USER GUIDE

HR Guide: Performance, Learning and Engagement

Run review cycles, training, workforce plans, communications, surveys, recognition and the HR service desk.

WHO IT'S FOR

HR administrators, talent and learning teams, internal communications and HR service desk case workers

COVERS

Performance cycles, goals, check-ins, reviews, calibration and outcomes; learning catalogue, assignments, sessions and certificates; positions, scenarios, budgets, succession and internal moves; feed, communications, surveys, recognition and insights; HR service desk cases and employee relations

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

About this guide

This guide is for the HR people who help employees grow and stay engaged: running the performance cycle, organising training, planning the workforce, talking to the company and answering employees' questions and concerns.

The work is under **Grow** in the menu (**Performance**, **Learning**, **Workforce planning**) and **Engage** (**Feed**, **Communications**, **Surveys**, **Recognition**, **Engagement Insights**, **HR service desk**). Employees' own pages (My performance, My learning, Internal opportunities, HR requests) are explained in the Employee Guide.

Most screenshots show Meera Nair, HR administrator at Alpha Demo. The HR service desk chapter shows Lakshmi Menon, the HR case worker who handles employee relations cases. You only see the people and cases your access covers.

What you can do in HR4ON

- Set up and run a performance cycle from goals to released outcomes
- Calibrate ratings and turn outcomes into pay and promotion proposals
- Manage development and improvement plans
- Publish courses, assign required training, run sessions and verify certificates
- Maintain positions, build headcount scenarios and send them for budget approval
- Plan succession and offer internal moves
- Publish announcements, run surveys and manage recognition programmes
- Handle HR service desk cases, including confidential grievances

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. Names, cycles and numbers in the screenshots come from the demo company.

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01 Performance cycles

A review cycle takes everyone in scope from goal setting through self review, manager review and calibration to a released outcome. HR sets the cycle up and keeps it moving.

1.1 Find your way around Performance

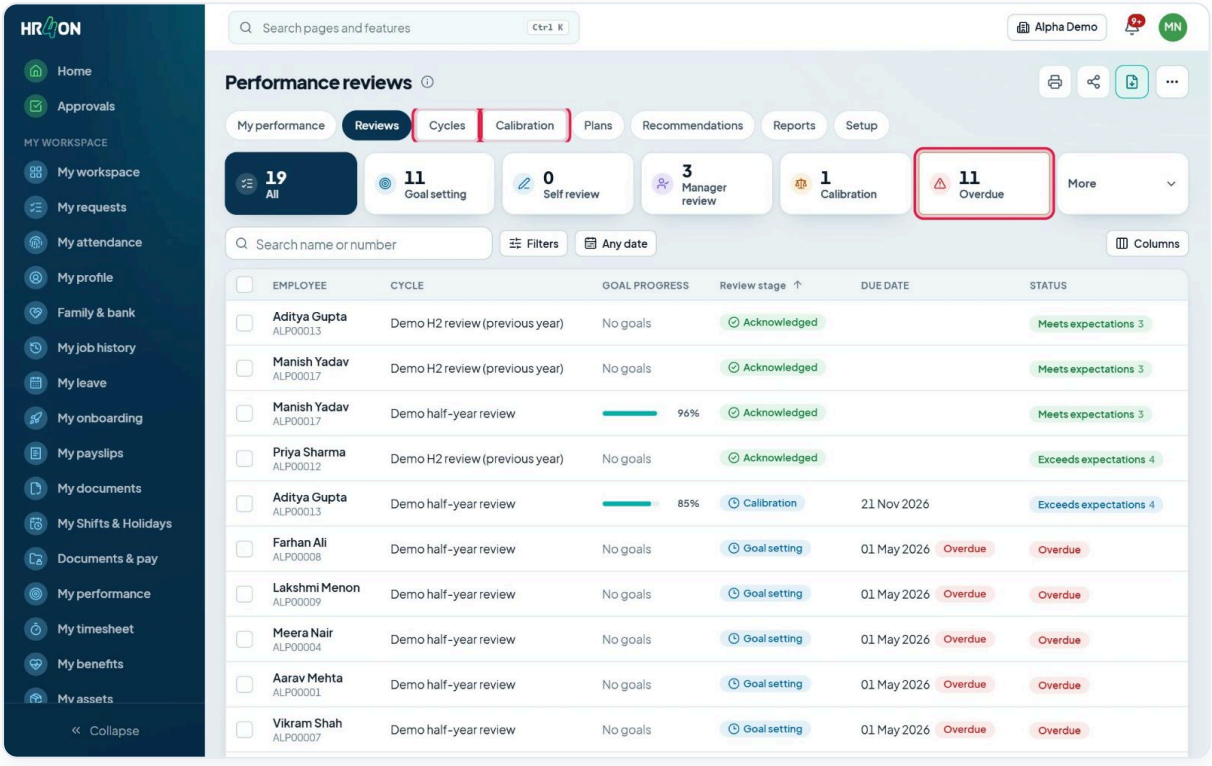
Open **Performance** under **Grow**. The tabs across the top cover every part of the cycle.

THE PERFORMANCE TABS

- **Reviews**: one row per employee and cycle, with stage, goal progress, due date and status.
- **Cycles**: the review cycles themselves.
- **Calibration**, **Plans** and **Recommendations**: rating moderation, development and improvement plans, and pay or promotion recommendations.
- **Reports** and **Setup** are in the page links.

HOW TO DO IT

1. Open **Performance**.
2. Use the stage tiles (**Goal setting**, **Self review**, **Manager review**, **Calibration**, **Overdue**) to see where people are.
3. Select a row to open the person's review.



1.2 Set up rating scales and policies

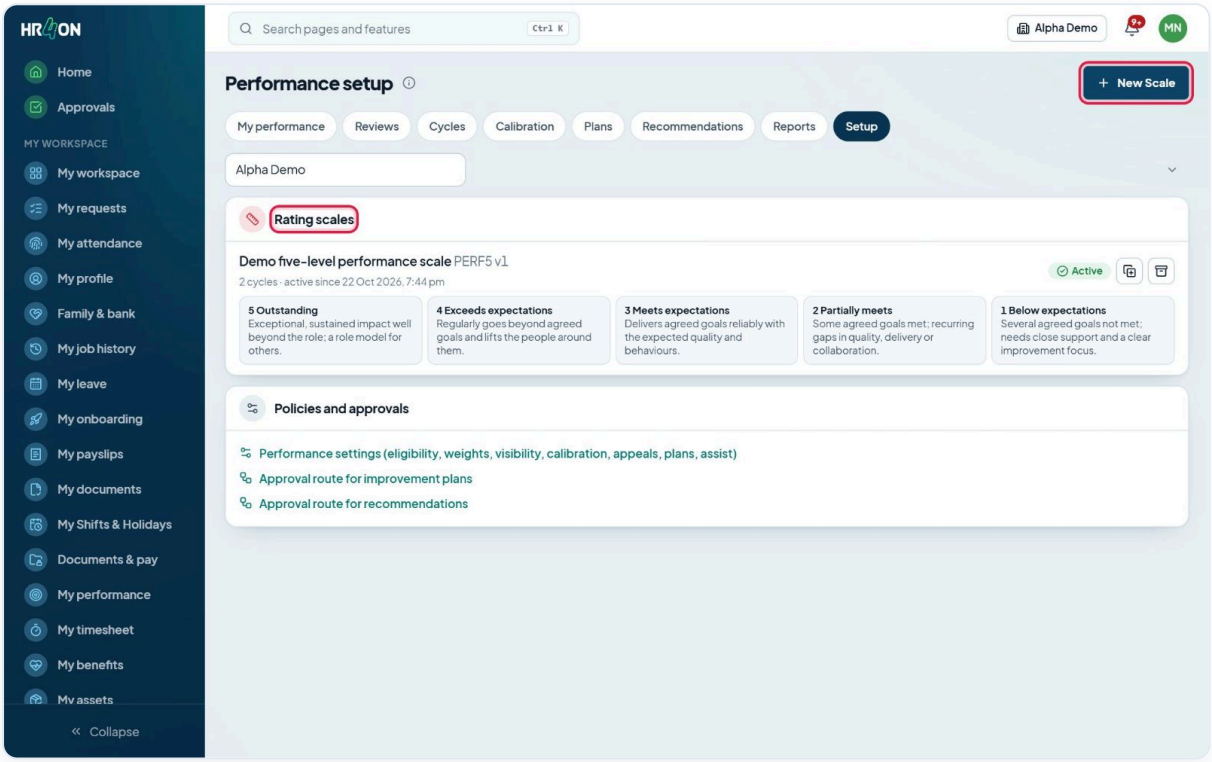
Setup holds the rating scales and the approval routes for improvement plans and recommendations.

WHAT YOU SEE

- Each scale lists its levels, lowest first, with the description managers see.
- Scales are versioned: an active version never changes, so earlier ratings stay reproducible.
- **Performance settings** opens eligibility, weights, visibility, calibration, appeal and plan settings.

HOW TO DO IT

1. Open **Setup**.
2. Select **New Scale** or **New version** to change a scale, add levels and **Save Draft**.
3. Select **Activate** when it is ready.



1.3 Create a review cycle

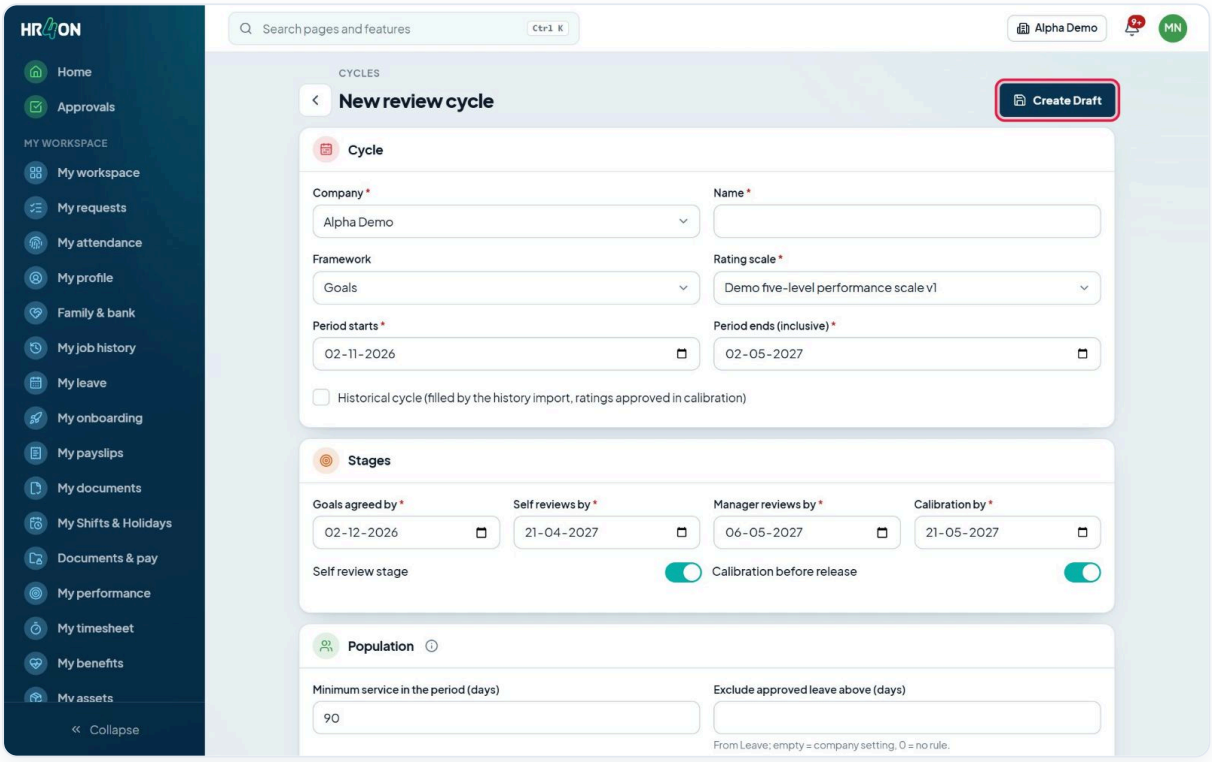
The cycle form pins the rating scale, goal rules, visibility and calibration settings. Later policy changes never alter a running cycle.

WHAT YOU SEE

- **Cycle**: **Name**, **Company**, **Framework**, period and **Rating scale**.
- **Population**: who is included, with switches for **Include interns**, **Include people on probation** and **Include people on notice**.
- **Stages**: **Goals agreed by**, **Self reviews by**, **Manager reviews by** and **Calibration by**, with switches for the **Self review stage** and **Calibration before release**; **Peer feedback** and **Anonymous peers**.
- **Goals, visibility and calibration**: goal weights, **Calibration before release**, and **Enforce the distribution (forced distribution)**.
- **Evaluator**: **Manager at launch** or **Follows the current manager**.

HOW TO DO IT

1. Open **Cycles** and select **New Cycle**.
2. Fill in each part, including **Minimum service in the period (days)** under **Population**.
3. Select **Create Draft**. The cycle stays a **Draft** until you launch it.



1.4 Launch the cycle and move it through its stages

The cycle page shows the stages, population and company objectives, and has a button for the next step.

WHAT YOU SEE

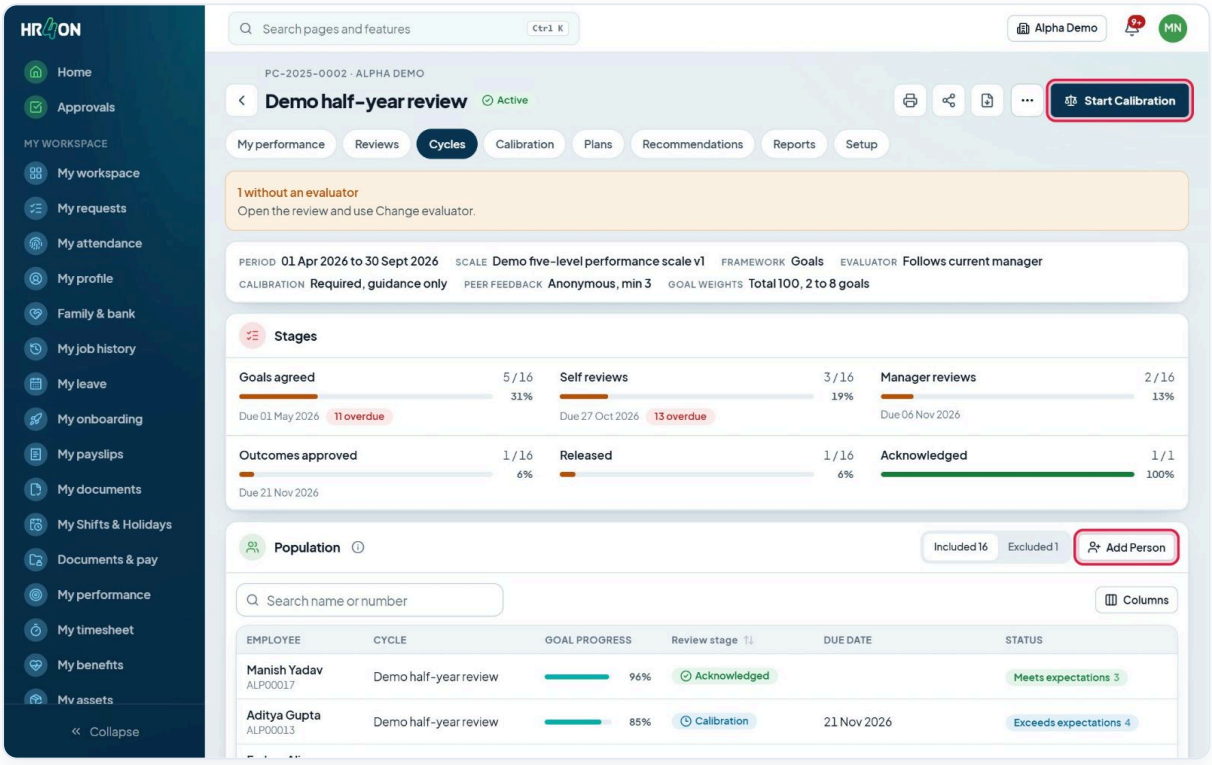
- **Stages**: each stage with its dates and completion.
- **Population**: everyone included, with eligibility reasons. Use **Add Person** or exclude someone with a reason; the change is recorded in **History**.
- **Company objectives**: shared objectives individual goals align to (**Add Objective**).

HOW TO DO IT

1. Open the cycle and check the **Population preview**.
2. Select **Launch**. The population is snapshotted and everyone included is asked to set goals.
3. When goals are agreed, select **Open Reviews** to request self and manager reviews.
4. When manager reviews are in, select **Start Calibration**, and finally **Release** approved outcomes and **Close Cycle**.

GOOD TO KNOW

- Each step asks you to confirm and is recorded in the cycle history.
- Employees with a released outcome are asked to acknowledge receipt.



1.5 Follow goals and check-ins

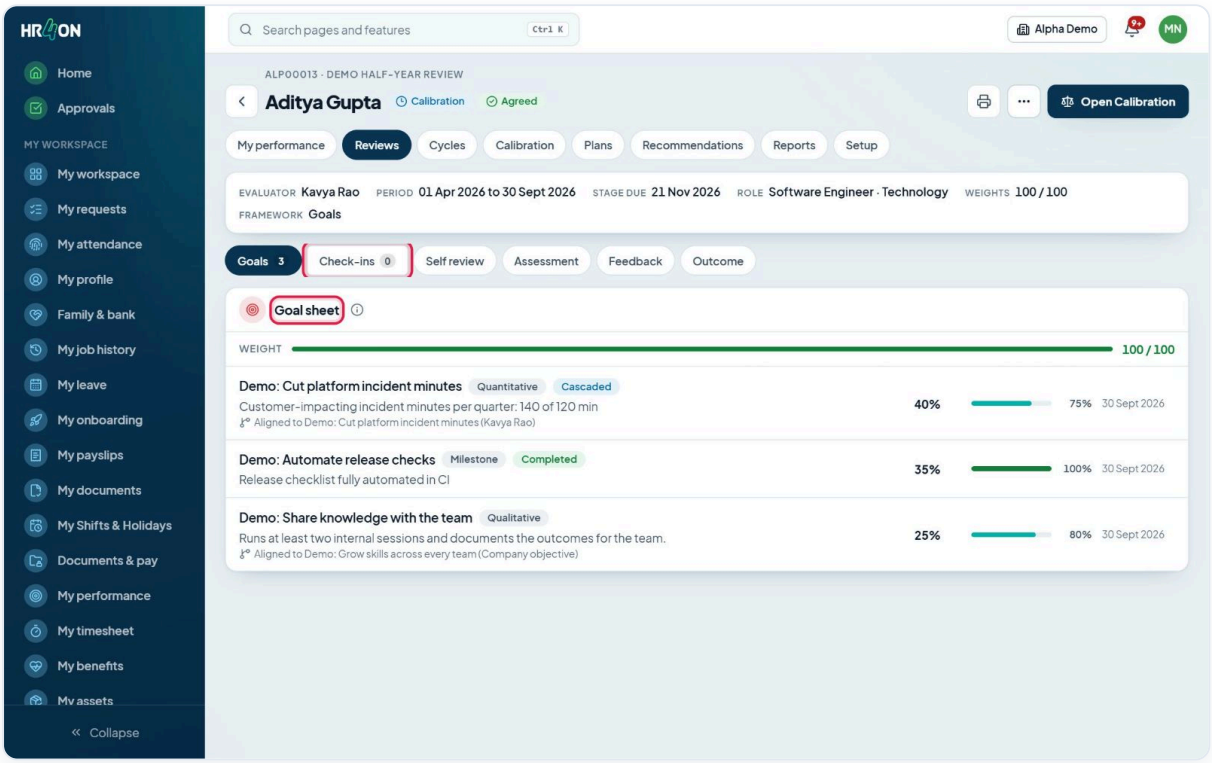
Each review holds the person's goal sheet, check-ins and feedback. HR can open any review in scope to help a manager or chase progress.

WHAT YOU SEE

- Tabs across the review: **Goals**, **Check-ins**, **Self review**, **Assessment**, **Feedback** and **Outcome**.
- **Goal sheet**: goals with weight and progress, **Cascaded** from company objectives where linked.
- **Check-ins**: conversations recorded during the cycle (**Record Check-in**).
- **Feedback**: peer feedback requested with **Request Feedback**.

HOW TO DO IT

1. Open **Reviews** and select a person.
2. Read the goal sheet and check-ins.
3. Use **More actions** to change the evaluator, return goals or exclude the person, each with a reason.

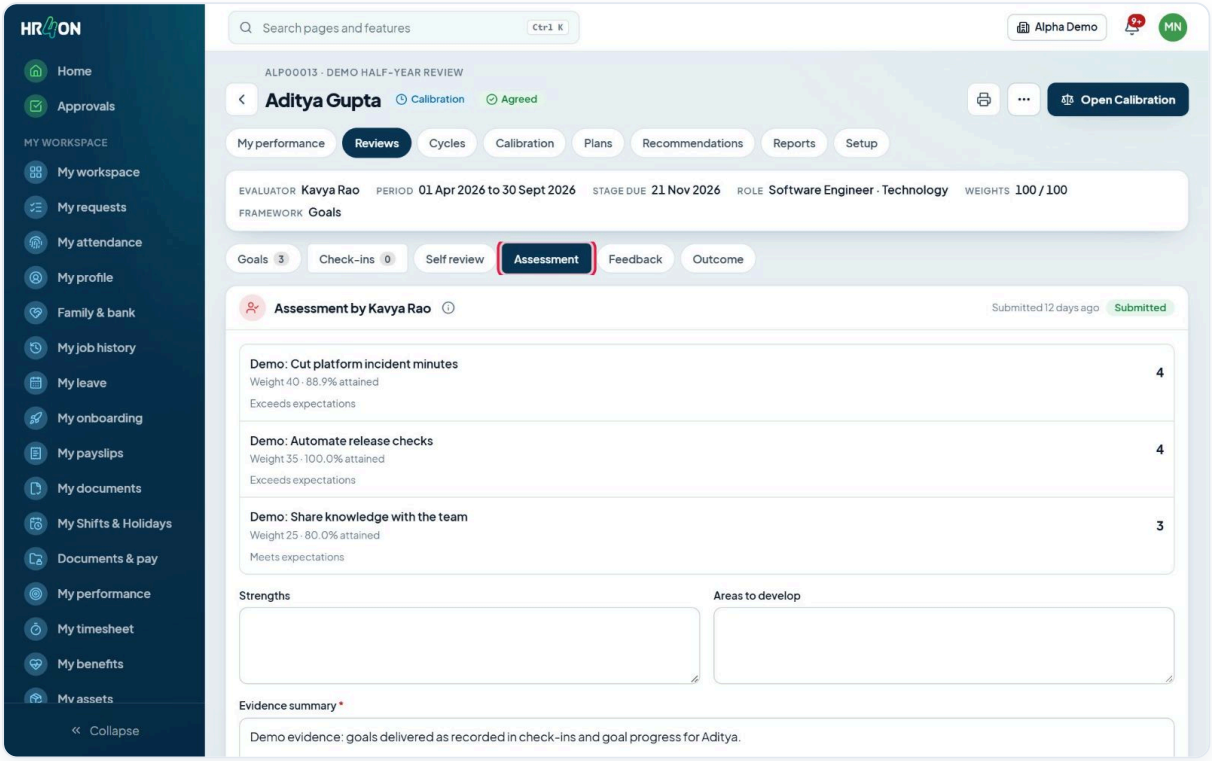


1.6 Manager assessment and outcome

The manager rates each goal, writes strengths and areas to develop and proposes an overall rating. After calibration the outcome is released to the employee.

