

sage

People

Mobile iOS Configuration Guide

Version 23



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About Mobile iOS

Sage People Mobile is a dedicated app for Android - Mobile Android - and iOS - Mobile iOS. The app enables display and use of all WX Processes on mobile devices using either of the supported operating systems with minimal configuration - you decide which processes to display on Mobile with a single checkbox on the WX Process instance page.

The current release of Sage People Mobile iOS:

- Is Sage People Mobile version 2.0.1
- Requires iOS version 10 and above.
- Supports iPhone 6 and above.

As an alternative to Sage People Mobile you can use the standard Sage People application through a mobile browser - Sage People Mobile Web.

This version of Mobile iOS:

- Can be downloaded from the Apple App Store.
- Supports push notifications.
- Supports pull-to-refresh.

About this Guide

This guide covers features supported by **HCM version 23.01** or later. Make sure you are using the latest available HCM version to take advantage of the latest feature set.

Enhancements in this release are shown:

Highlighted text indicates a significant enhancement.

Related Guides

Mobile iOS Guide for Users

Coverage summary

The steps to follow when getting Sage People Mobile up and running on your mobile device under iOS. Lists the key WX processes supported by Sage People Mobile iOS, and those few processes out of scope.

Typical target audience

You want to use Sage People Mobile on your mobile device to access and use WX Processes.

Mobile Android Configuration Guide

Coverage summary

How to install and set up Sage People Mobile Android, and how to set up WX Processes for display and use through Mobile.

Typical target audience

You have responsibility for managing mobile access to the Sage People system within your organization and may also provide first line Sage People Mobile support for HR Managers and other end users.

Mobile Android Guide for Users

Coverage summary

The steps to follow when getting Sage People Mobile up and running on your mobile device under Android. Includes many frequently asked questions and their answers, addressing access and security, implementation and deployment, functionality, and branding.

Typical target audience

You want to use Sage People Mobile on your mobile device to access and use WX Processes.

WX Configuration Guide

Coverage summary

How to set up, manage, and maintain the extra functionality delivered with Sage People WX. Includes detailed configuration information. The information builds on the HCM Configuration Guide.

Typical target audience

You have overall responsibility for the content of the Sage People system within your organization and provide first line support for HR Managers.

How to Install and Set Up Sage People Mobile iOS

Sage People Mobile iOS can be downloaded from the Apple App Store.

1. When installing, select to allow Sage People to access your data.
2. Login, using your standard Sage People username and password.
3. When prompted, create a 4-digit Passcode. You can use the Passcode for future logins without needing to enter your username and password.

You can also use Touch ID in place of the Passcode. You are prompted for code or Touch ID when the Passcode timeout is triggered. You must use the code when re-opening Mobile iOS after closing, because the code must be stored in memory to calculate the decryption key; you do not get the option to use Touch ID.

The **Passcode** is also called a **PIN** in the configuration pages.

4. To use push notification, go to Settings and opt in to receive notifications.

You must also ensure:

- That your org has access to the **Sage People iOS** connected app
- That each connected app is configured with the session and PIN security settings you want (see page 8).
- Each profile assigned to Team Members who are to use Sage People Mobile has the correct Visualforce Page access (see page 10).

Setting Up Connected Apps for Sage People Mobile iOS

You need access to the Connected App for iOS:

- Sage People iOS

Go to **Setup > Administration Setup > Manage Apps > Connected Apps** and check that the correct app is listed:

Connected Apps

[Help for this Page](#) ?

Manage access to apps that connect to this Salesforce organization.

App Access Settings

Allow users to install canvas personal apps

View: [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

Action	Master Label ↑	Application Version	Permitted Users
Edit	Sage People Android	147.0	All users may self-authorize
Edit	Sage People iOS	238.0	All users may self-authorize

You can specify the settings for:

- OAuth policies

Our recommendation is not to use IP range restriction:

Set **IP Relaxation** to **Relax IP restrictions**:

IP Relaxation

Refresh Token Policy: Refresh token is valid until revoked

- Session Timeout value

Elapsed time after which an inactive session connection must be renegotiated.

- PIN length

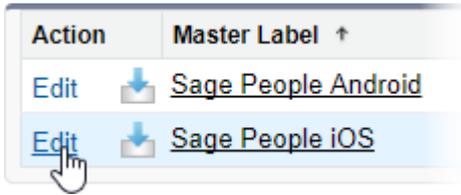
Number of digits required for the user's login PIN.

- PIN timeout

Elapsed time after which an inactive app requires PIN re-entry.

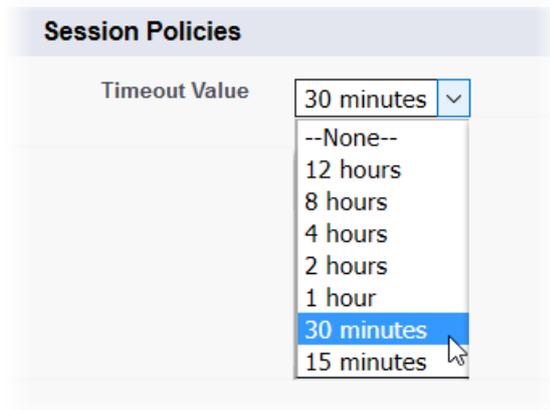
To edit settings:

1. On the Connected Apps page, select **Edit** for the App you want to edit:



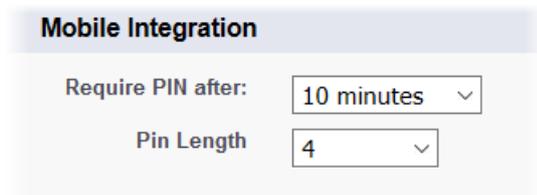
Sage People displays the Connected App Edit page.

