

# Chapter 3: Setup and Configuration of People Management

Before the **People Management** module can be fully used, it must be properly configured to align with the company's policies and structure. This setup phase ensures that the **Organisation Structure**, access permissions, and data fields are tailored to meet business needs.

This chapter covers the essential steps for configuring the module, including setting up user roles, defining reporting lines, and customising data fields to capture relevant employee information. It also provides guidance on integration with other modules, such as **Organisation Structure**, **Learning Management**, and **Performance Management**, to create a seamless experience.

Proper setup is crucial for ensuring that the **People Management** module functions effectively. By following best practices, companies can streamline processes, maintain data accuracy, and optimise HR operations.

- [Prerequisites for this Module](#)
- [People Management Implementation Guide](#)

# Prerequisites for this Module

The **People Management** module is essential for setting up other modules in the system. Therefore, the only prerequisite for the **People Management** module is to configure the email server if the default Signify email server is not used for notifications. This is explained in the [Ruleset Setup](#) guide.



# People Management Implementation Guide

**People Management** is a system that contains profiles of all individuals within an organisation. Each person has a unique profile that can be updated and managed as needed.

Users can view others' profiles within their team, department, and the entire company, as well as update their own profile.

**People Management** also allows users, such as administrators, to have elevated rights to perform their daily tasks effectively. Additionally, **People Group** access enables the management of individuals within a designated group.

The following section provides a step-by-step outline for implementing **People Management**.

The screenshot displays the 'People Management' software interface. At the top, there is a search bar with the text 'Search here...' and a dropdown menu. Below the search bar, there are navigation tabs: 'MY TEAM', 'MY DEPARTMENT', 'MY COMPANY', and 'VIEW/EDIT PEOPLE'. A dropdown menu shows 'in: All People'. To the right, there are view options: 'CARD VIEW' (selected) and 'GRID VIEW'. Below these, there are filters for 'ACTIVE' (30), 'FUTURE DATED', 'TERMINATED', and 'ALL'. The main area shows a grid of employee profiles, each with a circular profile picture, name, title, and a 'Kudos' button. The profiles are:

- Charlene Britton, Learner
- Aimee Campbell, Chief of Operations (COO)
- Emily Collins, Development Manager
- Ephraim Doha, Junior Software Developer
- Isabella Domingo, Junior Software Developer
- Lisa Edwards, Senior Business Analyst
- Karabo Fweta, Scrum Master
- Kyle Gosling, Intermediate Business Analyst
- Abraham Hamman, Intermediate Business Analyst
- Diego Inez, Junior Business Analyst
- Isaac Jacobson, Technical Support Consultant
- Gabriella Josephs, Junior Business Analyst

At the bottom left, there is a '+ PERSON' button. The interface also includes a sidebar with various icons and a top navigation bar with a user profile icon.

# Step 1: Update the Master Data Library

The **Master Data Library** serves as the foundational control layer for all standardised organisational data used across the system. Its purpose is to ensure that key reference data are centrally defined, consistently applied, and tightly governed. Default values have been added to the **Master Data Library**, which can be used in **People Management**.

Master data types with defaults include:

- Asset Items
- Asset Types
- Citizenship
- Disabilities
- Genders
- Home Languages
- Initials
- Marital Statuses
- Permit Types
- Races
- Relationships
- Titles
- User File Categories



The screenshot shows the 'Master Data' interface. At the top, there is a search bar with the text 'Search here...'. Below the search bar is a table with three columns: 'TITLE', 'DESCRIPTION', and 'PRIMARY PRODUCT'. The table lists various data types and their corresponding primary products.

