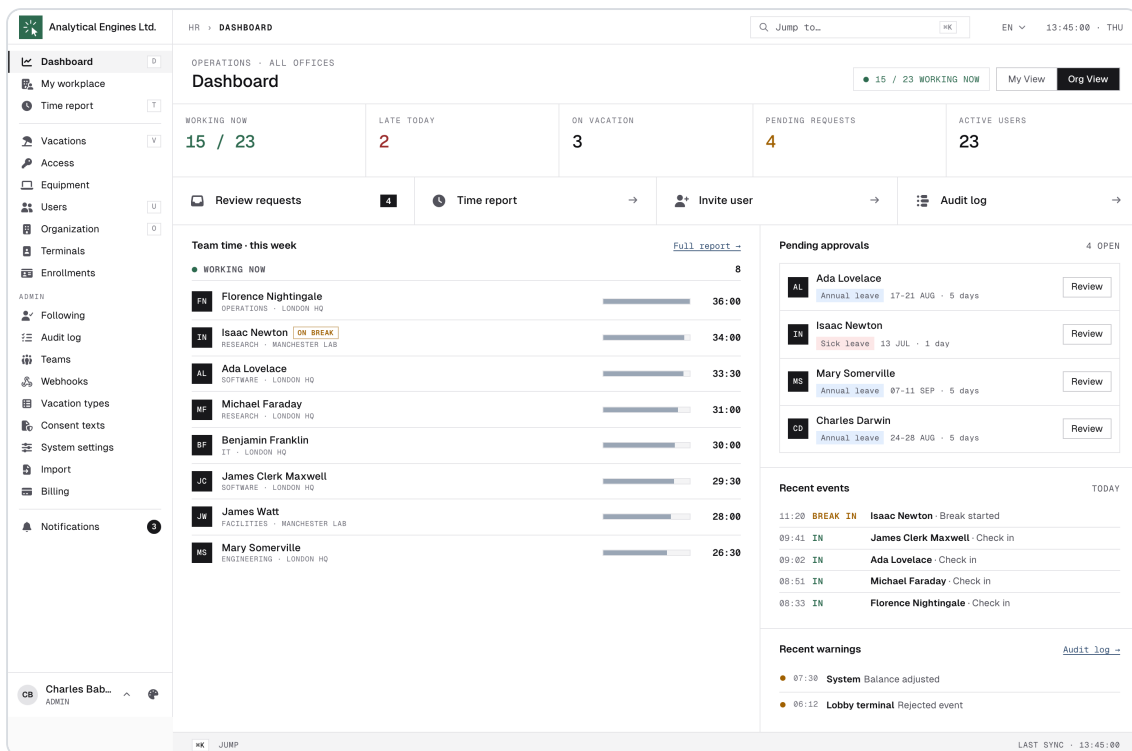




Administrator Guide

People, organisation, policies and system administration



For users with the **HR Admin** role. This guide covers the admin-only pages; day-to-day flows live in the companion guides (section 1).

Applies to HR.Click Web · Document v1.2 · September 2026

Administering HR.Click

1 Your role, and where everything else is

An administrator can do everything every other role can, org-wide. Those flows are documented once, in the companion guides — this guide covers only what is **admin-only**:

TOPIC	WHERE IT'S DOCUMENTED
Everyday portal use (time, leave, requests...)	Employee Web Guide
Leave approvals, balances, vacation reports	Vacation Manager Guide
Time matrix, corrections, approvals, devices	Time Manager Guide
Shift rosters: the board, series, breaks	Shift Manager Guide
Access requests, provisioning, systems catalogue	Access Manager Guide
Face terminals: setup, pairing, enrollment, OTA, troubleshooting	Face Terminal Manual (covers the web's Terminals & Enrollments pages too)

What remains — and what this guide walks through — is: users and their lifecycle, the organisation structure, teams, leave policy (vacation types), GDPR consent texts, system settings, webhooks, the audit log, import, and billing.

THE ORG DASHBOARD

As an admin your Dashboard gains an **Org view**: live company KPIs (working now, late today, on vacation, pending requests, active users), a pending-approvals panel with inline actions, the events feed, and **Recent warnings** — the latest Warning/Critical audit entries, one click from the full log.

