USER GUIDE

Administrator Guide

Set up HR4ON for go-live and keep it running: companies, structure, users and access, approvals, integrations, settings and governance.

WHO IT'S FOR

Platform administrators and HR administrators who configure HR4ON

COVERS

Go-live checklist, company and organisation, masters, users and access, Experience Studio, approval workflows, integrations, help answers, settings, governance

HR4ON · People First. Payroll Always. · ARTRA Technologies · 2 November 2026

About this guide

This guide is for the people who set HR4ON up and look after it: the **platform administrator**, who owns companies, users, access, workflows, integrations and the system's health, and the **HR administrator**, who owns some people-facing setup such as help answers, privacy requests and attendance devices.

Most screens live under **Administration** in the left menu. Where a screen belongs to the HR administrator rather than the platform administrator, the section says so at the top. The platform administrator does not see salary figures; payroll setup is covered in the Payroll guide.

Work through the chapters in order when you set up a new company. Once you are live, use the chapters as a reference for the job in hand.

What you can do in HR4ON

- Follow the go-live setup checklist and see what still blocks go-live
- Set up companies, branches, departments, teams, grades, designations and cost centres
- Invite users, grant roles with the right data scope, and lock, unlock or disable accounts
- Run access reviews and check sign-in activity
- Design home themes, greetings and home cards in Experience Studio
- Build approval workflows with steps, amount conditions, SLAs and escalation
- Watch live approvals, reassign stuck requests and reroute them after manager changes
- Manage connectors, imports, webhooks and attendance devices
- Keep self-service help answers and settings up to date
- Use the audit log, privacy requests, retention, legal holds, security alerts and incidents

Before you start

- Open HR4ON in a web browser on your laptop, or on your phone. On a phone you can add it to your home screen and use it like an app.
- Sign in with your **username or work email** and your password. Use **Accept an invitation** the first time, or **Can't sign in?** if you are locked out.
- What you see depends on your role. If a menu or button in this guide is missing for you, ask your HR administrator.

A red outline in a screenshot shows where to click or look.

Button Words shown like this are labels you will see on screen.

The screenshots use the HR4ON demonstration company, so the names, numbers and dates are examples. Screenshots were taken as Sanjay Verma (platform administrator) and, where marked, Meera Nair (HR administrator) in the Alpha Demo company.

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01 Getting around as an administrator

Where the administration screens are, and the page tools you will use on almost every one of them.

1.1 The Administration menu

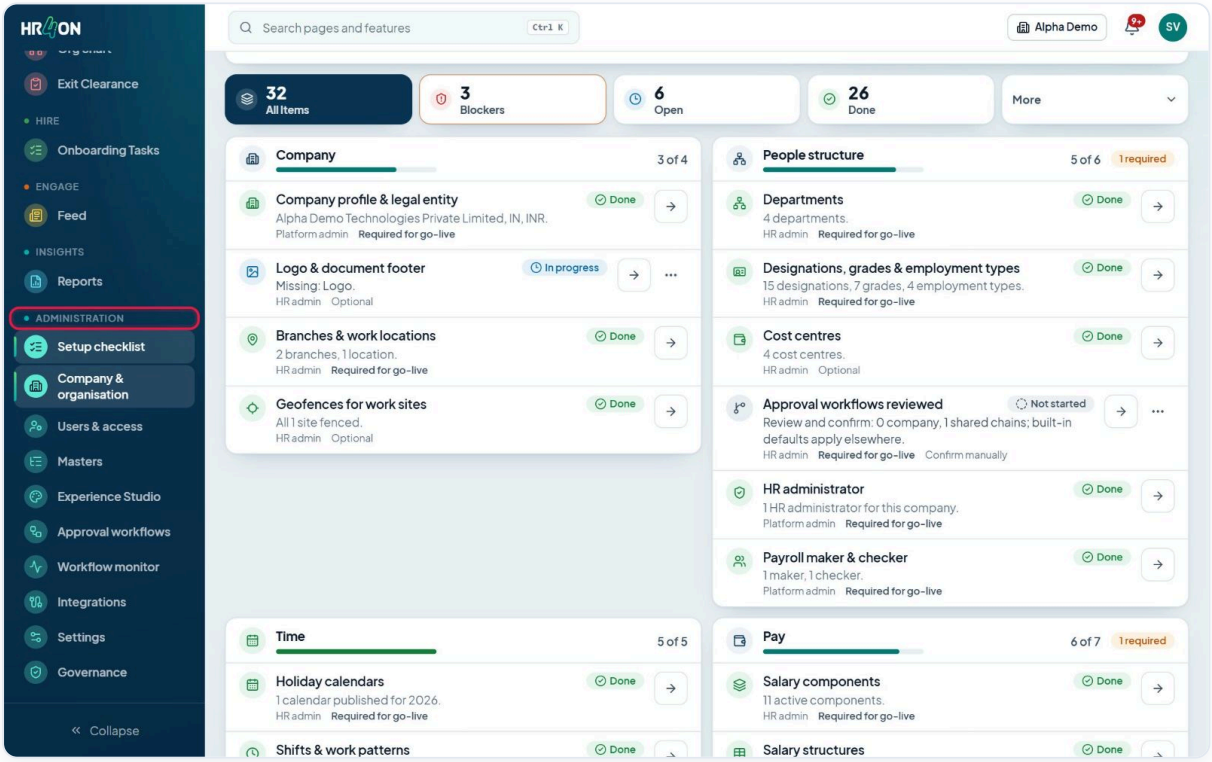
Every setup screen in this guide is in the **Administration** group of the left menu. What you see depends on your role: the platform administrator and the HR administrator see slightly different lists.

WHAT YOU SEE

- **Setup checklist**: the go-live checklist for a company.
- **Company & organisation** and **Masters**: companies, units and lookup values such as grades and cost centres.
- **Users & access**: users, roles, access register, access reviews and sign-in activity.
- **Experience Studio**: home page themes, cards and celebrations.
- **Approval workflows** and **Workflow monitor**: approval chains and the live view of every request.
- **Integrations**, **Settings** and **Governance**: connections to other systems, system settings, and audit, privacy and security.

HOW TO DO IT

1. Sign in with your work account.
2. Scroll the left menu to the **Administration** group.
3. Select the screen you need. You can also press **Ctrl K** and type the screen name.



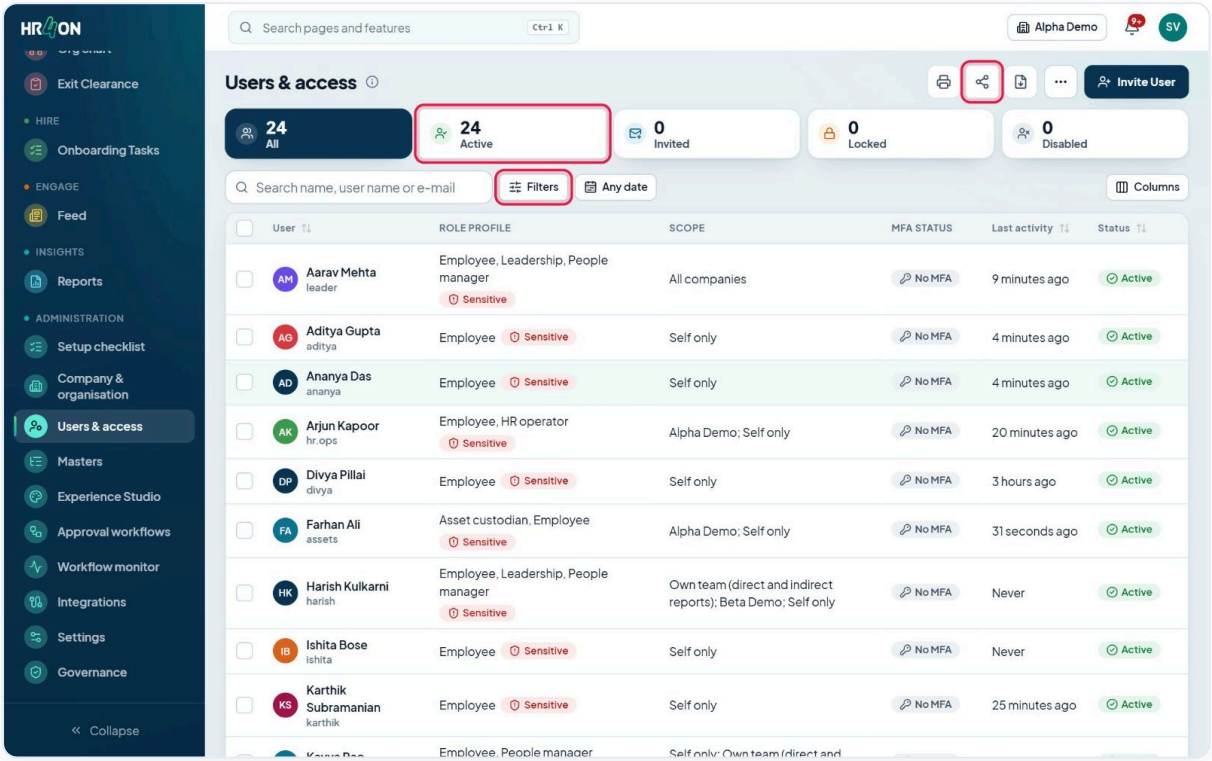
The Administration group in the left menu.

1.2 Page tools: tabs, counts, filters, print and share

List screens share the same tools, so once you know them on one page you know them everywhere.

WHAT YOU SEE

- **Count tabs** across the top of a list (for example **Active**, **Invited**, **Locked**) show how many records are in each state. Select one to filter the list.
- **Filters** and the date control narrow the list further. **Columns** chooses which columns show.
- **Print**, **Share PDF** and **Download PDF** produce a branded copy of what is on screen. **Export** downloads the list as a spreadsheet.
- The **i** button (**More information**) next to a page title explains what the page is for.



02 Go-live setup checklist

The setup checklist walks a company from first setup to its first live payroll. It checks the real data, so items tick themselves off as you complete the work on other screens.

2.1 Read the checklist

Open the checklist at the start of an implementation and every few days after. It shows each phase, what is done, what is still open and what blocks go-live.

WHAT YOU SEE

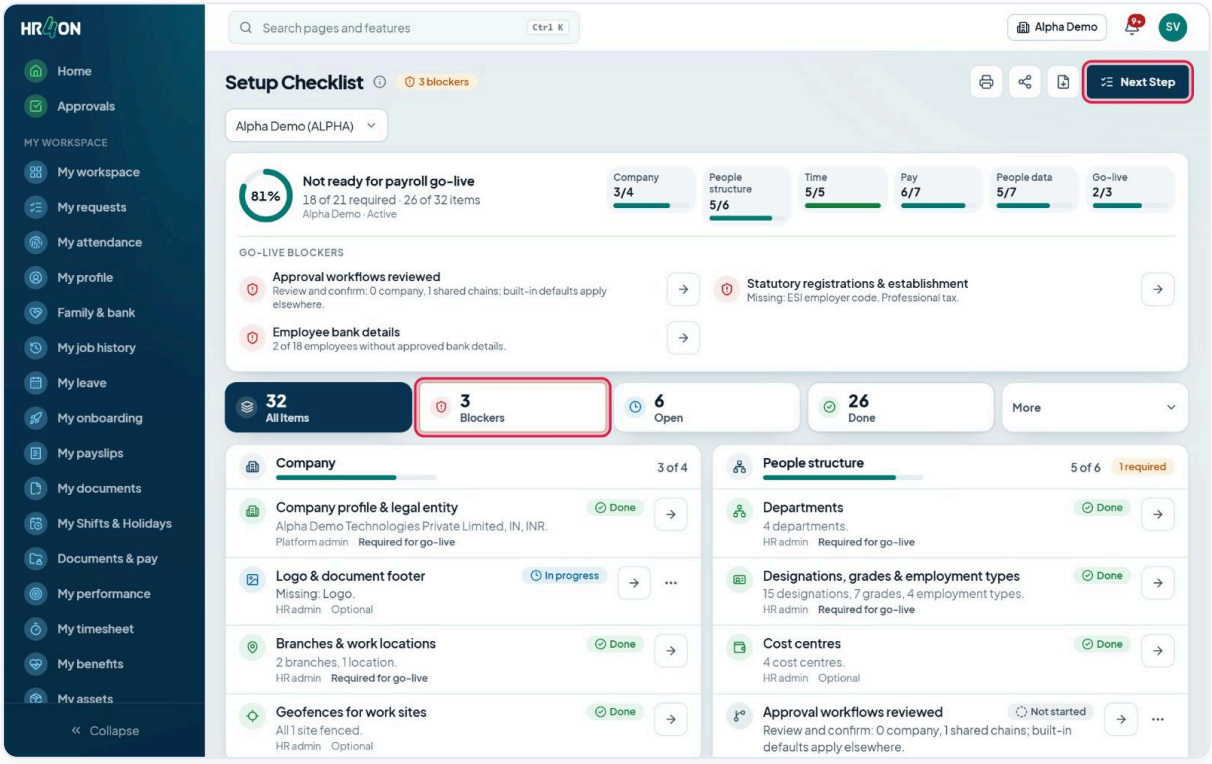
- The phase bar (**Company**, **People structure**, **Time**, **Pay**, **People data**, **Go-live**) shows how many items are done in each phase.
- Count tabs: **All Items**, **Blockers** (must be done before go-live), **Open** and **Done**.
- Each item shows its status (**Done**, **In progress**, **Not started**), who owns it, and whether it is **Required for go-live** or **Optional**. The arrow button takes you straight to the screen where the work is done.
- **Next Step** jumps to the next open item in order.

HOW TO DO IT

1. Select **Setup checklist** in the Administration menu.
2. Choose the company at the top if you look after more than one.
3. Select **Blockers** to see what must be finished first.
4. Select the arrow next to an item to go and do the work.

GOOD TO KNOW

- Items are checked against live data. You cannot tick an item done by hand unless it is one that can only be confirmed by a person (for example a parallel run).



2.2 Confirm or skip an item

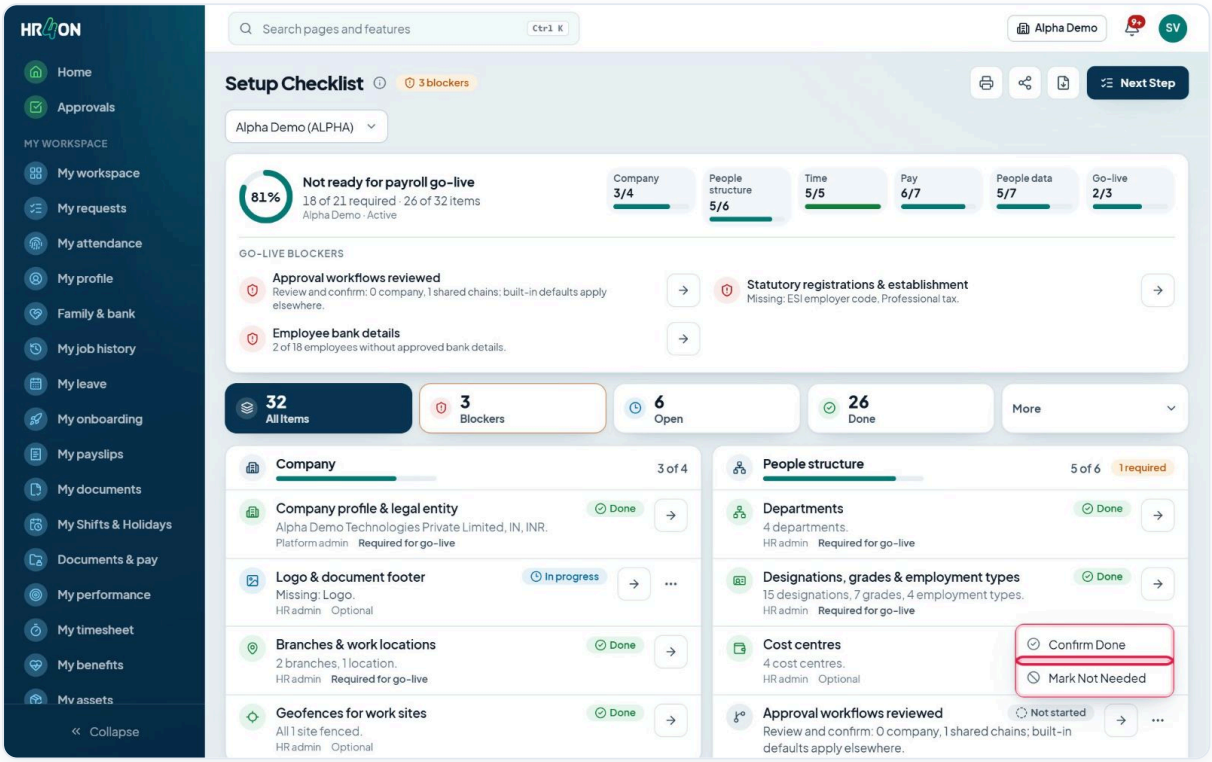
Some items need a person to confirm them, and some do not apply to every company (for example geofences when nobody punches from a phone). Use the item's actions menu for these.

HOW TO DO IT

1. Find the item in the list.
2. Select its **Actions for …** menu (the three dots).
3. Choose **Confirm Done** when you have checked the work (only for items marked **Confirm manually**), or **Mark Not Needed** and type **Why isn't this needed?**.

GOOD TO KNOW

- A skipped item stays visible with the reason, so auditors can see why it was not done.



2.3 Setup readiness checks

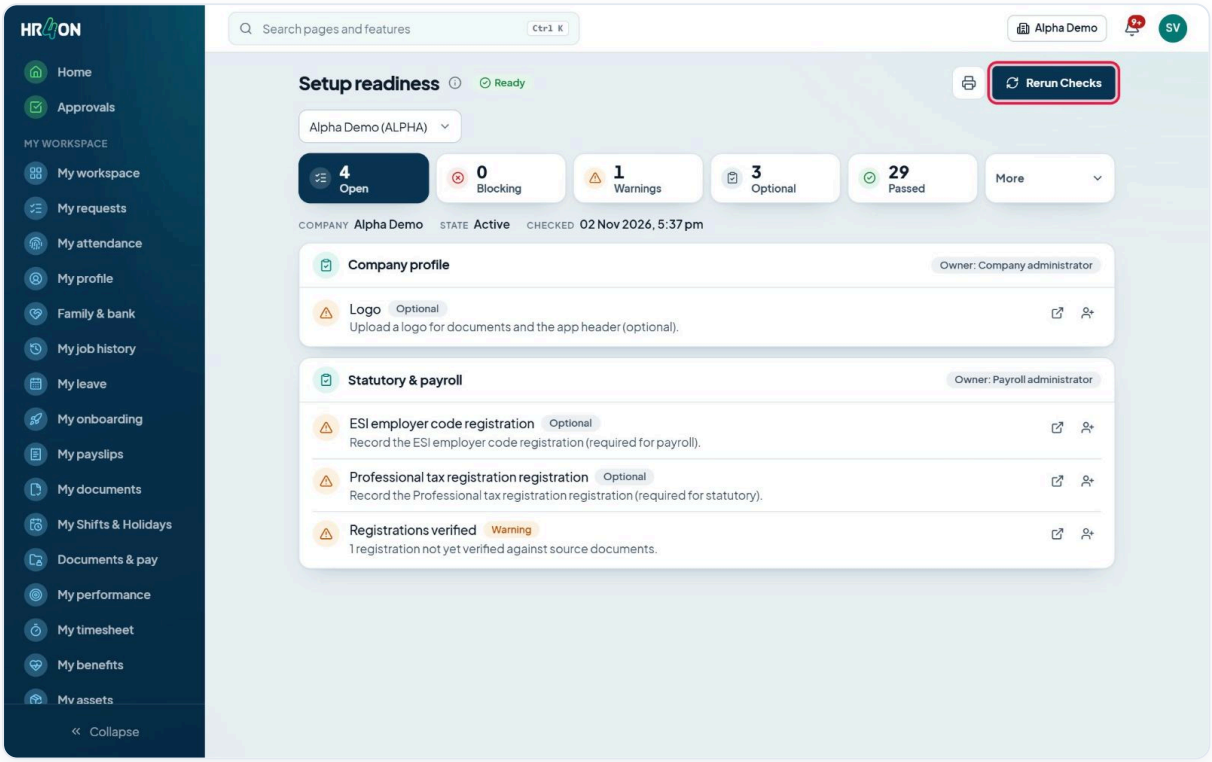
Readiness runs automatic checks on a company (profile, registrations, statutory details) and lists what is blocking, what is a warning and what is optional.

WHAT YOU SEE

- **Blocking**: go-live cannot proceed.
- **Warnings**: should be fixed, but do not stop activation.
- **Optional**: nice to have, such as a logo.

HOW TO DO IT

1. Open **Company & organisation**, select **More organisation pages** and choose **Readiness**.
2. Choose the company.
3. Select **Rerun Checks** after fixing something.
4. Use **Assign** next to a finding to send it to the person who owns it.



03 Companies and organisation structure

A company is a legal entity that employs people and runs payroll. Under it you build the structure: branches and locations, departments and teams. Every change is dated, so history is never lost.

3.1 See your companies

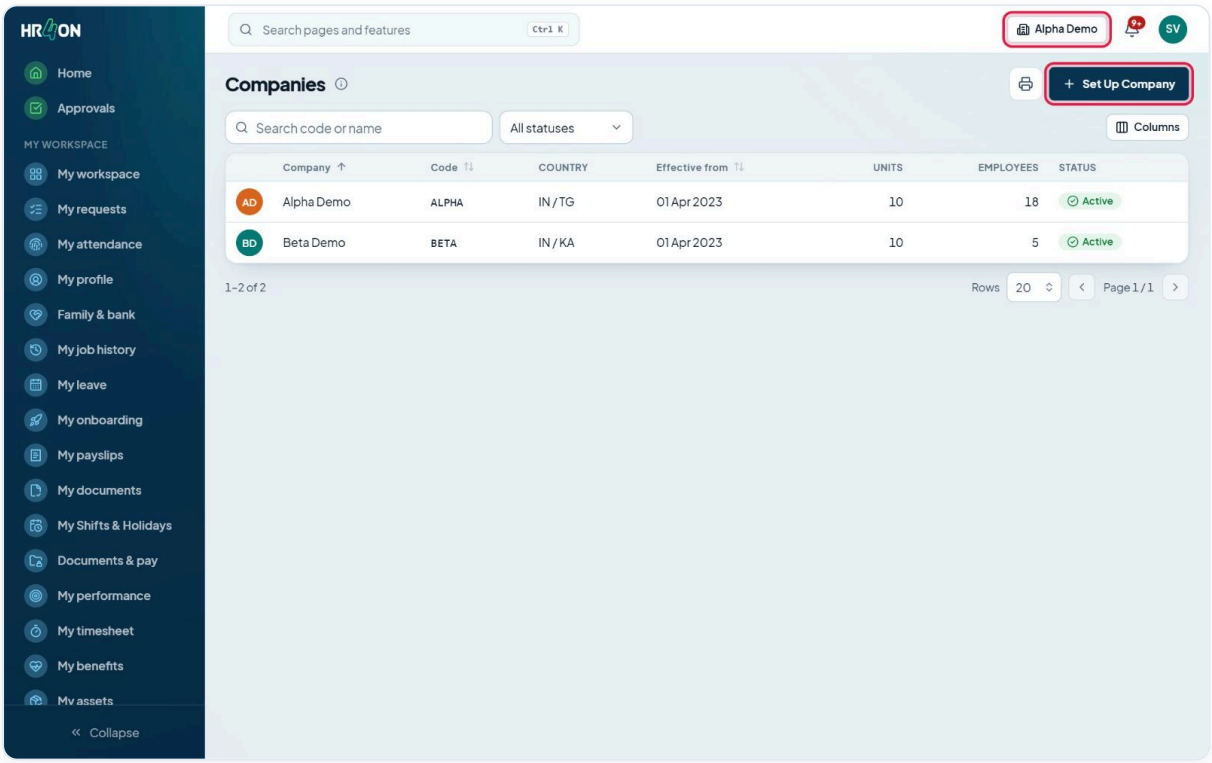
The companies list shows every legal entity in HR4ON with its code, country, number of units and employees, and status.

WHAT YOU SEE

- **Draft**: being set up, not yet usable.
- **Active**: live; employees and payroll can use it.
- **Inactive**: closed from a date.

HOW TO DO IT

1. Open **Company & organisation**.
2. Select **More organisation pages** and choose **Companies**.
3. Select a company to open it.



3.2 Set up a new company

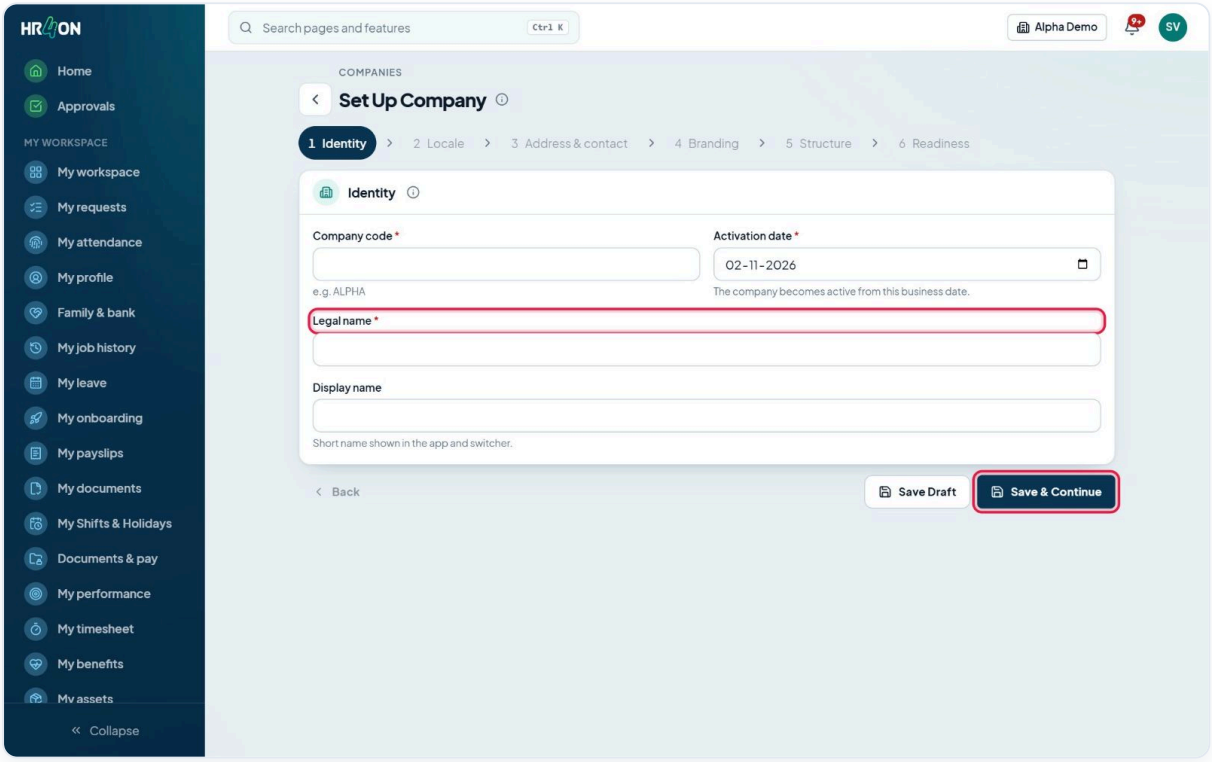
Use the setup wizard to create a company as a draft, fill in its details step by step, and then send it for activation.

