USER GUIDE

HR Guide: Hiring and Onboarding

Run recruitment from requisition to accepted offer, then bring new joiners on board so they are ready on day one.

WHO IT'S FOR

HR administrators and HR operators who recruit and onboard

COVERS

Positions, requisitions and approval, job postings, candidates and pipeline, interviews and scorecards, offers, referrals, hires, onboarding cases, checklists and tasks, document verification, day-one readiness, probation

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

About this guide

This guide follows a hire from the moment a manager asks for a new person to the end of the joiner's first weeks. It is written for the HR team, who run recruitment and onboarding in HR4ON. There is no separate recruiter role: HR administrators and HR operators do this work.

The screenshots show Meera Nair, HR administrator for the Alpha Demo company. HR operators have the same screens for their own company. Some pictures show what managers, interviewers, referring employees and new joiners see, so you can guide them.

Employee records, employment changes and exits are in *HR Guide: People and Employee Lifecycle*.

What you can do in HR4ON

- Check the approved positions and headcount a hire depends on
- Raise a requisition, send it for approval and publish the job
- Add candidates, move them through the pipeline and handle referrals
- Schedule interviews and collect structured scorecard feedback
- Prepare offers, get them approved, issue them and record the answer
- Turn an accepted offer into a preboarding employee and an onboarding case
- Run onboarding checklists, verify documents and checks, and confirm joining on day one
- Follow the probation review that leads to confirmation

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. Candidates, vendors, salaries and companies in the screenshots are demo data.

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01 Getting started

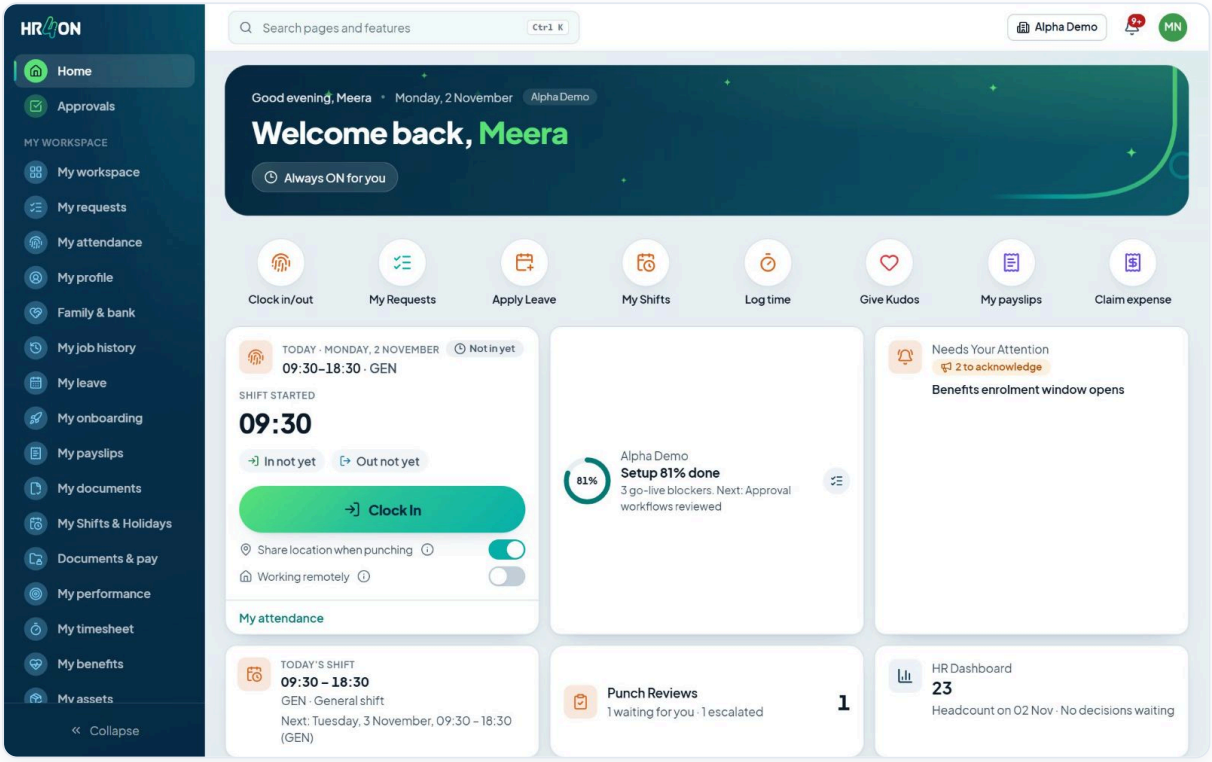
Where hiring lives in HR4ON and how the pieces connect.

1.1 The hiring journey

Hiring in HR4ON has two parts that hand over to each other.

WHAT YOU SEE

- **Recruitment** (menu group **Hire**, item **Recruitment**): requisition, approval, job posting, candidates, interviews, offer.
- **Hires**: an accepted offer appears here and you create the preboarding employee record.
- **Onboarding** (**Onboarding** and **Onboarding Tasks**): the joiner's checklist, document collection, background checks, equipment and accounts, then confirmation of joining and induction.
- **Probation**: after joining, the probation review leads to confirmation (in **Employment changes**).



Home for the HR administrator. Hiring and onboarding cards and the **New Joiner** and **Raise requisition** quick actions link to the work.

02 Positions and headcount

A hire normally fills an approved position. Workforce planning keeps the list of positions and the headcount plan that recruitment draws on.

2.1 Check positions before hiring

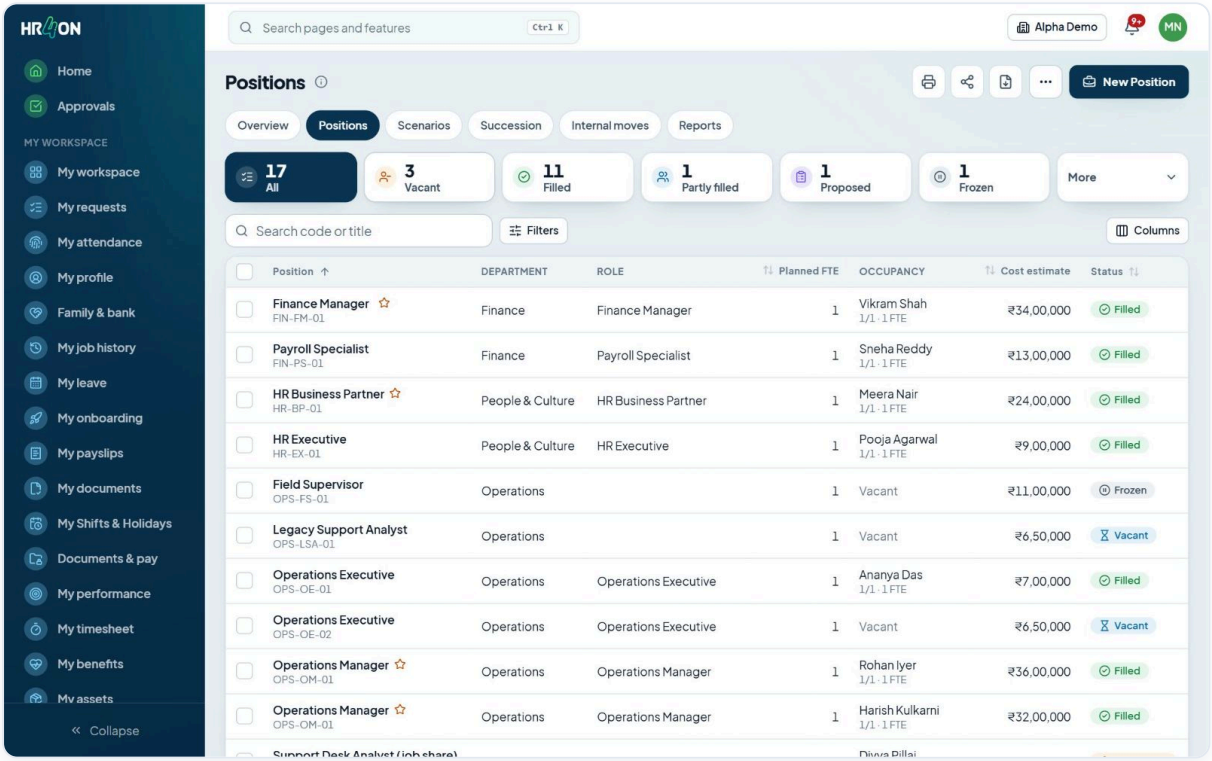
Workforce planning (menu group **Grow**) shows the position structure, vacancies and the approved headcount. Check that a vacancy exists before you raise a requisition.

WHAT YOU SEE

- **Positions** lists each position with its department, grade, incumbent and whether it is vacant.
- A new position or a change to headcount goes through workforce planning approval, not recruitment.

HOW TO DO IT

1. Select **Workforce planning** and open **Positions**.
2. Filter by department to find vacant positions.
3. Use the position details when you raise the requisition.



03 Requisitions

A requisition is the request to hire: which role, how many people, why, and the budget. Managers can raise their own; HR can raise them for anyone.

3.1 Recruitment overview

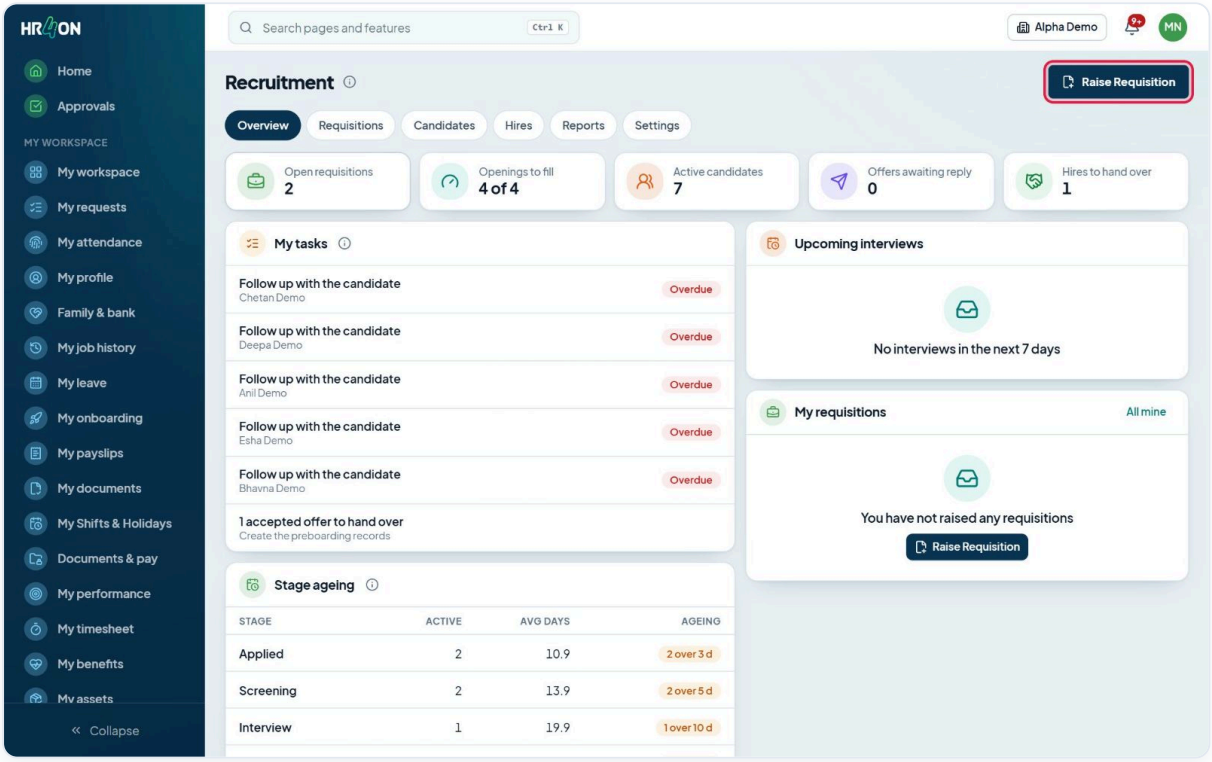
Recruitment opens on an overview of everything in progress and the work waiting for you.

WHAT YOU SEE

- The tiles show open requisitions, openings to fill, active candidates, offers awaiting reply and hires to hand over.
- **My tasks** lists follow-ups and feedback due, with **Overdue** in red.
- **Stage ageing** shows how many candidates sit in each stage and how many have been there too long.
- **Upcoming interviews** and **My requisitions** complete the picture.

HOW TO DO IT

1. Select **Recruitment** in the **Hire** menu.
2. Select a task or tile to open the list behind it.



3.2 The requisitions list

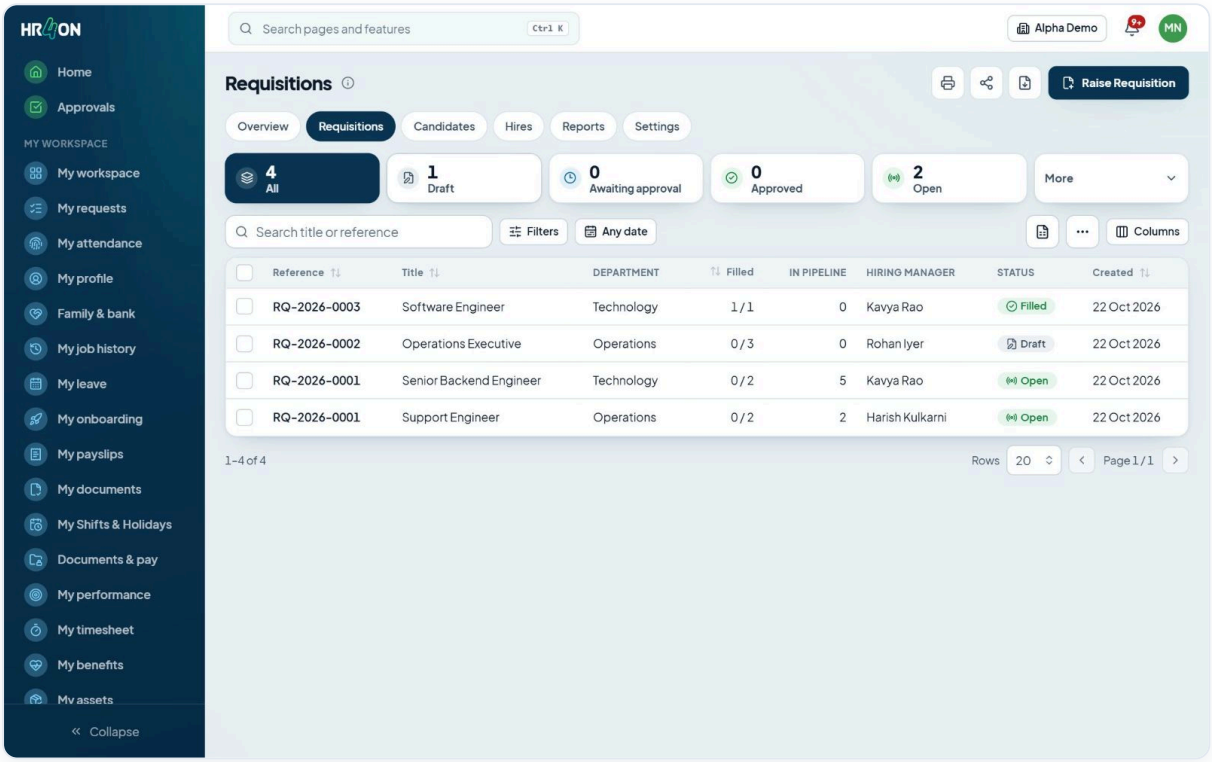
Requisitions lists every requisition with its department, how many openings are filled, how many candidates are in the pipeline, the hiring manager and status.

WHAT YOU SEE

- Status: **Draft**, **Awaiting approval**, **Approved**, **Open** (published and recruiting), and under **More** paused, filled, closed and cancelled.
- **Filled** shows hires against openings, for example 0 / 2.

HOW TO DO IT

1. Open **Requisitions**.
2. Use the count tabs or **Filters**.
3. Select a row to open it.



3.3 Raise a requisition

Fill in the role, the number of openings and the reason, the budget and salary range, and the job description.

WHAT YOU SEE

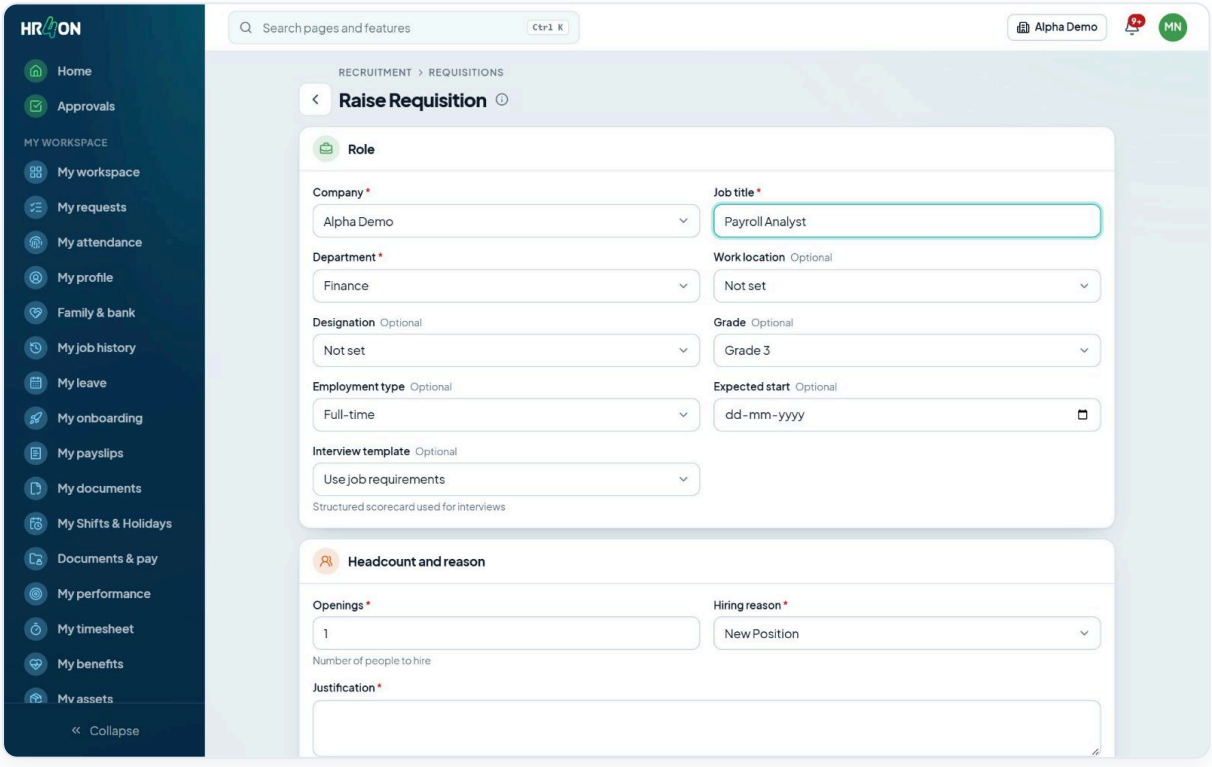
- **Role**: company, job title, department, work location, designation, grade, employment type, expected start and the interview template.
- **Headcount and reason**: openings, hiring reason (**New Position**, **Replacement**, **Expansion**, **Backfill**, **Unplanned**) and justification.
- **Hiring manager** (empty means you) and **Recruiter**.
- **Budget and salary range**: the annual budget for all openings, and whether the salary range is hidden, shown to employees only or shown everywhere.
- The job section holds the description and the requirements that interview scorecards use.

HOW TO DO IT

1. Select **Raise Requisition**.
2. Fill each section. Required fields have a star.
3. Save it as a draft, or submit it for approval.

