People HR Mobile Application

The Basics

Author: Abbi Melville
Date30/07/2020
Version 1

Table of Contents

Introduction

The People HR mobile app aims to help you access accurate information, from anywhere on the go. It is a painless way to manage HR tasks like holiday requests, expense claims or performance reviews. This PDF will walk employees through how to use the Mobile App, answering all the questions they may have, and freeing up the HR admins time.

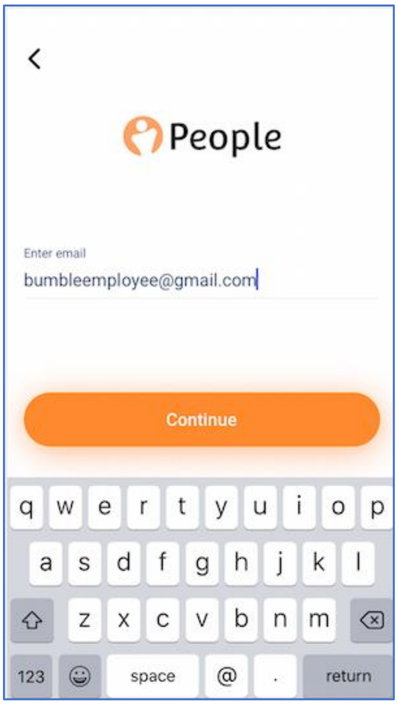
This document contains the basics to get an employee started with the mobile app. For all information on the mobile, such as Tap in|out, News, Thanks etc. please visit out helpsite https://help.peoplehr.com and scroll down to the 'Mobile Application' section.

Make future logins quick and easy

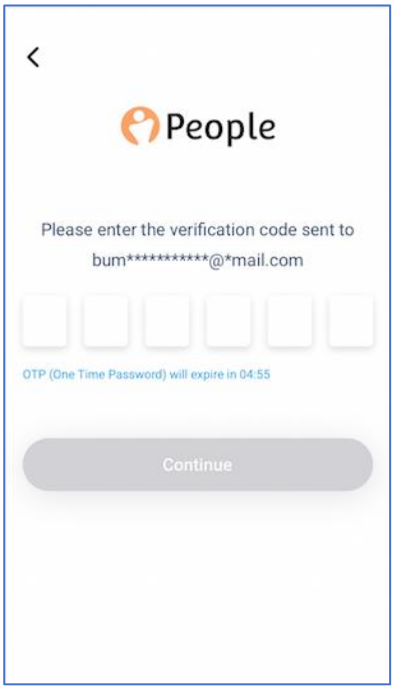
For the mobile app, you no longer need your password - we will send you a one-time password (OTP) for the first login, and you'll then have the option to use your phone's unlock security (keypad password, fingerprint, face ID etc.)

It's important to understand how this login flow works, the aim is to set up biometrics upon first-time login, to make it quick and easy to log in in the future. If you always click cancel when having this option, it could take quite some time for every future login. Let's walk you through this process now.

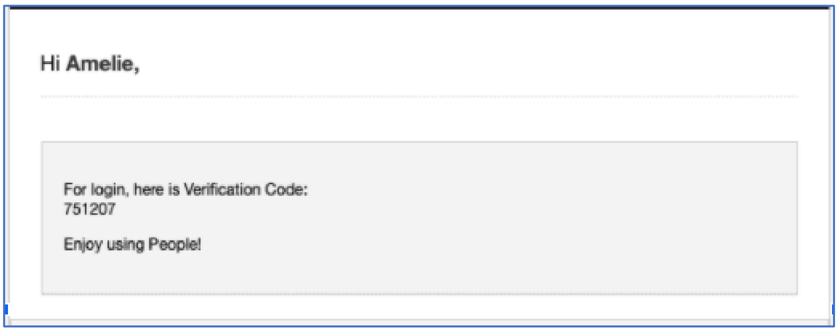
1. Once you've downloaded the app, type in the email address you would usually login to your People HR account with:



2. Click Continue. You will then be presented with the following screen:



3. This will trigger an email containing a 6-digit one-time password.



Hi Amelie,

For login, here is Verification Code:
751207

Enjoy using People!

