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People Inc. HR Module



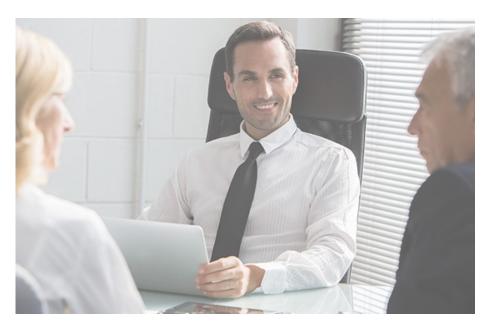
The People Inc. HR module is designed to record and manage comprehensive employee records, automate and streamline HR processes, and help organisations adhere to employment legislation. The system is designed to manage a wide range of personnel, training and recruitment information and generate reports and letters.

In addition to the information recorded about each employee, features are provided to manage staff holidays and absence, training and appraisal records, details of pay and benefits, medicals, equipment, disciplinary records, and much more. Users can attach documents to employee records and the system will help manage HR processes and generate reminders for key dates.

Design tools are included with the system. Users can adapt and personalise their system quickly and easily. All of the existing screens and reports can be adapted, and users can add any number of new reports, fields and screens to the system. This means that People Inc. will always accommodate and meet all of an organisation's needs (for example when internal HR policies or procedures change).



Employee Self Service Module



The People Inc. Employee Self-Service module provides controlled access to the People Inc. system via their web browser (on their PC, tablet or mobile phone). Using the ESS employees can request holidays, submit timesheets and expenses, and update their personal details. Employee Self-Service provides access to information, helps to minimise an organisation's reliance on paper-based forms, it improves accountability and speeds up the time needed to respond to requests.

Where requests are made via the ESS, these are routed to line-managers for approval, and (once approved) the details are recorded automatically within the People Inc. system. If required, using this tool, your managers may also access some employee-related records allowing them to see and maintain the information.

As a communication tool, the ESS can be used to distribute news, company statistics, employee contact details, HR documents (such as the employee handbook) and HR policies. A number of forms are provided with the system, for example a sickness registration form, but users can add further forms. This might include a uniform request form, a training feedback form, or an online appraisal form.



Time & Attendance Module



Designed to roster staff and manage their timekeeping, the People Inc. *time* module combines hardware and software elements to provide a fully featured Time & Attendance solution. Integration with the People Inc. HR module ensures that only one set of employee details, and one set of absence details are required.

The People Inc. time module will record and manage shift patterns, and then collect real-time clock information using either proximity or biometric clocks. A software clock option provides similar functionality from a PC or mobile phone. Organisations can also use the People Inc. time module to manage access-control.

Using the roster information and the clock information, the system can then highlight absence (including late arrival and shortened working days), calculate overtime, and manage flexi-time. Users can then extract information for payroll-processing.

Shift-pattern and employee attendance information can be made available (to individuals) via the People Inc. Employee Self-Service module



Managing Employee Records

The management of employee records is *the* corner-stone of the People Inc. system, enabling organisations to replace paper-based files with centralised electronic records. Comprehensive employee information can be recorded and managed within the system, including full historical records, an unlimited number of attached documents, and employee-related actions and alerts.

Recording employee information within a secure HR system has many benefits. Details are kept in just one place, making them easy to find, and easy to maintain. Users are granted access to records based on their needs (or their role). Reports can be generated quickly and easily. Having one centralised, secure system helps organisations comply with data-protection (GDPR) legislation.

Each employee has their own record within the People Inc. system. This contains their personal details and employment information. Employee records cover the full employment life-cycle: from recruitment to retirement, and help to manage contract details, on-boarding, right-to-work, and equal opportunities. The content of employee records can be customised to suit the needs of any organisation; new fields (text, dates, pick-lists, images, notes, etc.) can be added and the screen layout changed.

Any number of electronic documents (including scanned documents) can be attached to employee records. This might include the employee's CV, a signed copy of their employment contract, copies of certificates and forms, copies of letters sent to the employee, and other documents. Employee photographs can also be saved within their record.

The system also records and manages historical information. This includes a full job history, a history of salary and benefits, historical absence records, and training and development records. Each of these areas include multiple sets of historical records. Further historical employee records include medicals, equipment issued to employees, disciplinary incidents, and records of accidents at work.