GOOD TO KNOW

- A requisition cannot be published until it is approved.
- Changing the openings or budget after approval sends it for approval again.



3.4 Send a requisition for approval

A draft requisition shows what is missing and a **Submit For Approval** button. Approvers see it in their Approvals inbox.

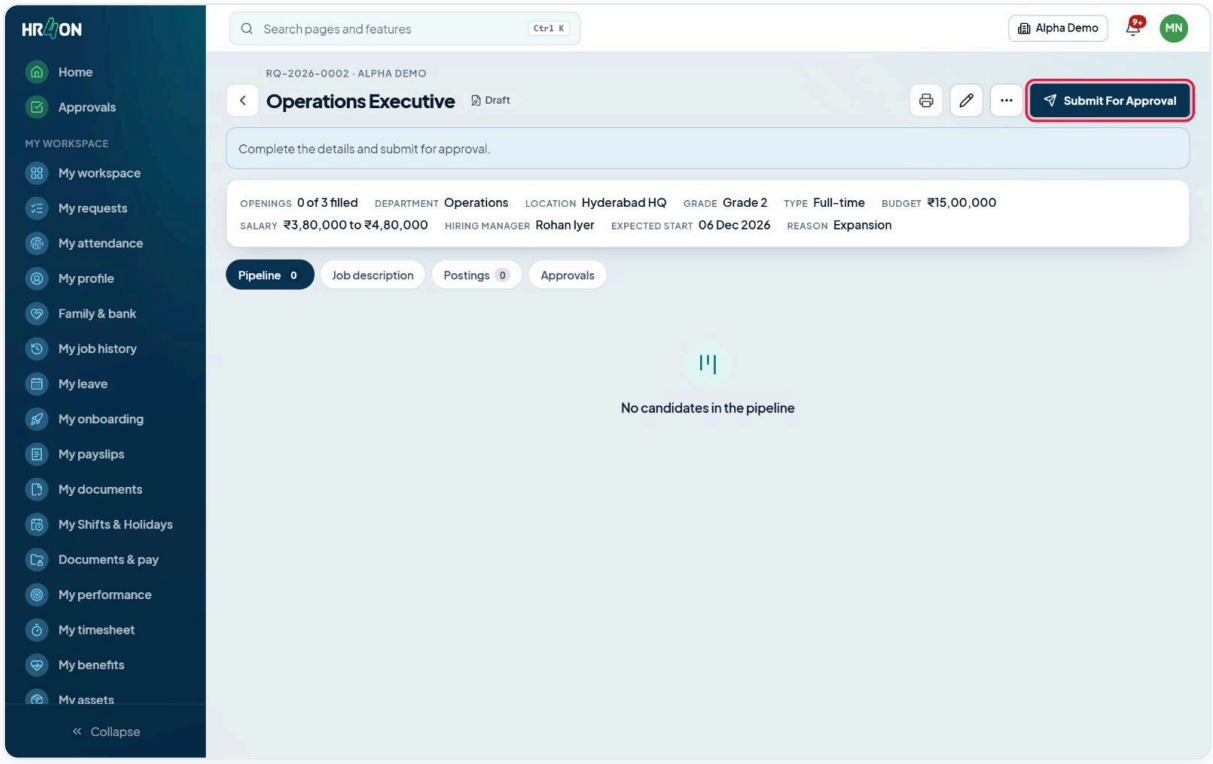
WHAT YOU SEE

- The header shows openings, department, location, grade, type, budget, salary range, hiring manager, expected start and reason.
- The **Approvals** tab shows the approval history and the current step.

HOW TO DO IT

1. Open the draft requisition.
2. Check the details and select **Submit For Approval**.
3. Follow progress in the **Approvals** tab.

> **GOOD TO KNOW**
> - You cannot approve your own requisition.



3.5 Publish the job

Once approved, publish the requisition to one or more channels: internal jobs for employees, the careers site and job boards.

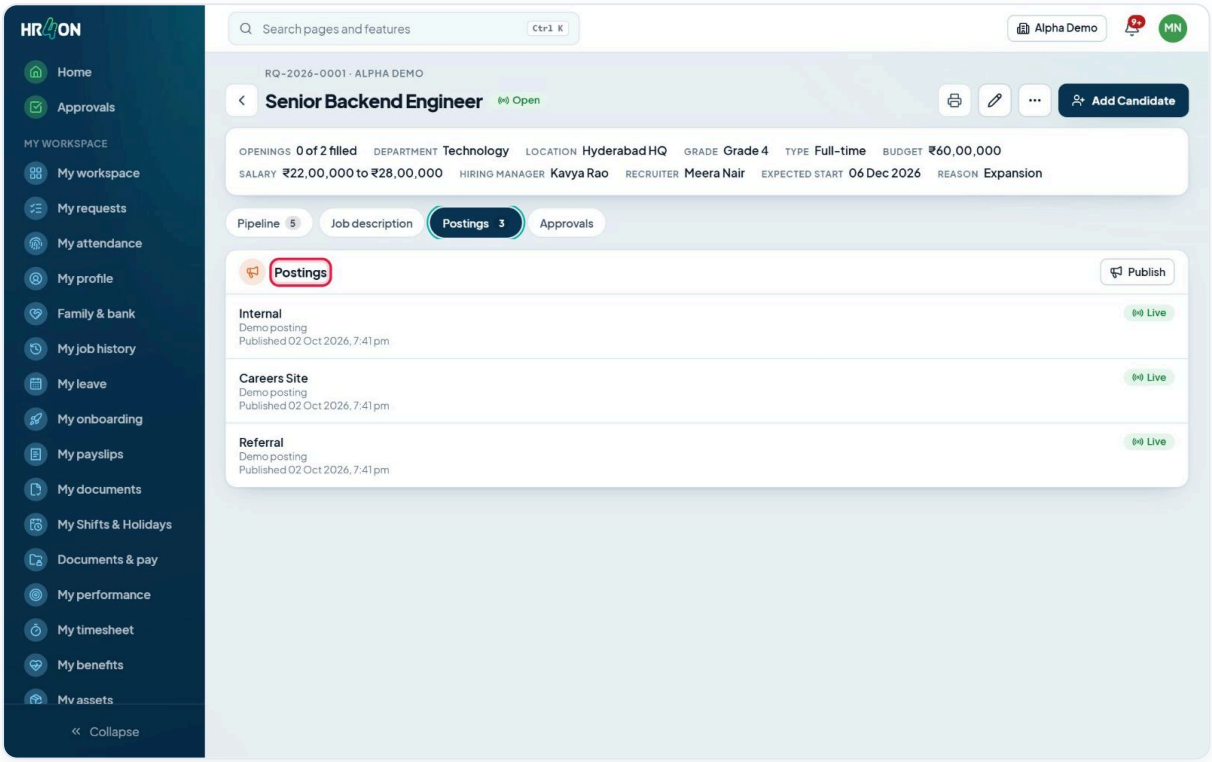
WHAT YOU SEE

- The **Postings** tab lists each channel with its status and closing date.
- **More actions** holds **Publish to more channels**, **Pause**, **Resume**, **Close** and **Cancel requisition**.

HOW TO DO IT

1. Open the approved requisition and select **Publish**.
2. Tick the channels and set **Closes on** if needed.
3. Select **Publish**.

> **TIP**
> - Internal postings appear to employees under **Jobs & referrals**, where they can apply or refer a friend.



04 Candidates and the pipeline

Every application moves through the same pipeline stages until the candidate is hired, rejected or withdraws.

4.1 The pipeline board

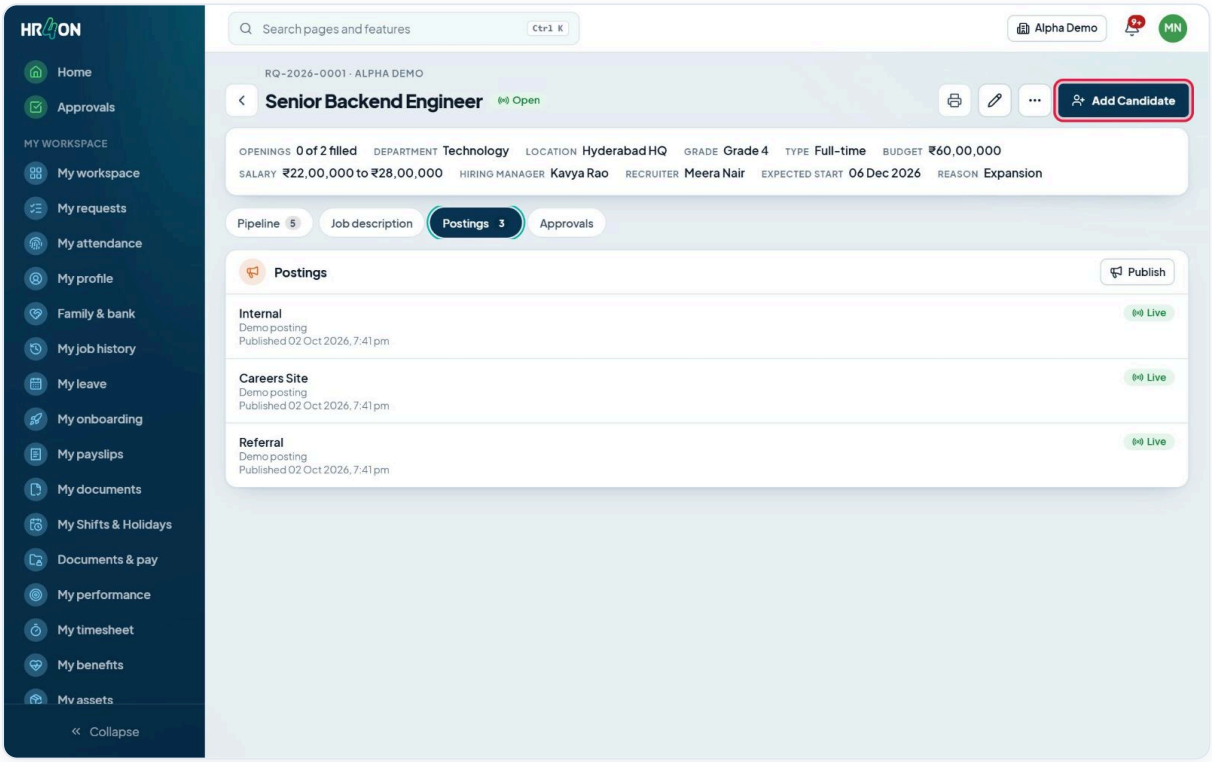
The **Pipeline** tab of a requisition shows candidates as cards in stage columns: Applied, Screening, Interview, Final review, Offer and Hired.

WHAT YOU SEE

- Each card shows days in stage, current role, source (careers site, job board, referral, agency) and the next action.
- A red days count means the candidate has waited longer than the stage allows.
- **Open List** switches to the candidate list for this requisition.

HOW TO DO IT

1. Open the requisition.
2. Read the board, then select a card to open the application.



4.2 The candidates list

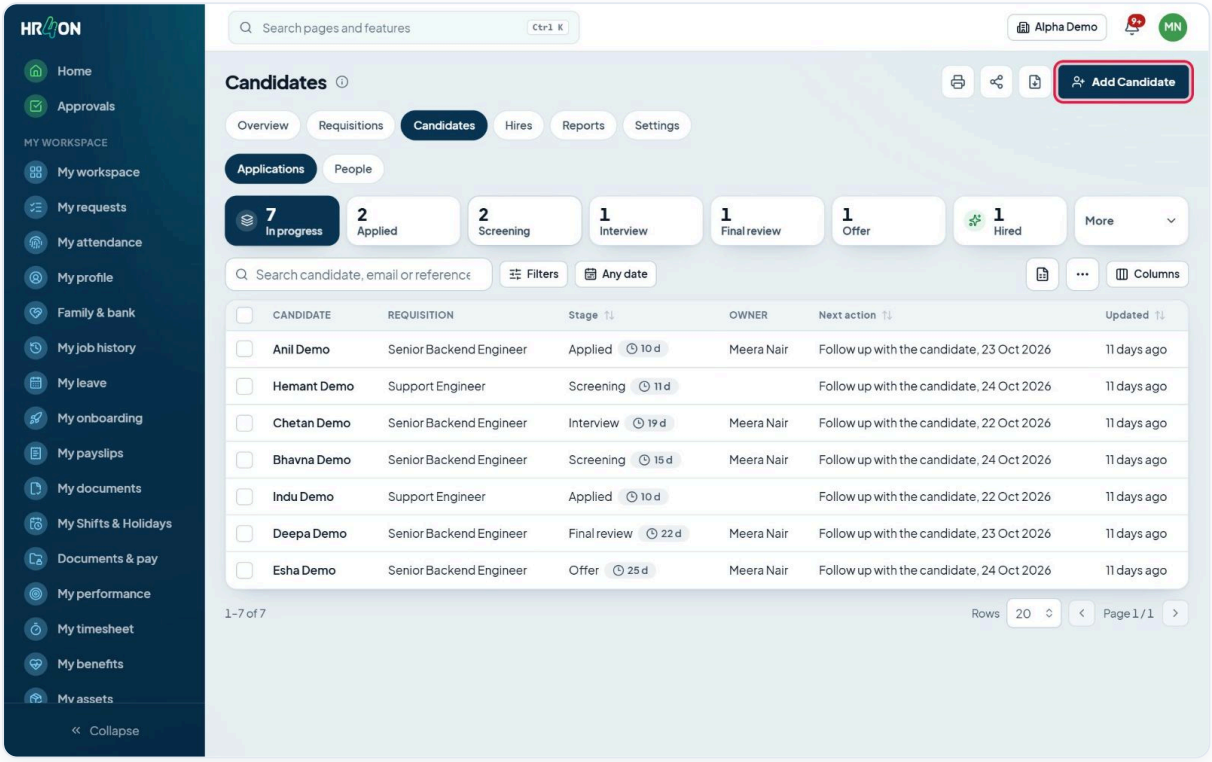
Candidates lists every application in your scope. One person applying for two jobs counts twice, because each application is decided separately.

WHAT YOU SEE

- Count tabs per stage: **In progress**, **Applied**, **Screening**, **Interview**, **Final review**, **Offer**, **Hired**; **More** holds rejected, withdrawn and offer declined.
- **Applications** and **People** switch between applications and the people behind them.
- **Owner** is the HR person following the candidate; **Next action** is the planned follow-up and date.

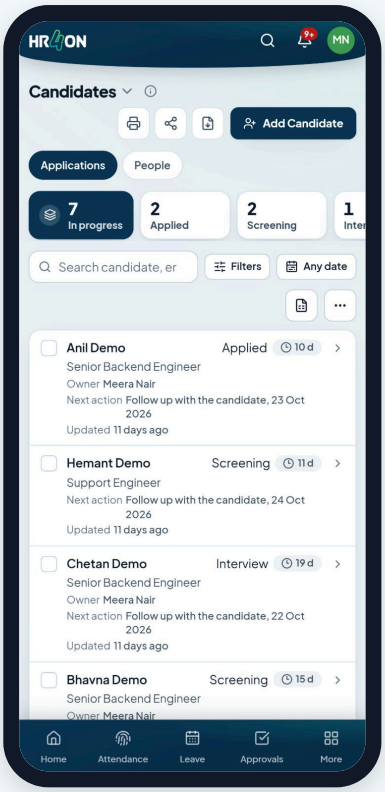
HOW TO DO IT

1. Select **Candidates** in the **Hire** menu.
2. Choose a stage tab or use **Filters**.
3. Select a row to open the application.



ON YOUR PHONE

The same screen on a phone. Menus collapse into the bottom bar and the ··· button.



4.3 Add a candidate

Add a candidate who applied by e-mail, came through an agency or was sourced by you.

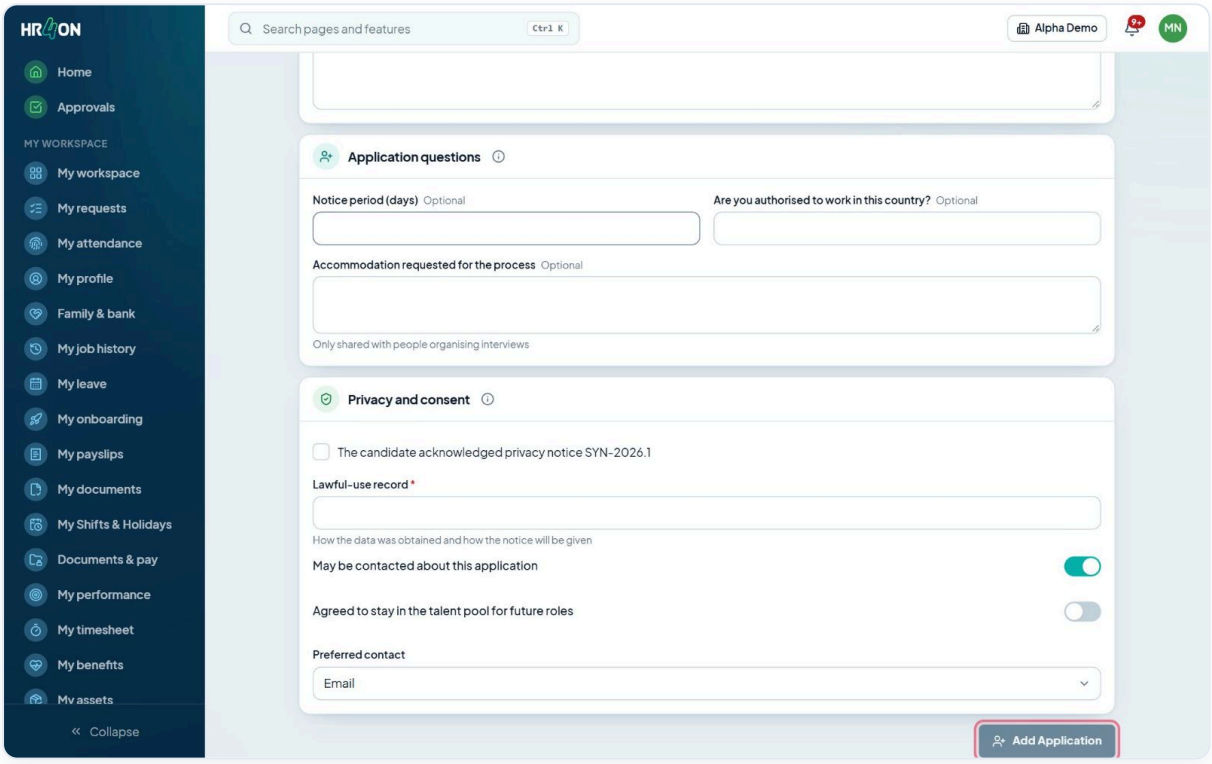
WHAT YOU SEE

- **Job**: the requisition and the source.
- **Candidate**: name, contact details, current employer and title, experience and CV.
- **Application questions** and **Privacy and consent**: the candidate privacy notice and consent.

HOW TO DO IT

1. Select **Add Candidate**.
2. Choose the requisition and source.
3. Fill the candidate details and confirm consent.
4. Select **Add Application**.

> **GOOD TO KNOW**
> - HR4ON warns you if the same person already exists, so you can link the application to them.
> - Protected characteristics are never asked.



