

HR Requirements (including time and attendance)

No.	Requirement	Essential (E) Desirable (D)	Compliant	Non compliant	A brief description of how you would meet the essential requirements
1.	System/Dashboard Set Up <ul style="list-style-type: none"> - Ability to facilitate single sign in - Browser viewable in real time across different devices e.g. desktop, tablet, laptop and mobile - Browser viewable on different operating systems e.g. Windows, Android, IOS - Easily customised e.g. for partnership branding 	E			
2.	System Access <ul style="list-style-type: none"> - Ability for access at various permission levels dependant on role / user/ multi-level security, e.g. End User Self-Service Access, Professional User Views - Ability for different types of access e.g. editing/ viewing/reporting information/application management 	E			
3.	Ability to upload existing records/existing data transfer into the system from various formats/applications: e.g. scanned paper files, digital formats, document library	E			
4.	Document management system (DMS) included within the system containing functionality to: <ul style="list-style-type: none"> - Search, Print & Save to document library - Ability to apply retention & disposal criteria to information & documentation held - DMS security dependent upon user 	E			
5.	Legislative / statutory HR updates provided and tested by the	E			

	supplier before the effective date, to include any legislative/national policy requirements specific to local government/the public sector				
6.	<p>Standard user friendly HR reports built into the system including:</p> <ul style="list-style-type: none"> - All Job data, Salary/Grade/Position - Appraisals/Supervisions/CPD - Time & attendance reporting, including Absence & Leave - All demographics, including Equal Opportunity reporting - Employee life cycle reporting, including Starters & Leavers, Turnover & Retention, Appraisals & Supervisions, Professional Registration Management and DBS checks - Structure charting, including Budget Data, Post Headcount, Grade & FTE, Positions & Vacancies, Employees, Agency/Contingent Workers and Temps - Dashboard functionality – providing a suite of changeable data to managers, e.g. absence trends, turnover, budget - Ability to show report trending (compare data over time periods) and benchmarking (show DCC standards against national standards) - Accessibility to reports based on users role permission level - Ability for reports to run at different levels e.g. by employee, team summary, organisation level 	E			Please supply a list of standard HR reports that are built into the system
7.	<p>Report wizard functionality:</p> <ul style="list-style-type: none"> - Ability to customise, create, print, archive & share reports within a users permission settings - Agility for report trending (over time) & benchmarking (against agreed standards) 	E			

	- Functionality for reports to provide summary, grouped & detailed data on any given criteria				
8.	<p>Detailed Personal Information to include:</p> <ul style="list-style-type: none"> - Name & Titles - Address, Telephone numbers & e-mail addresses - Date of birth - NI Number - Unique employee id number - Continuous service dates/LG dates/Teachers aggregated service dates/Break in Service - Person type, e.g. Contingent worker, employee, member, Agency, Apprentice - Next of kin - Equal Opportunity fields including Disability, Gender, etc. - Professional Registrations & DBS checks - Work Permit (EU nationals)/Spouses Visa, Nationality - Employee case management data, e.g. Disciplinary, Grievance, OHU referrals - CPD/Qualifications/Training Records - Absence, Leave and Flexitime records - Upload documents/attachments to personal information section <p>Agility to include further personal information</p>	E			Please supply a list of standard Personal Information fields built into the system
9.	<p>Detailed Assignment Information to include:</p> <ul style="list-style-type: none"> - Job role, description, evaluation, grade, position, location, etc. - Pension details - Standard conditions, FTE, hours of work and contract details, to include work pattern (shift, compressed hours, term time only) etc. 	E			Please supply a list of standard Assignment Information fields built into the system

