People in Retail

User Guide

DEALER HR

Ver 1.1

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1 Login

Connect to the https://www.peopleinretail.in/ URL using a web browser. (Chrome version 63+, Firefox version 57+, Microsoft Edge version 16+, Safari version 11+ and above are recommended browsers.)

The page displays upcoming events and birthdays across the organization.

Action:

1. Click the Login button in the top right corner of the page to sign into the main website.

You should now be at this page - https://www.peopleinretail.in/panel/login.

1. Type in the Username and Password (given to you offline by MBIL) into the appropriate spaces.
2. Click the Login button.

> **Note:**
>
> Make sure you store this Username and Password in a secure location. You cannot change or reset either of this on your own. If you forget your password, you will have to contact the MBIL Administrator offline to obtain a new password. The new password will be generated and mailed to your registered mail id.

1.1 Sign Out

To sign out of the application:

Action:

1. Click your picture in the Navigation Bar.
2. Select the Logout option from the list that is displayed.

2 Landing Page

The Landing page displays a summary of data for the following:

2.1 People Deficit

The first set of cards displays summary numbers of headcount deficit status in various roles across your organization.

Action:

1. Click the Senior Management card to go to a more detailed Senior Management Deficit Status page.
   or
2. Click any of the other cards to navigate to the Attrition page, where you can view more detailed data on the headcount status across roles.

Use the filter provided to the top right of the People Deficit list to view data separately for the Sales and Customer Services teams.

2.2 Open Positions

Two lists here separately display a summary of open positions across the Sales and Customer Services teams.

2.3 Upcoming Birthdays

This list shows all upcoming birthdays in the current month, across your organization.

3 Navigation Bar

The Navigation Bar is the dark coloured band displayed at the top of the page. On this band are a series of icons that point to different pages and functions. Click an icon to navigate to the respective page or function.

🏠	Landing Page	🔔	Notifications
📊	Dashboard	👤	Settings
📄	Reports	☰	Menu

3.1 Location Filter

The drop-down list shown on the Navigation Bar between your company name and the set of icons to the right, is the Location Filter. When you are on a specific page, for example, Training - you can select a specific branch, and only data pertaining to that branch will be displayed in the page.

Town or city names indicate the category to which they belong using the following tags.
1S = Sales, 2S = Workshop, 3S = Sales and Workshop, POC = Pre-Owned Certified Cars,
VPC = Vehicle Preparation Centre.

> **Note:**
>
> Selections made in this filter are persistent across the site (except in the Organization Chart page). Meaning, when you select a branch while you are on the Training page, and then happen to navigate to the New Joinee page, only data pertaining to the selected branch will be displayed on the New Joinee page also. You must change selection to another branch to see data for that branch or 'All' to view data across your organization.

3.2 Notifications

Notifications are alerts about upcoming events. Clicking the Notifications icon displays a list of alerts about newer upcoming events like Birthdays, date reminders for submission of monthly reports, etc.

3.3 Menu

The menu provides direct access to functionality that is not listed on the Navigation Bar. Click the menu icon to see a list of functions. Select an item in the list to open the respective page.

4 Dashboard

The Dashboard displays a summary of data for the following. You can view data separately for Sales and Customer Services teams for some of the parameters.

Manpower Status	Current headcount across various positions/roles in your organization.
Manpower Deficit	Summary numbers of headcount deficit status in various positions across your organization.
Open Positions	List of open positions for which hiring is ongoing across the organization. This list is segregated into Sales and Customer Services.
Attrition	Summary numbers of resignations across various positions across your organization in the current month.
Training Trend	Summary numbers of people in Sales and Customer Services teams who have attended different trainings or got certified in various programmes.
Productivity & Tenure Analysis	Tenure vs Productivity analysis chart showing how tenure impacts productivity for the current month.
Productivity (Sales Numbers)	Comparative lines showing productivity of C-Sales certified individuals against people without certification for the current month.

5 Manpower

Use the Manpower option in the menu to add a new employee to the system, or to edit details of an existing employee.

Action:

1. Click the Menu icon on the Navigation Bar.
2. Then select Manpower

The Manpower List page is displayed.

