Employee Walkthrough

Version 1.0

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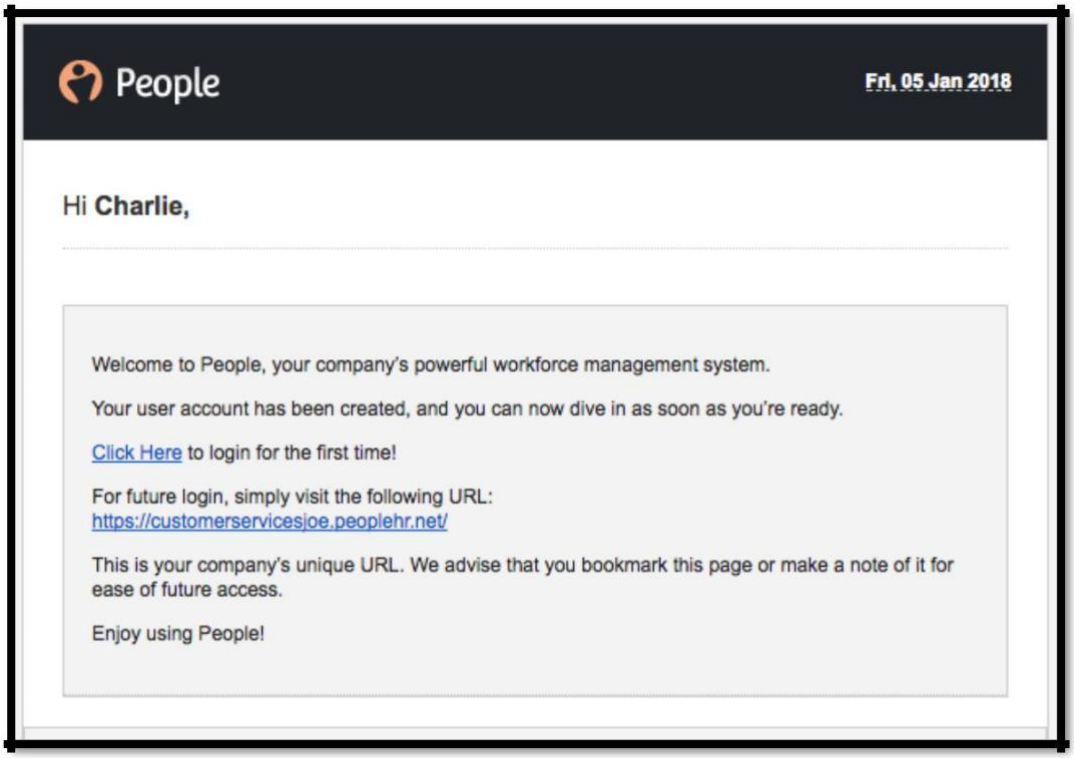
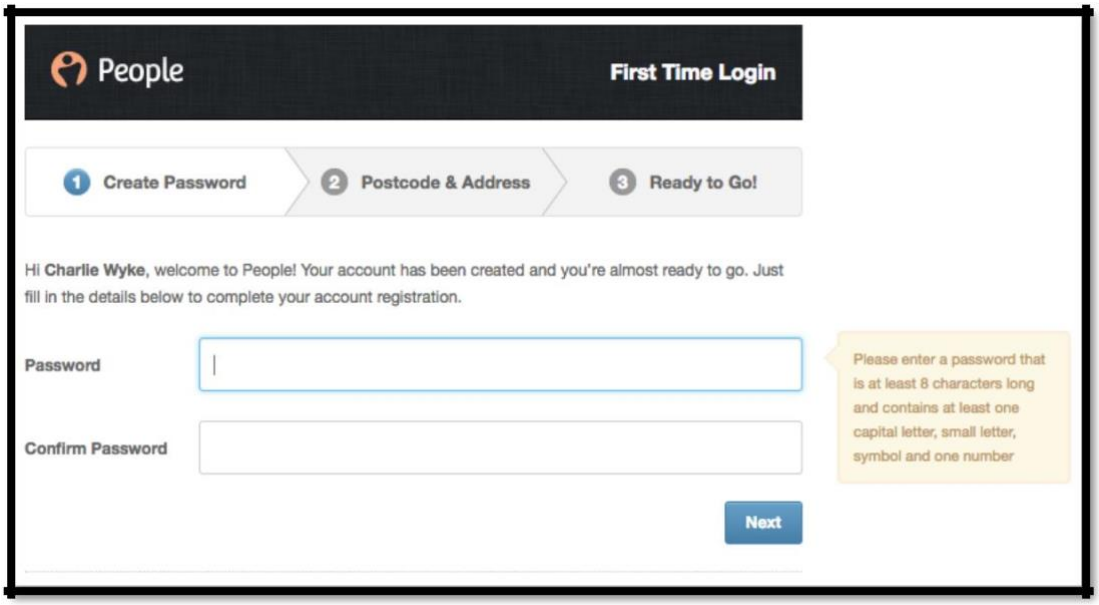
Welcome Email



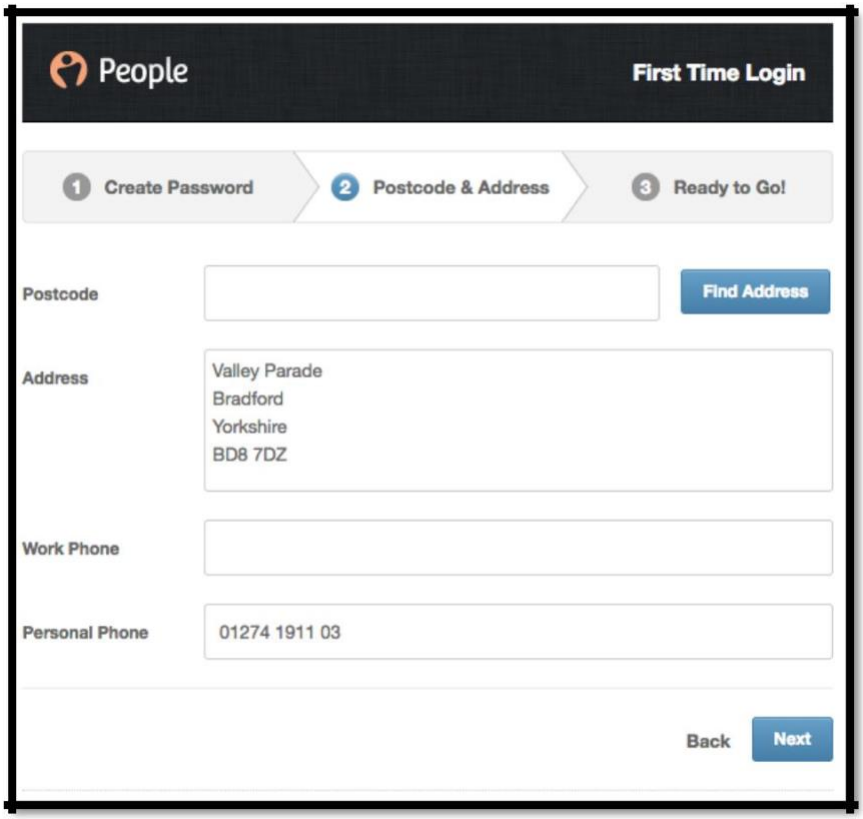
When your company launch your new HR system, the first thing you will receive is a welcome email. From this you can click to log in for the first time and create a password. It also contains your People URL for future access.

Creating a Password



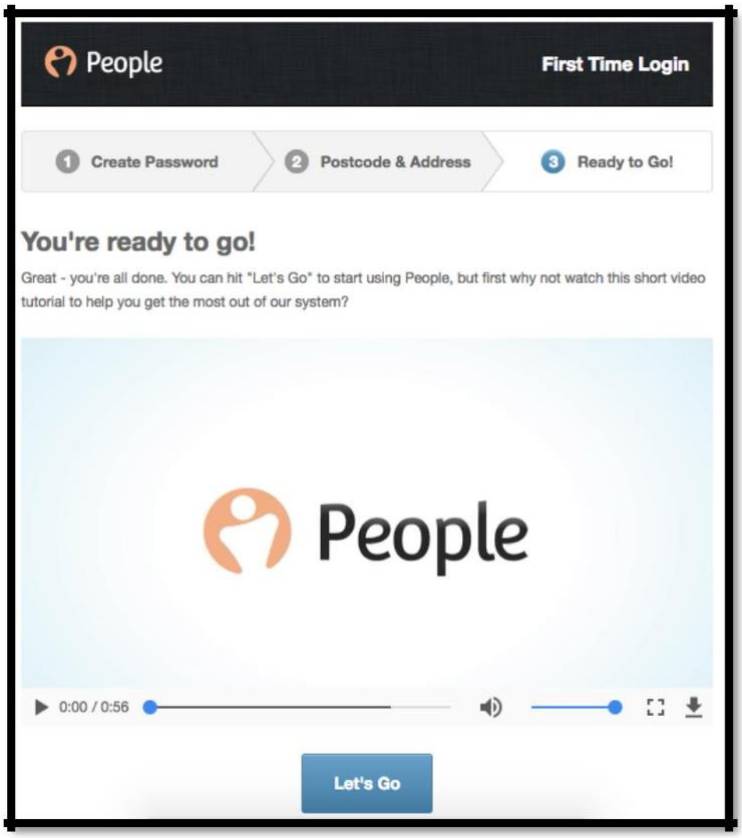
You will now need to create a password for your login credentials. The password will need to be at least 8 characters long and must contain at least: one capital letter; one small letter; one symbol; and one number.

