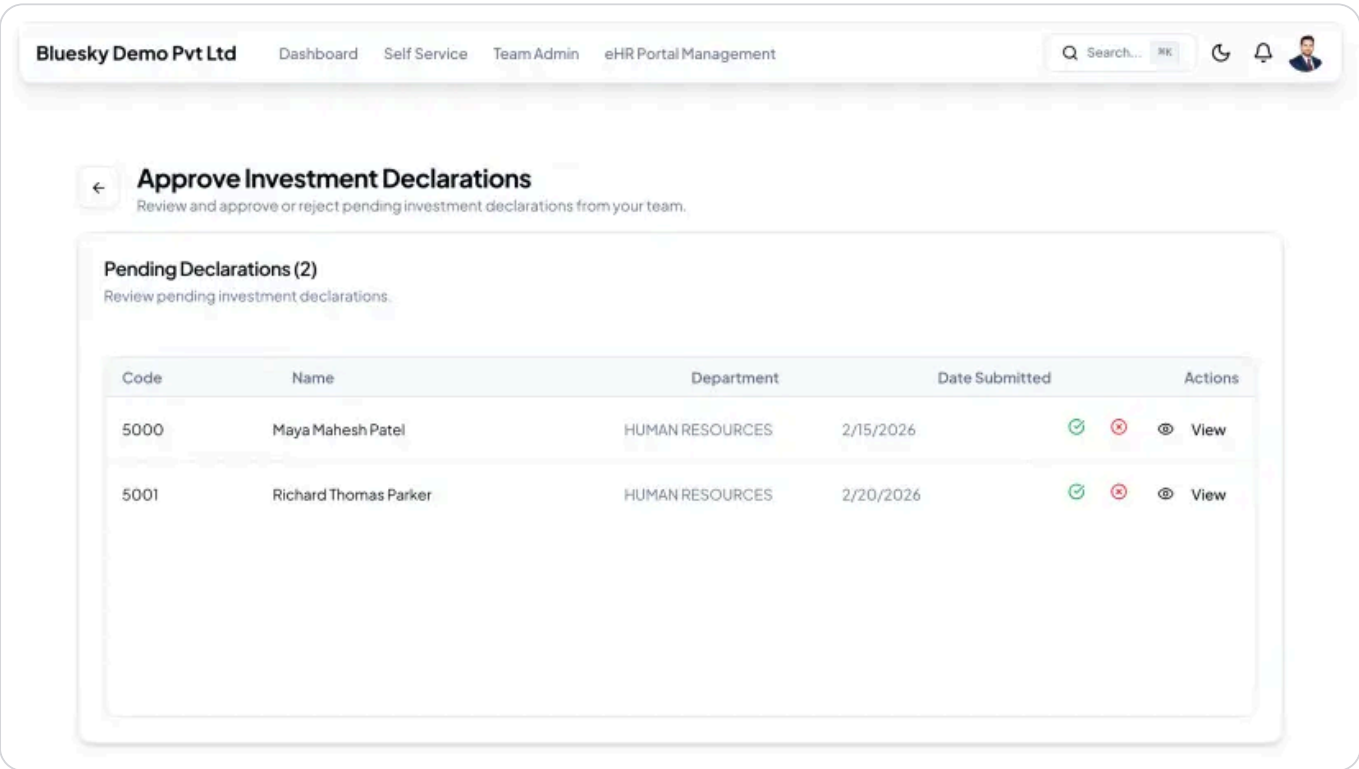
Approve or reject each document, or use **Approve All** / **Reject All**.

 Check sensitive fields — bank-related details, PAN, Aadhaar, addresses — against a supporting document before approving.

Approving investment declarations

Review your team's investment declarations and proofs, then approve or reject them.

Open **Team Admin** → **Team Alerts** → **Investment declarations**.



Approve Investment Declarations

The page has three tabs: pending declarations, **Approved** and **Rejected**.

1 Open a declaration

Select the employee's declaration in the pending list.

2 Check amounts and proofs

Review each investment's declared amount and download the attached documents and rent receipts.

3 Approve or reject

Add your **Approver Comments**, then select **Approve** or **Reject**. The employee sees the result on their [Declare Investment](#) page, and a rejected declaration can be corrected and resubmitted.

Approving loans and salary advances

Approve, reject or change the sanctioned amount and duration of loan and salary advance applications.

Loan and salary advance applications work the same way. Open **Team Admin** → **Team Alerts** → **Loan Applications** or **Salary Advance Applications**.

Bluesky Demo Pvt Ltd

DashboardSelf ServiceTeam AdmineHR Portal Management

Q Search...NR

←

Approve Loan Applications
Review and approve or reject pending loan applications from your team.

Pending Loan Approvals

Code	Name	Department	Date of Request
5001	Richard Thomas Parker	HUMAN RESOURCES	19-Mar-2026
5001	Richard Thomas Parker	HUMAN RESOURCES	19-Mar-2026
5005	Rohit Ashish Yadav	HUMAN RESOURCES	28-Feb-2026

Application Details:
5001, Richard Thomas Parker, 19-Mar-2026

Edit & Approve

Approve Loan Applications

Approve or reject as requested

1 Review the application

Select it in the list to see **Application Details** below — amount requested, duration, (for advances) the monthly deduction, and the reason.

2 Add a comment

A comment is required — it's sent to the employee.

3 Approve or reject

Select the approve (✓) or reject (✗) button next to **Edit & Approve**. You'll see **Application approved successfully**, or **Application rejected successfully**.

Sanction a different amount

1 Open Edit & Approve

Select **Edit & Approve** on the application.

2 Change the terms

Set the **Sanction Amount** and the duration — **Duration (Years)** and **Duration (Months)** for a loan, or **Duration (Months)** and **Monthly Deduction** for an advance.

The screenshot shows a web application interface for 'Bluesky Demo Pvt Ltd'. The top navigation bar includes 'Dashboard', 'Self Service', 'Team Admin', and 'eHR Portal Management'. A search bar and user profile icon are on the right. The main content area is titled 'Approve Loan Application' with a subtitle 'Review and Approve or Reject Loan Request'. Below this is a table of 'Pending Loan Approvals' with columns for 'Code', 'Name', and 'Date of Request'. The table lists three entries for Richard Thomas Parker and one for Ronit Ashish. A modal window titled 'Edit & Approve Loan' is open, showing a form to adjust the sanctioned amount and repayment terms for Richard Thomas Parker. The form includes fields for 'Sanction Amount' (1000), 'Duration (Years)' (1), and 'Duration (Months)' (6). A 'Comments' section has a placeholder text 'Approval comments are mandatory'. At the bottom of the modal are 'Cancel' and 'Update & Approve' buttons. The background shows the 'Application Details' for the selected entry: '5001, Richard Thomas Parker, 19-Mar-2026'.

Code	Name	Date of Request
5001	Richard Thomas Parker	19-Mar-2026
5001	Richard Thomas Parker	19-Mar-2026
5005	Ronit Ashish	28-Feb-2026

Application Details:
5001, Richard Thomas Parker, 19-Mar-2026

Edit & Approve Loan

3 Approve

Add your **Comments** (they're mandatory) and select **Update & Approve**. You'll see **Application** has been updated and approved.

The employee sees the **Sanctioned Amount** on their [Loan](#) or [Salary Advance](#) page.

FROM THE INTELLIOB SUITE · PAYCARE

Approved here, paid right



PayCare runs payroll and statutory compliance — PF, ESIC, PT, TDS and Form 16 — and integrates with Accord eHR's leave and attendance.

