PeoplesHR

Standard Reports Catalog

A guide to the purpose, use and audience of every standard report.

Version 3.0

November 2026

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Standard Reports Catalog

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1. Introduction

PeoplesHR is a leading Human Capital Management (HCM) software solution that digitalises the entire employee lifecycle, from recruitment to retirement. It enables organisations to streamline and automate HR processes, enhance employee experiences, and leverage actionable insights to support informed decision-making.

1.1 Purpose

This Catalog describes the standard reports available across the HCM modules. For every report it states what the report shows, the business question it answers, when to use it, who normally uses it and how often. It is intended to help users find the right report quickly without needing a detailed specification.

1.2 Scope

The Catalog contains 136 standard reports across 15 module groups: Employee Information Manager, Absence Management, Time & Attendance, Employee Life Cycle, Recruitment, Payroll, Payroll (Philippines specific), Payroll (Indonesia specific), Payroll (Sri Lanka statutory), Loan Management, Performance Management, Training & Development, Manpower Planning, Disciplinary Management and System Administration. The five standard letter templates are described in Section 6. Reports planned for future releases are listed separately in Section 7.

1.3 Who this is for

User group	How the Catalog helps
HR professionals	Find reports for probation, movements, separations, recruitment and employee records.
Line managers	Find team-level views of attendance, leave, overtime and performance.
Payroll teams	Find pre-payroll checks, reconciliations, bank and cash lists, tax and statutory reports.
System administrators	Find workflow monitoring reports and the reports used for data correction.
HR leadership and management	Find workforce composition, planning, movement and performance summaries.
Finance and compliance	Find payroll summaries, loan reconciliation, training cost and gratuity reports.

2. How to Use This Catalog

2.1 Information given for each report

Field	Meaning
Report ID	Unique reference made of the module code and a sequence number, for example PAY-03.
Report	The name of the report.
What it shows	A plain-language description of the report content.
Business question	The question a user can answer by running the report.
When to use it	Typical moments or events that call for the report.
Primary users	The user groups who normally run or consume the report.

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Field	Meaning
Frequency	How often the report is typically run: daily, weekly, monthly, per pay cycle, quarterly, annual, on-demand or event-driven.
Report type	Operational, Analytical, Strategic, Statutory or Control & Audit.
Criticality	High, Medium or Low.

2.2 Report types

Type	Definition
Operational	Supports day-to-day execution of HR and payroll tasks.
Analytical	Shows patterns and breakdowns to support decisions.
Strategic	Leadership view of trends, cost, risk and planning.
Statutory	Prepared for government or regulator submission.
Control & Audit	Checks, exceptions and evidence that processes are working.

2.3 Criticality

Level	Definition
High	Needed to run or control a core cycle such as payroll, statutory filing, probation or approvals, or to support leadership decisions.
Medium	Used regularly for management and planning.
Low	Reference or occasional-use report.

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3. Catalog Overview

The Catalog contains 136 reports. The table shows the number of reports and the focus of each module group.

Module	Reports	Focus
Employee Information Manager	18	Workforce records, composition, probation, service and separations
Absence Management	3	Leave status, pending approvals and balances
Time & Attendance	10	Daily attendance, overtime, rosters, shifts and timesheets
Employee Life Cycle	7	Promotions, transfers and movement applications
Recruitment	6	Vacancies, applicants, interview panels and process status
Payroll	14	Pay slips, reconciliations, bank and cash payments, tax and increments
Payroll - Philippines specific	16	Philippines payroll, tax, contributions, loans and leave conversion
Payroll - Indonesia specific	11	Indonesia tax withholding and BPJS TK reporting
Payroll - Sri Lanka Statutory	9	Sri Lankan statutory tax, gratuity and stamp duty reporting
Loan Management	5	Loan summaries, reconciliation and outstanding balances
Performance Management	19	Goals, appraisals, competencies and feedback
Training & Development	9	Training history, cost, needs and attendance
Manpower Planning	4	Approved cadre, plan changes and deficits
Disciplinary Management	4	Disciplinary incidents, proceedings and trends
System Administration & Compliance	1	Workflow approvals across modules
Total	**136**	

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4. Reports by Module

4.1 Employee Information Manager

Core reports on who our people are, how long they have served and where they sit, together with probation tracking and separation lists.

ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
EIM-01	**Employee Summary Report**	Lists key details of all active employees (name, designation, department, grade, join date, status).	Who is on our active roll right now, and in what role?	Headcount verification, month-end roll check, quick management queries.	HR, Managers, HR Head	On-demand High criticality Operational
EIM-02	**Employee Profile Report**	Complete single-employee record: personal, dependants, qualifications, movements, leave, work experience and address. Section selector lets the user print only what is needed.	What is the full record we hold for this employee?	Onboarding file checks, audits, promotion / transfer reviews, file closure on exit.	HR, Audit	On-demand High criticality Operational
EIM-03	**Consolidated Employee Summary Dashboard**	Management view of workforce composition: gender mix, cadre by corporate title, service analysis and age analysis with charts.	What does our workforce look like and is it balanced?	Board / management packs, annual HR review, workforce planning discussions.	HR, HR Head	Quarterly High criticality Strategic
EIM-04	**Staff Directory**	Internal directory showing names, designations, departments and work contact details.	Who is who, and how do I reach them?	Intranet publishing, new-joiner orientation, cross-team coordination.	All staff	On-demand Low criticality Operational
EIM-05	**Employee Contact Details**	HR-only report of full contact information (phone, email, residential and communication addresses).	How do we reach this employee outside work channels?	Official notices, payroll queries, business continuity calls.	HR, Payroll	On-demand Medium criticality Operational
EIM-06	**Emergency Contact Details**	Lists each employee with next-of-kin / emergency contact details.	Who do we call if something happens to this employee?	Safety drills, incident response, annual data-validation campaign.	HR, Audit	Annual High criticality Control & Audit