	<ul style="list-style-type: none"> - Manager/supervisor - Induction, Probation, Appraisals & Supervisions - Employment Status e.g. Permanent/Temporary/Casual, etc. - Expenses & Benefits e.g. travel claims, first aid allowance etc. - Appraisals & supervisions - Ability to hold multiple assignment information for a given person - Upload documents/attachments to assignment information section <p>Agility to include further assignment information</p>				
10.	<p>Ability for HR data to be managed/updated by all users as role applicable: for example,</p> <ul style="list-style-type: none"> - Employees – change of personal details, names, contact details, next of kin, bank details, etc. - Managers – absence logging, leave approval, CPD management, reporting, etc. - HR Professional Users – Grievance, Disciplinary & Absence case management, reporting, policy updates and storing, etc. - Business support/administration – Reporting 	E			
11.	HR data and workflow processes fully integrated with payroll processes	E			
12.	Ability for the HR system/application to integrate with pre-existing systems e.g. Finest, Recruit 5, ITRIS, CRM, IMASS	E			
13.	<p>Standard HR processes built into system (with workflows) – including</p> <ul style="list-style-type: none"> - Recruitment - Appraisals/supervisions - Training/CPD incl. apprenticeship qualifications & professional registration 	E			Please add detail against the listed processes as to whether the requirement is met by your system or an add-on option. Also include details of any other processes included as standard.

	<ul style="list-style-type: none"> - Annual leave/ Flex leave/ other absences - Sickness absence incl. Occupational Health - Expenses/mileage claims - Contractual changes - Maternity / paternity/ adoption - Flexible working Requests - Agency workers/ Apprenticeships - Discipline & Grievance Processes - Leavers incl. death in service, redundancies, TUPE - Restructures - Starters incl. TUPE, DBS checks, Probation <p>Workflow process integrated with Outlook to allow for email functionality/notification</p>				
14.	<p>Workflow process wizard:</p> <ul style="list-style-type: none"> - The ability to amend the standard processes and workflows within the system, e.g. changing the standard absence process - Ability to add/initiate/create additional Devon CC specific workflows - Create task specific and summary workflows - Delegate workflow permissions based on an end users access 	E			
15.	<p>Standard alerts built into system – including:</p> <ul style="list-style-type: none"> - Contract end date, e.g. fixed term, secondment etc - Professional Registration Expiry - Overdue Appraisal/ Probation Review - DBS check - Absence triggers - Market supplement reviews - The ability to create/delete/edit alerts as required <p>Alert process integrated with Outlook to allow for email</p>	E			Please add detail against the listed alerts as to whether the requirement is met by your system or an add-on option. Also include details of any other alerts included as standard.

	functionality/notification				
16.	Alert process wizard: <ul style="list-style-type: none"> - The ability to amend the standard alerts within the system - Ability to add/initiate/create additional Devon CC specific alerts 	E			
17.	Policy documentation zone (similar to GAP): <ul style="list-style-type: none"> - Houses all HR policies, procedures & associated e-forms - Accessible by all user types, with actions set at appropriate permission levels to perform, searching, viewing, editing, creation, deletion of policies/e-forms - Functionality for auto-population of e-forms and the trigger of associated system workflow processes and system data population 	D			
18.	HR Advisor Case Management <ul style="list-style-type: none"> - HR Advisor and Manager to access and manage case information in regards to a conduct or capability issues, absence or redeployment activity, etc. - Supporting evidence can be attached, searched, edited & stored - Configurable workflow processes and alerts to complement case management in regards to disciplinary, grievance, absence, OHU referrals restructures redeployment procedures etc. - Ability for meetings to be populated in Outlook calendar if accepted (Outlook integration) - Historical information held on cases at employee level - Search previous investigations by type to help consistency, guidance and learning - Search for appropriate vacancies & training across 	E			Please add detail against the listed requirements as to whether this functionality is met by your system or an add-on option.

