People

Manager Walkthrough

Version 1.0

Last updated: 14th March 2018

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E: customerservices@peoplehr.com

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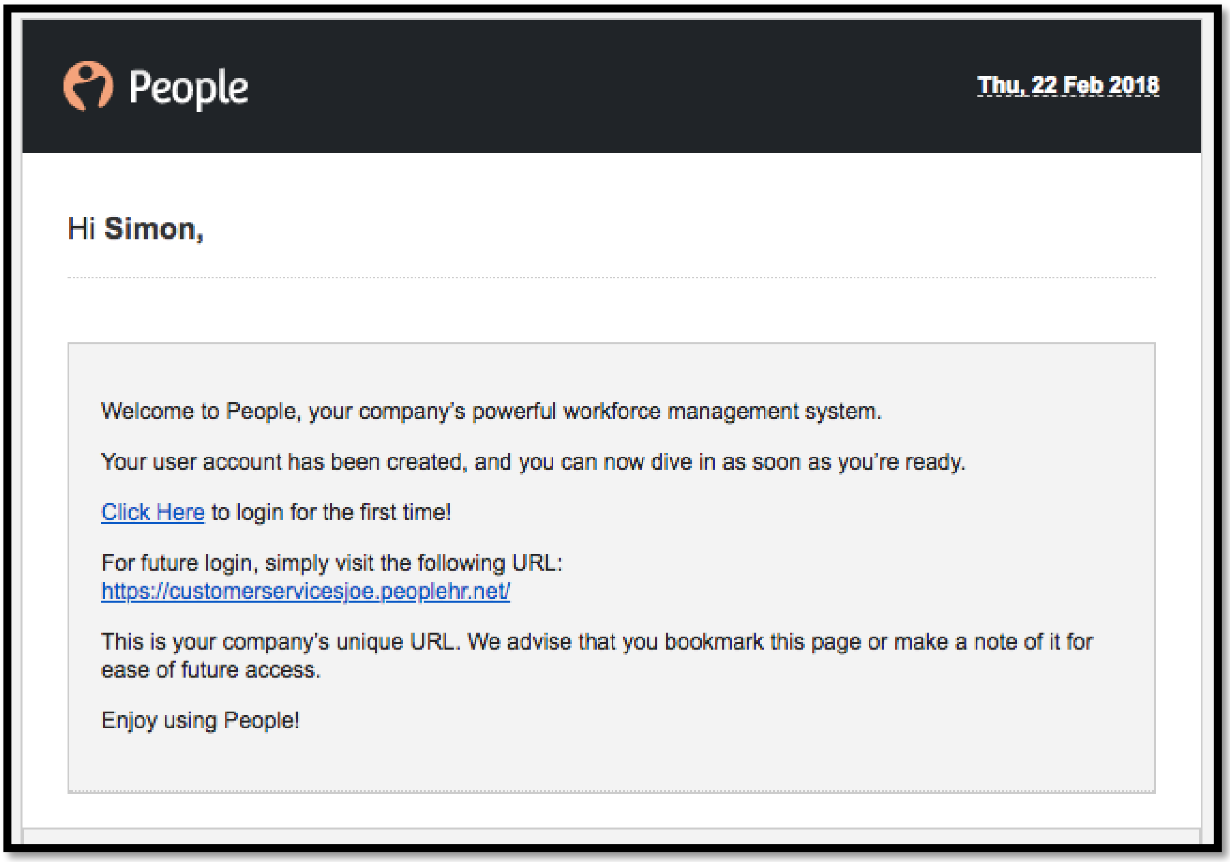
Welcome Email


People Thu, 22 Feb 2018

Hi **Simon,**

Welcome to People, your company's powerful workforce management system.

Your user account has been created, and you can now dive in as soon as you're ready.

Click Here to login for the first time!

For future login, simply visit the following URL:
https://customerservicesjoe.peoplehr.net/

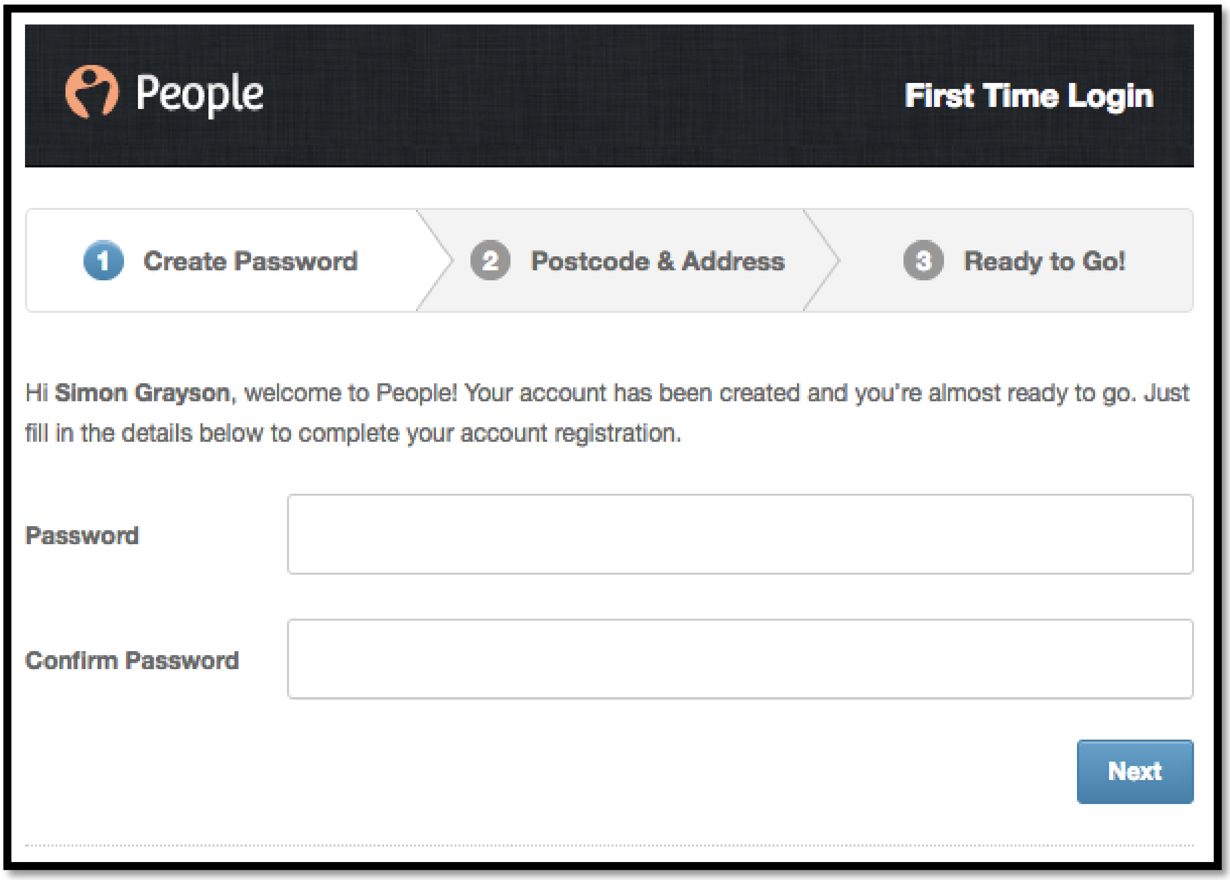
This is your company's unique URL. We advise that you bookmark this page or make a note of it for ease of future access.

Enjoy using People!

When your company launch your new HR system, the first thing you will receive is a welcome email. From this you can click to log in for the first time and create a password.

It also contains your PeopleHR URL for future access

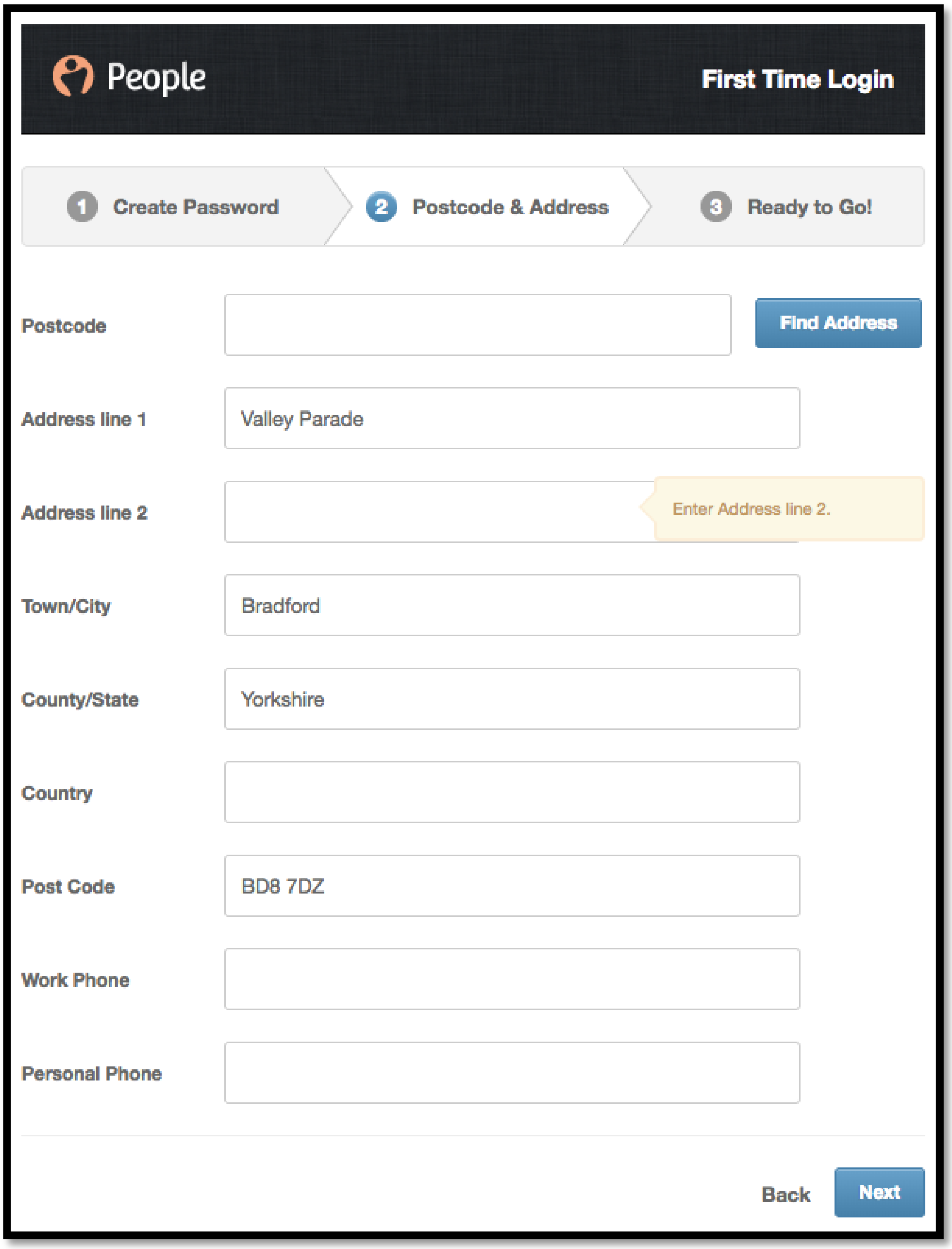
Creating a Password



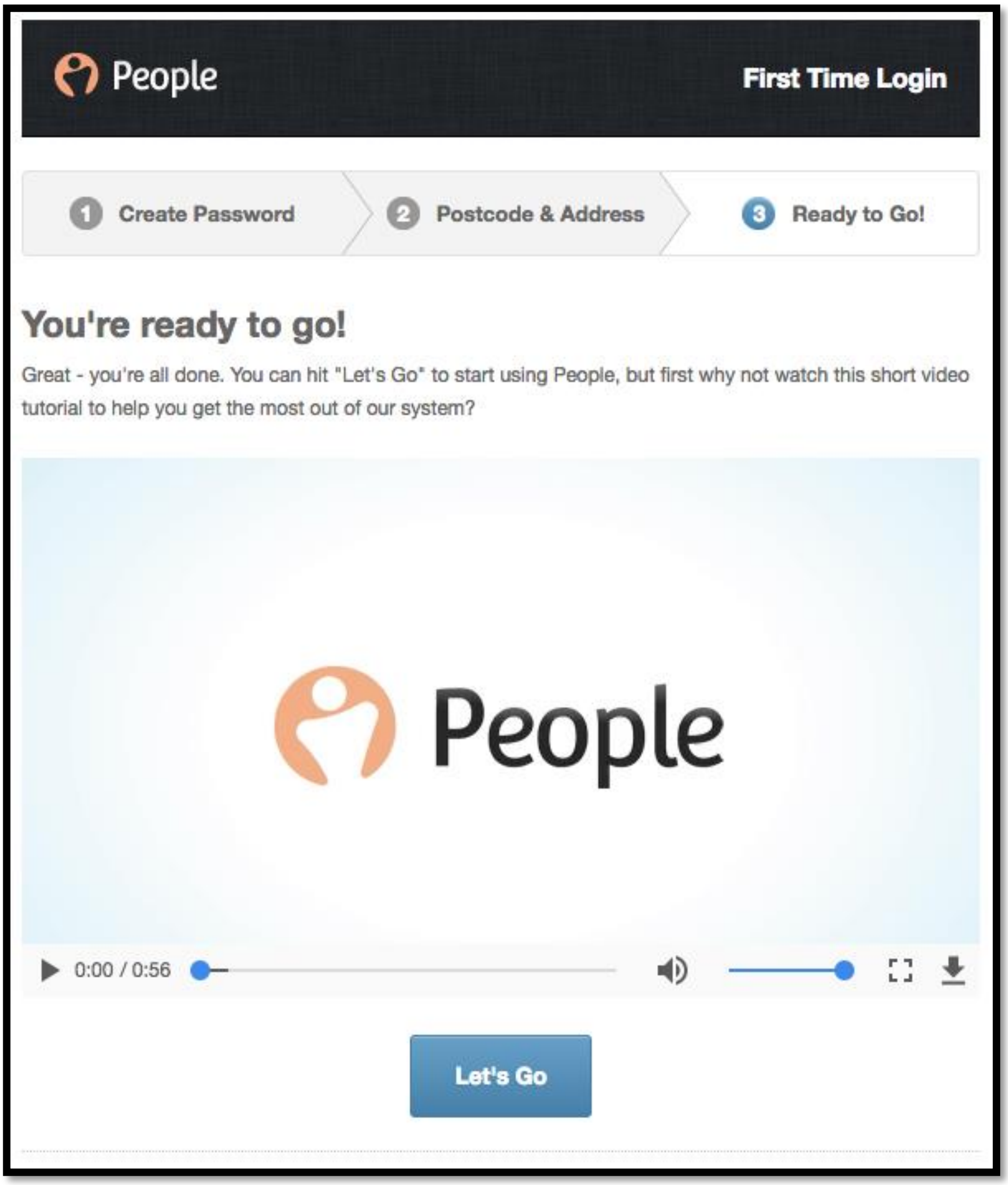
You will now need to create a password for your login credentials. The password will need to be at least 8 characters long and must contain at least one capital letter, one small letter, one symbol and one number.

Confirming your Details

After you create your password, you will be asked to confirm your personal details. From here you can amend these if necessary.



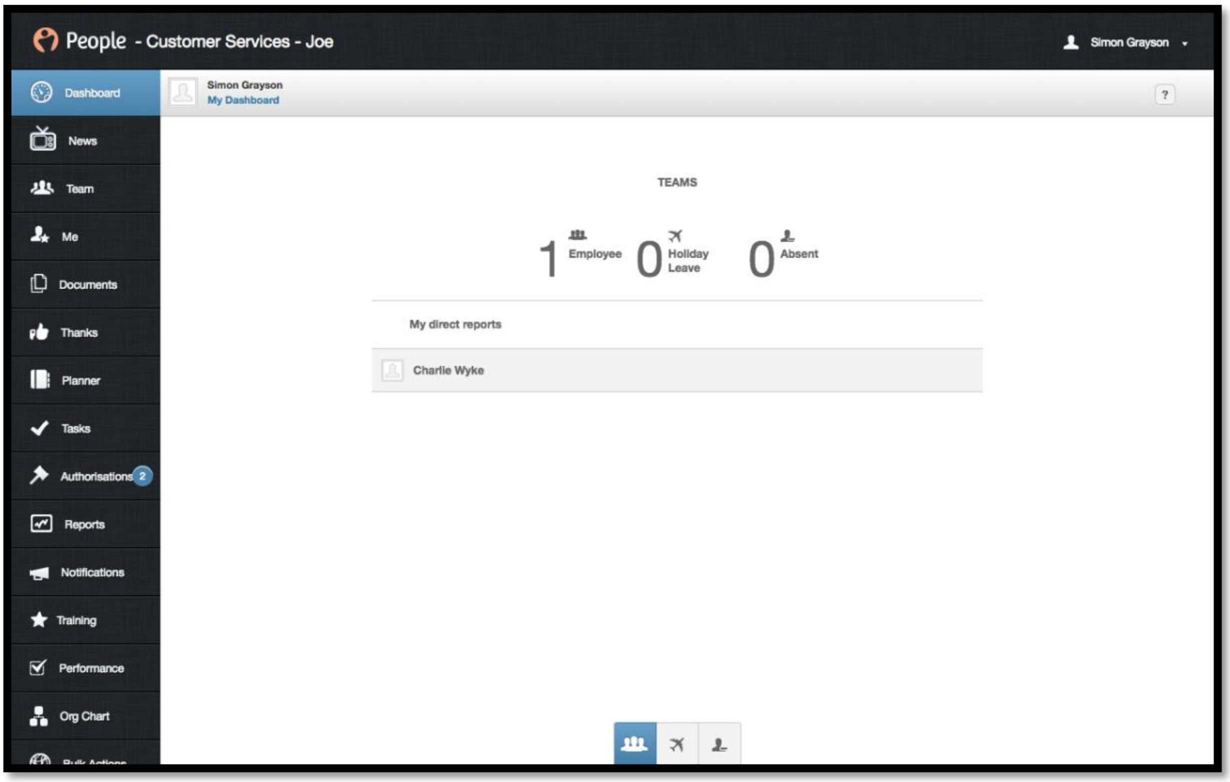
You're Ready to Go



You are now ready to go. There is a short tutorial video to give you some insight into the system, but once you are ready press Let's Go and you will now log into your People HR system.

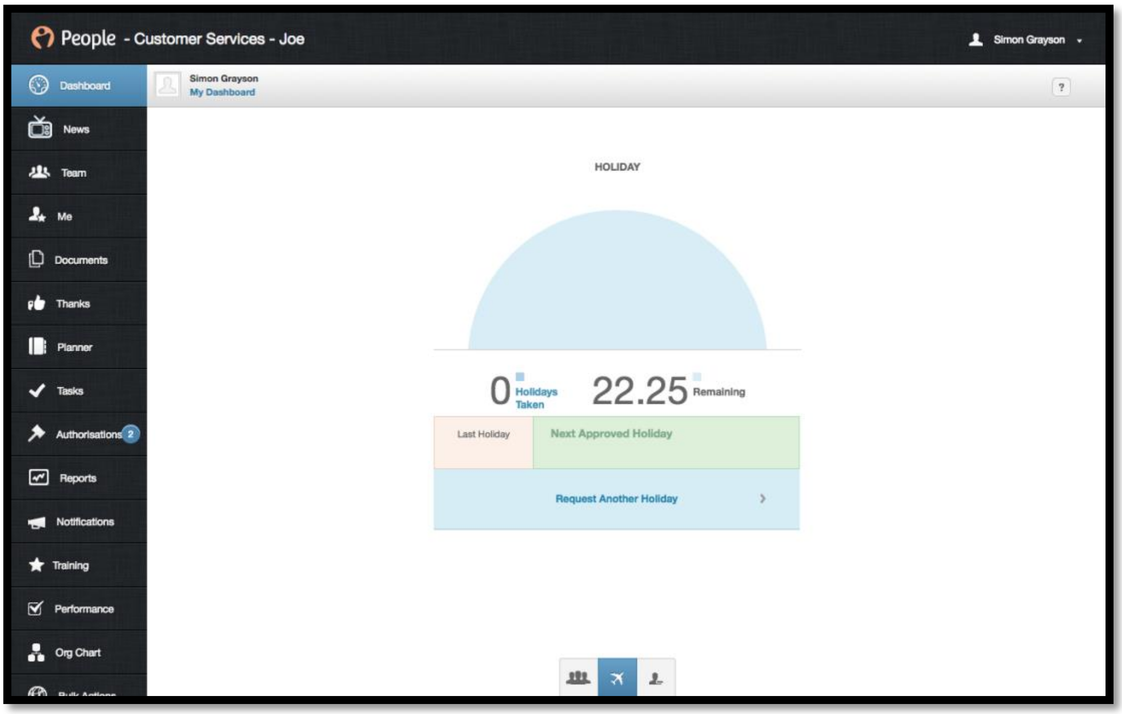
Dashboard

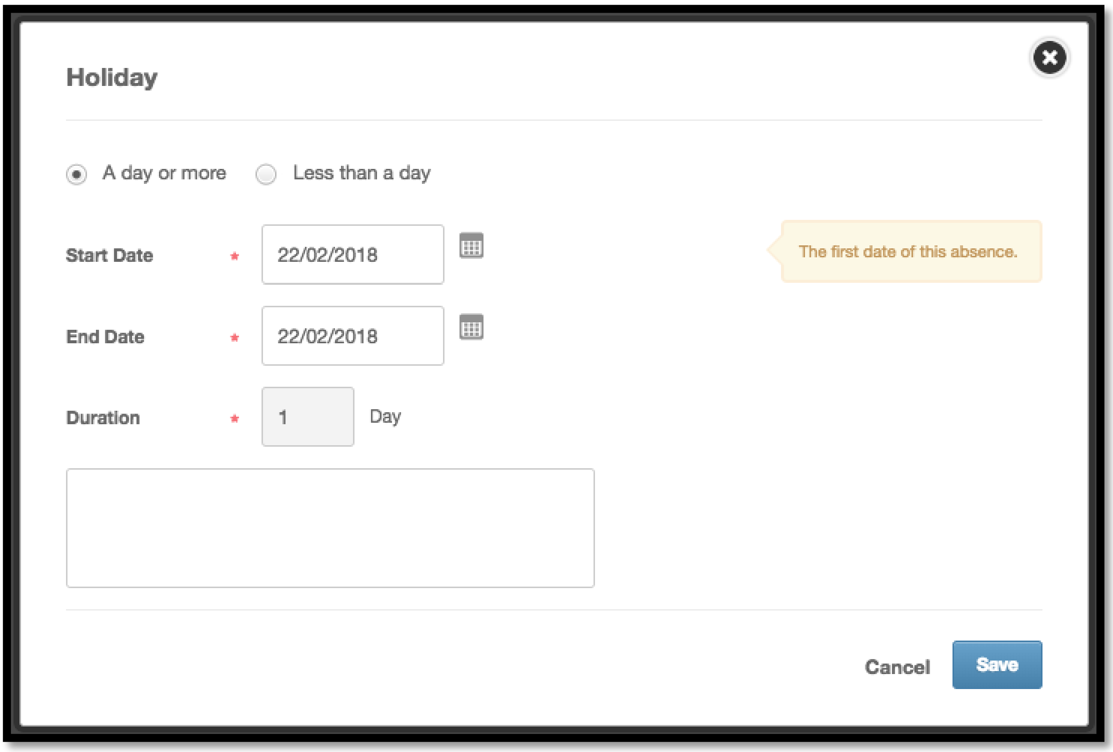
The first tab you will see on your is your Team tab. From your Team tab, you can see your reports and who is on holiday and/or off sick each day.



