In Business for You

Workstream Description

Human Resources

Nonprofit Model 21.3

2021-11-30

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About this document

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Context

Unit4 has developed the **Nonprofit Model** (NP Model), which is the approach to deliver out of the box capabilities embedded in the software based on best practices for Nonprofit organizations. It is supported by additional database configuration, documentation and an iterative delivery model.

Workstreams

The NP Model consists of several workstreams. For each of these workstreams, documentation is available that describes the supplied capabilities. The following workstreams are available:

- Finance (mandatory)
- Budgeting
- Asset administration
- Procurement
- Sales
- Human Resources
- Payroll
- Travel & Expenses
- Project Cycle Management
- Award Management
- System Administration
- Volunteer Management

The workstreams setup is predefined based on the process scoped for the solution. In the personalization phase, the information specific from the customer is configured. Unit4 ERPx is a highly flexible and agile solution that can easily be adapted to support different system setups and processes.

Intended audience

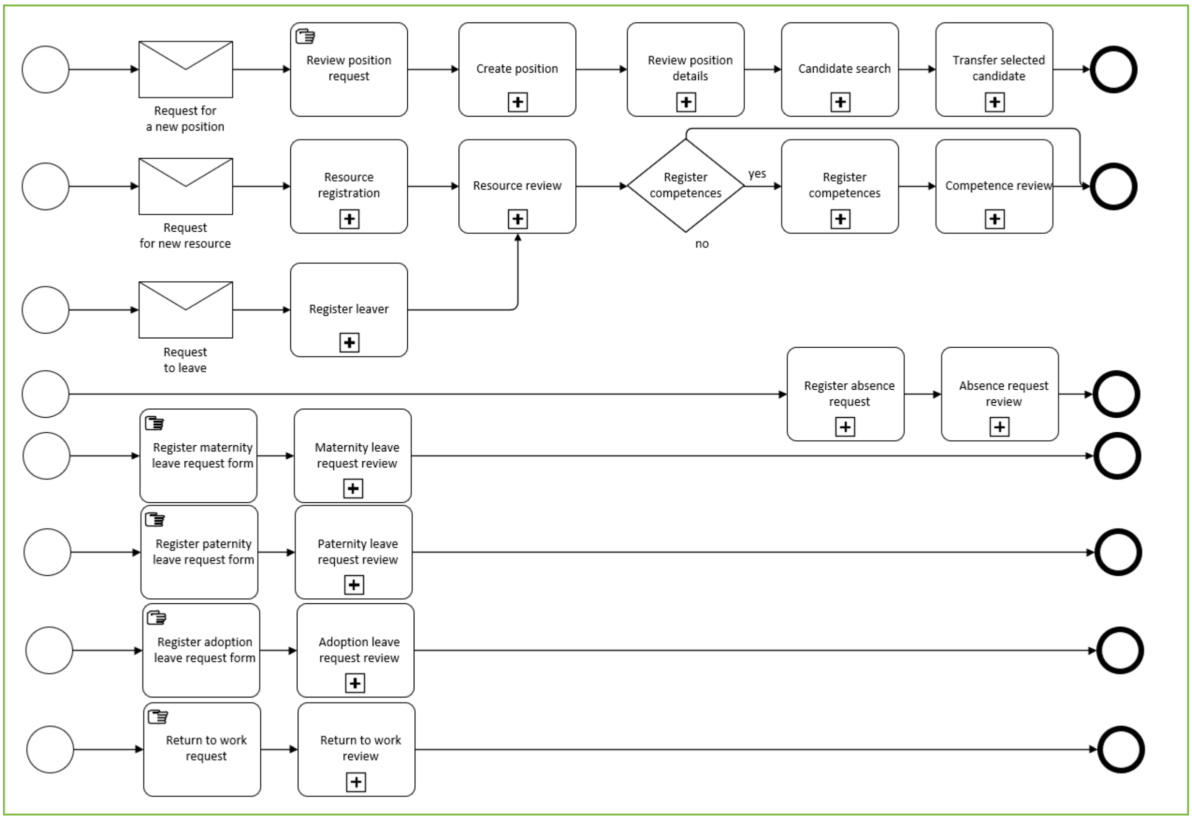
The intended audience of this documentation is members of the organization's Human Resources department who are familiar with all processes completed by the HR department from data collection to reporting. Readers are not required to know all the details of human resources processes. However, some knowledge of HR basic concepts would be advantageous for the reading of this documentation.

Contents

Human Resources

The Human Resources processes encompass all the activities involved in the resource lifecycle, from the moment the resource joins the company, throughout their employment and up to the termination of the contract. The described structures and processes are based upon the software capabilities provided with Unit4 ERPx.

The Human Resources workstream is part of the core scope of the NP Model. However, some specific processes and/or requirements are not included in the core implementation level. For those, there is a reference in the chapter that identifies it as an Addition.



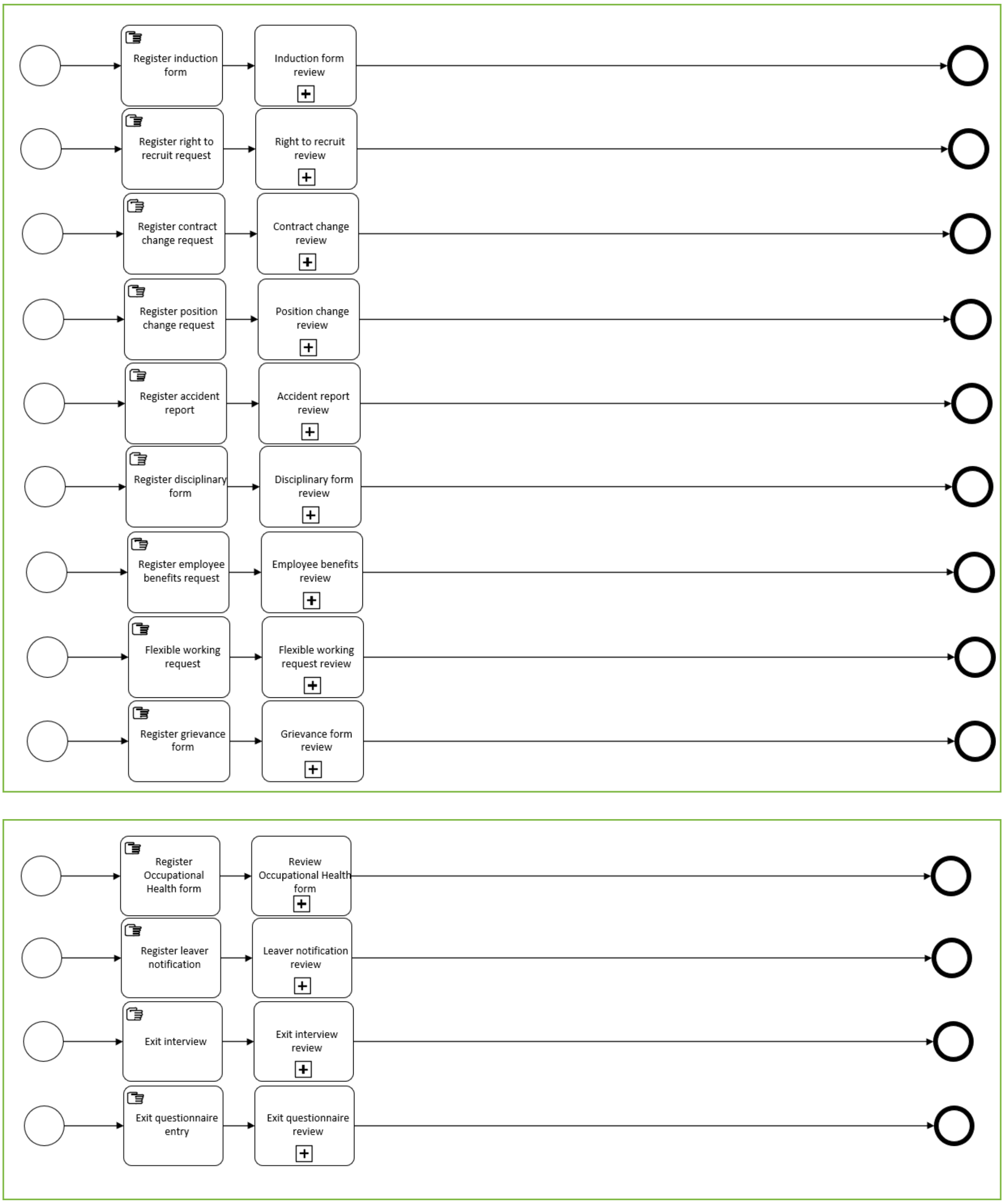


Figure 1 - Human Resources process

Organizational chart

The organizational structure represents how the different organizational units in the organizations are connected and which resources are part of these units. They visualize where resources are positioned within the company structure and are also used in workflow approvals, permissions, data access control, document access and reporting.

The structures allow searching for any resource in the structure and highlights their level within the organization. It also allows changes to the structure by dragging and dropping resources to different departments or departments to other divisions by effective date, allowing the organizational changes to be evaluated. After approval, the changes are updated automatically per effective date, keeping the history of the structural values. The structure represented in the NP Model is based on 4 hierarchical levels: Company, Division, Department, Cost center and Resource.

A second hierarchy is provided on position level where HR positions are linked to a reporting position having a 7-level structure. Each position and reporting position has a responsible resource. This can be used in position reporting.

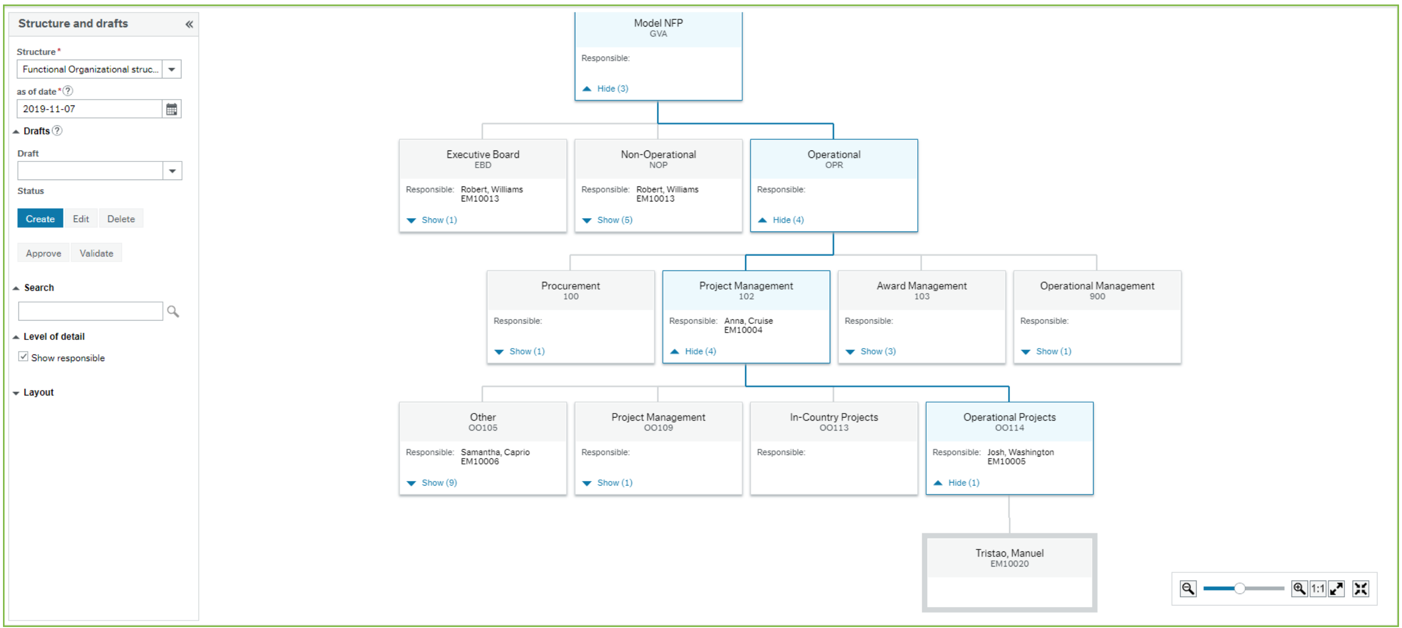


Figure 2 - Organizational chart

Position management (Addition)

Registering a new position

When a request to hire has been approved outside the solution and there is budget approval, a new position is registered. The position record contains all details about the positions available in the organizations and allows the creation of new positions. A standard set of available Nonprofit specific positions has been prepopulated. Positions are defined in job families provided out-of-the-box as well and allow the creation of a position hierarchy. Multiple resources can have the same position, and therefore the number of available positions is stored in the position register. Current resources assigned to the position are shown.