[Explore PayCare](#)

eHR Portal Management

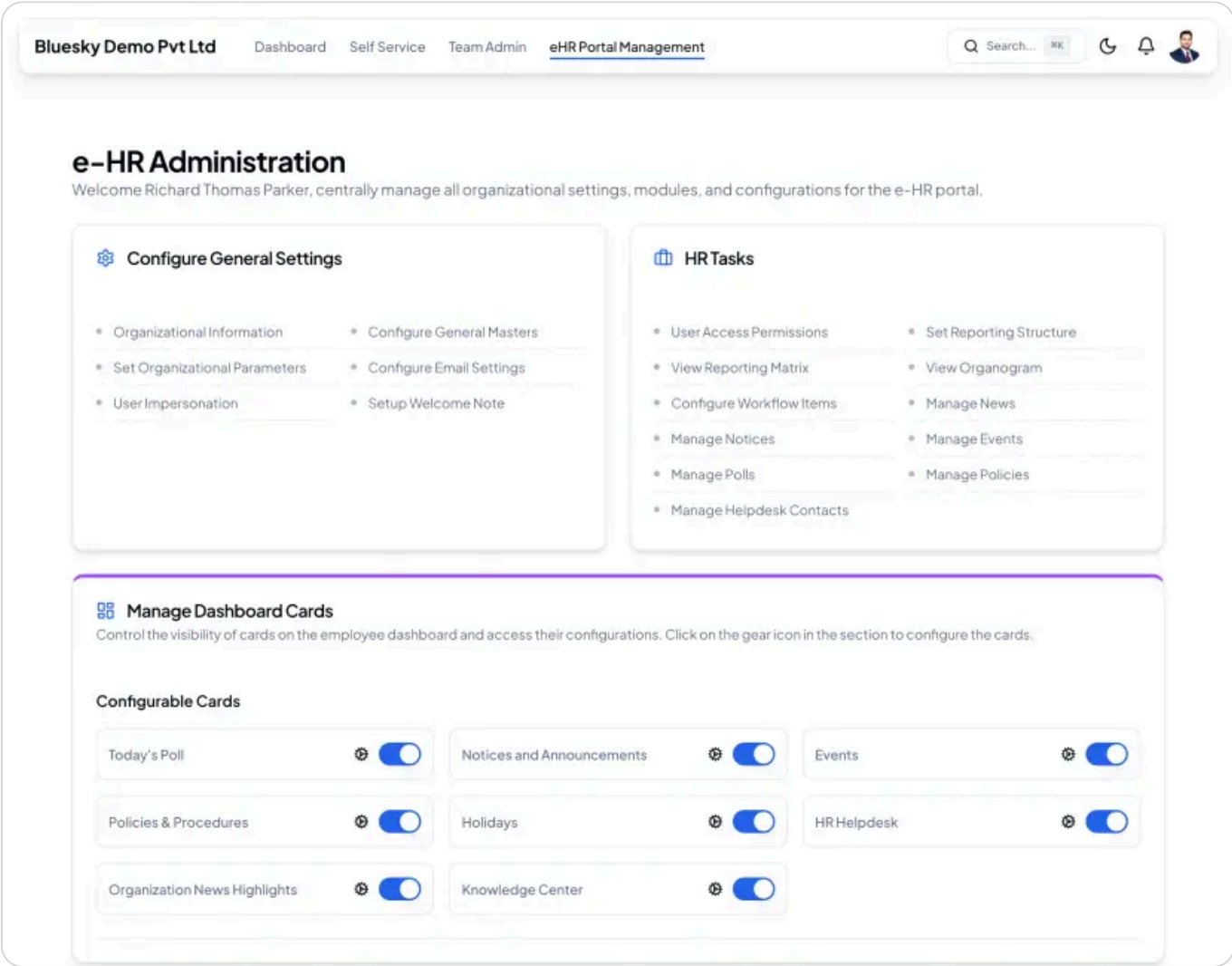
Configure the portal: access rights, workflows, masters, dashboard content and policies.

For: HR Administrator

eHR Portal Management overview

The HR administrator's control panel — access rights, approval workflows, organisation setup, and the content employees see.

eHR Portal Management (the *e-HR Administration* page) is where HR configures Accord eHR for the whole organisation. Open it from **eHR Portal Management** in the top menu.



e-HR Administration

What's on this page

Card	What it's for
Configure General Settings	Company information, masters, organisational parameters, email, user impersonation and the dashboard welcome note.
HR Tasks	User access permissions, reporting matrix, organogram, approval workflows, and the news, notices, events, polls, policies and helpdesk contacts employees see.
Manage Dashboard Cards	Switch dashboard cards on or off, and open each card's settings with the gear icon.
Manage Self Service Sections	Switch Self Service modules on or off for everyone.

Guides in this section

Access and approvals



User Access Permissions

Who is a Team Admin or HR administrator.



Approval workflows

Who approves each request, and when it escalates.



Reporting matrix

See who reports to whom.



User Impersonation

See the portal exactly as an employee does.

Organisation setup



Organizational Information

Company details and logo.



General masters

Locations, departments, designations, pay cycle date and more.



Organizational parameters

Payslip formats, investment windows, profile access, auto-approvals.



Email settings

The mail server Accord sends notifications through.



Welcome note

Dashboard banner and greeting.

What employees see



Dashboard cards

Choose the cards on everyone's dashboard.



Self Service sections

Turn modules like Loan or Outdoor Duty on or off.



Notices, news and events

Publish company updates.



Polls, policies and helpdesk

Run polls, publish policies, list helpdesk contacts.



Changes here apply to everyone in your organisation as soon as you save. Make configuration changes outside busy periods such as month-end payroll.

User access permissions

Make employees Team Admins or HR administrators, and fine-tune which admin pages each one can use.

Every employee can use the Dashboard and Self Service. **User Access Permissions** controls who also gets **Team Admin** (managers) and **eHR Portal Management** (HR).

Open **eHR Portal Management** → **HR Tasks** → **User Access Permissions**.

The screenshot shows the 'User Access Permissions' page in the Bluesky Demo Pvt Ltd system. The page has a navigation bar with 'Dashboard', 'Self Service', 'Team Admin', and 'eHR Portal Management'. The 'eHR Portal Management' section is active. Below the navigation bar, there is a search bar and a designation dropdown. The search bar contains the text 'Search by name or login...'. The designation dropdown is set to 'All Designations'. Below the search bar, there is a blue box with the text 'Only users with assigned permissions will be listed in the "Configure Workflow" Section.' Below this, there is a table with the following columns: 'Employee', 'Designation', 'Team Admin', and 'eHR Portal'. The table shows one employee, 'Liam James Smith', with the designation 'MANAGING DIRECTOR'. The 'Team Admin' and 'eHR Portal' columns for this employee have blue checkmarks. The table also shows 'Rows per page' set to 20 and '1-20 of 1534' records. A 'Save' button is visible in the top right corner of the table area.

Employee	Designation	Team Admin	eHR Portal
Liam James Smith	MANAGING DIRECTOR	☒	☒

User Access Permissions

Give or remove access

1 Find the employee

Search by name or login, or filter by designation (**All Designations**).

2 Tick the access they need

Tick **Team Admin** to let them review their team and approve requests, and **eHR Portal** to let them use eHR Portal Management. Untick to remove access.

3 Save

Select **Save** (above the table) or **Save Changes** (below it). You'll see how many employees were updated.

The employee sees the new menu items the next time they sign in.

💡 Only users with permissions assigned here can be picked as approvers in [approval workflows](#). Give someone Team Admin before adding them as an approver.

Approval workflows

Decide who approves each type of request, how many levels it goes through, and when it escalates or auto-rejects.

Each request type — leave, timesheet, outdoor duty, loan, advance, investment declaration, profile changes and more — has a **workflow** that decides who approves it. Open **eHR Portal Management** → **HR Tasks** → **Configure Workflow Items**.

The screenshot displays the 'Configure Workflow Items' page within the 'eHR Portal Management' section of the 'Bluesky Demo Pvt Ltd' system. The page includes a search bar and a table of workflow items.

Search & Filter
Search for specific workflow items by name.
Search by function name...