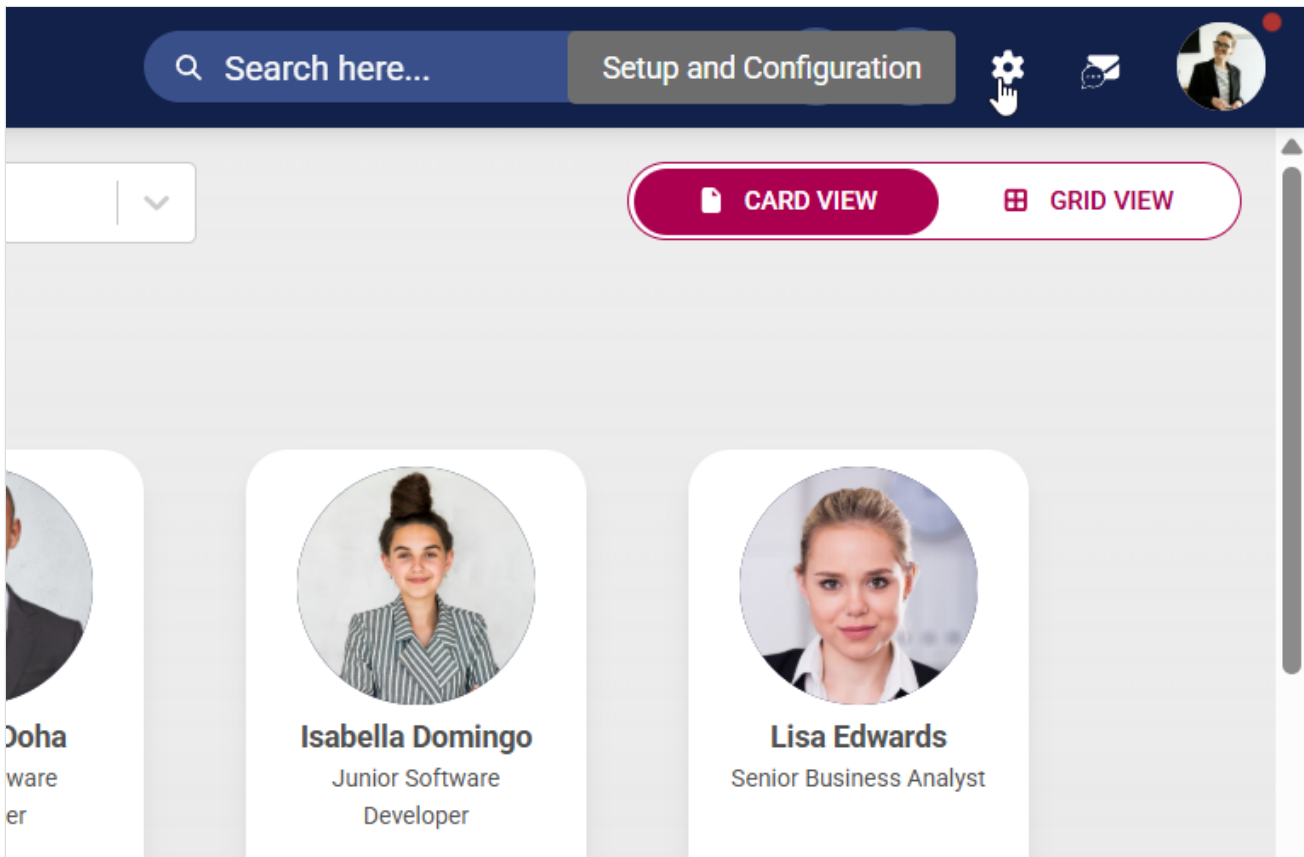
TITLE	DESCRIPTION	PRIMARY PRODUCT
Performance Management Section Items		Performance Management
Organisational Units		Job Profiler
Appointment Types		Job Profiler
Grading Scales		Job Profiler
Grading Types		Job Profiler
OFO Codes		Job Profiler
Occupational Categories		Job Profiler
Occupational Levels		Job Profiler
Termination Reasons		Job Profiler
Training Intervention Competencies		Job Profiler
Citizenships		People Management
Currencies		People Management
Disabilities		People Management
Genders		People Management
Home Languages		People Management
Initials		People Management
Marital Statuses		People Management
Permit Types		People Management
Races		People Management

Click [here](#) for details on how to update the **Master Data Library**.

