

SERVICE DEFINITION DOCUMENT

STAFFOLOGY

HR



.IRIS

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Staffology HR

Powered by smiles

In-house HR is a powerful thing. It is the friendly face that welcomes newcomers to the company, helps keep track of whether someone has enough days left to take that amazing holiday, and sorts out changes of address and job titles as your work force move through their careers.

But that is not all that HR does. That is just the admin part.

HR also make sure that the company has a great culture, that the team is the right team to take the company forward, and that recognition is given to your superstars.

Here's where Staffology HR comes in – with Staffology HR, your people can self-manage most of the admin tasks, which leaves your HR team in a great position to do the cool stuff.

Staffology HR Tiers

All of our three tiers come with the support and services that you need to ensure that you get started on the right foot – with no hidden extra costs.

They all also include access to an online knowledgebase, along with email, chat and phone support.

All you need to do is to pick the one that works for you.

Visit our website for the most up to date features and developments:

<https://www.iris.co.uk/products/staffology-hr/>

Staffology HR Features

HR Management				
Personal & contract records	✓	✓	✓	✓
Position management (& multi roles)	✓	✓	✓	✓
Mobile app	✓	✓	✓	✓
Employee self-service	✓	✓	✓	✓
Application programming interface (API)	✓	✓	✓	✓
SSO & webhooks	✓	✓	✓	✓
Multi-factor authentication	✓	✓	✓	✓
UK bank holiday API	✓	✓	✓	✓
Manager self-service	—	✓	✓	✓
Company handbook	—	✓	✓	✓
Document upload	—	✓	✓	✓
Contract history	—	✓	✓	✓
Organisation chart	—	✓	✓	✓
Company & manager tree view	—	—	✓	✓
HR bureau				Available at an additional cost

Payroll				
Integration with Staffology Payroll	✓	✓	✓	✓
Managed payroll option	✓	✓	✓	✓
Data exchange with third party payroll	✓	✓	✓	✓
Payroll records	—	✓	✓	✓
Payroll history	—	—	✓	✓
Comp & benefits: reward statement	—	—	✓	✓
Comp & benefits: employee benefits	—	—	✓	✓
Comp & benefits: salary sacrifice	—	—	✓	✓
Salary modelling	—	—	✓	✓

Reporting ▲				
Basic reporting	✓	✓	✓	✓
Custom reporting	—	✓	✓	✓
Gender pay gap	—	—	✓	✓
Turnover analysis	—	—	✓	✓
Data audits	—	—	✓	✓
Bulk data update	—	—	—	✓
Bulk record assignment	—	—	—	✓
Mail merge	—	—	—	✓
Scheduled reports	—	—	—	✓

System ▲				
Full colour branding	—	✓	✓	✓
Add/customise logo	—	✓	✓	✓
Custom login screen	—	✓	✓	✓
Form builder	—	✓	✓	✓
Customisable levels of access	—	✓	✓	✓
Company communication	—	—	✓	✓
Screen builder	—	—	—	✓
Customise dashboard	—	—	—	✓

The functionality is described below:

Payroll Integration

Integrating HR and Payroll systems means that you can be sure that your data is correct in both places, on time, all the time.

There are multiple payroll integration options available, making it easy to ensure that all your employee details are coordinated, no matter where the changes are made.

Integration with Staffology Payroll

A simple option that allows you seamless, automated and real-time data transfer via API, and works harmoniously in both systems.

Improved connectivity helps your organisation manage your people and process their payroll readily. Clever systems mean that when you move data from HR to payroll to avoid duplication and human error, while you have the option of accessing payslips through either Staffology HR including the mobile app or Staffology Payroll.

Managed Payroll

Managed Payroll lets you outsource your payroll to IRIS, while you focus on running your business.

The IRIS Managed Payroll system is a BACS-approved payroll bureau, using the very latest in HR technological advances. Run by an expert team of experienced CIPP-accredited payroll managers, the system is fully scalable and can address the needs of everything from small micro-businesses to large corporations.

Position Management

Our Position Management module allows Staffology HR administrators to build a more flexible structure based on the roles required by the organisation and not on the individuals who currently occupy the roles.

The software enables assignment of employees to multiple positions, formally recognises multiple reporting lines and enhances workforce planning.

Staff serving more than one role

Position Management makes managing multiple-post structures extremely easy by allowing you to record multiple position & assignment information against employees. Position Management is ideal in education settings where staff can take several roles, for example a subject teacher who is also a head of year and an interim special needs coordinator.

Streamline the recruitment process

In many HR systems it can be impossible to create a position in the organisation until a new person has been hired. Position Management from Staffology allows administrators to create roles along with all the attributes of the role (salary, level, training requirements etc.) while the recruitment process is still underway.

Short-term secondments

While a new position remains unfilled a current employee can be added to that new position on an interim basis as well as maintaining their existing role. Once a new person is hired, they are assigned to the position.

All short-term roles can be added to the employee's assignment history and will show in their records.

External salary benchmarking

Salary levels can be assigned to positions and not the individuals who undertake the role. This allows for external salary benchmarking to be undertaken against positions. The results could show which roles will require additional salary uplifts and highlight when incumbents are significantly adrift from a market salary.

Four Advantages of Position Management Software

1. Career & succession management - Nurture future leaders within your business, reduce the risk of having vacant roles by managing professional development including employee performance and manager assessments.
2. Easily manage multiple reporting lines - Facilitate movement of employees, report on relationships at position-to-position level (rather than person-to-person) and ease data admin/maintenance with complex organisational structures.
3. Workforce planning - Simplify managing temporary/gig workers into and out of positions. Create the positions and assign workers as they come on board.
4. Improved data accuracy - Position attributes are defaulted, improving data integrity and reducing data entry errors for job assignments.

The screenshot displays the IRIS HR system interface for Safwan Kayat. The top navigation bar includes tabs for Personal, Contract, Assignments, Payroll, Absence, Accidents, Benefits, Documents, Equipment, Expense, Perform, Pro. Mem., Tasks, Time, Training, and Forms. The 'Assignments' tab is active, showing a list of assignments for Safwan Kayat. The list includes three positions: Head Teacher (18758, Start Date: 22/03/2023, 10 h/w, Primary Position), Head of Technology (12776, Start Date: 05/06/2024, 15 h/w), and Head of IT (12779, Start Date: 29/07/2024, 10 h/w). Each position has an 'Unassign' button. Below the list, the 'Head Teacher' assignment is expanded, showing details for Employee Details, Contract Type, Employee Type, Personal Grade, Primary Position, Overtime, and Company. The 'Assignment Absence' section shows Holiday Entitlement (35), Total Holiday, TOIL Earned, TOIL Taken, and Remaining Holiday. The 'Company' section shows Company Name (Staffology), Work Address Line 1, and City.

Position	ID	Start Date	Hours/Week	Primary Position
Head Teacher	18758	22/03/2023	10 h/w	Yes
Head of Technology	12776	05/06/2024	15 h/w	No
Head of IT	12779	29/07/2024	10 h/w	No

Employee Details	Contract Type	Employee Type	Personal Grade	Primary Position	Overtime	Company
Assign To: Safwan Kayat				Yes	No	Staffology
Start Date: 22/03/2023						
Contract End Date: 22/03/2023						
Cont. Service: 2 years 8 months 27 days						
Date of Availability						
Length of Service						

Assignment Absence	Total Holiday	TOIL Earned	TOIL Taken	Remaining Holiday	Total Sickness Taken
Holiday Entitlement: 35					
Hol. Brought Forward					
Hol. Buy/Sell					

Company	Work Address Line 1	City
Staffology		

Recruitment

To be the best, you need recruit the best people to work with you, but we understand that recruitment can be a lengthy and costly process to get right.

Recruitment software provides you with the tools needed to simplify your ways of working, ensuring applicant evaluations, tracking, and candidate engagement is simpler and more effective.

A simple system for attracting and tracking the best applicants

The recruitment software module plugs into Staffology HR, creating the complete recruitment solution that gives you the freedom to manage advertising and vacancies in the best and most cost-effective way.

With this fully functional ATS (applicant tracking system) you can create tailored vacancy pages, screen unqualified applicants and easily manage the full recruitment process from application to hire.

Because it is fully integrated with the rest of our HR software, the recruitment module also reduces your admin by automatically updating the online HR system with details of successful candidates.

