

SERVICE DEFINITION DOCUMENT

IRIS CASCADE

.IRIS

Contents

About IRIS Software Group	4
About IRIS Cascade	4
Becoming extraordinary	4
End-to-End HR Management.....	4
Empowering your workforce.....	5
Data-Driven decision making	5
Build your system, your way	5
Security and compliance	5
Core HR Functionality	5
Empowering People. Enabling Progress.....	5
HR management – as standard	7
Attendance and holiday management	8
Intuitive reporting tool.....	8
Unique dashboard.....	8
Manage employee records.....	9
Matched branding	9
Employee Engagements	9
Query builder	10
System designer	10
IRIS Cascade Modules	10
Workflow Module	11
Self-Service & Workflow.....	12
Performance Management	12
Organisation Charting.....	12
Document Management	12
DocuSign e-Signature	12
Learning and Training Management.....	13
Compliance	13
Reporting	13
Self-Service.....	13
MyCascade app	13
Payroll Software	14

Integration and HR API	15
Recruitment Software	15
Customer Training	16
Customer Responsibilities	16
Implementation	16
Pricing	16

About IRIS Software Group

IRIS helps organisations to make better business decisions by developing integrated software solutions to minimise admin, make business processes more efficient and give more time to do what's valued.

Our software and services are used by accountants, schools, and teams in payroll, HR and finance to solve some of the most important operational business problems. These include the need to remain compliant with the law, drastically reducing time on administration and reporting; and generating actionable data insights to make better business decisions. We invest heavily in development using the latest processes and technologies in the IRIS Product Development Centre to build the next generation of cloud-based SaaS accountancy, payroll, HR and education solutions.

Our global and domestic payroll and HR solutions are used by nearly five million employees. Almost one million UK employees are managed by our HR solutions, and one in six UK employees are paid through IRIS payroll solutions.

About IRIS Cascade

In the dynamic landscape of human resources, HR professionals need a reliable and sophisticated tool to manage their daily operations with precision and confidence. IRIS Cascade is designed to meet the intricate demands of HR departments, offering an effective, secure, and fully integrated system that ensures your HR practices are efficient and compliant. From hire to retire (and everything in-between), IRIS Cascade helps you to manage the whole employee lifecycle.

Becoming extraordinary

Routine HR tasks can be automated to free the time, talent, and energy of HR professionals, so they can focus on doing the work they love. Whether it's providing valuable insight to the board to help achieve strategic business goals or maximising employee engagement, the adoption of IRIS Cascade leads to a more dedicated, productive workforce and drives improved business performance.

End-to-End HR Management

From recruitment and onboarding to personal development and offboarding, our comprehensive solution streamlines every stage of the employee journey. IRIS Cascade automates processes and provides one convenient place for all your people data, the system streamlines your HR activity - saving you time and money.

Empowering your workforce

The self-service functionality is an integral part of IRIS Cascade, granting employees and managers direct access to pertinent information and tasks. This fosters transparency and self-sufficiency within your workforce, alleviating the burden on HR teams. This strategic shift allows HR professionals to focus on higher-value initiatives, such as utilising key employee metrics to identify workforce trends and problem areas, analysing employee turnover and workforce diversity and monitoring the cost of recruitment and absence.

Data-Driven decision making

With powerful reporting tools and a dynamic visual dashboard, IRIS Cascade provides real-time insights and analytics. This empowers HR professionals to make informed decisions based on accurate and up-to-date data. Manage staff absence, attendance, and holidays with a user-friendly interface that offers tracking and approval systems, ensuring that your workforce is well-organised and responsibilities are clearly defined.

Build your system, your way

Flexibility is at the heart of IRIS Cascade. Our software is highly configurable and offers a suite of modules, catering to the unique needs of each business. You can begin with our HR module as standard, adding additional modules as your requirements evolve.

Security and compliance

IRIS Cascade ensure the utmost protection of sensitive employee data against unauthorised access. Moreover, our platform adheres meticulously to the latest data protection regulations and industry standards, providing HR teams with the confidence to navigate complex compliance landscapes seamlessly. IRIS Cascade is accredited with ISO 27001 (Information Security) and ISO 9001 (Quality Management) so you know your data is held securely.

