

# PeopleXD Cross Product

## User Guide Library

**PeopleXD Cross Product**

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## Document Control

Version	Date	Author	Details
1.0	10/10/2024	Georga Edwards	Published to Customer Success Portal
1.1	05/11/2024	Georga Edwards	Update to Native App Last Updated date.
1.2	12/02/2025	Georga Edwards	Added new guide Native App - FAQs
1.3	25/02/2025	Georga Edwards	Update to Native App Last Updated date.
1.4	07/03/2025	Georga Edwards	Update to Documents & Email Generation Last Updated date.
1.5	10/07/2025	Georga Edwards	Update to Native App Last Updated date.
1.6	03/09/2025	Georga Edwards	Update to Two Factor Authentication Configuration Updated date.
1.7	22/09/2025	Georga Edwards	Update to Native App Last Updated date.
1.8	16/10/2025	Georga Edwards	Update to Native App Last Updated date.

## 1. Data Migration

Title	Description	Link	Last Updated
<b>Configuring the Data Migration Tool</b>	Provides guidance on how to configure the data migration functionality on PeopleXD. <ul style="list-style-type: none"> <li>• The upload process via the Data Migration Options and Data Migration Templates widgets</li> <li>• The Data Migration Update Facility</li> </ul>	<a href="#">Portal user guide</a>	04/01/2021
<b>Data Migration Tool</b>	How to use the Data Migration functionality on PeopleXD. <ul style="list-style-type: none"> <li>• Data Migration Templates</li> <li>• Data Migration Options</li> <li>• v28 Enhancements since General Release</li> </ul>	<a href="#">Portal user guide</a>	14/06/2024
<b>Data Migration Update Facility</b>	How to use the Data Migration Update Facility widget. <ul style="list-style-type: none"> <li>• An overview of the Data Migration Update Facility widget</li> <li>• What records can be updated using the Data Migration Update Facility widget</li> <li>• How to update data using the Data Migration Update Facility widget</li> <li>• The dependency on Insight reports for employee and contract updates</li> <li>• Cancelling an update that is in progress</li> <li>• Fixing errors identified during the update</li> </ul>	<a href="#">Portal user guide</a>	24/09/2020

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Title	Description	Link	Last Updated
	<ul style="list-style-type: none"><li>An appendix with detailed guidance for each of the 26 update options</li></ul>		

## 2. Hesa

Title	Description	Link	Last Updated
<b>HESA</b>	<p>Use and configure the XD HESA module. How to use the XD HESA module &amp; how to carry out specific tasks critical to producing a valid return from within the module. This includes:</p> <ul style="list-style-type: none"><li>How to configure XD HESA to generate the required XML return</li><li>How to generate the XML file, including correcting data and bulk uploads</li></ul>	<a href="#">Portal user guide</a>	30/04/2024
<b>HESA FAQ's</b>	<p>To support you with the changes to HESA in 2024, we've collated the most common questions that you're asking us.</p> <ul style="list-style-type: none"><li>Release information</li><li>Rolling the year forward</li><li>HESA field changes</li><li>Adopting the SOC2020 coding structure</li></ul>	<a href="#">Portal user guide</a>	30/04/2024

### 3. Mobile

Title	Description	Link	Last Updated
<p><b>Native App</b></p>	<p>Steps you through the configuration required for setting up the PeopleXD Native App and granting the required user access for administrators/managers and employees.</p> <ul style="list-style-type: none"> <li>• Native App Overview</li> <li>• General Configuration</li> <li>• App Feature Configuration</li> <li>• User Access</li> </ul>	<p><a href="#">Portal user guide</a></p>	<p>16/10/2025</p>
<p><b>Native App - Centralised Configuration</b></p>	<p>Guidance on using the Mobile Configuration screen to identify what menu options and web services are required for each module in the PeopleXD Mobile App and reorder the sidebar navigation menu.</p> <ul style="list-style-type: none"> <li>• Enable the necessary menu options for the mobile app to run</li> <li>• Grant access to modules and sub-modules in the mobile app for selected menu profiles</li> <li>• Grant access to the necessary Web Services required for the app</li> <li>• Reorder the modules position in the side navigation menu</li> </ul>	<p><a href="#">Portal user guide</a></p> <p><a href="#">Watch the video</a></p>	<p>28/02/2024</p> <p>20/03/2024</p>

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Title	Description	Link	Last Updated
<b>Native App – FAQs</b>	<p>To support you with the Native App, we've collated the most common questions that you're asking us.</p> <ul style="list-style-type: none"><li>• General FAQs</li><li>• Authentication Process</li><li>• SAL Authentication Process</li></ul>	<a href="#">Portal user guide</a>	12/02/2025

