



SoHR

MICROSOFT 365

POLICIES, FORMS AND COMPLIANCE

S0365

LIMITLESS POSSIBILITIES



Unlock the power of Microsoft 365

Microsoft 365 is used by a huge number of businesses around the world every day, including 330,000 in the UK alone. It's the top choice for business apps, with a 90% share of the productivity suite market. But, despite its popularity, very few of those companies use it to its full potential. At So365, we're on a mission to share the limitless possibilities of Microsoft 365, helping businesses become more efficient, productive, secure, and profitable.

Transform your business with Microsoft 365



Centralised: Improved control and efficiency



Secure: Industry-leading cloud security



Compliant: Exceptional data privacy control and protection



Lifetime value: A future proof investment built to your requirements



Minimal risk: Reliable, accessible, always available



Engagement and productivity: Unrivalled employee experience

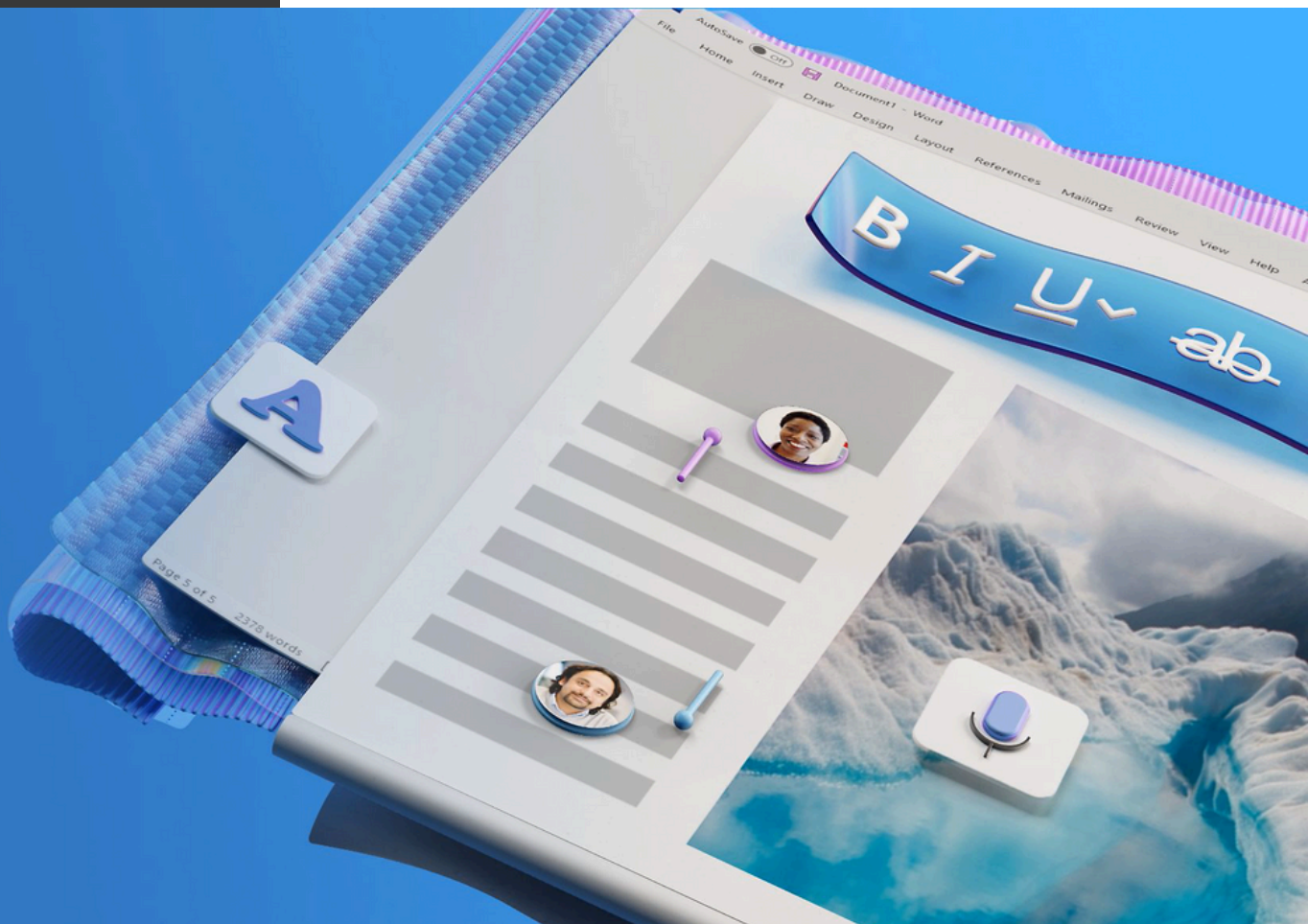
This guide covers just a few examples of how Microsoft 365 helps HR departments streamline policies, forms and compliance.

HR teams must create, update, and distribute policies and forms, such as the employee handbook and expense policy, to govern the organisation and its employees. They also monitor and enforce compliance with relevant regulations, such as employment laws and health and safety.



