questico.site

Employee Records & Onboarding

User manual

Inside your tool it is called “Parichay”.

A staff directory and HR file for a business of 5 to 200 people, with joining and exit checklists, a document checklist, an org chart and everyone's birthdays and work anniversaries.

1. Your tool at a glance

Small businesses keep staff details in registers, spreadsheets and phone contacts, so nobody knows whose documents are missing, who reports to whom or whose probation ends next week. Parichay puts the whole team in one directory, lets each employee keep their own emergency and personal details up to date, and gives HR joining and exit checklists, a document checklist and private notes. The owner sees headcount, who is joining, who is leaving and whose file is incomplete at a glance.

Made for: Businesses with 5 to 200 employees across one or more locations, such as clinics, labs, offices, schools and shops, where the owner or an HR person looks after staff records.

Who can do what

Your tool has 3 role profiles. Everyone signs in with their own email address and sees only what their role allows.

Role	Usually	Can	Cannot
Owner	The business owner or director	• Do everything a manager can do • Give team members access to the tool when adding or editing an employee (the only role that actually sends the invitation) • Change a person's access between Staff and Manager • Remove a person's access by deleting their record or marking them as left • Add team members from the Questico owner console (Team section) by typing their email address and choosing "Can use it" (staff) or "Can manage it" (manager)	• Invite themselves
Manager	An HR person, office manager or department head	• See the whole directory, including people who have left, and the status filter • Add and edit any employee • Print ID cards and employee record sheets • Manage exits, probation, documents, checklists and HR notes • Download the directory, documents and HR notes as CSV files	• Give new staff access to the tool; the app shows "Only the owner can give new staff access to this tool."
Staff	Every other employee	• See the staff Home, the Directory (current staff only), My profile, the Org chart and Celebrations • See a colleague's Overview tab • Edit their own personal record • Add or change their own photo, if allowed • Choose whether their birthday is shown to the team	• Tick their own documents or checklist items • See other people's personal records, documents or HR notes • Edit their own directory entry such as department or extension • See onboarding, documents or HR notes screens

What staff can do in each list

These rules are kept by Questico's database, not only by the screens: a staff member who finds a way past a screen is still refused. They are for staff: owners and managers are not held to them.

Employee records

- Staff see every entry.
- Staff can't add entries.
- Staff can't change entries.
- Staff can't delete entries.
- An entry is a staff member's own when it is their own record.
- On their own entries only, staff may change only the photo and the birthday.

2. Getting started

Ready when you buy

- Your business name (and its short form) is set from checkout, and your contact details replace the demo's.
- The demo business is gone: its people, customers, vendors and figures are not in your copy. City and address start empty for you to fill in.
- Lists such as departments start with a common set; change them to match your business in the admin panel.

Where your tool lives

- Your tool has its own address, such as yourbusiness.questico.site. Open it on a phone or a computer.
- You can also open it from your Questico account: Your space → Paid, or your console, where the tool shows three buttons: Open the tool, Edit website (the admin panel) and Team.

Signing in: there are no passwords

- Everyone opens your tool's address and presses Sign in, then signs in with the email you added for them, in one of two ways.
- With Google: press "Continue with Google". For a Gmail address, or a work email that is a Google account (Google Workspace). Google looks after the password and security.
- With any other email (Outlook, Zoho, your company's own mail): under "No Google account? Use any email", type the address and press "Email me a code". Questico emails a 6-digit code; type it in and you are in. The code works once and expires soon.
- Someone who signs in but has not been added sees "You're signed in, but not invited yet" until you add their address.

Adding your team

1. One person at a time: inside the tool, open Team and add their name and email address, and choose Staff or Manager. Saving gives them access and puts them on the tool's own list.
2. Everyone at once: in your Questico console, open the tool's Team section → Add many from Excel. Download the template, fill one row per person (name, email, access, and if you like mobile, department, designation and joining date), and upload it. You see every row checked before anything is added. Uploaded people get access and appear on the tool's own list too.
3. Your whole company, for all your tools: Your space → Your company team. Upload your staff sheet once (name, email, employee ID, department, designation, function, mobile, joining date, access, and Active or Left), then press Apply beside each business tool. New people get access and appear on the tool's own lists. Applying never changes the access someone already has in a tool. To take someone off, mark them Left: the next Apply removes their access, and their past records stay. Someone simply missing from a new sheet is not treated as having left.