4. Enter this password on the mobile app and click Continue.

Now, the important part…

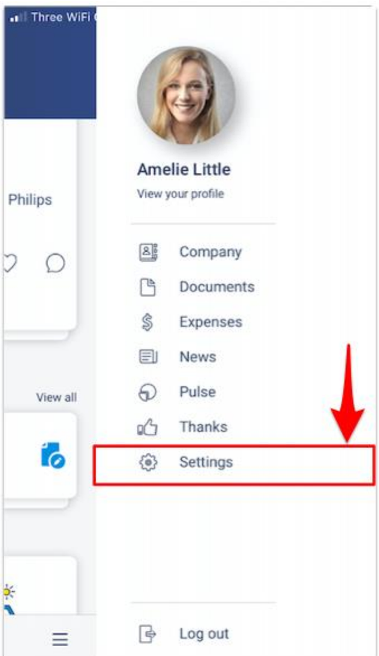
5. Next you'll be presented with two options:

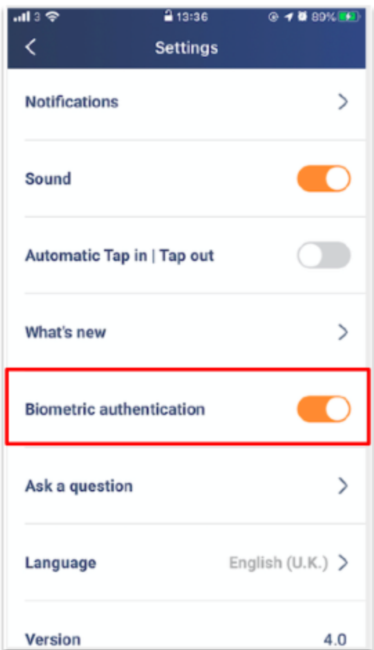
- To use your phone's unlock security (option differs per device)
- To Cancel

By clicking Cancel, you will have to follow this process again every time you log in, which is how it was designed. By Setting up biometrics, it will only take a second to identify you and take you straight to the app every future login.

6. Verify your Face ID, fingerprint or passcode and welcome to your new mobile app!

If you do skip this step, you can turn this on later in your Settings:

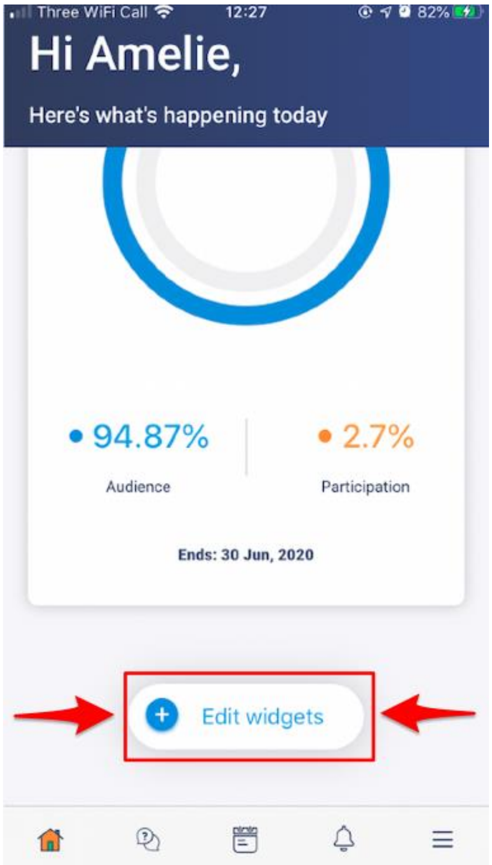




Dashboard

The mobile dashboard is the first screen you will be taken to when you log in. Each widget is designed to bring you all the information you need at a quick glance, and the ability to access the area you need with a quick tap.

Here you can book a holiday, add an expense, view news and (depending on your company settings) clock in and out – directly from this screen.



Edit Widgets

You can move your widgets around to arrange them in an order that will suit your priorities. To do this, scroll right to the bottom and click the 'Edit Widgets' icon.

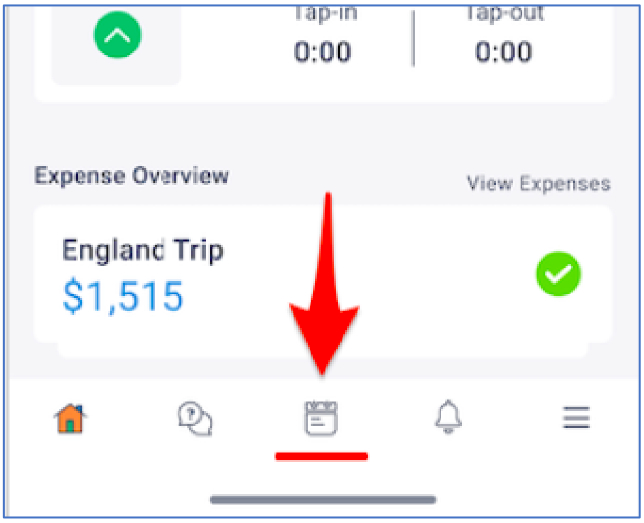
Please note that your widget order will be saved to your login, however will be reset if another user logs in from your device.