	<p>DCC</p> <ul style="list-style-type: none"> - Reporting functionality e.g. outcomes, reasons, complimentary trigger reports/alerts etc. - Link to Employment law, forms, policies, procedures, pensions schemes - Interactivity functionality e.g. Instant messaging, automated case updates, knowledge management building, FAQs - Ability to transfer existing data to system <p>Agility of functionality to develop further to meet business needs</p>				
19.	<p>HR Direct CRM</p> <ul style="list-style-type: none"> - Functionality specific to helpdesk needs e.g. user customer/caller & case information, call logging, filtering & recording. - Helpdesk activity integrated with casework records via associated workflow activity/triggers. - Linked to policy and e-form library, with live chat functionality - Ability to upload and store documentation for knowledge management - Reporting functionality, on helpdesk activity to provide performance statistics and graphs with ease - Ability to transfer existing data to system <p>Agility of functionality to develop further to meet business needs</p>	D			Please add detail against the listed requirements as to whether this functionality is met by your system or an add-on option.
20.	<p>Appraisal/Supervision/Probation Management</p> <ul style="list-style-type: none"> - Appraisal & Supervision forms stored within the system, with links to applicable policies, & with appropriate permissions set for users to search, view, save & edit form information 	D			Please add detail against the listed requirements as to whether this functionality is met by your system or an add-on option.

	<ul style="list-style-type: none"> - Workflow/alert processes to manage regular supervisions & appraisals & the Annual Employment Declaration Process - Workflow process to manage the probation/induction period e.g. extension, completion, etc. - Integration with other systems e.g. supervision meetings to be populated in Outlook calendar - Complimentary Reporting Functionality, at individual summary and grouped data levels <p>Agility of functionality to develop further to meet business needs</p>				
21.	<p>Training & CPD Management</p> <ul style="list-style-type: none"> - CPD records held within the system with the ability to search, upload, view, edit & attach documentation - Ability for staff to request and manage their training bookings and needs through a self service workflow process integrated with other programmes/applications e.g. Outlook calendar bookings, policy links, etc. - Training catalogue stored/editable and searchable with real time information held on course details and pre and post training materials - Workflow processes to manage course bookings and completion e.g. automation of joining instructions, certificates, course evaluation, budget charging & course cancellation processes - Links to Digital Apprenticeship Service (DAS) account and national apprenticeship training search facility, to enable the identification and management of apprenticeship qualifications training - Workflow process to manage NQSW completion of training for first year in employment - Workflow process to manage professional 	D			Please add detail against the listed requirements as to whether this functionality is met by your system or an add-on option.

	<p>registration renewal</p> <ul style="list-style-type: none"> - Complimentary Reporting Functionality, at individual summary and grouped data levels <p>Agility of functionality to develop further to meet business needs</p>				
22.	<p>Absence Management</p> <ul style="list-style-type: none"> - Ability for a user to log a sickness absence against an individual for a particular assignment (system recognition of working hours/pattern) - To include Absence Reason, Start and Estimated end dates, ability to attach Self Certifications/Doctor Letters/OHU referrals/Return to work letters etc. - Alerts to prompt managers and HR Advisors when absence triggers have been met or certification required - Ability for automatic triggers to alert managers and employees to hold return to work meetings with integration with Outlook Calendar - Access for managers, employees, administrators and HR Advisors to view and edit absence data - Full absence Reporting functionality, to include lost days to absence at person/role/ organisation level & lost time rate (%). Reasons for absence, Rates of OHU referral etc. <p>Agility of functionality to develop further to meet business needs</p>	E			Please add detail against the listed requirements as to whether this functionality is met by your system or an add-on option.
23.	<p>Time and attendance</p> <ul style="list-style-type: none"> - System to hold working hours and patterns for all - System able to monitor and calculate annual leave entitlement and availability for all employees including part-time workers, casuals, agency workers 	D			Please add detail against the listed requirements as to whether this functionality is met by your system or an add-on option.