Partners as owners

- If you run the business with partners, make them owners too: in your console, the tool's overview has an Owners card. Type a partner's email and press Add an owner. Up to five owners in all.
- They become owners the next time they sign in to Questico with that email, and can then do everything you can: the admin panel, the team, and asking for changes. The tool shows in their own Your space under Sites you co-own.

- Any owner can remove a co-owner, and a co-owner can leave. The person who bought the tool always stays an owner.

Sending the invitation, and seeing who has joined

- Questico emails each person an invitation as soon as you add them, however you add them: one at a time, from Excel, or from your company team. It tells them your tool's address and how to sign in, with Google or with a code.
- In the console's Team section, "Remind the N not signed in" emails everyone who has not joined yet. Under "Send the invitation" you can also copy the ready message for your team's WhatsApp group.
- The same page counts who has joined and who has not signed in yet, lists everyone with the date they were invited and the date they joined, and downloads the list for Excel.
- To change someone's access or remove them, use the tool's Team screen or the console's Team section. Their past records stay.

The emails Questico sends your team

Questico tells people when something needs them, by email from notices@questico.site, so nobody has to keep the tool open to find out.

Within a few minutes

- The person who asked: "Your joining checklist is ready: open the staff directory to follow it."

Several things at once come as one email, never a flood. Each email says what happened and links to your tool. Anyone can stop them: the link at the foot of each email stops that business's notices for that person, and the same link turns them back on. Invitations and sign-in codes still arrive.

Changing your settings

In your console, press Edit website to open your tool's admin panel. Change the name, logo, colours, words, pictures, lists and rules; every change shows in a live preview first. Records (the day-to-day entries) are made inside the tool itself.

Everyday features

- On a phone the menu moves to a bar at the bottom, and tables turn into cards.
- Anything printable opens your browser's print window, where you can also choose "Save as PDF".
- Lists and reports download as CSV files that open in Excel.
- WhatsApp messages open ready-written; you press send. Nothing is sent automatically.

3. Your first day

1. Try the demo first: switch "View as" between owner, manager and staff to see what each person will see
2. Open the admin panel from "Edit website" in the Questico console and set the business name, logo, colour and HR contact (name, email, WhatsApp)
3. Replace the sample lists with your own: departments, designations, locations, employment types and checklist task owners
4. Set the employee code prefix and number of digits
5. Set the probation months and the notice period
6. Edit the joining and exit checklists, the list of documents to collect and the kinds of HR note

7. Decide what colleagues can see: desk extensions and work phones, staff photos, birthdays and anniversaries
8. Inside the tool, add each employee with their email address and choose Staff or Manager access; the owner's save sends the invitation
9. Alternatively, add team members from the Team section of the Questico console: type their email address and choose "Can use it" (staff) or "Can manage it" (manager)
10. Ask each person to sign in with that email address (with Google, or a code Questico emails them) and fill in their personal details

4. Everything it does

Home (owner and managers)

- See headcount, number of locations, people joining soon and people serving notice in the greeting
- Jump straight to "Add new joiner" or the Directory
- Watch headcount with a 12-month trend line and the change
- Track onboarding: open joining checklists and overdue tasks
- Track leavers: who is on notice and the next last working day
- See how many staff files are missing required documents
- Follow every open joining and leaving checklist with its progress and overdue count
- See a bar chart of people on the rolls at each month end for the last 12 months, with joined and left totals
- See what is coming up in the next 14 days: birthdays, work anniversaries, joinings, last working days and probation ending
- Get a prompt to mark someone as left once their last day has passed
- Get a prompt to confirm or extend probation when it ends
- Send a WhatsApp wish on the day of a birthday or anniversary
- See staff split by department in a donut chart

Home (staff)