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ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
EIM-07	**Employee Relationships & Dependants Details**	Details of employee relationships and dependants (spouse, children, parents) with their key details.	Which family members are on record for benefits, insurance or nominations?	Medical insurance enrolment, benefit eligibility checks, EPF / gratuity nomination checks.	HR, Payroll	On-demand Medium criticality Operational
EIM-08	**Designation Wise Statistics**	Headcount by designation, showing how many employees hold each designation, optionally by department or grade.	Where are our role concentrations, and which designations are thin?	Org design reviews, grading exercises, vacancy and cadre discussions.	HR, HR Head	Quarterly Medium criticality Analytical
EIM-09	**Birthday Report**	Employee birthdays grouped by date within a chosen period.	Whose birthday is coming up?	Monthly engagement and recognition activities.	HR, Managers	Monthly Low criticality Operational
EIM-10	**Age Analysis Report**	Age-band summary with pie chart and drill-down to individual ages, categorised by department.	What is our age profile and are we exposed to retirement waves?	Succession planning, retirement forecasting, workforce strategy.	HR, HR Head	Annual Medium criticality Analytical
EIM-11	**Service Analysis Report**	Service-range summary with pie chart and drill-down to individual service length.	How experienced and how stable is our workforce?	Retention analysis, long-service planning, benefits review.	HR, HR Head	Annual Medium criticality Analytical
EIM-12	**Service Milestone Report**	Employees completing a specified number of years of service within a selected period.	Who is reaching a service milestone that needs recognition or a benefit?	Long-service awards, gratuity eligibility checks (5 years), milestone communications.	HR, Payroll	Monthly Medium criticality Operational
EIM-13	**Pending Confirmations Report**	Employees whose probation / confirmation is pending (and overdue) as of the run date.	Whose probation is due or overdue for a confirmation decision?	Monthly probation tracking; trigger Confirmation Letters; manager reminders.	HR, Managers, HR Head	Monthly High criticality Control & Audit

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ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
EIM-14	**Employee Joining Statistics**	Employees who joined within a specified period.	How many people did we hire and who joined?	Onboarding workload planning, hiring-vs-plan checks, new joiner payroll cut-off.	HR, Payroll, HR Head	Monthly Medium criticality Operational
EIM-15	**Resignations & Separations List**	Employees who resigned or separated in a period, with last working day and separation type.	Who has left, when, and why?	Exit clearance, final settlement, headcount reconciliation, attrition input.	HR, Payroll, HR Head	Monthly High criticality Operational
EIM-16	**Previous Working Experience**	Prior work experience for a selected employee or group.	What relevant experience does this person bring?	Grading, internal talent search, role matching.	HR	On-demand Low criticality Operational
EIM-17	**Employee Qualification Register**	Register of qualifications held by employees.	Which qualifications and skills do we have, and where are the gaps?	Grading and promotion checks, training planning, skills inventory.	HR, HR Head	Annual Medium criticality Analytical
EIM-18	**Professional Body Membership Statistics**	Membership statistics by professional body (e.g. CIMA, CA, IESL).	Which professional bodies do our people belong to and are fees / certifications current?	Fee reimbursement, certification tracking, employer-brand reporting.	HR, Finance	Annual Low criticality Analytical

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4.2 Absence Management

Leave utilisation, pending leave requests and leave balances by department.

ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
ABS-01	**Employee Leave Status Details**	Leave taken per active employee, grouped by department, for a chosen leave year.	How much leave is each team taking?	Mid-year / year-end leave review, leave policy compliance.	HR, Managers, HR Head	Monthly High criticality Operational
ABS-02	**Employee Pending Leave Details**	Pending (unapproved) leave requests for active employees by department in the current leave year.	Which leave requests are waiting for approval?	Weekly approval chasing; month-end clean-up before payroll cut-off.	HR, Managers, Payroll	Weekly High criticality Control & Audit
ABS-03	**Employee Leave Balance Summary**	Leave utilisation and remaining balances for all active employees in the current leave year.	How much leave does each employee have left?	Planning leave, year-end carry-forward, encashment decisions.	HR, Managers, All staff	Monthly High criticality Operational

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4.3 Time & Attendance

Daily attendance control and period reports that support payroll: overtime, rosters, shift adjustments and timesheets.

ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
TNA-01	**Daily Attendance Report**	Attendance for a selected date, with a status filter (present, late, absent, on leave).	Who is in, who is late and who is absent today?	Daily operations check; shift supervisors; headcount at site.	HR, Managers	Daily High criticality Operational
TNA-02	**Daily Late Report**	Employees who arrived late on a date, with late minutes.	Who was late and by how much?	Daily discipline control; input for late deductions.	HR, Managers	Daily Medium criticality Operational
TNA-03	**Daily Absence & Leave Report**	Employees absent on a date, showing whether it is on approved leave or unexplained.	Who is absent without leave and who is covered by approved leave?	Daily follow-up on unexplained absence; absent marking before payroll.	HR, Managers	Daily High criticality Operational
TNA-04	**Individual Attendance Report**	Attendance details for individual employee(s) for a date / period.	What is this person's attendance record?	Disciplinary reviews, attendance queries, appraisal evidence.	HR, Managers	On-demand Medium criticality Operational
TNA-05	**Invalid Attendance (Missed Punch) Report**	Employees with invalid or missing in / out punches for a date.	Whose attendance data needs correction before payroll?	Daily clean-up; essential before pay-period lock.	HR, Managers, Payroll	Daily High criticality Control & Audit
TNA-06	**Overtime Details Report**	Overtime hours and values grouped by overtime type.	How much overtime was worked and of what type?	Payroll input check, overtime cost control.	HR, Managers, Payroll	Per pay cycle High criticality Operational
TNA-07	**Overtime Reasons Report**	Overtime hours grouped by reason and roster.	Why is overtime happening?	Root-cause review of overtime; staffing decisions.	Managers, HR Head	Monthly Medium criticality Analytical