4.4 The application page

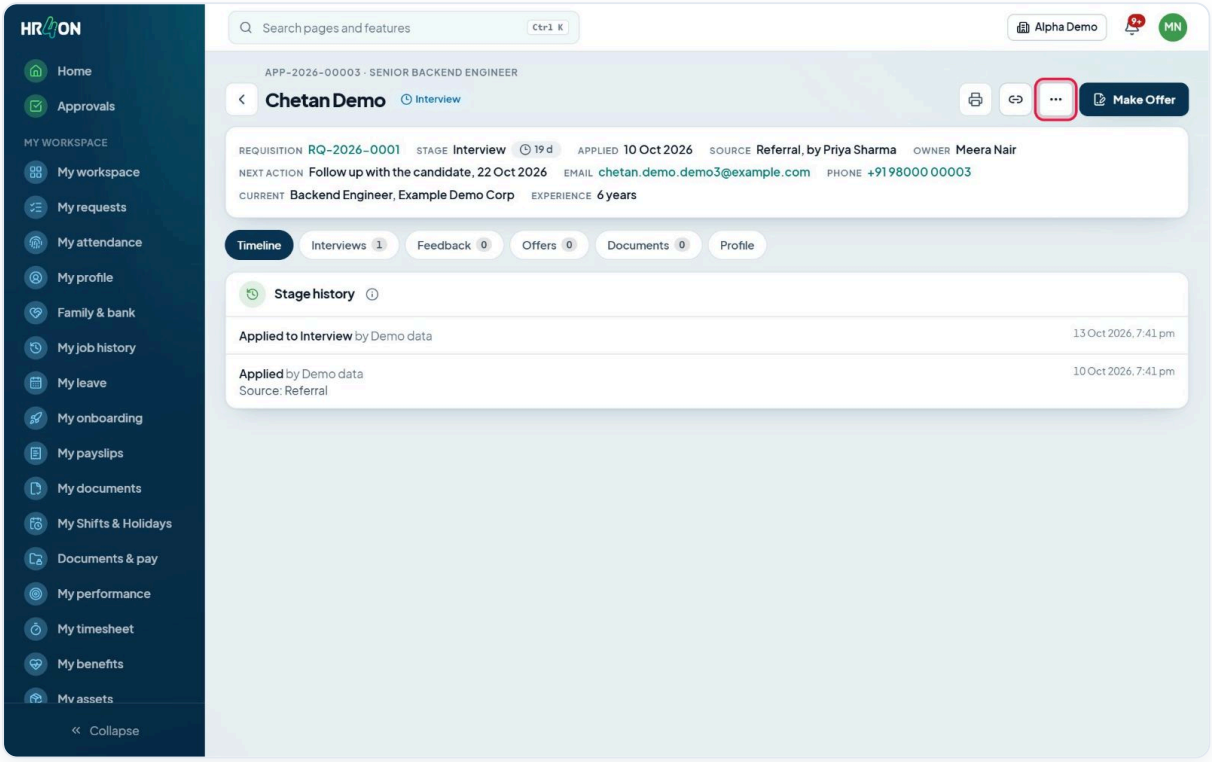
Everything about one application is on one page.

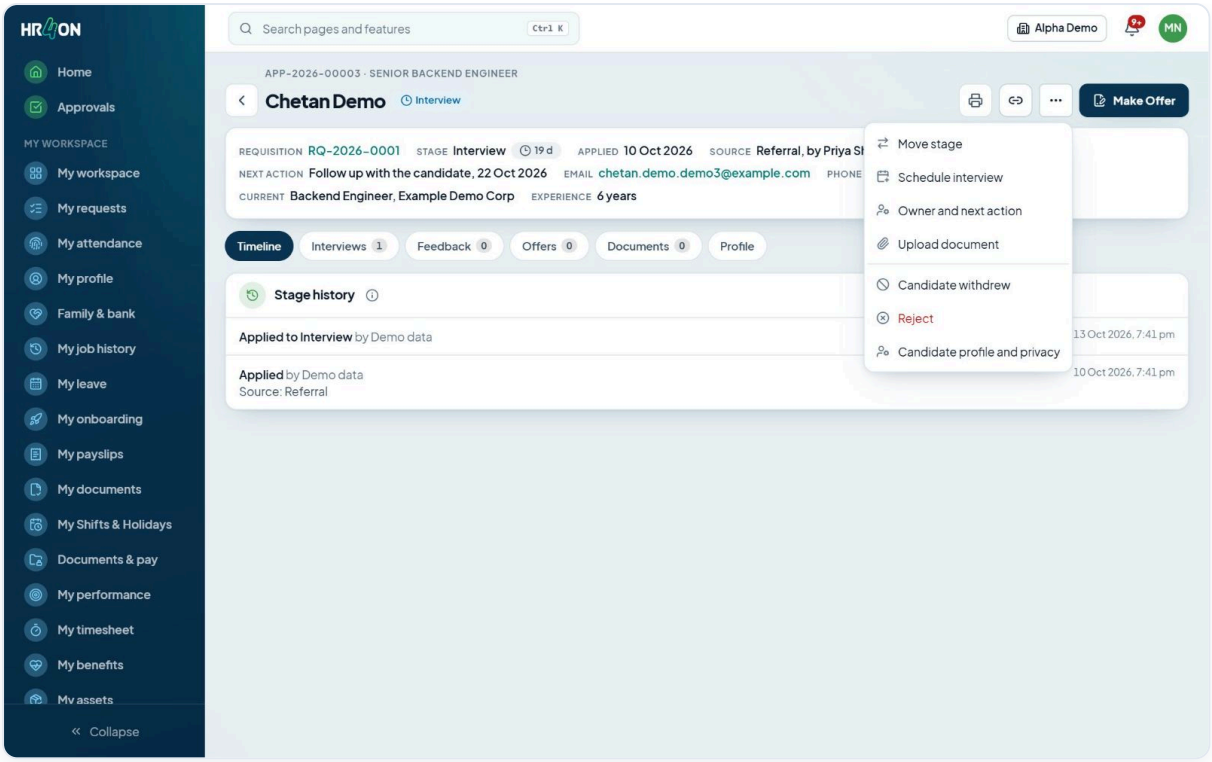
WHAT YOU SEE

- The header shows requisition, stage and days in stage, applied date, source, owner, next action and contact details.
- Tabs: **Timeline** (stage history), **Interviews**, **Feedback**, **Offers**, **Documents** and **Profile**.
- The main button suggests the next step: **Move Stage**, **Schedule Interview**, **Make Offer** or **Open Offer**.
- **More actions** holds **Owner and next action**, **Upload document**, **Reopen**, **Candidate withdrew**, **Reject** and **Candidate profile and privacy**.

HOW TO DO IT

1. Open the application.
2. Use the main button or **More actions** for the next step.




HR4ON
Search pages and features
Ctrl K
Alpha Demo
MN
Home
Approvals
MY WORKSPACE
My workspace
My requests
My attendance
My profile
Family & bank
My job history
My leave
My onboarding
My payslips
My documents
My Shifts & Holidays
Documents & pay
My performance
My timesheet
My benefits
My assets
Collapse
APP-2026-00003 · SENIOR BACKEND ENGINEER
Chetan Demo
Interview
Make Offer
REQUISITION RQ-2026-0001
STAGE Interview 19 d
APPLIED 10 Oct 2026
SOURCE Referral, by Priya Sh
NEXT ACTION Follow up with the candidate, 22 Oct 2026
EMAIL chetan.demo.demo3@example.com
PHONE
CURRENT Backend Engineer, Example Demo Corp
EXPERIENCE 6 years
Move stage
Schedule interview
Owner and next action
Upload document
Candidate withdrew
Reject
Candidate profile and privacy
Timeline
Interviews 1
Feedback 0
Offers 0
Documents 0
Profile
Stage history
Applied to Interview by Demo data
13 Oct 2026, 7:41 pm
Applied by Demo data
Source: Referral
10 Oct 2026, 7:41 pm

4.5 Move a candidate to another stage

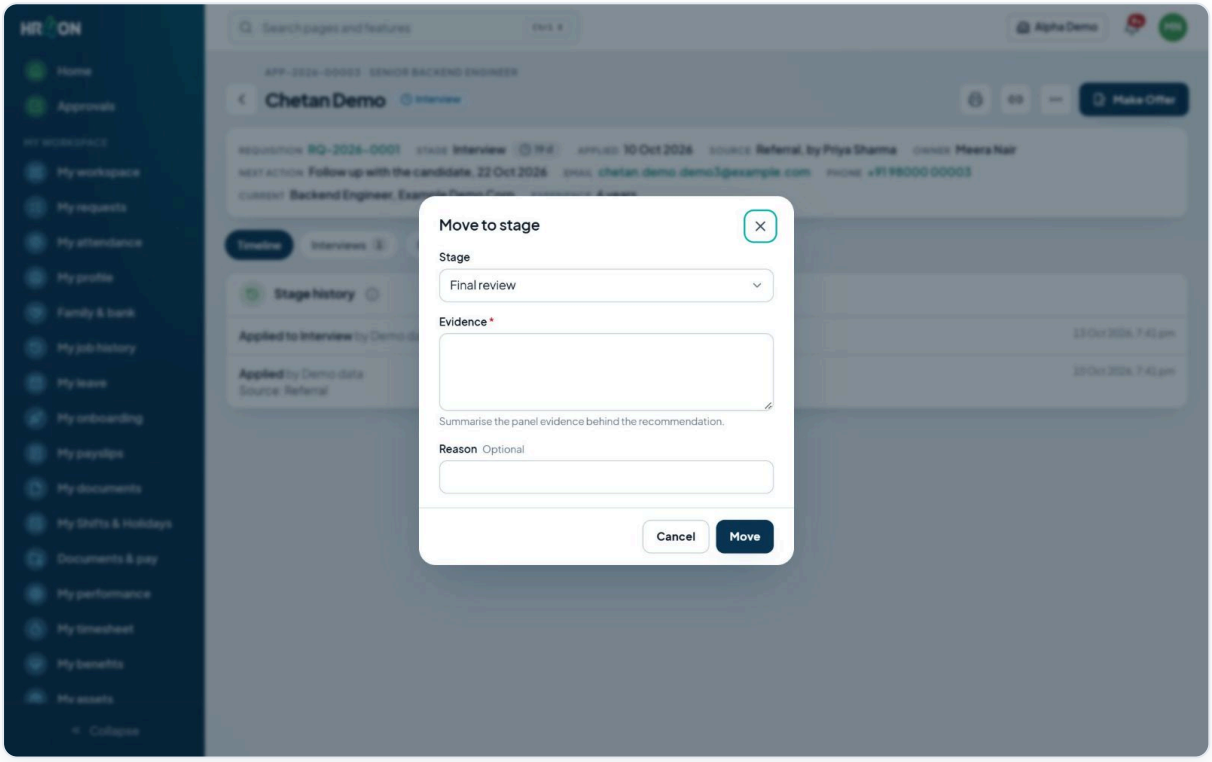
Move the application forward as the candidate progresses, or back if needed.

HOW TO DO IT

1. Open the application and select **Move stage** (in **More actions** if it is not the main button).
2. Choose the **Stage**.
3. Add **Evidence** where the stage requires it, and a **Reason** when moving back.
4. Select **Move**.

GOOD TO KNOW

- Some stages require evidence, for example screening notes.
- Moving back always needs a reason. Every move is kept in the stage history.
- The candidate sees a friendly status in their candidate portal, such as "Under review".



4.6 Reject a candidate or record a withdrawal

Close an application when the candidate is not suitable or no longer interested.

HOW TO DO IT

1. Open the application and select **More actions**.
2. Select **Reject** or **Candidate withdrew**.
3. Choose the reason and confirm.

GOOD TO KNOW

- A rejection on one application never affects the person's other applications.
- **Reopen** brings a closed application back if you need to.

4.7 Referrals from employees

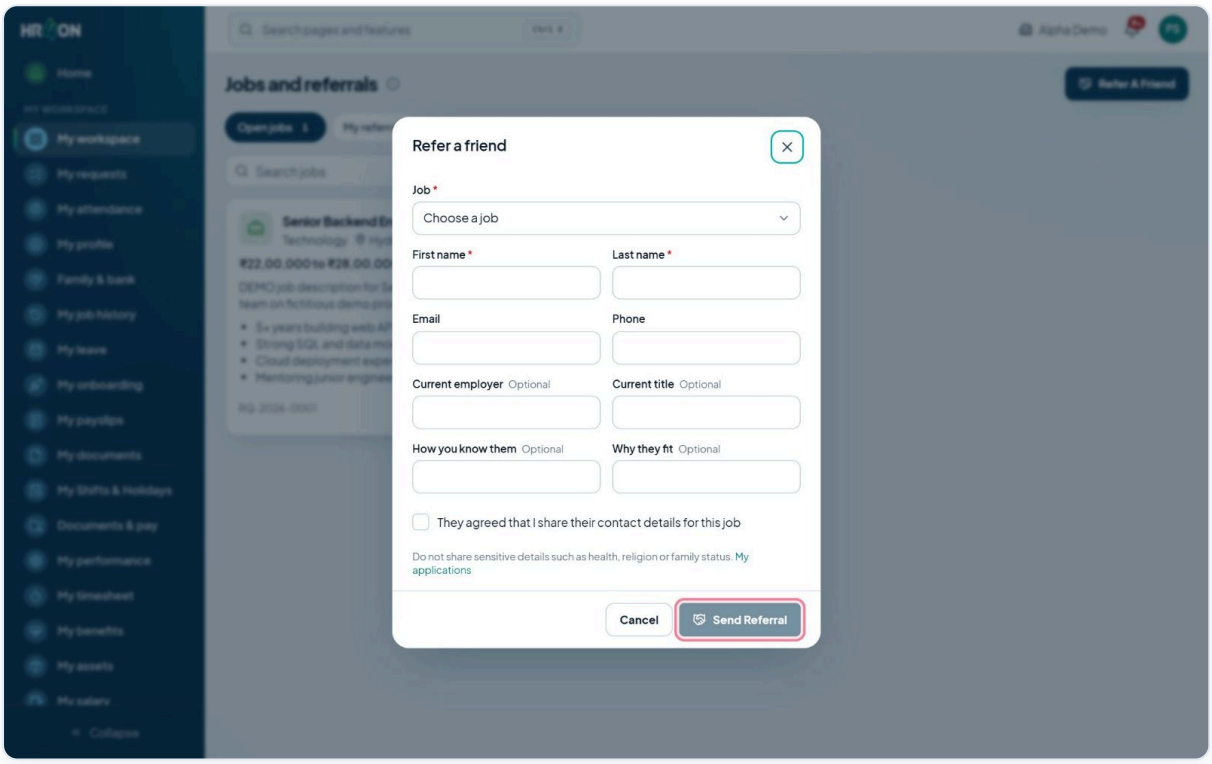
Employees see open internal jobs under **Jobs & referrals** and can refer a friend. Referred candidates arrive with the source **Referral** and the referrer's name.

WHAT YOU SEE

- The referral form asks for the job, the friend's name and contact details, how they know them and why they fit.
- The employee confirms the friend agreed to share their details.
- The referrer follows progress under **My referrals**.

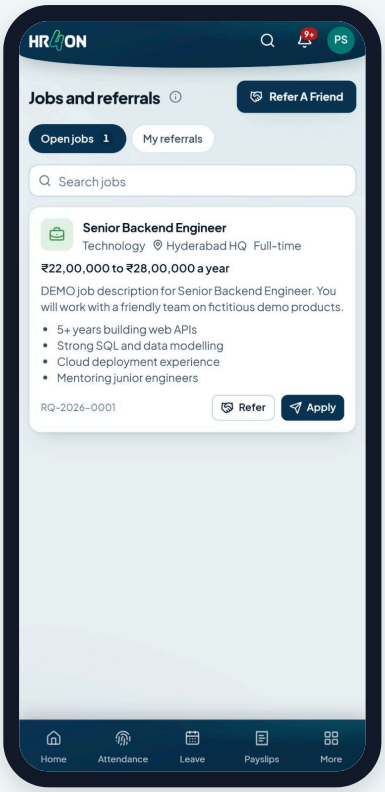
GOOD TO KNOW

- If the same candidate came from two sources, **Resolve source ownership** decides who gets the credit.



ON YOUR PHONE

Open jobs on an employee's phone, with **Refer** and **Apply**.



05 Interviews and feedback

Schedule interviews with a panel, then collect structured scorecards from each interviewer.

5.1 Schedule an interview

Set the round, scorecard, date, time, duration, channel and panel. Interviewers are notified in HR4ON.

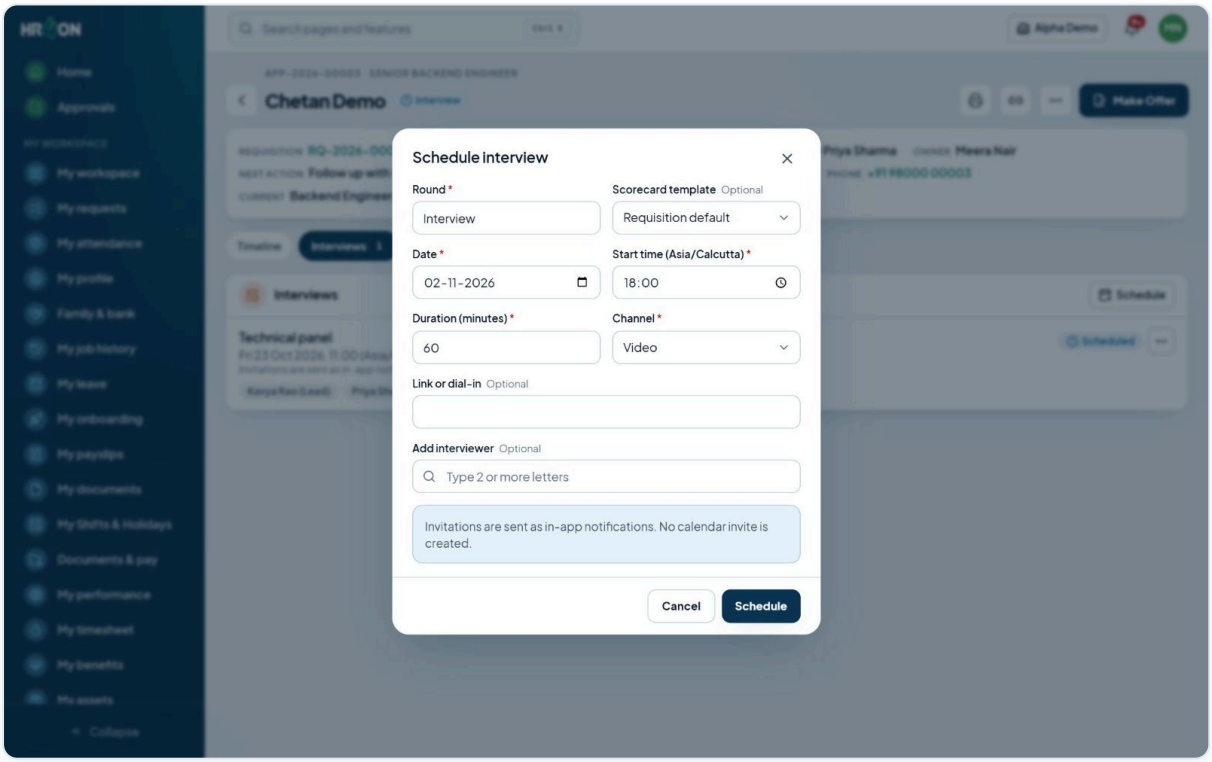
WHAT YOU SEE

- **Round**: for example Technical panel.
- **Scorecard template**: the criteria interviewers rate. **Requisition default** uses the requisition requirements.
- **Date**, **Start time** and **Duration (minutes)**.
- **Channel**: video, phone or in person, with the **Link or dial-in** or the place.
- **Add interviewer** builds the panel; mark one as lead.

HOW TO DO IT

1. Open the application and select **Schedule Interview**, or **Schedule** on the **Interviews** tab.
2. Fill the round, date, time, duration and channel.
3. Add the interviewers.
4. Select **Schedule**.

> **GOOD TO KNOW**
> - Invitations are sent as in-app notifications. There is no calendar integration unless your administrator sets one up.