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

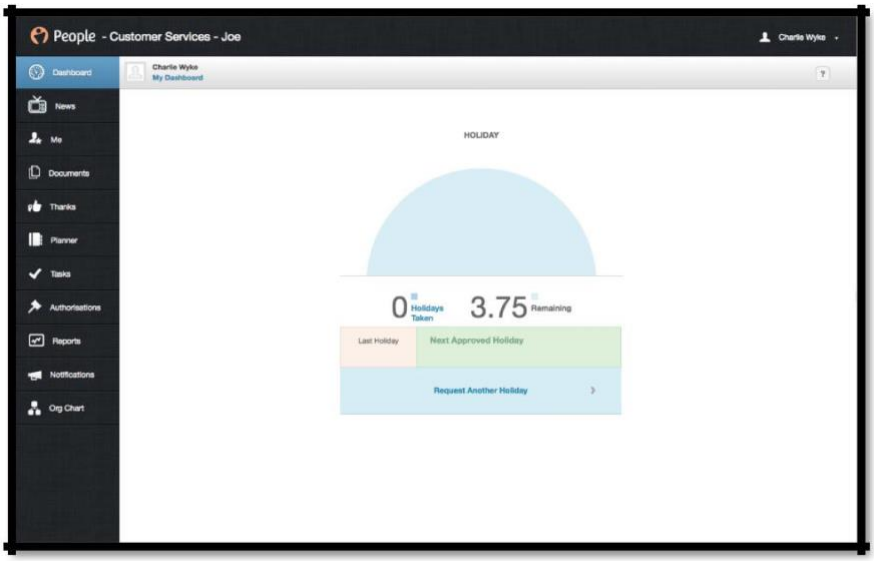


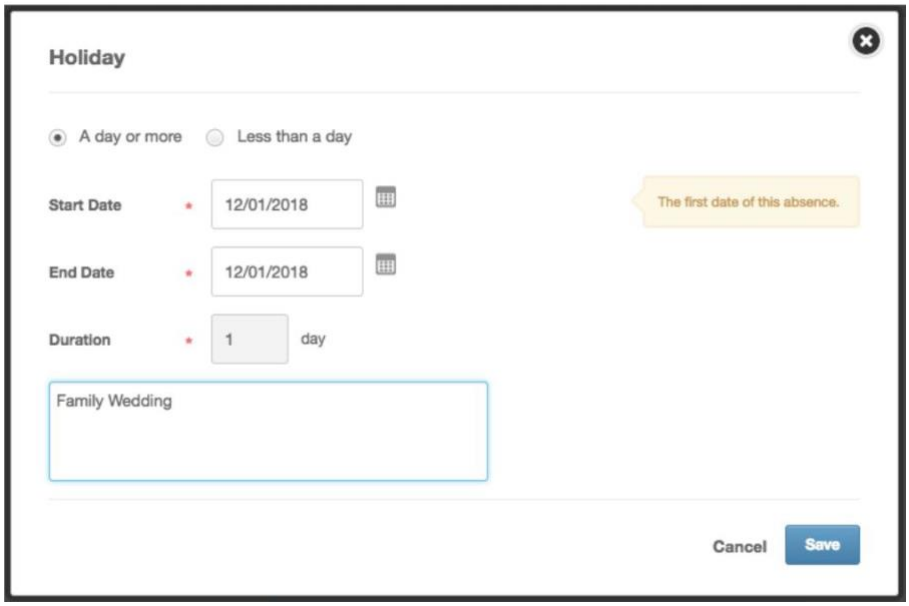
You are now ready to go. There is a short tutorial video to give you some insight into the system, but once you are ready press Let's Go and you will now log into your People system.

Dashboard

The first tab you will see within People is your Dashboard. From here you are able to book annual leave. Click on the Request Another Holiday and it will allow you to book your requested days.

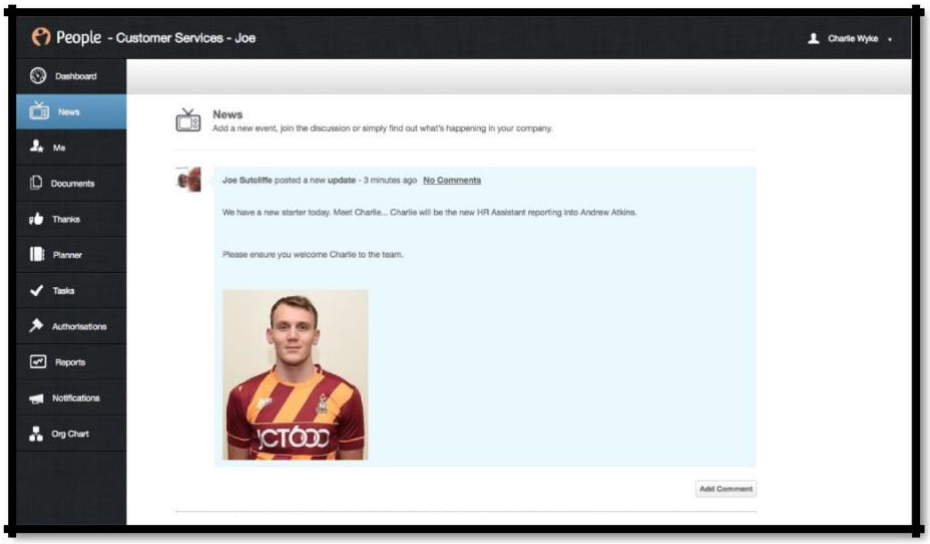
You can then select your required days, whether it's a day or more or less than a day and add any comments.





News

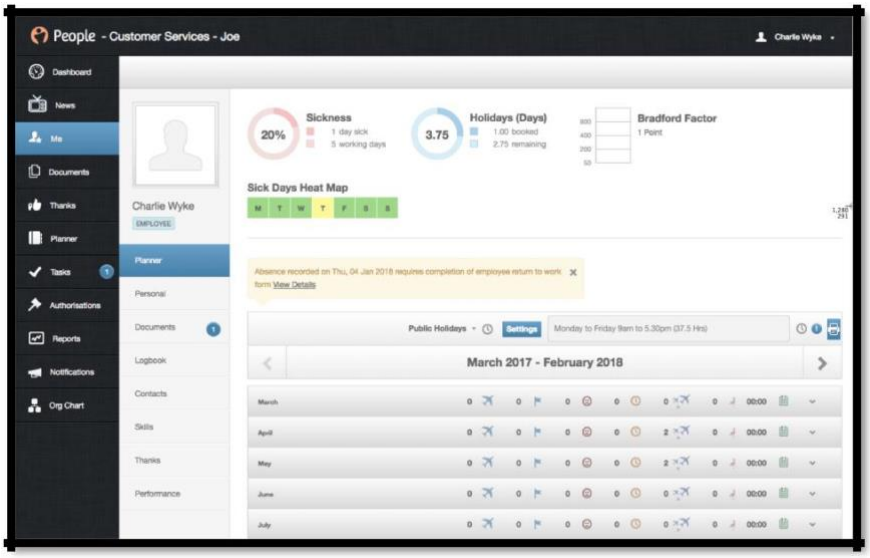
Your system administrators may have enabled a news feed within the system. This will show any relevant news published to your department, location or company. You may receive an email when important news has been produced and you may be allowed to comment on the news.



Me

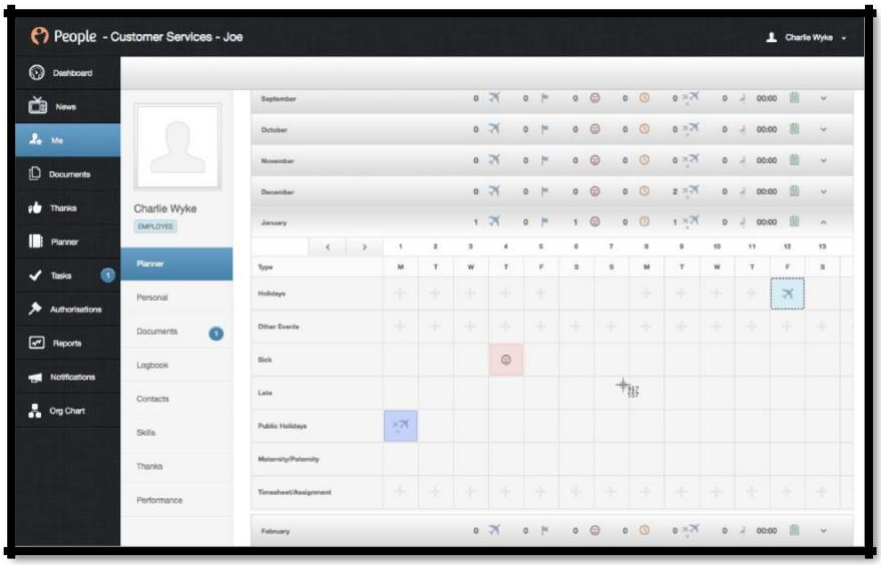
From your Me tab you can access your own record. You can view your personal information, book holidays and amend your contact information.