WHAT YOU SEE

- **Proposed overall rating** and **Rating justification**.
- **Drafting assist** summarises goals and check-ins as a labelled suggestion. It never rates; the manager confirms **The rating is my own judgement, not the assist's suggestion**.
- **Outcome** tab: the approved rating, the employee comment and acknowledgement.
- **Recommend**: propose an increase or promotion from the outcome.



The Assessment tab of a review.

02 Calibration, ratings and outcomes

Calibration compares manager ratings across teams so the same performance gets the same rating. Approved outcomes then lead to development, improvement plans or pay recommendations.

2.1 Calibrate ratings

The calibration page shows the rating distribution against the guide for the cycle and every manager proposal.

WHAT YOU SEE

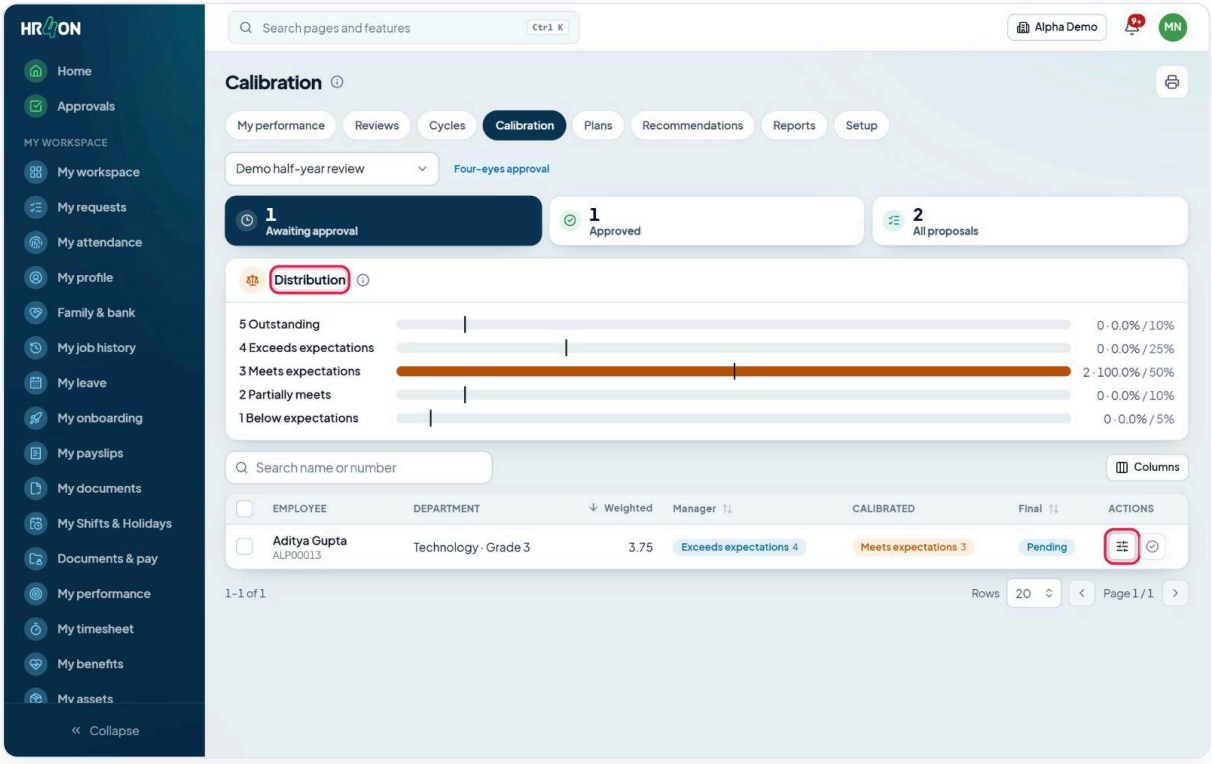
- **Distribution**: the count and share at each level against the guidance (for example 10% Outstanding).
- **Weighted**, **Manager**, **CALIBRATED** and **Final** columns.
- **Four-eyes approval**: an adjustment must be approved by someone other than the person who proposed it.

HOW TO DO IT

1. Open **Calibration** and pick the cycle.
2. Select **Adjust rating** on a row, choose the **Calibrated rating** and write the **Rationale**.
3. Select **Propose Adjustment**. Another calibrator approves it.

GOOD TO KNOW

- Guidance is never a quota unless the cycle enforces the distribution.



2.2 Release outcomes

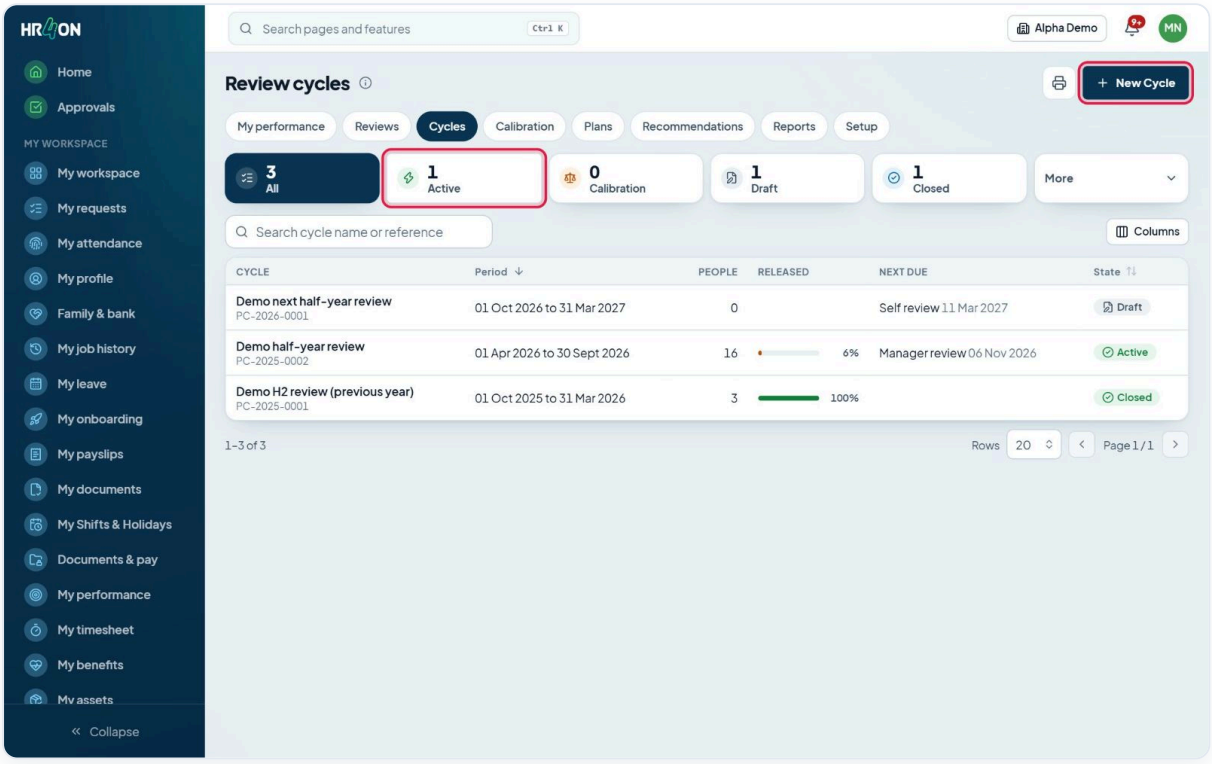
When calibration is approved, release outcomes from the cycle page. Employees see the outcome and acknowledge receipt; they can ask for a discussion or appeal.

HOW TO DO IT

1. Open the cycle.
2. Select **Release** and confirm.
3. Follow acknowledgements and appeals in **Reviews**.

GOOD TO KNOW

- Acknowledging confirms the employee received the outcome. It does not mean they agree.



2.3 Development and improvement plans

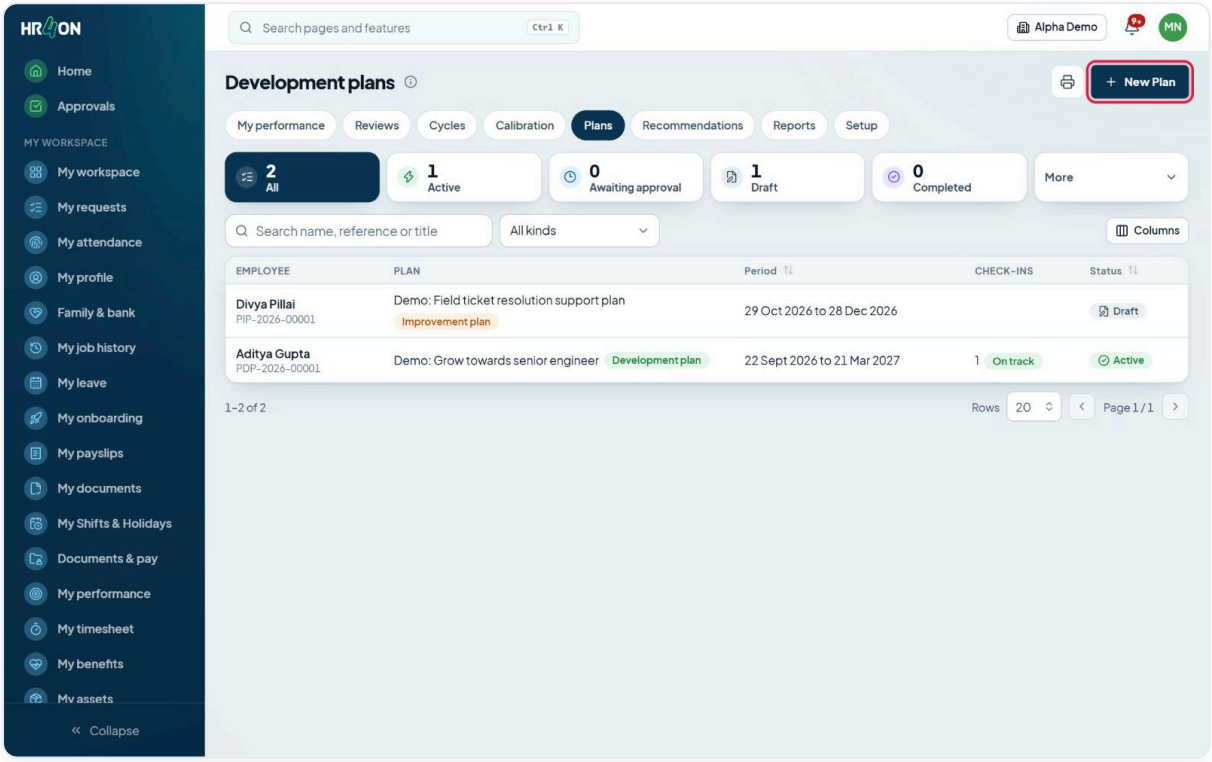
Plans holds development plans and performance improvement plans (PIPs).

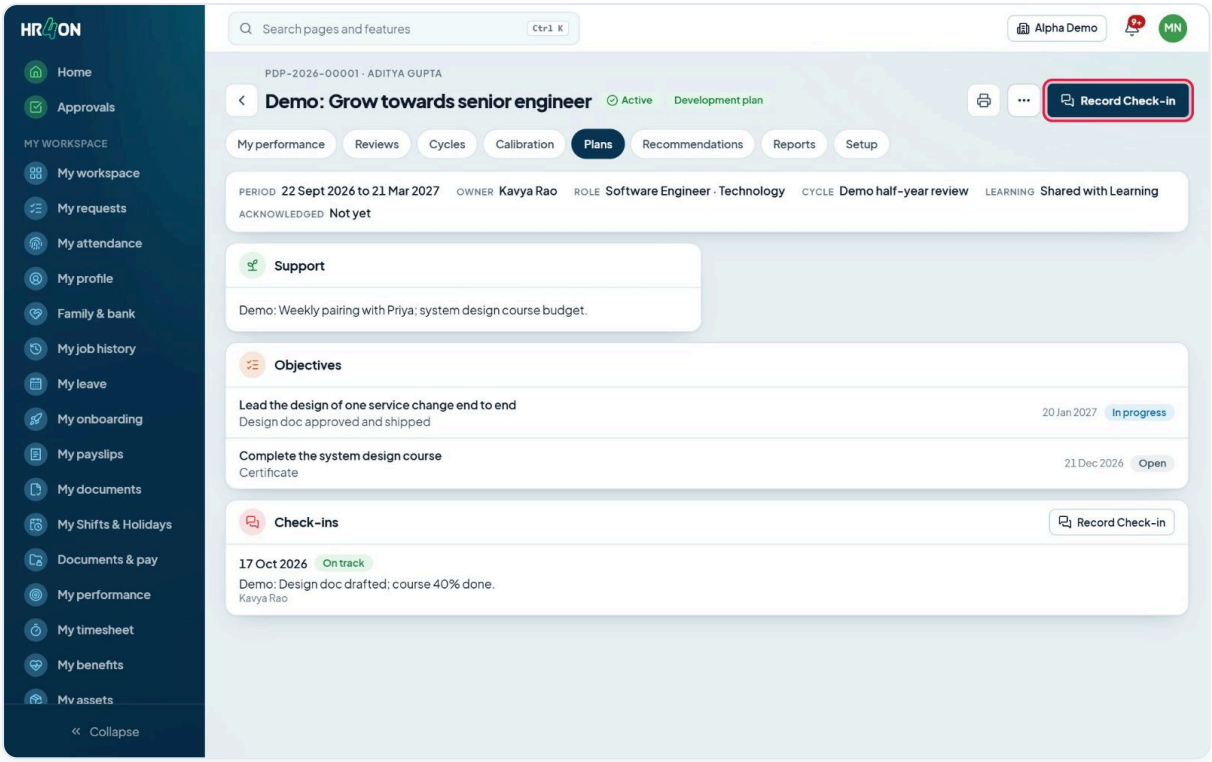
WHAT YOU SEE

- Development plans support growth; improvement plans are approved before they start.
- Each plan has objectives, support, check-ins and an outcome.
- Outcomes are human-reviewed and never trigger an employment decision automatically.

HOW TO DO IT

1. Open **Plans** and select **New Plan**, or open a plan.
2. Use **Record Check-in** during the plan and **Record Outcome** at the end.





A development plan with its check-ins.

2.4 Pay and promotion recommendations

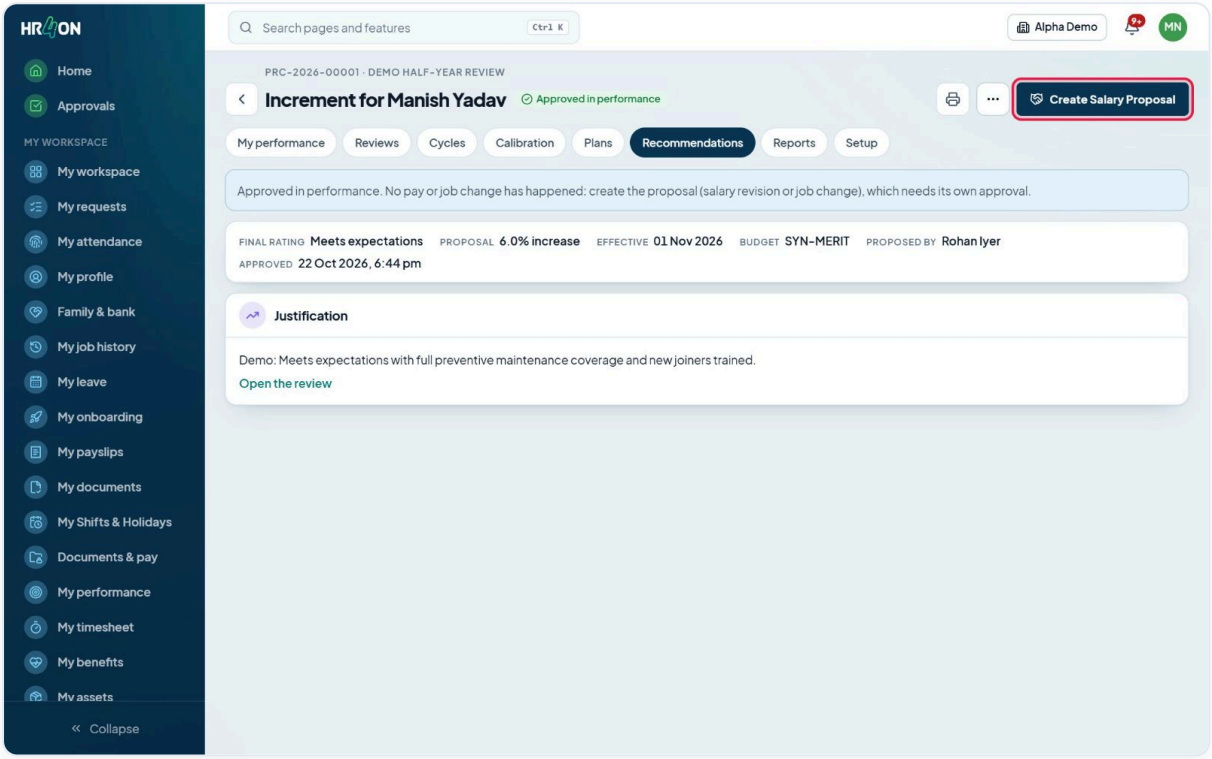
Recommendations come from approved review outcomes: an increase, a promotion or both.

WHAT YOU SEE

- Statuses: **Awaiting approval**, **To hand off**, **Proposal created**, **Applied**.
- Pay changes become salary revision proposals in Compensation; promotions become employment changes, each with its own approval.

HOW TO DO IT

1. Open **Recommendations** and select one.
2. Select **Create Salary Proposal** (or the promotion equivalent) to hand it to Compensation or Employment changes.



2.5 Performance reports

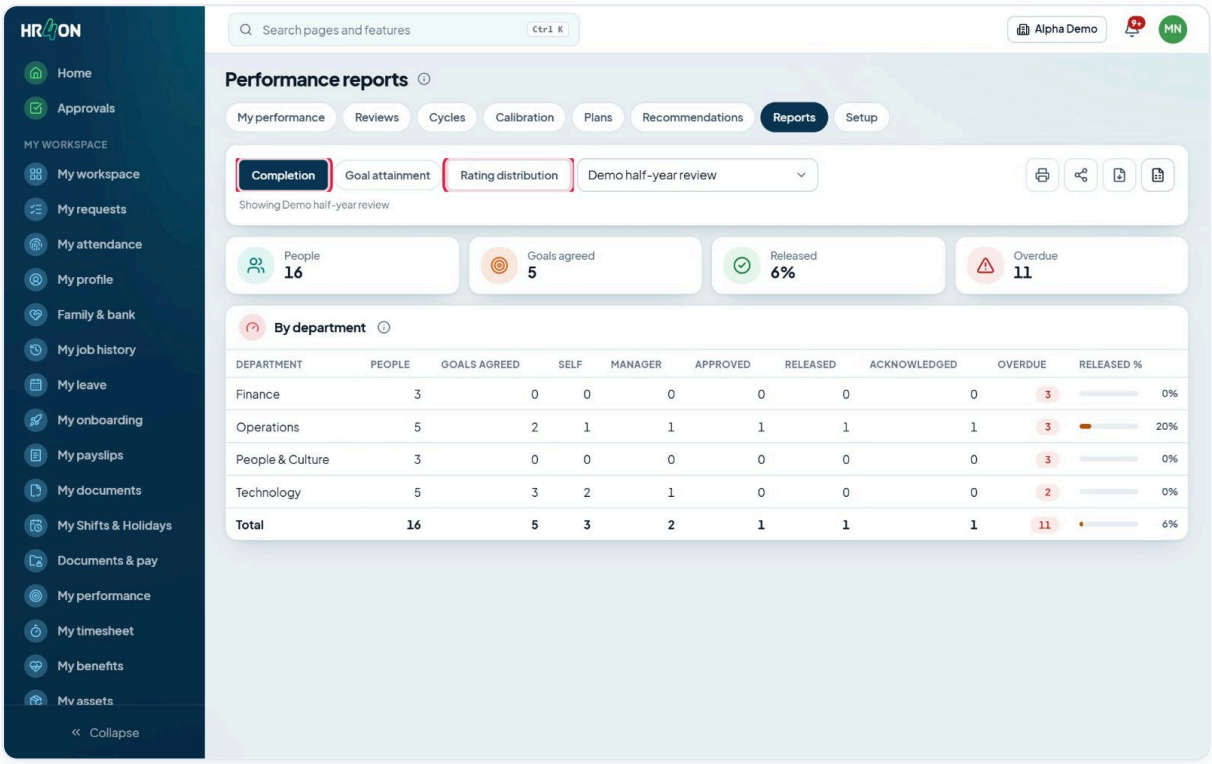
Reports show progress and results for a cycle.

