Cloud or On-Premise
Human Capital Management

Interact HRMS Product Overview

One single integrated suite of 85+ modules covering HR, Payroll, Time, Benefit, Talent and Risk management through a uniquely intuitive web-based portal.

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Executive Summary

Interact HRMS is a unique solution in the global market of HRIS applications for a number of important reasons:

1) **Original Developer.** All the software offered by 2interact is originally developed and owned by 2interact, which means support will be guaranteed and there is no risk of incompatibility of versions of modules due to other software vendors' plans. 2interact is in control of the entire solution, even the hardware (biometric devices). The software industry is full of companies who grew by acquisition and offer a clutter of unrelated products as if they were one solution. 2interact is one of the few who have developed everything themselves.

2) **Global Design.** All products of Interact HRMS are designed to support international functionality and are not specific to any country. All functionality is configurable; even payroll and tax rules are policy based and parameter driven. Everything is available with full support for multi-currency and multi-language. Interact HRMS is already implemented in more than 35 countries and will continue to extend its support for other countries through its alliance with implementation partners around the world.

3) **Seamless Integration.** Since 2interact develops all its products, all modules are seamlessly integrated by original design and there is no need for separate 'interfaces' to be developed.

4) **Shared Foundation.** All functions in Interact HRMS work with the same underlying logic, same look and feel, and same intuitive processes. They share workflows, alerts, reporting, self-service, HR actions and of course the actual employee database. There's only one place to log in to access everything a user needs to know or do.

5) **Cloud or On Premise.** Interact HRMS solutions are designed for Cloud or On-Premise deployment and are 100% pure internet applications. A Cloud client can take the software and database in-house by switching to an On-Premise model, which is unique in the world of HRIS software providers.

6) **Ease of Learning and Use.** Interact HRMS is designed to provide enterprise functionality that remains easy to deploy, easy to learn and easy to use thanks to the consistent user interface and the adherence to best practices in the design of all the modules.

7) **Customizability and Uniformity.** If a client has any unique requirements, 2interact can provide customization (at a very competitive cost) if the features can be provided as generic new functionality that can be included in the general build of the product, so the client does not have a unique version of the software and all clients use the same product.

8) **Powerful Business Intelligence.** Collecting massive amounts of data is not going to assist leadership in making informed decisions unless this information is available when required and in the format in which it is needed. Interact HRMS ships with more than 700 standard reports, each of which has countless context-specific filters, can be exported to PDF, Excel and Word and is subject to all standard security and access rights already defined for the various user groups, so that specific users can only obtain reports for the data sets & functionality for which they have been authorized access. In addition, Interact HRMS has more than 100 Key Performance Indicators (KPIs) available out of the box on the KPI Dashboard for display in charts and graphs.

Interact HRMS - Guiding Principles

Simplicity. Interact HRMS solutions are designed to be simple in everything they do. Whether your needs are complex or very basic, there is always an elegant and simple way to satisfy them, and that is what we strive for.

Ease of Use. Simplicity leads to Ease of Use. The biggest challenge in the industry is that enterprise applications become so complex that users require constant training just to be able to perform regular tasks. Our mission at 2interact is to make sure that users at any level can quickly learn their specific tasks and perform them on their own. Due to the powerful self-service capabilities, all transactions can be performed by those users who are closest to the data (i.e., employees can fill in their benefit enrollment forms, leave requests, training requests, address change, etc.) instead of having this done by HR personnel.

No duplicate entry. Interact HRMS is designed as a modular but fully integrated solution. There is only one database and one set of employees for which all functions are performed in the same system. This means that there is no possible scenario in which data may be entered into the system and would need to be re-keyed in afterwards by another user for another module. Anything that is entered into Interact HRMS will automatically be available in all modules and for all users who are properly authorized to access it.

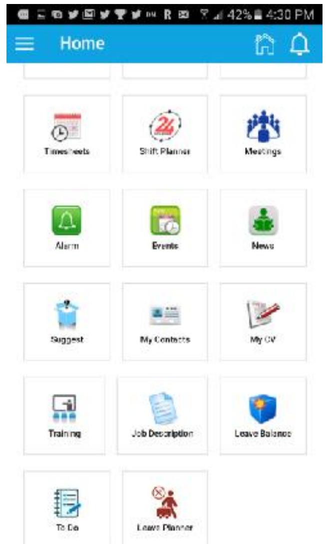
Web-Based application. Interact HRMS is a true web-based application, it is a Rich Internet Application (RIA) of the new generation, unlike most existing HR and Payroll solutions which were developed in the 80s and 90s and carry with them a lot of legacy code underneath the (sometimes) pretty web-interface. In the case of Interact HRMS, there's only one single way to access the application: the browser. Whether you deploy on-premise (in house) or in the cloud (hosted), you will be using the same product. Your payroll, timesheets, and everything else are available 100% through a browser, with absolutely no need for any type of remote connectivity software or installation of local "client" software.

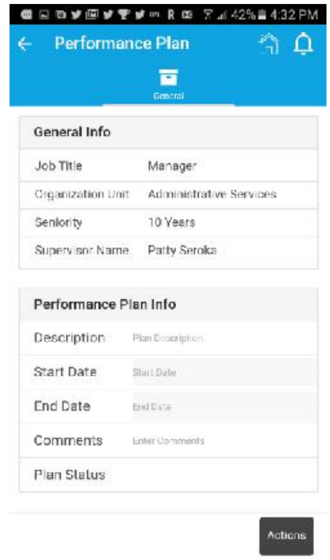
Powerful interfaces. While Interact HRMS offers exceptional integration among its 85+ modules, there will always be external vendors and solutions which clients may want to integrate with like background-check vendors, benefit carriers, government agencies etc. These interfaces are supported in interact HRMS using powerful built-in interface capabilities for Web Services, including HR-XML based Web Services, as well as integration with APIs, import/export using CSV or Excel, or specific formats as per the third-party vendor's requirements.

No Third Party. Most HRMS vendors will offer you a plethora of products, many of which are not even owned by the vendor. While it all sounds interesting and may even look pretty, you soon find out that no one is really in charge once there is a problem. The product vendor doesn't own the source code and can't fix it, and in some cases you may even find out the third-party vendor is no longer happy with the relationship and one day decides to drop the agreement, leaving clients out in the cold. This risk does not exist when you purchase Interact HRMS since all the software we provide is developed and owned by us.

The Power of Open Source. Interact HRMS is developed leveraging the best tools in the world of Open Source: PhP, MySQL and Apache. These were chosen because of their built-in simplicity. They are simple to install, simple to maintain and simple to work with. Just like Interact HRMS, they are fairly recent yet already proven technology tools. Our choice of solutions like MySQL has been validated by the fact that the world's biggest web applications (YouTube, Facebook, LinkedIn, Wikipedia, Twitter, etc.) all rely on MySQL to power their highly scalable and secure environments. On the other hand, the same MySQL database can also be installed on a small laptop and used to process your payroll! Open Source solutions like these also have the advantage of not tying you to any particular operating system or hardware. Note that this does not mean that our solutions are also open source. Interact HRMS is provided under a standard commercial license and the source code is not published.

Mobile Apps



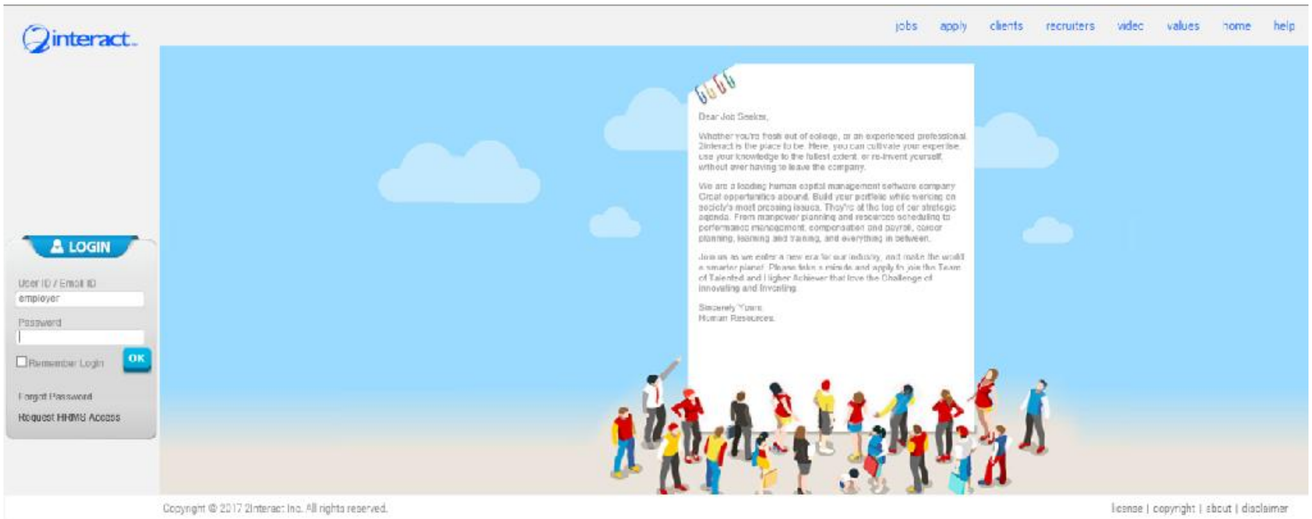


Interact HRMS Employee Self-Service applications can also be accessed through Smart Phones on iOS and Android devices. These applications support the same functionality that is available in Interact HRMS Employee and Manager Self-Service, including:

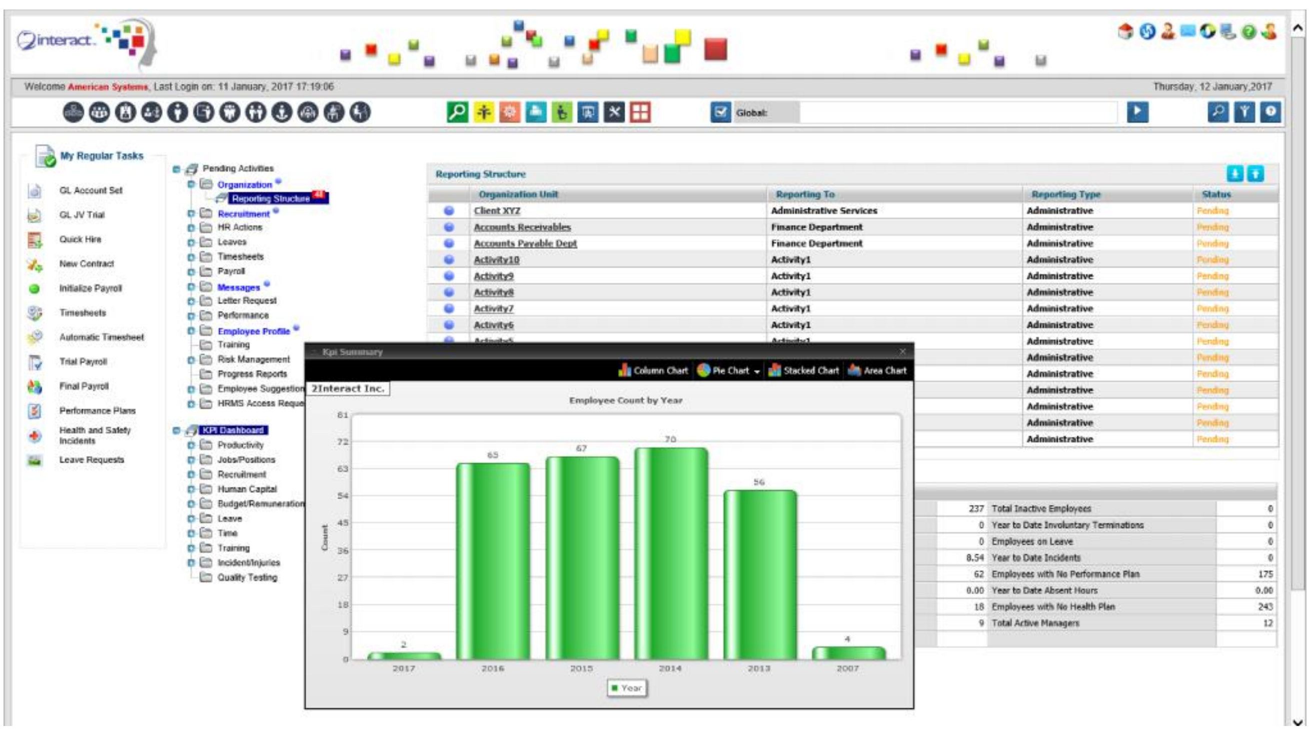
- Request and approve leave
- Execute performance management tasks
- Request training registration
- Clock in or clock out for project/client/activity
- View pay slips
- View and approve timesheets
- Submit ideas & suggestions
- Submit progress reports
- Confirm acceptance of an event invitation
- Read company news announcements
- Confirm attendance to a meeting
- View or update a CV/resume
- Update or create a new to-do list

Note that in order to use the functionality of the Employee Self-Service, the underlying Interact HRMS module must be deployed as well. For example, in order to use Leave Requests online, the Interact HRMS Leave Request module should be deployed with all the relevant rules and policies.

Intuitive Web-Based Interface

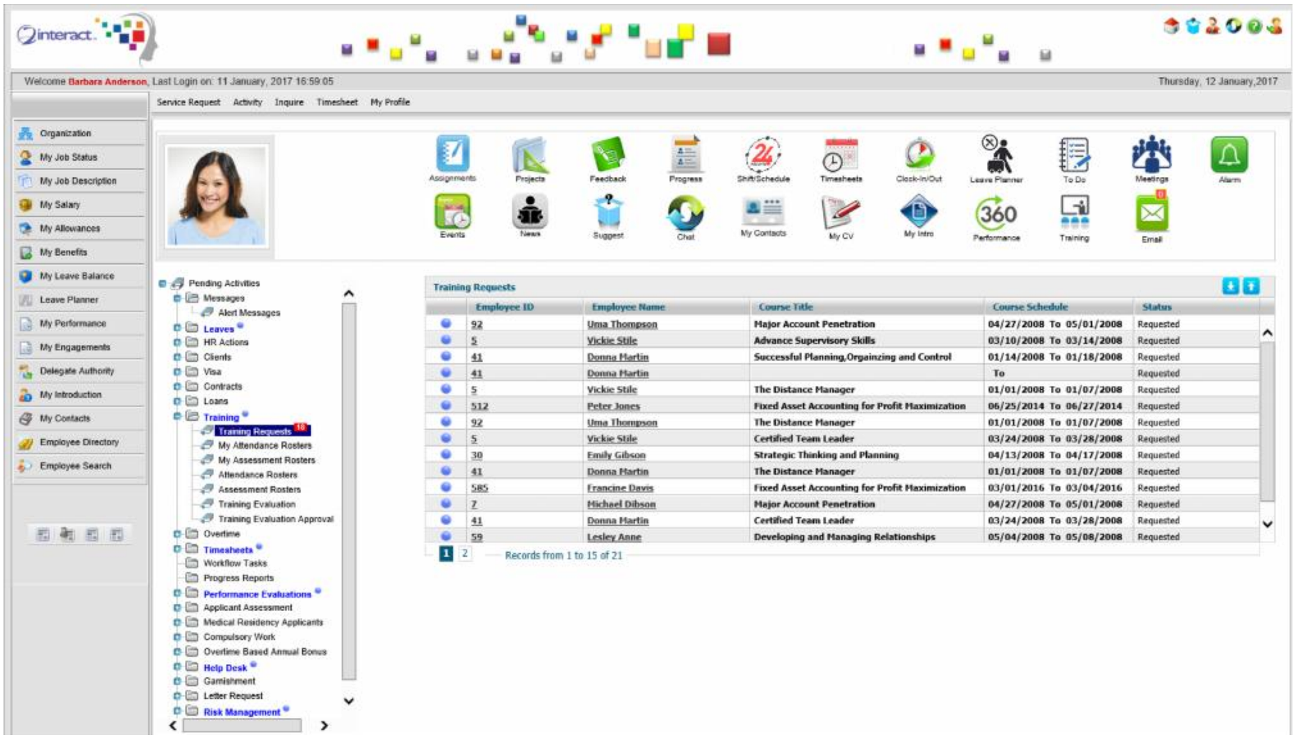


The Welcome & Login Screen is the single point of entry where all users, internal and external. This applies to employees, managers, applicants, department heads, HR staff, external recruiters and clients.



