

YOUR TRANSFORMATION STARTS HERE

EVOTIX ASSURE PEOPLE AND
TRAINING MANAGEMENT
SERVICE DEFINITION

EVOTIX

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1. OVERVIEW OF EVOTIX ASSURE PEOPLE AND TRAINING MANAGEMENT

The Evotix Assure People and Training Management helps you reduce the risk of employees and contractors undertaking activities that they are not trained, qualified or competent to complete.

The module includes a training matrix report to easily identify employees or contractors who are compliant, due for renewal or who are noncompliant. This aids future planning of training, compliance management and individual appraisal conversations.

Training needs analysis templates containing job-specific courses or training elements can be created to support a consistent approach and reduce administration. You can allocate completion and renewal dates to each training course. Email reminders and escalation alerts help you to quickly identify and resolve any potential compliance risks.

The People and Training Management module can be integrated with other HR and external e-Learning systems.

Benefit from a complete view of training records, employment history, training needs analysis and compliance data such as health surveillance and driving licence details.

Insights+, Assure's business intelligence tool, translates data into insights to help you identify your competent users (by role, qualification, location, team, manager and compliance exposure whilst also supporting smarter EHS training decisions.)

Why Assure People and Training?

- Helps minimize the risk of incidents due to training failures.
- Supports effective planning by identifying skills gaps.
- Demonstrates compliance and good training management to stakeholders, legal bodies, supply chain and customers.
- Provides evidence for employee training budgets.
- Reduces administration time

Features

- Maintain up-to-date employee and contractor information.
- Show individuals' current training RAG status.
- Record health surveillance information.
- Create a training matrix to identify training needs.
- Monitor training costs.
- Generate training actions and issue reminders.

- Store evidence of training in individual employee records.
- Interactive dashboards provide KPI data

What's included?

- Register – Record information on employees/ contractors to provide an overview of their EHS records and performance.
- Employment History – List dates of employment for each employee.
- Training Records – Record ad-hoc training and upload certificates.
- Training Needs Analysis (TNA) – Course / component Create and build a course library.
- Training Needs Analysis (TNA) – Create a TNA for each employee based on job specific requirements.
- TNA Templates – Create job specific templates listing all relevant training courses.
- Health Surveillance – Capture all health monitoring for employees/contractors.
- Driving Licence Details – Record driver licence details for employees/contractors.

In common with other Assure modules, users benefit from the potential to integrate People and Training Management with other modules to create a complete health and safety management solution.

With our understanding of safety, not just technology, and our highly adaptable solution to meet your specific needs, Evotix is the long-term partner for your journey. We share your passion for improvement.

As an Evotix customer, you will enjoy a true SAAS solution that is highly configurable, scalable, future proof and provides an intuitive user experience. We release updates (fixes, new functionality etc.) to the platform every 2 weeks.

2. SECURITY

Evotix provides the highest levels of security, availability, responsive support and scalability, in line with the NCSC cloud security principles.

We take all security threats seriously and through risk assessment and implementation of appropriate controls, we work to protect all data. The security of sensitive company data is central to our approach and for this purpose we use Amazon Web Services (AWS) where cloud security is the highest priority. Best practice is used in the design, development and implementation of our software solutions to create the product.

The AWS infrastructure puts strong safeguards in place to protect customer data and privacy. All data is stored in highly secure AWS data centres which meet ISO 27001, Evotix is also certified to ISO 27001.

3. ON-BOARDING PROCESS

We understand that buying software can be the easy part – value comes through getting that software adopted by your organisation. Assure is easy to use and highly configurable so that you can ensure a complete and comfortable fit with your technical, process and information needs. Our on-boarding process builds on the understanding that we have gained during our previous discussions of what you are trying to achieve so that we can work together to configure our software to provide the best possible fit.

We know from experience that it is difficult to specify every detail of the solution up front – some options and opportunities only get discovered as we begin to work through the detail and you use the software. That is why we treat implementation as an iterative process in which we can configure and re-configure the solution until we are both happy with the result.