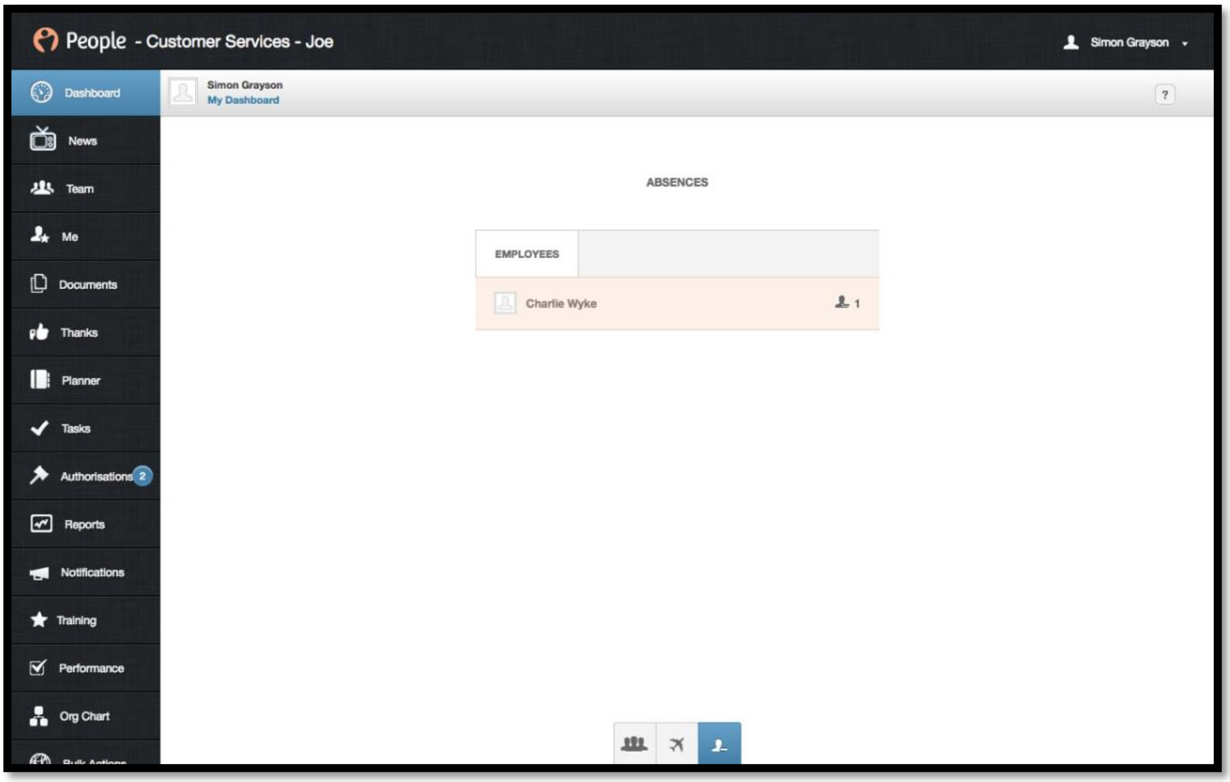
At the bottom of your dashboard, there are three buttons. Each one will open a different tab on your dashboard. From the second tab you are able to book annual leave. Click on the Request Another Holiday and it will allow you to book your requested days.

You can then select your required days, whether it's a day or more or less than a day and add any comments.





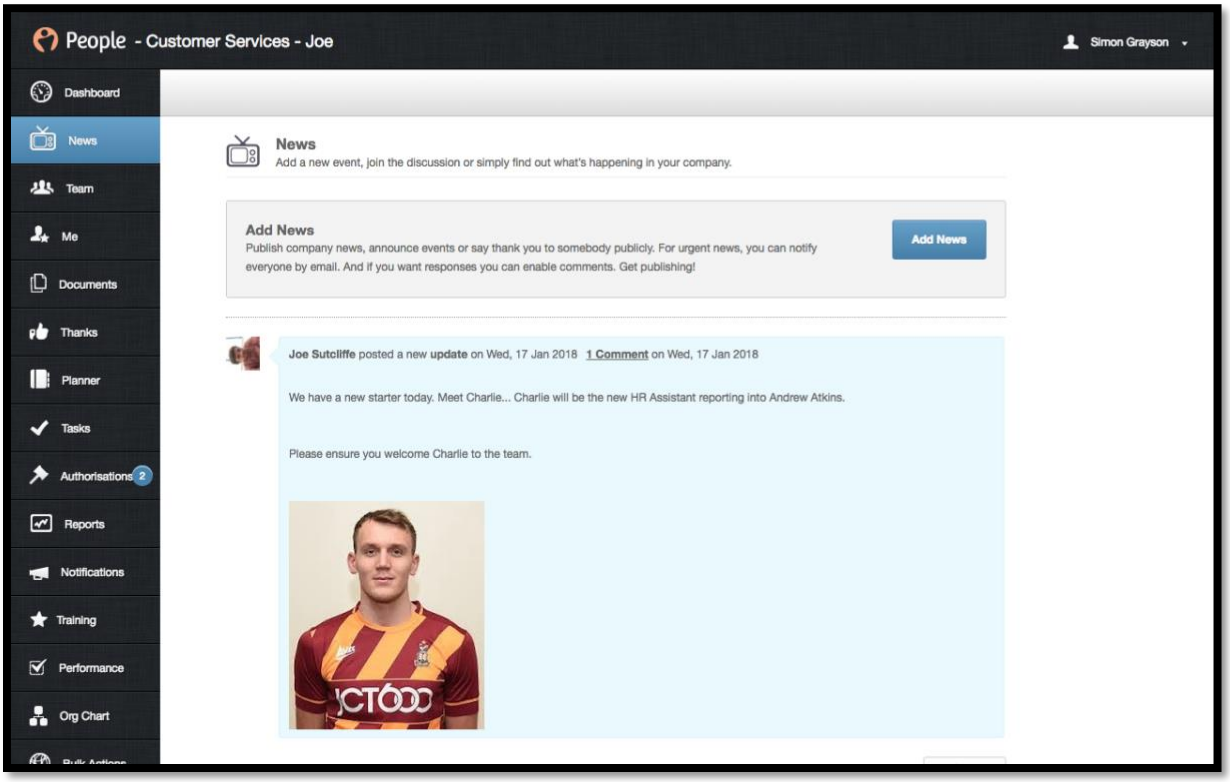
The final tab within your dashboard allows you to view the absences league table for your team. This will show the total number of days sickness for a rolling 12-month period for your employees.


People - Customer Services - Joe
Simon Grayson
Dashboard
News
Team
Me
Documents
Thanks
Planner
Tasks
Authorisations 2
Reports
Notifications
Training
Performance
Org Chart
Simon Grayson
My Dashboard
ABSENCES
EMPLOYEES
Charlie Wyke
1

News

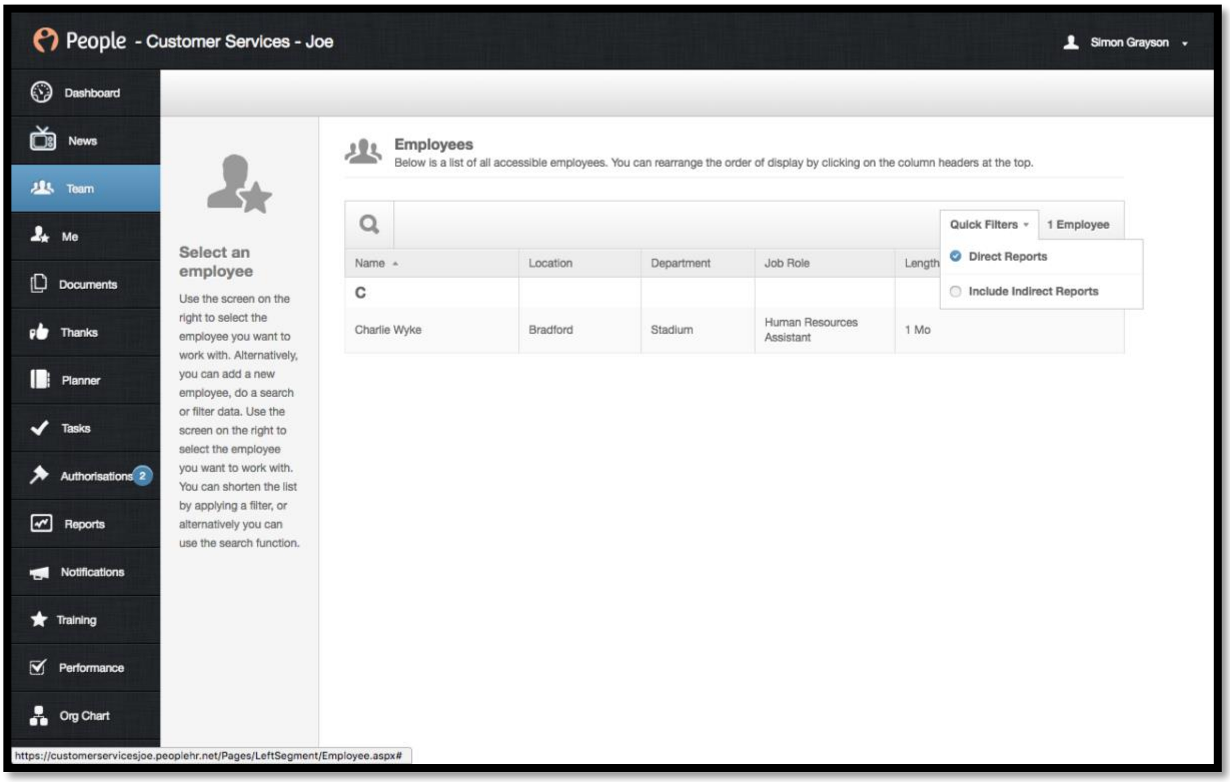
Your system administrators may have enabled a news feed within the system. This will show any relevant news published to your department, location or company. You may receive an email when important news has been produced and you may be allowed to comment on the news.

You may have been granted an option to be able to add your own news to the system. From here, you can select the Add News button and submit your news.



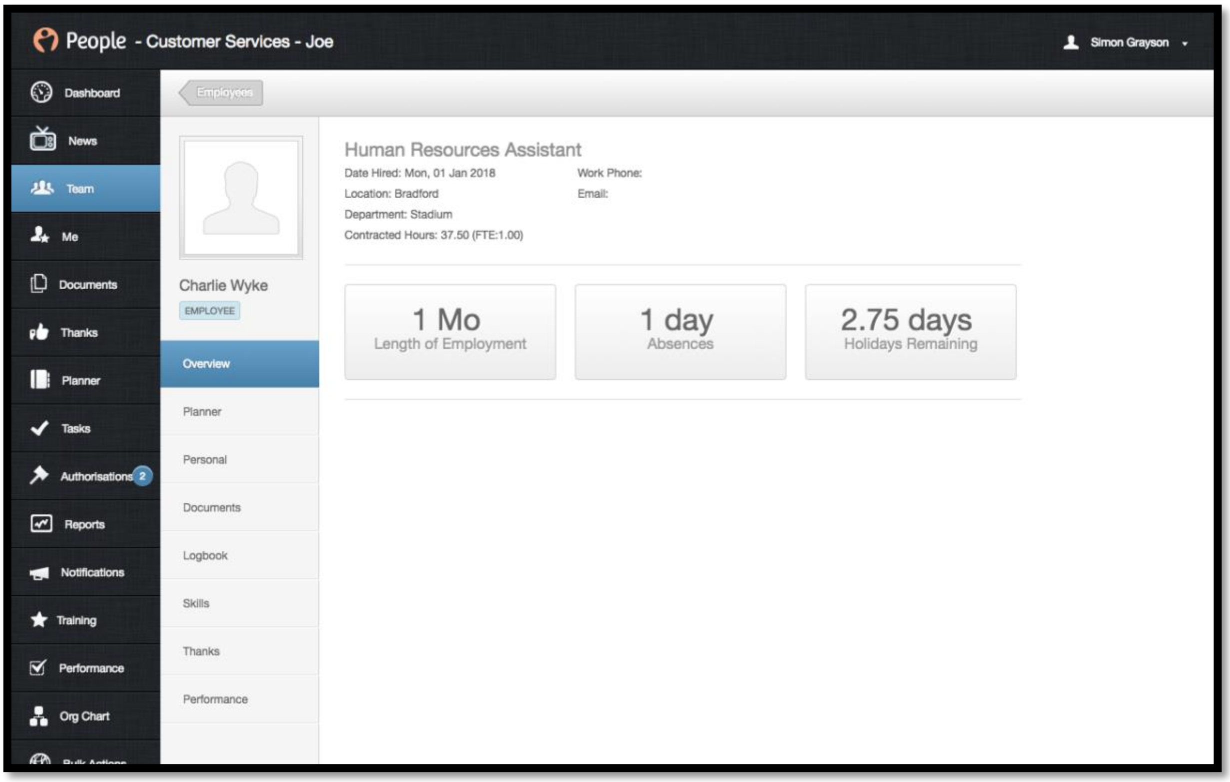
Team

As a manager, you will have access to a team tab. By entering this tab, you can see all of your direct reports. If your direct reports also have employees reporting into them, you will have a quick filter in the top right-hand corner of your screen where you can include indirect reports.



Team - Overview

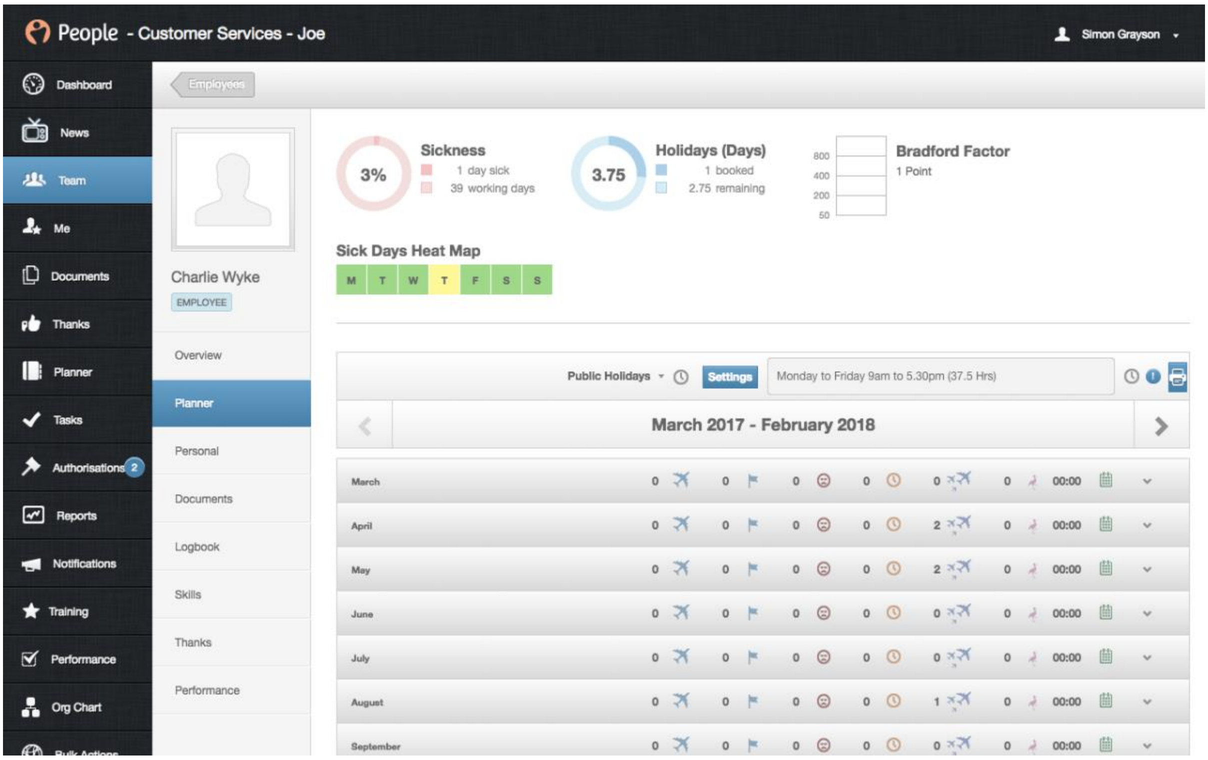
If you click an employee, you can enter their record. From their record, you are able to view their own personal tabs. The first tab you can see is the Overview. This will show a few basic details of the employee.



Team Planner

Within their Planner, you can view their attendance information. You will be able to see their sickness percentage, annual leave entitlement, Bradford Factor score and Sick Days Heat Map.

You are also able to book holidays and other events and enter sickness and lateness on their behalf.

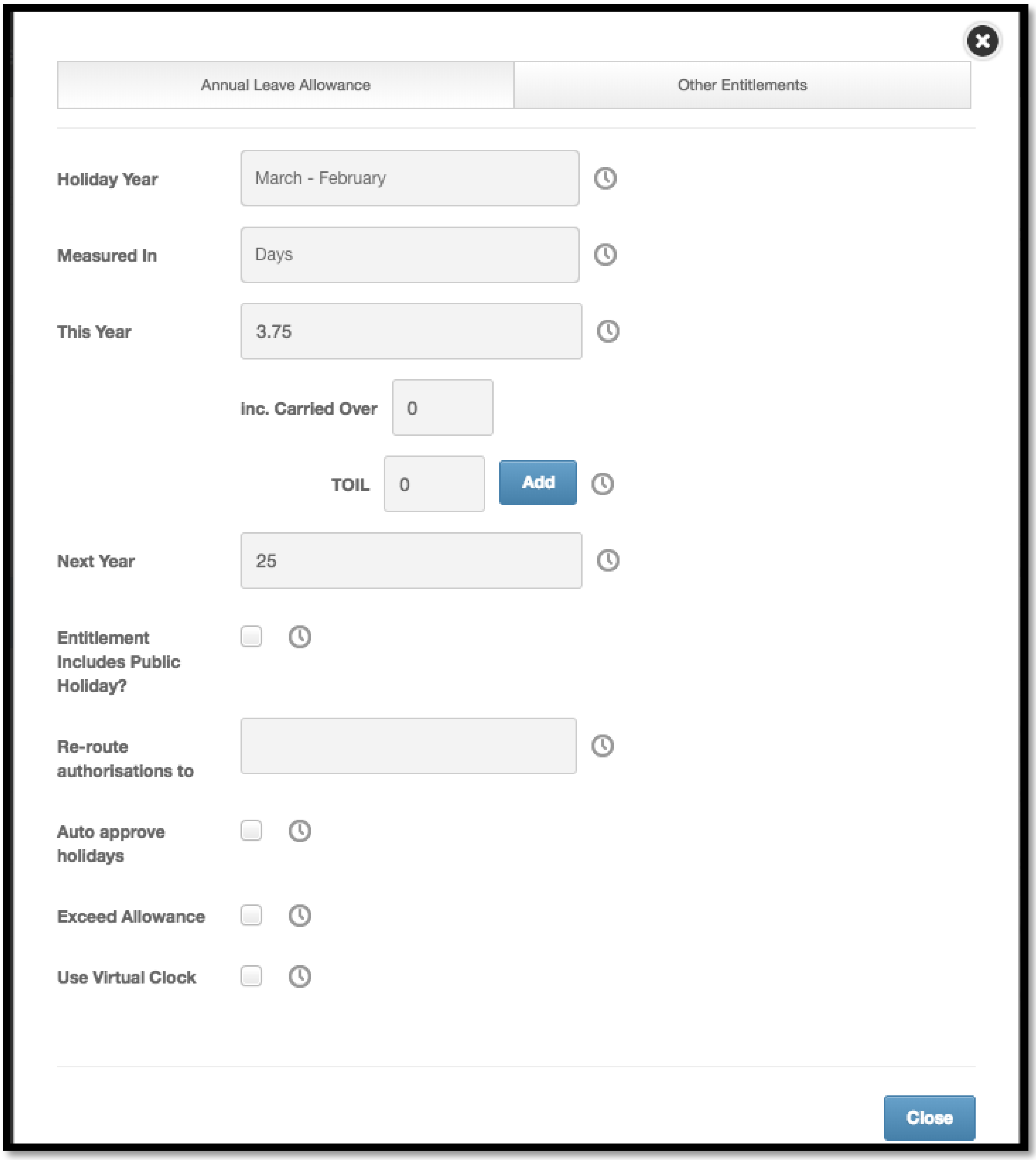


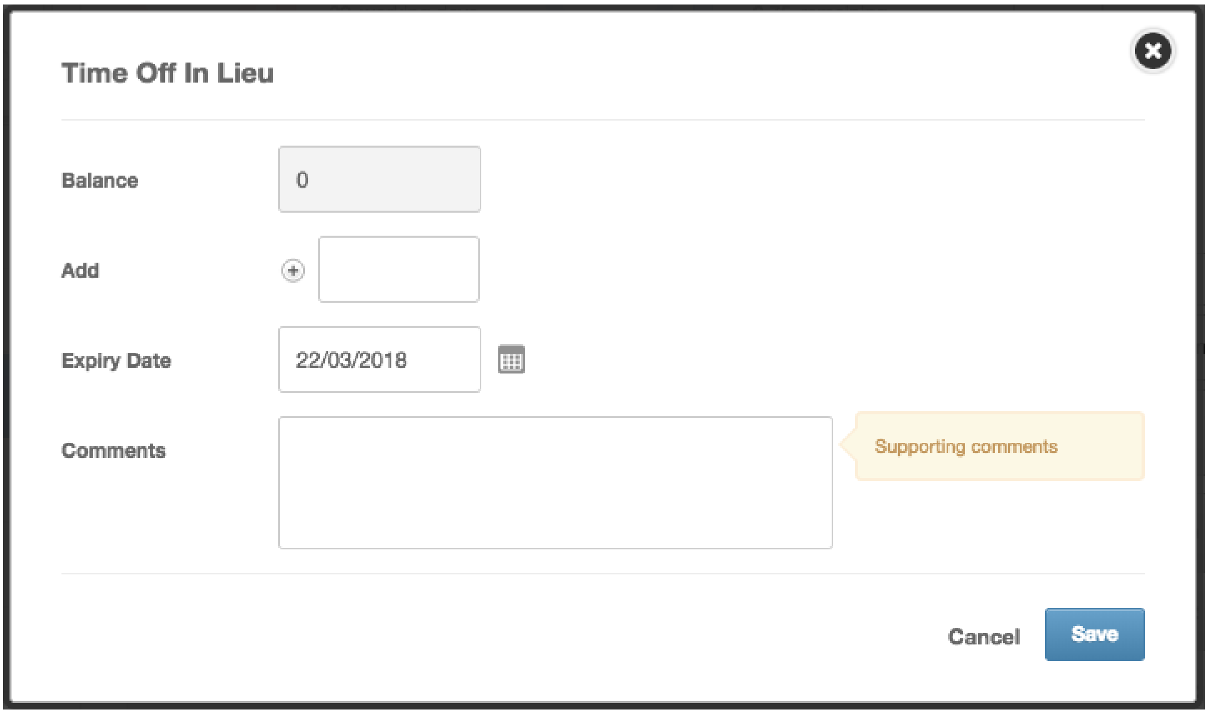
People

Settings and TOIL

Underneath their data, you can also access the employee's individual holiday settings. Depending on your company rules, you may also need to add TOIL (Time Off in Lieu) within here.

