PeoplePoint365

PeoplePoint 365 is a **HR** management software solution with themes of functionality that cover core HR, time and attendance, talent management, governance, expenses, employee on-boarding/off-boarding and change management. A **context driven** portal surfaces relevant information to multiple views, providing **self-service** access for employees, powerful reporting and real-time dashboards for HR professionals, Line Managers, IT and Payroll. Our platform is designed to work with **Office 365** and with **SharePoint on-premises.**

PointSolutions
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Contents

Employee Record Management

Core to PeoplePoint 365 is the Employee Record and the intuitive user interface. These are designed to allow users to manage records in a simple manner. There are over 100 employee data fields included, but a key aspect of the system is that organisations can add as many employee data fields as required – either at the outset to map to their current employee data-set, or add fields in as an on-going process to fulfil requirements as the business develops.

In addition to unlimited data fields, the Employee Record forms allow organisations to:

- Group data under expanding and collapsing groups
- Facilitate tabs to separate data into different sections and
- Build different stakeholder forms for access to the employee information

These forms control the security aspect of the Application – who can see and edit, which fields, within an Employee's Record.

As part of the implementation process an organisations existing employee data-set is mapped and imported into the system to provide a start point to extend and utilise all the additional features of PeoplePoint 365.

The core employee record is the 'parent' record to all data and processes relevant to an employee – meaning, any information processed in the system is tagged back to the unique employee ID. This facilities the Employee Record to be extended to display all associated information – i.e. all employee documents; an employees skills and competencies; an employee's remuneration and benefits log etc.

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Employee Record Management

- User interface designed to simplify the management of records, organisations have the ability to add to the 100 fields already provided for employee records.
- Users are provided the ability to map out the current employee data-set at the implementation stage of the product.
- Organisations have the ability to group data under expanding and collapsing groups allowing for data to be more organised within each record.
- Stakeholder forms are created in order to manage the security permissions (i.e. who can see certain employee data).
- Organisations can utilise their existing employee databases by importing this into the system as a starting point.
- The employee record is the parent record to all data, information and files relevant to the employee.
- Record can be extended to show any information the organisations deems necessary and can hide information based on security permissions of the user viewing the record.
- The change management process for employee data can be accessed from the record.
- The record can be used as a central point for viewing related information to the employee from the entire HR system.
- Employees can add a profile picture to their record for personalisation which is also fed into the organisational chart.

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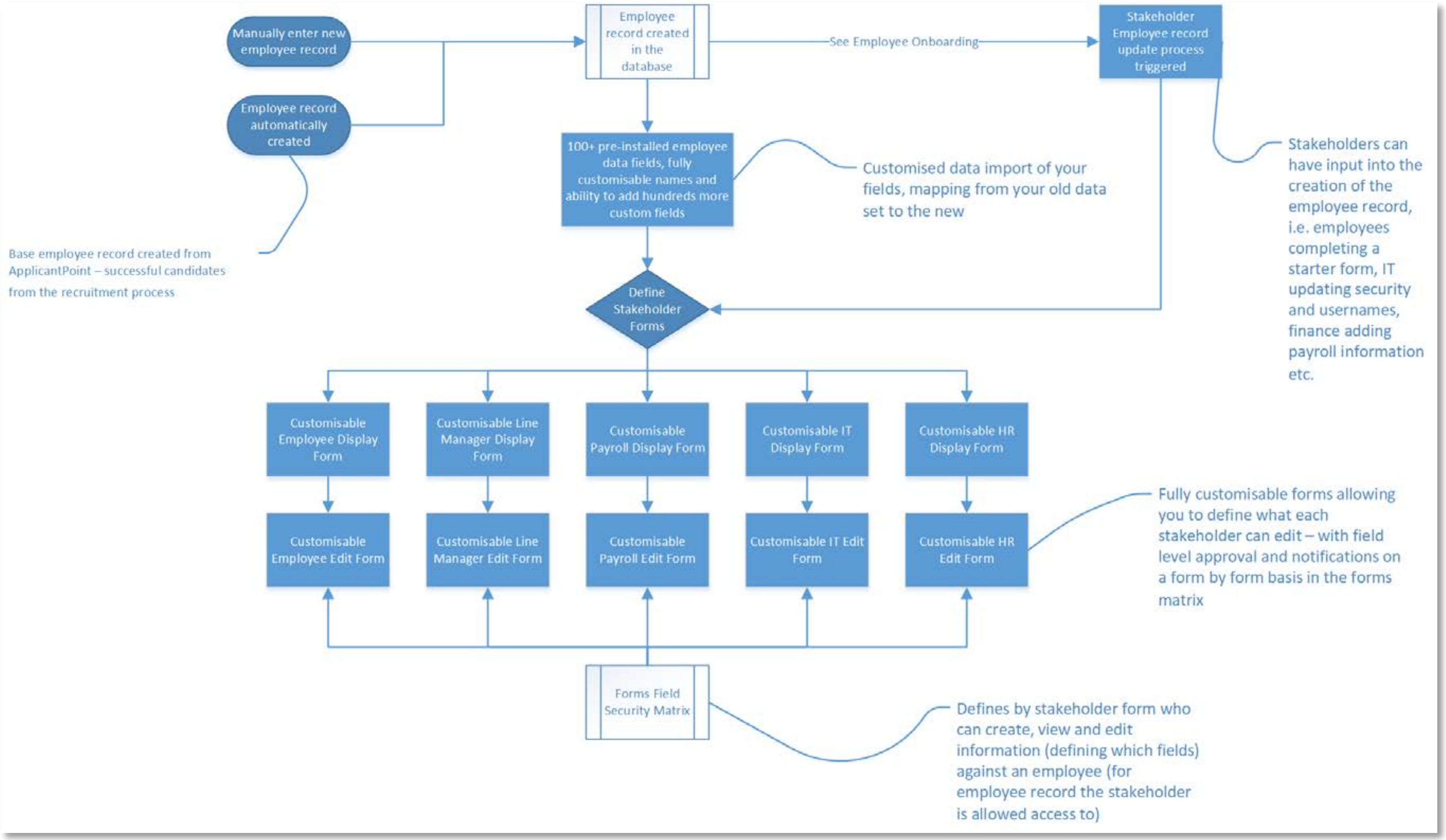
Employee Record Management



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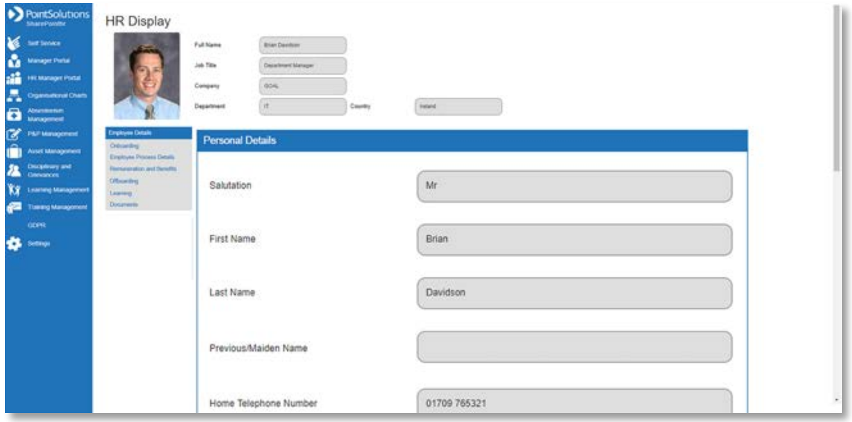
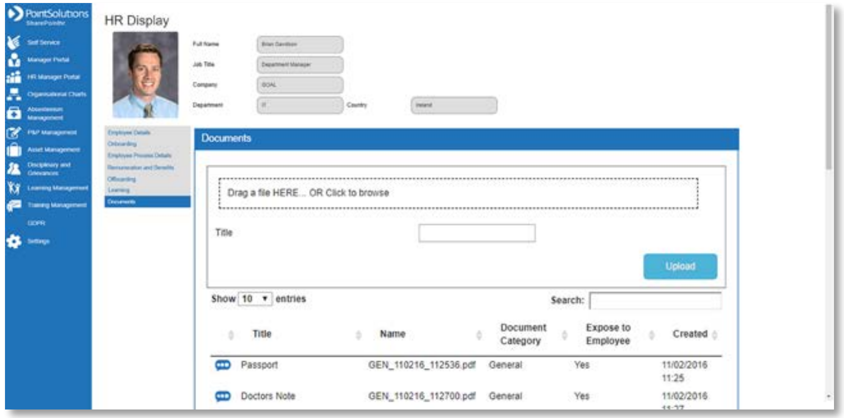
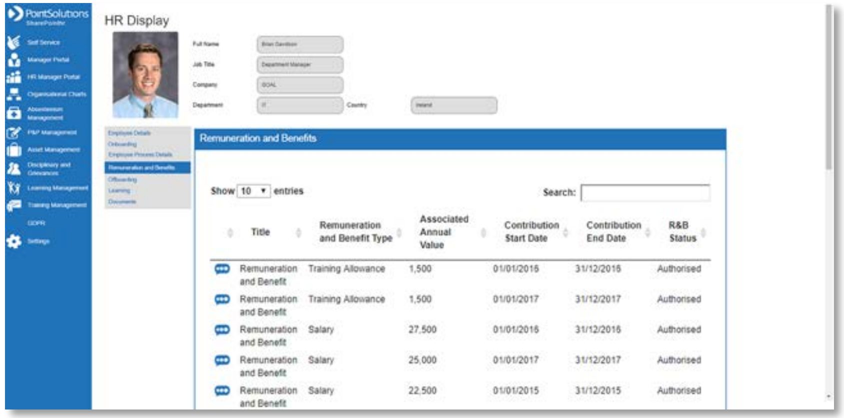
Employee Record Management



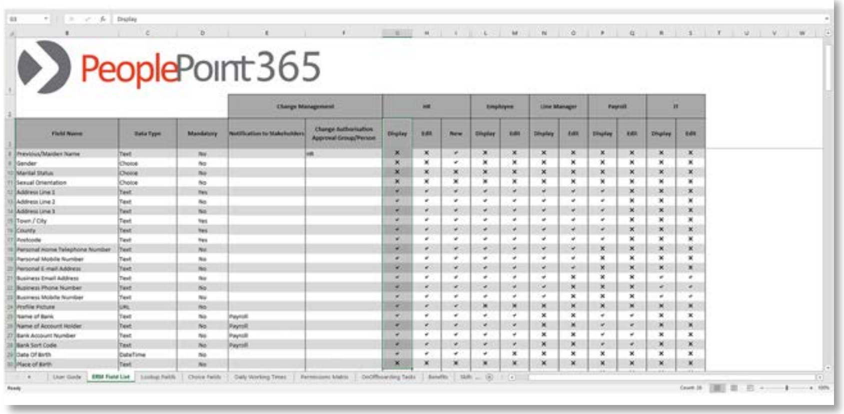
Employees and Users with appropriate permissions are able to access their Employee Record.



The Employee Record manages Documents applicable to an Employee, such as CVs and references.



The Remuneration and Benefits Audit Log is visible within the Employee Record.



The Employee Record Management Implementation Pack is used to dictate who can access what information.

Employee Record Manager

The Employee Record (ER) Manager feature with PeoplePoint 365 to serve as an aid to HR Managers, Administrators and Professionals.

The tool enforces process set-up policies and alerts administrators if any employee record information is incorrectly set that would result in a specific process failing (i.e. no holiday authoriser set for a specific employee).

Employee Record Manager

The ER Manager was built by the request of clients, and is an excellent example of how PointSolutions' software assurance works – a client suggested that the system delivers a lot of functionality and it would be helpful if, rather than having a checklist to set-up an Employee Record, that the system would automate (where possible), guide and alert users where new Employee Records are not set-up fully or correctly.

Ultimately, the ER Manager is a 'wrapper' around the Employee Record that proactively ensures that all assigned processes relating to an employee will work, and where there is an issue it surfaces this to allow administrators to address before an Employee and/or Stakeholder is affected.

A key feature of the ER Manager is to allow HR to assign security policies without involving the IT department. This is specifically aligned to HR processes and does not affect other security policies within an organisation, but allows HR to take ownership of set-up and changes, as to who can do what and who can access/edit information in the HR system, removing the reliance and potential bottleneck on IT.

Employee Record Manager

- Enables the system to provide clear and intuitive validation of information against the employee records.
- The employee record manager allows HR (and/or other defined stakeholders) the ability to see where key data is missing from the system relating to a specific employee, this removes the onus on IT
- By managing the record the ER Manager is able to see any possible errors that will occur in a process relating to employee data allowing for the issue to be rectified before affecting anyone.
- The system has the ability to inform a stakeholder if incorrect employee information will result in a process failing within the system.
- As part of PointSolutions' application suite there is software assurance, employee record manager is an example of this as it was requested by a client. It essentially automates the creation of employee records and alerts relevant users to any error.
- The employee record manager has the ability to remove IT from the process of assigning security policies, specifically aligned with HR processes meaning no others are affected.
- HR have the ability to take control of setting-up the data requirement policies for an employee record based on rules within the organisation, if required.
- The employee record manager allows onboarding and offboarding tasks to be allocated to specific stakeholders within the business.
- The employee record manager can provide an overview of the onboarding and offboarding task progress to enable focus on ensuring that onboarding/offboarding is completed in full.

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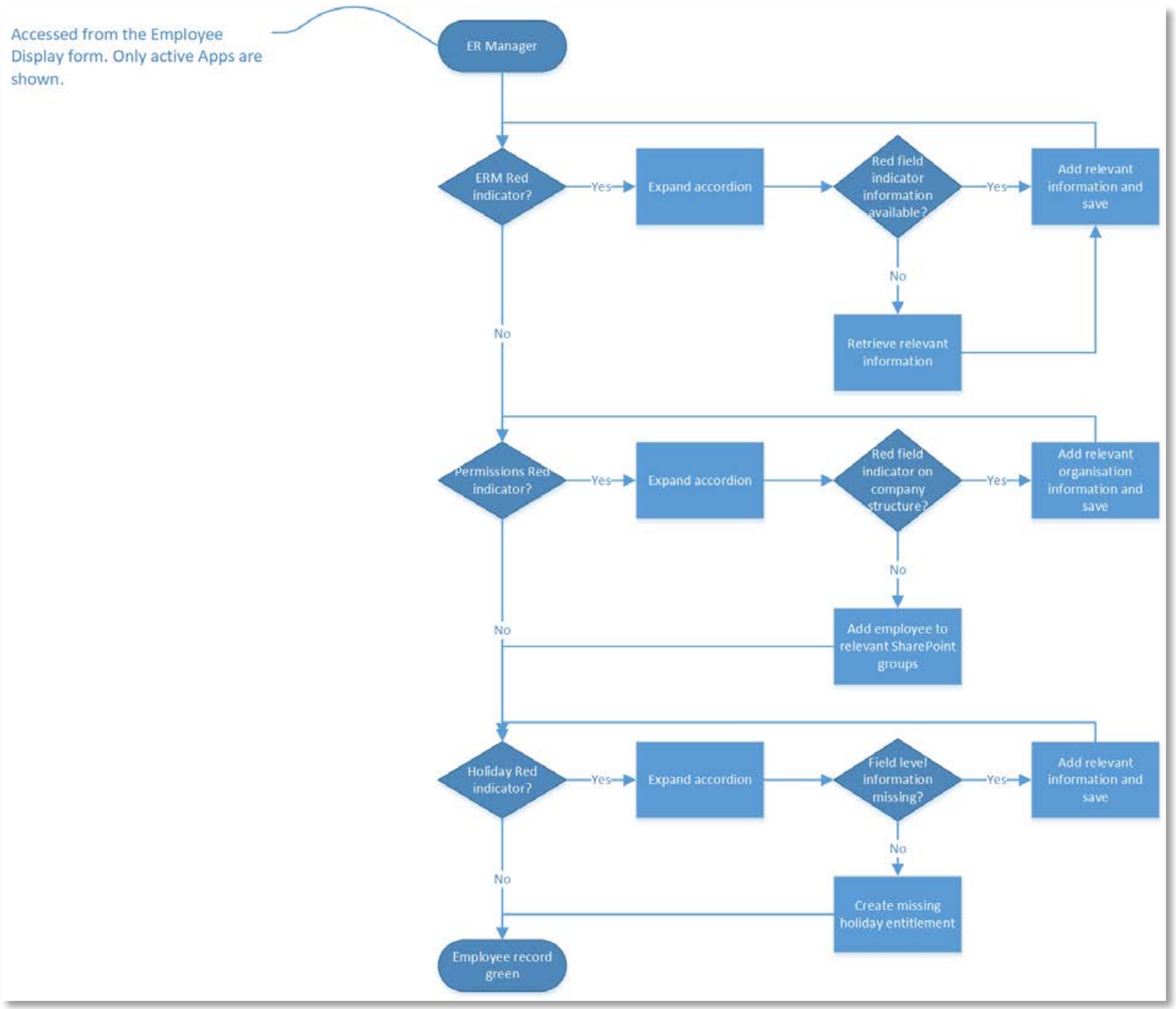
Employee Record Manager



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Employee Record Management
Employee Record Manager
Employee Document Manager
Employee On-Boarding
Employee Change Management
Employee Off-Boarding
Organisational Charting
Holiday Management
Absenteeism Management
Policy & Procedure Management
Timesheet Management

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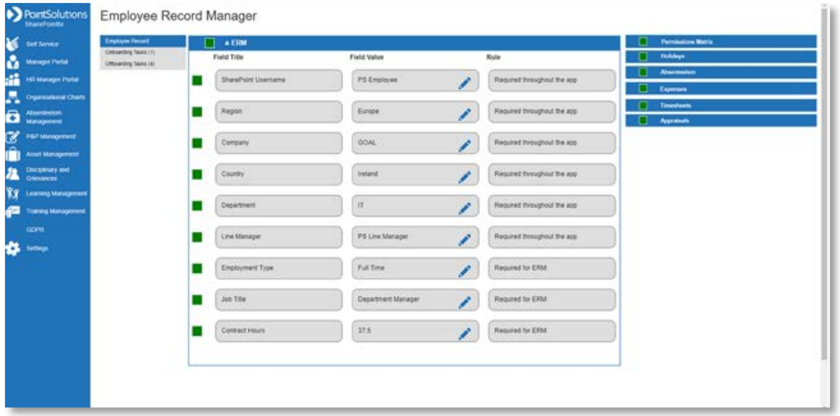
Employee Record Manager

The Employee Record Manager surfaces an overview of Employee Records and completion statuses.



Sections of the Employee Record Manager can be expanded to view and edit details within the fields.

Employee Document Manager

PeoplePoint 365 uses the SharePoint Document Management System for managing all Employee documents, exploiting the many features of SharePoint Document Management, such as version controls, labelling/tagging and permissions.

To enhance the user experience, PeoplePoint 365 includes a document uploader feature within the Employee Record that allows the dragging of documents into the records, which auto labels to the Employee, prompts for additional labels to be added if necessary (i.e. type of document; owner etc.) and invokes the relevant security policies assigned to the Employee and the Document.

Throughout the processes within PeoplePoint, Documents are auto-filed, tagged and security applied as part of the specific process – i.e. doctors notes uploaded in an absenteeism record; expenses receipts attached to an expense claim; supporting appraisal documents etc.

A major added-value of utilising the SharePoint Document Management System is in relation to GDPR – in that as part of the Office 365 framework lies the Microsoft Security and Compliance Centre. The Security and Compliance Centre facilitates document retention policies that are able to be tailored to the organisation's needs, i.e. CV's are auto-deleted after 6-months, disciplinary letters after 1-year etc.

Such policies would apply to your HR system (if required) to ensure consistency of policy compliance (i.e. the same policy would be applied to email and HR systems for deleting CV's, ensuring all copies of the CV are deleted).

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Employee Document Manager

- PeoplePoint 365 utilises a SharePoint document library to manage all employee documents, giving the system the ability to exploit the rich feature set of SharePoint document management.
- Within the system there is a feature allowing users to drag and drop files in to the employee record to upload them.
- When dragged and dropped on to the file the document is tagged against the employee record and the document, and pushing the user to further tag the document for ease of categorisation and searching in the future.
- The uploading of documents to an employee record will automatically apply the relevant security policies.
- Some processes within PeoplePoint 365 allow for documents to be automatically filed, tagged and provided with security permissions (i.e. a doctor's note being attached to an absence record).
- The utilisation of SharePoint document manager allows for major value to be added in terms of GDPR, with the ability to set and carry out retention policies that will be consistent throughout the organisation and across all applications.
- Retention policies can be defined by type of document meaning different documents can be retained for different lengths of time and have different actions for retention
- All documents have version history on them so any changes / updates to a document will be tracked along with being date, time and user stamped
- Multiple types of documents are supported, giving flexibility of documents that can be stored (I.e. Microsoft Office documents, PDF document, image documents etc...).
- Documents can be surfaced to stakeholders and limited by document type. With the employee taken as a stakeholder, they can have full access to their documents ultimately providing full transparency to the employee.