HOW TO DO IT

1. On **Companies**, select **Set Up Company**.
2. Complete each step in the left list: **Identity**, **Locale**, **Address & contact**, **Branding**, **Structure** and **Readiness**.
3. In **Identity** enter the **Company code**, the **Activation date** (when the company becomes active), the **Legal name** and a short **Display name**, then select **Save & Continue**.
4. In **Locale** set the **Country (ISO 2)**, **Base currency**, **Time zone**, **Locale (regional format)** and **Financial year starts in**.
5. Select **Save Draft** at any time. Come back later with **Continue Setup** on the company page.
6. On **Readiness**, select **Run Checks**, fix anything marked **Blocking**, then send the company for activation.

GOOD TO KNOW

- Activating a company goes through an approval (by default another platform administrator). The company stays **Draft** until it is approved.
- The company code cannot be changed once the company is active.



3.3 Company details, registrations and amendments

The company page holds its legal identity, address, statutory registrations and the full version history. Changes to an active company are made as dated amendments.

WHAT YOU SEE

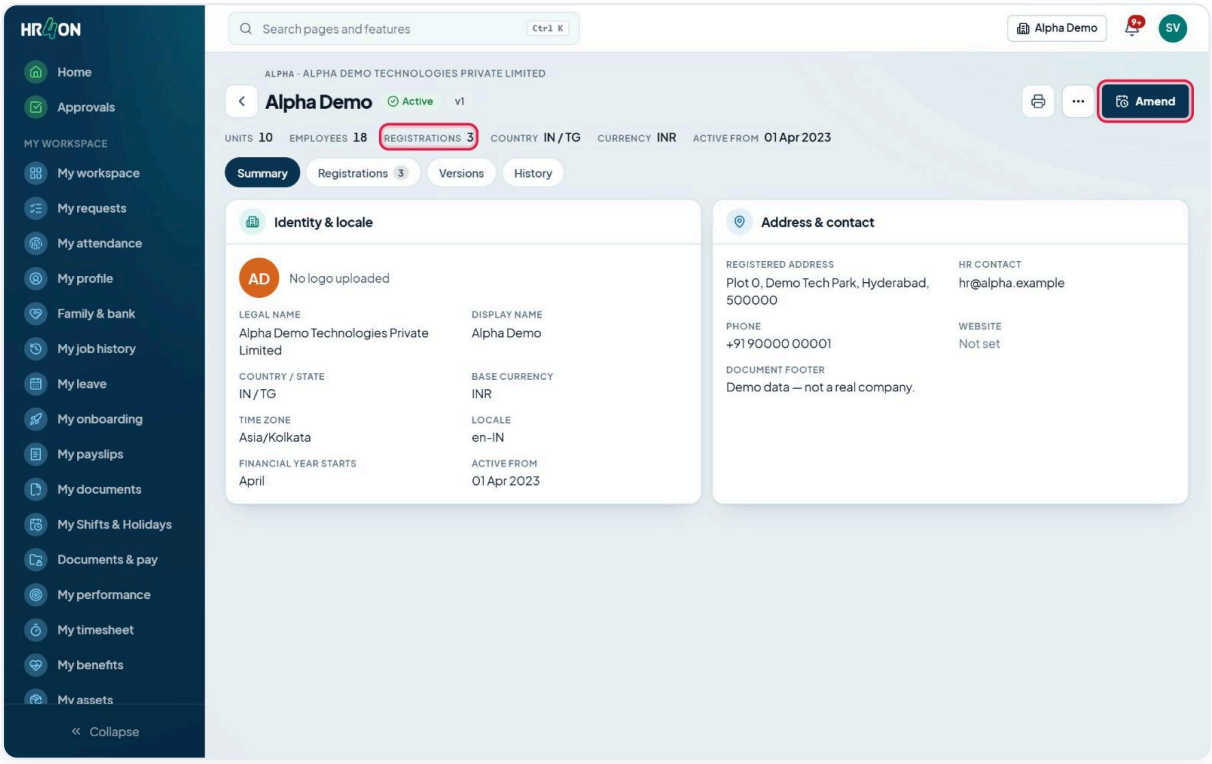
- **Summary**: identity, locale, address and contact.
- **Registrations**: PAN, TAN, PF, ESI, professional tax and similar numbers, each with validity dates.
- **Versions**: every dated version, with **Compare versions**.
- **History**: who changed what and when.

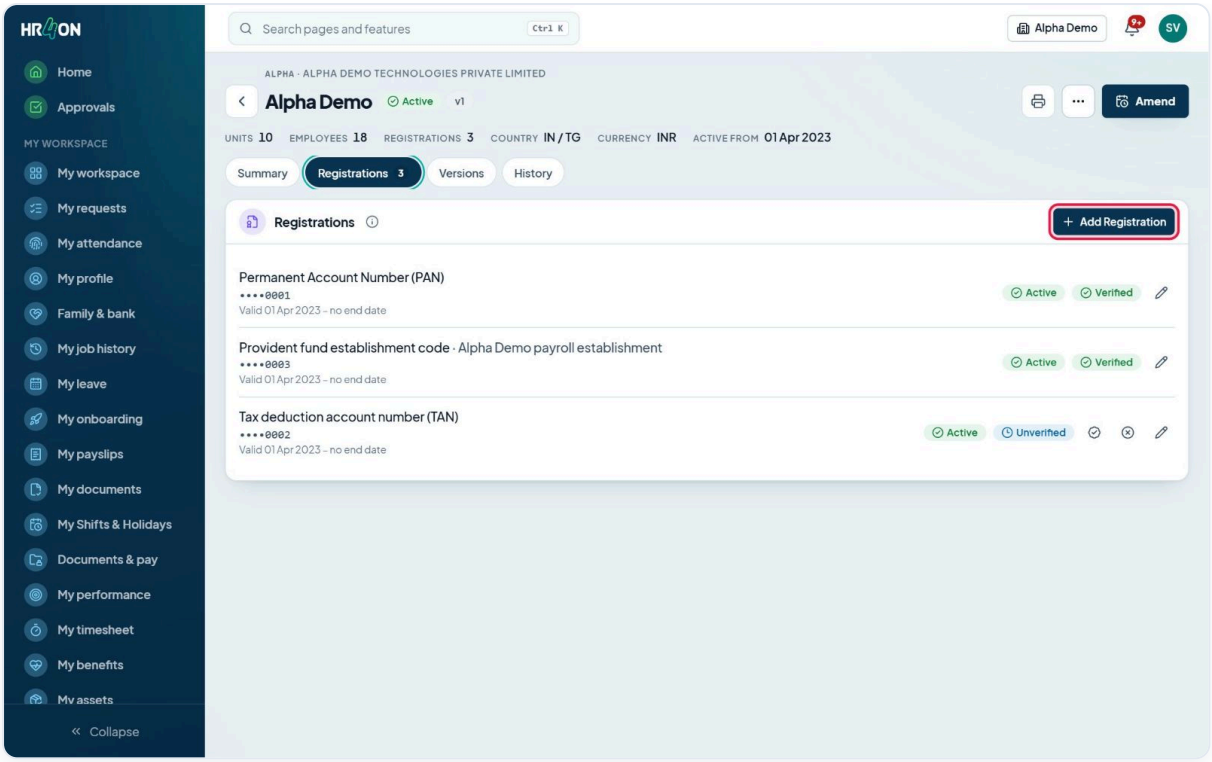
HOW TO DO IT

1. Open the company.
2. To change details from a date, select **Amend**, choose the **Effective from** date, make the change and enter the **Reason for the change**.
3. To add a registration, open **Registrations** and select **Add Registration**.

GOOD TO KNOW

- Amendments to an active company need approval before they apply.





The Registrations tab.

3.4 The organisation tree

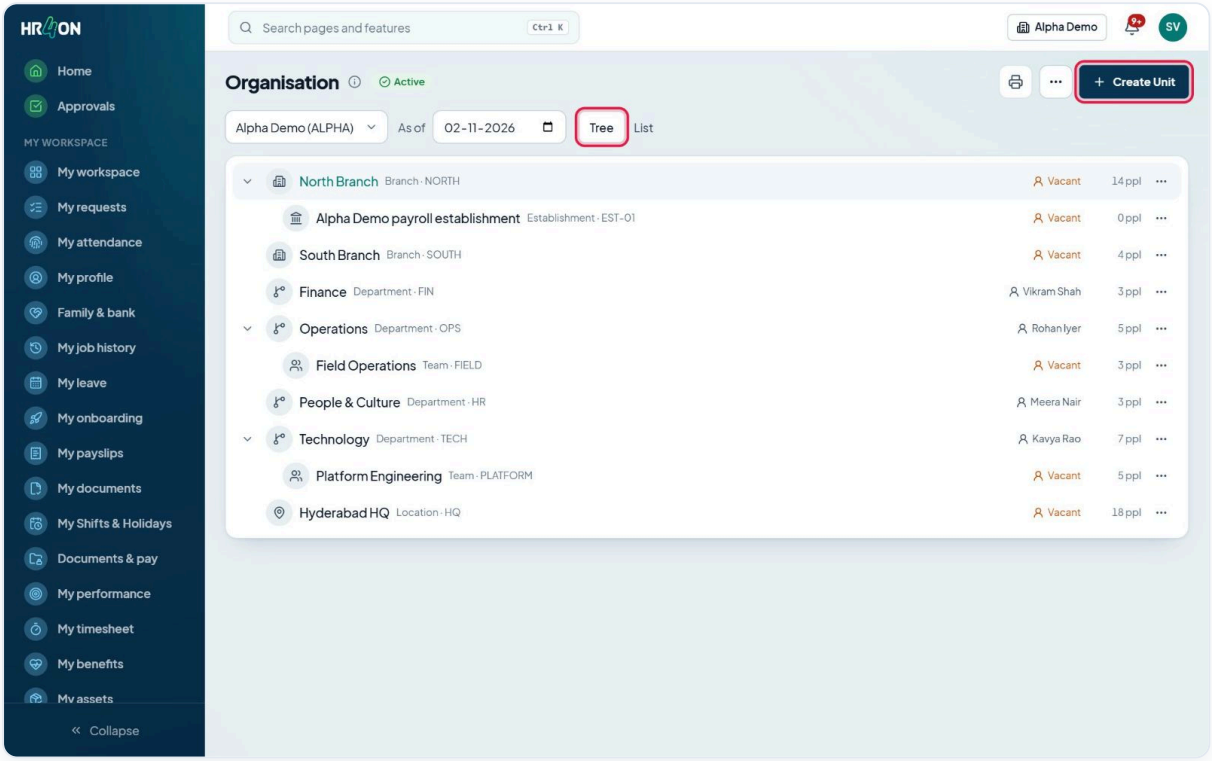
The organisation screen shows the structure of a company on any date: branches, locations, payroll establishments, departments and teams, each with its head and headcount.

WHAT YOU SEE

- Switch between **Tree** and **List** views.
- Choose **As of** to see the structure on a past or future date.
- Each card shows the unit type, code, head (or **Vacant**) and number of people.

HOW TO DO IT

1. Open **Company & organisation**.
2. Choose the **Company**.
3. Expand a unit to see the units below it, or open its actions menu.



3.5 Create a branch, location, department or team

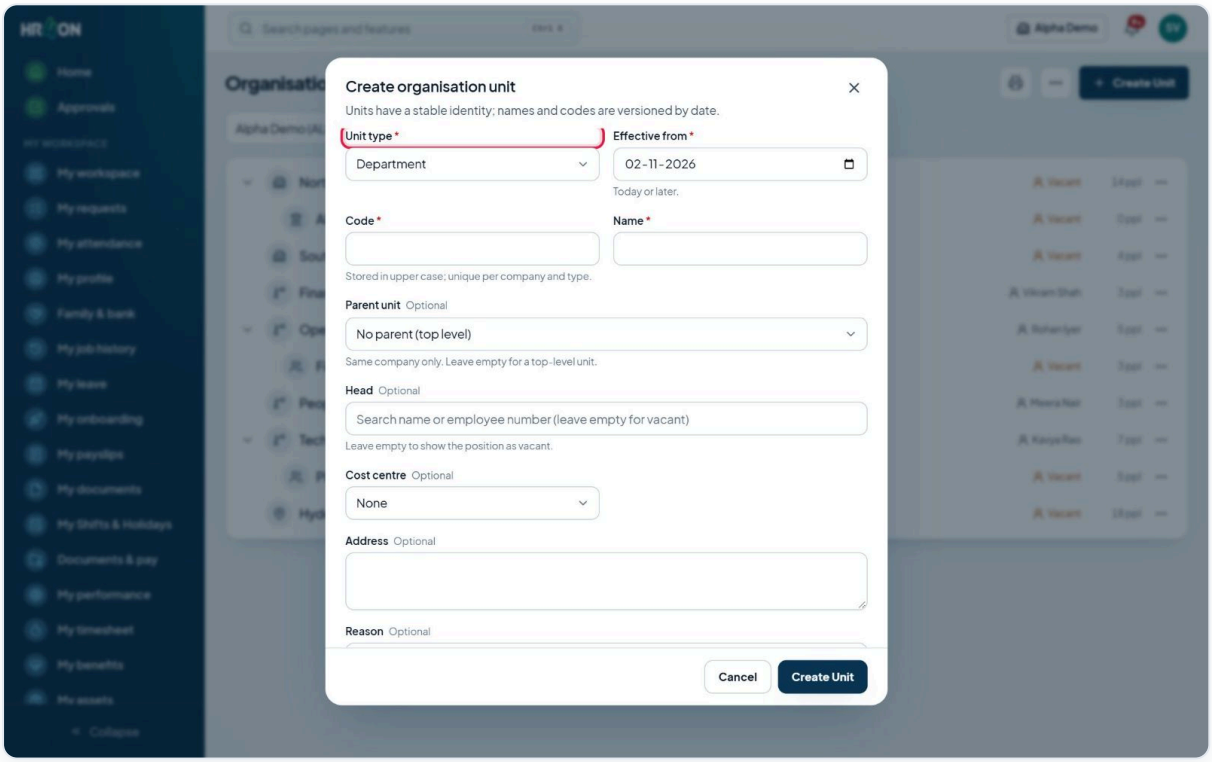
Units are the building blocks of the structure. Choose the right **Unit type**: Branch, Location, Payroll establishment, Department or Team.

HOW TO DO IT

1. Select **Create Unit** (or **Add Child Unit** from a unit's actions menu to put it under that unit).
2. Choose the **Unit type**, then enter the **Code** and **Name**.
3. Choose the **Parent unit** (leave **No parent (top level)** for a top-level unit), the **Head** (leave empty to show it as vacant) and the **Cost centre**.
4. Set **Effective from** (today or later), add a **Reason** if useful, and select **Create Unit**.

GOOD TO KNOW

- Units are dated. A unit created from next month does not appear in today's tree until that date.
- Moving or deactivating a unit is done from the unit page with **Change**; employees in the unit must be moved first.

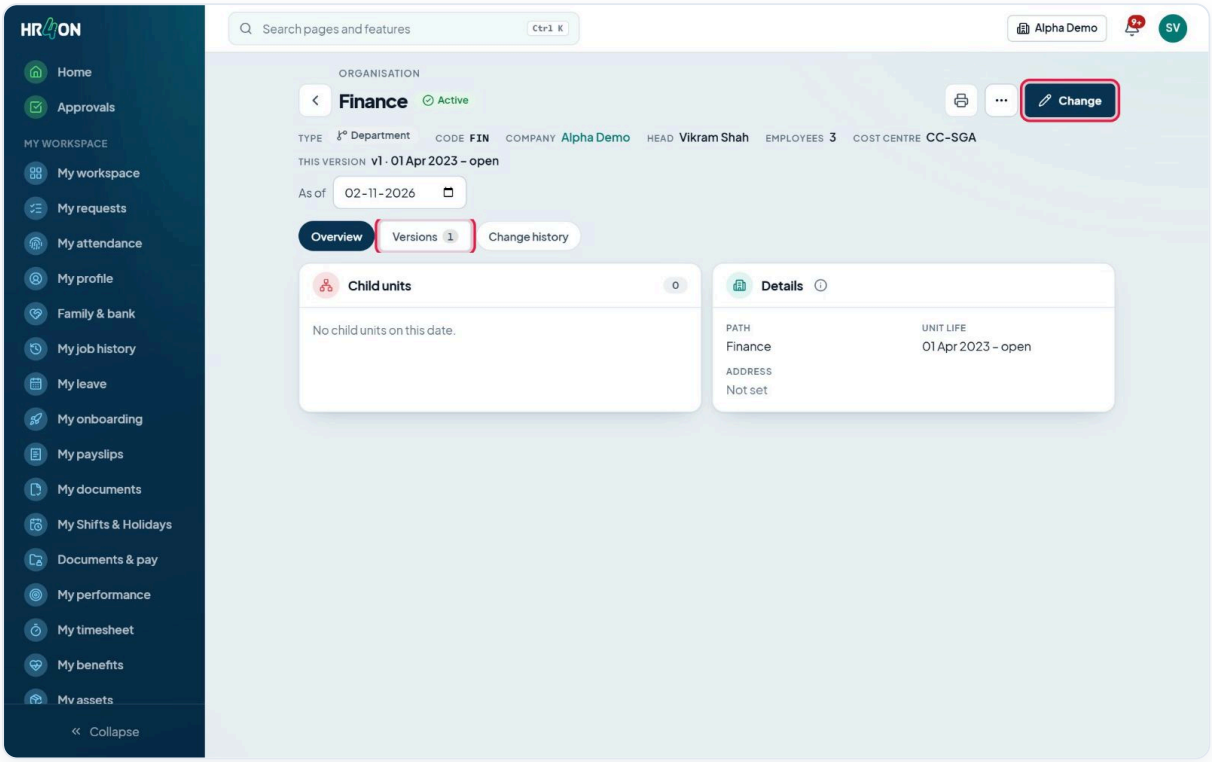


3.6 Unit details and changes

Open a unit to see its head, cost centre, child units, versions and change history, and to rename, move or close it from a date.

HOW TO DO IT

1. Select a unit in the tree, or use the **List** view.
2. Select **Change** to rename the unit, change its head or cost centre, move it under a new parent or deactivate it.
3. Enter the **Effective from** date and a **Reason**.



3.7 Organisation reports

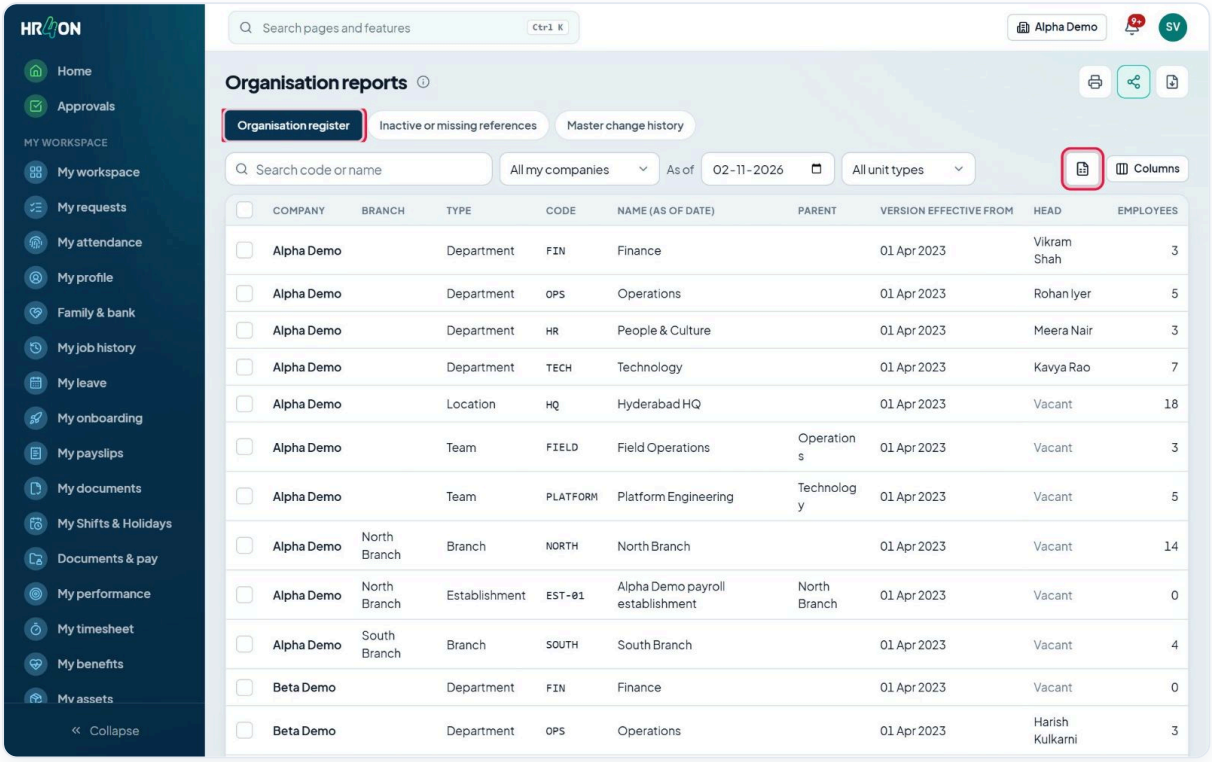
Use these reports to check the structure before go-live and to answer auditor questions.

WHAT YOU SEE

- **Organisation register**: every unit with its type, parent, head and cost centre.
- **Inactive or missing references**: units or employees pointing at retired values.
- **Master change history**: every change to master values.

HOW TO DO IT

1. Open **Company & organisation**, select **More organisation pages** and choose **Reports**.
2. Choose a report tab and select **Export** to download it.



04 Masters: grades, designations, cost centres and more

Masters are the lookup lists that other screens choose from: designations, job families, grades, employment types, work modes, cost centres, reasons and registration types.

4.1 Browse master values

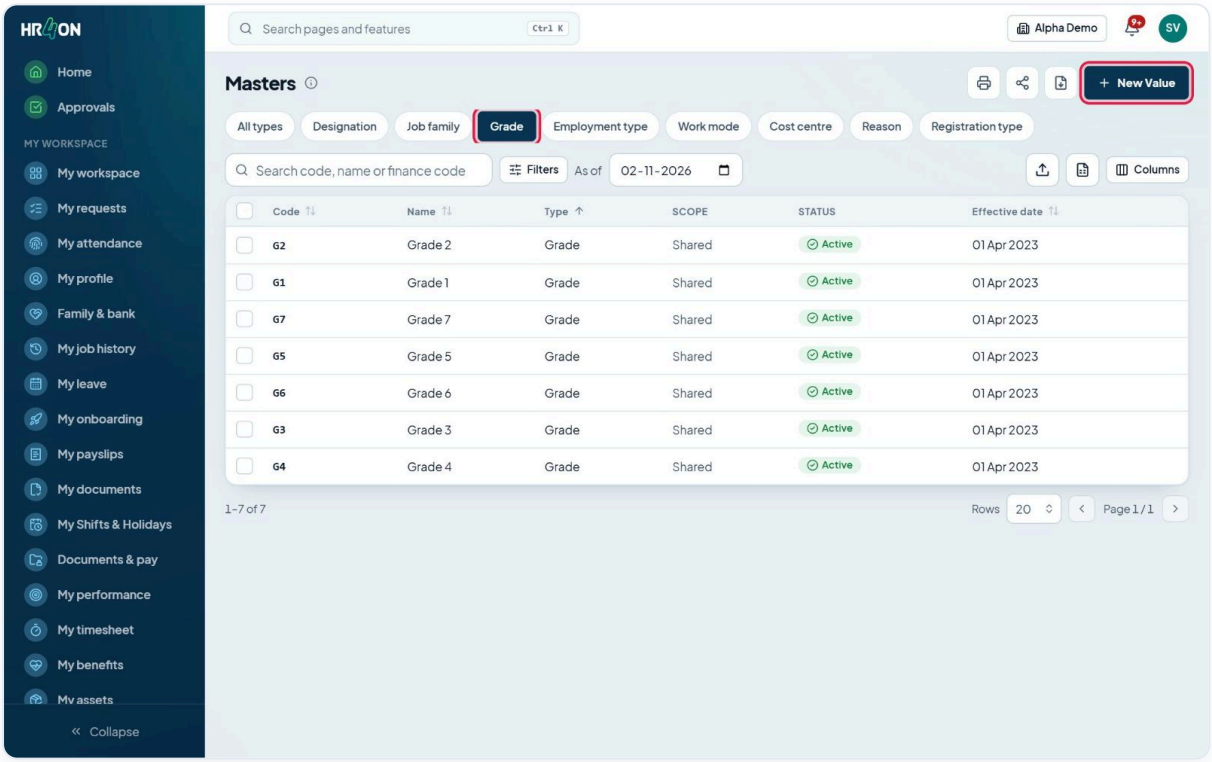
One screen holds every master list. Use the type tabs to switch lists.

WHAT YOU SEE

- **Code** and **Name**: what users see in drop-downs.
- **Scope**: **Shared** across all companies, or available to one company only.
- **Status** and **Effective date**: when the value became active.

HOW TO DO IT

1. Select **Masters** in the Administration menu.
2. Select a type tab such as **Grade** or **Cost centre**.
3. Use **As of** to see the list on another date.



4.2 Add or change a value

Add a designation, grade or cost centre before you need it in an employee record or a unit.