The first stage is a kick off call to set the scene for the project, and confirm the who, what, when and why of the implementation.

Next, we will provide a high-level orientation of Assure, and then we will undertake a series of configuration workshops in which we look at your detailed requirements and build your Assure solution. We will work together to make configuration changes, at the same time training you in the configuration tools, until we are happy that the solution is right. At the end of this stage you will approve the system for rollout and it will go live.

In the third stage we will carry out end user and administrator training and may make further small adjustments if required.

In our experience, this process typically takes between 10 weeks and 5–6 months – the pace is typically set by the training, communications and roll-out processes within your organisation. If customers play an active part in the configuration of the solution, this speeds up the delivery of the project and helps to ensure the system is well supported post-implementation. We will assign a Evotix Customer Implementation Consultant who will work with your project manager throughout, supported as needed by technical experts.

4. SERVICE MANAGEMENT DETAILS

Working for our customers' success lies at the heart of our principles at Evotix. We are pleased to be able to provide customers with a dedicated Squad, made up of a Customer Implementation Consultant, a Solutions Consultant, Customer Success Manager and a Technical Support Team member, each responsible for an aspect of our

relationship with you. Whilst these are important individually, the real strength lies in what they can achieve collectively.

Your Customer Success Manager will be introduced at the Implementation kick-off and will support the handover to Technical Support once you go live. They will continue working in partnership with you through the life of your journey with Evotix, to ensure the system and services continue to meet your needs as they evolve. You can rely on your Customer Success Manager to leverage the expertise in your Squad to resolve any queries you might have and help you to get the most out of Assure and the wider Evotix team.

The Assure solution has developed over a period of 20 years, guided by our dialogue with experts across our customer base and beyond. We constantly update our solution to meet latest regulations, add new features and take advantage of useful changes in technology. You will automatically benefit from these improvements via your hosted solution. You will be notified on upcoming updates and your Customer Success Manager can go through in more detail, as well as outlining the product roadmap to you when desired.

You will become part of the Evotix user community, including our User Group and access to customer-only social media discussion forums, including one for proposing and voting on product improvements. The User Group is a friendly network for information and experience sharing, problem solving and thought leadership that meets at least once a year in a central location.

5. SERVICE CONSTRAINTS

For full details, please refer to the included Terms and Conditions.

Following satisfactorily completion of the implementation and configuration, Evotix will use reasonable commercial endeavours to provide average availability of at least 99.9% over any 30-day period. Availability does not include planned maintenance events (which are scheduled outside of using working hours), customer-caused or third party-caused outages or disruptions, or outages or disruptions attributable in whole or in part to force majeure events within the meaning of clause 16 in the included Terms and Conditions.

6. SERVICE LEVELS / CUSTOMER SUPPORT

Our customers prize us for our expert and friendly support both at initial implementation and on an ongoing basis. 95% of our customers renew every year. We have a proven implementation approach that ensures that our solutions support your processes and we work in an honest and straightforward style.

We operate a 99.9% uptime SLA.

Evotix Customer Support Process

All cases, issues, or requests for change are, in the first instance, reported to the Help Desk as the central point of contact. The Help Desk can be contacted by the online ticketing system, Hornbill, Monday to Friday 8.30am–5.30pm. Tickets are recorded and monitored in our case management system which ties the request to your customer account to provide a complete history.

The stages of case management are:

1/2. Request and Classification

All ticket requests to the Help Desk are logged in the case management system. When you contact Help Desk, your case is raised as a Request, Problem or Question.

3/4. Investigation and Escalation

An answer will be provided immediately if a solution is known, or a question can be dealt with. If the Help Desk is unable to resolve the case immediately, it will be investigated and escalated to the appropriate Support / Product team member.

5/6. Resolution and Close

Where requests are resolved without escalation, the customer will be given resolution details via Help Desk and after approval the case closed.

Where the case has been escalated, resolution details will continue to be maintained by the Help Desk. The customer will be informed of updates regularly until resolution.

