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.

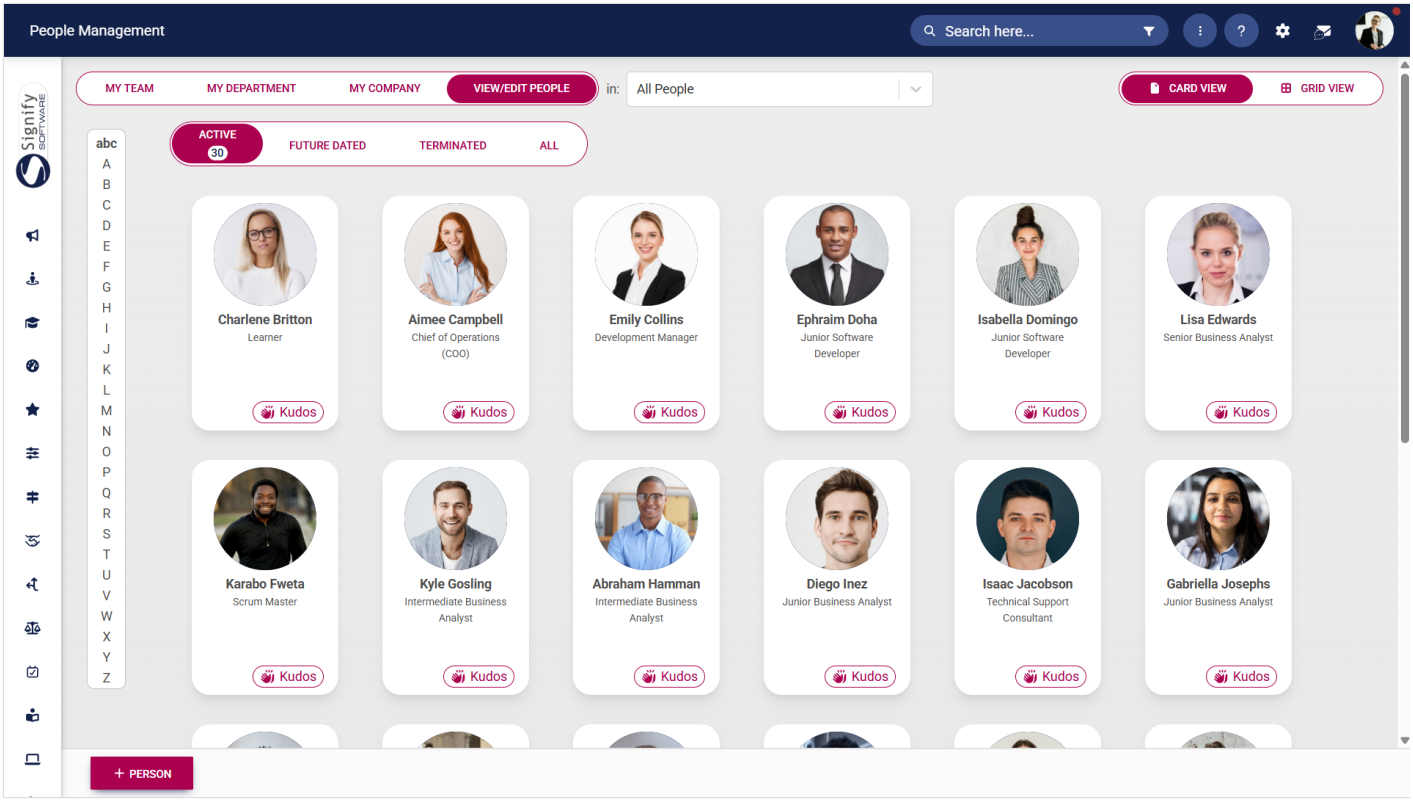
People Management Implementation Guide

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**.



