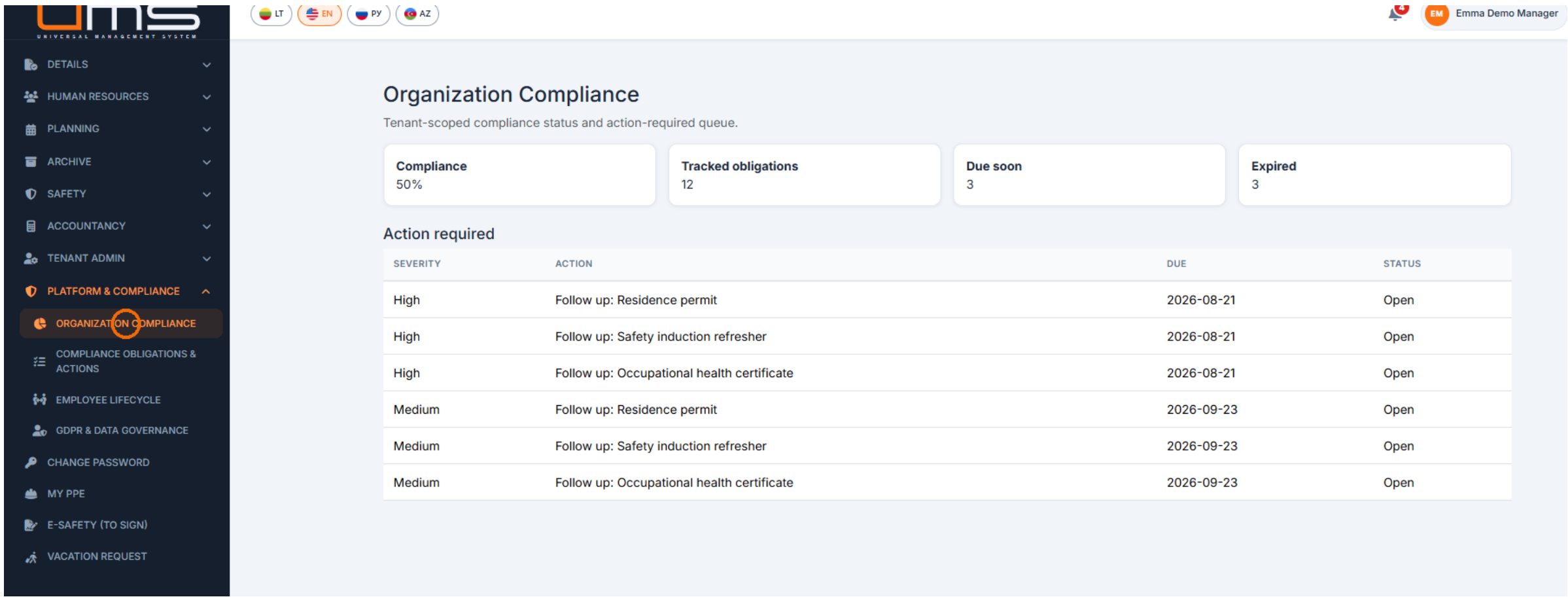
Organization Compliance

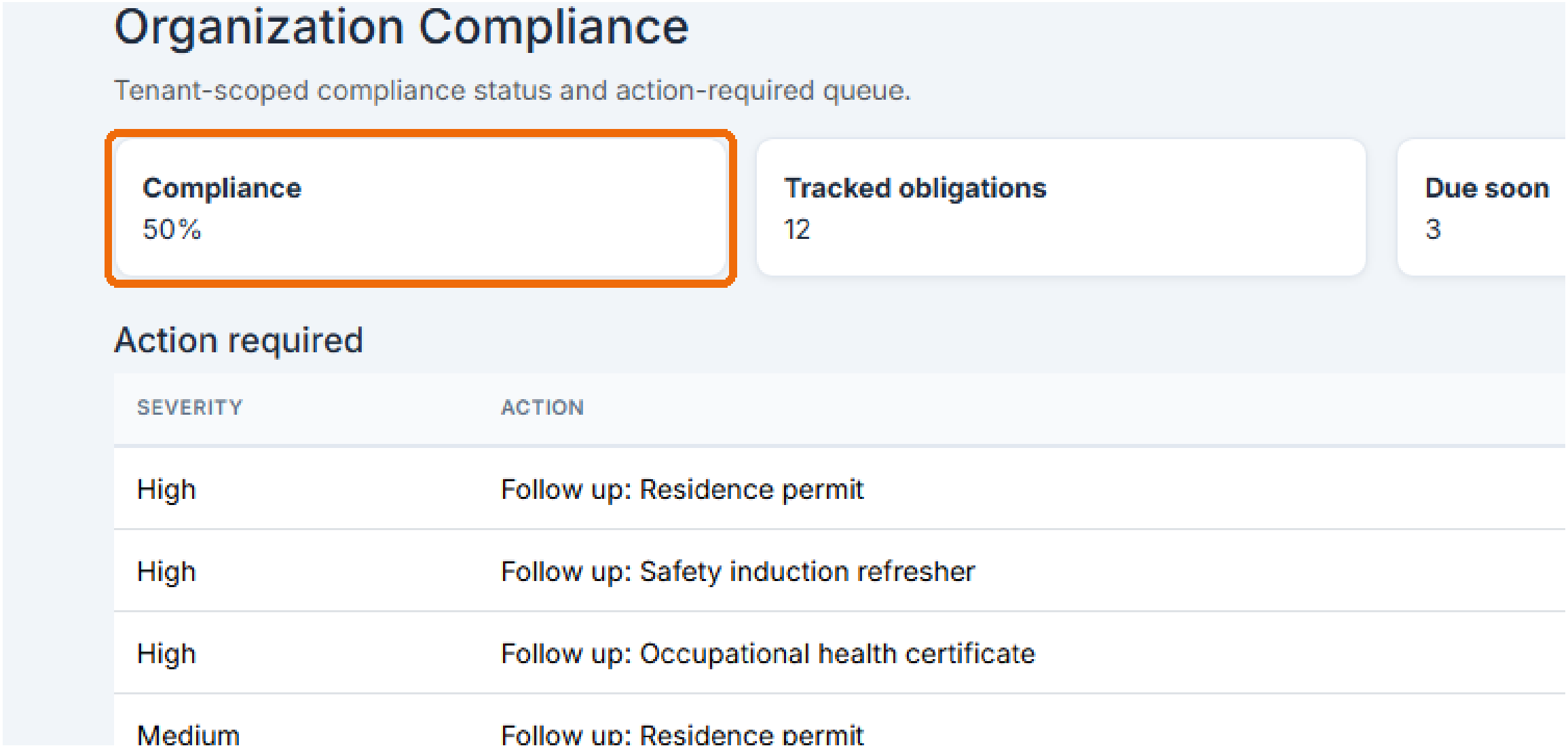
Open Organization Compliance



Open Platform & Compliance > Organization Compliance in the side menu. The page is read-only: it summarises the compliance obligations tracked for the current organization (tenant) and lists the follow-up actions that are still open. Data from other organizations is never shown. Use it as the starting point for a weekly compliance check.

Organization Compliance

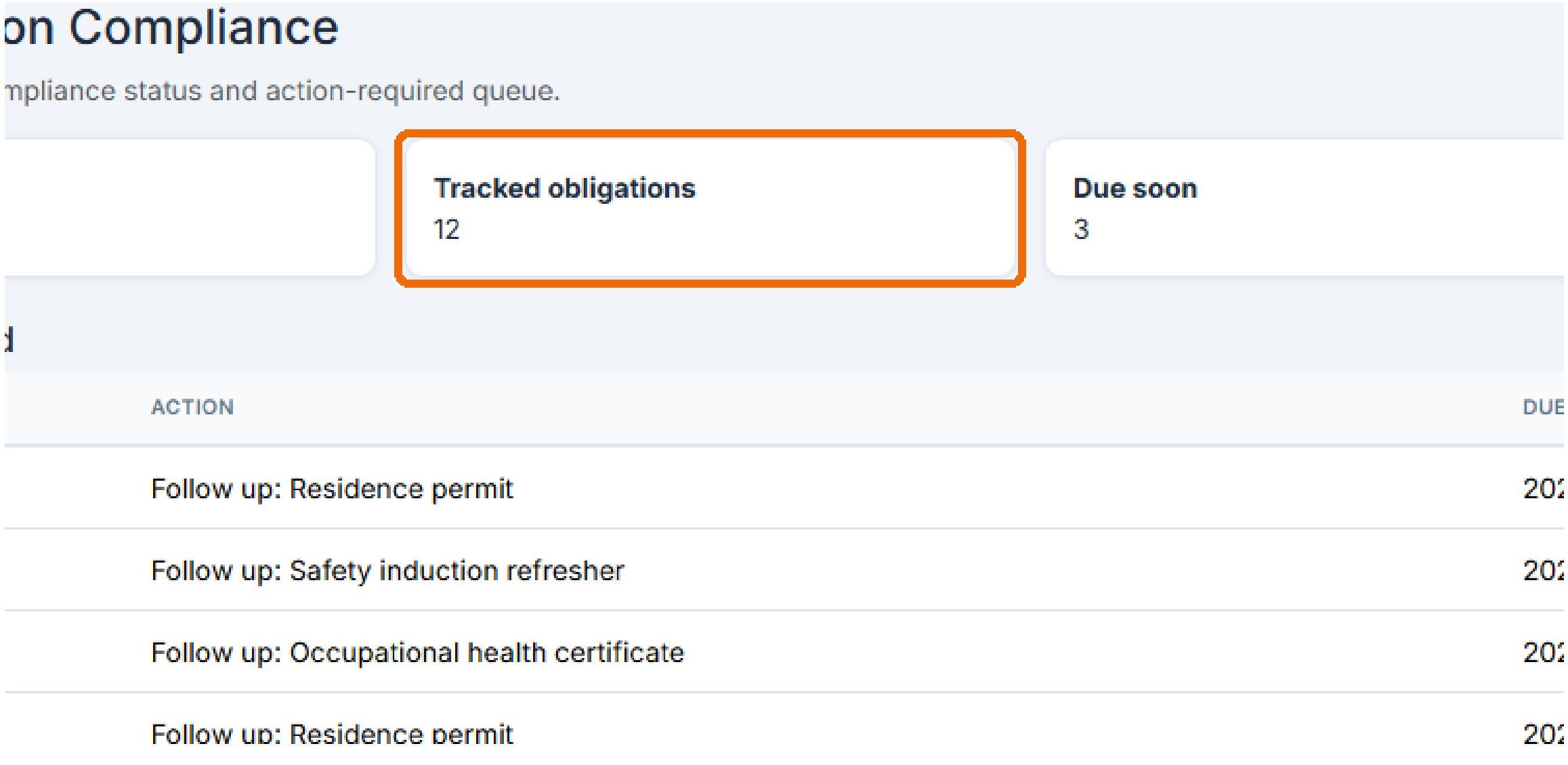
Compliance score



The Compliance card is the overall score. It is the number of tracked obligations that are Valid, Completed or Waived divided by all tracked obligations, as a percentage. In the demo, 6 of 12 obligations are in order, so the score is 50%. When nothing is tracked yet, the score shows 100%.

Organization Compliance

Tracked obligations



Tracked obligations is the total number of compliance records for the organization: residence permits, safety induction refreshers, occupational health certificates and similar items. Each one belongs to an employee and may have an expiry date. The full list is on the Compliance Obligations & Actions page.

Organization Compliance

Due soon and expired

Due soon
3

Expired
3

	DUE	STATUS
	2026-08-21	Open
	2026-08-21	Open
	2026-08-21	Open
	2026-09-23	Open

Due soon is the number of obligations that expire within their warning period, so there is still time to renew them. Expired is the number of obligations whose expiry date has already passed. Both kinds lower the compliance score and create a follow-up in the Action required list below.

Organization Compliance

Action required

50% | 12 | 3 | 3

Action required

SEVERITY	ACTION	DUE
High	Follow up: Residence permit	2026-08-21
High	Follow up: Safety induction refresher	2026-08-21
High	Follow up: Occupational health certificate	2026-08-21
Medium	Follow up: Residence permit	2026-09-23
Medium	Follow up: Safety induction refresher	2026-09-23
Medium	Follow up: Occupational health certificate	2026-09-23

Action required is the queue of open follow-ups for the organization. SEVERITY shows how urgent each item is: expired obligations get the highest severity, items that are only due soon a lower one. The list is sorted with the most critical items first and then by due date, and shows up to 100 open items.

Organization Compliance

What has to be done

12 3 3

ACTION	DUE	STATUS
Follow up: Residence permit	2026-08-21	Open
Follow up: Safety induction refresher	2026-08-21	Open
Follow up: Occupational health certificate	2026-08-21	Open
Follow up: Residence permit	2026-09-23	Open
Follow up: Safety induction refresher	2026-09-23	Open
Follow up: Occupational health certificate	2026-09-23	Open

ACTION describes what needs to happen, for example Follow up: Residence permit or Follow up: Occupational health certificate. The text comes from the obligation that triggered the action, so each line can be traced back to a specific record on the Compliance Obligations & Actions page.

Organization Compliance

Due date and status

3

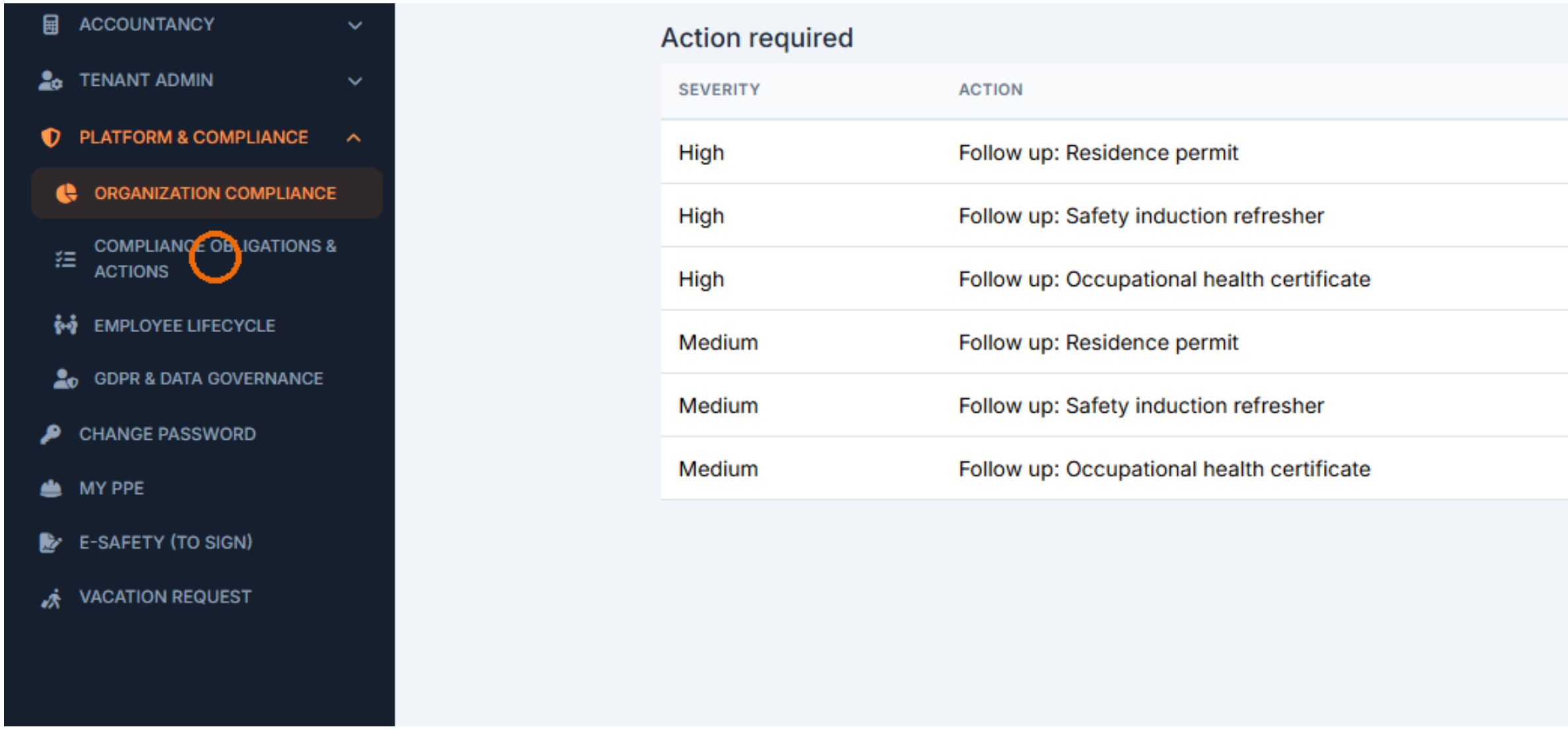
3

DUE	STATUS
2026-08-21	Open
2026-08-21	Open
2026-08-21	Open
2026-09-23	Open
2026-09-23	Open
2026-09-23	Open

DUE is the expiry date of the underlying obligation (shown as - when there is none). STATUS is Open for every item listed here; once an item is resolved, or the obligation becomes valid again after an expiry check, it disappears from this list. When nothing is open, the page shows No open compliance actions.

Organization Compliance

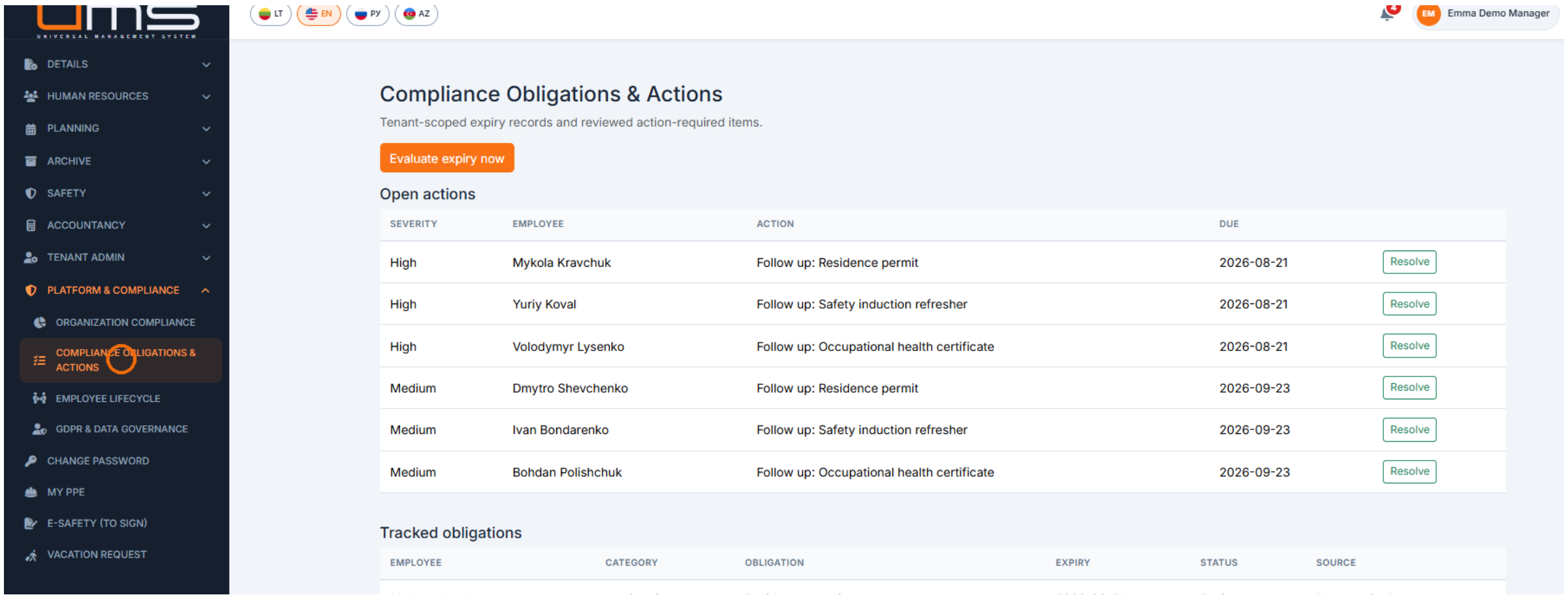
Where to act



This dashboard is for monitoring only. To see which employee each action belongs to, to resolve actions and to review every tracked obligation, open Platform & Compliance > Compliance Obligations & Actions. That page is explained in the next lesson.

Compliance Obligations & Actions

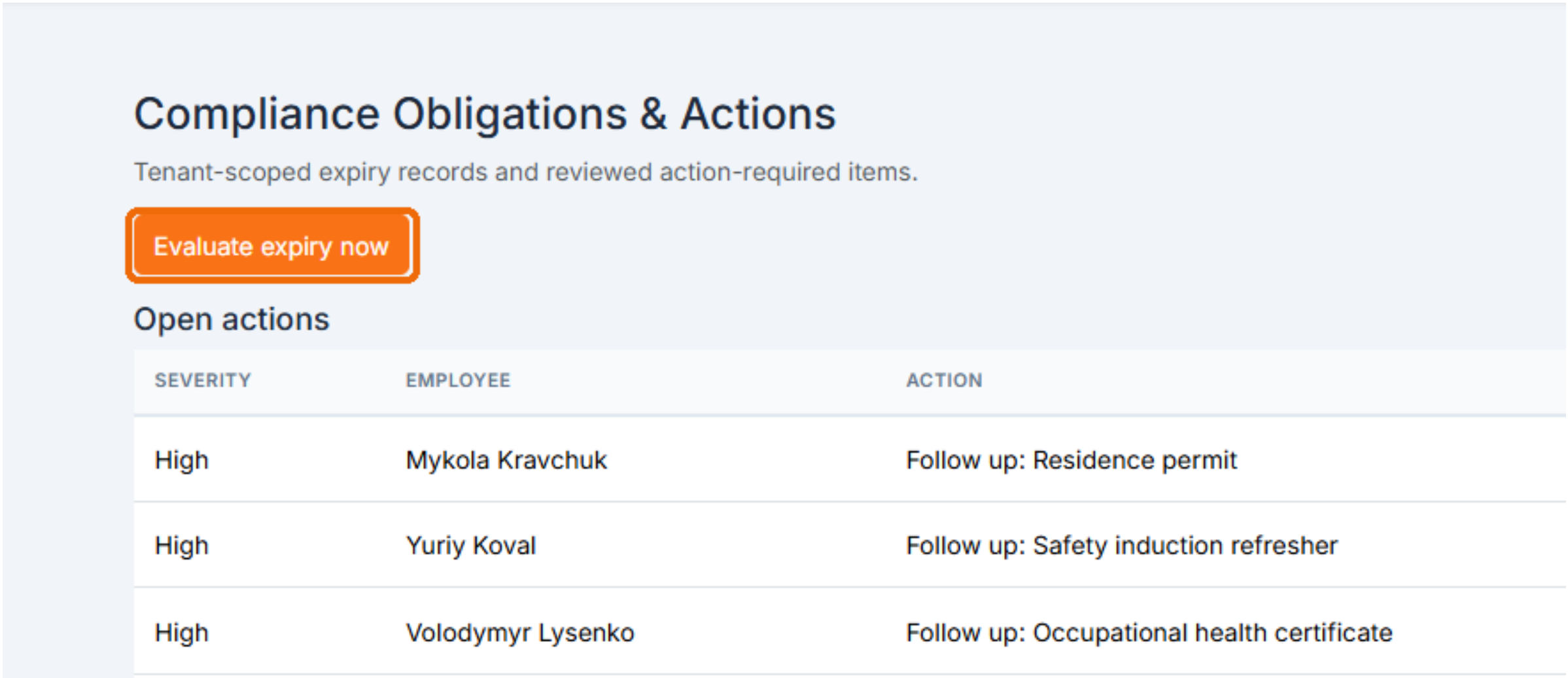
Open the obligations page



Open Platform & Compliance > Compliance Obligations & Actions. The page has three parts: the Evaluate expiry now button, the Open actions table and the Tracked obligations table. Everything shown belongs to the current organization (tenant) only. A confirmation or warning message appears at the top after each action.

Compliance Obligations & Actions

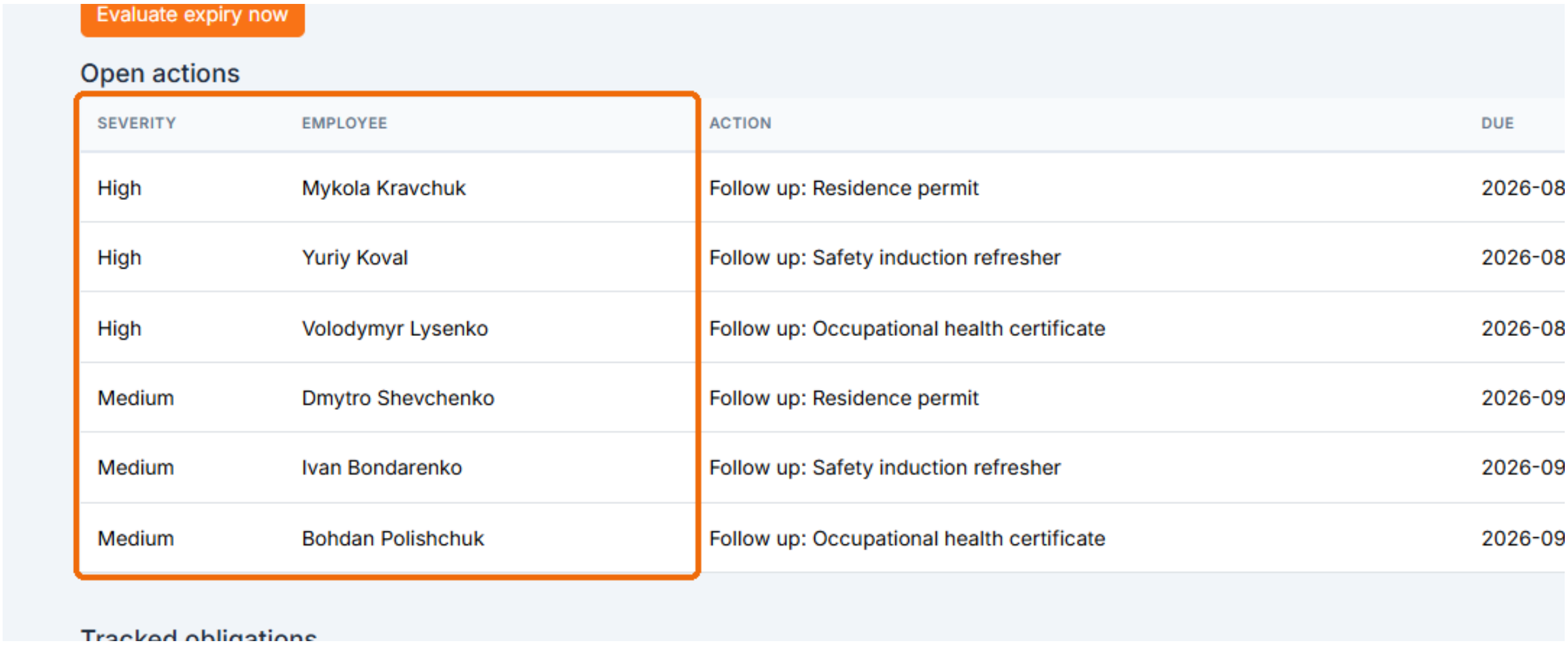
Evaluate expiry now



Evaluate expiry now recalculates the status of every obligation from its expiry date and warning period. Each Expired or DueSoon obligation gets an open action if it does not have one yet, and actions whose obligation is valid again are closed automatically. A message then confirms how many changes were recorded. If the button is disabled, the unified-expiry-engine pilot flag is not yet enabled for your organization.

Compliance Obligations & Actions

Severity and employee



Open actions lists every follow-up that is still open. SEVERITY shows how urgent it is: expired obligations are the most severe, items that are only due soon come next. EMPLOYEE is the person the obligation belongs to, so you know whose permit, certificate or training must be renewed.

Compliance Obligations & Actions

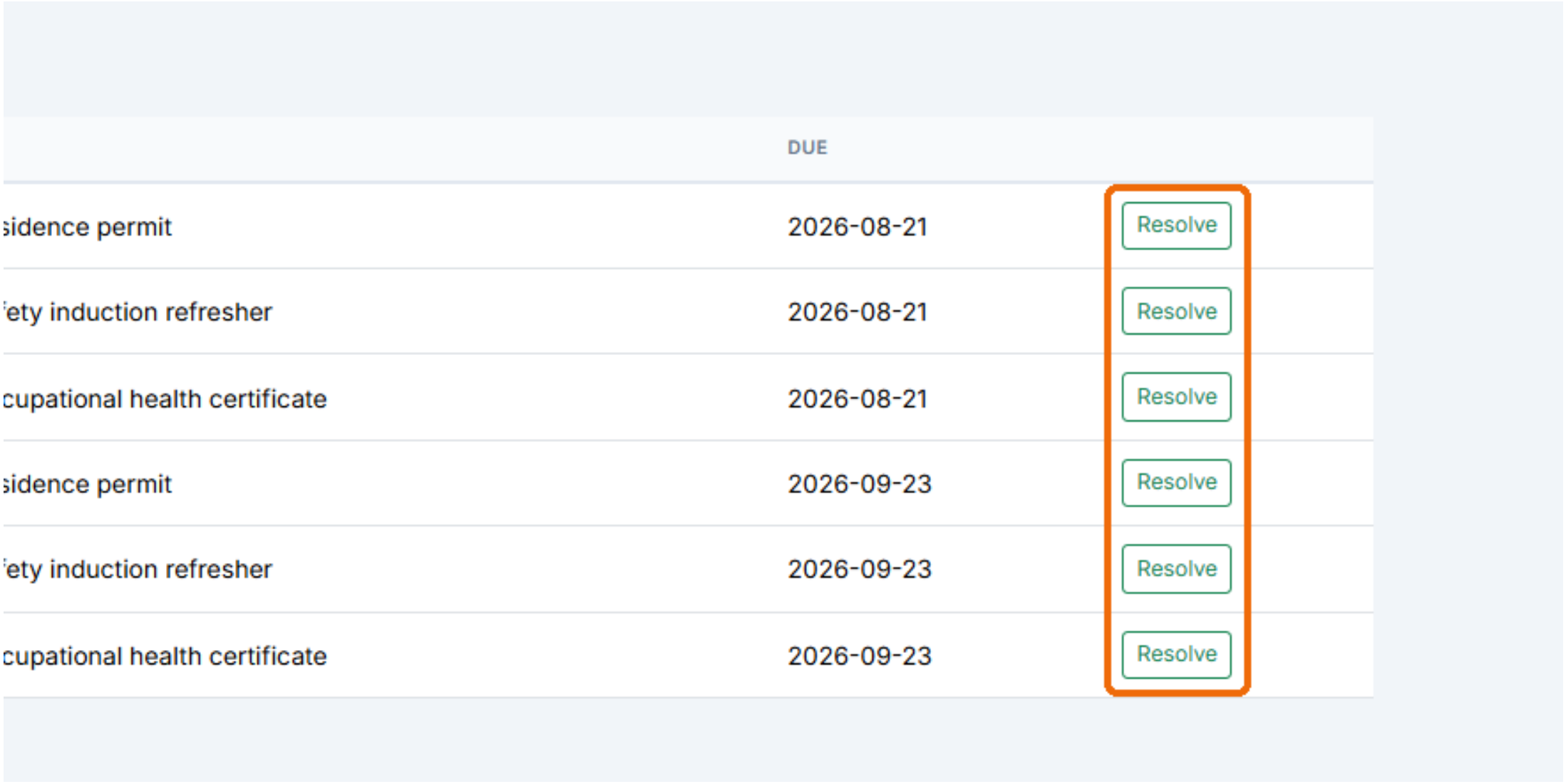
Action and due date

ACTION	DUE	
Follow up: Residence permit	2026-08-21	Resolve
Follow up: Safety induction refresher	2026-08-21	Resolve
Follow up: Occupational health certificate	2026-08-21	Resolve
Follow up: Residence permit	2026-09-23	Resolve
Follow up: Safety induction refresher	2026-09-23	Resolve
Follow up: Occupational health certificate	2026-09-23	Resolve

ACTION is the follow-up to perform, for example Follow up: Safety induction refresher. DUE is the expiry date of the obligation that created the action (shown as - when there is none). Items are ordered by due date, so the oldest expiries are at the top.

Compliance Obligations & Actions

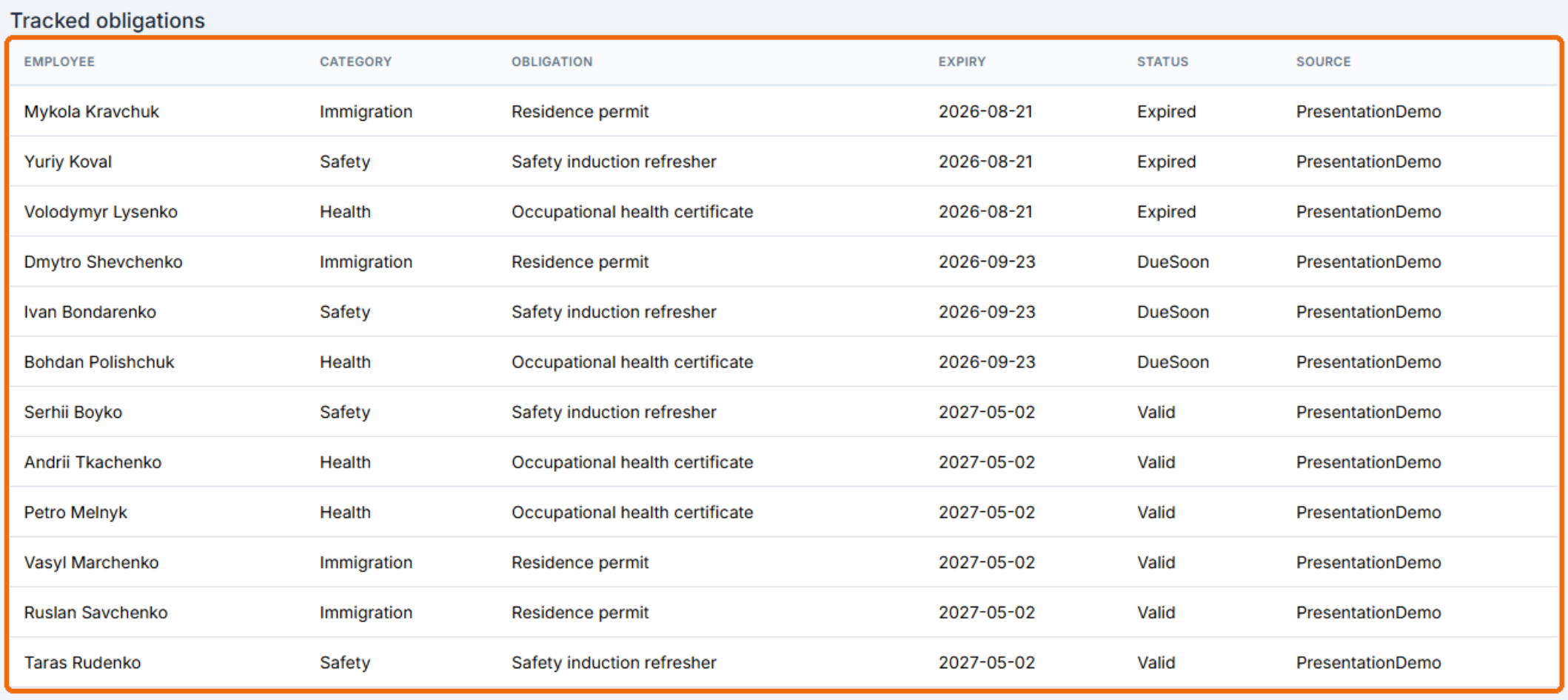
Resolve an action



After the permit has been renewed, the training refreshed or the certificate uploaded, click Resolve on that row. The action is closed, removed from the open list and written to the compliance audit log with your user name; the message The action was resolved and audited confirms it. Resolve buttons are disabled until the organization-action-queue pilot flag is enabled.

Compliance Obligations & Actions

Tracked obligations



Tracked obligations

EMPLOYEE	CATEGORY	OBLIGATION	EXPIRY	STATUS	SOURCE
Mykola Kravchuk	Immigration	Residence permit	2026-08-21	Expired	PresentationDemo
Yuriy Koval	Safety	Safety induction refresher	2026-08-21	Expired	PresentationDemo
Volodymyr Lysenko	Health	Occupational health certificate	2026-08-21	Expired	PresentationDemo
Dmytro Shevchenko	Immigration	Residence permit	2026-09-23	DueSoon	PresentationDemo
Ivan Bondarenko	Safety	Safety induction refresher	2026-09-23	DueSoon	PresentationDemo
Bohdan Polishchuk	Health	Occupational health certificate	2026-09-23	DueSoon	PresentationDemo
Serhii Boyko	Safety	Safety induction refresher	2027-05-02	Valid	PresentationDemo
Andrii Tkachenko	Health	Occupational health certificate	2027-05-02	Valid	PresentationDemo
Petro Melnyk	Health	Occupational health certificate	2027-05-02	Valid	PresentationDemo
Vasyl Marchenko	Immigration	Residence permit	2027-05-02	Valid	PresentationDemo
Ruslan Savchenko	Immigration	Residence permit	2027-05-02	Valid	PresentationDemo
Taras Rudenko	Safety	Safety induction refresher	2027-05-02	Valid	PresentationDemo

Scroll down to Tracked obligations. This is the complete list of compliance records for the organization, one row per employee and obligation. It includes valid records as well as expired ones, so you can see the full picture behind the compliance score. When nothing has been imported or created yet, the table says so.

Compliance Obligations & Actions

Employee, category, obligation

Tracked obligations

EMPLOYEE	CATEGORY	OBLIGATION	EXPIRY	STATUS
Mykola Kravchuk	Immigration	Residence permit	2026-08-21	Expired
Yuriy Koval	Safety	Safety induction refresher	2026-08-21	Expired
Volodymyr Lysenko	Health	Occupational health certificate	2026-08-21	Expired
Dmytro Shevchenko	Immigration	Residence permit	2026-09-23	DueSoon
Ivan Bondarenko	Safety	Safety induction refresher	2026-09-23	DueSoon
Bohdan Polishchuk	Health	Occupational health certificate	2026-09-23	DueSoon
Serhii Boyko	Safety	Safety induction refresher	2027-05-02	Valid
Andrii Tkachenko	Health	Occupational health certificate	2027-05-02	Valid
Petro Melnyk	Health	Occupational health certificate	2027-05-02	Valid
Vasyl Marchenko	Immigration	Residence permit	2027-05-02	Valid

EMPLOYEE names the person. CATEGORY groups obligations by area, for example Immigration for residence permits, Safety for induction refreshers and Health for occupational health certificates. OBLIGATION is the specific document or training that has to stay valid.

Compliance Obligations & Actions

Expiry and status

	EXPIRY	STATUS	SOURCE
ıit	2026-08-21	Expired	PresentationDemo
ı refresher	2026-08-21	Expired	PresentationDemo
ealth certificate	2026-08-21	Expired	PresentationDemo
ıit	2026-09-23	DueSoon	PresentationDemo
ı refresher	2026-09-23	DueSoon	PresentationDemo
ealth certificate	2026-09-23	DueSoon	PresentationDemo
ı refresher	2027-05-02	Valid	PresentationDemo
ealth certificate	2027-05-02	Valid	PresentationDemo

EXPIRY is the date the obligation runs out, or No expiry. STATUS is calculated from it: Expired when the date has passed, DueSoon when it falls inside the warning period, otherwise Valid. Completed and Waived records count as in order, and records without a date show NoExpiry. Statuses are refreshed each time the expiry check runs.

Compliance Obligations & Actions

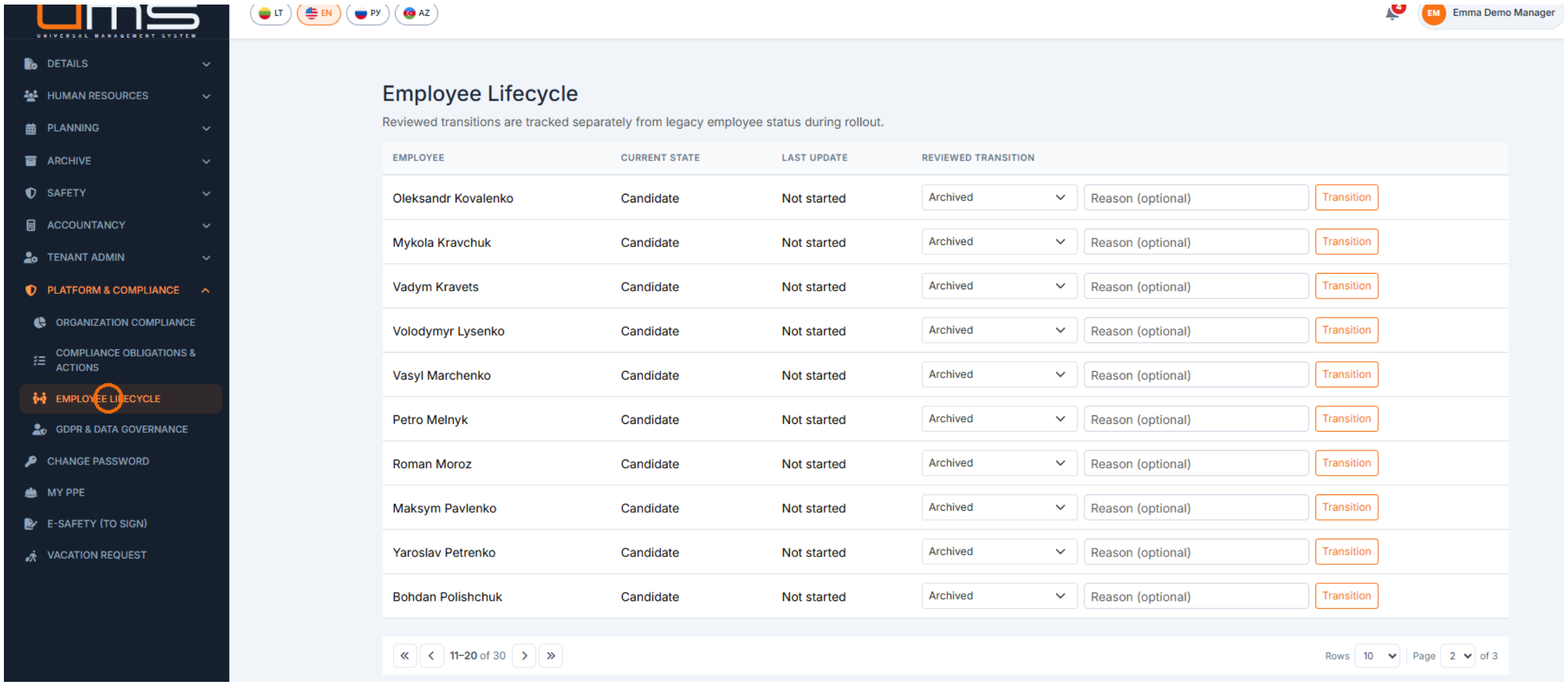
Where the record came from

	EXPIRY	STATUS	SOURCE
ıit	2026-08-21	Expired	PresentationDemo
ı refresher	2026-08-21	Expired	PresentationDemo
ealth certificate	2026-08-21	Expired	PresentationDemo
ıit	2026-09-23	DueSoon	PresentationDemo
ı refresher	2026-09-23	DueSoon	PresentationDemo
ealth certificate	2026-09-23	DueSoon	PresentationDemo
ı refresher	2027-05-02	Valid	PresentationDemo

SOURCE tells you how the obligation entered the system, so you can trace it back when a date looks wrong. In the presentation tenant every record was created as PresentationDemo sample data. Correct the original record and run Evaluate expiry now again to update the status and the open actions.

Employee Lifecycle

Open Employee Lifecycle



Open Platform & Compliance > Employee Lifecycle. Every employee of the current organization has one row. The lifecycle state is kept separately from the older employee status during the rollout, so moving someone here does not change their status on the other HR pages. If transitions are disabled, a note says the page is read-only until the employee-lifecycle pilot flag is enabled.

Employee Lifecycle

Employee and current state

Employee Lifecycle

Reviewed transitions are tracked separately from legacy employee status during rollout.

EMPLOYEE	CURRENT STATE	LAST UPDATE	REVIEWED TRANSITION	
Oleksandr Kovalenko	Candidate	Not started	Archived	Reason (optional)
Mykola Kravchuk	Candidate	Not started	Archived	Reason (optional)
Vadym Kravets	Candidate	Not started	Archived	Reason (optional)
Volodymyr Lysenko	Candidate	Not started	Archived	Reason (optional)
Vasyl Marchenko	Candidate	Not started	Archived	Reason (optional)
Petro Melnyk	Candidate	Not started	Archived	Reason (optional)
Roman Moroz	Candidate	Not started	Archived	Reason (optional)
Maksym Pavlenko	Candidate	Not started	Archived	Reason (optional)

EMPLOYEE is the person's name and CURRENT STATE is their lifecycle stage. There are six states: Candidate, Onboarding, Active, Suspended, Offboarding and Archived. People who have never been moved start as Candidate. In the demo everybody is still a Candidate.

Employee Lifecycle

Last update

separately from legacy employee status during rollout.

CURRENT STATE	LAST UPDATE	REVIEWED TRANSITION		
Candidate	Not started	Archived	Reason (optional)	Transition
Candidate	Not started	Archived	Reason (optional)	Transition
Candidate	Not started	Archived	Reason (optional)	Transition
Candidate	Not started	Archived	Reason (optional)	Transition
Candidate	Not started	Archived	Reason (optional)	Transition
Candidate	Not started	Archived	Reason (optional)	Transition
Candidate	Not started	Archived	Reason (optional)	Transition
Candidate	Not started	Archived	Reason (optional)	Transition

LAST UPDATE shows the date and time (UTC) of the most recent transition for that person. Not started means no transition has been recorded yet, so the person is still in the starting Candidate state. Use this column to spot people who have been stuck in onboarding or offboarding for too long.

Employee Lifecycle

Choose the next state

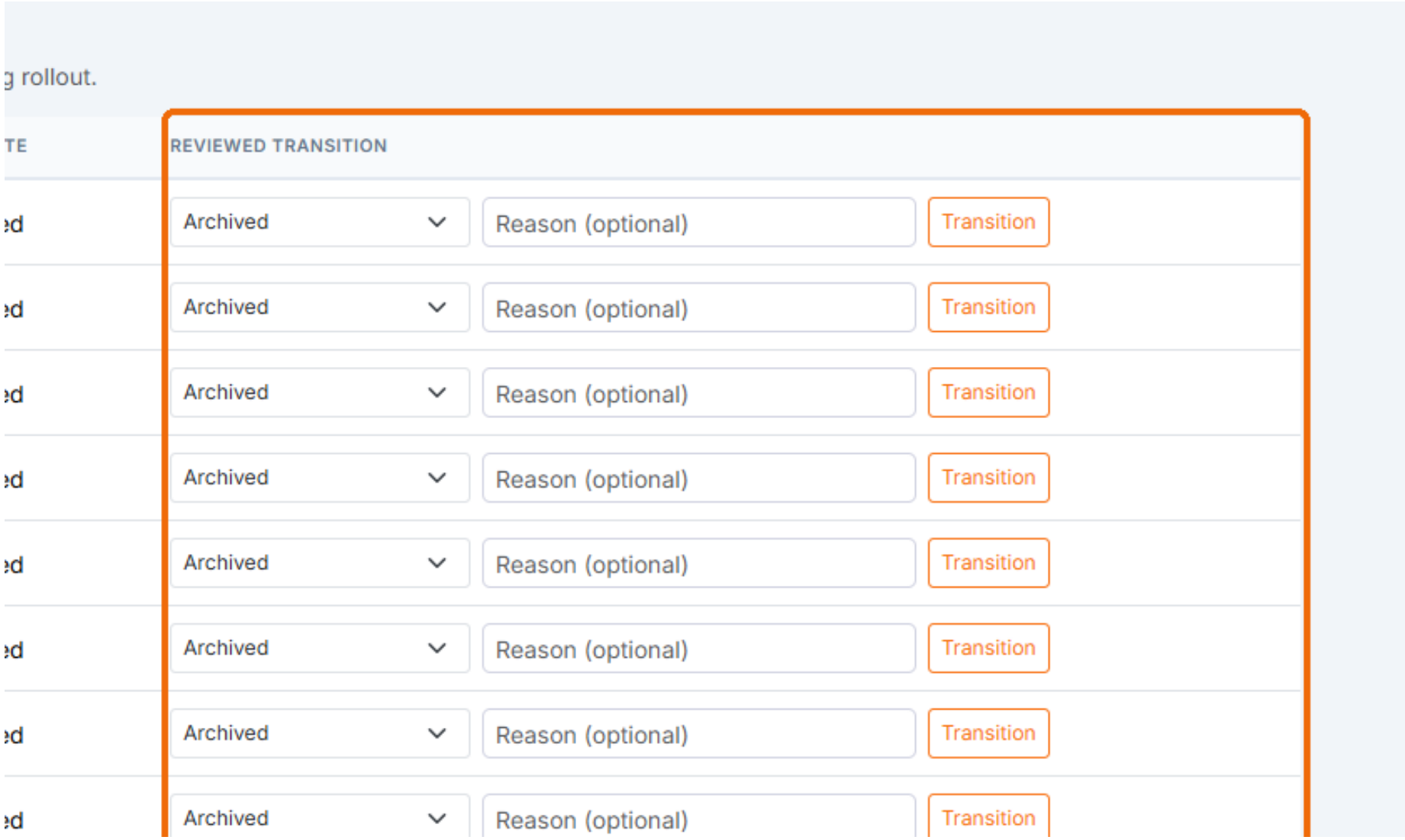
ee status during rollout.

LAST UPDATE	REVIEWED TRANSITION		
Not started	Archived	Reason (optional)	Transition
Not started	Archived Onboarding	Reason (optional)	Transition
Not started	Archived	Reason (optional)	Transition
Not started	Archived	Reason (optional)	Transition
Not started	Archived	Reason (optional)	Transition
Not started	Archived	Reason (optional)	Transition

Open the drop-down in the REVIEWED TRANSITION column and choose where the person should move. A Candidate can go to Onboarding or be Archived. The list never offers a move that is not allowed from the current state, so stages cannot be skipped by mistake.

Employee Lifecycle

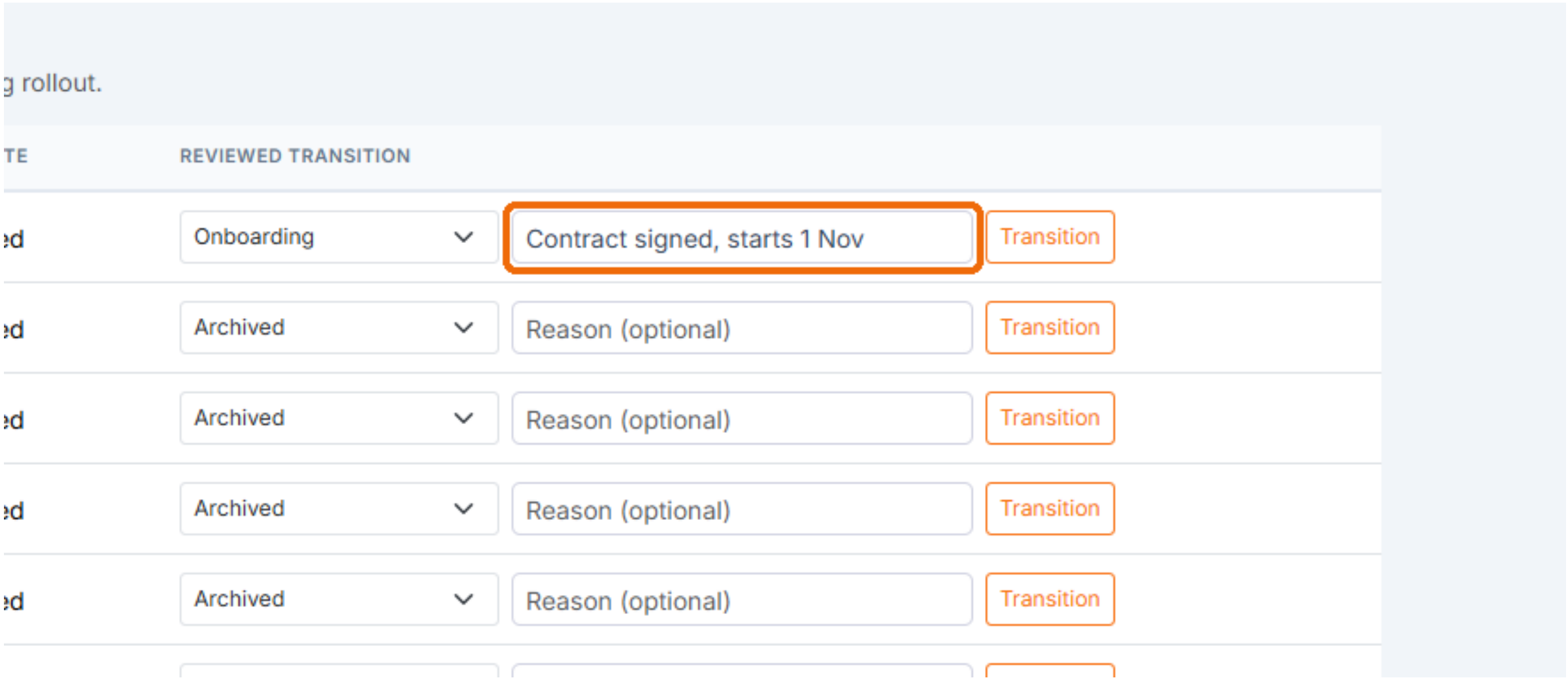
The allowed path



The allowed moves are: Candidate to Onboarding or Archived; Onboarding to Active, or back to Candidate; Active to Suspended or Offboarding; Suspended back to Active or on to Offboarding; Offboarding to Archived, or back to Active if the person stays. Archived is the final state, so those rows show No further transition.

Employee Lifecycle

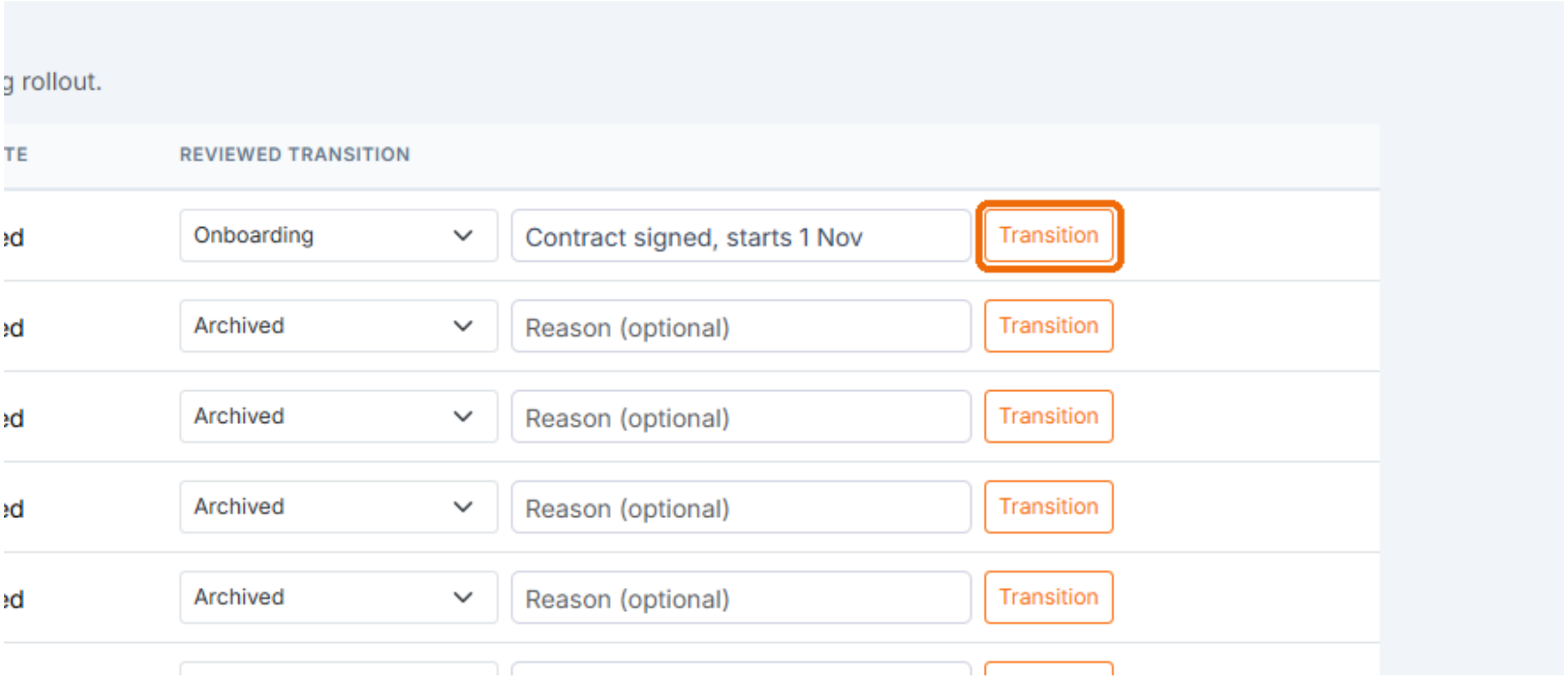
Add a reason



Type a short reason in the Reason (optional) field, for example Contract signed, starts 1 Nov. It can be up to 500 characters long. The reason is stored together with the old state, the new state, the date and the user who made the change, so the history explains why each move happened.

