Optinacious

A HIGH-LEVEL OVERVIEW OF OPTINACIOUS' POLICY MANAGEMENT SOLUTION

OUTLINE OF THE SERVICE

Goal:

Enable a business to expose various policies/documents/files to employees and track that the employees have attested that they have viewed the latest version of the files.

Key Attributes:

- A business admin can upload documents, and subsequent versions of those same documents
- Employees can be alerted that they need to attest that they have viewed a given version of a file.
- Track versions of documents and attestations of viewing by employees of each version
- Reporting by business admin on which employees have viewed which files
- Ability of business admins to send out spot alerts to employees to get them in compliance with corporate policies
- Hosted, multi-tenant architecture

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HOW CLIENTS WILL USE THIS TOOL

- You can use to help you track any document that you need your employees to review. The solution makes it very easy to track whether an employee has viewed a given document and gives that employee a quick way to attest their acknowledgement of having seen the document.
- This is a great tool for:
  - Tracking whether employees have read the employee handbook
  - Distributing important yearly documents like those for Healthcare, 401k, etc.
  - Making sure employees are aware of key policies

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FAQS ON HOW THE SERVICE WORKS

What type of information do you track?

For any document uploaded, we track and report on two things:

- Whether an employee has viewed a document
- Whether they have attested they have read the document

Then we give you the tools to report on these attributes. So you can know the exact date and time each employee took each of the above actions

What will employees be required to do?

When you load in employees, they automatically will receive a notification that they have been enrolled in the service. They will receive a unique link that they can use to register themselves quickly and easily.

Then for each document you send them, they will receive an email with a link to that document. Then they simply click on the document where they can read it online or save it. Then they will be asked to attest that they have read it. That's it. But they will have a history log of each document they have attested to reviewing.

Can I create versions of different documents?

Yes! Its very easy to upload a document and to subsequently upload versions. You can track which version an employee has accessed.

What kind of reporting is available?

We give you the ability to view different reports by employee, by document, or all activity in your company. Directly from within the reports you can also opt to send a viewing request to a given employee.

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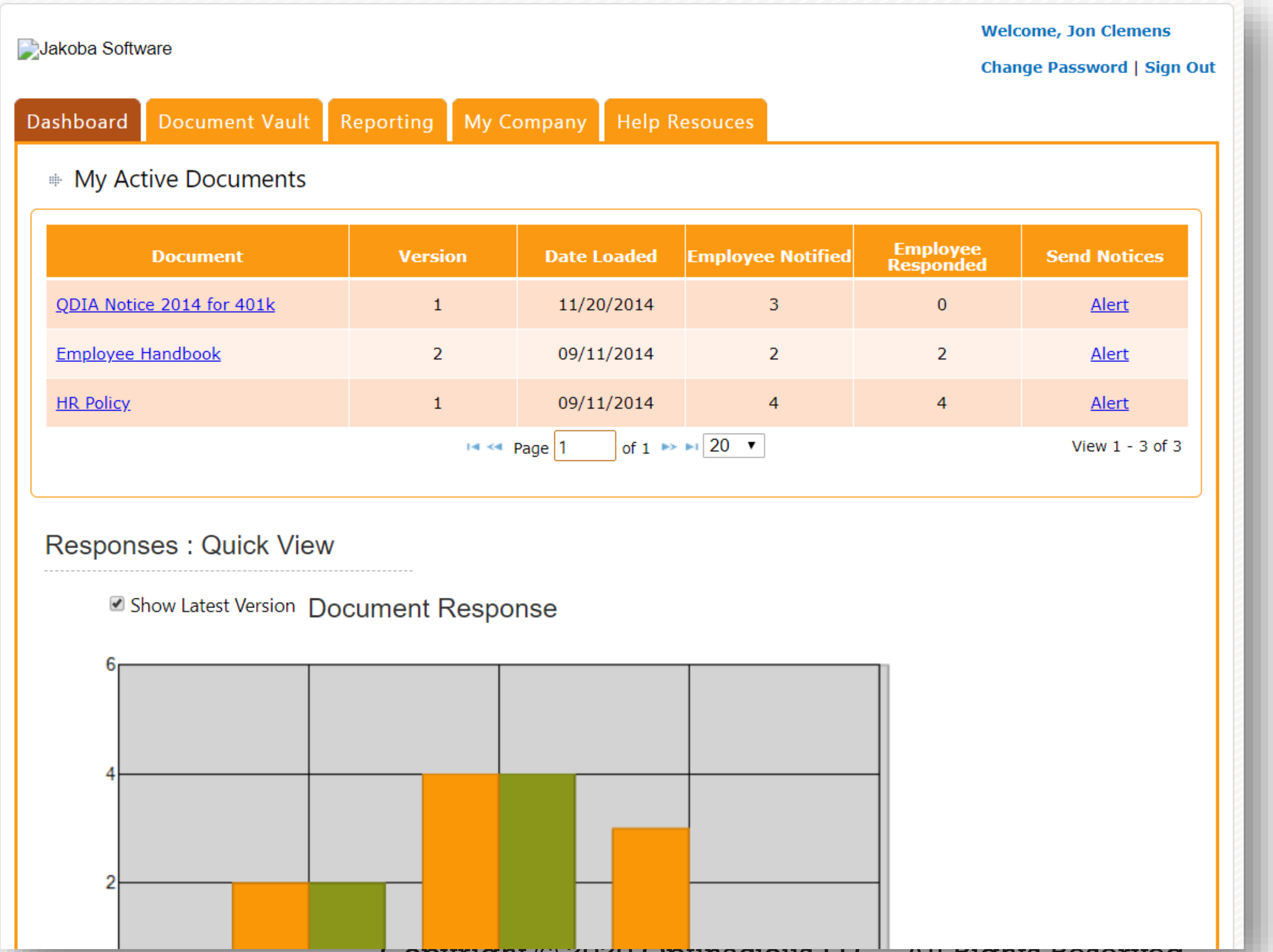
AN EASY TO USE, YET POWERFUL COMPLIANCE TOOL



