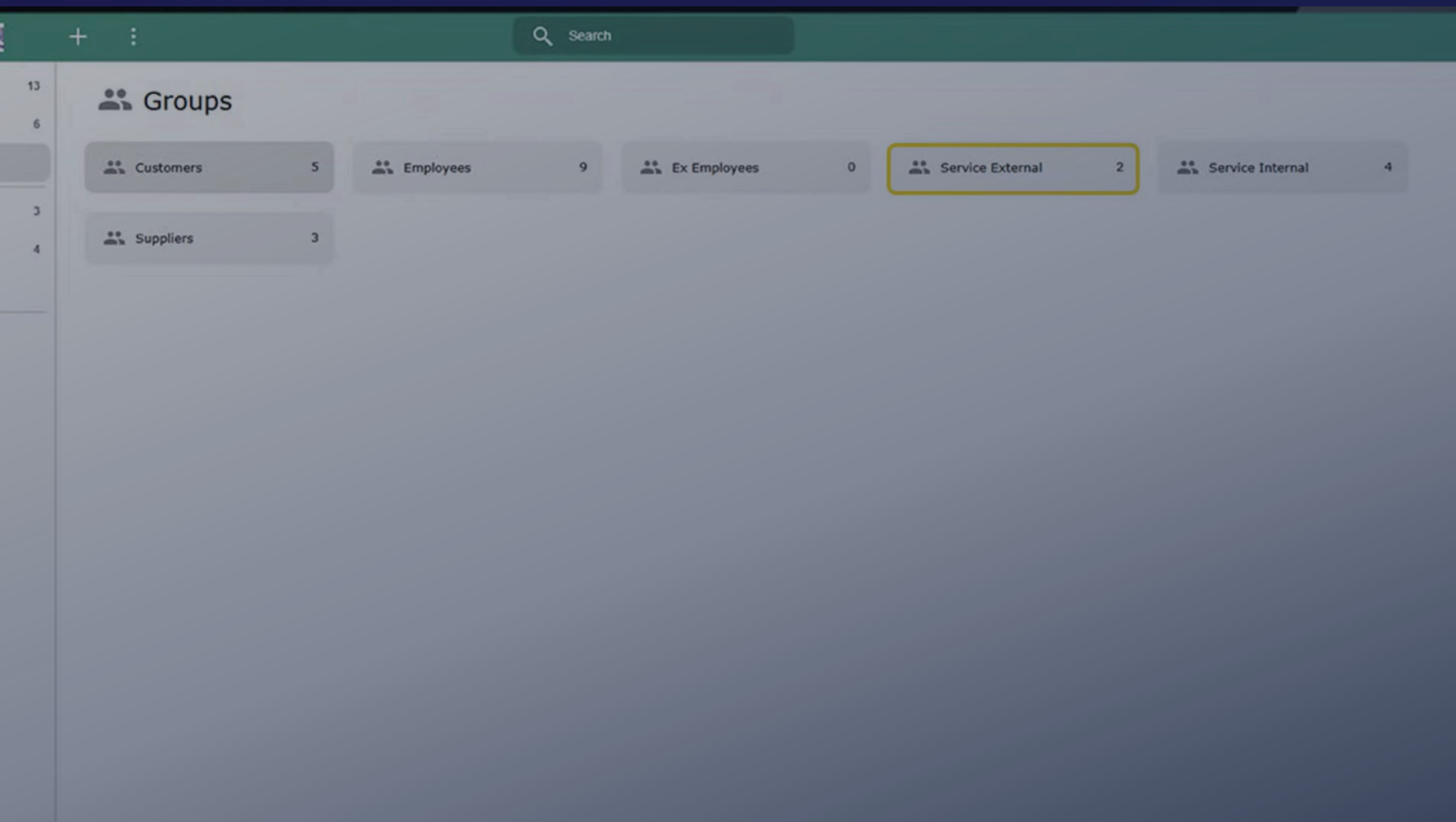




FEATURE GUIDE

KYNECTION • HUMAN RESOURCES • HR SETUP

Organise Contacts, Recruitment *Stages and Inductions*

Grouping contacts so the right people land in the right workflow, then using the stages board to track a candidate from application through to onboarding.

3 CHAPTERS

1 MIN 43 SEC

HUMAN RESOURCES

WEB USERS • HR ADMINISTRATORS

FEATURE GUIDE • 1 MIN 43 SEC

What this feature covers

Three stages, seven steps: finding contacts, building groups, and running the recruitment pipeline.