HOW TO DO IT

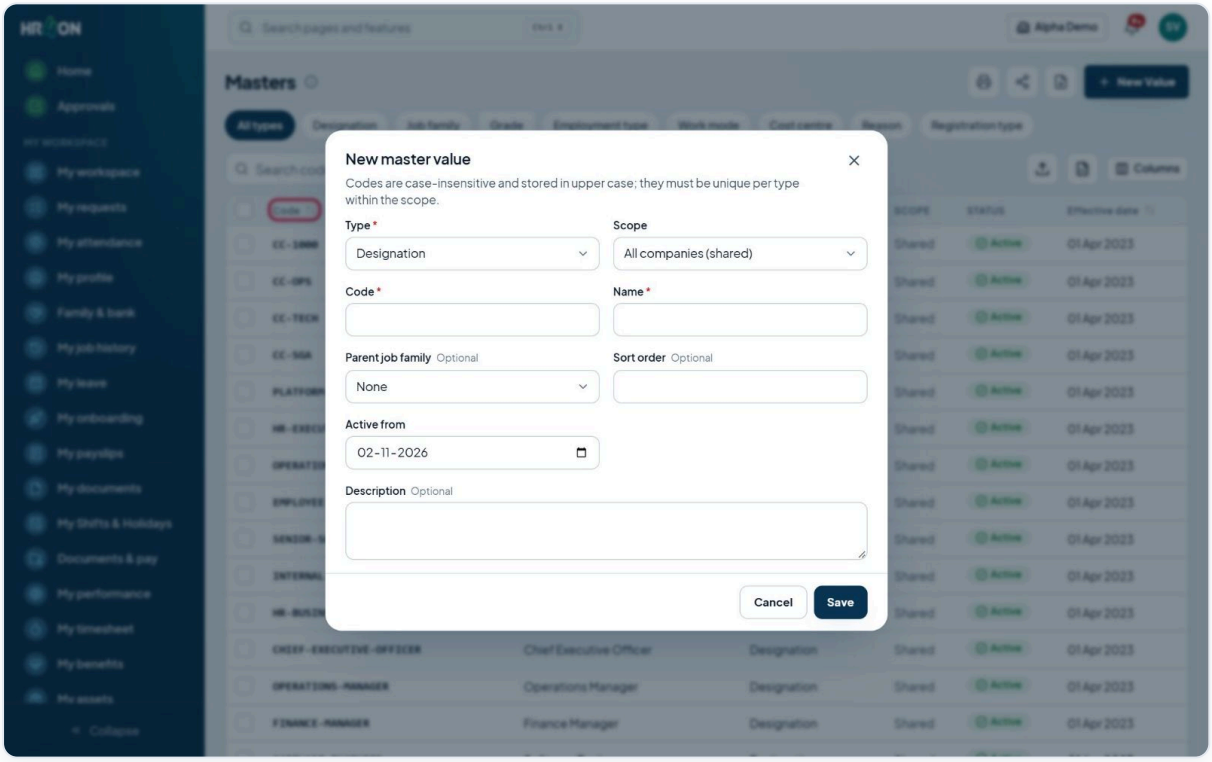
1. Select **New Value**.
2. Choose the **Type**, then enter the **Code**, **Name** and, if useful, **Description**.
3. For grades set the **Rank**; for cost centres add the **Finance / GL code**.
4. Choose **Available to company** (or leave it shared), set **Active from**, and select **Save**.
5. To change a value, open its row and select **Edit**. To stop using it, select **Retire**.

TIP

- To load many values at once, use **Template and import** to download the template, fill it in and import it.

GOOD TO KNOW

- Retire values instead of deleting them. **Delete** is only offered for values that were never used.
- Every change asks for a **Reason for the change** and is recorded in the master change history.



05 Users and access

Everyone who signs in to HR4ON is a user. What a user can do comes from their **roles**; which people's records they can see comes from the **scope** of each role.

5.1 The users list

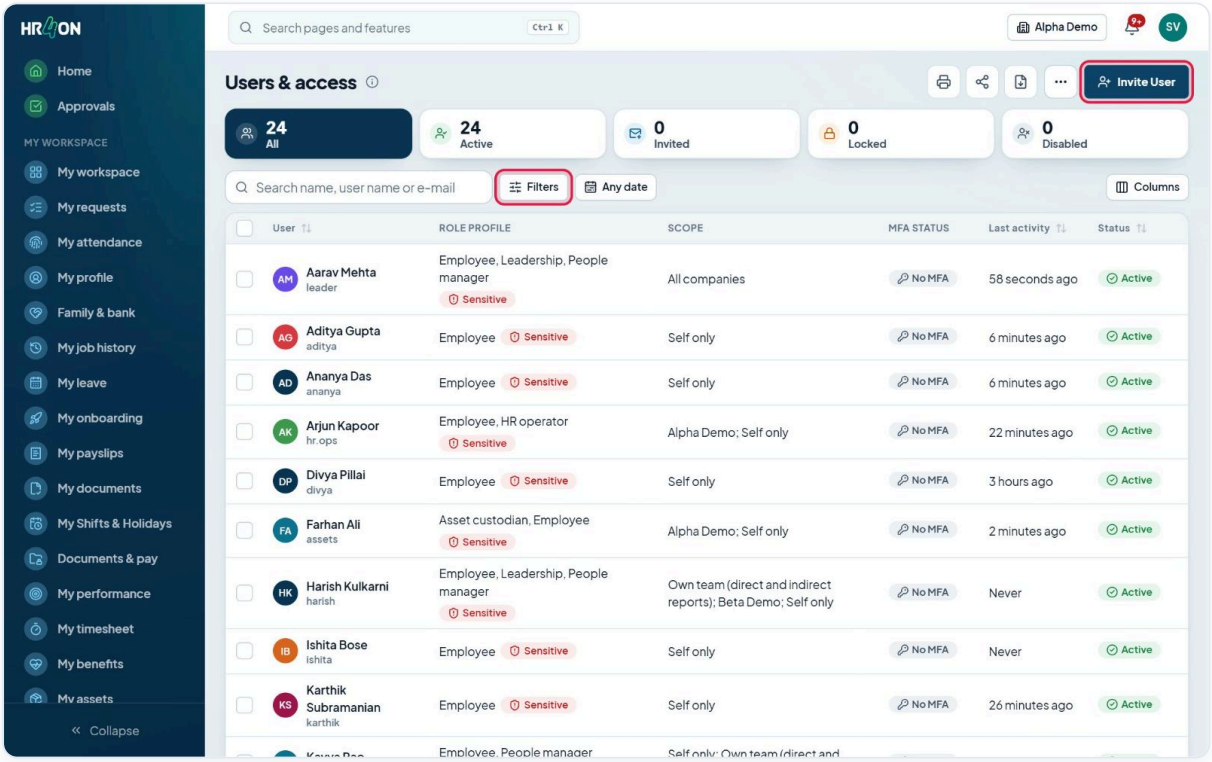
See every user, their roles and scope, whether they use two-step verification and when they were last active.

WHAT YOU SEE

- Count tabs: **All**, **Active**, **Invited** (not yet accepted), **Locked** and **Disabled**.
- **ROLE PROFILE** and **SCOPE** summarise what each user can do and see.
- **MFA STATUS** shows whether the user has set up an authenticator.

HOW TO DO IT

1. Select **Users & access**.
2. Use the count tabs or **Filters** to find users.
3. Select a name to open the user.



5.2 Invite a new user

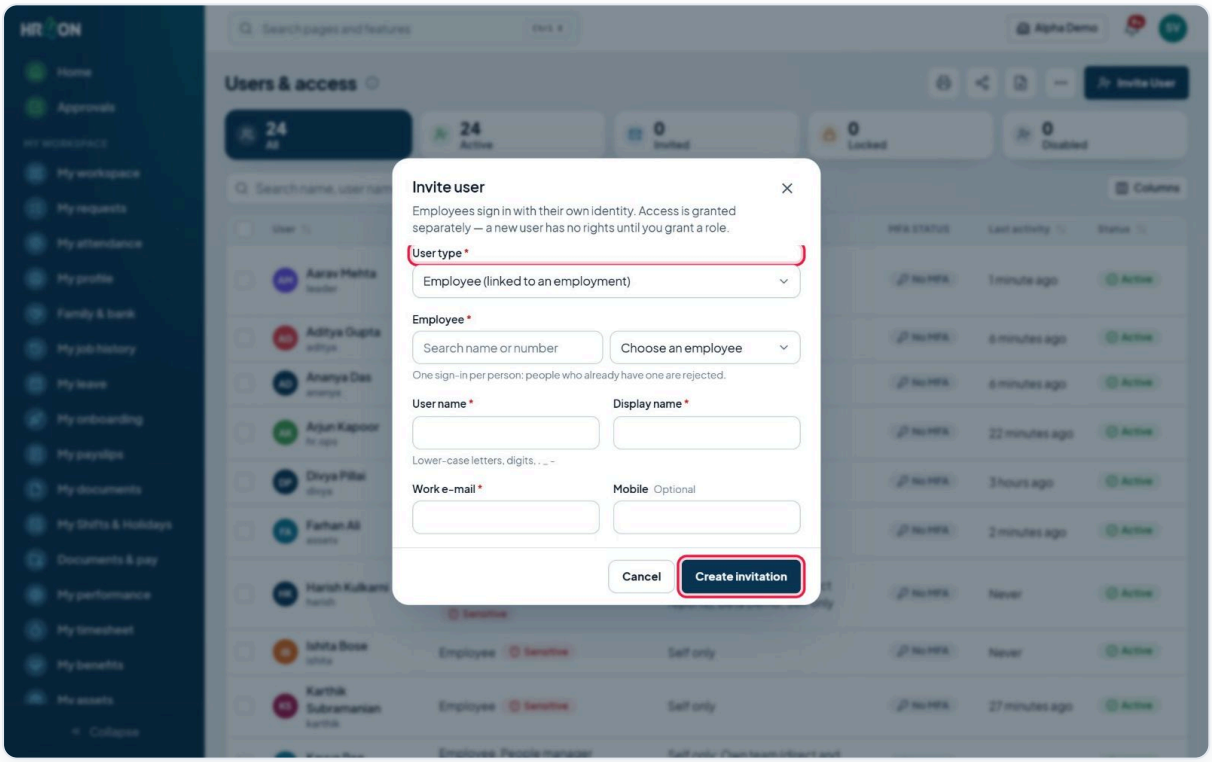
Invite people who need to sign in. Employees are usually invited from their employee record during onboarding; use this for anyone else or to re-send an invitation.

HOW TO DO IT

1. Select **Invite User**.
2. Choose the **User type**. For **Employee (linked to an employment)**, search for the person under **Employee** and pick them.
3. Enter the **User name** (lower-case letters, digits, dots, dashes or underscores), the **Display name**, the **Work e-mail** and, if you like, the **Mobile**.
4. Select **Create invitation**. HR4ON shows an **Invitation code**; share it with the person.
5. Open the new user and select **Grant Access** to give them their roles (see below).

GOOD TO KNOW

- A new user has no rights until you grant a role. Each person can have only one sign-in.
- The invitation code is shown once. If it is lost, open the user and choose **Issue new invitation code**.
- The person accepts on the sign-in page with **Accept an invitation** and sets their own password.



5.3 Open a user

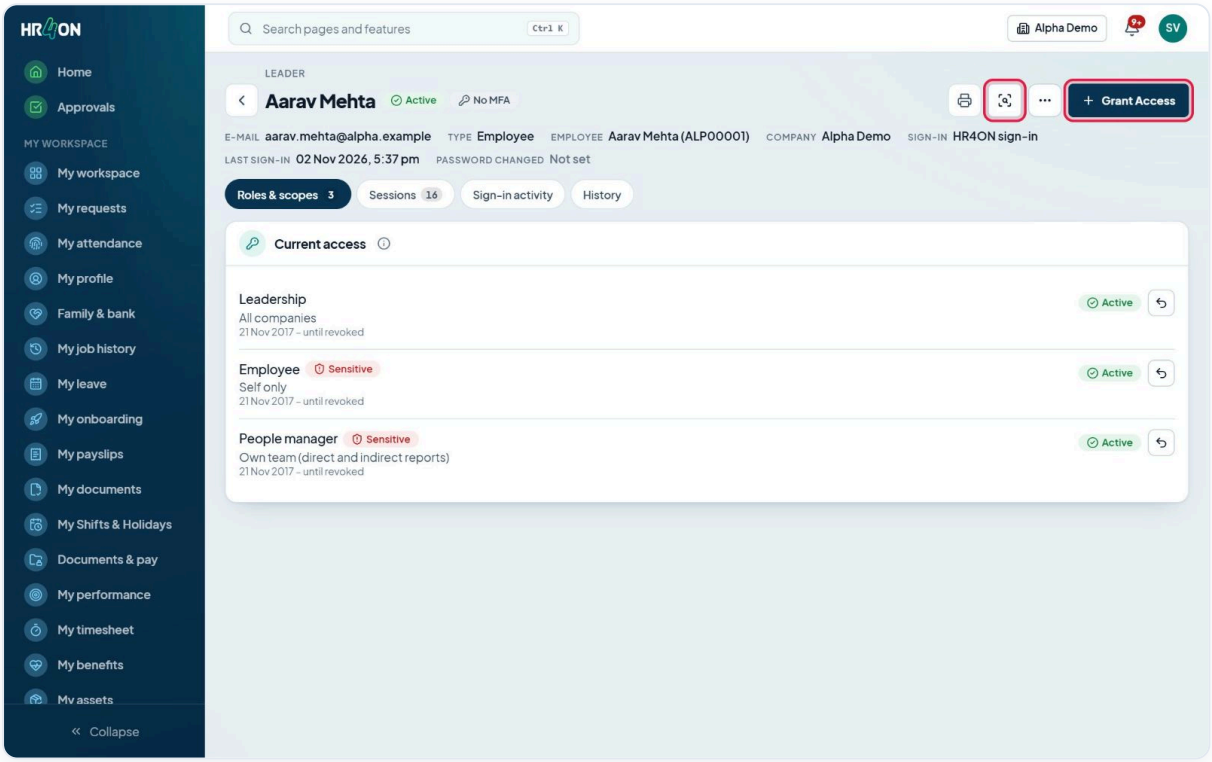
The user page shows who the person is, how they sign in, and every role they hold.

WHAT YOU SEE

- **Roles & scopes**: current access with dates, plus ended and revoked access.
- **Sessions**: devices currently signed in.
- **Sign-in activity**: recent sign-ins and security events.
- **History**: every change to the account.

HOW TO DO IT

1. Open the user from the list.
2. Select **Effective access** (the shield icon) to see exactly which permissions the user ends up with across all roles.



5.4 Grant a role and choose the data scope

Grant a role to give someone more access, for example making a new team lead a People manager. The scope decides whose records they can act on.

WHAT YOU SEE

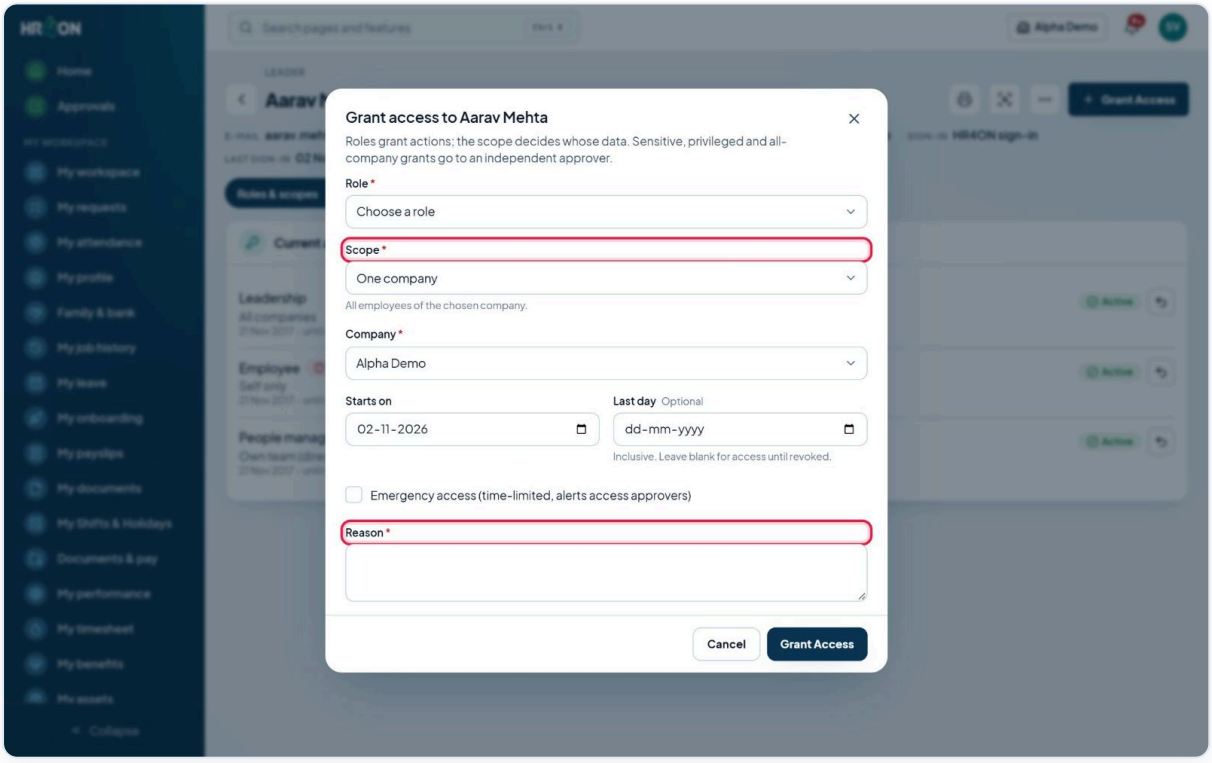
- **One company**: all employees of the chosen company.
- **Organisation unit**: a branch, department, team or location, including every unit below it.
- **Own team**: the user's direct and indirect reports. It follows reporting-line changes automatically.
- **Self only**: the user's own record.
- **All companies**: every company. Always needs approval.

HOW TO DO IT

1. Open the user and select **Grant Access**.
2. Choose the **Role** and **Scope**, then the company or unit.
3. Set **Starts on** and, for temporary access, **Last day**.
4. Enter a **Reason**.
5. Check the preview, then select **Grant Access** (or **Send for Approval** when the role is sensitive).

GOOD TO KNOW

- Sensitive and privileged roles (salary, payroll, audit, administration) go to an access approver before they take effect.
- **Emergency access** is time-limited, needs an **Accountable sponsor** and alerts the access approvers.
- Data scope is enforced everywhere, including reports and exports.



5.5 Lock, unlock, disable and reset sign-in

Use the **User actions** menu when someone is locked out, loses their phone, or leaves.

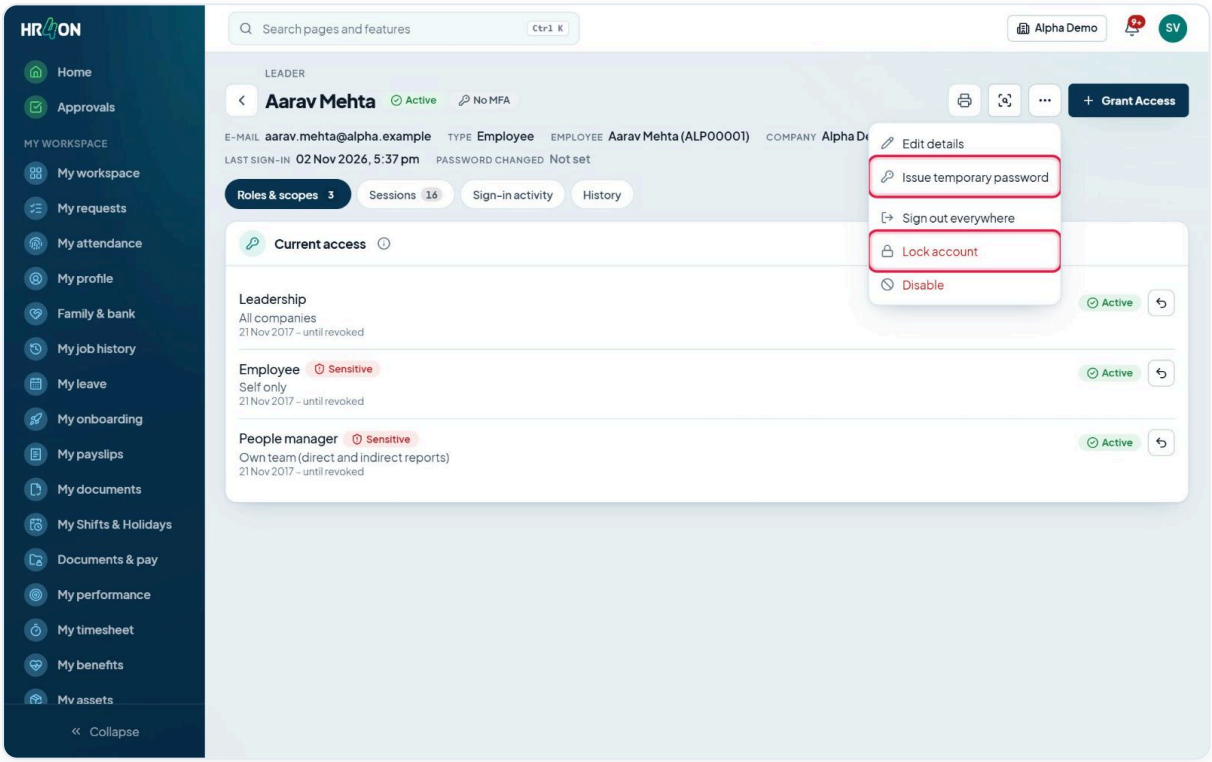
WHAT YOU SEE

- **Unlock**: lets a user back in after too many wrong passwords.
- **Lock account**: stops sign-in for now, for example while you investigate.
- **Disable** / **Enable**: switches the account off or on. Leavers are disabled automatically on their last day.
- **Issue temporary password**: gives a one-time password; the user must change it at next sign-in.
- **Reset authenticator (MFA)**: removes their authenticator so they can set up a new phone. It only shows for users who have set one up, just as **Unlock** only shows for a locked account.
- **Sign out everywhere**: ends every open session on every device.

HOW TO DO IT

1. Open the user.
2. Select **User actions** (the three dots).
3. Choose the action and confirm.

> **GOOD TO KNOW**
> - Every action is recorded in the user's **History** and in the audit log.
> - Never send a temporary password by e-mail in plain text; share it in person or by phone.



5.6 Two-step verification (MFA)

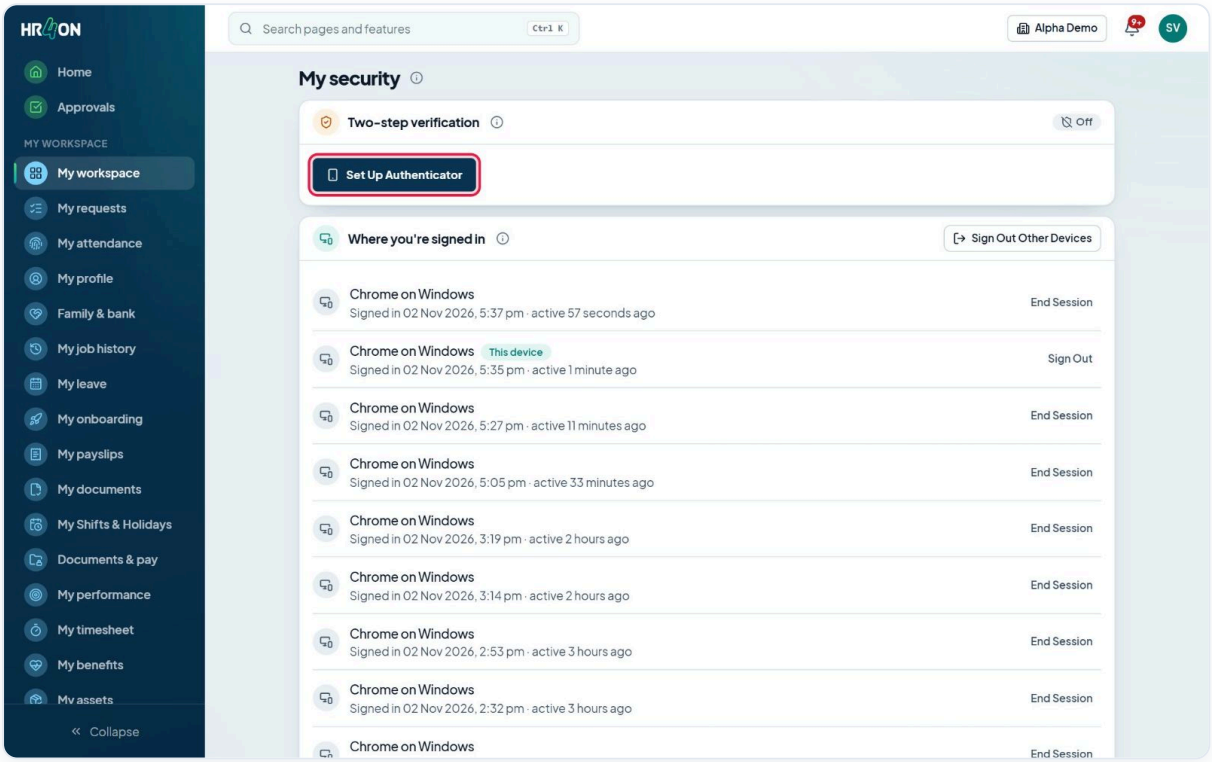
Two-step verification asks for a 6-digit code from an authenticator app at every sign-in. Each user sets it up for themselves on **Security** under My workspace.

HOW TO DO IT

1. Ask the user to open **Security** in My workspace.
2. They select **Set Up Authenticator**, scan the code with Microsoft Authenticator, Google Authenticator or similar, and type the 6-digit code.
3. If they lose their phone, use **Reset authenticator (MFA)** on their user page so they can set it up again.

GOOD TO KNOW

- Administrators, payroll and finance users should always use two-step verification.



5.7 Roles and permissions

Roles bundle permissions. HR4ON ships with system roles (Employee, People manager, HR operator, HR administrator, Payroll maker and checker, Finance releaser, Leadership, Auditor, Asset custodian, Case worker, Platform administrator). You can add your own.

