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# HR FEATURES

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## 1. GENERAL FEATURES

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- No additional hardware, software, or additional Office 365 services needed
- Built "natively" on Standard SharePoint, Teams and Power Platform
- 100% customizable through the SharePoint web interface, MS Flow and Power BI
- Supports SharePoint Server or SharePoint Online
- Designed to provide a consistent User Experience across Office 365
- Integrated with Office 365 services including
  - People (user directories, collaboration)
  - Office 365 Groups
  - Microsoft Teams
  - Yammer
  - OneDrive
  - Planner
  - Power BI for dashboards
- Pre-defined governance and security groups, just add users
- Connectivity to external systems through over 450 Office 365 Connectors
- Uses standard Active Directory or Office 365 user permissions
- Role based menu structure and forms
- Syncs with Microsoft Client Outlook (tasks, calendars, contacts)
- Well documented, and with links to relevant resources (docs, video etc) in the products.
- Change look & feel, color schemes, add your own logo without coding
- Responsive UI design for mobile devices
- Support for Tablets and Smart Phones
- Integrated with other SP Marketplace workplace suite modules

## 2. TEAM COLLABORATION

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- Can be deployed with in Microsoft Teams and O365 Group sites, access from Teams or SharePoint.
- Task Tracking in SharePoint (links to Outlook) or with Microsoft Planner
- Support discussions and forums with Yammer or Teams in the Product
- Event Calendar (links to Outlook)
- Document libraries in Teams or Onedrive
- Announcements
- Group OneNote

### 3. HR HELPDESK / SERVICE REQUESTS

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- Capture cases multiple ways: End-user SharePoint portal, phone calls plus incoming email and external web form (requires optional add-on)
- Attach screen shots, documents etc.
- Role-based navigation and requests forms allow different data access for different roles
- Notifications (email) for requests receipt, assignment and completion
- View requests via computer, tablet or smart phone
- Unlimited request list view including New requests, Overdue requests, requests by Type, Category, Priority and Status. Sort, filter and group as needed.
- Auto export request data to Excel for Reporting
- Cross-reference request data with documents, tasks, and other lists
- Power BI Dashboard tracks work activity

### 4. EMPLOYEE RECORD / INFORMATION MANAGEMENT

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- Employee list to capture and manage detailed employee data
- Import base information from SharePoint User profile or other source
- Filter, and sort employee data for management analysis
- HR staff notifications (email) for any changes to Employee Data
- Store and manage employee documents in libraries
- Import/Export employee data to Excel or CSV to share with HR systems
- Hyperlink to third party HR admin tools from Employee List
- Track compliance and certifications
- Link to Training resources/ LMS for training completion

### 5. REPORTING / DASHBOARDS

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- Built in reporting for tickets/cases/service requests tracking
- Quickly view departmental metrics on a single page
- View in Power BI for very powerful, dynamic analytics with graphical interfaces

### 6. KNOWLEDGE BASE

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- Central point for Sharing information, knowledge and procedures
- Deploy for internal HR use and for end-user self service
- Cross reference with cases and common requests
- New article approval available
- Track article changes with versioning

### 7. HR EMPLOYEE PORTAL

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- Submit and Track HR Service Requests
- Knowledge base for self-service answers to questions
- HR announcements and news (can send alerts as well)
- HR Frequently used documents
- Employee Information Update (self-updating of employee information)

- Links to commonly used HR applications or benefits sites
- Permissions Driven
- Track Certifications/Training

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## 8. MANAGER FEATURES (ORGANIZATION MANAGERS)

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- Submit and approval employee changes, such as salary/Wage, Position/Department
- View Certifications of Employees in their department/oversight
- Track Performance reviews
- Submit new hire requisitions
- See applicants and track candidate
- Track employee onboarding

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## 9. BENEFITS MANAGEMENT

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- Simple benefits tracking to track multiple plans/types.
- Track employee enrollment, termination and dependents
- Report across organization, plans and departments

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## 10. HIRING AND RECRUITING

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- Create and manage open position requisitions with Approval routing for sign-off
- Capture candidate information and resumes from email, external website form (option)
- Resume/CV document library
- Set up Interviews and track via calendars
- Capture feedback from interviewers and link to candidate/requisition
- Generate Offer letter and Onboarding items
- For Managers new job requisitions, applicants database search

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## 11. EMPLOYEE ONBOARDING/OFFBOARDING

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- Create On-boarding / Off-boarding projects
- Create task list templates for various On-boarding / Off-boarding models
- Auto email notifications to task assignees
- Link any relevant documents to Onboarding Project
- Automate document process with DocuSign or Adobe Sign
- Create orientation documents etc. to distribute
- Management reports for process improvement
- Specialized Portal for New Hires to provide personal information, download and submit their assigned documents, view and check off required “first day” tasks, view and preview employee benefits.

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## 12. PERFORMANCE AND REVIEW MANAGEMENT

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- Track Performance Review dates in list
- Use your organization's preferred Appraisal forms

- Appraisal document library manages all appraisals
- Track Performance review dates, sends reminders to HR and Managers
- Manage Performance Review process and approvals
- Filter, and sort review data for management analysis

### 13. POLICY MANAGEMENT

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- Develop Policies, with versioning, reviews, and approvals
- Publish Policies to HR Employee Portal or to Doc Central in the Intranet
- Configure and manage policy groups and their staff
- Automate reminders for staff yet to acknowledge policies
- Track policy acknowledgements and cross reference with employee list

### 14. INCLUDED TOOLS

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- Dynamic Forms
  - Role based fields and tabs
  - Dynamic forms change based on selection
  - Powerful rule-based capabilities
  - Create Super Views with Virtual Lookups
- Web Parts
  - Promoted Links – Links backed by a SharePoint list, that filter and expire
  - Personnel Links – Display personalized links selected by the user
  - Announcements – Announcements that roll-up from departments
  - Organization News – a Governed alternative to SharePoint news with selected roll-up and approvals.
- Predefined Notifications using Power Automate (MS Flow)
  - New item, assigned, overdue notifications
  - Approvals for business forms
  - Update list items or external databases, even active directory
  - Create new sites and manage site permissions
  - Leverage external application connectors for ERP, Accounting and other systems
  - Capture Data from Web Forms (example applicants and CV's)
- Leverage Office 365 communications features
  - Click on a user (requester, assignee, approver etc.) to chat, talk and share screens
  - Hold online meetings with end users or customers from the portal