

# Alerts & Workflow for Sage

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## Sage HRMS Alerts & Workflow Discovery Document

This document helps ascertain the need for **Sage Alerts & Workflow** in your organization. It contains a list of questions based on how **Sage Alerts & Workflow** has delivered operational and financial benefits to customers (of all sizes) using it with an Sage HRMS. These questions are not listed in any particular order but are grouped into categories to demonstrate where **Sage Alerts & Workflow** can deliver value. Not all questions will apply to every organization but provides you with a guideline to identify opportunities for using **Sage Alerts & Workflow**. Some of these questions, when answered with hard numbers, can provide you with a strong business case and ROI basis when presenting or evaluating **Sage Alerts & Workflow** as a solution. EVERY organization can benefit from **Sage Alerts & Workflow** and it only takes a little creativity to find out where it can add value.

### Employee Hiring, Absenteeism & Termination

- 1) Do you have employees who are excessively absent or tardy?

**(If answer is yes)** If you could proactively identify when an employee is approaching or has exceeded their allotted sick days or is consistently tardy, how much money could you save your organization in lost productivity?

- 2) Would it be helpful to proactively track scheduled vacation time, medical leave and other leaves of absences?

**(If answer is yes)** How much time and money could be saved by automatically posting when employees will be on leave, what type of leave they are on and the remaining time of the leave?

- 3) Is the process whereby you hire or terminate an employee – making sure that all mandated steps are taken and options communicated – a manual one?

**(If answer is yes)** How much time could be saved by automatically notifying internal staff of actions that need to take place based on a new hire starting or an employee being terminated (e.g. scheduling training, IT requirements, turning in company property, exit interview, office setup, ordering business cards, etc.)?

### HR Policy Violations & Workplace Injuries

- 1) Do you ever become aware of a required HR task that should have happened – but didn't – such as a time card not submitted, a drug test not taken, or a training course not completed?

**(If answer is yes)** How much time and money could be saved if you had a system that automatically monitored for "in-activity" and sent corresponding reminders?

- 2) Are you aware of all workplace injuries? Are workplace injuries properly recorded and followed-up on?

**(If answer is no)** If you could identify trends in workplace safety and put the proper systems and processes in place to alleviate or minimize these, how much could that save your organization?

- 3) Have you ever been caught off guard by an excessive number of disciplinary problems, customer complaints, and violations of your employment policy?

**(If answer is yes)** How long after these violations occur do you actually find out about them? How much time do you spend trying to gather & analyze this information?

- 4) Would it be helpful for you to continuously monitor the required steps and guidelines for visa and green card sponsored employees?

**(If answer is yes)** How much time and money could be saved by automatically notifying internal staff of actions necessary to comply with visa and green card requirements?

## **HR Administrative Activities**

- 1) How much time do you spend generating and delivering standard forms and documents such as performance review forms, benefit enrollment forms or vacation request forms?

**(If answer is anything but '0')** How much time and money could be saved if *all* of your standard forms and documents ("New Hire" packets, performance appraisals, benefits forms, etc.) could be *auto-generated* and *auto-delivered* exactly when your staff needs them?

- 2) Does the task of running and distributing your HR analytical reports (turnover reports, total FTE count report, benefit enrollment reports, etc.) fall to one or more members of your HR staff?

**(If answer is yes)** How much time and money could be saved by having these reports auto-generated on recurring schedules, and auto-distributed to the staff who needs them?

- 3) Do you ever find that some of your HR records are missing data, or have invalid data, such as phone numbers with the wrong number of digits, or no mobile phone number at all?

**(If answer is yes)** How much time would you be able to save if your HR system automatically checked for missing or erroneous data and automatically requested updated information from the corresponding employees?

- 4) Do you ever have to chase down managers to remind them about employee reviews that are overdue for completion?

**(If answer is yes)** How much time do you spend making sure that employees receive the periodic reviews? How do you find out whether a review has been completed and whether any pay rate changes have been made?

- 5) How do you go about requesting approval for a new hire or for a capital expenditure? Do you have to manually remind people to review and respond to these requests?

**(If answer is yes)** How much time do you spend manually facilitating such a request through all of your internal channels in order to get it approved or denied?

## **Training**

- 1) Has an employee ever been de-certified because the deadline for re-certification was missed?

**(If answer is yes)** What are the ramifications (financial and other) of an employee not being certified? How much time and money could be saved by automatically notifying employees and their supervisors of certifications coming up for renewal?

- 2) Do you spend a lot of time ensuring that a new hire gets everything that they need in order to be a productive employee – such as enrolling in benefits, getting set up with an Email account, receiving a telephone line, and so on?

**(If answer is yes)** How much time could you save if on-boarding tasks were automatically created and delivered to the various staff members who play a role in bringing a new hire up-to-speed?

- 3) Have your employees ever missed required or essential training because they didn't know or sign up in time? How much time do you spend checking to confirm which employees have (or have not) completed training courses?

**(If answer is yes)** How much time could you save by automatically notifying your employees of upcoming training sessions?

## **Benefits**

- 1) Have employees ever missed an open enrollment period because they were unaware of (or ignored) the deadline?

**(If answer is yes)** How much time (and money) could be saved if you automatically reminded employees and their supervisors of upcoming benefit enrollment periods?

- 2) Have you ever missed requested changes to an employee's benefits or benefits effective dates?

**(If answer is yes)** How much time could be saved if you could automatically identify when an employee's benefits have been changed or they are eligible for new benefits?

## Payroll

- 1) Have you ever had employees exceed their overtime allotment?

**(If answer is yes)** How much money could your organization save by monitoring and alerting you when an employee is approaching their overtime allotment?

- 2) Would it be useful for you to be notified when an employee's pay rate has changed?

**(If answer is yes)** How much time could be saved on payroll processing if you could automatically capture when an employee's pay rate changes?

- 3) How quickly do you get notified about new, on-demand checks? Do you ever spend valuable time tracking a check back to see who requested it and who approved it?

**(If answer is yes)** How much time could you save by having automated alerts and confirmations sent out when a new check is requested, approved, and written?