



USER MANUAL		
Obanana Corp. 16 th Floor PMI Tower, Cabanillas Corner 273 Pablo Ocampo Sr. Ext., Makati City Philippines 1203	Document No.:	OBN-MNL-OPS-008
	Date Approved:	09-July -25
	Client:	FTI
Employee Management		

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Employee Management

1. Introduction

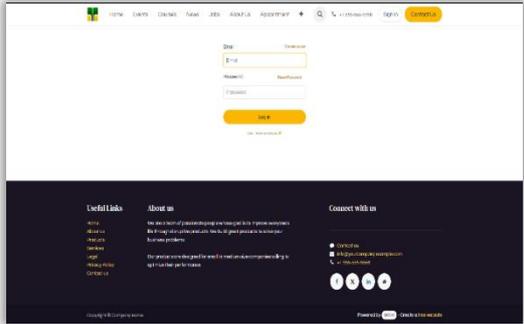
This user manual offers a detailed step-by-step guide for effectively using the Human Resource tools within the system. It aims to assist users in creating and managing employee profiles, tracking training progress, handling appraisals, and organizing HR documents with ease. Featuring a user-friendly interface, the system simplifies HR tasks and supports efficient workforce management.

2. Objective

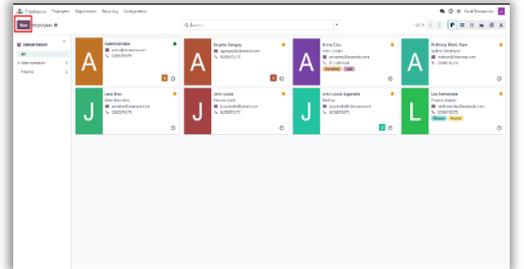
The objective of this manual is to guide users in navigating the core features of the Human Resource system. By using this guide, users can efficiently and accurately complete key HR tasks in a structured way. These tasks include managing employee records, monitoring professional development, assessing performance, and organizing HR documents in a centralized system to support informed decision-making and ensure regulatory compliance.

3. Getting Started

3.1. Navigating the system

HOW TO ACCESS AND NAVIGATE THE SYSTEM	
<ol style="list-style-type: none"> Open the web browser and enter the system URL. <ul style="list-style-type: none"> Refer to Test URL in the Glossary of Terms Log in using your credentials. 	
<ol style="list-style-type: none"> Click on the Employees module from the main dashboard to access HR tools and features. 	

3.2 Employee Management

HOW TO CREATE A NEW EMPLOYEE	
<ol style="list-style-type: none"> From the Employees module, click New. 	



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2. Fill in employee details:

- Employee Name (Full legal name)
- Job Title (e.g., Sales Manager)
- Work Email
- Work Phone
- Company (Auto-filled if using a single company)
- Department (Optional)
- Manager (Select from existing employee list)

3. Save the record to store the employee's information.

HOW TO EDIT EXISTING RECORDS

1. Go to **Employees**.

2. Click the employee you wish to edit.

3. Modify the necessary fields.

4. Click Save.

Note: In some, changes may **auto-save** upon clicking away. However, for full form views, you must click **Save manually** to confirm the edits.



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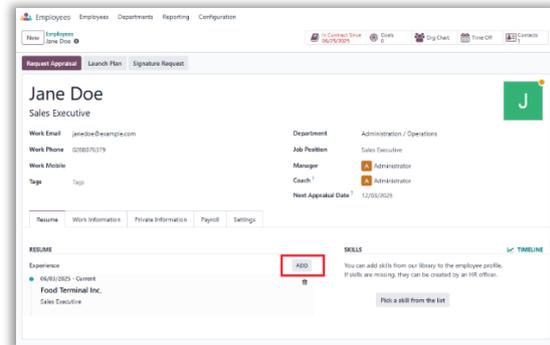
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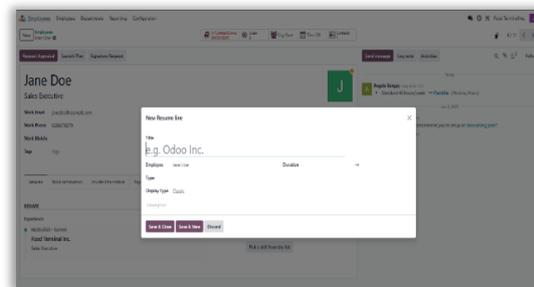
Employee Management

HOW TO MANAGE EXPERIENCE AND TRAINING

1. Navigate to the Employees Module.
2. From the Employees module, on the resume tab, click Add button.
3. Use the Resume tab to manage past experience and training.
4. Click on **Add** to open the resumé entry form.



5. **Fill in the Fields**
 - **Title:** Enter a short name for the training or experience (e.g., “Customer Service Training” or “5 Years in Retail”).
 - **Type:**
 - Choose **Training** for courses, certifications, or seminars.
 - Choose **Experience** for job roles, past positions, or fieldwork.
 - **Date Start / End:** Set the time period of the activity.
 - **Description** (optional): Add more details about the training or experience.
 - Click **Save** on the line, then **Save** the entire employee record.
6. After filling in the details, click **Save & Close** to add the entry, or **Save & New** to add multiple entries.





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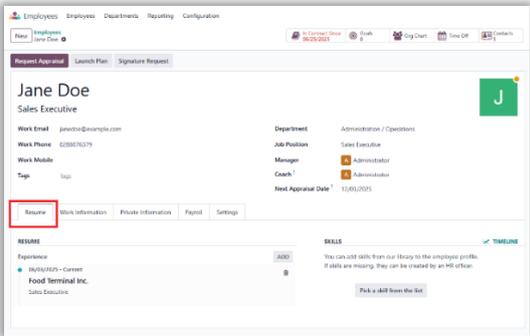
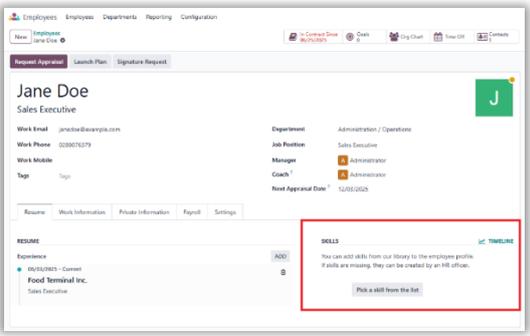
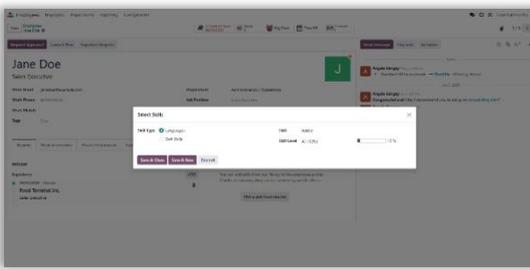
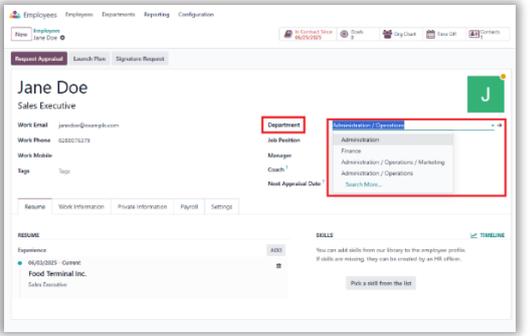
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3.3. Assigning Skills, Department, And Job Position