Employee Lifecycle

Save with Transition



Click Transition on the same row. The new state is saved, LAST UPDATE is refreshed and the change is written to the compliance audit log; the message Lifecycle moved to Onboarding and was audited confirms it. If someone else changed the same person after you opened the page, nothing is saved and you are asked to refresh and try again.

Employee Lifecycle

Browse all employees

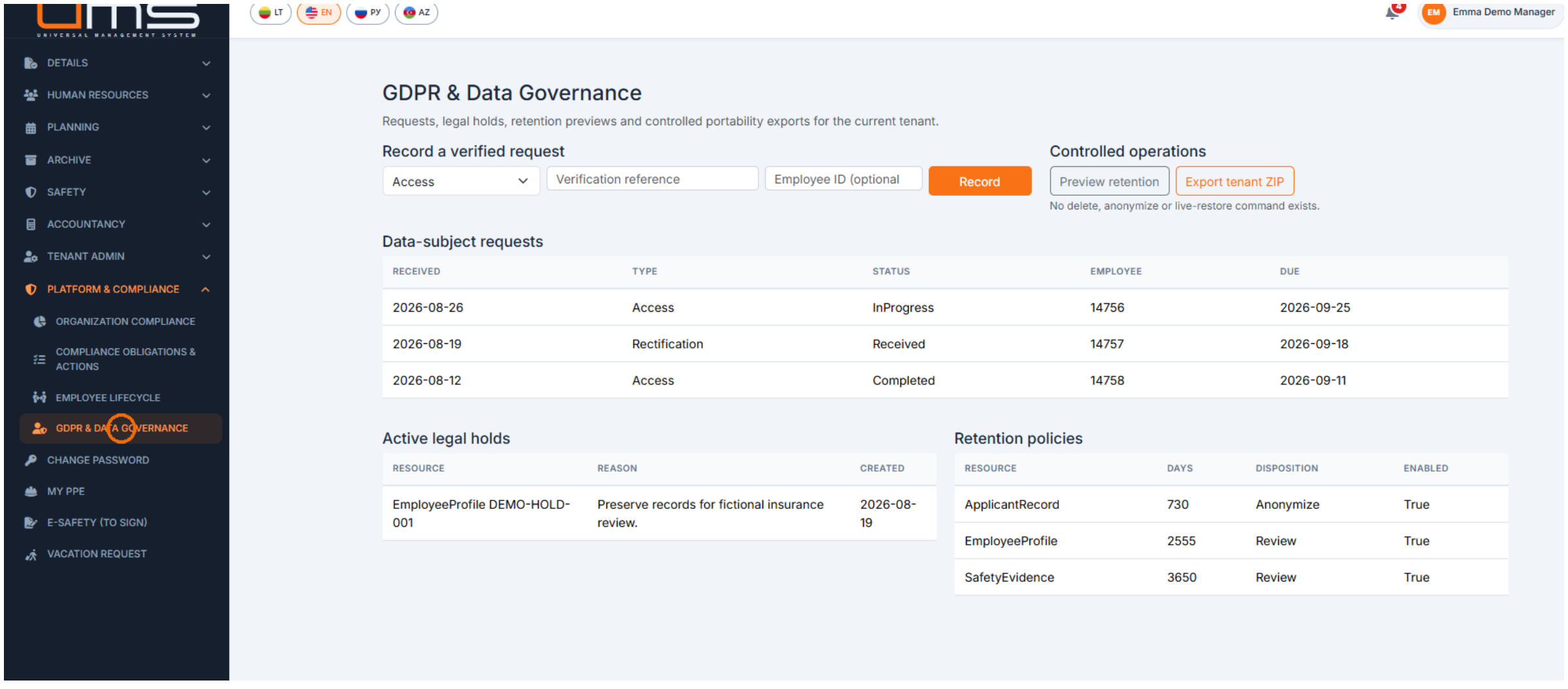
Vasyl Marchenko	Candidate	Not started	Archived	Reason (optional)	Transition
Petro Melnyk	Candidate	Not started	Archived	Reason (optional)	Transition
Roman Moroz	Candidate	Not started	Archived	Reason (optional)	Transition
Maksym Pavlenko	Candidate	Not started	Archived	Reason (optional)	Transition
Yaroslav Petrenko	Candidate	Not started	Archived	Reason (optional)	Transition
Bohdan Polishchuk	Candidate	Not started	Archived	Reason (optional)	Transition

« ‹ 11–20 of 30 › » Rows 10 Page 2 of 3

The list is split into pages. Use the arrow buttons to go to the first, previous, next or last page; the counter shows which rows you are viewing, for example 11-20 of 30. On the right, Rows sets how many employees are shown per page and Page jumps straight to a page.

GDPR & Data Governance

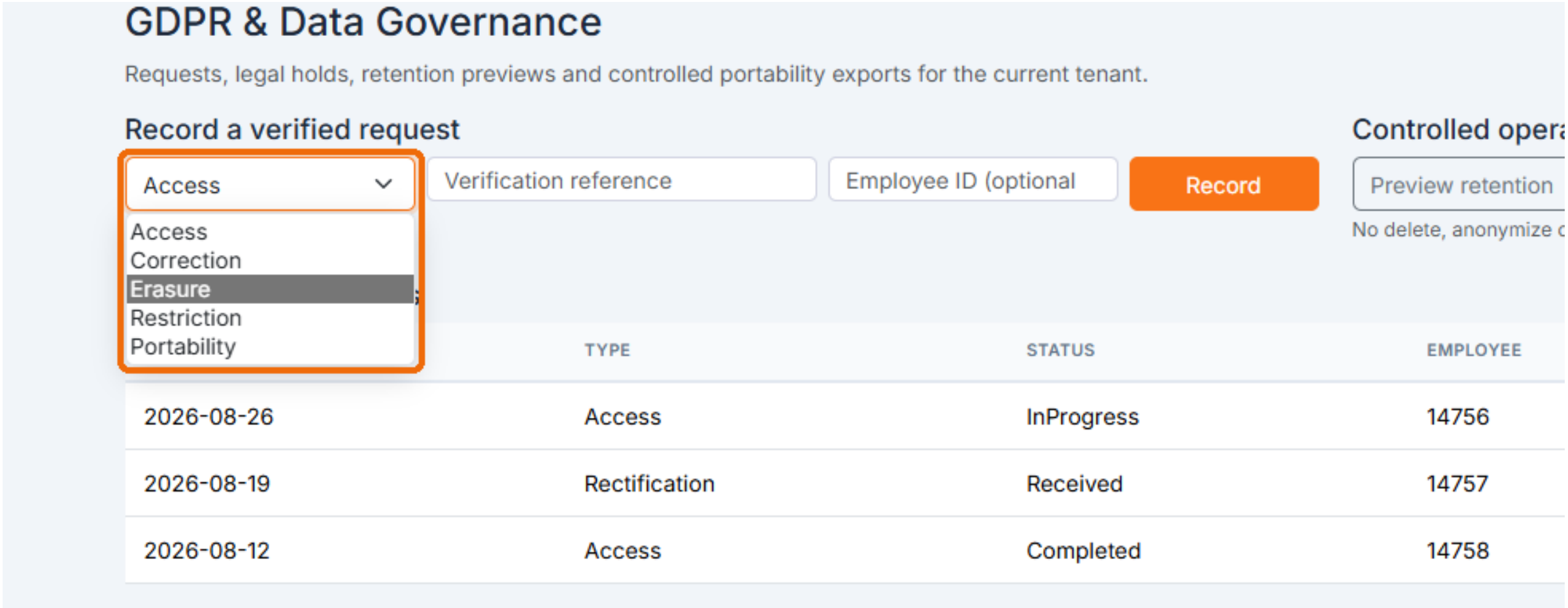
Open GDPR & Data Governance



Open Platform & Compliance > GDPR & Data Governance. At the top you record verified data-subject requests and run the controlled operations. Below are the list of requests, the active legal holds and the retention policies. Everything on the page belongs to the current organization (tenant) only.

GDPR & Data Governance

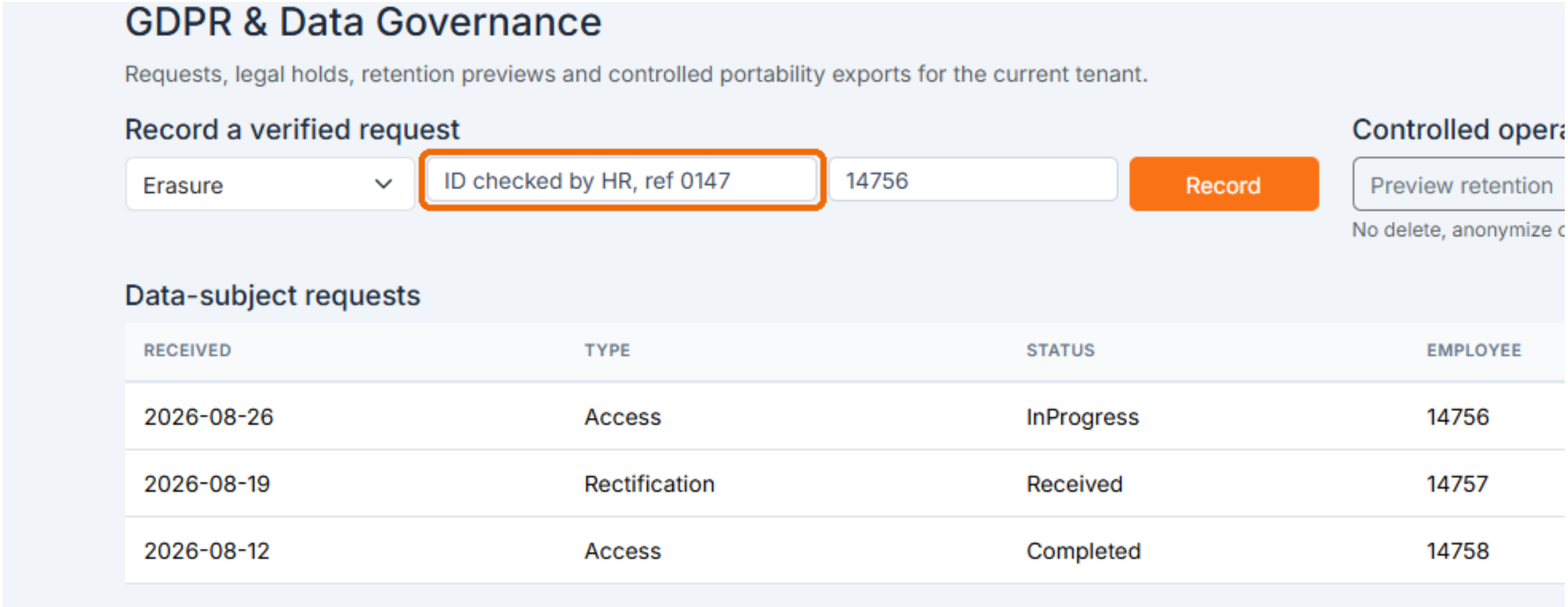
Choose the request type



Under Record a verified request, open the first list and choose what the person asked for: Access (a copy of their data), Correction (fix wrong data), Erasure (delete their data), Restriction (limit how it is used) or Portability (hand the data over in a reusable format).

GDPR & Data Governance

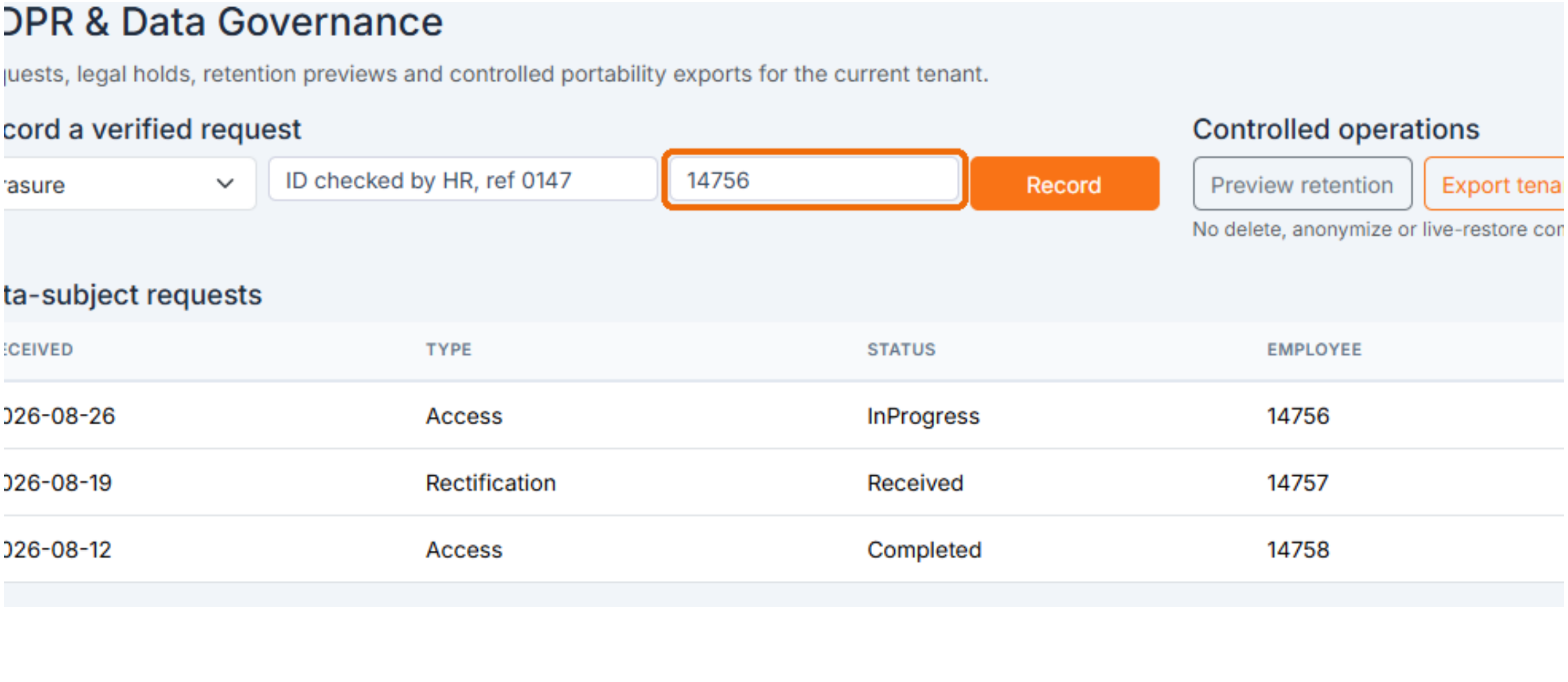
Verification reference



Verification reference is required and can be up to 128 characters. Record how you confirmed that the request really comes from the person, for example ID checked by HR, ref 0147. Write a reference to the check, not the ID document number itself, so no extra personal data is stored.

GDPR & Data Governance

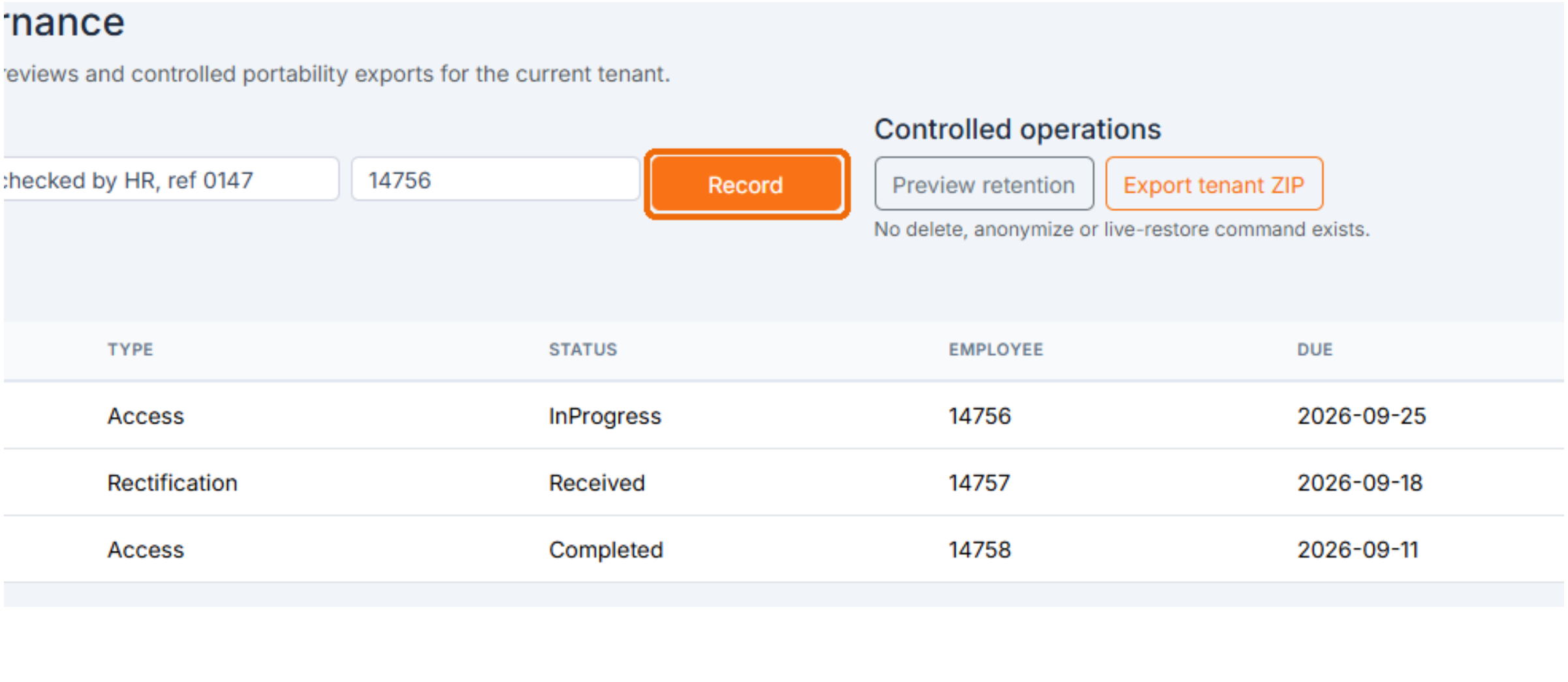
Employee ID



Employee ID (optional) links the request to an employee record. The ID must belong to the current organization; otherwise the request is not created. Leave it empty when the person is not in the system, for example a former applicant.

GDPR & Data Governance

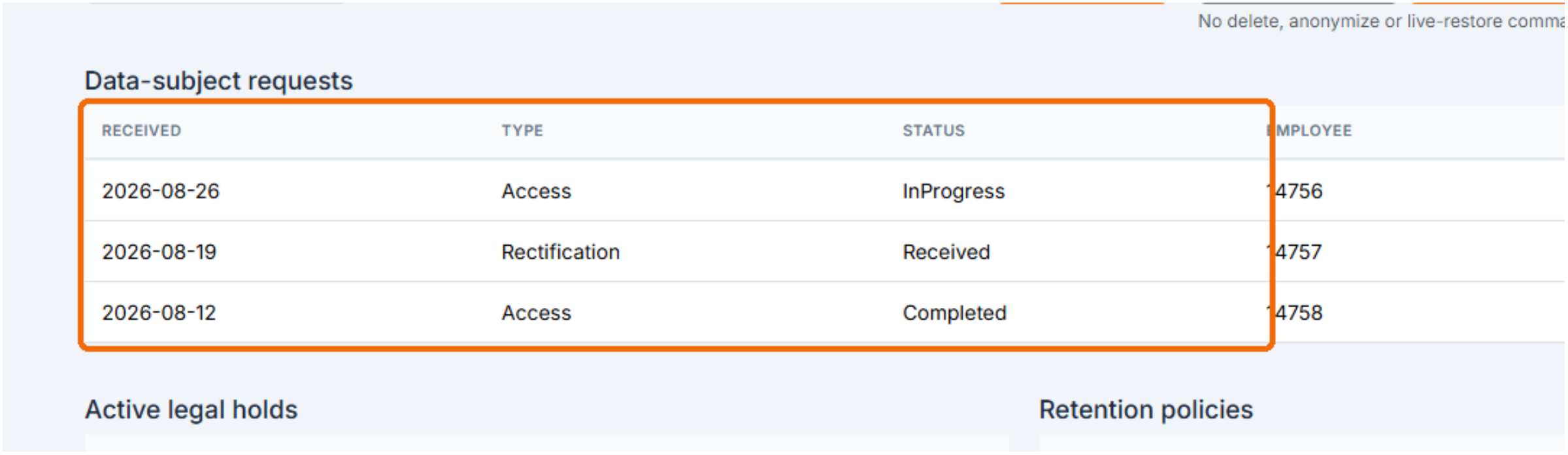
Record the request



Click Record. The request is saved with the status Received and a due date 30 days later, and an audit entry is written; the message Data-subject request #N was recorded and audited confirms it. Recording a request does not change or delete any data by itself. If the fields are disabled, the gdpr-workflows pilot flag is not yet enabled.

GDPR & Data Governance

Data-subject requests



Data-subject requests lists every recorded request, newest first. RECEIVED is the date it was recorded, TYPE is the kind of request and STATUS shows how far it is, for example Received, InProgress or Completed. When nothing has been recorded the table shows No requests recorded.

GDPR & Data Governance

Employee and deadline

No delete, anonymize or live-restore command exists.

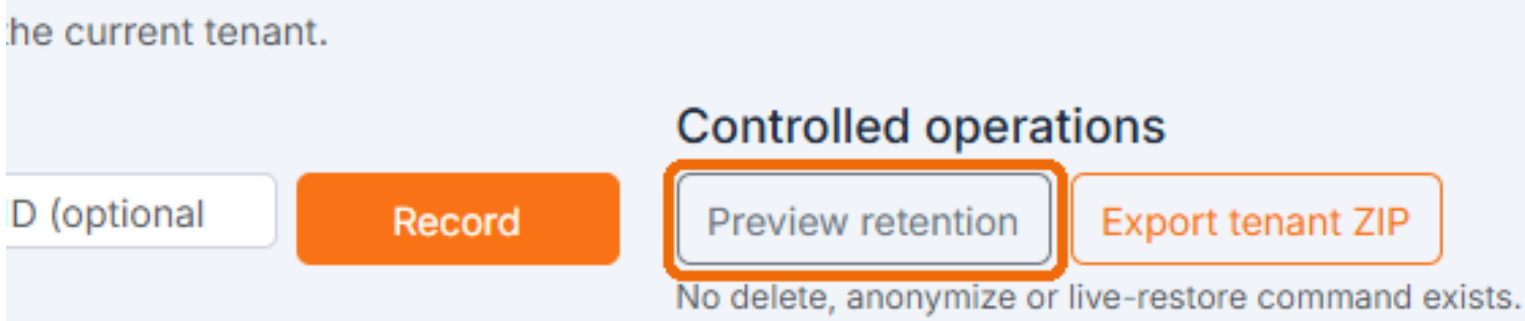
STATUS	EMPLOYEE	DUE
InProgress	14756	2026-09-25
Received	14757	2026-09-18
Completed	14758	2026-09-11

Retention policies

EMPLOYEE shows the ID of the linked employee, or - when none was given. DUE is the date by which the request should be answered: 30 days after it was received, in line with the one-month GDPR deadline. Check this column regularly so no request is answered late.

GDPR & Data Governance

Preview retention



STATUS	EMPLOYEE	DUE
InProgress	14756	2026-09-25
Received	14757	2026-09-18
Completed	14758	2026-09-11

Under Controlled operations, Preview retention checks which compliance audit records are older than the retention period and shows them in a Retention preview (no changes made) table with the resource, date, planned disposition and whether a legal hold protects it. It only previews: nothing is deleted or anonymised. When no records are due, as in the demo, no table appears.

GDPR & Data Governance

Export tenant ZIP

he current tenant.

D (optional

Record

Controlled operations

Preview retention

Export tenant ZIP

No delete, anonymize or live-restore command exists.

STATUS	EMPLOYEE	DUE
InProgress	14756	2026-09-25
Received	14757	2026-09-18
Completed	14758	2026-09-11

Export tenant ZIP downloads one ZIP file with a manifest and the organization's workers, administration staff, archived records, compliance obligations, lifecycle records, actions and legal holds. A SHA-256 fingerprint is saved and the export is audited. The file contains personal data, so store it securely. As the note says, no delete, anonymize or live-restore command exists here.

GDPR & Data Governance

Active legal holds

2026-08-12	Access	Completed	14758

Active legal holds

RESOURCE	REASON	CREATED
EmployeeProfile DEMO-HOLD-001	Preserve records for fictional insurance review.	2026-08-19

Retention policies

RESOURCE	DAY
ApplicantRecord	730
EmployeeProfile	25
SafetyEvidence	36

A legal hold keeps a record from being removed by retention, for example during an insurance review or a dispute. RESOURCE identifies the protected record, REASON explains why it is kept and CREATED shows when the hold started. Held records are flagged in the retention preview.

GDPR & Data Governance

Retention policies

Completed	14758	2026-09-11

CREATED
2026-08-19

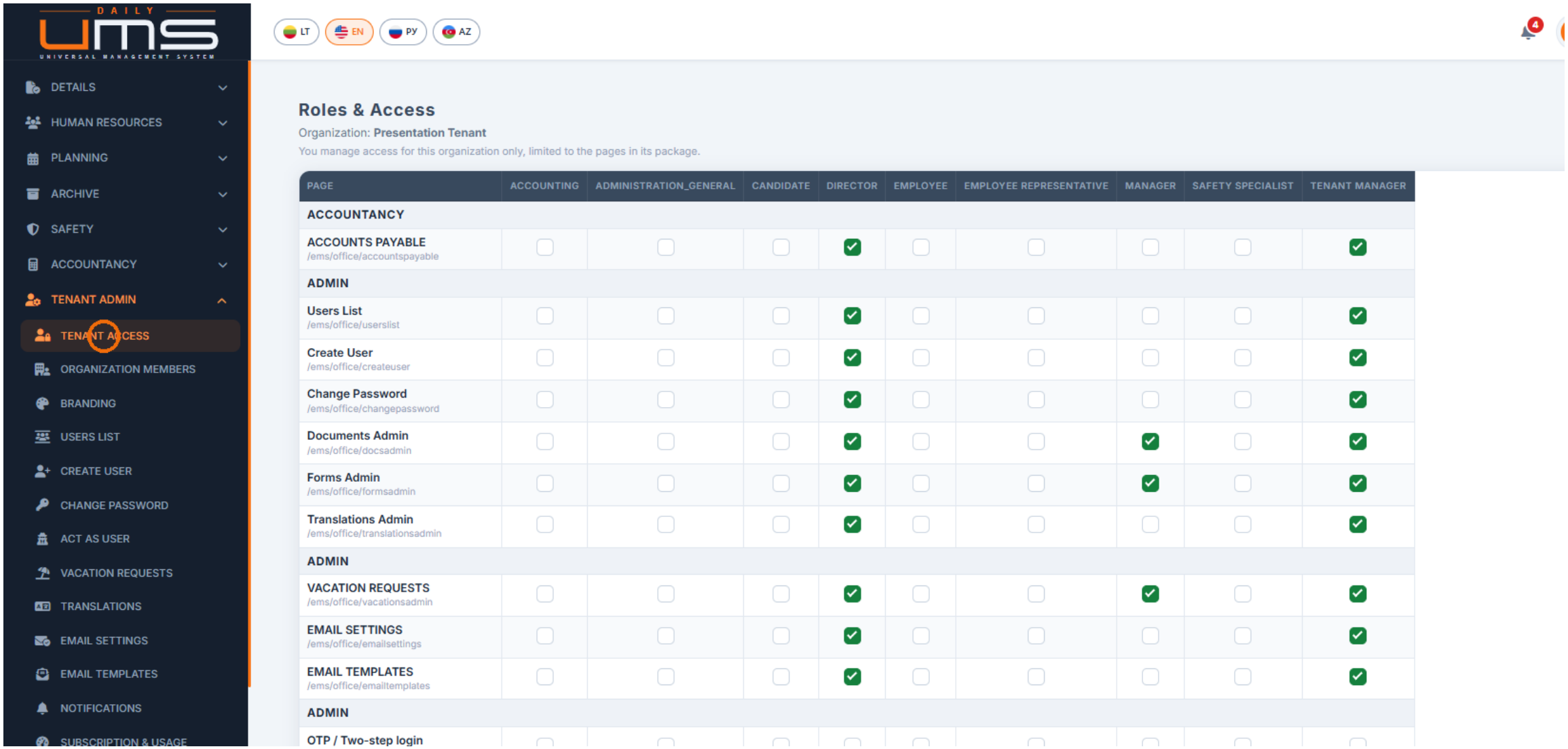
Retention policies

RESOURCE	DAYS	DISPOSITION	ENABLED
ApplicantRecord	730	Anonymize	True
EmployeeProfile	2555	Review	True
SafetyEvidence	3650	Review	True

Each policy names a RESOURCE type, the number of DAYS it is kept, the DISPOSITION after that period (Anonymize or Review) and whether it is ENABLED. In the demo, applicant records are kept 730 days (2 years), employee profiles 2555 days (about 7 years) and safety evidence 3650 days (10 years).

Tenant Access (Roles & Access)

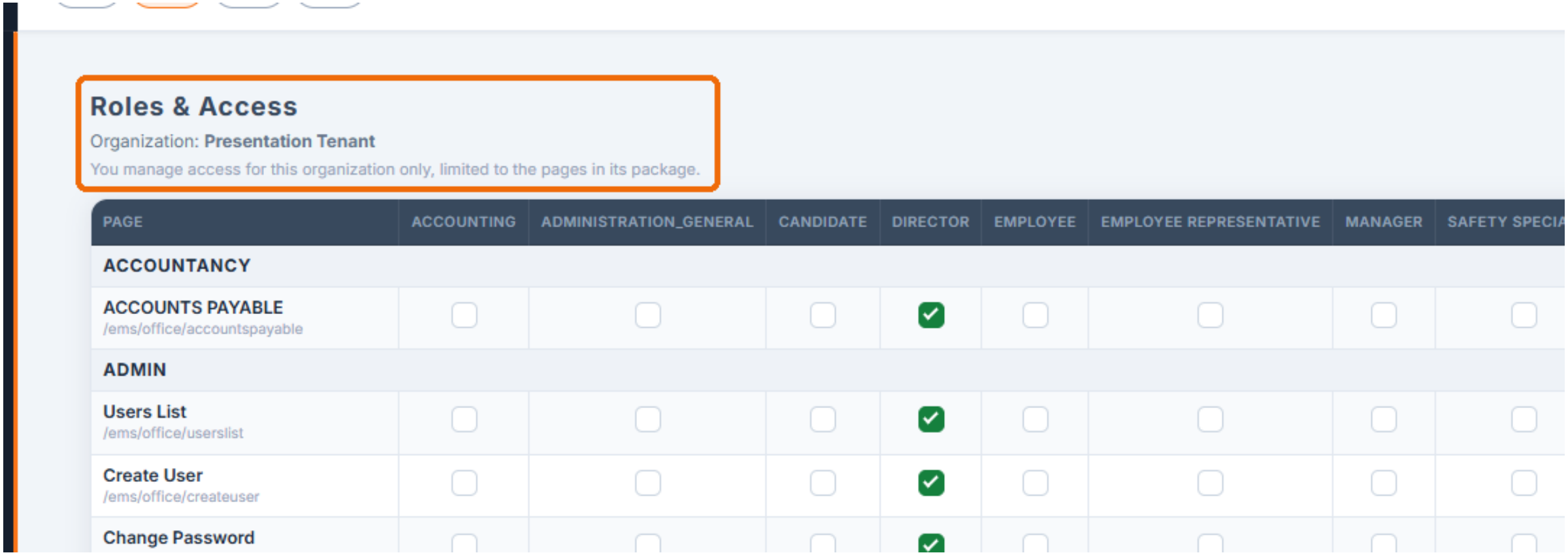
Open Tenant Access



Open Tenant Admin > Tenant Access in the side menu. The page is called Roles & Access. It controls which roles can open which pages in the current organization (tenant). A person sees a page in the side menu only when one of their roles in this organization is ticked for that page.

Tenant Access (Roles & Access)

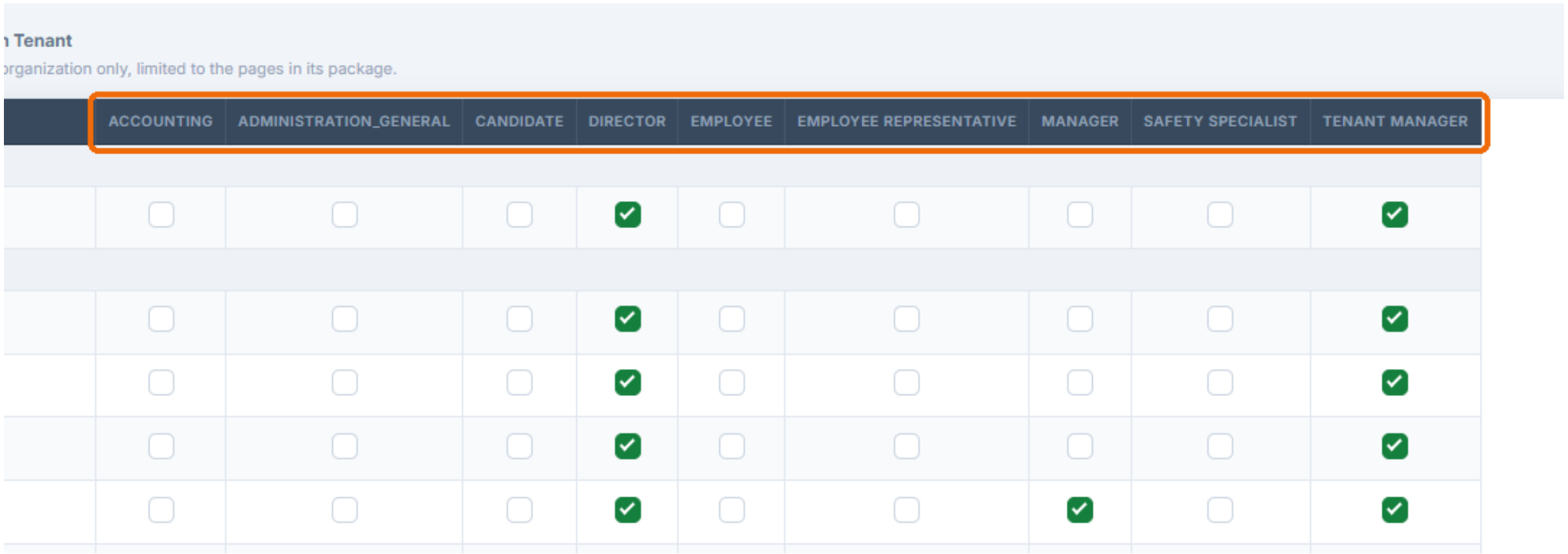
Your organization only



The line under the title names the organization you are editing (here Presentation Tenant). You manage access for this organization only: other organizations keep their own settings. Pages that are not part of the organization's subscription package are not listed at all, so you cannot grant access to a module the organization has not bought.

Tenant Access (Roles & Access)

Roles are the columns



Every column after PAGE is one role, for example Accounting, Administration_General, Candidate, Director, Employee, Employee representative, Manager, Safety specialist and Tenant Manager. Read a column from top to bottom to see everything that role can open. The GLOBAL ADMIN role is reserved for the platform administrator and is not shown.

Tenant Access (Roles & Access)

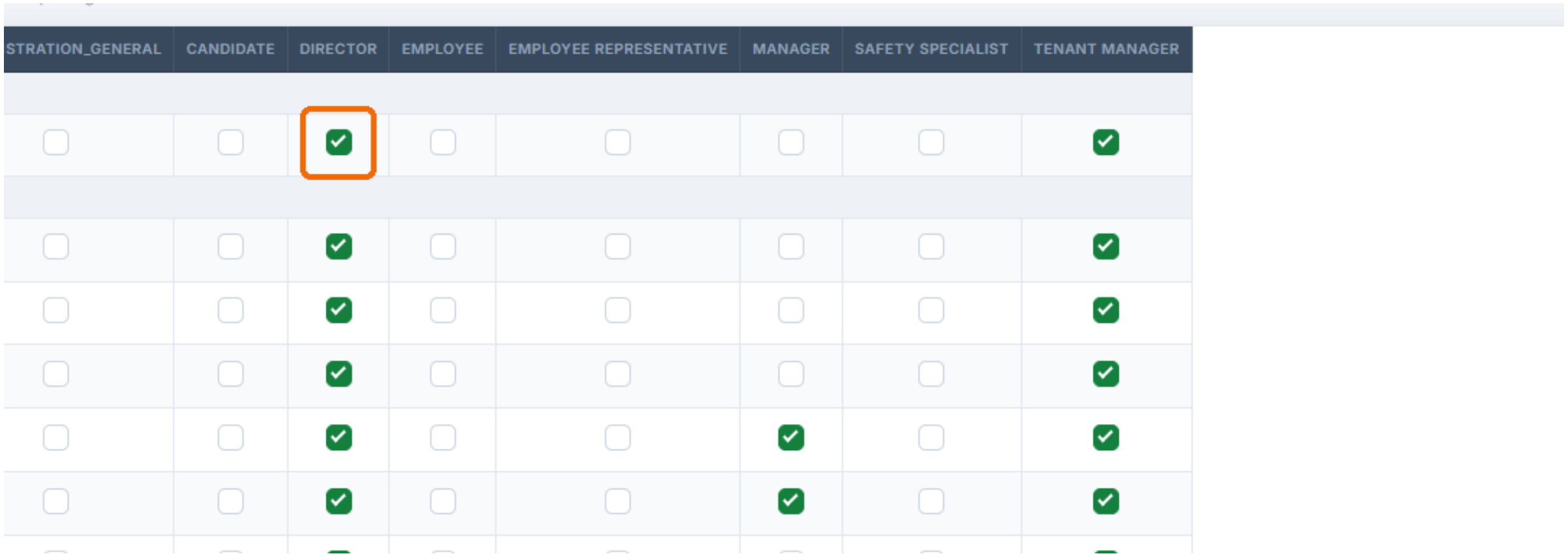
Pages are the rows

PAGE	ACCOUNTING	ADMINISTRATION_GENERAL	CANDIDATE	DIRECTOR	EMPLOYEE	EMPLOYEE REPRESENTATIVE	MANAGER	SAFETY SPECIAL
ACCOUNTANCY								
ACCOUNTS PAYABLE /ems/office/accountspayable	☐	☐	☐	☑	☐	☐	☐	☐
ADMIN								
Users List /ems/office/userslist	☐	☐	☐	☑	☐	☐	☐	☐
Create User /ems/office/createuser	☐	☐	☐	☑	☐	☐	☐	☐
Change Password /ems/office/changepassword	☐	☐	☐	☑	☐	☐	☐	☐
Documents Admin /ems/office/docsadmin	☐	☐	☐	☑	☐	☐	☑	☐
Forms Admin /ems/office/formsadmin	☐	☐	☐	☑	☐	☐	☑	☐
Translations Admin	☐	☐	☐	☑	☐	☐	☐	☐

Every row is one page. Rows are grouped under the side-menu section they belong to (ACCOUNTANCY, ADMIN and so on). The grey text under each page name is its address, for example /ems/office/accountspayable, which helps when two pages have similar names.

Tenant Access (Roles & Access)

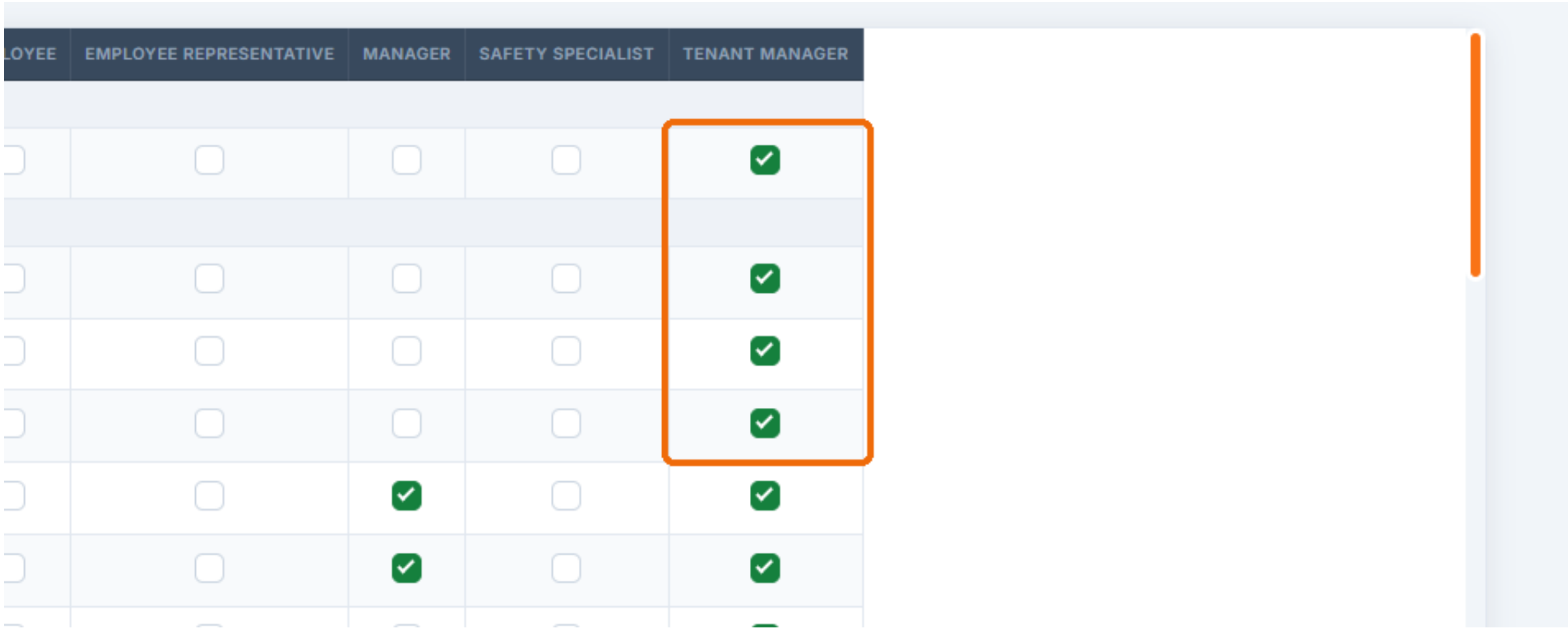
Grant or revoke access



A green tick means the role has access to the page; an empty box means it does not. Clicking a box grants or revokes access immediately: there is no separate Save button, and the side menu of the affected people updates on their next page load. Because changes are instant, check the row and column before you click.

Tenant Access (Roles & Access)

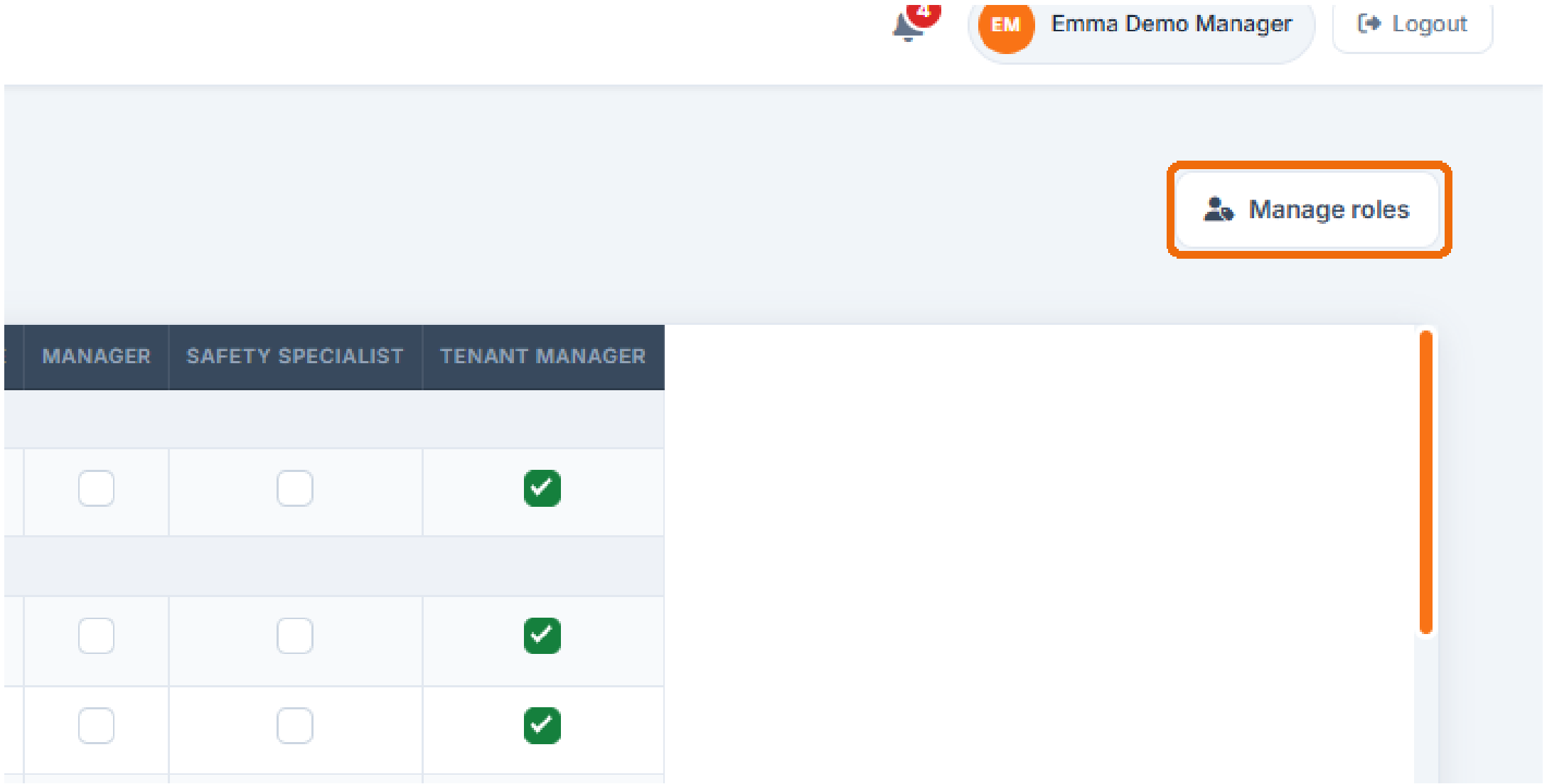
The Tenant Manager column



The Tenant Manager column is ticked on almost every page, including the admin pages such as Users List, Create User and Change Password. Untick a page here only if your managers really should not use it. Tenant Access, Organization Members, Branding and Act As User are not listed in the matrix at all, so the Tenant Manager can never remove their own access to this page.

Tenant Access (Roles & Access)

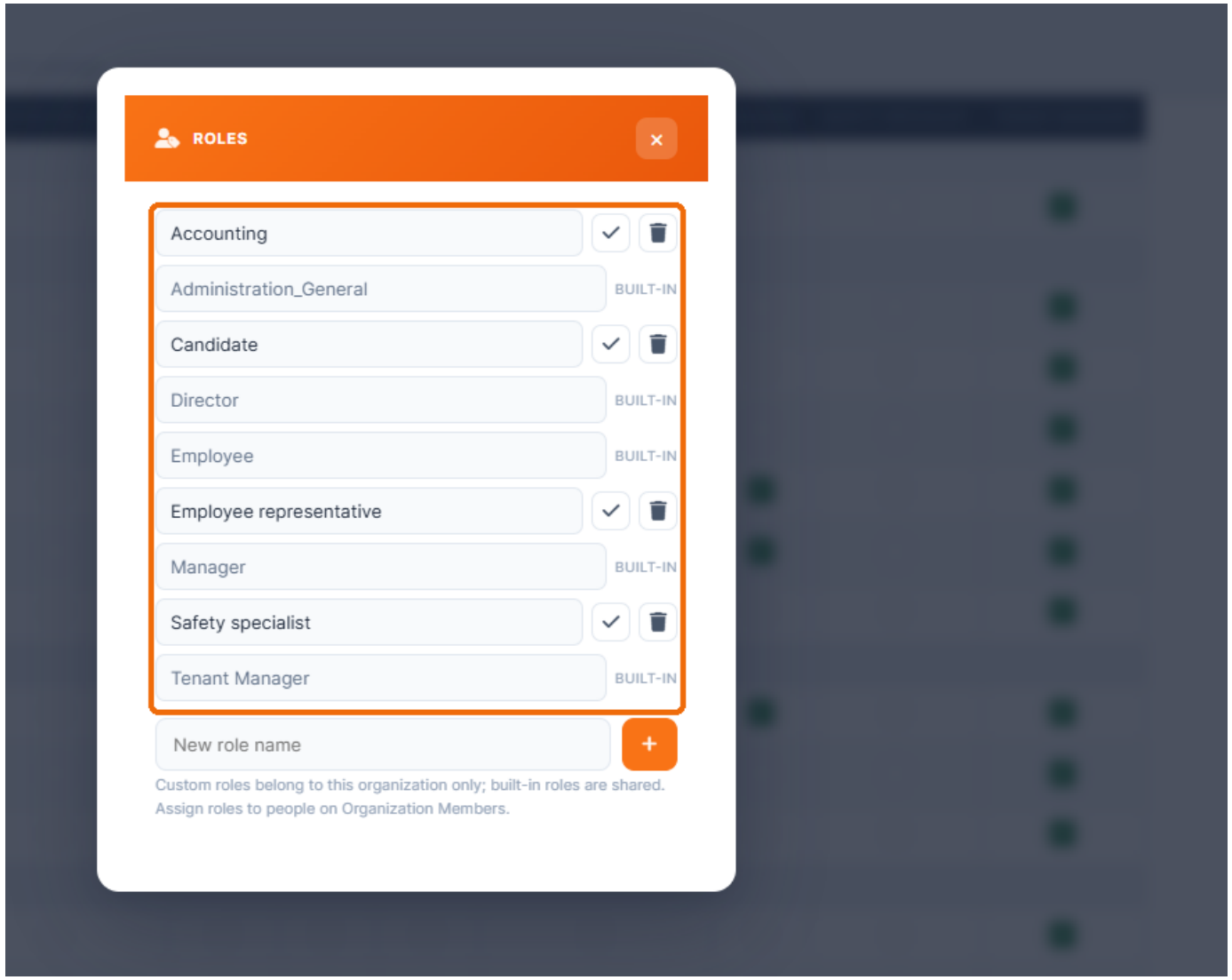
Manage roles



Click Manage roles in the top-right corner to see, add, rename or delete roles. The list shows the shared built-in roles plus the custom roles of YOUR organization only. Roles are assigned to people on the Organization Members page; this page only decides what each role can open.

Tenant Access (Roles & Access)

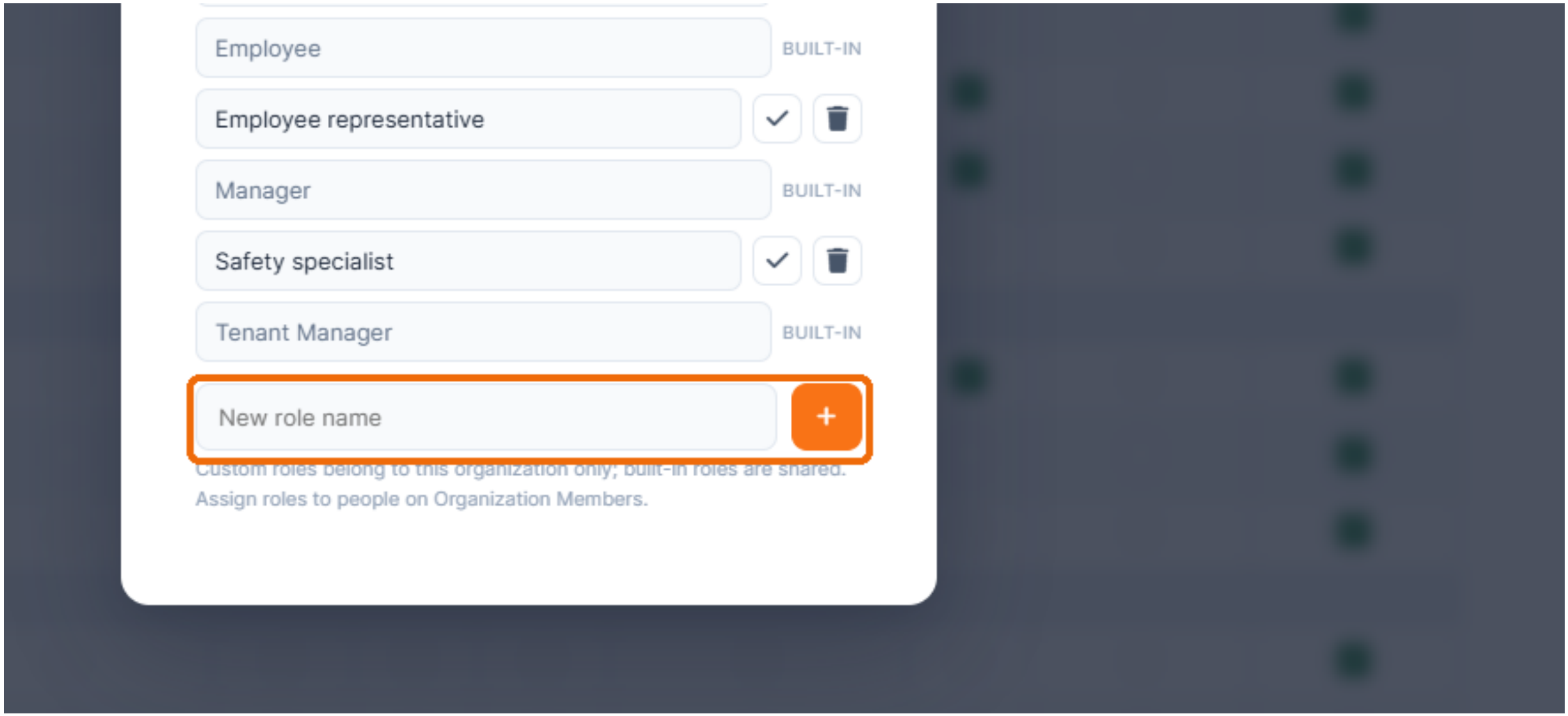
The roles list



The Roles window lists every role your organization can use. Roles marked BUILT-IN (Administration_General, Director, Employee, Manager, Tenant Manager) are shared by all organizations and used by the app itself, so only the platform administrator can rename or delete them. Custom roles such as Accounting or Candidate belong to your organization: the tick button renames and the bin button deletes them. Renaming keeps the role's page access and its people.