The Employer Desktop shows the full view of what HR Administrators and other users processing transactions in HR can access, all from a single page. You can save your favorites (shown in the left pane), giving you one-click access to any function in the system. You can also immediately see any pending activities requiring action through workflow, and view KPIs in both table and graphic formats.

In addition, the user can access all 85 modules and all forms and reports from this screen by simple entering the relevant keyword in the menu search, which will display the required screen. The intuitive interface eliminates the need for scrolling through lengthy lists of menus. The user will quickly become familiar with this browser-based interface which is 100% consistent across all the applications of Interact HRMS.



Employee Self-Service is designed in the same intuitive manner as all Interact HRMS modules. It is the area where employees access all functions that are relevant for them: inquire about information, request services from HR, perform reviews and approvals, communicate with other employees or departments, and ensure others are aware of new policies, events, news, announcements and assignments which have been given to them.

Interact HRMS Application Functionality Overview

Recruiting, Hiring and Onboarding

1. Position Budgeting and Control (iPosition)

This module enables organizations that manage manpower based on a specific Position Budget/Manpower Plan to streamline their position budgeting and reporting processes. Under the Position Budgeting Model of an HR operation, a department (organization unit) in an organization cannot hire an employee unless there is an available position in its budget. The position budget is decided/prepared at the beginning of each fiscal year by having the Organization Unit Heads fill in Position Worksheets which are then consolidated by the system for Review and Approval by Finance and HR.

Once the Position Budget is approved, Position Slots can be created and routed for Approval. Position Slots can be defined with all Compensation elements including Earnings, Allowances, Benefits, Deductions, Bonuses, Commissions and Expenses. Following the creation of Position Slots, the Organization Units can issue Requisitions against their Budget.

iPosition consists of two major components (subsystems): the first is pertinent to "Position Budgeting" or "Manpower Planning", and the second is relevant to "Position Control". Comprehensive functionality is available to handle changes in the position budget. Position Budgeting can also be configured to track the Grade for each position and use a Financial Budget for the same position, based on the Grade Step matrix that is defined.

General Features

- Best-practice position budgeting cycle including fiscal year-based position budget worksheet, review, and approval.
- Position classification definition by position slot using multiple position control numbers.
- 4-dimensional Salary Grade-Step Matrix definition including grade, step, education, and years of experience.
- Automatic inheritance of the Job Classification information when defining each position, including grade, education and experience requirements.
- Position-based recruitment.
- Position-based hiring and contracting.
- Position budget flag by organization unit. If set, all recruitment and hiring will be controlled by the position budget of the organization unit, while other units can be set up to use open hiring that is not driven by a position budget.
- Processing against vacant budgeted positions.
- Position budgeting at the organization unit level and consolidation at the employer level.
- Tracking the status of each position/position slot including assigned, vacant, allocated, and on-hold positions.
- Cost analysis of Position Budget versus Actual Manpower.
- Eliminate vacant positions.
- Transfer vacant positions from one Organization Unit's budget to another.
- Change Position Attributes including Position Compensation Budget, Funding Source and Position FE.
- Extend position vacancy and make a position permanent.
- Fully integrated with all other Interact HRMS applications.

2. Recruitment Management (iRecruitment)

A streamlined requisition-based recruitment system that supports both internal and external recruitment, where recruitment contracts as well as invoicing for external recruitment services are processed electronically.

Supports requisition against position budget, review and approval of requisitions, online applicant/application registration, multiple levels of screening of applicants/applications, user-defined screening indicators/questions and scoring, scheduling of applicant interviews with no limit on the number of interviews (including interviews by committee), automatic notification for interviewers using Email or Text Message (SMS), user-defined screening, assessment, and interview parameters, job offer notification, auto-matching of applicants to requisitions, and applicant/application search.

General Features

- Job Catalogue/Classification Maintenance
- Applicant Registration
- Recruiter Registration
- Issue Requisition based on Organization Unit
- Convert Requisition to Job Advertisement
- Submit online Application for a Job
- Auto-Match Applicants to Requisitions
- Auto-Match Applications to Requisitions
- Manual Search in Applicant Database using many criteria
- Mark Search Outcome for Applicant to be Screened
- Assign Applicant/Application to a Requisition
- Schedule Applicant Interview with unlimited number of interviews
- Predefined interview questions by Job
- Conduct and capture Interview findings and recommendations
- Recruitment Action and Associated Letters
- Recruiter Contract Management
- External/Recruiter Requisition
- Recruiter Applicant Screening
- Recruiter Applicant/Application Referrals
- Invoicing by Recruiter
- Employment Offer created with minimal data entry
- External Job Description separate from Internal Job Description
- Fully integrated with Workflow Management
- Create Interview Panels/Committees
- Populate Applicant Resume from LinkedIn profile
- Search and filter capabilities for applicants in job vacancies
- Publish to external Job Boards using HR–XML Web Services
- Allow Applicants to Update/Edit their Profile
- Customizable Welcome Screen for Applicants
- Onboarding Documents for New Hires available in Applicant Self-Service

3. Contract & Hiring Management (iContract)

iContract enables organizations to easily create Employment Contracts/Agreements using user-defined templates. It also allows users to hire quickly and auto-generate job offers. With Contract & Hiring Management, you can define unlimited Types and Templates of Employment Offers and Employment Contracts/Agreements with specific attributes like default contract period, and associated Jobs or Employee Groups. Contracts can be tracked, alerts can be received for expiration of contracts, and amendments can be tracked for any Contract changes.

Employees can be hired using Quick Hire or through a sophisticated New Employment Contract process where all attributes of the new Employment relationship are predefined, including Assignment Date, Hire Date, Work Start Date, Job Title, Employee Group, Organization Unit, Compensation Elements, Probationary Period, Work Calendar, Normal Shift, and much more. Using the Inheritance Framework, when a user selects the Employee Group and Organization Unit in which a new Employee is hired, the application checks the setup and configuration to provide a list of only the applicable Job Titles, Contract Types, Shifts, etc.

Once an Employee is entered with the correct Basic Salary (which can be inherited from the Grade/Step associated with the Job Title), the system automatically assigns all relevant compensation policies including Earnings, Deductions, Expenses, Commissions, Bonuses, Benefits and Taxes which are associated with the Employee Group and Organization Unit. In addition, the Employee inherits the relevant Leave Policies.

If the organization uses another core HR solution, then the Contract & Hiring Management module can be used to only hire people. Employee data can be imported from a file exported from the other system.

4. Background Screening

This module enables the organization to set up a standard Background Screening framework and associated policies that support the organization's requirements. It includes background checks for name change, address history, education, certification, previous employment, driver's license history and infractions, criminal record, credit history and more.

The application provides flexible management of background check service providers and is fully integrated with external background check systems and applications through HR-XML. Background Screening can be used for new applicants as well as existing employees. The process is workflow based, where the Applicant/Employee completes a Background Check Authorization Form using Self-Service and the HR Officer prepares a Request for Background Screening that includes the required background checks.

The request is automatically sent to the selected provider through an HR-XML message, an email or the provider's API. Once the screening is completed, the system automatically receives the background check report, stores the information and forwards the report to the appropriate HR Officer(s).

5. Onboarding Management

This module enables users to create Onboarding Plans with different Activities for each Onboarding Stage, and issue Onboarding Requests automatically upon the hiring of a new Employee. Different Onboarding Stages can be defined for Before First Day, First Day, First Week, First 90 Days, etc. For each stage, a set of Activities will be defined and assigned to Onboarding Officers who can be Process Owners and/or Process Champions. The objective is to ensure that new employees can be productive more quickly by arranging everything in advance. Onboarding Requests include Security Clearance, Medical Exam, Asset Assignment, Application User ID, Uniform, Business Cards, etc.

Onboarding is seamlessly integrated with Employee Self-Service and Applicant Self-Service using Workflow and Alerts to ensure that those assigned a Task will be notified in advance. Applicants can also access Onboarding information prior to their first day at work.

Onboarding Management is a highly configurable application that allows for defining a framework with any number of Onboarding Activity Types, Document Types, Form Types, Uniform Types, Office Types, etc. Once this framework is created for each Type, the user can create any number of Activities, Documents, Forms, Uniforms, Office Spaces, as well as Non-Disclosure Agreements, Union Agreements, etc.

As the Onboarding Process takes place, new hires and employees involved in the onboarding process can provide feedback and comments/scoring on each Onboarding Activity, and track the Progress of the Onboarding Plan.

Performance Evaluations can be part of the Onboarding Process with a range of Appraisals that include Before First Day Appraisal, First Day Appraisal, First Week Appraisal, First 90 Days Appraisal, etc.

6. Probationary Period Management

This module allows you to carefully monitor and assess new employees while they are still in their Probationary Period. A standard Probation Plan can be created for new employees. It can include Goals, Training Assignments and Competencies based on which employees will be assessed. Progress Evaluations, Mid-Probation Evaluations, End Probation Evaluations, etc. can be conducted as required. Reports and Alerts ensure that no employee's Probation Period will expire without supervisors and HR staff being aware of it.

Goals in the Probationary Period plan have specific Planned Start and End Dates and can be tracked against Actual Start and End Dates. The status of each goal can be tracked separately as Under Review, Completed, In Progress or Delayed. The supervisor can add comments about each goal.

7. Employee Badge Printing

Enhancing Interact's comprehensive Onboarding as well as Time, Attendance and Access Control solutions, users can now also leverage this powerful module that connects the two processes. Once an Employee is hired and the Onboarding process has started, you can automatically issue badges directly from Interact, without having to use another application to drive your badge printer. You can design the layout of badges and determine what data to display on them. Options include the employee's picture, name, ID, title, office location, phone number and hire date, as well as the company's name and logo, and much more.

Different badge design formats can be created to support various requirements based on the company, location or employee group. Direct integration with a badge printer is supported, so there is no need for importing, exporting or any data-entry.

Badges that are printed on the appropriate Proximity, Mifare or HID cards can immediately be activated using the Time, Attendance and Access Control application. This enables you to define access rights for employees in different buildings and immediately activate the access at all appropriate access control devices with a single update, regardless of how many devices are deployed.

Human Resources Administration

8. Organization Management

Organization Management is a very powerful application that allows for defining the structure of the organization in multiple user-defined ways. Interact HRMS is an enterprise system which supports any number of employers and can be deployed in a single database or with a separate database for each employer. Within each employer, defining the organization structure will automatically produce a graphic organization chart . The user can define an unlimited number of Organization Units, reporting relationships, and reporting levels. Organization Units can be classified in Groups, Work Unit Types, Work Units or other types of Classifications including (but not limited to) Company, Branch, Division, Department, Section, Project and Activity.

The organization structure is important for reporting purposes: reports can be run per organization units or per a groups of units. The structure is also important for costing purposes where the application is used for payroll, and payroll cost needs to be distributed by cost center, project or activity. In addition, the organization structure is used as a foundation module to ensure reporting lines are clear and all workflow approval processes function as per the defined reporting lines. Most reports in Interact HRMS can be filtered by Organization Unit.

Reporting among organization units can be defined based on an administrative, a functional and a technical reporting line, or a user-defined type of reporting line. Each reporting relationship has Start and End Dates, and can have a manager with a scope of authority defined with it.

Organization Units can be controlled by a position budget or be open for hiring based on standard requisition and approval processes. Each unit also has Self-Service capabilities described below under Organization Unit Self-Service.

Each Organization Unit can also have performance goals and strategic goals associated with it, which can then be used for Performance Management and KPI Management.

9. Unified Employee Electronic Record

The Unified Employee Electronic Record brings together all details from the entire HR system which relate to a specific employee. No longer will an HR officer have to go back to papers and spreadsheets once the data has been properly captured in the Interact HRMS. The UEER provides you with an easy-to-use multi-tab form (see image below) that includes details on General Demographic, Education, Skills, Experience, Job Details, Leave, Competency Evaluations, Performance Reviews, Career Plans, Training Records and Succession Plans. In addition, a second level of data is available at the user's fingertips, to pull up the complete History (all Transfers, Promotions, Compensation Changes, Deductions, and Contract Amendments).

You can also easily find the Employee's Work Schedule and Holiday Schedule, the Timesheet and Attendance Sheet, the Payroll Details and Payroll Audit report, Emergency Contact Details, Address Information, Passport Details (Visa, Passport, Dependents), as well as a list of other items under the Miscellaneous header including Certifications, Military Service Records, Security Credentials, Patents, Publications, Speaking Events, Associations, Languages, Medical Records and any other Supporting Material which needs to be attached to the Employee Electronic Record.

10. Sticky Note Management

Sticky Notes help HR/Payroll users in tracking important notes/comments that require further follow-up. By creating a Sticky Note, the HR/Payroll user will ensure that whenever he/she logs in, the Note will appear and Alert the right people so that no information can get lost. A Sticky Note 'sticks' on the Employee Record until it is Deleted, or it can be Saved for future reference. Sticky Notes can be shared with other Users and Emailed, and will automatically pop up for the right person when he/she logs in. Notes can be highlighted in different colors and prioritized, as well as set up with their own Reminder function that is triggered in a number of specific days.

11. HR Action Management

Interact HRMS is an HR Action-driven application where specific Personnel or HR Actions can be initiated by the HR Department or requested by Managers and Supervisors. This will then automatically trigger a workflow which will assign Tasks to specific users who may need to Review or Approve certain steps in the process of the Personnel/HR Action. Scanned Documents can be attached and Alerts can be sent automatically to ensure that everything is followed up correctly. HR Actions are at the core of the system and can be defined for any process. Predefined HR Actions include:

- Attendance / Labor Distribution Timesheet
- Contract Termination
- Employee Demographic Change
- Employee Dependent
- Employee Housing Request
- Employee Job Assignment Change
- Employee Promotion or Demotion
- Employee Rehiring after Termination
- Employee Termination
- Employee Transfer
- Employee Travel Request
- Employee Visa Request
- Employee Job Assignment Type Change

- Job Reclassification
- New Hire
- New Position Request
- Position Budget Worksheet
- Position Reclassification
- Renewal of Contract
- Requisition Request
- Training Registration Request

12. Disciplinary Actions Management

Disciplinary Actions management allows you to define a list of Policy Infractions/Violations which will be linked with a user-defined list of Severity Levels. The process starts with a Report of Infraction which can then be assigned to an Employee for further Investigation. The outcome of the Investigation will be documented together with the resulting Disciplinary Action and saved on the Unified Employee Electronic Record.

The application supports a framework of Progressive Disciplinary Actions and is completely configurable. All Severity Levels, Infraction Types and Disciplinary Action Types are user defined and color coded for easy display, highlighting the most critical ones.

13. Policy Publishing

Policy Publishing allows for defining Company Policies and publishing them to Employees based on the applicability of each Policy to a particular Employee Group, Job Category, Job Class or Job Group. Employees can read the Policy through their Self-Service and electronically acknowledge that they have read it. The HR Department can run reports on who has and who has not yet acknowledged reading a new Policy. Policies can be categorized as HR Policy, IT Policy, General Policy, etc. Any changes to Policies can be tracked as well, so that the history of Policies and their updated Versions is clear and documented.

The structure and framework of Policies are fully configurable, and include the following attributes:

- Policy Number
- Policy Name
- Organization Unit
- Version
- Type
- Creation Date
- Version Date
- Effective Date
- Status
- Purpose
- Conditions
- Description
- Document File Name
- Policy Text
- User Defined attributes

14. Passport and Visa Tracking

This module allows you to track Passports and Visas for your staff. Run reports and receive alerts regarding expiration of these documents, keep a scanned copy on file and allow Employees to apply for Exit/Entry visas in countries where this is applicable. You can track multiple passports for employees who have more than one nationality, and attach up to 10 scanned pages of each passport.