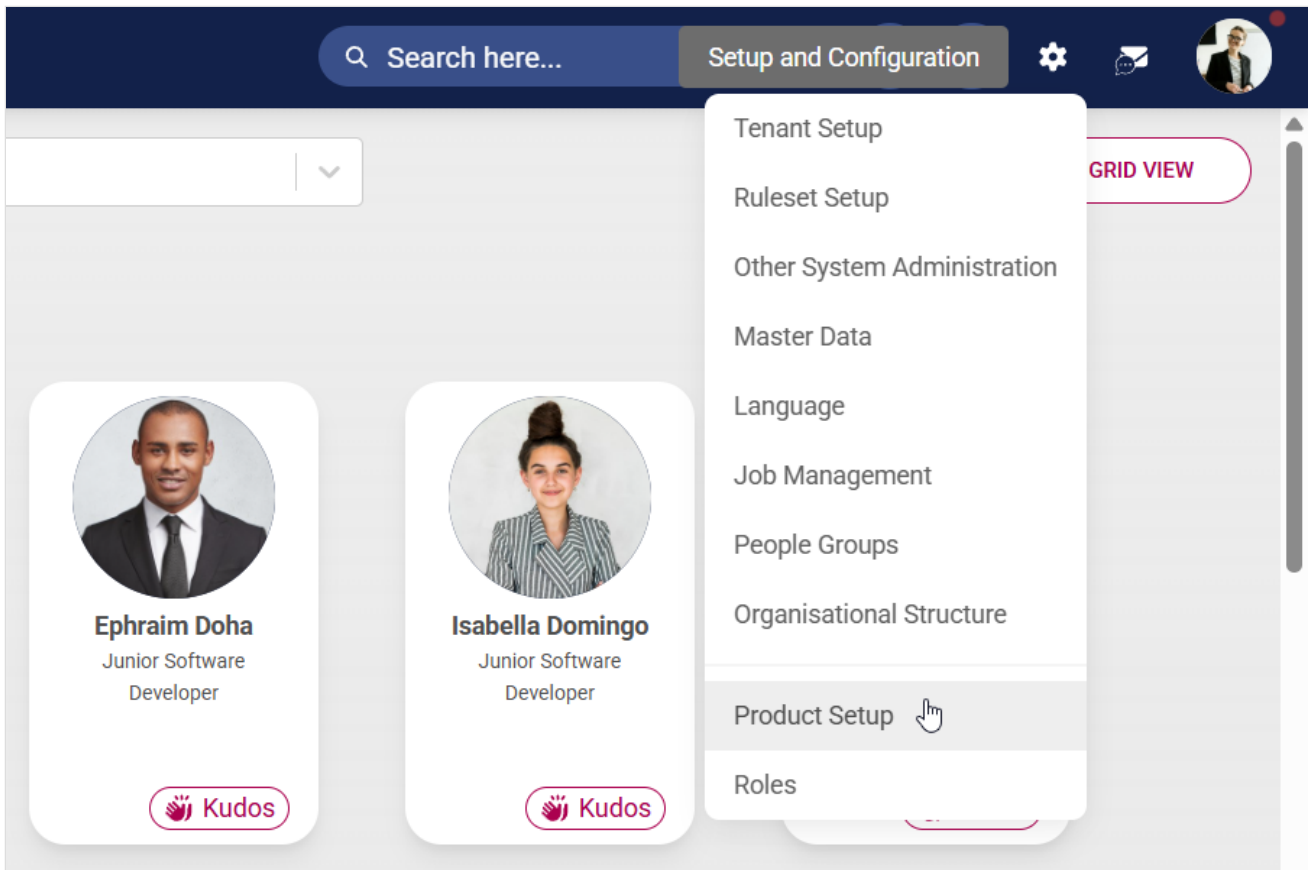
# Step 2: Manage the People Management fields

Data fields linked to **People Management** can be activated/deactivated as required. To configure these fields, we will use the **Product Setup** functionality of **People Management**.