Ensure processes never stop

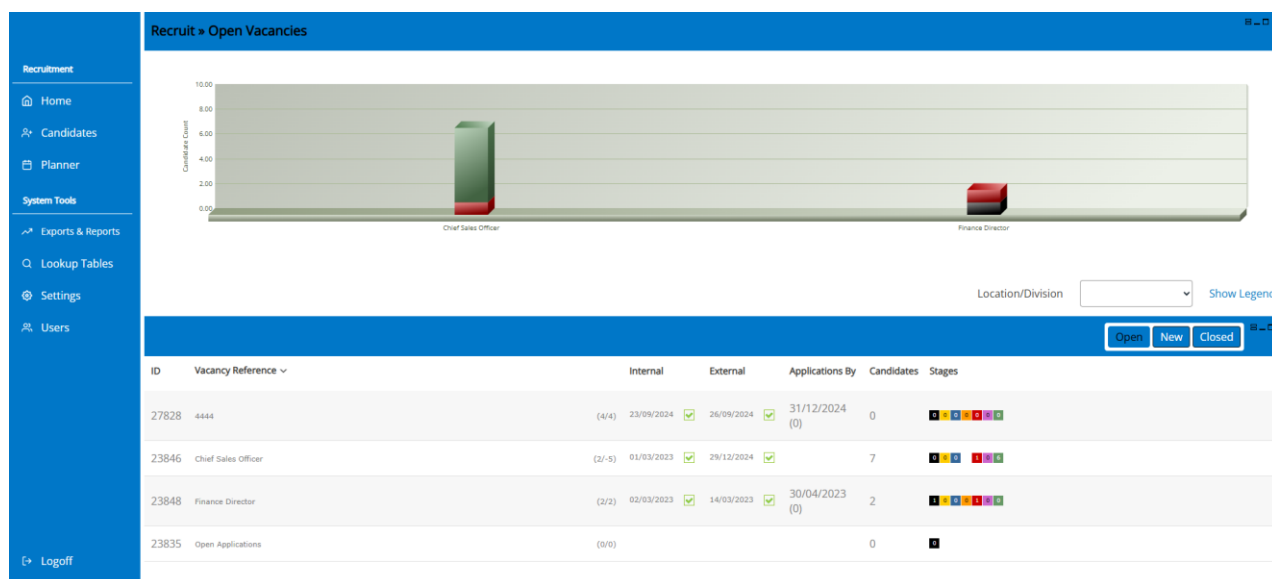
Utilise a clear audit trail, so if you're away, anyone can easily pick up where you left off to make sure your recruitment cycle keeps running.

- The user-friendly interface means that anyone can pick up the recruitment process
- Keep a detailed log of each interaction, ensuring you never lose track of your candidates' stage

All-in-one vacancy creator

Free up your valuable time by simply inputting a few details into the easy-to-use vacancy creator and sitting back as the system creates the job listing for you.

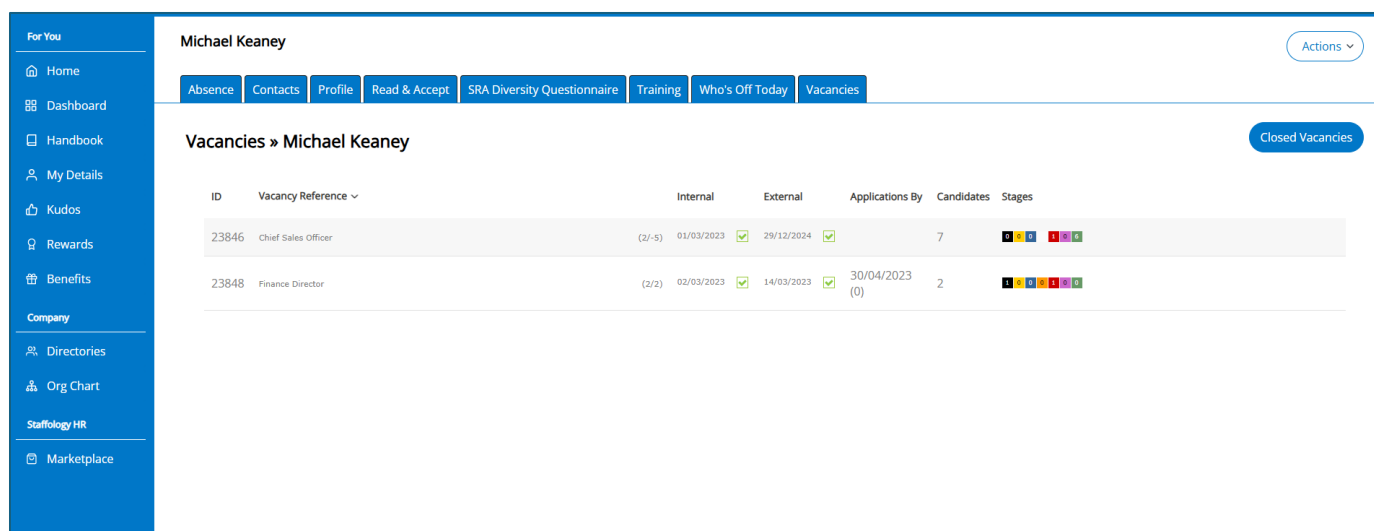
- Click into each job advertisement to see the number of applicants
- Easily check the status of each candidate within the system



Improve accessibility

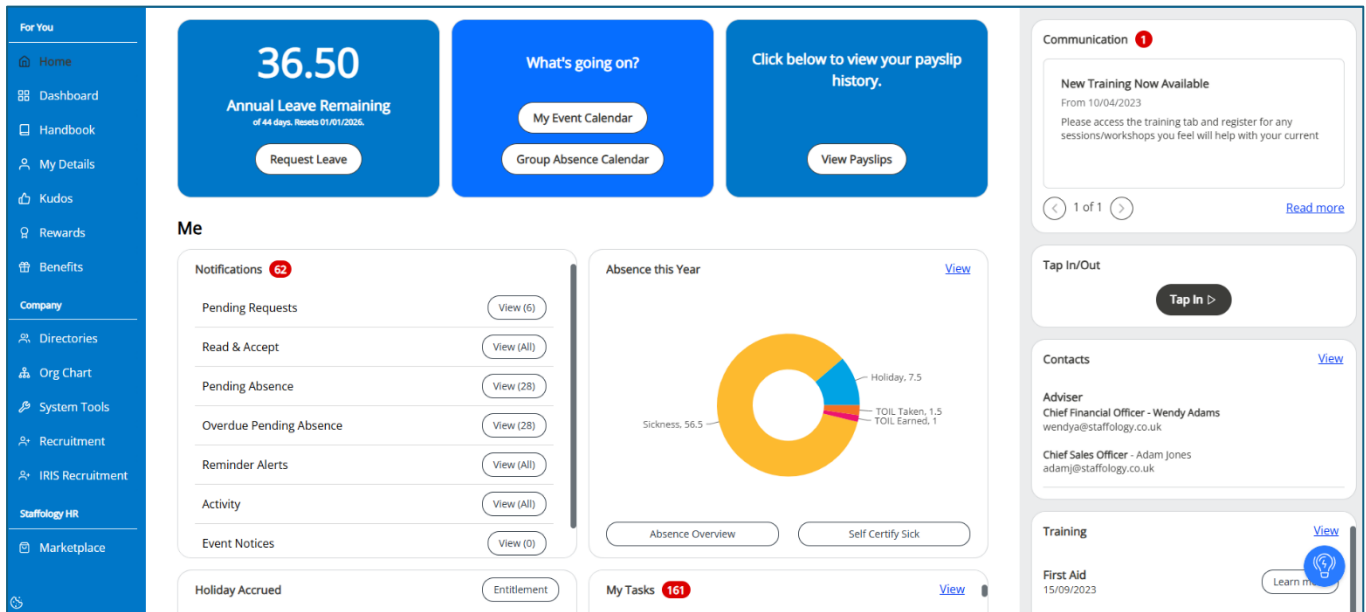
Speed up your recruitment by providing hiring managers access to candidate profiles through the system, enabling them to schedule interviews for promising applicants.

- One centralised location for everything recruitment
- Free up your time by empowering managers to look after their own job listings



Empower your people

Using the self-service functionality, employees can log in to the system and check their data whenever they want, rather than reaching out to their manager.



- Employee Profile Management
Employees can view and update their personal details, contact information, and emergency contacts.
- Leave & Absence Requests
Submit holiday requests, sick leave, and other absence types directly through the portal.
- Payslip Access
View and download payslips and P60s securely online.
- Timesheet Submission
Enter and manage timesheets for accurate payroll processing.
- Document Storage
Access company policies, contracts, and other HR documents in one place.
- Performance Reviews
Participate in appraisals and view performance feedback.
- Expense Claims
Submit and track expense claims for reimbursement.
- Training & Development
Access training schedules and development plans.
- Notifications & Alerts
Receive updates on approvals, policy changes, and important HR announcements.

- Self-Service Dashboard
A centralized dashboard for quick access to all HR-related tasks.

Timesheets

Ditch your old, time-consuming ways of working, and move to a smarter way of managing timesheets.

Timesheet software makes it simple for your employees to record their hours worked along with any overtime, streamlining the submission and approval process.

A smarter way to manage employee timesheets

Recording and submitting working hours has never been simpler than with Staffology HR's Timesheets Module.

The smooth processes are all completed online through a timesheet portal, so there is no need to print timesheets and fill them out by hand, freeing up your valuable time and resources. A reporting function has also been built into the electronic timesheet software, enabling you to highlight and analyse areas such as submission history, hours worked, and overtime completed.

Streamline your timesheets

By utilising automation, timesheets are automatically submitted accurately via e-mail to the approver to review in a quick and easy format.

- Eliminate the headache of receiving and ensuring timesheets are correct
- Save time with automation that completely removes the need for human intervention
- Set rules such as salary multipliers for distinct types of working hours such as overtime and weekends

Tailored to your business

The employee timesheet software offers a range of customisation options including Time rules calculations, allowing you to input who the work was done for, how many hours were worked and if any breaks were taken.