You can track the current location of the passport in case it is with a specific department for administrative reasons.

In addition, you can define any number and type of Visas, define the renewal process for visas, and ensure the employer is aware of any Work Permits/Visas which may be expiring in the future. All expiration date information can be produced in reports and exported to Excel, Word, PDF, etc.

Using the comprehensive access control capabilities of Interact HRMS, a specific user can be set up to have access only to Visa or Passport information of a specific Employee Group or Organization Unit, but not to other information of the same employees.

15. Housing and Accommodation Management

Housing and Accommodation Management allows the user to manage the inventory of housing units, no matter how small or how large, to ensure that all housing inventory and rental properties leased by the company are used to their maximum potential.

Housing and Accommodation Management gives the company a clear overview of which employees are staying in which units and when leases will expire. It ensures that accommodation is planned ahead.

You can keep track of the Lease, Landlord, cost and amenities in each housing unit. You can also process requests for changes in Housing Assignment.

16. Travel Management

Travel Management allows the user to request for a Ticket to be issued along with a Leave Request or Business Trip Request. It also allows for Travel Approval Requests which include cost estimates for Travel, Hotel Accommodation and Car Rental. Detailed information can be entered by the employee, including the reason for the Travel Request, meeting information, travel itinerary, etc.

All travel requests can be routed to the appropriate supervisor using the workflow and alerts engine. Once approved, the information can be automatically forwarded to the company's internal or external travel agency.

Travel budgets can be tracked for each expense type.

Travel Management is integrated with Expense Management so that Expense Claims can be linked with approved Travel Requests for easy reconciliation.

17. Employee Asset Management

This module allows you to define Asset Types and Asset Items (Laptop, Cell Phone, etc.) and assign them to Employees. When an Employee leaves, there is a clear record of what assets need to be returned. It also allows Employees to request Assets and Return them using Self-Service.

All Assets will be defined with their detailed characteristics including serial number, purchase date and current value. The company can also track On-Hand, In-Store and Assigned Quantities.

18. Parking Space Management

The module enables companies to define the parking space inventory and track which parking spaces are assigned to which employees. Employees can request a parking space through self-service. Once the request is approved, any premiums to be paid for the specific parking space requested will be automatically deducted from the payroll for the employee as per the company policy. You can set up a detailed definition and classification of various types of Parking Spaces, to ensure optimal distribution of the Parking Spaces to the employee population. The Parking Space inventory can be tracked with many attributes, including:

Parking Space

- Space Number
- Location

- Description
- Level
- Row
- Adjacent Space Left
- Adjacent Space Right
- Restriction by Job Group
- Restriction by Job
- Type of Vehicles Accepted
- Distance from Parking Entrance
- Nearest Elevator Number
- Covered Yes/No
- Cost Per Month
- Charge/Fee to Employee
- Charge Frequency
- Type
- Tenancy Type
- Cost Per Year
- Charge Frequency

Parking Location

- Elevator Requires Access Card
- Type of Vehicles Accepted
- Total Cost Per Month
- Location Map
- Property Type
- Parking Location Name
- Building Number
- Number of Entrances
- Number of Elevators
- Security Camera

19. Office Space Management

Office Space Management enables departments and HR users to plan office space based on manpower and recruitment plans. By using this module, the organization can ensure that there is no underutilization of office space or a sudden lack of space. Employees and departments can request office space through the employee self-service and organization unit self-service capabilities. HR can access all the requests which have been received. Office space can be grouped and reported on, and the user can obtain a list at all times of which types of office spaces are currently in use, and which ones are currently vacant or expected to be vacant in the near future.

You can define any type of office space and within your entire office space inventory. This application is seamlessly integrated with the Onboarding and Offboarding modules of Interact HRMS. You can track:

- Usage Type (Office, Meeting Room, Laboratory, Storage)
- Occupancy Status (Occupied, Vacant)
- Space Size
- Windows
- Nearest Elevator Number
- AC Heater Control (Independent, Shared)
- Furnishing (Number of Desks, Number of Chairs – Phone Set, PC, Meeting Table, Whiteboard)
- Lock Type (Key, Access Card, Biometric Access)

20. HR Risk Management

This module provides a very powerful and comprehensive Risk Management application which fully leverages the seamless integration with other Interact HRMS modules, and relies on Self-Service, Workflow and Alerts to make sure any reported Risk is properly assessed, tracked and mitigated.

The Risk Management framework includes the capability to classify any Risk as Operational, Financial or Legal. You can define mitigation strategies, including strategies to Avoid, Reduce, Retain or Transfer an identified Risk. Default Alerts can be set up to notify the Risk Manager, HR Department, Employee Supervisor, Employee Manager, Risk Officers, Organization Unit Head, etc. The frequency of Risk Assessment, Risk Mitigation Action Planning and Risk Mitigation Action Planning Reviews can be defined, and involved parties can be automatically notified.

The assessment can include tracking Risk Occurrence Probability, Risk Consequence with its own Risk Indicators, and Risk Business Impact with its own Business Risk Indicators.

Employees can identify Risks using Self-Service and Workflow. Once reported, these risks will be reviewed by Risk Committee members who can find all relevant information on their Interact HRMS Portal. Using the Risk Assessment capabilities, a Composite Risk Index will be determined based on assessed Consequence and Probability. An Extended Composite Risk Index will then be calculated, taking into account the Business Impact Level. A Recovery Timeframe will be determined, followed by a Risk Mitigation Strategy Plan.

This Risk Mitigation Strategy Plan can be reviewed periodically to ensure that it is up to date and relevant for the specific Risk it is supposed to address. Using powerful plotting tools, the application can provide relevant users with a graphic display of assessed risks, showing clearly and immediately the risks requiring the most urgent attention.

21. Health & Safety Management

Interact HRMS allows the user to define the general HSE Classification to be followed when tracking Injuries and Illnesses on the Job. Once this Classification has been chosen, specific Injuries and Types of Illnesses can be defined so they will be part of the standard reporting mechanism required to support HSE management in the Organization.

When a work-related Injury or Illness occurs, it can be recorded on the Employee's record. The event can be reviewed and approved by various authorized individuals, and finally kept in the Employee Electronic Record. The Injury Log will contain information on the specific Accident that occurred which caused the Injury, the Treatment which took place as a result of the Injury, and the Details of the circumstances under which the Injury or Illness was sustained.

By using specific user-defined codes tor tracking Illnesses and Injuries and relying on standardized terminology, the Employer will be able to easily create reports and analyze data to understand trends and underlying causes of Injuries and Illnesses.

22. Letter & Certificate Management

This module lets you define any number and types of Letters and Certificates which can be generated automatically upon request or based on a Workflow event. Based on user-defined Templates, specific Employee data elements will automatically be merged with the Template to create the needed document. Letters and Certificates can be requested by Employees through Self-Service and approved by Supervisor. They are then generated subject to HR approval.

23. Supervisors & Managers Management

Since Supervisors and Managers play a very important role in the HRMS system, any changes in Supervisors or Managers need to be managed carefully. This can be done using this module, which lets you define all the reporting relationships, handle termination of Supervisors or Managers and reassigning of their Subordinates, and manage Subordinate Transfer Requests. All Workflow processes and reporting-related HR processes will automatically be rerouted to the new Supervisor as of the Effective Date of the new Reporting Relationship.

24. Suggestion Box Management

The Suggestion Box Management module is part of the portal functionality of Interact HRMS, and allows employees to communicate with HR on issues that go beyond core HR matters. Using this module, employees can submit ideas on new Suggestions that may improve the business by simply submitting them through their Self-Service portal. Suggestion Boxes can be setup for various topics/domains so that the receipt and processing of these new ideas/suggestions can be structured and organized. Users can be appointed to be responsible for monitoring the submissions received in the various Suggestion Boxes, and review committees can be set up to review and assess the submissions.

Employee suggestions will consist of a brief description of the suggestion with a clear indication of what kind of impact the suggestion will have on the business, as well as the timeframe and cost of implementing this new idea or suggestion. The system also lets the user indicate who contributed to the idea, in case it was a group suggestion.

Once a submission has been reviewed and deemed promising, a reward recommendation can be submitted by the evaluators. The final reward, once approved, can be automatically included in the payroll run for this employee.

25. Offboarding Management

End-of-Employment Planning (or Offboarding), is a comprehensive module to manage the process of ending an Employee's Employment or a Contractor's Contract. In order to make the transition smooth, Employers will be able to create End of Employment Plans which will manage all relevant Activities and allow for the creation of an End-of-Employment Activity Checklist, the management of Exit Interviews, and the scheduling and management of Handover Activities. There are no limits in terms of type and number of End-of-Employment Activities which can be created as part of the End-of-Employment Checklist, or the number and types of activities which can be defined to manage the Handover process.

Employees and all personnel involved in the Exit Interviews, Handover of Project Activities and other End-of-Employment Activities will be notified through Email Alerts and can view their pending Activities through Self-Service. Exit Interviews can be custom built with specific Questions and Question Groups that can be responded to through Self-Service.

Benefit Management

26. Benefit Planning and Enrollment

Benefit Management is designed to support advanced Benefit Administration and allows the user to define unlimited types and numbers of Health and Welfare Benefits as well as Retirement Benefits. Employee eligibility will be determined based on Policy. Eligible employees can enroll or exit from Benefit Plans through Self-Service. Enrollment will be automatically communicated to Benefit Providers. Employee Dependents can be enrolled online as well.

27. Pension Fund Management

This module allows users to define specific Terms and Conditions as well as Eligibility Rules for Pension Funds in countries where Pension Funds are tracked by the Employer and rules differ based on the Employee Seniority.

Pension Fund contributions can be deducted automatically through the Payroll module.

28. Investment Fund Management

Investment Funds or Savings Plans can be defined and linked to specific Benefits provided by the Employer. Minimum and Maximum Contributions by both Employer and Employee can be defined, as well as Eligibility rules, Payment Rules and who is entitled to Withdraw funds based on which Terms. The application is integrated with Interact's Payroll.

Compensation and Payroll Management

29. Compensation Management

Compensation Management allows the user to define any number of Allowances, Earnings, Bonuses, Commissions, Benefits, Deductions, Expenses and even Piecework rules to be used when defining the Employee Compensation Plans. By creating a logical link with specific Employee Groups and/or Organization Units, the user will enable the system to automatically assign specific Policies to new Employees. HR/Payroll staff will only need to worry about exceptions.

Powerful calculation methods, including an Expression Builder, can be used, in addition to Rate Tables and standard features to define the calculation of specific Compensation Policies to achieve maximum automation.

Compensation management is integrated with the Grades and Steps defined under Position Budgeting, or can be used in conjunction with the Hay Job Evaluation which will define the correct salary range for Employees based on their Hay Job Evaluation outcome.

30. Payroll Management

Interact HRMS offers a comprehensive global Payroll and Compensation Management module which is seamlessly integrated with the Employee Contract Management and the Time and Leave Management modules. It supports both timesheet- and deliverable-based earnings as well as unlimited types of Earnings, Benefits, Allowances, Commissions, Bonuses, Deductions, and Taxes. It supports payroll best practices including Auto Timesheet generation, default timesheet, unlimited trial payroll runs, and final payroll runs with comprehensive audit trails. Interact Payroll supports paycheck printing as well as electronic payroll bank deposits, cash cards, and cash payments. More than 250 payroll reports and payroll-related audit reports are included with multicurrency support.

In the Payroll Parameter Setup, the User can define the key parameters which will drive the payroll process. This relates to the standard Payroll Calendar, Standard Minimum and Maximum Work Days / Hours per Pay Period, Work Hours per Day, the Rounding Method, Rules about deducting Absent Hours, and much more. It also allows the user to define the default Pay Period either for the whole company or for a particular Employee Group. Pay frequencies include Weekly, Semi-Montly, Biweekly, Monthly and Quarterly. Entirely unique Pay Periods can also be defined.

The Payroll Process can be fully flexible – allowing the user to choose the steps and their order – or highly structured, whereby a default Payroll Officer can be defined for and then notified about each step in the Payroll process.

The most basic Payroll Process in Interact HRMS consists of 6 steps:

- Payroll initialization
- Automatic Time Sheet
- Trial Payroll
- Final Payroll
- GL Processing
- GL Posting

Additional steps can be added and specific Workflow processes can be associated with each step, in case separate reviews or approvals are needed. Alerts can be triggered if specific steps are not completed within the defined timeframe or if specific conditions occur that require an alert by email, SMS, or through the Interact MyPage.

Each Payroll Policy type (Earning, Allowance, Deduction, Commission, Bonus, Expense, Tax) has its own definition forms, allowing for highly configurable functionality, including the following:

Earnings:
- Can be used for Salaried, Hourly or Piecework employees
- Can be paid in any Currency
- Can be associated with Org Units, Employee Groups or Grade and Steps, so new Employees inherit the appropriate Earning Policy
- Can be taxable at Federal, State and/or City (local) level
- Can be set up as deferred Earning (to be paid later)
- Can be defined as a Retroactive Adjustment
- Can be defines as a Previous Pay Period Adjustment
- Include Effective Date and Stop Date
- Calculation Method can be:
- Time Dependent (with different options for the Earning Time Unit of Measure: Day, Hour, Month, Year)
- Flat Amount (with an Earning Pay Rate per Unit and a Pay Factor)
- Rate Table (which can be based on Deliverables, Dependents, Education, Grade Step, Grade Step Education, Salary Scale, Seniority, or a User-Defined set of variables)
- Based on Piece Work Units
- Function of
    - Basic Salary
    - Net Salary
    - Gross Salary
- Expression using the Expression Builder, which supports:
- Tables (all Tables and all Fields available in Interact HRMS)
    - Functions (Mathematical, String, Date & Time)
    - DBFunctions (Aggregate, String Comparison, Mathematical, Date & Time, Full Text Search, Information, Miscelanneous)
    - Operators (Arithmetic, Assignment, Bitwise, Comparison, Error Control, Execution, Incrementing/Decrementing, Logical, String, Array)
    - DBOperators (Arithmetic, Comparison, Bitwise, Logical)
    - Expressions
    - Control Structures (Statements, Repeat Structures)
- PHP Script (for complex expressions)
- Support many different types of Overtime and Shift Differential Calculations, including Day OT Rate, Evening OT Rate, Night OT Rate, Rest Day/Weekend OT Rate
- Offer the ability to:
- Define Maximum OT Hours
- Transfer OT Hours
- Define Different OT Rates by Holiday
- Flag if Earning should be excluded if Employee is on a particular type of Paid or Unpaid Leave
- Define a Fund Source of the Earning
- Link a Budget Item with the Earning
- Link an Expense Cost Item with the Earning
- Link a Liability Cost Item with the Earning
- Set up Time/Labor Allocation to be either Fixed or a Percentage based or Both
- Distribute Labor Cost by Cost Center, Project or Contract

Allowances
- Support various Allowance Types (Expense, Monetary, Non-Monetary, etc.)
- Allowance can be a Retroactive Adjustment
- Allowance can be paid in any Currency
- Allowance can be Taxable at Federal, State and/or City (local) Level
- Leave Code can be Associated with an Allowance

- Allowance can be Deferred
  - Date for When to Pay the Deferred Allowance can be defined at the Employee Level
- Allowance Policy can be assigned Effective and Stop Dates
- Allowance can have an Effective Status set to Active or Inactive
- Allowance can be set to be Processed Every Pay Period or Every Alternate Pay Period
- Allowance can be Time Dependent (based on Actual Work Hours)
- Allowance can be a Function of:
  - Basic Salary
  - Net Salary after Tax Deduction
  - Expression created using the Expression Builder (similar to Earning Definition above)
- Allowance Calculation can be based on a User-Defined Rate Table
- Allowance Calculation can be based on a standard Allowance Rate Table using Parameters such as:
  - Basic Salary Range (From / To)
  - Nationality
  - Seniority Range (From / To)
  - Marital Status
  - Minimum Number of Children
  - Maximum Number of Children
  - Number of Children
  - Payment Type (Flat, Number of Pay Days, Percentage)
  - Value (Per Child or For All Children)
- Allowance can be linked with Fund Source, Cost Item, Budget Item, Liability Item, Expense Item, Payable, Bank/Asset)
- Non-Monetary Allowance can be defined as any of the following:
  - Airfare Ticket
  - Company Cell Phone
  - Company Cafeteria
  - Company Parking
  - Company Recreation Center
  - Company Car
  - Company Health Care Plan
  - Company Uniform
  - Company School
  - Company Transportation
  - Company Housing
  - Company Gym
  - Company Babysitter
  - Other
- Accrual Provision Annual Cost can be set at the Employee Level for each Allowance
- Labor Cost Distribution for Allowances can be based on Project, Contract or Cost Center

