



SP Marketplace

SP HR

How-It-Works

Module Version 14.0



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Introduction

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

Portal Overview

The SP HR 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 two role-based portals and one Manager dedicated menu. The HR Staff Portal is where the HR team operates day-to-day, managing the employee data, the service requests from the field, and other HR functions. 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 menu is where managers can access resources to track and manager their employees. And the HR New Hire Portal is where new employees receive welcome messages, important HR information and can submit their information and forms to HR.

The goal of the SP HR is to drive self-service for employees and improve productivity and collaboration of the HR staff. 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
 - Employee data management system
 - Service Request system to track employee service requests
 - Hiring management system
 - Onboarding and offboarding 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 including certification, training and performance review tracking
- Hiring, onboarding and offboarding management
- Manager menu items for managing their employees
- Knowledgebase

- Collaboration features
- Work tracking – tasks, My Workplace dashboard
- Document management
- HR management reports and Dashboard

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

The Employee Portal functionality consists of:

- Welcome messages and instructions from HR
- Ability to submit employee data and completed new hire forms to HR
- Forms library for downloading new hire HR forms
- Benefits information and instructions

The SP HR is built on the Office 365 and SharePoint platform and leverages all the native Office 365 and SharePoint components and applications. The SP HR 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 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%.

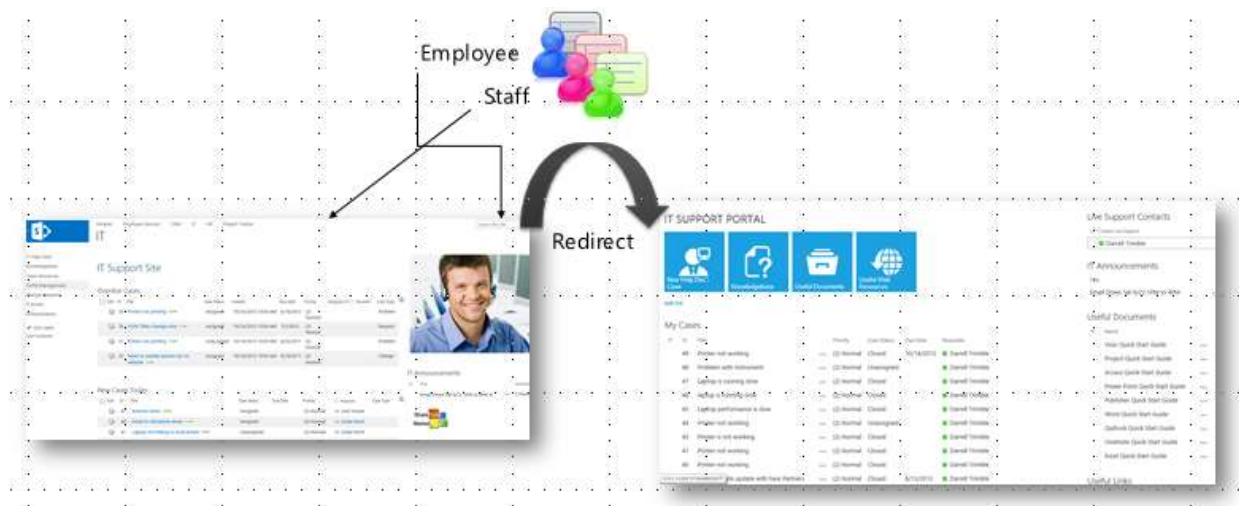
Role Based Portal

The SP HR is designed with three audiences in mind, the department staff, all other employees (end users), and new hires. The core processing of the SP HR is to capture, track and manage service requests, automate service request status communications with the employee, to manage employee data, and to automate the hiring and onboarding processes.

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 New Hire Portal allows new hires to receive important new hire information from their HR department and to submit their HR data and forms to HR.

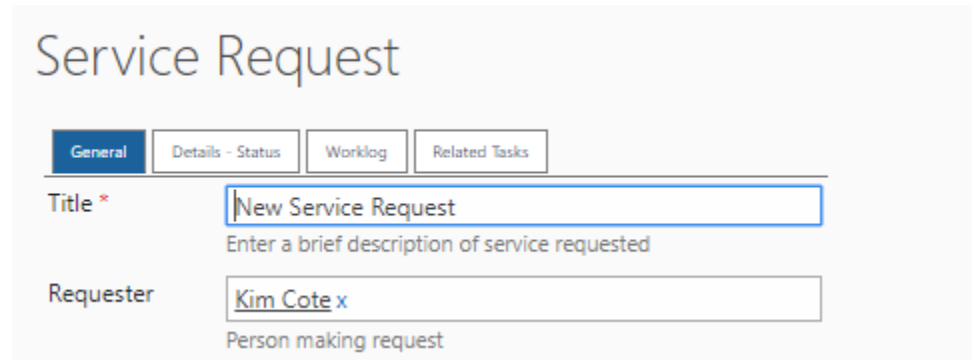
The Staff Portal allows the department staff to manage employee data, service requests, the hiring process, performance reviews, certifications, policies, the onboard/offboard process and to collaborate with other department staff, manage the knowledgebase, and control what documents and resources the employees can access in the Employee Portal.

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. If the employee is part of the HR department staff, they will be taken to the Staff Portal, otherwise they will be redirected to the Employee Portal. If the employee is a manager, they will see the Managers menu at the top left. If the employee is a new hire, they will be sent a link to the New Hire Portal.



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.



The screenshot shows a web interface for a 'Service Request' form. At the top, there are four tabs: 'General' (selected), 'Details - Status', 'Worklog', and 'Related Tasks'. Below the tabs, there are two main input fields. The first is labeled 'Title *' and contains the text 'New Service Request'. Below this field is a placeholder text: 'Enter a brief description of service requested'. The second field is labeled 'Requester' and contains the text 'Kim Cote x'. Below this field is a placeholder text: '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 Staff Quick Reference V14*

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. 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 1300 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

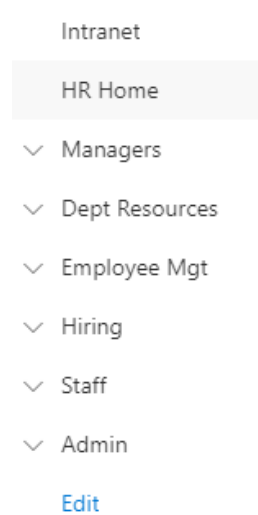
The general structure of access for these sites and the default Quick Start permissions at setup is as follows:

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

Left Navigation

The navigation may be customized as desired. Out-of-the-box functionality provides the standard modern left Navigation.



The Left Navigation Bar is home to most of the functions in the SP HR. 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 Left Navigation

- **Intranet** Menu – access the intranet
- **HR Home** Menu – access the HR Portal
- **Managers** Menu – access the Manager related features – only available to managers

Staff Portal Left Navigation

All of the above menu items plus the additional:

- **Staff Portal** Menu
 - **Dept Resources** – manage general department tasks like the Service Requests, Helpdesk, policies and forms, time off requests, and the announcements appearing on both the Employee Portal and Staff Portal
 - **Employee Mgt** – manage everything relating to employees
 - **Hiring** – manage the hiring process including onboards and offboards
 - **Staff** - access the department team collaboration features

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 Service Request** – create a new service request for HR
- **New Time Off Request** – request time off for approval by your manager
- **Employee Record Update** – submit changes to your HR information to HR
- **Useful Documents** – see documents presented by the HR department
- **Knowledgebase** – search the HR Knowledgebase
- **My Time Off Requests** – see the time off requests that you have submitted
- **New Hire Portal** – access the New hire Portal

Dept Staff Portal Promoted Links (Dashboard)

- **Dashboard: Promoted Links (Tiles)**
 - **Service Requests** – manage service requests
 - **My Workspace**– see everything assigned/related to you
 - **Employee Records**– manage employee data
 - **Employee Documents** – manage employee documents
 - **Knowledgebase** - manage Knowledgebase articles
 - **Employee Portal** – open the Employee Portal
 - **Dashboard** – access to Power BI 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 Dept Resources menu.

Staff Portal Content Management

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

Dept News: Manage the news that appears on both the HR Staff and Employee Portals. 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.

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

Staff Promoted Links: Manage the tiles that appear on Staff Portal page.

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

Staff Portal: Open the HR Staff Portal.

Employee Portal Content Management

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

Dept News: Manage the news that appears on both the HR Staff and Employee Portals. 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.

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

Employee Portal Links: Manage the tiles that appear on Employee Portal page.

Useful Links: Manage the useful links that appear on Employee Portal page.

Useful Documents: Manage the documents that appear on Employee Portal page.

Employee Portal: Open the HR Employee Portal.

Data Relationships

SP HR runs around two primary data lists - service requests and the employee list.

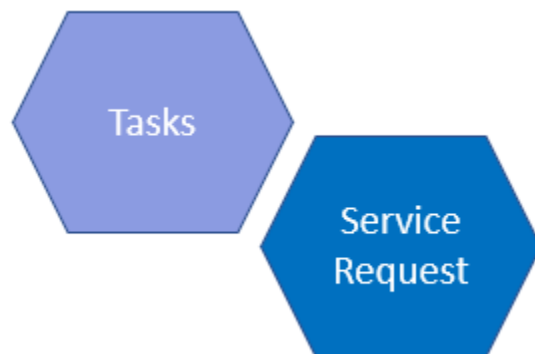
Service Requests

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.

Workflow 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 include:

- Knowledgebase
- Tasks
- Staff and portal documents
- Staff and portal announcements
- Staff links
- Staff and portal calendar
- Department news viewable on both portals
- Reports

Processes

Department Resources

Service Request Management

Service Request management includes business automation which is executed by Workflow/Flow alerts and actions. The following chart details the automated business processes that occur in the SP HR application around service request management.

Business Function	Description	Trigger
HR Service Request	<p>Sends a confirmation Email to the Requester field.</p> <p>If the Assigned To field changes, sends an Email Notification to the new Assigned To person.</p> <p>If the Status is changed to 4. Closed, sends an Email notification to the Requester. If the Create KB field is checked, create a KB item using subject and resolution field.</p>	Employee Submits a HR Service Request

Time Off Requests

Business Function	Description	Trigger
Time Off Request Submitted	<p>When a new time off request is submitted, an approval email is sent to the Approver, or the Manager if Approver is blank. If approved the Time Off Data list is updated using data from the Time Off Request. Email notifications sent to Employee when approved or disapproved.</p>	Time Off Request on new

Employee Data Management

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

Business Function	Description	Trigger
Performance Reviews	Send a weekly Email Notification to Manager for Employee who has Next Review Date in next 30 days.	Employee's Next Review Date is within 30 days
Employee Updates their HR Information	When an employee submits a new Employee Record Update either from the Employee Portal or the New Hire Portal, the Employee Record is updated.	Employee Record Update Submitted
Manager Submits Employee Change	When a Manager Employee Change Request is approved, sends an email notification to Manager who created the request and Employee Record is updated.	Manager Submits New Employee Change
Certifications	Send a weekly Email Notification to Manager for Employee who has Certification Renewal Date in next 30 days	Employee's Certification Renewal Date is within 30 days

Hiring

Business Function	Description	Trigger
New Requisition is Created	When a new requisition is created, the Requisition Status is updated based on approval results and Email notification is sent to Hiring Manager.	Requisition on new and modified
Applicant becomes a Candidate	When Applicant Status contains 4. (4. Selected), create and new Candidate record using the Applicant's information and resume.	Applicant's Status Changed to 4. Selected

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