As with the main employee screen, users can make changes to the existing historical screens (adding new fields and adapting the layout). Users can also add any number of new historical screens. These might be designed to accommodate information that has (until that point in time) been recorded within spreadsheets. Examples might include a career history, pension details, health club membership details, branded clothing issued to individuals, etc.

- Record and manage employee details
- Employee photographs
- ✓ Record employee contact details
- ✓ Manage equal opportunities details
- ✓ Attach files (scanned documents, etc.)
- Manage right to work information
- ✓ Record employment contract details
- Record and manage full job history
- Manage part-time staff and FTE
- Manage holidays and absence
- Record details of pay and benefits
- Manage staff training and development
- Record details of medicals
- Manage equipment issued to employees
- ✓ Manage disciplinary incidents
- Record emergency contact details
- Record details of accident at work



Managing Employee Records

The People Inc. HR system records a weekly work pattern for employees (more comprehensive shift patterns can be recorded in the Time and Attendance version of the system). This enables users to manage part-time staff (and the employee's FTE can be used to pro-rate benefits such as holiday allowances).

Employee reports can be generated quickly and easily. Reports can be printed, or used to generate MS Excel or PDF format documents. A comprehensive selection of standard report templates are provided with the system and users can adapt these or add new reports as required. Additional reports examples can be downloaded from an online report library. Reports can include any selection of data (including data stored within custom fields and screens).



Letters and e-mail can be generated using mail-merger templates. These are defined using MS Word and can include merged data from within the system. Copies of letters and e-mail messages generated in this way can be saved as attachments within the system.

The Action list provides the means to record both historical notes (relating an employee) and with future actions. Future actions can be given a planned date, and when the action is due, the system generates notifications and reminders via e-mail. It is also possible to get the People Inc. system to automatically add actions based on rules. For example, this can be done when an employee has reached the end of their probation, or when an employee's passport has expired.

The information made available to each user is managed using an access-profile. This determines the level of access they have, the information they are allowed to see (and update) and the features they can use. Access Profiles can be modified, and new profiles can be added to the system as required.

Using their Employee Self-Service log-in, employees can see their own records (limited by the scope of their access profiles), and can submit changes to both their own contact details and to the details of their emergency contacts. HR are notified of these changes.



Pay and Benefits

The People Inc, system provides a range of features to help manage salary and benefits records. This includes a screen to record historical salary information, and another to records a full benefit history. Tools are provided to help manage salary reviews, and all salary-related changes are collated so that they can be exported to payroll.

The system keeps a full history of employee salary details. These can be used in both reports and letters. Each entry includes salary, currency, pay-frequency and pay-basis (per annum, per hour), contractual hours and FTE. Additional information is then calculated (Full Time Salary, Salary per Payment, etc.). Future salary figures can be recorded in the Salary History. The employee's current salary information is automatically displayed in their main employee record.

A full history of benefits can be recorded for each employee. This can include company car details, pension information, child-care vouchers, private healthcare details, travel loans, etc. This information can be used in reports, for example to generate a total remuneration statement for each employee. Employees can buy and sell holidays using the People Inc. ESS module. This makes an adjustment to their annual allowance within the system.

The People Inc. Salary Review Manager tool is used to update salary information for groups of employees. This is done via a grid-view on the screen or by importing a spreadsheet containing the new figures. Percentage or fixed-amount increases can be applied for groups of employees using this tool. It is then possible to generate salary review letters using the letter-generation feature within People Inc.

The Payroll Change Log collects together all of the changes that relate to payroll processing (new starters, job change, salary change, updated bank details, leavers, etc.). The log is updated automatically when users make changes to details elsewhere in the system. Entries in the Payroll Change Log can be extracted at the end of a pay-period and sent to payroll for processing.

- ✓ Record full salary history details
- Manage employee benefit history
- Salary review feature
- ✓ Integrated payroll change log
- ✓ Payroll export
- ✓ Online payslips feature
- ✓ Submit and process expense claims
- Manage pension auto-enrolment
- ✓ Manage bank details



Pay and Benefits

The on-line payslip feature is used to import batches of employee payslips (usually done month-by-month) and make them available to individual employees. The payslips are attached employee records in the system; a full history of payslips can be retained. Individuals view their payslips via the Employee Self-Service module.