ASSIGNING SKILLS	
<p>1. Within an employee record, click the Resume tab.</p>	
<p>2. Under Skills, click “Pick a skill from the list” button.</p>	
<p>3. Choose from the available skills.</p> <p>4. After selecting skills click “Save & Close” to save.</p>	
HOW TO MANAGE DEPARTMENT	
<p>1. Within an employee record, navigate the Department field and choose the appropriate department from the dropdown menu.</p> <p>2. Assign a department by selecting it from the list to link it to the employee.</p>	



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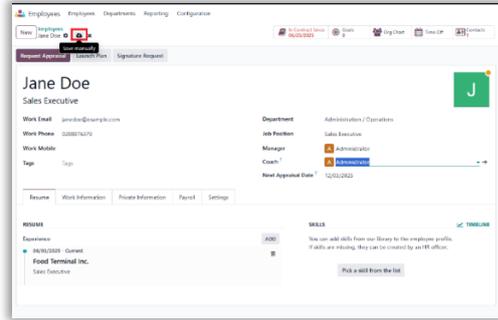
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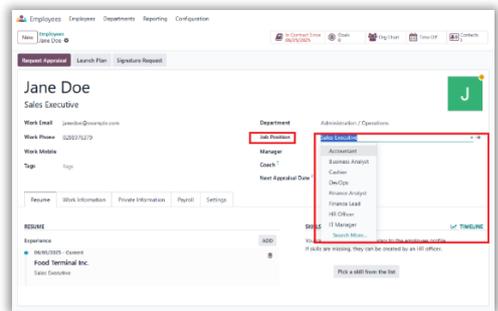
Employee Management

3. Save Manually.

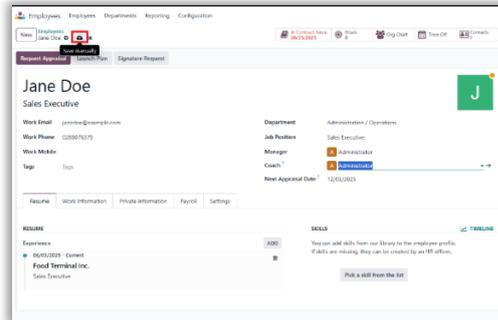


HOW TO ASSIGN JOB POSITION TO EMPLOYEE

1. Within an employee record, navigate the **Job Position** field and choose the appropriate job position from the dropdown menu.
2. Select a job position by selecting it from the list to link it to the employee.



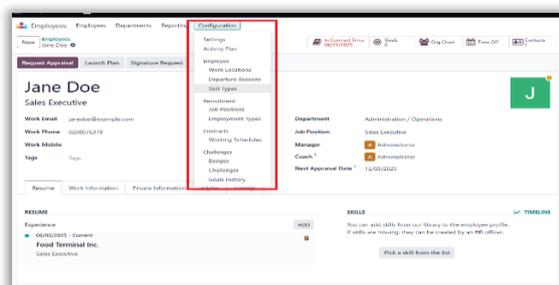
3. Save Manually.



3.5 Configure Skills

HOW TO CONFIGURE SKILLS

1. Inside the **Employees** module, click on **Configuration > Skill Types**.



2. Click **New**.





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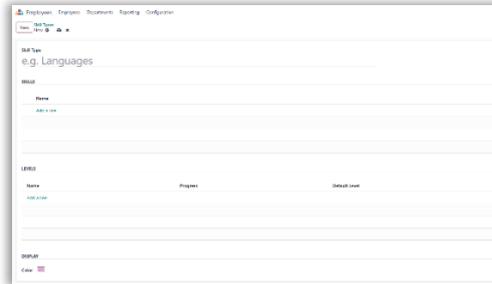
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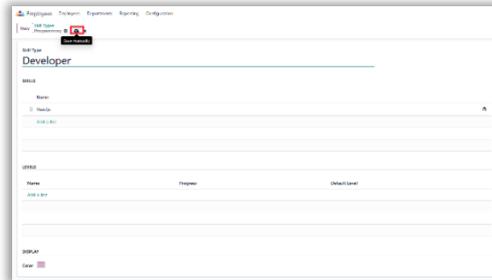
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- Fill in the **Skill Type Name** (e.g., Programming Languages, Design Tools).
- (Optional) Add skills directly under this type by clicking "Add a line."

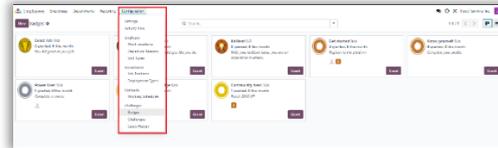


- Save Manually.

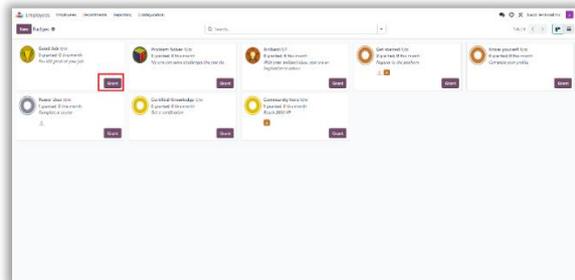


ASSIGNING A BADGE

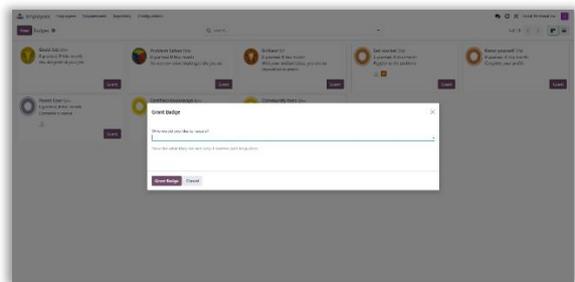
- Navigate to **Employees > Configurations > Challenges > Badges**.
- Select the badge you wish to grant.