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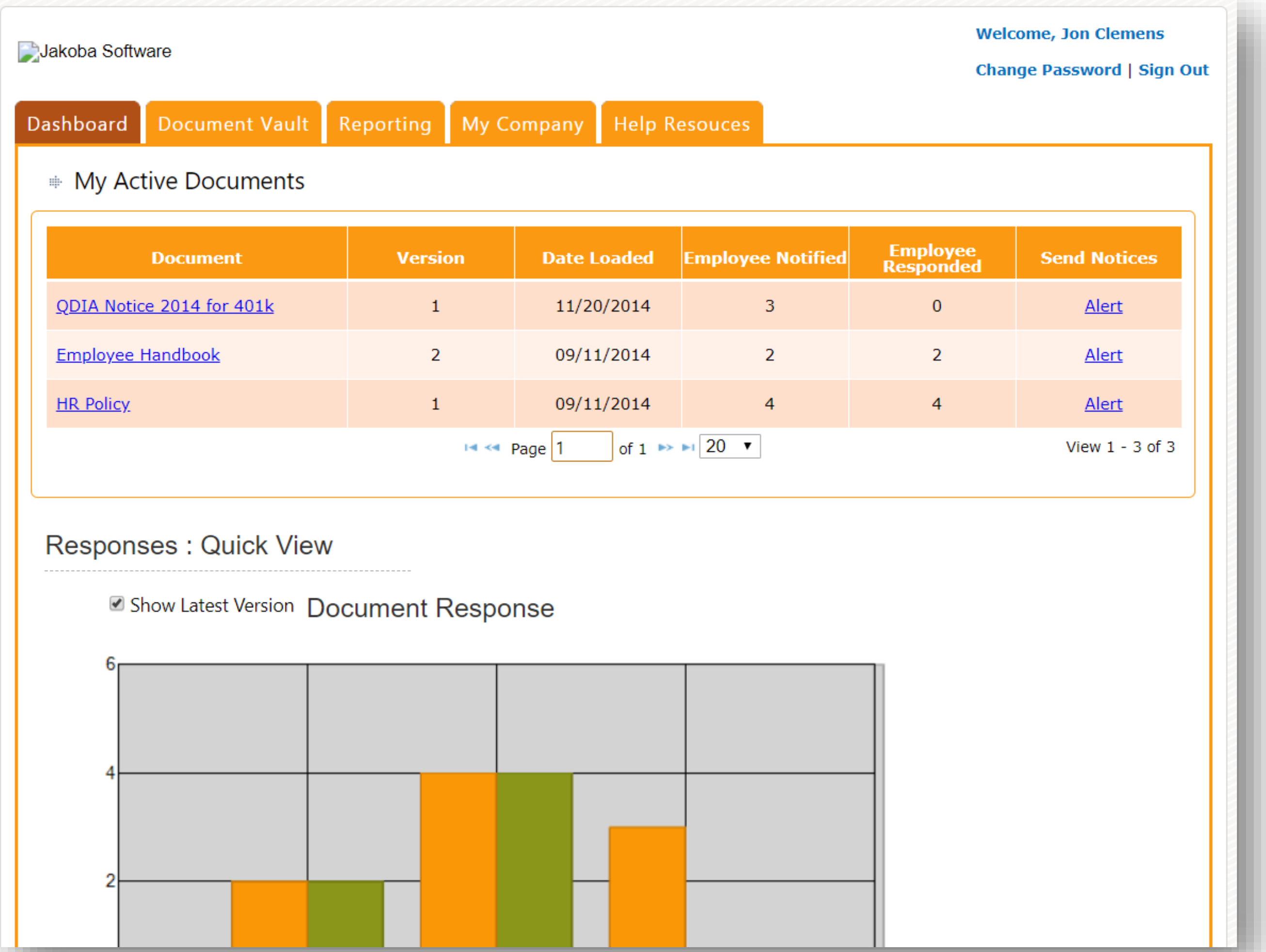
ADMIN FUNCTIONS