Planner

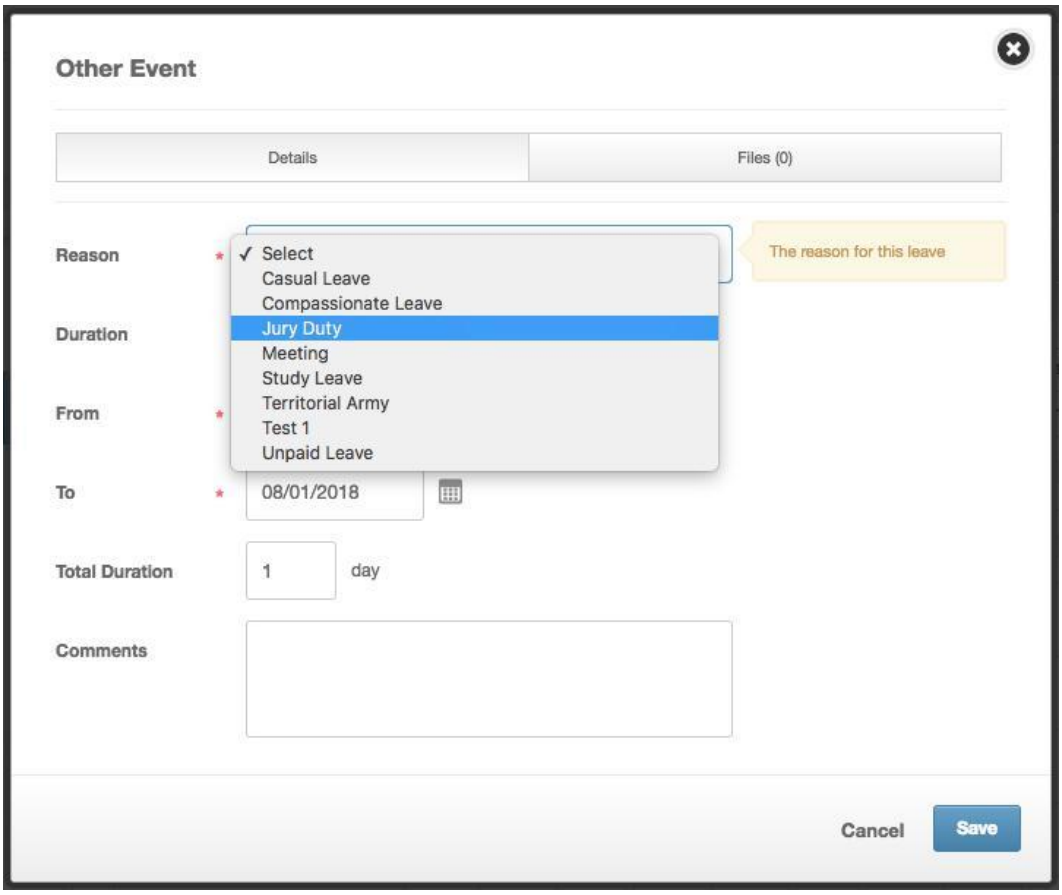


Within your Planner, you can view your attendance information. You will be able to see your sickness percentage, annual leave entitlement, Bradford Factor score and Sick Days Heat Map.

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



Booking Annual and/or Other Leave

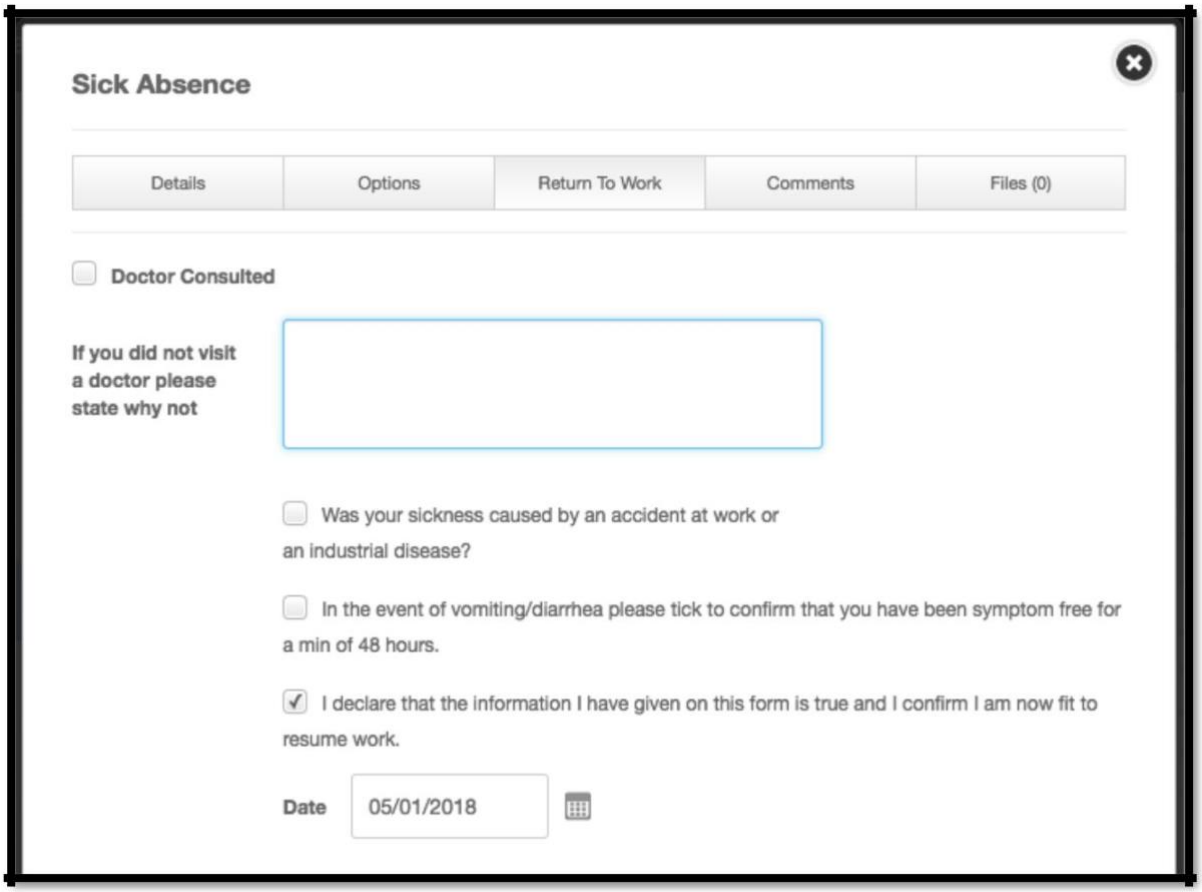


To book annual leave or other leave, click on the plus on the corresponding row and date. Annual leave can be booked within your dashboard. To book other leave, you will need to select the relevant reason from the dropdown, enter the from and to dates and any comments. You can also add files into the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

Filling a Return to Work

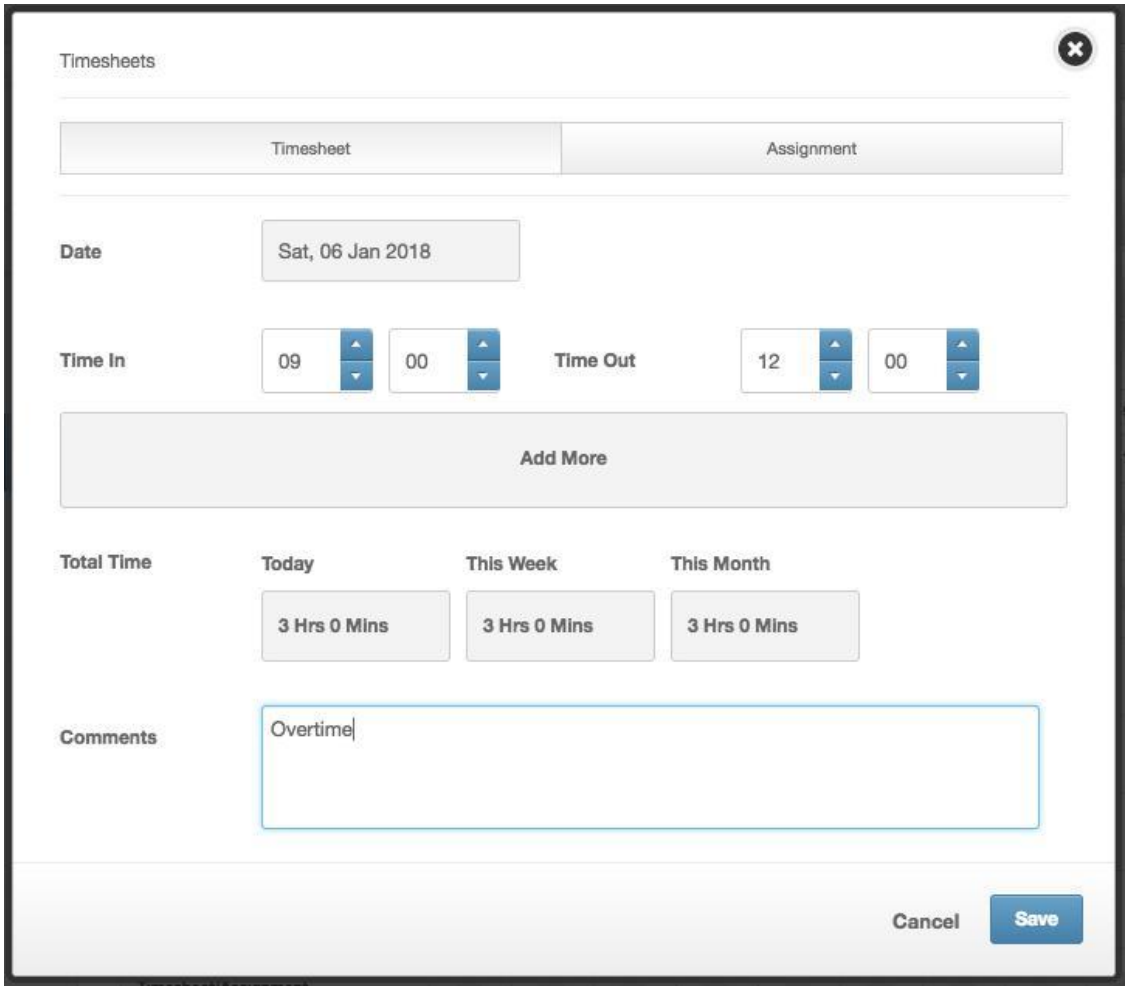
As part of your company's sickness policy, you may need to fill in return to work forms as part of your absence. If you click into the existing spell of sickness, within the Return to Work form you are able to answer the necessary questions as part of your return to work.