Positions			
PO30000	Human Resources Manager	PO30043	Community Outreach Specialist
PO30001	Logistics Manager	PO30044	Coordinator of Planned Giving
PO30002	Procurement Manager	PO30045	Development Coordinator
PO30003	Advocacy Director	PO30046	Development Officer
PO30004	Business Office Supervisor	PO30047	Fundraiser
PO30005	Campaign Manager	PO30048	Fundraising Coordinator
PO30006	Chief Association Executive	PO30049	Grant Administrator
PO30007	Community Health Director	PO30050	Grant/Contracts Specialist
PO30008	Community Relations Director	PO30051	Grant Coordinator
PO30009	Compliance Director	PO30052	Grant Writer
PO30010	Corporate Giving Director	PO30053	Lobbyist
PO30011	Corporate Giving Manager	PO30054	Program Assistant
PO30012	Critical Care Director	PO30055	Program Associate
PO30013	Development Director	PO30056	Program Coordinator
PO30014	Development Manager	PO30057	Social Media Coordinator
PO30015	Director of Family Shelter	PO30058	Special Events Coordinator
PO30016	Director of Major Gifts	PO30059	Recruiter
PO30017	Director of Special Initiatives	PO30060	Human Resources Officer
PO30018	Donor Relations Manager	PO30061	Volunteer Coordinator

Positions			
PO30019	Executive Director	PO30062	Case Manager
PO30020	Financial Aid Director	PO30063	Child Care Worker
PO30021	Fundraising Manager	PO30064	Child Care Specialist
PO30022	Grant Proposal Manager	PO30065	Child Support Case Officer
PO30023	Major Gift Director	PO30066	Educator
PO30024	Member Certification Manager	PO30067	Counselor
PO30025	Member Services Director	PO30069	Managed Care Coordinator
PO30026	Planned Giving Director	PO30070	Medical Social Worker
PO30027	Planning Manager	PO30071	Policy Analyst
PO30028	Program Director	PO30072	Social Worker
PO30029	Program Manager	PO30073	Aides Supervisor
PO30030	Project Manager	PO30074	Community Service Project Coordinator
PO30031	Public Relations Manager	PO30075	Compliance Coordinator
PO30032	Social Services Director	PO30076	Financial Aid Representative
PO30033	Social Work Manager	PO30077	Member Records Administrator
PO30034	Special Events Director	PO30078	Member Services Representative
PO30035	Support Services Director	PO30079	Membership Assistant
PO30036	Volunteer Director	PO30080	Administrator
PO30037	Volunteer Manager	PO30081	Internal auditor
PO30038	Volunteer Services Director	PO30082	Finance officer
PO30039	Director of IT	PO30083	Procurement officer
PO30040	Community Organizer	PO30084	Travel officer
PO30041	Community Outreach Advocate	PO30085	IT officer
PO30042	Community Outreach Coordinator		

Job families	
1	Administrative and Accounting
2	Health and Human services
3	Human Resources
4	Management
5	Marketing

The Position record provides the ability to register and track all default position information such as position type to define the type of appointment (e.g. permanent, contract) and position status. Positions get a unique number based on automatic numbering when saving.

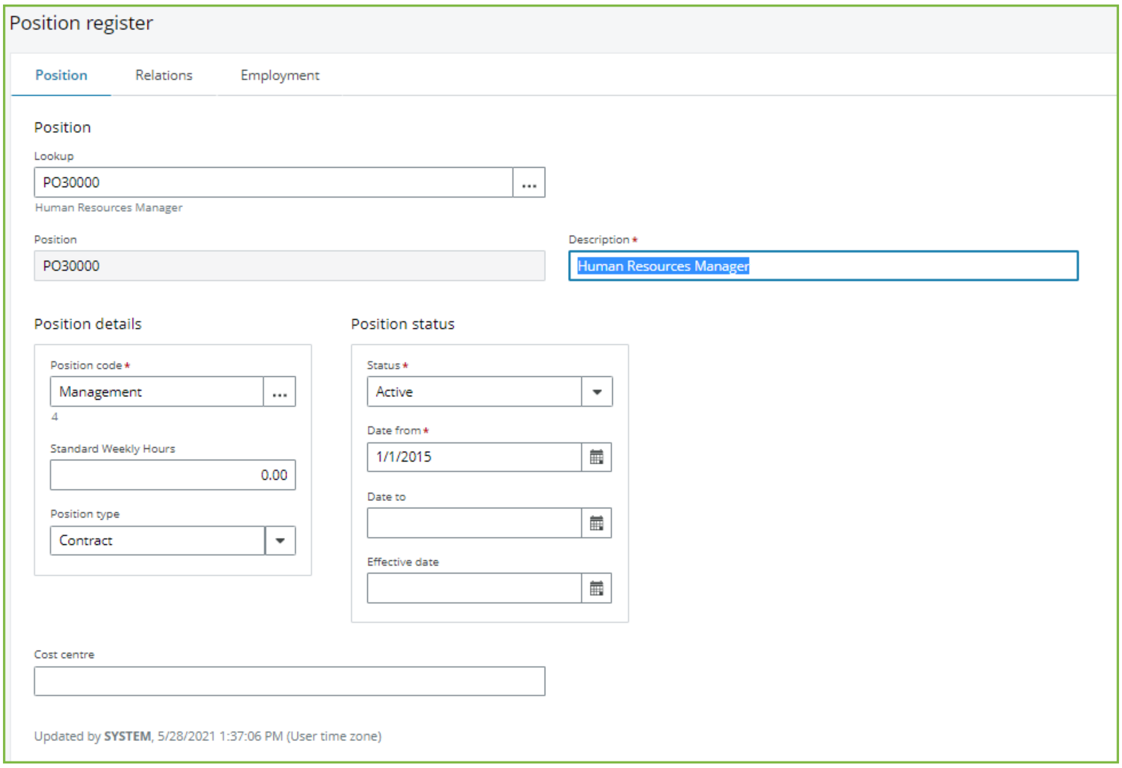


Figure 3 - Position Register

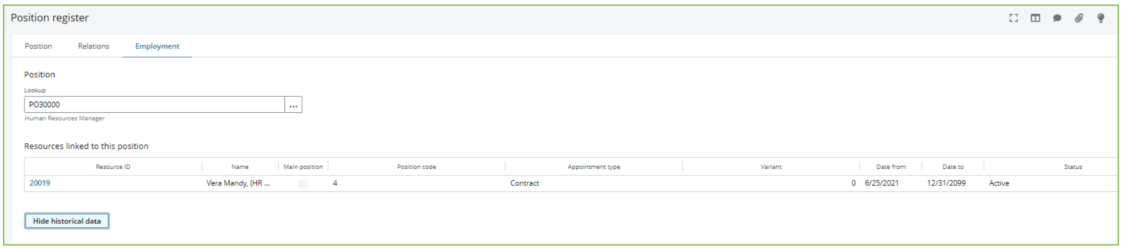


Figure 4 - Resources assigned to a position

Requirement analysis

The solution provides the ability to define the skills / competencies or requirements needed to fulfil a position. This information is used to carry out a requirement analysis on competencies, skills and completed training to find internal candidates for a position based on the requirements defined at position level. The analysis gives a matching percentage for the combination of requirements and shows the vacant position's best-suited candidates.

Position review

Created and amended position details are sent into workflow approval process to the members that are part of the workflow role for position review and approval.

Resource management

The personnel record is the 'heart' of all HR processes. It provides all information related to the resources in the organization. The record captures the registration of name, contact and address details, with additional tabs for capturing payment and bank information, employment, resource classifications, right to work, personnel documents, absence balances and payroll rates (including allowances and deductions), pension details and leavers details.

The solution provides you with an Employee Self Service (ESS), Manager Self Service (MSS) and HR staff personnel record. All three will have different permissions and access rights. For iOS users, a mobile app called Unit4 Me is offered to enquire on a limited set of personnel details and edit them.

Within the ESS personnel record, you can only see and amend your own Personnel information. It shows the main groups of information and document types an individual resource is permitted to see, and only a limited set of fields is available for amendment (e.g. bank account, address or emergency contact changes). Changes made are sent in a workflow for approval.

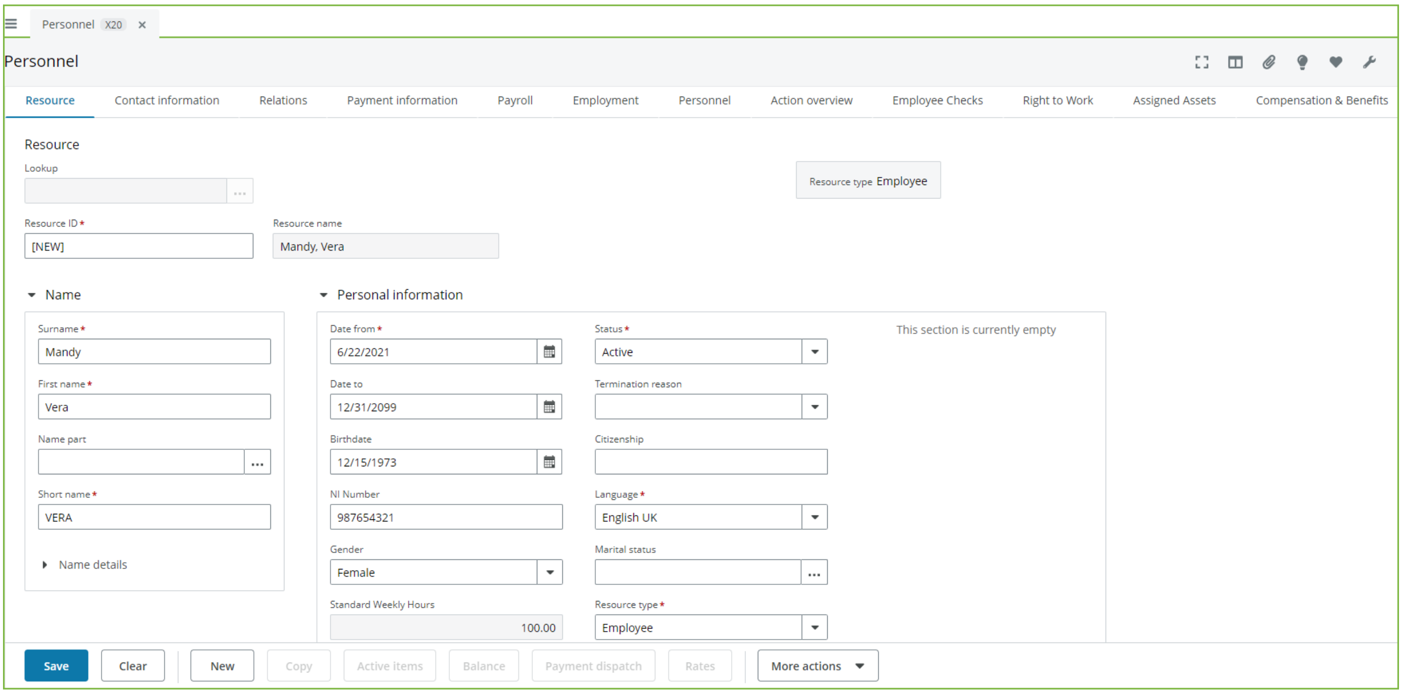


Figure 5 - Personnel information (MSS)

Within the MSS an extended personnel record is available for all my resources as a manager, which provides the personnel details of all the team members within the team of the manager. The MSS has extended groups of information and more documents types available. The manager can change more fields than an individual resource.

A third personnel record is available for the HR department which allows for retrieving personnel details of all resources in the solution. This record shows all groups of personnel information and all document types. The HR department may change all personnel fields, as determined by their role.

Although there are 3 different entries to retrieve personnel information, the details itself are stored in a single source. The difference between ESS, MSS and HR department are the permissions set to retrieve and amend the personnel data.

Employee workspace

An employee workspace is provided with all required KPIs and metrics relevant for the employee and links to the most common activities an employee needs access to. It contains information on the personnel details, absences, activities as procurement and travel expenses, timesheets and development. Tasks and associated personnel documents are available.