Manage Self Service Sections

Function	Approving Authority	Finalized By	Level	Escalation After	AutoRejection After	Action
Leave Request	Business Line Manager	Every One	1	7 days	-	
Investment Declaration	Functional Manager	Any One	2	-	-	

Configure Workflow Items

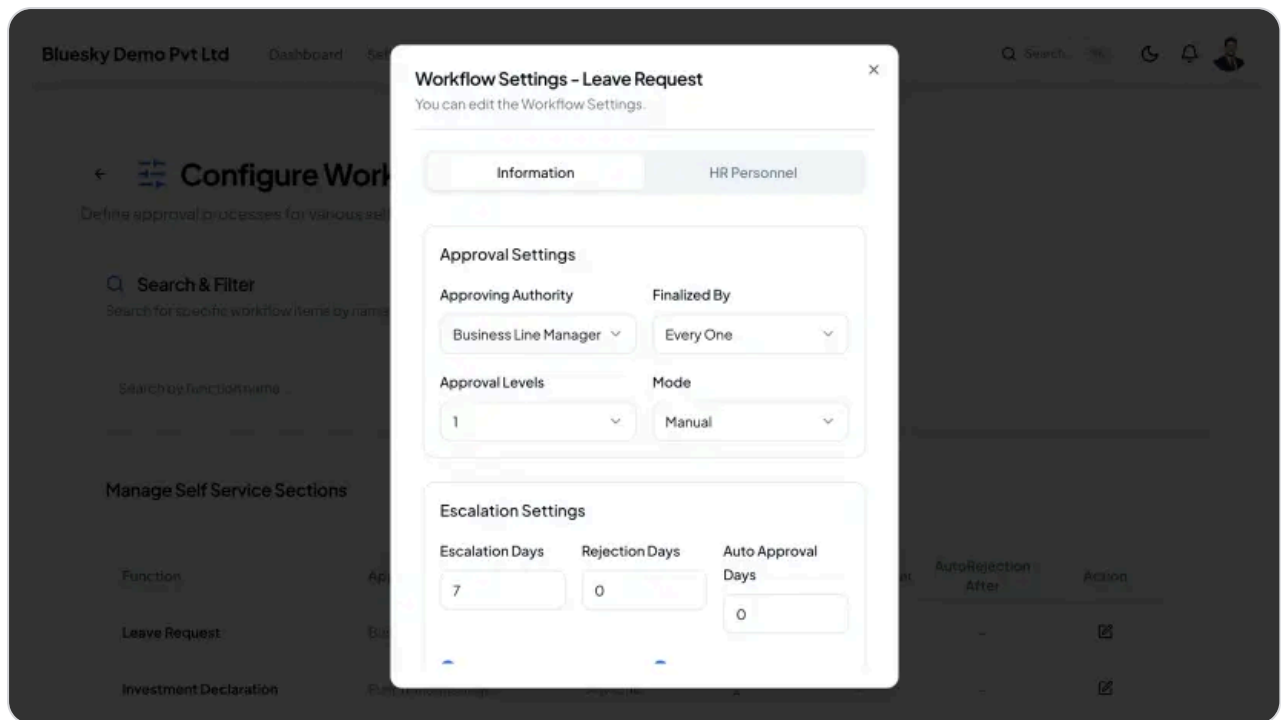
Read the list

Column	Meaning
Function	The request type, for example <i>Leave Request</i> or <i>Loan Request</i> .
Approving Authority	Who approves, based on the reporting structure — for example <i>Business Line Manager</i> or <i>Functional Manager</i> .
Finalized By	Whether Any One approver or Every One must approve.
Level	How many approval levels the request passes through.
Escalation After	Days before an unanswered request escalates.
AutoRejection After	Days before an unanswered request is rejected automatically.

Use **Search & Filter** to find a function by name.

Change a workflow

- 1 Open the workflow**
Select the edit icon in the **Action** column.
- 2 Set the approval rules**
On **Information**, under **Approval Settings**, choose the **Approving Authority**, **Finalized By**, **Approval Levels** and **Mode** (**Manual**, or **Auto** to approve automatically).
- 3 Set escalation**
Under **Escalation Settings**, set **Escalation Days**, **Rejection Days** and **Auto Approval Days**, and choose whether to **Notify Escalation To HR** and **Notify Approval To HR**.



Editing a workflow

4 Save

Select **Save Changes**.

Name specific approvers

By default approvers come from the reporting structure. When **Approving Authority** is **Functional Manager**, an **Approvers** tab appears: select **Add Approvers**, pick the employees and their **Approver Level**, and save. Specific approvers override the role-based authority for that workflow.

Add HR personnel for notifications

On the **HR Personnel** tab, select **Add HR Personnel** and search for employees (type at least 2 characters). They receive notifications and escalations for that workflow.



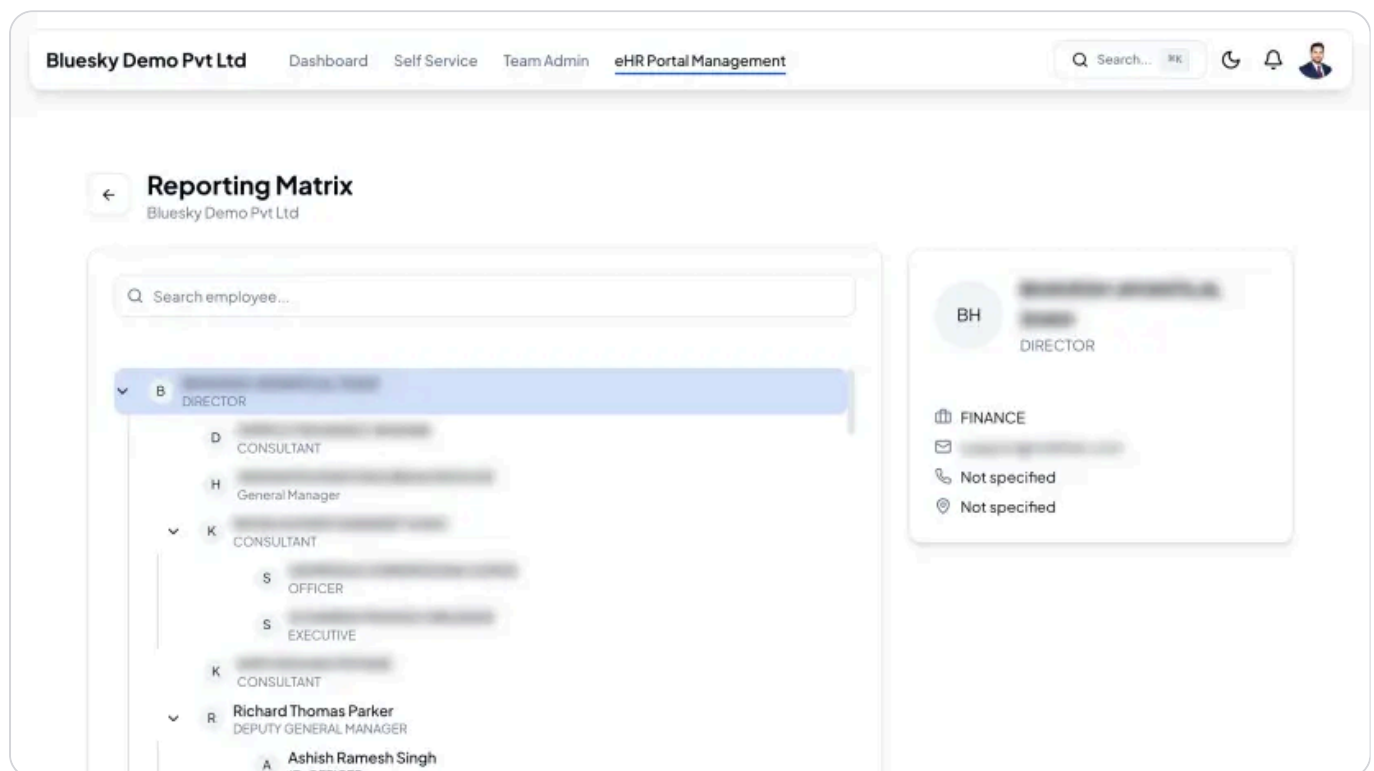
Set **Escalation After** on time-sensitive workflows such as Leave Request and Timesheet, so requests don't sit unanswered when a manager is away.

Reporting matrix and organogram

See the reporting structure that drives approvals, as a searchable list or an organisation chart.

The reporting structure decides who approves whose requests. HR can view it two ways from **eHR Portal Management** → **HR Tasks**:

- **View Reporting Matrix** — a searchable list of employees and who they report to.
- **View Organogram** — the same structure as a chart. See [Organisation chart](#).



Reporting Matrix

Using the reporting matrix

- Use **Search employee...** to find someone.
- Select an employee to see their details and reporting line.

i If a request goes to the wrong approver, check the employee's reporting line here first, then the [approval workflow](#) for that request type.

User impersonation

Sign in as an employee to see the portal exactly as they do — useful for support and troubleshooting.

When an employee reports a problem ("I can't see the Loan card", "my approver is wrong"), **User Impersonation** lets you sign in as them and see exactly what they see. Your own session is saved and restored when you finish.

Open **eHR Portal Management** → **Configure General Settings** → **User Impersonation**.