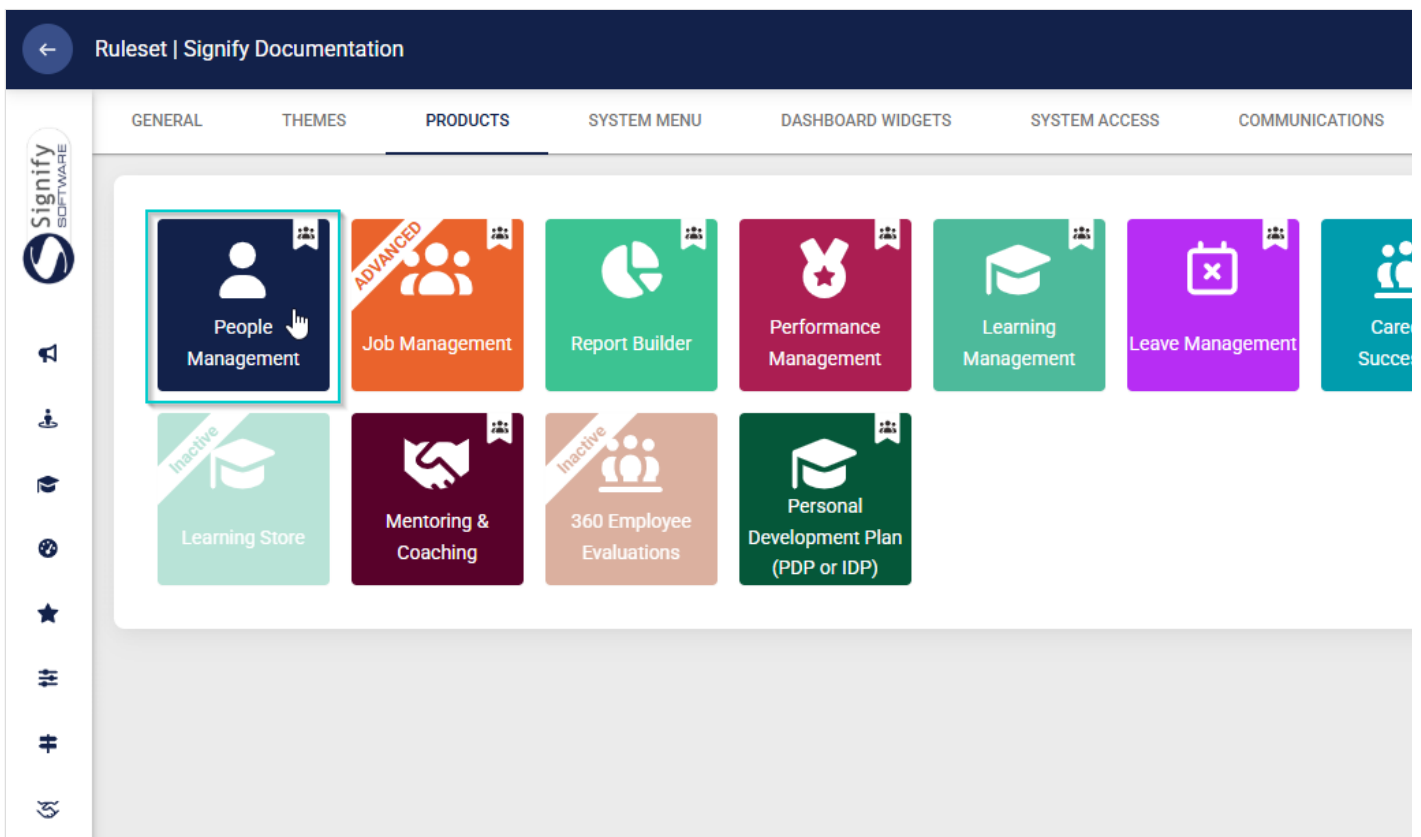
- Click the **gear icon** to access the **Setup and Configuration** menu.