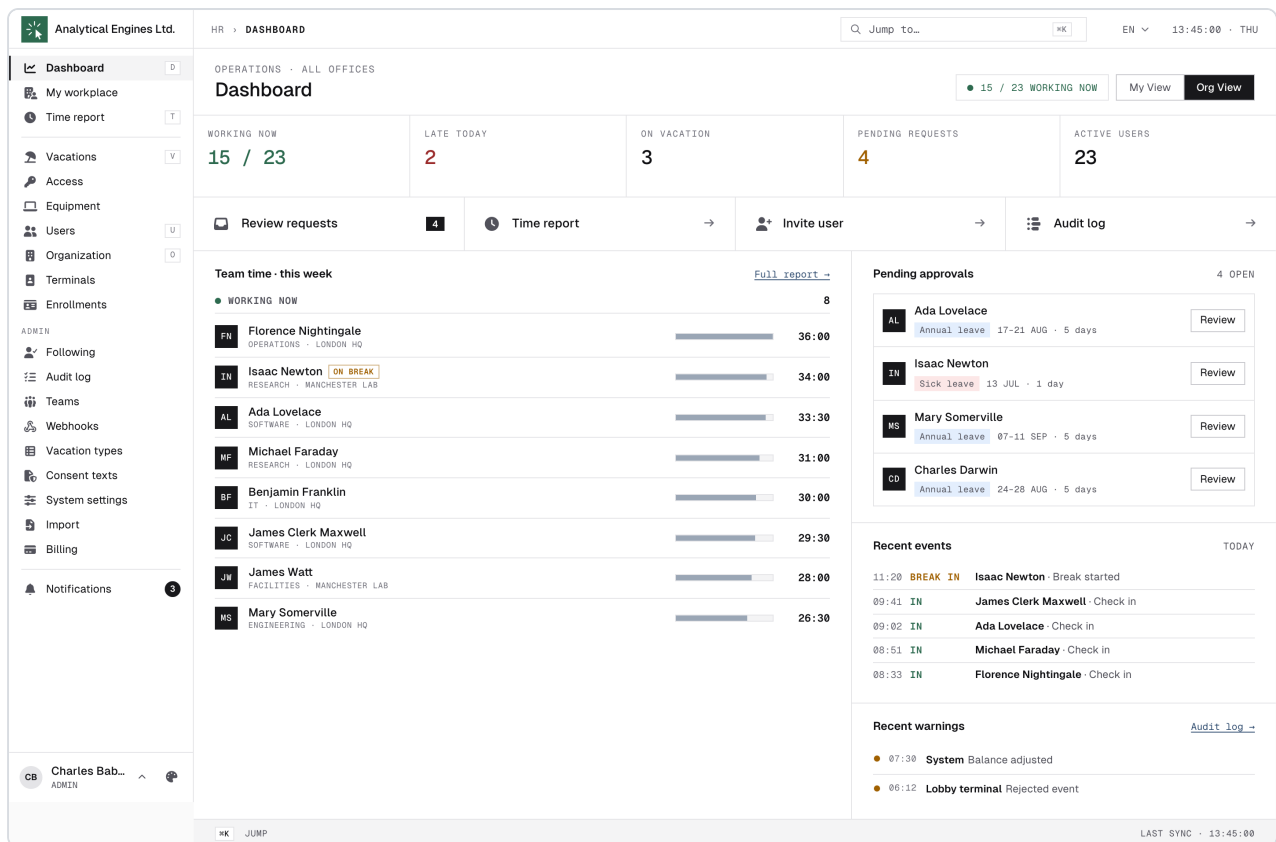


Figure 1 — The Org view — the company at a glance.

2 Users and their lifecycle

Users has two tabs. **List** is the directory: name, department, office, role chips, vacation balance, joined date, status (ACTIVE / BLOCKED / PENDING) and last-seen. Filter by text, position, role, office or status. **Report** is the composition report below — admin-only, because it is built from gender and date of birth.

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Dashboard

My workplace

Time report

Vacations

Access

Equipment

Users

Organization

Terminals

Enrollments

ADMIN

Following

Audit log

Teams

Webhooks

Vacation types

Consent texts

System settings

Import

Billing

Notifications

HR

USERS

Jump to...

EN

13:45:00

THU

Directory

Report

FILTERS

Search name, email, position...

POSITION

All positions

ROLE

All

OFFICE

Select...

STATUS

All

Active

Blocked

9 OF 9 SHOWN

NAME	DEPARTMENT	OFFICE	ROLE	VACATION BALAN...	JOINED	STATUS	LAST SEEN
CB Charles Babbage Founder & Chief Engineer - charles...	Engineering	• London HQ	HR ADMIN	15d	01 Mar 2022	● ACTIVE	1h ago
AL Ada Lovelace Lead Programmer - ada.lovelace@...	Software	• London HQ	TIME MGR	12d 02:00	12 Jun 2023	● ACTIVE	4h ago
FN Florence Nightingale Operations Lead - florence.nightl...	Operations	• London HQ	VACATION MGR	13d 06:00	20 Feb 2023	● ACTIVE	5h ago
BF Benjamin Franklin Systems Administrator - benjamin.f...	IT	• London HQ	ACCESS MGR	11d	03 Sep 2024	● ACTIVE	4h ago
JW James Watt Facilities Manager - james.watt@ex...	Facilities	• Manchester Lab	ASSET MGR	9d 04:00	18 Nov 2024	● ACTIVE	28h ago
MF Michael Faraday Research Scientist - michael.farad...	Research	• London HQ	EMPLOYEE	8d	08 Apr 2024	● ACTIVE	4h ago
IN Isaac Newton Principal Scientist - isaac.newton@...	Research	• Manchester Lab	EMPLOYEE	16d 04:00	30 Oct 2022	● ACTIVE	2h ago
MS Mary Somerville Mathematician - mary.somerville@...	Research	• London HQ	PENDING	0d	07 Jul 2026	● PENDING	—
CD Charles Darwin Naturalist - charles.darwin@examp...	Research	• London HQ	EMPLOYEE	5d	14 Aug 2023	● BLOCKED	2026-06-30

Showing 9 of 9

CB

Charles Bab...

ADMIN

Inviting and editing

The edit page tabs: **Profile**, **Position** (assignment history, work-time overrides), **External IDs**, plus **Access/Equipment** (for access/asset managers) and **Offboard log** after offboarding.

Roles & permissions — six toggles on the profile:

ROLE	WHAT IT GRANTS
HR Admin	Everything: directory, org structure, system settings, billing.
Time manager	Time reports, corrections, approvals.
Shift manager	Shift rosters — the board, the drawer, series and each shift's break. Narrowed to people on a <i>shift</i> schedule; an admin manages every shift regardless.
Vacation manager	Leave approvals and balances.
Access manager	Access governance and the systems catalogue.
Asset manager	Equipment inventory: assign, return, retire.

Team lead is not a toggle — it comes from team membership (the "Leader" mark on a team). You can't edit your own roles or e-mail.

Header actions: **Block/Unblock**, **Reset face** (wipes the terminal faceprint), **Withdraw consent** (GDPR), **Reset password** (e-mails a one-time link and signs out all devices).

EDIT PERSON ID 9902

Ada Lovelace
ada.lovelace@example.com

Block Reset face Withdraw consent Reset password

Profile Position # External IDs Access Equipment

PORTRAIT · 240 × 320 · SHARP
Upload
JPG or PNG, min 240 × 320. No crop tool — uploaded as-is.