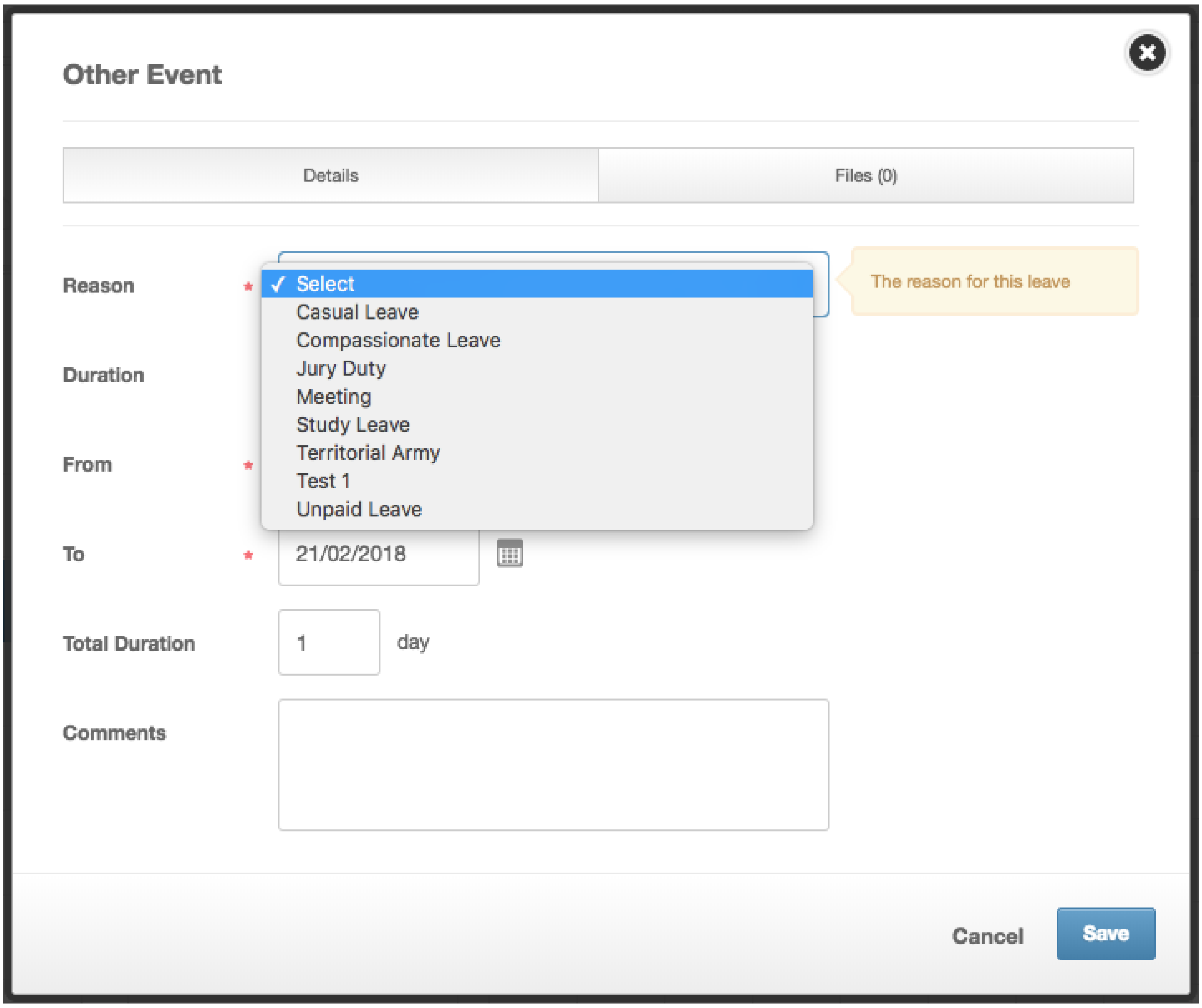
Click the Add button next to their TOIL allowance and you can add the required Time Off in Lieu. You can also enter an expiry date and any comments.




Time Off In Lieu
Balance
0
Add
Expiry Date
22/03/2018
Comments
Supporting comments
Cancel
Save

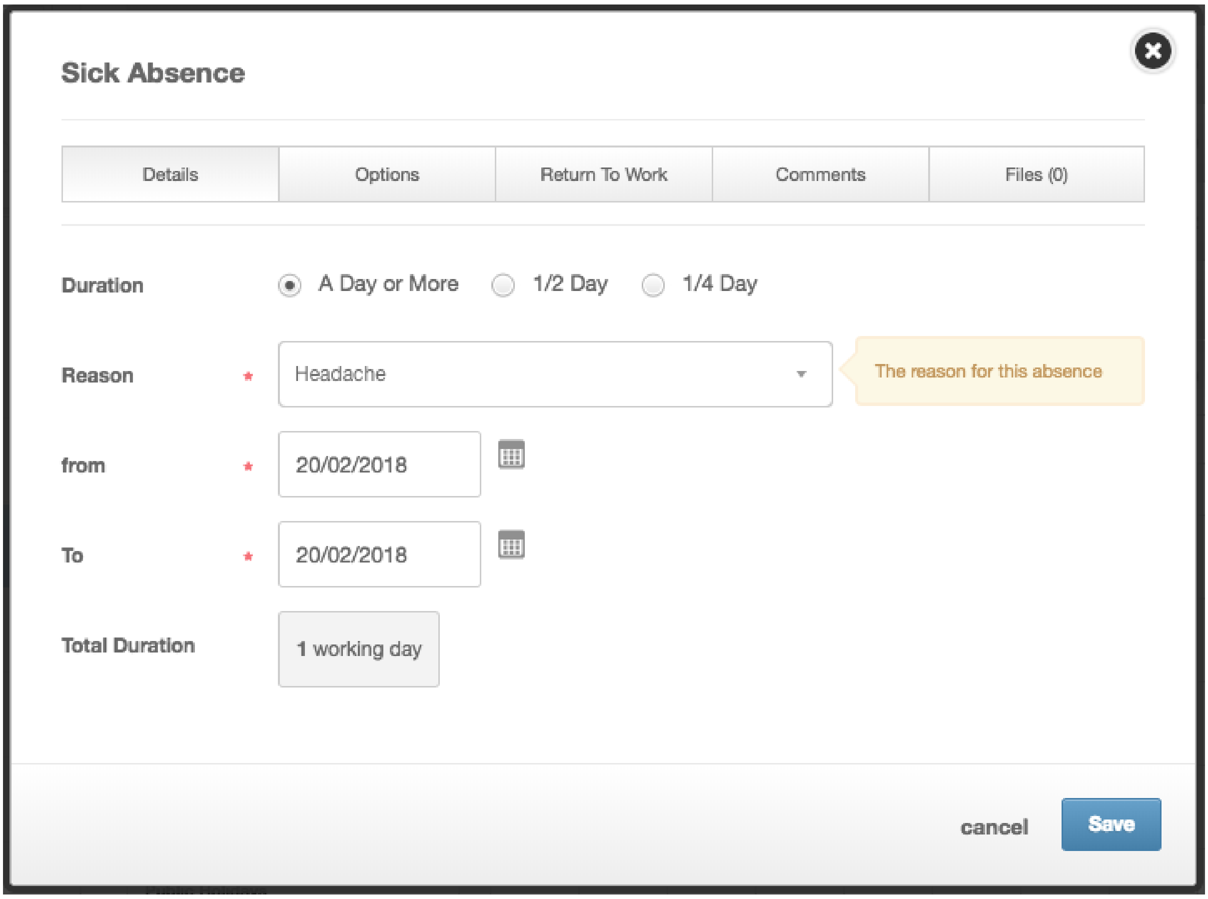
Adding Annual and Other Leave

To book annual leave or other leave on behalf of the employee, click on the plus on the corresponding row and date. Annual leave can be booked for the employee as within your dashboard. To book other leave, you will need to select the relevant reason from the dropdown, enter the from and to dates and any comments. You can also add files into the second tab.



Entering a Sickness

An employee is unable to enter/request their own sickness and lateness. Therefore, you may be required to input this on their behalf. To enter a sickness, enter the relevant row and date and click the plus. You will then enter the reason and the date of the sickness.



Upon the return of the employee, you may need to add information such as a Back to Work Interview or a Self-Certification (in the options). The employee may also need to fill in a return to work, in this case there is a section for yourself to fill out.

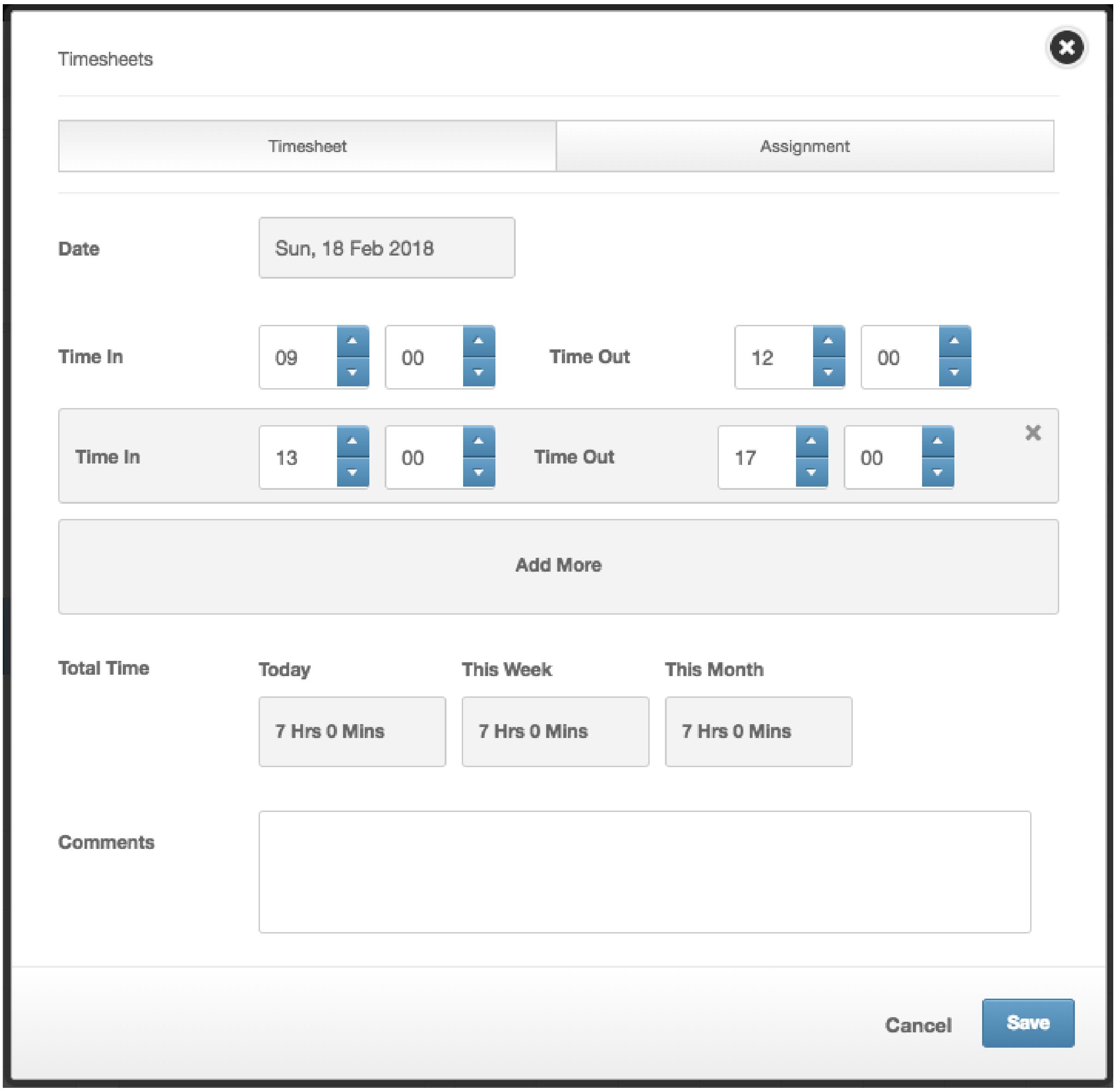
You can also add files in the final tab and you can also enter any information in the Comments tab. Please be aware that the employee can see these comments.

Late

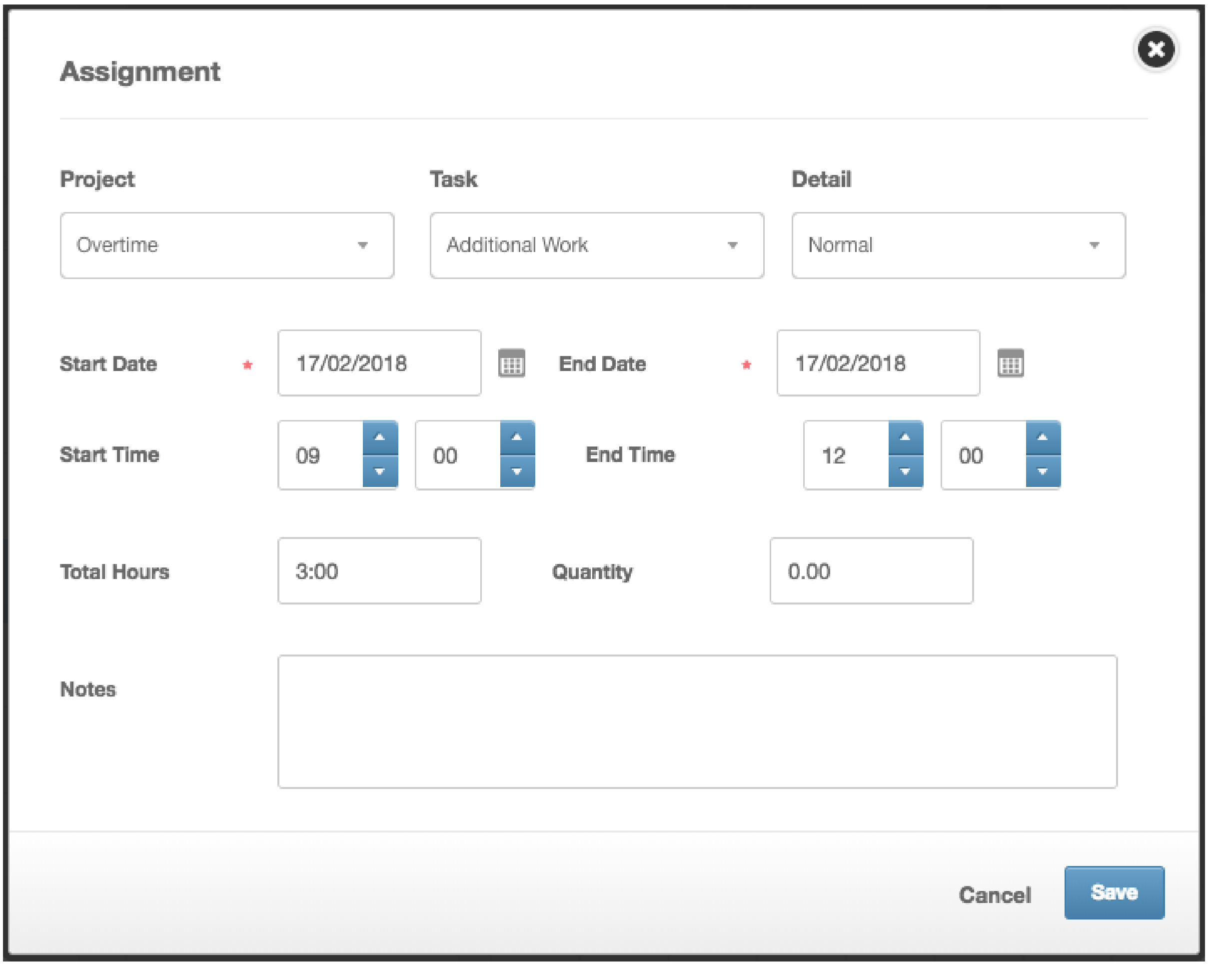
You are also able to log lateness against the employee if required. By clicking on the plus in the relevant date, you can enter the lateness in hours and minutes and enter any comments.

Timesheets/Assignments

Finally, in their planner, you are able to record timesheets and/or assignments on their behalf. The timesheets option allows you to clock the employee in and out.

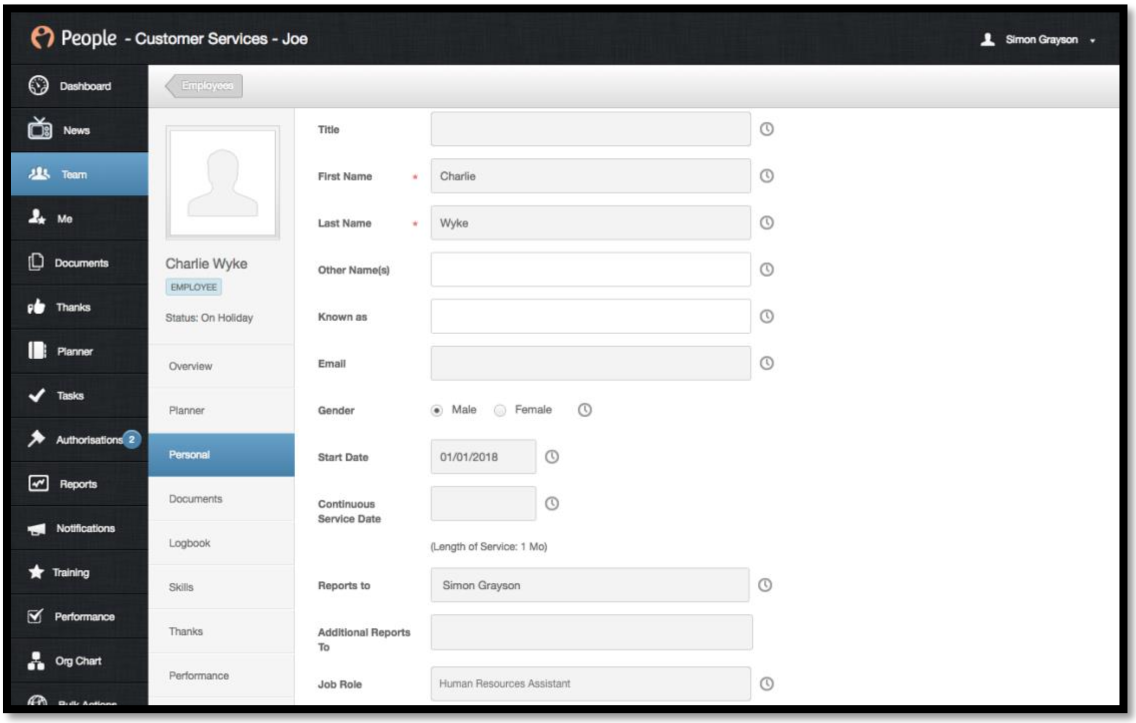


Whereas with an assignment you can log times against particular projects, tasks and details.


