



Single-solution HR & Payroll software

XCD HR and Payroll Solution

Service Definition Document

# Contents

|                                            |    |
|--------------------------------------------|----|
| What the service is: XCD at a Glance ..... | 3  |
| The Salesforce Platform .....              | 4  |
| Solution Overview .....                    | 5  |
| Core People.....                           | 6  |
| Payroll & Reward.....                      | 11 |
| Timesheets & Work Cycles.....              | 17 |
| Appreciation.....                          | 18 |
| Overtime & Expenses .....                  | 19 |
| Data Backup and Restore .....              | 20 |
| Continuity and Recovery .....              | 21 |
| Data Backup and Recovery .....             | 21 |
| Ordering & Invoicing.....                  | 22 |
| XCD Community .....                        | 22 |
| XCD Development Roadmap .....              | 23 |
| Onboarding & Offboarding.....              | 25 |
| Why XCD? .....                             | 30 |
| Contact Us.....                            | 30 |

## What the service is: XCD at a Glance

XCD is a comprehensive and powerful cloud Employee Relationship Management tool that enhances employee experience, operational efficiency and data-driven HR & Payroll.

XCD's core features include everything Public Sector HR teams need to transform the way they work, including:

- Manager and employee self-service
- Real-time reporting
- Automated workflows
- Absence and leave management
- Dynamic calendars
- Heightened security and data access
- Employee data and documents
- Customised reports, dashboards and analytics
- An easy-to-use Mobile App

XCD's modular design allows for complex functionality to be enabled when required, such as:

- HR
- Payroll
- Pensions
- Reward Management
- Recruitment and Onboarding
- Performance Management
- Learning and Development
- Skills
- Timesheets
- Appreciation
- Overtime & Expenses

XCD is built on the Salesforce Platform, which means our customers have access to the extensive Salesforce ecosystem of integrated platform tools and expertise. XCD also supports a range of further integrations including with data analytics platforms such as Microsoft Power BI.

Salesforce users can find innovative solutions to virtually any challenge and implement integrated tool with consistent security, access, data, reporting and user experience.

"XCD has proved to be a major step forward for everyone in Eastleigh Borough Council."

Jim Nicholson, Eastleigh Borough Council

# The Salesforce Platform

Underpinning the XCD solution is the Salesforce Lightning Platform. The platform provides all the infrastructure and tools required to deliver a fully rounded XCD solution and allows us to leverage the significant investment made by Salesforce into this eco-system.

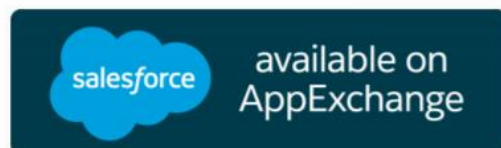
Briefly, the Salesforce Lightning platform provides:

- All required infrastructure fully managed to deliver cloud solutions
- Full security, penetration and threat detection capabilities
- Performance, load balancing and tenancy
- In-country data residence
- Leading-edge development tools including AI (Einstein)
- Full, role-based security
- Email and document management, storage and generation
- Full native Business Intelligence and analytics
- End user management of custom fields, objects, screens, workflows, processes, formulas to build and own configured end solutions
- Multi-billion-dollar investment into infrastructure, tools and acquisitions (for example Heroku and Mulesoft)
- Application ecosystem delivered through a thriving ISV (independent software vendor) network on the AppExchange

## Hosting

Based on Salesforce, our platform is inherently designed with on-demand availability 24/7. Except for (minimal) planned downtime, for which Salesforce gives you prior notice, and force majeure events, Salesforce's hosting provides excellent availability (historically 99.9%). Live and historical statistics on Salesforce system performance are publicly shared on the Salesforce Trust Site.

To maximise availability, the service is delivered using a world-class data centre infrastructure in the UK consisting of a primary production data centre and a full capacity secondary data centre for hosting the service provided to customers. The infrastructure utilises carrier-class components designed to support millions of users. Extensive use of high availability servers and network technologies, and a carrier-neutral network strategy, help to minimise the risk of single points of failure. This also provides a highly resilient environment with maximum uptime and performance.



## Solution Overview

If you're looking to transform the way your HR and Payroll teams work, minimise time spent on administration and concentrate on building valuable relationships with your employees, ultimately reducing costs and increasing engagement, XCD can help you achieve this.

Starting with Core People and selecting additional modules as and when you need them means you can build your perfect solution incrementally and at a pace to suit your timescale and budget.

### Looking for great benefits and ROI?

- Customers report that XCD automation saves 1000's of hours per year
- 5.5 days per month can be saved on reporting
- Over a week per month on Payroll processing
- Global HR Dashboard allows HR to provide more strategic support to the organisation
- Manage complex and different contract terms and working hours for all employees as required
- HR & Payroll run from the same database, eliminating the need for data transfer
- Update personal data and manage approvals anywhere, anytime using the XCD Mobile App

"I've rolled-out a variety of solutions during my career and I can honestly say XCD is by far the best. It's the most customer focused platform I've ever worked with; extremely simple and user friendly – I love it."

Head of HR, Enstar

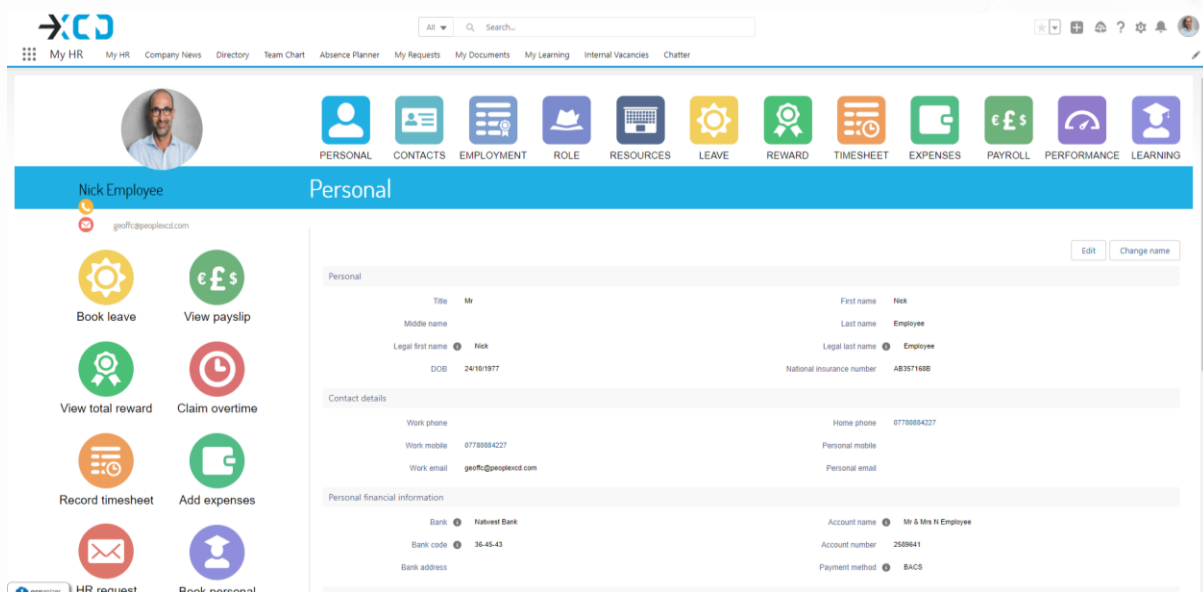
# Core People

## Organisation Post and Establishment Models

XCD has a post and establishment model, commonly used across the Public Sector, which supports multiple terms and conditions. Employees are mapped into posts which contains all the details associated with their role (e.g. reporting manager, location, working hours, terms & conditions, pay spine, grade etc).

The post and establishment models allow for:

- Multiple terms and conditions
- Multiple job roles
- Split post cost allocations
- Flexible work cycles
- Pay spines and grades
- Post management (filled, vacant, on-hold, archived)
- FTE reporting and resource planning



## Self Service

XCD's employee self-service system allows organisations to dramatically speed up people processes and decreases the administrative burden on HR teams.

- Employee and manager self-service with little or no input from Human Resources
- Intuitive design for ease of use and an enhanced user experience
- Manage records anywhere, anytime with the XCD mobile app
- Reduce time spent chasing incomplete records

- Improve onboarding experience by allowing new employees to access and update their personal data prior to joining

## **XCD Mobile App**

The XCD mobile app provides end users with global anytime access to a suite of core self-serve functions.