## 4. Security

Title	Description	Link	Last Updated
<b>JML Roles &amp; Privileges</b>	<p>Provides guidance on how to manage the process of assigning security roles and privileges to joiner, movers and leavers (JMLs) on People XD. It gives information on what can be carried out to make the JML process more efficient and clearer for both a HR administrator and system administrator.</p> <ul style="list-style-type: none"><li>• Joiner process</li><li>• Mover process (New Contract, Additional contract, Rehire)</li><li>• Leave</li><li>• Bulk update</li></ul>	<a href="#">Portal user guide</a>	13/02/2023
<b>Security</b>	<p>Provides guidance on how Security in Portal can be used to:</p>	<a href="#">Portal user guide</a>	10/01/2023

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Title	Description	Link	Last Updated
	<ul style="list-style-type: none"> <li>• Manage XD Portal user accounts</li> <li>• Create and manage Menu Profiles</li> <li>• Define the Account Profiles used apply an organisation's password policy to users (both portal and back-office users)</li> <li>• Access screens to support product level data access on XD Portal</li> <li>• Report on user access via XD Insight</li> <li>• The use of Web Services</li> <li>• Allowing users to Self-Register for XD Portal</li> </ul>		
<b>Security Enhancements</b>	<p>Provides guidance on the enhancements which have been made to PeopleXD Security. This allows administrators and employees more visibility and pro-active control when managing user security within Portal.</p> <p>Note: The changes will start from the end of October 2023.</p>	<a href="#">Portal user guide</a>	26/10/2023
<b>Two Factor Authentication Configuration</b>	<p>Configure and manage two factor authentication (2fa).</p> <ul style="list-style-type: none"> <li>• How to use 2fa</li> <li>• How to configure 2fa as an administrator</li> <li>• How to configure 2fa as an employee</li> </ul>	<a href="#">Portal user guide</a>	03/09/2025

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Title	Description	Link	Last Updated
<b>Access Evo Security</b>	Setup Security when PeopleXD is in a Workspace tab. <ul style="list-style-type: none"><li>• Manage user accounts</li><li>• Create and manage menu profiles</li><li>• Access screens to support product level data access on PeopleXD Portal</li><li>• Manage the Workspace configuration settings</li><li>• Report on user access via PeopleXD Insight</li></ul>	<a href="#">Portal user guide</a>	06/05/2025

## 5. Other

Title	Description	Link	Last Updated
<b>Access Learning Integration</b>	How to use and configure the PeopleXD Learn platform which is an integration between PeopleXD and Access Learning. <ul style="list-style-type: none"><li>• How to access the Learn widget in XD Portal</li><li>• How to view courses within Access Learning</li><li>• How to configure XD Portal to be linked with Access Learning</li></ul>	<a href="#">Portal user guide</a>	12/11/2020
<b>Configuring Themes</b>	Provides guidance on the Themes functionality in PeopleXD. <ul style="list-style-type: none"><li>• What are themes and how are they used?</li><li>• How to review existing themes</li></ul>	<a href="#">Portal user guide</a>	13/01/2023

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Title	Description	Link	Last Updated
	<ul style="list-style-type: none"> <li>• How to create new themes</li> <li>• How to assign different themes for different companies</li> <li>• How to configure the XD Portal Login page</li> </ul>		
<b>Documents and Email Generation</b>	<p>The Document &amp; Email Generation feature on PeopleXD allows a user to automatically generate documents, letters and emails based on employee data e.g. employee contracts, letters of offer, HR forms etc.</p> <ul style="list-style-type: none"> <li>• Where to access Documents and Email templates</li> <li>• How to generate and review documents or emails</li> <li>• How to configure, create and manage templates</li> </ul>	<a href="#">Portal user guide</a>	07/03/2025
<b>Health &amp; Safety</b>	<p>Provides guidance on how to use the Health and Safety module in PeopleXD and configure the module to accurately record actions, incidents, inspections and audits.</p> <ul style="list-style-type: none"> <li>• how to navigate and use the health and safety dashboard</li> <li>• how to roll out access to the organisation</li> <li>• how to complete the different stages and approval steps included within the health and safety processes</li> </ul>	<a href="#">Portal user guide</a>	12/05/2020
<b>Language Pack</b>	<p>Provides guidance on the Language Pack in PeopleXD.</p> <ul style="list-style-type: none"> <li>• What is the Language Pack?</li> </ul>	<a href="#">Portal user guide</a>	12/01/2020

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Title	Description	Link	Last Updated
	<ul style="list-style-type: none"><li>• How to update a Language Pack label</li><li>• What is the Enable Language Pack option?</li><li>• How to set a language preference</li><li>• Configuring user access to the Language Pack</li></ul>		
<b>XD Hub</b>	Provides guidance on how to use the screens on XD Hub. <ul style="list-style-type: none"><li>• What is XD Hub?</li><li>• Using the Home Page</li><li>• A guide to the features available on the Hub</li><li>• Setting up a user</li></ul>	<a href="#">Portal user guide</a>	20/12/2019