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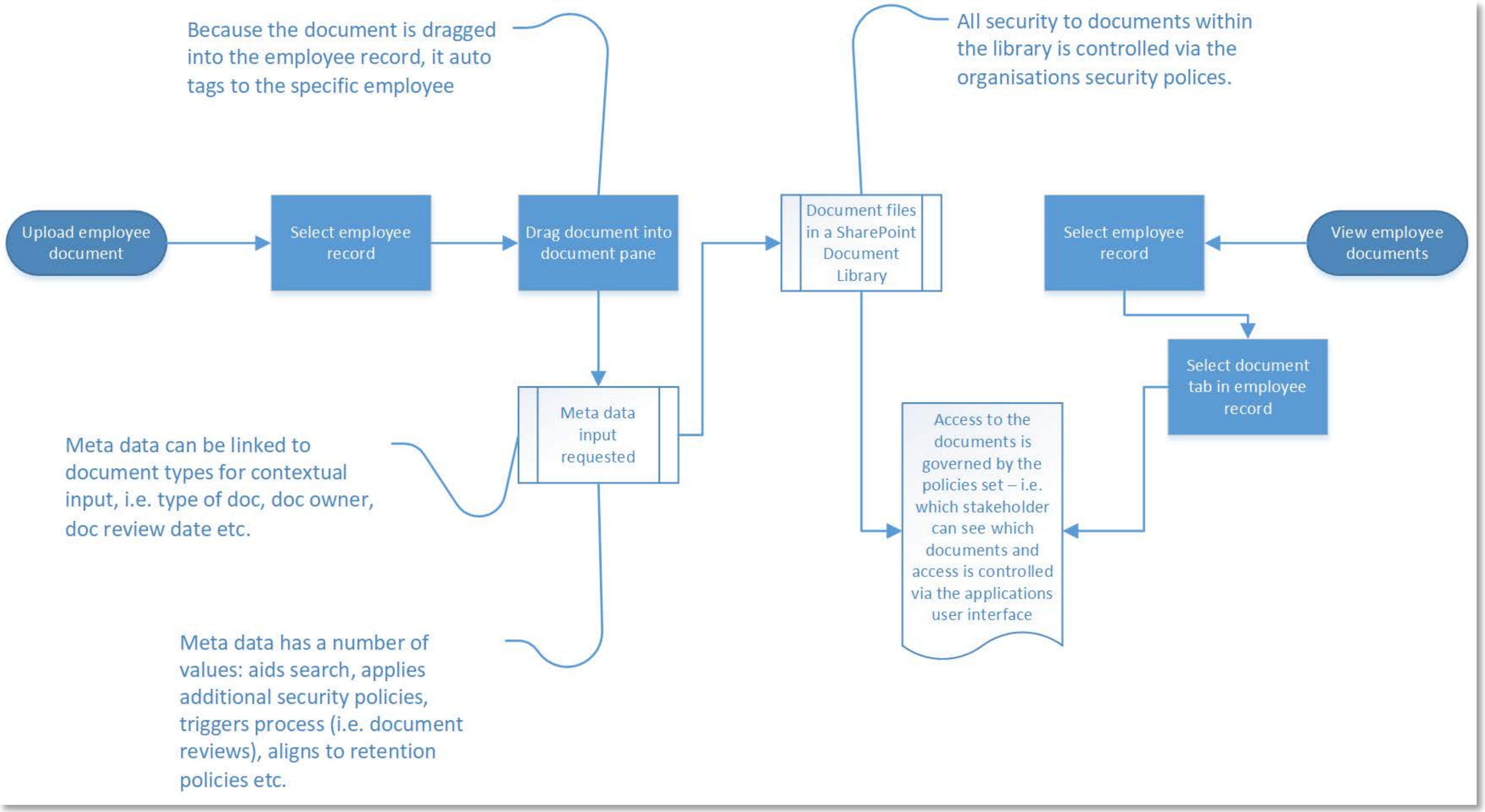
Employee Document Manager



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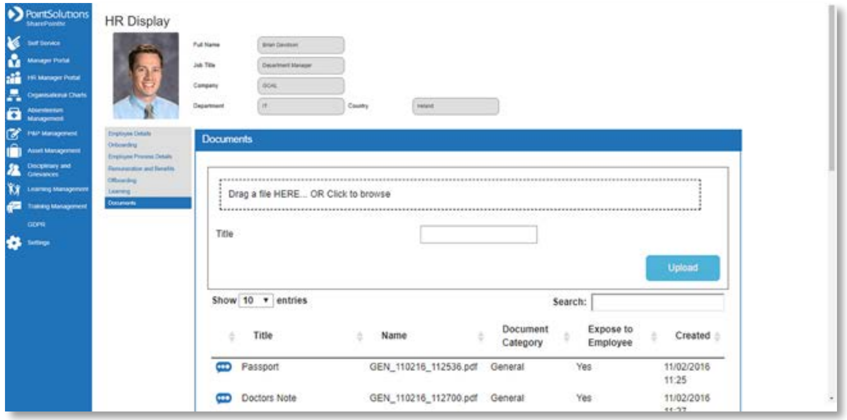
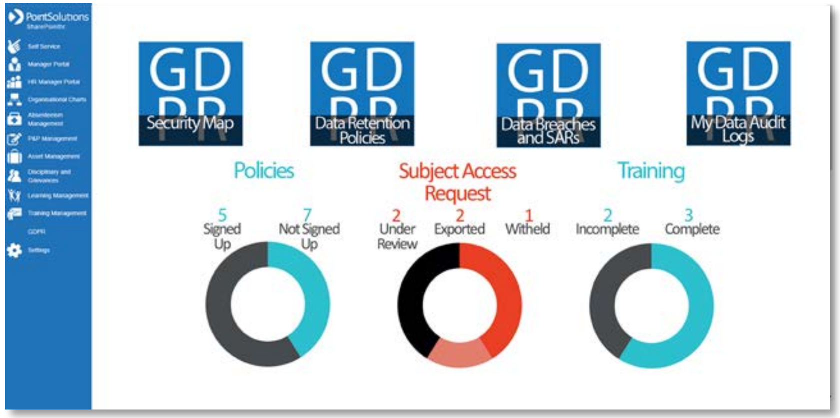
Employee Document Manager



The Employee Record Manager contains an internal Document Uploader and surfaces current Documents.



GDPR Compliance is tracked as part of the GDPR Dashboard. Users can view GDPR KPIs, retention policies, raise SARs, etc.

Employee On-Boarding

PeoplePoint 365 provides an On-Boarding feature that assigns On-Boarding Tasks to Stakeholders and presents HR with an overview as to the completion status of Tasks.

Stakeholder Task Templates
Stakeholder Task templates can be created (usually based on job role) and the tasks can be high level (i.e. 1 task per stakeholder to do their 'stuff') or prescribed (i.e. a checklist of specific tasks per stakeholder). Either way, the stakeholder is alerted to their tasks and HR have a status overview delivering both self-service and management overview functionality.

Common Stakeholder Levels
The common stakeholders are:

- Employees
- Line Managers
- HR
- IT
- Payroll

However, the system allows for classification of any number of stakeholders.

With direct reference to an Employee's On-Boarding Process, their Tasks can link into the process elements of the system (review and sign all relevant policies, complete their training and induction etc.) as well as updating Employee Record information (i.e. complete the Employee starter form to update bank details, contact information etc.).

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Employee On-Boarding

- PeoplePoint 365 has a feature that allows stakeholders in an on-boarding process to automatically be allocated relevant tasks.
- HR will be provided with an overview of all the relevant stakeholder tasks and the completion status with regards to onboarding an employee.
- Tasks that are set are usually contextual to a job role and can concern as many stakeholders as required.
- Stakeholders within tasks are defined by the organisation and can be any group of staff members, in conjunction with their responsibilities or their job role.
- Specifically, an Employee being on-boarded will be set tasks which can link to the processes in the system (i.e. Review and sign relevant policies).
- Tasks also have the ability to be linked directly to updating or adding information to the employee record that is required (i.e. bank details).
- Employee on-boarding can start before the Employee's first day as the employee can be given access to the system to be able to start to work on some of their on-boarding tasks (i.e. reading and signing up to policies and procedures).
- Can be started directly from the applicant tracking process in ApplicantPoint 365 (if App deployed).
- Utilises the central tasks system in PeoplePoint 365.
- Intuitive and interactive user interface for allocating/viewing tasks to enhance user experience and provide an efficient experience to the user.

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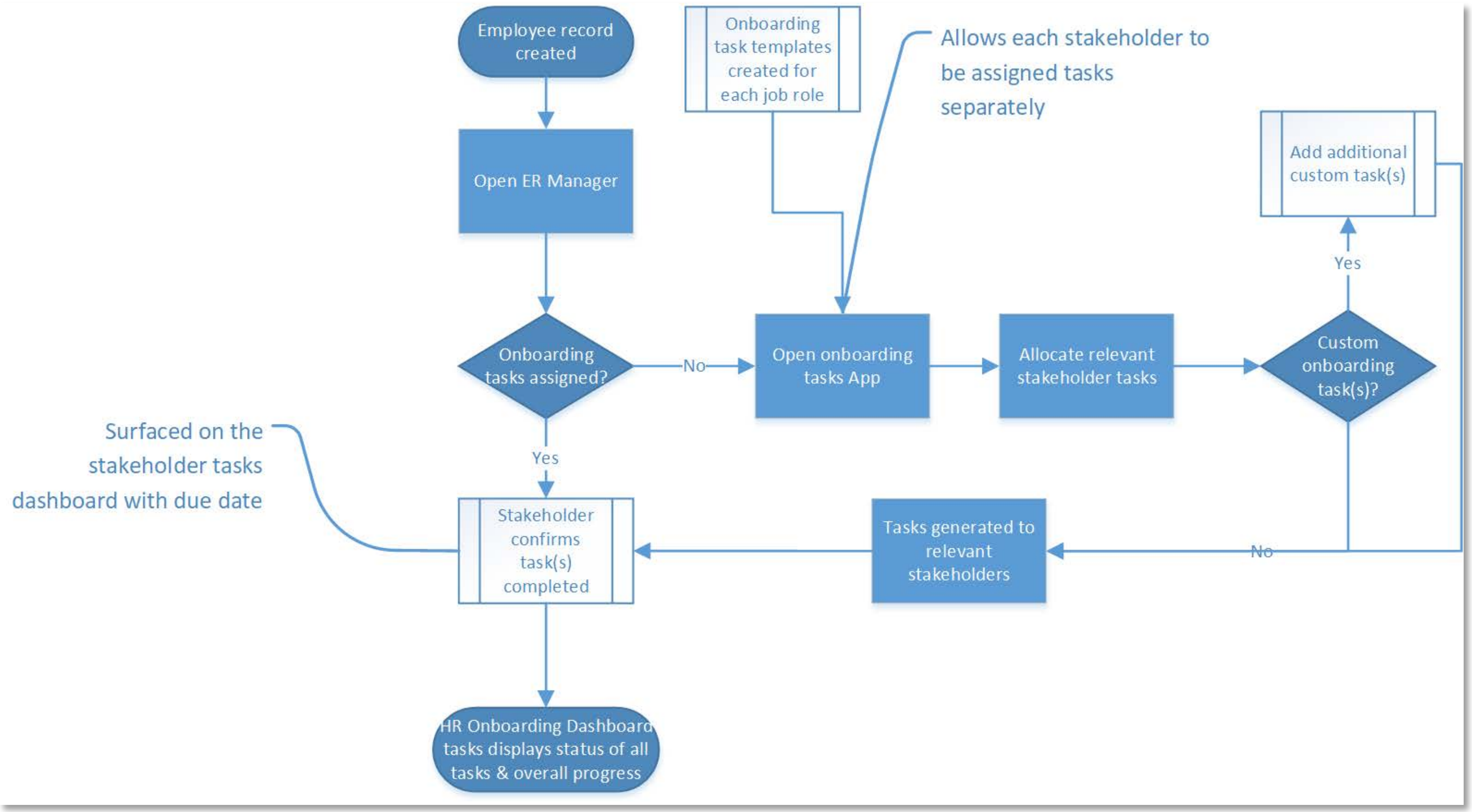
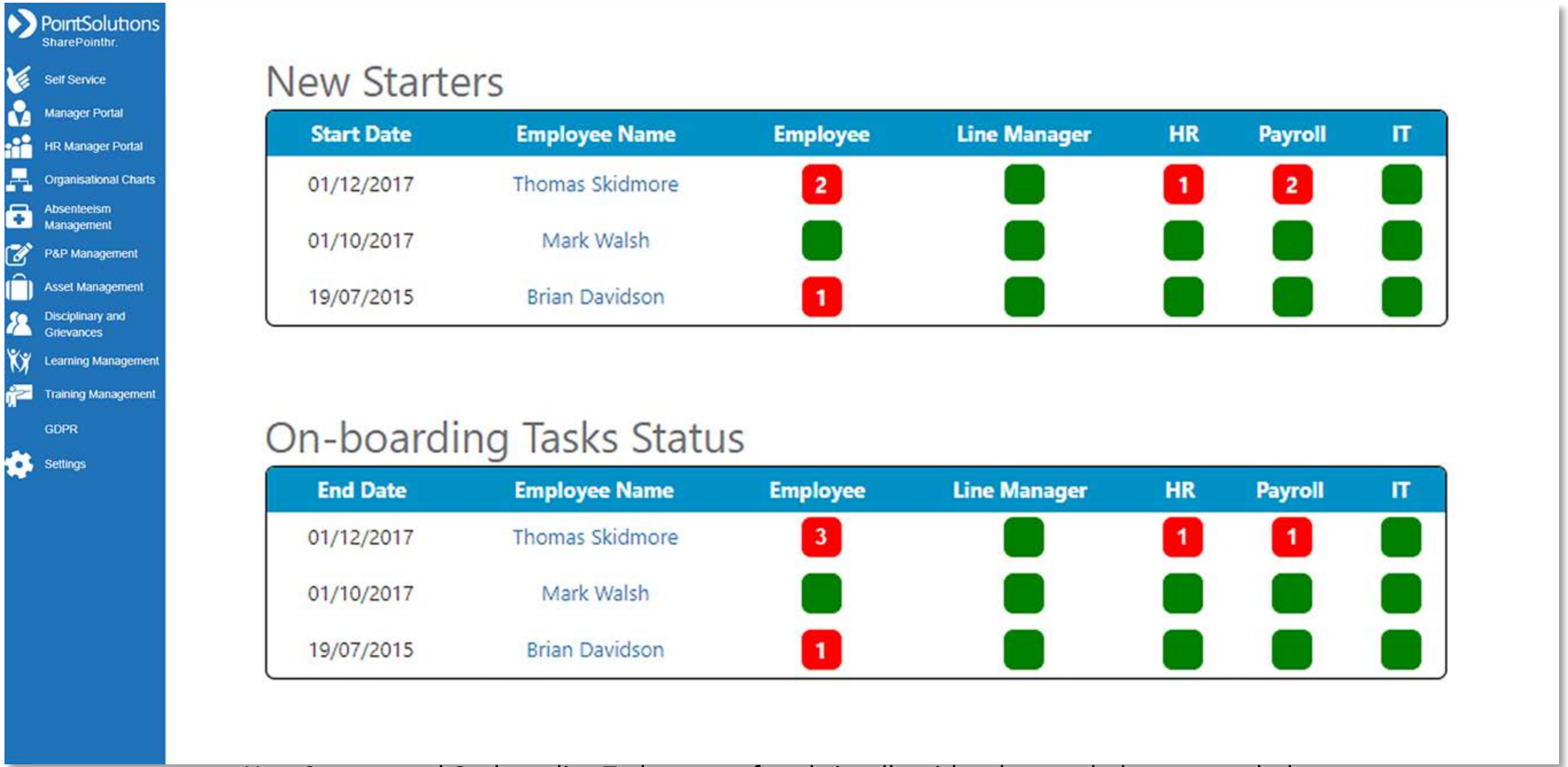
Employee On-Boarding



Employee On-Boarding



New Starters

Start Date	Employee Name	Employee	Line Manager	HR	Payroll	IT
01/12/2017	Thomas Skidmore	2		1	2	
01/10/2017	Mark Walsh					
19/07/2015	Brian Davidson	1				

On-boarding Tasks Status

End Date	Employee Name	Employee	Line Manager	HR	Payroll	IT
01/12/2017	Thomas Skidmore	3		1	1	
01/10/2017	Mark Walsh					
19/07/2015	Brian Davidson	1				

New Starters and On-boarding Tasks are surfaced visually with colour-coded status symbols.

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Employee Change Management

Employee Record change management is governed by the security policies set within the system, which defines who can see, who can edit and in respect to edit, whether this is auto-update, auto-update with notification or authorisation required for update.

Employee Self-Service

The Employee self-service change form (normally set to auto-update with Notifications on some fields) allows Employees to update pre-specified fields for which they have ownership to keep up-to-date (i.e. personal contact and next of kin information). Some of these fields may invoke Notifications to other Stakeholders (i.e. bank detail changes to payroll).

Authorisation

Other change forms (i.e. Line Managers) can be set to require authorisation, such that they can request changes but they need to be authorised – saving on emailing/telephone communications and ensuring there is a request Audit Trail within the system. Also efficiency gains are achieved in that, upon approval, the change automatically updates the Employee Record and no re-keying is required.

All authorised requests create review tasks for the specified approver/s, and as part of the approval process, update dates can be set to allow requests to be processed in advance of a change.

A comprehensive Audit Log is updated logging all request and authorisation data.

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Employee Change Management

- Employee change management within PeoplePoint 365 is managed by the security policies set within the system.
- Security policies dictate who can initiate a change request alongside which information changes can be made to based on the persons relationship to the employee (i.e. line manager).
- Employees are provided with a self-service change request form which allows them to be responsible for their own information and make changes where required to ensure data is relevant and up-to-date.
- Authorisation can be applied to a change request at field level, meaning that when a change request is completed if certain information to be changes requires authorisation this can happen by the relevant stakeholder
- Forms and fields have the ability to provide notifications to both the employee and relevant stakeholders when the change goes live.
- Change requests can be processed in advance by having an effective date set against the change, this allows for forward planning making the system proactive instead of having to be reactive to data changes.
- All authorisations requests will begin the process of allocating a task to the specific decision maker/manager/authoriser etc.
- When an employee record is changed this systematically updates a comprehensive audit log which tracks all changes that are made or requested.
- Employees have access to their audit log, supporting GDPR rights that an employee can understand who has access, and to what, in respect to their data
- Stakeholders (I.e. Finance / Payroll) can have reported all relevant changes that affect their processes (I.e. bank detail changes etc.).

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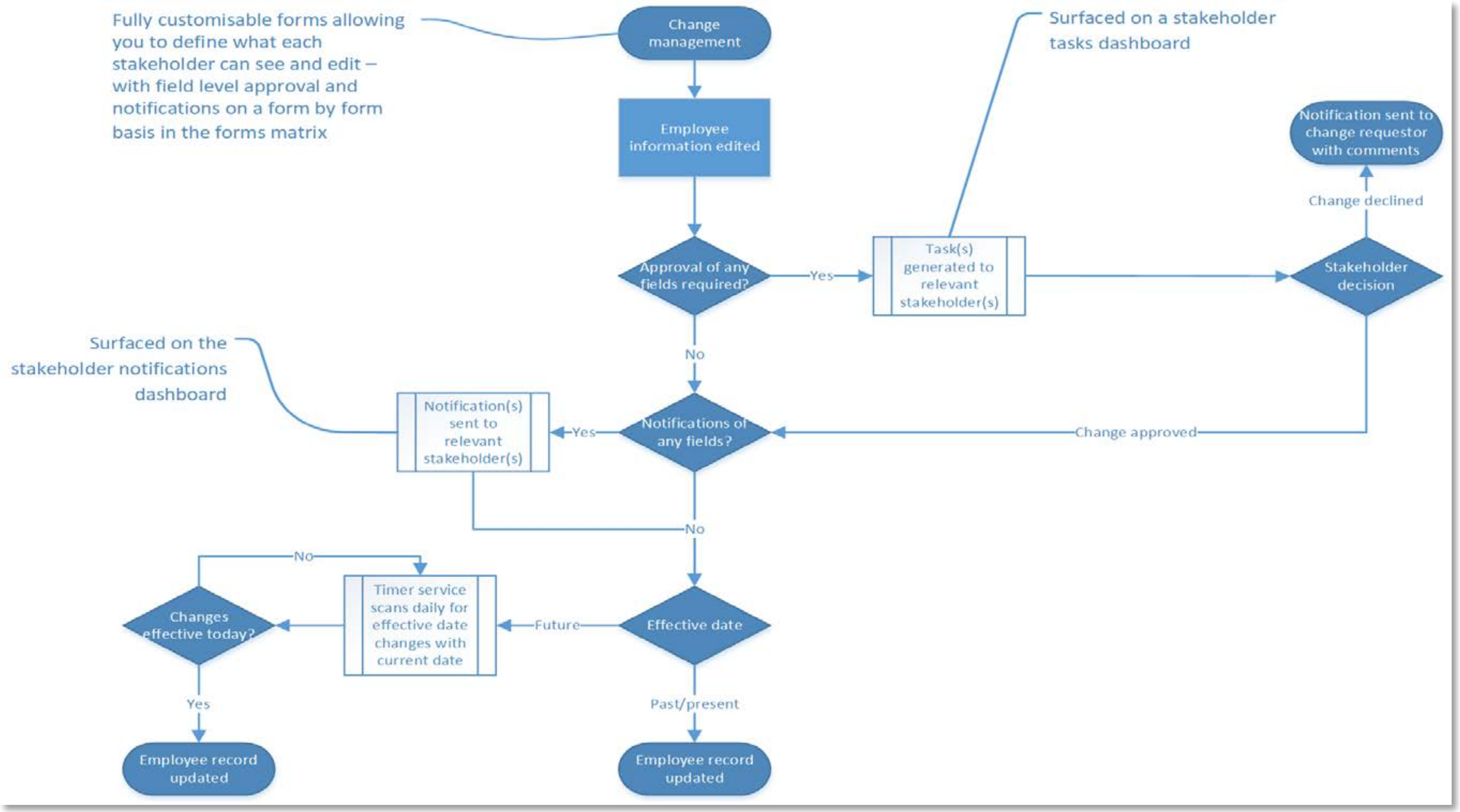
Employee Change Management



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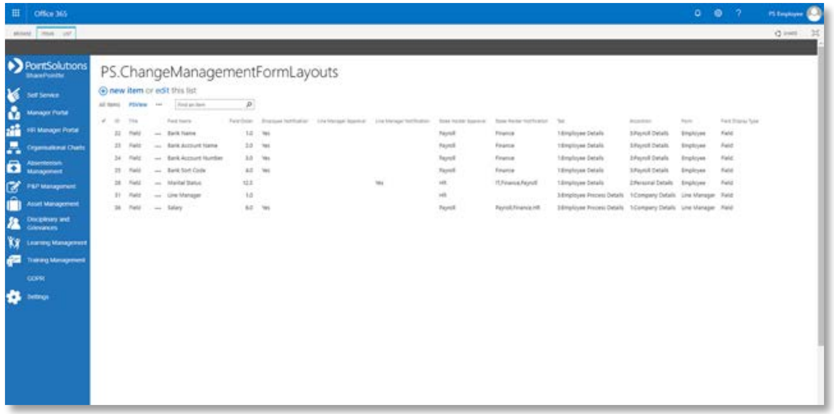
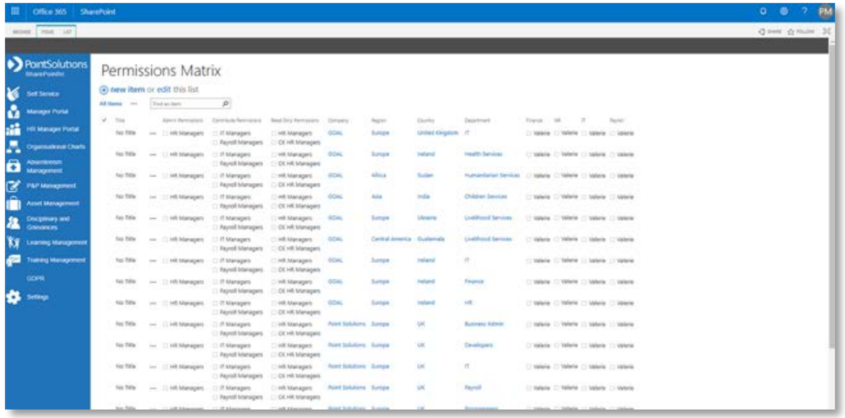
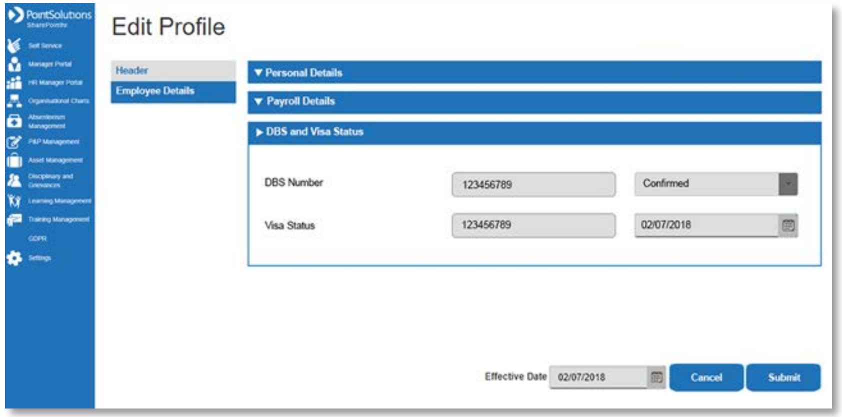
Employee Change Management



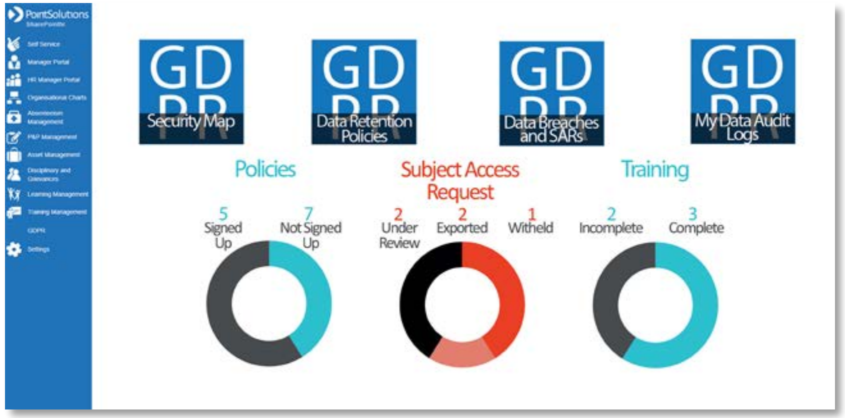
The Change Management Form records changes and outlines where data sits on the Employee Record.



