USER GUIDE

Leadership and Analytics Guide

See how your organisation is doing — headcount, attrition, attendance, cost and engagement — run and share reports, and decide what is waiting for you.

WHO IT'S FOR

Leaders, senior managers and auditors

COVERS

Leadership view, dashboards, reports, team and engagement insights, workforce planning, approvals, auditor access

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

About this guide

This guide is for **leaders**: chief executives, business heads and senior managers who need a clear picture of their people without digging through records. It also has a chapter for **auditors**, who can look at almost everything in HR4ON but change nothing.

Leadership screens show totals, rates and trends. To protect privacy, groups smaller than a few people are not broken down, and salary cost is only shown to people who hold salary access as well. Everything you see stays within your own scope: your companies, your part of the organisation or your team.

Most of what a leader does in HR4ON takes a minute on a phone: glance at the numbers, approve what is waiting, and share a report.

What you can do in HR4ON

- See headcount, joiners, leavers, attrition, attendance, leave, overtime and expense spend at a glance
- Use dashboards with period comparisons and trends
- Find, filter, group and export reports, and share them as PDF
- Look at your team's attendance, leave, timesheets, expenses and assets
- Follow engagement: announcements, surveys and recognition
- Review positions, vacancies and workforce plans
- Approve, reject or return requests, on desktop or phone
- As an auditor, find records and their full history without changing anything

Before you start

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

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

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

The screenshots use the HR4ON demonstration company, so the names, numbers and dates are examples. Screenshots were taken as Aarav Mehta (chief executive, leadership and manager access across both demo companies) and, in the last chapter, Neha Joshi (auditor).

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01 Your home page

Your home page puts the leadership numbers and the decisions waiting for you next to your own day.

1.1 What leaders see on Home

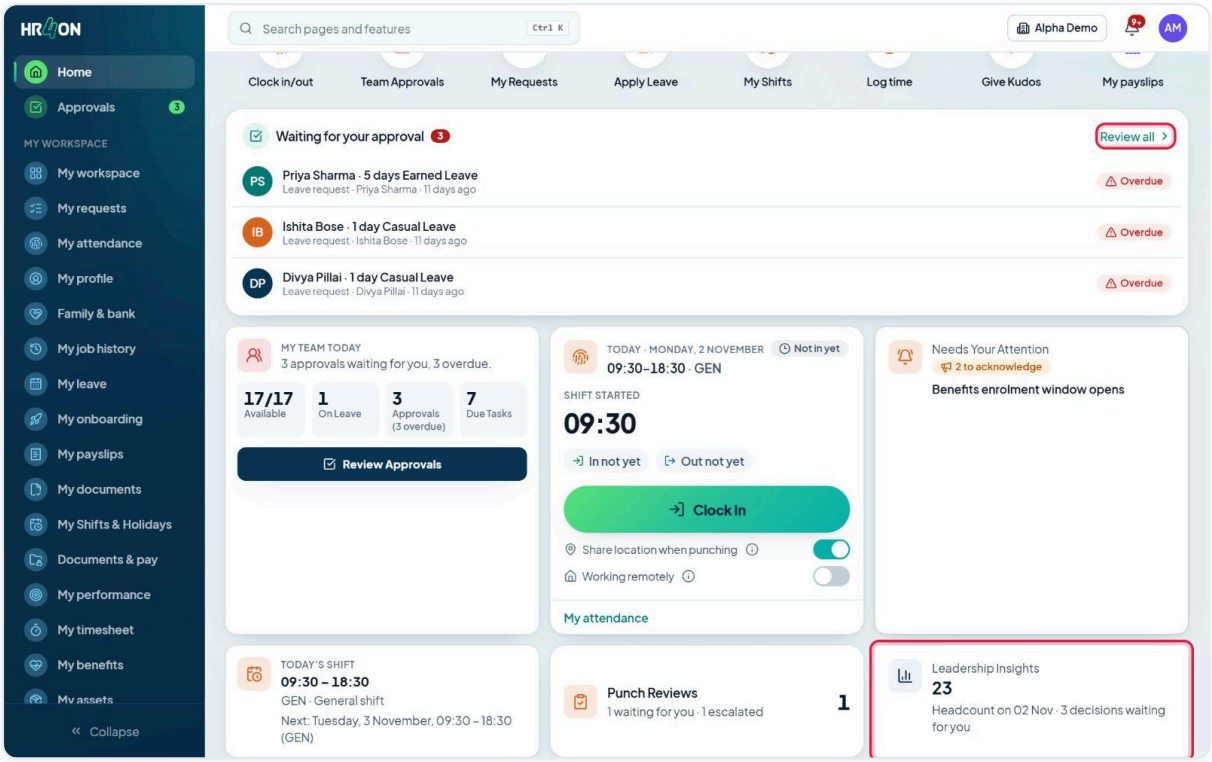
As well as your own attendance, leave and pay, Home shows what needs your decision and a headline from your leadership insights.

WHAT YOU SEE

- **Waiting for your approval**: the requests you need to decide, oldest first, with **Overdue** flags.
- **My team today**: who is available or on leave, approvals waiting and team tasks due.
- **Leadership Insights**: today's headcount and how many decisions are waiting; select it to open the full view.
- **Quick actions**: shortcuts such as **Team Approvals** and **Give Kudos**.

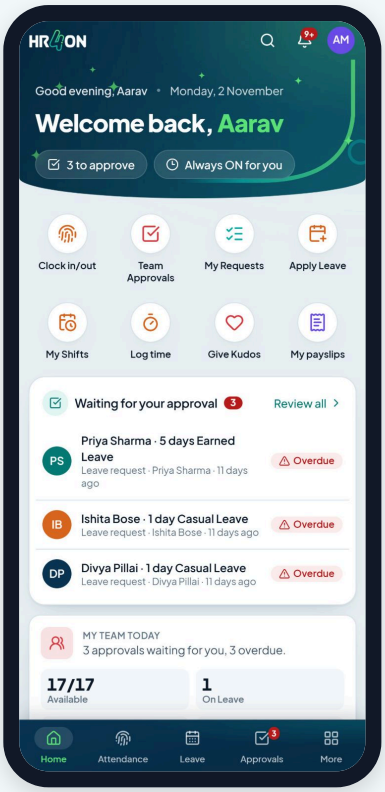
HOW TO DO IT

1. Sign in. Home opens.
2. Select **Review all** to open your approvals, or **Leadership Insights** for the numbers.



ON YOUR PHONE

Home on a phone. Approvals and insights are near the top.



02 Leadership view

The leadership view is a one-page summary of your organisation for a period: headcount, movement, attendance, leave, overtime and spend, with a six-month trend and a department breakdown.

2.1 Read the headline numbers

Use the leadership view for a monthly review or before a leadership meeting.

WHAT YOU SEE

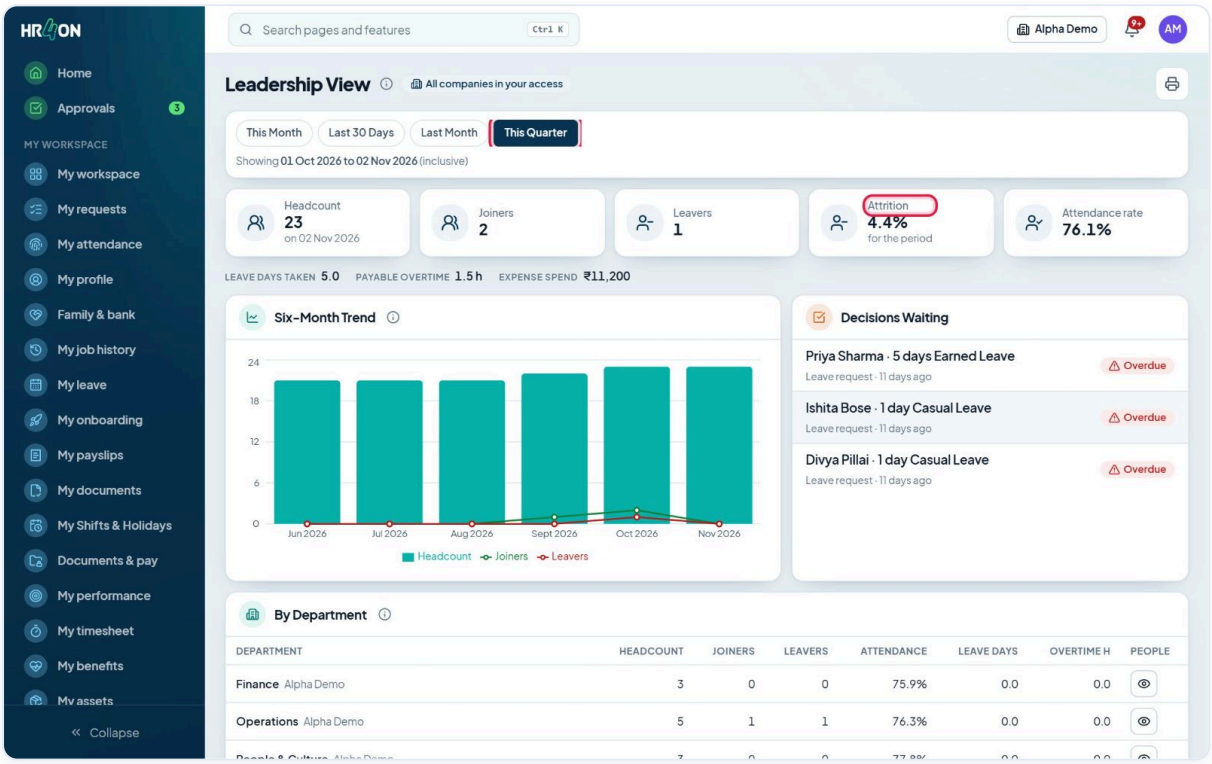
- **Headcount**: people employed on the last day of the period.
- **Joiners** and **Leavers**: people who started or left in the period.
- **Attrition**: leavers as a percentage of average headcount for the period.
- **Attendance rate**, **Leave days taken**, **Payable overtime** and **Expense spend** for the period.
- The top line shows your scope, for example **All companies in your access**.

HOW TO DO IT

1. Open **Leadership View** from Insights in the menu (or select **Leadership Insights** on Home).
2. Choose the period: **This Month**, **Last 30 Days**, **Last Month** or **This Quarter**. The line below shows the exact dates included.

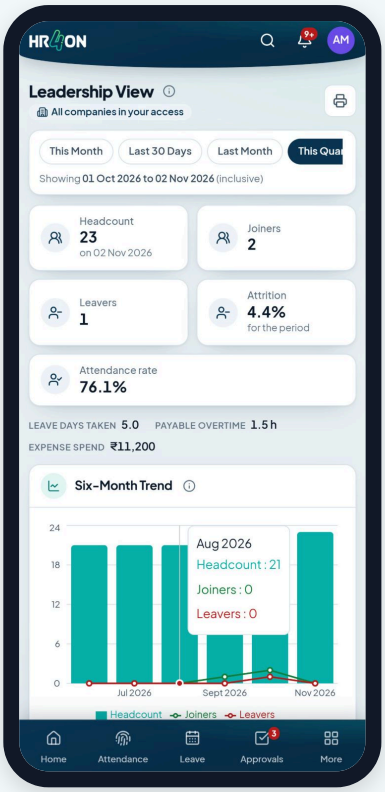
GOOD TO KNOW

- These are totals only. Salary cost is not shown here unless you also hold salary access.