FIRST NAME LAST NAME
Ada Lovelace

EMAIL · sign-in identity
ada.lovelace@example.com

PHONE
+44 20 7946 0991

GENDER · optional
Not Specified Male Female

ADDRESS · optional
Street, city, postal code...
0/1000

BIRTHDAY · 40 yrs JOINED
10 Dec 1985 12 Jun 2023

LOCALE
English Українська Français Deutsch Italiano Español

ROLES & PERMISSIONS 1 manager role

☐ **HR Admin**
Full directory, org structure, system settings, billing. Can invite, block, and edit any record.

☒ **Time manager**
Reviews and edits time reports, approves corrections, manages shifts for assigned offices.

☐ **Vacation manager**
Approves or rejects vacation, sick leave, and absence requests; manages balances.

☐ **Access manager**
Manages access governance; approves requests, grants and revokes access, curates the systems catalog.

Cancel Offboard Delete Anonymize Save changes

Figure 3 — The profile — fields, locale, and the five role toggles.

The composition report

Users → Report answers who the company is made of, as of a date you pick: headcount in scope, the split by **gender**, and the distribution across **age** and **tenure** bands with a median under each. Bars are counts, not shares — the gridline legend says what one step is worth.

- Scope follows the office filter in the top bar; **Include offboarded people** adds leavers so you can compare a period with its own history.
- People with no birthday, no start date or no current position are not silently dropped — each gets its own labelled band, so the total always adds up.
- Click a band to list the people behind the number; the search box inside filters that list.
- **Export XLSX** saves the whole report for a board pack.

Offboarding

The **Offboard** wizard walks a departure through five steps: **Start** → **Physical & biometric** → **Digital access** → **Equipment** → **Finalize**. Each step is a checklist — face reset, terminal removal, keycard and building access, per-grant access revocation, per-asset equipment return — and you can't continue until everything applicable is ticked. Finalizing blocks the account and writes the full case to the **Offboard log** tab.

Offboarding does not cut a leaver off mid-shift. The **offboarding report** that goes to every system owner names the exact cutoff in bold — the last working day plus the hours in force that day (a part-timer's own end-of-day wins over the office default) — with a plain "keep this open until X, remove it after" line. Integrations get the same answer automatically: rather than firing at offboard time, the **access.revoke_due** webhook is held until office-local midnight after that last day and released from there. A reinstated leaver cancels their own pending event. An ordinary manual revoke, outside offboarding, still fires immediately.

DELETE VS ANONYMIZE

Delete is a soft removal that keeps history. **Anonymize** irreversibly strips personal data (GDPR erasure) — it has a 10-second countdown for a reason. Both are **offboard-first**: as soon as a person has any position history, the buttons stay disabled ("Offboard this user first") until the wizard has been finalized. Only a never-employed account can be removed straight away.

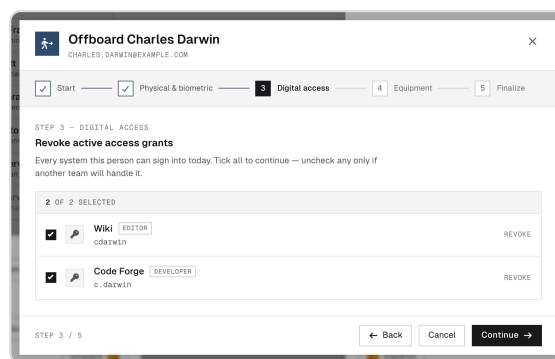


Figure 4 — Offboarding — nothing is forgotten.

3 Organisation — offices, departments, positions, working days

Organization gathers the whole structure in five tabs: **Offices**, **Departments**, **Positions**, **Working days** and **Announcements**.

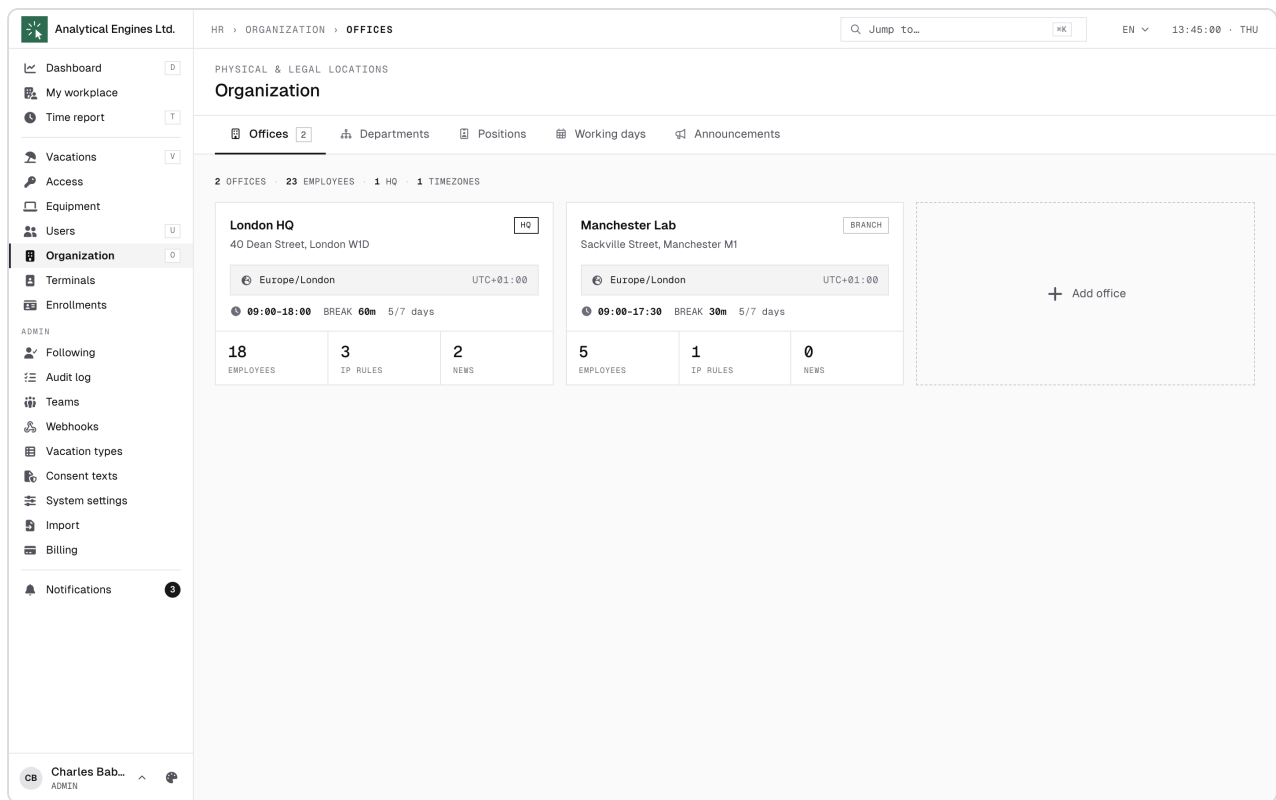


Figure 5 — Offices — one card per site.