- Click on Grant.



- In the pop-up window:
 - What are you thankful for?
 - Comment: Add a reason or note for awarding the badge.
- Click **Grant Badge** to assign it to the employee.





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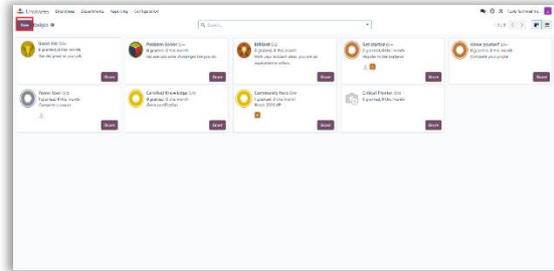
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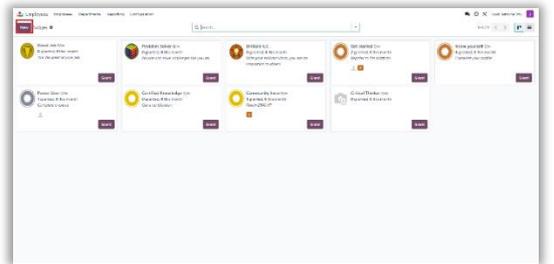
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CREATING A NEW BADGE

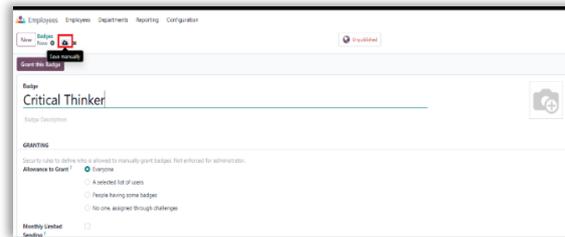
1. In the **Badges** view, click on the **New** button.



2. Fill in the required details.



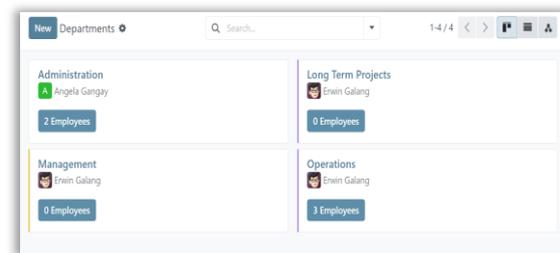
3. **Save manually** to create the badge.



3.6 Department Management

ACCESSING THE DEPARTMENTS FEATURE

1. Navigate to the **Employees** module from the dashboard.
2. Click on **Departments** to view and manage departmental structures.





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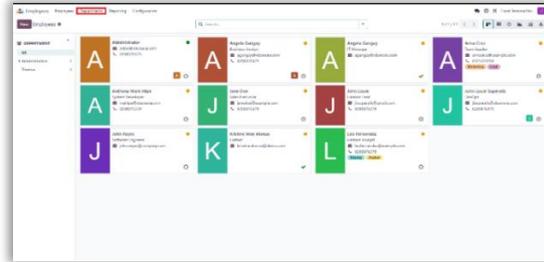
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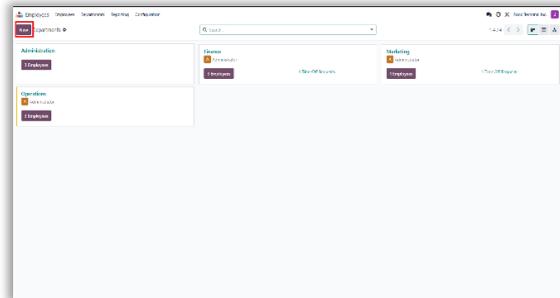
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HOW TO CREATE A DEPARTMENT

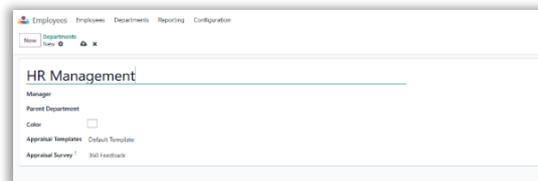
1. Click on the **Departments** menu/tab.



2. Click the **New** button.



3. Enter the **Department Name**.
4. (Optional) Select a **Parent Department**.



HOW TO EDIT A DEPARTMENT

1. Click on the department you want to edit.





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2. Make the necessary changes.



3. Click **Save manually** to update the department details.



HOW TO DELETE A DEPARTMENT

1. Click on the department you want to delete.



2. Click the **Action** button in the top right corner.

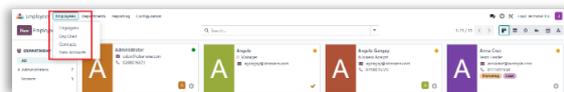
3. Select **Delete**.

