USER GUIDE

Manager Guide

Decide your team's requests, keep an eye on attendance and leave, and run reviews, pay planning, hiring, onboarding, changes and exits for your people.

WHO IT'S FOR

Line managers, project managers and team leads

COVERS

Approvals, My Team, delegations, performance, merit planning, recruitment, onboarding, project approvals, rosters, employment changes, exits and recognition

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

About this guide

As a manager you use HR4ON in two ways: for your own self-service (your leave, payslips and so on) and to look after your team. This guide covers the second. For your own requests, use the **Employee Guide**.

Most of your work arrives as approvals: leave, attendance corrections, timesheets, expenses and changes. The first chapters explain the approvals inbox and how to decide well. Later chapters cover your team's pages and the processes you take part in: reviews, pay planning, hiring, onboarding, project time, rosters, employment changes and exits.

What you see depends on what your company has switched on for managers. If a page in this guide is missing for you, ask your HR administrator.

What you can do in HR4ON

- Approve, reject or return your team's requests from your laptop or phone
- See who is in, who is away and what is coming up
- Hand your approvals to a colleague while you are away
- Assess your team's performance and plan merit increases
- Raise hiring requests and give interview feedback
- Welcome new joiners and complete your onboarding tasks
- Approve project time, plan rosters and propose job changes
- Start an exit for a team member and recognise good work

Before you start

- Sign in as you normally do. Your manager pages are under **My team** in the menu; other areas (Hire, Time & attendance, Grow) appear when your company gives managers access.
- Your team is everyone who reports to you directly, plus their reports (**indirect**) and anyone you manage on a project (**matrix**).
- Decisions are recorded with your name and time and cannot be undone. Read the request before you decide.

 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. The main example manager is Kavya Rao, Engineering Manager, with a team of six. A few screens use Rohan Iyer (Operations) or Aarav Mehta (CEO) where they show the feature better.

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01 Before you start

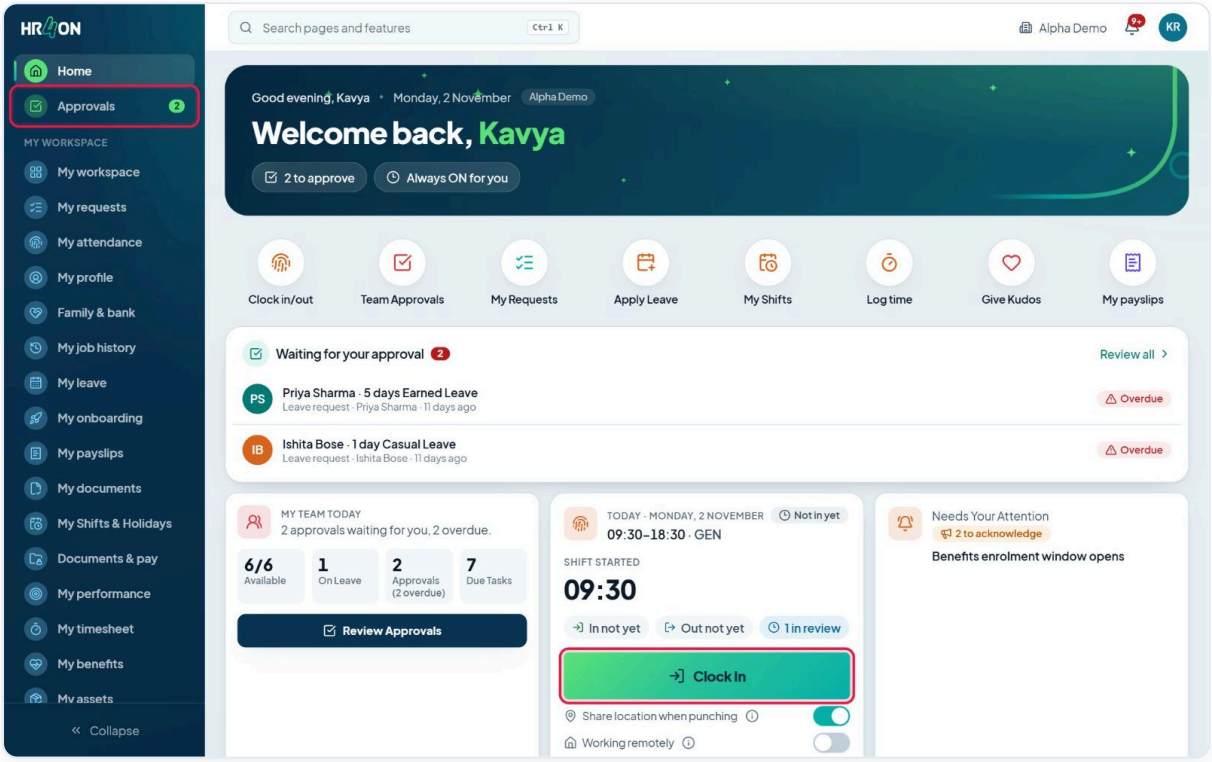
Managers are employees too. This short chapter shows where your manager tools live and where to find help with your own self-service.

1.1 Your own self-service

Clocking in, applying for leave, payslips, tax, expenses, your profile, learning and your own reviews work the same for you as for everyone else. The **Employee Guide** explains each of them step by step.

WHAT YOU SEE

- Your Home page and **My workspace** are the same as any employee's.
- Approvals and team cards appear on your Home page in addition.

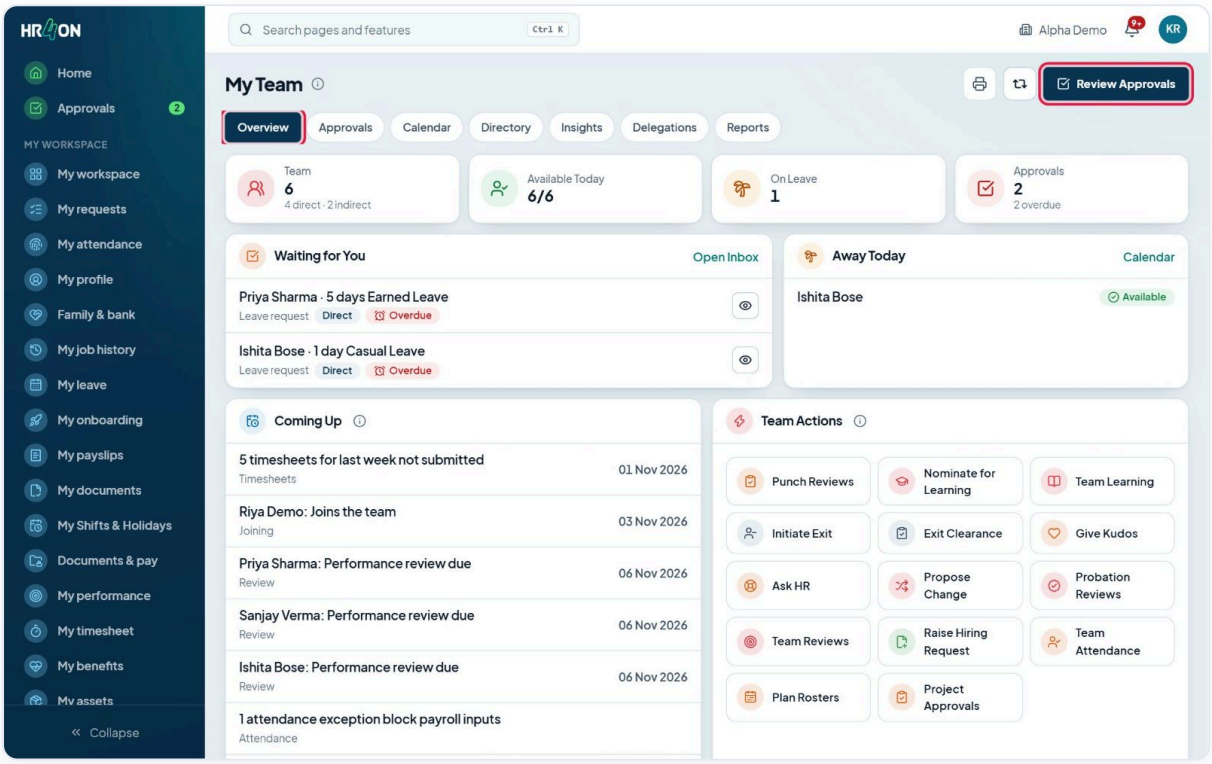


1.2 Where your manager tools are

The **My team** group in the menu holds your team pages. **My Team** opens the team overview, with tabs for each team page.

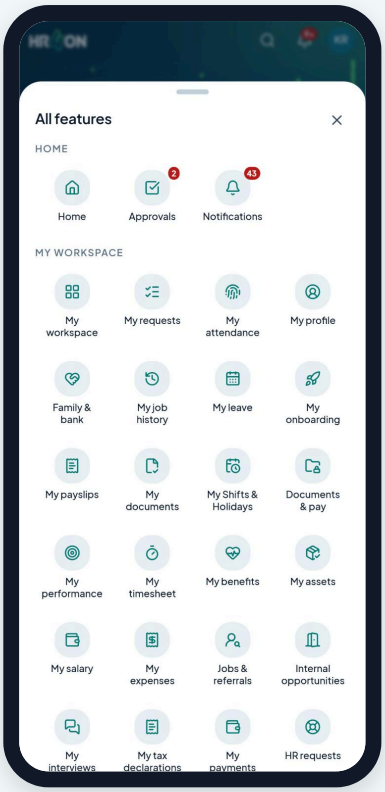
WHAT YOU SEE

- **Overview**, **Approvals**, **Calendar**, **Directory**, **Insights**, **Delegations** and **Reports** tabs across the top of each team page.
- **Approvals** under **Home** is your inbox for every request that needs your decision, from all areas.
- **Merit Planning** appears during a pay review cycle.
- Other areas you may see as a manager: **Hire** (recruitment and onboarding), **Time & attendance** (team attendance, leave, rosters, project approvals) and **Grow** (performance and learning).



ON YOUR PHONE

On a phone, tap **More** in the bottom bar: the **My team** group lists your team pages.



02 The approvals inbox

Every request that needs your decision lands in one inbox, whatever it is: leave, a correction, a timesheet, an expense, a job change. Decide in time: overdue requests are escalated to your own manager.

2.1 Your inbox

Approvals lists everything waiting for you, most urgent first.

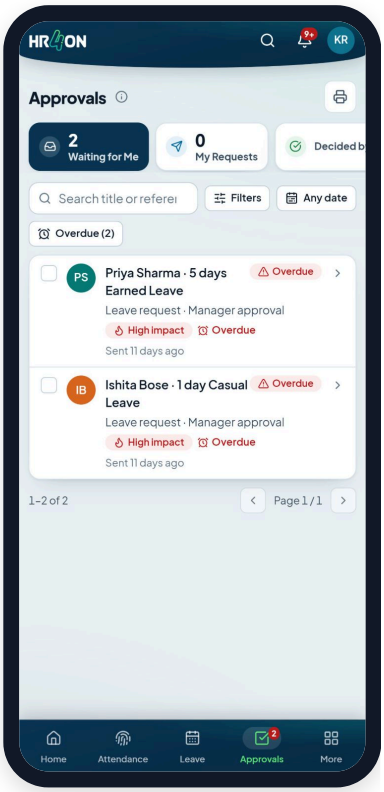
WHAT YOU SEE

- **Waiting for Me**: requests you need to decide. **My Requests**: requests you sent yourself. **Decided by Me**: your earlier decisions.
- Each row shows the request, who it is from, an **impact** badge, the current step (for example *Manager approval, Step 1 of 1*), its age and when it is due.
- **High impact** means the request deserves a closer look; hover over the badge to see why (for example *Escalated, Overdue by 2+ days*).
- **Overdue** shows only the late ones. **Filters** and **Any date** narrow the list.

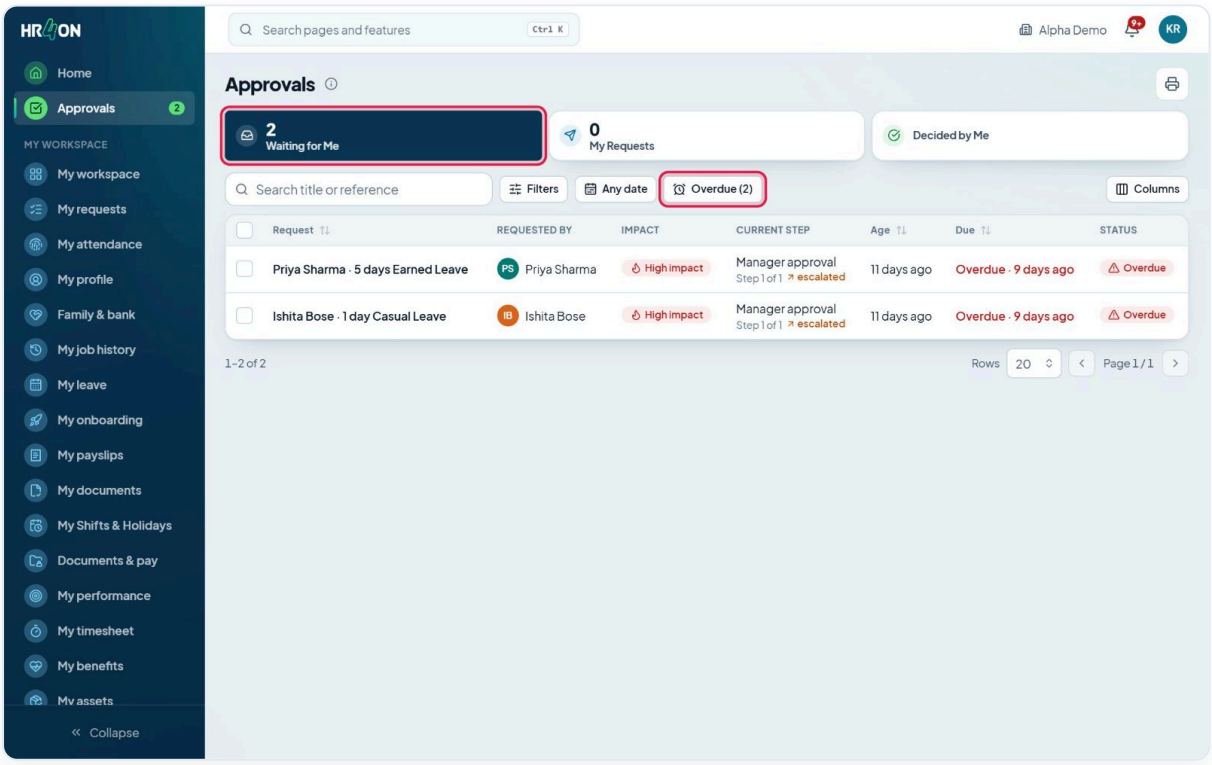
HOW TO DO IT

1. Select **Approvals** in the menu (the red number shows how many are waiting).
2. Select a request to open it.

> **GOOD TO KNOW**
> - If you do not decide in time, HR4ON sends reminders and then escalates the request to your manager, who can decide instead. Nothing is decided automatically.



On a phone the inbox is a list of cards. Tap a card to open it.



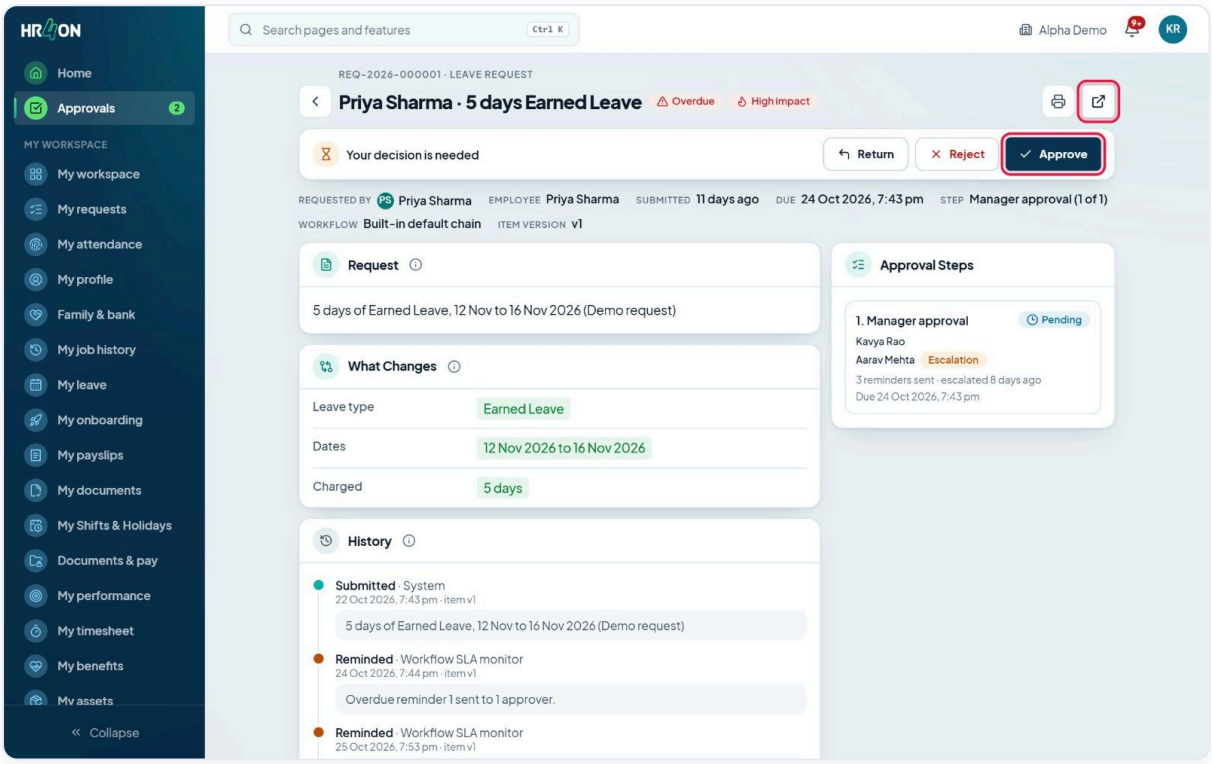
The approvals inbox on a laptop.

2.2 Review a request

The request page shows everything you need to decide in one place.

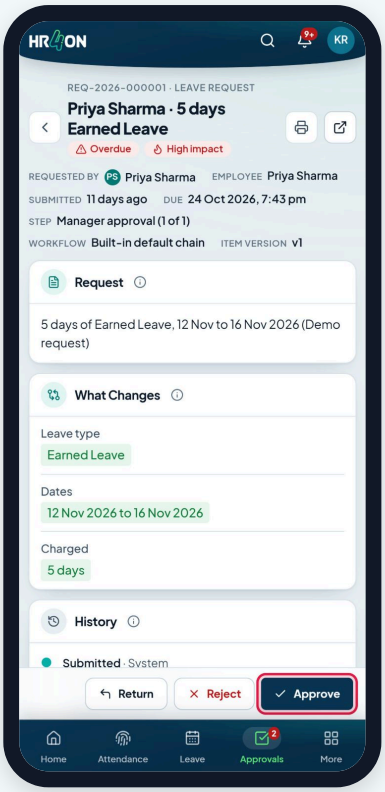
WHAT YOU SEE

- The top shows the reference and type (for example **REQ-2026-000001 · LEAVE REQUEST**), the status and the impact.
- **REQUESTED BY**, **EMPLOYEE**, **SUBMITTED**, **DUE**, **STEP** and **WORKFLOW**.
- **Request** and **What Changes**: the exact values submitted, such as the leave type, dates and days charged.
- **History**: every event, including reminders and escalations. **Approval Steps**: who decides each step.
- **Open item** opens the original record, for example the leave request with its day-by-day breakdown.



ON YOUR PHONE

On a phone the decision buttons stay within reach. Scroll for history and steps.



2.3 Approve a request

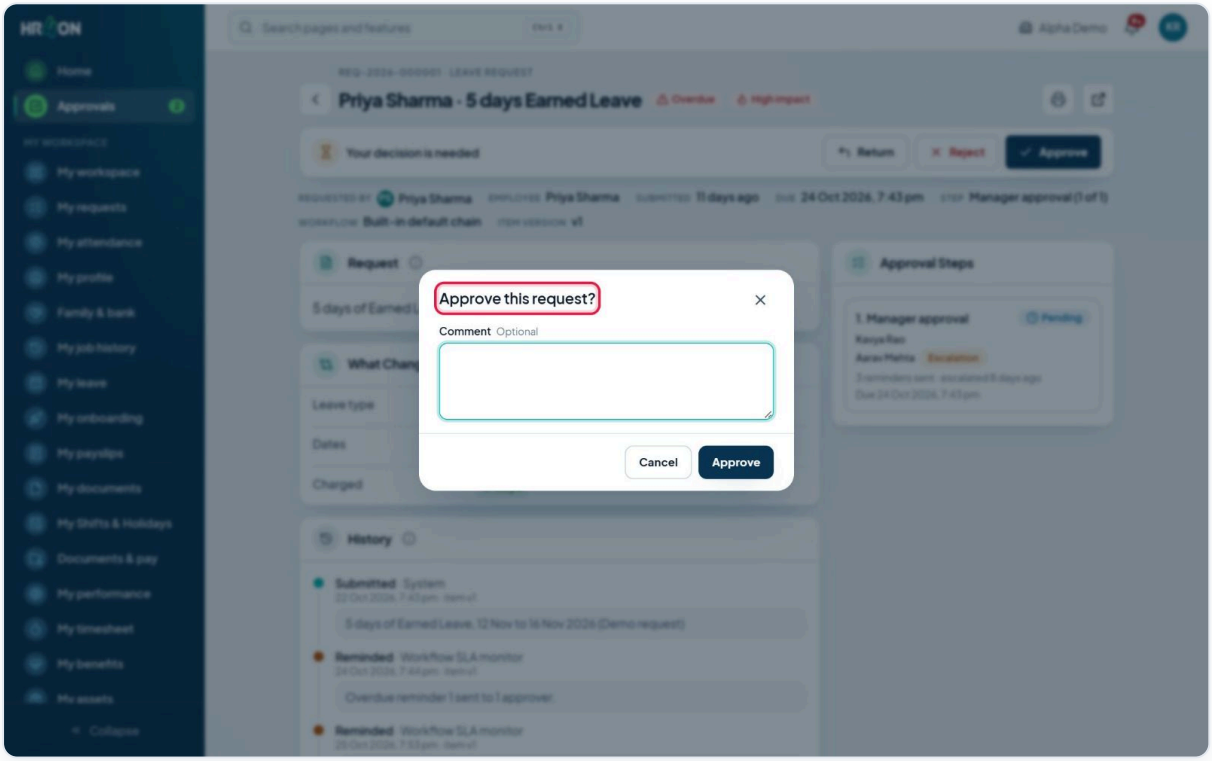
Approving moves the request to the next step or, at the last step, applies it (for example the leave is booked and the balance updated).

HOW TO DO IT

1. Open the request and check the details.
2. Select **Approve**.
3. Add an optional **Comment** for the requester.
4. Confirm with **Approve** in the dialog.