- The easy-to-use timesheet module is customisable to your needs, providing a pickup and go approach

- Alter processes within the module to meet your ever-changing needs, enabling the timesheet software to grow alongside your business

Time » Safwan Kayat

Default Time Type: Daily Shift | Flexible Dates | Add Time

Summary Cards:

- This Week: 0.00
- This Month: 0.00
- Past 4 Weeks: 6.00
- Past 6 Months: 0.00
- Absence Year: 0.00

Filters: ☐ Include Unsubmitted ☒ Include Pending ☒ Include Approved ☐ Show Amount

Type	Custom Lookup	Custom Text	Custom Text 2	Custom Lookup 2	From	To	Hours	Break	Total	Amount	Document	Notes
☒ Daily Shift					19/02/2024 09:00:00	19/02/2024 12:00:00	3.00	0.17	2.83	15,384.62	Attach	
☒ Daily Shift					25/01/2024 14:09:39	25/01/2024 14:10:03	0.02	0.00	0.02	0.00	Attach	
☒ Weekday Overtime					24/01/2024 14:09:39	24/01/2024 14:10:03	0.02	0.00	0.02	0.00	Attach	
☒ Daily Shift	Time And Attendance				23/01/2024 09:00:00	23/01/2024 19:00:00	10.00	0.00	10.00	51,282.05	Attach	
☒ Weekday Overtime					24/01/2024 11:58:21	24/01/2024 11:59:25	0.02	0.00	0.02	0.00	Attach	
☒ Daily Shift					08/12/2023 11:03:52	08/12/2023 11:04:08	0.02	0.00	0.02	0.00	Attach	
☒ Daily					17/11/2023	17/11/2023	...	...	...	...	Attach	

Simple reporting

The built-in reporting functionality allows you to run reports on the information provided within timesheets, such as hours worked and the number of staff completing overtime.

- Undertake strategic business decisions based on data
- Delve into the collected data to analyse work patterns and areas that require frequent overtime

Expense Management Software

Handling expenses can quickly become complicated, and mistakes can creep in when managed informally.

But by using our handy expense management software, you can enable employees to quickly record travel and expenses and submit them to the appropriate person for approval all in one convenient system, cutting down the risk of human error.

An effortless way for staff to manage their expenses

Using configurable codes and automatic exchange rate conversions, our expense management module for Staffology HR saves you time and resources by enabling employees to record and submit their expenses quickly and accurately.

Thanks to cloud functionality, users have the freedom to access the system from anywhere, at any time, meaning they can submit their expenses from home or on the go. The built-in expenses reporting tool also provides the opportunity for you to easily track how money is being spent across your entire business.

Track how money is being spent

Run reports on business expense information to gain insight into how much each department is expensing, what types of expenses are highest and how many are still being processed.

- Utilise the data for an enhanced understanding when making strategic business decisions
- Locate high-spend areas within your business and analyse where costs are going
- For simple requirements use pre-built reports or create custom expense reports for your more complex needs

Expense » Safwan Kayat

Summary of Expenses:

- This Week: 0.00
- This Month: 0.00
- Past 1 Week: 0.00
- Past 6 Months: AED 354.98
- Absence Year: AED 354.98

Filters: ☐ Include Unsubmitted ☒ Include Pending ☒ Include Approved

Type	Custom Lookup	Custom Text	Custom Lookup 2	Custom Text 2	Date	Zone	Units	Net	Tax %	Tax Amt.	Total	Document	Notes
☒ Dinner					03/11/2025	Europe (EUR)	0.00	15.00	0.00	0.00	15.00	Attach	
☒ Mileage					28/10/2025	Europe (EUR)	56.00	24.95	1.00	0.25	25.20	Attach	
☒ Dinner					20/06/2025	UK (GBP)	0.00	8.00	0.00	0.00	8.00	Attach	
☒ Mileage					18/06/2025	UK (GBP)	88.00	39.21	1.00	0.39	39.60	Attach	
☒ Laundry					11/06/2025	UK (GBP)	0.00	80.00	0.00	0.00	80.00	Attach	
☒ Mileage	Option 1	555	Option 1		05/12/2024	UK (GBP)	70.00	31.19	1.00	0.31	31.50	Attach	

Streamline your ways of working

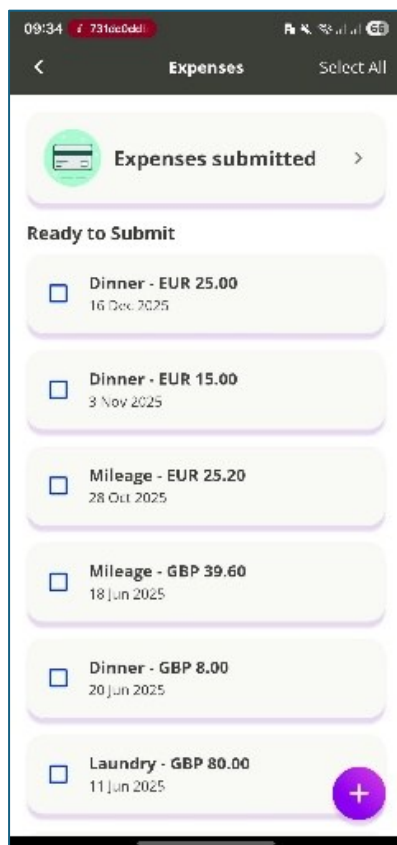
The intuitive expense recording system allows you to track multiple business expense claims per trip and organise them by type, client and date.

- Simplify the entire expense management process by utilising filters
- Separate multiple expenses made in single trips to ease the approval process
- Quickly locate specific expenses made within the system

Manage expenses on-the-go

With our cloud expense management software, all documents are saved securely on the cloud, enabling managers to access them at any time and providing employees with the option to submit from anywhere.

- Quickly access all your employees' expenses in one centralised location
- Place the submission responsibility on employees with the self-service functionality
- Access the expenses app from any device with an internet connection



Performance Management

Our employee performance management module is a smarter HR solution for small-and-medium-sized businesses looking to locate and resolve skill gaps in their workforce.

The software provides you with the tools to easily create PDPs (Personal Development Plans) that can help boost the engagement and productivity of your employees.

Learn more about our employee performance management module

- Boost your employees' engagement, effectively support their learning and development, and reduce your workload.
- The performance management system provides an end to the endless HR admin tasks, streamlining the process of creating tailored Personal Development Plans and completing staff appraisals.

Managers can also use the software to give staff more personal and detailed objectives which helps them understand how their work impacts the wider business, ensuring a motivated and productive workforce.

Putting the power in your hands

This HR performance management system is a fully flexible solution that can be customised to meet the exact needs of your business.

- The software grows with you, providing the option to be altered and tweaked alongside business growth
- No matter how complex your needs may be, the system can be tailored to meet your requirements

Optimise employee development

Create a structured framework and follow-up alerts to ensure the required actions are taken to support employees with their learning and development.

- Enable managers to set competencies and targets for their team
- Store employee development objectives directly on their profiles so that they can be referred to at any time
- Send employees notifications and reminders to help keep them on track

Analyse employee performance

The employee performance management system can take self-assessment information inputted by users and display it in a visual manner to help with performance conversations.

- Offer one centralised location for everything relating to employee performance
- Provide employees with a simple-to-use, cloud-based software in which they can complete assessments
- Help managers to easily assess data that can be used in their meetings

Training Management

Staffology HR's Training Module gives your people the freedom to continuously improve and develop, making sure your business is always moving forward.

By enhancing your HR system with training management software, you can streamline the endless administrative tasks associated with workplace training, enabling you to focus on maximising your peoples' potential.

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IRIS Recruitment

Staffology HR

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Safwan Kayat

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Assignments

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Absence

Accidents

Benefits

Documents

Equipment

Expense

Perform

Pro. Mem.

Tasks

Time

Training

Forms

Actions

Create New

Training & Qualifications » Safwan Kayat

CPD Analysis

Nov 2022 to Oct 2023

Hours27.00

Date From ^	Date To	Course Title	Development Status	Priority/Level	Category	Subject	Review Date		
15/09/2023		First Aid							
15/08/2023		Health and Safety			H&S	H&S			
31/05/2023	31/05/2023	Excel Course			A&B		31/05/2024		
14/03/2023	14/03/2023	Cyber Security			IT				
13/03/2023	13/03/2023	Health and Security			H&S				
08/03/2023	08/03/2023	Excel Course			A&B				

Online software to manage employee training

By providing a configurable training management system, you can speed up your HR processes to free up valuable resources.

The Staffology HR Training Module gives you flexibility when managing training programmes by fully integrating with the HR software. Also known as talent management software, it ensures a smarter approach to employee training and development.

Staff are assigned to a training course and automatically informed of where and when it will take place, as well as supplied with any pre-requisite documents that need to be completed prior.

Course organisation

Ensure you are no longer bogged down with paper processes and filing cabinets by creating a list of training courses that employees are booked onto in a clear table, which can be organised by date, category and subject.

- Offer a centralised location for employees to see what training courses are available
- Help employees find the training they want by allowing them to filter the available courses

For You

Home Dashboard Handbook My Details Kudos Rewards Benefits Company Directories Org Chart System Tools Recruitment IRIS Recruitment Staffology HR Marketplace

Safwan Kayat Actions

Absence Contacts Profile Read & Accept SRA Diversity Questionnaire Training Who's Off Today Vacancies

Courses Standard View

Name	Administrator
Cyber Security	Kayat, Safwan (TEMP)
Excel Course	Kayat, Safwan (TEMP)
First Aid	Kayat, Safwan (TEMP)
Health and Safety	Kayat, Safwan (TEMP)

Date From: 16/12/2025 Date To: 15/03/2026

Events (Cyber Security) from: 16/12/2025 to: 15/03/2026

Name	Administrator	Date From	Date To	Active
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Track attendees

The training management software's inbuilt reporting function gets rid of your manual ways of working, instead providing a comprehensive view of your training where you can see each training course and the employees associated with it.

- Instantly view the status of each employee on every training course to see whether they are approved, cancelled, declined, pending or waiting
- Drill down into your data to make better business decisions relating to training
- Save time by utilising a wide range of pre-built reports within the talent management software

Demand management

Our module enables you to offer courses on a first-come, first-served basis. Simply post the training and all the information around it, including CPD hours, points and even cost.