ON YOUR PHONE

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



2.2 Trend, decisions and departments

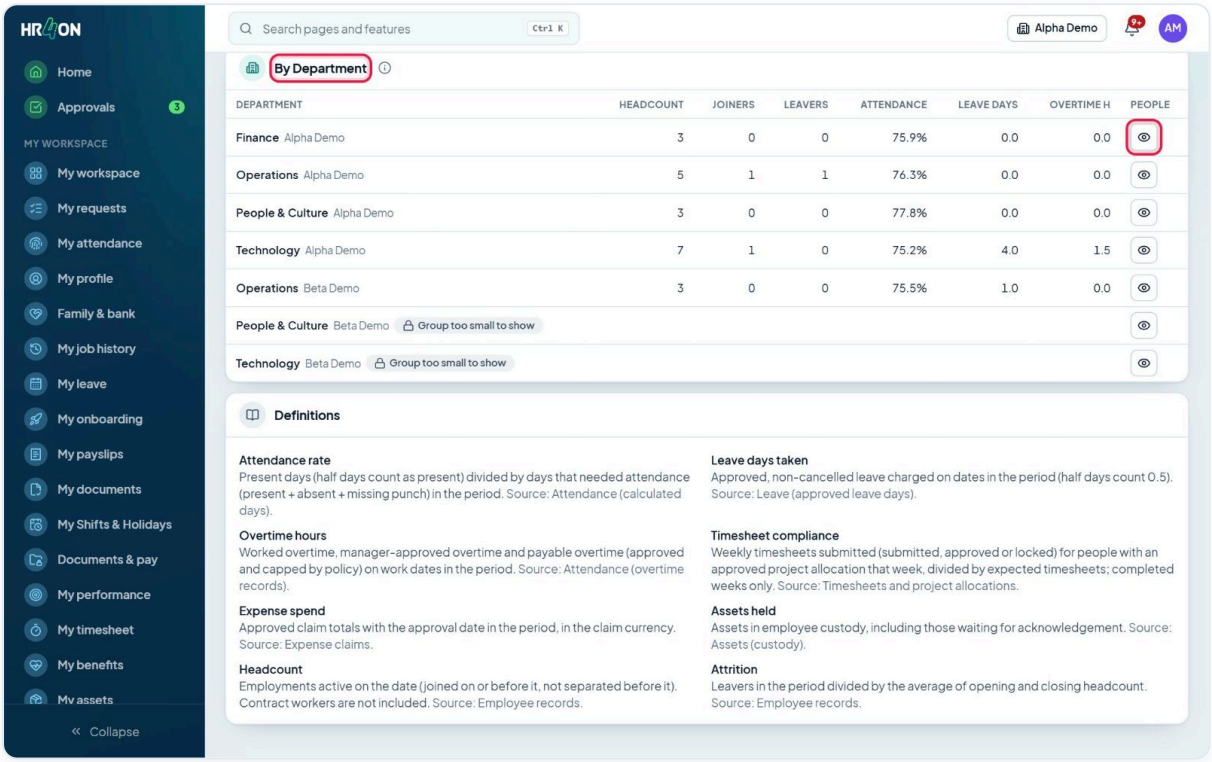
Below the headline numbers you see how headcount has moved over six months, what is waiting for your decision, and how each department compares.

WHAT YOU SEE

- **Six-Month Trend**: headcount at each month end (bars) with joiners and leavers (lines).
- **Decisions Waiting**: requests that need you, with overdue flags.
- **By Department**: headcount, joiners, leavers, attendance, leave days and overtime for each department.
- **Group too small to show**: a department with too few people to report without identifying someone.
- **Definitions**: exactly how each number is calculated and where it comes from.

HOW TO DO IT

1. Scroll down the leadership view.
2. Select the eye button (**People in …**) on a department to list the people behind the numbers, within your access.



2.3 Print or share as PDF

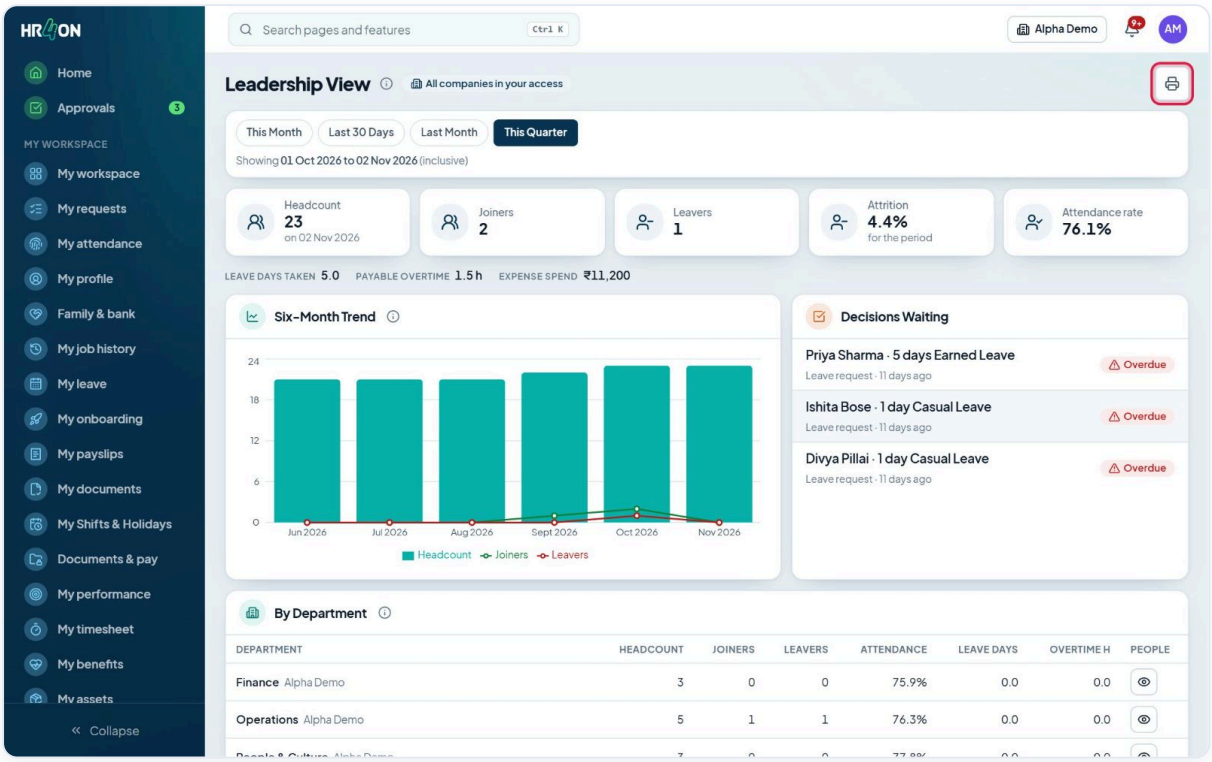
Every insight page and report can be printed or shared as a branded PDF, for example to attach to board papers.

HOW TO DO IT

1. Select **Print** (printer icon) at the top right.
2. On reports and lists, use **Share PDF** to share a PDF from your phone or computer, or **Download PDF** to save it.

GOOD TO KNOW

- A PDF shows what you can see. Share it only with people allowed to see the same information.



03 Dashboards

Dashboards show the key measures for your role, compared with the previous period, with trends and breakdowns.

3.1 Leadership Insights dashboard

The leadership dashboard covers headcount, attrition, joiners, exits, absence, active applications, vacancy rate and survey participation.

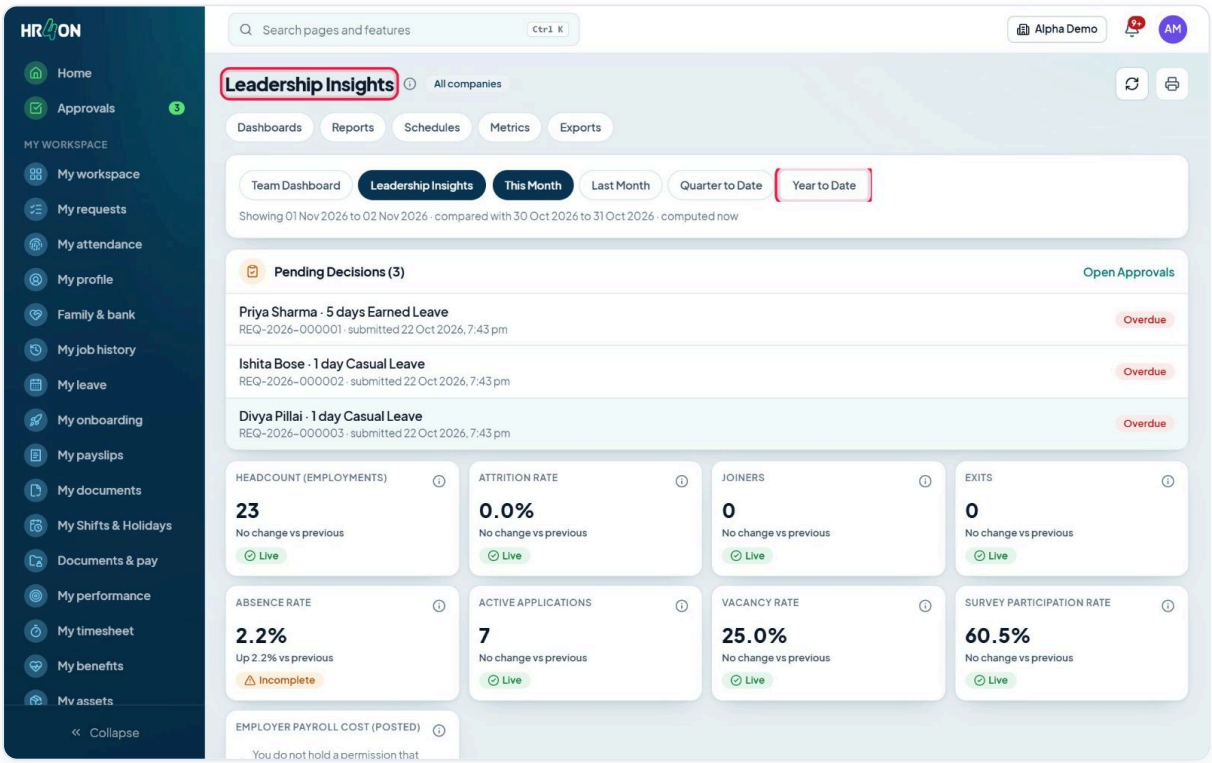
WHAT YOU SEE

- Each tile shows the value, the change against the previous period (for example **No change vs previous** or **Up 2.2% vs previous**), and how fresh the data is: **Live**, **Delayed** or **Incomplete**.
- **Unavailable** means you do not hold the access that covers that data, such as payroll cost.
- Below the tiles: trends over twelve months and breakdowns, for example headcount by department.

HOW TO DO IT

1. Open **Dashboards** under Insights.
2. Select **Leadership Insights** (or **Team Dashboard** for your own team).
3. Choose **This Month**, **Last Month**, **Quarter to Date** or **Year to Date**.
4. Select the information button on a tile (**Definition and lineage**) to see how it is calculated.

> **TIP**
> - Select **Recalculate** if you have just made changes and want the latest numbers now.

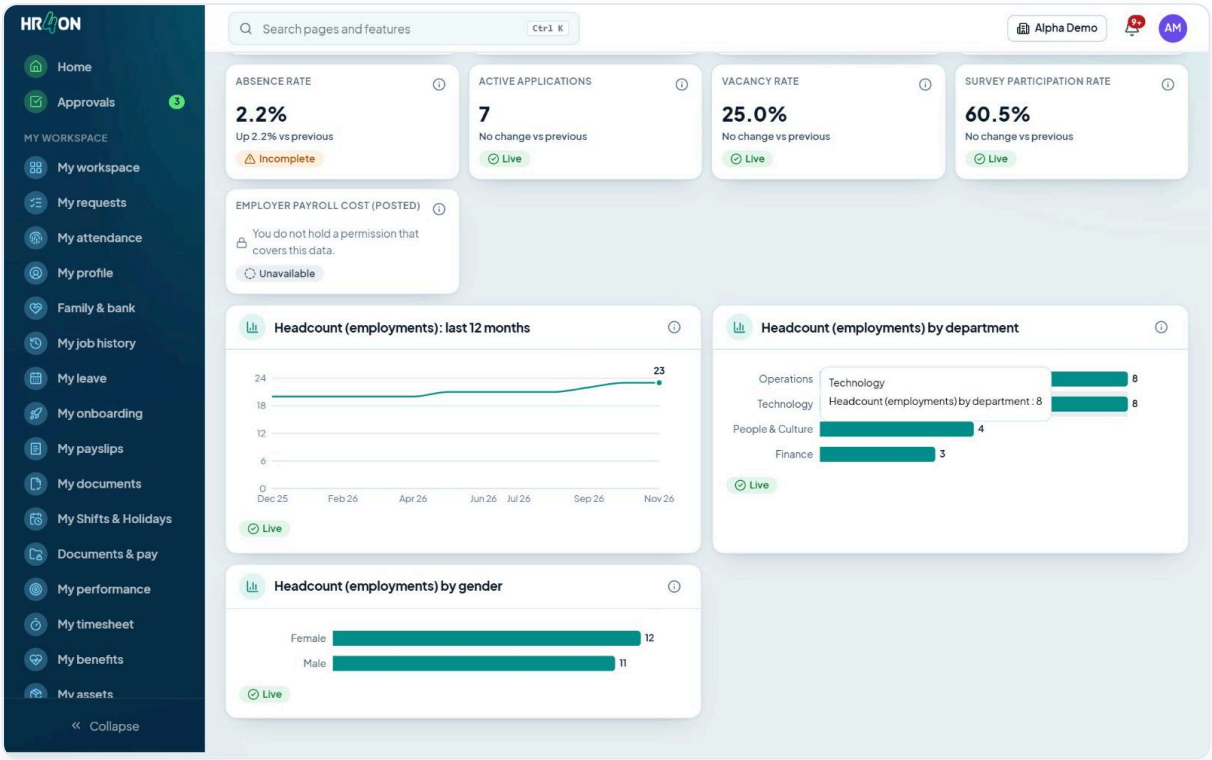


3.2 Headcount and attrition trends

Scroll the dashboard to see headcount over the last twelve months and by department.