Assignment
Project
Overtime
Task
Additional Work
Detail
Normal
Start Date *
17/02/2018
End Date *
17/02/2018
Start Time
09
00
End Time
12
00
Total Hours
3:00
Quantity
0.00
Notes
Cancel
Save

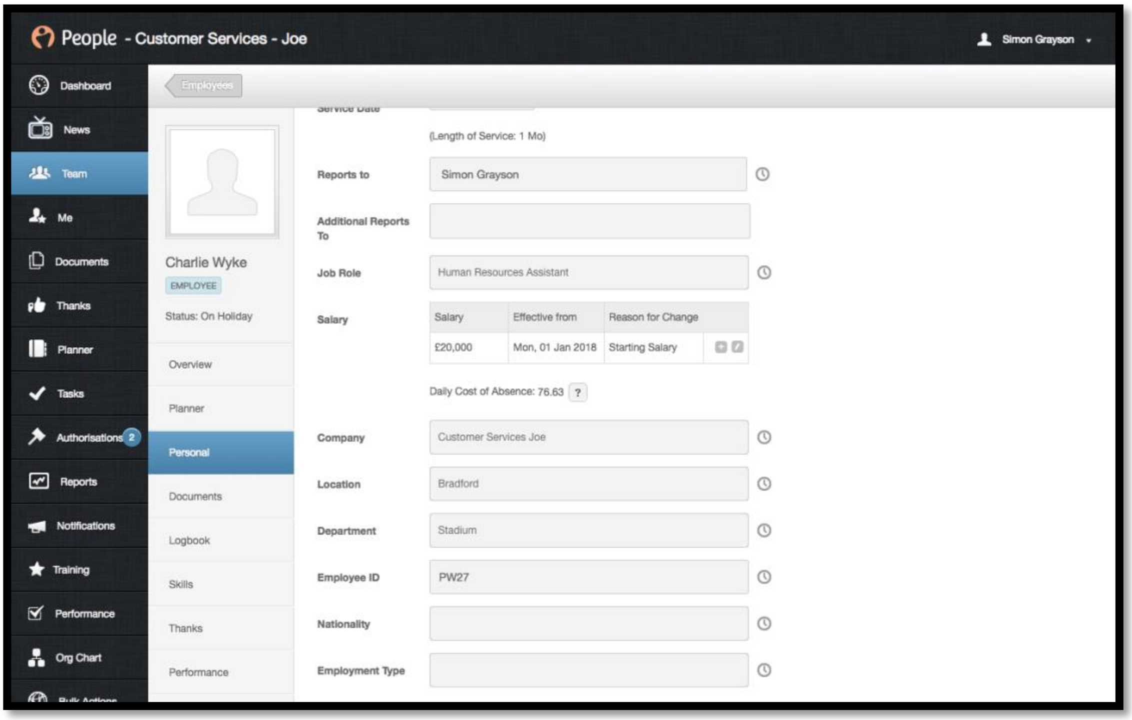
Team – Personal

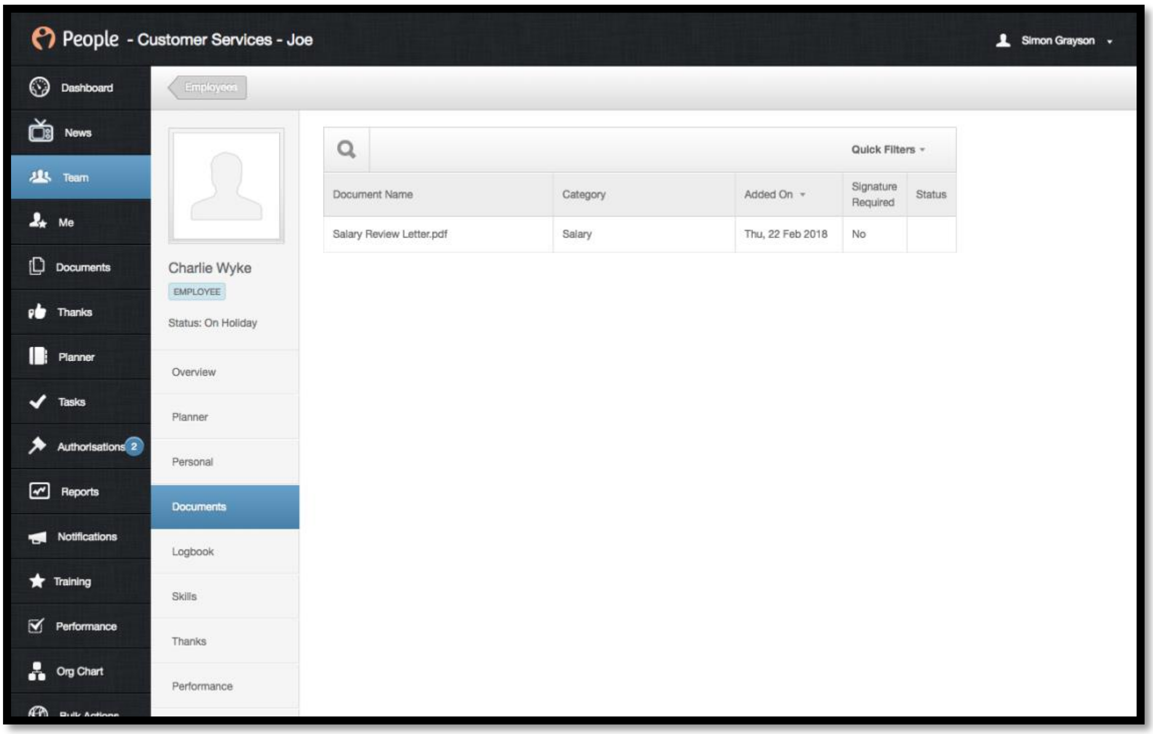
In the employee's personal tab, you can view their personal and job details. You are unable to amend this detail, you can view their information.



Team - Documents

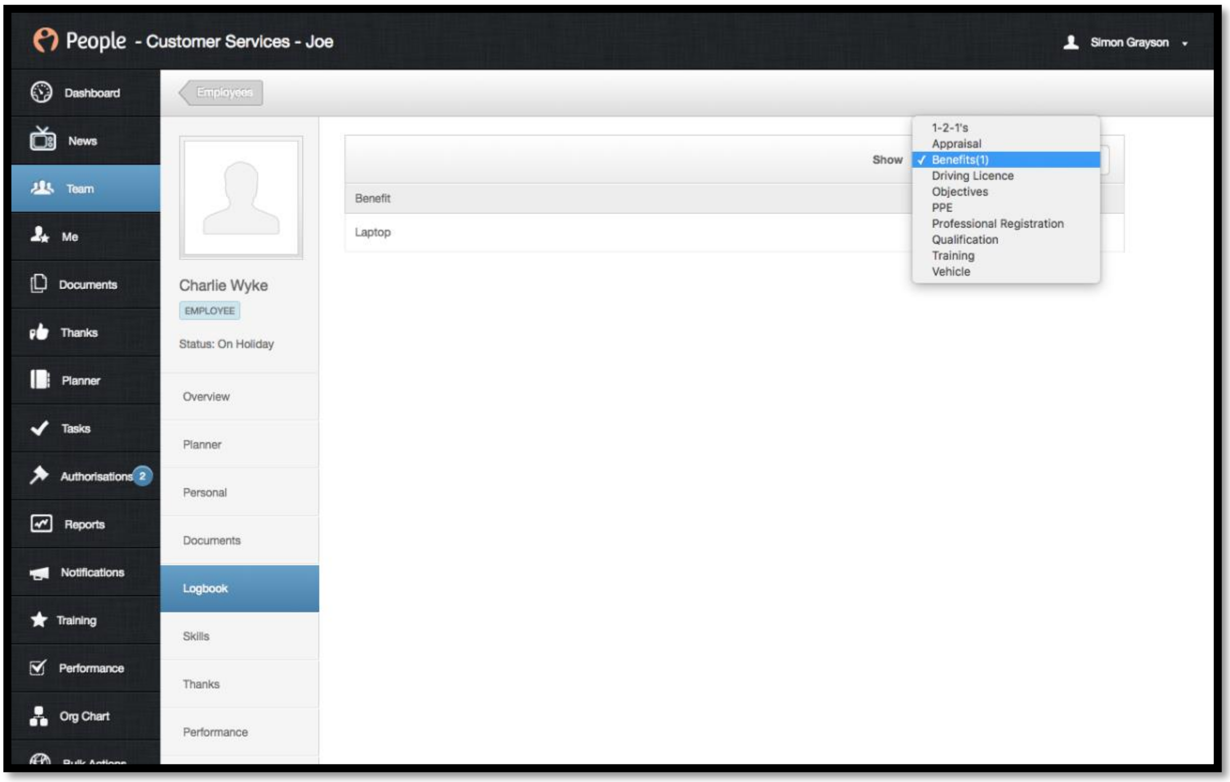
Within their record, the employee will have a documents tab. You may be able to see certain documents from here if you have been granted access. You may also, in certain circumstances, be able to add documents in here.





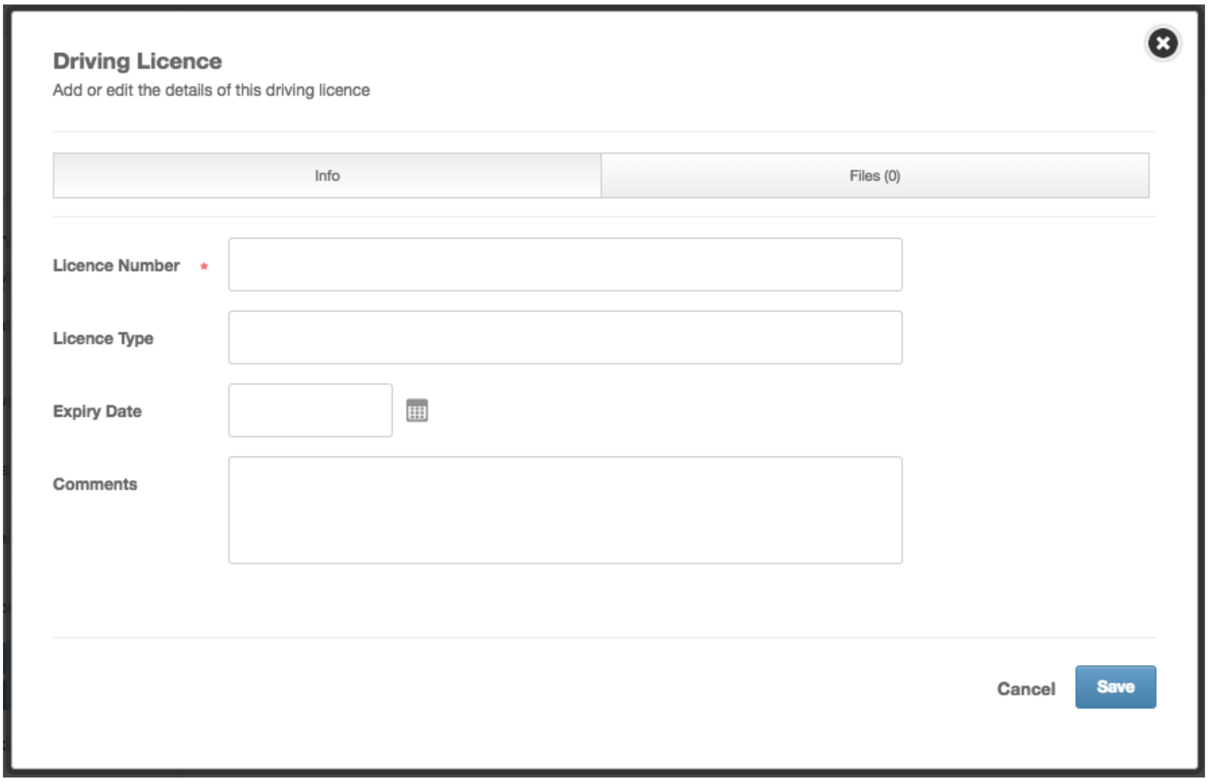
Team – Logbook

Under the Logbook tab, your HR team may wish to use this tab to store additional information against their record. Under the dropdown in the top right-hand corner, you may see several logbooks.



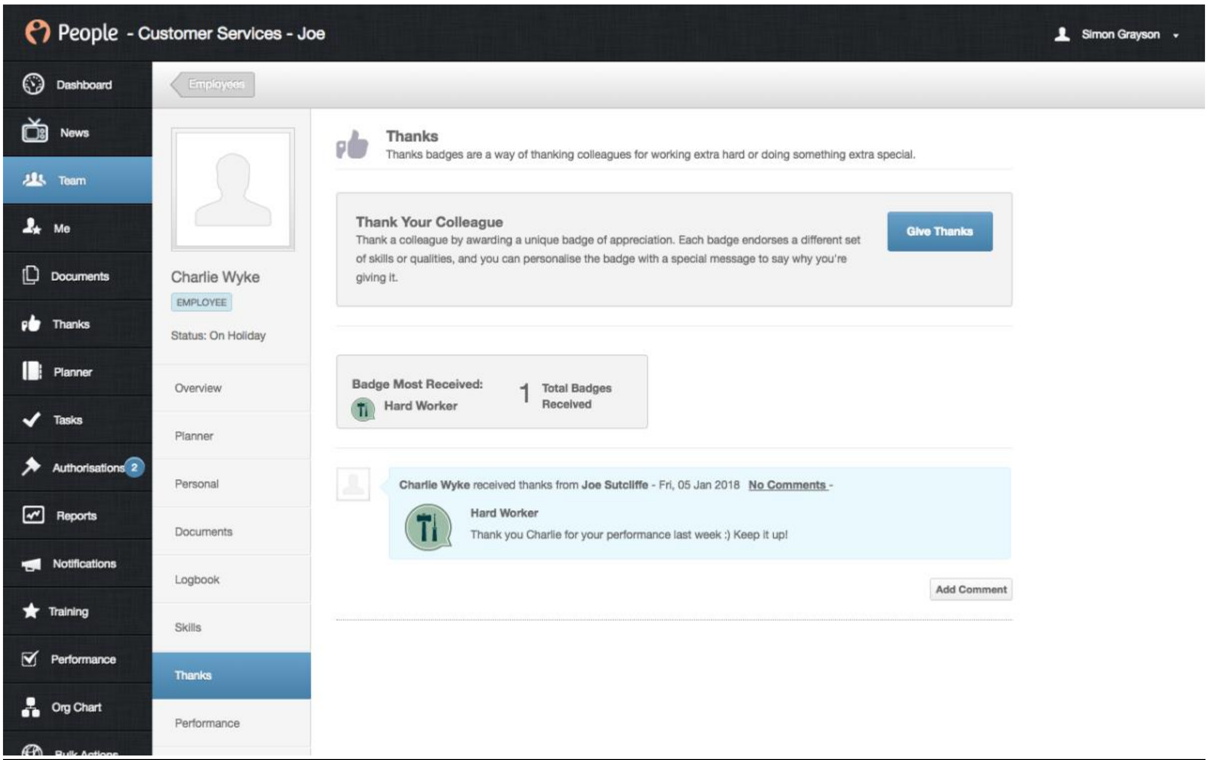
Some of these logbooks you may be able to fill out yourself, whereas others may only available for your HR team to record the detail. Your employee also may also be able to fill out some of their own logbooks.

If you see a Plus in the top left-hand corner of the logbook screens, you are able to add that type of logbook. You can then add the information required in the logbook and hit Save to record the data.

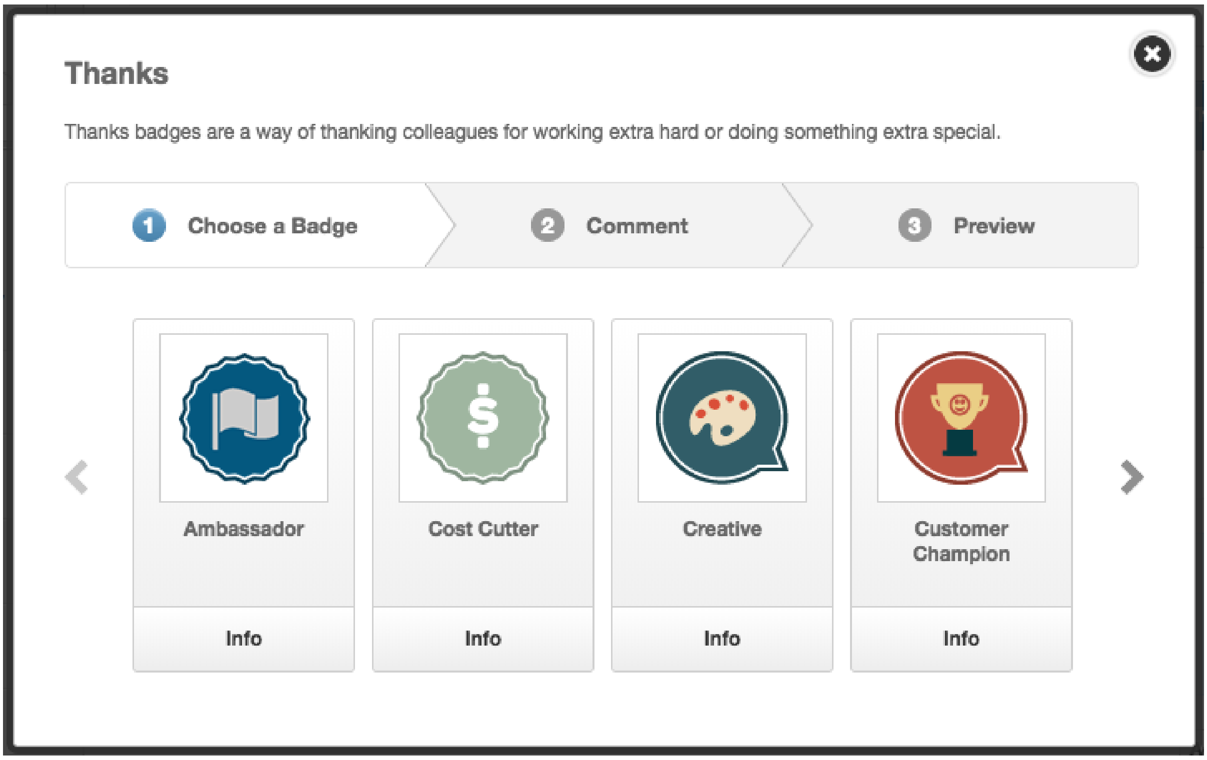

Driving Licence
Add or edit the details of this driving licence
Info
Files (0)
Licence Number *
Licence Type
Expiry Date
Comments
Cancel
Save

Team – Skills and Thanks

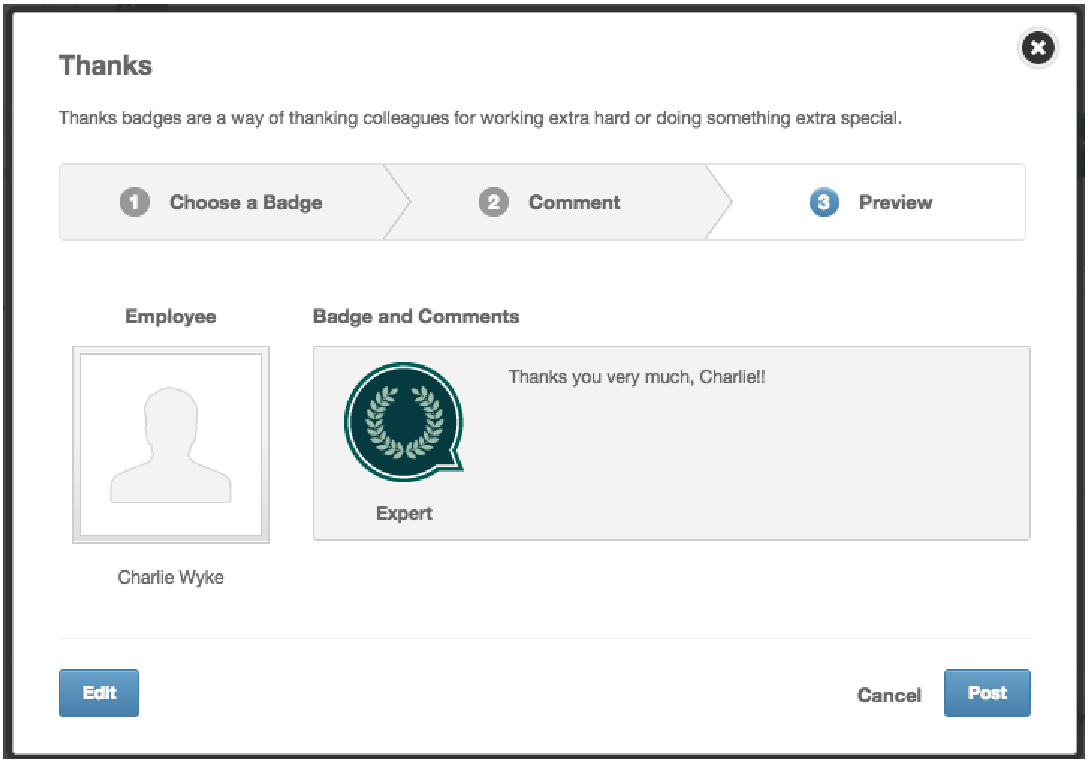
The Thanks tab can be used to show appreciation towards your employee in the form of a thanks badge.



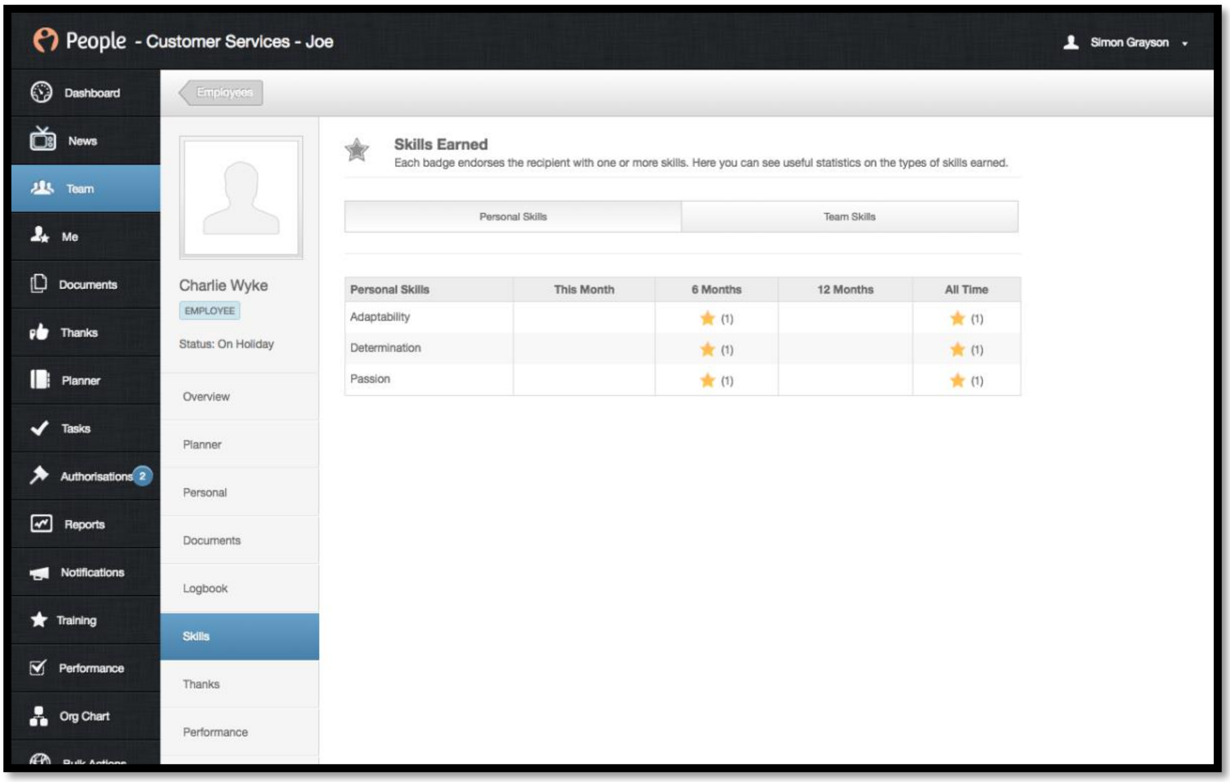
By pressing the Give Thanks option, you are able to select the appropriate badge you wish to grant.