WHAT YOU SEE

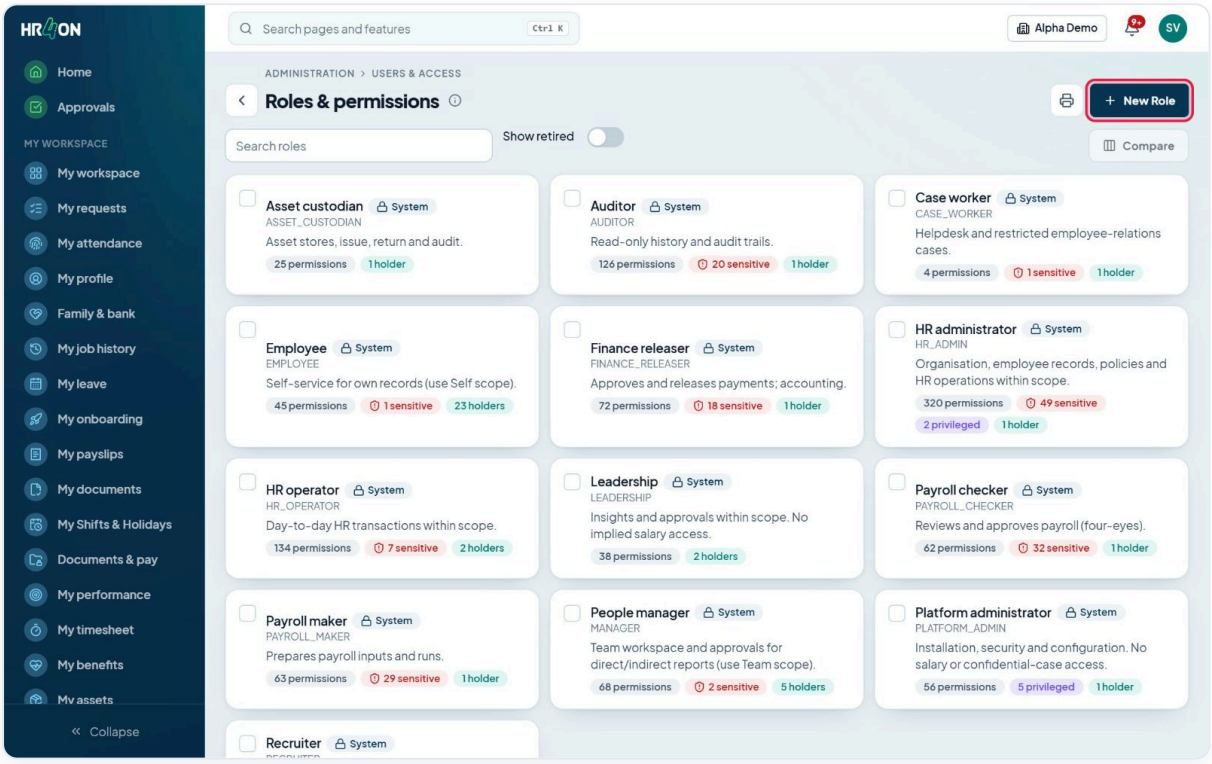
- Each card shows the role code, a short description, how many permissions it has, how many are sensitive or privileged, and how many people hold it.
- Select **Compare** on two to four roles to see their differences side by side.

HOW TO DO IT

1. Open **Users & access**, select **More access pages** and choose **Roles & permissions**.
2. Select a role to see its permissions and **Usual scope**.
3. To create one, select **New Role**, or open a role and choose **Clone**.

GOOD TO KNOW

- System roles cannot be edited; clone them instead.
- A change to a role's permissions that adds sensitive access goes for approval before it applies.



5.8 The access register

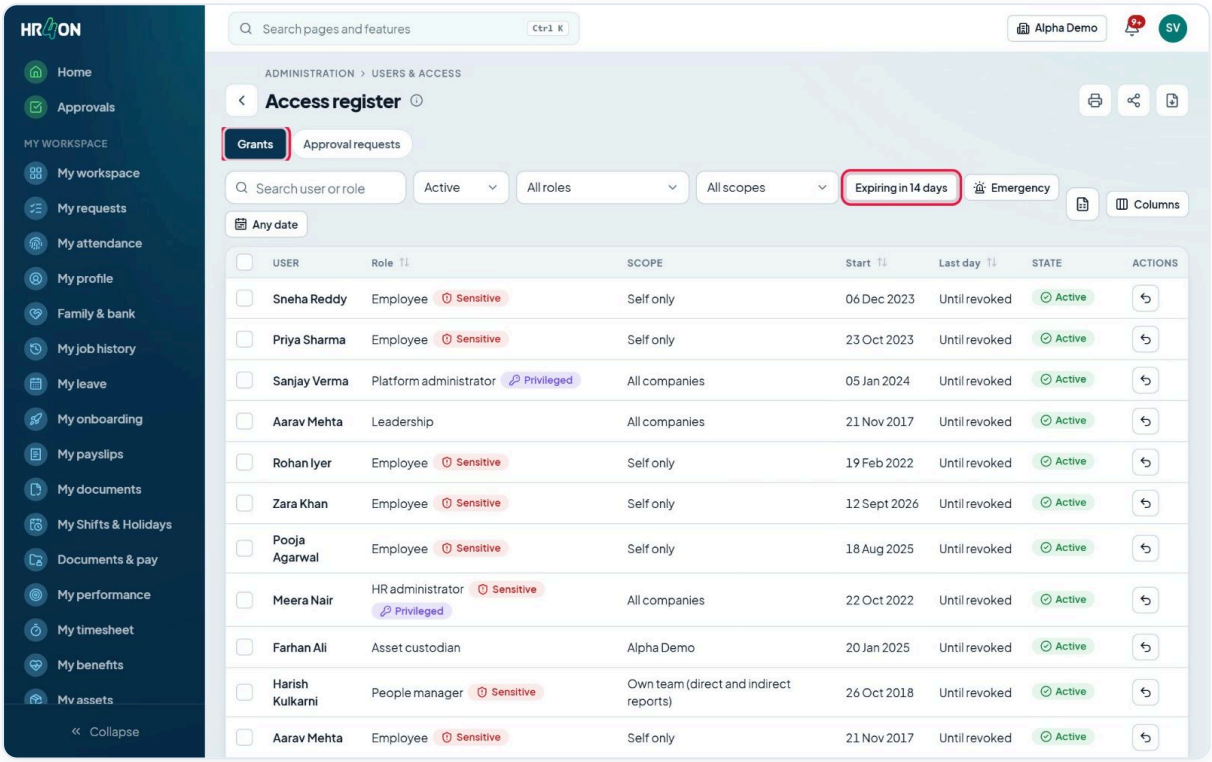
The access register lists every role grant across all users. Use it for audits and to tidy up access.

WHAT YOU SEE

- **Grants**: every current grant with start and last day.
- **Approval requests**: grants waiting for an access approver.
- **Expiring in 14 days**: temporary access about to end.
- **Emergency**: emergency grants.

HOW TO DO IT

1. Open **Users & access**, select **More access pages** and choose **Access register**.
2. Select **Revoke** on a row to remove a grant, with a reason.



5.9 Access reviews

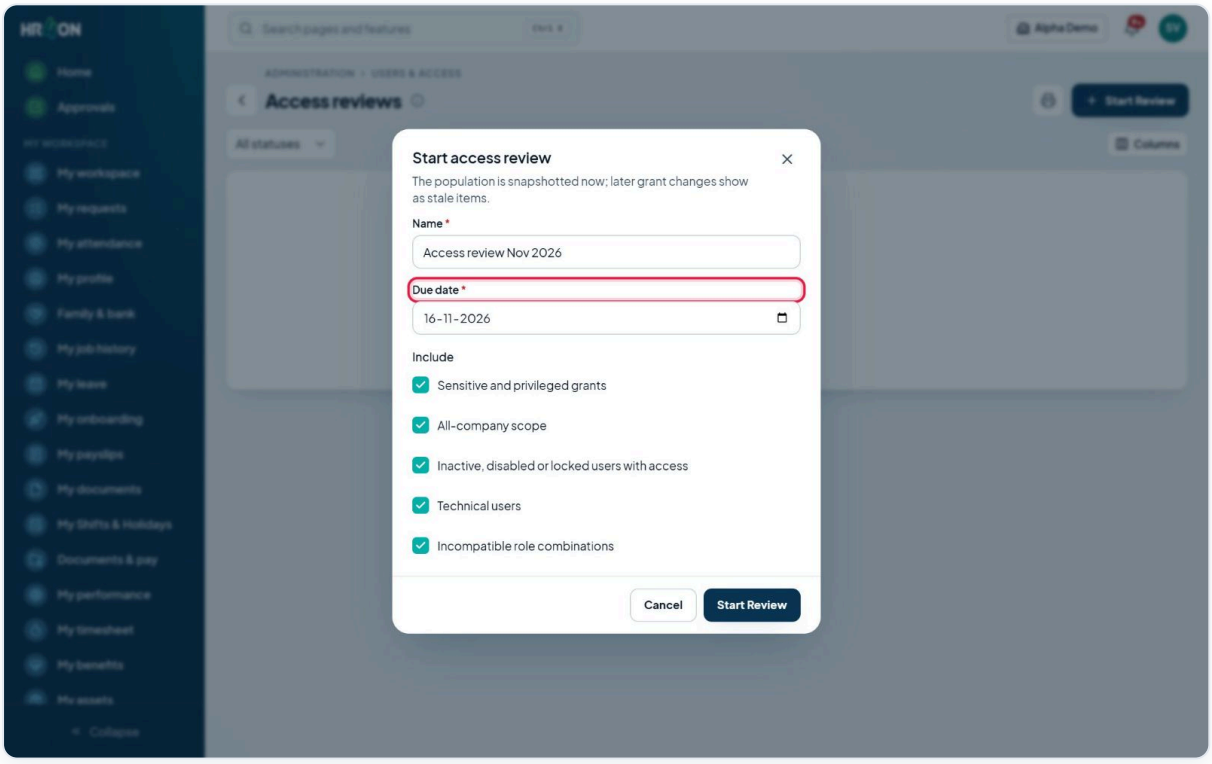
An access review asks managers or owners to confirm that people still need the access they have. Run one each quarter, or before an audit.

HOW TO DO IT

1. Open **Users & access**, select **More access pages** and choose **Access reviews**.
2. Select **Start Review**.
3. Enter a **Name** and **Due date**. Under **Include**, tick what reviewers should look at: **Sensitive and privileged grants**, **All-company scope**, **Inactive, disabled or locked users with access**, **Technical users** and **Incompatible role combinations**.
4. Select **Start Review**. Reviewers then keep or revoke each grant; open the review to follow progress.

GOOD TO KNOW

- The list of grants is captured when the review starts. Grants that change afterwards show as stale items.
- Access a reviewer marks as no longer needed is revoked when the review is completed.

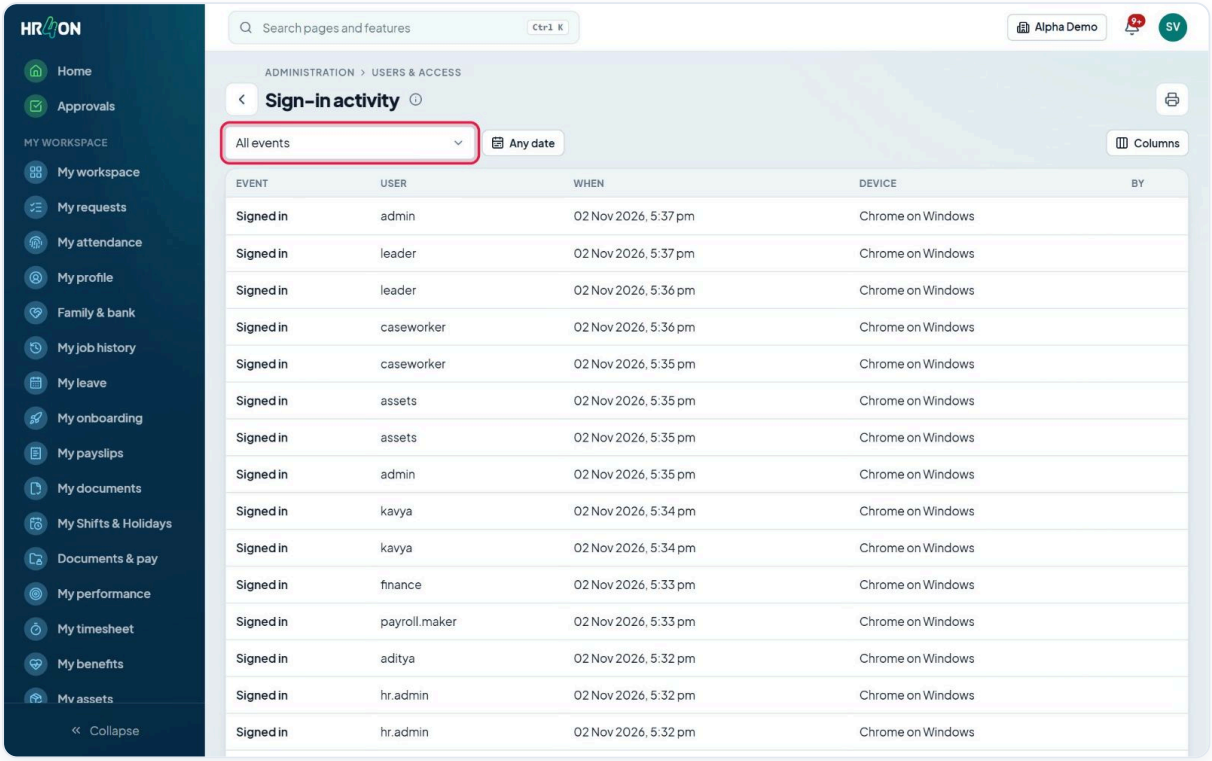


5.10 Sign-in activity

See every sign-in, failed sign-in, lock-out, password change and authenticator change. Use it when someone says they cannot get in, or when a security alert fires.

HOW TO DO IT

1. Open **Users & access**, select **More access pages** and choose **Sign-in activity**.
2. Choose an event type such as **Failed sign-in** or **Account locked**, and a date range.



06 Experience Studio: the home page

Experience Studio lets you change what everyone sees on HR4ON Home — seasonal greetings, highlight cards and celebrations — without waiting for an app release.

6.1 Occasion themes and seasonal greetings

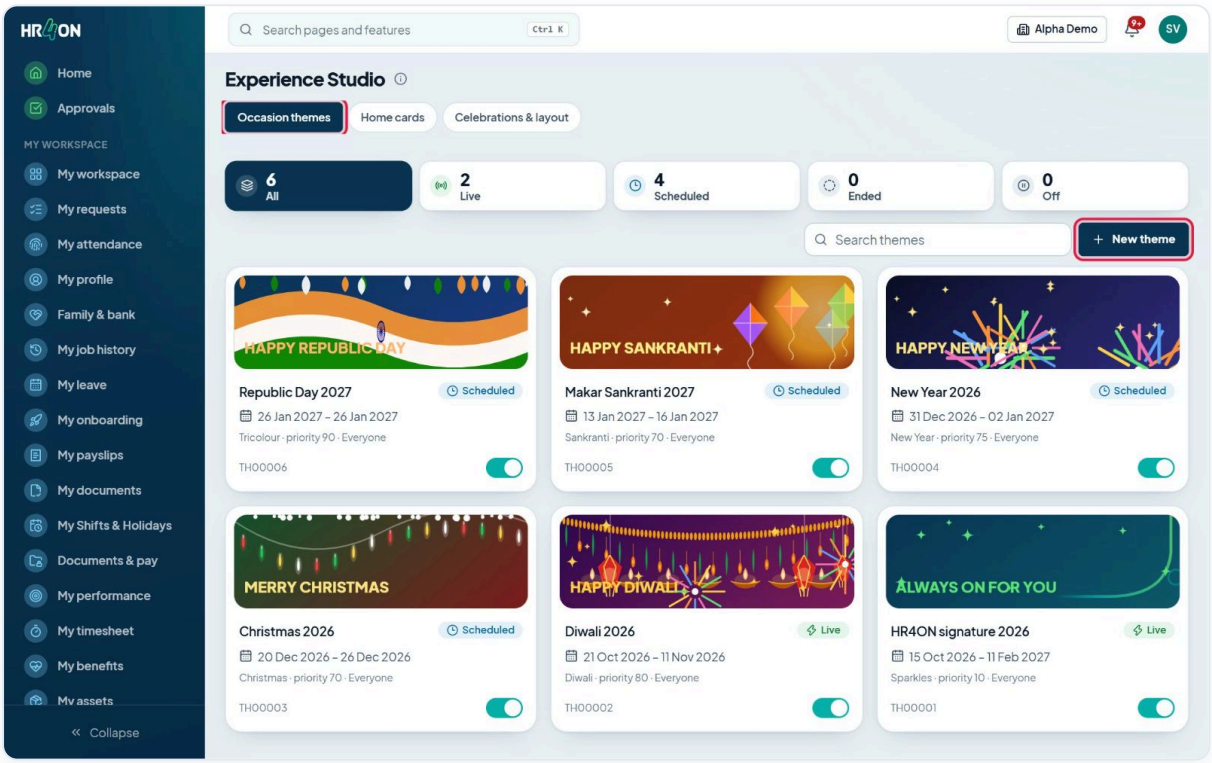
A theme dresses the home page banner for an occasion such as Diwali, Christmas or Republic Day, with a greeting, colours and an optional animation.

WHAT YOU SEE

- Count tabs: **Live** (showing now), **Scheduled** (will show on their dates), **Ended** and **Off**.
- Each card shows the greeting, dates, decoration, priority and audience.
- When two themes overlap, the one with the higher priority wins.

HOW TO DO IT

1. Select **Experience Studio**.
2. Stay on **Occasion themes**.
3. Select **New theme**, or open an existing one to change it.



6.2 Create or edit a theme

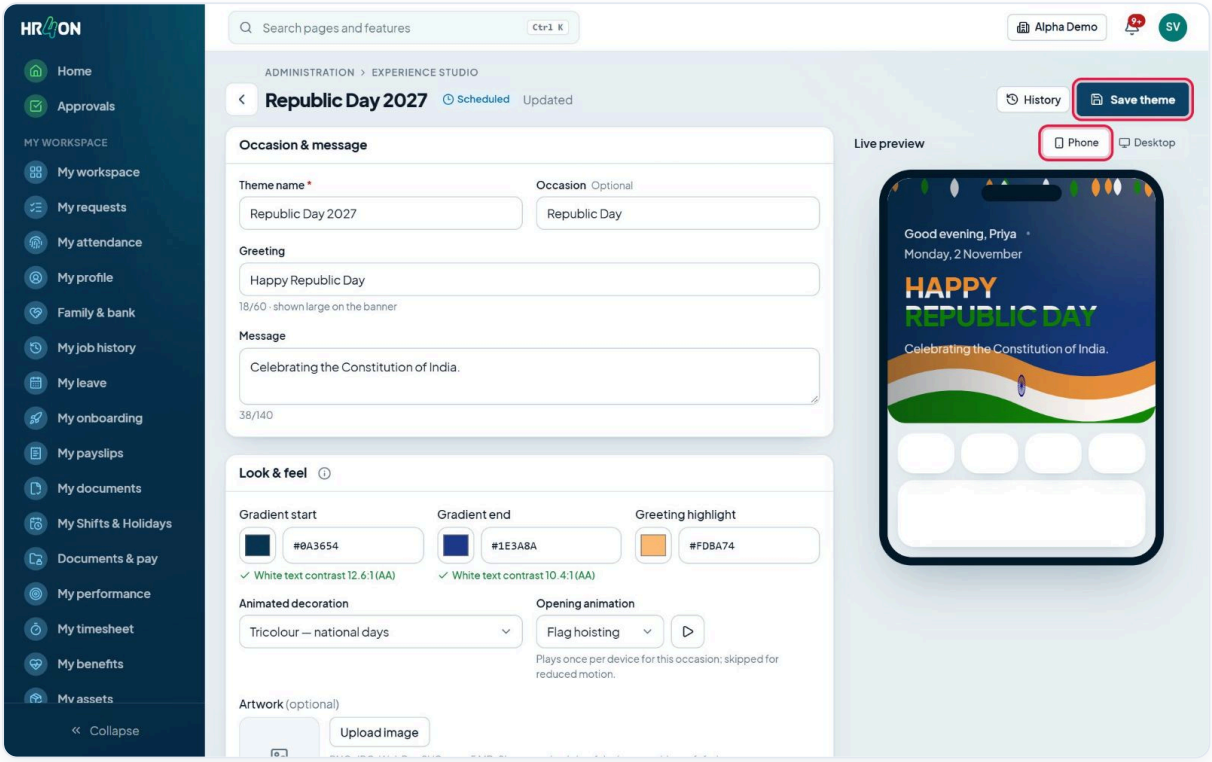
Build the greeting, choose the look, schedule it and choose who sees it. The preview on the right shows the banner on a phone or desktop.

HOW TO DO IT

1. Enter the **Theme name**, the **Greeting** (shown large on the banner) and a short **Message**.
2. Under **Look & feel** choose the gradient colours, the **Animated decoration** and the **Opening animation**.
3. Optionally **Upload artwork** (PNG, JPG, WebP or SVG up to 5 MB).
4. Under **Schedule & audience** set **Starts on**, **Ends on (inclusive)** and the priority, and choose **Everyone** or **Selected groups**.
5. Turn on **Enabled** and select **Save theme**.

GOOD TO KNOW

- HR4ON checks the text contrast against the colours you choose; keep it marked AA so the greeting stays readable.
- The opening animation plays once per device and is skipped for people who have reduced motion turned on.



6.3 Home cards

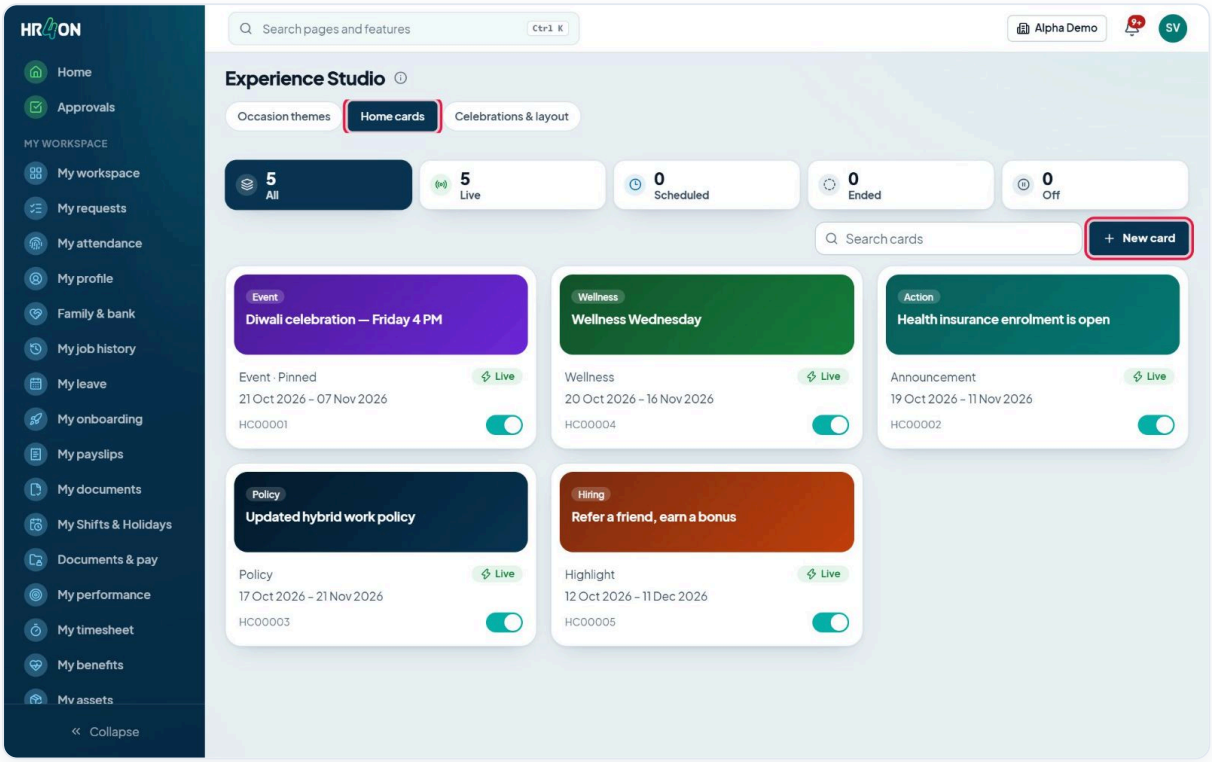
Home cards are short highlights on the home page: a policy reminder, an open-enrolment window, a link to a survey.

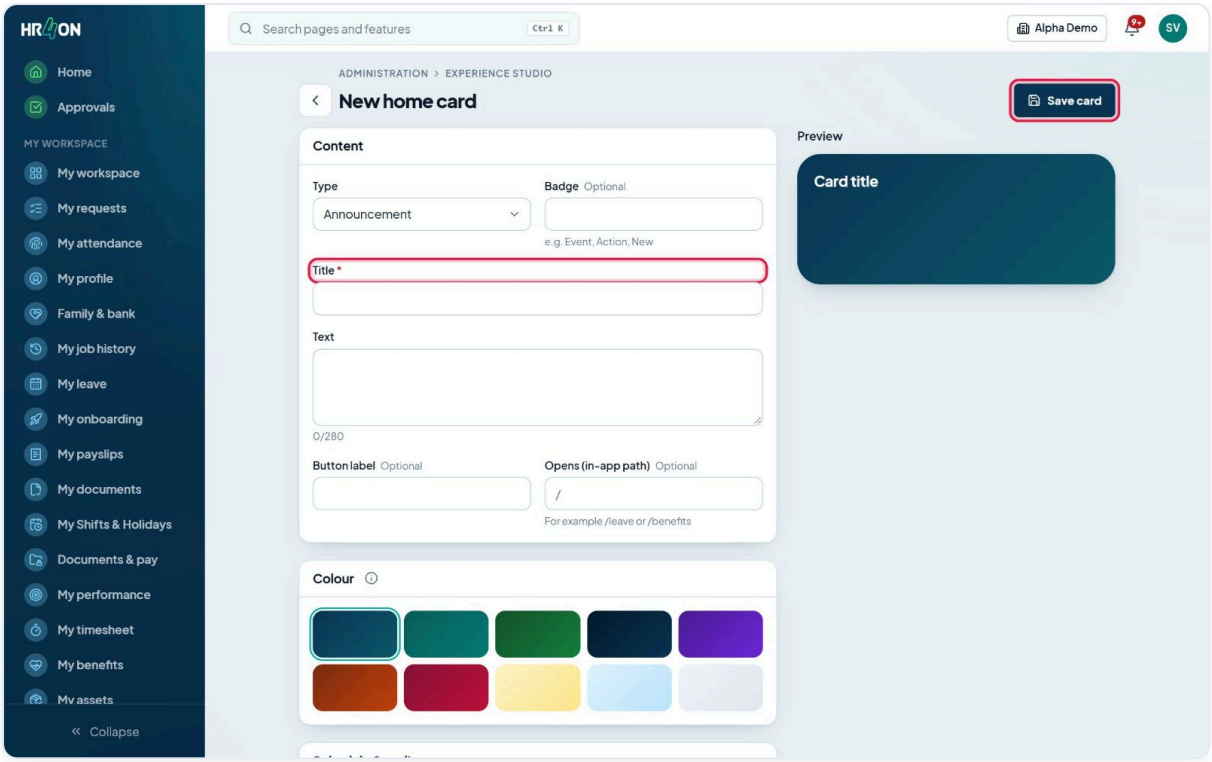
HOW TO DO IT

1. Open the **Home cards** tab and select **New card**.
2. Choose the **Type**, enter the **Title**, **Text**, an optional **Badge** and a **Button label** with the page it **Opens (in-app path)**.
3. Pick a colour, set **Starts on** and **Ends on (inclusive)**, and choose the audience.
4. Turn on **Pin to the front** for urgent cards, then select **Save card**.