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

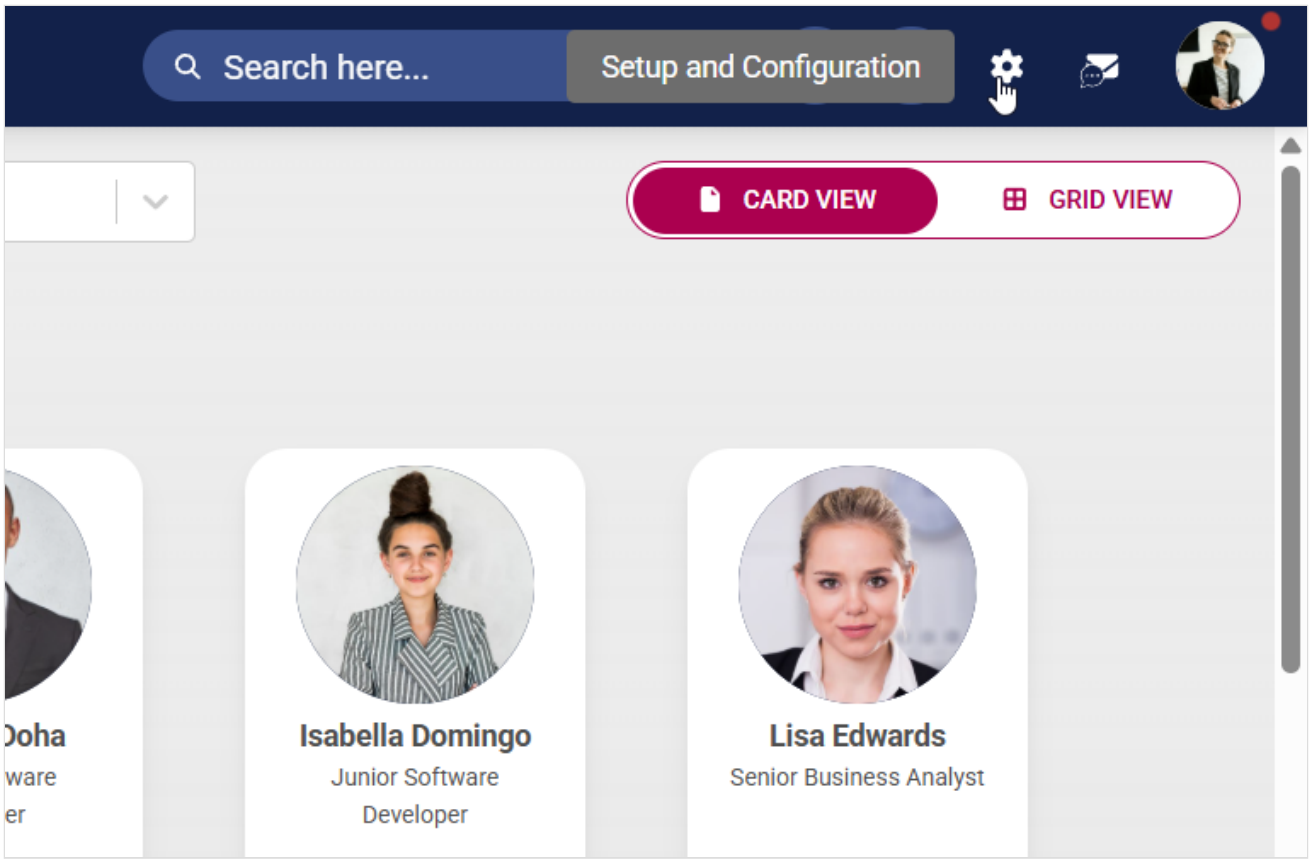


Click **here** for details on how to update the **Master Data Library**.

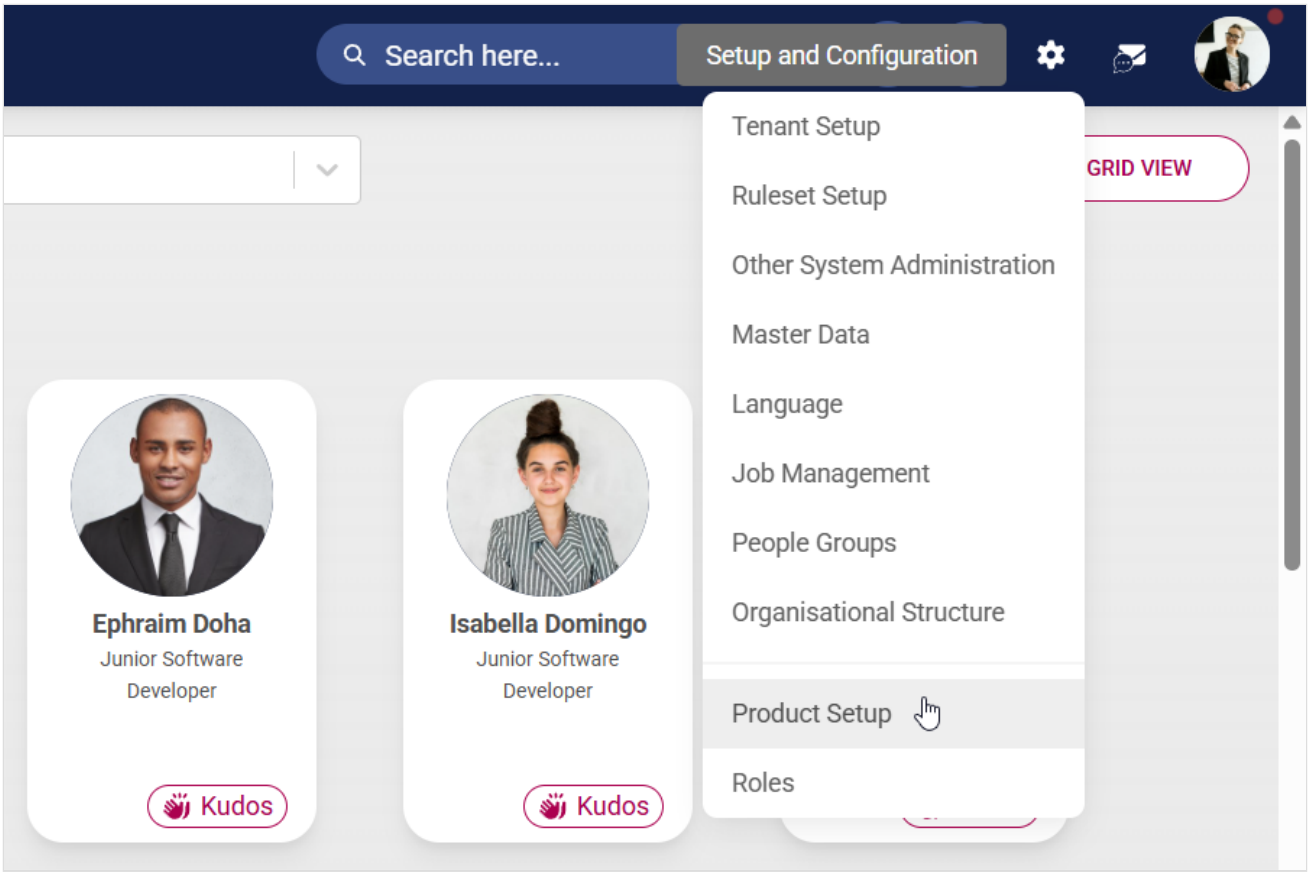
Step 2: Manage the People Management fields