Admins are responsible for managing the site, adding employees, adding documents, and have access to reporting

ADMIN: DASHBOARD



Document	Version	Date Loaded	Employee Notified	Employee Responded	Send Notices
QDIA Notice 2014 for 401k	1	11/20/2014	3	0	Alert
Employee Handbook	2	09/11/2014	2	2	Alert
HR Policy	1	09/11/2014	4	4	Alert

The Dashboard gives the admin a quick view into

- Tracking which documents are in the system
- The overall compliance by employees of reading each document
- A quick means for sending out reminder emails

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ADMIN: DOCUMENT VAULT

Dashboard | Document Vault | Reporting | My Company | Help Resouces

My Documents

Home » Company Documents

	Status	Document	Version	Date Loaded	Employee Notified	Employee Responded	Send Notes	Edit	Delete
▸	Active	QDIA Notice 2014 for 401k	1	11/20/2014	3	0	Alert		✖
▸	Active	Employee Handbook	2	09/11/2014	2	2	Alert		✖
▸	Active	HR Policy	1	09/11/2014	4	4	Alert		✖

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Add New Document | Export to Excel

The Document Vault is where the admin can upload new documents or versions of existing ones.

- Gives a quick view on total employees notified about a given document, and how many have responded.
- Can also quickly send out new alerts to those who have not responded

