



PeopleInc®
by P&A

People Inc. Action List

The Action List can be a vital tool for tracking critical HR Related dates such as:

- **Recruitment deadlines** – Vacancy Closing Dates, Interview Reminders
- **On boarding tasks** – End of Probation Dates, Reference Checking, Issue Contract Reminder, Notify IT to arrange equipment and system access.
- **Employee's eligibility to Work** – Visa Expiry, Residence Permit renewal, DBS renewals
- **Fleet Management** – Vehicle MOT's, Insurance Renewals, Service Bookings
- **Training and Development** – Next appraisal Date, Course Expiry Dates
- **Leaver Checklist** – Reminder to carryout Exit Interviews and Return of Company Equipment

What is the People Inc. Action List?

The People Inc. Action List is a standard feature that is designed to help you keep on top of those important tasks and events. Actions can be created manually by the user or automatically when a record is updated and all actions can be tracked and managed centrally with quick links back to the related record.

Main Features

- Centralised Action list
- Actions can be created/linked to any record (Employee, Training, Recruitment, Fleet etc.)
- Actions can be automatically created when creating/updating records
- Ad-hoc Actions can also be added manually.
- Custom Action List Triggers (for automated Actions)
- Categorise actions (reminders, historical note, to do, etc.)
- Target dates (enable you to create to-do lists)
- Create reports (daily to-do list; employee history)
- Quick Link button (to access related record)

Benefits

- Never forget a key date (from anywhere in the system).
- Display Actions by Type, Category, due date etc
- Todays or current actions can be displayed on log in.
- Quickly identify any overdue actions
- Delegate tasks (actions routed to the correct person automatically)
- Centralise records and monitor progress (records marked with a status)
- Set-and-forget (DBS checks, visa expiry, expiry of qualifications, etc.)
- Automate the on-boarding process (and other processes)



Used correctly, the Action List will help ensure you never miss any key dates again.



Let us help you configure and implement the Action List to make it a valuable tool for your organisation.

How we can help you get the most from the Action List?

There are a number of things we can do with the Action List to configure it to meet your requirements to ensure you are getting the most from it.

Action List Triggers

The NEW Action List Configuration Screen is where you can set up new action list triggers to meet your specific needs.

Todays Actions

We can configure People Inc. to show todays actions when you log in so you can see your HR tasks for the day .

Filtering Actions

As People Inc can generate actions from any screen you may find you wish to manage specific Action Lists. Additionally, you may wish to only view this weeks actions or overdue Actions.

There are a wide range of filters that come with People Inc. Additional Filters can be provided or configured to meet your needs.

Action List Reports

As with filters, People Inc. has a number of built in reports relating to the Action List. Top help you get more from the Action List we can create a wide range of new reports to help you manage your actions, for example Training Expiry Report, Overdue Actions, User Specific Action Lists and so on.

Manager Action List (ESS Users only)*

If you use the Employee Self Service (ESS) Module for People Inc. we can configure the system so that Managers can view actions relating to the employees in their team.

Action List Review

If you have been using People Inc. for a while you may find that Actions are already being created automatically as you update the system, say when you add a new employee.

If this is the case we can help you tidy the existing items in the Action make using the Action List more useful going forwards.

Contact Us

Contact us for more information about how you can use the People Inc. Action List to ensure you never miss a critical HR Related date again:

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agathon HR