Employee can complete and submit expense claims using the People Inc. system (via their PC, tablet or mobile phone). The expense claim form is designed to record a list of entries; it is then possible to attach images of receipts if required. Rates can be set for mileage claims, and individual entries can be categorised (accommodation, travel, etc.). Claims are routed to the employee's manager for approval. Once approved, the information can be extracted and passed to payroll.

It is possible to add custom screens to People Inc. to manage employee benefits. For example, screens can be added to manage detailed information about private healthcare schemes, or pension information. Users also often add custom screens to record bonus and commission payments within the system. All of this information can then be used in reports and letters.

The People Inc. pension auto-enrolment add-on helps organisation manage

pension information and employee opt-out. Using this feature, organisations can record pension details for employees. The system will identify the employees who are eligible for auto-enrolment and users can then enrol them in a pension scheme. Employees can opt-out of a pension scheme by filling out an on-line form. Employees can also complete a request to be enrolled (or re-enrolled) in a pension scheme.



Holidays and Absence

People Inc. provides functionality to record and manage most aspects of employee absence. This includes features to define categories of absence (holiday, sickness, unpaid leave, etc.), set up absence allowances, record absence history, process absence requests, register sickness, and record return to work information.

A full range of user definable absence categories can be managed within the system. This normally includes holidays, sickness, maternity, paternity and parental leave. Users can add further categories as required (for example, study leave, furloughed, unpaid leave, jury service, compassionate leave, etc.).

It is possible to define rules to manage absence of a particular category. For example, rules are used to assign a number of days holiday each year, or to award additional holiday based on length of service. Absence can be managed in hours or in days and allowances can be automatically adjusted using the employee's FTE. Any number of rules can be used, so absence can be managed slightly differently for different groups of employees.

As bookings are made, annual allowances are updated automatically. The time deducted for a bookings automatically takes both the employee's work pattern and bank holidays into consideration. Absence bookings can be viewed in absence calendars. These can show an entire year for an individual, or a range of dates for a department or team.

Employees can submit holiday requests (and requests for other categories of absence) using their PC or mobile phone. Calendar based screens will show them when other team members are away from work, and the system will ensure that they do not take more leave than they are allowed.

If they change their mind, employees can then ask to withdraw a holiday requests. If the period of leave has already been approved, a withdrawal request is then sent to their line manager.

At the end of the year the allowances can be reconciled and then renewed for the coming year. This process takes into account the rules for carry-over (maximum number of hours/days and how quickly these hours/days need to be taken).

- ✓ User defined absence categories
- Define multiple absence rules
- Assign annual allowances (in hours or days)
- Pro-rate absence allowances using FTE.
- Record adjustments against allowances
- Automate carry over (and catty over expiry)
- Record full absence history (hours or days)
- ✓ Adjust bookings for employee work pattern
- ✓ Automatically adjust for bank holidays
- ✓ Submit holiday (absence) requests
- ✓ Submit withdraw holiday requests
- Submit and process TOIL (accrual requests)
- Manage the sale and purchase of holiday
- √ Manage Maternity/Paternity/Parental Leave
- ✓ Submit electronic sickness registration form
- ✓ Submit sickness return to work form
- ✓ Personal absence calendar (12 months)
- ✓ Team absence calendar (check availability)



Holidays and Absence



Where employees work outside their normal hours, it is possible for them to submit Time off in Lieu (TOIL) accrual requests. These are routed to their line-manager for review. Once approved, the employee can then book the time off via the system. Alternatively, it is possible to make manual adjustments to allowances to manage TOIL accruals (manual adjustments might be made for a variety of reasons).

Employees can request the sale (or purchase) of holiday via their ESS account. Once approved by their line manager, these requests automatically update the employee's holiday allowance. It is also possible to make manual adjustments to allowances to record details of holiday sale/purchase.

Full details of maternity, paternity, and parental leave can be recorded and managed using People Inc. (this includes key dates and keeping in touch days).

If they are running late, employees can complete a late arrival notification form via their ESS account. Furthermore, when an employee calls in sick, their manager can complete an online sickness registration form. At the end of a period of sickness absence, employees can complete a return to work form (giving details and attaching a *fit note* if necessary).



Employment

HR information relating to all stages of the employment life-cycle can be recorded using People Inc. This follows each employee from recruitment to retirement. Once employees have left, full records are retained within the system until they have to be removed to comply with GDPR.