Deductions

- Deductions can be Paid in any Currency
- Deductions can be defined for Retroactive Adjustment
- Deductions can be defined for Previous Pay Period Adjustments
- Deductions can be defined for Timesheet Adjustments
- Deductions can be set up to be Deferred
- Deduction Policies can be assigned Start and Stop Dates
- Deductions can be set to be Active or Inactive
- Calculation Methods for Deductions include:
  - Time Dependent with Deduction Time Unit of Measure (Day, Hour, Month, Year)
  - Using Deduction Rate Table
  - Deductions can be based on:
    - Basic Salary

  - Gross Salary Before Tax Deduction
  - Gross Salary After Tax (User can determine which Allowances to include in Gross Salary Calculation)
  - Expression using the Expression Builder
  - A Script
- Deductions can be Taxable at Federal, State and/or City (local) Level
- Deductions can be set up as Previous Pay Period Excess Deduction Adjustment
- Deductions can be set up as Flex Leave Purchase Deduction
- Override of Deduction can be allowed as the result of an HR Action (Amendment, Promotion, etc.)
- Deductions can be made for a Third Party
- Deductions can be controlled for Minimum Take-Home Pay
- Deductions can be set up with their own Deduction Priority
- Deductions can be linked with Fund Source, Cost Item, Budget Item, Liability Item, Expense, Payable, and Bank/Asset
- Deduction amounts can be distributed by Cost Center, Project or Contract

Commissions

- Commissions can be Paid in any Currency
- Commissions can be set up as Retroactive Adjustments
- Commissions can be Taxable at the Federal, State and/or City (local) Level
- Commissions can be Deferred
- Commissions can have Effectivity Start and Stop Dates
- Commissions Calculation Method can be
  - Flat Amount with a Rate per Unit
  - Based on a Commission Rate Table
  - Based on a Commission Expression using the Expression Builder
- Labor Cost Distribution can be done by Cost Center, Project or Contract
- Commission can be linked with a specific Fund Source, Budget Item, Expense Cost Item, and Liability Cost Item
- Commissions can be linked with specific Product Types
- Commissions can be linked with the Commission Management module, which allows for setup and calculation of sophisticated Commission Schemes

Bonuses

- Bonuses can be paid in any Currency
- Bonuses can have Effectivity Start and End Dates
- Bonuses can be Retroactive Adjustments
- Bonuses can be a function of
  - Previous Gross Pay
  - Previous Net Pay Before Tax
  - Previous Net Pay After Tax
- Bonuses can be Taxable at Federal, State and City (local) Level
- Bonuses can be Deferred
- Bonuses can be Time Dependent with any Time Unit of Measure and Pay Rate per Unit
- Bonuses can be a Flat Amount with any Pay Factor
- Bonuses can be based on a Standard Rate Table with multiple variables including:
  - Deliverable Rate Table
  - Dependents
  - Education
  - Grade Step
  - Grade Step & Education
  - Salary Scale
  - Seniority
  - User-Defined Rate Table

- ❖ Bonuses can be Performance Dependent with a Specific Performance Goal Type
- ❖ Bonuses can be One Time or Recurring
- ❖ Bonuses can be Goal Based with the Option to Define a Performance Goal
- ❖ Bonuses can be based on Averages with an Average Factor
- ❖ Bonuses can be set up with Labor Distribution by Project, Contract or Cost Center
- ❖ Bonuses can be linked with Fund Source, Cost Item, Budget Item and Liability Item

Benefits

- ❖ Benefits can be paid in any Currency
- ❖ Benefits can be Retroactive Adjustments
- ❖ Benefits can be Previous Pay Period Adjustments
- ❖ Benefits can have Effectivity Start and Stop Dates
- ❖ Benefits can be Included or Excluded from GL/JV Posting
- ❖ Benefits can be Processed Every Pay Period or Every Alternate Pay Period
- ❖ Benefits can be Time Dependent with a Benefit Time Unit of Measure
- ❖ Benefits can be a Flat Amount
- ❖ Benefits can be an Expression defined using the Expression Builder as described above
- ❖ Benefits can be set up with Benefit Rate Table Values
- ❖ Benefits can be set up with a Health Care Plan Rate Table
- ❖ Health Care Plan Rates can be Increased or Decreased with Percentage or Flat Amount
- ❖ Benefits can be set up with Separate Employee Contribution Percentage and Employer Contribution Percentage
- ❖ Benefits can be linked to Third-Party Benefit Providers
- ❖ Benefits can be set up with Labor Distribution by Cost Center, Project or Contract
- ❖ Benefits can be defined with Separate Fund Sources for Employee and Employer, Budget Item, Expense Cost Item and Liability Cost Item
- ❖ Benefits can be Linked with different Benefit Providers

Expenses

- ❖ Expenses can be paid in any Currency
- ❖ Expenses can be Linked to Allowances
- ❖ Expenses can be Loaded through Batch Expense Sheets and Personal Expense Sheets through Employee Self-Service
- ❖ Expenses can be Distributed by Cost Center, Project or Contract
- ❖ Expenses can be Billable or Non-Billable

Taxes

- ❖ Interact's Tax Engine is designed as a Global Tax Engine which can be used to define any Tax in any Country without any customization
- ❖ Tax Calculation Types:
    - ➢ Step Based
    - ➢ Bracket Based
    - ➢ Cumulative
- ❖ Taxes can be Deferred
- ❖ Taxes support EIC with a setting for Maximum Earning Per Pay Period to qualify for EIC
- ❖ Tax Calculation Method can be:
    - ➢ Percentage Based
    - ➢ Wage-Bracket Based
- ❖ An unlimited Number of Tax Authorities can be defined with Address, Contact Person and Phone
- ❖ Calculation Method supports:
    - ➢ Time Dependent
    - ➢ Flat Amount
    - ➢ Function of Base Salary
    - ➢ Function of Gross Salary

- After Exemption
- Calculate Tax After Deducting Personal Tax Exemption
- Tax Expression as a Script
- Local Taxes
- Applying Standard Deduction with Min & Max Percentage
- Separate Bonus-Based Tax Exemptions with a Bonus Exemption Ceiling
- Tax Expression which supports:
  - Tables (all tables and all fields available in Interact HRMS)
  - Functions (Mathematical, String, Date & Time)
  - DBFunctions (Aggregate, String Comparison, Mathematical, Date & Time, Full Text Search, Information, Miscelanneous)
  - Operators (Arithmetic, Assignment, Bitwise, Comparison, Error Control, Execution, Incrementing/Decrementing, Logical, String, Array)
  - DBOperators (Arithmetic, Comparison, Bitwise, Logical)
  - Expressions
  - Control Structures (Statements, Repeat Structures)
- Labor Costing by Cost Center, Project or Contract

Payroll - General Features

- Payroll Calendar Definition by Employer (company)
- Normal Payroll Cycle with user-definable pay periods
- Off-Cycle Payroll
- Retroactive Payroll
- End-of-Service Payroll
- Default Earnings, Allowances, Benefits, Commissions, Deductions, and Tax Withholdings by Employee Group and Organization Unit
- Automatic Inheritance of Earnings, Allowances, Benefits, Commissions, Deductions, and Tax Withholding from Employee Group when creating Employment Contract
- Auto-Timesheet (ATS) Generation from Attendance Timesheet
- Auto-Posting of Leave Taken as Earning in ATS
- Predefined calculation method of Earnings, Allowances, Benefits, Deductions, and Tax Withholdings
- Multiple Payroll Trial-Runs without affecting the database
- Multicurrency support
- Final Payroll Run and Pay Period Closing
- Check printing and Direct Deposit
- Electronic Bank Deposit Advice through Employee Self-Service
- Electronic Check Slip through Employee Self-Service
- Automatic posting of Leave Earnings to Payroll Timesheet
- Automatic Leave Accrual at the end of each Pay Period
- Payroll Ledger Posting to the G/L
- Multiple Bank Accounts

31. Payroll Wizard

The Payroll Wizard is a powerful module designed to make running the Payroll even easier in Interact HRMS. All key steps in the Payroll process can be included or excluded depending on the organization's specific needs. Once configured, the user will no longer have to remember which steps to follow or which menu to choose and, most importantly, will not be able to forget a critical step which may impact the outcome of the Payroll. Using the Payroll Wizard, Interact HRMS will automatically inform the user which step needs to be executed next, and will launch the appropriate screen(s) for each step at the click of the "Next" button when the current step is completed.

This module is particularly useful for organizations that have very clear and standardized payroll processes and large data volumes, or different pay cycles that may cause an inexperienced payroll officer to forget a step.

Using the Payroll Wizard, it will be easier to introduce new users to the system. Your payroll process will be driven by the system (based on your rules) and less prone to human error.

32. Expenses Management

Expense Management enables the Employer to define various Expense Policies and the types of Expenses which can be claimed by specific Employee Groups or Employees in specific Jobs. Employees can then enter their expenses online through Employee Self-Service. These expenses can be identified as billable/non-billable and can be in multiple currencies. Approved Expenses will automatically be sent to Payroll for reimbursement. Employees can also attach copies of the Expense Receipt as part of their reimbursement request.

33. Labor Costing and Billing Management

Labor Costing and Billing Management allows you to accurately calculate the Direct Labor Cost, Labor Burden Cost and Overhead Cost. You can define the Yearly Production Hours used to calculate an accurate Fully Loaded Cost or Labor Burden Cost per Hour of a specific Employee, thereby enabling the Company to more precisely determine the correct Billing Rate required to make a specific Employee profitable.

34. Garnishment Management

This module allows the user to define any type and class of Garnishment, track Court Orders or Tax Agency Orders in favor of a Spouse, Tax Agency or Creditor. Attach scanned documents and track all relevant information regarding a Garnishment Order. Garnishment Management is seamlessly integrated with Payroll management, ensuring that the correct amounts are withheld from an Employee's Wages or Salary up to the legal limit that is applicable by Federal and State Law. Alerts will be sent to the appropriate Employee, Supervisor, or HR/Payroll user when an amount has been withheld or a specific target amount has been reached. Built-in Workflow ensures that correct Approvals are obtained for the Payroll Officer to process the Garnishments. Any number and type of Payees can be created. Payments of withheld amounts will be processed automatically by Check or Electronic Payment.

35. Loan Management

This module facilitates the administration of Loans provided to Employees directly by the Employer or even by a Third Party. The application enables you to define different Loan Types and Loan Agreements, with and without Collateral, with and without Guarantors, at specific interest rates. Many parameters can be used to define the Loan Amount which an Employee is eligible for, including the Employee's Salary, Seniority, and other factors. Employees can request Loans through Self-Service. They can request an adjustment, early Repayment or restructuring of the Loan, and can monitor the Loan Balance online. Loan Installments can be automatically deducted through the Payroll.

36. Commission Management

This module offers extensive capabilities for calculating Sales Commissions of Employees based on Product Categories and complex calculation methods. Commission Management is seamlessly integrated with Compensation and Payroll management. It allows the user to import sales or other results based on which the Commission will be calculated. It can also connect directly with external ERP systems to obtain information required for Commission calculation.

Commission Rate Tables can be maintained, and different Commission Percentages can be defined based on Product Categories or Customers. Commission Management can be used to track different types of Sales Transactions and their resulting Commissions even when Third Parties and External Agents are involved in the Sales Process.

37. Third-Party Payables

For amounts which are withheld from employee's paychecks and need to ultimately be paid to third parties, Interact HRMS offers a Third-Party Payables module which allow the user to configure how these payments should be handled. Payments can be posted to the organization's Accounts Payable module or be processed directly with an ACH bank file that will be produced by the Third-Party Payables module, along with journal entries for your General Ledger module.

Third-Party Payables can be used for making payments to benefit providers like insurance companies, Social Security Administration and other agencies. In addition, the same module can be used for processing Tax payments for taxes that are withheld from employees.

Payments can be processed as electronic payments in the format appropriate for your bank, or through check printing. A detailed payment advice can be produced as well.

Compliance Management (U.S. Only)

38. Cobra Administration

This module offers powerful features to ensure COBRA compliance. It allows for flexible definitions of Qualifying Events for Employee, Spouse and Dependents. Automatic notification can be sent by email or through Self-Service of COBRA Notices to ensure that Employee, HR and others are aware of COBRA-related events. COBRA Administration is tightly integrated with Benefit Management and includes the ability to notify Benefit Providers automatically through carrier connections.

39. FMLA Management

This module allows an Employee to submit an FMLA Leave Request form for Continuous, Intermittent, or Reduced Work Schedule FMLA Leave. Any relevant documents from a Health Care provider can be attached as part of the Leave Request. Alerts can be set up to ensure compliance with FMLA rules. Reporting dates and deadlines are kept. FMLA Management is seamlessly integrated with the core Leave Management module, with Employee Self-Service and with Benefit Management.

40. FLSA Management

To help Employers comply with the Fair Labor Standards Act of 1938 regarding Minimum Wage, Overtime Pay, Tipping of Employees and Record Keeping, Interact HRMS provides users with alerts, reports and business intelligence designed to track and monitor compliance and ensure that Employees are defined correctly as Exempt or Non-Exempt based on the criteria prescribed by law.

The FLSA Exemption Test can be conducted using the standard questions prescribed by law. In addition, the application will provide an FLSA Record including a Time and Earnings Record with all the required details that can be viewed by Pay Period or by Year.

41. ACA Management

This module helps you ensure compliance with ACA through powerful reporting, alerts and electronic filing of 1094-B, 1095-B, 1094-C and 1095-C. It also enables you to:

- ❖ Determine the number of FTEs for the company to ensure compliance
- ❖ Track ACA hours by computing them automatically or entering them manually
- ❖ Track medical plan information for all employees
- ❖ Track employee work status (full time, part time, seasonal or exempt)
- ❖ Track Coverage Code, Safe Harbor Code and the Employee's Share of Minimum Plan Premium
- ❖ Flag an employee's "Consent for Electronic ACA"

Leave, Time and Attendance Management

42. PTO/Leave Management

Leave Management allows the user to create any number of Leave Policies, link them to Leave Earnings, and associate them with specific Employee Groups. Leave/PTO/Vacation time can then be requested through Employee Self-Service and approved by Supervisors. Leave Accrual rules can be defined as per the Employer's needs. Employees can see the balance of Leave available to them on their Self-Service page. Leave policies can be set up with Approval workflows that depend on the type of Leave.

Interact HRMS Leave Management is very powerful in defining Leave policies: the same application is used in more than 30 countries around the world.

Leave Management is seamlessly integrated with Payroll Management, Employee Self-Service, Resources Scheduling and Time Clock management. Clock transactions on an approved leave day are highlighted as exceptions. Missing transactions on approved leave days are ignored since the Employee is not expected to clock in or out on that day.