GOOD TO KNOW

- Changing a live card asks you to confirm, because everyone sees the change straight away.





Creating a home card.

6.4 Celebrations and home layout

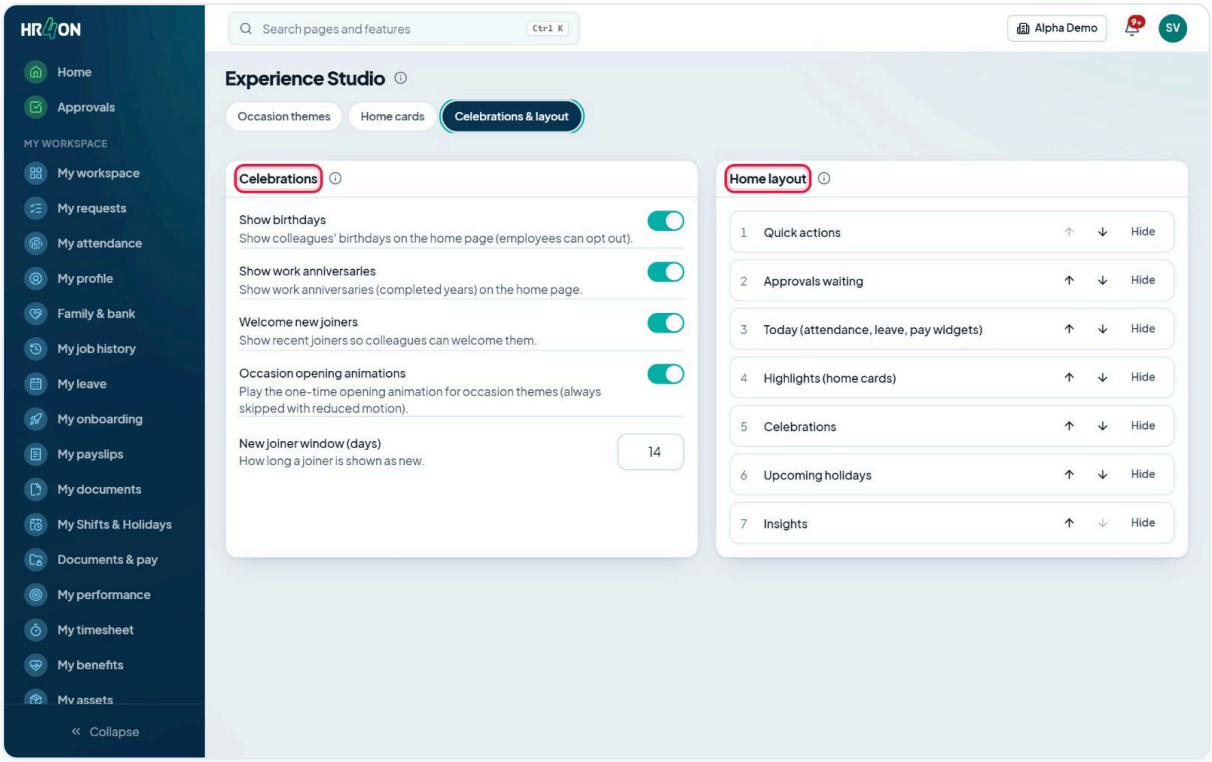
Choose which celebrations appear on Home and in what order the home sections show.

WHAT YOU SEE

- **Celebrations**: switch **Show birthdays**, **Show work anniversaries**, **Welcome new joiners** and **Occasion opening animations** on or off, and set the **New joiner window (days)**.
- **Home layout**: move sections up or down, **Hide** a section, or add a hidden one back.

GOOD TO KNOW

- Changes here save straight away and apply to everyone.
- Employees can always choose not to show their own birthday or anniversary.



07 Approval workflows

Every request that needs approval — leave, expenses, bank changes, offers, payroll runs — follows an approval chain. HR4ON has a sensible built-in chain for each request type. Create your own version when your organisation needs different steps.

7.1 The workflow catalogue

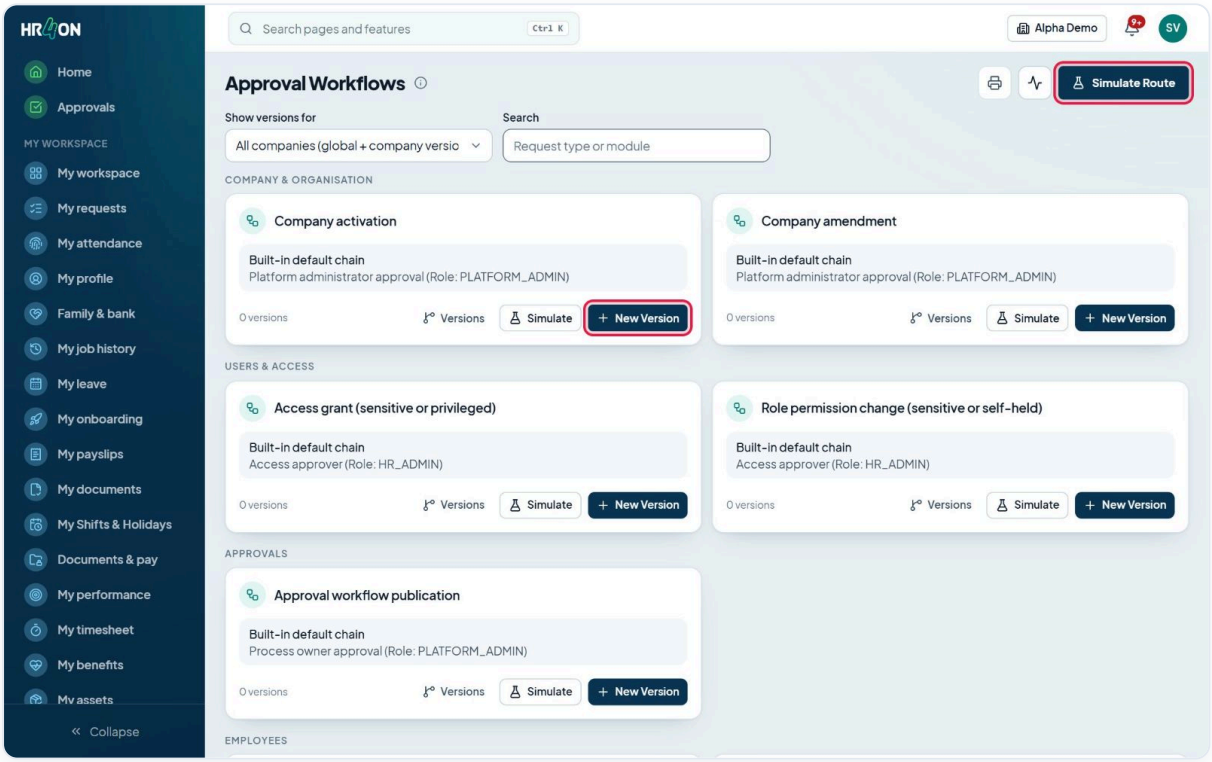
The catalogue lists every request type by module, with the chain it uses today.

WHAT YOU SEE

- **Built-in default chain** means no custom version has been published; the line below shows the default steps.
- **Versions** lists custom versions, **Simulate** tests the route, **New Version** starts a draft.
- **Show versions for** switches between global versions and versions for one company.

HOW TO DO IT

1. Select **Approval workflows**.
2. Use **Search** to find a request type, for example "leave".



7.2 Create a workflow version: scope and steps

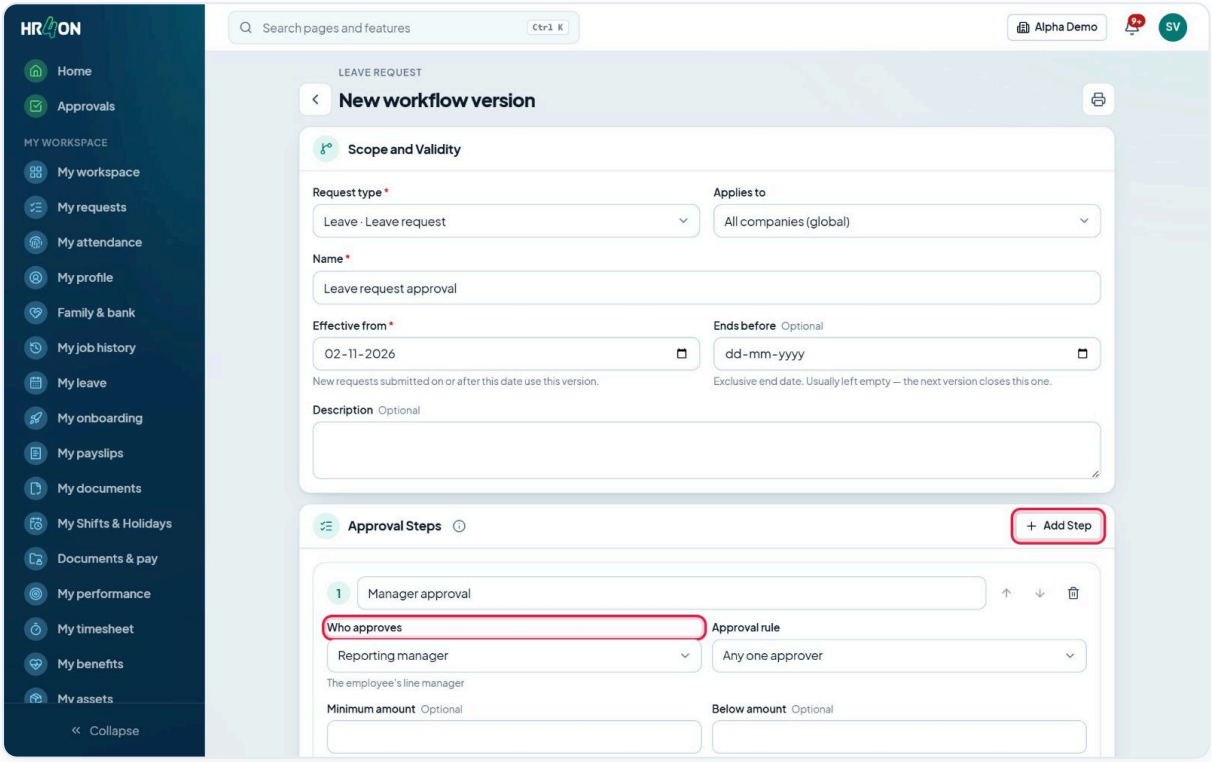
A workflow version sets who approves, in what order, and from which date. Use it to add an HR step to long leave, or a finance step to large expenses.

HOW TO DO IT

1. Select **New Version** on the request type.
2. Under **Scope and Validity** choose **Applies to** (all companies or one), the **Name** and **Effective from**.
3. Under **Approval Steps** select **Add Step** for each step. For each step choose **Who approves**: **Reporting manager**, **Skip-level manager**, **Department head**, **Role in scope** or **Named person**.
4. Choose the **Approval rule**: **Any one approver**, **Every approver (parallel)** or **Quorum (minimum number)**.
5. Use **Move up** and **Move down** to order the steps.

GOOD TO KNOW

- Steps run in order. A request that matches no step waits for an administrator, unless you turn on **Allow requests with no applicable step** under Controls (never allowed for payroll, bank, access or write-offs).



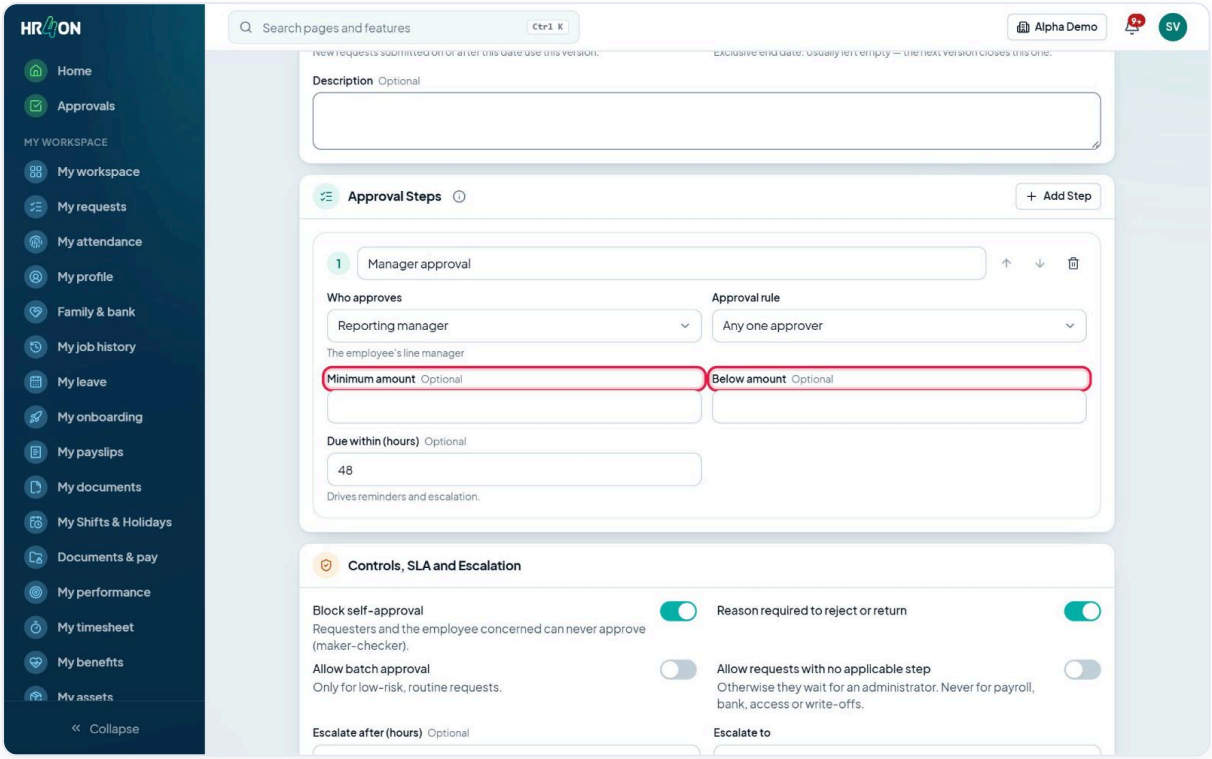
7.3 Conditions: amount ranges

For requests with an amount (expenses, loans, offers), a step can apply only within an amount range. For example: manager for everything, plus Finance at ₹50,000 or more.

HOW TO DO IT

1. In the step, enter **Minimum amount** (included) and/or **Below amount** (not included).
2. Leave both empty for a step that always applies.

> **TIP**
> - Use the **Test a Scenario** panel at the bottom with a sample employee and **Amount** to check which steps apply.



7.4 SLAs, reminders and escalation

Set how long each step should take, when approvers are reminded, and who is added when a request is overdue.

WHAT YOU SEE

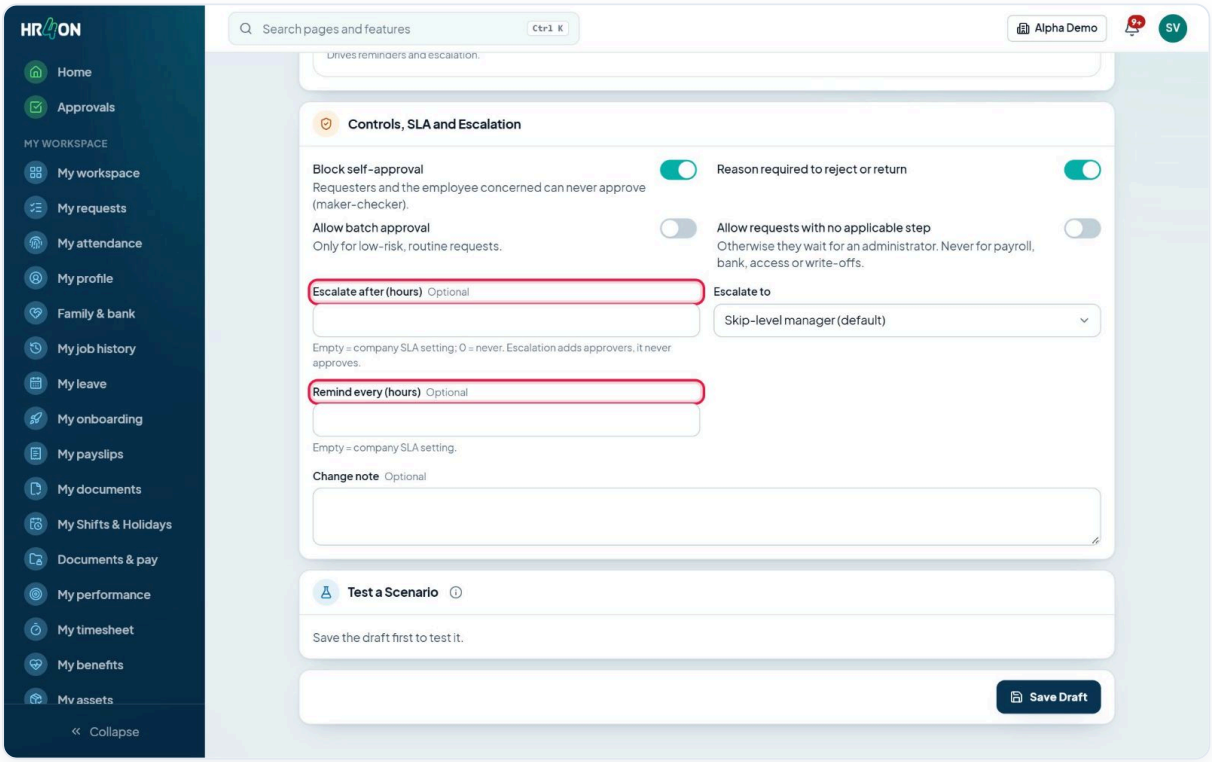
- **Due within (hours)** on a step drives its reminders and escalation.
- **Escalate after (hours)** and **Escalate to** add another approver (a role or a named person) when a step is late. Escalation adds approvers; it never approves on anyone's behalf.
- **Remind every (hours)** sets how often approvers are nudged.
- **Block self-approval**, **Reason required to reject or return** and **Allow batch approval** control how approvers decide.

HOW TO DO IT

1. Fill in **Controls, SLA and Escalation**.
2. Add a **Change note** explaining why this version exists.
3. Select **Validate**, then **Save Draft**.
4. Select **Publish** when ready.

GOOD TO KNOW

- Publishing needs an independent approver (maker-checker) by default. The draft shows **Waiting for publication approval** until it is accepted.
- Requests already in progress keep the version they started with. New requests use the new version from its **Effective from** date.
- Published versions are read-only. To change one, open it and select **New Version**.



7.5 Simulate a route

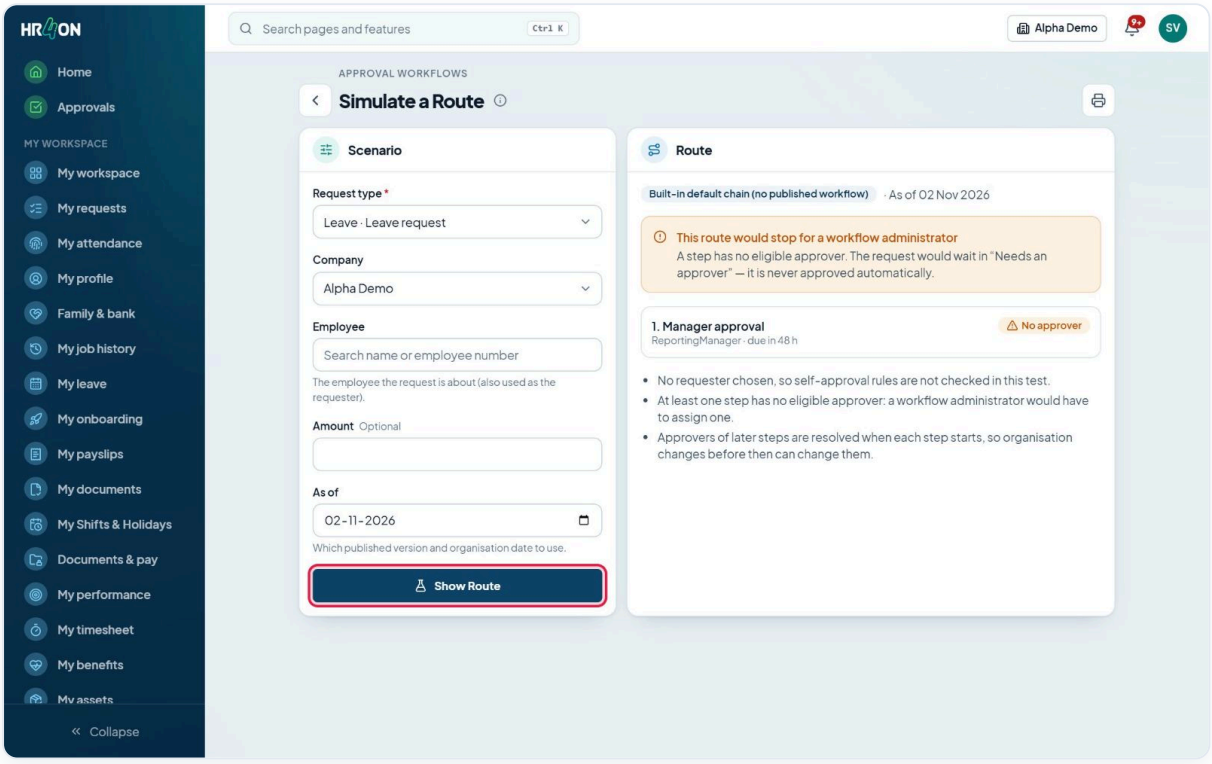
Before or after publishing, check exactly who would approve a request for a given employee and amount.

HOW TO DO IT

1. Select **Simulate Route** on the catalogue (or **Simulate** on a request type).
2. Choose the **Request type**, the company or employee, and an amount if relevant.
3. Select **Show Route** to see each step and the people it resolves to.

GOOD TO KNOW

- Choose an **Employee** to see the actual approvers. With only a company chosen, steps such as **Reporting manager** show **No approver**, and HR4ON warns that the route would stop for a workflow administrator.



7.6 Workflow defaults in Settings

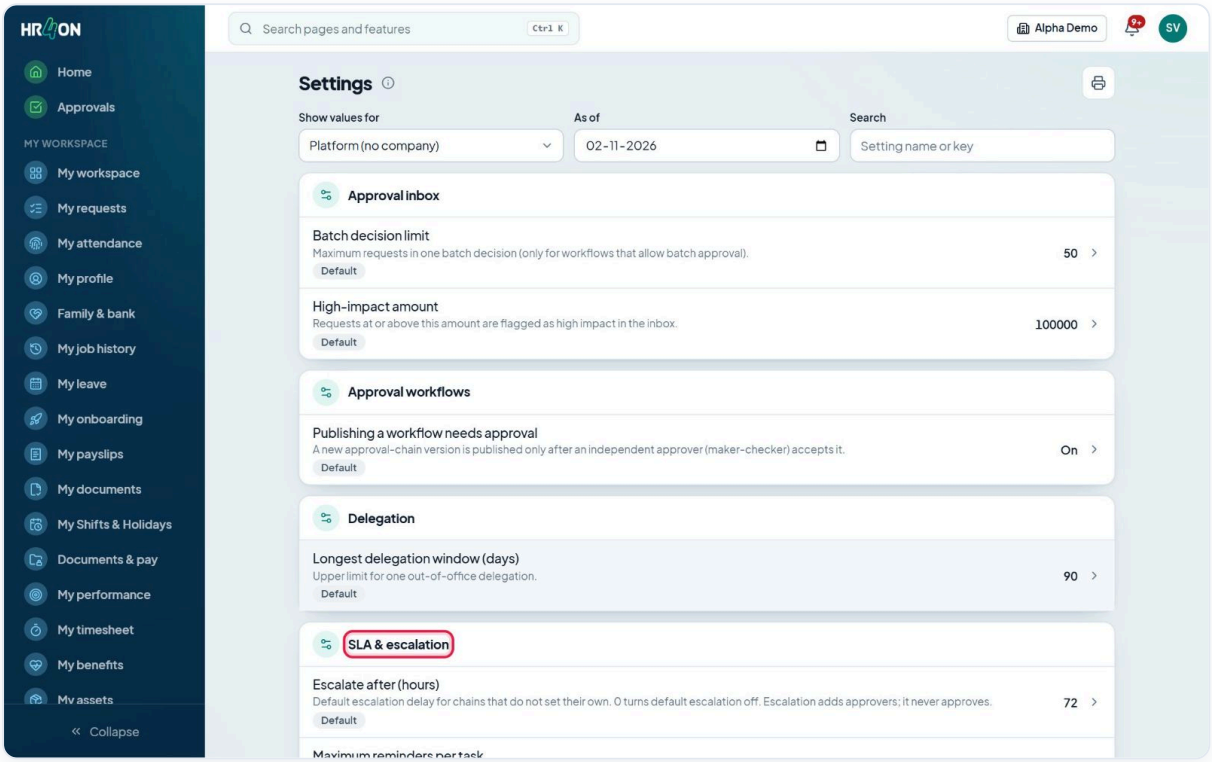
Default reminder and escalation times, the batch decision limit and whether publishing a workflow needs approval are system settings.

WHAT YOU SEE

- **Escalate after (hours)**: default for chains that do not set their own (0 turns default escalation off).
- **Maximum reminders per task** and **Reminder interval (hours)**.
- **Publishing a workflow needs approval**: maker-checker on workflow changes.
- **Longest delegation window (days)** for out-of-office delegations.

HOW TO DO IT

1. Open **Settings** and look under **Approval workflows** and **SLA & escalation**.
2. See the Settings chapter for how to change a value.



08 Monitoring approvals and rerouting

The workflow monitor shows every approval request in the system, so you can spot stuck requests before employees chase you.

