



The HR Manager's Complete Guide to Purchasing HR Software

Choosing the perfect HR system for your business



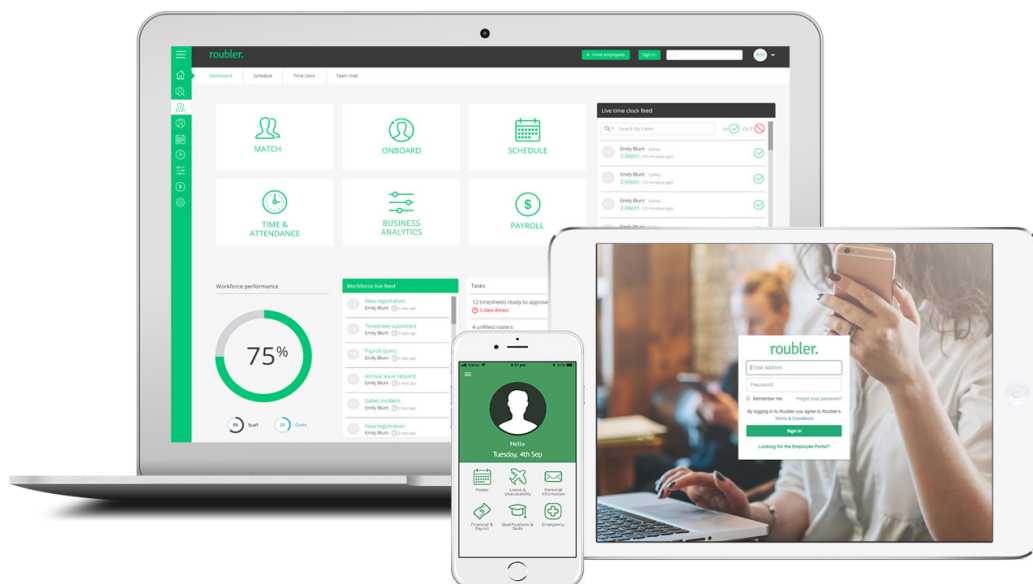
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Contents

| | |
|---------------------------------|----|
| Introduction | 4 |
| STEP 1: Define your needs | 7 |
| STEP 2: Explore your options | 12 |
| STEP 3: Evaluate your shortlist | 15 |
| STEP 4: Choose the best option | 16 |
| About Roubler | 18 |



Introduction

It's no secret that businesses are facing tremendous challenges in managing their workforce with changing market demands and regular updates to industrial relations legislation. This increased complexity means that resources for administrative work are stretched to their limits, and businesses are rapidly seeking better tools to help them complete day-to-day HR tasks efficiently. Long gone are the days where a modest spreadsheet could handle all your HR needs!

Furthermore, time-consuming and manual administrative procedures are draining resources that could be better directed into more strategic efforts such as talent management and employee engagement. Critical areas which are being left behind to the detriment of the business's growth.

But these aren't the only challenges HR managers and business owners face.

Challenges

Challenge 1: A lack of devoted HR resources

In small to medium sized businesses, it's common for all HR tasks to fall to a single HR Manager or one employee who may have other responsibilities. That means there is only one person managing recruitment, onboarding, record-keeping, time and attendance, performance management, and payroll. In addition, a solo HR manager will need to be across each legislative change: a particularly crucial task given the harsh fines levied for non-compliance. It's easy to see how tasks such as talent planning and employee engagement get pushed to the bottom of the agenda.

Challenge 2: Managing manual data entry and outdated systems

With industrial relations legislation being tightened each year, it's never been more important to ensure your business' data management is up to the mark.

Workplaces that are still relying on manual data entry, data transfers, low level APIs and multiple outdated systems to manage payroll, leave, time and attendance and employee details frequently encounter errors and easy-to-make mistakes. Even small errors can be costly in terms of rectifying payroll errors, fines for failing to deliver the correct employee entitlements, or data mis-management.

Challenge 3: Payroll legislation & Modern Award compliance

Every year, hundreds of businesses receive fines for not operating their business in compliance with regulations. It's all too easy to make a small mistake that can result in a not-so-small fine, and you may not even realise that you are in error.

We've put together a quick questionnaire below to help you determine if your business is at risk of non-compliance fines.

If you cannot answer 'yes' to all of the following questions with 100 per cent certainty, it's imperative you take steps to rectify this ASAP!

Quiz – Is your payroll compliant?

| | |
|---------------|---|
| YES/NO | Contracts: Have the Employment Agreements you have with your staff been updated to reflect recent legislative changes? You should have reviewed them in the past year. |
| YES/NO | National Employment Standards: Are you 100% sure that the payrate, leave allowance, and other workplace conditions of your employees align with the minimum standards of employment? |
| YES/NO | In-house policies: Do all staff members know your business's health, safety and employment policies? Do you have records to verify that they have read them? |
| YES/NO | T&A: Do you have detailed, updated records of wages paid, and hours worked for all employees, past and present? |
| YES/NO | Single Touch Payroll: Has your business updated their processes to reflect new Single Touch Payroll reporting requirements? |
| YES/NO | Award Compliance: Are you across all legislative changes to the Modern Awards including the Vulnerable Workers Bill? Are you regularly auditing your systems to ensure all wages are being paid in accordance with the relevant Awards? |

The solution? HR Technology

Thankfully, all the challenges listed above can be addressed with the right software.