Once you select the badge, enter some comments and then you can preview it and post it to their wall.



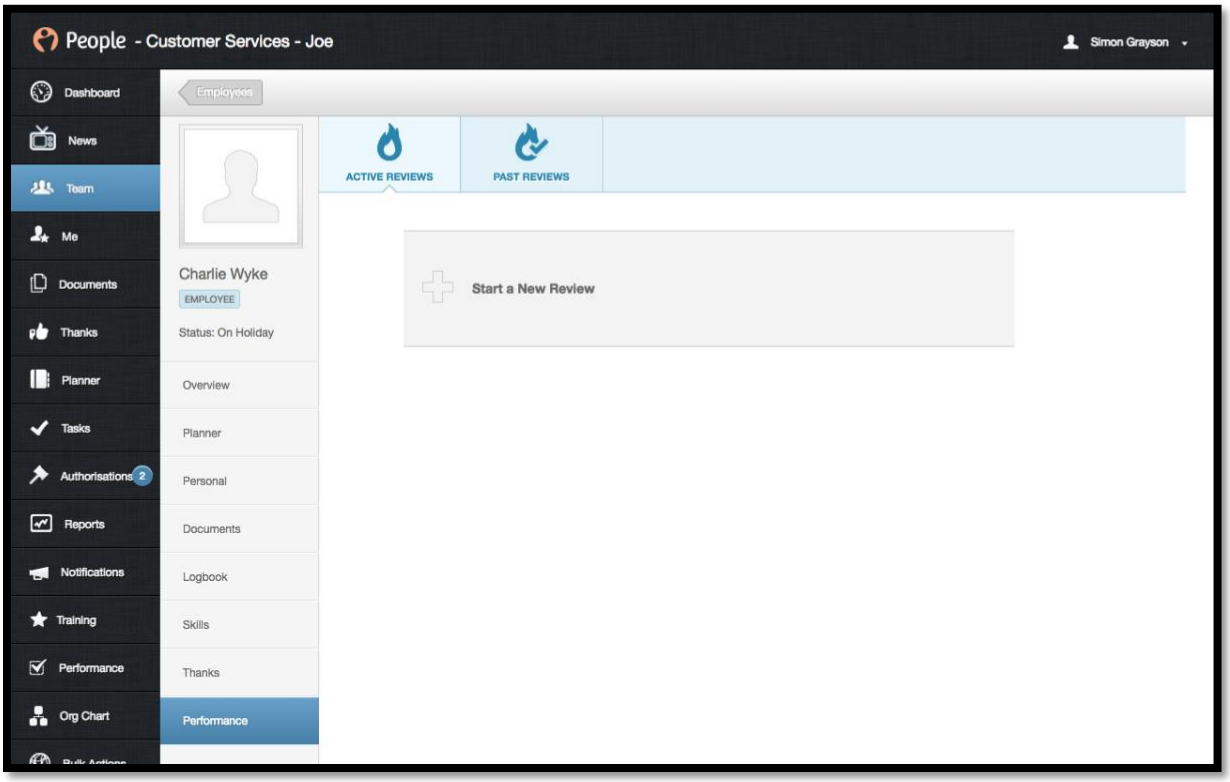
Each thanks badge will link to a particular set of skills. From the Skills tab, you are able to view which Skill points you have received.


People - Customer Services - Joe
Simon Grayson
Dashboard
News
Team
Me
Documents
Thanks
Planner
Tasks
Authorisations 2
Reports
Notifications
Training
Performance
Org Chart
Employees
Charlie Wyke
EMPLOYEE
Status: On Holiday
Overview
Planner
Personal
Documents
Logbook
Skills
Thanks
Performance
Skills Earned
Each badge endorses the recipient with one or more skills. Here you can see useful statistics on the types of skills earned.
Personal Skills
Team Skills
Personal Skills
This Month
6 Months
12 Months
All Time
Adaptability
(1)
(1)
Determination
(1)
(1)
Passion
(1)
(1)

Team – Performance

Your company may have a performance module. From here you can undertake performance reviews your employee.

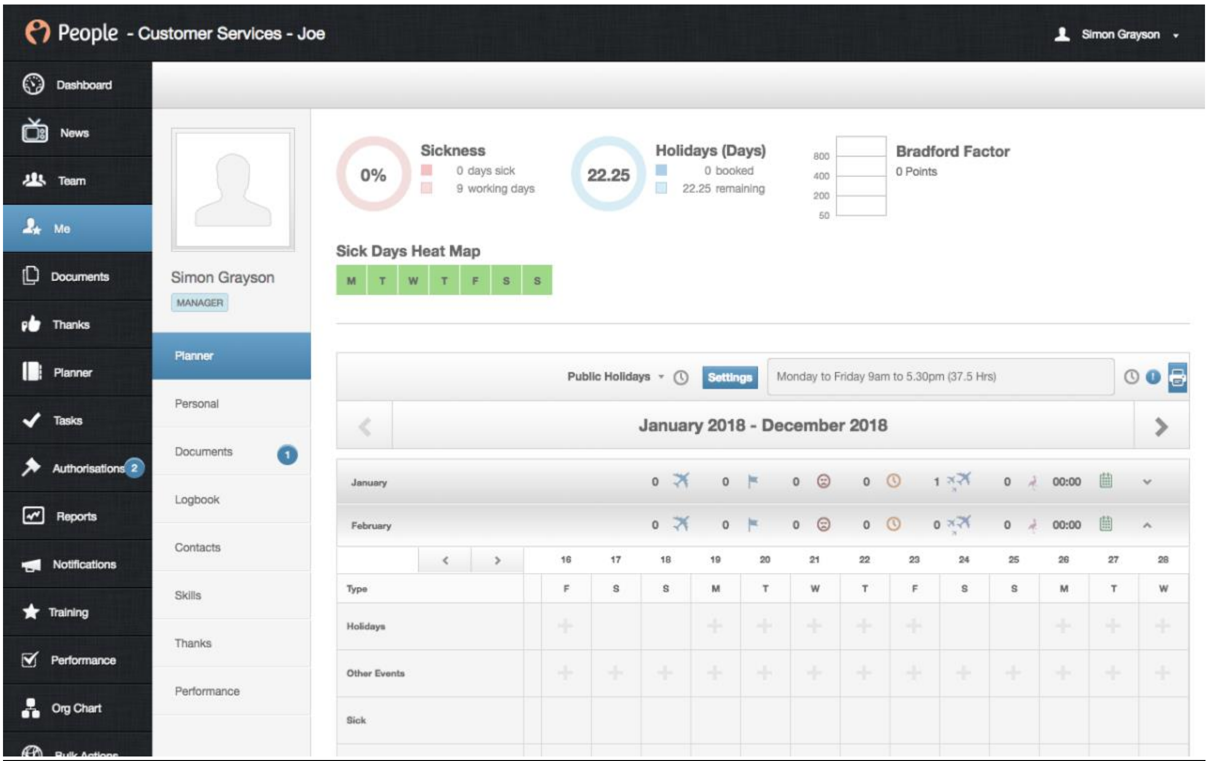
Clicking to Start a new review will launch your company performance review on behalf of your employee. You are also able to view past performance reviews in this tab.



Me

From your Me tab you can access your own record. You can view your personal information, book holidays and amend your contact information.

Me – Planner

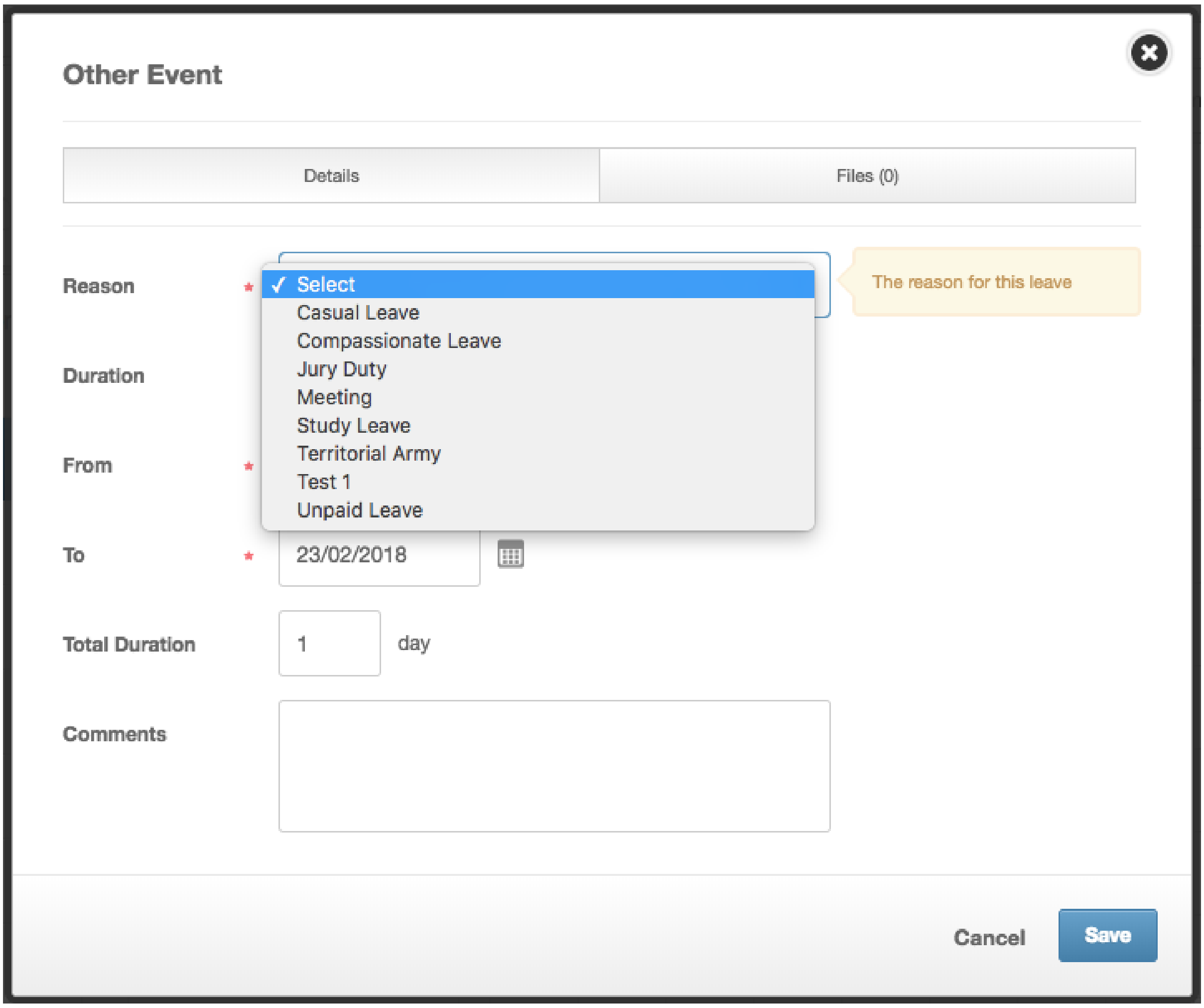


Within your Planner, you can view your attendance information. You will be able to see your sickness percentage, annual leave entitlement, Bradford Factor score and Sick Days Heat Map.

You are also able to book holidays and other events and view sickness and lateness.

Booking Annual and Other Leave

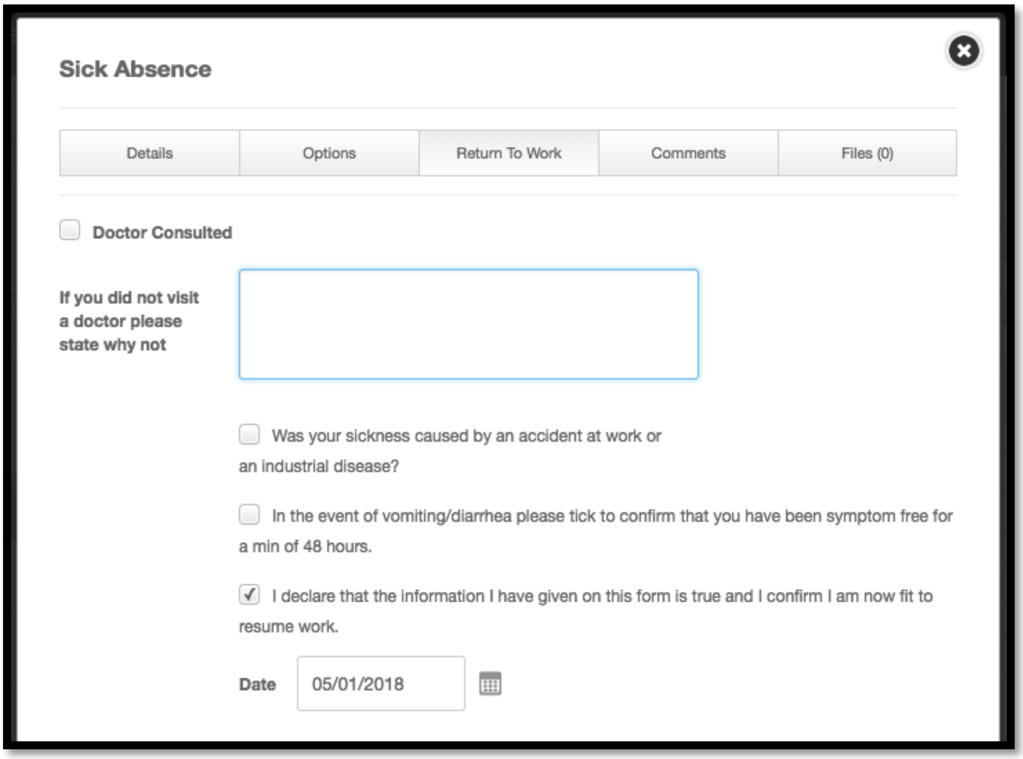
To book annual leave or other leave, click on the plus on the corresponding row and date. Annual leave can be booked as within your dashboard. To book other leave, you will need to select the relevant reason from the dropdown, enter the from and to dates and any comments. You can also add files into the second tab.



Filling a Return to Work

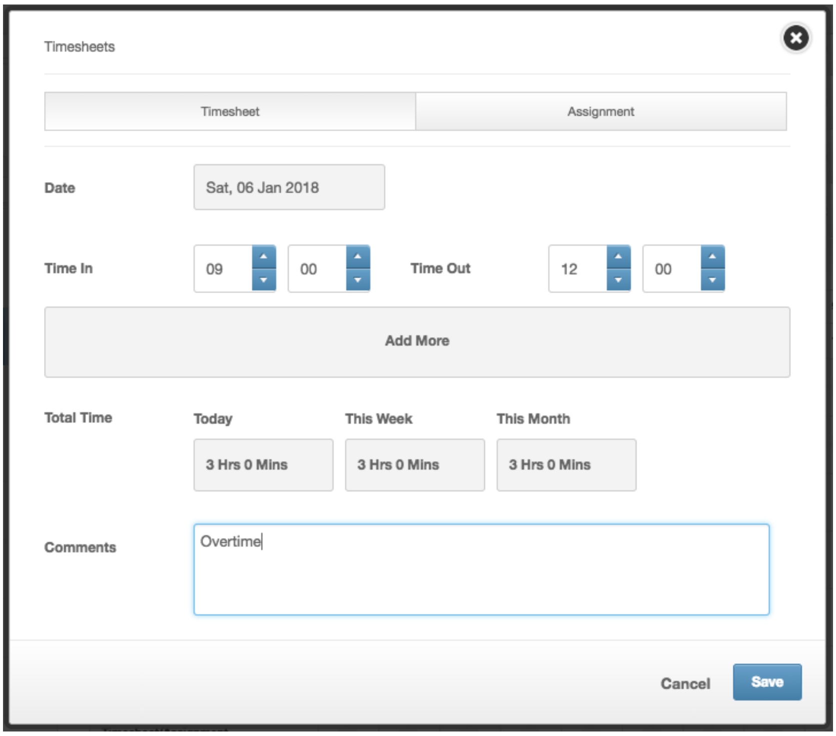
As part of your company's sickness policy, you may need to fill in return to work forms as part of your absence. If you click into the existing spell of sickness, within the Return to Work form you are able to answer the necessary questions as part of your return to work.

You are also able to view any other information, recorded by your manager or system administrator, from your absence entered into the other tabs.



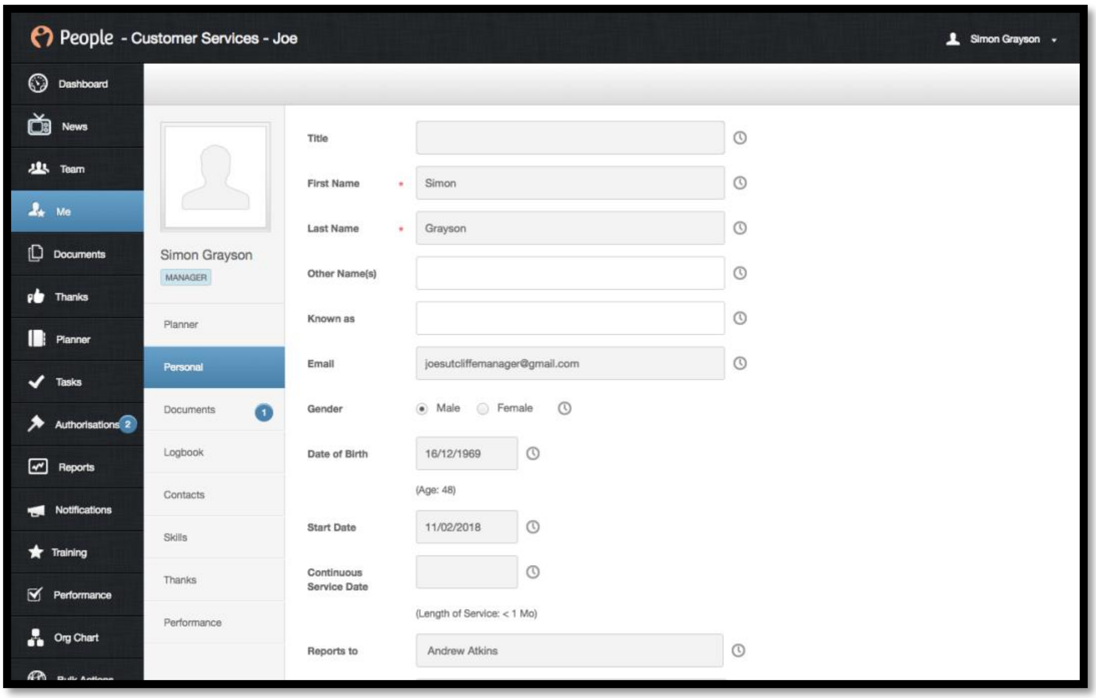
Timesheets/Assignments

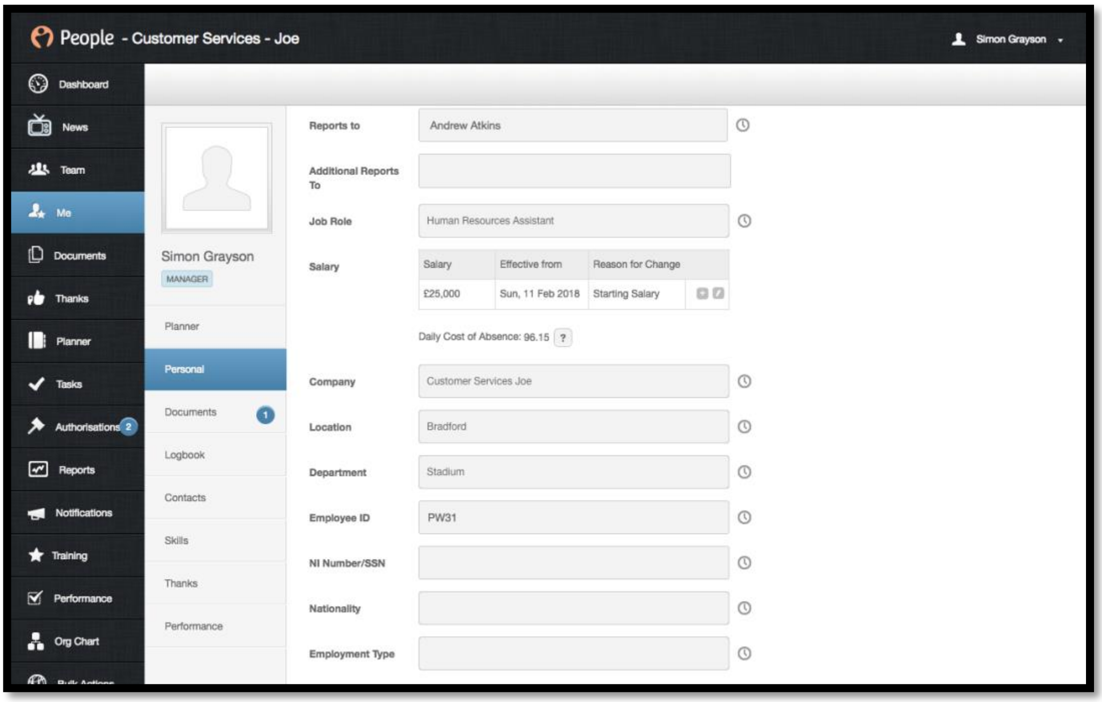
Within your planner you can also log timesheets and assignments. Depending what guidelines your HR team advise, these could be used to log your time in and out of work or any assignments you may have worked on.



Me - Personal

On your Personal tab you can view your job information, your salary and if your system administrators permit you, you can also upload your own photo.

