A CFO’s Guide to Human Resource Management Solutions

Driving Critical HR Business Processes

Q3 2014 | Featuring insights on...

» Building a Case for HRM Solutions
» Overcoming HR Challenges
» HRM Universe
» Key Drivers for HRM Automation
» Selecting a HRM Provider
» Leading HRM Provider Profiles

Underwritten in part by

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Contents

Introduction ............................................................................................................. 3
Building a Case for HRM Solutions ................................................................. 5
HR Challenges ...................................................................................................... 7
HRM Universe ...................................................................................................... 9
Key Drivers for HRM and Payroll Automation .................................................. 12
Selecting a HRM Provider .................................................................................... 14
Conclusion ........................................................................................................... 16
iCIMS Profile ..................................................................................................... 17
Kronos Profile .................................................................................................... 22
NetSuite Profile .................................................................................................. 27
Recall Profile ...................................................................................................... 31
About PayStream Advisors .................................................................................. 35
Introduction

For some time now, PayStream Advisors has witnessed the growing trend towards increasing the CFO’s role as it relates to human resource management (HRM) and payroll. Human resources (HR) plays a critical role in organizational growth, performance, and profitability, and CFOs are becoming advocates for making HR a field driven as much by analytics as by finance. Given today’s war for talent, combined with increasingly numerous and complex employee regulations and compliance obligations, positioning HR as an important contributor to organizational success can prove a difficult task without implementing an HRM solution.

HRM solutions transform HR departments into a source of permanent strategic advantage by providing real-time access to integrated workforce and business data, robust reports, organizational transparency, and unparalleled power to deliver business insight and drive critical HR business processes. While today’s business environment is increasingly automated, many small to medium-sized enterprises (SMEs) are beset by wasteful manual processes and outdated HRM and payroll solutions. In fact, according to a recent Paycor survey of more than 1,400 SMEs, 51 percent of SMEs still store employee data in multiple spreadsheets, and 54 percent are manually tracking hours.

Manual or antiquated HRM systems increase the possibility of inaccurate data, which is troublesome for compliance procedures. For multinational enterprises that have witnessed a merger or acquisition, the likelihood of multiple, non-integrated systems exacerbate data quality risks. System functionality further complicates the situation by hindering the creation of data-rich, real-time reports for decision-making purposes. Without the ability to capture real-time business information, companies can’t accurately assess the strategic and financial impact of business intelligence. Companies that invest in technology for tasks such as payroll, time and attendance, and benefits administration spend 18 percent less than organizations that rely on paper, according to PricewaterhouseCoopers.

as a guide for CFOs interested in exploring Payroll and HRM solutions. This report will illustrate how those solutions support automation and integration, enable the business through analytics, focus on accuracy and compliance, and improve business performance. The report includes the benefits of payroll and HRM solutions, current challenges, technology trends, and things to consider when selecting a payroll and HRM provider. In addition, the report profiles leading payroll and HRM solution providers.

1 Stacey M. Browning, “5 Ways to Capitalize on HR Technology Trends,” Paycor, April 11, 2014.

2 The hidden reality of payroll & HR administration costs,” PWC, January 2011.
Today’s CFOs are under pressure to help their organization make better-informed decisions. Implementing a single-solution payroll and HRM application helps reduce the overall cost and complexity of managing one of the company’s most important resources – its employees. A company’s workforce drives growth and performance, and the company’s success is intrinsically linked to the workforce’s skills, talent, knowledge and ability. But unlike the physical assets that CFOs value, measure, and manage, people can be difficult to control and predict. Calculating total compensation costs (those related to wages, benefits, social security, Medicare and taxes) can be even harder to predict without the proper tools. Having real-time access to important business metrics provides a clear line of sight to the total cost of HR, from which CFOs can set goals and measure results.

Analytics provide a powerful platform for collaboration between finance and HR. Consistent and mature data helps CFOs make informed decisions, identify opportunities and risks, and understand the drivers of performance in the business. “Analytics help companies gain greater visibility into how key aspects of HR affect corporate performance,” says Mike Maiorino, CEO of HRMS Solutions, a leading provider of HR, payroll and talent management solutions. “HR analytics help companies increase the effectiveness of the recruitment process, strengthen retention of employees, manage HR risks and provide a more objective, rigorous approach to performance management. Human capital management systems that incorporate robust analytics within their solution are no longer seen as a way to automate just transactional processes, but play a more vital role in the strategic direction by allowing executives to drive performance across the organization.”

The HR landscape is constantly evolving, and most SMEs simply don’t have the bandwidth to stay current with changing needs. Payroll and HRM solutions are designed to help CFOs achieve real and measurable results by generating benefits including:

- Establishment of leading HR processes and access to defined workforce data in a cost-effective, scalable model that allows for future growth
- Enhanced ability to manage talent pools on a more cost-effective and competitive basis
- Creation of an efficient support structure for employees and their company related to improved HR processes
» Money-saving reduction in manual processes to support transactions such as hiring, salary approval, transfers, and raises
» Creation of real-time visibility into staff levels, competencies, and talent gaps
» Increased data privacy – both for employees’ data during employment and for company data when an employee leaves the organization
Disparate or manual HR systems can lead to complex challenges for companies tied to these inferior processes. According to a PricewaterhouseCoopers survey, the majority of large and mid-size organizations lack systems to manage key HR functions (see Figure 1).