Offices

Each office carries the rules its people inherit: **working hours** and break (changes are effective-dated, with history), **work days** (Mon–Sun picker), **timezone**, and the **vacation allowance** — days per year for the first year and subsequent years. Optionally: a map pin with a **geofence** radius, and the office network (below). The pin and radius are stored for the coming mobile app — *today* nothing is decided by distance: whether a punch counts as in-office is settled by the IP address alone. An office may also name a **parent office for working-day inheritance** — it then observes all of that office's holidays and overrides on top of its own (see Working days below), so a country branch can follow the HQ calendar without re-entering every holiday.

The **office network** is what tells a punch it was made in the office: a **DynDNS host** that resolves to the current address, and/or **Fixed IP addresses** for a static address or a whole NAT pool — each rule may carry its own expiry date. This is the list both check-in policies match against (section 6), and it is what decides *in-office* versus *remote* on a phone or browser punch.

Unpunched break is a three-way choice for a day where nobody punched a break at all: **None** leaves it alone; **Deduct the default break** charges the office break once the day is worked to at least 75% of its norm (this can dip the day below the norm); **Deduct from overtime only** also requires no punched break, but only trims the excess worked *past* the norm — the norm itself is never reduced. Any punched break, however short, opts the day out of either mode. It is **None** by default; switching to either deducting mode changes what everyone's totals mean, so announce it before you do. This settles *office-schedule* days only: a shift carries its own break and its own rule on the shift row, and only borrows these as the starting values when a shift manager creates one.

Office **announcements** are not edited on the office card — they live in

Organization → Announcements and each one may target several offices at once (leave the selection empty and it reaches everybody).

Departments & positions

Departments form a drag-to-reorganise tree; a department can't be deleted while it still has children or people. Positions define the **schedule type** — office hours or shifts — and may override the office vacation allowance per office.

Edit office

IDENTITY

OFFICE NAME

London HQ

OFFICE TYPE

HQ

ADDRESS optional

40 Dean Street, London W1D

COUNTRY

GB

LOCALE

English (en)

TIMEZONE

Europe/London

Detect

UTC+01:00 · drives every downstream time calculation

WORKING TIME

WORK FROM

09:00

WORK TO

18:00

BREAK DURATION

60

minutes

UNPUNCHED BREAK

None

Deduct The Default Break

Deduct From Overtime Only

What happens to a day with no punched break. Full can dip below the norm; overtime only never does — it just trims the excess above it.

NET WORK DURATION

08:00 per day · derived

VACATION DAYS / YEAR — FIRST YEAR

21

Country baseline for new employees' first year. Leave blank to not configure (no accrual without a more specific override).

VACATION DAYS / YEAR — SUBSEQUENT YEARS

24

PARENT OFFICE FOR WORKING-DAY INHERITANCE optional

Select...

Inherits holidays and short/work-day overrides from this office. Only offices without their own inheritance are listed (one level, no chains).

HOURS CHANGE TAKES EFFECT FROM

09 Jul 2026

Only used when the work window, the break or the unpunched-break rule changes. Earlier days keep the hours that were in force then; a future date applies automatically on that day.

WORK DAYS

MO

TU

WE

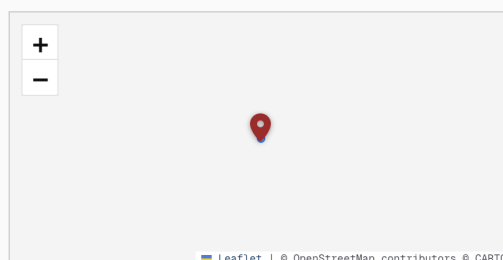
TH

FR

SA

SU

LOCATION



51.5136, -0.1315 · DRAG THE PIN OR CLICK THE MAP

LATITUDE

51,5136

LONGITUDE

-0,1315

DYDNS HOST optional

office.example.io

Resolves the office network for IP-rule matching

FIXED IP ADDRESSES optional

Requests from these IPs resolve to this office for check-in. Leave the end date empty for an open-ended rule.

000.000.000.000 Fixed IP

Cancel Delete Save changes

Figure 6 — An office — hours, allowance, work days, parent office for inheritance, geofence.

Working days

The calendar of exceptions: holidays, short days and working-day overrides, scoped to one office, several offices, or global. These drive everything — vacation previews skip them, the terminal and reports respect them. An office that names a parent (above) also inherits the parent's exceptions; its own entry on a date always wins over an inherited one, which wins over a global one.