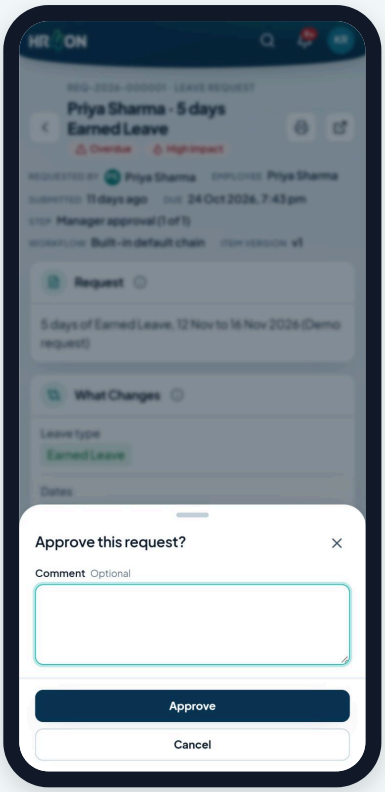
GOOD TO KNOW

- Your decision is checked against the version you saw. If the request changed while you were looking, HR4ON tells you and asks you to look again.
- The requester is notified straight away.



ON YOUR PHONE

The same confirmation on a phone.



2.4 Reject a request

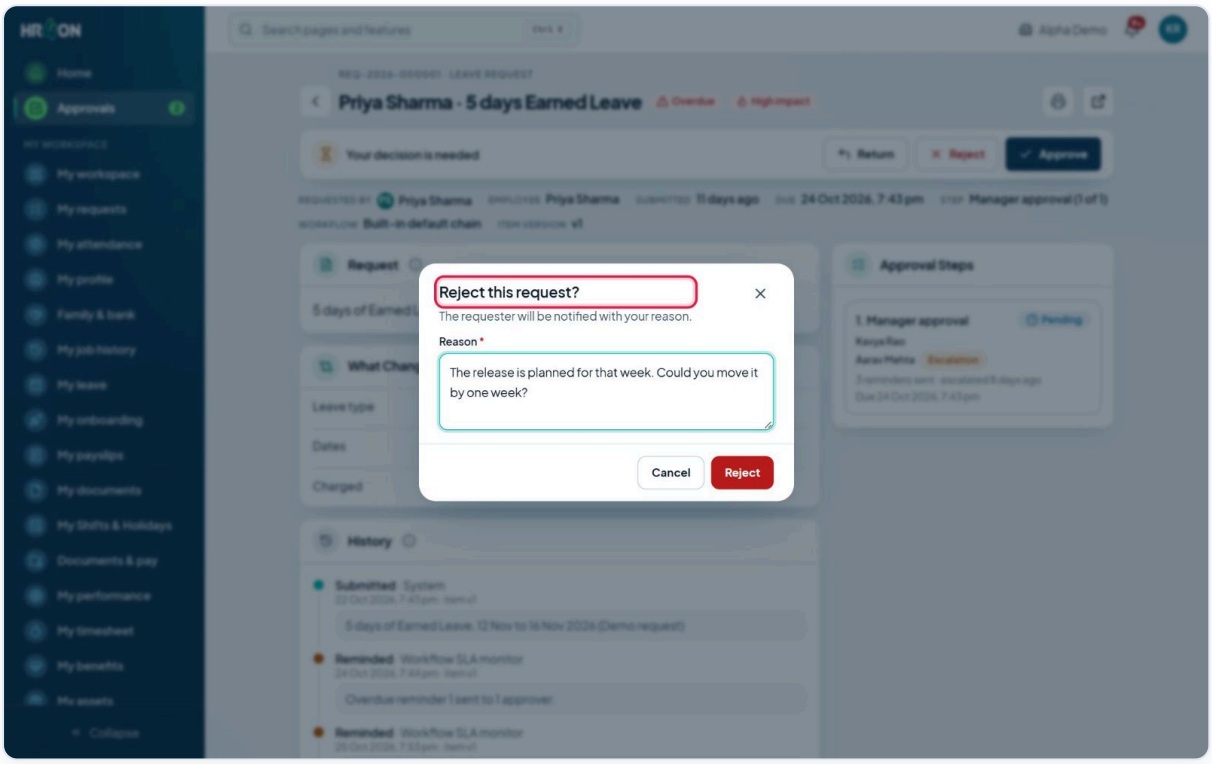
Reject when the request cannot go ahead. The requester sees your reason.

HOW TO DO IT

1. Open the request and select **Reject**.
2. Type a clear **Reason**. Your company may make it required.
3. Confirm with **Reject**.

GOOD TO KNOW

- A rejection ends the request. The employee has to send a new one if things change.



2.5 Return a request for changes

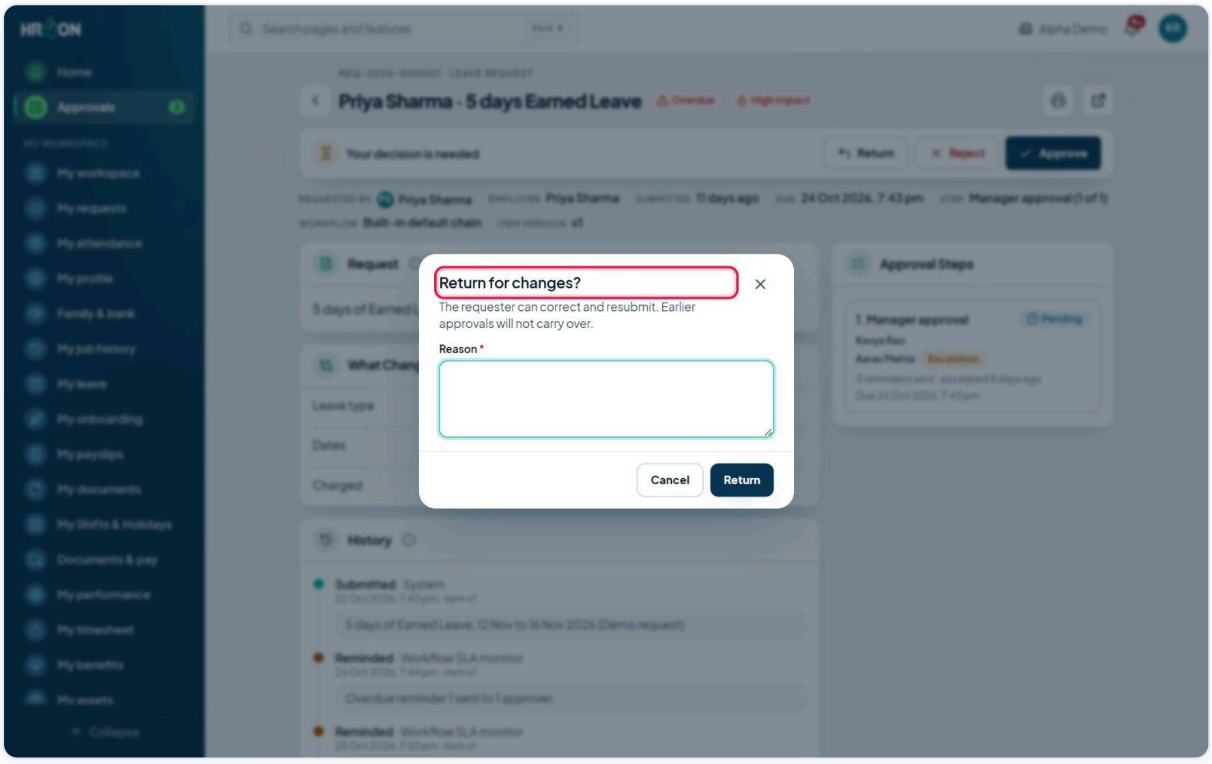
Return instead of rejecting when the request is almost right, for example the wrong dates or a missing document.

HOW TO DO IT

1. Open the request and select **Return**.
2. Explain what needs to change in **Reason**.
3. Confirm with **Return**. The employee sees it under **Need You** in their requests, corrects it and resubmits.

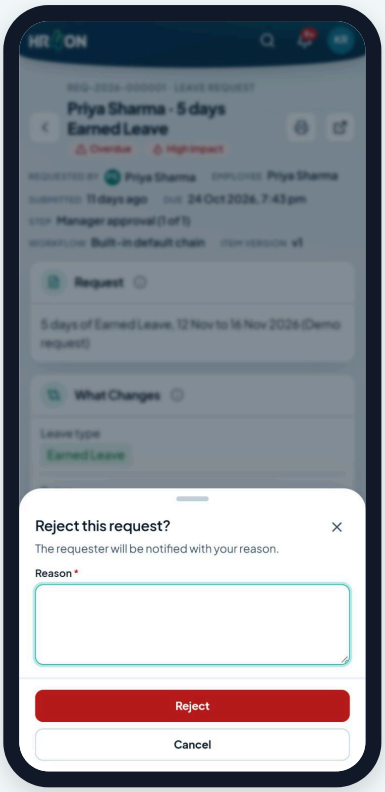
GOOD TO KNOW

- When a request comes back, earlier approvals do not carry over: it goes through the approval steps again.



ON YOUR PHONE

Reject and Return work the same on a phone: type the reason, then confirm.



2.6 Team approvals and quick decisions

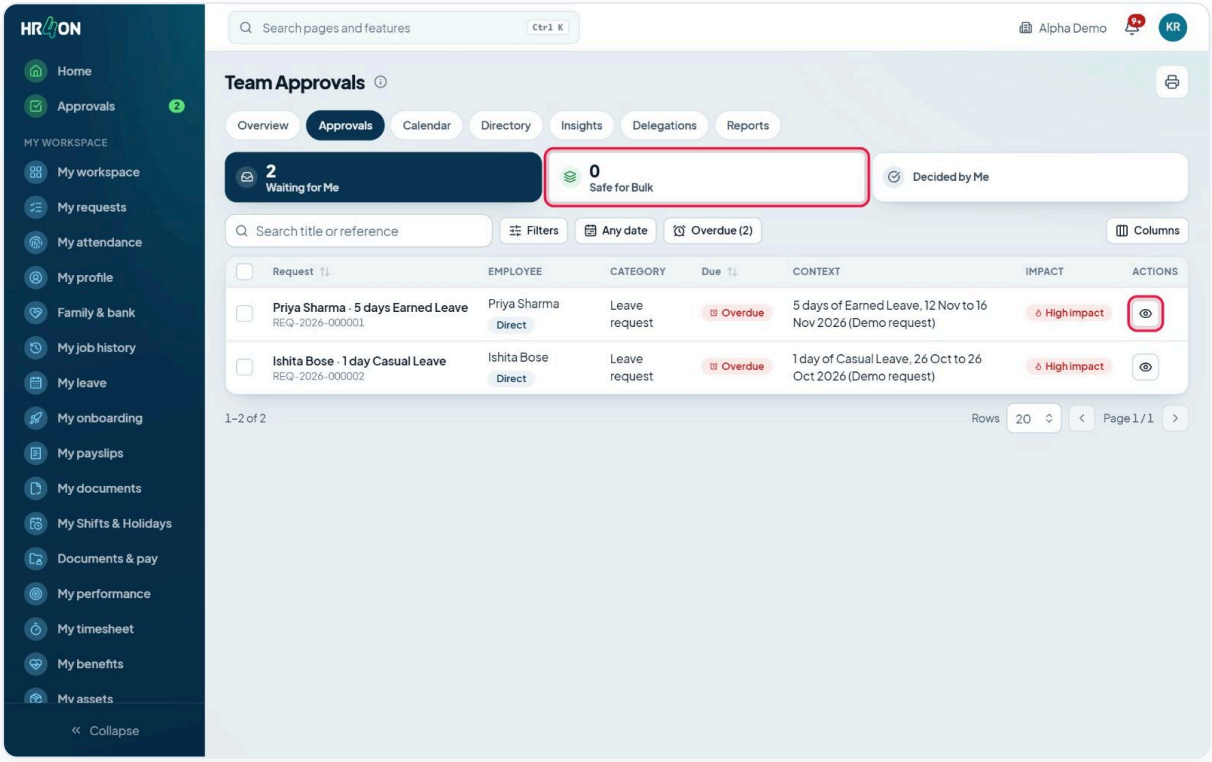
Team Approvals shows the same requests with team context, and lets you decide safe requests in bulk.

WHAT YOU SEE

- Columns: the request and reference, the **EMPLOYEE** and their relation to you (**Direct**, **Indirect**, **Matrix**), the **CATEGORY**, when it is **Due**, the **CONTEXT** and **IMPACT**.
- **Safe for Bulk**: low-risk requests you can approve or reject together. Tick them and use **Approve** or **Reject** with the number selected.
- Every other request needs a full review: the eye icon (**Review**) opens it.
- **Acting for Others** appears when you are deciding as someone's delegate; **Needs Rerouting** when a requester no longer reports to you (HR re-routes it).

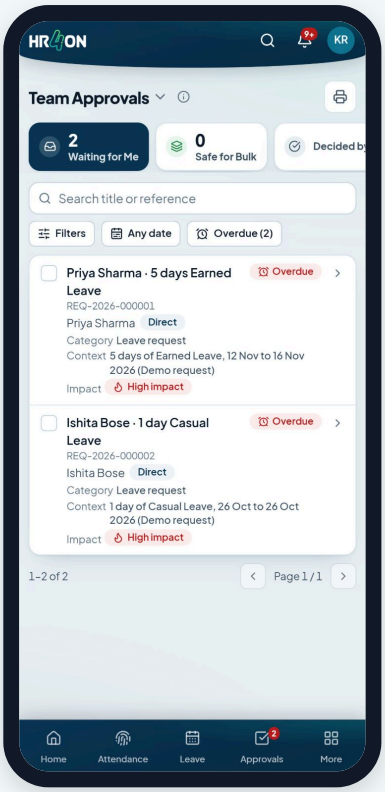
GOOD TO KNOW

- In bulk decisions each request is checked separately; anything that changed is reported back to you, not decided.



ON YOUR PHONE

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



03 Approvals by type

The decision is the same for every type of request, but what you check differs. This chapter covers what to look at for each one and where else the request appears.

3.1 Leave

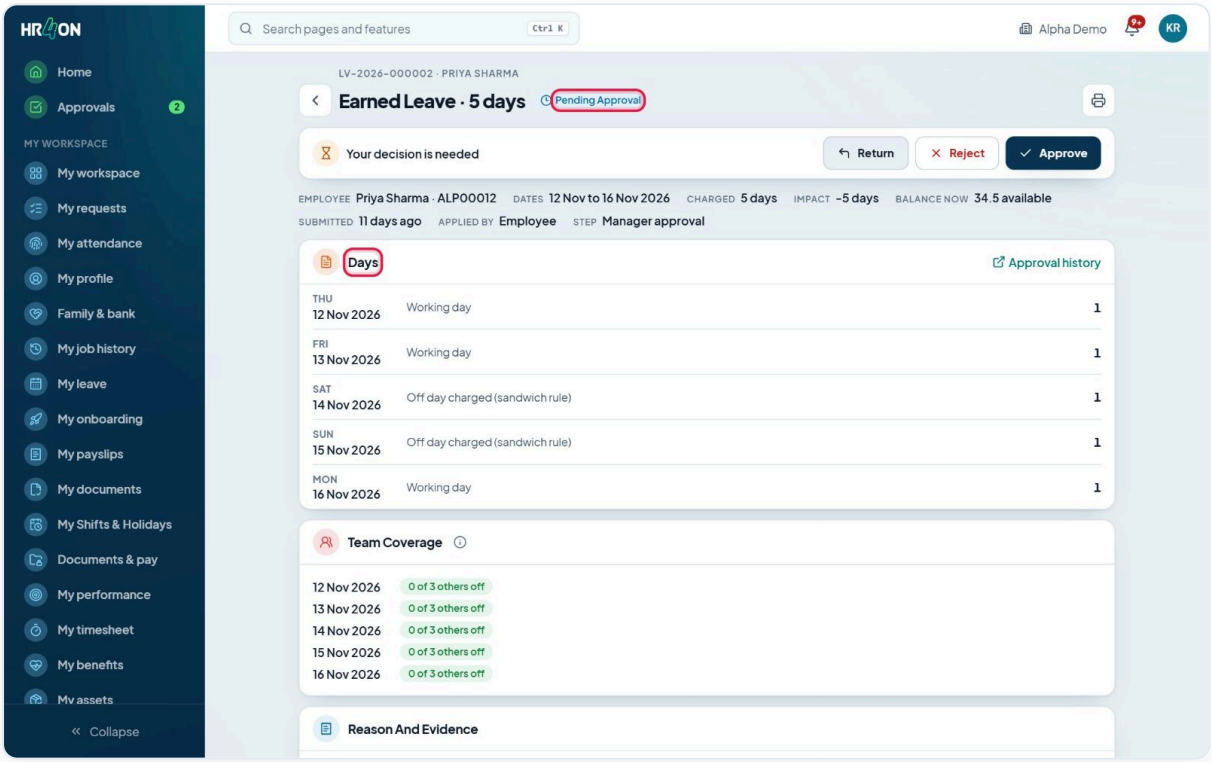
For leave, check the dates against your team's plans and the balance impact.

WHAT YOU SEE

- Select **Open item** to see the leave request: each day and how it was charged (including weekly offs charged under the sandwich rule), the reason and any certificate.
- Check the team calendar (chapter 4) to see who else is away on those dates.
- Approved leave appears on the team calendar and in the employee's balance.

TIP

- **Time & attendance** › **Leave** lists every leave request in your team with filters for **Pending**, **Upcoming** and **Approved**.

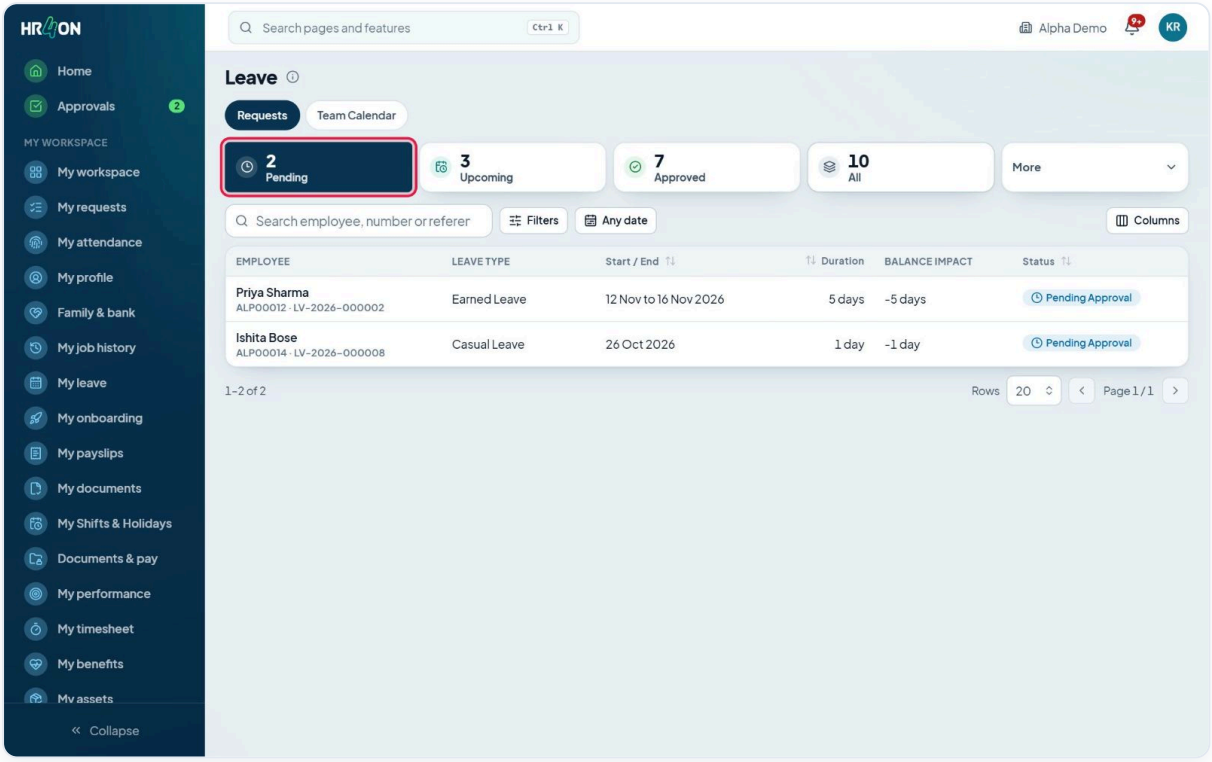


3.2 All team leave requests

Time & attendance › **Leave** lists every leave request in your team, so you can see what is pending, coming up and already approved in one place.

WHAT YOU SEE

- Filters: **Pending**, **Upcoming**, **Approved** and **All**.
- Each row shows the employee, leave type, dates, duration, balance impact and status.
- **Team Calendar** at the top shows the same leave on a calendar.

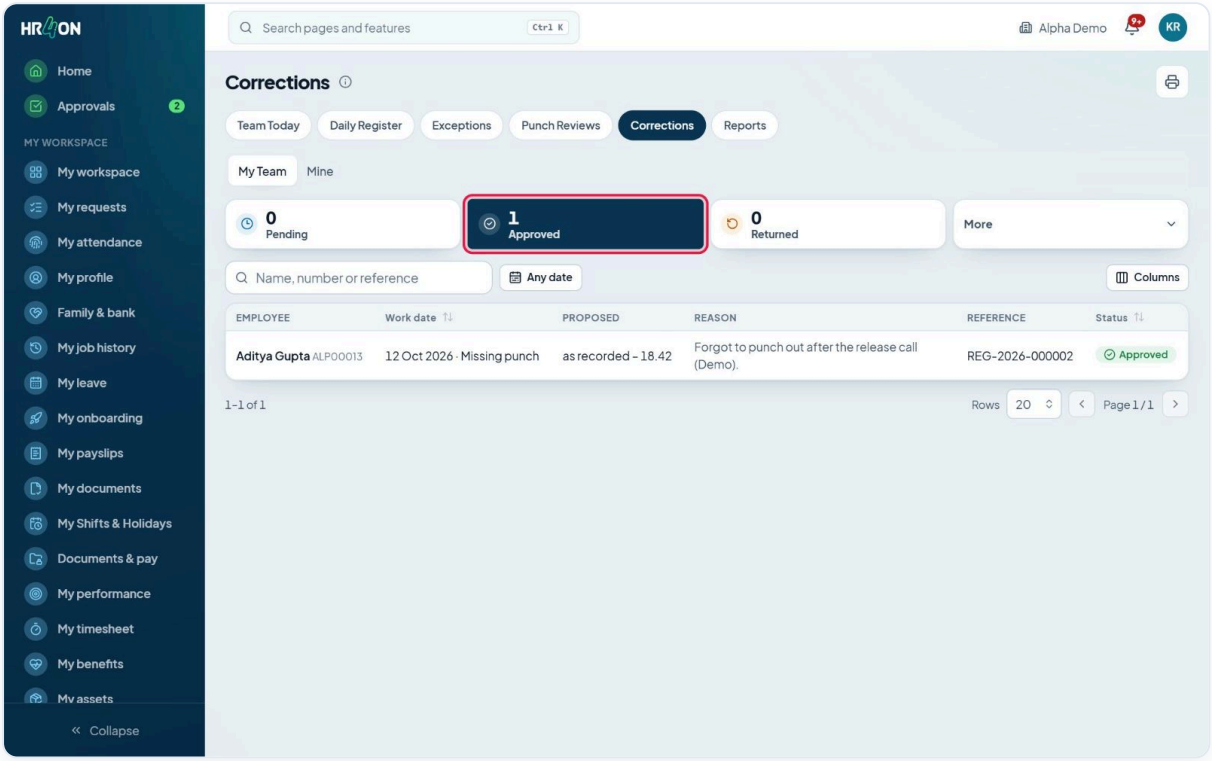


3.3 Attendance corrections

When someone forgets to punch or a punch is wrong, they ask for a correction. You decide whether it is right.