Tenant Access (Roles & Access)

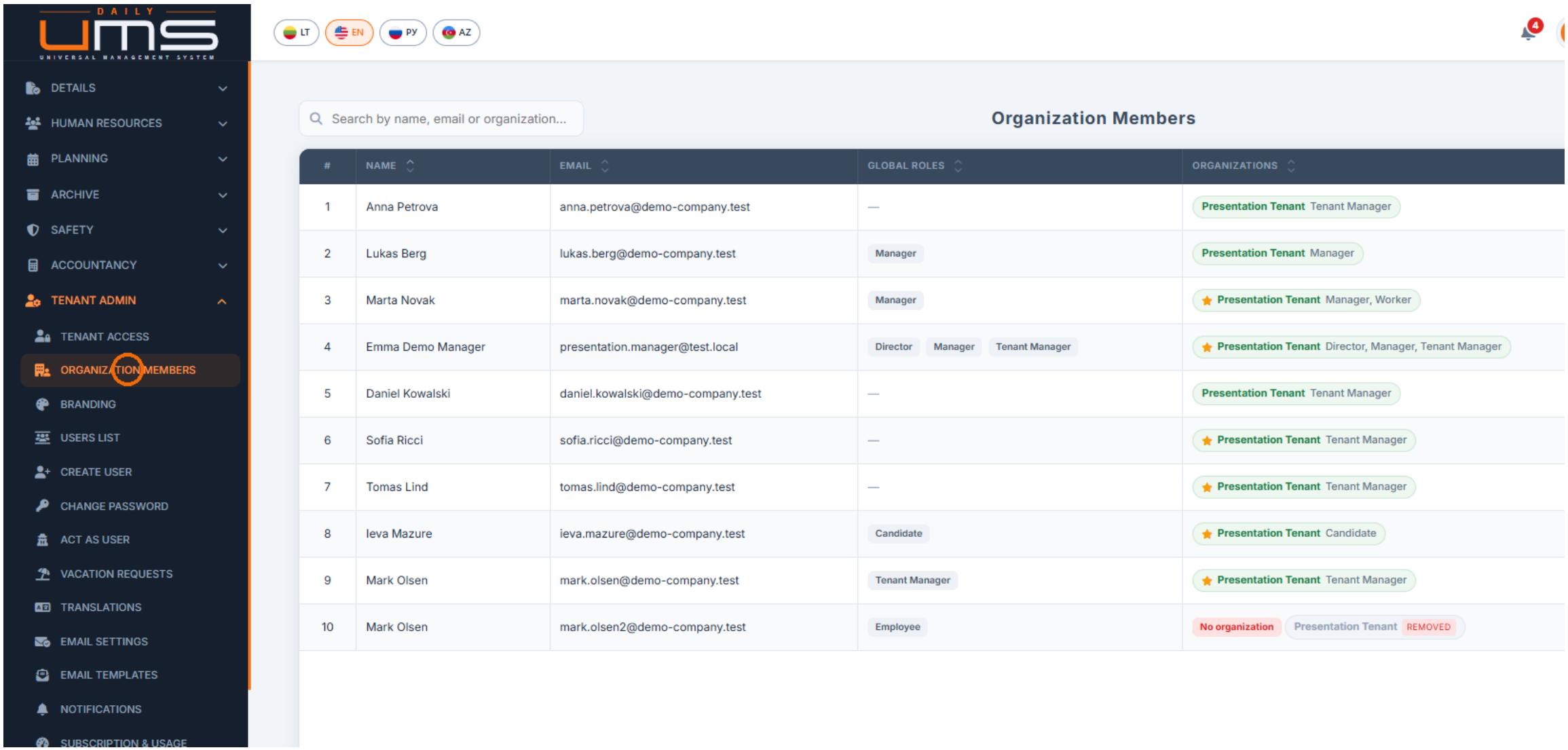
Add a new role



Type a name in New role name and press the orange + button to create a custom role; it appears as a new column in the matrix with no access. Custom roles belong to your organization only: adding, renaming or deleting one never changes another organization. Deleting a role (after a confirmation) removes its page access and takes it away from the people in your organization who had it.

Organization Members

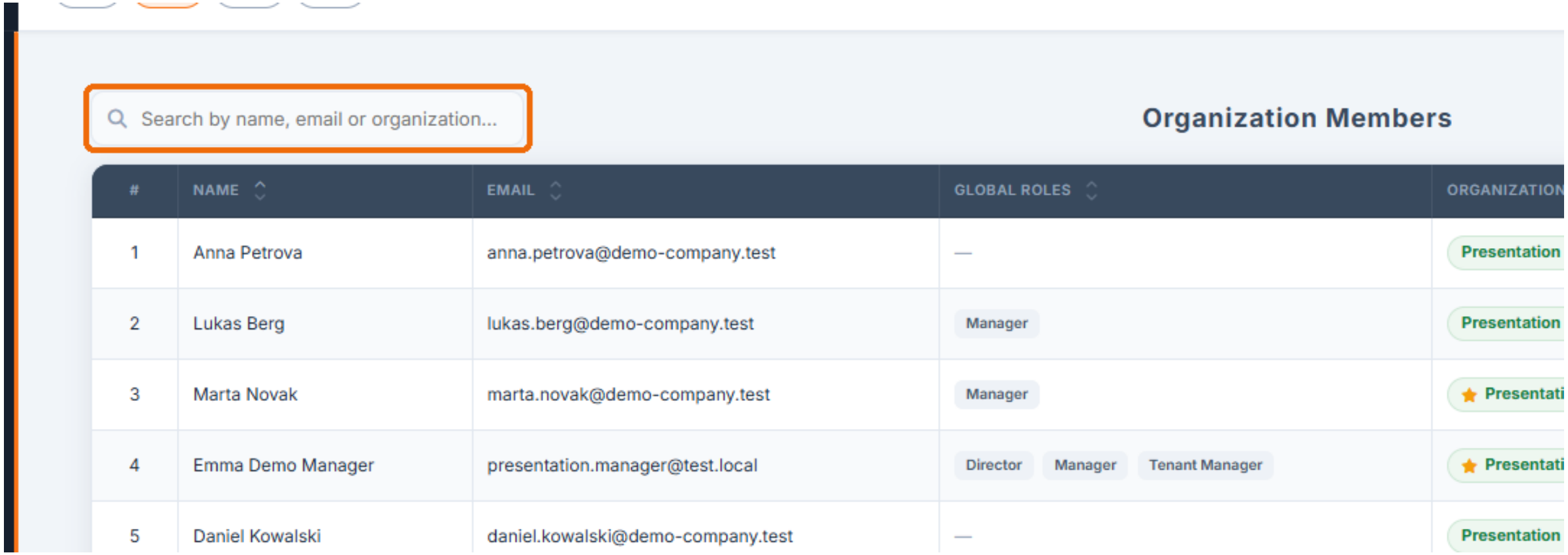
Open Organization Members



Open Tenant Admin > Organization Members in the side menu. The list shows every login that belongs to an organization where you hold the Tenant Manager role, together with the roles each person has there. Logins without any organization and platform administrators are not shown to a Tenant Manager; they are handled by the platform administrator. Names and emails in this lesson are demo placeholders.

Organization Members

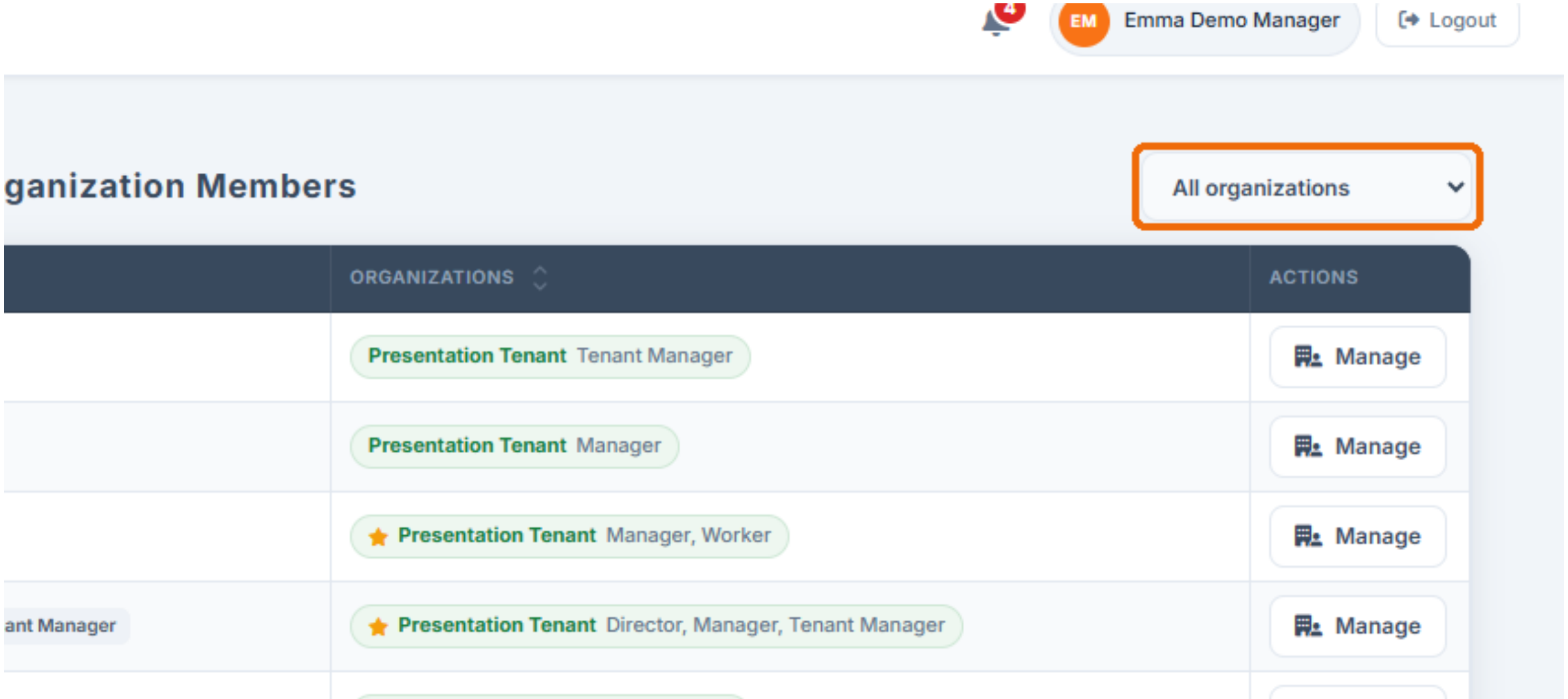
Search members



Type in the search box to filter the list by name, email, organization or role. The list updates as you type. Column headers with arrows (Name, Email, Global roles, Organizations) can be clicked to sort the list.

Organization Members

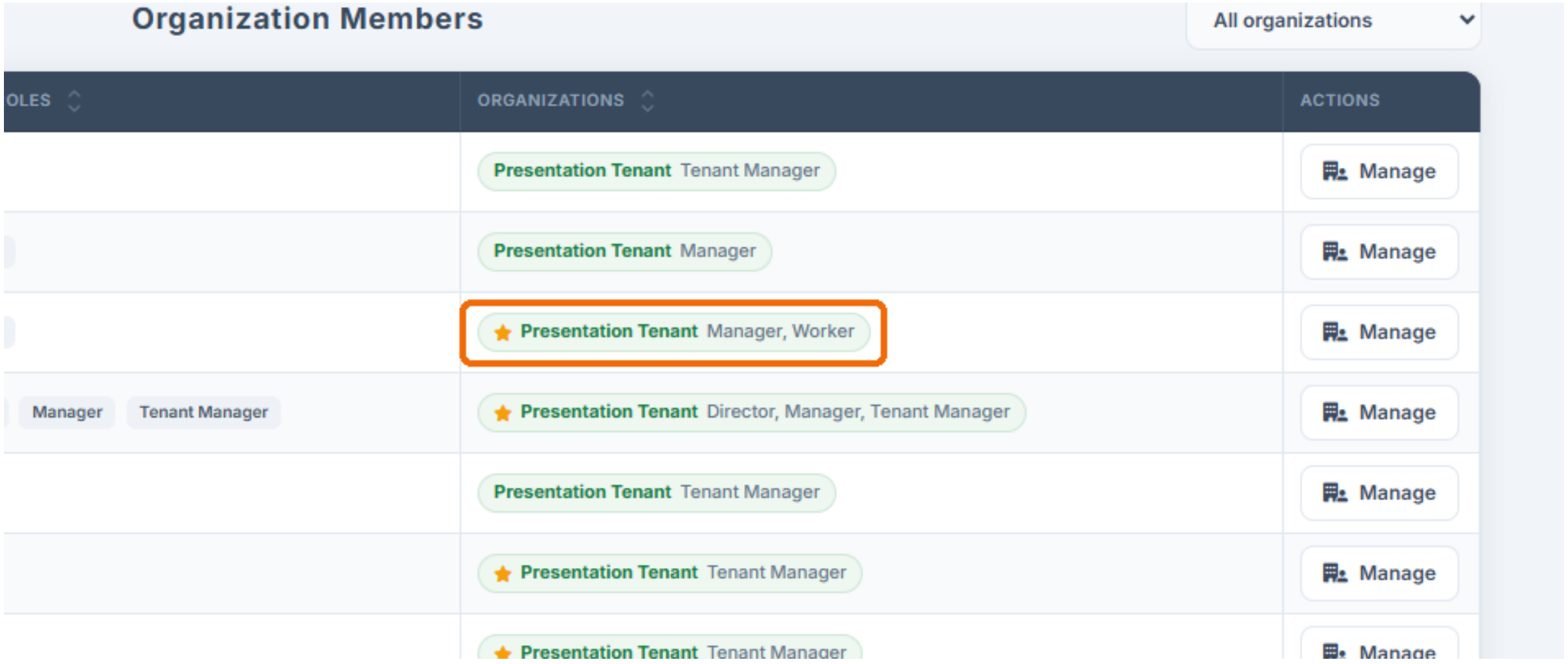
Filter by organization



The drop-down in the top-right corner limits the list to one organization. It shows All organizations by default and lists only the organizations you manage. This is useful when you are Tenant Manager in more than one organization.

Organization Members

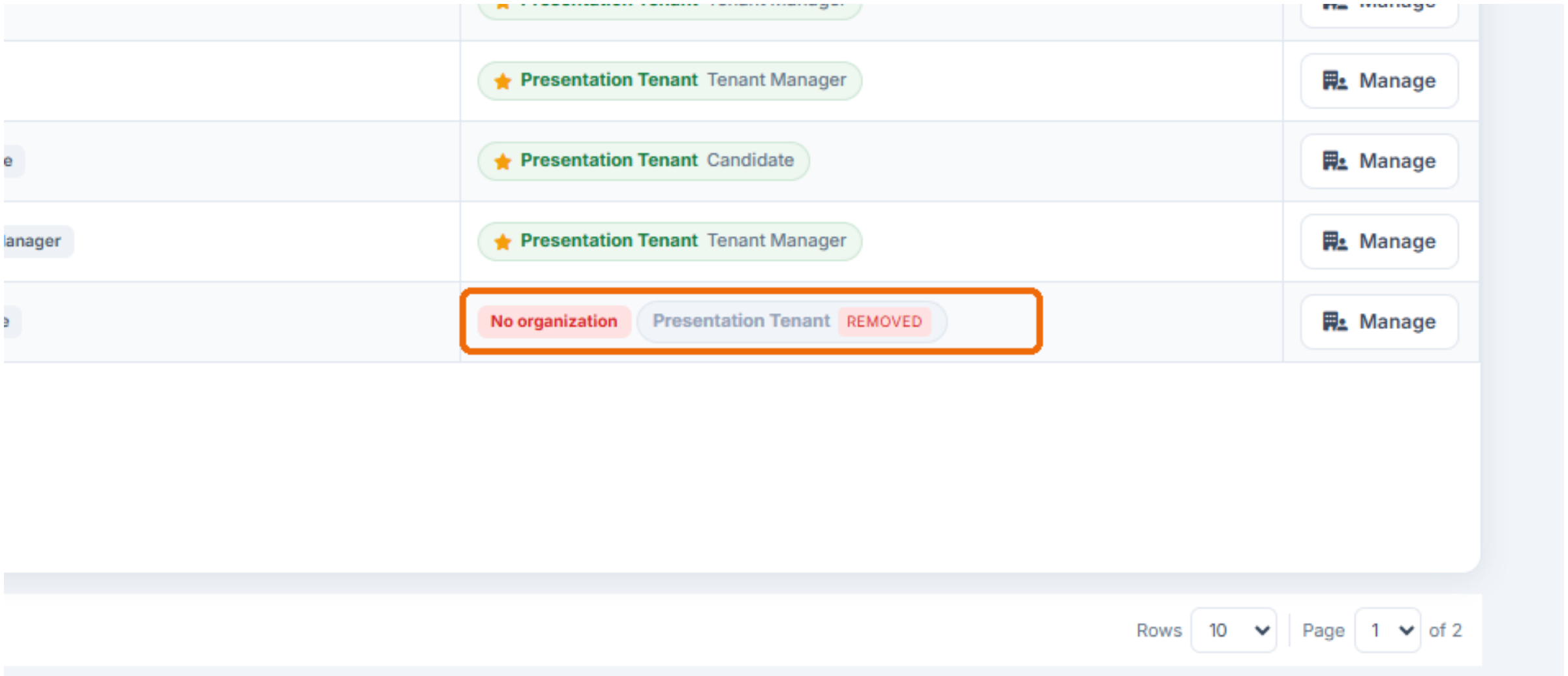
Roles per organization



The Organizations column shows one green tag per organization the person belongs to, followed by the roles they have in that organization (for example Manager, Worker). A star in the tag marks the person's default organization, the one they land in after signing in. Global roles is the older, account-wide role list and is shown for reference.

Organization Members

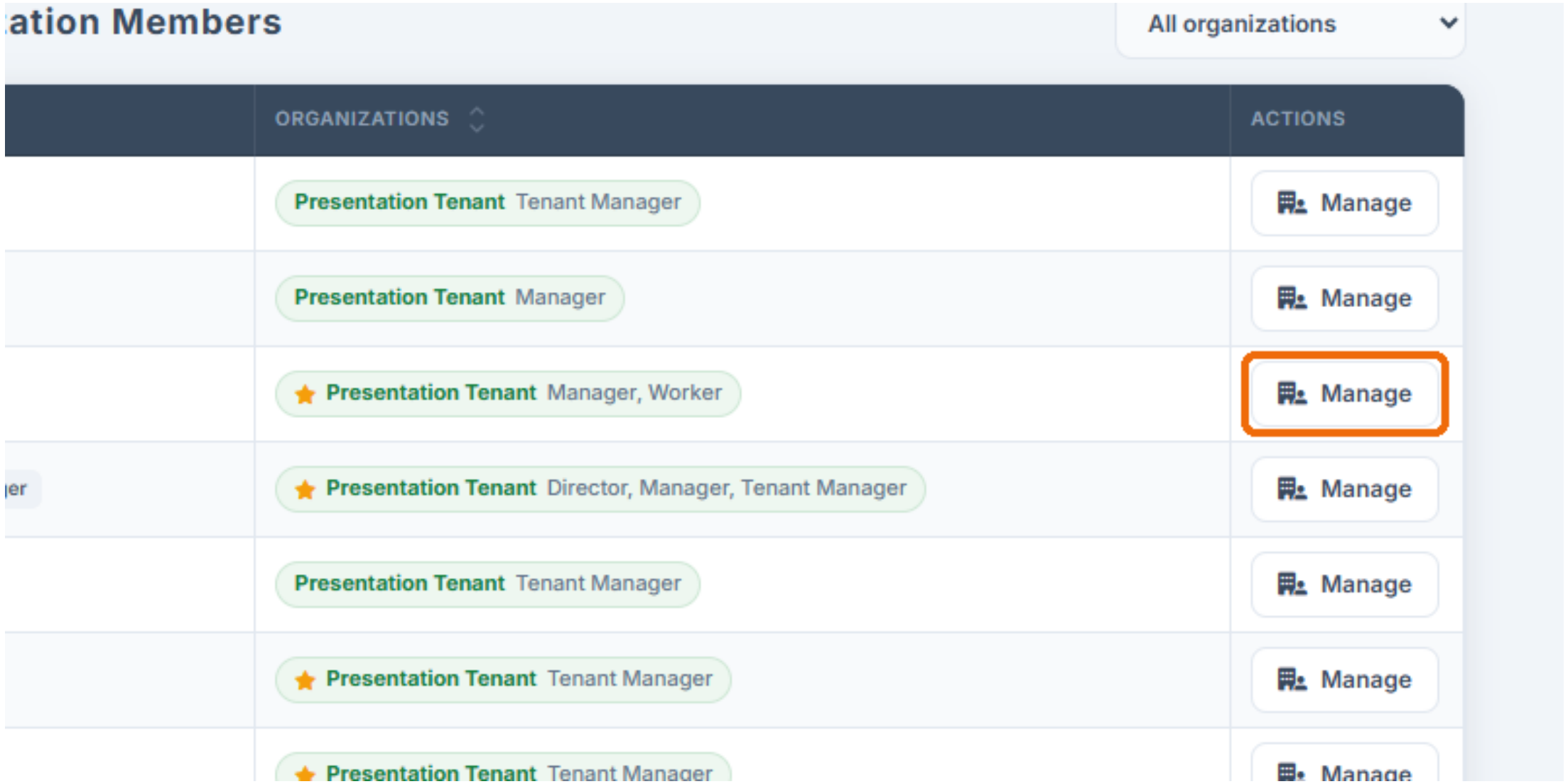
Removed memberships



A red No organization tag means the login currently belongs to no active organization. A grey tag marked REMOVED shows an organization the person used to belong to. Such a person can no longer open this organization's data, but their history is kept and the membership can be restored from the Manage window.

Organization Members

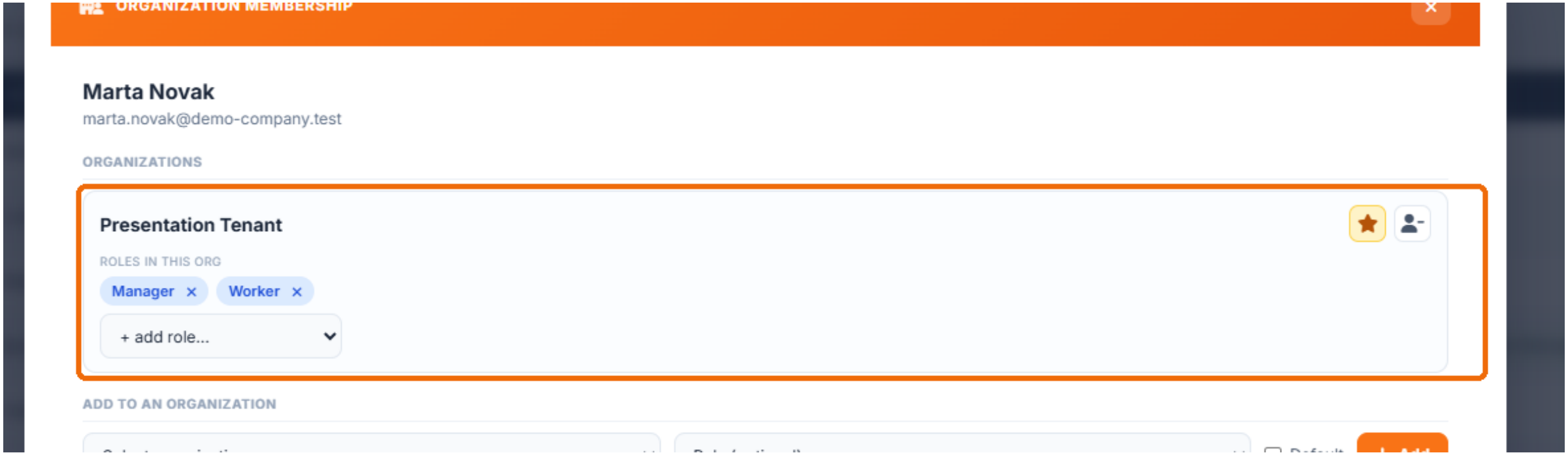
Manage a member



Click Manage at the end of a row to open the Organization membership window for that person. New people are not added here: create their login on Create User first, then manage their memberships on this page.

Organization Members

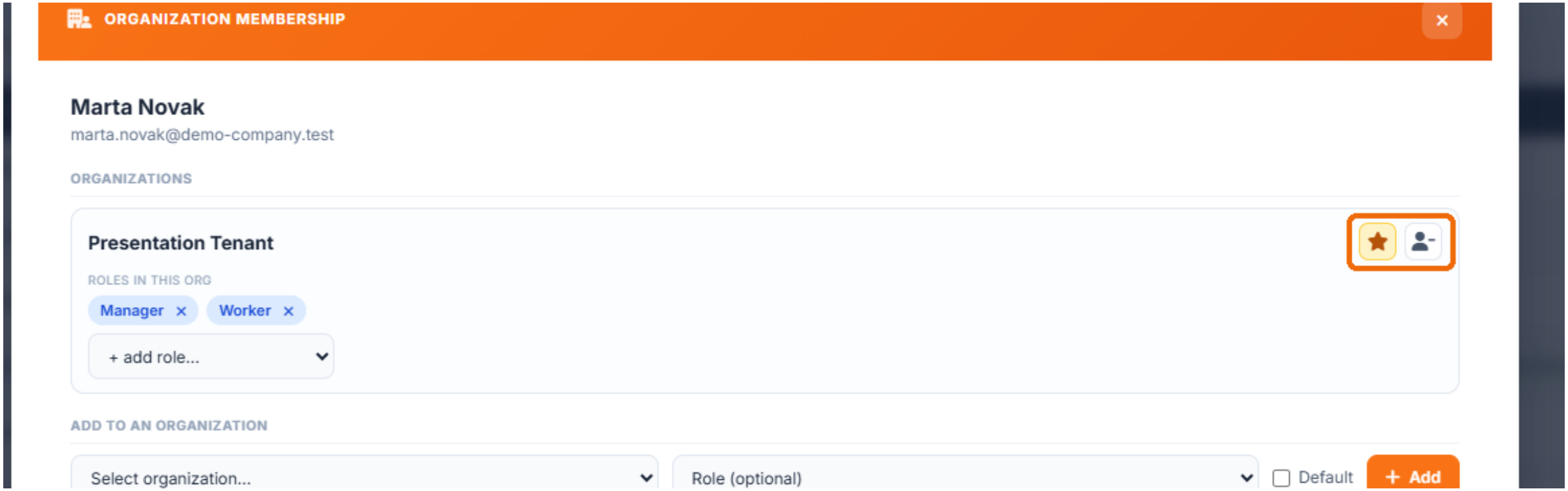
Roles in this organization



The window shows the person's name and email, then one card per organization. Under ROLES IN THIS ORG every role is a blue chip: click the small x on a chip to take that role away, or choose a role in + add role to give one more. Each change is saved immediately and the card refreshes. The roles decide which pages the person sees, as set on Tenant Access.

Organization Members

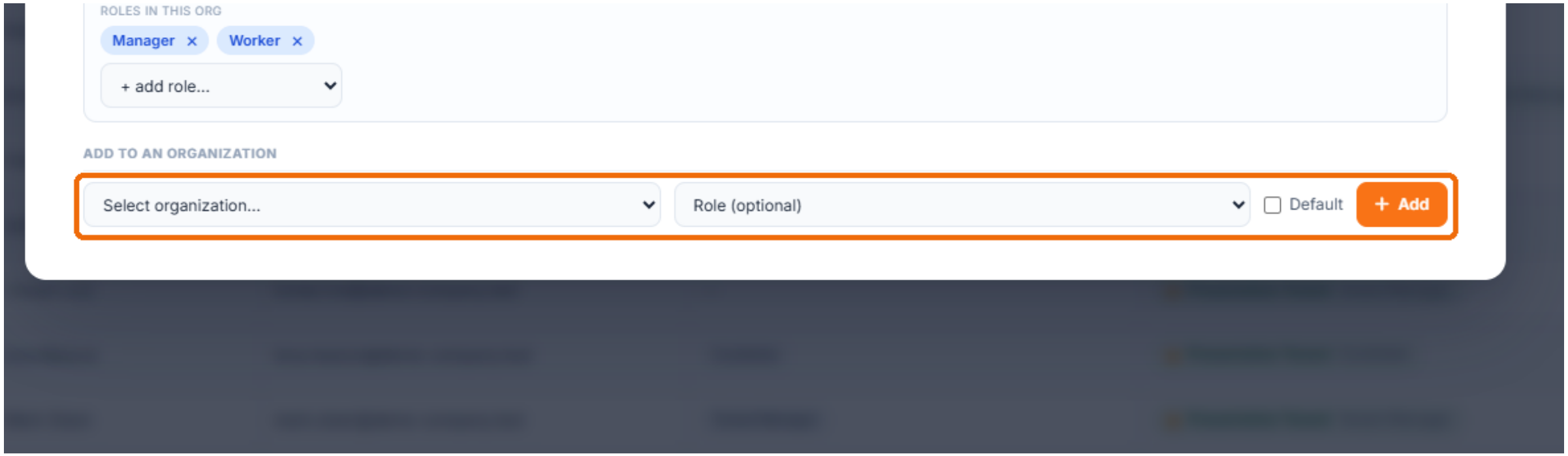
Default organization and removal



In the top-right corner of each organization card there are two buttons. The star makes this organization the person's default (a filled orange star means it already is). The person-minus button removes the login from the organization after a confirmation; the person keeps their account but can no longer work in that organization.

Organization Members

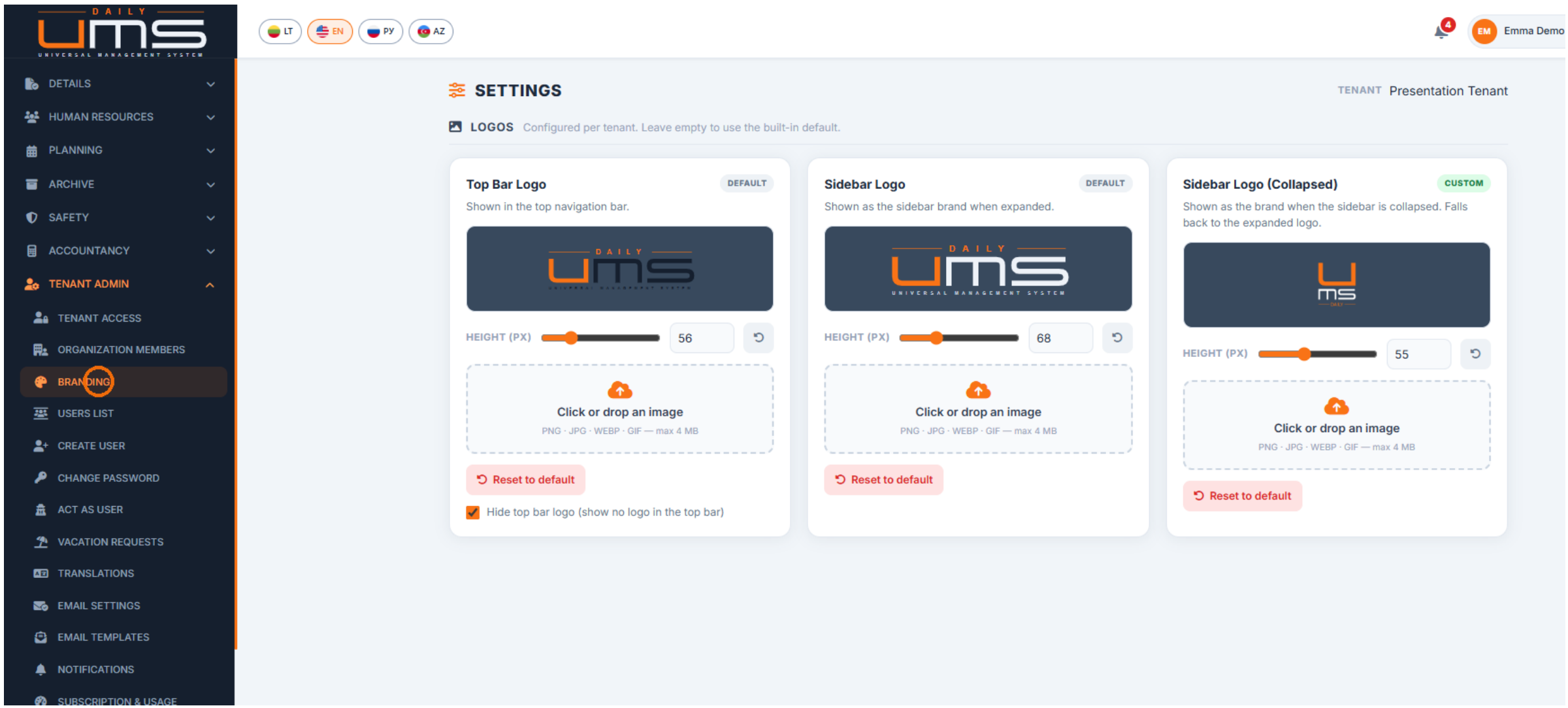
Add to an organization



Use ADD TO AN ORGANIZATION to give the person access to another organization you manage: pick the organization, optionally a role and tick Default if it should become their default organization, then press Add. A Tenant Manager can only choose organizations they manage. Close the window with the x when you are done; the list updates automatically.

Branding (Logos)

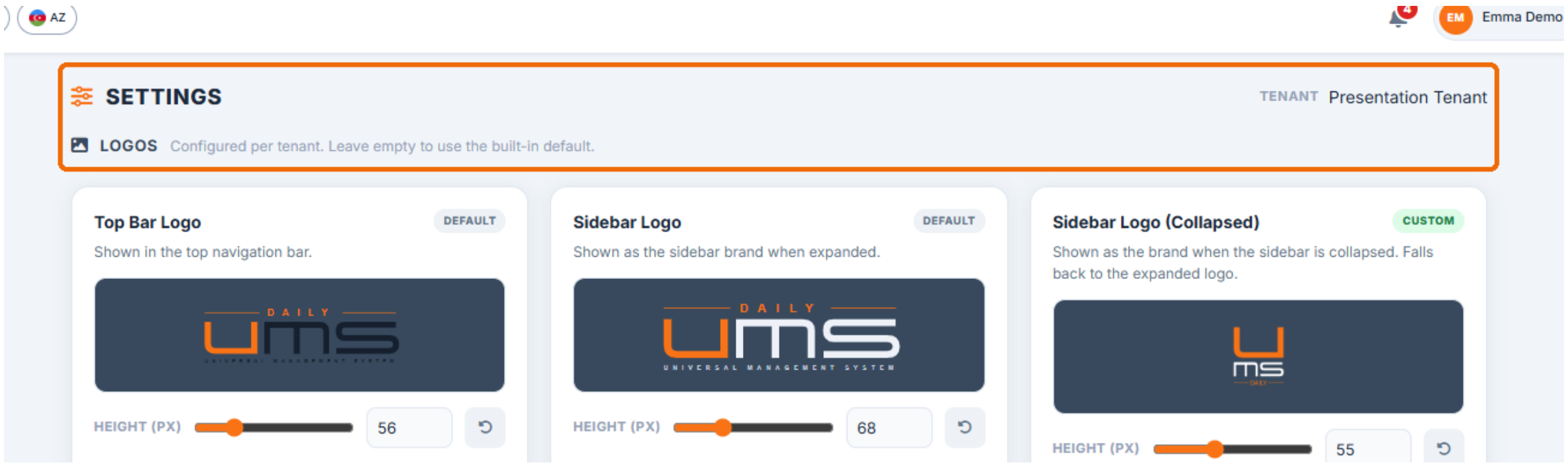
Open Branding



Open Tenant Admin > Branding in the side menu. The page is titled SETTINGS and has one section, LOGOS. Here you replace the Daily UMS logos with your own company logo, so your people see your brand when they work in the app.

Branding (Logos)

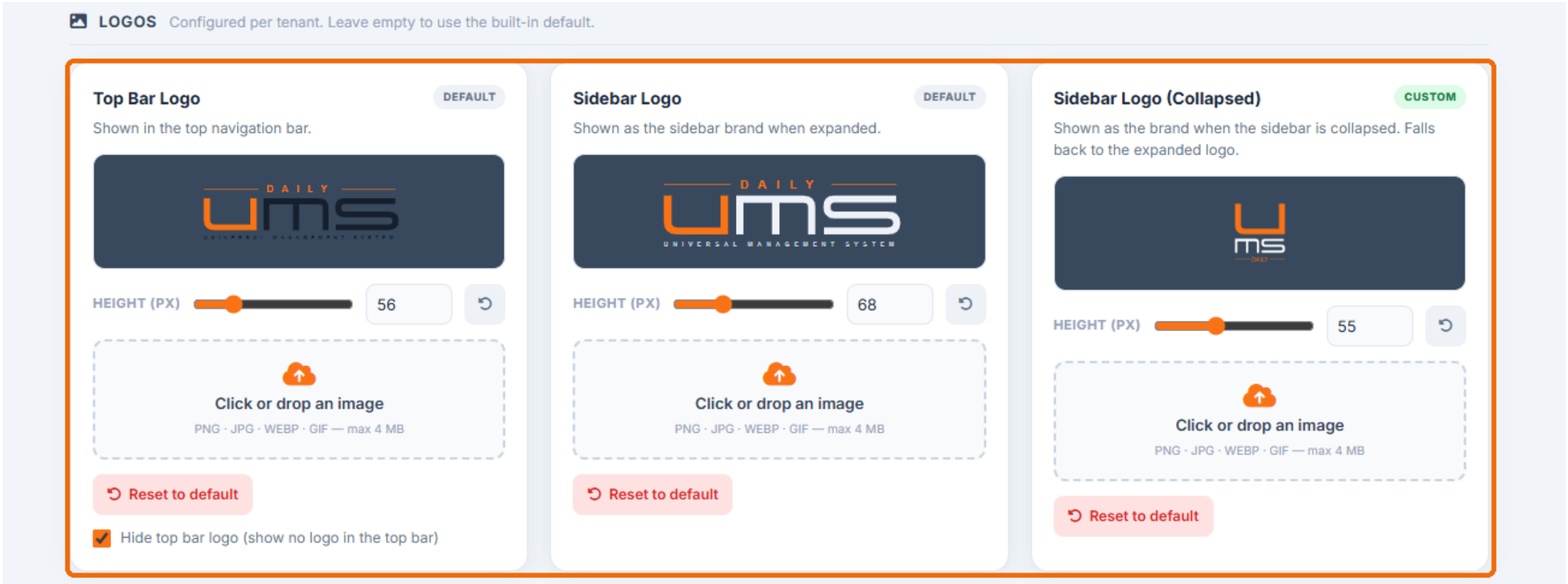
Logos per organization



The organization you are editing is shown on the right (TENANT: Presentation Tenant). Logos are stored per organization (tenant), so each company that uses the app can have its own branding. A slot that is left empty simply shows the built-in Daily UMS logo.

Branding (Logos)

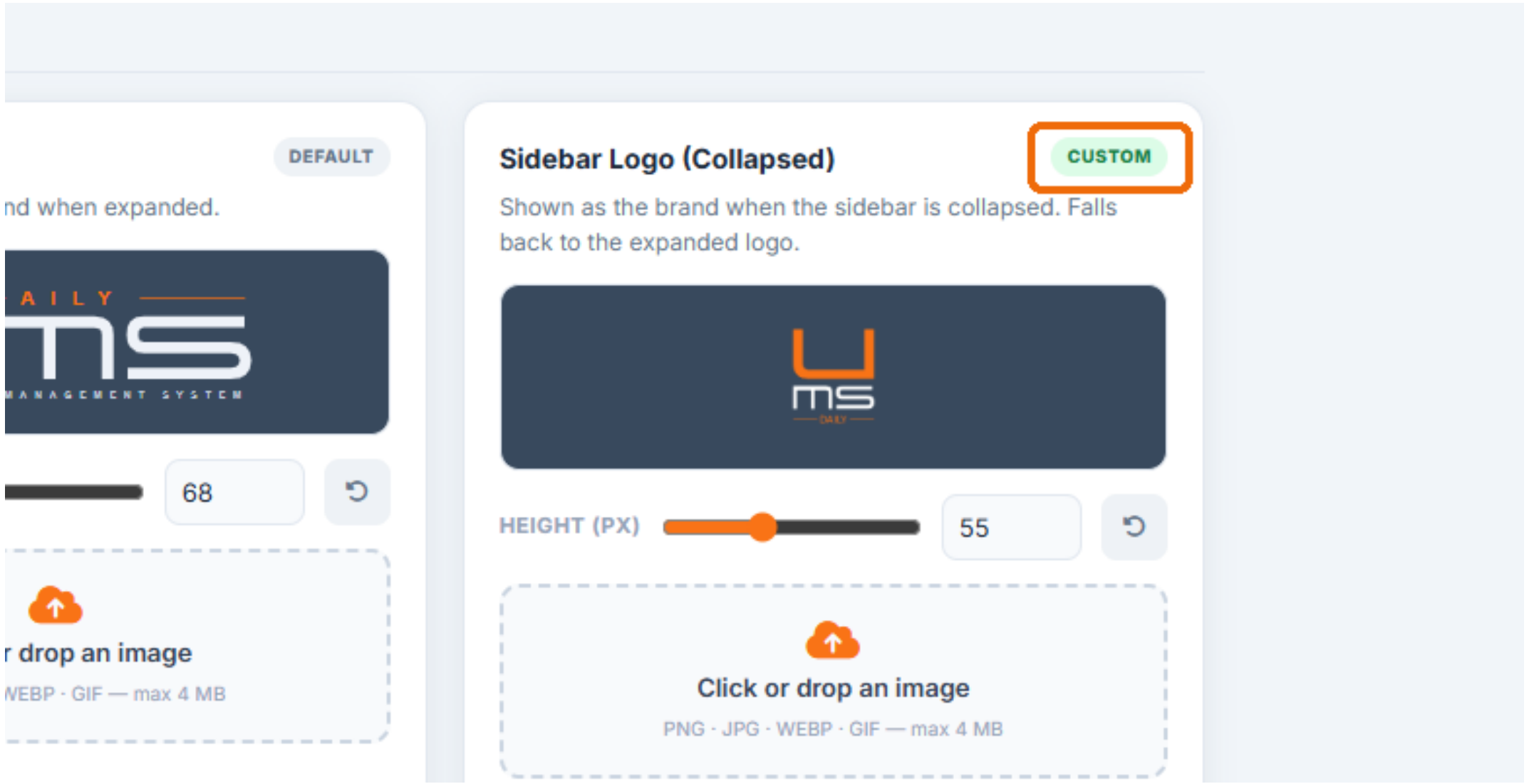
Three logo slots



Each card is one place where a logo appears. Top Bar Logo is shown in the top navigation bar. Sidebar Logo is the brand at the top of the expanded side menu. Sidebar Logo (Collapsed) is shown when the side menu is folded to icons; if it is empty, the expanded sidebar logo is used. The dark box in each card is a live preview.

Branding (Logos)

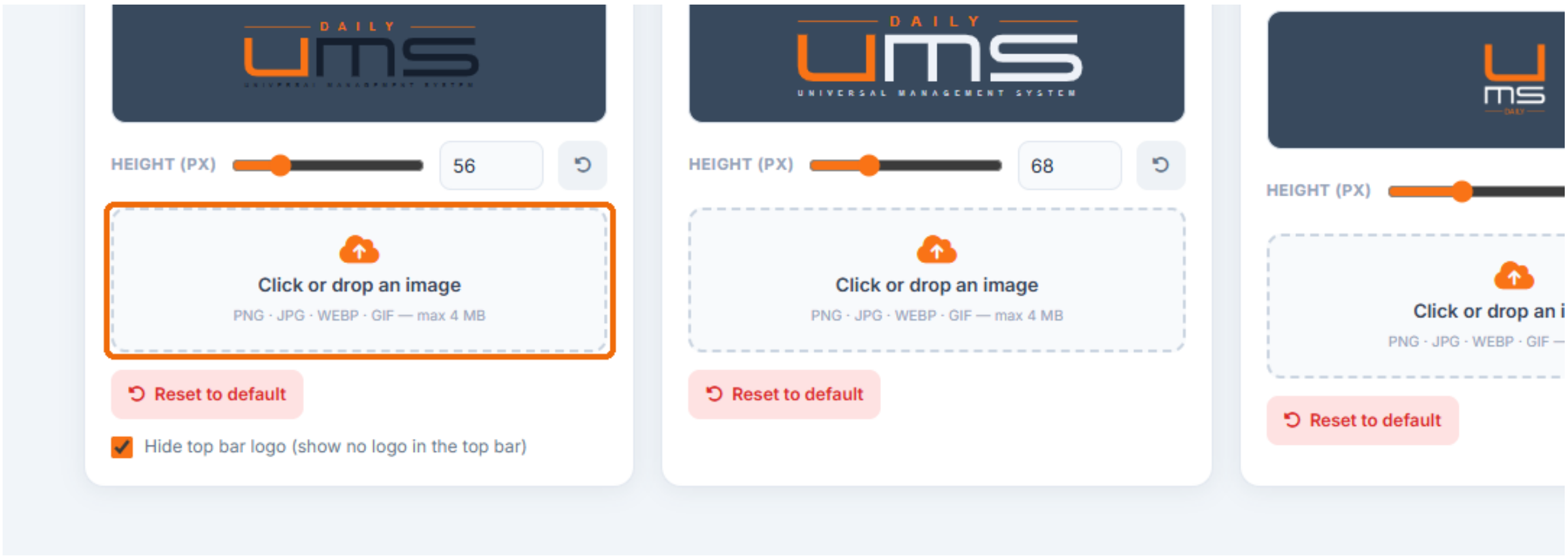
Default or custom



The badge in the top-right corner of each card tells you what is in use: DEFAULT means the built-in Daily UMS logo, CUSTOM means an image uploaded for this organization. In the demo the collapsed sidebar logo is custom and the other two are the defaults.

Branding (Logos)

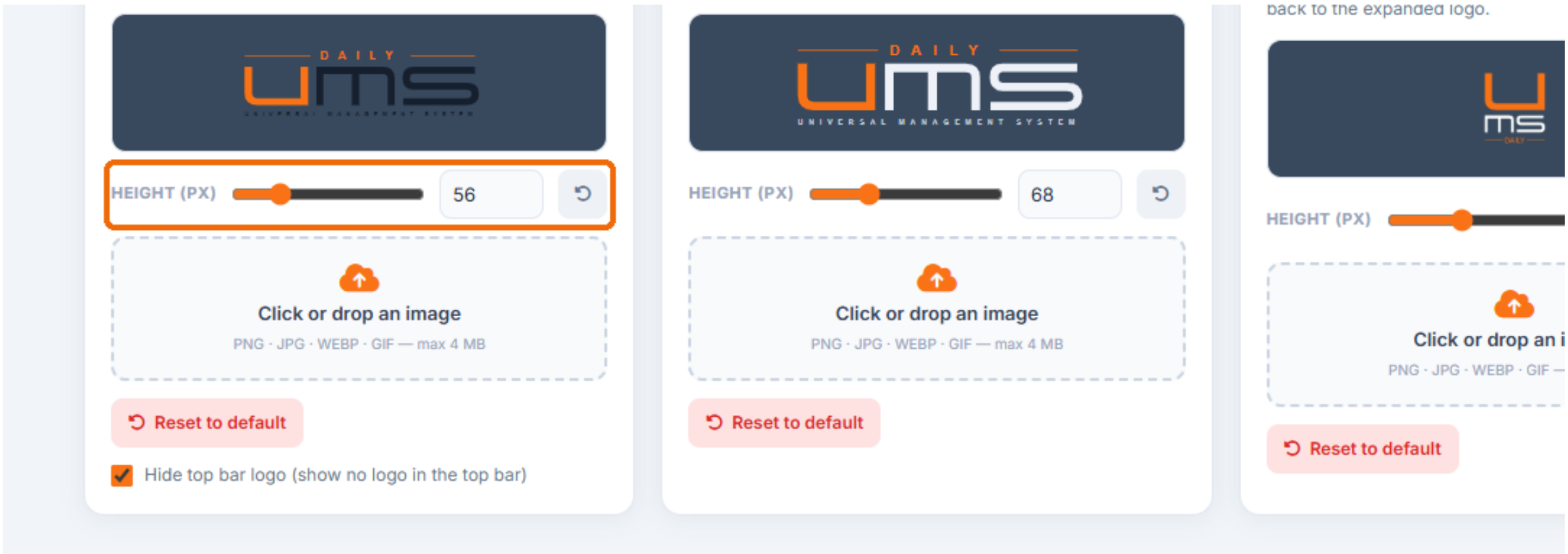
Upload a logo



Click Click or drop an image to choose a file, or drag a file from your computer onto the dashed box. PNG, JPG, WEBP and GIF images up to 4 MB are accepted. The image is uploaded and saved straight away, the preview updates and the badge changes to CUSTOM. A wide logo on a transparent background looks best on the dark bars.

Branding (Logos)

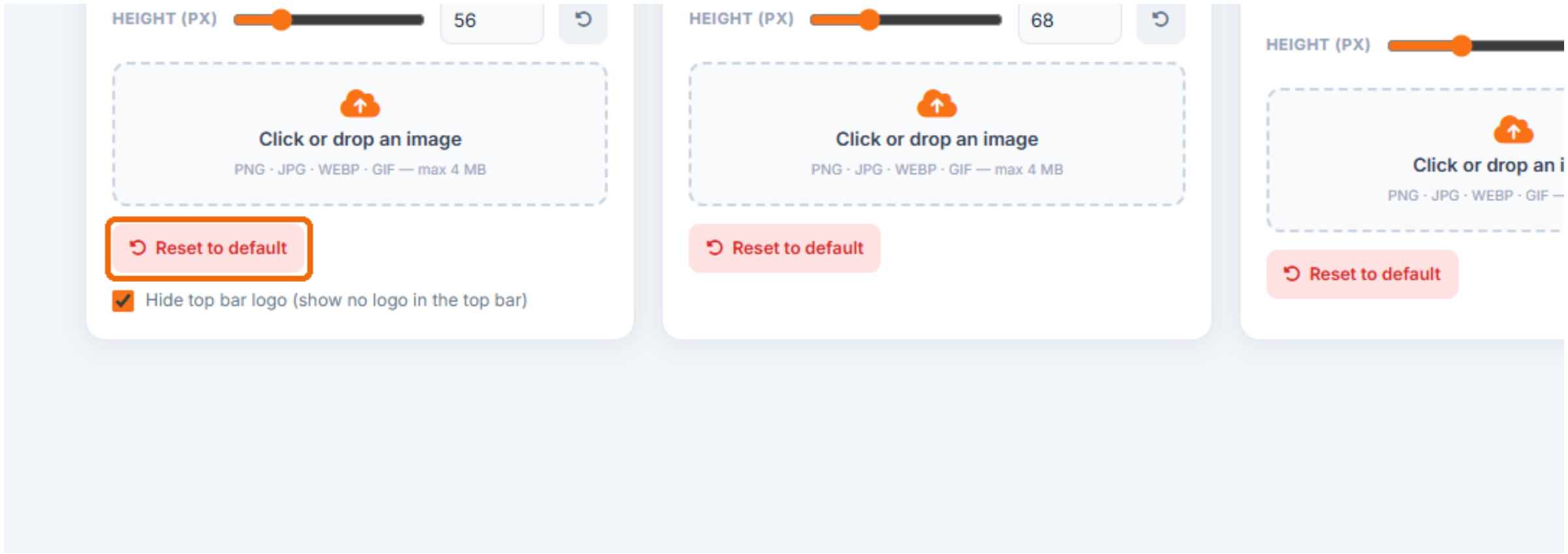
Logo height



HEIGHT (PX) sets how tall the logo is drawn. Drag the slider or type a number; the preview follows at once and the size is saved automatically a moment after you stop. The round-arrow button next to the number restores the default height for that slot.

Branding (Logos)

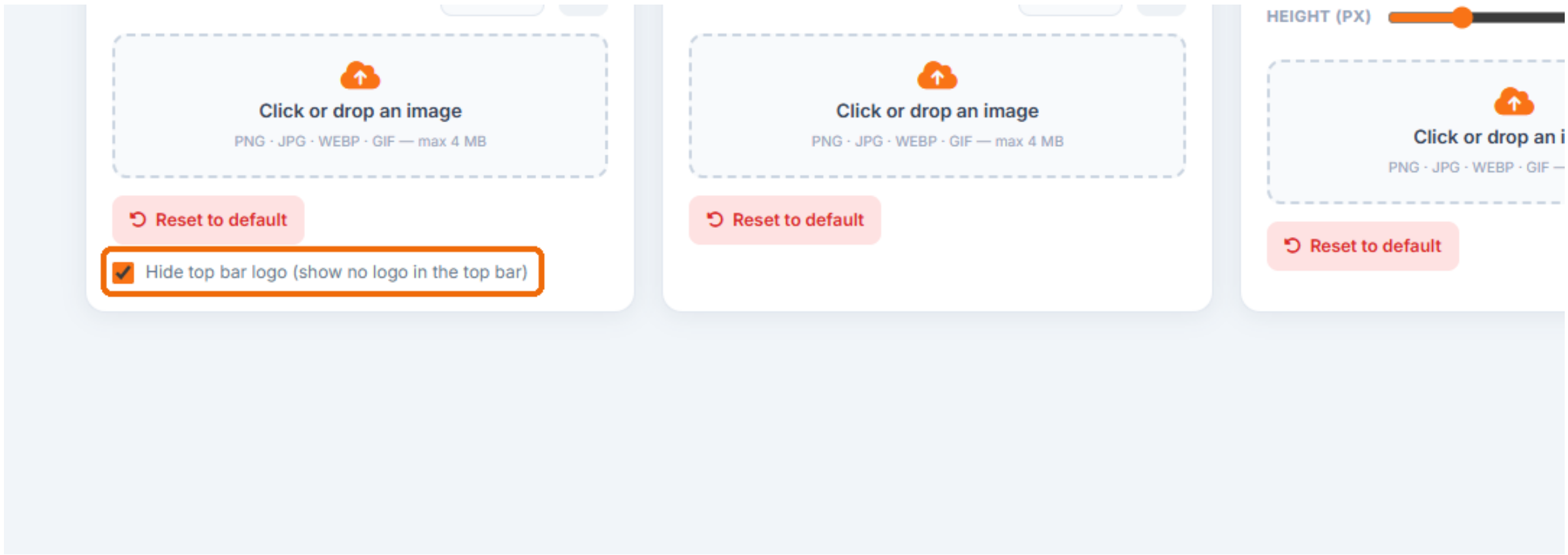
Reset to default



Reset to default deletes the uploaded image for that slot and goes back to the built-in Daily UMS logo. It takes effect immediately, without a confirmation, so keep a copy of your logo file in case you want it back.

Branding (Logos)

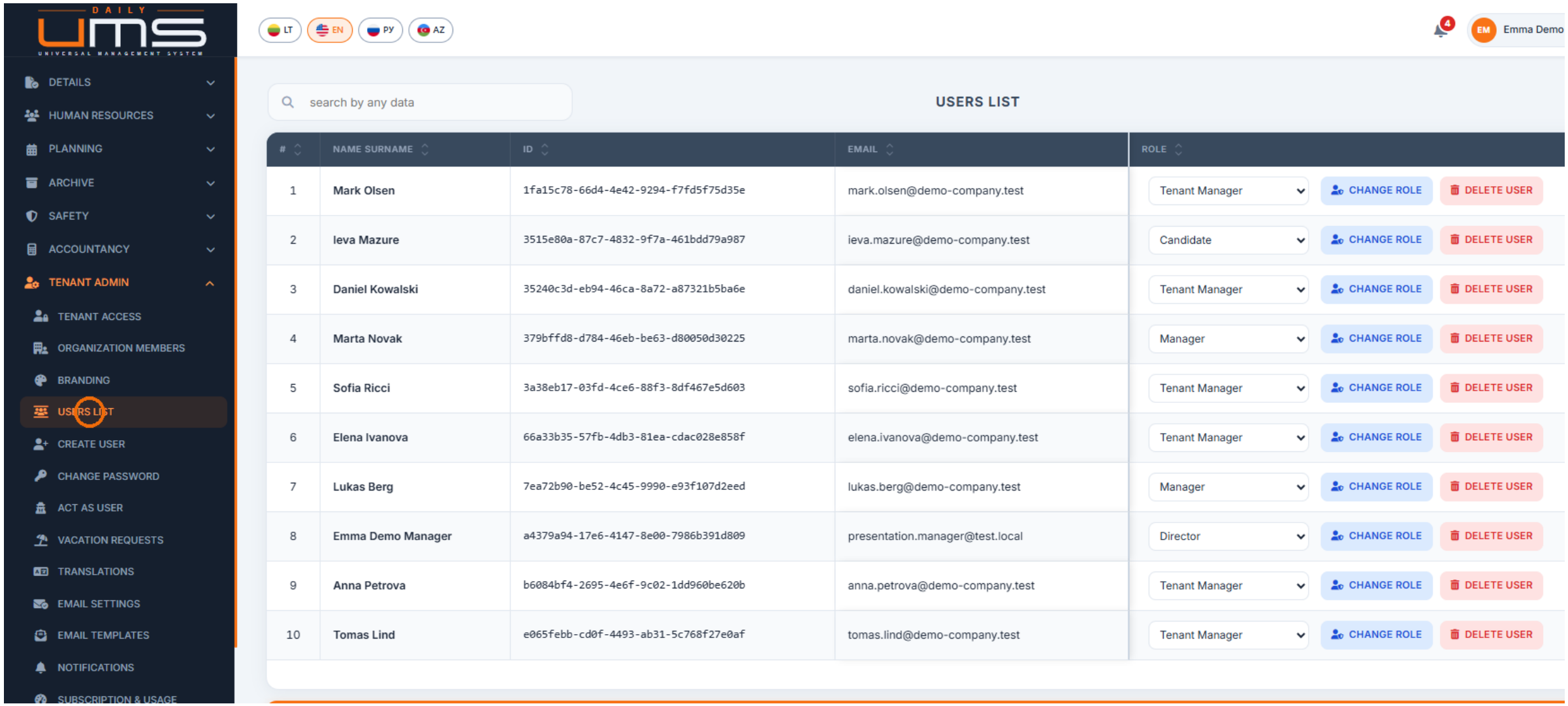
Hide the top bar logo



The Top Bar Logo card has one extra option: Hide top bar logo (show no logo in the top bar). It is ticked in the demo, which is why the top bar starts with the language buttons. Untick it to show the logo again. Like every change on this page, it is saved as soon as you click.

Users List

Open Users List



Open Tenant Admin > Users List in the side menu. Every row is one login (user account) of the current organization, with the person's name, the account ID, the email used to sign in and the person's role in this organization. Names and emails in this lesson are demo placeholders.