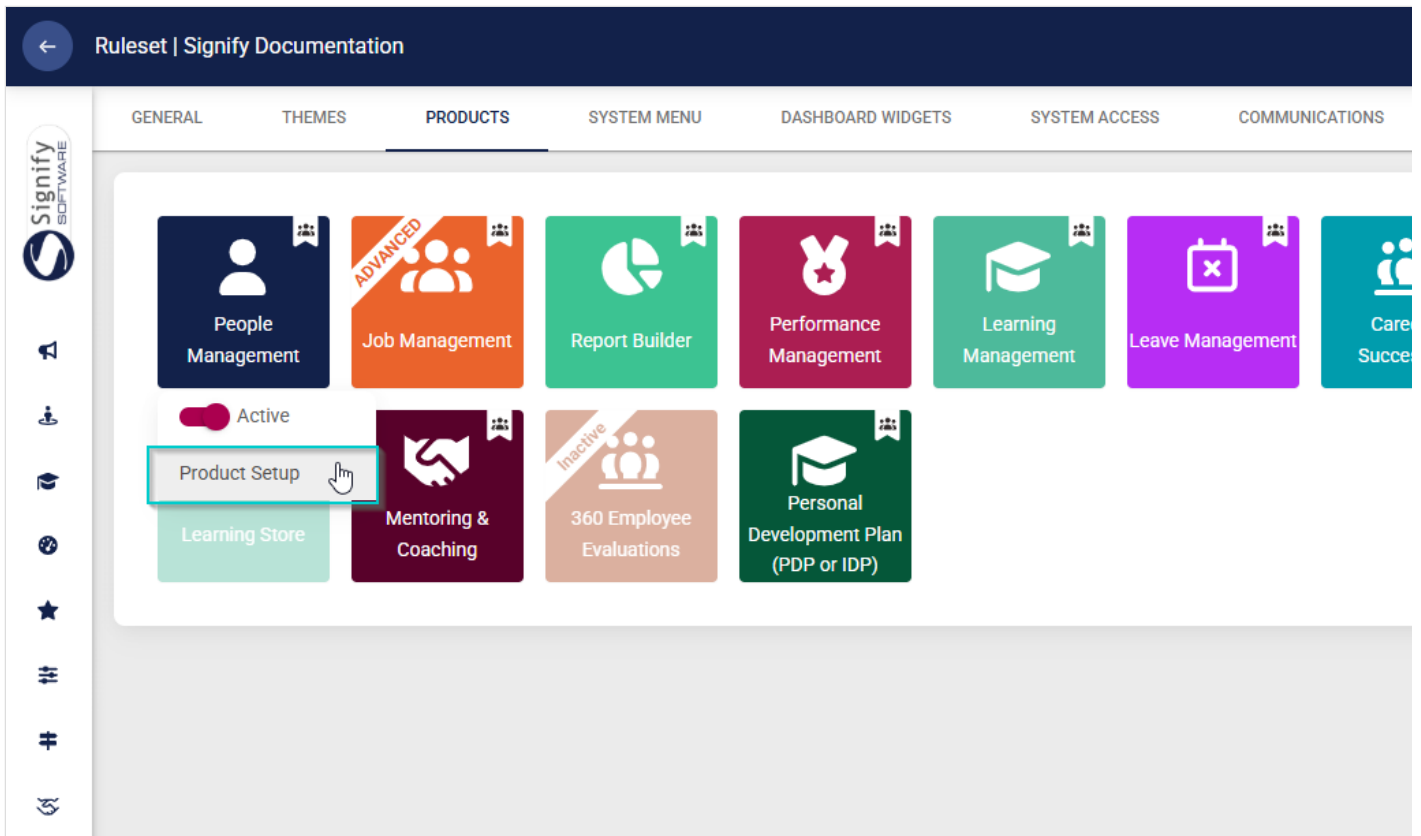
- Click **Product Setup** in the drop-down menu.



- Find the **People Management** product card and click on it.



- Click **Activate** to ensure the product is active on the system. Click **Product Setup** to configure the module.



- Let us look at each section individually.

## Particulars

- **Usernames** can be auto-generated with predetermined prefixes.
- A **default password** can be configured for use when creating new users.
- Fields can be marked as:
  - Required
  - Viewable and/or editable by Administrators
  - Viewable and/or editable by users when doing self-service.

Ruleset | Signify Documentation | Products | People Management

VIEW/EDIT SETTINGS | DOCUMENT CREATION | HR PROCESSES

### PARTICULARS

Username Auto Generation Prefix:  Default Password:

The Username will be auto-generated when populated. The default password will be used for first time login when user is created.

FIELD	REQUIRED	ADMINISTRATION		SELF SERVICE	
		VIEWABLE	EDITABLE	VIEWABLE	EDITABLE
Username	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Surname	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Middle Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Initials	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Known As	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Home Language	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Title	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Biographical

- A unique feature is the **validation** of ID numbers in the system, which can be activated/deactivated using the drop-down menu.
- Fields can be marked as:
  - Required
  - Viewable and/or editable by Administrators
  - Viewable and/or editable by users when doing self-service.

Ruleset | Signify Documentation | Products | People Management

VIEW/EDIT SETTINGS | DOCUMENT CREATION | HR PROCESSES

### BIOGRAPHICAL

FIELD	REQUIRED	ADMINISTRATION			SELF SERVICE	
		VIEWABLE	EDITABLE	VALIDATION REQUIRED	VIEWABLE	EDITABLE
Gender	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Race	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Citizenship	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marital Status	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Type of Disability	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ID Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Passport Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marital Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Birthdate	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## Contact Details and Social Contact Details

- Fields can be marked as:
  - Required
  - Viewable and/or editable by Administrators

- Viewable and/or editable by users when doing self-service.

The screenshot shows the 'VIEW/EDIT SETTINGS' page for 'CONTACT DETAILS' and 'SOCIAL CONTACT DETAILS'. The interface includes a search bar and navigation tabs for 'VIEW/EDIT SETTINGS', 'DOCUMENT CREATION', and 'HR PROCESSES'. The settings are organized into two sections: 'CONTACT DETAILS' and 'SOCIAL CONTACT DETAILS'. Each section has a table with columns for 'FIELD', 'REQUIRED', 'ADMINISTRATION' (VIEWABLE, EDITABLE), and 'SELF SERVICE' (VIEWABLE, EDITABLE). Red toggle switches indicate which permissions are active for each field.

