

# CRYSTAL BAY SOLUTIONS

## HR Management Software

### Architecture Overview

#### Employees

- Employee Details
- Applicant Processing:
  - Employment History
  - Applicant Interviews
  - Applicant References
- Emergency Contacts
- Leave Request Processing
- Timecards
- Employee Documents
- Visa Tracking
- Training Records
- Credential/Certification Tracking
- Performance Reviews
- Asset Assignments
- Performance Issues
- Injury Reports
- Exit Interviews
- Position & Salary History
- Position Requisitions
- Diversity Compliance Tracking
- Employee Questions/Issues
- Corporate Knowledgebase
- Onboarding and Retention Mgt.

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QuickBooks Integration

Outlook Integration

SMS Message Notifications

### Fundamentally Different

#### What does it do?

In a word - everything. The solution is designed to support virtually all your HR management requirements. If it doesn't have a function that you need we will add it.

#### What does it cost?

Very little, compared to the competition. Our one-time license fee is based on the size of your budget. Our goal is to provide HR managers with the most complete software representing the best value in the market. You also pay for an affordable subscription to the Quick Base<sup>®</sup> internet platform.

#### What hardware do I need?

A computer and a browser. That's it. The software is an online solution that is hosted by Quick Base, using their datacenters, security, and the Quick Base software platform.

#### Can I customize it?

Easily. Do it yourself or we can do it. Quick Base is a revolutionary platform that enables non-technical users to customize applications as easily as using spreadsheets.

#### I don't need all these functions.

That's OK. It's very simple to customize - we can easily delete, change or add modules.

#### Can I use my existing data?

Yes. We will convert it for you. We export from your existing system and import to the new system. Typically it's a fairly easy process.

#### What support do I need?

Not much. We believe that customers can be self-sufficient, to avoid expensive ongoing support costs. We will provide as much as you need, but the solution is designed so that you really can do it yourself. And it's easy.

*"We worked with Crystal Bay on a customized version of their HR application. The project was successful as it was delivered on time, on budget and the application works exactly as we had mapped out. Crystal Bay were great to deal with and were very patient and helpful. I would not hesitate to recommend them to other Quick Base users."*

*Mark Wilson  
EVP, Envision Sales Inc.*

### Quick Base<sup>®</sup> Software

Crystal Bay software applications are available online through the QuickBase development platform.

### QuickBooks<sup>®</sup> Integration

QuickBase applications can be integrated with QuickBooks so that you can move data seamlessly between the applications.



# Features, Benefits and Pricing

## Features

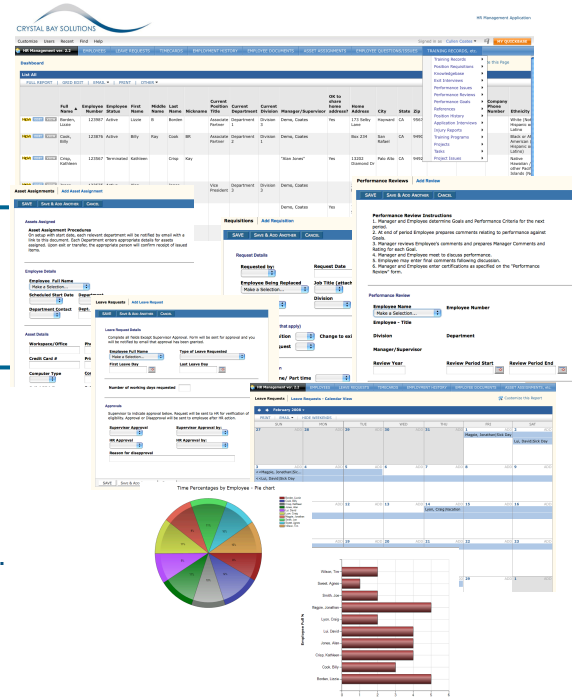
- Track employee information with custom categories and fields.
- Automate leave request approvals, processing and calendaring.
- Maintain a custom-categorized employee document library.
- Setup automated notices of visa, credential or certification renewals.
- Integrate applicant processing with permanent employee records.
- Manage employee issues and questions with automated reminders for resolution.
- Create automated follow-up processes for online performance review management.
- Develop complete checklists for employee entry and exit processing – track assigned assets, visa requirements etc.
- Includes project tracking for exception-based management.
- Establish an online, categorized reference library of all your digital documents, contracts, correspondence, and collateral.
- Circulate position requisitions and changes through a defined workflow approval process.
- Allow trained administrators to modify the system as your business needs change.
- Create seamless links to your QuickBooks payroll, accounting and other software.