A fully featured recruitment section is included within the People Inc. system. This enables users to manage details of vacancies and applicants and generate recruitment related correspondence. Individual applicants progress through the recruitment process.

New starters are taken through the on-boarding process. This is usually managed using a series of automatically generated Actions. Actions can be assigned to any staff member (for example, the employees line-manager will play a key role, and IT may need to issue equipment to the employee). As actions are completed they are cleared within the system. Notifications and reminders are generated for outstanding actions. A full history of on-boarding activities is retained for reference.

The HR Policy add-on is designed to help manage the distribution and sign-off for HR policies. This provides easy access to up-to-date copies of policy documents and ensures that staff have read and acknowledged the documents that relate to them and their role.

The People Inc system offers a flexible approach to managing the staff review process. Managers can record details of regular employee Check-in meetings, and can of course schedule and run formal appraisals (recording information via their ESS login). Both of these can reference company and individual objectives.

In addition to aspects of employment that are designed to encourage employees and help promote their careers, it is also possible to manage other, more testing aspects of employment using the system, for example, the disciplinary and grievance processes.

When employees decide to leave, People Inc. can help to ensure that the equipment they have been issued is returned, their benefits and allowances reconciled, and exit interviews organised. After a period of time has passed (usually 6 years), the employee's details should be removed from the system. Tools are provided to ensure that this GDPR-compliance activity is achieved easily.

- ✓ Manage recruitment
- Record right to work information
- ✓ Manage new starter (onboarding process)
- ✓ Manage employee HR Policy sign-off
- Employee probation
- Staff review process (and pay reviews)
- ✓ Manage leavers (exit interviews)



Training and Development

All employees require training at some level. It may be simply induction training designed to ensure that an employee understands the workplace and what is required of them, but most employees will also need to attend a full range of training courses (technical training, training related to legislation, etc.). It is important to ensure that employees have an appropriate level of training to enable them to do their job efficiently and safely.

Providing training for employees will motivate them and enable them to make a greater contribution to the work they do. The People Inc. system enables HR to schedule and monitor a range of different training and development activities.

A full training history can be recorded for each employee within People Inc. This includes details of both the formal courses employees attend, and any ad-hoc training they undertake. Certificates and course feed-back can be recorded against each training event, and where training expires, or a refresher course is required, the system can notify users at the appropriate time.

People Inc. will help users identify and manage training needs. Where training needs are identified for an individual these can be recorded against their records (and monitored to ensure they are satisfied). The system will automatically identify training needs based on an employee's role. People Inc. will also generate training needs automatically when a training record expires.

While training information is recorded just once, records can be managed from the perspective of the employee (their training history) or from the perspective of the course (a list of delegated attending an event). Taking the course view of training information means that it is easy to schedule training sessions and invite groups of employees (generating invitations and other course material as required).

Where employees have annual training targets (defined by a points system), People Inc. will automatically manage a tally of points using CPE/CPD records. It is also possible to manage training budgets (and training spend) in the same way; where a cost centre is allocated a training budget for the year, it is possible to monitor the training spend and report on these figures.

- Record full employee training history
- Identify and manage training needs
- Training course definitions (administration)
- ✓ Manage Delegate bookings
- ✓ Identify mandatory training needs (by role)
- ✓ Manage CPE/CPD records
- ✓ Manage training using bulk bookings
- ✓ Overview of training via Training Matrix
- ✓ Schedule, manage performance appraisals
- ✓ Online appraisals (questionnaire style)
- Manage employee qualifications
- Competency management (by role)



Training and Development

Tools are provided within People Inc. to manage training using bulk bookings. Groups of employees can be booked onto a course (or be assigned a training need) quickly and easily using these features.



An overview of the training undertaken by a team (or organisation) can be displayed in a Training Matrix tool. This highlights training that has expired, or training that needs to be arranged. Individuals, or groups of employees can also be booked onto a training course using the Training Matrix feature.

People Inc. has a number of different appraisal management options available to users. These tools are designed to schedule, monitor and manage performance appraisals. Appraisals can be completed by line managers (and the information recorded centrally). Both customisable appraisal forms and a questionnaire-style appraisal can be published vie the People In. Employee Self-Service module.