WHAT YOU SEE

- **Attendance** › **Corrections** lists requests from **My Team** (switch to **Mine** for your own), by status: **Pending**, **Approved**, **Returned**.
- Columns: the employee, **Work date** and kind of correction, the **PROPOSED** times, the **REASON**, the **REFERENCE** and the status.
- Each request shows the day, the punches recorded, the corrected times, the reason and any evidence.
- Approved corrections update the day and the payroll inputs.



3.4 Remote punches and attendance exceptions

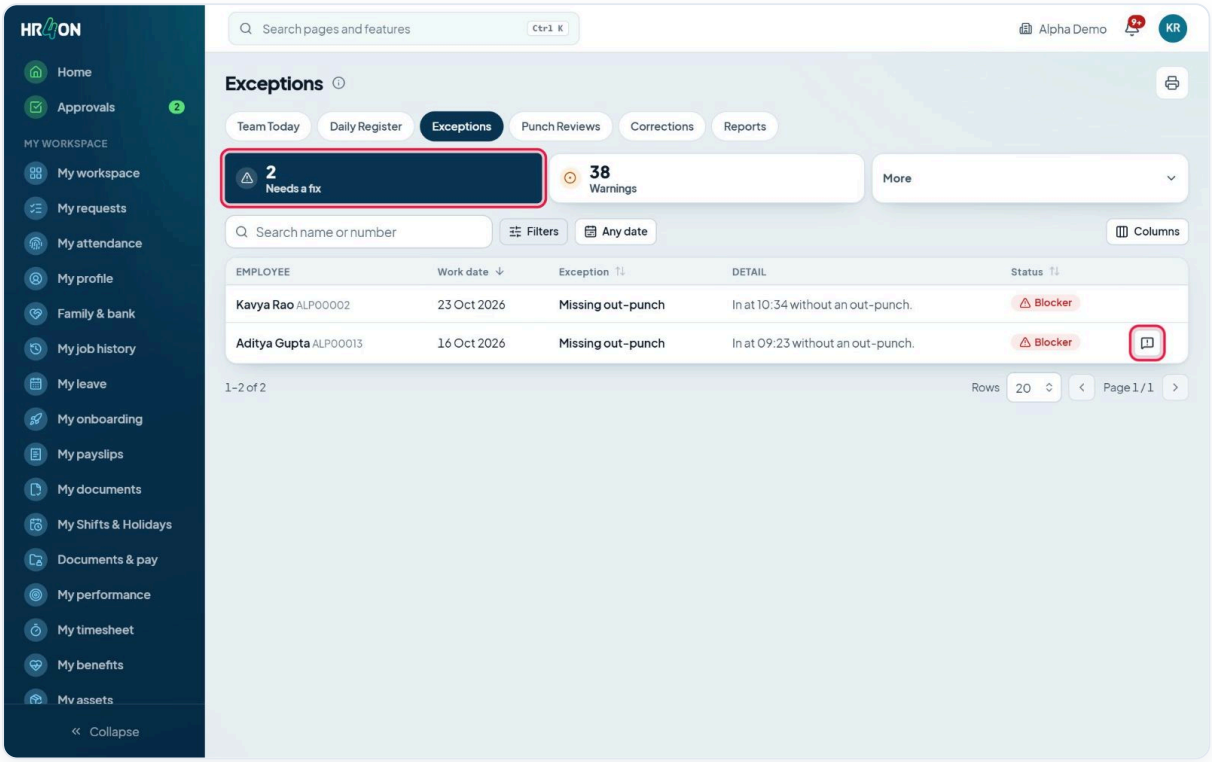
Two more attendance lists need you from time to time.

WHAT YOU SEE

- **Punch Reviews**: punches made remotely or outside the office. Accept them, or reject them if the person was not working.
- **Exceptions**: days that need a fix, such as a **Missing out-punch**. **Blocker** exceptions stop the day being paid until they are fixed. You can **Request evidence** from the employee.

GOOD TO KNOW

- Open blocker exceptions hold up payroll inputs for the month. Clear them before the attendance period closes.



3.5 Timesheets (project approvals)

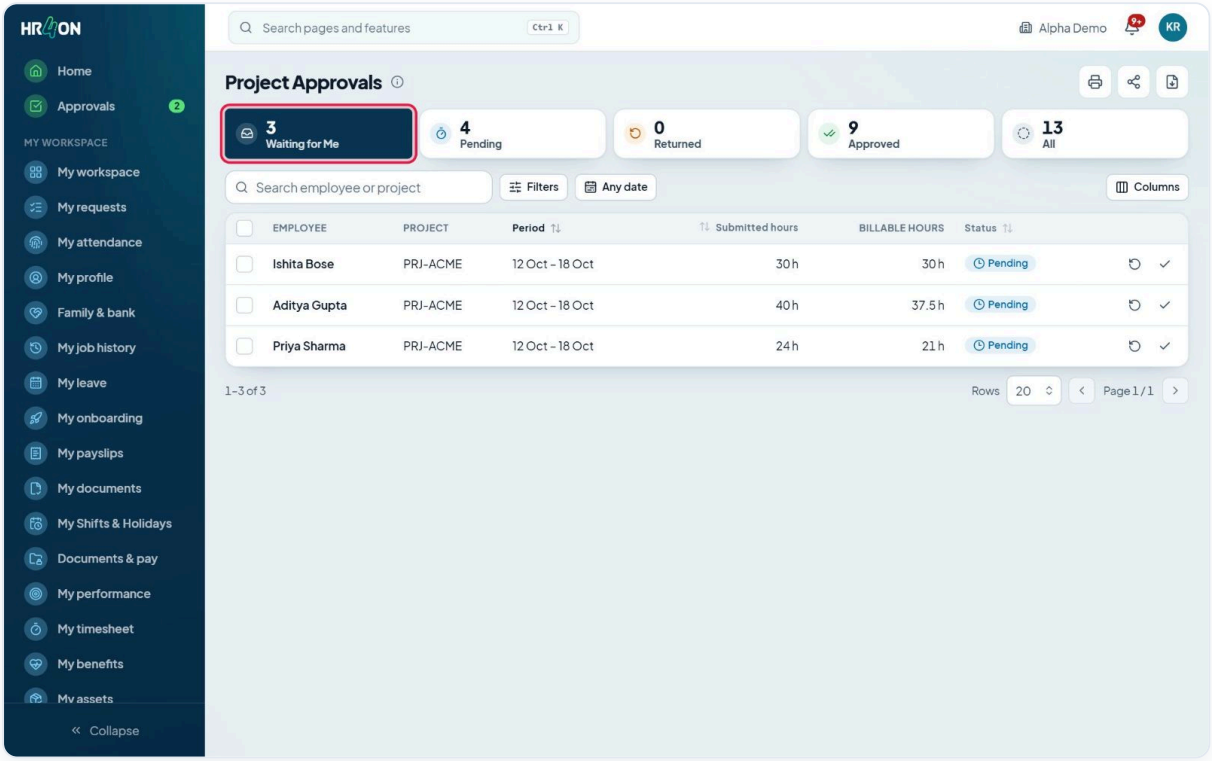
If you manage a project or are a line manager for project time, you approve the hours logged against it.

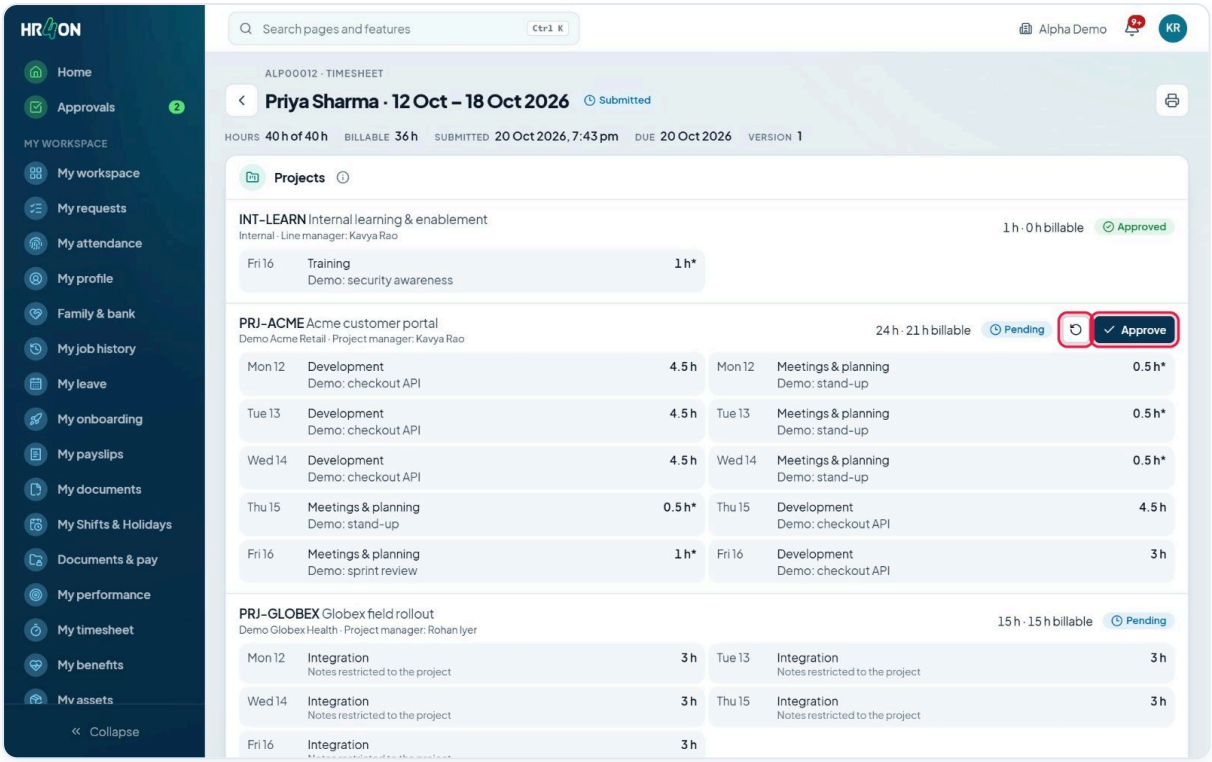
WHAT YOU SEE

- **Project Approvals** lists timesheets **Waiting for Me**, **Pending**, **Returned**, **Approved** and **All**.
- Each row shows the employee, project, week, submitted hours and billable hours.
- Open a timesheet to see each day's entries per project. You approve only your project's part; other parts go to their own managers.

HOW TO DO IT

1. Open **Project Approvals**.
2. Select the employee to open the timesheet.
3. Check the hours and notes, then select **Approve** or **Return** (with a reason) for your project.





One timesheet: each project is approved separately.

3.6 Expenses and travel

Expense claims, travel requests and cash advances from your team come to your inbox.

WHAT YOU SEE

- Check that each line is a genuine business cost, has a receipt where the policy needs one and is within the limits.
- You can approve the claim, return it to fix a line, or reject it.
- After you approve, finance checks the claim and it is paid to the employee's bank.

> **TIP**
> - The team member page (chapter 4) shows each person's expense claims this year and anything waiting for you.

3.7 Other requests

The same inbox carries every other request that needs a manager: loans and salary advances, employment changes (transfers, promotions, manager changes), resignations, hiring requests, development plans and more.

WHAT YOU SEE

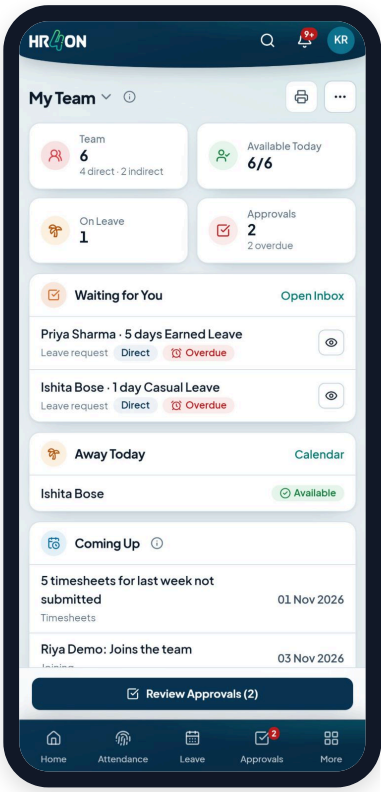
- The request page always shows **What Changes** with the exact values, so you know what you are approving.
- Some requests have several steps, for example you, then HR, then finance. **Approval Steps** shows where it is.

04 My Team

Your team pages show who is in, who is away, what is coming up and how the team is doing, with a page for each person.

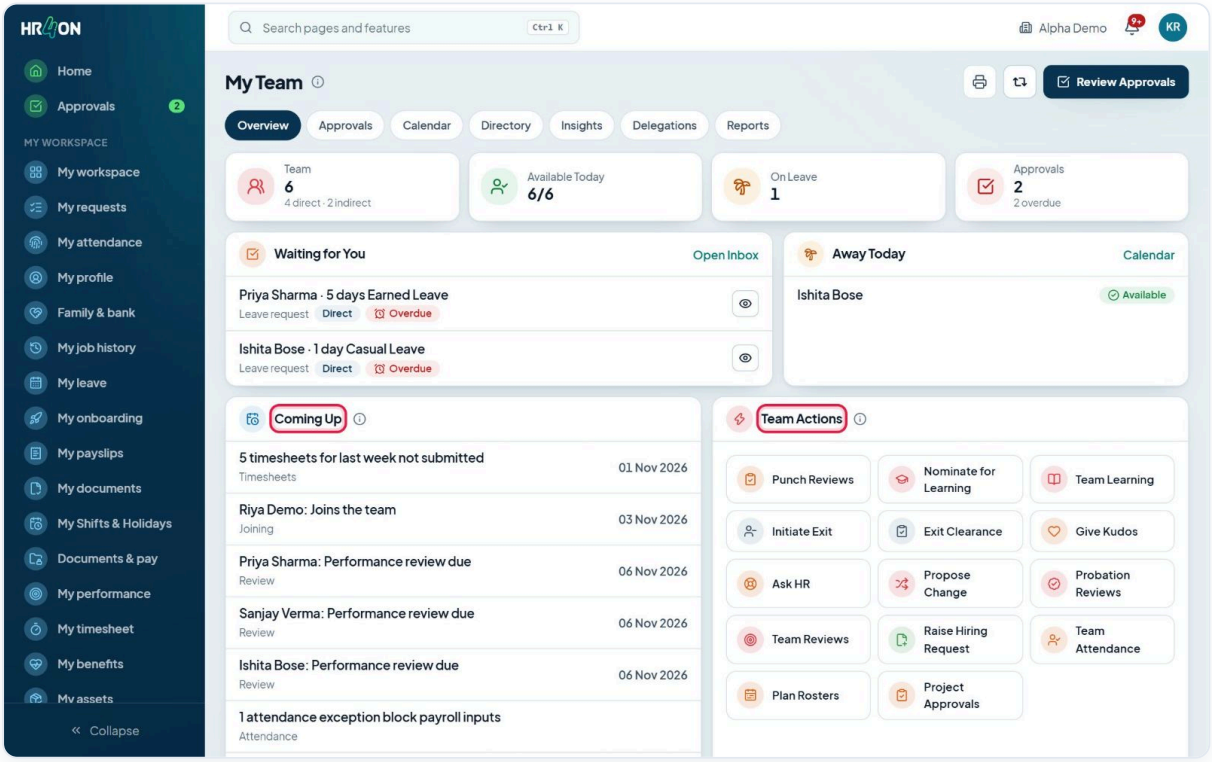
4.1 Team overview

My Team gives you the day at a glance.



WHAT YOU SEE

- Tiles: **Team** size (direct, indirect, matrix), **Available Today**, **On Leave** and **Approvals** waiting.
- **Waiting for You**: your oldest approvals, with **Open Inbox**.
- **Away Today**: who is on leave or off.
- **Coming Up**: joiners, reviews due, timesheets not submitted, attendance exceptions and overdue mandatory courses.
- **Team Actions**: shortcuts such as **Punch Reviews**, **Nominate for Learning**, **Initiate Exit**, **Give Kudos**, **Propose Change**, **Probation Reviews**, **Raise Hiring Request**, **Plan Rosters** and **Project Approvals**.



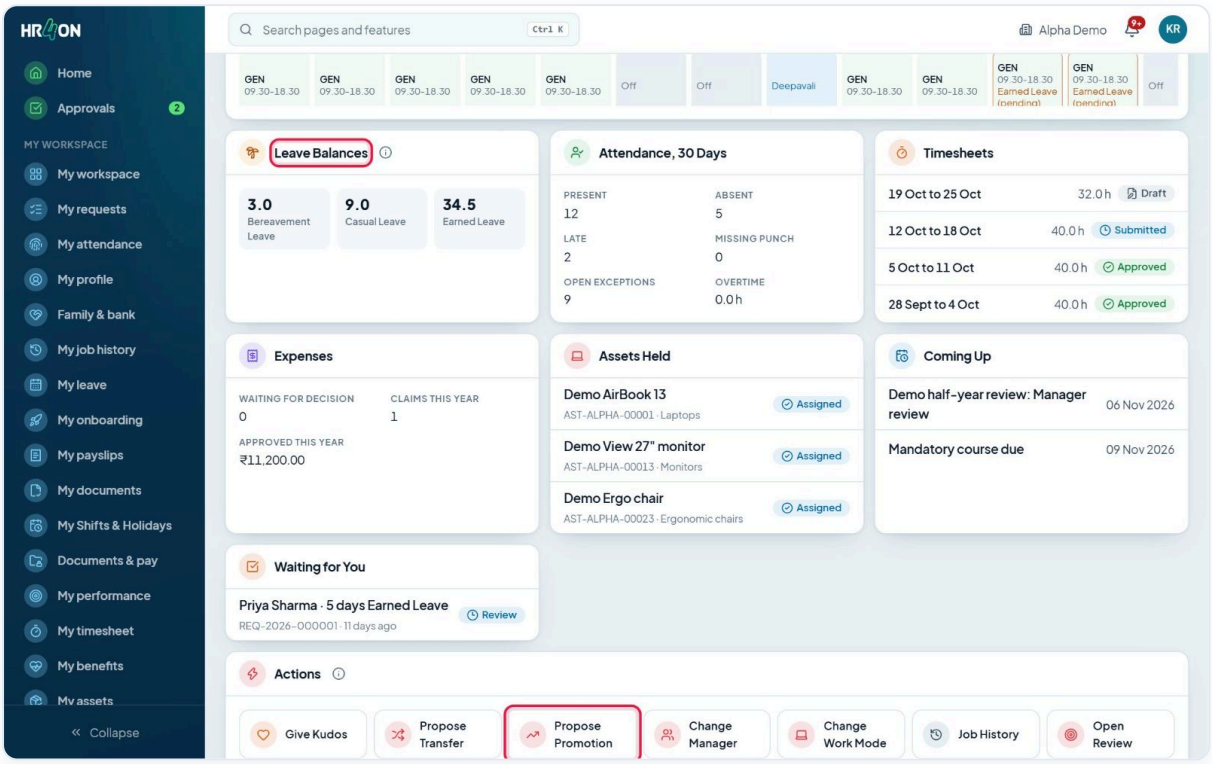
My Team on a laptop.

4.2 A team member's page

Select anyone in your team to see their whole picture on one page.

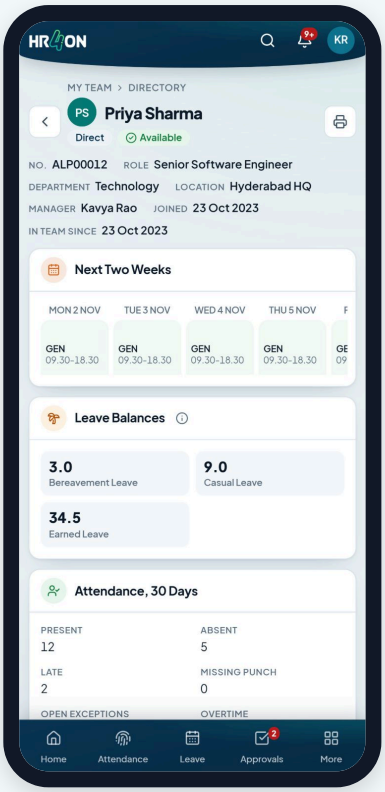
WHAT YOU SEE

- Their role, department, location, manager and when they joined your team.
- **Next Two Weeks**: shifts, holidays and leave (pending leave is marked).
- **Leave Balances**, **Attendance, 30 Days**, **Timesheets**, **Expenses** and **Assets Held**.
- **Coming Up**: reviews and courses due, and any approvals waiting.
- Actions: **Give Kudos**, **Propose Transfer**, **Propose Promotion**, **Change Manager**, **Change Work Mode**, **Review Probation**, **Job History**, **Development Plan**, **Open Profile** and **Attendance Calendar**.