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ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
TNA-08	**Roster Schedules Report**	Roster schedules for a selected roster group for a month.	Who is working which shift this month?	Shift planning and publishing rosters.	HR, Managers	Monthly Medium criticality Operational
TNA-09	**Shift Adjustment Report**	Shift adjustments for a business unit within a period.	Which shifts were changed and by whom?	Payroll shift allowance verification; control of roster changes.	HR, Managers, Payroll	Per pay cycle Medium criticality Control & Audit
TNA-10	**Timesheet Report**	Timesheets for a business unit for a period.	How many hours did each employee work?	Pay-period validation, project / client costing.	HR, Managers, Payroll	Per pay cycle High criticality Operational

4.4 Employee Life Cycle

Promotions, transfers and other movements, with views of applications still awaiting approval.

ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
ELC-01	**Employee Promotion Details**	All promotions in a selected period with old / new designation and grade.	Who was promoted, when and to what?	Promotion cycle review, letter generation, pay revision check.	HR, Payroll, HR Head	Annual High criticality Operational
ELC-02	**Employee Transfer Details**	Employee movements by division for a selected movement type.	Who moved between divisions or locations?	Transfer tracking, cost-centre updates, letter generation.	HR, Payroll, HR Head	Monthly Medium criticality Operational

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ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
ELC-03	**Movement Type Variation Graph**	Trend of different movement types (promotion, transfer, etc.) plotted together.	Is internal mobility rising or falling?	Talent mobility review, annual HR report.	HR, HR Head	Annual Medium criticality Strategic
ELC-04	**Pending Movement Applications**	Ongoing employee movement applications waiting for approval.	Which movements are stuck in the approval pipeline?	Weekly follow-up; month-end before payroll cut-off to catch late pay changes.	HR, Payroll	Weekly High criticality Control & Audit
ELC-05	**Application Details by Stage & Type**	Applications at a selected processing stage for a selected application type.	How many applications are at each stage?	Process monitoring and bottleneck identification.	HR	On-demand Low criticality Operational
ELC-06	**Application History (Short-listed)**	History of short-listed applications for a selected application type.	What happened to applications that reached short-list?	Audit trail, feedback to applicants, process review.	HR	On-demand Low criticality Control & Audit
ELC-07	**Movement Changes by Employee & Type**	Applications made by a selected employee for a selected stage and type (initial, short-list, assessment).	What movement applications has this employee made and where do they stand?	Individual career review; employee queries.	HR, Managers	On-demand Low criticality Operational

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4.5 Recruitment

Vacancy, applicant and interview-process reports for recruitment teams and hiring managers.

ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
REC-01	**Applicant Details by Position**	Applicants for a selected position.	Who has applied for this role?	Shortlisting; candidate review.	HR	On-demand High criticality Operational
REC-02	**Business Unit Vacancies**	Open vacancies in a selected business unit.	What roles are we hiring for in this unit?	Weekly vacancy review; hiring-plan tracking.	HR, Managers, HR Head	Weekly High criticality Operational
REC-03	**Interview Panel & Member Details**	Panel composition with member details and which panels each member sits on.	Who is on which interview panel?	Scheduling interviews; managing panelist workload.	HR	On-demand Low criticality Operational
REC-04	**Interview Process Statistics**	Applicant status per selected vacancy (applied, shortlisted, interviewed, offered, rejected).	Where is each vacancy in the funnel?	Weekly recruitment status meeting.	HR, Managers	Weekly High criticality Operational
REC-05	**Interview Profile Details**	Details of a selected interview profile (competencies, questions, criteria).	What are we assessing for this interview?	Interviewer preparation; standardisation.	HR	On-demand Low criticality Operational
REC-06	**Vacancy Recruitment Stage Details**	Status for a recruitment stage for a selected vacancy.	Who is stuck in a particular stage?	Bottleneck identification; candidate follow-up.	HR	Weekly Medium criticality Operational

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4.6 Payroll

Reports organised around the payroll cycle: pay slips, reconciliations, exception checks, bank and cash payment lists and tax reporting.

ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
PAY-01	**Pay Slip**	Employee pay slip for a selected pay period, with a layout option (net and gross in one column, or gross-based).	What was paid, and what was deducted?	Pay-day distribution, employee queries, bank / visa letters.	Payroll, All staff	Per pay cycle High criticality Operational
PAY-02	**Annual Pay History**	Pay summary per employee over a selected period.	What has this employee earned over the year?	Salary letters, tax reconciliation, audit queries.	HR, Payroll, Finance	Annual Medium criticality Operational
PAY-03	**Payroll Grand Summary**	Grand totals of salaries and transactions in base currency for a single pay period or a date range.	What is our total payroll for the period?	Payroll sign-off, finance reconciliation, management reporting.	Payroll, HR Head, Finance	Per pay cycle High criticality Control & Audit
PAY-04	**Pay Sheet Currency Wise**	Hierarchy-level transaction amounts per currency, with employee-wise totals.	How does payroll break down by currency and hierarchy?	Multi-currency payroll validation.	Payroll, Finance	Per pay cycle Low criticality Operational
PAY-05	**Monthly Basic Salary Reconciliation**	Month-on-month reconciliation of total basic salary, explaining movement (joiners, leavers, increments).	Why did total basic salary change from last month?	Payroll review before approval.	Payroll, Finance, Audit	Per pay cycle High criticality Control & Audit
PAY-06	**Monthly Bank & Cash Summary**	Amounts paid by bank transfer and by cash, by company and employee.	How much do we pay via bank and via cash?	Bank file validation, cash-handling preparation.	Payroll, Finance	Per pay cycle High criticality Operational
PAY-07	**Bank Signature List**	Bank transactions list for employee signature or approval.	What do we need approved before sending the bank file?	Authorisation sign-off before release.	Payroll, Finance	Per pay cycle Medium criticality Control & Audit