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**.

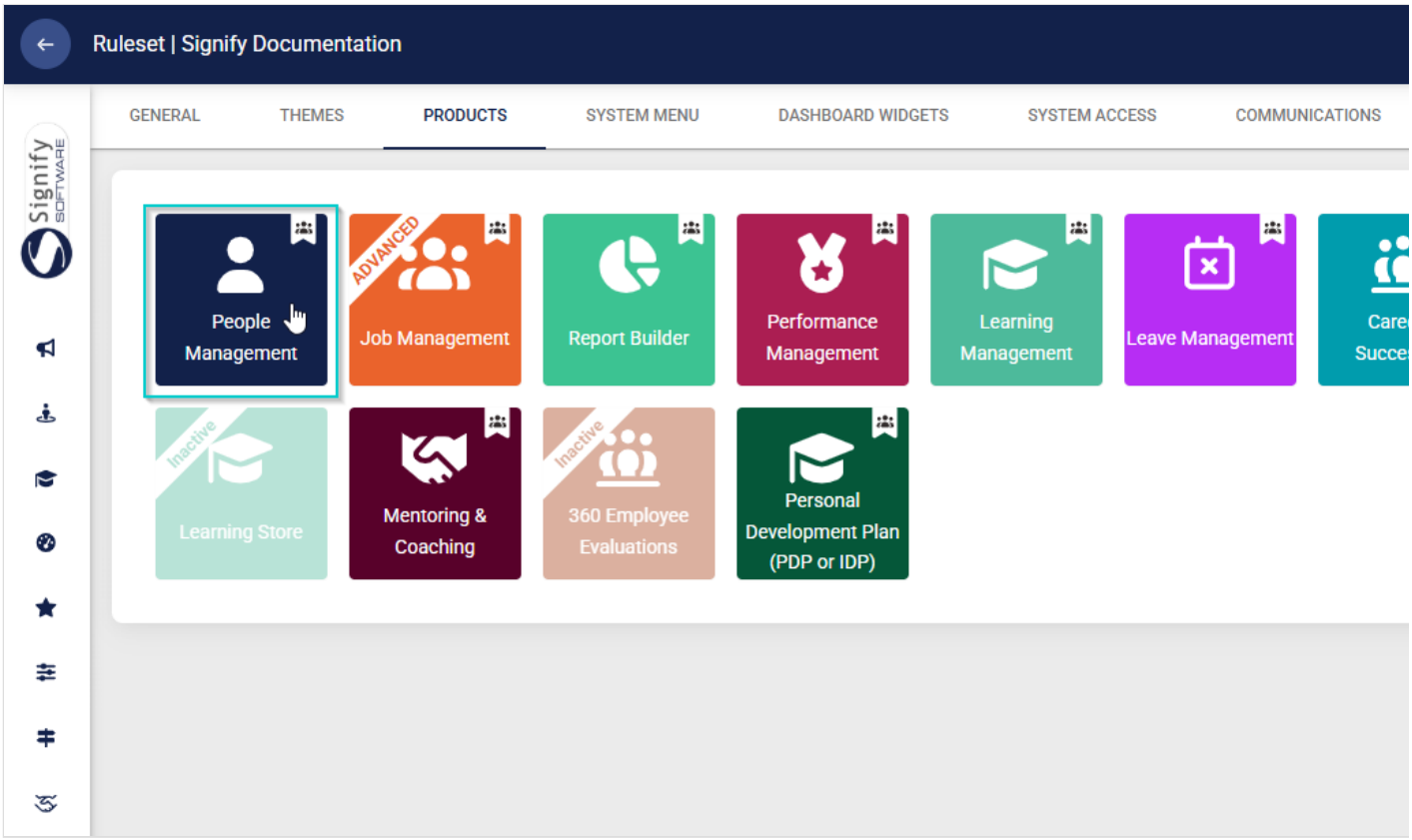
- Click the **gear icon** to access the **Setup and Configuration** menu.



