



HR SYSTEM IMPLEMENTATION RFI SANPARKS

Table of Contents

Table of Contents	2
1 General	5
2. Vendor Information	6
2.1 Vendor Background	6
3. Vendor Details	7
3.1 Vendor Questionnaire	7
3.2 Financial Background	7
3.3 Staffing	8
3.4 Skills	8
3.5 Geographic Representation	8
3.6 Customer Base	9
3.7 Reduction in TCO for customers with emphasis on achieved savings	10
3.7 Reference Site List -	10
4. Vendor Requirements	11
4.1 Vendor Requirements	11
5. Cost	13
5.1 System Cost	13
6. Implementation Approach	14
6.1 Implementation Approach	14
7. Consulting Approach	15
7.1 Consulting Support	15
8. System Training	16
8.1 System Training	16
9. System Overview	17
9.1 System Overview	17
9.2 System Documentation	17
10. Interfaces	18
10.1 System Integration	18
11. System Questionnaire	20
11.1 System/Technology Requirements	20
11.2 System/Technology Requirements (continued)	21
12. Technical Specification	23
12.1 Architecture Overview	23
12.2 Development and Integration	23
12.3 Hardware & Software Requirements	23
13. Cost	28
13.1 System Cost	28
14. Product Questionnaire	29

14.1	Employee Management	30
14.2	Job Profiles	33
14.3	Organisational and Planning	36
14.4	Training	38
14.5	Employee Relations	42
14.6	Employment Equity	44
14.7	Development Management	44
14.8	Recruitment / Applicant Tracking	50
14.9	Resource Planning	56
14.10	Health and Safety	57
14.11	Salary Modelling	58
14.12	Self-Service	58
15.	Human Resources Events	61
15.1	New Starter	61
15.2	Termination	63
15.3	RE-Instatement of Employees	64
15.4	Promotions	65
15.5	Transfers and Secondments	65
15.6	Employee Information Changes	66
15.7	Employment History Screen	67
16.	Payroll System Functionalities	68
16.1	Payroll: Cost Component Requirements	69
16.2	Payroll: Import of Data Facility	70
16.3	Payroll: Employee Payroll Categories	70
16.4	Payroll: Fast Entry Screen	71
16.5	Payroll: Foreign Employees	71
16.6	Payroll: Tax Routines	72
16.7	Payroll: Withhold of Pay	73
16.8	Payroll: On-Screen Pay Slip Results	73
16.9	Payroll: On-Screen Pay Slip Result Comparison	74
16.10	Payroll: Statuary Requirements	75
16.11	Payroll: Salary Structuring	75
16.12	Payroll: Future Transactions	76
16.13	Payroll: Retro Calculations	77
16.14	Payroll: Interim Runs	77
16.15	Payroll: Payment after Termination Date	78
16.16	Payroll: Payment of Net Pay Salaries	79
16.17	Payroll: Payment of 3 rd Parties	79
16.18	Payroll: Salary Calculator	80
16.19	Payroll: Report Scheduler	80
16.20	Payroll: Time and Attendance System	81
16.21	Payroll: Pay Slip	81
16.22	Payroll: System Roll Over	82
16.23	Payroll: Tax Year End: IRP5	83
16.24	Payroll: UIF	84
16.25	Payroll: Integration: Costing	84
16.26	Payroll: Customer Service	85
16.27	Payroll: National Minimum Wage Validation	85
16.28	Payroll: Working Time Directive	86
16.29	Payroll: Employers Electronic Communication (EEC)	87
17.	Payroll Specific Requirements	88
17.1	Payroll: Pension / Provident Fund Schemes	88
17.2	Payroll: Medical Aid Schemes	90
17.3	Payroll: Company Loans	91
17.4	Payroll: Bonus	92
17.5	Payroll: Garnishee / Maintenance Orders	94

17.6	Payroll: Travel Allowance	94
17.7	Payroll: Group Life	95
17.8	Payroll: Group Disability Cover	95
17.9	Payroll: Fringe Benefits (Company Car / Mobile Phones)	96
17.10	Payroll: Employee Expenses	97
17.11	Payroll: Client's Specific Payroll Requirements	97
18.	Leave Management	100
18.1	Leave: Leave Type Requirements	100
18.2	Leave: Import of Data Facility	102
18.3	Leave: Link to Payroll	103
18.4	Leave: Employee Termination (Procedure)	103
18.5	Leave: Fast Entry Screen	104
18.6	Leave: Public Holidays	104
18.7	Leave: Leave Management Reports	105
18.8	Leave: Client Specific Absence Requirements	105
19	Reports	108
19.1	Reports	108
19.2	System/Technology Requirements (continued)	112

1 General

- This appendix contains the detailed functional requirements of the
- Human Resource (HR) for the company SA National Parks (SANParks).
- Vendors are required to provide a ✓ (Yes) in the appropriated GAP Result column for each response to each item of the functionality described herein.
- For any additional comments, Vendors may use the "Vendor Response".
- Additionally the vendor may be asked to submit additional detail and Information.
- The system must allow for a minimum of 6500 employees and no maximums.
- All volumes would be verified during negotiation for their impact on license costs and hardware sizing.
- The proposed solution must have an integrated payroll and leave modules with the HR management system.
- The system must be able to function on a centralised basis and have decentralised offices accessing the system with the requirement to centralise information.
- The system must allow for download and upload of information in Excel on any requested field in order to allow for data corrections or payroll payments. This must be in a user friendly manner.
- The system must allow for safeguards to ensure the "correct" information is entered into the system.
- Messages must appear on the screen to warn the user where incorrect information has been entered/ captured.
- The system must allow for reports to be generated in a user friendly manner on any data field that the user has authorised access.
- The system must allow employees to view their personal information (only selected information).
- The system must allow for easy interface to E-mail (MS Mail) to send reminders, invites to training, etc.
- The system must not provide for double entry of personal information except for minimal payroll components.
- The system must operate on a "realtime-ontime" basis, thus reflecting changes as it is captured.

2. Vendor Information

2.1 Vendor Background

- The vendor is requested to submit general information and comment on the following questions:
 - Are you an international Company?
 - Are you a SA based company?
 - Is the support/customisation locally rendered?
 - Please note that Item 9 of this RFI deals with more vendor detail.

3. Vendor Details

3.1 Vendor Questionnaire

Through what form of legal entity does the vendor operate (e.g. Company, CC, and Partnership, etc.)?				
When was the legal entity founded?				
What is the ownership structure of the legal entity?				
What percentages do they own?				
Growth Information	2006	2007	2009	2010
Total Number of Employees				
Turnover				

3.2 Financial Background

	Sales	Services	Other
Total Company Turnover			
Can you provide Financial Statements for the last financial year?			
If Not, what Year do your most recent Financial Statements pertain to?			

3.3 Staffing

	Sales	Consulting Services	Technical Support	Development	Managed outsourcing
Total Number of Employees					

3.4 Skills

Describe your International experience and skills in the outsource arena	
Describe your local experience and skills in the managed services arena	

3.5 Geographic Representation

Where is the company Head Office located?			
How many Branch offices does the company have worldwide?			
Where are these Branch offices located?			
Continent	Country	State / Province	City
South Africa			
Africa			
Europe			
Australia			
America			
Asia			
Do you make use of Agencies to market, sell and support your products and services?			
If yes, where are these Agencies located?			

HR System Implementation RFI - SANParks

Continent	Country	State / Province	City
South Africa			
Africa			
Europe			
Australia			
America			
Asia			
Who do you have strategic alliances with?			
What is the nature of these alliances?			
Who is your representative in South Africa?			
How long has the company been represented in South Africa?			
What is the relationship with the South African representative?		<input type="radio"/> Wholly Owned <input type="radio"/> Joint Venture <input type="radio"/> Other (specify):	<input type="radio"/> Partially Owned <input type="radio"/> Agency

3.6 Customer Base

Installations	South Africa	Africa	Europe	Australia	North America	Asia	South America
Number of Customers							
Number of sites where you are managing this service							
Number of new users (in the last 12 months)							
Number of Multi-Site Corporations							

3.7 Reduction in TCO for customers with emphasis on achieved savings

3.7 Reference Site List -

List at least 4 South African and 2 International reference sites. Include number of machines being managed on site in relation to the number of users.

Note: SANParks will not contact any of these reference sites without your prior consent.

Reference Site List	Customer Name	Contact Name	Telephone No.
List the names of the reference sites in South Africa			
List the names of the International reference sites			
Is the vendor prepared to conduct a Pilot implementation exercise at SANParks?		<input type="radio"/> Yes	<input type="radio"/> No
If yes, under what parameters?			

4. Vendor Requirements

This section details the questions to be asked about the system approach to handling all leave management requirements.

Vendors must take note of the following keys when completing the questionnaire

Key: Vendor Rating

<i>0</i>	<i>1</i>	<i>2</i>
<i>Not catered at all</i>	<i>Catered in the System</i>	<i>System to be customised</i>

Key: Importance

<i>0</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>
<i>Not required at all</i>					<i>Absolutely critical</i>

4.1 Vendor Requirements

Requirement	Rating	Level of Importance	Comments
<i>Implementation</i>			
There must be sufficient local technical resources to fully support the implementation in the specified time period		5	
<i>Training</i>			
South African based training.		3	
<i>Support</i>			
24 X 365 hours support		3	
South African based		5	

HR System Implementation RFI - SANParks

Requirement	Rating	Level of Importance	Comments
<i>Management criteria</i>			
Project management capabilities		1	
Proven client track record		5	
Provide updates re legal requirements		5	

5. Cost

5.1 System Cost

The vendor should provide full details of the cost of ownership to the client.

Please provide a detailed breakdown of:

- Acquisition cost
- Implementation cost
- Consultation cost
- Training Cost
- Maintenance / Support cost
- Licensing Cost

The vendor has to specify if a protection is offered in the event of inadequate support or withdrawal of the system from the market.

6. Implementation Approach

6.1 Implementation Approach

The vendor has to provide the client a brief overview with regard to their implementation approach.

The vendor is requested to comment on the following questions:

- Is the vendor involved with the customisation of the client's Payroll or HR requirements into the proposed solution offered?
- Are additional consultants locally available for assistance?
- Is the vendor willing to assist with customisation?
- Is the vendor willing to provide consultation?
- Describe your policy and services offered in relation with implementation.
 - Implementation responsibility and tasks which you as the supplier will undertake.
 - Implementation responsibility and tasks which the client will undertake.
 - Additional anticipated staff requirements that the client may require for the implementation and thereafter with the operation, administration and maintenance of the system.
- What is the estimated time to install and implement?
- Data conversion - will the vendor assist to get the data correctly uploaded in the system?

7. Consulting Approach

7.1 Consulting Support

The vendor should provide full details of the levels of maintenance and support available to the client.

Please provide your response to the following questions:

- Is Consultant Support readily available?
- How many consultants are dedicated full-time to system support?
- What are the normal hours and days this support is available?
- Are there provisions for “after hours” support?
- What type of ongoing support does the vendor provide?
- Where is the support service located?
- How many consultants are dedicated full-time to supporting the applications?
- In the event of a disaster, can the vendor provide backup facilities?
- Can the vendor also provide enhanced technical support?
- Does the vendor offer support packages? If so, please provide details thereof.
- What is the charge rate for support?
- The vendor’s travelling charge rate?

8. System Training

8.1 System Training

How will training be dealt with? The training for technical staff and system users should be conducted in English or in Afrikaans if required.

Please provide a detail breakdown of:

- HR/Payroll User Training.
 - Duration
- Technical training
 - Duration
- Where should the training take place?
- At the vendor's training centres or at client's premises?
- Any recommendations to overcome training restrictions or hurdles?
- Please indicate clearly any courses which will need to be undertaken and competently managed before the system software training course can be attended.
- What different training courses are offered / available to the client by the vendor?
- What is the vendor's training cost fee structure?

9. System Overview

9.1 System Overview

The vendor is requested to supply the client with a short background of the all the features of their system.

9.2 System Documentation

The vendor is to indicate if the client is provided with system manuals.

- Are user manuals available?
- Is the manuals user friendly?
- Are technical manuals available?
- Is it available in hard copies / CD-ROM?
- Are extensive on-line help facilities available?

10. Interfaces

This section details the questions to be asked about the system approach to handling all integration requirements.

Vendors must take note of the following keys when completing the questionnaire

Key: Vendor Rating

<i>0</i>	<i>1</i>	<i>2</i>
<i>Not catered at all</i>	<i>Catered in the System</i>	<i>System to be customised</i>

Key: Importance

<i>0</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>
<i>Not required at all</i>					<i>Absolutely critical</i>

10.1 System Integration

This section details any general questions relating to interface requirements.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Can the system interface with 3 rd Party systems?		5	
Must interface to the following systems: <ul style="list-style-type: none"> • ERP system - the client is using "MS Dynamics GP" as ERP system. Currently requires integration with General Ledger, Debtors, Creditors and Project Accounting • Reservations system iro staff benefits • Time and Attendance system 			

HR System Implementation RFI - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
<ul style="list-style-type: none"> Generic Enterprise Service BUS (ESB) - Sun JCaps 			
Ability to accept uploads in a flat file format?			