PointSolutions Apps follow a security matrix to enable access and edit permissions where appropriate.



Employees can edit their own Employee Record through the Employee Details tab.



GDPR Compliance is tracked as part of the GDPR Dashboard. Users can view GDPR KPIs, retention policies, raise SARs, etc.

Employee Off-Boarding

PeoplePoint 365 provides an Off-Boarding feature that assigns Off-Boarding Tasks to Stakeholders and presents HR with an overview to an Employee's exit status.

Stakeholder Task Templates

Stakeholder Task templates can be created (usually based on job role) and the tasks can be high level (i.e. 1 task per stakeholder to do their 'stuff') or prescribed (i.e. a checklist of specific tasks per stakeholder). Either way, the stakeholder is alerted to their tasks and HR have a status overview delivering both self-service and management overview functionality.

The common stakeholders are:

- Employees
- Line Managers
- HR
- IT
- Payroll

However, the system allows for classification of any number of Stakeholders.

With direct reference to a Line Manager's Off-Boarding process, their Tasks can link into the process elements of the system (undertake exit interview, sign-off return of all assets etc.) as well as updating Employee Record information (i.e. leave date, leave status etc.). IT could be allocated tasks to remove system access on the confirmed leave date and payroll to reconcile pay, holidays etc.

Once exit is confirmed the Employee Record and all information remains in the system with their exit status excluding from (certain) reports and any deletion of data is governed by an organisations GDPR retention policy.

Employee Off-Boarding

- In conjunction with employee on-boarding, PeoplePoint 365 can also facilitate the off-boarding process.
- The system can set tasks to stakeholders that are aligned with the off-boarding process / requirements.
- Task templates are created for stakeholders usually on a contextual basis referring the job role.
- Off-boarding tasks can be assigned to an individual within the organisation or a group / team. Once a member of the team completes the task, this is completed for all team members.
- HR are provided with status views showcasing both self-service and management overviews usually relating to the Off-Boarding status.
- Organisations commonly specify stakeholders as; Employees, Line Managers, HR, IT and Payroll but there is the ability to add in as many stakeholders as desired.
- Directly, a line manager can be set tasks that link to processes such as signing off returned assets also, they can be set to change information that requires updates.
- Upon the completion of the offboarding process data is held in conjunction with the organisation retention policies which should be compliant to GDPR.
- Offboarding tasks can extend beyond the leave date of the employee, this may be required for processes such as payroll who will need to produce paperwork after the final pay.
- Employee off-boarding process can lead into the applicant tracking system, ApplicantPoint 365, if available

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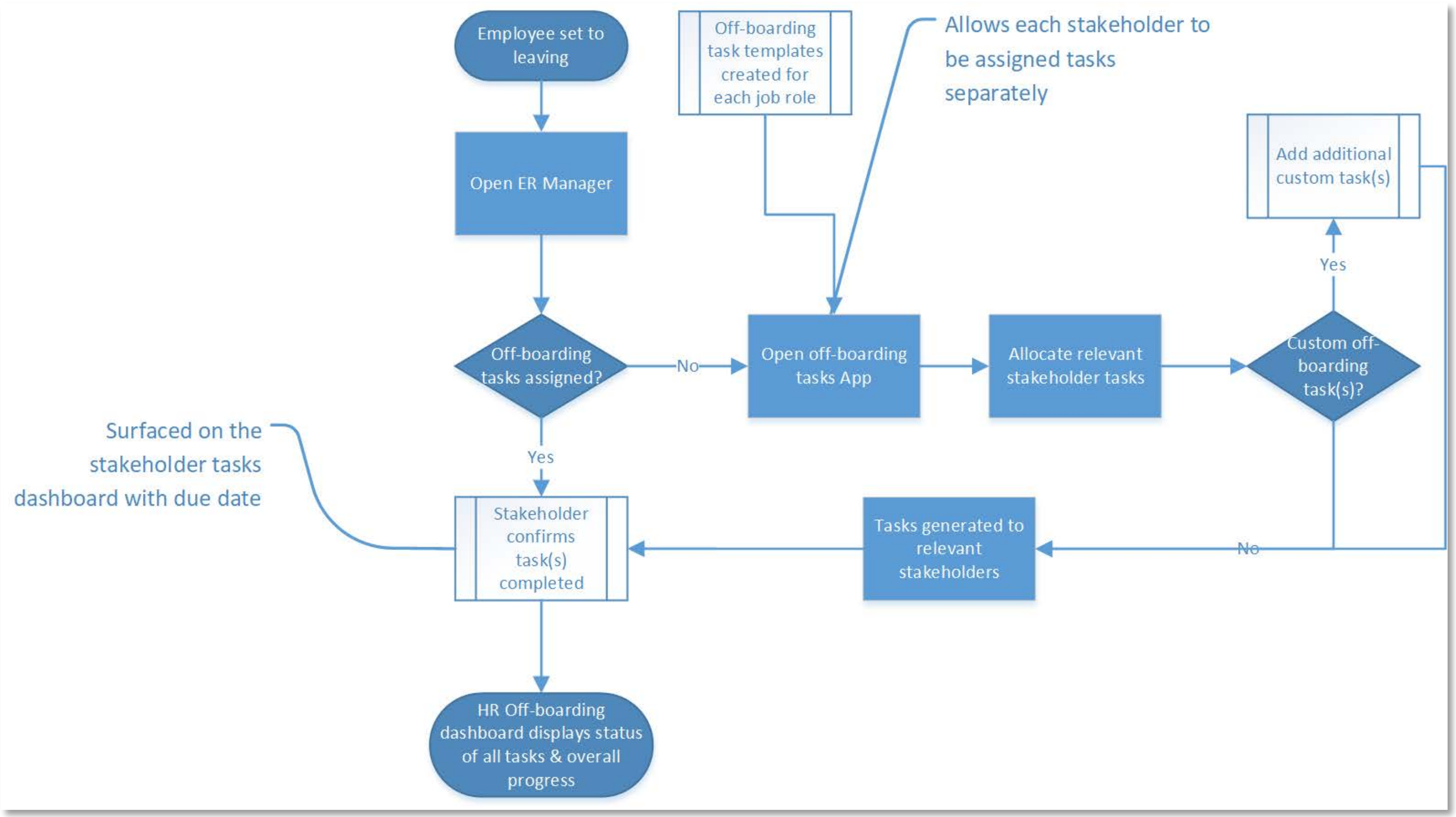
Employee Off-Boarding



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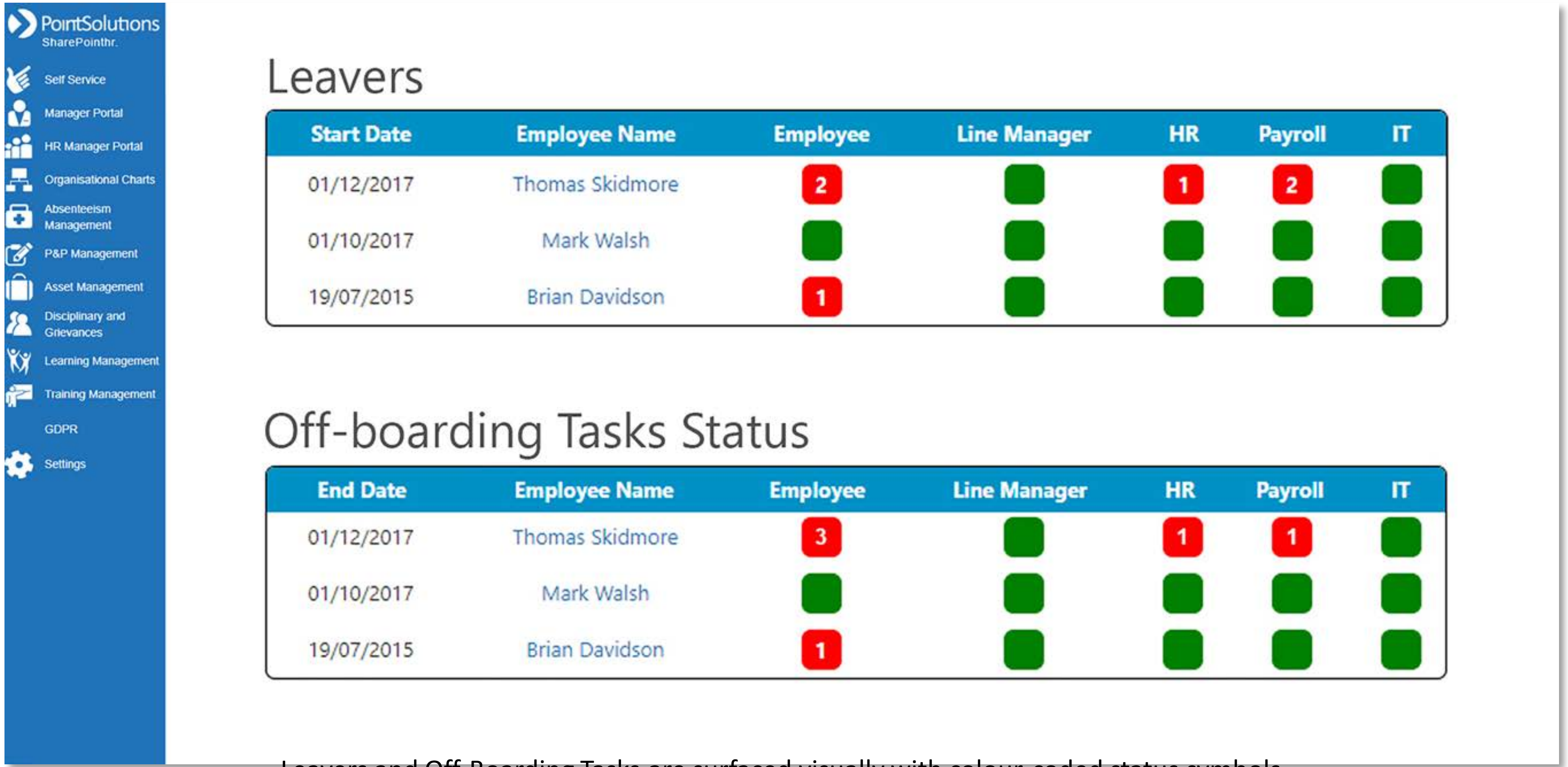
Employee Off-Boarding



Leavers

Start Date	Employee Name	Employee	Line Manager	HR	Payroll	IT
01/12/2017	Thomas Skidmore	2		1	2	
01/10/2017	Mark Walsh					
19/07/2015	Brian Davidson	1				

Off-boarding Tasks Status

End Date	Employee Name	Employee	Line Manager	HR	Payroll	IT
01/12/2017	Thomas Skidmore	3		1	1	
01/10/2017	Mark Walsh					
19/07/2015	Brian Davidson	1				

Leavers and Off-Boarding Tasks are surfaced visually with colour-coded status symbols.

Organisational Charting

PeoplePoint includes a dynamic Organisation Chart that is created from the live employee data and is published in a web page. This ensures that the chart can be viewed regardless of how many levels/employees are displayed – opposed to printing, which is invariably tricky to output as more Employees are listed (i.e. page breaks, page width etc.).

Because the chart is dynamically rendered from the Employee Database, any changes are affected immediately (i.e. change of department, change of line manager etc.).

Employee
From the perspective of an Employee, the chart displays both the immediate upstream and downstream links as to where they sit within the organisational structure.

Management
From Managements perspective, they can select at what level to view the chart in relation to their defined organisational structure within the system (i.e. organisation, company, group, region, department etc.).

Employee Cards

The Employee Cards within the chart can be configured to display any information from their employee record – facilitating contact cards (i.e. job title, contact numbers, email addresses etc.).

There is also a gap chart, where a planned organisational structure is overlaid with the current status to identify any gaps in the plan.

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Organisational Charting

- PeoplePoint 365 provides an organisational chart which is derived from the employee data in the organisation.
- The chart being digital ensures anyone can view it and also that there is no need to print in order to pass it on.
- The chart facilitates real-time updates so that if any structural changes are made then it will be mirrored in the chart automatically.
- Regarding the viewpoint of an employee they are able to view where they sit within the organisation and can view the organisation from all levels in relation to their defined structure.
- Within the organisational chart lies employee cards, these cards can be set to surface employee information (for example contact information).
- Employee profile pictures are presented on cards to allow a face to be put to a name, this is especially useful for people just joining the company or maybe if an employee has recently moved teams.
- PeoplePoint 365 can also facilitate a gap analysis by overlaying the Planned structure with the current and identifying any gaps within.
- A company-wide organisational chart is also available which can show the entire company or be filtered by one or multiple defining elements of the company structure (i.e. country or department).
- Intuitive and rich user interface for optimal user experience.
- Data can be exported to Microsoft Excel which in turn can be linked to Microsoft Visio for the ability to be printed or exported to PDF.

Organisational Charting

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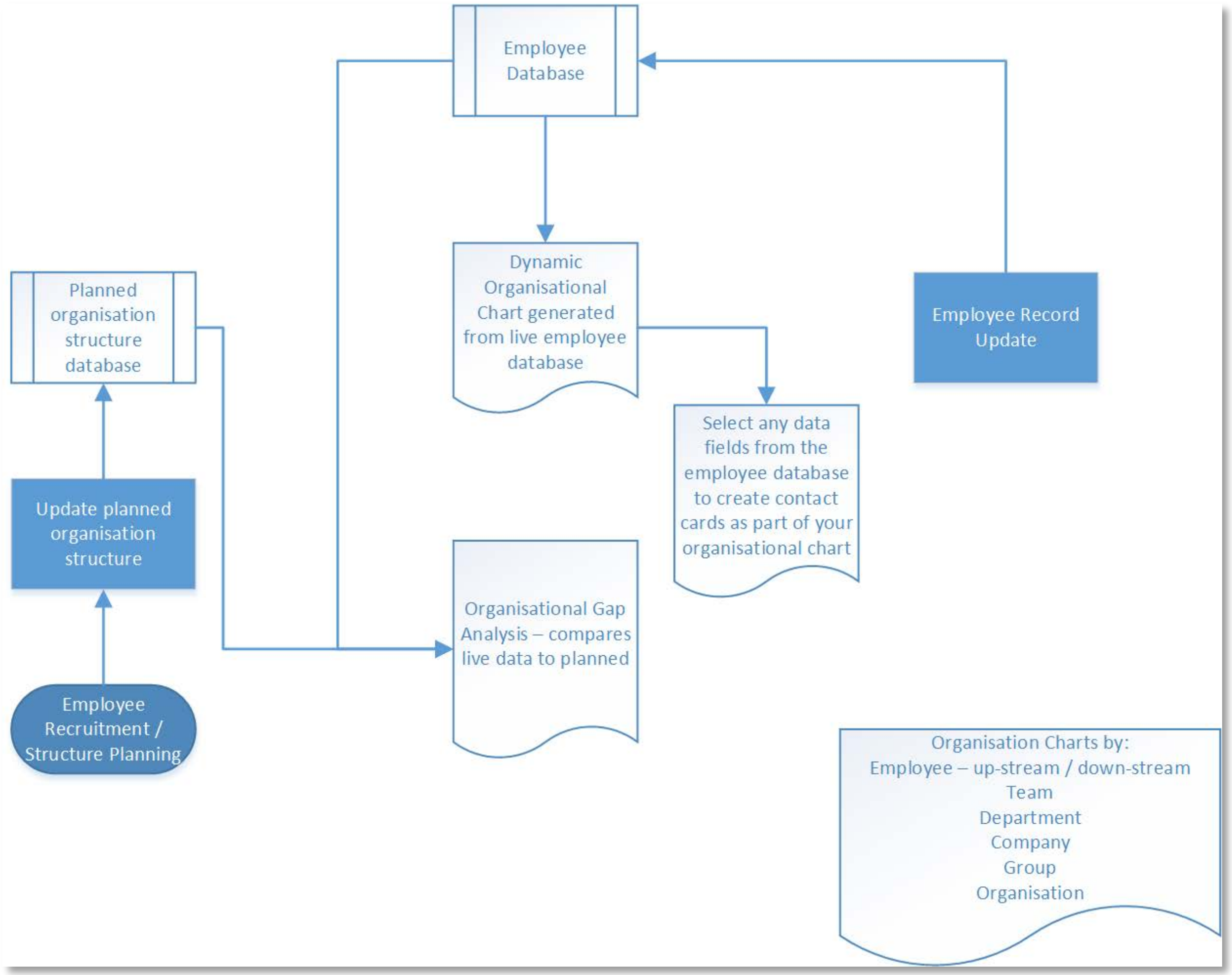

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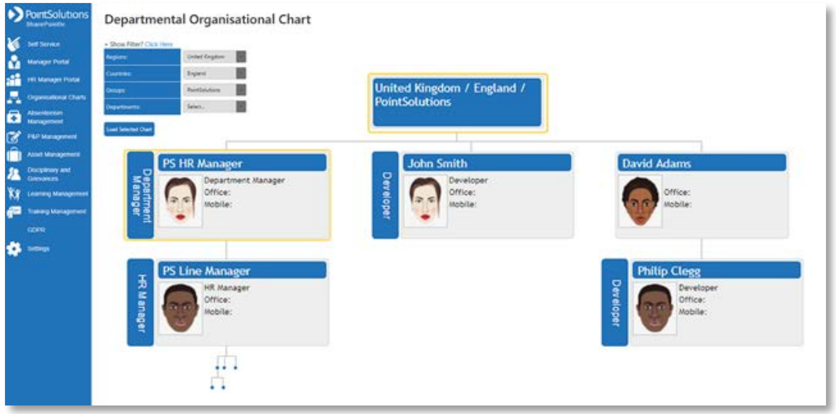
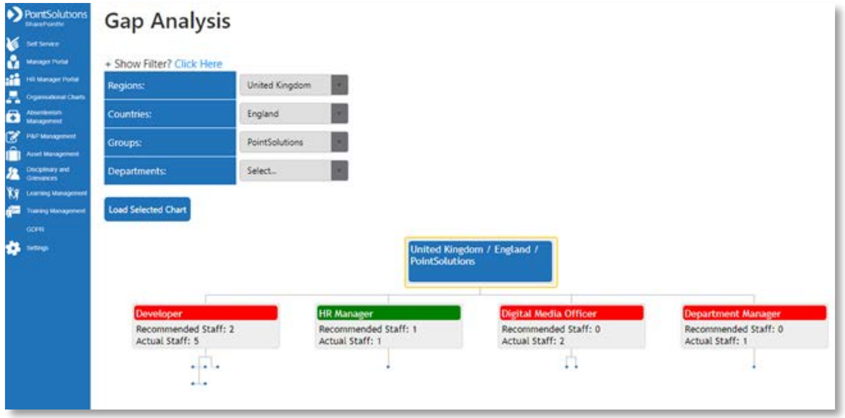
Organisational Charting



Users are able to view the Organisational Chart to view people they manage as well as their own Line Managers.



The Gaps Analysis Chart depicts gaps in the requirements of the organisation.

Holiday Management

PeoplePoint 365 Holiday Management provides self-service holiday booking and status process for Employees and Management authorisations and status overviews.

Holiday entitlement records are specific to an Employee and can account for service related increments year-on-year. Holiday years can be defined as organisational, calendar or specific to an individual (i.e. start date, birthday).

The approval process auto-updates the holiday entitlement and employees can view the status at any time. Their total entitlement can comprise of contractual entitlement, TOIL (Time Off In Lieu) updates, carried forward and holiday purchases.

Holiday time can be booked in hours or ½-days and this can be set specific to an individual. All requests and authorisations send out notifications and authorisers are allocated tasks to process the request. Changes to booked holidays can be processed and records don't have to be deleted and re-submitted – all change request go back through the approval process.

A holiday calendar is auto-generated based on the holiday records and can be viewed at Employee, Team, Department, Regional and Company levels. Entries are colour-coded to define requested, authorised, company and statutory holidays.

Contractual working times templates (linked to employees) define when an Employee works, allowing auto-calculation of literal holiday time between the dates requested (this can be manually overridden to account for complex scenarios that cannot be defined and/or where Management discretion needs to be applied).

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Holiday Management

- Holiday management within PeoplePoint 365 is able to facilitate the self-service booking of holidays for employees at all levels in the organisation.
- Management authorisations and status overviews are provided to employees at a management level within the business.
- Holiday entitlement records are specific to an employee record meaning that employees can be given increments based on performance, length of employment etc.
- The system can refer to holidays in separate categories (i.e. Company wide, personal, bank holidays). Only personal holidays will effect entitlement within the employee record unless the employee is stated as usually working bank holidays.
- The authorisation process automatically updates holiday entitlements against the holiday type taken and gives notification to employees that the holiday is authorised. Employees can also view the status of the request at any time.
- Holidays can be booked in various ways (i.e. Days, half days or hours etc.).
- Requests and authorisations can send out notifications to stakeholders.
- The system will generate a holiday calendar pulling information from the holiday records, with the ability to view at various contextual levels.
- Holidays can be amended or cancelled by the employee prior to the holiday starting with amendments requiring authorisation. Beyond the start this control has to fall to the defined management level.
- Control can be put in place to ensure an employee doesn't make a request which exceeds their remaining holiday time in a single request.