WHAT YOU SEE

- **Completion**: goals agreed, self and manager reviews, approved, released and acknowledged, by department.
- **Goal attainment**: progress against goals.
- **Rating distribution**: final ratings by level.

HOW TO DO IT

1. Open **Reports**, pick the cycle and the tab.
2. Use **Download CSV** or **Download PDF**.



03 Learning

Learning under **Grow** is where you publish courses, assign required training, run sessions, check evidence and keep certificates up to date.

3.1 Follow learning assignments

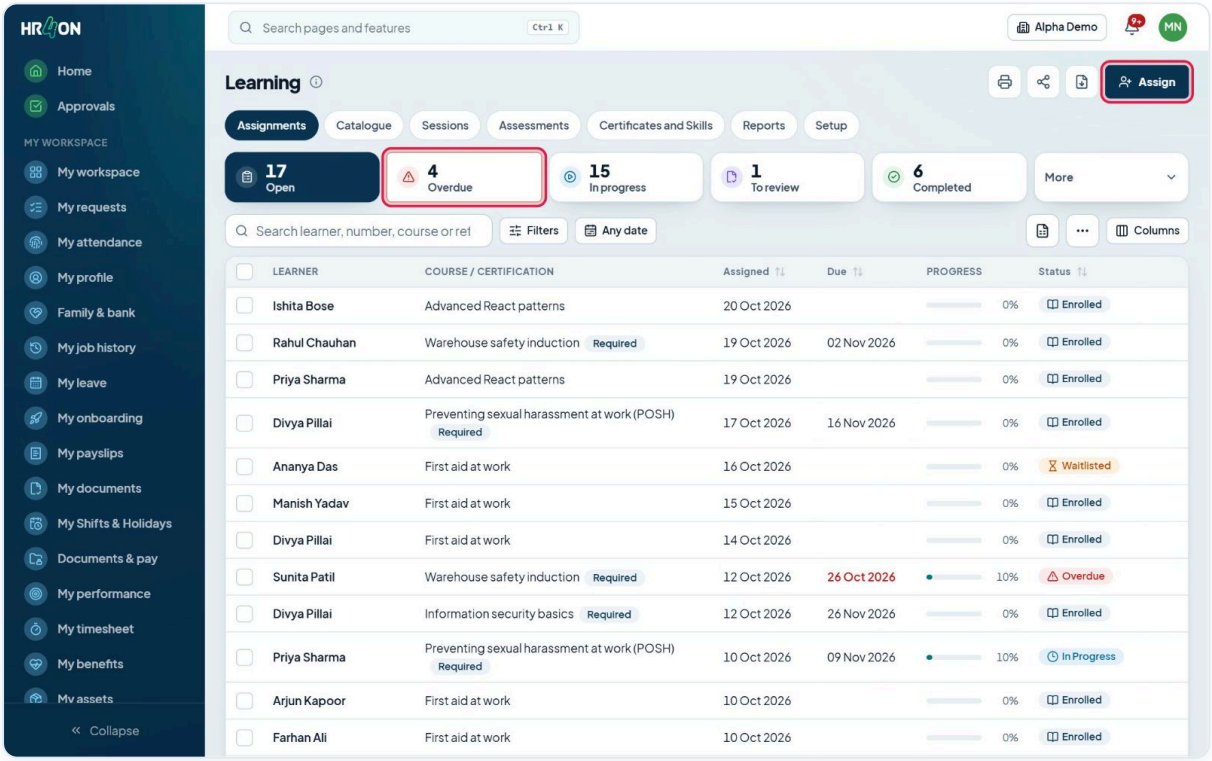
Assignments lists every learner and course in your access: required training, nominations, self requests and completions.

WHAT YOU SEE

- **Open**, **Overdue**, **In progress**, **To review** and **Completed** tiles.
- **Required** marks compliance training such as POSH or information security.
- **PROGRESS** and **Status** (Enrolled, Waitlisted, Completed and so on).

HOW TO DO IT

1. Open **Learning**.
2. Select **Overdue** to chase late training.
3. Select a row to open the enrolment.
4. Use **Export** or **Import** for many rows at once.



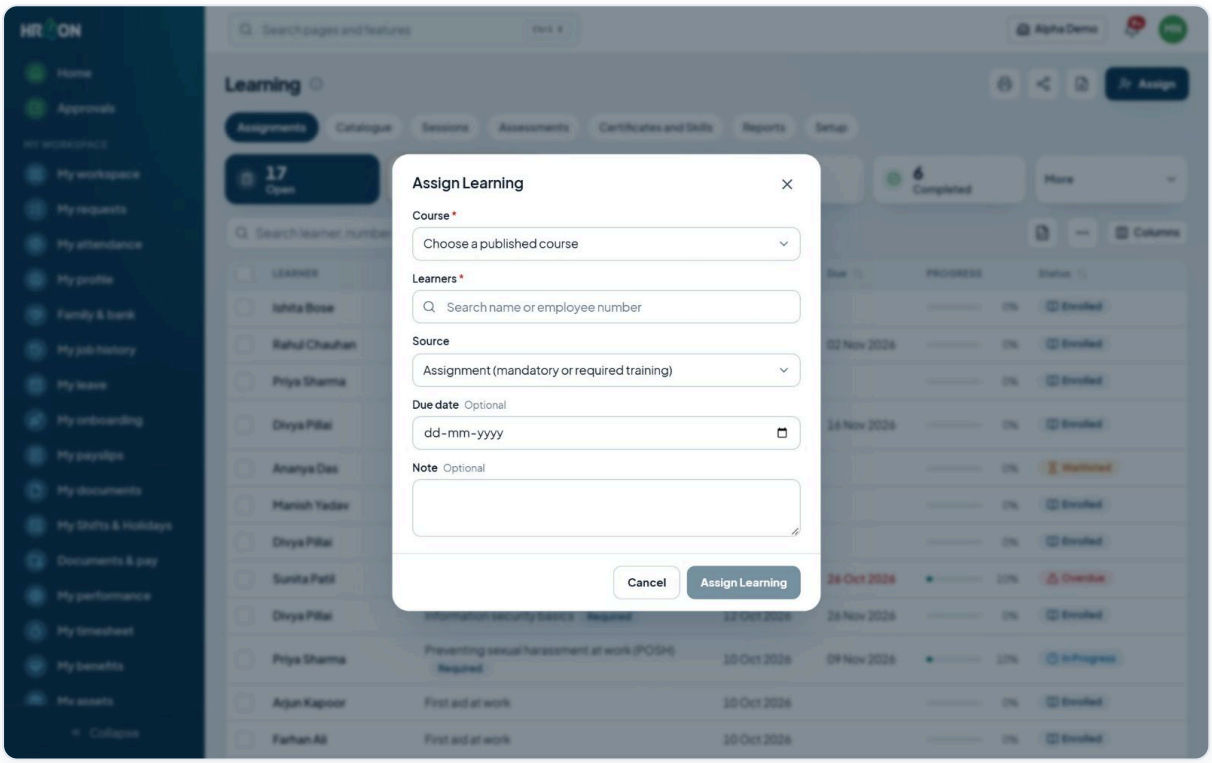
3.2 Assign training

Assign a course to people or groups, with a due date.

HOW TO DO IT

1. Select **Assign**.
2. In **Assign Learning**, choose the **Course** and search for the **Learners**.
3. Choose the **Source** (for example mandatory or required training), set the **Due date** and add a **Note** if you want.
4. Select **Assign Learning**. Learners are notified.

> **TIP**
> - A course marked **Assign automatically to new joiners** is assigned at onboarding without any action from you.



3.3 Manage the course catalogue

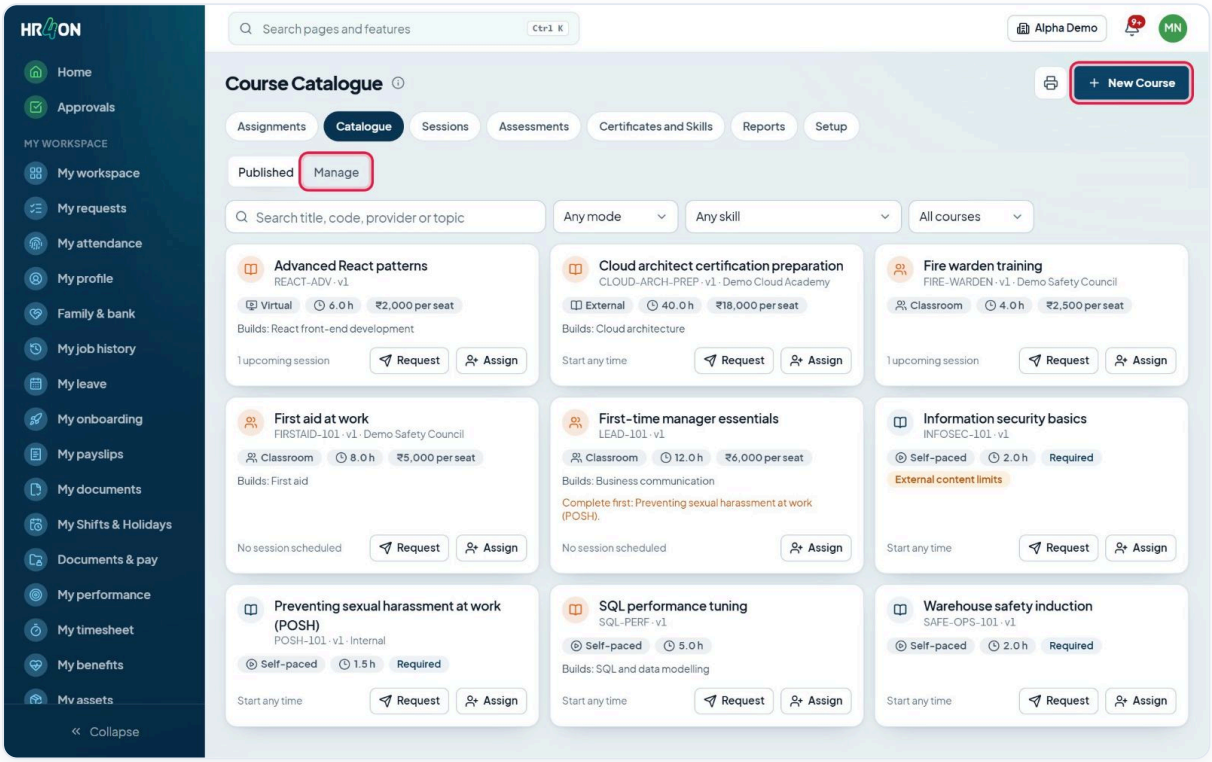
Catalogue shows published courses to everyone; **Manage** shows drafts and retired courses too.

WHAT YOU SEE

- Each course shows its mode (**Classroom**, **Virtual**, **Self-paced**, **External**), hours, cost per seat, the skill it builds and upcoming sessions.
- Filter by mode, skill or **Required**.

HOW TO DO IT

1. Open **Catalogue**.
2. Select **New Course** to create one, or open a course.



3.4 Create or edit a course

The course editor covers everything about a course, from content to completion rules.

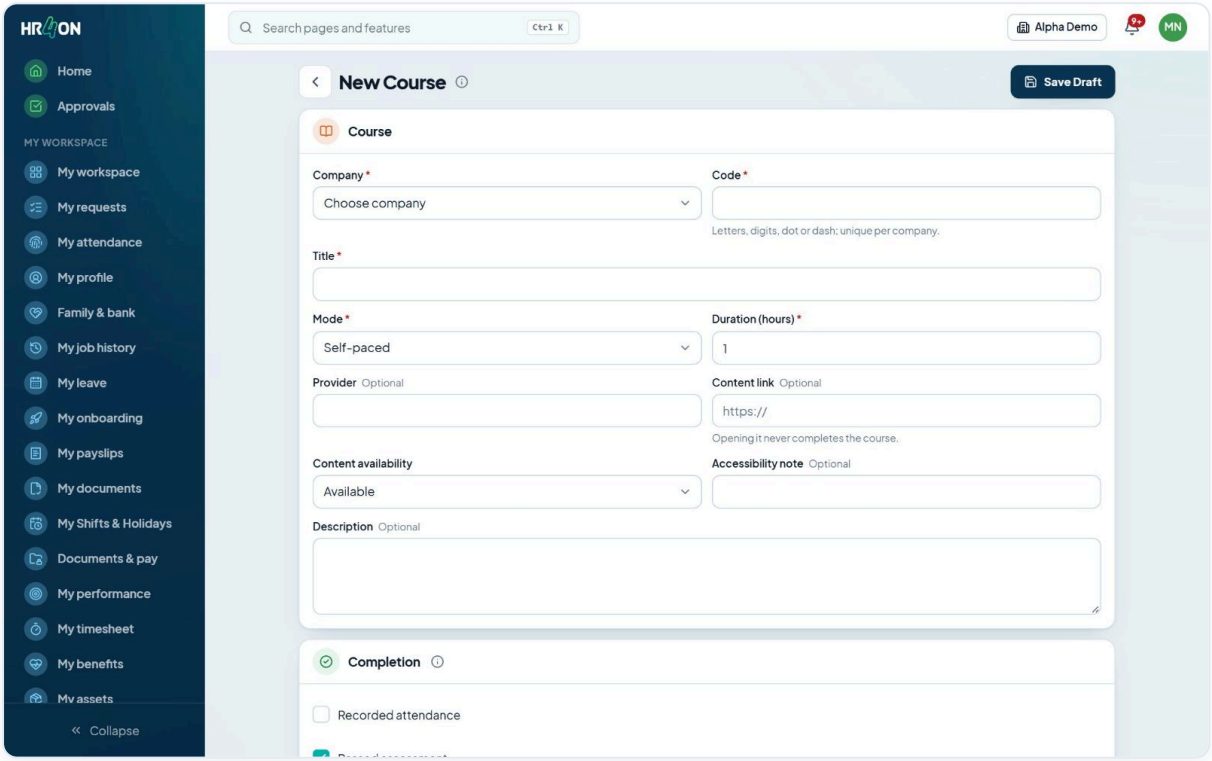
WHAT YOU SEE

- **Course**: Title, Code, Mode, Provider, Duration (hours), Level, Content link.
- **Completion**: Recorded attendance with Minimum attendance %, Passed assessment with Pass mark % and Attempts allowed, or Accepted completion evidence.
- **Certificate and skills**: Issues certificate, Validity (months) and skills recorded as verified on completion.
- **Eligibility**, **Cost and assignment**: prerequisites, eligible grades, fees, Required (mandatory) learning, Due within (days).

HOW TO DO IT

1. Fill in the form and select Save Draft.
2. Open the course and select Publish.

> **GOOD TO KNOW**
> - Published versions never change. Enrolments and certificates keep the version they started on.



3.5 Open a course

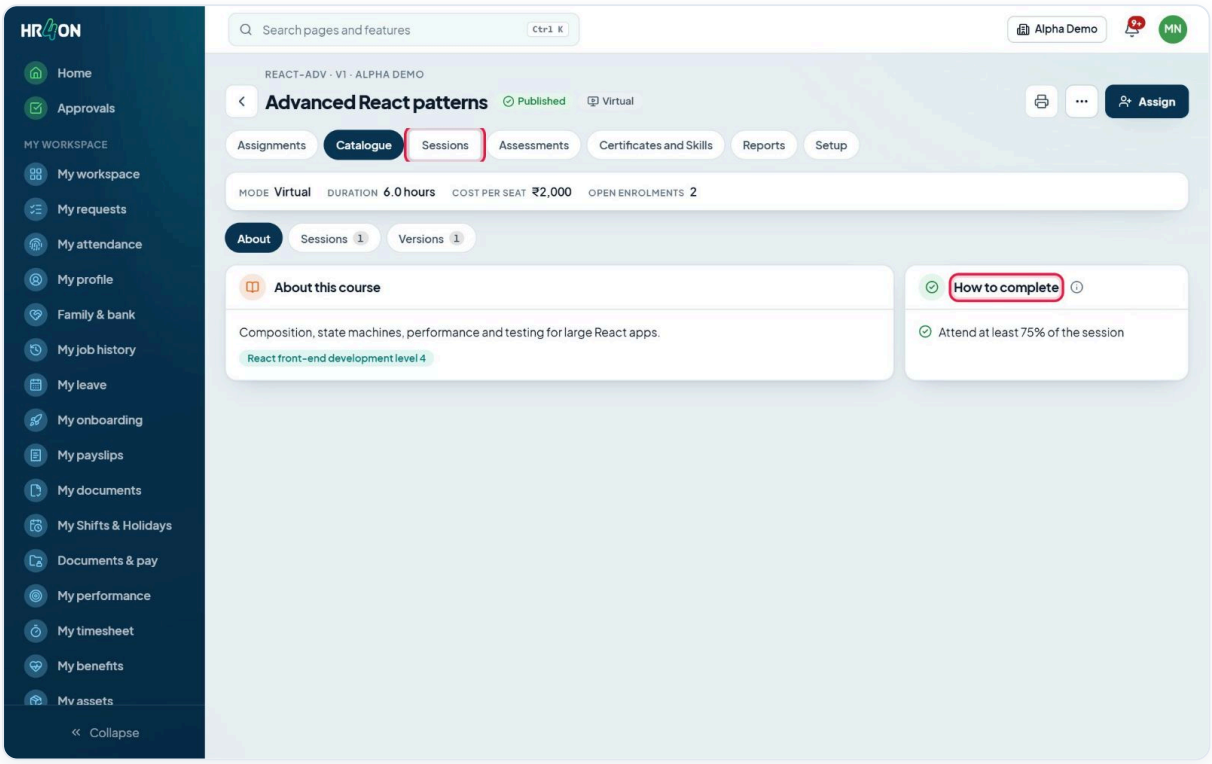
The course page shows what the course is about and how to complete it, with its sessions and versions on separate tabs.

WHAT YOU SEE

- **About**: the description, skills it builds and **How to complete**.
- **Sessions**: upcoming sessions.
- **Versions**: every published version.

HOW TO DO IT

1. Open a course.
2. Use **Assign** to assign it, or **More actions** to edit (which starts a new version), schedule a session or retire it.

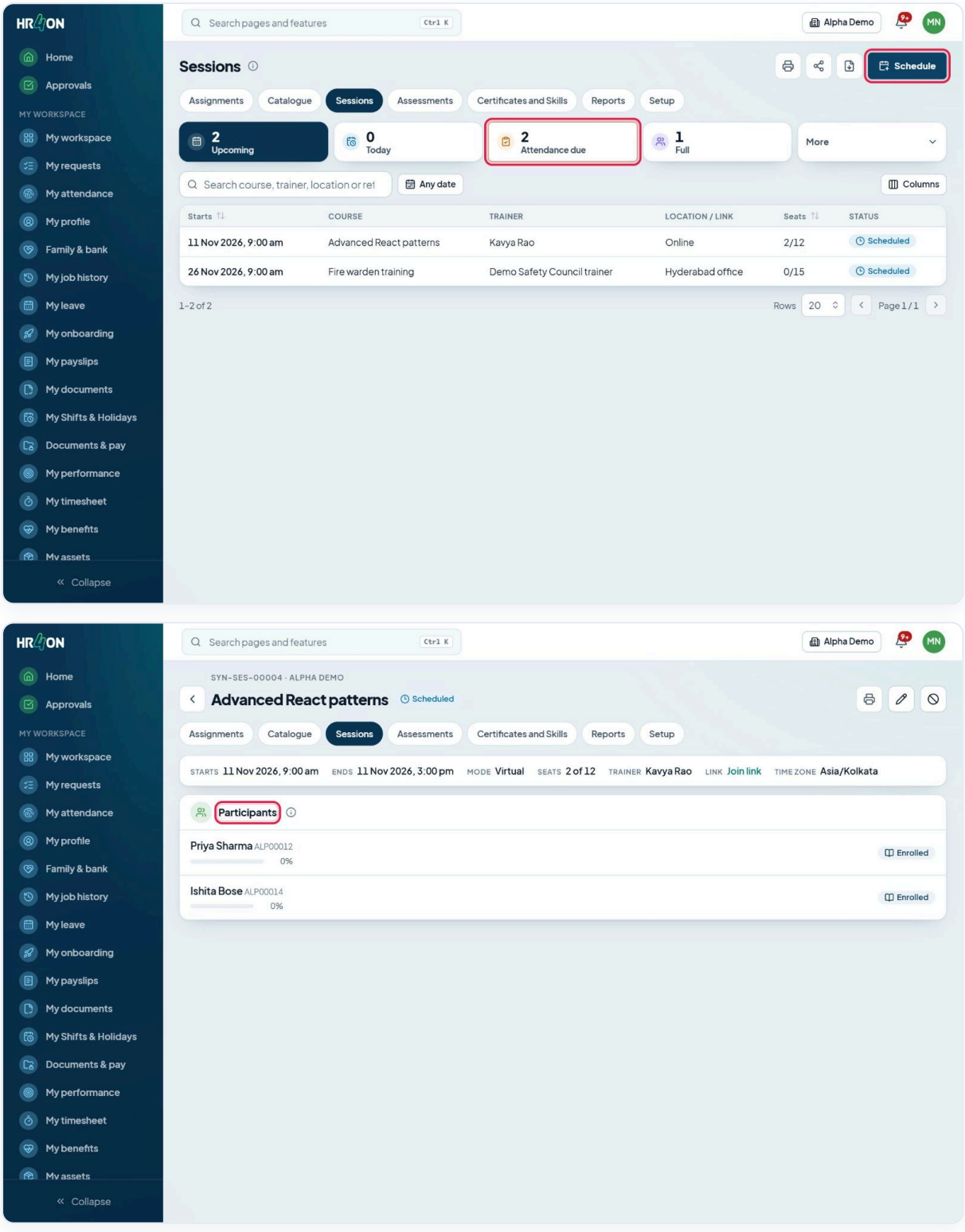


3.6 Run sessions and record attendance

Sessions lists scheduled classroom and virtual sessions. Seats are given in approval order; a full session has a waitlist.