At the bottom you have some icons for quick access to another area, from left to right these are:

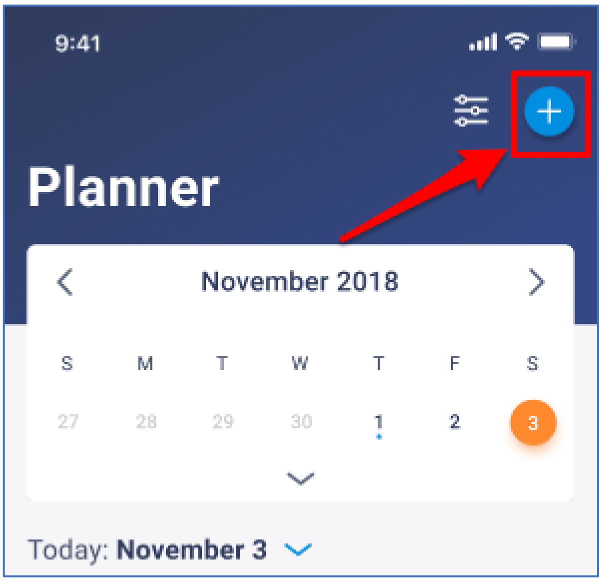
- Dashboard/Home screen
- Chat
- Planner
- Notifications
- Burger menu – for additional mobile features.

Request a holiday

1. Click on the planner icon at the bottom



2. Click the plus icon in the top right hand corner:



3. Click to add a holiday from the list provided.

4. If the holiday is less than a day, click the toggle at the top to specify. This will the next few options.

5. Use the calendar to select the start date of holiday, and if more than a day, the end date for the holiday too.

6. Add any comments and select whether or not you wish to use your TOIL balance

7. 7. Scroll down and click 'Submit'.

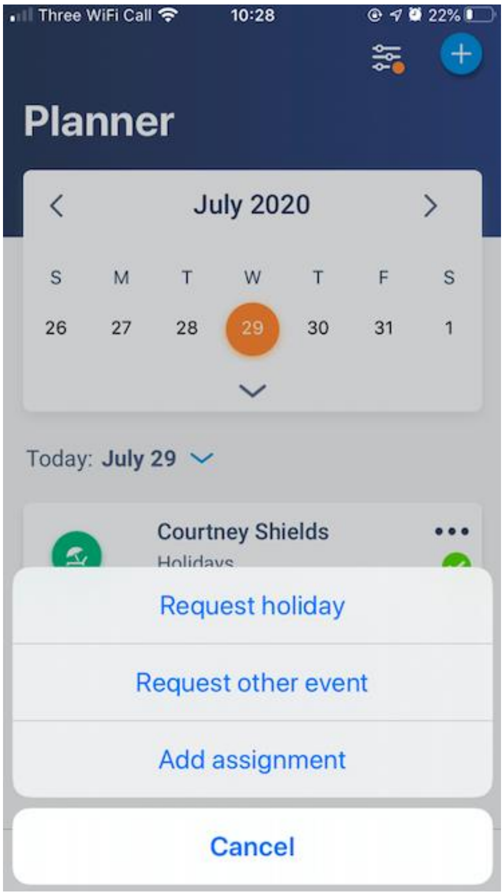
Pending requests

Once submitting your holiday, the approver will get an email/notification letting them know that you have requested this.

You will receive an email/notification once this has been approved or declined. You can also keep checking your request in the planner to see if the icon has changed from pending to approved/declined.

Other events and assignments

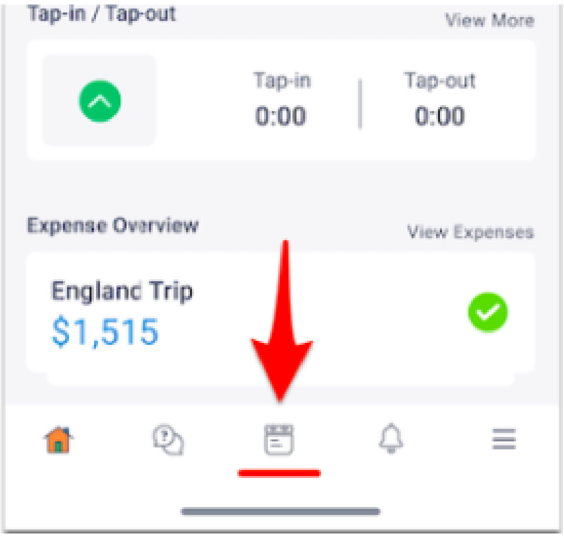
You can also add other events and assignments by following the instructions above - but selecting the relevant option when clicking the plus icon in the planner.



