

Employees

The employee directory, adding people, and who can see or change what.

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The employee directory

Employee → Employees is the single record of everyone in your organisation. Every other module — attendance, leave, payroll, performance — reads from this record rather than keeping its own copy, so an employee's department, job position or badge ID only needs to be correct in one place.

What you see

A searchable list, one row per employee, with their department, job position and status (**Active**, or otherwise). Above the list:

- **Search** by name, department or badge ID.
- **Department** and **Job position** filters, plus **Group by** and **More filters** for a narrower view.
- Tabs alongside the main list: **Document Requests**, **Shift Requests**, **Work Type Requests**, **Rotating Shift Assign**, and further screens under **More**. Each is its own queue of requests employees have raised, separate from the directory itself.

Free trial. Your workspace is fully available.

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Search modules...

Dashboard

Recruitment

Onboarding

Employee KYC

Employee

Attendance

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Admin view

Employee view

Signed in as Ananya Iyer · HR Head

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Ananya

Dashboard / Employee / Employees

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Add Employee

Employees

Document Requests

Shift Requests

Work Type Requests

Rotating Shift Assign

Rotating Work Type Assign

More

Search employees by name, department or badge ID

Department

Job position

Group by

More filters

NAME	DEPARTMENT	JOB POSITION	STATUS
 Aarav Sharma	Finance	Legal Associate - (Finance)	Active
 Ananya Iyer	Customer Success	Platform & Services - Support - (Customer Success)	Active
 Arjun Mehta	People Success	Specialist - (People Success)	Active
 DA Demo Admin	Administration	Facility - (Administration)	Active
 DU Demo User	Administration	Facility - (Administration)	Active
 Diya Malhotra	Supply Chain	Logistics - (Supply Chain)	Active
 Jayendra Mestry	People Success	Associate Executive - (People Success)	Active
 KS Kabir Singh	Engineering	IT - (Engineering)	Active
 Karan Singh	Marketing	Platform & Services - (Marketing)	Active

Opening a record

Selecting an employee opens their full profile: personal details, employment information, the documents they have been issued, and their history in the organisation. What you can change there depends on your role — see [Roles and permissions](#). The tabs and the Edit page are described in [An employee's profile](#).

Who can do what

Viewing and editing the directory is controlled the same way as every other module: through **user groups** and **employee permissions**, not through a special "HR mode". A person with the right permission sees the same Employees screen whether they are in HR, a manager, or an administrator; the difference is which actions are available to them once they are there.

What to read next

- [Adding an employee](#)
- [Roles and permissions](#)

Adding an employee

Every employee record starts here, whether they will use BlueOneHR themselves or the record exists purely for HR and payroll purposes.

<https://www.youtube-nocookie.com/embed/F-CVobXZLVA>

[Add your first employee](#)

Before you begin

You need permission to create employees, which your administrator grants through **user groups** (see [Roles and permissions](#)). Have on hand: the person's legal name, a work email, phone number, and date of birth. Department and job position are easiest to set if they already exist under **Settings**; if not, create them first — see [Company setup](#).

Steps

1. Go to **Employee → Employees**.
2. Select **Add Employee**.
3. BlueOneHR proposes the next **Badge ID** automatically, using your organisation's badge prefix (set once under **Settings → General**). You can change it before saving if you need to.
4. Enter **First Name** and **Last Name**, and optionally a profile photo.
5. Enter **Email** and **Phone** — both required.
6. Fill in address, country, state, city and postal code if you track them.
7. Confirm the **date of birth** and **gender**.
8. Optionally record qualification, experience, marital status, number of children, and an emergency contact (name, number and relation).
9. Select **Create Employee**.

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Admin viewEmployee view

Signed in as Ananya Iyer · HR Head

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Ananya

Search modules...

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Settings

Dashboard / Employee / Directory / Add Employee

Add Employee

BADGE ID

BOHR0022

FIRST NAME *

First Name

LAST NAME

Last Name

EMPLOYEE PROFILE

Choose File

No file chosen

EMAIL *

Email

PHONE *

Phone

ADDRESS

Address

COUNTRY

Country

STATE

State

CITY

City

ZIP

Zip

DOB

13/09/2026

GENDER *

Male

QUALIFICATION

Qualification

EXPERIENCE

Experience

MARITAL STATUS

Single

CHILDREN

Children

EMERGENCY CONTACT

Emergency Contact

EMERGENCY CONTACT NAME

Emergency Contact Name

EMERGENCY CONTACT RELATION

Emergency Contact Relation

What happens next

The employee appears in the directory immediately, with the status **Active**. Creating the record does **not** by itself:

- assign a department, shift or work type — those are set from the employee's profile once created;
- tell the person how to sign in — HR passes on the address and first-password arrangements (see [First login and getting access](#) for what is and is not confirmed);
- create a payroll contract — payroll only computes for an employee with an **active contract**, set up separately under **Payroll → Configuration → Contract**.