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ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
PAY-08	**Cash Signature List**	Cash payment list with employee signature column.	Who has received their cash pay?	Cash payment day; audit evidence.	Payroll	Per pay cycle Medium criticality Control & Audit
PAY-09	**Bank Account Reconciliation**	Bank reconciliation details for selected employee(s).	Does the bank credit match payroll for these employees?	Resolving failed or disputed credits.	Payroll, Finance	On-demand Medium criticality Control & Audit
PAY-10	**Negative Salary Exceptions**	Employees whose net salary is negative in a period.	Whose deductions exceed earnings?	Before approval; fix loans / advances scheduling.	HR, Payroll	Per pay cycle High criticality Control & Audit
PAY-11	**Tax Report**	Tax details for employees for a period and tax type.	How much tax was deducted and from whom?	Tax reconciliation and reporting.	Payroll, Finance, Audit	Monthly High criticality Statutory
PAY-12	**Salary Increments Report**	Salary increments by pay period and increment status (approved, pending, processed).	Who got an increment and what does it cost?	Increment cycle review, budget impact.	HR, Payroll, HR Head	Annual High criticality Operational
PAY-13	**Revision Pay Slip**	Changed amounts on a revised pay slip (arrears, back-pay, corrections) for a selected employee and revision.	What changed after the pay run was revised?	Explaining arrears or corrections to employees.	Payroll, All staff	On-demand Medium criticality Operational
PAY-14	**Statutory Contributions Detail (EPF)**	EPF employee and employer contribution amounts processed for a month.	How much EPF was deducted and contributed?	EPF returns, reconciliation.	Payroll, Finance, Audit	Monthly High criticality Statutory

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4.6.1 Payroll - Philippines specific

Report Name	Purpose of the Report
13th Month Report Format	This report confirms compliance with the mandatory 13th-month pay, equivalent to 1/12 of an employee's annual basic salary
1601C Report (BIR Form 1601-C)	Monthly Remittance Return of Income Taxes Withheld on Compensation.
2316 Reports (BIR Form 2316)	Certificate of Compensation Payment and Tax Withheld.
Alphalist Schedule 1	Part of the BIR Annual Information Return (Form 1604-C). List of employees subject to withholding tax on compensation
Alphalist Schedule 2	Also, part of BIR Form 1604-C, these lists employees exempt from withholding tax or with no tax withheld
Government - Tax	Refers to income tax withholding reported via BIR forms
Government - PAG-IBIG HDMF - Calamity Loan	Tracks employee calamity loan repayments, remitted via Pag-IBIG's MCRF
Government - PAG-IBIG HDMF - Salary Loan	Tracks employee salary loan repayments, remitted via Pag-IBIG's MCRF.
Government - PAG-IBIG	Reports monthly Pag-IBIG contributions (up to PHP 100 each) via MCRF.
Government - PHIC (PhilHealth)	Reports monthly PhilHealth contributions via RF-1, due within 20 days of the next month.
Government - SSS Calamity Loan	Tracks SSS calamity loan repayments, remitted via Form R-5 with contributions.
Government - SSS Salary Loan	Tracks SSS salary loan repayments, remitted via Form R-5 with contributions.
Government - SSS	Reports on monthly SSS contributions via Forms R-3 and R-5, due by the 10th.
GSIS Report	Details of GSIS contributions for public sector employees, submitted monthly
Leave Conversion - Individual Report	Details individual employee leave balances converted to cash, per company policy.
Leave Conversion - Summary Report	Summarizes leave encashment across employees for DOLE compliance audits.

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4.6.2 Payroll - Indonesia specific

Report Name	Purpose of the Report
SPT Masa Form 1721 Report	Generated monthly for selected tax year and contains a summary of employee data in the company. The company will submit the report to the government monthly
Bukti Pemotongan Bulanan Pegawai Tetap (BPMP)	Documents the withholding of income tax from employees' salaries.
Bukti Pemotongan A1 (BPA1)	Summary of the total income and withholding tax of employees for the year.
BPJS TK - template_tk_new	Registers newly joined employees in the BPJS TK system.
BPJS TK - template_DUTK	Provides monthly salary and wage details of employees to BPJS TK for the calculation of social security contributions.
BPJS TK - template_tk_lanjutan	Maintains and updates the records of employees who are already registered with BPJS TK.
BPJS TK - template_tk_na_resign	Deregisters employees who are resigning, retiring, or whose employment has otherwise ended (including due to death).
Report 21 (Monthly withholding Tax 21 Report)	Displays a summary of resident employees' details which includes employee information such as gross income, tax object code information, PTKP code etc.
Report 26 (Monthly withholding Tax 26 Report)	Displays a summary of non-resident employees' details which includes TIN, Address of the Income Recipient, Country Code, etc.
Report A1 (Annual withholding Tax A1 Report)	Displays a summary of the Annual Tax Details of all the employees.
BP21 report (BP21 Severance Report)	Declares income tax (PPh 21 Final) on severance, retirement benefits, or other lump-sum payments subject to final tax.

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4.7 Payroll - Sri Lanka Statutory

Country-specific reports for tax, gratuity and stamp duty. Customers should confirm current statutory formats with the relevant authorities.

ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
PSL-01	**T09 Report**	Income tax details for employees (available in all three languages).	What tax details do we need to report?	Statutory tax reporting.	Payroll, Audit	Annual High criticality Statutory
PSL-02	**T6 Report**	Bi-annual tax deduction details for a particular employee in each month (available in all three languages).	What tax was deducted for this employee in each month?	Statutory tax reporting and employee tax queries.	Payroll, Audit	Bi-annual High criticality Statutory
PSL-03	**T10 Report**	Bi-annual tax deduction details for a particular employee in each month (available in all three languages).	What tax was deducted for this employee in each month?	Statutory tax reporting and employee tax queries.	Payroll, Audit, All staff	Annual High criticality Statutory
PSL-04	**C Form Monthly**	Tax details of employer and employee for a given pay period.	What are the employer and employee tax details for this pay period?	Monthly statutory processing.	Payroll, Audit	Monthly High criticality Statutory
PSL-05	**Monthly PAYE Details**	PAYE tax details per employee in a period, in company currency with an option to show by currency.	How much PAYE was deducted this month?	Monthly APIT / PAYE remittance and reconciliation.	Payroll, Finance, Audit	Monthly High criticality Statutory
PSL-06	**Gratuity Eligibility Report**	Employees eligible for gratuity (more than 5 years' service) as of the run date.	Who is eligible for gratuity today?	Exit settlement; liability planning.	HR, Payroll, Finance	Monthly High criticality Statutory
PSL-07	**Stamp Duty Report**	Stamp duty on employee salaries for a period and tax type.	How much stamp duty was deducted?	Monthly payroll processing; statutory reporting.	Payroll, Audit	Monthly Medium criticality Statutory
PSL-08	**Stamp Duty Summary Report**	Total stamp duty paid in a period.	What is the total stamp duty for the period?	Reconciliation with the finance ledger.	Payroll, Finance	Monthly Low criticality Statutory

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ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
PSL-09	**Coin Summary Report**	Coin summary details of employees' salaries for a selected pay frequency, year and tax name.	What is the coin summary for the selected pay frequency and year?	Payroll processing for cash payments.	Payroll	Per pay cycle Low criticality Operational

4.8 Loan Management

Loan schemes, monthly recovery, reconciliation and outstanding balances.

ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
LOA-01	**Total Monthly Loan Summary**	Total loans for the organisation within a month, grouped by loan type, showing processed recoveries.	How much loan recovery happened this month?	Month-end finance reconciliation.	Payroll, Finance	Monthly High criticality Operational
LOA-02	**Monthly Loan Reconciliation**	Monthly reconciliation of loans by loan type.	Do loan balances and recoveries match?	Month-end close; audit.	Payroll, Finance, Audit	Monthly High criticality Control & Audit
LOA-03	**Loan Summary Report**	Active, inactive and pending loan details for a selected loan type.	What loans do we have under this scheme?	Scheme review.	HR, Payroll, Finance	Quarterly Medium criticality Operational
LOA-04	**Employee Loan Summary**	Complete loan history and balances for a selected employee.	What loans does this employee have and how much is left?	Loan applications, final settlement, employee queries.	HR, Payroll	On-demand High criticality Operational
LOA-05	**Loan Outstanding Report**	Processed loans with outstanding balances categorised by loan type.	What is outstanding and who owes it?	Cash-flow planning, balance-sheet reporting.	Payroll, Finance	Monthly High criticality Operational

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4.9 Performance Management

Evaluation reports for supervisors, HR and leadership, from individual goal and competency details to 360-degree feedback summaries.

ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
PER-01	**Annual Assessment Report**	Annual assessment details per employee.	How did this employee perform this year?	Appraisal discussions, promotion decisions.	HR, Managers, HR Head	Annual High criticality Operational
PER-02	**Annual Assessment by Supervisor**	Mid-year and annual ratings given by a selected supervisor.	Is this supervisor rating fairly and consistently?	Calibration, bias detection.	HR, HR Head	Annual High criticality Control & Audit
PER-03	**Competency Evaluation Details**	Competency evaluation for an employee (available once both parties have submitted).	How does this employee score on each competency?	Development planning.	HR, Managers	Annual Medium criticality Operational
PER-04	**Critical Incident Journal by Type**	Critical incidents for a selected incident type.	What kinds of incidents are recorded?	Pattern identification across teams.	HR, Managers	On-demand Low criticality Operational
PER-05	**Critical Incident Journal by Employee**	Critical incident journal entries for one employee.	What notable events support this employee's evaluation?	Evidence for appraisal.	Managers	On-demand Medium criticality Operational
PER-06	**Employees Assigned to Evaluation**	Employees assigned to a selected evaluation.	Who is included in this evaluation cycle?	Cycle set-up validation.	HR	On-demand Medium criticality Operational
PER-07	**Achievements Report**	All achievements recorded for an employee.	What has this employee accomplished?	Appraisal, recognition.	HR, Managers	On-demand Low criticality Operational

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ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
PER-08	**Misses Report**	Misses recorded for an employee.	Where did this employee fall short?	Coaching, appraisal.	HR, Managers	On-demand Low criticality Operational
PER-09	**Interests Report**	Interests submitted by an employee.	What career interests has this person declared?	Career conversations.	HR, Managers	On-demand Low criticality Operational
PER-10	**Evaluation Details**	Evaluations in the system, with a status filter for ongoing evaluations.	Which evaluations exist and which are still running?	Cycle monitoring.	HR	Weekly Medium criticality Operational
PER-11	**Form Submission Status**	Status of forms submitted by employees (submitted, pending, overdue).	Who has not submitted their forms?	Chasing completions during a cycle.	HR, Managers	Weekly High criticality Control & Audit
PER-12	**Goal Planning Details**	Goal planning details for an employee (both parties must have submitted).	What goals were agreed?	Start-of-year goal sign-off.	HR, Managers	Annual Medium criticality Operational
PER-13	**Goal Evaluation Details**	Goal results and goal-group weightages for an employee.	How did the employee do against goals, and how were they weighted?	Year-end appraisal.	HR, Managers	Annual High criticality Operational
PER-14	**Mid-Year Review Details**	Mid-year review details for an employee.	Are they on track mid-year?	Mid-year check-in.	HR, Managers	Annual Medium criticality Operational
PER-15	**Rating Details & Training Needs**	Ratings with training needs based on goal evaluation results for a completed evaluation.	Which training needs arise from the ratings?	Feeding the Training Needs Analysis.	HR, HR Head	Annual Medium criticality Analytical