	<p>etc.</p> <ul style="list-style-type: none"> - Ability for users to view their leave entitlement (year total & amount available), request leave and managers approve annual leave, Flex leave and unpaid leave requests. - Integration with Outlook calendars to auto-populate approved leave and view leave others are taking - Ability to monitor/log hours worked and flexi time generated with time triggers that generate time off e.g. 7.24 hours of flexi = 1 flexi day - Ability to hold and view a full history by individual of all annual leave, flex leave and unpaid leave requested (both accepted and rejected) - Reporting functionality by organisation in regards to time and attendance, allowing managers to view information by team if required <p>Agility of functionality to develop further to meet business needs</p>				
24.	<p>Job requirements and Job Evaluation</p> <ul style="list-style-type: none"> - Catalogue of all Job Descriptions, with view and edit access, import and export capabilities - Job Evaluation Library to include, job families, schemes, panels, scores, matching and relevant e-forms for completion - Workflow process to add a new job description integrated with job evaluation criteria and assessment process 	D			Please add detail against the listed requirements as to whether this functionality is met by your system or an add-on option.
25.	<p>New Starter Process</p> <ul style="list-style-type: none"> - Ability for full workflow process for new starters – fed from the recruitment system to populate the person & assignment forms, auto-generate the issues of contract, trigger alerts for appointment requirements, 	E			

	<p>e.g. DBS checks, references, signed contract returned etc.</p> <ul style="list-style-type: none"> - Workflow process to prompt managers/administrators to set up IT access, probation provisions, induction, training, smart card access etc. - Ability to Report on number of new starters by organisation/job role in a given time frame, missing appointment data etc. <p>Agility of functionality to develop further to meet business needs</p>				
26.	<p>Leaver Requirements</p> <ul style="list-style-type: none"> - Ability for full workflow process for leavers/transfers, to include, e-forms to payroll to end employment & issue applicable remuneration & documentation - Workflow process to prompt managers/administrators to remove smart card access, computer access etc. - Vacancy management workflow process - Ability to report on staff turnover, vacancies, TUPE, leaving reasons, length of service etc. 	E			
27.	<p>CRB/DBS Disclosure Management</p> <ul style="list-style-type: none"> - DBS Workflow process on recruitment of new starters ensuring satisfactory pre-employment checks & valid DBS prior to commencing role - Ability to hold documentation & evidence in regards to DBS at person level, search, archive, edit & view - Links to applicable Managing Disclosure policies, e-forms e.g. DBS2 & the DBS website, Adult First & Child Barred Lists portal. - Workflow Process for rechecking individuals in roles requiring valid DBS checks when transferring to a new position within DCC - Workflow process for rechecking an employees DBS 	E			Please add detail against the listed requirements as to whether this functionality is met by your system or an add-on option.

	<p>as a result of a break in service exceeding 3 months e.g. sickness, maternity leave etc.</p> <ul style="list-style-type: none"> - Reporting capability in regards to DBS checks performed on recruitment, transfer & rechecking. Positions requiring standard and enhanced checks etc. <p>Functionality in regards to DBS management to accommodate employees and agency workers/contractors</p>				
28.	<p>Work Structure Information</p> <p>Ability to manage all aspects of work structure information,</p> <ul style="list-style-type: none"> - Movement/deletion/insertion/transfer of organisations/ positions/jobs/grades/budgets - Workflow processes for structural maintenance e.g. alerts for broken hierarchies - Easily identifiable and non-selectable eliminated structural information e.g. positions, organisations - Reporting capability in regards to all aspects of work structure information, to include differing timeframes 	E			
39.	<p>Professional Registration Management</p> <ul style="list-style-type: none"> - Workflow process on recruitment of new starters ensuring satisfactory pre-employment checks & valid Professional Registration prior to commencing role - Ability to hold training documentation & evidence in regards to obtainment of professional registration at person level. Search, archive, edit and view - Links to a catalogue of training available to help achieve registration renewal - Links to applicable Managing Professional Registration policies, e-forms and websites e.g. HCPC. - Workflow Process for rechecking individuals in roles requiring a valid professional registration when 	E			Please add detail against the listed requirements as to whether this functionality is met by your system or an add-on option.

	<p>transferring to a new position within the organisation, or following a break in service/long period of absence from job role</p> <ul style="list-style-type: none"> - Workflow Process to complement the renewal of professional registration management with automated triggers to management/administrators and employees to begin the renewal process and update their personal details once renewal complete. To include alerts for those close to expiry - Reporting capability in regards to professional registration management e.g. dates of expiry, positions requiring professional registration etc. <p>Functionality in regards to Professional Registration management to accommodate employees and agency workers/contractors.</p>				
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