The screenshot shows the 'User Impersonation' page within the 'Bluesky Demo Pvt Ltd' system. The top navigation bar includes 'Dashboard', 'Self Service', 'Team Admin', and 'eHR Portal Management'. The main heading is 'User Impersonation' with a subtext 'Search for a user and sign in to their account.' Below this, a modal box titled 'Confirm it's you' prompts the user to re-enter their account password to continue. The modal includes a password input field labeled 'Enter your account password' and a 'CONTINUE' button. A note at the bottom of the modal states: 'This is the same password you use to sign in. [Forgot your password?](#)'

User Impersonation

Sign in as an employee

1

Confirm it's you

Re-enter your own account password and select **CONTINUE**.

2

Find the employee

Under **Search Options**, search by name or login and choose a **Status** filter (**All**, **Active** or **Inactive**).

3 Sign in as them

Select **Sign in as user** on their row, then confirm in **Sign in as this user?**

A banner reads **You are impersonating** *name* for as long as you're signed in as them.

Stop impersonating

Select **Exit Impersonation** in the banner. You're returned to your own account.



Anything you do while impersonating — applying for leave, approving a request, editing a profile — is done as that employee. Use impersonation to look, not to act on someone's behalf.



If you see *User impersonation is not configured on this server*, contact Intelliob support to enable it.

Organizational information

Keep your company's name, address, contact details and logo up to date.

Organizational Information holds your company's general details and the logo shown in the portal header. Open **eHR Portal Management** → **Configure General Settings** → **Organizational Information**.

Bluesky Demo Pvt Ltd Dashboard Self Service Team Admin eHR Portal Management Search... [Refresh] [Bell] [User Profile]

← Organizational Information

View and manage your company's general information and branding.

General Details

View the name of your company and general information about this organization as well as communication details. Edit

Address	Block 'C', Plot 16, sez, Andheri, Mumbai, 0		
State	MAHARASHTRA	Country	India
Phone 1		Email	
Phone 2	-	Website	https://intelliob.com

Organizational Information

Update company details

1 Edit

In **General Details**, select edit to open **Edit Organizational Information**.

2 Update the fields

Change the **Company Name**, address, phone numbers, email or website as needed.

3 Save

Save the form, then select **Save Changes** on the page. You'll see *Organizational information has been saved*.

i If you leave the page with edits not yet saved, you'll see **Unsaved Changes** — go back and select **Save Changes**.

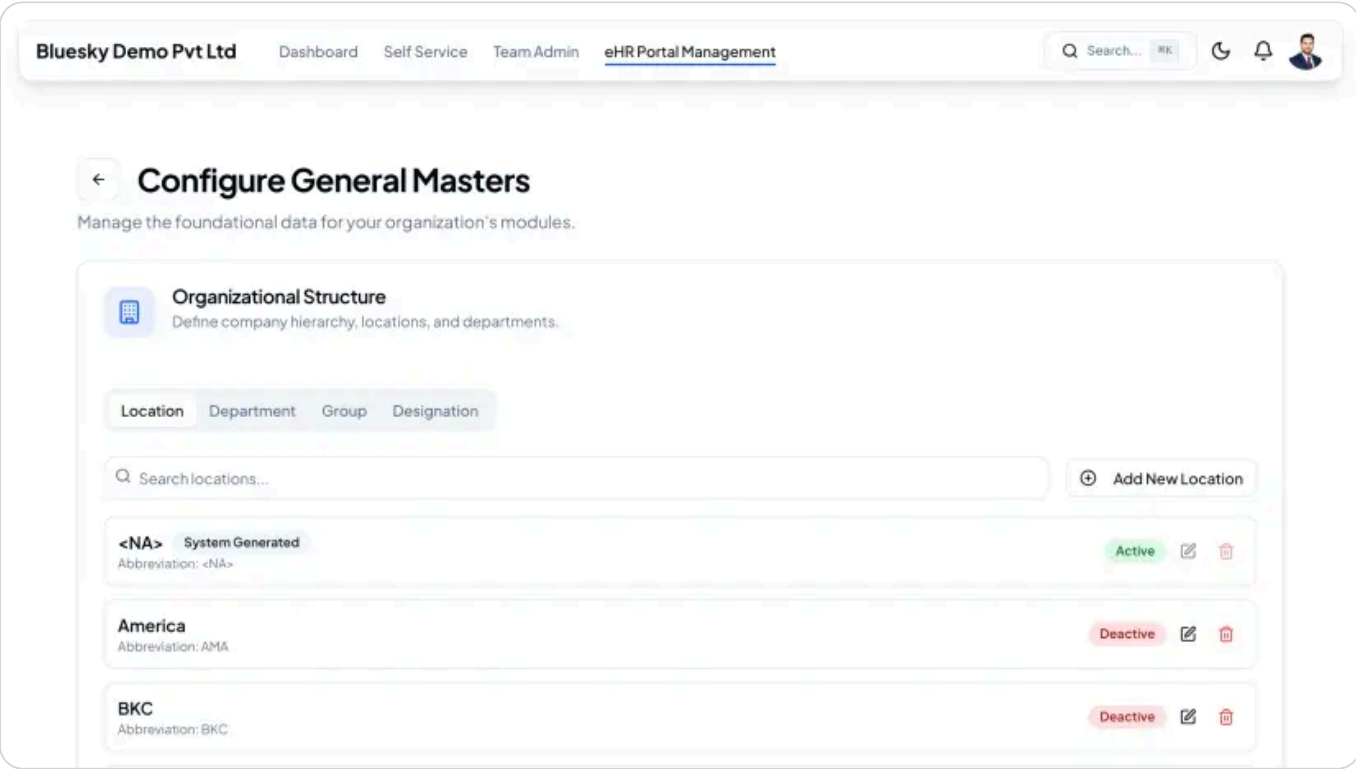
Change the company logo

Under **Company Logo**, select **Add / Change** and choose an image. If no logo is set, Accord shows a default one.

General masters

Maintain the lists the rest of Accord uses — locations, departments, groups, designations, religions, languages, Knowledge Center categories — and the pay cycle date.

Configure General Masters holds the reference lists that appear in drop-downs across Accord. Open **eHR Portal Management → Configure General Settings → Configure General Masters**.



Configure General Masters

The masters

Tab	What it holds
Location	Offices and work locations.
Department	Departments, each belonging to a group.
Group	Groups of departments or business units.
Designation	Job titles.
Pay Cycle	The day of the month employees are paid.
Religion · Language	Options employees pick from in My Profile.
Knowledge Bank Category	Categories for Knowledge Center documents.
Helpdesk Contacts	See helpdesk contacts .

Add an entry

1 Open the tab

Select the master you want — for example **Designation**.

2 Add

Select the add button (for example **Add New Designation**), enter the name and short code, and save.

Use the search box on each tab to find an entry, and the delete icon to remove one (you'll be asked **Are you sure?**). For **Department**, pick the group it belongs to; use **Filter by group** to narrow the list.



Don't delete an entry that's still assigned to employees — for example a department people work in. Reassign them first.

Set the pay cycle date

On **Pay Cycle**, choose the **Day of the Month** and select **Save Date**. This date drives the [Pay Cycle card](#) on everyone's dashboard.

Organizational parameters

Company-wide rules — reporting structure mode, investment declaration windows, payslip formats, profile editing, team lists, module access, automatic approvals and miscellaneous settings.

Set Organizational Parameters holds the rules that shape how Accord behaves for everyone. Open **eHR Portal Management → Configure General Settings → Set Organizational Parameters**.

The screenshot displays the 'Set Organizational Parameters' interface. At the top, the navigation bar includes 'Bluesky Demo Pvt Ltd', 'Dashboard', 'Self Service', 'Team Admin', and 'eHR Portal Management'. A search bar and user profile icon are also present. The main heading is 'Set Organizational Parameters' with a subtext: 'Configure high-level settings and options for your organization.' Below this, there are four expandable sections:

- Reporting Structure**: Define how the reporting hierarchy is managed. Select 'Common' to maintain one reporting structure across all companies, or 'Company Specific' to define it individually. The 'Reporting Structure' dropdown is currently set to 'Common', and a 'Save Reporting Structure' button is visible.
- Investment Options**: Configure when users can submit or update investment details.
- Set Payslip Formats**: Manage reporting and payslip formats.
- Personal File Access**: Define which heads will be available for updation in My Profile.

Set Organizational Parameters

Each section has its own save button — save one section before moving to the next.