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ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
PER-16	**Competency Group Summary**	Graphical comparison of functional vs core competencies across evaluator levels.	Where are we strong or weak across competency groups?	Development planning.	HR, Managers	Annual Medium criticality Analytical
PER-17	**Group-wise Assessment Participation Summary**	Planned vs actual assessment participation by level (peer, self, etc.).	Did everyone participate in the 360 exercise?	360-degree cycle completion.	HR	Annual Low criticality Control & Audit
PER-18	**Individual Competency Assessment Report**	Graphical comparison of feedback categories for an employee.	How do others see this person?	360-degree feedback sessions.	HR, Managers	Annual Medium criticality Analytical
PER-19	**Self vs Others Feedback Summary**	Compares self-evaluation with other categories for an employee.	Is there a gap between self-view and others' view?	Coaching, awareness building.	HR, Managers	Annual Medium criticality Analytical

4.10 Training & Development

Training needs, delivery, attendance, cost and employee training history.

ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
TND-01	**Annual T&D Expenditure and Days**	Annual training spend and number of training days per month.	How much did we spend on training and how many days?	Year-end report, budget planning.	HR, HR Head, Finance	Annual High criticality Analytical

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ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
TND-02	**Employee Training History**	All training attended by an employee.	What training has this employee received?	Career reviews, promotions, audits.	HR, Managers	On-demand Medium criticality Operational
TND-03	**Employees Trained by Subject**	Employees trained in a period, categorised by subject.	Who is trained on what?	Skill-coverage checks.	HR, HR Head	Quarterly Medium criticality Analytical
TND-04	**Program Register**	Attendance register for a programme for participant signatures.	Who attended this session?	Training day; evidence for audits.	HR	Event-driven Medium criticality Control & Audit
TND-05	**Training Attendance Analysis**	Number nominated, registered and present for a course.	How well is attendance on our courses?	Programme effectiveness review.	HR, HR Head	Monthly Medium criticality Analytical
TND-06	**Training Cost per Employee**	Per-head cost for trainings in a period.	What is our cost per participant?	Cost control, vendor selection.	HR, Finance	Quarterly Medium criticality Analytical
TND-07	**Training Needs by Department**	Training needs requested, by department.	What does each department need?	Annual training plan.	HR, HR Head	Annual High criticality Strategic
TND-08	**Training Needs Summary**	Count of requests for each training need.	Which training topics are most demanded?	Prioritising the training calendar.	HR, HR Head	Annual High criticality Strategic
TND-09	**Mandatory Training Due & Overdue**	Employees yet to complete required training.	Who has not completed their compulsory training?	Compliance follow-up.	HR, Managers, Audit	Monthly High criticality Control & Audit

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4.11 Manpower Planning

Division-wise cadre planning, change requests, plan versions and deficits.

ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
MPP-01	**HR Plan - Cadre Budget**	Division-wise budgeted cadre for a year.	How many people are we approved to have?	Annual budgeting.	HR, HR Head, Finance	Annual High criticality Strategic
MPP-02	**HR Plan - Change Requests & Status**	Change requests to the HR plan with their approval status by division.	Which cadre changes are pending or approved?	Mid-year plan revisions.	HR, HR Head	Quarterly Medium criticality Control & Audit
MPP-03	**HR Plan - Version History**	Version history of the HR plan by division.	How has the plan changed over time?	Audit trail.	HR, HR Head, Audit	Annual Low criticality Control & Audit
MPP-04	**HR Plan - Deficit vs Prior Year**	Division-wise HR deficit, comparing last year and current year.	Where have our gaps grown or shrunk?	Recruitment prioritisation.	HR, HR Head	Annual High criticality Strategic

4.12 Disciplinary Management

Open and completed incidents, proceedings and trends.

ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
DIS-01	**Ongoing Disciplinary Incidents**	Disciplinary incidents pending approval or in progress.	What cases are open?	Weekly case review.	HR, HR Head	Weekly High criticality Control & Audit

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ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
DIS-02	**Completed Disciplinary Incidents**	Completed incidents from a selected date to the run date, grouped by incident type or by action taken.	What types of incidents and actions have we seen?	Quarterly trend review; policy review.	HR, HR Head	Quarterly Medium criticality Analytical
DIS-03	**Disciplinary Proceedings**	Details of a selected incident for an employee.	What happened and what was decided?	Legal / tribunal preparation; employee queries.	HR, Audit	On-demand High criticality Control & Audit
DIS-04	**Disciplinary Trend by Period**	Graph of incidents by period (year, quarter, etc.).	Is misconduct rising or falling?	Management review.	HR, HR Head	Quarterly Medium criticality Strategic

4.13 System Administration & Compliance

Reports that support administrators in monitoring workflow across modules.

ID	Report	What it shows	Business question	When to use it	Primary users	Frequency / criticality / type
ADM-01	**Pending Workflow Approvals**	Pending approvals across all modules, grouped by approval type and approver.	Where is work stuck, and with whom?	Weekly sweep; before payroll cut-off.	HR, Payroll, Admins	Weekly High criticality Control & Audit

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5. Quick Guide by User Group

The reports below are a recommended starting set for each user group.

