

## **System Demonstration**

The purpose of this demonstration is to ensure that all of our key essential requirements are met and we understand how your system will do this and what expectations there are on us to configure the system. We would like you to cover key requirements and demonstrate this within your system. The demonstration session is intended to be interactive and will be attended by our 'in house' experts for each module who will want to discuss the requirements as they are being demonstrated. We are also keen to understand the full potential of your system and how it may deliver 'over and above' our essential requirements.

You will be provided with up to 1 day to demonstrate your system and each of the core modules need to be covered. We have identified the 5 key areas as shown below; you will find a section that provides further details of what we would like to have demonstrated. Please refer to the appendices for full details of our essential requirements.

Section A – Self Service

Section B - Human Resources (including absence management / time and attendance)

Section C – Reporting

Section D – Payroll

Section E - ICT

We have the standard office facilities available for your demonstration, e.g. public Wi-Fi, screens, projector. Please let us know if you have any specific requirements.

**Section A: Self-service**

Number	Requirements	Met Y/N	Details	Score
1	Please provide an overview of the self service functionality available; we are keen to understand how intuitive and easy to use your system is.			
2	<p>Please demonstrate all the functionality available to an employee through self-service (edit and view); please ensure the following topics are covered as a minimum:</p> <ul style="list-style-type: none"> <li>- Personal information, e.g. address, contact details, bank details, ethnicity and diversity, training log, supervision and appraisal, professional registrations, continuing professional development, pay and job details</li> <li>- Inputting claims, e.g. overtime, travel and expenses. Viewing historic claim history</li> <li>- Inputting absence, e.g. absence and annual leave requests</li> <li>- Viewing pay advices and P60's</li> <li>- Multiple jobs and how this is displayed</li> <li>- Error messages if input is incorrect</li> </ul>			
3	<p>Please demonstrate all the functionality available to a manager through self-service (edit and view); please ensure the following topics are covered as a minimum:</p> <ul style="list-style-type: none"> <li>- Approval process</li> <li>- Vacation and sickness rules for approval process</li> <li>- Team information that is available</li> <li>- Appraisal and supervision</li> <li>- Alerts</li> <li>- Reports</li> </ul>			
4	Please demonstrate how the workflow process is administered; please ensure you cover the following as a minimum:			

	<ul style="list-style-type: none"> <li>- Outstanding workflows awaiting approval</li> <li>- Work flows that have errored/error messages</li> <li>- What central administration rights are available</li> <li>- How to configure the self-screens and what options are available</li> <li>-</li> </ul>			
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**Section B: Human Resources**

Number	Requirements	Met Y/N	Details	Score
1	Please demonstrate the HR module and features available.			
2	Please demonstrate case management functionality and workflow processes, triggers and alerts and reporting for HR professionals and managers. This needs to cover the following core areas: : Conduct (Grievance/Disciplinary) Capability (Grievance/Disciplinary) Absence (Disciplinary) Redeployment			
3	Please demonstrate how the system holds working hours and patterns for all employee types and for those with more than one job e.g. casual, agency workers, part time employees, as well as monitor and calculate contractual entitlements to annual/flex leave, sickness and maternity.			
4	Please demonstrate what document management process is available for HR policies (and embedded e-forms). Functionality to allow for searching, viewing, editing, creation/deletion, printing and saving to the document library based on users' credentials.			

5	Please demonstrate the types of fields available to record HR data, for example recording details of DBS checks, professional registrations. Please also cover the options available for linking certain fields to roles to ensure we capture relevant information, e.g. DBS check required for specific role, alert process to notify professional user that DBS check required.			
6	Please demonstrate the Training and CPD record functionality within your system.			
7	Please provide an overview of the supervision and appraisal process from various perspectives, e.g. employee, manager and professional user.			
8	Please demonstrate how your system maintains organisation hierarchies and how they are updated.			