- Check holiday entitlement and book leave
- Check payslip
- Search colleagues and contact details
- Easily photograph and upload expenses receipts
- Submit and approve expense claims
- Built on the innovative and robust

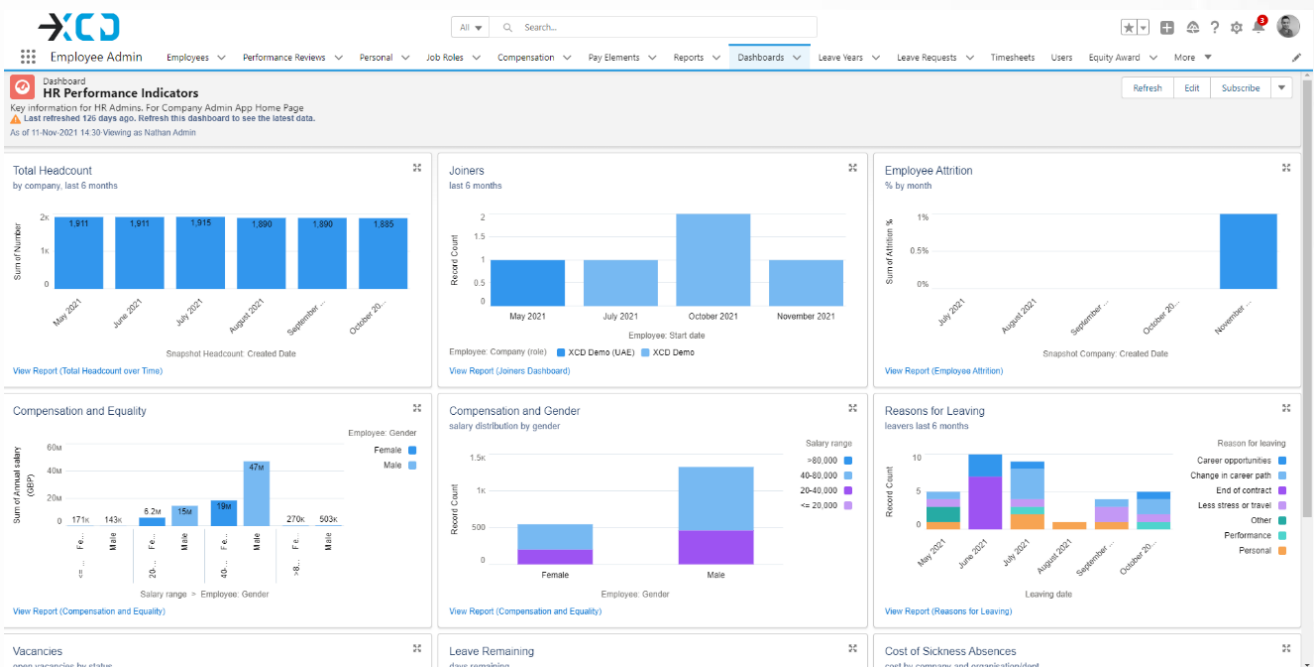
The XCD Mobile App is built on the Salesforce Mobile App.



## Real-time Reporting

With all your data in one place providing one central source of truth, XCD allows HR to deliver real-time, accurate reporting at the click of a button:

- Accurate reporting anywhere, anytime and on any scale
- Circa. 200 human resources reports and 150 payroll reports as standard
- Personalised Executive Reports and Dashboards give instant one-click access to top-level human resources insight
- GDPR reporting facilities – control who sees what and deletion management
- Accurately report on Gender Pay Gap and benchmark against similar organisations
- Diversity and Inclusion reporting provides vital insight into organisational D&I
- Access to Salesforce's next generation AI through Einstein Analytics and Einstein Prediction Builder



## Automated Workflows

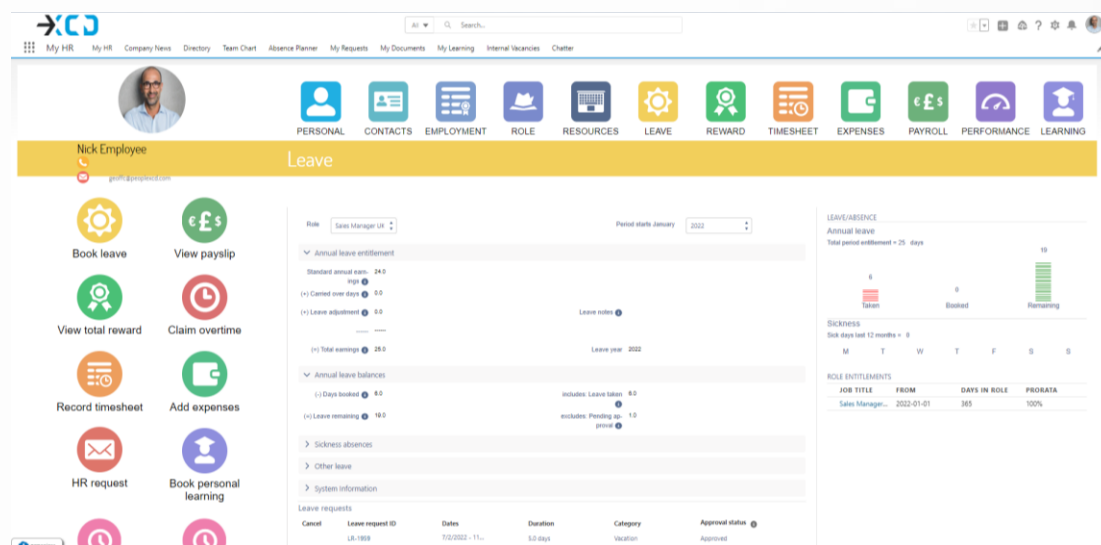
Reduce admin tasks with automated workflows, which simplify processes, reduce errors and increase efficiency, such as:

- Quick start employee onboarding
- Automated reminders to alert employees and managers on overdue tasks and key dates
- Fully automated contract termination for those leaving the organisation

## Absence and Leave

Easy to manage leave and absence. Self-service removes the burden from human resources and enables fast reporting and trend analysis.

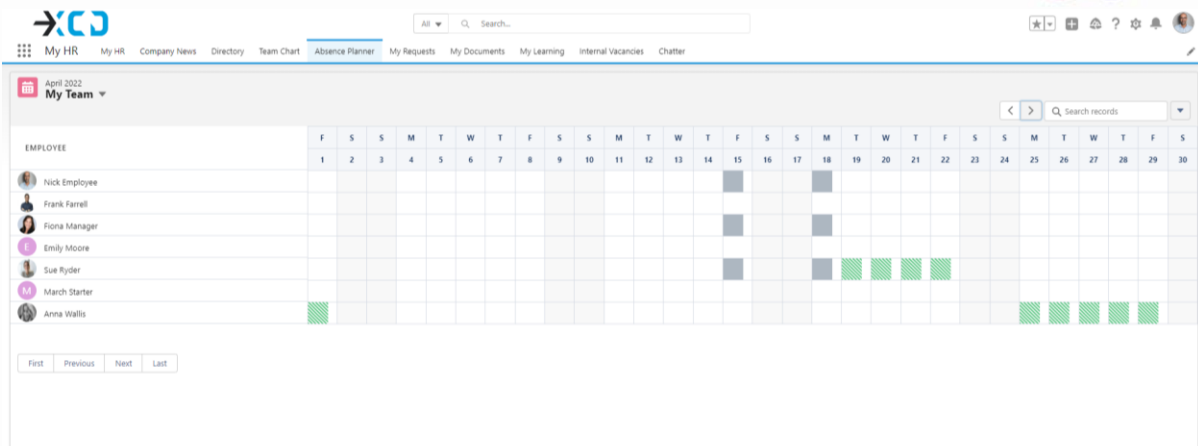
- Leave rules match your organisational requirements - regardless of how many countries or organisations are involved
- Leave can be set to track days or hours, or a combination of both
- Set up triggers and alerts to identify trends, or use the built-in Bradford Score
- Gain a snapshot or detailed view of all leave and absence by organisation, team or individual
- Automate leave calculations for multi-job role employees
- All leave calculated automatically, saving thousands of HR hours per year



## Absence Planner

Take complete control of your time using XCD's team and personal absence planner, which provide an overview of everything you, your managers and your employees need to know.