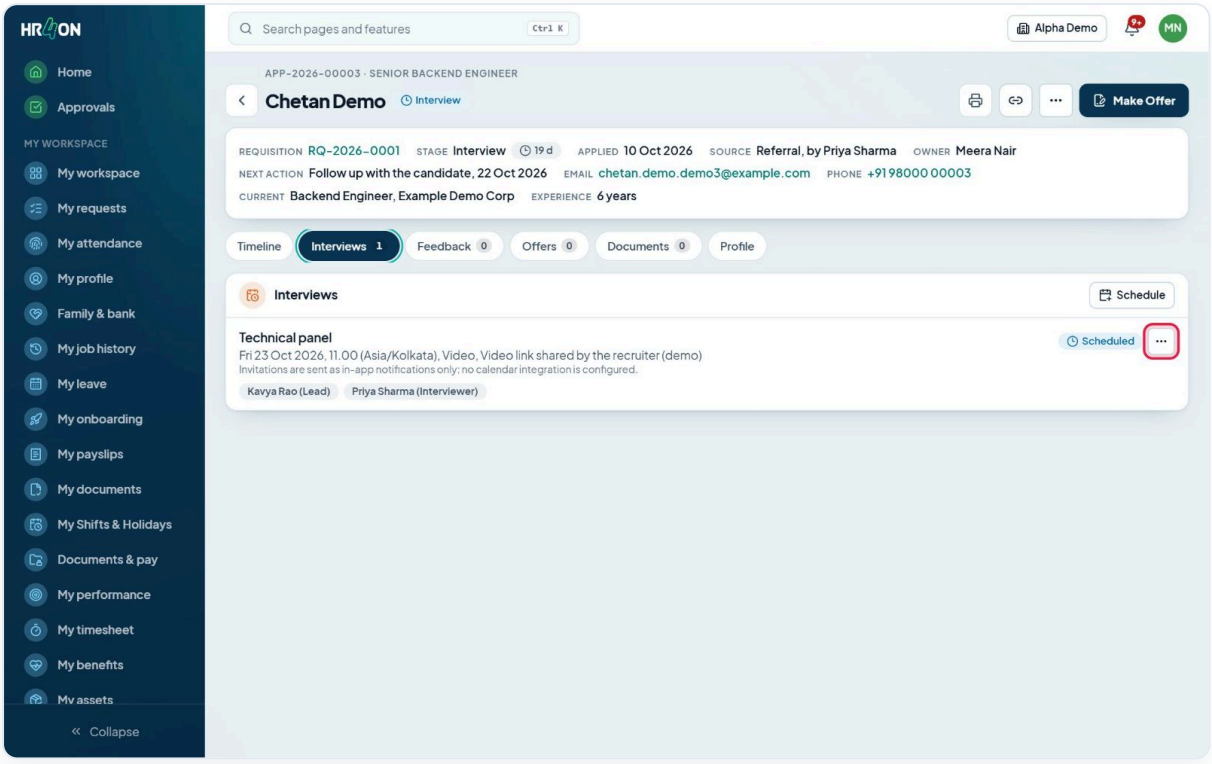


5.2 Manage scheduled interviews

The **Interviews** tab lists each interview with its time, channel, panel and status.

WHAT YOU SEE

- **Interview actions** holds **Reschedule**, **Mark completed**, **Candidate did not attend** and **Cancel interview**.
- Rescheduling asks for a reason and notifies the panel again.



5.3 What interviewers see and the scorecard

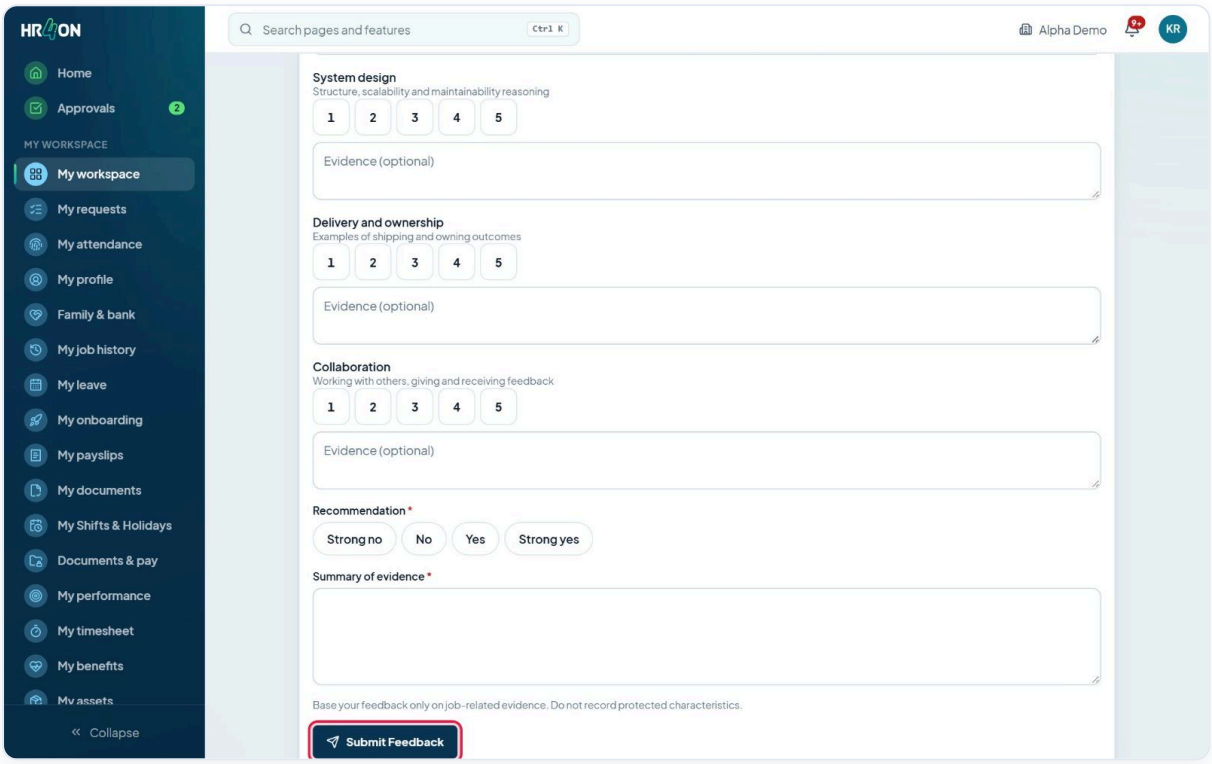
Interviewers find their interviews under **My interviews** and on their Home page. After the interview they rate each criterion and submit feedback.

WHAT YOU SEE

- **Job requirements** and **Candidate** give the interviewer the context.
- The **Scorecard** rates each criterion from 1 (no evidence) to 5 (strong evidence).
- **Recommendation** (**Strong no**, **No**, **Yes**, **Strong yes**) and **Summary of evidence** are required before **Submit Feedback**.

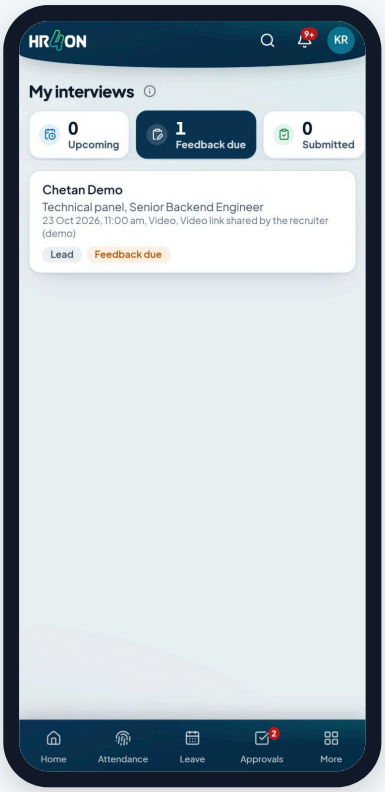
GOOD TO KNOW

- Feedback is visible according to your feedback rules; interviewers usually cannot see others' scores before submitting their own.



ON YOUR PHONE

An interviewer's **My interviews** on a phone, with feedback due.

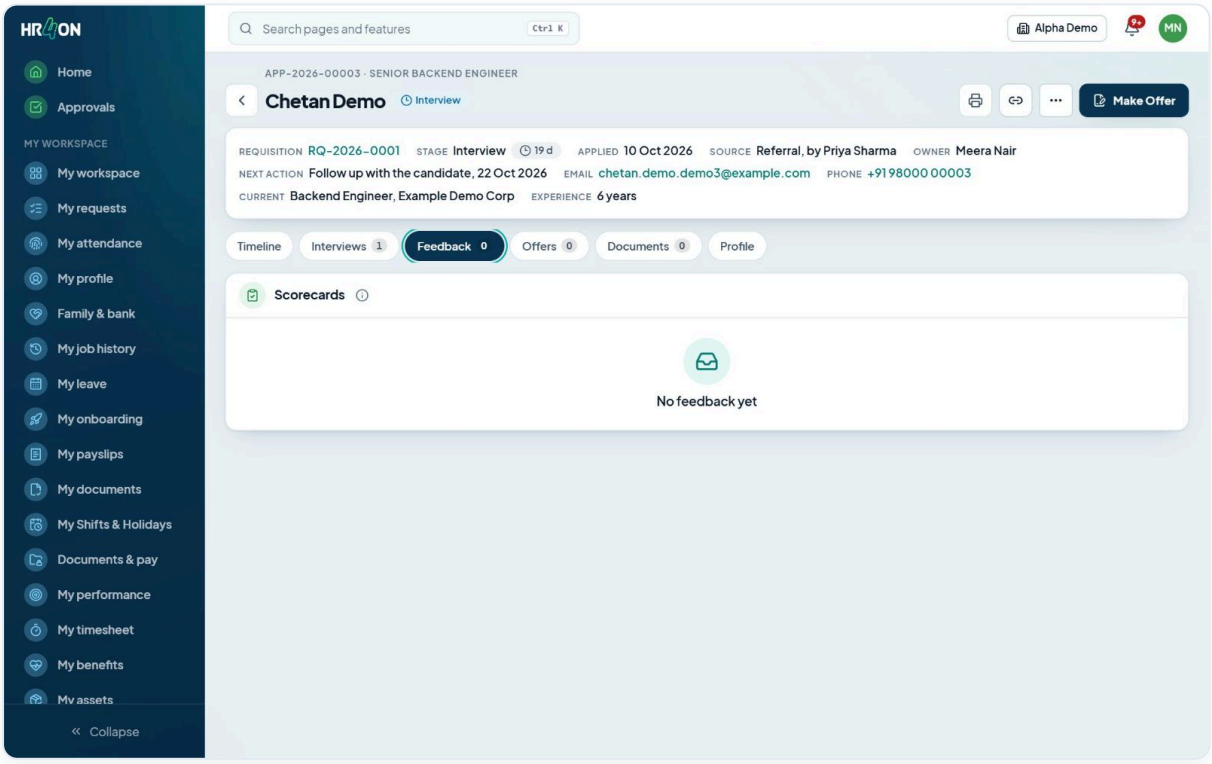


5.4 Read the feedback

Submitted scorecards appear on the application's **Feedback** tab, with each interviewer's ratings, recommendation and evidence.

HOW TO DO IT

1. Open the application and select **Feedback**.
2. Compare the recommendations, then move the candidate on or reject.



06 Offers

An offer records the agreed terms, goes through independent approval, is issued to the candidate and ends with their acceptance or decline.

6.1 Make an offer

Prepare the offer from the application.

WHAT YOU SEE

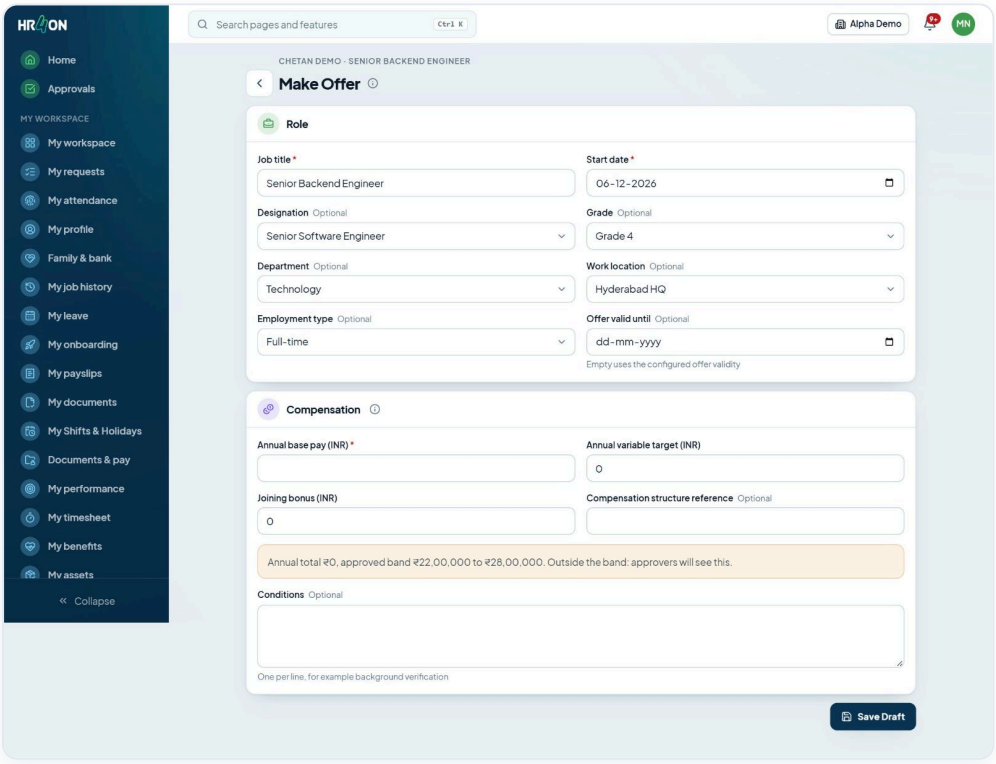
- **Role**: job title, start date, designation, grade, department, work location, employment type and how long the offer is valid.
- **Compensation**: annual base, variable target, joining bonus and the compensation structure reference. HR4ON shows whether the total is within the requisition band.
- **Conditions**: one per line, for example background verification.

HOW TO DO IT

1. Open the application and select **Make Offer**.
2. Fill the role and compensation.
3. Add conditions and save the draft.

GOOD TO KNOW

- Recruitment records the agreed terms only. The salary structure and payroll amounts are set up later in Compensation.



6.2 Approve, issue and record the answer

Open the offer to move it on. The strip at the top shows the next step.

WHAT YOU SEE

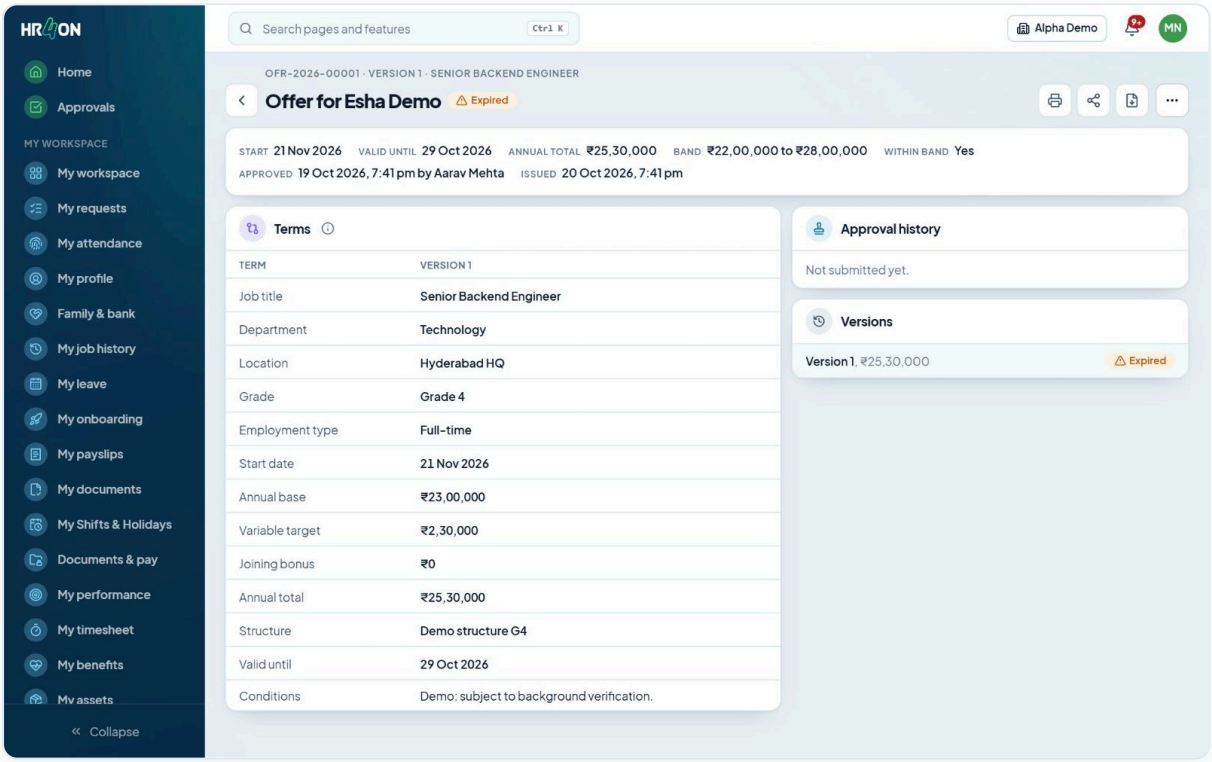
- Draft: **Submit For Approval**. An approver, not you, decides it in Approvals.
- Approved: **Issue Offer** generates the offer letter and sends it to the candidate.
- Issued: **More actions** holds **Record acceptance**, **Record decline**, **Revise (new version)** and **Withdraw offer**.
- **Terms** compares this version with the previous one. **Approval history** and **Versions** keep the record.
- An offer not answered by its valid-until date becomes **Expired**.

HOW TO DO IT

1. Open the offer from the application's **Offers** tab.
2. Follow the step in the strip.
3. When the candidate answers, record acceptance or decline with the evidence (for example their e-mail).

GOOD TO KNOW

- Recording acceptance moves the application to **Hired** and creates a hire handover in **Hires**.
- A revised offer is a new version and needs approval again.



07 From hire to preboarding

An accepted offer hands over to onboarding. You create the preboarding employee record once; HR4ON never creates a second.

7.1 Hires to hand over

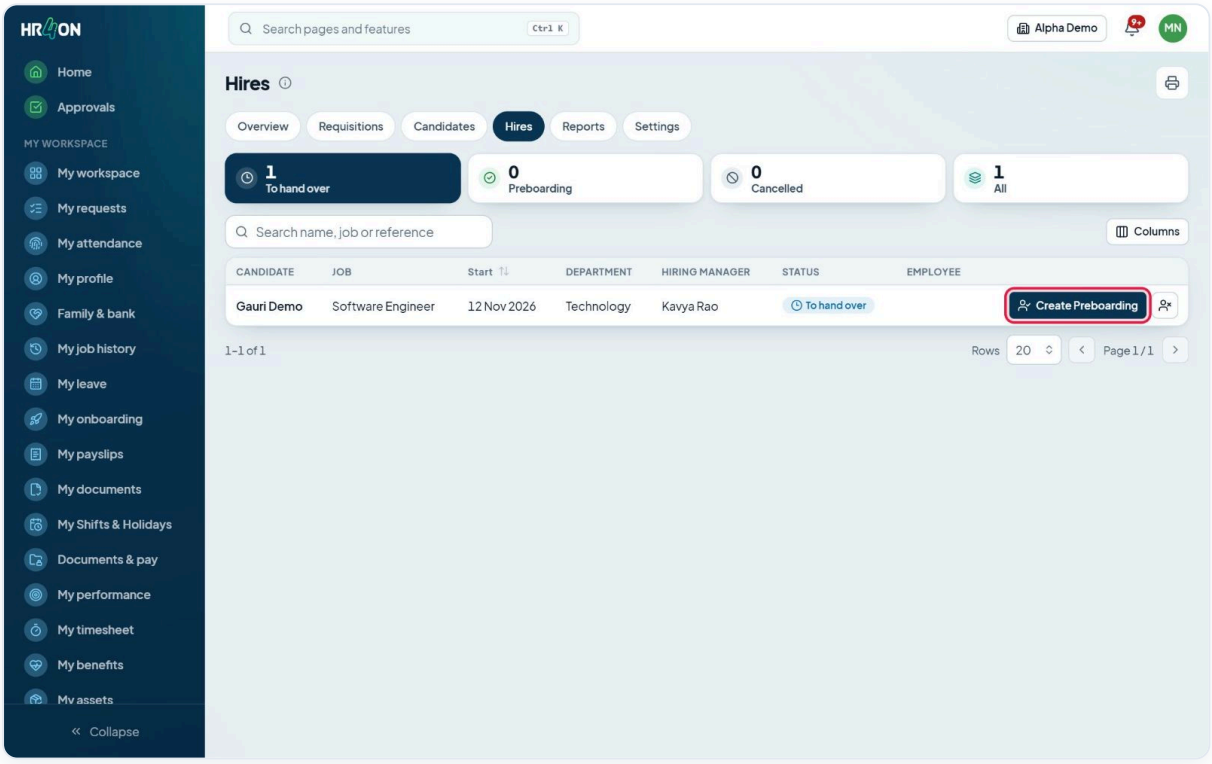
Hires lists accepted offers with the start date, department, hiring manager and status.