- Allow employees to register interest in fully booked courses, adding themselves to a waiting list
- Showcase any upcoming training and development courses
- Provide employees with added visibility of all available resources and courses

Form Builder

You are here because a paper-based way of working is slowing you down. Our Form Builder provides a smarter way for small-and-medium-sized businesses to

house documents securely, providing a centralised, cloud-based location that helps free up time and resources.

Digitising your way of working

Supercharging Staffology HR with the Form Builder module enables you to digitally replicate any paper-based HR forms you may have in your office and hold the completed versions against employee files.

This includes but is not limited to mental health surveys, working from home forms and workplace engagement questionnaires.

With the form builder, you have the added flexibility to decide if you want to create the forms yourself using the custom form builder functionality or choose from the various pre-built HR templates.

The screenshot displays the Staffology HR Form Builder interface. On the left is a blue sidebar with navigation links: Home, Dashboard, Handbook, My Details, Kudos, Rewards, Benefits, Company, Directories, Org Chart, System Tools, Recruitment, IRIS Recruitment, Staffology HR, and Marketplace. The main content area is titled 'Safwan Kayat' and features a horizontal menu with tabs: Personal, Contract, Assignments, Payroll, Absence, Accidents, Benefits, Documents, Equipment, Expense, Perform, Pro. Mem, Tasks, Time, Training, and Forms. The selected form is 'SME - Exit Interview » Safwan Kayat'. The form includes sections for 'Exit Interview', 'Private & Confidential', and 'Employee Details'. The 'Employee Details' section contains fields for 'Name of Employee' (a dropdown menu), 'Date Carried Out' (a date picker), and 'Leaving Date' (a date picker). Below these fields is a section titled 'What is your reason for leaving?' with a grid of checkboxes for various reasons: Better Career Opportunities, Career Change, Close to Home, Company Instability, Conflict with Managers, Conflict with Other Employees, Higher Pay, Improved Benefits, Improved Work Life Balance, Personal Reasons, Redundancy, Relocation, and Other. Each checkbox is accompanied by a red dot indicator.

A flexible approach to documents

The form software is incredibly easy to use and allows you to create the forms you need at the click of a button.

- Both employees and managers can easily use the software without training
- Quickly create new HR forms based on your business' current needs
- Send out forms in an instant to gauge employee opinion and engagement

Scalable to your needs

Build and save as many forms as you like to meet your ever-changing human resources requirements, providing the opportunity for the module to grow alongside your business.

- Benefit from unlimited storage and create as many forms as you need to meet your current demands
- Choose from a range of pre-built HR forms that cover the majority of Human Resources processes

Easily analyse your data

The reporting functionality within the form builder system means that you can quantify your data to ensure it is being used to its maximum potential.

- Look into the results and optimise your actions and strategic business decisions
- Gain instant insights into the topics that matter most to your business

Accidents Management

The **Accidents tab** in Staffology HR provides a centralised and secure way to record workplace incidents, ensuring all details such as date, time, location, and individuals involved are accurately captured. This structured approach supports legal compliance with regulations like RIDDOR, while enabling organisations to identify patterns and improve workplace safety. It also simplifies bulk data entry through integration with the Data Generator, making it efficient for managing multiple records. Additionally, the tab facilitates detailed reporting and investigation, helping track corrective actions and measure their effectiveness. Accurate records further assist with insurance and claim management, offering verifiable evidence when needed. Overall, the Accidents tab enhances compliance, safety, and operational efficiency in handling workplace incidents.

Screen Builder

With the **Screen Builder**, administrators can easily customise HR screens by adding, rearranging, renaming, or hiding fields. You can integrate up to 15 date fields, 15 lookup dropdowns, 15 text fields (25 chars), five memo boxes (~250 chars), five numeric fields, five tick boxes (yes/no), and five employee-lookup fields. This flexibility allows configuration across Personal, Contract, and Payroll tabs, tailored panel placement, and the ability to mark fields as mandatory, read-only, hidden, or “sensitive” for enhanced data visibility control.

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Lookup Tables

Utilities

Utilities » Screen Builder

Tab

Personal

Panel	Label	Core	Mand.	Alt. Label	Alt. Mand.	Alt. Hide	Read Only	Sensitive	Directory	Adviser
Panel name										
1	Title				☐	☐	☐	☐	☐	☐
1	Known As	☒	☒					☐	☐	☐
1	Forenames	☒	☒					☐	☐	☐
1	Middle Name			Middle Name	☐	☒	☐	☐	☐	☐
1	Surname	☒	☒					☐	☐	☐
1	Initials				☐	☐	☐	☐	☐	☐

Workflow

Workflows in Staffology HR automates routine administrative and employee processes by triggering tasks based on defined events—such as a new starter, absence, scheduled date, or leaver status—and assigning them to individuals or groups. Administrators configure workflows in three steps: creating the workflow with a trigger scope, defining tasks with timing (using date fields, offsets, and due dates), and optionally linking tasks in sequence to create a multi-step process—for example, schedule an exit interview, then conduct one. Benefits include automating repetitive tasks, enforcing consistency, ensuring timely completion, and customizing flows for different employee groups or actions. This flexibility drives efficiency, reduces manual effort, and ensures key HR processes are executed reliably and on time.

For You

Home

Dashboard

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My Details

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Rewards

Benefits

Company

Directories

Org Chart

System Tools

Recruitment

IRIS Recruitment

Staffology HR

Marketplace

Safwan Kayat

Communication

Exports & Reports

Lookup Tables

Utilities

Utilities » Workflow

Search

Clear

Create New Workflow

Tasks

Search

Category

Trigger

Name

Category

Trigger

Tasks

Active

Accidents	Accidents	Schedule	1	Yes	
Leavers	Leavers	Leaver	2	Yes	
Onboarding	New Starters	New Starter	5	Yes	
Disciplinary	New Starters	Schedule	1	Yes	
Return to Work	Sickness	Absence	1	Yes	

Benefit Management

Staffology HR's benefit management combines clear benefit tracking, personalised reward communication —all within a single, user-friendly system tailored to HR teams and employees alike with the option to add employee benefit platform using our HR Marketplace partners.

- Employee benefits tracking (e.g. life cover, private medical insurance, pensions).
- Reward statements, where employee benefits are clearly communicated.
- Features like salary sacrifice configurations, enabling efficient handling of tax-efficient pay arrangements.

Key Benefit Management Features:

Reward Statement

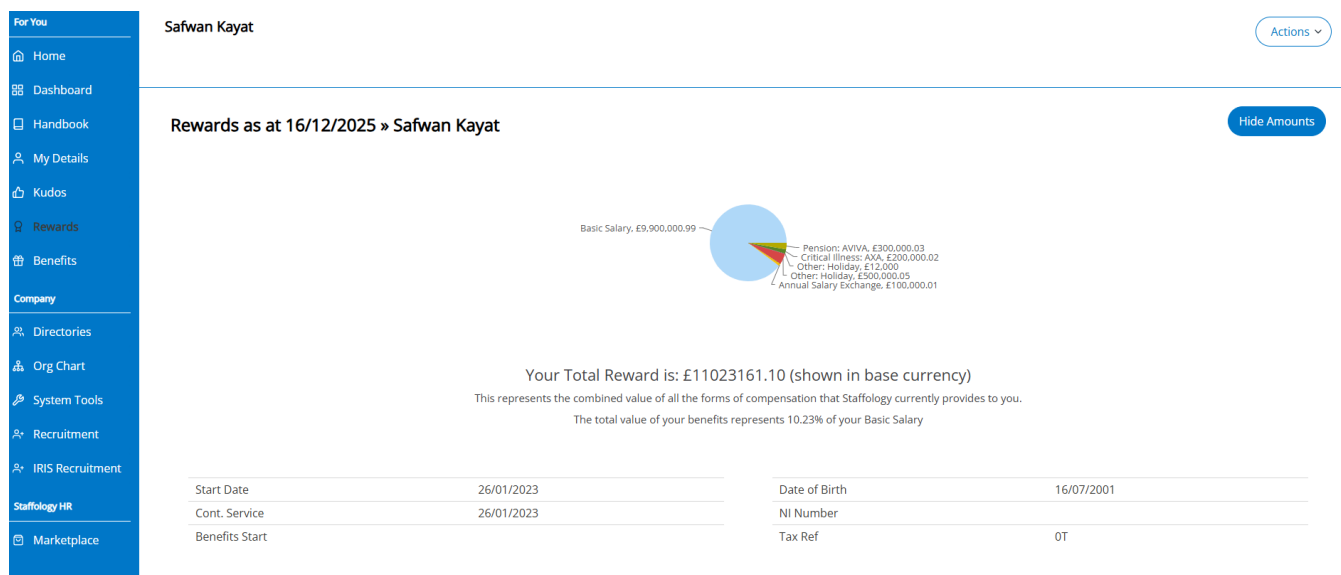
- Delivers a summary to employees outlining salary and benefits.
- Ensures transparency and consistent communication of total reward package.

Employee Benefits Tracking

- Allows HR teams to define, assign, and monitor individual employee benefits (e.g., medical cover, pensions).
- Enables clear, up-to-date visibility of each person's perks.

Salary Sacrifice Support

- Handles arrangements like pensions, cycle-to-work, childcare vouchers.