ON YOUR PHONE

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

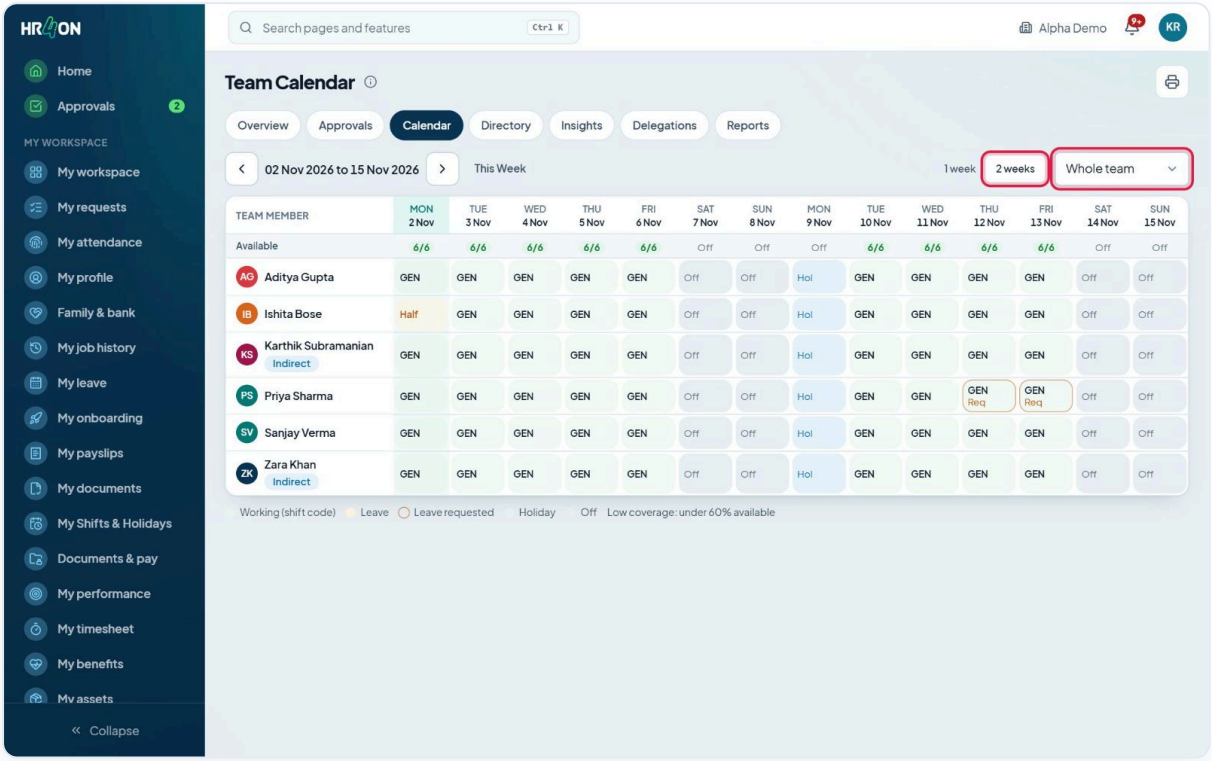


4.3 Team calendar

Calendar shows your team's availability day by day, so you can plan cover and judge leave requests.

WHAT YOU SEE

- Choose **1 week** or **2 weeks** and move with the arrows; **This Week** jumps back to today.
- Use the drop-down to show the **Whole team** or just **Direct reports**, **Indirect reports** or **Matrix**.
- The **Available** row shows how many are in each day. Each cell shows the shift code, **Off**, **Hol** (holiday), leave such as **Half**, or **Req** (outlined) for leave waiting for approval. Days under 60% available are flagged as low coverage.
- Select a person to open their page, or a leave cell to open the leave request.

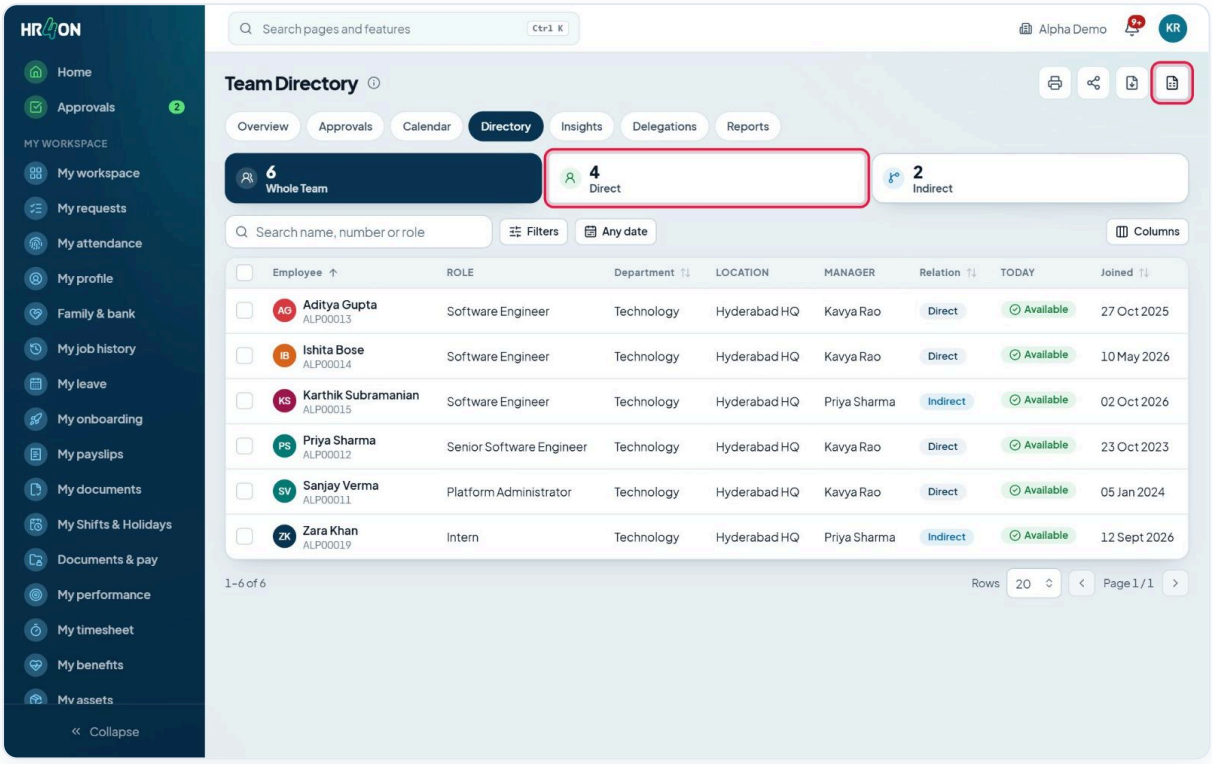


4.4 Team directory

Directory lists everyone in your team with their role, department, location, manager, relation to you, today's status and joining date.

HOW TO DO IT

1. Use **Whole Team**, **Direct** and **Indirect** to filter.
2. Select **Export** or **Download PDF** for a copy.
3. Select a name to open their page.

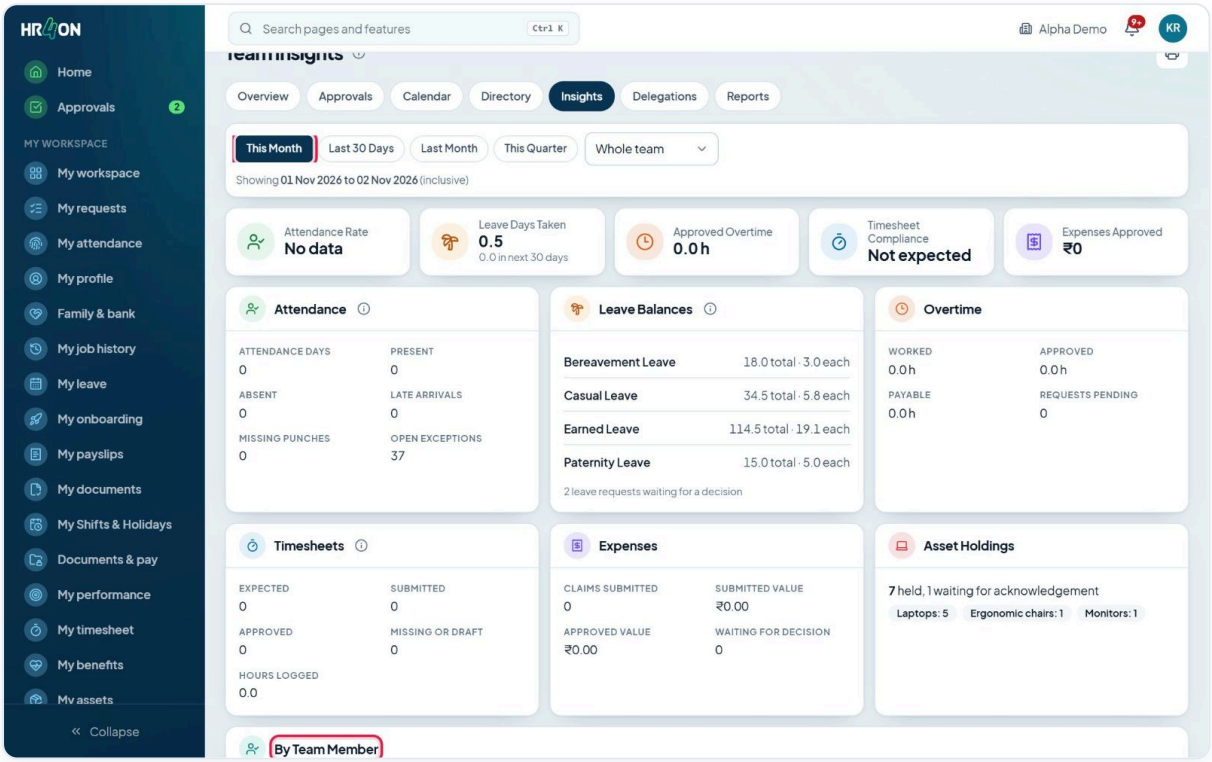


4.5 Team insights

Insights summarises how the team is doing over a period.

WHAT YOU SEE

- Pick the period: **This Month**, **Last 30 Days**, **Last Month** or **This Quarter**, and which part of the team.
- Headline figures: attendance rate, leave days taken, approved overtime, timesheet compliance and expenses approved.
- Sections for attendance, leave balances, overtime, timesheets, expenses and assets held.
- **By Team Member** shows the same figures per person.

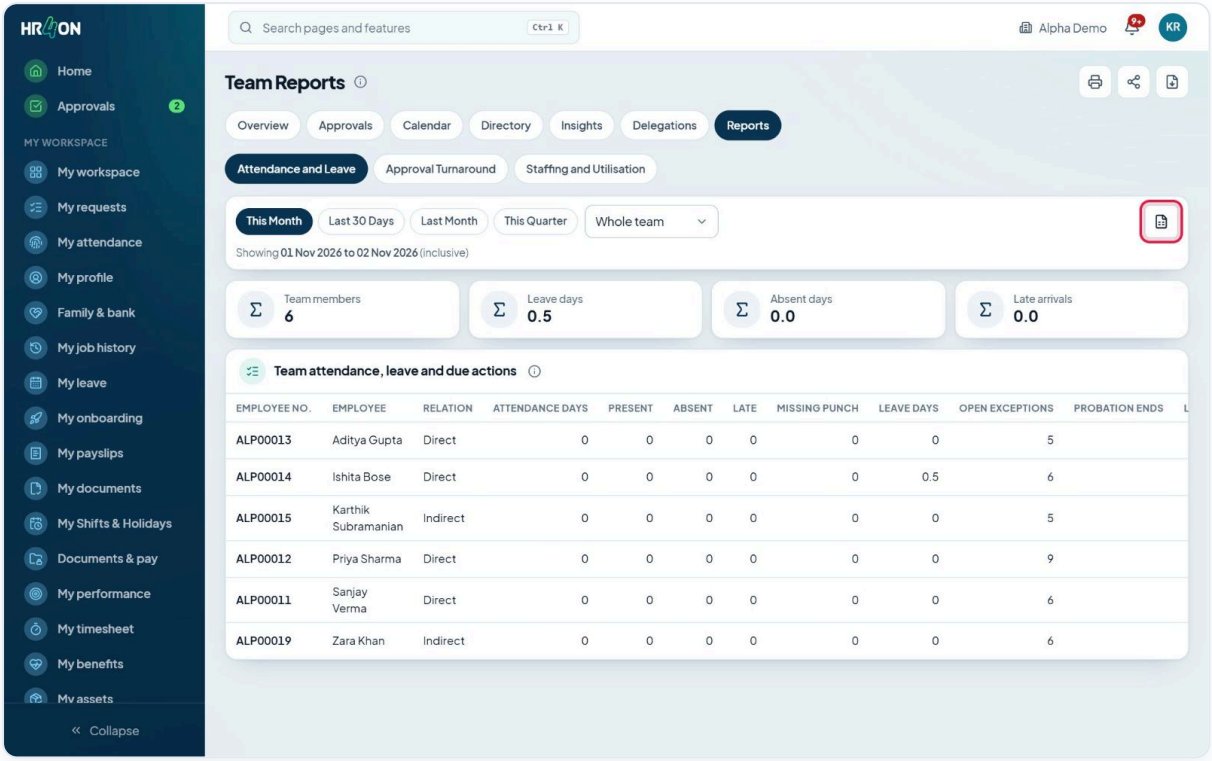


4.6 Team reports

Reports gives ready-made tables you can download: **Attendance and Leave**, **Approval Turnaround** and **Staffing and Utilisation**.

HOW TO DO IT

1. Choose the report tab and period.
2. Select **Download CSV** for a spreadsheet, or **Download PDF**.

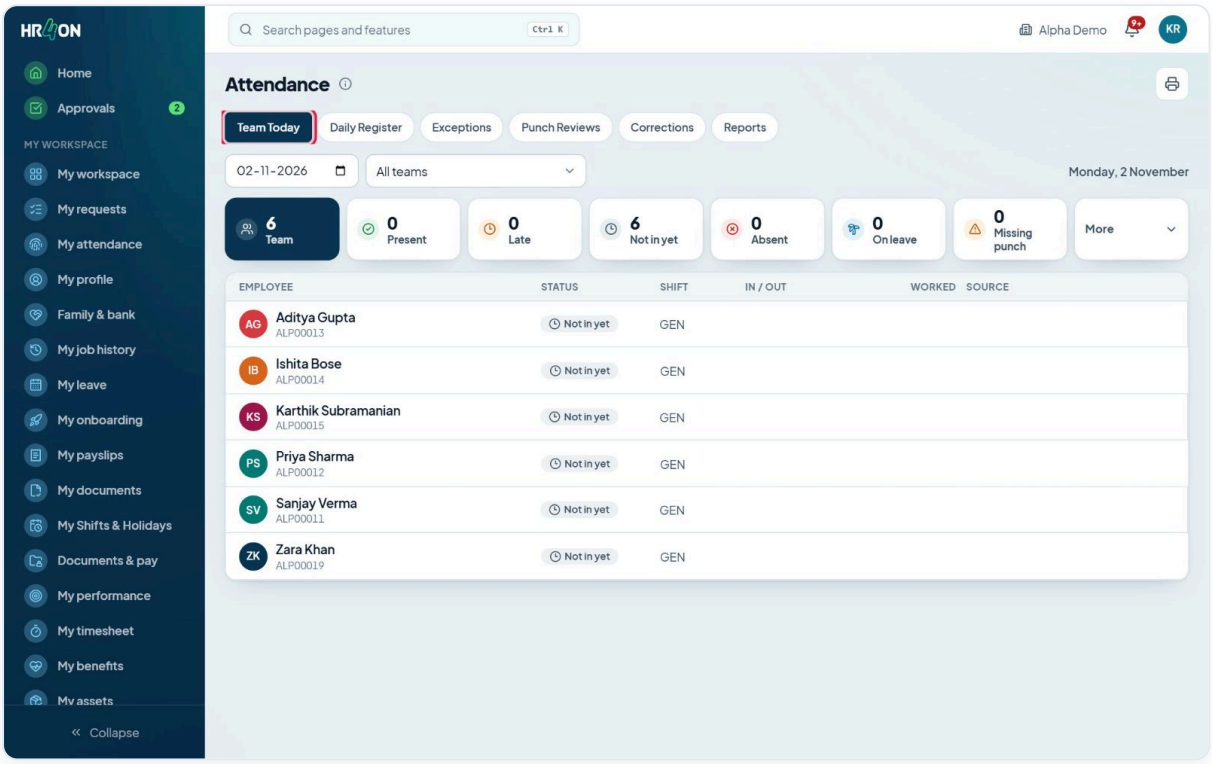


4.7 Team attendance today

Attendance › **Team Today** shows each person's status today: present, late, not in yet, absent, on leave or missing punch.

WHAT YOU SEE

- Select a status tile to filter.
- Select a person to open the day, with punches and any exceptions.
- The other tabs: **Daily Register**, **Exceptions**, **Punch Reviews**, **Corrections** and **Reports**.



05 Delegations

Going on leave? Delegate your approvals so your team is not kept waiting.

5.1 Your delegations

Delegations lists the delegations you set up and the ones others gave you.

WHAT YOU SEE

- **Active**: running now. **Scheduled**: starting later. **Delegated to Me**: approvals others have handed to you.

5.2 Set up a delegation

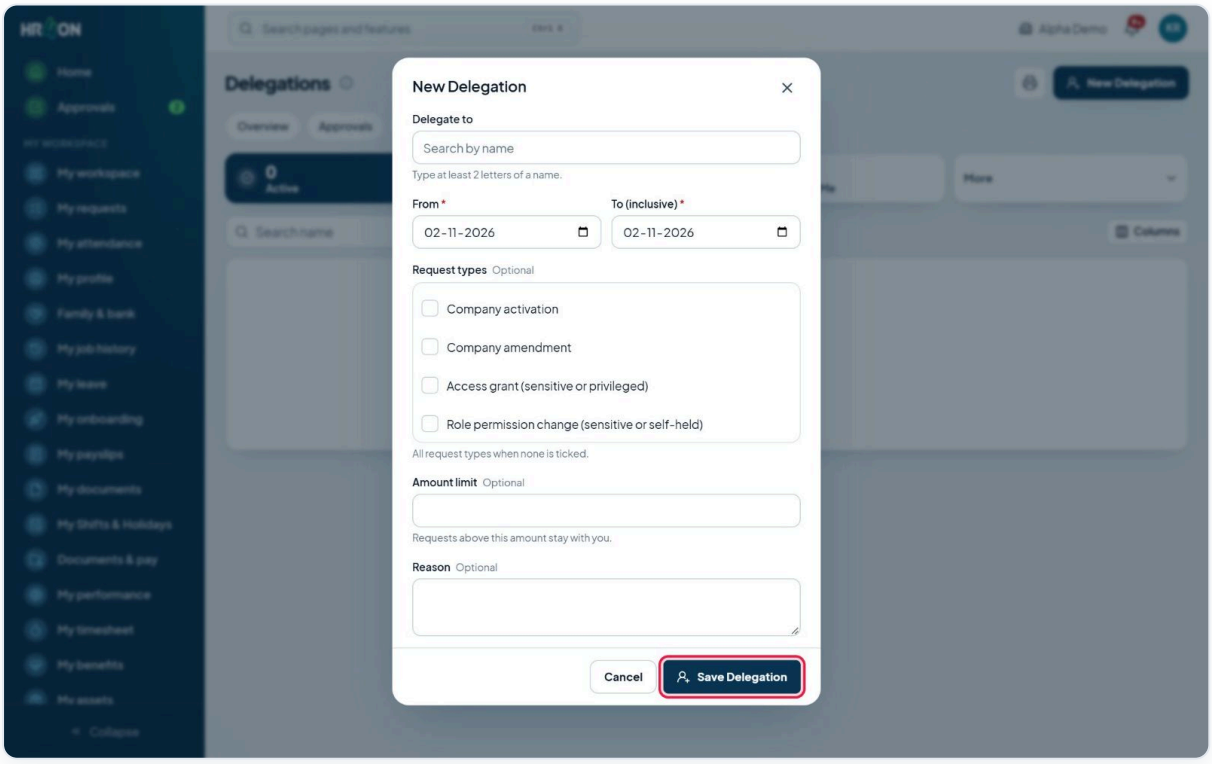
Choose who approves for you, for which dates and which kinds of request.

HOW TO DO IT

1. Open **Delegations** and select **New Delegation**.
2. Pick the person in **Delegate to**.
3. Set **From** and **To (inclusive)**.
4. Tick the **Request types** to delegate, or leave them all unticked to delegate every type.
5. Set an optional **Amount limit**: requests above it stay with you.
6. Add a **Reason**, for example *Annual leave*, and select **Save Delegation**.

GOOD TO KNOW

- Your delegate decides in your name and the history shows both of you.
- You can still decide yourself during the delegation.
- A delegate cannot approve their own requests.



06 Team performance

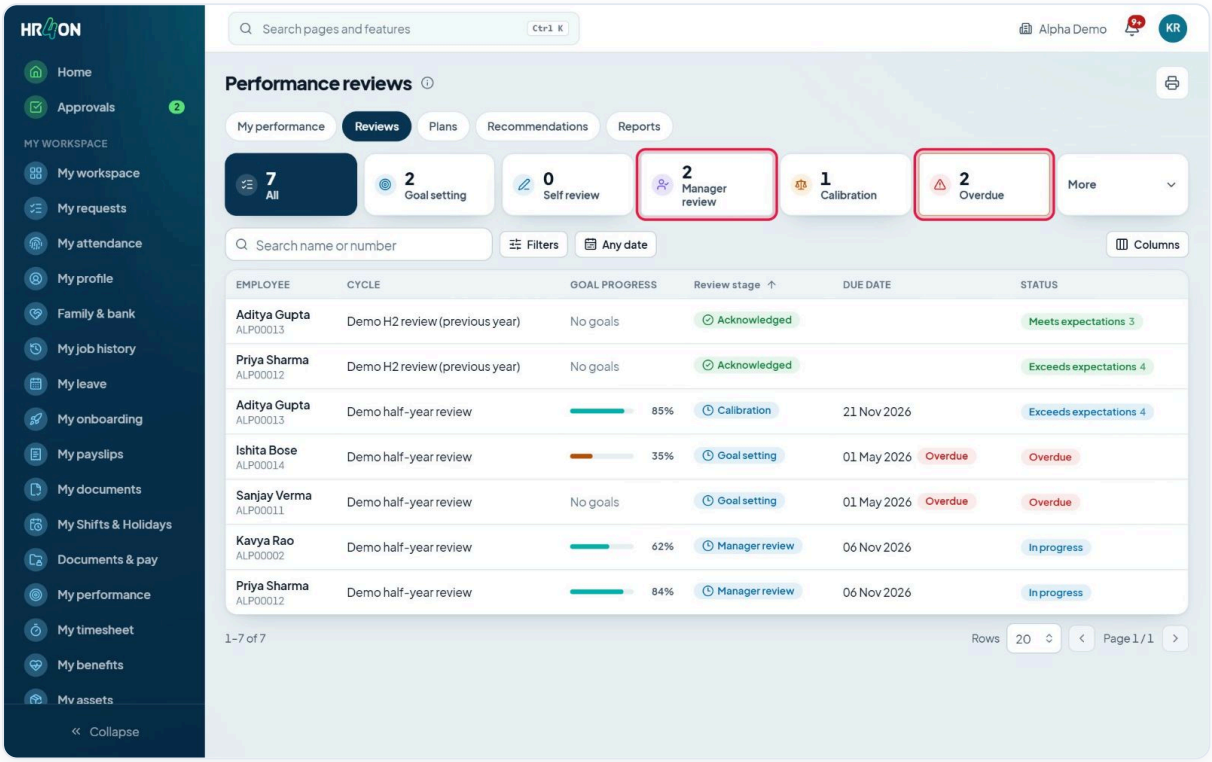
Agree goals with your team, hold check-ins, assess at review time and support development.

6.1 Your team's reviews

Performance › **Reviews** lists every review for your team.

WHAT YOU SEE

- Filter by stage: **Goal setting**, **Self review**, **Manager review**, **Calibration**, or show **Overdue** ones.
- Each row shows the employee, the cycle, goal progress, the review stage, the due date and the status or final rating.



