USER GUIDE

HR Guide: Time, Attendance and Leave

Run attendance, leave, shifts, holidays and project time for your company, from the daily register to the payroll hand-over.

WHO IT'S FOR

HR administrators and HR operators who look after attendance, leave, rosters and project time

COVERS

Attendance, exceptions and corrections, punch reviews, devices and policies, attendance periods, leave administration, shifts and rosters, holiday calendars, projects, allocations, timesheets and utilisation

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

About this guide

This guide is for the people in HR who keep working time accurate: who was at work, who was on leave, who worked which shift and how much time went to each project. It follows the work in the order you usually do it during a month, and ends with the hand-over to payroll.

Everything you do in this area sits under **Time & attendance** in the menu: **Attendance**, **Leave**, **Shifts & Rosters**, **Holiday Calendars**, **Projects & allocation**, **Allocation planner**, **Project approvals** and **Utilisation & cost**. Your own attendance, leave and timesheet are under **My workspace** and are explained in the Employee Guide.

The screenshots show Meera Nair, HR administrator at Alpha Demo, working with demo data. Your screens show your own company, people and dates, and you only see the people your access covers.

What you can do in HR4ON

- Watch today's attendance and look back at any day
- Fix missing punches and decide exceptions with a recorded reason
- Review remote and selfie punches
- Set up attendance policies, overtime, devices, geofences and badge mappings
- Validate and freeze an attendance period for payroll
- Manage leave types, policies, balances, accrual, year-end and encashment
- Plan shifts and rosters, approve swaps and publish schedules
- Maintain holiday calendars, including optional holidays
- Set up projects, allocate people and approve project time
- Report on utilisation and labour cost

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. Dates and numbers in the screenshots come from the demo company and change from day to day.

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01 Daily attendance

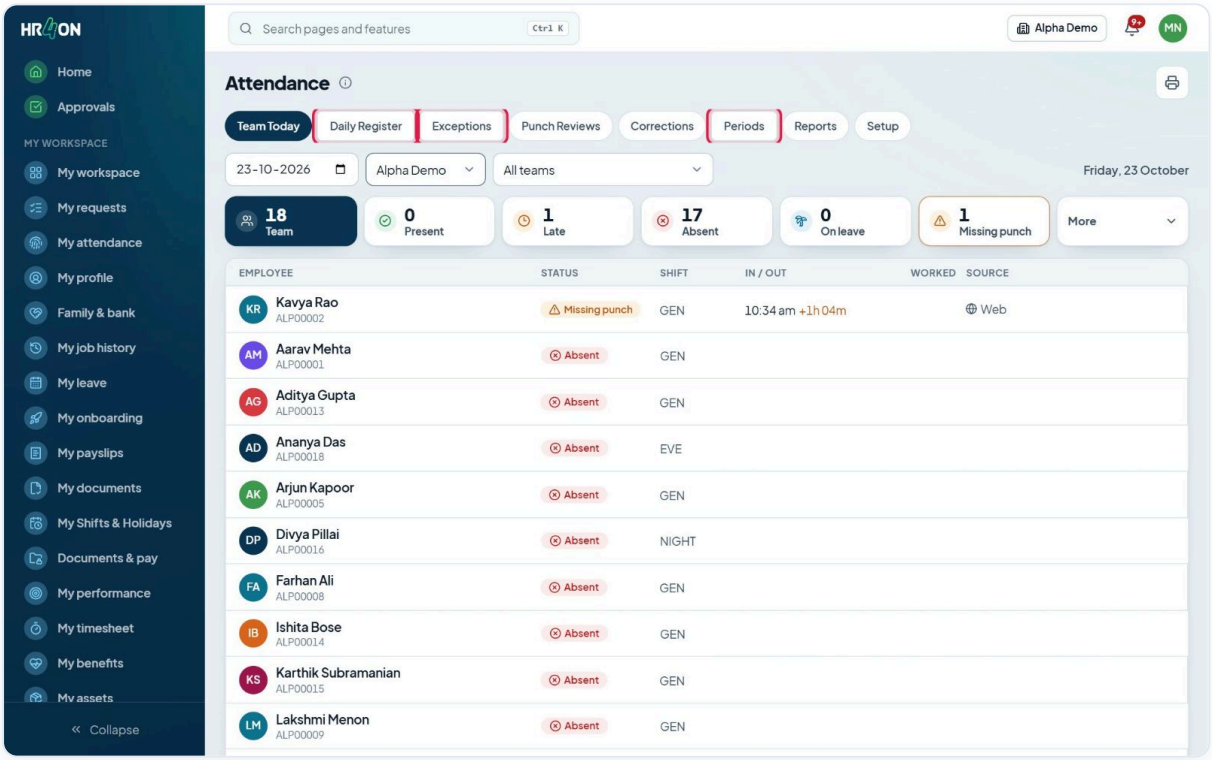
Attendance shows who is at work today, the calculated register for any date range and the full evidence behind each day. Start here every morning.

1.1 Find your way around Attendance

Open **Attendance** under **Time & attendance** in the menu. All attendance work for HR lives on one page with a row of tabs across the top.

THE ATTENDANCE TABS

- **Team Today**: the live board for a date.
- **Daily Register**: one row per person per day, with status and worked time.
- **Exceptions**: missing punches, absences under review and unmapped device punches.
- **Punch Reviews**: remote and outside-office punches waiting for a decision.
- **Corrections**: correction and overtime requests from employees.
- **Periods**: monthly attendance periods you freeze for payroll.
- **Reports** and **Setup**: muster roll, late arrivals, overtime, and the policies and devices behind it all.



1.2 See who is in today

Team Today counts everyone by status for the chosen date, so you can see at a glance who is present, late, absent, on leave or missing a punch.

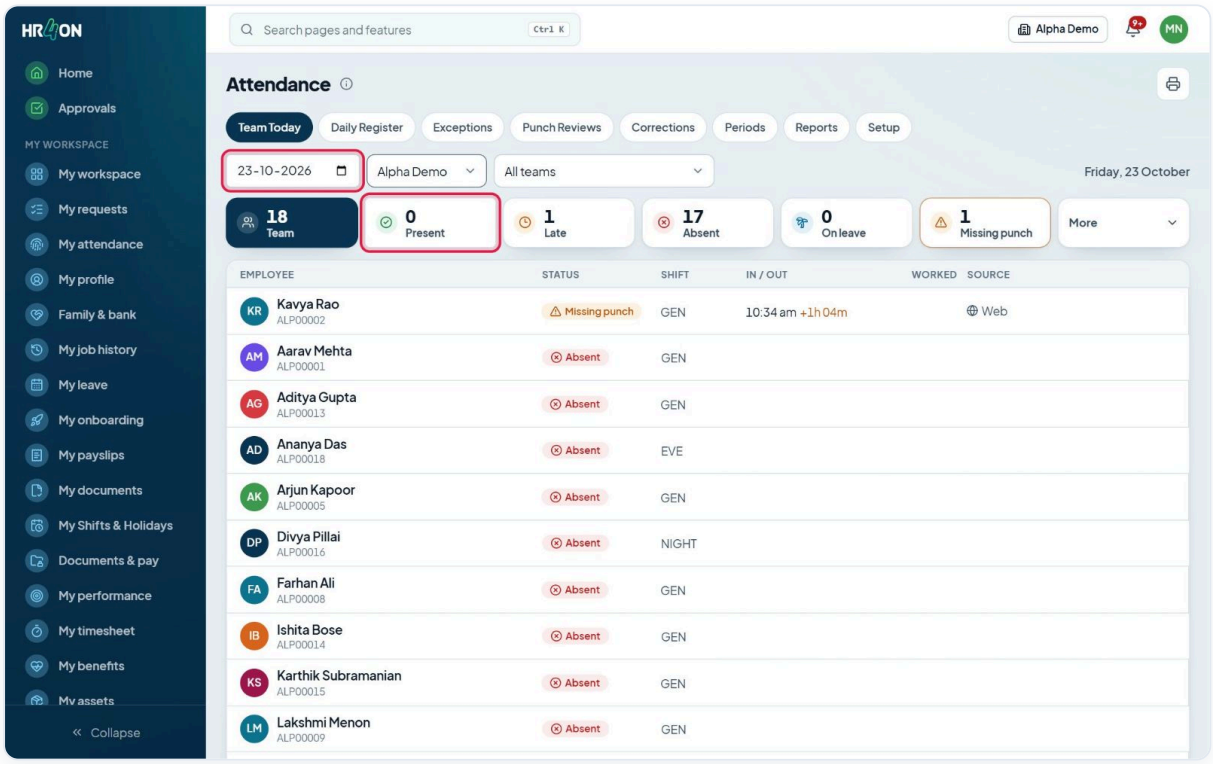
WHAT YOU SEE

- The count tiles (**Present**, **Late**, **Not in yet**, **Absent**, **On leave**, **Missing punch**) filter the list below when you select them.
- Use the company and team pickers to narrow the board to one department, branch or team.
- Each row shows the person, their status, shift code, first in and last out, worked time and the punch source (web, phone or device).

HOW TO DO IT

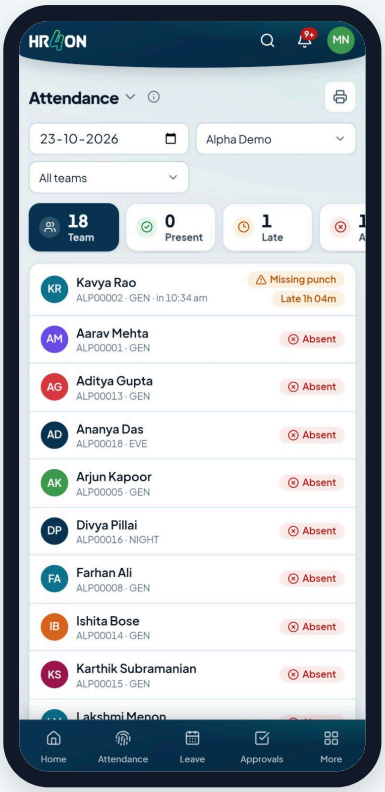
1. Open **Attendance**. The board opens on today.
2. To look at another day, pick it in the date box. You cannot pick a future date.
3. Select a status tile to list only those people.
4. Select a person to open their attendance day with the punch evidence.

> **TIP**
> - Early in the morning most people show **Not in yet**. Their status changes as punches arrive.



ON YOUR PHONE

Team Today works on a phone, so you can check attendance on the move.



1.3 Use the Daily Register

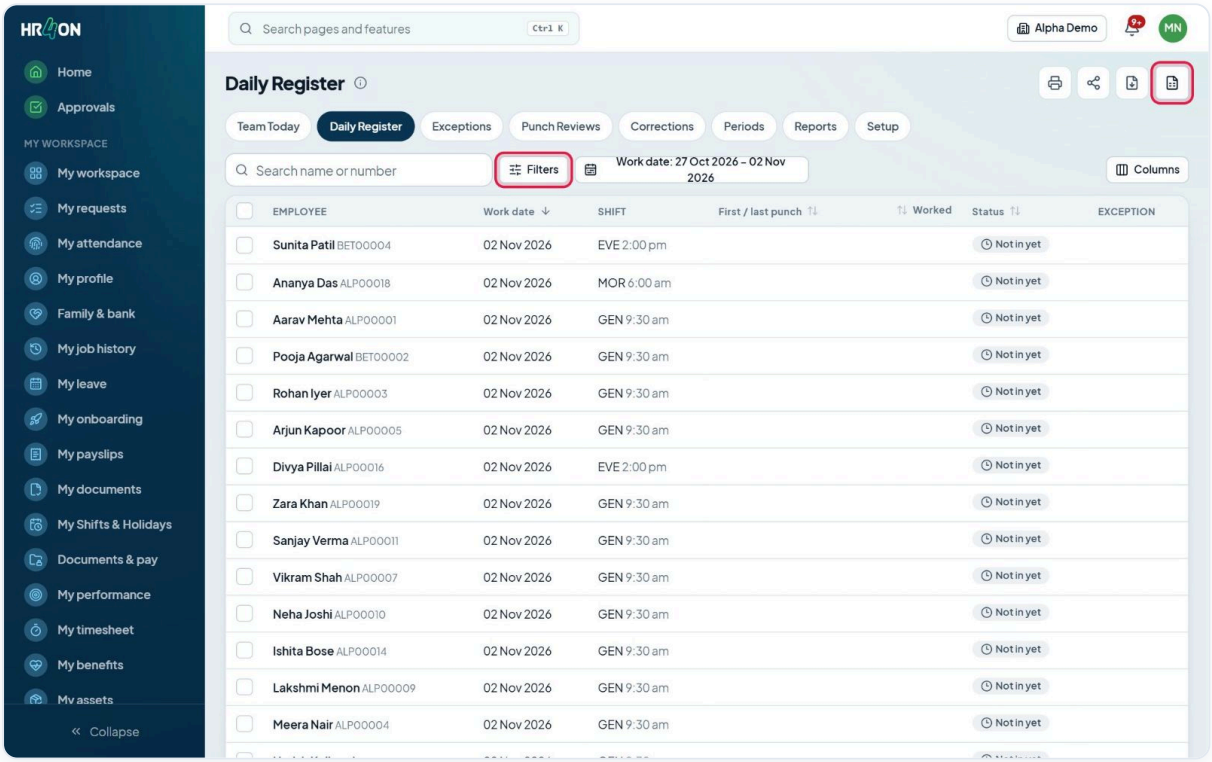
The Daily Register is the calculated attendance for every person and day. Use it to check a week, find late arrivals or export attendance for a team.

WHAT YOU SEE

- **Work date**, **Shift**, **First / last punch**, **Worked** and **Status** columns. **Exception** shows what still needs attention.
- Statuses include Present, Half day, Absent, Leave, Holiday, Weekly off, Missing punch and Not in yet.
- **Filters** narrows by team, status or exception; the date chip sets the range (the last 7 days by default).

HOW TO DO IT

1. Select the **Daily Register** tab.
2. Change the date range with the **Work date** chip, or open **Filters**.
3. Select a row to open that attendance day.
4. Use **Export** to download the rows you are looking at, or **Columns** to show or hide columns.



1.4 Read an attendance day

An attendance day shows exactly how a person's day was calculated, with every punch as it was received. Open it whenever someone questions their attendance.

WHAT YOU SEE

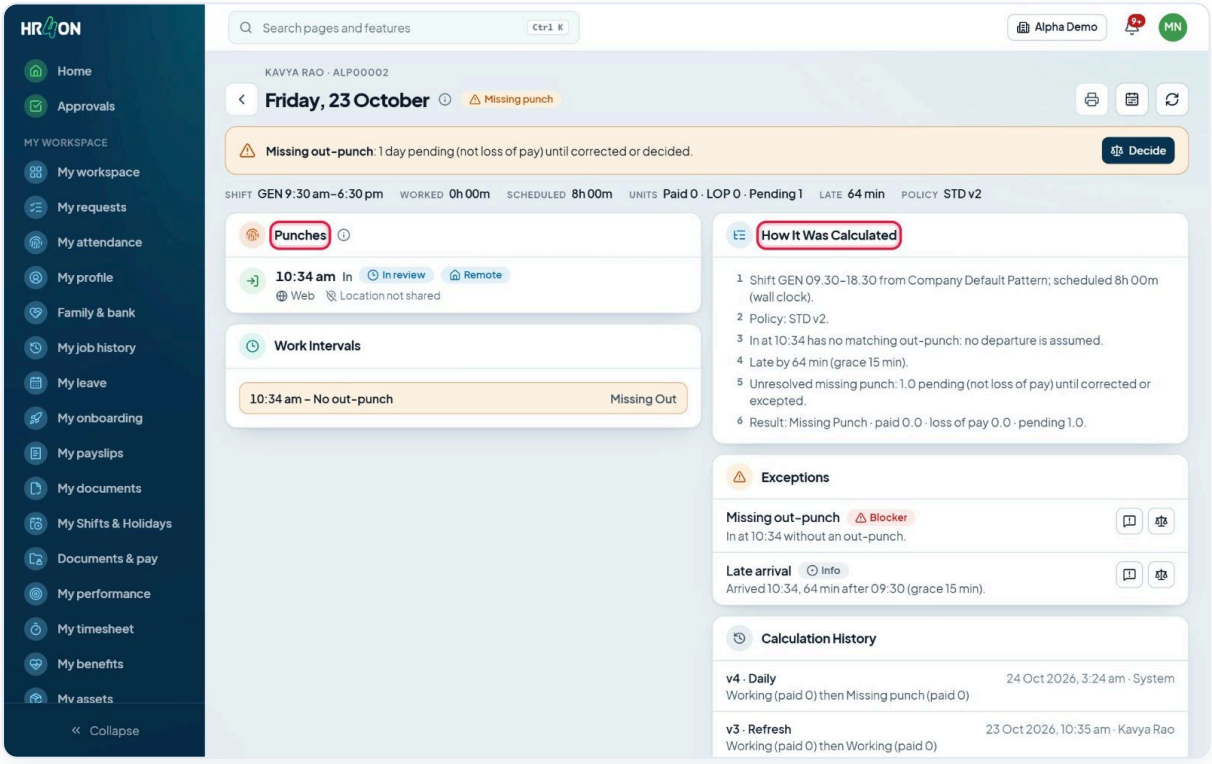
- **Punches**: raw punches from the web, phone or a device. Location is shown only to the employee and HR.
- **Work Intervals** and **How It Was Calculated**: the in and out pairs and the policy rules applied (grace, rounding, break deduction, thresholds).
- **Exceptions**, **Correction Requests** and **Overtime**: what is open on this day.
- **Calculation History**: every recalculation, with who triggered it.

HOW TO DO IT

1. Open a day from Team Today, the Daily Register or Exceptions.
2. Read the status banner and the summary line: shift, worked and scheduled time, paid, loss of pay and pending units, late minutes and the policy version.
3. Select **Decide** to resolve the exception yourself, or use the icons next to an exception to request evidence or decide it.
4. Use the calendar button at the top to open the person's month, or the **Recalculate** button if a roster, leave or policy change has not yet been reflected.

GOOD TO KNOW

- When the period is frozen the day shows **Payroll frozen**. Changes after that become adjustments for a later payroll.

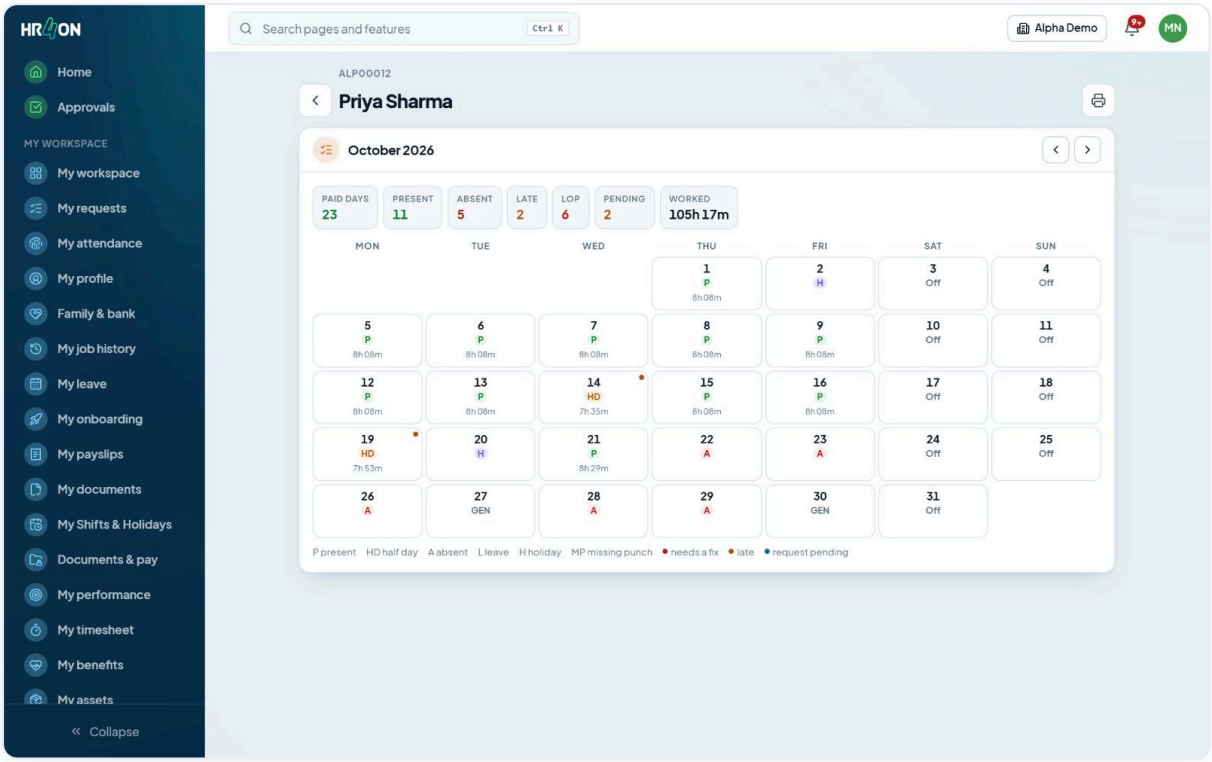


1.5 See one person's month

The month calendar shows one person's attendance day by day, with leave, holidays and weekly offs, and the paid days for the month.

HOW TO DO IT

1. Open **Reports** and select a name in the muster roll, or open a person from Team Today on a day without punches.
2. Move between months with the arrows.
3. Select a day to open its full detail.



1.6 Run attendance reports

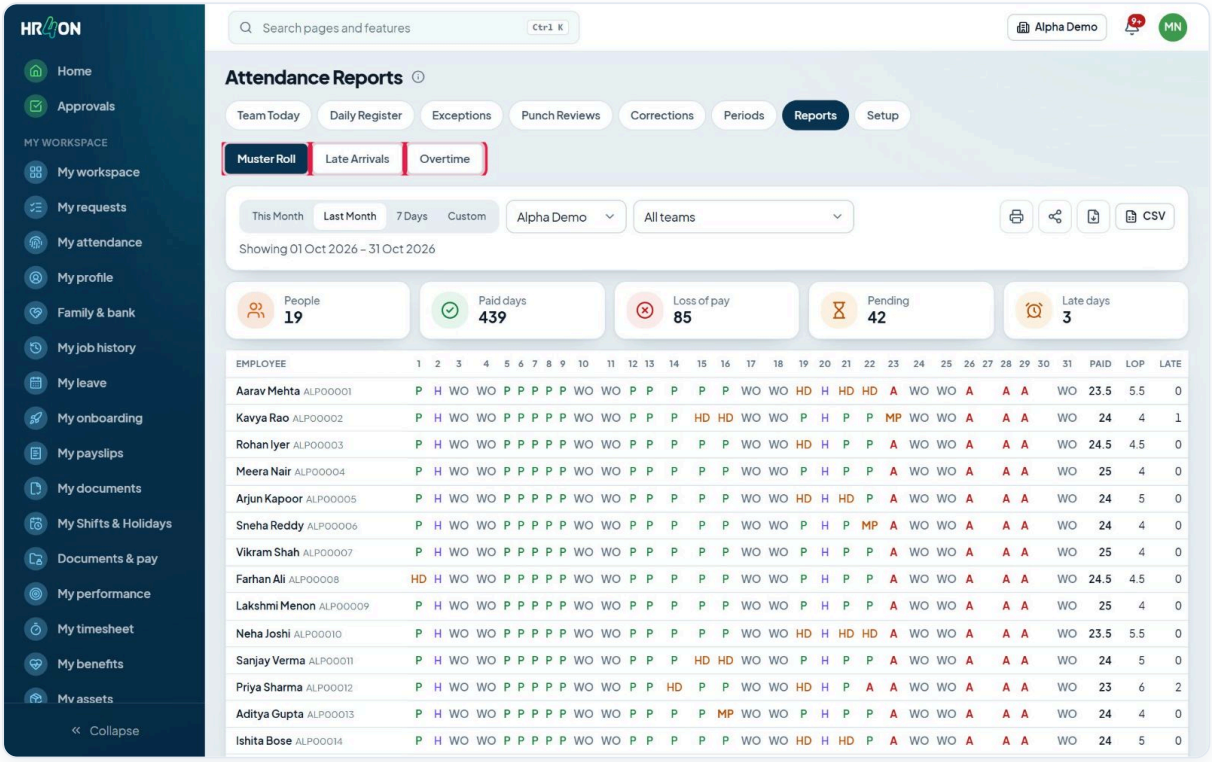
Reports summarise attendance for a period: the muster roll for paid days and loss of pay, late arrivals and overtime.

WHAT YOU SEE

- **Muster Roll**: one row per person with a code for each day and totals for paid days, loss of pay (LOP) and late days. The legend under the table explains each code (P present, HD half day, A absent, L leave, H holiday, WO weekly off, MP missing punch and so on).
- **Late Arrivals**: everyone who came in after grace, with minutes late.
- **Overtime**: overtime worked, approved and payable.

HOW TO DO IT

1. Select the **Reports** tab.
2. Choose **This Month**, **Last Month**, **7 Days** or **Custom**.
3. Pick a company and team if you need to.
4. Use **CSV**, **Download PDF** or **Print** to share the report.



02 Exceptions, corrections and punch reviews

Every month some days need a human decision: a forgotten out-punch, an absence under review, a badge the device did not recognise or a punch from outside the office. Blocking items must be cleared before you can freeze the period for payroll.

2.1 Work through the exceptions list

Exceptions lists every day that needs attention. Items that block the payroll freeze are separated from warnings you only need to review.

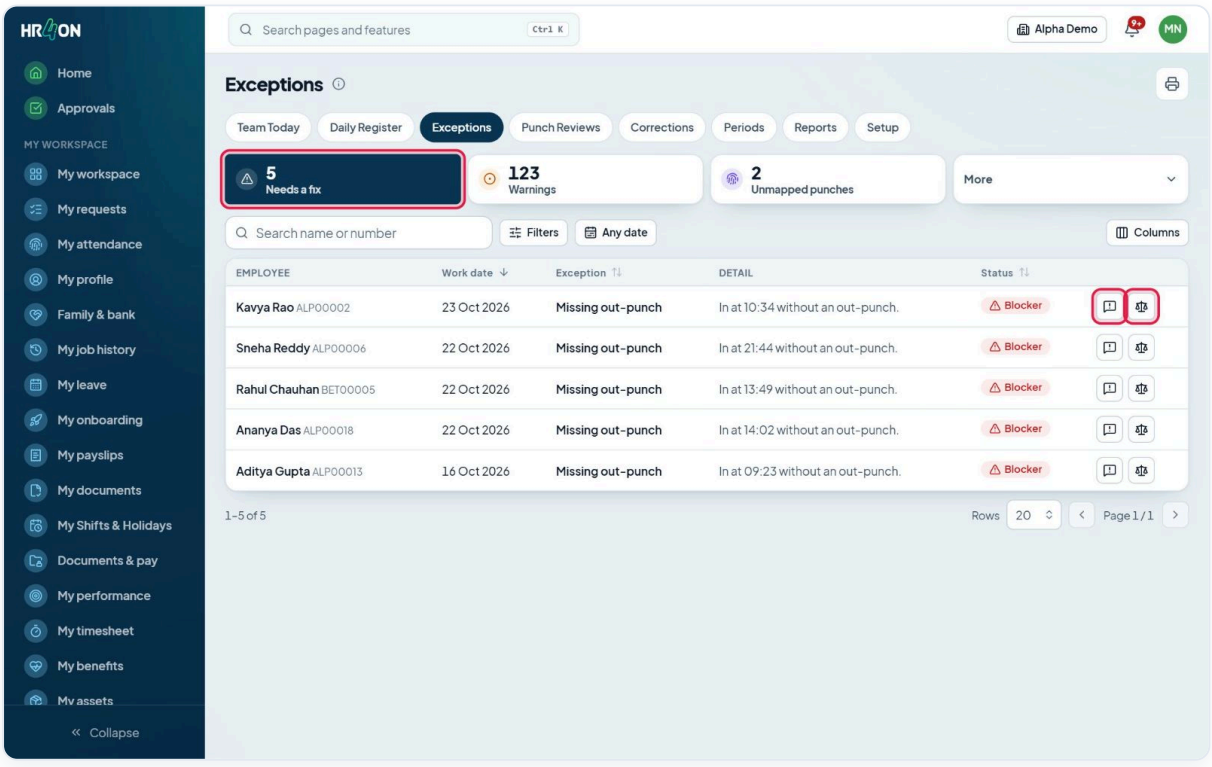
WHAT YOU SEE

- **Needs a fix**: missing punches and absences under review. These are **Blocker** items.
- **Warnings**: absences recorded as loss of pay, short hours and geofence flags. They do not block the freeze but are worth checking.
- **Unmapped punches**: device punches whose badge does not belong to anyone yet.
- Each row shows the person, work date, the exception (for example **Missing out-punch**) and a detail line such as "In at 10:34 without an out-punch."

HOW TO DO IT

1. Select the **Exceptions** tab. It opens on **Needs a fix**.
2. Narrow by date or team with **Filters** if the list is long.
3. Use the speech-bubble button (**Request evidence**) to ask the employee, or the scales button (**Decide**) to resolve the day yourself.
4. Select a row to open the attendance day first if you need to see the punches.

> **TIP**
> - A missing punch is best fixed by the employee raising a correction. Decide it yourself only when you have the evidence.



2.2 Decide an exception

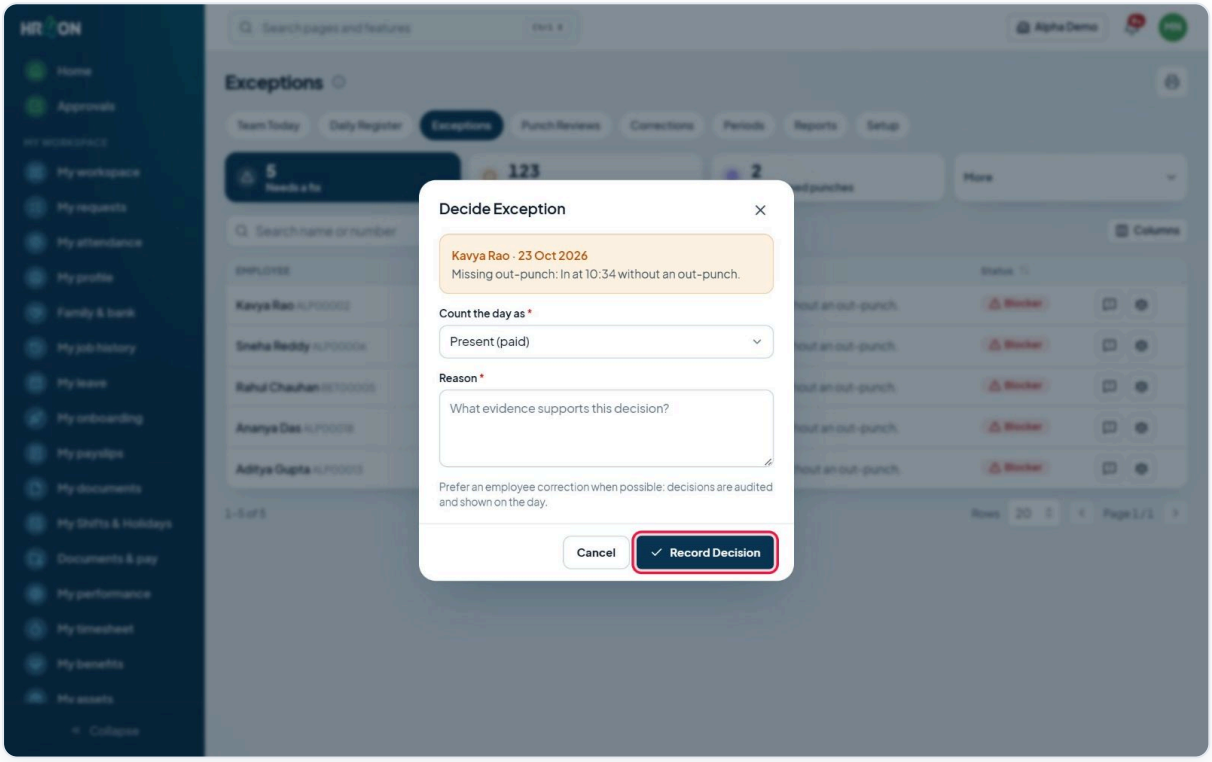
When you have evidence (a gate log, a manager's confirmation), you can decide how the day counts without waiting for the employee.

HOW TO DO IT

1. On the exception, select **Decide**.
2. Choose how to **Count the day as**, for example **Present (paid)** or half day.
3. Write the **Reason**: what evidence supports the decision.
4. Select **Record Decision**. The day is recalculated straight away.

GOOD TO KNOW

- Your decision and reason are kept in the day's history and the audit trail.
- You cannot decide days in a frozen period; use a correction, which becomes a payroll adjustment.



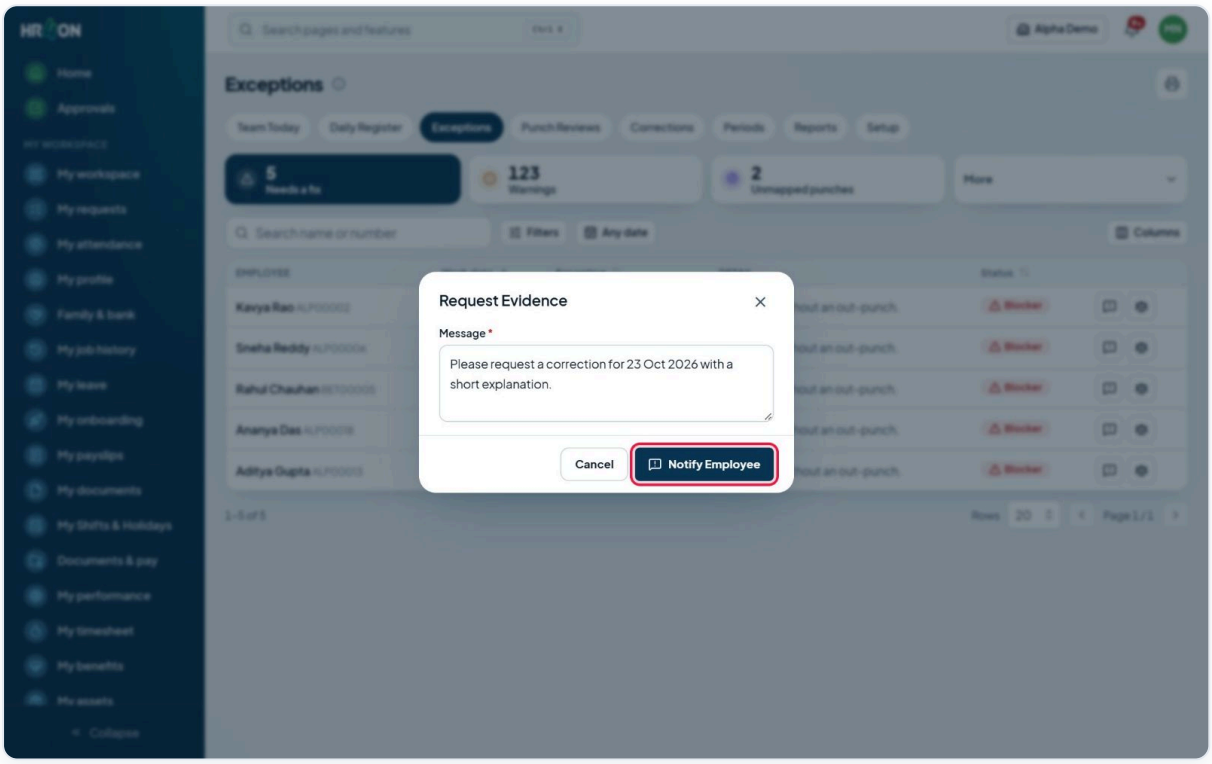
2.3 Ask the employee for evidence

Request Evidence sends the employee a message asking them to explain the day or raise a correction.

HOW TO DO IT

1. Select **Request evidence** on the row.
2. Edit the **Message** if you want to.
3. Select **Notify Employee**.

> **TIP**
> - The employee gets a notification and sees the request in their attendance calendar.



2.4 Map an unmapped device punch

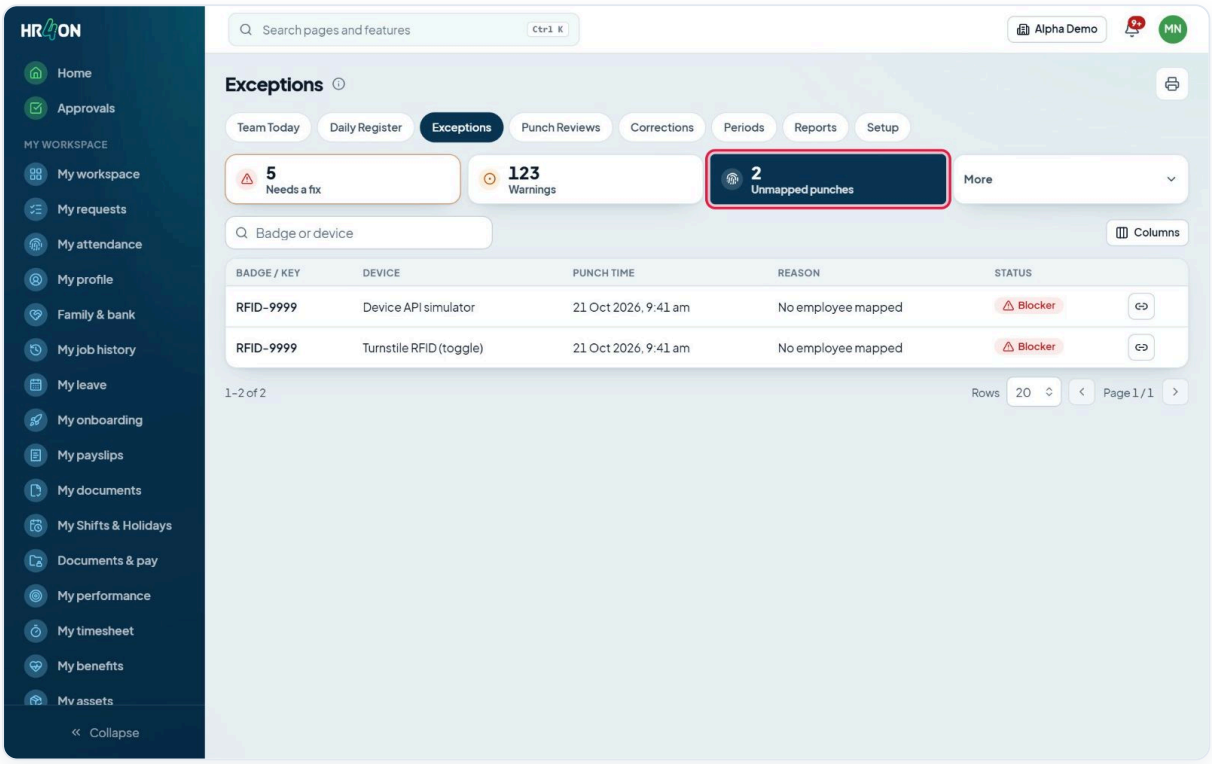
When a biometric or card reader sends a badge number HR4ON does not know, the punch waits in **Unmapped punches**. Map it to the right person so the day is calculated.

HOW TO DO IT

1. Select **Unmapped punches**.
2. Select the link button at the end of the row and use **Find employee** to search by name or number.
3. Tick **Remember this badge for future punches from this device** so the next punches map automatically.
4. Confirm to resolve the punch.

GOOD TO KNOW

- Unmapped punches inside a period block its freeze until they are mapped or dismissed.



2.5 Review correction requests

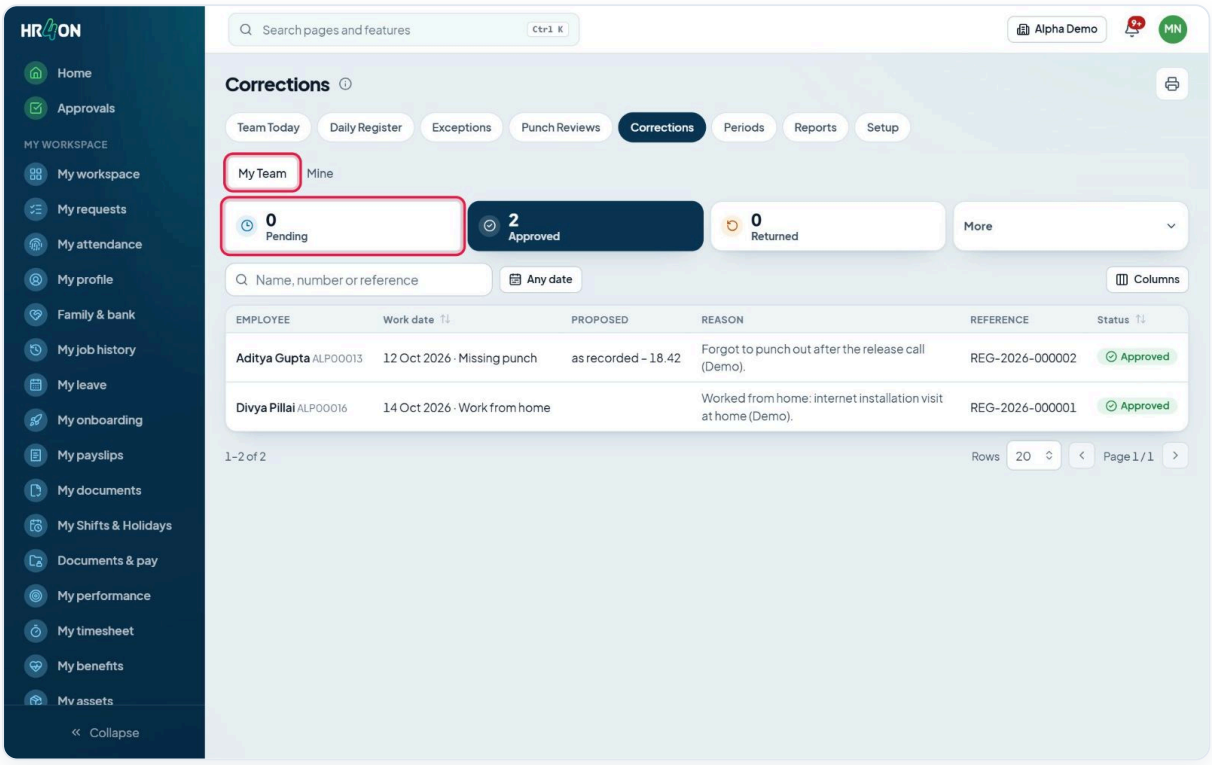
Employees raise a correction when a punch is missing or wrong, and an overtime request when they worked extra time. Their manager approves them; HR can see and act on all of them in **Corrections**.

WHAT YOU SEE

- **My Team** and **Mine**: requests you approve, and your own.
- **Pending**, **Approved**, **Returned** (and more under **More**): the status of each request.

HOW TO DO IT

1. Select the **Corrections** tab.
2. Choose a status.
3. Select a request to open it.



2.6 Decide a correction

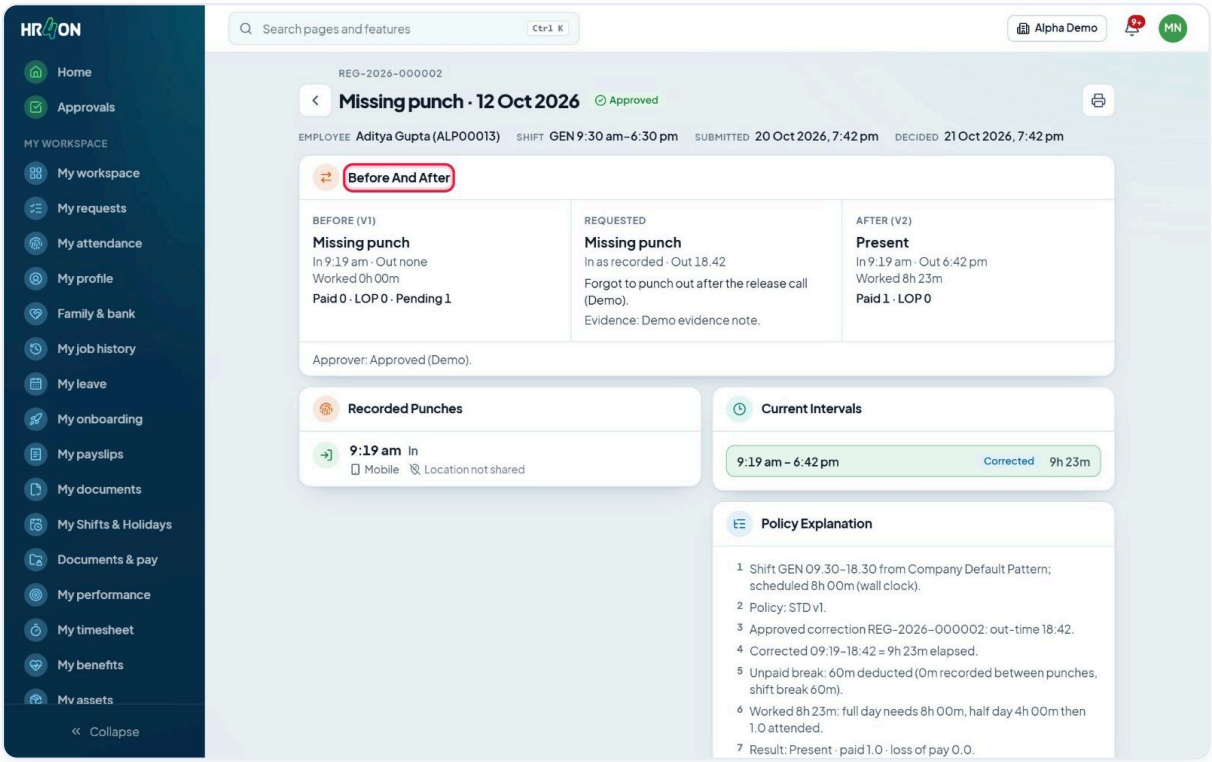
A correction shows the requested change side by side with what was recorded, so you can approve with confidence.

WHAT YOU SEE

- **Recorded Punches** and **Current Intervals**: what the system has now.
- **Before And After**: how status, paid days and worked time change if you approve.
- **Policy Explanation**: the rules used to recalculate.
- **After payroll freeze**: shown when the day is already frozen; approving creates an adjustment instead of changing the frozen snapshot.

HOW TO DO IT

1. Open the request.
2. Check the evidence and the before and after figures.
3. Select **Approve**, **Return** (to ask for changes) or **Reject** with a reason.



2.7 Review remote and selfie punches

Punches made from home, outside the office geofence, with low location accuracy or without a required selfie are queued in **Punch Reviews**. They count for now; you confirm or reject them.

WHAT YOU SEE

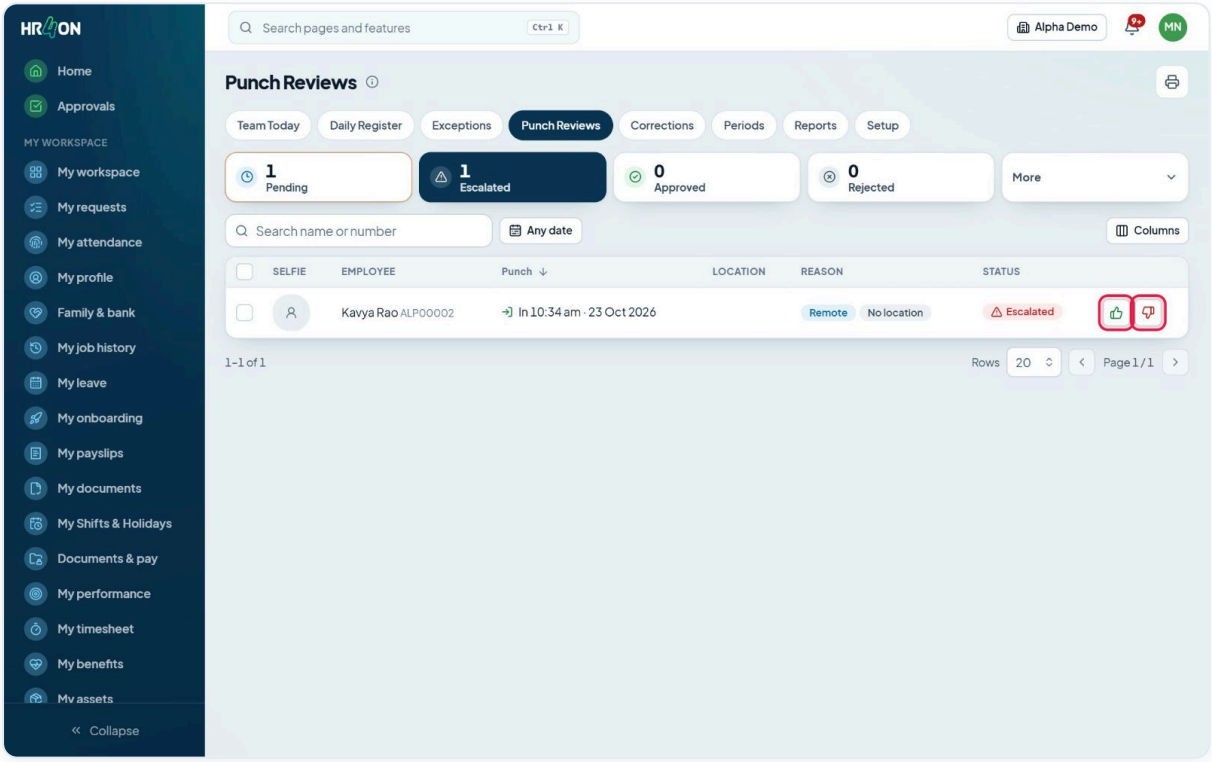
- **SELFIE**, **LOCATION** and **REASON** columns show why the punch is in the queue (for example **Remote**, **No location**).
- **Pending**: waiting for the manager. **Escalated**: not reviewed in time and passed to HR.
- **Open Map** shows where the punch was made, when a location was shared.

HOW TO DO IT

1. Select the **Punch Reviews** tab.
2. Check the selfie and location.
3. Select the thumbs-up button (**Approve**), or the thumbs-down button (**Reject**) and give a reason. You can tick several rows and decide them together.

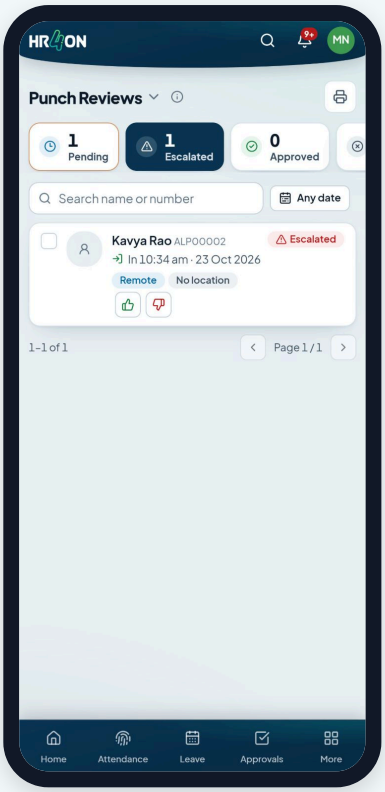
GOOD TO KNOW

- A rejected punch is removed from the day's attendance. The employee is notified and can request a correction.



ON YOUR PHONE

Punch reviews on a phone.



03 Attendance setup: policies, overtime and devices

Setup holds the rules attendance is calculated with and the devices punches come from. Changes here affect everyone, so make them carefully and preview first.

3.1 Understand attendance policies

An attendance policy sets grace times, full and half-day thresholds, rounding, break deduction, how absences are treated, overtime and selfie rules. Each company has a default policy, and a work location can have its own.

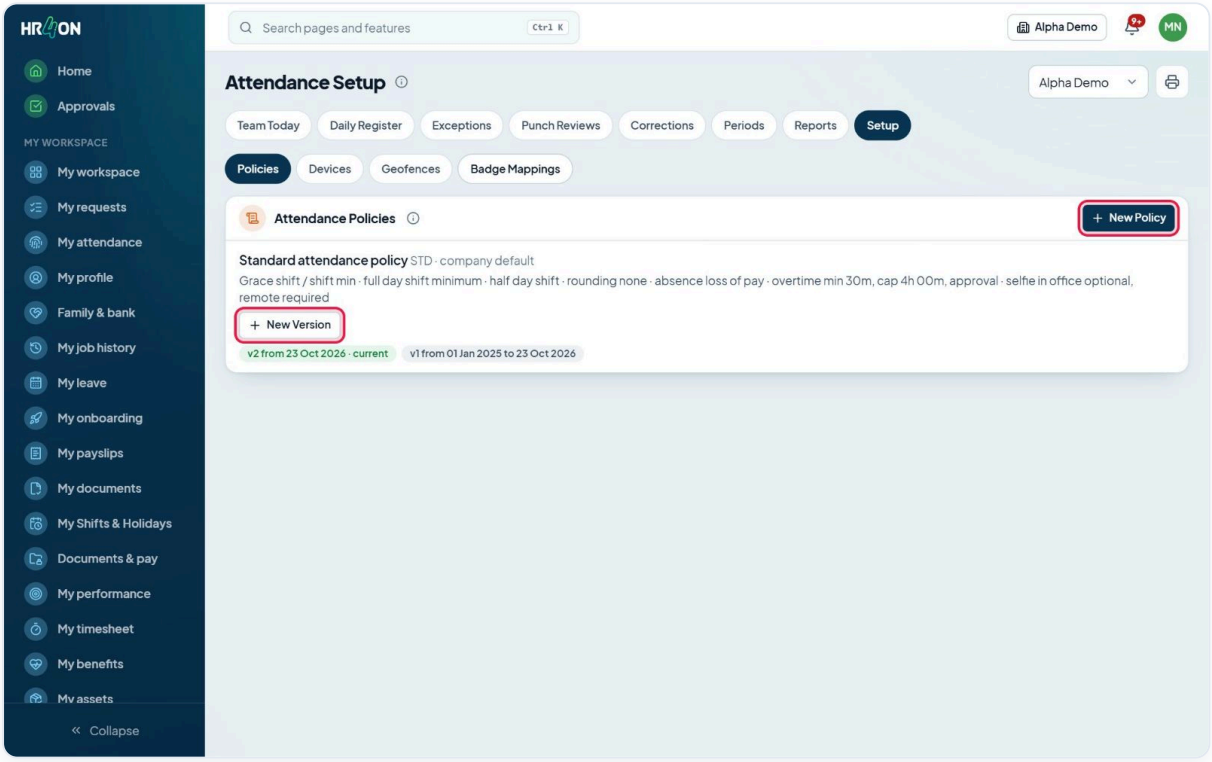
WHAT YOU SEE

- The summary line shows the rules in plain words, for example "overtime min 30m, cap 4h 00m, approval".
- Badges list the versions: **current**, **scheduled** (starts later) and past versions with their dates.

HOW TO DO IT

1. Select the **Setup** tab, then **Policies**.
2. Read the current version of each policy.

> **GOOD TO KNOW**
> - Policies are versioned by date. A new version never changes a frozen period.



3.2 Change a policy with a new version

To change a rule, create a new version from a date. Earlier days keep the version they were calculated with.

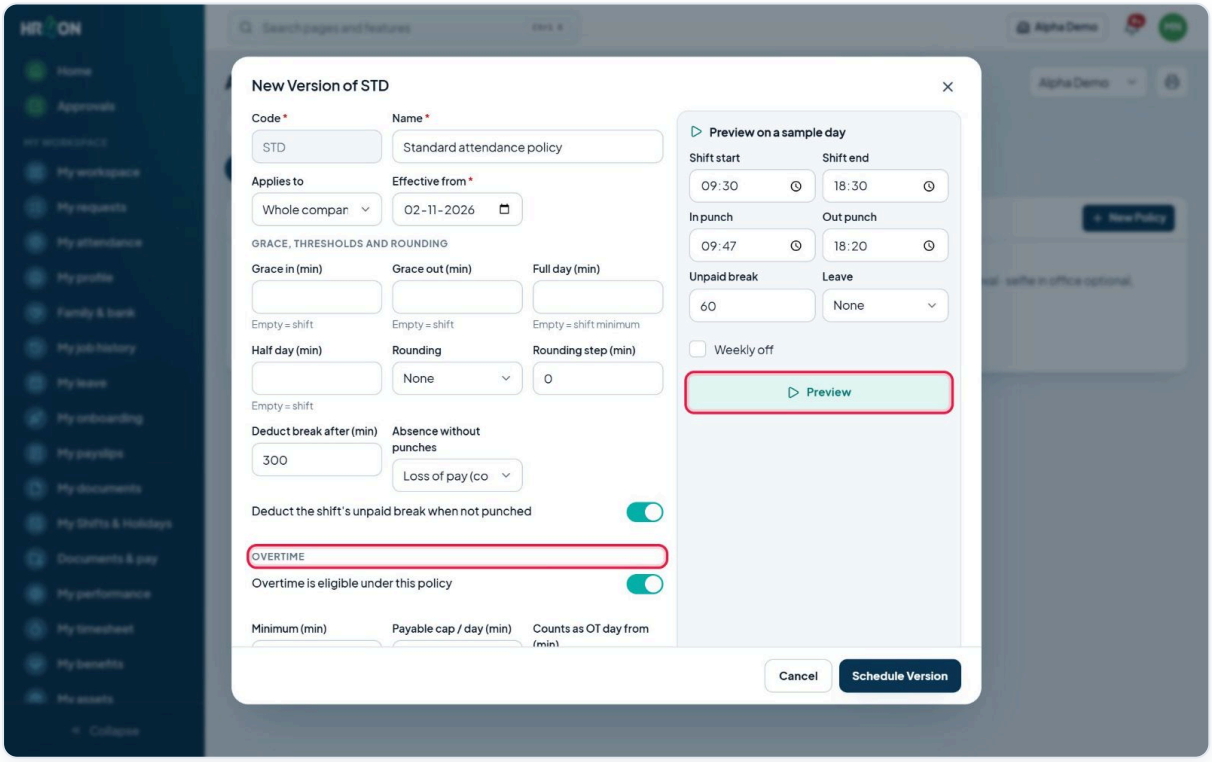
WHAT YOU SEE

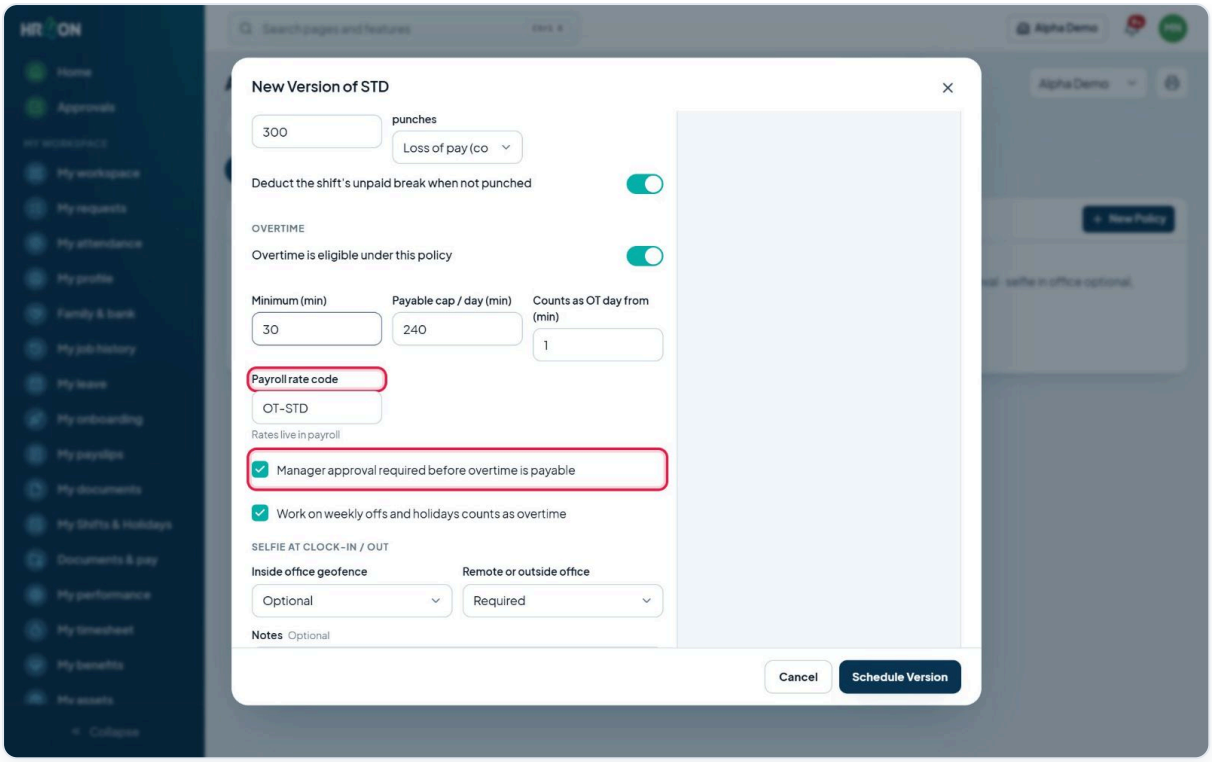
- **Grace, thresholds and rounding**: **Grace in (min)**, **Grace out (min)**, **Full day (min)**, **Half day (min)**, **Rounding**, **Rounding step (min)**, **Deduct break after (min)** and **Absence without punches** (loss of pay, or pending until reviewed).
- **Overtime**: switch on **Overtime is eligible under this policy**, then set the **Minimum (min)**, the **Payable cap / day (min)**, **Counts as OT day from (min)** and the **Payroll rate code**. Tick **Manager approval required before overtime is payable** and **Work on weekly offs and holidays counts as overtime** as your policy requires.
- **Selfie at clock-in / out**: **Off**, **Optional** or **Required**, separately for **Inside office geofence** and **Remote or outside office**.
- **Preview on a sample day**: enter shift times and punches, then select **Preview** to see the status, paid units, late minutes and overtime the new rules would give.

HOW TO DO IT

1. On the policy, select **New Version**.
2. Set **Effective from**.
3. Change the rules you need and fill in **Why this change**.
4. Try a sample day with **Preview**.
5. Select **Schedule Version**.

> **GOOD TO KNOW**
> - Overtime amounts are calculated in payroll from the rate code; attendance only counts the minutes and OT days.





The overtime and selfie rules further down the same form.

3.3 Night shifts and overtime days

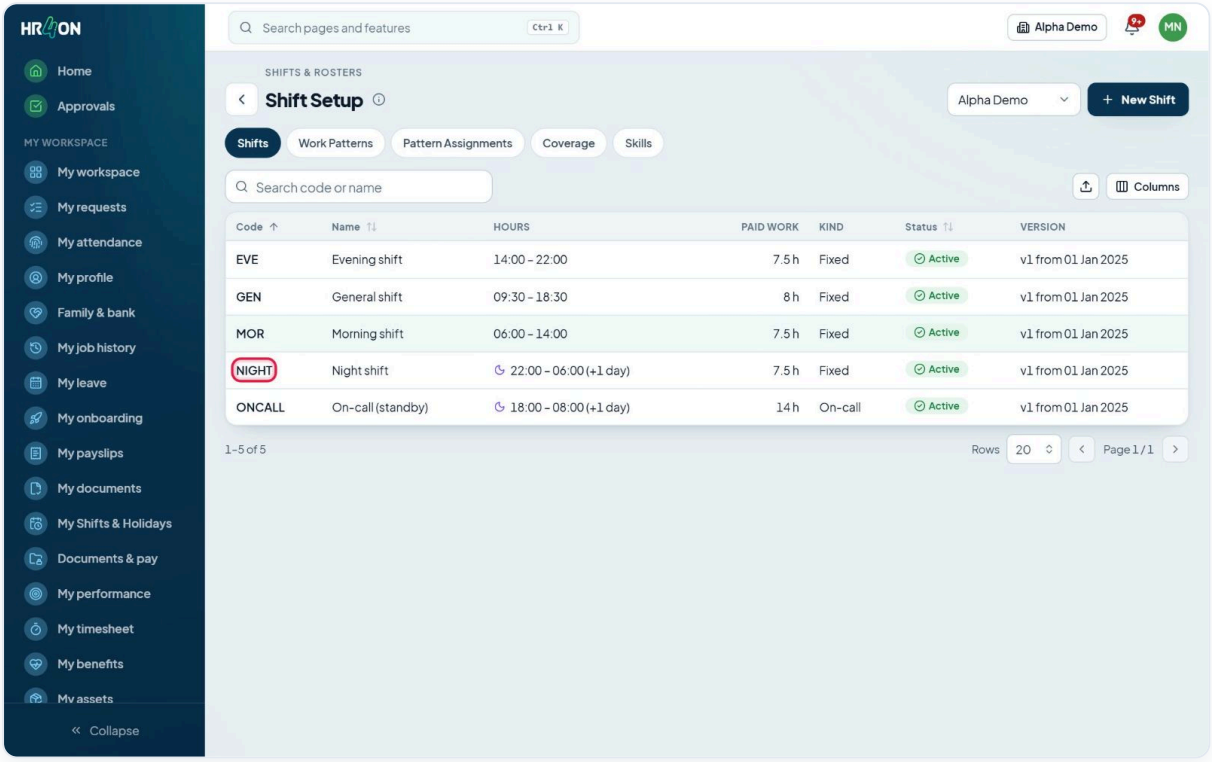
Night work is set on the shift, not on the attendance policy. A shift that ends after midnight is an overnight shift, and the attendance period counts night-shift days and overtime days for payroll allowances.

WHAT YOU SEE

- In **Shifts & Rosters** > **Shift setup**, an overnight shift shows its end time with "(+1 day)", for example **NIGHT 22:00 – 06:00 (+1 day)**.
- The shift's **Work date for overnight duty** decides which date the night belongs to, and the **Allowance input code** sends a night or shift allowance to payroll.
- On the attendance period, **Payable OT** shows overtime hours with the number of OT days and nights.

HOW TO DO IT

1. See "Set up shifts and night shifts" in the Shifts and rosters chapter for the shift form.



3.4 Manage punch devices

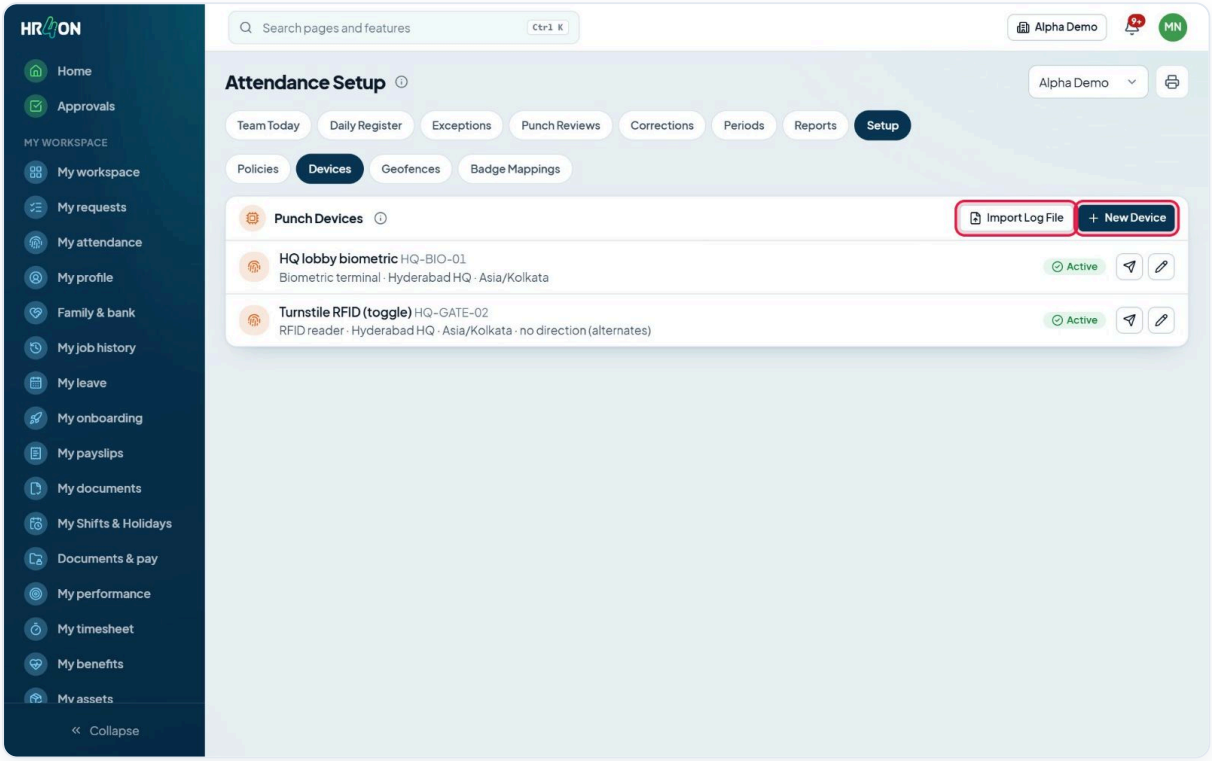
Devices lists the biometric terminals, RFID readers and face kiosks that send punches. Devices send only an identifier and a time; no fingerprints or face templates are stored.

WHAT YOU SEE

- Each device shows its type, location, time zone and when the last punch arrived.
- "no direction (alternates)" means the device does not report In or Out, so punches alternate.
- **Import Log File** loads a punch file exported from a device that is not connected.

HOW TO DO IT

1. Select the **Devices** tab.
2. Select **New Device** to add one: enter **Code**, **Name**, **Kind**, **Location** and **Time zone**.
3. Use **Edit device** to change a device or set it **Inactive**.



3.5 Connect a Matrix COSEC biometric system

HR4ON connects to Matrix COSEC face, finger and card terminals. Add the device with the kind **Matrix COSEC (face / finger / card)**, then open its connection settings.

WHAT YOU SEE

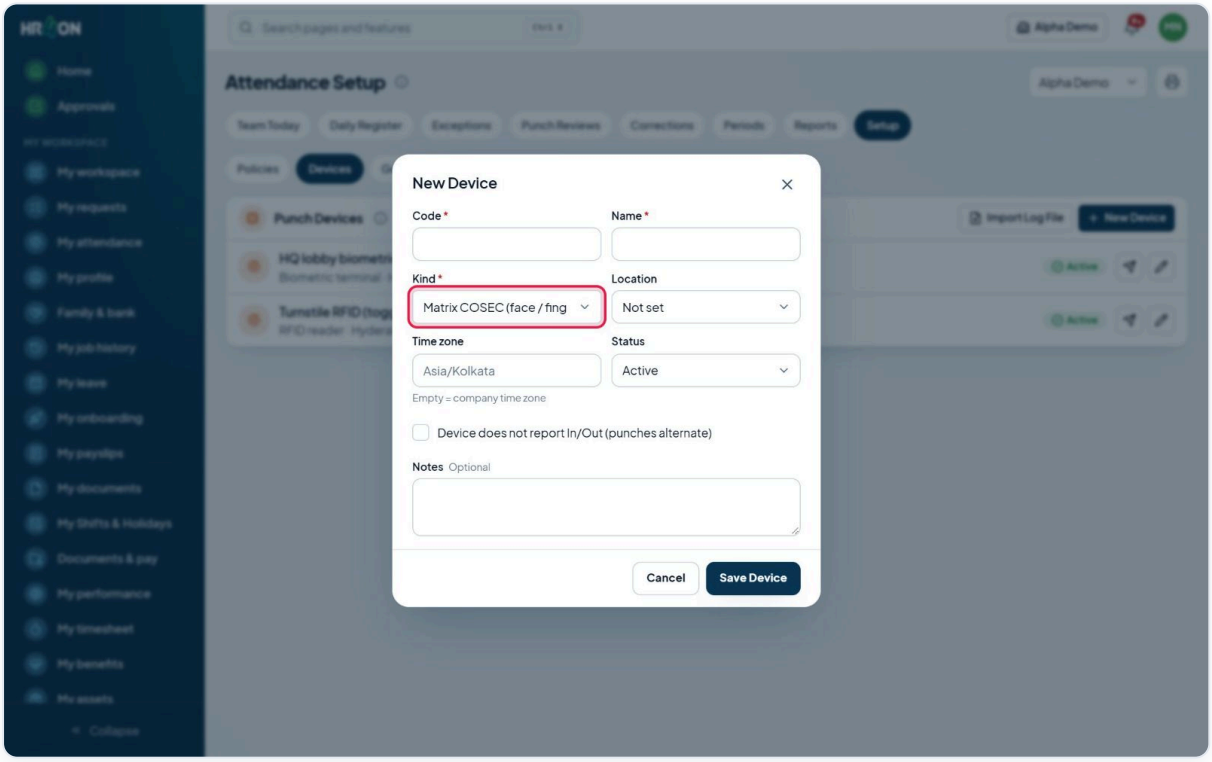
- **Connection mode**: **Pull from Server** (HR4ON reads new events from your COSEC server every few minutes) or **Device Pushes** (the device sends events to HR4ON; you enter the **Third-party server URL (enter on the device)** and **Device key** shown on the screen into the device).
- **Test Connection** checks the settings; **Sync Now** reads events straight away.
- **Recent syncs** shows each sync and how many events it brought in.
- **Unmapped COSEC users** lists COSEC user ids that are not yet linked to an employee. Link them with **Find employee**.
- **Import COSEC Export** loads an event file exported from COSEC.

HOW TO DO IT

1. On **Devices**, select **New Device** and choose the kind **Matrix COSEC (face / finger / card)**.
2. Save the device, then select its **Matrix COSEC connection** button.
3. Choose the connection mode and fill in the details from your COSEC administrator.
4. Select **Test Connection**, then **Save Connection**.

GOOD TO KNOW

- The COSEC password is stored securely and never shown again after you save it.



Adding a Matrix COSEC terminal.

3.6 Set up geofences

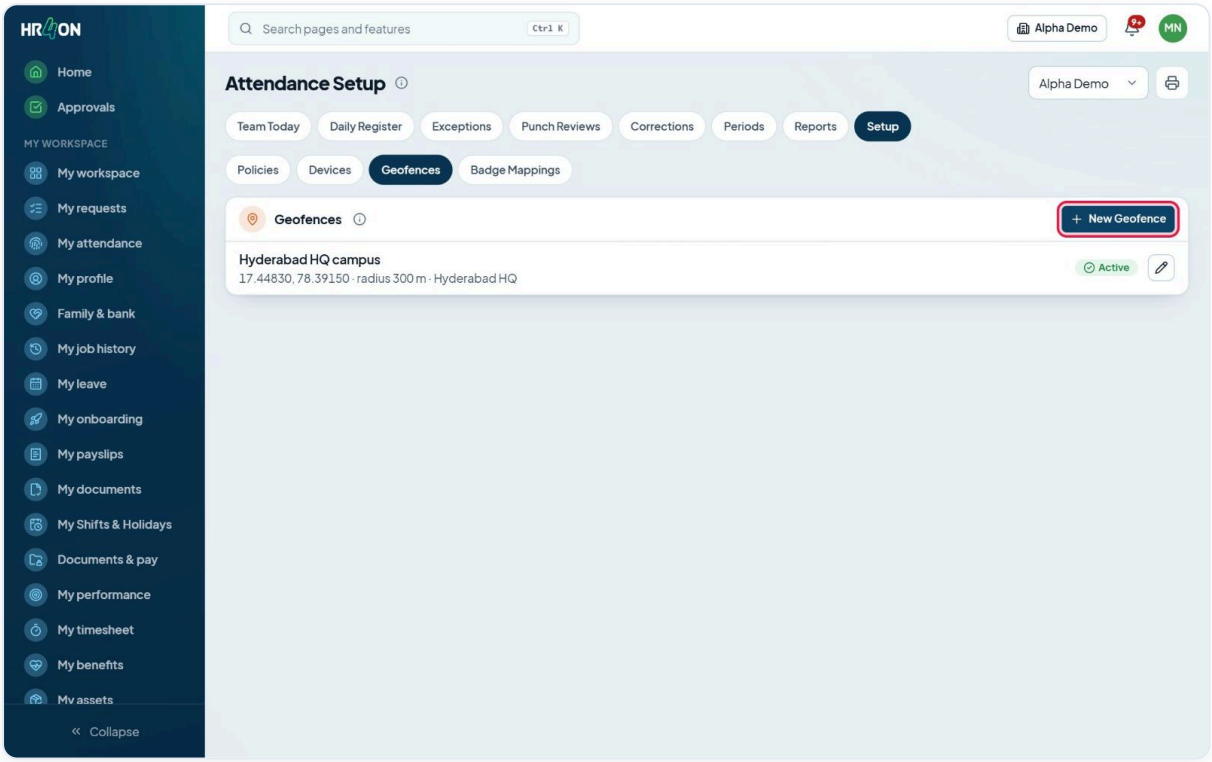
A geofence is a circle around an office. When location capture is on, punches inside the circle count as in-office; punches outside are flagged for review.

HOW TO DO IT

1. Select the **Geofences** tab, then **New Geofence**.
2. Enter the **Name**, **Work location**, **Latitude**, **Longitude** and **Radius (m)**. **Use My Location** fills in where you are standing.
3. Select **Save Geofence**.

GOOD TO KNOW

- Location capture, flag or block mode, the correction window and freeze approval are company switches in **Settings** under Attendance.

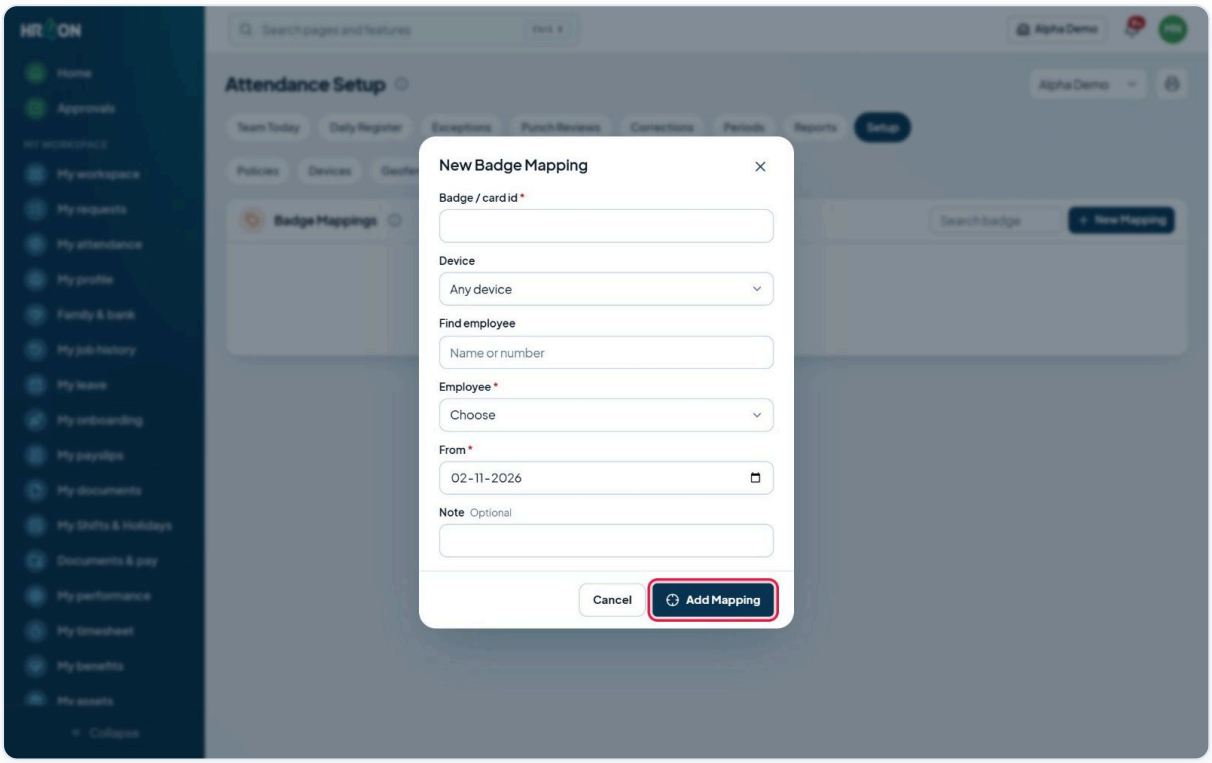


3.7 Map badges to employees

Devices are matched by employee number automatically. When a device sends a badge or card id instead, add a badge mapping.

HOW TO DO IT

1. Select the **Badge Mappings** tab, then **New Mapping**.
2. Enter the **Badge / card id**, choose the **Device** (or **Any device**) and find the employee.
3. Set **From** and select **Add Mapping**.
4. To stop a mapping (a lost card), select **End mapping** and give a reason. Past punches keep their mapping.



The New Badge Mapping form.

04 Attendance periods and the hand-over to payroll

At the end of each month you validate the attendance period, clear the blocking items and freeze it. The frozen snapshot is what payroll pays from.

4.1 See the attendance periods

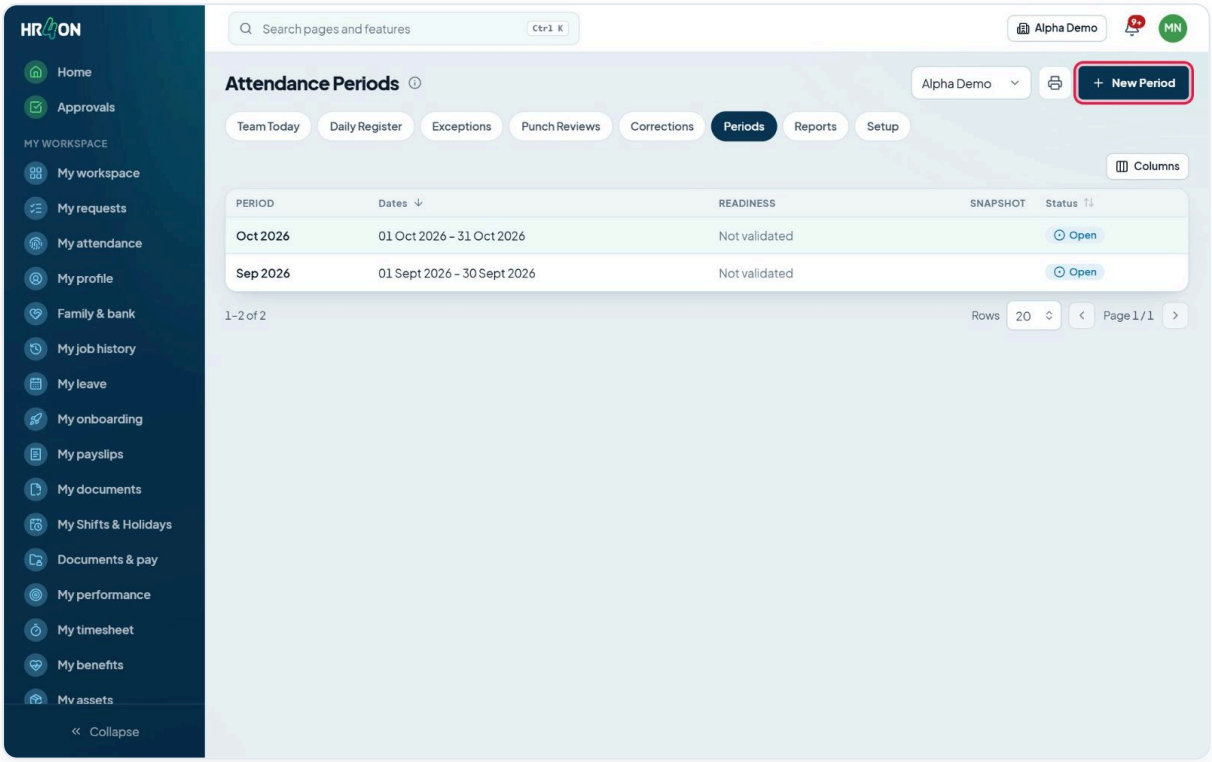
Periods lists the monthly attendance periods for each company with their readiness and status.

WHAT YOU SEE

- **READINESS**: whether the period has been validated, and how many blockers remain.
- **SNAPSHOT**: the frozen version payroll uses.
- Statuses: **Open**, **Freeze pending** (waiting for payroll approval), **Frozen**, **Reopen pending**.

HOW TO DO IT

1. Select the **Periods** tab.
2. Select a period to open it. Use **New Period** if a month is missing.



4.2 Review readiness and validate

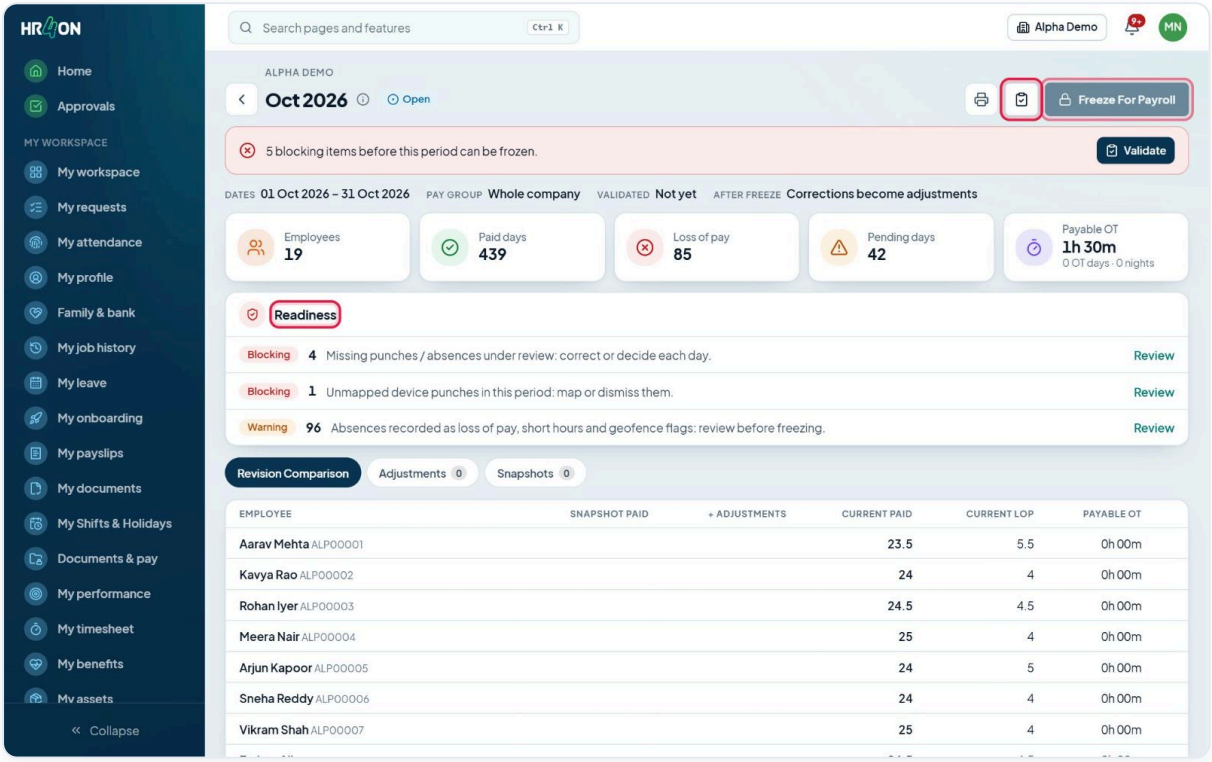
The period page shows the totals for the month and a readiness list of everything that must be done before payroll.

WHAT YOU SEE

- Totals: **Employees**, **Paid days**, **Loss of pay**, **Pending days** and **Payable OT** (with OT days and nights).
- **Readiness** groups items as **Blocking** or **Warning**, each with a **Review** link straight to the matching exceptions.
- The table compares each person's snapshot with their current paid days, loss of pay and payable overtime.

HOW TO DO IT

1. Open the period.
2. Select **Validate** to check the period again after fixing items.
3. Use each **Review** link to clear blockers, then validate again.



4.3 Freeze the period for payroll

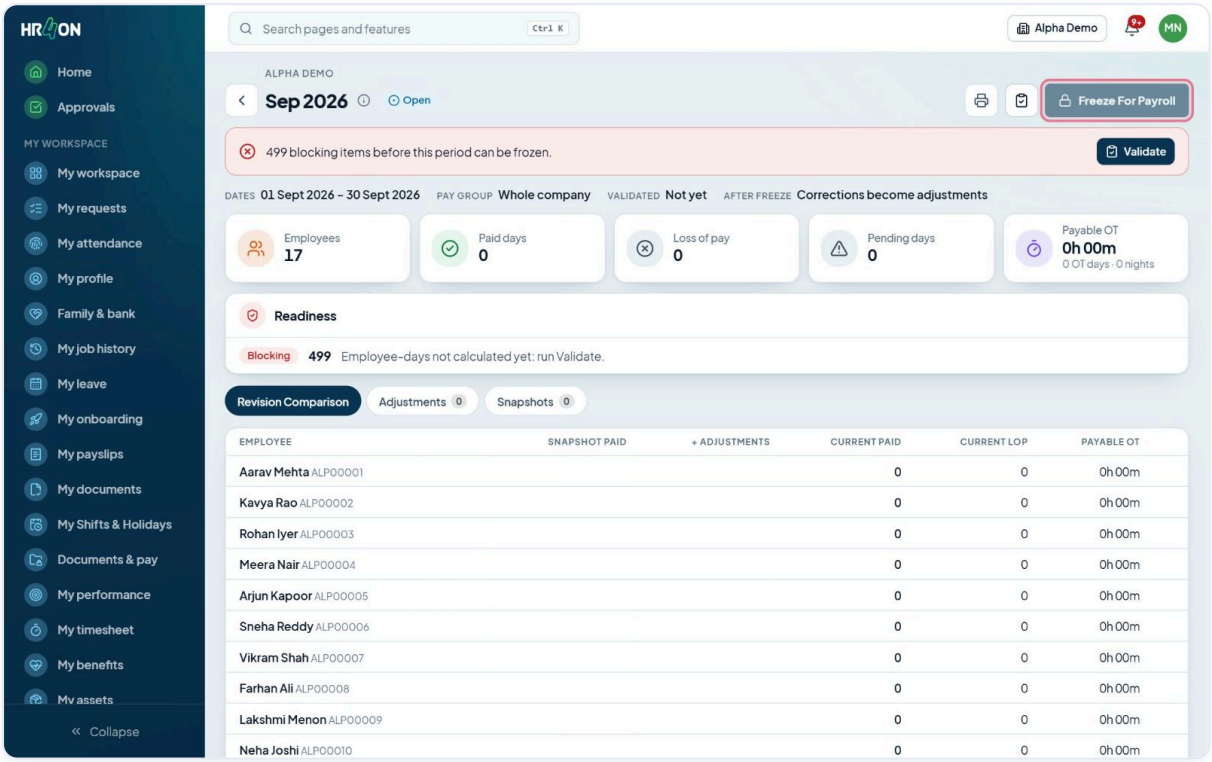
Freezing takes an immutable snapshot of paid days, loss of pay and overtime for every person, and sends it to payroll.

HOW TO DO IT

1. Clear every blocking item. **Freeze For Payroll** stays disabled until there are none.
2. Select **Freeze For Payroll** and confirm with **Freeze**.
3. The period waits as **Freeze pending** until a payroll checker approves it, then shows **Frozen**.

GOOD TO KNOW

- Freezing needs a payroll checker's approval (four eyes). The person who requested the freeze cannot approve it.
- After the freeze, approved corrections appear under **Adjustments** for a later payroll; the snapshot itself never changes.



A period that has not been calculated and validated yet: Freeze For Payroll stays disabled until Validate shows no blocking items.

4.4 Late corrections, snapshots and reopening

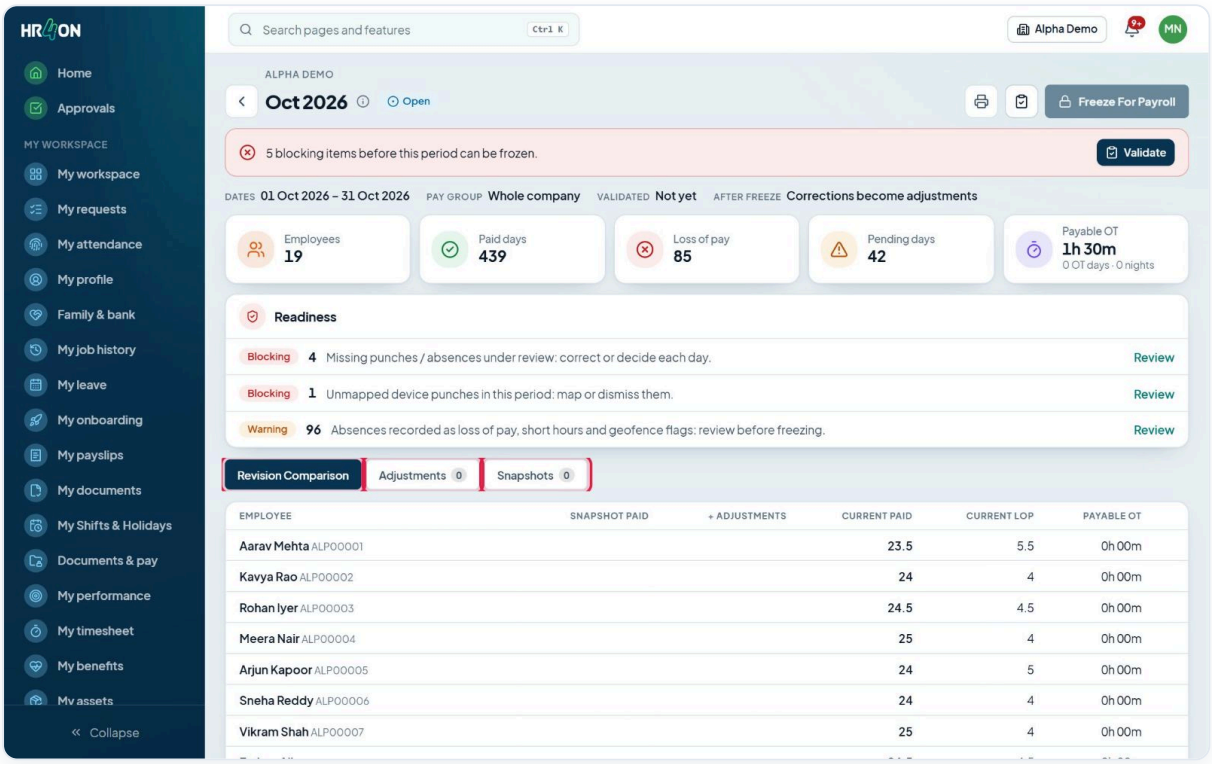
The tabs under the period show what changed after the freeze.

WHAT YOU SEE

- **Revision Comparison**: snapshot against current figures per person; **Differs** marks people whose days have changed.
- **Adjustments**: corrections approved after the freeze, passed to payroll as adjustments.
- **Snapshots**: every frozen version, including superseded ones.

HOW TO DO IT

1. To change a frozen period, select **Reopen** and give a reason, then confirm with **Request Reopen**.
2. After payroll approves, the days become editable. Freeze again to create a new snapshot version.



05 Leave requests and approvals

Leave under **Time & attendance** is HR's leave workspace: every request in your scope, the team calendar, payroll inputs and administration.

5.1 See all leave requests

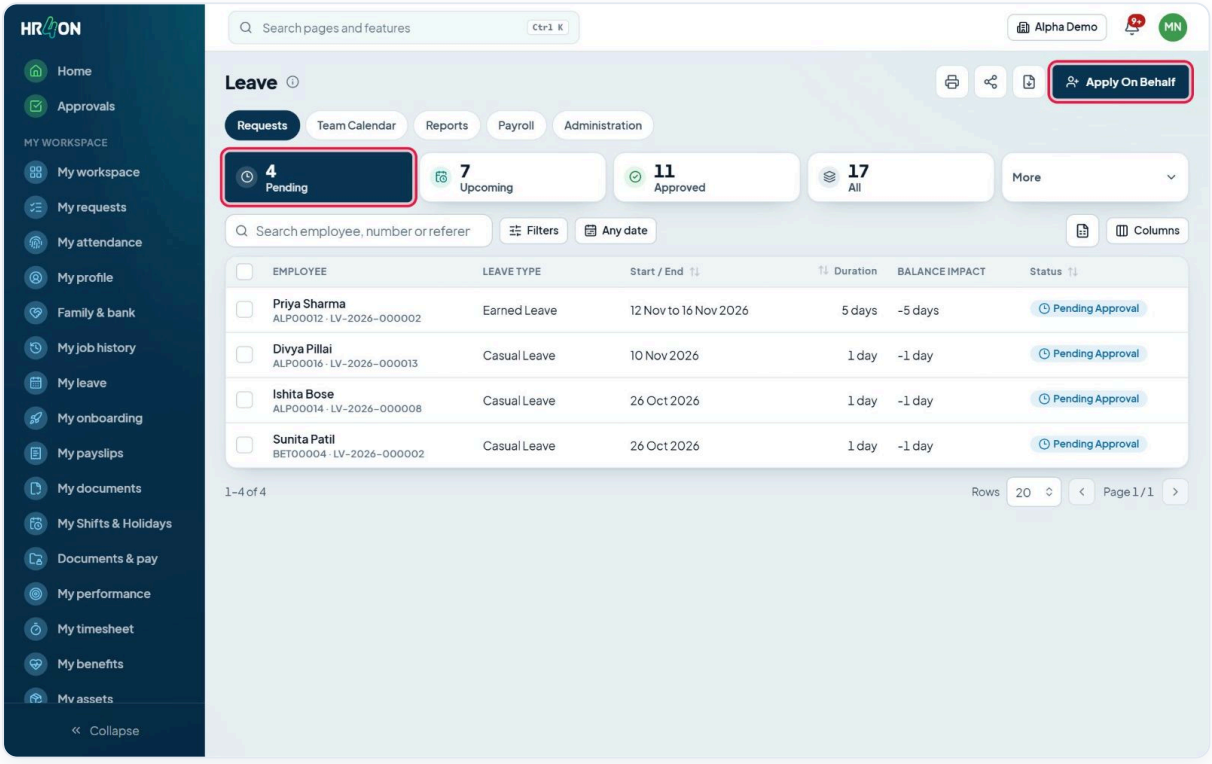
Requests lists leave in your scope with the balance impact of each request.

WHAT YOU SEE

- **Pending**, **Upcoming**, **Approved** and **All** (more under **More**) filter by status.
- **BALANCE IMPACT** shows how many days the request takes from the balance.
- Statuses: **Pending Approval**, **Approved**, **Rejected**, **Returned**, **Withdrawn**, **Cancelled**.

HOW TO DO IT

1. Open **Leave**.
2. Choose a status tile, or use **Filters** and the date chip.
3. Select a request to open it.
4. Use **Export** or **Download PDF** for a list.



5.2 Open a leave request

The request page shows everything an approver needs: the days charged, the balance, team coverage and the approval route.

WHAT YOU SEE

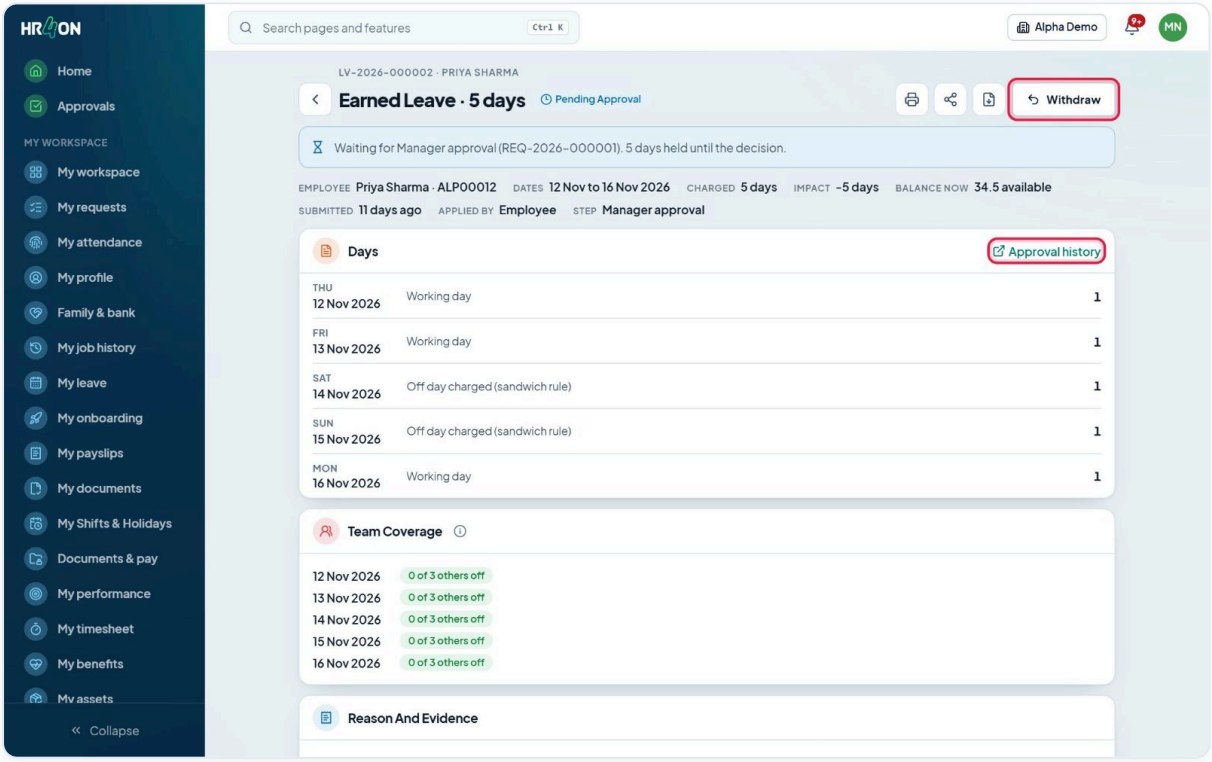
- **Days**: each date with how it is charged. "Off day charged (sandwich rule)" means a weekend between leave days counts.
- **Team Coverage**: how many others in the team are off on the same dates. Confidential leave types are never shown.
- **Reason And Evidence** and **Ledger Entries**: why the leave was taken and the days held on the balance.
- **Approval history**: who has decided so far and who is next.

HOW TO DO IT

1. Open the request.
2. If you are the current approver, select **Approve**, **Return** or **Reject**.
3. Select **Approval history** to see the route, or **Full ledger** (under **Ledger Entries**) to see the person's balance history.
4. Use **Withdraw** to withdraw a pending request on the employee's behalf. The held days are released immediately.

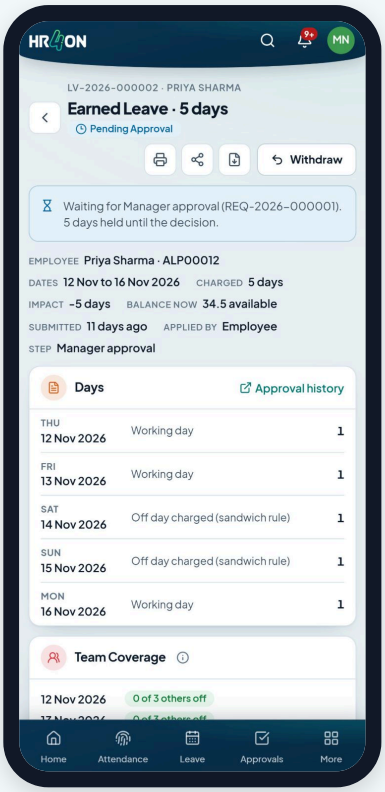
GOOD TO KNOW

- Pending days are held on the balance until the decision, so two requests cannot spend the same days.



ON YOUR PHONE

A leave request on a phone.



5.3 Approve leave from your approvals inbox

Leave goes first to the employee's manager. Leave that also needs HR approval (long leave, special leave types) then arrives in your **Approvals**, together with everything else waiting for you.

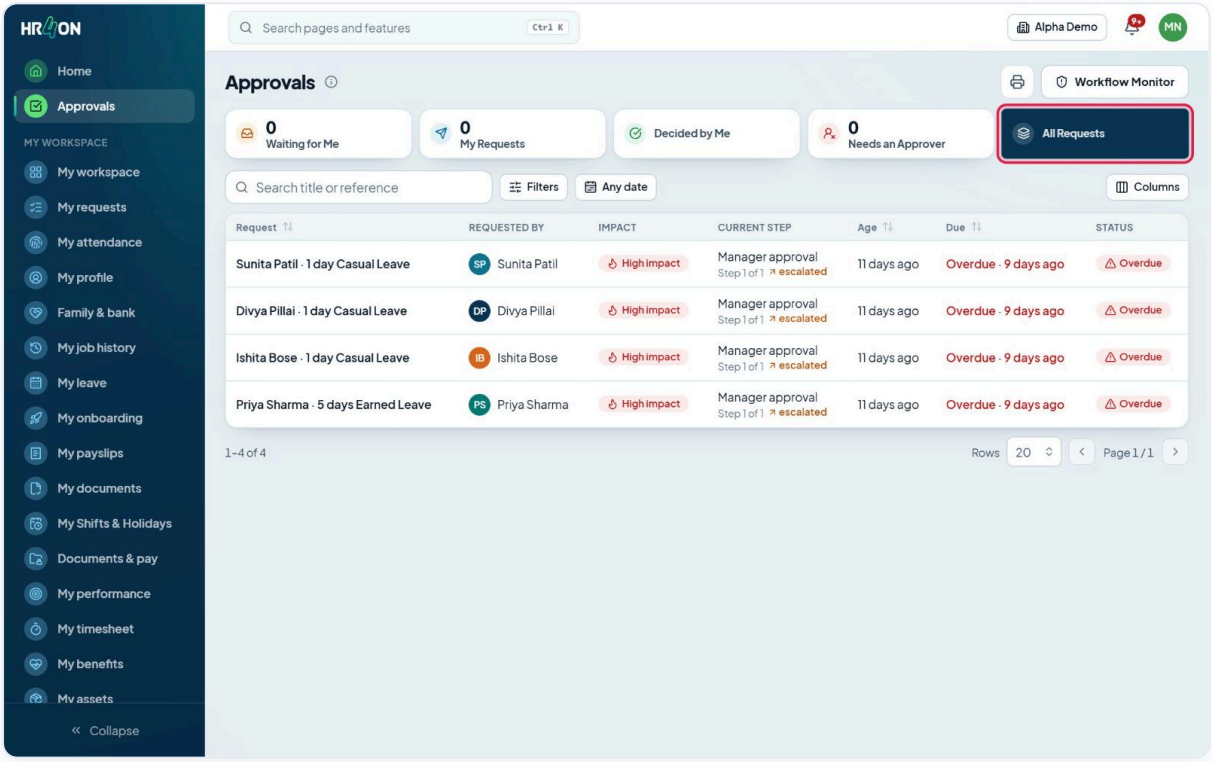
WHAT YOU SEE

- **Waiting for Me**: decisions you need to make.
- **My Requests** and **Decided by Me**: your own requests and your past decisions.
- **All Requests**: every approval in progress in your scope, so you can see where a request is stuck. **Workflow Monitor** shows the same for administrators.

HOW TO DO IT

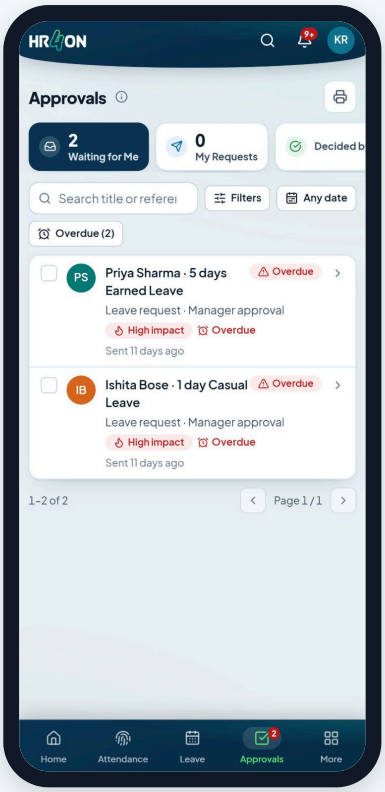
1. Open **Approvals**.
2. Select **All Requests** to follow everything in progress, or **Waiting for Me** for your own decisions.
3. Select an item to see its details, then approve, return or reject. The employee is notified.

> **TIP**
> - Policies decide when HR approval is needed, for example above a number of days. See "Create or change a leave policy".



ON YOUR PHONE

Approvals on a phone: here Kavya Rao, Priya's manager, sees the leave request waiting for her.

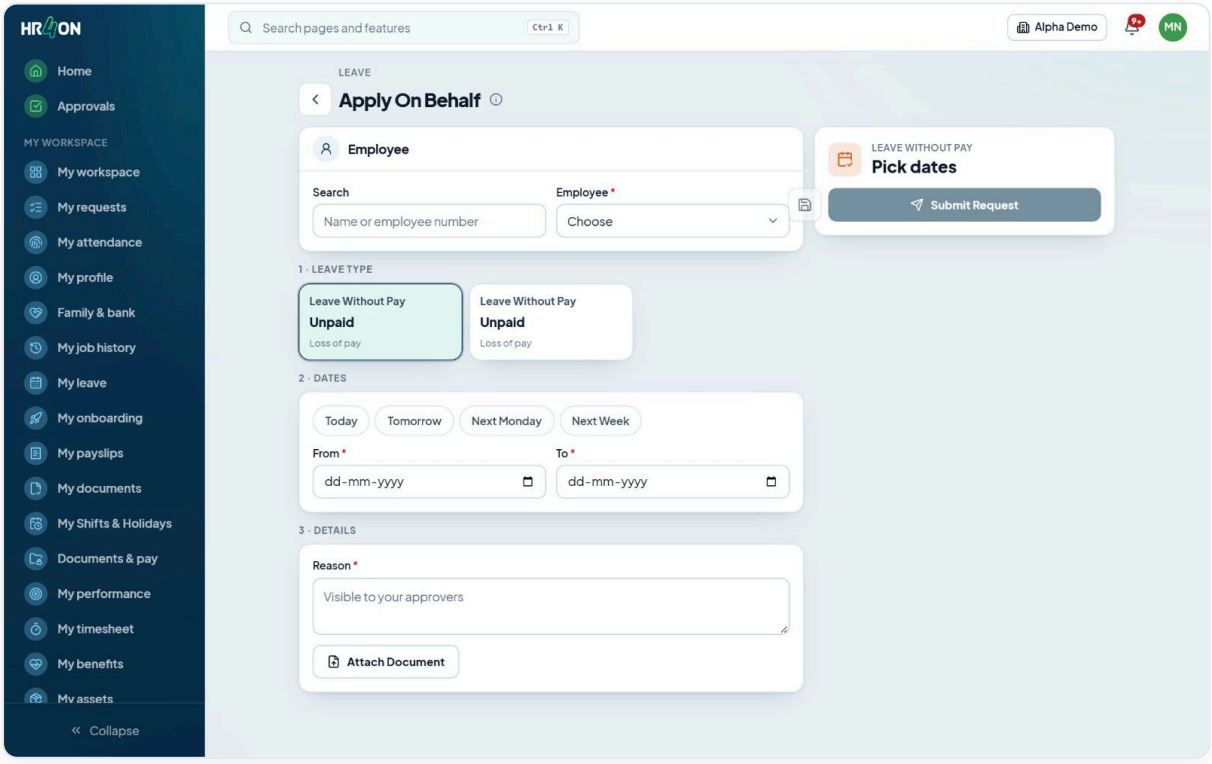


5.4 Apply leave on behalf of an employee

Use this when an employee cannot apply themselves, for example during a hospital stay.

HOW TO DO IT

1. On **Leave**, select **Apply On Behalf**.
2. Choose the employee, then fill in the leave type, dates, half days and reason as the employee would.
3. Submit. The request follows the normal approval route and shows "Applied by" HR.



5.5 Check the team calendar

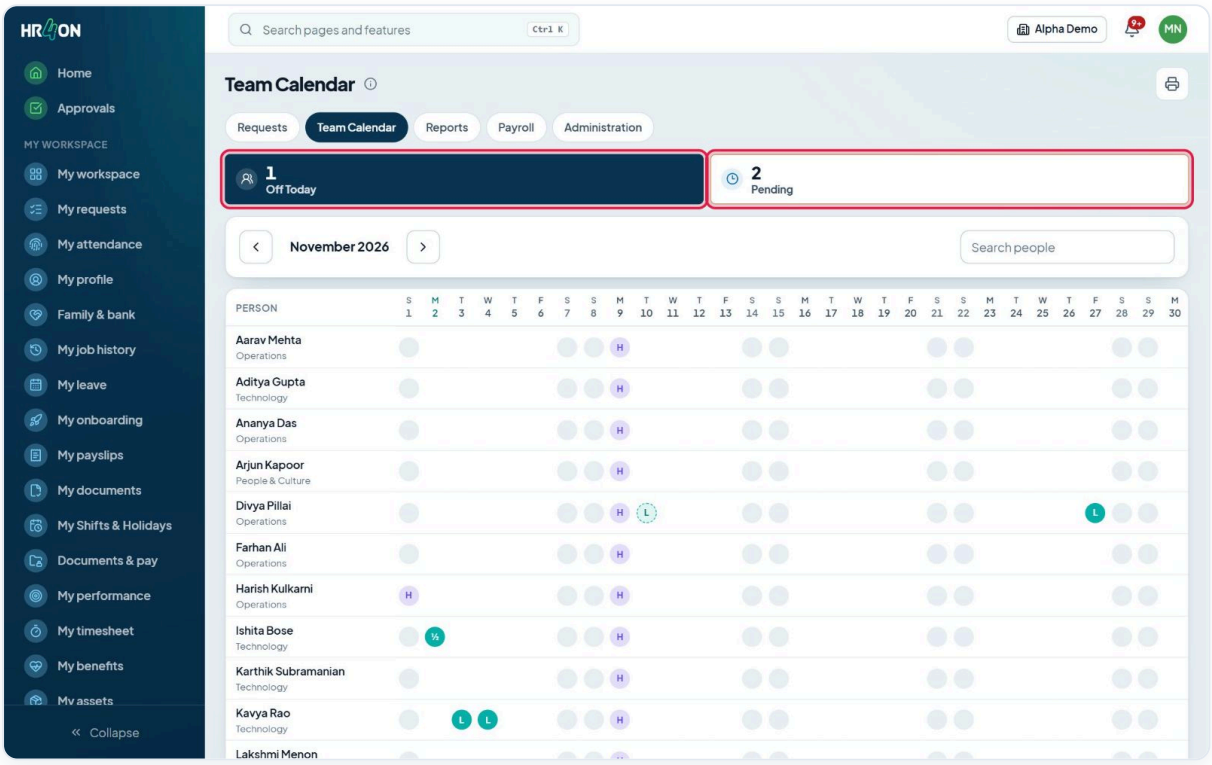
The team calendar shows everyone's leave, pending requests, holidays and weekly offs for a month, so you can spot clashes.

WHAT YOU SEE

- `L` leave, a lighter mark for pending, `H` holiday, `½` half day.
- The bottom row counts how many people are off each day.

HOW TO DO IT

1. Select **Team Calendar**.
2. Move between months with the arrows.
3. Select a leave mark to open the request.



06 Leave types and policies

Leave types say what kinds of leave exist; policies say how each type is earned, charged, carried forward and encashed. Both live under **Administration** in Leave.

6.1 Manage leave types

A leave type is a kind of leave, such as Casual, Sick, Earned, Comp-off or Leave Without Pay, for one company.

WHAT YOU SEE

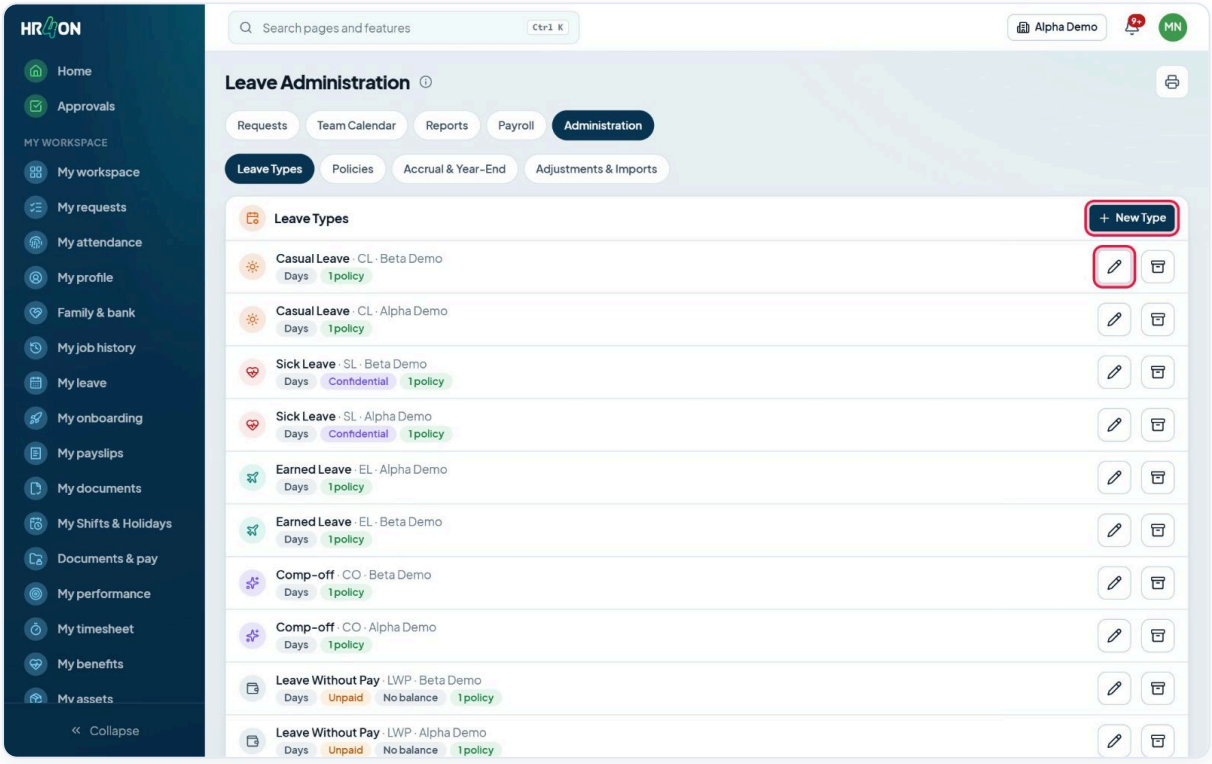
- Badges show the settings: **Days** or **Hours**, **Confidential** (team calendars show only "On leave"), **HR approval**, **Unpaid** (reported to payroll as loss of pay), **No balance** and any gender restriction.
- **1 policy** shows how many policies use the type.

HOW TO DO IT

1. Open **Leave**, then **Administration**. **Leave Types** opens first.
2. Select **New Type** to add one: **Code**, **Name**, **Category**, **Unit** and the switches for **Paid leave**, **Keeps a balance**, **Confidential**, **Always needs HR approval** and **Half days allowed**.
3. Use **Edit type** to change it, or **Retire type** to stop new requests.

GOOD TO KNOW

- A retired type cannot be used for new requests; its history and balances stay.

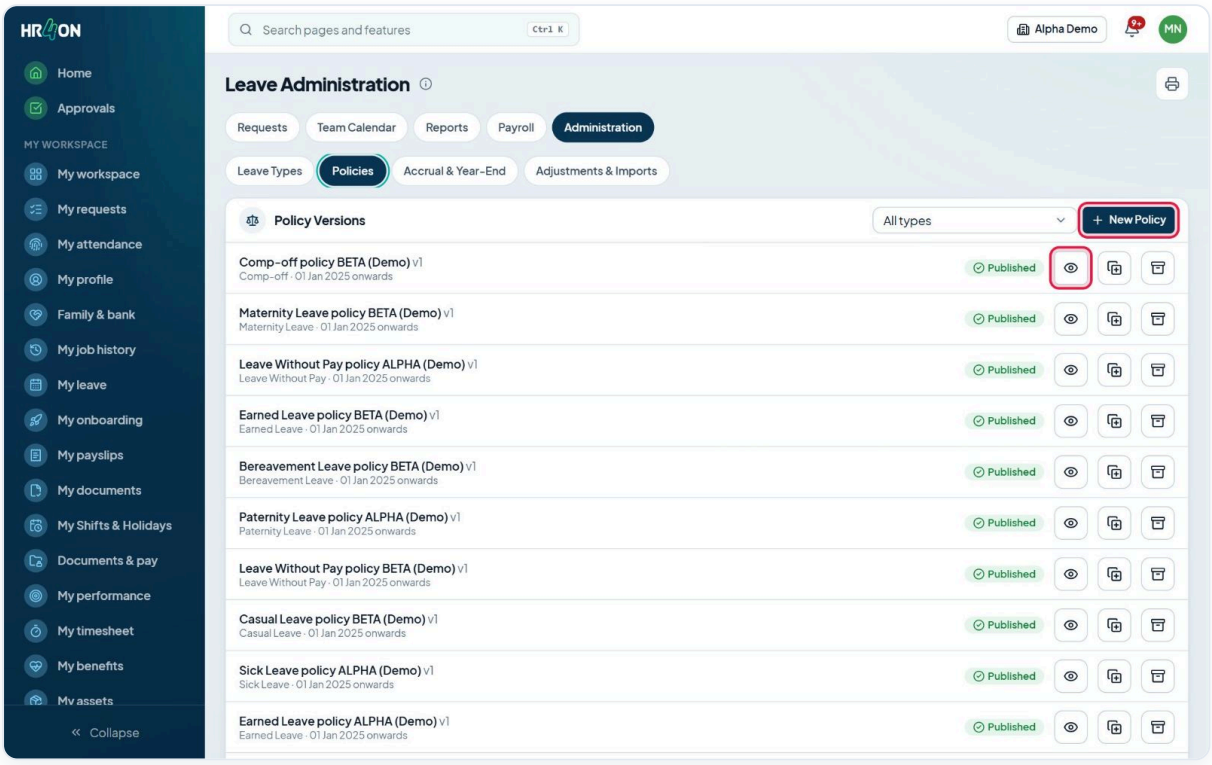


6.2 Read a leave policy

The **Policies** tab lists each policy version by leave type with its status and dates.

HOW TO DO IT

1. Select the **Policies** tab.
2. Filter by leave type if you need to.
3. Select **View rules** to see every rule of a version.



6.3 Create or change a leave policy

A policy is created as a draft, checked and then published. Published versions never change: to change rules, create a new version from a date.

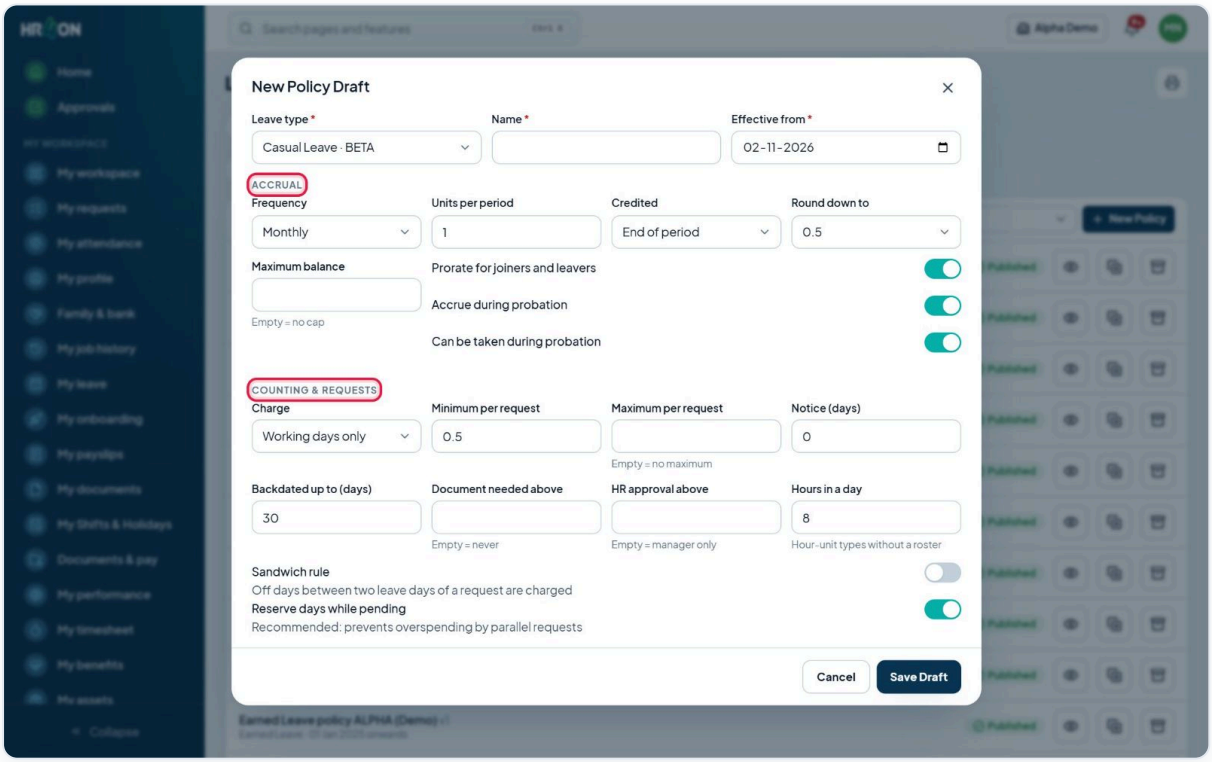
WHAT YOU SEE

- **Accrual**: **Frequency** (monthly, quarterly, per leave year, service anniversary or granted by HR), **Units per period**, when it is **Credited**, rounding and **Maximum balance**, and the probation and proration switches.
- **Counting & requests**: **Charge** working days only or calendar days, minimum and maximum per request, **Notice (days)**, **Backdated up to (days)**, **Document needed above**, **HR approval above**, the **Sandwich rule** and **Reserve days while pending**.
- **Year end, encashment & negative balance**: **Carry forward up to**, expiry of carried units and comp-off, **Allow negative balance** with its limit, **Encashment allowed**, **Encash up to per year**, **Keep at least after encashing** and **Encashable at exit (F&F, days)**.
- **Policy text shown to employees**: plain words employees see when they apply.

HOW TO DO IT

1. Select **New Policy**, or **New version from a date** on a published policy.
2. Fill in the rules and select **Save Draft**.
3. Check the draft with **View rules**, then select **Publish**.

> **GOOD TO KNOW**
> - Demo policy values are proposals. Check every value against the law and your company policy before publishing.



07 Balances, accrual, adjustments and year-end

Leave balances are never edited directly. Every credit, debit, hold and correction is a ledger entry, so you can always explain a balance.

7.1 Check leave balances

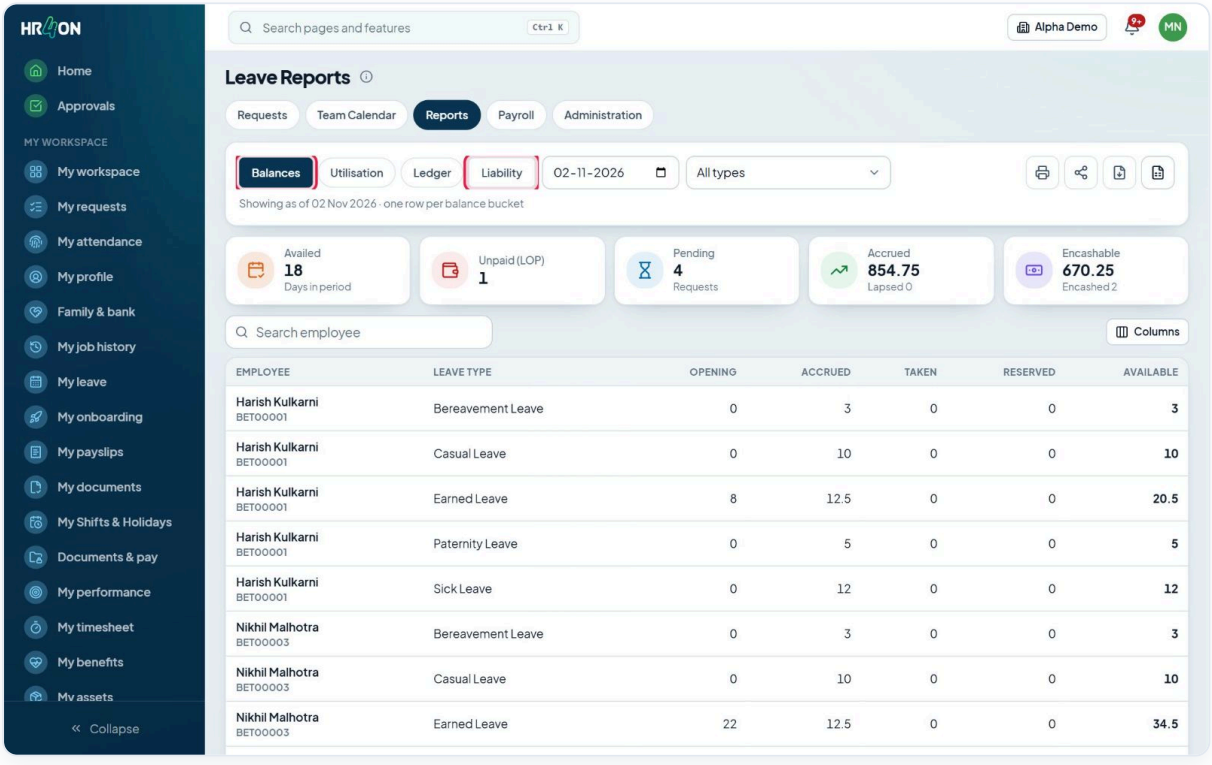
Reports in Leave shows balances for everyone in your scope, one row per person and leave type.

WHAT YOU SEE

- **OPENING**, **ACCRUED**, **TAKEN**, **RESERVED** (held for pending requests) and **AVAILABLE**.
- The summary tiles show leave availed, unpaid days, pending requests, total accrued, lapsed and encashable days.
- Other tabs: **Utilisation** (leave taken by type and team), **Ledger** (every entry) and **Liability** (the value of leave balances).

HOW TO DO IT

1. Open **Leave**, then the **Reports** tab. **Balances** opens first.
2. Pick a leave type.
3. Select a row to open the person's ledger.
4. Use **Download CSV** to export.

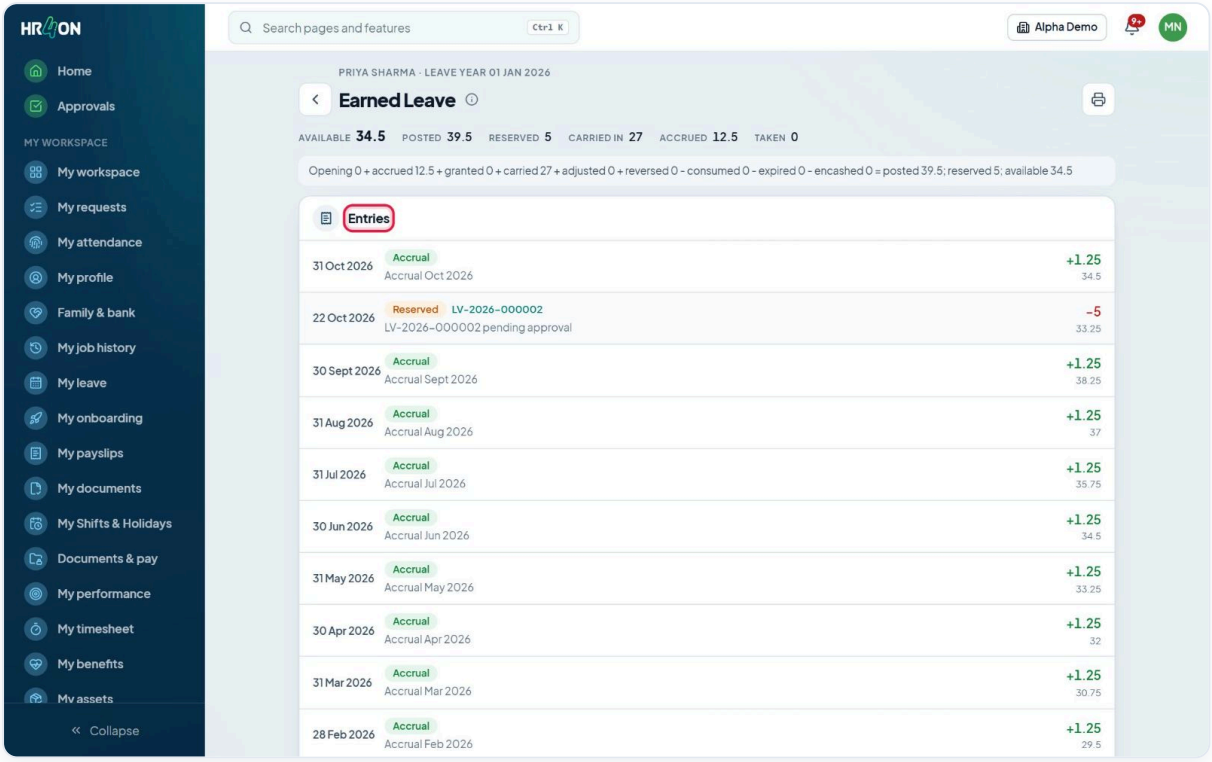


7.2 Read a leave ledger

The ledger shows every entry on one balance in date order, with the available balance after each one.

WHAT YOU SEE

- Entry types include opening balance, accrual, reserved (pending request), taken, released, adjustment, carry forward, lapse and encashment.



7.3 Run accrual, year-end and expiry

Runs post leave credits and year-end changes for many people at once. Always preview first.

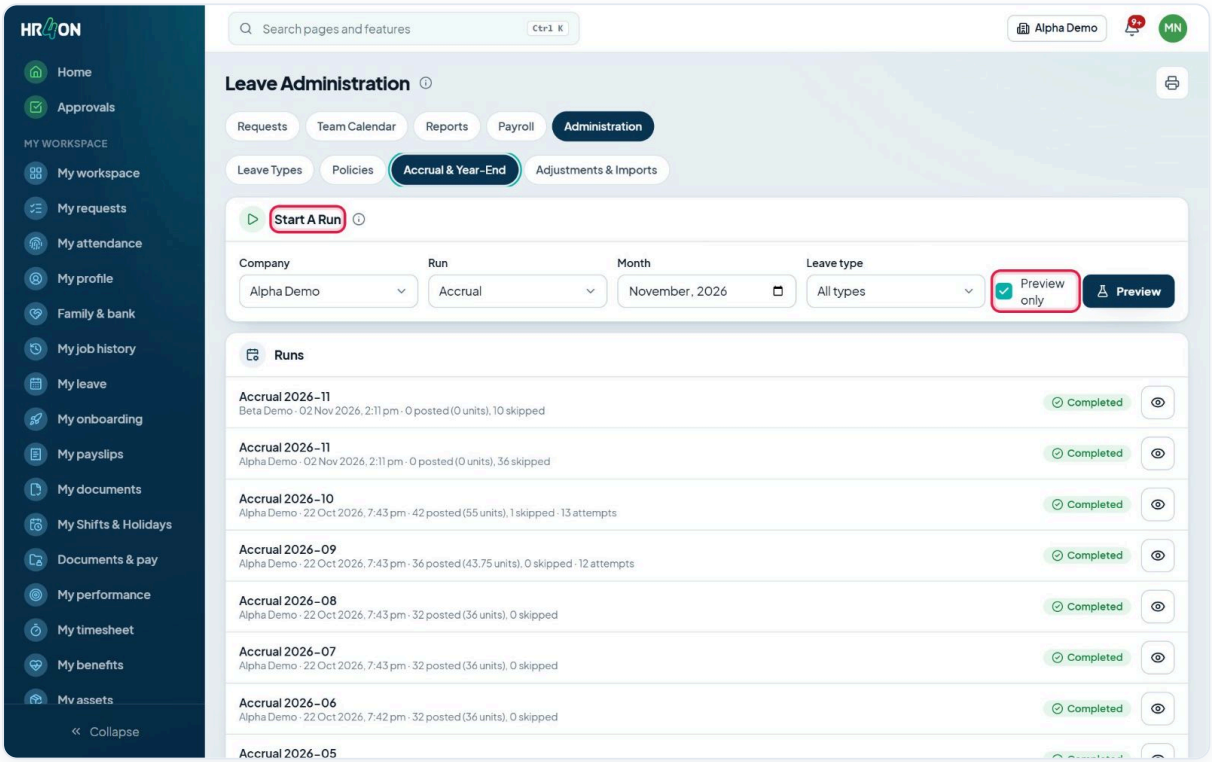
WHAT YOU SEE

- **Accrual**: posts credits due for a month.
- **Year-end**: carries forward or lapses balances for a closed leave year. Pending requests block their balance until decided.
- **Expiry**: lapses carried-forward and comp-off credits past their date.

HOW TO DO IT

1. Open **Administration**, then **Accrual & Year-End**.
2. Under **Start A Run**, choose the **Company**, the **Run** type, the **Month** and, if you want, one **Leave type**.
3. Keep **Preview only** ticked and select **Preview**. Each run appears under **Runs**; check its results with the eye button (**Outcomes**).
4. Untick **Preview only** and select **Run** to post.

> **GOOD TO KNOW**
> - Re-running never posts twice: a credit already posted for a period is skipped.



7.4 Adjust a balance or import opening balances

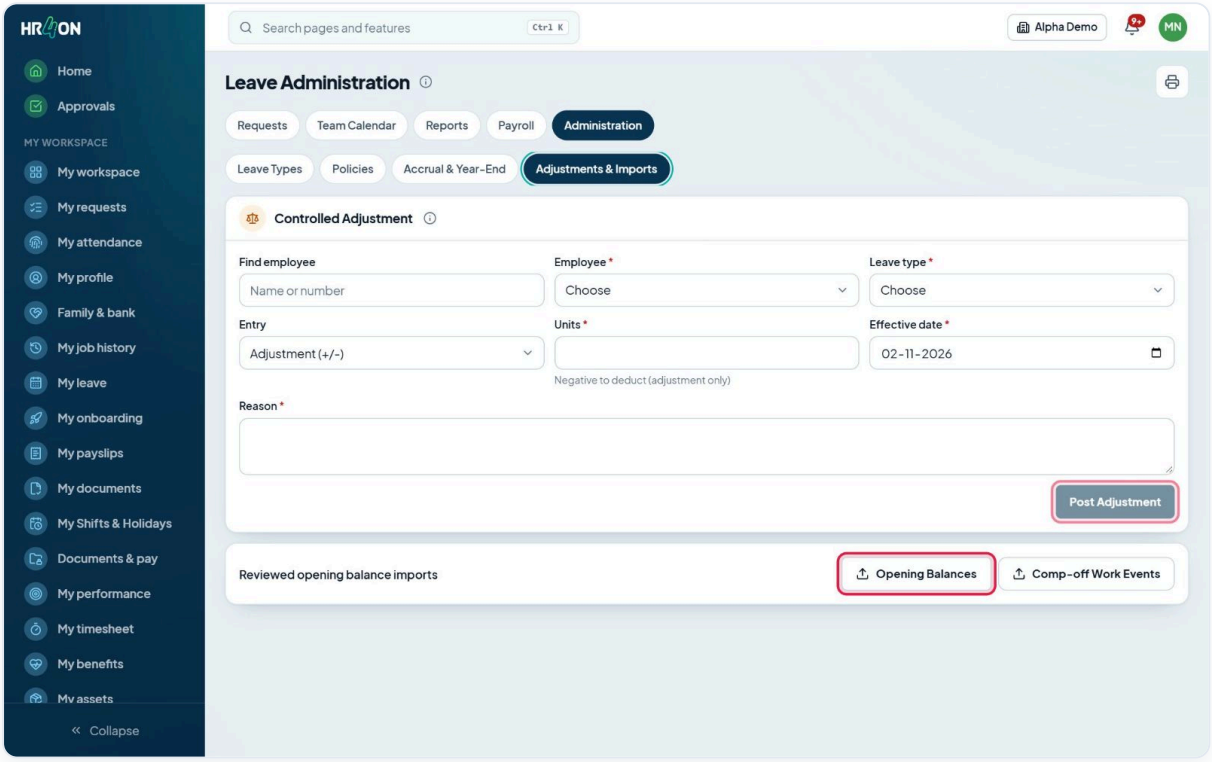
Use a controlled adjustment to correct a balance or grant extra days. Opening balances for a new leave year (or when you move to HR4ON) are imported from a spreadsheet.

HOW TO DO IT

1. Open **Administration**, then **Adjustments & Imports**.
2. Find the employee, choose the **Leave type** and **Entry** (**Adjustment (+/-)** or **Grant**).
3. Enter the **Units** (negative to deduct), the **Effective date** and a **Reason**.
4. Select **Post Adjustment**.
5. To load many balances, select **Opening Balances** or **Comp-off Work Events** and follow the import steps.

GOOD TO KNOW

- Every adjustment is a permanent ledger entry with your reason in the audit trail. To undo one, post an opposite adjustment.
- Opening balances can be loaded once per leave year; later changes are adjustments.



7.5 Settle leave encashment and payroll inputs

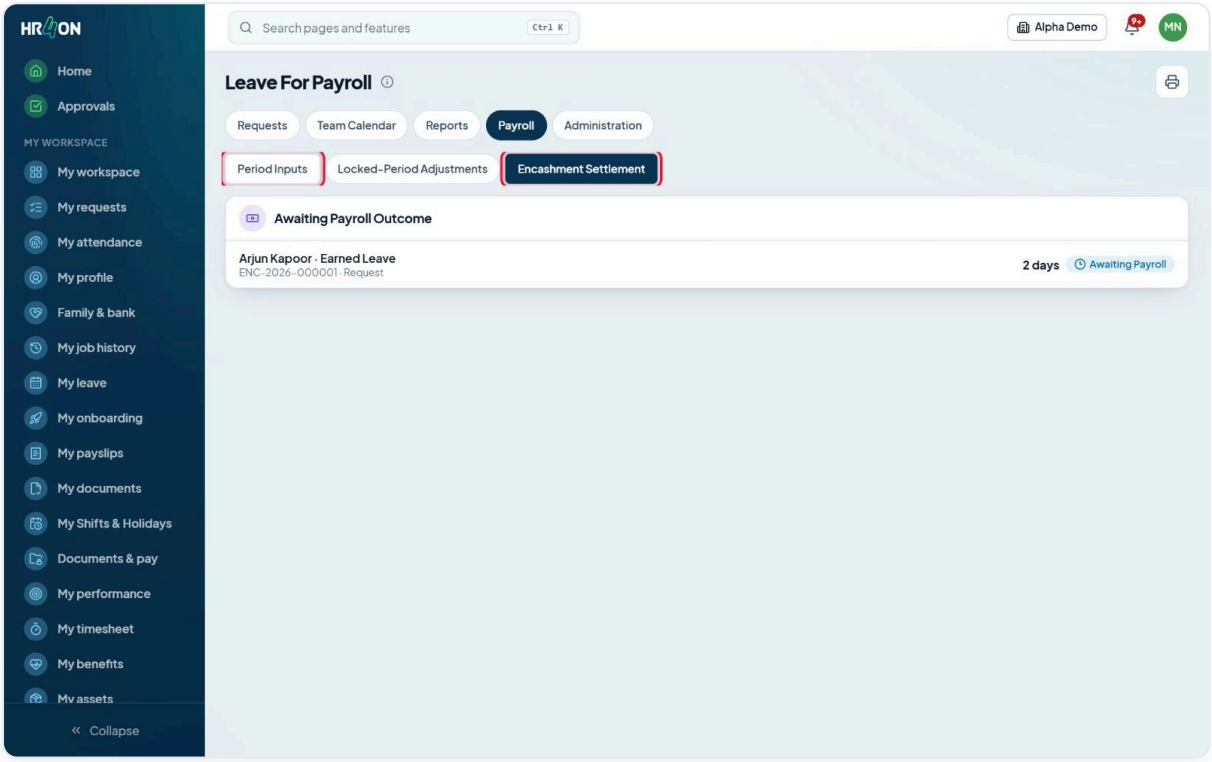
Payroll in Leave lists what leave sends to payroll: unpaid days, encashment and corrections to earlier periods.

WHAT YOU SEE

- **Period Inputs**: unpaid leave (LOP) per date for the pay period, and encashment days.
- **Locked-Period Adjustments**: approved leave that changed after payroll was locked. Select **Acknowledge** once payroll has handled it.
- **Encashment Settlement**: approved encashment awaiting payroll. Use **Record Outcome** with **Paid** or **Not Paid**, the **Payroll run / payment reference** or **Why was it not paid?**.

HOW TO DO IT

1. Open **Leave**, then **Payroll**.
2. Choose the company and pay period.
3. Work through each tab with the payroll team.



08 Shifts and rosters

Shifts & Rosters is where you define shifts and work patterns, plan rosters for teams that work in shifts and handle swaps and last-minute changes.

8.1 Set up shifts and night shifts

Shift setup lists the shift templates: general, rotating, split, flexible, overnight and on-call.

WHAT YOU SEE

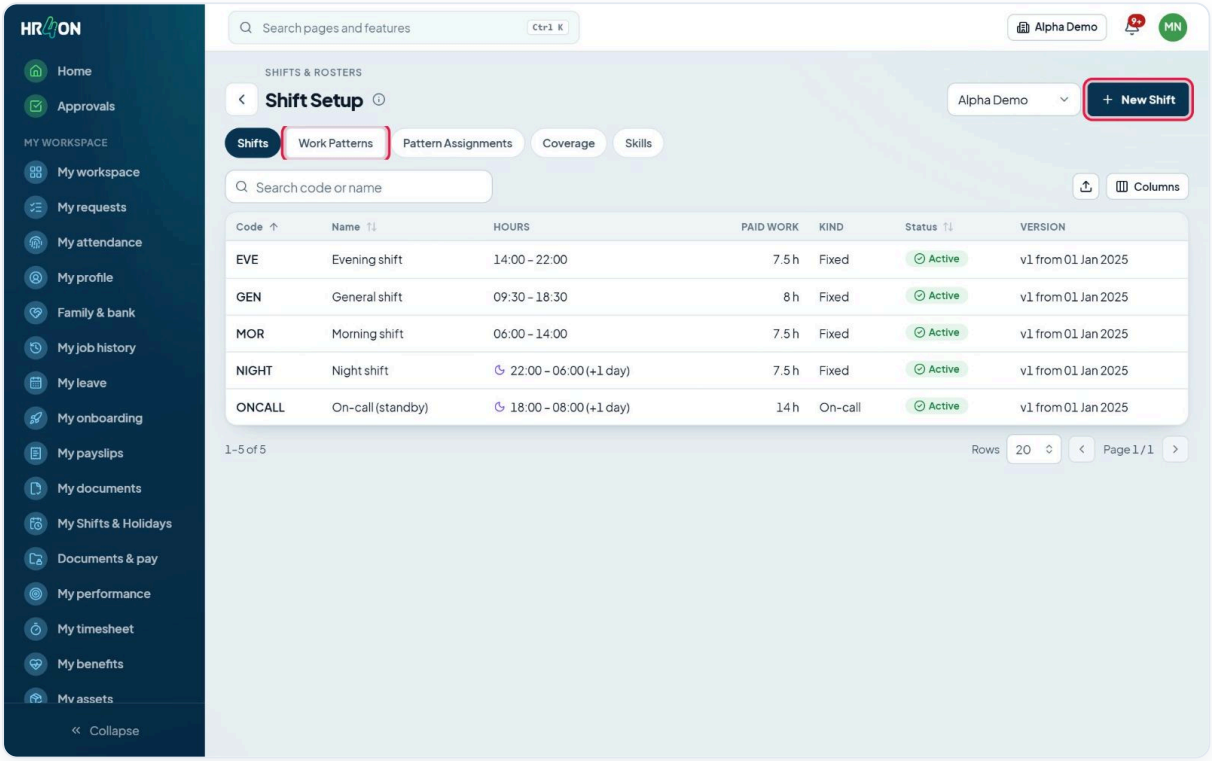
- Each shift shows its times, paid hours, kind, status and version. Overnight shifts end "(+1 day)".
- The shift form covers **Start**, **End**, breaks (**Add Break**), grace, **Minimum minutes for a full day**, **Half-day minutes**, **Required skill**, **Time zone** and, for night shifts, **Work date for overnight duty**.
- Allowances: **Allowance input code** and **Allowance unit** (**Per shift** or **Per hour**), with switches for no allowance on holidays or leave days. Payroll calculates the amounts.

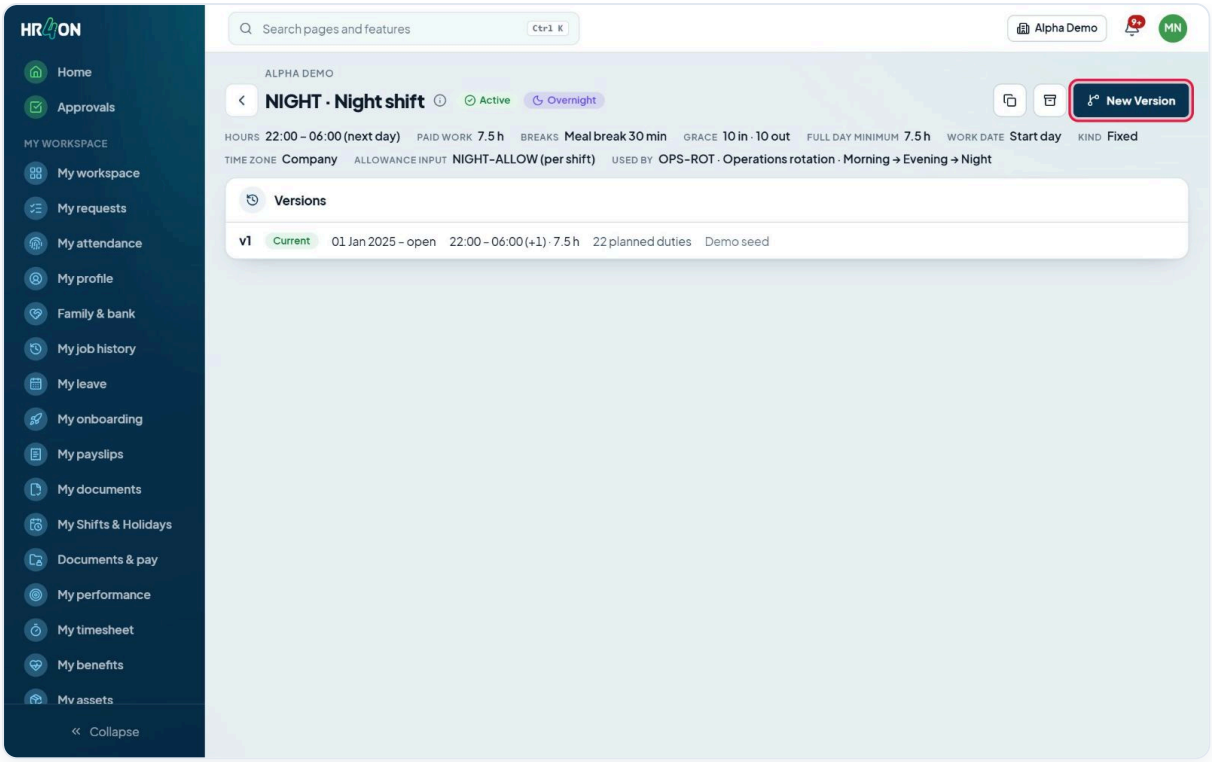
HOW TO DO IT

1. Open **Shifts & Rosters** and select the **Shift setup** button at the top of the page.
2. Select **New Shift**, fill in the form and select **Create Shift**.
3. Open a shift to see its versions. Use **New Version** to change it from a date, **Copy** to make a similar shift, or **Retire**.

GOOD TO KNOW

- Rosters already planned keep the exact shift version and times they used.





A night shift: the end time falls on the next day.

8.2 Work patterns and coverage

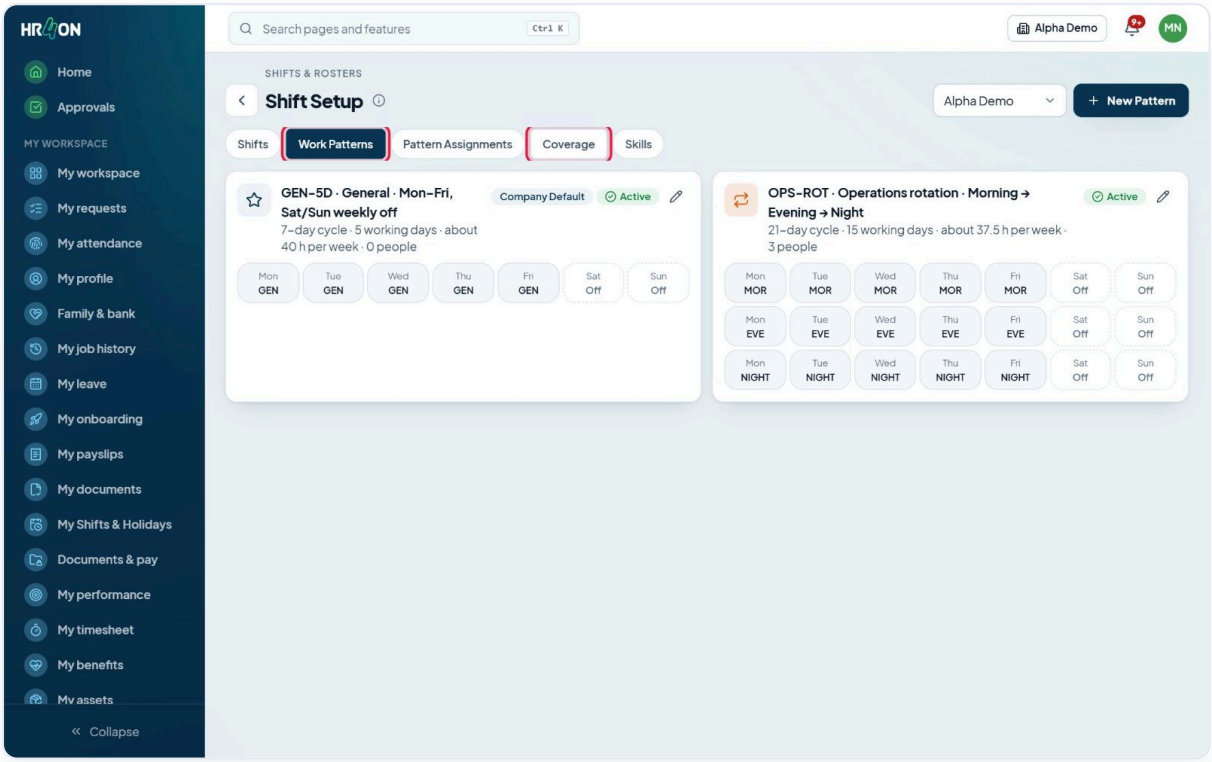
Work patterns set weekly offs and rotations; coverage rules set how many people a roster needs.

WHAT YOU SEE

- **Work Patterns**: a weekly-off pattern or a rotation with **Cycle length (days)**. The **Company default** applies to everyone without their own pattern.
- **Pattern Assignments**: give a person a pattern from a date.
- **Coverage**: minimum and maximum people per shift, role, skill and location.
- **Skills**: scheduling skills that Learning certifications do not cover.

HOW TO DO IT

1. Select the tab you need.
2. Use the add button at the top (for example **New Pattern**), fill in the form and save.



8.3 See rosters

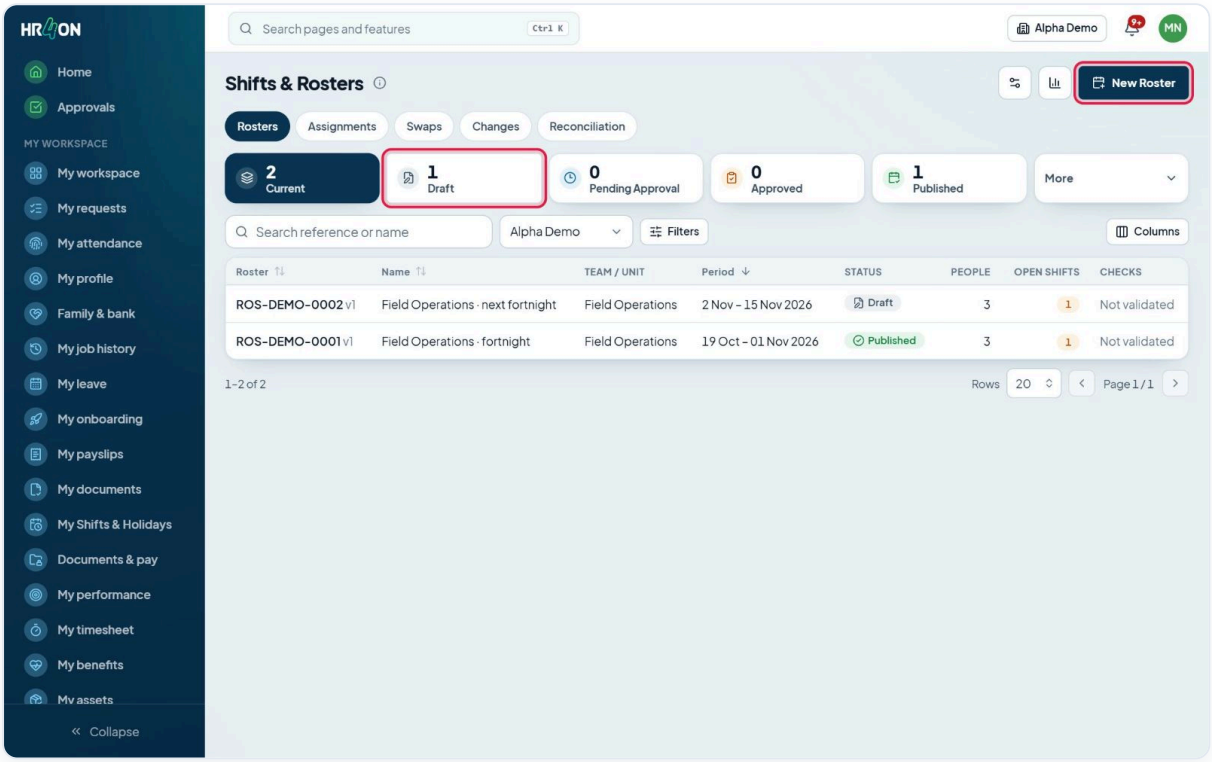
The **Rosters** tab lists each team's roster by period with its status.

WHAT YOU SEE

- Statuses: **Draft**, **Pending Approval**, **Approved**, **Published**, and under **More**, **Superseded** and **Cancelled**.
- **OPEN SHIFTS** and **CHECKS** show unfilled slots and whether the roster has been validated.

HOW TO DO IT

1. Open **Shifts & Rosters**.
2. Select **New Roster** to start one for a team and period, or open an existing roster.



8.4 Plan a roster

The roster planner shows people by day. Assign duties, add open shifts for others to claim, then validate.

WHAT YOU SEE

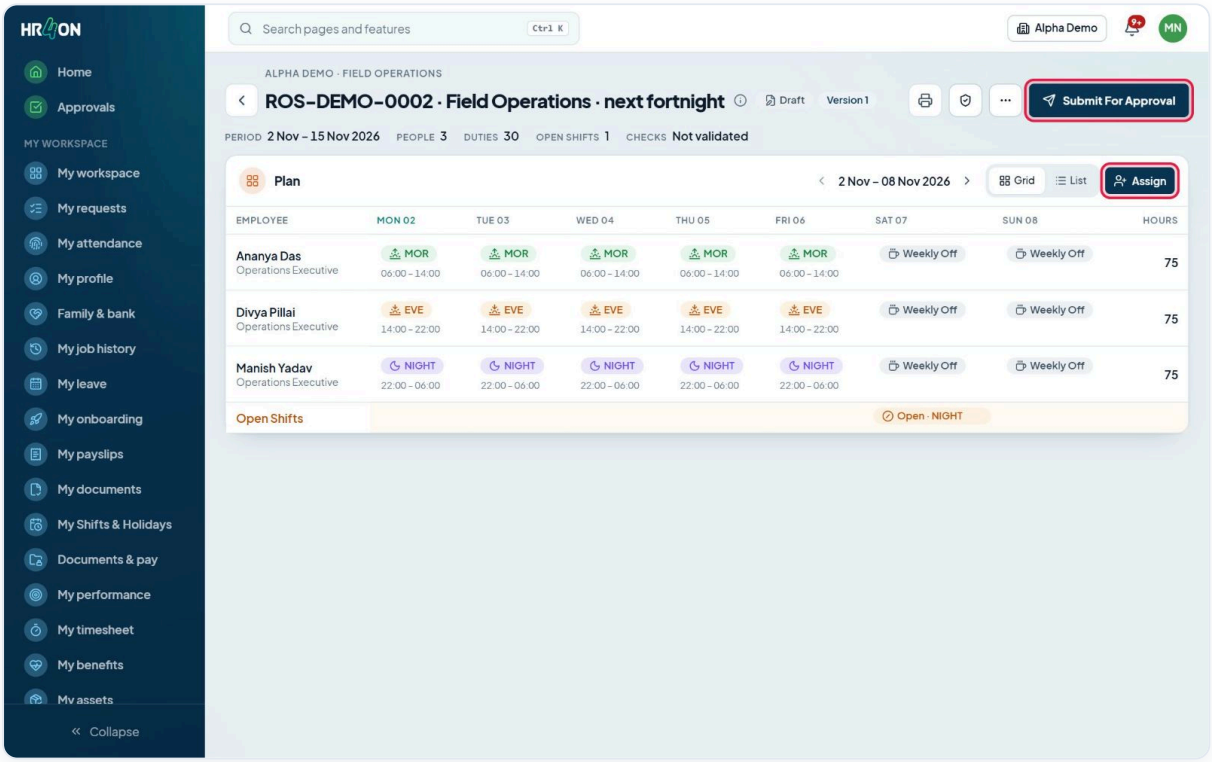
- **Grid** and **List** views; move between weeks with the arrows.
- **Assign** opens **Assign Duty**: choose the employee, shift, dates and, for open shifts, **Open slots per date**.
- Validation checks overlaps, rest time, weekly hours, consecutive days, approved leave, availability, skills, retired shifts, holidays and coverage.

HOW TO DO IT

1. Open a draft roster.
2. Select **Assign** to add duties, or select a cell to change it.
3. Select **Validate** and fix hard conflicts.
4. Select **Submit For Approval**. After approval, select **Publish**, giving an override reason for any warning.

GOOD TO KNOW

- Drafts are proposals only; employees see a roster only once it is published, and they are notified.
- Published versions are frozen. Use **Revise** to change them.



8.5 Assign a duty

The Assign Duty form adds duties for the chosen people on the chosen dates, or open shifts anyone qualified can claim.

WHAT YOU SEE

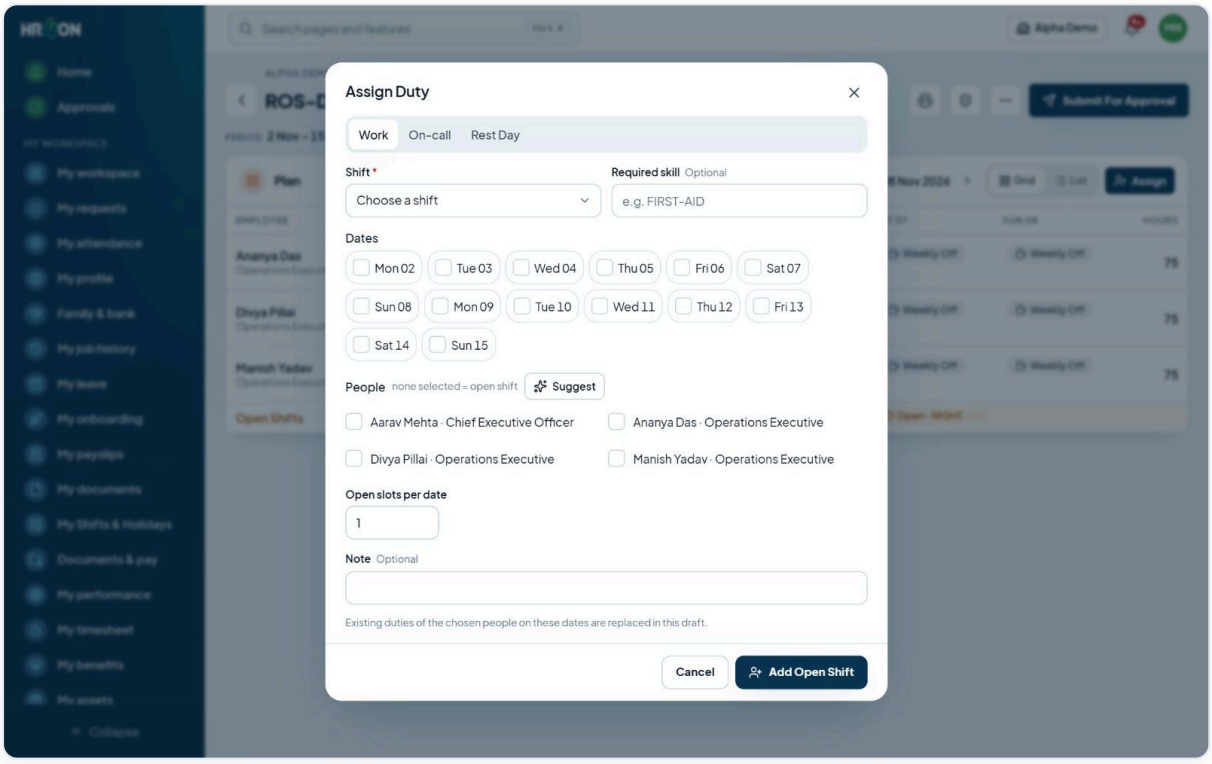
- **Work**, **On-call** or **Rest Day**.
- **Shift** and an optional **Required skill**.
- **Dates**: tick each day.
- **People**: tick the people, or use **Suggest**. With nobody selected the duty becomes an open shift, with **Open slots per date**.

HOW TO DO IT

1. Select **Assign**.
2. Choose the duty type and shift, tick the dates and the people.
3. Select the button at the bottom to add the duties (it reads **Add Open Shift** when nobody is selected).

GOOD TO KNOW

- Existing duties of the chosen people on those dates are replaced in this draft.

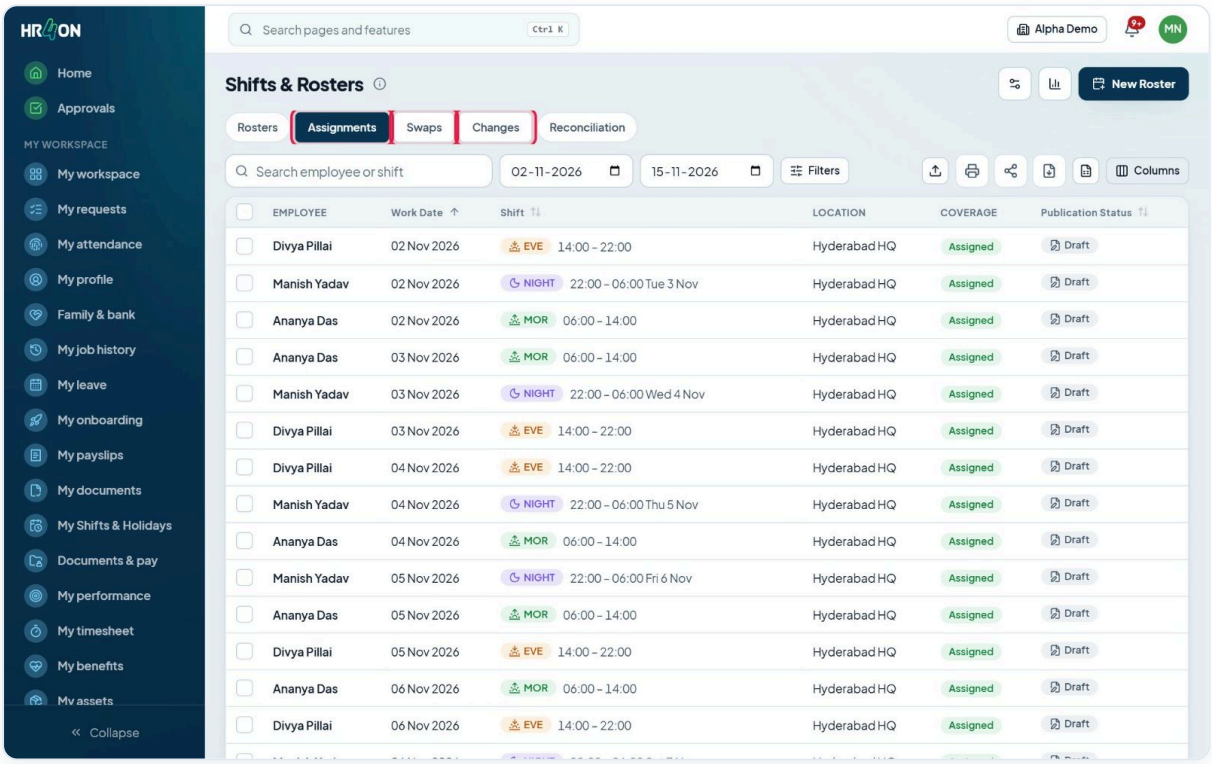


8.6 Assignments, swaps and changes

The other tabs follow published schedules day to day.

WHAT YOU SEE

- **Assignments**: every duty with work date, shift, location and publication status. **Import draft assignments** loads a planned roster from a spreadsheet.
- **Swaps**: swap requests between employees. Both employees agree, then the manager approves in their approvals inbox. Execution re-checks rest, overlap and leave rules.
- **Changes**: emergency changes, replacements and open-shift claims on published rosters.
- **Reconciliation**: tasks raised when a published schedule changes on a date whose attendance is already closed.



8.7 Roster reports

Roster reports show coverage gaps, changes and swaps, and planned hours and allowances.

WHAT YOU SEE

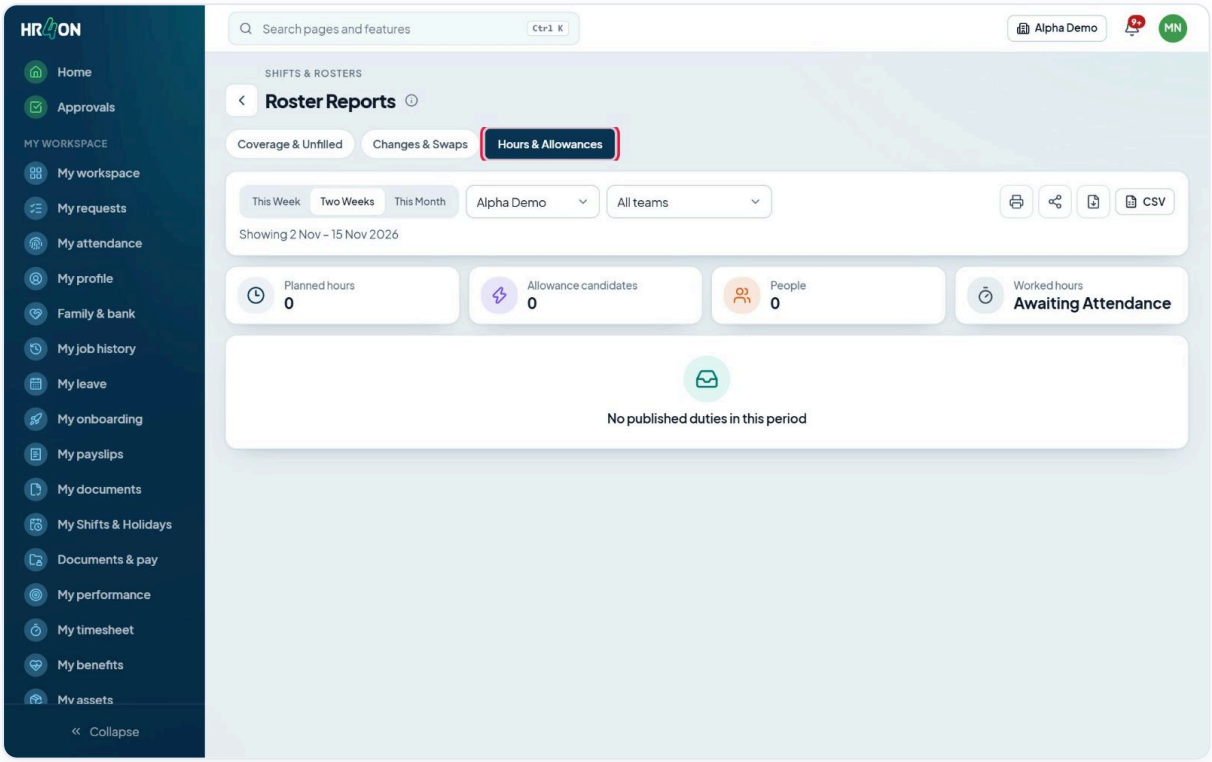
- **Coverage & Unfilled**: required slots, under-staffed and over-staffed shifts and open shifts.
- **Changes & Swaps**: what changed after publication.
- **Hours & Allowances**: planned hours, on-call duties and night or allowance shifts per person.

HOW TO DO IT

1. On **Shifts & Rosters**, select the **Roster reports** button at the top of the page.
2. Choose **This Week**, **Two Weeks** or **This Month**.
3. Use **CSV** to export.

TIP

- Reports count published rosters only. A period that only has a draft roster, like the one in the screenshot, shows nothing until the roster is published.



09 Holiday calendars

Holiday calendars set the public, optional and restricted holidays used by schedules, attendance and leave.

9.1 See your holiday calendars

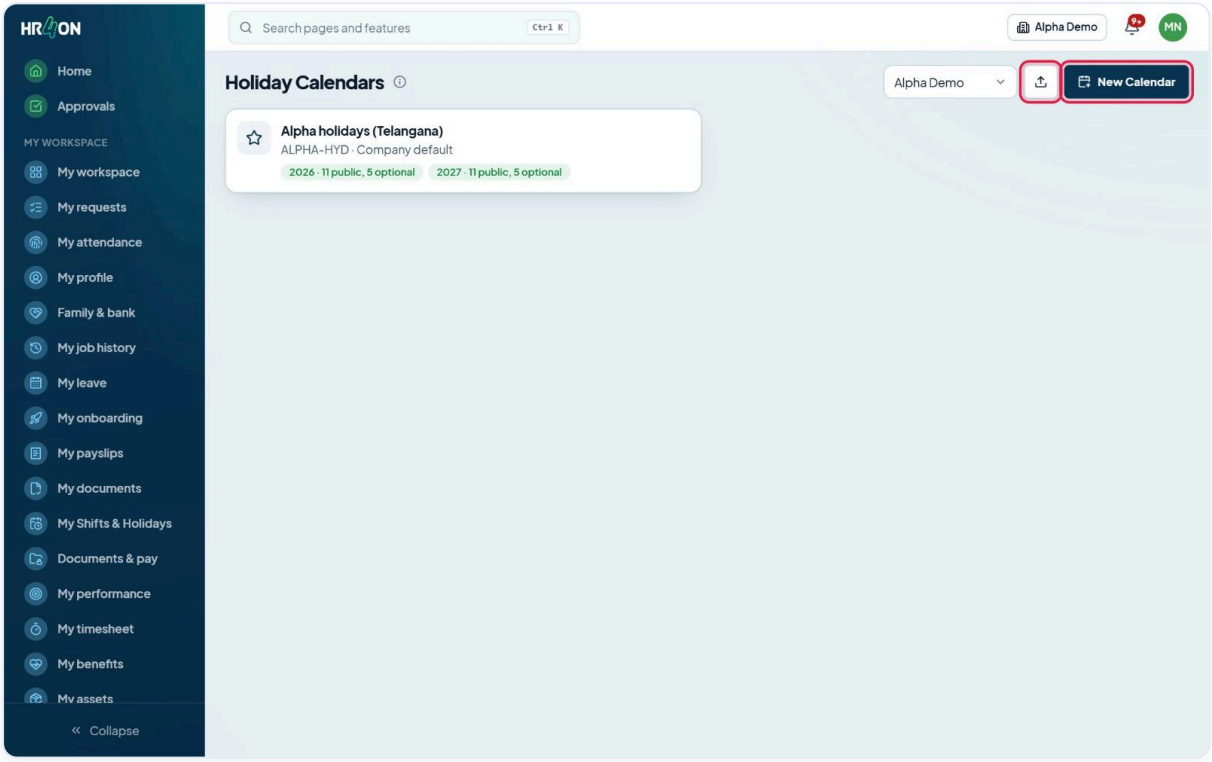
Each company has a default calendar; a work location can have its own, and individual employees can be given a specific calendar.

HOW TO DO IT

1. Open **Holiday Calendars**.
2. Select a calendar to see its years.
3. Select **New Calendar** to add one, or **Import holidays** to load dates from a spreadsheet.

GOOD TO KNOW

- Demo calendar dates are examples. Check them against the official holiday notification.



9.2 Review a holiday year

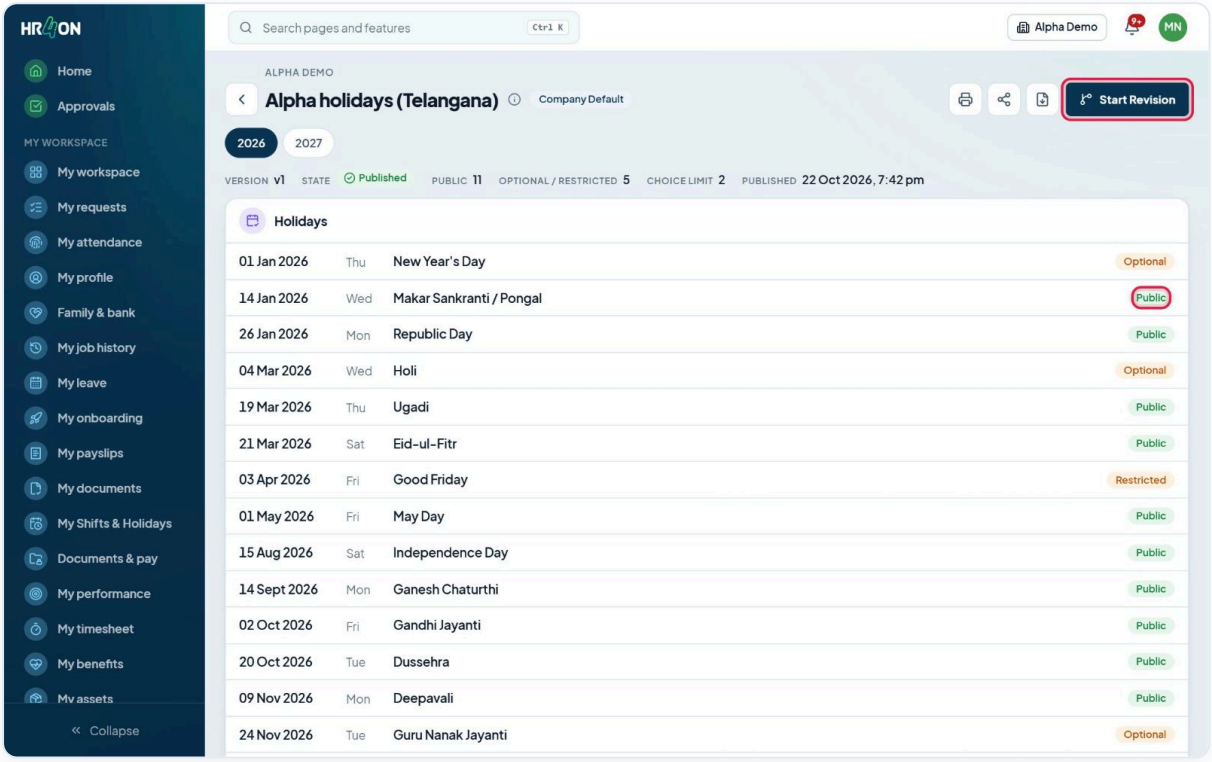
A calendar year lists every holiday with its type, and how many optional holidays each employee may choose.

WHAT YOU SEE

- **Public**: everyone is off. **Optional** and **Restricted**: employees choose up to the **CHOICE LIMIT**.
- **STATE**: **Published** years are frozen and used by schedules, attendance and leave.
- **Employee-Specific Applicability**: people who follow this calendar instead of their location's.

HOW TO DO IT

1. Open the calendar and pick the year tab.
2. Use **Assign Employee** to give one person this calendar.



9.3 Change a published year

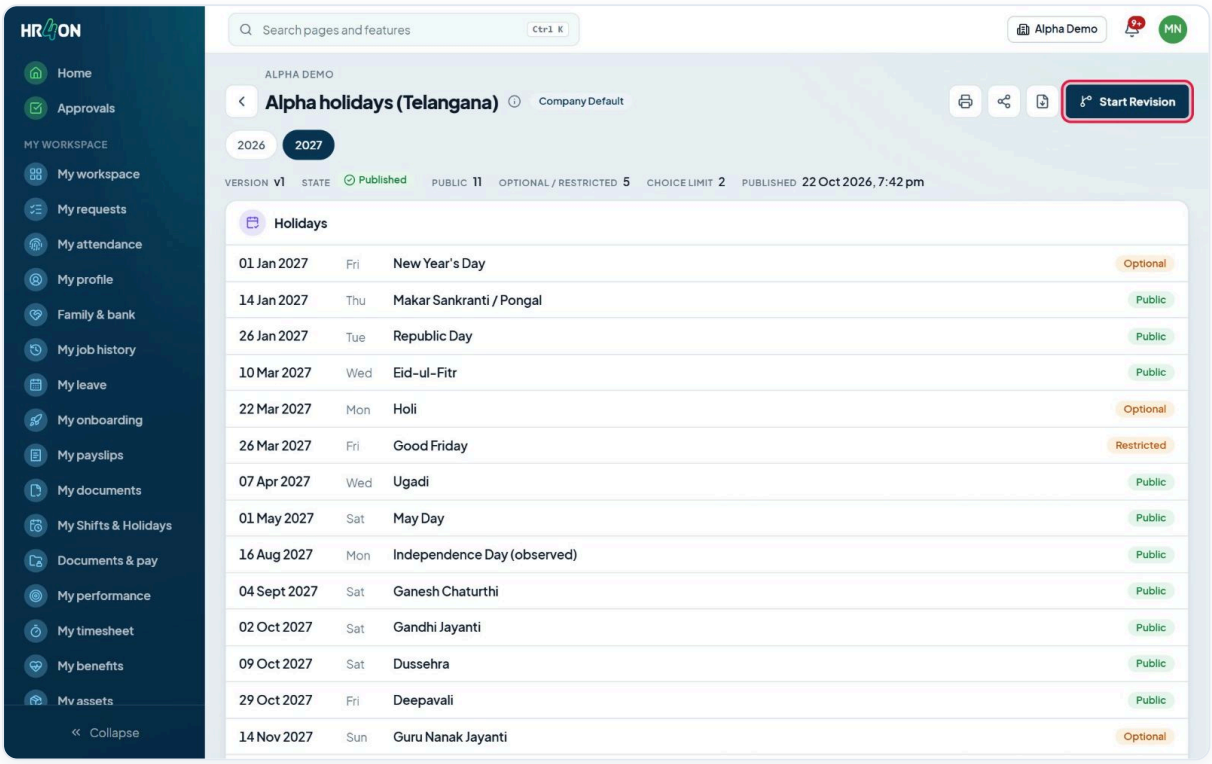
Changes are made in a draft revision that replaces the published year when you publish it.

HOW TO DO IT

1. Select **Start Revision**.
2. Use **Add Holiday**, change dates or types, or **Remove holiday**. Movable festivals must be re-dated each year.
3. Set **Optional holidays each employee may choose**.
4. Select **Save Draft**, then **Publish**.

GOOD TO KNOW

- Publishing updates schedules, attendance and leave counting for the dates that changed.



10 Projects and allocation

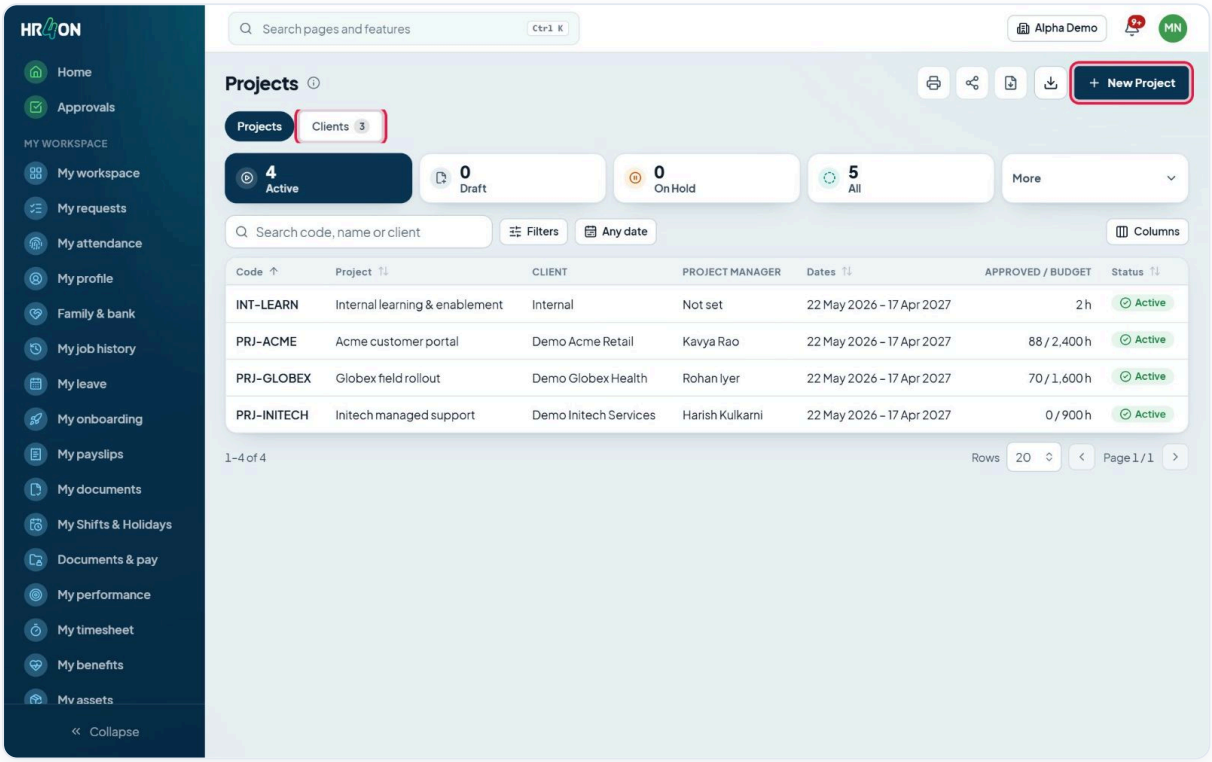
Projects record clients, budgets and activities that people book time to. Allocations say who works on which project and how much of their time.

10.1 See projects and clients

Projects & allocation lists projects with their client, manager, dates and approved hours against budget.

HOW TO DO IT

1. Open **Projects & allocation**.
2. Use the status tiles (**Active**, **Draft**, **On Hold**, **All**).
3. Select the **Clients** tab to manage clients with **New Client**.



10.2 Create a project

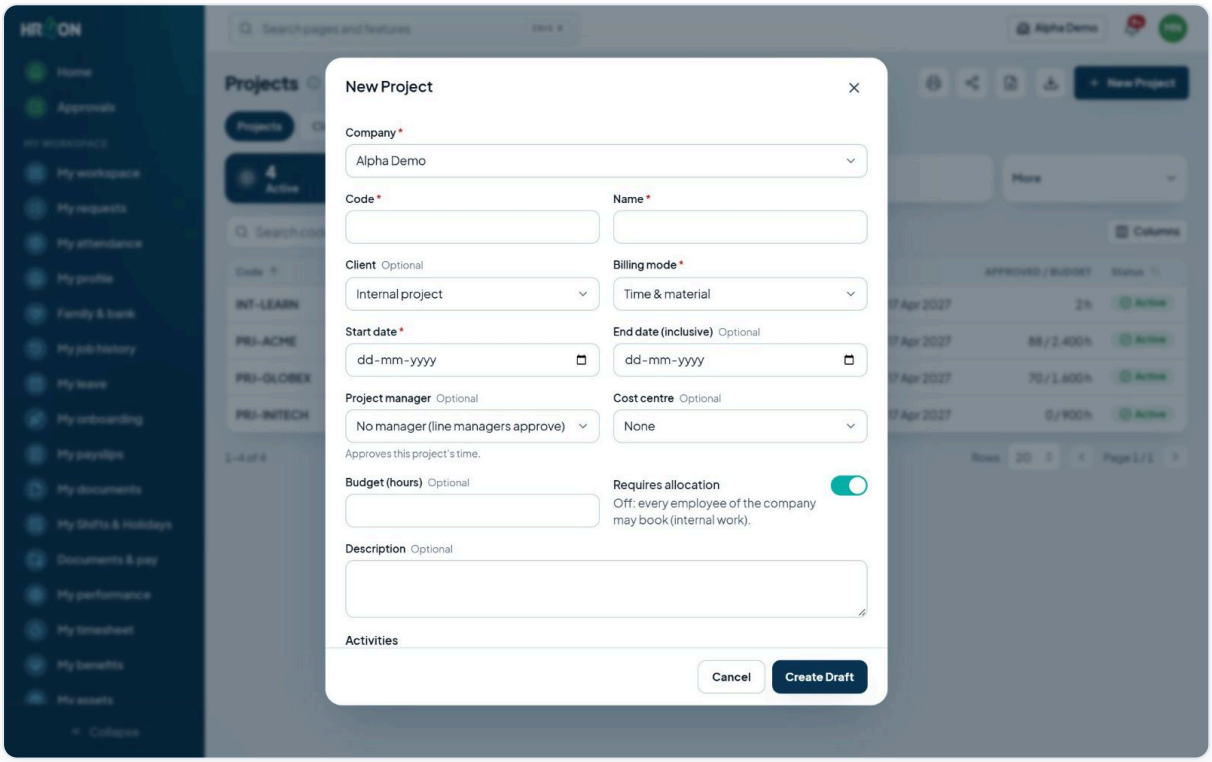
A project needs a code, name, client (or internal), manager, dates and a budget in hours.

WHAT YOU SEE

- **Billing mode**, **Budget (hours)**, **Cost centre**.
- **Requires allocation**: when off, every employee of the company may book time (for internal work).
- **Activities**: what time is booked against, each **Billable** or not.

HOW TO DO IT

1. Select **New Project**.
2. Choose the **Company**, then fill in **Code**, **Name**, **Client** (or **Internal project**), **Billing mode**, dates, **Project manager**, **Cost centre** and **Budget (hours)**.
3. Add activities under **Activities**.
4. Select **Create Draft**. Activate the project from its page when it is ready.



10.3 Open a project

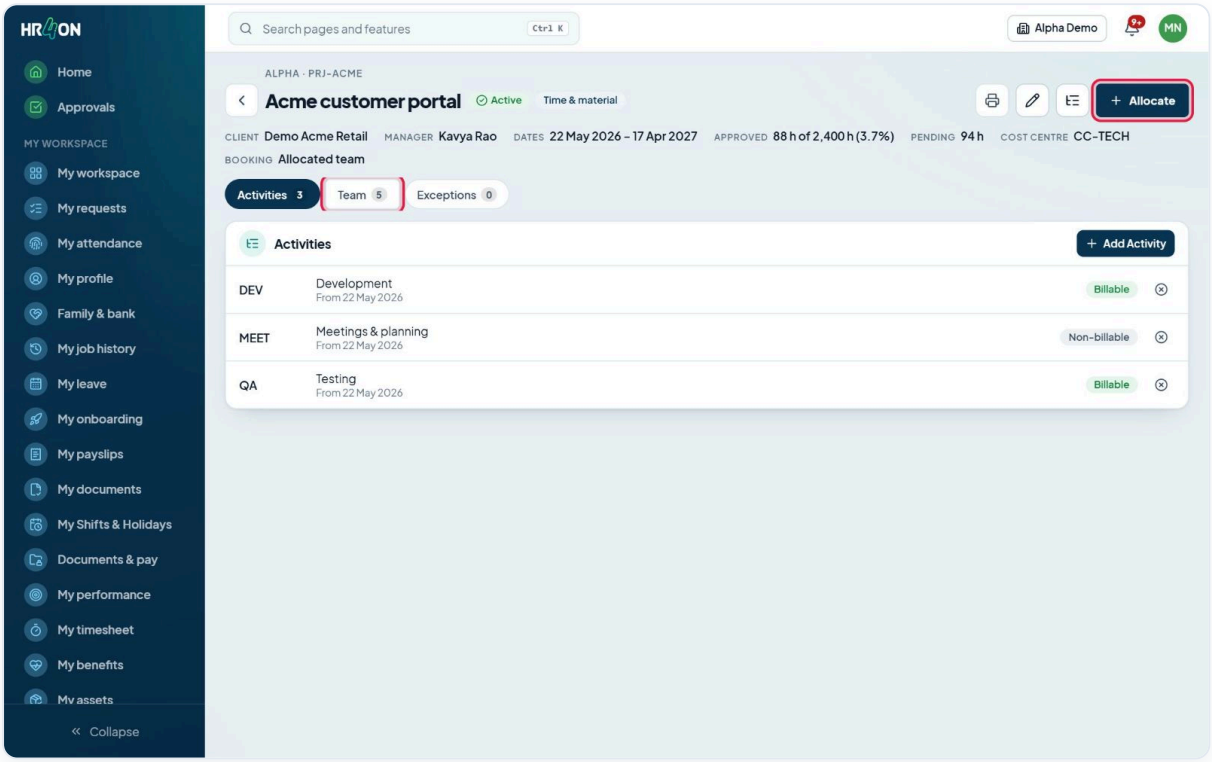
The project page shows hours approved and pending against budget, and the activities, team and booking exceptions.

WHAT YOU SEE

- **Activities**: add or close activities.
- **Team**: who is allocated.
- **Exceptions**: people allowed to book time outside an approved allocation (**Grant Exception**).
- Finance sees rates and labour cost on the same page.

HOW TO DO IT

1. Open the project.
2. Use the buttons at the top: **Edit project** (pencil), **Project status** (for example **Put On Hold**) and **Allocate**.



10.4 Plan allocations

The **Allocation planner** shows each person's allocation as a percentage of their capacity, so you can see who is over-allocated.

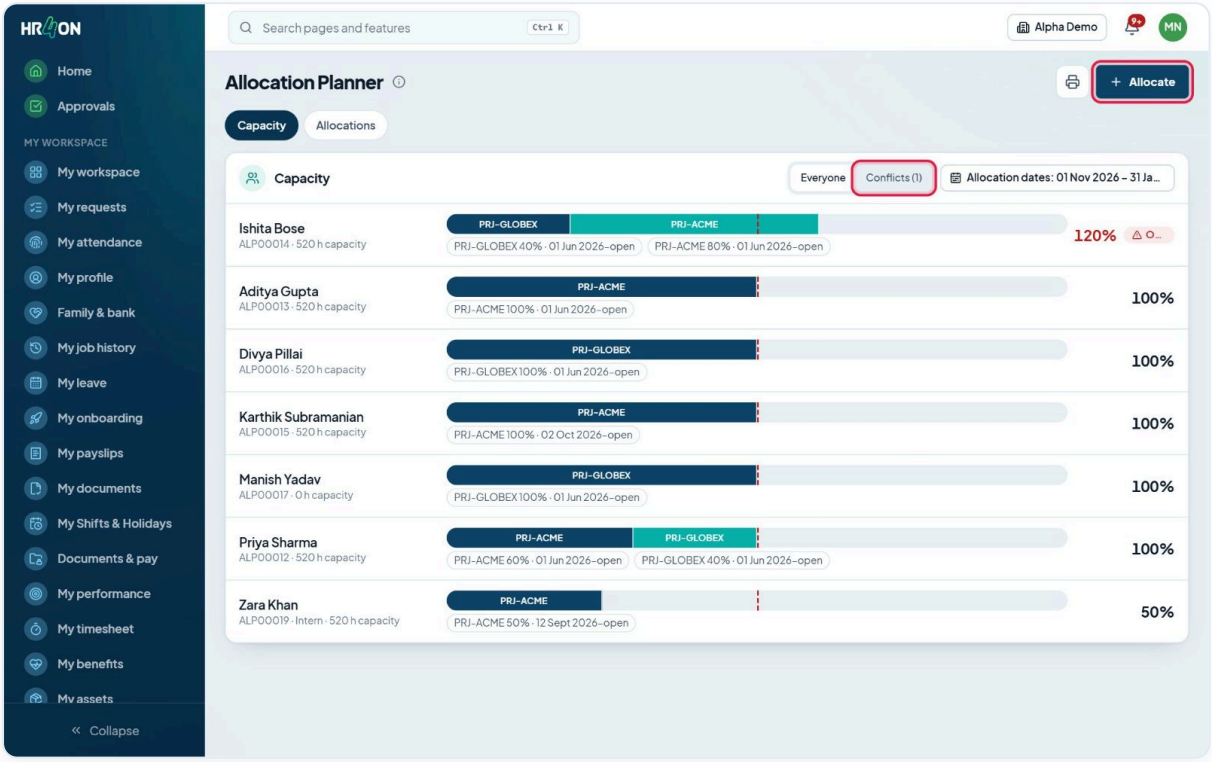
WHAT YOU SEE

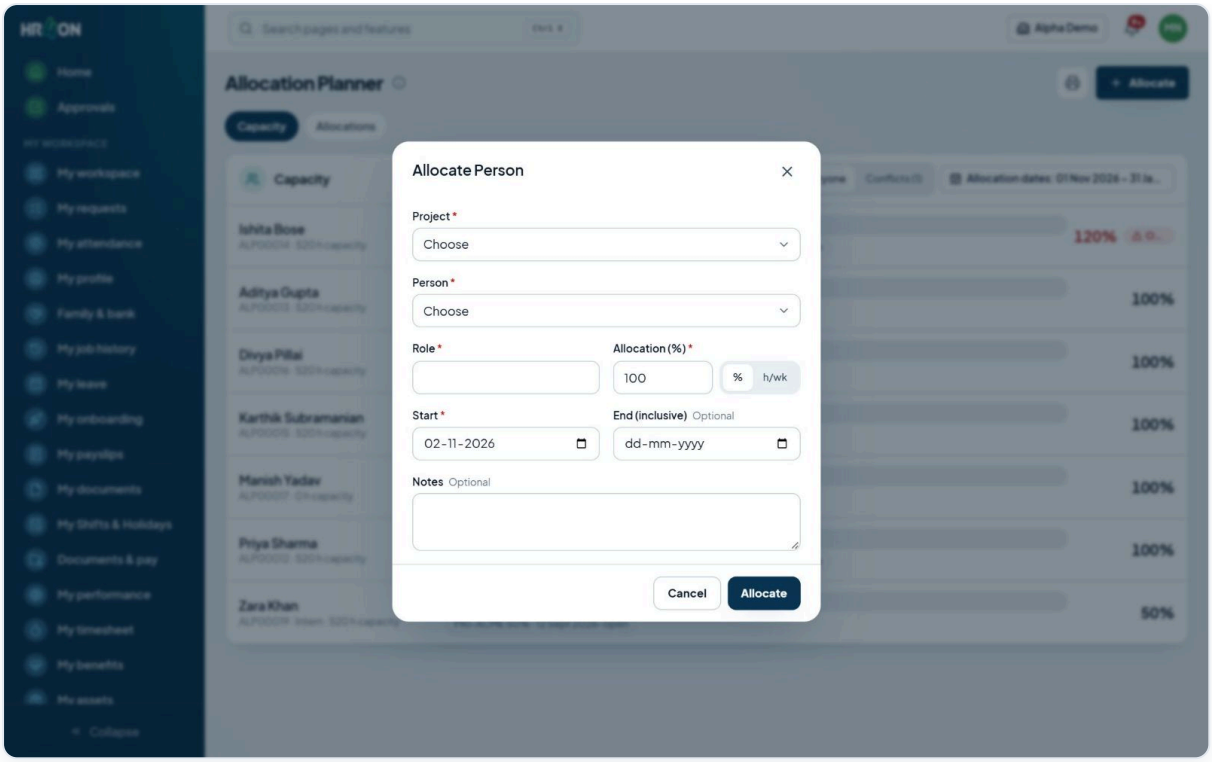
- **Capacity**: one bar per person with their projects. **Over** marks more than 100%.
- **Conflicts**: only people over capacity.
- **Allocations**: the full list with **Over-allocated** and **Pending Approval** filters.

HOW TO DO IT

1. Open **Allocation planner**.
2. Select **Allocate**. In **Allocate Person** choose the **Project** and **Person**, type the **Role** and the **Allocation** as **%** or hours a week, and set **Start** and **End (inclusive)**.
3. Select **Allocate**. New and changed allocations go to the person's line manager for approval.

> **GOOD TO KNOW**
> - Only allocations without booked time can be cancelled; otherwise end them earlier.





The Allocate form.

11 Timesheets, approvals and utilisation

Employees record time against projects in their weekly timesheet. Project managers approve it, and HR and finance report on utilisation and cost.

11.1 Follow project approvals

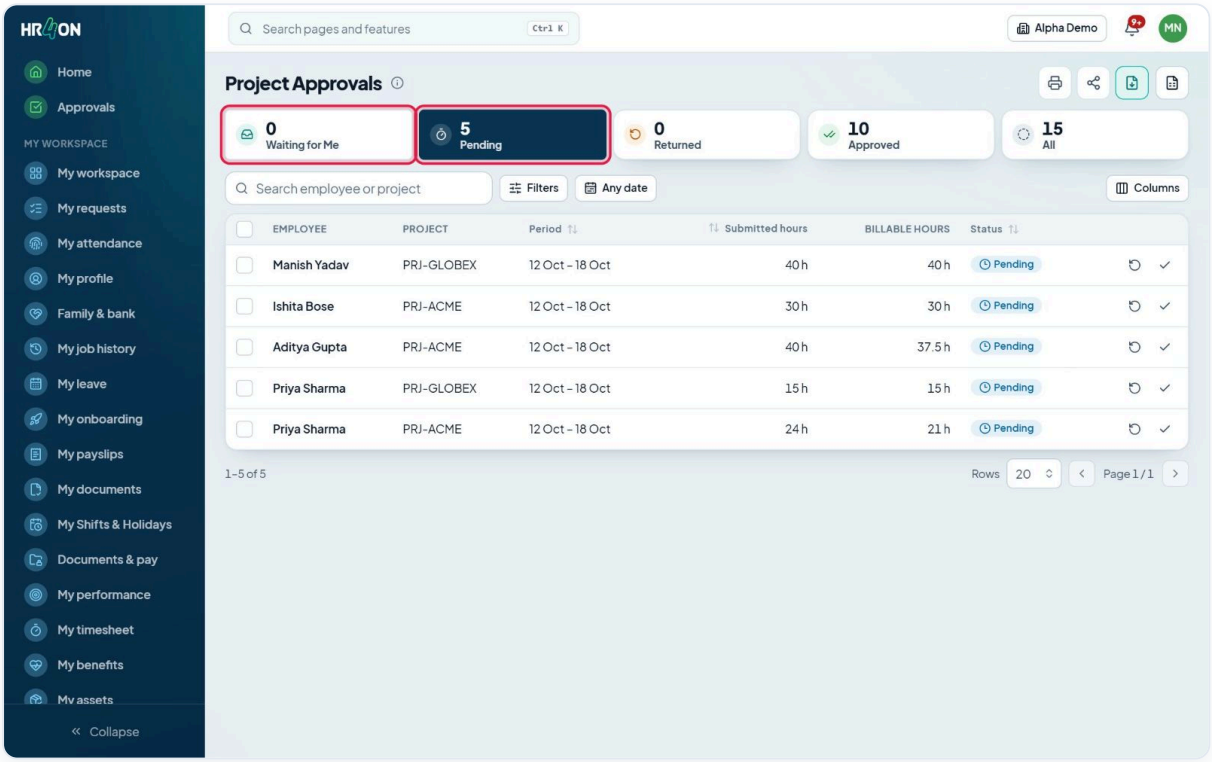
Project approvals lists submitted project time. Each project in a timesheet is decided on its own.

WHAT YOU SEE

- **Waiting for Me**: time you approve as project manager.
- **Pending**, **Returned**, **Approved** and **All**: everyone's time in your scope, so you can chase late approvals.

HOW TO DO IT

1. Open **Project approvals**.
2. Choose **Pending** to see what is waiting.
3. Select a row to open the timesheet.

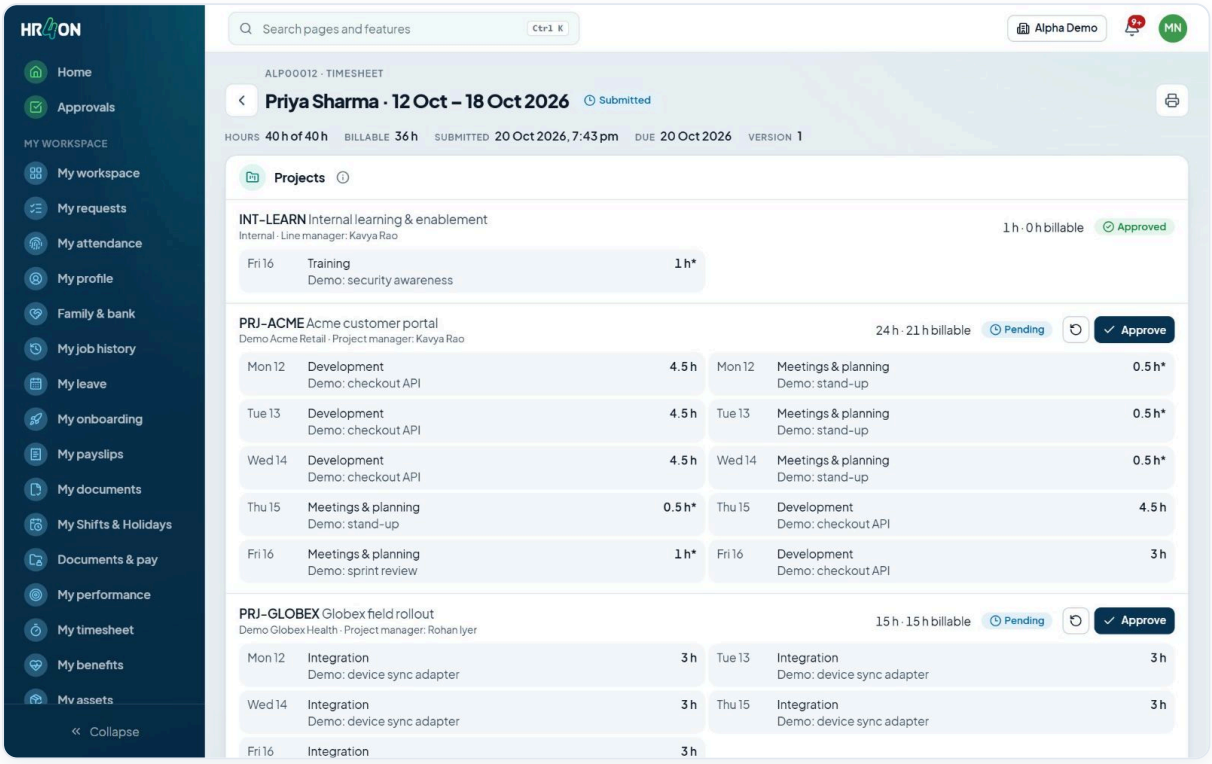


11.2 Review a timesheet

The timesheet shows hours by day and project, with notes.

HOW TO DO IT

1. Open the timesheet.
2. Select **Approve** for a project, or **Approve All Mine**.
3. Select **Return** with a reason to send one project back. The employee corrects and resubmits it; other projects keep their status.



11.3 Report on utilisation

Utilisation & cost compares approved hours with each person's available capacity.

WHAT YOU SEE

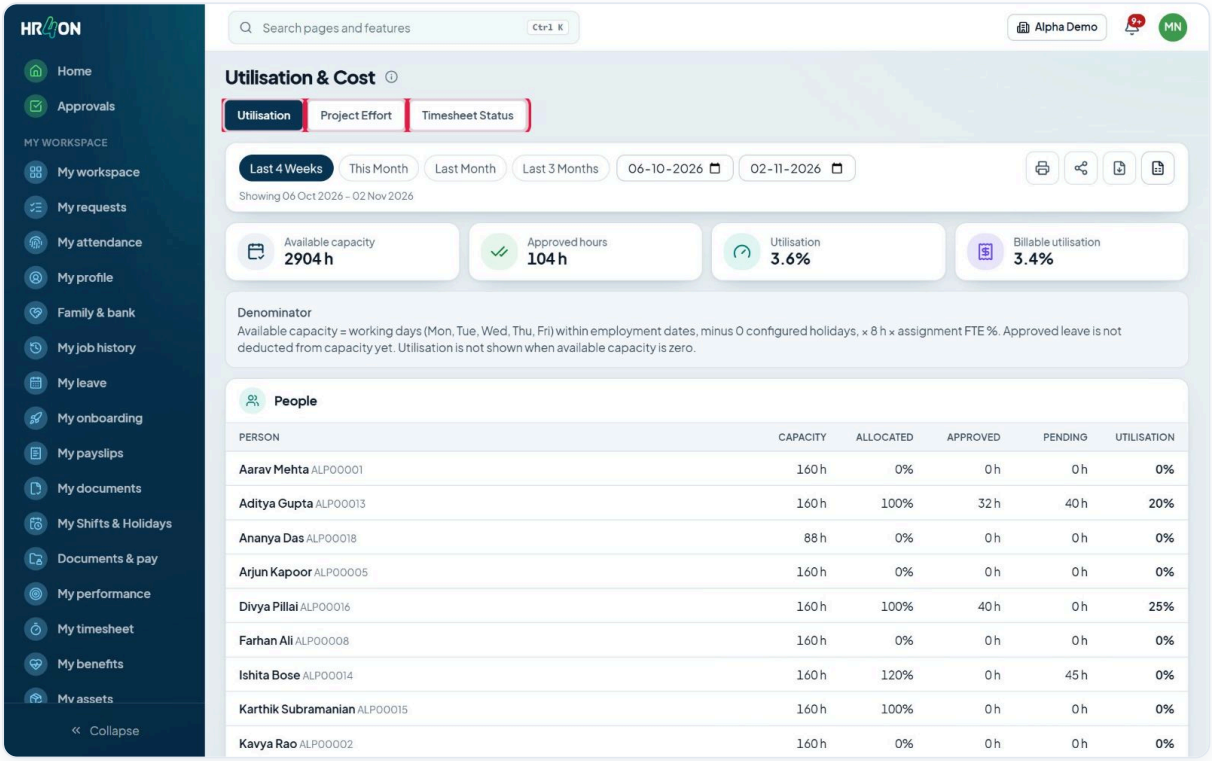
- **Available capacity**: working days within employment dates, minus holidays, times daily hours and FTE.
- **Utilisation** and **Billable utilisation**: approved (and billable) hours divided by capacity.
- **Project Effort**: approved hours per project against budget. **Timesheet Status**: submitted, missing and late timesheets.

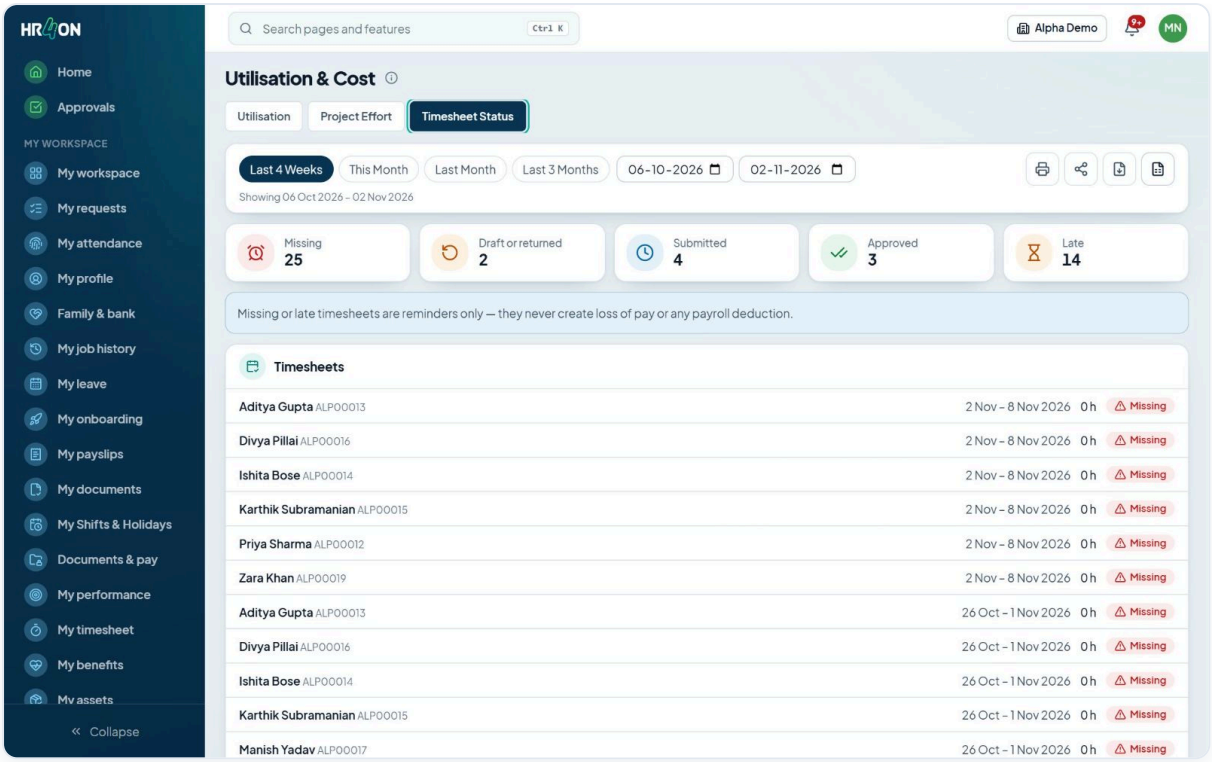
HOW TO DO IT

1. Open **Utilisation & cost**.
2. Choose **Last 4 Weeks**, **This Month**, **Last Month** or **Last 3 Months**.
3. Use **Download CSV** to export.

GOOD TO KNOW

- Missing or late timesheets are reminders only. They never create loss of pay or a payroll deduction.





Timesheet Status shows who has not submitted.

A Words used in this guide

Attendance day
One person's calculated attendance for one date, with punches, status and paid units.

Punch
A clock-in or clock-out from the web, phone or a device.

Exception
A day that needs attention. Blockers stop the payroll freeze; warnings do not.

Correction
An employee's request to fix a missing or wrong punch (also called regularisation).

Punch review
A check on a remote, outside-office or selfie-missing punch.

Geofence
A circle around an office used to tell in-office punches from remote ones.

Badge mapping
A link between a device badge or card id and an employee.

Matrix COSEC
A biometric access and attendance system HR4ON can read punches from.

Grace
Minutes after shift start (or before shift end) that are not counted as late or early.

Loss of pay (LOP)
Unpaid days deducted in payroll.

Overtime (OT)
Time worked beyond the shift that the policy makes payable.

OT day / night
A day with enough overtime to count as an overtime day, or a night-shift day, used for allowances.

Attendance period
A month of attendance that is validated and frozen for payroll.

Freeze
Taking an approved, unchangeable snapshot of a period for payroll.

Adjustment
A correction to a frozen period, paid in a later payroll.

Leave type
A kind of leave such as Casual, Sick or Earned.

Leave policy
The rules for earning, charging, carrying forward and encashing a leave type.

Accrual
Leave credited over time, for example monthly.

Ledger
The list of every entry on a leave balance.

Reserved
Days held on a balance while a request is pending.

Sandwich rule
Weekly offs or holidays between two leave days are charged as leave.

Carry forward
Unused leave moved into the next leave year.

Encashment
Paying out unused leave days.

Comp-off
Leave earned for working on a weekly off or holiday.

Shift
A defined working time, such as General 09:30 to 18:30.

Work pattern
Weekly offs or a rotation that repeats.

Roster
A team's planned shifts for a period.

Open shift
An unfilled duty that qualified people can claim.

Swap
Two employees exchanging duties, with approval.

Optional holiday
A holiday each employee may choose, up to a limit.

Allocation
A share of a person's time assigned to a project.

Utilisation
Approved hours divided by available capacity.