Challenges associated with disparate or manual HR systems include:

» **Meeting compliance obligations** – Operating on multiple, separate systems can lead to magnified complexity. When a lack of standardization exists, companies run the risk of limited compliance reporting or non-compliance. The possibility of failing to fulfill Sarbanes-Oxley requirements is large.
» Cumbersome timekeeping – It’s hard to believe that in today’s technological age, many SMEs rely on manual timecards to capture employee time. Managers are often manually creating and maintaining employee schedules and tracking overtime and time off through spreadsheets or paper processes. This results in paycheck errors that can snowball into poor employee morale and decreased productivity, while also inviting infractions for failing to comply with labor regulations.

» Manual performance management processes – When performance management processes such as employee reviews are mired in paperwork, there is an increased risk of employee disengagement. This breeds unproductive behaviors, which directly and negatively impact the company’s bottom line. In addition, outdated or manual performance management processes yield incomplete or inaccurate assessments of a company’s talent capabilities and potential. This can open a door to new hazards for career planning and succession.

» Manual payroll processes – For many SMEs, antiquated or manual payroll processes and systems predominate, to the financial detriment of the business. These outdated payroll processes require manual labor to collect payroll data and interact with the General Ledger (GL). Limited system flexibility makes it difficult to make needed adjustments, and when employees or financial executives have questions, they have to contact the payroll department, wasting valuable time that could otherwise be strategically or tactically invested in the company.

» Manual HR processes – Many HR practices in SMEs rely on paper-based processing with storage in multiple locations, making access to these documents troublesome and time-consuming. Paper processing is also prone to errors and often compromises HR’s ability to deliver timely reports. When HR professionals are bogged down in administrative tasks, archaic legacy systems, and time consuming processes, they are unable to deliver strategic value to the company.
HRM Universe

PayStream defines HRM and payroll solutions as applications that help manage people and payroll. For the purpose of this report, the core functions of HRM and payroll solutions are defined as follows:

**HR and Benefits Management** – This process encompasses actions associated with maintaining employee information and processing activities such as payroll, health and welfare administration, and other HR processes. HRM solutions simplify these processes, reduce redundancy, and deliver fast access to accurate records and reports. Key HR and benefits management features provided by HRM solutions include:

- **Employee Self-Service** – Permits employees to initiate routine tasks.
- **Online Open Enrollment** – Eliminates error-prone paper enrollment and has employees’ elections sent directly to payroll.
- **Benefit Carrier Connectivity** – Seamlessly transmits benefit enrollment changes in the HR application to the carrier.
- **Robust Reporting** – Standard and ad-hoc reporting provides critical information about HR.
- **Workflow Management** – Easily tracks workflow processes online. Schedules email alerts when approval is needed.
- **Employee Communication** – Quickly and effectively communicates important news through a secure employee portal.
- **Applicant Tracking** – Matches job applicants to open positions, identifies skill shortages, and manages requisitions.
- **Administration Training** – Schedules courses and tracks attendance for various sessions. Allows employees to enroll in courses online.
- **Audit Trails** – Tracks changes to important employee data fields while retaining previously recorded data.
- **Performance Management** – Maintains employee reviews, tracks promotions, and manages transfers.
- **Company Asset Tracking** – Tracks cell phones, laptops, and other company owned property.
- **Employee Development** – Maintains employee certifications, licenses, and training courses completed.
- **Workplace Safety** – Logs employee accidents and injuries.
- **Document Archiving** – Stores resumes, disciplinary notes, review forms, and more.
» **Organizational Management** – Easily visualizes the structure of the company by utilizing a dynamic company directory that includes direct report lists and photos.

**Payroll** – This is the process of collecting and entering data related to employee hours worked, determining taxation, calculating gross and net pay, and distributing compensation. Today’s best-of-breed payroll solutions automate this process and deliver much more than payroll—they encompass employee administration, payroll and time, and additional services such as workers’ compensation, retirement and tax credit services. Key payroll features that HRM solutions provide include:

» **Automatic Payroll Tax Filing** – Reduces the burden of filing federal, state, local, and school district payroll taxes.

» **Direct Deposit** – Simplifies reconciliation by drawing from the company account in one sum and depositing funds into employees’ accounts of their choosing.

**Figure 2**

*Human Resource Management Universe*

HRM solutions streamline and optimize the HR and payroll process.

**Time and Attendance** – This is the process of collecting, reviewing, submitting, and approving time reporting data, including employee hours worked and paid time off (such as vacation, sick and holiday, and leave balances). Time and attendance functionalities that are built into HRM and payroll solutions provide cost-effective labor management. Key time and attendance reporting features that HRM solutions provide include:
» **Scheduling** – Creates, views, or changes employees’ schedules quickly and easily.

» **Reports** – Shows a wide range of standard or ad hoc reports.

» **Configurable Rules** – Specifies company specific overtime, rounding, lunch and holiday rules.

» **Labor Distribution** – Allocates time quickly to different departments.

» **Employee Self-Service** – Empowers employees to access their time cards, request leave, review benefits, and view schedules online.

» **Leave Management** – Automates the administration of paid time off.

» **Corporate Policy** – Measures employees’ attendance and behavior and enforces corporate policies consistently.

» **Custom Benefit Accruals** – Automates complex rules for accumulating vacation, sick time, and other types of benefit accruals.

**Reporting/Analysis** – This process gathers accurate and timely HR data to make informed decisions on HR processes. Today’s HRM solutions are equipped with robust analytics tools that generate real-time workforce data which finance leaders can turn into actionable insights. Key reporting functionality features of HRM solutions include:

- **Detailed Analysis** – Allows quick access to data and reports for analysis and strategy planning.