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



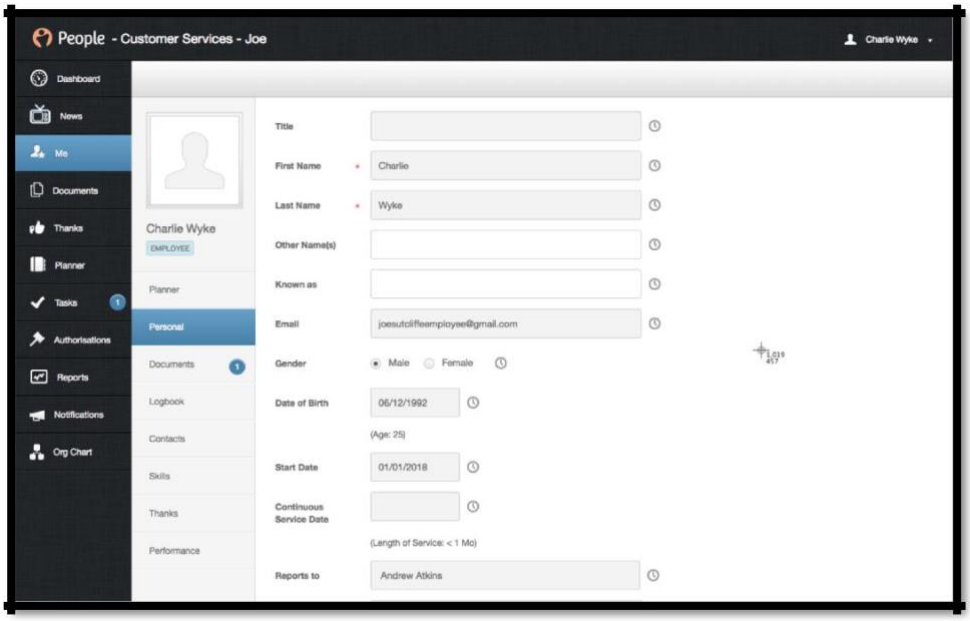
Timesheets/Assignments

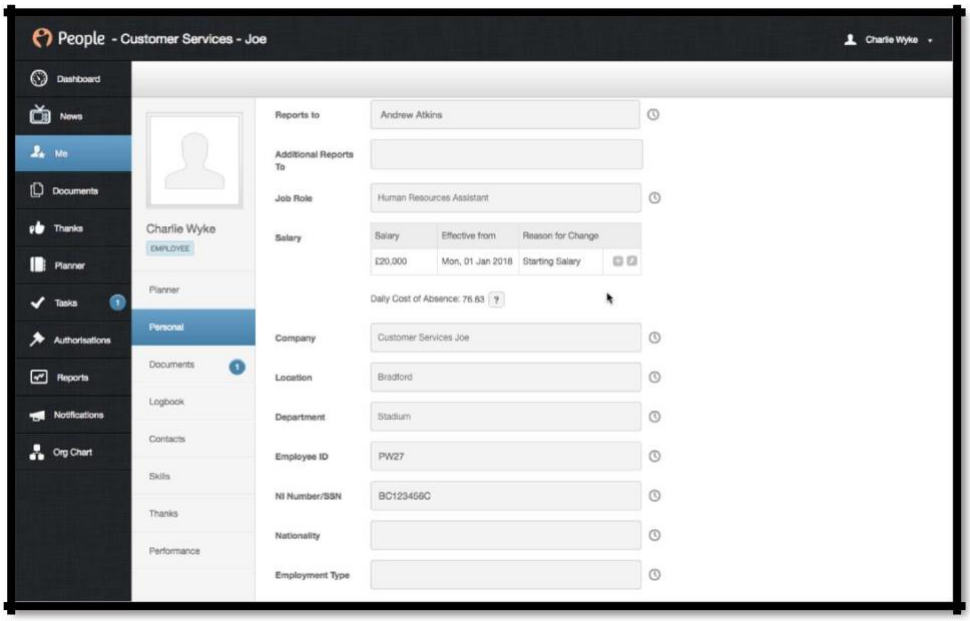
Within your planner you can also log timesheets and assignments. Depending what guidelines your HR team advise, these could be used to log your time in and out of work or any assignments you may have worked on.



Personal

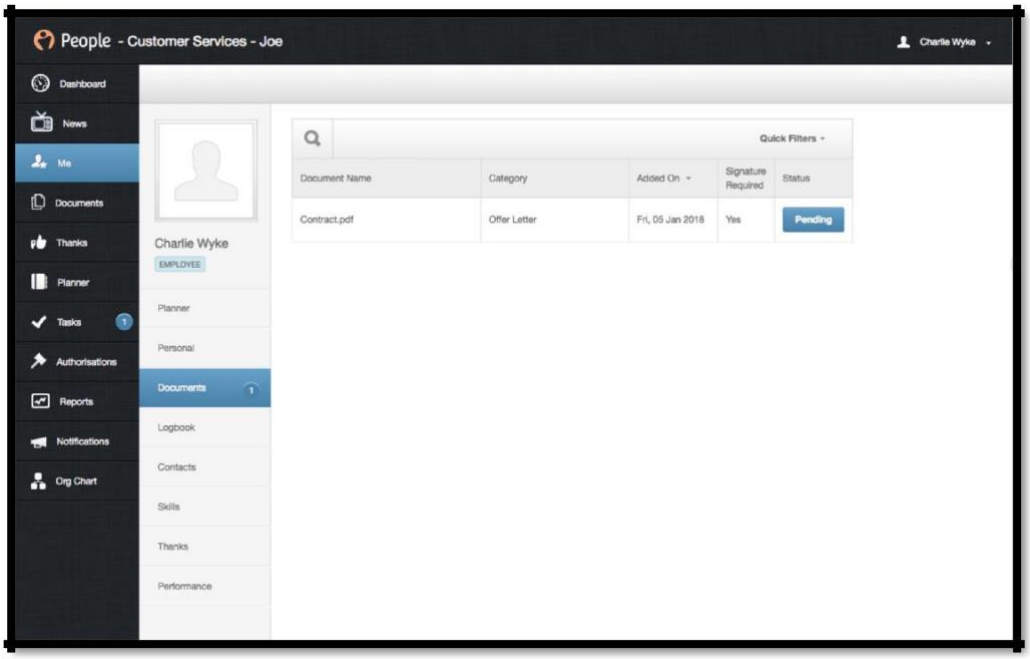
On your Personal tab you can view your job information, your salary and if your system administrators permit you, you can also upload your own photo.



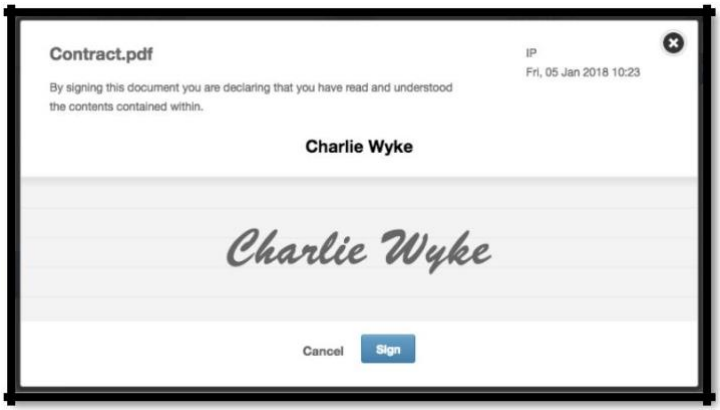


Documents

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

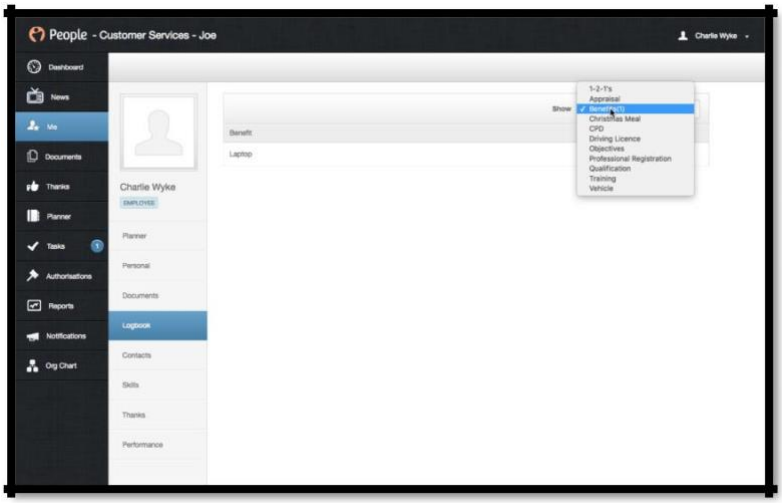


You may also be asked to sign certain documents within your documents tab. If you see that a signature is required, you are able to click the pending and electronically sign documents.



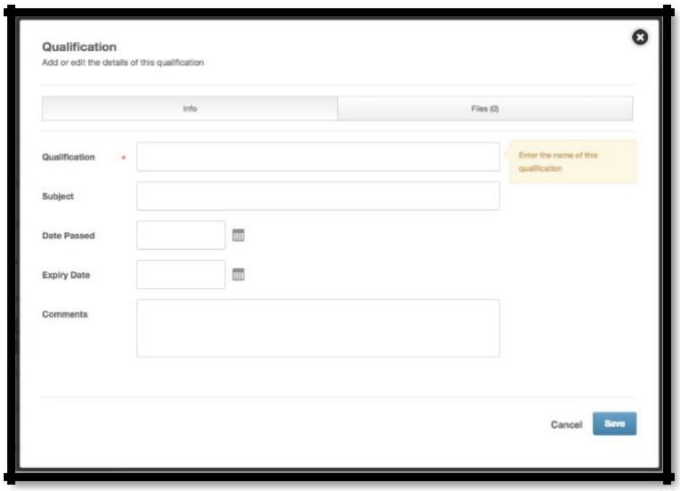
Logbook

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



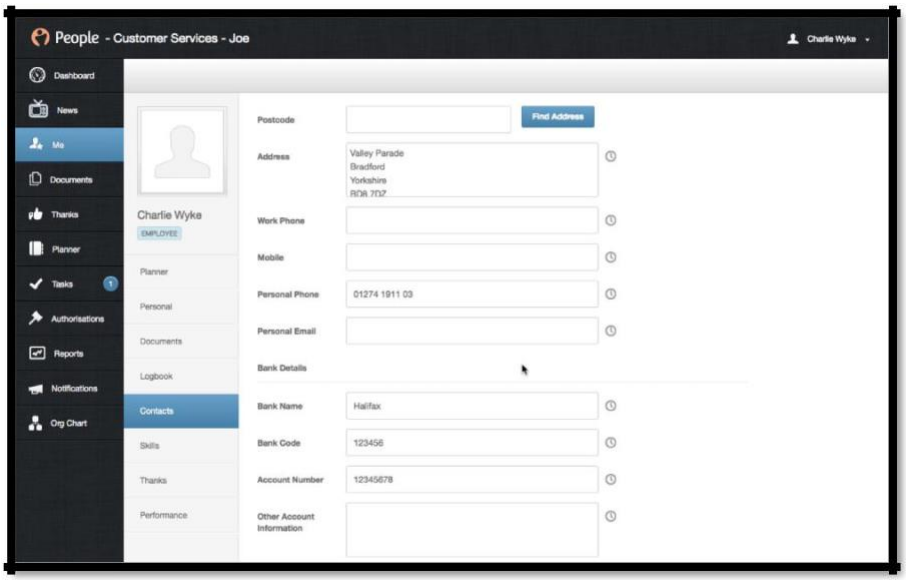
Some of these logbooks you may be able to fill out yourself, whereas others may only available for your HR team to record the detail.