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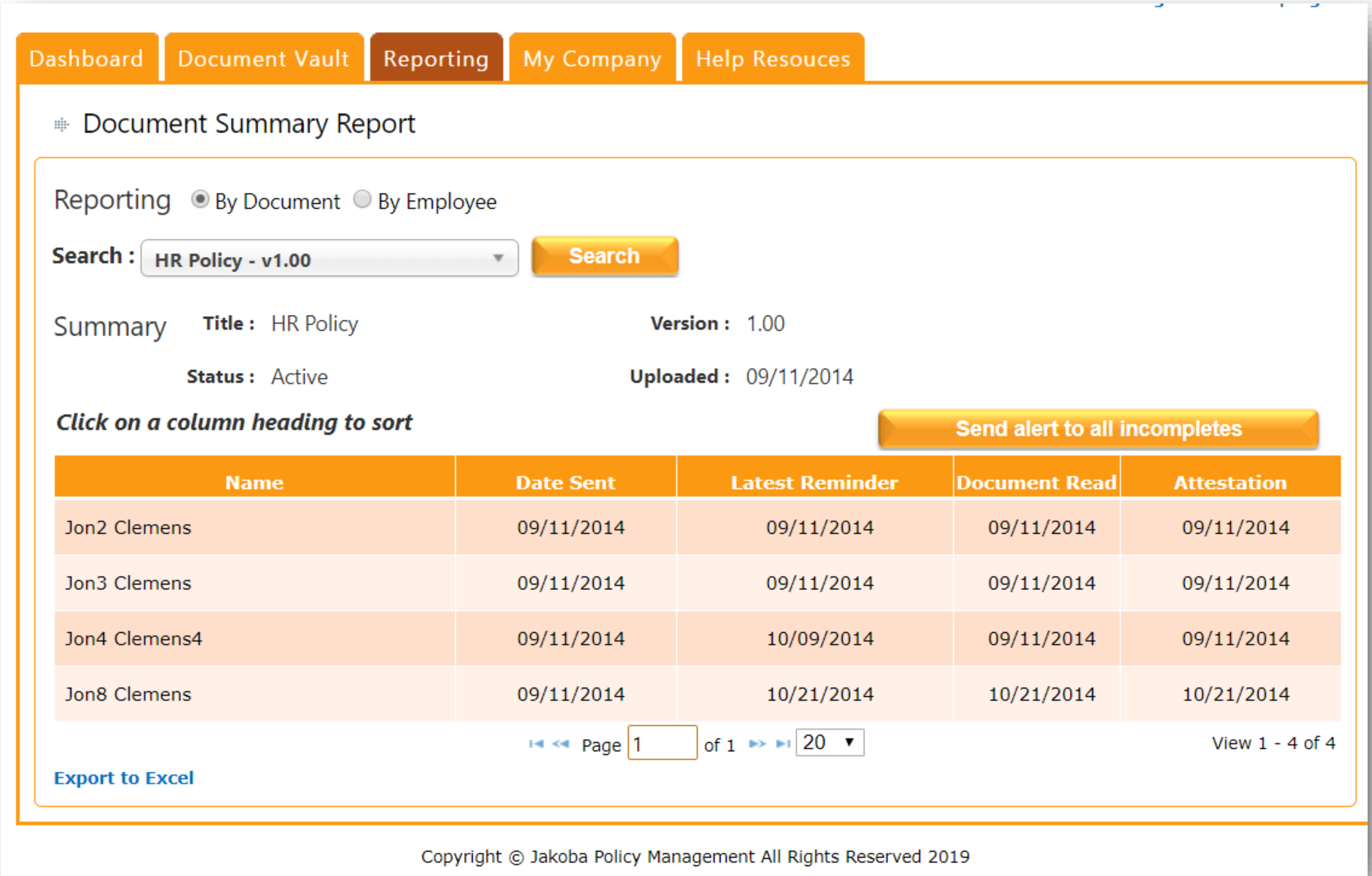
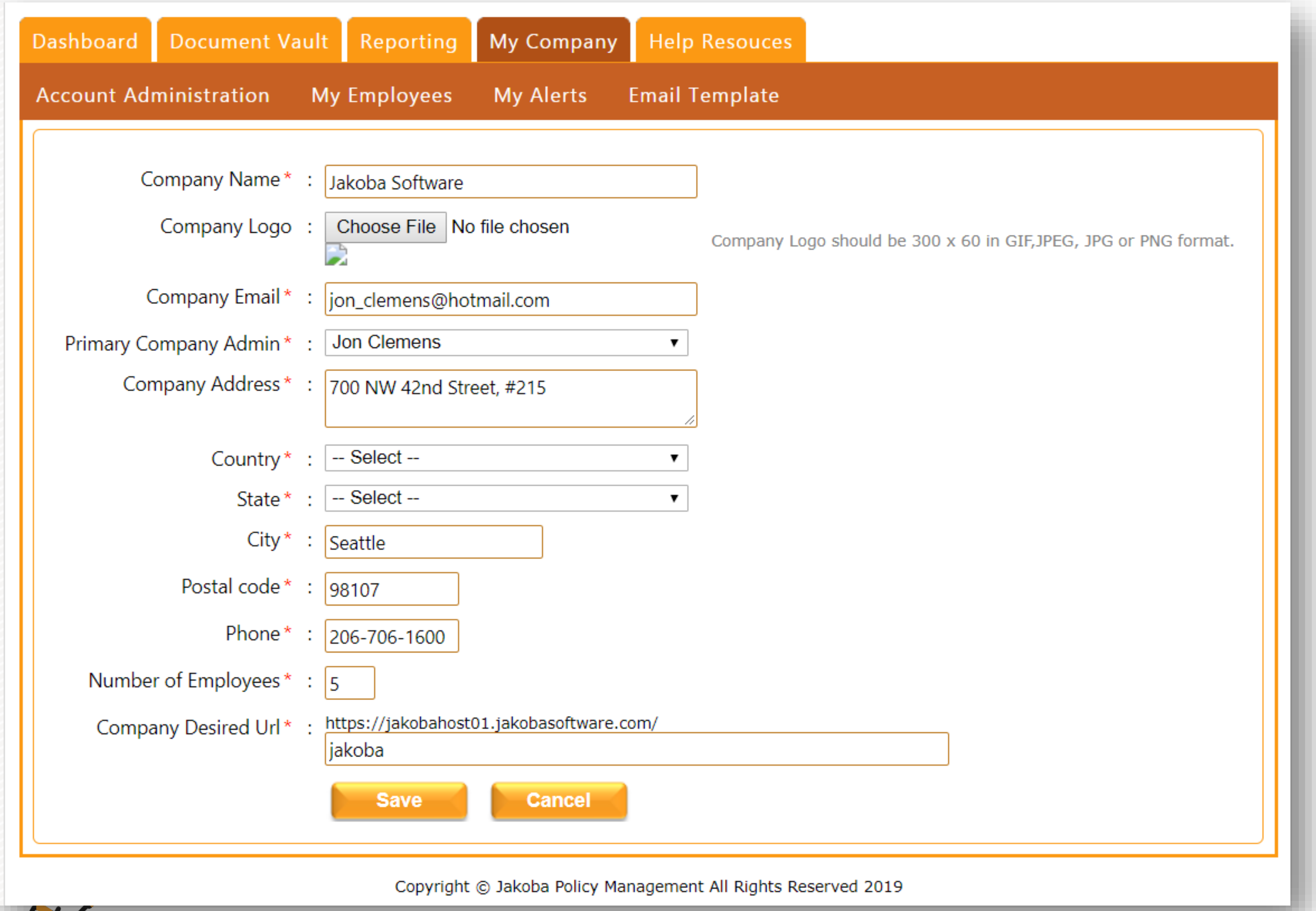
ADMIN: REPORTING