4. Confirm the deletion when prompted.

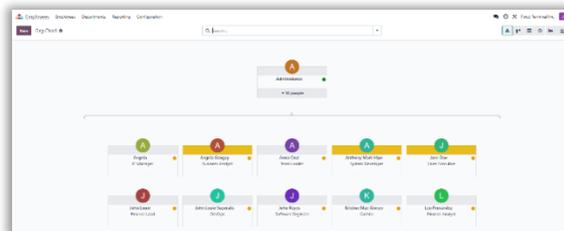


HOW TO VIEW ORGANIZATIONAL CHART

1. Navigate **Employees** tab and select **Organization Chart**.



2. Use the visual chart to view hierarchy based on assigned managers.





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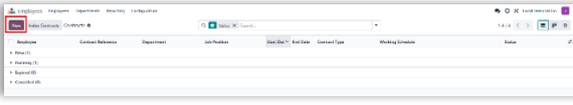
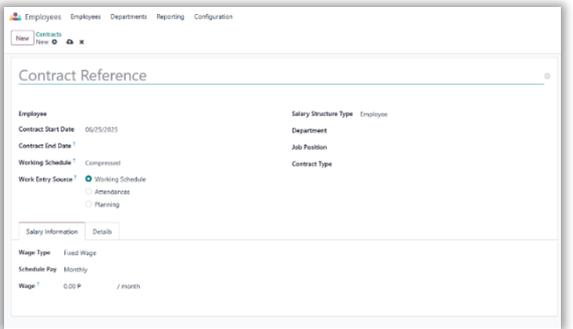
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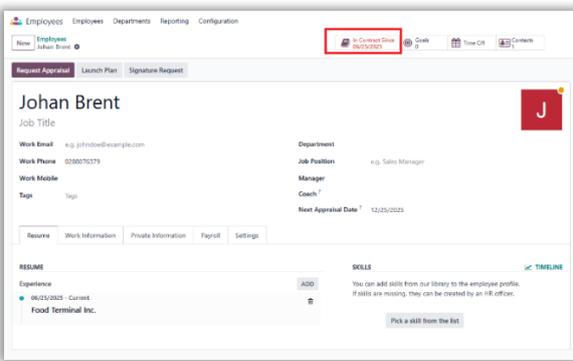
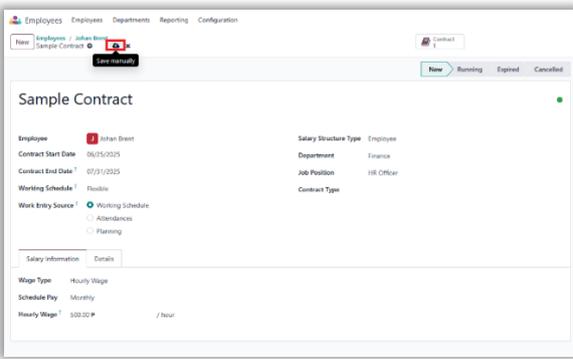
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3.7 Contract Management

HOW TO CREATE CONTRACT

<ol style="list-style-type: none"> 1. Navigate Employees tab and select Contracts. 	
<ol style="list-style-type: none"> 2. Click New button. 	
<ol style="list-style-type: none"> 3. Fill out: <ul style="list-style-type: none"> • Contract Reference • Job Position • Contract Type • Salary Structure • Duration (Start Date, End Date) 4. Save. 	

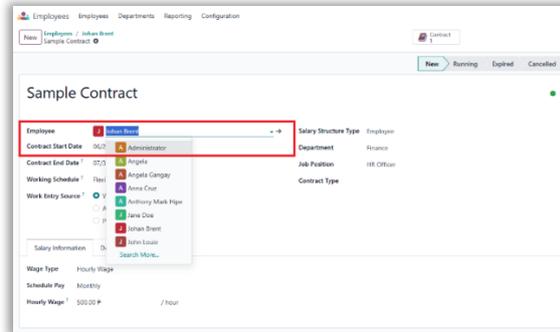
HOW TO EDIT CONTRACT

<ol style="list-style-type: none"> 1. Open the employee's profile. 2. Go to Contracts tab. 3. Click the contract. 	
<ol style="list-style-type: none"> 4. Make changes. 5. Save Manually. 	

Employee Management

HOW TO ASSIGN CONTRACT

- From the Contracts view, choose the employee under the **Employee** field before saving.



3.8 Configuration

ACTIVITY PLAN

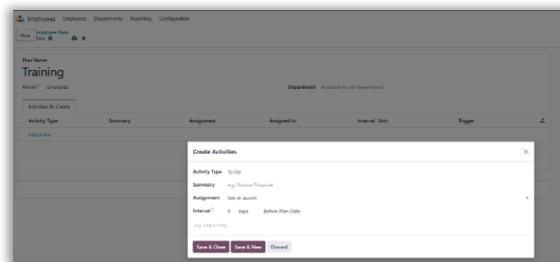
To add:

- Open the **Employees > Configure > Click Activity Plans**.
- Click **New**.
- Enter the **Plan Name** and define the activity type.
- Click **Save & Close**.



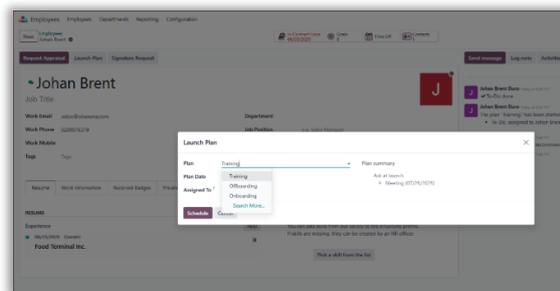
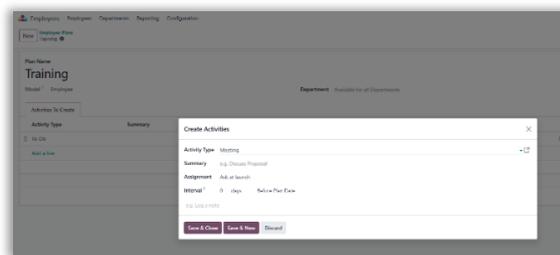
To edit:

- Open an existing activity plan.
- Make the changes.
- Click **Save & Close**.



To assign:

- Go to the employee's profile.
- Select **Launch Plan** tab.
- Choose **Activity Type** in dropdown menu.
- Click **Schedule**.





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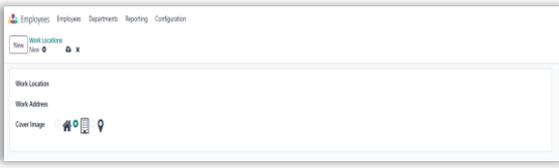
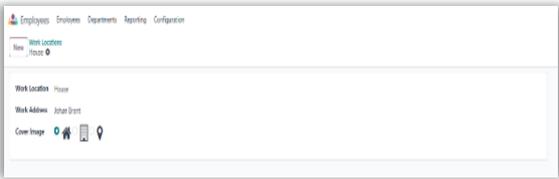
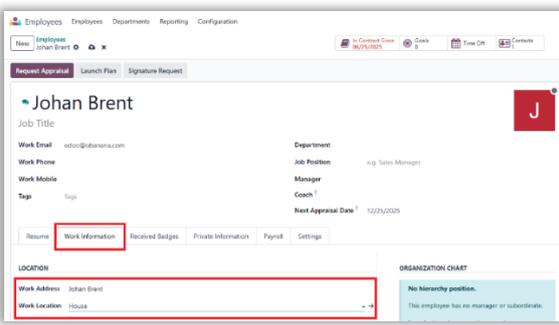
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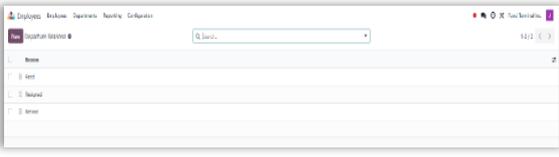
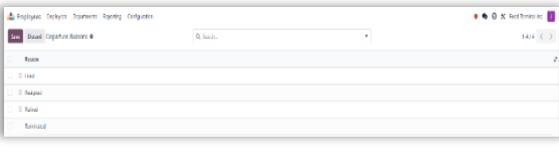
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WORK LOCATIONS