WHAT YOU SEE

- **To hand over**: accepted, waiting for HR to create the preboarding record.
- **Preboarding**: record created, onboarding under way.
- **Cancelled**: the candidate did not join.

HOW TO DO IT

1. Open **Recruitment**, then **Hires**.
2. Select **Create Preboarding** on the row.



7.2 Create the preboarding record

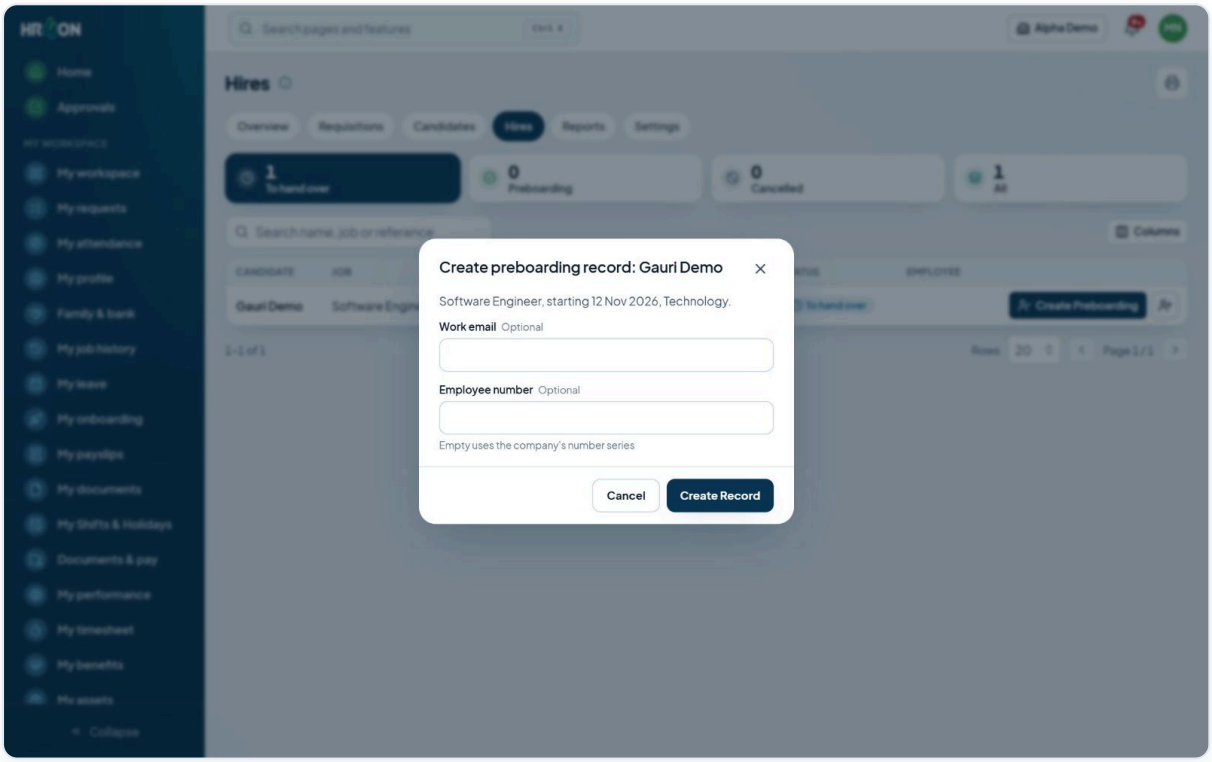
This creates the employee record with the status **Preboarding** and starts the onboarding case.

HOW TO DO IT

1. Select **Create Preboarding**.
2. Add the work email if IT has reserved one, and an employee number if you do not want the next number in the series.
3. Select **Create Record**.

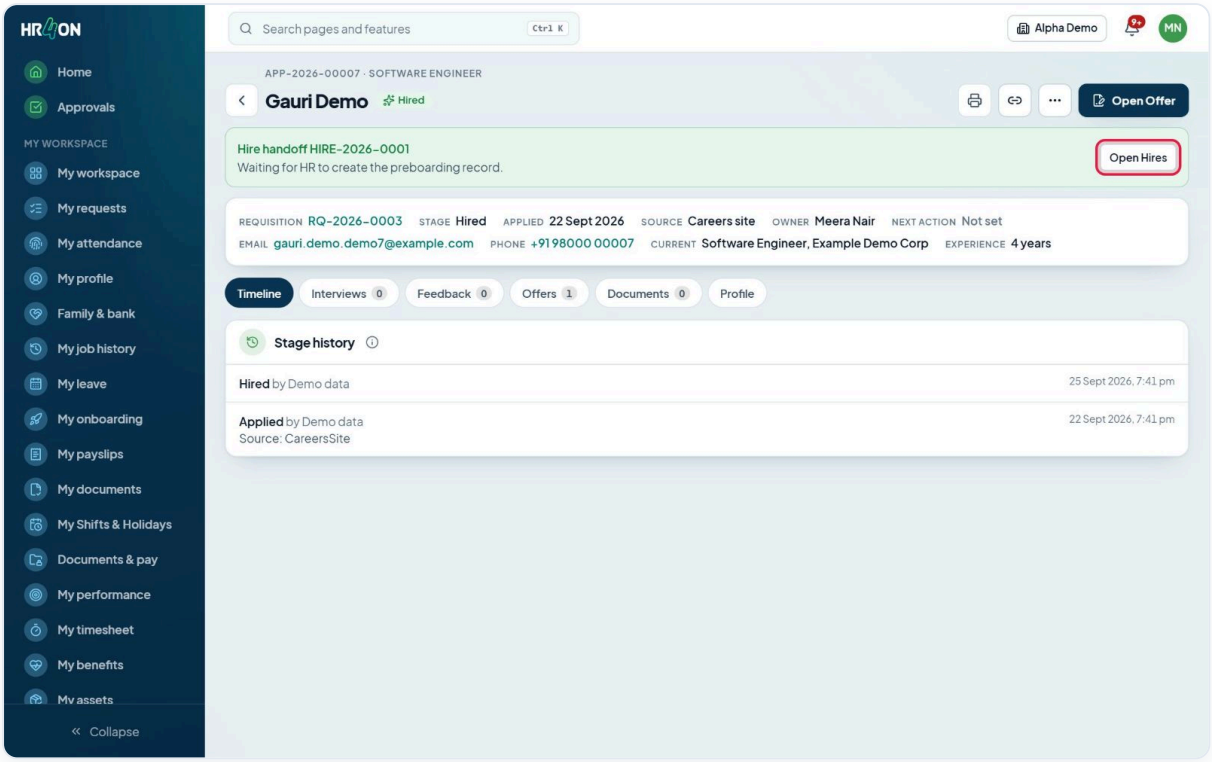
GOOD TO KNOW

- If HR4ON finds a possible existing person, check it. A returning employee should be rehired from Employees instead.
- Use the **No-show or withdrawn** icon if the candidate will not join.



7.3 The hand-over on the application

The application shows the hire hand-over reference and what is still to do.



08 Onboarding cases

Each joiner has an onboarding case that tracks their checklist, documents, checks, equipment and accounts from offer acceptance to the end of induction.

8.1 The joining pipeline

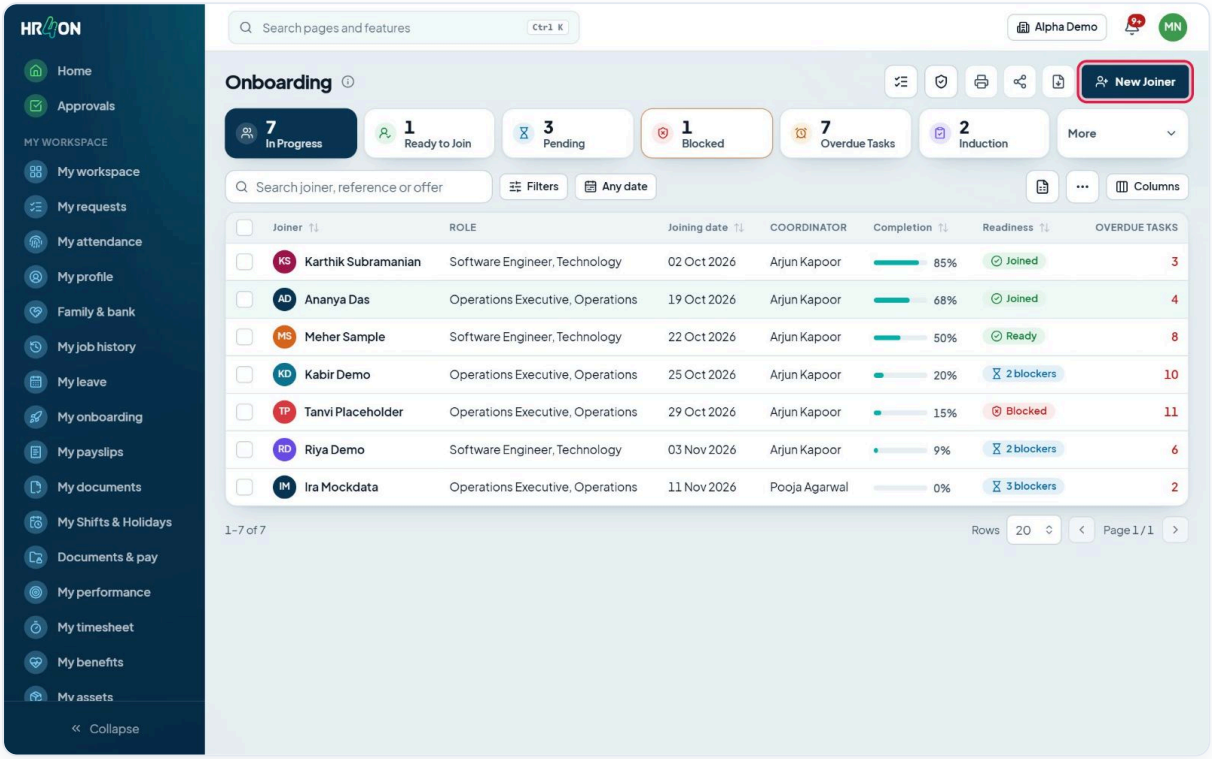
Onboarding lists every joiner with role, joining date, coordinator, completion and readiness.

WHAT YOU SEE

- Count tabs: **In Progress**, **Ready to Join**, **Pending**, **Blocked**, **Overdue Tasks** and **Induction** (joined, induction running). **More** holds completed, withdrawn, no-show and all cases.
- **Readiness** shows **Ready**, the number of blockers, **Blocked** or **Joined**.
- **More actions** opens **Checklist Templates** and **Onboarding Reports**.

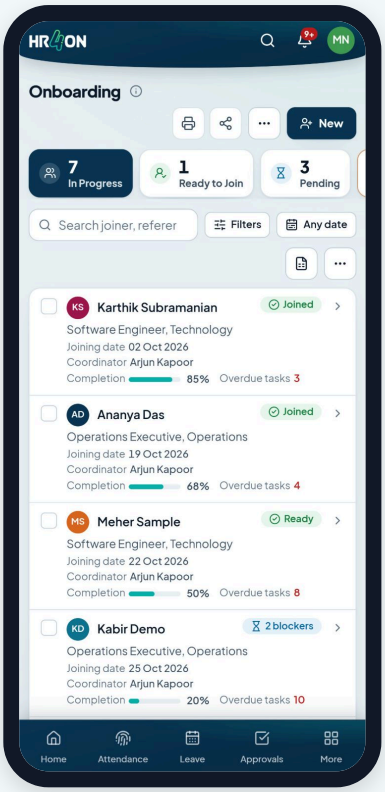
HOW TO DO IT

1. Select **Onboarding** in the **Hire** menu.
2. Choose a count tab, for example **Blocked**.
3. Select a row to open the case.



ON YOUR PHONE

The same screen on a phone. Menus collapse into the bottom bar and the ··· button.



8.2 Add a new joiner directly

Use **New Joiner** for people hired outside recruitment, for example an intern from a campus programme.

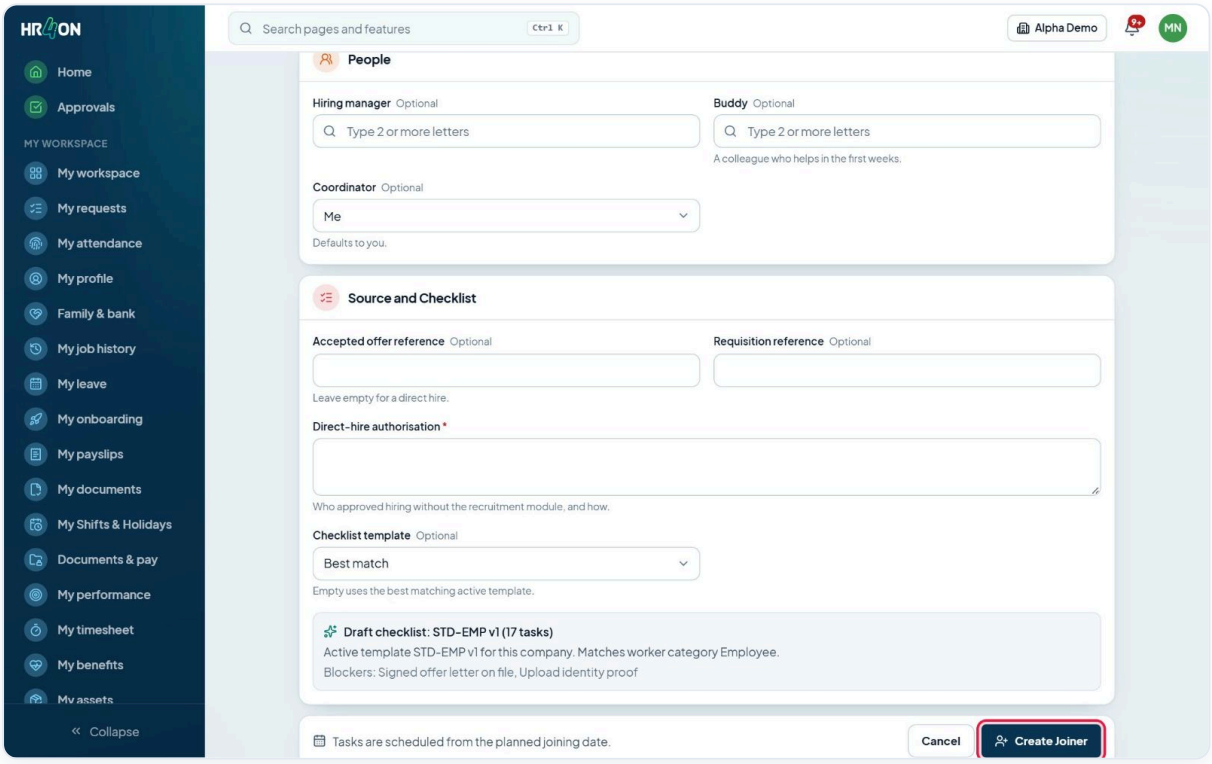
WHAT YOU SEE

- **Person**: company, worker category (employee or intern), name and personal contact details.
- **Role and Joining**: planned joining date, department, designation, branch, location, grade, employment type, work mode and work email.
- **People**: hiring manager, buddy and coordinator.
- **Source and Checklist**: the accepted offer or requisition reference, or a **Direct-hire authorisation** when there is neither, and the **Checklist template** (**Best match** picks the active template for the company and worker category).

HOW TO DO IT

1. Select **New Joiner**.
2. Fill each section.
3. Select **Create Joiner**.

> **GOOD TO KNOW**
> - The planned joining date is for planning only. It never starts payroll by itself.
> - Contractors are onboarded in Contingent workforce, not here.



8.3 The onboarding case

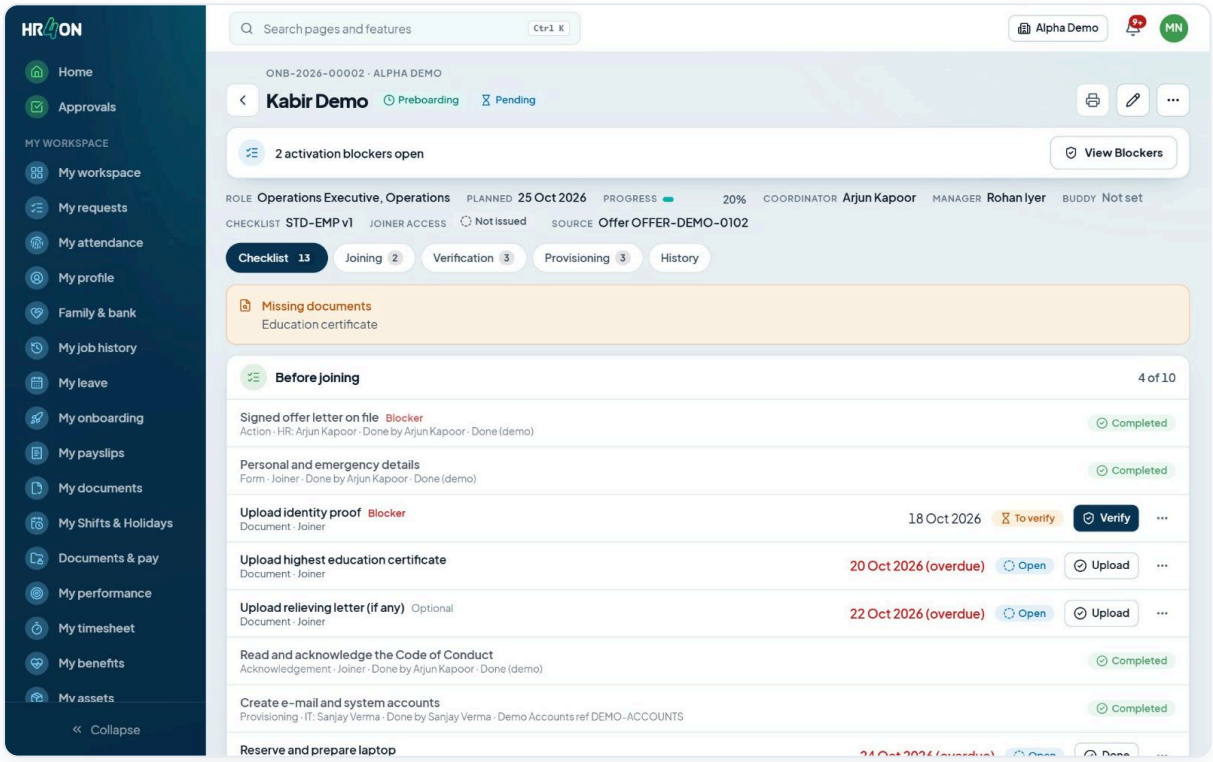
The case shows where the joiner stands and what blocks them.