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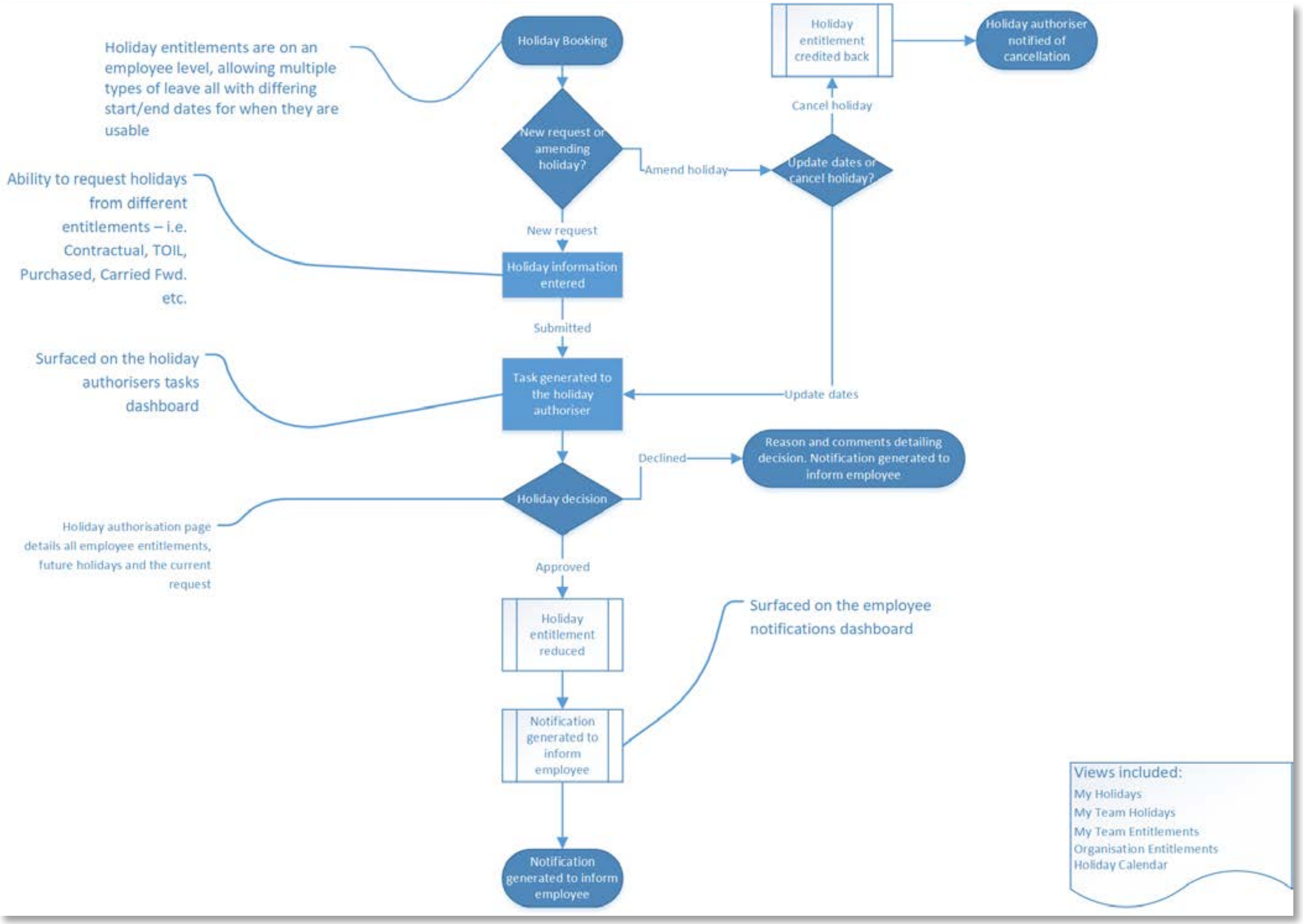
PeoplePoint 365
Modules

Holiday Management

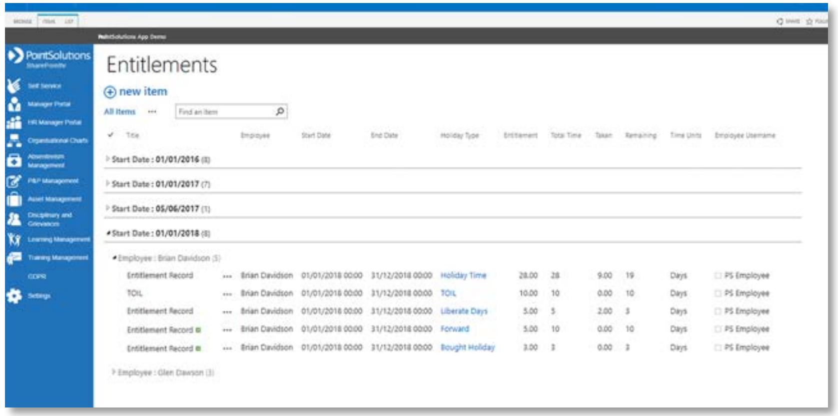


Employee Record Management
Employee Record Manager
Employee Document Manager
Employee On-Boarding
Employee Change Management
Employee Off-Boarding
Organisational Charting
Holiday Management
Absenteeism Management
Policy & Procedure Management
Timesheet Management
More Modules

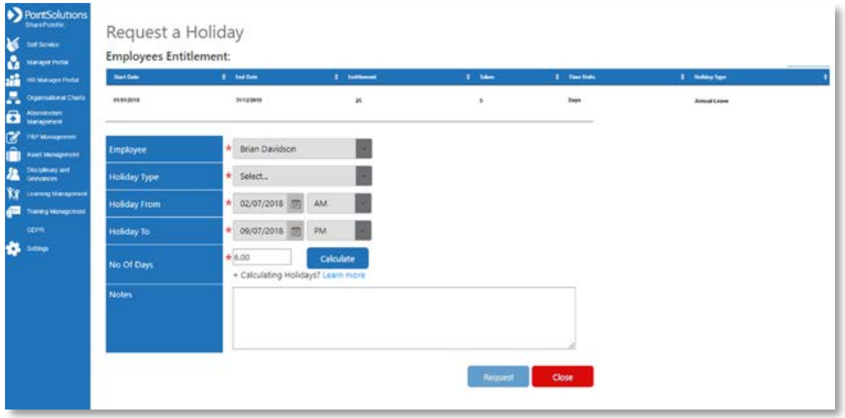
PeoplePoint 365
Modules

More Modules

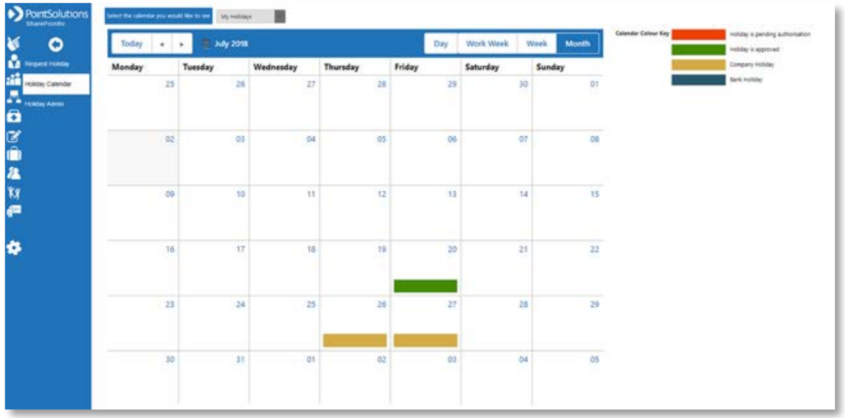
Holiday Management



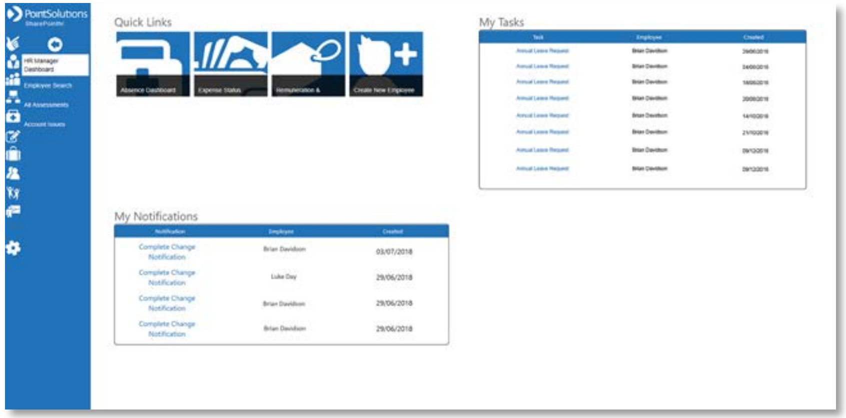
Employees can view their Entitlements through the Entitlements dashboard.



The self-service function of PeoplePoint365 enables users to request their own holidays.



Users are able to view their own and team member's holiday statuses in the holiday calendar.



The self-service Employee dashboard facilitates holiday requests, expense requests, Notifications, and Tasks.

Absenteeism Management

All leave, apart from contractual holiday entitlement, is managed through the Absenteeism Module – this module accommodates both planned and unplanned leave.

Employees can request planned leave (i.e. Hospital appointment, training etc.) that invokes an authorisation process, whilst unplanned leave records can be created by line and/or HR managers.

Leave classification is contextual, from 2 perspectives – i) Type, category and sub-category are relational (i.e. categories listed are relation to the Type of leave and sub category to category) and; ii) the field presented for completion are directly relation to the Type and Category selected (i.e. sick leave will request self-cert and doctors notes, where planned training leave will not).

Leave processes include the ability to record start and end dates, self-certification completion requirement, doctors notes requirement, return to work interview details and whether leave is paid or unpaid.

Management Dashboards surface the current leave status and highlight overdue elements (i.e. self-certs, doctors notes, return to work interviews etc.). Also leave calendars can be viewed – independently or combined with contractual holiday leave.

In additional to the standard report features such as Bradford Factor, department absent days, cost of absenteeism (organisation, company, region, department, line manager, employee) etc., PeoplePoint 365 includes its own absenteeism policy matrix. This allows polices to be defined that alert when breached and they can be literal days absent, number of instances and/or ratio of contracted working time to actual working time. These can be set individually or as a combination. This facilitates the assignment of policy dependent of Employee status (i.e. probation, full-time/part-time, xx years service etc.).

It also allows for rules to be applied for number of paid days for absenteeism that once exceeded notify all relevant parties (employee, line manager, payroll etc.)

PeoplePoint 365
Modules

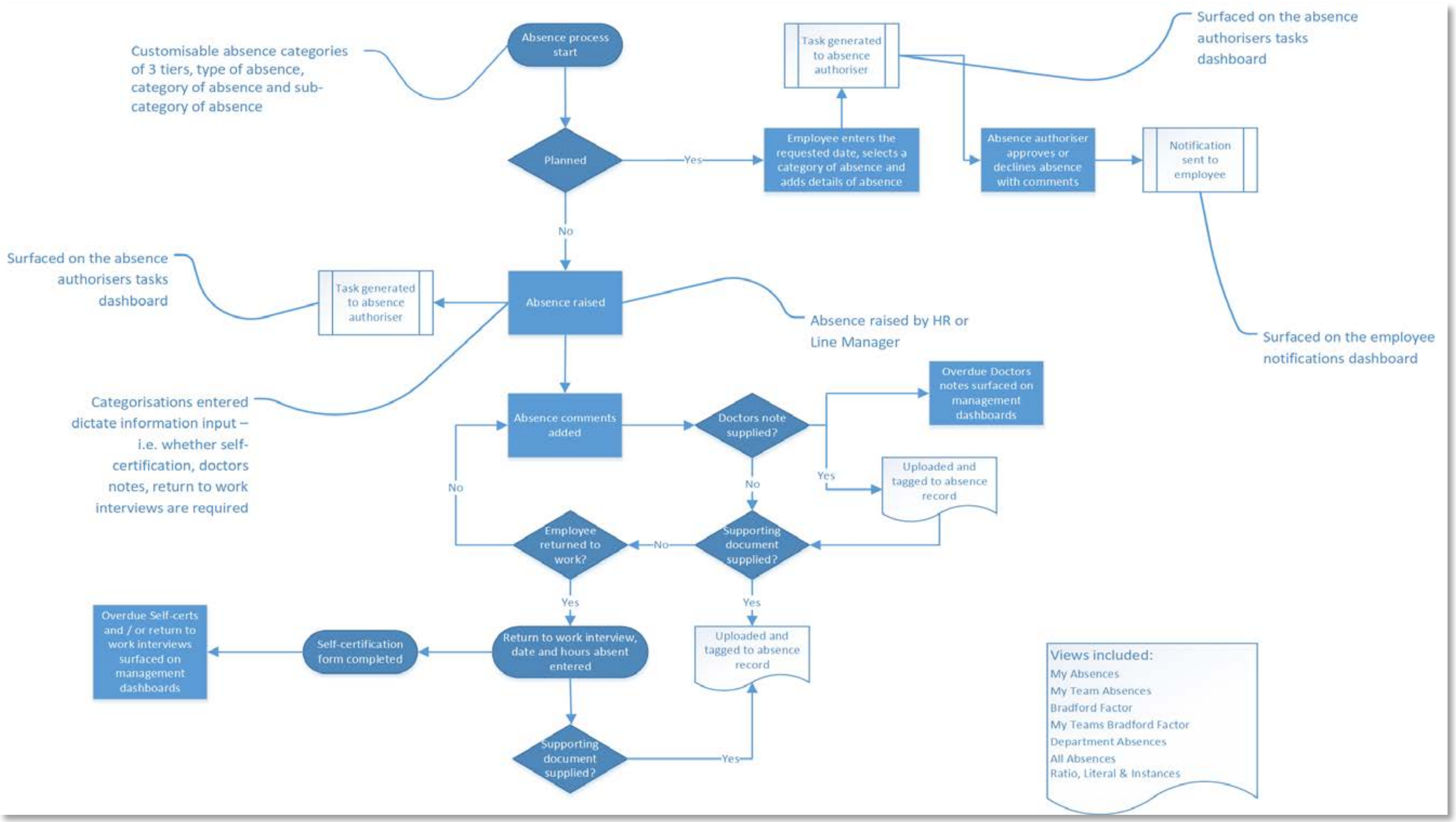
Absenteeism Management

- All leave within the organisation that is not inline with holidays will be managed under absenteeism.
- In relation to absence employees have the ability to raise planned absence but the management process also facilitates unplanned absences (i.e. sickness).
- Planned leave requests will trigger an authorisation process for the relevant stakeholder.
- Unplanned absence records can be created by HR or the employees line manager.
- The process has the ability (but is not limited) to record a start and end date, attach doctors notes, indicate whether leave is paid or unpaid and record return to work dates.
- Management dashboards can surface the absence status of all the employees with context to who is viewing the page.
- The management dashboard will highlight any overdue tasks for example an employee providing an up-to-date doctors note.
- Leave calendars can be viewed specifically or in line with the holiday calendars.
- PeoplePoint 365 contains the ability to set a absence policies meaning they can define how many absence days an employee can have. These policies can be reported on or trigger a notification to the relevant stakeholder.
- Reporting for Bradford Factor and ratio analysis over a given period of time is available, with indicators (based on company acceptance levels) are built into the report to highlight visually where measures are becoming, or have become, unacceptable.

PeoplePoint 365
Modules

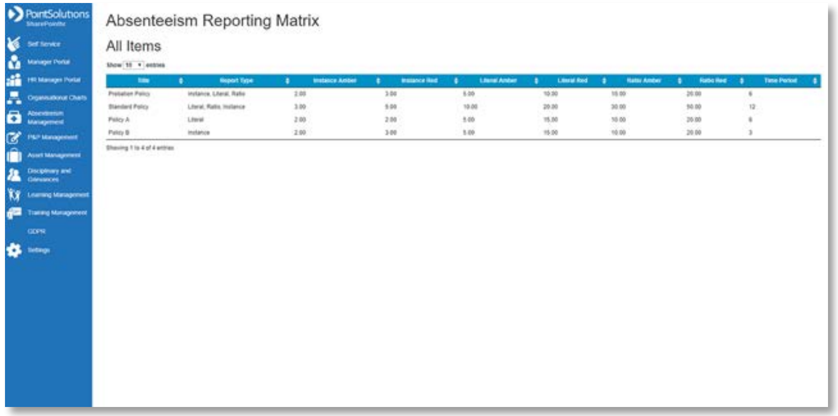
More Modules

Absenteeism Management

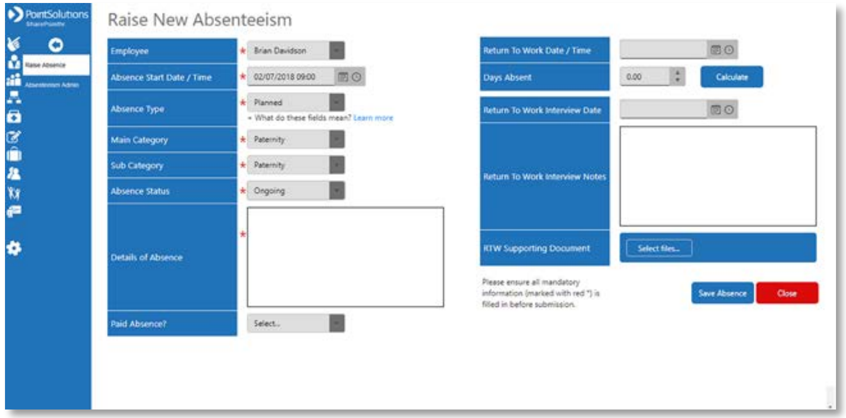


PeoplePoint 365 Modules

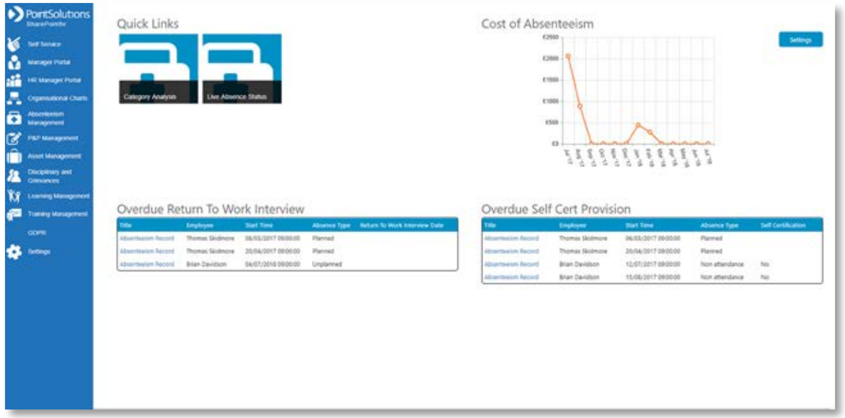
Absenteeism Management



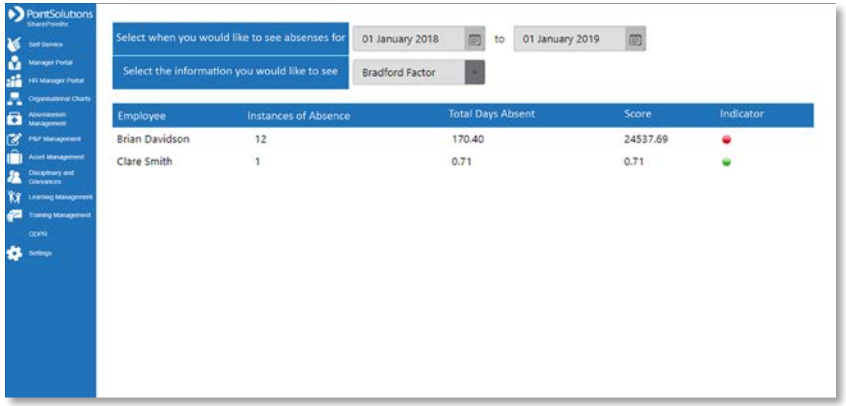
The Absenteeism Reporting Matrix surfaces records of all instances of absenteeism.



New Absences are raised through the above form either upon the return of the employee or at the start of the absence.



Line Managers can access an overview of absenteeism records through the Absenteeism Dashboard.



PeoplePoint 365 provides an overview of the Bradford Factor in relation to all employees with absences.

Policies and Procedures Management

PeoplePoint 365 aids policy compliance and delivers an efficient policy sign-up process. It works by cataloguing all organisational policies, defining policy category, owner, revision review date, relevance etc. With respect to the relevance, this allows policies to be mapped to Employees such that they are only requested to sign-up to policies relevant to their role – these may include organisation wide policies, departmental, location, job role-based policies etc.

Allocation of policies can be triggered in a number of ways:

- As part of onboarding an employee
- The introduction of a new policies affecting existing employees (i.e. GDPR)
- Revision of an existing policy that requires re-issuing and re-signing

The signing of policies by Employees updates an Audit Log and status of all assigned policies is escalated on management dashboards (i.e. overdue policies, overdue policies relevant to GDPR etc.).

The process to re-issue a revision of existing policies delivers real efficiency and compliance value. Standard SharePoint Document Management facilitates the review, update and approval process for policy update, and once signed-off, the associated catalogue record is updated to indicate a new version and this re-issues to all relevant employees. This creates a sign-up Audit Trail through all versions

Employees are alerted to the creation of a new or revised policy and requested to sign-up within a defined time period.

PeoplePoint 365

Modules

More Modules

Policies and Procedures Management

- Aids policy compliance.
- Delivers efficient policy sign-up processes.
- Catalogues all organisational policies; defines policy category, owner, revision, relevance, etc.
- Policies can be mapped to employees which ensures employees only sign up to relevant policies.
- Multiple trigger points for policy allocation: on-boarding, introduction of new policies that affect existing policies, revision of existing policies, etc.
- Provides a full audit log and status of all assigned policies, through all versions.
- Overdue policies escalated to management dashboards.
- Enabled GDPR related policies to be indicated with reporting on employees who have not signed up to a GDPR policy.
- SharePoint document management facilitates policy document management with abilities to trigger reviews, updates and approval processes.
- Employees are alerted to new and revised policies automatically with a task to sign-up to the policy.