Additional metrics and KPIs are displayed in several dashboards:

- Personnel and employment details
- Seniority in the organization
- Active years in current position
- Contract / Working hours
- Passport and VISA expiration in days
- Number of sick and leave days, leave entitlements and raised absence per category
- Entered travel transactions (claims, per diems) with paid and unpaid expense overview
- Open purchase requests and purchase orders raised by the employee
- Insight in entered timesheets (draft hours, hours pending approval, external versus internal project hours and overtime hours)
- Current years entered timesheet details and processed time transactions
- Assigned courses and completed courses as well as course signup widget

Links are available to following activities:

- Personnel details of the current employee
- Entry of substitutes for workflow approval (out of office assistant)
- Your profile with employees' preferences on alerts and email
- Personnel files in document archive
- Task management for employee's workflow tasks
- Absence request forms for adoption, paternity and maternity leave, as well return to work form
- Detailed leave entitlements
- Calendar with personal work schedule
- Purchasing and expenses to enter travel request, expense claims, purchase request and view of employee's purchases

- Timesheet entry
- Overview of competences of the employee as well as competence entry and maintenance

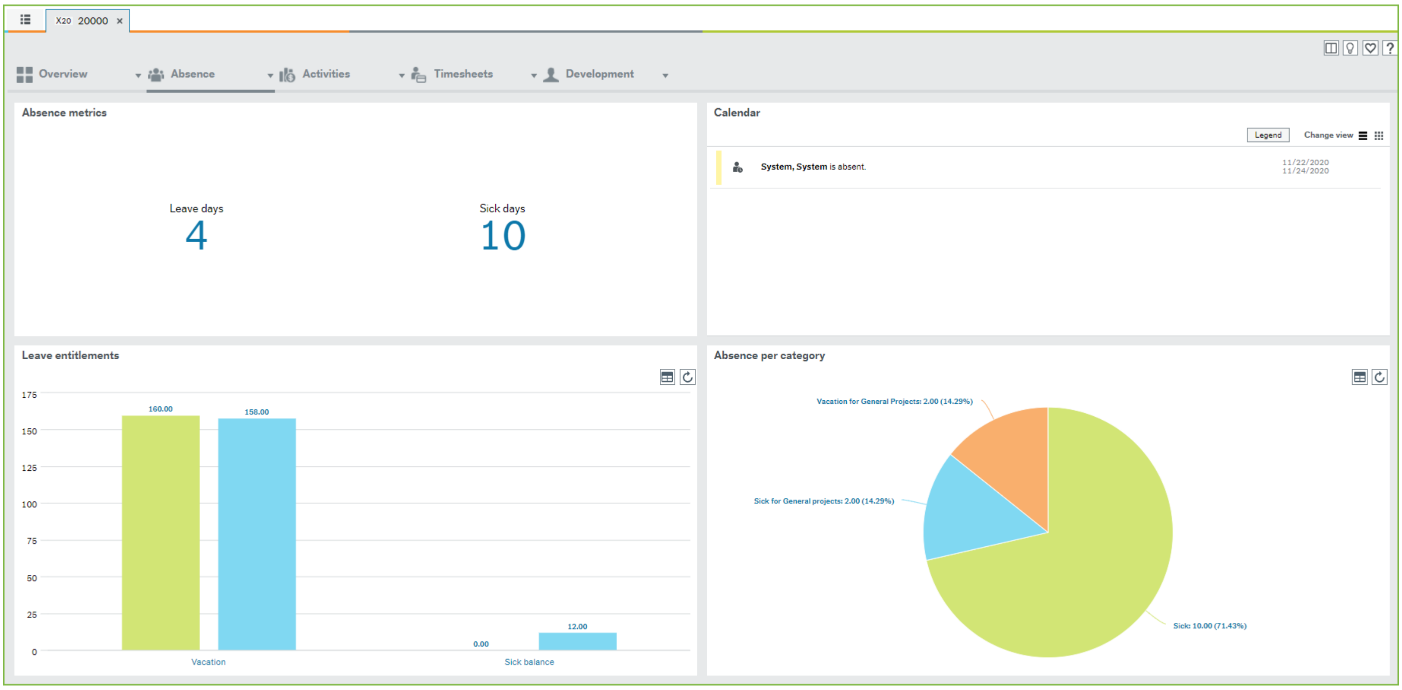


Figure 6 - Employee workspace, absences

Registering a new resource

A resource is registered and maintained in the Personnel window. The entry is either created automatically based on a candidate being hired as result of the recruitment process or is manually entered. Multiple tabs are provided for grouping of the personnel details. New resources are automatically numbered with a unique ID. To avoid double entry of resources the Social Security or National Insurance (NI) number is checked against all existing resource records.

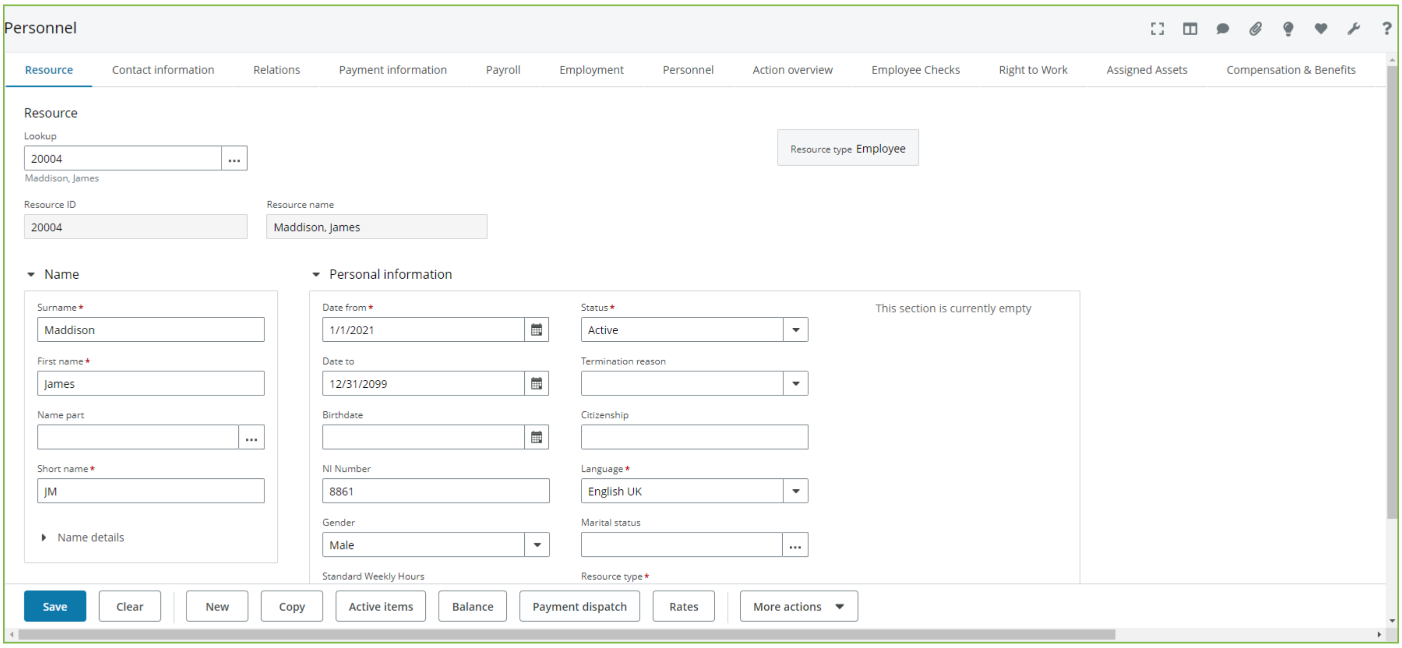


Figure 7 - Personnel window for HR users

The following tabs are provided:

- **Resource**: General details of the employee including name details, start and end date, citizenship and resource type.
- **Contact information**: Address details (multiple address types are provided) and next of kin information. A General work address and a Home address type are provided.
- **Relations**: Classification of the employee to relate the resources reporting structures and hierarchies (e.g. relation to cost center, work schedule). Relations are also essential for linking to the Payroll model, where this module is in scope.
- **Payment information**: Payment information of the employee containing bank account details and payment method.
- **Payroll**: Displaying the Payroll specific details, e.g. tax and NI classification and a display of any rates associated with the employee.
- **Employment**: Connection between the employee and a position. It contains the employment(s) and linked position(s) and details per employment.
- **Employee checks**: Allows the registration and maintenance of employee´s information such as qualifications, security clearance and references.

- **Right to work**: Comprises information regarding the employee's permits (VISA; Work; Residence).
- **Assigned assets**: Overview of assigned assets and details to the employee (e.g. laptop, car, mobile).
- **Compensation and benefits**: Registration of the benefits to which the beneficiaries of the employees are entitled. The employee´s pension plans can also be defined.
- **Contract management**: Records any additional contractual information such as probation period and status, contract review details, appraisal dates and status.
- **Leaver management**: Registration of all leaver details such as leaving date and reason, exit interview details and leaver tasks.

Resource type

The resource type allows to group resources into different categories for reporting. For timesheets, the resource type is used to define the cost analysis of the resource and to specify the cost rates used per type. The following resource types are provided:

Resource type	Description
Employee	Category for own staff employees to be grouped.
Volunteer	Category to group volunteers that need to record time and expenses and might be assigned to planned tasks. See also the Volunteer management workstream
Contractor	Category for contractors hired by the organization to deliver services and which are not on the payroll

Grouping of resources using relations

As mentioned previously, the relations tab contains the classification and grouping of resources for reporting purposes and for hierarchical reporting. All these relations are date-specific, and a history is kept in this way. The solution supports reporting on the grouping and structures based on any effective date, past, present or future. The following grouping levels are provided:

Groups	Type	Description
Human Resources	Resource type	Type of resource as referred to in the section on 'Resource type'.
	Course instructors	Reference to the training administration to define whether this resource is an instructor/trainer.
Project	Work schedule	The individual work schedule of the resource.
	Cost category and Income category	The cost category and income category of the resource.
Hierarchical structure	Cost center	Department the resource belongs to.
	Legal entity	Allows you to specify the company for which the resource works.
Payroll	See detail in Payroll workstream description	

UNIT4

Employment

The Employment tab defines the position the resource is holding. Connecting a position to a resource, enables all previously defined position information to be defaulted to the employment level and to be adapted to the specific details of the resource. The positions available are defined in the Position register. For more information refer to Position management (Addition) on page 9.

Data element	Description
Position	Links the position to a reporting position and position hierarchy optionally to be used in workflow approvals
Cost center	Links the position to a cost center
Location	Links the position to the office/work location
Payroll labels	Go to Payroll workstream description for more information

Personnel documents

This solution offers the possibility to attach documents to a resource. Several document folders are provided, each with their own permissions. The following document folders are provided:

Document types	Access
Compensation & benefits documents	HR department, Resources, Cost center responsible
Contract management	HR department, Cost center responsible
Leave management	HR department, Cost center responsible
Right to work documents	HR department, Resources, Cost center responsible
Employee checks	HR department, Resources, Cost center responsible
Employee picture	Available to resources
Resource documents	HR department, Resources, Cost center responsible
Grievances	HR department, Resources

Work schedule

To enter absences and timesheets, every individual resource needs a work schedule. This specifies when a resource should be at work, allowing to calculate the work availability for any period. Work schedules are based on workdays and non-working days with several working hours. The work schedule week starts on Monday and can be tailored with the national and/or company holiday plan, reflecting specific bank holidays.

The resource is linked to an existing work schedule, which generates the fiscal year's working calendar. The solution provides a standard work schedule.

Work schedule	Description
STD	Standard 40 hours work week based on 5 working days of 8 hours each and 2 weekend days of 0 working hours each

The predefined work schedules won't provide the exact number of work schedules needed but provides a starting point. They can be easily amended and expanded to comply to the requirements and normal daily working hours in your organization. During the implementation, part of data collection is the gathering of all work schedule variants to capture part-time working.

Resource details review

Amendments done to the resource record are sent into a workflow for review to the members of the workflow role of the HR department. The fields that trigger this review process are:

Field	Description
Name details	Title, Middle name, Maiden name
Address details	Address, zip code, place, telephone, email
Other details	Marital status
Next of kin details	Name, relationship, type of next of kin
Financial details	Bank account information

Cost center manager workspace

An out-of-the-box portfolio of cost centers and associated workspace is provided. This contains the portfolio of all cost centers a budget holder/cost center manager is eligible to. The cost center portfolio displays an overview of all cost centers, including main details.

From the portfolio, by zooming into a specific cost center's workspace, you access an overview of cost center details, financials, employee and HR data, absences and compliance information. It includes the workflow tasks and associated documents for the chosen cost center.