- **Evaluation of Historical Data** – Shows trends in overtime, benefits, and much more.

- **Summarized Data** – Quickly accesses reports on paid time off, gross wages, overtime, or drills down by employee or department.

- **Reporting Across Calendar Years** – Allows users to report across calendar years, regardless of whether they sync up with fiscal years.

**Additional Services** – Additional services built into many HRM solutions include retirement, workers compensation, tax credit services, payment options, and more.
Key Drivers for HRM and Payroll Automation

PayStream analysts have identified five key drivers to HRM and payroll automation:

1. **Cloud-based technology** – Cloud or Software-as-a-Service (SaaS) solutions are dictating the adoption of HRM and payroll solutions in the SME market. Many SMEs are opting for cloud-based HRM applications rather than migrating outdated legacy HR systems and applications over to cloud infrastructure. These delivery models offer minimal implementation costs and make the technology providers responsible for maintenance and upgrades.

2. **Dependable data and analytics** – While “big data” is the trending catch phrase, what matters most is good data. The custom reporting tools built into today’s HRM and payroll solutions deliver real-time data that enables financial executives to make actionable decisions and drive better business performance. Reporting tools allow CFOs to view trends in historical data, create formulas for analysis, and summarize information quickly—all without help from IT.

3. **Reduced overhead** – By automating an outdated manual process, HR can realize its full potential in supporting profitable business growth. The tactical benefits of HR automation include user-defined payroll process controls, single-system data entry, time and attendance tracking, talent acquisition, and automated benefit enrollment and administration, to name a few. Aside from streamlining operational tasks that reduce cost and labor efficiencies, role-based access to HRM solutions deliver the right information to the right people. As a result, the C-suite is assured that the workforce is productively aligned with the company’s strategic initiatives.

4. **Compliance and risk management** – Adhering to complex state and federal regulations and meeting appropriate compliance requirements is no easy task. HRM solutions allow companies to track and audit compliance requirements, thus reducing risk and managing costs. The automation and integration of HR data, along with employee self-service visibility, significantly reduces risk and impacts compliance and payroll accuracy metrics.
5. **Employee self-service** – More SMEs are providing self-service access to HR data by implementing HRM and payroll solutions. Self-service tools allow talent to initiate routine tasks such as updating personal information, accessing timecards, requesting leave, and viewing schedules. This streamlines basic HR processes and allows HR associates to focus on organizational and operational benefits.
Selecting a HRM Provider

In addition to a solution’s features, it is critical to gauge each solution vendor’s level of expertise and product scope. Along those lines, companies will want to inquire whether HRM is a core application or a peripheral product in the vendor’s offerings. It is also important to understand the growth plans and future vision of the vendors a company evaluates. Asking the following questions will help a professional make an informed decision regarding which HRM solution is the best fit for their enterprise.

Company Overview

» How long has the vendor been in the business? When did they begin offering HRM solutions?
» Do they have experience integrating with the user’s HR system of record?
» How many customers does the company have and who are they?
» What is the vendor’s experience in the user’s industry?
» How is the vendor funded? (If it is a public company, read their prospectus.)
» How does the company intend to grow? Are there any mergers or acquisitions on the horizon?

Solution Scope

» Is the solution modular, scalable, and able to meet the demands of the user’s growing enterprise?
» Is the solution offered as a cloud-based solution?

Timekeeping Requirements

» Can the solution be automatically downloaded to payroll?
» Does the solution include employee self-service to request time off, view balances, view timecard, etc.?
» Does the solution have multiple clock options – swipe, proximity, biometric, online (via PC)?
» Does the solution have easy-access reporting capabilities for supervisors and administrators to pull department-level and employee-level information?
» Does the solution functionality include automatic holiday input based on the user’s company schedule?

Payroll Requirements

» Does the solution have unlimited earning and reduction codes with the ability to add and easily make changes?
» Can users access the solution from anywhere, anytime, with no real software or hardware requirements (other than a compatible web browser)?
» Does the solution allow for direct deposit, pay cards, and live check options?
» Does the solution have automatic new hire reporting with EVS (SSN verification) in each state?
» Does the solution allow the user to track and maintain all 401(k) YTD data (including employer match calculations, employee contributions, loans and eligible wages)?
» Does the solution allow for third party checks – FSA/HSA/etc.?
» Does the solution provide fully automated PTO tracking?
» Does the solution have instant gross-to-net capability, without having to transmit payroll data first?
» Does the solution track I-9 and verification fields with expiration date tracking?

» **HR Requirements**
» Does the solution manage employee records electronically with unlimited document storage on an employee record?
» Does the solution have configurable workflow functionality?
» Does the solution provide a portal for company communication and employee self-service?
» Does the solution provide talent acquisition including sourcing, recruiting, and onboarding?
» Does the solution manage performance reviews?
» Does the solution provide access to an employee directory and organizational chart?

» **Reporting Requirements**
» Does the solution allow for multiple export options: PDF, CSV, Excel, and HTML?
» Is the reporting functionality able to cross calendar years?
» Does the solution provide the ability to create formulas in custom reporting and create reports for all payroll and HR data, based on the fields within payroll and HR?

» **Tax Compliance and System Requirements**
» Does the solution include Affordable Care Act compliance assistance?
» Does the solution provide automatic updates for all federal, state, and local tax tables and global changes?
» Does the solution accommodate multi-state payroll per location, as well as W-2 filing and 1099 printing?
Conclusion

Effective HRM is critical to the success of any company, especially in today’s competitive business climate. The complex and ever-changing world of HRM is fraught with challenges that impact employee productivity, HR compliance, and ultimately, the bottom line. The value proposition of a unified, cloud-based HRM and payroll solution is a compelling means of driving profitable business results. The time is now for CFOs to make the investment in a comprehensive HRM and payroll solution that supports so much of what an organization does functionally—from payroll processing and tax filing to talent management and benefits administration.