<p>To add:</p> <ol style="list-style-type: none"> 1. Open the Employees > Configure > Click Work Locations. 2. Click New. 	
<ol style="list-style-type: none"> 3. Enter the Work location and Address (Choose cover image). 4. Save manually. 	
<p>To edit:</p> <ol style="list-style-type: none"> 1. Open an existing work location. 2. Make the changes. 3. Save manually. 	
<p>To assign:</p> <ol style="list-style-type: none"> 5. Go to an employee's profile. 6. Under Work Information, select the Work Location. 7. Choose Work Address and Work Location in dropdown menu. 8. Save manually. 	

DEPARTURE REASONS

<p>To add:</p> <ol style="list-style-type: none"> 1. Open the Employees > Configure > Departure Reasons. 2. Click New. 	
<ol style="list-style-type: none"> 3. Enter new departure reason. 4. Click Save Button. 	



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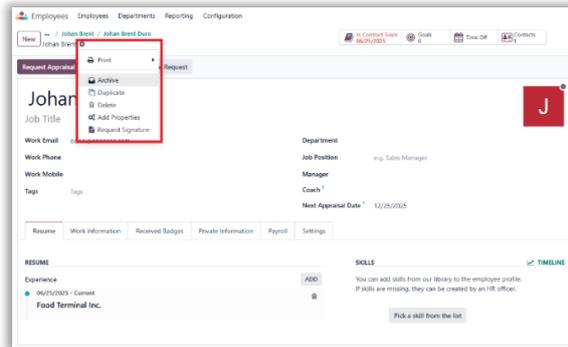
To edit:

- Click an existing departure reason.
- Click **Save** Button.

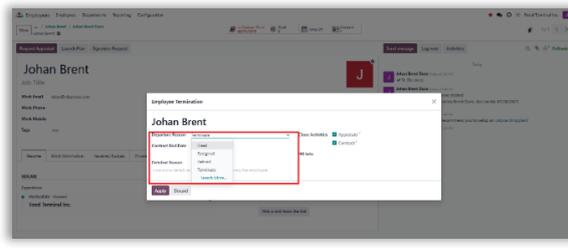


To assign:

- Go to an employee's profile.
- Click **Action** button and select **Archive**.



- Choose a **Departure Reason**.
- Click **Apply**.



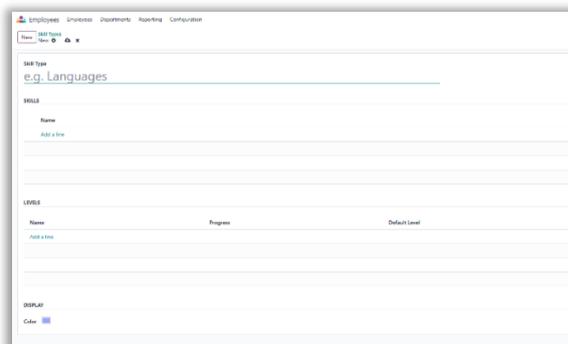
SKILL TYPES

To add:

- Open the **Employees > Configure > Skill Types**.
- Click **New**.



- Under Skill Type, choose a category such as:
 - Languages** (e.g., English, Spanish).
 - Soft Skills** (e.g., Leadership, Teamwork).
- Skill** from the dropdown.
- Select the **Skill Level**.
- Enter a new skill type
- Save Manually**.





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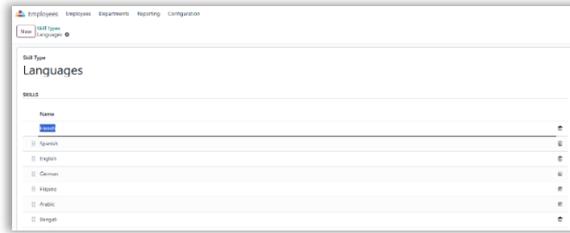
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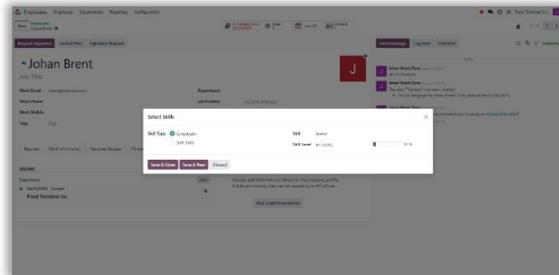
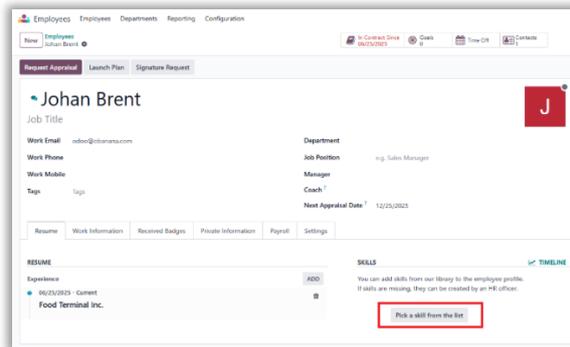
To edit:

8. Open an existing skill type.
9. Make changes.
10. **Save Manually to apply changes.**



To assign:

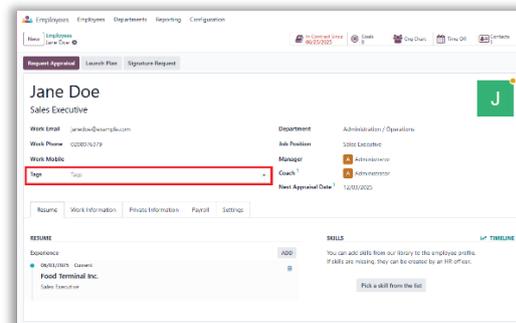
11. Go to an employee's profile.
12. Go to Resume tab
13. In the Skills section on the right, click **Pick a skill from the list.**
14. Under Skill Type, choose a category such as:
 - Languages (e.g., English, Spanish).
 - Soft Skills (e.g., Leadership, Teamwork).
15. After selecting the skill type, choose the specific **Skill** from the dropdown.
16. Select the Skill **Level.**
17. **Save & Close.**