Easy to use reporting lets the admin:

- Quickly filter on the document they need to report on
- See which employees have actions outstanding, and gives dates for each activity by the employees
- Make the report actionable by allowing a quick message to be sent out for any incompletes
- Easily export to Excel

ADMIN: COMPANY MANAGEMENT


Dashboard | Document Vault | Reporting | My Company | Help Resouces

Account Administration | My Employees | My Alerts | Email Template

Company Name * : Jakoba Software

Company Logo : Choose File No file chosen

Company Logo should be 300 x 60 in GIF,JPEG, JPG or PNG format.

Company Email * : jon_clemens@hotmail.com

Primary Company Admin * : Jon Clemens

Company Address * : 700 NW 42nd Street, #215

Country * : -- Select --

State * : -- Select --

City * : Seattle

Postal code * : 98107

Phone * : 206-706-1600

Number of Employees * : 5

Company Desired Url * : https://jakobahost01.jakobasoftware.com/ jakoba

Save Cancel

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Admins can customize the solution by uploading logos, and specifying a vanity URL.

ADMIN: EMPLOYEE MANAGEMENT

Dashboard | Document Vault | Reporting | My Company | Help Resouces

My Company Employees

Home » My Company » Employees

	First Name	Last Name	Email	Office	Emp. No.	Resend Invite	View Notices	Role
	Jane	Rasmussen	janer@jakoba.com		14	Re-Invite	Alert	Employe
	Jon	Clemens	jon_clemens@hotmail.com		0			Admin
	Jon2	Clemens	jonc@jakoba.com		2	Re-Invite	Alert	Employe
	Jon3	Clemens	jonc@powertencompany.com		3	Re-Invite	Alert	Employe
	Jon4	Clemens4	v-joncle@microsoft.com		4	Re-Invite	Alert	Employe
	Jon8	Clemens	clemens_jon@yahoo.com		8	Re-Invite	Alert	Employe
	Keith	Martinez	Keithm@jakoba.com		0	Re-Invite	Alert	Employee