8.1 The workflow monitor

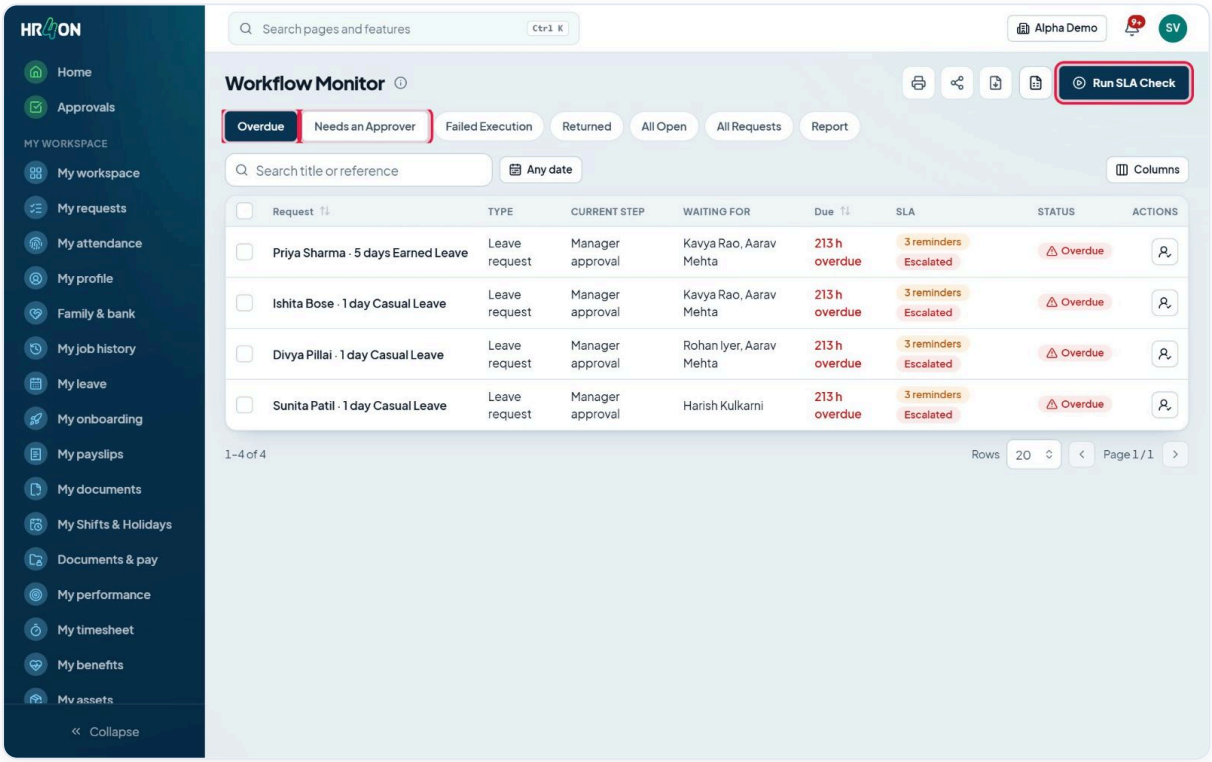
Use the monitor daily to catch overdue requests, requests with no approver and failures.

WHAT YOU SEE

- **Overdue**: past their due time.
- **Needs an Approver**: no one could be found for a step, for example because the manager left.
- **Failed Execution**: approved, but the follow-up action failed and needs a retry.
- **Returned**: sent back to the employee for changes.
- **SLA** shows hours overdue, reminders sent and whether the request was escalated.
- **Report** shows charts by process, by status, by age and turnaround by step.

HOW TO DO IT

1. Select **Workflow monitor**.
2. Select a tab to filter.
3. Select a request to open it.
4. Select **Run SLA Check** to send due reminders and escalations now instead of waiting for the next scheduled run.



8.2 Reassign or assign an approver

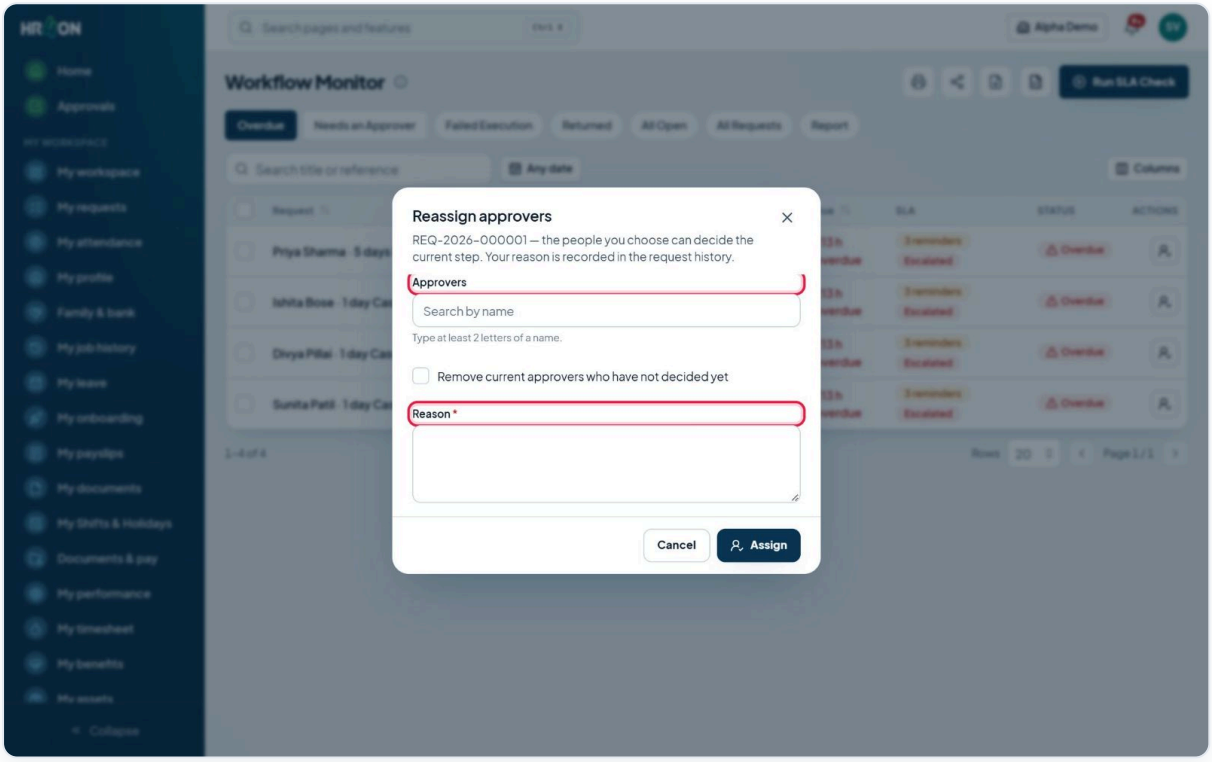
When an approver is away or has left, move the step to someone else so the request does not wait.

HOW TO DO IT

1. In the monitor, select **Reassign approvers** (or **Assign approver**) on the row.
2. Choose the new **Approvers**.
3. Tick **Remove current approvers who have not decided yet** if they should no longer see it.
4. Enter a **Reason** and select **Assign**.

GOOD TO KNOW

- The employee and the new approver are notified. The change is recorded in the request history.



8.3 Approval rerouting after manager changes

HR administrator. When an employee moves to a new manager, open requests waiting on the old manager need a decision: move them to the new manager or keep them where they are. HR4ON lists them here.

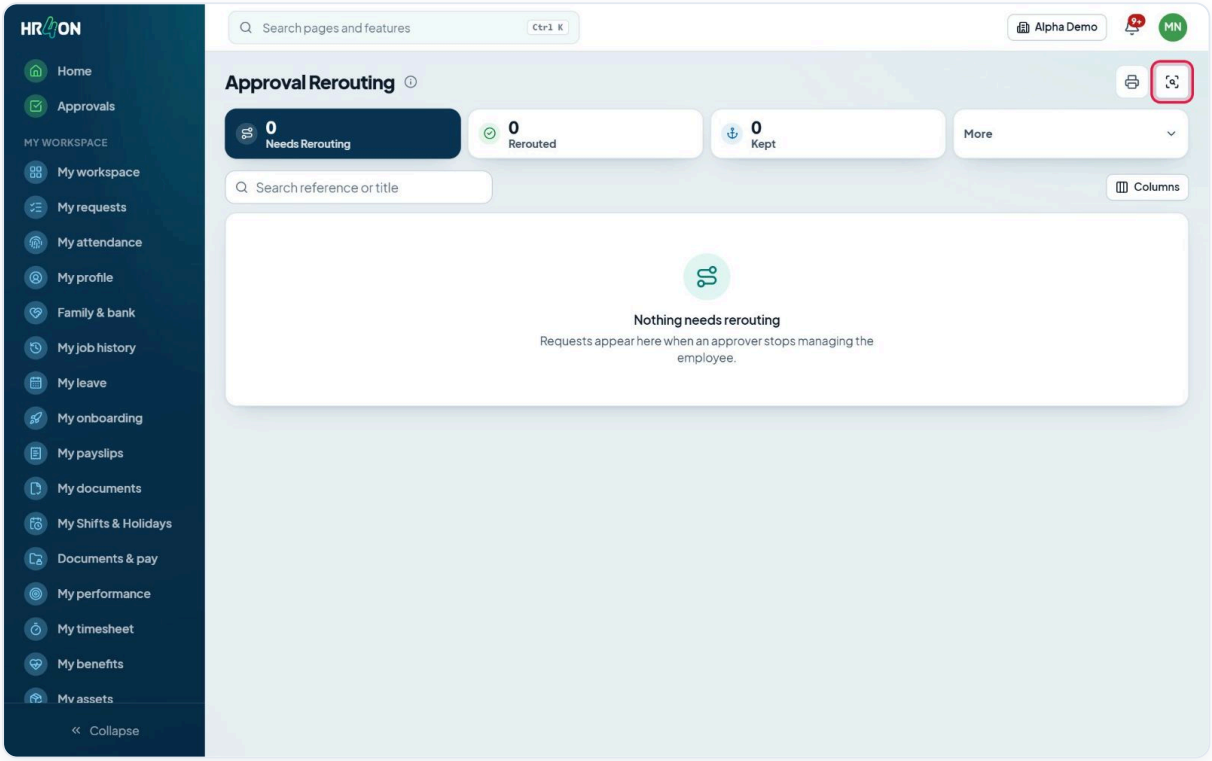
WHAT YOU SEE

- **Needs Rerouting**: requests whose approver no longer manages the employee.
- **Rerouted**: moved to the new manager.
- **Kept**: deliberately left with the original approver.

HOW TO DO IT

1. Sign in as an HR administrator and open **Approval Rerouting** in the Administration menu.
2. Select **Check for manager changes now** (the search icon at the top right) to look for new cases straight away.
3. For each request, choose to reroute or keep it.

> **GOOD TO KNOW**
> - The platform administrator cannot open this screen; it belongs to the HR administrator.



09 Integrations

Integrations connect HR4ON to other systems: banks, accounting, directories, attendance devices and any system that wants to receive HR events. In this demo every connector is a labelled simulator; no data leaves HR4ON.

9.1 Connectors overview

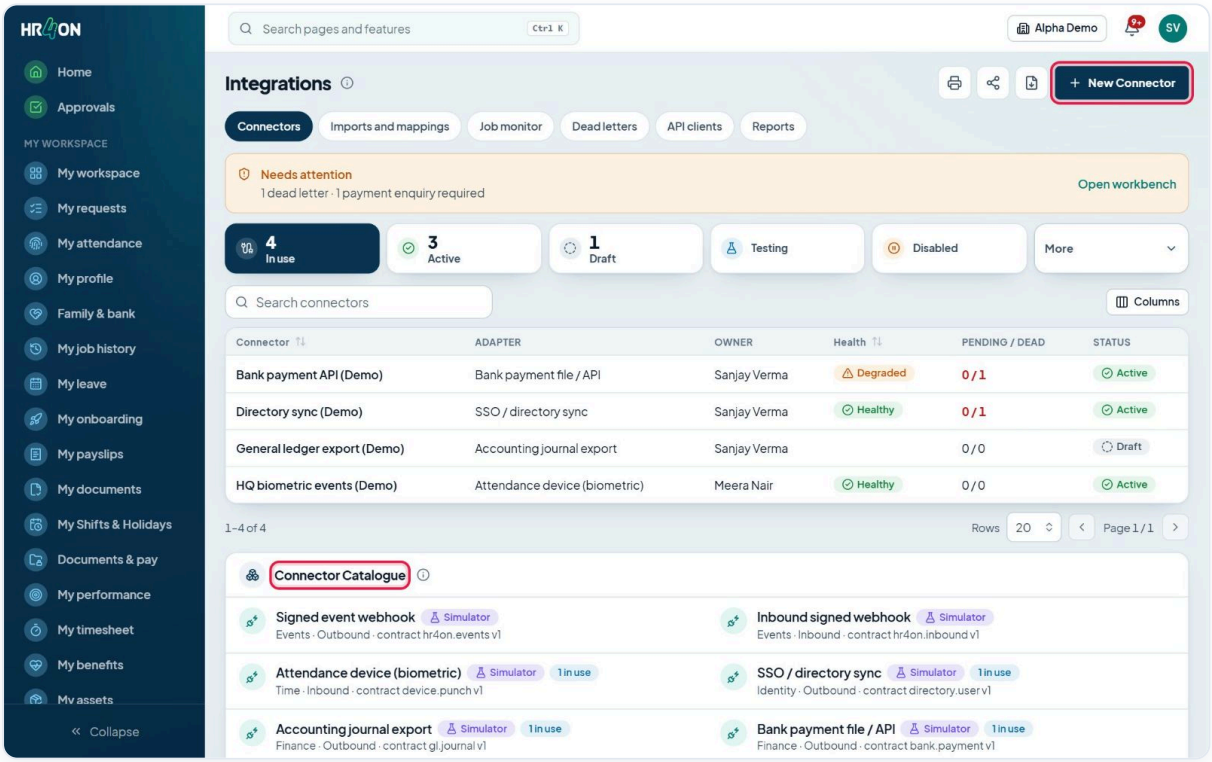
The Integrations hub lists every connector with its owner, health and pending or failed deliveries, plus the catalogue of connector types you can add.

WHAT YOU SEE

- **Health**: **Healthy**, **Degraded** or failing, based on recent deliveries.
- **PENDING / DEAD**: messages waiting, and messages that failed after every retry.
- **Needs attention** at the top highlights dead letters and payment enquiries.
- **Connector Catalogue** shows the adapters available: signed event webhooks, attendance devices, directory sync, accounting export, bank payment.

HOW TO DO IT

1. Select **Integrations**.
2. Select **Open** on a connector to see its details.



9.2 Open and test a connector

The connector page shows its purpose, the data it may carry, where it sends data, and its deliveries and secrets.

WHAT YOU SEE

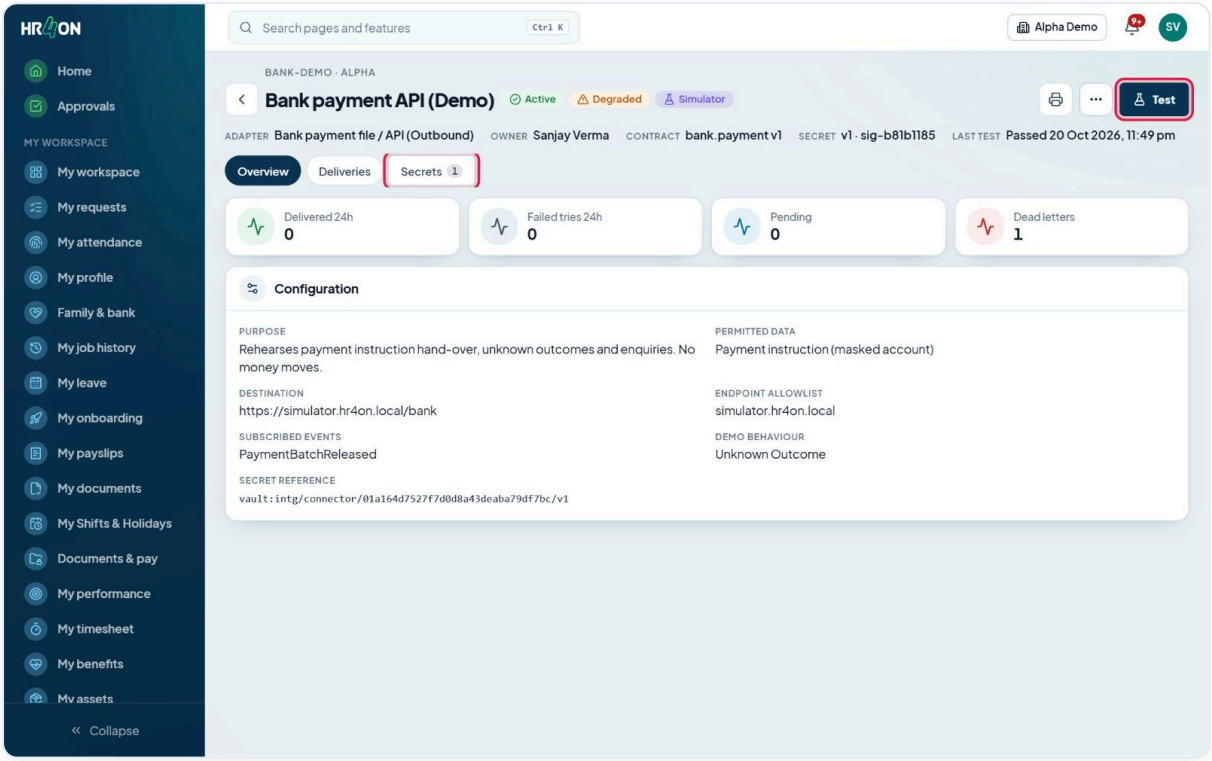
- **Overview**: configuration, permitted data and subscribed events.
- **Deliveries**: each message sent, with attempts and outcome.
- **Secrets**: the signing secret versions; use **Rotate** to replace a secret.

HOW TO DO IT

1. Open the connector.
2. Select **Test** to send a test message.
3. Use **Connector actions** to **Configure**, **Disable** or **Retire** it.

GOOD TO KNOW

- A connector can only send the data categories listed under **Permitted data**, and only to addresses on the **Endpoint allowlist**.



9.3 Webhooks: send HR events to another system

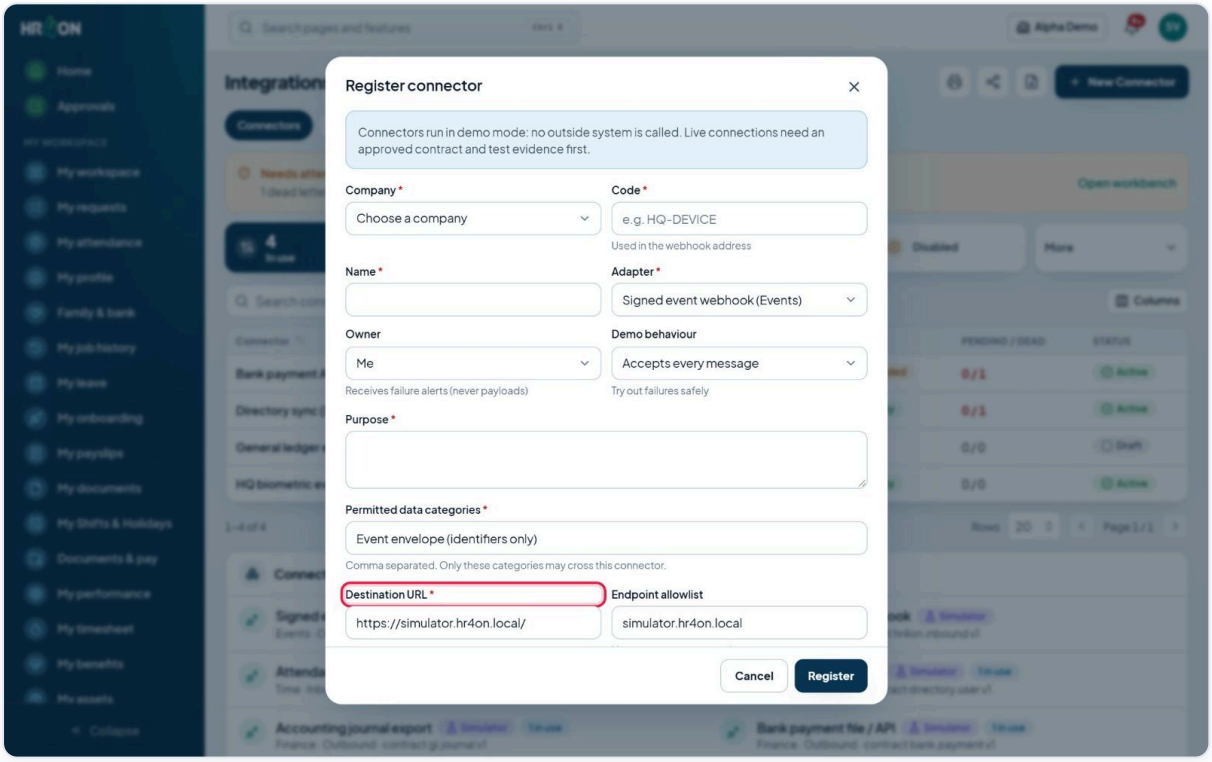
A signed event webhook sends HR4ON events (for example an employee joining or leaving) to another system, which can check the signature to trust the message.

HOW TO DO IT

1. Select **New Connector**.
2. Choose the **Company**, enter a **Code** (used in the webhook address) and a **Name**.
3. Choose the **Adapter** **Signed event webhook** and the **Owner**, who receives failure alerts.
4. Describe the **Purpose** and list the **Permitted data categories**, separated by commas.
5. Enter the **Destination URL** and the **Endpoint allowlist**, and choose the **Subscribed events**.
6. Select **Register**. Then open the connector, **Set Secret**, select **Test**, and **Enable** it.

GOOD TO KNOW

- **Demo behaviour** lets you try out failures safely while testing.
- Incoming webhooks (other systems sending to HR4ON) use the **Inbound signed webhook** adapter and show a **Webhook address** to give the other system.



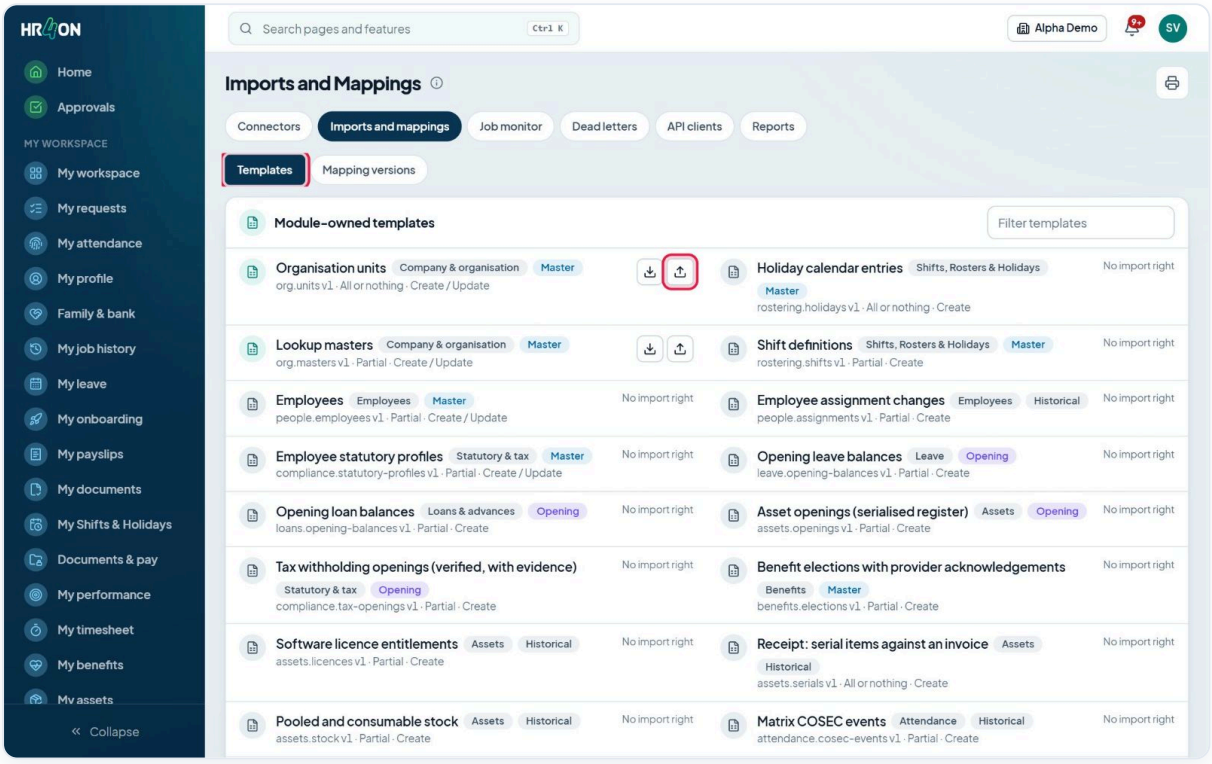
9.4 Imports and data templates

Load data in bulk with module-owned templates: organisation units, masters, holiday calendars, shifts, employees and more.

HOW TO DO IT

1. Open **Integrations** and select **Imports and mappings**.
2. Select **Download … template** for the data you want to load.
3. Fill it in, then select **Import …** and upload it.
4. Check the preview. Imports marked **All or nothing** load nothing if one row is wrong; **Partial** imports load the good rows and list the rest.

> **TIP**
>
> - Follow progress and download error files on **Job monitor**.



9.5 Job monitor, dead letters and exports

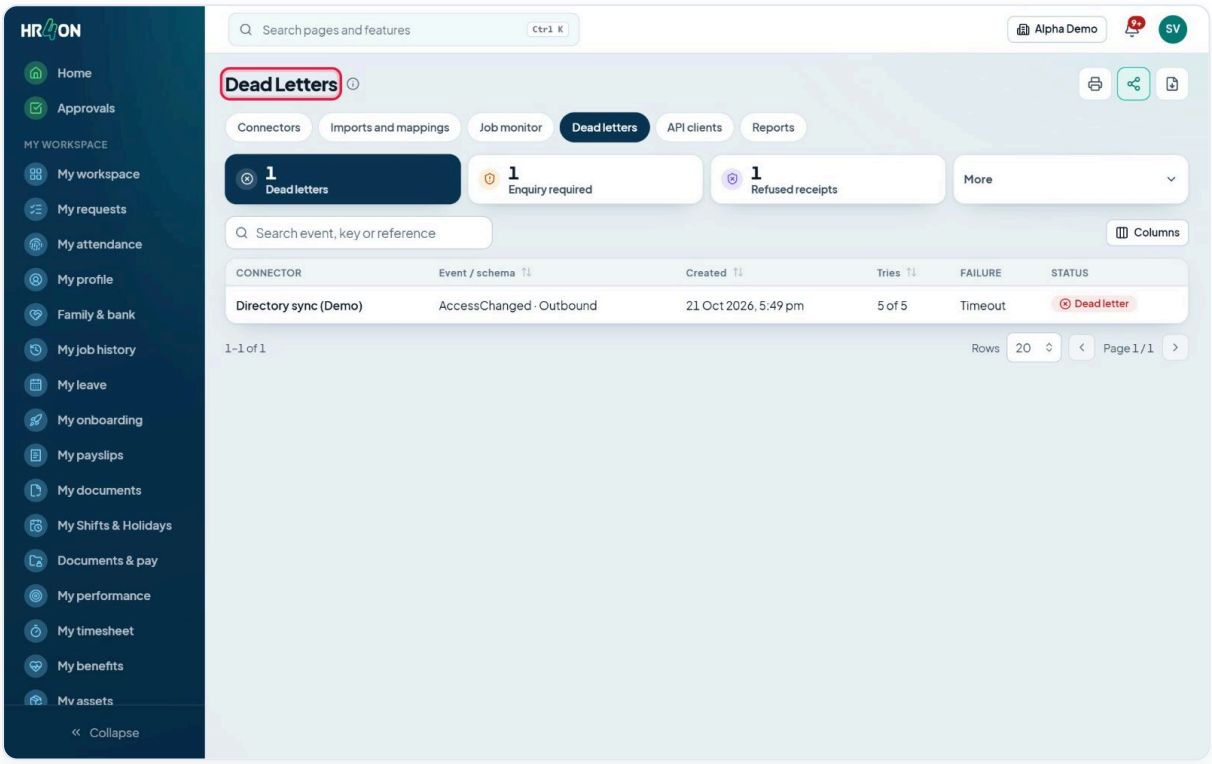
Check imports and outgoing deliveries, and deal with messages that failed after every retry.