Users List

Search and sort

search by any data

USERS LIST

#	NAME SURNAME	ID	EMAIL	ROLE
1	Mark Olsen	1fa15c78-66d4-4e42-9294-f7fd5f75d35e	mark.olsen@demo-company.test	Tenar
2	Ieva Mazure	3515e80a-87c7-4832-9f7a-461bdd79a987	ieva.mazure@demo-company.test	Candi
3	Daniel Kowalski	35240c3d-eb94-46ca-8a72-a87321b5ba6e	daniel.kowalski@demo-company.test	Tenar
4	Marta Novak	379bffd8-d784-46eb-be63-d80050d30225	marta.novak@demo-company.test	Mana

Type in search by any data to filter the rows by name, ID, email or role. Click a column header with arrows (#, NAME SURNAME, ID, EMAIL, ROLE) to sort by that column; click again to reverse the order.

Users List

Login details

search by any data

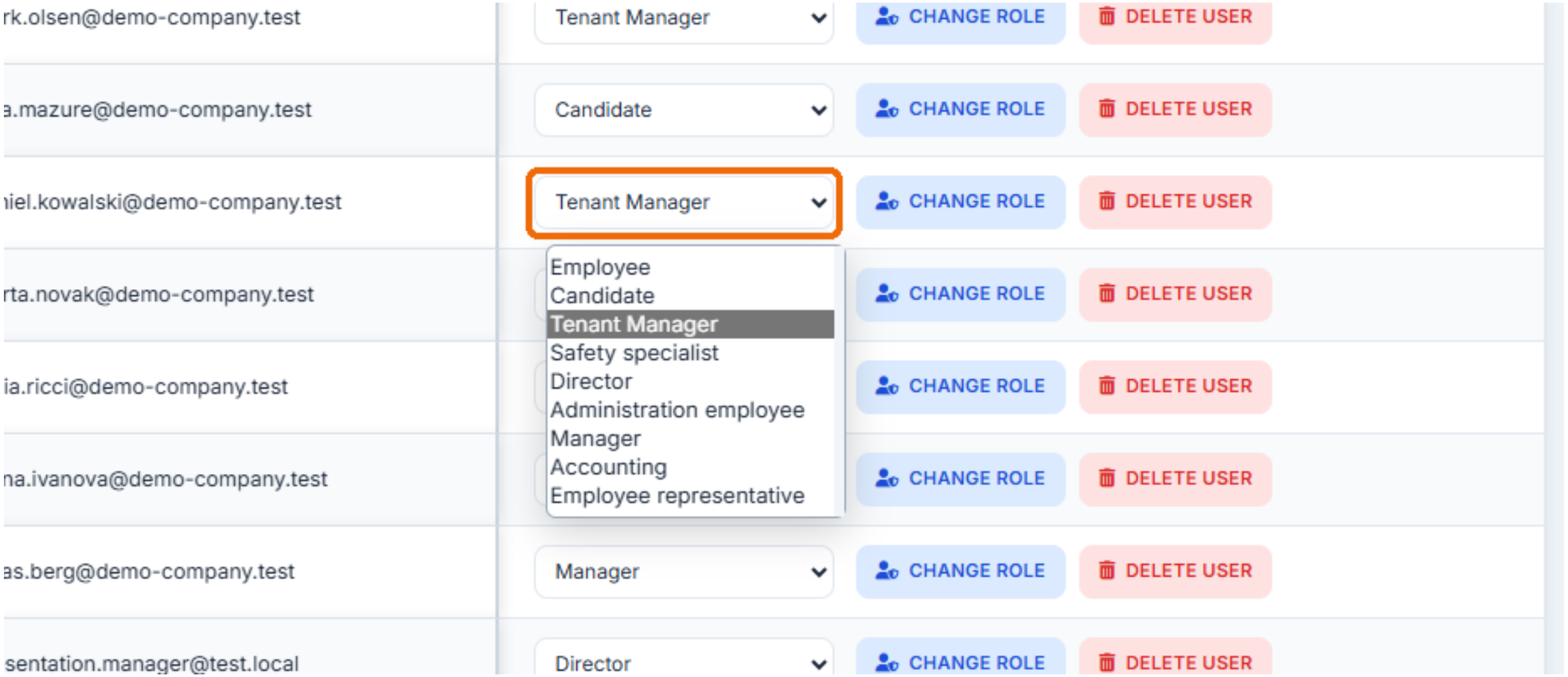
USERS LIST

#	NAME SURNAME	ID	EMAIL	ROLE
1	Mark Olsen	1fa15c78-66d4-4e42-9294-f7fd5f75d35e	mark.olsen@demo-company.test	Tenant Manager CHANGE ROLE
2	Ieva Mazure	3515e80a-87c7-4832-9f7a-461bdd79a987	ieva.mazure@demo-company.test	Candidate CHANGE ROLE
3	Daniel Kowalski	35240c3d-eb94-46ca-8a72-a87321b5ba6e	daniel.kowalski@demo-company.test	Tenant Manager CHANGE ROLE
4	Marta Novak	379bffd8-d784-46eb-be63-d80050d30225	marta.novak@demo-company.test	Manager CHANGE ROLE
5	Sofia Ricci	3a38eb17-03fd-4ce6-88f3-8df467e5d603	sofia.ricci@demo-company.test	Tenant Manager CHANGE ROLE
6	Elena Ivanova	66a33b35-57fb-4db3-81ea-cdac028e858f	elena.ivanova@demo-company.test	Tenant Manager CHANGE ROLE

NAME SURNAME comes from the person's profile. ID is the unique, permanent number of the login; quote it when you report a problem with an account. EMAIL is the address the person uses to sign in and to receive password and notification emails.

Users List

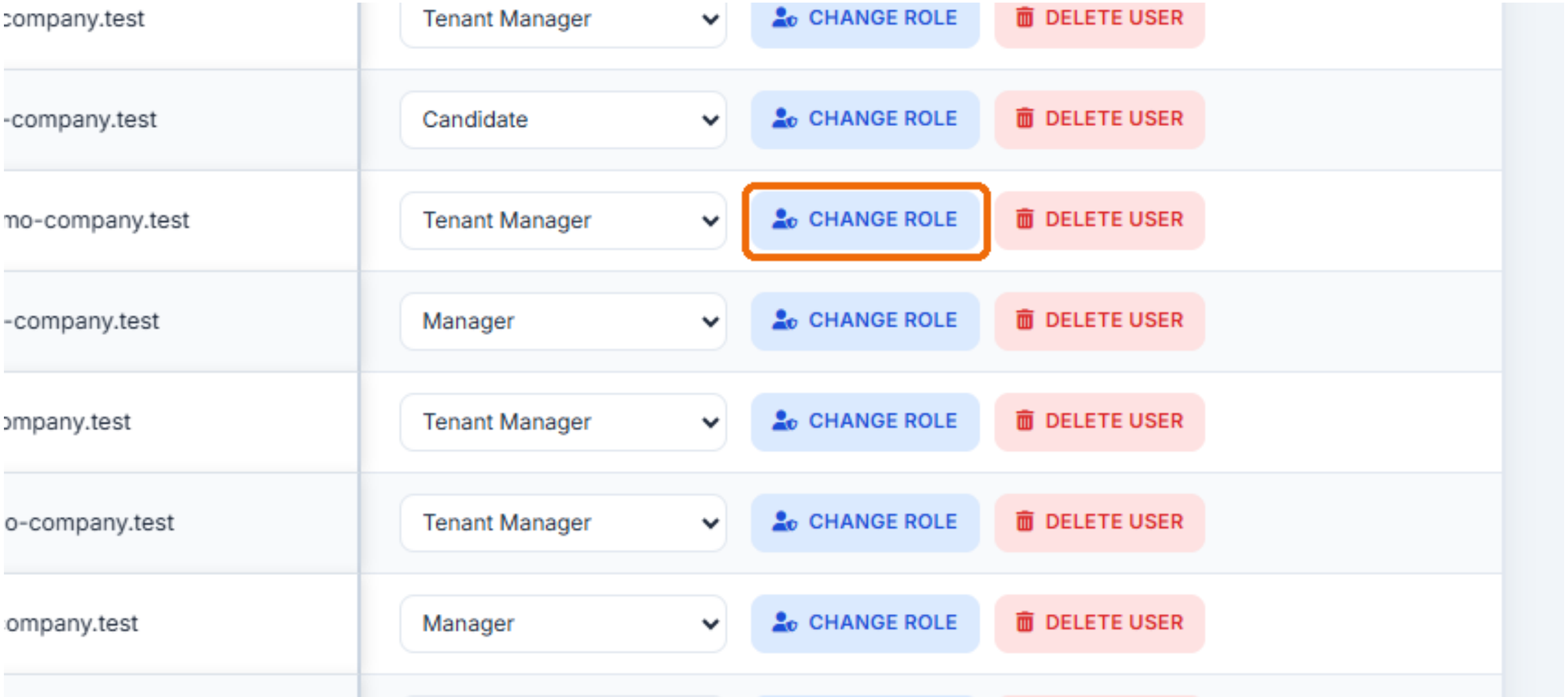
Pick a new role



The ROLE drop-down shows the person's current role in this organization. Open it and choose another role, for example Employee, Manager, Director or Tenant Manager. Choosing a role does not save it yet. Each person has one role per organization on this page; use Organization Members if someone needs several roles.

Users List

Change role

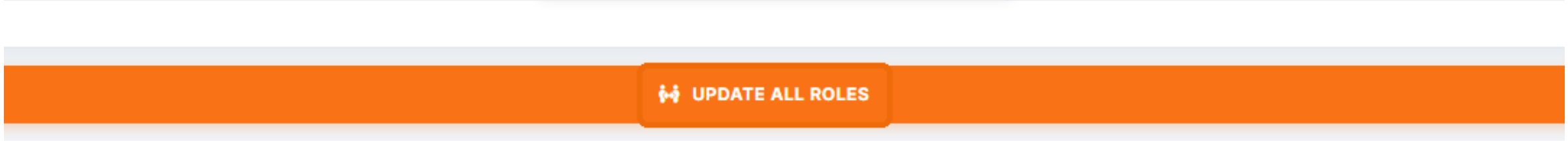


Press CHANGE ROLE in the same row to save the selected role. The new role replaces the person's previous role in this organization and decides which pages they can open (see Tenant Access). The person sees the change the next time a page loads.

Users List

Update all roles

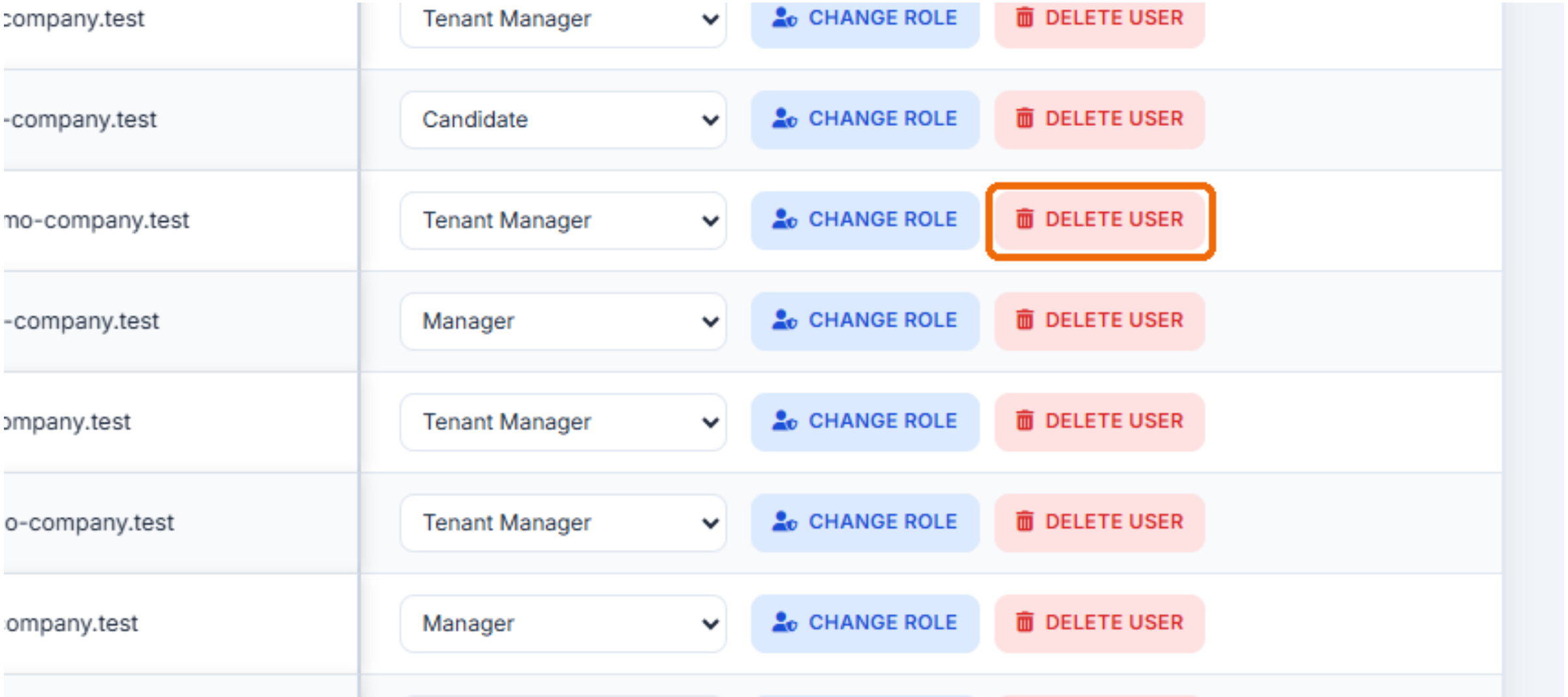




If you changed the role drop-down in several rows, press the orange UPDATE ALL ROLES bar below the table instead of pressing CHANGE ROLE in each row. Only rows whose role really changed are saved; logins outside your organization are skipped.

Users List

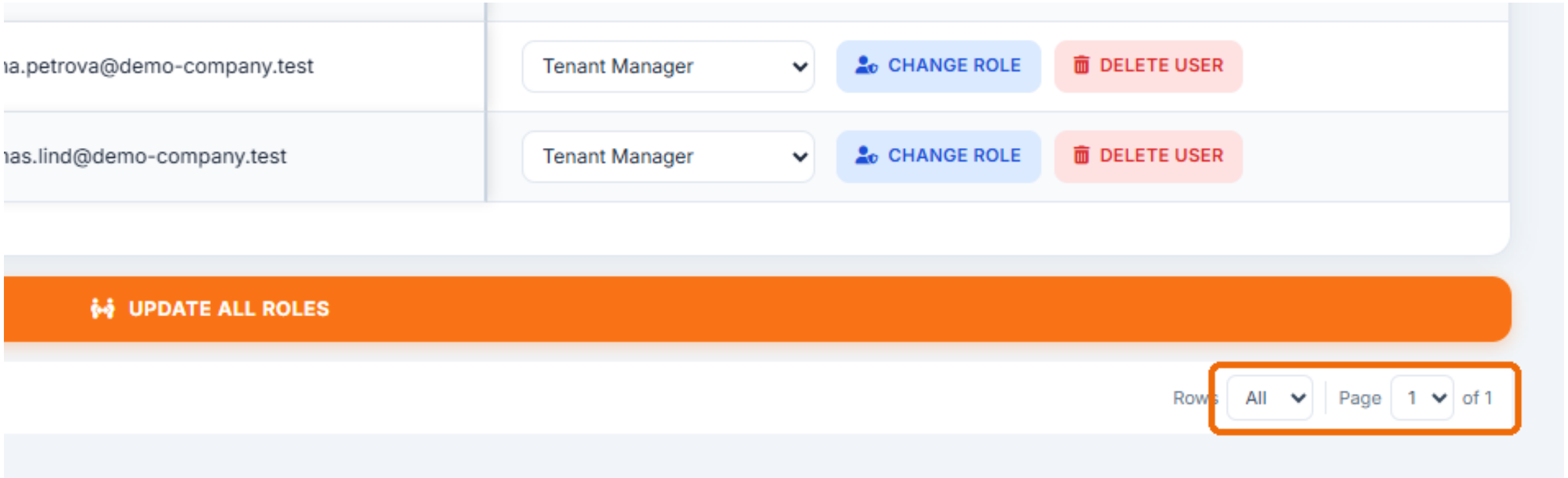
Delete user



DELETE USER asks for confirmation and then removes the login from the current organization: the membership is closed and the person's roles here are removed, so they can no longer work in this organization. The person's records and their access to other organizations stay. You cannot delete your own account.

Users List

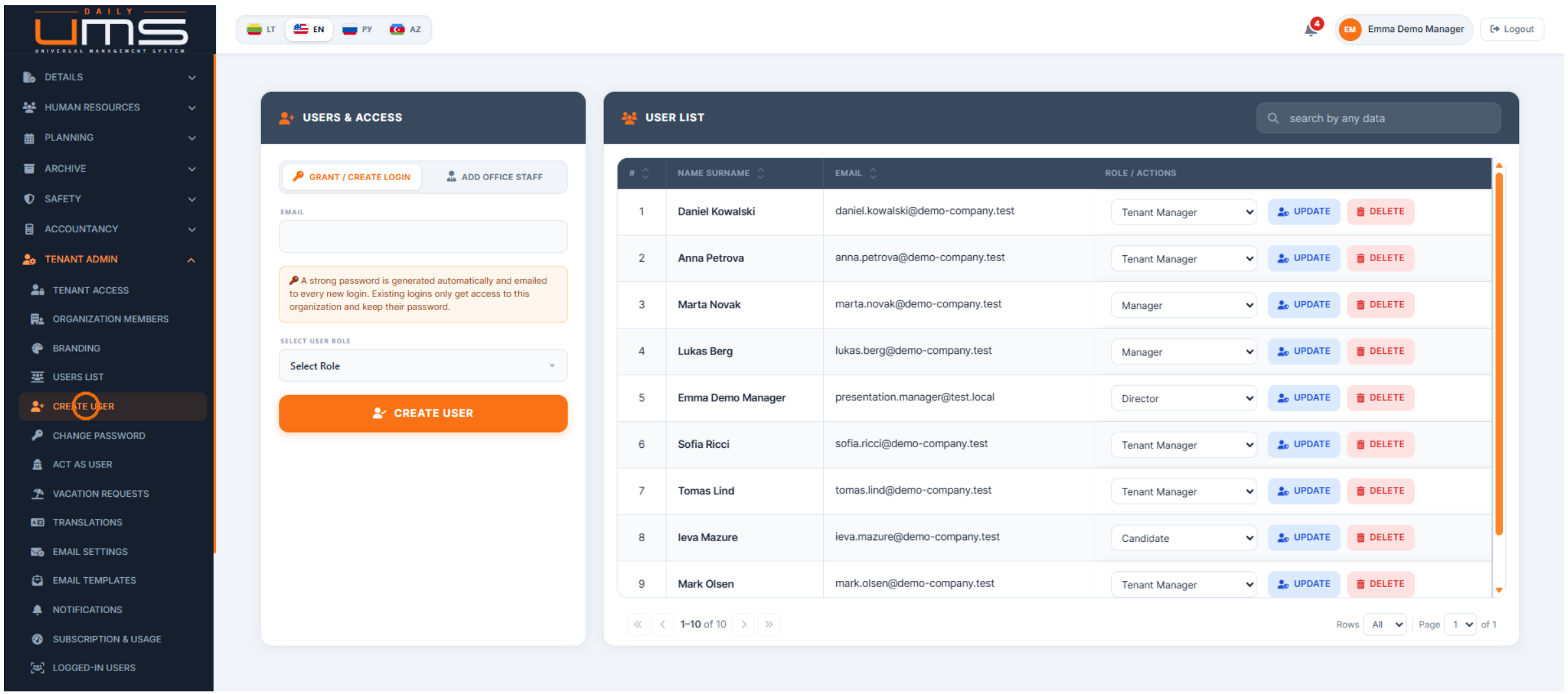
Rows and pages



Use Rows at the bottom right to choose how many logins are listed per page (All shows everything), and Page or the arrow buttons at the bottom left to move between pages. New logins are created on the Create User page.

Create User

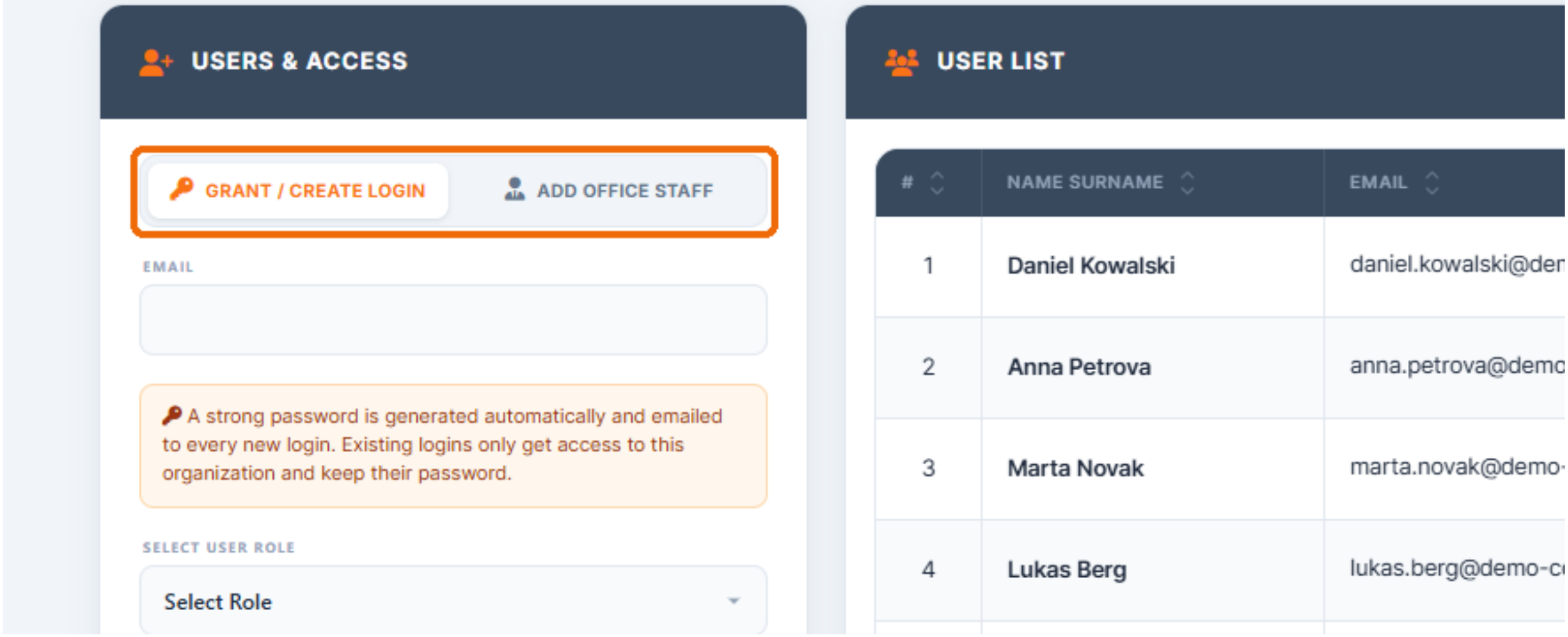
Open Create User



Open Tenant Admin > Create User in the side menu. The USERS & ACCESS panel on the left creates new logins for the current organization. The USER LIST panel on the right shows the logins that already exist, so you can check whether someone already has an account. Names and emails in this lesson are demo placeholders.

Create User

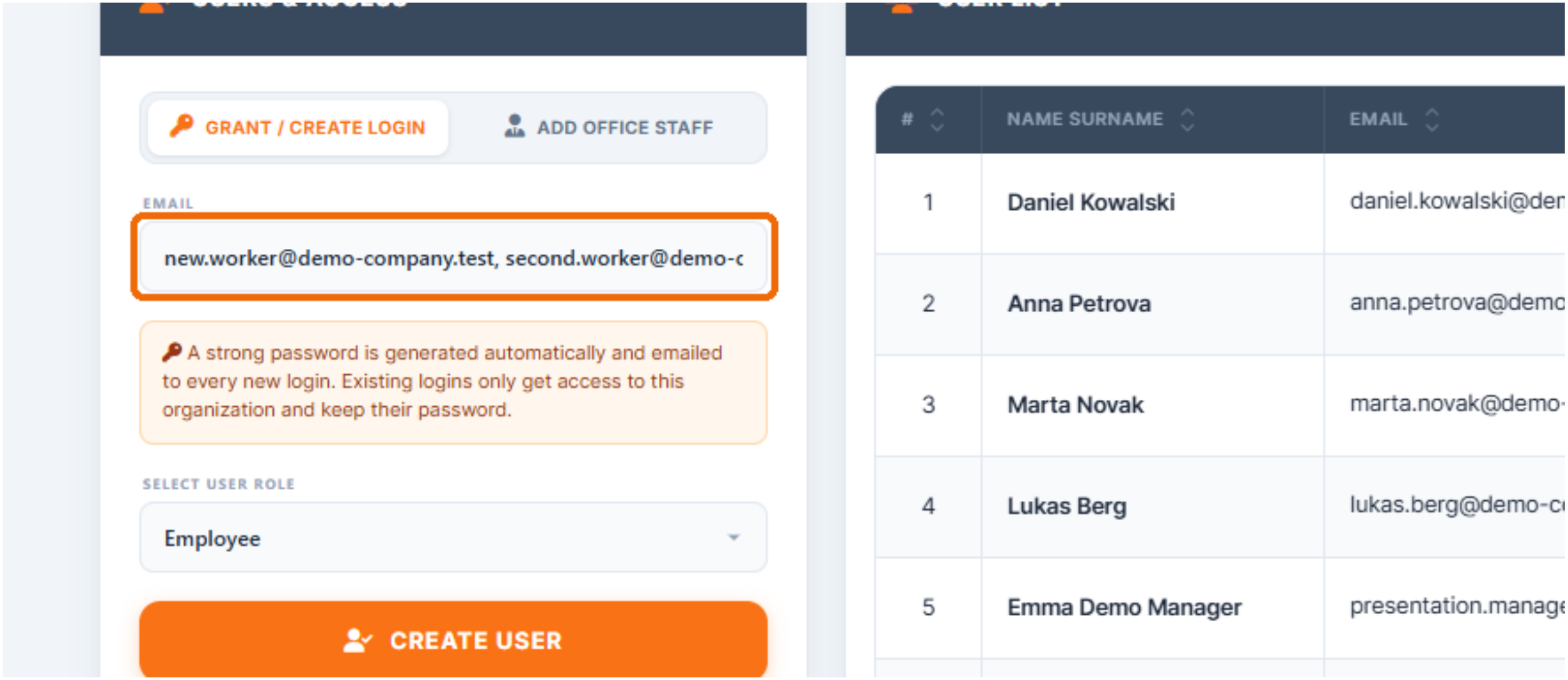
Choose who you are adding



There are two tabs. GRANT / CREATE LOGIN gives a login to workers and candidates whose profile is already in the system (or will be created through onboarding). ADD OFFICE STAFF creates an office worker, manager or director: the office profile and the login are created together, with no candidate onboarding.

Create User

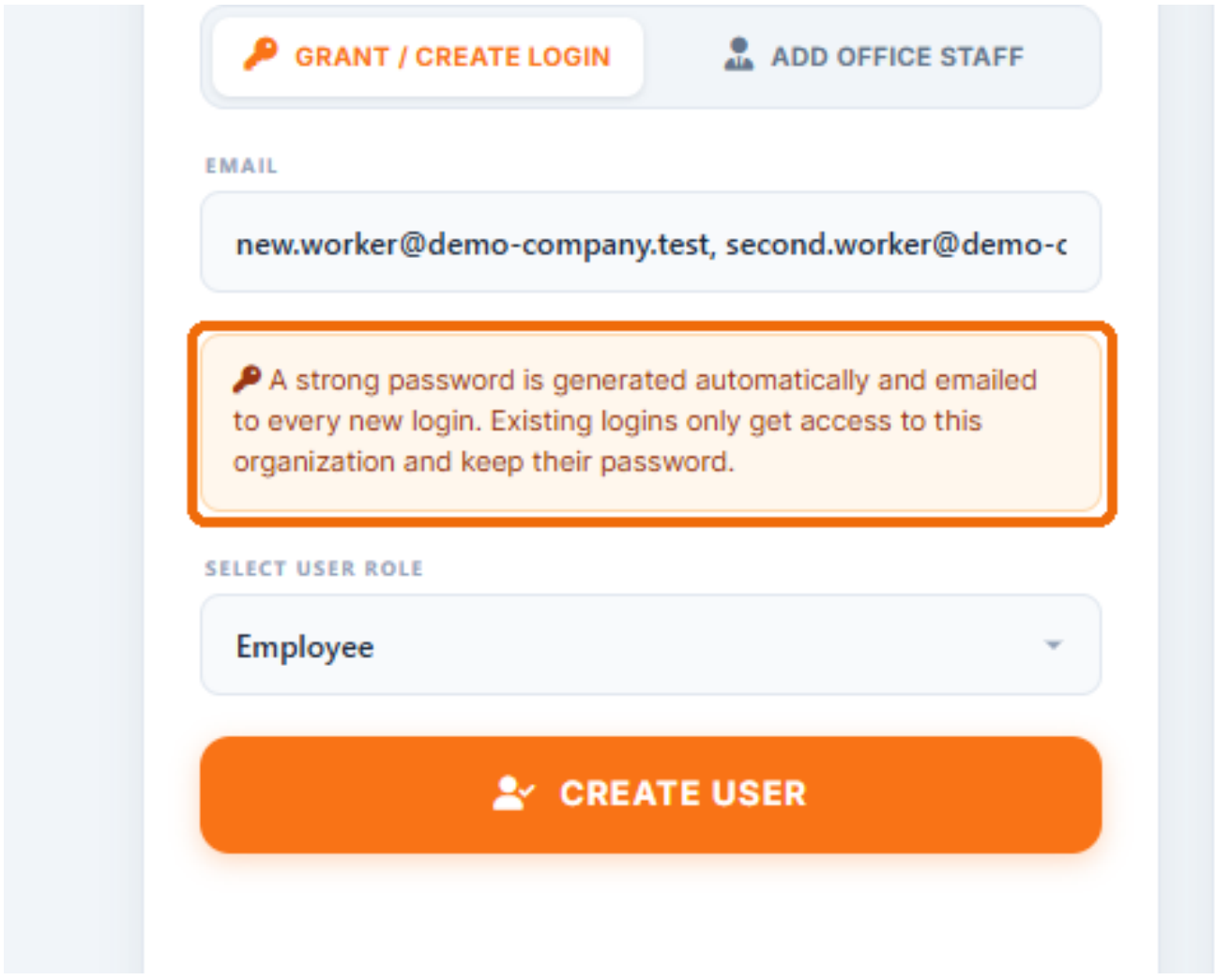
Enter one or more emails

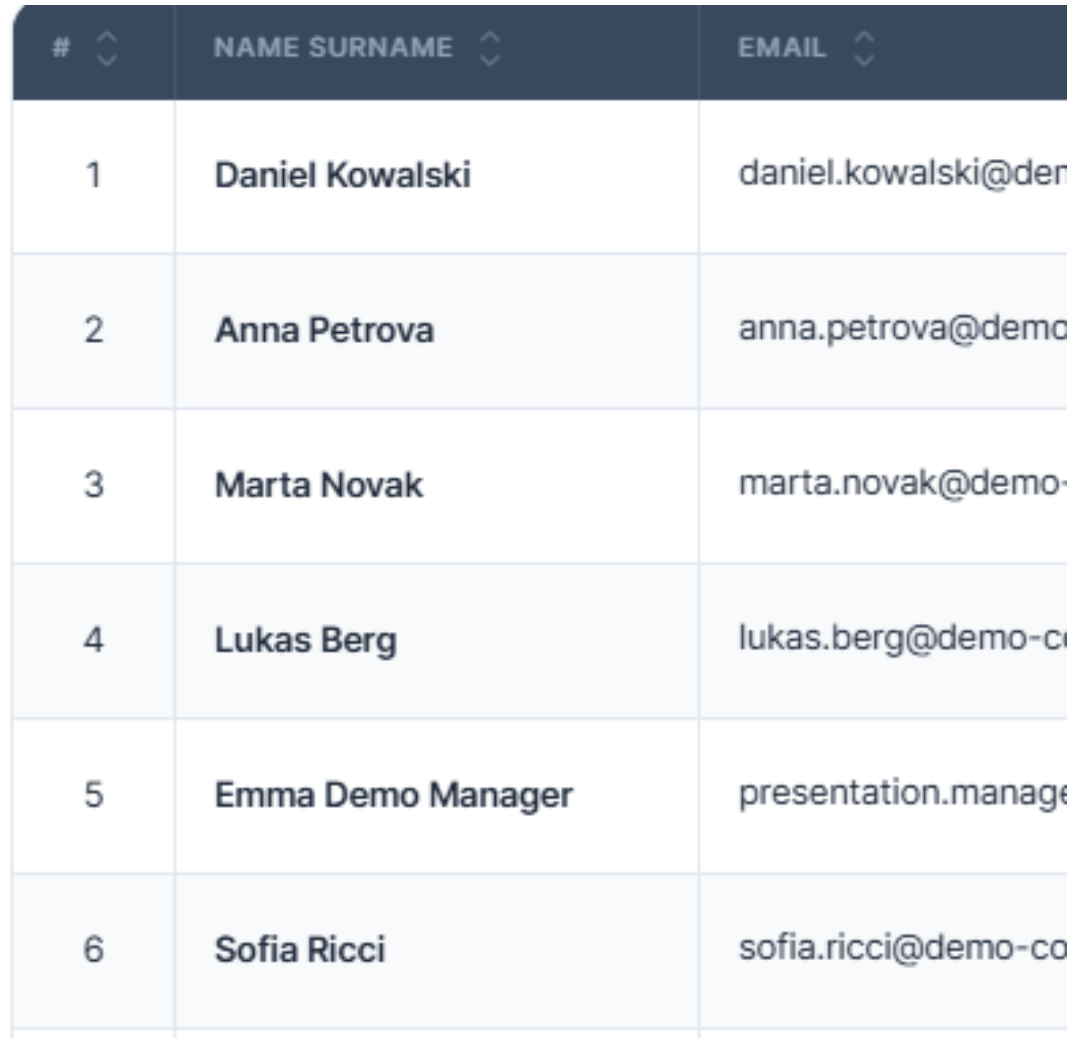


In EMAIL type the address the person will sign in with. To create several logins with the same role in one go, separate the addresses with commas, for example new.worker@demo-company.test, second.worker@demo-company.test. Each address is processed separately.

Create User

Password is automatic

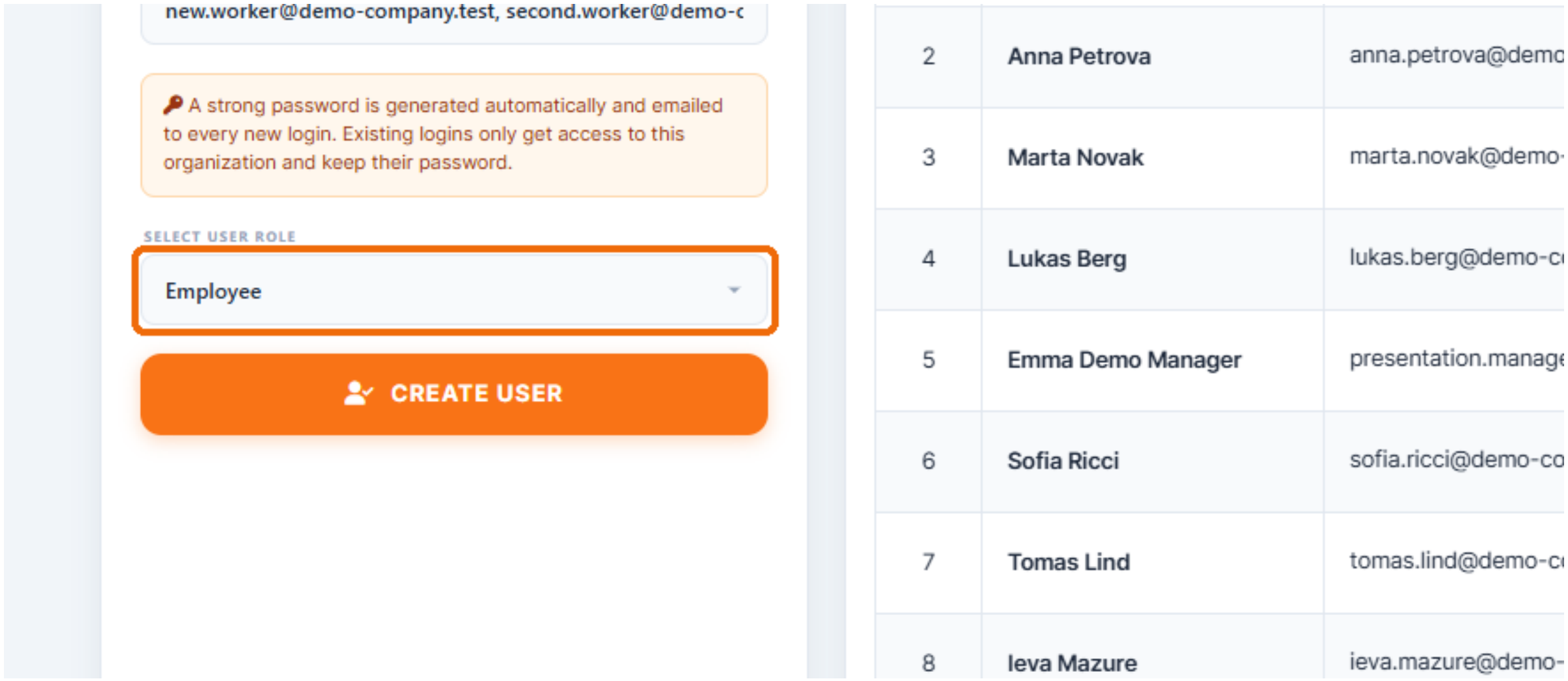




There are no password fields. As the orange note says, the app creates a strong random password for every new login and emails it to the person together with the sign-in link, so you never have to choose or send passwords yourself. Existing logins only get access to this organization and keep the password they already have.

Create User

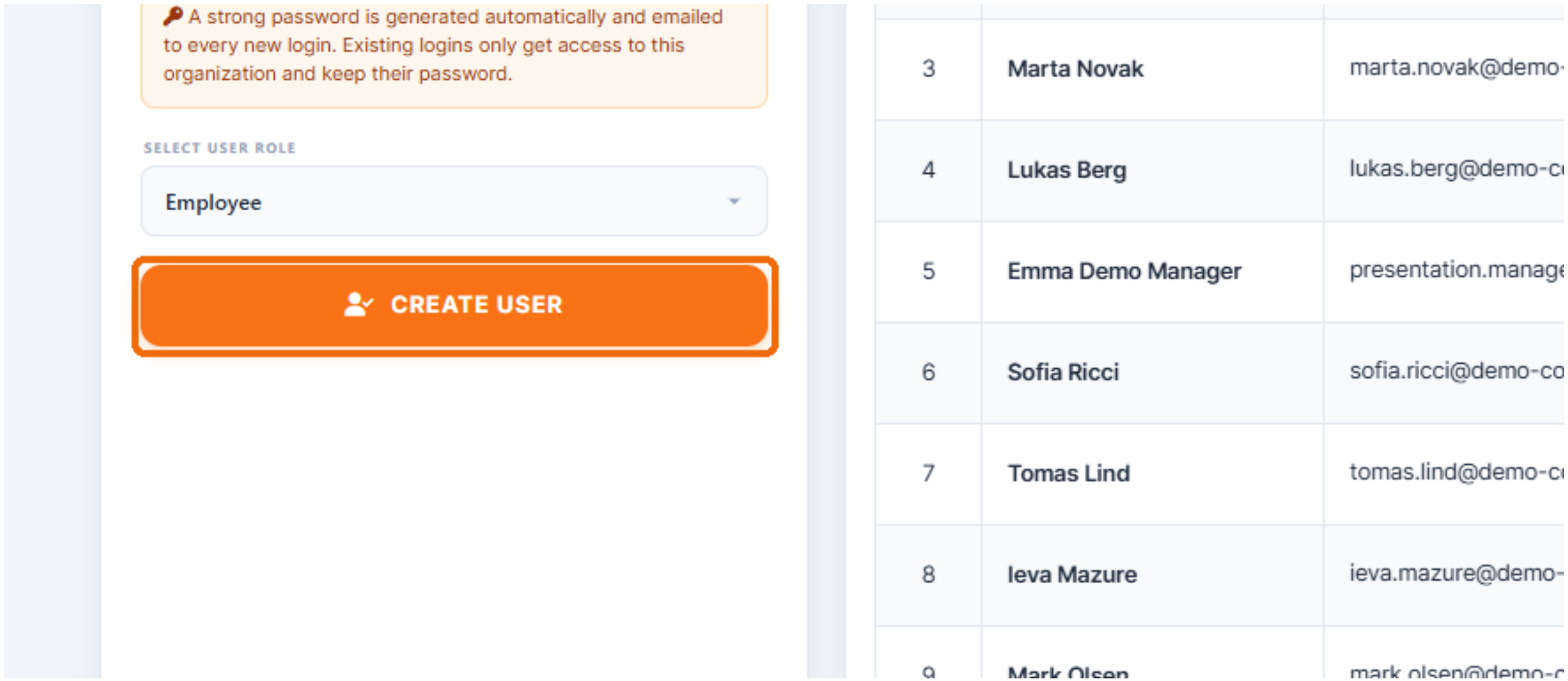
Select the role



SELECT USER ROLE decides what the new people can open in this organization (see Tenant Access). Typical choices are Employee for workers and Candidate for people still in onboarding. The role is set for the organization you are currently working in.

Create User

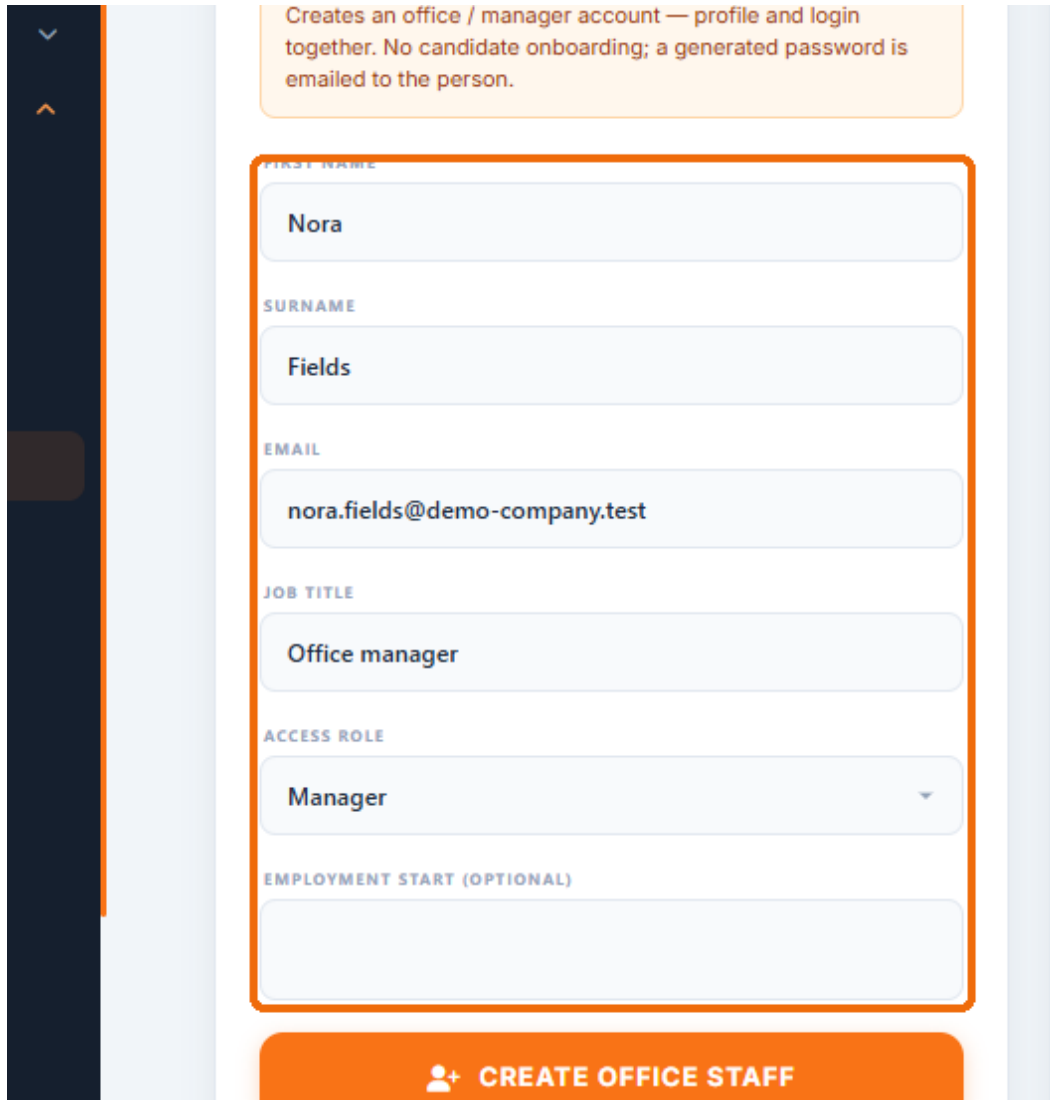
Create the logins



Press CREATE USER. A new email gets a new login with the selected role and an email with its password. If an email already has a login (for example the person works for another organization too), no new account is made: the existing login is simply given access to this organization with the selected role and its password stays the same. The result for every email (created, granted or skipped) is shown at the top of the panel.

Create User

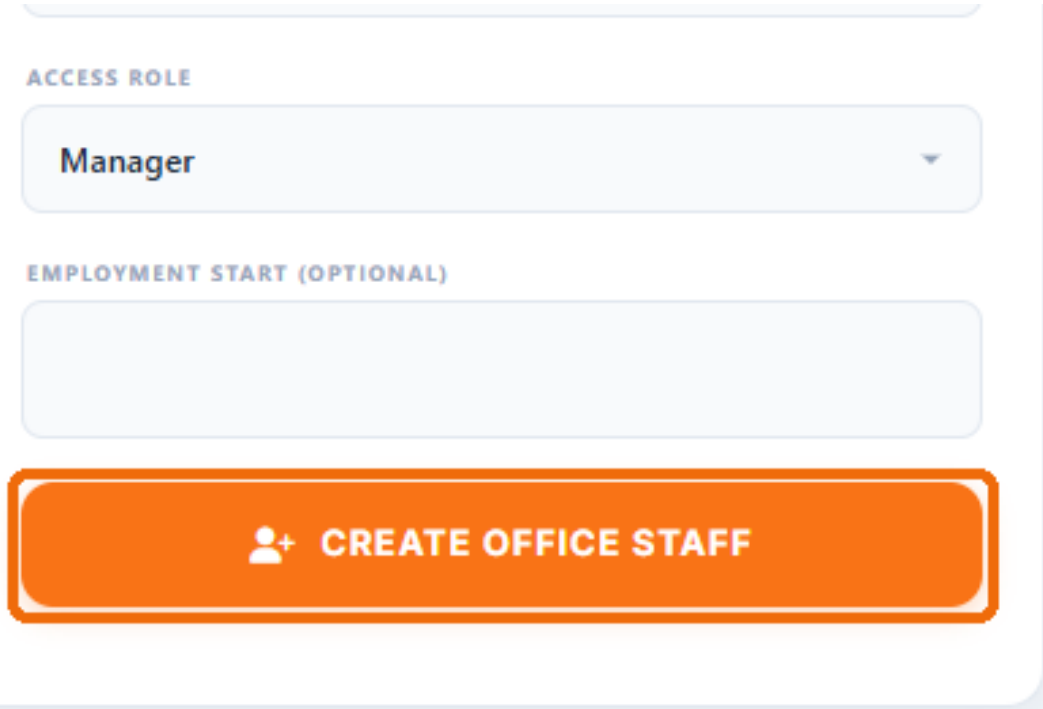
Add office staff



On the ADD OFFICE STAFF tab fill in First name, Surname, Email, Job title and Access role (for example Manager or Director). Employment start is optional. As the orange note says, the office profile and the login are created together and a generated password is emailed to the person.

Create User

Create office staff

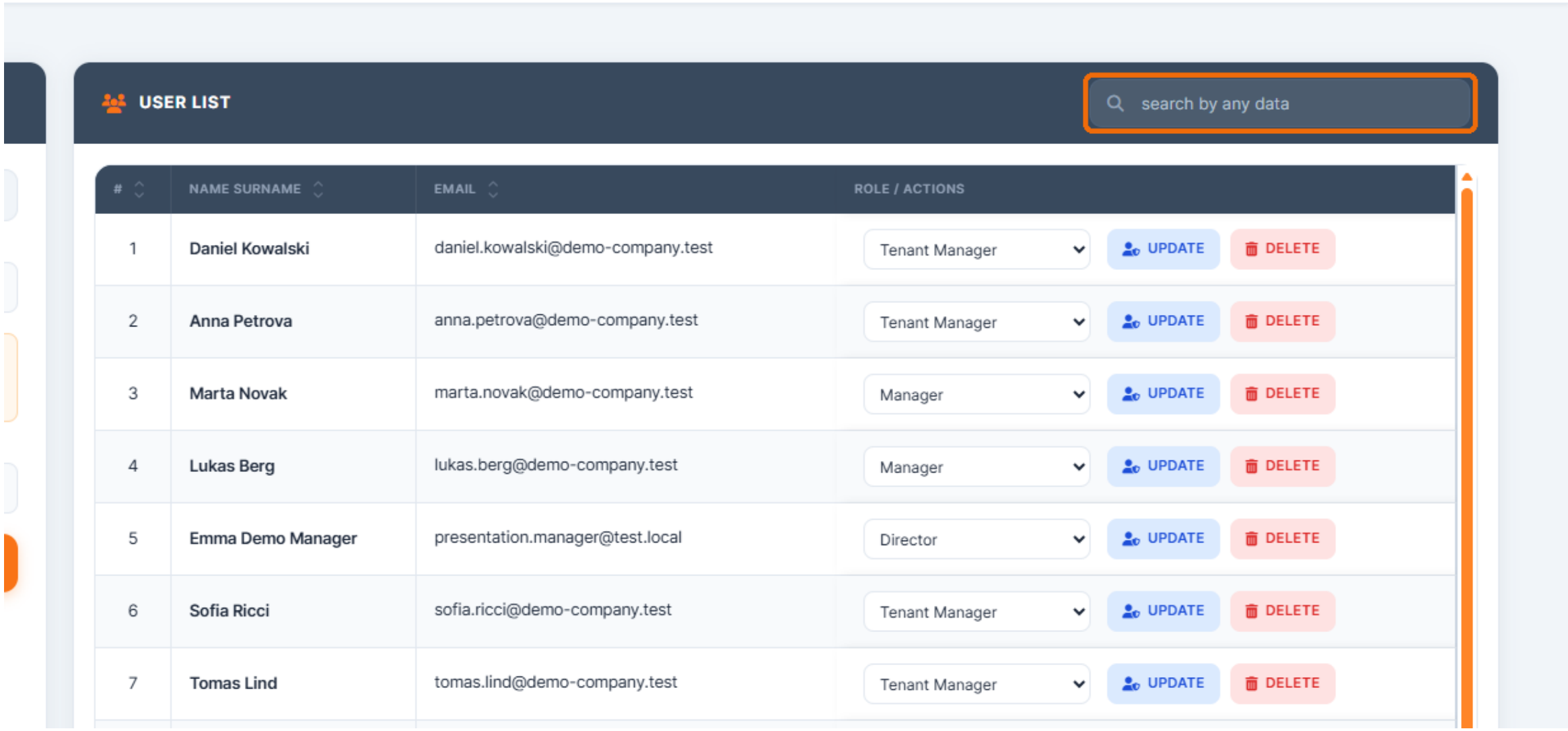




Press CREATE OFFICE STAFF to create the person in the current organization. They appear in the user list on the right and can sign in with the password from the email. Use this tab instead of candidate onboarding for people who work in the office.

Create User

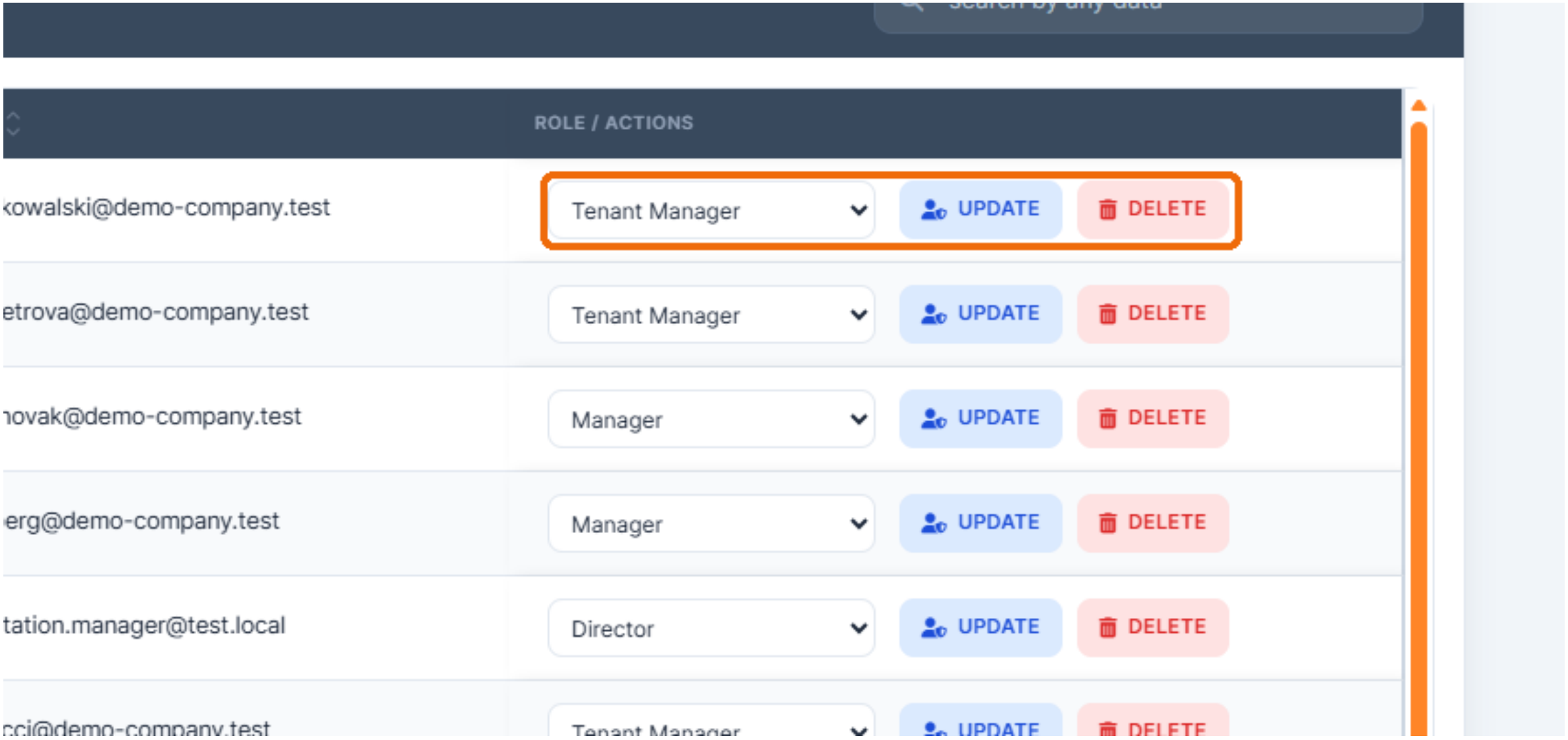
Existing users



The USER LIST panel lists the existing logins of the organization with name, email and role. Type in search by any data to filter it, and click the column arrows to sort. Check here before creating a login, to avoid creating a duplicate for someone who already has one.