Microsoft Word

Microsoft Word allows HR teams to create and edit policy documents and forms using templates, styles, and formatting tools. Teams can collaborate and review documents using co-authoring, comments, and track changes. Word integrates with Microsoft Teams, SharePoint, and OneDrive for secure storage and sharing.



SharePoint

SharePoint is the main platform for managing HR policies and forms. It allows the creation and sharing of HR sites, libraries, and lists, with controlled access and permissions. Policies and forms can be tagged with metadata, such as owners and review dates, and organised with views and filters. Alerts can notify owners when policies are due for review.



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Documents > People Policies

Name	Status	Owner	Reviewer	Approver	Last Review Date	Next Review Date
Bullying and Harassment Policy.pdf	Approved	HR	Diego Siciliani	Nestor Wilke	01/02/2023	01/02/2024
Code of Conduct Policy.pdf	Pending Review	Corporate	Diego Siciliani	Nestor Wilke	01/02/2023	01/02/2024
Company Ethics Policy.pdf	Approved	Corporate	Miriam Graham	Nestor Wilke	03/07/2023	03/07/2024
Disciplinary and Dismissal Policy.pdf	Approved	HR	Diego Siciliani	Joni Sherman	01/02/2023	01/02/2024
Drug and Alcohol Policy.pdf	Pending Approval	HR	Diego Siciliani	Joni Sherman	01/02/2023	01/02/2024
Environmental Policy.pdf	Approved	Corporate	Miriam Graham	Patti Fernandez	01/02/2023	01/02/2024
Equal Opportunities Policy.pdf	Approved	HR	Diego Siciliani	Joni Sherman	01/02/2023	01/02/2024
Equal Pay Policy.pdf	Pending Review	HR	Diego Siciliani	Joni Sherman	03/07/2023	03/07/2024





Organisation Assets Library

The Organisation Assets Library is a SharePoint library for distributing standard HR templates and forms to employees. This ensures access to the latest versions in all Microsoft Office apps, promoting consistency and reducing the risk of using outdated versions.

Company Templates Public group ☆ Not following 👤 4 members

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Documents > SoHR

Name	Owner	Category	Modified
Expense Claim Form.dotx	Finance	Form	November 14, 2023
Holiday Request Form.dotx	HR	Form	November 14, 2023
<input checked="" type="checkbox"/> Overtime Request Form.dotx	HR	Form	November 14, 2023
Performance Improvement Plan Template.dotx	Learning and Development	Template	November 14, 2023
Right To Work Checklist.dotx	HR	Checklist	November 14, 2023
Standard Appraisal Form.dotx	HR	Form	November 14, 2023
Training Course Evaluation Form.dotx	Learning and Development	Form	November 14, 2023
Working Time Opt Out Agreement.dotx	HR	Template	November 14, 2023



Microsoft Forms

Microsoft Forms allows HR teams to create and share quizzes to test employee knowledge of policies and procedures. Responses can be exported for analysis with integrated Microsoft 365 apps and services, such as Power Automate, Power BI, and Excel.



Employee Health & Safety Quiz

You must answer all questions. Please make sure you read the questions and options carefully.

* Required

1. What are your personal responsibilities at work? *

Tick all that apply

- Report unsafe acts, defects, accidents and near misses
- Work with your manager to improve Health & Safety
- Comply with Health & Safety policy and training
- Raise Health & Safety concerns

2. Put the following in order if you spot a hazard which could cause an accident / potential injury to yourself or others, as to what you should do *

Can I deal with the hazard myself

Complete an accident (near miss) report form

Remove the hazard

Inform my Manager / Supervisor



Power Automate

Power Automate enables the creation and execution of automated HR processes, such as policy sign-off and document approval. With built-in templates or custom workflows, it can obtain attestations from employees confirming their understanding of HR policies.

Power Apps

Power Apps enables users to create custom apps, such as compliance dashboards and policy portals. With a low-code or no-code approach, HR teams can build and deploy apps that run on any device and platform.





All the benefits of Microsoft in one out-the-box HR Solution

SoHR leverages all the power of Microsoft 365 to create a fully customisable, out-the-box HR solution inside your Microsoft 365 environment.

The HR solution built for you in Microsoft 365



Designed with flexibility for your business

Unlike most HR systems, SoHR is fully customisable. It can be configured to meet your unique requirements, eliminating functionality that you don't need, and flexing and growing alongside your organisation.



Enhanced Employee Engagement

SoHR provides your employees with easy to use self-service tools and a modern compelling experience for accessing HR information, news and resources.



Fully integrated

To get the most out of your HR system, you need it to easily integrate with your other systems. SoHR is built within your Microsoft 365 environment meaning it integrates seamlessly with all your other Microsoft 365 apps.



Secure, private, accessible, and **owned by you**

HR systems should reduce risk, not increase it. Two of the biggest IT and operational risks to your organisation come from hosting your valuable and sensitive data with third parties, and from an over dependence on outside system providers who make it difficult to get your data back. With SoHR, your data will be stored securely in your Microsoft 365 environment - meaning you own the data, not a third party.



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