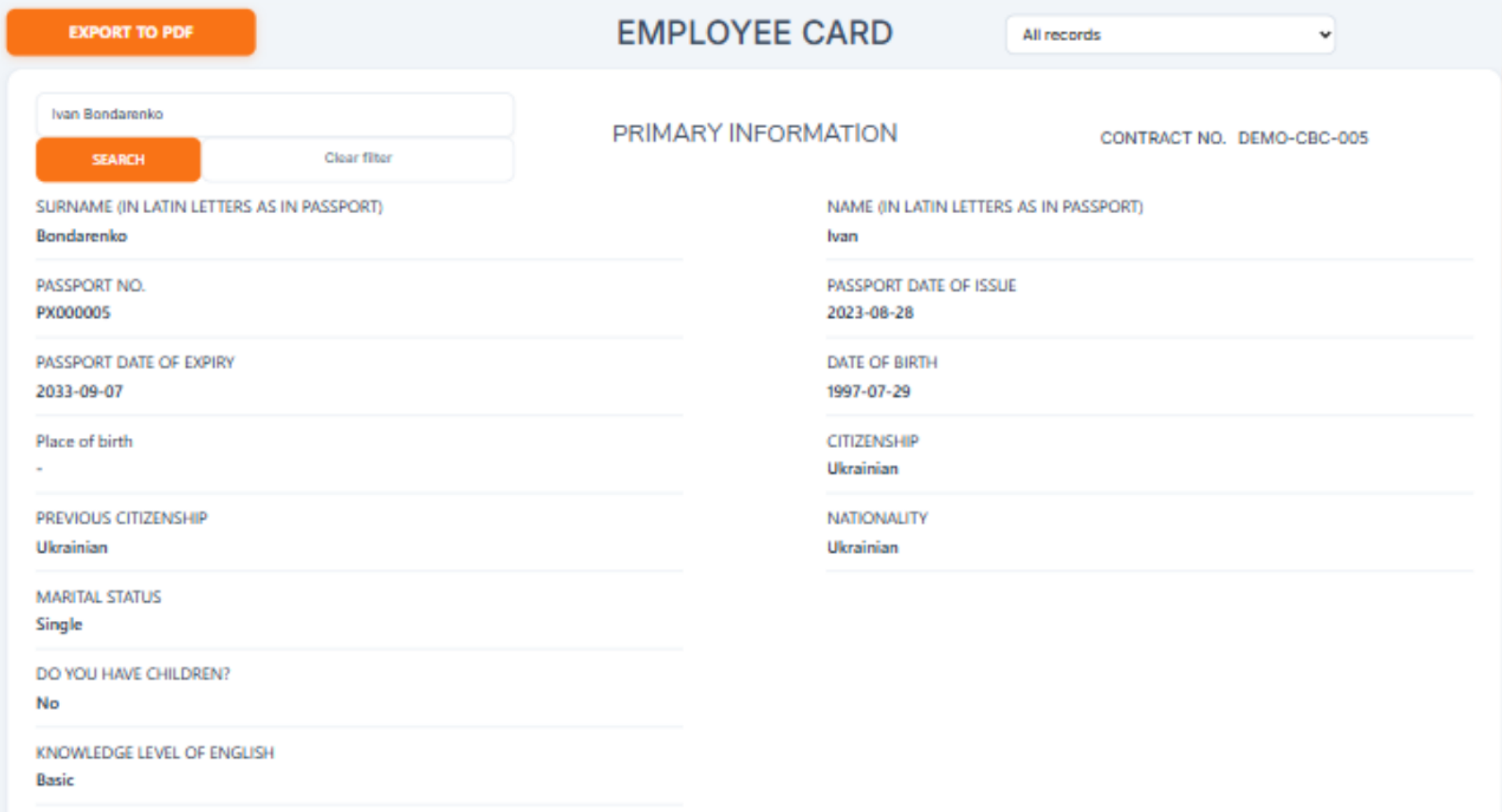
Employee Card

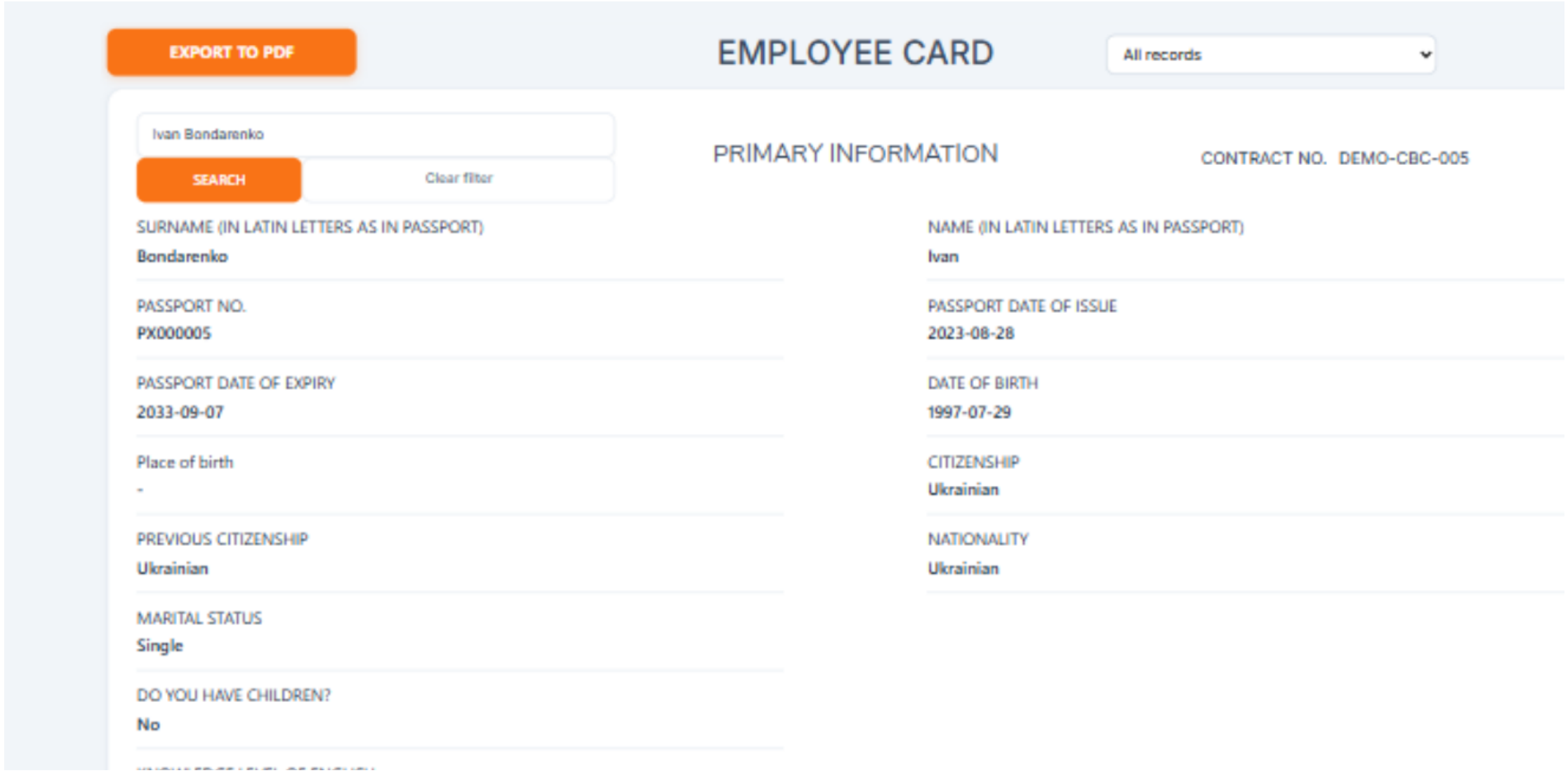
Choose the record source



Open Human Resources > Employee Card. All records includes people added manually, imported from Excel or collected through forms. A form selection limits the people available in search. The number beside a form is its record count.

Employee Card

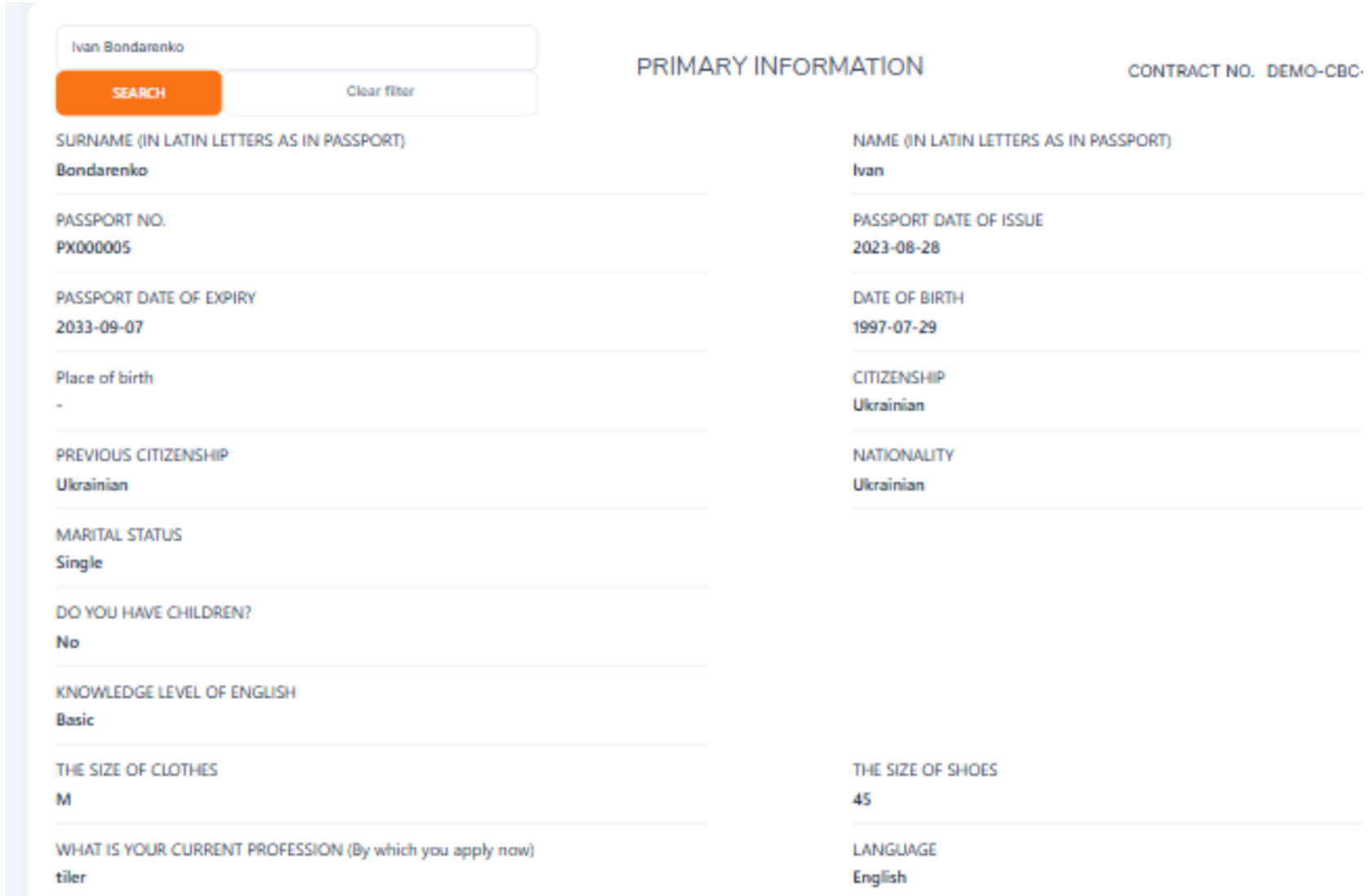
Select the search suggestion



Start typing the first name or surname. Select the actual autocomplete result, such as Ivan Bondarenko, before pressing Search. Typing text alone does not select a different employee. Check the name and contract number on the loaded card.

Employee Card

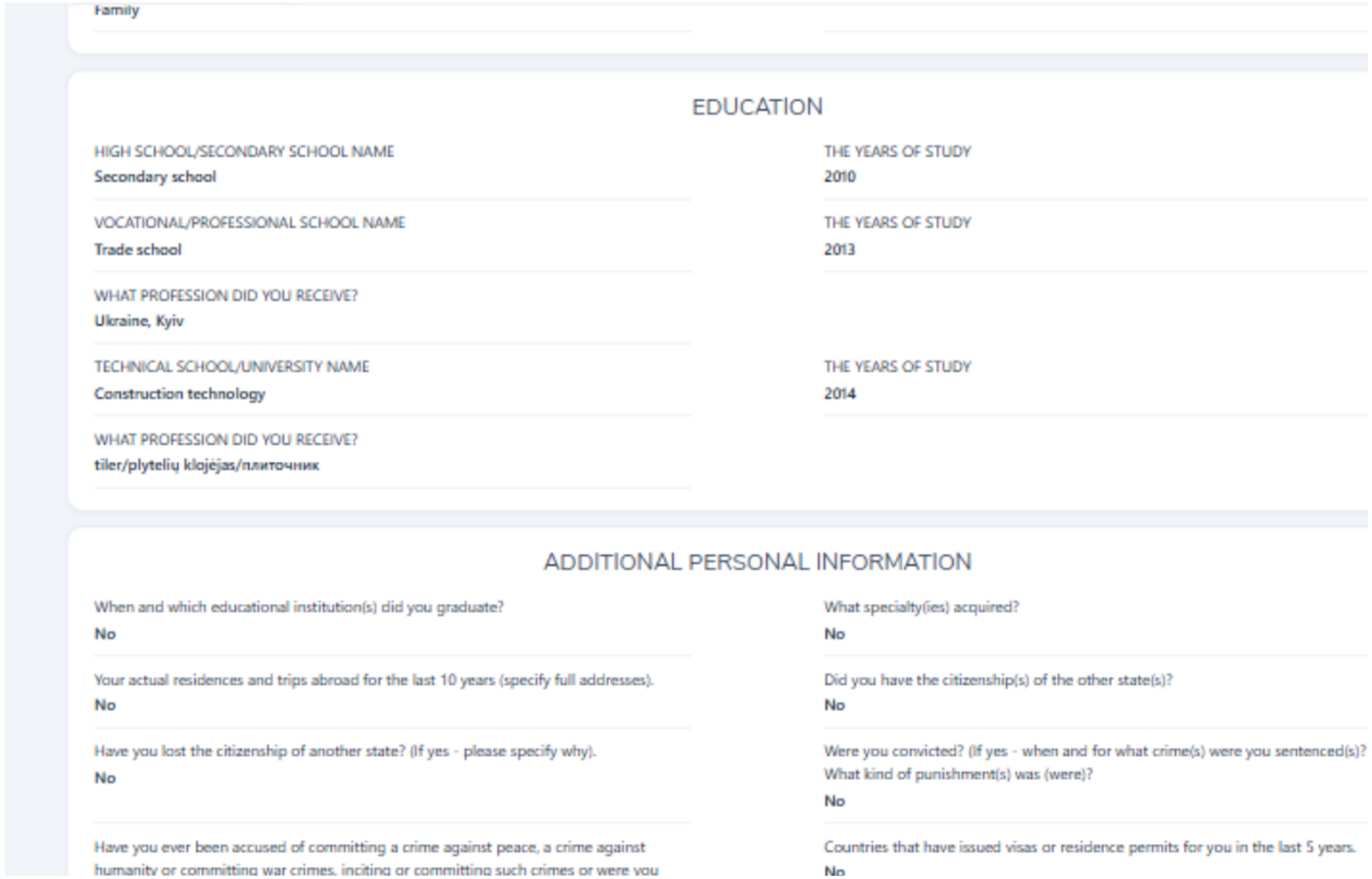
Read the main profile



The card presents the stored information for the selected person. Review primary information, contract number, passport dates, citizenship, profession, language and residence address. Empty fields and sections may be omitted, so cards can differ in length.

Employee Card

Review the remaining sections



Scroll down to review the available travel and visa information, contacts, next of kin, education, employment records and additional personal information. This is a reading view; change employee data through Employee Database.

Employee Card

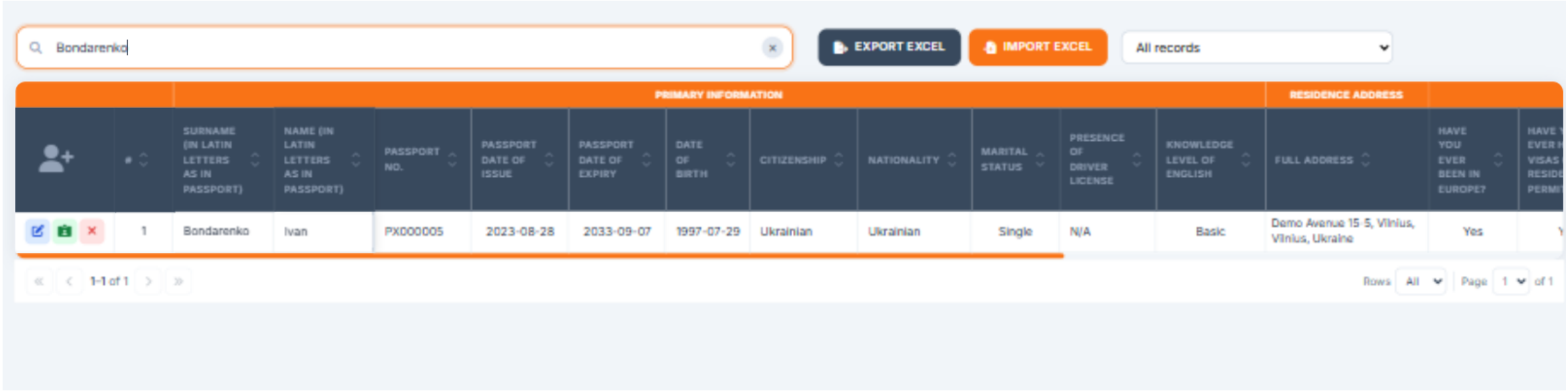
Export or reset



Return to the top and choose Export to PDF for a printable copy of the selected card. Check the selected employee before exporting. Use Clear filter to reset the lookup, or choose another autocomplete result and Search. The walkthrough shows the controls; it does not reproduce an exported employee document.