FIELD	REQUIRED	ADMINISTRATION		SELF SERVICE	
		VIEWABLE	EDITABLE	VIEWABLE	EDITABLE
Work Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Home Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mobile Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Alternate Mobile Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Alternate Email	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

FIELD	REQUIRED	ADMINISTRATION		SELF SERVICE	
		VIEWABLE	EDITABLE	VIEWABLE	EDITABLE
Facebook	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LinkedIn	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Employment History at Previous Companies and Appointment History at Current Company

- Fields can be marked as:
  - Required
  - Viewable and/or editable by Administrators
  - Viewable and/or editable by users when doing self-service.

The screenshot shows the 'VIEW/EDIT SETTINGS' page for 'EMPLOYMENT HISTORY AT PREVIOUS COMPANIES' and 'APPOINTMENT HISTORY AT CURRENT COMPANY'. The interface includes a search bar and navigation tabs for 'VIEW/EDIT SETTINGS', 'DOCUMENT CREATION', and 'HR PROCESSES'. The settings are organized into two sections: 'EMPLOYMENT HISTORY AT PREVIOUS COMPANIES' and 'APPOINTMENT HISTORY AT CURRENT COMPANY'. Each section has a table with columns for 'FIELD', 'REQUIRED', 'ADMINISTRATION' (VIEWABLE, EDITABLE), and 'SELF SERVICE' (VIEWABLE, EDITABLE). Red toggle switches indicate which permissions are active for each field.

FIELD	REQUIRED	ADMINISTRATION		SELF SERVICE	
		VIEWABLE	EDITABLE	VIEWABLE	EDITABLE
Employment History	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

FIELD	REQUIRED	ADMINISTRATION		SELF SERVICE	
		VIEWABLE	EDITABLE	VIEWABLE	EDITABLE
Select from Job Library This setting will allow the user to select a job from the library when appointing a new person. They will also have the ability to create a new Job Title in the library. A position will be created for the selected Job Title with the same Position Title.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## User Assets

- Fields can be marked as:
  - Required
  - Viewable and/or editable by Administrators
  - Viewable and/or editable by users when doing self-service.

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SEARCH here...

VIEW/EDIT SETTINGS DOCUMENT CREATION HR PROCESSES

### USER ASSETS

FIELD	ADMINISTRATION			SELF SERVICE	
	REQUIRED	VIEWABLE	EDITABLE	VIEWABLE	EDITABLE
Asset Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Asset Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Quantity	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Description	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Serial Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Date Issued	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Expected Return Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Actual Return Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## Additional Sections

- Fields can be marked as:
  - Required
  - Viewable and/or editable by Administrators
  - Viewable and/or editable by users when doing self-service.

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SEARCH here...

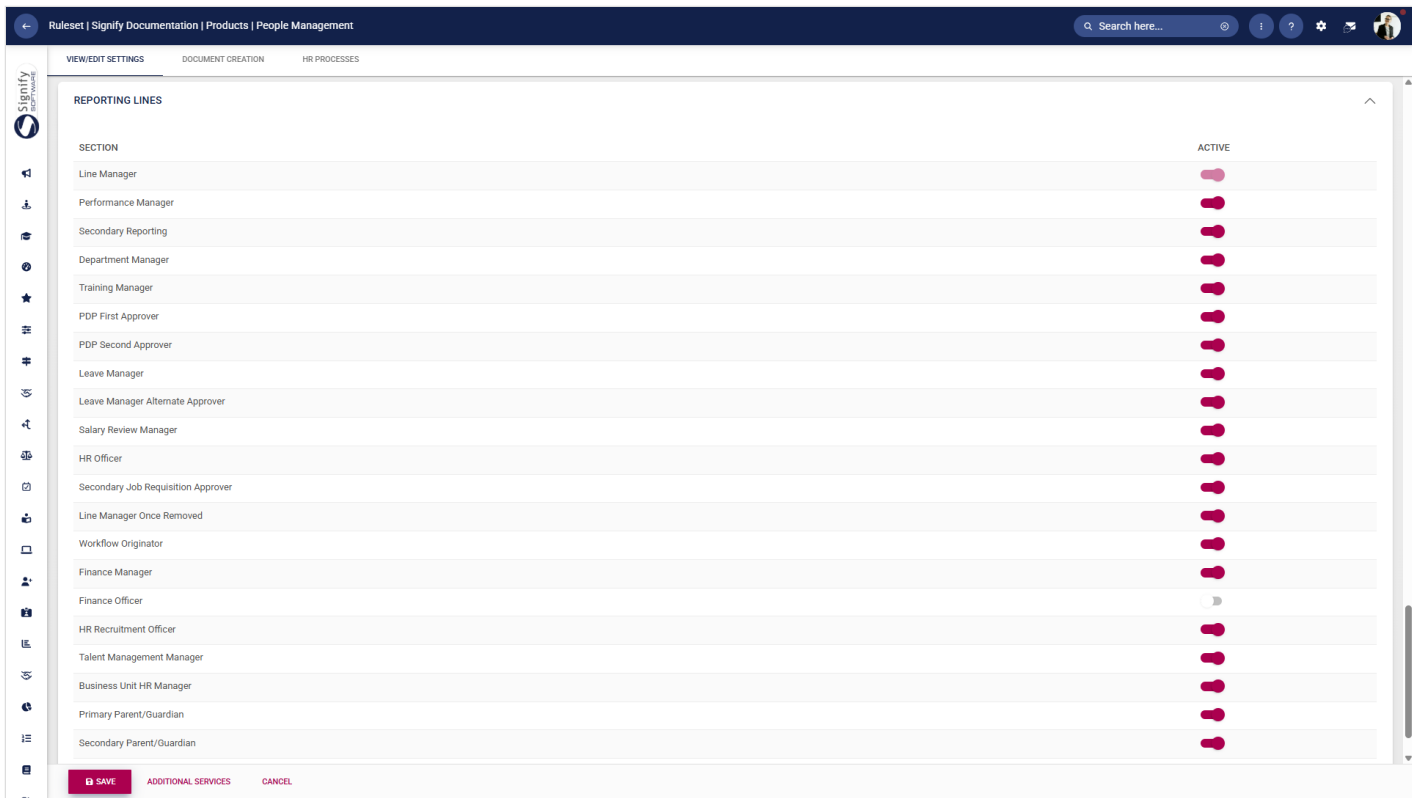
VIEW/EDIT SETTINGS DOCUMENT CREATION HR PROCESSES