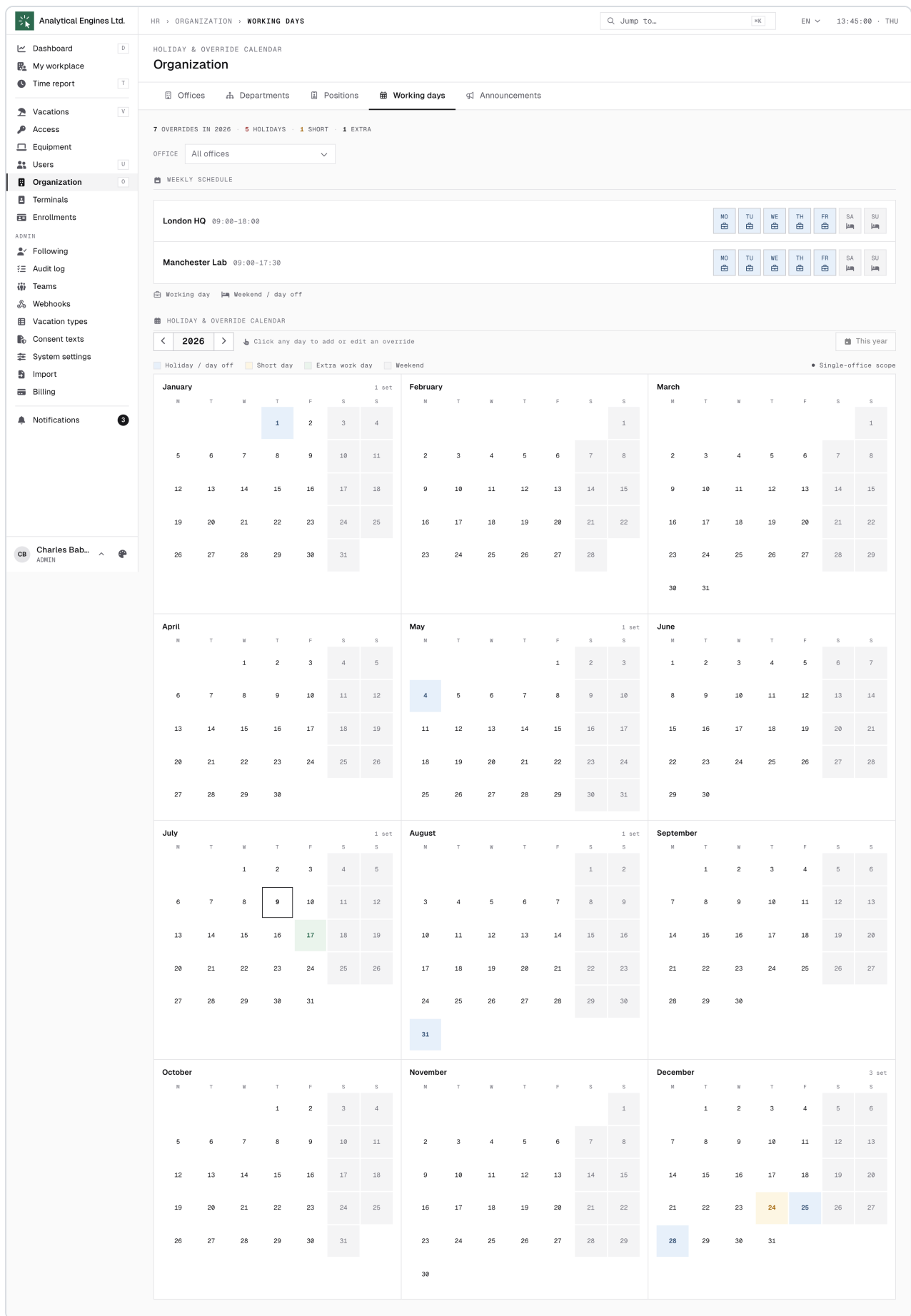


Figure 7 — Working days — holidays and overrides, per office or global.

TEAMS

Teams (Admin section) is where team leads are made: create a team, add members, tick **Leader** on at least one. Leaders approve their team's leave (TL stage) and see team-scoped views. A team with zero leaders gets a warning in the list.

4 Vacation types — your leave policy

Vacation types define what employees can request and how it behaves:

- **Type** — name, short code, calendar colour, and an **icon** (a FontAwesome class, e.g. **fa-sharp fa-solid fa-umbrella-beach**) that then stands next to the type everywhere it is named — request form, list, calendar legend, day drawer. Leave it empty for a plain colour dot.
- **Balance** — paid/unpaid; effect *deduct* / *accrue* / *none*; optionally pause accrual while away (typical for unpaid leave).
- **Approval** — the TL / VM toggles compose the flow: both, one, or auto-approved.
- **Limits** — max consecutive working days and minimum notice; each limit is either *soft* (over-limit requests are flagged for manual approval and auto-reject on a deadline) or *hard* (blocked at submit).
- **Restrict auto approve/reject** — takes this type out of the timeout crons: requests of it are never auto-approved when a stage times out, and a flagged one is never auto-rejected on the deadline. Someone has to decide. Use it for the types where silence must not become a decision (unpaid, long-term, parental).

Changing a balance-affecting rule offers a **reconcile preview** so existing vacations are recalculated deliberately, not silently.

1 · EXISTING TYPE
Edit vacation type

TYPE
NAME
Annual leave
CODE
ANN
COLOUR
ICON

fa-sharp fa-solid fa-umbrella-beach
FontAwesome class – e.g. fa-sharp fa-solid fa-umbrella-beach. Leave empty for a plain colour dot.

BALANCE
☒ Paid leave
BALANCE EFFECT
Deducts from balance
☐ Pauses balance accrual while on leave

APPROVAL

☒ Team lead approves
☒ Vacation manager confirms
☐ Restrict auto approve/reject

TL → VM → ROUTED TEAM LEAD → VACATION MANAGER

LIMITS
MAX CONSECUTIVE WORKING DAYS
14
☐ Block requests over this limit
REQUEST AT LEAST N DAYS IN ADVANCE
3
☐ Block requests with too little notice

Delete Cancel Save

Figure 8 — A vacation type — balance effect, approval flow, limits.

5 GDPR consent texts

Consent texts manages the biometric-consent documents employees sign at terminal enrolment, versioned per country and language. The lifecycle is strict: a **draft** is editable → **Publish** makes it active (and immutable) → **Deprecate** retires it. To change wording, create the next version. Each version links to its **signatures** — who accepted, when, where.