WHAT YOU SEE

- **Job monitor**: imports and deliveries with **Staged**, **Running**, **Completed**, **Partial** or **Failed**.
- **Dead letters**: deliveries that gave up, with the failure reason and number of tries; replay them once the other system is fixed.
- **API clients**: other systems allowed to read from HR4ON, with their scopes and rate limits.

HOW TO DO IT

1. Open **Integrations** and select **Dead letters**.
2. Open the message, fix the cause, and replay it.



9.6 Attendance devices and Matrix COSEC

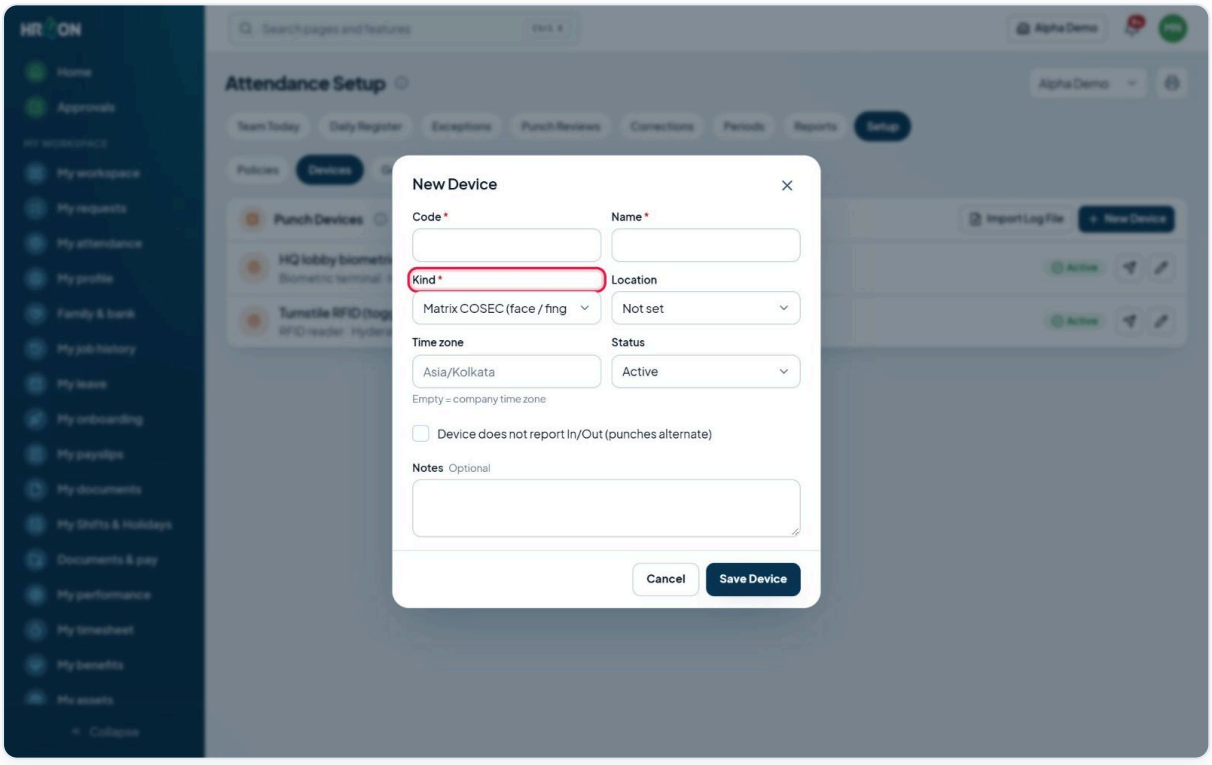
HR administrator. Biometric terminals, RFID readers, face kiosks and Matrix COSEC controllers are registered under Attendance Setup. HR4ON never counts the same punch twice, and unknown badges go to a resolution queue.

HOW TO DO IT

1. Sign in as an HR administrator and open **Attendance**, then **Setup**, then the **Devices** tab.
2. Select **New Device**, enter the **Code** and **Name**, and choose the **Kind**: **Biometric terminal**, **Matrix COSEC (face / finger / card)**, **RFID reader**, **Face kiosk** or **Demo device**.
3. Choose the **Location** and **Time zone**, and tick **Device does not report In/Out (punches alternate)** for readers that do not send a direction.
4. For a Matrix COSEC device, open its **Matrix COSEC connection** and choose **Pull from Server** (HR4ON reads the COSEC server) or **Device Pushes** (the device sends punches to HR4ON with a device key).
5. Use **Test Connection** and **Sync Now**, and map any **Unmapped COSEC users** to employees.

GOOD TO KNOW

- A device key is shown only once when issued or rotated. Enter it on the device straight away.
- Badge numbers are linked to employees on the **Badge Mappings** tab.



10 Self-service help answers

HR administrator. Help answers are the short questions and answers employees find on **Help** in My workspace, such as "How do I apply for leave?". Good answers cut helpdesk tickets.

10.1 Manage help answers

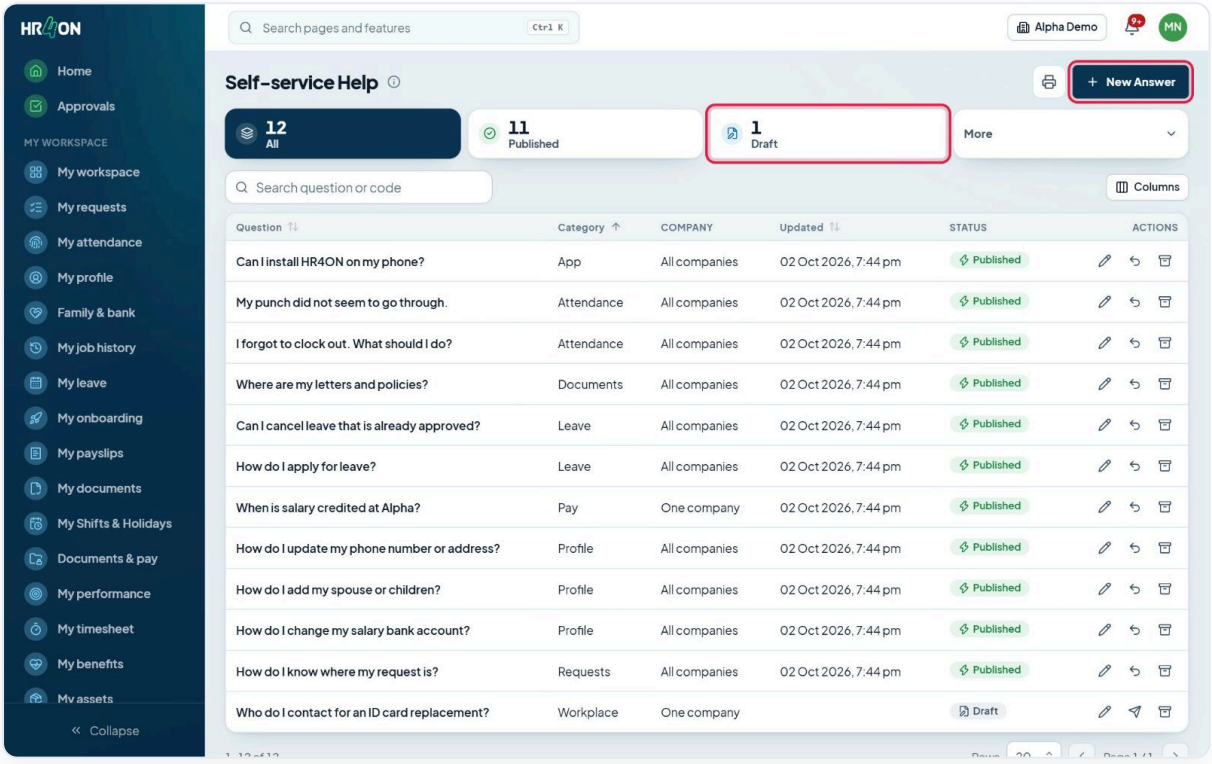
See every answer with its category, company and status, and publish, unpublish or retire it.

WHAT YOU SEE

- **Published**: employees can see it.
- **Draft**: being written.
- **Retired**: no longer shown, kept for history.
- **COMPANY**: **All companies** or one company only (for example salary credit dates).

HOW TO DO IT

1. Sign in as an HR administrator and open **Self-service help** in the Administration menu.
2. Use **Edit**, **Publish**, **Unpublish** or **Retire** on a row.



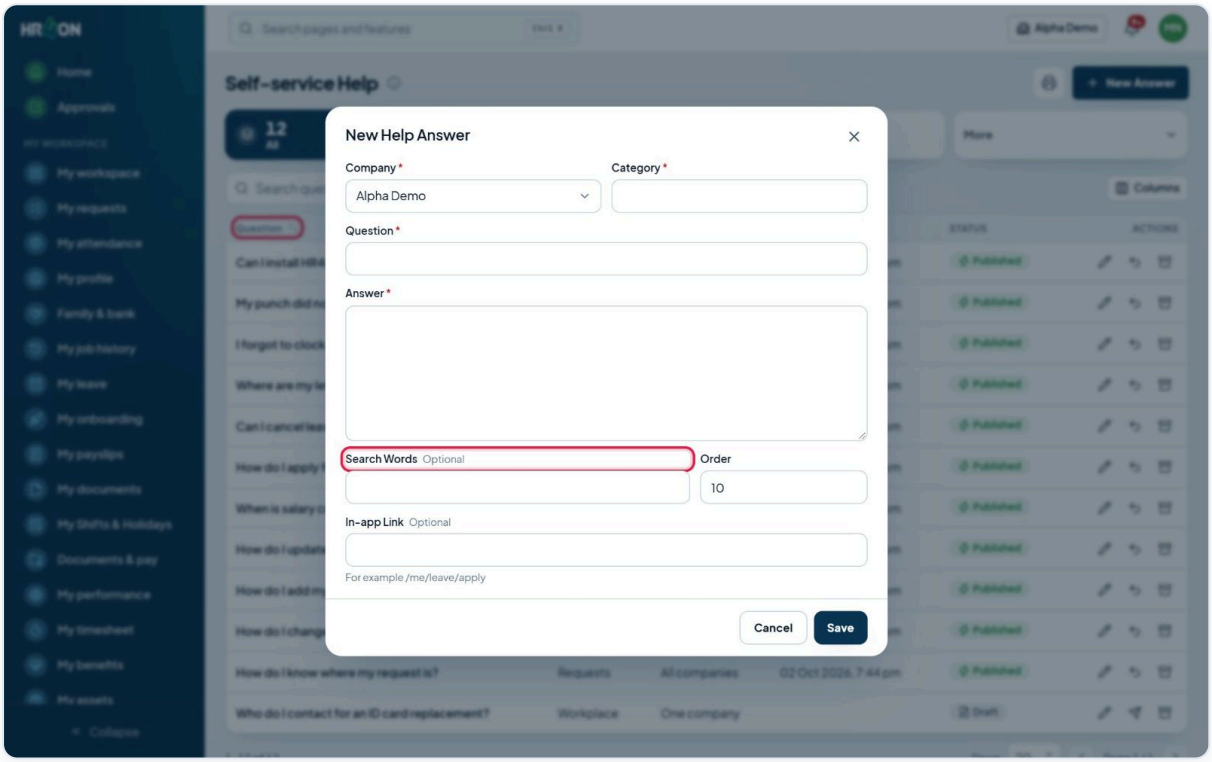
10.2 Write a new answer

HOW TO DO IT

1. Select **New Answer**.
2. Type the **Question** the way an employee would ask it, and the **Answer** in plain words.
3. Choose the **Category** and **Company**.
4. Add **Search Words** people might type, and an **In-app Link** to the page that solves the problem.
5. Set the **Order** in its category and select **Save**. Then **Publish** it.

TIP

- Keep answers to a few sentences and link to the screen that does the job.



11 Settings

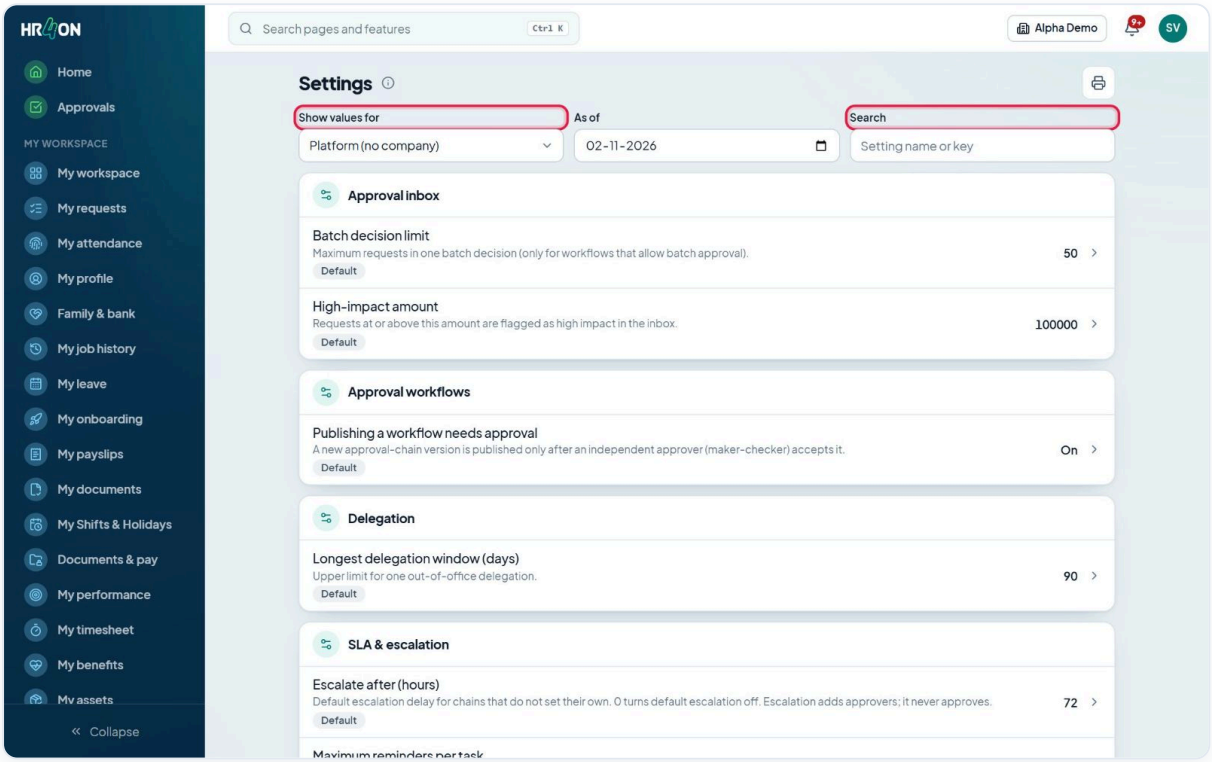
Settings hold the rules that are not part of a workflow or a policy screen: approval defaults, asset rules, home page options and many module settings. Every setting is versioned by date.

11.1 Find a setting

Settings are grouped by module and area. Each shows its description and current value, and whether it is the default.

HOW TO DO IT

1. Select **Settings**.
2. Choose **Show values for**: **Platform (no company)** or a company.
3. Use **Search**, or scroll to the area.
4. Use **As of** to see the values on another date.



11.2 Change a setting from a date

Open a setting to see which value applies, its history, and to set a new value.

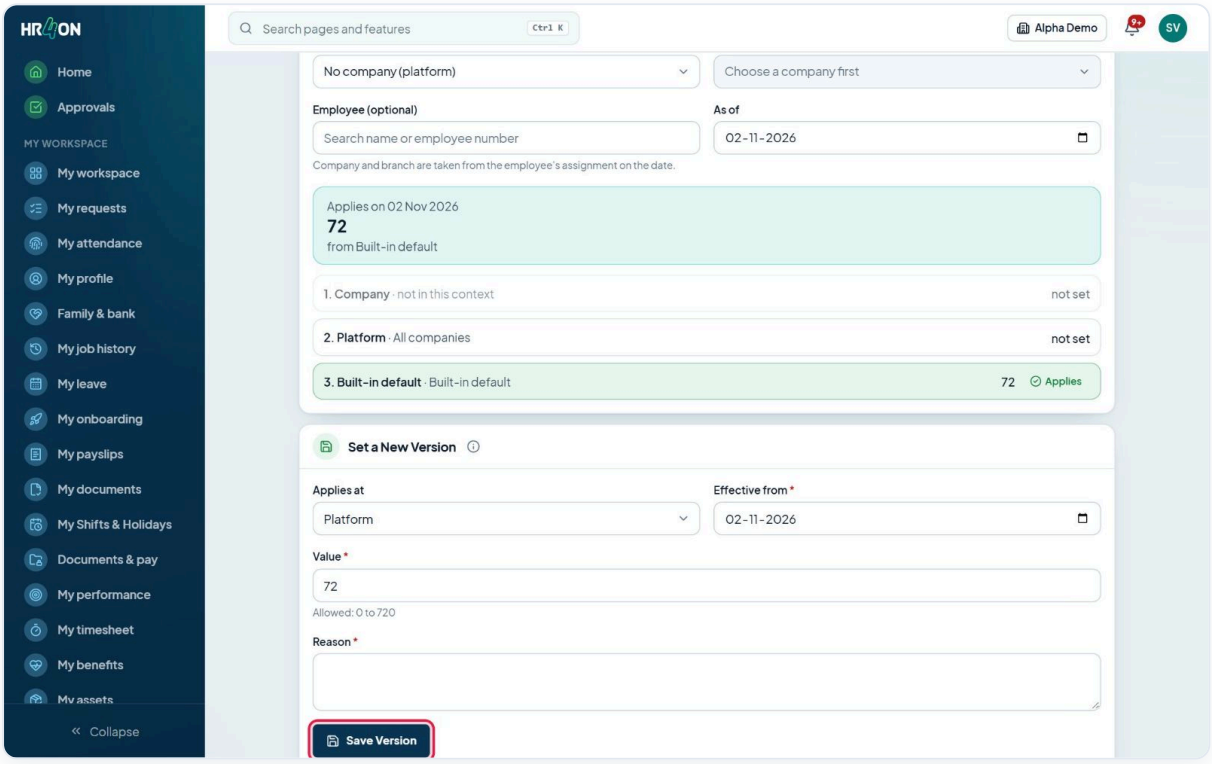
WHAT YOU SEE

- **Which Value Applies**: pick a company, branch or employee and a date to see the value that applies and where it comes from (company, platform or built-in default).
- **History**: every past value with who changed it and why.

HOW TO DO IT

1. Select the setting.
2. Under **Set a New Version** choose where it **Applies at** (the platform, a company or a branch), then enter the **Effective from** date, the **Value** and a **Reason**.
3. Select **Save Version**.

> **GOOD TO KNOW**
> - A company value overrides the platform value for that company. Changes apply from the date you choose and are kept in history.



12 Governance: audit, privacy and security

Governance brings together everything you need to prove HR4ON is run safely: the audit log, privacy requests, retention and legal holds, security alerts, incidents and system health.

12.1 Operations and system health

The Operations page is the health dashboard: background jobs, integration messages, file storage, audit integrity, backups and security alerts.

WHAT YOU SEE

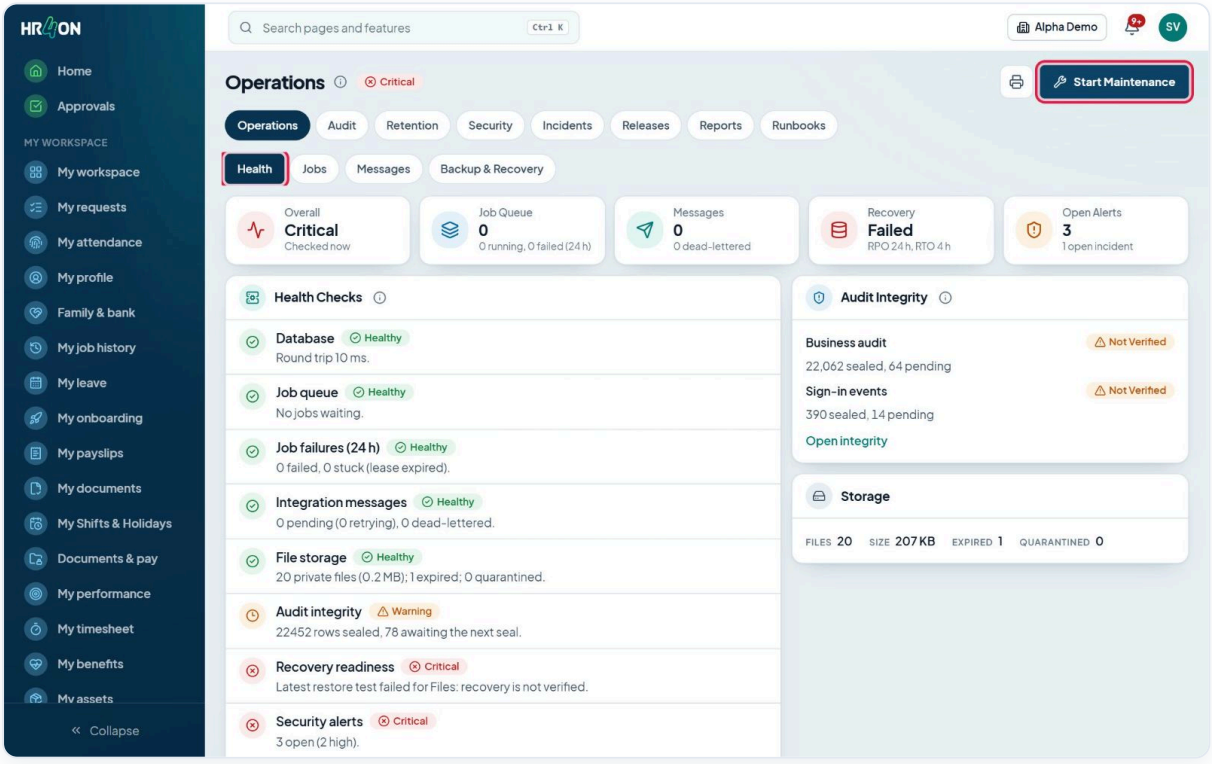
- **Overall** shows the worst status of all checks.
- **Health**, **Jobs**, **Messages** and **Backup & Recovery** tabs give the detail.
- **Scheduled Jobs** lists recurring work such as approval reminders and report delivery.
- **Start Maintenance** puts HR4ON in maintenance mode with a **Message for users**.

HOW TO DO IT

1. Select **Governance**.
2. Read the health checks. Anything **Warning** or **Critical** has a link to the detail.

GOOD TO KNOW

- Only start maintenance mode in an agreed window; users cannot save work while it is on.



12.2 The audit log

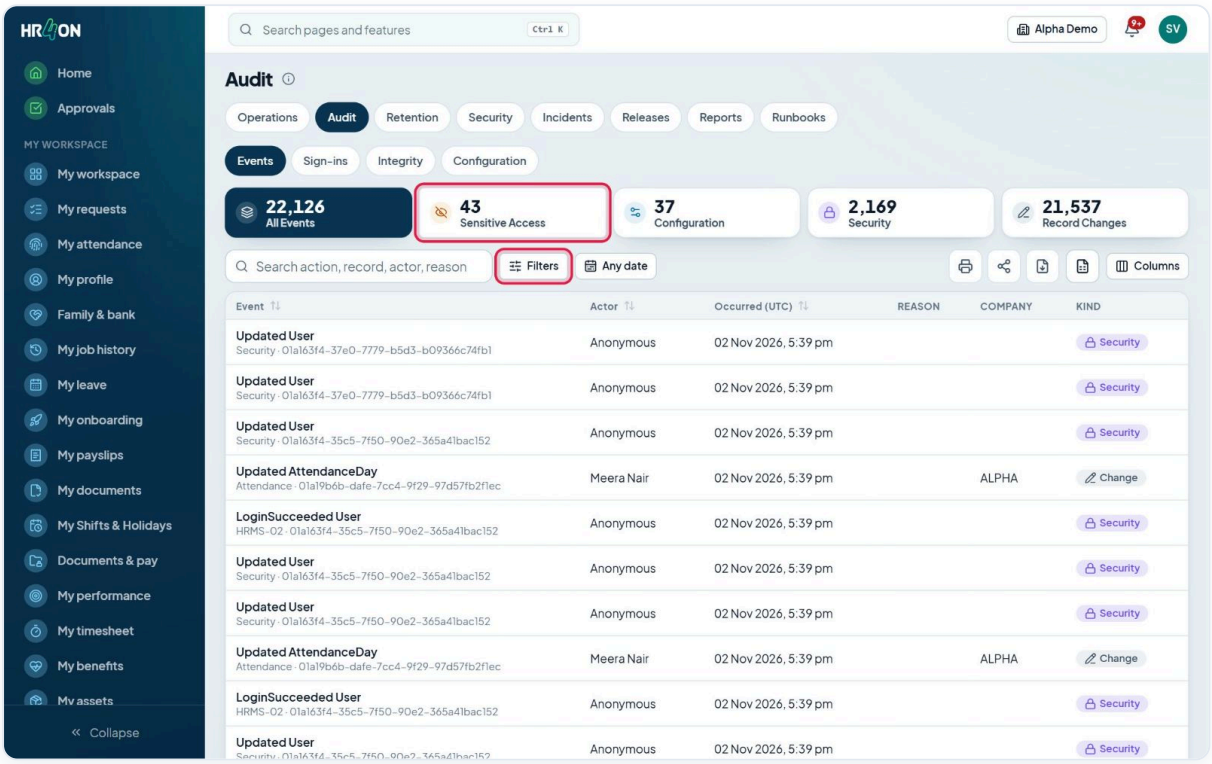
The audit log records every change and every sensitive read in HR4ON: who did it, when, from where and why.