### ADDITIONAL SECTIONS

SECTION	ACTIVE	ADMINISTRATION		SELF SERVICE	
		VIEWABLE	EDITABLE	VIEWABLE	EDITABLE
Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Labour Relations: Disciplinary Actions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

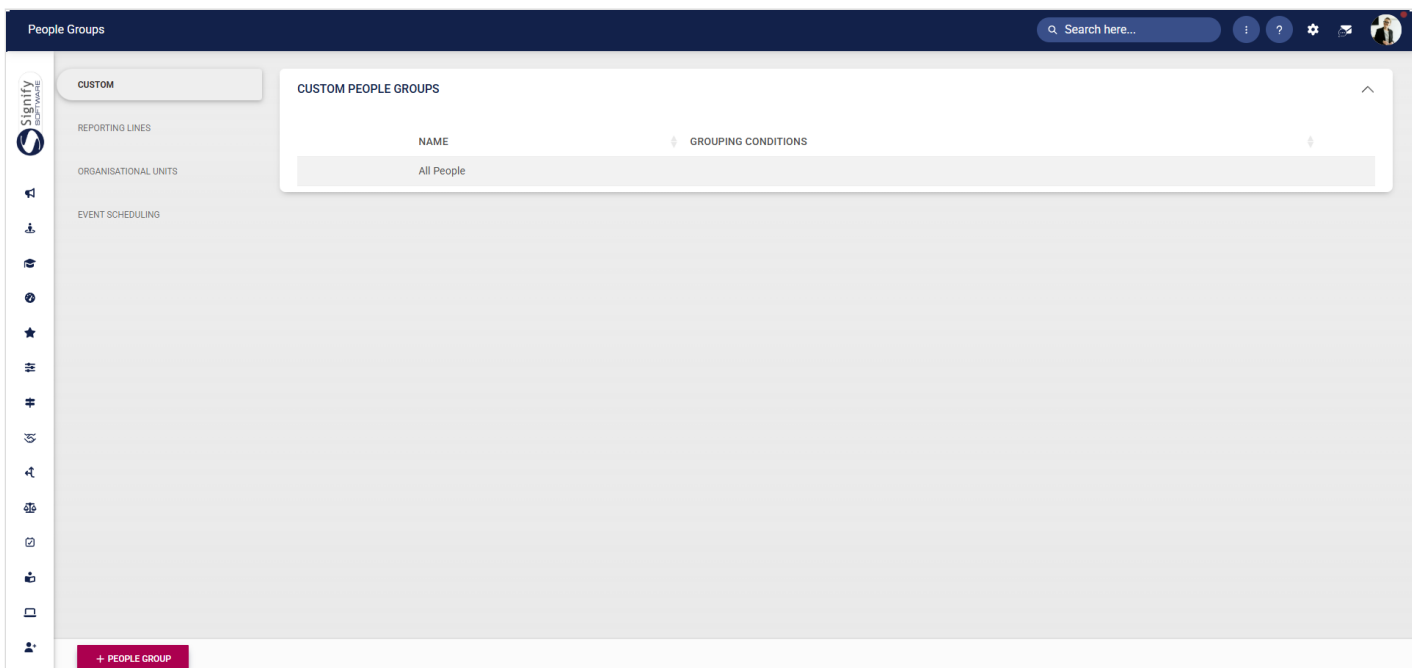
## Reporting Lines

- Fields can be marked as:
  - Required
  - Viewable and/or editable by Administrators
  - Viewable and/or editable by users when doing self-service.



## Step 3: Create People Groups

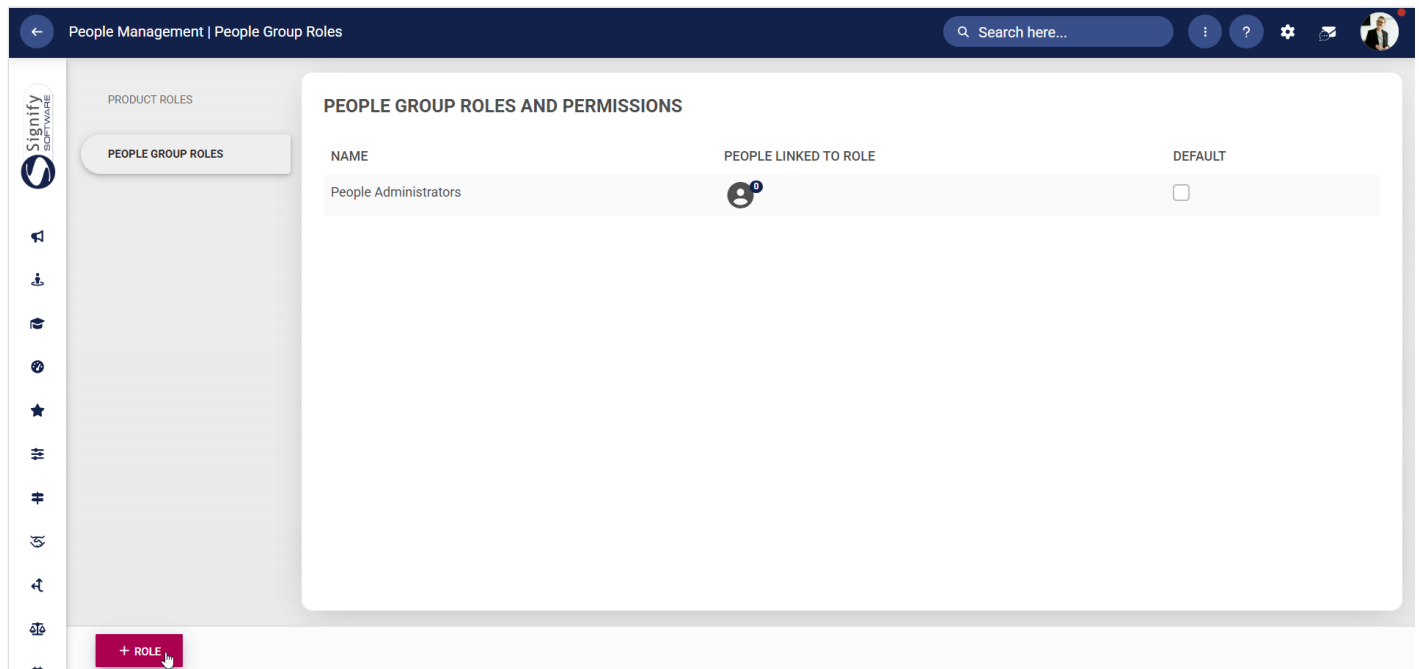
A target audience, or a **People Group**, can be created to identify users based on specific criteria.



For a detailed guide to creating people groups, click [here](#).

## Step 4: Create People Groups Roles

**People Group Roles** come with specific permissions that can be assigned to individuals. These permissions allow a person in this role to manage specific aspects of a group.



For a detailed guide to creating people group roles, click [here](#).

## Success!

Congratulations! You have successfully implemented the **People Management** module. For more details on how to use the module, view the next chapter: [Chapter 4: Using the People Management module](#).