Employee Database

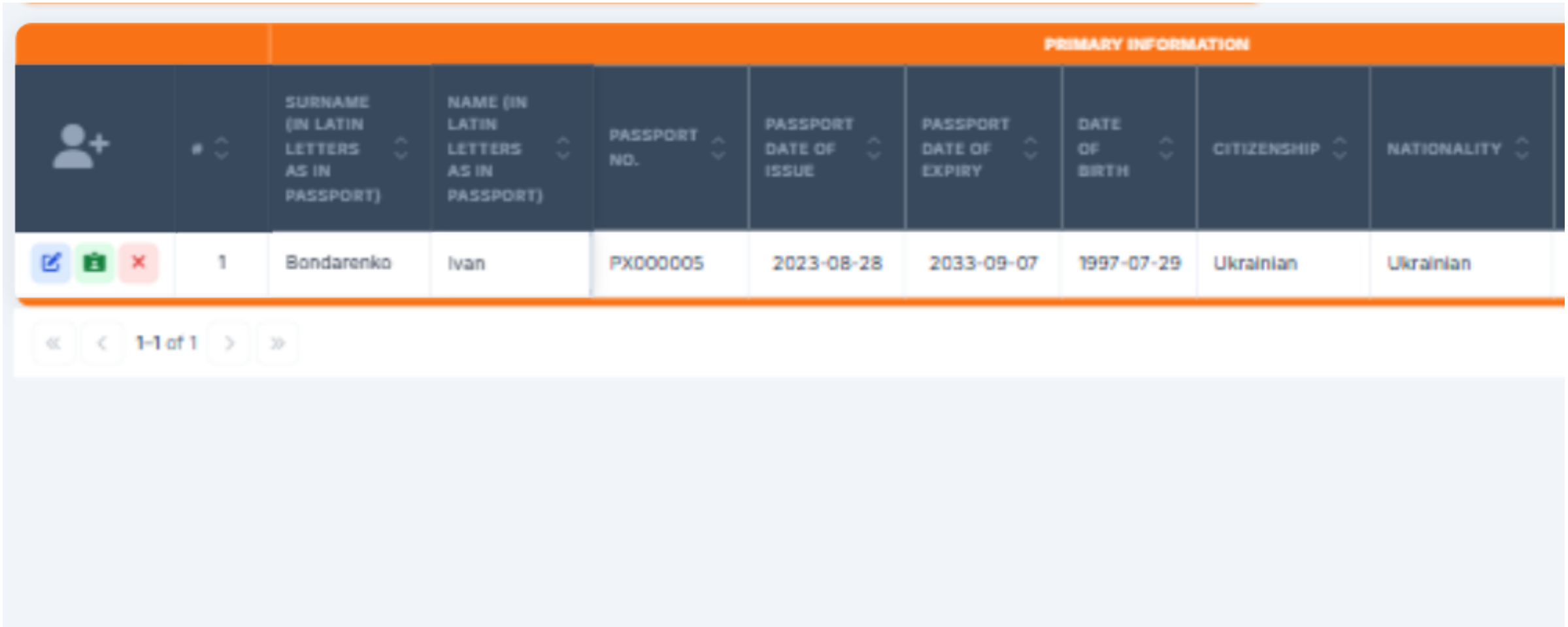
Find and browse records



Search by name or surname and wait for the table to update. Choose All records or a specific form. Click a column heading to sort. Use first/previous/next/last page, Rows and Page controls to browse. Scroll horizontally for columns beyond the screen; the left action and identity columns remain available.

Employee Database

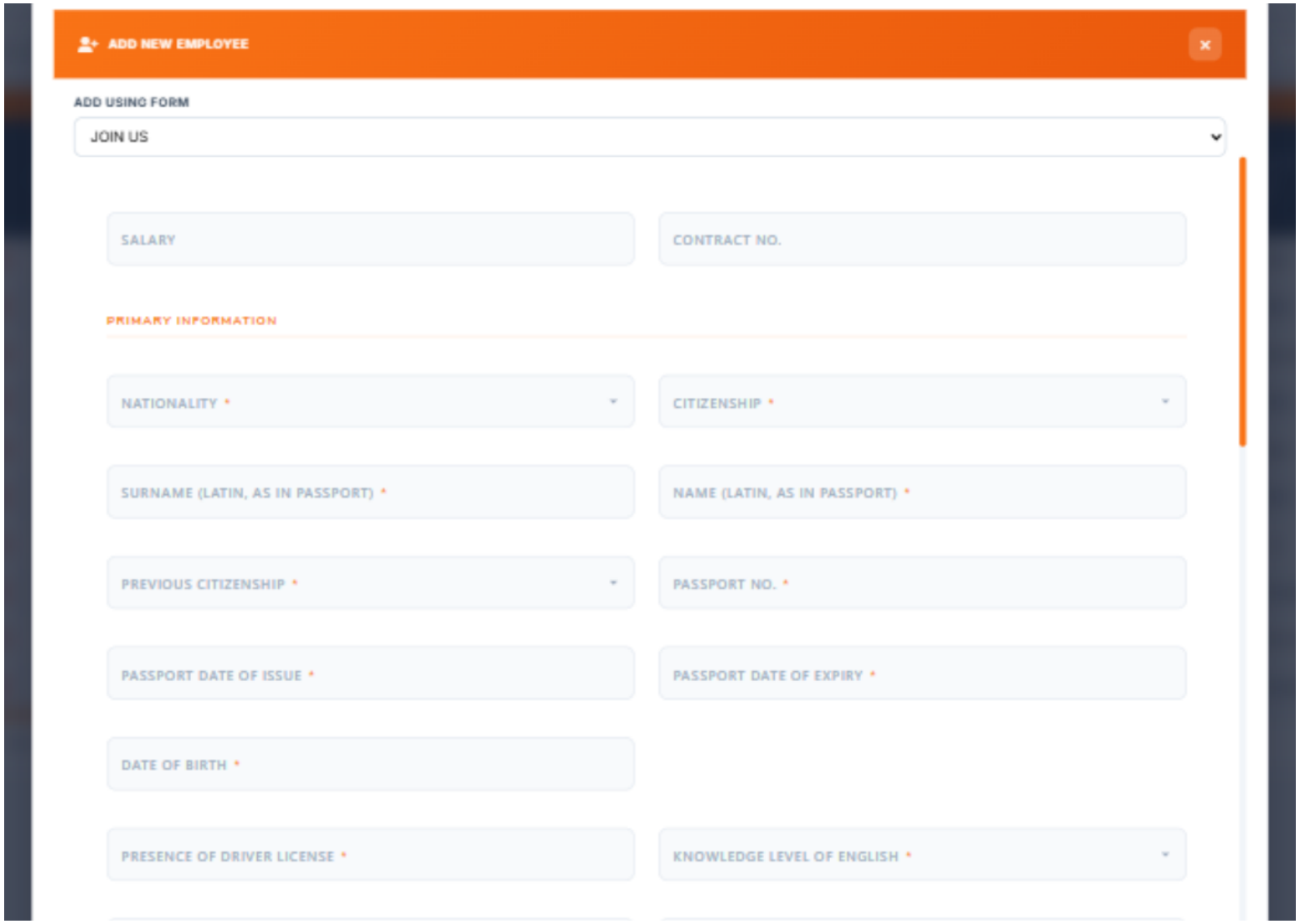
Use the row actions



Check the person in the row before using its action. The blue pencil opens the edit form and the green card opens read-only details. The red cross opens deletion; use it only for a record you intend to remove and review the confirmation. No record is deleted in this walkthrough.

Employee Database

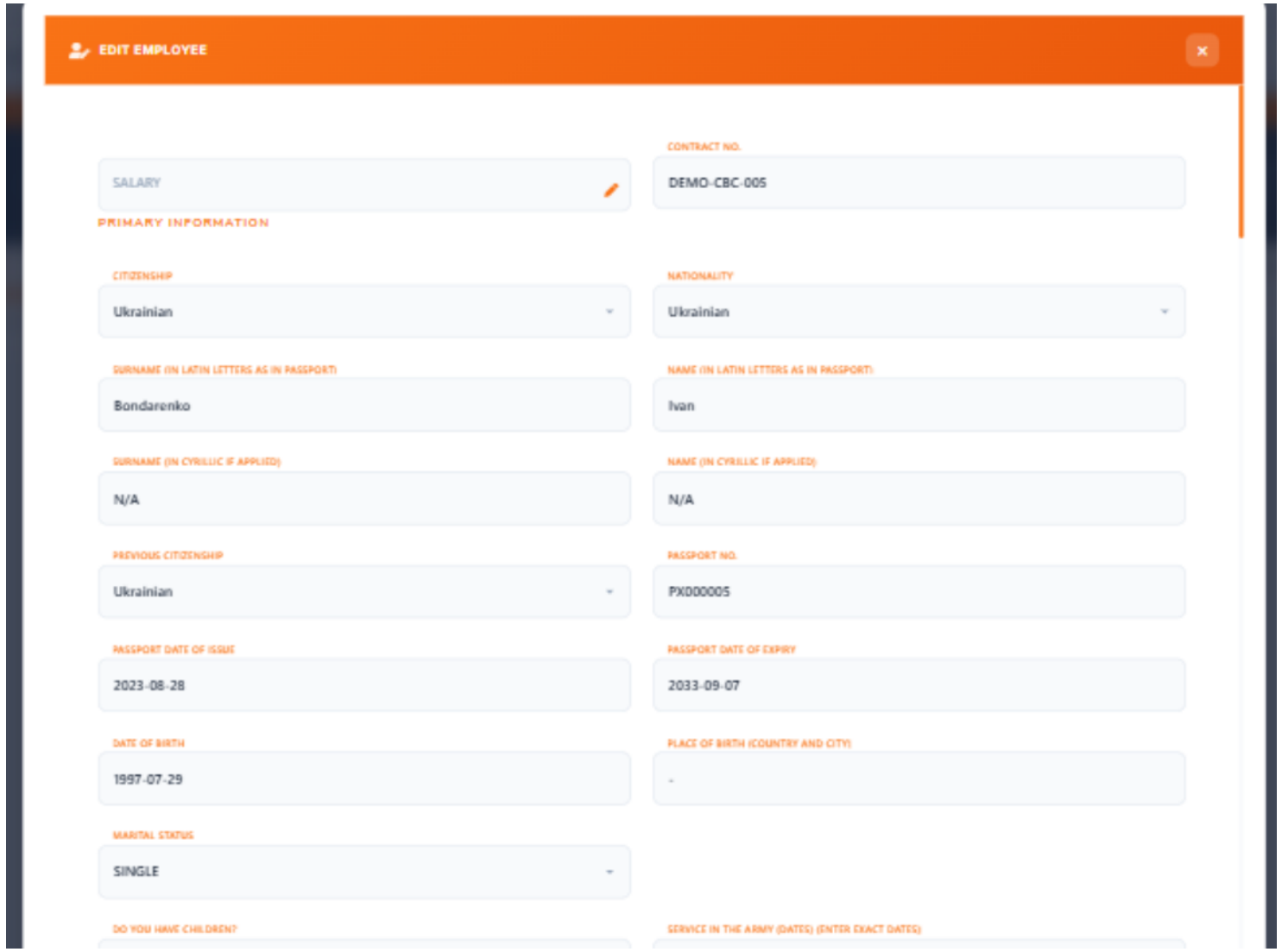
Add a person



The person-plus icon in the table header opens the entry form. Its layout can come from the default form configured in Forms Admin. Complete required fields, repeated sections and any declaration before Submit becomes available. Review validation messages before considering a record saved.

Employee Database

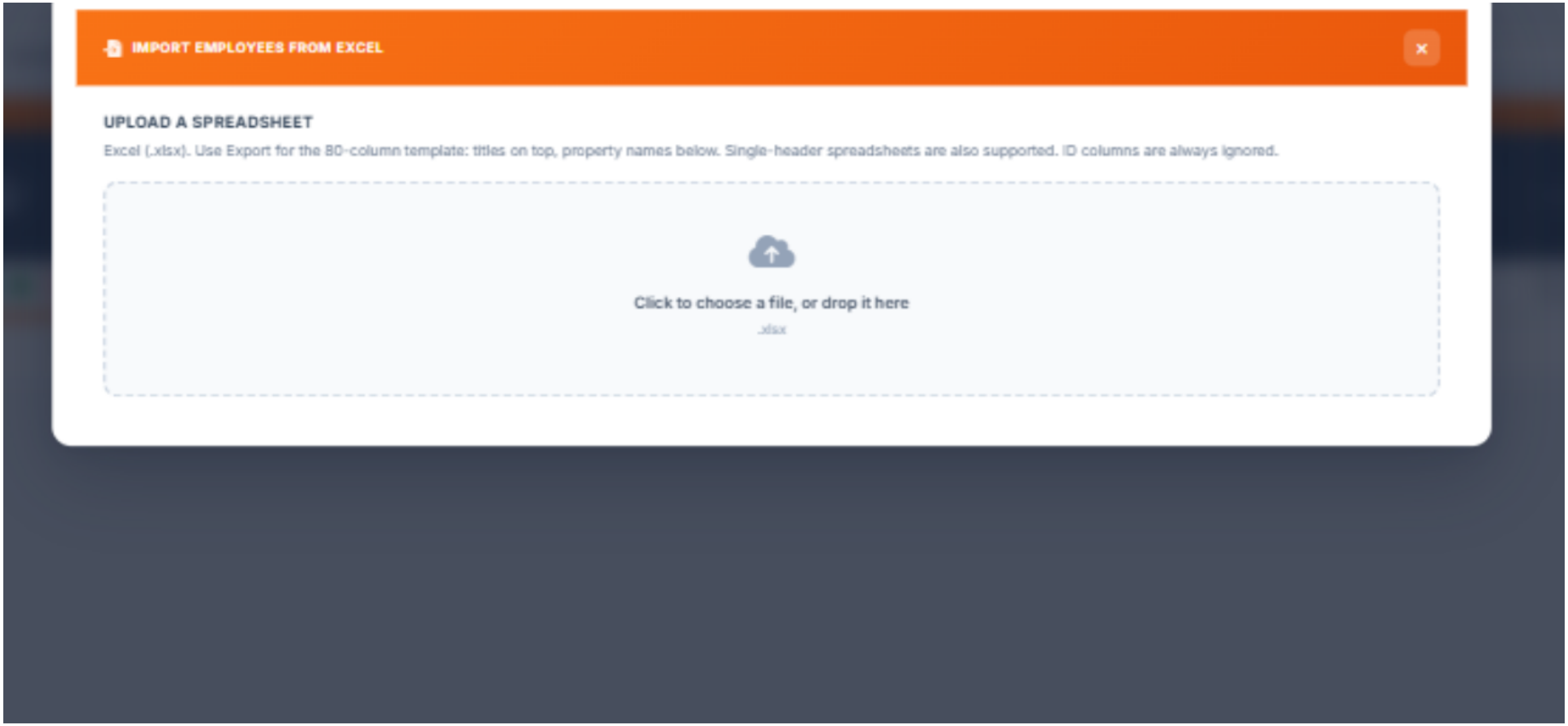
Edit the complete profile



The editor includes primary information, residence address, travel and visa/residence-permit records, contacts, next of kin, education, current and previous employment, and additional personal information. Plus/minus controls manage repeated entries where available. Scroll inside the dialog; review required fields and the declaration at the bottom before submitting. Close the dialog to leave the record unchanged.

Employee Database

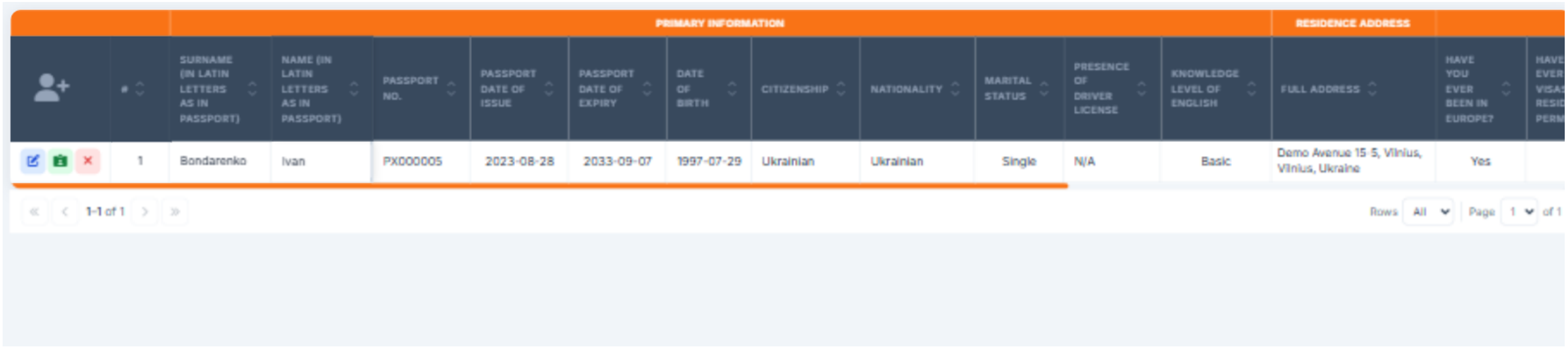
Import or export Excel



Export Excel downloads a workbook; review which records are present before using it for reporting or bulk editing. Import Excel accepts the exported template with field metadata and also single-header spreadsheets. ID columns are ignored. Choose a file, check sample values and destination fields, choose the match key, and set Update existing, Create new and Overwrite with blanks deliberately. Then Import and review created/updated/skipped counts and notes. This guide illustrates preparation, not a completed import.