Core HR Functionality

Empowering People. Enabling Progress.

IRIS Cascade is a comprehensive, cloud-based HR management platform trusted by thousands of UK organisations—including many in the public sector—to streamline HR, payroll, and compliance. Built for flexibility, security, and compliance, Cascade empowers HR teams to drive efficiency, unlock actionable insights, and support a modern, distributed workforce.

Features

- **Comprehensive, Modular Platform:** Cascade's fully integrated HR and payroll suite is modular, so you only pay for and deploy the features you need—core HR, payroll, recruitment, performance management, analytics, and more. This ensures cost-effective scaling as your organisation evolves.
- **Deep UK Legislative Compliance:** Built from the ground up for UK statutory and legislative requirements, Cascade supports English, Scottish, and Welsh tax rates and GDPR. Automatic updates keep you compliant with the latest regulations.
- **Cloud-Native, Secure, and Accessible:** With ISO 27001 and ISO 9001 accreditations, Cascade delivers enterprise-grade security and quality management. Its cloud-based infrastructure enables secure access from anywhere, supporting remote and hybrid working while reducing IT overhead.
- **Advanced Workflow Automation:** The configurable form builder and workflow engine allow you to digitise and automate even the most complex HR processes—onboarding, approvals—freeing up HR teams for strategic work.
- **Self-Service and Employee Empowerment:** The intuitive self-service portal empowers employees and managers to manage their own data, request leave, access payslips, and complete tasks independently, reducing HR admin workload and increasing engagement.
- **Comprehensive Absence & Attendance Management:** Track holidays, absences, and attendance with built-in approval workflows and transparent reporting.
- **Integrated Reporting and Analytics:** Real-time dashboards and analytics provide HR and leadership teams with the insights needed for evidence-based decisions, transparent reporting, and compliance with public sector audit requirements.
- **Organisational Charting:** Dynamic org charts display real-time employee and job data, supporting workforce planning and organisational design.
- **Document Management & E-Signatures:** Securely store, categorise, and manage documents of all types, with integrated DocuSign for streamlined electronic signatures.
- **Seamless Integration and Open API:** Cascade integrates with a wide range of third-party systems, including finance, time and attendance, and recruitment platforms. Its open API supports data exchange and interoperability, critical for digital transformation and legacy system integration.

- **Dedicated UK-Based Support:** Clients benefit from dedicated account management, UK-based support, and sector-specific expertise, with industry-leading response and resolution times.
- **Continuous Innovation and Accessibility:** Cascade is continually enhanced with a modern user interface, improved accessibility features, and new modules for employee engagement and statutory pay, ensuring it remains at the forefront of HR technology.

Benefits One System, Total Control: Manage your entire workforce and HR processes from a single, centralised platform, reducing complexity and risk.

- **Accuracy & Assurance:** Ensure employees are paid correctly and on time, every time, with HMRC-recognised payroll and automated compliance updates.
- **Efficiency Through Automation:** Streamline repetitive tasks and business processes, saving time and reducing errors, so HR teams can focus on strategic priorities.
- **Actionable Insights:** Leverage real-time analytics and dashboards for greater workforce visibility, smarter decisions, and transparent public sector reporting.
- **Best Practice Workflows:** Benefit from proven, best-in-class HR processes designed to optimise the flow of work and support public sector requirements.
- **Holistic Organisational View:** Visualise your company structure for effective planning and agile response to change, with dynamic org charts and integrated data.
- **Centralised Data Repository:** Maintain a secure, single source of truth for all HR and employee data, with robust security and compliance built in.
- **Empowered Employees & Managers:** Enable self-service for routine updates and approvals, boosting engagement and productivity across your organisation.
- **Enhanced Engagement:** Foster a dedicated, motivated workforce with tools that support communication, recognition, and growth.
- **Seamless Integration:** Easily connect Cascade with your existing systems, supporting digital transformation and maximising your technology investments.
- Rely on a partner with deep experience in the public sector, dedicated UK-based support, and a strong track record of successful G-Cloud projects.