Based on a library of standard competency definitions, employees can be assessed in a quantitively way. Different competencies can be assigned to employees based on their current role (and these can be set at different levels). Reporting tools provide an analysis of employee competency assessments.

Employee qualifications can be recorded and managed using the system. This helps to manage compliance with legislation, and can be used in a competitive tendering process where a team of employees are assigned to a project.



Employee Attendance

People Inc. provides two different ways to manage employee attendance. The People Inc. *time* module is a fully-features time and attendance system designed to create shift patterns, collect clock times, manage overtime, and export attendance details to payroll. Alternatively, the People Inc. Employee Self-Service module provides more-traditional timesheets that can be completed and submitted by members of staff.

The People Inc. *time* module is designed around four key concepts. In the first instance, the user defines their pay-periods within the system. Times are reviewed (and authorised), and attendance information is exported (to payroll) based on pay periods.

The working hours (shift-patterns) for staff are recorded within the system and it is this information that is used to determine whether staff have arrived and left on time, and worked their agreed hours. Shift-pattern information is made available to individuals (via PC or mobile phone).

Employees clock in using either wall-mounted clocks, via their PC, or via their mobile phone. Wall mounted clocks with either biometric or proximity readers can be used with the system. Hardware clocks can be linked to electronic door locks to provide access control.

The system compares the shift-patterns and the clock times and highlights any anomalies. Manual entries and adjustments can be made within this part of the system to resolve problems that arise. If staff are late for work the system can generate notification e-mails. Once a manager is happy with the attendance records for their team, they can give authorisation to pass the details to payroll.

- ✓ Define flexible pay periods
- ✓ Unlimited flexible Shift Patterns (roster)
- ✓ Wall mounted clocks (proximity, biometrics)
- ✓ Software clock (OC, mobile phone)
- ✓ Review hours worked by employees
- ✓ Add manual records and make adjustments
- ✓ Pay period authorisation (by line manager)
- ✓ Add rules to automate overtime adjustments
- ✓ Record and manage flexi-time
- Overview of hours worked by pay period
- ✓ Extract hours fo payroll processing
- ✓ Integrated Access control feature
- Complete on-screen timesheets (individual)
- ✓ Complete ream timesheets on-screen



Employee Attendance



Rules can be added to calculate overtime rates. staff in different areas of the organisation will be due overtime at different rates at different times (for example, when working extra hours during the week, at the weekend or on bank holidays). Alternatively, it may be that overtime is added to a flexi-time scheme.

Once approved, a summary of the hours worked (including overtime information) is made available to users. This can be exported for use in the payroll. The same information can be made available to the employee themselves (via the Employee Self-Service module).

Where a full-blown time and attendance system is not required, it is possible to ask employees to complete on-screen timesheets via the ESS. This information is passed to their manager for approval and then on to payroll. Alternatively, managers can complete an on-screen team timesheets that includes overtime information. This is useful when individuals do not have access to the People Inc. system.



The Organisation

While most implementations of People Inc. are set up to manage employees working within one company, the product is designed to accommodate records for multiple organisations operating within multiple regions.

Users can work with multiple companies, or with groups of staff who have different employment terms and conditions (standard hours, etc.). The system will also manage different regional settings (for example different bank holidays in Scotland and Northern Ireland) and even different languages.

The system will generate organisation charts in just a few seconds using the charting plug-in. It is possible to re-work the organisation's reporting structure by dragging and dropping employees (together with those who report to them) within this tool.

Two different tools are provided to generate company statistics from data held within the system. The first is a data-based feature within the database, accessed using reports. The second a graphical tool included with the Employee Self-Service module.

The People Inc. Employee Directory provides contact details and staff-availability information to all system users. It is easy to contact people (call or e-mail direct from the screen), and you can see at a glance if they are likely to be able to take your call.

The People Inc. ESS Scheduler provides and HR calendar that details bookings and key dates for all employees. This includes all training courses, holidays and other absence, anniversaries, and other HR -related reminders (such as end of probation).

The ESS Company News feature is used to publish HR-related information so that it can be read by all staff. For example, this might be pension information, or maybe a new policy document that needs review, or details relating to the furlough scheme.