The integration of financial and HR data provided by HRM solutions gives CFOs and other executive leaders visibility into, and control over, the company’s financial performance. Having access to real-time, unified financial and HR data is vital to an organization’s ability to power analytics and decision making. CFOs looking to get the greatest return on their technology investments in 2014 should turn their attention to a single HRM application with consolidated employee records and real-time data. As the total cost of ownership of processing payroll, administering employee health and welfare benefits, and managing other key HR systems and functions continues to increase, CFOs simply can’t afford to overlook HRM solutions and the benefits these solutions deliver to a company’s bottom line.
iCIMS Profile

Founded in 1999, iCIMS is a leading provider of innovative Software-as-a-Service (SaaS) talent acquisition solutions. The company’s mission is to help customers win the war for top talent by delivering best-to-market, pure SaaS solutions and a customer experience second to none. iCIMS’ Talent Platform enables organizations to manage their entire talent acquisition lifecycle from building talent pools, to recruiting, to onboarding, all within a single web-based application. With more than 2,500 customers worldwide, iCIMS is one of the largest and fastest-growing talent acquisition system providers with offices in North America, UK, and China.

Website: www.icims.com

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Solution Overview

Successful talent acquisition is no longer the reaction to monthly and yearly hiring needs. In an effort to win the war for best talent in today’s market, the best talent acquisition and HR practitioners are implementing talent acquisition solutions that deliver sourcing, recruiting, and onboarding applications that can keep pace with the rapid changes in industry trends,
technology, and the candidate landscape. The iCIMS Talent Platform delivers all this and much more, in a pure SaaS, single source code solution.

The iCIMS suite of solutions includes iCIMS Connect, iCIMS Recruit, and iCIMS Onboard. The solutions enable organizations to manage their entire talent acquisition lifecycle from building talent pools, to recruiting, to onboarding, all within a single web-based application. Due to the inherent scalability of iCIMS’ solutions, the company’s platform is flexible enough to meet corporations’ domestic and international recruiting efforts. Configurations can be made in any language, allowing users to complete fields in their native language to effectively meet recruiting goals. iCIMS offers multi-language support, including special character support for languages such as Arabic and Chinese. The solutions also support multiple international currencies and can be seamlessly integrated with other systems that provide screening, background checks, payroll, performance assessments, and employee data management.

The iCIMS Talent Platform supports mobile access for both recruiters and candidates on the go. All iCIMS-hosted Career Portals are mobile-optimized with responsive design to automatically provide the appropriate viewing experience whether the candidate is on a desktop, smartphone, or tablet. In addition to the device-friendly experience, candidates can upload their resumes or documents straight from their device, Google Docs, or Dropbox account. Due to the mobile-optimized Career Portals that come standard with iCIMS Recruit, the platform is the ideal tool to meet the mobile recruiting needs of businesses of all sizes. iCIMS is configurable enough to scale to meet the needs of larger, enterprise-level companies, and is priced on a sliding scale, making it affordable for small and medium-sized businesses as well.

iCIMS takes numerous security measures and utilizes SSL to encrypt user sessions across the internet. The company enables account and IP lockout capabilities to prevent dictionary password attacks. iCIMS also supports customizable password security options, SAML, and token-based SSO, so that a customer can require that their internal users authenticate against their own infrastructure—enabling custom two-factor authentication. To further enhance security, passwords are not stored in clear text, but in a non-reversible, one-way hash. Individual user permissions can expose or block access with granularity down to individual fields and tabs in the platform. Additionally, iCIMS can restrict access to platforms or portals to customer defined IP address ranges and offers PGP encryption for export files. The company supports SSL and SFTP for secure transmission of integration files. Emails are transmitted with TLS encryption, and access to customer data is restricted to access via the platform. VPN and direct database access is not offered to any customer.
iCIMS Core HR Applications

Recruiting and Applicant Tracking

iCIMS’ core product, Recruit, is an easy-to-use talent acquisition suite that empowers users to streamline processes, engage the right candidates, and make quality hires. Recruit provides users with the ability to showcase their organization’s job opening on job boards, mobile-optimized branded career portals, and social media, all within the iCIMS Talent Platform account. The solution also offers features that are attractive to candidates applying for jobs, such as the Social Resume and Social Apply functionalities. Social Resume allows recruiters to access real-time views of candidates’ social media profiles, in order to highlight current achievements and experiences. Social Apply allows candidates to expedite the application process by pulling relevant information from their current Facebook, LinkedIn, or Google+ profile into the online job application form.

To further enhance iCIMS Recruit capabilities, customers can purchase product add-ons including Job Board Posting, Career Site SEO, Social Distribution, and Video Screening. Job Board Posting gives recruiting professionals the ability to automate posting on multiple job boards and receive integrated posting analytics directly within the platform. Career Site SEO enables recruiters at both large and small organizations to better position their company to achieve top search engine rankings and garner more traffic to branded career microsites. Recruitment results of Career Site SEO are obtained through the use of .JOBS Career Microsites, which target the most relevant and high-quality candidates by placing appropriate job postings directly at the top of their online searches. Furthermore, iCIMS can incorporate any organization’s branding and multimedia content to create an integrated look and feel with the company’s primary corporate career portal. A social networking capability is infused into the microsites, allowing job seekers to connect with an organization using social media outlets such as Facebook, Twitter, LinkedIn, and YouTube.

