Getting Started with ICX HR

A practical guide for Company Admins, Managers and Employees

Your ICX HR workspace

Sign in at **https://hr.iconns.co.uk**. Your email address automatically opens the correct company workspace and role permissions.

1	**Activate your account**	Use the secure activation link in your welcome email.
2	**Complete company setup**	Check company details, regional format and HR settings.
3	**Add your people**	Create employee records, assign positions and optional login access.
4	**Start everyday HR**	Use Time Off, Timesheets, Documents, Alerts, Tasks and Training.

ICX HR is designed so the Company Admin can configure the workspace while employees and managers see only the information and actions relevant to their role.

1. First login and account security

Your first email contains a secure activation link. The link is one-time use and expires automatically.

1. Open the activation email and select **Activate Account**.

2. Create your password, then sign in with your email address.

3. On an untrusted device, ICX HR sends a 6-digit email OTP. You can trust that device for up to 30 days.

4. If an account is locked after repeated incorrect passwords, use the secure reset/unlock email flow.

> **Install ICX HR as an app**
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> Windows/Mac/Android users can use the browser install option. On iPhone or iPad, open ICX HR in Safari, tap **Share**, then **Add to Home Screen**.

2. Complete company setup

Company Admins should review the company record before inviting the wider team.

1. Open **Settings** and confirm Company profile information.

2. Review **Regional & format** settings so dates and company information are correct.

3. Review **HR modules**, **Alerts & notifications**, and **Access & security**.

4. Check **Billing & usage** for active-person count, rate, payment details and subscription management.

3. Add people and organise your company

Create one person record per employee. The same person can have HR responsibilities without creating duplicate employee records.

1. Open **People** and choose **Add person**.

2. Enter the person's name, position, company start date and employment details.

3. Assign a direct manager, team, department, location and working pattern when needed.

4. Enable login access only when the person needs self-service access. Choose Employee or Manager access as appropriate.

5. Use the employee profile to maintain Professional, Personal, Emergency Contacts, Documents, Assets, Tasks, Training and lifecycle information.

Personal details: Date of birth, nationality, gender, marital status, personal contact details and home address are maintained separately from professional employment details.

> **Positions and history**
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> The current Position, Position Start Date and time in role appear in Professional -> Work. When the position changes, ICX HR keeps the previous assignment in Position History.

4. Roles and access

Use the minimum access needed for each person.

Company Admin	Company-wide HR administration and settings.
Manager	Own record plus permitted/assigned employees and approvals.
Employee	Self-service access to their own permitted HR information.
Records only	Employee record exists but there is no login account.

5. Time Off

Use Time Off to track entitlement, requests and approvals.

1. Review the company Time Off policy and entitlement settings.

2. Employees submit requests from their own workspace.

3. Managers/HR review requests according to permissions.

4. Entitlement can be managed for joiners/leavers and approved beyond entitlement when company policy allows.

6. Timesheets

Timesheets are organised by ISO week with Start, Finish, Break and weekly totals.

1. Select the required **Year** and **Week**, including previous years.

2. Enter Start, Finish and Break for each working day.

3. Review Weekly total, Standard week and Overtime.

4. Submit for approval where the company uses approval workflow.

Historical records

Use the Year and Week selectors to move through previous periods. Historical timesheets remain separated by week for clear audit history.

7. Documents and expiry alerts

Keep employee documents in the employee record and use expiry information for time-sensitive items.

1. Open the employee -> **Documents** area and upload the required file.

2. Record document category and expiry information where relevant.

3. Use Alerts & notifications so the right employee, manager or HR/Admin is notified before expiry.

4. Private uploaded files remain scoped to the client workspace.

8. Tasks, Training and lifecycle

Use these modules to manage actions around people rather than keeping separate spreadsheets.

1. Tasks: assign and track employee-related actions.

2. Training: record training activity and status.

3. Onboarding: manage structured steps when a person joins.

4. Offboarding: track controlled steps when a person leaves.

5. Calendar: review relevant HR dates in one place.

9. Billing and subscription

Company Admins can review the subscription from Settings -> Billing & usage.

1. Review active-person usage and the current effective rate.
2. When a special client rate has been agreed, the billing page shows that effective rate.
3. If the subscription is linked to Stripe, ICX HR can show the next payment date and masked card details (for example Visa •••• 4242).
4. Use **Cancel subscription** to request cancellation at the end of the current paid period. Where available, cancellation can be withdrawn before it takes effect.

> **Payment security**
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> ICX HR never displays or stores a full card number or CVC. Only safe payment metadata such as card brand, last four digits and expiry may be shown.

10. Reports and administration

Use Reports for management information and Settings for company-wide controls. Keep Company Admin access limited to trusted administrators.

11. Recommended day-to-day workflow

A simple routine keeps the HR record accurate and useful.

1. Keep employee Professional and Personal details up to date.

2. Process Time Off and Timesheet approvals regularly.

3. Review Alerts for expiring documents and outstanding actions.

4. Archive/leaver records instead of deleting normal employee history.

5. Use permanent deletion only when data must genuinely be removed.

12. Need help?

The guide is available inside ICX HR so you can reopen it later. For account access, the Company Admin can resend invitations or password-reset links from the relevant user/client controls.

ICX HR

Workspace: https://hr.iconns.co.uk
Service: Smart People Solutions
Guide: Open the User Guide link from the ICX HR sidebar at any time.

This guide describes the major day-to-day options. Your available modules and actions can vary according to your role, company settings and permissions.