



Features Brochure

A Flexible Way to Manage Your Workforce

When people processes get complicated, **Sage HCM** keeps you in control. It adapts to how your organization operates and delivers reliable payroll, clean data, empowered employees and predictable outcomes. Built to scale without the chaos.

Sage

 **EQUATION**
TECHNOLOGIES



Sage HCM has everything you need to manage your payroll and people processes, in one flexible platform. Sage HCM adapts to how your organization operates, so you can stop managing systems and start managing people.

Configurable, reliable, and ready for how your work flows.

Payroll

HR

Talent

Human Resources

- Advanced HRIS Functionality
- Comprehensive Benefits Administration
- Workforce Management
- Position Management
- Flexible Scheduling
- Centralized Document Management
- Robust Reporting & Data Access
- Self-Service Tools for Managers and Employees
- Configurable Features

Talent Engagement

- Streamlined Applicant Tracking and Recruitment
- Engaging and Immersive Onboarding Experiences
- Holistic Performance Management Solutions
- Strategic Compensation Management
- Succession Planning for Future Readiness
- Powerful Learning Management System

Payroll

- Robust and Flexible Payroll Batch Processing
- Payroll Validations & Corrections
- Union Payroll Reporting
- Accurate Time Capture Solutions
- Simplified Expense Reimbursement Management
- Support for Complex Payroll Calculations
- Versatile Employee Payment Processing Options
- Earned Wage Access for Employees
- Compliance with Multinational Tax Reporting
- Seamless General Ledger Integration
- Employee Self-Service Access
- Powerful Reporting

100%
REST APIs



Data
Encryption



POD
Architecture



Field Level
Security



Data
Segregation



Artificial
Intelligence



HR Functionality

Advanced HRIS Functionality

- Intuitive Drag-and-Drop Dashboard Creation
- User-Centric Analytics and Customizable KPIs
- Employment Information Mgmt.
- Effective Dating for All Employee Actions
- Detailed Profile and Personal Demographics Tracking
- Dependent Information Mgmt.
- Health, Welfare, and Workers' Compensation Tracking and Reporting
- E-Verify Support
- Integration with WOTC Services
- Dynamic Org Charts with Five Distinct Reporting Structures
- Role-Based Security Profiles for Enhanced Access Control

Comprehensive Benefits Administration

- Open Enrollment, New Hire Enrollment, and Life Event Mgmt.
- ACA Compliance Reporting
- Carrier Connectivity via EDI and Custom File Formats
- Effective-Dated Benefit Deductions Integrated with Payroll

Workforce Management

- Time Sheet Management
- Flexible Time Collection via Self-Service, Mobile App, Time Clock, and Kiosk Options
- Multi-Dimensional Time Capture with Up to 11 Dimensions
- Tracking Hours, Pieces, and Units
- Streamlined and Configurable Time Attestation and Approval Workflow Options
- Overtime, Comp Time, Break, and Shift Differential Calculations

- Automated Alerts for Overtime and Lunch Break Compliance
- ACA Compliance Reporting
- Robust Time Off and Leave Mgmt.
- FMLA and LOA Automation and Reporting

Position Management

- Flexible Employee Classification
- Easy to Use Support for Multiple Positions and Pay Rates
- Position Management Tools
- Position Control for Streamlined Workforce Planning
- Union Job Classifications and Rate Table Integration
- Budget Tracking and Analysis by Position

Flexible Scheduling

- User-Friendly Employee Scheduling Tools
- Shift Assignments Based on Job Requirements, Skills, and Certifications
- Shift Swapping with Automated Approval Workflows
- Employee Availability Tracking for Seamless Scheduling
- Mobile and Web Access to Employee Schedules

Centralized Document Management

- Customizable Forms Designer for Tailored Document Creation
- Secure Folder Access for Administrators, Managers, and Employees
- Comprehensive Reporting on Form Data and Surveys
- E-Signature Functionality
- Compliance Support with Federal and State Documents

Robust Reporting & Data Access

- Standard and Compliance Reporting Tools
- Ad Hoc Reporting with Drag-and-Drop Functionality
- Direct SQL Data Access for Advanced Analysis
- Scheduled Reporting for Automated Insights
- Reporting on Configurable Forms and Screen Data

Powerful Self Service

- Customizable Company and Department News Feeds Tailored to Employee Types
- Confidential Employee/Manager Feedback Reporting
- Surveys with NPS Scoring and Automated Alerts
- User Settings and Profiles
- AI-Powered Chatbot
- Enhanced Security with 2FA
- Multi-Language Support
- Dedicated iOS and Android Apps
- Manager Access to Team Talent Management Tools
- Manager Access to Time and Attendance

Configurable Features

- Configurable Fields, Forms, and Documents
- Customizable Screens for Client-Specific Needs
- Notifications via SMS, Email, and Mobile App
- Functions Like an In-House Application with Table Access
- Streamlined Workflow Mgmt.
- Single Sign-On (SSO) Support: Azure, Okta, Entra, Auth0, OpenAuth

Payroll

Robust and Flexible Payroll Batch Processing

- Analytics Dashboard
- Labor Distribution
- Support for Multiple Companies/Entities
- Multi-Country Support with Automatic Tax Updates (US, Canada, UK, Germany, and more)
- Flexible Pay Cycles within Each Company
- Multiple Pay Rates for Individuals in a Single Pay Cycle
- Support for Multiple Bank Accounts for Payments
- Employee Direct Deposit to Multiple Bank Accounts (Percentage or Fixed Amount)
- Unlimited Batch Processing (Including Same Pay Period and Month)
- On-Cycle and Off-Cycle Payroll Processing
- Unlimited Taxable and Non-Taxable Incomes with Effective Dating per Employee
- Unlimited Deductions with Effective Dating per Employee
- Process Hourly, Salaried, and Contractor Payments Together
- Special Pay Period Management
- Support for Special Tax Considerations
- Import Externally Calculated Incomes
- Import Externally Calculated Deductions
- Unlimited Gross-to-Net

Calculation/Recalculation

- Viewable and Editable Employee Pay Records
- Import External Incomes and Deductions
- Add or Remove Employees During Batch Creation
- Retroactive Pay, Bonuses, and Commissions
- Add Notes for Employees
- Customizable Batch Screen with Sorting and Filtering Options

Payroll Validations & Corrections

- Previous Pay Batch Comparison
- Retroactive Pay Calculations
- Export of Batch to Excel

Union Payroll Reporting

- Union Rule Configuration for Certified Payroll Rates
- Prevailing Wage Calculations
- Premium Pays
- Certified (WH-347) reporting - Davis-Bacon, Integration with LCP Tracker, Points North, and more

Accurate Time Capture Solutions

- Easily Load Approved Time Data from Criterion HCM Timesheets
- Direct Integration for 3rd Party ERP and Time Systems

Simplified Expense Reimbursement Management

- Employees Can Submit Expenses via Self-Service and Mobile, Including Receipt and Invoice Uploads
- Configurable Approval Workflow for Expense Submissions
- Approved Expenses Seamlessly Load into Payroll
- Expense Imports from 3rd Party Systems or Files

Support for Complex Payroll Calculations

- Gross up Pay
- Union Pay Calculations, Including Fringes and Deductions Based on CBAs
- Configurable Tax Treatment for Income and Deductions
- Support for Complex Income and Deduction Formulas

Versatile Employee Payment Processing Options

- Direct Deposit (ACH, EFT, BACS), Checks, and Pay Card
- Standard and Custom Check Stock Formats
- Ability to Change Payment Type During Pay Processing
- Employee Earned Wage Access through Clair
- ACH Integration with Kotapay
- Paycard Integration with FinTwist

Payroll (continued)



Compliance with Tax Reporting

- Multiple Options Tailored to Your Needs
- Standard Reports for In-House Filing
- Integrations for Comprehensive Full-Service Filing
- Assisted Tax Filing Support with Aatrix

Seamless General Ledger Integration

- API and CSV integrations with popular systems
- Built-in apps for Sage, Acumatica, Microsoft Dynamics, IFS, and many more

Employee Self-Service Access

- View Income and Deduction Details
- Update Tax Filing Status
- Access Pay History and Download Pay Period Statements
- Add or Edit Direct Deposit Information (Percentage, Fixed Amount, or Pay Period Selection)

Powerful Reporting

- Dashboard Reporting with Real-Time Analytics
- Standard and Compliance Reporting
- Ad Hoc Reporting with Drag-and-Drop Functionality
- SQL Data Access for Advanced Queries
- Scheduled Reporting for Automated Delivery
- Tax Reporting Options
- Compliance Reporting:
 - USA: W-2, W-3, 1095, 1096, 1099, 940/941
 - Canada: ROE, T4, T4A, RL1, CCQ
 - UK: P11D

Global HR and Payroll with partner integrations supporting payroll processing in 180 countries. Five of the largest countries are natively supported in Criterion, enabling 'all-in-one' payroll for even the most complex global HR, Payroll, and Talent requirements.

Talent Engagement

Applicant Tracking and Recruitment

- Recruitment and Application Analytics Dashboard with Reporting
- Seamless Job Posting Connectivity to External and Internal Job Boards
- Workflow Integration for Hiring Manager Collaboration
- Online Application Forms, Including E-Signature Support
- Customizable Question Sets with Assessments and “Knockout” Questions
- Interview Templates for Candidate Scoring and Note-Taking
- Job Requisition Forms with Integrated Workflow
- Position Management Tools
- Digital Parsing of Applications and Resumes for Candidate Data Collection
- Communication with Candidates via Email and Text
- Candidate Portal with Secure, Easy Login
- Offer Letter Templates and Generation
- Background Screening Through Trusted Partners
- Integration with Over 25,000 Job Boards

Engaging and Immersive Onboarding Experiences

- Intuitive New Hire Wizard Automatically Transfers Recruitment Data to Employee Records
- Engaging and Immersive Onboarding Experience
- Unlimited Customizable Onboarding Templates
- Approval Workflow for Trackable Onboarding Tasks
- Includes Forms, Documents,

E-Signatures, Learning Modules, Tasks, and Benefits Enrollment

- Onboarding Dashboards for Managers and Administrators
- Task Completion Alerts for Timely Follow-up

Holistic Performance Management Solutions

- Company and Employee Goal Setting
- Self, Manager, and Peer Employee Reviews
- 360-Degree Feedback Reviews
- Flexible Frequency Options for Reviews
- Customizable Rating Scales
- Unlimited Competency Tracking
- Unlimited Review Templates and Types
- Digital Storage of Review Records
- Digital Signature for Review Sign-Off

Strategic Compensation Management

- Unlimited Distribution Rounds
- Access Restricted by Security Profiles
- Recommended Pay Rates Aligned with Company Policy
- Option to Add Additional Employee or Position Data
- Date of Last Pay Raise
- Last Performance Review Rating
- Review Rating for Compensation Considerations
- Minimum, Maximum, and Compa-Ratio for Employee’s Position
- Merit and/or Bonus Distribution Management
- Budget Allocation for Compensation Distribution
- Workflow for Compensation

Approval Process

- Compensation Distribution to Payroll with Effective Date

Succession Planning for Future Readiness

- Tracks Readiness of Internal and External Successors
- Matches Skills and Competencies to Identify the Best Fit
- Identifies Optimal Replacement Candidates for Positions
- Assesses Flight Risk and Impact of Talent Loss
- Reporting on Best Fit Succession by Position
- Career Mapping and Development for Employees