CH 01	Find contacts and groups Contacts is a separate module from HR, and groups are how it is organised.	00:00–00:41
CH 02	Build groups and assign contacts A new group is created from the same screen and can be scoped by contact, company, group or region.	00:41–01:00
CH 03	Run the recruitment pipeline The stages tab is the pipeline: who is where, and what is outstanding.	01:00–01:43

- **Groups drive workflow.** Customers, Employees, Ex Employees, Service External, Service Internal and Suppliers each behave differently, so the group a contact sits in decides what happens to them.
- **Stages are per role.** The stages board shows application, interview and onboarding progress against each person.
- **Set induction stages first.** Multi-stage onboarding has to be enabled in induction settings before the pipeline shows more than one stage.

READ AS Screens are captured from the walkthrough video at the timestamp shown on each step. Names, dates and rates are demonstration data.

Find contacts and groups

Contacts is a separate module from HR, and groups are how it is organised.

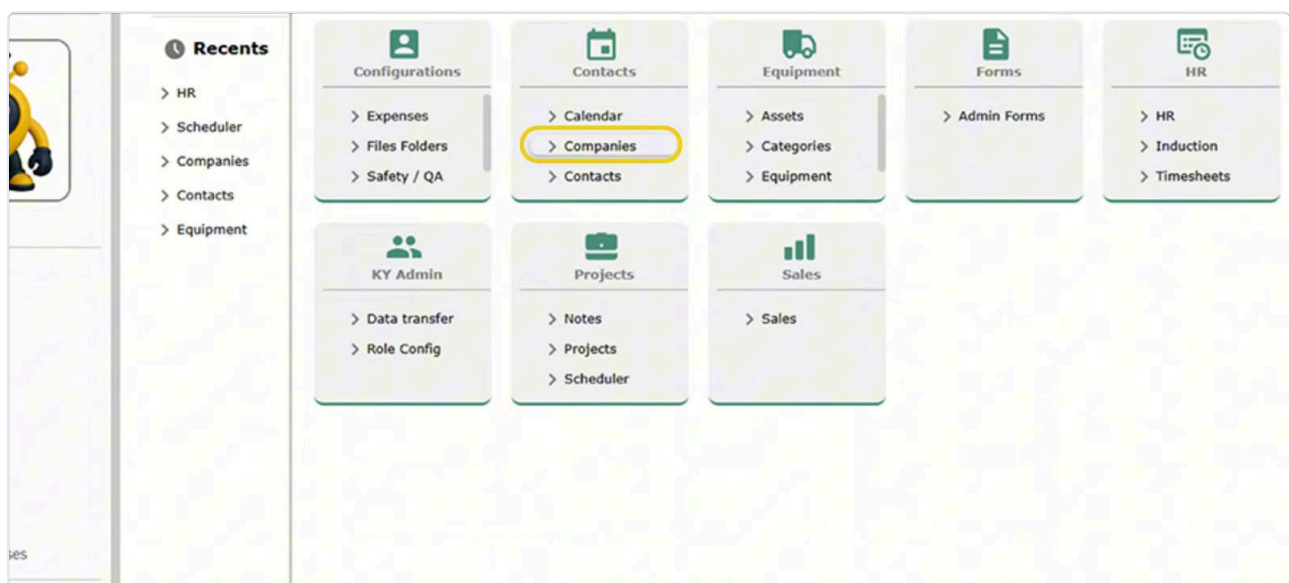
Team (HR) Training Guide Web

STEP 1 • 00:12 IN THE VIDEO

Open Contacts

From the dashboard, open **Contacts**. It sits alongside HR under Configurations, with its own calendar, files, folders and safety records.