HR technology has progressed rapidly in the past few years and there are now dozens of software products that can help you manage all manner of workforce management tasks from recruitment to payroll and employee wellbeing.

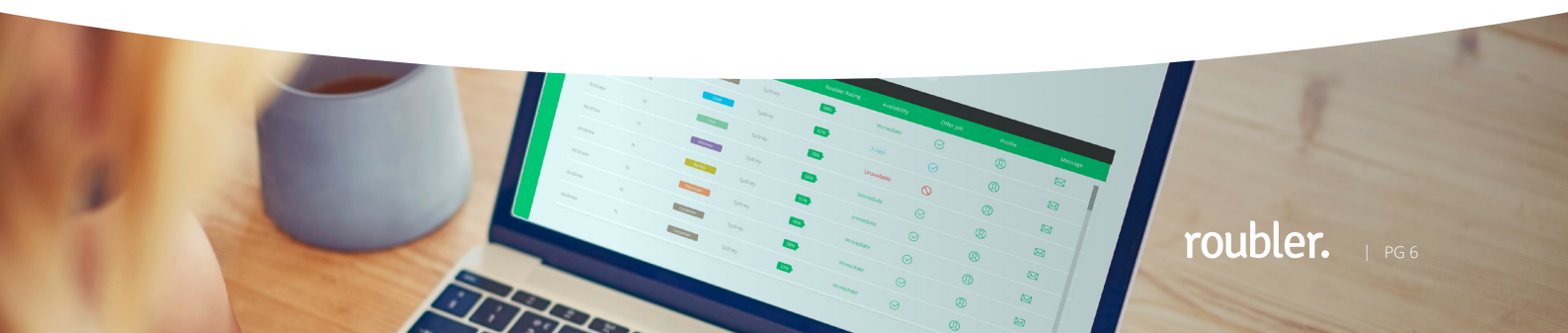
How do you pick the perfect system?

Each company has different needs, so it's essential that you select a solution that suits your unique situation. That said, you will need a system that's easy to implement in your environment, will work together with any existing software you need to retain, and won't disrupt business-as-usual!

The very best HR software should do all of the following:

- Automate manual tasks to minimise your administrative workload.
- Allow staff to manage their own details, schedules and leave via an employee self service function.
- Reduce human errors from data entry
- Ensure you are automatically compliant with modern awards with in-built calculators and interpretation software.
- Instantly provide data and metrics on staff attendance, payroll and wage forecasting
- Streamline all in-house communication of schedules or rosters, shift updates and leave approvals.
- Provide easy access to important company and team documents.
- Maintain the highest levels of safety and security for your data.

In this guide, we will walk you through four steps for choosing the perfect HR technology solution for your business that will help you address your most pressing challenges, drive workforce efficiency and increase profitability.



STEP 1: Define your needs

This first step is the foundation for each step going forward. It's crucial that you set aside some time to detail exactly what you need from your new HR software so that you know what to search for and can easily compare your options further down the track.

Our tips for this step

Maintain a Future focus

When you're thinking about what you need from your new software, it's important to not only consider what your business needs right now, but what it will need in the future. For example, if you currently operate out of one location, but are planning to open in two new locations over the next two years, you'll need to ensure your software can handle multi-site operations.

Write down a definitive list of what you think you're after. Pass it around the managers and stakeholders in your business to ensure they agree with what you've decided.

Consult with key stakeholders

In small organisations, it's likely that only one or two people will be involved in the selection process so very little consultation needs to happen. However, in large organisations it's unlikely one person will be able to comprehensively define the organisation's needs, so we recommend that this exercise is done in a group with key management staff.

Where an employee self service feature is required, you may wish to speak to employees to find out what issues they are having with the current system and what they would like to see in the new system.

Evaluate your current system

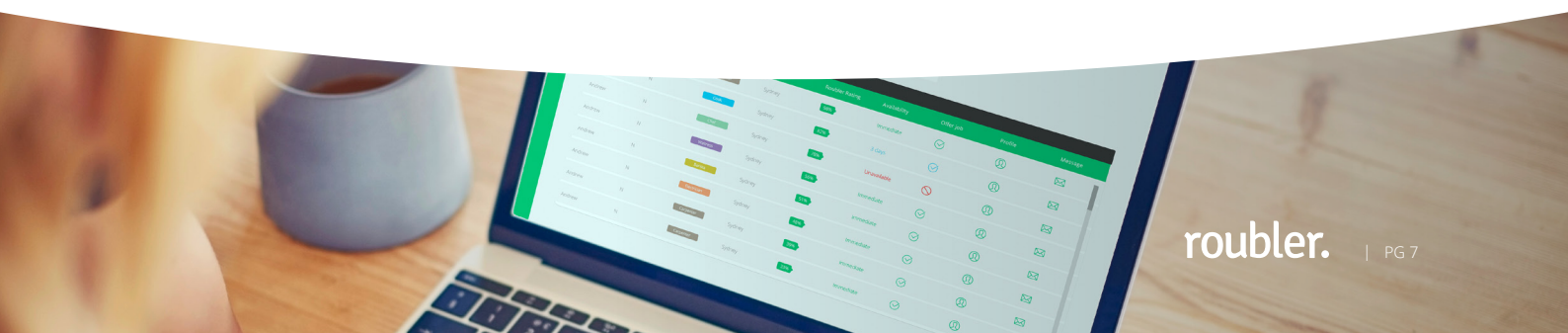
At this stage in the process it's a good idea to take stock of what you have, what works and what doesn't.