The Social Distribution feature allows organizations to attract, recruit and hire the best talent through social networks with enhanced employee referral campaigns and automated job publishing. Utilization of the iCIMS Social Distribution tool allows users to build a social talent community and drive recruitment through branded, mobile-optimized social media pages. iCIMS also provides Video Screening, which offers a cost-effective method to streamline candidate screening with integrated video displayed within the candidate profile. With a single click, recruiters and hiring managers can send candidates a request to provide a video. Candidates can upload or record a short personal video showcasing why they are the best fit for the job. Candidates who choose to record a video can use their desktop’s
webcam or mobile device. Recruiters and hiring managers can then watch the videos to help identify and quickly sort through candidates to identify the best fit talent.

The iCIMS solution also includes new-hire onboarding capabilities. With iCIMS Onboard, HR professionals can transition candidates to new hires seamlessly. All the necessary new hire forms can be done online and properly processed by the recruiter. To avoid hiccups during the onboarding process, a user can elect to add the I-9 and E-Verify processes with paperless preparation, signing, management, auditing, and storage of I-9s, as well as automatic E-Verify submissions.

**Reporting**

The iCIMS Talent Platform includes a proprietary Reporting Center that offers users powerful searching and reporting capabilities. Every field within the platform, whether standard or custom, can be used to collect data for searching, reporting, and decision-making purposes. All reports generated by the iCIMS platform can be exported to Excel for further manipulation, or can be displayed as visual graphs within the system. The iCIMS Reporting Center is a comprehensive, intuitive tool that is extremely user friendly, delivering detailed reports for review within seconds. iCIMS Ad-Hoc Reporting Tools enable recruiters to create “on-the-fly” reports on any data within the platform, allowing users to further drill down, edit, save, and graph data queries. iCIMS Standard Reporting Tools offer a full suite of reports that focus on the collection and presentation of data as it relates to core recruiting metrics and the establishment of recruiting benchmarks required by today’s leading HR operations.

**Pricing and Implementation**

iCIMS’ implementation process is determined by the customer’s preference, the amount of products purchased, which products are purchased, and what types of integrations the client requires. Due to iCIMS’ highly configurable implementation process, the fee structure varies and is determined on a case-by-case basis.

iCIMS prides itself on creating a customer service experience second to none, which has resulted in a 97 percent Recurring Revenue Rate. The iCIMS iCARE™ Customer Support Team ensures a successful launch. Implementation Managers are the first touch point for new clients, working directly with clients to consult, configure, implement and train users on the iCIMS Talent Platform. Subject Matter Experts troubleshoot all client issues and are available to answer questions. In addition, each client is assigned a Client Relationship Director who focuses specifically on the customers’
iCARE experience, scheduling regular account reviews and proactive follow-up. Customer Solutions and Opportunity Consultants are responsible for follow up with iCIMS clients on enhancing their platform with new products and add-ons. iCIMS also has a team of Training Specialists that create Quick Guides, conduct live trainings, and craft all technical product documentation.
Kronos Profile

Founded in 1977, Kronos is a global leader in delivering workforce management solutions in the cloud. Tens of thousands of organizations, including more than half of the Fortune 1000, in more than 100 countries currently use Kronos to control labor costs, minimize compliance risk, and improve workforce productivity. Kronos’ industry-specific applications drive critical HR business processes including time and attendance, scheduling, absence management, HR and payroll, hiring, and labor analytics.

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Solution Overview

The Kronos Workforce Ready solution is a cloud-based hosted application. It is modular and scalable, making it a good fit for growing SMEs. Kronos is both SSAE SOC 1 and SOC 2 certified. Data security and compliance were central when Kronos developed their infrastructure. Workforce Ready is hosted in Kronos’ primary data center and a separate disaster recovery facility, to ensure both physical security of the data and a consistent uptime for their applications.
As a cloud-based solution, Kronos seamlessly adds new features and enhanced functionality every eight to ten weeks. Currently, the solution is available in multiple languages, including English (U.S. and U.K.), French (Canada and France), Spanish, and Dutch, and is available in the U.S., Canada, Belgium, the Netherlands, U.K., and Mexico. All Workforce Ready users have access to the mobile application that allows customers on the go to quickly access the applications from any mobile device.

**Kronos Core HR Applications**

**Recruiting and Applicant Tracking**

Workforce Ready makes applicant and job requisition tracking quick and easy. Clear and easy-to-navigate visual dashboards provide complete visibility into the entire recruiting process, and allow hiring managers to schedule interviews and communicate directly to applicants using configurable prebuilt email templates. Job applicants can quickly create an online profile in Workforce Ready and upload their resume through the candidate portal. All applicants receive an on-screen confirmation that their application was successfully received, along with a configurable email detailing the application process. Applicants can simply log back into the candidate portal at any time to check the status of the job they are seeking. Both job board integration and source tracking are also available in Workforce Ready. In addition, talent acquisition capabilities are available with Kronos Talent Acquisition. This feature allows candidates to apply by using their LinkedIn profile.

The Workforce Ready solution helps weed out applicants that do not meet minimum requirements with configurable prescreening questions. This allows recruiters and hiring managers to spend more time with those candidates that are more closely aligned with the company’s specific needs. Once an applicant is hired, the Workforce Ready new hire onboarding capabilities create a workflow of applicant data that flows into the new employee record. All the applicant information that has been entered automatically becomes part of their HR, timekeeping, and payroll record. Workforce Ready can deliver a configurable onboarding checklist to new hires with task assignments tracking the progress and completion of the onboarding process from beginning to end, ensuring no steps are missed in the process.