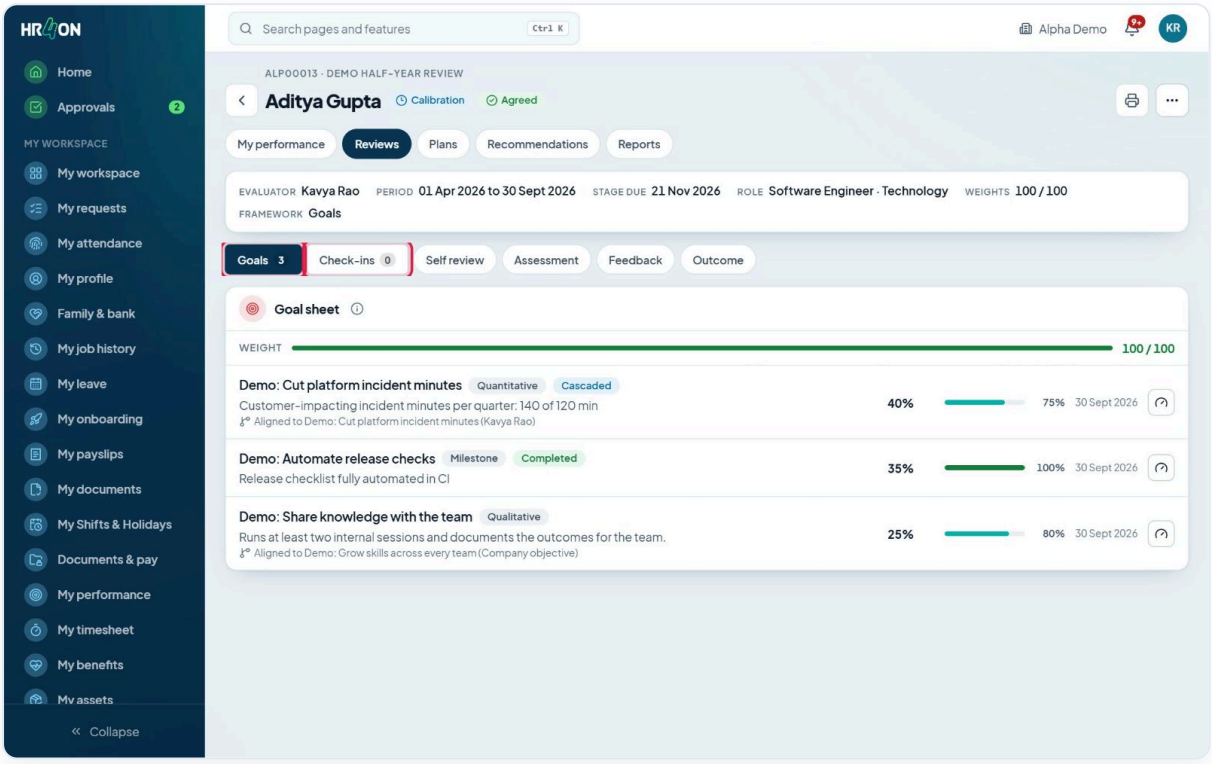
6.2 Goals and check-ins

Open a review to see the person's goal sheet, check-ins and feedback.

WHAT YOU SEE

- **Goals**: each goal with type, weight, progress and due date; goals can be **Cascaded** from yours.
- **Check-ins**: notes from your conversations during the period.
- **Self review**: what the employee wrote about their year.
- **Feedback**: feedback from colleagues.

> **TIP**
> - Hold check-ins regularly; they make the year-end review faster and fairer.



6.3 Write your assessment

At the manager-review stage, rate each goal, describe strengths and areas to develop, and propose an overall rating.

HOW TO DO IT

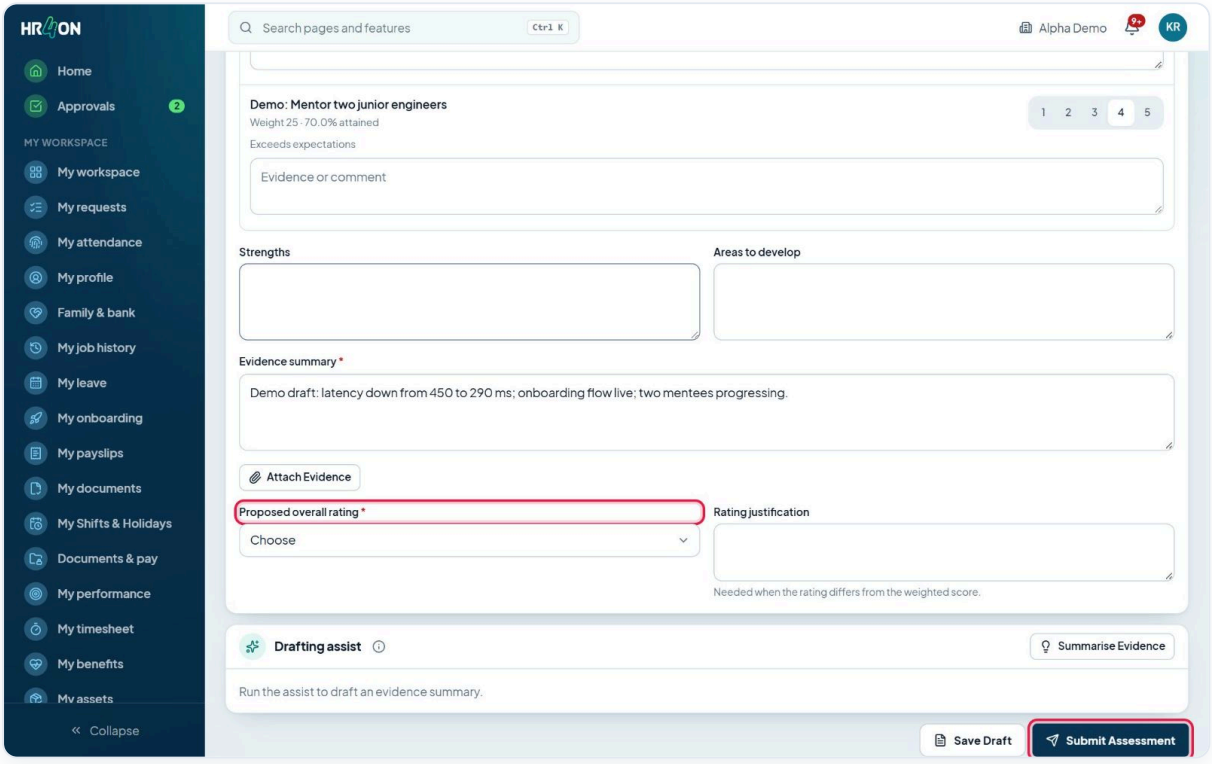
1. Open the review and select **Complete Assessment** (or the **Assessment** tab).
2. Rate each goal from 1 to 5. The weighted score is worked out for you.
3. Fill in **Strengths**, **Areas to develop** and the **Evidence summary**. Attach evidence if useful.
4. Choose the **Proposed overall rating**. If it differs from the weighted score, explain why in **Rating justification**.
5. Select **Save Draft** as you go and **Submit Assessment** when done.

TIP

- **Summarise Evidence** drafts an evidence summary from check-ins and feedback. Always read and edit it before you use it.

GOOD TO KNOW

- After you submit, the rating may be calibrated with other managers before it is final. The employee sees the outcome when HR releases it.



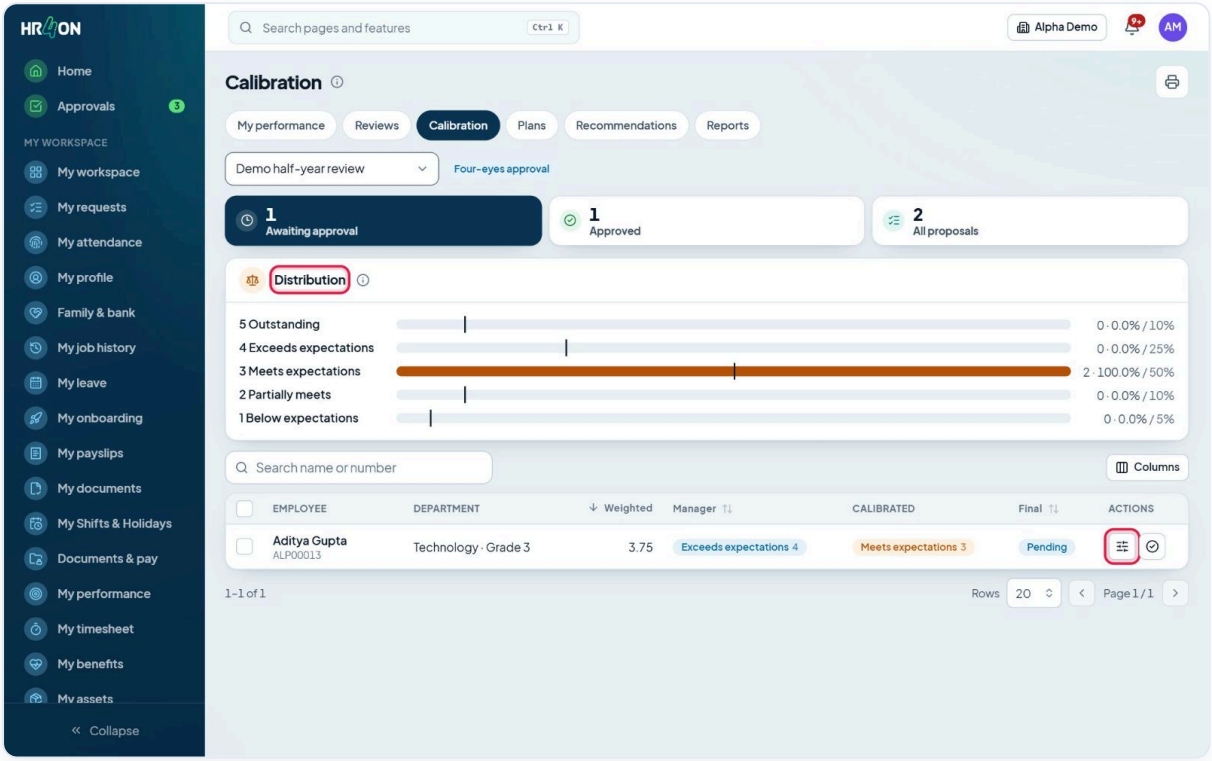
6.4 Calibration

Where your company calibrates ratings, senior managers compare ratings across teams so they are fair. The calibration page shows the rating distribution against the target and each proposal.

WHAT YOU SEE

- **Distribution**: how many people are in each rating, against the guide percentage.
- Each row shows the weighted score, the manager's rating, the calibrated rating and the final one.
- Calibrators use **Adjust rating** and **Approve outcome**.

> **GOOD TO KNOW**
> - Only managers who take part in calibration see this page.

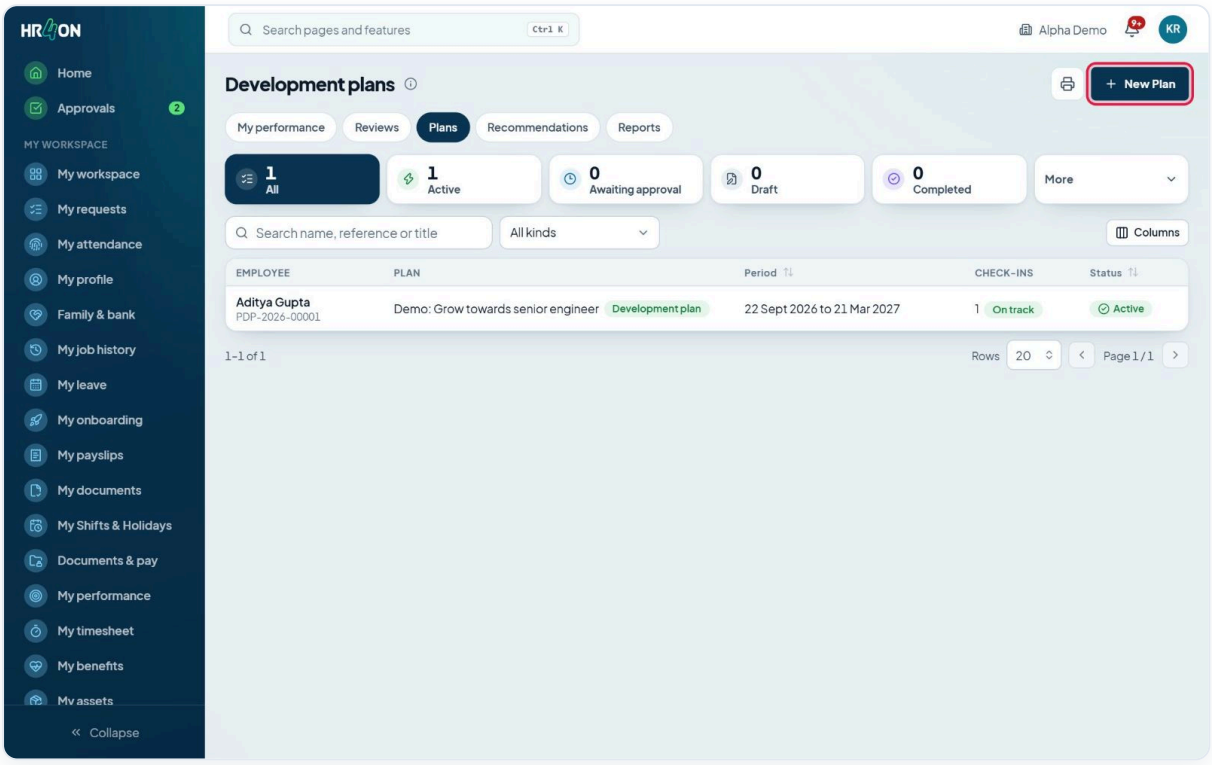


6.5 Development plans

Plans holds development and improvement plans for your team, with check-ins and progress.

HOW TO DO IT

1. Open **Performance** › **Plans**, or select **Development Plan** on a team member's page.
2. Select **New Plan**, choose the person and kind of plan, and set the period and goals.
3. Record check-ins as the plan goes on.



6.6 Probation reviews

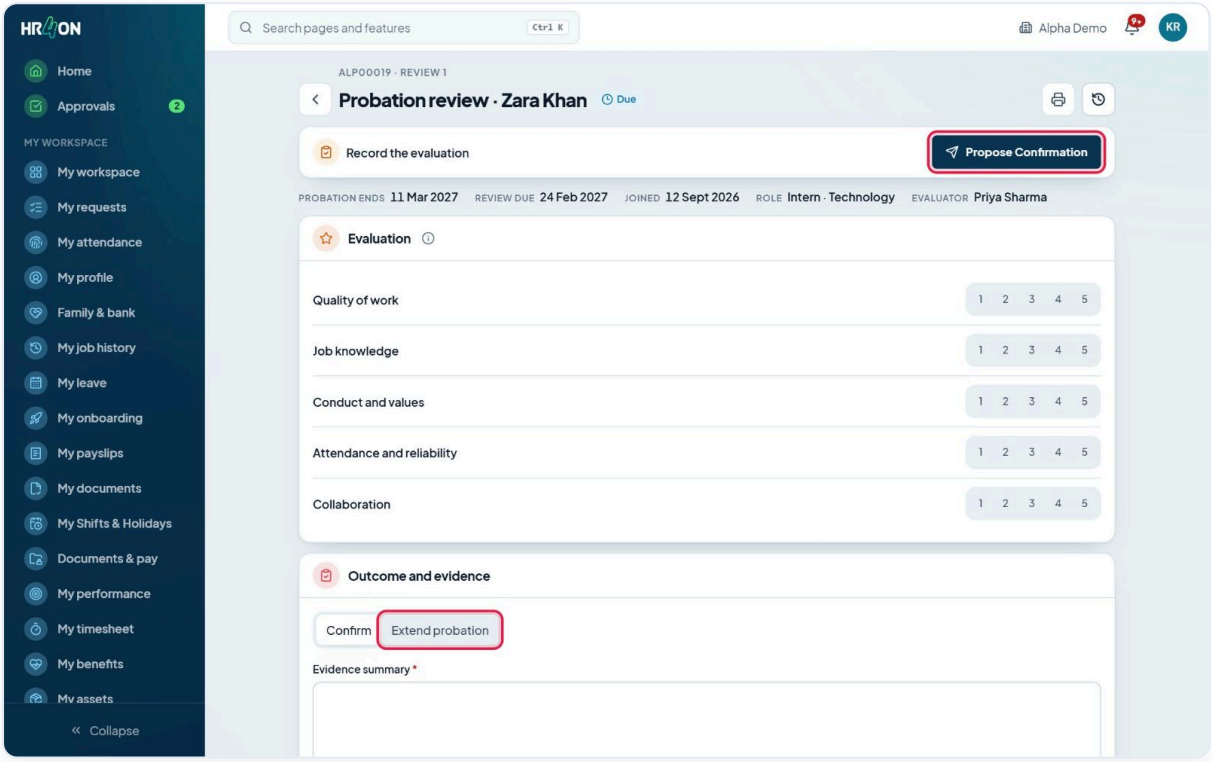
New joiners on probation need a review before it ends: confirm them or extend the probation.

HOW TO DO IT

1. Open **Probation Reviews** from **Team Actions** (or **Employment changes** › **Probation**).
2. Open the person's review.
3. Rate **Quality of work**, **Job knowledge**, **Conduct and values**, **Attendance and reliability** and **Collaboration**.
4. Choose **Confirm** or **Extend probation**, write the **Evidence summary** and select **Propose Confirmation**.

GOOD TO KNOW

- Your proposal goes to HR for approval. Finish it before the review due date.



07 Merit planning

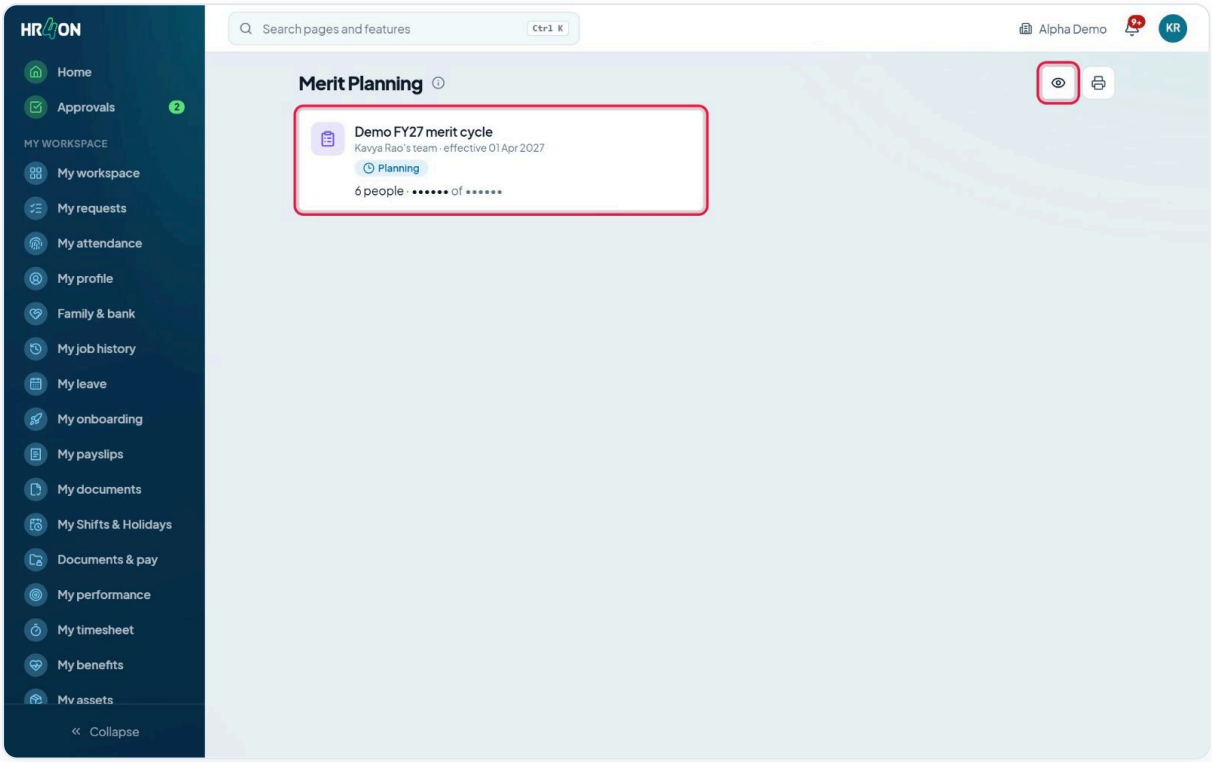
During a pay review cycle, you propose increases for your team within a budget, and HR reviews them.

7.1 Your merit worksheets

Merit Planning lists the worksheets for your team in the current cycle, with the number of people and the status (for example **Planning** or **HR Review**).

HOW TO DO IT

1. Open **Merit Planning** in the menu.
2. Select **Show amounts** (the eye icon) when it is private to do so.
3. Select the worksheet to open it.



7.2 Fill in the worksheet

The worksheet lists each eligible person with their current pay, position in the range and the guideline increase.

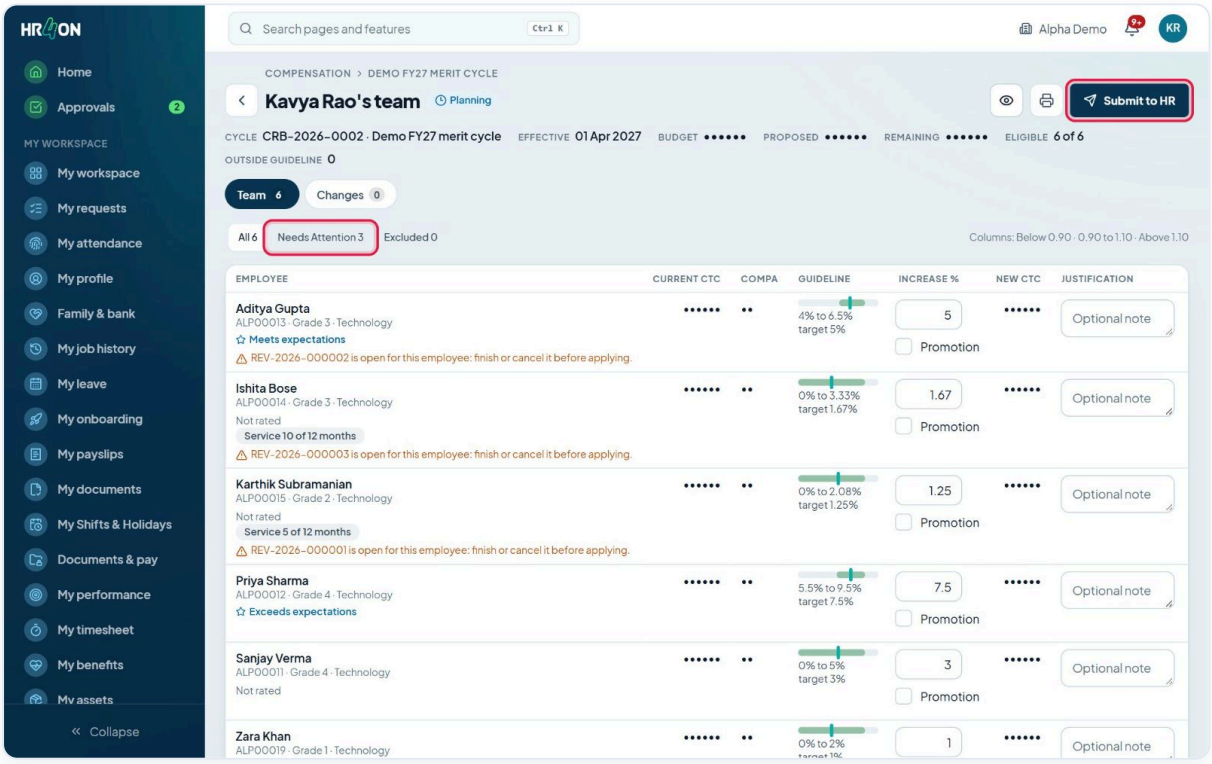
WHAT YOU SEE

- **BUDGET**, **PROPOSED** and **REMAINING** at the top; **ELIGIBLE** and **OUTSIDE GUIDELINE** counts.
- **COMPA** (compa-ratio): pay compared with the middle of the range. Colours show below 0.90, 0.90 to 1.10 and above 1.10.
- **GUIDELINE**: the suggested range and target for the person's rating, for example *5.5% to 9.5% target 7.5%*.
- Enter the **INCREASE %**; **NEW CTC** updates. Tick **Promotion** if the increase comes with a promotion. Add a **JUSTIFICATION** note, needed when you go outside the guideline.
- A warning under a name (for example *REV-2026-000002 is open for this employee*) means another pay change is in progress; it must be finished or cancelled before this one is applied.
- **Needs Attention** shows people with an open issue, such as another pay change in progress.