Create User

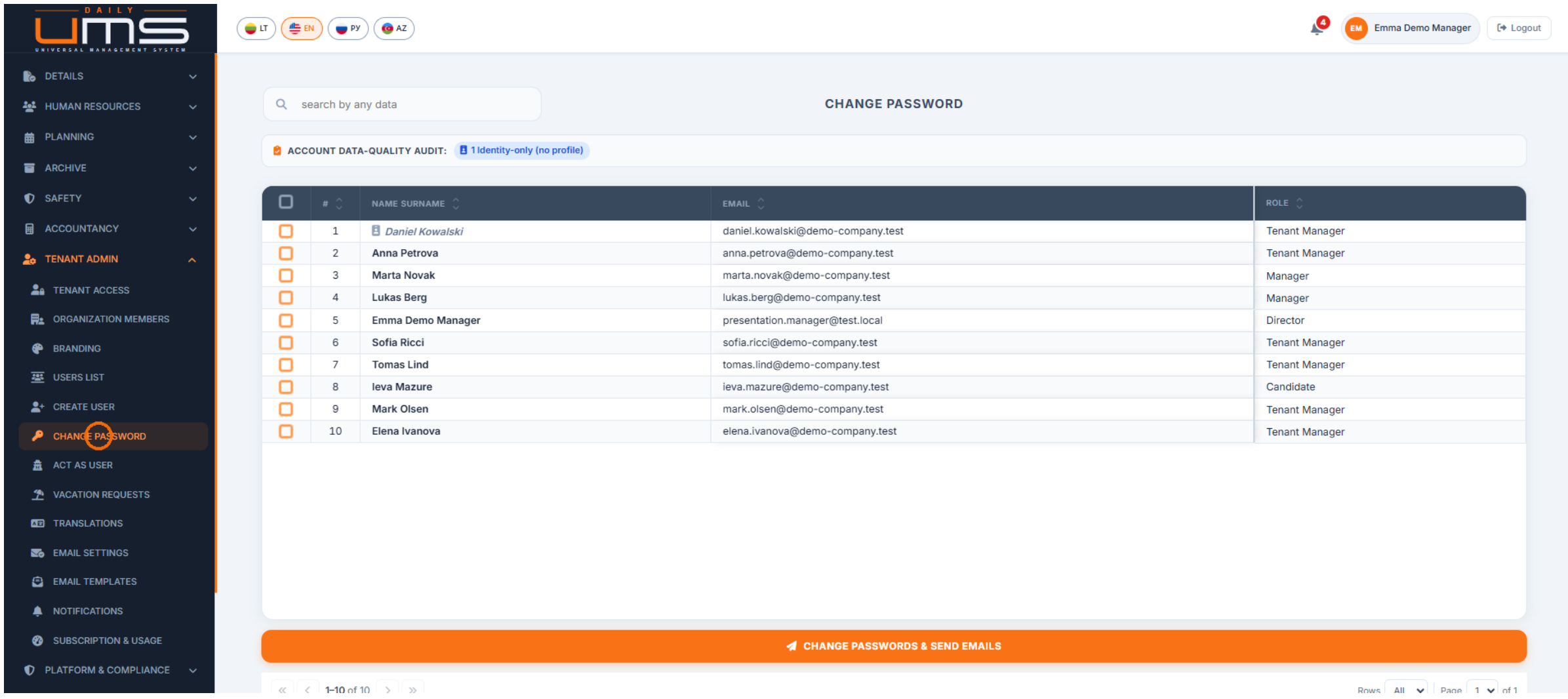
Update or delete



Each row has a role drop-down with UPDATE and DELETE. Pick another role and press UPDATE to save it. DELETE removes the login from this organization after a confirmation; the same actions are also available on the Users List page.

Change Password

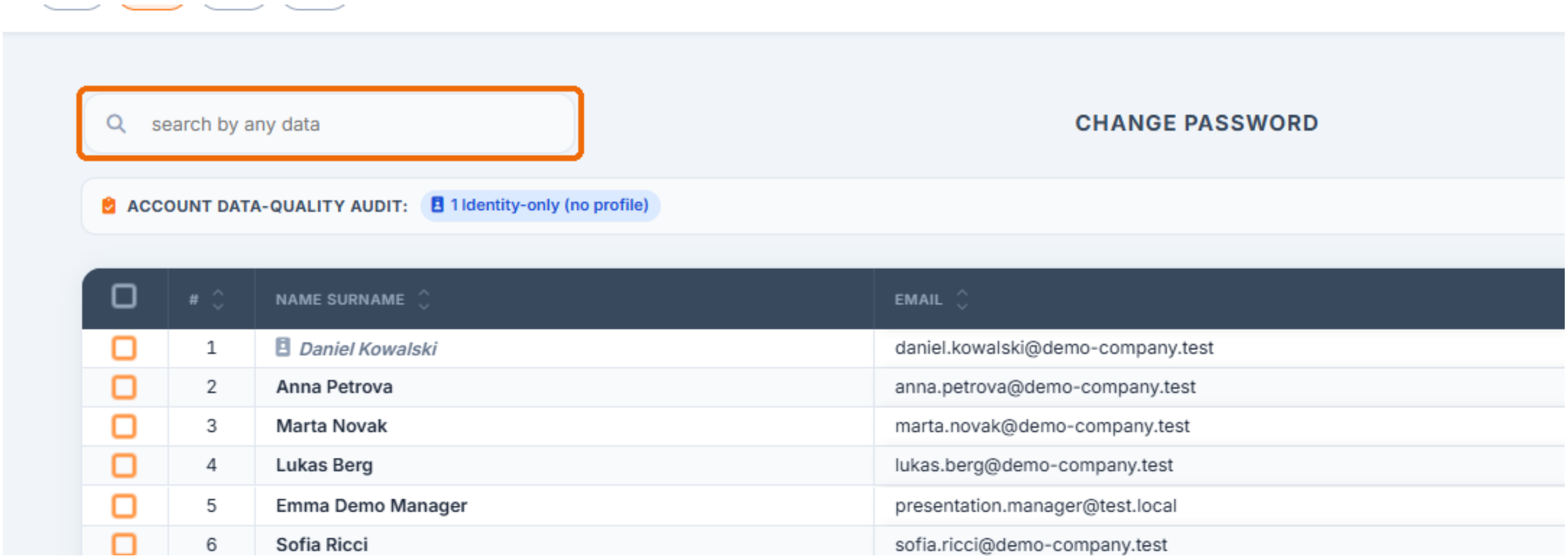
Open Change Password



Open Tenant Admin > Change Password in the side menu. The page lists the logins of the current organization with name, email and role. Use it when people have forgotten their password, when you hand over new devices, or after a security incident. Names and emails in this lesson are demo placeholders.

Change Password

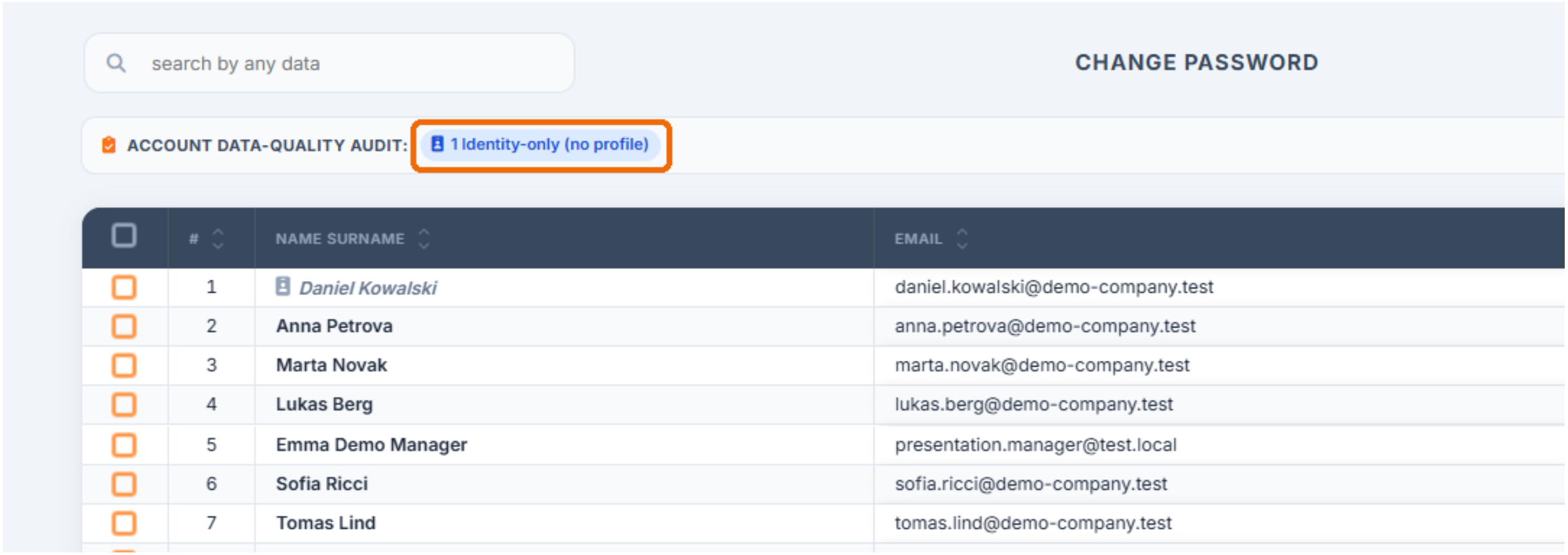
Find people



Type a name, email or role in search by any data to filter the list. Column headers with arrows can be clicked to sort. Rows at the bottom right chooses how many people are shown per page.

Change Password

Account data-quality audit



ACCOUNT DATA-QUALITY AUDIT appears when some logins have problems. Identity-only (no profile) counts logins without a worker or office profile. Other badges can show logins with an invalid email (they cannot receive a new password) or with no role. Fix these on Create User or Organization Members.

Change Password

Identity-only logins

ACCOUNT DATA-QUALITY AUDIT: 1 Identity-only (no profile)

#	NAME SURNAME	EMAIL
1	*Daniel Kowalski*	daniel.kowalski@demo-company.test
2	Anna Petrova	anna.petrova@demo-company.test
3	Marta Novak	marta.novak@demo-company.test
4	Lukas Berg	lukas.berg@demo-company.test
5	Emma Demo Manager	presentation.manager@test.local
6	Sofia Ricci	sofia.ricci@demo-company.test
7	Tomas Lind	tomas.lind@demo-company.test
8	Ieva Mazure	ieva.mazure@demo-company.test
9	Mark Olsen	mark.olsen@demo-company.test
10	Elena Ivanova	elena.ivanova@demo-company.test

In the list, a login without a profile is shown with a small badge icon and its name in italics. Its password can still be reset, but consider whether the account is still needed, or add a profile for the person.

Change Password

Select who

ACCOUNT DATA-QUALITY AUDIT: 1 Identity-only (no profile)

	#	NAME SURNAME	EMAIL
☐	1	*Daniel Kowalski*	daniel.kowalski@demo-company.test
☑	2	Anna Petrova	anna.petrova@demo-company.test
☑	3	Marta Novak	marta.novak@demo-company.test
☐	4	Lukas Berg	lukas.berg@demo-company.test
☐	5	Emma Demo Manager	presentation.manager@test.local
☐	6	Sofia Ricci	sofia.ricci@demo-company.test
☑	7	Tomas Lind	tomas.lind@demo-company.test
☐	8	Ieva Mazure	ieva.mazure@demo-company.test
☐	9	Mark Olsen	mark.olsen@demo-company.test
☐	10	Elena Ivanova	elena.ivanova@demo-company.test

Tick the box at the start of each row for every person who should get a new password. In the example three people are selected. Ticking a box changes nothing yet; you can untick again at any time.

Change Password

Select all

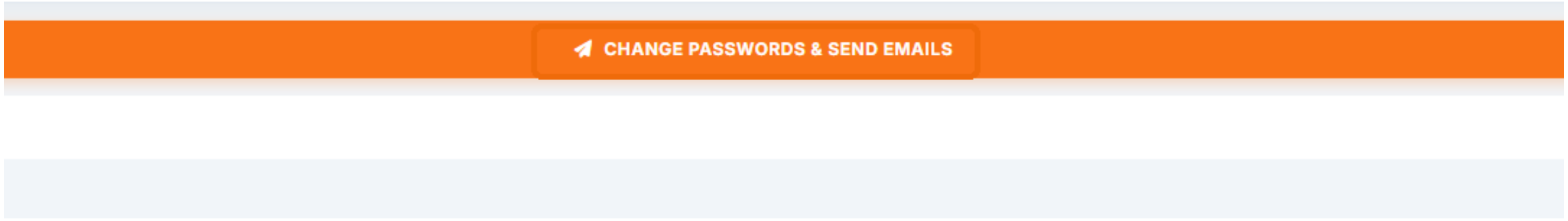
ACCOUNT DATA-QUALITY AUDIT: 1 Identity-only (no profile)

#	NAME SURNAME	EMAIL
1	*Daniel Kowalski*	daniel.kowalski@demo-company.test
2	Anna Petrova	anna.petrova@demo-company.test
3	Marta Novak	marta.novak@demo-company.test
4	Lukas Berg	lukas.berg@demo-company.test
5	Emma Demo Manager	presentation.manager@test.local
6	Sofia Ricci	sofia.ricci@demo-company.test
7	Tomas Lind	tomas.lind@demo-company.test
8	Ieva Mazure	ieva.mazure@demo-company.test
9	Mark Olsen	mark.olsen@demo-company.test
10	Elena Ivanova	elena.ivanova@demo-company.test

The checkbox in the table header selects all rows that are shown, or clears them again. Combine it with search to select, for example, everyone with a certain role. Check the selection carefully before you continue.

Change Password

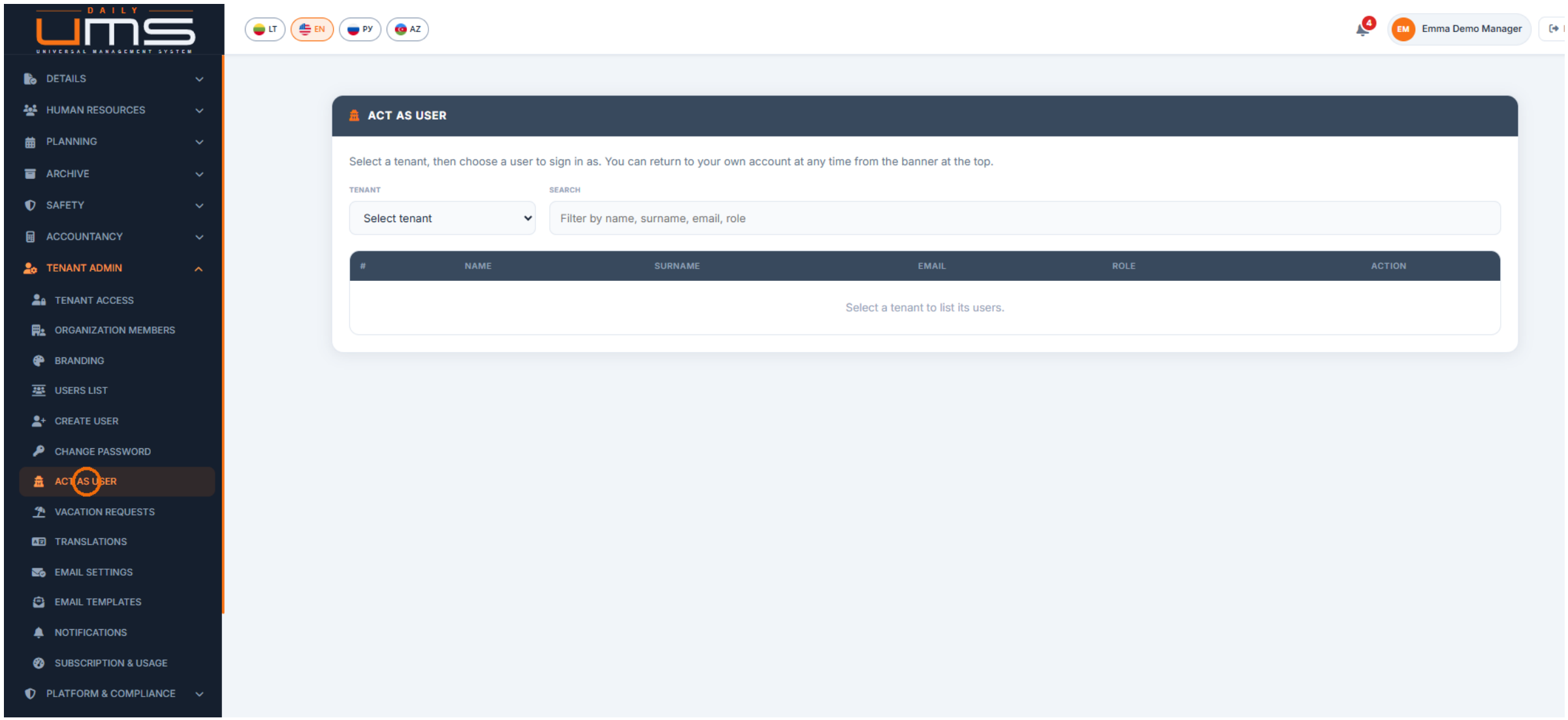
Reset and email



Press CHANGE PASSWORDS & SEND EMAILS. For every selected person the app creates a new strong password, replaces the old one at once and emails it using the password changed template. People with an invalid email address are skipped and keep their old password. There is no extra confirmation, so check the ticks first. Afterwards a summary at the top of the page lists each account: password changed and email sent, skipped, or changed but the email failed (then send that person a new reset).

Act As User

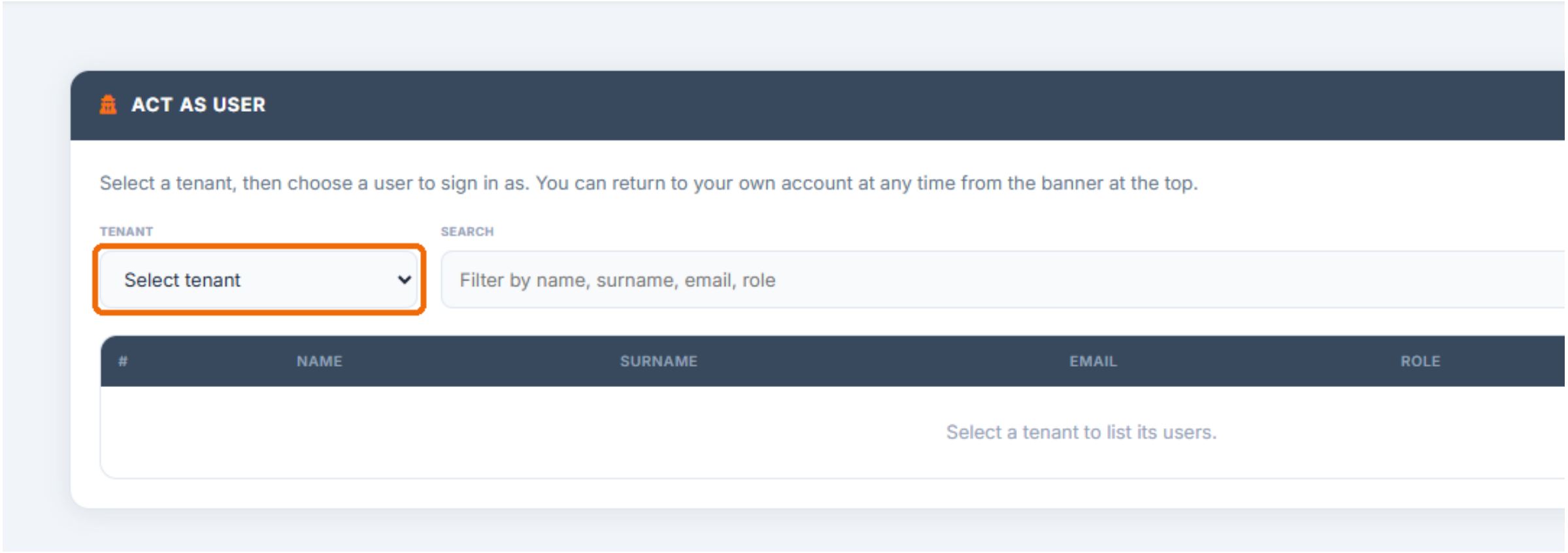
Open Act As User



Open Tenant Admin > Act As User in the side menu. Acting as a user means temporarily signing in as that person, so you see the same menu, pages and data they do. It is the quickest way to help someone who says a page is missing or looks wrong. Names and emails in this lesson are demo placeholders.

Act As User

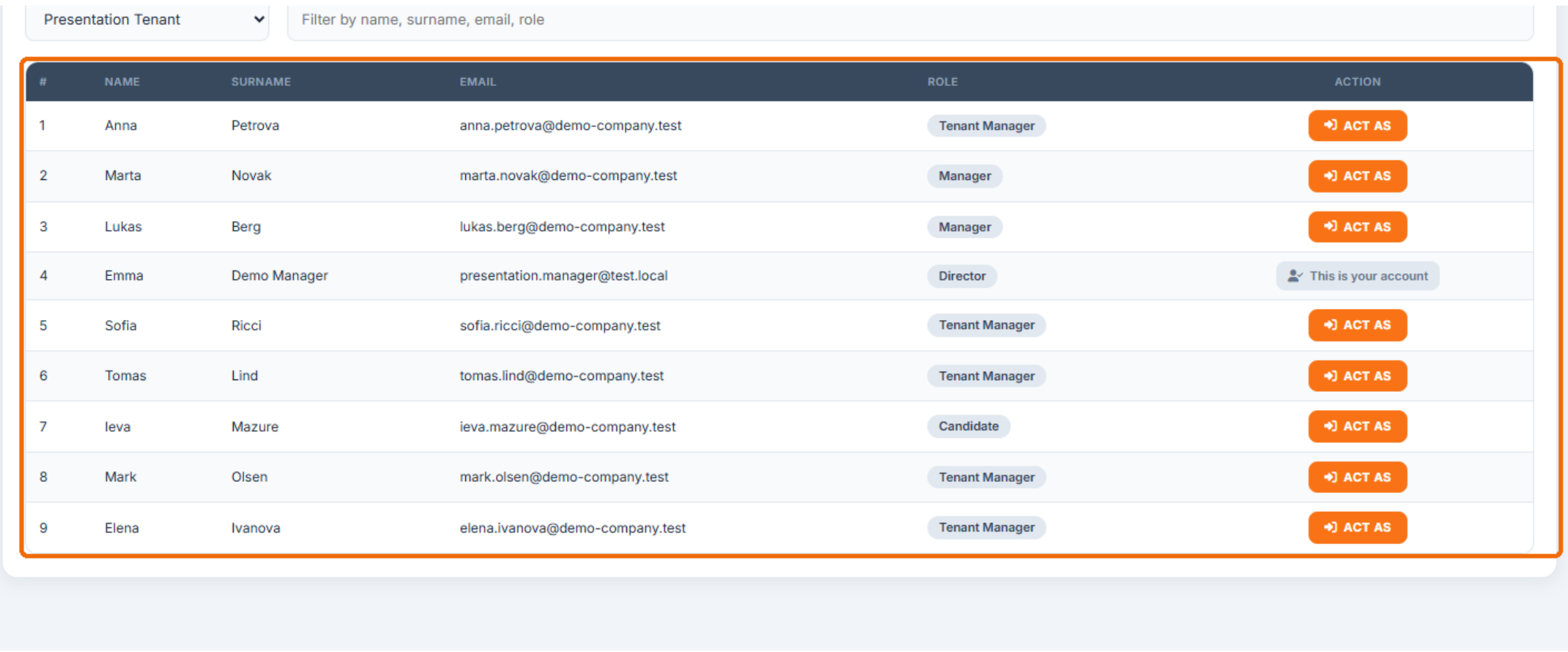
Select the organization



Choose an organization in TENANT. A Tenant Manager only sees the organizations where they hold the Tenant Manager role; the platform administrator sees all of them. Until an organization is selected the table says Select a tenant to list its users.

Act As User

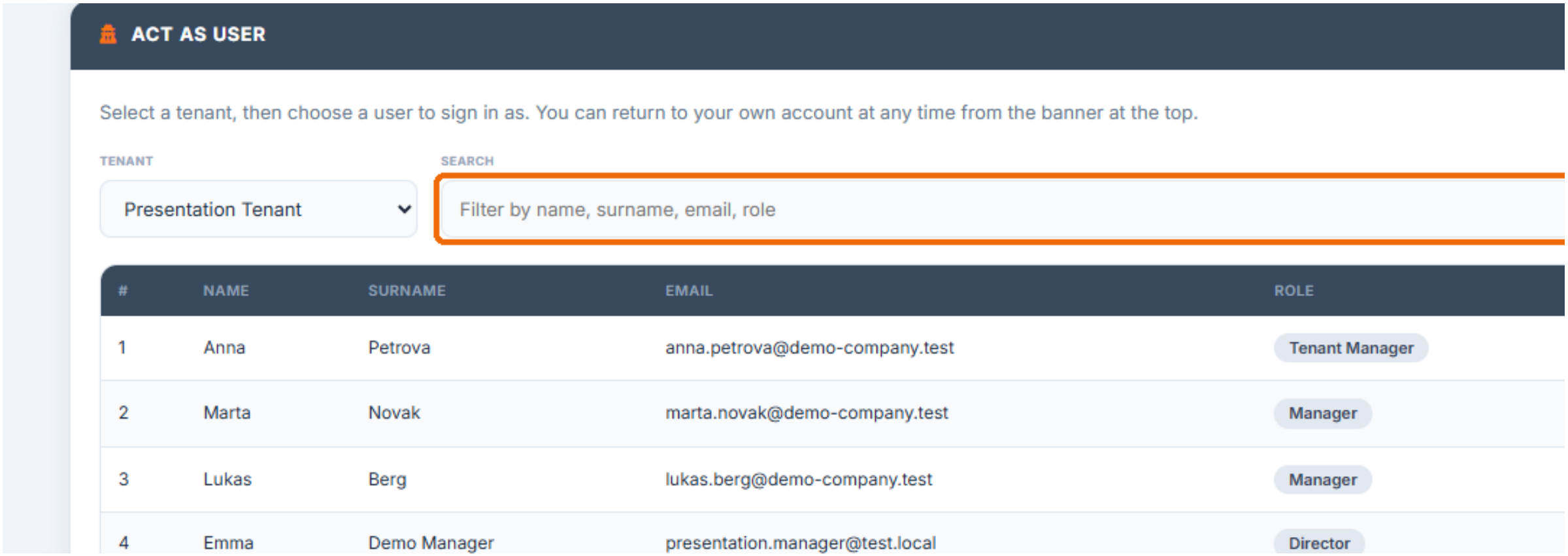
The organization's users



After you select an organization, its users are listed with name, surname, email and role in that organization. Platform administrator accounts are never listed for a Tenant Manager, so they can never act as the administrator.

Act As User

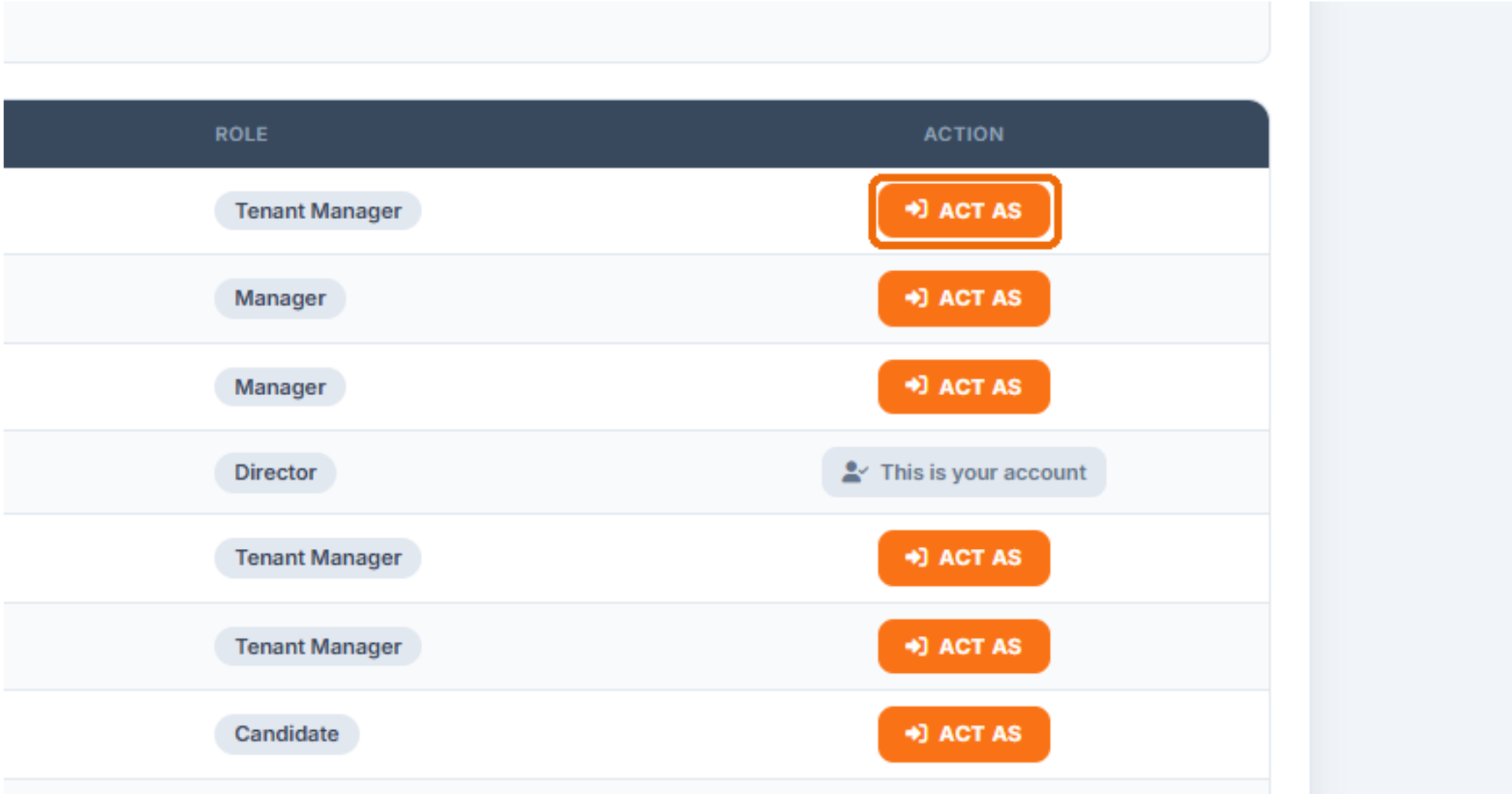
Find a user



Use SEARCH to narrow the list when the organization has many users. You can type part of a name or surname, an email address or a role, for example Candidate.

Act As User

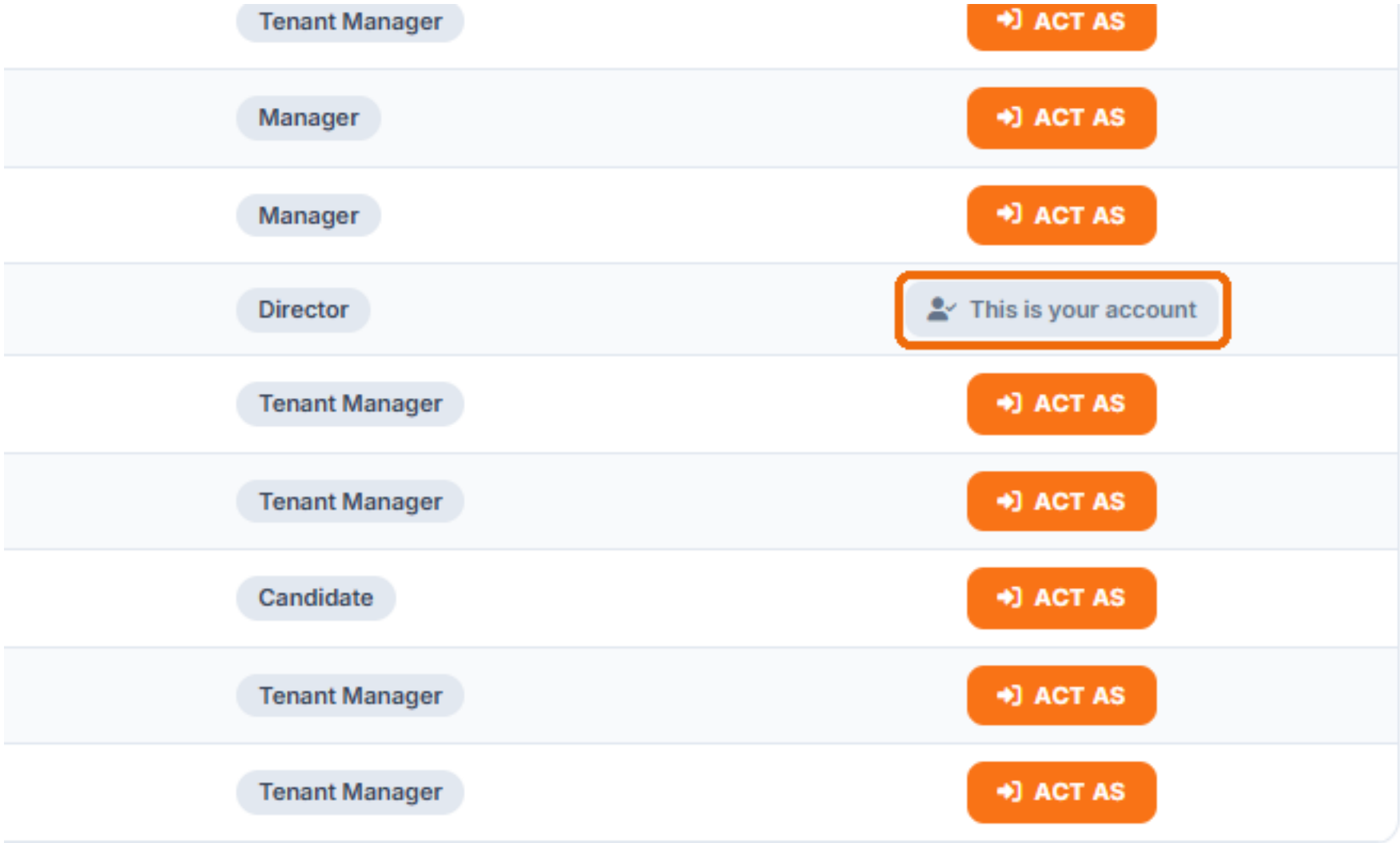
Act as them



Press ACT AS in the person's row. The app asks: Sign in as this user? You will act on their behalf until you return to your account. After you confirm, you are taken to the start page that person normally sees. Remember that everything you save while acting is saved as that person.

Act As User

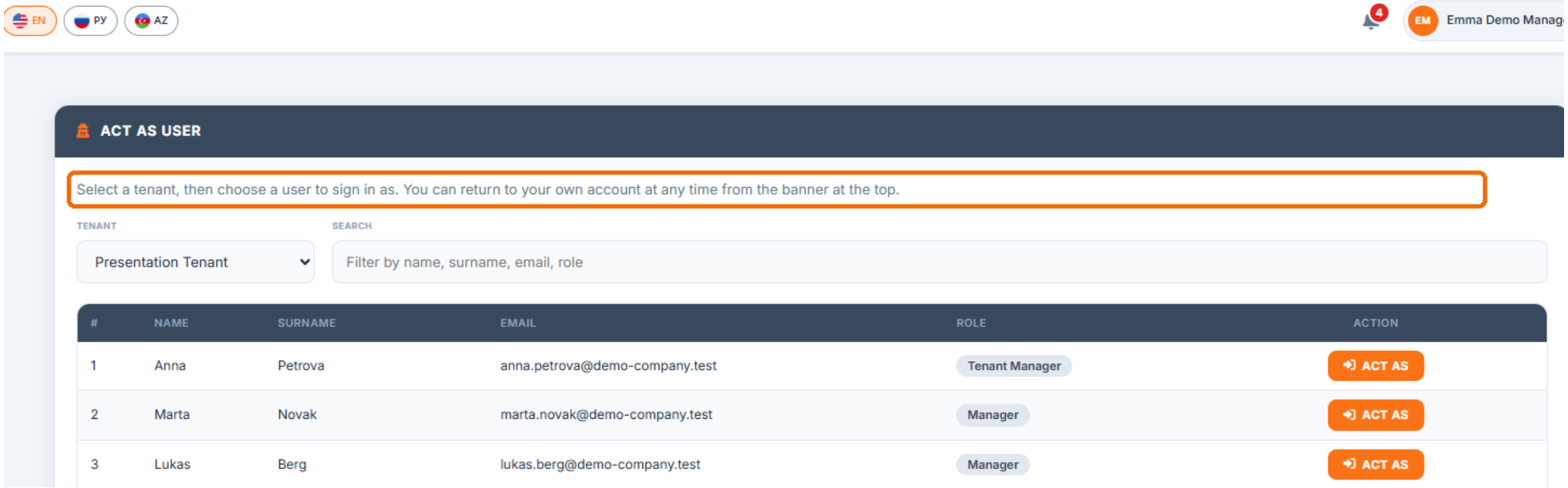
Your own account



You cannot act as yourself, so your own row shows This is your account instead of the ACT AS button. You also cannot start acting as someone else while you are already acting as another user; return to your own account first.

Act As User

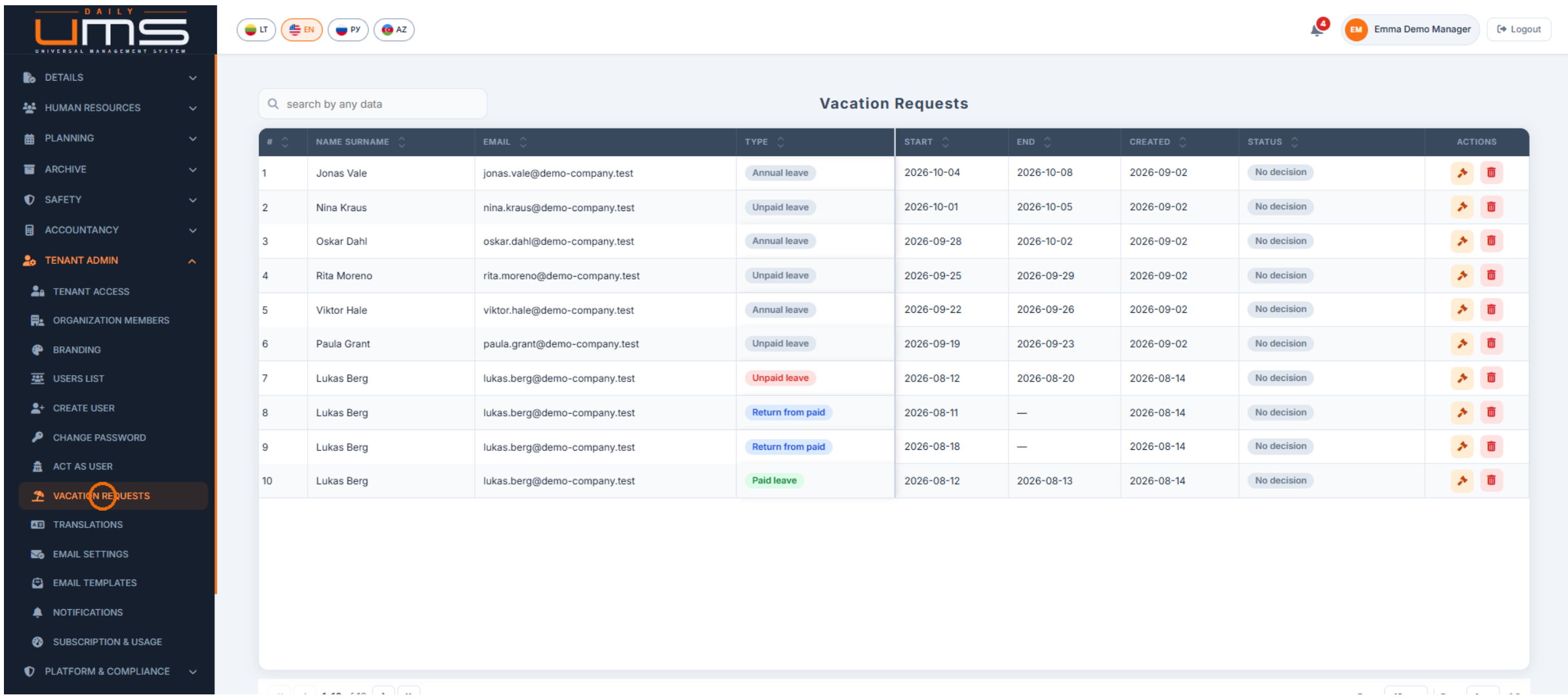
Return to your account



While you are acting as another user, a banner at the top of every page shows whose account you are using and has a button to return to your own account; the line under ACT AS USER reminds you of this. Starting and stopping acting as a user are recorded in the compliance audit log together with your own name, so support sessions stay traceable.

Vacation Requests

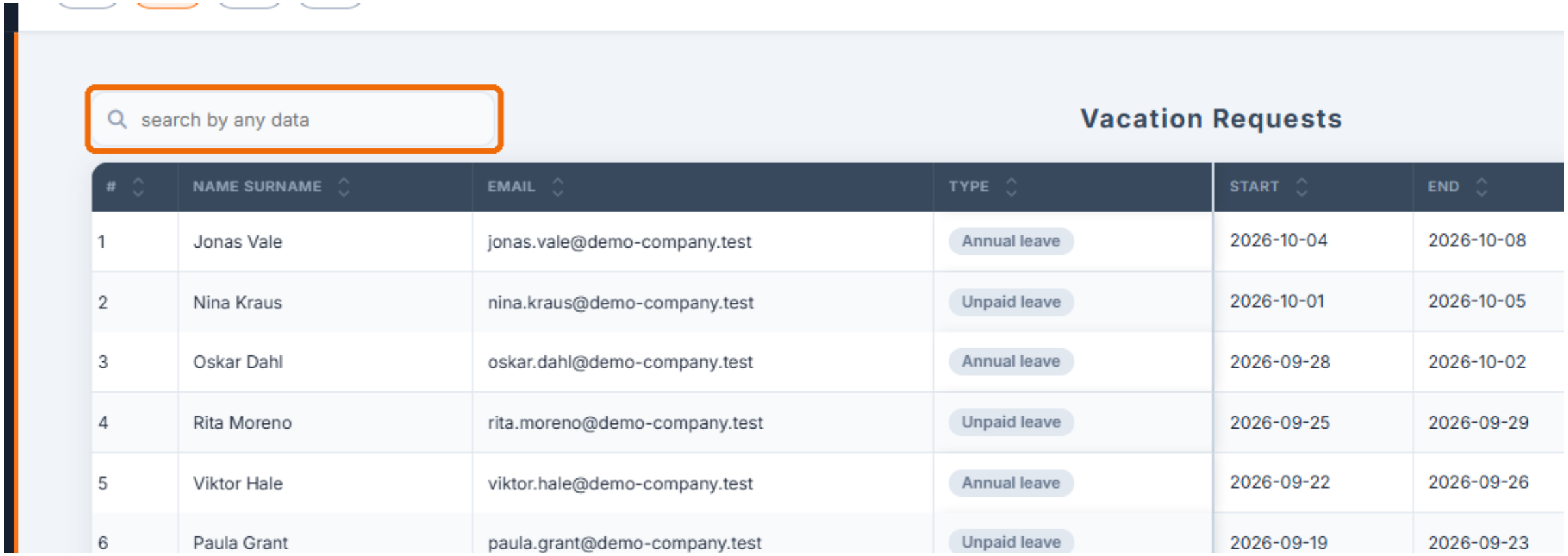
Open Vacation Requests



Open Tenant Admin > Vacation Requests in the side menu. Employees send these requests from their own Vacations page; each request arrives here for a decision. Requests that are still waiting for a decision are always listed first. Names and emails in this lesson are demo placeholders.

Vacation Requests

Search requests



Type in search by any data to find requests by person, email, type of leave or date. Click a column header with arrows to sort, for example by START to see the next absences first. Rows and Page at the bottom control paging.

Vacation Requests

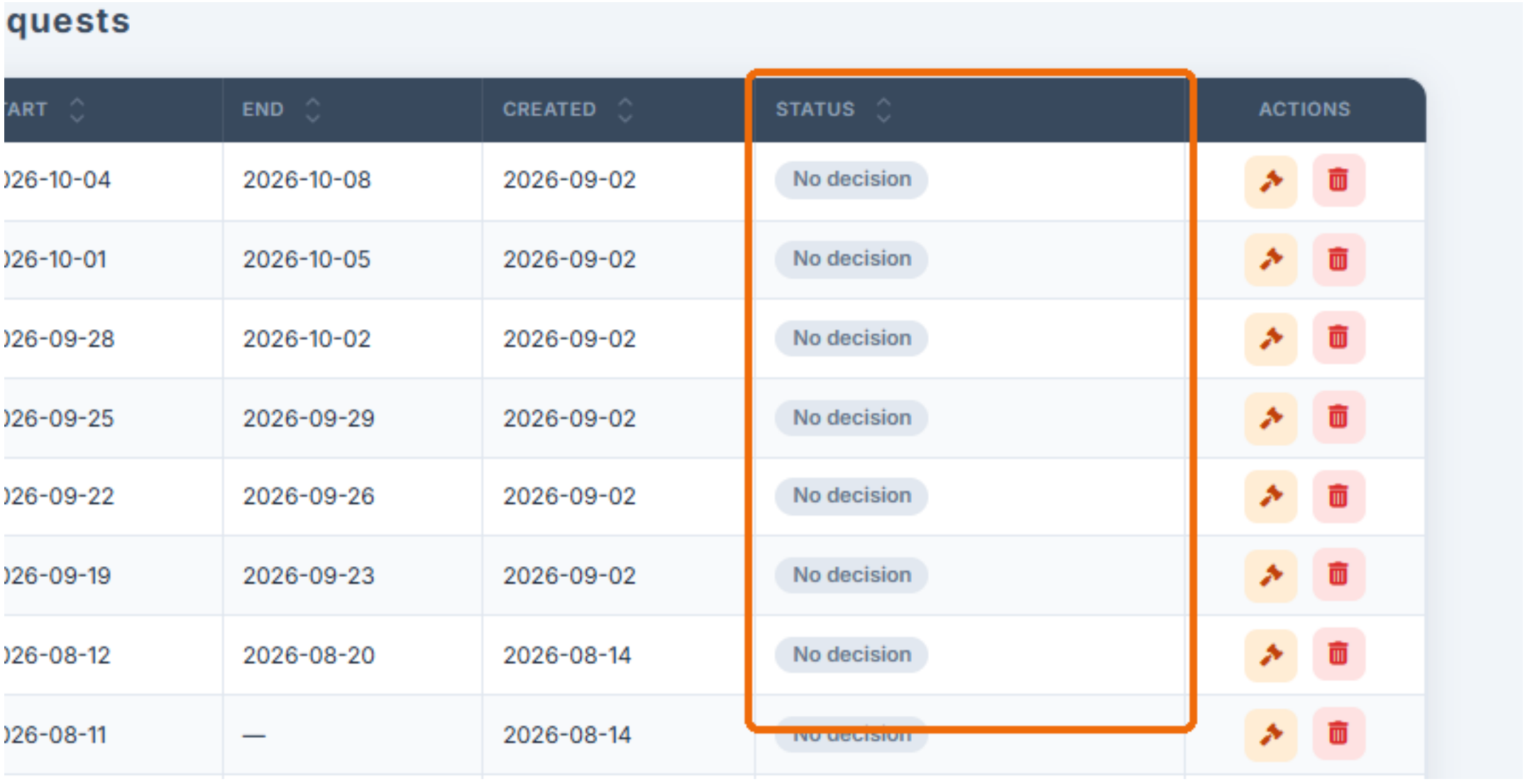
Type and period



TYPE shows what is requested, for example Annual leave, Unpaid leave, Paid leave or Return from paid (an early return to work). START and END give the period; a return request has only a start date. CREATED is the day the employee sent the request.

Vacation Requests

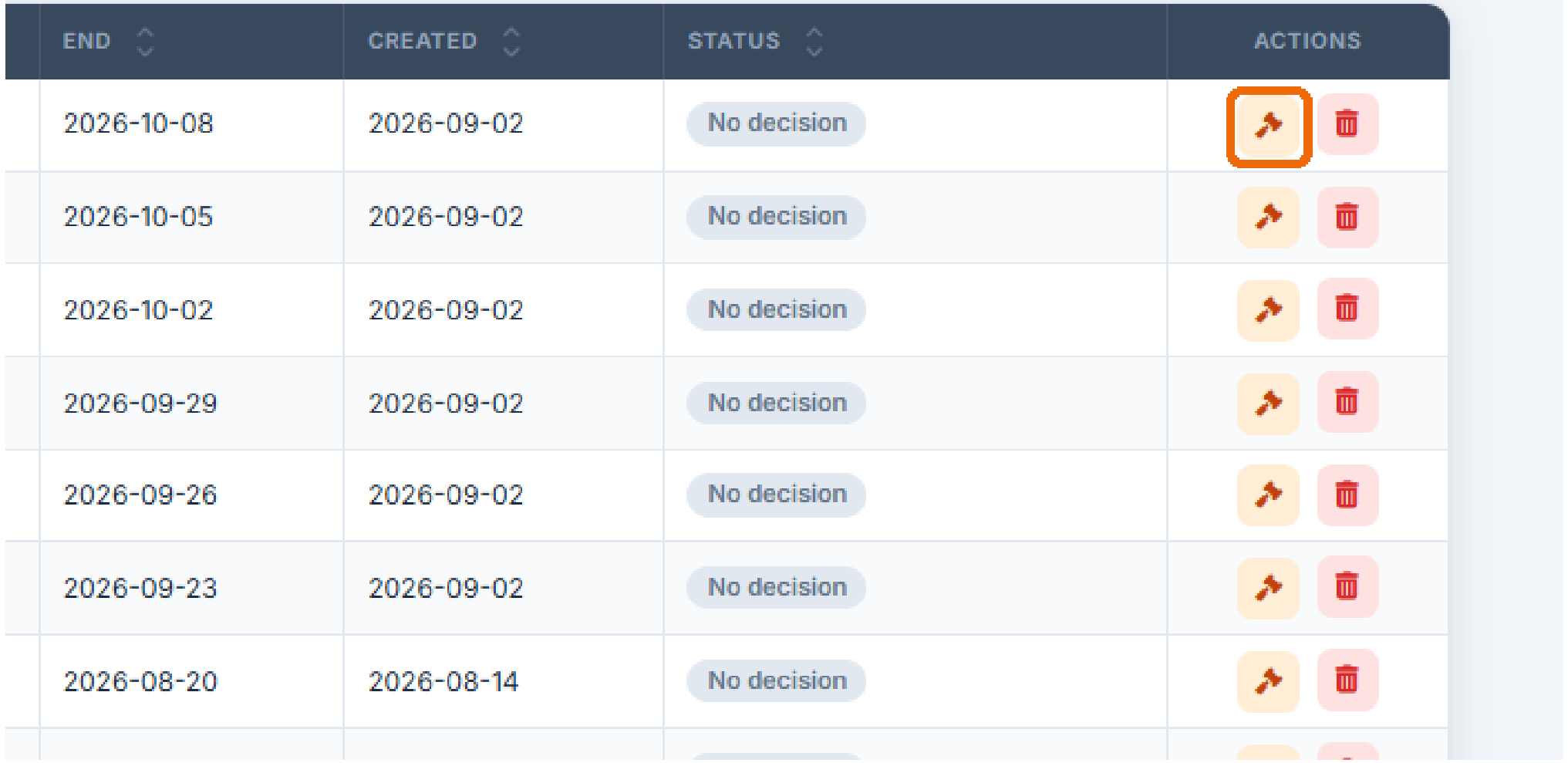
Status



STATUS tells you where each request stands: No decision while it waits for an approver, then Confirmed or Denied once someone has decided. In the demo all requests on the first page are still waiting.

Vacation Requests

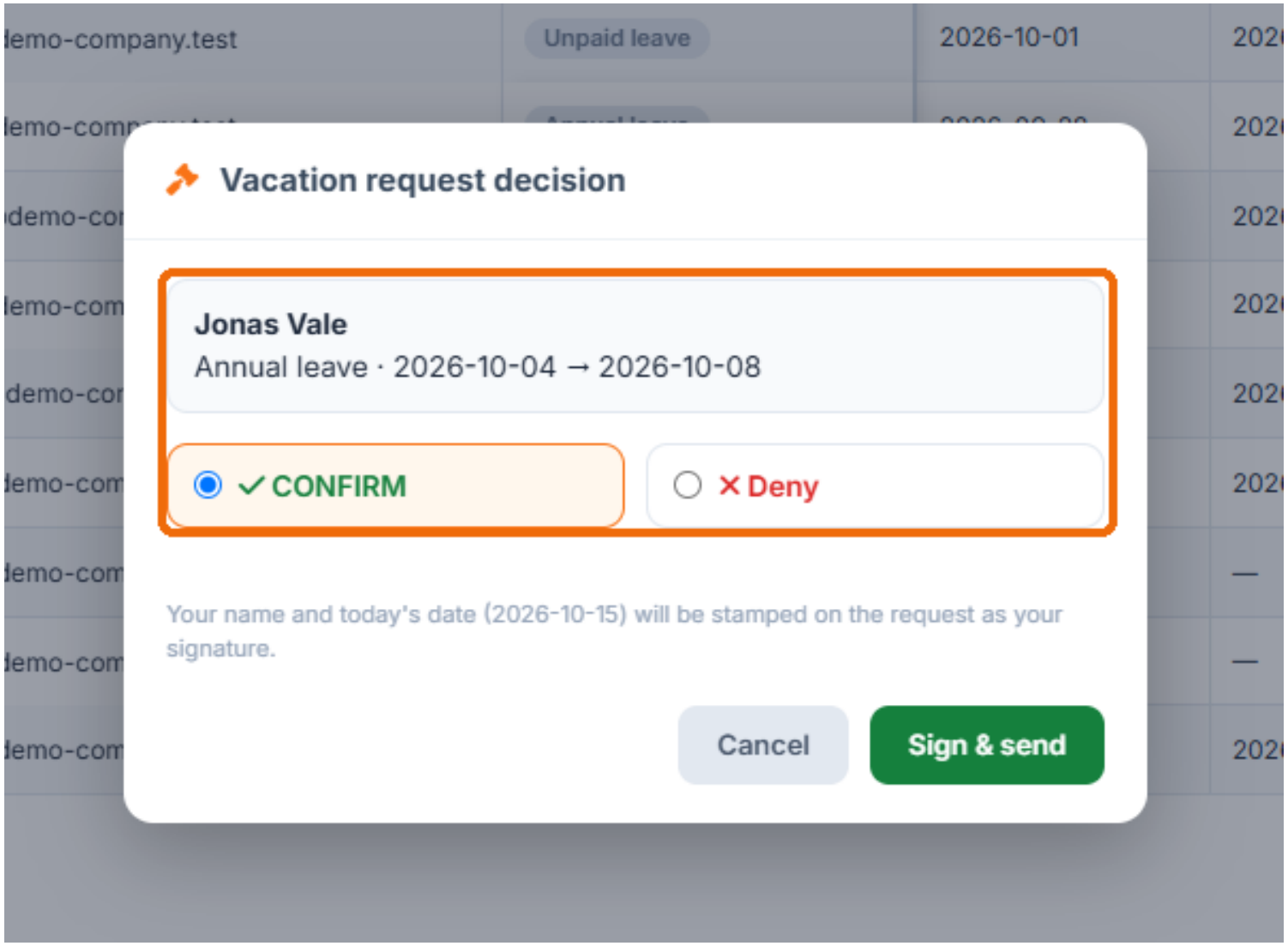
Decide on a request



Press the orange gavel button in the ACTIONS column to decide. It is shown only while the request is undecided, and only to a Director, Tenant Manager or the platform administrator. After a decision the button disappears and file buttons appear instead.

Vacation Requests

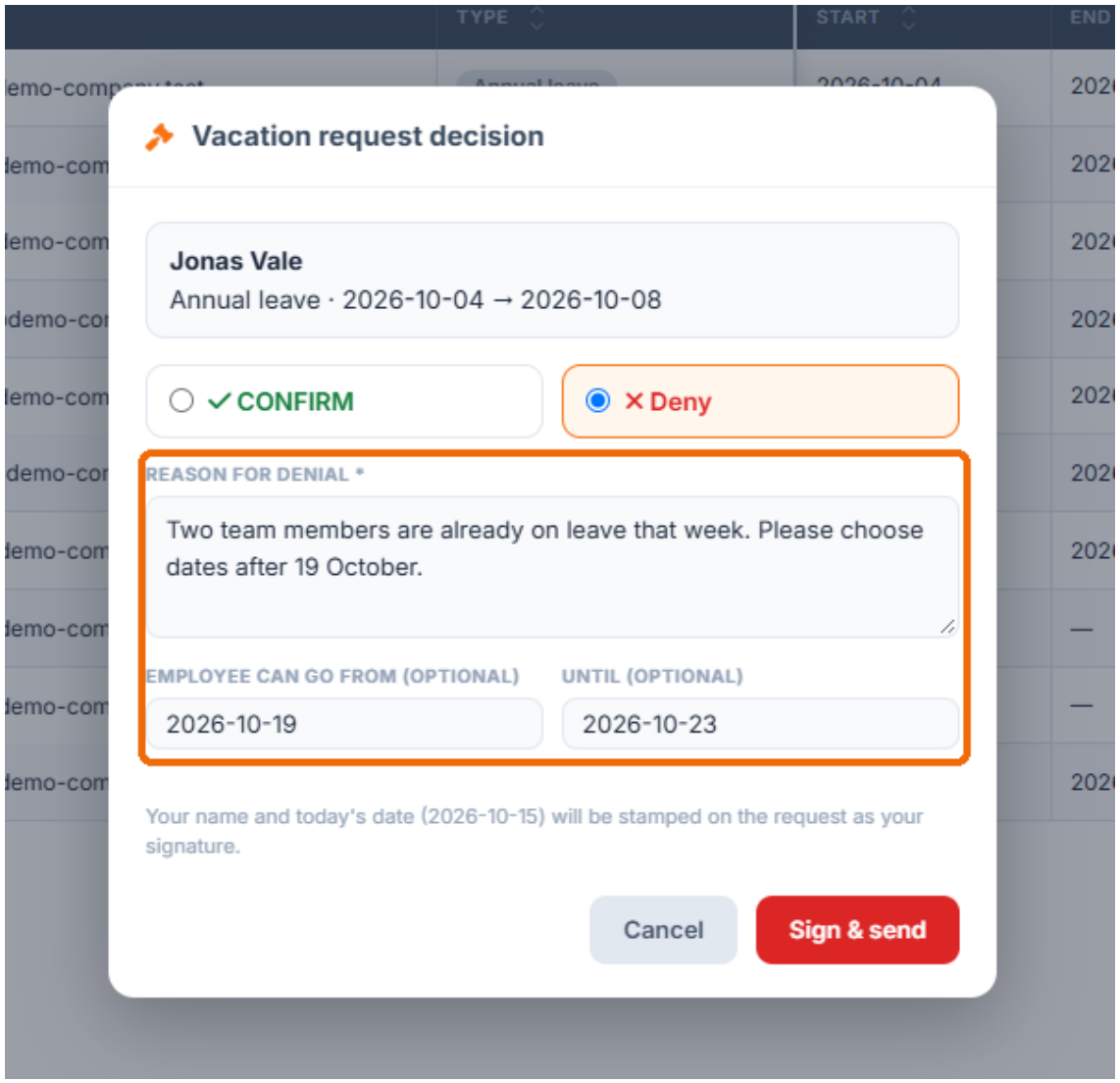
Confirm



The Vacation request decision window repeats who asked for what (name, type of leave and period). CONFIRM is selected by default. The note below explains that your name and today's date will be stamped on the request as your signature.