Powerful Learning Management System

- Auto-Assign Courses Based on Employee Group
- Manager-Assigned Courses for Employees
- Employee Course Selection from a Comprehensive Course Catalog
- Supports SCORM and AICC Formats for E-Learning
- Compatible with Word, Excel, PowerPoint, Text, and PDF Formats
- Training Tracking for Upcoming, Past Due, by Course, Class, or Employee
- Detailed Reporting on Training Progress
- Certification Management: Uploading, Tracking, Expiration Alerts, and Recertification Process
- Unlimited Skills Library with Categories and Skill Levels
- Searchable Library to Identify Qualified Employees

Self-Service

Recruiting

- View Job Postings
- Candidate information/details
- Communicate internally with Recruiter(s)
- Conduct Interviews

On-Boarding

- View all outstanding personal tasks (both new hire & other employees)
- Due dates color coded for priority completion
- Complete assigned tasks
- Complete/Sign/Submit forms
- Update personal data –Address, Dependents, Banking details, etc.

Performance Reviews

- Complete Reviews
- View Review History - Both Personal & Direct Reports
- Maintain Journals - Both Personal & Direct Reports (maintain private journals)
- Feedback - Request & Receive
- Set/Update Goals – Company, Personal & Direct Reports

Learning Management

- View Courses/Classes Assigned
- Select new Courses/Classes from Course Catalog
- View Course History
- Instructor Access to Roster, Attendance, Grading

Expense Reporting

- Take a picture & upload receipts

Surveys

- eNPS
- Anonymous responses available

Calendars

- Upcoming Company Events
- Birthdays
- Training
- Time Off – Personal & Team

Additional capabilities

- Feedback - Named & Anonymous
- Engagement & New Feeds
- Configurable Fillable Screens
- Reusable Forms
- Company Documents Library
- Company Videos
- External Links



System Configuration

HR Administration

- ACA - 1094/1095 reports & transmission to IRS
- Benefits - Date Effective including new Rate Tables, Formula Driven Plan Qualification
- Carriers
- Company Events
- Delegations
- Employee Groups
- Holidays
- Jobs
- On & Off Boarding
- Open Enrollments - Multiple Enrollment capabilities, New Hire, Life Events
- Projects
- Salary Grades - Grades, Steps in Grade Ranges
- Screening
- Task Groups/Projects - Subprojects & Cost Codes
- Create Tasks, Assign to Employees to track time or auto-distribute based on %
- Time Offs - Unlimited Time Off Plans, Accrue, Block Issue, Carry Over (or not, or a limited amount and a limited time)
- Work Locations
- Work Periods – Standard Work Hours

Payroll Administration

- Bank Accounts
- Multiple Payroll Accounts for each Company
- Deduction Frequencies
- Deductions
- GL Account Mapping
- GL Integration w/Labor Distribution
- GL Accounts
- Incomes - Taxable or Non
- Pay Groups
- Payroll Schedules
- Shift Rates
- Tax Rates
- Time Clocks
- Timesheet Layouts
- Union Rate Tables
- Fringes and Deductions (Employee and Employer Contributions)
- Workers Compensation

Recruiting Administration

- E-Verify
- Job Publishing Sites
- Question Sets
- Recruiting Settings

Compensation Administration

- Compensation Rounds
- Merit increases and bonus allocations - \$ or %

General Administration

- Dashboards
- Documents
- Forms
- Self-Service Links
- Videos

Learning Management Administration

- Certifications - Track Expirations & Renewals
- Classes
- Courses
- Instructors
- Learning Paths
- Skills Library

Performance Management Administration

- Company Goals
- Rating Scales
- Competency Library
- Review Periods
- Review Templates

System Configuration (continued)



Employee Engagement Administration

- Badges
- Communities
- Confidential Reporting
- Survey's eNPS
- Survey eNPS Results
- Feedback
- Reports
- Screens