**Benefits Management**

Benefits administration can be a complex and time-consuming process. Workforce Ready makes it easy to set up, configure, modify, and manage
benefit plans with support for multiple plan types such as health, life, FSA, 401k, and others. Workforce Ready enables organizations to simplify open enrollment and life event changes by allowing employees to select and modify plans using self-service, significantly reducing HR's workload. Workforce Ready now provides more flexibility in benefit premium calculations, enhanced evidence of insurability, and more robust standard reporting capabilities including Benefit Census, Benefit New Hire, and Benefit Open Enrollment status reports which display an employee's status throughout the benefits enrollment process.

**Time, Attendance, and Scheduling**

Workforce Ready completely automates time and attendance by consistently and accurately enforcing pay and work rules, resulting in reduced labor costs. Labor-intensive and error-prone timecard tracking, data entry, and approval processing are simplified, reducing administrative time associated with attendance exceptions and employee inquiries. A variety of data collection options are available—the InTouch time clock, a mobile application, a telephony system, or a browser-based solution.

Configurable built-in workflows simplify routine tasks such as approving timesheets, correcting exceptions, and responding to time off requests. Real-time visibility makes it easy to manage exceptions, enforce work and pay rules, and update schedules for ongoing compliance and cost control. Workforce Ready Time Keeping automatically flags exceptions that violate company policies and immediately alerts managers so they can take the necessary actions. Complete automation eliminates timekeeping errors while real-time calculations help maintain compliance and payroll accuracy.

**Performance Management**

Workforce Ready delivers workflow automation for performance management, ensuring the proper process is followed for approvals, which improves the timeliness and participation of everyone involved in the performance management cycle. Unlimited performance appraisals can be configured, and multiple appraisals can be assigned to an employee, job, department, etc.; these can be configured with company specific competencies, scale or weighted scale. Automated review reminders can be sent to managers, employees, and HR to further streamline the approval process, and real-time monitoring allows managers and HR to view current status, disseminate automated notifications/reminders, and run status reports.
Payroll and Compensation Management

Workforce Ready seamlessly integrates with a variety of payroll systems, based on a customer’s specific needs. Workforce Ready Payroll simplifies the payroll process by providing quick access to the data needed to process payroll correctly, while automating processes like multistate and reciprocity calculations. The payroll module calculates precise taxes based on exact geographic coordinates, and includes all the information needed to complete and file tax forms. Payroll is continually updated in real-time, so there are no pre-processing steps. Benefit premiums automatically become payroll deductions in Workforce Ready Payroll.

Workforce Ready also includes default and configurable enterprise workflow for paid time off (PTO) and Family Medical Leave Act (FMLA). This helps drive consistent policy execution and more efficient processes. The latest release of Workforce Ready delivers out-of-the-box default workflows for new hire, termination, re-hire, promotions, demotions, transfers, and benefits enrollment.

Additional modules include Workforce Ready ACA Manager, the first and only solution on the market designed to provide proactive management of ACA compliance strategy across the entire workforce. It gives enterprises the tools needed to effectively manage regular and variable hour employee benefit compliance, along with applicable reporting.

Reporting

The Kronos Workforce Ready solution includes robust reporting functionality that delivers specific operational, financial, or staffing information needed in the exact format wanted. Custom and ad-hoc reports deliver valuable insights for making timely and informed business and HR decisions. The Kronos Workforce Analytics solution enables enterprises to easily access and leverage workforce data to identify, predict, and manage opportunities for cost savings and productivity gains. Key features include real-time visibility into workforce and operational issues, an intuitive, graphical management dashboard, and interoperability with an enterprises existing business intelligence tool, enabling enterprises to extend the value of their current investments.

Pricing and Implementation

The implementation timeline for the Workforce Ready Time Keeping module is 6 to 8 weeks and approximately 12 weeks for the full Workforce Ready suite. The pricing structure is based per employee, per month for the Time and Attendance/HR module. The Payroll and Tax Filing module is per pay
statement pricing, and per clock, per month pricing for clocks. In addition, limited implementation costs are added.

Training is included within the Workforce Ready product. In addition, Kronos provides telephone support Monday through Friday during business hours. Customers can also log questions online via the Kronos Customer Portal, which includes a self-service Knowledge Base for any technical support questions.
NetSuite Profile

Founded in 1998, and headquartered in San Mateo, CA, NetSuite provides companies around the globe with cloud-based, unified systems that deliver unprecedented capabilities to drive their business. Over 20,000 organizations worldwide rely on NetSuite’s solution for project management, resource optimization, project accounting, time and expense management, and billing and revenue recognition. Delivering end-to-end automation and visibility, NetSuite helps organizations large and small increase profitability, maximize billable resource utilization, and make informed, data-driven decisions.

