**Annex 3:** InnoEnergy criteria list

Company name:

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| --- | --- | --- | --- | --- | --- |
| **Category** | **Code** | **Criteria** | **PLEASE USE THE DROP DOWN LIST (CHOOSE AND ITEM TO MAKE A CHOICE HERE)** | **Comments field by tenderer** | **Score (TO BE COMPLETED BY INNOENERGY)**  **0-10** |
| **SECTION 1: GENERIC REQUIRMENTS**  **PLEASE NOTE THAT THESE REQUIREMENTS ARE GENERIC AS THEY APPLY TO ALL 3 type of systems we require (Holidays TIMEWRITING AND HR)** | 1A | *InnoEnergy wishes to put in place a system for HR, Time writing, holiday/leave and sick leave administration (see section 3 for details),*  *As InnoEnergy is a company that operates in 8 countries all systems need to work in the following countries with the following staff numbers:*   |  |  |  | | --- | --- | --- | | *Country* | *Staff* | *Interns for 3-6 month per year* | | *Portugal* | *10* | *2* | | *Spain* | *50* | *30* | | *Netherlands* | *45* | *4* | | *Belgium* | *25* | *4* | | *France* | *25* | *4* | | *Germany* | *25* | *4* | | *Poland* | *40* | *10* | | *Sweden* | *45* | *10* | | *TOTAL* | *265* | *68* | | *GRAND TOTAL* | *333* | |     What we need to know from you is:  Are you able to operate these systems for all 8 countries (please answer each question):   1. According to local legislation? 2. providing input for monthly Payroll data mutations, 3. Fully local legally compliant time-writing and recording, Holiday and Absence Management? 4. Provide a view for each country consolidating the numbers (staff, FTE, costs, holidays, etc). 5. Provide ONE consolidated view for the entire company consolidating the numbers (staff, FTE, costs, holidays, etc). | Choose an item. |  |  |
| 1B | Integration with Navision accounting system as:  A) A one off to pick up the employee data at migration  B) To pick up the monthly data automatically | Choose an item. |  |  |
| 1C | Can you company do an Application Program Interface (API) to pick up the data from our 8 payrollers in 8 countries as:  A) A one off  B) To pick up the monthly data automatically |  |  |  |
| 1D | Fully GDPR compliant for all 8 countries | Choose an item. |  |  |
| 1E | Training will be required for those who work with the systems on a daily basis (Finance/HR in total 40 staff ) as well as the users of time writing and holiday requestors and approvers (Employees and Managers in total 266 staff) Please indicate how you will provide such training to these 2 groups as follows:   1. Remote or F2f Training of Finance and HR staff for the system, configuration of Time writing system and holiday system and hr system – 40 staff 2. Remote or F2f Training of users for time writing and holiday request system and approvers of time writing of holiday request system – 266 staff | Choose an item. |  |  |
| **SECTION 3**  **TImewriting, holiday/leave and sick leave system Requirements** | 3A | Flexible time writing possibilities:   1. Either per day, week, project, 2. Using different working hours per country (eg France 35 hours vs NL 38 hours).   Time writing per hour possible. | Choose an item. |  |  |
| 3B | Time control and country compliance rules that can be applied in time-writing including over-hours. 100% time writing possible. | Choose an item. |  |  |
| 3C | Time writing app for employees with a screen per employee that can be done in an app, on a phone on an iPad or a pc. Dedicated screen per employee and per manager where manager and employee can have a clear overview. Integration with email for approvals. Possibility to automatically approve for managers. | Choose an item. |  |  |
| 3D | Calculation of time written, and value of time written automatically integrating with payroll so we can bill customers and can report costs on projects according defined rules. | Choose an item. |  |  |
| 3E | Ability to collect times (clock In/clock out times or Timesheet) o ability to calculate total hours based on times collected, o ability to calculate premiums (night hours, working holidays, overtimes, etc) o ability to generate exceptions and alerts o Ability to create and maintain pay rules to calculate pay-codes for all type of employees (full-timers /part-timers) o Ability for employees to request time off rights, for managers to approve time off through approval workflow o Ability for managers to delegate authority o ability to perform retroactive edits on previous periods, | Choose an item. |  |  |
| 3F | Leave request that can be initiated by every employee online with a view of the balance taken and the balance left. | Choose an item. |  |  |
| 3G | Automatic approval of time or leave by managers after xx hour past. | Choose an item. |  |  |
| 3H | For the manager 1 screen to approve and reject employees in bulk, 2 approvers if required so if employee has 2 managers (matrix structure) | Choose an item. |  |  |
| 3I | Automatic approval or notification of manager integrated by email | Choose an item. |  |  |
| 3J | Automatic Calculation of leave balance and integration with payslips where leave balance needs to be printed on a monthly basis | Choose an item. |  |  |
| 3K | Keep track of over-hours and worked holidays, and payment implications | Choose an item. |  |  |
| 3L | Registration of illness and absenteeism in system | Choose an item. |  |  |
| 3M | Automatic flag to certain persons where over-hours are too many or holidays are too many. | Choose an item. |  |  |
| **4 HR SYSTEM** | 4A | A basic HR system that provides a headcount, basic personnel data (headcount per location, staff costs per location, cost per category of payroll data) that use the payroll data to automatically provide the required hr data on a monthly basis. Staff cost to be broken down into all cost categories and GL codes. | Choose an item. |  |  |
| 4B | An online repository where we can add performance management documents, employment agreements, contract letters to employees. Exit and hiring forms in repository. | Choose an item. |  |  |
| 4C | See per employee who has an indefinite contract who has definite contract, when the definite contract expires, auto notification to Hr and CCFO 3 months before expiry and 1 month before expiry. | Choose an item. |  |  |
|  | 4D | Provide an output file per country with the monthly mutations that we can send to the payroll providers to run the payroll. The idea is that we enter the monthly mutations FIRST in your system and then use the output file to provide the mutations to the 8 payrollers. Possibility to run monthly updates report for the payroll provider to prepare the payroll according local legislation |  |  |  |
|  | 4E | A Hr system that holds the data with 70 variables per employee as described in the excel sheet attached and allows flexible adjustment of additional local required variables. Please refer to attached excel example and let us know if all the data contained in the excel can be captured by your HR system. | Choose an item. |  |  |