- List of your current systems(s) features in two columns:
 1. Features you use (functions and features you'll need going forward)
 2. Features you don't use
- Write down your current system's limitations and drawbacks.

Define your problems and goals

To help you decide exactly what you need, you'll need to answer the following questions:

- What problems do you need the new software to solve? These will be related to the limitations of your current system.
- How do you wish to improve your workforce management functions?
- What HR and business goals could you meet with a new system?
- Who will be using the system? What tasks do they need to complete?



It's important that the solution you choose works across all levels of the organisation.

- Where will they be using it? In an office or on a laptop in a store or warehouse?

Understand what type of platform and provider you need

There are several different types of HR platforms and providers which all are very different but often do very similar things.

Partnership providers

Partnership providers don't provide a full service on their own. They link up with other providers in order to give you everything you need. The downsides are:

1. There is no single IT support provider to contact when problems arise.
2. Having multiple applications makes synthesizing information difficult and inefficient.
3. Software updates and data synchronisation can be slow and disjointed.

Acquisition providers

Acquisition providers may have all the software you need but they have bought rather than developed the programmes on their own. You may find the applications don't run well together as they weren't built to be cohesive.

Single-application providers

Single-application providers develop all features/ programs to work together as one platform. They are also able to offer a single source of IT support. Companies like Roubler intentionally integrate each feature within the system, from hiring to onboarding, time and attendance, leave management and payroll to avoid data loss and inefficient data transfers.

Create a features list

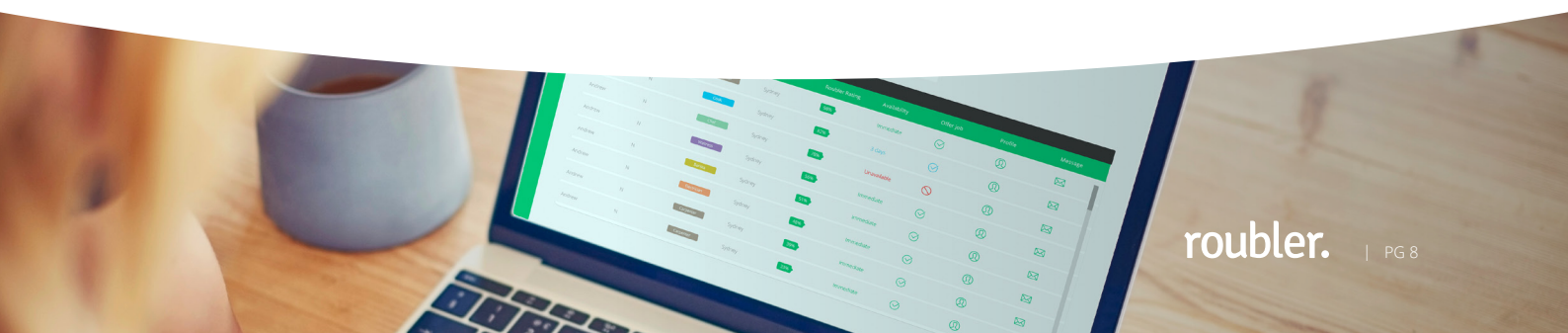
We recommend creating a chart that categorises the necessity of each of the features you need into three levels:

- **Necessary features:** features you will definitely require.
- **Helpful features:** features that aren't mission-critical but would be useful.
- **Extra features:** features that are just that extra bit fancy and helpful!

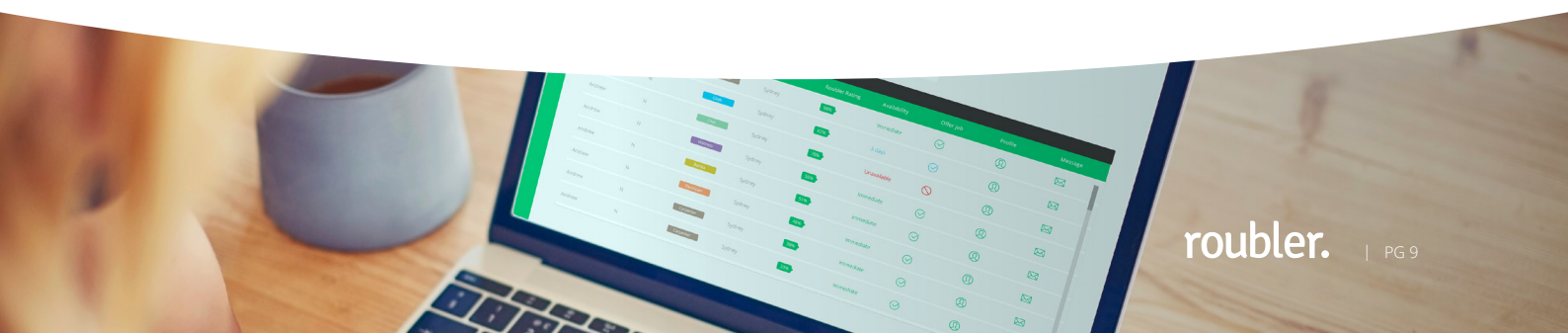
This list can also include your IT and security requirements.