HR management – as standard

With a huge amount of standard functionality, IRIS Cascade is a powerful HR tool. Upon log-in, you are presented with a welcoming, easy to digest dashboard, updated in real-time and tailored to your business needs. Charts, tables, and reminders relevant to you personally, will show you the actions you need to take each day.

Easy to use analytical tools give you deep insight into your workforce to support the decision-making process about the future direction of your business.

Additional functionality includes:

- Attendance and holiday management - reducing administrative burdens
- Organisational charts - giving you visibility of the overall organisation
- Document management - store documents in one place
- Customisable branding – available throughout the system to fit with your organisation's brand
- Employee engagements – ability to configure engagements, whether text or videos to targeted users to support company communication

Administrators can use IRIS Cascade to manage the attendance and holiday allocation of their company's workforce, as well as analyse data and create reports with the powerful reporting function. Every user with access to the system has their own dashboard, which they can customise to show the information most important to them. The system can be even further customised so that it displays a company's logo and matches their branding.

Attendance and holiday management

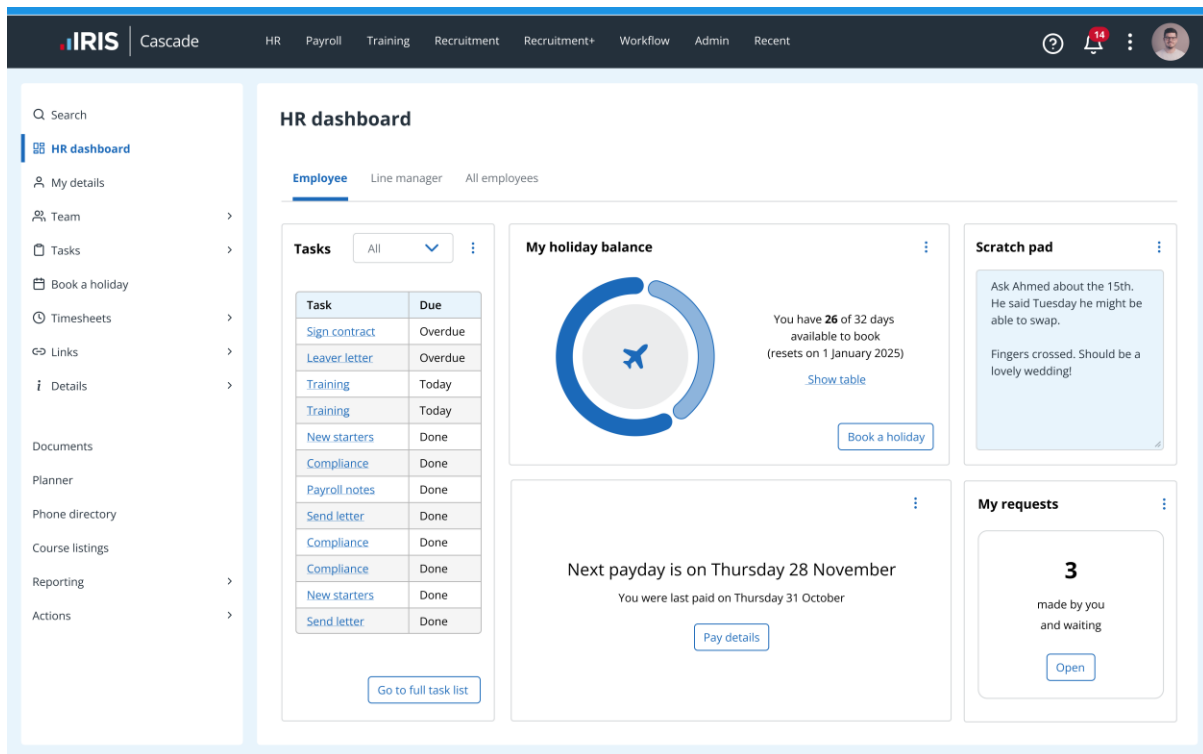
HR administrators and line managers alike can use the system to manage the attendance and holiday allocation of their staff. An employee's absence is noted in the system and assigned to their record, meaning it can be easily tracked and any concerns raised. Staff can book holidays in the system themselves and this, too, can be equally easily monitored.