HR professionals

Report	Business question	Frequency	Criticality	Module
Employee Summary Report	Who is on our active roll right now, and in what role?	On-demand	High	Employee Information Manager
Pending Confirmations Report	Whose probation is due or overdue for a confirmation decision?	Monthly	High	Employee Information Manager
Resignations & Separations List	Who has left, when, and why?	Monthly	High	Employee Information Manager
Employee Profile Report	What is the full record we hold for this employee?	On-demand	High	Employee Information Manager
Pending Movement Applications	Which movements are stuck in the approval pipeline?	Weekly	High	Employee Life Cycle
Employee Joining Statistics	How many people did we hire and who joined?	Monthly	Medium	Employee Information Manager
Interview Process Statistics	Where is each vacancy in the funnel?	Weekly	High	Recruitment

Line managers

Report	Business question	Frequency	Criticality	Module
Daily Attendance Report	Who is in, who is late and who is absent today?	Daily	High	Time & Attendance
Employee Pending Leave Details	Which leave requests are waiting for approval?	Weekly	High	Absence Management
Employee Leave Balance Summary	How much leave does each employee have left?	Monthly	High	Absence Management
Roster Schedules Report	Who is working which shift this month?	Monthly	Medium	Time & Attendance

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Report	Business question	Frequency	Criticality	Module
Pending Confirmations Report	Whose probation is due or overdue for a confirmation decision?	Monthly	High	Employee Information Manager
Overtime Reasons Report	Why is overtime happening?	Monthly	Medium	Time & Attendance
Form Submission Status	Who has not submitted their forms?	Weekly	High	Performance Management

Payroll team

Report	Business question	Frequency	Criticality	Module
Invalid Attendance (Missed Punch) Report	Whose attendance data needs correction before payroll?	Daily	High	Time & Attendance
Overtime Details Report	How much overtime was worked and of what type?	Per pay cycle	High	Time & Attendance
Negative Salary Exceptions	Whose deductions exceed earnings?	Per pay cycle	High	Payroll
Monthly Basic Salary Reconciliation	Why did total basic salary change from last month?	Per pay cycle	High	Payroll
Payroll Grand Summary	What is our total payroll for the period?	Per pay cycle	High	Payroll
Monthly Bank & Cash Summary	How much do we pay via bank and via cash?	Per pay cycle	High	Payroll
Statutory Contributions Detail (EPF)	How much EPF was deducted and contributed?	Monthly	High	Payroll
Monthly PAYE Details	How much PAYE was deducted this month?	Monthly	High	Payroll - Sri Lanka Statutory
Pay Slip	What was paid, and what was deducted?	Per pay cycle	High	Payroll

System administrators

Report	Business question	Frequency	Criticality	Module
Pending Workflow Approvals	Where is work stuck, and with whom?	Weekly	High	System Administration & Compliance

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Report	Business question	Frequency	Criticality	Module
Invalid Attendance (Missed Punch) Report	Whose attendance data needs correction before payroll?	Daily	High	Time & Attendance
Pending Movement Applications	Which movements are stuck in the approval pipeline?	Weekly	High	Employee Life Cycle

HR head / management

Report	Business question	Frequency	Criticality	Module
Consolidated Employee Summary Dashboard	What does our workforce look like and is it balanced?	Quarterly	High	Employee Information Manager
Age Analysis Report	What is our age profile and are we exposed to retirement waves?	Annual	Medium	Employee Information Manager
Service Analysis Report	How experienced and how stable is our workforce?	Annual	Medium	Employee Information Manager
Movement Type Variation Graph	Is internal mobility rising or falling?	Annual	Medium	Employee Life Cycle
HR Plan - Deficit vs Prior Year	Where have our gaps grown or shrunk?	Annual	High	Manpower Planning
Annual Assessment by Supervisor	Is this supervisor rating fairly and consistently?	Annual	High	Performance Management

Finance / compliance

Report	Business question	Frequency	Criticality	Module
Payroll Grand Summary	What is our total payroll for the period?	Per pay cycle	High	Payroll
Monthly Loan Reconciliation	Do loan balances and recoveries match?	Monthly	High	Loan Management
Loan Outstanding Report	What is outstanding and who owes it?	Monthly	High	Loan Management
Tax Report	How much tax was deducted and from whom?	Monthly	High	Payroll
Gratuity Eligibility Report	Who is eligible for gratuity today?	Monthly	High	Payroll - Sri Lanka Statutory

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Report	Business question	Frequency	Criticality	Module
Annual T&D Expenditure and Days	How much did we spend on training and how many days?	Annual	High	Training & Development

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6. Standard Letter Templates

The following standard letter templates are available. Merge fields are shown as a guide to the data each letter draws on.

Letter	Purpose	Typical trigger	Key merge fields
Joining Letter	Confirms the date of joining and initial terms.	New joiner record created	Name, designation, grade, department, join date, probation period, reporting manager
Promotion Letter	Communicates promotion, new designation, grade and effective date.	Promotion approved	Name, old and new designation and grade, effective date, new salary
Confirmation Letter	Confirms the employee after successful probation.	Probation review approved	Name, designation, confirmation date, any change in terms
Increment Letter	Communicates a salary increment and its effective date.	Increment approved	Name, old and new salary, effective date, reason
Transfer Letter	Communicates transfer to a new division or location.	Transfer approved	Name, old and new division and location, effective date, reporting manager

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7. Planned Enhancements

The reports below are planned additions to the standard Catalog. They are indicative and subject to release scheduling; they are not part of the current standard report set.