Features list

On the next page we've provided a template to help you with this step.



| FEATURES LIST | Name/Description |
|--|-------------------------|
| Necessary Features | |
| Features you must have (mission-critical) | |
| Feature #1 | |
| Feature #2 | |
| Feature #3 | |
| Feature #4 | |
| Feature #5 | |
| | |
| Helpful Features | |
| Features that will greatly improve your business | |
| Feature #1 | |
| Feature #2 | |
| Feature #3 | |
| Feature #4 | |
| Feature #5 | |
| | |
| Extra Features | |
| Features that are nice-to-have but not necessary | |
| Feature #1 | |
| Feature #2 | |
| Feature #3 | |
| Feature #4 | |
| Feature #5 | |
| | |
| IT & Security Requirements | |
| Requirement #1 | |
| Requirement #2 | |
| Requirement #3 | |



Roubler's features

To help you with building a features list, we've compiled a list of features included in Roubler's workforce management software.

Recruitment (via Scout Talent or Workable)

- Customised careers page
- Job posting to multiple job boards
- Applicant tracking
- Applicant screening and assessment
- Talent pool management
- Candidate engagement and communication

Employee Onboarding

- Branded or non-branded interface
- Paperless onboarding
- Customised onboarding workflow
- Employee profile set up
- Online TFN declaration (Australia Only)
- Payroll set up
- Contract and document upload and e-signing ability
- Mobile friendly interface

Scheduling/Rostering

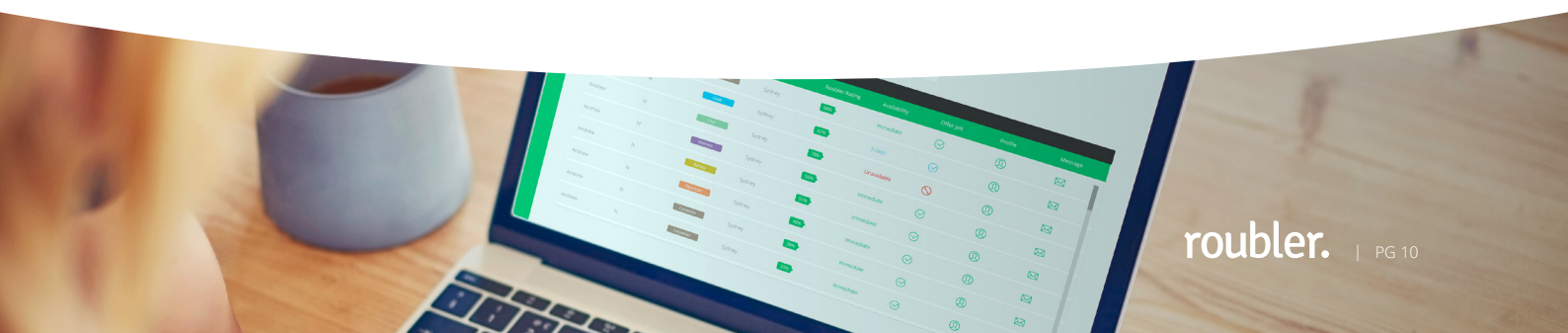
- Multi-site management and visibility
- Award and Fair Work compliance (Australia Only)
- Publish / unpublish schedule function
- Labour cost forecasting
- Mobile app communication of schedule to employees
- Auto-fill rostering capability
- Leave and unavailability alerts

Time and Attendance

- Real-time attendance data
- In-house tablet for real-time clocking in/out
- Desktop time clock application
- Online timesheets
- Approval management
- Audit reporting
- Rounding rule settings
- Break management
- Cost centre allocation
- Timesheet award costings (Australia only)
- Split-shift management
- Integration with payroll

Leave Management

- Mobile app or web leave applications
- Easy approval / request management
- Leave balance management
- Recurring unavailability management
- Scheduling assistance
- Integration with payroll



Employee Self Service

- Mobile app and web portal
- Employee profile management
- Leave and unavailability requests
- Recurring unavailability management
- Leave balances and leave history
- Pay history and pay slips
- Shift notifications and work schedules/rosters
- Shift swapping
- Document library

Document Library

- Uploading and storage of company documents
- Document distribution via email or push notification with a link
- Visibility controls for confidentiality
- Upload and document modification authority settings