TIP

- Select a bar or tile to drill down to the detail behind it, within your access.

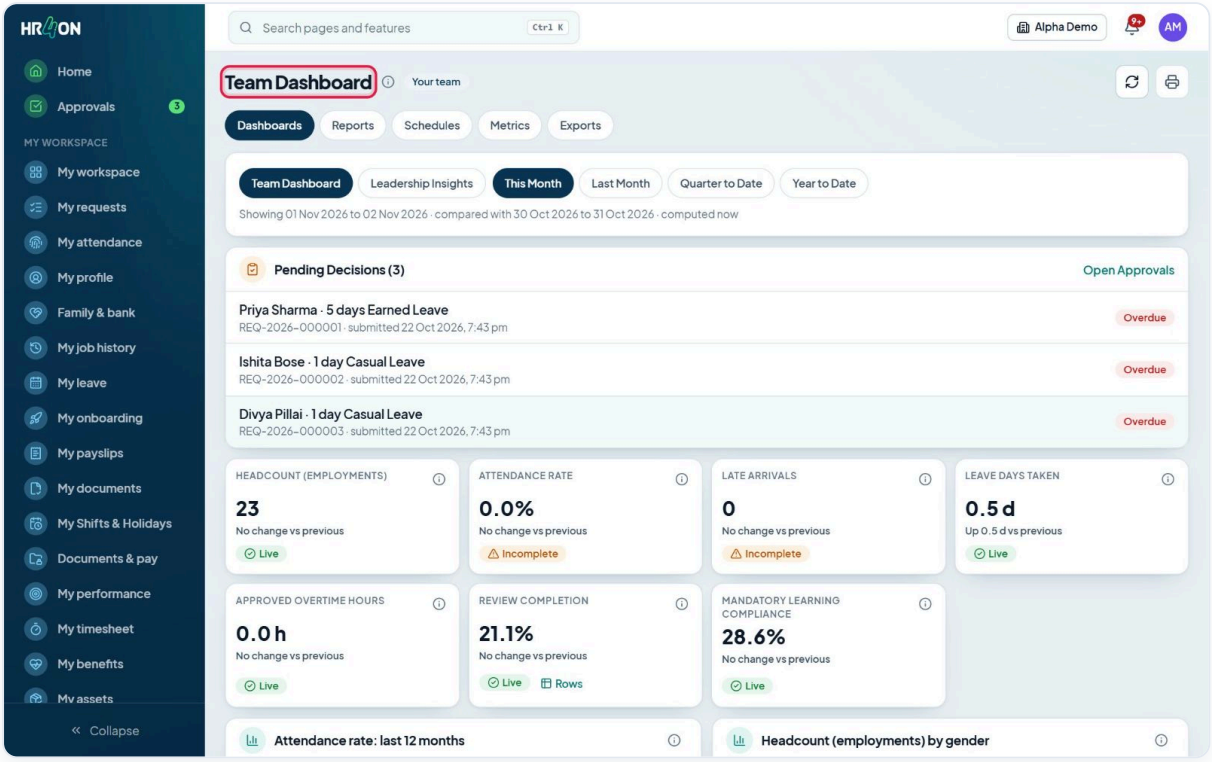


3.3 Team Dashboard

The team dashboard covers the people who report to you: attendance, late arrivals, leave, overtime, review completion and mandatory learning.

HOW TO DO IT

1. Open **Dashboards** and select **Team Dashboard**.



04 Reports

Reports give you the detail behind the dashboards. Each report says what one row means, which date it uses and who owns it, so you can trust what you read.

4.1 Find a report

The report catalogue lists only the reports whose data you may read, grouped by task.

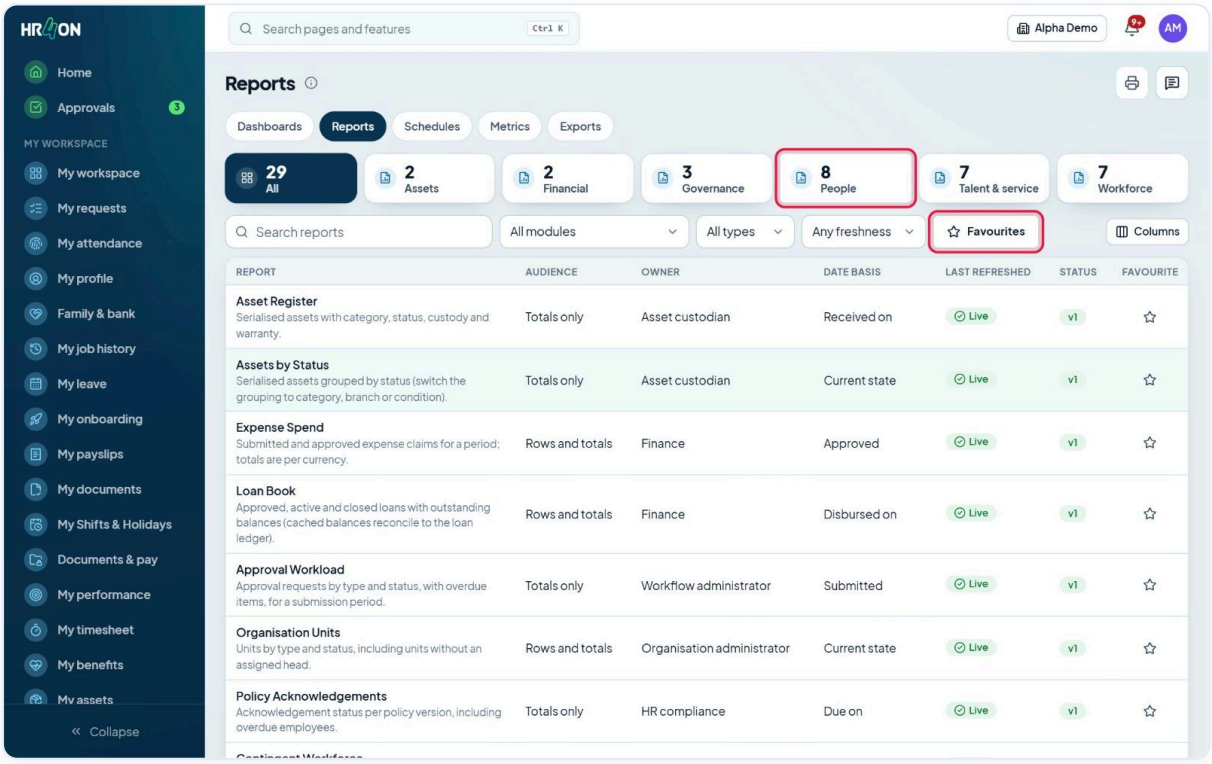
WHAT YOU SEE

- Group tabs such as **People**, **Workforce**, **Talent & service**, **Financial**, **Assets** and **Governance**.
- **AUDIENCE**: **Rows and totals** (you see individual records) or **Totals only** (approved summaries without individual rows).
- **DATE BASIS**: which date the report filters on, for example **Joined on** or **As of date**.
- **LAST REFRESHED**: **Live**, **Delayed** or **Incomplete**.

HOW TO DO IT

1. Open **Reports** under Insights.
2. Select a group tab, or search by name.
3. Use the star to add a report to your **Favourites**.
4. Select a report to open it.

> **TIP**
> - Not sure which report you need? Select **Ask a question** (speech bubble) and type, for example, "how many people left last quarter".



4.2 Run a report: headcount by department

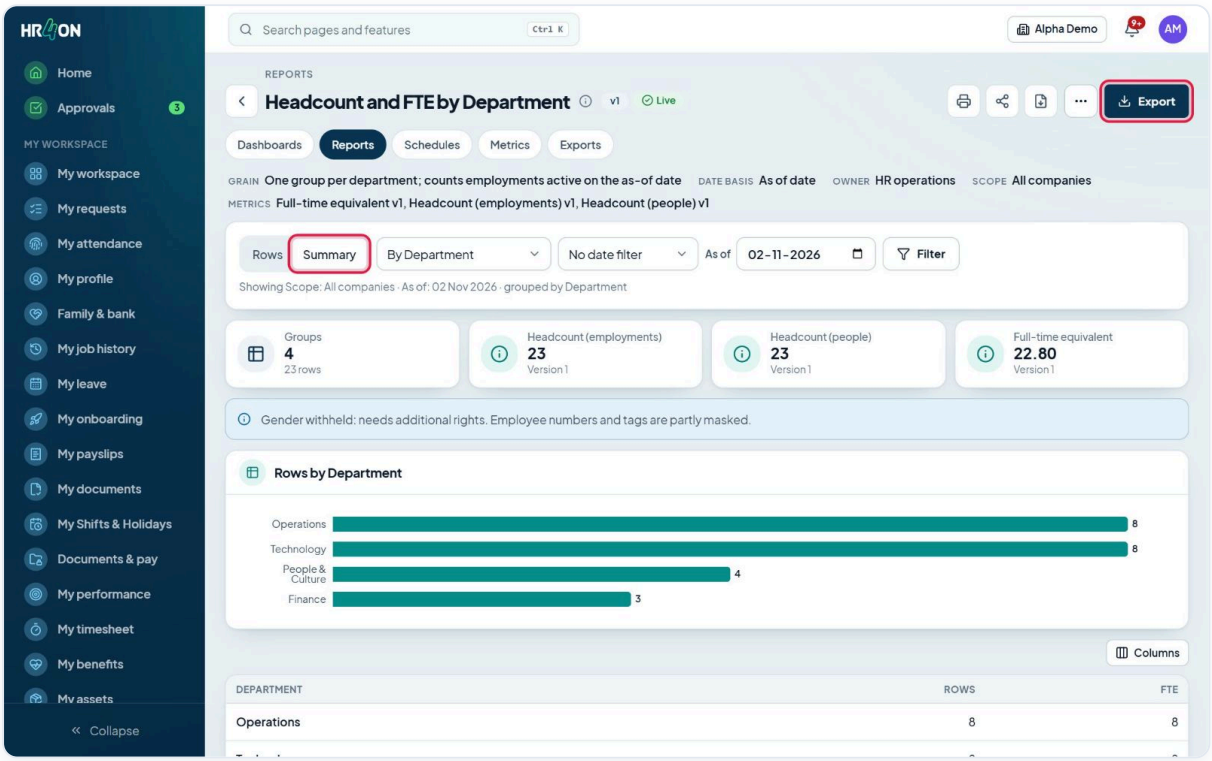
A report opens with its default settings. The header explains it; the body shows the numbers.

WHAT YOU SEE

- **GRAIN**: what one row is, for example one group per department.
- **DATE BASIS**, **OWNER**, **SCOPE** and **METRICS** (with their versions).
- **Rows** shows the list; **Summary** groups it, for example **By Department**, **By Grade** or **By Gender**.
- Some fields are masked or withheld unless you hold extra rights; the report says so.

HOW TO DO IT

1. Open **Headcount and FTE by Department**.
2. Choose **Summary** and a grouping such as **By Department** or **By Location**.
3. Choose the date: **As of** a date, or a range on **Joined on** or **Last working day**.



4.3 Filter a report: joiners and exits

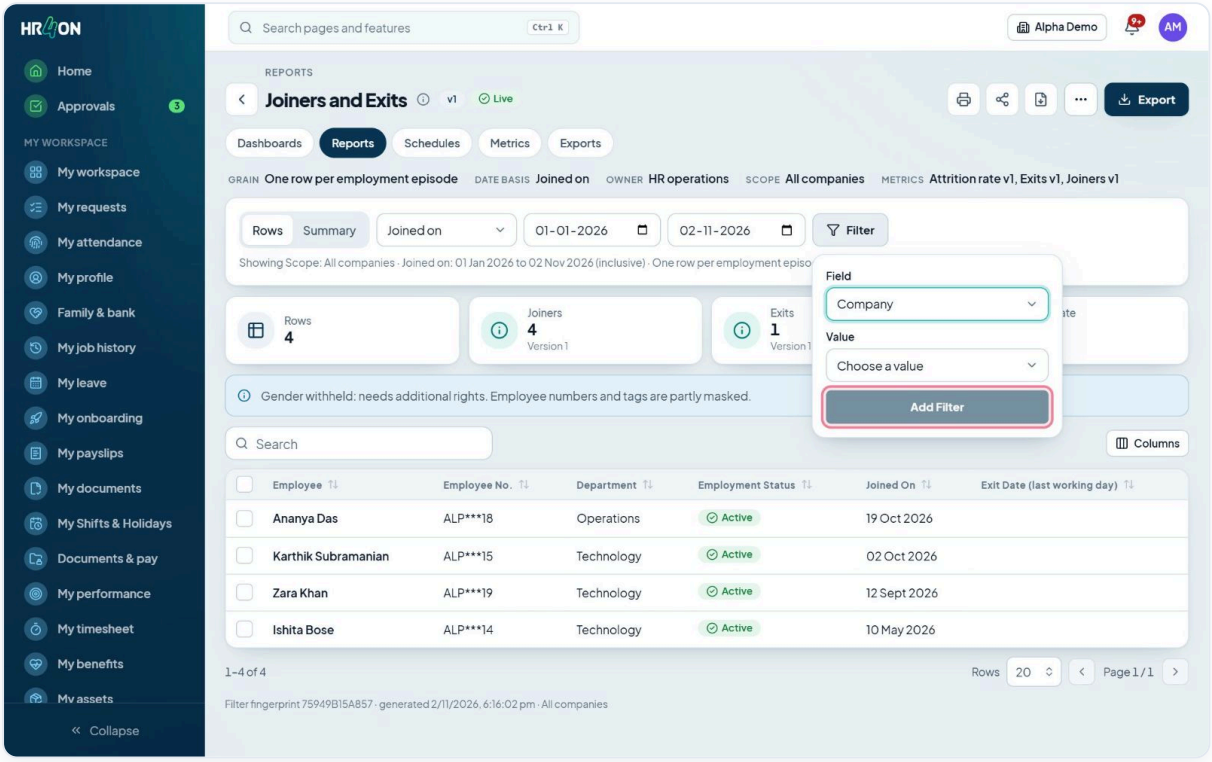
Filters narrow a report to the people you care about, for example one department or one employment status.