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My workplace

Time report

Vacations

Access

Equipment

Users

Organization

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Enrollments

ADMIN

Following

Audit log

Teams

Webhooks

Vacation types

Consent texts

System settings

Import

Billing

Notifications

HR > ADMIN > GDPR CONSENT TEXTS

Q Jump to...

EN

13:45:00 · THU

ADMIN · CONSENT TEXTS · 8 TEXTS · 6 ACTIVE

GDPR consent texts

+ New text

VERSION	LOCALE	COUNTRY	STATUS	ACTIVATED
v1.1	EN	GB	DRAFT	—
v1.0	EN	GB	ACTIVE	01 Mar 2026
v1.0	UK	UA	ACTIVE	01 Mar 2026
v1.0	FR	FR	ACTIVE	01 Mar 2026
v1.0	DE	DE	ACTIVE	01 Mar 2026
v1.0	IT	IT	ACTIVE	01 Mar 2026
v1.0	ES	ES	ACTIVE	01 Mar 2026
v0.9	EN	GB	DEPRECATED	01 Jun 2025

CB

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ADMIN

Figure 9 — Consent versions — draft, active, deprecated.

6 System settings

System settings holds the instance-wide switches, each with its own save state and a "last changed by" audit line:

- **Security** — enable/disable passkey sign-in org-wide; require passkeys for admins; and the **JWT signing secret** with a **Rotate** action — rotating signs everyone out within about an hour (your incident lever).
- **Single sign-on** — Google Workspace / Microsoft Entra status, read-only here (configured by the operator in the instance config).
- **Data retention** — how many years of personal data to keep (GDPR cleanup honours it).
- **Vacations** — the stage timers (hours) for flagged-request handling per TL/VM stage.
- **Time tracking** — where a phone, the browser extension, or the HR.Click dashboard itself may clock in from. Three independent policies, same three values (see below). The face terminal ignores them entirely: it always records an in-office punch. The same group holds **missed-punch requests** (see below).

POLICY VALUE	WHAT IT MEANS
Office network only	A punch is accepted only from an IP address registered to one of your offices (section 3). Anything else is refused. This is the default for phone check-in .
Anywhere	Accepted from any address. A punch made outside a known office network is recorded as <i>remote</i> , not in-office — it still counts as worked time.
Disabled	That channel cannot clock in at all. This is the default for browser check-in and site check-in ; with browser check-in off, the extension keeps showing the day read-only and the time strip disappears from everyone's new-tab page. With site check-in off, the dashboard shows no check-in buttons at all.

Both are marked **High impact**: changing either asks for confirmation, spelling out the consequence, and writes a "last changed by" line.

Missed-punch requests

Whether an employee may ask for **one** forgotten punch to be added, or a wrong one replaced, instead of coming to a manager for every missed check-out. Nothing they file counts until a time manager approves it in **Approvals** — the queue is the gate, these settings only bound how much reaches it.

SETTING	WHAT IT DOES
Missed-punch requests	The feature switch. On by default. Off removes the One punch tab entirely, leaving people the whole-day self-report.
How far back a missed punch may be dated	Default 24 hours — a <i>floor</i> , not a ceiling: an office whose shift runs longer than half of it gets twice its own shift length instead, so a 20-hour rotation reaches back 40 hours without you setting anything. Going below a day mostly sends these requests to a manager, because someone who forgets to check out at 18:00 rarely notices before the next morning.
Missed-punch requests per person each month	Default 5 ; 0 means no limit. Bounds how much review this can generate. A withdrawn request does not count — nobody reviewed it. Independently, at most three requests may await a decision at once.

WHY A WINDOW AT ALL

What stops a person inventing a month of attendance is not the window — it is that a request is *one* punch, that it is only accepted where it fits the day's existing punches (a check-in cannot follow a check-in), that it needs a written reason, and that a manager approves it. The window exists so the feature stays about forgetfulness rather than rewriting history; anything older stays a manager's job, and the employee's date picker simply will not offer it.