Employee Profile Management

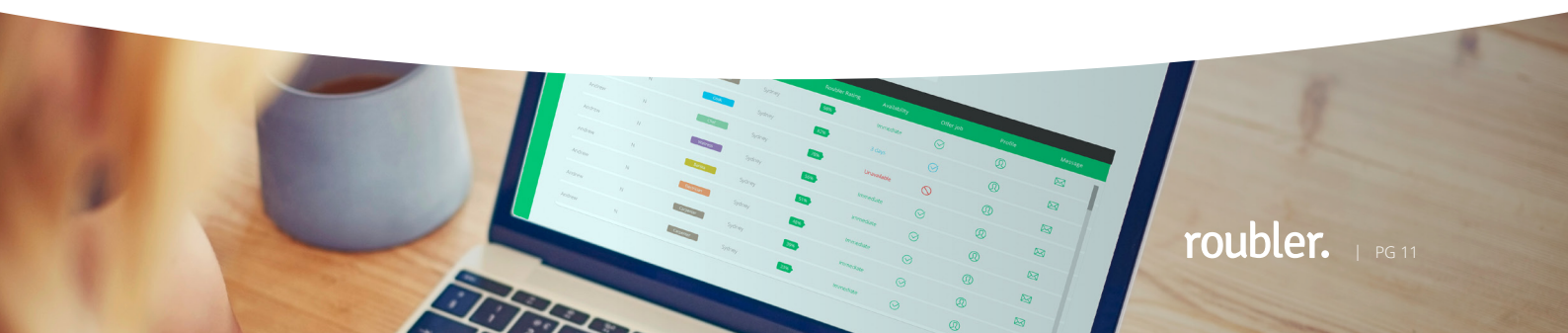
- Personal information
- Tax and payroll information
- Skills and qualifications record
- Documents and notes storage
- Rosters and schedules
- Leave history and balances

Payroll Software

- Data flow from T&A
- Single touch payroll compliance
- 40 + award Interpretations
- Leave / Time in lieu management
- Superannuation payments and clearing house
- Pay slip management
- Payroll tax compliance assured
- Accounting package integrations
- Journal creation capability
- Payroll reporting

E-Learning Management System (via GO1)

- Custom course creation
- Assessments and quiz creation tool
- Course completions and results tracking
- Off-the-shelf courses
- Customisable learning portal



STEP 2: Explore your options

Now that you know exactly what your business needs from a new HR software system, it's time to research what's on the market.

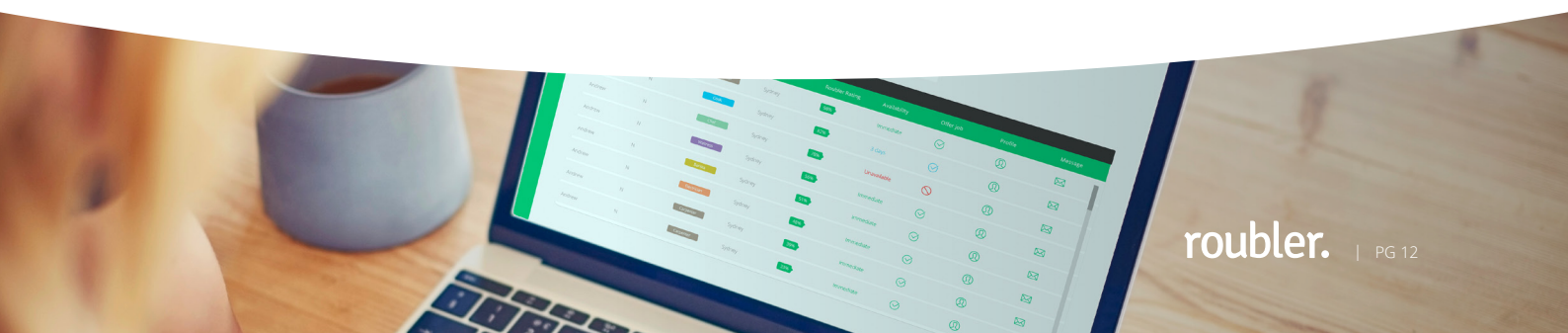
There are two ways to research your options:

1. Asking for recommendations from peers in your industry or from colleagues who have used different systems in the past.
2. Searching online. An initial online search will give you a solid indication of the vendors applicable to you. Make sure the options you're examining are available in your location!

For the best comparison, you should thoroughly consider at least three vendors. Compare each against the list you created in step one.