Reporting

Staffology HR by IRIS offers a powerful suite of reporting tools seamlessly integrated into its cloud-based HR platform, empowering HR teams with data-driven insights at every level. Unlock advanced reporting capabilities, enabling deeper analysis, customised dashboards, data audits, and tailored communications. For businesses requiring comprehensive oversight, it also offers fully customisable and scheduled reports, as well as report-building tools that allow you to automate, design, and deliver insights on your own terms. Whether you need quick summaries of holiday and absence trends, detailed payroll history, or bespoke reports aligned with strategic objectives, Staffology HR equips you with the visibility and flexibility needed to make informed HR decisions.

HR Bureau

Core Benefits from Staffology's HR Bureau

- Centralised Client Management - HR bureaus can add and manage multiple client accounts from a single dashboard, streamlining oversight and simplifying access to client HR systems.

- Controlled Permissions & Security - Clients can explicitly permit and revoke access to their HR data, giving them confidence that the bureau can act only within approved limits.

Company	Contract Start	Last Accessed	Band End	Head Count
Staffology Essentials	18/09/2023	04/12/2025 15:55:04	1000	105
Staffology Foundation	18/09/2023	29/10/2025 09:38:12	100	2

Staffology HR API

Our open API allows you to smoothly and effectively integrate HR data between multiple business systems.

Our APIs eliminate the need for manually importing/exporting common data between systems, which can often result in errors, inefficiency and duplication. The dedicated APIs allow you and 3rd party software vendors to integrate solutions with us, enabling the applications to share data in both directions – inbound and outbound.

The HR API has also enabled an ecosystem of complementary 3rd party HR technology products that extend the reach of Staffology into many best of breed solutions which connect seamlessly to the IRIS Staffology 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.

Information Security and Assurance

Objective of this document

The purpose of this information security assurance statement is to provide

customers of Staffology HR by IRIS with transparency as to the security and personal data compliance of this product from all threats, whether internal or external, deliberate or accidental. Also this document aims to ensure legal compliance, business continuity, minimise business damage and maximise client confidence in Staffology HR as a thoroughly secure software and service provider.

Description of the data processing carried out by Staffology HR

Staffology HR is a comprehensive cloud-based HR and payroll software solution that helps businesses of all sizes manage their employee information, payroll, and HR tasks efficiently. It provides a single platform for managing all aspects of employee lifecycle, from recruitment and onboarding to performance management and exit processes.

Statement of assurance

Staffology HR will ensure that:

1. We will put in place measures to protect customer information from a breach of security leading to accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, personal data transmitted, stored or otherwise processed;
2. We will meet our regulatory and legislative requirements.
3. We will produce, maintain and test Business continuity plans.
4. We will provide information security training to all our staff
5. We will report and investigate information incidents (whether actual or suspected), in line with our Incident reporting procedure.
6. We will monitor compliance with our Information Security Policy.

IRIS ensures that all employees comply with corporate standards and procedures. These include incident handling, information backup, system access, virus controls, passwords-authentication, communication and encryption. These policies are communicated to all employees via the company compliance portal and intranet.

Staffology HR Organisational Security

Staffology HR is part of the IRIS Software Group.

Organisational security at IRIS Group level

Data protection and information security at IRIS Software Group is controlled by the *IRIS Privacy, Security and Compliance Steering Group*. This group meets at least

quarterly and includes:

- Members of the Executive Committee
- The Chief information Officer (CIO)
- IRIS Group IT Director
- IRIS Group Data Protection Officer
- IRIS Group Compliance Manager
- Other key security leads within the company

The Privacy, Security and Compliance Steering Group approves IRIS Group level policies relating to information security and data protection, which IRIS products must comply with. There are three Group policies and a detailed Information Security Management System (ISMS). The three Group level policies are:

- [IRIS Group Data Protection Policy](#) – this sets out the roles and responsibilities for data protection compliance within the IRIS Group. It also sets out the requirement for risk assessment and data protection assessment for all projects and proposals that will change or impact on the handling or use of personal data.
- [Information Security and Acceptable Use Policy Summary](#) – this sets out the basic information security and acceptable use standards that all staff within the IRIS Group are required to adhere to.
- [IRIS Personal data incident reporting and investigation procedure](#) – this indicates the reporting and investigation procedure for all security incidents that become known or are reported to anyone within the IRIS Software Group.
- The above policies are communicated to all staff and relevant external staff within the IRIS Group at least annually, using a dedicated training and policy management platform. Managers responsible for delivering IRIS products and services are required to ensure local arrangements are in place to comply with those policies and to evidence this.
- [IRIS ISMS](#) – This is the default security system for IRIS Software Group. All IRIS products must meet or be working towards meeting the standards of the IRIS ISMS except for those which already have their own certification under ISO27001 or any other standard relating to information security and data protection.

Organisational security for Staffology HR

At Staffology HR, the product manager is the single point of contact for routine security and data protection enquiries. They work with the managers involved in

delivering Staffology HR to ensure Staffology HR complies with the IRIS Group policies and ISMS or any other information security standard – as well as any other regulatory requirements relevant to the service.

For Staffology HR, the team with responsibility for ensuring your data remains secure and in compliance with IRIS Group Policies and ISMS are:

The Staffology HR team keep your data secure by ensuring that appropriate measures are implemented to protect your data from accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to your data while being stored, transmitted or otherwise processed by or on behalf of Staffology HR.

Measures are “appropriate” if they have been identified through risk assessment.
Date of last Staffology HR risk assessment review: **October 2024**

The Staffology HR team will ensure adequate records are created and maintained to support compliance verification and inspections and incident response (subject to any limitations set out in our Terms and Conditions).

The IRIS Group Data Protection officer is responsible for providing advice and guidance to the Staffology HR team and for monitoring our compliance on all security policies and related issues. The IRIS Group Data Protection Officer is also the designated contact for the Information Commissioner’s Office.

Group IT are responsible for the operation and integrity of Staffology HR’s IT systems and for keeping systems reasonably up to date.

Staffology HR’s Development systems are managed by Local internal development teams.

Asset register: Group IT records and maintains a register of all assets, relevant to Staffology HR (including acquired software licences) in a fixed assets system.

Client defined classifications: Client information and materials processed, stored or transmitted by Staffology HR shall be handled strictly in line with the customer’s prior advised classification policies and standards, subject only to legal compliance

Staffology HR human resource security

Staffology HR staff will have access to your [customer’s] data.

Prior to employment

- Staff and contractors are subject to background checks and verifiable references to ensure suitability for any given job role.
- All staff are required to accept our Group Data Protection Policy, Incident Reporting Procedure and Information Security & Acceptable Use Policy.

During employment

The responsibility for ensuring that processes and procedures are both established and maintained are held with Staffology HR Managers. Employees, third parties and contractors are mandated to read, and sign a document to confirm understanding of their responsibilities. In the event of the use of an external party, controls are put in place to restrict the level of data they have access to in line with group policy and this activity is supervised and relevant risk assessments have taken place.

In addition to local procedure, IRIS Group also requires the completion of corporate policy training and the subsequent testing of this knowledge through the KnowBe4 portal. This testing is repeated as frequently as is reasonable for all employees, third parties and contractors.

In the unlikely event of a security breach, the governing policy or procedure would be rereviewed and amended to ensure stricter compliance moving forwards. Staffology HR places the onus on the employee for their adherence to security protocols and a disciplinary procedure is enforced for non-compliance. If no improvement is found to employee performance under the afore-mentioned discipline, employment is terminated as set out in the terms of the procedure.

Termination and change of employment

In the event of an employee terminating their employment contract with IRIS, the following departments are notified, and the following actions take place:

Department	Action
Staffology HR Management	To notify Group HR and Group IT, revoke log in credentials from internal systems required for role.
Group HR	To restrict access to internal systems, HR portal and notify Payroll.
Group IT	To close off network access, organise recovery of assets, revoke other access (Office 365 account, Cloud accounts, VPN access).

Upon instruction from HR of a person leaving Staffology HR, that person's access to confidential areas shall be restricted immediately, culminating in:

- Full removal of access to any part of the corporate network prior to departure.
- All corporate assets in that person's possession having been returned and or been collected by the relevant Department manager or the Information asset Owner as appropriate.
- In the event of a person transferring from one department to another within IRIS Software Group that person's access will be varied accordingly.

All employees have been contracted to a non-disclosure clause in their contracts that remains applicable after termination.

Staffology HR Access Control

The purpose of the Access Control Policy is to ensure that information systems resources and electronic information assets owned or managed by IRIS are available to all authorised personnel. The Policy also deals with the prevention of unauthorised access through managed controls to create a secure computing environment.

Access controls to network, operating system and applications shall be set at an appropriate level on need to use basis, which minimizes information security risks yet allows the business activities to be carried out without undue hindrance. This is managed as per the Organisational Security section in conjunction with the IT Manager and Information Asset Owner and in accordance with the IRIS Group Access Control Policy.

Access is granted on the least privileged rule on a basis consistent with an individual's job/role responsibilities. For Staffology HR user login, system enforced password complexity rules ensure that strong passwords are used and Users are responsible for keeping them confidential. Systems and information should be secured whenever left unattended.

In addition, we also offer Single Sign On (SSO) with Staffology HR for both internal and external users.

All static user equipment must be kept in good order and used responsibly; all laptops shall be subject to the IRIS Group's Acceptable usage policy. Passwords must not be disclosed to colleagues or any third parties. As set out in IRIS Group's

standard HR Policies, all personnel must maintain full conformance with company undertakings in respect of confidentiality.

Access to cloud-based administration consoles for privileged IRIS' IT Department and IRIS users is mandated with password authentication.

Server Operating System Access Control along with change and patch management shall at all times adhere to Microsoft's best practice and shall be administered by the IRIS IT team in conjunction with the Infrastructure Managers in respect of their individual department's development and support environments.

All administration systems are monitored, and audit trails produced together with email notification to the System Manager of any unauthorised attempts to access the corporate network.

Remote access to a client's network shall always be subject to client's prior written (or otherwise validated) consent or request and must be controlled either by using clients provided VPN and or remote assistance software which utilises SSL and provides a full audit trail.

For the avoidance of doubt, Staffology HR warrants to Clients that it will not seek to circumvent, compromise or change the Client's security controls, and Staffology HR will not change the Client's software configurations (without proper authorisation); and no 'back door' password or other method of remote access into Staffology HR's software shall exist.

For additional information regarding **Access Control** please visit our [help centre's security section](#)

Encryption (cryptology)

Personal data is stored in a combination of Azure Storage and Azure SQL with data encrypted at rest using 256-bit AES encryption using dedicated service-managed keys.

Refer to [Azure Storage encryption for data at rest](#) and [Transparent data encryption for SQL Database, SQL Managed Instance, and Azure Synapse Analytics](#) for more information.

All communication between client browsers and Staffology HR is protected by TLS 1.2 encryption

For additional information regarding **Processing Data** please visit our [help centre's security section](#)

For additional information regarding **Encryption** please visit our [help centre's security section](#)

Staffology HR physical and environmental security

Staffology HR follows guidance set out in our group Physical Access policy.

- Physical entry controls - Entry to the site is restricted to key fob or keypad entry. Only IRIS employees have access to the area payroll is completed in.
- Securing offices, rooms and facilities – Physical security is employed at greater levels where higher risk or classification of a more sensitive nature of data is identified.
- Protecting against external and environmental threats - Staffology HR has a robust business continuity plan, however we also place great importance on our first defence. We are protected by a failover line in the event we lose connectivity due to environmental damage, we also can move the entire site remote or transfer ownership to a satellite office at a moment's notice.

IRIS Group have invested heavily in our cyber defences, these are controlled by IRIS Group IT. We have also moved customer data into an ISO-secure cloud-based environment which adds additional layers of security to your information.

- IRIS became a paperless office in January 2020.
- Working in Secure Areas – In the event a third party needs access to a secure area within the physical site, they are always escorted by facilities. Additional measures are covered under the topic "Human Resources Security".
- Delivery and loading areas – Deliveries are taken at reception with no access granted to unauthorised people.

IRIS does not maintain physical servers or other infrastructure for Staffology HR. All infrastructure is hosted by Microsoft Azure, and as such, Staffology HR inherits the physical and environmental controls implemented by Microsoft. Details may be found on the Microsoft website.

Access to IRIS resources and equipment is subject to Group IT Policies.

For additional information regarding **Business Continuity** please visit our [help centre's security section](#)

Equipment

Equipment	Description
Equipment siting and protection	Access to critical computing resources or infrastructure is physically restricted to authorised personnel with access controlled by keys, swipe cards or a key pad lock
Protection against power failures and disruptions	The physical site has taken adequate measures to prevent disruption. Installation of a failover line in the event of loss of connectivity.
Equipment maintenance	Regular maintenance is carried out on equipment as per the recommendations of the manufacturer. A maintenance log is held on site and maintained by designated Facilities personnel.
Removal of assets	Any physical assets to be moved from one place to another place within the office and outside the office must require prior approval from Senior Management. A register of all assets taken off site is kept and maintained by the Site Leader and shared with Group IT.
Security of equipment and assets off-premises	Assets off-premises Guidance is outlined in mandatory policy document.
Group IT: Working from home manual	With considerations on Information Security, use of the Group's VPN. Two Factor Authentication is implemented for access to all secure areas of the network.
Unattended user-equipment	Staffology HR enforces a clear desk policy. Staff laptops & IT assets are sited in a secure office area, information displayed on screen may be confidential. All computers revert to screen saver mode at timely intervals and staff are mandated to logoff from sessions

Clear desk and screen policy	Since going paperless in January 2020, in line with our Clear Desk Policy, employees and contractors are made aware of their responsibilities to ensure that data is protected at all times, we also have locked shredding cabinets for the secure disposal of notepads and post-it notes, if required. All employees and contractors are expected to lock their computer screens, as a redundancy procedure, IRIS Group IT set screens to auto lock after 5 minutes and will require a password from the user to unlock.
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Media handling

Media Handling	Description
Management of removable media	Staffology HR sets out the acceptable usage of removable media in Information security and acceptable use summary Policy. It is not permitted to create a copy of protected data on unauthorised devices
Disposal of media	Staffology HR sets out responsible use of data in our IRIS Data Protection Policy, including secure disposal and audit of media

Operations security

Operations Security	Description
Documented operating procedures	Backups, transmission of information between environments and equipment maintenance are all fully managed services by suppliers listed in this document. All suppliers are independently audited against ISO 27001 standards.
Change management	Change management controls have been implemented to ensure satisfactory control of all changes. Major architectural changes are reviewed by an architecture review board (ARB) to discuss security, service level and complexity issues

Capacity management	Resources are monitored, tuned and protections made of future capacity requirements to ensure systems continue to perform at optimum levels
Separation of development, testing and operational environments	Development and production environments are separated and managed through documented and automated deployment pipelines. Access to infrastructure is restricted through IP restriction lists. Desktop payroll developers do not have access to production environments, unless authorised for a specific purpose i.e. Product Support
Protection from malware	Staffology HR utilises Kaspersky, to protect against malicious software and this is centrally monitored. All client machines are auto updated on connection to the network or via internet. Firewalls are in place. Mimecast is used to provide comprehensive email filtering (not only to preclude spam but also to scan attachments more effectively to counteract viruses and other malware).
Back-ups	Both environment and software products have independent audit logs of activities carried out within each. Environment audit is maintained and monitored at Group IT and Infrastructure level and Product is reviewed by Staffology HR Management
Protection of log information	IRIS Group IT controls clock settings, ensuring that synchronisation is enabled to a real time clock set at local standard time
Control of operational software	Installation of software on desktop payroll production systems is managed through package managers to minimise the risk of corruption of operational systems
Management of technical vulnerabilities	Penetration testing for integrated web applications is planned annually to be undertaken by a third party. Security is considered during backlog refinement and discussed as part of the overall product backlog and workload. Any changes which

	have security implications are reviewed by the Architecture Review Board.
Restrictions on software installations	Group IT regularly review acceptable use and monitor or restrict installations that have not yet been deemed safe. Requests to install new software must be authorised by Group IT if not already placed on a safe list.

For additional information regarding **Operations and Equipment** please visit our [help centre's security section](#).

Communication security

Communication Security	Description
Network security	All integrated web-applications are maintained and tested to a high standard of security. The integrity of client data is ensured through a quality hosted environment that holds more than appropriate accreditation outlined within this document
Security of network services	We employ the use of Cloud-Based Technology that houses personal data in UK Data Centres hosted by Azure, that uses world class security protocols to ensure security compliance (accreditation details in 'Organisational Security' section).
Segregation of networks	The network client data and software used to process this data are held in separate networks to mitigate risk. These networks are independent of all other business IRIS transacts and controls are in place to ensure that only authorised persons have access to these drives
Electronic messaging	IRIS employees are subject to audited training on appropriate use of electronic communication, particularly with sensitive and/or personal information. In cases where customer information needs to be shared for fault finding purposes (such as

	support / develop liaison), these are controlled through
	restricted access CRM systems requiring multi factor authentication
Confidentiality or nondisclosure agreements	As required, Staffology HR uses NDAs and maintains signed agreements to protect confidentiality. The requirements for confidentiality or non-disclosure are identified, reviewed, documented regularly by IRIS and communicated through training plans.

For additional information regarding **Communication** please visit our [help centre's security section](#)

System acquisition, development and maintenance

Securing application services on public networks - Where possible, integrated web-applications enforce the use of TLS 1.2 as a communication protocol. Security is considered during Architecture Review Board (ARB) stage for major projects; all code changes are subject to automated analysis against the OWASP top 10 and SANS top 25 lists. In addition, the codebase is scanned at least once a week by an automated vulnerability scanning tool. Any issues found during any of these stages are fixed straight away, before release. The SDLC emphasises shifting security testing left so that the master branch remains secure, stable and releasable.

Security in development and support processes

Security in Development and Support Processes	Description
System change control procedures	Major system changes are reviewed by the Architectural Review Board (ARB) mentioned previously in this document.
Technical review of applications after operating platform changes	IRIS test all product updates against a range of supported environments and software. Regression testing is completed to review the overall product impact of any system changes

Restrictions on changes to software packages	Changes to software development inhouse is subject to change control procedures.
Secure system engineering principles	Principles for engineering secure systems have been established, documented and maintained by the IRIS architecture team and are used as part of an internal training plan for all developers (Architecture Corpus)
System testing	All system and application changes are subject to an appropriate combination of manual, automated and regression testing comprised of testing suites managed by the internal quality engineers on the payroll team. All features are tested before being accepted through a series of environments before they enter the production environment
Secure development environment	The organisation has appropriately assessed the risks associated with individual system development and integration efforts that cover the entire system development lifecycle. Development environments are assessed for suitability and security by the Architectural Review Board.

For additional information regarding **System Acquisition, Development & Security** please visit our [helpcentre's security section](#)

Test data

Protection of test data - Copies of production databases are not used, and live production data is not used for testing purposes. Development, QA and staging environments have a series of stock / dummy data and manual data of fictitious companies and employees for the use of testing

Processing locations and international data transfers

On occasion, IRIS may use engineers, and third parties located in India for production environment support, deployment activities, access management and security & vulnerability management. In all these instances, information is held on secured network drives held in the UK and only accessible by those authorised to process it. All relevant security requirements have been addressed, and further

information is available on request. A full risk assessment is carried out annually to ensure that client data is always protected.