Intuitive reporting tool

The powerful reporting tool is easy to use and can analyse complex data, identify trends, measure cost-derivatives and plan future actions simply and effortlessly. In addition is the query builder function, which can proactively generate scheduled reports according to the criteria you set.

Unique dashboard

The dashboard comprises of a set of user definable charts and tables which are built by queries created by the user, meaning users can display information on their homepage that is most relevant to them. Up to 8 charts can be displayed and resized to help the user make the most of the space available.



The Enhanced Dashboard gives a user full control over the data they see in dynamic charts, which can be resized to ensure the most relevant information is delivered to them as soon as they log in.

Charts are responsive and can be resized to make the most of the space available, with the ability to inform data driven decisions and improve the people analytics of a business.

Manage employee records

The HR department can use the system to create comprehensive records for each member of staff, including information on job history, training documents, online payslips and more. This information is all held online, meaning it is always stored safely and securely.

Matched branding

The customisable design means an organisation can proudly display their logo within the system, as well as match the colour scheme to the branding.

Employee Engagements

Configurable employee engagement posts, whether its text or video content to specific users or all users, which is displayed when logged into Cascade, to further support

company communications.

Query builder

The query builder tool allows the user to gather whatever data they wish that is held in the system and create detailed reports based on set criteria. This could be anything from the contract status of staff to the holiday allowance of certain employees.

System designer

Although IRIS Cascade is a comprehensive solution, we recognise that, both at the implementation stage and on an ongoing basis, each of our clients will need to configure fields and screens to suit their ever-changing needs.

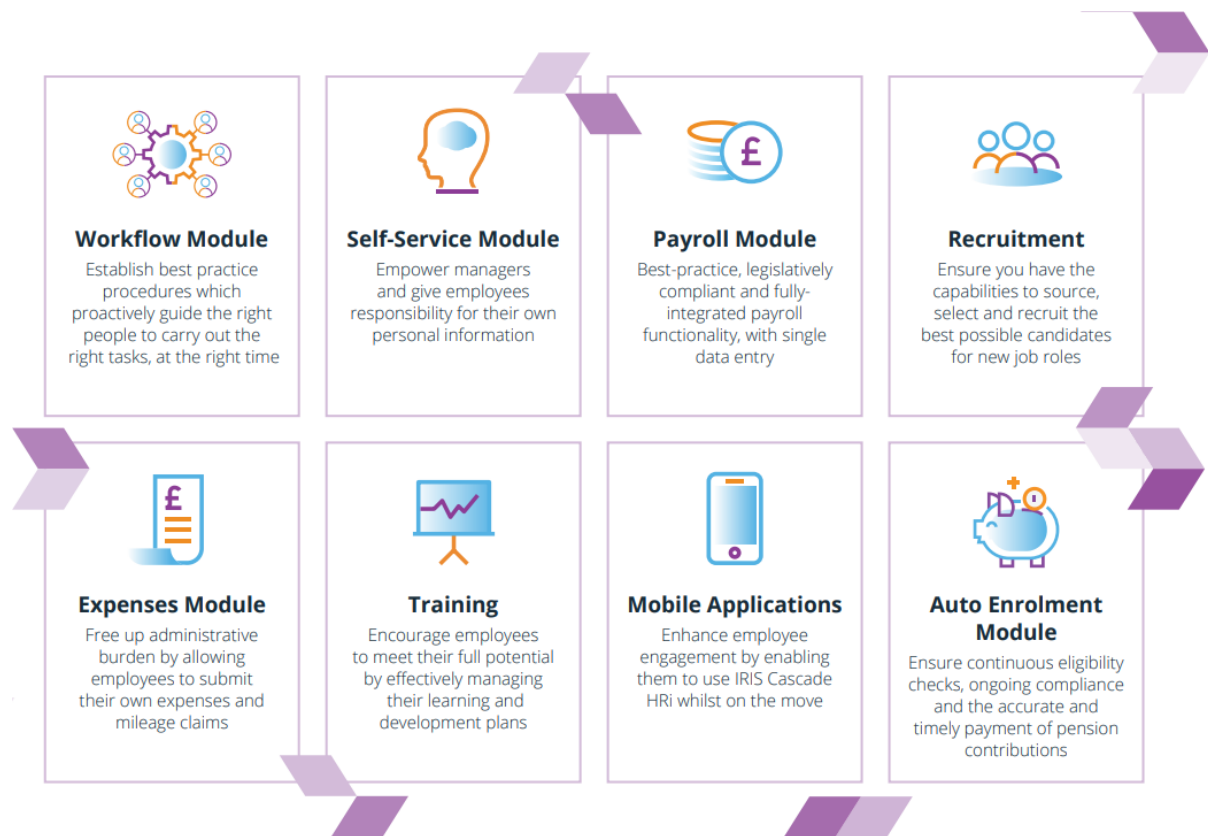
With IRIS Cascade's System Designer tool, the user (where the user is a trained designated user of the System Designer tool) has full access to perform the following changes to the employee screens:

- Add new fields of all types
- Add new database tables
- Add new screens
- Edit existing fields
- Edit existing layouts
- Edit existing screens
- Change screen names

Changes made do not adversely affect system upgrades and are retained indefinitely.

IRIS Cascade Modules

Please refer to the IRIS website www.iris.co.uk, company brochure or ask your IRIS Cascade Sales Executive if you would like more details regarding any of the individual modules available.



Workflow Module

Our HR solution has a Workflow Designer module and, additionally, the ability to configure triggers on individual fields (e.g. on a date field). The workflow tool is graphical and configurable ensuring the workflow follows your best practice business processes, rather than change your processes to fit the system. HR departments can introduce best-practice Workflows, guiding users through processes, and delivering forms, instructions, screens, and decisions to the right people at the right time. Ensure continuous workplace efficiency that supports your employees and guarantees that no tasks are left incomplete.

As an example, holiday authorisation can be sent to two or more managers, or can have more than one level of authorisation. The workflow also includes out of office delegation.

The workflow tool allows you to have triggers on the processes, so if a manager has not authorised a holiday request, it will send a reminder out to that manager. If the request is still unauthorised, it can then inform either HR or a higher Line Manager. Workflow can be accessed and actioned via email (no need for logging in).

Self-Service & Workflow

Our HR solution empowers your workforce to be wardens of their own data with both employee and manager self-service portals, which provide the end user with control over personal details, holiday/training requests and online payslips. HR administrators can automate these functions using built-in workflow functionality that coordinates the flow of processes and approval structures. Any functionality can be delivered to Self-Service users based on your own specific requirements. Screens, other than those controlled by security access levels, are identical to the core system. HR retains complete control over security, with easy-to-use security settings which allow control to field level over the entire system.

Performance Management

Our HR solution has inbuilt 9 Box Grid Records and a series of performance-related reports, which are the cornerstone of talent management. Offering the ability to see which employees need nurturing and development and which employees are a talent risk, these reports are configurable and flexible. Our HR solution also comes with a standard Appraisal workflow. This workflow includes 360-degree feedback from an employee's peers or colleagues. The workflow is configurable to suit your requirements.

Organisation Charting

Our HR solution has an inbuilt Organisation chart, which means that as soon as you add a new starter or make a change to an employee's record, this is automatically reflected in the Organisation Chart. These reports are printable and can have user defined viewable records.

Document Management

Scan, store, and retrieve all paper documents electronically, including those generated through our HR solution using our inbuilt Mail Merge functionality, as well as other electronic documents and email exchanges. External documents can also be effortlessly stored by scanning them into our HR system. The product offers you enhanced security, cuts cost and reduces the time spent on individual employee documentation.

DocuSign e-Signature

Benefit from our integration with DocuSign, enabling seamless e-signature capabilities for your documents. Whether it's promotion letters, training materials, or any other forms requiring employee signatures, you can easily upload them for quick and secure e-signing. As a DocuSign Silver Partner, IRIS offers you the added advantage of reduced costs of the e-signature envelopes.