HOW TO DO IT

1. Open **Joiners and Exits**.
2. Set the date range under **Joined on**.
3. Select **Filter**, choose a **Field** and **Value**, and select **Add Filter**.
4. The line under the header (**Showing …**) always tells you exactly what is included.

GOOD TO KNOW

- Employee numbers may be partly masked in reports unless you hold access to them.



4.4 Export, save a view and schedule

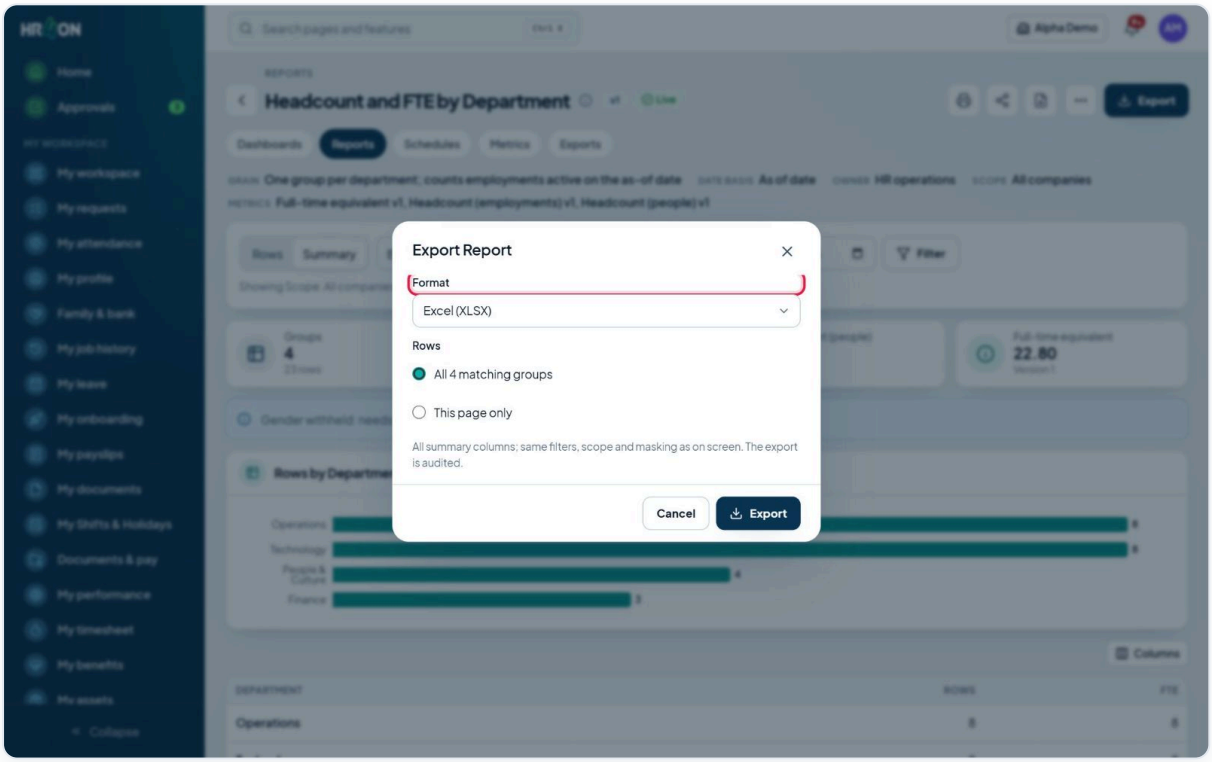
Take a report away as a spreadsheet, keep your settings for next time, or have it sent to you regularly.

HOW TO DO IT

1. Select **Export**, choose the **Format** (for example **Excel (XLSX)**) and the **Rows** (all matching rows, or this page only), then select **Export**. The file uses the same filters, scope and masking as the screen, and appears under **Exports**.
2. Open **More actions** and choose **Save View**, give it a **Name**, and tick **Open this view by default** if you like.
3. Choose **Schedule** in **More actions** to have the report delivered on a regular basis. Manage schedules on the **Schedules** tab.
4. Use **Print**, **Share PDF** or **Download PDF** for a PDF copy.

GOOD TO KNOW

- Every export is recorded in the audit log.

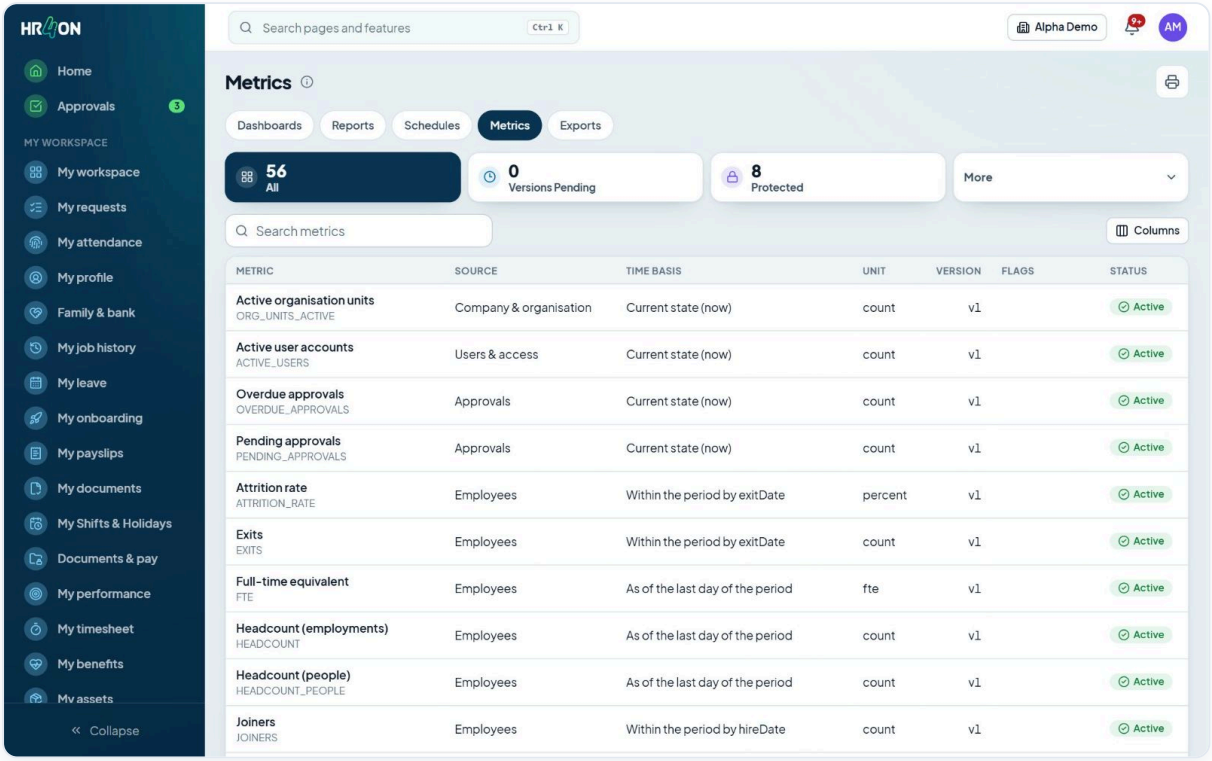


4.5 Metrics catalogue

The metrics catalogue is the dictionary behind every number: what each measure means, how it is calculated and which version is in use.

HOW TO DO IT

1. Open **Metrics** under Dashboards and reports.
2. Select a metric, for example **Headcount (employments)**, to see its definition.



05 Team insights

Team insights show how your own team is doing — attendance, leave, overtime, timesheets, expenses and equipment — with a line for each team member.

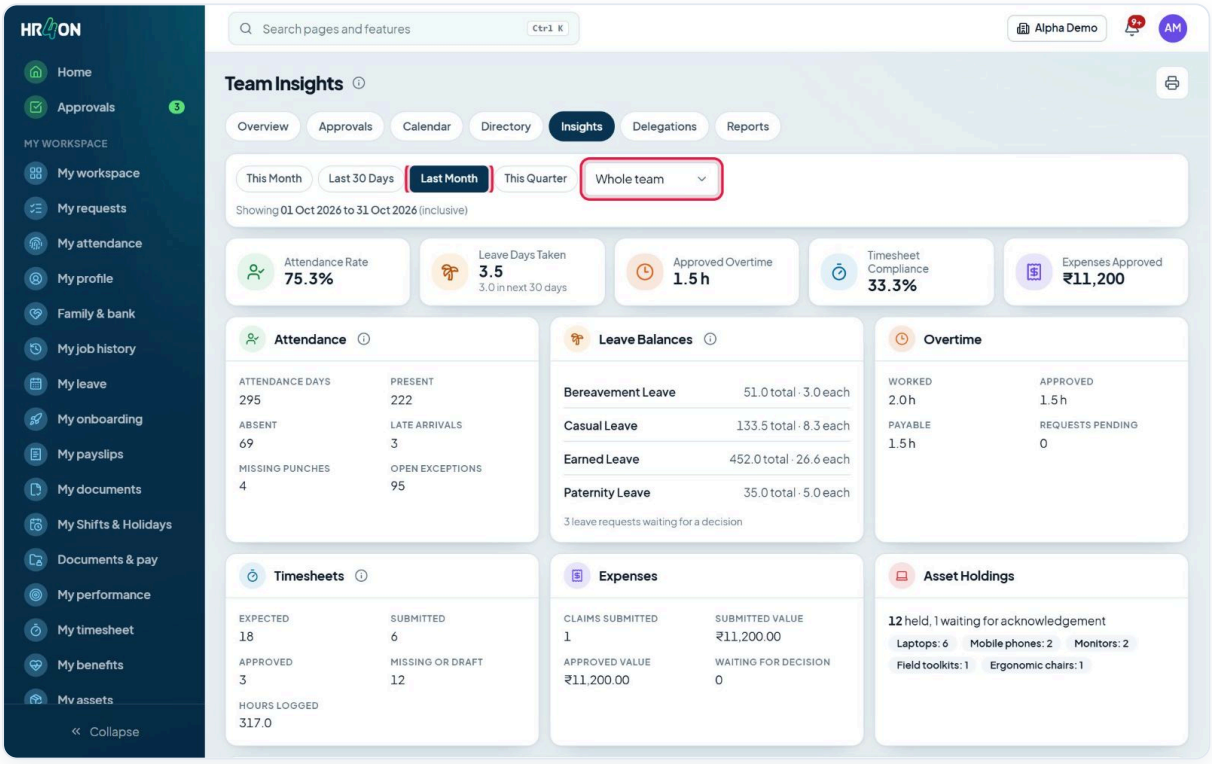
5.1 Read team insights

WHAT YOU SEE

- Choose the period and who to include: **Whole team**, **Direct reports**, **Indirect reports** or **Matrix**. Early in a month, **Last Month** gives a fuller picture.
- Headline tiles: **Attendance Rate**, **Leave Days Taken**, **Approved Overtime**, **Timesheet Compliance** and **Expenses Approved**.
- Panels for **Attendance**, **Leave Balances**, **Overtime**, **Timesheets**, **Expenses** and **Asset Holdings**.
- **By Team Member**: late arrivals, absences, missing punches, leave, overtime and missing timesheets per person.