Section	What you set	Save with
Reporting Structure	Common (one reporting structure across all companies) or Company Specific .	Save Reporting Structure
Investment Options	The months in which employees can submit assumed (projected) investments, until when they're considered, and from when actual declarations apply.	Save Investment Options
Set Payslip Formats	Which payslip views employees get — for example Compact (Year-To-Date) and Income Statement — and whether the compact payslip shows abbreviations.	Save Report Options
Personal File Access	Which My Profile sections employees can edit, and whether team leads can see team members' salary structure.	Save Personal File Access
Knowledge Center Policies	How many recent documents appear in Recent Documents.	Save Knowledge Center Policies
Team List Options	Which team-list views are available (Regularize Attendance, Mark Leave, Leave History, Team List Report).	Save Team List Options
Module Access	Which modules all users can access.	Save Module Access
Automatic Approvals	Request types that are approved automatically, without a manager.	Save Auto Approvals



Automatic approval skips managers entirely for that request type. Use it only for low-risk requests.

Miscellaneous settings

Under **Other Configurations**, select **Miscellaneous Settings** for finer rules, including:

- Show the half-day option on leave requests.
- Allow back-dated leave from Self Service, per leave type (after approval only leave balances change; payslips are not affected).

- Make timesheet comments mandatory.
- Leave combination rules — for example *Cannot apply Casual Leave with Sick Leave*.
- Allow sick leave for future dates; hide the leave cancel option.
- Time-based outdoor duty.
- **Show All Team Attendance** or **Show Team Members Attendance** for managers.
- **Maximum advance in a year** and **Maximum Installment month's for Advance**.
- Compensatory off restrictions.

Select **Save Settings** when you're done.

Email settings

Configure the mail server (SMTP) Accord uses to send notification emails such as approvals and password reset codes.

Accord sends emails — approval requests, approval results, escalations and password-reset codes — through your organisation's mail server. Open **eHR Portal Management → Configure General Settings → Configure Email Settings**.

The screenshot displays the 'Configure Email Settings' interface within the 'eHR Portal Management' section of the 'Bluesky Demo Pvt Ltd' system. The page title is 'Configure Email Settings' with a subtitle 'Manage email notification settings for the organization.' The main content area is titled 'Notification SMTP Settings' and includes the instruction 'Configure SMTP settings for sending e-mail notification alerts.' The settings are organized into two columns: 'Server Information' and 'Logon Information'. The 'Server Information' column contains fields for 'Outgoing mail server (SMTP)', 'Outgoing mail server Port (SMTP)', and an 'Enable SSL' checkbox. The 'Logon Information' column contains fields for 'E-mail Address', 'User name', and 'Password'. A blue 'Save SMTP Settings' button is located at the bottom left of the form.

Server Information:	Logon Information:
Outgoing mail server (SMTP):	E-mail Address:
Outgoing mail server Port (SMTP):	User name:
☐ Enable SSL	Password:

Save SMTP Settings

Notification SMTP Settings

1 Server information

Enter the **Outgoing mail server (SMTP)** and its **Port**, and tick **Enable SSL** if your server requires it.

2 Logon information

Enter the sending **E-mail Address**, and the **User name** and **Password** for that mailbox.

3 Save

Select **Save SMTP Settings**.

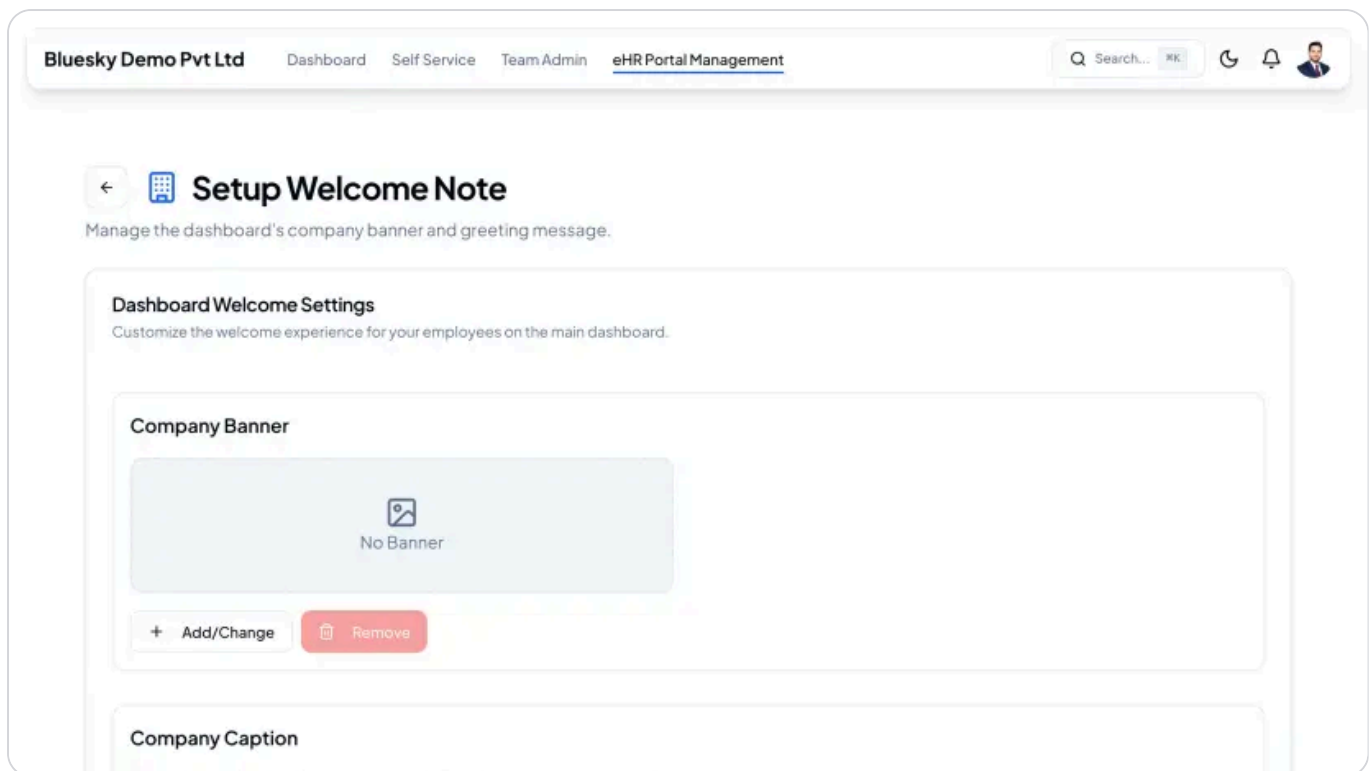
 Your IT team can give you these values. Use a dedicated mailbox such as *hr-notifications@yourcompany.com* rather than a person's account.

 If these settings are wrong, employees won't receive approval emails or password reset codes. After changing them, ask a colleague to try [Forgot password](#) to confirm emails arrive.

Dashboard welcome note

Set the company banner, caption and greeting employees see at the top of the dashboard.

Open **eHR Portal Management** → **Configure General Settings** → **Setup Welcome Note**.



Setup Welcome Note

1 Company banner

Under **Company Banner**, select **Add/Change** and choose an image.

2 Caption and greeting

Enter the **Company Caption** and the **Dashboard Greetings Text**.

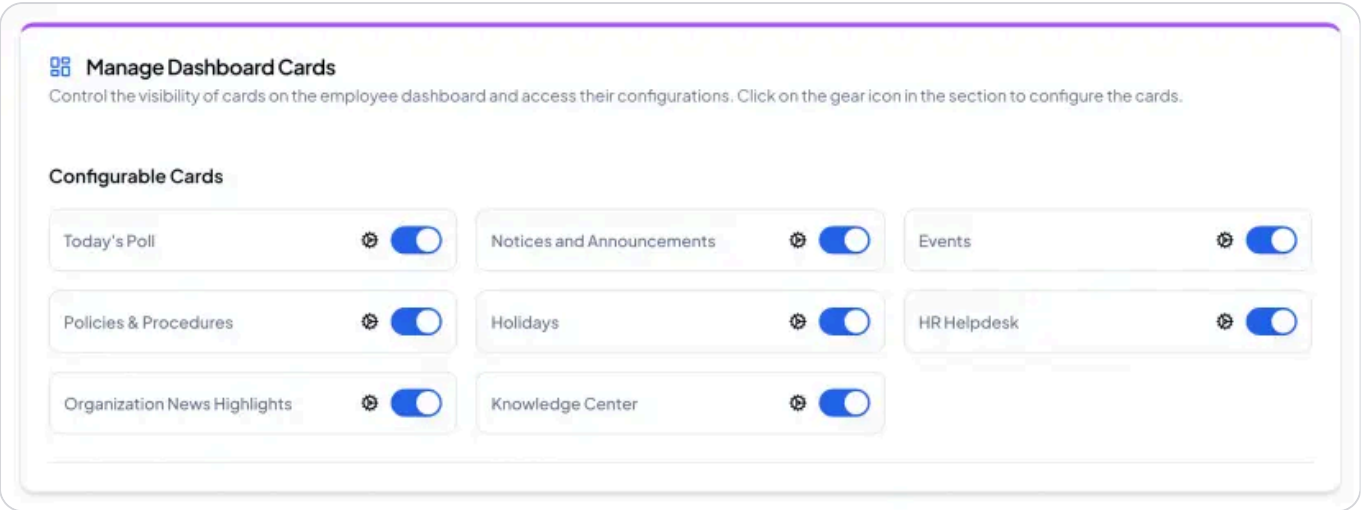
3 Save

Select **Save Settings**. Employees see the change the next time they open the dashboard.