WHAT YOU SEE

- The strip shows the next step: blockers to clear, **Ready: confirm joining on the first day**, or induction in progress.
- The header shows role, planned and actual joining date, progress, coordinator, manager, buddy, checklist, joiner access and the employee number.
- Tabs: **Checklist**, **Joining**, **Verification**, **Provisioning** and **History**.
- **View Blockers** jumps to what blocks joining.
- **More actions**: **Change Joining Date**, **Change Checklist**, **Give Joiner Access** (lets the joiner sign in before day one to do their own tasks), **Revoke Joiner Access**, **Request Exception**, **Mark No-show** and **Withdraw**.

HOW TO DO IT

1. Open the case from the pipeline.
2. Work through the tabs from left to right.



8.4 Checklist tasks and owners

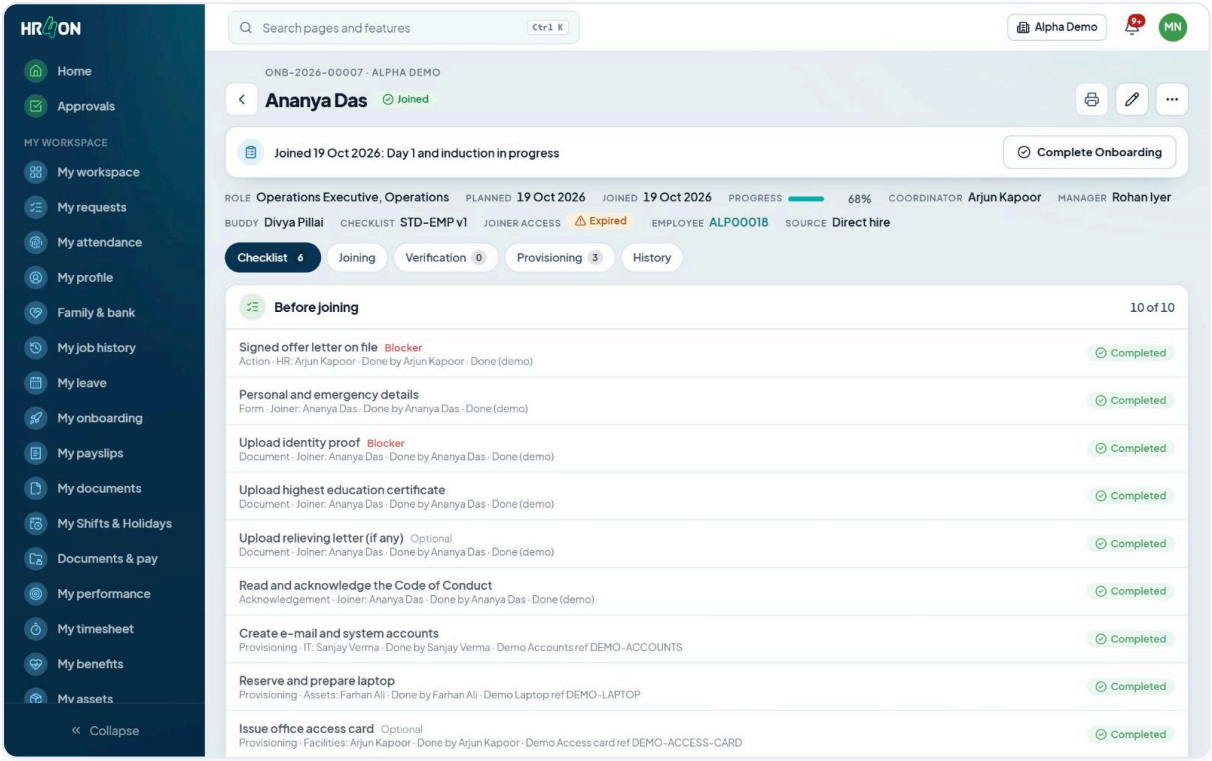
The checklist groups tasks by phase (before joining, Day 1, first week, first month). Each task has an owner: the joiner, HR, IT, facilities, assets, the manager or the buddy.

WHAT YOU SEE

- Each task shows owner, due date and state. Tasks that need checking show a **Verify** button once submitted.
- **Task actions** holds **Reassign or Change Due Date** and **Waive** (not for activation blockers).
- A **Missing documents** notice lists documents the joiner still has to upload.

HOW TO DO IT

1. Open the case on the **Checklist** tab.
2. Reassign tasks whose owner is away, or change due dates.
3. Waive tasks that do not apply, with a reason.



8.5 Joining blockers and exceptions

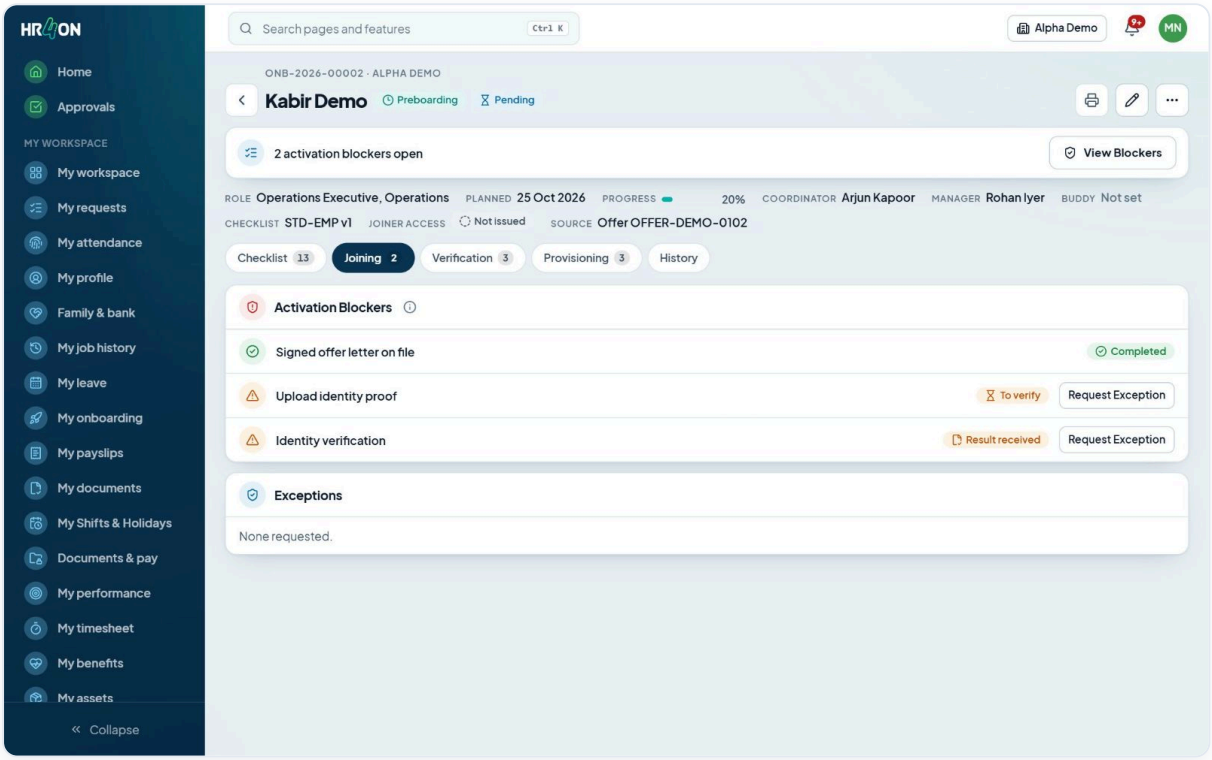
The **Joining** tab lists activation blockers: things that must be done or verified before the person can join, for example identity verification.

WHAT YOU SEE

- Each blocker shows its state. Hard blockers must be done, verified or covered by an approved exception that has not expired.
- **Request Exception** asks for approval to let the person join with a blocker open, until a date.
- **Exceptions** lists requested and approved exceptions with links to their approvals.

HOW TO DO IT

1. Open the case and select **Joining**.
2. Resolve each blocker, or select **Request Exception**, choose the blocker, the valid-until date and the reason, and send it for approval.



8.6 Background and identity checks

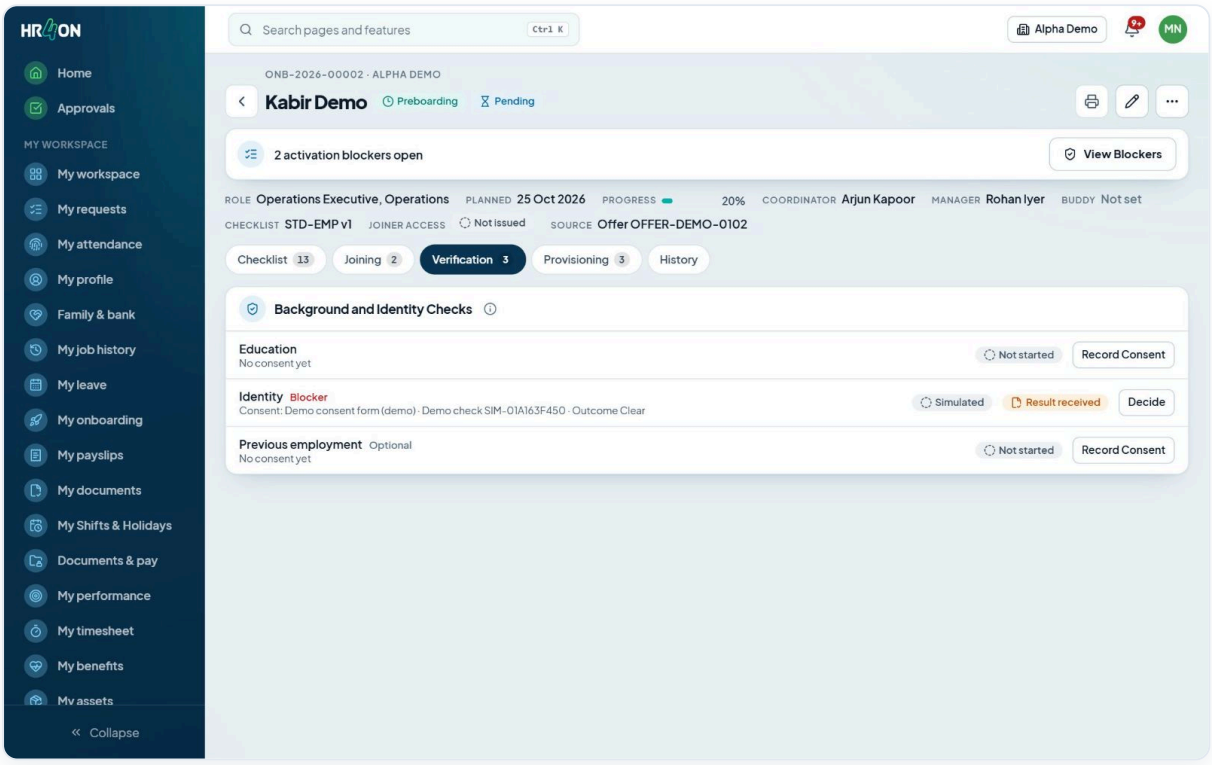
The **Verification** tab tracks background and identity checks, with consent, method, outcome and evidence.

WHAT YOU SEE

- States run from **Not started** to **Result received**, **Verified** or **Rejected**.
- Recording a result needs the consent reference, method, outcome and evidence (a file or reference). Restricted notes are visible only to verification readers.

HOW TO DO IT

1. Open the case and select **Verification**.
2. Record the consent and the result when it arrives.
3. Decide **Verified** or **Rejected** with a reason.

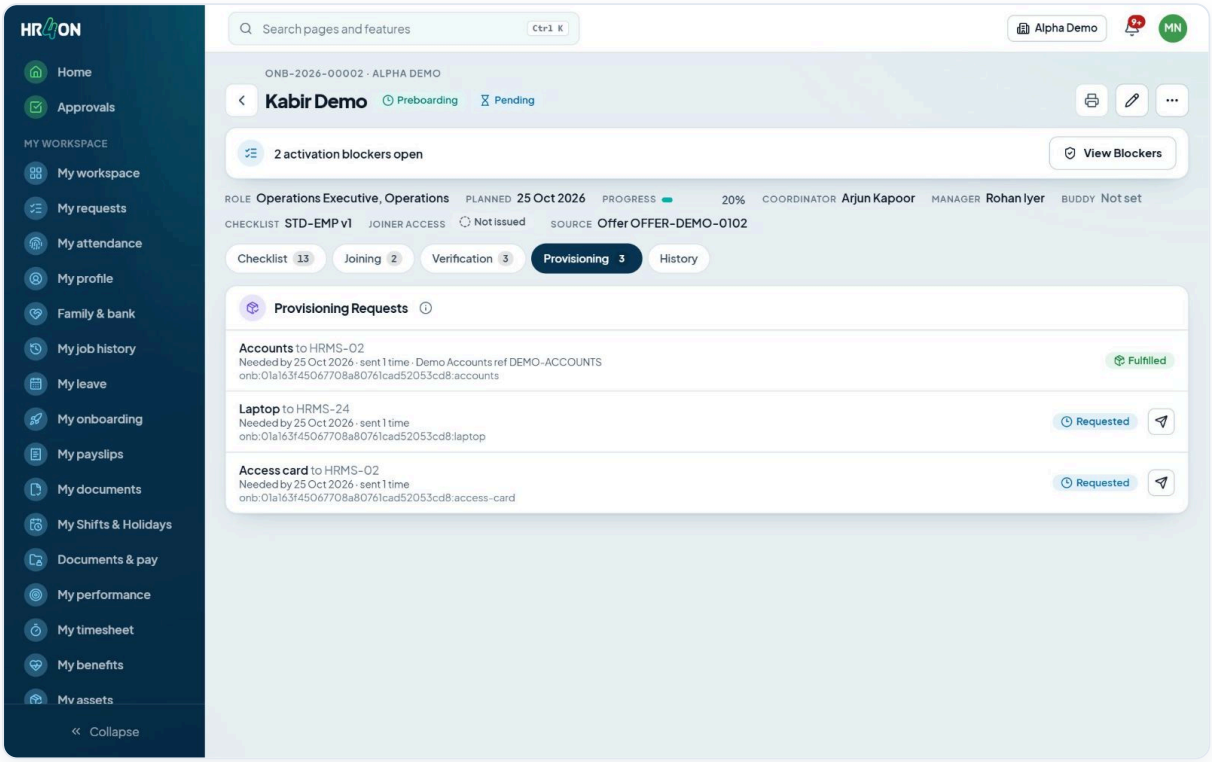


8.7 Equipment and accounts

The **Provisioning** tab lists the requests sent to Assets (laptop, phone, ID card) and to Access (accounts), with their status.

GOOD TO KNOW

- Sending a request again never creates a duplicate.



8.8 Day-one readiness and confirming joining

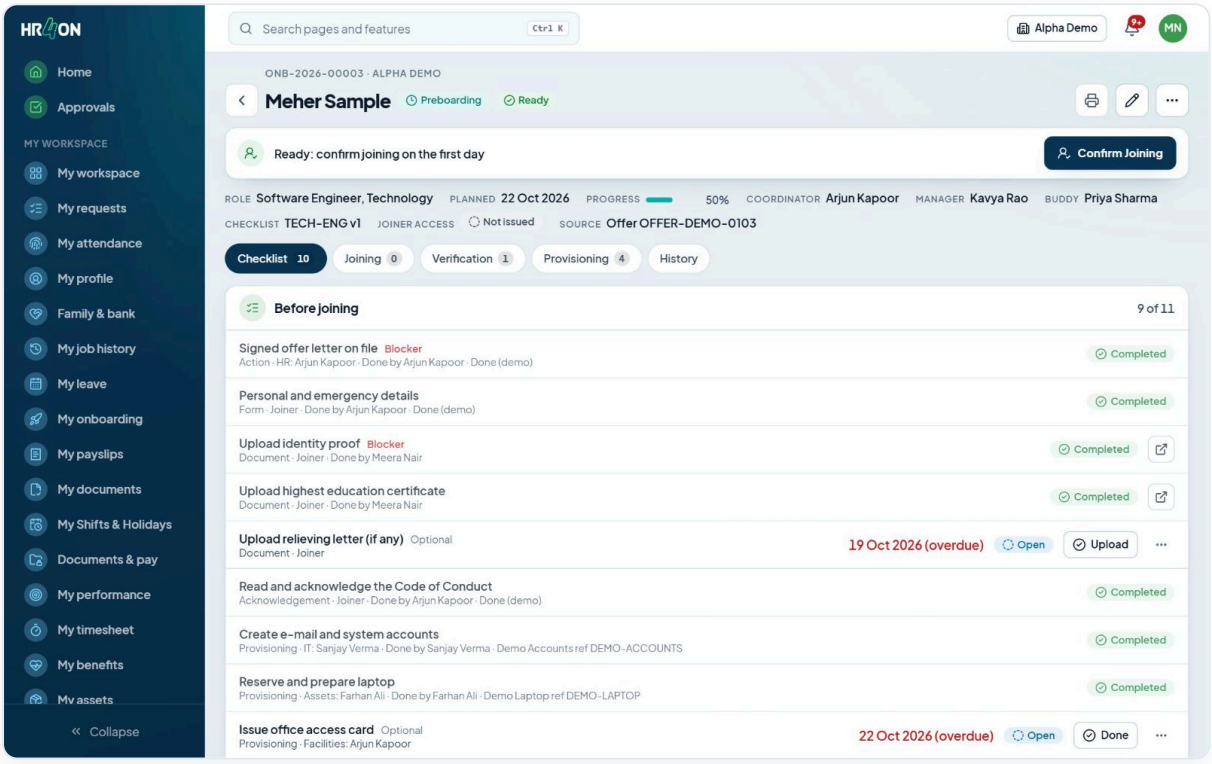
A case is **Ready** when every hard blocker is cleared. On the first day, confirm the person actually joined.

HOW TO DO IT

1. Open a ready case.
2. On the joining day select **Confirm Joining**.
3. Enter the **Actual joining date** and an optional note, then confirm.

GOOD TO KNOW

- The actual joining date cannot be in the future.
- Confirming joining activates the employee record and starts induction tasks.
- If the person does not turn up, use **Mark No-show**.
- When the induction tasks are done, open the case and select **Complete Onboarding** to close it.