HOW TO DO IT

1. Open **My team** and select the **Insights** tab.
2. Choose the period and team filter.

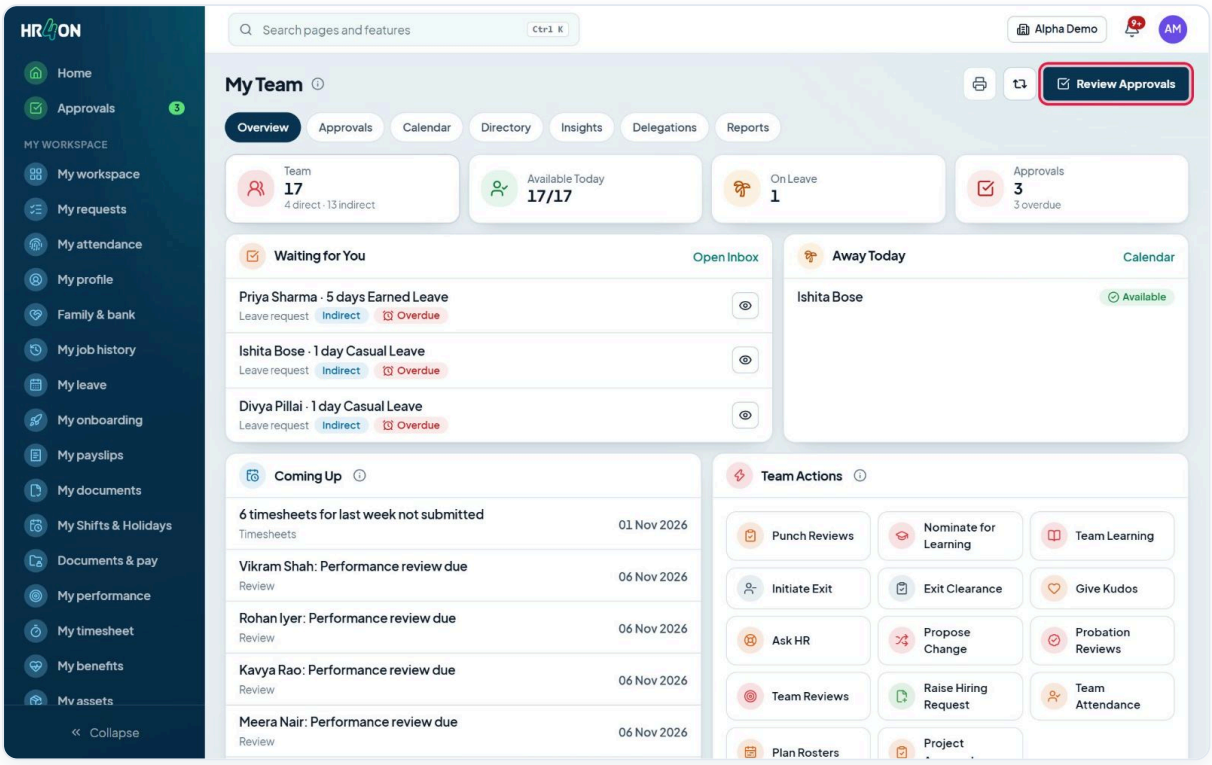


5.2 Your team overview

The team overview is your day-to-day view: who is available, who is away, what is waiting and what is coming up.

HOW TO DO IT

1. Open **My team**.
2. Use **Review Approvals** to decide what is waiting.
3. Use **Team Actions** for common jobs such as **Give Kudos**, **Raise Hiring Request** or **Initiate Exit**.



06 Engagement insights

Engagement insights tell you whether people are reading announcements, answering surveys and recognising each other.

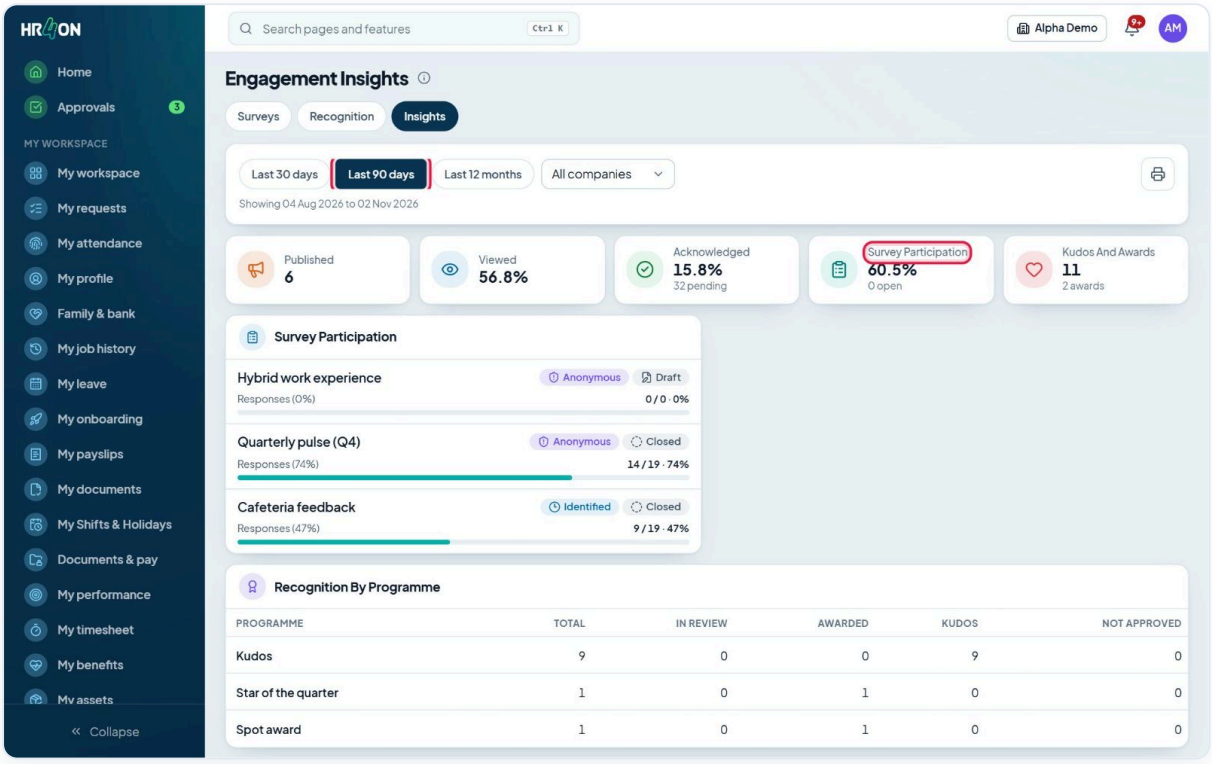
6.1 Read engagement insights

WHAT YOU SEE

- **Published**, **Viewed** and **Acknowledged**: how many announcements went out and how many people read or confirmed them.
- **Survey Participation**: response rates for each survey. Anonymous surveys never show who answered.
- **Kudos And Awards** and **Recognition By Programme**: recognition given in the period.

HOW TO DO IT

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



07 Workforce planning

Workforce planning compares approved positions with the people you actually have, so you can see vacancies, over-hiring and the cost of plans.

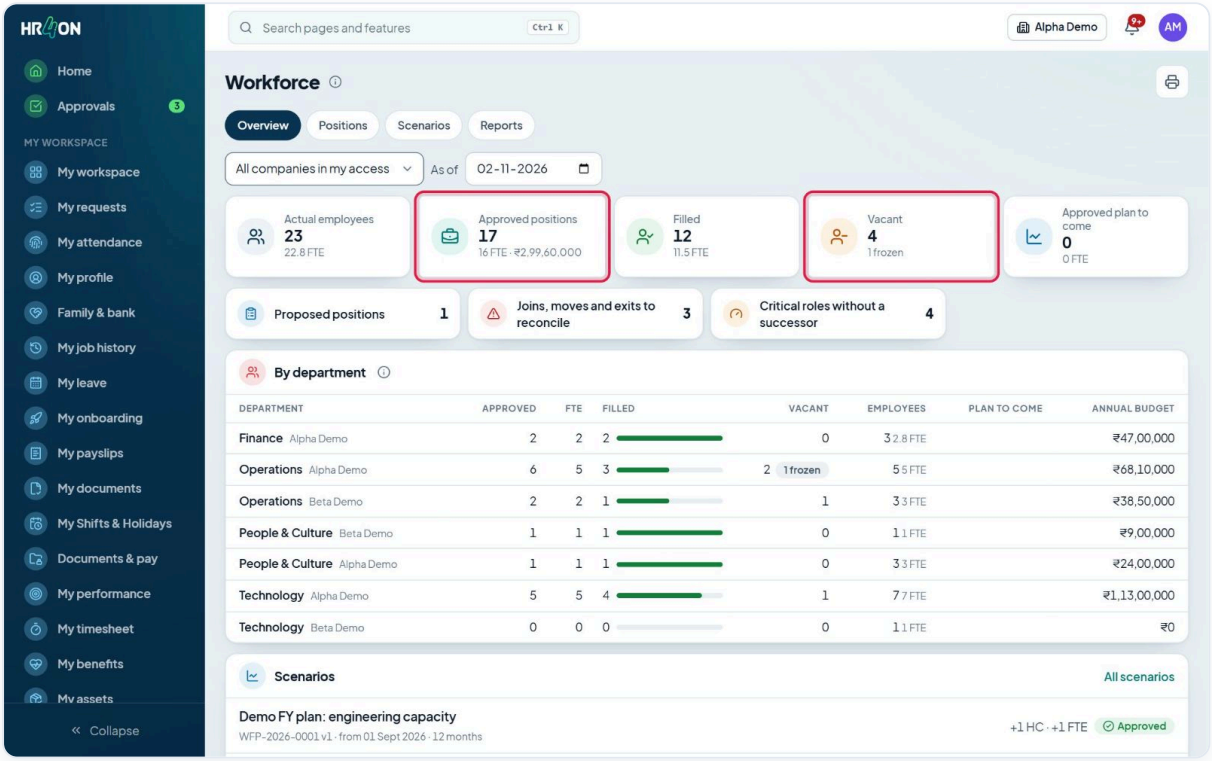
7.1 Workforce overview

WHAT YOU SEE

- **Actual employees** against **Approved positions**, with FTE and annual budget.
- **Filled**, **Vacant** (including frozen) and **Approved plan to come**.
- **Joins, moves and exits to reconcile** and **Critical roles without a successor**.
- **By department**: approved, filled and vacant positions with budget for each department.

HOW TO DO IT

1. Open **Workforce planning** under Grow.
2. Choose a company or **All companies in my access**, and an **As of** date.



7.2 Positions and vacancies

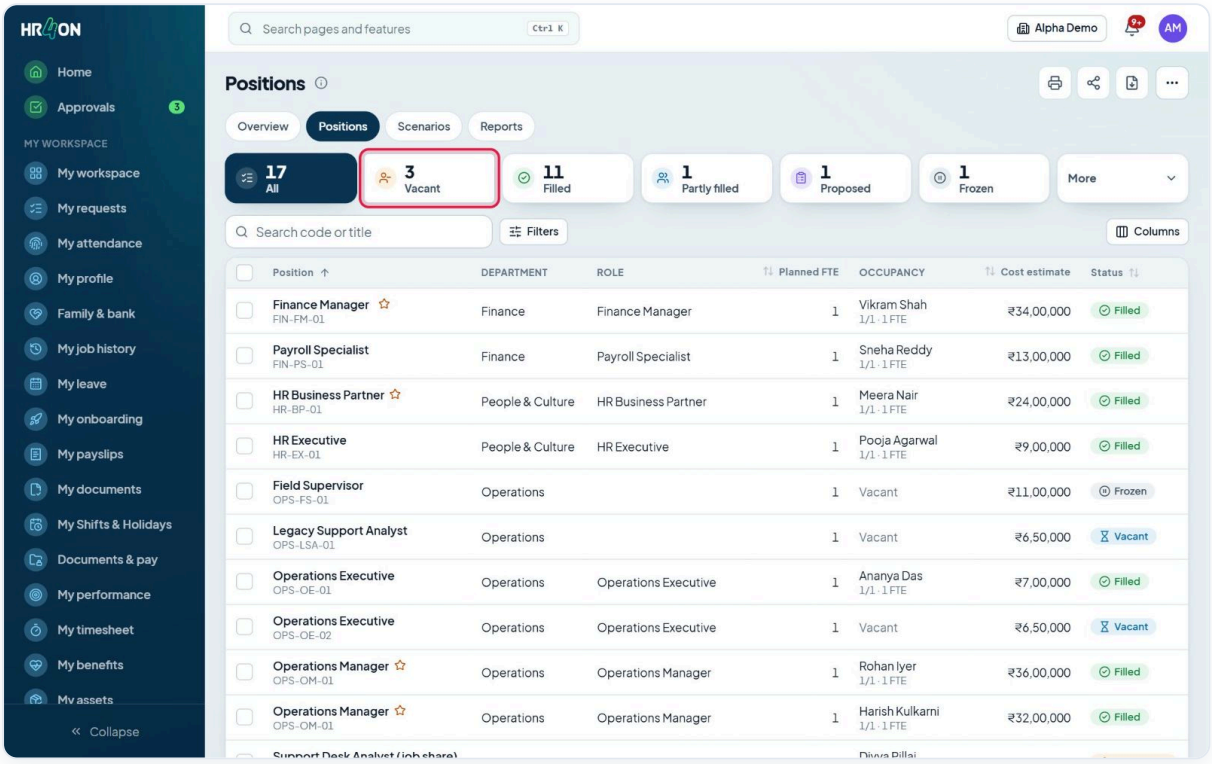
The positions list shows every approved role, who fills it and what it costs.