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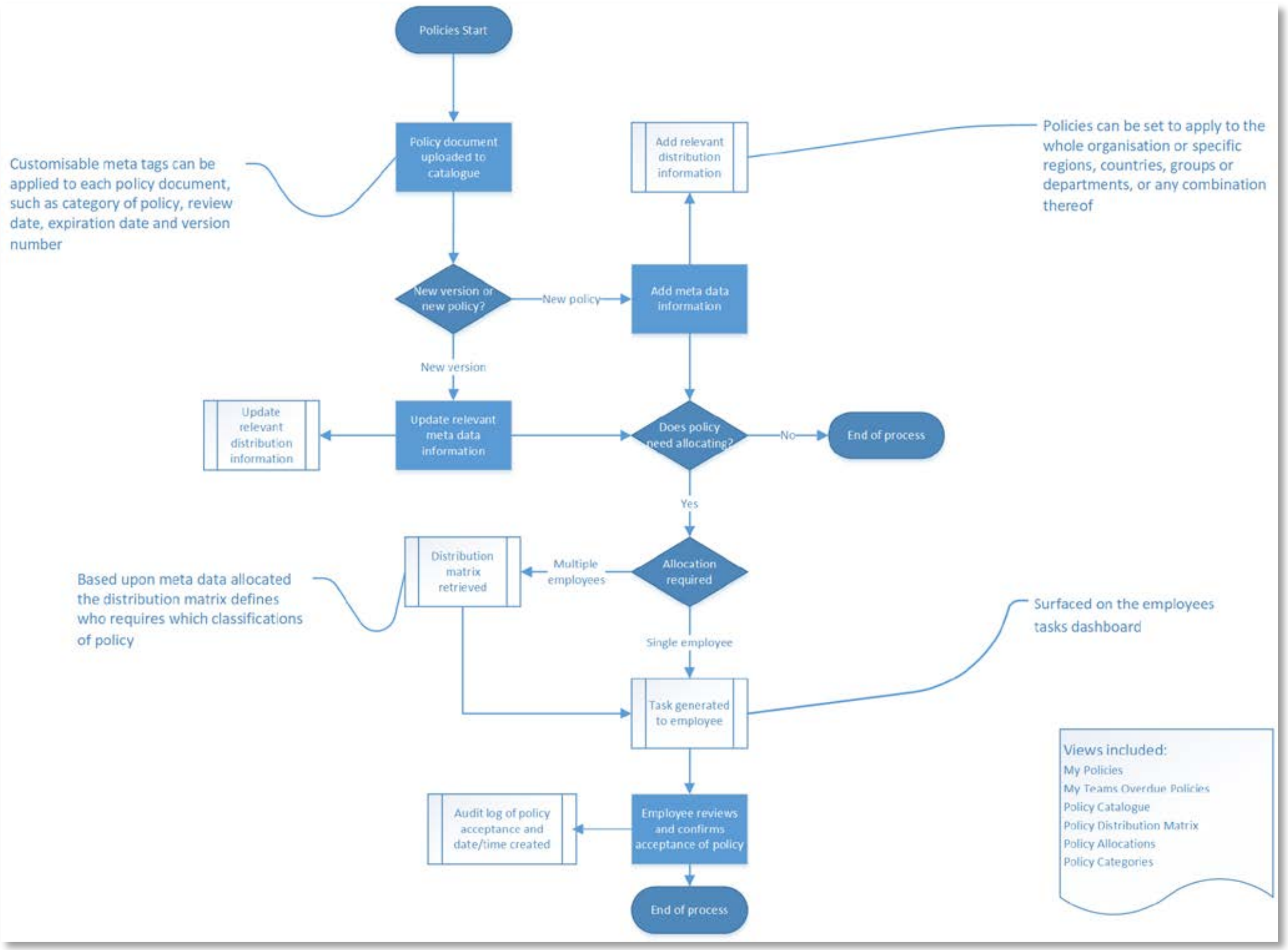
PeoplePoint 365
Modules

Policies and Procedures Management



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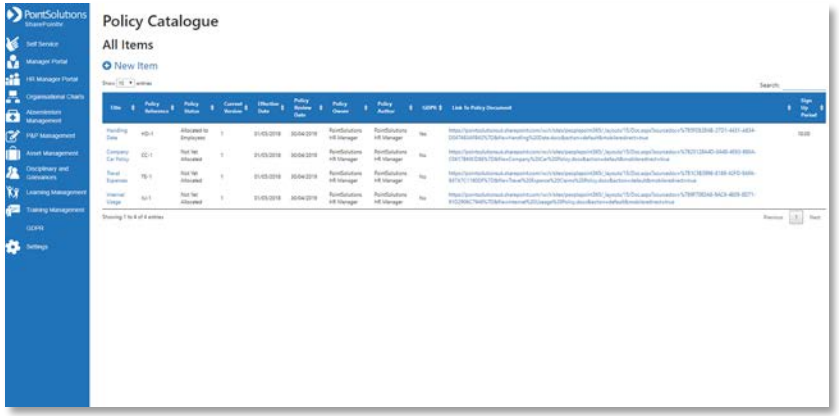
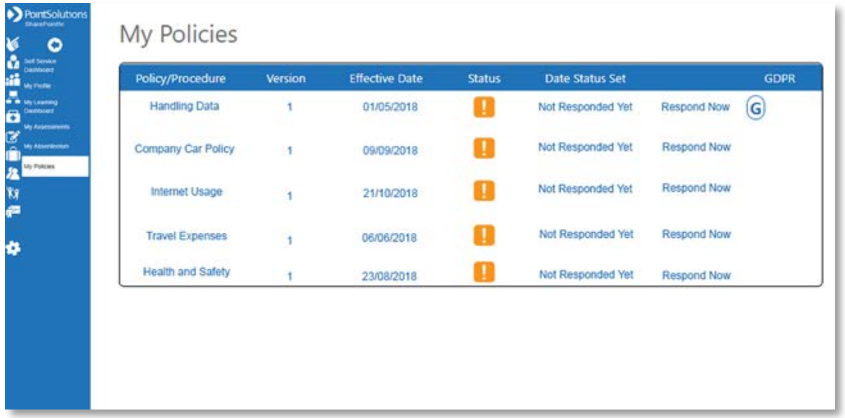
Modules

More Modules

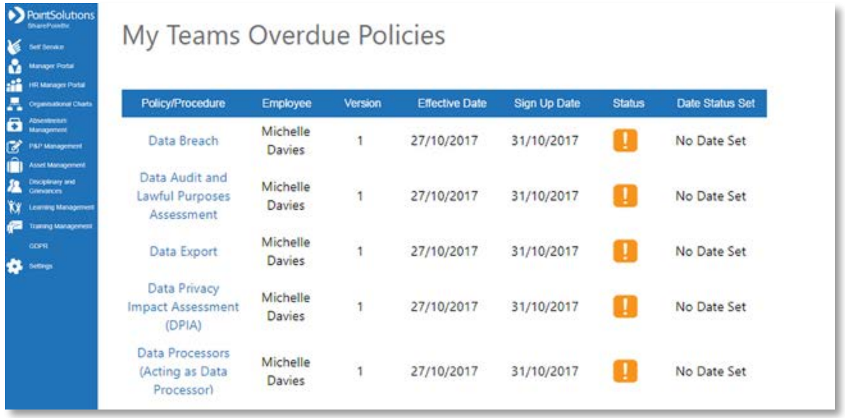
Policies and Procedures Management



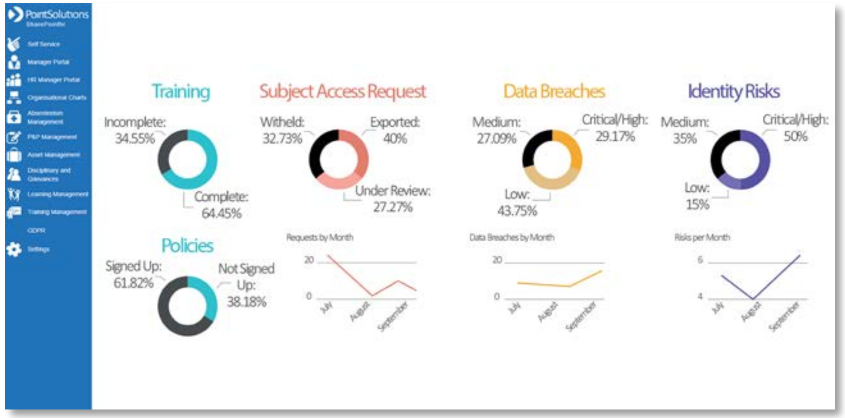
The Policy Catalogue holds a record of all policies within the Application and provides a link to supporting documents.



The ‘My Policies’ table is surfaced for Employees to be notified of policies that require actions.



The ‘My Teams Overdue Policies’ table is surfaced for Line Managers to have an overview of their team’s policy statuses.



Management have a full overview of GDPR KPIs – accessed on a contextual level and can be viewed by section.

Timesheet Management

The Timesheet Module in PeoplePoint 365 facilitates the retrospective recording of time within a working day. The time recorded can be assigned to:

- Clients
- Projects
- Jobs

The type of work undertaken can also be defined to:

- Project management
- Support
- Consultancy
- Service desk

Timesheets can be updated daily and submitted weekly. The submission process invokes an authorisation route for sign-off. Holidays and Absenteeism recorded in the Application can be auto-added to the timesheet, removing re-keying.

Whilst the Timesheets module is not designed to be a clock-in/clock-out system or a rota management system, it can be configured to import data from such systems to trigger extended classification input, review and sign-off processes. The Timesheets module also caters for the logging (and authorisation) of overtime, which can be output in a number of ways, i.e. it can update the TOIL (Time Off In Lieu) bank in the holiday module or it can output a report for payroll to pay overtime.

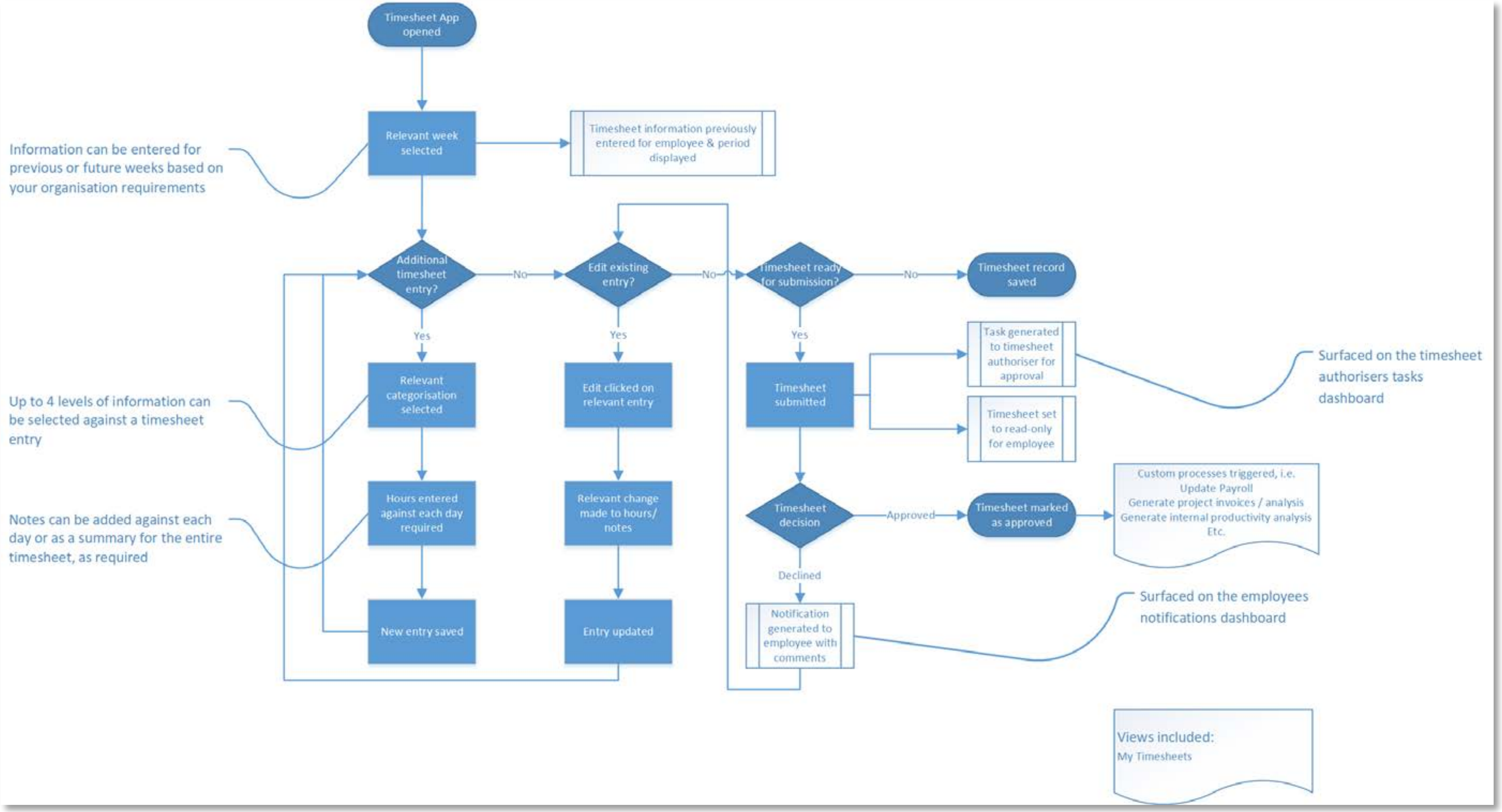
Integration into Payroll can be configured to facilitate employee salary and/or overtime payments from timesheet data, however this is totally reliant on the payroll system and the integration schema's provided. Other outputs from the timesheet module, include analysis by client, project, job, type of work and employee (and by association, role, department etc.). If cost and sell rates of pay are recorded against employees then financial analysis can also be produced – in addition to literal hours.

Timesheet Management

- Timesheet module facilitates retrospective recording of time worked.
- Each day, and each overall week, can have notes added to each detail of time to allow justification or comment against the time recorded.
- Time recorded can be assigned to type of work, clients, projects, jobs, etc. enabling analysis at each respective level
- Time can be assigned to a category, i.e. project work, overtime etc. enabling analysis and reporting based on each category
- Timesheets can be updated daily and submitted weekly.
- Holidays and absenteeism can be auto-added to the timesheet.
- Module can be configured to import data from clock-in/out and rota management systems to trigger extended classification input.
- Ability to log and authorise overtime through Time Off In Lieu (TOIL), or output a report for payroll to pay overtime.
- Facilitates payroll integration, depending on system.
- Submitted timesheets are passed to the line manager for approval, if approval is not given this can be passed back to the employee to update and re-submit for approval.

PeoplePoint 365
Modules

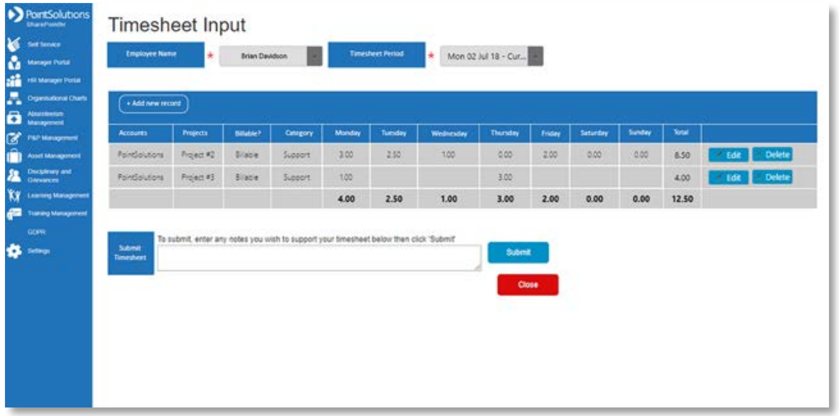
Timesheet Management



PeoplePoint 365
Modules

Employee Record Management
Employee Record Manager
Employee Document Manager
Employee On-Boarding
Employee Change Management
Employee Off-Boarding
Organisational Charting
Holiday Management
Absenteeism Management
Policy & Procedure Management
Timesheet Management
More Modules

Timesheet Management



Users have the ability to log and submit timesheets digitally and assign time to individual projects.

PeoplePoint 365 provides the ability to access overviews of timesheet submissions.

Employee Appraisals

PeoplePoint 365 provides an objective-based appraisal management module, designed for either informal (text-based) or formal (scoring-based) assessment. Objectives can also be aligned to business goals to deliver appraisal analysis insight relating to the goals the objectives are designed to achieve.

Objective templates can be created at organisational (i.e. apply to everyone) company, department, role and project levels. The templates can be auto-assigned to employees that match the criteria. Thereafter individual objectives can be assigned (if required) that add to the defaults. The context being that organisational and departmental managers agree their objectives and appraiser assigns and obtains sign-off from employees at the start of the appraisal year.

The appraisal process can incorporate 1-to-4 appraisals per year with any number of supporting 1-2-1's. There is also the ability to request 360 feedback to contribute to an employee's appraisal and support documents can be attached to the record for review and/or evidence purposes.

In addition to objectives being assigned, organisational values can be logged to enable both the appraiser and appraisee to comment on how they feel they represent the values.

If objective scoring is the preferred option, a scale can be assigned and weighting can be applied to each objective, such that the output scores reflect the importance of each specific objective in relation to the overall objectives. The scoring allows the production of reports and rankings based on specific objectives, related business goals, types of objectives (i.e. sales, service, production etc.) – in additional to filtering by organisational structure (company, group, department, job role etc.).

For each appraisal both the appraiser and appraisee have the ability to add comments and rate the performance against each objective. The employee has the ability to document what help (if any) they require and the appraiser has the ability to record the output actions. The actions can be in the form of comments against the appraisal record and/or specific tasks can be created that surface on an individuals task board to provide focus.

Employee Appraisals

- PeoplePoint365 provides the user with an objective focused appraisal module.
- The objectives templates are created by a stakeholder and can be allocated at various organisational levels.
- Objective templates are assigned a criteria based on organisational structure or job role in preparation for allocation. This makes generating an appraisal quick and effective.
- Additional objectives can be added to an appraisal (in addition to the template objectives) to allow for additional growth within the appraisal year
- Appraisal objectives are weighted to enable key or larger objectives to carry more weight / precedence within the appraisal
- Allows for up to four formal appraisal reviews within an appraisal a year and an unlimited number of supporting 1-2-1.
- Feedback requests can be made to colleagues from the appraisal system using the 360 feedback facility.
- The appraisal forms can facilitate supporting documents being uploaded and stored against the appraisal.
- In addition to the signing off of objectives the forms can also hold values allowing for an stakeholders to make comments on the form for various contextual reasons.
- Appraisals have the ability to record (by way of a score) how the employee meets company values (i.e. trustworthiness, honesty etc.).

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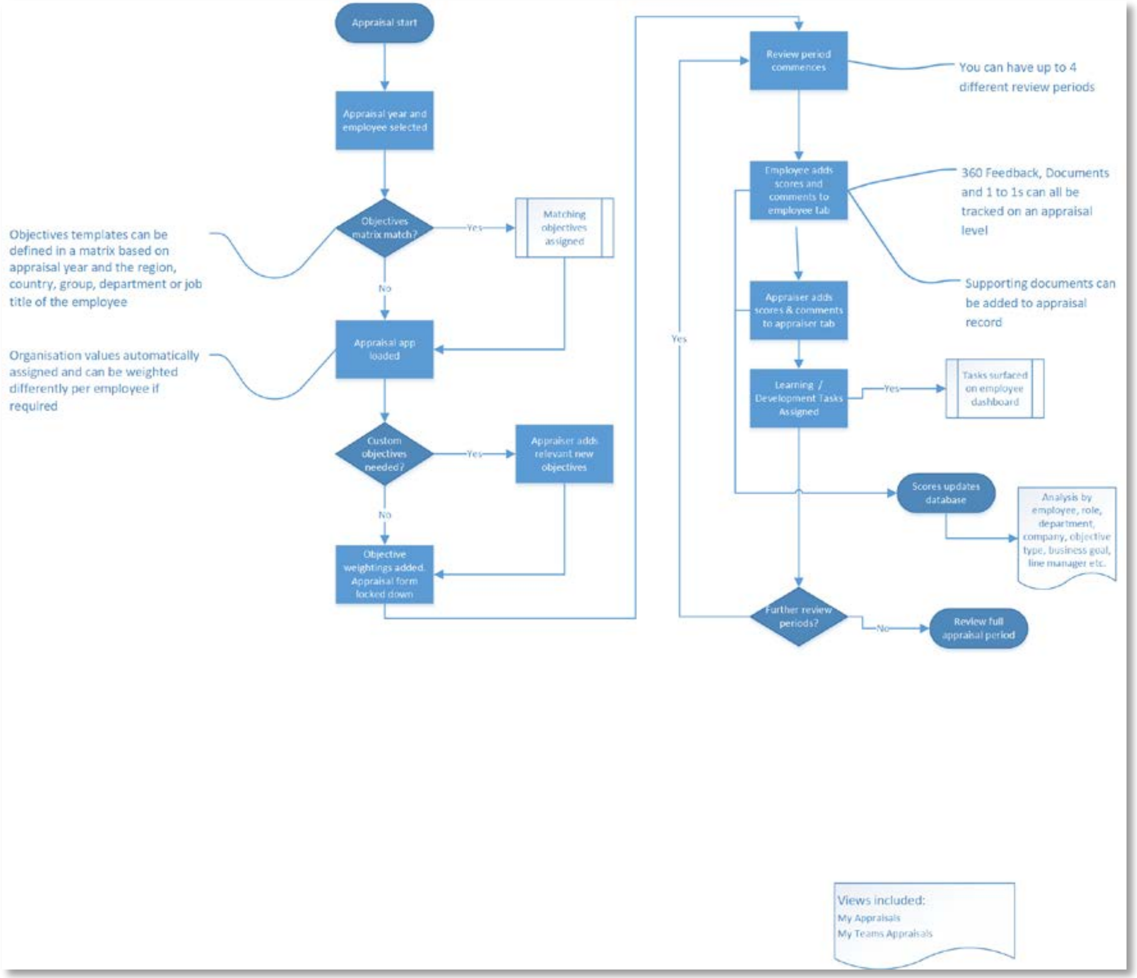
Employee Appraisals



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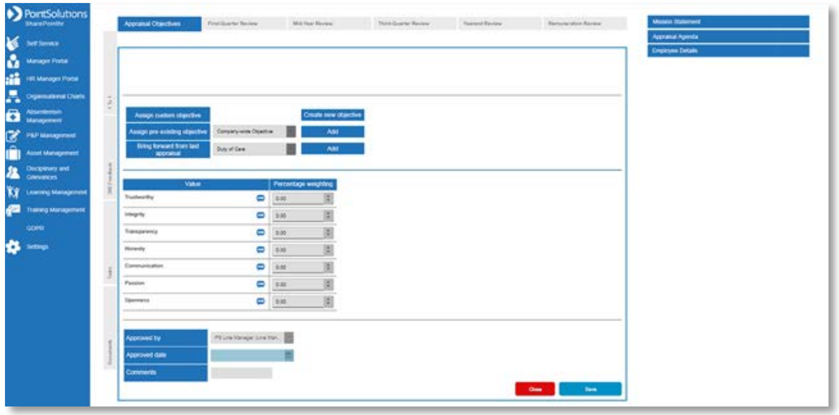
Employee Appraisals



HR and Line Managers access appraisal forms, which are tagged to Employees upon completion.

PeoplePoint 365 integrates with PowerBi for powerful, real-time reporting and analytics.

Remuneration and Benefits

PeoplePoint R&B provides the ability to itemise an Employee's individual Remuneration and Benefits assets that are allocated as part of their contract. This log auto-generates their Remuneration and Benefits statement from real-time data and provides annual progression analysis.

Full Audit Trail

To facilitate the year-on-year comparison changes to individual Remuneration and Benefits statements, items automatically create specific records that are data stamped, ensuring a full audit trail for the lifetime of employment.

Change Request Process

There is a change request process linked to the Module that allows a request (from whoever is assigned access – i.e. an Employee's Line Manager) and authorisation process for Remuneration and Benefits updates. The authorisation process includes the ability to apply an effective date, so changes can be reviewed in advance.