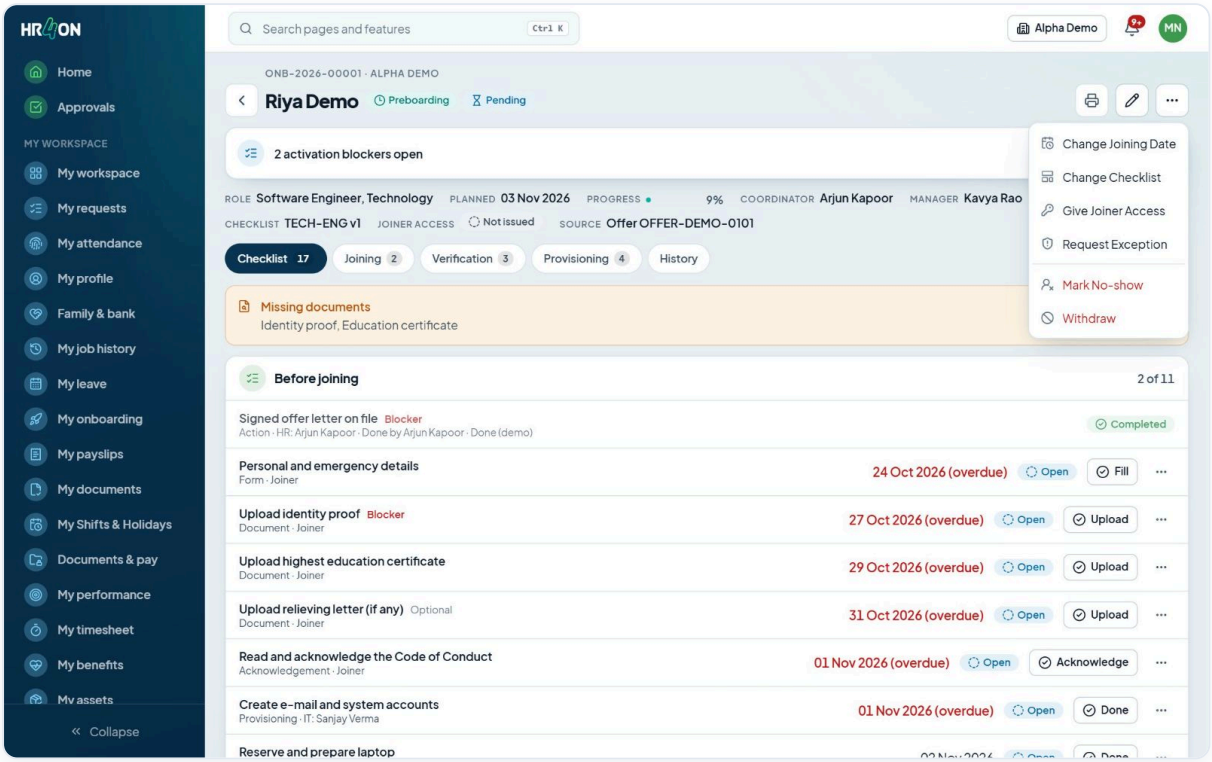


8.9 Change the joining date or withdraw

Plans change. Move the joining date or stop the onboarding from **More actions**.

WHAT YOU SEE

- **Change Joining Date** moves every task due date with it, except dates you changed by hand.
- **Withdraw** stops onboarding when the candidate pulls out before joining. **Mark No-show** is for someone who did not arrive.



09 Onboarding tasks and document verification

Task owners across HR, IT, facilities and assets work from one board, and HR checks the documents joiners upload.

9.1 The onboarding task board

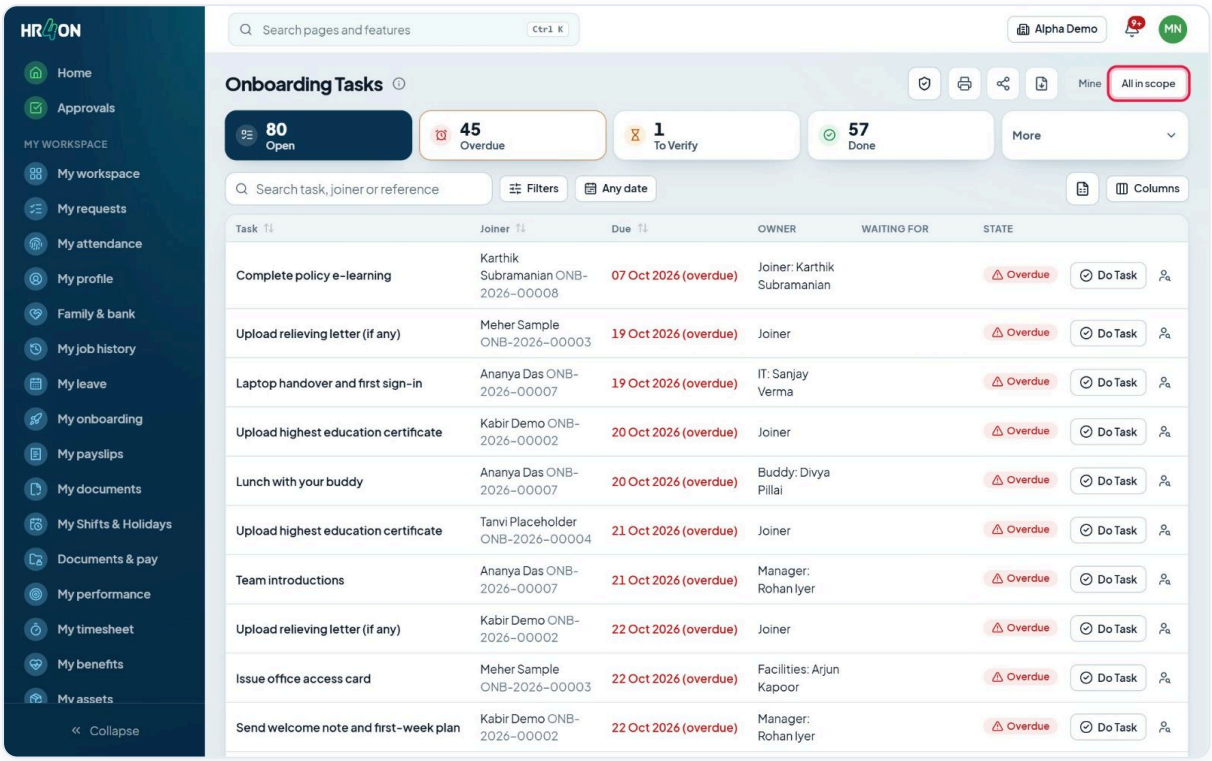
Onboarding Tasks lists tasks across all joiners: documents to verify, accounts and laptops to provide, Day 1 and induction.

WHAT YOU SEE

- **Mine** and **All in scope** switch between your tasks and everyone's.
- Count tabs: **Open**, **Overdue**, **To Verify** and **Done**.
- **Do Task** completes a task; the person icon reassigns it.

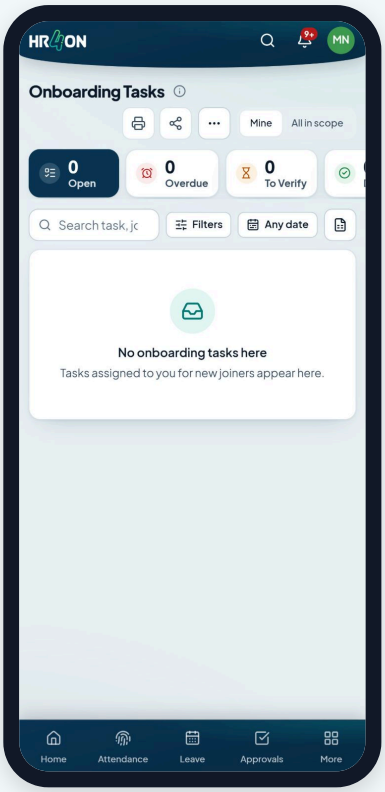
HOW TO DO IT

1. Select **Onboarding Tasks** in the **Hire** menu.
2. Select **All in scope** to see the whole team's work.
3. Select **Do Task** on a task, or open the joiner's case.



ON YOUR PHONE

The task board on a phone. **Mine** shows only tasks assigned to you; switch to **All in scope** to see all tasks.



9.2 Verify uploaded documents

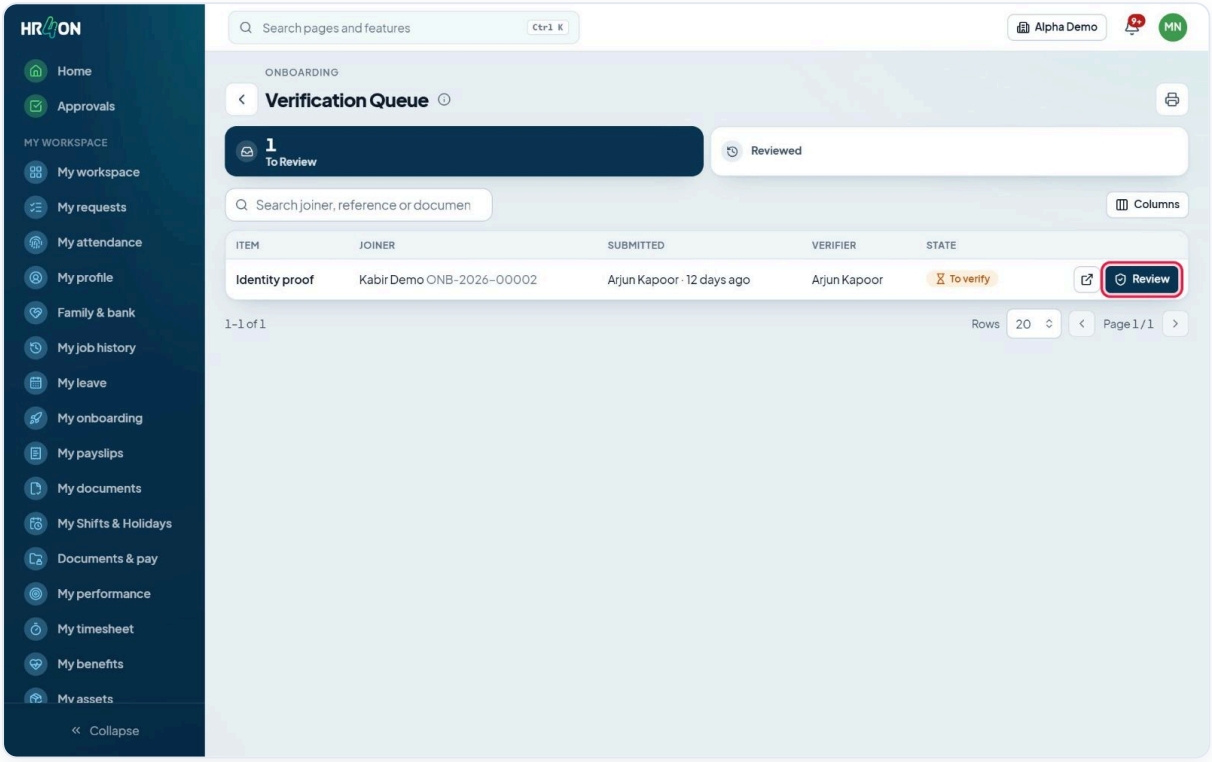
The **Verification Queue** lists documents joiners have uploaded that need checking, such as identity proof and education certificates.

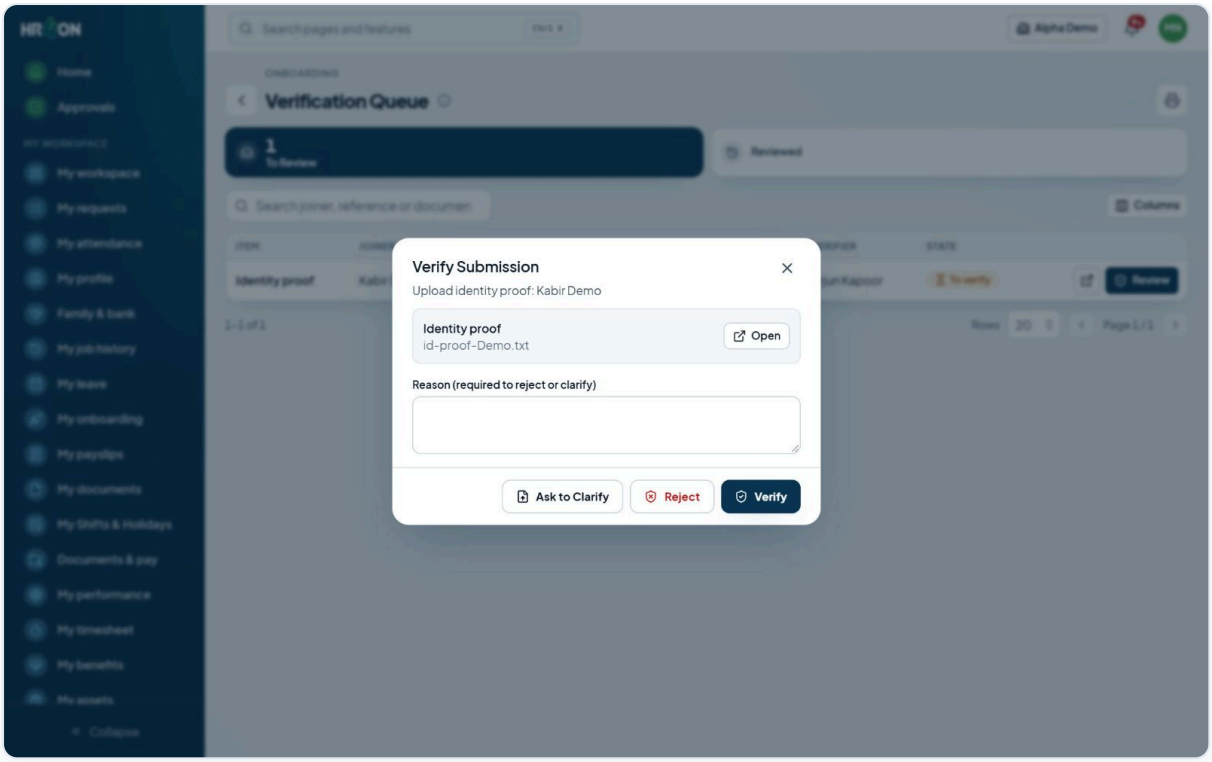
HOW TO DO IT

1. Open **Onboarding Tasks** and select the **Verification Queue** icon, or open it from the case.
2. Select **Review** on an item.
3. Open the file and compare it with the details.
4. Select **Verify**, or **Ask to Clarify** or **Reject** with a reason.

GOOD TO KNOW

- You cannot verify a document you uploaded yourself.
- The joiner is told what to fix when you ask to clarify or reject.




Verification Queue
1
To Review
Reviewed
Verify Submission
Upload identity proof: Kabir Demo
Identity proof
id-proof-Demo.txt
Open
Reason (required to reject or clarify)
Ask to Clarify
Reject
Verify

9.3 Checklist templates

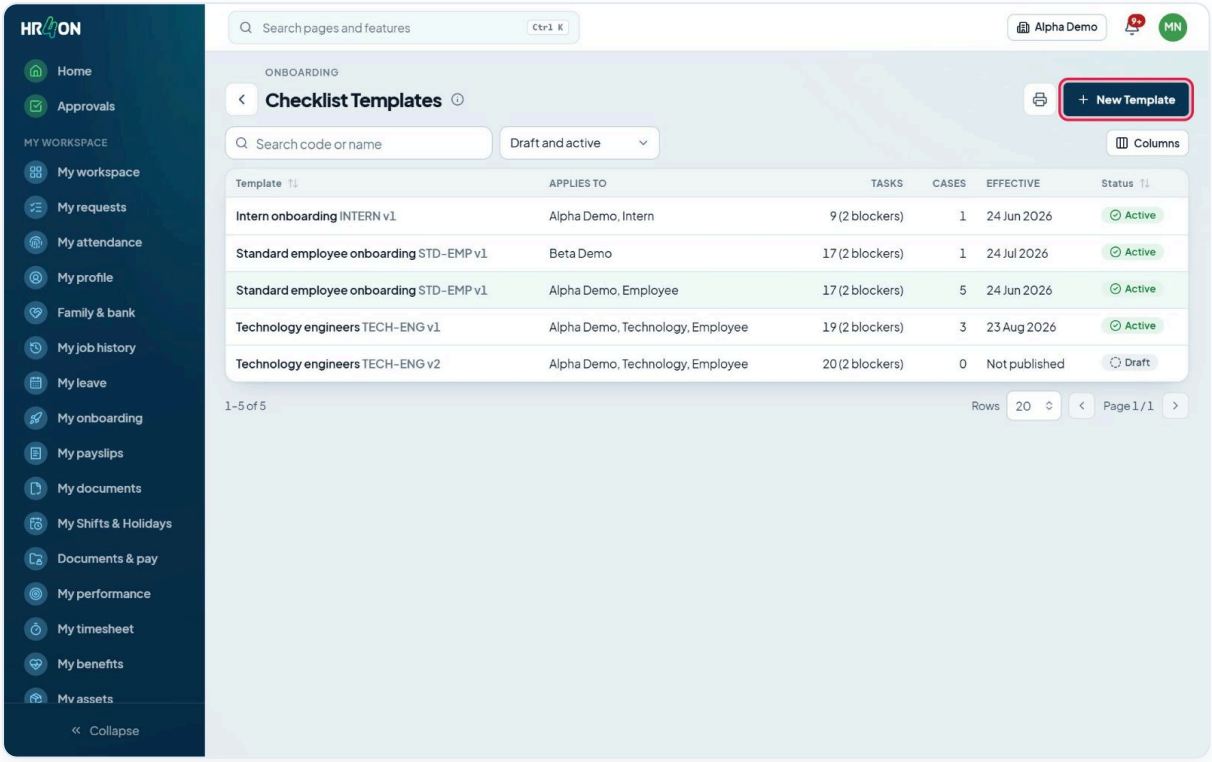
Templates define the tasks every joiner of a type gets: who owns each task, when it is due relative to the joining date and whether it blocks joining.

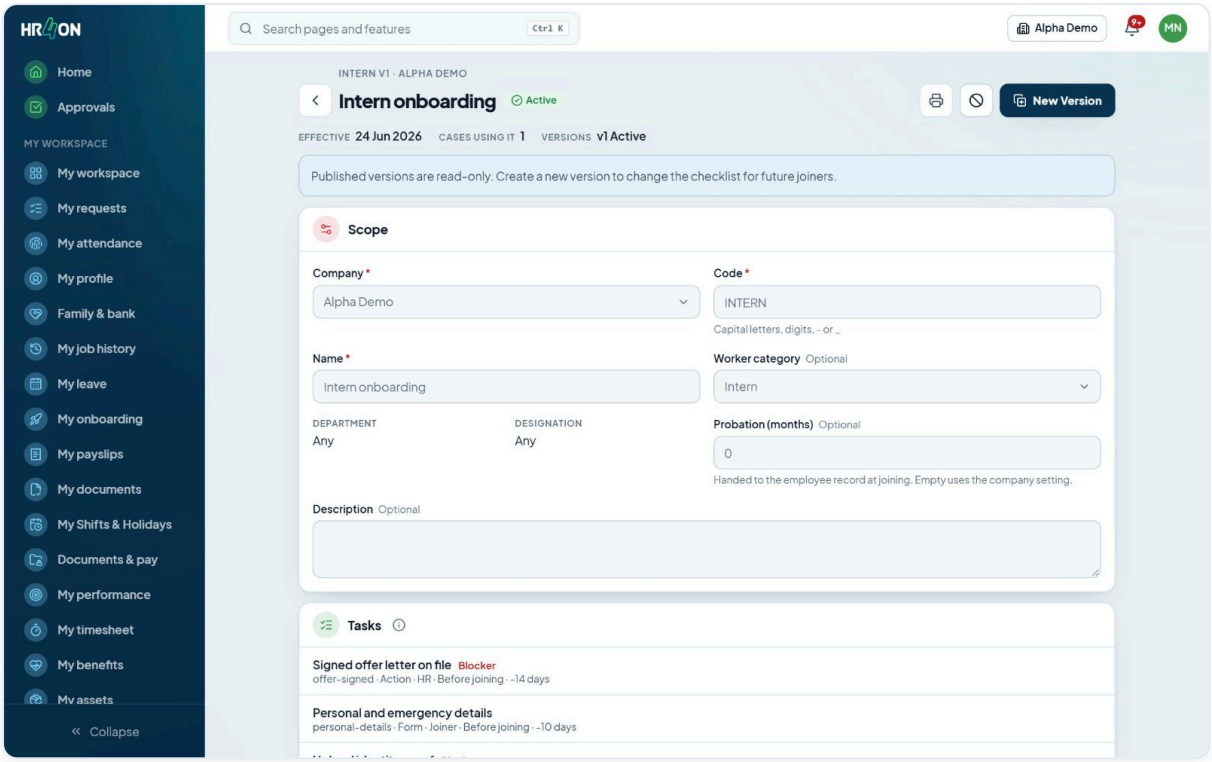
WHAT YOU SEE

- **Applies to** sets the company, department and worker category.
- Tasks have negative due days for before joining, 0 for Day 1 and positive days after.
- A published template is **Active**. Edit a new version as a **Draft**, then publish it. Existing cases keep their version.