WHAT YOU SEE

- Count tabs: **Vacant**, **Filled**, **Partly filled**, **Proposed** and **Frozen**.
- **OCCUPANCY**: who holds the position and at what FTE.

HOW TO DO IT

1. Open the **Positions** tab.
2. Select **Vacant** to see open roles.

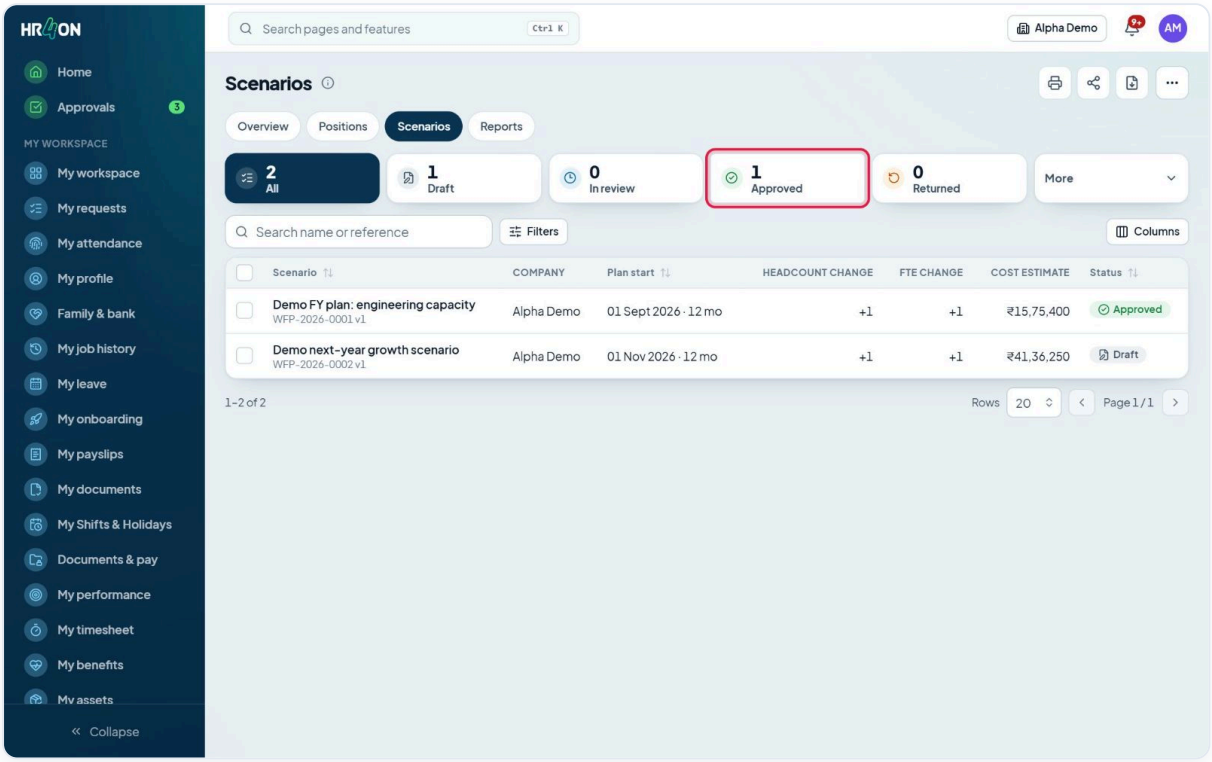


7.3 Scenarios and budget reviews

A scenario is a proposed plan, for example adding engineering capacity next year, with its headcount, FTE and cost. Leaders review and approve scenarios.

HOW TO DO IT

1. Open the **Scenarios** tab.
2. Open a scenario to see the changes and their cost.
3. When a scenario is sent for review, it appears in your approvals.



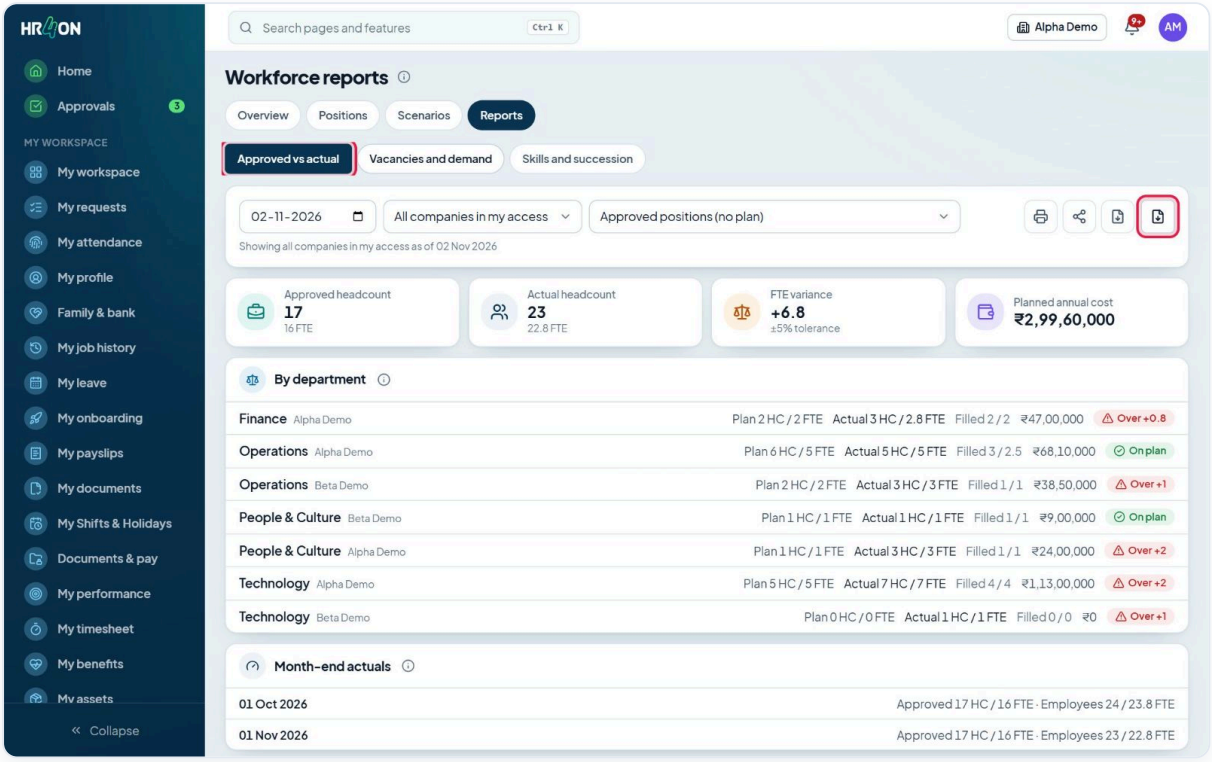
7.4 Workforce reports

WHAT YOU SEE

- **Approved vs actual**: plan against real headcount and FTE by department, with a tolerance.
- **Vacancies and demand**.
- **Skills and succession**.

HOW TO DO IT

1. Open the **Reports** tab.
2. Choose a report and use **Download CSV** or **Share PDF**.



08 Approvals

Requests come to you because you are someone's manager, their manager's manager, or because a workflow names your role, for example large expenses, job offers or workforce plans.

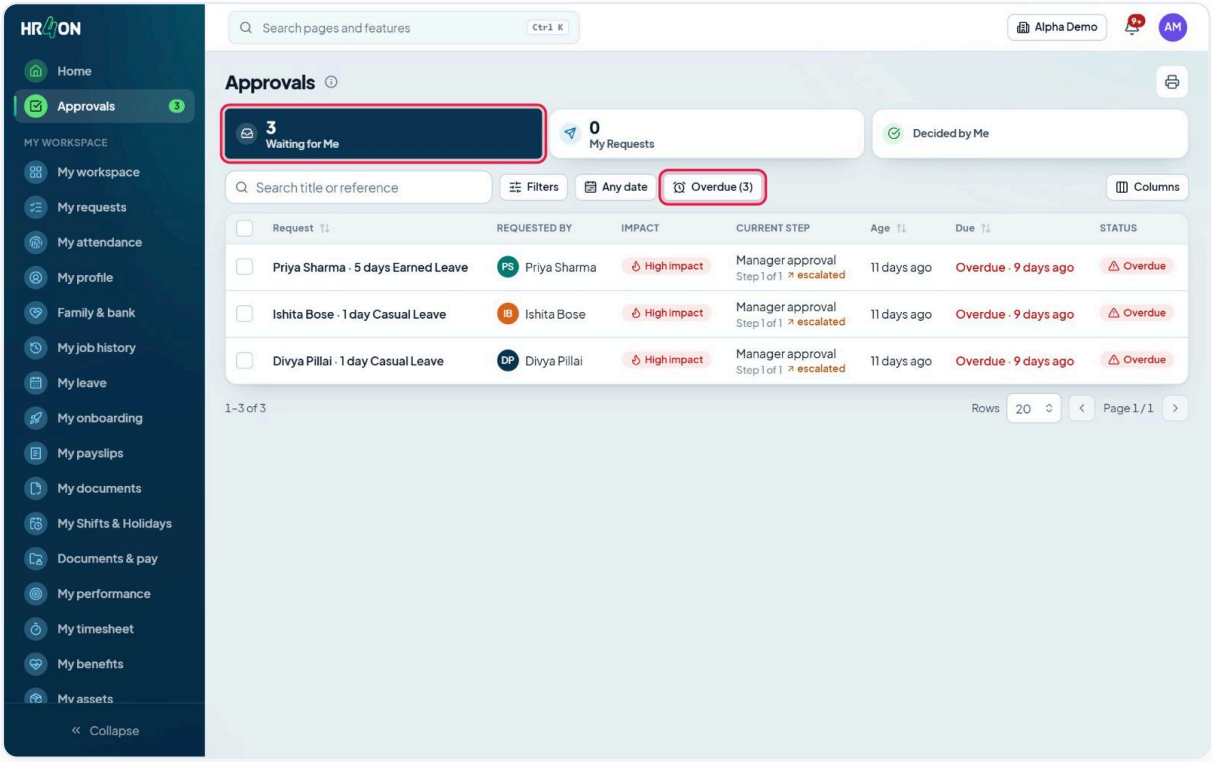
8.1 Your approvals inbox

WHAT YOU SEE

- **Waiting for Me**: requests you need to decide.
- **My Requests**: your own requests.
- **Decided by Me**: your past decisions.
- **High impact**: large amounts or sensitive changes.
- **Overdue** and **escalated**: past the due time. Escalated requests came to you because the first approver did not act.

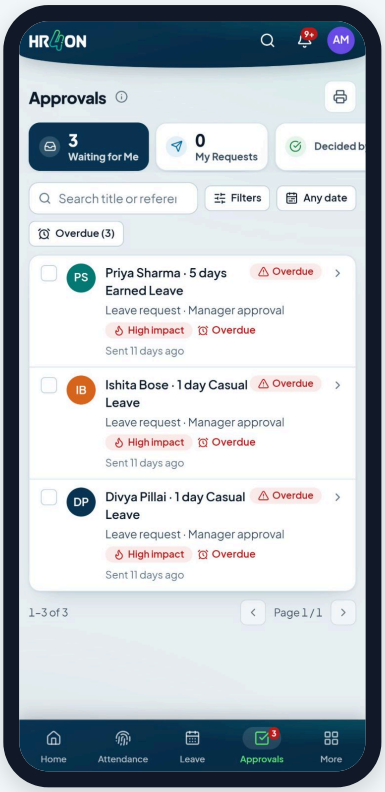
HOW TO DO IT

1. Select **Approvals** in the menu (or on the phone tab bar).
2. Select **Overdue** to see the oldest first.
3. Select a request to open it.