- Intuitive user experience. Users to see the information they need in the simplest format
- Integrates seamlessly with Outlook and Google Calendars
- Tailored calendar views, colour coordinated to highlight absence, out of office and more
- Highlight regional public holidays and bank holidays



## Data Access & Security

XCD is built on Salesforce, one of the most trusted and secure cloud platforms in the world.

- Tailored views for each set of users - confidential data stays confidential
- System audit logs track administrator actions
- Sharing audit provides check and control to ensure data sharing is in line with GDPR policy

## GDPR

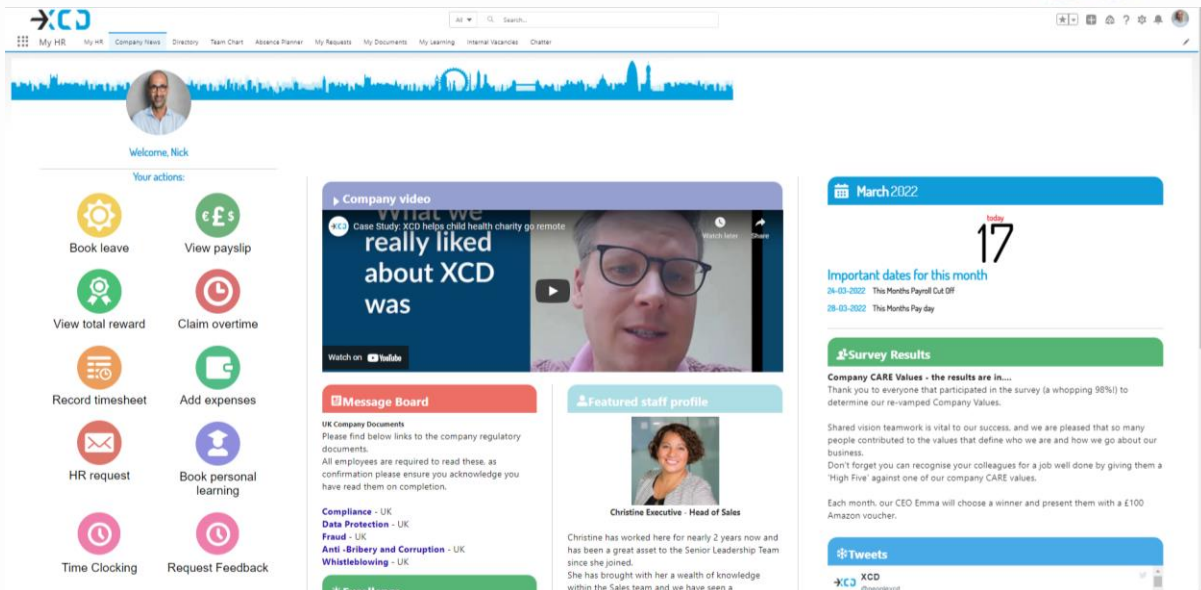
XCD supports your GDPR compliance in several ways.

- Automatically obtain data processing consent from current and prospective employees where required
- Report templates notify HR staff of records that should be deleted under GDPR based on your data retention policies
- We also offer data deletion support as a premium service

## Company Dashboard

One location for important news, announcements, updates and internal communications.

- Message board
- News and announcements
- Featured staff profile(s)
- Job vacancies
- Social Media activity
- Calendar of important dates
- Documents, file and policy acknowledgements



## Payroll & Reward

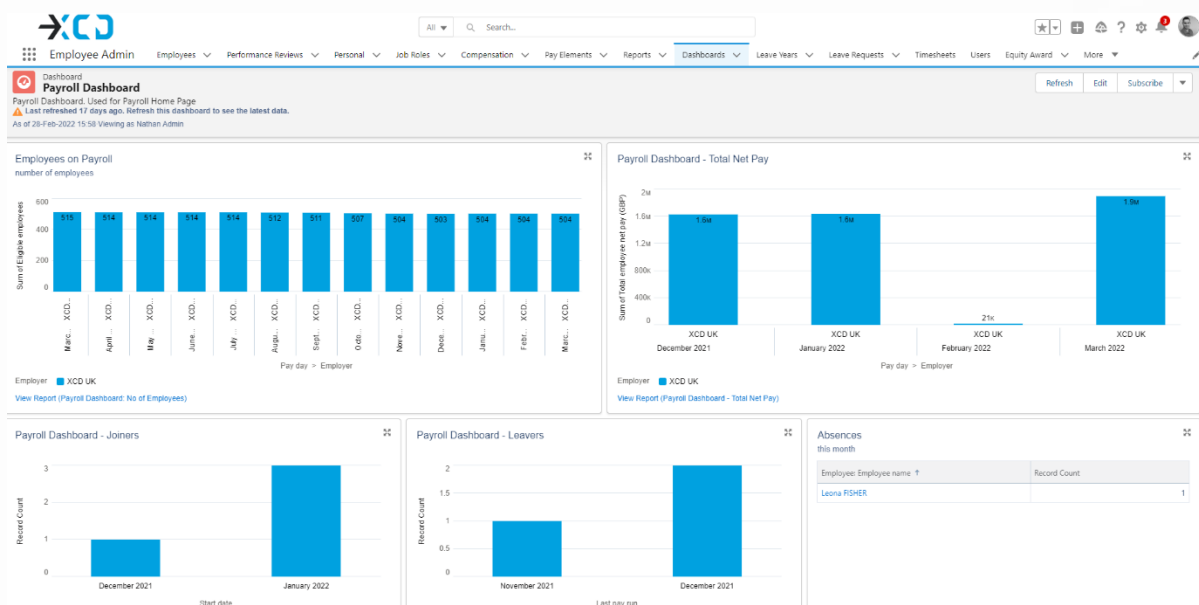
XCD HR & Payroll runs from a single database, no combination, no integration, it is a single application. This means no data transfer between HR & Payroll, no information bottlenecks. Processing is simpler, faster and more accurate.

HMRC compliant, XCD can handle multiple payrolls, flexible payroll periods, RTI submissions, all statutory calculations, student loans, court orders and more.

Our payroll module includes:

- Single page payroll processing
- Inbuilt workflows and alerts to reduce administration time
- Easy to manage data deletion according to your GDPR policies
- Weekly or monthly timesheets that support varying combinations of flexitime, overtime, TOIL and more
- Customisable payslips
- Bulk paper payslips available with easy print
- Extensive options available to manage employee mileage
- A full suite of management reports which allow you to view and control all spend
- Ensure compliance with HMRC regulations and your organisational procedures

- Manage complex elements, such as Local Government pension, spinal points, multiple posts and more



## Pensions

XCD automates all pension calculations, covering the full range of contribution bases, including auto enrolment and pension salary sacrifice, personal pension schemes, local government or teacher schemes.

Our pensions engine can manage auto enrolment, additional voluntary contributions (AVCs), and regular pension contribution calculations. Automated pension reporting is a built-in part of the Payroll process.

- Pension payroll on a monthly or quarterly basis
- Easy to manage pension records
- Pension contribution reports and dashboards

## Reward

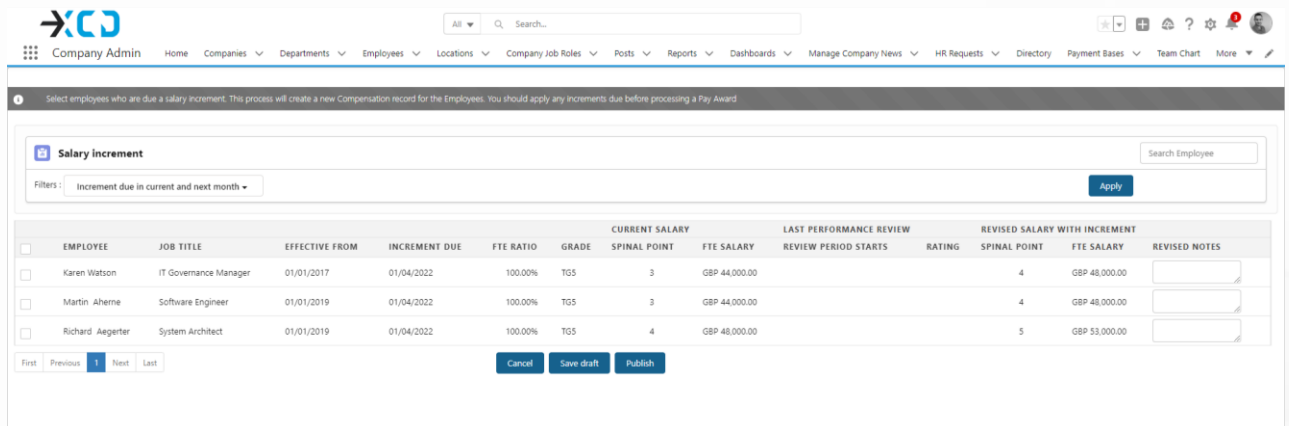
Manage all employee rewards easily with simple and effective security, one view for all information and clear information on organisational impact.