### Section C: Reporting

Number	Requirements	Met Y/N	Details	Score
1	Please demonstrate the standard reports available within your system?			
2	Please demonstrate how you create, customise and share reports.			
3	Please demonstrate the reporting suite available to employees and managers within self-service.			
4	Explain how you automate data extracts for publication to end users or for interfacing with other in-house applications			
5	Demonstrate how to manually extract any data sets.			
6	Demonstrate the user dashboard. If it has a built in			

7	<p>analytics suite show fully how this would work, to include how it would present data, either on a scheduled basis or on request, in both cases using a variety of data options</p> <p>Provide full details of the system's ability to 'drill down' through data to enable close scrutiny of specific data elements in a report</p>			
8	Show fully how you create adhoc payroll exception reports, using parameters linked to net and gross pay, allowances and deductions			
9	Demonstrate how the system holds budgeted establishment information. How would you view data for 'unfilled' posts, vacancies, by grades and report against 'actuals'			
10	How dynamic are the reports and how quickly do they pick up changes to existing data sets? Demonstrate how easily the system would manage such changes, for example a change to the business structure names, to ensure consistency of reporting			

**Section D: Payroll**

<b>Number</b>	<b>Requirements</b>	<b>Met Y/N</b>	<b>Details</b>	<b>Score</b>
1	Please demonstrate the payrun process; including details of your payroll set for running multiple payruns for various employers with the same pay date, details of how your system deals with employees who have more than one job.			
2	Please demonstrate how to set up a new payrun for a new employer.			
3	Please demonstrate how your system produces statutory returns including RTI, Teachers Monthly			

4	Data Collection, Teachers Monthly Contributions Breakdown report, P11D? Examples of these reports are also required.  Please demonstrate how your system deals with backdated changes, including changes that relate to prior to cutover to the new system?			
5	Please demonstrate how your system deals with auto and re-enrolment, and pension schemes including Local Government Pension Scheme, Teachers Pension Scheme, NHS Pension Scheme & NEST?			
6	Please demonstrate how your system is configured to deal with complex calculations of salaries, allowances and deductions?			
7	Please demonstrate how your system deals with the payment of Contractual and Statutory absences together with associated processes, e.g. template letters generated as part of the process, alerts to employees and managers.			
8	Please demonstrate how costing works in your system.			
9	Please demonstrate the audit trail that is available together with details of exception reporting.			

**Section E: ICT**

Number	Requirements	Met Y/N	Details	Score
1	<ul style="list-style-type: none"> <li>•Information is open</li> <li>•Systems are interoperable</li> <li>•Data is shared</li> </ul> Your solution must conform to common established open standards for data exchange and interoperability. For example, the publishing of			

2	<p>API's/WSDLs and the consumption of external web services. Data interchange must use common open formats, XML or JSON. UK Government has selected ODF 1.2 as the standard for document formats. Proprietary formats and protocols must not be used if a service is covered by formats and protocols that are defined in an open standard.</p> <p><b>•Data is protected</b> <b>•Data is recoverable</b> Your solution must ensure data is secure and recoverable. Recovery Point Objectives must be better than a maximum of daily. Recovery Time Objectives must be no longer than 24 hours. Your solution must ensure only properly authenticated and authorised users can access data.</p>			
3	<p><b>•All browser based</b> Your solution must be delivered via standard web browsers or a platform specific app delivered from a secure app store service. It must not have additional client device dependencies or extra software that needs to be installed locally. Your solution must work, and be functionally complete, across multiple web browsers on all common operating systems. Apps must be available across all common platforms. Web access must support HTML5 and the presentation should be responsive to the type of device being used.</p>			
4	<p><b>•Accessible</b> Your solution must meet Level AA of the Web Content Accessibility Guidelines</p>			
5	<p><b>•Cloud First</b> The solution must be externally hosted.</p>			
6	<p><b>• Mobile by design</b></p>			

7	<p>Given the mobile nature of the workforce, if your solution includes a mobile app it must cope well with loss of network connectivity. It must not lose data, and must resynchronise as soon as connectivity is restored.</p> <ul style="list-style-type: none"><li>• <b>Elasticity</b></li></ul> <p>Your solution must be able to scale up and down in size and usage without bounds, with linear cost and without detrimental performance impact.</p>			
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