2. In the **Session Policies** section select the **Timeout Value** picklist and choose the time value you want:



Shorter time values offer greater security by forcing session connection renegotiation after shorter periods of inactivity on the session.

3. In the **Mobile Integration** section:
 - o Select the **Require PIN after** picklist and choose the timeout value after which the app redisplay the PIN security screen.
 - o Select the **Pin Length** picklist and choose the number of digits users must enter for their Personal Identification Number.



4. Select **Save**.

Users must logout from the app and login again before changes you make take effect.

Profile Settings for Mobile

Profiles assigned to Team Members who are to use Mobile must include the following access permissions:

Administrative Permissions

API Enabled 

Visualforce Page Access

Package

fHCM2.CollaborationPortalCSS	HCM	
fHCM2.CollaborationPortalIndex	HCM	
fHCM2.CollaborationPortalMobileAndroid	HCM	
fHCM2.CollaborationPortalMobileios	HCM	
fHCM2.CustomLabelTranslations	HCM	

How do I set up a WX Process to Display on Mobile?

All WX Processes can be used on Mobile while some - typically those with fewer options and less complex displays - are ideal for the smaller screen size.

Mobile supports all WX processes except those listed in Processes Out of Scope (see page 12).

By default, processes are **not** shown on Mobile - you must select which ones are displayed:

1. Go to the WX Process Edit page.
2. Select **Show In Mobile**:

The screenshot shows the 'WX Process' edit form. At the top, there are 'Save' and 'Cancel' buttons. Below the title bar, a legend indicates that a red vertical bar next to a field name signifies 'Required Information'. The form contains several fields: 'Label' (Absence), 'Active' (checked), 'WX Service' (Time), 'Order' (10), 'Start Date' (15/10/2015), 'End Date' (15/10/2015), and 'Preferred Number Of Columns' (2). The 'Show In Mobile' checkbox is circled in red and is currently unchecked. Other checkboxes include 'Show Title In Tile' (checked) and 'Show Title In Detail' (unchecked). An 'Additional Information' text area is at the bottom. 'Save' and 'Cancel' buttons are also present at the bottom of the form.

3. Select **Save**.

Show In Mobile does not affect the availability of processes through a browser on a mobile device; it is used solely to switch a process on or off in the Mobile app.

WX uses responsive design, so process displays through a mobile browser automatically adapt to match the available screen size - there is no special configuration required.

Processes Out of Scope

All WX Processes are now supported except:

Hiring Manager

Internal Portal

Metrics Review

My Applications

Salary Planning

How do I set up Push Notifications?

Push notifications enable Mobile to receive information from Sage People when an Action Email event is triggered.

1. On Mobile, ensure that you have opted to receive notifications.
2. Decide which Action Event(s) you want to generate push notifications.
3. On the Action Event Details page, in **Push Notification Alert Message** enter the text you want to use as the alert message for the notification. This is typically a merge field used to return a value from the Team Member or Employment records:

The screenshot shows the 'Action Email Details' form with the following fields:

- Event: Absence (dropdown), Approve (dropdown)
- Email Template: Fairsail Templates (dropdown), Absence Approved (dropdown)
- PDF Template: [empty text box]
- HCM Form Definition: [empty text box]
- Description: [empty text box]
- Overrides:
- Push Notification Alert Message: [empty text box, highlighted with a red oval]

Buttons: Cancel, Save

Legend: **I** = Required Information

4. Select **Save**.

When an Action Event trigger event occurs for an Action Event with Push Notification configured:

- If Mobile is active, the alert is displayed and contains a link. Select the link to go directly to the relevant view - for example, the Team Member's absence request to enable approval.
- If Mobile is not active, a prompt is displayed enabling you to accept or reject the notification.
- The Actions list is updated to reflect the latest alert.

To check push registration details for a user account:

1. Go to **Setup > Administration Setup > Manage Users > Users**
2. Select the **Full Name** of the User:

<input type="checkbox"/>		Edit	McEvoy, Ben	ouser	benmc
<input type="checkbox"/>		Edit	Pendleton, Steve	SPend	stevep
<input type="checkbox"/>		Edit	Sheridan, John	psymm	vincew

3. On the User Detail page, for **Mobile Push Registrations**, select **View**:

Service Cloud User	<input type="checkbox"/>
Mobile Push Registrations	View
Accessibility Mode (Classic Only)	<input type="checkbox"/> 
High-Contrast Palette on Charts	<input type="checkbox"/> 
Send Apex Warning Emails	<input type="checkbox"/>

Sage People displays the Mobile Push Registrations page, including the Last Registration Date:

Mobile Push Registrations

This page lists mobile apps that are registered to receive push notifications.

Service Type	Namespace Prefix	App Name	Connection Token	Last Registration Date	Created Date
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Glossary of Terms

Connected App

An application that can connect to salesforce.com using Identity and Data APIs. Connected Apps use the OAuth 2.0 protocol for authentication, Single Sign-On, and access token acquisition, while enabling administrators to control who uses the application.

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