CHAPTER 01 • STEP 1 OF 3



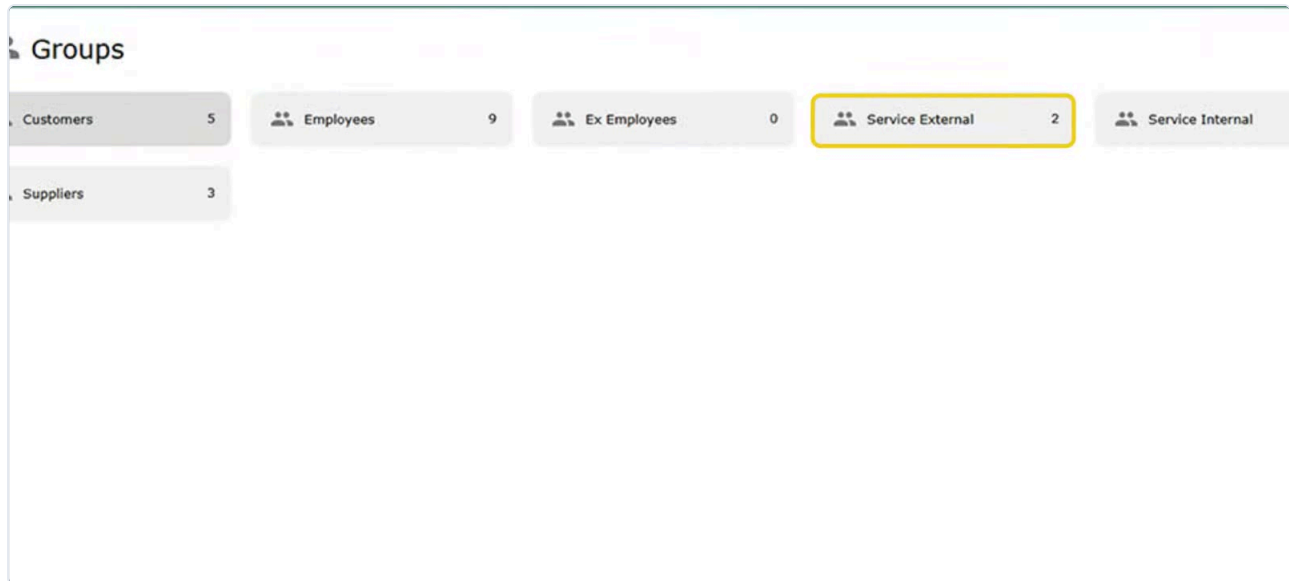
STEP 2 • 00:20 IN THE VIDEO

Read the contacts navigation

The left pane offers contacts, companies, groups, my team, regions, record, activity and options.

CHAPTER 01 • STEP 2 OF 3

Find contacts and groups



STEP 3 • 00:33 IN THE VIDEO

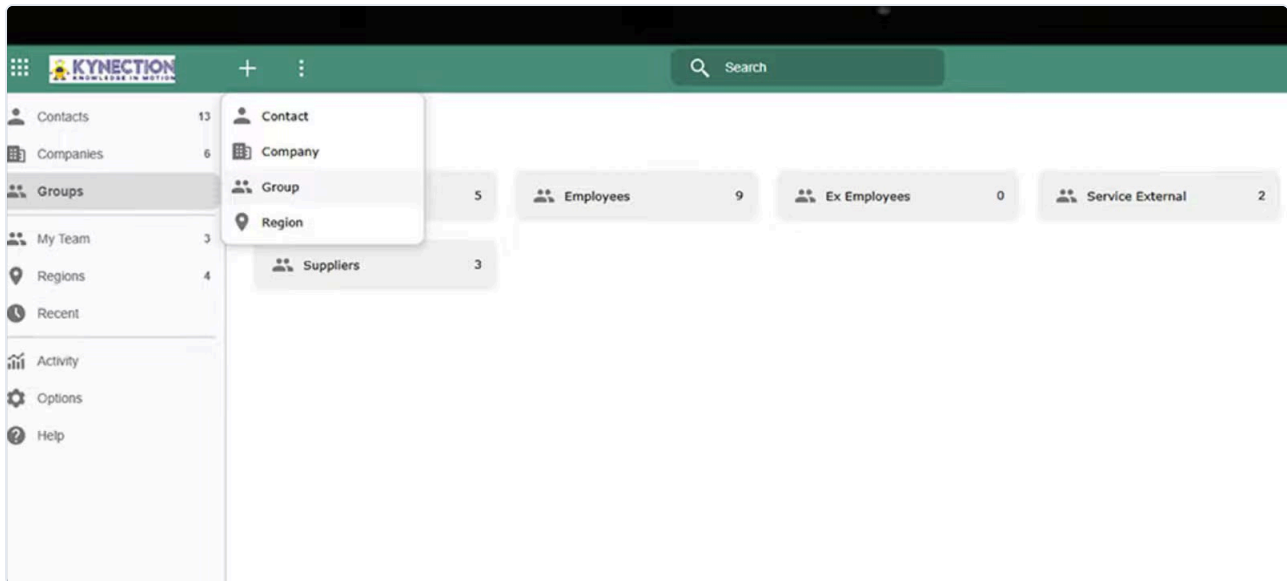
Open Groups

Groups shows each category with its count: Customers, Employees, Ex Employees, Service External, Service Internal and Suppliers.