Notes

- The Badge ID prefix and whether badge numbering is active are organisation-wide settings, not something you choose per employee.
- Required fields are marked with an asterisk on the form; everything else can be filled in later from the employee's profile.

Troubleshooting

The email is already in use. Each employee needs a unique email. Check the directory search before assuming the person has no existing record — a re-hire or a previously deactivated record can collide.

Related

- [The employee directory](#)
- [Roles and permissions](#)

Importing many employees

The **Employees** screen has an **Import** entry for bringing in many employees from a file instead of adding them one at a time (see [Adding an employee](#) for the one-at-a-time form). This page describes the Import dialog and the template it offers. It does **not** describe a complete import, because the upload step has not been tried; see **Not confirmed** below.

https://www.youtube-nocookie.com/embed/CUnsgJ_0kXQ

[Look at the Import Employee dialog \(a tour\)](#)

Before you begin

Sign in as someone who can manage employees (see [Roles and permissions](#)). The steps below were looked at as an HR Head.

Open the Import dialog

1. Go to **Employee → Employees**.
2. Select **Actions**. The menu lists **Import**, **Export**, **Archive**, **Un-Archive**, **Bulk Mail**, **Bulk Update** and **Delete**.
3. Select **Import**.

A dialog titled **Import Employee** opens. It contains:

- a large area that reads **Upload a File** and **Drag and drop files here**;
- a **Choose file** button, which shows **No file chosen** until you pick one;
- a **Download Template** link;
- an **Upload** button.

Download the template

Select **Download Template**. A prompt asks **Do you want to download the template?** with **Confirm** and **Cancel** buttons. Choose **Confirm** to download the file, or **Cancel** to leave the dialog

as it was.

The file is a spreadsheet named `work_info_template.xlsx`, with one sheet, a single header row and no example rows. The header row has 19 columns:

Badge ID	First Name	Last Name
Email	Phone	Gender
Department	Job Position	Job Role
Shift	Work Type	Reporting Manager
Employee Type	Location	Date Joining
Basic Salary	Salary Hour	Contract End Date
Company		

Not confirmed

These have not been tried, so this page does not say what happens:

- Choosing a file and selecting **Upload**, and what appears afterwards.
- Which of the 19 columns are required, and what format each value must have (for example dates, gender, or how a department or reporting manager is matched).
- What happens with a badge ID or email that already exists, or with a row that has an error.
- Whether a file with fewer or more columns than the template is accepted.
- Whether new employees receive a sign-in or other notification.
- The maximum file size or number of rows, and which file types besides `.xlsx` are accepted.
- Whether a partly valid file imports the good rows or none.

Related

- [The employee directory](#)
- [Adding an employee](#)
- [Roles and permissions](#)

Roles and permissions

BlueOneHR does not have a fixed list of roles like "HR Manager" or "Payroll Officer" built in. Instead, access is built from two things: **user groups**, and **employee permissions** assigned directly to a person. Both live under **Settings → General**.

<https://www.youtube-nocookie.com/embed/o-0Nz-WU9jU>

[Who can see and change what: roles and permissions](#)

User groups

A user group is a named bundle of permissions — for example, everything a payroll administrator needs, or everything a line manager needs to approve their team's requests. Create the group once under **Settings → General → User Group**, then add employees to it.

Group membership is the normal way to manage access for more than a handful of people: change what the group can do, and everyone in it changes with it.