Vacation Requests

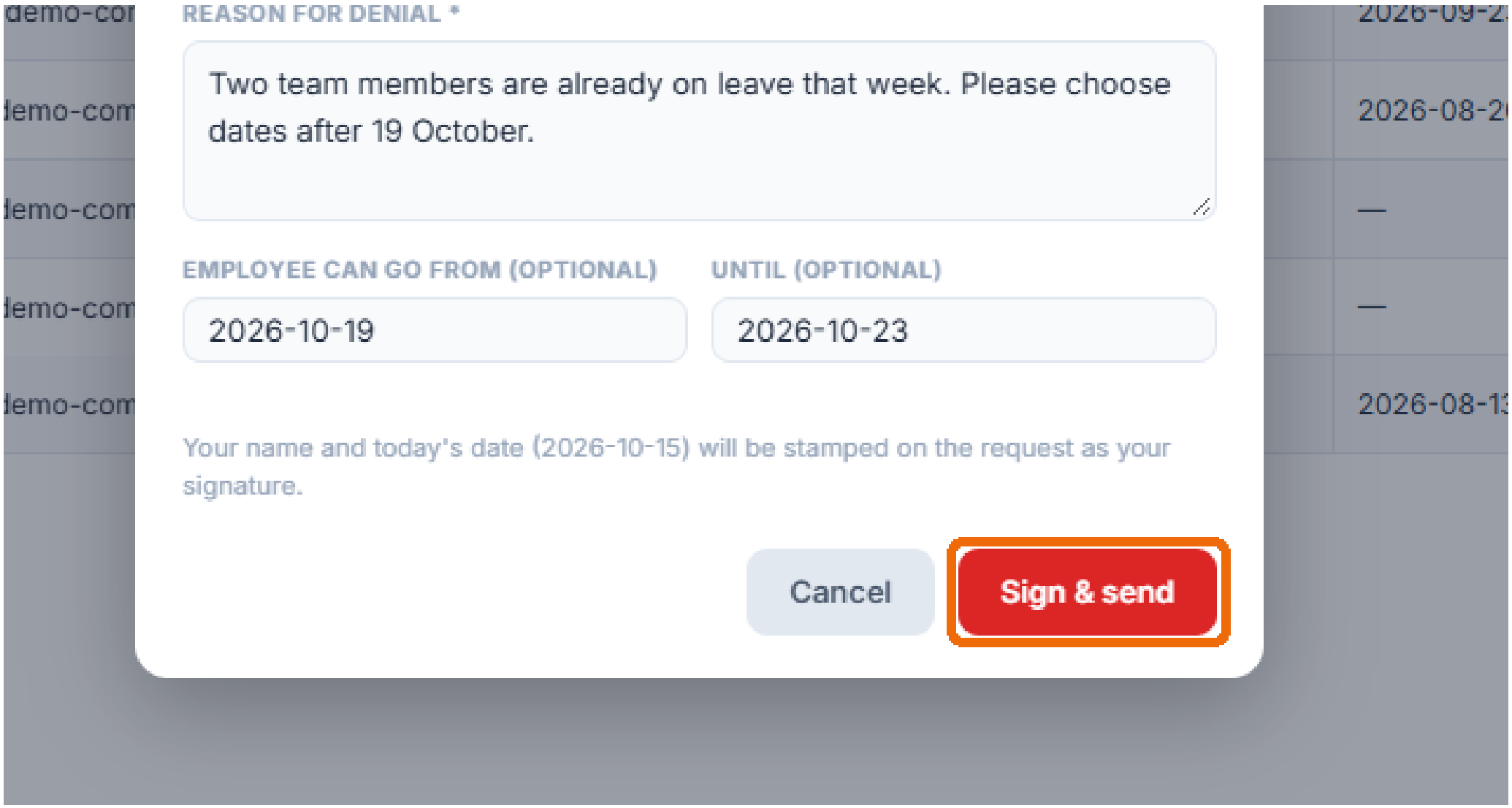
Deny with a reason



To refuse, choose Deny. Reason for denial is required and is sent to the employee, so explain it clearly. Optionally fill Employee can go from and Until to propose another period, for example the week after. Nothing is saved until you press Sign & send.

Vacation Requests

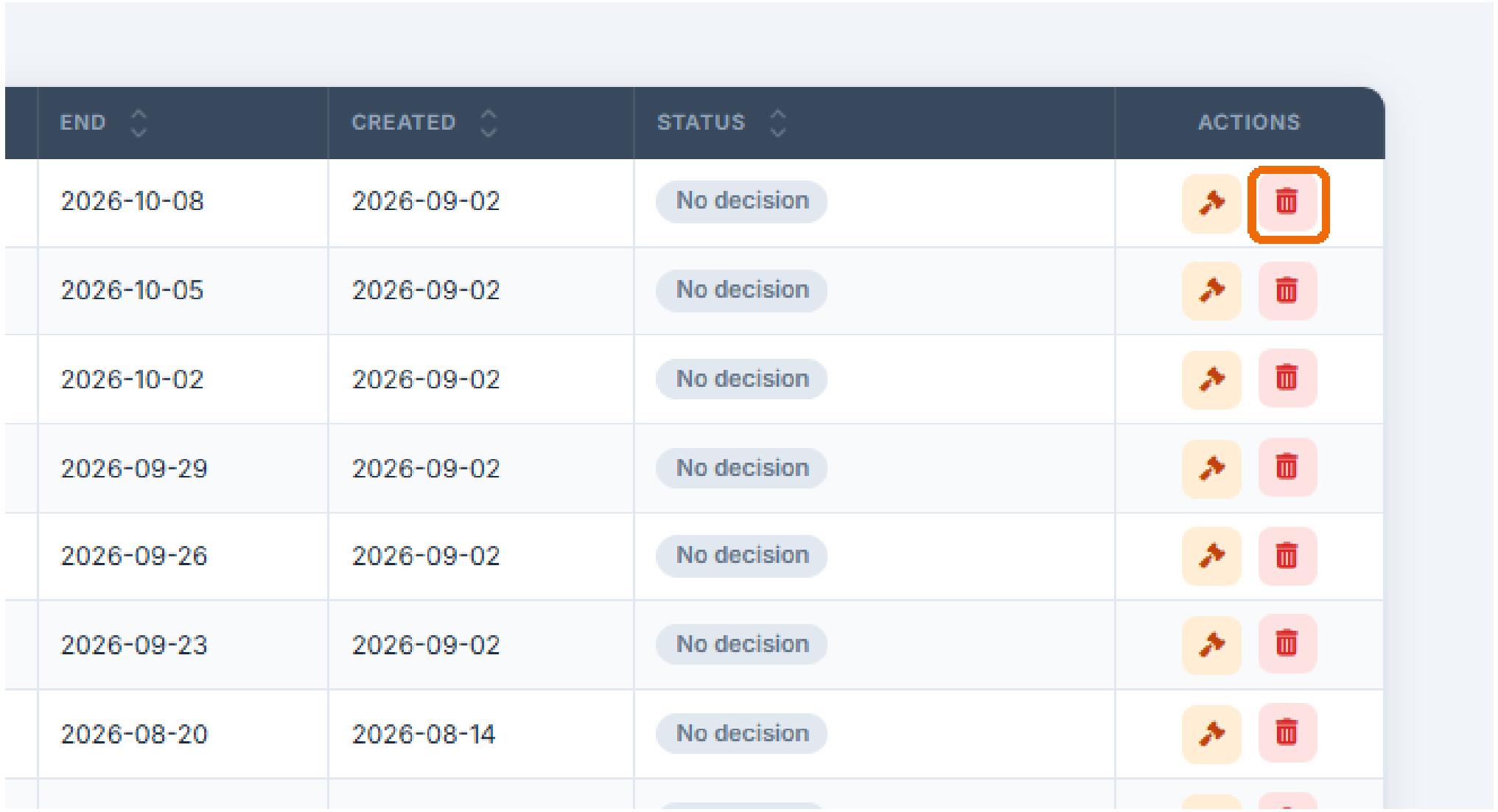
Sign & send



Press Sign & send to record the decision. Your name and the date are stamped and signed on the request PDF, the status changes to Confirmed or Denied, and the employee and the approvers receive an email. Cancel closes the window without any change.

Vacation Requests

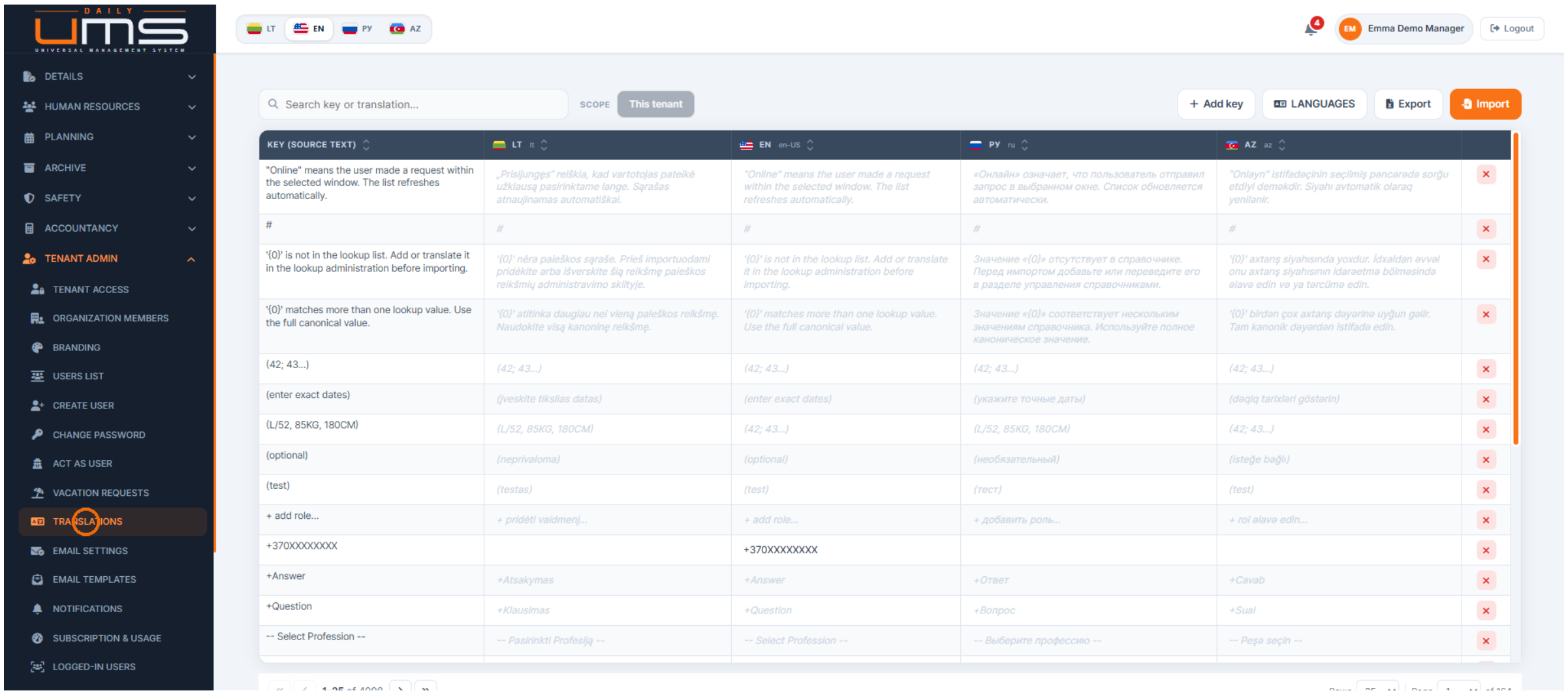
Files and delete



When files exist, the ACTIONS column also shows a PDF button for the request the employee signed and a signed-file button for the confirmed or denied request. The red bin permanently deletes a request after a confirmation; use it only for duplicates or mistakes, because the decision history is lost.

Translations

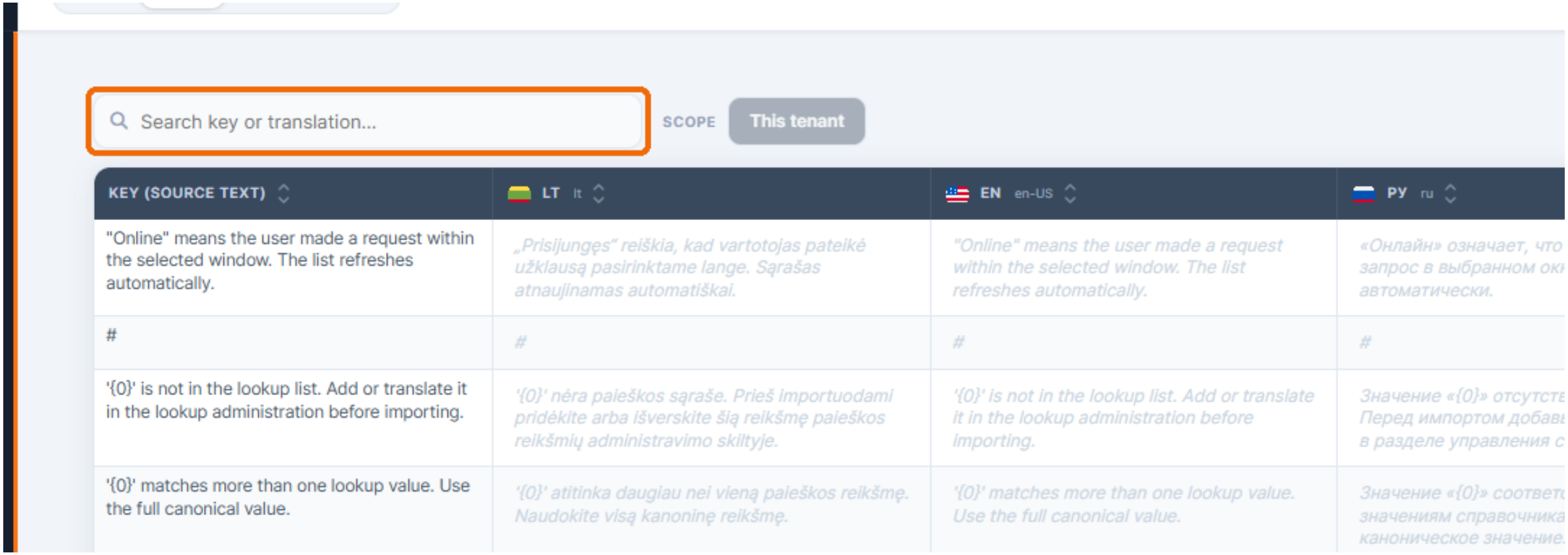
Open Translations



Open Tenant Admin > Translations in the side menu. Every button, title, message and tour text of the app is listed here, including profession and country names. Each row is one phrase and each column one language, so you can adjust the wording your people see without any programming.

Translations

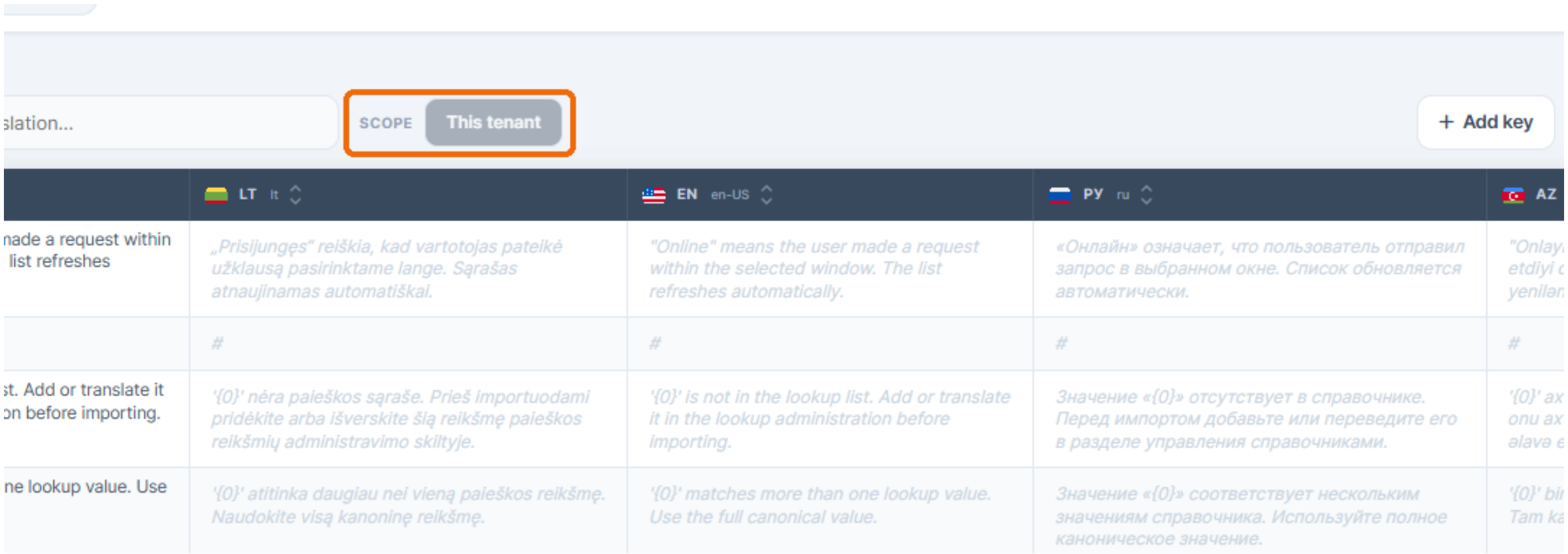
Find a phrase



Type part of the text in Search key or translation. The search looks in the key (the original English text) and in every translation, so you can search in Lithuanian or Russian too. There are several thousand phrases, so searching is much faster than paging.

Translations

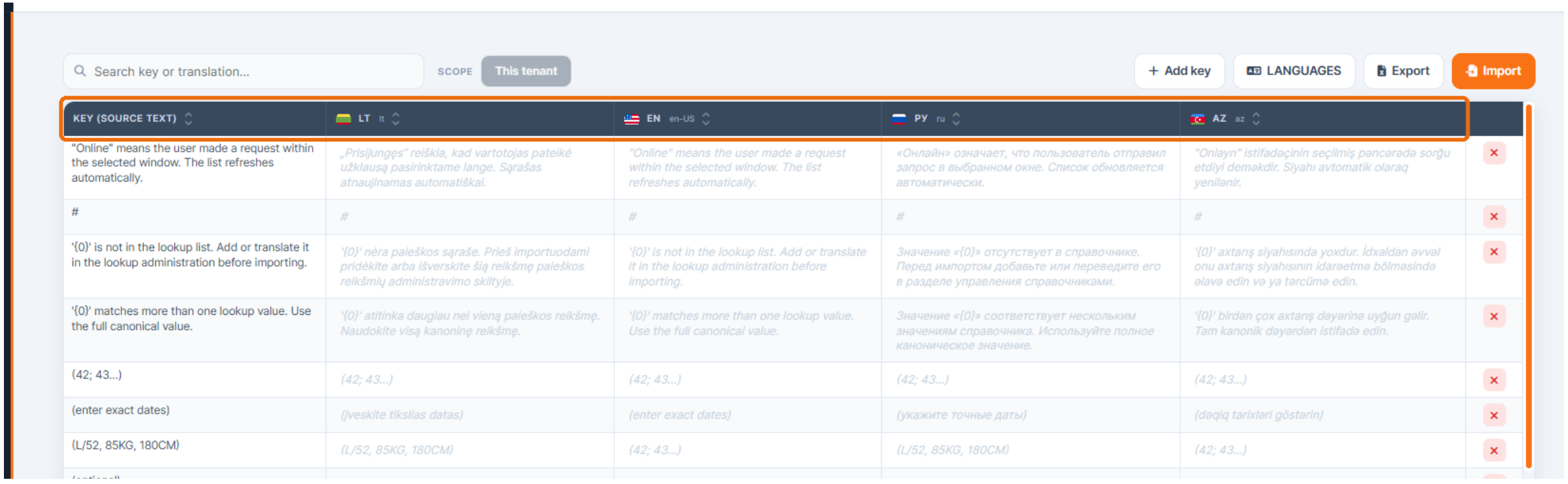
Scope: this organization



SCOPE shows This tenant: every change you make here is saved as your organization's own version of the text. Other organizations keep the shared (global) wording, which only the platform administrator can change.

Translations

One column per language



KEY (SOURCE TEXT) is the original English text the app uses to find a phrase; it cannot be edited here. Each further column is one active language with its flag and culture code, for example LT lt, EN en-US, RU ru and AZ az.

Translations

Grey text is the shared wording



A cell with grey italic text has no wording of its own for your organization, so the shared translation (shown in grey) is used. Click the cell and type your text. Press Enter or click elsewhere to save; Shift+Enter adds a new line. The change appears across the app straight away.

Translations

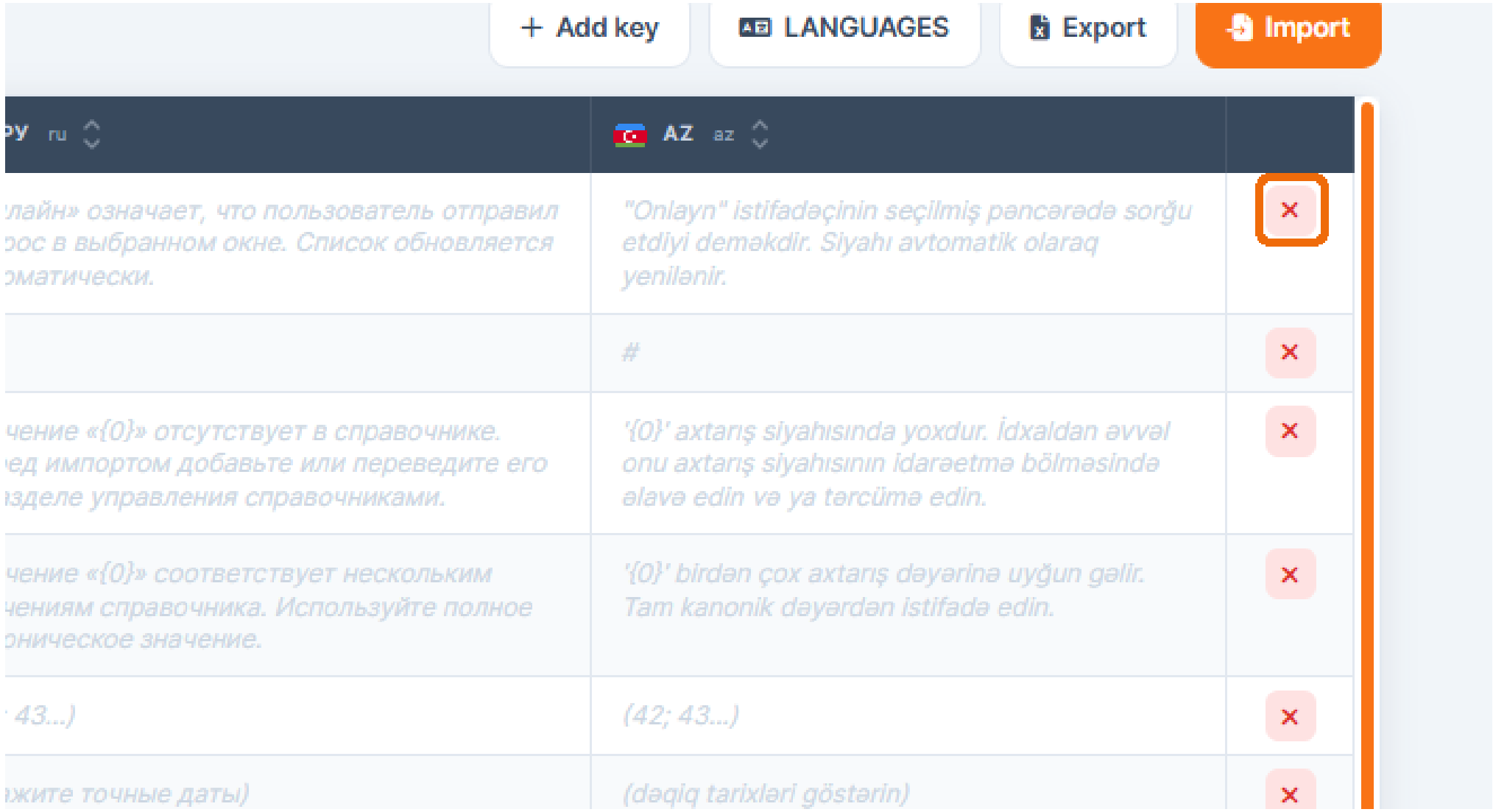
Your own wording

(neprivaloma)	(optional)	(необязательный)	(isteğe bağlı)
(testas)	(test)	(тест)	(test)
+ pridėti vaidmenį...	+ add role...	+ добавить роль...	+ rol əlavə edin...
	+370XXXXXXXX		
+Atsakymas	+Answer	+Ответ	+Cavab
+Klausimas	+Question	+Вопрос	+Sual
-- Pasirinkti Profesiją --	-- Select Profession --	-- Выберите профессию --	-- Peşə seçin --

Text in dark, normal letters is your organization's own wording, like the EN value of +370XXXXXXXX in the demo. Empty a cell to go back to the shared wording for that language.

Translations

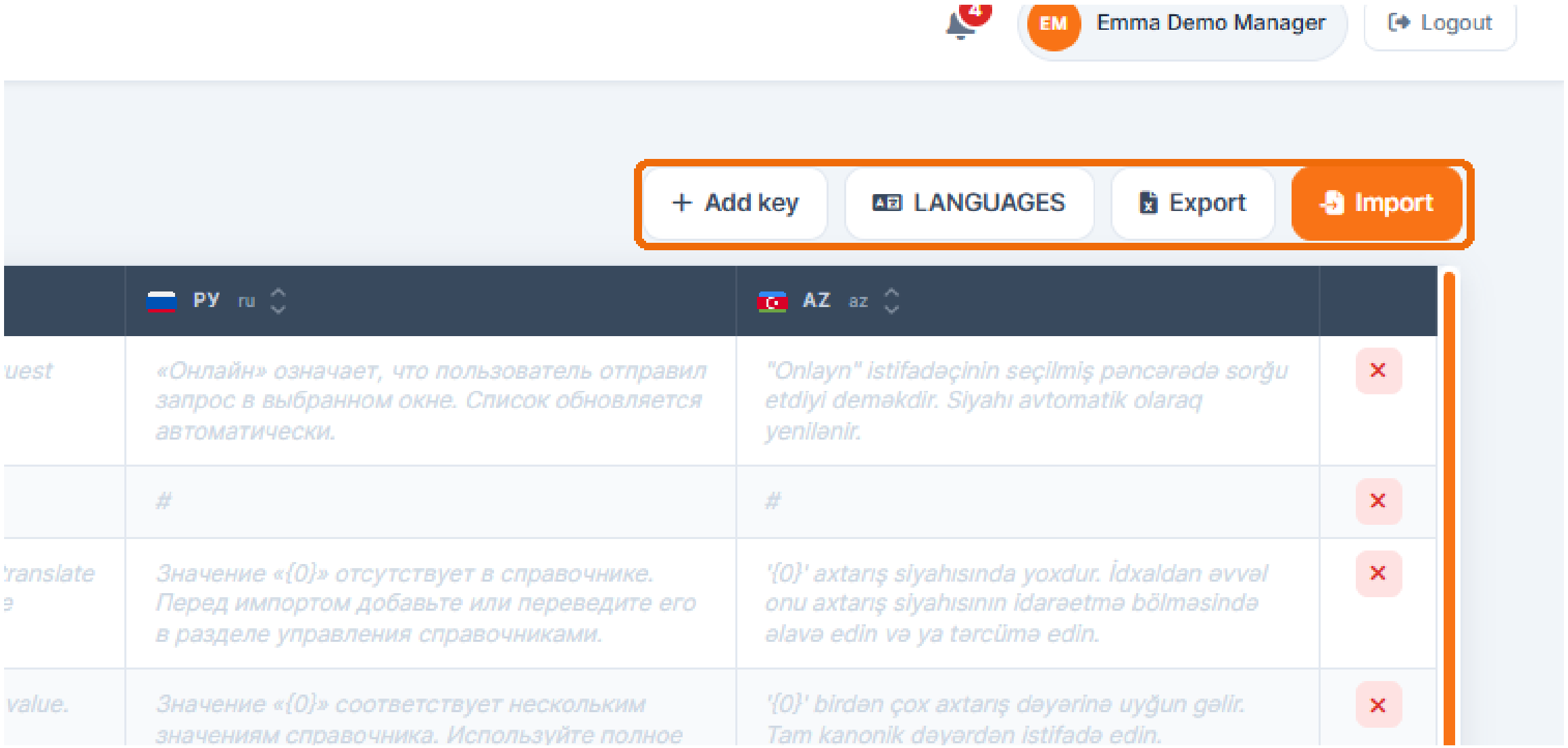
Remove your changes



The red x at the end of a row deletes your organization's own wording for that phrase in all languages, after asking Delete this key override for this tenant? The shared wording is used again. Shared phrases themselves are never deleted from here.

Translations

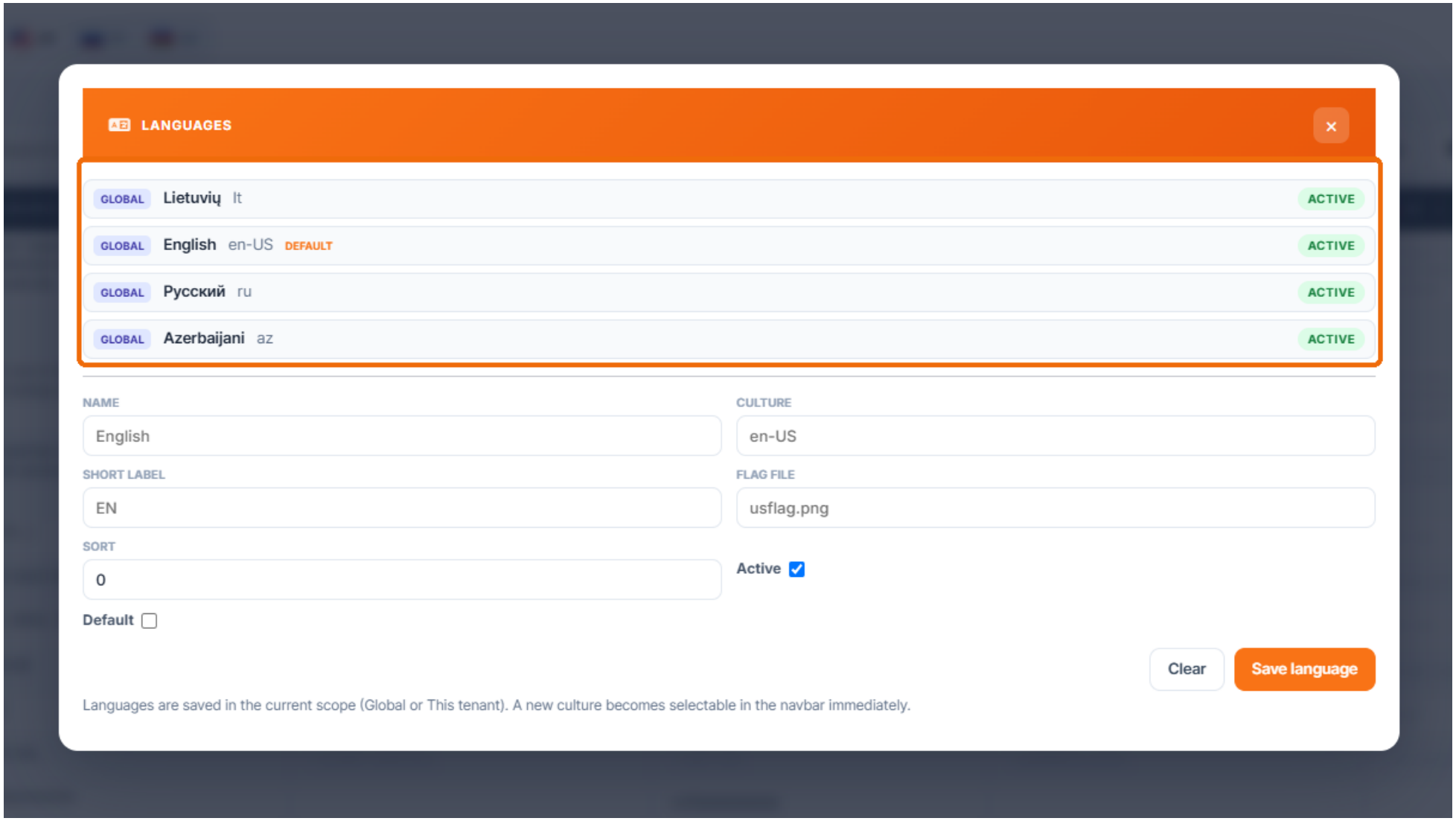
Add key, Export, Import



Add key creates a new phrase for your organization when you need one. Export downloads all translations as one Excel file: the first column is the key (do not change it), then one column per language. Import uploads an edited file, which is the fastest way to have a translator check many texts at once.

Translations

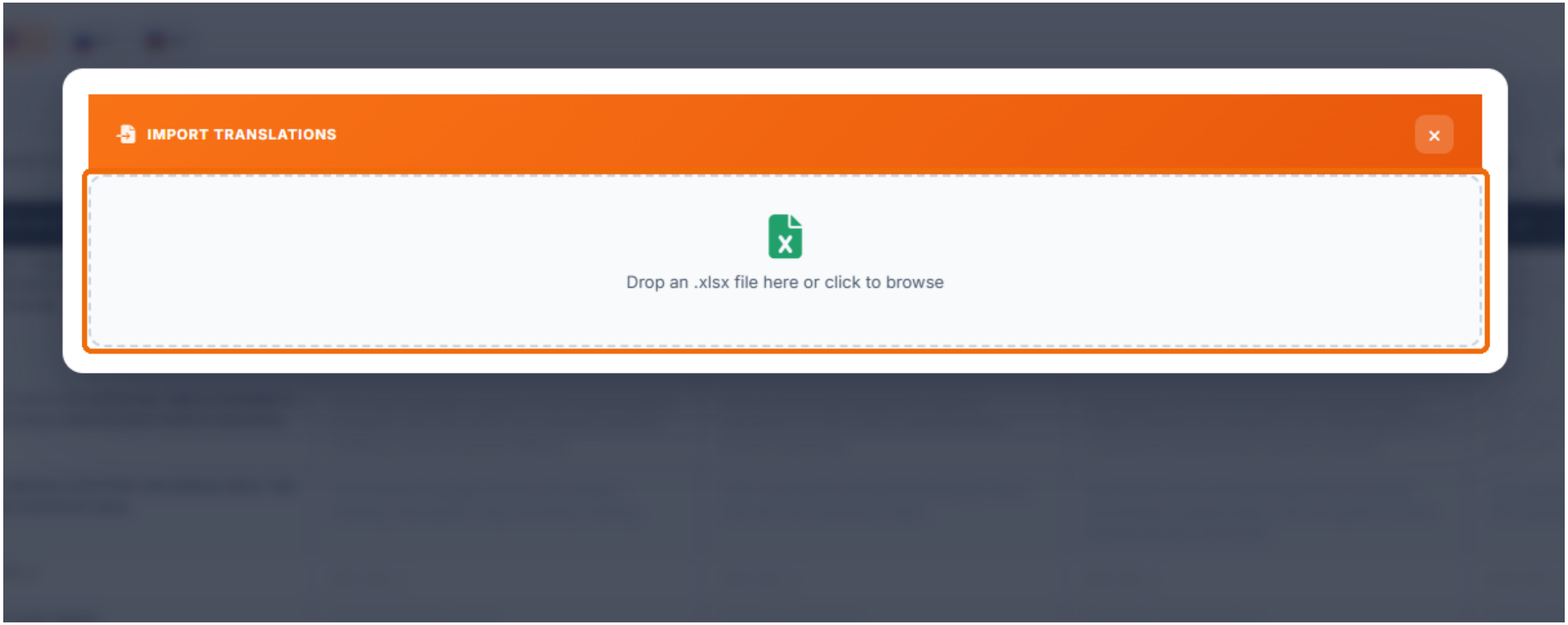
Languages



LANGUAGES opens the list of languages. GLOBAL languages (Lithuanian, English, Russian, Azerbaijani) are shared by all organizations and managed by the platform administrator, so here they are read-only and only show whether they are active. To add a language only for your organization, fill Name, Culture (for example de-DE), Short label, Flag file and Sort, tick Active and press Save language. It immediately gets its own column and appears in the language buttons at the top.

Translations

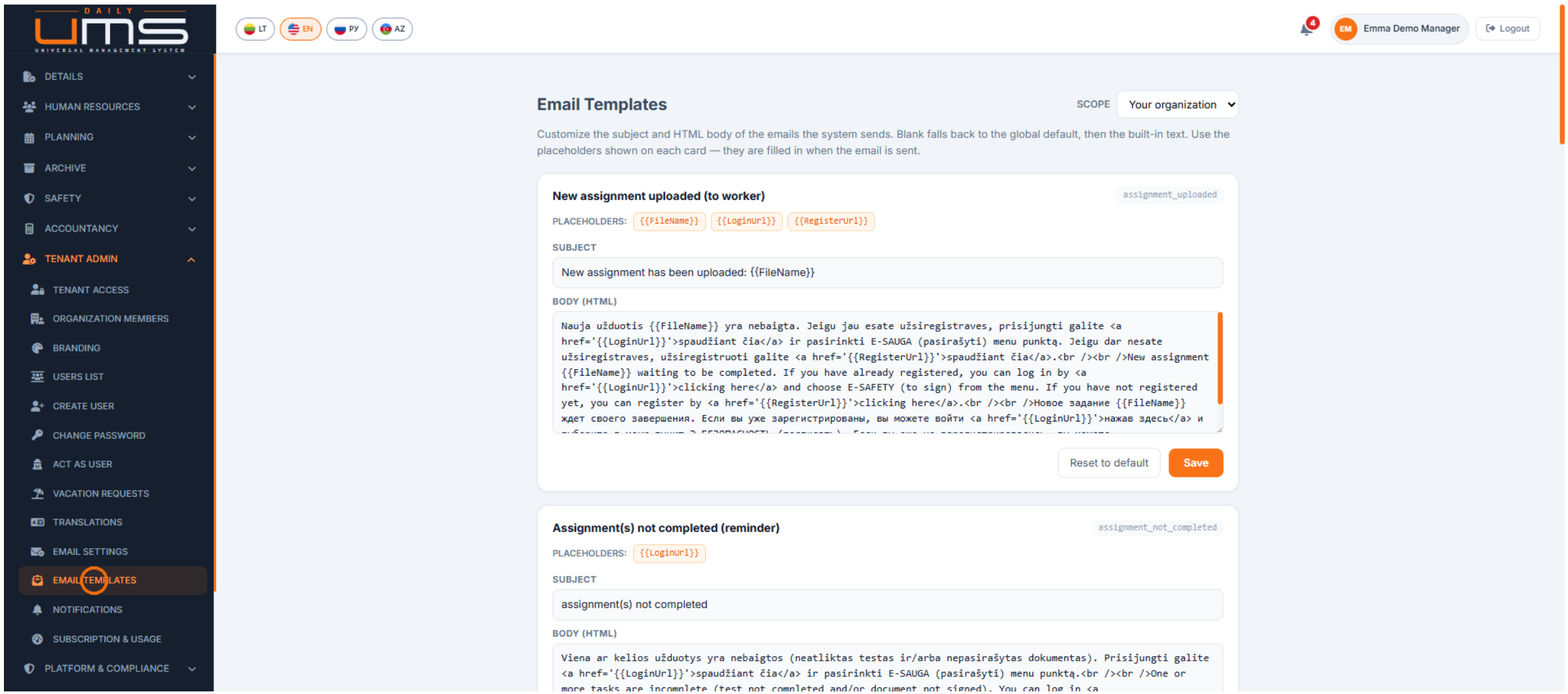
Import from Excel



Import opens IMPORT TRANSLATIONS. Drop an .xlsx file on the dashed area or click to browse. Next you choose which column is the key and which column is which language, see a preview and decide whether existing translations may be overwritten. The rows are then applied with a progress bar.

Email Templates

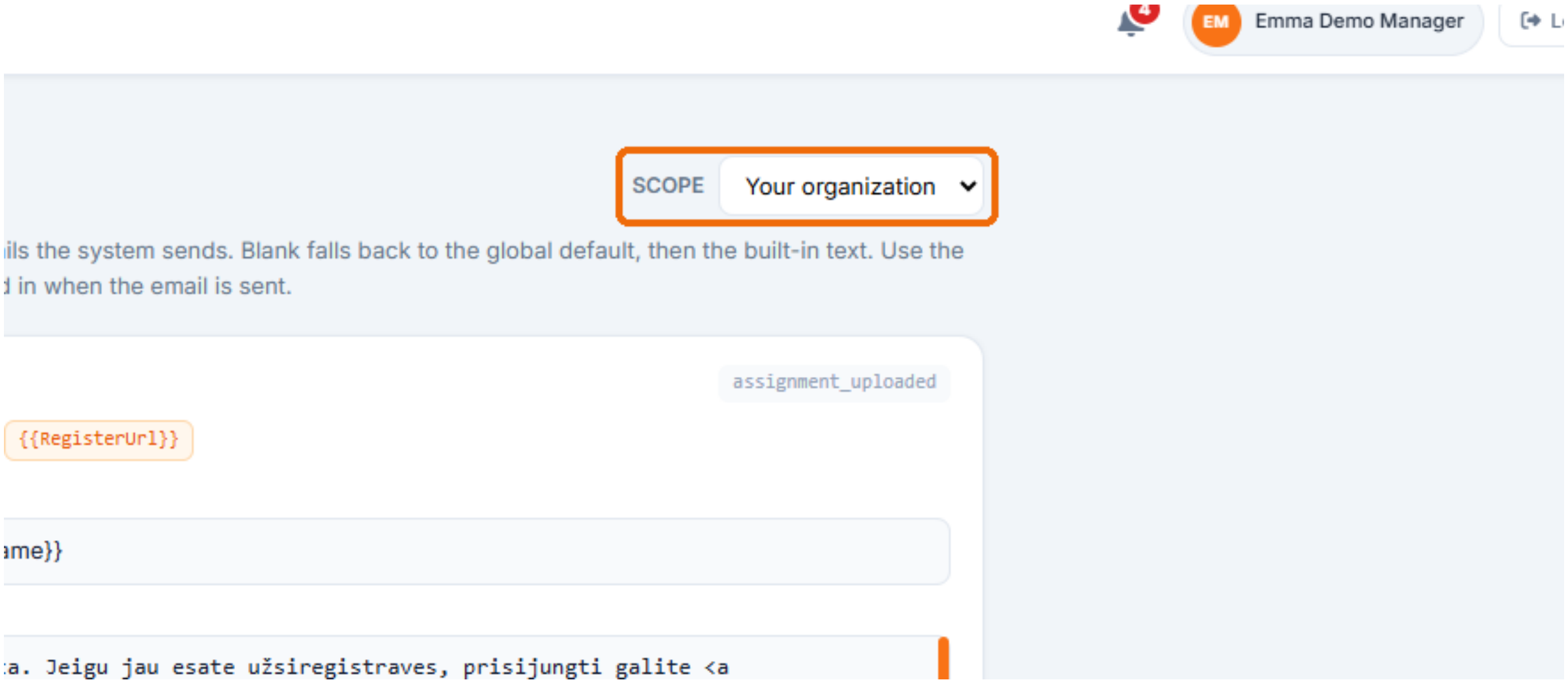
Open Email Templates



Open Tenant Admin > Email Templates in the side menu. The app sends emails automatically, for example when a login is created, a password is reset, a document is waiting to be signed or a vacation request arrives. Here you can change what those emails say.

Email Templates

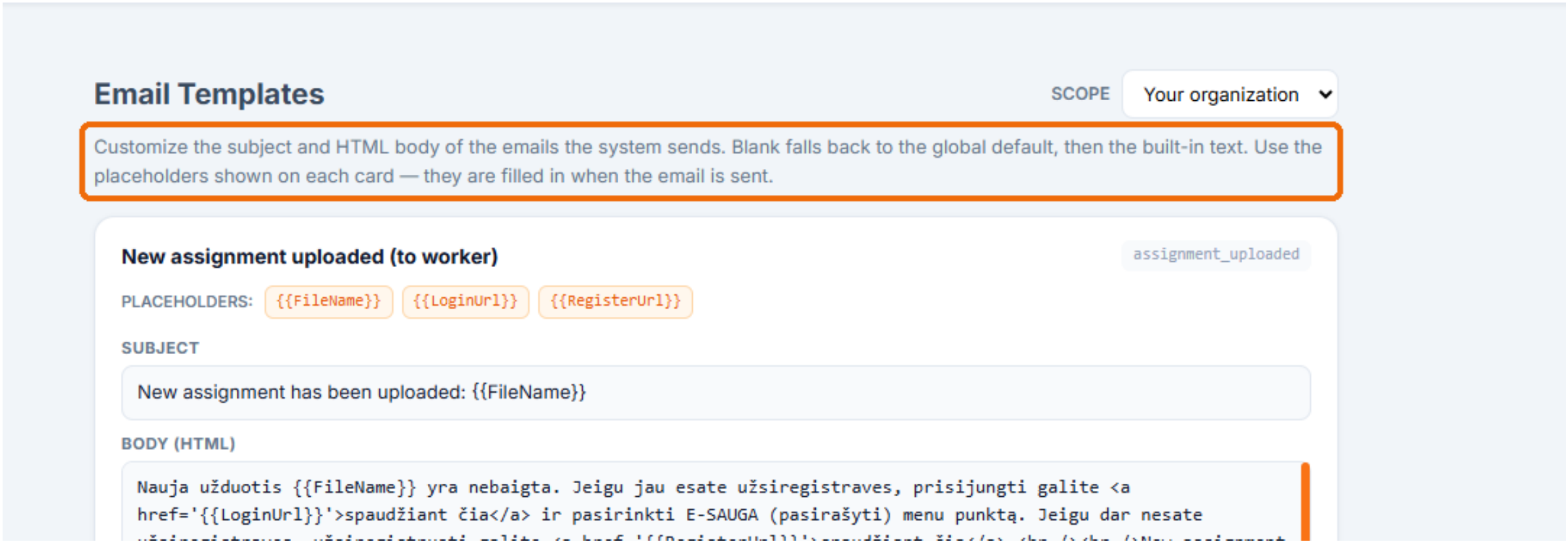
Scope



SCOPE shows Your organization. A template you save here is used only for emails sent to people of your organization. The shared templates for all organizations are managed by the platform administrator.

Email Templates

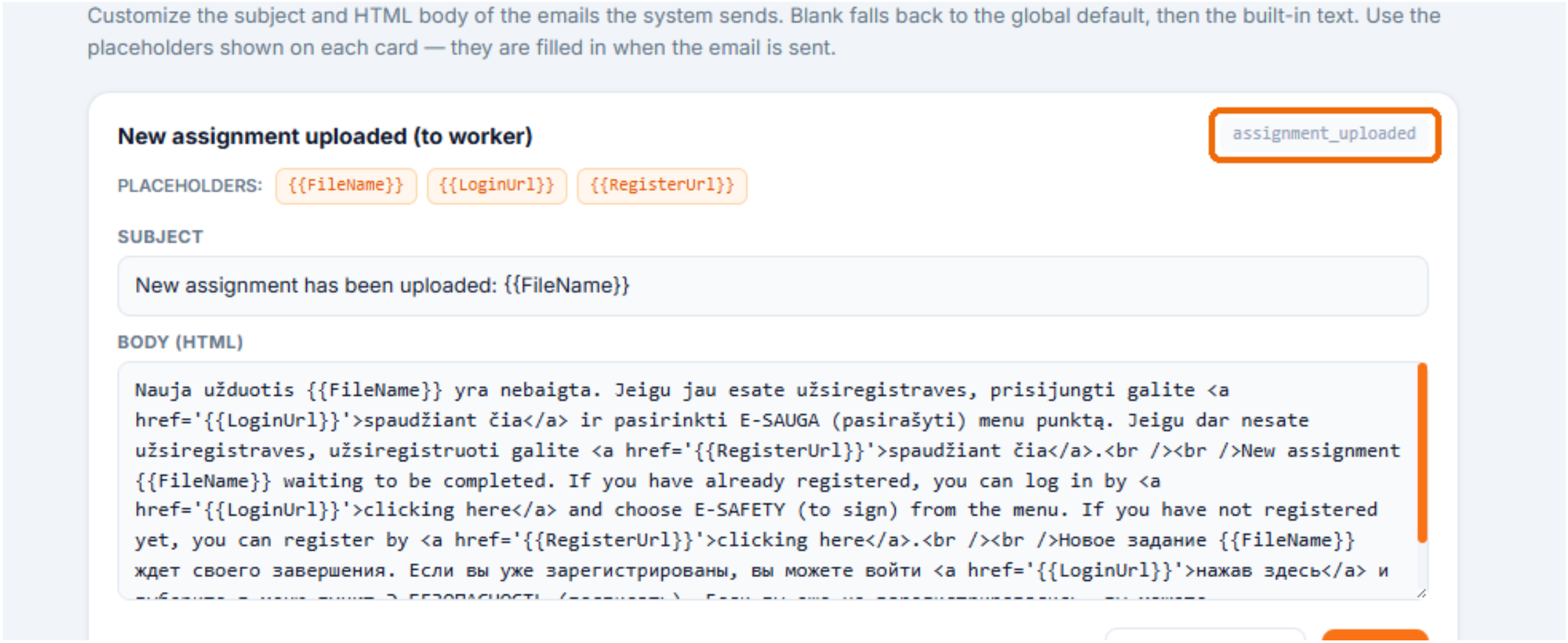
How the text is chosen



As the note under the title says, the app first uses your organization's template. If a field is blank it falls back to the shared default, and if that is blank too, to the text built into the app. So you only need to fill the templates you actually want to change.

Email Templates

One card per email



Every card is one email, for example New assignment uploaded (to worker), Assignment(s) not completed (reminder), Account created, Organization access granted, Password changed, Verification code, the vacation request emails and the MIGRIS update. The grey code in the corner (assignment_uploaded) identifies the template.

Email Templates

Placeholders

Customize the subject and HTML body of the emails the system sends. Blank falls back to the global default, then the built-in text. Use the placeholders shown on each card — they are filled in when the email is sent.

New assignment uploaded (to worker) `assignment_uploaded`

PLACEHOLDERS: `{{FileName}}` `{{LoginUrl}}` `{{RegisterUrl}}`

SUBJECT

New assignment has been uploaded: {{FileName}}

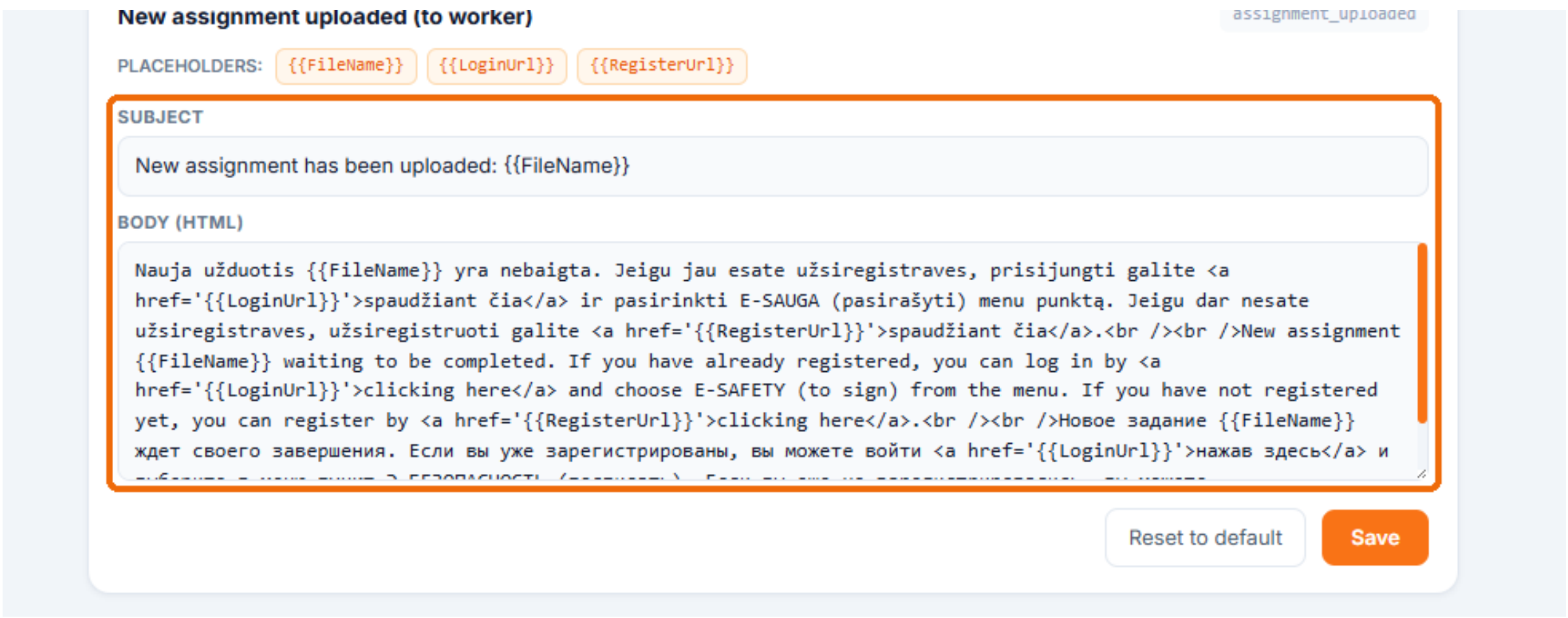
BODY (HTML)

```
Nauja užduotis {{FileName}} yra nebaigta. Jeigu jau esate užsiregistraves, prisijungti galite <a
href='{{LoginUrl}}'>spaudžiant čia</a> ir pasirinkti E-SAUGA (pasirašyti) menu punktą. Jeigu dar nesate
užsiregistraves, užsiregistruoti galite <a href='{{RegisterUrl}}'>spaudžiant čia</a>.<br /><br />New assignment
{{FileName}} waiting to be completed. If you have already registered, you can log in by <a
href='{{LoginUrl}}'>clicking here</a> and choose E-SAFETY (to sign) from the menu. If you have not registered
yet, you can register by <a href='{{RegisterUrl}}'>clicking here</a>.<br /><br />Новое задание {{FileName}}
ждет своего завершения. Если вы уже зарегистрированы, вы можете войти <a href='{{LoginUrl}}'>нажав здесь</a> и
```

PLACEHOLDERS lists the words in double curly brackets that this email understands, for example {{FileName}}, {{LoginUrl}} and {{RegisterUrl}}. Type them exactly as shown, including the brackets; when the email is sent they are replaced with the real file name or link.