- Salary increment managed from single screen
- Flexible incremental due dates available, linked to employee appointment date on post

## Other key features include:

- Self-validating BACS processing
- Third party BACS payment for recipients such as HMRC, union, court orders, GAYE, health insurance
- Retrospective payment with automated associated calculations

- Full audit trails
- Comprehensive payroll and payment reports
- Automated leave and pay calculations for irregular workers
- The option to simplify your processes with fully managed payroll services



**Salary Increment**

Select employees who are due a salary increment. This process will create a new Compensation record for the Employees. You should apply any increments due before processing a Pay Award.

Filters: Increment due in current and next month

Search Employee

|                          | EMPLOYEE         | JOB TITLE             | EFFECTIVE FROM | INCREMENT DUE | FTE RATIO | GRADE | SPINAL POINT | FTE SALARY    | LAST PERFORMANCE REVIEW<br>REVIEW PERIOD STARTS | RATING | REVISED SALARY WITH INCREMENT<br>SPINAL POINT | FTE SALARY    | REVISED NOTES |
|--------------------------|------------------|-----------------------|----------------|---------------|-----------|-------|--------------|---------------|-------------------------------------------------|--------|-----------------------------------------------|---------------|---------------|
| <input type="checkbox"/> | Karen Watson     | IT Governance Manager | 01/01/2017     | 01/04/2022    | 100.00%   | TGS   | 3            | GBP 44,000.00 |                                                 |        | 4                                             | GBP 48,000.00 |               |
| <input type="checkbox"/> | Martin Ahern     | Software Engineer     | 01/01/2019     | 01/04/2022    | 100.00%   | TGS   | 3            | GBP 44,000.00 |                                                 |        | 4                                             | GBP 48,000.00 |               |
| <input type="checkbox"/> | Richard Aegerter | System Architect      | 01/01/2019     | 01/04/2022    | 100.00%   | TGS   | 4            | GBP 48,000.00 |                                                 |        | 5                                             | GBP 53,000.00 |               |

First Previous 1 Next Last

Cancel Save draft Publish

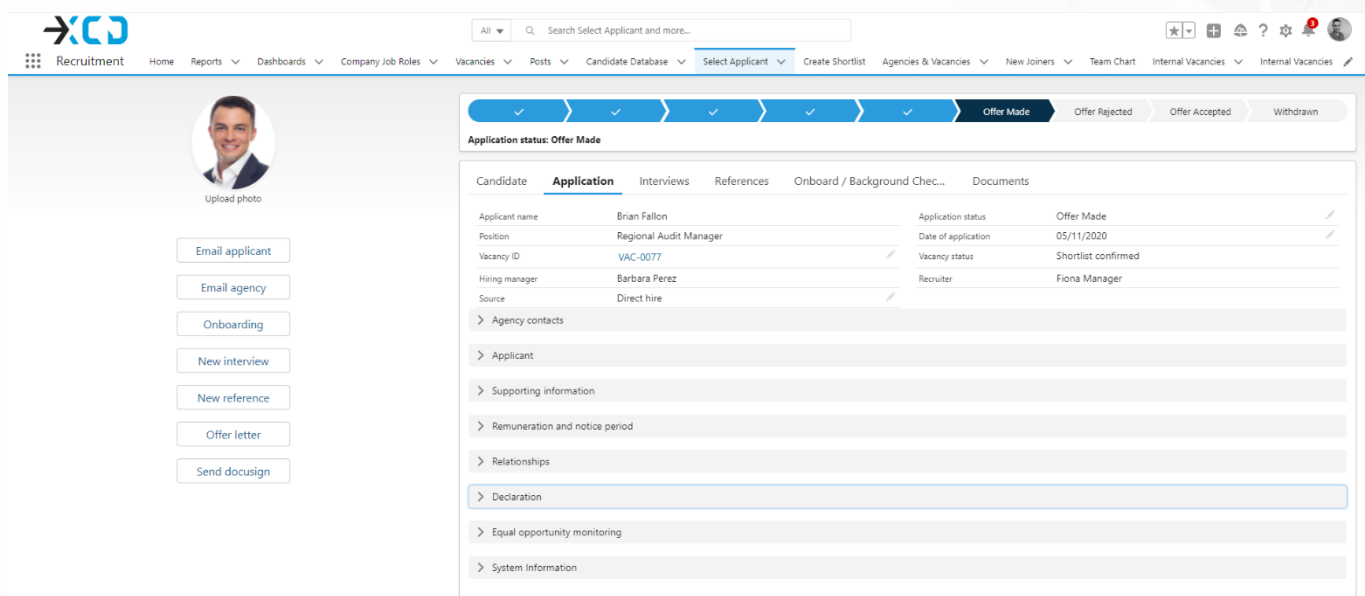
# Talent Management

XCD allows you to effectively manage all aspects of your talent management strategy, with reduced admin burden on human resources, allowing organisations to concentrate on future-proofing teams. XCD's talent management module includes:

## Recruitment

As your organisation grows, keep track of the entire recruitment process, from publishing new vacancies right through to onboarding with our HR recruitment software.

- Intelligent recruitment using our online portal to create, approve and publish vacancies
- Automate every step of your onboarding process
- Candidates can log in to enter required information and upload cover letters/CVs
- Quickly compare the candidate, the job description, person specification and other candidates
- Paperless technology: Contracts sent through the solution, allowing the candidate to sign online



The screenshot shows the XCD Recruitment software interface. The top navigation bar includes links for Recruitment, Home, Reports, Dashboards, Company Job Roles, Vacancies, Posts, Candidate Database, Select Applicant, Create Shortlist, Agencies & Vacancies, New Joiners, Team Chart, Internal Vacancies, and Internal Vacancies. The main content area displays the 'Application status: Offer Made' screen. On the left, there is a profile card for a candidate with a photo and buttons for 'Email applicant', 'Email agency', 'Onboarding', 'New interview', 'New reference', 'Offer letter', and 'Send docuSign'. The main area shows a table with columns for Candidate, Application, Interviews, References, Onboard / Background Chec..., and Documents. The table contains one row for Brian Fallon, Regional Audit Manager, with application status 'Offer Made' and date of application '05/11/2020'. Below the table, there are expandable sections for Agency contacts, Applicant, Supporting information, Remuneration and notice period, Relationships, Declaration, Equal opportunity monitoring, and System Information.

## Complete Applicant Tracking System (ATS)

Following an acquisition in 2021, XCD are now happy to offer a complete ATS offering through sister company, Hireserve.

Hireserve ATS is a powerful Applicant Tracking System designed for in-house recruitment teams. Trusted by organisations in a diverse range of sectors, Hireserve ATS is used to streamline their recruitment processes, to automate administration and to reduce the time and costs associated with internal hiring.

Through our bespoke integration, you can now benefit from a complete and leading ATS as part of your XCD solution, offering a more comprehensive hire to retire offering.

## Benefits

- Using the power of the XCD and the flexibility of Hireserve, we can offer you an end-to-end solution, from candidate attraction to engagement and onto retention and payroll. The integrated platform does it all.
- You'll be able to create your recruitment need in XCD and watch as Hireserve is updated automatically, ready for the recruitment team.
- Once the right candidate is found, Hireserve will automatically create the new starter in XCD ready for your HR team to onboard.
- No need to double key anything: it's all done through the platforms seamlessly. Remove the worry of data integrity and data security.