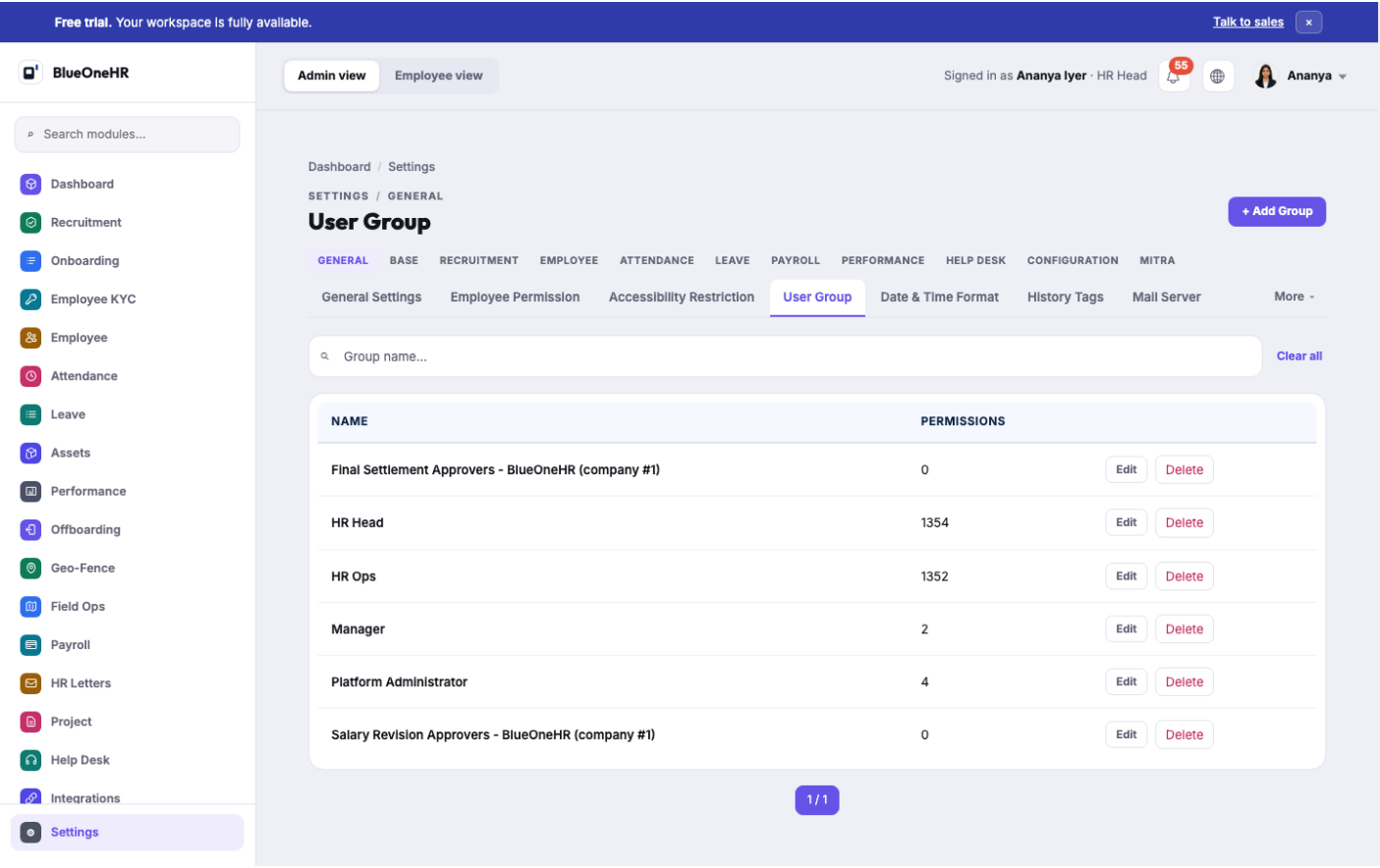
Direct employee permissions

Settings → General → Employee Permission grants or removes an individual permission for one specific employee, outside of any group. Use this for an exception — one person who needs a single extra permission — rather than as the everyday way of managing access. A permission granted this way does not appear anywhere in the group list, so it is easy to forget it is there; prefer a group for anything more than a temporary exception.

What a permission actually covers

Permissions are scoped to a module and an action — for instance, the ability to view the payroll register is separate from the ability to approve a payroll run, and both are separate from being able to see attendance records. Assign the narrowest set that lets someone do their job: a manager who should approve leave for their own team does not need the permission that lets them view payroll for the whole company.

Screenshot



Related

- [The employee directory](#)
- [General settings](#)

An employee's profile

Select a name in **Employee** → **Employees** and you land on that person's profile: one page that gathers their details, their pay, their time, their leave and the things they hold. This page describes what is on it, who can open it in full, and what **Edit** offers.

https://www.youtube-nocookie.com/embed/2R-x7y_RgzM

[Read and update an employee record](#)

Before you start

Who sees what is decided by the profile page itself:

You are	You see
Anyone with permission to view employees (HR Head, HR Ops and, in the test workspace used for this page, the Manager group)	The full profile, with every tab.
The employee themselves	Their own full profile.
The employee's reporting manager	The full profile.
Any other signed-in employee	Only a Work information card: department, job position, job role, who they report to, employee type, work type, shift, location, work e-mail, work phone and "with the company since". The page says: "This is the work information anyone in the company can look up. Personal details, pay and records are visible only to [the person], their reporting manager, and HR."

That last row was checked by opening a colleague's profile signed in as an Employee. The personal fields are not part of that page at all.