You can narrow down the list using the following three options:

1. Select Sales or Customer Services in the first filter.
   or
2. Select Active or Resigned in the second filter.
   or

3. Search for a specific keyword in the Search box on the right. Keywords can be part of a name, part of a designation, part of a department, part of a job title, or part of a location.

5.1 Add New

Action:

1. To add a new employee to this list, click the Add New button.
2. Update all the fields with relevant data.
3. Click Update to save your changes.

The Manpower List page is displayed.

If the person you're adding is an ex-employee:

1. Select 'Yes' under the Ex-employee options displayed to the left of the page.
2. Select their last employee ID from the displayed list of resigned employees.

That person's data is automatically retrieved and displayed in the page now. Make relevant changes and click the Update button to save your changes.

5.2 Edit a Record

Action:

To edit an existing record:

1. Select a name from the list.
   The employee's details are displayed in a details page.
2. Click the Edit button.
3. Update all the fields with relevant data.
4. Click Update to save your changes.

5.3 Transfers & Promotions

When an employee is promoted or transferred, or both happen together, get to this page to update relevant details. Once you're in the employee details view page:

1. Click the Transfers & Promotions button.
2. Select the appropriate option and fill in the relevant details.
3. Click Update.

5.4 Export

You can export the entire list of employees at any time by clicking the Export button shown in the Manpower List page. The list of employees is saved as a Microsoft Excel file.

6 Position Wise Data

Use the Position Wise Data option in the menu to see summary data of current headcount, resignations and hiring plan for different roles in the organization, for one month at a time. By default, data for the current month is displayed.

Action:

To select a different month:

1. Click the Month Name displayed below the Navigation Bar.
2. From the calendar that is displayed, select any date in a month.
3. Click OK

You can narrow down the list using one of the following options:

1. Search for a specific keyword in the Search box on the left. Keywords can be part or whole of a Position Name.
   or
2. Select Sales or Customer Services in the filter on the right.

6.1 Export to XLS

After you have applied the necessary filters, you can also use the Export button to export data into a .XLS (Microsoft Excel) file.

Action:

1. Click the Export button shown to the top right corner of the page.
2. Choose the Save File option in your browser and save the .XLS file to a folder on your computer.
   You can then open the file using Microsoft Excel (or any other spreadsheet software that can import a .XLS file)

7 New Joinee

Use the New Joinee option in the menu to see summary data of new employees who have joined over a selected date range. Data can be viewed for the entire organization or a specific branch.

Action:

To select a different start and end date for the date range:

1. Click the From Date displayed below the Navigation Bar.
2. From the calendar that is displayed, select a date in a month.
3. Repeat steps 1 & 2 for the To Date.
4. Click OK

You can narrow down the list using one of the following options:

1. Select a level from the first filter shown next to the New Joinee page title.
   or
2. Search for a specific keyword in the Search box on the left. Keywords can be part or whole of a Name, part of a location name, or part of a job title.
   or
3. Select Sales or Customer Services in the filter on the right.

7.1 Edit Employee Record

Action:

Refer Section 5.2.and Section 5.3 for step-by-step methods on editing records.

8 Attrition

Use the Attrition option in the menu to view summary data of resigned employees for a branch or the organization. Data can also be viewed for a specific date range and for Sales and Customer Services teams separately.

Action:

To select a different start and end date for the date range:

1. Click the From Date displayed below the Navigation Bar.
2. From the calendar that is displayed, select a date in a month.
3. Repeat steps 1 & 2 for the To Date.
4. Click OK

To narrow down the list further:

1. Select one or more Designations from the list.
   Each selected designation is added as a search criterion to the Resigned Employees list below.
   To remove a criterion, click the 'x' shown next to the criterion.
   or
2. Select Sales or Customer Services in the filter next to the Attrition table above.

9 Senior Management Status

Use the Senior Management Status option in the menu to view summary data for vacant and filled Senior Management positions.

Action:

To narrow down the list further:

1. Select Sales or Customer Services in the filter next to the Attrition table above.

9.1 View Details

Action:

1. Select a percentage number shown against a Position in the list, to see a detailed breakup of that Position's deficit status across your organization.

10 Recruitment Tracker

Use the Recruitment Tracker option in the menu to add interview candidates to the system.