By submitting this Annex 3 as part of the complete tender package, I hereby declare this form has been filled truthfully and the serviced marked as possible can and will be provided as part of the work scope within the offered price agreement.

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| **Free comment field for additional remarks or information from tenderer:** |
|  |

**Signature by tenderer representative**

Company name:

Representative name:

Representative function:

Date:

Signature:

ANNEX 4 COSTING TABLE TO BE COMPLETED BY TENDERING PARTIES

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Staff** | **Interns 6 months average per year** | **TOTAL** |
| **Numbers** | **265** | **68** | **333** |
| Installation/Migration cost | …..Euro | …..Euro | **…..Euro** |
| Annual cost | …..Euro | …..Euro | **…..Euro** |
| Installation cost for migration of data from Navision to your system as a one off | …..Euro | …..Euro | **…..Euro** |
| Configuration of a an API that picks up the Navision data on a monthly basis | …..Euro | …..Euro | **…..Euro** |
| Installation cost for migration of data from our 8 payrollers to your system as a one off | …..Euro | …..Euro | **…..Euro** |
| Configuration of a an API that picks up the data from the 8 payrollers on a monthly basis | …..Euro | …..Euro | **…..Euro** |
| Other costs | …..Euro | …..Euro | **…..Euro** |

By submitting this Annex 3 as part of the complete tender package, I hereby declare this form has been filled truthfully and the serviced marked as possible can and will be provided as part of the work scope within the offered price agreement.

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| **Free comment field for additional remarks or information from tenderer:** |
|  |

**Signature by tenderer representative**

Company name:

Representative name:

Representative function:

Date:

Signature: