



SP Marketplace SP HR Portal How-It-Works

Module Version 11.0



Table of Contents

Copyrights and Trademarks	3
Contact SP Marketplace	3
Introduction	4
Portal Overview	4
Portal Design	6
Related Resources.....	7
Roles and Security.....	8
Permissions	8
Navigation	9
Top Level Navigation.....	9
Employee Portal Top Navigation	9
Manager Portal Top Navigation.....	9
Staff Portal Top Navigation	9
Promoted Links	10
Employee Portal Promoted Links (Dashboard).....	10
Manager Portal Promoted Links (Dashboard)	10
Dept Staff Portal Promoted Links (Dashboard).....	10
Portal Content Management Page	11
HR Portal Content Management.....	11
Staff Portal Content Management.....	11
Manager Portal Content Management.....	11
Employee Portal Content Management	11
Data Relationships	12
Service Requests	12
Other Components	12
Processes.....	13
Appendix	15
Document Change Log	16

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Introduction

The SP HR Portal How-It-Works document reviews the application's functions from a business process perspective.

Portal Overview

The SP HR Portal product by SP Marketplace is a next generation integrated digital workplace solution that integrates process automation, staff collaboration and an employee self-service portal. It is a SharePoint site that provides three role-based portals, an HR Staff Portal where the HR team operates and two end user portals. The HR Employee Portal is where HR customers (employees) can submit service requests, access a knowledgebase and easily find news and resources that the HR group wishes to present to them. The HR Manager Portal is where managers can track and manager their employees.

The goal of the SP HR Portal is to drive self-service for employees and improve productivity and collaboration of the HR staff. The HR Portal also comes with a home page for all employees that acts like "mini intranet" that is HR specific, presenting news and announcements for all employees across the organization.

Core to the application is providing HR services and support utilizing a Service Request system. Additionally, it provides features to enhance HR staff communication and collaboration.

Key elements of the application:

- Process oriented features
 - A "mini intranet-like" home page for presenting HR news and announcements to all employees
 - A Service Request system to track employee service requests
 - Employee data management system
- Collaboration features
 - Knowledgebase
 - Document Libraries (Staff and Employee)
 - Task tracking
 - Calendars (meetings and schedules)

Use of the application is done through the portals which is separated by roles. The application automatically routes the user to the appropriate portal based on whether they are part of the department staff or an employee needing services or resources.

The HR Staff Portal is designed as a place where the department staff can work operationally every day, easily accessing the functions and resources they need to efficiently do their job. The HR Staff Portal has the following functionality:

- Service request tracking and management
- Employee data management
- Knowledgebase
- Collaboration features

- Work tracking – tasks, My Workplace dashboard
- Document Management
- HR management reports and Dashboard
- Access to the additional four HR applications (Hiring, Onboarding, Policy Management and Reviews), if your company is using these

Additionally, an Employee Portal is included, which makes it easy for end users to submit tickets, and access a knowledgebase, documents and training links.

The Employee Portal functionality consists of:

- Ticket submission and status
- Knowledgebase
- Department announcements
- Department news and events
- Useful documents
- Useful links
- Submit feedback to HR
- Manage my employees (Managers only)
- Access to the additional four HR applications (Hiring, Onboarding, Policy Management and Reviews), if your company is using these

The SP HR Portal is built on the Office 365 and SharePoint platform and leverages all the native Office 365 and SharePoint components and applications. The SP HR Portal therefore adapts to any future Microsoft 365 changes and is also 100% customizable by SharePoint business power users. Add your exiting logo, graphics, live feeds from your favorite websites to have a Weather or Stock Ticker, Polls and more, or let our [SP Marketplace Customer Services](#) department customize your application and match your company brand for you. You may learn more information about our Managed Customer Services [here](#).

Portal Design

The SP HR Portal is an operational portal that provides a template solution to enhance an organization's use of Microsoft Office 365 and SharePoint implementation. This template was designed with the objective of meeting the most common departmental support requirements of mid-range organizations with 50 – 2000 employees. This application won't meet every organization's full set of requirements out-of-the-box, rather it will accelerate the SharePoint deployment by delivering 80-95% of the functionality and allowing the organization to add the remaining 5-20%.

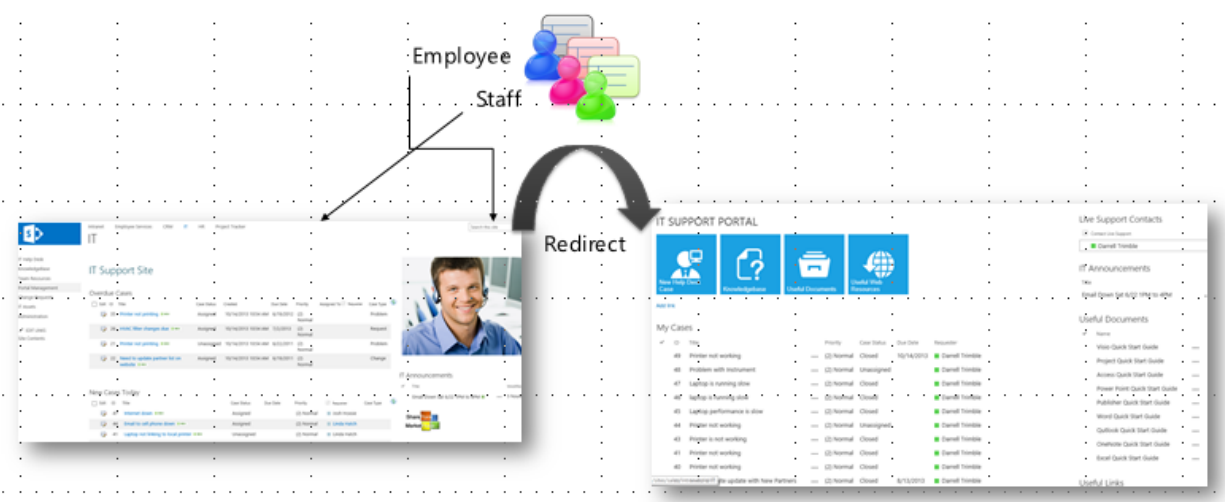
Role Based Portal

The SP HR Portal is designed with three audiences in mind, the department staff and all other employees (end users) some of which are managers. The core processing of the SP HR Portal is to capture, track and manage service requests, automate service request status communications with the employee, and to manage employee data.

In support of these three audiences, the application provides for three role-based portals. The Employee Portal allows employees to submit service requests, review service request status, and if possible resolve the service request/issue themselves through a knowledgebase, support materials, or by linking to resources like online tutorials. The Manager Portal allows managers to track and manage their employees and provide approvals to certain employee status changes.

The Staff Portal allows the department staff to manage employee data, service requests, collaborate with other department staff, manage the knowledgebase, and control what documents and resources the employees can access in the Employee and Manager Portals.

It is important to understand that based on what SharePoint Group a person belongs to, what menu items are presented to the end user varies. All employees will land on the HR Portal home page and see the Employee Portal in the navigation menu. If the employee is a manager, the Manager Portal menu option will also appear, and if the employee is a part of HR department staff, the Staff Portal menu option will be visible.



Enhanced Forms and Super Views.

A key component of all the SP Marketplace application templates is to utilize enhanced forms which allow the users to see everything related to the service request all in one place, sometimes referred to as Super Views.

Service Request

General Details - Status Worklog Related Tasks

Title *
Enter a brief description of service requested

Requester
Person making request

The template was designed with the features that were found to be most appropriate for SMEs, and is driven by best practice assumptions which include:

- Providing rules based forms which present a limited set of information to end users (the General Tab only) and show more information for department staff
- Presenting category information at a level that provides for reporting but does not confuse the end user with complexity
- Creating notifications that are informative, but not overdone (see workflows section)
- Keeping service request work log information confidential from end users
- Providing cross-list access to relevant lists and libraries, thus eliminating the need to leave the Service Request record in order to access additional information needed to resolve the issue
- Allowing the ability to create knowledgebase articles from a service request

Related Resources

- *SP HR Portal – Quick Reference V11*

Roles and Security

An important factor for a successful implementation is to appoint an SP Marketplace Application Administrator (SPMP Administrator) responsible for the application who will focus on learning the SharePoint platform and the SP HR Portal. This person does not have to be a skilled IT technician, rather a tech savvy business user will suffice. The level of knowledge is that of a SharePoint business power user. We have a curriculum available on our site that can train you in a matter of hours - go to <http://www.spmarketplace.com/training-services.html> .

After over 1200 implementations we have found this to be the single defining factor between success and failure. SharePoint is not like a database, nor a software program. It is different kind of platform, so learning the basic functionality of this platform will provide a tremendous amount of value. The upside of learning this basic knowledge, will be a smooth implementation and the ability to make desired customizations.

This basic SharePoint knowledge will also help the SPMP Administrator understand what SharePoint customizations are possible, or not. Like any platform, it has its limitations. Even though SharePoint runs on the web, it is not your typical HTML site.

Governance is more than just having a responsible SPMP Administrator. Governance also includes managing access through groups and retention policies on different data and documents.

Permissions

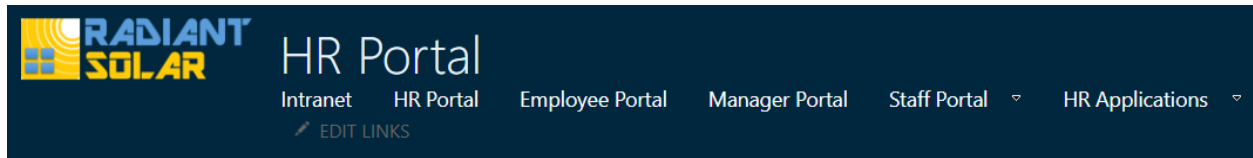
The general structure of access for these sites and the default Quick Start permissions at setup is as follows:

Role	Description	Permission Level
Administrator	Your company's SPMP Administrator	Full control of the SharePoint system
HR Staff	HR Department staff who manage service requests submitted by end users and who manage employee data and who keep portal news, announcements and events up to date	Access to the Employee, Manager and Staff Portals Edit service requests and manage the presentation of information on the HR Portal pages
Employees (End Users)	The employees who need to submit a service request, update their employee data, and access Department related resources	Access to the Employee Portal Create, and edit only their own service requests, and see only their own employee data
Managers (End Users)	The employees that are managers who need to manage their employees	Access to the Employee Portal and the Managers Portal. See only their employees' non-confidential information

Navigation

Top Level Navigation

The navigation may be customized as desired. Out-of-the-box functionality provides this top-level Navigation.



The Top Navigation Bar is home to most of the functions in the SP HR Portal. The SPMP Administrator is free to change this navigation by adding or deleting menu items using standard SharePoint Navigation in the Site Settings function. Controlling what navigation items show for which users is controlled by the Audience feature in the Navigation item. The Team menu item will only appear for customers using SharePoint On-Premise.

Employee Portal Top Navigation

- **Intranet Menu** – access the intranet
- **HR Portal Menu** – access the HR Portal home page for seeing HR news and announcements
- **Employee Portal Menu** – access the Employee Portal for submitting/tracking services requests
- **HR Applications Menu** – access the additional four HR Applications (if your company is using these)

Manager Portal Top Navigation

All of the above menu items plus this additional:

- **Manager Portal Menu** – access the Manager Portal for managing your employees

Staff Portal Top Navigation

All of the above menu items plus the additional:

- **Staff Portal Menu**
 - **Portal Content** – manage the content appearing on the HR Portal home page
 - **Tasks** – manage department staff related tasks
 - **Documents** – manage department staff related documents
 - **Calendar** - manage the department staff related events
 - **Links** – manage the department staff related links

Promoted Links

In addition to the top navigation, there are Promoted Links and Group Links sections that contain tiles with quick access links. The Group Links section will only appear for customers using SharePoint Online.

Employee Portal Promoted Links (Dashboard)

- **New HR Service Request** – create a new service request for HR
- **Update My HR Information** – update select fields of your employee data on file with HR
- **Email My Confidential** – request an email to see your employee confidential information on file with HR
- **Benefit Plans** – see the current benefit plans offered by the company
- **Knowledgebase** – search the HR Knowledgebase
- **Document Center** – see documents presented by the HR department

Manager Portal Promoted Links (Dashboard)

- **Submit New Employee Change** – submit a change to HR to one of your employee's job status
- **My Employees** – see a list of all of your employees and their non-confidential information
- **Email My Confidential** – request that HR send your selected employee their confidential information on file with HR
- **Knowledgebase** – search the HR Knowledgebase
- **Document Center** – see documents presented by the HR department

Staff Portal Promoted Links (Dashboard)

- **Dashboard: Promoted Links (Tiles)**
 - **Service Request List** – manage service requests
 - **Employee Record Management** – manage employee data
 - **Non-Confidential Employee List** – access the employee non-confidential list
 - **Confidential Employee List** – access the employee confidential list
 - **Employee Documents** – manage employee documents
 - **Manager Employee Change Requests** – see employee changes submitted by their managers
 - **Employee Info Change Requests** – see employee changes submitted by employees
 - **Benefit Plans** – manage benefit plans available for your company
 - **Employee Benefits List** – manage benefit plans enrolled by employees
 - **Employee Certifications** - manage certifications required for employees
 - **Knowledgebase** - manage Knowledgebase articles
 - **HR Dashboard** – access to Power BI
 - **Document Center** – manage the HR document library

The Administrator menu item is only available to the SP Administrator and includes template setup, license management and a link to the SP Marketplace Customer Portal.

Portal Content Management Page

Department staff have access to manage the content appearing on both the Staff Portal and the Employee Portal. All portal content can be managed by selecting Portal Content from the Staff Portal menu.

HR Portal Content Management

HR Announcements: Manage the announcements that appear on the HR Portal home page.

HR Events Calendar: Manage the events that appear on the HR Portal home page.

HR News: Manage the news that appears on the HR Portal home page. The Active Content feature allows you to check the Publish to Portal checkbox to push news to the company Intranet (if you are using the SP Marketplace Intranet module). News will need to be approved by the Content Manager before published.

Employee Recognition: Manage the employee recognition that appears on the HR Portal home page.

Knowledgebase: Manage HR knowledgebase articles.

Document Center: Manage the documents that should appear in the HR Document Center.

Manage Slider Images: Manage the slider images that appears on the HR Portal home page.

Open HR Portal: Open the HR Portal home page.

Staff Portal Content Management

Staff Announcements: Manage the staff announcements that appear on Staff Portal page.

Staff Calendar: Manage the staff events that appear on the staff calendar on the Staff Portal page.

Staff Links: Manage the staff links that appear on Staff Portal page.

Open Staff Portal: Open the HR Staff Portal page.

Manager Portal Content Management

HR Announcements: Manage the announcements that appear on Manager Portal page.

HR Events Calendar: Manage the events that appear on Manager Portal page.

Open Staff Portal: Open the HR Manager Portal page.

Employee Portal Content Management

HR Announcements: Manage the announcements that appear on Employee Portal page.

HR Events Calendar: Manage the events that appear on Employee Portal page.

Open Employee Portal: Open the HR Employee Portal page.

Data Relationships

The SP HR Portal runs around one primary data lists being service requests and the employee list.

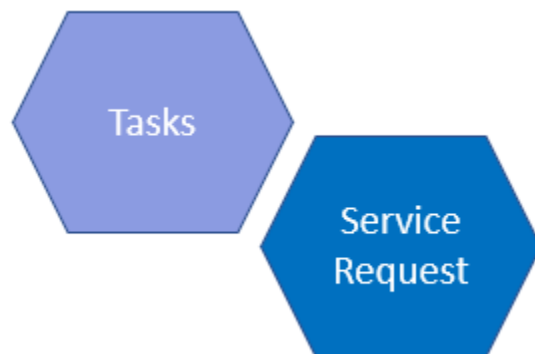
Service Requests

Service Requests can be submitted by end users in the HR Employee Portal, by department staff in the HR Staff Portal, or they can come in via email. Email submission setup is not an out-of-the-box feature, however can easily be configured by the SPMP Administrator (SharePoint On-premise requires an add-on product).