HOW TO DO IT

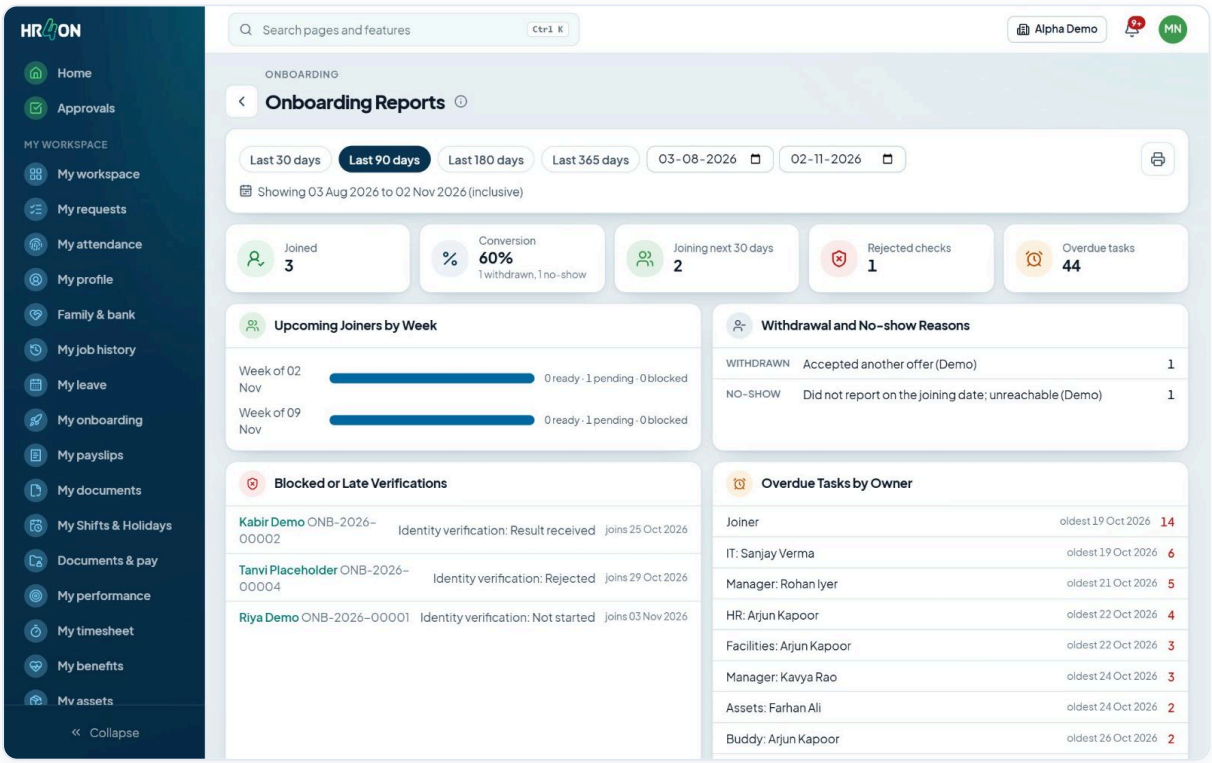
1. Open **Onboarding**, **More actions**, **Checklist Templates**.
2. Open a template, or select **New Template**.
3. Add tasks, then **Save Draft** and publish.





9.4 Onboarding reports

Reports show joiners and conversion, upcoming joiners by week, withdrawal and no-show reasons, blocked or late verifications and overdue tasks by owner.



10 The new joiner's view

Joiners see their own onboarding under **My onboarding** and on their Home page, from the day they accept until induction ends.

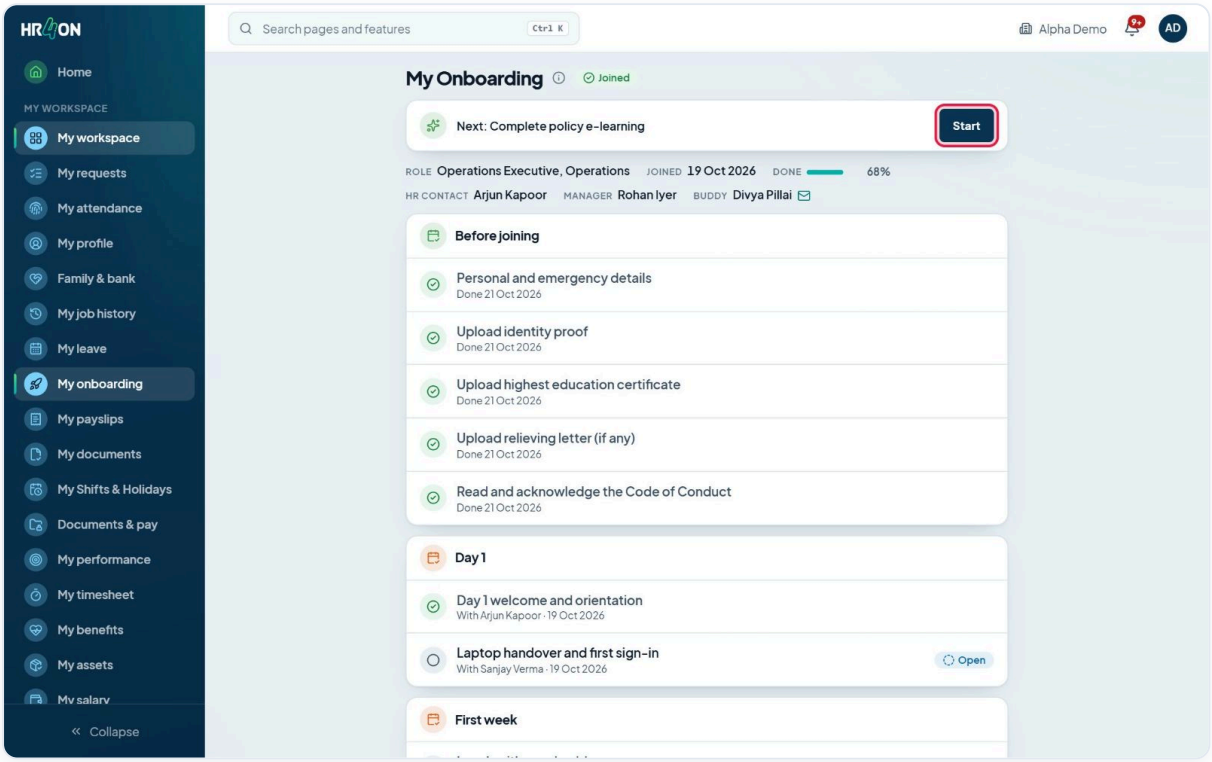
10.1 My onboarding

The joiner sees their next task with a **Start** button, their HR contact, manager and buddy, and the checklist by phase with due dates and who each task is with.

WHAT YOU SEE

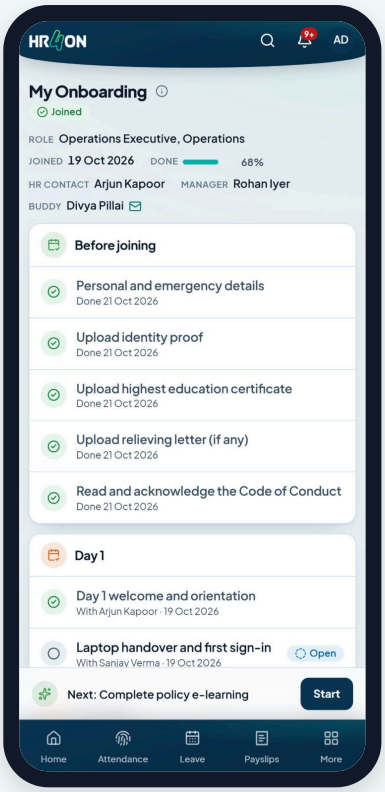
- Joiners complete their own tasks here: personal and emergency details, identity and education documents, policy acknowledgements and e-learning.
- Tasks owned by others (laptop handover, team introductions) show who they are with.

> **TIP**
> - Point joiners to this page if they ask what to do before their first day.



ON YOUR PHONE

The same screen on a phone. Menus collapse into the bottom bar and the ··· button.



11 Probation and confirmation

After joining, the probation review decides confirmation. It lives in **Employment changes**.

11.1 Probation reviews

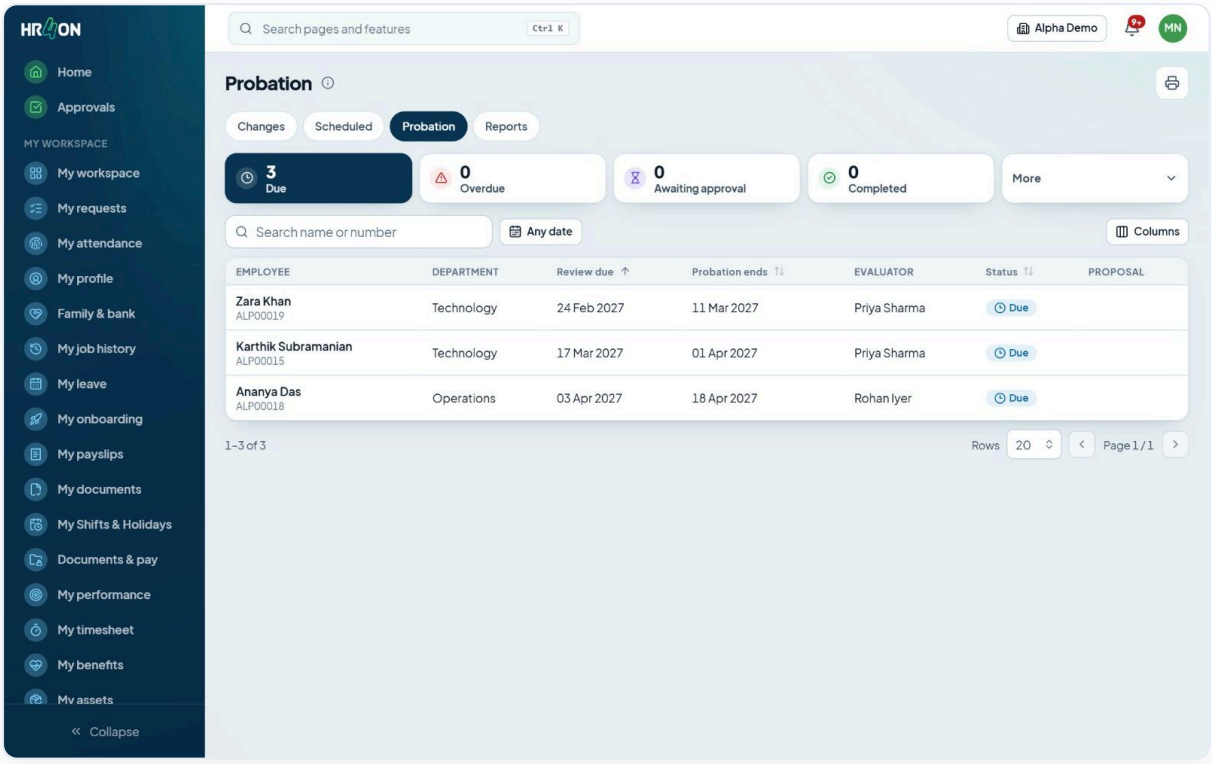
Employment changes, **Probation** lists reviews due, overdue, awaiting approval and completed, with the evaluator and the probation end date.

HOW TO DO IT

1. Open **Employment changes** and select **Probation**.
2. Open a review to see the criteria and outcome.
3. The evaluator submits; the confirmation or extension then goes for approval.

GOOD TO KNOW

- Confirmation letters are generated from Documents & letters once confirmation is approved.



12 Recruitment reports and settings

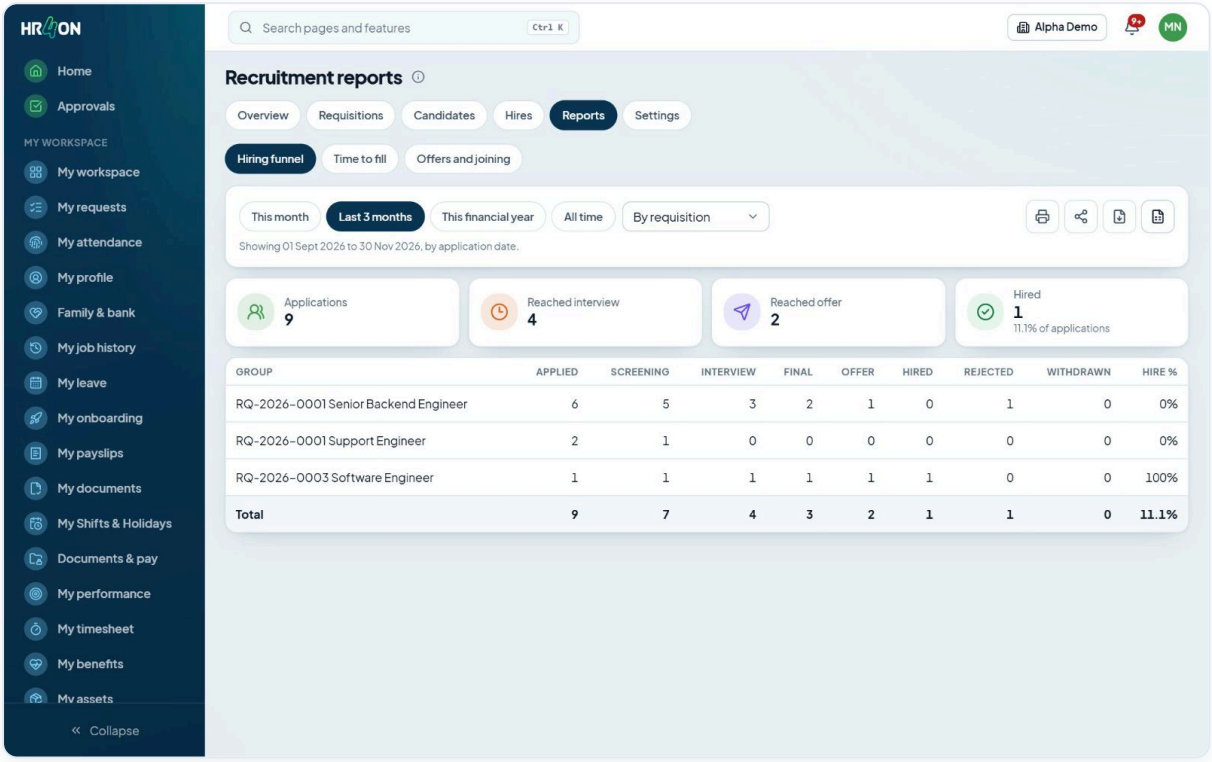
Measure how hiring is going and keep the pipeline stages and interview templates right.

12.1 Recruitment reports

Reports show the hiring funnel, time to fill and offers and joining, by requisition, source or location.

WHAT YOU SEE

- **Hiring funnel** counts applications reaching each stage and the hire percentage.
- **Time to fill** measures days from approval to acceptance.
- **Offers and joining** tracks acceptance, declines and no-shows.

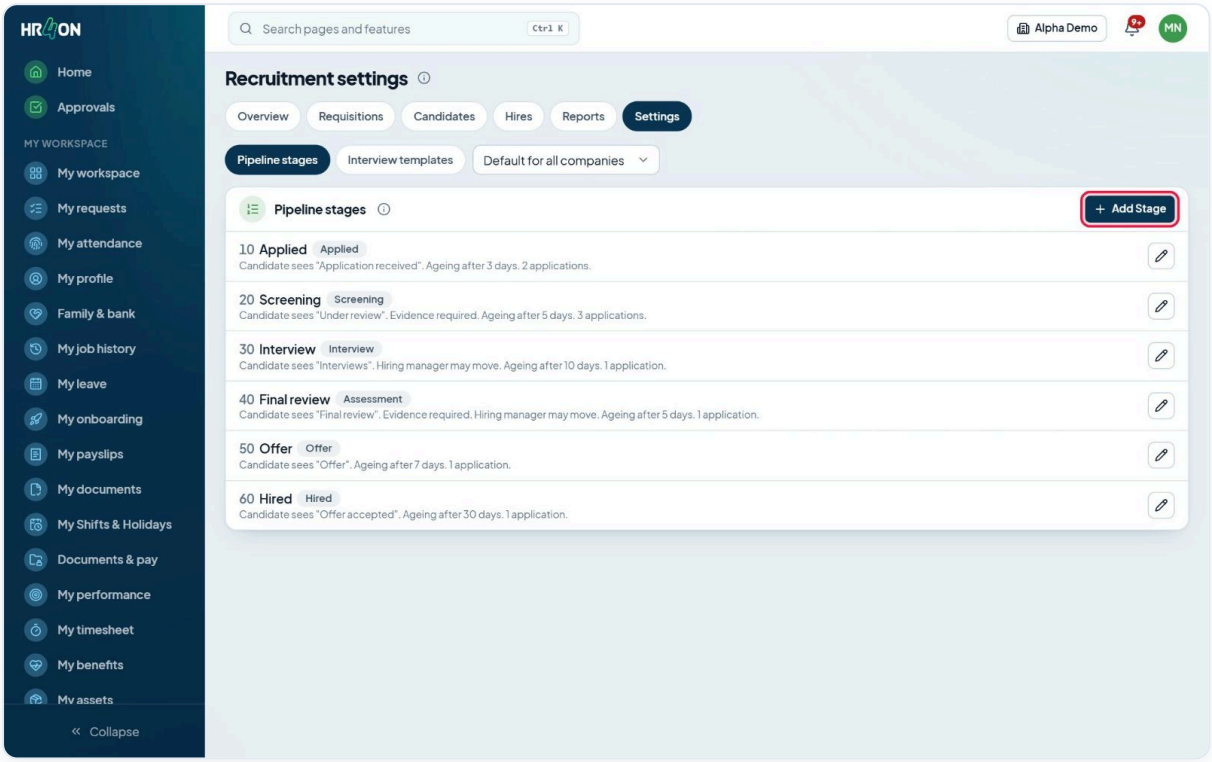


12.2 Pipeline stages and interview templates

Settings (HR administrators) sets the pipeline stages and interview scorecard templates, for all companies or one company.

WHAT YOU SEE

- Each stage has the name the candidate sees, whether evidence is required, whether the hiring manager may move candidates, and how many days before it counts as ageing.
- **Interview templates** set the scorecard criteria.



A Words used in this guide

Position
An approved seat in the organisation structure that a hire fills.

Requisition
The approved request to hire one or more people for a role.

Opening
One person to be hired on a requisition.

Posting
Publishing a requisition on a channel such as internal jobs or the careers site.

Application
One candidate applying for one requisition. Each is decided on its own.

Stage
A step in the pipeline, such as Screening or Interview.

Ageing
A candidate has stayed in a stage longer than the stage allows.

Owner
The HR person following up a candidate.

Scorecard
An interviewer's structured ratings, recommendation and evidence.

Panel
The interviewers for one interview.

Band
The salary range set on the requisition. Offers outside it are flagged.

Offer version
Each revision of an offer is a new version that needs approval.

Hire hand-over
An accepted offer waiting for HR to create the preboarding record.

Preboarding
The period between accepting an offer and the first day.

Onboarding case
One joiner's onboarding record with checklist, checks and provisioning.

Blocker
Something that must be done or verified before the person can join.

Exception
Approved permission to join with a blocker still open, until a date.

Buddy
A colleague who helps the joiner in their first weeks.

Coordinator
The HR person who looks after a joiner's case.

No-show
A joiner who did not arrive on the joining day.

Induction
The first weeks after joining, with Day 1, first week and first month tasks.