## Strategic Benefits

- Comprehensive functionality.
- Simple customization.
- Low initial and ongoing cost.
- Trusted, safe and secure platform.
- Easy training.
- Simple data migration.
- Easy information sharing.
- Passes “due diligence” muster.
- Automated performance review management with notifications.
- Integrate employee performance goals with corporate strategic plan execution.
- Team collaboration system for managing workflow processes.
- Significant improvement in management and team productivity.

## Pricing

- A subscription to the Quick Base online platform at low “per/user” pricing. <http://quickbase.com>
- A one-time application license fee of \$3,750 plus \$50 per employee. (Discounts available for non-profit organizations and smaller companies.)
- Customization, data transfer, and a training and support allocation is provided under a separate, fixed-price, negotiated quotation.
- No required annual application maintenance or support fees.
- 4 Hours of free consulting included with Quick Base account trial activation pre-registration through Crystal Bay Solutions.



*“From a Human Resources perspective, the HR Management Application has all of the fields available to effectively enter and maintain information for our company. The ease of maneuvering around within the database is great, everything is there at a glance. I was surprised at how many additional fields are available i.e. performance issues tracking, injury reporting, adding relevant documents, etc. And I like that we can customize existing fields to suit our purposes.”*

*Karen Barattia  
Human Resources Manager  
Reliant Land Services*

## Functional Detail

### Employee Information

- Contact Details
- Addresses
- Demographic details
- Visa and Immigration details
- Anniversaries
- Emergency contact details
- Educational background
- Credentials and Certifications

### Timecards

- Link to project management
- Ad-hoc or specified tasks
- Specify billing status
- Link to employee billing rate
- Link to QuickBooks accounting

### Leave Requests

- Custom list of leave types
- Employee posts requests online
- Automated approval routing
- Calendar view of requests
- Graphical view of absences

### Applicant Processing

- Contact details
- Credentials and certifications
- Employment history
- Applicant interviews
- Applicant references
- Store application documents

### Visa Management

- Record current visa
- Automated reminders
- Store I-9 document copies
- Record I-9 document types
- Setup specialized visa needs

### Performance Reviews

- Employee Goals setup
- Online access by all parties
- Setup periodic reviews
- Relate goals to strategic plan
- Setup annual operational goals
- Set performance measures
- Automated review reminders
- Customize form to your needs

### Training Management

- Setup available programs
- Employees register online
- Assign instructors
- Record outside training
- Custom categories
- Facilities scheduling

### Document Libraries

- Maintain multiple libraries
- Set custom categories
- Maintain revisions history
- Document “checkout”
- Corporate Knowledgebase
- Policies and pPocedures online
- Disaster planning online

### Asset Tracking

- Track “assigned to” details
- Streamline entry and exit processing
- Improve asset loss prevention
- Automate employee entry/exit notices
- Obtain “certifications” for loss prevention
- Custom checklists for accuracy

### Onboarding and Retention Tracking

- Create custom “onboarding” programs
- Survey and follow-up reminders
- Survey results input and analysis
- Issue tacking and escalation

### Administrative Functions

- Injury reporting
- Employee online question posting
- Automated policy change notices
- Online policy and procedures library
- Detailed compliance reporting
- Integrate basic benefits admin.
- Diversity management
- Compliance reporting reminders
- Exit interviews
- Position requisitions and changes

### Credentials Management

- Setup required credentials
- Link to employee records
- Automate renewal reminders
- Detailed compliance reporting
- Create custom requirements

### Dept. Project Management

- Setup Projects and Tasks
- Create task assignments
- Reporting on progress
- Issue Tracking/Escalation
- Exception management

### Discussion Forums

- Forums include any groups
- Relate to projects or groups
- Online remote access
- Set ad-hoc discussions

### Add Ad-hoc databases

- Planned maintenance
- Custom project tracking
- Travel management
- Corporate FAQ's
- Disaster Management

### Unique features:

- Actively track all aspects of ongoing processes.
- Full customization, including automated alerts and workflows without programmers.
- Integrates with QuickBooks or other legacy systems.

## Technical Overview

### Workflow Support

Create seamless internal/external communication processes.

Move information and documents by notifications rather than email.

Focus meetings on “exceptions” and key targeted issues for the group.

Monitor bottlenecks within processes using color-coded reporting and automated, conditional reminders.

Subscribe to reports showing key management issues, required actions, process exceptions and milestones.

### Alert Manager

Generate alerts based on:

- field values,
- defined actions, and
- actions not being performed e.g. timesheet submission.

Provide personalized alert messages.

Set reminders on fields based on conditions met or not met.

Send conditional notifications via email, text message or voice.

### Security

User and group management.

Granular control with folder, file, field and document level permissions.

User profiles allow for the creation of access control lists.

### The Quick Base Platform

That's the best part!

Quick Base supports both Windows and Mac operating systems. All you need is an industry-standard web browser such as IE, Firefox or Safari. You can even access Quick Base applications with your iPhone browser or iPhone native app.