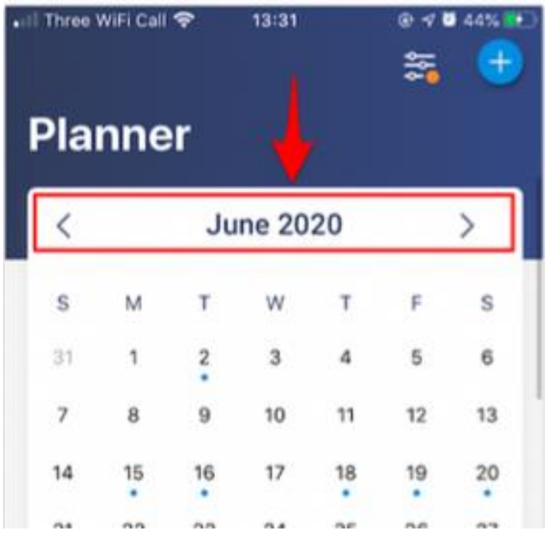
Viewing your teams holidays and events

The company planner on your People® mobile app is great for quickly finding out who is out of the office on a certain day, as well a quick look at absences throughout the week or month. You can also use book holidays and other events from here.

1. To view the company planner, click the calendar icon at the bottom of your screen.

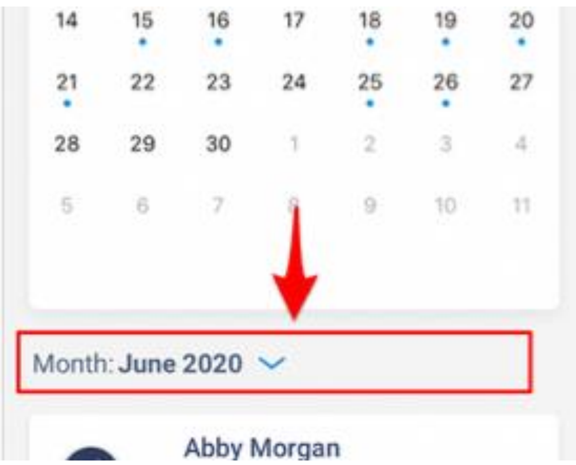


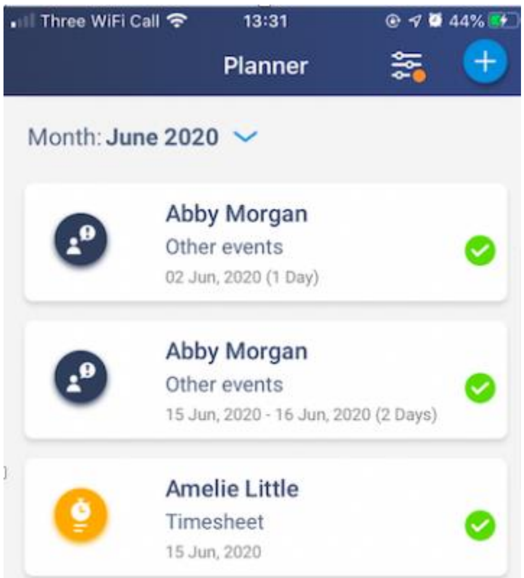
2. Once you're in the planner, you can use the top arrows to flick through months:



Viewing events in detail

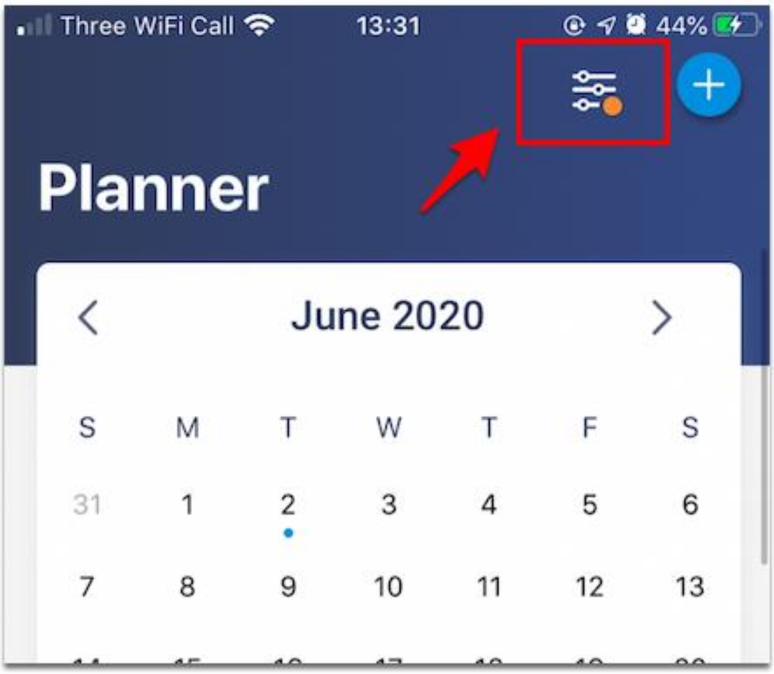
The dots you see under a specific day shows that there is an event/absence on that day. You can then tap on the filter underneath the calendar and choose which view you would like between daily, weekly or monthly. Based on your selection, the events for that day/week/month will be shown in detail below that filter.

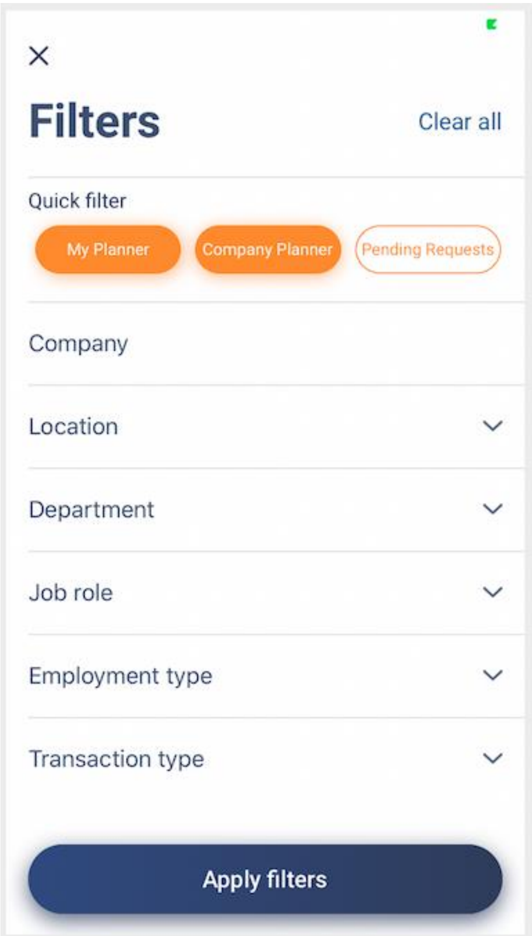




Filter by team

If you wish to see all events/absences for a certain team, you can also click the filter icon at the top:

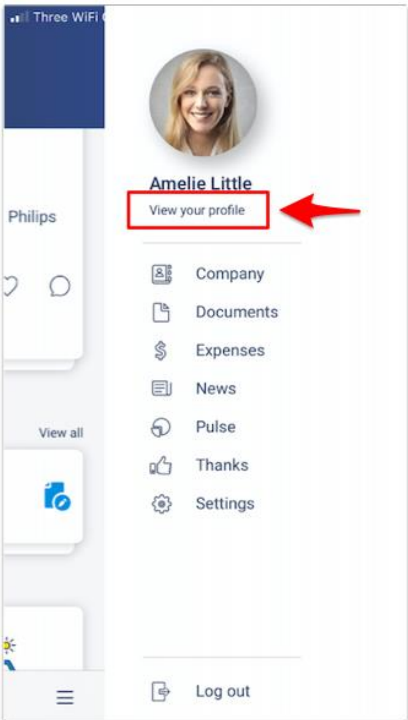




Personal profile and editing your details

On the mobile app, employees can update some of their personal details. This includes:

- Bank details
- Contact details
- Emergency Contacts



To do this:

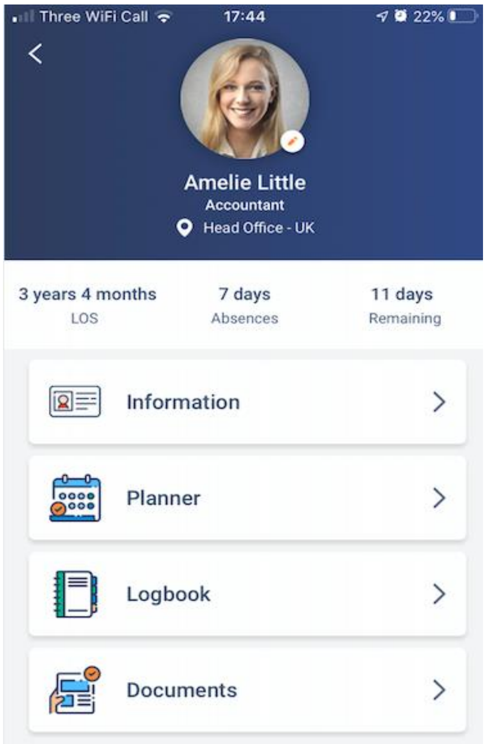
1. Click the main menu and select 'View your profile'

2. Here you have your information separated into different tabs:

- Information
- Planner
- Logbook
- Documents

Much like the desktop version, there are some pieces of information you can edit and other areas you cannot - these boxes will be greyed out.

What you can edit may also depend on your system settings. If Admins have allowed employees to ed their profile picture, you will have a pencil icon next to it that you can click to edit.



Personal tab - contains personal information, contact information, bank details and emergency contacts.

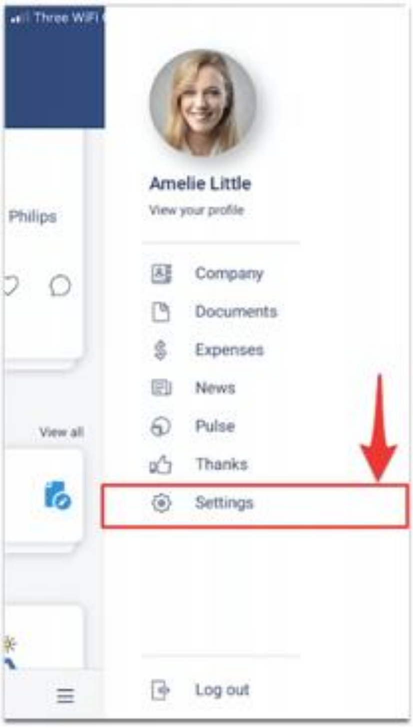
Planner tab - will take you to your personal planner, where you can view all of your events, as well as book holidays & other events, and add time sheets.

Logbook tab - is your own logbook area. You can view your own logbooks here, create new ones and edit your existing screens.

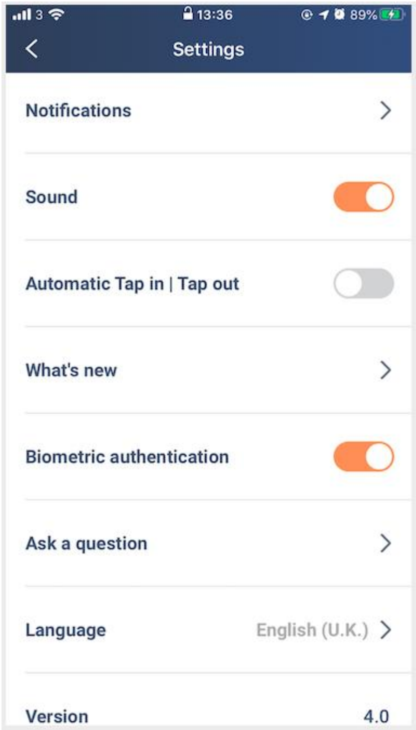
Documents tab - contains all of your personal documents. You will be able to view all of your documents that you have access to and sign any pending documents.

Settings and notifications

You can access the settings via the main menu.



You will then be presented with this screen:



Notifications - Here you can specify which areas you want to be notified for. You can also specify your working hours so that you will not be notified outside of your working time.

Sound - This toggle is responsible for the tapping noises you will hear when flicking through the app.

Automatic Tapin|out – Select whether you want to tap in manually or automatically. Use our help site to learn more about Tapin|out and whether you'd prefer automatic or manual.

What's new - This will take you to our news page, keeping you updated with all new releases.

Biometric Authentication - Select whether or not you wish to use your mobile's biometrics for additional security (Face ID, fingerprint, special code etc.)

Ask a question - Click this option takes you to a chat with our support team.

Language - Edit your language here.