Page 1 of 1 20

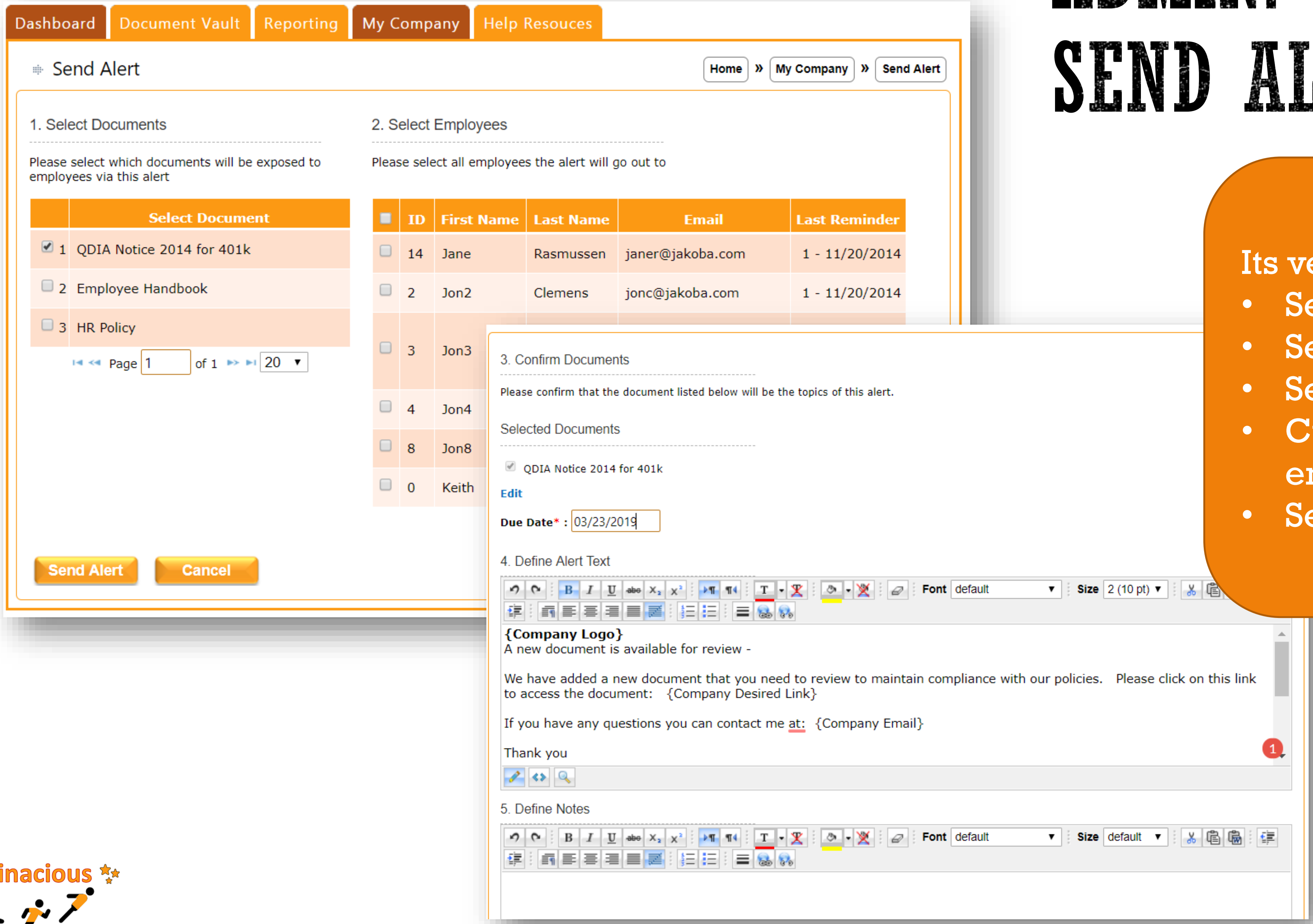
View 1 - 7 of 7

Add New Employee | Export Employee Data | Import More Employees (get importtemplate)

Admins can use this to:

- Individually add employees
- Import a full list of employees via Excel file
- Invite employees
- View reporting on an employee
- Set the role for any given employee

ADMIN: SEND ALERTS



Its very easy to send out alerts:

- Select the documents
- Select the employees
- Set the due date
- Customize the templatized email
- Send