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<td>Number of Customers</td>
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</table>
| Key Clients    | » NetSuite ERP: GoPro, Shaw Industries, and SolarWinds  
                 » NetSuite TribeHR: Magmic, VidYard, AMC Liquidators  |
| Target Verticals| Manufacturing, Wholesale Distribution, Retail, Services Industries, Software and Non-Profit |
| Partners / Resellers | See partner info at http://www.netsuite.com/portal/partners.shtml |
| Awards / Recognitions | NetSuite has won three 2014 SIIA CODiE Awards:  
                        Best Financial Management Solution, Best Project Management Solution and Best Commerce Solution |
| Solution Name  | NetSuite TribeHR |

Solution Overview

NetSuite TribeHR transforms HR departments and enables organizations to execute on its strategy. The solution combines the rich, traditional HCM capabilities needed to manage growing SMEs including recruiting,
core HRIS, and talent management, with an engaging social interface that encourages employee involvement and collaboration. NetSuite TribeHR's system of record for employee activity, coupled with NetSuite's single system of record for core operational business data, gives SMEs a modern platform to run the core aspects of their business with scalability, flexibility and agility of a cloud-based solution. NetSuite TribeHR is designed to inspire and motivate a modern workforce with employee self-service, mobile, social, and cloud at the heart of the system. The solution was specifically designed to enable employees to work with the system as much as possible. This dramatically reduces administrative time for HR personnel, allowing them to focus on more strategic initiatives.

NetSuite TribeHR is delivered as a Software-as-a-Service (SaaS) solution. Data fields automatically sync with NetSuite ERP, enabling NetSuite TribeHR to be the system of record for employee data. Performing salary reviews or promoting staff no longer requires double data entry. NetSuite TribeHR automatically keeps systems up to date in real-time, while synchronizing employee records. The NetSuite TribeHR single sign-on provides users with instant access to core HR, recruiting, and performance management applications, while increasing security, improving compliance, and providing operational efficiencies. Built-in security measures and operational best practice policies provide NetSuite customers with exceptional security, uptime and availability.

As a global solution, NetSuite has hundreds of currencies available. The solution also provides mobile access through the NetSuite TribeHR iPhone application. An Android application is in the pipeline and will be released in a future update.

**NetSuite TribeHR Core HR Applications**

**Recruiting and Applicant Tracking**

NetSuite TribeHR enables SMEs to create fully-customized online job boards that match the company website and branding initiatives. Applicants can quickly and easily apply for positions from the custom job board, by email, or from LinkedIn and Facebook. Built-in applicant tracking tools enable companies to organize interview teams, consolidate notes, rank candidates, standardize job descriptions, leverage social networks, and archive applicants. When an applicant is hired, NetSuite TribeHR automatically transfers all applicant data, including notes and documents, to the NetSuite TribeHR employee profile, thus saving valuable time rekeying and gathering data.
Time and Attendance

NetSuite’s TribeHR provides time and attendance tracking by consolidating a digital record of all employee files with a complete historical record. Managing time off requests and approvals is done automatically, and a current count of available time off is displayed on the employee dashboard. Employees can easily request time off from their desktop or mobile application, and NetSuite TribeHR tracks both their request and the manager’s response. Email notifications can be sent with a one-click approval link to the manager when time off is requested. Managers also have the ability to review, edit, reject, or approve requests within NetSuite TribeHR. The solution is extremely flexible, allowing companies to create multiple types of time off with distinct rules and parameters. Company default settings can be established that allow users to apply different rules for individual employees. NetSuite TribeHR integrates with the company calendar to enable better workload management across a team, department, and organization. In addition, NetSuite TribeHR reconciles accruals and usage, making it quick and easy to run payroll reports.

Performance Management

NetSuite TribeHR makes it easy to build a productive and powerful workforce by streamlining the goal-setting and measurement process, enabling peer recognition, and aligning employees with corporate values. Unlimited customized review templates can be created that automatically incorporate selected elements of employee files. NetSuite TribeHR enables reviewers to assess employees on their social HR parameters supported by the solution, including:

» 360 degree feedback
» Goals (number, type, and results)
» Skills (added or improved)
» Peer recognition (given and received)
» Alignment with corporate values
» Overall engagement

Payroll and Compensation Management

Managing and tracking employee compensation information can be done within NetSuite TribeHR’s core HRIS. Users can establish default settings based on the most common approach used in the organization, and individual employee files can be easily customized. NetSuite TribeHR Compensation Management integrates seamlessly with the employee profile and payroll information, and supports default currency settings at the company, location, or department level, allowing users to change the
applicable currency for individual employees. In addition, NetSuite TribeHR tracks historical salary data, including the occurrence and amount of any raises.

NetSuite TribeHR does not include a payroll processing application, but the solution currently integrates with ADP, Paychex and SimplePay. NetSuite TribeHR also includes standard exports allowing for integrations to most payroll solutions. NetSuite has plans to add additional pre-built integrations with payroll service providers in the near future.

**Reporting**

NetSuite’s TribeHR includes robust reporting functionality that includes ad-hoc reports and pre-generated dynamic reports for identified date ranges, making it easy to sort and modify report content for increased focus and relevance. All report data can be exported directly to Excel or in CSV format. The solution includes an inventory of built-in reports in various categories, including:

» Vacation and Time Accounting
» Demographics
» Recruiting
» Development and Growth
» General Reports

**Pricing and Implementation**

The average implementation timeline for NetSuite’s TribeHR is four to six weeks, depending on the particular package the customer is utilizing and customer readiness. TribeHR pricing packages start as low as $5 per employee, per month. Starter, group, and team level packages are available and are priced accordingly. NetSuite provides ongoing support from their award-winning support team. Training includes a number of tools and options ranging from facilitated demonstrations to customer onboarding sessions. Customers can utilize product online video tutorials, employee/manager remote training sessions, or on-site group training sessions, all based on the needs of the individual company.
Recall Profile

Recall is a global leader in information management solutions with more than 80,000 customer accounts in over 300 dedicated operation centers, spanning five continents and 23 countries. Recall provides customers with complete management of physical and digital information assets through one partner. Recall's innovative solutions empower organizations to make better business decisions throughout the entire information lifecycle, while ensuring regulatory compliance and eliminating unnecessary resources, time, and costs. Recall's ReView solution is powered by OnBase. It optimizes essential processes in HR by enabling organizations to effectively manage the entire employee lifecycle, from streamlining core HR processes to improving compliance and providing a better level of service to employees.