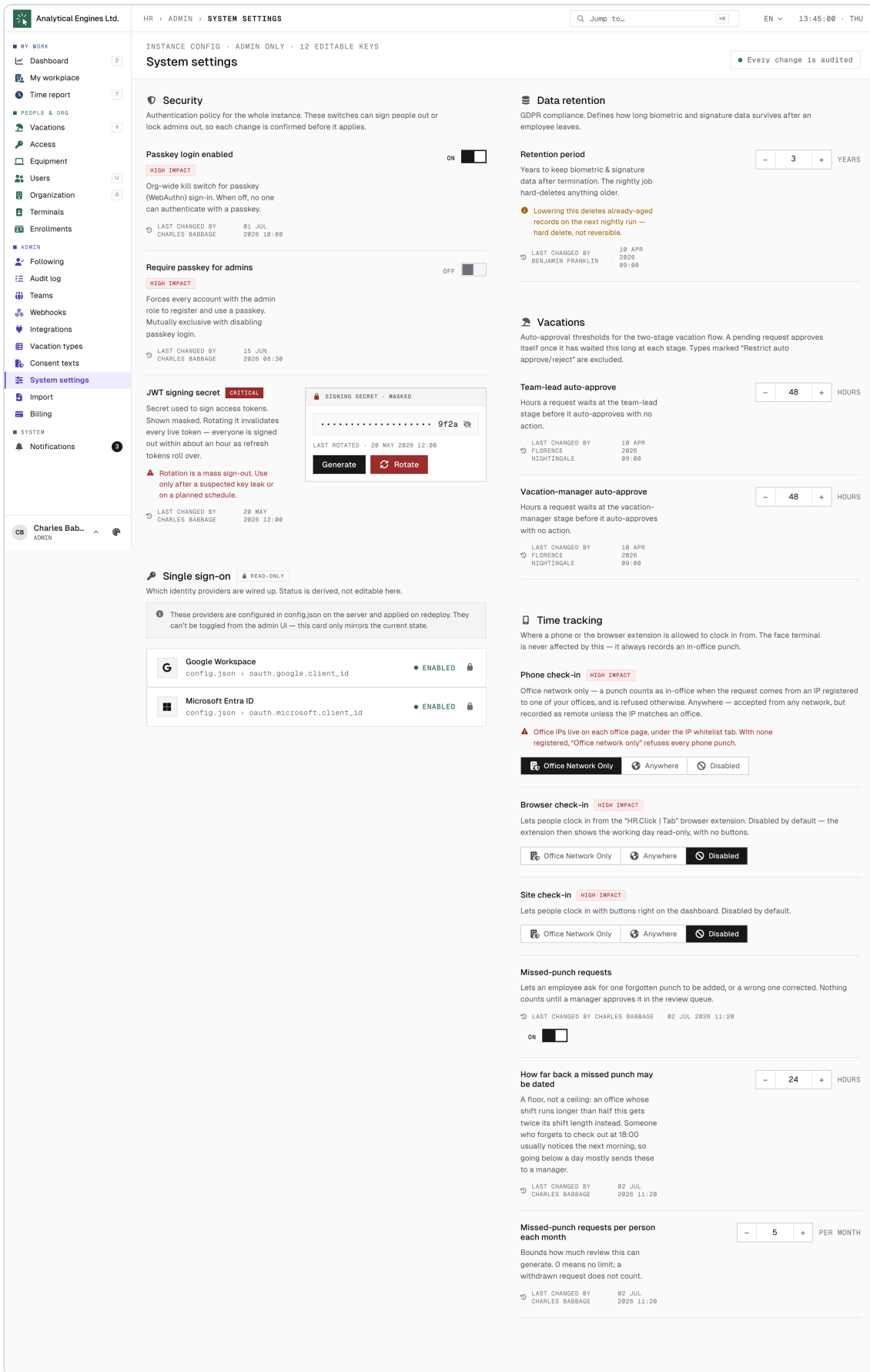


Figure 10 — System settings — security, SSO, retention, vacation timers, check-in policies, missed-punch rules.

7 Webhooks

Webhooks integrates HR.Click with the outside world, in both directions:

- **Outbound** — endpoints that receive HR.Click events (check-ins, vacations, access, shifts...). Each has an HTTPS URL, an HMAC **secret** (shown once; rotate any time), a checkbox tree of subscribed events, a **Send test** button, and a **Recent deliveries** table with per-delivery status and retry. Failing endpoints are badged in the list.
- **Inbound** — registered external systems (turnstiles, access control, HRIS) that push signed events into HR.Click via their own slug URL.

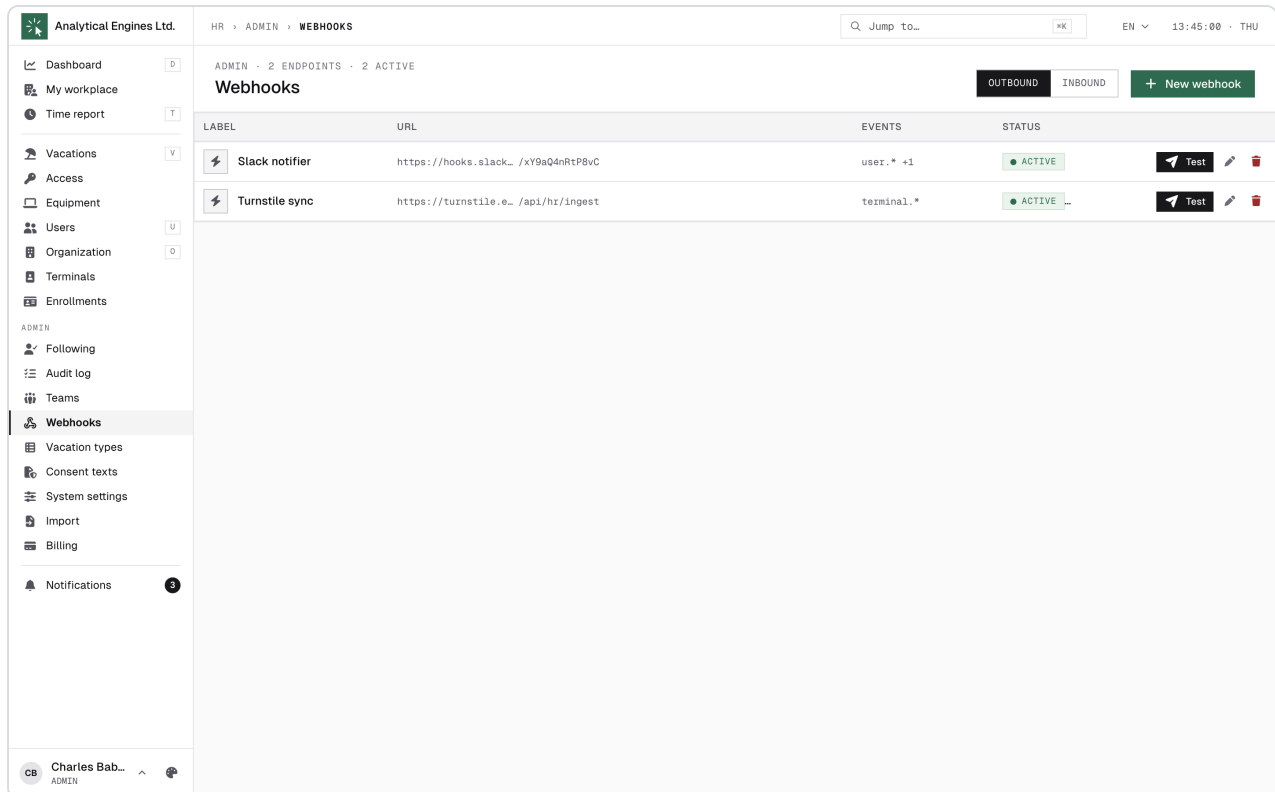


Figure 11 — Outbound webhooks — endpoints, subscriptions, delivery health.