HOW TO DO IT

1. Select the eye icon to show the amounts.
2. Enter an increase for each person.
3. Keep within the budget; **REMAINING** updates as you type. The **Changes** tab lists what you changed.
4. Select **Submit to HR** when you are done.

> **GOOD TO KNOW**
> - Proposals are confidential. HR reviews and approves them; employees see the outcome only when letters are issued.

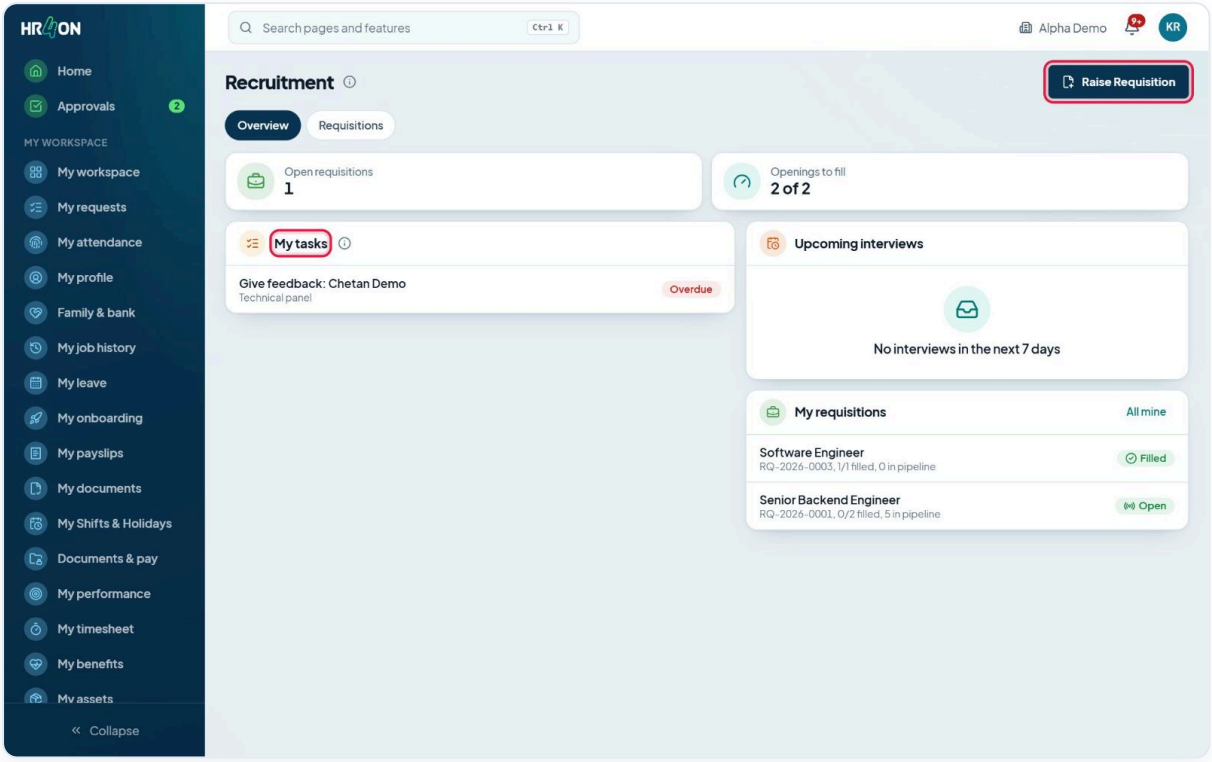


08 Hiring for your team

As a hiring manager you raise a request to hire, follow candidates and give interview feedback. HR runs the rest of the process.

8.1 Recruitment overview

Recruitment shows your open requisitions, your tasks (such as feedback due) and upcoming interviews.

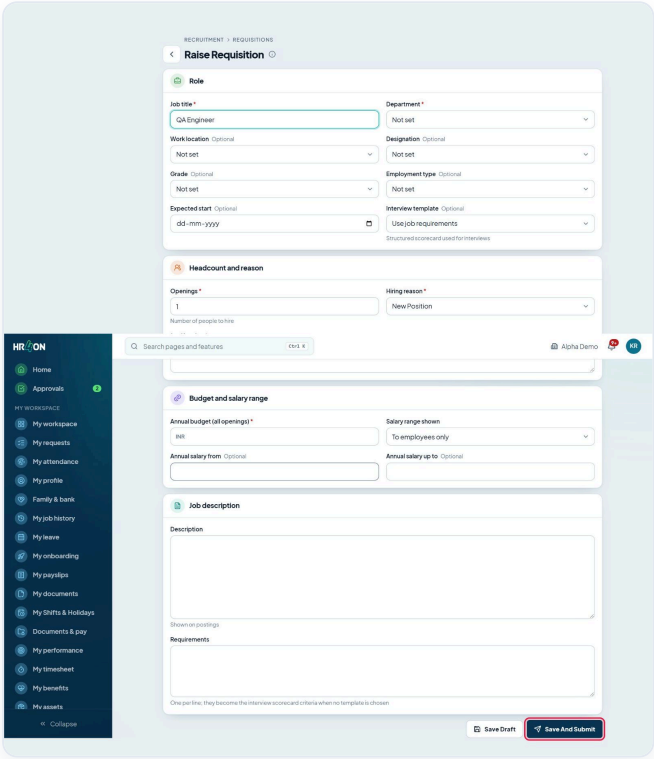


8.2 Raise a requisition

A requisition asks for approval to hire. Once approved, HR posts the job.

HOW TO DO IT

1. Select **Raise Requisition** (or **Raise Hiring Request** on My Team).
2. **Role**: **Job title**, **Department**, and optionally location, designation, grade, employment type, expected start and interview template.
3. **Headcount and reason**: number of **Openings**, **Hiring reason** (for example *New Position* or *Replacement*) and **Justification**.
4. **Budget and salary range**: the **Annual budget (all openings)**, whether the range is shown, and the salary range.
5. **Job description**: the **Description** and **Requirements** (one per line; they become the interview scorecard if no template is chosen).
6. Select **Save And Submit**, or **Save Draft** to finish later.

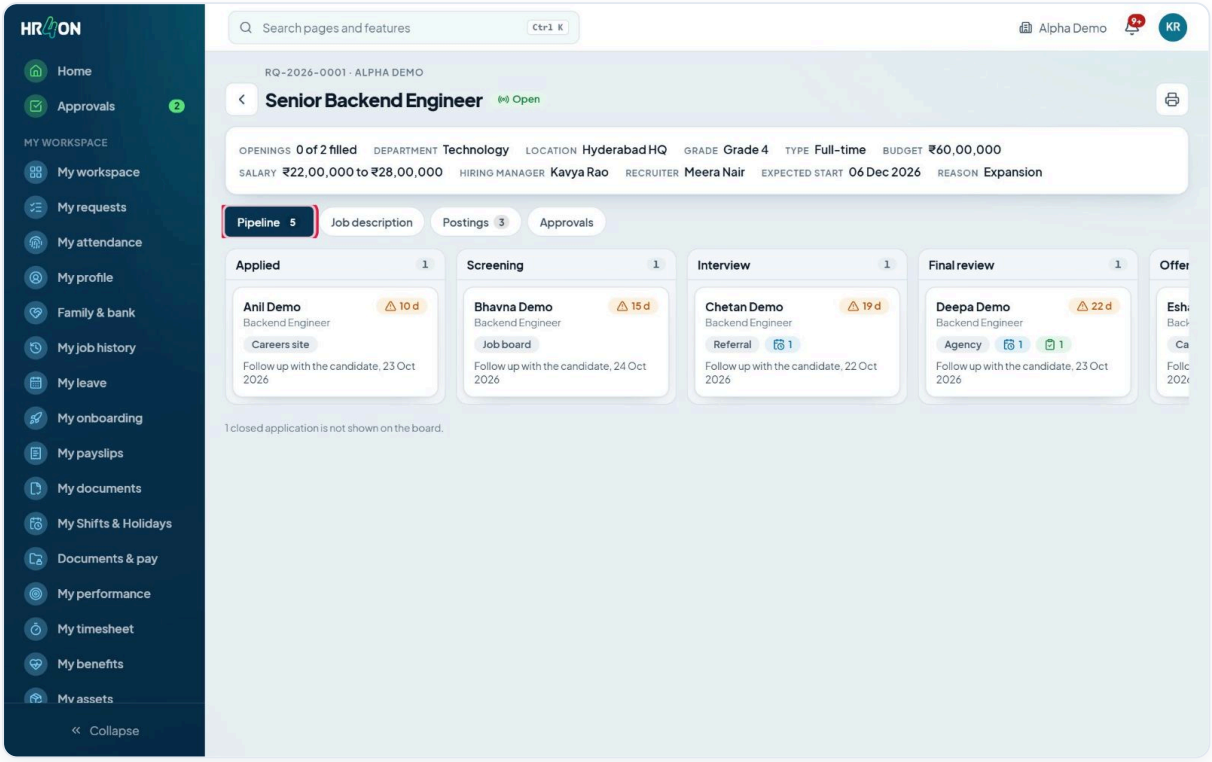


8.3 Follow the pipeline

Open a requisition to see its candidates on a board, from **Applied** to **Hired**.

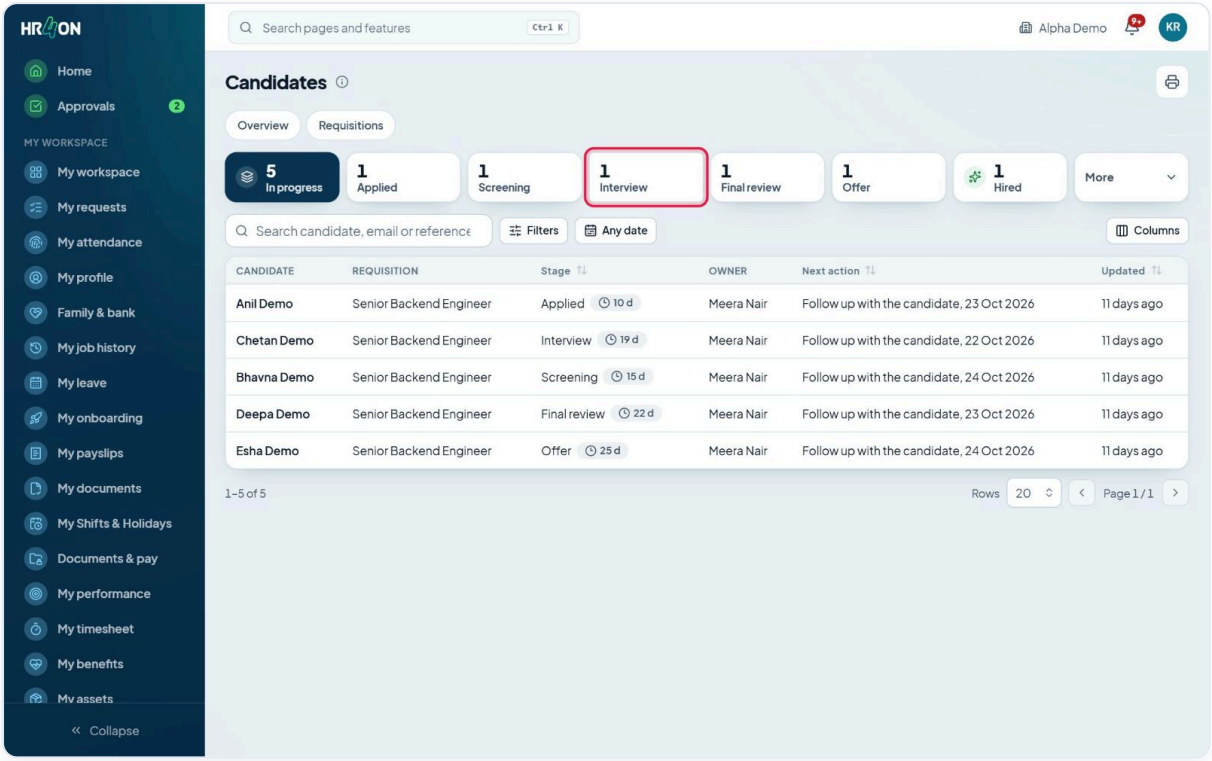
WHAT YOU SEE

- The header shows openings filled, budget, salary range, hiring manager, recruiter and expected start.
- **Pipeline**: candidates by stage, with days in stage, source and next action.
- **Job description**, **Postings** and **Approvals** tabs.



8.4 Candidates

Candidates lists every application for your requisitions by stage. Select one to see the CV, interviews and feedback.



8.5 Give interview feedback

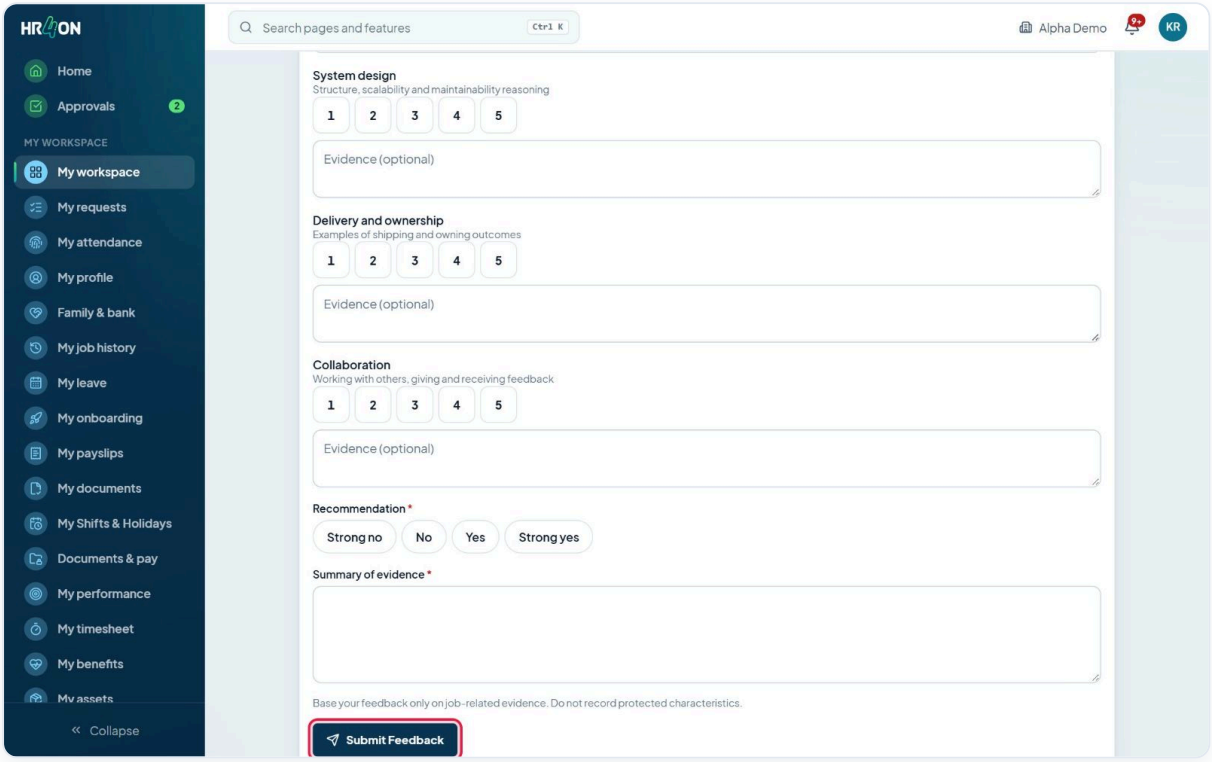
After each interview, score the candidate while it is fresh.

HOW TO DO IT

1. Open the interview from **My tasks** or **My interviews**.
2. Rate each scorecard area from 1 to 5.
3. Choose a **Recommendation** and write the **Summary of evidence**.
4. Select **Submit Feedback**.

GOOD TO KNOW

- Base feedback only on job-related evidence. Do not record protected characteristics.
- Panel members do not see each other's feedback until they have submitted their own.



09 Onboarding a new team member

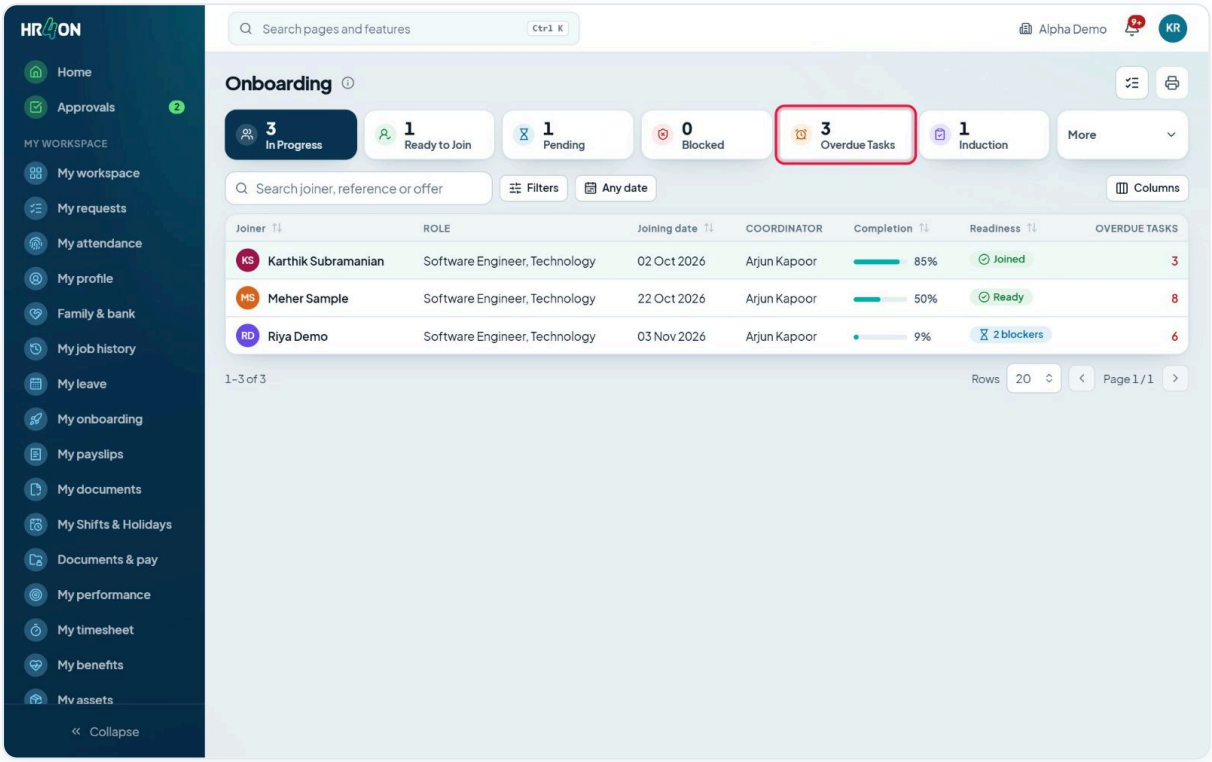
A great first week depends on you as much as on HR. HR4ON lists the tasks that are yours and shows how each joiner is getting on.

9.1 Joiners in your team

Onboarding lists people joining your team, with their joining date, coordinator, completion and readiness.

WHAT YOU SEE

- **In Progress**, **Ready to Join**, **Pending**, **Blocked**, **Overdue Tasks** and **Induction**.
- **Blockers** (such as a missing identity document) stop the joiner's accounts being activated.

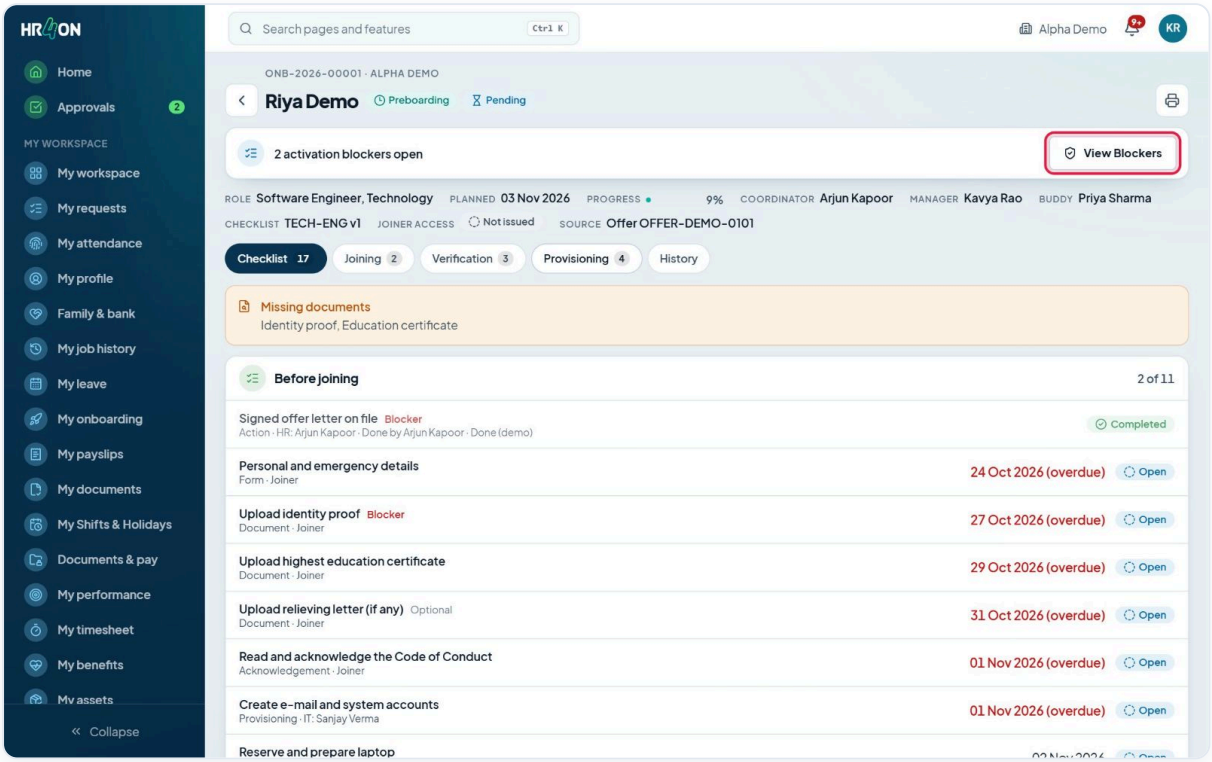


9.2 A joiner's checklist

Open a joiner to see every task, who owns it and when it is due.