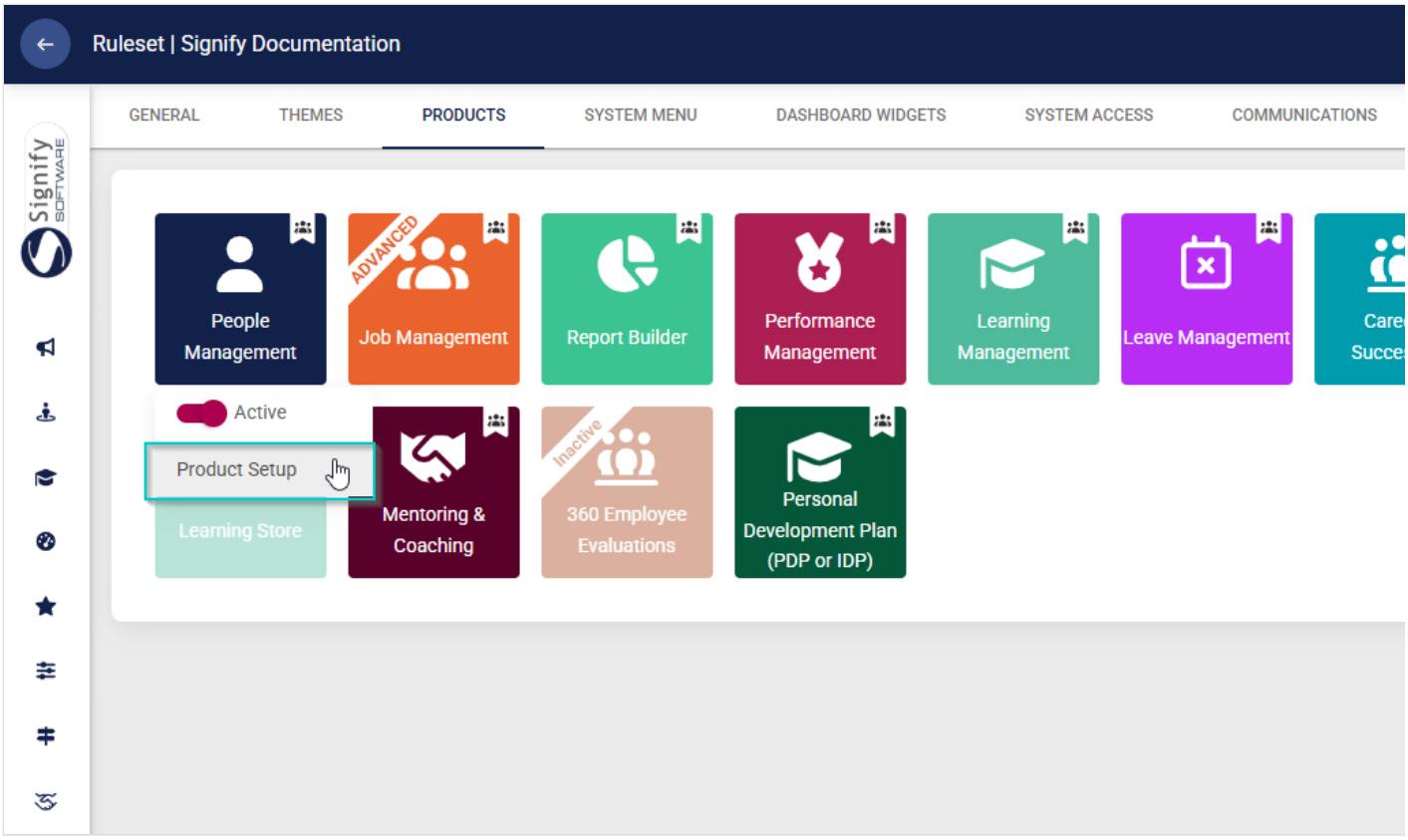
- Click **Product Setup** in the drop-down menu.