Employee Database

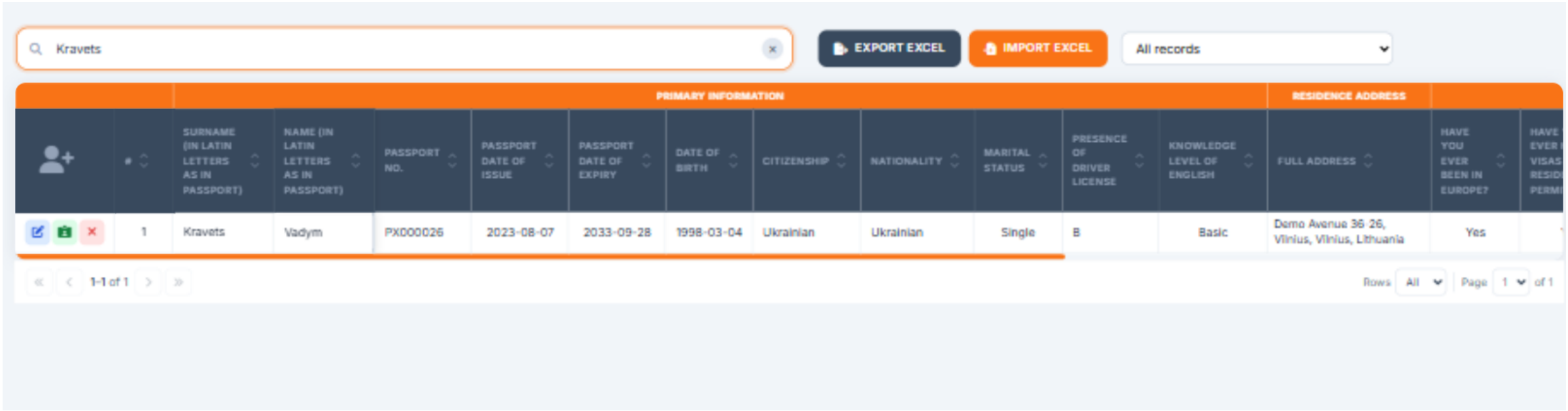
Control the table layout



Use Forms Admin > Table layout to select the columns, order, extra sticky columns and orange header groups for EmployeeDB/CandidateDB. The selected table-layout form controls presentation; the source selector controls which records are shown. They are separate settings.

Candidate Database

Find an applicant



Candidate Database is the applicant list. Search by name or surname and wait for results. All records includes all sources; choosing JOIN US or another form limits the list to that source. This capture uses the fictional candidate Vadym Kravets.

Candidate Database

Browse the wide table

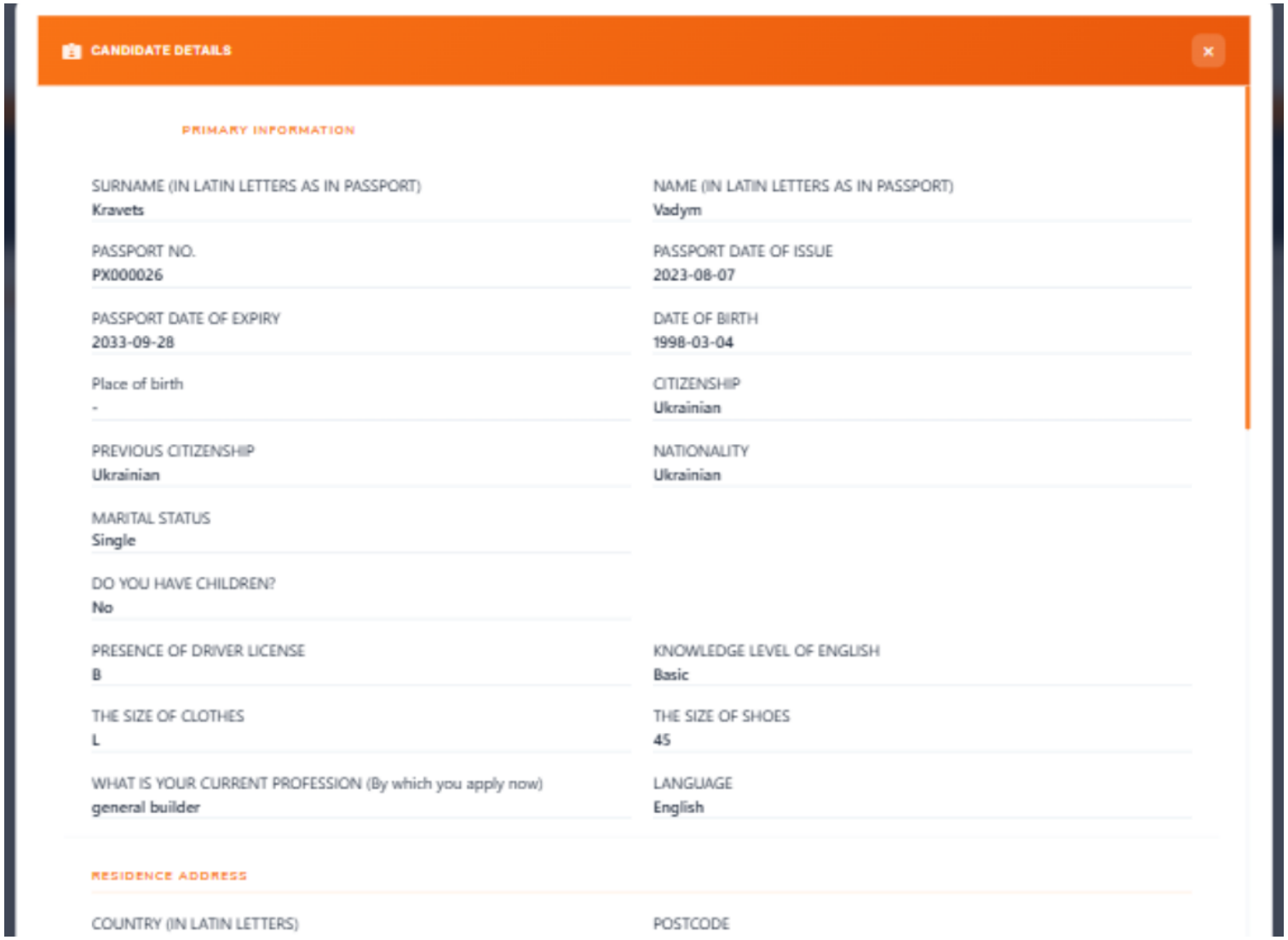
		PRIMARY INFORMATION											RESIDENCE ADDRESS		
	#	SURNAME (IN LATIN LETTERS AS IN PASSPORT)	NAME (IN LATIN LETTERS AS IN PASSPORT)	PASSPORT NO.	PASSPORT DATE OF ISSUE	PASSPORT DATE OF EXPIRY	DATE OF BIRTH	CITIZENSHIP	NATIONALITY	MARITAL STATUS	PRESENCE OF DRIVER LICENSE	KNOWLEDGE LEVEL OF ENGLISH	FULL ADDRESS	HAVE YOU EVER BEEN IN EUROPE?	HAVE EVER VISA RESI PERM
	1	Kravets	Vadym	PX000026	2023-08-07	2033-09-28	1998-03-04	Ukrainian	Ukrainian	Single	B	Basic	Demo Avenue 36 26, Vilnius, Vilnius, Lithuania	Yes	

1-1 of 1 Rows All Page 1 of 1

Click column headings to sort, use the horizontal scrollbar for additional fields, and use the page navigation controls or Rows selector for larger lists. Forms Admin sets the displayed columns, sticky columns and header groups.

Candidate Database

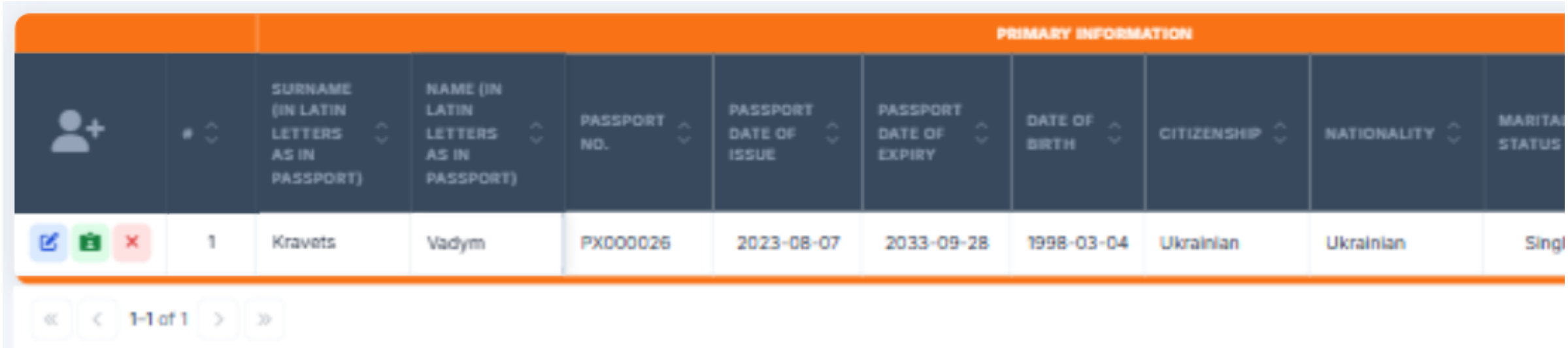
Review before editing



Open the green card beside the correct candidate to review their information. The card is separate from the blue edit action. Scroll within the details view to inspect the remaining sections, then close it to return to the filtered results.

Candidate Database

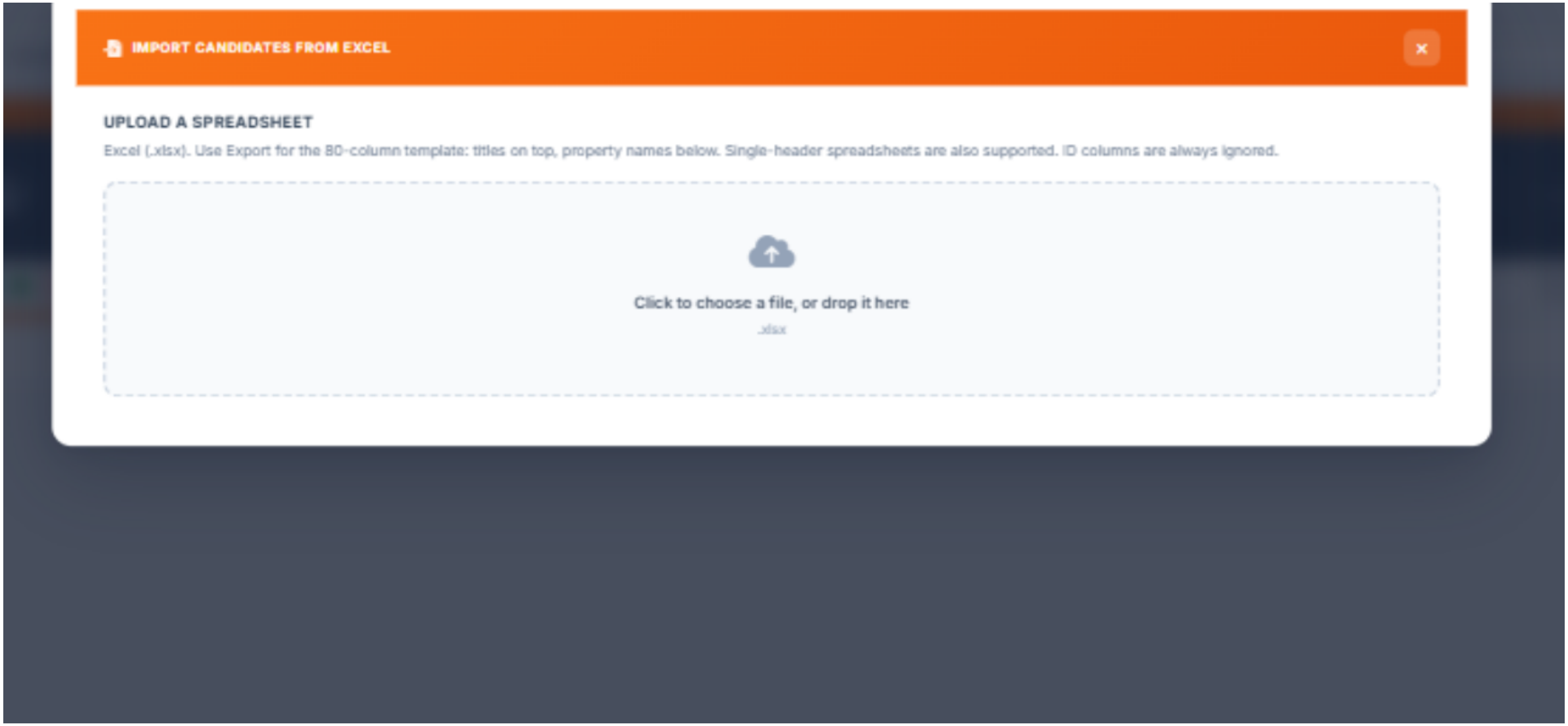
Add, edit or remove



The header person-plus opens the intake form. The blue pencil edits an existing applicant, including mapped and repeated data. Complete required values and review validation before submitting. The red cross is a deletion action: confirm the record and the consequence first. The walkthrough does not delete or change an applicant.

Candidate Database

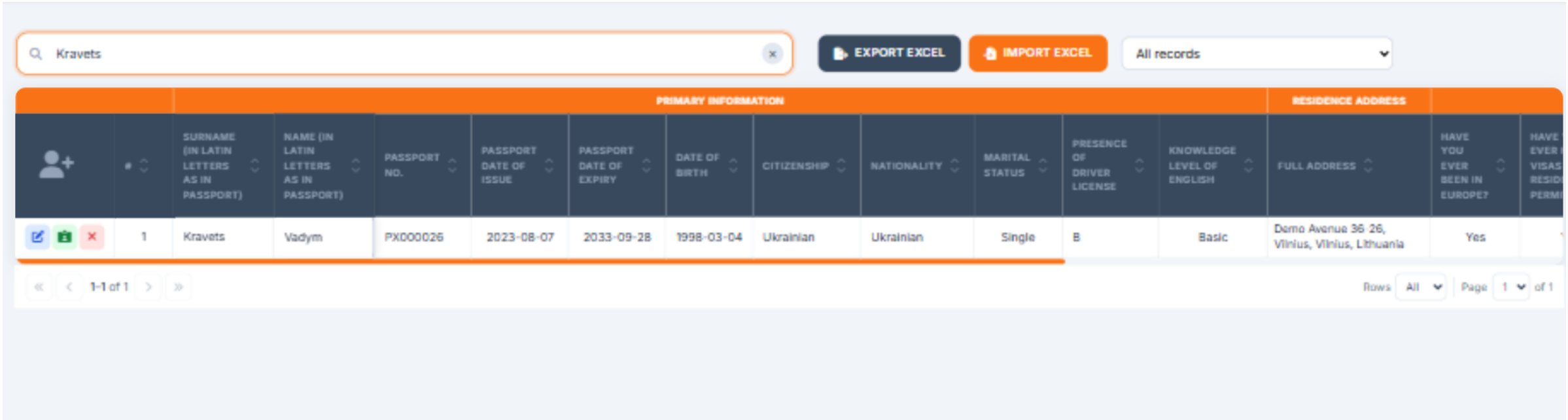
Move data through Excel



Export Excel provides data for offline work. To import, select an .xlsx file, verify column mappings and sample values, choose the matching key and decide whether to create new or update existing records. Keep Overwrite with blanks off unless blank cells should erase existing values. Review the completion counts and errors after a real import.

Candidate Database

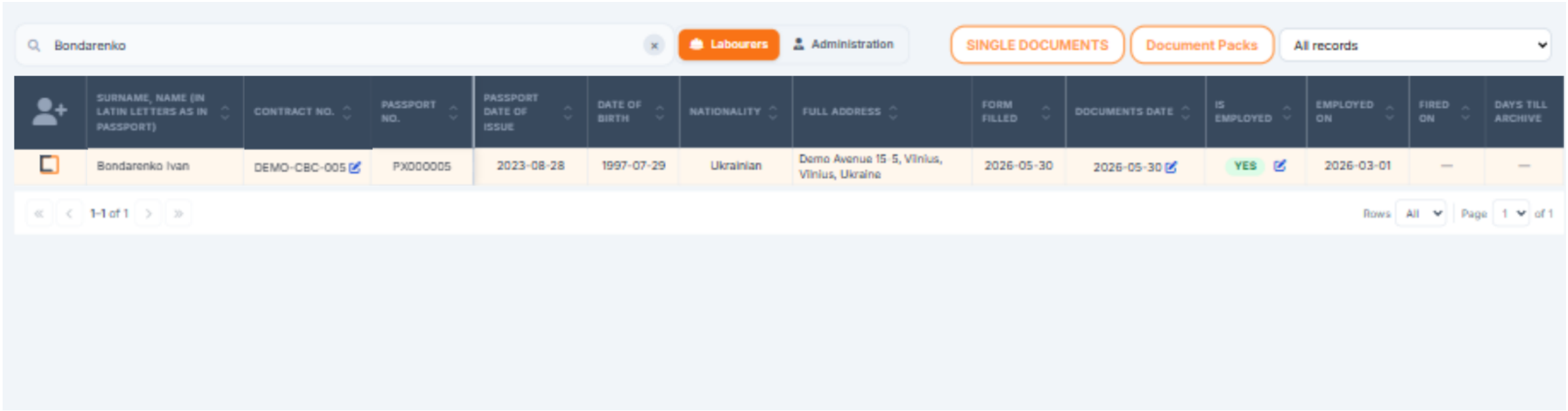
Continue to onboarding



When the applicant is ready, open Onboarding / Offboarding, find and select the person, set the appropriate contract and document dates, generate the required documents and manage employment there. Creating or editing a candidate record is separate from completing onboarding.