TAGS

To add:

1. Open the **Employees** module.
2. Navigate **Tags** and click drop down menu.





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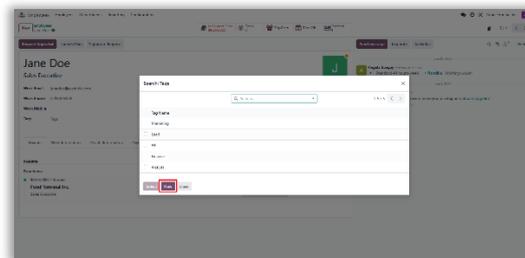
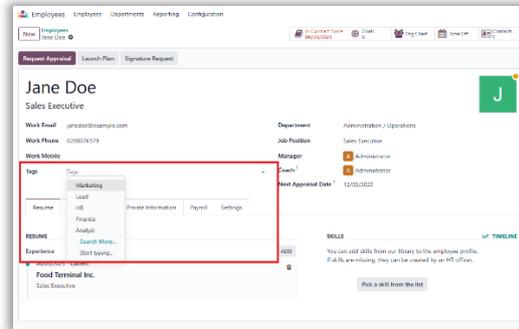
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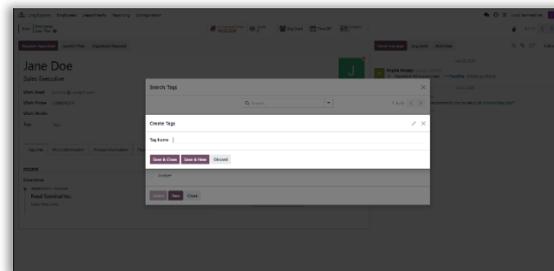
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Employee Management

3. Click **Search More**.
4. Click **New** button to add new tags.

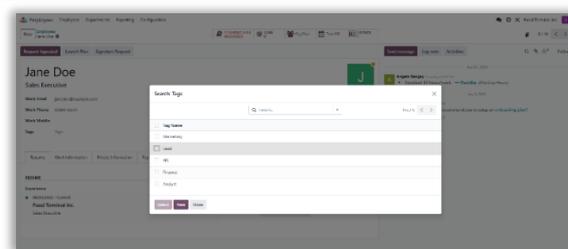


5. Create new **Tag Name**.
6. **Save & Close**.



To assign:

7. Choose an existing employee and open the **Employee Module**.
8. Navigate **Tags** and click drop down menu.
9. Click **Search More**.
10. Select tags by checking the box in the left side
11. Click **Select** button.





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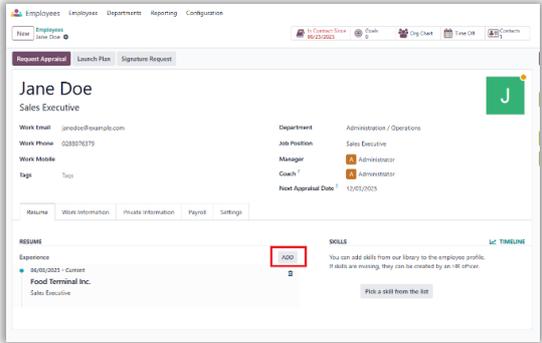
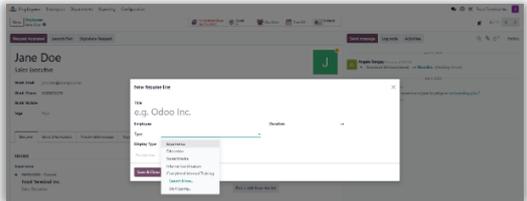
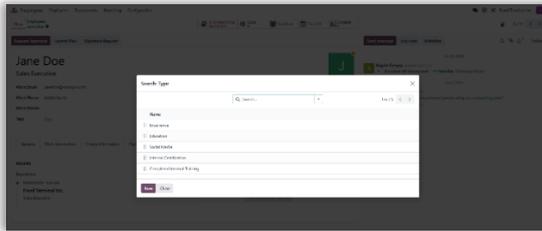
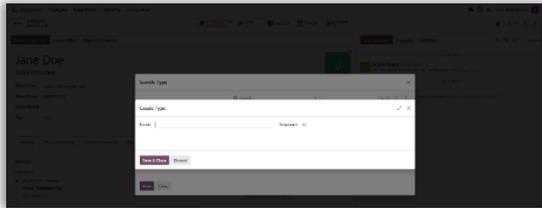
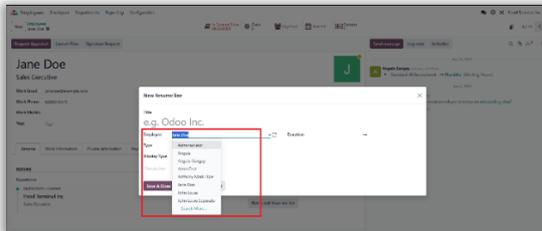
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RESUME LINE	
<ol style="list-style-type: none"> 1. Within an employee record, click the Resume tab. 2. Click Add button. 	
<p>To add:</p> <ol style="list-style-type: none"> 1. Navigate Types and click drop down menu. 	
<ol style="list-style-type: none"> 3. Click Search More. 4. Click New button to add new types 	
<ol style="list-style-type: none"> 5. Create new Tag Name. 6. Save & Close. 	
<p>To assign:</p> <ol style="list-style-type: none"> 7. Choose an existing employee and open the Employee Module. 8. Go to resume tab 9. Click Add button. 10. Navigate Employee and click drop down menu. 11. Choose employee to assign. 12. Save & Close. 	