CHAPTER 01 • STEP 3 OF 3

Build groups and assign contacts

A new group is created from the same screen and can be scoped by contact, company, group or region.

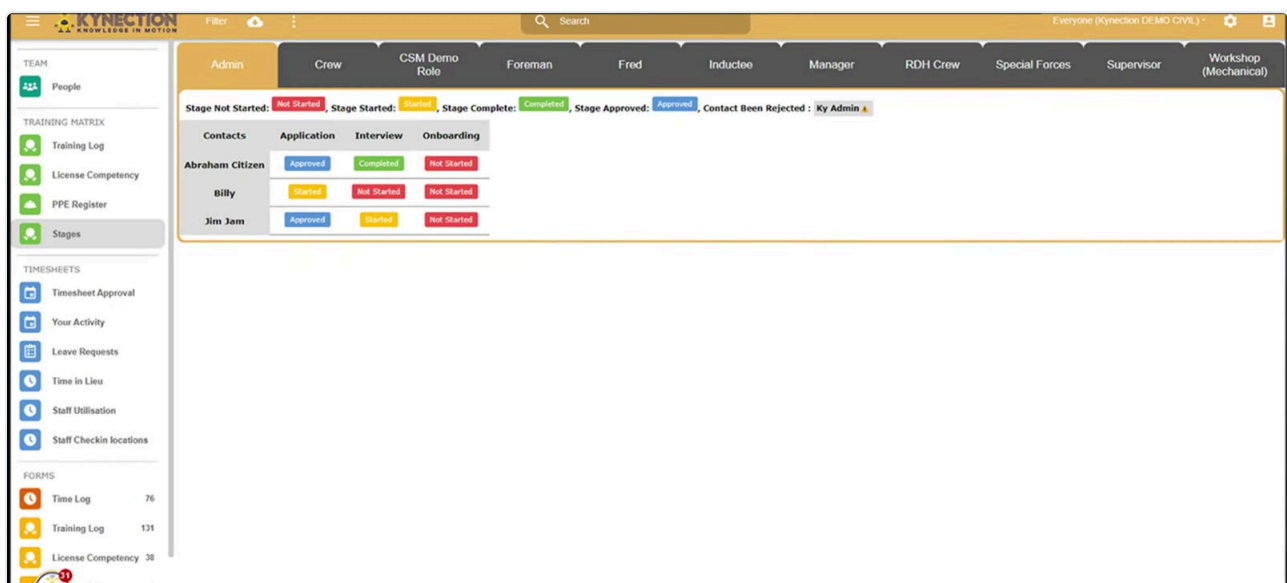


STEP 1 • 00:45 IN THE VIDEO

Create a new group

Adding a group offers contact, company, group and region as the basis, so a group can be as broad or as specific as the workflow needs.