HOW TO DO IT

1. Open **Sessions** and select **Schedule** to add one: course, date, times, location or meeting link, trainer and capacity.
2. After the session, open it and mark each participant **Present**, **Partial**, **Absent** or **Excused**.
3. Select **Record Attendance**. Present learners complete the course.



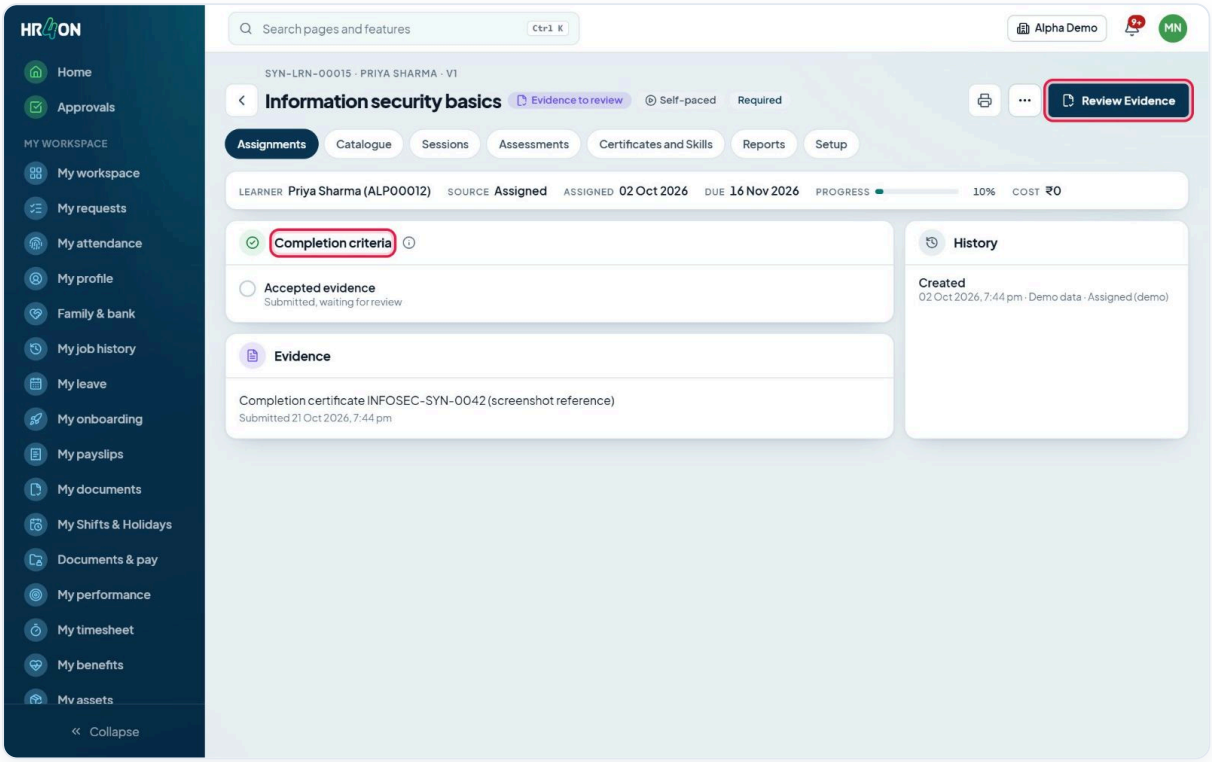
A session with its participants.

3.7 Review evidence and assessments

Assessments collects work waiting for you: evidence to review and failed attempts that may need a retake.

HOW TO DO IT

1. Open **Assessments**, then a learner.
2. Read the **Completion criteria** and the **Evidence**, then select **Review Evidence** and choose **Accept** or **Return** with a note.
3. For assessments, use **Record Assessment Result** or **Allow Retake**.



3.8 Certificates and compliance

Certificates and Skills tracks certificates, verifies skills and checks whether people are qualified for critical work.

WHAT YOU SEE

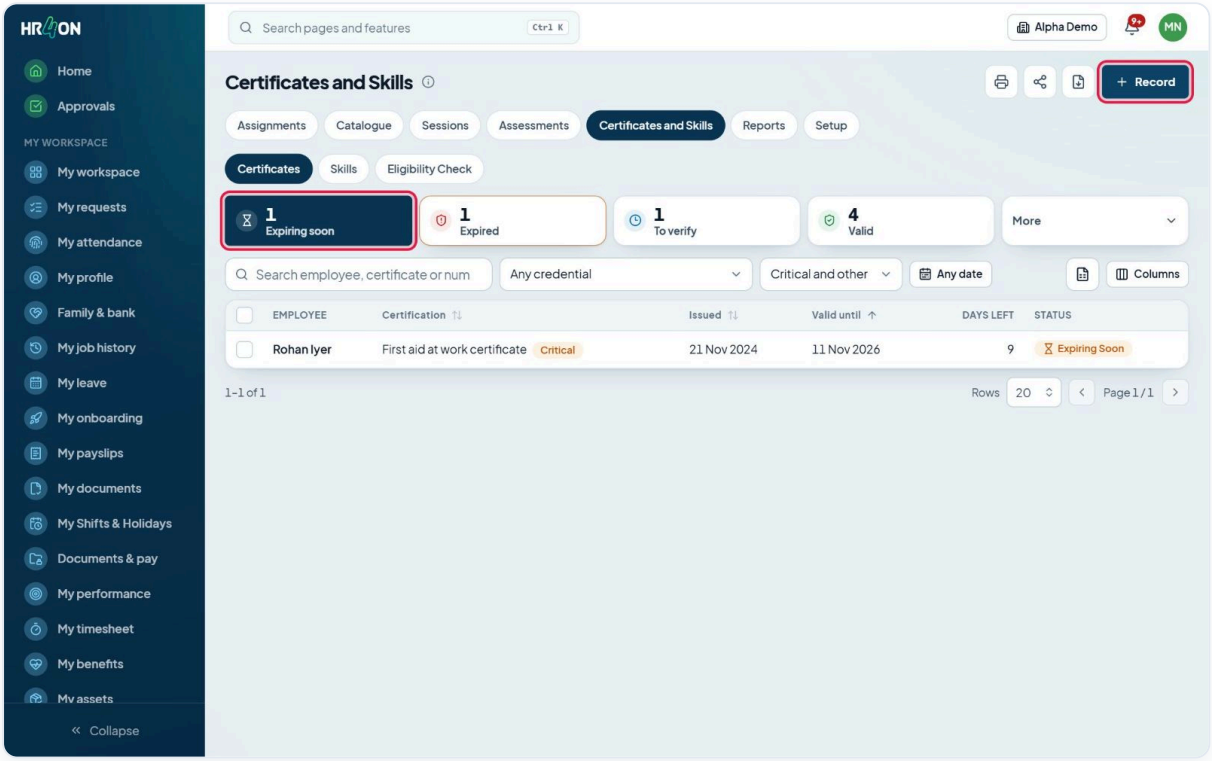
- **Certificates**: **Expiring soon**, **Expired**, **To verify** and **Valid**. **Critical** certificates restrict deployment when they expire.
- **Skills**: skill claims and verifications.
- **Eligibility Check**: checks a person against the critical qualifications for a work or roster code.

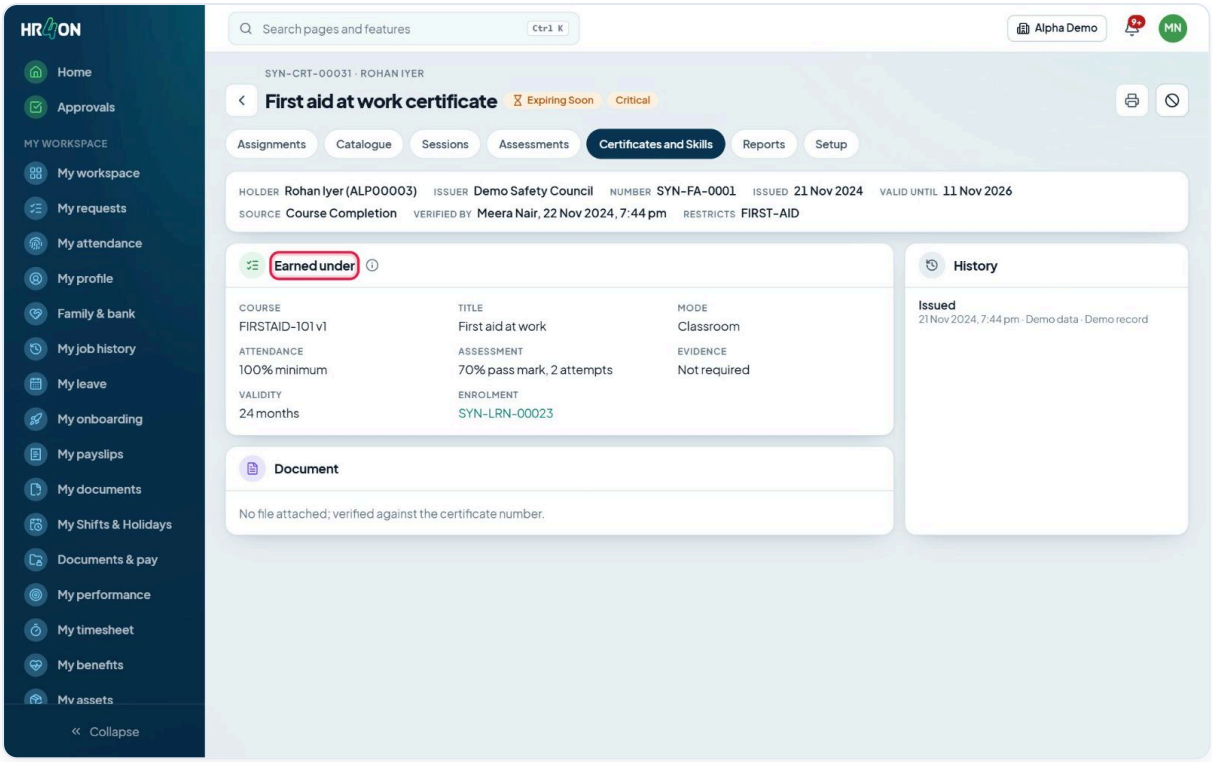
HOW TO DO IT

1. Open **Certificates and Skills**.
2. Select **To verify** and open a certificate to **Verify** or reject it.
3. Use **Record** to add a certificate earned elsewhere.

GOOD TO KNOW

- A certificate is verified by someone other than the holder or the person who recorded it.





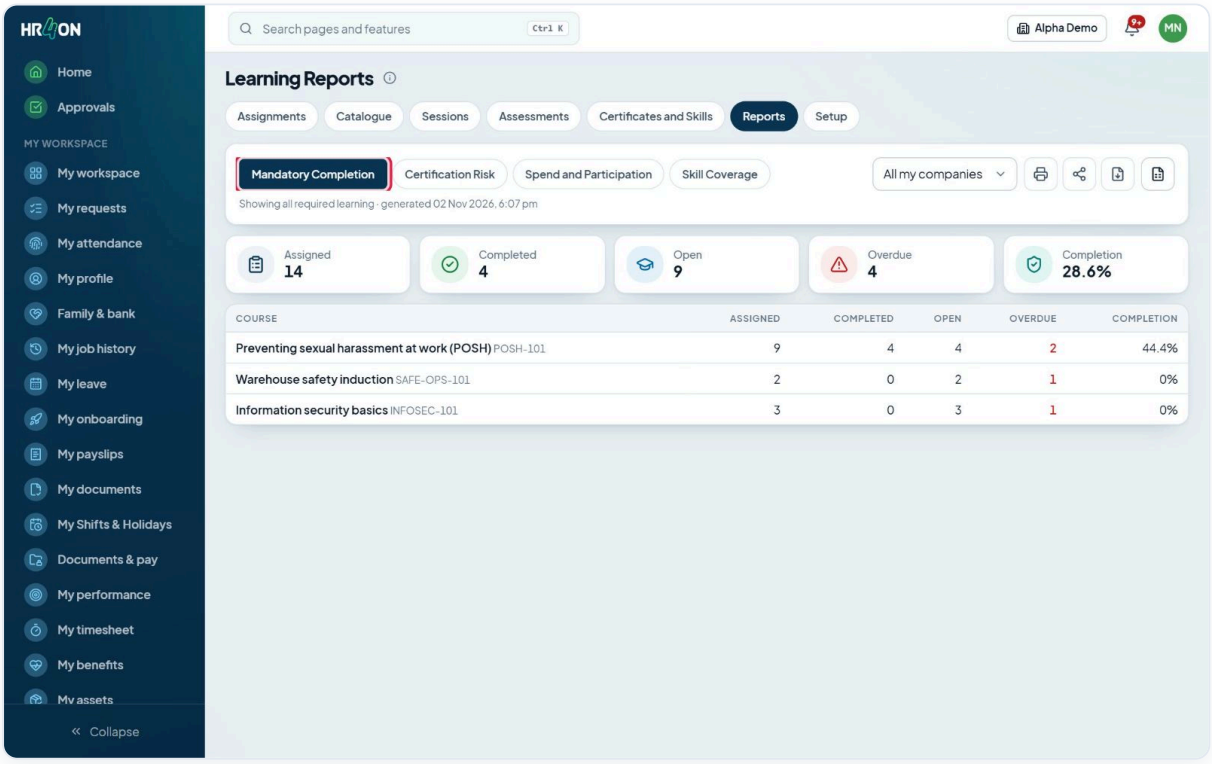
A certificate that expires soon.

3.9 Learning reports and setup

Reports show compliance and spend; setup holds the skills taxonomy, credential types and budgets.

WHAT YOU SEE

- **Mandatory Completion**: assigned, completed, open and overdue per required course.
- **Certification Risk**, **Spend and Participation** and **Skill Coverage**.
- Setup: **Skills**, **Credential Types** and **Budgets**.



04 Workforce planning

Workforce planning connects approved positions, actual employees and future plans, so hiring always matches the approved headcount and budget.

4.1 Read the workforce overview

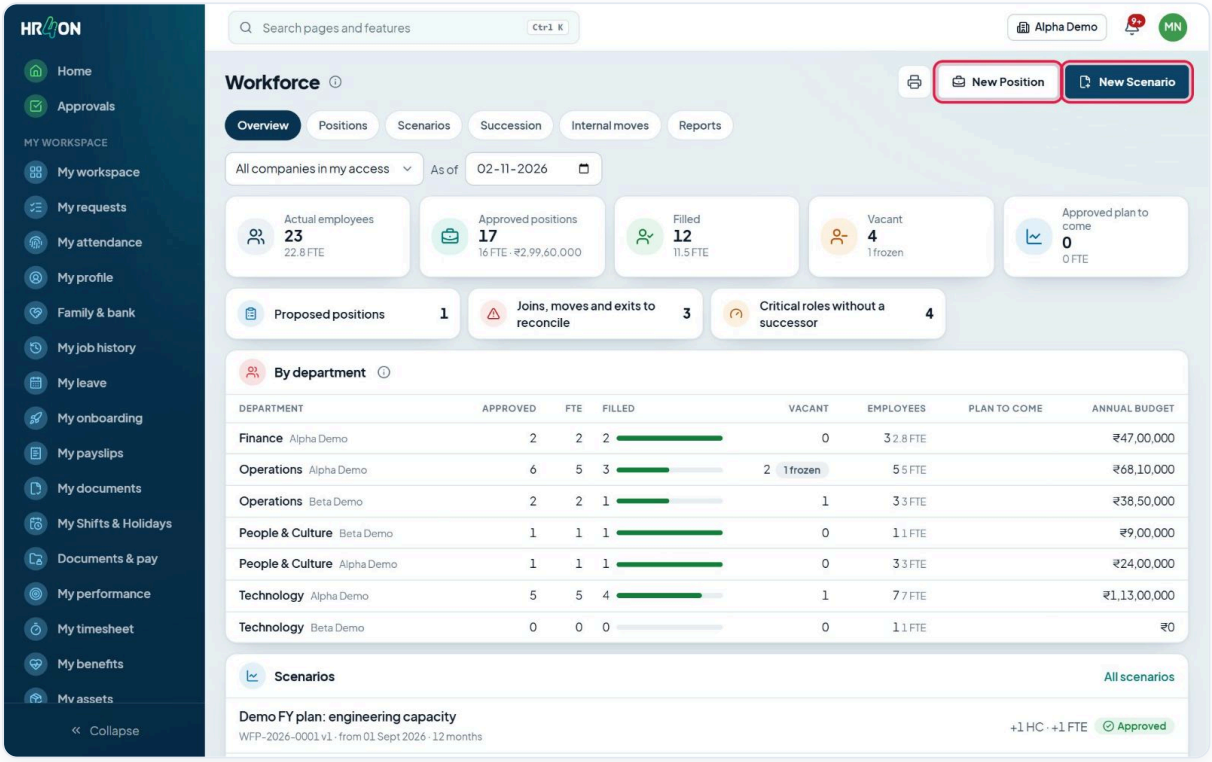
The overview compares actual employees with approved positions and approved plan changes still to come.

WHAT YOU SEE

- **Actual employees**, **Approved positions**, **Filled**, **Vacant** and **Approved plan to come**, in headcount and FTE.
- Alerts: **Proposed positions**, **Joins, moves and exits to reconcile** and **Critical roles without a successor**.
- **By department**: approved, filled, vacant and annual budget.

HOW TO DO IT

1. Open **Workforce planning**.
2. Change the company or **As of** date if you need to.
3. Select a figure to open the matching list.



4.2 Manage positions

A position is an approved seat with planned FTE and a cost estimate. People are placed in positions.

WHAT YOU SEE

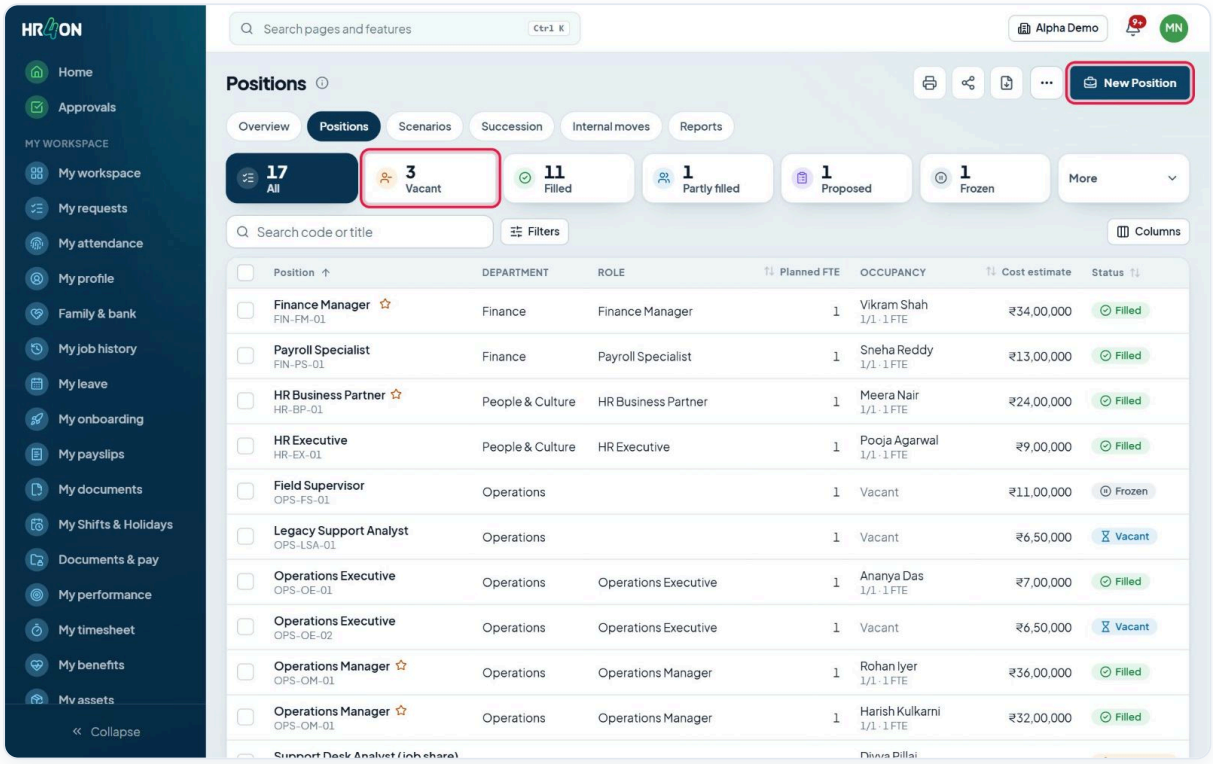
- Statuses: **Vacant**, **Filled**, **Partly filled**, **Proposed**, **Frozen**.
- Each change is a dated version, so historical reports keep the status a position had then.