8 The audit log

Every meaningful action lands in the append-only **Audit log** — sign-ins, edits, approvals, terminal events, privacy actions — with actor, target, result, request id, IP and metadata. Filter by **action** (wildcards % and _ work, e.g. auth.%), severity, result, actor and time; preset chips cover the common hunts. **Export CSV / JSON** is rate-limited to one export per minute. Retention: 24 months, UTC.

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HR

ADMIN

AUDIT LOG

Jump to...

HK

EN ▾

13:45:00 - THU

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My workplace

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Access

Equipment

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Export JSON

QUICK FILTERS

Thermal / Fan

Thermal mode

Auth attempts

Privacy / GDPR

Webhooks

Terminal lifecycle

Reset

Apply

ACTION

SEVERITY

RESULT

ACTOR

FROM

e.g. auth.login.%

Any

Info

Notice

Warning

Critical

Any

Success

Failure

All users

▾

Select date

📅

00:00

🕒

wildcards % and _ supported

TO

Select date

📅

00:00

🕒

WHEN	SEVERITY	ACTION	ACTOR	TARGET	RESULT
1h ago 09 Jul 2020 12:40	INFO	auth.login.success	Charles Babbage USER	Charles Babbage user #0001	SUCCESS
1h ago 09 Jul 2020 12:18	NOTICE	user.updated	Charles Babbage USER	Ada Lovelace user #0002	SUCCESS
1h ago 09 Jul 2020 11:52	INFO	vacation.approved_vm	Florence Nightingale USER	Isaac Newton · 1d vacation #00	SUCCESS
2h ago 09 Jul 2020 11:05	NOTICE	terminal.paired	Lobby terminal TERMINAL	term-002 terminal #2	SUCCESS
3h ago 09 Jul 2020 10:34	INFO	access.granted	Benjamin Franklin USER	Ada Lovelace user #0002	SUCCESS
3h ago 09 Jul 2020 09:48	WARNING	vacation.balance_adjusted	System SYSTEM	Charles Darwin user #0007	SUCCESS
4h ago 09 Jul 2020 09:20	INFO	consent.signed	Michael Faraday USER	Privacy notice v1 consent_text #1	SUCCESS
5h ago 09 Jul 2020 08:41	NOTICE	user.blocked	Charles Babbage USER	Charles Darwin user #0007	SUCCESS
5h ago 09 Jul 2020 08:12	NOTICE	auth.login.failure	unknown@example.com USER	-	FAILURE
6h ago 09 Jul 2020 07:30	INFO	webhook.delivered	System SYSTEM	Slack notifier webhook #1	SUCCESS

Charles Bab...

ADMIN

APPEND-ONLY · UTC · RETENTION 24M

Figure 12 — The audit log — filterable, append-only, exportable.

9 Import, billing, and the rest

Import

Import onboards a whole company from a spreadsheet: upload (a template is downloadable) → review — the wizard walks **Overview** → **Leave types** → **Positions** → **Teams** → **People**, letting you map/merge/skip each item — → commit with a summary. The file can be dropped straight onto the upload area. On the **People** step each person carries a department picker: nobody lands in a default department by accident, and leaving it untouched keeps whatever the file said. The commit is gated by your seat quota: you can't import more people than the plan allows.

Billing

Billing shows your subscription (plan, status, renewal date and amount) and the two quotas that gate growth: **user seats** and **terminals**. When you change plan, the price breakdown also prints the all-in monthly cost averaged per seat per day — the figure to quote when someone asks what HR.Click costs per employee. Payment methods and invoices live in the external billing portal — **Manage billing** opens it.

Following

Following is a personal convenience for admins and time managers: subscribe to specific colleagues' check-in / break / clock-out events and get pinged when they happen — useful for reception or duty rosters. Pause, edit or unfollow any time.

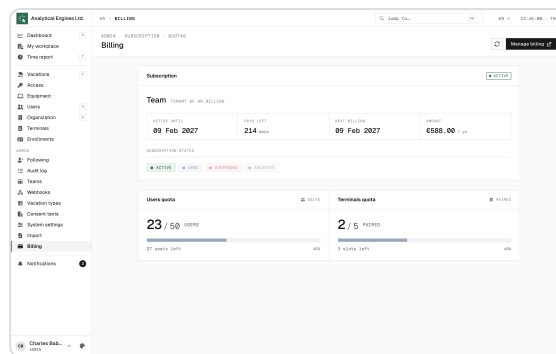


Figure 13 — Billing — plan and quotas; the portal handles payment.

10 Where a check-in came from

A punch made from a phone or the browser extension stores the address it arrived from, and a background sweep resolves that into a country, region and city — plus a VPN/proxy verdict where the provider supplies one. The location shows in the **day drawer** under the event: a flag, the place, the address itself in the tooltip, and a **VPN** or **Tor** tag when the connection is not what it seems. Nothing shows until the lookup has landed.

- **Only some punches carry it.** Terminal, imported, webhook and self-reported rows stay empty on purpose — a kiosk reports its own office uplink and a back-fill reports the operator's, neither of which is the employee's location.
- **Only you see it.** The block is admin-only, deliberately narrower than the rest of the record: a time manager reads attendance, not where a person physically was. The data is left out of the payload entirely for everyone else, rather than merely hidden on screen.
- **The lookup never blocks a punch.** It runs on a schedule, reuses an answer it already holds for the same address, and stops rather than burning rows when the provider fails — so an expired key or an exhausted quota resolves itself on a later run.
- The provider is wired up by your operator in the instance configuration, not in **System settings**. With none configured, punches simply carry no location and everything else works unchanged.

TREAT IT AS WHAT IT IS

This is location history about your staff. Anonymizing a person clears their stored addresses and resolved places while keeping the punches, and a GDPR data export (Art. 15) includes both the locations and any notes the person attached to their punches — because that is exactly what those articles cover. Do not re-purpose the block for anything you have not told your people about.

HR.Click — Administrator Guide · v1.2 · September 2026. Product screens shown with sample data; names of persons are fictitious examples.