Action:

To narrow down the list further:

1. Search for a specific keyword in the Search box on the right. Keywords can be part or whole of a name, part or whole of a position, part or whole of a status, or part or whole of a location.
   or
2. Select Sales or Customer Services in the filter next to the Attrition table above.

10.1 Update Status

Action:

To Update only the Status column for one or more records:

1. Click the Edit button on the right.
2. Update the status of the relevant records by selecting the status from the list shown against each record.
3. Click Update on the top right of the list to save your changes.

10.2 Add a New Candidate

Action:

1. To add a new candidate to this list, click the Add New button.
2. Update all the fields with relevant data.
3. Click Update to save your changes.

    The Recruitment Tracker page is displayed.

10.3 Edit Details of a Candidate

Action:

1. Select a candidate name from the list.
2. Click the Edit button in the top right corner of the page.
3. Update all the fields with relevant data.
4. Click Update to save your changes.

    The Recruitment Tracker page is displayed.

11 AHEAD Tool Kit

Use the Ahead Tool Kit option in the menu to track and edit the AHEAD Compliance Status of your organization.

11.1 Viewing Summary/Trend Data

Action:

1. Select All in the Navigation Bar.
2. Select a compliance topic in the list in the top right-hand corner of the page.
   This is the summary view of compliance trends.
3. Select a Status percentage number shown against a sub topic, to view branch wise detailed view of the data for that sub topic.

11.2 Editing Data

Action:

1. Select a branch in the Navigation Bar.

2. Select a compliance topic in the list in the top right-hand corner of the page.
   This is the summary view of compliance trends.
3. Click the Edit button on the top right-hand corner of the page.
4. Update all the fields with relevant data.
5. Click Save to save your changes.

12 Training

Use the Training option in the menu to view summary data of employees who have completed/not completed different training programmes assigned to them. You can also edit individual records.

Action:

By default, the list displays data for the Sales team:
1. Use the filter on the top right of the list to view data for the Customer Services team.

Action:

To view summaries across branches:
1. Select any number (less than 100%) in the list to view a branch wise break up of that number.
   or
2. Select a branch in the [Navigation Bar](#).

12.1 Edit Individual Records

Action:

1. Select a branch in the Navigation Bar.
2. When the list of employee names is displayed, click the Edit button in the top right corner of the page.
3. Update all the fields with relevant data.
4. Click Update to save your changes.

13 Productivity

Use the Productivity option in the menu to view/change productivity data of individual employees across the organization.

Action:

To narrow down the list further:
1. Search for a specific keyword in the Search box on the right. Keywords can be part or whole of a name, part or whole of a location, or part or whole of a job title.
   or
2. Select a year from the list on the top left of the table.

13.1 Edit Data

Action:

To edit productivity numbers of individuals:

1. Select a branch from the list in the [Navigation Bar](#).
2. Click the Edit button (above the Search box).
3. Update all the fields with relevant data.
4. Click Save to save your changes.

13.2 Export to XLS

Action:

To edit productivity numbers of individuals:

1. Select a branch from the list in the [Navigation Bar](#). Or select All if you want to export the list for the entire organization.
   (If a branch is selected, only data of that branch will be exported.)
2. Click the Export button (above the Search box).
3. Specify a folder location on your computer, to save the .XLS file.
4. Click Save to finish downloading the file.
   You can now open that file using Microsoft or a compatible .XLS file reader.

14 Engagement Calendar

Use the Employee Engagement Calendar in the menu to plan, update and track organization wide events involving employee groups.

14.1 Viewing Summary Data

Action:

1. Select All in the Navigation Bar.
2. The Employee Engagement Calendar displays events scheduled across the current year. Select a past year, to view older events from the previous years.

14.2 Plan an Activity or Update Data

Action:

1. Select a branch in the Navigation Bar.
   The Calendar displays Scheduled, Re-scheduled, Completed and Incomplete Events across the year. You can update data for completed events,
   or

Scheduled	An event has been scheduled for the indicated month under an Activity plan.
Re-Scheduled	An event that was scheduled for a specific date earlier has been re-scheduled to the indicated month.