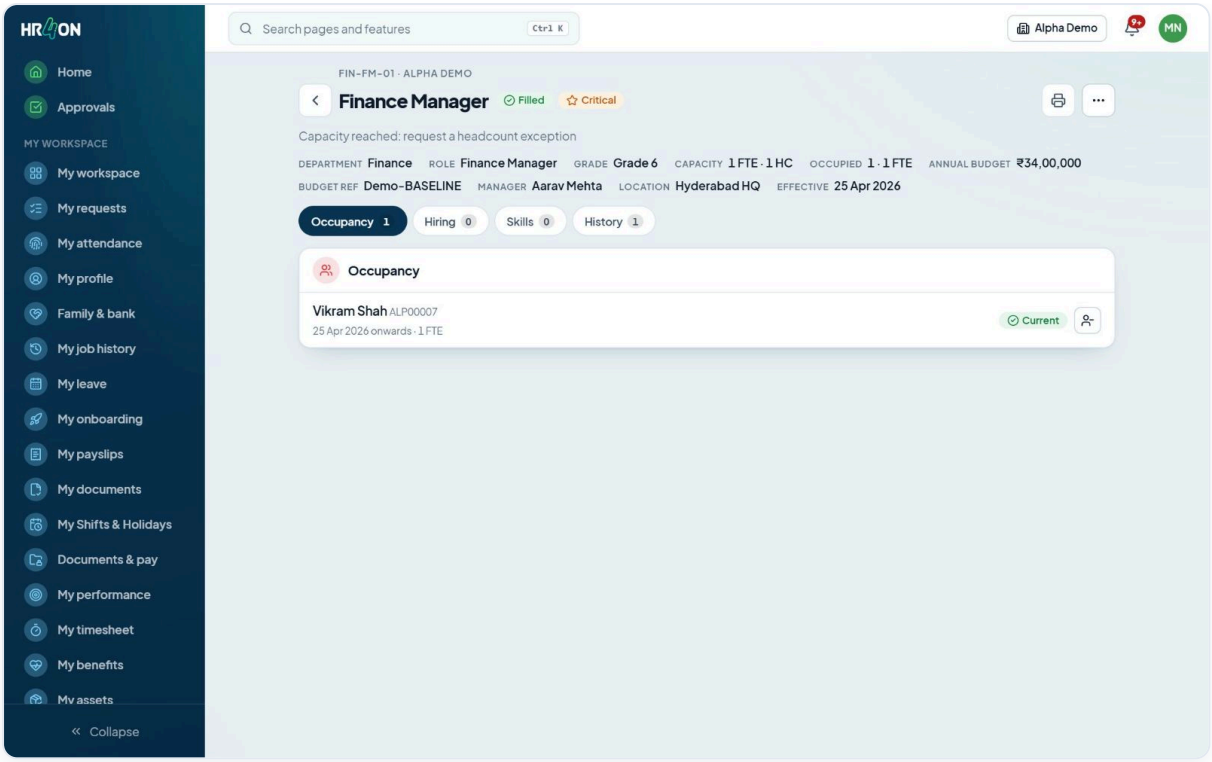
HOW TO DO IT

1. Open **Positions** and select **New Position**, or open a position. Its tabs show **Occupancy**, **Hiring**, **Skills** and **History**.
2. On a vacant position use **Raise Requisition** to start hiring, **Fill Position** to place someone, or **Post Opportunity** to offer it internally.
3. Tick **Critical for succession** for key roles.

GOOD TO KNOW

- Hiring beyond approved capacity needs an approved headcount exception.





A position with its occupancy and versions.

4.3 Build a headcount scenario

A scenario is a headcount plan: new positions, backfills, resizes, freezes or abolitions by period, with their cost.

WHAT YOU SEE

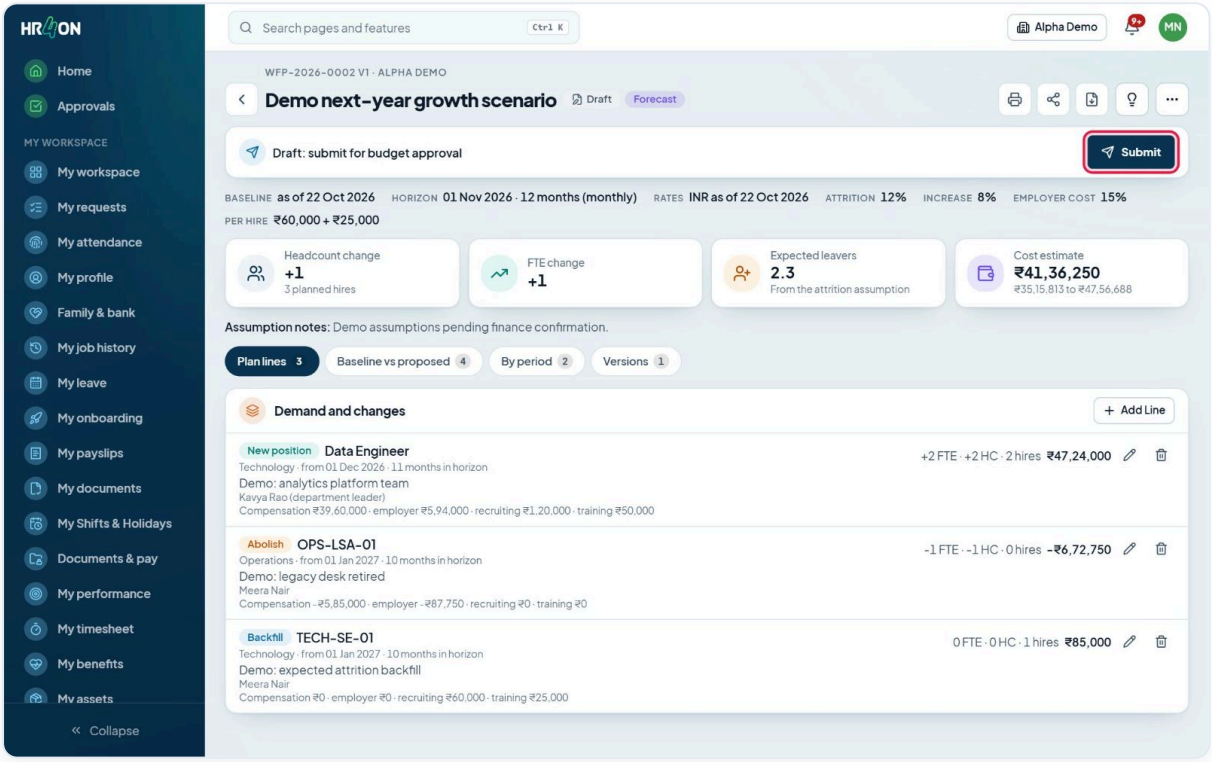
- **Baseline versus proposed**: approved positions on the baseline date against the plan.
- **Demand and changes**: each line with department, position, headcount and FTE change and cost (**Add Line**, **Add Demand**).
- **Assumptions**: annual cost per FTE, expected leavers and notes.
- **Compare versions** and **Explain this plan** summarise what changed and why.
- Tabs: **Plan lines**, **Baseline vs proposed**, **By period** and **Versions**.

HOW TO DO IT

1. Open **Scenarios** and select **New Scenario**, or open a draft.
2. Add lines and assumptions.
3. Select **Submit** to send it for budget approval.

GOOD TO KNOW

- Approved versions are immutable. A new version starts from the latest one with a fresh baseline.

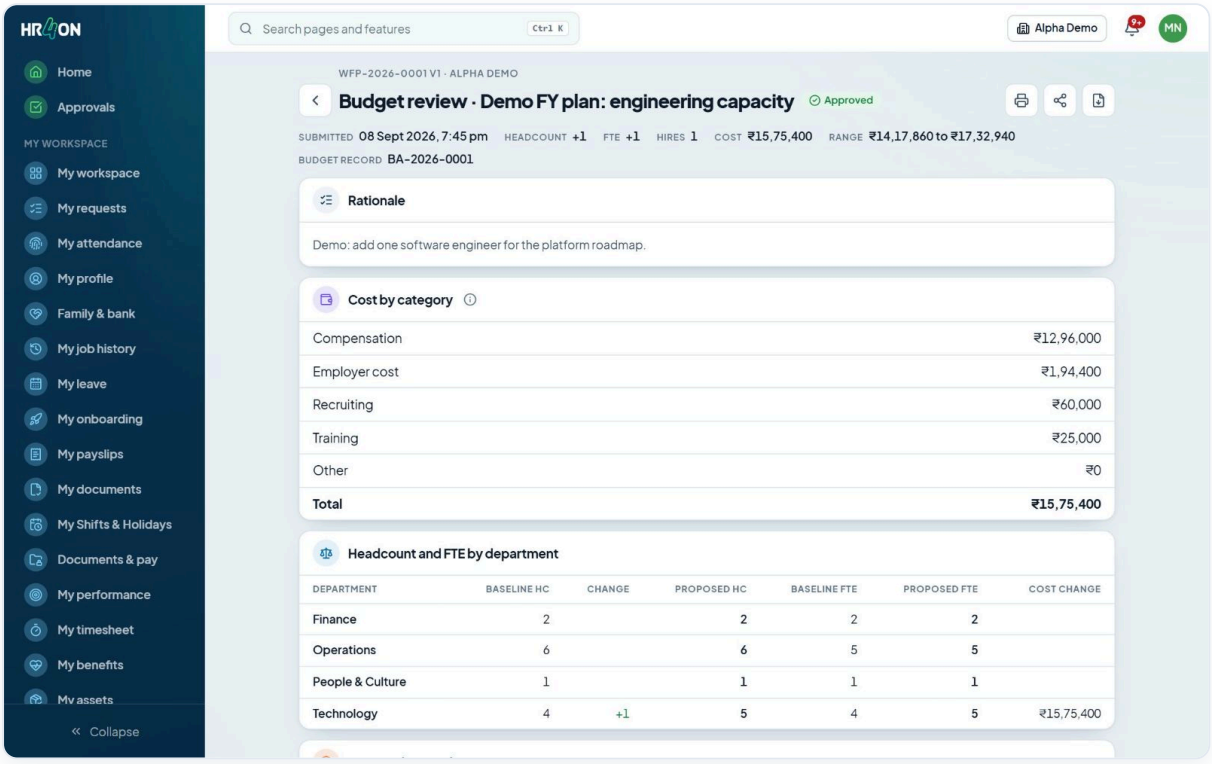


4.4 Review a budget

Budget reviewers see the scenario's headcount, FTE and cost by department and category, with the rationale for each line.

HOW TO DO IT

1. Open the scenario and select **Review Budget**.
2. Check the figures and assumptions.
3. Select **Approve** or **Return** with a comment.



4.5 Plan succession

Succession lists critical roles, their successors and readiness. It is restricted to talent reviewers and every view is audited.

WHAT YOU SEE

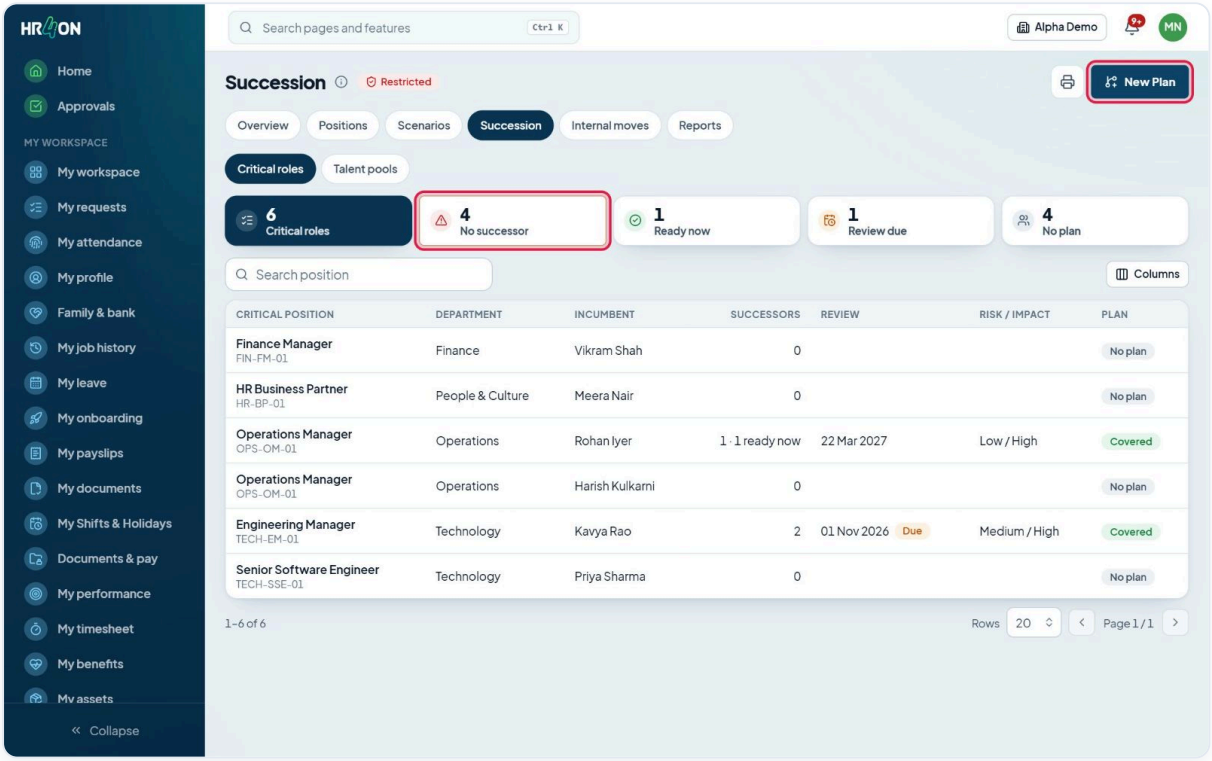
- **No successor**, **Ready now**, **Review due** and **No plan** tiles.
- **RISK / IMPACT**: risk of losing the person and impact of the loss.
- **Talent pools**: named groups of people being developed.

HOW TO DO IT

1. Open **Succession** and select a critical role, or **New Plan**.
2. Use **Add Candidate** and record readiness, then **Assign development** actions.
3. Select **Complete Review** to save a snapshot of the candidates.

GOOD TO KNOW

- Readiness is a recorded human judgement; performance and skills are shown as evidence and never decide anything automatically.

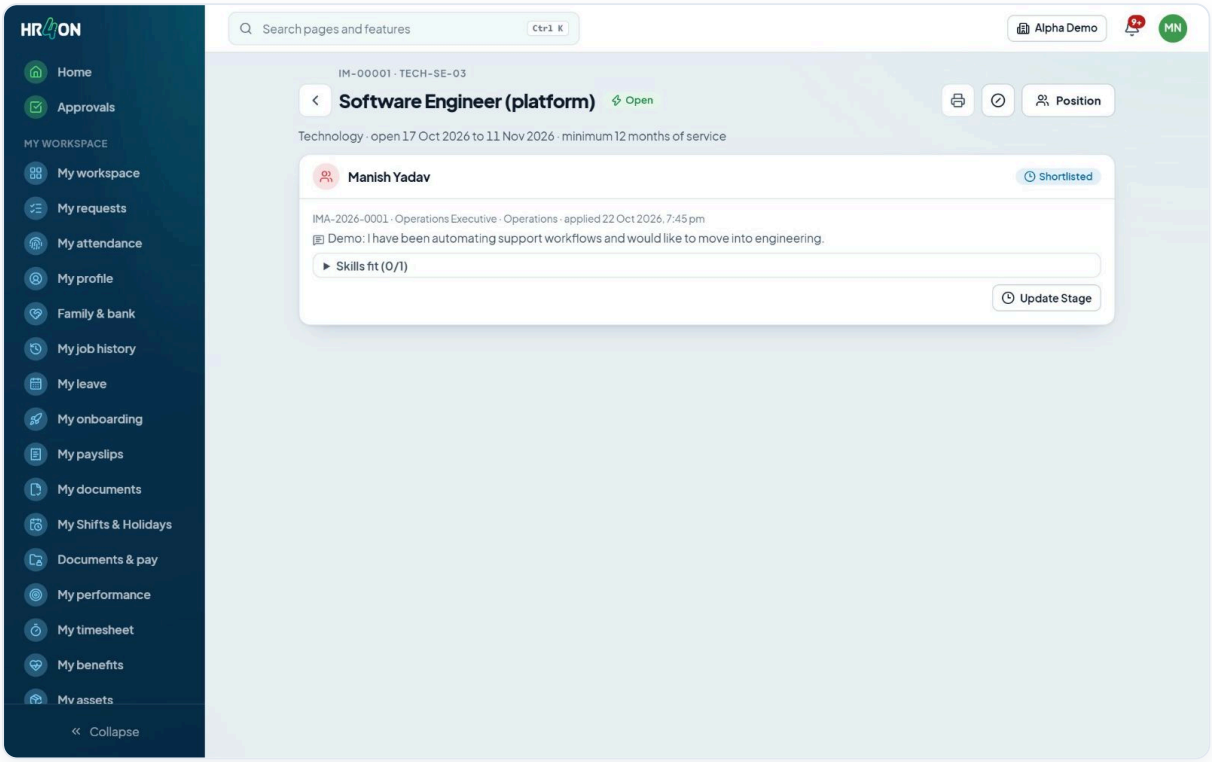


4.6 Offer internal moves

Internal moves lists vacancies offered to employees and their applications. Employees find them under **Internal opportunities**.

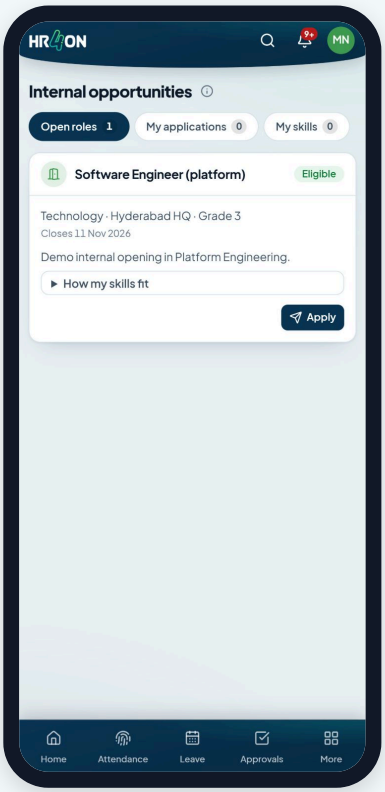
HOW TO DO IT

1. Offer a vacant position from its position page with **Post Opportunity**, or select **Offer a Vacancy**.
2. Open the opportunity to see applications and use **Update Stage**.
3. Select **Propose Move** for the chosen person. The move goes to Employment changes for approval.



ON YOUR PHONE

What employees see in Internal opportunities on a phone.

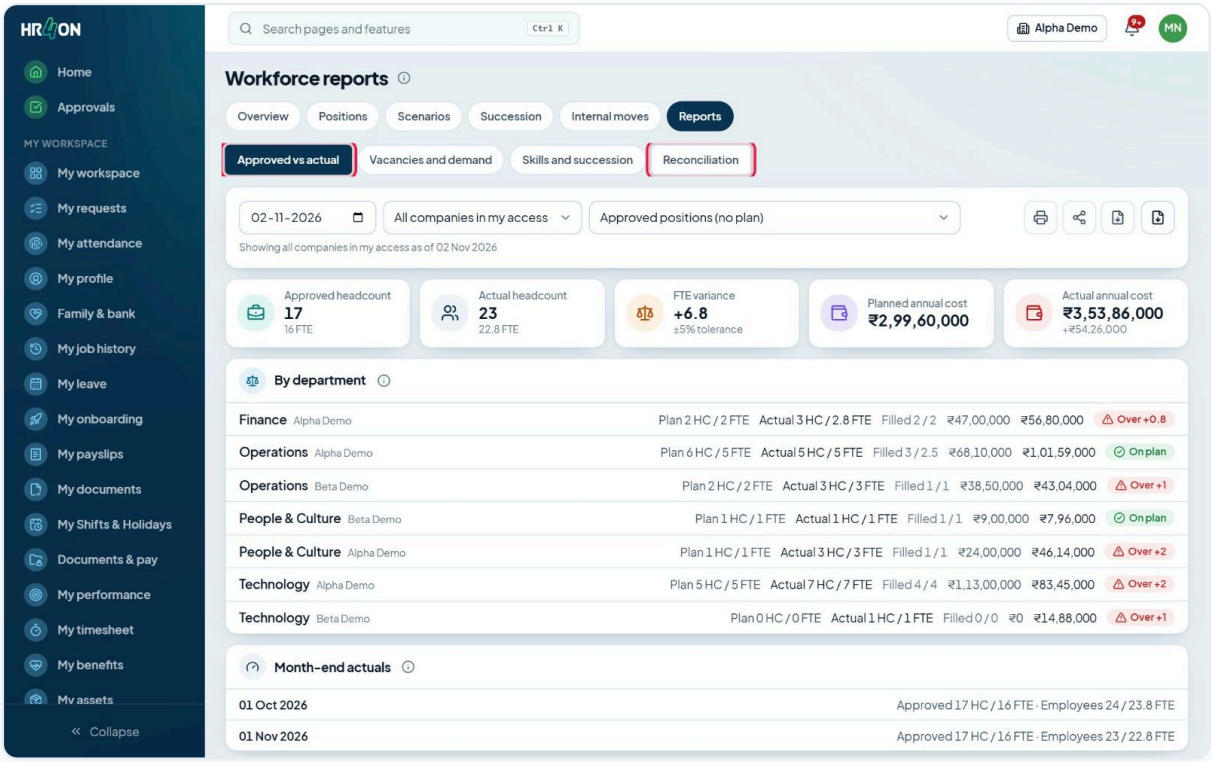


4.7 Workforce reports

Reports compare plan with actuals.

WHAT YOU SEE

- **Approved vs actual**: headcount, FTE and cost by department against plan.
- **Vacancies and demand**, **Skills and succession** and **Reconciliation** (joins, moves and exits not yet matched to positions).



05 Communications and the feed

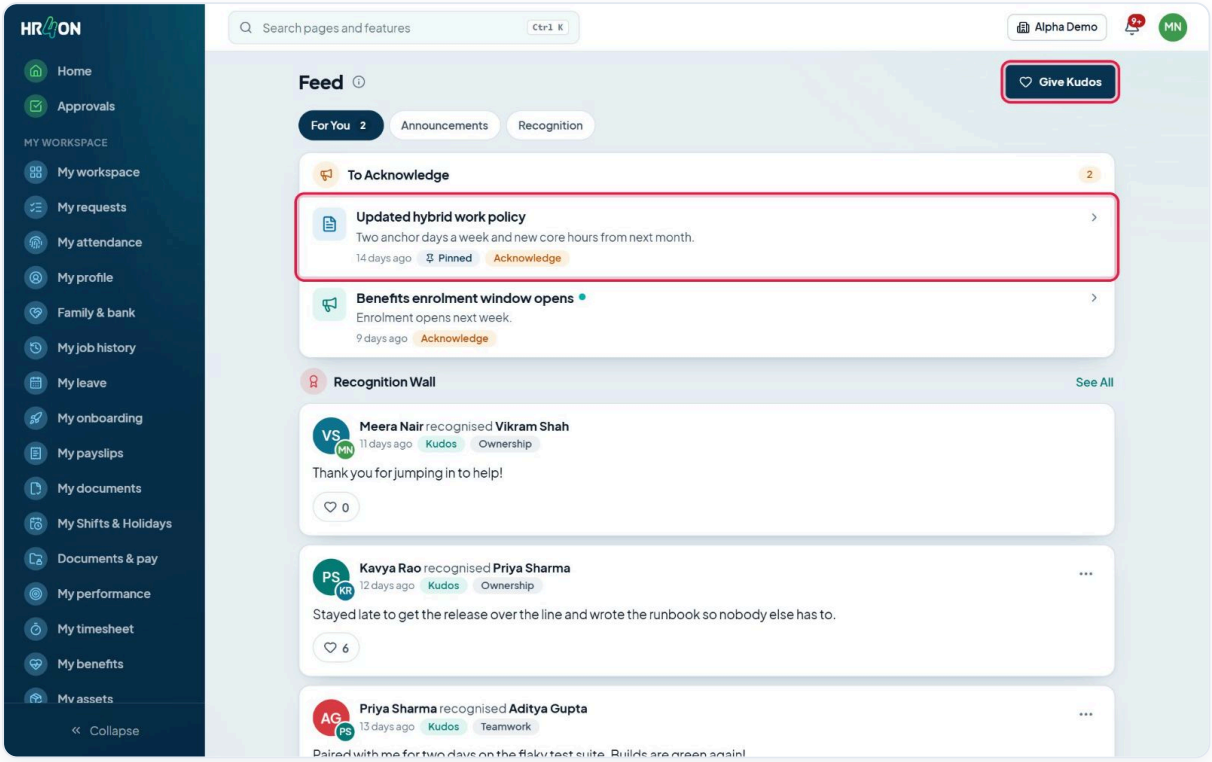
The feed is every employee's view of company news. Communications is where HR writes, approves and schedules what appears there.