These metrics are provided:

- Budget comparison per account segment comparing the initial budget, revised budget and actuals with forecast data
- The variance of actuals with the initial budget, revised budget and forecast
- Overview of financials per account class and drill down to detail on account level
- HR metrics: average age, average seniority, duration in current and all positions for the team
- Calendar with upcoming events
- Resource details

- Absence info with current absence, absence per day of the week, long term versus short term absence, absence incidents and absence on Mondays and Fridays
- Compliance with age diversity, gender diversity and resource type analysis
- Starters & leavers: starters and leavers in the last 30 days, reasons for leave analysis

Links are available to the following activities:

- Cost center record with all details
- Initial, revised budget and forecast entry
- Employee details
- Starters and leavers dashboard
- Absence info dashboard
- VISA details and expiration dates

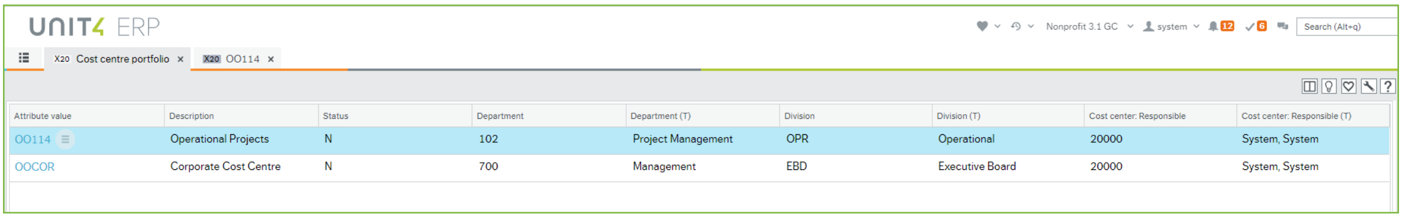


Figure 8 - Cost center portfolio

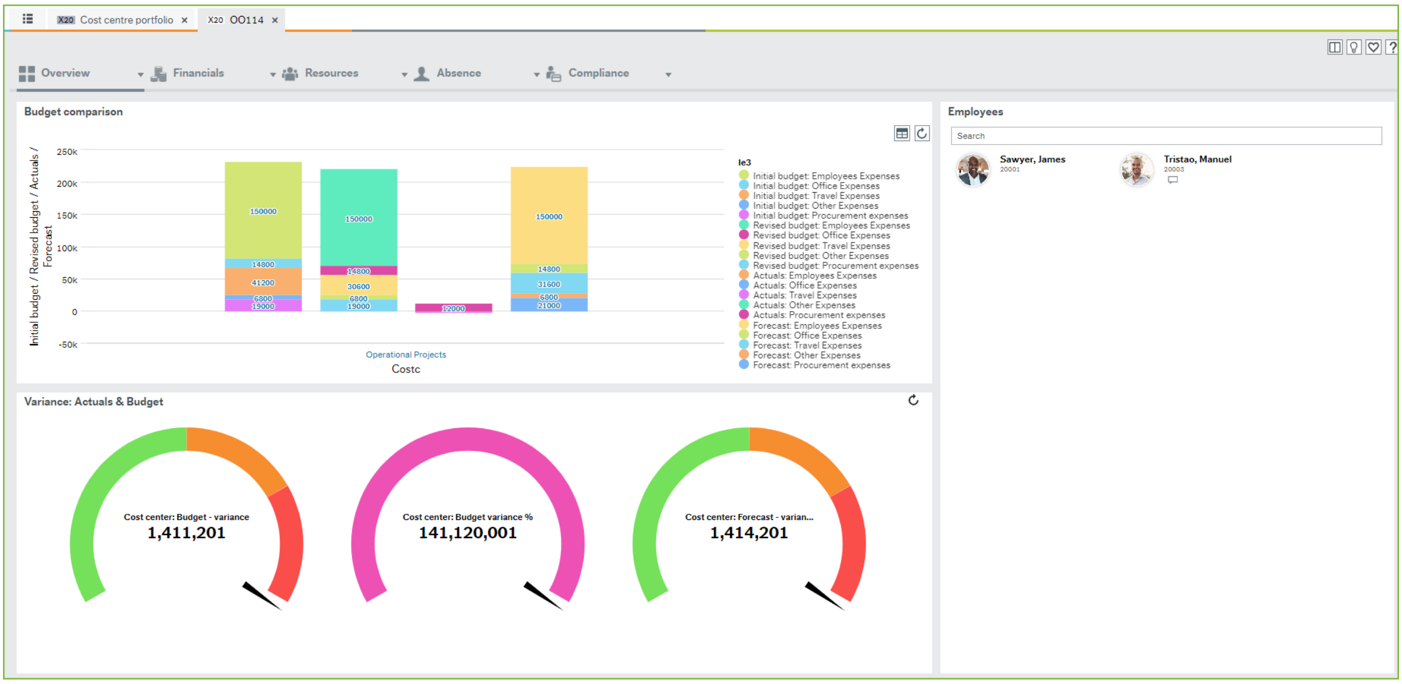


Figure 9 - Cost center portfolio, financial metrics

HR workspace

An HR portfolio is provided for employees in the HR team with all required KPIs and metrics relevant across all employees in their associated company and links to the most common activities the HR team needs access to. It contains information on people, organization, absences and compliance.

Additional metrics and KPIs are displayed in several dashboards:

- Total headcount per division with drill down to department, cost center, position and resource level
- Headcount metrics with a total headcount, starters and leavers
- Staff turnover percentage
- Position breakdown with drill down from job family to position level
- Total number of active and vacant positions and staff turnover
- New positions in the last 30 days
- Cost of absence over time and cost of absence year to date
- Loss rate over time, loss rate percentage, one-day absences total and people absent today
- Gender analysis, resource type analysis and age analysis
- Average age, average seniority, average duration in current post, average duration of all positions
- Starters and leavers; staff turnover per cost center, leavers reason analysis, starters and leavers in last 30 days
- Absence analysis with current absences, sickness reason analysis and absence breakdown per type
- Days lost analysis with days and hours lost, short versus long term sickness and incidents & number of days
- Detailed overview of all absences registered

Links are available to the following activities:

- Employees search to find any employee in the organization
- Starters and leavers dashboard with additional information
- HR structure (position reporting structure)
- Position register to maintain and add positions
- Organization structure (line reporting and approval structure)
- Right to recruit form
- Employee contract change form
- Absence analysis with days lost analysis and absence incidents
- Bradford factor
- New absence entry

• Occupational health form
• Employee VISA details and expiry dates
• GDPR anonymization process for employees, documents and additional information
• Disciplinary and Grievance forms

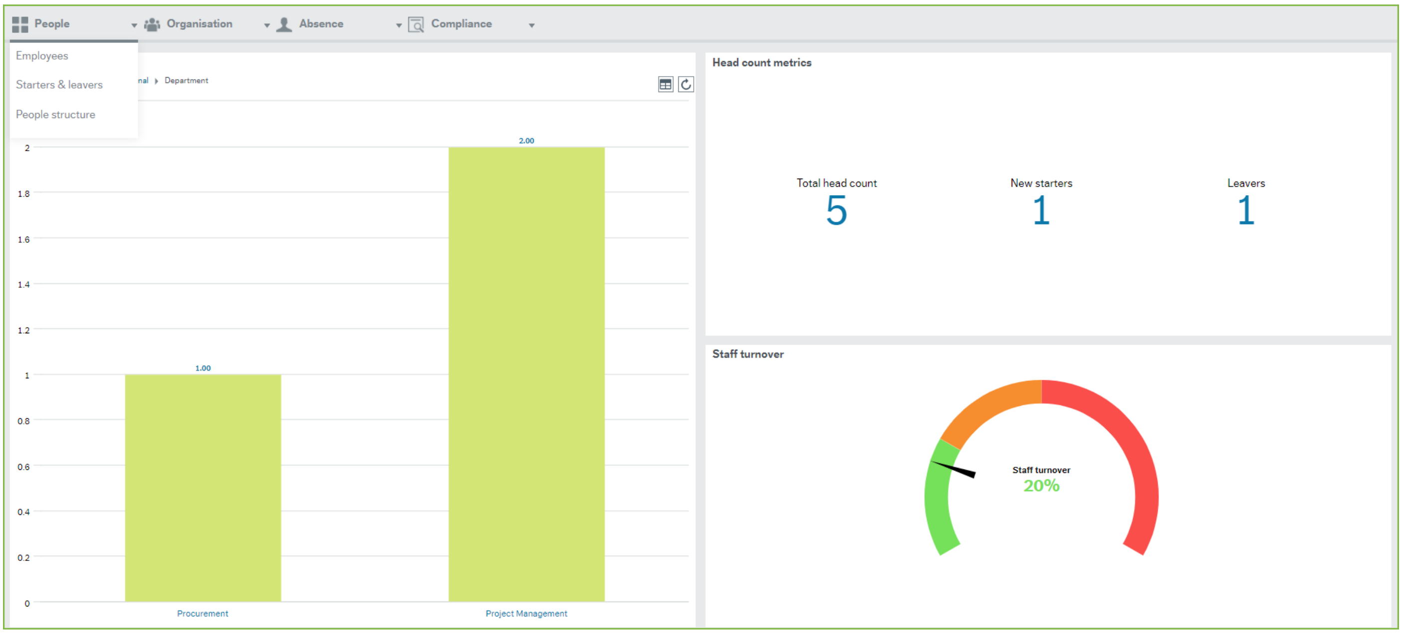


Figure 10 - HR workspace, employee tab

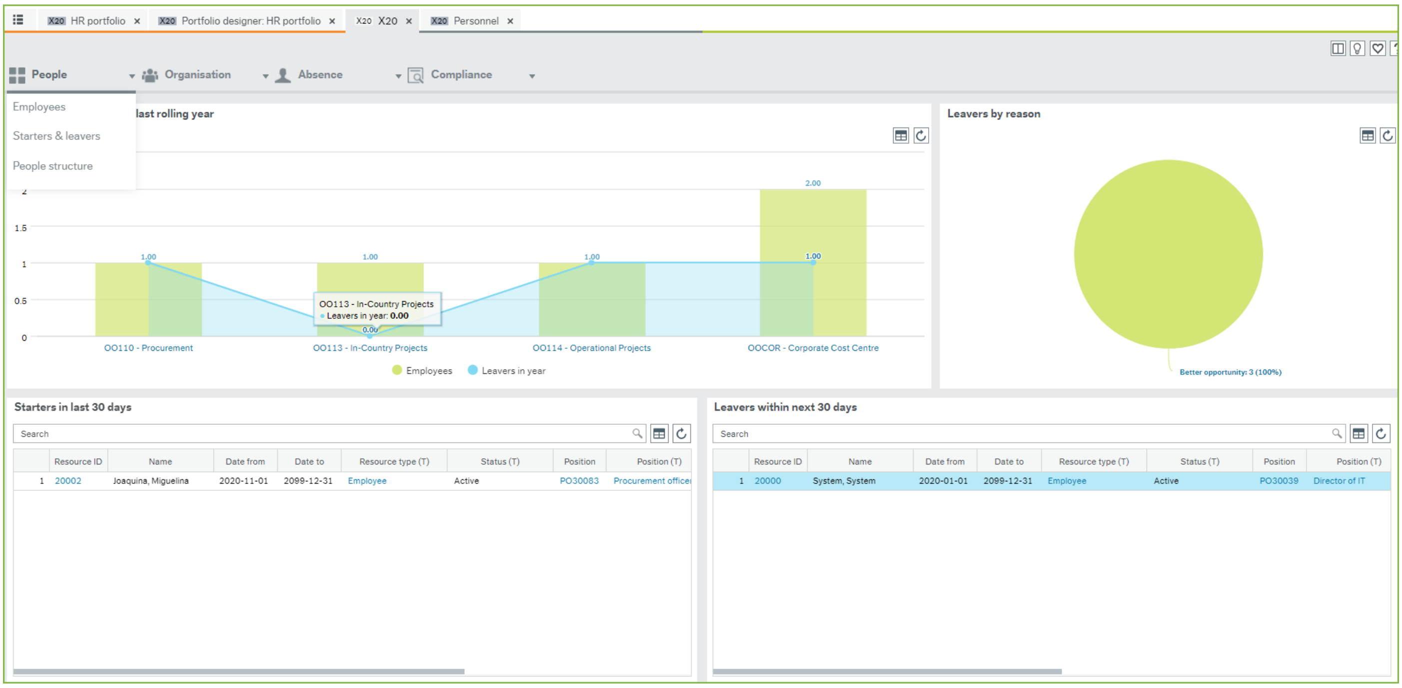


Figure 11 - HR workspace, starters and leavers tab

HR forms (Addition)

The HR workstream provides a comprehensive set of HR-related forms for specific purposes and different types of users, from employees to managers and the HR team. The HR forms assume that positions and employments of resources are captured in Unit4.

Every form offers to store documents against it in a separate document folder, displayed within the workflow review process. Forms are available in the menu either to the manager only or for all employees using menu access control.