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Solution Overview

The HR environment is dependent on the use of documents that come in all shapes, sizes, and formats, making document management a critical focus for companies both large and small. The ability to organize and instantly retrieve documents has a critical impact on the functionality of HR and their ability to meet compliance and employment regulations. Recall experts understand the unique document management challenges of HR.
Their Digital Solutions team specializes in providing a customized turnkey solution for digitizing and managing a company’s entire library of personnel records, ensuring on-demand access and easy-to-use searches of vital HR data. Digital personnel files can be quickly audited, ensuring they are complete, up to date, and meeting any compliance requirements, resulting in a streamlined file and retrieval process that mitigates the risk of financial penalties and lawsuits associated with incomplete personnel and HR records.

ReView powered by OnBase can be deployed as a remotely hosted service, minimizing IT resources, accelerating implementation timelines, and reducing costs associated with software installation.

The solution enables HR departments to better manage employee files, equipping personnel with secure, instant access to critical information they need directly from their human resources information system (HRIS) or other familiar applications. With ReView, enterprises store all employee documents electronically in one central location, reducing the time spent searching for content while increasing security and supporting compliance with government and industry regulations.

By capturing employee documents electronically, HR departments can minimize the time spent on manual paper-based tasks and dramatically reduce administrative costs per hire. With efficient onboarding and built-in self-service options, ReView powered by OnBase empowers new employees to add more value, faster. Employees can quickly access personal documentation and initiate requests online. The solution supports compliance initiatives by determining whether important employee documents are missing from the system or about to expire, in addition to tracking employee acknowledgement of key policies and procedures, quickly identifying and resolving any discrepancies. ReView further minimizes compliance risks by facilitating effective document retention in accordance with federal, state or local employment policies.

Review also facilitates easier audits through the creation of automatic audit trails. The solution dramatically reduces time spent preparing for external audits by allowing HR to grant auditors limited access to the system, where they can quickly retrieve only the information they need to complete the audit. This eliminates the need for HR to make multiple copies of files for audit purposes.

There are a variety of security measures incorporated into the solution, including ways to control access and rights at the group and individual levels. Recall datacenters for hosted software are Safe Harbor compliant, as well as ISO-27001, SOC2, PCI DSS, SysTrust and SaS 70 (Type II).
ReView provides multiple language support, in addition to supporting multiple currencies. The solution also includes a mobile application that enables HR staff to interact with employee-specific content directly from their mobile device, improving decision-making and accelerating related processes.

**Recall's Core HR Applications**

*Recruiting and Applicant Tracking*

Recall’s ReView solution is equipped with a completely configurable workflow engine that supports recruiting, applicant tracking, new hire onboarding, and separation.

**Performance Management**

Recall’s solution can provide electronic forms for completing and routing performance reviews. The customizable workflow engine is configurable to support performance management automation, as well as employee case and issue management.

**Content Storage and Management**

Recall provides full-service document conversion services, from document preparation and imaging/scanning of hard copy documents to processing electronic documents. By migrating paper-based copies of documents stored across various file cabinets to electronic files, HR can streamline the management of all employee files, ensuring compliance and providing secure, instant access to all personnel and HR records. This enables HR to track and review all employee documents, requests, and interactions from a single interface. Because ReView powered by OnBase connects with an organization’s HRIS, personnel can instantly retrieve employee documents and data without leaving their familiar interface.

Since all HR documents are managed electronically with Recall's ReView, organizations can ensure that critical employee data such as benefits and medical information is secure. By controlling exactly who has access to the HR system and what they can do within the system, organizations have peace of mind knowing that only authorized personnel interact with employee personnel files. The system automatically tracks all document activity and provides a full auditable history of every action, further increasing employee accountability.
Reporting

ReView’s report service package includes a variety of robust reports. Both standard and ad hoc reports are available. ReView also handles exception reporting, which is a popular feature among HR personnel. Exception reporting enables enterprises to make a list of required documents within a given file, such as each employee file requiring a valid I-9. In an instance where an employee file is missing the I-9 or it has expired, the system can monitor and proactively notify the appropriate user of the missing or expired document. The solution also includes document knowledge transfer. This is another popular feature in HR when distributing and collecting acknowledgements for policies and procedures, employee handbooks, etc. The document knowledge transfer feature allows HR personnel to create a distribution list and have the system manage the notification and collection of acknowledgements, while also managing reminders and escalations for any delinquents.

Pricing and Implementation

Implementation of Recall’s ReView takes less than 90 days, once the discovery process is complete. Implementation time can vary depending on the amount of custom configuration and coding. The ReView pricing structure is offered as a combination of user licensing and modular functionality. Recall provides extensive customer support through dedicated support resources.
About PayStream Advisors

PayStream Advisors is a technology research and consulting firm that improves the way companies plan, evaluate, and select emerging technologies to achieve their business objectives. PayStream Advisors assists clients in sorting through the growing complexities of IT applications related to business process automation with the goal of making objective, analytical, and actionable recommendations. Wherever business process automation technology is an issue, PayStream Advisors is there to help. For more information, call (704) 523-7357 or visit us on the web at www.paystreamadvisors.com.