In addition to individual R&B statements for Employees, the Organisation has the ability to value each type of Remuneration and Benefits asset as part of the organisational structure (i.e. company, region, group, department).

Remuneration and Benefits

- Ability to itemise employees individual remuneration elements and benefits.
- Audit log auto-generates remuneration and benefit statement from real-time data.
- Annual progression analysis.
- Year-on-year comparison changes automatically created for specific records.
- Change request process linked to the module to save dual entry on salary changes.
- Authorisation process for the creation and/or amending of remuneration and benefits.
- Future planned release of benefits can be recorded in the system with effective dates to reflect the actual start of the remuneration and/or benefit change.
- Ability to value to each type of remuneration and benefit offered by the company asset as part of the organisational structure.
- Clarity / transparency can be given to employees by surfacing remuneration and benefits information in employee record.
- Addition of remuneration and/or benefit can be result of a process followed which is triggered by the appraisals module.

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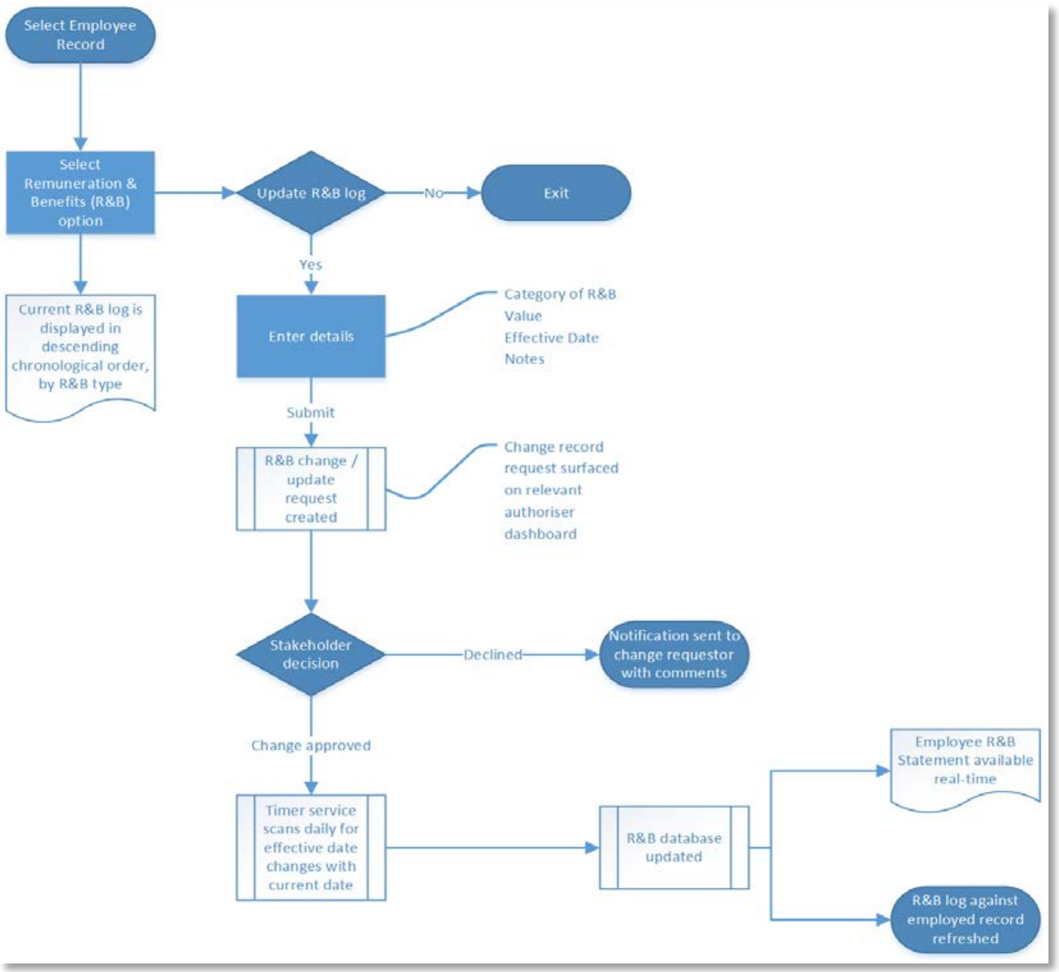
Remuneration and Benefits



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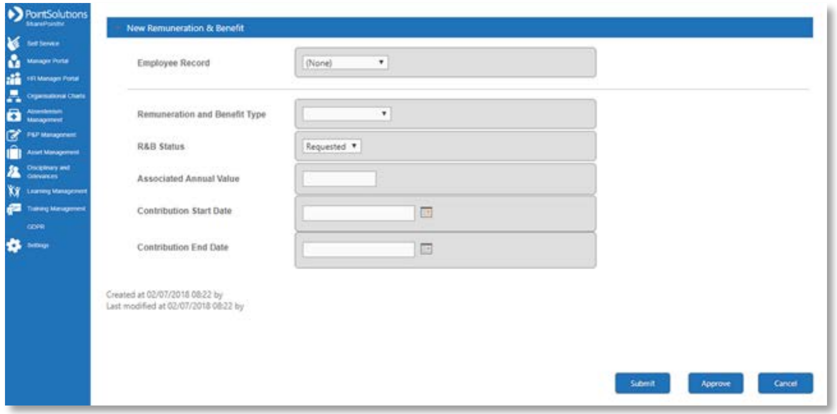
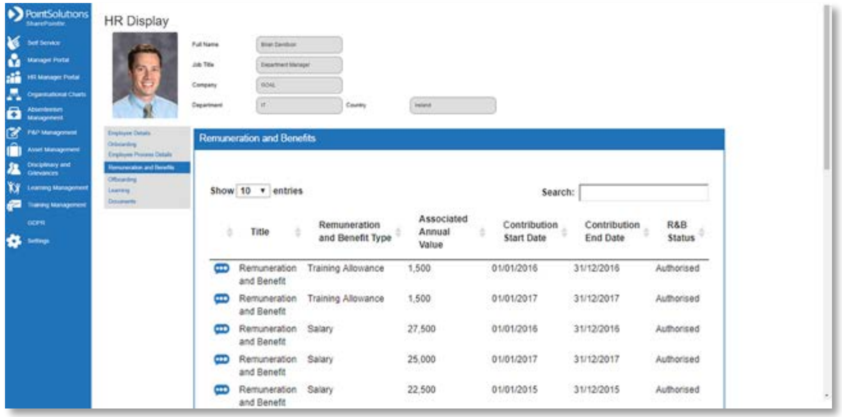
Remuneration and Benefits



The Remuneration and Benefits form allows users with appropriate permissions to add benefits to Employee Records.



The Remuneration and Benefits tab within the Employee record surfaces all benefits assigned to an Employee.

Employee Asset Management

As part of the induction, ongoing management and off-boarding of Employees, PeoplePoint 365 has the ability to assign assets to employees and book assets back into 'stock'. The module is designed to provide an audit of Employee assets, when they were assigned to an Employee, and when they were returned.

An 'asset bank' is kept up-to-date each time an asset is purchased and disposed off. This could include:

- Laptops
- Phones
- Keys
- Fobs

Each asset is recorded with serial numbers, date of purchase, warranty information etc.

The asset bank could be extended to accommodate pool cars, BYOD (Bring Your Own Device), PPE (Personal Protective Equipment) etc. where allocation and use of assets changes frequently and needs to be audited.

An allocation and return process creates individual records and facilitates the logging of asset status, providing real-time audit as to who has possession of what asset at what time.

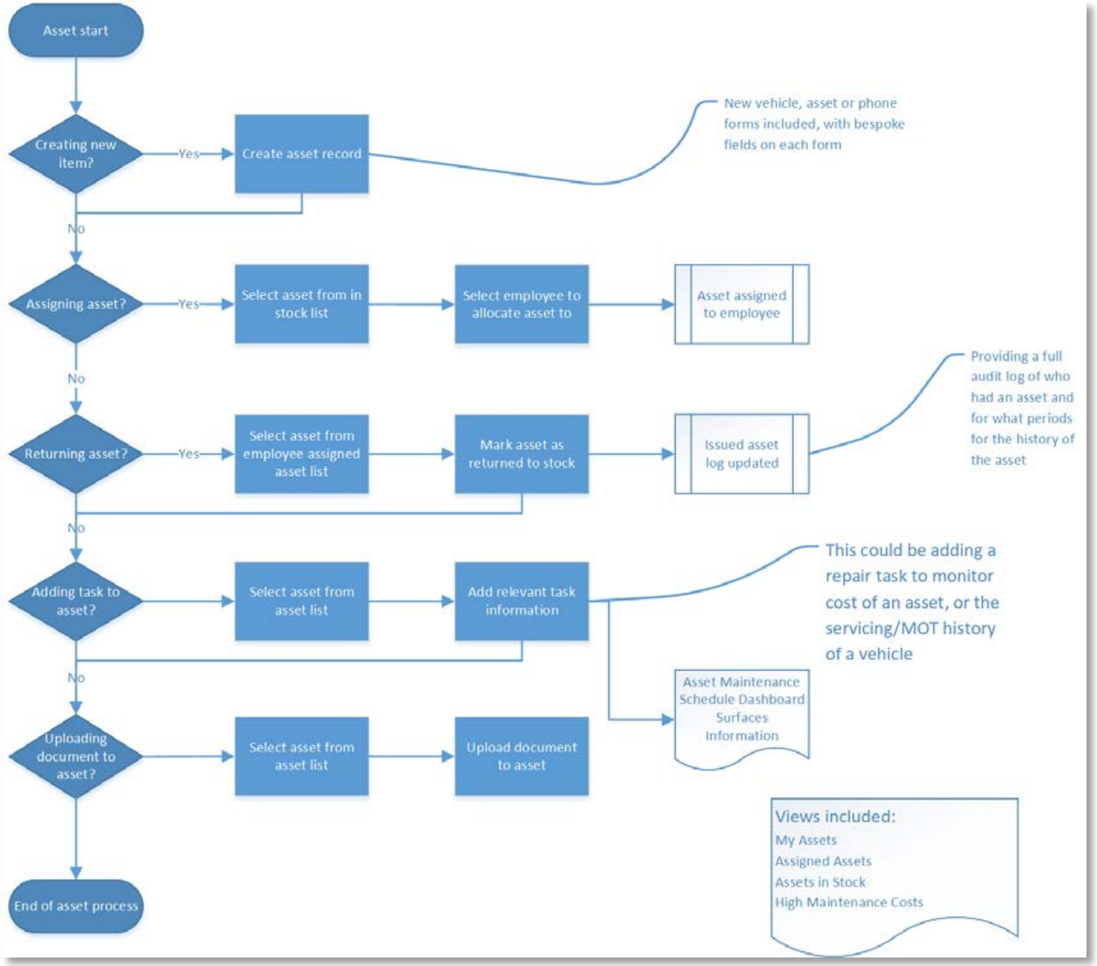
A maintenance feature has also been included, such that each time the asset needs any form of maintenance this can be logged and tracked. This could be in the context of value for cost of repair – to assess if the asset ongoing value vs. cost needs reviewing and/or in the from a scheduling perspective – i.e. vehicle service and MOT's, vehicle inspections, asset warranty expiry dates etc.

Back

Employee Asset Management

- Control and itemise assets of the business from a centralised asset bank (catalogue).
- Ability to assign assets to employees and book them back in to the ‘bank’ or 'stock' when returned.
- Provides full audit log of employee assets: when assigned and when returned.
- Asset bank can include laptops, phones, keys, etc. and be extended to pool cars, Bring Your Own Device (BYOD) and Personal Protective Equipment (PPE).
- Real-time audit logs.
- Asset fault and maintenance recording included as part of the audit log.
- Ability to record the value of assets which can be output into a report as a whole or by type of asset.
- Reporting on asset value vs asset cost (i.e. cost of maintenance) can be achieved from information in the system.
- Employee can see all their currently allocated assets in their employee record, if required.
- Asset allocation lists can be used during off-boarding where reports will show assets an employee holds that they require to return before they leave.

Employee Asset Management



PeoplePoint 365

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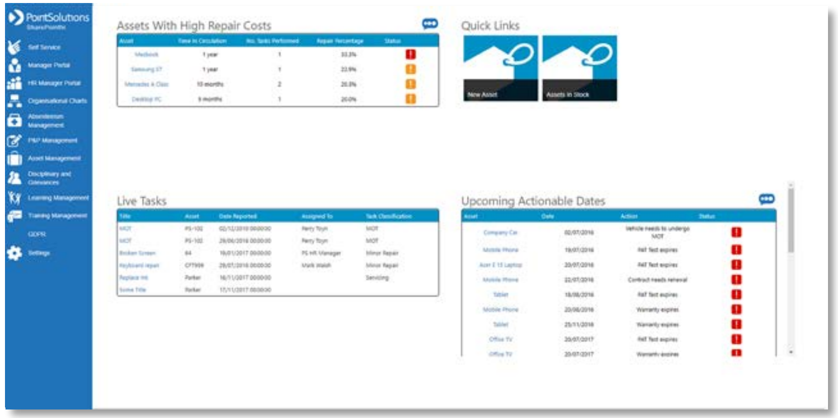
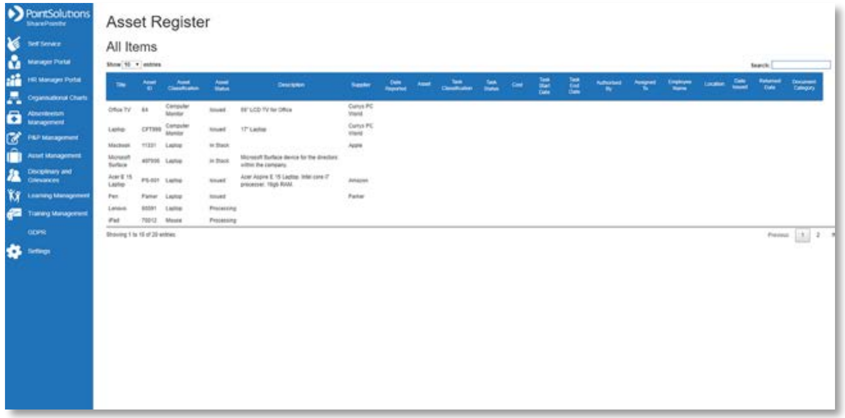
Employee Appraisals
Renumeration & Benefits
Employee Asset Management
Disciplinary & Grievance
Expenses Management
GDPR
Dashboards
Management Reporting
Permissions and Security
Notifications
Skills & Competencies

Employee Asset Management



The Asset Dashboard is a central source of information which surfaces details of actionable dates around assets.



The Asset Register records all assets and provides an overview of all information relating to an asset.

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Disciplinary and Grievance

PeoplePoint 365 Disciplinary and Grievance module provides a fully auditable disciplinary process that commences with specified individuals being able to create a disciplinary record.

Structured Process

A structured process dictates that an investigation has to be logged, concluding with a status, description and reasons being allocated. Should the matter require progression to a formal Disciplinary, this invokes the Disciplinary Hearing Section, allowing scheduling and recording (attendees, dates, summary, outcomes etc.) of information. Further steps can be invoked – i.e. a second hearing and/or appeals, all of which are recording within the system. Throughout the process supporting documentation can be attached to the disciplinary record.

Security

In respect to Security, access to Disciplinary and Grievance Records is defined within the forms themselves to ensure only specified people have access.

The Grievance process is similar to Disciplinary in respect to investigations, hearings and appeals (with all relevant information) are logged as part of the process.

Employees can invoke a Grievance and have the ability to select to who the Grievance should be escalated, ensuring all information is kept confidential.

The system reports of Disciplinary and Grievances based on type and classification, within the organisational structure (i.e. Company, Group, Department, Line Manager, Employee).

Disciplinary and Grievance

- Fully auditable disciplinary and grievance process.
- Only specified individuals able to create a disciplinary record.
- Structured process for disciplinary and grievances: log, review / investigate, appeal management, outcome.
- Facilitates ability to progress to disciplinary hearing.
- Further processes can be invoked: second hearing, appeals, etc.
- Security only allows specified individuals access to each record.
- Grievances follow similar procedure to disciplinaries.
- Employees can invoke grievances.
- Disciplinary and grievances are based on classification within the organisational structure.
- Documents can be automatically generated based on templates for invitations to meetings, outcomes of meetings and outcomes of the entire process.

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Modules

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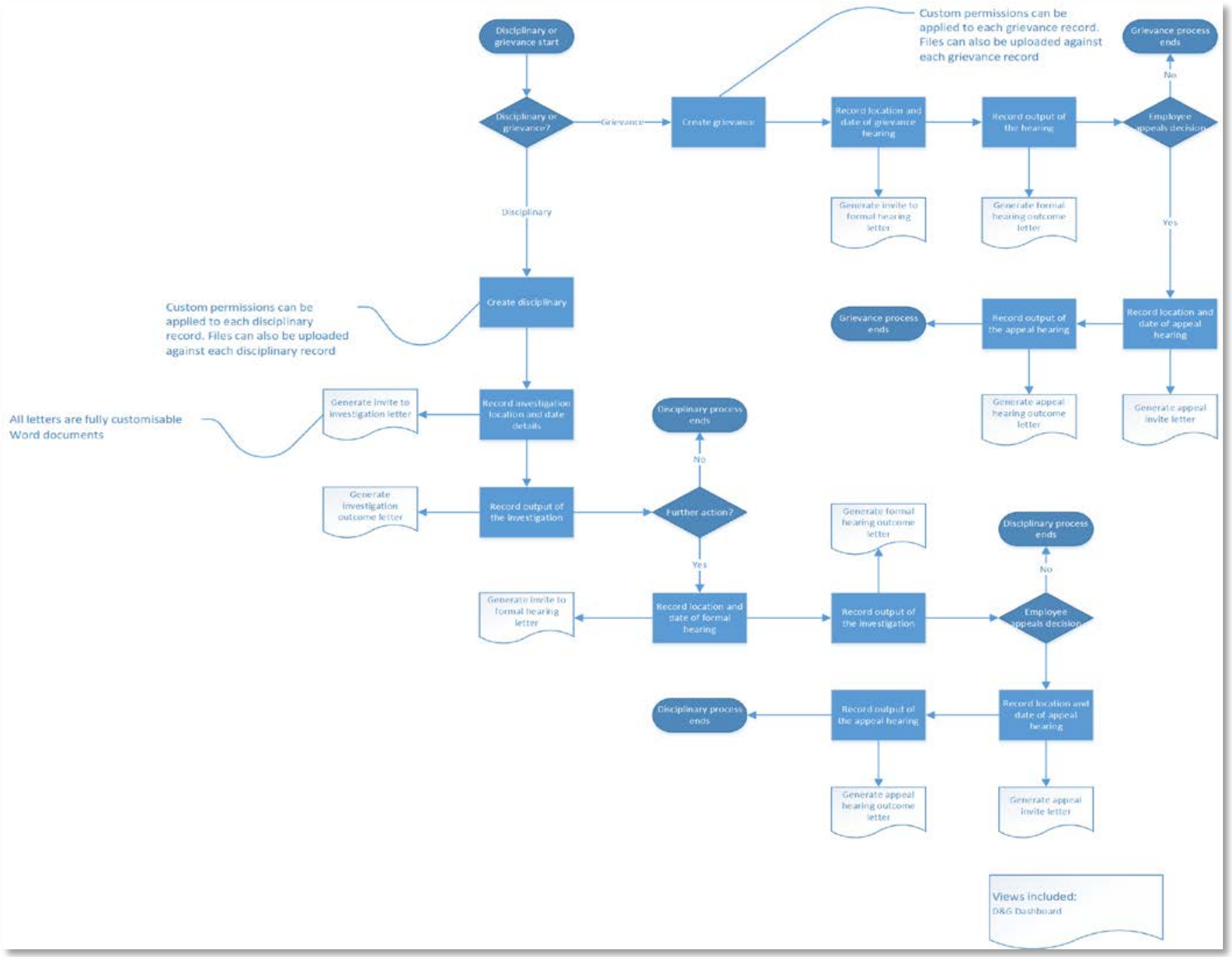
Disciplinary and Grievance



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Employee Appraisals
Renumeration & Benefits
Employee Asset Management
Disciplinary & Grievance
Expenses Management
GDPR
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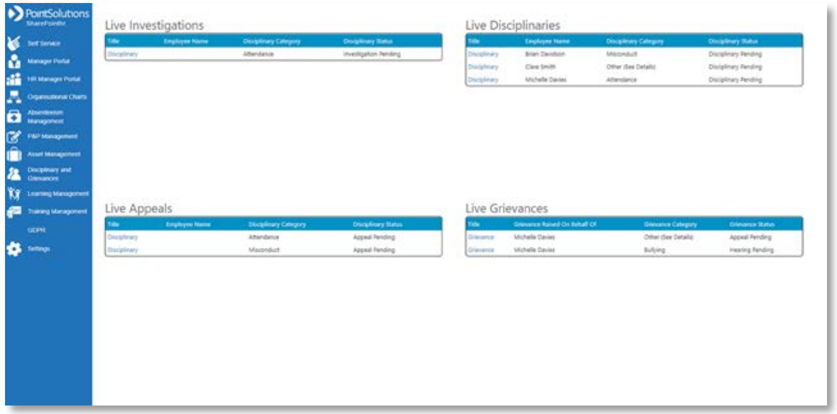
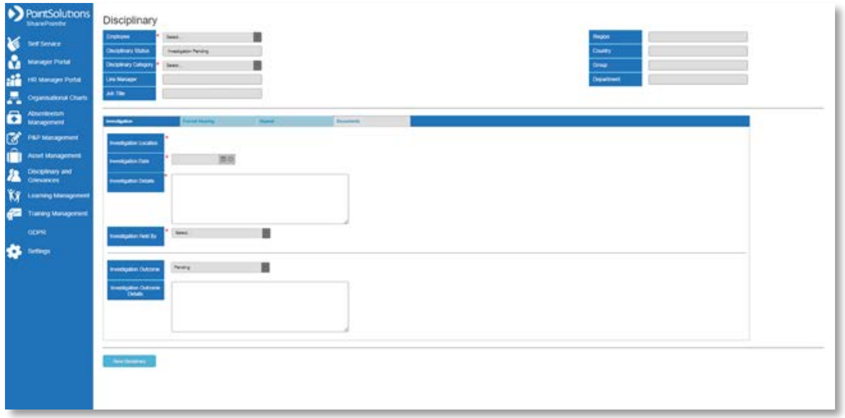
Disciplinary and Grievance



The Disciplinary dashboard displays all Live Disciplinaries, Grievances, Appeals and Investigations.



The Disciplinary form can be filled out as an on-going process, capturing all relevant information to a disciplinary.

Expenses Management

The self-service options within PeoplePoint 365 allows Employees to submit their own expense claims for approval.

Claims can be built-up over a period and submitted on a specific date (i.e. monthly). The Module facilitates different types of claims lines to be processed (i.e. general and mileage) that request information specific to the type of claim. Claims also include the ability to:

- Select categories
- Cost centres
- Link to projects
- Accounts
- Jobs etc
- Attach receipts
- Select currency and tax rates.