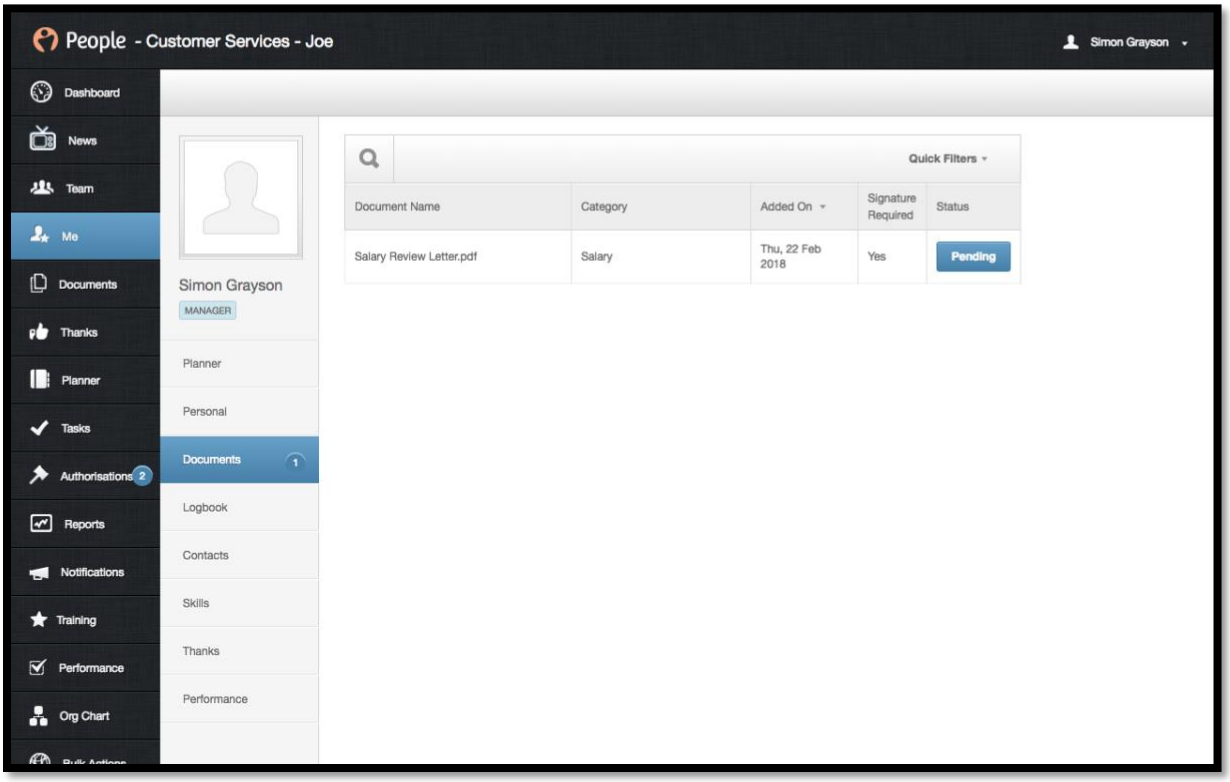




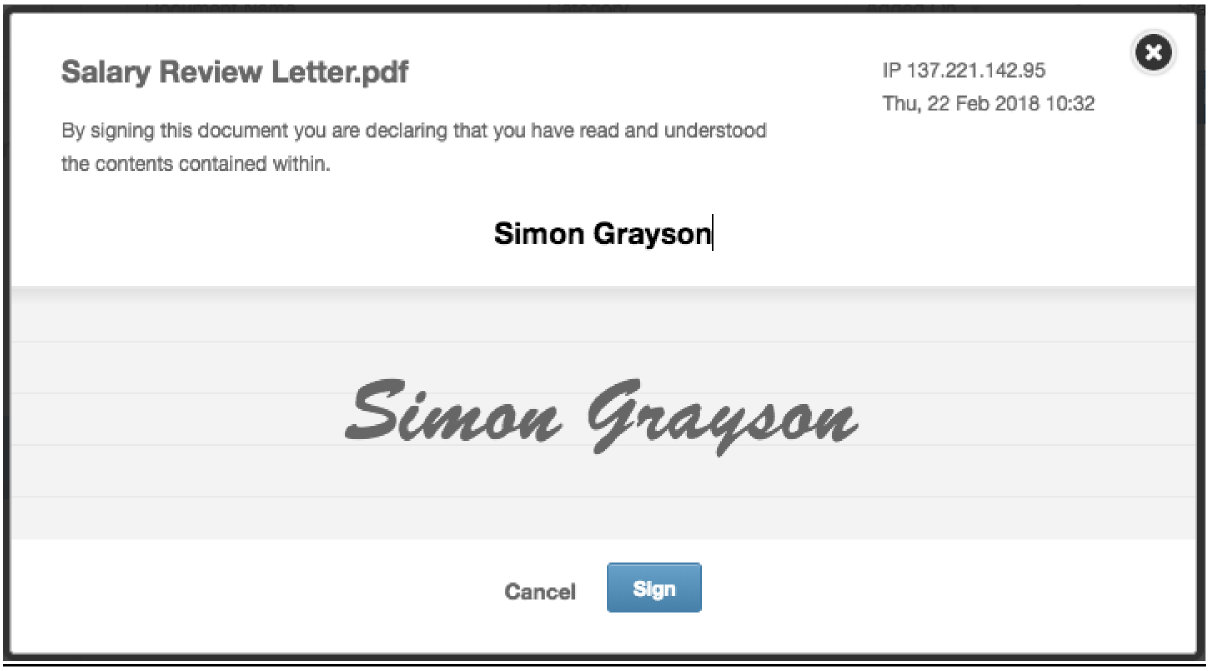
People

Me - Documents

The Documents tab in your record allows you to view your own personal documents.



You may also be asked to sign certain documents within your documents tab. If you see that a signature is required, you are able to click the pending and electronically sign documents.


Salary Review Letter.pdf
IP 137.221.142.95
Thu, 22 Feb 2018 10:32
By signing this document you are declaring that you have read and understood the contents contained within.
Simon Grayson
Simon Grayson
Cancel
Sign

Me - Logbook

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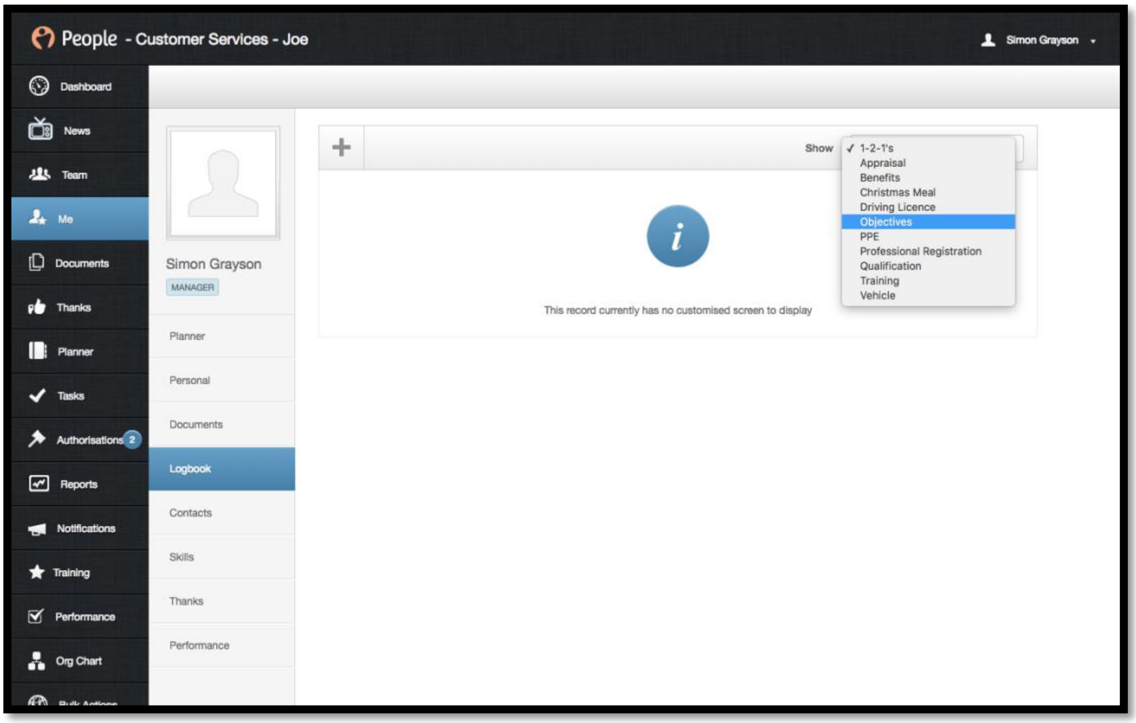

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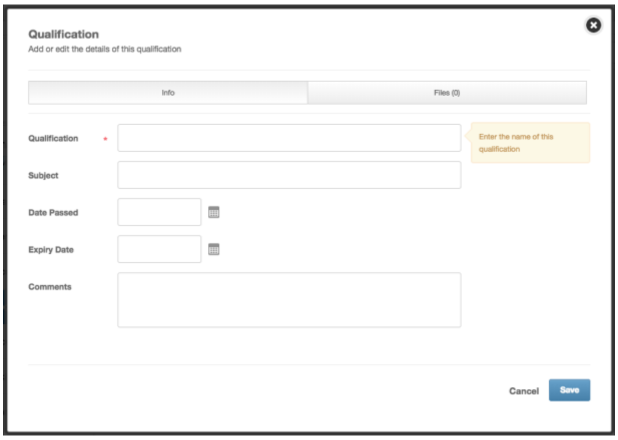
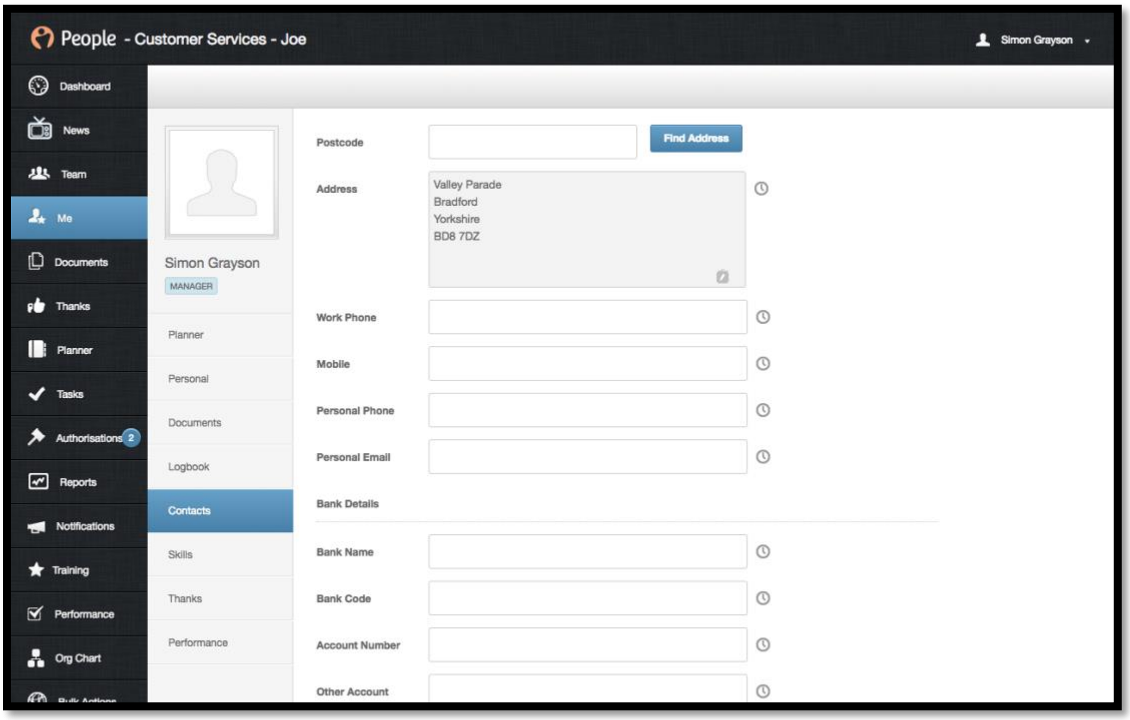
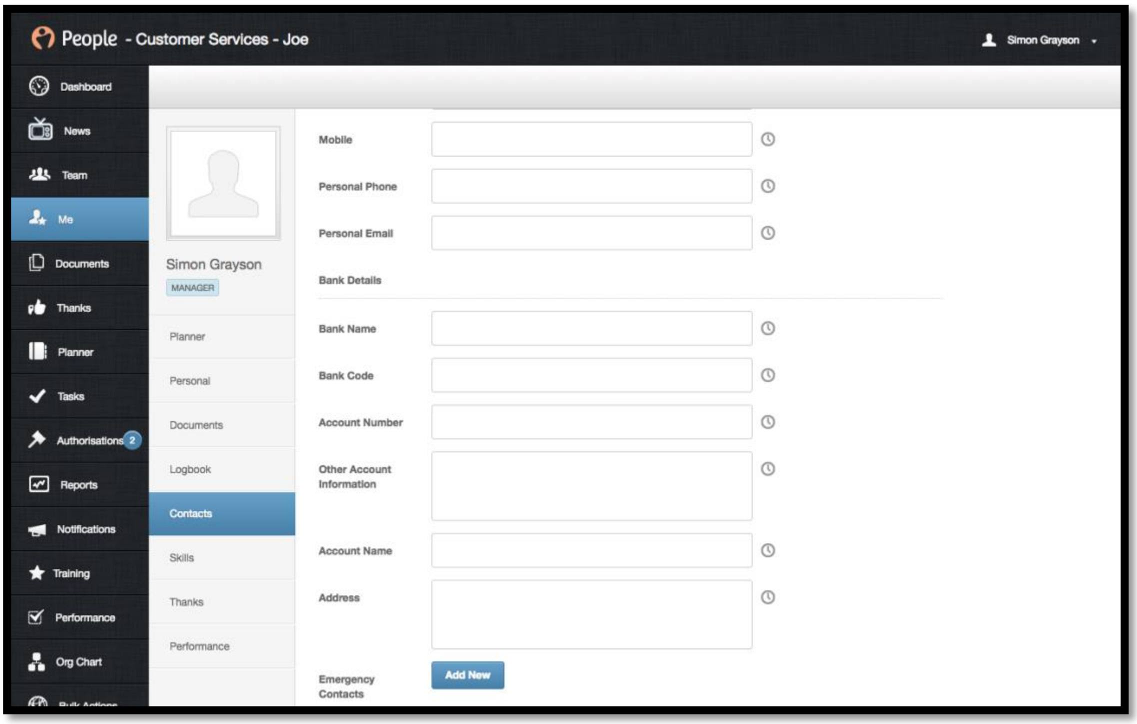


Me - Contacts

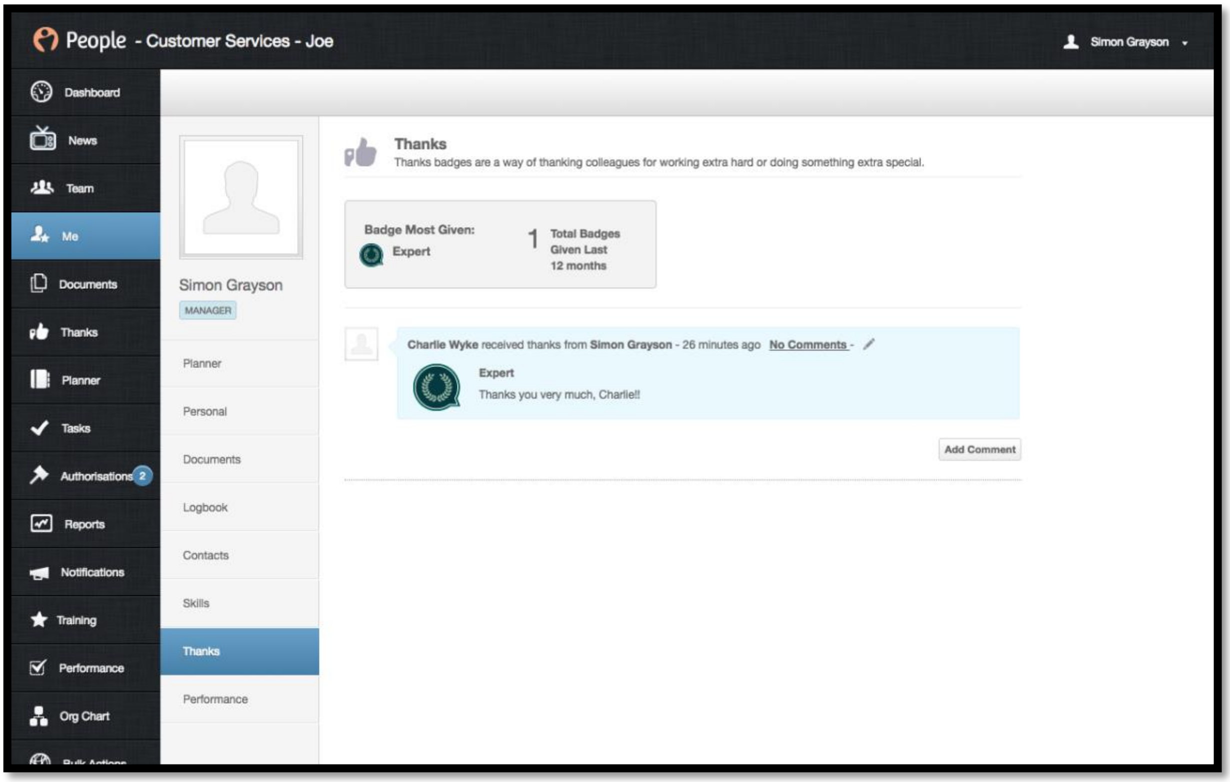
In your contacts tab, you are able to maintain and update your personal contact information and if required by your HR team your bank details too.



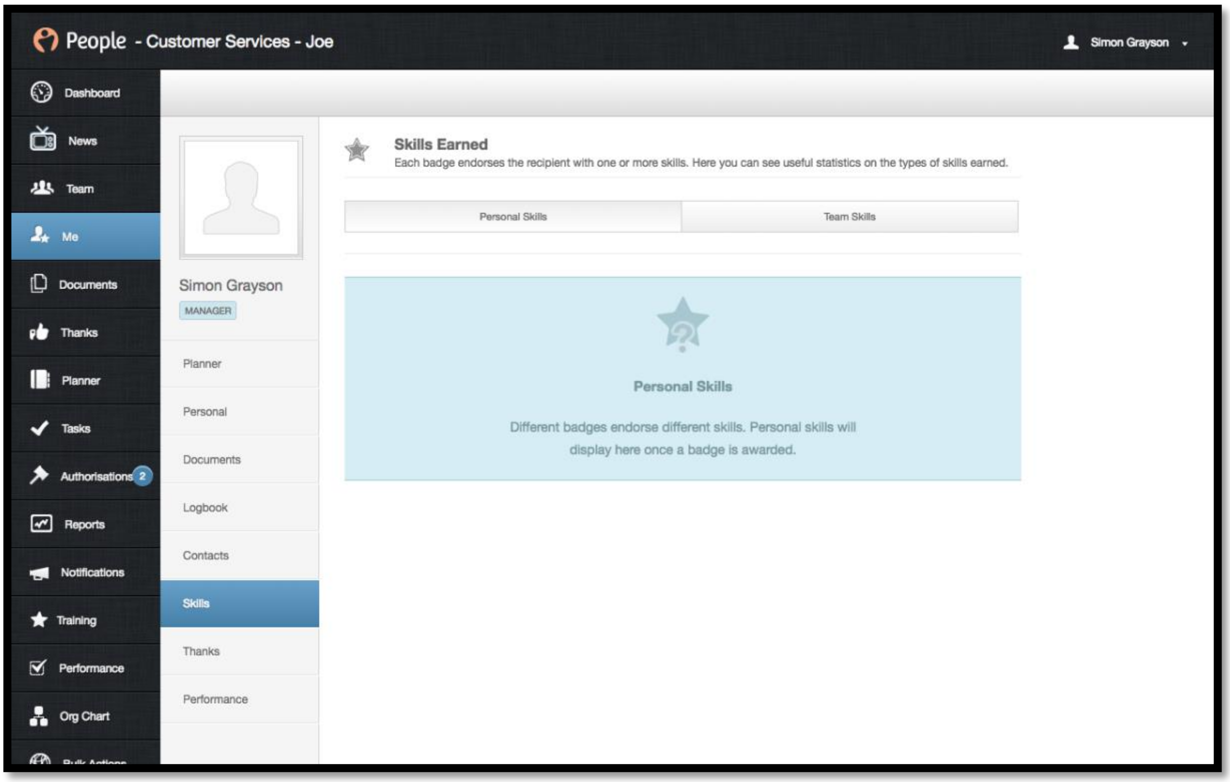


Me – Skills and Thanks

Your company may have enabled Thanks functionality within the system. This is a way of giving or receiving acknowledgment in the means of thanks badges. From your thanks tab, you may view what Thanks badges you have received or granted.



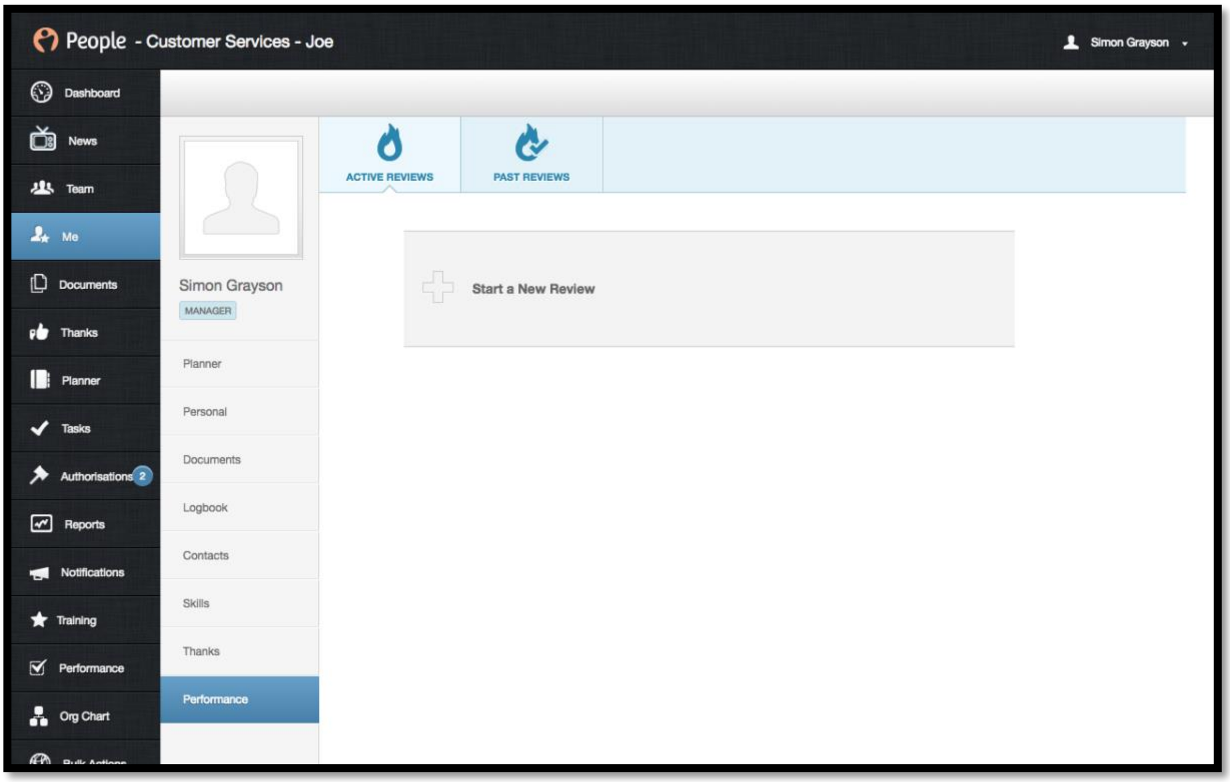
Any thanks badges you have received will link to a particular set of skills in the system. From the Skills tab, you are able to view which Skill points you have received.