Email Templates

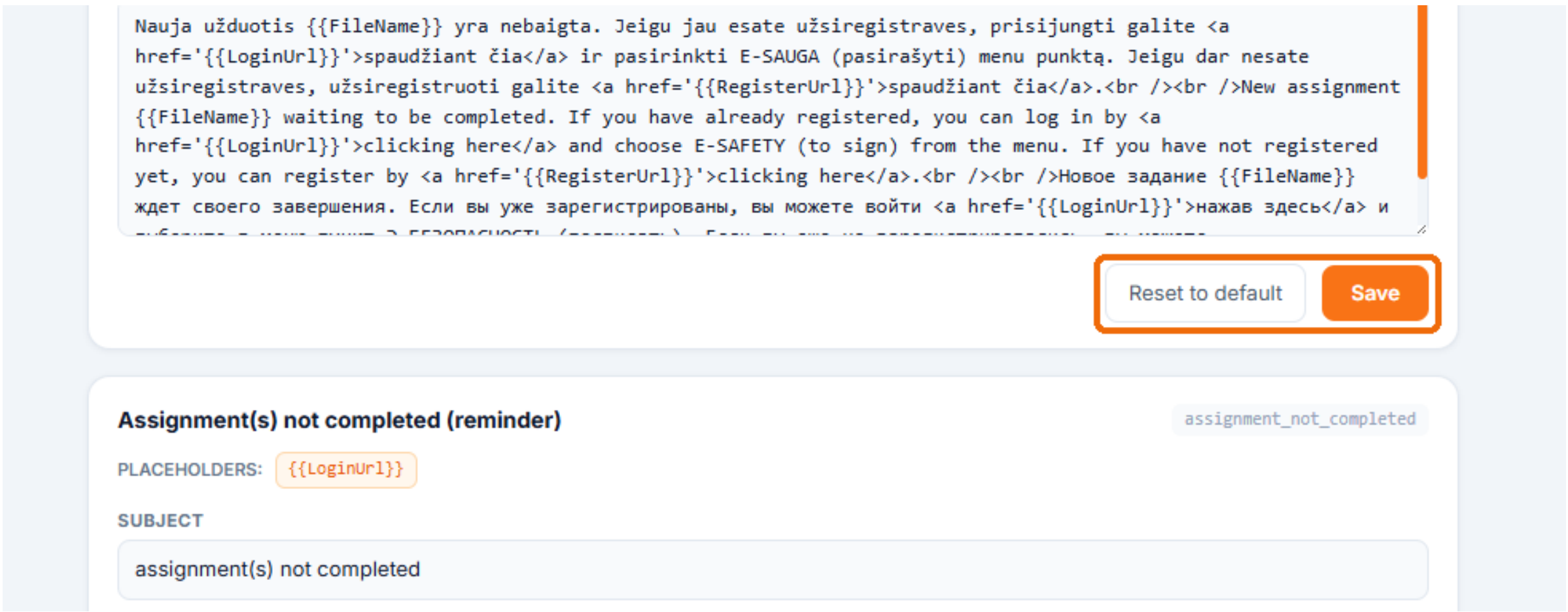
Subject and body



SUBJECT is the email subject line. BODY (HTML) is the message itself; you can use simple HTML such as <br /> for a new line and ... for a link. The demo templates contain Lithuanian, English and Russian in one message, so every reader finds their language.

Email Templates

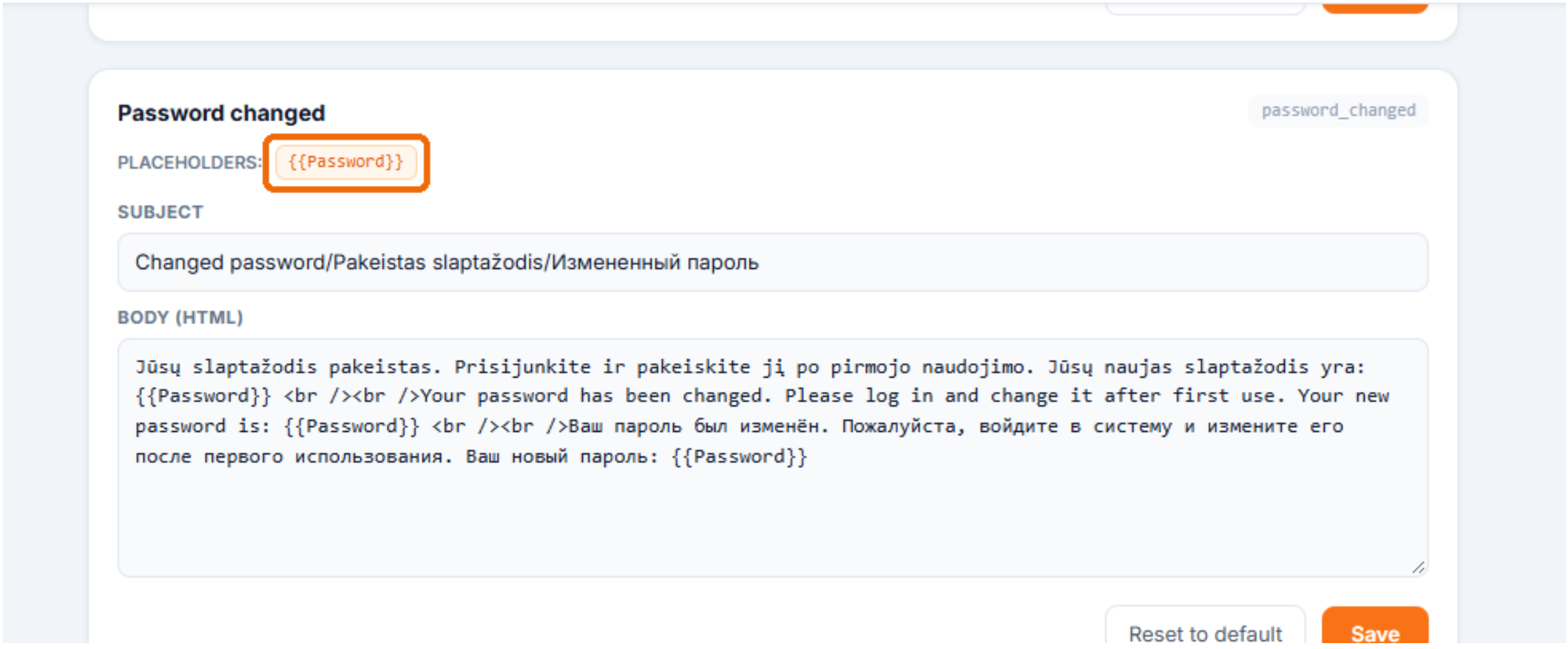
Save or reset



Press Save on the card to store your organization's version of that email; it is used from the next email on. Reset to default removes your version, so the shared default (or the built-in text) is used again. Each card is saved separately.

Email Templates

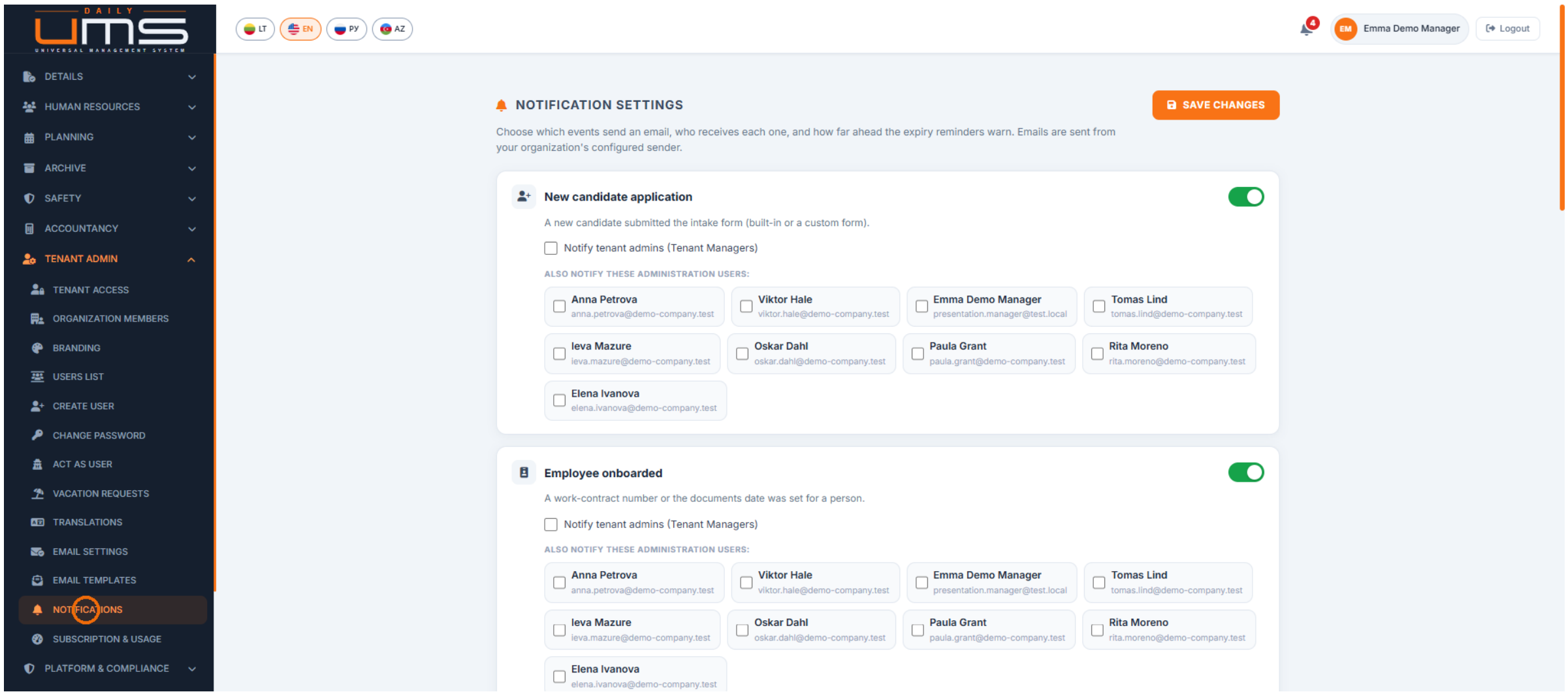
Example: password emails



Password changed is sent by the Change Password page and contains the new password through {{Password}}; Verification code contains the sign-in code through {{Code}}. When you rewrite such templates, always keep these placeholders, otherwise the person receives an email without the password or code they need.

Notifications

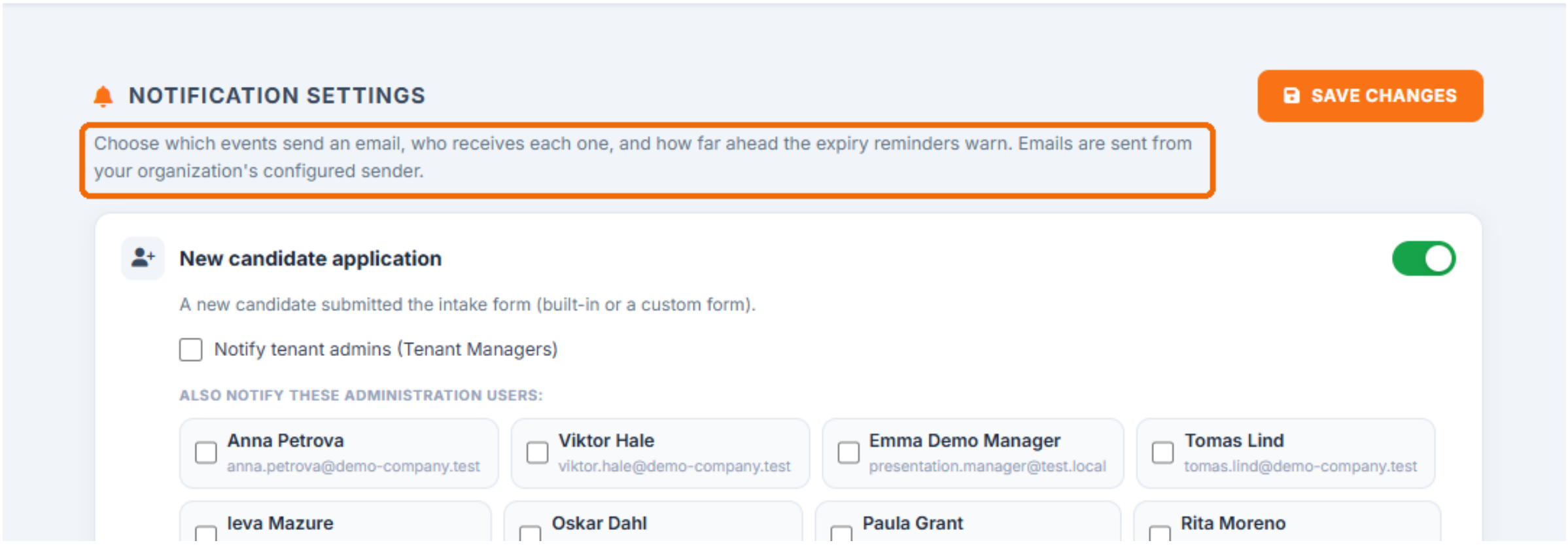
Open Notifications



Open Tenant Admin > Notifications in the side menu. The page lists the events that can send an automatic email, for example a new candidate application, an expiring passport or a safety incident. Names and emails in this lesson are demo placeholders.

Notifications

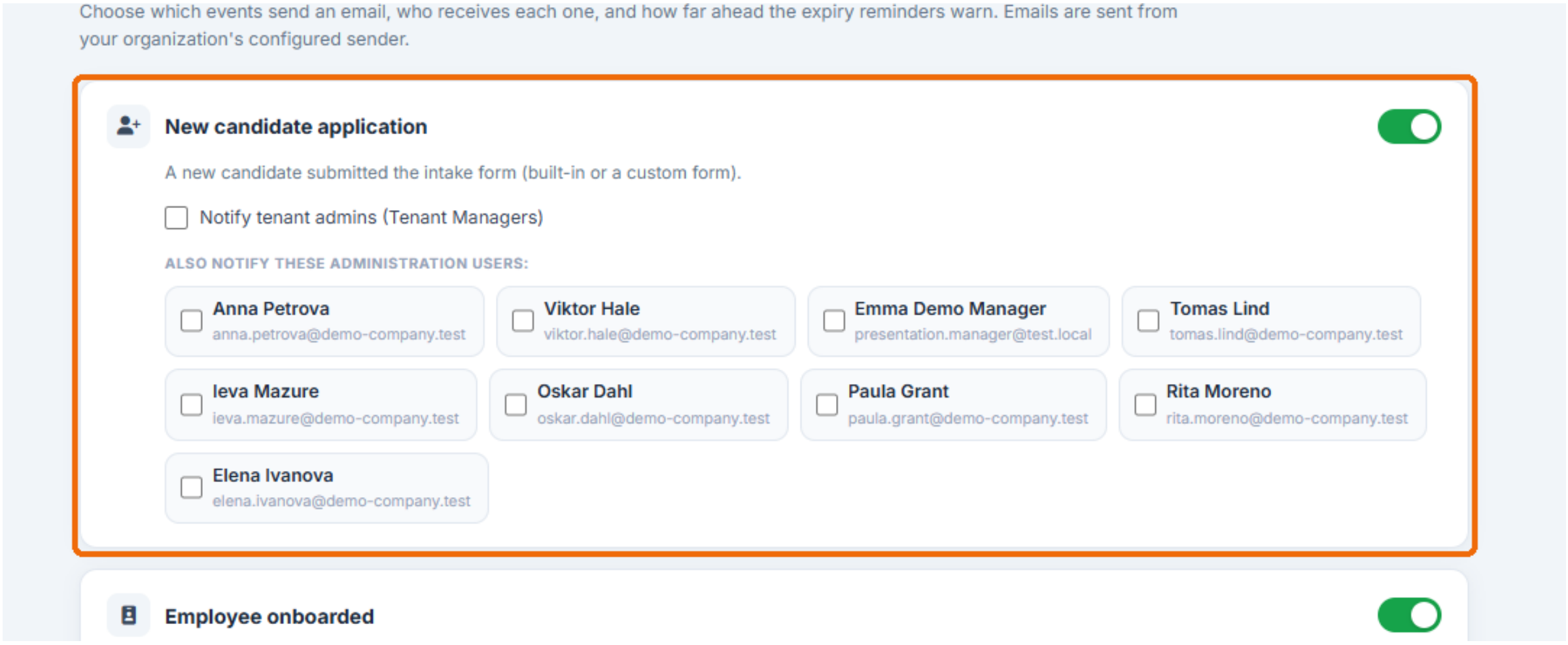
What this page decides



For every event you decide three things: whether the email is sent at all, who receives it, and for expiry reminders how many days in advance. The emails go out from your organization's configured sender, and their wording comes from Email Templates.

Notifications

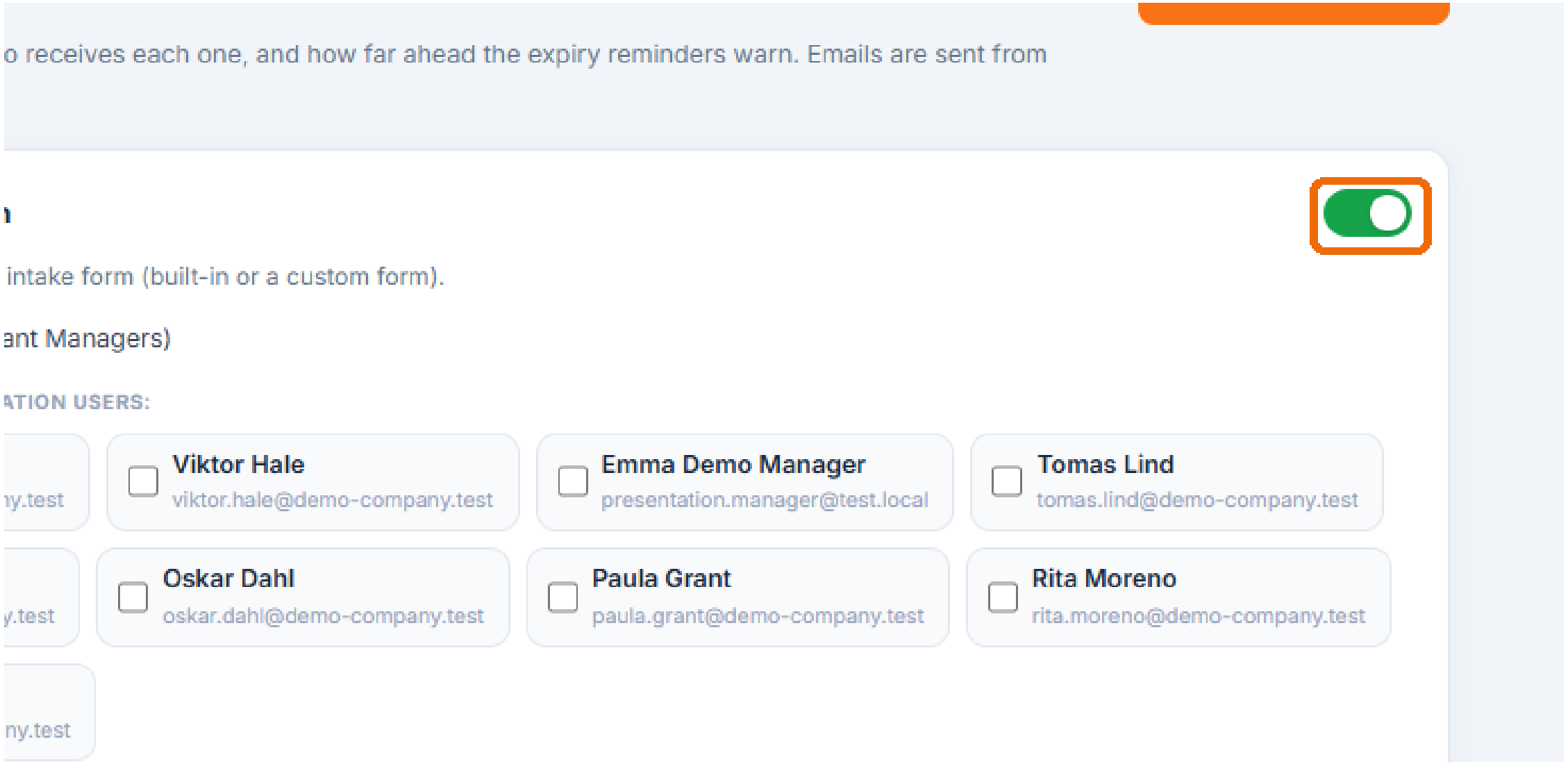
One card per event



There are eight cards: New candidate application, Employee onboarded, Employee offboarded, Passport expiring, Visa / residence permit expiring, Health check due, New safety task assigned and Safety incident / near-miss reported. The grey line under each title explains exactly when it is sent.

Notifications

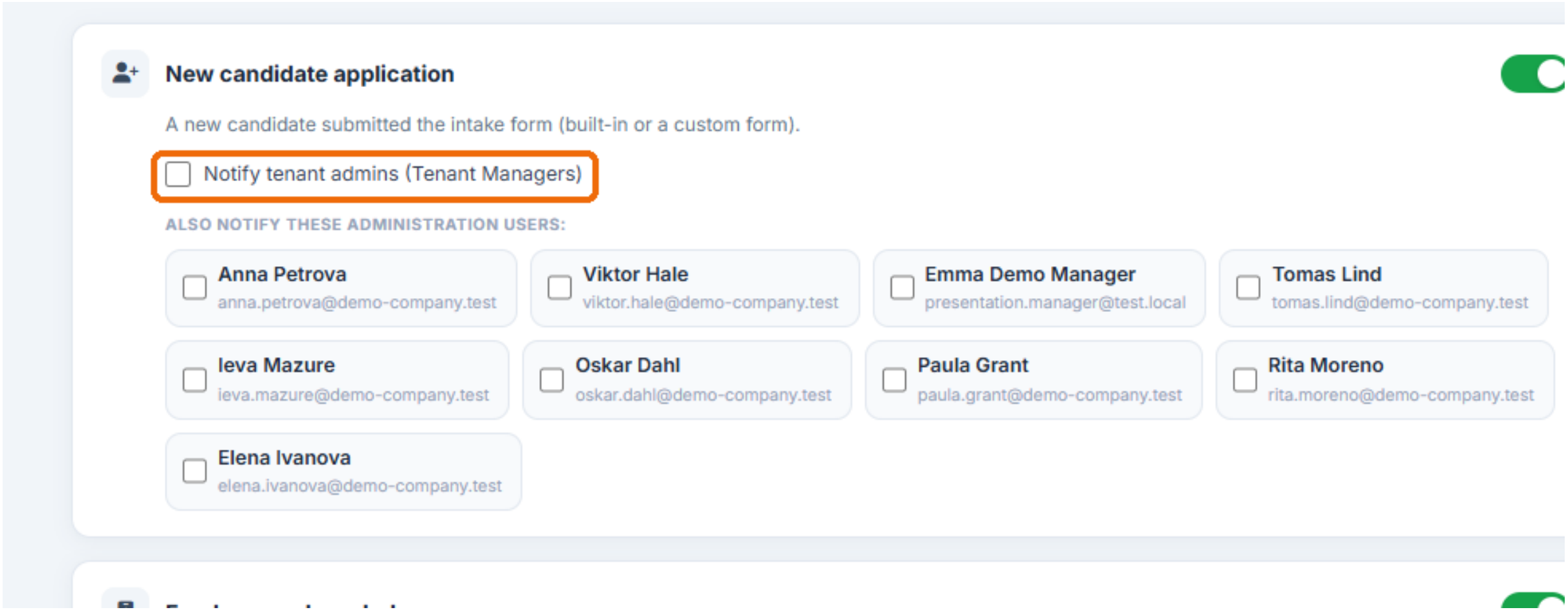
Turn it on or off



The switch in the top-right corner of each card enables or disables that notification. When it is off, no email is sent for that event, whoever is selected below.

Notifications

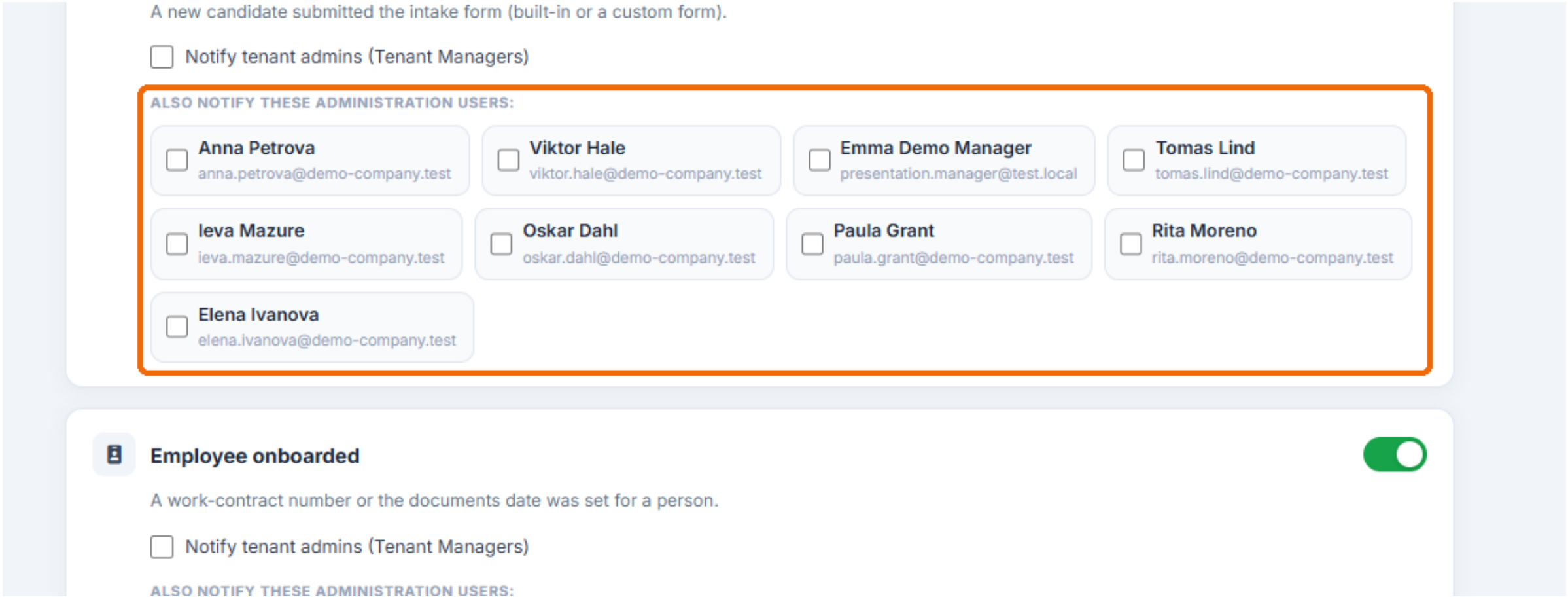
Notify tenant admins



Notify tenant admins (Tenant Managers) sends the email to everyone who has the Tenant Manager role in this organization. It is the simplest choice when the managers should know about every event of this type.

Notifications

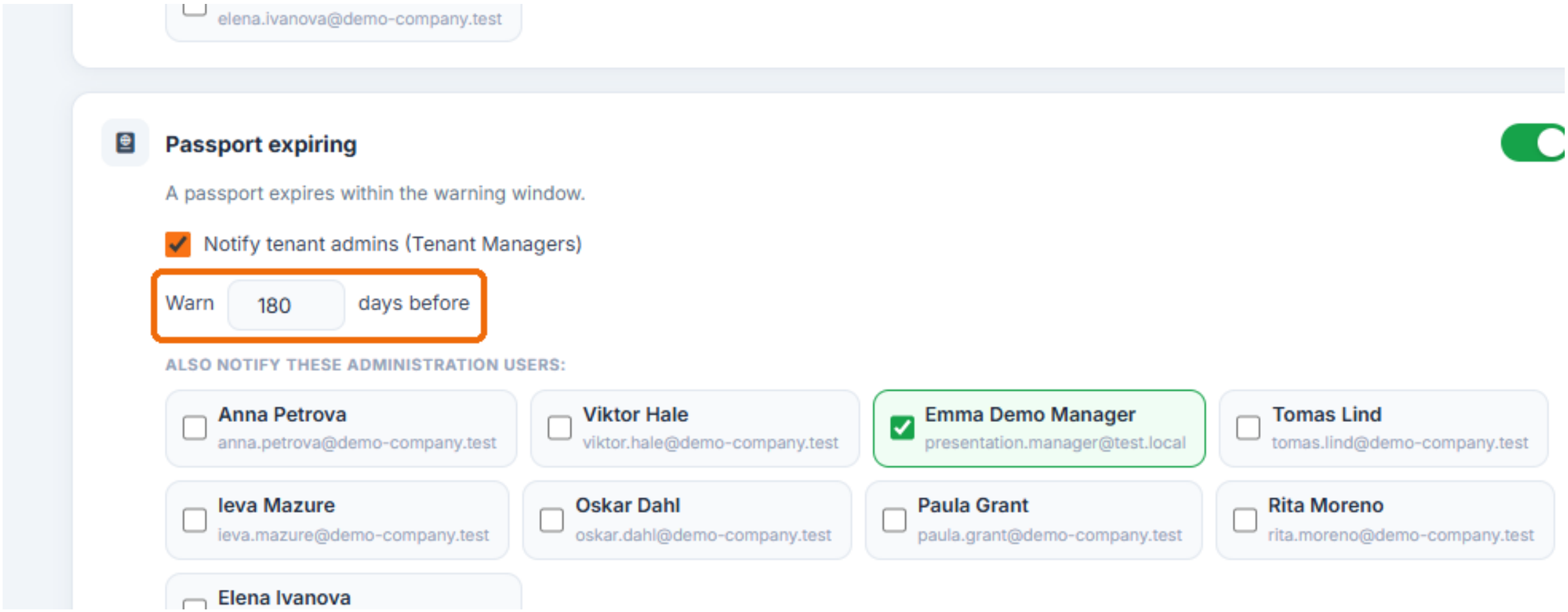
Choose extra recipients



ALSO NOTIFY THESE ADMINISTRATION USERS lists the office users of your organization that have an email address. Tick a person to add them as a recipient of this particular email, for example the safety specialist for incident reports. For New safety task assigned, everyone who gets the task is notified automatically anyway.

Notifications

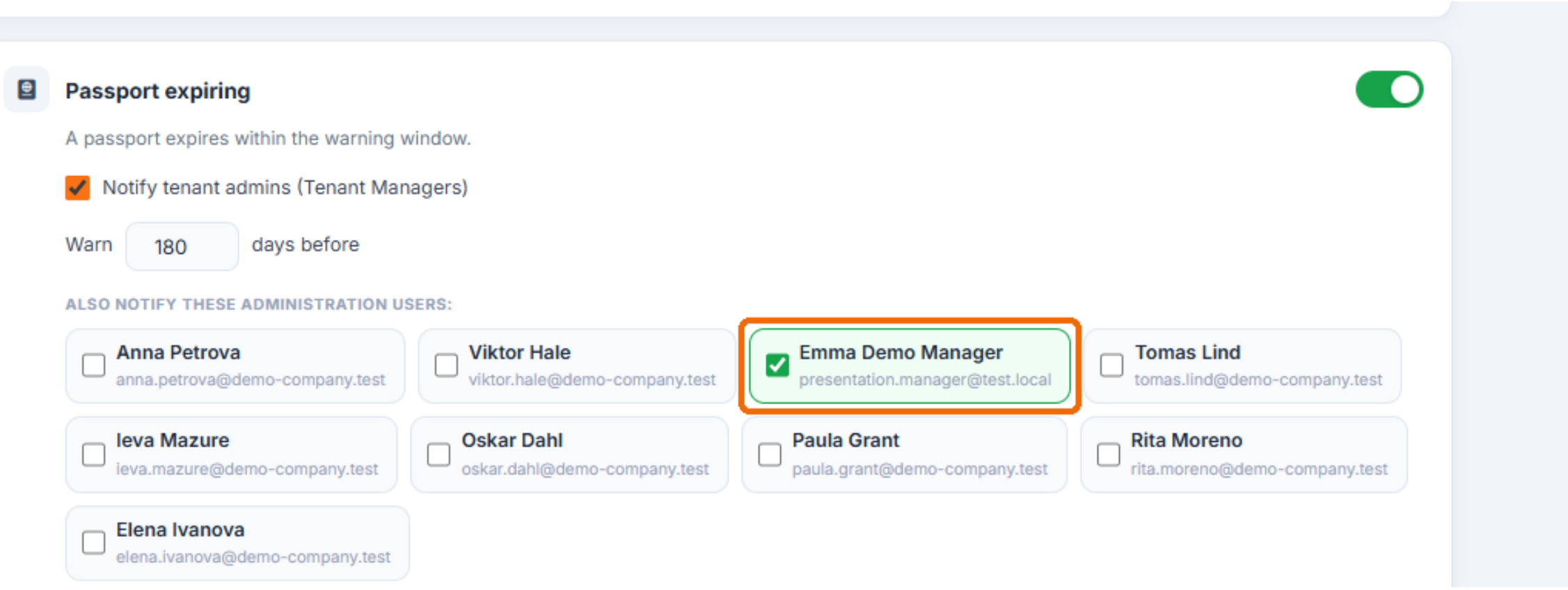
Lead time for reminders



Passport expiring, Visa / residence permit expiring and Health check due are scheduled reminders. Warn ... days before sets how far ahead the email is sent, between 1 and 3650 days. In the demo, reminders go out 180 days before a passport or permit expires, which leaves time to renew it.

Notifications

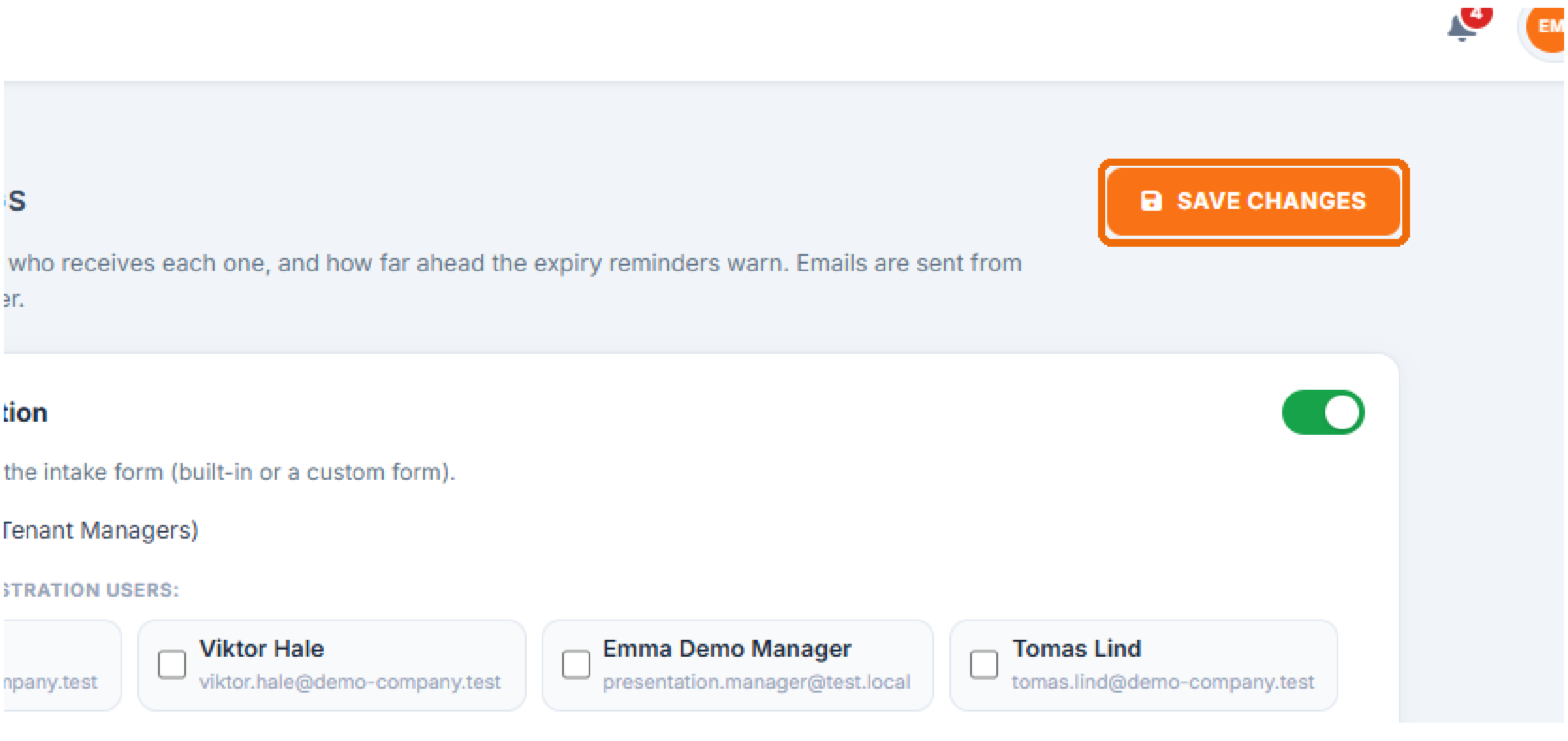
Selected recipients



In the example, Notify tenant admins and Emma Demo Manager are ticked for passport reminders; a selected person is shown in green. Ticking boxes, switching cards or changing days does not send or save anything yet.

Notifications

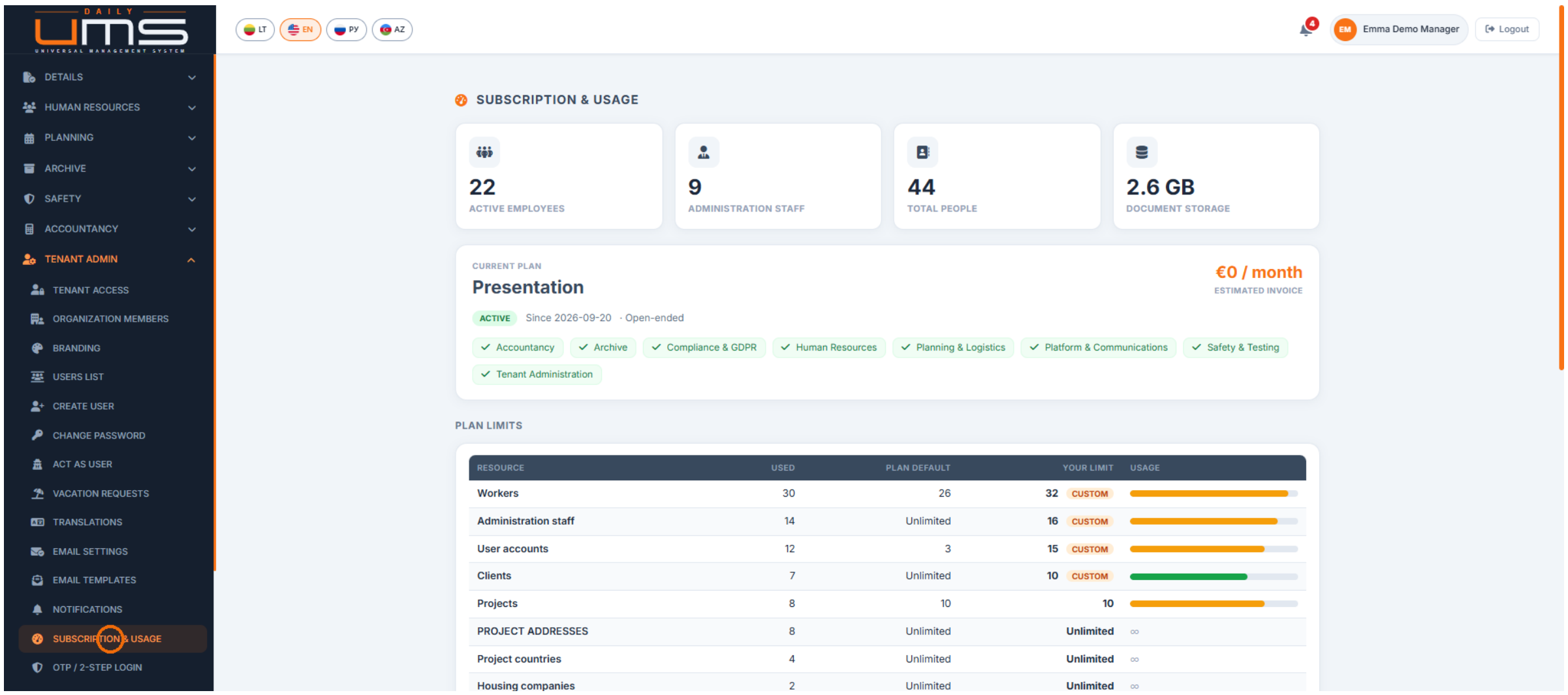
Save changes



When you are done, press SAVE CHANGES at the top (the same button is also at the bottom of the page). All cards are saved together and take effect for the next events and the next reminder run. Leave the page without saving to discard your changes.

Subscription & Usage

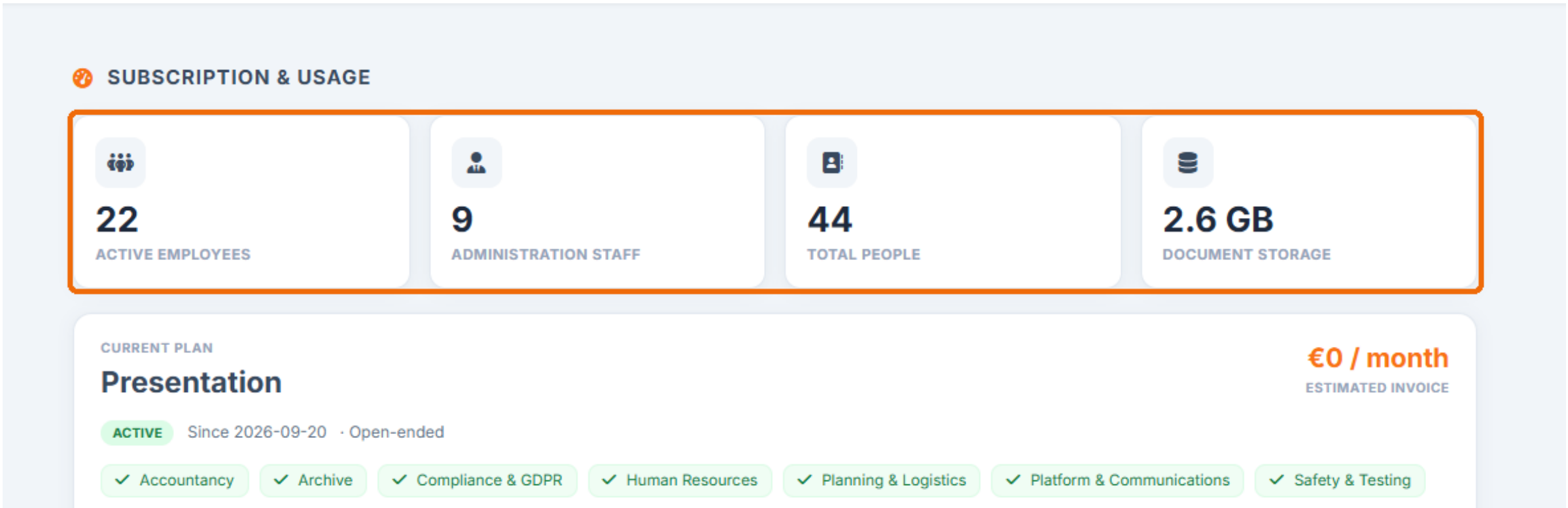
Open Subscription & Usage



Open Tenant Admin > Subscription & Usage in the side menu. The page is read-only for a Tenant Manager: it shows which plan your organization has, what it includes, how close you are to its limits, and which other plans you could request.

Subscription & Usage

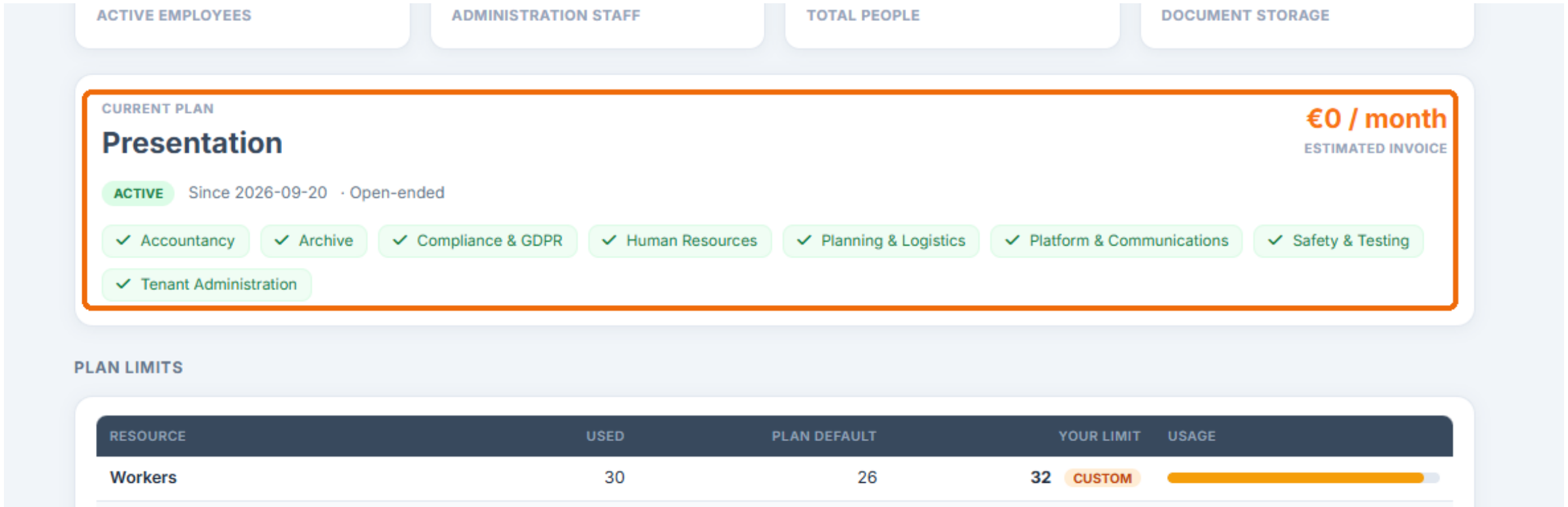
Usage at a glance



The four tiles at the top summarise your organization: ACTIVE EMPLOYEES, ADMINISTRATION STAFF, TOTAL PEOPLE in the database and DOCUMENT STORAGE used by uploaded files. Check them regularly to know when your organization is growing towards the next plan.

Subscription & Usage

Current plan



The CURRENT PLAN card shows the plan name (here Presentation), its status (ACTIVE), the start date and whether it ends (Open-ended). The green tags list the modules included in the plan, such as Human Resources, Planning & Logistics, Safety & Testing or Compliance & GDPR. Menu items of modules that are not included are hidden.

Subscription & Usage

Estimated invoice

9
ADMINISTRATION STAFF

44
TOTAL PEOPLE

2.6 GB
DOCUMENT STORAGE

€0 / month
ESTIMATED INVOICE

mpliance & GDPR ✓ Human Resources ✓ Planning & Logistics ✓ Platform & Communications ✓ Safety & Testing

USED	PLAN DEFAULT	YOUR LIMIT	USAGE
30	26	32 CUSTOM	

ESTIMATED INVOICE shows the monthly price of your current plan. The demo organization uses a free presentation plan, so it shows 0 euro per month.

Subscription & Usage

Plan limits

PLAN LIMITS

RESOURCE	USED	PLAN DEFAULT	YOUR LIMIT	USAGE
Workers	30	26	32 CUSTOM	
Administration staff	14	Unlimited	16 CUSTOM	
User accounts	12	3	15 CUSTOM	
Clients	7	Unlimited	10 CUSTOM	
Projects	8	10	10	
PROJECT ADDRESSES	8	Unlimited	Unlimited	∞
Project countries	4	Unlimited	Unlimited	∞
Housing companies	2	Unlimited	Unlimited	∞
Houses	9	Unlimited	11 CUSTOM	

PLAN LIMITS lists each resource that is counted, for example Workers, Administration staff, User accounts, Clients, Projects, Houses, Safety tests and Document templates. USED is your current number, PLAN DEFAULT the limit that comes with the plan, YOUR LIMIT the limit that applies to you, and USAGE shows it as a bar.

Subscription & Usage

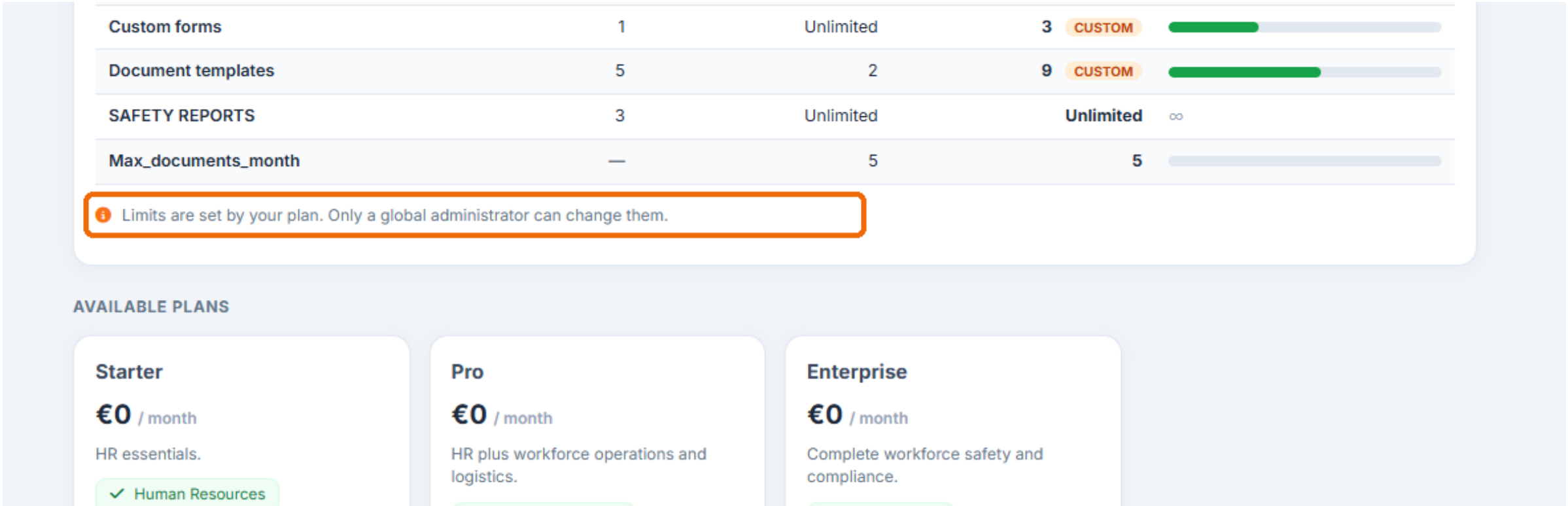
Custom limits and warnings

ED	PLAN DEFAULT	YOUR LIMIT	USAGE
30	26	32 CUSTOM	
14	Unlimited	16 CUSTOM	
12	3	15 CUSTOM	
7	Unlimited	10 CUSTOM	
8	10	10	
8	Unlimited	Unlimited	∞
4	Unlimited	Unlimited	∞
2	Unlimited	Unlimited	∞

A CUSTOM badge means the platform administrator has set a different limit for your organization than the plan default, as for Workers (32 instead of 26). The bar is green while there is room, orange from 80% of the limit and red at 100%. Unlimited resources show an infinity sign. When a limit is reached, adding more of that resource is blocked until the plan or limit is raised.

Subscription & Usage

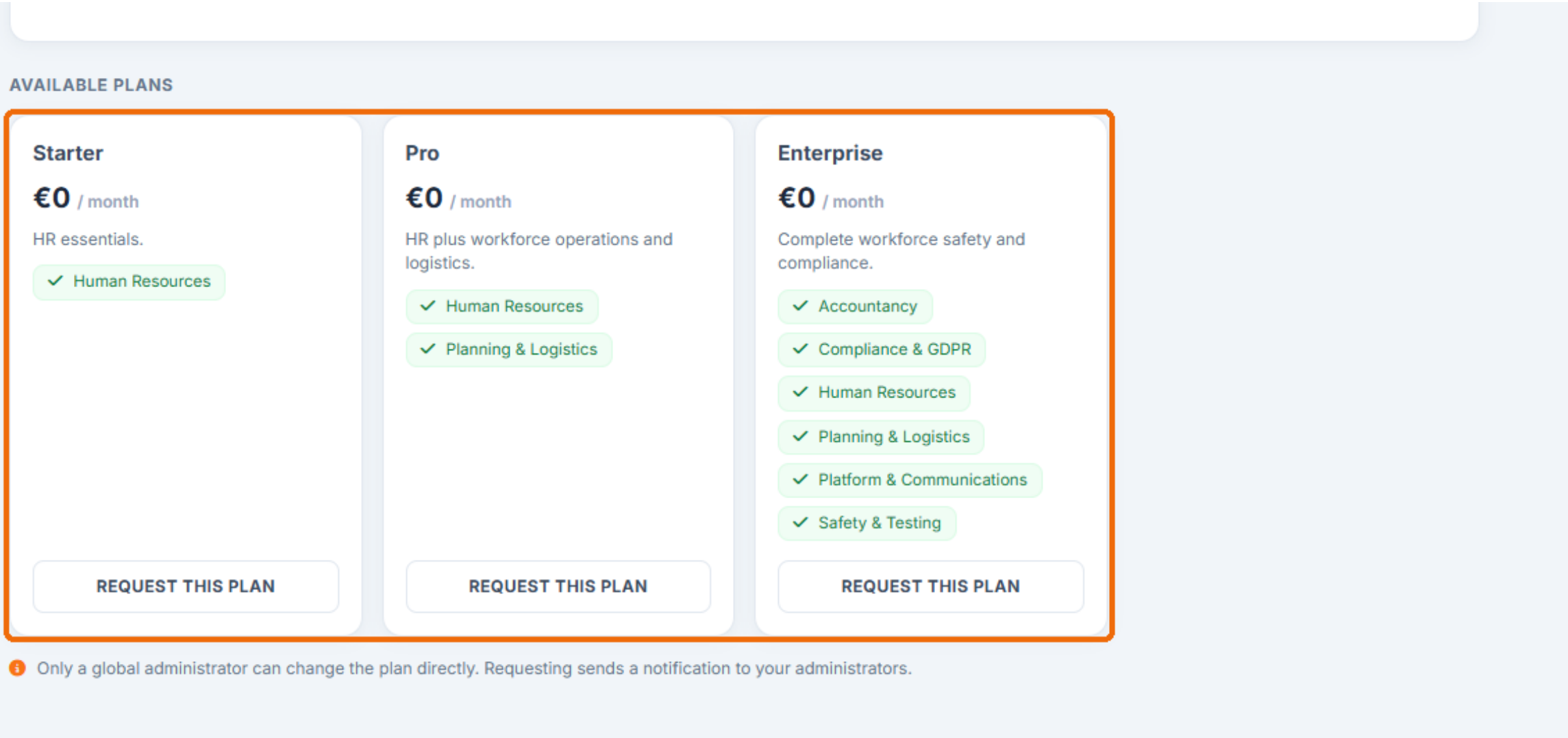
Who changes limits



The note under the table reminds you that limits come from your plan and only the platform (global) administrator can change them. If you regularly hit a limit, ask for a bigger limit or another plan.

Subscription & Usage

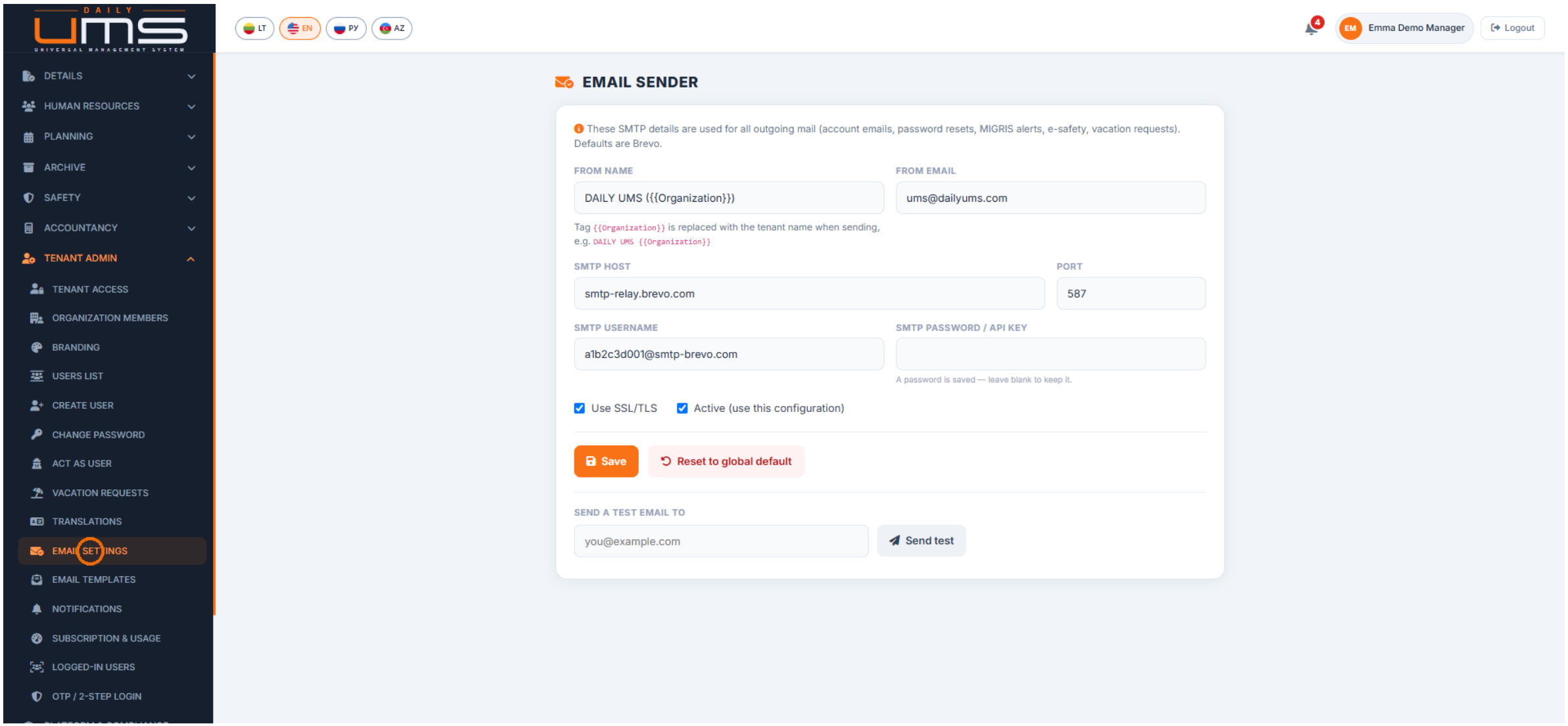
Request another plan



AVAILABLE PLANS shows the other plans with their price, description and included modules: Starter (HR essentials), Pro (adds planning and logistics) and Enterprise (complete workforce safety and compliance). REQUEST THIS PLAN does not switch the plan; it sends a notification to your administrators, who make the change.