- Work with multiple companies
- Work within multiple regions (countries)
- ✓ Generate organisation charts
- ✓ Generate company statistics
- Employee directory
- ✓ Scheduler (HR calendar, bookings, key dates)
- ✓ Publish company news



Recruitment

Organisations can manage details of vacancies and applicants using People Inc. It is then possible to look after a range of recruitment activities: register applications, move applicants through their selection process, offer jobs, and take up references. People Inc. can also be used to generate e-mail, letters, and recruitment reports.

Any number of vacancies can be added to the People Inc. system. Approval to proceed with recruitment can be managed within the vacancy record, and it is also possible to manage the timescales and target dates for the different phases of the recruitment lifecycle.

The recruitment web-publishing add-on is designed to show details of vacancies on an organisation's website. The information is managed from the vacancy screen and selected details are automatically listed on the website. Applicants can review details of vacancies and then complete an on-line application form. Their application (together with a copy of their CV) are then added to the vacancy record within the People Inc. system.

Details for any number of applicants can be recorded against a vacancy within the system. These can be added when an applicant visits the organisation's website, or they can be added manually (by the user). It is also possible to attach documents to applicant records (their CV, copies of certificates, letters). Once added, the applicant can then progress through the recruitment process.

Users can use their own steps through the recruitment process: acknowledge, shortlist, interview, offer, accept. At each stage of the process they can generate letters and e-mails based on templates they have added to the system (invitation invites and job offers for example), and attach copies to applicant records if required. If necessary, others within the organisation can be given access to make their contribution, for example line managers can be asked to shortlist applicants

- Register details of company vacancies
- ✓ Manage applications and applicant details
- ✓ Generate letters and e-mails
- ✓ Attach documents: CV, job-offer, etc.
- Applicant shortlisting by line managers
- Schedule interviews
- ✓ Generate job offer (letters, contracts, etc.)
- ✓ Generate employee records from applicants
- ✓ Website integration (online applications)
- ✓ Remove old records (GDPR)



Recruitment

The system enables users to manage a schedule interviews. Documentation to be used during a series of interviews can be generated using reports, and access to the applicants record can be available during these meetings too.

Once an applicant successfully reaches the end of the process, a job-offer and contract can be created, and the system will also generate an employee entry to use going forwards.

As with all personal information, to comply with GDPR, after a period of time it is important to remove records relating to applicants. A tool is provided to manage this process.





Managing Vehicles

People Inc. system provides a centralised approach to managing vehicle-related information. This includes details of company cars, private vehicles and pool vehicles. It is easy to record lease details (including company, amount, lease end-date, etc.), servicing information, insurance information, details of recovery service etc. Having all this information in one place has very obvious benefits.

Where private vehicles are used for business, details of current insurance and servicing information (and NOT details for older vehicles) need to be retained by the organisation (and scanned documents should be attached to records to back-up the information). This will ensure that the organisation does not have additional liabilities where driving incidents occur.

A record of driving incidents (parking fines, speeding and accidents) can be recorded against employee records within People Inc. This might be used to manage the cost associated with the incidents themselves, and may also be needed if the incidents result in some form of disciplinary process.

Records of vehicle servicing can be kept against each vehicle recorded within the system. The system can then generate notifications e-mails (and reminder e-mails) when the next service is due. The same process can be used for insurance renewals (and MOT renewals).

- ✓ Manage details of company cars
- Manage private vehicle details (work use)
- Manage pool vehicles (usage, insurance, etc.)
- ✓ Record details of driving incidents
- ✓ Keep full service history
- ✓ Generate notification and reminders)



Product Trial & Demonstration

We would be delighted to invite you to have a look around our systems. As our products offer an extensive range of functionality and may be of interest to various stakeholders in an organisation we recommend arranging for a guided demonstration of our system before starting a trial. We are happy to repeat a demonstration if required and to answer any questions you may have. If your procurement process requires more information than you have been able to find on our website please let us know and we will get that to you.

Demonstration

Our product demonstrations are a no obligation opportunity to take a guided tour of our products. One of our experienced consultants will arrange a convenient time for an online meeting where you can be guided through the system. If there are particular areas of the system that will be of most value to your organisation, let us know and we will be able to focus on these areas for you.

Trial

We will arrange unrestricted access to a system hosted by us for you to explore in your own time. Our trial system provides you with hundreds of employees across multiple companies with comprehensive records including absence, training, employment, applicants etc. and you will be free to manage them as you see fit using the tools provided. During your trial you will able to access our help desk service which will answer any questions you might have about the system.





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