General Features:

- ❖ Define any number of leave policies, each with its own name and code
- ❖ Associate leave policies with employee group for inheritance upon hiring
- ❖ Define maximum number of times an employee is entitled to a specific leave
- ❖ Track leave in hours or days
- ❖ Define paid and unpaid leave policies
- ❖ Allow or do not allow holiday bridging
- ❖ Allow or do not allow weekend bridging
- ❖ Define maximum leave carryover to next year in days or hours
- ❖ Define if carryover must be taken within a specific timeframe
- ❖ Define rules for forfeiting or transferring leave balance in case of inability to carry over
- ❖ Define maximum hours or days for a particular leave request
- ❖ Define whether leave can be requested through self-service
- ❖ Define whether leave should be displayed in the Leave Planner
- ❖ Define whether leave request must be controlled by an approved Leave Schedule
- ❖ Allow advance leave whereby employee can take leave even if the accrued balance is not high enough
- ❖ Determine if a supporting document is mandatory in case a user-defined minimum number of hours or days is requested
- ❖ Define Accrual Frequency as either Monthly or Per Pay Period
- ❖ Define Accrual Method as Fixed or Percentage Based
- ❖ Define if Leave balance can be paid / eCashed
- ❖ Define if Pay In Lieu of Leave is allowed
- ❖ Define if Accrual is based on Rate Table using either Standard Method, Seniority or Grade
- ❖ Restrict leave policy based on gender
- ❖ Set up Leave Plans

- Create Leave Letters based on Templates
- Create Flex Leave Policies
- Use FMLA Leave
- Link Leave Earnings with Leave Policies, allowing you to track the exact cost of Leave for each Employee, Employee Group, Organization Unit, etc.

43. Leave Planner

Using the Leave Planner module, Employees can see who else is going on leave in their team or department, so that there is no confusion or overlapping vacations during critical times or seasonal periods. Supervisors can also consult the leave planner and check who else is going on leave during the period when the employee is requesting leave, and thereby avoid approving overlapping leave requests that may have a negative impact on the business.

The user can determine which leave policies should be reflected in the Leave Planner, which code to use for them, and which color to use when displaying the approved leaves in the chart.

44. Time & Attendance Management

The Time & Attendance Management module allows for creating Work Calendars, defining standard Work Hours and Overtime Rules. Timesheets can be uploaded from XLS or CSV formats, entered manually, imported from biometric devices or loaded from third-party applications.

There are countless types of standard Timesheets that can be used, and many of them can be configured as per the client's needs. The module supports many different types of Timesheets, including the following:

- Summary Timesheet
- Labor Distribution Timesheets with Activities and/or WBS codes
- Labor Distribution Timesheets without Activities
- Timesheets with Leave Hours
- Project-Based Labor Distribution Timesheet
- Batch Automatic Timesheet
- Day Batch Timesheet
- Pay Period Timesheet
- Weekly Leave Timesheet
- Client Timesheet
- Loaded Batch Timesheet - Activity Based
- Functional Timesheets

Timesheets can be reviewed, edited and approved by Supervisors and Organization Unit (Project or Department) Heads before they are posted to Payroll. Timesheets can also be viewed by Employees. Any changes/edits made to Timesheets will be recorded in an audit trail showing who made each change and when the change was made.

Timesheets with Clock In and Clock Out transactions are displayed with any exceptions highlighted in color (missing transactions, duplicate transactions, transactions on leave or rest days, etc.).

Supervisors and Managers can log in through their Self-Service to review/approve various Timesheet formats, and see even underlying raw data for clock in and clock out transactions. These include the following:
- ❖ Employee Time Cards
- ❖ Activity-Based In/Out Timesheets
- ❖ Time Card Summary
- ❖ Time Card Detail
- ❖ Project-Based Timesheet
- ❖ Manual Timesheet Entry
- ❖ Timesheet Editor

Using powerful workflows, the application manages the review and approval of all timesheets from the initial point of loading through the entire approval process and final posting to Payroll.

In order to handle erroneous transactions discovered in already-processed timesheets, handle any changes identified after completion of the payroll, or changes which take place after the payroll cutoff date, the application has powerful timesheet tools that automate the tedious work of comparing and correcting previous timesheets and calculating the impact of these corrections on the current pay period. These tools include:
- ❖ Previous Pay Period Absent Hours Adjustment
- ❖ Previous Pay Period Adjustment Timesheet
- ❖ Previous Pay Period Adjustment Timesheet In & Out Transactions
- ❖ Previous Pay Period Adjustment Timesheet Weekly
- ❖ Previous Pay Period Timesheet Adjustment Overtime Labor Distribution
- ❖ Revised Past Timesheet

45. Biometric Clock & Access Control


Advanced Time, Attendance and Access Control management with a powerful bi-directional interface to a range of Biometric Clock Terminals using Card, Fingerprint and Facial Recognition for identification. Clocks are updated automatically with Employee details, Transfers and Work Hours. Timecards are pulled from the Terminals based on a predefined Schedule, with Alerts and Workflows which can be used to handle Timesheet Review, Edit and Approval.

Enrollment of new biometric clock users is done directly from Interact HRMS software over the web or the LAN/WAN to the Time Clock where the user will place his/her fingerprint or swipe his/her proximity or Mifare card.

Time clocks can be deployed with Access Control functionality whereby entrances (doors) can be set up with specific access rights for particular users only. The doors will open only if a user authorized in the HRMS solution is attempting to access with his/her fingerprint or proximity card. Users can also be recognized through facial recognition with certain terminals.

Time clocks can contain thousands of templates. All time clocks can be managed remotely, with powerful reporting. Time clocks can either contact the server application independently or the server can contact the time clocks to poll the time transactions.

Some time clocks are available with function keys and specific codes.

All data flows seamlessly from the HRMS to the Time Clocks (for new enrollments or cancellation of access for specific users) and vice versa, whereby Time Clock transactions (Clock In and Clock Out) data is obtained from the Time Clock by the server-based Interact HRMS software.

Once raw In/Out data has been collected, it will be reviewed and approved by supervisors before being posted to Payroll. The application can calculate and determine the number of regular hours, overtime hours, rest day overtime, holiday overtime and other types of overtime, and highlight all exceptions in a report and on the relevant Time & Attendance forms.

Polling of data can happen automatically through a periodically (weekly, daily or hourly) scheduled service which contacts the time clocks and reads the required data.

46. Resources Scheduling (iSchedule)

Interact HRMS© Resources Scheduling (iSchedule) is fully integrated with Interact's Time and Leave Management and Compensation and Payroll systems, and with Employee and Organization Self-Service. It uses the same underlying Web technology and architecture used by all Interact HRMS© applications. iSchedule not only allows the scheduling of employees, but it also supports the scheduling of other resources such as equipment. This allows the user to schedule transportation buses, production machines, specific facilities, etc. It supports definition of 24/7 shifts with rotating shifts. You can define clients, locations, equipment, projects, activities and teams, and schedule your employees using self-service to ensure they are assigned to the correct shifts. Integration with holiday calendar, leave management, time and attendance and biometric clocks makes sure that all rules are complied with in case of collective bargaining agreements. This module supports statutory holidays for 24/7 shift workers.

A powerful and easy-to-use Shift Planner shows which employees will be working which shift. The Shift Planner is available on the Employee Self-Service level, so both Employee and Supervisor can see which Shift an Employee is scheduled for. Changes can be made on the fly for a specific day or an entire period by simply selecting another Shift for the Employee.

General Features:

- ❖ Define any number of 24/7 shift pattern types or select from 65 predefined industry-standard pattern types
- ❖ Define Grace Time that is specific by Day for a particular Shift
- ❖ Set up Shift Constraints, including:
- ❖ Allow Assignment of the Shift only once per month
- ❖ Require Pre-Approval for Overtime on the Shift
- ❖ Limit the Overtime on a Shift to a Number of Hours
- ❖ Define a specific Billing Rate for a particular Shift
- ❖ Define Position Requirements and Teams Required for a specific shift
- ❖ Create any number of 24/7 shift patterns based on the selected type
- ❖ Create Clients for scheduling, so employees can be scheduled for a specific Client
- ❖ Link Clients with Projects, Teams, Shifts, Employees, Work Schedules and Risks
- ❖ Create Locations for scheduling, so employees can be scheduled for a specific location
- ❖ Define Equipment for scheduling, so employees can be scheduled to use specific equipment
- ❖ Track Details for equipment including Model, Purchase Date, Service Date details, Hourly Billing Rate, Transport Capacity (in case the equipment is a bus or another type of vehicle), and Operation Hours
- ❖ Define Projects, Contracts and Work Orders, so Employees can be scheduled to work based on Position Requirements for each
- ❖ Easily (using drag & drop) assign Employees to their Work Schedule based on the Position Requirements of a particular Shift
- ❖ Create Teams of Employees who work together as per the same Shift Pattern, sharing Equipment and a Holiday Calendar

- ❖ Allow Resource Scheduling to create the Work Schedule based on the Shift Pattern assigned to the Team to which an Employee belongs

47. Software Clock Management

This module allows Employees to use their Self-Service screen to Clock In/Out and maintain their Timesheets and Attendance Records without having to use hardware -based time clocks. Software Clock Management is seamlessly integrated with Project Management, Client Management, Leave Management and Time Management, allowing Employees to Clock In/Out for a specific Project, Client, Activity, Break or Emergency Leave type. Once the Clock In has been registered it may be viewed by the Employee as part of Attendance Records. Supervisors and Project Managers can make adjustments/corrections where necessary.

The purpose of the software-based Clock-In/Out is to support remote Employees and desk workers who normally do not Clock In/Out using a biometric Clock but for whom you still need to track time worked on particular activities.

Self-Service Management

48. Employee & Manager Self-Service

Self-Service is the core of Interact HRMS and the main contributor to improving efficiency for all users, especially the HR department. Employee Self-Service (ESS) allows Employees to process Requests for Leave, Training, Loans, Letters, and much more. Employees can also inquire about their Salary, Vacation/Leave Balance, Benefits and more. They can enroll in Benefit Plans, fill in Electronic Forms, print Pay Slips, and update their own Employee Profile. Employees can also play roles in other HR Activities such as Performance Management and Recruitment. Employees and Managers can view Timesheets, see Attendance Records and request Overtime if Pre-Approval is required. When Employees edit their Timesheets (to address missing or incorrect transactions), all edits are highlighted and shown on the record for authorized users to approve (if required). Self-Service also allows employees to Clock In/Out online using the Software Clock.

49. Assignment Management

Assignment Management is a Self-Service application which is used by supervisors and their direct reports to assign and track specific assignments related to a client, project or another matter. The supervisor will go online and create the new assignment by describing its purpose, completion date, priority level and urgency level. The new assignment will then appear on the employee's self-service portal or MyPage, where he/she can provide feedback on the Assignment and change the status to Completed once done, as well as update the Actual Completion Date.

50. Project Management

Using the Project Management module in Employee Self-Service, employees can view the projects to which they are assigned and see all the details, provide feedback on the project, the project plan and their assigned project activities. This module is seamlessly integrated with other Project-related functionality in the Resources Scheduling module. This allows for assigning employees to a specific shift on a specific project at a particular location and for a particular client.

51. Feedback Management

Leveraging the strong self-service capabilities of Interact HRMS, the Feedback Management module allows employees to provide feedback on any assignment, project, client and any general matter. This feedback can be shared with a specific person who will also see the feedback appear on his/her self-service portal. There will be a detailed trail of all feedback provided, so that the record remains and action can be taken as a result of any feedback provided. Any employee can respond to feedback which is directed at him/her.

Feedback management tracks the date, time and priority level of the feedback. There is no limit on the amount of information that can be submitted as part of this feedback process.

52. To-Do List Management

By using the To-Do List module through Employee Self-Service, employees can create their own list of action items (to-do items), and share them with anyone in the company who needs to know (supervisor or team/project members). An employee can have multiple To-Do Lists, each with an unlimited number of To-Do Items. The information remain available for reporting purposes even after Item completion. The user can check off each item from the list when it is completed.

53. Employee Alarm Management

This module is used to manage an Alarm Status displayed as either a green, yellow or red light, based on a predefined set of alarms using specific rules. There are three Alarm categories:

1) Alarms triggered by changes to the foundation of the organization that can affect the behavior of the system
2) Alarms triggered by changes to policies that may impact the operation of the organization and the outcome of system processes
3) Alarms linked to an employee's performance, progress report, task assignment, timesheet, leave, incident, end-of-probation assessment, etc. Once a transaction triggers an Employee Alarm, the system sends an alert email to the supervisor, manager, and/or HR department, depending on the relevant workflow configuration.

54. Event Management

Event Management is a powerful self-service module that allows Organization Unit users to create events and invite participants from across the company to attend. The application allows the user to indicate the purpose of the event, the timing and venue, as well as any other information useful for attendees. Invitees can be chosen from the list of employees by Organization Unit or by Employee Group. Once selected, they will be notified both by email and through their employee self-service. Employees can then either accept or reject the invitation. The event organizers can track how many employees have confirmed their attendance and make their plans accordingly. Attendees can also provide additional comments and feedback upon accepting the invitation. The list of events is available online for any employee who is eligible to attend. The invitation can also include information about the event organizers and external sponsors.

55. Meeting Management

This module can be used to schedule meetings, invite participants, distribute agendas and track meeting minutes. Invitees find meeting details on their Self-Service portal, where they can also accept or decline the invitation. The meeting venue can be chosen at the time of scheduling the meeting. Meetings can be linked to specific Organization Units, Clients or Projects.

56. News Management

News Management allows departments and organization units to make news announcements and share it with the entire company. All news items appear on the employees' Self-Service portals. The publisher can edit or unpublish announcements if required. Employees can comment on news announcements. These comments can be configured to require approval by the department making the original announcement.

57. My CV

My CV allows employees to create their own resume and update it whenever required, so it can be used by the company for bidding on projects and for any other relevant purpose. It is primarily useful for companies that employ consultants used for client projects and contracts. The system can be configured to require HR approval of internally published resumes before they are available for use.

58. My Intro

My Intro allows employees to create a page that introduces them to their colleagues. It is especially useful for new employees who wish to share something about themselves with their new colleagues, and helps existing employees to introduce themselves to the new hires. This personal page can includes a welcome statement and free-form text sections about the employee's prior job experience, current projects, career aspirations and a direct message to peers and colleagues. The application also allows the employee to choose what type of information can be shared with others, including name, marital status, job title, picture, email address, manager name, age, office phone, country of birth, cell phone and a URL to a personal blog.

59. My Contacts

This module allows the employee to create a short list of key contacts within the company and have a personal phonebook that includes a picture as well as job title, location, phone and cell phone, email and other details about the contact. It functions as a personal address book for the employee for quick reference. All details are directly linked to the companywide employee directory which can be searched at any time.

60. Organization Unit Self-Service

This module enables each Organization Unit to conduct its HR-related work electronically, including position budgeting, issuing recruitment requisitions, review of employment offers and employment contracts, timesheet review and approval, employee performance reviews, disciplinary actions, health & safety management, resource scheduling, leave management, probationary period plans, employee housing and even payroll and HR actions. The application streamlines HR services and helps eliminates paper-based HR forms.

General Features

- MyPage for the Organization Unit
- Position Budget Worksheet submission
- Recruitment Requisition Issue and Tracking
- Applicant Search
- Applicant to Requisition Auto-Match Notification
- Applicant Interview Scheduling
- Applicant Interview Recommendation
- Employee Performance Review Request
- Employee Performance Reviewer Assignment
- Employee Appraisal Recommendations
- Employee Timesheet Review and Approval
- Employee Leave Request Review and Approval
- View employee record
- View employee HR Actions
- View employee performance review history
- Schedule employee training
- Track employee career plan implementation progress
- Visa Request Review and Approval
- Edit Organization Unit Policies and Procedures
- Publish Organization Unit Policies and Procedures

61. Applicant Self-Service

This module allows an Applicant to first create an Applicant Profile, Log In using the Applicant Self-Service credentials provided, and update his/her Profile. The Applicant can Apply for Jobs, review Job Descriptions, upload documents, and view the Interview Schedule. He/she can also communicate with the HR department using email, and receive Job Offer letters and Employment Contracts. After Acceptance, the Applicant can receive Pre-Boarding and/or Onboarding documents to be filled in online.

62. External Recruiter Self-Service

This module allows external Recruiters to register and set up their profiles and create contracts with your Company. Your HR department can then assign approved Requisitions to specific Recruiters who will be able to upload resumes against these Requisitions. Once the Recruitment process is completed and Applicants have been hired, the Recruiters can generate Invoices for their services, based on the Contract Terms.

63. Client Self-Service

This module allows External Clients to log in and approve Timesheets for which they will be billed by the Company, and review resumes of Employees being assigned to their Projects. Client Self-Service can also give Clients the ability to communicate with you, their service provider, regarding other items such as Order Change Requests.