## What will you be able to do?

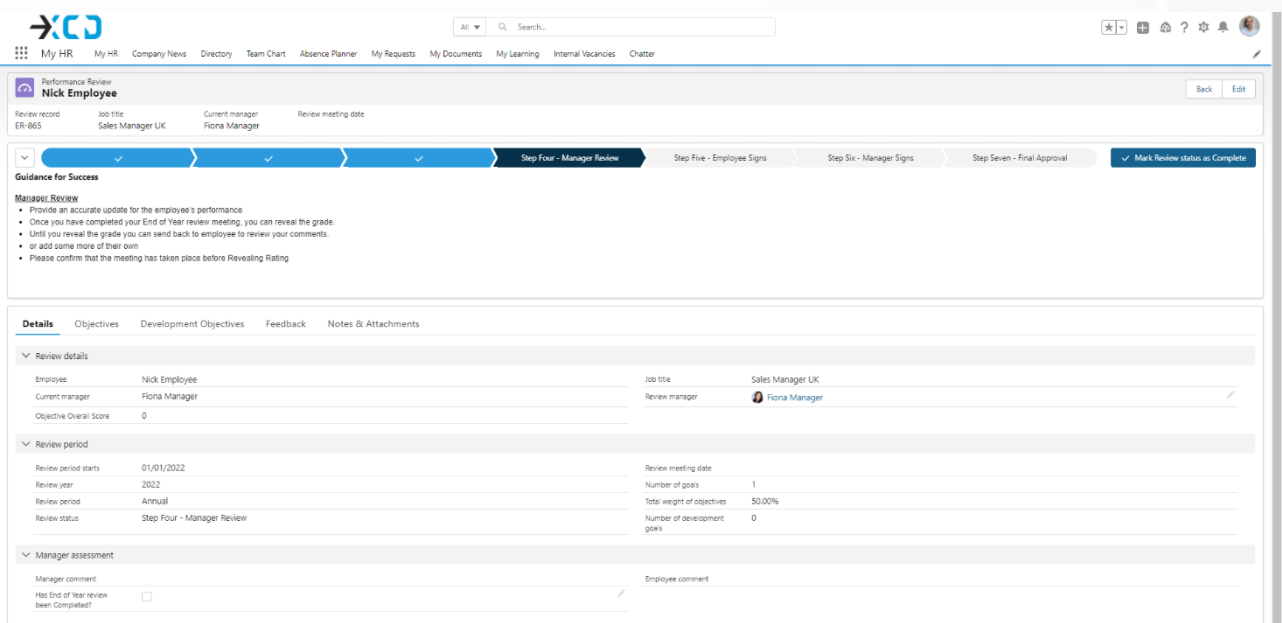
Our goal? To continue to reduce your recruitment and HR administration, free up your time and provide an enhanced experience for you, your colleagues and your new hires.

- Users can quickly and easily create jobs from existing roles and vacancy information stored in XCD.
- With SSO (Single Sign-On), users can seamlessly access both systems quickly and securely.
- Candidates will be converted into employees via connected processes between the two systems. For example, when a candidate is offered in Hireserve ATS, an onboarding process with XCD will be triggered.
- Users can approve a final vacancy approval step in XCD which then automatically creates a job in Hireserve ATS.
- Users can access a range of information from both XCD and Hireserve to analyse and report, including:
  - Candidate status update data within XCD for Hireserve job applications
  - Recruitment costs data within XCD for Hireserve job applications
  - Equal opportunities candidate data within XCD for Hireserve job applications
- Some users will be able to specify a certain type of candidate status update in Hireserve to trigger a push of the candidate into the XCD joiner process.

## Performance Management

Reduce admin tasks into bite-sized chunks, allowing you to focus on the assessment itself, improving the performance review experience for everyone involved.

- Fully configurable performance review forms
- Employees and Managers participate in review and documentation, with discrete contributions
- Automated alerts and reminders, eliminating time wasted chasing people for completion
- Connect employee objectives to your organisational strategy
- Connect developmental objectives to your organisational learning/skills library
- Facilitate continual feedback and continuous development
- Easy access for both employees and managers to participate in 360-degree feedback
- Managers can see employees' real-time progression



The screenshot shows the 'Performance Review' interface for 'Nick Employee'. The top navigation bar includes links like 'My HR', 'My HR', 'Company News', 'Directory', 'Team Chart', 'Absence Planner', 'My Requests', 'My Documents', 'My Learning', 'Internal Vacancies', and 'Chatter'. The main header shows the employee's name 'Nick Employee', review record 'ER-865', job title 'Sales Manager UK', current manager 'Fiona Manager', and review meeting date. A progress bar indicates the current step is 'Step Four - Manager Review'. Below the progress bar, there is a 'Guidance for Success' section with a 'Manager Review' sub-section. The 'Details' tab is active, showing review details, review period, and manager assessment. The review details section includes fields for Employee, Current manager, Objective Overall Score, Job title, Review manager, and Review meeting date. The review period section includes fields for Review period starts, Review year, Review period, Review status, Review meeting date, Number of goals, Total weight of objectives, and Number of development goals. The manager assessment section includes fields for Manager comment, Has End of Year review been Completed?, and Employee comment.

## Learning and Development

Your people are your greatest asset. Make it easy to identify their needs, develop their skills and knowledge, and build a future-proofed workforce.

- Centralise all information to set-up and manage your training
- Track learning courses and events with ease
- Invite the right people to the right courses and manage enrolment and waiting lists
- Enable employees to view courses, enrol and request a place online
- Learning activity synced to Outlook and Google calendars as required
- Enable managers to approve attendance and budget
- Completed training activity automatically updates related skills and competencies to match development requirements

# Timesheets & Work Cycles

Make every second count in the workplace. Reduce the time spent on admin tasks and ensure you pay employees accurately and on time with a system that provides simplicity and transparency, making your life simpler.

## Timesheets

Seamless and flexible timesheets allow for accuracy, timely completion and reduced admin processes.

- Track employee and project time easily and effectively
- Range of timesheets available for different situations, i.e. casual workers, flexible time, overtime and more
- Overtime captured through timesheets can be processed through payroll
- Automated alerts and reminders to complete timesheets
- No login required; automate everything with a Thermal Biometric Scanner (TBS)
- Employees are able to clock in and out
- All leave bookings automatically mapped through to timesheets
- Where appropriate, pay people based on logged timesheet hours
- Complete visibility and comprehensive reporting



0.72 s 376.69 KB

Timesheet
Employees
Payroll
Timesheet
Reports
Dashboards

Timesheet

Employee Andrew Adams Job Role Director of Communications Month August-2017 GO SAVE CANCEL

Status Not Submitted

| DATE/TIME  |     |       | HOURS WORKED       |                  | AND | DUE                  | LEAVE       | BALANCE        |                       | FLEX-TIME          |                    |
|------------|-----|-------|--------------------|------------------|-----|----------------------|-------------|----------------|-----------------------|--------------------|--------------------|
| DATE       | DAY | NOTES | START TIME (HH,MM) | END TIME (HH,MM) |     | TOTAL WORKED (HH,MM) | DUE (HH,MM) | BOOKED (HH,MM) | DAILY BALANCE (HH,MM) | ADJUSTMENT (HH,MM) | FLEX TOTAL (HH,MM) |
| 01/08/2017 | Tue |       | 09 : 01            | 18 : 30          |     | 8.29                 | 7.00        | 0.00           | 1.29                  | 0.00               | 6.41               |
| 02/08/2017 | Wed |       | 09 : 01            | 18 : 30          |     | 8.29                 | 7.00        | 0.00           | 1.29                  | 0.00               | 6.41               |
| 03/08/2017 | Thu |       | 09 : 01            | 18 : 30          |     | 8.29                 | 7.00        | 0.00           | 1.29                  | 0.00               | 6.41               |
| 04/08/2017 | Fri |       | 09 : 01            | 18 : 30          |     | 8.29                 | 7.00        | 0.00           | 1.29                  | 0.00               | 6.41               |
| 05/08/2017 | Sat |       | 09 : 01            | 18 : 30          |     | 8.29                 | 7.00        | 0.00           | 1.29                  | 0.00               | 6.41               |
| 06/08/2017 | Sun |       | 09 : 01            | 18 : 30          |     | 8.29                 | 7.00        | 0.00           | 1.29                  | 0.00               | 6.41               |
| 07/08/2017 | Mon |       | 09 : 01            | 18 : 30          |     | 8.29                 | 7.00        | 0.00           | 1.29                  | 0.00               | 6.41               |
| 08/08/2017 | Tue |       | 09 : 01            | 18 : 30          |     | 8.29                 | 7.00        | 0.00           | 1.29                  | 0.00               | 6.41               |
| 09/08/2017 | Wed |       | 09 : 01            | 18 : 30          |     | 8.29                 | 7.00        | 0.00           | 1.29                  | 0.00               | 6.41               |
| 10/08/2017 | Thu |       | 09 : 01            | 18 : 30          |     | 8.29                 | 7.00        | 0.00           | 1.29                  | 0.00               | 6.41               |
| 11/08/2017 | Fri |       | 09 : 01            | 18 : 30          |     | 8.29                 | 7.00        | 0.00           | 1.29                  | 0.00               | 6.41               |
| 12/08/2017 | Sat |       | 09 : 01            | 18 : 30          |     | 8.29                 | 7.00        | 0.00           | 1.29                  | 0.00               | 6.41               |

## Work Cycles

Where employees work a regular pattern but different hours each day, XCD's Work Cycles tool makes this complex process simple.