CHAPTER 02 • STEP 1 OF 2



STEP 2 • 01:02 IN THE VIDEO

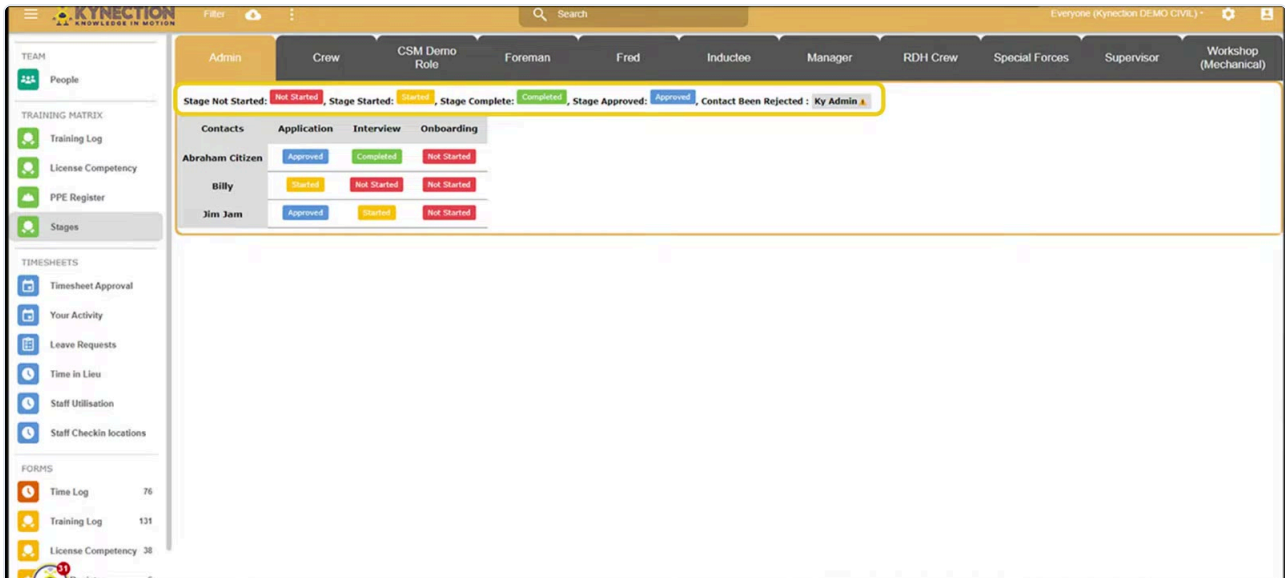
Assign contacts to a workflow

The stages board shows each person against Contacts, Applications, Interviews and Onboarding, with a status on every cell.

CHAPTER 02 • STEP 2 OF 2

Run the recruitment pipeline

The stages tab is the pipeline: who is where, and what is outstanding.

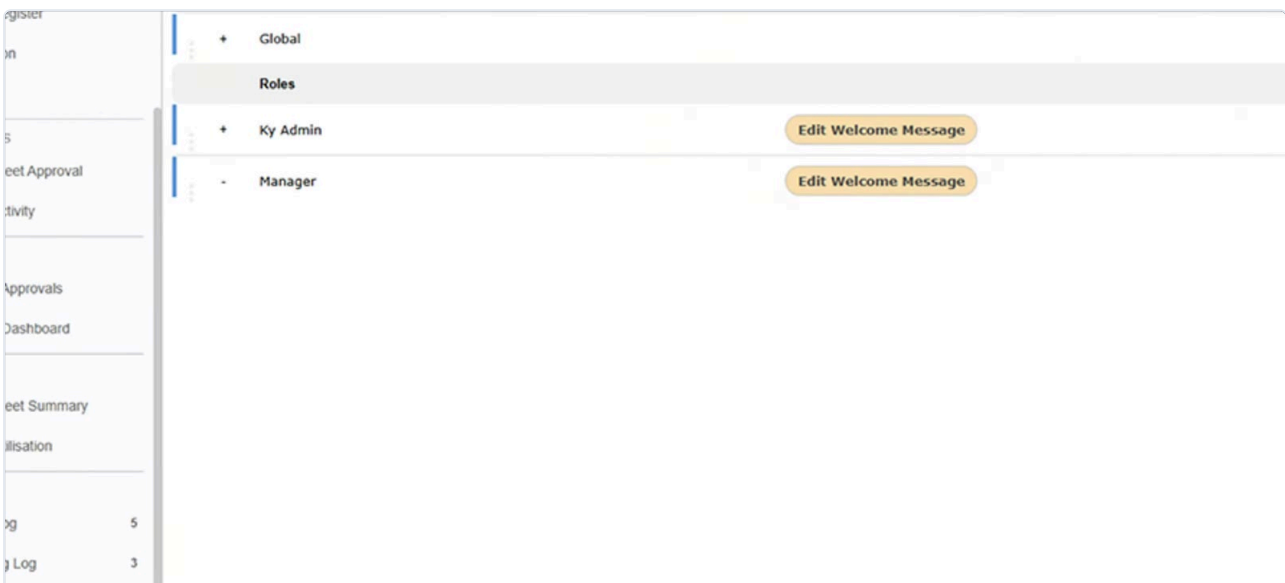


STEP 1 • 01:05 IN THE VIDEO

Track candidates by role

Roles run across the top of the board, from Admin and Crew through Foreman, Inductee, Manager and Supervisor, so you can see the pipeline by position rather than as one long list.

CHAPTER 03 • STEP 1 OF 2



STEP 2 • 01:28 IN THE VIDEO

Customise induction and onboarding

Each role can carry its own welcome message, edited from the roles list. This is what a new starter sees when their onboarding begins.

CHAPTER 03 • STEP 2 OF 2

Where to go next

This guide covers one part of the HR module. The rest of the series covers the module end to end.

NEXT UP - HR Setup 03

Configure EBAs, shifts and allowances

BACK TO HR Setup 01

Set up roles and training requirements (module overview)

THE REST OF THE HR MODULE

Ask your Kynecton account manager for the other HR setup guides

MORE IN THIS MODULE

HR Setup 01	Set up roles and training requirements (module overview)
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HR Setup 03	Configure EBAs, shifts and allowances
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HR Setup 04	Track staff compliance, training and pay
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