5.1 The feed

Feed shows announcements for you, open surveys and recognition from colleagues.

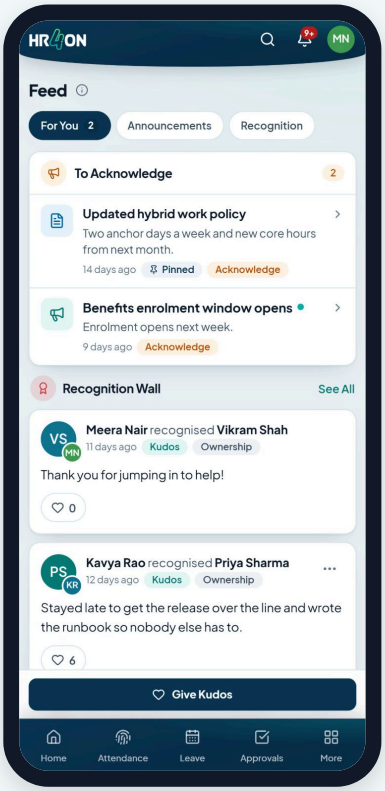
WHAT YOU SEE

- **For You**, **Announcements** and **Recognition** tabs.
- **To Acknowledge**: announcements you must confirm you have read. Opening marks them as viewed; only **Acknowledge** confirms reading.
- **Recognition Wall**: kudos and awards.



ON YOUR PHONE

The feed on a phone.



5.2 See communications

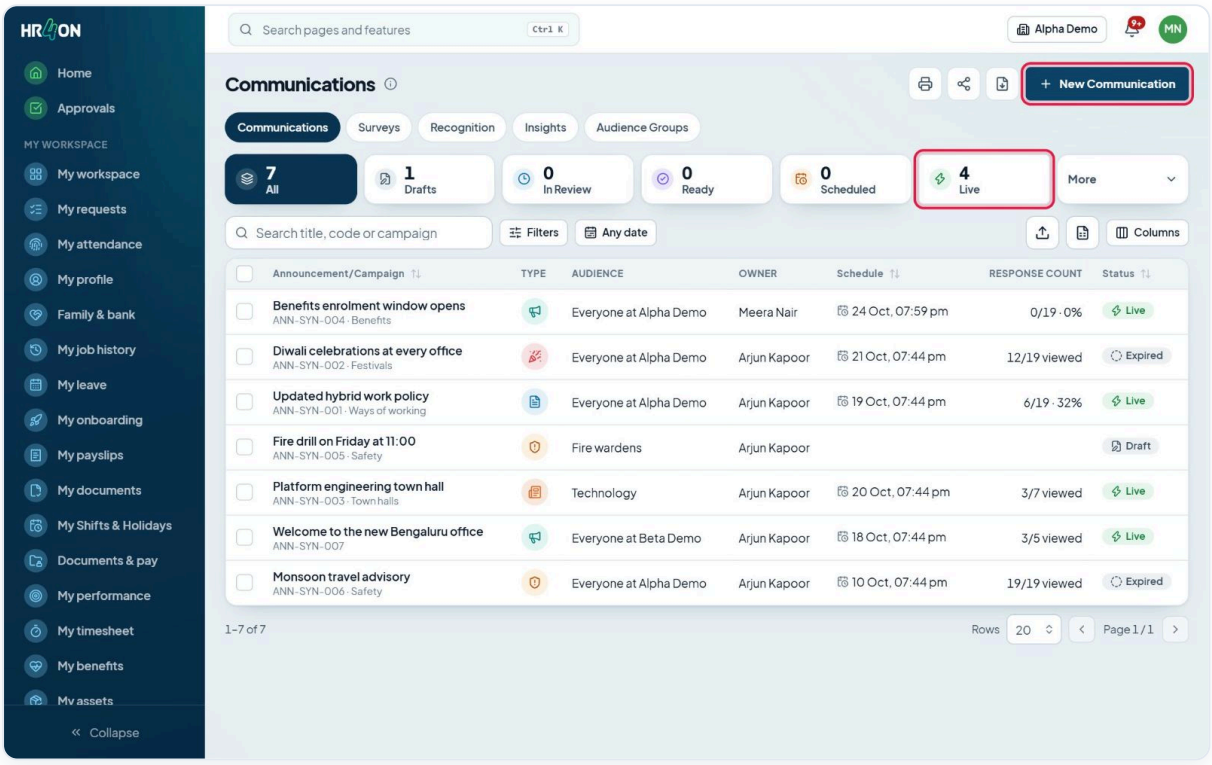
Communications lists announcements, policy notices, news, events and alerts with their audience and response.

WHAT YOU SEE

- Statuses: **Drafts**, **In Review**, **Ready**, **Scheduled**, **Live**, and expired or archived under **More**.
- **RESPONSE COUNT**: how many have viewed or acknowledged.

HOW TO DO IT

1. Open **Communications**.
2. Select **New Communication**, or open one.
3. Use **Import drafts** to load many drafts.



5.3 Write and publish an announcement

The editor guides you through content, audience, delivery and timing.

WHAT YOU SEE

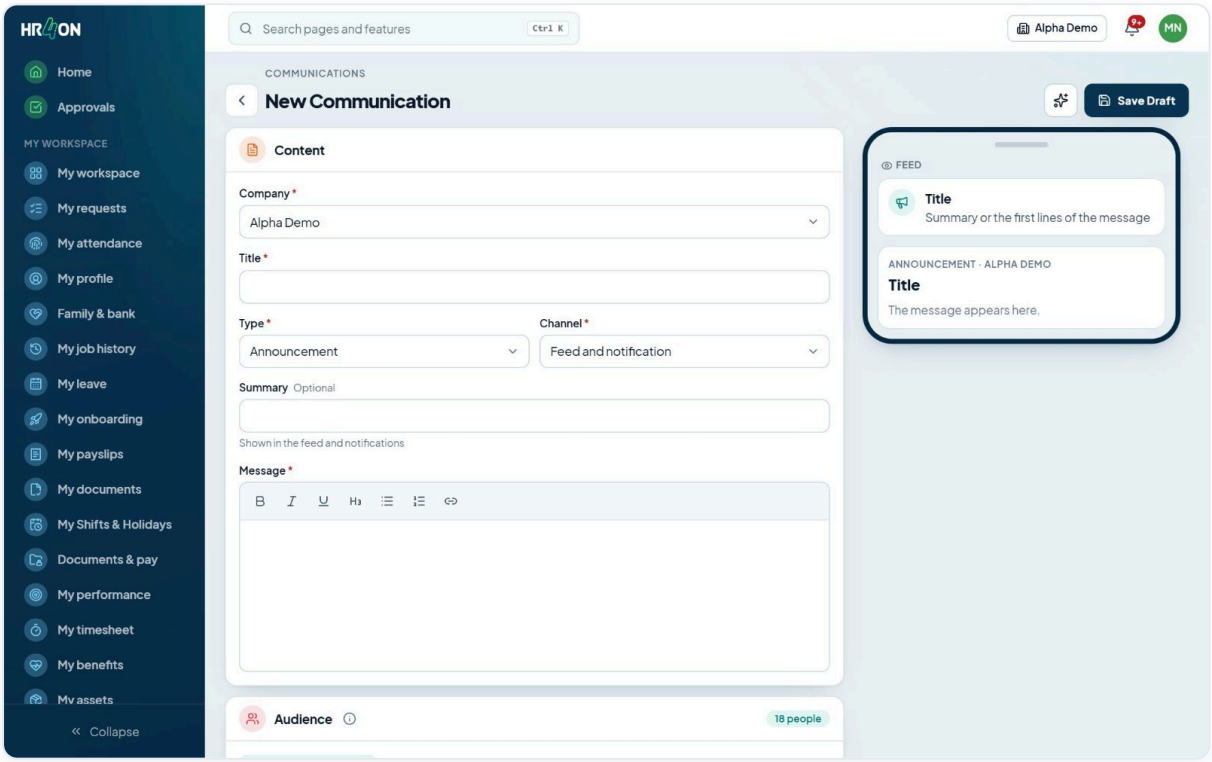
- **Content**: Title, Summary, Message, Key points, Type, Topic and attachments. Writing assist builds a structured draft from what you type.
- **Audience**: rules by company, department, location and so on, plus audience groups. No rules means everyone in the company.
- **Delivery**: Channel (Feed only, or Feed and notification), Requires acknowledgement, Pin to the top of the feed.
- **Timing**: Publish at and Expires at. Mobile preview shows how it looks on a phone.

HOW TO DO IT

1. Fill in the editor. The preview on the right shows how the post will look.
2. Select Save Draft, then Submit For Approval.
3. After approval it publishes at the set time.

GOOD TO KNOW

- Publication needs an approved version. The audience is worked out when it publishes.
- To change a live announcement, use Revise. Tick Material change (ask everyone to acknowledge again) for important changes.

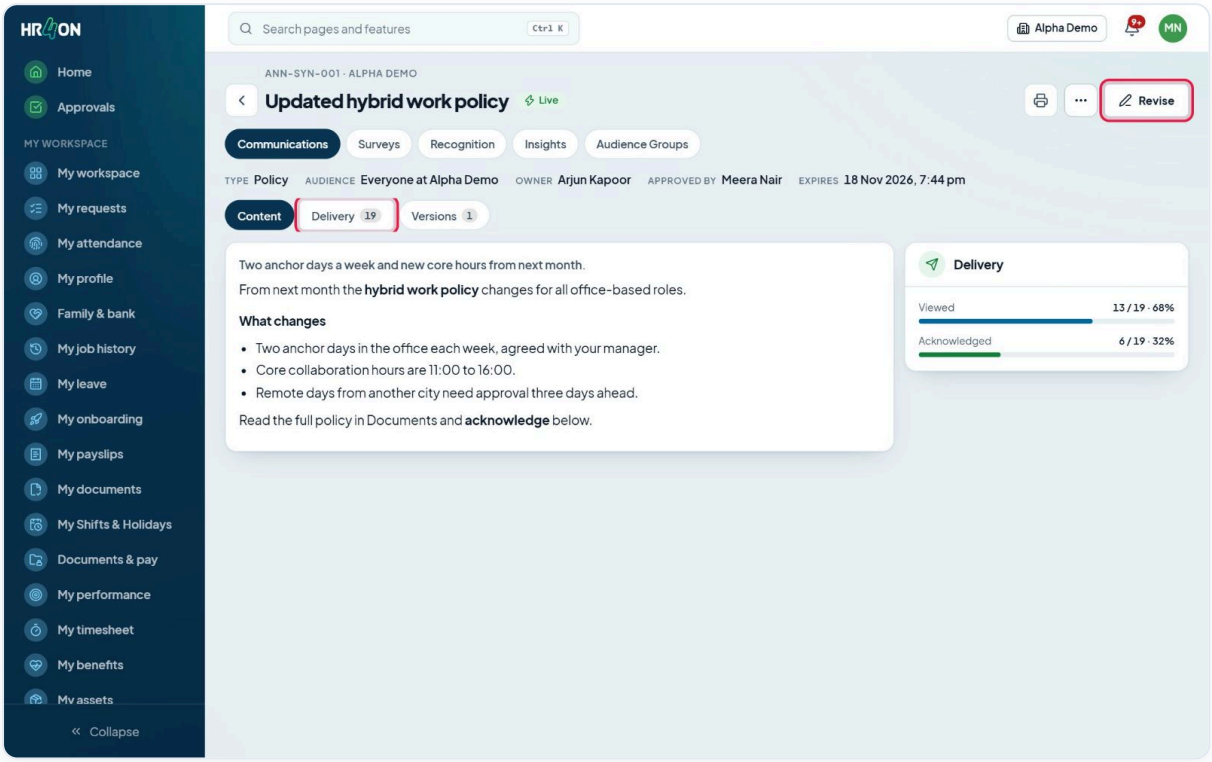


5.4 Track who has read it

A live communication shows how many people have viewed and acknowledged it, by department and person.

HOW TO DO IT

1. Open the communication. The **Content** tab shows what was published, with a **Delivery** summary beside it.
2. Select the **Delivery** tab to see **Recipients** and **By Department**.
3. Use **Revise** to change it, or **Versions** to see earlier versions.

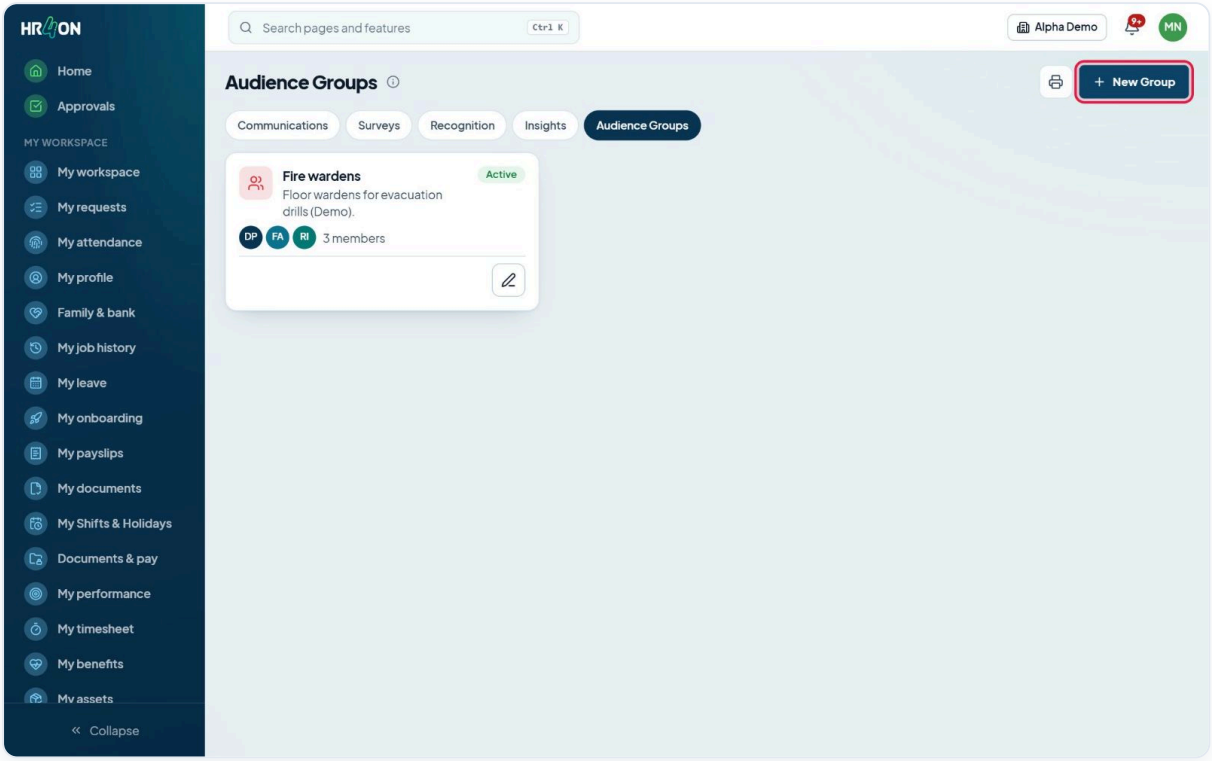


5.5 Audience groups

Audience groups are named lists of people, such as fire wardens or a town-hall panel. Members are included even when other rules would not match them.

HOW TO DO IT

1. Open **Audience Groups** and select **New Group**.
2. Add the name, description and members, then **Save**.



06 Surveys

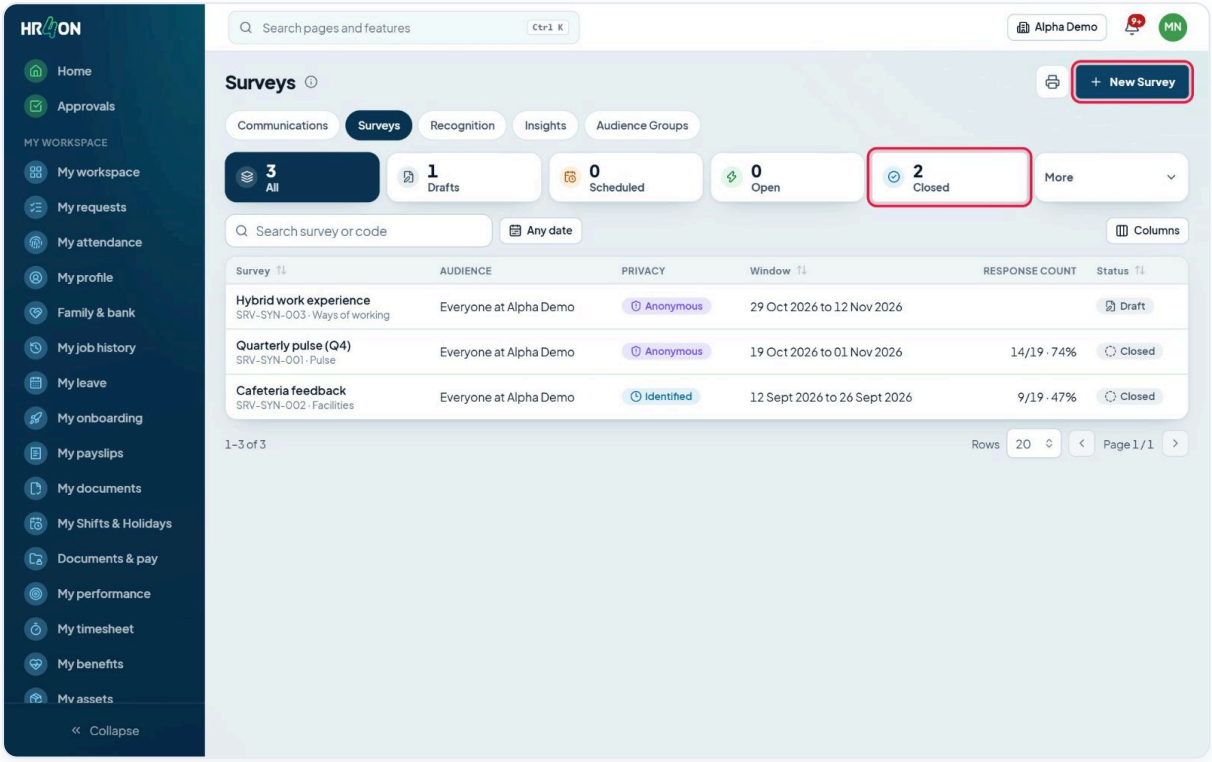
Surveys collect employee views, anonymously or with names, and show results without exposing small groups.

6.1 See surveys

Surveys lists surveys with their audience, privacy, window and participation.

HOW TO DO IT

1. Open **Surveys**.
2. Select **New Survey**, or open a survey.



6.2 Build a survey

The survey workspace holds the questions, audience, privacy and window.

WHAT YOU SEE

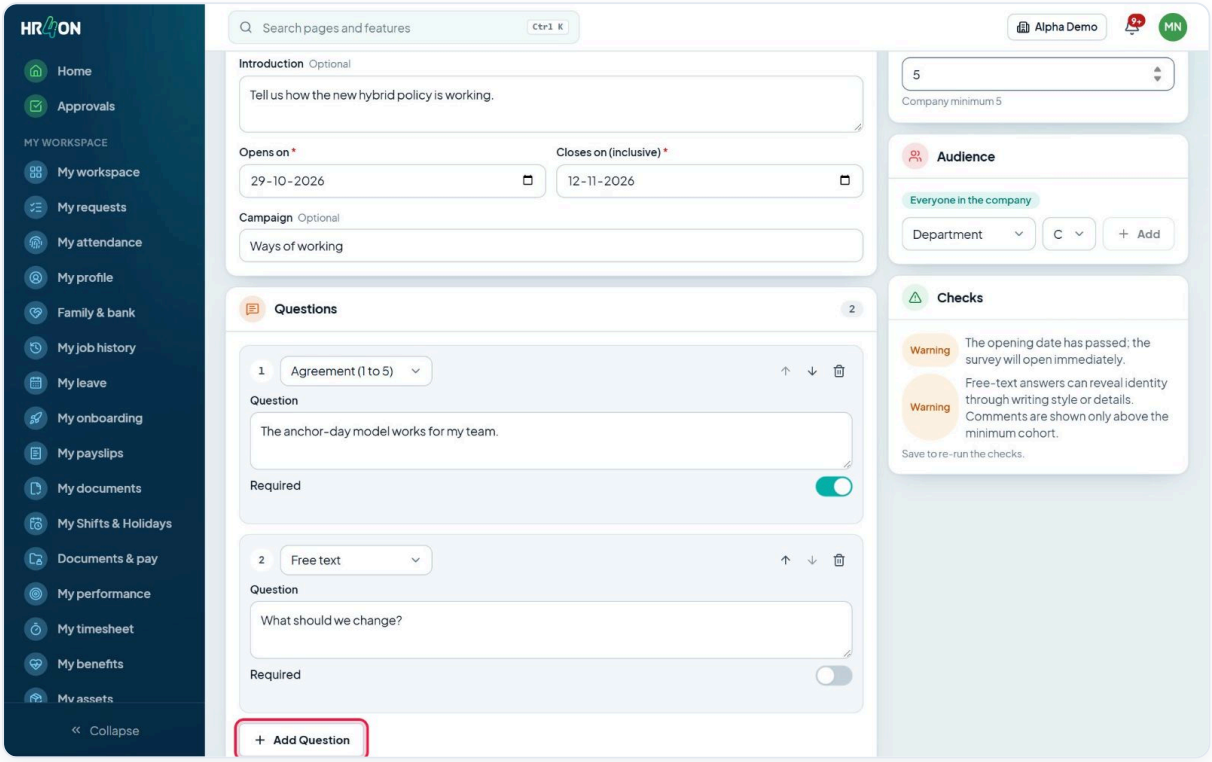
- **Questions** : **Add Question** , choose the type, mark **Required** , add options and reorder.
- **Privacy** : **Anonymous** or identified, and **Minimum cohort** : groups smaller than this are hidden in results.
- **Opens on** and **Closes on (inclusive)** ; **Respondents can edit until close** .