Supplementary measures for personal data processed in India

IRIS and its engineers in India adhere to the standards of ISO 27001 and uses privileged access management controls to audit activity of engineers. VPNs and Bastions are used where appropriate, and all communications are over-encrypted channels. IRIS has an international data transfer agreement in place with all sub-processors used that are based in India. This requires them to comply with IRIS data protection and security policies and standards, particularly in relation to handling requests from official sources.

Supplier relationships

Supplier service delivery management	Description
Monitoring and review of supplier services	Suppliers are independently audited by third parties against ISO 27001/9001 standards. IRIS review these audits and SOC reports annually to assess if supplier relationships meet the standards for continuation.
Managing changes to supplier services	In addition to the assessment of supplier audits, if a new supplier needs to be selected for any reason, the IRIS internal compliance team are responsible for choosing an appropriate supplier based on ISO 27001 standards. After appropriate assessment, the Group Compliance Manager is responsible for such decisions.

Summary of sub-processors

External Data Processors	Data Location	Description
Microsoft Azure Hosting UK	UK	Staffology HR Software and client data is held in a Microsoft Azure hosted environment. All security protocols and accreditations are mentioned previously within this document.
Jira Atlassian	UK	Staffology HRs development lifecycle is managed on Jira, with 4th Line Support Tickets managed via the

		support & development functions on the platform.
Amazon AWS Simple Email Service (SES) (Emails)	UK	AWS SES is a UK pinned provider of cloud-based transactional and marketing email delivery, management and analytics services. These services will consist primarily of sending and delivering e-mail communications on behalf of customers to their recipients. The personal data transferred concern anyone who is a sender, recipient or copy recipient of an email which the customer instructs AWS SES to deliver and manage. Data subjects may also include individuals who are mentioned within the body of emails sent by the customer using AWS SES. The categories of personal data transferred: • Sender, recipient and copy recipient identification information (first and last name), contact information (address, telephone number (fixed and mobile), e-mail address, fax number), employment information (job title); and • Any other personal data that the Customer chooses to include within the body of an e- mail that it sends using AWS SES. The personal data transferred to AWS SES for processing is determined and controlled by the Customer in its sole discretion. As such, AWS SES has no control over the volume and sensitivity of personal data processed through its service by the Customer. Amazon SES supports TLS 1.2, TLS 1.1 and TLS 1.0 for TLS connections. By default, Amazon SES uses opportunistic TLS. This means that Amazon SES always attempts to make a secure connection to the receiving mail server. If Amazon SES can't establish a secure connection, it sends

		the message unencrypted.
OKTA (coming in 2025)	UK	OKTA is Staffology HR & IRIS Software identity management provider and helps companies manage and secure user authentication into applications.
Salesforce	UK	Our support function uses Salesforce to provide customer ticketing, communication, live chat and query resolution management

Information security incident management

In all critical incidents (whether relating to information security or not) are managed through the “Critical Incident Management Process”, handled and coordinated by the IRIS Critical Incident Manager. Incidents are prioritised and classified as part of this process. The process outlines stakeholder communication with a focus on customer communication during an incident resolution. A post incident review is then drawn up by the software manager and /or product manager and corrective actions are logged and tracked to execution.

Information security incidents must follow this process, but in addition will be triggered by the Group Data Protection Officer. The IRIS Group Data Protection Officer will report a summary of all data protection incidents to the IRIS Information & Security Governance Group and maintain a list of learning outcomes and actions arising from incidents with the aim of ensuring Information Asset Owners follow through on those actions. This process will also be used internally for any issues discovered during development, and training is provided for staff to promote awareness of this process.

Business continuity – Information security aspects

Information Security Continuity	Description
Planning information security continuity	During adverse situations, Staffology HR have a number of secure ways to ensure the continuity work carried out.
Implementing information security	Staffology HR continues its use of the Local Data Protection Policy in the event of a BCP scenario. We also utilise the Working From Home Procedures policy and Acceptable Usage policy.
Verify, review and evaluate information security continuity	Staffology HR review all policies as often as required but no less than once per year

For additional information regarding **Business continuity** please visit our [help center's security section](#)

Compliance

Compliance	Description
Who is responsible for data protection compliance in your organisation?	All IRIS staff are responsible for compliance with data protection in line with IRIS policies and procedures. The Chief Information Officer (CIO) has ultimate responsibility for enforcement of policies and procedures and is supported by the governance structure described in Appendix 1 of the Group Data Protection Policy.
What processes do you have in place to ensure identification of and prompt reporting of data breaches to us and (if appropriate) the Information Commissioner's Office?	IRIS Software Group has an overarching critical incident process. The IRIS Personal Data Incident Reporting Procedure falls under that process to ensure any incident is promptly reported to the Group Data Protection Officer and assessed in line with the regulatory guidelines on Breach Reporting under current data protection laws. The Staffology HR Product Manager is responsible for ensuring that all staff involved in providing the service have the means to escalate incidents in line with the above corporate procedures. As your Data Processor, Staffology HR will not report personal data breaches to a regulator on your behalf. However, Staffology HR will report incidents to you without undue delay so that you can report the matter to the ICO if you believe it is necessary to do so.
Who is responsible for dealing with the response to data breaches in your organisation?	Group Data Protection Officer in consultation with the CIO.
To the extent not already set out above, what action have you taken to ensure compliance with data protection laws?	IRIS has an Information Security and Governance Group, which includes members of the Executive Committee. The Staffology HR Management Review Group leads on Staffology HR. Staffology HR has carried out a gap analysis and risk assessment in line with current data protection regulations
Do all staff receive data protection training? Please provide details.	IRIS use meta compliance to hold all Policies and procedures in relation to data protection. The compliance software tracks,

	records and enforces employees to: Read company policies Conduct assessments to record understanding Conduct e-learning activities in relation to data security, information security and managing incidents The group also provides onsite training to key areas to support this knowledge and understanding of the subject matter: Training - Training in place Confidentiality Training - Yes - Annually GDPR Training - Yes- Annually
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Data Protection – quick reference

Categories of personal data processed as part of the product/service provision (It is important to note that this does not represent all possibilities since Staffology HR can be highly configured)

- Name
- Address
- Email address
- Phone number
- Date of birth
- Race
- Gender
- Political opinions
- Religious beliefs
- Health data

Categories of data subjects under the product/service provision (It is important to note that this does not represent all possibilities since Staffology HR can be highly configured)

- Employees
- Students
- Volunteers
- Next of kin

Retention of data

In the context of our function as a data processor, we are required to keep customer data for the retention period agreed in the contract, which represents the customer's instructions to us. However, after the end of the provision of services relating to processing we must, at the choice of the customer, delete or return all the personal data to the customer and delete existing copies. It is up to the customer to ensure they instruct IRIS during any notice period of the end of the contract

Data subject rights

The Client will remain the data controller and will have the responsibility for responding to rights requests from their employees or any other data subject. Clients requiring assistance with a Data Subject Rights request can do so by logging onto a support ticket via the Staffology HRs Service Desk. A response will be received within 2 working days. Where subject matter is comprehensive or more time is required to deliver the requested data, a client will be updated with realistic timescales to satisfy their request.

For additional information regarding **GDPR** please visit our [help center's GDPR section](#)

PROJECT IMPLEMENTATION

Staffology HR Professional

Setup
Forms
Time and Expense
Training Manager

1 week between sessions so any "homework" can be completed.

End to end process should be completed 4-6 weeks. However, modules do not have to be implemented right away. Customer has 12 months to use their allotted consultancy time.

Presales

Customers can review details on the Staffology Website and arrange a meeting with one of our presales consultants who will demo the system and answer any questions.

Sales

When the customer wishes to purchase the system, they will be in contact with one of the sales consultants who will explain costs and arrange the Direct Debit Mandate to be completed. This is then passed onto SOP.

Sales Order Processing

When a sale is created, it is passed to the SOP team to check all the information is correct in our Salesforce system. Once all checks are completed a Delivery Engagement is created and this is passed to the Professional Services Team

Provisioning of Staffology System

The customer will be contacted by the Professional Services team to complete the Provisioning questionnaire which will outline the Setup of the system. This will then be assigned to an Implementation Consultant who will create the system and provide log in details. They will also create support cloud access which will allow the customer to raise support tickets if required. Once the system is provisioned the Customer will be passed to the Project Coordinators who will book in the consultancy sessions

Webinars

The Project Coordinator team will be in contact to arrange session bookings, but will also provide links to the Getting Started and Forms Webinar

The Getting Started will provide high level details of how to get started in the system. The Forms webinar will provide a guide to the forms module.

Both are a recorded Webinar which can be accessed at later dates

Data Imports

This is an additional service which can be purchased. Each data template would require its own data import session to be purchased. Eg Employees and Absences would each be a data import session.

Booking of Sessions

The Project Coordinator will then contact the customer to book in the consultation sessions. The details of each session are provided later in this document

Teams Invites

The Implementation consultant will send out Teams invites to the customer for each of the sessions at least 1 week in advance of them occurring. They will provide a course outline with each of these invites detailing what is to be covered.

Training sessions

The training sessions will be online and in a one-to-one capacity with the customer and the consultant. During the session they will access the customers system and share their screen to show sections and explain what is required. At other times the customer may be asked to share their screen and drive the system to show their knowledge and understanding.