The system records 3-levels of currency against each expense claim line – expense currency, employee currency and organisational currency. This facilitates reporting at individual claim level and consolidated reporting at employee, departmental and organisational levels – across multiple currency zones.

Expenses rules can be applied based on job role and expense category in order to enforce policy, i.e. xx amount for hotel stays, meals, travel etc.

Once the approval process is complete the system provides 3 output options, i) payroll dashboard to view – to review and process; ii) export file for possible import into a payroll system and; iii) payroll integration – dependent of capability of payroll system and integration point can be built to provide automated payroll update from expense claims sign-off.

Reporting outputs include analysis by employee, department, company and expense budgets can be allocated at department level to provide budget vs. actual analysis.

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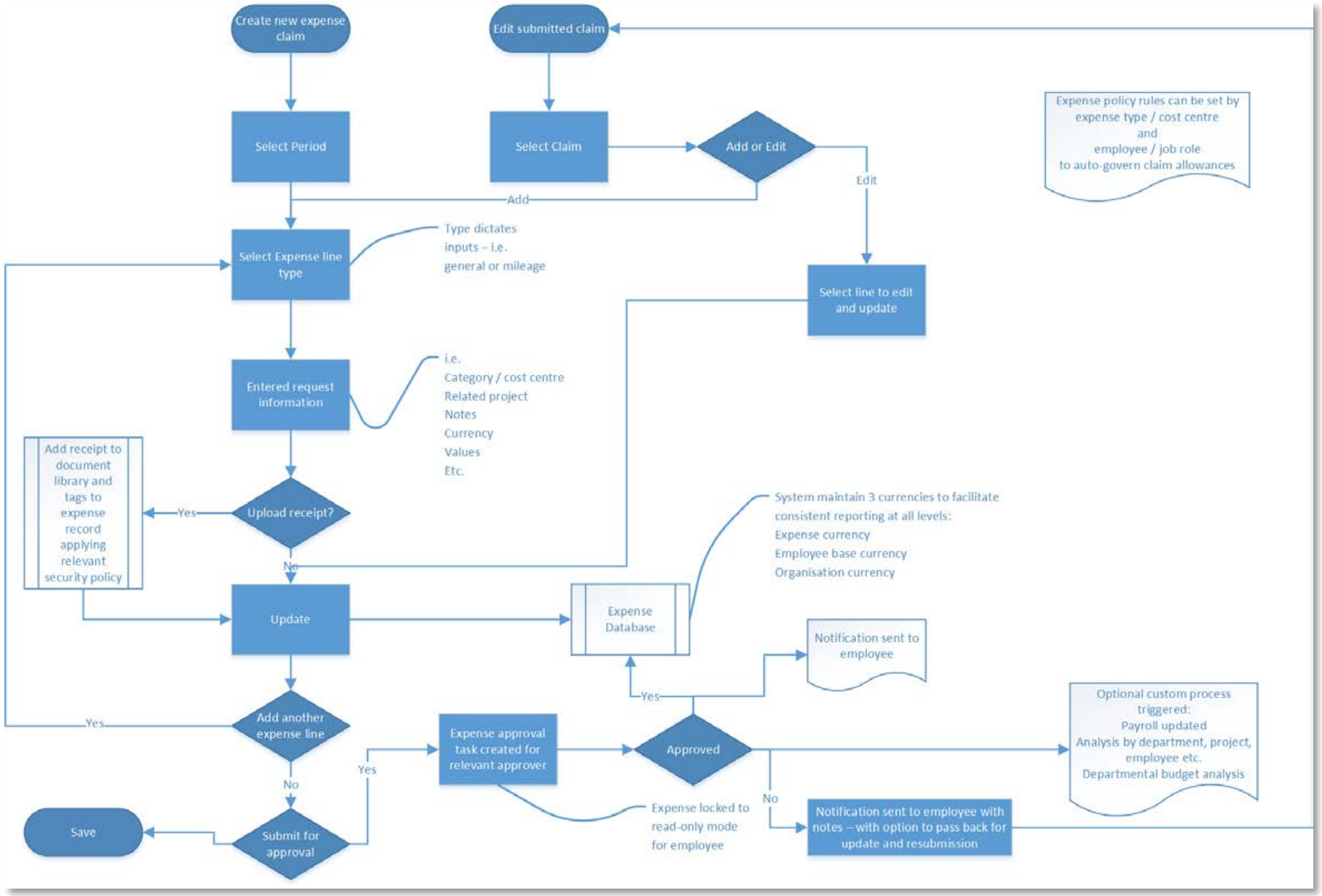
PeoplePoint 365
Modules

Expenses Management

- Self-service allows employees to build and submit their own expense claims.
- Claims can be built up over time and submitted on a specific date.
- System facilitates categorisation of expense types which can be reported on and compared against a budget.
- Expense claim details can be tagged to specific project, customer, job, etc.
- Multi-currency is supported on claim record for non-mileage claims.
- Attachments can be added to individual claim records as proof of expenditure.
- Expense approval can facilitate up to three level of approval, line manager and two additional stakeholders (I.e. finance and payroll).
- 'Mass approval' dashboards are available for stakeholder sign off.
- Expense data can be output into a report for payroll or even integrated directly into a payroll system (depending on the system).
- Mileage claim support deduction of home-to-work mileage.

PeoplePoint 365
Modules

Expenses Management



PeoplePoint 365

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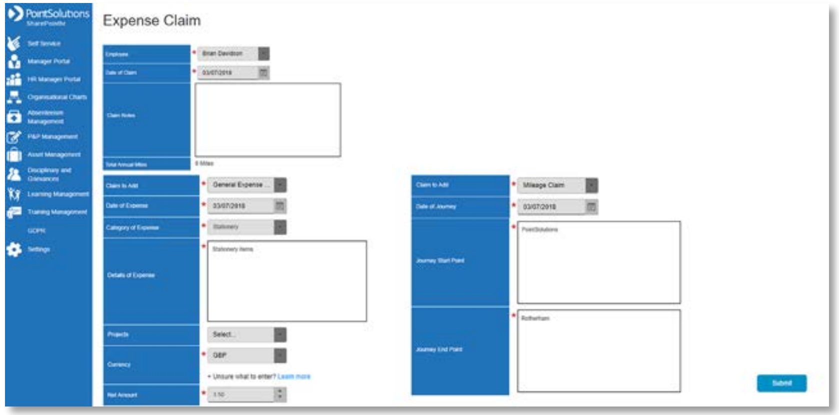
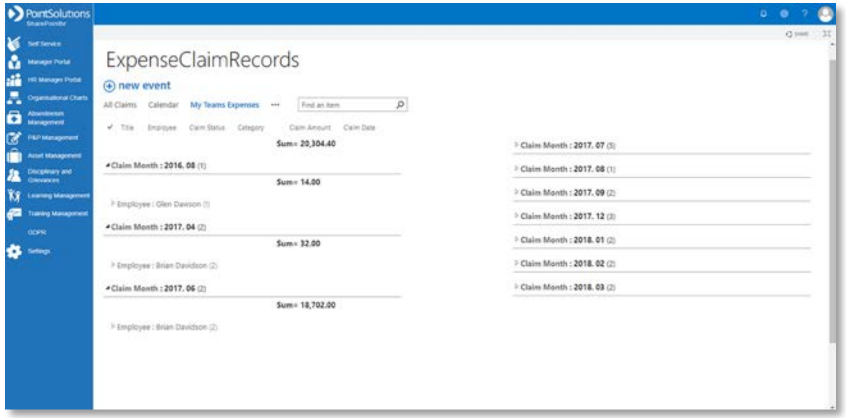
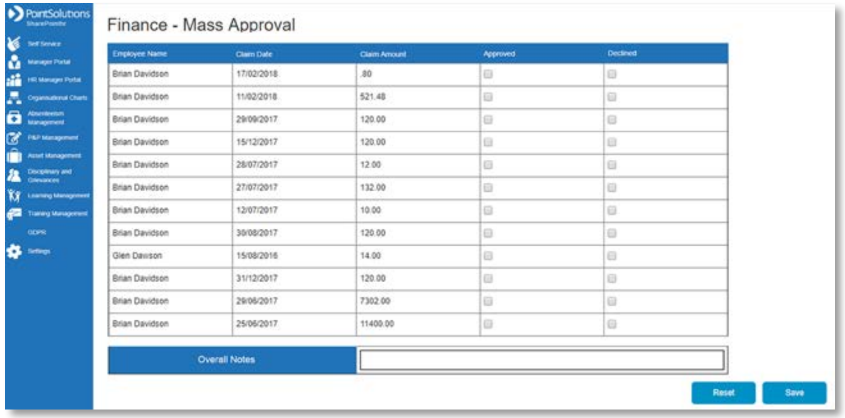
Expenses Management



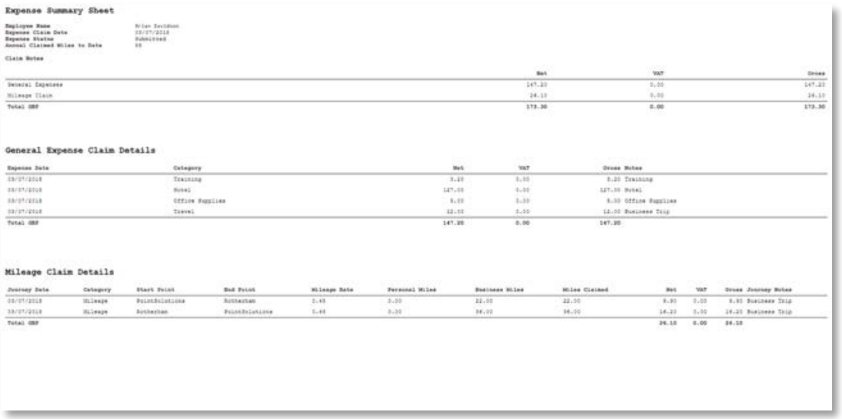
Expense claims are facilitated through a form which can accommodate various expense types.



The Expense Claim Records ensure a full audit trail is kept on each Employee's expenses.



PeoplePoint 36 facilitates Mass Approval for Expenses, usually applicable to Finance Departments.



Users are presented with a summary sheet of expenses as a reference for each claim.

GDPR

PointSolutions commit to updating their Apps from a number of drivers as part of the software assurance (provided within the SAAS licensing model) such as (but not limited to):

- Client requests
- Technology improvements
- Market requirements
- Legislation introduction

In the example of GDPR legislation, compliance and regulation was the driver for an enhancement to the system.

The Policy and Procedure Module has been enhanced to facilitate the classification of policies relating to GDPR – this surfaces non-complaint Employees in respect to signing of GDPR policy. This supports the fact that Employees need to be aware of organisational policy and that they need to be aware of their rights.

The Skills and Competencies module has been updated to facilitate the classification of competencies relating to GDPR – this surfaces non-complaint Employees in respect to completing GDPR training. This supports the requirement to have an auditable GDPR training log.

In respect to personal data, Employees have the right to know who can view their personal data, where their data is held, for what purpose and for how long. PeoplePoint 365 has all of this information and to accommodate transparency and reduce potential Subject Access Requests (SARs), an Employee GDPR dashboard has been created providing employees with information on who can see their data and who has updated their data.

All of the above has been included within the PeoplePoint license and in addition to this there is an add-on GDPR module (GDPRPoint 365) that provides the ability to create and apply data retention policies, provide SAR and Data Breach logging and escalation processes and includes a GDPR management dashboard that summarises the GDPR compliance, SAR, Data Breach and Risk statuses.

PeoplePoint 365
Modules

Back

GDPR

- Helps towards organisations becoming GDPR compliant.
- Ability to record / manage subject access requests and their respective process through GDPRPoint.
- Ability to record / manage data breaches and their respective process through GDPRPoint.
- Enhanced policies and procedures module facilitates GDPR compliant policies.
- User-friendly interface: GDPR policies are flagged.
- Updated skills and competencies module flags non-GDPR compliant employees.
- LearningPoint 365 application updated to allow indication of GDPR related learning. With sign-off being able to be achieved by way of passing a mini assessment / quiz, the system can help organisations demonstrate understanding of education within the GDPR remit.
- Transparency across the system with sensitive data able to be highlighted in the employee record, surfacing of employee documents to the employee, retention policy log surfaced to employees and overview of security (who can see what data) for employees, all aimed at reducing the chances of subject access requests being raised.
- Reporting dashboards to aid subject access request and data breach management.
- Example of continual added value through software assurance.

PeoplePoint 365
Modules

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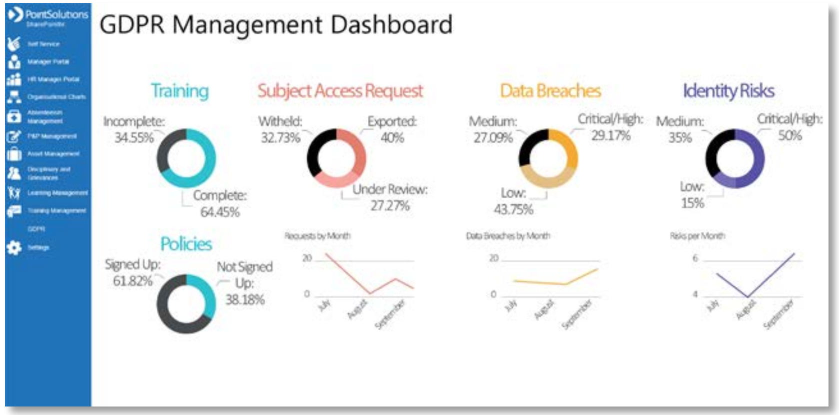
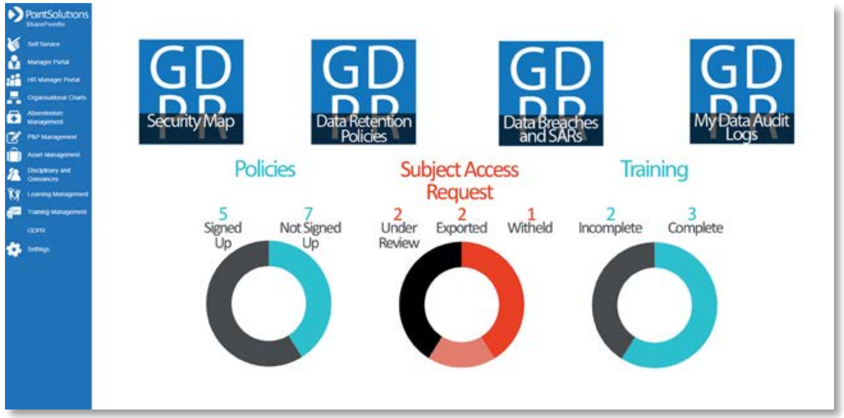
GDPR



Management have a full overview of GDPR KPIs – accessed on a contextual level and can be viewed



GDPR Compliance is tracked as part of the GDPR Dashboard. Users can view GDPR KPIs, retention policies, raise SARs, etc.

PeoplePoint 365
Modules

Dashboards

PeoplePoint 365 includes the ability to set up Stakeholder and Process Dashboards. The Common Stakeholder dashboards are:

- Employee,
- Line Manager
- HR manager
- IT Manager
- Payroll

Dashboards are designed to present information (opposed to having to search or navigate) to the user logged-in, based on the role they fulfil. So, an Employee dashboard facilitates self-service; a Line Manager dashboard will provide a team or department view of information; and a HR Manager dashboard n organisation view etc.

All data presented on the dashboards is contextual and adheres to security policies- i.e. an Employee only sees their own data; a Line Manager, information of the colleagues they Manage etc.

Dashboards are designed to provide focus and as such need to be clear, simple and uncluttered. As such not all information can be presented on a single dashboard, but multiple dashboards can be created – i.e. in addition to your self-service and/or team dashboard, you may have access to an absenteeism dashboard or an expenses dashboard.

The dashboard components consist of ‘quick links’ – the ability to provide direct links to the most commonly used forms; ‘views’ – data views of information in the system, i.e. my tasks, my policies etc. and; ‘charts’ – graphical interpretations of data, i.e. holiday entitlement status dial, employee onboarding task RAG (Red Amber Green) status etc.

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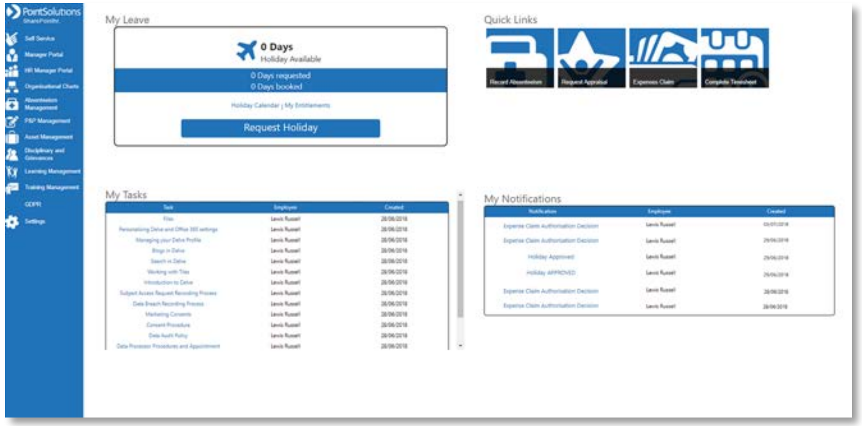
PeoplePoint 365
Modules

Dashboards

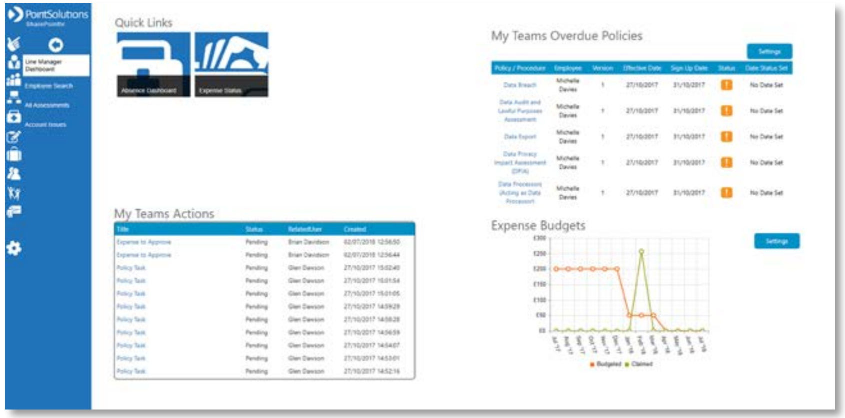
- Stakeholder dashboards enabling easier management by role.
- Process dashboards enable easier management by process / module.
- Dashboards are contextual to the persons access / role within the organisation.
- Contextual dashboards adhere to security policies.
- User-friendly dashboard interface allows data to be access and/or visualised quickly and easily.
- Quick links to most commonly used forms.
- Data grids on dashboard with user friendly, live searching on data.
- Quadrant style dashboards are flexible and easily changeable.
- Dashboards can contain charts from standard system reports.
- Dashboard can surface PowerBI charts built by the organisation.

PeoplePoint 365
Modules

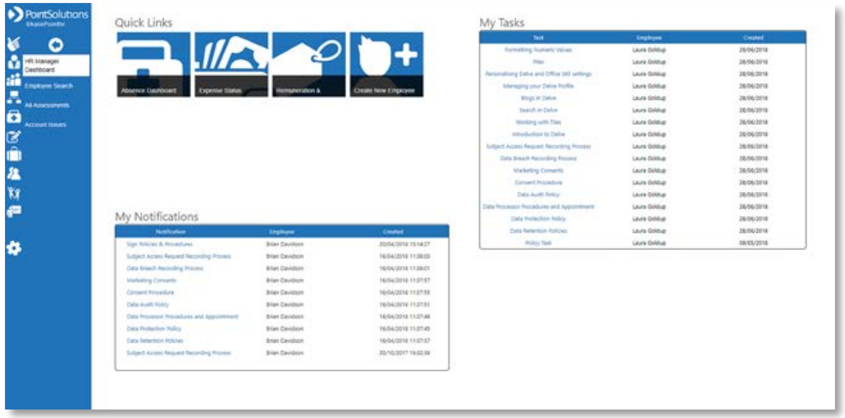
Dashboards



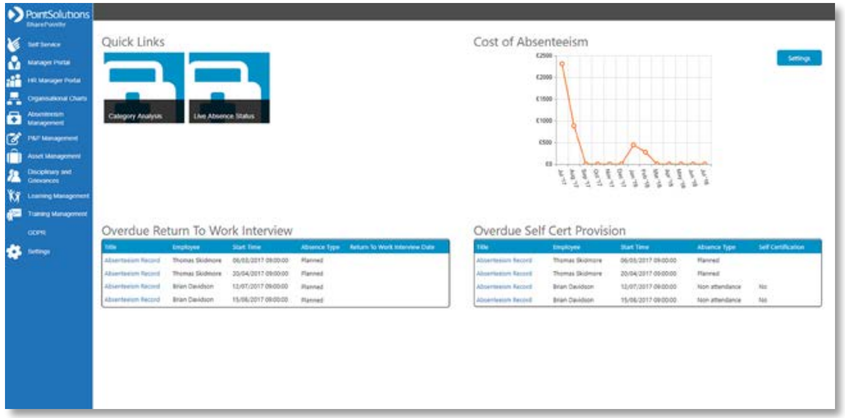
The self-service Employee dashboard facilitates holiday requests, expense requests, Notifications, and Tasks.



The Line Manager dashboard surfaces information relevant to the Line Manager's team.



The HR Manager dashboard surfaces information relevant to the HR Manager.



Alongside Stakeholder Dashboards, PeoplePoint 365 can provide Process Dashboards, such as Absenteeism.

PeoplePoint 365
Modules

Management Reporting

PeoplePoint 365 is installed with over 100 standard reports, covering all the modules included. Some of the most common reports are:

- Employees – demographics; headcount; gender pay gap
- Holidays – employee entitlement status
- Absenteeism – Bradford factor; absenteeism policy triggers
- Policies – overdue policy sign-up by line manager
- Timesheets – working time directive; time analysis by client > project > type of work
- Expenses – monthly expenses by employee > department > company, by type
- Assets – assets maintenance exceeding set parameters
- Appraisals – objective score by employee > department > company, by objective type
- Skills and Competencies – Skills due to expire in the next 60-days

Custom reporting options include:

- SharePoint ‘views’ feature – wizard driven report generator with data-grids, lists, calendar, Gantt chart outputs
- Excel data connection links – ability to link Excel to all the system data sets and utilise the rich charting functionality of Excel and because the system embeds the data connector, each time the data is updated this is reflected in the created Excel charts
- PowerBI – Office 365 PowerBI can create interactive charts linking to all your HR data

All PeoplePoint data is held in SharePoint and/or SQL, so any reporting tool that works within these environment would be compatible.