Completed	A scheduled event has been completed, and data and photos have been updated.
Not Completed	The date for a scheduled event has passed, and the event may have been conducted, but data and photos have not been uploaded.

2. Click Plan to add new events to the calendar.

Planned	An event has been scheduled for the indicated month.
Add Plan	No event has been scheduled for this month, for the activity. You can click the '+' to add an event.
Completed	A scheduled event has been completed, and data and photos have been updated.

3. Click the Add New Event button to add a new activity to the list.
4. Update all the fields with relevant data.
5. Click Save to save your changes.

15 Organization Charts

Use the Organization Charts tool to generate Org Charts of either the Sales Organization Structure or the Customer Services Organization Structure of a specific branch of a Dealer.

15.1 Generate a Chart

Action:

1. Note that the Location Filter that is universally applicable in the rest of the pages of this app is not applicable here. You will have to select the Branch and Organization Structure for which you wish to generate the Org Structure.
2. Then click the Generate button.

Click a box indicating a designation to fold or unroll the reporting structure under that designation. You can also use the scroll-wheel on your mouse (pointing device) to zoom in or out of the chart. You can also use the mouse to pan the image in any direction to see the parts that are currently not visible on screen.

Note:

When an Org structure is displayed on the screen, the filters band is folded away. Click the little downward pointing black arrow shown in the top left corner of the page to open the filters band again.

16 Extra Manpower

Use the Extra Manpower option to view and manage a list of seasonal or contract employees across dealerships. Note that these employees are not listed in the regular employee reports or the Manpower List.

You can search using partial or complete data from the Employee ID, Name, Department, Job Title, Dealership or Location columns. Use the option on the top left corner of the page to switch between lists of Active and Resigned employees.

16.1 View Employee Data

Action:

1. Click on an Employee Name to view details of that employee.

16.2 Export to XLS

Action:

1. Once a list is displayed, click the Export button to export the displayed list to a .XLS (Microsoft Excel) file.
2. Use the Save File option in your browser dialog to save the file to a folder in your PC.

16.3 Add New Employee

Action:

1. Click the Add New button on the top right corner of the page to add a new employee's record.
2. In the subsequent Add New Employee page, fill in the relevant details and click the Update button.

17 Employee Satisfaction

Use this option to the Employee Satisfaction survey results shared with you. You can also use this feature to communicate status on Action Taken against each of the Critical Factors highlighted in previous surveys.

Action:

1. Click the Attachment link in a record to download a PDF copy of that report.

Action:

1. Click the View Action Plan link in a record, to view the status on action taken against each listed Critical Factor from previously conveyed survey results.
2. In the Action Plan page, click the links in the Critical Factors column to see details of each action. If you need to edit details of an earlier Action Taken, click the Edit button in the subsequent page. After you have made the relevant updates, click the Save button and return to the list of action plans.

18 Reports

Reports can be generated for the Sales and Customer Services teams separately for the entire organization. After a report is generated, you can click the Download PDF button to download the respective PDF.

Action:

To generate a report for the current month for a selected team:

1. Select a team from the list.
2. Click the Generate button (above the Search box).
3. Once the report is generated and displayed, click the Download PDF button to download a PDF version of this report to your computer.

19 Help Center

If you face any issues, you can access our help center at the below url:

https://peopleinretailhelp.zendesk.com/hc/en-us

You must sign up and then login to access the help center.

For assistance on how to use the help center itself, you can find the user guide here or here.

19.1 SLAs

As a first step toward resolution, please register the issue faced with a screen shot of the application. QiWorks will maintain the following SLAs:

Service Window	9 AM to 5 PM on weekdays
Response time in Service Window	4 hours
Estimated Resolution Time	QiWorks will provide an estimated time for resolution within 8 hours of ticket receipt.
Primary Contact	support@peopleinretail.in

19.2 Phone Contact/Escalation

For critical issues only: Should you not receive a response in the times mentioned or if you encounter a high priority bug that completely blocks the functionality of the system, you can reach Ananth from QiWorks at ananth@qiworks.in or +91 98805 99498 between 9 AM and 5 PM on non-holiday weekdays. It is necessary for your ticket to be created in the help center prior to calling the above phone number. Without a ticket number, we will be unable to resolve any issue.