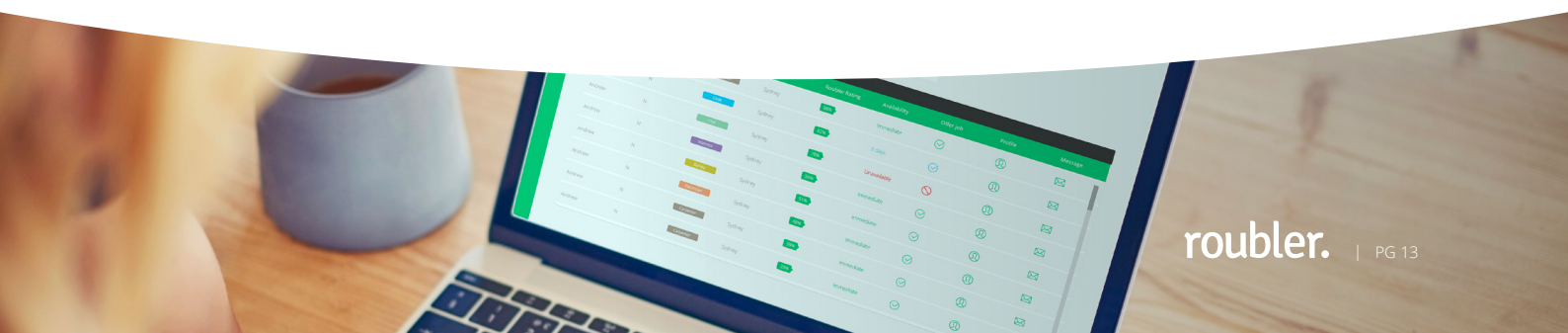
To help you narrow down your options going forward, create a comparison chart using the features you identified in Step 1. We have pre-filled in a simple comparison chart, marking off some of the features Roubler offers.

Fill out your chart as you examine each potential software option and use either a tick or score out of five to track how effective each option would be for your business.



Software provider comparison chart

| FEATURE | Roubler | Option 2 | Option 3 |
|---|---------|----------|----------|
| TALENT RECRUITMENT & MANAGEMENT | | | |
| Automated job advertisements | ✓ | | |
| Integrated careers page | ✓ | | |
| Job board posting access | ✓ | | |
| Applicant skills & attributes assessment | ✓ | | |
| Instant & rated shortlist | ✓ | | |
| ONBOARDING | | | |
| Paperless onboarding system | ✓ | | |
| Payroll and Tax information set up | ✓ | | |
| Customisable onboarding tools | ✓ | | |
| SCHEDULING | | | |
| Auto-rostering | ✓ | | |
| Multi-site scheduling | ✓ | | |
| Live labour forecasting | ✓ | | |
| Employee access to roster-off | ✓ | | |
| TIME & ATTENDANCE | | | |
| Inbuilt time-clock | ✓ | | |
| Automatic calculation of overtime, leave, and super | ✓ | | |
| Live T&A feed | ✓ | | |
| BUSINESS INTELLIGENCE | | | |
| Payroll and employee data reports | ✓ | | |
| Real-time metrics | ✓ | | |



PAYROLL

| | | | |
|--|---|--|--|
| Instant data flow from Time & Attendance feature | ✓ | | |
| Complete Modern Award Compliance | ✓ | | |
| Single Touch Payroll reporting implemented | ✓ | | |
| Managed Payroll Service Option | ✓ | | |

INTERGRATION

| | | | |
|--|---|--|--|
| Third-party software integration ability – POS, Accounting | ✓ | | |
|--|---|--|--|

TECHNOLOGY & SECURITY

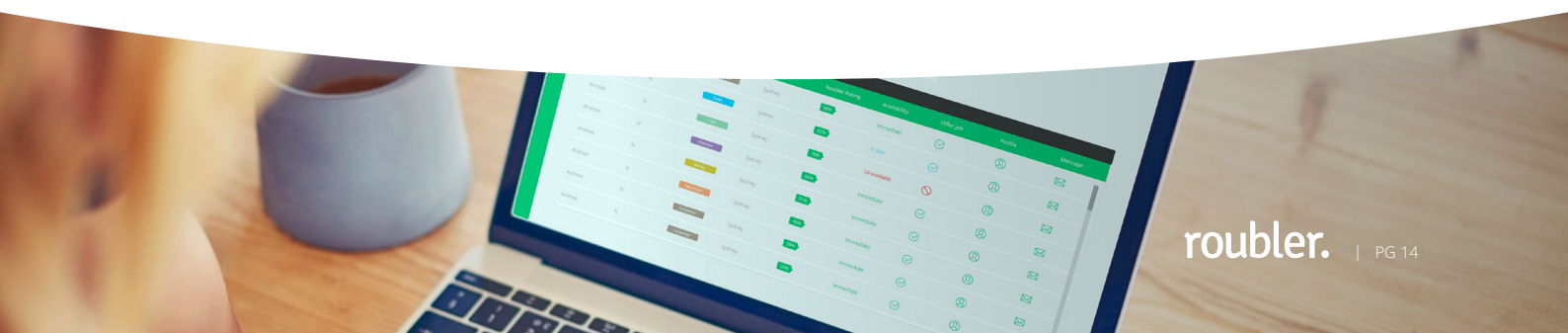
| | | | |
|---|---|--|--|
| All-in-one capability | ✓ | | |
| Cloud-based | ✓ | | |
| Amazon Web Cloud Hosting & Auth0 security | ✓ | | |

SERVICE AND SUPPORT

| | | | |
|--|---|--|--|
| Online support | ✓ | | |
| Dedicated Customer Success Manager - Onshore | ✓ | | |
| Managed implementation process | ✓ | | |

EMPLOYEE SELF SERVICE

| | | | |
|-----------------|---|--|--|
| Mobile app | ✓ | | |
| Instant updates | ✓ | | |



STEP 3: Evaluate your shortlist

Once you're comfortable with one or two options, it's time to check their 'resume'. You can go about this in a few ways.