ON YOUR PHONE

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



8.2 Decide a request

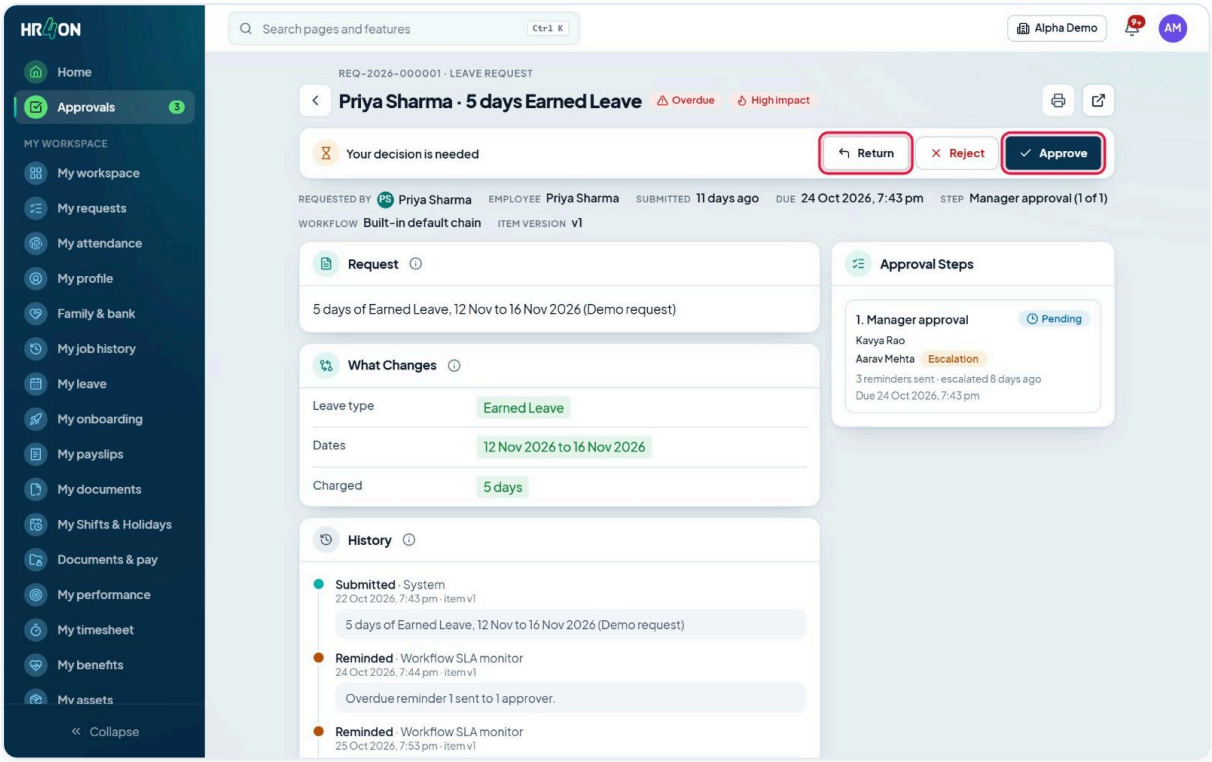
The request page shows what is being asked, what changes if you approve, and the full history, including reminders and escalations.

HOW TO DO IT

1. Read **Request** and **What Changes**.
2. Check the **History** for earlier decisions or comments.
3. Select **Approve**, **Reject** or **Return** (send back for changes). Add a comment; a reason is required to reject or return.

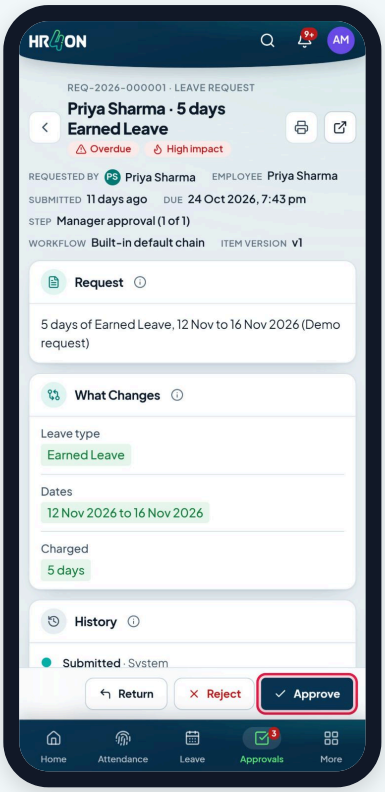
GOOD TO KNOW

- You cannot approve your own request.
- The employee is notified of your decision straight away.
- If you will be away, set up a delegation from **Delegations** in My workspace so requests do not wait.



ON YOUR PHONE

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



09 For auditors: read-only access

Auditors can open records across HR4ON — employees, leave, payroll, expenses, separations, assets, access and the audit log — but cannot create, change, approve or delete anything. Screenshots in this chapter were taken as Neha Joshi, auditor.

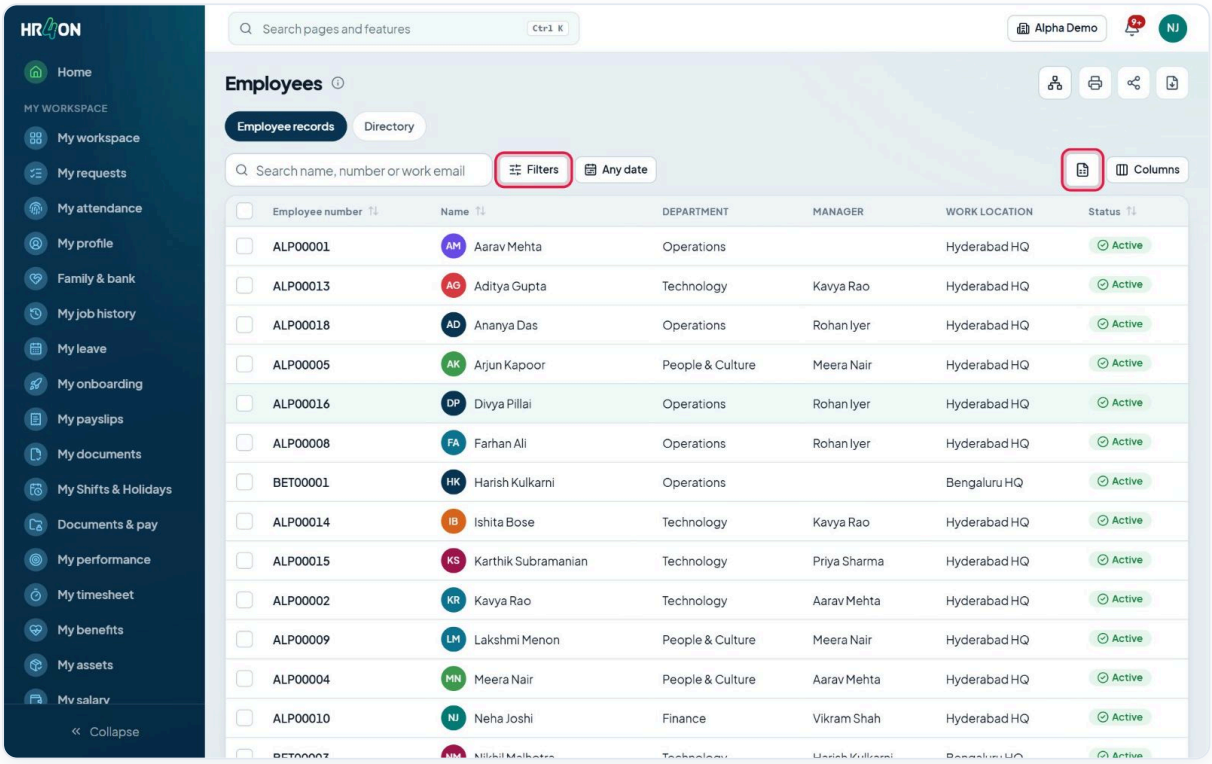
9.1 What an auditor can and cannot do

WHAT YOU SEE

- **Can**: open lists and records in every module within the audit scope, see history and approvals, run reports and export them.
- **Cannot**: create, edit, approve, reject or delete. Buttons that change data are not shown.
- Salary amounts, bank details and restricted cases stay masked unless the auditor has also been given that access.
- Every record the auditor opens or exports is itself recorded in the audit log.

HOW TO DO IT

1. Use the menu as normal. Pages open in read-only mode.



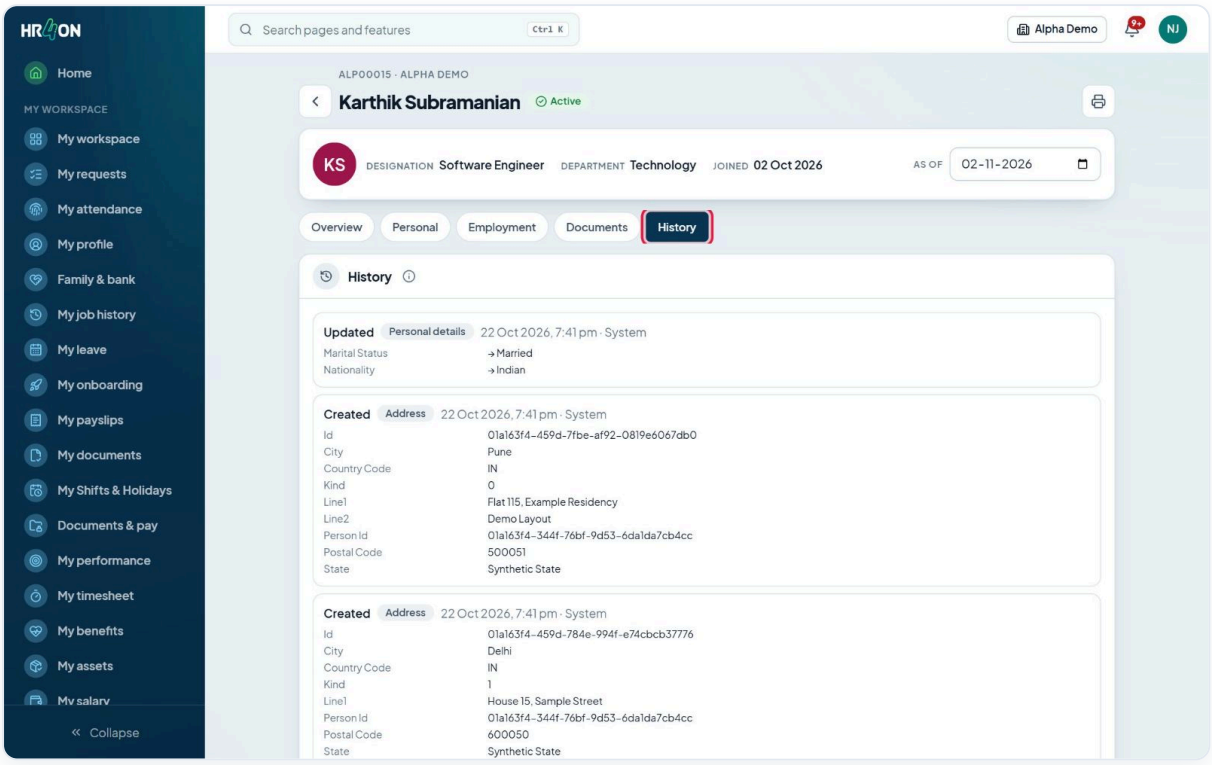
The employee list for an auditor: search, filter and export, but no **Add employee** button.

9.2 Find a record and its history

Open any employee to see their profile, employment, documents and a full history of changes.

HOW TO DO IT

1. Open **Employees** and search for the person.
2. Open their record.
3. Select the **History** tab to see every dated change: who made it, when, and what changed.