The following forms are delivered out of the box.

Absence

- Adoption leave request: request for long term absence due to adoption of a child, entered by employee and subject to review by manager and HR team in workflow
- Maternity leave request: to request for long term absence due to maternity leave, entered by employee and subject to review by manager and HR team in workflow
- Paternity leave request: to request for long term absence due to paternity leave, entered by employee and subject to review by manager and HR team in workflow
- Return to work form: to capture information about return to work after a long-term absence, entered by employee and subject to review by manager and HR team in workflow

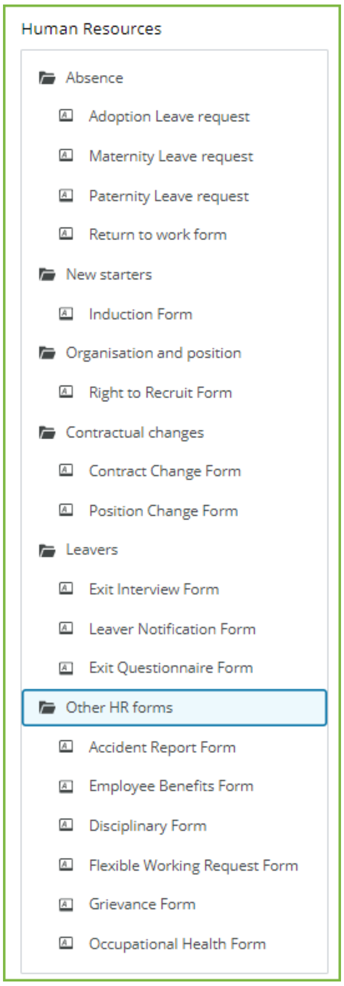


Figure 12 - HR forms

New starters

- Induction form: form to define induction activities required for new employees. Entered by employee's manager and subject to review by HR team in a workflow.

Organization & position

- Right to recruit form: vacancy request form with recruitment details for new and existing positions, entered by managers with workflow review by HR team.

Contractual changes

- Contract change form: request for change of contractual details, entered by the employee's manager with workflow review by the HR team. Contractual changes include additional payment, change in hours, change of contract type, change of work schedule, change in working weeks, extend fixed term dates and additional increment.
- Position change form: request for changes to the employment by the employee's manager with workflow review by the finance department and HR team. It supports requests for new positions, as well as changes to existing positions and closing of positions. Changes supported: change of budget hours, change of contract type, change of cost center, change of end date, change of headcount, change of location, change of job family, change of position title and change of reporting position.

Leavers

- Leavers notification form: employees notification of intention of leaving the organization with workflow review by employees' manager and the HR team
- Exit interview form: manager form for capturing exit interview details with the employee with workflow review by the HR team
- Exit questionnaire form: exit questionnaire for employees, entered by the employee with workflow review by the HR team

Other HR forms

- Accident report form: report of an accident or injury by the employee with workflow review by the HR team; employees can report incidents in this form that include colleagues
- Employee benefits form: request for additional benefits by the employee with workflow review by the HR team
- Disciplinary form: capturing of disciplinary cases by the manager with workflow review by HR and the employee
- Flexible working request form: request form for employees for flexible working with review by the manager and the HR team
- Grievance form: form to capture grievance details with workflow review by the HR team
- Occupational health form: employees' referral and medical details on work-related absence with workflow review by the manager and the HR team

UNIT4

Absence management (Addition)

The Absence process encompasses the activities involved in the requesting, recording, and reporting of absences for resources. This solution offers the possibility to register resource's absences, whether they are absences that already occurred – unplanned absences - or future ones – planned absences.

Resources enter absences such as holiday/vacation request, sickness, which are subject to their manager's approval. When an absence is registered the current absence balances are shown (e.g. number of days of leave, overtime balance). The list of absences provided in the solution are:

Absence types	Description
Sick	Sick is used when employees are unable to perform employment duties because of sickness, disability or injury.
Vacation / Holiday	The vacation code is the one used for Annual leave. This type of absence is linked to a holiday balance that allows to indicate exactly the number of days the employees are entitled to. As employees use vacation days, the balance is deducted accordingly.

This list is a predefined list, which can be tailored to the local regulations and requirements, since the type of absences and the legislation differs per country.

Absence request

A launching page is provided for absence entry and retrieval showing all current absence balances and allows the resource to enter a request, but also to find the status of pending absence requests. The submitted absence requests are sent for approval by the resource's manager. According to the type of absence (e.g. vacation) a validation takes place against the available absence balances which shows a warning when exceeding it. This is shown to both user during entry and manager during approval. The calculation of the number of absent hours or days is based on the resource's individual work schedule, which contains the normal working hours.

In case of absence due to Sickness an open absence request is used, where the resource enters the expected end date. This type of absence requires an absence reason from the resource. Adding documents such as sick / fit notes to the absence request is provided.

The solution supports two scenarios for absence allocation:

1. Absence entry on an internal project, with the allocation of the absence hours and cost for internal reporting only
2. Absence entry on an operational project, with the allocation of the absence hours and cost to a donor-funded project with external donor reporting purpose.

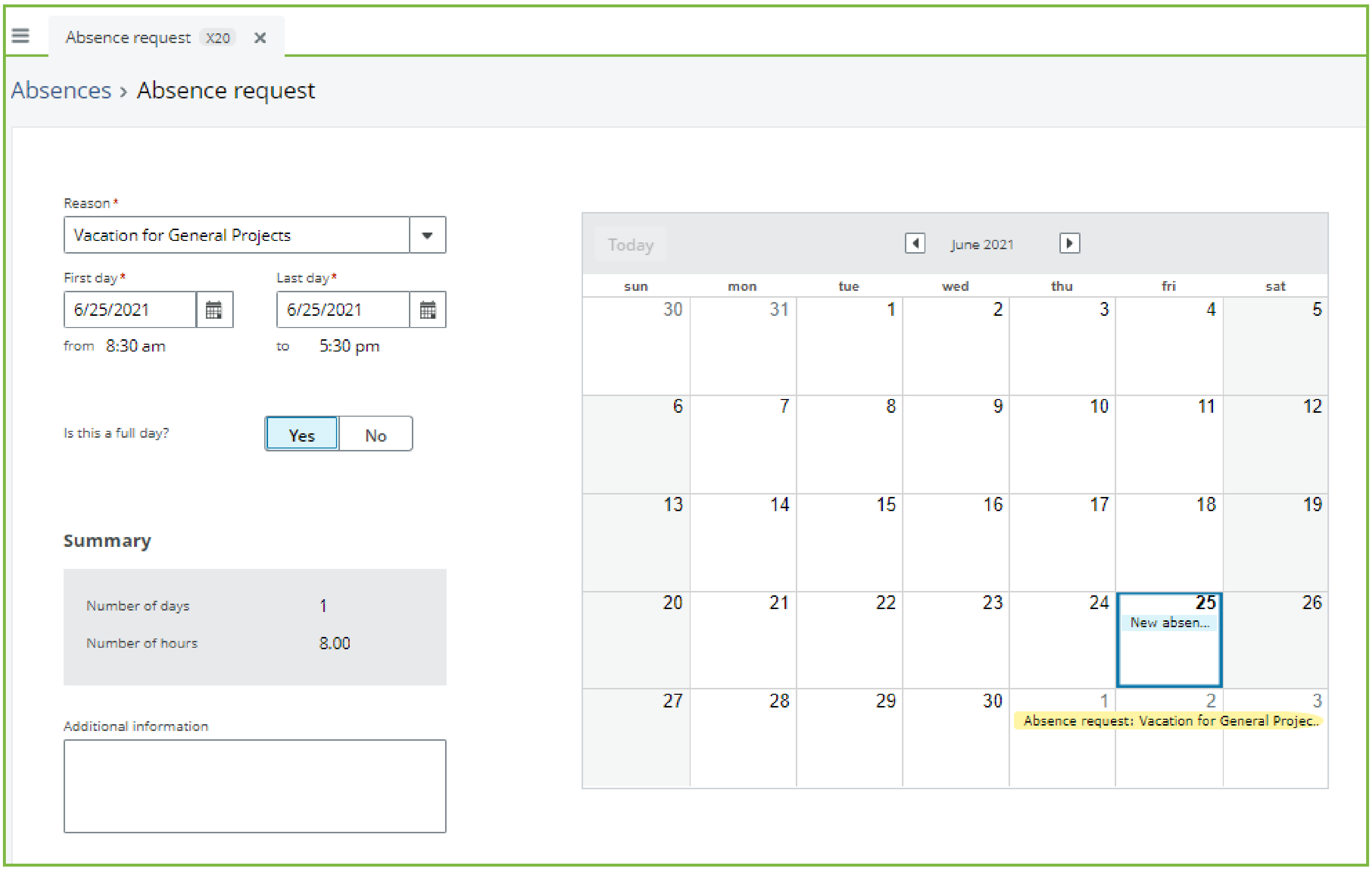


Figure 13 - Absence request entry

Absence review

Absence requests submitted are sent for approval in workflow and must be reviewed by the resource's manager.

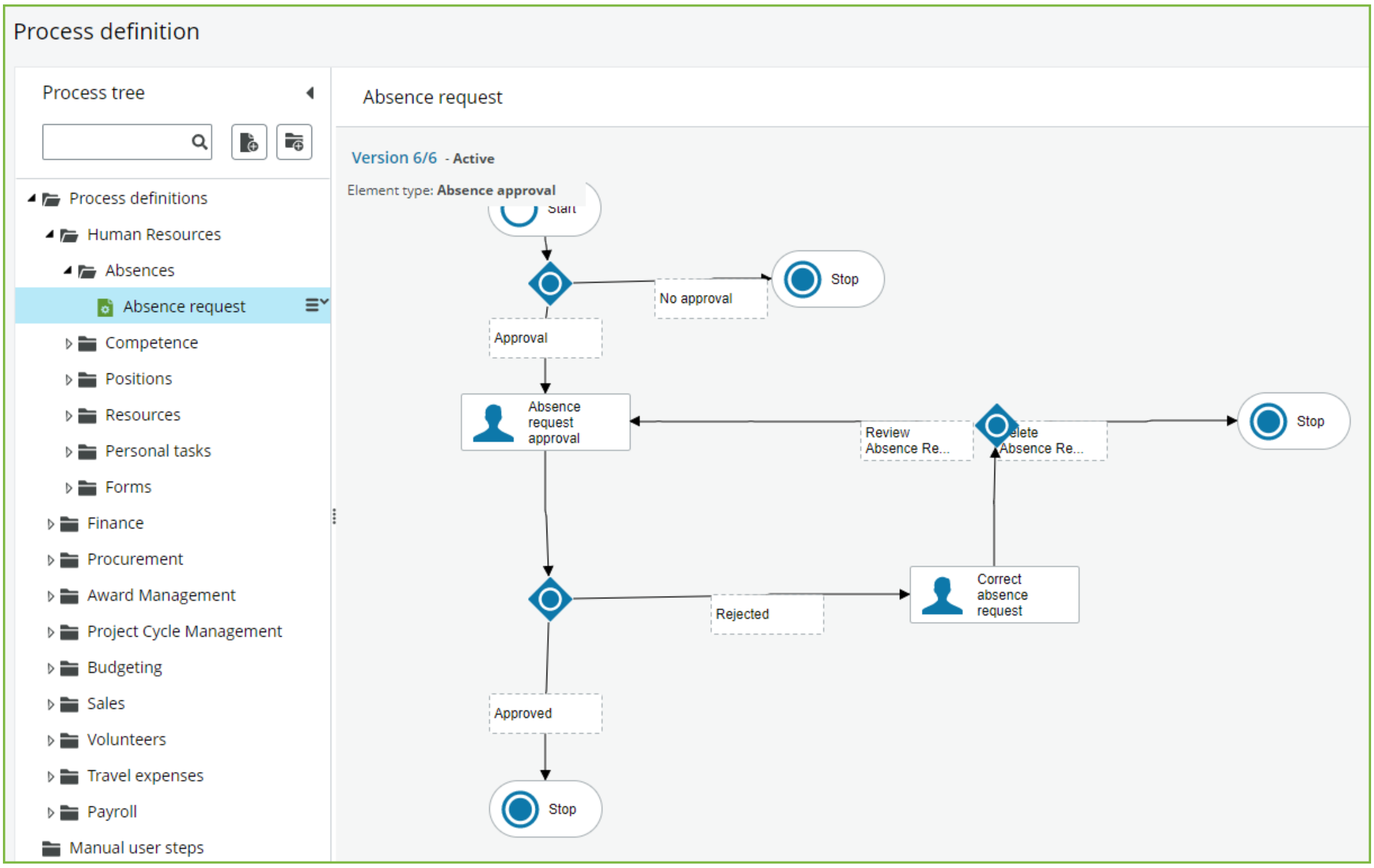


Figure 14 - Absence review process

UNIT4

Competence Management (Addition)

Competence management enables organizations to evaluate the resource capabilities based on their competencies and skills. A competence library with unlimited number of levels and competences can be defined, including registration of soft and hard skills. The competence definition process allows the registration of a set of skills, knowledge, abilities, experience, that enable a resource to perform effectively in their job.

