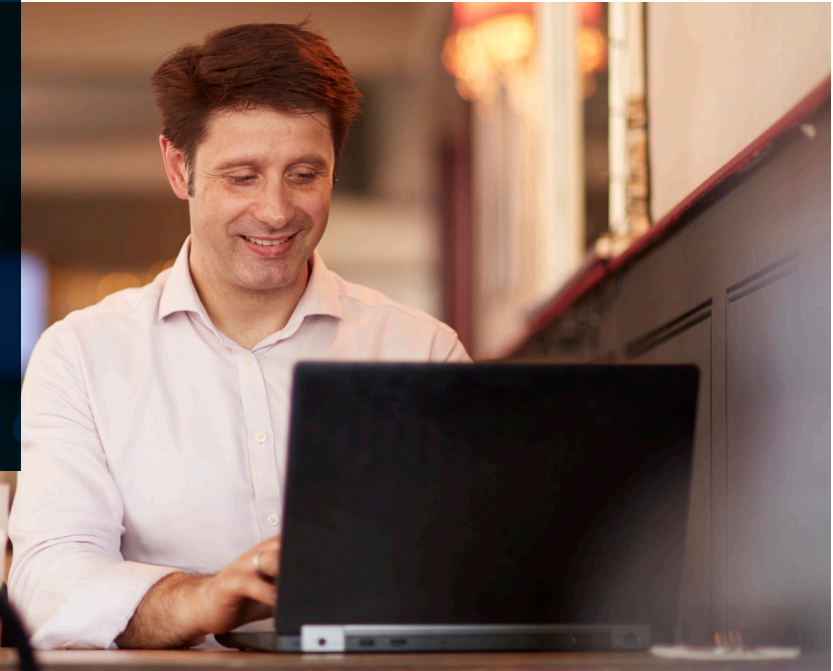


SAGE HRMS

HR ACTIONS

## Factsheet

By Delphia Consulting



Streamline the collection and approval of employee data using the web. Sage HRMS HR Actions, a Sage Endorsed Solution, lets you easily create paperless forms using any fields from Sage HRMS. Process any action from request to hire to termination and everything in between, including status changes and performance appraisals. Save time, money, and paperwork with an online manager and employee self-service.

Interactive web-based forms replace paper forms, are easy to use, and result in submitted actions that are complete, accurate, and secure. Automate the routing, approval, and notification process of employee actions.

Empower managers and improve service with online access to real-time information, including employee personnel files. The Sage HRMS HR Actions dashboard gives managers and HR visibility and control of actions throughout the workflow process.

### **Accelerate HR and payroll transactional processing throughout the employment lifecycle**

- Eliminate paper forms
- Updated forms are immediately available to the organization
- Electronic routing and approval of forms speed the service delivery process

### **Keep employee information available and up to date across the enterprise**

Provide managers online access to direct and skip-level reports' personnel files, including completed forms and attachments

### **Eliminate data entry from paper forms into Sage HRMS**

One approved, one-click updates to Sage HRMS eliminate data entry from paper forms

### **Enforce company policy while minimizing errors**

- Forms are easy to complete, with fields that only display appropriate choices
- Specify what fields must be complete for a form to move on to the approval process
- Forms are routed for approval based on business rules you define in a point-and-click environment

### **Monitor and control forms throughout the entire routing process**

- A real-time dashboard lets you see the status of every form being routed throughout the organization
- Control the flow of a form –stop it, skip an approver, or push it through the approval process

### **Reduce HR's dependency on IT support**

HR can define and build dynamic web-based forms and routing rules without any programming skills

## Benefits

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**Web-based self-service** - Managers and employees can initiate forms for their reports or themselves over the Internet or intranet.

**Improve data quality** - Dynamic forms provide interactive fields and cross-field validation to ensure the right information is captured on every form.

**Form workflow** - Business rules unique to parts of your company or to specific forms ensure business processes are always followed consistently.

**Visibility** - See the status of every form in the organization at any stage of the approval process.

**Control** - Impact the status of any form at any point during the workflow process.

**Customization** - Your company can customize pages with graphics and color schemes that reflect your company brand.

**Available with** - Sage HRMS and Sage Abra Suite.

Features	
Manager self-service	Sage HRMS HR Actions can automate nearly every manager-initiated personnel action including hiring requests, promotions, transfers, pay changes, job changes, and termination requests. Managers can initiate forms for their direct and skip-level reports. Forms for existing employees show current values side by side with fields to enter the requested changes. Managers are notified by email of forms needing approval and can see the status of a form or cancel it while it is being routed for approval.
Employee self-service	Sage HRMS HR Actions can automate the collection of data directly from employees using employee-initiated forms such as skills, previous employer updates, and time-off and leave requests. Employees can complete self-appraisals and complete the final sign off after meeting with their supervisors.
Performance appraisal	Sage HRMS HR Actions automates the most complex performance appraisal process. Create as many different forms as needed. Appraisal forms can include any combination of instructions, competency ratings, review questions, goal setting, development plans, narrative responses, rating scales, and weighting. Sage HRMS HR Actions supports self-appraisals, manager appraisals, and unlimited back and forth between the employee and manager before routing for additional management and HR approvals.
Easy-to-use form builder	A wizard guides HR administrators through the process of building dynamic forms using any field from Sage HRMS, including custom fields. Start with one of the two dozen sample forms provided with Sage HRMS HR Actions or build a new form from scratch including dynamic fields, read-only fields, file attachment areas, instructions, and section headers.
Flexible routing based on business rules	The Sage HRMS HR Actions workflow engine is designed to meet your business needs, so you don't have to change your business processes to match a fixed workflow. Without any programming, you can define business rules that delineate how many approvals are required and the sequence of the approval chain. Routing rules can be based on individual forms, business units, or the type of change being requested. Approvers can be any number or combination of HR executives, supervisors, or an unlimited number of named role-based approvers.
Real-time monitoring and control	Managers and HR have real-time visibility into the forms being routed for approval. It is easy to see who has approved forms, where bottlenecks exist, and to view the content of forms wherever they are in the process. HR can control the flow of any form at any time by advancing it to the next approver, pushing it through the entire approval sequence, or canceling the form. HR controls the final update of Sage HRMS for each approved form.
Detailed audit trail	Every form has a permanent, detailed audit trail with time-stamped information about its submission, approvers' actions and comments, edits to the data made while routing for approval, and the final dispensation of the form.
Security	Sage HRMS HR Actions uses advanced security and data encryption to keep your confidential employee data safe and secure. Advanced security settings prevent unauthorized access to data.
Customization	Sage HRMS HR Actions is easy to configure to reflect your company's processes and policies. Create an unlimited number of form templates and robust approval sequences, and route an unlimited number of forms for approval. In addition, Sage HRMS HR Actions comes with over 400 configurable fields, enabling the capture and routing of pertinent employee data that can be used along with the data that is saved to Sage HRMS.
Eliminate data entry	Full integration means that Sage HRMS HR Actions can display and update standard and custom fields in Sage HRMS. Code tables from Sage HRMS populate the pick lists on forms. Forms dynamically display the current values of data stored in Sage HRMS side by side with the proposed values requested by the form initiator. Once a form has been approved and reviewed by HR, one click updates the data in Sage HRMS.