Onboarding / Offboarding

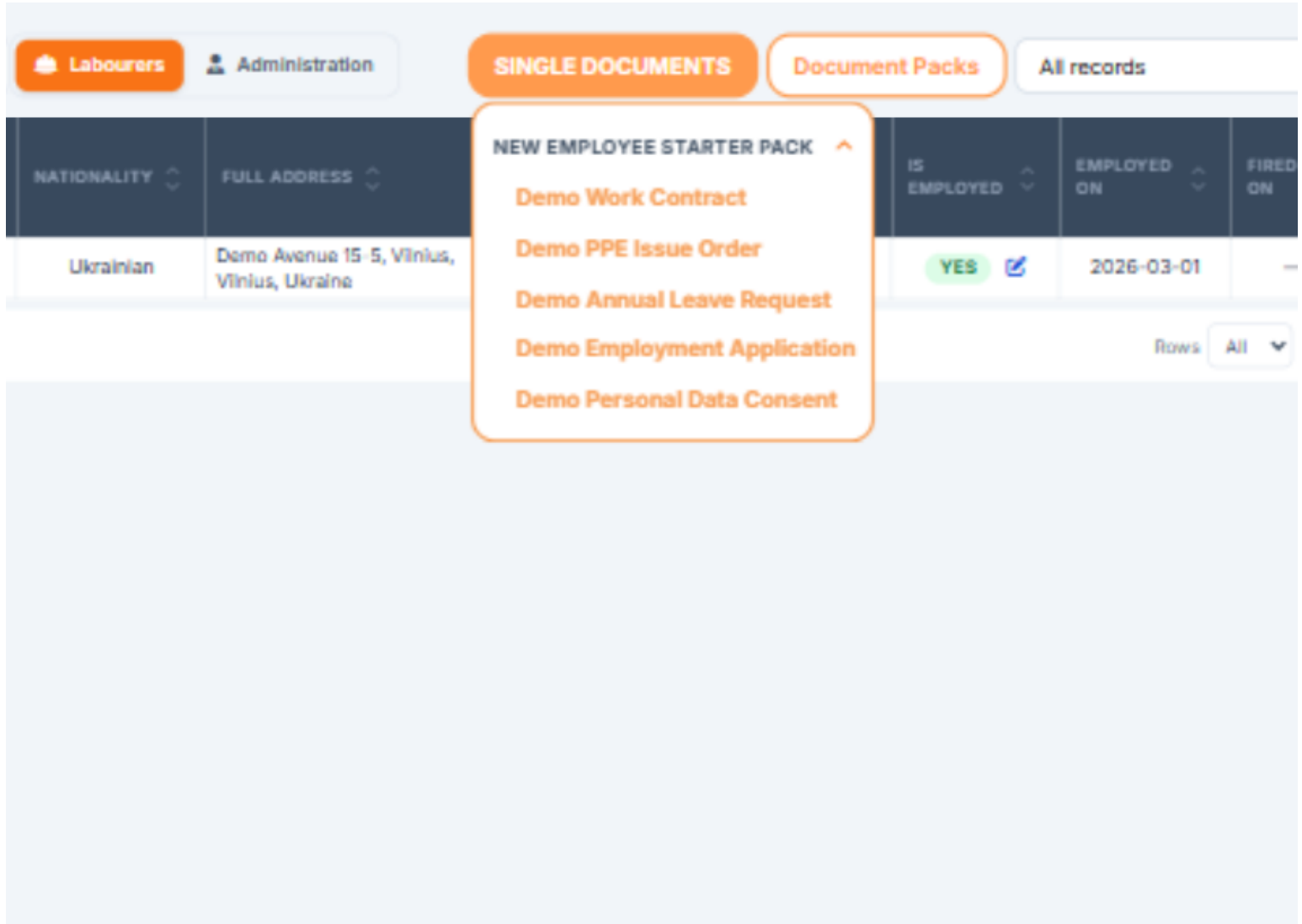
Choose people and source



Labourers contains workers and candidates. Search to narrow the table, use the form-source selector where available, and select the checkbox beside each person needed for document generation. Sorting, horizontal scrolling and pagination help with large lists. The header person-plus opens an entry form.

Onboarding / Offboarding

Generate documents or a pack



Single Documents lists the configured templates. Document Packs generates a bundle for each selected person. Where document categories are configured, a combined Documents tree groups categories, packs and individual documents; uncategorized items appear under Ungrouped. Documents Admin supplies these definitions. Check the people and document choice before generation.

Onboarding / Offboarding

Set contract and document dates

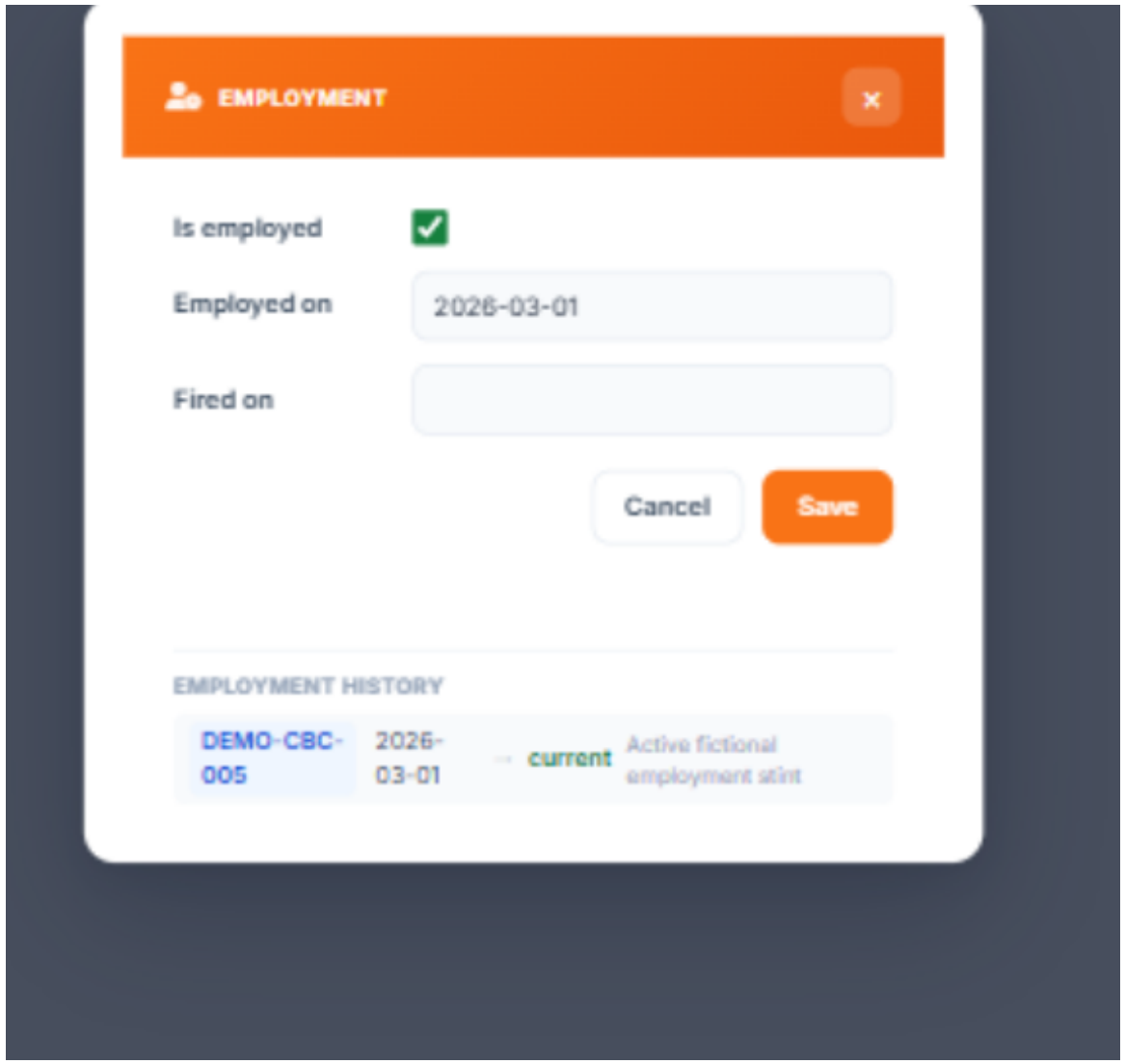
SURNAME, NAME (IN LATIN LETTERS AS IN PASSPORT)	CONTRACT NO.	PASSPORT NO.	PASSPORT DATE OF ISSUE	DATE OF BIRTH	NATIONALITY	FULL ADDRESS	FORM FILLED	DOCUMENTS DATE	IS EMPLOYED	EMPLOYED ON	FIRED ON	DAYS TILL ARCHIVE
Bondarenko Ivan	DEMO-CBC-005	PXD00005	2023-08-28	1997-07-29	Ukrainian	Demo Avenue 15-5, Vilnius, Vilnius, Ukraine	2026-05-30	2026-05-30	YES	2026-03-01	—	—

1-1 of 1 Rows All Page 1 of 1

Contract No. identifies the employment contract; Documents Date supplies the date used for generated documents. Use the corresponding pencil to edit the value and save after checking it. The form-filled date is separate. The layout can include a Salary panel when supported by the default form; it is not displayed in this captured table.

Onboarding / Offboarding

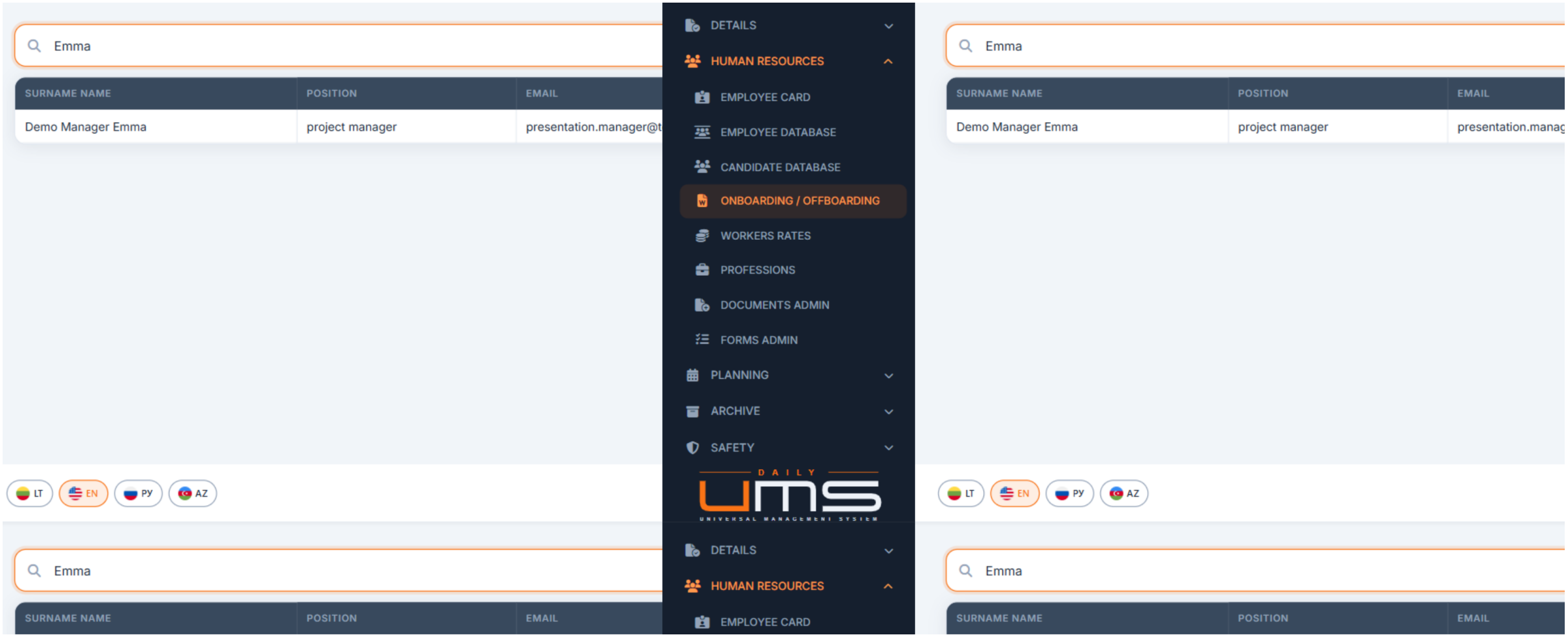
Manage employment and history



The employment dialog contains Is employed, Employed on, Fired on and employment history. Setting employed to Yes includes the person in planning and may fill the start date. Releasing a person sets an end date, archives the employment and related tests, and changes the login role back to Candidate. Review the dates before Save. No employment status is changed in this demonstration.

Onboarding / Offboarding

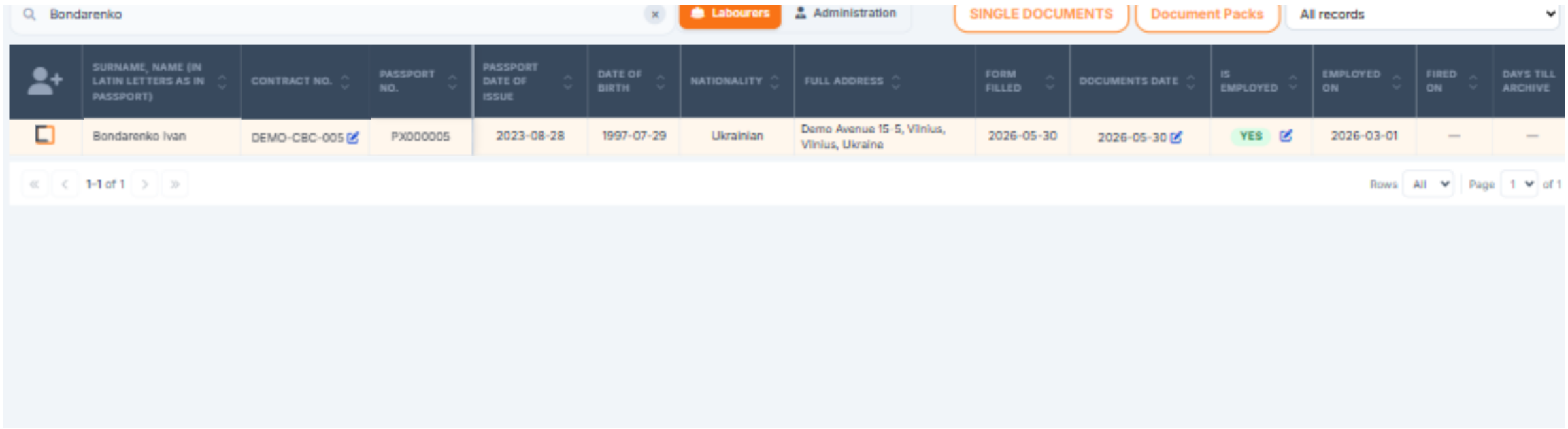
Manage office staff



Administration lists office staff rather than labourers. Review their position, email and role, then use the employment controls where available. Offboarding office staff removes their access to the organization and archives their tests. Clear a labourer-specific search when switching tabs.

Onboarding / Offboarding

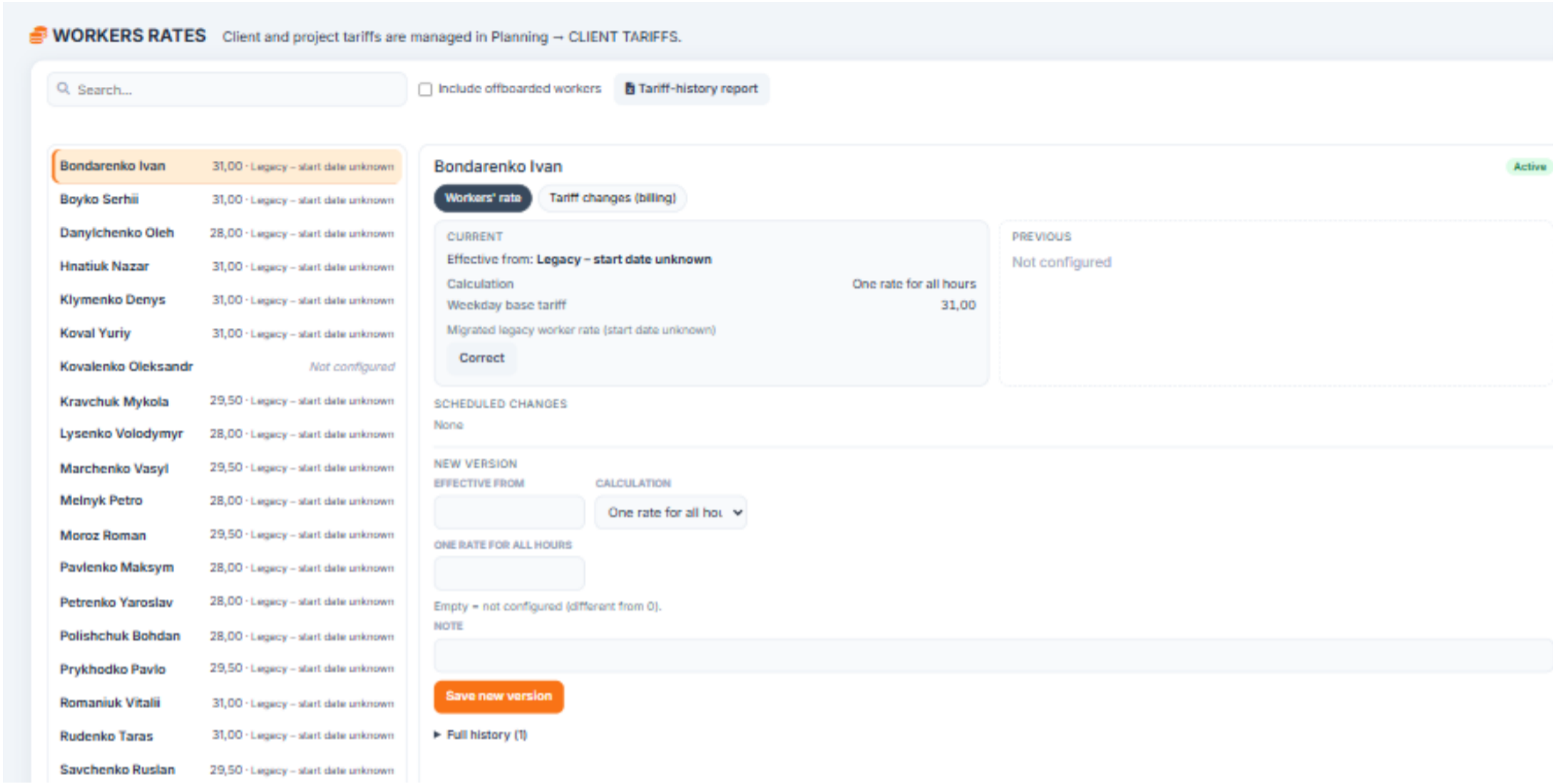
Understand salary and layout dependencies



When a Salary editor is available, enter amount, currency, pay basis, gross/net and validity dates. New salary versions retain history. Amount-in-words fields support document tags; additional languages are configured in Documents Admin. Forms Admin has separate Default intake and Table layout settings. Contract, employment and date controls are functional columns; other columns depend on the layout.

