Here's the **OS USER GUIDES** split into four separate documents for easier upload into your AI Hub.

OS USER GUIDES – Part 1: Core & Non-Core Staff Onboarding

Internal Staff Help Centre – ASI OS Onboarding

Welcome to the OS Onboarding. Choose the guide that fits the user type you are onboarding. Each section contains clear step-by-step instructions and tips for a smooth onboarding process.

Core & Non-Core Staff (End-to-End)

Staff Type Definitions

- **Core Staff**: Permanent employees with long-term roles, typically working across multiple projects or centrally for ASI.
- **Non-Core Staff**: Fixed-term or project-based employees assigned to specific roles or assignments for a defined duration.

⚠ Only P&T can manage this process.

Step 1: Issuing the Invitation

Responsible: P&T
- Go to **People Management > People Directory** - Click **Onboard a New Core/Non-Core User** - Fill the Invitation Form: - Name - Personal Email - Staff Type: Core / Non-Core - ASI Role - Location - Click **SUBMIT**

📧A link is emailed to the Core/Non-Core User (valid 24h).
🖍️If expired, P&T can resend via the user profile.

Step 2: Invitation Email

Responsible: Core/Non-Core User
- Open personal email
- Find email: **"Welcome to Adam Smith International: Onboarding Email"**
- Click the magic link → directed to onboarding page

Step 3: Entering Personal Information

Responsible: Core/Non-Core User

a. Personal Info - First/Last/Display Name - DOB, Marital Status, Gender - Nationality, Language - ID Type & Number (**Required**) - Travel/Health Insurance: Yes = upload required

b. Contact Info - Current & Permanent Address - City, State, Zip, Country - Phone Numbers - Email (pre-filled) - 🔗Check box if addresses match

c. Upload Documents - ID (Front & Back) OR Passport (**Mandatory**) - Profile Picture (Optional)

d. Create Signature - Draw or upload
- Update anytime
- Click **NEXT**

Step 4: Emergency & Health Info

Responsible: Core/Non-Core User
- **a. Emergency Contact** - Blood Group (**Required**) - **b. Medical Declaration** - Indicate health issues (If Yes, add details) - Doctor's Name + Contact (**Required**) - **c. Proof of Life** - Choose & answer a security question - **d. Dependents (Optional)** - Add names & relationships - **e. Next of Kin** - Name, Relationship, Contact Number - Click **NEXT**

Step 5: Upload Documents

Responsible: Core/Non-Core User

Required: - Academic Certificates - CV or Experience Letter

Optional: - Professional Certificates - Other Docs

Click **NEXT**

Step 6: Consent & References

Responsible: Core/Non-Core User

a. Consent Forms - Sign: - Background Check Consent - Data Privacy Notice - Use ＋ to expand, scroll, sign

b. References - Add two referees (unique emails): - Email, Org Contact (**Required**) - Position (Optional) - Click **NEXT**

Step 7: Review & Submit

Responsible: Core/Non-Core User
- Review info
- Click **Edit** if needed
- Click **Submit** when ready
📧Emails sent to referees + P&T

Step 8: RDC Checks

Responsible: P&T
- Go to **People Directory**
- Open the profile and click **RDC Checks**

- Run checks via RDC System
- If red flags:
- Clarify with Core/Non-Core
- Complete DD Form & send to Legal
- 🔗 Mark as Approved & upload report
- Only one check required
- Record approver details

🔗 https://grid.rdc.eu.com/wss/security/login.html

Step 9: Final Verification

Responsible: P&T
- Tick all onboarding verification boxes
🖍️ Once done, **Issue Contract** button appears

Step 10: Issue Contract

Responsible: P&T
- Search for Core/Non-Core User in **People Directory** - Click **Issue Contract** - Complete form: - Contract Template: choose appropriate Core/Non-Core template - Type: Permanent - Start Date, Line Manager - Location, Salary, Allowances, etc. - Optional: Send for Review → Toggle ON → Add reviewers → Save Draft → appears under **My Approvals > Contract Review** - Assign Signatory or Self-sign
- P&T assigns signatory or signs directly
- Line Manager signs after ASI Signatory (if applicable) 📧 Contract sent to ASI Signatory first, then Core/Non-Core User

Step 11: Signing the Contract

Responsible: Core/Non-Core User
- Open email: **"Sign Contract and Complete Your Onboarding"**
- Click the magic link
- Sign forms: - Ethics Declaration - Conflict of Interest - Expression of Wish - Add Bank Details - Review & sign contract
- Click **I Agree & Submit**
- 🔗 Save Microsoft login details!

Step 12: Finalising Onboarding

Responsible: Core/Non-Core User
- Select **Login with Microsoft 365**
- Setup Authenticator App
- Login with ASI email (primary), personal (backup)

📧 Notifications sent to P&T, Service Desk, Line Manager
🔗 Onboarding Complete!

Next Part: Part 2 – Associate Consultants (End-to-End)