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



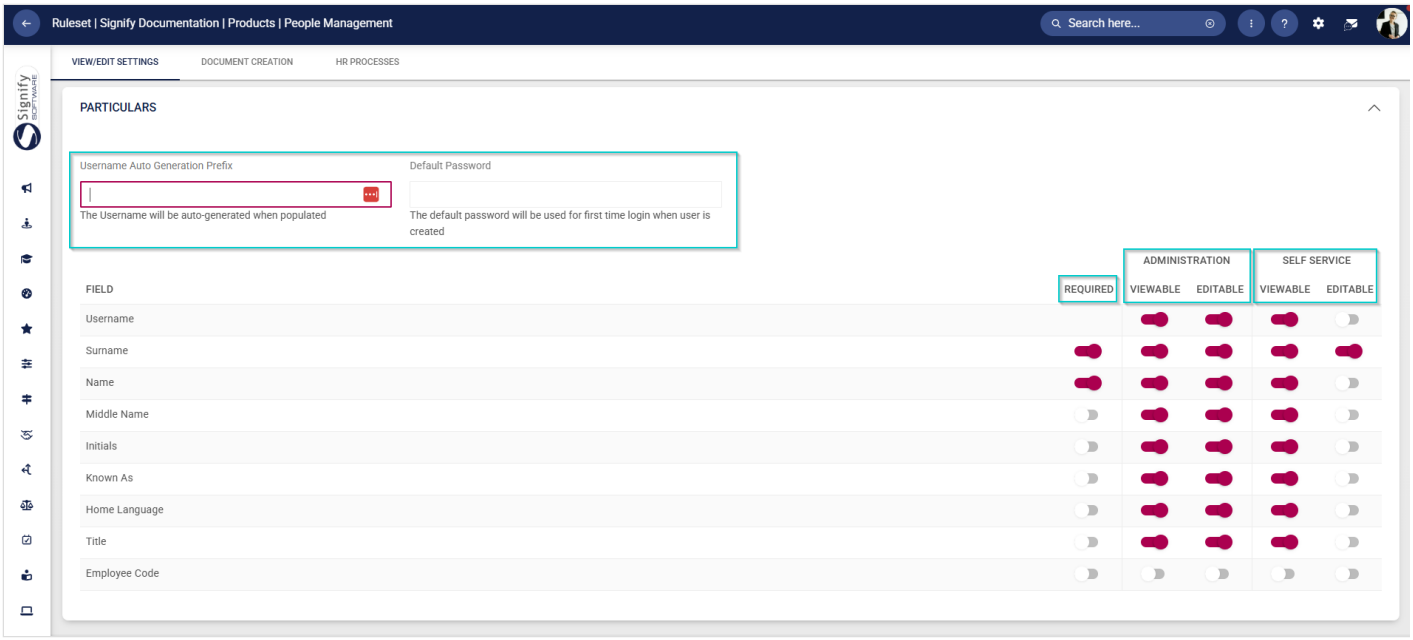
- Click **Activate** to ensure the product is active on the system. Click **Product Setup** to configure the module.



- Let us look at each section individually.

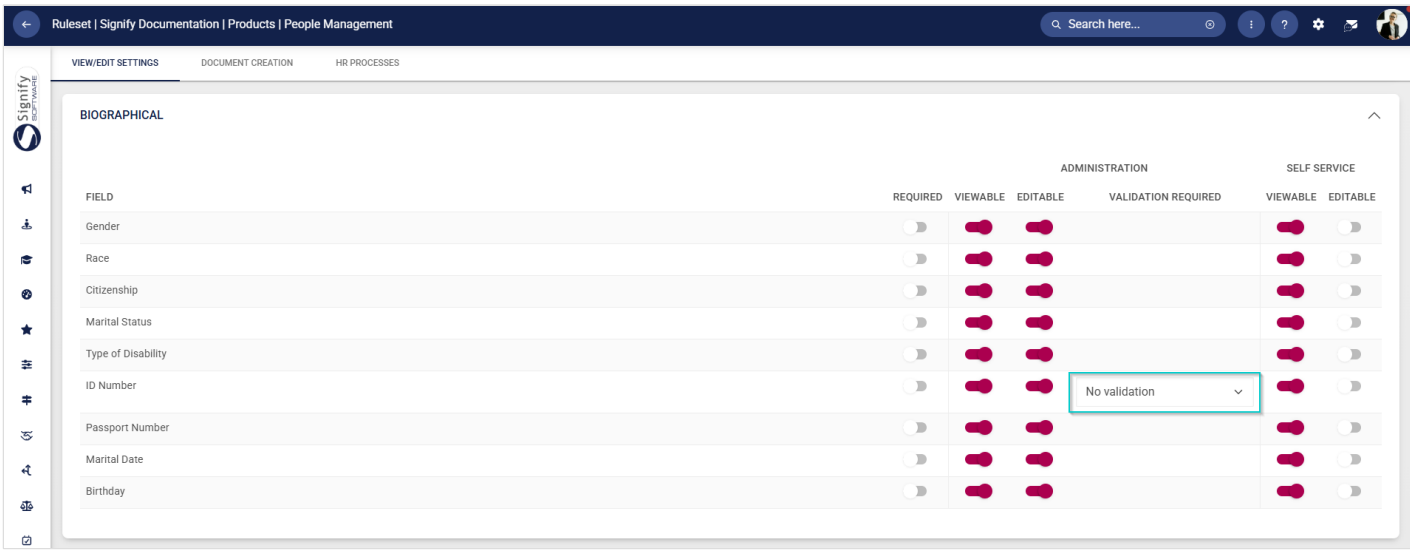
Particulars

- **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.