The competences and skills are used in several other process, for instance in assigning resources to a project, requirement analysis on available skills, analysis of training needs and for analysis of skills for vacant internal positions to find suitable candidates.

Competence registration

The solution provides the definition of distinct competence types. Each type includes a definition and may have a level of competence associated. The competences which have levels are the ones that are updated and improved through training. This solution has the following predefined competence types:

Competence types	Description
Leaders competencies	This competence type enables resources to be evaluated for leadership skills and behaviors.
Educational Qualification	Educational qualifications are the degrees, diplomas, certificates, professional titles and so forth that a resource has acquired.
Professional Qualification	Professional qualifications represent the resource's vocational qualifications. This competence type purpose is to help the resource improve and develop relevant skills for a career path.
Job Competencies	This type refers to the skills or areas of knowledge needed by resources within a specific field of work.
Personal Competencies	Allows for indicating the level of personal competence such as Self-Awareness (Emotional self-awareness; Accurate self-assessment and Self-confidence) and Self-Management.
Technical Competencies	This type refers to the technical skills that resources have.
Language	The language competence type allows the definition of all linguistic or grammatical competencies of the resources.
Professional Institute	This type allows the definition of institutes which resources have attended to develop their skills.
Social Competence	Social competence refers to the set of social skills necessary to interact positively and get along well with others.
Law Competence	It allows defining the resource’s level of legislative knowledge.

Every competence type has several competencies belonging to it, either to capture soft and hard competencies. For hard competencies, a Self Service for resources is provided to maintain their competencies and skills and is sent for review after submission. An overview of competencies per resource is provided to the resource and the maintenance screen to add and update competencies. HR staff can amend and enter competencies on behalf of resources themselves as well.

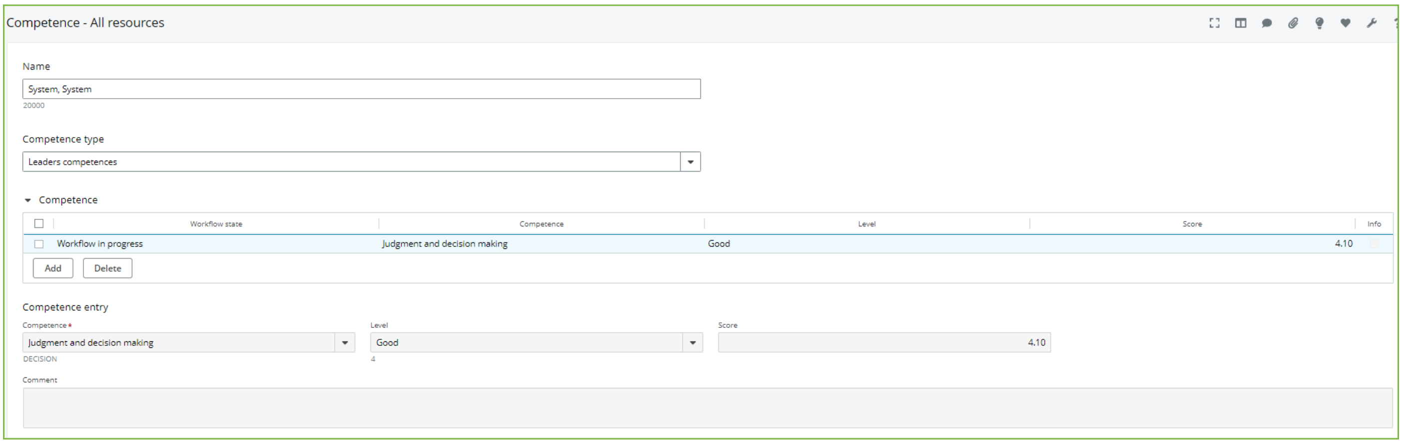


Figure 15 - Competences overview and entry

Competence review

The review process for competencies sends a workflow task to the HR department for approval (users within the HR department workflow role).

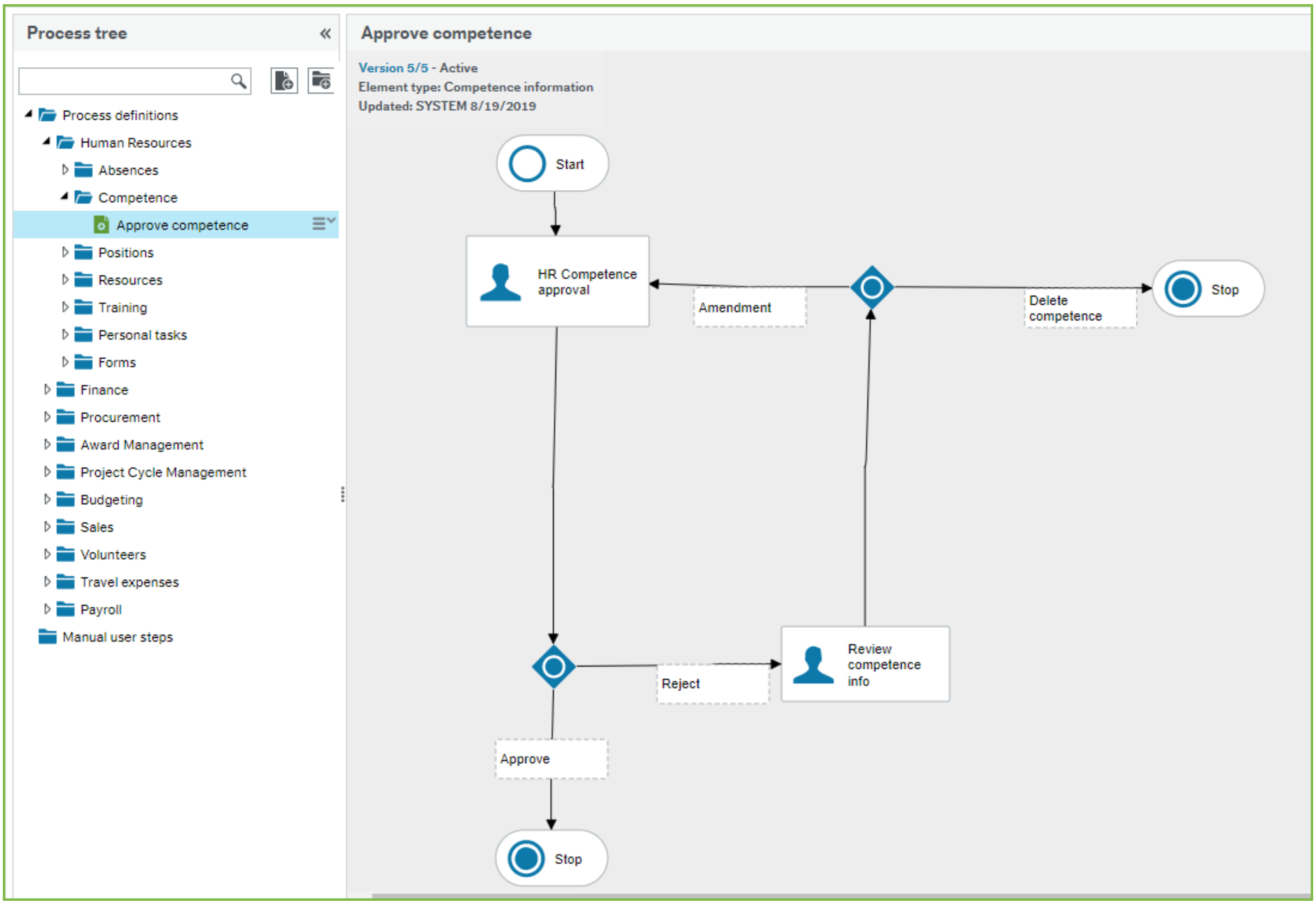


Figure 16 - Competence review process

Training Management (Addition)

The training management process offers the capability to register and manage internal training courses.

Training management allows the HR department to:

- Set up courses, course details and schedule courses
- Manage the participants list
- Indicate the course instructors by filling a relation on Personnel Masterfile (COURSINS)
- Create course packages

The individual can:

- Sign-up for courses via course scheduler (eligible courses will show a green check while the others will show an orange hand)

> **NOTE:**
> The training request follows an approval process. If rejected, the individual should close the request. The individuals can also join the waiting list, if that option is available.

To avoid double entry and ease the maintenance of the course administration, a course setup is provided in which the course details, its link to competencies, equipment required, and prerequisites are defined only once.

This course information can then be used to schedule individual instances. As the training management process integrates with the competence management processes, the newly gained skill is automatically updated in an individual's competencies register once they have completed the course.

Course setup

This is where general information about the course is defined. It is possible to add:

- facilities
- number of participants (minimum and maximum allowed to enroll)
- course information
- the equipment needed
- prerequisites to sign up for this course (e.g. other courses to be completed before you can sign-up
- competence(s) and skills to be updated when a course is completed
- any courses related to this course