Talent Management

Executive Summary

The Talent Management Suite consists of multiple modules including

- Competency Management
- Performance Management
- Progress Reporting
- Training Management
- Training Evaluation
- Succession Planning
- Career Planning

Using these modules, you can define a competency framework and configure it so that employees put together personal annual plans that consist not only of goals but also of the competencies on which they will be measured.

The Competency Management module allows the user to conduct a job analysis which will lead to a job evaluation that shows which competencies are required at which level for a particular job. Employees can then be evaluated based on the competencies relevant to their respective jobs. This information will give the organization very powerful tools for finding employees that best fit a particular combination of competencies, or those who best matches the competency profile of specific Job.

As a result of a competency-based performance appraisal, managers and other 360-degree evaluators may find that an employee is lacking in certain required competencies. In that case, the system can recommend training courses that are already defined in the system as needed for developing a certain competency to a certain level. This means that, based on the Gap Analysis which results from a competency evaluation, specific training courses can be automatically recommended and added to an employee’s training and/or career plan.

Whenever employees attend training, they can provide relevant feedback through the Training Evaluation module, which can be configured to collect feedback on any facet of the training including the training institute, the trainer, the content and much more.

Once detailed data is available and competency evaluations have been conducted for all employees, the organization will be in a good position to do meaningful succession planning. By defining critical positions in the system and flagging them as needing a succession plan, the user can ensure that no critical position is left unmonitored. A succession plan request will be defined for each critical position, which will include a short list of potential successors for that particular position. These successors will be those in the organization who exhibit the correct competencies (or at least come close) and have the highest score in terms of matching the competency profile for that position.

Employees who have been identified and shortlisted on the succession plan will require more frequent monitoring, and a detailed career plan which includes any type of activities and may be saved to the competency workbench, where additional evaluations and appraisals will take place.

In addition to the formal appraisal process, Interact HRMS also supports ongoing progress reporting as well as continuous or quick feedback provided by supervisor and advisors any time throughout the year.

64. Job Classification

This module is a comprehensive job classification system that supports both grade and point classification systems, combined with an extensive set of attributes that cover basic and general job information definition, Salary & Grade Information for budgeting purposes, Education Requirements, Skills Requirements, Certification Requirements, Experience Requirements, Interview Questions associated with the particular job, Training Courses associated with the Job, Hay-method Job-Evaluation, and Competencies required to do the Job.

The byproduct defining jobs through system is a Job Catalogue that uniquely defines all jobs used by the organization. The job catalogue allows all job information and associated controls and rules to be inherited by all Interact HRMS applications. A detailed Job Description can be defined for every Job, and Jobs can be grouped by Job Group, Job Class, Job Category, Industry, Occupation or Workers' Compensation Classification.

General Features

- General Job Definition including Job Title, Multiple Category definition, Industry, Specialty, Grade and Step Classification, minimum and maximum salary
- Education Requirements with multiple education requirements
- Skills Requirements supporting the definition of multiple skills
- Experience Requirements
- Job Description which can be uploaded or entered manually
- Identifying whether the Job requires orientation, training, or specific certification
- Definition of both primary and secondary responsibilities
- Identifying whether the job is a management or supervisory job
- Job catalogue definition at the enterprise level with automatic inheritance by Employer
- Separate Job Catalogue/Classification for each employer
- Job Catalogue/Classification is shared by all Interact HRMS applications
- Unlimited number of jobs in the Catalogue
- Multilingual Job Catalogue
- Granular Job search
- Job Classification Review linked with the Workflow engine
- Jobs can be Activated, Inactivated and Reactivated

65. Competency Management (iCompetency)

iCompetency is a tier-based competency management system that enables the organization to define a structured model of competencies using up to nine tiers, ranging from general competencies to specific occupation and job competencies. Once defined, you can conduct Job Competency Analysis to identify the competencies required for each job. The competency profile of each Job will contain the Competency, the Proficiency Level, the Importance Scale, the Urgency Scale and the Value Scale of each Competency. This provides excellent tools for granular management of jobs and their respective competencies.

When employees are evaluated on their Competencies, an automated Gap Analysis shows which Competencies are missing and which ones are not at the required proficiency level. The system can then be queried using Best Fit and Match Job searches, allowing the user to find those employees who have been confirmed to possess the requisite competencies based on a user-defined Best Fit profile or a predefined Job Profile (Match Job).

Employees who are identified through the Best Fit or Match Job analysis can then be shortlisted and saved onto the Competency Workbench. This allows the user to work with the shortlisted and High Potential employees, conduct further evaluations and create for them detailed Training, Career and Succession plans.

Through the integration with the Training Management module, the application will suggest which training is appropriate to help an employee further develop a particular competency which the employee is deemed to be lacking in as determined by the employee competency evaluation.

The Competencies Management module is seamlessly integrated with the Job Classification, Career Planning, Training Management, Performance Appraisal, and Succession Planning modules.

66. Training Management (iTrain)

iTrain is a comprehensive training management system that is seamlessly integrated with other Interact modules such as iPerformance, iContract, iCareer, iSuccession and iCompetency. The basis for the iTrain abstraction model is that an employee is trained to develop certain skills or knowledge that are required for a specific job, either already assigned to the employee or to be assigned to him/her in the future.

The training business process workflow that is supported by iTrain is based on the Gap Analysis Model, whereby an employee is assigned or to be assigned to a job that requires specific skills and knowledge/proficiency levels. The employee is assessed to determine his/her skills and proficiency levels as they pertain to the job. Comparing the employee’s skills and knowledge level to the job requirements determines the Gaps.

The Gaps determine which training courses the employee needs to take in order to meet the job’s skills and proficiency requirements. You then develop the Training Plan for the employee, taking in to account his/her time availability. The training courses are then scheduled, and the employee registers for the training, after which a post-training assessment of the employee is conducted. Gaps are determined again, and the training plan is updated. Training plans can be initiated by the employee and reviewed/approved by the supervisor. Training courses can be requested online through Self-Service. iTrain tracks detailed training history of all employees.

67. Training Evaluation

This module is designed to allow the user to define a set of sections, question subjects within each section and any number of questions within these question subjects. This framework is entirely configurable and all content can be set up as per the user’s need. These sections, question subjects and questions can be used to evaluate the training, the trainer, the training institute, the trainee and any other relevant items. Users can provide feedback through Self-Service using free-form text, scores or multiple-choice / radio buttons.

Questions can have their own importance level. A separate approval workflow is available to supervisors, managers and trainers. Any number of user-defined default Training Evaluation Actions can be set up and chosen by the user as a result of the evaluation. For example, users can choose to recommend "Repeat Training with Same Instructor" or "Repeat Training with Different Instructor".

Powerful reporting is available to ensure that all feedback is properly captured, reported on and can be used for decision making about future training engagements and planning.

68. Performance Management (iPerformance)

iPerformance is a 360-degree goal-based evaluation system with user-defined performance appraisal/evaluation dimensions and associated elements/factors. The first dimension in the appraisal process is the employee's performance plan for the year, where specific goals are defined. These goals are aligned with the organization's annual plan. Additional performance appraisal dimensions and associated factors such as competencies, Hay factors, and/or internal factors can be defined as well. The system automatically generates performance evaluation forms with multiple evaluation dimensions and elements. Each evaluation block/section can be assigned to a different employee/supervisor for assessment and recommendations.

The system allows for multiple evaluators per evaluation, an unlimited number of evaluations per employee, and predefined evaluation activities through the workflow with auto-notification. Specific actions can be taken following the performance appraisal, such as training and development, career planning, new job assignment, on the job training, coaching, salary increase, grade change, demotion, promotion, etc.

iPerformance is a 360-degree goal-based evaluation system with user-defined performance appraisal/evaluation dimensions and associated elements/factors. It allows users to create their own framework so as to support the existing methods being used within the organization, and to capture all the information required for different models that apply to various Employee Groups, Organization Units, Job Classes and Job Categories within the company.

In the Performance Model Setup, the user can define the specific framework and model which will be used to drive Performance Reviews in the organization. This includes whether a Performance Plan is required (Planned or Unplanned), which Dimensions will be used in a typical Performance Review (Goals, Competencies, Career Factors, Hay Factors, Internal, or other User-Defined elements) and much more. The user can also link Organization Unit Strategic with Performance Goals and other Goals related to a specific Fiscal Period.

The Appraisal Cycle can be standard (Monthly, Quarterly, Yearly) or user-defined. It may be linked to specific projectss, in which case appraisals may take place throughout the year, when projects are completed or specific milestones are reached.

Through the use of Self-Service, Performance Plans can be prepared and appraised as a standard requirement by the Employee, the Supervisor, or the Manager. However, anyone else in the organization can be assigned the responsibility to perform a specific task within the overall Performance review cycle and as such have the ability to either design or approve a Performance Plan or Appraise an already Approved Performance Plan and subsequently Approve the Appraised Performance Plan.

The flexible design of Interact HRMS allows you to define a specific Measurement Standard which will then cascade throughout the application and apply to all Performance Paramaters which are defined. However, the User has the ability to make any changes required to support a different Measurement Standard at the individual Parameter level at any time.

In addition to a standard Performance Plan, Interact HRMS also supports the definition, tracking and appraisal of Engagement Plans. Engagement Plans are designed around specific Projects or Clients.

Employees working in consulting or project management industries typically get specific assignments that are linked to a particular client or project which should be reviewed separately from the standard Performance of the Employee’s regular work within the Organization.

Specific Performance Goals are grouped within Performance Goals Groups. These Groups allow for the creation of a clear model and framework which can then be applied to large numbers of Employees throughout the Organization.

You can select the Sequence in which each Performance Goal Group will appear in the Performance Plan, accept or change the Overall Score and Rating standards, and assign a specific Weight within the Same Dimension of the Group.

Using the Interact HRMS Performance Model framework, the user can define specific Performance Goals which will automatically be listed in the Performance Plan of a specific Employee, depending on the Dimension and Goal Group to which the Goal is assigned, and depending on the Job Group, Job Class and Job to which the Employee is assigned. This method enables organizations with a large number of employees to leverage the system to quickly create Performance Plans that are based on the organization’s rules and policies.

When creating a Performance Plan, the main Goals, which have been pre-defined by the user as part of the Performance Plan setup, are displayed under the relevant Goal Group and are color-coded to enable users to quickly distinguish them based on their own internal setup.

At this stage, Employees, Supervisors and Managers can collaborate and edit the Performance Plan by adding new Goals, modifying existing Goals and/or selecting additional Goals from a pre-defined list of Sample Goals. When modifying the existing Goals, users can enter the Benchmark (Expected Achievement), the Expected Achievement Date and the Key Activities that needed to achieve the Goal.

iPerformance is seamlessly integrated with other Interact applications including Career Planning, Training Management, Competencies Management, Succession Planning, and Compensation Management.

69. Career Planning

This module is designed to support Career Planning over a 6-year period. For this period the user can define an employee’s individual goals, objectives and activities. Each goal can have an unlimited number of objectives and each objective can have an unlimited number of activities. The goals, objectives and activities can be presented on a Gantt chart and will be set up with planned start and end dates. The completion of each activity, objective and goal can be tracked with detailed comments and completion percentage.

Career Plans can be set up for different purposes, including to build competencies, achieve certification, prepare an employee for succession, prepare an employee for a new job, develop skills/knowledge, or any other purpose.

Employees will be assessed based on their achievement against their Career Plan and will have input and feedback through the Self-Service portal on the progress against their Plan.

Career Planning is seamlessly integrated with all other modules in Interact HRMS which relate to Talent Management, so that training courses, competencies, goals, etc., can all be linked up as required.

70. Succession Planning

This module tracks critical jobs/positions that require succession due to retirement, termination, or other termination actions, and facilitates identifying internal employees or external applicants who can be prepared for succession. For internal employees, career plans can be set up to prepare the employees for assignment to the positions/jobs that are upcoming for succession.

Succession Planning allows the user to shortlist any number of potential successors for a position/job. It's driven by a workflow that starts with a Succession Request issued by a manager, employee or HR user. A Succession Plan is created once the Succession Request is approved, which leads to further steps for the shortlisted potential successors, including further competency evaluation, career planning, performance appraisal, and training and development.

71. Progress Reporting

In addition to the regular performance review process which falls under performance planning, employees and supervisors can also follow a progress reporting process, whereby employees provide regular updates throughout the year. The progress reporting is done within a framework that allows the user to define a list of Progress Activity Types, Piecework Units and Piecework Units of Measure. Within this framework, employees can report progress on any activity, and indicate what has been achieved for each Piecework Unit Type based on its Unit of Measure.

Employees can report daily, weekly, monthly or any time they feel it is useful to do so against a specific action plan. These reports can be linked with specific clients, projects and organization units. The entire framework is very flexible. For example, salespeople can report on sales, consultants can report on projects and billable hours, and hourly employees on the shop floor can report on items produced or piecework completed.

Progress reports are available for the supervisor and for any other user with proper authorization.

System Modules

72. System Manager

The System Manager module defines Granular Access Control and Security Settings, Multicurrency, and Enterprise Level settings that apply to all Employers. It manages master tables that are shared by all companies in the system, and provides a powerful application-based Backup and Restore process.

73. Web Services

Web Services are used to integrate Interact HRMS to third-party applications such as job boards, recruiting systems, benefit carriers, and other external applications that deal with Payroll or HR. Interact HRMS Web Services are HR-XML compliant, allowing for easy, out-of-the-box integration with any other HR-XML compliant application.

74. Alert Management

This module is used to alert users of specific conditions that have met. Alerts are user-defined and can be set up to be sent by email, SMS, and on the MyPage of the Employee. The condition that will trigger an Alert can include every data element in the database.

75. Workflow Management

Basic Workflow is included in the standard functionality of many modules, but advanced Workflow requires the Workflow Management module. For example, if you need additional approval levels or steps for a specific HR Action, Workflow Management will allow you to define not only which users will be involved in the HR Action, but also what rules/criteria they should consider when approving/rejecting that specific Action.

76. Active Directory Management

This module allows you to integrate Interact HRMS with your Active Directory and other LDAP-compliant Single-Sign-On solutions. This integration will ensure that new employees hired in Interact HRMS will automatically have a new user ID created in Active Directory and vice-versa.

77. Email Management

Interact HRMS offers its own Email client for managing emails with external users (Applicants, Clients, etc.) that you want to keep filed separately from all other emails. All parties can communicate securely through the email messaging system this way.

78. Chat Channel Management

Chat Channels can be a powerful way of communicating with Employees and using Bulletin Boards for specific announcements. Any number of Channels can be created and used not only for HR and Payroll purposes but also by other departments. All communication through Chat Channels can be archived for future reference. Chat Channels can be accessed through Employee Self-Service at any time.

79. Helpdesk Management

This comprehensive ticket-based helpdesk/support desk management system can be used by HR and Payroll departments to assist Employees with questions regarding any HR/Payroll function. Employees can submit their Helpdesk Requests (which can be prioritized based on importance) through Self-Service, which will automatically generate a Support Ticket. Support Tickets can then be assigned to specific Employees who will be responsible for resolving the Ticket. When the issue is resolved, the Ticket is closed, the Employee who submitted the ticket is automatically notified by email, and Service-Level KPIs are updated.

80. Mass Updates

This module is used to process updates that apply to groups of Employees in a single step instead of multiple manual updates. You select your target group based on any number of criteria, including Organization Unit, Employee Group, Age, Gender, Seniority, and more. The specific transaction or parameter change are then applied to all relevant Employees.

Reporting and Analytics

81. KPI Dashboard

The KPI Dashboard comes with 100 Key Performance Indicators specific to HRMS. KPIs are visible to Managers, Organization Unit Heads, Administrators and any other individual who should be aware of Performance and Quality in the Organization. KPIs are generated live from the database and are refreshed every time they are opened. The lists of KPIs included in the KPI Dashboard and the KPI Summary are shown in Appendix A and Appendix B, respectively. Note that additional KPIs can easily be added.