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.

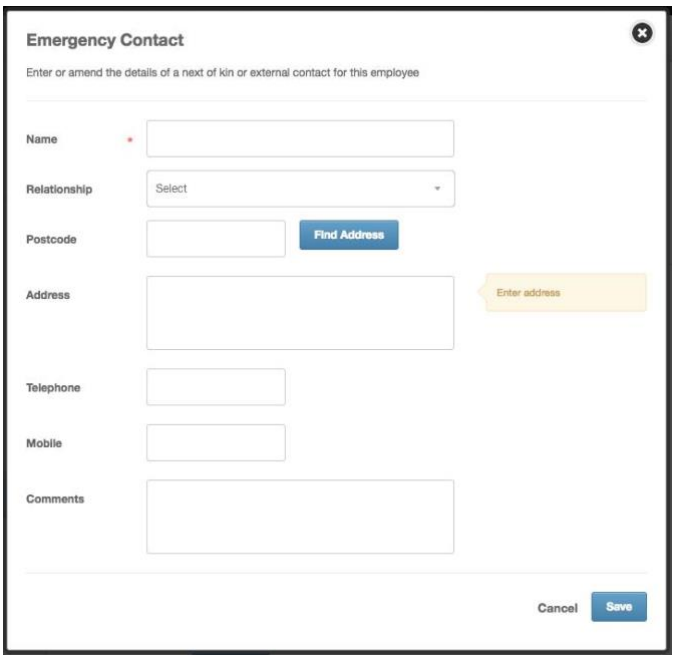


Contacts

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.

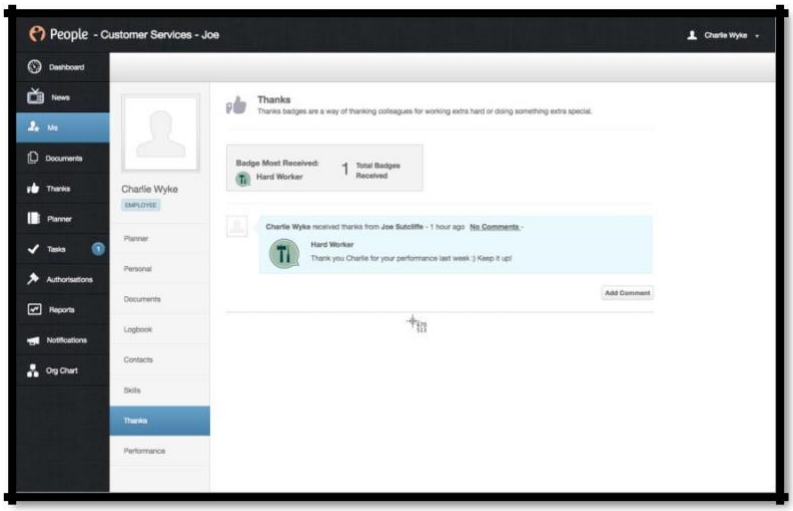


At the bottom of the contacts tab, you are also able to add your emergency contact details.

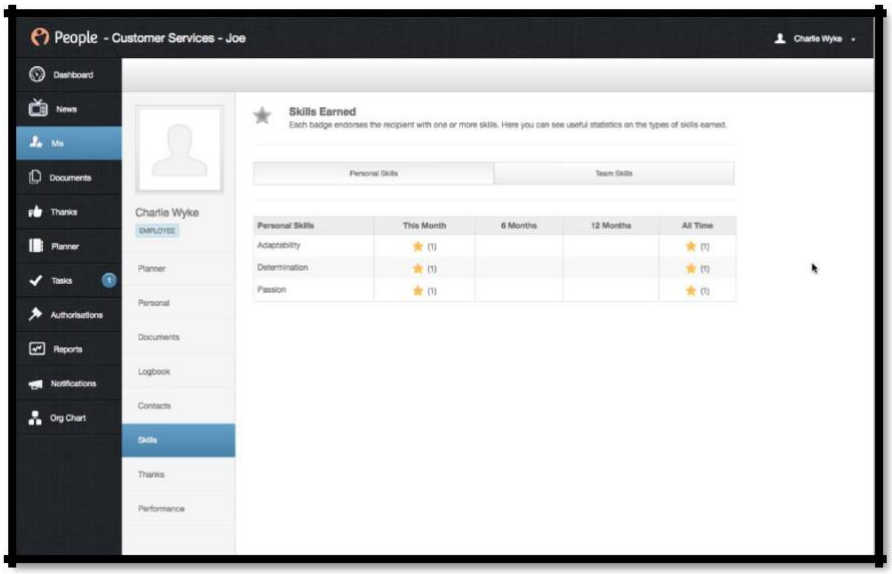


Skills and Thanks

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.



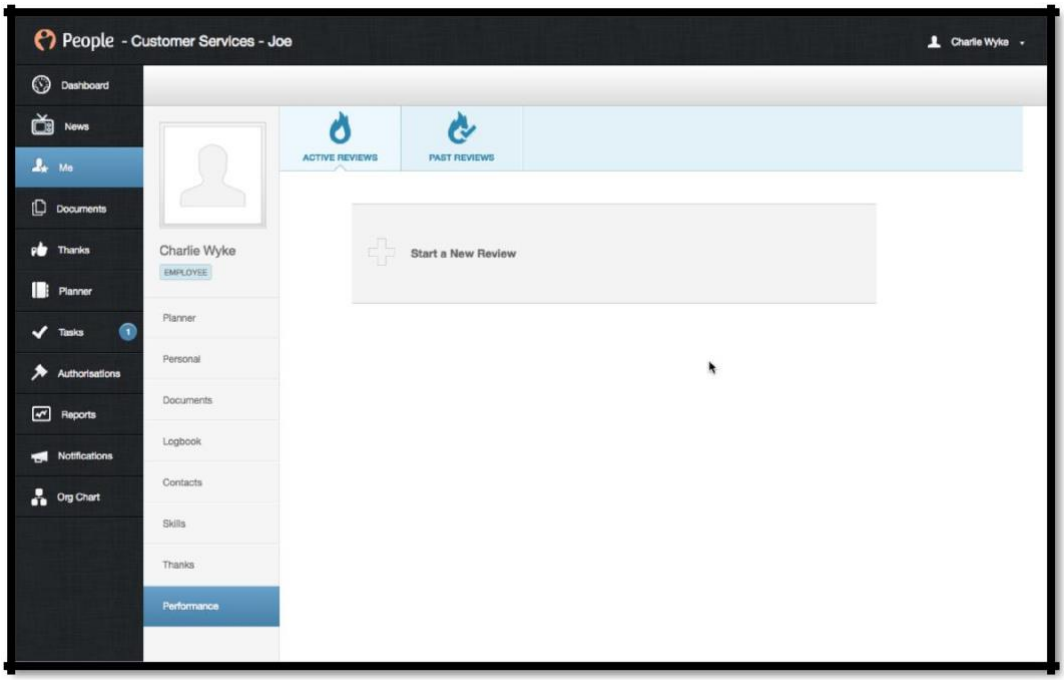
Any thanks badge(s) you received will link to a particular set of skills in the system. From the Skills tab, you are able to view which Skill points you have received.