Email Settings (Email Sender)

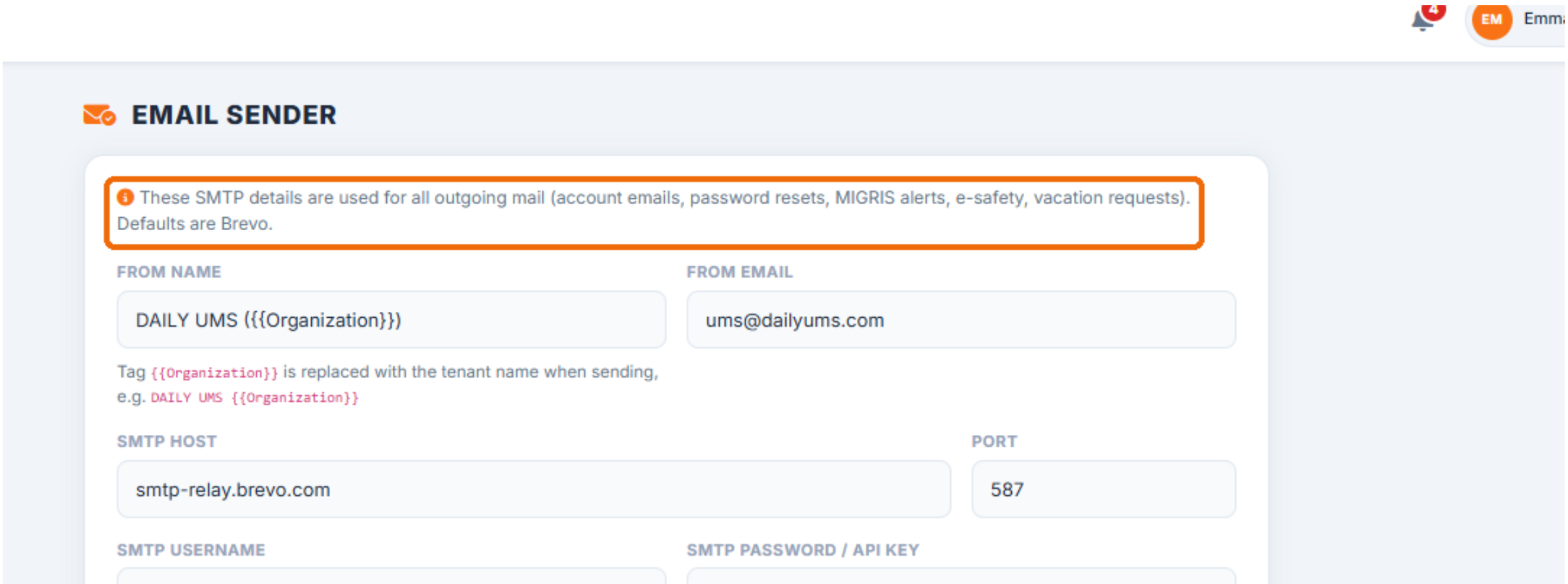
Open Email Settings



Open Tenant Admin > Email Settings in the side menu. The page is called EMAIL SENDER. It is available when your plan includes the Email sender module; without it the page shows a lock and every email goes out from the shared Daily UMS sender.

Email Settings (Email Sender)

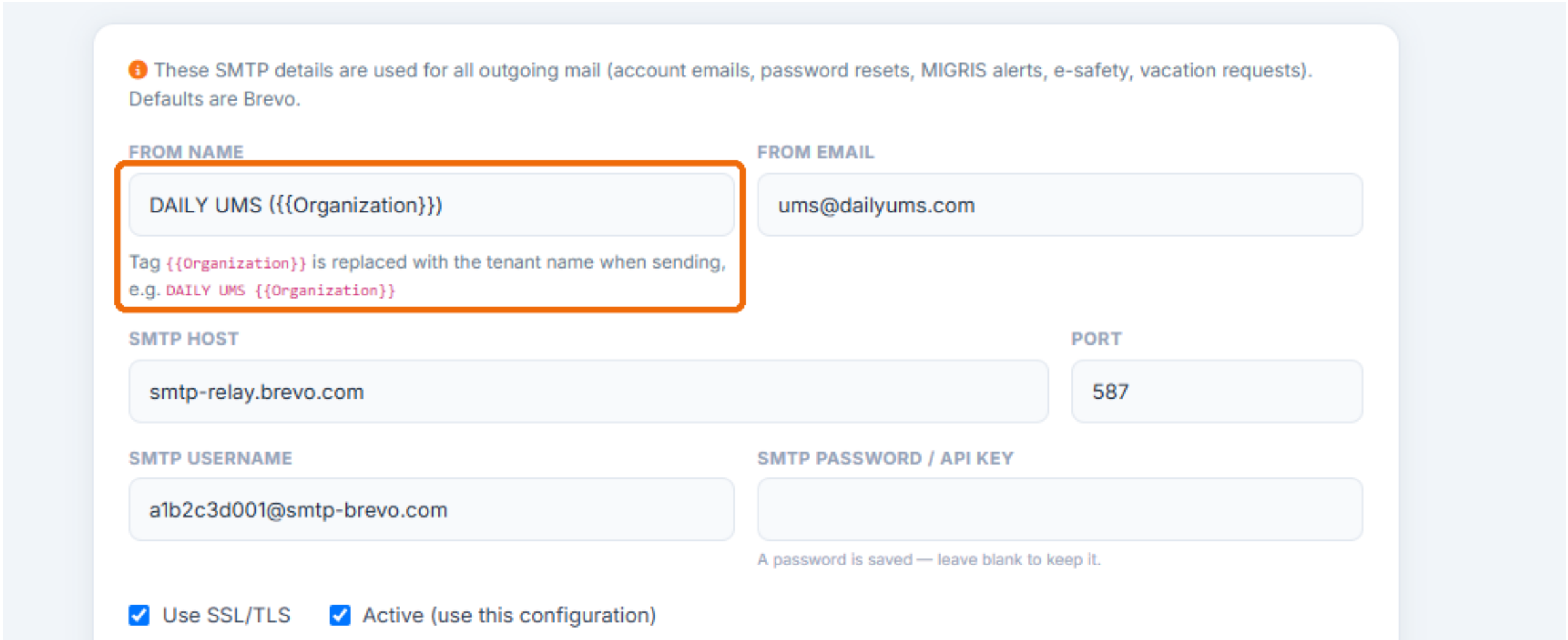
What it is used for



Every automatic email of your organization uses these details: login and account emails, password resets, MIGRIS alerts, e-safety tasks, vacation requests and the notifications you configure. The defaults point to Brevo, the email service Daily UMS uses.

Email Settings (Email Sender)

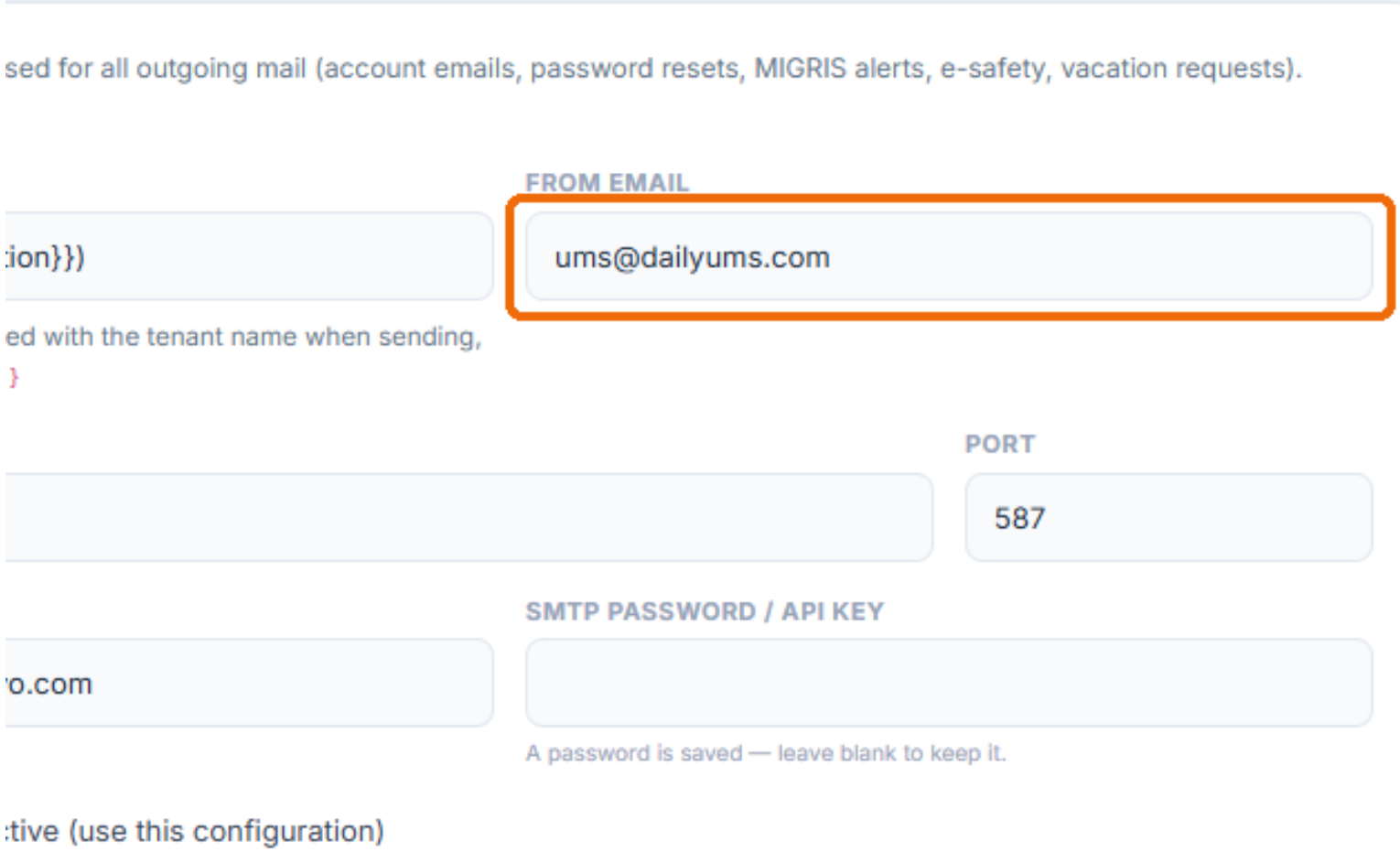
Sender name



FROM NAME is the sender name shown in the recipient's inbox. You can type the tag {{Organization}}; it is replaced with your organization's name when an email is sent, for example DAILY UMS (Presentation Tenant).

Email Settings (Email Sender)

Sender address



FROM EMAIL is the address emails are sent from, for example ums@yourcompany.com. Use an address of a domain that your email service is allowed to send for (verified in Brevo or your SMTP provider), otherwise messages may land in spam or be rejected.

Email Settings (Email Sender)

Mail server

Tag {{Organization}} is replaced with the tenant name when sending, e.g. DAILY UMS {{Organization}}

SMTP HOST: smtp-relay.brevo.com

PORT: 587

SMTP USERNAME: a1b2c3d001@smtp-brevo.com

SMTP PASSWORD / API KEY

A password is saved — leave blank to keep it.

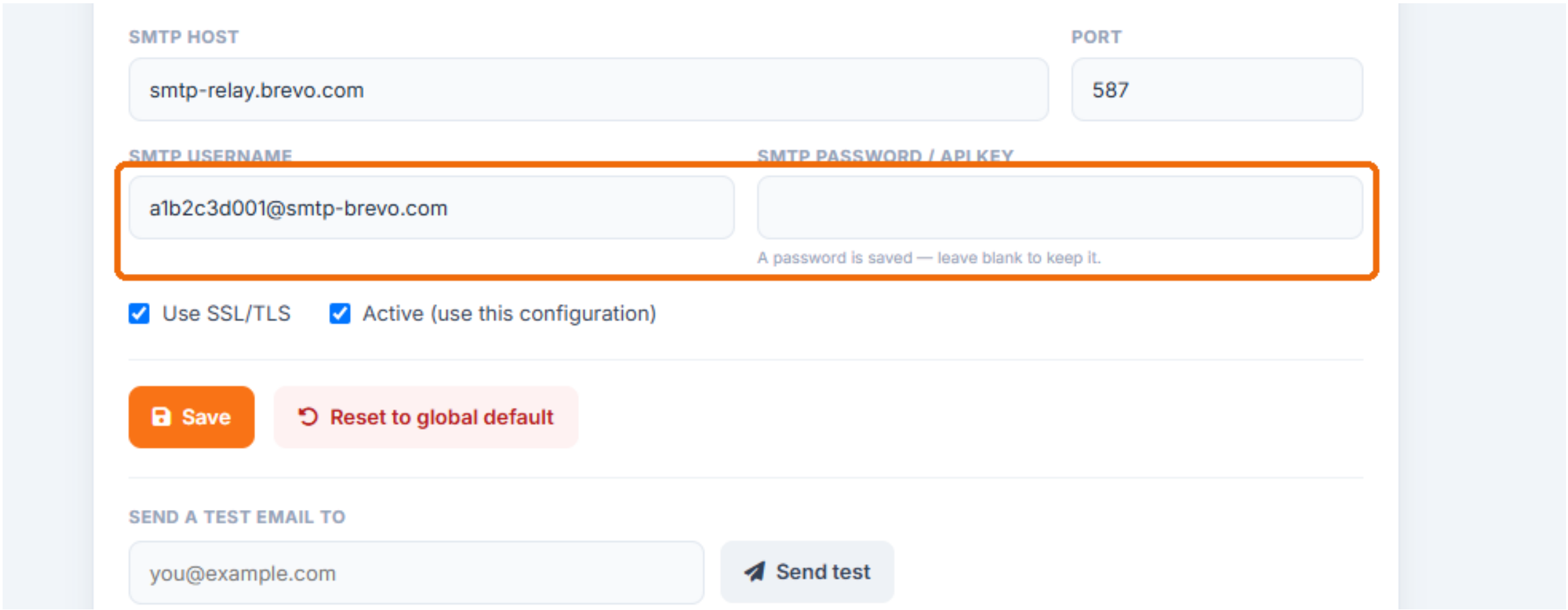
Use SSL/TLS Active (use this configuration)

Save Reset to global default

SMTP HOST is the address of the outgoing mail server and PORT its port. For Brevo these are smtp-relay.brevo.com and 587. If you use another provider (Microsoft 365, Google Workspace, your hosting), copy the values from its SMTP instructions.

Email Settings (Email Sender)

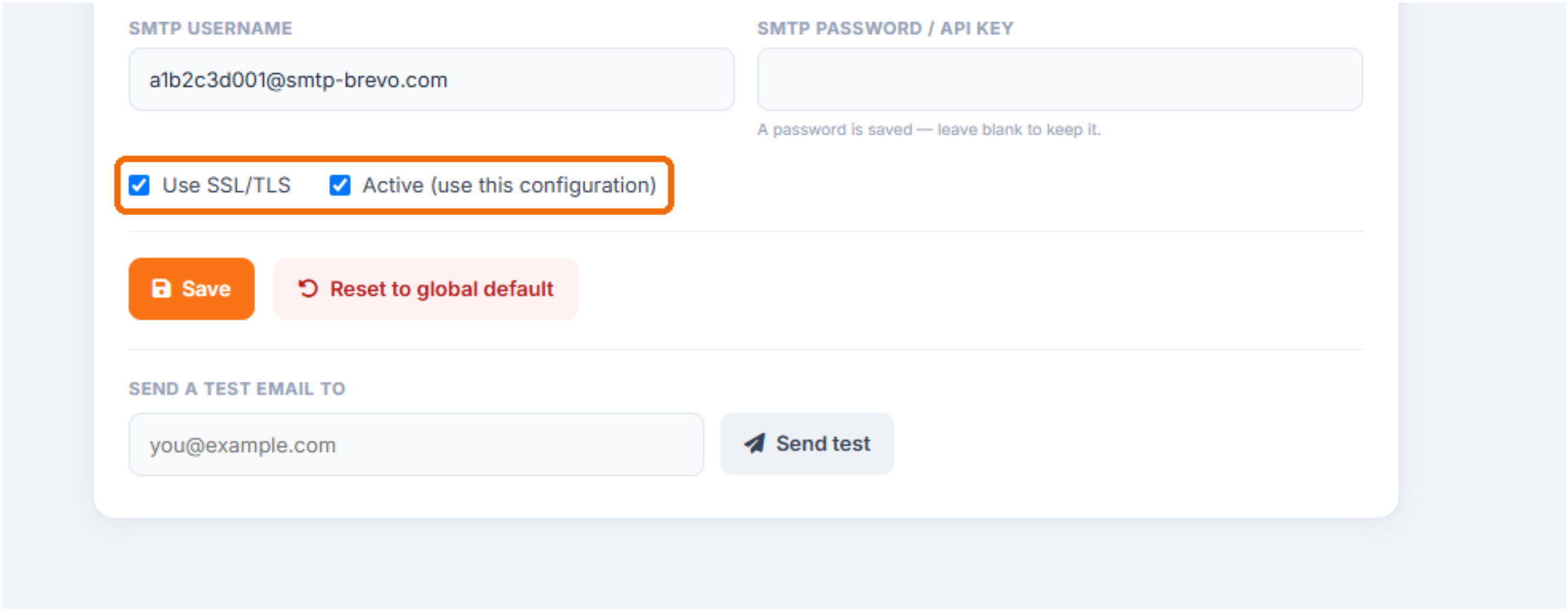
Login and key



SMTP USERNAME and SMTP PASSWORD / API KEY are the credentials from your email provider (for Brevo: the SMTP login and an SMTP key). For security the saved password is never displayed; the note A password is saved means one is stored. Leave the field blank to keep it, or type a new one to replace it.

Email Settings (Email Sender)

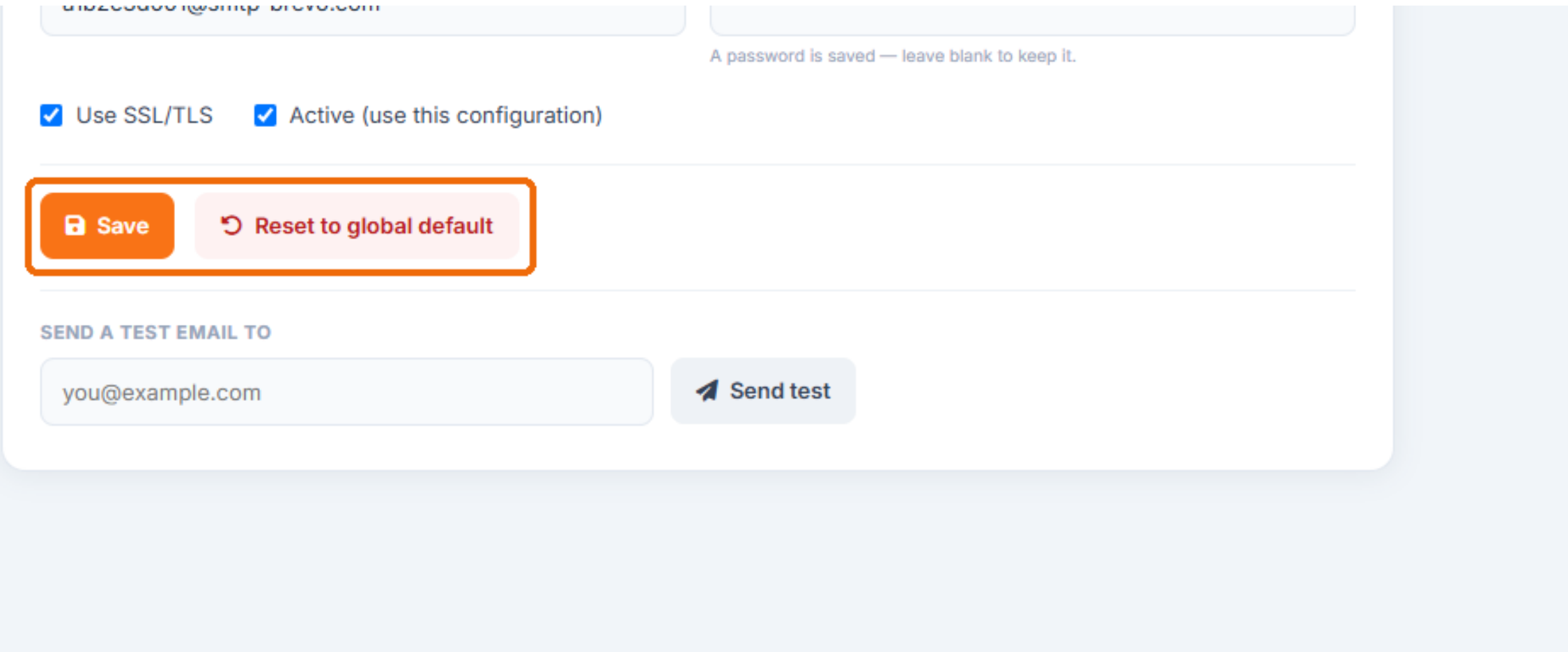
Security and status



Use SSL/TLS encrypts the connection to the mail server; keep it ticked unless your provider says otherwise. Active (use this configuration) switches your own sender on; untick it to fall back to the shared default sender without losing your settings.

Email Settings (Email Sender)

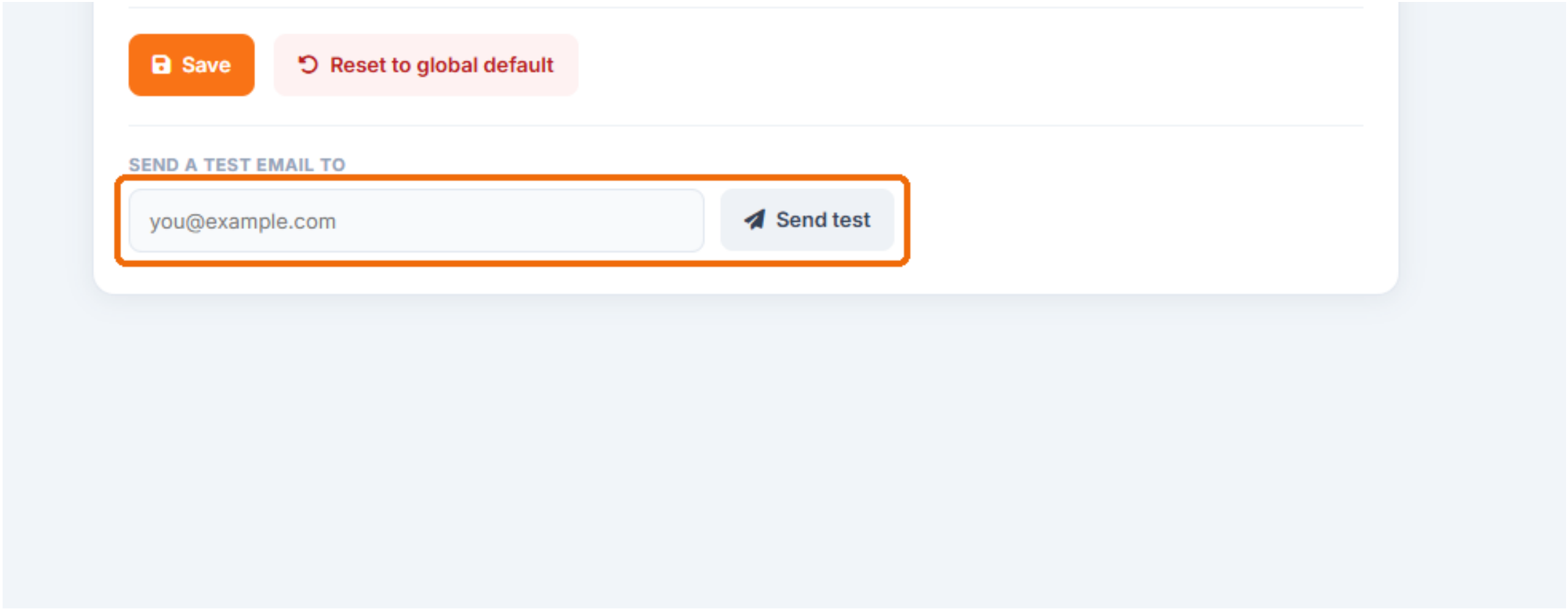
Save or reset



Press Save to store your settings; the next email already uses them. Reset to global default deletes your organization's sender after a confirmation, so emails go out from the shared Daily UMS sender again.

Email Settings (Email Sender)

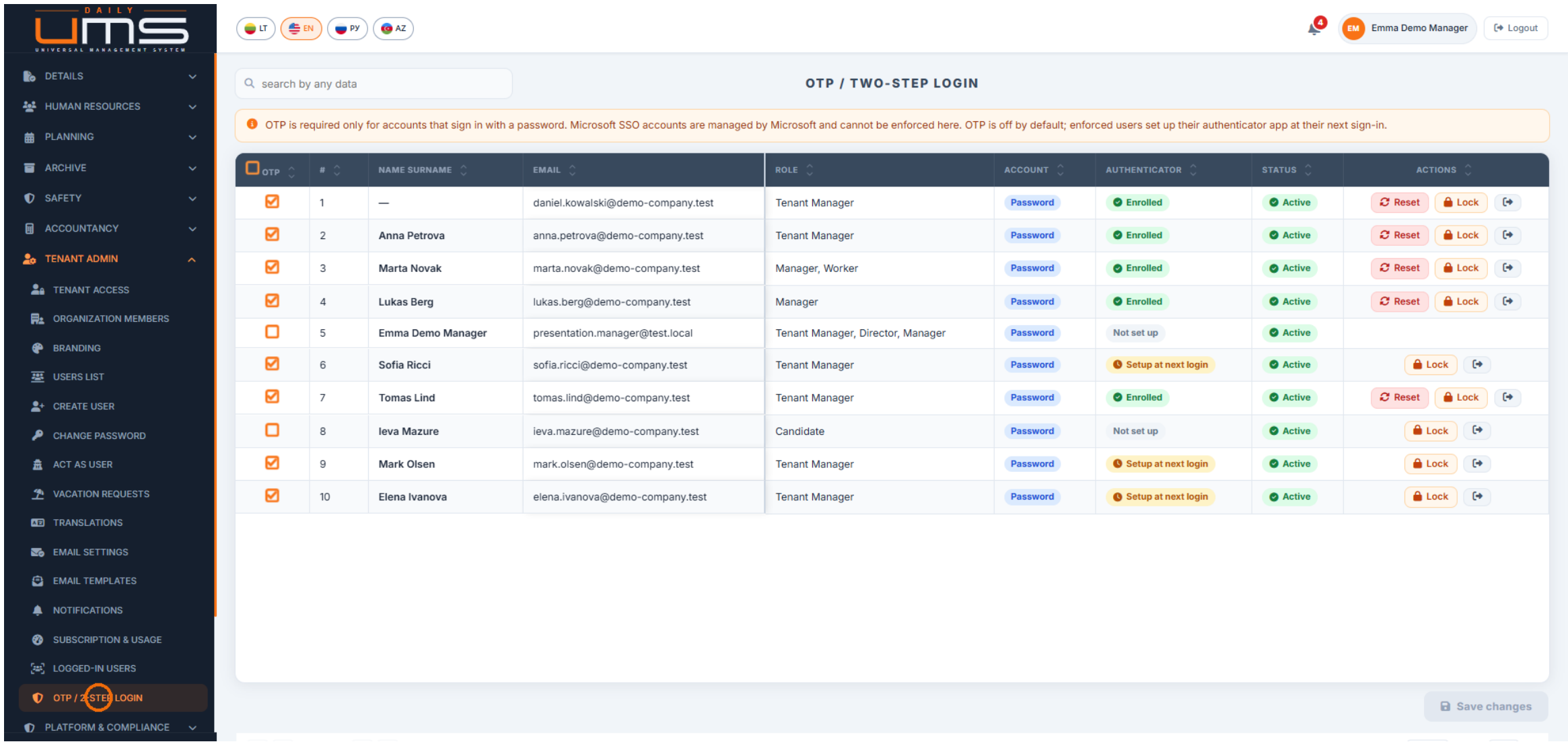
Send a test email



After saving, type your own email address in SEND A TEST EMAIL TO and press Send test. If the test arrives, the sender is set up correctly; if not, the message under the button explains the error (for example wrong password or a blocked port). Always send a test after changing the settings.

OTP / 2-Step Login

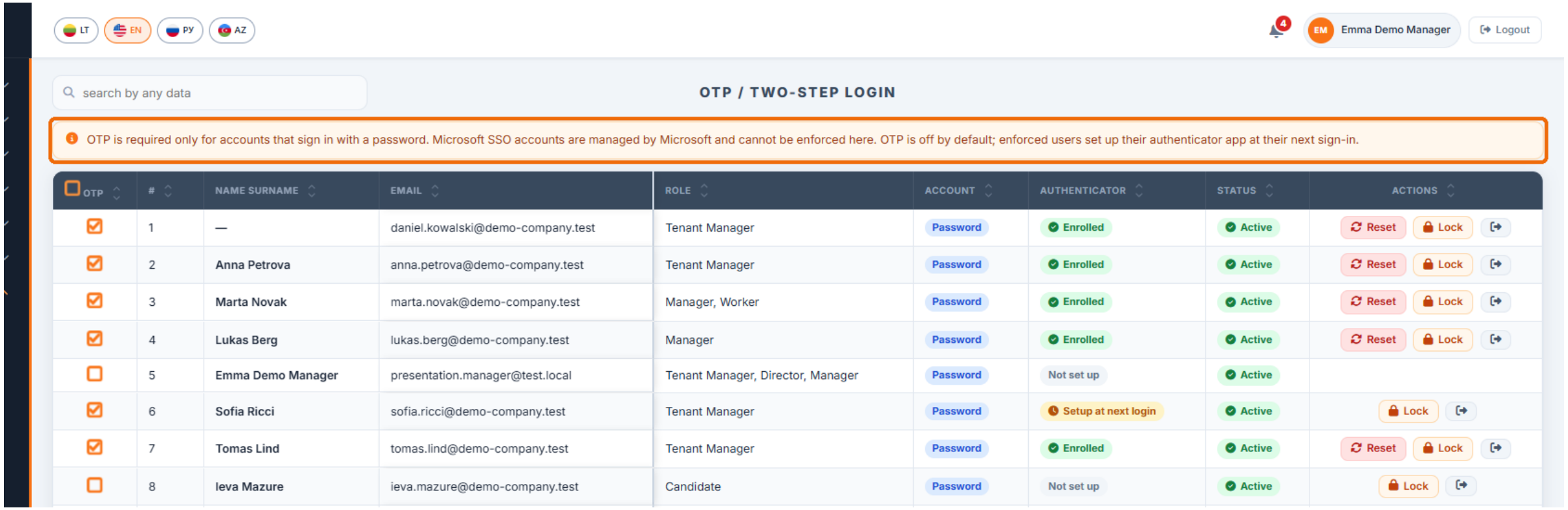
Open OTP / 2-step login



Open Tenant Admin > OTP / 2-step login in the side menu. With OTP (one-time password) switched on, a person signs in with their password AND a 6-digit code from an authenticator app on their phone (for example Microsoft or Google Authenticator). A stolen password alone is then no longer enough. Names and emails in this lesson are demo placeholders.

OTP / 2-Step Login

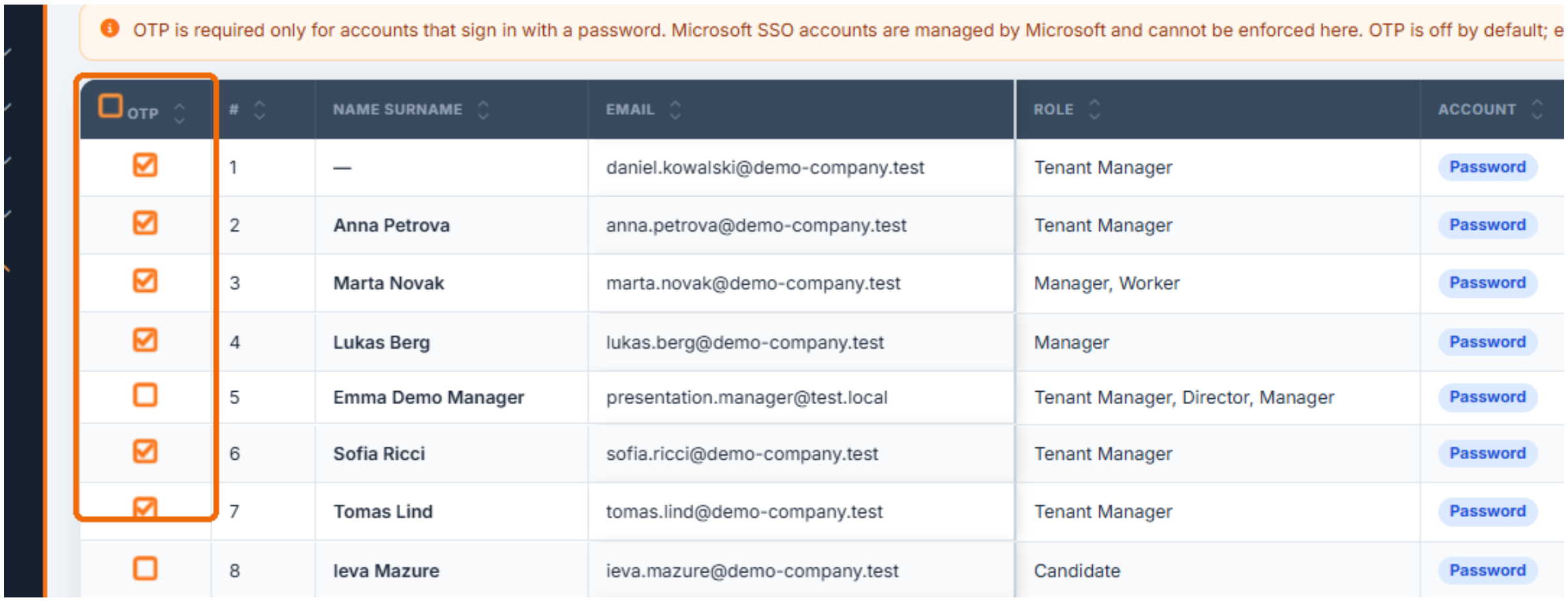
Who OTP applies to



The orange note sums up the rules: OTP is only needed for accounts that sign in with a password. Accounts that use Microsoft sign-in (SSO) are protected by Microsoft and cannot be enforced here. OTP is off by default; a person you enforce it for sets up the authenticator app at their next sign-in.

OTP / 2-Step Login

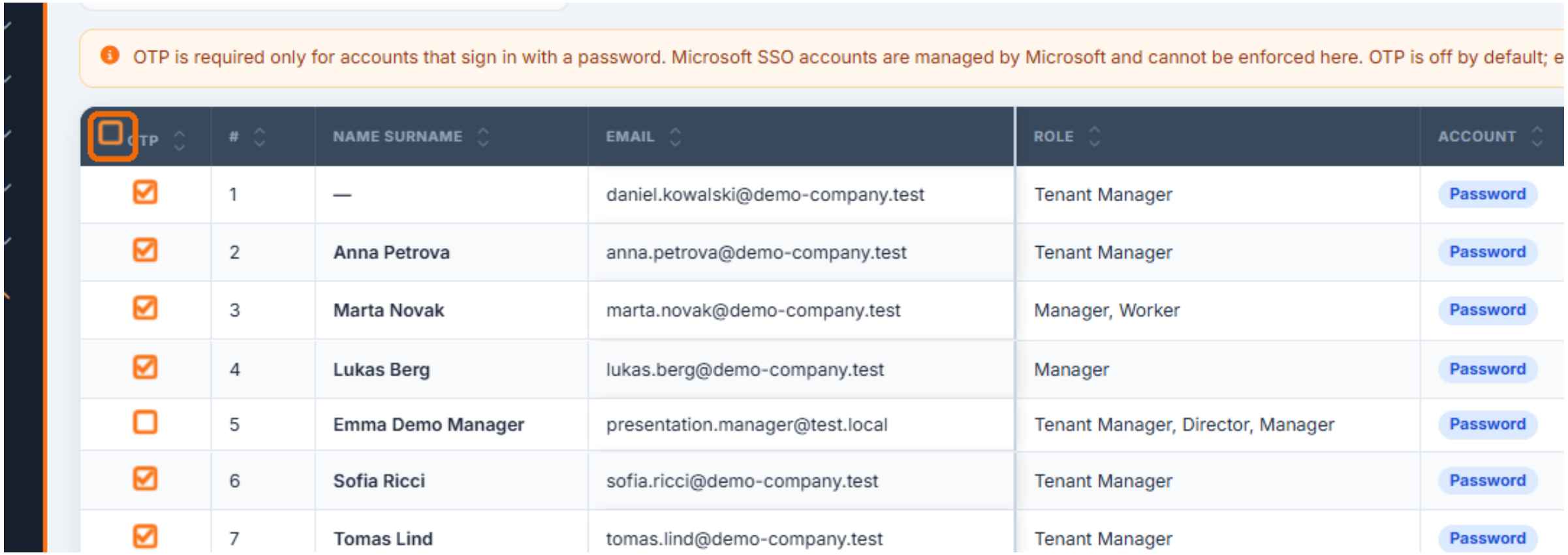
Enforce OTP per person



Each row is one login of your organization. A ticked box in the OTP column means the person must use an authenticator code when signing in. Tick or untick boxes to change who needs it; nothing is saved until you press Save changes. Use the search box to find people quickly.

OTP / 2-Step Login

Select everyone



The checkbox in the OTP header selects or clears all rows on the page in one click, for example to require two-step sign-in for everybody.

OTP / 2-Step Login

Account type

rosoft and cannot be enforced here. OTP is off by default; enforced users set up their authenticator app at their next sign-in.

LE	ACCOUNT	AUTHENTICATOR	STATUS	ACTIONS
hant Manager	Password	Enrolled	Active	Reset Lock
hant Manager	Password	Enrolled	Active	Reset Lock
nager, Worker	Password	Enrolled	Active	Reset Lock
nager	Password	Enrolled	Active	Reset Lock
hant Manager, Director, Manager	Password	Not set up	Active	
hant Manager	Password	Setup at next login	Active	Lock
hant Manager	Password	Enrolled	Active	Reset Lock

ACCOUNT tells you how each person signs in. Password accounts can be enforced. Microsoft (SSO) accounts show a dash in the OTP column, because their two-step sign-in is managed in Microsoft 365.

OTP / 2-Step Login

Authenticator status

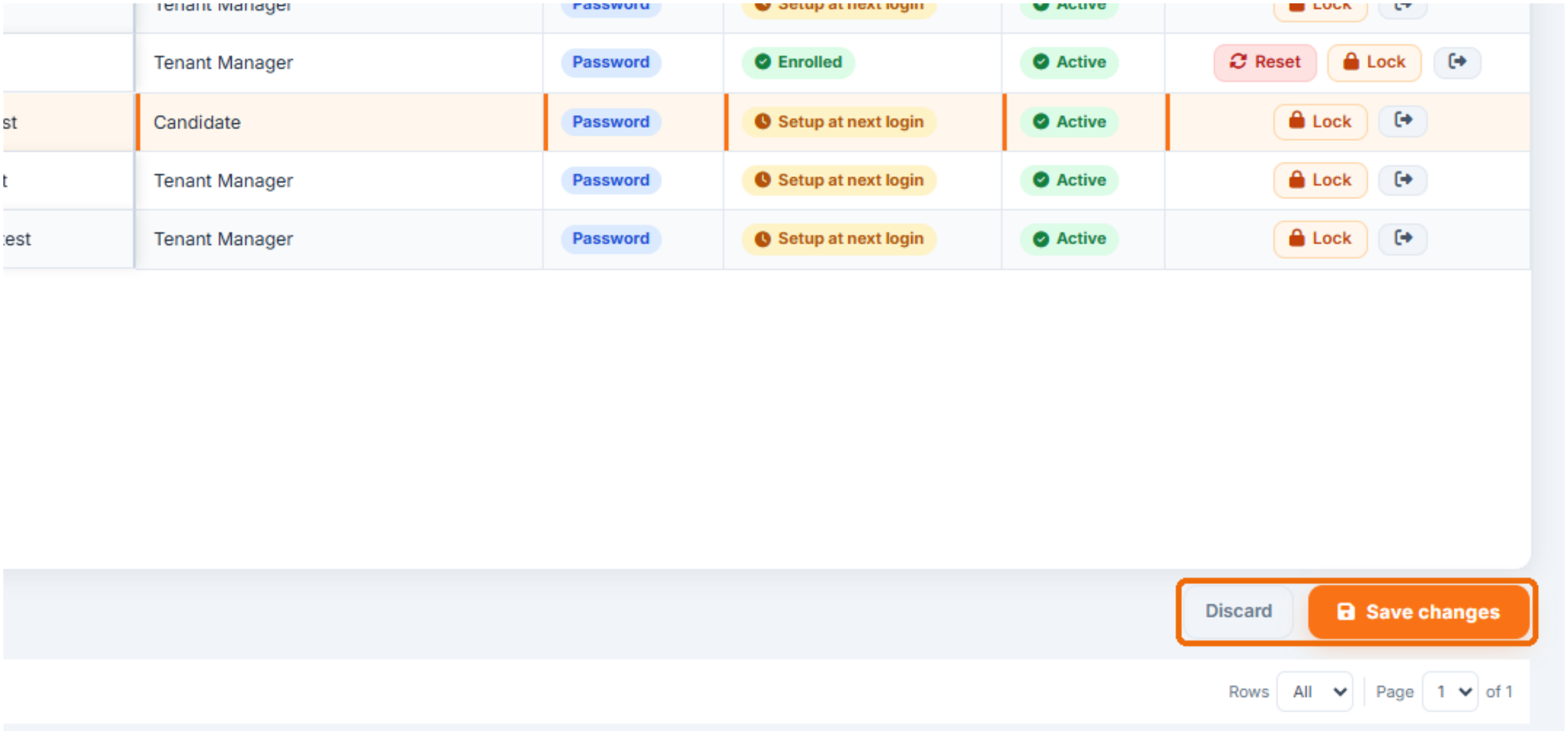
rosoft and cannot be enforced here. OTP is off by default; enforced users set up their authenticator app at their next sign-in.

LE	ACCOUNT	AUTHENTICATOR	STATUS	ACTIONS
ıant Manager	Password	Enrolled	Active	Reset Lock
ıant Manager	Password	Enrolled	Active	Reset Lock
ınager, Worker	Password	Enrolled	Active	Reset Lock
ınager	Password	Enrolled	Active	Reset Lock
ıant Manager, Director, Manager	Password	Not set up	Active	
ıant Manager	Password	Setup at next login	Active	Lock
ıant Manager	Password	Enrolled	Active	Reset Lock
ndidate	Password	Not set up	Active	Lock

AUTHENTICATOR shows the setup state: Enrolled means the person already uses an authenticator app, Setup at next login means OTP is required but the app is not linked yet (they will be guided through it at their next sign-in), and Not set up means OTP is not required. STATUS shows whether the account is Active or locked.

OTP / 2-Step Login

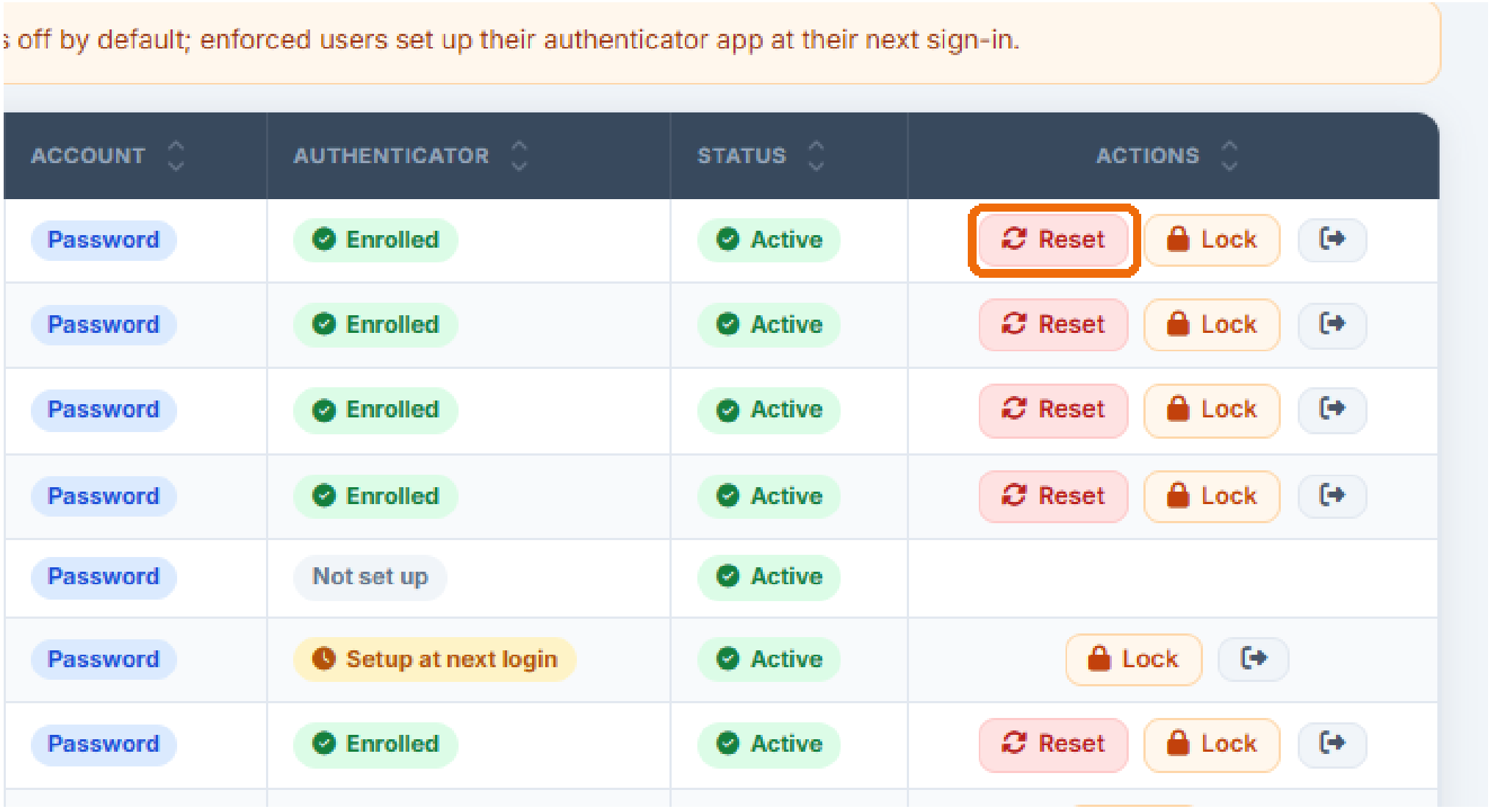
Save your changes



Every row you change is highlighted in orange and the counter at the bottom shows how many unsaved changes you have. Press Save changes to apply them, or Discard to go back. If you try to leave the page with unsaved changes, the app asks first.

OTP / 2-Step Login

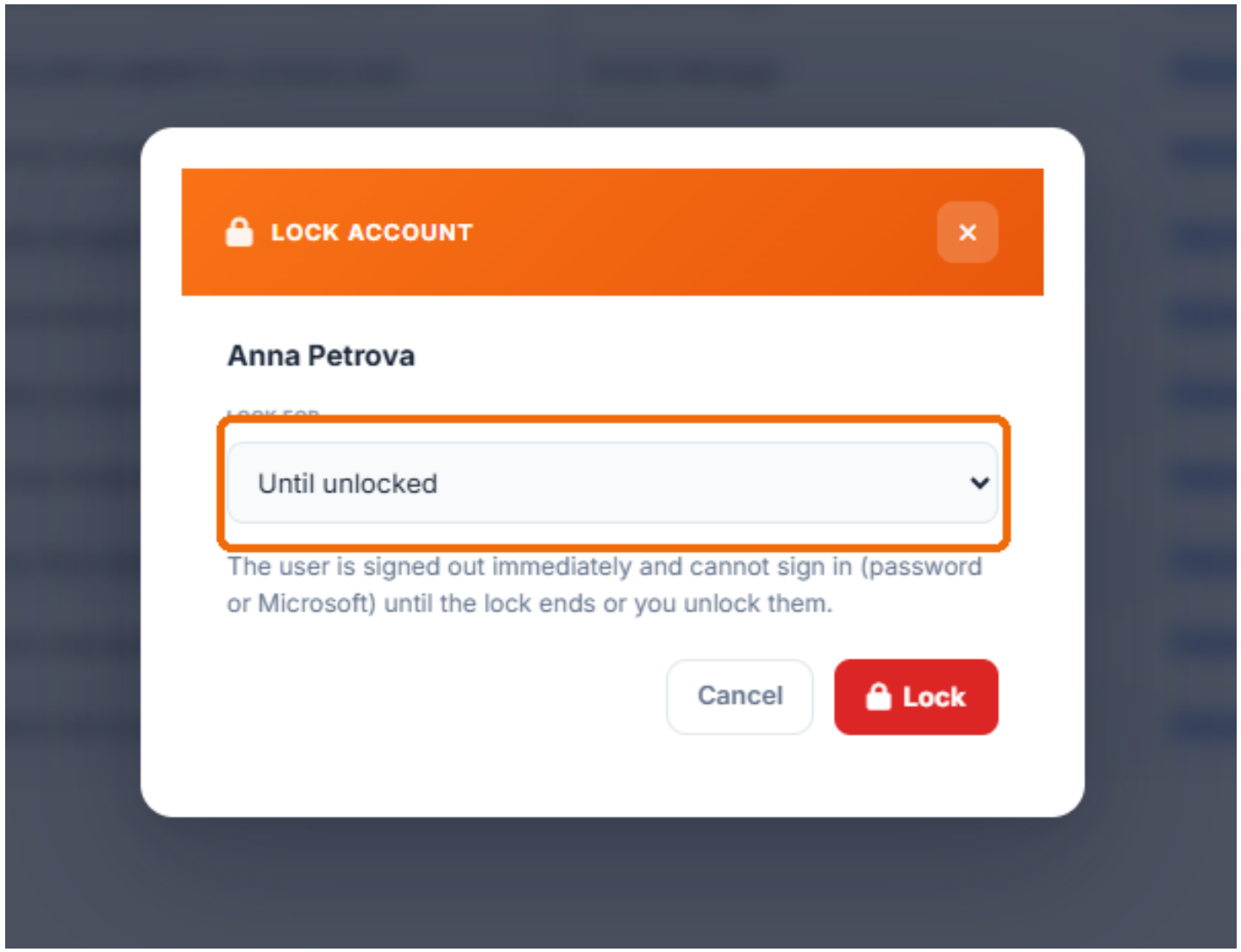
Reset authenticator



Reset (for enrolled people) removes the linked authenticator after a confirmation. The person sets it up again with a new phone at their next sign-in. Use it when someone loses or replaces their phone.

OTP / 2-Step Login

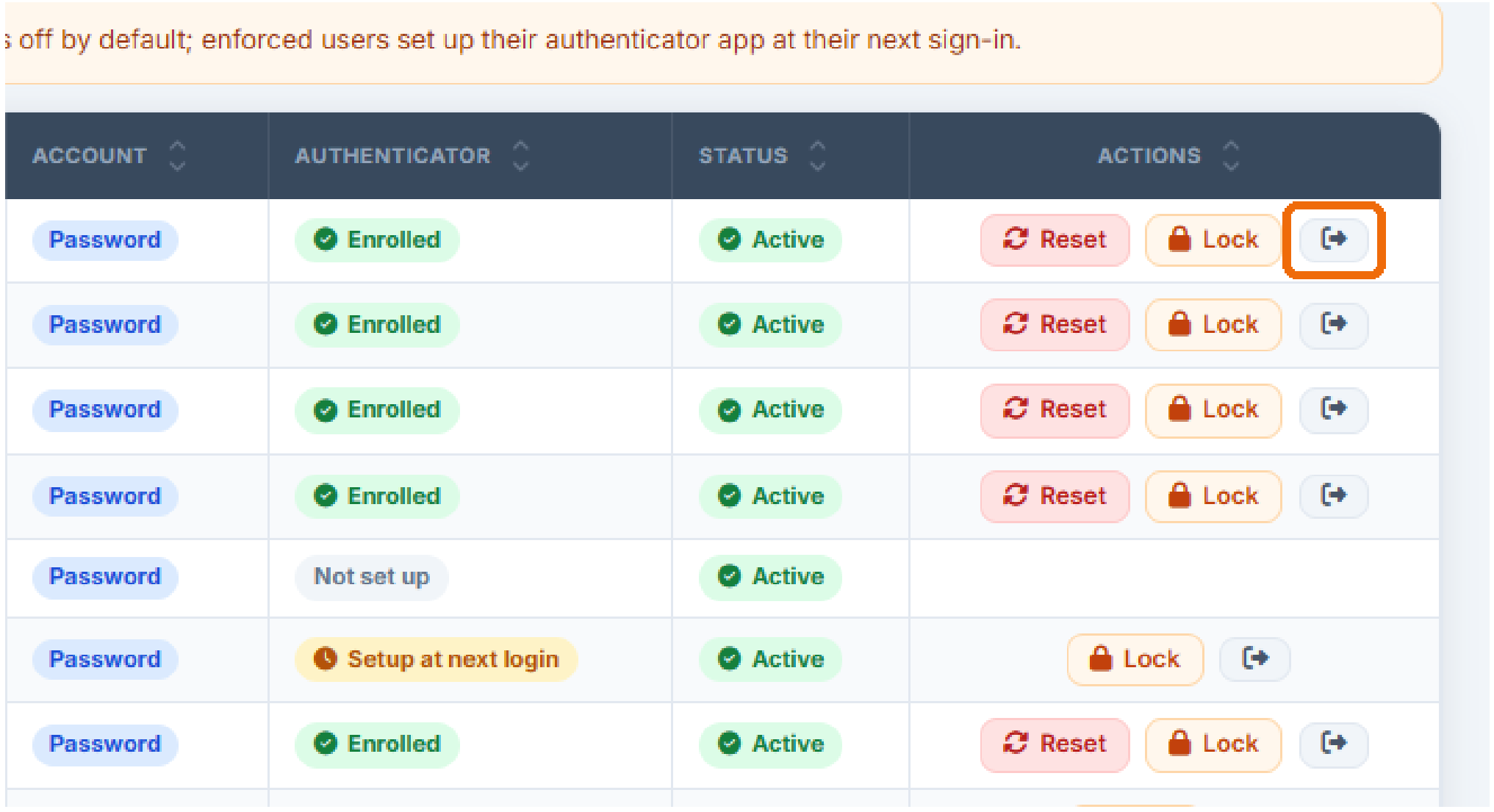
Lock an account



Lock opens the LOCK ACCOUNT window for that person. Choose how long: 1 hour, 1 day, 7 days, 30 days or Until unlocked, then press the red Lock button. The person is signed out immediately and cannot sign in (with password or Microsoft) until the lock ends or you unlock them; a locked row then shows an Unlock button. Cancel closes the window without changes.

OTP / 2-Step Login

Sign out everywhere



The arrow button signs the person out everywhere after a confirmation: all their open sessions on every computer and phone end at once, but the account stays active and they can sign in again. Use it when a device is lost or a shared computer was left signed in.