People - Customer Services - Joe
Simon Grayson
Dashboard
News
Team
Me
Documents
Thanks
Planner
Tasks
Authorisations 2
Reports
Notifications
Training
Performance
Org Chart
Simon Grayson
MANAGER
Planner
Personal
Documents
Logbook
Contacts
Skills
Thanks
Performance
Skills Earned
Each badge endorses the recipient with one or more skills. Here you can see useful statistics on the types of skills earned.
Personal Skills
Team Skills
Personal Skills
Different badges endorse different skills. Personal skills will display here once a badge is awarded.

Performance

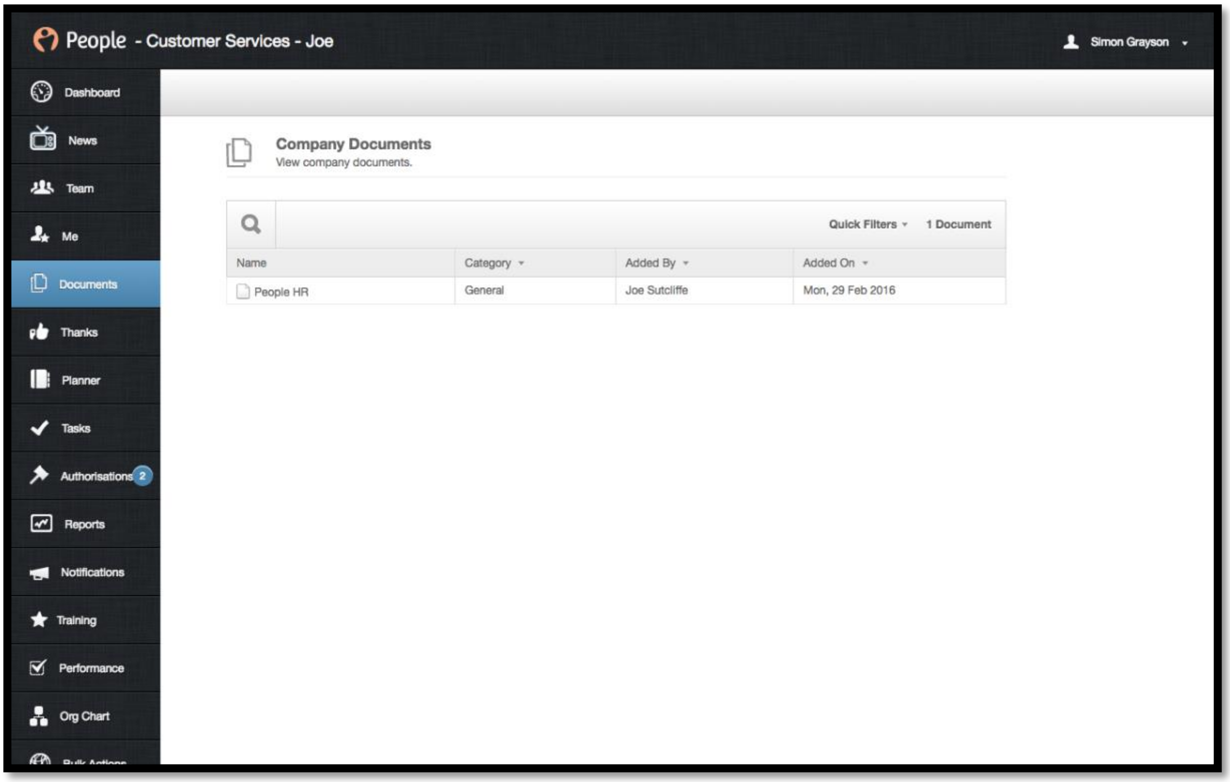
Your company may have a performance module. From here you can undertake performance reviews and submit feedback to your managers.

Clicking to Start a new review will launch your company performance review. You are also able to view past performance reviews in this tab.



Company Documents

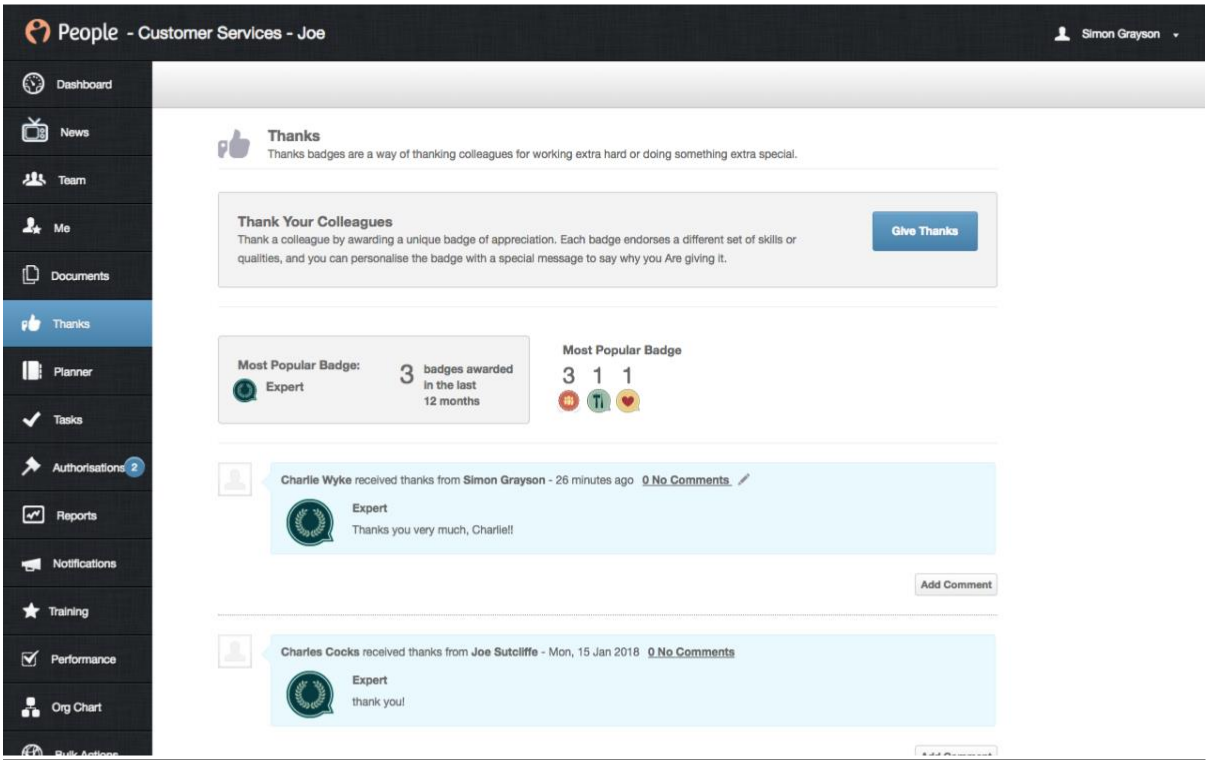
Coming out of your record, your HR may wish to store your company documents in the Documents tab. They may also add links into here you may need to access. You can download and view documents from your system or through the PeopleHR App.



People

Thanks

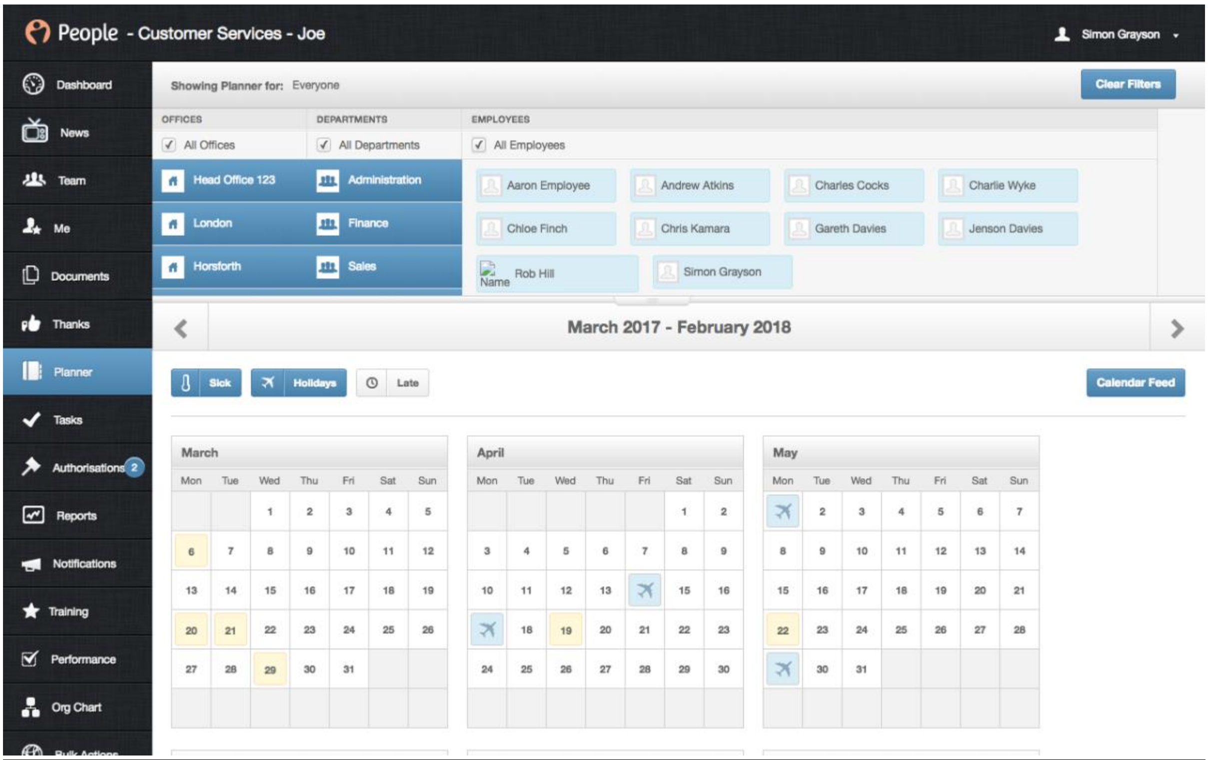
If your company opts to use the Thanks functionality, you are able to thank your colleagues outside of your team from the Thanks tab. You can also view all Thanks badges that have been across your system to your colleagues.



To Thank one of your colleagues, press the Give Thanks button. You can then select a badge, give comments and select which employee(s) deserve(s) this Thanks.

Planner

You will also be able to see a planner. This will show Holidays, Sickness and Other Leave within your team. You are able to select which employees you wish to view and you can also use this to book your own holidays around those dates.



The planner may work in the form of a heat map. This will explain why different days are showing in different colours. The key to which is explained here:

Red - Over 10%

Yellow - Over 5%

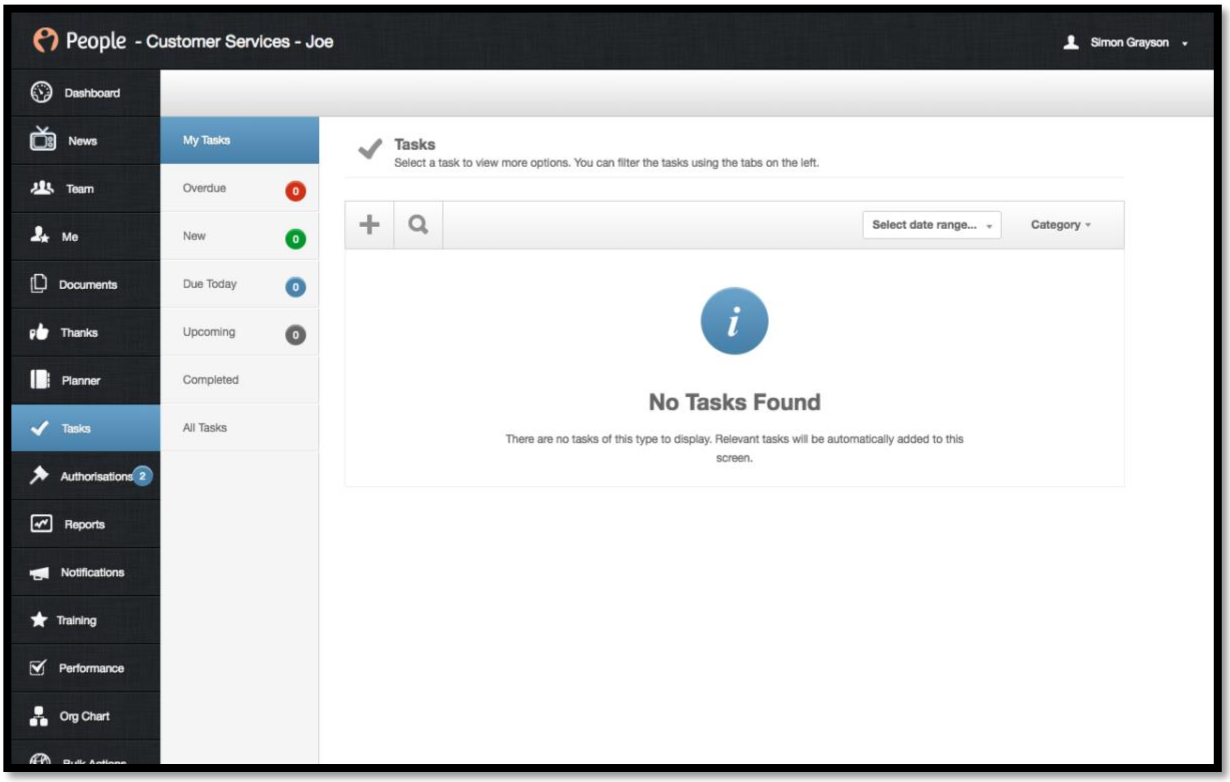
Green - Over 3%

Blue - Over 1%

White - no transactions

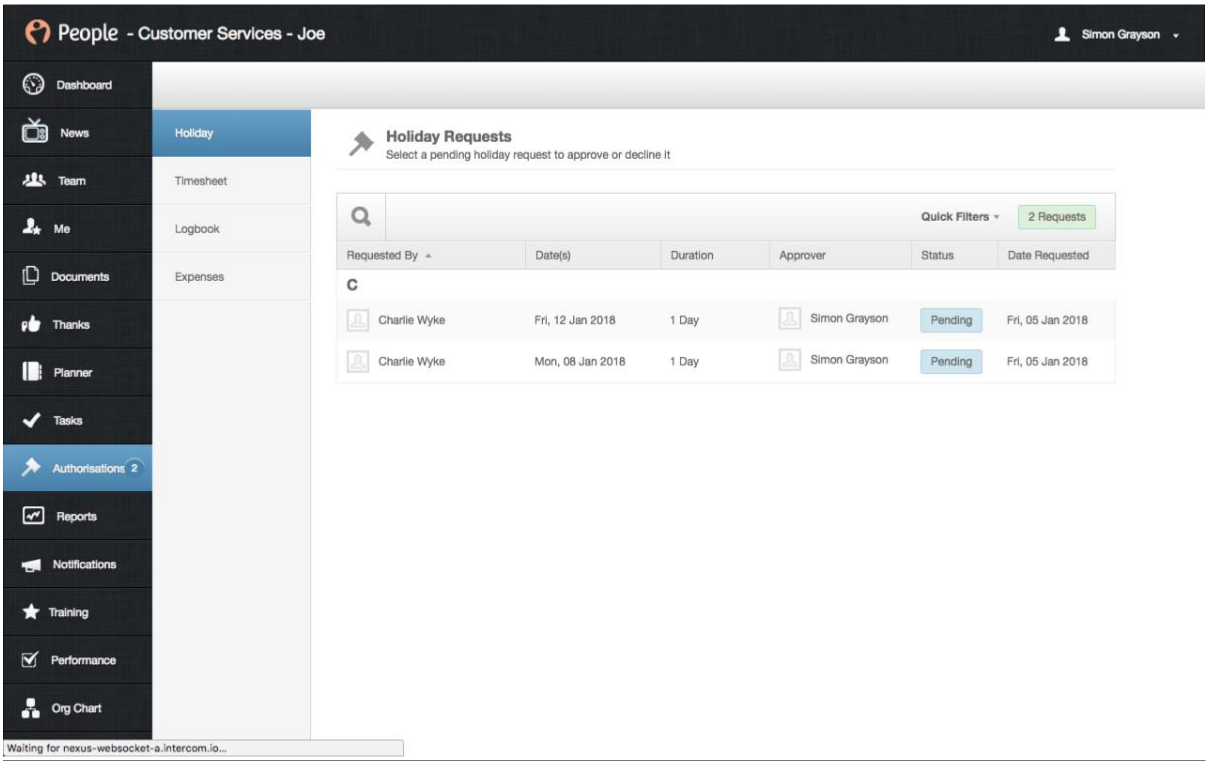
Tasks

Within People you have your own personal Tasks section where you can view and send tasks. You can assign new tasks to your colleagues by pressing the plus and click into any task to view them.

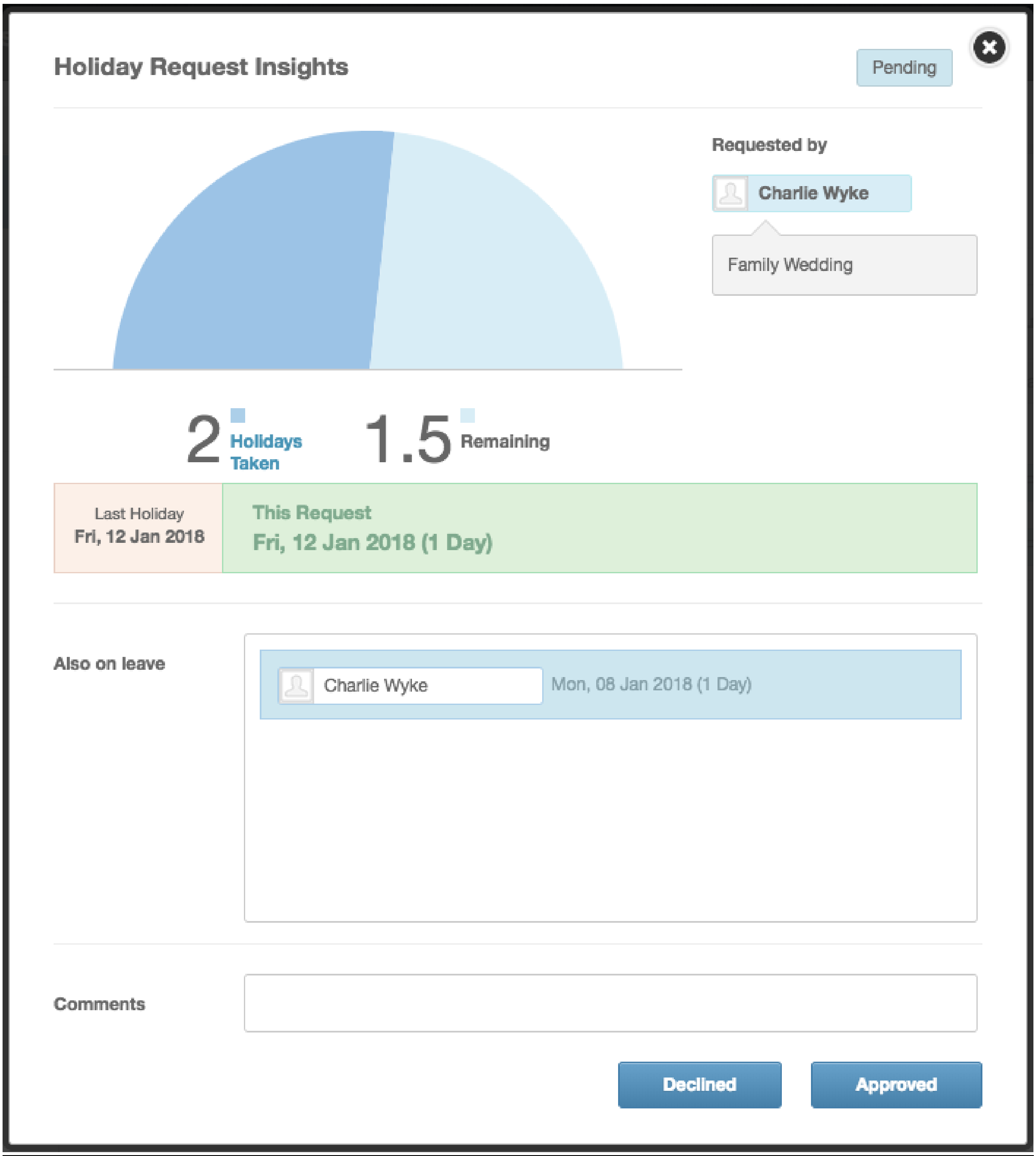


Authorisations

From the Authorisations tab, you are able to see any pending requests that you may need to decide upon. These could be in the form of holidays/other events, timesheets, logbooks and expenses. Using the Quick Filters option you can also view any decided requests and your own requests and whether they have been approved or declined or are still pending.