7. FINANCIAL RECOMPENSE MODEL

Please refer to the included Terms and Conditions.

8. TRAINING

Assure has been designed with the user in mind, combining an intuitive consumer style interface with a corporate strength backbone. As a result, it meets business requirements while being straightforward and intuitive to use – not just by experts but by your organisation at large.

We provide users with different training delivery options: our most popular training delivery is online via webinar sessions, specifically for your organisation, and will be tailored for your solution and audience. These can be recorded so you can revisit and reuse them. We also offer interactive video tutorials which can be reused. If required, onsite training can be delivered at an additional cost.

Although influenced by the number of, and the level to which, users are to be trained, the number of training days required is always at your discretion. We will discuss with you a suitable number of days and which delivery method is best suited to your individual requirements.

Onsite training at either your site or our offices is priced from £950+VAT per day plus travel expenses. Depending on requirement, it may be possible to split a full day between two groups, morning and afternoon.

Online training via webinar is priced from £100+VAT per hour.

All licensed users of Assure have access to our Knowledge Base, which contains a variety of help videos and articles.

9. ORDERING AND INVOICING PROCESS

Assure Health & Safety Management Solution modules are purchased directly from Evotix. You can reach our sales department by calling 0300 303 3657 or by emailing gcloud@evotix.com. Alternatively, visit www.evotix.com/contactus and complete the contact form. We will discuss your requirements and then tailor a quotation based on your needs following an online and/or onsite demonstration of the Assure system.

10. CONTRACT TERMINATION

Please refer to the included Terms and Conditions

11. DATA RESTORATION / SERVICE MIGRATION

Evotix will assist with data migration. We have various tools that allow the import and CSV files and/or live linkage to other systems via APIs. You can either purchase and use data import tools directly or ask us to perform the migration for you. We can also provide various data cleansing options. There will normally be an additional fee for these services depending on the complexity of what is required.

12. CUSTOMER RESPONSIBILITIES

Please refer to the included Terms and Conditions for detailed customer responsibilities.

One specific requirement to highlight is that strong implementation is critical to the successful adoption of our solution and customers have a vital role to play in this. For that reason, during the kick off call we confirm the following:

- Clarity about what you want to achieve and the success criteria
- A customer project manager who is committed to the success of the project, has sufficient capacity to fulfil their role and will act as a focus point for communications
- Identification and involvement of those stakeholders whose support is critical to the success of the implementation, such as system expert administrators and decision makers.
- Involvement of (a selection of) your users so that they are ready for change, have made sure that the system works in practice, and can act as advocates
- Communication/engagement with the various groups who will use the system

13. DETAILS OF ANY TRIAL SERVICE AVAILABLE

Evotix can provide a trial if required. We also offer comprehensive, tailored demonstrations with both our commercial team of industry experts and, where necessary, our technical sales staff or development team.

These demonstrations can be facilitated online or on-site at either your offices or our offices in Manchester and East Kilbride, Glasgow. They provide an ideal opportunity to discuss your requirements and for Evotix to demonstrate how Assure meets them. If we cannot meet your needs, we will tell you at the earliest opportunity. This is also an ideal opportunity to have your initial questions answered.

If Evotix is your preferred solution we can make arrangements for a limited time login to a demonstration version of Assure.

Should you require a demonstration of Assure, please [contact us](#).

OUR PURPOSE

The rate of workplace accidents is too high. Behind every statistic is a name and a family. This is NOT ok.

We believe acceptance of the status quo is unacceptable. So, we're on a mission to help people and their organizations create safer, smarter futures.

We harness the latest technologies to give people intuitive, human tools that address their most pressing EHS and wellbeing challenges.

We extend our expertise to organisations seeking to stay ahead of the curve and make a positive difference to their people, and the world around them. We continuously embrace new ideas and develop dynamic technology-driven solutions that are built for a rapidly changing world.

We are Evotix, the change makers that give people the confidence to transform.

Evotix – your transformation starts here.