Workers Rates

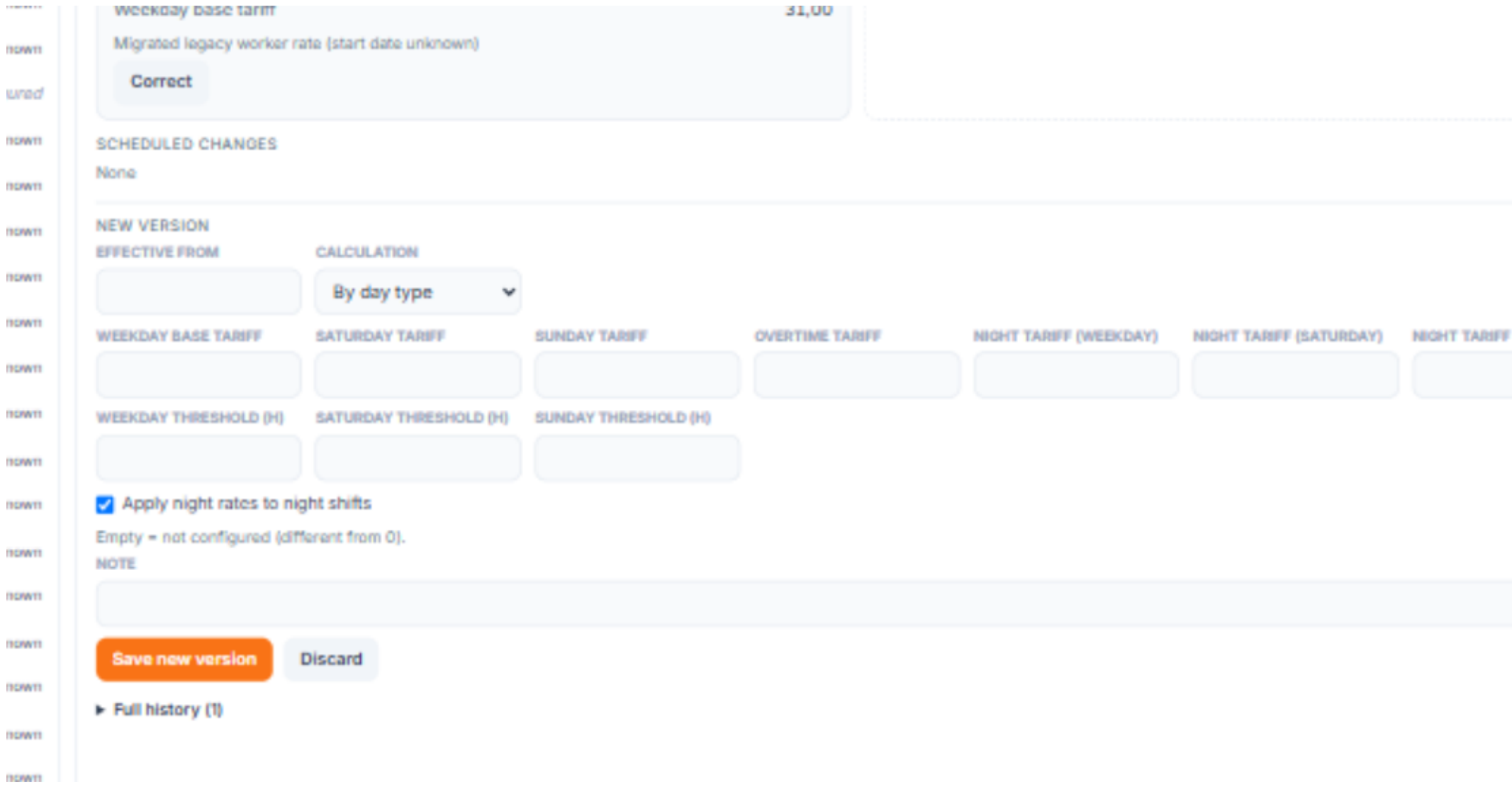
Find a worker and read the current rate



Select a worker in the left list. Not configured means no tariff has been set. Include offboarded workers adds archived people for read-only history. The detail area shows Current, Previous, Scheduled changes and Full history. Legacy - start date unknown identifies imported rates whose original start date is unavailable.

Workers Rates

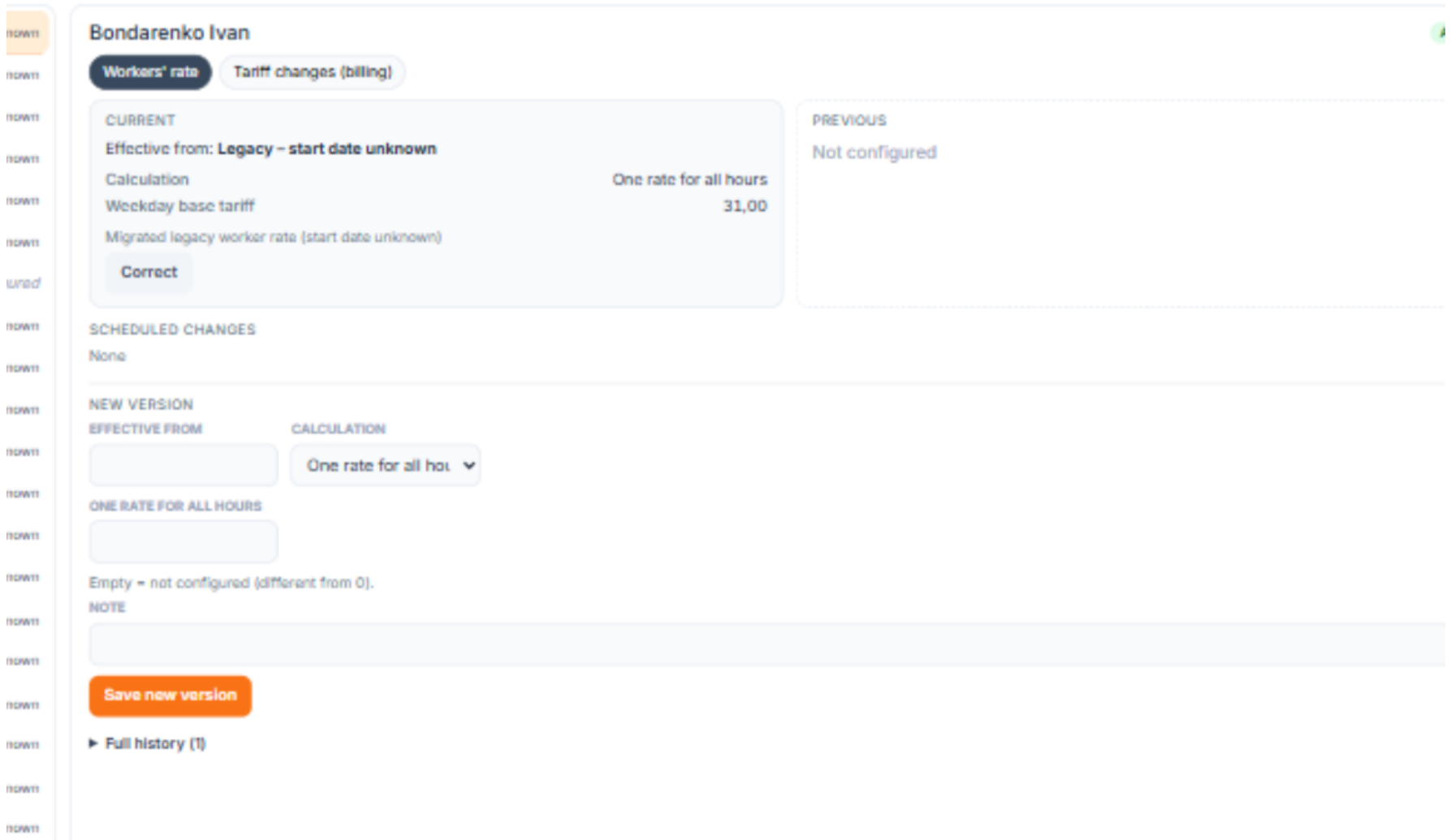
Choose the calculation method



Choose One rate for all hours or By day type. Day-type calculation exposes weekday, Saturday and Sunday rates, overtime, night rates for each day type, and separate daily thresholds. Apply night rates to night shifts uses planned night shifts. Empty is not the same as zero: missing configuration can produce Incomplete in Hours.

Workers Rates

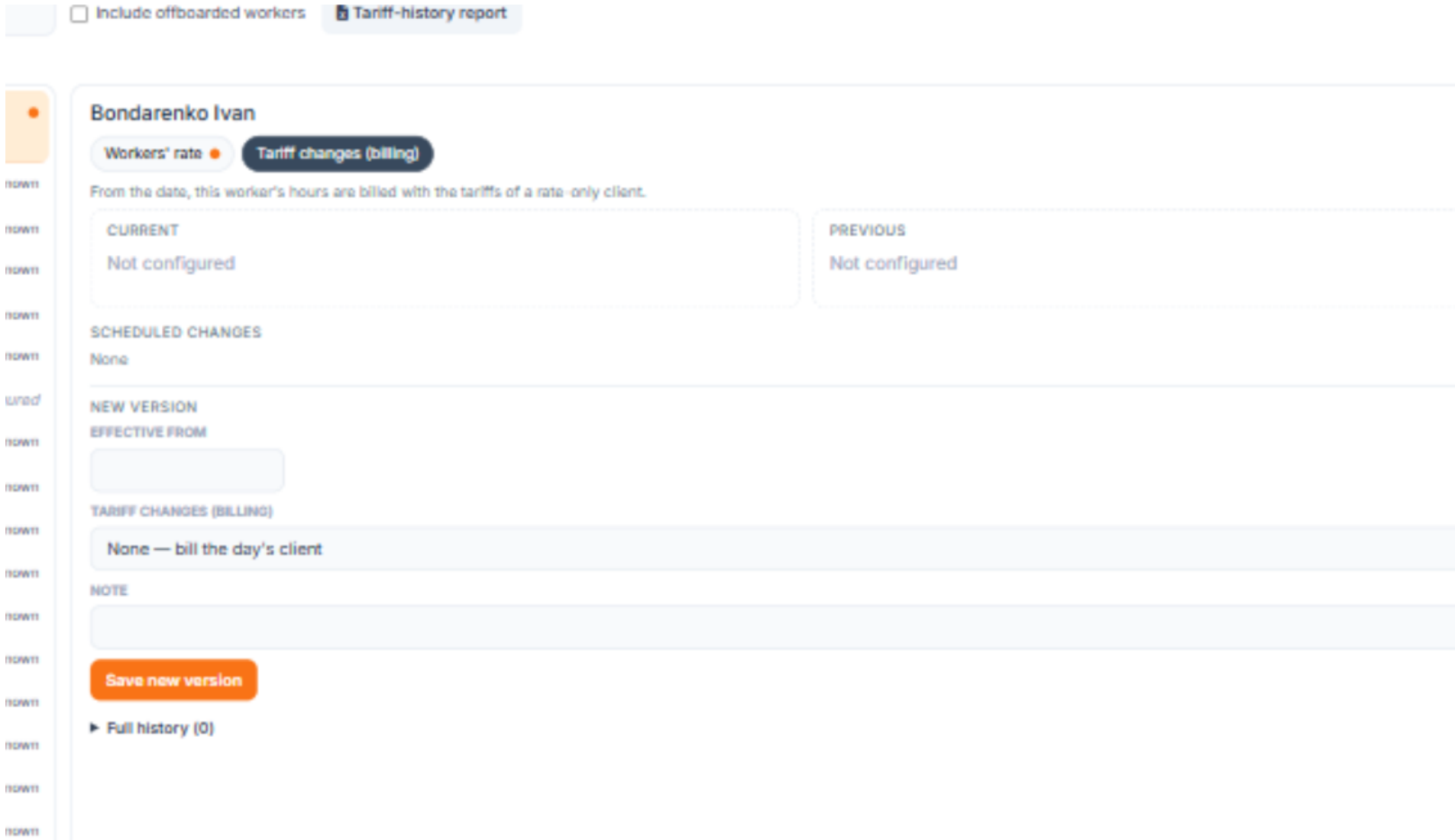
Save a dated version or correct a mistake



A new dated version closes the previous version automatically. A future effective date creates a scheduled change that can be cancelled before it starts. Correct records a correction while preserving the old values in history. Add a useful note, review the values and date, then save. Discard abandons unsaved edits. No pay rate is saved in this walkthrough.

Workers Rates

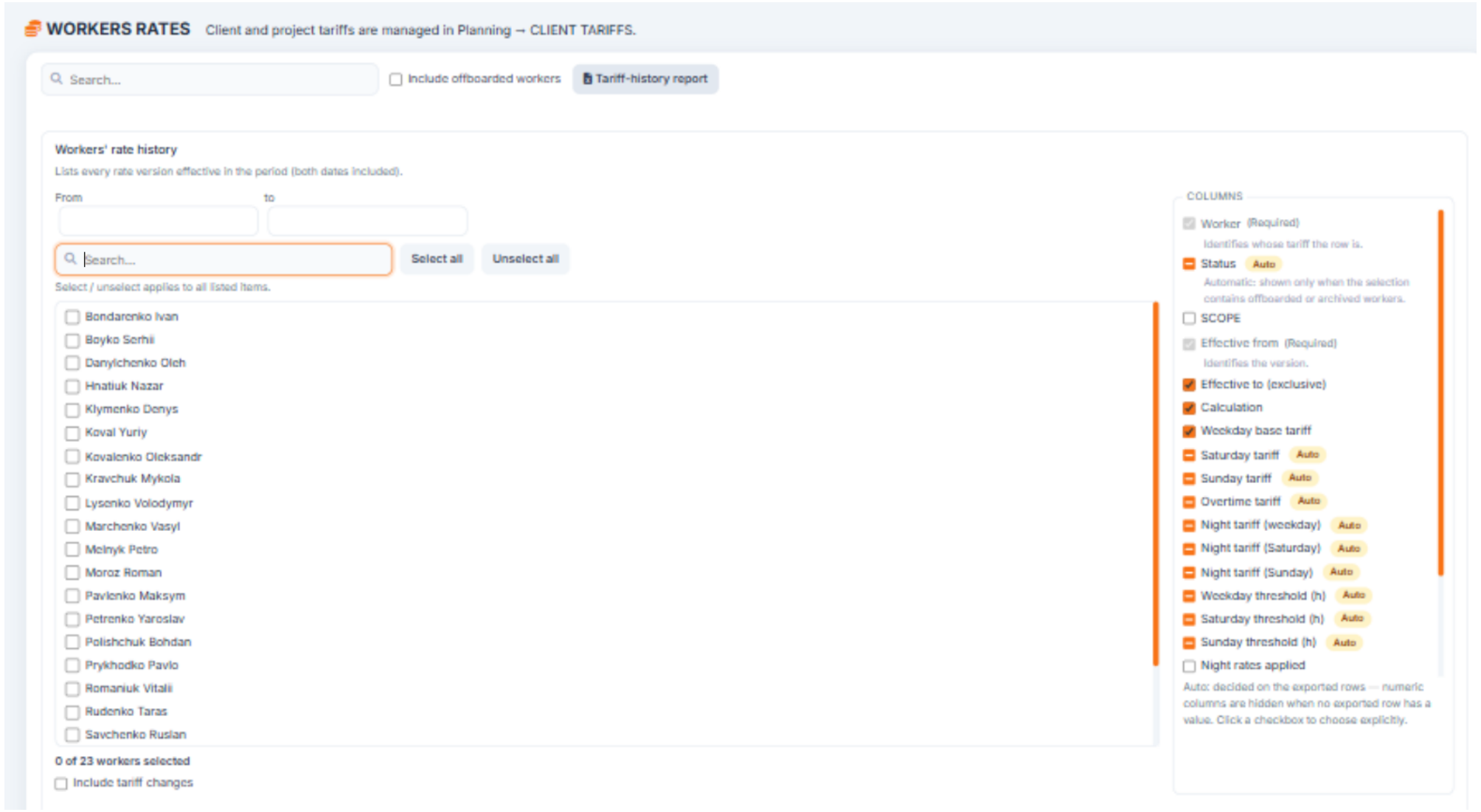
Configure a billing override



The Tariff changes (billing) tab controls how this worker’s hours are billed, separately from their pay. Choose a rate-only client defined under Planning > Client Rates, set an effective date and save a new version. None - bill the day’s client ends the override from the chosen date. This tenant currently offers only None.

Workers Rates

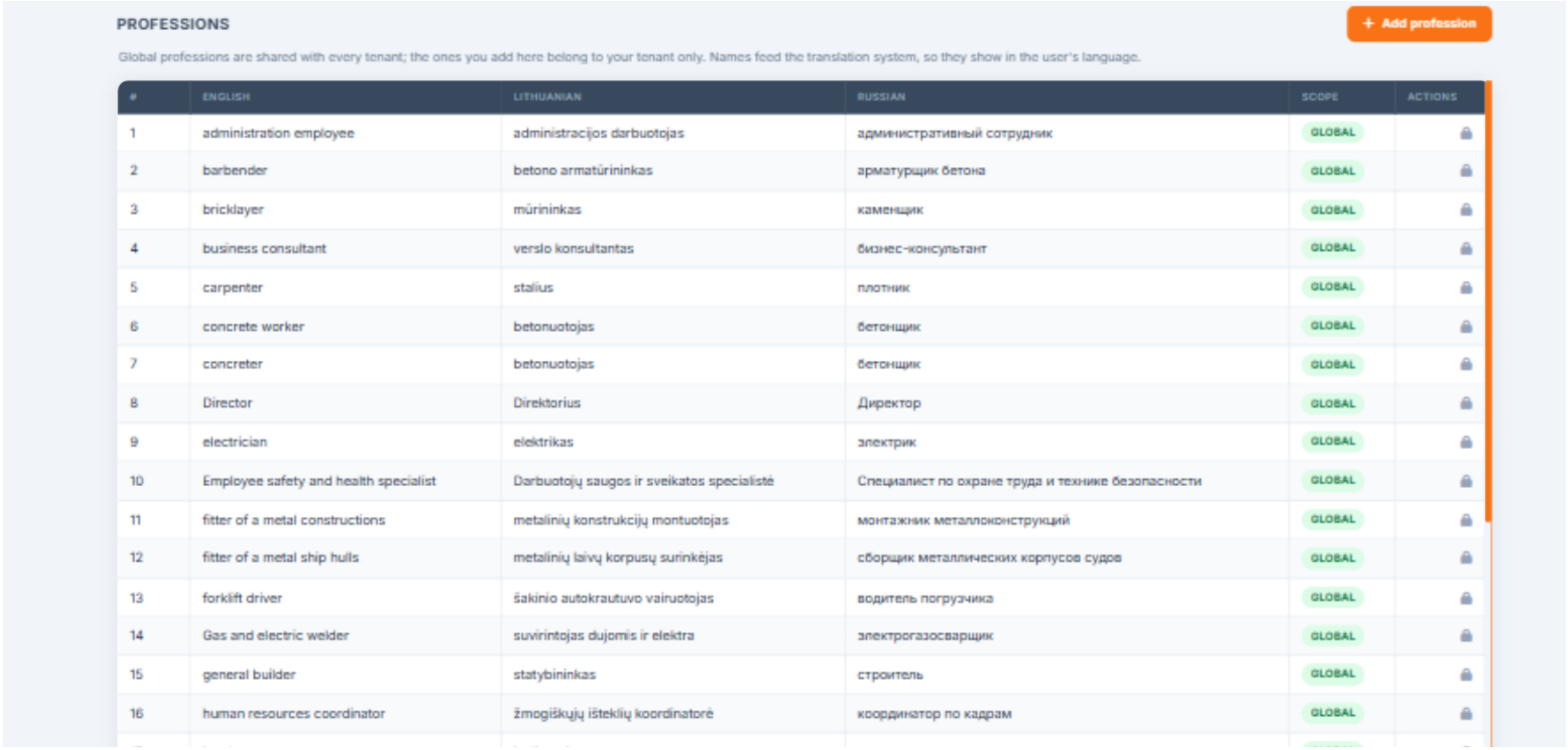
Build a history report



Tariff-history report includes every rate version effective in the inclusive From/To period. Search the worker list, select individuals or use Select all/Unselect all. Include tariff changes adds billing changes. Required columns stay on; Auto columns are included only when the exported rows need them. Select at least one worker to enable Download .xlsx. Back to tariffs returns to the editor.