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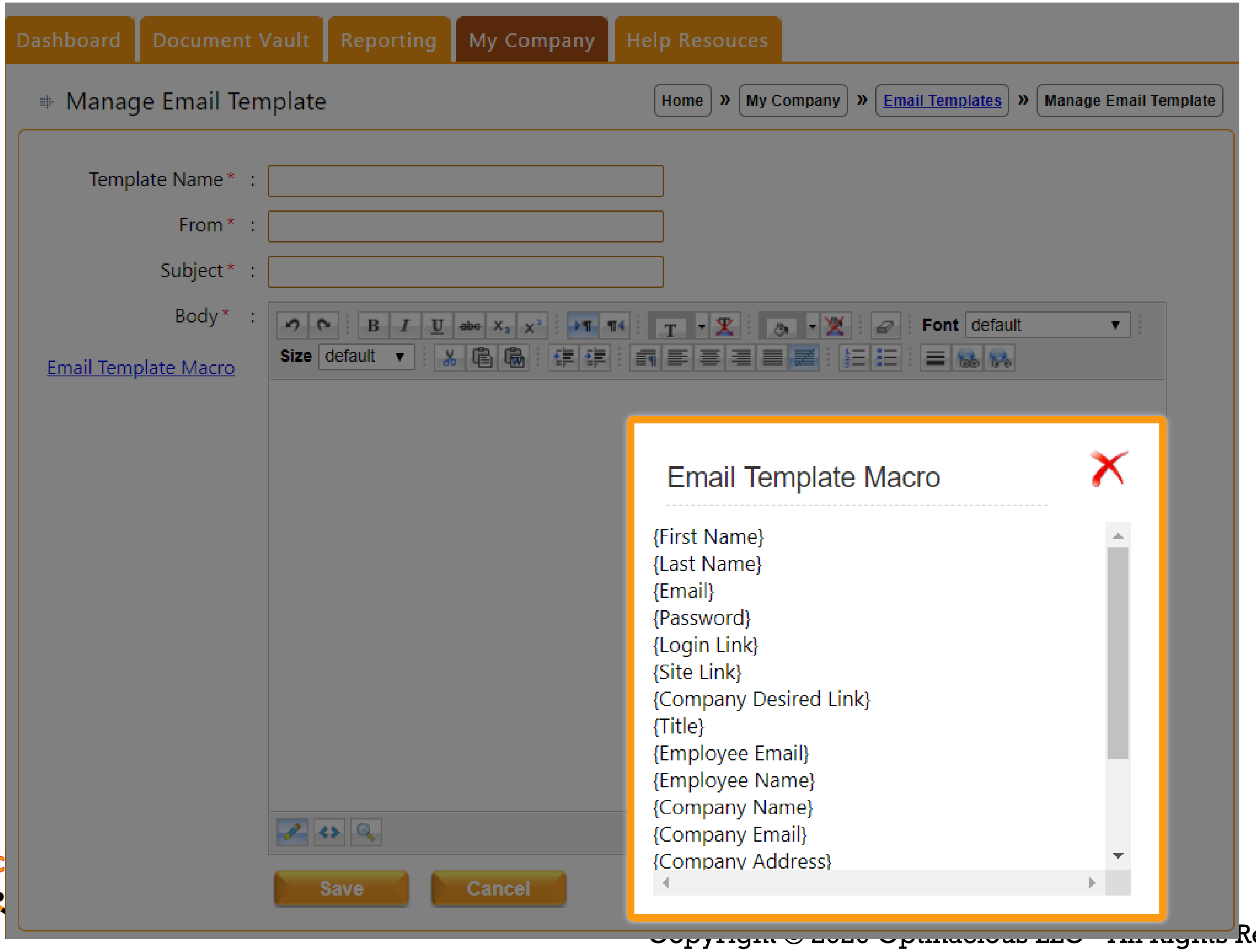
ADMIN: SETTING UP TEMPLATES



Built in tools make it easy to set up and define templates – including using special inserts to automatically pull in key data fields from the database

EMPLOYEE EXPERIENCE

EMPLOYEE VIEWS

Dashboard | History | Help Resouces

My Active Documents

Welcome to the Jakoba Software Corporate Policy Management Site.