Professional Package Training Sessions

The sessions are below. Please note that these sessions will be spread out at a pace which suits the customer and with advice from the consultant depending on the size and make up of your organisation. Where there are modules which are not

needed then the time can be repurposed, or you can save them and implement the modules in phases over the course of a year

Professional – Getting Started Recorded Webinar	2.5h
Professional – Forms Recorded Webinar	2.5h
Professional - Setup and Training Session	2.5h
Professional - Forms Module	2.5h
Professional - Training Manager Module	2.5h
Professional - Time and Expense Module	2.5h

Additional Services

Data Import services	£250	2.5h
Bespoke Training	£250	2.5h
Adhoc Consultancy / Consultancy support	£500	5h split
Adhoc Consultancy / Consultancy support	£750	10h split
Adhoc Consultancy / Consultancy support	£1000	15h split
Payroll Integration	£250	2.5h

Potential Project Plan

We advise that each session has at least a week between them as there will be additional work which the customer requires to complete between sessions. This should allow enough time for that to happen.

The sessions can be replanned to suit the customer, but Setup must happen first, and Rota is required before Time as they link together

If a module is not required, the consultancy time can be banked for a year from the start of implementation and can be repurposed for refresher training on other modules.



Implementation Complete

Once the implementation is complete the customer will be fully handed over to our support team. Should they have any problems with their system they can log a ticket, and a support consultant will contact the customer to resolve.

Training after Implementation or Changes to Account

If the customer wants to make changes to their Licence numbers or account level, they can contact their account manager. If they wish to purchase additional training for after implementation, perhaps they have new employees who need training, again they should contact their Account Manager to purchase this time.

Staffology HR Ultimate

- Setup x 3
- Forms
- Time and Expense
- Training Manager
- Rota
- Performance Management
- Recruitment

1 week between sessions so any "homework" can be completed.

End to end process should be completed 12-16 weeks. However, modules do not have to be implemented right away. Customer has 12 months to use their allotted consultancy time.

Sessions are completed on MS Teams with a consultant, and the customer would be sharing their screen so we can guide them around the system. The focus is always on training the client, rather than doing things for them as there is less learning when this method is used.

Presales

Customers can review details on the Staffology Website and arrange a meeting with one of our presales consultants who will demo the system and answer any questions

Sales

When the customer wishes to purchase the system, they will be in contact with one of the sales consultants who will explain costs and arrange the Direct Debit Mandate to be completed. This is then passed onto SOP.

Sales Order Processing

When a sale is created, it is passed to the SOP team to check all the information is correct in our Salesforce system. Once all checks are completed a Delivery Engagement is created and this is passed to the Professional Services Team

Provisioning of Staffology System

The customer will be contacted by the Professional Services team to complete the Provisioning questionnaire which will outline the Setup of the system. This will then be assigned to an Implementation Consultant who will create the system and provide log in details. They will also create support cloud access which will allow the customer to raise support tickets if required. Once the system is provisioned the Customer will be passed to the Project Coordinators who will book in the consultancy sessions

Webinars

The Project Coordinator team will be in contact to arrange session bookings, but will also provide links to the Getting Started and Forms Webinar. The Getting Started will provide high level details of how to get started in the system. The Forms webinar will provide a guide to the forms module. Both are a recorded Webinar which can be accessed at later dates

Data Imports

This is an additional service which can be purchased. Each data template would require its own data import session to be purchased. Eg Employees and Absences would each be a data import session

Booking of Sessions

The Project Coordinator will then contact the customer to book in the consultation sessions. HCMProjects@iris.co.uk please email this address to book in any sessions you require after your initial setup sessions

Teams Invites

The Implementation consultant will send out Teams invites to the customer for each of the sessions at least 1 week in advance of them occurring. They will provide a course outline with each of these invites detailing what is to be covered.

Training sessions

The training sessions will be online and in a one to one capacity with the customer and the consultant. During the session they will access the customers system and share their screen to show sections and explain what is required. At other times the customer may be asked to share their screen and drive the system to show their knowledge and understanding.

Ultimate Package Training Sessions

The sessions are below. Please note that these sessions will be spread out at a pace which suits the customer and with advice from the consultant depending on the size and make up of your organisation. Where there are modules which are not needed then the time can be repurposed, or you can save them and implement the modules in phases over the course of a year

Ultimate – Getting Started Recorded Webinar

Ultimate – Forms Recorded Webinar

Ultimate - Setup and Training Session 1

Ultimate - Setup and Training Session 2

Ultimate - Setup and Training Session 3

Ultimate - Forms Module

Ultimate - Training Manager Module

Ultimate - Time and Expense Module

Ultimate - Perform Module

Ultimate - Recruitment Module

Ultimate - Rota Module

Ultimate – Ad Hoc Queries

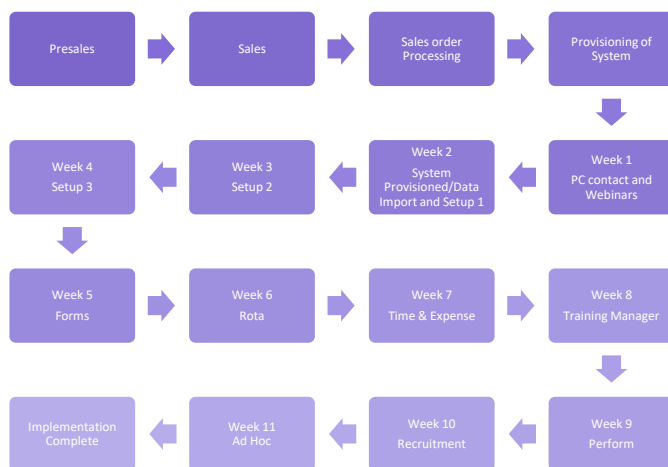
Additional Services

Data Import services	1 session
Bespoke Training	1 session
Adhoc Consultancy / Consultancy support	2 sessions
Adhoc Consultancy / Consultancy support	4 sessions
Adhoc Consultancy / Consultancy support	6 sessions
Payroll Integration	1 session

Potential Project Plan

We advise that each session has at least a week between them as there will be additional work which the customer requires to complete between sessions. This should allow enough time for that to happen.

The sessions can be replanned to suit the customer, but Setup must happen first. If a module is not required, the consultancy time can be banked for a year from the start of implementation and can be repurposed for refresher training on other modules.



Implementation Complete

Once the implementation is complete the customer will be fully handed over to our support team. Should they have any problems with their system they can log a ticket, and a support consultant will contact the customer to resolve.

Training after Implementation or Changes to Account

If the customer wants to make changes to their Licence numbers or account level, they can contact their account manager. If they wish to purchase additional training for after implementation, perhaps they have new employees who need training, again they should contact their Account Manager to purchase this time.

ONGOING SUPPORT

Service Level Agreements (SLA's)

This is not a legal document; the scope of this document is to guide customers on how their engagement with IRIS Service will work. Target response and resolution times quoted here may vary from some customer contracts.

Staffology HR Help Center https://help.staffology.co.uk/hr	IRIS Community Help Center https://help.iris.co.uk/servicecommunity
IRIS Service Community https://www.iris.co.uk/iriscommunity	IRIS Service Community - Forgotten password https://www.iris.co.uk/communityforgotpassword

How do I initiate support?

We currently have three support channels available to you.

- [Telephone](#)
- Chat
- [Case creation via community](#)
- [Knowledge Base](#)

What hours are support available?

Our online Knowledge Base and Customer Service Community are available 24/7. Chat and Telephone support channels are available during our standard support hours of 9am to 5.30pm Monday to Friday, excluding Public Holidays.

What target response and resolution timescales should I expect?

P1. Response = 30 mins, Resolve = 4.5 hours

P2. Response = 60 mins, Resolve = 8 hours

P3. Response = 4.5 hours, Resolve = 6.2 days

P4. Response = 8 hours, Resolve = To be advised

Our SLA clock is paused when we are waiting for a customer response. e.g., Case status = On Hold. You can see the [case status](#) in the community.

How do I know what priority to assign to my case?

You should assess your case against the following criteria and select what you believe is the right priority.

Prioritisation Definitions

- P1. System unusable, critical impact on business operations
- P2. Serious issue preventing key operations; time sensitive issue
- P3. Key operations are impaired; no known workaround
- P4. Operations are impaired but can be worked around
- P5. Cosmetic issue

What will happen if I assign the wrong priority to my case?

The reason for assigning a priority against a case is so that our customers receive the right level of support. We need to be able to quickly identify urgent issues preventing essential business operations, over those where the impact is minimal. If, and when necessary, the support team will adjust the priority assigned to the case and you will receive an email notification advising you.

If you feel the new priority assigned is incorrect, then please contact us with the information we need to select the correct priority. We can only work with the information supplied.

Why can't I raise a P1 from the Customer Service community portal?

A P1 should only be used if your system is unusable which has a critical impact on your business. In this instance the advice is to raise a Live Chat to ensure you are connected to an agent in real time.

This ensures we can perform an immediate impact assessment and capture all the relevant technical information by the agent live, this will ensure your case is escalated through the Support team for the quickest resolution.

It should provide clarity and reassurance back to the customer that we have the required detail, know about your issue and are dealing with it. You can track the status of your case via Community (once logged by the Support agent).

If a P1 case was raised through Community it may not include everything we need to know, possibly introducing an unwanted delay to the resolution.

To gain access to the customer system, IRIS Cascade Service Desk will first contact the customer Helpdesk or main contact for permission so that the connection can be enabled.

During such access the customer reserves the right to monitor IRIS Cascade Service Desk activities to ensure that we adhere to any data handling processes the customer may have in place.



Thank you

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