Managing dashboard cards

Choose which cards appear on every employee's dashboard, and open each card's settings.

Manage Dashboard Cards sits on the eHR Portal Management page. It controls which cards everyone sees on the [Dashboard](#).



Manage Dashboard Cards

Show or hide a card

Use the switch next to each card under **Configurable Cards** — Today's Poll, Notices and Announcements, Events, Policies & Procedures, Holidays, HR Helpdesk, Organization News Highlights and Knowledge Center. The change applies to everyone straight away.

Cards under **Non-Configurable Cards** — Attendance, Leave Calendar, Birthdays, Pay Cycle and Attendance Calendar — are always shown.

Configure a card's content

Select the gear icon on a card to open where its content is managed:

Card	Opens
Today's Poll	Manage Polls
Notices and Announcements	Manage Notices
Events	Manage Events
Policies & Procedures	Manage Policies
HR Helpdesk	Manage Helpdesk Contacts
Organization News Highlights	Manage News

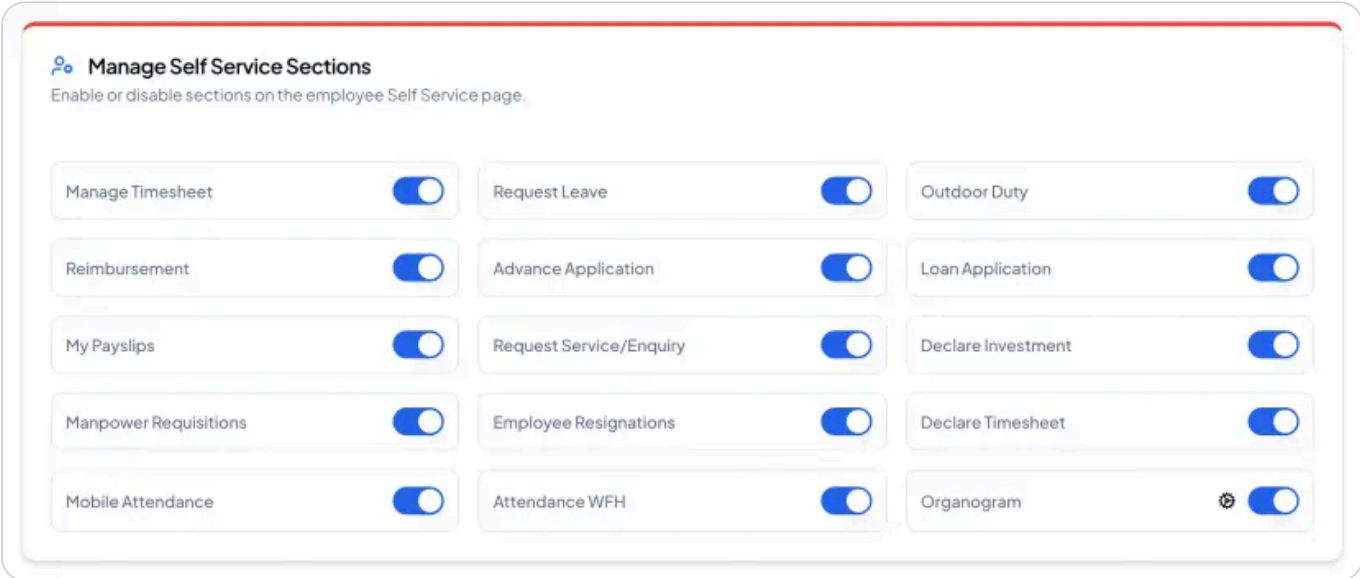


Hide a card when it has nothing in it — an empty Today's Poll card looks unfinished. Turn it back on when you launch the next poll.

Managing Self Service sections

Turn Self Service modules such as Loan Application, Outdoor Duty or Declare Timesheet on or off for your whole organisation.

Manage Self Service Sections sits on the eHR Portal Management page. Each switch turns a module on or off for everyone — its Self Service card, its pages, and the matching approval queue for managers.



Manage Self Service Sections

Turn a module on or off

Flip the switch next to the module. The main ones are:

Switch	Controls
Request Leave	Leave and leave approvals.
Manage Timesheet	Timesheet viewing.
Declare Timesheet	Whether employees can declare timesheet corrections.
Outdoor Duty	Outdoor duty and its approvals.
My Payslips	Payslips .
Declare Investment	Investment declarations .
Loan Application · Advance Application	Loans and salary advances .
Organogram	The organisation chart . Its gear icon opens chart settings.

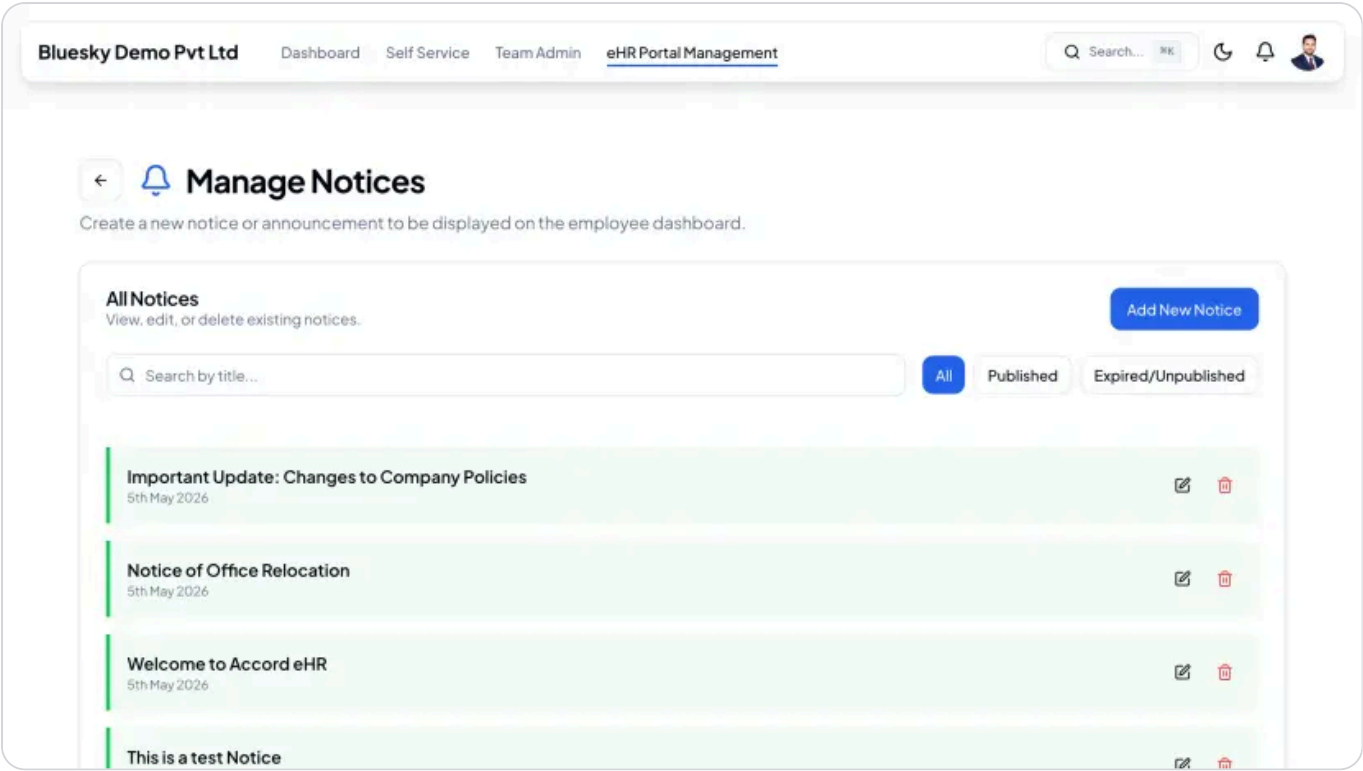
 Turning a module off hides it from employees and managers straight away. Make sure no requests are still waiting for approval before you switch a module off, or managers won't be able to act on them.