82. Report Management

Interact HRMS provides business intelligence to its users in two ways: reports and KPIs.

The list of reports included in this document is non-exhaustive, as reports are added on a weekly basis based on client requests. 2interact's policy is to include all standard and custom-built reports in every new release, so that all clients have access to the same reports and so that the new reports are guaranteed to work with the new release.

Each report is designed with many parameters and filters, resulting in dozens of potential versions of the same report. These parameters and filters are context specific: for example, reports related to Payroll will always include filters by employee group, organization unit, pay period, year, and currency (if applicable), whereas reports related to talent management will include filters for employee group, organization unit, job group, job category, job class and more.

All reports in Interact HRMS can be exported to Excel, PDF, Word, CSV and XML.

Reports are available at primarily two levels within the application: The Employer (company) level and the Organization Unit level. This reflects the powerful architecture and design of the application, which ensures that data can be managed at all levels of an organization no matter how complex or simple the organization structure.

Report access can be configured for an individual user to include only data related to a specific set of employee groups or organization units, and is designed so that a user running a report logged in under a specific employer or organization unit will be able to view only data relevant for that employer or organization unit (or those units which report into this organization unit). Below is a count of the standard reports and KPIs included with the system:

Employer-Level Reports	(557 reports)
Organization-Level Reports	(74 reports)
KPI Dashboard	(76 KPIs)
KPI Summary	(24 KPIs)

Detail lists of the Employer-Level and Organization-Level reports are shown in Appendix C and Appendix D, respectively.

83. Ad-Hoc Report Writing

Using JasperSoft iReport or other Report Writers capable of connecting to a MySQL database, users can design their own reports as they please and produce any graphic output required. All database tables and fields in Interact HRMS have long descriptions, which helps users understand the meaning of each one of them.

Vertical Solutions

84. Grant Management

For Research and Not-For-Profit Organizations that track Salary/Labor Cost for specific Grant-funded Projects, the Grant Management module allows for defining unlimited number of Grants, Donors and Grant Agreements. Unlimited Grant Budget Categories and Budget Items can be defined and ultimately linked directly to the Payroll. This allows Employees to allocate time worked against specific Grants/Projects. The Budget is automatically adjusted as Payroll is run. In addition, the system alerts the user if there are no more funds left for a Project and an Employee is trying to book cost against the Project.

85. Residency Management (iResidency)

Residency Programs in Continuing Medical Education programs are managed through iResidency which allows for the creation of Residency Plans, where Residents can define their Rotations and Training Segment Schedules. For example, Radiology Residents can be assigned Radiology Exam Orders and respond to Quizzes related to Radiology Cases. End-of-Rotation Performance Evaluations and Scheduling of Rounds, etc., can all be managed through Self-Service for Residents and Consultants.

Appendix A: KPI Dashboard

In addition to the long list of reports available in Interact HRMS, the application provides powerful dashboards and KPIs that are available out of the box. Below is a list of these KPIs.

Productivity

1. Labor Cost vs Revenues
2. Revenues Generated by FTE
3. Unit Production per FTE
4. Labor Utilization Rate
5. Quality Reject Rate / Employee Errors
6. Customer Complaints
7. Project / Deliverables Delays
8. Employee / Deliverable Delays Ratio
9. Pending Payments Due to Delays per FTE

Jobs / Positions

10. Jobs Utilization
11. Job Cost Distribution
12. Succession
13. Career Planning
14. Turnover

Recruitment

15. Position Budget
16. Vacant Positions
17. Open Requisitions
18. Recruitment Time
19. Recruitment Cost
20. Relocation Cost
21. Applicants/Applications
22. Retention % New Hire vs LOS
23. New Hire vs 1st Performance Appraisal

Human Capital KPIs

24. Distribution
25. Distribution by Project
26. New Hire
27. Inductions/Probations
28. Terminations
29. Transfers
30. Promotions
31. Turnovers
32. Exits – Organization Wise
33. Voluntary Exits
34. Involuntary Exits
35. Division Wise Exits
36. Experience Wise Exits
37. Head Count
38. Organization Wise Count
39. Experience Wise Count

40. Gender Wise Count
41. Workforce Turnover Report
42. Workforce Headcount Report
43. Organization Wise Exit Interview Count

Budget / Remuneration

44. Budget / Cost by Organization Unit
45. Budget / Cost by Project
46. Budget / Cost by Compensation Type
47. Total Cost by Pay Period
48. Variances
49. Provisions & Accruals

Leave

50. Scheduled Leaves
51. Unscheduled Leaves
52. Leave Distribution
53. Leave Cost
54. Sick Leave
55. Lost Time Distribution
56. Accrued Leaves
57. Carryover Leaves
58. Workforce Absenteeism Reasons

Time

59. Regular Time, Overtime & On Call
60. Absent Time Distribution
61. Lost Time
62. Time Comparison by Pay Period
63. Labor Distribution
64. Workforce Utilization Report

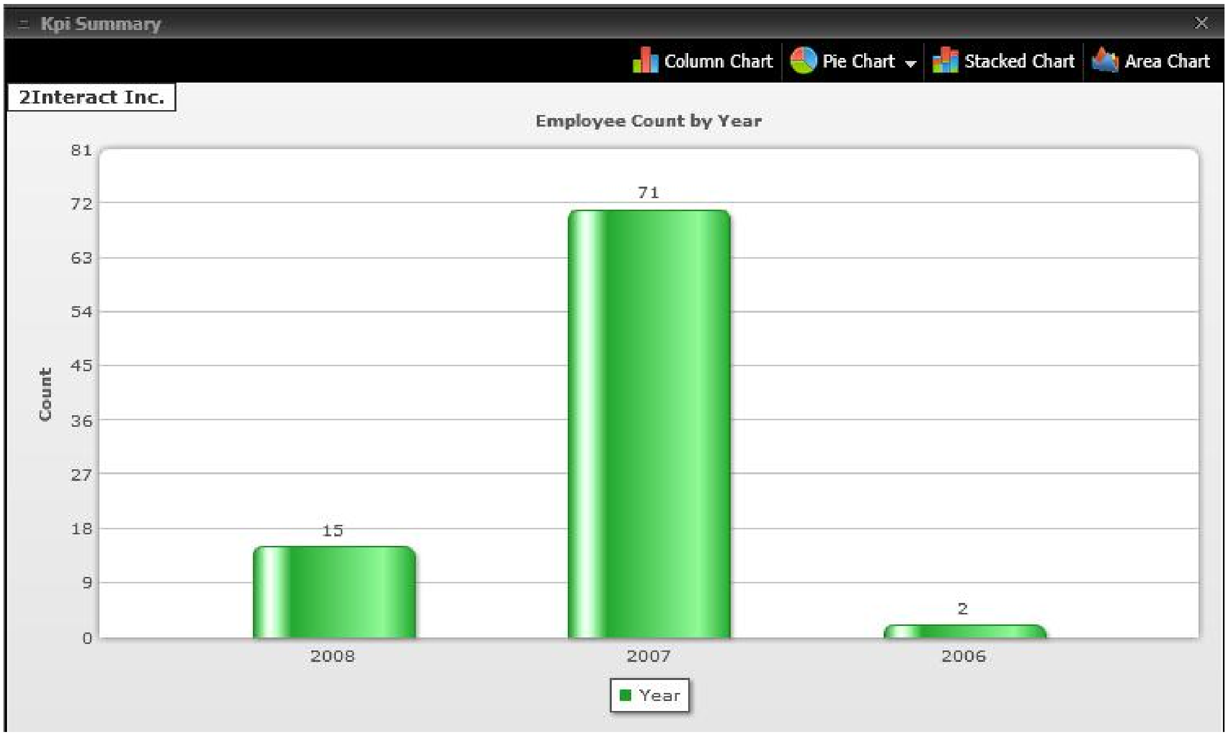
Training

65. Planned Training
66. Training Cost
67. Training Hours per Employee
68. Training Course Satisfaction
69. Training Course Attendance
70. Training Outcome Assessment
71. Internal Vs External Training
72. Learning Centers

Incidents & Injuries

73. Employee Reported Incidents
74. Injuries
75. Lost Time Due to Injuries
76. Cost of Injuries

Appendix B: KPI Summary



In addition to the KPI dashboard, a KPI Summary is always displayed at the employer and organization-unit level. Several graphic representations of the data can be selected with a single click. KPIs included with this Summary are:

1. Total Employee Count
2. Year to Date New Hires
3. Year to Date Transfers
4. Employees on Leave Next Month
5. Year to Date Promotions
6. Year to Date Total Lost Hours
7. Total Organization Units
8. Total Activity Line Staff
9. Total Active Employees
10. Year to Date Voluntary Terminations
11. Year to Date Applicants
12. Turnover Rate
13. Employees with Performance Plan
14. Year to Date Total Productive Hours
15. Employees with Health Plan
16. Total Active Supervisors
17. Total Inactive Employees
18. Year to Date Involuntary Terminations
19. Employees on Leave
20. Year to Date Incidents
21. Employees with No Performance Plan
22. Year to Date Absent Hours
23. Employees with No Health Plan
24. Total Active Managers

Appendix C: Employer-Level Reports

Competency Management

1. Competencies Report
2. Competencies Cross Reference Report
3. Competencies Hay Factors Cross Reference Report
4. Job Task Cross Reference Report
5. Employee Competency Evaluation Report

Organization Management

6. Employees by Cost Center
7. Employees by Employee Group
8. Employees by Job Title
9. Employee Position Assignment Report
10. Head Count by Function
11. Manpower Distribution Report
12. Manpower Distribution by Nationality
13. Organization Employee Cross Reference
14. Organization Units
15. Organization Unit & Reporting Structure
16. Organization Wise Employee Count by Gender
17. Organization Offshore Report
18. Organization Wise Manpower Report
19. Non-Assigned Job List Report
20. Employees by Organization Unit
21. Organization Structure Change Report
22. Manpower Headcount Summary Report

Job Classification

23. Job Classification by Education Level
24. Job Classification by Skill
25. Job Classification Report
26. Job Current Employment Statistics Summary
27. Job Reclassification Report
28. Management & Supervisor Job Report
29. Job Turnover Rate Report
30. Job History Report
31. Labor Allocation Report
32. Employees by Industry

Position Budgeting and Control

33. Position Budget by Fiscal Year
34. Position Slots Report
35. Position Status Report
36. Statistics by Grade & Nationality
37. Worksheet List Report

Timesheet, Time Clock and Attendance

38. Employee Pay Period Timesheets
39. Employee Overtime Pre-Approval Report
40. Employee Productive Hours Report
41. Employee Timesheet Detail Report
42. Employee Timesheet Summary Report

43. Employee Shift Schedule by Date Report
44. Labor Hours Summary by Activity
45. Overtime Monthly Trend Report
46. Timecard Transactions Analysis Report
47. Timesheet Exceptions Report
48. Timesheet Load Audit Report
49. Time and Attendance Report
50. Timesheet Status Report
51. Timesheet Uploads Report
52. Overtime Report
53. Overtime Report – Top Employees
54. Employee Timesheet Report
55. Employee Pay Period Daily Timesheet
56. Timecard Transaction Summary Report
57. Timesheet Status Summary Report
58. Employee Timesheet Load Status Report
59. Employees Requiring Clock Enrollment Report
60. Multi Transaction Summary Report
61. Clock Transactions Vs. Shift Report
62. Timecard Missing Transaction Report
63. Timecard Activity Summary Report
64. Attendance Detailed Report
65. iClock and Manual Transactions Report
66. Shift Assignments
67. Time Clock Reporting Audit Report
68. Daily Attendance Report
69. Time Clock Report
70. Employee Shift Schedule Report
71. Employee Timesheet Labor Distribution Report
72. Attendance Report
73. Overtime Rate
74. Time Clock Attendance Details
75. Time Clock Attendance Summary Report

Recruitment Management

76. Applicant Report
77. Employee Arrival by Recruitment Agency
78. Job Vacancy by Organization Unit
79. Local Recruitment
80. Overseas Recruitment
81. Offers Made
82. Offers Total
83. Division Wise Offers
84. Monthly Wise New Joiners
85. Division Wise New Joiners
86. Requisitions
87. Candidate Pipeline Report

Leave Management

88. Accrued Leave Balance Summary Report
89. Air Ticket Destination Report
90. Annual Airfare Payout
91. Annual Leave Report
92. Employee Consecutive Days Report

93. Employee Leave Request History
94. Employee Leave Request Report
95. Employee Leave Return Report
96. Employee Leave Summary
97. Employee Leave / Absence Report
98. Employee Approved Leave Request Report
99. Leave Accrued Report
100. Leave & Airfare Tickets Provision Report
101. Leave Balance Adjustment Report
102. Leave Balances Report
103. Leave Cost Report
104. Leave Policies by Employee Group Report
105. Leave Policy Statistics Report
106. Leave Settlement Form
107. Leave Request Detail Report
108. Personnel Leave Report
109. Recuperation Leave Details
110. Leave Details
111. On Leave for Period
112. Overstay Report
113. Absenteeism Report
114. Leave Salary Report
115. Leave Balance Detail Report
116. Annual Leave Summary Report
117. Unpaid Leave Report
118. Leave Starting Balance Report
119. Leave Requests Audit Trail Report

Contracting and Hiring

120. Active Employee List Report
121. Annual Salary Report
122. Annual Increment Report
123. Birthdays
124. Employee Phone / Email Directory
125. Employee Process Action
126. Outstanding Contracts

Employee Contracts & New Hire

127. New Hire Report
128. List of Contract Type Military Employees
129. List of Contract Type Employees by Group
130. Employee Contract Report
131. Employee Contract Details
132. Contract Amendment Report
133. Contract Amendment Compensation Detail Report
134. Contract Anniversary Date
135. Civilian Employees Contract by Employee Group
136. Inactive Contracts Report
137. Employee Contact Report
138. Employee Status Report
139. Temporary Employee Report
140. Contract Summary Report
141. Employee Joining Details
142. Employee Count by Recruitment Source

143. New Joiners
144. New Joiners Detail Report
145. New Hires Summary
146. Contract Amendments Summary
147. New Hire Report Adjustment
148. Contract Amendment Pay-Rate Change Report

CNSS

149. CNSS 211A Report
150. CNSS 2AA Report
151. CNSS 41A – 1 Report
152. CNSS 41A – 2 Report
153. CNSS 452 Report
154. CNSS NA Report
155. CNSS NA2 Report
156. CNSS NA3 Report

Employee Profile

157. Employee Dependents Report
158. Employee Education Details
159. Personal Data Change Form
160. Employee Wise Contract Details
161. Employee Profile Change History
162. Employee Demographic Details
163. Contract Employee Detail Report
164. New Hire Personal & Job Details
165. Employee List by ID & Name
166. Staff List by Organization
167. Employee Data Report
168. Employee – Dependent Data Report
169. Employee Organization, Contract & Job Assignment
170. Employee Experience Report
171. Employee Education Report
172. Employee Emergency Contact Report
173. Employee Personnel Data
174. Employee Summary Data
175. Employee Passport, Visa & Labor Card
176. Personnel Detailed Listing
177. Personnel Listing by Shift
178. Personnel Summary by Department
179. Personnel Summary by Business Unit
180. Registration Report
181. Health Worker Insurance and License Compliance Report
182. Visa and Labor Card Report
183. Certificate Expiry Report
184. Employee Biodata Report
185. Employee Baseline Record Report
186. Employee IDs Cross Reference
187. Employees Requiring Timesheet

Statistics and Counts

188. Employees Monthly Master List
189. Employee List by Nationality
190. Nationality Count

191. FTE Statistic by Nationality
192. List of Physicians Employees by Group
193. EEO-1 Report
194. Employee Count by Nationality and Gender
195. Organization Wise Count
196. Organization/Project Wise Count
197. Head Count by Job Group
198. Head Count by Employee Group
199. Head Count by Job Title
200. MD Rejected Transaction Audit Report
201. MD Data Summary Audit Report
202. MD Data Track Changes
203. Employee Count by Organization Unit/Project Wise/Cost Center
204. Head Count as per Job Title
205. Master Data Report
206. Organization Wise Head Count by Employee Group
207. Annual Head Count Report
208. Employee Count Variance Report
209. Employee Turnover Rate