11. System Questionnaire

11.1 System/Technology Requirements

Key:

0	1	2	3	4	5
<i>Not required at all</i>					<i>Absolutely critical</i>

Requirement	Rating	Level of Importance	Comments
<i>Operating Environment</i>			
Server -Windows Server 2008 HyperV		5	
Desktop - Windows 7		5	
<i>Database</i>			
Relational		5	
<i>Server</i>			
Must be able to run in a Windows 2008 HyperV virtual server environment		5	
<i>Communications</i>			
The system must be able to run on an Ethernet network		5	

11.2 System/Technology Requirements (continued)

Requirement	Rating	Level of Importance	Comments
<i>Security</i>			
Must support individual user logons and SSO		5	
Access Control should be granular (field level)		4	
Field level Audit trail		5	
The system must allow for security to be defined relative to the groupings which exist within the system		5	
Access Control must be able to support employee self service		5	
<i>Interfaces</i>			
Integrate with an SMS Mobile Gateway		1	
Ability to accept uploads in a flat file format		5	
<i>Document Management</i>			
The management of document creation.		2	
The management of document enhancements and change control.		2	
Managing and distribution of inbound and outbound documents.		2	
Managing document sign-off/ approval.		2	
<i>General</i>			
Imaging facilities allowing users to store images of important documents and photographs integrated with MS Share Point.		5	
Easy to use utilities including back-up and restore to ensure data integrity, roll back and roll forward.		5	
Other tools such as internal email and on screen calculations.		1	
Elimination of duplication and recapturing of data.		5	
Emphasis is placed on complete integration between the various modules. This implies that all the data is logically kept in one central repository with a single source of entry for each data field. A key requirement is that all data has one point of entry, thus eliminating the currently undesirable practice of duplication of effort.		5	
Must have "easy to use" and intuitive menu navigation.		5	
Windows based with GUI navigation.		5	

HR System Implementation RFI - SANParks

Requirement	Rating	Level of Importance	Comments
Have good overall systems documentation.		5	
Allow for modular implementation		4	
<i>Audit requirements</i>			
Any changes to the data in the system is electronically and automatically recorded and must have the option to disable parts, not everything, if need be.		5	
The system must contain a full audit trail of entries and amendments together with the ability to drill down to the original entry / amendment screen		5	
<i>Electronic mail</i>			
Must integrate with MS Exchange		5	
Remind users to run reports		5	
<i>Help</i>			
On-line easy to use help		5	
Available throughout the system.		5	
Customisable by the user.		5	
<i>Reporting</i>			
The system database is ODBC compliant, enabling any 3 rd party report writing tool is able to extract the information in SANParks's required format.		5	
The system uses a recognised industry relational database; i.e. not just flat files mapped to a database.		5	
Printer functionality:		5	
• Output to screen or printer			
• Any laser printer			
• All DeskJet / inject printers			
Outputs to file:		5	
• MS Word			
• MS Excel			
• PDF			
• XML			
• Flat / Fixed length files			
• Letter generation by application			

12. Technical Specification

12.1 Architecture Overview

The vendor is requested to submit a brief system architecture overview of their system.

12.2 Development and Integration

The vendor is requested to comment on the following questions:

- What computer languages were used in the development of the application?
- To what extent is the system based on a database management system?
- Describe ways in which the application can interfaced to other 3rd party systems:
 - General Ledger?
 - Reservation system?
 - Time and Attendance system?
- List any 3rd party systems (name and version) that the application has been successfully interfaced to.

12.3 Hardware & Software Requirements

The system must cater for a minimum of 6000 employees.

12.3.1 Infrastructure

The vendor is requested to describe the following infrastructure to the client:

- Database
- Is it a true relational database?
- Is it ODBC compliant?
- Is it Windows compatible?
- Network requirements: TCP/IP?
- Is the system Citrix Metaframe compliant?
- Web based access
- Native integration into the Network Operating System (Active Directory)
- Built in database OLAP engine
- Total of Workstations allowed?

12.3.2 Architecture

The vendor is requested to describe the following architecture to the client whether the system is compliant:

- COM (Component Object Modelling) Business Object Level (i.e. Transaction Exposure)
 - COM (Component Object Modelling) User Interface Level (i.e. Screen Exposure)
 - Is an online user friendly data structure enquiry tool available?
 - Integration into Front Office Productivity tools (MS Office)
-

- Is a Full Software Developers Kit available (SDK)?
- Full XML integration into core transaction entries and master records

12.3.3 Minimum Technical Requirements

What are the minimum technical specifications for a server to handle ± 6000 employees on the database i.e.?

- Hardware platform
- Hardware required
- Operating system platform
- Database platform
- Network
- Processing Unit Detail
- Disk Drive Detail
- Tape Drive Detail
- Client Workstations (User)
- Client Workstations (Administration user)

12.3.4 Rounding / Decimals

Is the system able to round off values (decimal)? :

- 2 for leave balances
- 5 for financial results
- Thousand separator

12.3.5 Optional / Additional Screens or Fields

Is it possible to create optional / additional fields or screens in all modules?

12.3.6 Personalised Directories

Is it possible to have personalised directories?

12.3.7 System Functioning

The system should be able to function on a centralised basis and for decentralised offices to access the system. Furthermore, the system should be able to warn the user where incorrect information is captured in specific fields or where mandatory fields have not been completed.

- The vendor must please describe if the system is able to function on a centralised basis.
- Is it possible for decentralised offices to access the system?
- The system must allow for safeguards (warnings) to ensure the “correct” information is entered into the relevant field of the system.

12.3.8 Database Query Capabilities

The platform should allow the client with queries. What facilities are used with? :

- General queries
- Report Writer
- Graphics Facility
-

12.3.9 Flexibility / Customisation

The system should be able to cater for the client’s needs and requirements.

The vendor should indicate if their system is? :

- Fully Integrated
- Fully Customisable
- Flexible
- Easy to Use (User friendly)
- Easy to Extract Information
- Real time on time
- The system must be able to generate standard letters, mailing labels, name tags etc. from Microsoft Word in English.
- Is provision made available for multi-language capabilities?
- Is provision made for multi-currencies?
- Easy Maintainable
- Offers search facilities
- Allows one point of capturing
- Customised for SA conditions?
- Customised for other foreign countries conditions?
 - Botswana
 - Namibia
 - Zambia
 - Swaziland
 - Lesotho
 - Mozambique
 - Zimbabwe
 - Malawi

12.3.10 Web enabled

Please confirm if the system is fully web-based? Can the vendor give the client a brief benefit as to why the system to be used by the client should be web-based?

12.3.11 Real Time

All movements, payroll rules and payroll transactions should be time bucketed (Effective Dates / Expiry Dates). Therefore the system should:

- Be real-time.
- Recognise the effective - / expiry dates of all transactions.
- This means a full record of all changes to a rule is kept.
- Retrospective changes may easily be made using rules that were effective at that time.
- Future changes may be loaded ahead of time and will automatically take effect at the correct time.

Can the system cater for these requirements?

12.3.12 Capturing of Data

The system should be case sensitive. When a user is updating the system, fields have to be defined as CAPS, sentence case and title case. The system has to force compliance.

Can the system cater for these requirements?

12.3.13 System Searches

The system must allow for fast employee search. The vendor must provide the client whether the system search facility can cater for:

- Employee Acronym

- Employee Number
- Initials and Surname
- Identity Number
- Names
- Partial Surname
- Wildcard.

12.3.14 Security Matrix

Security profiles have to be set up correctly per each user according to their profile and the system should be password protected.

- Users must have **write / change / delete access** for their specific pay groups.
- **Read access** to all other pay groups except Executive pay groups.
- Security set ups on system screens, will the report security profiles exclude payroll results for those employees whom users cannot see?
- Can the system cater for:
 - Establishing a security profile.
 - Force of changing passwords?
 - Multilevel access control.
 - Content-Sensitive security.
 - Organisational security.

12.3.15 Audit Trails

Please describe the audit trails provided. Can the vendor indicate to the client? :

- Does the system generate audit trail reports to indicate before and after values, dates, user id, employee numbers and time of changes?
- Can the system provide a standard audit report that lists selected contents of the audit file?

12.3.16 System Upgrades

Usually system upgrades / releases take place from time to time. The vendor is requested to provide the client with their comments on the following:

- Are future system releases / upgrades included as part of the ongoing maintenance agreement?
- If not included, what is the cost usually with upgrades?
- Are upgrades installed by vendor consultants or in what medium are future releases / upgrades provided?
- Are documentation and training updates usually included?
- How often are new releases / upgrades released?
- Typically, how long after a new release are previous versions maintained?

12.3.17 Internationally and South African Compliant

The system has to be internationally and locally compliant.

- System should handle various countries legislative requirements.
- The system must cater for various different countries payroll requirements.
- The system must cater for different pay procedures and rules within one company's set up.

Can the system cater for these requirements?

12.3.18 Licensing

The vendor has to specify their licensing options to the client.

- What type of license?
 - Group (annual or monthly),
 - Number of Work stations,
 - Concurrent users,
 - Licensed users,
 - Other (specify)
- The vendor to specify whether the maintenance contract allows for cover of file corruption is due to operating system or hardware failures.

12.3.19 Change Management Control

Can the vendor provide the client a brief overview with regard to the management of change control?

- What change control procedures are recommended?
- The purpose of the procedure is to
 - Evaluate,
 - Approve or disapprove,
 - Schedule and Track configuration changes
- Is it recommendable to make use of a test environment before making the changes “Live”?

13. Cost

13.1 System Cost

The vendor should provide full details of the cost of ownership to the client.

Please provide a detailed breakdown of:

- Acquisition cost
- Implementation cost
- Consultation cost
- Training Cost
- Maintenance / Support cost
- Licensing Cost

The vendor has to specify if a protection is offered in the event of inadequate support or withdrawal of the system from the market.

14. Product Questionnaire

Vendors must take note of the following keys when completing the questionnaire

Key: Vendor Rating

<i>0</i>	<i>1</i>	<i>2</i>
<i>Not catered at all</i>	<i>Catered in the System</i>	<i>System to be customised</i>

Key: Importance

<i>0</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>
<i>Not required at all</i>					<i>Absolutely critical</i>

14.1 Employee Management

The system must cater for personal employee information. Biographical and details of employment have to be stored and easily available for report purposes, etc. Employee Management details the questions to be asked regarding the way in which the Vendor's system handles the personal information of employees.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
<p>Fields to cater for are :</p> <ul style="list-style-type: none"> ○ Employee Number <ul style="list-style-type: none"> ▪ The system to allocate / generate an employee number automatically when new engagements are taken place. ○ Surname ○ Initials ○ First Names ○ Nick Name ○ Identity Number ○ Date of Birth ○ Age (calculated from DOB) ○ Race ○ Sex ○ Ethnic Origin ○ Religious orientation ○ Nationality ○ Visa status details ○ Marital Status ○ Medical Dependants (Adult / Child) ○ Medical Fund Membership number ○ Pension - / Provident Fund Details ○ Pension / Provident Fund Membership Number ○ Start Date ○ Disability details 		5	

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<ul style="list-style-type: none"> ○ Employee Status (Contract / Permanent) ○ Job Title Description ○ Position Number of the job <ul style="list-style-type: none"> ▪ Position vacant or occupied? ○ Organizational Structure <ul style="list-style-type: none"> ▪ Company Name ▪ Division / Business Unit ▪ Region ▪ Department ▪ Camp ▪ Pay point ▪ Location ▪ Cost Centre ▪ Position number ▪ Position Reporting line (reports to which position/Manager) ○ Salary Package detail (to pull automatically from Payroll) ○ Union Membership ○ Tax Country (ZA / BOT, etc) ○ Working Days(5 / 6 day) ○ Language ○ Home Address Details ○ Postal Address Details ○ Next of Kin details ○ Employee Contact details ○ Membership of professional bodies ○ Religious orientation details ○ Banking Details <ul style="list-style-type: none"> ▪ Bank Name ▪ Branch Code ▪ Account Number ▪ Type of Account ▪ Payment Method (transfer/ cheque/ Cash) ▪ Tax Reference number ▪ IRP3-directive number and % indicator ○ Security clearance details ○ Employee constraints regarding deployment, travel and transfer 			
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Employee Classification			
Does the system allow where the employee can be classified as hourly paid?			
Does the system allow where the employee can be classified as salaried?			
Does the system allow where the employee can be classified by job evaluation e.g. Hay points, Paterson, etc.?			
Does the system allow where the employee can be classified by employee group?			
Does the system allow where the employee can be classified by status e.g. active, terminated?			
Does the system allow where the employee can be classified as full time, part time, contract?			
Does the system allow where the employee can be classified as overtime eligible or ineligible?			
Does the system allow where the employee can be classified by cost centre?			
Does the system allow where the employee can be classified by payroll?			
Does the system allow where non employees can be classified as temporary?			
Does the system allow where non employees can be classified as contract?			
Does the system allow where non employees can be classified as supplier?			
Does the system allow where non employees can be classified as client?			
Does the system allow where non employees can be classified as consultant?			
Does the system allow where non employees can be classified as work experience?			
Does the system have the ability to record registration of professional bodies and registration number?			

Additional Functionality			
The system must have the ability: <ul style="list-style-type: none"> ○ To hold images such as photographic information, signatures and employee documents. <ul style="list-style-type: none"> ▪ Only if in BMP / GIF / JPG formats 			
The system should have fields available to allow the user to assign company property to an employee (e.g. PC's, mobile phones, etc.)			
The system must allow for defaults on certain fields where information is captured once and then filter throughout the system. E.g. <ul style="list-style-type: none"> ○ ID number - birth date field is automatically populated. ○ Start date - leave / sick leave start date is automatically populated with the same date. ○ Etc. 			

14.2 Job Profiles

The system should cater for detail job description and job specification for each position within the organisation. The client is making use of the Paterson job grading system. Job Profile and Grading details the questions to be asked regarding the way in which the Vendor's system handles the Job Profile and Grading processes.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Job Profile :			
Can the system cater for the following job profile information: <ul style="list-style-type: none"> ○ Duties / Tasks? ○ Skills? 		5	

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Requirement	Vendor Rating	Level of Importance	Vendor Comments
<ul style="list-style-type: none"> ○ Responsibilities? ○ Competencies? ○ Knowledge? ○ Abilities? 			
Is the job evaluation methods user define and user friendly?			
Is the position (job) information held dependently of the employee?			
On assignment of an employee to a job (position), is the position information inherited by the employee?			
Can the employment terms of conditions be assigned to a job (position)?			
Can employees be assigned to a job (position) using any unit of measure (e.g. all fixed conditions linked to the position, etc.)?			
Can job descriptions be held as a set of tasks, responsibilities or objectives?			
Can the system allow the user to assign pre-requisites and skills requirements to a particular job / position?			
Can skill type competency level requirements be set for a specific job / position?			
Is factor based job evaluation methods supported?			
Individual job requirements can be weighted?			
Can the scores be assigned for each of the job evaluation factors?			
Can job evaluation details be linked to employee appraisals?			
Can jobs / positions be classified as receiving overtime pay or not?			
<p>Can positions be created in the client's specific format? E.g.</p> <ul style="list-style-type: none"> ○ 601010050 <ul style="list-style-type: none"> • 60 - which division • 101 - grade code • 0050 - how many positions are authorised 			

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Requirement	Vendor Rating	Level of Importance	Vendor Comments
Can position numbers automatically be allocated by the system? Or should the client manage the numbers manually?			
Can certain jobs be linked to multiple holders? <ul style="list-style-type: none"> ○ One or Two or three employees sharing one job/position 			
Can employees be assigned to a single or multiple jobs? E.g. one employee performs: <ul style="list-style-type: none"> ○ Guard duties - 50% ○ Fuel Pump Attendant duties - 50% 			
Two or more employees are assigned to a job simultaneously? E.g. <ul style="list-style-type: none"> ○ You have one or two Camp Attendants sharing a full shift, (one works 4 hours and then the other Attendant works the other 4 hours) or ○ One week it is one Camp Attendant and next week it is somebody else? 			
Can employees be assigned to teams?			
Can employees be assigned to multiple teams?			
The system must have the ability to assign physical, mental & environmental factors to a job / position.			
Grading:			
The grade structures must be user defined and easily maintained.			
Can the remuneration levels be linked to grading structures?			
Can any rewards be linked to grading structures?			
Can the job grade be linked to the salary curve in order to allow comparison of earning of similar job grades?			

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Link job grades to years of experience?			
Link job grade to performing rating?			
Link job grade to academic achievements?			
Can the system assist with the identification of employees who are on the “fast track” achieving positions at a faster rate than normal?			
Record a history of grade jobs per employee and a date when the job grade changed?			
The system must have the ability to record details with regard to applications and appeals?			

14.3 Organisational and Planning

The system must be able to support the client’s organisational structure. Each position is linked to a cost centre. Organisational and planning details the questions to be asked regarding the way in which the Vendor’s system handles the Organisational and Planning processes.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
<p>The system should be able to reflect the organization structure of the client.</p> <ul style="list-style-type: none"> ▪ Company Name ▪ Division / Business Unit ▪ Region ▪ Department ▪ Camp ▪ Pay point ▪ Location ▪ Cost Centre ▪ Position number ▪ Position Reporting line (reports to which position/Manager) 		5	

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Requirement	Vendor Rating	Level of Importance	Vendor Comments
Can the organisational structure be displayed graphically?			
Can the system display line structures?			
Can multi level hierarchies be configured?			
Can budget information be attached to the hierarchies?			
Can actual headcount against budget information be viewed at any level?			
Can the system allow the user to create matrix structures?			
Does the system have the ability to enter and evaluate possible future organisational structures?			
Can external organisations be included within the hierarchies?			
When reorganisation of the company takes place, can the new reorganisation plan / structure be put on hold pending approval?			
If so, the planned position hierarchies can be automatically released for occupancy?			
Can the system display reorganisation results using charts and organograms?			
Will the system allow the user to have different plan versions to compare various scenarios?			
Does the system keep full history of any reorganisation plans / hierarchy structures?			
Does the system keep full history of the company's organisational structures and all changes to the structures?			
Is it possible for the automation (roll up to "Parent Company" level of the structure) if the cost centre is completed?			
Does the system make provision for positions within the structure?			
Does the system allow the possibility to create batch position numbers within a specific structure?			
Does the system make provision for : <ul style="list-style-type: none"> o Which position reports to which position? 			
Does the system allow for the splitting of payroll cost into different cost centres?			

Requirement	Vendor Rating	Level of Importance	Vendor Comments
<ul style="list-style-type: none"> ○ E.g. the work of overtime must be at another cost centre and not to the employee's main cost centre? ○ E.g. the salary must be split into a 25% / 75% split in cost centres? 			

14.4 Training

The client manages the company's training needs internally. Therefore they need a system to assist them with this important HR function. This section details the questions to be asked about the system approach to handling training.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Address the requirements / guidelines of the NQF (National Qualification Framework)?			
The system must allow for a training plan to be established for a job / position / title, and training required for certification for a profession.			
The system should assist the user with: <ul style="list-style-type: none"> ➤ Course Scheduling: <ul style="list-style-type: none"> ○ Courses ○ The minimum / maximum course numbers per course detail. ○ Venues ○ Resources ○ Facilities / Equipment 			
The system should assist the user with: <ul style="list-style-type: none"> ➤ Course Bookings: <ul style="list-style-type: none"> ○ Cancellations ○ Waiting lists 			

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Requirement	Vendor Rating	Level of Importance	Vendor Comments
The system should assist the user with: <ul style="list-style-type: none"> ➤ Course Completions: <ul style="list-style-type: none"> ○ Results ○ Assessments ○ Generation of certificates ○ Update employee records 			
The system must allow the user to record internally and externally training courses. <ul style="list-style-type: none"> ○ Internal Courses (name) ○ External Courses (name) ○ Cost of courses ○ Date of course 			
Be able to store exam results per course taken		5	
Be able to view availability of resources (tutors / Assessors / facilities)			
Is a diary facility available showing planned events by employee?			
Is the system able to store and maintain information on training service providers - be able to group according to courses offered			
Can the system store feedback on the courses run?			
The system should be able to link any number of competencies based courses to an employee.			
Be able to record the employee's personal development plans			
Be able to track and monitor personal development plans.			
The master training plan must be linked to the job categories and requirements of each job / position.			
The system should be able to maintain internal and external training records for employees.			
Keep track which mandatory training courses are available for certain job categories.			
The system should cater for a training budget whereby it can be maintained and reported.			

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Requirement	Vendor Rating	Level of Importance	Vendor Comments
<p>Can the system provide a total course training cost based on various costing factors for example:</p> <ul style="list-style-type: none"> ○ Venue cost ○ Course cost ○ Resource cost ○ Direct or indirect cost 			
Can the training cost be allocated to the appropriated cost centre?			
Can the system track the costs of learners/apprenticeships			
Can the system record courses being taken by employees?			
Is the functionality available to keep track of employees who have been on training?			
Be able to store demographic information?			
Need to be able to keep track of the skills of employees.			
Can the system accommodate the on-line registration of delegates and produce automatic e-mail authorizations? (workflow)			
Does the system cater for the automatic sending of confirmation notification? (workflow)			
System is to track the number of seats taken/still open for a given course			
System to track courses cancelled/confirmed and send out a notification according to the 2-week notice period			
Courses should be advertised on the intranet. Can a link be created between the system and the intranet?			
Before training has commenced, is the system able to track the respondents (whether accepted, tentative or declined) and produce a report thereof?			
Can the system track delegate hours and numbers?			
Does the system allow for the tracking and storing of training costs			
Can the system generate a reminder based on a flag, e.g. when employees are writing exams			
Be able to scan and record certificates employees receive for			

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
courses			
Rules should be built into the system depending on the certificate received, e.g. marriage certificate or training certificate			
Is the system able to track bursaries?			
Is it possible to flag a bursary candidate, so that in the event that the candidate was to fail the consultant would be aware that the bursary is to be repaid in 12 months?			
Can the system cater for study leave entitlements, e.g. a maximum of 10 days can be taken per annum?			
The system must support the Full Time Education and Training Options of New Deal.			
Where the status of achievements can be viewed on line?			
Where a user can view the employee achievement against the training plan?			
Where the user can define a course type (e.g. personal development, skill or career)?			
Where a competence based qualification course can be tracked?			
Where template training questionnaires can be maintained and stored?			
Where training appraisal forms can be maintained and stored?			
From these course questionnaires, produce statistics?			
Where standard training course material can be maintained			
Where tuition re-imbusement detail can be recorded			
Where non employees can register for courses and be maintained for invoicing purposes?			
Can it generate various training reports?			
Does it have a mechanism to include learner management process e.g. PDP information etc. in the reports?			

14.5 Employee Relations

There are procedures that employees and employers should follow in case of disputes, grievances, and disciplinary action and appeals. This section details the questions to be asked about the system approach to handling all Employee Relation matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
<p>The system should allow the user to record information related to:</p> <ul style="list-style-type: none"> ○ Union Membership? ○ Grievances including gender and race? ○ Disciplinary actions/ Offences including gender and race? ○ Counselling sessions ○ Warnings ○ Paid suspensions ○ Demotions ○ Transfers ○ Unpaid Suspensions ○ Appeals? ○ Disputes ○ Unfair labour practices/grievances ○ CCMA Cases? ○ Conciliation ○ Arbitration ○ Labour Court Cases ○ Case History? ○ Counselling? ○ Shop Stewards Leave ○ Shop Stewards Term of Office 		5	
<p>Is it possible to:</p> <ul style="list-style-type: none"> ○ Link employees to cases and calculate the cost of participation? ○ Track industrial action trends? 			

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Requirement	Vendor Rating	Level of Importance	Vendor Comments
<ul style="list-style-type: none"> ○ Track discipline from grievance to labour court / CCMA? ○ Calculate loss of earnings for strike action? ○ Easy termination after dismissal ○ Easy re-instatement of employee after CCMA ruling? ○ Easy payment of CCMA Settlement Agreement 			
Does the system create and maintain a procedure manual itemising the steps to follow in the case of disciplinary actions?			
Can the system provide a selection table for Issues to choose from, e.g. Grievance, Misconduct, Retrenchment, absconsions, Poor Performance, Retirement details etc?			
Does the system create and maintain a procedure manual itemising the steps to follow in the case of grievances?			
Does the system create and maintain a procedure manual itemising the steps to follow in the case of a protected strike?			
Can the system provide a selection table for Nature of Concerns to choose from, e.g. Conflict with Manager, Conflict with Colleague, Alleged unfair treatment etc?			
Can the system provide a selection table for Interventions, e.g. Consultation with Manager, Consultation with Employee, Drafting of letter etc?			
Can the system provide a selection table for the status of the ER issue, e.g. In Process, In Consultation, Finalised etc?			
Can it generate various ER reports?			

14.6 Employment Equity

The system should assist / provide management with EE information according to the Department of Labour requirements. This section details the questions to be asked about the system approach to handling all Employment Equity matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Is the module fully compliant with legislative requirements?			
Does the system allows the user to forecast the companies EE plan, and displays the data in tubular or graphical format?			
Can planning and reporting be done on any level in the organisation structure?			
Are previous submissions (history) to the Department of Labour stored and available to the user?			
Are the reports generated in the format required by the Department of Labour?			
Can the module interfaces with (to or from) 3 rd party systems?			

14.7 Development Management

In order to monitor and control the career development of employees, it is necessary to record that they achieve their own personal goals and those of the company. This section details the questions to be asked about the system approach to handling all Development Management (Career and Succession planning) matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Is the system allowing for recording of development information? : <ul style="list-style-type: none"> ○ Skills ○ Training Courses ○ Experience. 		5	

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Requirement	Vendor Rating	Level of Importance	Vendor Comments
<p>To assist with gap analysis, performance management and career management? :</p> <ul style="list-style-type: none"> ○ Career Paths ○ Employee Profiling ○ Success Planning ○ Performance Management 			
Competencies			
You can define multiple competencies i.e. a measurable behaviour required by the organisation, job or position?			
Competencies can be applied to an employee, applicant or contractor.			
A competence profile can be held for each person and the level of proficiency they display in these competencies.			
You can identify the proficiency at which the competency is performed.			
You define multiple proficiency levels for a competence.			
You can associate behavioural characteristics displayed with a competence.			
For each proficiency level you can define what behaviours to detect.			
For each proficiency level you can define the tests to use.			
For each proficiency level you can define when to review the proficiency.			
<p>Instead of defining proficiency levels for individual competencies you can use a general rating scale for measuring several competencies - e.g.</p> <p>1 = expert, 2 = intermediate, 3 = beginner.</p>			
You can make one rating scale the default?			

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Requirement	Vendor Rating	Level of Importance	Vendor Comments
You can create competence types e.g. management skills could be divided into several competencies.			
You can group a competence into more than one competence type e.g. presentation skills could be in management skills and interpersonal relationships.			
You can define a competence at a group level.			
You can define competence requirements at the organisation level.			
You can define competence requirements at the job level.			
You can define competence levels at the position level.			
You can define a one off profile e.g. if you are matching a group of people for suitability.			
If required, you can define different competencies for different grades.			
If you define competencies only at the group or organisation level they are displayed each time you select a specific organisation or job.			
If you hold competencies at the position level, when you select that position the relevant competencies for the organisation, job and position are inherited and displayed.			
You can copy competencies and proficiency levels and then amend accordingly.			
You can identify whether a competence is a essential e.g. when you are matching for suitability only those people who have the competence at the proficiency level required will be selected.			
You can hold the number of years of experience that a person has in using skills.			
Qualifications			
Competencies can have identified qualification methods e.g. driving licence, test.			

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Requirement	Vendor Rating	Level of Importance	Vendor Comments
You can enter different types of qualification e.g. degrees, other educational qualifications, licences etc.			
You can rank each qualification type e.g. for a degree 1 = first, 2 = 2:1, 3 = 2.2 etc.			
You can rank equivalent qualifications at the same level?			
Appraisals			
You can create appraisal templates?			
You can attach appraisal instructions to the template?			
Employees can initiate a self appraisal i.e. want to rate their own performance?			
An employee can initiate a 360 degree appraisal and select managers and reviewers to take part in the appraisal?			
For self appraisals or 360 degree appraisals the employee can access the competence evaluation?			
A group appraisal can be initiated by a manager to include multiple participants?			
For the appraisal you can measure and record a score how a person has scored against a given set of competencies.			
You can use the appraisal template to identify the pre-defined set of competencies to be assessed for proficiency or performance.			
A proficiency based appraisal can measure the expectation of the level to which a person exhibits a competence.			
For an appraisal you can set future expectations that a person will have achieved a proficiency level.			
For an appraisal you can rank a persons performance against a proficiency in an appraisal.			
You can rank a persons performance in a appraisal.			
You can apply weightings to performance or proficiency of an employee in an appraisal.			

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
You can calculate an appraisal assessed by proficiency and performance by multiplying proficiency and performance.			
You can calculate an appraisal of proficiency and performance with weighting applied to performance and then calculating the score by multiplying performance and weighting.			
You can calculate an appraisal of proficiency and performance with weighting and performance with weighting applied to proficiency and then calculating the score by proficiency by weighting.			
For an assessment of an appraisal you can create an overall total and average total.			
For an assessment of an appraisal you can create a weighted total or average for both performance and proficiency.			
You can attach a set of user instructions to complete the appraisal?			
You can record a set of objectives for the employee?			
You can set success criteria that can be monitored and assessed?			
Once an appraisal is complete and published managers and employees have available to them a full history?			
Suitability Matching			
You can compare a person against succession options for that person?			
You can compare a person against their current assignments?			
You can take a selected group and rank then against the requirements of a selected organisation, job or position whether vacant or currently occupied?			
You can take an organisation and compare current occupants with the needs of the role?			
You can take a job or position and compare current occupants with the needs of the role?			

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Requirement	Vendor Rating	Level of Importance	Vendor Comments
You can take a job or position and compare successors for that position?			
You can refine a suitability search by specifying that you want to search for people with a proficiency level in a specific competence, at a required level or above and below?			
You can restrict a search by identifying required and optional competencies and work choices?			
Career and Succession Planning			
Can you record a persons work choices e.g. willingness to travel?			
Can you compare the work choices with the work requirements of jobs and positions?			
Once you have a short list of successors to a position after you have performed a suitability matching, can you perform a suitability match to show training needs?			
Once you have a short list of successors to a position after you have performed a suitability matching, can you rank potential successors?			
Can you define a career path to show progression to one job or position from any number of other jobs and positions?			
Can you define as many career paths as you require?			
Can you define and display a career path graphically?			
Can you hold time intervals e.g. immediate, two years etc?			
Can you record employee names against each job for each time interval?			
If you base your career and succession planning on positions, can you create additional hierarchies to show any type of progression?			
Career planning can be current			
Career planning can be short term			
Career planning can be long term			
High potential employees can be flagged?			
High performing employees can be flagged?			

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Can a graphical succession hierarchy be built for key positions?			
Can multiple successors be nominated for a single position over time?			

14.8 Recruitment / Applicant Tracking

To apply the company's own recruitment strategies within the confines of current legislative practices. Applicant tracking details the questions to be asked regarding the way in which the Vendor's system handles the recording of applicant information as the applicant progresses through the selection process.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
If the job offer is accepted, can the master data captured in the "Recruitment" module be transferred to the other modules, including the payroll details like salary, etc - One point of capturing?		5	
Does the module allows for: <ul style="list-style-type: none"> o Vacancy Management? o Applicant Tracking? o Candidate Selection? o Interview? o Job Offers (Salary Structuring)? o Appointment? 			
Vacancies:			
Does the system allow the user to record the person's detail who authorised the vacancy?			
To record the person who is responsible for the recruitment of the vacancy?			
To record the location of the vacancy?			

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The contract type pertinent to the vacancy can be recorded?			
The salary range for the vacancy can be recorded?			
Can the On Target Earnings (OTE) range be recorded for the vacancy?			
Can the holiday allowance for the vacancy be recorded?			
The normal working hours for the vacancy can be recorded			
The overtime payable for the vacancy can be defined			
The flexi time for the vacancy can be defined			
Can define whether the vacancy is entitled to a company pension?			
Can Define whether the vacancy is entitled to relocation expenses?			
The company car allowed for the vacancy can be defined?			
Can the system allow for the user to complete a pre-employment medical questionnaire?			
Dependent on the position / grade of the vacancy, the benefit entitlements are automatically defaulted?			
The employee can define their own benefits e.g. luncheon vouchers, season ticket loan etc.			
A car allowance for the vacancy can be defined?			
The full value of the package for the vacancy can be calculated?			
You can view lists of all vacancies by selected organisation / division?			
You can view lists of all vacancies by selected location?			
You can view lists of vacancies by selected job?			
You can view lists of all vacancies by position?			
You can view lists of all vacancies by selected recruiting person / department?			
A vacancy can have more than one opening?			
You can view lists of all vacancies by selected grade?			
Applicant status can be used to automatically generate standard letters?			
Any number of template letters can be maintained?			
Entering Applicant Details			
Is it possible to capture only key information about an applicant and link a scanned copy of the applicants Curriculum vitae / resumes in the			

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
system? Personal details e.g. Surname, Initials, Names, ID number, Date Of Birth, Marital Status, Ethnic Origin, Religion Orientation, Sex, Disability, Nationality, etc.			
The system automatically generates a unique number per applicant and cross references to the vacancy?			
Multiple contact details for an applicant can be recorded?			
You can indicate whether it is okay to telephone an applicant at their current work number?			
You can indicate whether it is an internal or external applicant?			
If the application is from an existing employee, can the existing employment details of the applicant be reflected?			
The current salary of the applicant can be recorded?			
The start and end rate of salary for the applicant can be recorded?			
User can record candidates expected pay?			
User can record applicants expected benefits?			
User can record applicant's willingness to relocate?			
User can record applicant's willingness to travel?			
The current benefits of the applicant can be recorded?			
The notice period that the applicant has to give can be held?			
The earliest possible start date for an applicant can be recorded?			
Details of educational establishments with dates attended by the applicant can be recorded?			
Multiple qualification details can be recorded with dates per applicant?			
Responsibilities held by an applicant can be held?			
Positions held by the applicant can be recorded?			
An applicant can apply for more than one open vacancy?			
Previous applicants are automatically identified?			
If an alert message is displayed because the applicant has applied previously for a vacancy, the user can drill down to see the relevant historical information on that applicant?			

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Application form information can be interfaced through Optical Character Recognition (OCR)? <ul style="list-style-type: none"> ○ A functionality where the completion of the application form by the applicant is stored and then uploaded into the system 			
You can query groups of applicants and update them as a group? E.g. <ul style="list-style-type: none"> ○ When changes are made to one group's Travel Allowance, all incumbents in the group are automatically changed 			
Be able to record willingness to use own car?			
Scheduling an Interview			
You can define an interview type?			
You can select a location and time?			
The employee (s) to undertake the interview can be selected?			
An interview panel can be created and scheduled?			
A room can be booked?			
Ability to record special needs required for an interview e.g. disabled access etc?			
Tracking Applicant Progress			
You can set an effective date that you want the application process to commence?			
You can enter a close date for an application to be received?			
You can define your own application status e.g. first interview, offer made, offer accepted etc.			
You can query groups of applicants and update them as a group?			
You can refer a group of applicants form one recruiter / interviewer to another?			
You can change the status of applicant assignments?			

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Applicant Suitability Matching			
You can enter competence requirements for jobs?			
You can enter competence requirements for positions?			
You can enter competence requirements for organisations?			
You can compare the competence profiles of your applicants against the requirements of the vacancy?			
You can enter a work choice e.g. willingness to relocate, willingness to travel with job?			
You can hold a person or job specification as an attachment?			
You can match applicants on their education?			
You can match applicants on their qualifications?			
Candidates can be prioritised according to the number of matching criteria found?			
Candidates on redeployment can be identified?			
Advertising			
For each vacancy you can record from which advertisement / publication the applicant saw the vacancy?			
The application source can be recorded e.g. advertisement, employee who referred the application etc.			
For a specific recruitment campaign you can compare the number of responses that have been received for each advertisement placed?			
Contact details of the media organisation can be recorded?			
Rate cards can be held for each approved media supplier?			
Copy dates for media can be input?			
Job descriptions can be automatically referred to as a model for an advertisement?			
Copy advertisements can be stored, copied and amended? <ul style="list-style-type: none"> ○ Only if it is in BMP / GIF / JPG format 			

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Checklist			
For each applicant you can create a checklist of required information or tasks to have been completed can be displayed?			
You can view whether a medical check clearance has been given?			
You can view whether a police screen has been completed satisfactorily?			
You can view whether a security check has been completed?			
You can view whether driving licence details have been checked?			
You can view whether education / qualification details have been checked?			
You can view whether visa details have been checked?			
You can view whether references have been checked?			
You can view whether the contract of employment has been sent to the applicant?			
You can view whether the start date has been confirmed?			
Ability to record CRB check and the level? <ul style="list-style-type: none"> ○ The system should allow the user to indicate whether a Credit Bureau check has been carried out with comments? ○ For certain critical jobs, can the system warn the user upfront when the CRB check has not been carried out? 			
Ability to record the type of security check carried out e.g. List 99, Local Auth etc.			
Ability to record referees details?			
Can we take up reference prior to the interview?			
Selection			
When an application is declined, there can be a number of reasons. Is it possible to store a number of possible reject letters in the system allowing the user to select the relevant letter? It should be possible to			

Requirement	Vendor Rating	Level of Importance	Vendor Comments
automatically populate the letter once selected. Can the letter be emailed?			
Does the system cater for tracking of the various "stages" the applicant goes through before being accepted?			
Can the system record comments made by various parties interviewing the candidate?			
Is it possible to generate an automatic Letter of Appointment (LOA) once the applicants' status has been changed to accepted?			
Potential staff/agencies apply online on SANParks.com. Can CV's be interfaced to the system with relevant details?			
Can the system automatically e-mail regret letters to candidates when the CV state changes to Regret status? This is applicable only if the candidate has an e-mail address.			
In the positions list, the default status for a position should default to 'Vacant' status			
Once a CV has been received through an online application form (either from an Agency or directly from the candidate), the assigned consultant should be notified via e-mail of the receipt of the CV			
When a CV is received in hardcopy and loaded manually on the system, the system should allow an option as to whether the assigned consultant should be notified via e-mail or not notified at all			
Can the system hold a template set of Regret letters we are able to select from?			
The system user should have an option to select the appropriate regret letter before it is automatically e-mailed to the candidate.			

14.9 Resource Planning

Resource Planning details the questions to be asked regarding the way in which the Vendor's system handles the recording of applicant information of the Resources Planning function.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Be able to control and monitor the Headcount?		5	
Be able to calculate Labour turnover figures?			
Full time equivalents (FTE) can be user defined e.g. <ul style="list-style-type: none"> o 1.0, 0.5, etc 			
FTE can be calculated based on the ratio of standard hours for a job to actual hours worked by the employee.			
FTE can be calculated based on the ratio of standard earnings for a job to actual earnings by the employee.			
For budgetary purposes, job positions can be calculated by FTE?			
For budgetary purposes, job positions can be calculated in money terms?			
Can Budget history of a position be recorded?			
Can Current position costs be recorded?			
Can Costs by employee be recorded?			
Can Variances to budget be reported?			

14.10 Health and Safety

This section details the questions to be asked about the system approach to handling all Health and Safety matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Be able to record all health and safety incidents / accidents?		5	
Unlimited accident codes to be defined?			
Where lost time due to accidents can be recorded?			
Automatic allocation / generation of an accident claim reference number?			
Compensation claims can be tracked?			

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Hazardous chemical register is available?			
Inspections can be tracked?			
Inspections can be classified as statutory or not?			
Automatic reminder facility of when inspections are due?			

14.11 Salary Modelling

The management of SANParks makes changes to compensation. The management needs system assistance with the measuring of the financial effect of these changes for the company or to individuals.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Salary modelling can be undertaken?		5	
Analysis can be by job or grade			
Analysis can be made in multi company scenarios			
Costing breakdowns can be extracted			
Budget versus actual can be compared			
User can compare budget versus actual on any element of the organisational structure			
User can compare budget versus actual by grade or job			

14.12 Self-Service

Employees of SANParks are empowered to manage their own personal data. This section details the issues to be discussed and demonstrated relating to tasks which are initiated/can be performed by employees. For example, this involves: requesting leave; benefit modeling; change of dependants; requesting training, etc.

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Personal information / Data to be updated are : <ul style="list-style-type: none"> ○ Family Details ○ Address Details ○ Banking Details ○ Marital Status ○ Beneficiary details ○ Skills ○ Qualifications ○ Educational attendance ○ Curriculum Vitae 		5	
Can the system allow the employee to view their own pay slips?			
Apply for Leave and check their leave balances? <ul style="list-style-type: none"> ○ View their absence history? ○ View outstanding holiday entitlements? 			
Apply to attend Training Courses?			
Automatic e-mail messages are sending to Managerial staff when leave is applied by their sub-ordinates?			
Automatic reminder to the Manager if the leave application has not been addressed within 24 hours?			
Automatic e-mail messages are sent to the applicant when the leave application is approved / declined by their Manager?			
Managers manage their sub-ordinates. <ul style="list-style-type: none"> ○ Approve leave applications ○ Approve training requests ○ Manage EE & Training Budgets ○ Manage Headcounts 			
Employees can enter review and update qualifications, awards etc			
Employees can perform appraisals			

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Employees can update competence profiles			
The system should allow the user to change their passwords?			
The system should cater for a full audit trail of changes made by employees.			
Generate a real-time leave report with actual balances and transactions during a selected period.			
Must be able to track encashment of leave and interface with payroll for the purposes of payment.			
Does the Employee Self Service module allow for pay slips to be delivered to the employees should the employee have a pc or e-mail address? Can hardcopies be printed for those staff that does not have computers.			
Is it possible to create rules for the Employee Self Service module for when specific changes are made, for e.g. an employee changes her name when she gets married, the rule will require a marriage certificate to be supplied before the change takes place?			
Can the system cater for a company car scheme, car repayments and interest calculations?			

15. Human Resources Events

Vendors must take note of the following keys when completing the questionnaire

Key: Vendor Rating

<i>0</i>	<i>1</i>	<i>2</i>
<i>Not catered at all</i>	<i>Catered in the System</i>	<i>System to be customised</i>

Key: Importance

<i>0</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>
<i>Not required at all</i>					<i>Absolutely critical</i>

15.1 New Starter

Employees are employed and the system has to be updated with the master data of the employee for pay purposes and other management functions. This section details issues relating to the initial process following the employee’s acceptance of the position offered.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
New engagement event should allow the user to complete the minimal fields / screens.		5	
The system should pre populate certain fields / auto complete the fields. For example:		5	

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
<ul style="list-style-type: none"> ○ Capture ID number - system to auto complete “Date of Birth” (DOB) field 			
Decline mismatched event codes captured by user than the available codes in drop down box.			
Age to be quoted next to “DOB” field.			
Validation on certain personal information fields : <ul style="list-style-type: none"> ○ ID / DOB ○ Tax Reference Number ○ Bank Branch code 			
When the payroll is run for the new employee, and the date of engagement is after the first day of the pay month, the system will calculate pro-rata payments?			
You can either choose from a list of existing templates or you can use an existing employee as the basis for a new template?			
The software also automatically prompts you to add another employee without having to go through the menu options over and over again			
Can the system cater for Benefits Modeling?			
If so, can it be offered as part of the Employee Self Service function?			
Is it possible to create an employee file consisting of demographic information and employment information, along with linking to scanned documents, for e.g. Scanned image of ID, Certificates (marriage, qualifications, etc.)?			
Can the system automatically generate employee numbers and are we able to decide from which number we would like the automated selection to start?			
Once a CV has been received and the status has been changed to placed, is the data immediately available for reporting and payroll capturing purposes in the HR database?			

15.2 Termination

Employees are leaving the service of the company. This section details the questions to be asked about the system approach to handling all termination (leaver) matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
<p>A termination event should allow the user to complete the minimal fields.</p> <ul style="list-style-type: none"> ➤ 3 - Field screen <ul style="list-style-type: none"> ○ Employee code ○ Term Date ○ Reason Code 		5	
Permanent Pay Allowances and Deductions should be expired automatically at the last day of service or the calendar month.			
All outstanding loan balances must automatically recovered from the final pay slip of an employee. If not, can the system warn the user with a message that a loan is still outstanding?			
When the final payroll is run for the leaver, and the date of exit is prior to the last day of the pay month, the system will calculate pro-rata payments?			
Retirements			
<p>Retirements of age cases</p> <ul style="list-style-type: none"> ○ The normal retirement age is 65 years of age? ○ System to generate / prompt a message who will retire shortly (3 months prior to date)? 			
Can the system generate with a termination event automatically a termination notification?			
Exit Interview			
System must allow recording of exit interview detail :			

Requirement	Vendor Rating	Level of Importance	Vendor Comments
<ul style="list-style-type: none"> ○ Date of exit interview? ○ Interviewer? ○ Suitable for re-employment - Yes/No? ○ Exit Interview comments columns? 			

15.3 RE-Instatement of Employees

Employees may be re-instated after certain decisions have been made by the company's management. This section details the questions to be asked about the system approach to handling all Re-Instatement of employee matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Employees are re-instated on the basis of: <ul style="list-style-type: none"> ○ Re-employment with broken service periods. ○ Rolling of temporary contracts. ○ Cancellation of terminations. ○ Change in termination dates 		5	
Contracts are received for a specific period of service which are then renewed <ul style="list-style-type: none"> ○ Continues period? 			
The system should handle a re-instatement process correctly i.e. <ul style="list-style-type: none"> ○ Terminated - 12/10/2005 ○ Re-instated - 24/10/2005 			
Are the payslip results for both periods of service e.g. within October			

Requirement	Vendor Rating	Level of Importance	Vendor Comments
2005 pay month stored and tax correctly calculated?			
Are IRP5 certificates issued for both periods of service?			
Can the system handle re-instatement procedures?			
Please describe shortly the system procedure to follow with this requirement. <ul style="list-style-type: none"> ○ Is it user friendly? ○ Is it a long process where a few screens have to be updated with employee information? 			

15.4 Promotions

The system must allow for promotions. Some promotions are by grade or position, by skill or competencies or lateral transfers without physically moving location. The employee grade or position (job title) and associated remuneration benefits and conditions may change. This section details the questions to be asked about the system approach to handling all promotion matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The promotion may indicate an increase in salary.			
The system must allow for backdated promotions and remuneration.			
The employee's organisational structure information may change.			
The system must produce automatically a pre-defined promotion document after the change has been saved.			

15.5 Transfers and Secondments

The transfer may take place between offices, countries and departments. Secondments are for a period of time. This section details the questions to be asked about the system approach to handling all transfer and secondment matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The system must allow where an employee has been transferred / seconded and create a relevant record.			
The system must allow for the duration of the secondment and any commitments on returning from secondment.			
With a secondment, a record must be created where the payroll is impacted. E.g. still contributing to pension / provident fund or still on medical aid or dormant for payroll, etc.			
The employee's organisational structure information may change.			
The system must produce automatically a pre-defined transfer / secondment document after the change has been saved.			

15.6 Employee Information Changes

The system must allow changes to be made to employee details. Only certain fields may be changed on an employee record - therefore access must be restricted. This section details the questions to be asked about the system approach to handling all data change matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Changes to certain employee detail have to be made on authorisation of management / employee and the system must allow the user to update the information accordingly.		5	
Where changes are made a change note must be produced to provide a physical record of changes.			
Various reason codes are used with the changes / movements.			
The system must provide a full sequential audit trail.			
The system must produce automatically a pre-defined record of change document after the change has been saved.			

15.7 Employment History Screen

This section details the questions to be asked about the system approach to handling all employment history matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
A single screen with the internal work history of an employee (with effective / expiry dates) should be available. Can the system cater for this requirement?		5	

16. Payroll System Functionalities

This section details the questions to be asked about the system approach to handling all payroll functionalities required.

Vendors must take note of the following keys when completing the questionnaire

Key: Vendor Rating

<i>0</i>	<i>1</i>	<i>2</i>
<i>Not catered at all</i>	<i>Catered in the System</i>	<i>System to be customised</i>

Key: Importance

<i>0</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>
<i>Not required at all</i>					<i>Absolutely critical</i>

16.1 Payroll: Cost Component Requirements

The client makes use of unlimited different cost components in the payroll. This section details the questions to be asked about the system approach to handling all payroll component matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
<p>Can the client set up different types of Cost components in the system?</p> <ul style="list-style-type: none"> ○ A - Earnings / Allowances <ul style="list-style-type: none"> • (total of ± 250 different earning types) ○ B - Deductions <ul style="list-style-type: none"> • (total of ± 300 different deduction types) ○ C - Company Cost <ul style="list-style-type: none"> • (total of ± 30 different company cost types) ○ D - Other Cost / Fringe Benefits <ul style="list-style-type: none"> • (total of ± 60 different other cost / fringe benefits types) 		5	
<p>Each component has usually its own rule / requirement / or auto load (automatic creation). The system can allow for these requirements?</p>			
<p>The rules per component can be down to field level and can differ between business units / divisions or job category.</p>			
<p>The values must be reflected in the current month's reports / GL Interface.</p>			
<p>Cost components must be linked to the GL Account number.</p>			
<p>Cost components must be linked to the IRP5 requirements / source codes.</p>			

16.2 Payroll: Import of Data Facility

The client receives bulk payroll input documentation from business units, departments, regions and requires a facility to import this information into the system without manual capturing actions. This section details the questions to be asked about the system approach to handling of import data.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Does the system have a facility available to import payroll information into the system for : <ul style="list-style-type: none"> ○ Temporary Pay Entries ○ Permanent Pay Entries 		5	

16.3 Payroll: Employee Payroll Categories

The client has several employee categories with its own rules. This section details the questions to be asked about the system approach to handling different employee categories.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Can the system cater for different types of employee categories namely: <ul style="list-style-type: none"> ○ Executives? ○ Non-Executive Personnel (Normal Employees)? ○ Board Members? ○ Temps or Contractors? ○ Casuals? ○ Learners? 		5	
Can the system handle the working of shift patterns for weekly and bi-			

Requirement	Vendor Rating	Level of Importance	Vendor Comments
weekly paid employees?			
Payroll can be run for all employees, selective groups or individuals?			

16.4 Payroll: Fast Entry Screen

The client receives bulk payroll information from employees and requires a fast entry screen for bulk capturing of the same information. This section details the way in which the system handles the fast entry screen procedures.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The system should cater for bulk capturing of payroll information - fast entries.		5	
The system should verify / check the data capture (employee number, if the cost component code exists, etc.) before saving the data.			
The system must not “save” if the “check” button is not used first.			

16.5 Payroll: Foreign Employees

The client employs also foreign employees. In the company, employees are employed in different countries namely:

- Botswana
- Namibia
- Zambia
- Swaziland
- Zimbabwe
- Lesotho
- Mozambique

- o Malawi

Different tax years are in place with other countries.

This section details the questions to be asked about the system approach to handling all payroll foreign matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The client needs different reports for the foreign employee groups.			
The client needs a Tax Indicator to calculate the correct tax of the country involved.			
Can the system allow for different countries legislative requirements?			
Can the system handles different countries requirements within the same centralized database?			
Different countries - multi currency capability <ul style="list-style-type: none"> o Can the system convert the values into foreign currencies? 			

16.6 Payroll: Tax Routines

Employees may choose between different tax method routines:

- o An average working day tax routine (where the tax is average the same) or
- o An average annualised tax routine (where the tax differ according to the total of calendar days in the month)

This section details the questions to be asked about the system approach to handling all payroll tax routine matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Does the system handles different tax method routines on the tax calculations?		5	

Requirement	Vendor Rating	Level of Importance	Vendor Comments
<p>Could the client request to have different tax routines selections available as per the employee's own option?</p> <ul style="list-style-type: none"> ○ Annualised average monthly ○ Annualised average working days 			

16.7 Payroll: Withhold of Pay

The Client's HR department is advised late but before the final pay run procedure to with hold the salary of an employee. The user needs to stop the salary of an employee.

This section details the questions to be asked about the system approach to handling withhold of pay matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
<p>Could the salary be withheld at the last moment before the final run is activated? If yes - what happens with the preliminary pay run results?</p>		5	
<p>What if the pay run went through but the Bank file is not run yet? What procedure has to be followed on the system?</p>			

16.8 Payroll: On-Screen Pay Slip Results

The client needs to view salary payslip results on the screen without printing a payslip.

This section details the questions to be asked about the system approach to handling all payroll pay slip matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Is a screen available where the results can be viewed?			
Is a “Select” button available to view: <ul style="list-style-type: none"> ○ The different code types separately i.e. <ul style="list-style-type: none"> • A - Allowances or • B - Deductions or • C - Company Cost • D - Other Cost 			

16.9 Payroll: On-Screen Pay Slip Result Comparison

The client needs to view salary payslip results compared with the previous pay month without printing the payslips.

This section details the questions to be asked about the system approach to handling all pay slip comparison matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Is a screen available where the current pay month’s results are compared with the previous pay month pay slip?		5	
Is a “Select” button available to view: <ul style="list-style-type: none"> ○ The different code types separately i.e. <ul style="list-style-type: none"> • A - Allowances or • B - Deductions or • C - Company Cost • D - Other Cost 			
Variance in pay comparison with previous pay period by a user defined amount or percentage?			

16.10 Payroll: Statuary Requirements

Statuary requirements and values of certain cost components have to be stored / captured. The client needs to update the system with the new changed values in a user friendly way.

This section details the questions to be asked about the system approach to handling all payroll statuary matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Is the statuary values easy maintainable?			
Information to be expirer and created are for example : <ul style="list-style-type: none"> ○ Tax tables ○ UIF % and Threshold ○ Pension Contributions % ○ Medical Scheme Contributions ○ Trade Union Fees (%), ○ Etc. 		5	
Is the client able to change these values self in a table or is the vendor the only authorized user to update these values for the client on request?			

16.11 Payroll: Salary Structuring

The client has different salary structures i.e.:

- Cost to company (CTC).
- Normal Pay.

Some employee's salary structures are individually based. Other jobs have fixed salary notches and all increases are authorized to take place within these salary bands.

This section details the questions to be asked about the system approach to handling all payroll salary structuring matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Can the system handle different salary structures as per the client's requirements?		5	

16.12 Payroll: Future Transactions

The client makes decisions whereby future transactions are authorized well in advance. Transactions could be:

- Terminations,
- Promotions,
- Employment status,
- Salary Increases,
- Incentive Bonus,
- Etc.

This section details the questions to be asked about the system approach to handling all payroll future transaction matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Does the system allow for these future payroll and HR transactions?		5	
The system to provide the user with a report on all "awaiting future transactions".			

16.13 Payroll: Retro Calculations

The client make decisions with regard to certain HR and Payroll matters after the final pay run date. Therefore the results for the previous pay month should be corrected and paid in the new (current) pay month.

This section details the questions to be asked about the system approach to handling all retro transaction matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Does the system allow the user to correct the input in the pay month where it was incorrectly calculated / paid?		5	
Does the system allow the user to “retro calc” an employee’s payroll result where necessary?			
Does the system auto re-calculate all implications on the retro transaction i.e. <ul style="list-style-type: none"> ○ Tax, Pension, UIF, SDL, Net Pay, etc. ? 			
Original GL Interface amounts not to be changed by the retro but included in the current pay month?			
The system to provide retro reports			
Retro Payments / deductions to be reflected on final pay payslip of the new pay month?			

16.14 Payroll: Interim Runs

After the final pay run, the client’s HR department receive late payments from divisions, departments or regions to be paid immediately to the employees. The client usually indicates what tax % or PAYE amount or the employee average tax rate % to recover from the employees with interim run. The interim run will be properly managed by the client - one interim run per week.

This section details the questions to be asked about the system approach to handling all interim payroll run matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Does the system cater for an interim run requirement?		5	
Does the system cater for the interim run pay slip?			
Can the interim run net pay result be paid to the employee via an EFT bank transfer file?			
The Interim Payments / deductions to be reflected on the final pay payslip and GL Interface of the pay month.			
Can the system split the interim run results from the main run results and from the GL Interface?			
Can you have an interim run GL Interface if so requested?			
Can the system provide interim run reports?			

16.15 Payroll: Payment after Termination Date

Employees are terminated and then authorisation is received to pay outstanding allowances / payments to the employee after the employee has left the service of the company.

This section details the questions to be asked about the system approach to handling all transactions after termination date matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
How does the system cater for these types of transactions that take place after the termination date?		5	
With this procedure of payment / recovering of deductions, should the employee be re-instated?			
The values must be reflected in the current month's reports / GL Interface?			
Are the values included in the IRP5 certificate totals?			

16.16 Payroll: Payment of Net Pay Salaries

The client would like to pay all employees through a bank EFT file. Employees belong to different banks. The pay date is on the 27th of a month (or the last Friday before if the 27th is on a Saturday or Sunday).

The client makes currently use of the FNB PACS EFT bank facility.

This section relates to the way in which the system handles payments to employees.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Can the system make payments via EFT for net salaries		5	
Does the system allow the user to create a bank file which can be used for the net pay distributions?			
Payment by PACS?			
What other EFT bank files are currently provided by the system?			
Payment by cheque?			
Can payment be made into more than one bank account if the employee needs to split his/her net pay amount?			

16.17 Payroll: Payment of 3rd Parties

The client needs to automate the payments of the 3rd party payments. This section relates to the way in which the system handles payments to third parties.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Can the system make payments via EFT for 3 rd party payments? If not, would the system be able to interface to a 3 rd party payment system?		5	
3 rd Party bank files must run on the 27 th of a month (for retirement funds, medical aid schemes) on the 30 th / 31 st of a month for garnishee / maintenance orders as well as on 6 th / 7 th of a month (for SARS and other			

Requirement	Vendor Rating	Level of Importance	Vendor Comments
3 rd party payments. Is it possible?			

16.18 Payroll: Salary Calculator

To allow the client to calculate the “what if” scenarios on individual level or groups of employees, the system should allow the client to calculate salary results without running payroll runs. This section relates to the way in which the system handles this requirement where the “salary calculator” assists the client with increases, salary negotiations, new engagement and job offers need to be prepared.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Is functionality in the system available to calculate the salary of an employee without running the payroll to view the results?		5	

16.19 Payroll: Report Scheduler

The client needs to automate the running of major reports after hours and to run the necessary major reports immediately after the final payroll run has been completed. This section relates to the way in which the system handles this requirement of report scheduling.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Does the system allow the user to select when reports can automatically start after a specific activity? E.g. - the pay run is activated and directly after the run is finished, the automatic generation of certain reports - pay slip extracts, payroll reconciliation reports, etc		5	

16.20 Payroll: Time and Attendance System

The client makes use of a time and attendance system. This section relates to the way in which the system handles this requirement where the Payroll must integrate with the Time and Attendance system.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Can the system interface with Time and Attendance systems?		5	
List the names of time and attendance systems which currently interface with your system?		5	

16.21 Payroll: Pay Slip

This section details the questions to be asked about the system approach to handling all payroll component matters.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Can the system generate electronic pay slips?		5	
If so, can the pay slips be distributed via employee self service/the E-mailing system?			
The pay slip needs to be able to provide a breakdown of the expenses being deducted			
Is it possible to create a sample pay slip for a single employee? (This would be done when their employee is completing his benefits modeling).			
Once payroll capturing has been done for an employee, can the system generate a 'dummy' pay slip for the purposes of checking the input? The pay slip needs to be a reflection of his actual pay slip which will be produced once the payroll is accepted / finalised			
Can the payslip printing be selected:			

Requirement	Vendor Rating	Level of Importance	Vendor Comments
<ul style="list-style-type: none"> o Per company as a whole? o Per business unit? o Per division? o Per region? o Per department? o Per employee/individual? 			
If a 3 rd Party is printing the pay slips for the client, can a pay slip export be generated and send to the printing vendor?			
Payslips can be produced automatically			
Payslip layout is flexible			
User can define payslip frequency			
A minimum 6 completed tax years history of pay slips can be stored?			
You can print messages on payslips for the attention of individuals, department or the whole workforce?			

16.22 Payroll: System Roll Over

This section details the way in which the system handles the monthly and year end roll over to the new tax year.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Does the system reset him to the new pay month automatically?		5	
At year end, does the system reset him to the start of the new tax year?			
Does the system support payments in weeks 53, 54 and 56.			
Does the system allow for additional pay runs (13 th run method) in order to finalize the taxable earnings for the tax year? If not, what procedure is used?			

16.23 Payroll: Tax Year End: IRP5

This section details the way in which the system handles the tax regulations in South Africa or foreign countries.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The system should be able to hold the company's SARS reference number detail.		5	
Should be able to produce electronic IT3 (A and B) / IRP5's			
Can the system produce the electronic submission file for the SARS?			
Able to input all tax codes including Nature codes?			
Once the February tax year end run has been completed, and we are capturing for the new tax year, are we able to do backdated capturing for the previous tax year so the IRP5 is automatically adjusted?			
Are any IRP5 tax year end reconciliation reports available?			
Does the system allow users to print reports for example? : <ul style="list-style-type: none"> o Company detail o Linking of cost components to SARS source codes o Cost components not linked o Gross Income reconciliation or variances on 3697/ 3698/3699 SARS codes o Missing Master data detail o Total tax per run number / pay group o Any negative values o Invalid master data (ID numbers/Tax reference numbers) o Final certificate report o Before or after employment date transactions o Etc. 			
Does the system cater for Certificate cancellation?			
Does the system cater for Certificate reprinting?			

16.24 Payroll: UIF

This section details the way in which the system handles the unemployment regulations in South Africa.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Can the system produce the electronic submission file for the Department of Labour?		5	
Are UIF reconciliation reports available?			

12.25 Payroll: Integration: Costing

This section details the way in which the system handles the integration of payroll results to the financial system.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Can the system interface with MS Dynamics Great Plains General Ledger, Project Accounting, Debtors and Creditors modules?		5	
A nominal ledger code can be allocated against each expense code?			
The cost of an employee can then be split over more than one cost centre at a ratio / percentage that you have defined?			
Ability to split the cost of an employee over more than one cost centre automatically based on the number of hours worked / gross pay at each cost centre or business unit?			
Allows for the costing of timesheets during the payroll run?			
Integration with Employee Benefit administration systems?			
Integration with Medical Aid administration systems?			
Integration with CRM systems into fringe benefits of employees taking up “gratis” accommodation in SANParks resorts?			
Integration with Active Directory to manage users and facilitate Single Sign On (SSO)?			

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Integration with an Enterprise Service Bus (ESB) - SUN JCaps?			

16.26 Payroll: Customer Service

This section details the way in which the system handles customer service.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Must allow for dummy runs of forms in order to finalise alignment of stationery with printer?		5	
Offers back up and restore facilities for the data?			
Provide on screen help, on line help or telephone help-line services and additional support documentation?			
Provide update facilities to accommodate legislative and procedural changes?			

16.27 Payroll: National Minimum Wage Validation

The client is bind by the conditions of the BCEA. This section relates to the way in which the system handles this requirement of wage validation.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The national minimum wage validation includes setting the rate of pay for 18 to 21 years of age.		5	
The National minimum wage calculation is based on the annualised hours and actual hours worked.			
Employees must be flagged if they are adolescent for National Minimum			

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Wage.			
Flag if employees are on an approved training scheme for National Minimum Wage.			
The system should provide exception reports if an employee is reaching the National Minimum Wage limit.			
Does the vendor foresee that the system can handle these types of requirements as above?			

16.28 Payroll: Working Time Directive

This section relates to the way in which the system handles this requirement of time.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
You can specify casual workers?		5	
System can keep details of standard daily hours?			
Record all hours on a day by day basis?			
Record details of employees who have additional employment?			
Allow you to enter hours worked on a daily basis?			
You can record shifts?			
The system can record / calculate casual workers' holiday entitlement?			
Calculate night workers average working hours?			
Rolling periods can be defined e.g. 17 weeks?			
Exception reports are available if a person is reaching the Working Time Directive Limits?			
Hold individual employees who have 'opted out' of the 48 hour limit?			

16.29 Payroll: Employers Electronic Communication (EEC)

This section relates to the way in which the system handles electronic communication.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Can the system allow the user to send forms over the Internet?		5	
Ability to send forms by EDI using Value Added Networks, ISDN or X400			
Is it possible to print the monthly EMP201 form and annual EMP501 form with the relevant correct information to enable the client to submit these to Inland Revenue via the electronic gateway (SARS E-Filing)			

17. Payroll Specific Requirements

This section details the questions to be asked about the system approach to handling all payroll requirements.

Vendors must take note of the following keys when completing the questionnaire

Key: Vendor Rating

<i>0</i>	<i>1</i>	<i>2</i>
<i>Not catered at all</i>	<i>Catered in the System</i>	<i>System to be customised</i>

Key: Importance

<i>0</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>
<i>Not required at all</i>					<i>Absolutely critical</i>

17.1 Payroll: Pension / Provident Fund Schemes

2 x Different retirement funds are offered to employees with its own rules and requirements. Employees may contribute to a Pension fund for their own contributions (EE) but the Employer contributions (ER) are paid towards a Provident fund.

This section details the way in which the system handles the pension or provident fund requirements.

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The system must allow for different retirement funds.		5	
The system must allow the user to deduct pension / provident fund contributions before or after tax.			
The system must allow the user to deduct arrear pension / provident fund contributions.			
The employee can belong to multiple schemes (EE as a pension fund member and ER as a provident fund member).			
<p>The system must allow for a contribution on a % of different salary information - e.g.</p> <ul style="list-style-type: none"> ○ Based on RFI - Retirement Fund Income ○ Based on Cost to Company Salary ○ Based on Normal Pay 			
<p>The system must allow for a contribution on a % for:</p> <ul style="list-style-type: none"> ○ Employee contributions (EE) <ul style="list-style-type: none"> • Mandatory 7.5%. ○ Employer contributions (ER) <ul style="list-style-type: none"> • 12 % - depends which fund opted 			
<p>The system must allow for the retirement fund reference numbers:</p> <ul style="list-style-type: none"> ○ For the Pension Fund and ○ For the Provident Fund where the employee belongs to multiple funds. 			
The system must be able to supply Retirement Fund reports in specific formats which will be given to the vendor with further negotiations.			
The system must be able to supply a Retirement Fund interface to the fund Administrators in a specific format (the format will be given to the vendor with further negotiations).			
The system must be able not to change any pension or provident			

Requirement	Vendor Rating	Level of Importance	Vendor Comments
fund contributions of previous pay months if the values should have been less than what was calculated originally. No negative values can be sent through to the schemes.			
Client specific Requirements for this function			
Ability to calculate stakeholder pension contribution in respect of the designated scheme			
Ability to calculate pension deductions in accordance with S392 paragraphs (7) and (8) of the Income and Corporation Taxes Act 1988 for net pay arrangements			
Ability to calculate pension deductions to calculate either as a percentage of gross pay or fixed amount, record and deduct employee's pension contributions and any Advanced Voluntary Contributions (AVC)			
Ability to calculate pension deductions for pension contributions paid under deduction of tax (relief at source)			
Ability to calculate pension deductions to calculate pension contributions to Free Standing Voluntary contributions, Personal Pensions or Group Personal Pensions			
Ability to provide separate records of pension contributions for audit purposes			
Employee contributions is payable to a pension scheme and company contributions to a provident fund scheme.			
Pension deductions are held by tax year and by other periods which allow you to accumulate them over any period			
Pensions can be deducted before or after tax			

17.2 Payroll: Medical Aid Schemes

4 x Different medical schemes are offered to employees with its own rules and requirements. Medical Contributions are based on plan codes, dependant detail, etc.

This section details the way in which the system handles the pension or provident fund requirements.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The system must allow for different medical aid funds.		5	
The system must allow for the import of medical aid contributions via an electronic file.			
The system must be able to calculate the medical aid contributions automatically if all the medical aid information has been captured for the employee and based on: <ul style="list-style-type: none"> o Medical Scheme o Medical Plan o Saving Option 			
The system must allow for a medical aid contribution on a % for: <ul style="list-style-type: none"> o Employee contributions (EE) - 40% o Employer contributions (ER) - 60% 			
The system must allow the user to deduct arrear medical aid contributions.			
The system must be able to supply Medical Aid reports in specific formats for the different medical aid funds which will be given to the vendor with further negotiations.			

17.3 Payroll: Company Loans

The client from time to time provides financial assistance to employees. Loans can be granted differently and as well as the management thereof. There are two types of loans:

- Interest free loans and
- Interest bearing loans

This section details the way in which the system handles the company loans requirements.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The system must allow the client to manage effectively the client's company loans through the system.		5	
Interest Free loans <ul style="list-style-type: none"> ○ The user to record the capital amount ○ Record the date of the loan ○ Interest prime rate % or ○ Interest other rate % ○ Record the repayment amount ○ To have a reference field or comments field for general comments 			
Interest Bearing loans <ul style="list-style-type: none"> ○ The user to record the capital amount ○ Record the date of the loan ○ Record the repayment amount ○ To have a reference field or comments field for general comments 			
The system to carry balances of the loans.			
The system to calculate tax implications (<>R3000).			
The system to allow for the change of loan instalments on employee choice: <ul style="list-style-type: none"> ○ Usually with bonus payments, the employee wants to pay more towards the loan. 			

17.4 Payroll: Bonus

The client allows the employees to structure a bonus within the salary package.

This section details the way in which the system handles the commission requirements.

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The bonus is based on the employees RFI value and the bonus is payable each November of a year.		5	
The bonus is a provision calculated from December to November pay months.			
When the employee receives an increase during the year, the bonus provision is increasing as well.			
The bonus becomes payable on the first working day of December by paying the employees through an interim run procedure.			
The bonus can be paid out immediately when the employee is terminated or when the employee restructures his/her salary package.			
Employees can also choose to make provision for tax on the bonus.			
The tax provision is calculated from March to November pay months.			
The tax provision amount is payable to SARS: <ul style="list-style-type: none"> ○ with the normal monthly PAYE payments, or ○ deducted from the employee as a saving, payable to the employee in November and fully taxed on the bonus amount. 			
The system must allow for a option when the bonus becomes payable: <ul style="list-style-type: none"> ○ November pay month (as currently) ○ Engagement pay month (possible in future) ○ Birth date pay month (possible in future) 			
Does the vendor foresee that the system can handle these types of requirements as above?			

17.5 Payroll: Garnishee / Maintenance Orders

This section details the way in which the system handles the garnishee / maintenance / administration requirements.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The system should cater for statutory deductions like Garnishee - or Maintenance Orders.		5	
The client has more than a 1000 different payees / institutions for which garnishee - / maintenance orders have to be recovered from employees.			
The system must cater for the address details and banking details of the different institutions.			
The client is entitled to recover an admin fee on the amount.			
The system must carry the balance of the garnishee where necessary.			
Can the system pay the institution directly through a bank run facility?			
The system must allow the user to print a deduction schedule per institution quoting employee detail, amounts, references, etc.			
Report to quote as well the Commission and VAT on Commission recovered and VAT numbers.			

17.6 Payroll: Travel Allowance

The client allows the employees to structure a travel allowance within the salary package. This section details the way in which the system handles the travel allowance requirements.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Employees may select to have a portion of their Cost to Company salary paid as a car allowance.		5	
The system should warn the user if the travel allowance is more than 35% of the Cost to Company salary amount.			
The system should tax the employee correctly on the applicable % of the travel allowance amount.			

17.7 Payroll: Group Life

The client pays on behalf the employees a life assurance which forms part of the Cost to Company salary package. This section details the way in which the system handles the group life cover requirements.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The employees are covered by life assurance.		5	
The cost of the life insurance is a % of the RFI or Cost to Company or Normal Pay amounts.			
The cost is seen as ER contributions and will therefore reduced the employee's Cash Salary portion calculated from the CTC amount.			
Employees have no choice but the contributions are mandatory.			

17.8 Payroll: Group Disability Cover

The client pays on behalf the employees a disability assurance which forms part of the Cost to Company salary package. This section details the way in which the system handles the group disability cover requirements.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The employees are covered for disability.		5	
The cost of the life insurance is a % of the RFI or Cost to Company or Normal Pay amounts.			
The cost is seen as ER contributions and will therefore reduced the employee's Cash Salary portion calculated from the CTC amount.			
Employees have no choice but the contributions are mandatory.			

17.9 Payroll: Fringe Benefits (Company Car / Mobile Phones)

Company vehicles or mobile phones are signed / allocated to certain employees. This section details the way in which the system handles the fringe benefit requirements.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Company vehicle details can be maintained.		5	
Company vehicles may be assigned to an employee or held as pool vehicles.			
Multiple vehicles may be assigned to an employee throughout the year.			
Automatic calculation of tax liability of each vehicle and overall.			
Business and personal mileage by employee and vehicle can be recorded.			
Employee contributions to vehicle running costs can be maintained.			
Number of day's vehicle available to an employee can be recorded.			
Application of fuel scale charge can be assigned.			
Private vehicles and the associated taxable benefits on mileage can be handled.			
Mobile Phones may be assigned to an employee.			
Automatic calculation of taxable benefits due on mobile phones.			

17.10 Payroll: Employee Expenses

Employees may claim certain expenses. This section details the way in which the system handles the expense requirements.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Automatic calculation of taxable benefits due on relocation expenses.		5	
Automatic calculation of taxable benefits due on miscellaneous expenses.			

17.11 Payroll: Client's Specific Payroll Requirements

This section details the way in which the system handles specific payroll requirements.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
User can specify plans to administer salaries by geographic location or company.		5	
External salary information (e.g. industry surveys) can be recorded.			
User can view employee's total package.			
Salary changes can be added in batch mode.			
Salary changes can be future dated.			
Salary increments can be entered as percentage changes, absolute increments or final sum.			
Salary increments are entered as proposed prior to approval / authorisation.			
User defined parameters, e.g. grade bands, validate the increments entered.			
Salary reviews can be linked to performance appraisals.			
Salary reviews, merit increases, can be controlled on an employee's anniversary date.			

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Next salary review date can be suggested by the system based on policy.			
Reason codes can be applied for changes to rates.			
Hourly rates are supported.			
Annual rate is supported.			
Pay period rate can be weekly, monthly etc.			
Multiple pay rates per employee in a pay period are allowed.			
Salary tables can be maintained.			
System can check compliance with the salary tables before salary changes.			
System can check compliance with the salary tables after salary changes are authorised.			
Salary tables can be linked to job / position.			
Salary tables can be linked to grade.			
Salary range is supported e.g. minimum, middle, and maximum.			
Salary may be scaled e.g. starting salary, end of probation, standard rate etc.			
Salary may be based on banding.			
One salary grade code could have more than one salary grade / range e.g. same job in different geographic areas.			
Multiple bonus plans per employee.			
Commissions can be supported.			
Profit sharing criteria can be held.			
Non cash incentives can be held.			
Complete salary history by employee is maintained.			
Does the system record gross and calculate gross pay according to IR standards?			
Can record multiple rates of pay per employee?			
Can calculate multiple overtime factors for each rate of pay?			
Multiple cost codes can be assigned to an employee?			
User can define rules to determine cost code allocation?			
Unlimited pay elements, and associated taxation, can be created?			
Each pay element has a standard classification?			

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Each pay element has a processing type?			
Recurring pay elements are subject to date effectively?			
Pay element eligibility can be linked to an employee or a job / position?			
Incentive package rules can be user defined?			
Automatically assign and change employee compensation and benefits?			
User definable monetary tables?			
Gross to net calculations are automated?			
Net to gross calculations are automated?			
Unlimited build up to gross is available?			
User can define own deductions?			
Back pay can be automatically calculated?			
Ability to make, record, deduct and pay Trade Union dues			

18. Leave Management

This section details the questions to be asked about the system approach to handling all leave management requirements.

Vendors must take note of the following keys when completing the questionnaire

Key: Vendor Rating

<i>0</i>	<i>1</i>	<i>2</i>
<i>Not catered at all</i>	<i>Catered in the System</i>	<i>System to be customised</i>

Key: Importance

<i>0</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>
<i>Not required at all</i>					<i>Absolutely critical</i>

18.1 Leave: Leave Type Requirements

The client has different leave types with their own specific rules and requirements. This section details the questions to be asked about the system approach to handling all leave component matters.

The leave rules are in the process to be reviewed and new requirements may be applicable in the near future.

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Requirement	Vendor Rating	Level of Importance	Vendor Comments
You can set-up your company's different leave type rules with the relevant payment requirements for them?		5	
<p>Can the system cater for different leave types?</p> <ul style="list-style-type: none"> ○ Annual Leave ○ Sick Leave ○ Unpaid Leave ○ Maternity Leave ○ Family Responsibility Leave ○ Paternity Leave ○ Study Leave ○ Special Leave ○ Shop Steward Leave ○ Long Service Leave 			
<p>Annual leave</p> <ul style="list-style-type: none"> ○ Leave cycle starts on engagement date. ○ 5 / 6 day workers with different annual accruals? ○ No negative leave is allowed - the days in "negative" become automatically unpaid leave. 			
<p>Sick leave</p> <ul style="list-style-type: none"> ○ 36 Days - 3 year sick cycle ○ 12 months service - 1 day per 26 days worked ○ After 12 months - rest of entitlements 			
<p>Injury on Duty (IOD) Sick</p> <ul style="list-style-type: none"> ○ The system should calculate Injury on Duty (IOD) sick pay when the sick leave type has been chosen with the capturing of absence so that the client can claim the amount from the Compensation Commissioner. 			
<p>Unpaid leave</p> <ul style="list-style-type: none"> ○ Employees may apply for unpaid leave. ○ Pay to be reduced by the hourly or daily rate. 			

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Long Service leave <ul style="list-style-type: none"> ○ After each 10year service intervals, additional days are allocated. 			
Study Leave <ul style="list-style-type: none"> ○ The client managed this leave type in-house. <ul style="list-style-type: none"> • Day prior to examination date for revision purposes and the examination date are used for study leave. ○ The system should allow for the period taken as study leave. ○ No balance is involved. 			
Special Leave <ul style="list-style-type: none"> ○ 10 Days per leave cycle ○ On managerial discretion 			
Shop Steward Leave <ul style="list-style-type: none"> ○ 3 Days per leave cycle 			
Maternity Leave <ul style="list-style-type: none"> ○ 6 months for remuneration purposes. <ul style="list-style-type: none"> • First 6 months = full pay • In excess of 6 months = unpaid leave 			
Family Responsibility Leave <ul style="list-style-type: none"> ○ 10 days per leave cycle ○ Only to be accrued after 3 months service 			
Paternity Leave <ul style="list-style-type: none"> ○ 10 days per leave cycle ○ Only to be accrued after 3 months service 			

18.2 Leave: Import of Data Facility

The client receives bulk leave input documentation from business units, departments, regions and requires a facility to import this information into the system without manual capturing actions. This section details the questions to be asked about the system approach to handling of import data.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Does the system have a facility available to import leave information into the system for : <ul style="list-style-type: none"> ○ Leave Balances ○ Leave Taken Dates (From / To Dates) 		5	

18.3 Leave: Link to Payroll

This section details the way in which the system handles the linking of leave to payroll requirements.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The client would like to capture certain leave information (e.g. unpaid leave or leave payout in the leave module). Does the system allow the pulling of leave data through to the salary detail tables automatically?		5	
One point of capturing in Leave.			
Payroll to pay correctly for : <ul style="list-style-type: none"> ○ Unpaid Leave ○ Resignations - Leave pay ○ Maternity Leave 			
Payslip to quote all unpaid leave (minus amount and days) correctly.			

18.4 Leave: Employee Termination (Procedure)

When employees are terminated, the leave balances must be come automatically “Nil”. This section details the way in which the system handles the termination of employee with the leave procedures.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
<p>Can the system automatically calculate the values when employees are terminated?</p> <ul style="list-style-type: none"> ○ Pay the employee the leave balance value in the Payroll module of the system? ○ Make automatically the leave balance zero in the leave module? ○ Generate an automatic record in the leave module "Leave Payout" with the correct total leave balance days as the quantity days 		5	

18.5 Leave: Fast Entry Screen

The client receives bulk leave forms from employees and requires a fast entry screen for bulk capturing of the same information. This section details the way in which the system handles the fast entry screen procedures.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The system should cater for bulk capturing of leave taken - fast entry		5	
The system should verify / check the data capture (employee number, for overlapping dates, is the "from date" not after the "to date" field, etc.) before saving the data.			

18.6 Leave: Public Holidays

Public Holidays are used in the leave rules. This section details the way in which the system handles the holiday procedures.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The system must cater for all the different public holidays in year calendar for South Africa and foreign countries.		5	
Where the leave rules exclude public holidays in the taken total, the system should calculate the totals correctly.			

18.7 Leave: Leave Management Reports

This section details the way in which the system handles the leave reports.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
<p>Various leave management reports on all the leave types are required.</p> <ul style="list-style-type: none"> ○ Leave Taken reports ○ Full leave management report by Individual Employee (full history) ○ Leave / Sick Balances ○ Monday / Friday absence report ○ Leave Liability (provision) report ○ Graph reports? 		5	

18.8 Leave: Client Specific Absence Requirements

This section details the way in which the system handles the absence procedures.

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Requirement	Vendor Rating	Level of Importance	Vendor Comments
Absence can be viewed on a calendarised display.		5	
Ability to track absence patterns.			
Absence details can be overlaid over employee's working patterns			
User can define absence types e.g. accident at work, long term illness etc.			
Absence can be costed in terms of earnings / benefits paid to absent employee.			
Absence can be costed in terms of earnings / benefits paid to replacement staff.			
Absence can be costed in terms of temporary employment costs			
System will automatically note request for a doctor's certificate beyond company policy.			
System informs relevant personnel if key person is absent. <ul style="list-style-type: none"> o Does the self -service inform the Manager if the employee applies for leave? o Employees may apply for leave 2 months in advance - does the system remind the Manager a day or two prior to the leave taken starts? 			
System can advise when an employee moves from paid to unpaid leave.			
System can record projected start and end dates.			
System can record actual start and end date.			
System can record reason for leave.			
System can record if leave is paid, unpaid, or partially paid.			
System can record the amount of leave accrued.			
System can record leave entitlements.			
System can record leave taken.			
System can calculate monetary value of leave taken.			
System can calculate carry over value of leave not taken.			
System can consolidate monetary value of all leave carried forward.			
Severance procedures / rules can be maintained.			
Severance calculations are table driven.			
Statutory severance can be calculated.			
Statutory notice can be calculated.			

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Initiating manager can be recorded.			
Manager responsible for approving severance can be recorded.			
Reason for severance / termination can be recorded.			
Full audit trail of severance / termination process.			
Ability to record if special leave has been authorised and by whom.			

19 Reports

This section details the questions to be asked about the system approach to handling all leave management requirements.

Vendors must take note of the following keys when completing the questionnaire

Key: Vendor Rating

<i>0</i>	<i>1</i>	<i>2</i>
<i>Not catered at all</i>	<i>Catered in the System</i>	<i>System to be customised</i>

Key: Importance

<i>0</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>
<i>Not required at all</i>					<i>Absolutely critical</i>

19.1 Reports

The client needs various reports in specific formats. This section details the way in which the system handles the system reports.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
The system must provide the client with a flexible report generator which can define and produce reports on both a		5	

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
regular and an ad-hoc basis.			
Such facilities should be accessible to users, under access control restrictions and guidelines.			
<p>The vendor to indicate whether multiple reports are requested at the same time - will :</p> <ul style="list-style-type: none"> ○ The system affects the other users' speed negatively? 			
What are the Report Writer specifications?			
What is the ability to customise all standard reports to the client's needs?			
<p>Can Native reports be exported to:</p> <ul style="list-style-type: none"> ○ Printouts (hard copies)? ○ CSV? ○ HTML? ○ Excel? ○ Text? ○ Word? ○ XML? 			
The report generator should provide access to master and payroll detail records through interactive inquiry.			
<p>Does a facility exist to sort data in user-specified orders?</p> <ul style="list-style-type: none"> ○ Ascending ○ Descending ○ Top down ○ Bottom up ○ Bottom down ○ Etc. 			
<p>Process complex selection criteria utilising operators</p> <ul style="list-style-type: none"> ○ Equal ○ Not equal 			

HR System Implementation RFB - SANParks

Requirement	Vendor Rating	Level of Importance	Vendor Comments
<ul style="list-style-type: none"> o Greater than o “What if” statements o “AND”, “OR” statements o Etc. 			
The system should allow the user: <ul style="list-style-type: none"> o To view the report on screen before the print selection. o Performing rounding of amount fields? o Route output to prints, screen or disk? 			
Can the reports be displayed graphically?			
Client’s specific report requirements			
User can sort on any field?			
Earnings summary history by employee can be maintained			
Employee deductions by category			
User can browse all payslips held on the system for each employee			
Overtime figures can be extracted for any user defined period by hours or monetary value			
Provides necessary figures to undertake periodic legislative reporting.			

is section details the questions to be asked about the system approach to handling all integration requirements.

Vendors must take note of the following keys when completing the questionnaire

Key: Vendor Rating

0	1	2
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<i>Not catered at all</i>	<i>Catered in the System</i>	<i>System to be customised</i>
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Key: Importance

0	1	2	3	4	5
<i>Not required at all</i>					<i>Absolutely critical</i>

This section details any general questions relating to interface requirements.

Requirement	Vendor Rating	Level of Importance	Vendor Comments
Can the system interface with 3 rd Party systems?		5	
Must interface to the following systems: <ul style="list-style-type: none"> • General Ledger - the client is using "Great Plans" as a financial system. • Reservations system • Time and Attendance system 			
Ability to accept uploads in a flat file format?			

19.2 System/Technology Requirements (continued)

Requirement	Rating	Level of Importance	Comments
<i>Security</i>			
Must support individual user logons and SSO		5	
Access Control should be granular (field level)		4	
Field level Audit trail		5	
The system must allow for security to be defined relative to the groupings which exist within the system		5	
Access Control must be able to support employee self service		5	
<i>Interfaces</i>			
Integrate with an SMS Mobile Gateway		1	
Ability to accept uploads in a flat file format		5	
<i>Document Management</i>			
The management of document creation.		2	
The management of document enhancements and change control.		2	
Managing and distribution of inbound and outbound documents.		2	
Managing document sign-off/ approval.		2	
<i>General</i>			
Imaging facilities allowing users to store images of important documents and photographs integrated with MS Share Point.		1	
Easy to use utilities including back-up and restore to ensure data integrity, roll back and roll forward.		1	
Other tools such as internal email and on screen calculations.		1	
Elimination of duplication and recapturing of data.		5	

HR System Implementation RFB - SANParks

Requirement	Rating	Level of Importance	Comments
Emphasis is placed on complete integration between the various modules. This implies that all the data is logically kept in one central repository with a single source of entry for each data field. A key requirement is that all data has one point of entry, thus eliminating the currently undesirable practice of duplication of effort.		5	
Must have "easy to use" and intuitive menu navigation.		5	
Windows based with GUI navigation.		5	
Have good overall systems documentation.		5	
Allow for modular implementation		4	
<i>Audit requirements</i>			
Any changes to the data in the system is electronically and automatically recorded and must have the option to disable parts, not everything, if need be.		5	
The system must contain a full audit trail of entries and amendments together with the ability to drill down to the original entry / amendment screen		5	
<i>Electronic mail</i>			
Must integrate with systems Exchange		5	
Remind users to run reports		5	
<i>Help</i>			
On-line easy to use help		5	
Available throughout the system.		5	
Customisable by the user.		5	
<i>Reporting</i>			
The system database is ODBC compliant, enabling any 3 rd party report writing tool is able to extract the information in SANParks's required format.		5	
The system uses a recognised industry relational database; i.e. not just flat files mapped to a database.		5	
Printer functionality:		5	
<ul style="list-style-type: none"> • Output to screen or printer 			
<ul style="list-style-type: none"> • Any laser printer 			
<ul style="list-style-type: none"> • All DeskJet / inject printers 			
Outputs to file:		5	
<ul style="list-style-type: none"> • MS Word 			
<ul style="list-style-type: none"> • MS Excel 			

HR System Implementation RFB - SANParks

Requirement	Rating	Level of Importance	Comments
<ul style="list-style-type: none"> • PDF 			
<ul style="list-style-type: none"> • XML 			
<ul style="list-style-type: none"> • Flat / Fixed length files 			
<ul style="list-style-type: none"> • Letter generation by application 			
<ul style="list-style-type: none"> • Label generation by application 			

HR System Implementation RFB - SANParks