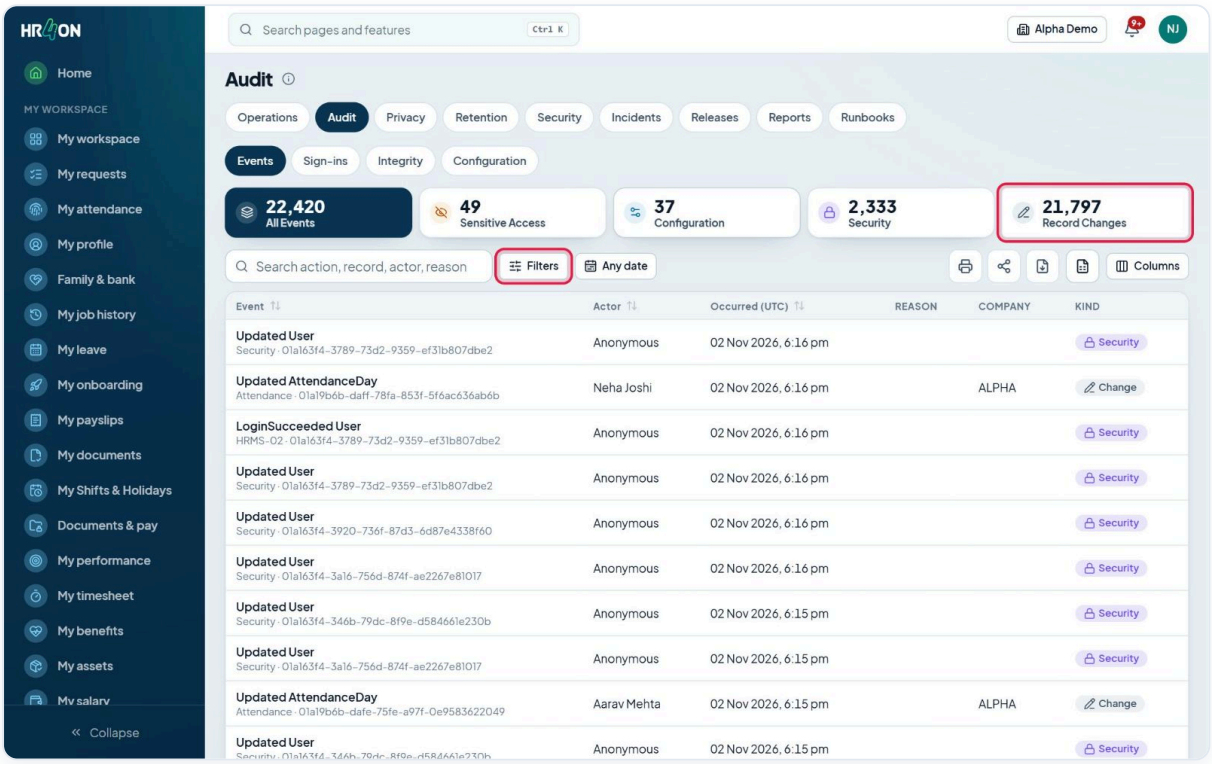
9.3 The audit log

The audit log under Governance lists every change and every sensitive view in HR4ON.

HOW TO DO IT

1. Open **Governance** and select **Audit**.
2. Use the count tabs (**Sensitive Access**, **Configuration**, **Security**, **Record Changes**) and **Filters** to narrow by module, person, record or date.
3. Open an event to see the before and after values and the reason given.
4. Select **Export** to keep a copy of your evidence.

> **TIP**
> - On **Integrity**, the auditor can see whether the log has been verified as unaltered.



9.4 Look at transactions: payroll, leave and expenses

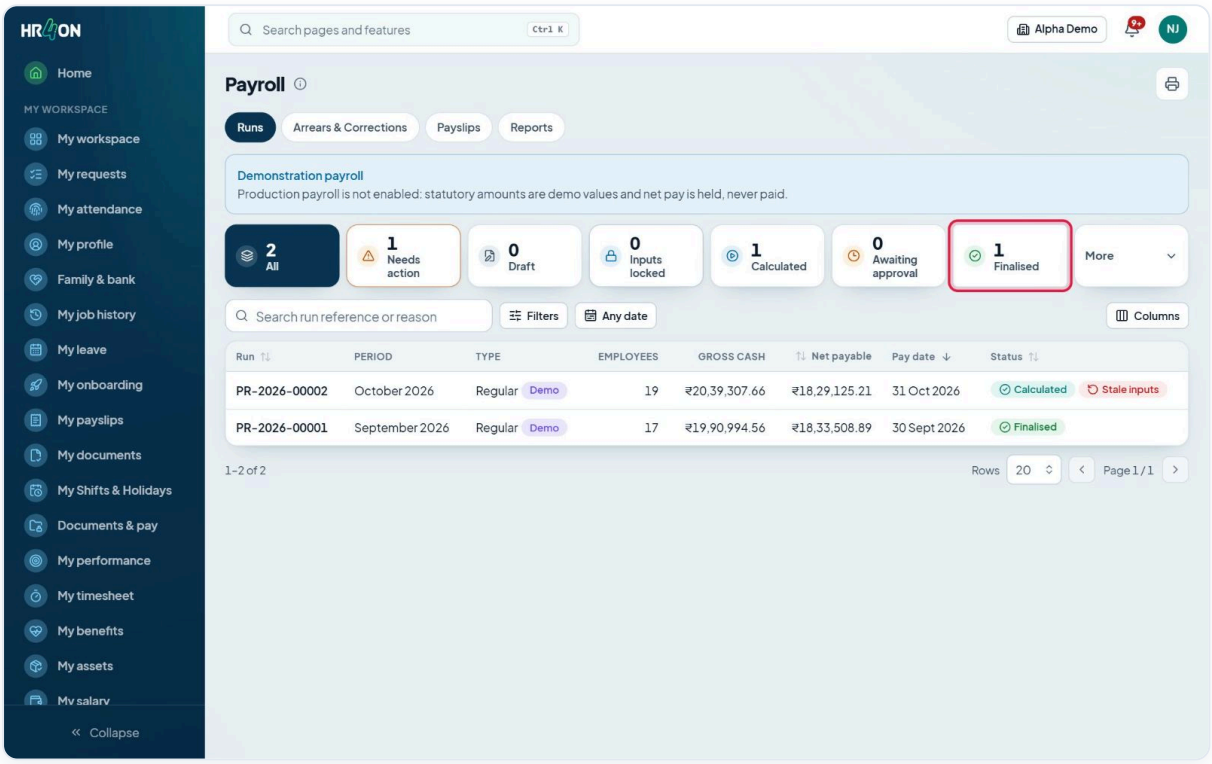
Lists of transactions show their status and let you open each one, with its approval trail.

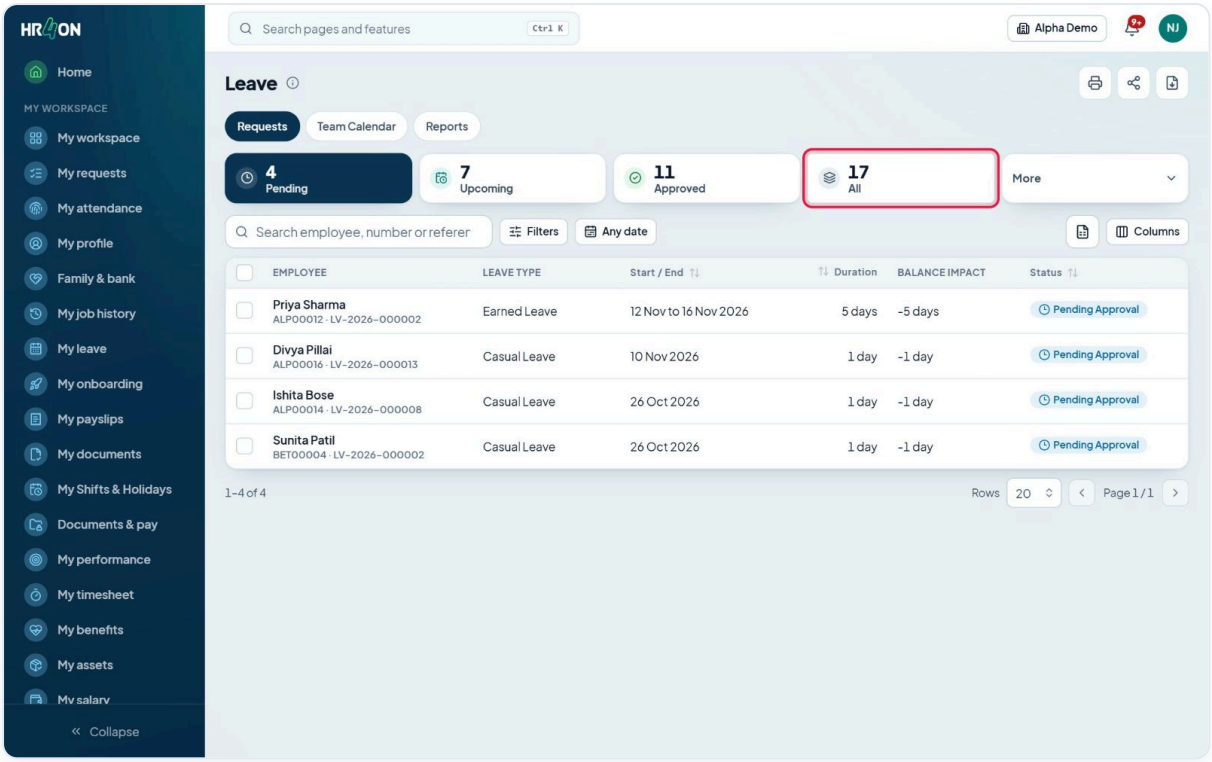
WHAT YOU SEE

- **Payroll**: runs with period, employees, gross and net, pay date and status.
- **Leave**: requests with dates, balance impact and status.
- **Expenses & Travel**: claims, approved amounts and payment status.
- **Separations**: leavers, clearance progress and settlement.

HOW TO DO IT

1. Open the module from the menu.
2. Use the count tabs and filters.
3. Open a record to see its details and history.





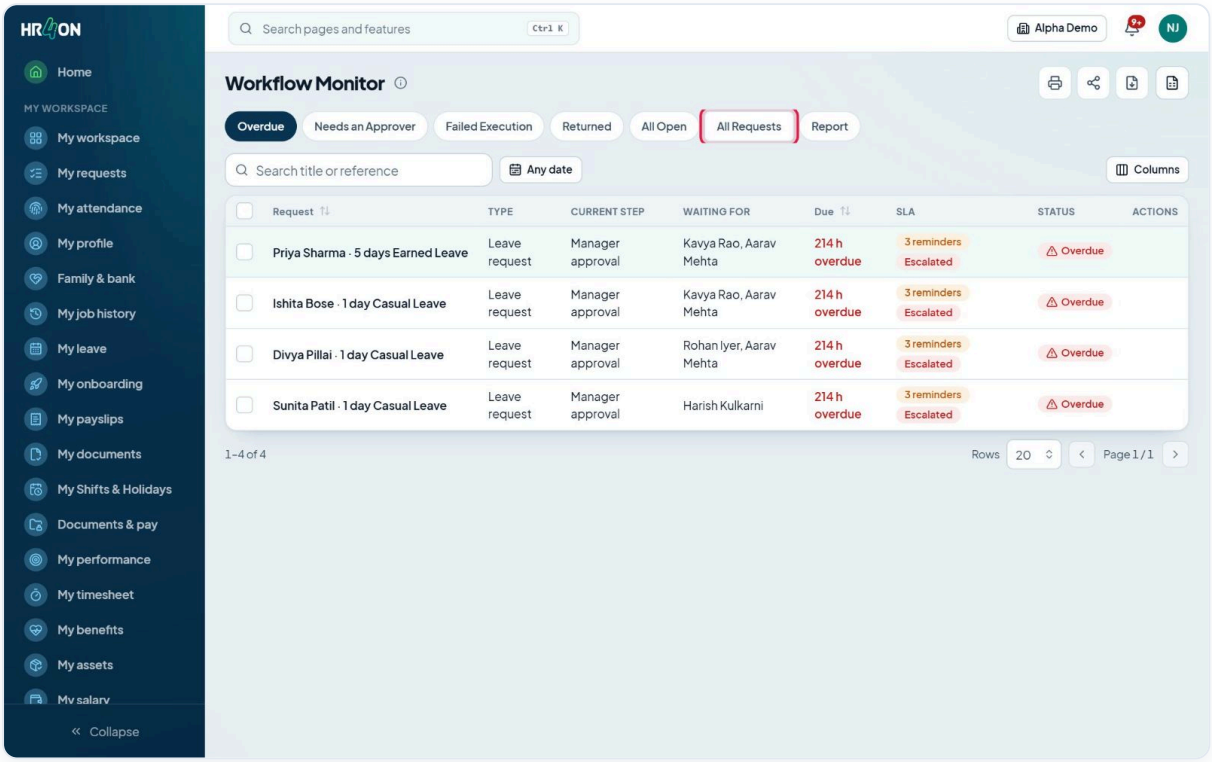
Leave requests as the auditor sees them.

9.5 Access and approvals evidence

Auditors often need to show who had access and how approvals were handled.

HOW TO DO IT

1. Open **Users & access** to see each user's roles and scopes.
2. Open **Workflow monitor** to see open, overdue and escalated approvals, and **All Requests** for the full history.
3. Run reports such as **Approval Workload** from **Reports**.



A Words used in this guide

Attrition
Leavers in a period as a percentage of average headcount.

Auditor
A person with read-only access across HR4ON to check records and history.

Date basis
The date a report uses to decide what to include, such as joined on or as of.

Escalated
A request passed to another approver because it was not decided in time.

Freshness
Whether a number is live, delayed or incomplete.

FTE
Full-time equivalent: part-time people count as a fraction.

Grain
What one row of a report represents.

Headcount
The number of employments active on a date.

High impact
A request flagged because of its amount or sensitivity.

Position
An approved role in the workforce plan, filled or vacant.

Scenario
A proposed workforce plan with headcount, FTE and cost changes.

Scope
The part of the organisation whose data you may see.

Totals only
A report that shows approved summaries without individual rows.