Biographical

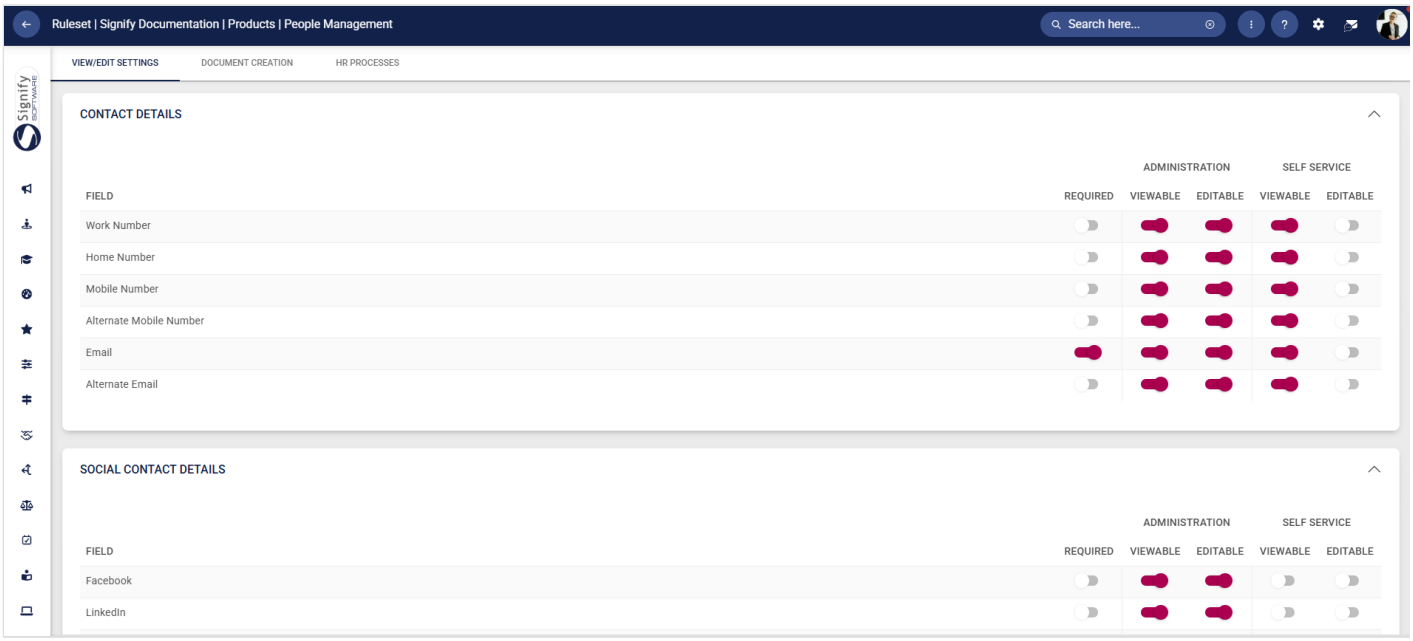
- A unique feature is the **validation** of ID numbers in the system, which can be activated/deactivated using the drop-down menu.
- Fields can be marked as:
    - Required
    - Viewable and/or editable by Administrators
    - Viewable and/or editable by users when doing self-service.



Contact Details and Social Contact Details

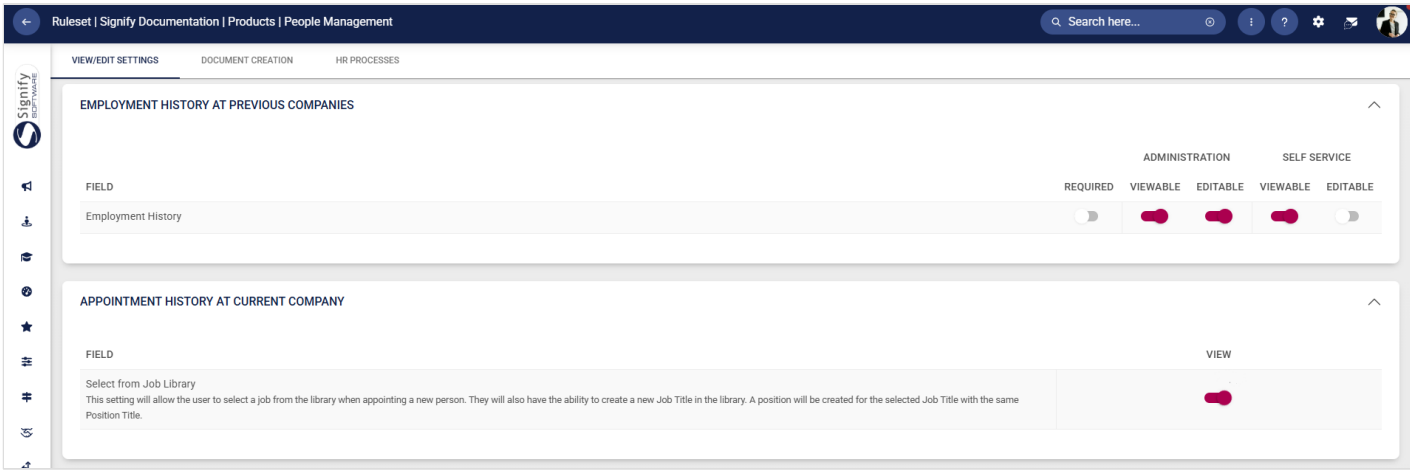
- Fields can be marked as:
    - Required
    - Viewable and/or editable by Administrators

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



Employment History at Previous Companies and Appointment History at Current Company