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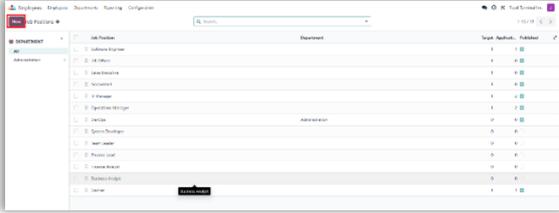
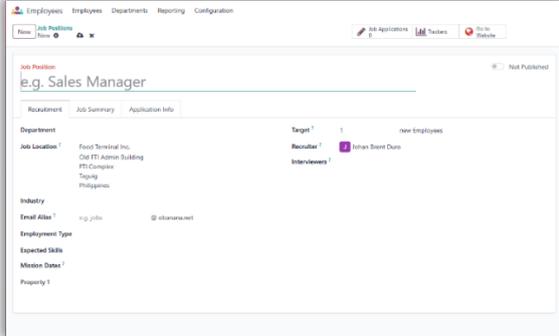
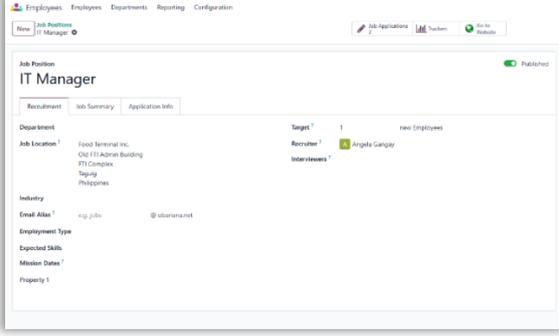
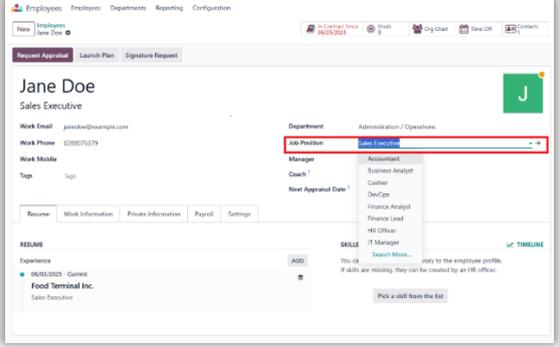
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Employee Management

3.9 Job Management

JOB POSITIONS	
<p>To add:</p> <ol style="list-style-type: none"> Open the Employees > Configure > Job Positions Click New button to create new job position. 	
<ol style="list-style-type: none"> Enter the Job Title, Department, and other related details. Save manually. 	
<p>To edit:</p> <ol style="list-style-type: none"> In the list of Job Positions, select the one you want to update. Click Edit, make the necessary changes. Save Manually. 	
<p>To assign:</p> <ol style="list-style-type: none"> Go to the Employees module. Open the employee's profile. Under the Job Position field, select the appropriate job from the dropdown list. Save manually. 	



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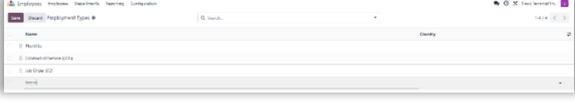
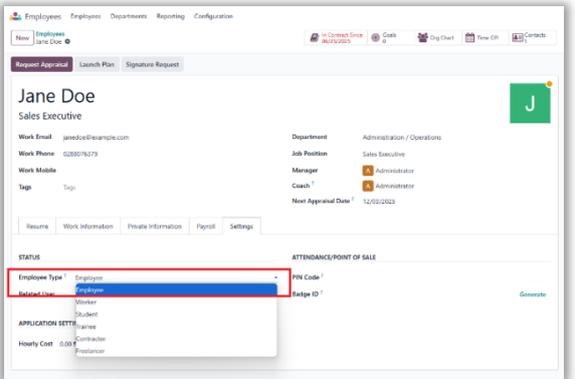
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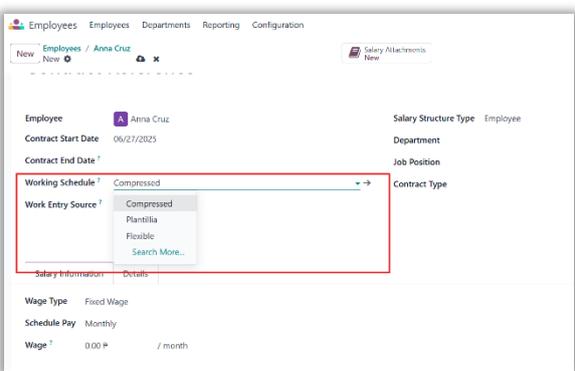
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Employee Management

EMPLOYMENT TYPE

<p>To add:</p> <ol style="list-style-type: none"> 1. Open the Employees > Configure > Employment Type 2. Click New button to create new employment type. 	
<ol style="list-style-type: none"> 3. Enter the employment type. 4. Save. 	
<p>To edit:</p> <ol style="list-style-type: none"> 4. In the list of employment type, select the one you want to update. 5. Click make the necessary changes. 6. Click Save. 	
<p>To assign:</p> <ol style="list-style-type: none"> 7. Go to the Employees module. 8. Open the employee's profile. 9. Click the Settings tab. 10. In the Employment Type field, select the appropriate type from the dropdown. 11. Save manually. 	