Learning and Training Management

Our Learning and Training management solution empowers your organisation with optimal control over developing and retaining top talent. Our solution enables employees to easily launch web training and instantly access relevant development materials for full control of their personal development. By integrating with our HR solution, our learning and training system contributes to a comprehensive understanding of your workforce, allowing you to easily decide on the best training courses to develop your future leaders.

Compliance

All software is kept in line with the latest HR and Payroll legislation, through inbuilt tools and wizards which are free as part of the standard solution – to meet key requirements such as Pension Auto-Enrolment and RTI.

Reporting

The powerful reporting tool is easy to use and can analyse complex data, identify trends, measure cost-derivatives and plan future actions simply and effortlessly. In addition is the query builder function, which can proactively generate scheduled reports according to the criteria you set. All reports are easily produced within IRIS Cascade, using the standard tools. Similarly, scheduling of reports to designated users is a standard feature. Reports can be saved in Excel or PDF format. Records selected within a report can be drilled down to take the user to the employee record itself. Filters can be applied to reports so that users only see those business unit areas they are responsible for. Reports can be run at a single point in time (present, past or future); over a specified date range or over 'x' weeks

Self-Service

Our Self-Service portal is browser-independent and accessible via a URL link. The self-service portal is simple to view and use and includes options to change the look and feel.

When setting up the system, permissions can be easily set – limiting which actions employees are able to complete themselves without having to communicate with the HR department first. This means there is still an element of control for system administrators, but also an increase in employee engagement, by giving them appropriate responsibility.

MyCascade app

MyCascade app allows employees and managers to manage their requests, approvals and data on the go, using PWA (Progressive Web App) technology, the app can be downloaded straight to the device from MyCascade for via the app store.

Payroll Software

At IRIS Cascade, all our bespoke solutions are developed in-house. This includes our payroll module. By purchasing IRIS Cascade, you are investing in a completely integrated HR and Payroll solution from one supplier. We are as committed to providing a great payroll experience as we are to HR.

As the IRIS Cascade modules were developed in consultation with HR professionals, our payroll module is backed up by a team of payroll experts. They ensure that all legislative rules and rate changes are made in a timely and secure fashion. IRIS Cascade Payroll is a fully integrated module, which directly complements our HR system. Fully recognised by HMRC, purchasing IRIS Cascade Payroll will provide you with the peace of mind that over 3000+ individual HMRC quality checks can guarantee.

Changes in legislation are continuous and, at IRIS Cascade, we ensure that these changes are a crucial part of our wider payroll business plan, ensuring that both the product itself and our payroll consultants are fully up to date. The legislation upgrades performed are completely inclusive of the annual support fee, meaning there are no hidden charges.

A comprehensive interface between our HR and payroll areas also ensures that data sharing is strictly controlled, and that quality assurance is applied at all stages. Rather than utilising an 'import/export' routine behind the system, which is unseen and unmeasured, IRIS Cascade allows users to see and monitor data sharing at all stages.

- A single point of entry means no re-keying of data into the payroll system, and HR-led initiatives such as a global salary raise, or individual bonuses can be easily implemented
- Full integration allows payslips to be displayed online for Self-Service users and eliminates any data repetition
- Control checks and measures are user-definable and ensure that you can always authorise any necessary changes. Other changes can also be processed automatically
- Flexible pay cycles. Whether weekly, bi-weekly, lunar, or monthly, you can choose the pay frequency that fits your organisation
- Online payslips available to Self-Service users and via MyCascade. Online payslips save organisations time and money, whilst also being environmentally friendly
- Definable and derivable pay elements facilitate complete flexibility and accuracy of payments
- Statutory filing ensures compliance and accuracy
- SSP-SMP-SAP-SPP employee entitlements are automatically entered into HR, where rules can be established, and paid through Payroll accordingly
- Integration dashboard allows user-definable rules for levels of data sharing between HR and Payroll, including sign-off changes

Payroll Managed Services Available

For those organisations who have limited payroll resources, the IRIS Cascade Payroll Managed Service (CPMS) offers an extra level of support by giving you the ability to outsource your payroll process.

Why invest in CPMS?

- Complete peace of mind - our dedicated, CIPP-accredited payroll professionals will handle every aspect of your crucial financial processes
- Save time and improve efficiency - everything is centralised in Cascade HR – no duplication allows for significant time savings, a reduction in errors and more efficient overall process
- Consistency - as a single supplier, we can provide both your HR and payroll software, alongside your payroll/Bureau managed service – this allows for consistency for you in both our standards and communication
- Consolidate costs, keep control - our service allows you to consolidate costs without losing control to a third-party – we provide a fully integrated, 360 solutions

Integration and HR API

Integration into and out of our HR solution can be achieved in many ways ranging from simple file transfer and XML based transfers (txt, csv, xls, xlsx, xml), to our seamless database integration with our payroll system, using our Shared Table mechanism which allows the payroll function total control of data being passed across from HR. Conversely, HR system activities can continue even while payroll is being processed.

In addition to a plethora of integration and import/export tools, IRIS Cascade also has an HR API (Application Programming Interface) which allows customers to integrate Cascade as the system of record within their existing technology landscape and ensure a correct and accurate flow of data.

The HR API has also enabled an ecosystem of complementary 3rd party HR technology products that extend the reach of Cascade into many best of breed solutions which connect seamlessly to the IRIS Cascade HR platform – this covers a variety of areas such as workforce management, talent acquisition, engagement, surveys and financial wellbeing. This ecosystem is known as the IRIS HR Marketplace.

Recruitment Software

IRIS Cascade integrates seamlessly with IRIS Recruitment to optimise your recruitment processes from advertising through to appointment, providing the perfect platform from which to secure the highest calibre candidates. This fully scalable and flexible

solution can be added to your IRIS Cascade subscription to provide the tools you need to support every aspect of the recruitment journey.

Customer Training

We have several core training courses, which are delivered as an integral part of the implementation process. Before the requirements and solution configuration stage, training is delivered to those members of the client project team who will be directly involved in the process of implementing the system.

Hosted remotely or on the client site, the training is delivered 'hands on.' Each delegate is provided with their own training 'company' and exercise-based course materials. The training manuals are of excellent quality and provide a good reference point once the courses have been completed.

Our experience tells us that client project team members who have attended the training courses are much better equipped to engage fully in the implementation process.

Customer Responsibilities

Customers will be responsible for migrating data from any pre-existing systems into the standard templates that are provided for uploading into the service. Customers will be responsible for maintaining any standing data, and for data input of transactions once the service is live.

Implementation

IRIS Cascade projects vary in timescale in the same way that our clients vary in size, complexity, location, and requirement. Our clients range from those with hundreds to thousands of employees, can be single, multi-site or international and may choose any combination of modules. A typical project lasts 5 months from initiation, but can range from 2 months to 18 months depending on the client, their requirements, phases etc.

Pricing

HR and payroll software that is flexible, affordable, and accessible

If you have decided IRIS Cascade is the HR and Payroll software provider best suited to your needs – or our technology is at least on your shortlist – we know which question you will want answered next.

How much does it all cost?

Following the system implementation, IRIS Cascade offers an affordable, annual subscription for our cloud-based system. The subscription cost varies as it is based on the number of employees you have, and the modules you decide to invest in. The benefit of this pricing model is that it can save you the concern of a high upfront license fee at the beginning of the contract.

That means the software is more cost-effective and accessible for organisations of all shapes and sizes. Budgetary sign off can be more comfortable, too, as any initial charges are kept to more manageable levels, and your investment can be budgeted across several financial years.

www.iris.co.uk



Thank you

0344 815 5555 | www.iris.co.uk



linkedin.com/company/iris-software-group



facebook.com/IRISSoftwareGroup



x.com/IRISSoftwareGrp



instagram.com/irissoftwaregroup/

IRIS Software Group
Heathrow Approach
470 London Road,
Slough,
SL3 8QY

© IRIS Capital Ltd 2025