Task Scheduler

- Automate processes
- Reports – Standard, Custom & Ad-Hoc
- Auto add Benefits & Benefit Plan Calculations
- Certification Expiration & Overdue Notifications
- Time Off Accruals & Timesheet Alerts
- Employee/Course Scheduler
- Apps
- Carrier Connects

System Configuration

- API Keys
- Apps
- Calendar Policies
- Classification Codes
- Code Tables – Modify existing & create new Code Tables (drop down menu selections) including language
- Compensation Types – create new based on (non)cash, (non)taxable, (non)subject combinations
- Custom Fields and Formats
- Custom Localization
- Custom Reports
- Custom Screens
- Data Import
- Deduction Types
- Document Delivery – W2s, T4s, P11Ds, Paychecks from 3rd Party Payrolls
- Employers - Unlimited
- ESS Widgets
- External Systems
- Field Configuration – Audit any data field
- General Ledger
- Notifications & Layouts – Customize Message & Delivery – Email, SMS Text & ESS
- Overtime Rules
- Password Policies – Password complexity
- Payroll Settings
- Report Settings – Date, Time and Name formats
- Security Profiles
- Self-Service Help
- Support Access - Limit Client Support access by IP Address & Expiry Time
- Tax Engine
- Workflows

Technology & Security

Hosting

- Amazon Web Services (AWS)
- SOC II Compliant
- Public Cloud, Private Cloud, On-Premises
- Hosting facility is dictated by company location (US, Canada, UK)

Security Structures

- POD Architecture
- Limited number of clients/ POD
- Multi-Server Farms
- 100% Uptime
- Uptime Monitoring

Security Monitoring

- Amazon Inspector
- Amazon GuardDuty
- Amazon Macie

Access Monitoring

- All access to Criterion HCM is through RESTful API calls
- All calls are logged at Load Balancer
- Kibana is used to monitor access - Login Attempts, Error Logs
- AWS CloudWatch monitors all activities

Data Encryption

- All data encrypted at rest
- Login Password Hashing - HmacSHA512, Unique salt for each user
- Database Passwords encrypted - 256 bit AES, Tenant's encryption keys, 90 day key rotation

Disaster Recovery

- To the minute recovery for last 35 days, weekly beyond
- Servers & Infrastructure can be rebuilt in less than 4 hours
- AWS Aurora maintains copies of data in 3 availability zones
- Read only replica in a different region than primary
- All backups are encrypted
- Annual testing

Multi-Level Employee Security

- 2 Factor Authentication (2FA)
- Single Sign On (SSO) - Azure, Okta

Software Stack

- HTML 5
- 100% RESTful API
- Play Framework, Scala
- AWS Aurora, MySQL

Support Portal Access

- All Criterion Implementation & Support is accessed through the Support Portal
- Clients, optionally, can enable Support Portal Access to their designated support person and can, optionally set expiration time
- All access by Criterion personnel through the Support Portal is logged and available for client review
- Access to the Support Portal is restricted to whitelisted IP Addresses
- Criterion personnel are restricted access to being either within Criterion offices or VPN
- Any terminated Criterion personnel's access is removed immediately



About Equation Technologies

Equation Technologies provides business management solutions for mid-sized companies in the USA and Canada. We make carefully crafted recommendations from among the industry's best-performing ERP software, including Sage Intacct and Sage 300. We help you **reduce the risk in choosing and implementing solutions** by:

- Listening closely to your challenges and exactly how your business works.
- Developing processes that match your business, not requiring you to conform to a software system.
- Mapping out efficiencies using technology to improve operations without adding staff.

Our main goal is simple: have a clear understanding of our clients' goals. We believe the only way to sufficiently grasp that information is by listening first, and offering valuable advice later. We also know that one single approach is not right for all businesses. We leverage our team's vast education and business experiences across industries to focus on our clients' unique needs. We understand the importance of your business. We know when you call on us, time is of the essence and we value & respect your time.

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