Performance

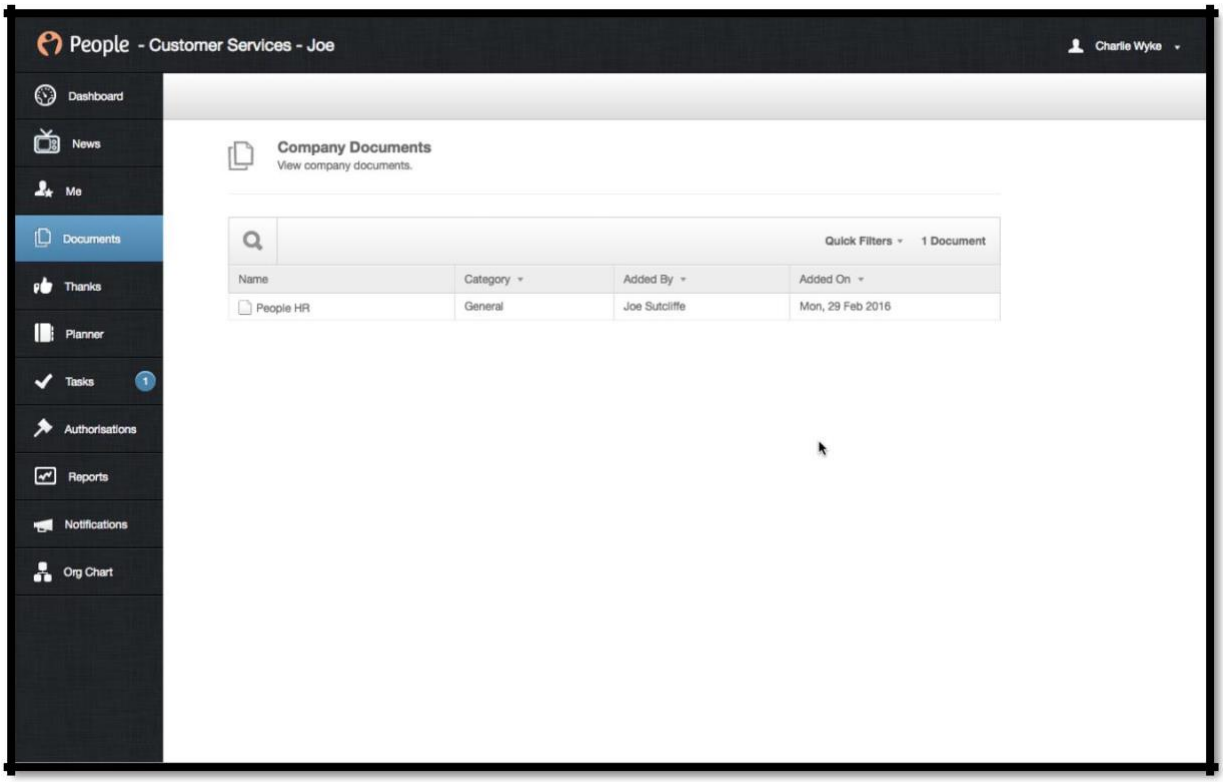
Your company may have a performance module. From here you can undertake performance reviews and submit feedback to your managers.

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



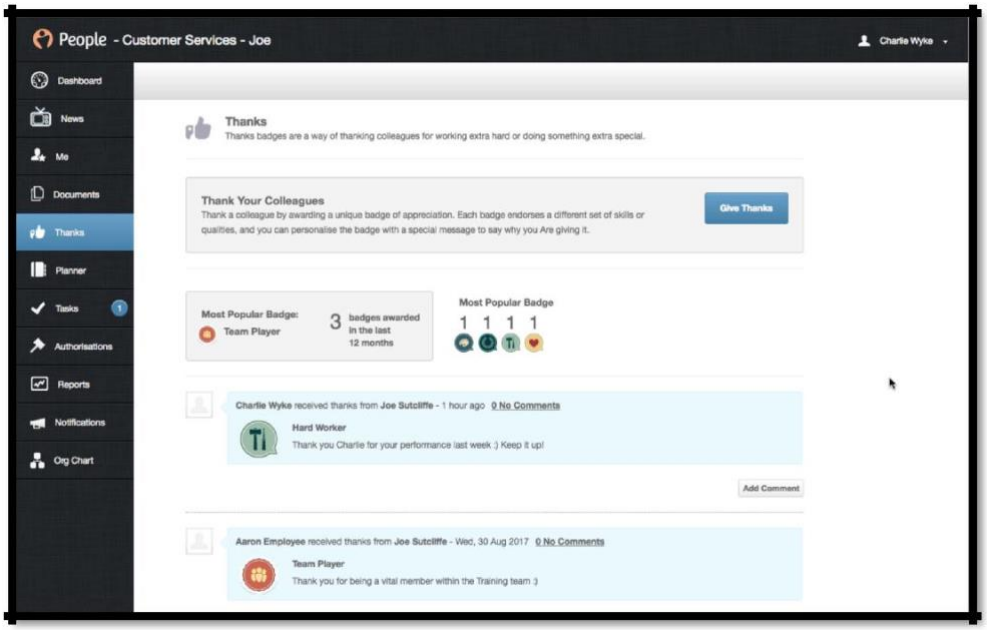
Company Documents

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 People App.

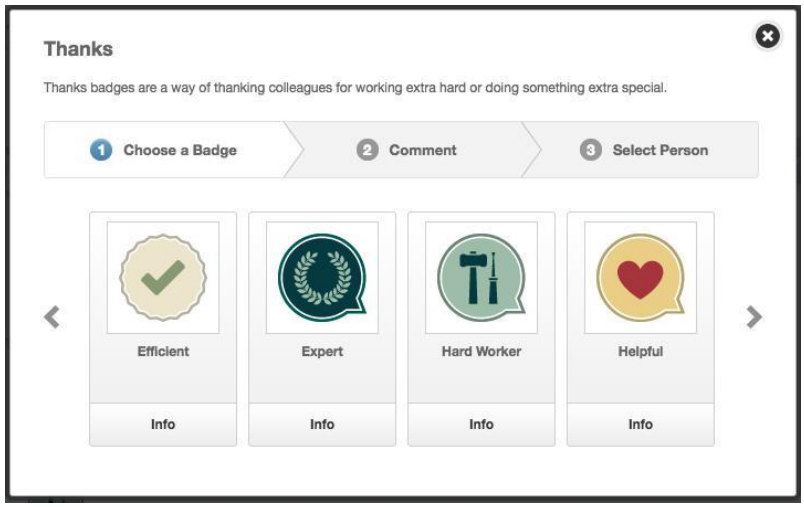


Thanks

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

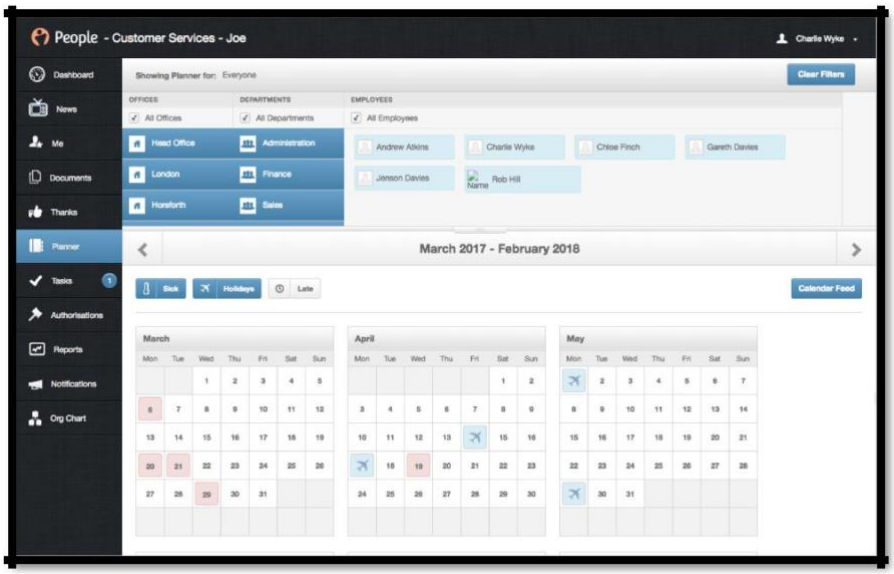


To Thank one of your colleagues, press the Give Thanks button. You can then select a badge, give comments and select which employee(s) deserve(s) this Thanks.



Planner

You will also be able to see a planner. This will show Holidays 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.

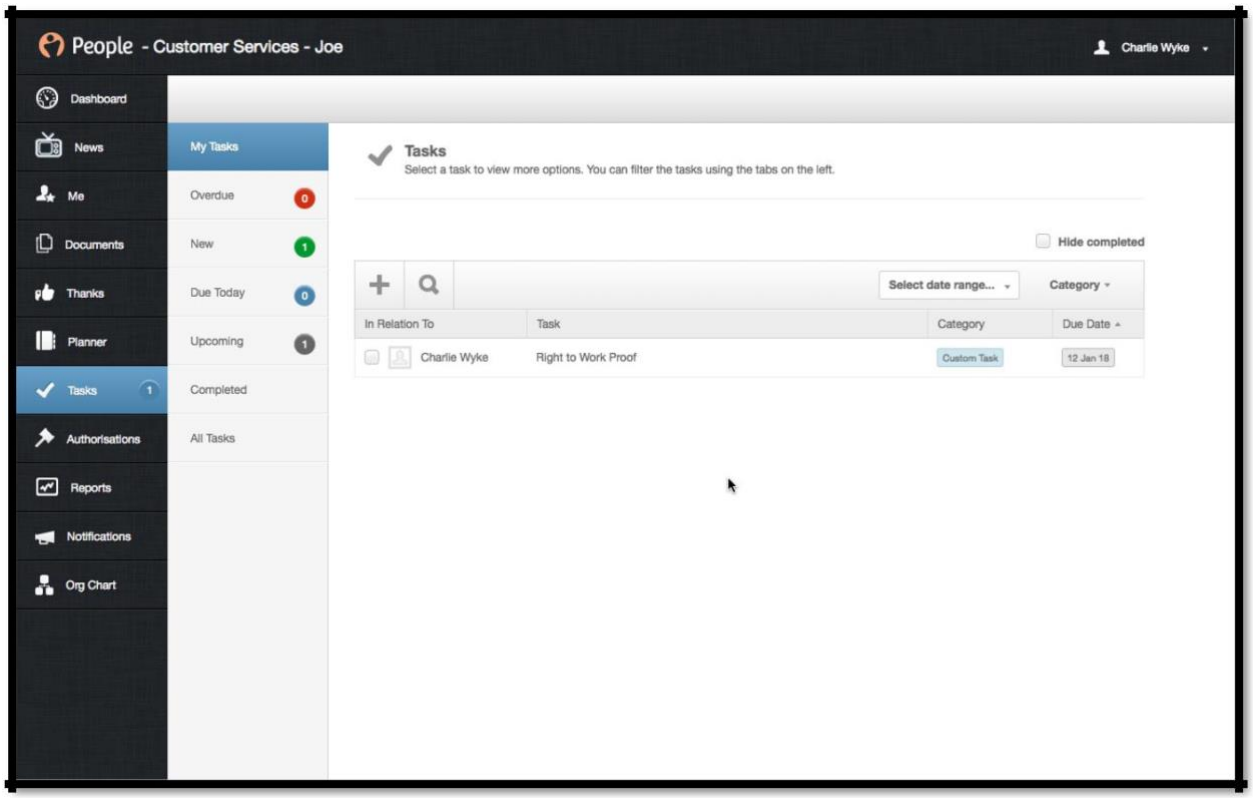


The planner may work in the form of a heat map. This will explain why different days are showing in different colours. The key to which is explained here:

- Red - Over 10%
- Yellow - Over 5%
- Green - Over 3%
- Blue - Over 1%
- White - no transactions

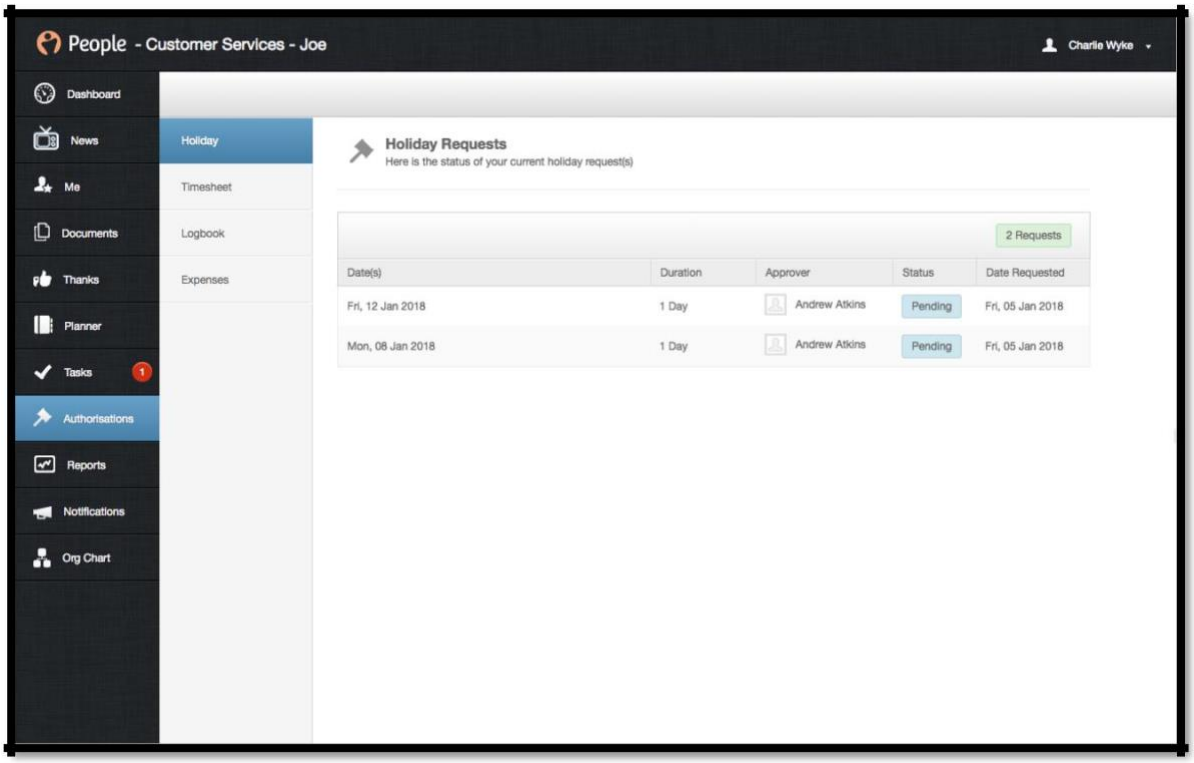
Tasks

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.



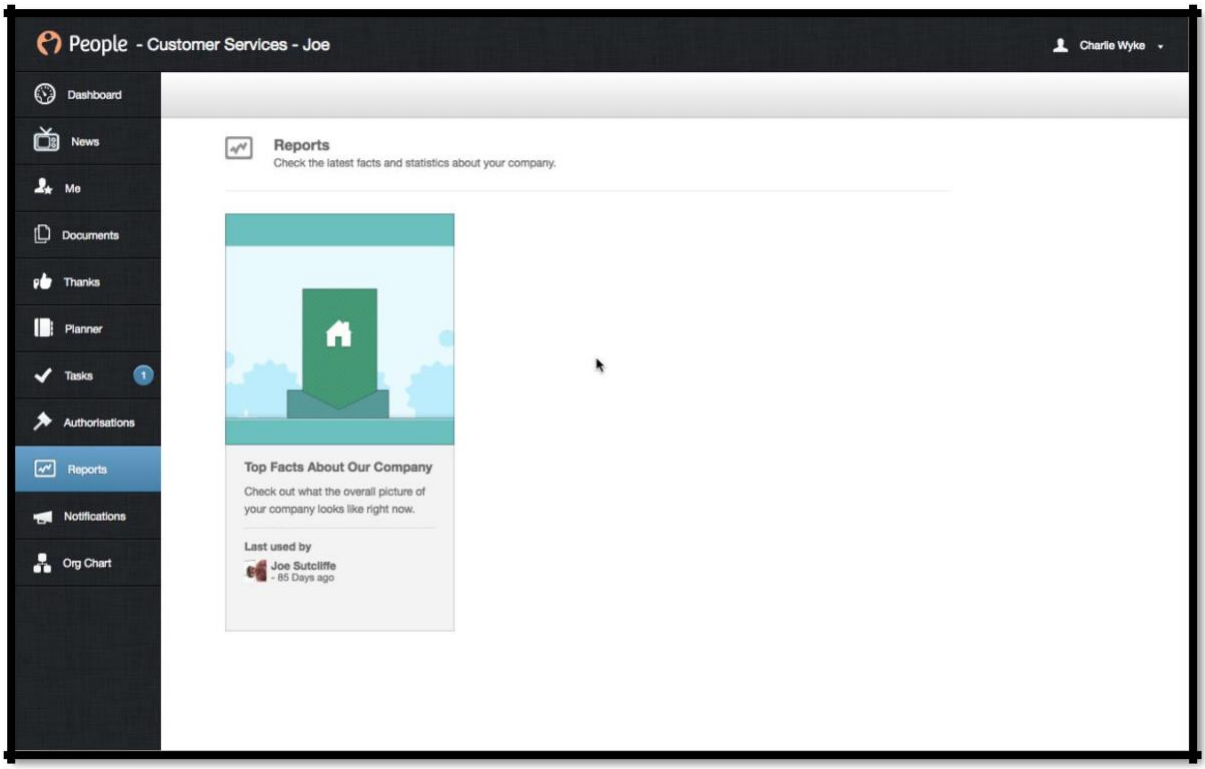
Authorisations

From your Authorisations screen, you can view the status of any requests you make in the system. These could be in the form of holidays/other events, timesheets, logbooks and expenses and whether they have been approved or declined or are still pending.



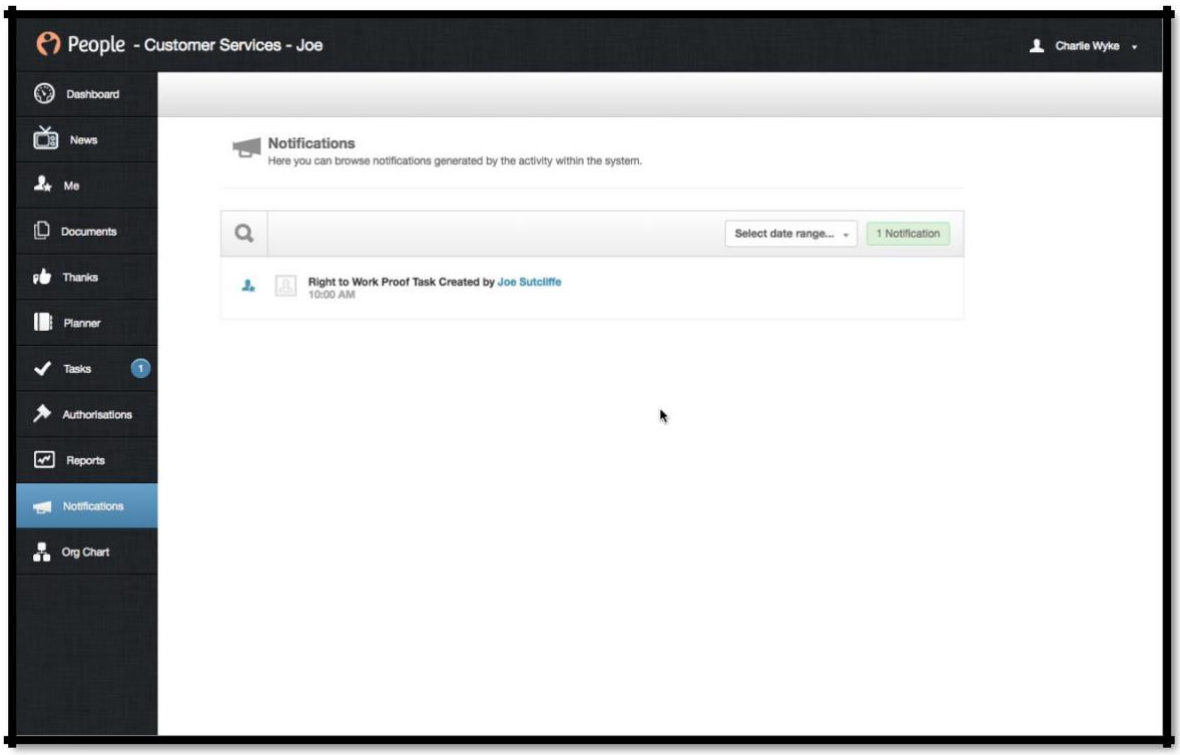
Reports

You may also have access to one report in your Reports tab. This will show the Top Facts about your Company. Simply click on the report to run.