 When an employee says a feature is missing, check here first. Then check [User Access Permissions](#) for Team Admin and HR pages.

Publishing notices, news and events

Create, schedule, edit and remove the notices, news articles and events employees see on their dashboard.

Notices, news and events all work the same way. Open them from **eHR Portal Management → HR Tasks: Manage Notices, Manage News or Manage Events**.



Manage Notices

Type	Use it for	Appears in
Notice	Official announcements — policy changes, office closures, reminders. Notices expire.	Notices and Announcements
News	Company stories and highlights.	Organization News Highlights
Event	Something happening on a date and time — town halls, celebrations, training.	Events - Upcoming

Publish a notice

- 1

Start a new notice

Select **Add New Notice**.
- 2

Write it

Enter the **Title** and **Content**. Add a **Featured Image** if you like.

3 Set when it expires

Under **Expires After**, enter a number and choose the **Period** — **Day(s)**, **Week(s)**, **Month(s)** or **Year(s)**, or **Never** to keep it until you remove it. An expired notice drops off the dashboard.

The screenshot shows the 'Create New Notice' modal form. The form has the following fields and controls:

- Title:** A text input field with the placeholder 'Enter the title of the notice'.
- Content:** A large text area with the placeholder 'Write the main content of the notice here...'.
- Featured Image:** A file upload button labeled 'Choose File' and 'No file chosen'.
- Expires After:** A numeric input field with the value '0'.
- Period:** A dropdown menu with the value 'Never'.
- Publish:** A toggle switch that is currently turned on. Below it, text reads 'Uncheck this to save the notice as a draft.'.
- Publish Notice:** A blue button at the bottom right of the modal.

The background shows the 'Manage Notice' section of the dashboard, which includes a search bar, a list of notices, and buttons for 'Add New Notice', 'Published', and 'Expired/Unpublished'.

Writing a notice

4 Publish

Leave **Publish** switched on and select **Publish Notice**. Switch it off to save the notice as a draft instead.

News articles (**Add New Article** → **Publish News**) and events (**Add New Event** → **Publish Event**) follow the same steps. Events also need an **Event Date** and **Event Time**.

Edit, unpublish or delete

The list on each page shows everything you've created. Use the filter to show **All**, **Published** or **Expired/Unpublished** items, and search by title.

- Select edit, make your changes and select **Save Changes**.
- To take an item off the dashboard without deleting it, edit it and switch off **Publish**.
- Select delete and confirm **Are you sure?** to remove it permanently.



Keep the dashboard fresh: set notices to expire, and remove past events so **Events - Upcoming** only shows what's ahead.

Polls, policies and helpdesk contacts

Run a dashboard poll, publish policy documents, and list who employees should contact for help.

Polls

Open **eHR Portal Management** → **HR Tasks** → **Manage Polls**. Only one poll is live at a time; it appears in **Today's Poll** on everyone's dashboard.

The screenshot shows the 'Manage Poll' page within the 'eHR Portal Management' section of the 'Bluesky Demo Pvt Ltd' system. The page has a navigation bar with links to 'Dashboard', 'Self Service', 'Team Admin', and 'eHR Portal Management'. A search bar and user profile icon are also present. The main content area is titled 'Manage Poll' with a subtitle 'Create new polls to be displayed on the employee dashboard.' Below this, there is a 'Create New Poll' section with instructions: 'Fill in the details below to create a new poll. The poll will be visible to all employees on their dashboard.' The form includes a 'Poll Question' field with the placeholder text 'What would you like to ask?'. Under the 'Options' section, there are three input fields labeled 'First Label', 'Second Label', and 'Third Label (Optional)'.

Manage Poll

1

Create the poll

Enter the **Poll Question** and two or three answer **Options** (the third is optional), then select **Create Poll**.

2

Make it live

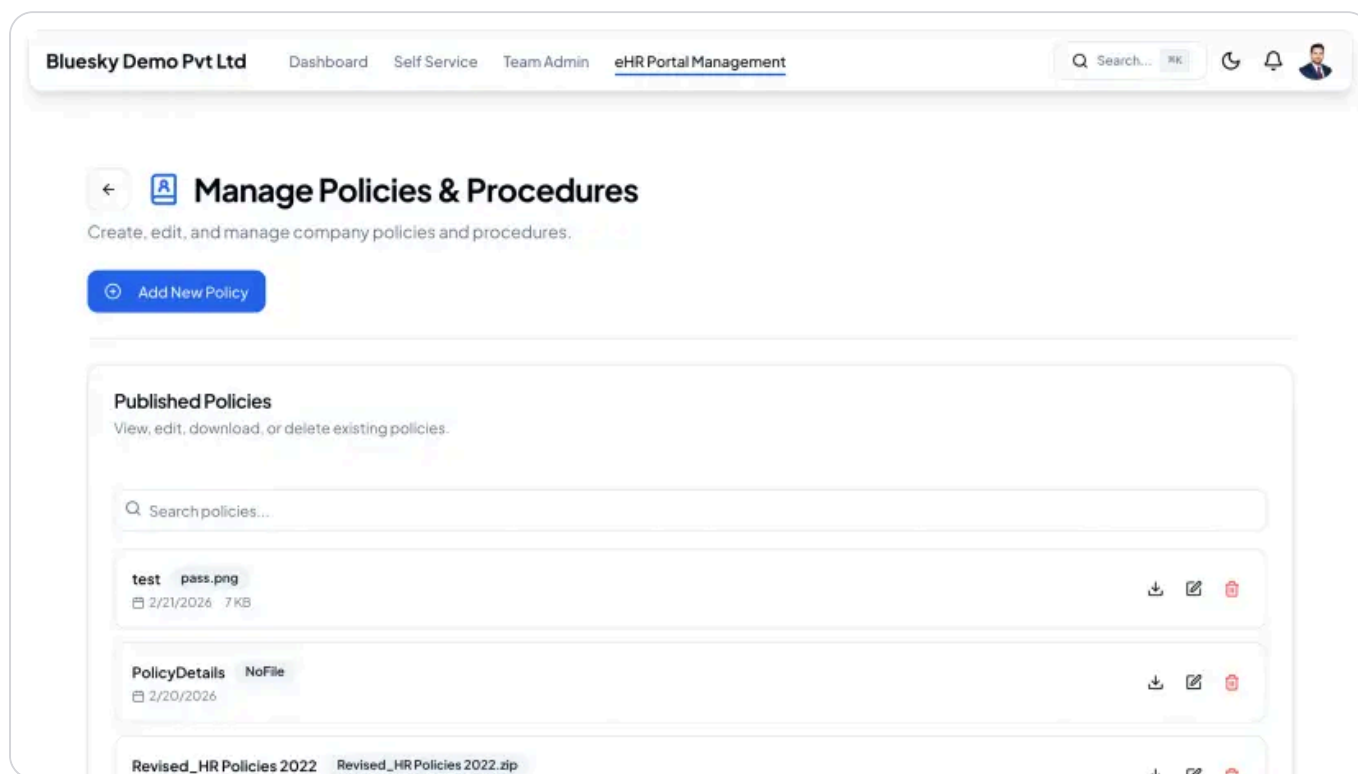
In **Published Polls**, select **Make Live** on the poll you want employees to see.

3 See the results

Select the poll to see **Poll Results** — how many people chose each option.

Policies and procedures

Open **Manage Policies** to publish documents such as a leave policy or code of conduct.



Manage Policies & Procedures

1 Add the policy

Select **Add New Policy**. Enter the **Policy Name** (for example *Work From Home Policy*), choose a **Category**, and use **Attach Document** to upload the file.