Ref	Planned report	Module	What it will show	Primary users
PLN-01	**Leave Liability & Encashment Provision**	Absence Management	Value of unused leave (days x daily rate) by department, split by encashable / lapsing balances.	Payroll, HR Head, Finance
PLN-02	**Absenteeism & Leave Trend Analysis**	Absence Management	Absence rate by department, leave type and month, with spikes flagged (e.g. Monday / Friday patterns, sick leave frequency).	HR, Managers, HR Head
PLN-03	**No-Pay Leave Summary**	Absence Management	Employees with no-pay / unpaid leave days in a pay period, with approval status.	HR, Payroll
PLN-04	**Team Leave Calendar**	Absence Management	Calendar view of approved and pending leave by team.	HR, Managers
PLN-05	**Monthly Attendance Summary (Payroll Readiness)**	Time & Attendance	One line per employee: days worked, absent, late, no-pay, OT hours for the pay period.	HR, Payroll
PLN-06	**Overtime Cost vs Budget**	Time & Attendance	Actual overtime cost against budget by department.	Managers, HR Head, Finance
PLN-07	**Punctuality & Late Arrival Trend**	Time & Attendance	Monthly late-arrival trend by department and shift.	Managers, HR Head
PLN-08	**Recruitment Funnel & Time-to-Fill**	Recruitment	Applications to hire conversion by stage, average days to fill, offer acceptance and joining rate.	HR, HR Head
PLN-09	**Payroll Variance Report (Month-on-Month)**	Payroll	Differences in gross, deductions and net per employee vs previous month, with reason codes.	Payroll, Finance, Audit
PLN-10	**Payroll Cost by Cost Centre**	Payroll	Gross pay, employer contributions and total cost by department / cost centre.	HR Head, Finance
PLN-11	**Payroll Input Changes (Joiners, Leavers, Changes)**	Payroll	All new joiners, leavers and master-data changes (salary, bank, tax, allowances) since last pay run.	HR, Payroll, Audit
PLN-12	**Arrears & Manual Adjustment Audit**	Payroll	One-off payments, arrears and manual adjustments with approver and reason.	Payroll, Finance, Audit
PLN-13	**ETF Contribution Report**	Payroll - Sri Lanka Statutory	ETF employer contribution per employee and total for the period.	Payroll, Finance, Audit

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Ref	Planned report	Module	What it will show	Primary users
PLN-14	**Gratuity Liability Provision**	Payroll - Sri Lanka Statutory	Estimated gratuity liability by employee, based on service and last drawn salary.	HR Head, Finance
PLN-15	**Leaver Loan Recovery Report**	Loan Management	Outstanding loans for employees who are leaving or have left.	HR, Payroll, Finance
PLN-16	**Performance Rating Distribution & Calibration**	Performance Management	Distribution of ratings by department, grade and supervisor against the target curve.	HR, HR Head
PLN-17	**Performance vs Reward Alignment**	Performance Management	Rating vs increment / bonus / promotion outcome per employee.	HR, HR Head, Finance
PLN-18	**Employee Performance Dossier**	Performance Management	One-page consolidated view: goals, mid-year, achievements, misses, competencies and critical incidents.	HR, Managers
PLN-19	**Training Budget vs Actual**	Training & Development	Training budget utilisation by department.	HR, HR Head, Finance
PLN-20	**Training Bond & Service Commitment Tracker**	Training & Development	Employees with training bonds, bond period remaining and recoverable cost on exit.	HR, Finance
PLN-21	**Approved Cadre vs Actual Headcount**	Manpower Planning	Approved positions vs filled positions by division, with vacancy and over-establishment flagged.	HR, HR Head, Finance
PLN-22	**Disciplinary Case Ageing**	Disciplinary Management	Open cases by age with the next pending action.	HR, HR Head, Audit
PLN-23	**Executive HR KPI Scorecard**	HR Analytics (Strategic)	One page of headline KPIs: headcount, attrition, time-to-fill, absenteeism, training days, payroll cost per FTE.	HR Head
PLN-24	**Headcount & Movement Trend**	HR Analytics (Strategic)	Headcount by month with joiners, leavers, transfers and promotions.	HR, HR Head, Finance
PLN-25	**Attrition & Retention Analysis**	HR Analytics (Strategic)	Attrition rate by department, tenure band, grade and exit reason; early-leaver rate.	HR, HR Head
PLN-26	**Retirement & Contract Expiry Forecast**	HR Analytics (Strategic)	Employees reaching retirement age or contract end in the next 6 / 12 months.	HR, HR Head
PLN-27	**Workforce Diversity Snapshot**	HR Analytics (Strategic)	Gender, age and grade distribution, including gender mix by grade.	HR, HR Head
PLN-28	**User Access & Role Report**	System Administration & Compliance	Users, roles, and their permissions, with last login.	Admins, Audit
PLN-29	**Data Change Audit Log**	System Administration & Compliance	Changes to sensitive data (salary, bank, tax, status) with old / new value, user and time.	Payroll, Admins, Audit

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Ref	Planned report	Module	What it will show	Primary users
PLN-30	**Employee Data Completeness Check**	System Administration & Compliance	Missing or invalid mandatory fields (NIC, bank, EPF no., tax no., emergency contact).	HR, Payroll, Admins
PLN-31	**Letter Generation Register**	System Administration & Compliance	Letters generated by type, employee, user and date.	HR, Admins, Audit

Planned letter templates: Offer Letter, Probation Extension Letter, Warning / Show-Cause Letter, Acting / Secondment Letter, Salary / Employment Confirmation Letter, Resignation Acceptance & Relieving Letter, and Service / Experience Certificate.

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8. Notes

- Report availability depends on the modules licensed and on system configuration.
- Frequency, criticality and primary users are recommendations to guide usage and can be adapted to each organisation.
- Statutory reports support compliance requirements; customers should confirm current statutory formats with the relevant authorities.
- Where reports offer filters or selectors (for example, status, grouping or layout options), these are described in the "What it shows" column.