Once a service request is created, it is assigned by a department staff member and can be tracked in different views such as My Service Requests, Overdue Service Requests, Service Requests by Category, and more. After a service request is completed, department staff members can create a Knowledgebase article from the service request for future reference by technicians and users alike.

Infowise alerts and actions automate simple processes such as notifications to customers and technicians when a service request is assigned. Workflows automatically create Knowledgebase Articles when created at the service request level.

The following diagram illustrates the data relationships for service requests.



Other Components

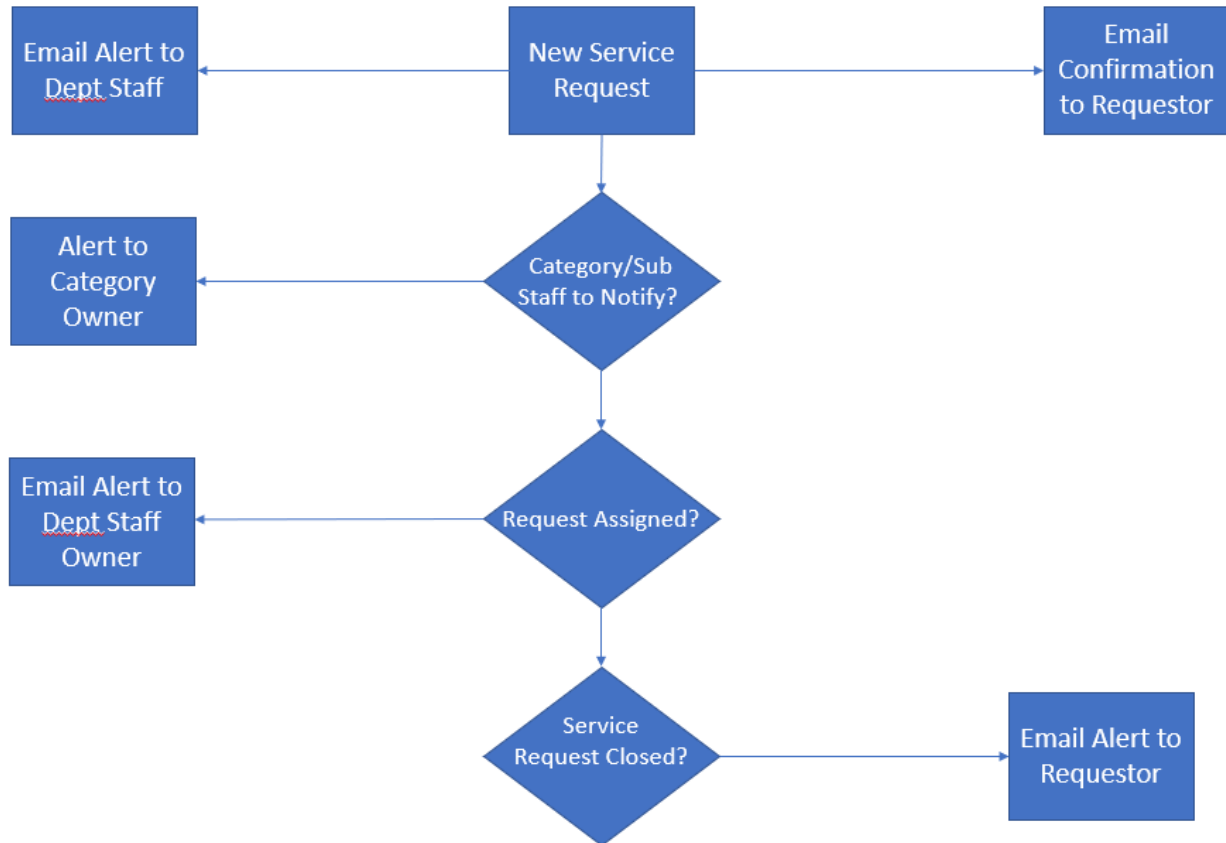
Other application components of the SP HR Portal include:

- Knowledgebase
- Tasks
- Staff and portal documents
- Staff and portal announcements
- Staff links
- Staff and portal calendar
- Department news viewable on both portals
- Employee Recognition
- Reports
- Delve Discussion Board (if customer utilizing Microsoft Office Delve feature)

Processes

Service Request Management

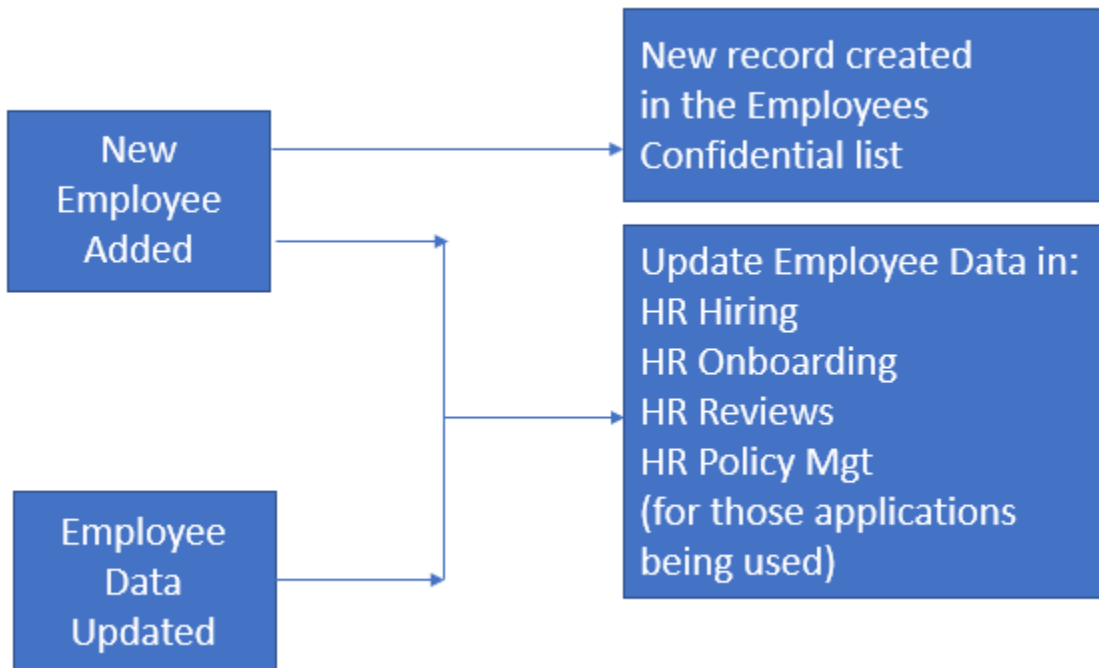
Service Request management includes business automation which is executed by Infowise alerts and actions. The following diagram detail the automated business processes that occur in the SP HR Portal application around service request management.



Employee Data Management

Employee data management includes business automation which is executed by Infowise alerts and actions. The following diagram detail the automated business processes that occur in the SP HR Portal application around employee data management.

Employee Added or Updated



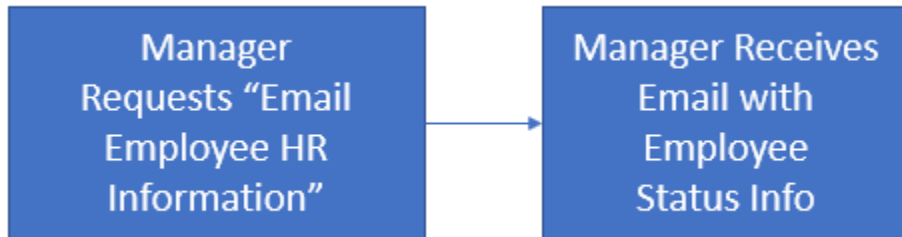
Employee Requests Confidential Information

Employee requests their confidential information on file with HR to be emailed to them by clicking the **Email My Confidential** tile.



Manager Requests Information

Manager requests their employee's status information on file with HR to be emailed to them by clicking the **Email Employee HR Information** tile.



News/Announcements/Events: Publish to Intranet

This business automation applies if your company is using the SP Intranet product also.



Appendix

Document Change Log

Date	Description