Free trials

Many platforms offer a free trial you can access yourself or may be happy to organise a free trial for you. Take complete advantage of the trial – really play around with it and get a feel for the software. Is it easy to use? It is quick and efficient? Ensure other key members of staff get to take the platform for a test run, too.

Book a demonstration

Free trials are very useful, but it's easy to miss features and functions. A demonstration will give you a far more in-depth tour of the product and allow you to ask any questions you need to help you determine how suitable the product is for your business.

Customer testimonials

To make an informed choice you really need to get the opinions and advice of those who are already using the system. Most reliable HR software providers list customer testimonials on their site. Customer testimonials are written or video reviews by customers who use the platform, and would endorse it for use by other businesses. Often, they'll mention specific reasons the platform was the best choice for their business. Listen to see if that aligns with your reasoning.

Contact customers

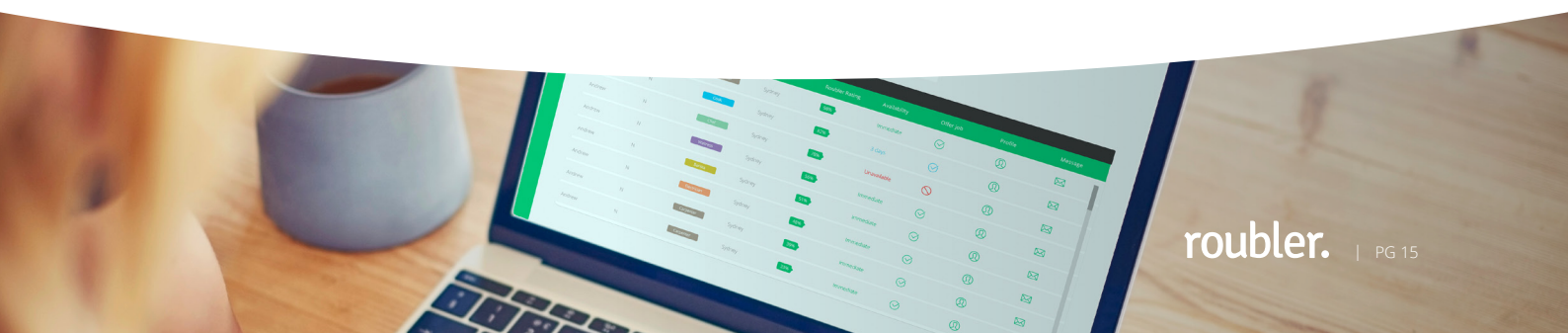
You can get in contact with other companies that use the platform. You could contact businesses who are featured on customer testimonials, or client lists on the platform's site.

Some questions you could ask them are:

- Did you consider any other platforms?
- If so, why did you choose this one?
- How was the implementation process?
- How is the support service?
- Would you recommend the software?

HR software review sites

There is a plethora of sites dedicated to reviewing HR software. These reviews may be provided by technology experts or other HR experts. Remember to keep in mind your specific needs as they may not be the same for other businesses.



STEP 4: Choose the best option

A new HR software system is an enormous investment for your business, in terms of time, money and human resources – so don't rush your decision.

Ask final questions

Even with all the information you have gathered during Steps 2 and 3, it's still worthwhile sitting down with the software company's representative to discuss any questions or issues you have to ensure you are completely comfortable with your decision.

A major factor in your decision will be costs, so ensure you are comfortable with their terms and that you can scale up your subscription as your employee numbers increase.

Questions you should ask before signing on the dotted line:

Security & Data

- Are you ISO 27001 certified?
- Has your software always been in the cloud? If not when did you switch?
- How secure is our data? Can you provide evidence of security for data storage?

Implementation

- How long with the implementation process take?
- Who is involved in the implementation process? What will their responsibility be?
- Can you migrate pre-existing data into the system?

- Who sets up the integrations with the existing systems we want to keep using?

Training

- Will you provide training for our staff?
- Does training require additional costs?
- Can training be conducted in-house?
- Do you offer online training?
- Do you offer a knowledge centre or FAQ centre for troubleshooting?

Support

- What ongoing technical support do you offer?
- How do staff access support?