HOW TO DO IT

1. Fill in the survey and select **Save** .
2. Check **Checks** , then select **Open Survey** .

GOOD TO KNOW

- Anonymous answers are stored with no link to who responded, and are final.

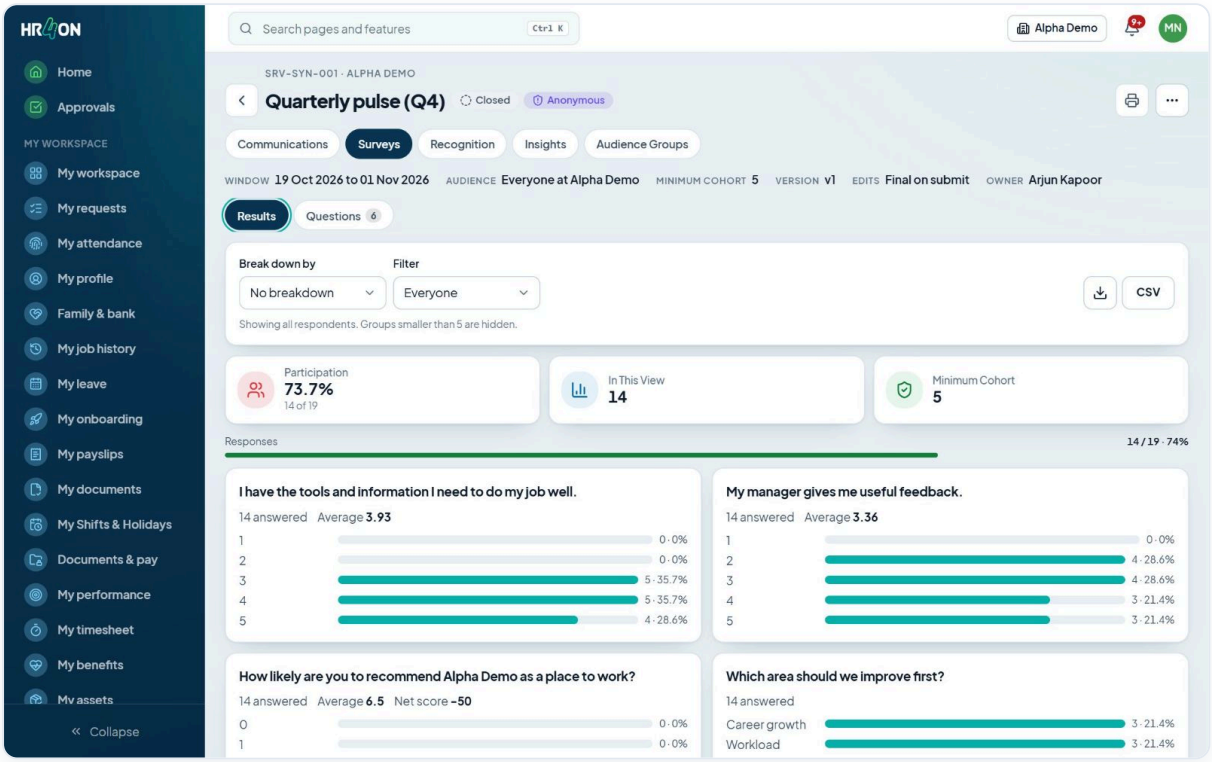


6.3 Read survey results

After responses arrive, the survey shows participation and results per question.

WHAT YOU SEE

- **Results** and **Questions** tabs; participation, responses in this view and the minimum cohort at the top.
- **Break down by** department or other groups, and **Filter**; groups below the minimum cohort are hidden.
- **Recurring Themes**: words and phrases raised by several respondents, never a single person's quote.
- **Download results PDF**.



07 Recognition and engagement insights

Recognition lets colleagues thank each other with kudos and nominates people for awards. Monetary awards flow to payroll.

7.1 Review nominations

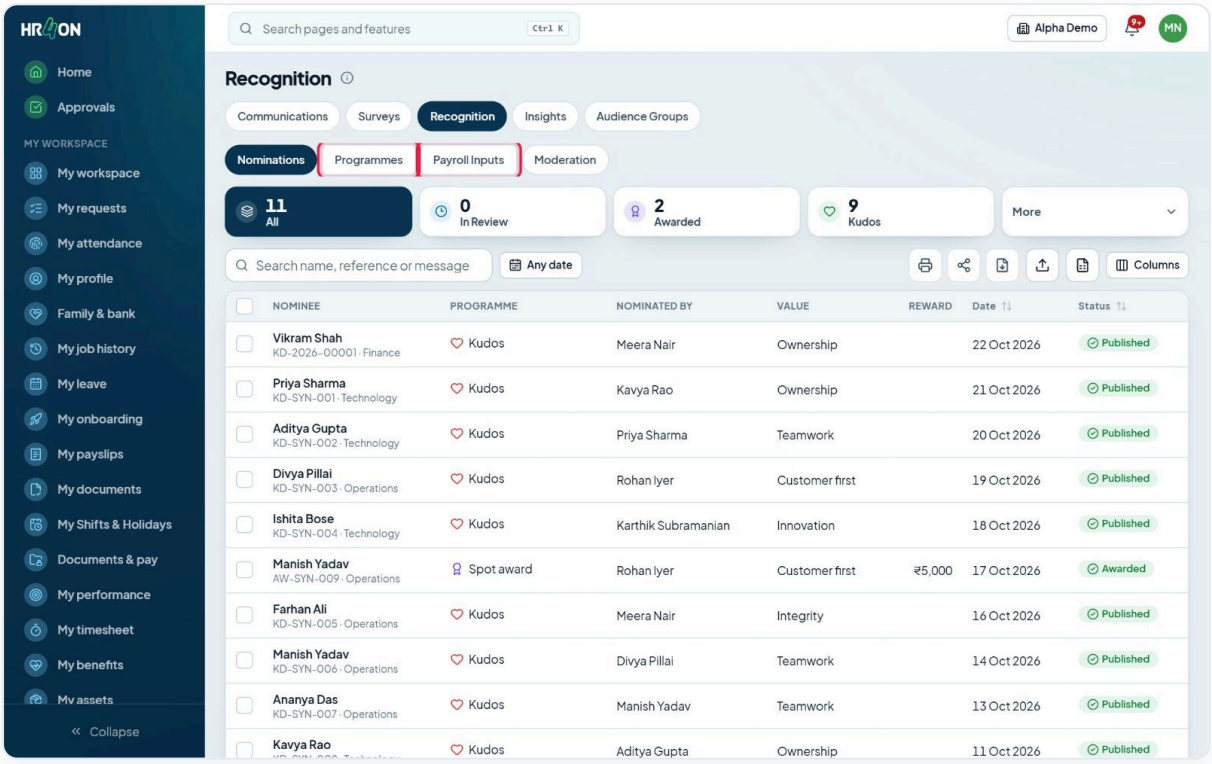
Recognition lists kudos and award nominations.

WHAT YOU SEE

- **In Review**: award nominations waiting for the recognition approver.
- **Awarded** and **Kudos**.
- Kudos are published straight away; awards are reviewed first.

HOW TO DO IT

1. Open **Recognition**.
2. Select a nomination to review, approve or reject it.



7.2 Set up recognition programmes

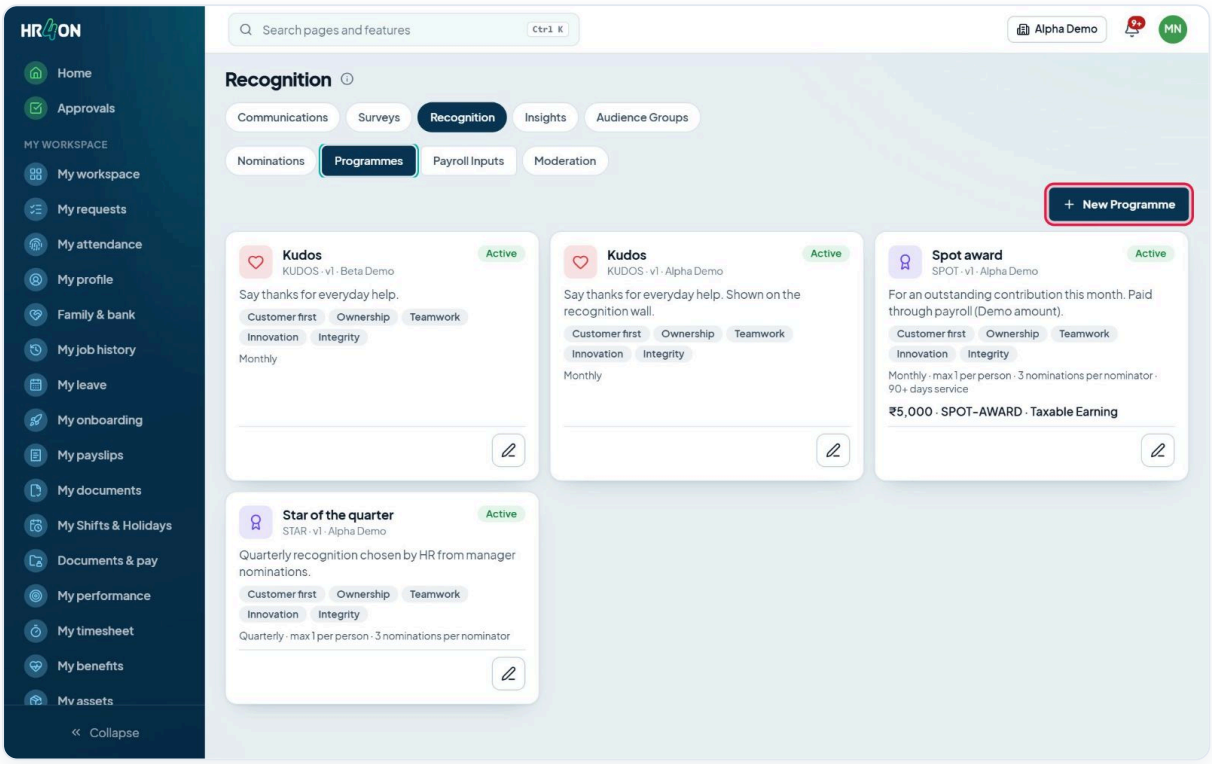
A programme defines a kind of recognition: kudos, spot awards or long-service awards.

WHAT YOU SEE

- **Type**: **Kudos (instant)** or **Award (reviewed)**.
- **Criteria / values**, **Min service (days)**, **Nominations per nominator**, **Awards per person** and **Allow self-nomination**.
- **Monetary reward through payroll**: **Amount**, **Pay component** and **Tax classification**.

HOW TO DO IT

1. Open the **Programmes** tab and select **New Programme**.
2. Fill in the rules and select **Save**.



7.3 Rewards, payroll inputs and moderation

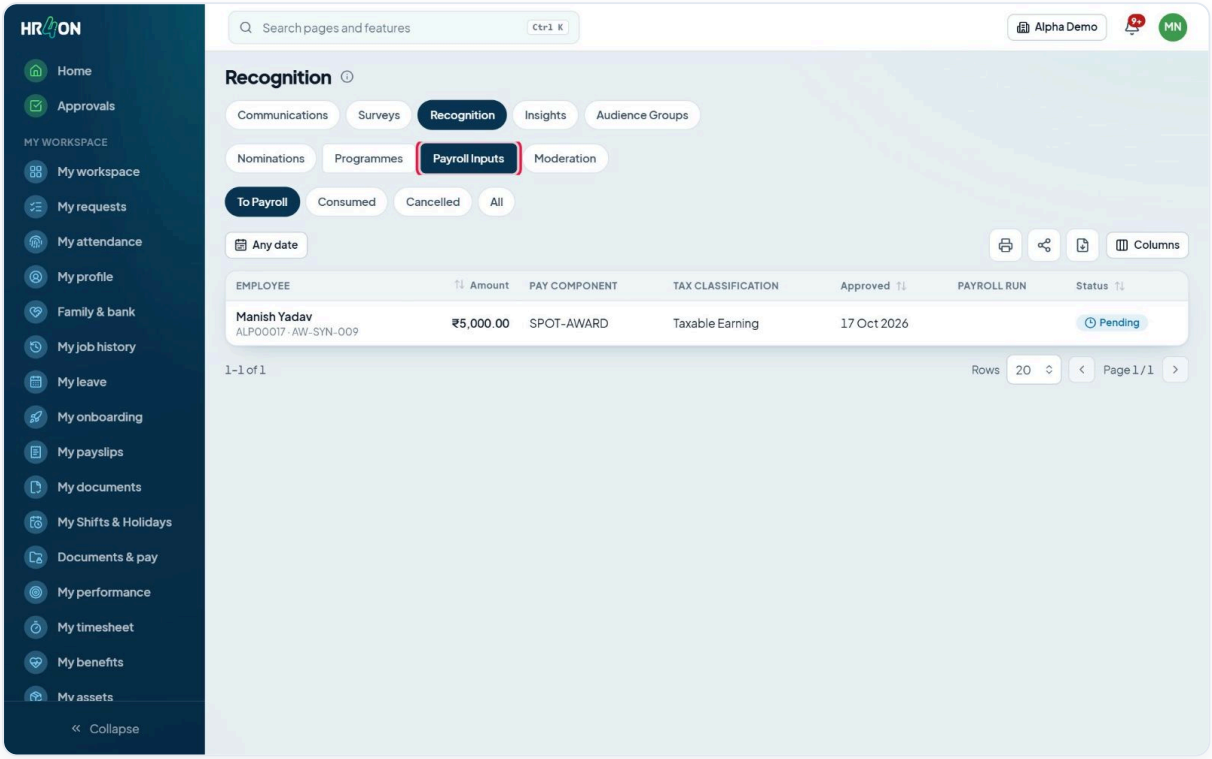
Approved monetary awards appear in **Payroll Inputs** for payroll. **Moderation** handles posts colleagues have reported.

HOW TO DO IT

1. Open **Payroll Inputs** to see awards waiting for payroll.
2. Open **Moderation** to **Dismiss** a report or **Remove Post**.

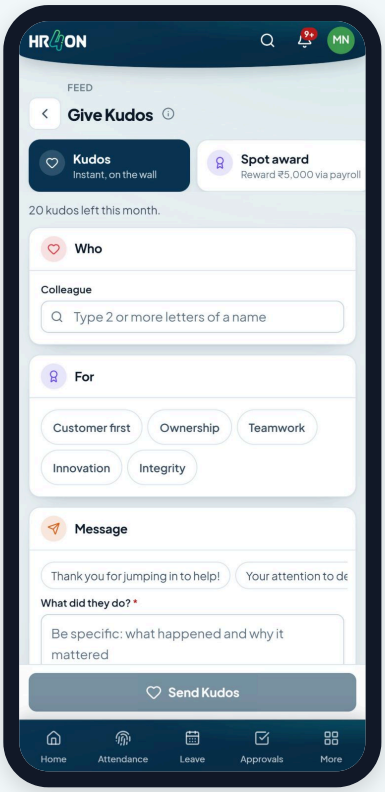
GOOD TO KNOW

- Publishing praise is not payment. Payroll pays the award with its tax treatment.



ON YOUR PHONE

Giving kudos on a phone.



7.4 Engagement insights

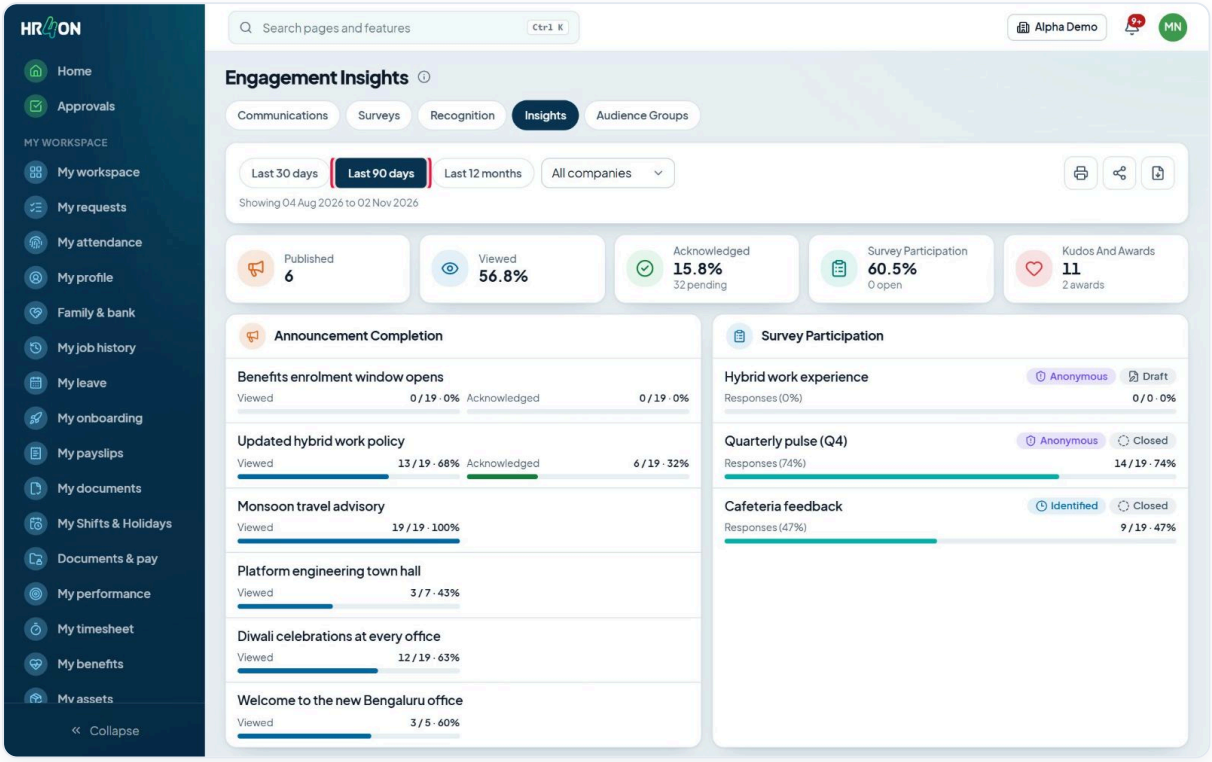
Engagement Insights brings together announcement reach, survey participation and recognition.

WHAT YOU SEE

- **Published**, **Viewed**, **Acknowledged**, **Survey Participation** and **Kudos And Awards**.
- **Announcement Completion** per announcement and **Recognition By Programme**.
- Counts and rates only; survey results open in the survey workspace.

HOW TO DO IT

1. Open **Engagement Insights**.
2. Choose **Last 30 days**, **Last 90 days** or **Last 12 months** and the company.



08 HR service desk

The HR service desk answers employees' questions and handles concerns, from an address change to a grievance. This chapter is shown as Lakshmi Menon, HR case worker.

8.1 Work the service queue

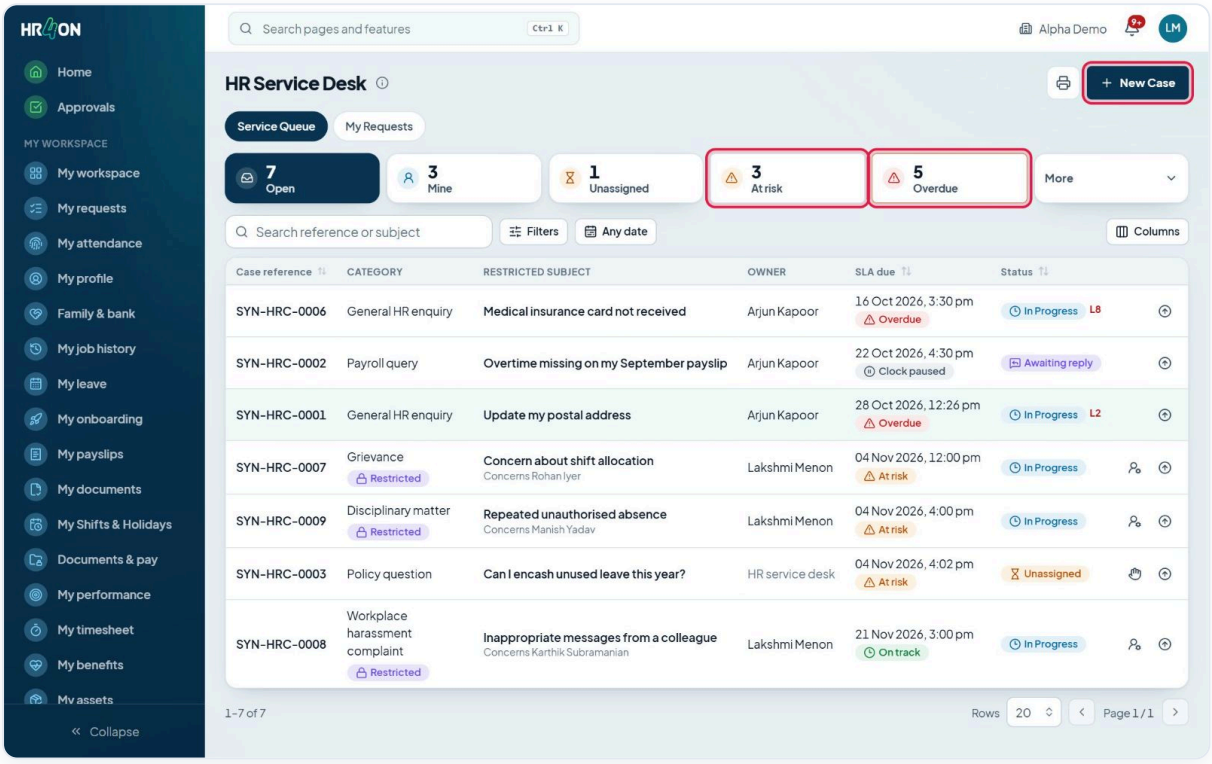
HR service desk under **Engage** opens the **Service Queue**: every case in your scope with its SLA.