WORKING SCHEDULE

<ol style="list-style-type: none"> 1. Navigate to Employees > Configuration > Working Schedule 2. Click the Create button. In the form: <ul style="list-style-type: none"> • Name: Enter a descriptive name (e.g., "Standard 40 Hours/Week"). • Company: Select the applicable company. • Average Hours per Day: Input the average daily working hours (e.g., 8). 	
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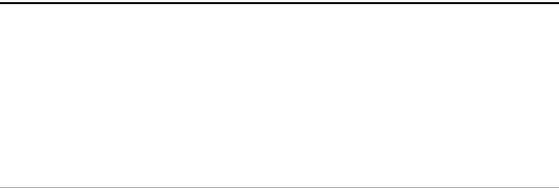
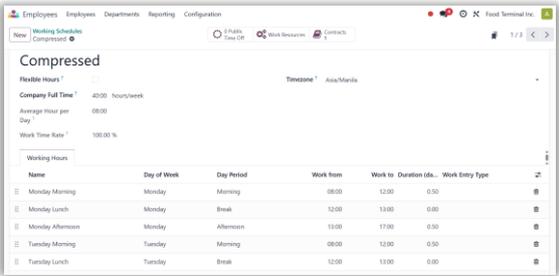
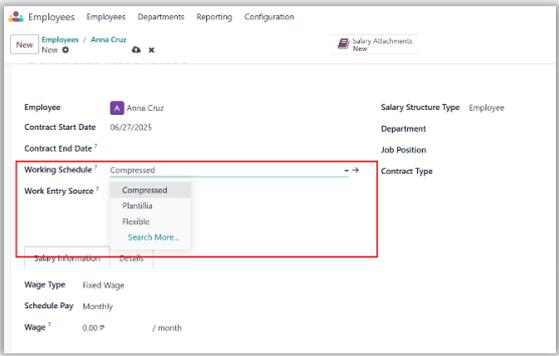
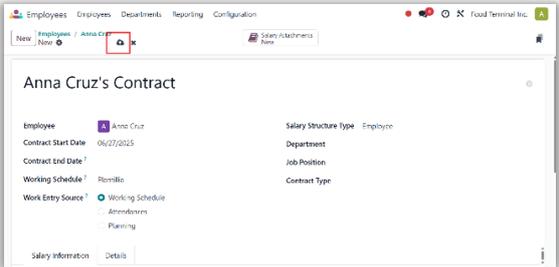
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<ul style="list-style-type: none"> • Timezone: Choose the appropriate timezone. 																																											
<p>Define Working Hours</p> <ol style="list-style-type: none"> 1. Under the Working Hours tab, click Add a Line for each workday: <ul style="list-style-type: none"> • Day of Week: Select the day (e.g., Monday). • Day Period: Choose 'Morning', 'Afternoon', or 'Full Day'. 2. Work From and Work To: Specify the start and end times (e.g., 09:00 to 17:00). 3. Work Entry Type: Select the type (e.g., Attendance). 4. After entering all necessary information, click Save to store the schedule. 	 <table border="1"> <thead> <tr> <th>Name</th> <th>Day of Week</th> <th>Day Period</th> <th>Work from</th> <th>Work to</th> <th>Duration (d.s.)</th> <th>Work Entry Type</th> </tr> </thead> <tbody> <tr> <td>Monday Morning</td> <td>Monday</td> <td>Morning</td> <td>08:00</td> <td>12:00</td> <td>0:50</td> <td>⊞</td> </tr> <tr> <td>Monday Lunch</td> <td>Monday</td> <td>Break</td> <td>12:00</td> <td>13:00</td> <td>0:00</td> <td>⊞</td> </tr> <tr> <td>Monday Afternoon</td> <td>Monday</td> <td>Afternoon</td> <td>13:00</td> <td>17:00</td> <td>0:50</td> <td>⊞</td> </tr> <tr> <td>Tuesday Morning</td> <td>Tuesday</td> <td>Morning</td> <td>08:00</td> <td>12:00</td> <td>0:50</td> <td>⊞</td> </tr> <tr> <td>Tuesday Lunch</td> <td>Tuesday</td> <td>Break</td> <td>12:00</td> <td>13:00</td> <td>0:00</td> <td>⊞</td> </tr> </tbody> </table>	Name	Day of Week	Day Period	Work from	Work to	Duration (d.s.)	Work Entry Type	Monday Morning	Monday	Morning	08:00	12:00	0:50	⊞	Monday Lunch	Monday	Break	12:00	13:00	0:00	⊞	Monday Afternoon	Monday	Afternoon	13:00	17:00	0:50	⊞	Tuesday Morning	Tuesday	Morning	08:00	12:00	0:50	⊞	Tuesday Lunch	Tuesday	Break	12:00	13:00	0:00	⊞
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Tuesday Morning	Tuesday	Morning	08:00	12:00	0:50	⊞																																					
Tuesday Lunch	Tuesday	Break	12:00	13:00	0:00	⊞																																					
<p>Assign the Working Schedule to Employees</p> <ol style="list-style-type: none"> 5. Navigate to the Employees app. 6. Open the employee's record. 7. Under the Contracts tab, either create a new contract or edit an existing one. 																																											
<ol style="list-style-type: none"> 8. In the contract form: <ul style="list-style-type: none"> • Working Schedule: Select the schedule you just created. 9. Complete other contract details as required. 10. Click Save to apply the changes. 																																											



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4. Glossary of Terms

Term	Definition
Activity Plan	A predefined set of tasks or workflows assigned to employees to guide onboarding, development, or other HR-related processes.
Archive	The action of deactivating or removing an employee record from active status, often used when employees leave the organization.
Badge	A visual recognition given to an employee for achievements or participation in activities, usually through challenges.
Configuration	The system area used to define and customize data structures such as skill types, work locations, and employment types.
Contract	A formal document stored in the system outlining employment terms such as position, type, salary, and duration.
Contract Type	A classification that defines the nature of an employment agreement (e.g., full-time, part-time, project-based).
Dashboard	The main interface of the system where users can navigate modules and access system functions.
Department	An organizational unit where employees are grouped based on function or hierarchy, used for structuring teams.
Departure Reason	A recorded reason for an employee's separation from the company, such as resignation, termination, or end of contract.
Employee Management	The comprehensive process of creating, maintaining, and updating employee records and information within the HR system.
Employee Profile	A detailed digital record of an employee that includes personal information, job details, contracts, skills, and history.
Employment Type	The classification that defines the nature or basis of an employee's job (e.g., regular, seasonal, project-based).
HR System	A platform used for managing all aspects of human resources, including personnel data, contracts, training, and performance.
Job Position	A defined title or role assigned to an employee within the organization (e.g., Software Engineer, HR Officer).



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Manager	An employee who has supervisory responsibilities over other employees and appears in the organizational hierarchy.
Module	A functional section of the HR system that groups related features, such as Employees, Contracts, or Recruitment.
Organizational Chart	A graphical representation showing the hierarchy and reporting structure within a company.
Recruitment Module	The section of the system used to create, manage, and assign job positions during hiring.
Resume Tab	A section of the employee profile used to document work experience, training, and skills.
Skill	A specific capability, talent, or area of knowledge that can be assigned to an employee profile.
Skill Type	A category under which skills are grouped (e.g., Technical Skills, Soft Skills, Languages).
Tag	A demo version of the system used for practice, training, or testing without affecting live data.
Test URL	A defined set of working hours and days assigned to an employee, including shift details and weekly total: https://test-fti.obanana.net/
Working Schedule	A defined set of working hours and days assigned to an employee, including shift details and weekly totals.



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5. Approvals

Position	Name of Approver	Approval Signature	Date (DD/MMM/YYYY)
Project Manager	Bryan Del Rosario		
Operation Manager	Erwin Galang		
Human Resource Officer	Ma. Deborah Perez		
Information System and Data Officer	Joann Carla V. Corpuz		