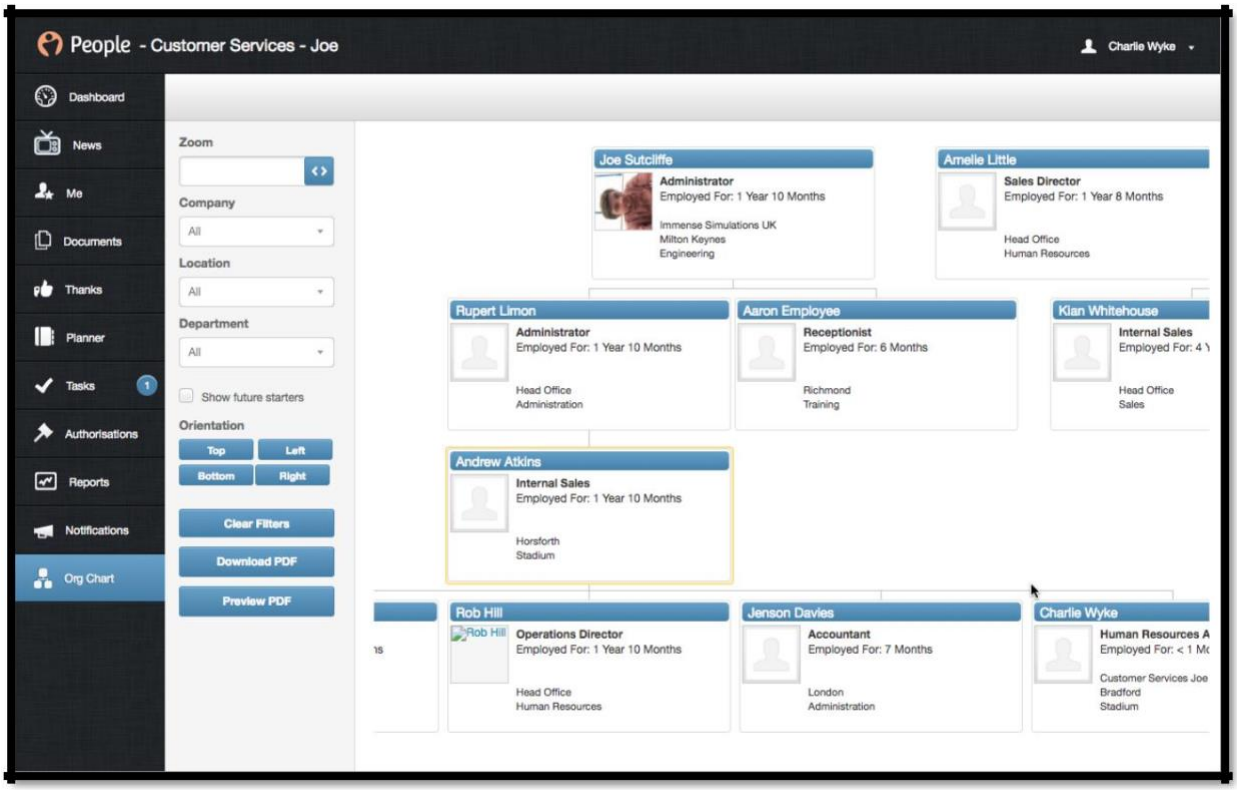
Notifications

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



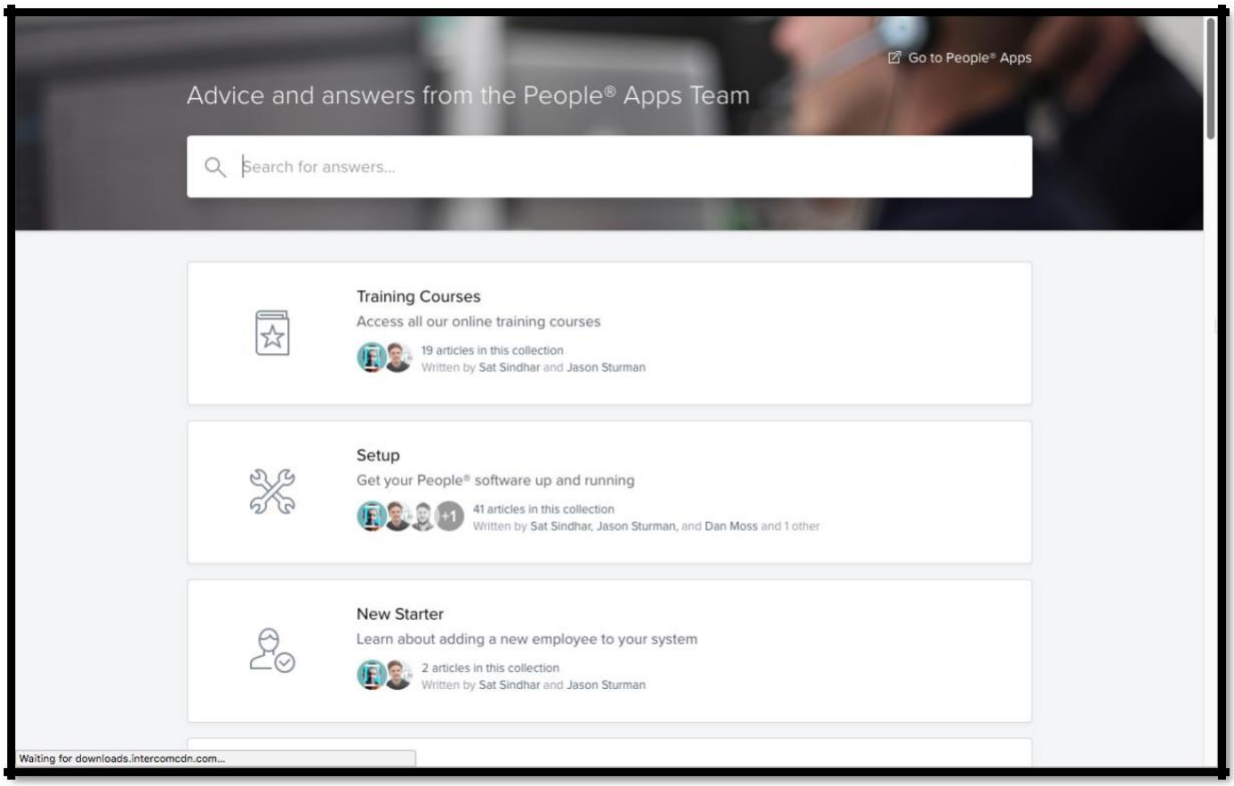
Org Chart

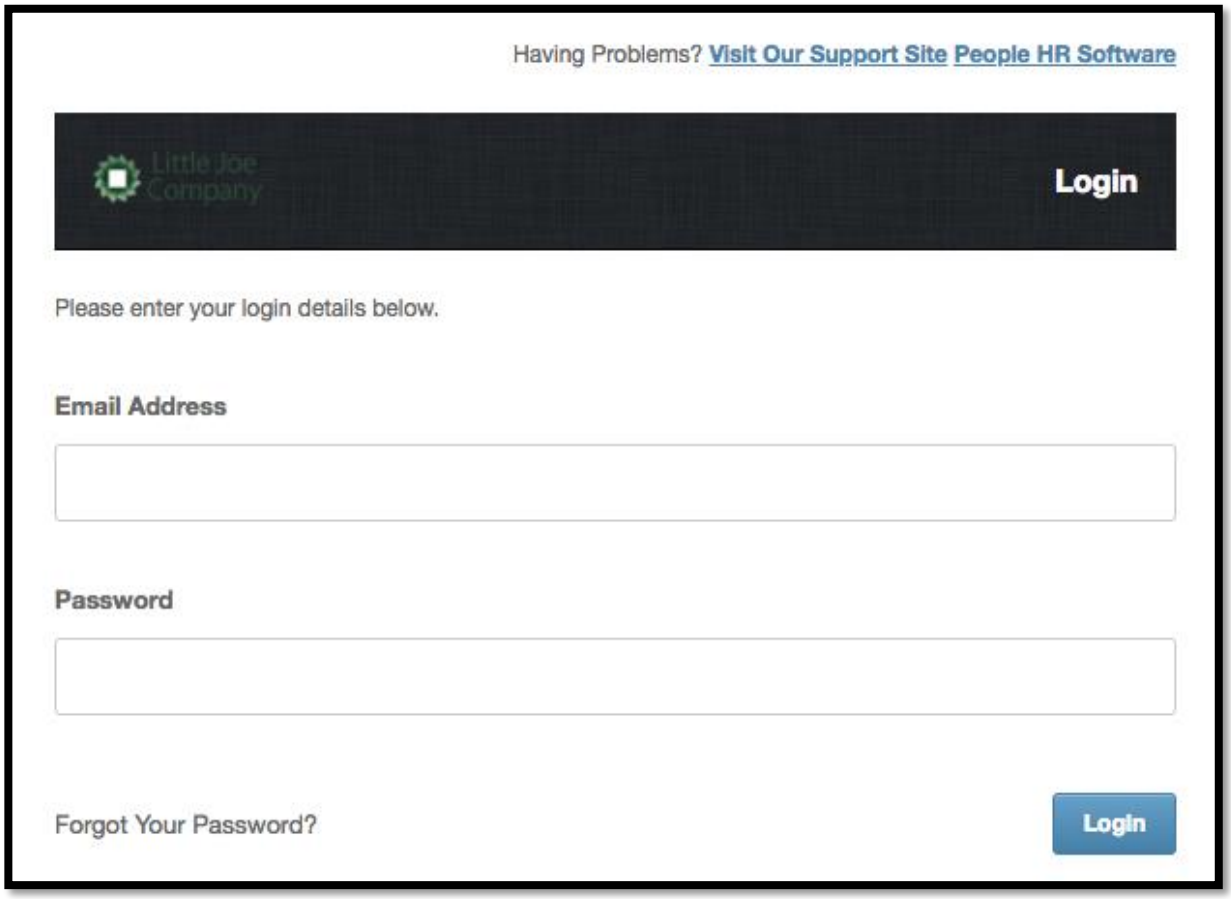
The organisation chart will show who reports to who in your company. You can use the zoom feature, filter by companies, locations and departments and are also able to export the org chart to a PDF.



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.