- See a greeting with their own designation, department and employee code
- Open "Complete my details" or "Update my details", or "Find a colleague"
- See how complete their personal details are, in per cent
- See how many of their documents HR has received (x of y)
- See how far their joining checklist has got
- See how long they have been with the business, or their joining date
- Get a warning listing the personal details they have not filled in
- See the next 5 open items on their joining checklist
- See their manager, their direct reports and colleagues who share the same manager, with a link to the org chart
- See celebrations this week, if switched on
- Read the HR policy note and email or WhatsApp the HR person with a ready greeting
- Fill in their personal details even before HR has added them to the directory

Directory (everyone; called People on the phone)

- Search by name, role, employee code or desk extension
- Filter by department and location (shown when there is more than one)
- Filter by status: current staff, joining, on notice, left or everyone (owner and managers only)
- Switch between Cards and List view

- Download the directory as a CSV file (owner and managers): code, name, work email, department, designation, location, employment type, reports to, joining date, status, last working day, extension, work phone and birthday
- Add a new employee (owner and managers)
- Show staff only current employees
- Hide desk extensions and work phones from staff when that setting is off; work email is always shown

Person page and My profile (everyone; some tabs only for the person and managers)

- See work details, reporting line (manager and direct reports) and birthday unless hidden, on the Overview tab (everyone)
- Keep a personal record: date of birth, blood group, personal mobile and email, home address, emergency contact name, relationship and number, and highest qualification, with a completeness bar (the person and managers)
- See each joining document as Received (with date and who received it), Pending or Optional (the person and managers)
- Tick and untick documents as received (managers only; staff can only view)
- View joining and exit checklists (the person and managers)
- Tick checklist items, add tasks with an owner and due date, and delete a checklist (managers)
- Keep private HR notes and add new ones (managers only)
- Let the person edit their own details and choose "Show my birthday (day and month only) to the team"
- Let the person add or change their own photo, cropped to a square, if photos are allowed
- Print an ID card or an employee record sheet (managers)
- Edit, start an exit, mark as left, withdraw an exit, or rejoin someone who left (managers)
- Confirm or extend probation, offered 30 days before it ends (managers)

Add or edit an employee (owner and managers)

- Enter name, work email (the address they sign in with, which cannot be changed later), employee code, employment type, department, designation, location, reports to, joining date, desk extension, work phone and birthday (month and day)
- Get the next free employee code suggested; duplicate codes are blocked
- Choose "Access to this tool": Staff or Manager
- Start the joining checklist straight away for a new person
- Delete a record (the app suggests starting an exit instead)

Exit and probation (owner and managers)

- Start an exit with the last working day (suggested from the notice period), reason, private note and an exit checklist
- Mark the person as on notice and file an Exit HR note automatically
- Confirm probation with an effective date, or extend it by a number of months
- File a Confirmation or Feedback HR note automatically when probation is confirmed or extended

Org chart (everyone)

- See a tree of who reports to whom
- See people who have not joined yet (owner and managers)
- See each manager and how many people report to them
- See headcount by department
- Get a warning listing people who report to no one (owner and managers)

- Still show people whose reporting line loops back on itself, at the top of the chart

Celebrations (everyone; called Wishes on the phone)

- See birthdays and work anniversaries month by month
- Send a ready WhatsApp wish for today or a future date, filled with the name, years and business name
- Remove the screen for everyone when both birthdays and anniversaries are switched off

Onboarding (owner and managers; called Joining on the phone)

- See counts for joining, leaving, overdue tasks and completed checklists
- Switch between Joining, Leaving and Completed checklists
- See every overdue task in one list
- See open tasks grouped by who owns them
- Start an exit for any person or add a new joiner from here
- See the number of overdue tasks on the menu

Documents (owner and managers; called Docs on the phone)

- See a grid of every current employee against every document
- Click a box to mark a document received; phones show a list instead
- Filter by everyone, something pending or complete
- See how many files are complete, how many copies are pending and which document is most often missing
- Download the document status as a CSV file
- Record only that a document was received; ID numbers are never stored

HR notes (owner and managers; called Notes on the phone)

- Search notes and filter by kind
- Add, edit and delete notes: about whom, kind, date and text
- See notes from the last 90 days by kind in a donut chart
- Download all notes as a CSV file

Sign-in and phone use (everyone)