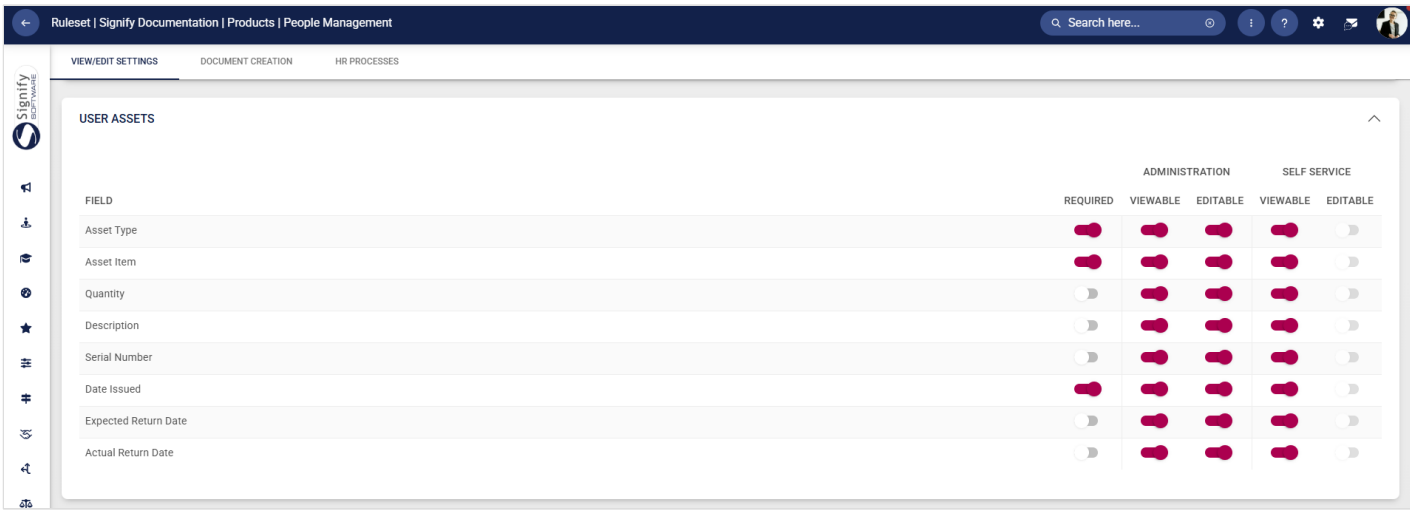
- Fields can be marked as:
  - Required
  - Viewable and/or editable by Administrators
  - Viewable and/or editable by users when doing self-service.



User Assets

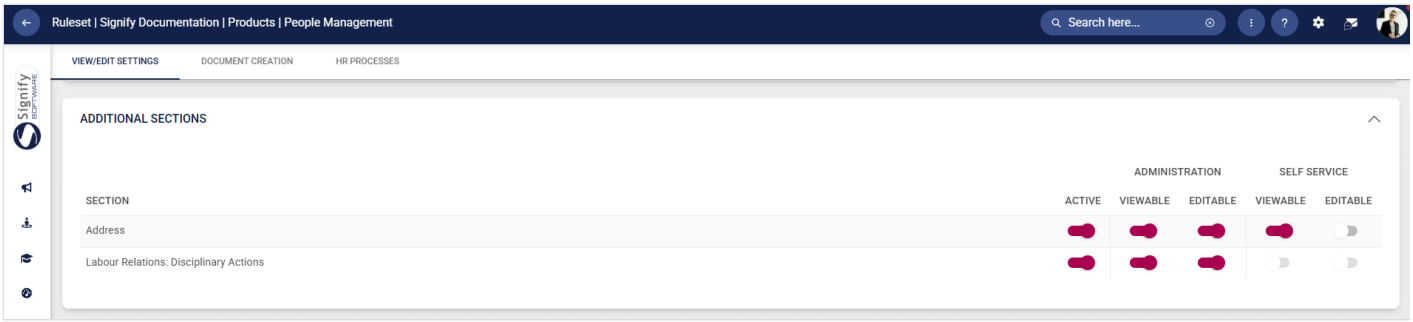
- Fields can be marked as:
  - Required
  - Viewable and/or editable by Administrators

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



Additional Sections

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



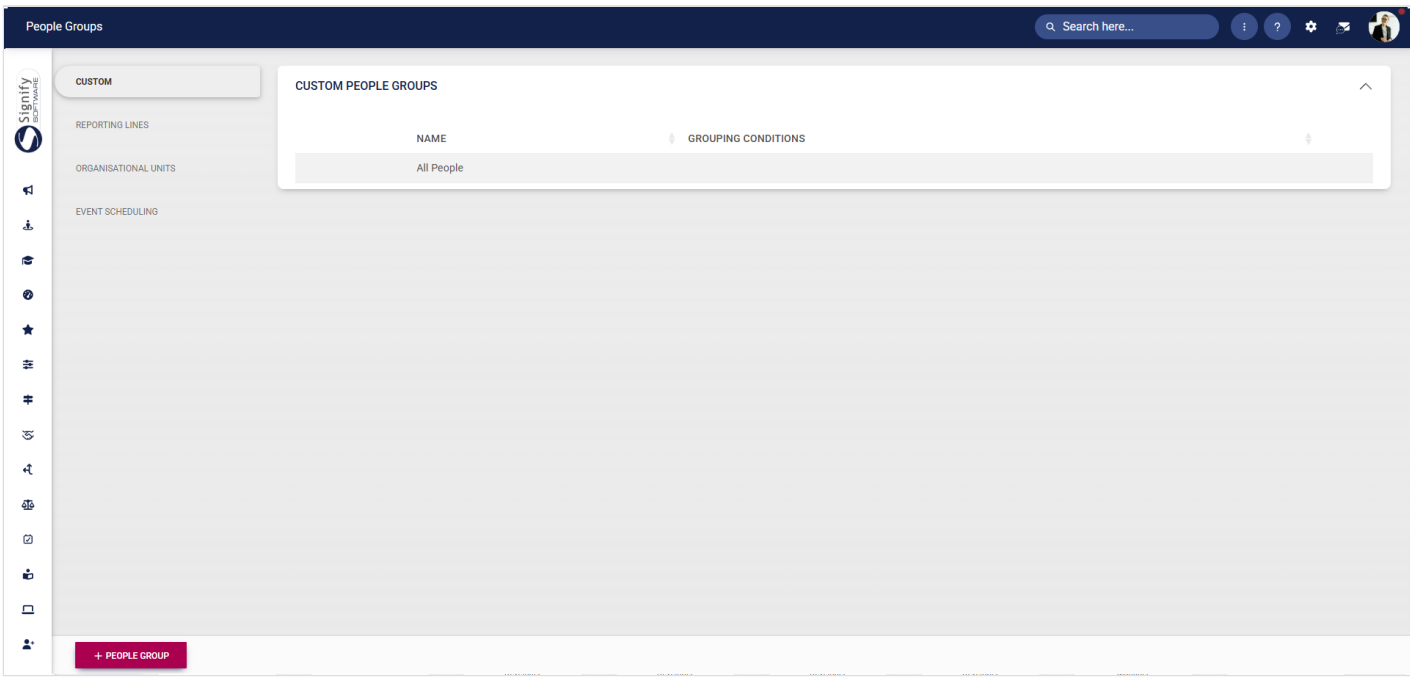
Reporting Lines

- 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

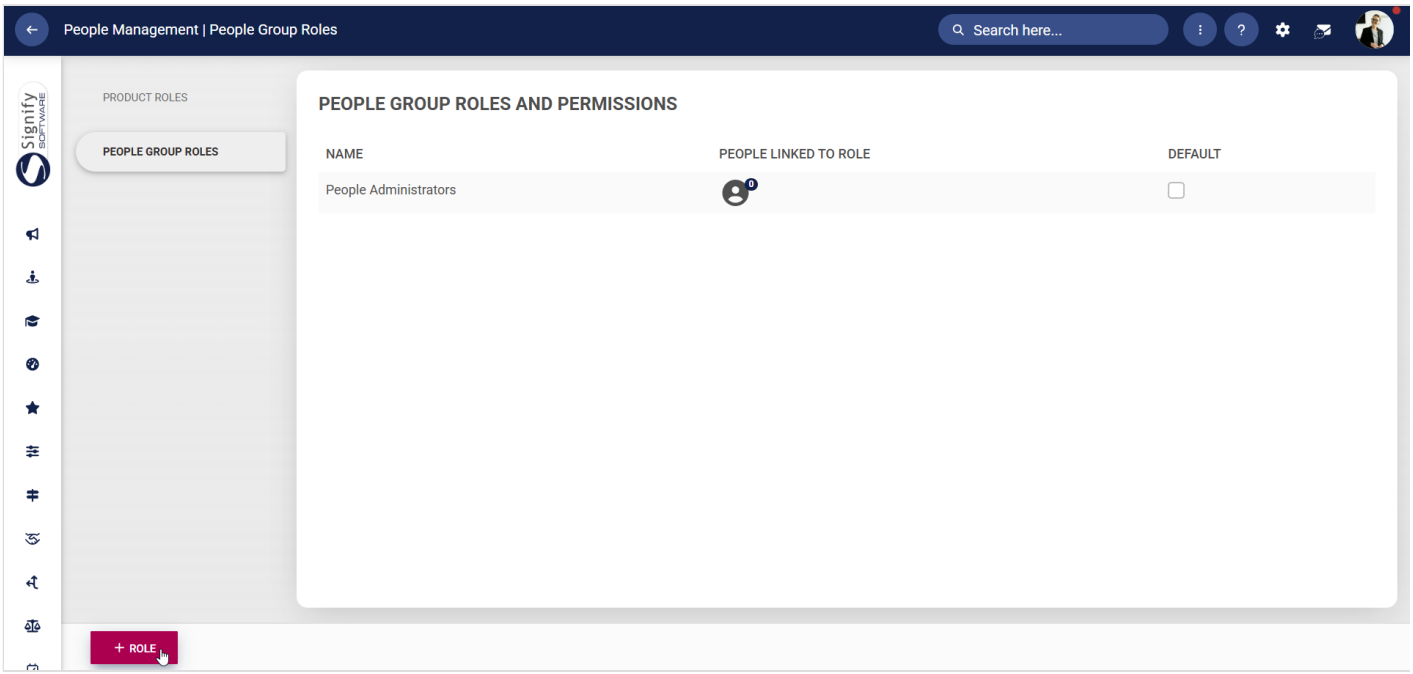
A target audience, or a **People Group**, can be created to identify users based on specific criteria.



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**.