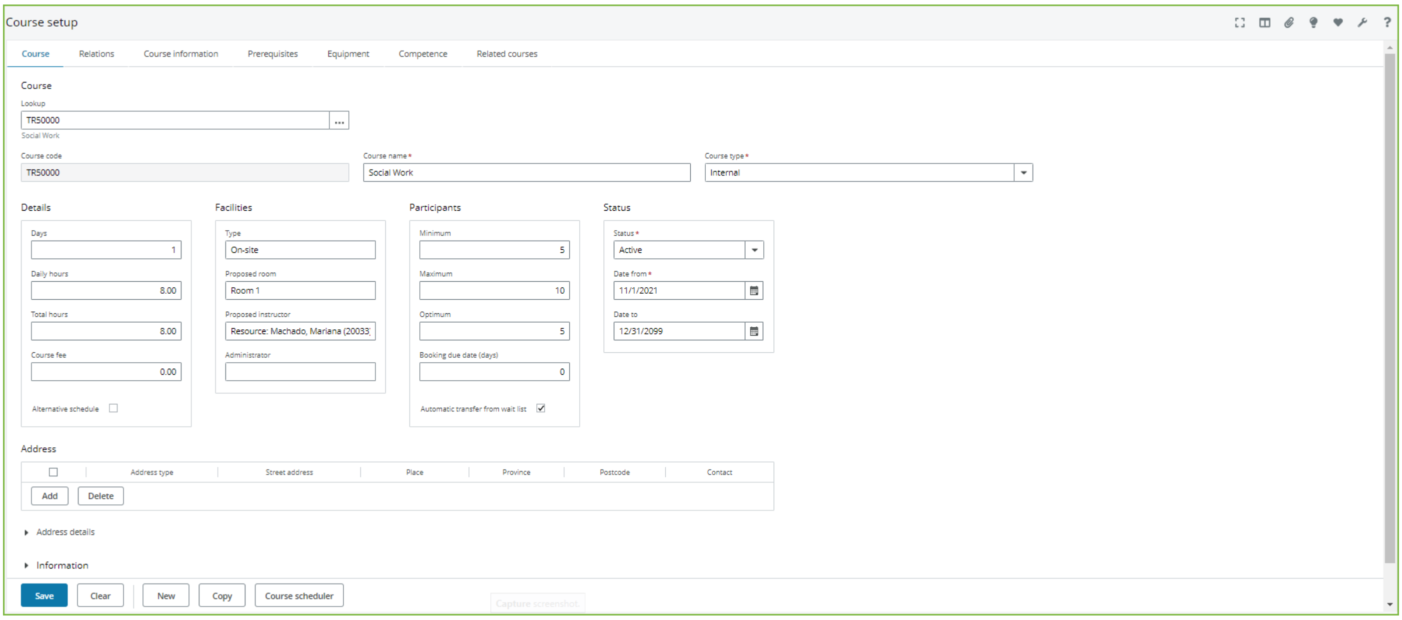


Figure 17 - Course setup window

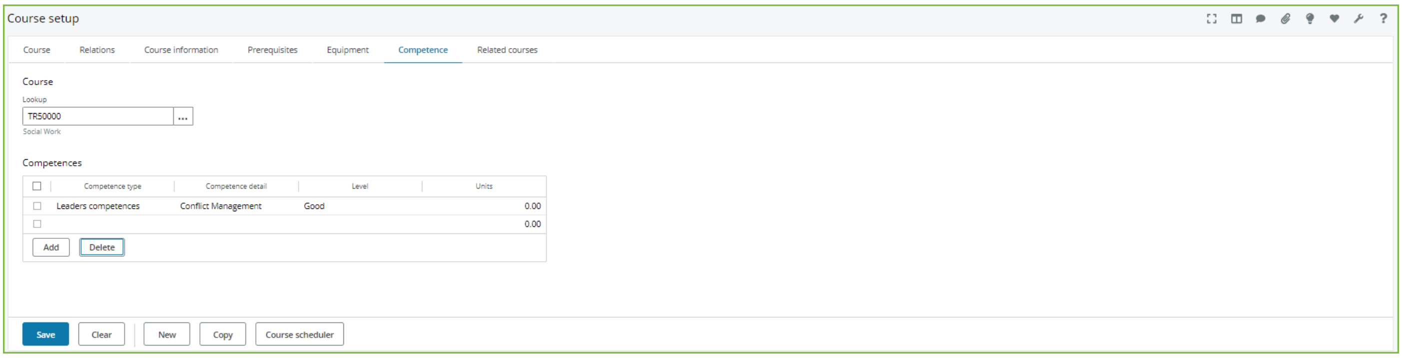


Figure 18 - Course setup window - Competence tab

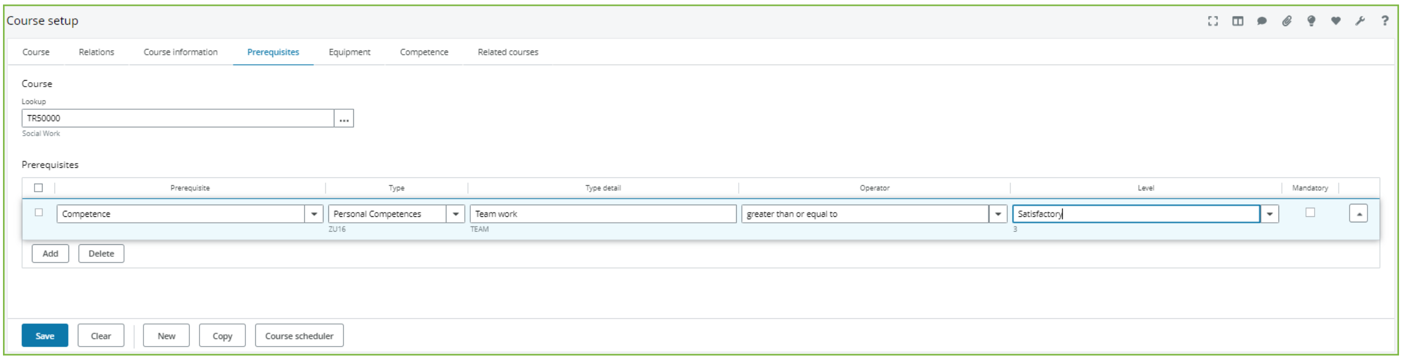


Figure 19 - Course setup window - Prerequisites tab

When saved, the solution will automatically number the course with a unique ID.

Course scheduler

The course scheduler allows you to schedule courses based on the course information stored in the course setup. The course schedules contains the actual dates the course is held and any other additional information required.

A trainer can enroll participants directly to the course here by entering the names of the participants. The trainer also uses the course scheduler to update the course status for the participants. A direct link to create the evaluation forms is provided.

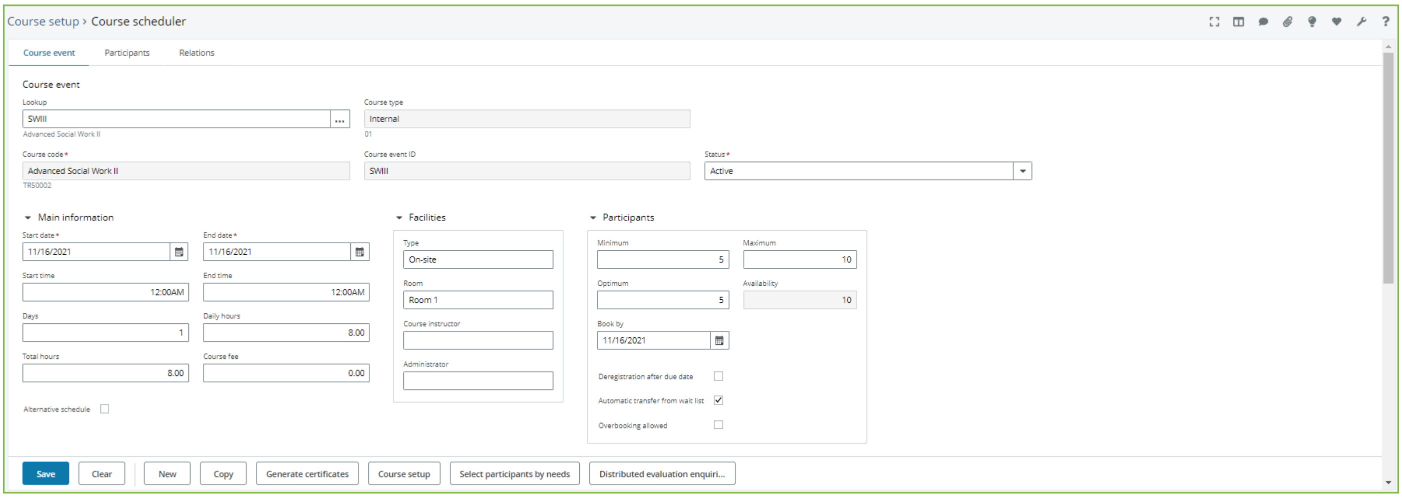


Figure 20 - Course scheduler window

Course catalog

This solution allows individuals to search and sign up for available training courses; this is done through the Course catalog window. In this window, you also get an insight into the courses already completed and the ones you have signed up for already.

The solution checks the employees competencies and completed courses and shows whether they meet the prerequisites for each course. In the case of too many participants, the solution will add individuals to the wait-list until someone cancels their enrollment or creates a new course.

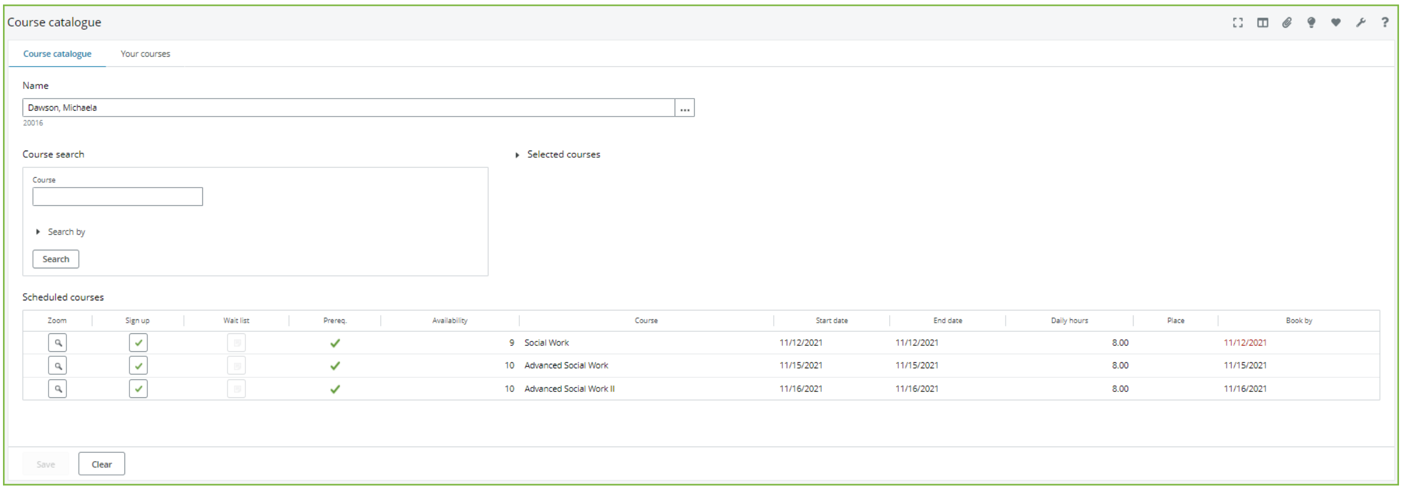


Figure 21 - Course catalog window

The solution enables the definition of Course packages, allowing registration on multiple courses at once; for example, you can create an Induction course package. The course package allows employees to sign up without having to meet the prerequisites for the individual courses.

The Training department or HR team can also perform a course enrollment directly in the course scheduler.

If an individual no longer wants to attend a course, they have the option to deregister.

Using the requirement analysis capability, the HR team can define matching criteria based on competencies and course information, and perform a GAP analysis, thus identifying candidates for specific training and enroll them automatically.

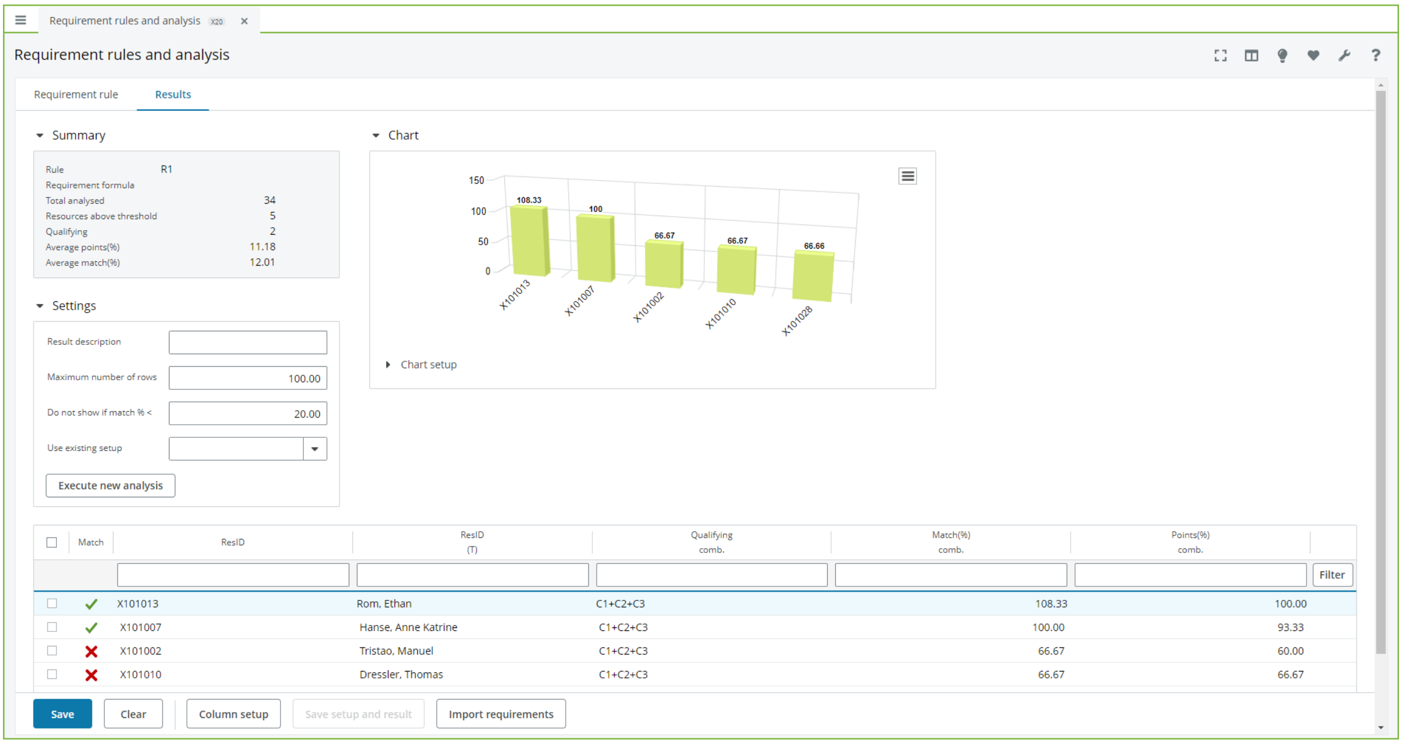


Figure 22 - Requirement rules and analysis window

Course review

The solution provides a workflow review process for managers to approve or reject the course requests. If the approver rejects the request, they must enter a reason justifying it. A rejected request is returned for cancellation. If approved, an email is sent notifying the requester.

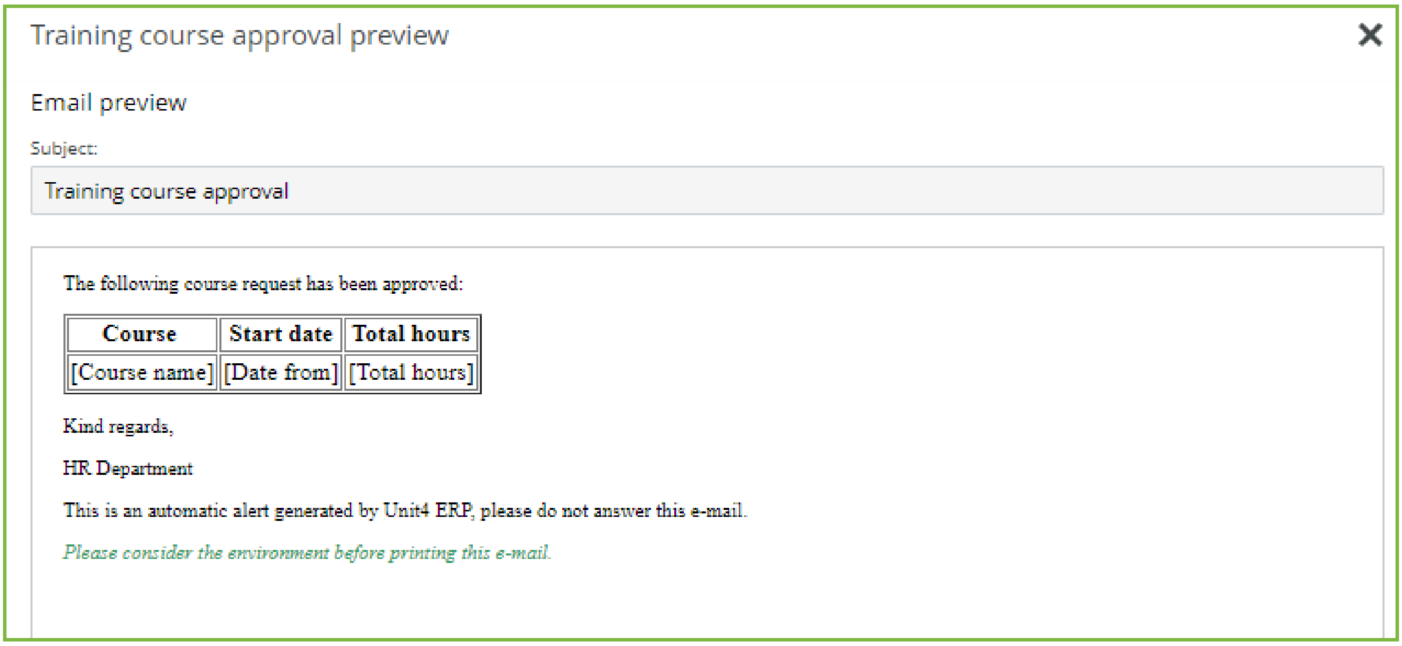


Figure 23 - Example of course notification

If an individual chooses to deregister from a course, a request is sent to the manager for approval. The manager only has the option to approve the deregistration.

Course completion

After completing the course, the trainer updates the status in the course scheduler window.

The solution provides evaluation forms to evaluate the completed courses. These evaluation forms are distributed to attendees to enter their comments using multiple choice or open questions. The templates are based on a set of standard questions, which are part of the configuration.

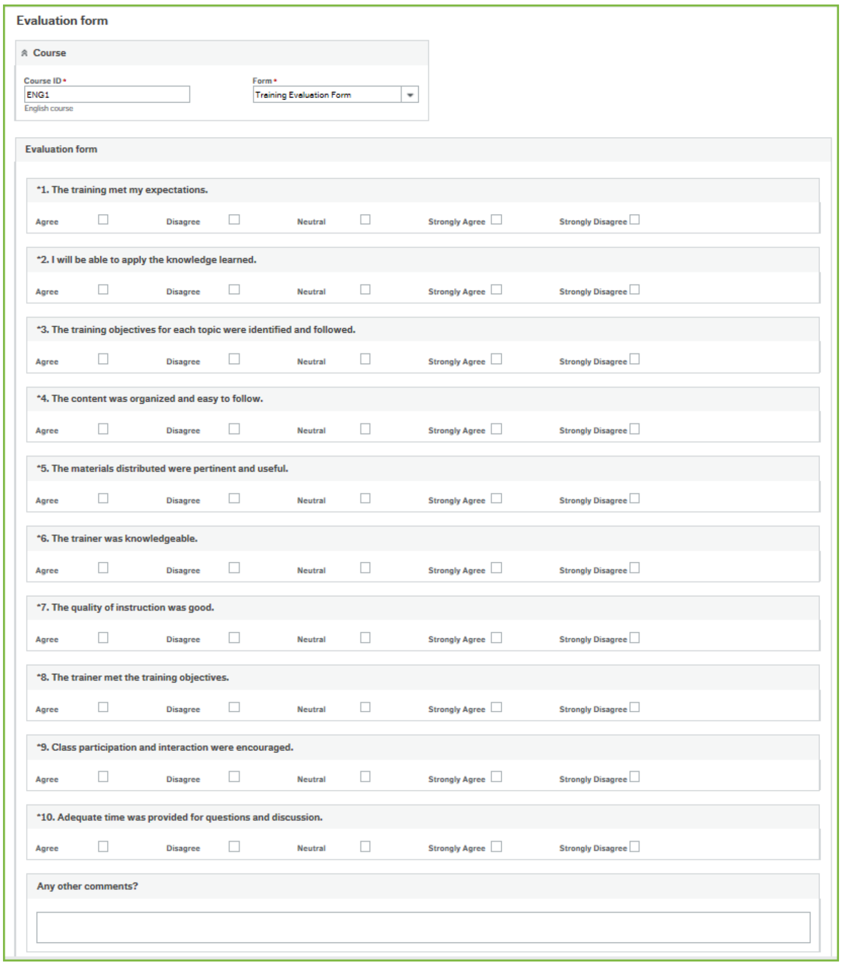


Figure 24 - Evaluation form

The following training reports available are:

Reports	Description
Resource	My Upcoming Training
HR Team	HR Training Bookings

Leavers

Leaver management

When the resource has confirmed to leave the organization, the resource record is closed and not available for transactions anymore. But first, information is captured about the reason for leaving during an exit interview.

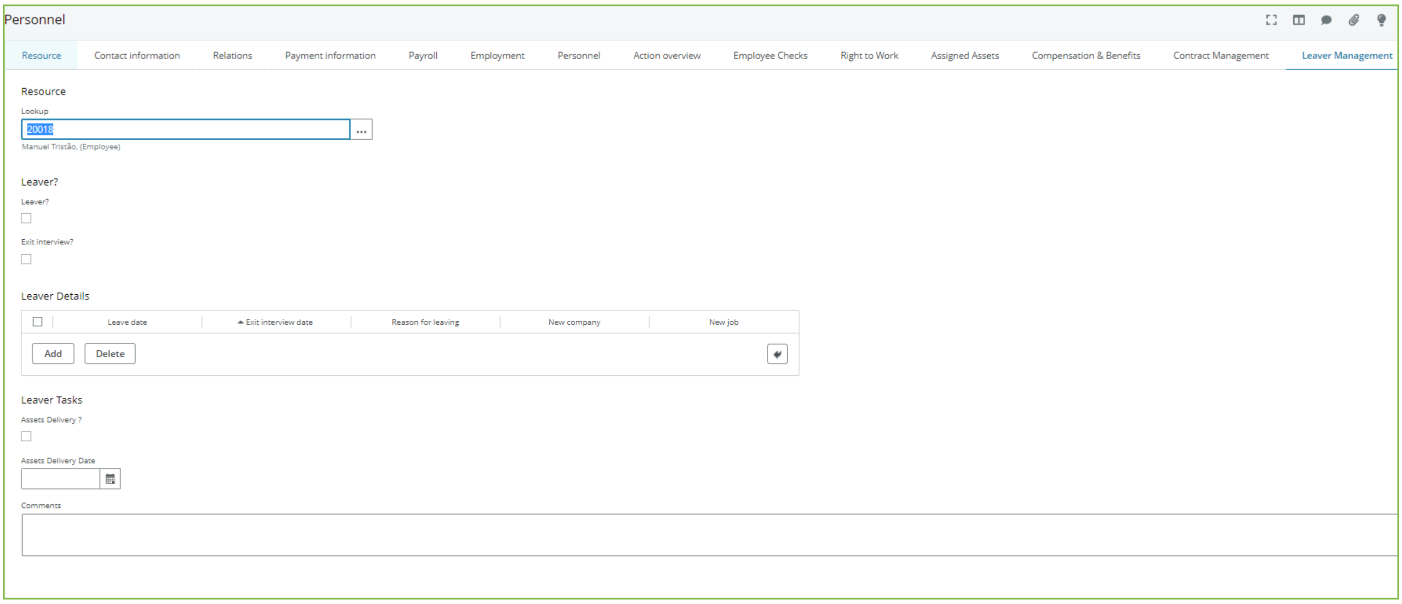


Figure 25 - Resource leaver management section

Anonymization of resource data

According to the GDPR (General Data Protection Regulation) in the European Union (EU) personal data must be protected. Therefore, each person has the right to have their data anonymized.

The solution provides an anonymization process for resources that anonymizes the resource record as well as the resources supplier record, including potentially attached documents and resource labels. This is based on inactivity of the resource. The process starts with running a proposal containing inactive resources. A maintenance window shows the selection and has validated whether there are active transactions on the selected resources for anonymization. After review and approval, the confirmation is run to apply the anonymization.

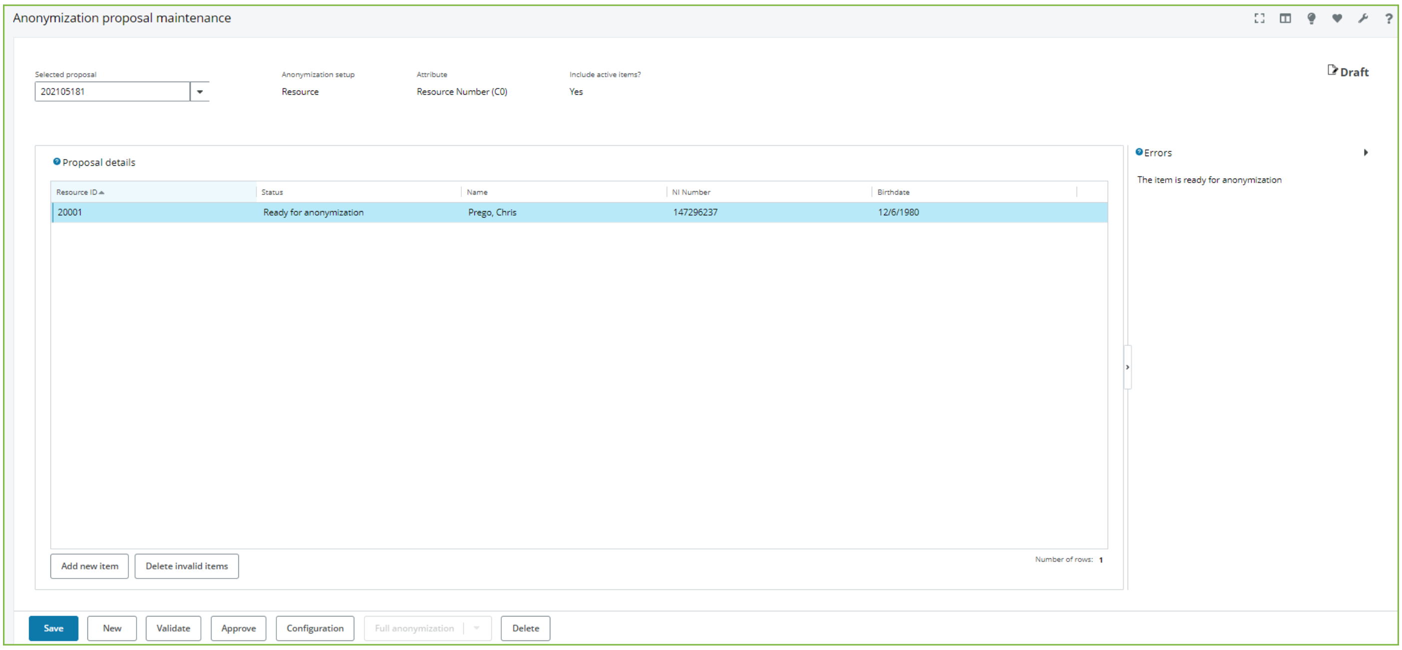


Figure 26 - Resource anonymization maintenance

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