WHAT YOU SEE

- The header shows the role, planned joining date, progress, coordinator, manager, buddy and any blockers (**View Blockers**).
- **Checklist** , **Joining** , **Verification** , **Provisioning** and **History** tabs.

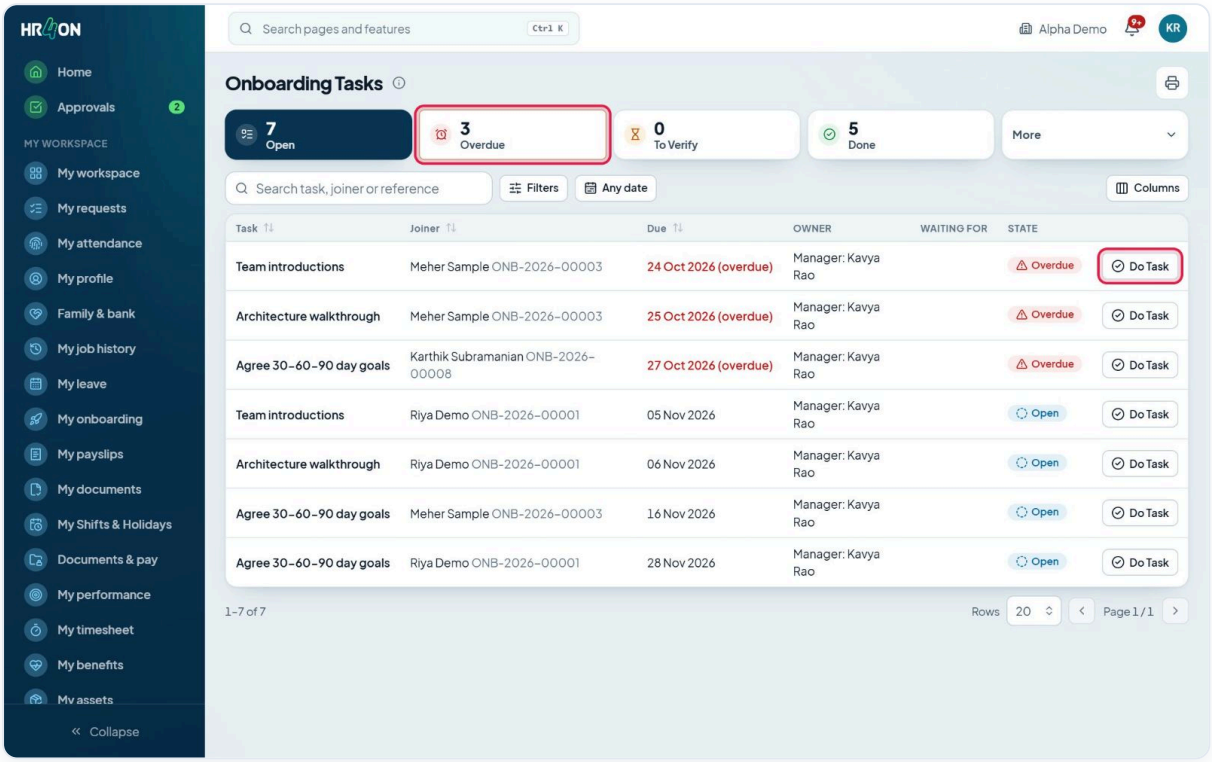


9.3 Your onboarding tasks

Onboarding Tasks lists the tasks assigned to you as manager, such as team introductions, an architecture walkthrough or agreeing 30–60–90 day goals.

HOW TO DO IT

1. Open **Onboarding Tasks**.
2. Select **Do Task** on a task.
3. Complete it and mark it done.

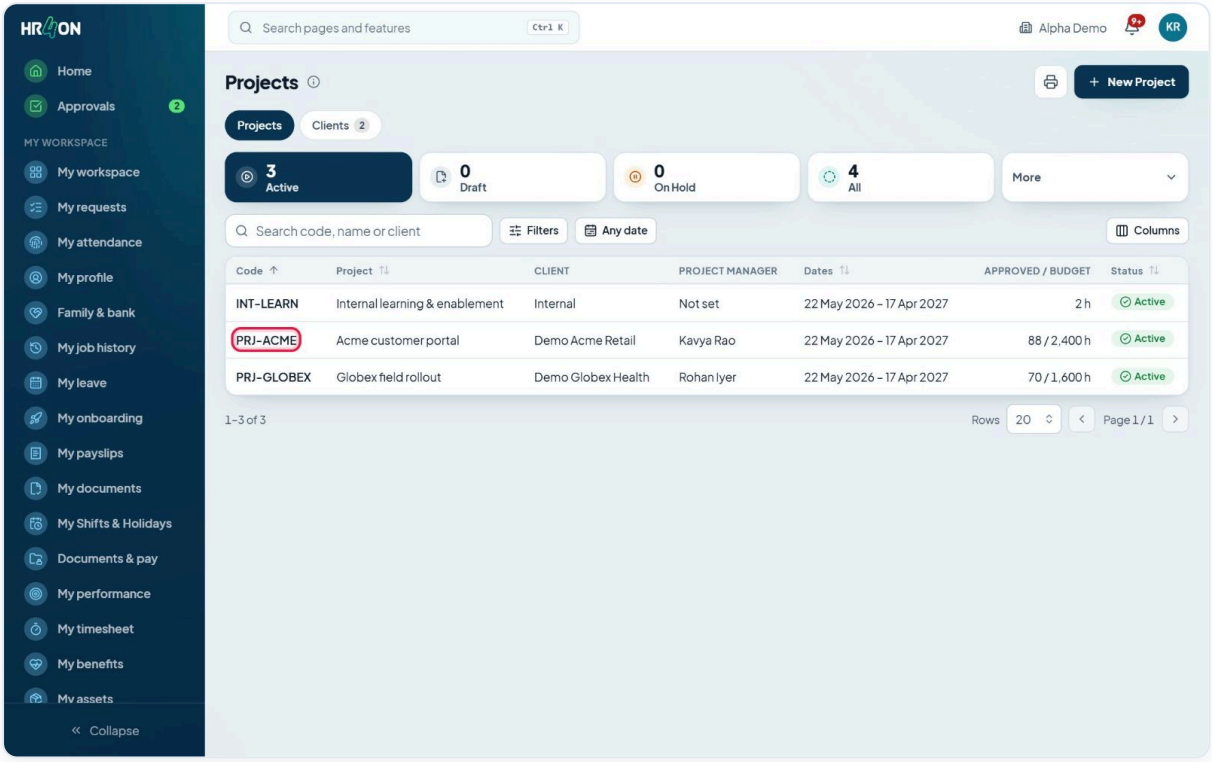


10 Projects and rosters

If you run projects or plan shifts, these pages help you staff the work.

10.1 Projects

Projects lists the projects you can see, with client, project manager, dates, hours approved against budget and status.

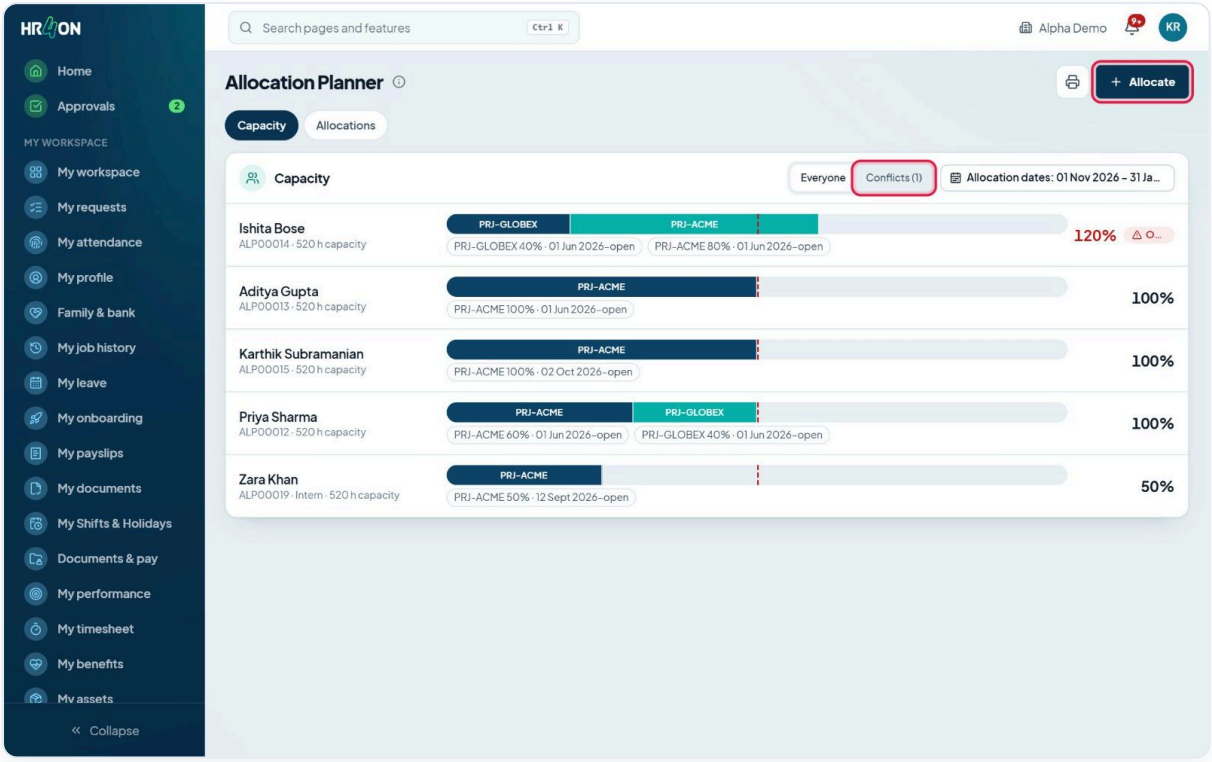


10.2 Allocation planner

Allocation planner shows how each person is allocated across projects and flags anyone over 100%.

WHAT YOU SEE

- **Capacity** view: one row per person with allocations and the total. **Over** marks over-allocation.
- **Conflicts** shows only the problems.
- Select **Allocate** to add an allocation.



10.3 Rosters

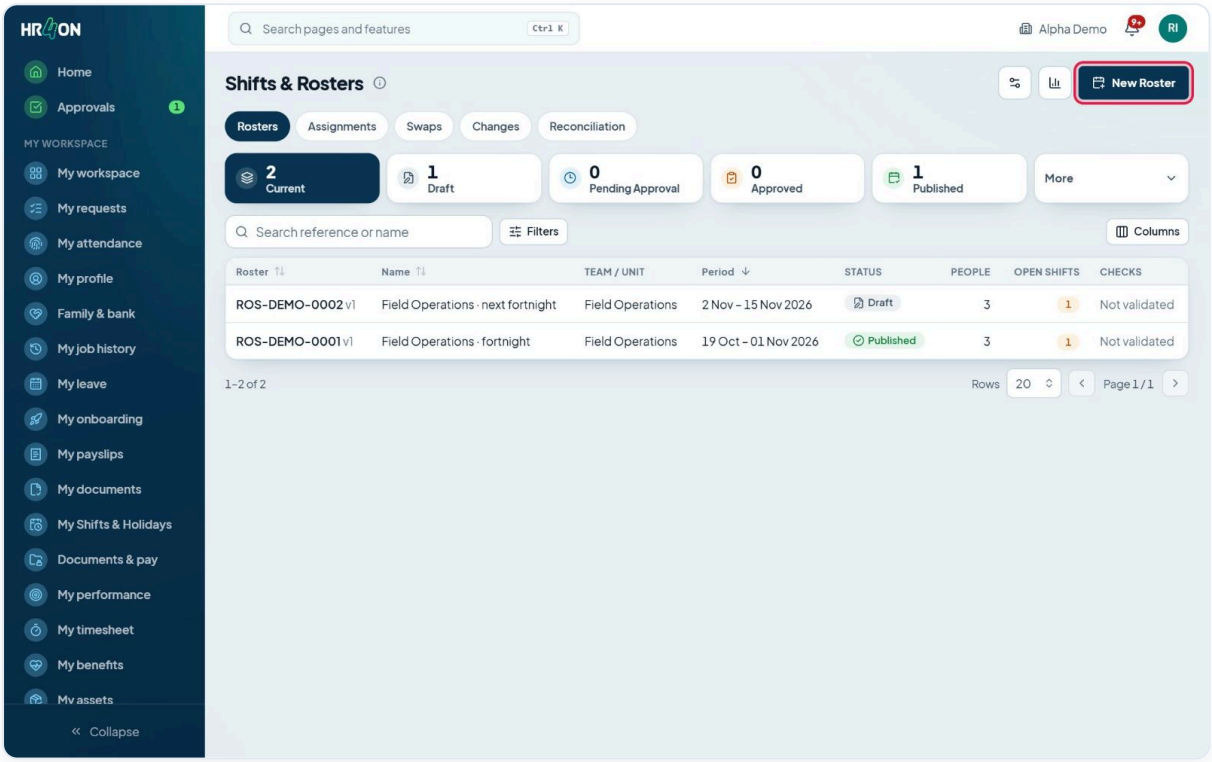
For shift teams, **Shifts & Rosters** holds the rosters you plan, from **Draft** to **Published**.

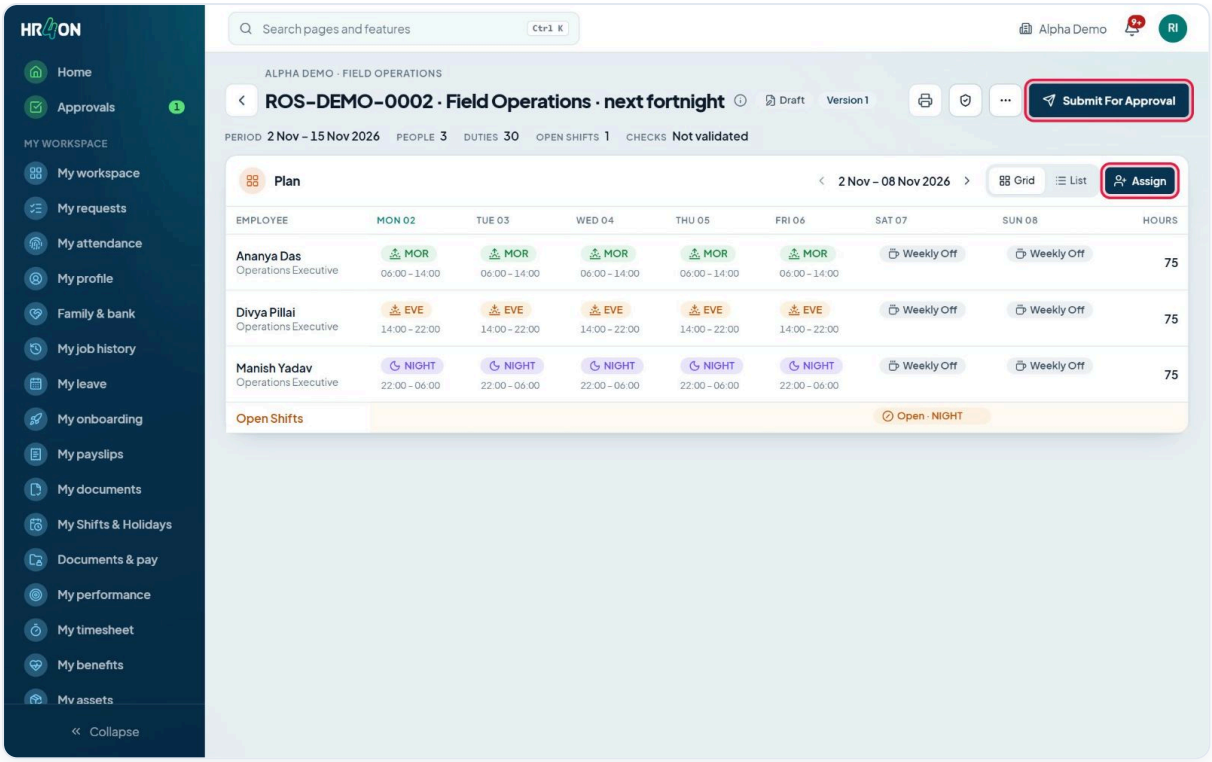
WHAT YOU SEE

- **Rosters**, **Assignments**, **Swaps**, **Changes** and **Reconciliation** tabs.
- Each roster shows the team, period, status, number of people, open shifts and validation checks.
- **New Roster** creates a draft; it can be generated from work patterns.

HOW TO DO IT

1. Select **New Roster**, choose the team and period.
2. Open the roster. In the **Grid** (or **List**) view, use **Assign** to give people shifts and fill any **Open Shifts**.
3. Run the checks (the shield button) so **CHECKS** no longer shows *Not validated*.
4. Select **Submit For Approval**. Once approved and published, your team sees the shifts in **My Shifts & Holidays**.





A draft roster: one row per person, one column per day.

11 Employment changes and exits

Propose transfers, promotions and other changes for your team, and start an exit when someone leaves.

11.1 Propose a change

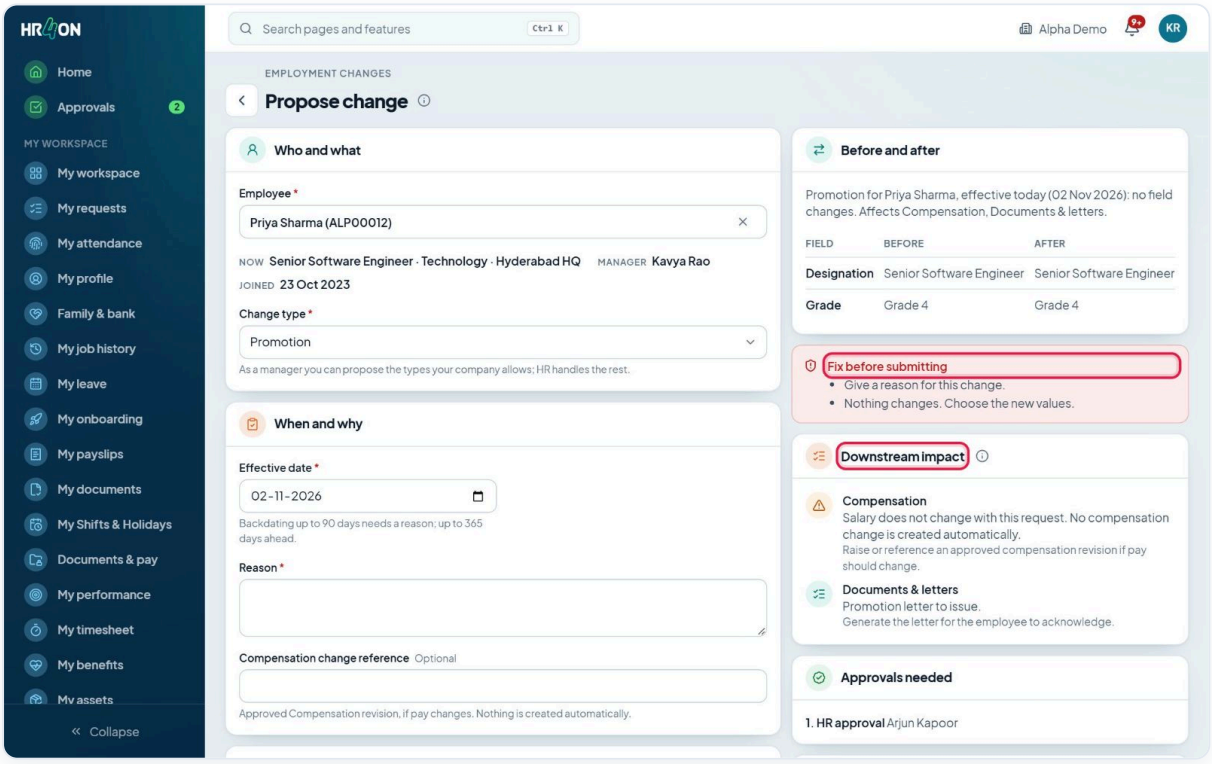
Use **Propose Change** for promotions, transfers, manager changes, work-mode changes and other job changes.

HOW TO DO IT

1. Open the team member's page and select the action, for example **Propose Promotion**, or select **Propose Change** on My Team.
2. Check the employee and the **Change type**. As a manager you can propose the types your company allows; HR handles the rest.
3. Under **When and why**, set the **Effective date** (backdating needs a reason) and the **Reason**. Add a **Compensation change reference** if pay changes too.
4. Under **Proposed values**, choose the new values, for example the designation and grade.
5. Check the panels on the right: the before-and-after table, **Downstream impact** (pay, letters, access), **Approvals needed** and **Payroll periods**. Anything missing is listed under **Fix before submitting**.
6. Select **Submit** to send for approval, or **Save Draft**.

GOOD TO KNOW

- Changes go to HR (and sometimes your manager) for approval and take effect on the effective date.