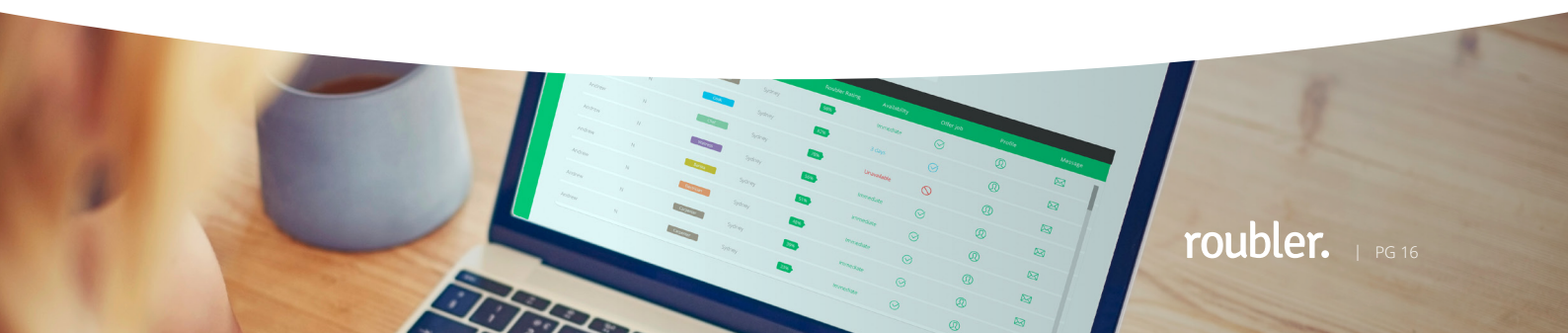
Ongoing development

- How often do software upgrades happen?
- Are upgrades instant or do they incur downtime?

Compliance

- Do you participate in audits?
- How can you assure me that the rostering, time and attendance and payroll features are compliant with current laws?

We have answered many questions on our FAQ pages (www.roubler.com/faq/) and our Getting started page (www.roubler.com/getting-started/). In addition to valuable information, these pages offer examples of questions you may wish to ask other software providers.



Prepare a business case for approval

This may not be necessary in small business situations; however, it is good practice to develop a business case to outline to stakeholders and the board why the option you have chosen is the best solution for your business. This can be a short, two-page document with information placed under the following headings:

- Business need (the challenges you are facing)
- Product overview (essentially a list of features and key benefits)
- Technology and security
- Implementation
- Support
- Cost
- The case for purchasing [Software Name]

You can download a business case for Roubler from our website at www.roubler.com/au/why-change-hr-systems/

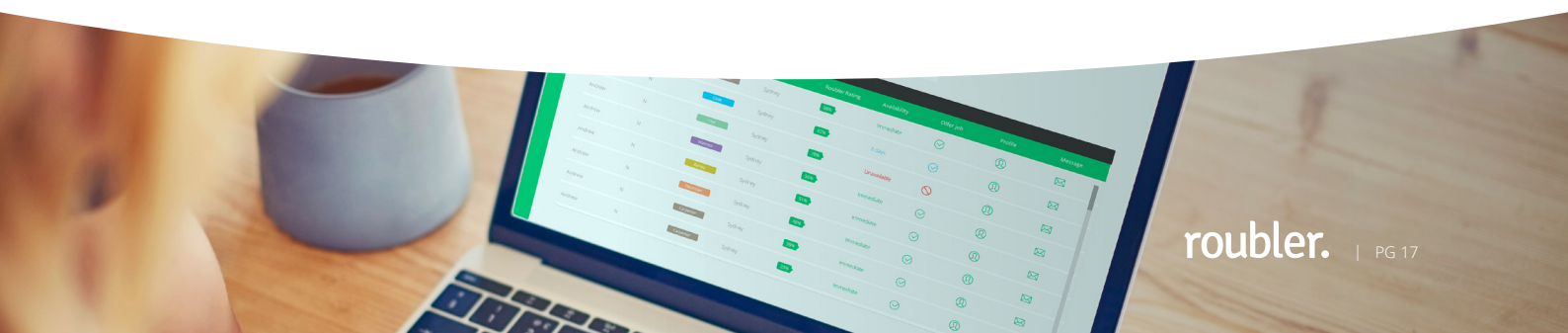
The hard part is over! You've considered all the nuances of your business and researched far and wide to find yourself the best HR software possible.

Implement your new HR software

All that's left to do is implement your new system and reap the rewards! With all the time you'll save and the increased productivity and efficiency, you can now focus on growing your business.

You may find the following resources handy during the implementation phase:

- Blog: 5 ways to help your employees adopt new HR technology www.roubler.com/help-employees-adopt-new-hr-technology/
- Guide: Helping Employees Adopt New HR Technology www.roubler.com/ebooks-guides/help-employees-adopt-new-hr-technology
- Blog: Best practice when implementing payroll software www.roubler.com/au/implementing-payroll-software/



About Roubler

Welcome to the future of workforce management. Our all-in-one HR and Payroll software consolidates multiple workforce management functions into one easy to use, cloud-based system.

All Roubler features are connected by a single data source enabling you to manage employee information and HR tasks across the entire employee lifecycle on one platform.

The information you need to onboard employees, create rosters, approve and manage leave and run payroll is always up to date and ready to access wherever and whenever you need it.

“

“My staff are very important to me, so I want to make sure that our business is compliant when it comes to the awards system. Roubler offers me that comfort.”

– Kate Williams, Founder, Nodo Donuts

”

“

“All the clients that we’ve introduced to Roubler have experienced tremendous benefits, and greater profitability as a result of this”

– Matthew Ashely, Business Advisory & Outsourcing Partner, Mazards

”

“

“I was very comfortable knowing that Roubler had a large amount of experience behind them and strong foundations.”

– Sam Elderfield, Managing Director, Johnny Rockets

”

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hire. roster. manage. pay.



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