- Sign in with Google or a code by email; records stay private to the business
- Show a "You're signed in, but not invited yet" screen, with the person's email, to anyone not yet added
- Use it on a phone with a bottom tab bar, cards instead of tables and one-column forms
- Show a clear message when a save fails instead of losing it quietly
- Refresh a screen's data when you come back to the browser tab

5. Reports, prints and downloads

Prints

- ID card, 54 × 86 mm, front and back: logo band, photo, name, designation, department, employee code and blood group on the front; emergency contact, return-to address and "Authorised signatory" on the back (the app warns if blood group or emergency contact is missing)
- Employee record sheet on letterhead with Employment, Personal and Documents tables and signature lines for the employee and HR
- Any print can be saved as a PDF from the browser's print window

Downloads

- Directory CSV
- Documents CSV
- HR notes CSV

WhatsApp

- Birthday and work anniversary wishes with a ready message (you pick the chat)
- Staff message to the HR person with a ready greeting
- WhatsApp opens with the message filled in; you press send yourself

Worked out for you

- Next employee code: the highest number with the code prefix plus 1, padded to the set number of digits
- Tenure (how long someone has been with the business)
- Probation end date: joining date plus probation months, or the extended date
- Headcount at each month end, with joiners and leavers
- Personal details completeness over 8 fields
- Checklist due dates from the joining or last working day, and overdue task counts

6. What you can change in the admin panel

No coding: every change shows in a live preview, and saving updates your live tool.

Business & look

- Change the business name, short name and city (printed on ID cards and record sheets)
- Set who staff go to for HR matters
- Upload the logo
- Pick the main colour; text contrast is adjusted automatically
- Choose the sidebar style (Light, Deep or Tinted), one of 8 typefaces and the corner style (Soft, Round or Sharp)

Directory

- Edit the lists of departments, designations, locations or branches, employment types and checklist task owners
- Set the employee code prefix (for example ARG-) and number of digits (1 to 8)
- Turn on or off "Show desk extensions and work phones to all staff"
- Turn on or off "Let staff add their own photo"

Joining checklist

- Set probation months (0 to 24; 0 turns probation reminders off)
- Write up to 40 joining steps, each with who does it and the due day counted from joining (90 days before to 365 days after)

Exit checklist

- Set the notice period in days (0 to 180)
- Edit the reasons for leaving

- Write the exit steps, each with who does it and the day counted from the last working day (180 days before to 90 days after)

Documents

- List up to 20 documents to collect, each with a name, a short code used as the column heading and a "Required from everyone" switch

Celebrations

- Turn on or off "Show birthdays to the team" and "Show work anniversaries to the team"
- Write the birthday wish and anniversary wish, using fill-ins for name, years and business

HR notes

- Set up to 12 kinds of note, each with a name and colour

Words & pictures

- Write the manager welcome line, staff welcome line, HR note to staff and privacy line
- Write the sign-in heading, text and quote
- Change the banner, sign-in and empty-list pictures, with alt text

Contact

- Set the HR email and WhatsApp number

How the panel works

- Open it from "Edit website" in the Questico console; no coding needed
- See every change in a live preview, on desktop or phone, with sample data
- Get a warning before saving if document short names or note kind names repeat, or if the joining checklist has no steps
- Change only the look, words, lists and rules here; employee records are entered inside the tool

7. Good to know

- Has no salary, payroll, leave or attendance features
- Does not store document files; documents are only ticked as received, and ID numbers are never recorded
- Has no e-signatures
- Sends no automatic reminders or messages; WhatsApp opens with the text filled in and you press send
- Staff can edit only their personal record, photo and birthday visibility, not their directory entry
- Only the owner can give or remove access to the tool
- Changes to the checklist templates apply to new joiners only
- A work email cannot be changed after the employee is added
- Renaming a document's short code clears the ticks in that column
- Keep one HR note kind named "Confirmation" and one named "Exit"; the app files these automatically
- Switching off both birthdays and anniversaries removes the Celebrations screen for everyone, managers included
- Someone viewing their own checklist cannot tick it; another manager or the owner does

Need help?

Write to contact@questico.site with your tool’s address and what you need.