Set up your People HR ready to go live

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Version 1

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Introduction

To make your PeopleHR system live, enter into your Settings > Licenses > Activate Self Service. This then makes the system live.

You then have the option to send welcome message. This will send a welcome email to all employees, asking them to log in for the first time.

http://help.peoplehr.com/setup/setup/self-service-and-the-welcome-email

Within the licence settings you can also check you have the correct licenses as part of your package. If these do not appear to be correct, please speak to your project coordinator.

Launching to a Pilot Group or Single Employee

If you do wish for a non-administrator to access the system, it is possible to send the welcome email to a single employee. This can also be done for several employees if you wish to launch People to a Pilot group.

To do this, simply click on 'Activate Self Service' and then click on 'Save' in the new pop up.

NOTE: At this stage don't click 'Send Welcome Message' as this will send the welcome email to the whole company.

Then, access the relevant employee's record and enter the personal tab. Where you see the employees email address, remove this (a box will pop up asking for the reason for the change, simply enter something like Welcome Email) and then re-enter the email address. This will automatically trigger the welcome email to that one employee.

Simply do this to all other employees you wish to roll the system out for.

Before Go Live

Before you go live, it may be worth going through the following checklist(s) to make sure your system is set up how you wish. You should complete the checklist relevant to the package you have purchased.

N.B. Not all of these may be essential to your company when going live. You may only wish to choose certain aspects of the system to use when rolling out.

Team

Action	Complete?
Decide upon your administrators. To give another employee administrator access, enter their record from the employees tab and select Give Admin Status via the quick actions. The other admins can then assist in setting up the system. http://help.peoplehr.com/employee-profile/giving-a-user-admin-status Then to prompt the new admin with a Welcome Email, enter into their Personal, remove their email address and re-enter. Upon the re-entry, it will prompt the welcome email.	
Sense check your data. Before you go live and employees log in, it would be a good idea to sense check your data in the system. This would be best done via running queries. Look out for fields such as Job Role, Company, Location, Department, Reports To and Salary and any other fields you have entered data into. http://help.peoplehr.com/reports-and-queries/queries-how-to-create-a-query When employees log in, it would be useful for them to check their own data too. Such as Bank Details, Emergency Contacts, Holiday Entitlements etc.	
Holidays and Absence Settings. In the Settings, you can amend your holiday and absence settings. **Settings > Holiday and Absence.** http://help.peoplehr.com/setup/setup/basic-people-settings	
Company Settings. From the Settings tab, you can also amend the Company settings. **Settings > Company.** http://help.peoplehr.com/setup/setup/basic-people-settings	

Employee Settings. Within the employee settings, you can determine what employees and managers can view and see in the system. In here, you can also amend which logbooks are visible in the system. **Settings > Employee.** http://help.peoplehr.com/setup/employeemanager-settings	
Any other Settings. After the main settings, you can then access any other settings you may need: • **Accrual** (Create any holiday accrual rules) http://help.peoplehr.com/setup/configure-your-pto-policy-and-accrual-rules • **Authorisations** (Specify any additional holiday approvers) http://help.peoplehr.com/holiday-entitlements-requests/holiday-approval-workflow • **Timesheets** (Set up the timesheet and assignment settings) http://help.peoplehr.com/setup/setup/timesheetassignment-project-settings • **Thanks** (Customise and create your very own Thanks badges) http://help.peoplehr.com/engaging-your-employees-and-managers/thanks-overview • **Email** (Subscribe to the Recap emails of the system) http://help.peoplehr.com/engaging-your-employees-and-managers/daily-recap-email-admin • **Mobile** (Define the mobile phone app settings http://help.peoplehr.com/mobile-application/settings-for-the-mobile-app • **Expenses** (Determine whether you wish to use the Expenses functionality in the app and set the settings) http://help.peoplehr.com/expenses/expenses • **News** (Decide whether you want to use the News feature and set if Managers can publish News) http://help.peoplehr.com/engaging-your-employees-and-managers/news-settings-publishing	

• **Notifications** (Edit the Notifications settings to select who can receive system notifications) http://help.peoplehr.com/setup/setup/notifications • **Localization** (Customise your languages per location) http://help.peoplehr.com/language-settings/localization-languages	
Documents (Company). In the Documents tab, upload any existing company documents. This could include your handbook and any policies. **Documents**. http://help.peoplehr.com/documents/company-documents	
Documents (Personal). Add any existing personal documents of each employee into their personal Documents tab. **Employees > Find employee > Documents.** http://help.peoplehr.com/documents/employee-documents	
Queries. Set up any queries you or other employees in the company may need. **Queries.** http://help.peoplehr.com/reports-queries-data/queries-how-to-create-a-query	
Logbook Data. Upload any data into the existing logbook screens. **Employees > Find employee > Logbook** Example: http://help.peoplehr.com/logbook/add-benefits-in-the-logbook-to-an-employees-record	
Manage your Lists Manage any manageable lists in the system. Including Company, Location, Department, Job Roles, Sickness Reasons and Other Event Reasons etc. http://help.peoplehr.com/setup/managed-lists-drop-downs	

Create and Assign Work Patterns In the new starter wizard, employee’s record or Holidays and Absences setting you are able to create work patterns. You can then assign them to staff individually or as a bulk action. http://help.peoplehr.com/employee-profile/create-and-add-work-patterns	

Professional

Action	**Complete?**
All of the above from <u>Team</u>.	
API. Create any API links you may need for integration with People. **Settings > API.** http://help.peoplehr.com/api/api	
Single Sign On. Determine whether you are going to use single sign on to log into your system. **Settings > Company.** http://help.peoplehr.com/integrations/what-is-single-sign-on-sso	

Enterprise

Action	Complete?
All of the above from <u>Team</u> and <u>Professional</u>.	
Customise your Logbook Screens. Customise and design your very own logbook screens to store your own data. **Employees > Find Employee > Logbooks > Add New Screen from dropdown** http://help.peoplehr.com/logbook/customise-the-logbook	
Add data to your custom logbook screens. Upload your own data to your custom logbook screens with a bulk actions. http://help.peoplehr.com/bulk-actions/bulk-actions-logbook-data-upload	
Performance. Create your performance reviews in the system. http://help.peoplehr.com/performance-management/performance-review-setup	
ATS Settings. Customise your ATS settings. http://help.peoplehr.com/applicant-tracking-system-ats/ats-settings	
ATS. Add any vacancies to your ATS. http://help.peoplehr.com/applicant-tracking-system-ats/ats-settings	
Link your vacancies to your website. You can link any vacancies from the ATS http://help.peoplehr.com/applicant-tracking-system-ats/ats-rss-feed	

Elite

Action	Complete?
All of the above from Team, Professional and Enterprise.	
Ripple. Design any automated workflows with Ripple. http://help.peoplehr.com/ripple/ripple-overview	
Design your own Reports. Design and create your very own infographics based on your data in the system. **Reports > Design a New Report.** http://help.peoplehr.com/reports-queries-data/report-designer-how-to-create-a-custom-report	