Below you will find the documents you need to review. Please click on the title of each document listed and review it carefully. Once you have reviewed the document, please click on the Confirm link to attest that you have read the document. It is important to the company that you understand the contents of each of the documents below. As new versions of each document are uploaded, you will be asked to repeat your attestation.

Documents for your Review

Document	Version	Date Published	Date Of Alert	Due Date	Read	Confirmation
QDIA Notice 2014 for 401k						m

1 of 1

Document	Version	Date Published	Date of Alert	Due Date	Read
IT Policies	1.5	4/20/2012	1/13/2013	1/30/2013	✓

Attestation

I attest that I have carefully read the above document. By entering my name below I am notifying ABC Company that this document has been read by me and I am aware of its contents.

[ ] Bill Thomas

(Please enter your name in the box above, exactly as it appears at right)

Confirm I Have Read the Above Document

Employees will see a quick view of those documents they need to take action on. Clicking on the title opens up the document They then are asked to attest they have read the document

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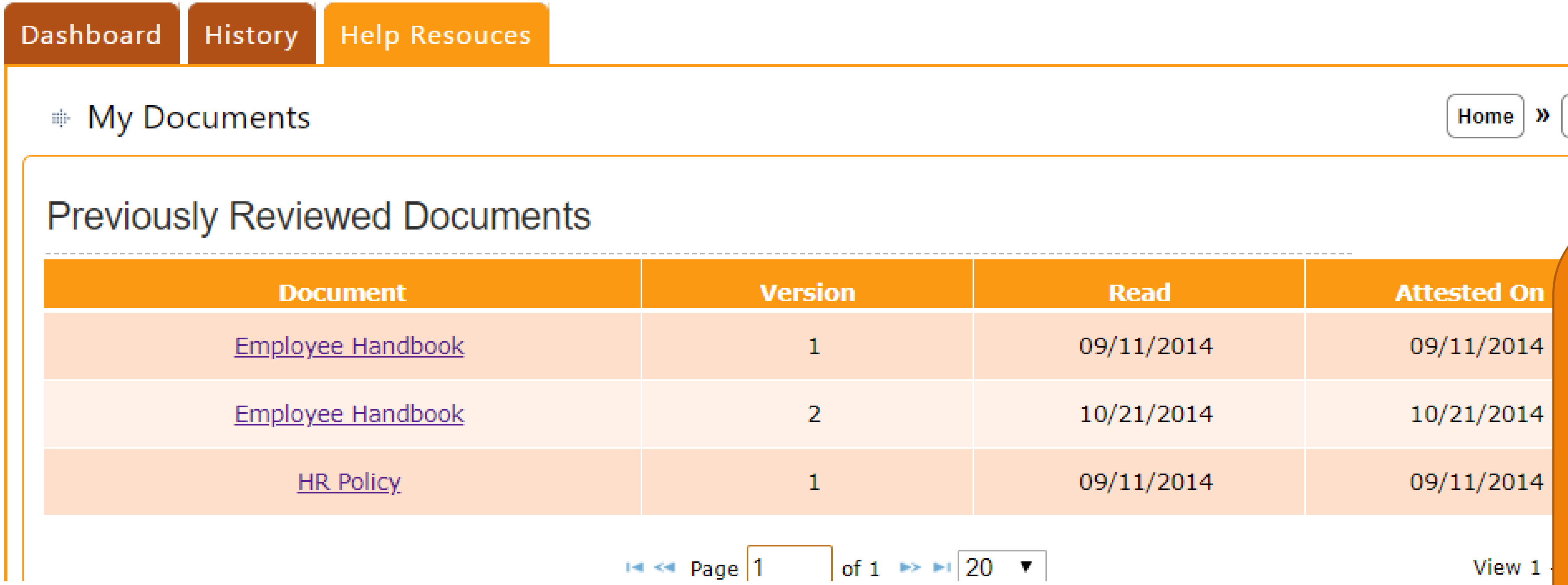
EMPLOYEE VIEWS - HISTORY



Document	Version	Read	Attested On
Employee Handbook	1	09/11/2014	09/11/2014
Employee Handbook	2	10/21/2014	10/21/2014
HR Policy	1	09/11/2014	09/11/2014

Employees can always see what they have attested to in the past, as well as get quick access to the documents again anytime.

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