- Comes pre-loaded with a standard library of work cycle templates, but also offers almost limitless flexibility for customers to create their own templates
- Work cycle lengths may vary e.g. seven day or 28 day cycle
- Work cycles can begin on any day
- Automate calculations around leave entitlement, hours of absence for requested leave, and total hours worked each day
- Calculate part-period pro-rata payments
- Automatically updates annual leave summary record if the employee's work patterns change

Work cycles can incorporate virtually any composition or duration, based on the unique factors within your organisation.

## Appreciation

For development of a positive workplace culture and to empower your people to success, we have introduced a module for employee recognition and appreciation. This facilitates peer-to-peer recognition through the introduction of a company-wide Chatter Channel.

To boost your employees' experience, this includes core features such as:

- Ability to define accolades according to your existing policies
- Flexibility to tailor appreciation to your organisational values
- Data and analytics functions to measure culture and cohesion in your departments and teams
- Enhancing connectivity between remote, hybrid and office-based workers
- Ability to use as a standalone platform

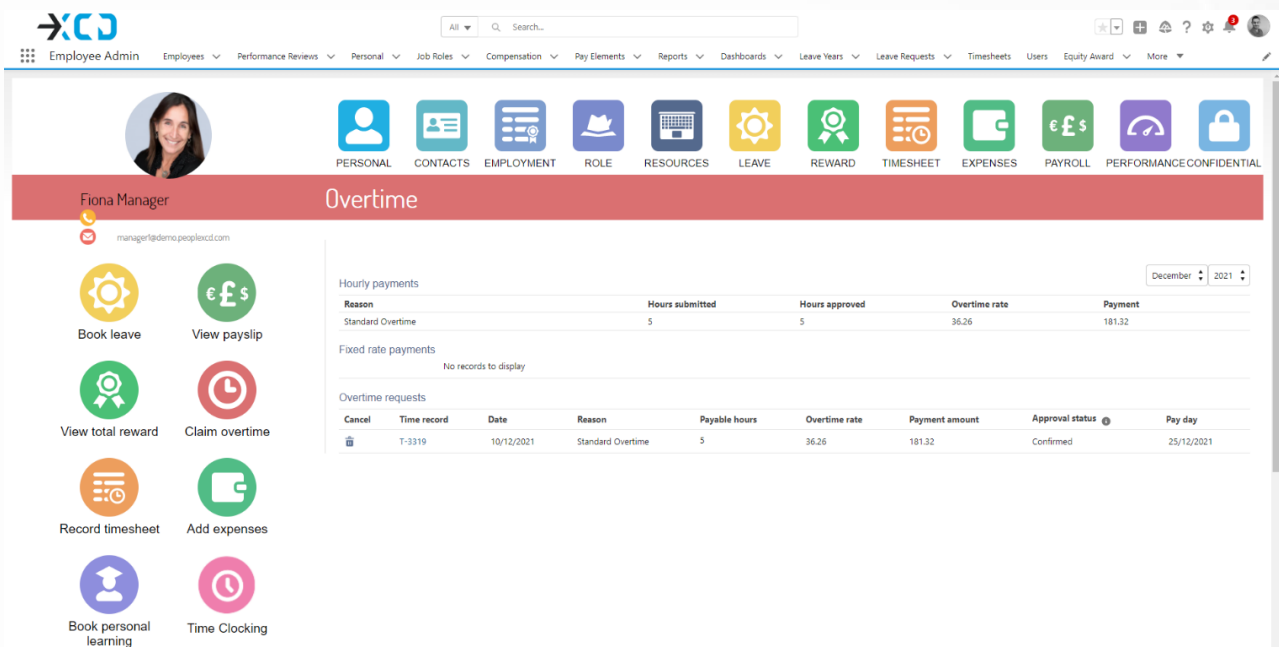
Existing clients who have incorporated this module have found it to empower employees to acknowledge and reward their colleagues' work, boost feelings of unity and develop greater cooperation within an organisation.

# Overtime & Expenses

## Overtime

Ensure accuracy and transparency with all overtime hours through custom authorisation levels and straightforward processes to enable self-service.

- Supports many types of overtime: On call, fixed and variable rates, variable overtime hours with associated multipliers'
- Automation of overtime calculations
- Restrict overtime claims to authorised employees
- Simple process to make and approve claims
- Send payment information directly to payroll or pay separately through BACS if required
- Managers can process bulk overtime data submissions for team and/or group of employees



The screenshot shows the XCD Overtime interface. At the top, there's a navigation bar with various menu items like Employee Admin, Employees, Performance Reviews, etc. Below this is a user profile section for Fiona Manager. The main area is titled 'Overtime' and contains several sections:

- Hourly payments:** A table showing 'Standard Overtime' with 5 hours submitted and approved, at a rate of 36.26, resulting in a payment of 181.32.
- Fixed rate payments:** A message stating 'No records to display'.
- Overtime requests:** A table showing one request for 'Standard Overtime' on 10/12/2021, with 5 payable hours, a rate of 36.26, a payment amount of 181.32, and an approval status of 'Confirmed'.

On the left side of the Overtime section, there are several icons for related functions: Book leave, View payslip, View total reward, Claim overtime, Record timesheet, Add expenses, Book personal learning, and Time Clocking.

## Expense Claims

Move your organisation into the future and gain a broad understanding of your expense claims; create and share reports and make it easy to follow processes and prepare for audits with our expenses management functionality.

- Submit, upload receipts and approve expenses and mileage using desktop or the XCD mobile app
- Automatically populate journey distance in miles or kilometres
- Multi-currency expenses supported
- Multi-role expenses assignment, processing and reporting
- Simple approval process, with multi-level available if required
- Manager or administrator may amend expenses on employee's behalf
- Assign and process expenses for multi-job role employees
- P11D reporting

## Data Backup and Restore

The XCD solution is delivered on the Salesforce platform, and therefore benefits from significant, world-class backup and disaster recovery infrastructure and investment. In addition, customers can choose to integrate third party backup tools available from the Salesforce AppExchange to further meet their own data needs. XCD will work with the customer to help define this and propose the most appropriate solution.

### **It is important to understand the differences between data types (data and metadata) and what is included in each backup method:**

Data refers to all of your records, including Employees, Job Roles, Compensation, Benefits and other records. Data also includes your custom object records, files, content, and Chatter.

Metadata refers to all of your configuration settings, such as custom fields, page layouts, Reports, Dashboards, and custom code like Apex and Visualforce.

### **Why backup data?**

Even with the best of intentions, users and administrators have been in situations where they have either deleted large amounts of data, or have modified records, only to later realise that a mistake was made.

### **Why backup metadata?**

Just as it is easy for users to accidentally delete records or modify records, it is also easy for administrators and users with advanced permissions, to make changes to your configuration settings, such as adding or deleting custom fields, modifying page layouts, deleting or changing Reports and Dashboards.

### **What about restoring my data?**

To help customers routinely back up their data, several native options are available to customers. There are also several third-party options that can be leveraged when a more comprehensive approach is needed. XCD will work with customers to establish the correct level of backup required.

## Continuity and Recovery

“Salesforce maintains a Disaster Recovery plan that supports a robust business continuity strategy for the production services and platforms. This plan has been developed from industry-accepted methodologies and encompasses principles of high-availability engineering. The Disaster Recovery plan is constantly measured against strict regulatory and governance requirements.”

**Salesforce continuity statement**

## Data Backup and Recovery

### Native Data Backup Options

- **Data Export Service:** Manual or scheduled exports of your data via the UI.
- **Data Loader:** Manual on-demand exports of your data via the API.
- **Report Export:** Manual on-demand exports of your data via reports.

### Native Metadata Backup Options

- **Change Sets:** Copy metadata from your production org to a sandbox or developer org.
- **Sandbox Refresh:** By refreshing a related sandbox, your configuration metadata is copied over automatically.
- **Force.com Migration Tool:** Java/Ant-based command-line utility for moving metadata between a local directory and a Salesforce org.
- **Force.com IDE:** Client application for creating, modifying, and deploying Force.com applications.

### Third-Party Offerings

There are a number of data backup solutions offered by our partners on the AppExchange. Some of these are more comprehensive in that they allow you to automate backups of both your data AND your metadata and provide a mechanism by which to restore that data easily. You can search for these by visiting the AppExchange directly and searching for keyword backup.

### Salesforce statement on system privacy and security

“At Salesforce.com, there is no higher priority than the privacy and security of our customers’ data. We believe that protecting the privacy of our customers’ data is integral to our mission of earning and maintaining the trust of each of our customers. We seek to lead the industry as a trusted repository for customer data through a world-class privacy program and provide a secure infrastructure and flexible tools that help enable our customers to comply with global privacy and data protection regulation.”

## Ordering & Invoicing

The Client shall pay the Implementation Fee, the Licence Fees and any additional fees or charges in accordance with the Service Order and the details contained in invoices issued by XCD.

The client shall pay within 30 days of the invoice date unless otherwise agreed. Initial upfront payment, as specified in the Service Order, will be invoiced upon agreement of the Contract and annual fees will be invoiced annually in advance.

All amounts and fees stated or referred to in the Contract are non-cancellable and non-refundable and are exclusive of value added tax, which shall be added to XCD's invoices at the appropriate rate.

## XCD Community

XCD users are actively encouraged to feed ideas and suggestions into our extensive product development roadmap.

This is done in three ways:

- Regular Special Interest Group meetings, where subject specialists are invited to attend sessions on the latest thinking and developments in a particular area of HR or Payroll, and what they mean for XCD users.
- Annual User Group meetings, where our entire user community gets together to connect with our system experts, share advice and tips on how to get the most out of the XCD software, and discuss future functionality they would like to see incorporated into the product.
- The XCD Ideas Portal, an online platform that allows users to suggest new features they would like to see built. Users can vote on other ideas to help us prioritise, and they can follow the progress of their suggestion from ‘idea’, to ‘in development’ and ‘deployed’.

"It's so refreshing to work with a software supplier who actively works with users to develop the product together."

Customer feedback

## XCD Development Roadmap

The XCD research and development team invests over 9,000 days in improving and updating our product every year.

XCD's product development roadmap is managed and agreed in collaboration with the XCD Community, through the 'ideas portal' and the SIG events, providing a transparent process for customers to influence where and how we direct our R&D resources.

## After Sales Support and Service Levels

### After sales account management

Our Customer Success team works with XCD customers to ensure they get maximum value from their system, right from the onboarding process and throughout the duration of the contract. This includes introducing new capabilities, sharing best practice and industry insight, hosting events like our Special Interest Groups – where we delve into specific elements of the system – and acting as your point of contact for all non-support related questions and suggestions. Our core aftersales support is driven by 3 levels of customer success plan (as per our pricing document accessible via the Digital Marketplace). The key benefits for our Standard, Premium and Platinum plans can be summarised as follows:

|                              | Standard  | Premium   | Platinum  |
|------------------------------|-----------|-----------|-----------|
| Customer Portal Access       | X         | X         | X         |
| LMS Access FOC Modules       | X         | X         | X         |
| Case Management              | X         | X         | X         |
| Functional Overview Sessions |           | X         | X         |
| CS Review Sessions           | Quarterly | Quarterly | Monthly   |
| 3rd Line Support Access      |           | X         | X         |
| User Group Access            |           | X         | X         |
| Training Credits             | 7 hours   | 21 hours  | 35 hours  |
| Support Review Sessions      |           | Quarterly | Monthly   |
| Premium Support Community    |           | 2 users   | 5 users   |
| Health Check Credits         |           | 1 p/annum | 2 p/annum |
| Tech CSM Sessions            | 1 p/annum | 4 p/annum | 8 p/annum |
| LMS Access All Modules       |           |           | X         |
| Premium Event Access         |           |           | X         |
| Early Adopter Priority       |           |           | X         |

## XCD system support

XCD understands the importance our software plays in securing our customers' data, protecting confidentiality, and enabling you to maximise efficiency and productivity. We view our Support Services as a critical component of our customers' success and are committed to providing a reliable, high-performance service.

In the event your HR or Payroll Administrator needs XCD support, a case can be reported via the XCD Community Portal, which can be used to track the progress of your case. The XCD Community Portal also contains a huge resource of searchable 'how to' articles and troubleshooting tips.

**Support times:** Monday to Friday 09:00 to 17:30 (Excludes UK Public Holidays)

Our service desk will provide a case reference number and assign a service level. You should use the reference number in all future communications regarding this case. When a support case is raised, our Service Desk will assess the appropriate service level and case category, perform 'triage' and then either resolve the case or escalate CS-Engineer.

### Case categories

- **Incidents:** Unplanned interruptions (or degradations) to the service, whereby the system is not functioning as designed. Incidents are covered under SLA.
- **Service requests:** A request for assistance (such as training, new fields, reports, dashboards, workflow, approvals, communication templates, data uploads etc) whereby the system is functioning correctly, but XCD's assistance is required. These requests are covered under the XCD Premier Support Package or will be scoped out by our Professional Services Team to provide a quote.

### Case priority levels and resolution SLAs

| Severity         | Description                                                                                                                                           | Target Case Resolution                                   |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|
| <b>Emergency</b> | An incident which has rendered your production application inoperable, severely impacting business operations                                         | 24 hours                                                 |
| <b>Critical</b>  | An incident which significantly impacts your business operations, or there is a data security risk, but the site or application continues to operate. | 48 hours                                                 |
| <b>Normal</b>    | Any other incident                                                                                                                                    | 5 business days – workaround (if required and available) |

Other requests will be considered as an Enhancement Request for future releases. Case resolution will be marked as completed when the Service Desk communicate to the customer that the incident is resolved.

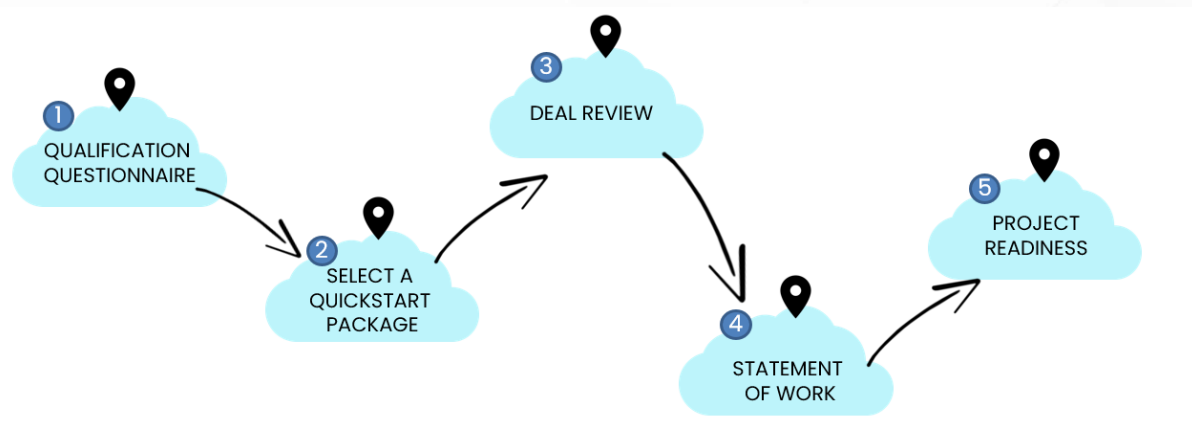
## Onboarding & Offboarding

With XCD, implementation is swift and secure. We maintain a range of QuickStart options which provide pre-packaged implementation options, each with tailored with a well-defined scope, predictable duration, and transparent cost structure. This offering has been designed to streamline and accelerate onboarding customers on to our software solution in a structured and efficient manner.

We will the suitable QuickStart plan will be agreed as part of the sale and refined/agreed in detail in the initial part of the project. Your assigned HR & Payroll implementation consultants will be with you every step of the way:

### Understanding your requirements

Our formula for success starts with this - scoping out the real issue with you to identify how the XCD system can help transform your human resources. Our sales team will work with your team to understand your processes, objectives, culture, and challenges and select the right implementation package to suit your needs. This will include the following qualification and scoping steps:



1. Our sales team will support you to complete our Qualification Questionnaire
2. This will enable us to identify the suitable QuickStart package to match preferences and requirements
3. Our Sales team will present the chosen package and reasoning for this on the Deal Review
4. We will then create a customer-specific Statement of Work for you
5. We will provide Project Readiness tasks to you at Preferred Vendor status

### Crafting a solution that works for you

We like to think big but start simple, phasing implementation to ensure a strong platform is built

initially making it easy to build upon with additional features and automation in the future allowing you to set the pace and direction for the rest of the journey.

## Service constraints

During onboarding, we will work with you to identify all technical pre-requisites to underpin effective implementation and later service delivery. Our service has the following minimum requirements:

- Suitable browser (Google Chrome or Microsoft Edge recommended)
- An Octane score of 20,000 (30,000 recommended)
- Network latency of 200 ms or lower (150 ms recommended)
- Download speed of 1 Mbps (3mps recommended)
- At least 5GB RAM, 2GB available for browser tabs
- 8GB Ram, 3GB available for browser tabs recommended

## Implementation Flexibility

XCD offer flexibility in implementation by offering multiple options for implementation from leveraging the standard XCD out of the box solution, to a more configured solution, both of which can be supplemented with additional modules to align the HR & Payroll solution with your processes and procedures. Additional configuration is completed by a Salesforce Advanced Administrator, either from the client or from XCD.

The 3 plan options for different levels of customisation and support can be summarised as below:

| Plan                      | Features                                                                                                                                                                                                                                                                                                     | Typical duration* |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|
| <b>QuickStart</b>         | <ul style="list-style-type: none"> <li>• Fastest implementation</li> <li>• Suited for low-complexity organisations with single entity</li> <li>• Focused on standard XCD solution</li> </ul>                                                                                                                 | 15 weeks          |
| <b>QuickStart+</b>        | <ul style="list-style-type: none"> <li>• Suited for medium complexity organisations requiring some tweaks to base solution, normally up to 4 payrolls</li> <li>• Handholding and consultancy support with customisation and project management</li> <li>• Quick realisation of benefits and value</li> </ul> | 18 weeks          |
| <b>QuickStart Premium</b> | <ul style="list-style-type: none"> <li>• Enhanced project design, implementation and testing to navigate complexities</li> <li>• Can include integration with other applications</li> <li>• Suited for large organisations with wider (potentially global) footprint</li> </ul>                              | 24 weeks          |

\*Durations are indication of maximum likely duration but with all times due to be reduced in 2024.

## **Super user training**

XCD start users on the system by involving them at an early stage in the project. The approach we use is that of Knowledge Transfer from the XCD Consultants to the customers Project Team. We expect that the customers Project Team will become "Super Users" of the system. It will be the responsibility of the customers Project Team to deliver End User Training to the End Users of the system. XCD can deliver End User training if requested but our normal approach is to create Super Users, as described. A suite of eLearning modules will also supplement the learning experience.

## **Offboarding**

If a contract comes to an end, we will work with customers to assist them in how to extract any or all their data from the XCD system. This will take the form of consultancy to advise customers in what tools are available to export data OR to extract the data on behalf of the customer.

This is a chargeable consulting activity which would be scoped and estimated on an individual customer basis and this cost is not included in the ongoing cost of the contract with XCD.

## **Access to data**

When a contract comes to an end, we will work with you to assist in extracting any or all of your data from the XCD system in a quick, seamless and secure manner. This will take the form of consultancy to advise your team in what tools are available to export data or to actually extract the data on your behalf. You will also have the ability to export data directly without support or advice using the standard Salesforce tools. This is a chargeable consulting activity which would be scoped and estimated on an individual customer basis.

# **The Implementation Process**

Our professional services team work closely with all our clients to configure and deploy the XCD system. Each new client is assigned a project team and project governance model, which will be overseen by the project director.

While we start with our Core HR and Payroll products, you could also choose to implement additional modules as part of a programme of work or add them later as required. We believe flexibility is key to grow your system as your organisation grows. Our implementation process follows six clearly defined stages:

- 1. Initiate**
- 2. Design**
- 3. Build**
- 4. Test/Training**
- 5. Deploy**
- 6. Closure**

## **Stage 1: Initiate**

This is where the XCD Project Manager formally kicks off the project and works with the client Project Manager to agree a project and resource plan. Both items are required to be formally approved before the project can continue to the next stage.

During this stage the governance structure for the project is also put in place. A steering board should be formed, and regular monthly Steering meetings arranged to keep the project on track. The last action in this stage is to arrange dates for design workshops.

Another key facet of this stage is project readiness, our XCD consultants will run through our project readiness requirements which will allow you to be fully prepared to enter the next stage and set you up for success within the project.

## **Stage 2: Design**

During this Stage we conduct a series of design workshops, depending on the chosen package. These workshops are run by XCD consultants and include your project team members. They capture the initial configuration requirements for the XCD application and culminate in the creation of a solution design document.

During these workshops, we will discuss any specific additional business process and / or interface requirements with other systems. Once complete, the solution design document will provide a signed off 'blueprint' for the implementation project.

Data: Perhaps the most intensive part of an implementation project is the data preparation, cleansing, uploading and verification. During the design stage we explain to each client how we upload data by providing a set of data load templates.

## **Stage 3: Build**

Taking the output from the solution design document, we start to configure your system. This includes setting up organisation and contract term rules, departments and teams, leave years, specific leave categories, compensation rules, benefits, pensions, awards and deductions. This is where we may also create any additional configuration to cover specific processes required for 'Go Live'.

Data Load & Data validation: During this stage we perform a full data load and undertake a data review using standard reports and dashboards to identify any data errors or additional data requirements.

## **Stage 4: Test/Training**

Our consultants will deliver user training to the project team, either on-site or remotely as required. Following training, project team members will be super users, able to pass on training to end users. XCD consultants can also provide end user training where required (additional costs apply).

Sessions will include walk throughs of the system and user guides, and usually take place as a pre-requisite to User Acceptance Testing (UAT).

UAT: You are now required to test your system, checking that the configuration (based on the solution design document agreed at the design stage) performs as you expect. This is a critical stage and the focus should be on testing your end-to-end processes to ensure the team are comfortable with your new system and how it will integrate into your organisation.

Production Data Load: A final data load would take place just prior to Go Live (if Core HR only) or Parallel Run (if Payroll is in scope).

Parallel Run: On a project that involves Payroll in addition to UAT, you will be required to perform a parallel run to check that the Payroll data and calculations match those of your legacy system.

Once UAT & parallel runs have been successfully completed the project moves onto the deploy stage, where the system is ready to “Go Live”.

## **5: Deploy**

End User Training: The end users of the system should now be trained by your super users just prior to Go Live.

Cutover: Once testing, parallel run, and production data load have been completed the final checks are performed and the system launched to end users.

## **6: Closure**

Post Go live support / Hypercare: XCD’s HR & Payroll consultants support you through the initial go live phase until formal handover to our Customer Support team and you will be allocated a Customer Success Manager.

Support Handover: The XCD Project Manager will formally hand over to the XCD Support team, who will be your main point of contact on an ongoing basis.

Project Closure: The XCD Project Manager will formally close the “Project” at this point.

## **Future Phases / follow on activities**

Change requests: Once you’ve worked with your configuration for a while, additional required tweaks may make themselves apparent. This could include adding new fields, moving fields or implementing different workflows and processes. These requirements should be raised with the Customer Support team.

## Why XCD?

The XCD system harnesses the latest business cloud technology to provide a suite of Employee Relationship Management tools that enable Public Sector organisations to be better employers, providing personalised employee experience, management, development and reward with significantly reduced admin.

XCD offers market-leading flexibility and configurability that, crucially, provides ease and simplicity to our customers, like easily managed flexible working, leave and absence, simple access to sophisticated reporting and analytics, and seamless HR & Payroll delivery.

The system leverages the powerful automation and analytics capabilities of the Salesforce cloud platform, turning people data into actionable insight.

Our consultants are specialists in the streamlining and redesign of HR & Payroll processes, and our modular design means that your implementation can be tailored to your specific organisational needs.

Say goodbye to spreadsheets, manual data transfers and solutions your employees struggle to adopt. XCD's pioneering 'single solution' application provides one destination for all HR & Payroll data management tasks through a user friendly, responsive user interface that your people will look forward to using.

One log in and one intuitive, consistent user experience.

## Contact Us

Call us: +44 (0) 800 043 293

Email us: [info@peoplexcd.com](mailto:info@peoplexcd.com)

Visit our website: [www.peoplexcd.com](http://www.peoplexcd.com)