Professions

Read the profession list

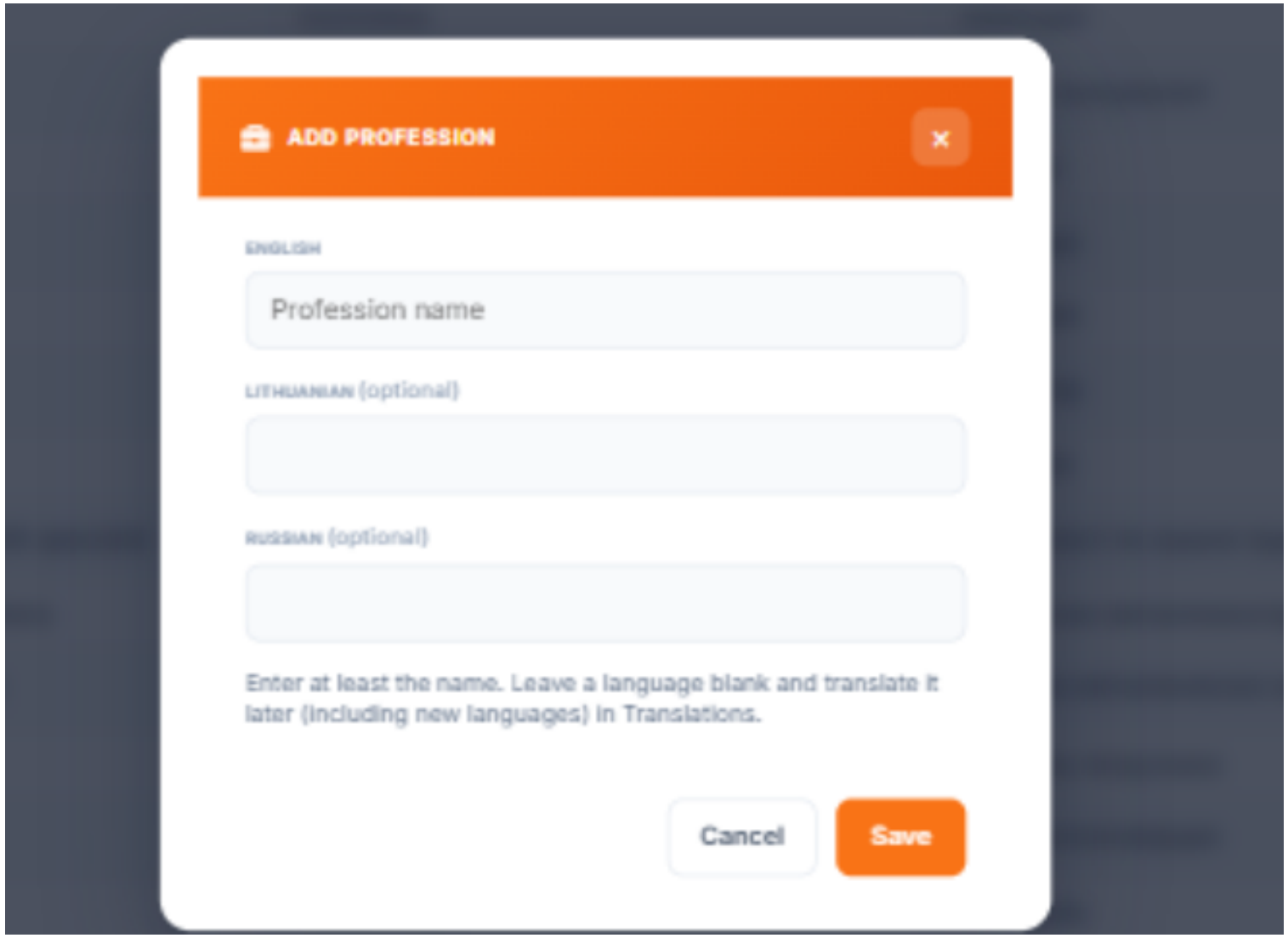


#	ENGLISH	LITHUANIAN	RUSSIAN	SCOPE	ACTIONS
1	administration employee	administracijos darbuotojas	административный сотрудник	GLOBAL	
2	barbender	betono armatūrininkas	арматурщик бетона	GLOBAL	
3	bricklayer	mūrininkas	каменщик	GLOBAL	
4	business consultant	verslo konsultantas	бизнес-консультант	GLOBAL	
5	carpenter	stalius	плотник	GLOBAL	
6	concrete worker	betonuotojas	бетонщик	GLOBAL	
7	concreter	betonuotojas	бетонщик	GLOBAL	
8	Director	Direktorius	Директор	GLOBAL	
9	electrician	elektrikas	электрик	GLOBAL	
10	Employee safety and health specialist	Darbuotojų saugos ir sveikatos specialistė	Специалист по охране труда и технике безопасности	GLOBAL	
11	fitter of a metal constructions	metalinių konstrukcijų montuotojas	монтажник металлоконструкций	GLOBAL	
12	fitter of a metal ship hulls	metalinių laivų korpusų surinkėjas	сборщик металлических корпусов судов	GLOBAL	
13	forklift driver	šakinio autokrautuvo vairuotojas	водитель погрузчика	GLOBAL	
14	Gas and electric welder	suvirintojas dujomis ir elektra	электрогазосварщик	GLOBAL	
15	general builder	statybininkas	строитель	GLOBAL	
16	human resources coordinator	žmogiškųjų išteklių koordinatorė	координатор по кадрам	GLOBAL	

Professions supplies job-title choices across the app and translated values in documents. The table shows names in three languages and whether each profession is global or organization-owned. The lock icon means only a Global Admin can change that global record.

Professions

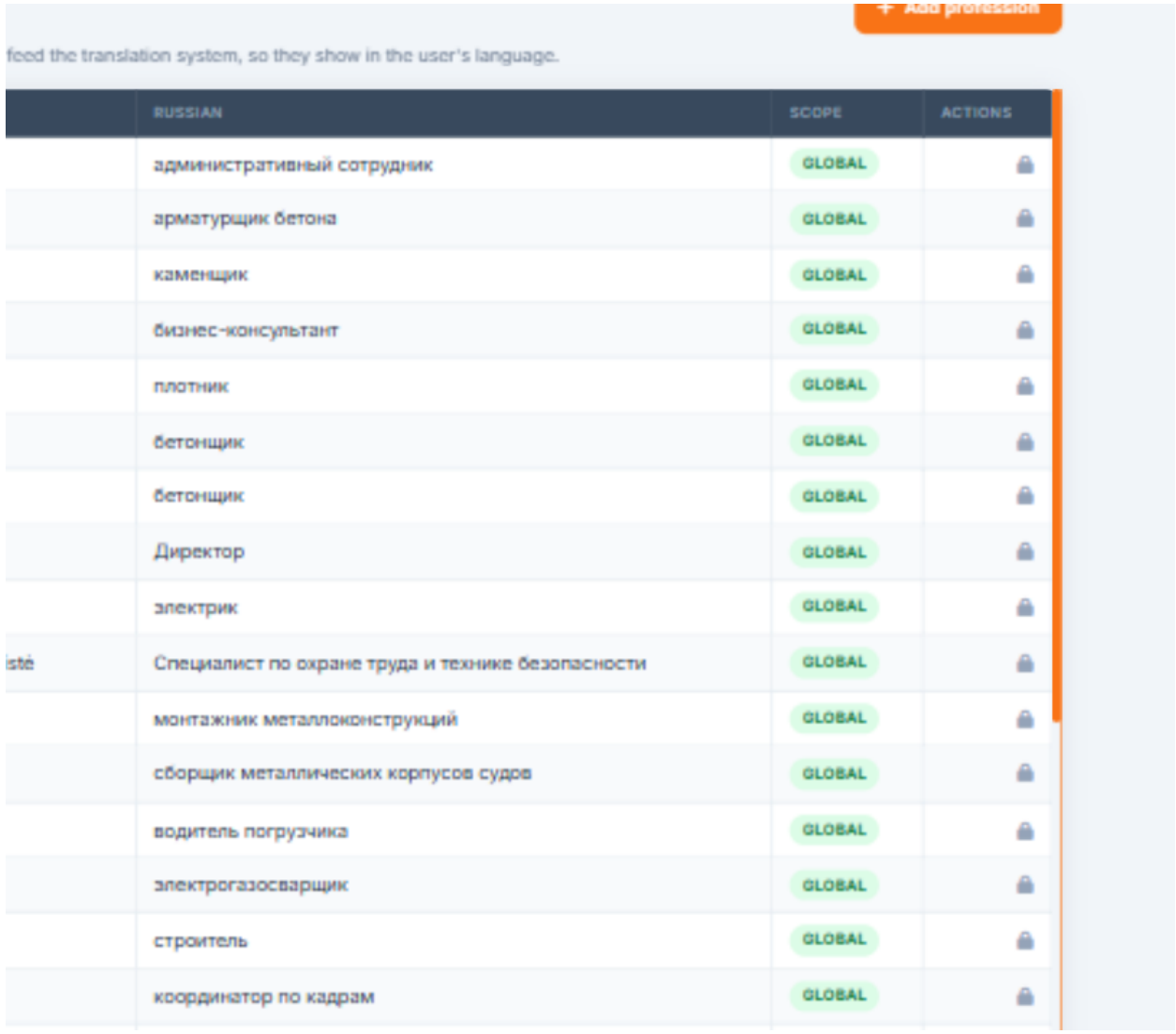
Add an organization profession



Add profession opens an editor with English/name, Lithuanian and Russian inputs. Enter at least the name; translations can be completed later. Save creates the profession for the current organization. Cancel leaves the list unchanged. This demonstration opens the editor without saving a new title.

Professions

Edit or delete where permitted



For an editable organization profession, use its edit action to correct a title or add missing translations. Delete removes a profession that is no longer needed; review its use and confirmation first. Emma sees locked global professions in this presentation list, so the tutorial does not imply she can edit those rows.

Professions

Add more languages

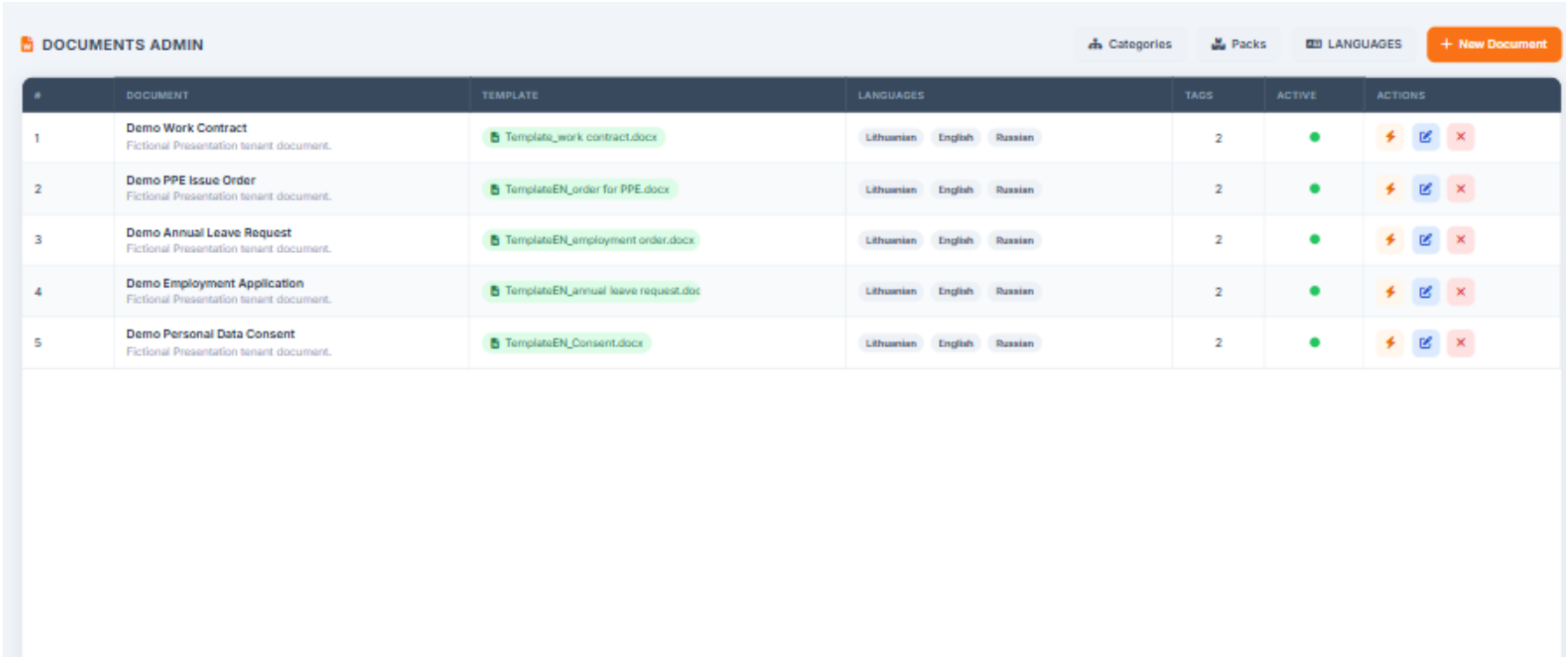


#	ENGLISH	LITHUANIAN	RUSSIAN	SCOPE	ACTIONS
1	administration employee	administracijos darbuotojas	административный сотрудник	GLOBAL	
2	barbender	betono armatūrininkas	арматурщик бетона	GLOBAL	
3	bricklayer	mūrininkas	каменщик	GLOBAL	
4	business consultant	verslo konsultantas	бизнес-консультант	GLOBAL	
5	carpenter	stalius	плотник	GLOBAL	
6	concrete worker	betonuotojas	бетонщик	GLOBAL	
7	concreter	betonuotojas	бетонщик	GLOBAL	
8	Director	Direktorius	Директор	GLOBAL	
9	electrician	elektrikas	электрик	GLOBAL	
10	Employee safety and health specialist	Darbuotojų saugos ir sveikatos specialistė	Специалист по охране труда и технике безопасности	GLOBAL	
11	fitter of a metal constructions	metalinių konstrukcijų montuotojas	монтажник металлоконструкций	GLOBAL	
12	fitter of a metal ship hulls	metalinių laivų korpusų surinkėjas	сборщик металлических корпусов судов	GLOBAL	
13	forklift driver	šakinio autokrautuvo vairuotojas	водитель погрузчика	GLOBAL	
14	Gas and electric welder	suvirintojas dujomis ir elektra	электрогазосварщик	GLOBAL	
15	general builder	statybininkas	строитель	GLOBAL	
16	human resources coordinator	žmogiškųjų išteklių koordinatorė	координатор по кадрам	GLOBAL	

The three displayed languages are not the full limit. In Translations, search for profession. and fill the relevant language column, or use the translation Excel workflow. Documents Admin offers Profession language transforms for active languages so a template can insert the translated job title.

Documents Admin

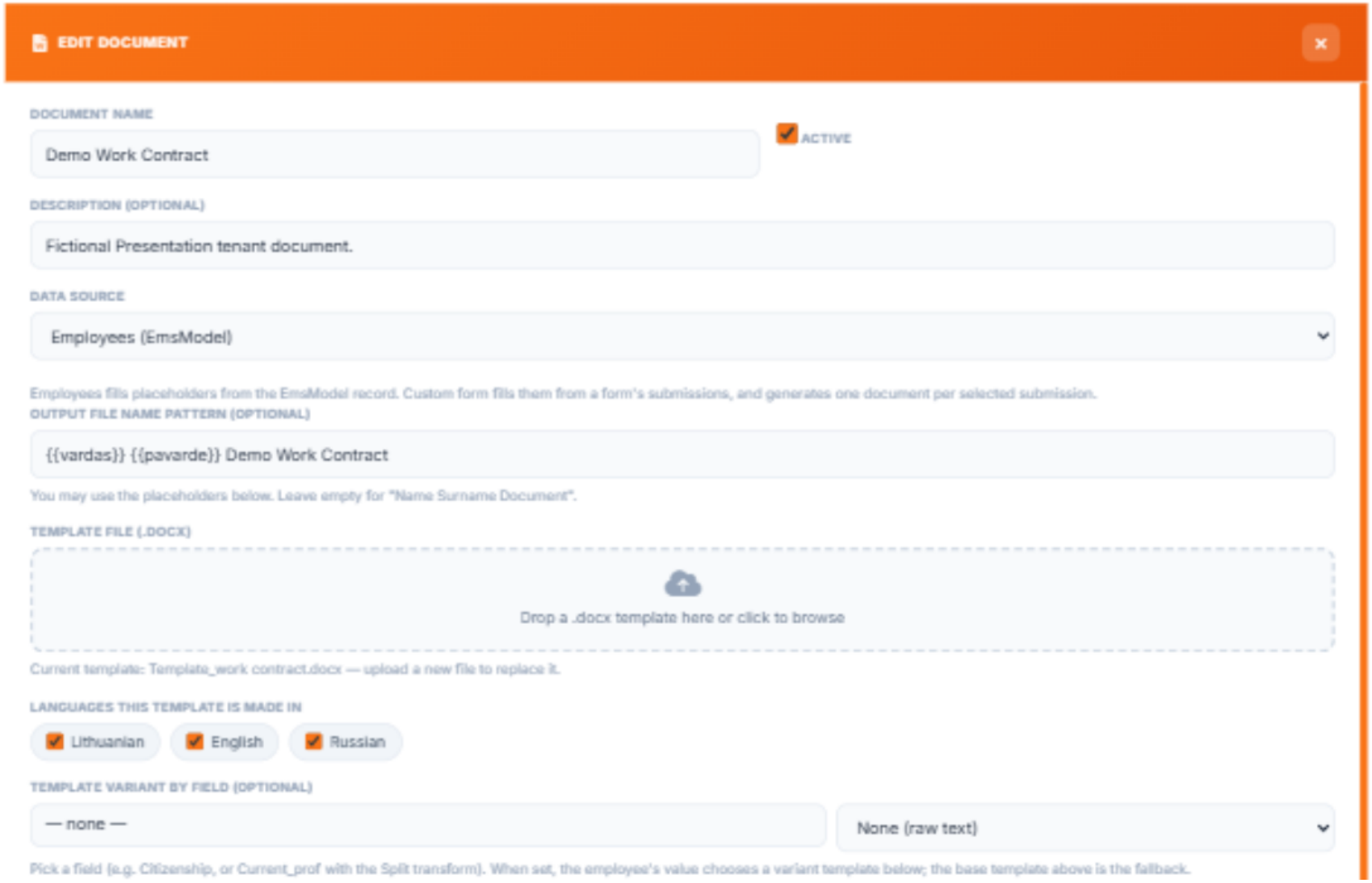
Read the document list



Documents Admin defines what users can generate. Each row shows its name, description, template, languages, tag count and active state. The lightning action generates, the pencil edits, and the cross deletes. Only active documents with a template appear in the generation menu. Remove a document from packs before deleting its definition.