WHAT YOU SEE

- **Open**, **Mine**, **Unassigned**, **At risk** and **Overdue** tiles.
- **SLA due** with **At risk**, **Overdue** or **Clock paused**; the **L** badge shows the escalation level.
- **Restricted** cases (grievances, disciplinary matters) show their subject only to the case team.

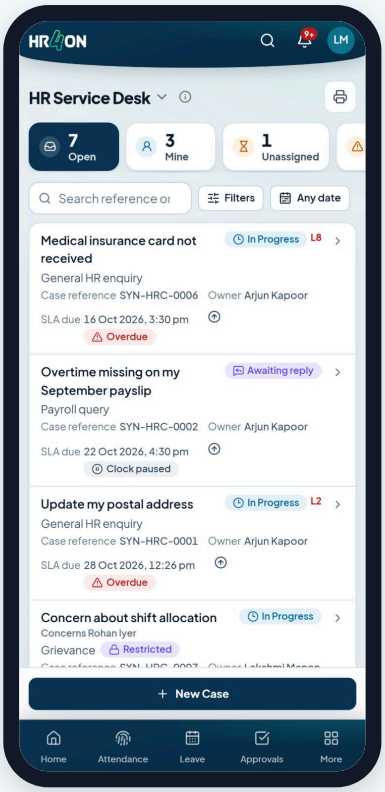
HOW TO DO IT

1. Open **HR service desk**.
2. Select **Unassigned** and use **Take** to pick up a case, or **Assign** it to a colleague.
3. Use **Escalate** when a case needs a senior colleague.
4. Select a case to open it.



ON YOUR PHONE

The queue on a phone.



8.2 Handle an ordinary case

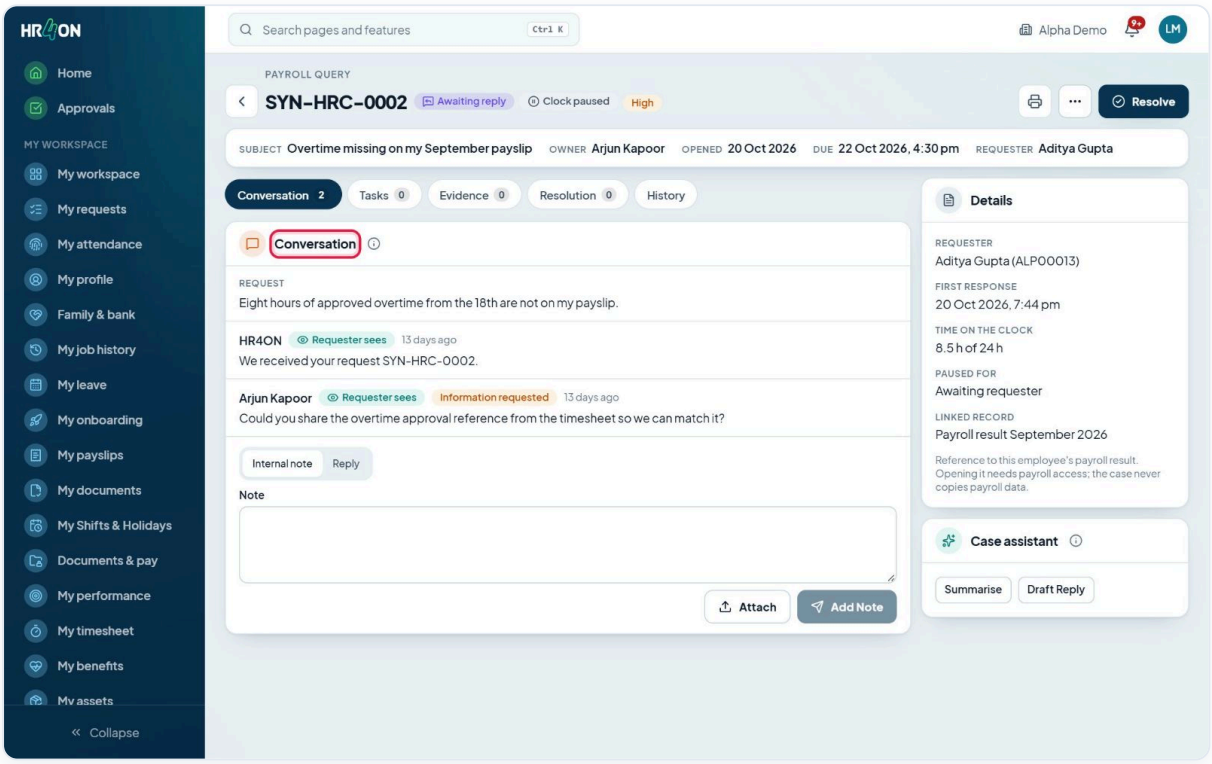
A case holds the conversation with the employee, details, tasks and history.

WHAT YOU SEE

- Tabs: **Conversation**, **Tasks**, **Evidence**, **Resolution** and **History**.
- **Conversation**: switch between **Internal note** and **Reply**, write in **Note** and select **Add Note** (or send the reply). **Attach** adds a file.
- **Case assistant**: **Summarise** quotes and counts only what you can already read; **Draft Reply** uses approved reply texts.
- **Details**: requester, first response, time on the clock and linked records.

HOW TO DO IT

1. Open the case and read the conversation.
2. Reply to the employee, or ask them for information. Waiting for the employee pauses the SLA clock.
3. Add follow-up work on the **Tasks** tab.
4. Select **Resolve** when done. The employee can reopen it if they are not satisfied.



8.3 SLAs and pausing the clock

Each category has a response and resolution target. Only allowed reasons, such as waiting for the employee, pause the clock, and each pause is reported.

WHAT YOU SEE

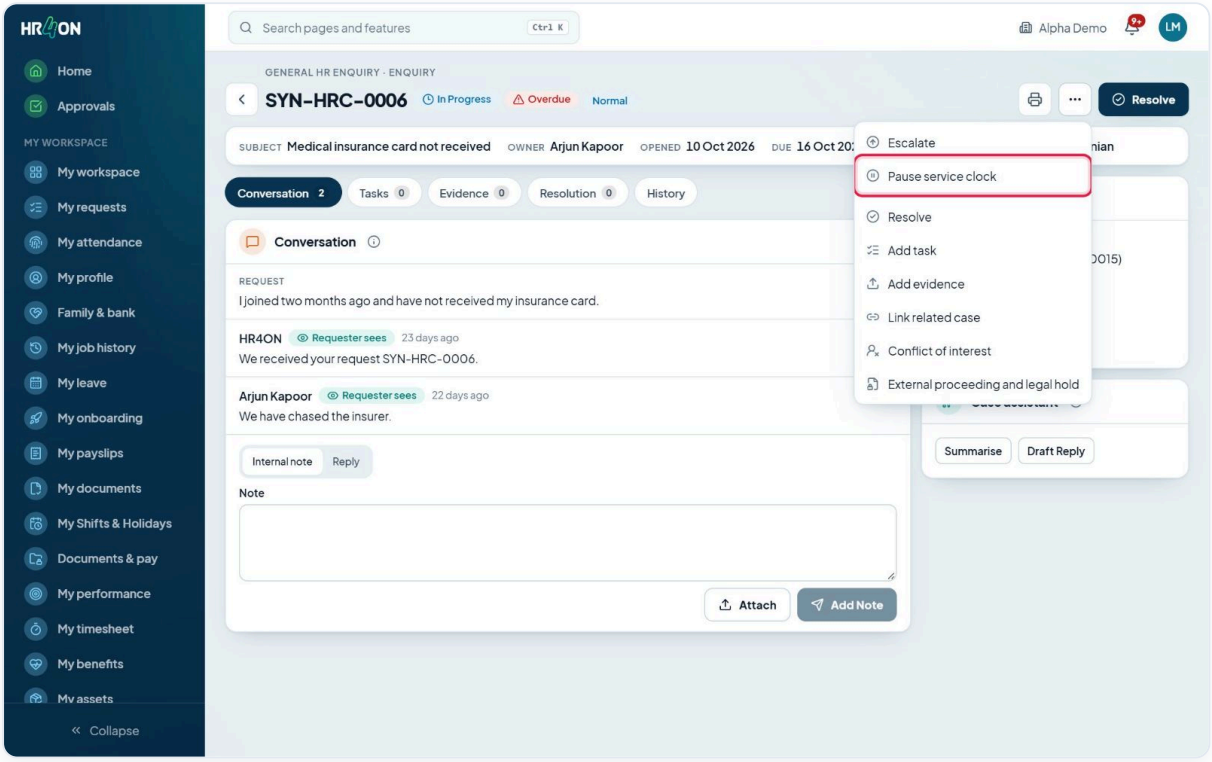
- The **More actions** menu on a case holds **Escalate**, **Pause service clock**, **Resolve**, **Add task**, **Add evidence**, **Link related case**, **Conflict of interest** and **External proceeding and legal hold**.

HOW TO DO IT

1. Open **More actions** and select **Pause service clock**.
2. Choose an **Allowed reason** and confirm.
3. Select **Resume** when you can continue.

GOOD TO KNOW

- Overdue cases escalate automatically to the next level.



8.4 Grievances and employee relations cases

Grievances, disciplinary matters and other sensitive cases are restricted. Only the case team can see the people, content and evidence.

WHAT YOU SEE

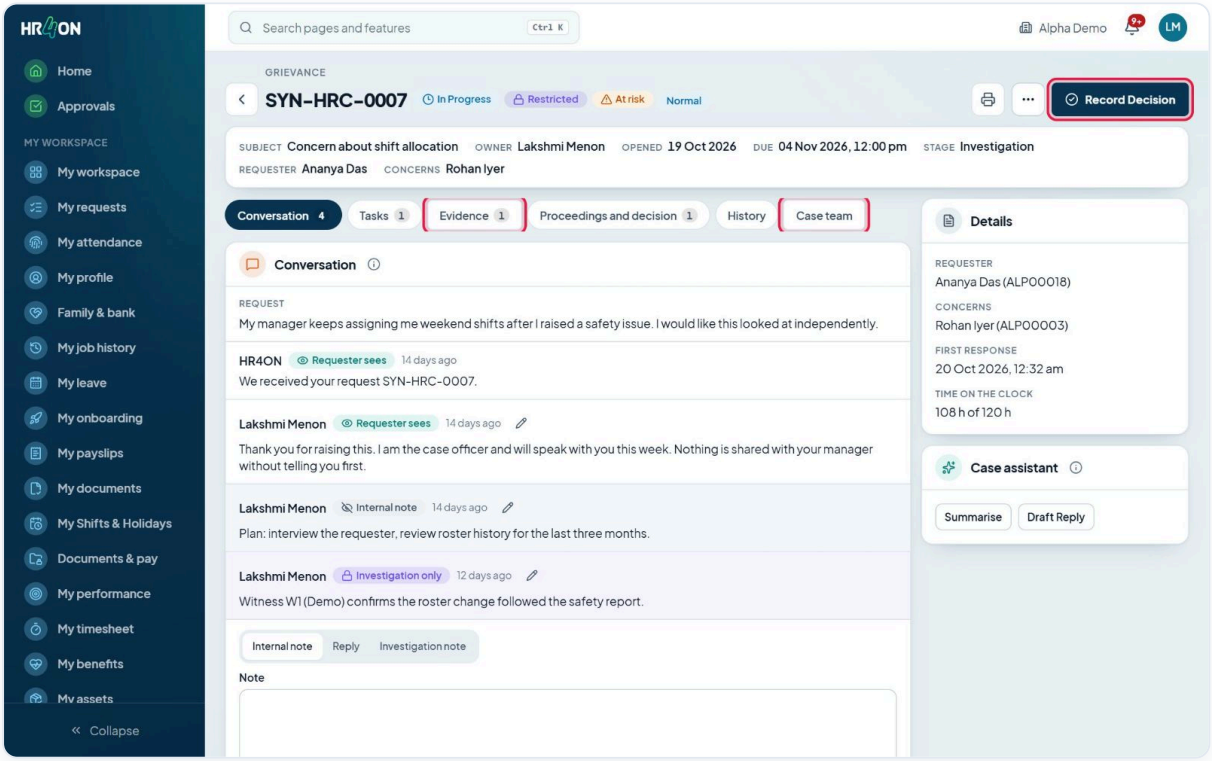
- Tabs: **Conversation**, **Tasks**, **Evidence**, **Proceedings and decision**, **History** and **Case team**.
- **Case team**: the people with access and their rights. **Assign Officer** and **Grant Access** (personal, time-limited and audited).
- **Evidence**: files in private storage with a fingerprint and a custody trail of every view and download.
- Steps such as **Notice of allegation**, **Investigation meeting** and **Hearing** are recorded with participants and outcomes.
- **Legal hold** suspends retention for the case and its evidence.

HOW TO DO IT

1. Open the restricted case from the queue.
2. Check the case team and record any conflict of interest (**Exclude Person** or **Recuse Myself**).
3. Record each step and add evidence with **Add Evidence**.
4. Select **Record Decision** to record the outcome. Choose what the requester and the employee concerned see.

GOOD TO KNOW

- The employee concerned sees only the notice or hearing date and the outcome summary, never the notes or evidence.
- Every view of a restricted case is logged in the **Access Log**.

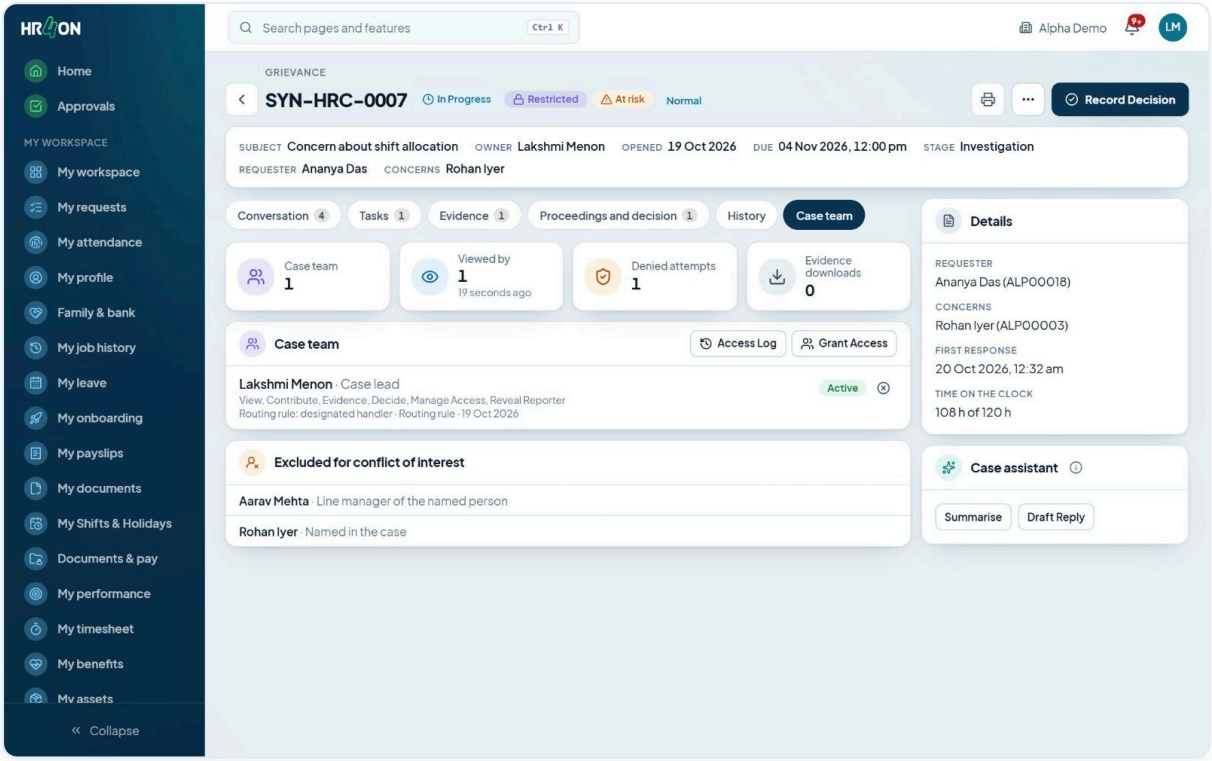


8.5 Access log and appeals

The access log lists everyone who viewed the case, evidence downloads and denied attempts. Appeals are reviewed by someone independent of the original decision.

HOW TO DO IT

1. Open the **Case team** tab on a restricted case to see the team and the **Access Log**.
2. For an appeal, open **Appeals** and record the review.



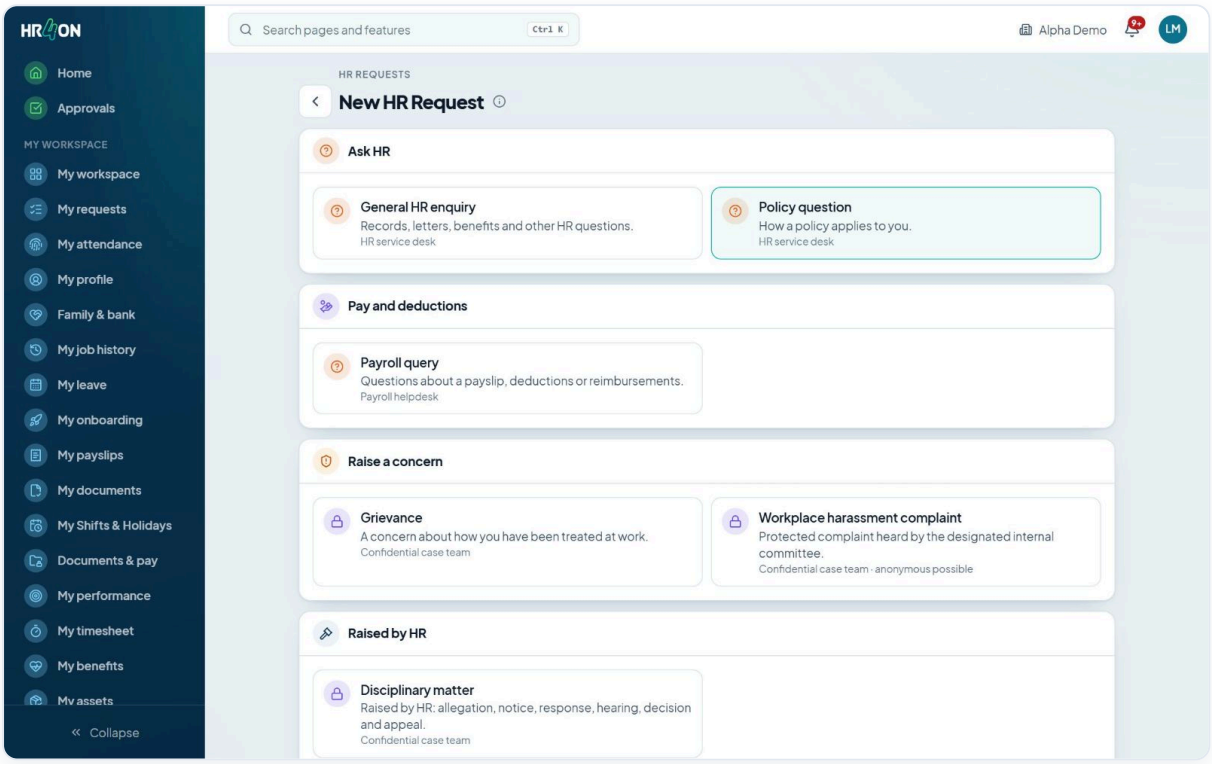
8.6 Raise a case for an employee

Use **New Case** when an employee contacts HR by phone or in person.

HOW TO DO IT

1. Select **New Case**.
2. Choose the category, the employee in **On behalf of**, a **Short title** and the details.
3. Tick **Handle confidentially** or **Sensitive** when needed, then **Send Request**.

> **TIP**
> - Employees can also report anonymously; case handlers then do not see their name.



A Words used in this guide

Review cycle
A performance period that takes people from goals to a released outcome.

Population
The people included in a cycle, snapshotted at launch.

Goal sheet
A person's goals with weights and progress.

Check-in
A recorded conversation about progress during the cycle.

Calibration
Comparing and adjusting ratings across teams before release.

Four-eyes approval
A decision must be approved by someone other than the person who proposed it.

Outcome
The approved rating released to the employee.

Development plan
A plan to grow a person's skills.

Improvement plan (PIP)
A plan to address performance gaps, approved before it starts.

Recommendation
A proposed increase or promotion from a review outcome.

Required learning
Mandatory training such as POSH or information security.

Session
A scheduled classroom or virtual run of a course.

Critical certificate
A certificate needed for certain work; when it expires, deployment is restricted.

Position
An approved seat with planned FTE and cost.

FTE
Full-time equivalent: 1 means one full-time person.

Scenario
A headcount plan with lines, assumptions and cost.

Succession plan
Candidates and readiness for a critical role.

Internal move
An employee moving to an internally offered vacancy.

Acknowledgement
Confirmation that an employee has read an announcement.

Audience group
A named list of people used to target communications.

Minimum cohort
The smallest group shown in survey results, to protect anonymity.

Kudos
Instant public thanks from a colleague.

Award
A reviewed nomination, sometimes with a monetary reward.

SLA
The response and resolution target for a case.

Restricted case
A sensitive case visible only to its case team.

Legal hold
Keeps a case and its evidence beyond normal retention.