WHAT YOU SEE

- Count tabs: **All Events**, **Sensitive Access** (salary or personal data viewed or downloaded), **Configuration**, **Security** and **Record Changes**.
- Tabs: **Events**, **Sign-ins**, **Integrity** (proof the log has not been altered) and **Configuration** history.

HOW TO DO IT

1. Open **Governance** and select **Audit**.
2. Use **Filters** to narrow by module, actor, record or date.
3. Select an event to see the before and after values.
4. Select **Export** to give the result to an auditor.

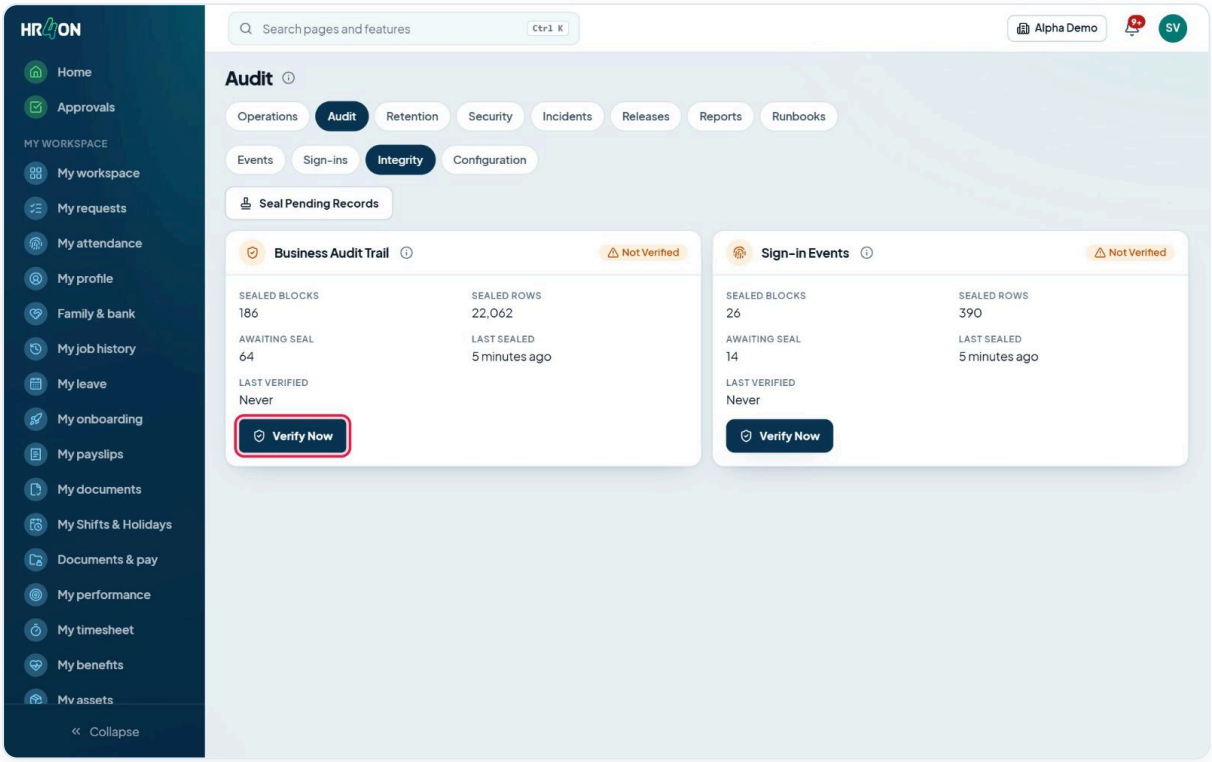


12.3 Audit integrity

Audit records are sealed in blocks so any later change would be detected. Check integrity before an external audit.

HOW TO DO IT

1. On **Audit**, open **Integrity**.
2. Select **Verify Now** to re-check every sealed block.
3. Select **Seal Pending Records** to seal recent records straight away.



12.4 Privacy requests and consents

HR administrator. Employees can ask to see, correct or erase their personal data. Record each request, verify who is asking, and complete it before the due date.

WHAT YOU SEE

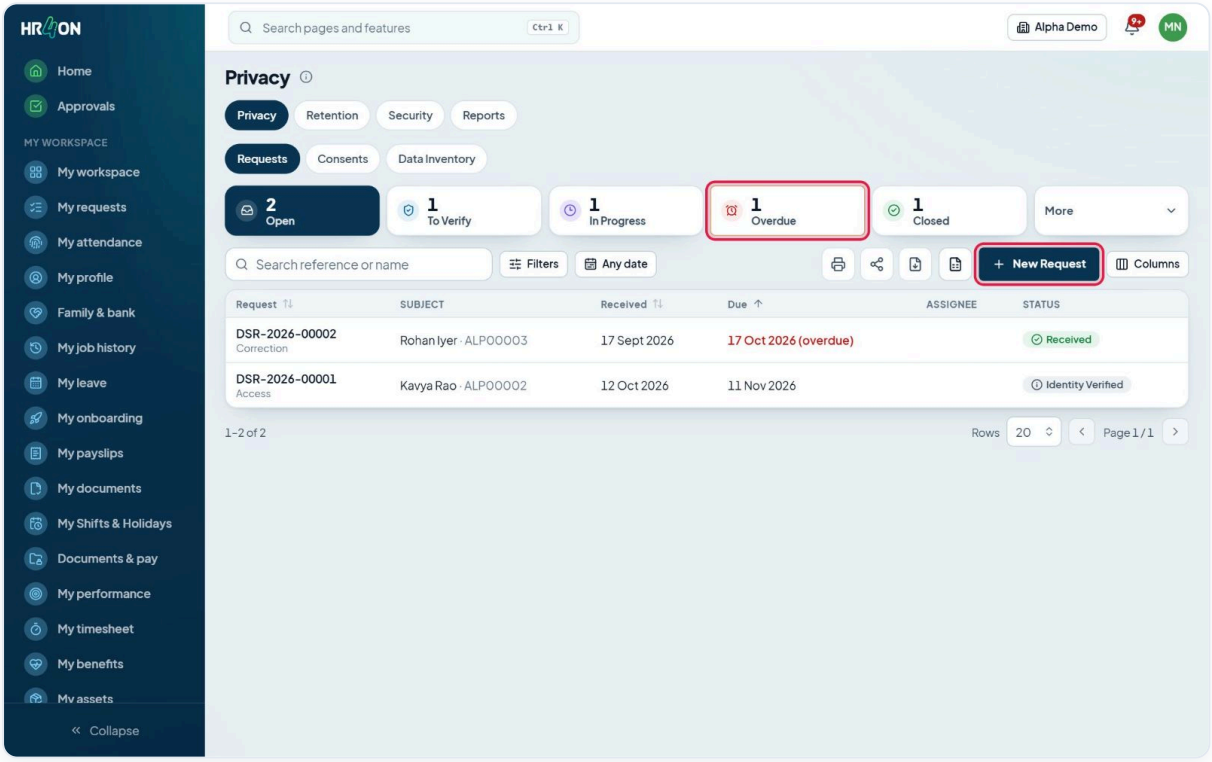
- Count tabs: **Open**, **To Verify**, **In Progress**, **Overdue** and **Closed**.
- **Consents** lists optional consents (for example photos in newsletters) and who has given them.
- **Data Inventory** lists what personal data HR4ON holds and its sensitivity.

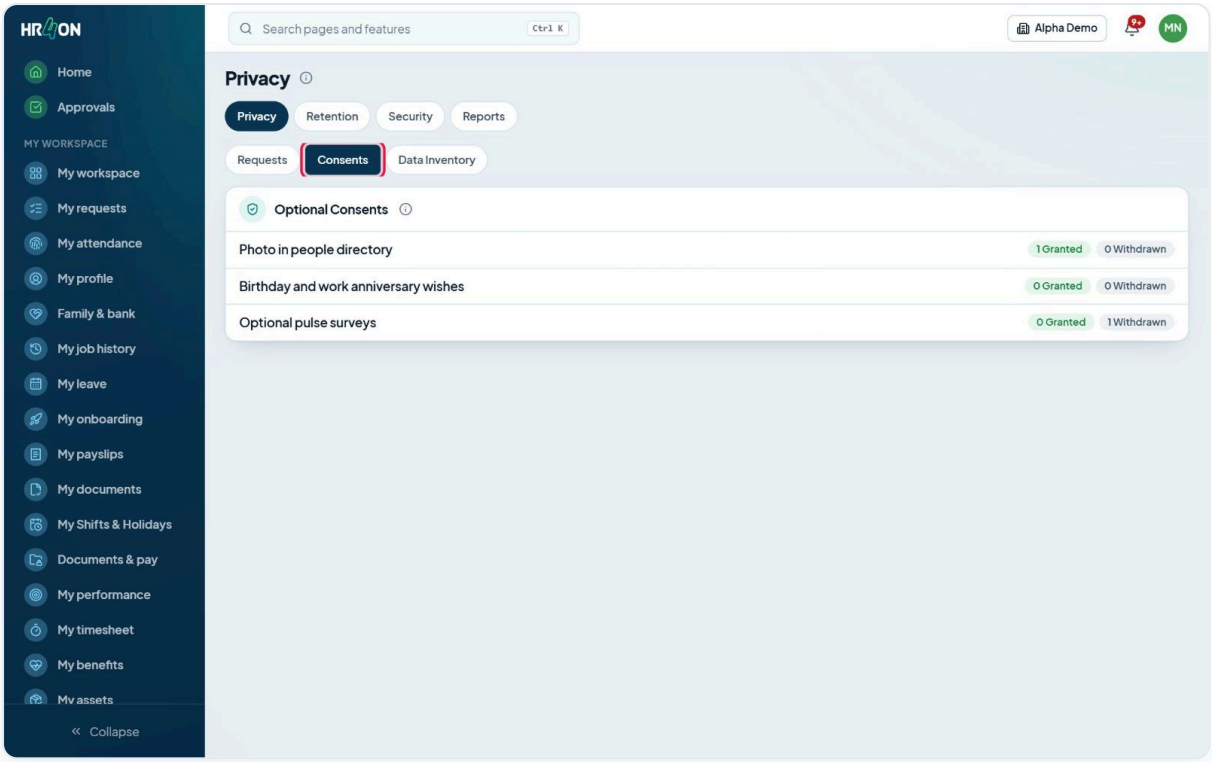
HOW TO DO IT

1. Sign in as an HR administrator, open **Governance** and select **Privacy**.
2. Select **New Request**, find the employee, choose the **Request Type**, **Channel** and **Received On**, and select **Record Request**.
3. Open the request to verify identity, work on it and close it.

GOOD TO KNOW

- Requests have a legal due date. Overdue requests are flagged in red.





The Consents tab.

12.5 Retention and legal holds

Retention policies say how long each kind of record is kept. A retention run previews what is due for deletion and needs approval before anything is removed. A legal hold stops records being removed while a dispute or investigation is open.

WHAT YOU SEE

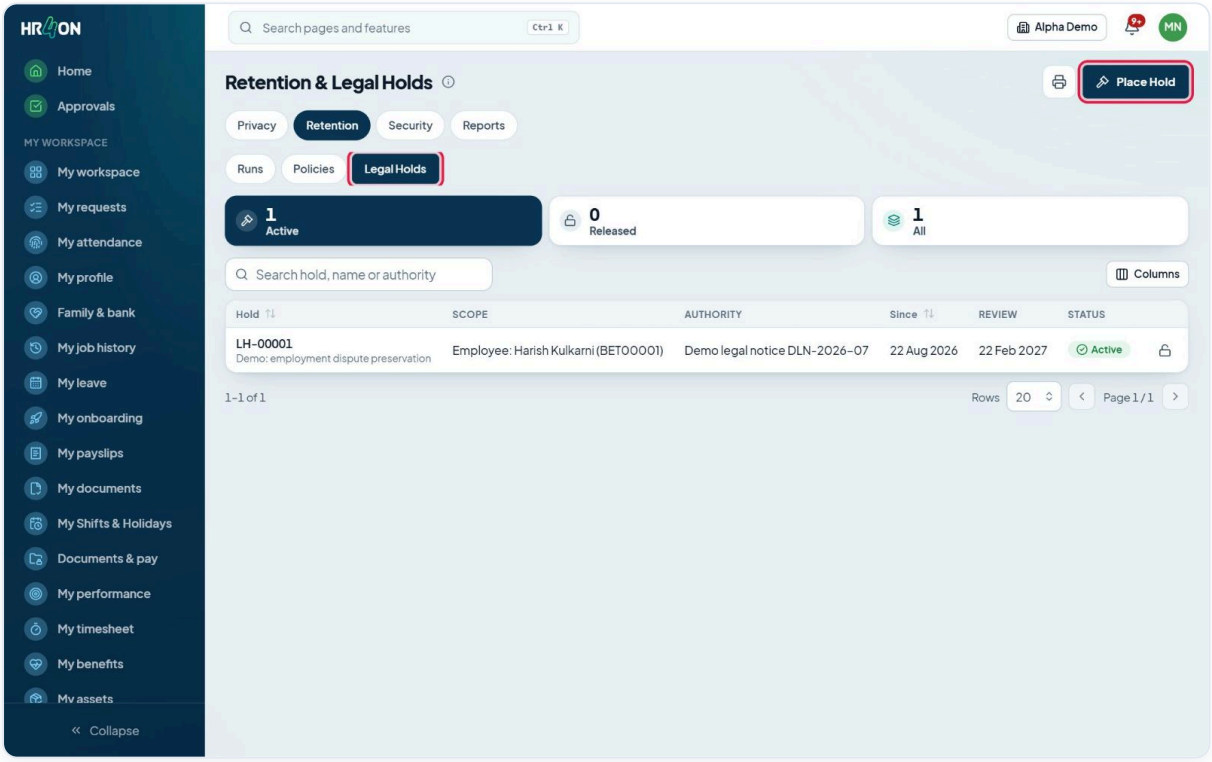
- **Runs**: retention previews and their status (**Previewed**, **In Approval**, **Ready**, **Executed**).
- **Policies**: the retention period, trigger and legal authority for each class of record.
- **Legal Holds**: active and released holds.

HOW TO DO IT

1. Open **Governance** and select **Retention**.
2. To check what is due, select **New Preview**, choose the policy and **As Of** date, and select **Run Preview**.
3. To protect records, open **Legal Holds**, select **Place Hold**, choose the employee or record, give the **Reason** and **Starts On**, and save.

GOOD TO KNOW

- Records under a legal hold are never removed by a retention run.
- Nothing is removed until a retention run is approved and executed.



Legal holds, as the HR administrator sees them. The platform administrator sees the same tabs.

12.6 Security centre

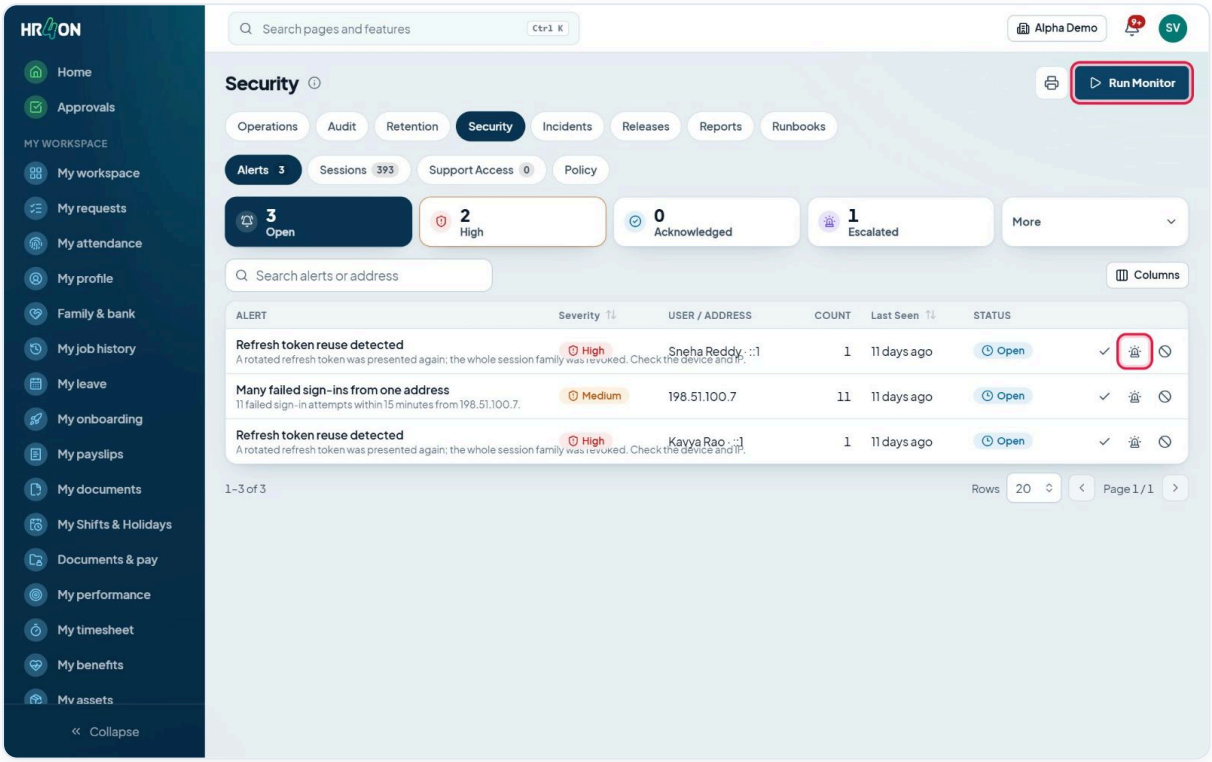
The security centre shows automatic alerts (for example many failed sign-ins from one address), open sessions, support access and the security policy.

WHAT YOU SEE

- **Alerts**: each alert with severity, user or address, count and status. Use **Acknowledge**, **Escalate to incident** or **Dismiss**.
- **Sessions**: everyone signed in now; you can **End Session**.
- **Support Access**: time-limited access for a support engineer, which must be approved.
- **Policy**: password, lock-out and session rules.

HOW TO DO IT

1. Open **Governance** and select **Security**.
2. Review open alerts every day.
3. Select **Run Monitor** to check for new alerts now.



12.7 Incidents

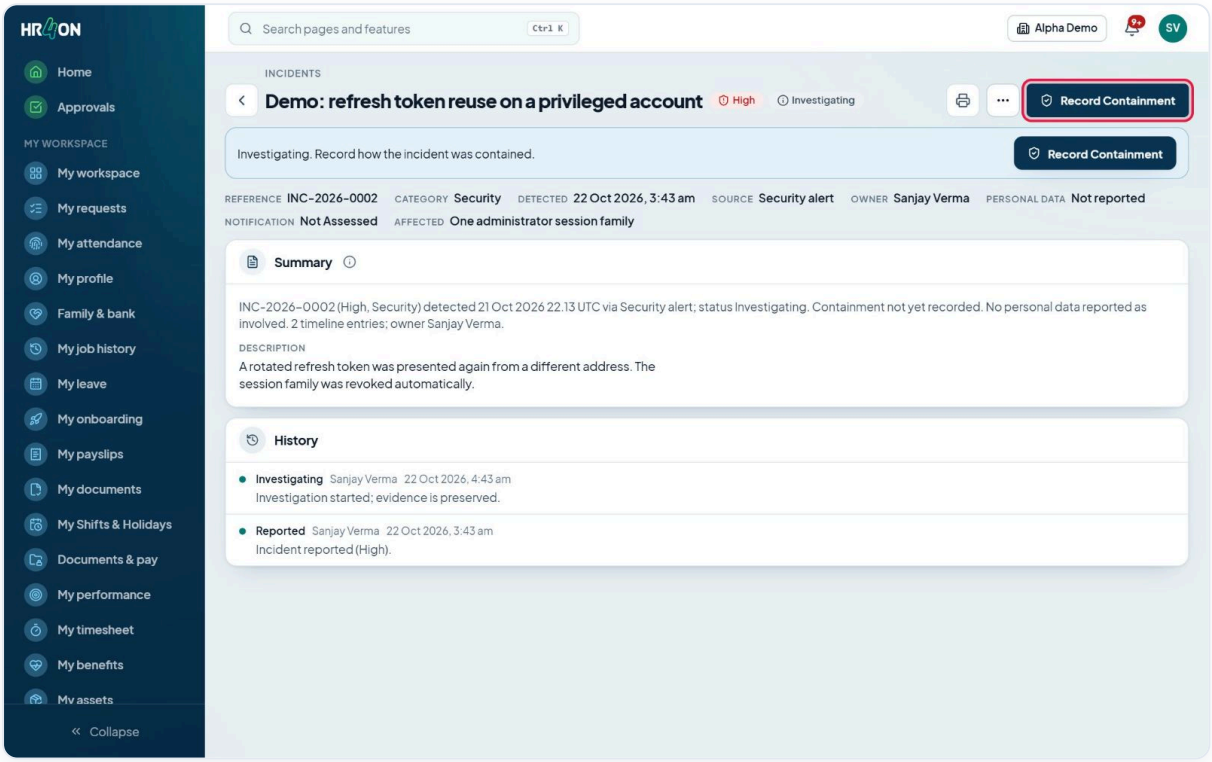
Record security and data incidents, follow them through containment and resolution, and decide whether anyone must be notified.

WHAT YOU SEE

- Status: **Open**, **Investigating**, **Contained**, **Resolved**, **Closed**.
- The incident page holds the summary, owner, whether personal data is involved, notification assessment and a timeline.

HOW TO DO IT

1. Open **Governance** and select **Incidents**.
2. Select **Report Incident**, enter the **Title**, **Category**, **Severity**, **Detected At**, **What Happened** and **Affected Scope**, and tick **Personal data may be involved** if so.
3. Open the incident and use **Record Containment** and the next actions as the work progresses.

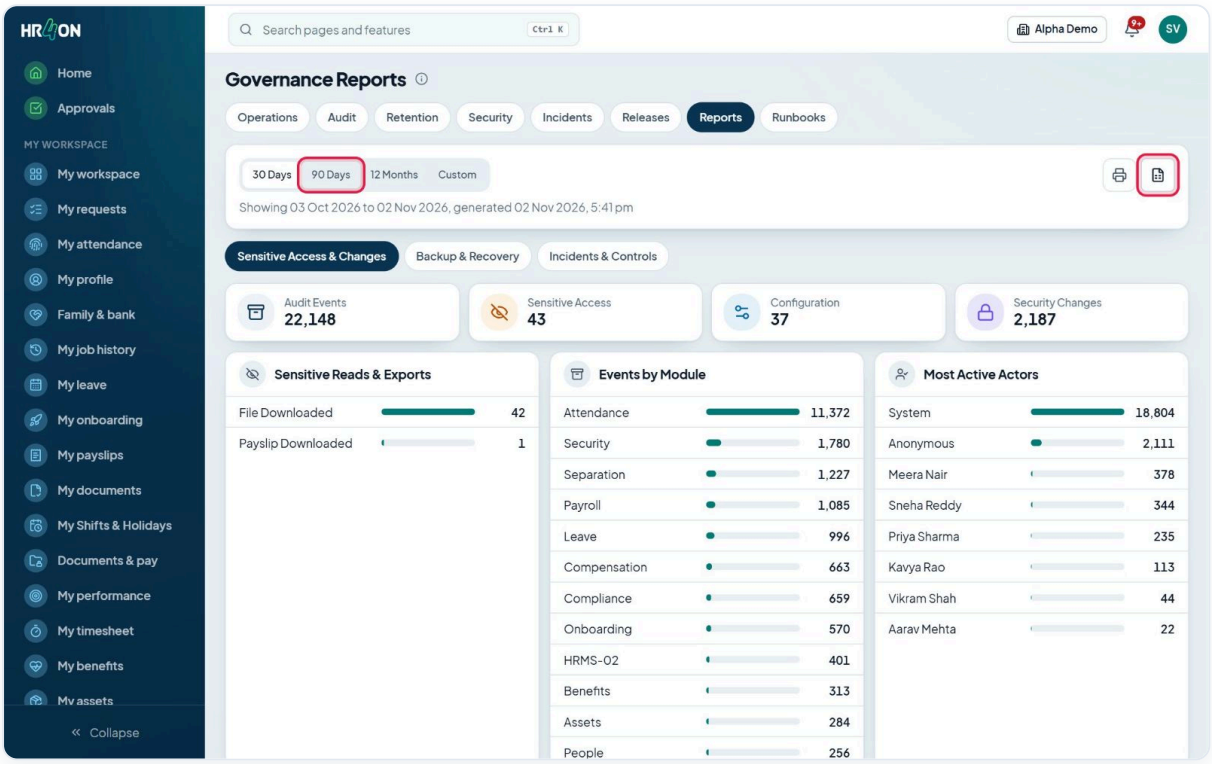


12.8 Governance reports and runbooks

Reports summarise sensitive access, backups and incidents for a period. Runbooks are the step-by-step procedures for operations tasks such as restoring a backup.

HOW TO DO IT

1. Open **Governance** and select **Reports**.
2. Choose **30 Days**, **90 Days**, **12 Months** or **Custom**.
3. Select **Download CSV** or **Print**.
4. Open **Runbooks** for operating procedures.



A Words used in this guide

Access review
A periodic check where reviewers confirm or remove the access people hold.

Audit log
The permanent record of every change and sensitive view in HR4ON.

Built-in default chain
The approval route HR4ON uses for a request type until you publish your own version.

Company
A legal entity that employs people and runs payroll.

Connector
A configured link between HR4ON and another system.

Data scope
Whose records a role can act on: self, own team, an organisation unit, one company or all companies.

Dead letter
An outgoing message that failed after every retry and needs attention.

Effective date
The date a change starts to apply. HR4ON keeps every dated version.

Escalation
Adding another approver when a step is overdue. It never approves on anyone's behalf.

Legal hold
A block that stops records being removed while a dispute or investigation is open.

Maker-checker
A rule that a second, independent person must approve a change before it takes effect.

Master value
An entry in a lookup list such as a grade, designation or cost centre.

MFA
Two-step verification: a 6-digit code from an authenticator app at sign-in.

Organisation unit
A branch, location, payroll establishment, department or team.

Retention policy
How long a class of record is kept before it may be removed.

Role
A bundle of permissions, granted to a user with a scope.

SLA
The time an approval step should take before reminders and escalation start.

Webhook
A signed message HR4ON sends to another system when something happens.