Documents Admin

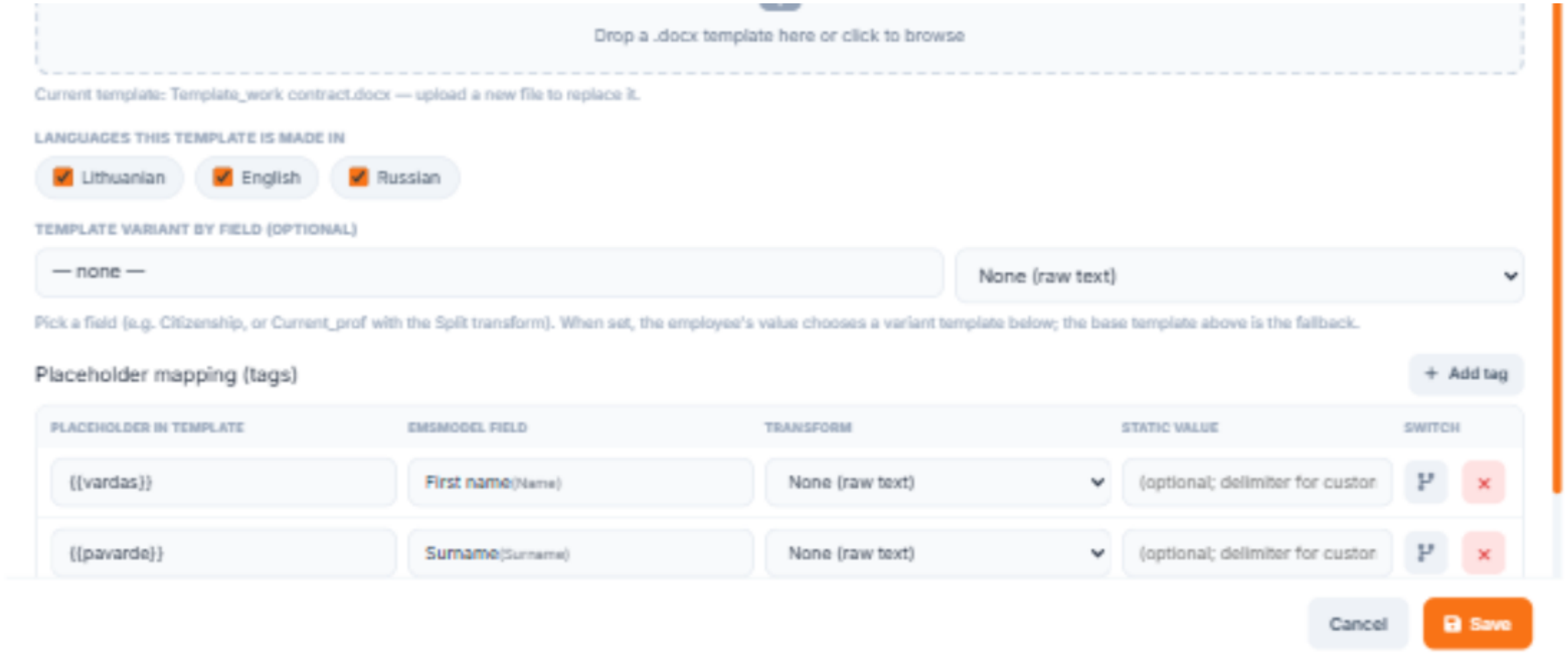
Set source and template



New Document creates a definition; the pencil edits one. Set name, optional description and Active. Employees uses employee records; Custom form uses selected submissions. The output filename may contain placeholders. Upload a .docx template and select the languages it contains; uploading another file replaces the template.

Documents Admin

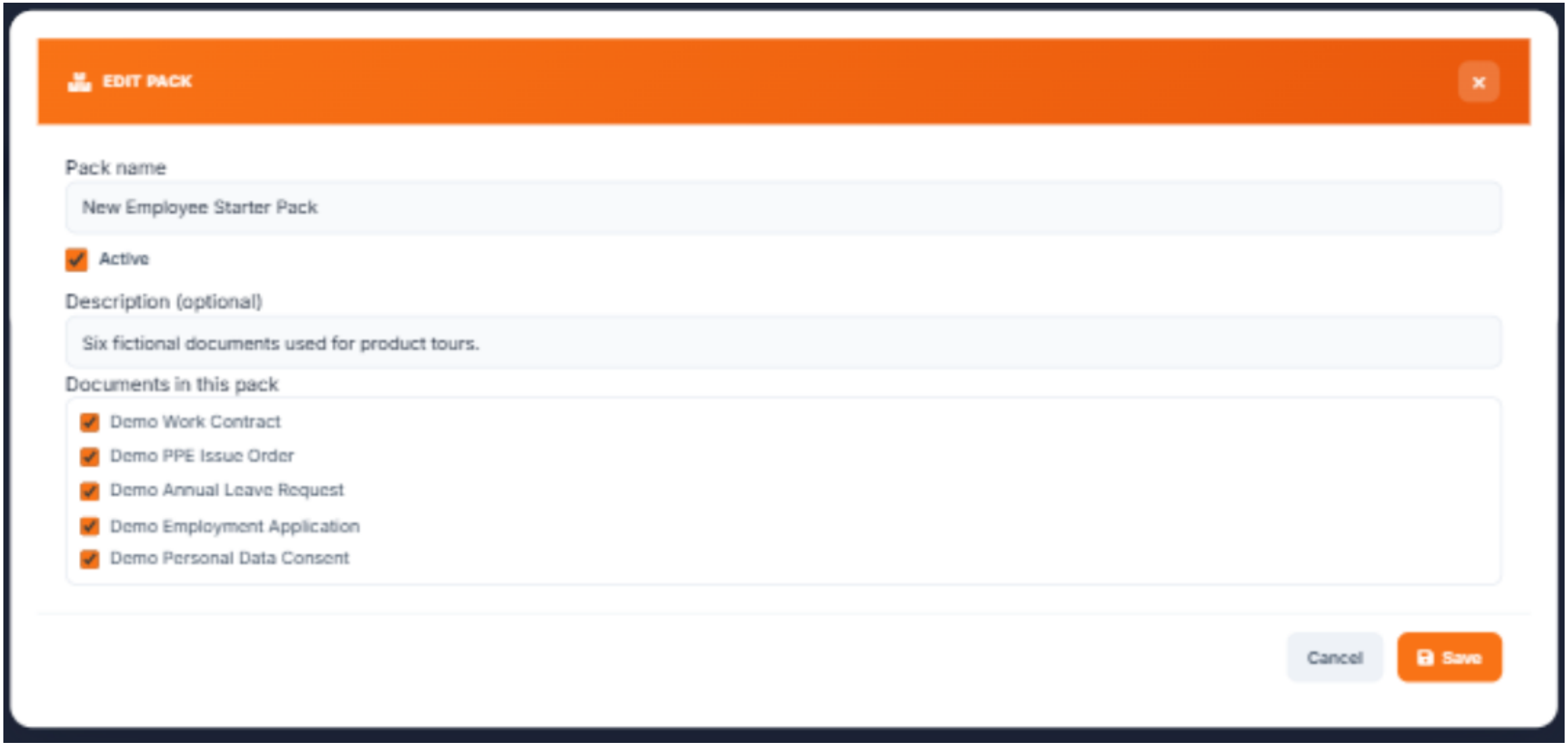
Map tags and variants



Add tag creates a mapping for a literal token such as {{vardas}} in the Word template. Choose an employee/source field or static value, apply a transform for dates, case, splits or translated professions/countries, and use Switch for value-dependent output. A variant field can choose an alternative template; the base template is the fallback. Save after reviewing mappings; Cancel abandons changes.

Documents Admin

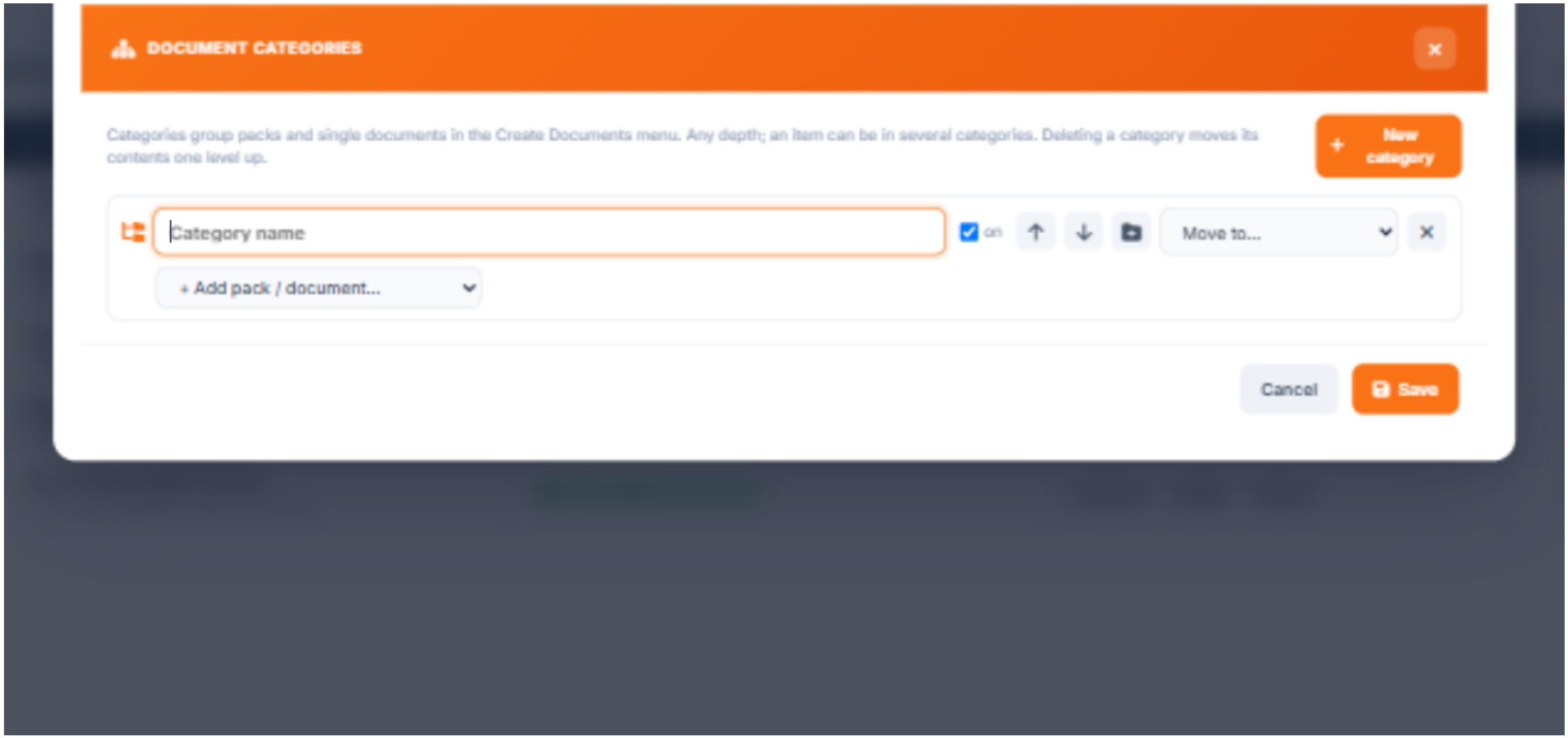
Build reusable packs



Packs groups several documents for each selected person. Create a New Pack or edit an existing one, set name, optional description and Active, then tick the member documents and Save. The pack list also provides generation and deletion actions. A generated pack can be delivered as a ZIP with a folder per person.

Documents Admin

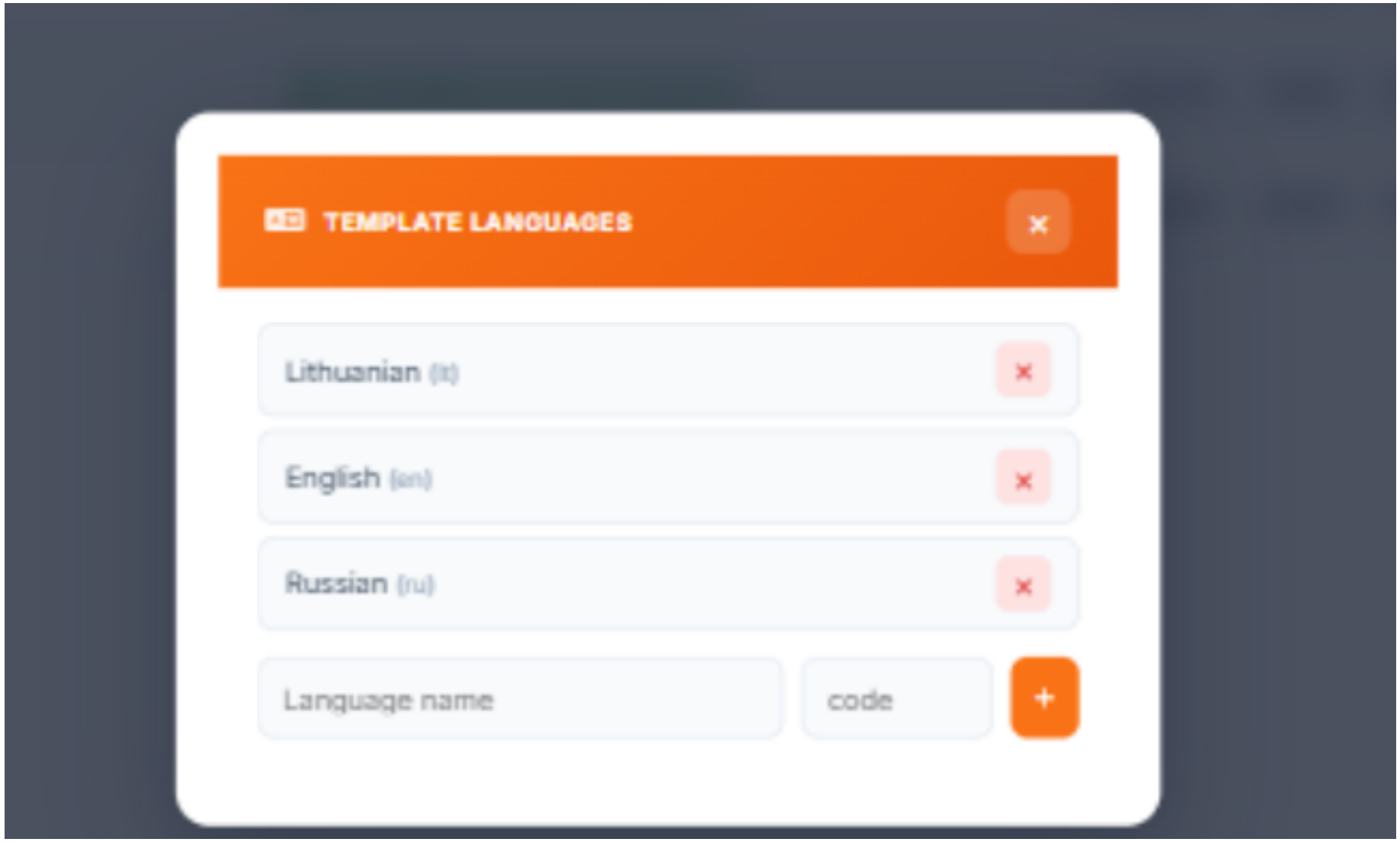
Organize the generation menu



Categories supports names, Active, up/down ordering, subcategories, moving under another category and assigning packs or documents. An item can belong to more than one category. Deleting a category moves its contents one level up. Save commits the tree; Cancel abandons changes. Empty and inactive categories are hidden from the generation menu.

Documents Admin

Manage template languages



Languages manages template language names and codes. A code such as pl also supports a manual salary amount-in-words field and Salary.Words.pl in documents. Lithuanian, English and Russian amounts-in-words are generated automatically. Adding a template language does not translate an uploaded Word document.