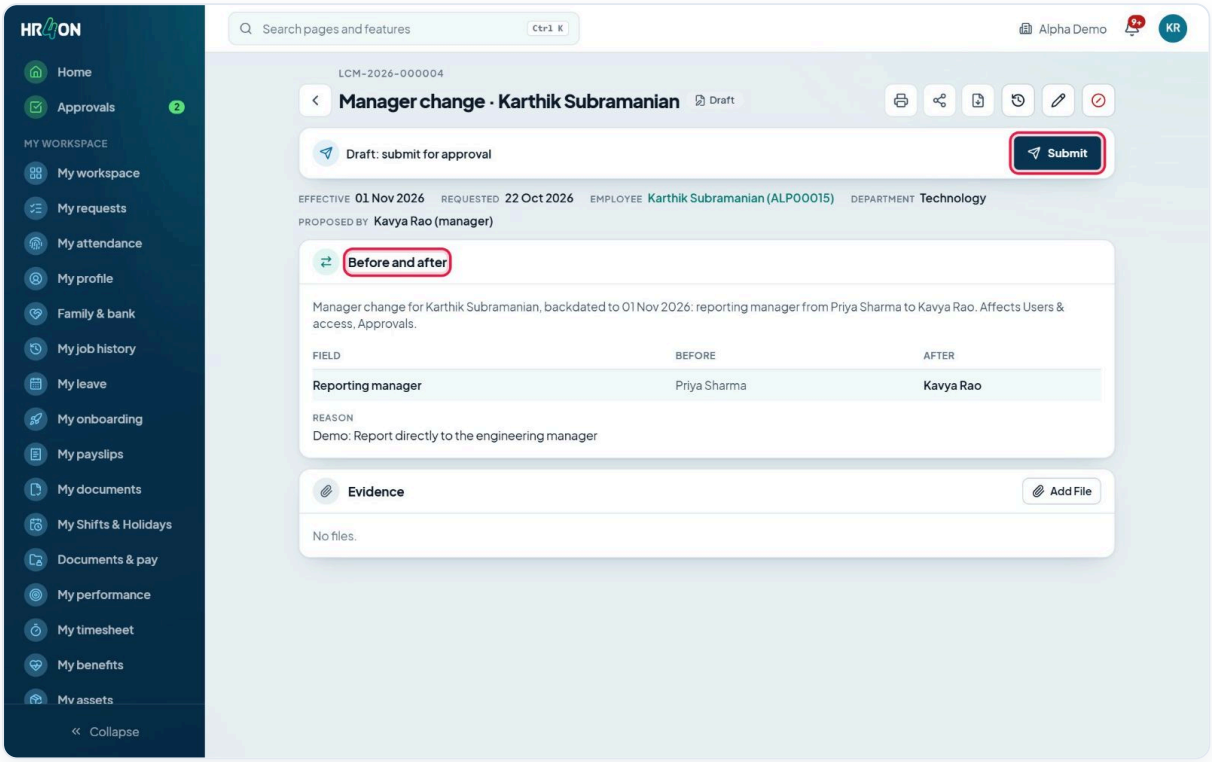


11.2 Follow a change

Employment changes lists the changes you proposed with their status: **Draft**, **In review**, **Scheduled**, **Executed** or **Blocked**.

WHAT YOU SEE

- Open one to see **Before and after**, the reason and any evidence.
- A draft can be edited, submitted or cancelled.



11.3 Start an exit for a team member

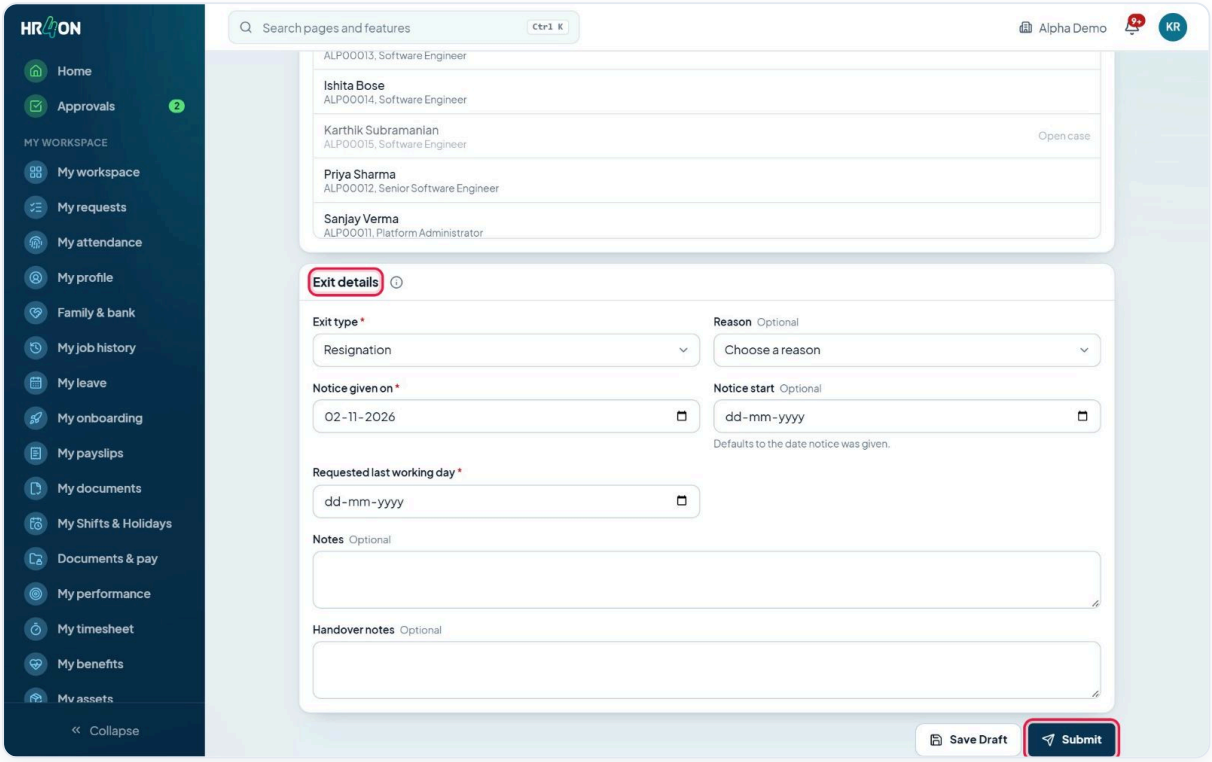
When someone tells you they are leaving (or their contract ends), start the exit so HR can plan notice, handover and settlement.

HOW TO DO IT

1. Select **Initiate Exit** on My Team.
2. Find the employee.
3. Choose the **Exit type**: **Resignation**, **Retirement**, **Contract end** or **Mutual separation**, and the reason.
4. Enter the date **Notice given on** and the **Requested last working day**.
5. Add notes and **Handover notes**, then select **Submit**.

GOOD TO KNOW

- Resignations an employee submits themselves come to you automatically; you do not need to start them again.

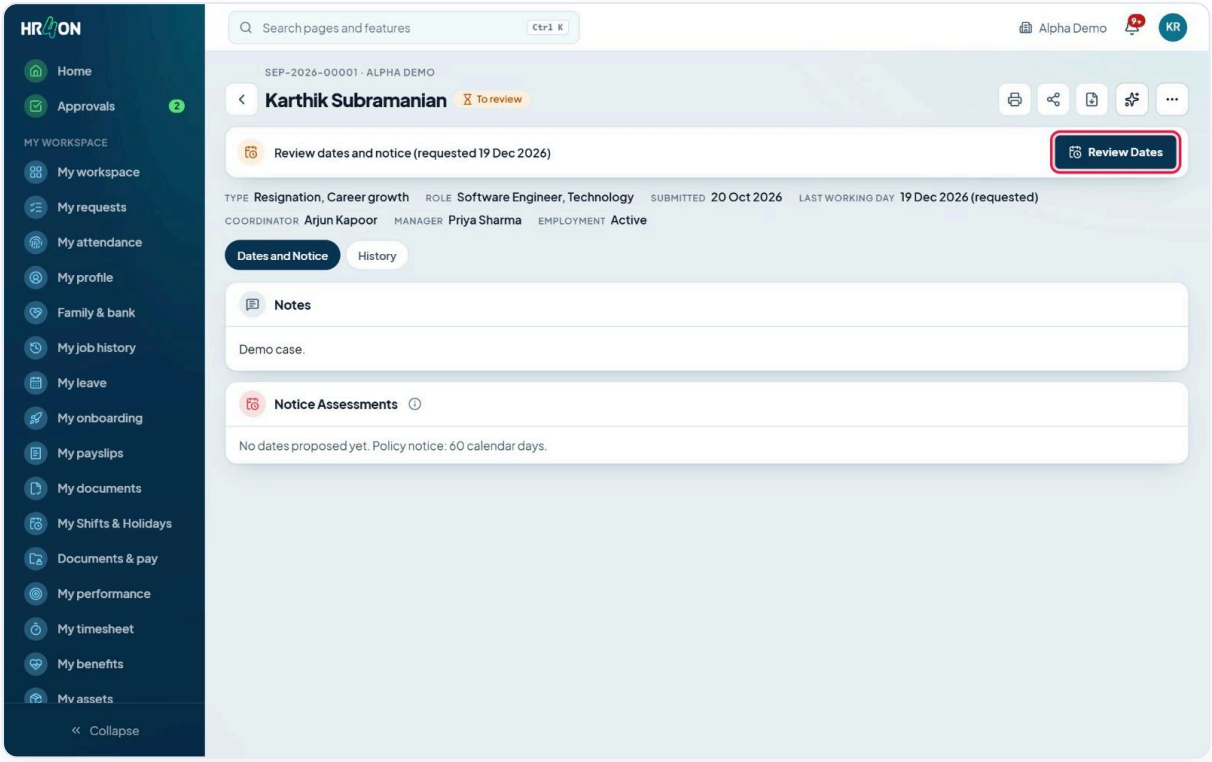


11.4 Review an exit

Open a separation to agree dates and notice, and to see the handover summary.

WHAT YOU SEE

- **Review Dates** lets you agree or propose the last working day against the notice policy.
- **Outstanding and Handover Summary** lists assets, tasks and approvals to hand over.
- **Separations** lists all exits in your team by status.

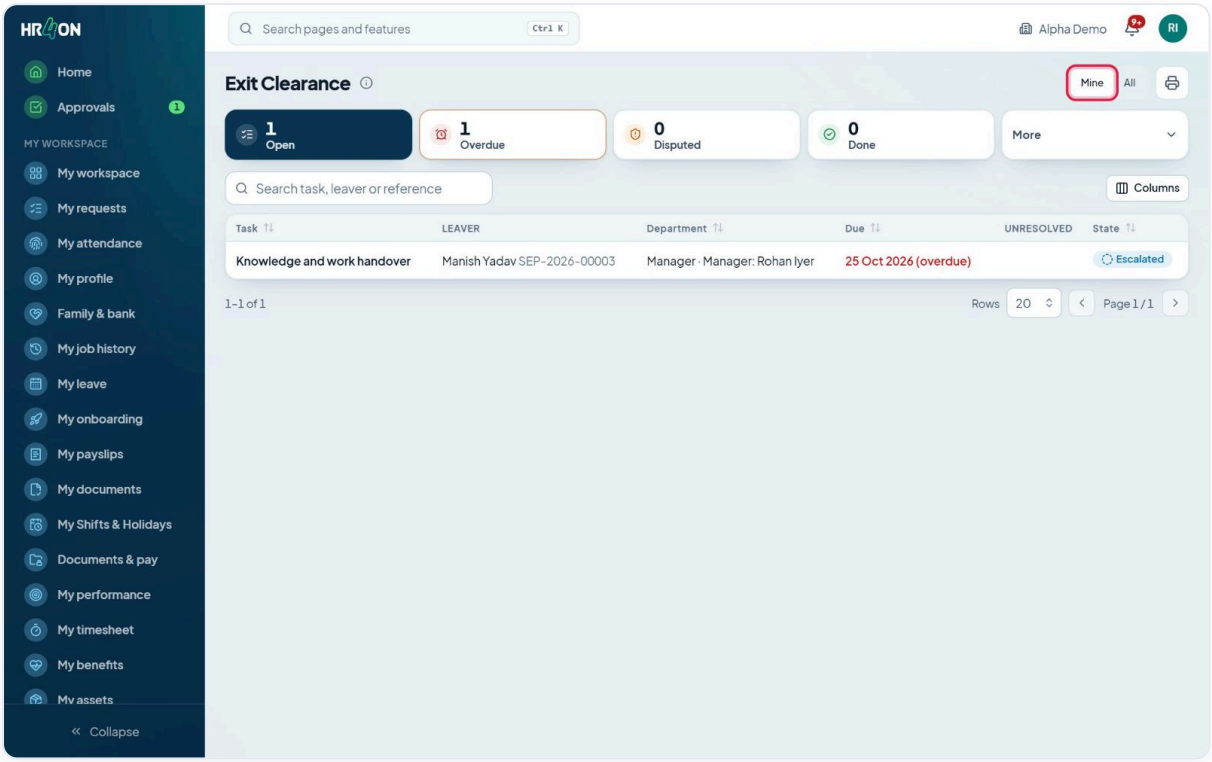


11.5 Exit clearance

Exit Clearance lists the tasks you own for leavers, such as knowledge and work handover. Complete them before the last working day.

WHAT YOU SEE

- **Mine** shows your tasks; **All** shows every task you can see.
- **Open**, **Overdue**, **Disputed** and **Done** filter the list. Overdue tasks are escalated.



12 Recognition and learning

Thank people publicly, nominate them for awards and make sure they keep learning.

12.1 Recognise your team

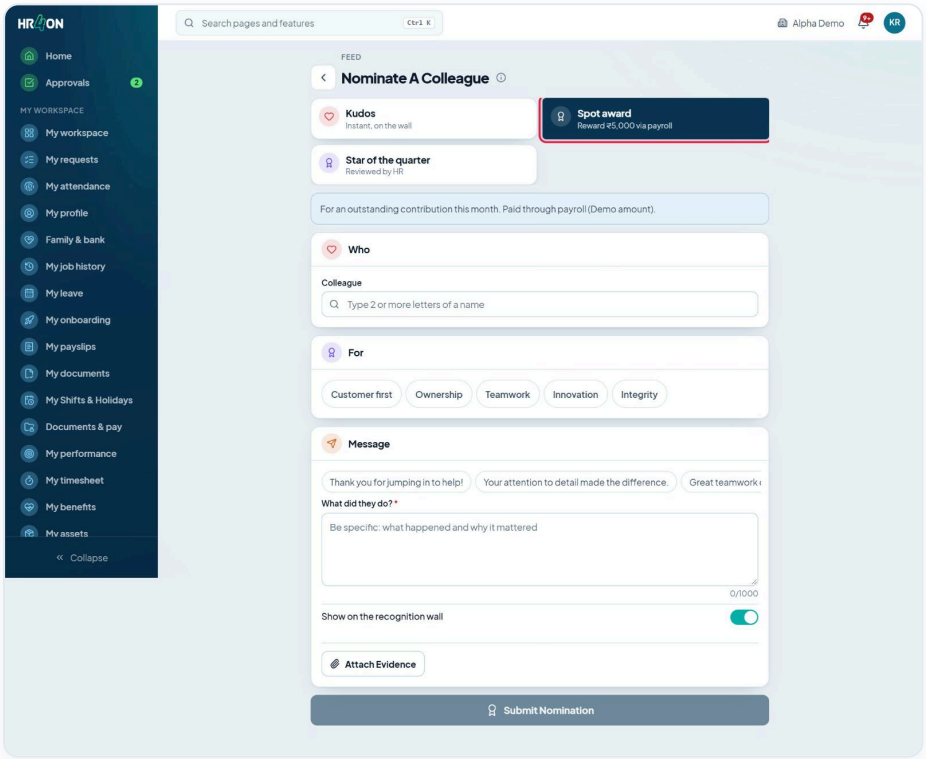
Give kudos for everyday wins, or nominate for an award such as a spot award or star of the quarter.

HOW TO DO IT

1. Select **Give Kudos** on My Team or a member's page.
2. Choose **Kudos**, **Spot award** or **Star of the quarter**. For an award the page becomes **Nominate A Colleague** and explains the award.
3. Under **Who**, find the **Colleague**; under **For**, pick the value; then write **What did they do?**.
4. Send it with the button at the bottom of the page.

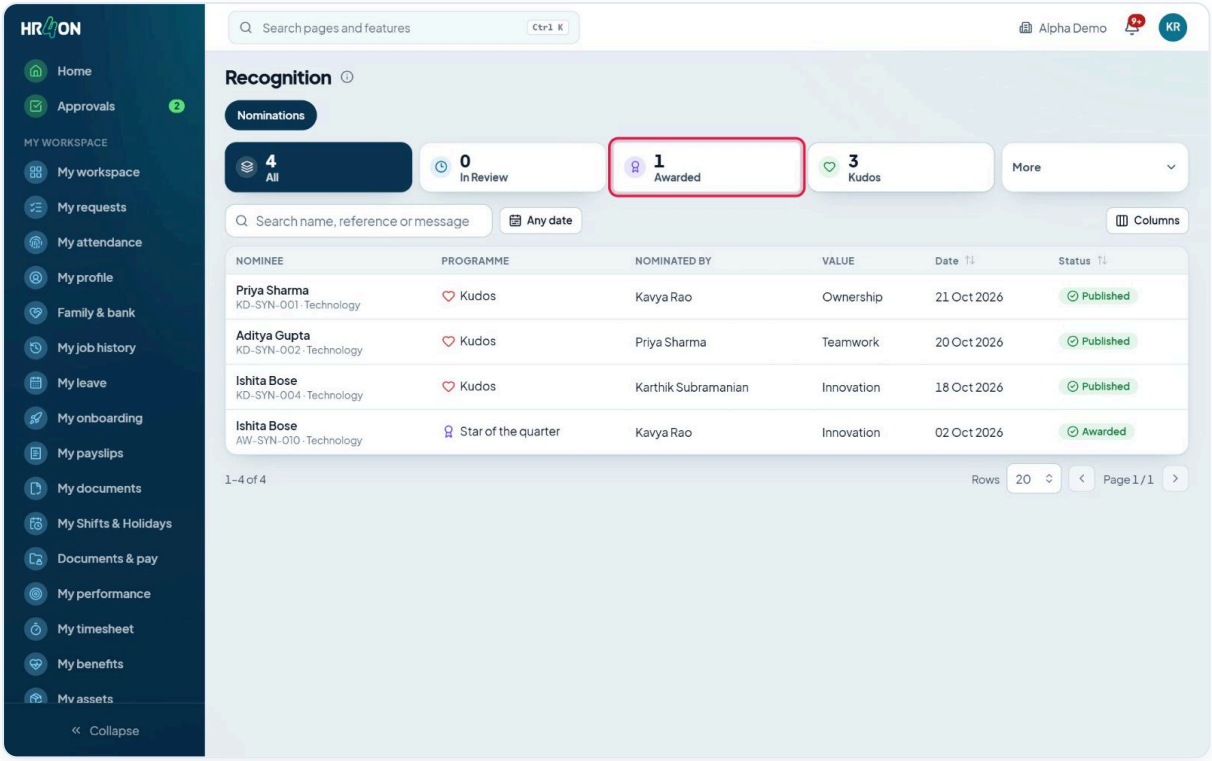
GOOD TO KNOW

- Awards with a reward are reviewed by HR before they are given. Spot award money is paid through payroll.



12.2 Nominations

Recognition › **Nominations** lists the kudos and awards in your area with status: **Published**, **In Review** or **Awarded**.



12.3 Your team's learning

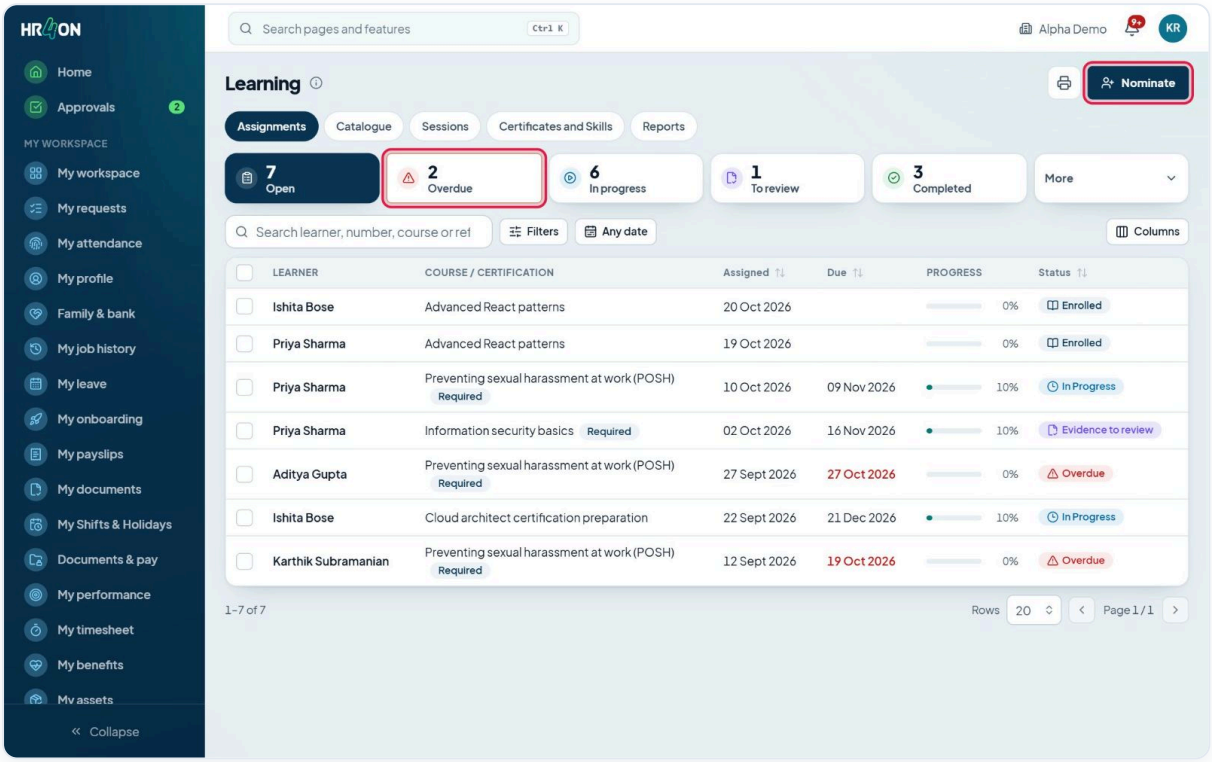
Learning › **Assignments** shows every course assigned to your team and its progress.

WHAT YOU SEE

- **Open**, **Overdue**, **In progress**, **To review** (evidence you need to check) and **Completed**.
- Required courses that are overdue also appear on My Team under **Coming Up**.

HOW TO DO IT

1. To assign a course, select **Nominate**, or use **Catalogue** and select **Nominate** on a course.
2. Choose the people and a due date.



A Words used in this guide

Calibration
A meeting or process where managers compare ratings across teams so they are fair, before they are final.

Compa-ratio
Pay divided by the middle of the pay range for the grade. 1.00 means exactly at the midpoint.

Delegation
Handing your approvals to another person for a set period.

Direct report
Someone who reports to you. **Indirect** reports report to your direct reports; **matrix** reports work for you on a project.

Escalation
When a request is overdue, it is passed up to the next manager as well. Nothing is decided automatically.

Exception
An attendance day that needs attention, such as a missing punch. A **blocker** stops the day being paid until it is fixed.

Guideline
The suggested increase range for a person's rating in a merit cycle.

Impact
How much attention a request needs. High impact requests show the reasons on hover.

Merit worksheet
Your team's list for a pay review cycle, where you propose increases.

Probation
The first months of employment, ending with a review to confirm the person or extend the period.

Requisition
A request for approval to hire for a role.

Return
Send a request back to the requester to correct and resubmit.

Safe for bulk
Low-risk requests you may decide several at a time.

Sandwich rule
Weekly offs or holidays between two leave days are charged as leave too, where the policy says so.