The profile

Tab	What it shows
About	Personal Information, Employment, Compensation and Compliance (contract, wage type, bank account and bank name) and Team , the colleagues in the same department.
Work Type & Shift	Rotating shift and rotating work type assignments, and shift and work type requests.
Attendance	Recent attendance: date, clock in, clock out, worked hours, status.
Leave	Leave balance by leave type.
Payroll	Payslips by period: gross pay, deduction, net pay, status.
Allowance & Deduction	The allowances and deductions applied to this person.

Tab	What it shows
Penalty Account	Penalties recorded, or "No penalties recorded".
History	No change log is shown here in this release.
Assets	Assets assigned to them, with assigned date and return state.
Performance	Performance feedback cycles.
Groups & Permissions	The sign-in account: username, staff access, superuser, groups and individual permissions.
Note	Notes recorded about the person.
Documents	Documents on file, with status, issue date and expiry.
Mail Log	E-mails logged for the person's address.
Bonus Points	Bonus points.

One thing to know:

- **Employee KYC is not on this page.** PAN, Aadhaar and similar records live in their own module. This page does not show them.

Edit

Edit opens **Edit** followed by the person's name, with three tabs.

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Upgrade

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Admin view

Employee view

Signed in as Ananya Iyer · HR Head

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Search modules...

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Help Desk

Integrations

Settings

Dashboard / Employee / Employee / Edit

Edit · Diya Malhotra

Personal Info

Work Info

Bank Info

Work Info

Department, Job Position, Job Role, Work Type and Employee Type are plain dropdowns here. The real page's inline "Create New X" shortcut for those fields is not replicated in this preview; create new options on the real Employee page first if the one you need is missing.

DEPARTMENT

Supply Chain

JOB POSITION

Logistics - (Supply Chain)

JOB ROLE

Sr Manager - Logistics

REPORTING MANAGER

---Choose Reporting Manager---

SHIFT

General

WORK TYPE

Full Time

EMPLOYEE TYPE

On Payroll

EMPLOYEE TAG

OnPayroll Intern

WORK LOCATION

Karnataka

COMPANY

BlueOneHR

WORK EMAIL

(hidden in this capture)

WORK PHONE

(hidden in this capture)

JOINING DATE

14/08/2023

CONTRACT END DATE

dd/mm/yyyy

BASIC SALARY

(hidden in this capture)

SALARY PER HOUR

(hidden in this capture)

ADDITIONAL INFO

(hidden in this capture)

EXPERIENCE

(hidden in this capture)

Work e-mail, work phone, basic salary, salary per hour, additional information and experience are masked in this capture.

Tab	Fields
Personal Info	Badge ID, First name, Last name, Employee profile (photo), E-mail, Phone, Address, Country, State, City, Zip, DOB, Gender, Qualification, Experience, Marital status, Children, Emergency contact, Emergency contact name, Emergency contact relation. E-mail, Phone, First name and Gender are required.
Work Info	Department, Job position, Job role, Reporting manager, Shift, Work type, Employee type, Employee tag, Work location, Company, Work e-mail, Work phone, Joining date, Contract end date, Basic salary, Salary per hour, Additional info, Experience.
Bank Info	Bank name, Account number, Branch, Bank code #1, Address, Country, State, City, Bank code #2. Bank name, Account number, Branch, Bank code #1 and Address are required.

Each tab has its own save button (**Save Personal Info, Save Work Info, Save Bank Info**), so saving one tab does not save the others.

Who may edit: someone with permission to change employees, or the employee's reporting manager. An employee who selects **Edit** on their own profile is returned to the profile page; the message reads "You do not have permission to edit this employee."

Saving the **Work Info** tab notifies the employee with the message "Your work details has been updated."

What you should see

Opening a profile as an HR user shows the header card and the **About** tab. A tab that has nothing to show says so in words, such as "No documents on file" or "No notes recorded".

If it does not work

- **You only see a Work information card.** You are not the person, their reporting manager or someone with permission to view employees. Ask HR.
- **Edit does nothing for you.** See who may edit, above.
- **A department, position, role, work type or employee type you need is not in the Work Info list.** Those fields are dropdowns of existing values. Create the missing one first; see [Company setup](#).

Not confirmed

- **Saving** any Edit tab was not tried live. The three forms were opened, never submitted, so what each save does beyond the notification named above is not confirmed.
- **The profile of a person with more history than the sample data used** (for example a long Documents or Mail Log list) was not seen.
- **Whether a reporting manager who is not in HR can open Edit on a direct report** was not tried.

Related

- [The employee directory](#)
- [Adding an employee](#)
- [Roles and permissions](#)
- [Payslips](#)
- [How leave works](#)