Documents Admin

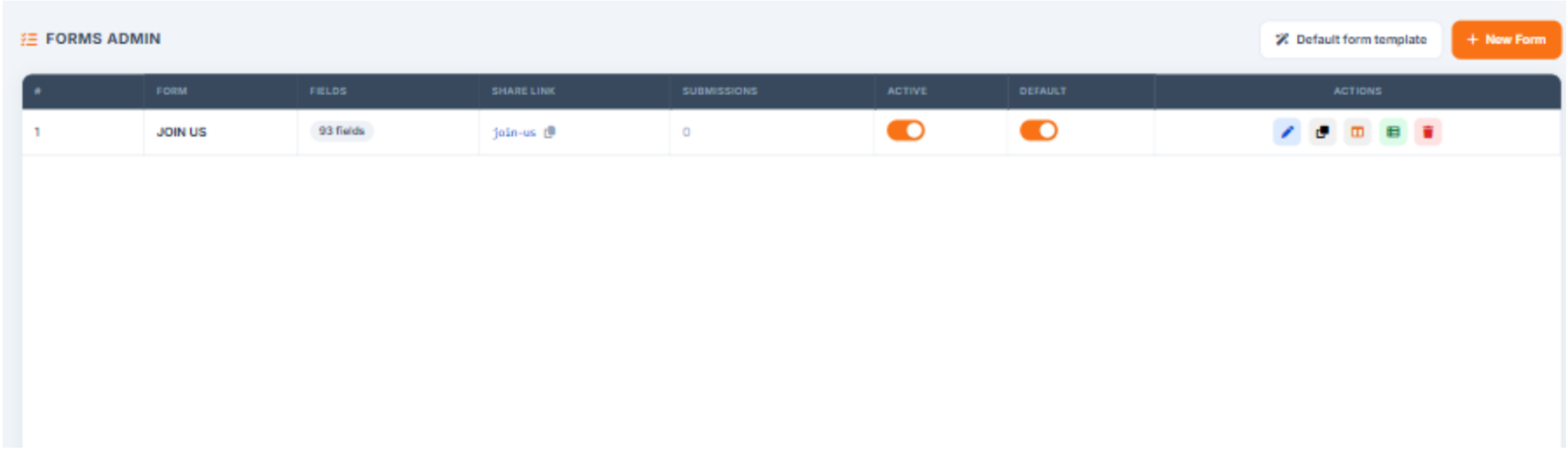
Generate and validate



Generate from a row to choose the people, or submissions for a custom-form source, and download the output. Review every placeholder, date, language and filename before using the template operationally. This walkthrough demonstrates configuration controls without changing definitions or generating a signed document.

Forms Admin

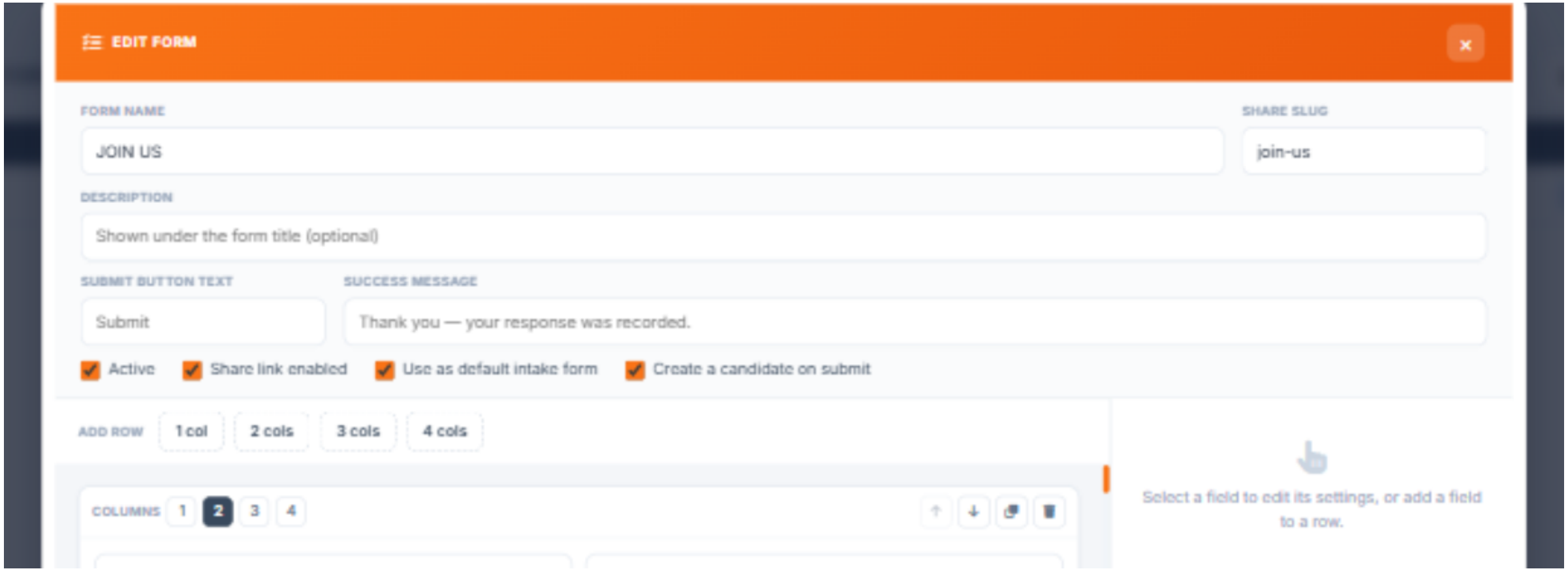
Understand the form list



New Form opens the visual builder. Default form template creates a pre-mapped copy of the standard intake form. Active and Default are separate: the default intake replaces JOIN US on the login page and in the add-person flow. The copy-link action provides the public form address. Submissions shows the collected-response count.

Forms Admin

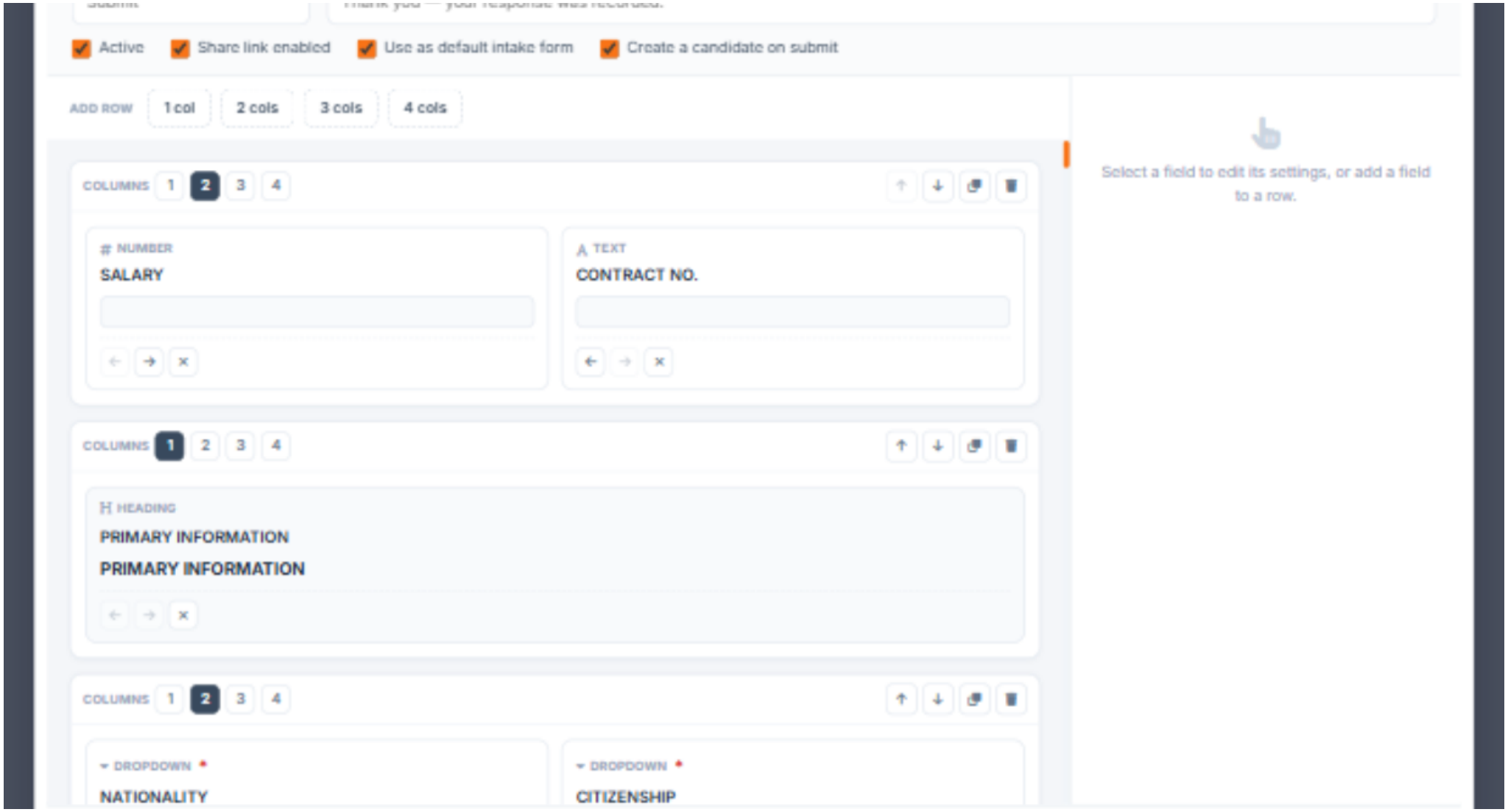
Set form behavior



The builder includes form name, share slug, description, submit-button text, success message, Active, Share link enabled, Use as default intake form and Create a candidate on submit. Check these before sharing. The public link lets applicants submit without signing into UMS.

Forms Admin

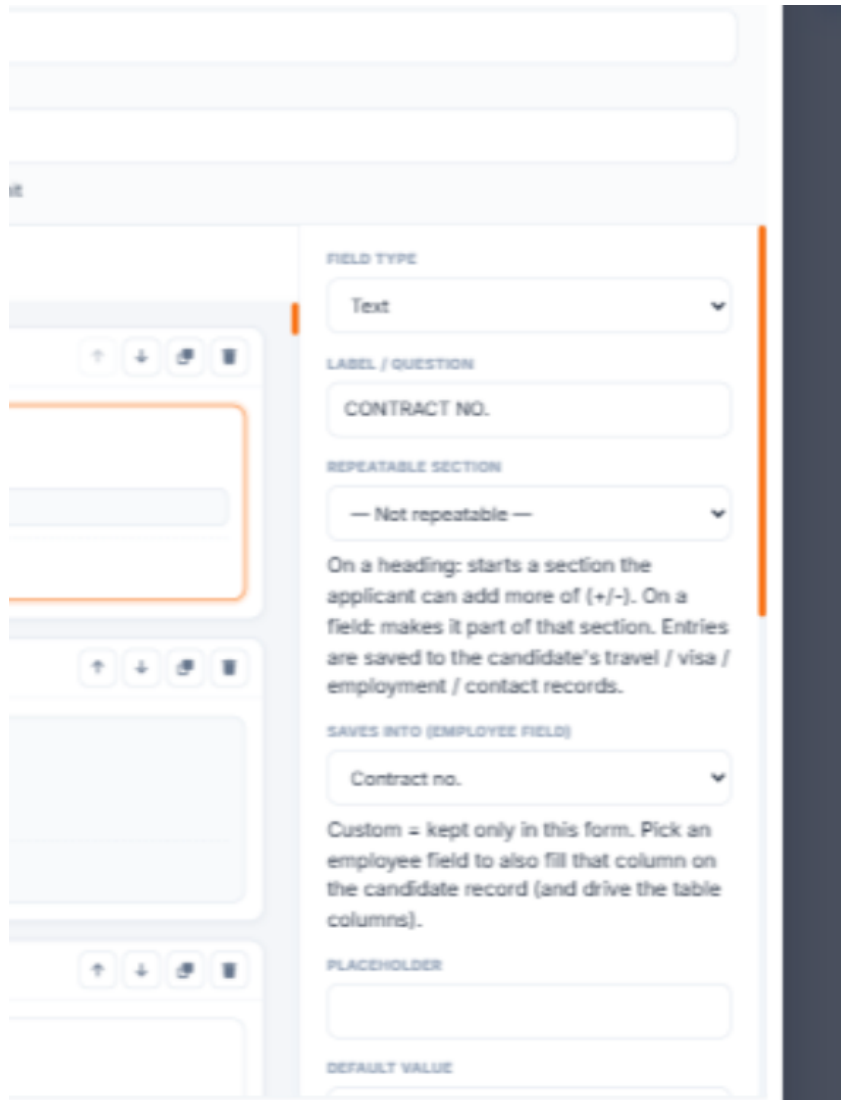
Lay out rows and fields



Add Row offers one to four columns. Row controls change column count, move a row up/down, duplicate it or remove it. Field controls move a field within a row or remove it. Add field inserts another field into the layout. Save form commits the design; Cancel abandons unsaved edits.

Forms Admin

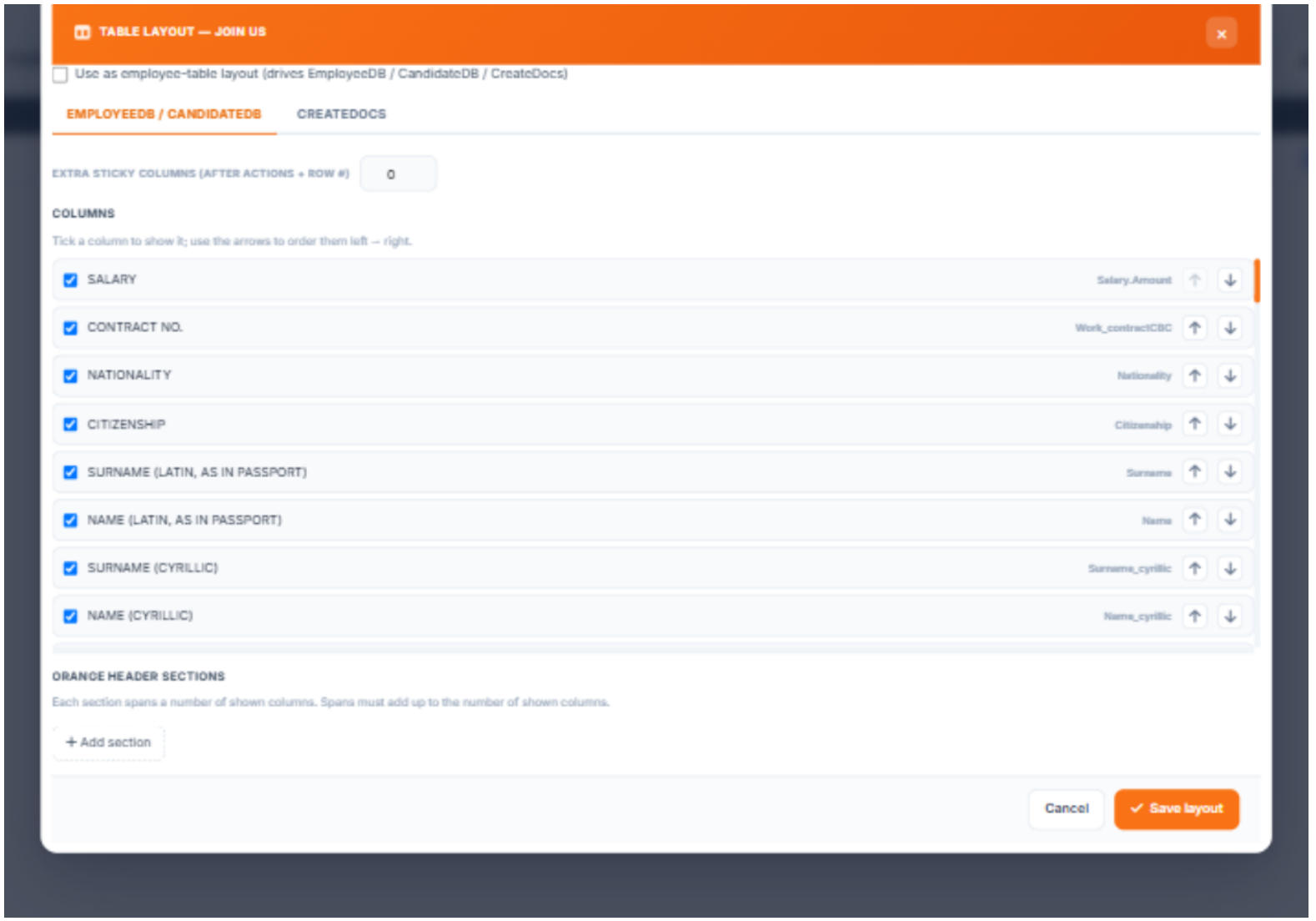
Configure field properties



Select a field to edit its type, label, placeholder, default value and help text. Saves into maps the answer to an employee property; Custom retains it only with the form. Configure Required, Hidden on the public form and section spacing. Show only when makes fields or sections conditional on another answer. Repeatable sections support travel, visas, employment and contacts. Input and column CSS classes support custom styling.

Forms Admin

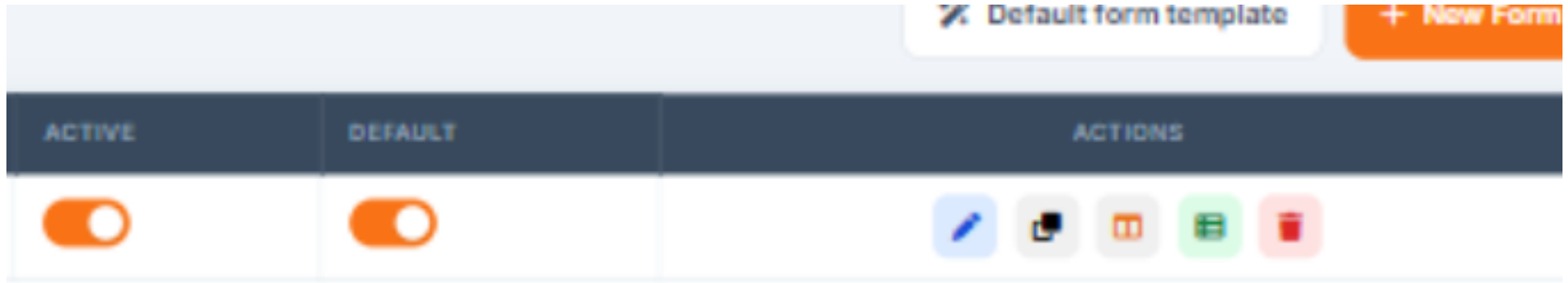
Configure the employee tables



The Table layout action has separate EmployeeDB/CandidateDB and CreateDocs tabs. Tick Use as employee-table layout to make it the active layout. Choose shown columns and order, set extra sticky columns, and define orange header sections whose spans add up to the shown-column count. Save layout applies it. This is separate from choosing the default intake form.

Forms Admin

Review submissions and maintain forms



Submissions opens collected responses; this form currently has zero submissions, so no populated-response workflow is illustrated. Duplicate starts another version. Delete removes the design but keeps already-collected submissions in the database, as the page states. Global Admin may also have Copy to another tenant; Emma does not have that action here. Review form behavior and public availability after any saved change.