Terminations, Transfers & Renewals

210. Employee Termination by Job Category Report
211. Employee Termination by Nationality Report
212. Employee Termination Reason Report
213. Transferred Employees Report
214. Contract Termination Report
215. Contract Renewal Report
216. Leavers Report
217. Summary of Transfer
218. Termination Count by Month
219. Termination Count by Employee Group
220. Attrition Report
221. Deleted Employee List Report
222. Deleted Employee Report
223. Employee Termination Reasons Summary
224. Contract Renewals Summary

Performance and Promotion

225. Employee Career & Performance Profile
226. Employee Promotion Report
227. Employee Promotion Compensation Detail Report
228. Merit Increase & Salary Change Report
229. Summary of Promotion
230. Summary of Promotion Grade

Probation Periods

231. Probation Assessment
232. End of Probation
233. Probation Period Report
234. Personnel Summary by Probation

Tenure & Seniority

235. Seniority / Retirement Report
236. Seniority Salary Variance Report
237. Seniority Tracking Report

Staffing & Scheduling

238. Staffing Schedule Report
239. Staffing Summary Report
240. Daily Staffing Level

Cost Analysis

241. Employee Cost Code Cross Reference
242. Manpower Cost Report

Taxes and Social Security

243. Employees NIS & TRM Number Report
244. Employees Tax Exemption Report
245. R3 Report
246. R3-1 Report
247. R4 Report
248. GOSI Report
249. Employee WPS/MOL Details
250. Social Security Registration Data
251. BIR Registration Data

Payroll and Compensation

252. Payroll Register Detail
253. Payroll Register Excluded Employee Details
254. Payroll Register Report
255. Payroll Register Sage Format
256. Payroll Register Summary
257. Payroll Register Summary with Bank Details
258. Payroll Register Work Days
259. Payroll Detail Report
260. Payroll Detail Report by Cost Center
261. Payroll Detail with Adjustments
262. Payroll Distribution Report
263. Management Payroll Summary
264. Advance Salary Report
265. Payroll Comparison Detail Report
266. Payroll Compensation Summary Report
267. Payroll Cost Summary Report
268. Payroll Net Salary Report
269. Deduction Listing Report
270. Earning & Deduction Comparison Report
271. Payroll NPC/OCP Register Report
272. Payroll Register Denominations
273. Payroll Detail Distribution
274. Negative Pay Detail Report
275. Negative Pay Report
276. Payroll Hourly Detail Report
277. Monthly Bonus Paid
278. Threshold Report
279. Payroll Register Detail by Organization

280. Payroll Salary Register Details Report
281. Payroll Salary Comparison Report
282. Payroll Register Detail by Employee Group
283. Payroll Register Summary by Employee Group
284. Employee Payroll Register Report
285. Payroll Register Detail in Multi Currency
286. Pay Periods Calendar
287. Monthly Payroll Register
288. Net Pay Summary Report
289. Payment Summary Report
290. Deductions Report
291. Payroll Register Report

Pay Slips

292. Pay Slips
293. Payroll Payment Authorization Memo
294. Pay Slip Report without Currency Conversion
295. Send Pay Slip Message

Earnings and Benefits

296. Basic Salary Audit Report
297. Basic Salary Change Report
298. Benefit Contribution Analysis Report
299. Benefit Contribution Detail Report
300. Benefit Contribution Difference Report
301. Benefit Contribution History Report
302. Benefit Deductions Report
303. Employee Contribution Detail – Organization Wise
304. Monthly Benefit Contribution Summary
305. Yearly Benefit Contribution Report
306. Yearly Benefit Contribution Summary Report
307. Year to Date Earning Report
308. Savings Scheme Enrollment Report
309. Staff Benefits History
310. Staff List by Specific Benefits
311. GOSI By Nationality
312. Pension Contribution Report
313. Benefits by Cost Center Report
314. YTD Balance Report
315. Third Party Benefits & Deductions
316. Benefit Distribution Report
317. Employees IRS Report
318. Pension Contribution List – Permanent

Allowances

319. Allowance Report
320. Allowances & Deductions Summary
321. Annual Allowance Report
322. Monthly Allowance Detail
323. Deferred Allowance Adjustment Report

Deductions

324. Monthly Deduction Detail
325. Total Deduction Summary Report
326. Termination Payroll Deduction Enquiry
327. GESPP Deductions Report
328. Social Security Deductions Report

Labor Allocation & Distribution

329. Labor Distribution Cost Detail Report
330. Labor Distribution Report
331. Payroll Allocation by Cost Center report
332. Payroll Allocation by GL Code
333. Payroll Allocation Sheet
334. Employee Cost Allocation Report

GL / JV

335. Cost Center Wise GL/JV Report
336. Employee GL Accounts Audit Report
337. GL Payroll Ledger Posting Summary Report
338. GL / JV Detail Report
339. GL Account Definition Audit Report
340. GL Accounts – GL Codes & Missing Definitions
341. Project / Job / Activity Based JV Posting Summary
342. Drilldown Report
343. Accounting Voucher Printing
344. Posted Accounting Entries
345. GL / JV Detail by Cost Center Report
346. Employees with Missing GL Accounts
347. GL Tax Report
348. GL Cost Distribution Summary

Taxes & Social Security

349. CNSS 190A Report
350. CNSS 215A Report
351. CNSS 207 Report
352. CNSS 342 Report
353. CNSS 386 Report
354. Employers Quarterly Federal Tax Form
355. End of Year Tax Slips
356. Income Tax Detailed Report
357. Income Tax Summary Report
358. Income Tax Withholding Report
359. NIS Report
360. R10 Report
361. R5 Report
362. S1 Report
363. Service Record Detail Report
364. Social Security Contribution Report
365. Social Security Detailed Report
366. Social Security Pension Retirement Fund Report
367. Social Security Statutory Report
368. Social Security Summary Report
369. Social Security Withholding Report
370. P.A.Y.E. Employee

371. P.A.Y.E. Summary Report
372. Tax Deduction Card Report
373. Tax Summary Report
374. Employee Pay Report
375. Net Pay Register Report
376. Monthly Savings Plan Contribution Report
377. 1601-C Form
378. 1604-CF Form
379. 2316 Form
380. Tax Rate Tables Report
381. Alpha List of Employees
382. Tax Calculation Method Trace
383. SO2 Extract Report
384. Employee P4 Report

Overtime Payment

385. Overtime Payment
386. Overtime Report
387. Overtime Report – Top Employees
388. Monthly Overtime & Shift Earning Report
389. Overtime Transaction Report

Banks & Accounts

390. Employee Bank Details
391. Bank Wise Salary Details
392. Bank Wise Salary Statement
393. Variance Report – Banking Master Data Changes
394. DBT Distribution Requests
395. Net Pay Distribution
396. Bank Transfer Detail Report

Audit & Reconciliation

397. Employee Profile Audit Report
398. Salary Change Report
399. Employee Status Change Report
400. Monthly Comparison Report
401. Pay Period Additions/Deductions
402. Pay Period Payroll Variance Report
403. ATS Audit Report
404. Compensation Effective Pay Period Audit Report
405. Compensation Change Audit Report
406. Difference Between Two Payrolls Report
407. Payroll Initial Balances Report
408. Payroll History Report
409. Average Salary by Job Title Report
410. Compensation Policies Employee Group Report
411. Employee Payment Method Audit Report
412. Employee Supervisor Report
413. Employees Excluded from payroll Due to Leave Report
414. Payroll Pivot Report
415. Payroll Reconciliation Detail Report
416. Payroll Exception Posting Status Report
417. Payroll Reconciliation Report
418. Payroll Reserves Current Month Report

419. Payroll Run Audit Report
420. Payroll Status Audit Report
421. Payroll Summary Audit by Cost Component
422. Payroll Reserves Up To Date Report
423. Monthly Annual Leave Provision
424. Pay Period Salary Variance
425. Monthly Payroll Reconciliation Report
426. NPC Run Status Tracking Report
427. Compensation Change Audit Trail
428. NPC Variance Report
429. Payroll Run Variance by Organization Unit

Checks, Cash & Deposits

430. Check Cash Breakdown
431. Check Listing Report
432. Deposit Listing Report
433. Third Party Payment Detail Report

Investment Funding

434. Funding Billing Agency Report
435. Investment Fund Accumulated Amount Details
436. Investment Fund Employee Contribution Report
437. Investment Fund Monthly Contribution Details

Off-Cycle and EOS

438. EOS Report
439. Off Cycle Payroll Detail Report
440. Off Cycle Payroll Pay Slip
441. Bonus OCP Report

Salary Advances & Loans

442. Payroll & Loan Detail Report
443. Regular & Exceptional Advances Report
444. Manual Salary Advance Report
445. Salary Advance Report

Payroll Summary

446. Payroll Summary
447. Payroll Summary Distribution
448. Payroll Summary with Adjustments
449. Payroll Transaction Summary Report

Philippines Payroll

450. Membership Remittance Form
451. Monthly Remittance Schedule
452. ER2 Report
453. ME5 Report
454. RF1 report
455. ML1 Report
456. ML2 Report
457. R1A Report
458. R3 Report
459. R5 Report
460. SSS-R5 Report

461. Pag-Ibig Registration Data
462. DOLE Report
463. Master List Report
464. ATM Payroll Register Report
465. Paycheck Installment Report
466. Third Party Loan Deductions and Payments
467. Salary and Allowance Report
468. Installment Obligation Report

Miscellaneous Payroll

469. Salary Summary Employee Wise Report
470. Master Roll Project Wise Report
471. Master Roll Employee Wise Report
472. Man-Hour Report
473. Contribution Summary Employee Wise Report
474. Employee Wise Gross Salary Summary Report
475. Salary Summary Project Wise Report
476. Denomination Statement Report
477. Contribution Summary Project Wise Report
478. Employee Payment Details Report
479. Hourly Summary Employee Wise Report
480. Project Wise Detailed Working Hours Report
481. Detailed Working Hours Report
482. Installment Obligation Report

Payroll

483. Payroll Register
484. Certified Payroll Report
485. Active Employees by Cost Centers
486. Terminated Employees by Cost Centers
487. Gross Pay & Overtime Report
488. Employee Compensation by Cost Center Report
489. Scheduled Benefits/Deductions Report
490. Allowed & Taken Report (Vacation/Sick Balances Report)
491. Labor Allocation Report
492. Active Employees & Rate Type Report
493. Benefit/Deduction Census Report
494. Union Census Data Report
495. Labor Hours Report
496. Labor Hours Distribution Details Report
497. Pay Period Checks
498. Employee Benefit / Deduction / Tax Report
499. Earnings Hour Report

Cost Centers

500. Cost Centers List

Career Planning

501. Career Plan by Employee Report
502. Career Plan Supervisor Summary Report

Training

503. Training Catalog Report
504. Course Schedule Report
505. Employee Training Registration Report
506. Employee Training Report
507. Training Cost Detail Report
508. Training Cost Summary Report
509. Training Statistics Report
510. Training Statistics by Course Report
511. Accredited Training for All Employees
512. Training Course by Employee
513. Training Course Instructors Report
514. Employee Training Hours Report

Performance

515. Goal Cross Reference Report
516. Performance Plans List
517. Counselor/Counselee Cross Reference Report
518. Performance Plan Tracking Report
519. Performance Plan Selected Competencies Report
520. Client Engagement Tracking Report
521. Performance Appraisal Tracking Report
522. Client Engagement Appraisal Tracking Report

Indemnity Payments

523. Indemnity Payment Request Status
524. Indemnity Payments Register
525. Investment Fund Setup
526. Indemnity Report from Date of Joining
527. Indemnity Report for the Year

Health & Safety

528. Work Related Injuries & Illness Log Report (OSHA Form 300)
529. Summary of Work Related Injuries & Illness (OSHA Form-300A)
530. Phil Health Registration Data

Loans

531. Monthly Loan Deduction Details
532. Loan Deduction Report
533. Loan Transaction Report – Employee Wise
534. Loan Transaction Summary Report
535. Employee Loan Agreement
536. Loan Outstanding Report
537. Monthly Loan Deduction Employee Wise

Third-Party Payments

538. Third Party Deduction Report

Housing

539. Housing Units
540. Assigned Housing Units
541. Vacant Housing Units

Passport & Visa

542. Passports Expiry Report
543. Visas Expiry Report
544. Visa Report
545. Residency Report
546. Passport/Visa Sponsor List

Travel

547. Travel Request Report

User Management

548. User Access Matrix report
549. Password Change Audit
550. User IDs List
551. User Report

Projects

552. Project Personnel Detailed Listing
553. Project Adherence Report

Residency Management

554. Residency Applicants
555. Applicant Interview Roster
556. Applicant Assessment Outcomes

Setup

557. Foundation and Policies Setup Report

Appendix D: Organization Unit-Level Reports

Interact HRMS provides powerful Self-Service functionality at the Organization Unit level. An Organization Unit can be anything defined as such by the employer, including a division, branch, department, section, project, activity, etc.

Using Self-Service at the Organization Unit level, authorized users can manage HR functionality and inquire about information that is relevant to a specific project or a specific department or branch. This means that instead of having to request the corporate HR department to provide this information, it can be obtained directly with the click of a button.

Different users within a Unit can be given different types of functional and data access. Therefore, a Unit Head can be given access to view all new-hire information and reports, whereas a secretary may be able to view only absence or attendance reports for that particular unit.

Below is the list of the standard reports available to users with Organization Unit-level access.

Job Classification

1. Nationalities – Organization Wise
2. Job Classification Report
3. Management & Supervisory Job Report
4. Job Reclassification Report
5. Job List by Educational Requirement
6. Job Report by Skill Requirement
7. Job Turnover Rate Report
8. Job Current Employment Statistics Summary

Position Budgeting

9. Management Grade Personal Data
10. Employee Salary Grade
11. Status Report – Position Wise

Recruitment

1. Total Overseas Recruitment
2. Total Local Recruitment
3. Applicant Report

Leave & Time Management

4. Employee Absence Report
5. Accruals Report
6. Employee Leave Request List
7. Employee Leave Summary
8. Annual Leave Report
9. Accrued Leave Balance Summary Report
10. Timesheet Audit Report
11. Air Ticket Destination Report
12. Employee Leave Return Request Report
13. Timesheet Upload Report
14. Timecard Transaction Analysis Report

Contracting & Hiring Report

15. New Hire Report
16. Nationality Count

17. Probation Assessment
18. Transferred Employees
19. Personal Data Change Form
20. Contract Anniversary Date
21. Inactive Contracts Report
22. Outstanding Contracts
23. FTE Statistics by Organization Unit
24. FTE Statistics by Nationality
25. Leavers Report
26. Employee Status Report
27. Employee Termination Reasons Report
28. Contract Civilian Employees Report by Employee Group
29. Contract Type Military Employees Report
30. Contract Type Employees Report by Group
31. Physician Employees Report by Group
32. Employee Contact Report
33. Contract Termination Report
34. Contract Renewal Report
35. Employee Promotion Report
36. Contract Summary Report
37. Contract Amendment Report
38. End of Probation Report
39. Employee Profile Change History

Visas and Passports

40. Visa Report
41. Passport Expiry List Report
42. Visa Expiry List
43. Residency Report

Housing & Accommodation Management

44. Housing Units
45. Assigned Housing Units
46. Vacant Housing Units

Payroll

47. Payroll Detail Report
48. Payroll Summary Report
49. Pay Slips
50. Payroll Register Summary
51. Employees Pay Slip Report
52. Payroll NPC/OCP Register Report
53. Pay Slip Report without Currency Conversion
54. Average Salary Report by Job Title
55. Overtime Payment
56. GL Payroll Ledger Posting Summary Report
57. Payroll Run Audit Report
58. Payroll Transaction Summary Report
59. Salary Advance Manual Report
60. Funding Billing Agency Report
61. Labor Distribution Cost Detail Report
62. Termination Payroll Deduction Enquiry
63. Project / Job / Activity Based JV Posting Summary