2 Make it visible

Tick **Published** — *Make this policy visible to all employees.*

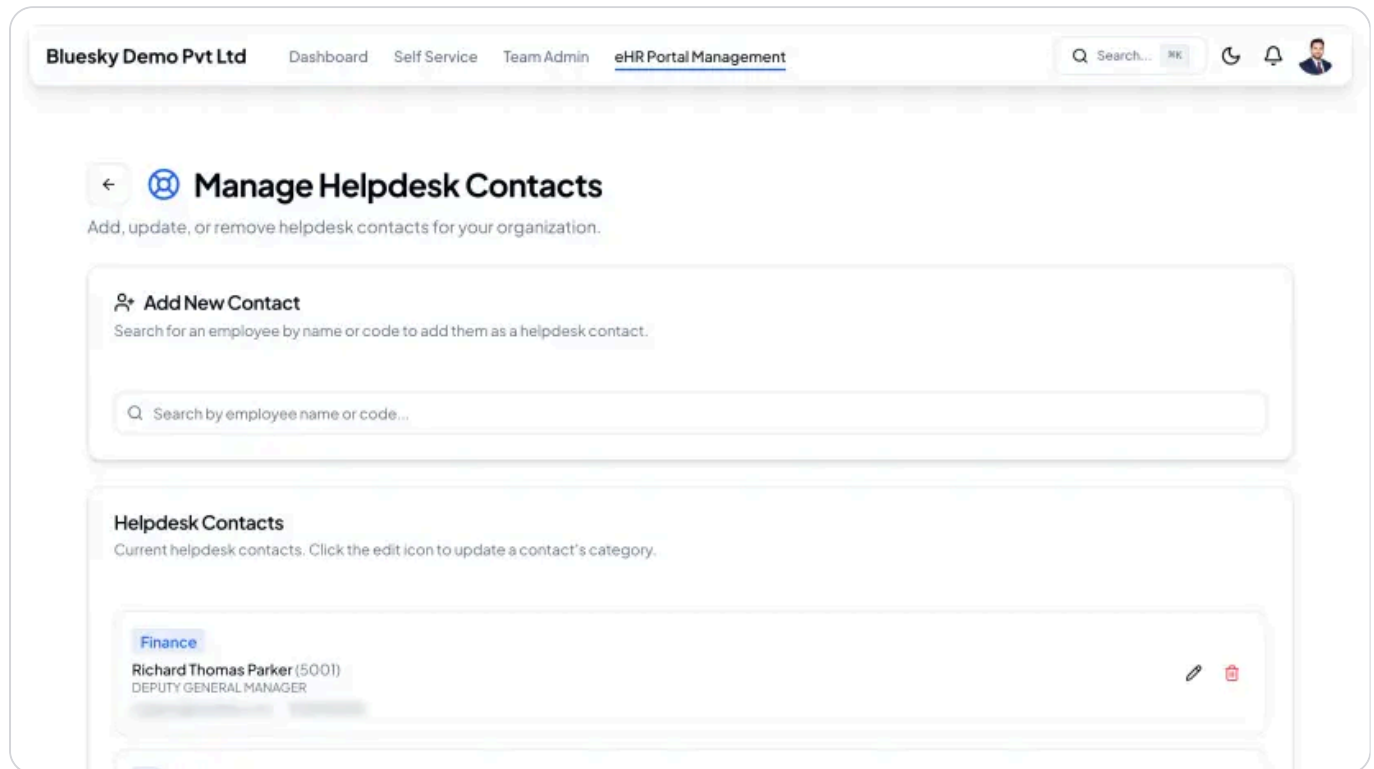
3 Publish

Select **Publish Policy**.

In **Published Policies**, use the **Download**, **Edit** and **Delete** icons on each policy. Saving an edit uses **Update Policy**.

Helpdesk contacts

Open **Manage Helpdesk Contacts** to choose who appears on the dashboard's **Helpdesk** card.



Manage Helpdesk Contacts

1

Find the employee

Under **Add New Contact**, search by employee name or code.

2

Give them a category

Enter what they help with — for example *HR*, *IT*, *Finance* or *Payroll*.

3

Add

Select **Add Contact**. They appear under **Helpdesk Contacts** and on the dashboard.

Use **Edit Category** to change what a contact covers, and **Delete Contact** to remove them.

-  The Helpdesk card shows each contact's work email and phone from their employee record. Make sure those are up to date.

FROM THE INTELLIOB SUITE · MONEYFACTS



Run the rest of the business on Intelliob

MoneyFacts is a cloud ERP with GST invoicing, e-Invoice, e-Way Bill, inventory and 40+ financial reports.

[Start a free trial ↗](#)

CHAPTER 6

Troubleshooting & FAQ

Fixes for sign-in problems, missing features and approvals that do not show up.

Find your problem below. If none of these help, contact your HR team — they can see your account and, if needed, sign in as you to check (see [User impersonation](#)).

I can't sign in

What you see	Fix
Incorrect username or password, please try again.	Check Caps Lock and retype. Still failing? Reset your password .
Logins for this company are currently disabled, please contact Intelliob Support.	Sign-in is switched off for your company — contact HR.
Too many requests. Please try again later.	Wait a few minutes before trying again.
The company name after the first step isn't yours	Select Wrong company? Enter code again. and check your company code.
No password-reset email	Check spam. Your registered email may be out of date — ask HR to update it.

I can't see a feature

A missing menu item, card or button is almost always one of these:

1. **Your role.** Team Admin and eHR Portal Management only appear if HR has given you that access.
2. **Your company hasn't enabled it.** HR switches Self Service modules on or off for everyone in [Self Service sections](#).
3. **It's not part of your plan.** Some modules are only available to certain organisations.



Use **Search** (`Ctrl` + `K`) and type the feature name. If it doesn't come up, it isn't enabled for you.

I see "Access Denied"

You opened a page your role doesn't allow — usually from an old bookmark or a link someone shared. You're returned to the Dashboard. Ask HR if you need access.

My request is stuck as Pending

- Check who it's waiting for: on [Leave](#), **Leave posted would require approval from** names your approver; other pages show approver information too.
- Remind your approver — it's in their Team Alerts.
- If the approver is wrong or has left, ask HR to fix your reporting line or the [approval workflow](#).

I can't cancel my leave

You can delete a **Pending** application and cancel an **Approved** one only until the leave date. After that you'll see **Leave Cannot Be Cancelled** — contact your manager or HR.

My profile change hasn't appeared

Profile changes need approval. Until then the section shows **Pending Approval** and your old details stay in place. Ask your manager to check **Personal File Changes** in Team Alerts.

Today's attendance shows Not Marked

Biometric punches can take up to 3 hours to appear, longer if a device has problems. Wait at least 24 hours before [declaring a correction](#).

Managers: a request isn't in my approval list

- It may have been sent to a different approver — check the employee's reporting line in the [reporting matrix](#).
- If the workflow uses **Any One** approval, another approver may already have acted.
- It may have escalated or been auto-rejected after the number of days set in the workflow.

Payslip shows Not Yet Published

Payroll hasn't released that month yet. Check again after pay day.



Software for the way Indian businesses work

Accounting, payroll, HR and attendance — GST-ready, on any device, since 2003.



Accord eHR

HRMS & employee self-service

Self-service, approval workflows and HR administration — integrates with PayCare and TimeMate.

intelliob.com/accord ↗



PayCare

Payroll & statutory compliance

PF, ESIC, Professional Tax, TDS, Form 16 and 24Q in a guided payroll workflow, with an employee mobile app.

intelliob.com/paycare ↗



TimeMate

Time & attendance

Biometric devices and mobile geo-fencing, shift rostering and 60+ payroll-ready reports.

intelliob.com/timemate ↗



MoneyFacts

Cloud ERP & GST billing

Accounting, GST invoicing, e-Invoice and e-Way Bill, inventory and 40+ reports. 15-day free trial.

intelliob.com/moneyfacts ↗



BillGini

AI expense manager

Automatic expense categorisation, subscription tracking and bill reminders. In early access.

intelliob.com/billgini ↗



Free Tools

Salary, tax & GST calculators

Take-home salary, HRA, PF, ESIC and gratuity calculators and a GST invoice generator — free, no sign-up.

intelliob.com/tools ↗

HELP & DOCUMENTATION

intelliob.com/docs

TALK TO US

intelliob.com/contact

EMAIL

info@intelliob.com