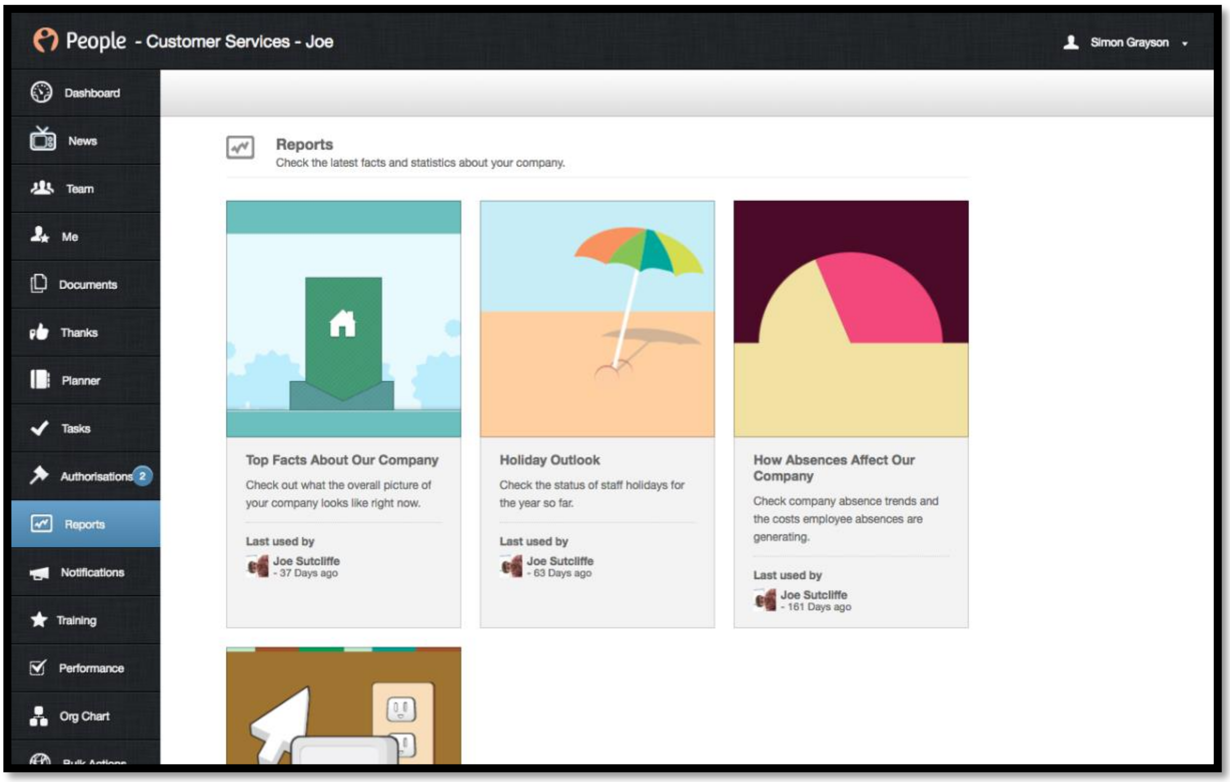


To approve a request in the system, select the Pending request and it will open a new window. You can view the information of the request and if it is a holiday or other leave request, you can view who else is on leave in your team around that time.


Holiday Request Insights
Pending
Requested by
Charlie Wyke
Family Wedding
2 Holidays Taken
1.5 Remaining
Last Holiday
Fri, 12 Jan 2018
This Request
Fri, 12 Jan 2018 (1 Day)
Also on leave
Charlie Wyke
Mon, 08 Jan 2018 (1 Day)
Comments
Declined
Approved

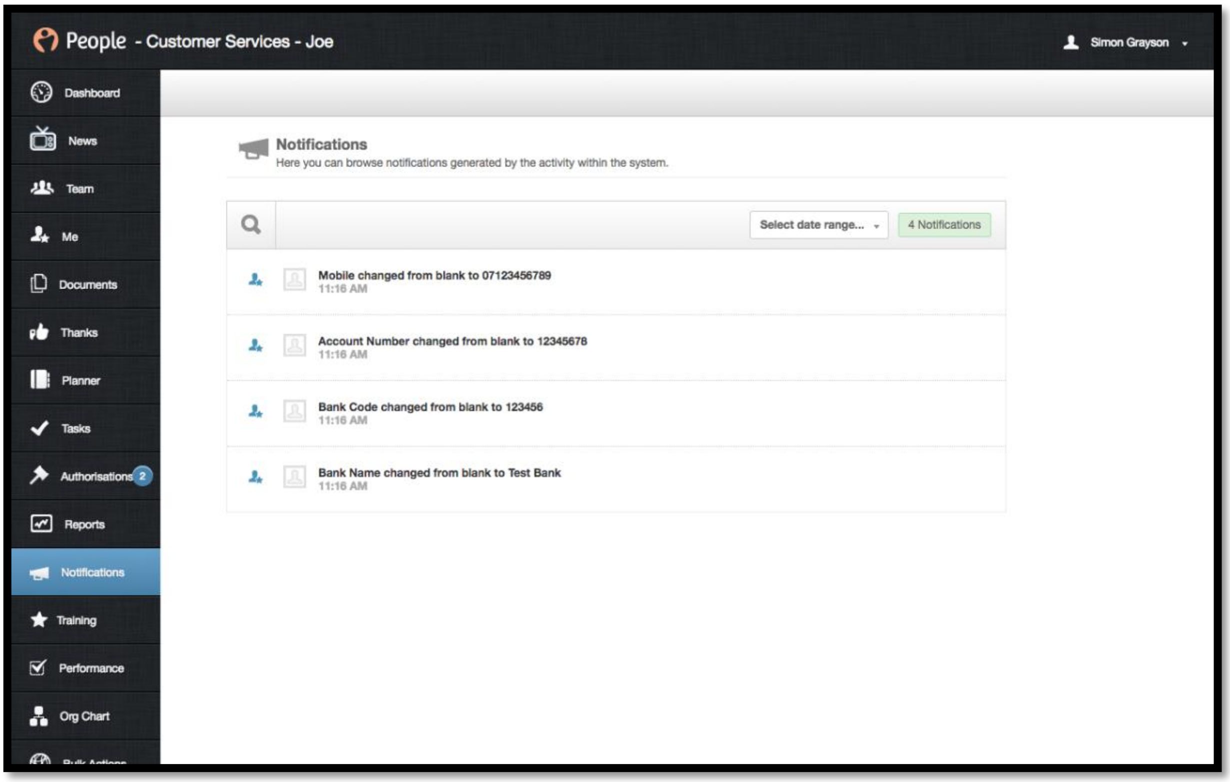
Reports

You will have access to some reports. You are able to run these reports to view some information for your team. Simply click the relevant report to run it.



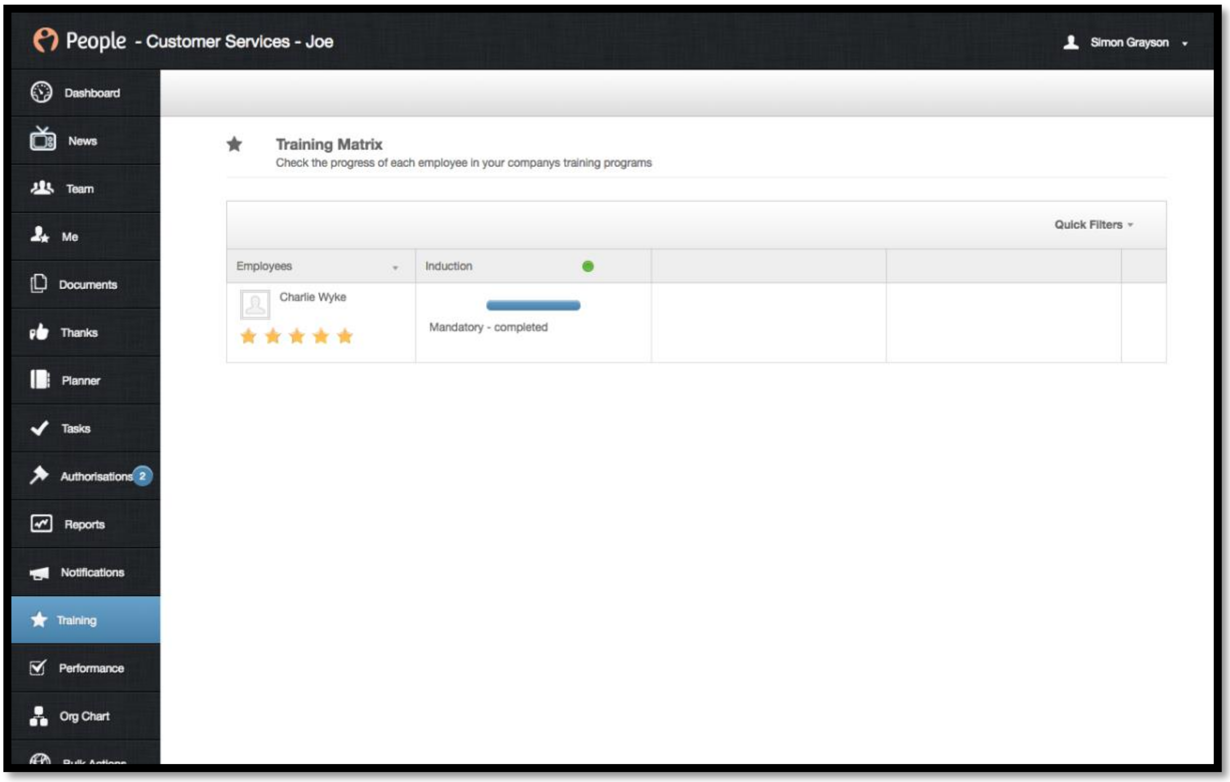
Notifications

Your notifications tab will alert you of any relevant activity in the system and to recap any amendments you have made to your record.



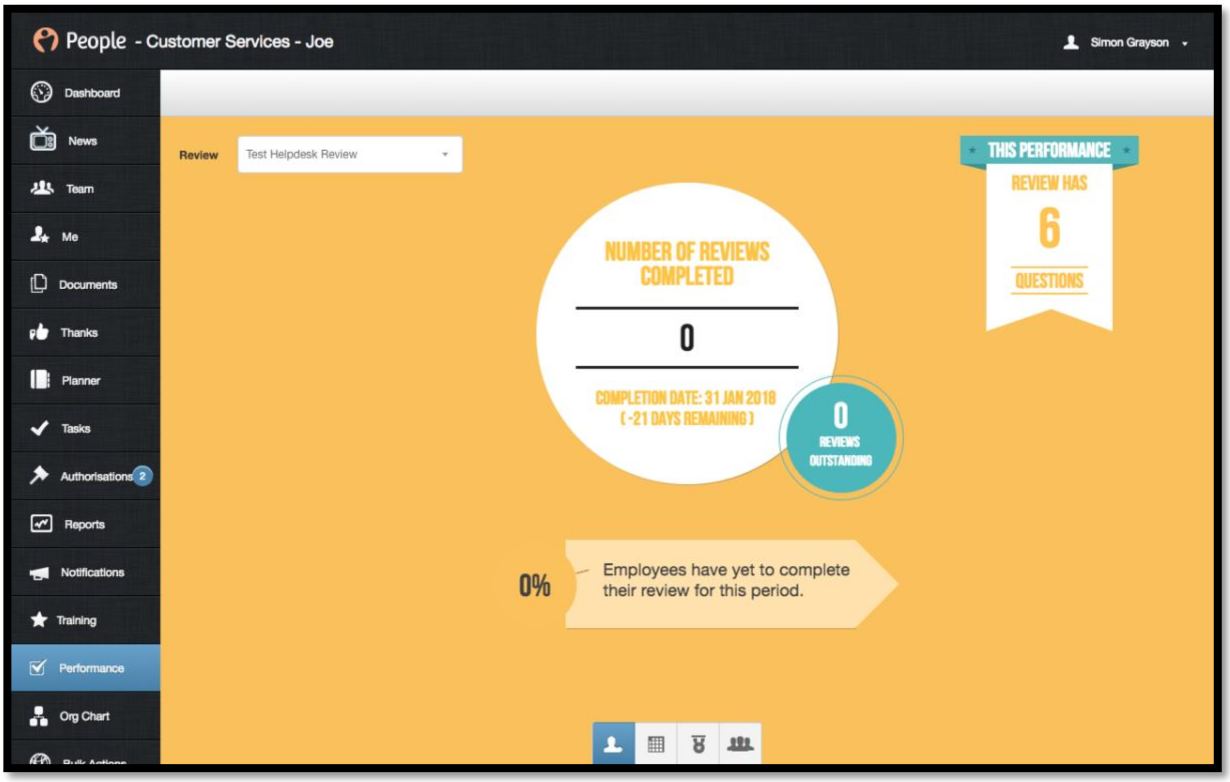
Training

You will have access a training matrix via the Training tab. This will show all training logged within the training logbook of all employees who report into you.



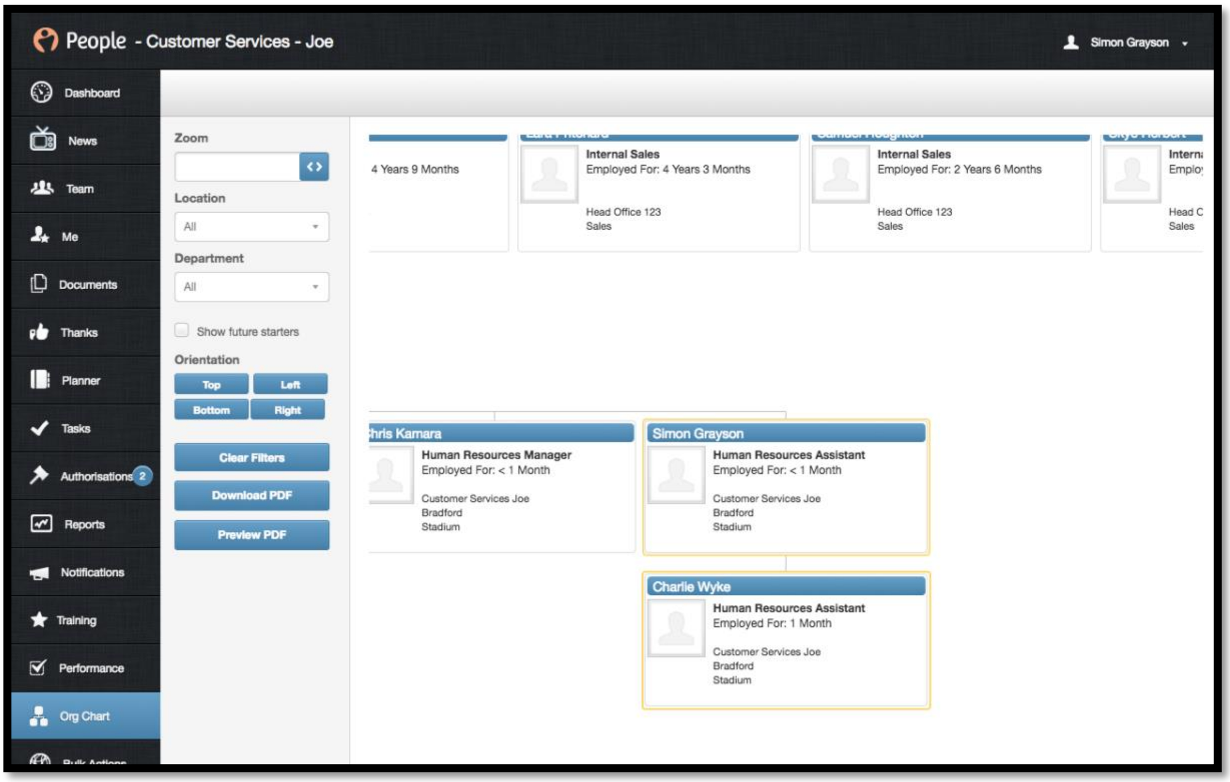
Performance

If your company has the performance module, you will have access to a performance tab. From here, you can see the progress of your team's performance reviews.



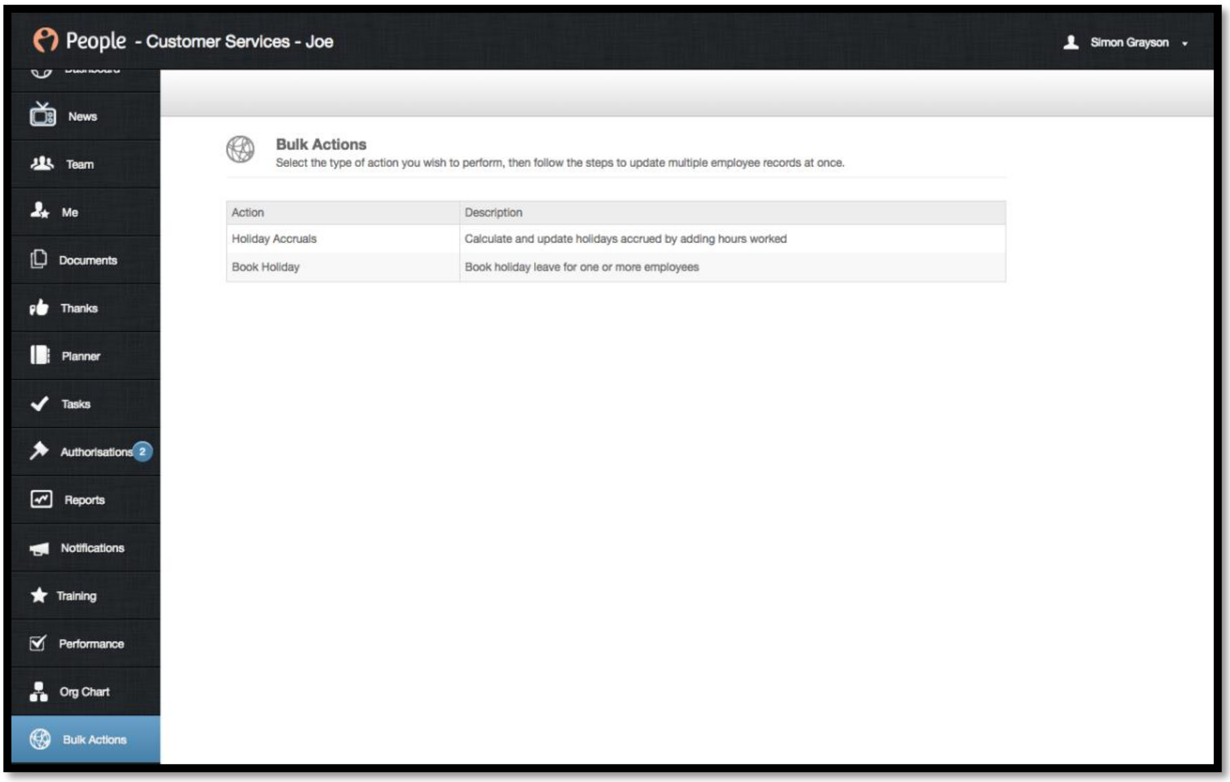
Org Chart

The organisation chart will show who reports to who in your company. You can use the zoom feature, filter by companies, locations and departments and are also able to export the org chart to a PDF.



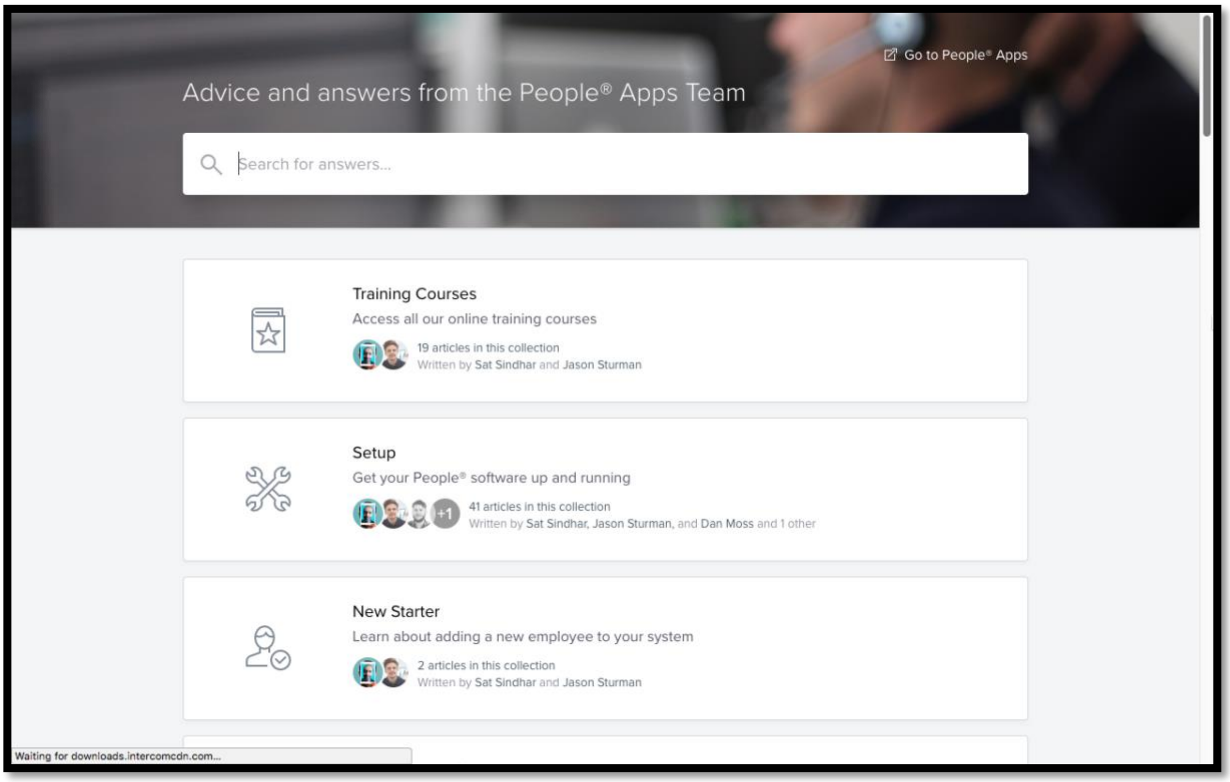
Bulk Actions

The last tab you will have access to in your system is the Bulk Actions tab. Using the bulk actions, you can book holiday for your team in bulk. You may have employees in your team that accrue their holidays from hours worked. If you do, you can select the relevant employees and enter the number of hours they've worked over the given period.



Help

If you hover over your name in the very top right-hand corner, you are also able to access the Help Centre. From here you can browse and search through articles, videos and our content.



Forgetting your Password

If you forget your password, then you are able to reset your own. From the login screen, under your detail there is a Forgot your Password option. If you click this, you can enter your email address and it will give you're the option to reset your password.