PeoplePoint 365
Modules

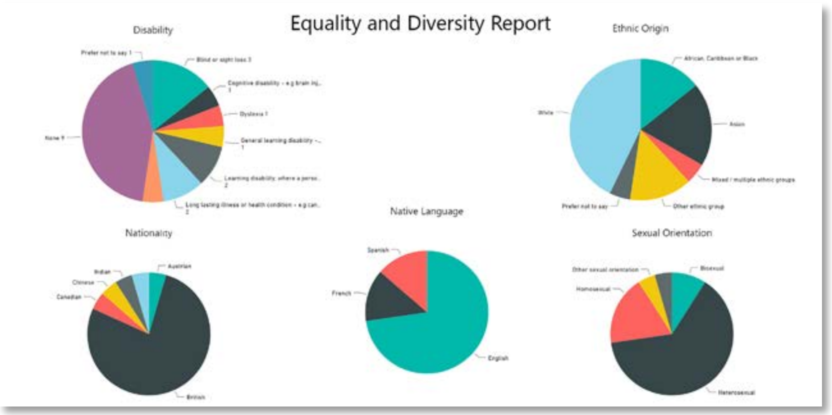
Management Reporting

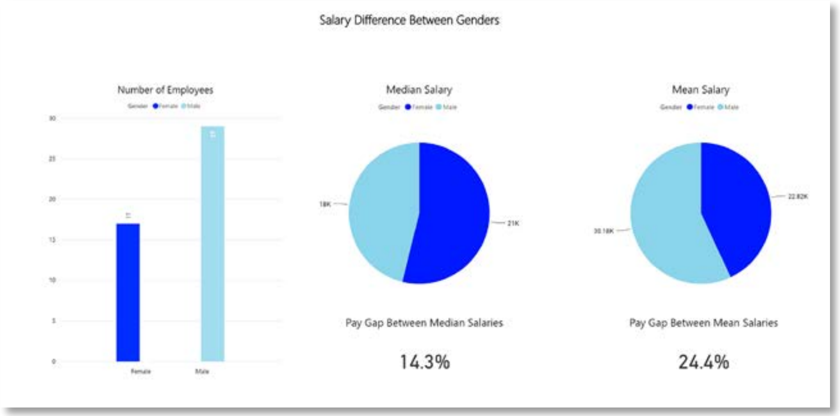
- Over 100 standard reports installed as standard across the application.
- Live, security trimmed, data links to Microsoft Excel for extended reporting capabilities.
- Data links into Microsoft PowerBI for extended reporting capabilities.
- Ability to analyse any data necessary held/defined within the system structure.
- Real-time / live reports and links to additional platforms (i.e. Excel / Power BI).
- SharePoint based views, with real-time search, can be added into app pages easily, with all data security trimmed.
- Reports can be filtered by organisational structure.
- Modern style, visual reports available within the system.
- Access to reports wihtin the system can be controlled by security and the navigation menu's
- Reports built outside the system (i.e. Excel and PowerBI) can still utilise the concept of Single Sign On (SSO)

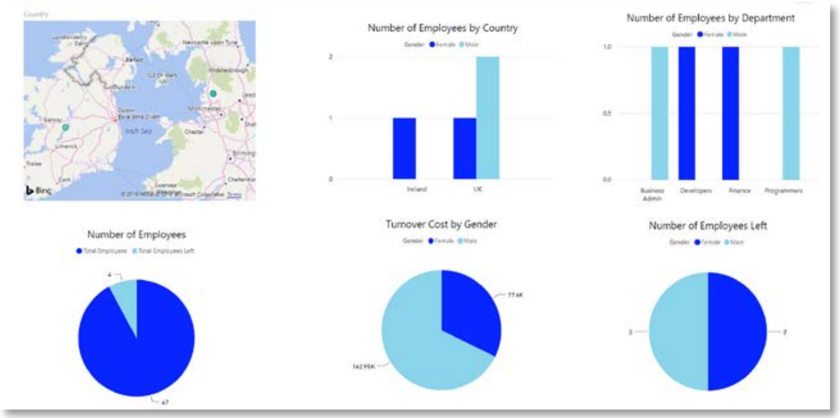
PeoplePoint 365

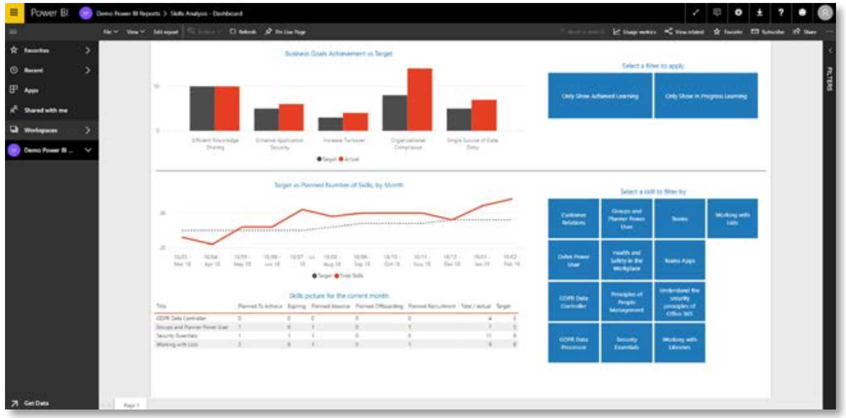
Modules

Management Reporting









PeoplePoint 365 integrates with PowerBi for powerful, real-time reporting and analytics.

Permissions and Security

PeoplePoint 365 includes comprehensive security policies to manage access and permissions concerning Employee Data and Records. The matrix controls who can see and edit different fields within an Employee Record, all the different process records (i.e. absenteeism records; timesheets etc.) and Employee Documents. Different policies can be set for different types on record – i.e. finance may be allowed to see timesheet and expense records for employees, but not necessarily appraisals, disciplinaries etc.

Stakeholder settings dictate who can see Employee Data Records; who can edit; and with respect to edit, whether information is automatically updated (i.e. Employees updating their personal contact information); whether Notifications are required (i.e. Employees updating their bank details) or; whether authorisation is required (i.e. line managers requesting changes).

The organisational structure is aligned to the permissions matrix to facilitate security policies across the organisation – i.e. Relational to Company, Region, Group, Department.

Automated change controls are built-in, such that if an Employee's Line Manager changed for example, all security access would be updated in line with policy.

There are 2 levels of security as a minimum (additional levels can be added, such as multi-factor authentication) - Authentication and Authorisation. Authentication governs who has access to the system and this primarily uses Active Directory, which allows single sign-on. Authorisations then takes over to govern what uses have access to within the system and the policies for processing data.

The comprehensive security structure allows definitions at every level, from module, process, sub-process, process records, database records, data fields, data entry and data views.

The policies provide a contextual user experience, in that users have access to the modules, processes and data associated with their role, but they are only presented with the data and process options within these areas that comply with their security policy - I.e. employees only see their own data; line managers, employees they are responsible for themselves.

Permissions and Security

- Comprehensive security policies manage access and permissions of sensitive data.
- Security matrix mapped to your organisation structure.
- Policy templates set by stakeholder / role.
- Appropriate policies can be assigned for different types of record.
- Stakeholders dictate permissions.
- Change control policies trigger notifications, authorisation requests and effective-date updates
- Facilitates self-service for defined data fields.
- Comprehensive audit trail of all changes.
- Automatic security changes against all records if change dictates (I.e. change of line manager etc.).
- Ability to flag data fields as mandatory and have them escalated.

PeoplePoint 365

Modules

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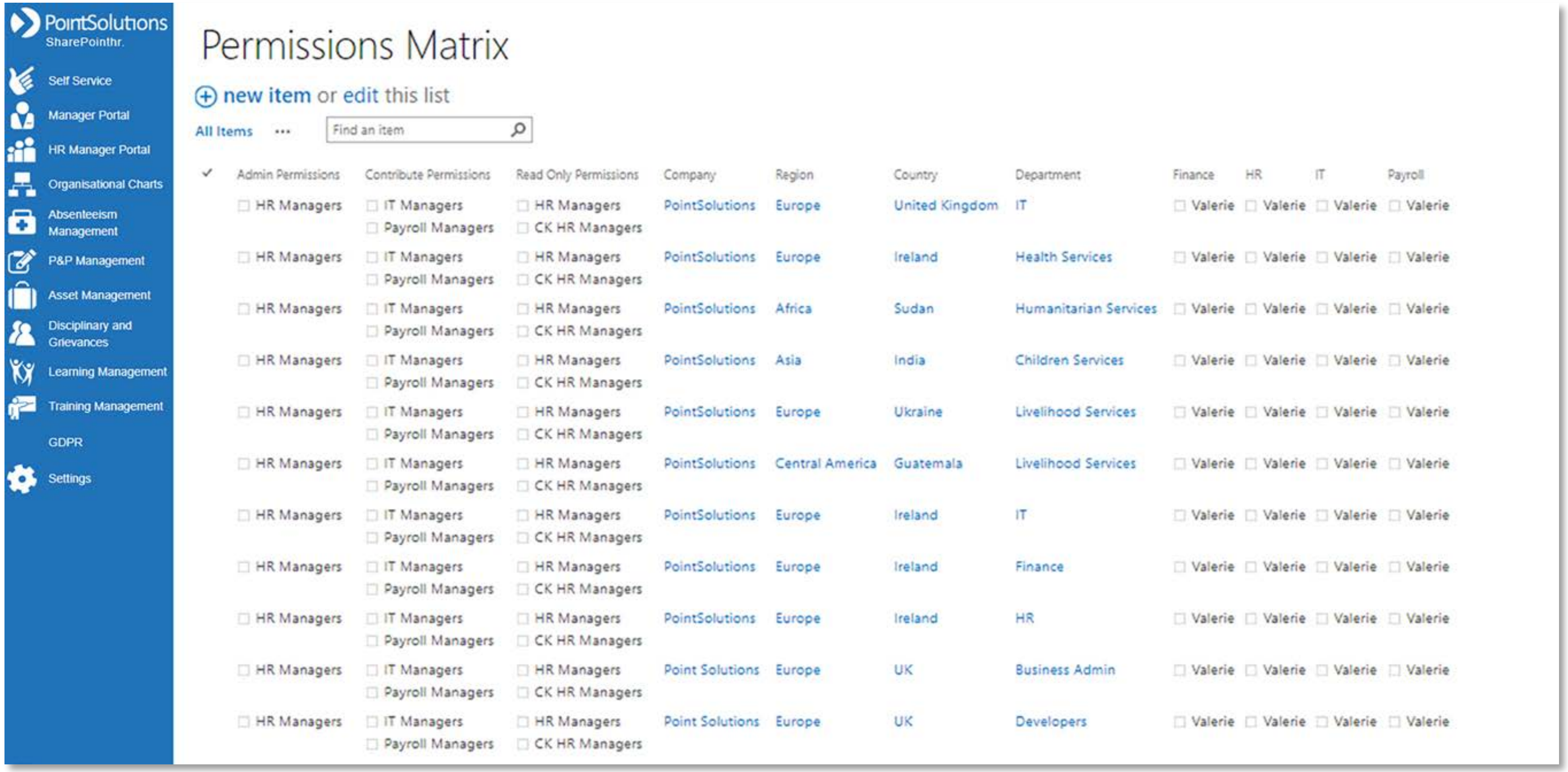
Permissions and Security



Admin Permissions	Contribute Permissions	Read Only Permissions	Company	Region	Country	Department	Finance	HR	IT	Payroll
HR Managers	IT Managers Payroll Managers	HR Managers CK HR Managers	PointSolutions	Europe	United Kingdom	IT	Valerie	Valerie	Valerie	Valerie
HR Managers	IT Managers Payroll Managers	HR Managers CK HR Managers	PointSolutions	Europe	Ireland	Health Services	Valerie	Valerie	Valerie	Valerie
HR Managers	IT Managers Payroll Managers	HR Managers CK HR Managers	PointSolutions	Africa	Sudan	Humanitarian Services	Valerie	Valerie	Valerie	Valerie
HR Managers	IT Managers Payroll Managers	HR Managers CK HR Managers	PointSolutions	Asia	India	Children Services	Valerie	Valerie	Valerie	Valerie
HR Managers	IT Managers Payroll Managers	HR Managers CK HR Managers	PointSolutions	Europe	Ukraine	Livelihood Services	Valerie	Valerie	Valerie	Valerie
HR Managers	IT Managers Payroll Managers	HR Managers CK HR Managers	PointSolutions	Central America	Guatemala	Livelihood Services	Valerie	Valerie	Valerie	Valerie
HR Managers	IT Managers Payroll Managers	HR Managers CK HR Managers	PointSolutions	Europe	Ireland	IT	Valerie	Valerie	Valerie	Valerie
HR Managers	IT Managers Payroll Managers	HR Managers CK HR Managers	PointSolutions	Europe	Ireland	Finance	Valerie	Valerie	Valerie	Valerie
HR Managers	IT Managers Payroll Managers	HR Managers CK HR Managers	PointSolutions	Europe	Ireland	HR	Valerie	Valerie	Valerie	Valerie
HR Managers	IT Managers Payroll Managers	HR Managers CK HR Managers	Point Solutions	Europe	UK	Business Admin	Valerie	Valerie	Valerie	Valerie
HR Managers	IT Managers Payroll Managers	HR Managers CK HR Managers	Point Solutions	Europe	UK	Developers	Valerie	Valerie	Valerie	Valerie

PointSolutions Applications follow a security matrix to enable users with appropriate permissions to access information relevant to their role, and also displays who can access what information.

Notifications

PeoplePoint includes Notifications as part of the processes.

These are different to tasks and emails which are also included within the system. Notifications are reserved for informing employees of outcomes of processes, such that communications are retained in the system and not lost within the wider email world, i.e. confirmation of a holiday, expense, timesheet approval etc.; reminder of an appraisal review or a disciplinary hearing etc.

Tasks are also allocated as part of the processes, but these have a required follow-up action (opposed to a notification) For example:

- Holiday
- Expense
- Timesheets request for approval
- Planned absenteeism for approval

Emails can be triggered from notification and/or task creation and this is discussed as part the implementation process in defining the engagement strategy with employees. For instance some organisations are trying to limit the number of emails employees receive and if a HR system started sending out volume emails this could be counter-productive. The balance between dashboards presenting information, notifications being sent, tasks being allocated and emails is a key discussion topic and is totally dependent on your own specific requirements.

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PeoplePoint 365
Modules

Notifications

- Notifications included as part of the process.
- Notifications reserved for informing employees of process outcomes – I.e. holiday confirmations, expense authorisations, timesheet approvals etc.
- Separate notification system ensures communications are not lost.
- Tasks present follow-up actions.
- Completing actions automatically closes related tasks.
- Automatic e-mail trigger functionality from notifications and task creations.
- Limits volume emails to employees.
- Information is surfaced on dashboards – one place for everything.
- Multi communications mediums provide desired levels of information alerts and escalations.

PeoplePoint 365
Modules

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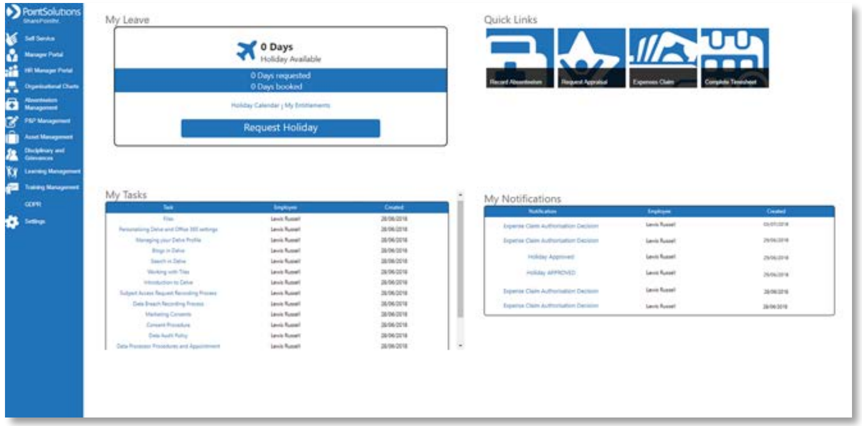
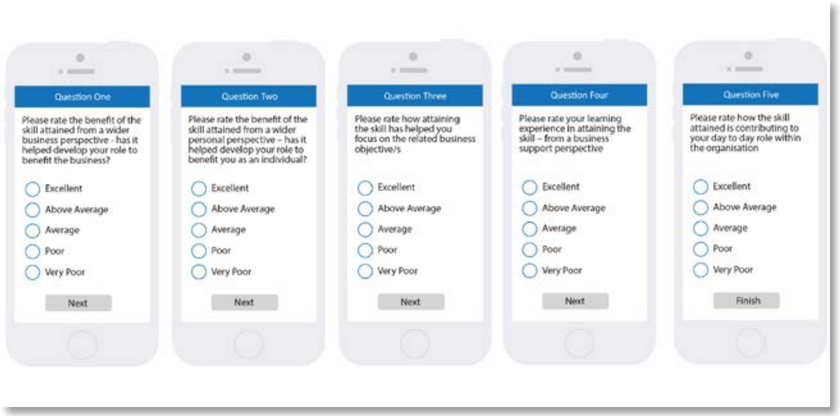
Notifications



The self-service Employee dashboard facilitates holiday requests, expense requests, Notifications, and Tasks.



PeoplePoint 365 utilises Microsoft Flow to automatically send mobile notifications to request feedback on Learning.

Skills and Competencies

PeoplePoint 365 incorporates the ability to log an employees skills and competencies and as part of the logging, defining the type of skill, the date attained and the expiry date (if valid).

The expiry date facilitates the surfacing of skills renewals on employee and management dashboards to ensure skills are not unintendedly lost.

The logging of skills and competencies and continual update provides an audit trail of achievements for the employment lifetime of an employee. The initial recording of skills and competencies can be included as an onboarding task for the employee.

The Skills & Competencies module within PeoplePoint 365 provides a core logging and renewal flagging system. Should you wish to extend this to a full learning management system, where learning profiles can be created for continual personal development; compliance or mandatory learning profiles can be allocated and monitored and / or; provisioning of a full training course management system, then please review PointSolutions' LearningPoint 365 App, which provides all this functionality and more.

Skills and Competencies

- Ability to log employee skills and competencies.
- Skills renewals automatically surfaced on relevant dashboards.
- Continuity of skills updates.
- Employee lifetime employment audit logs.
- Initial recording of skills and competencies can be updated as part of employee on-boarding.
- Synchrony between Skills & Competencies and LearningPoint 365 if and when functionality requires extending.
- Organisational skills matrix generation from the logging of employee skills and competencies.
- Skills and competencies linked and viewable from an employee record.
- Skills and competency categorisation aids compliance by employee and / or by compliance requirement.
- Skills and competency categorisation facilitates assessment of required skill-sets.

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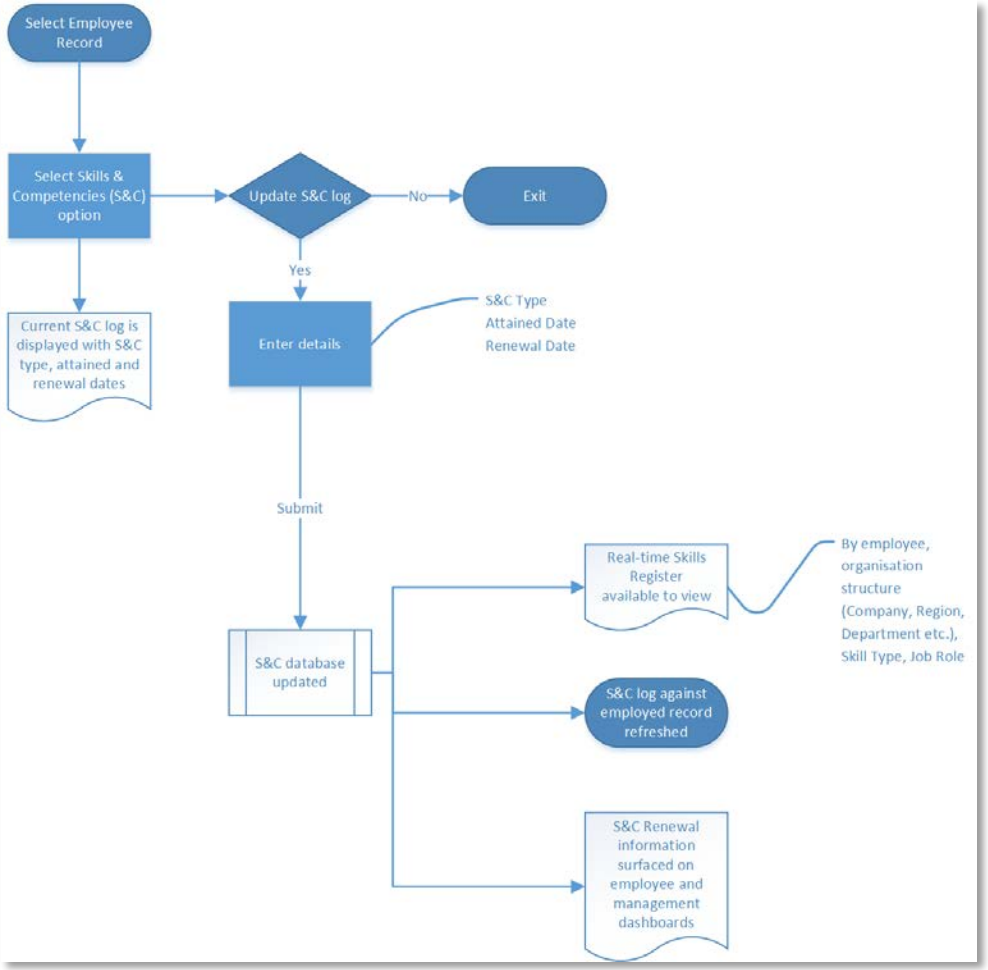
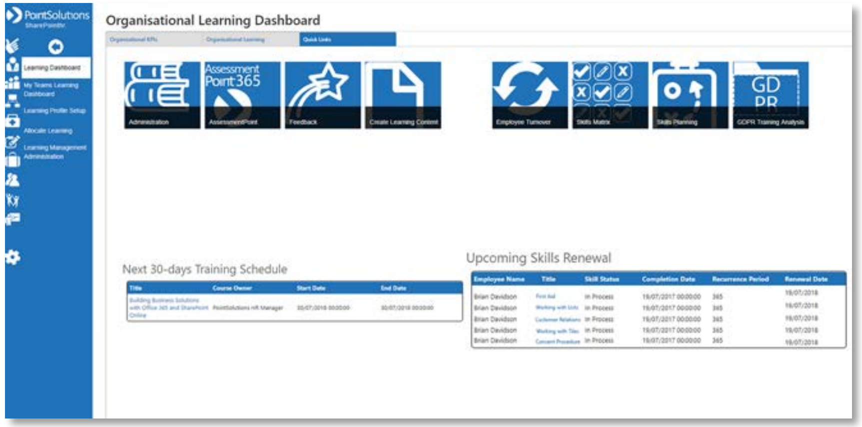
Skills and Competencies



PeoplePoint 365
Modules

Skills and Competencies



The Organisational Learning Dashboard provides HR Managers with an overview of Learning in the organisation.

The Skills Matrix provides a visual overview of Skills and Competency statuses.

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