The Company: Reliasourcing

- Reliasourcing is a Philippine-based BPO and we're on a mission to give you the peace of mind you need to run your day-to-day business.
- We specialize in tailor-made solutions that will help businesses offload and optimize some of their operational burdens and pain points while assuring quality and cost efficiency.
- Free your mind!
- Reliasourcing focuses on tailor making the solution for the client and acts as an OaaS (Operation as a service) to enhance performance and manage it. We believe an outsourcing partner should not only be a staffing solution, but an holistic and data-driven solution to maximize performance and promote efficiency.
- Operating in such a saturated market, it's hard to find a partner that is looking to scale and grow with a long term vision in mind. We want you to focus on your core business and let us free your mind of any other operational burdens, while assuring elevated operational effectiveness.
- Reliasourcing is located in Manila, Philippines. This premier outsourcing provider offers advantages such as a skilled workforce, English proficiency, young demographics comfortable with technology, familiarity with Western culture, and cost-effective solutions.
- Reliasourcing has a range of services to various industries, including Information Technology (IT), E-commerce, Financial Technology (Fintech), Accounting, Hospitality, Telecommunications, Healthcare, Retail, Media, and Utilities.
- Below are the outsourcing services offered by Reliasourcing:
  - Call center solutions
  - Staff leasing solutions
  - Seat leasing services
  - Virtual assistant outsourcing services
  - Workforce management outsourcing services
  - Outsourced managed services
  - Crowdsourcing solutions
- Reliasourcing offers unique advantages that can benefit your company.
- By working with this outsourcing firm, you gain access to a reliable onsite team that aligns with your company's culture and understands your business goals.
- It alleviates the stress of the hiring process as it takes care of everything from hiring and training to developing your sales agents.

- Reliasorcing is also highly committed to a true partnership with its clients. It acts as more than just an outsourcing company. Reliasourcing becomes your strategic partner, helping you grow and achieve your business goals.
- Its management team focuses on your success and does whatever it takes to support you.
- Innovation and insight are also integral to Reliasourcing. Its team of experts provides ongoing consultations to keep you updated on the latest developments and insights in customer care.
- This ensures that your team is equipped with the knowledge and skills necessary to deliver high-quality customer service.
- Reliasourcing is constantly searching for new opportunities and ideas to benefit your business.
- This organization helps increase your key performance indicators (KPIs), scale up your operations, and recommend additional support models based on your goals and objectives.
- Yoray Ofek (Managing Partner)
- Yoray Ofek's expertise lies in business management, solutions-driven strategies, and sales-oriented growth. He is the current president of the Israel Chamber of Commerce of the Philippines (ICCP).
- Yoray has spent nearly a decade forming strong connections in Southeast Asia and Israel by establishing his startups, investing in innovative enterprises, and extending his experience and knowledge to various businesses.
- Amir Borsok (Head of Business Development)
- Amir Borsok is an experienced professional in operations management, sales, and business development.
- Throughout his career, he has honed his skills in leadership, strategic planning, and relationship-building, enabling him to drive growth and efficiency for his company.
- Amir has a strong passion for identifying new opportunities and leveraging innovative solutions to achieve success, and he is excited to continue exploring new horizons.
- Website
- https://www.reliasourcing.com
- LinkedIn
- https://www.linkedin.com/company/reliasourcing/
- Facebook
- https://www.facebook.com/reliasourcingdd

Project: Reliasourcing Web Portal

The Reliasourcing Web Portal is an internal web-based system that handles data for day-to-day operations within Reliasourcing Inc. proposed by the company Operations Director, Ma'am Henie Langbayan. The project started development back in March 2024 under the management of Mr. Ryan Joseph Arellano, Full Stack Web Developer. After a month of development as a one-man team, two more developers joined the web development team, namely, Paul Kenneth Quinto (Full Stack Web Developer) and Rhezel Landicho (Front end Web Developer). And a month later, a Junior UI/UX developer joined, Jea Badinas.

The main goal of the web portal is to centralize data processes from day-to-day timekeeping logs of employees, performance trackers, critical data reports, content and material management and such processes that are vital within the company.

Development team:

- Ryan Joseph Arellano
- Jonathan Subion
- Paul Kenneth Quinto
- Rhezel Landicho
- Jean Badinas

System Modules:

- Home Dashboard
- Account Management
- Operations
- Reports
- Manpower
- Employee Directory
- Materials
- Forms
- Quality Assurance Management
- Content Management

Module Description:

1. Home Dashboard
   - Under Home Dashboard, users will have access to the portal banner, timekeeping panel, posts/events/announcements, list of holidays, and list of birthdays. The portal banner is an image carousel composed of images that are uploaded from the content management module. These images can be about employees receiving performance awards, event gatherings, top performers, and even announcements. Users can also access the timekeeping panel where they can time in, time out and change their shift status to something like Phone time and Ticketing. Under the posts/events/announcements panel, users can access the different events uploaded by the system administrators. Clicking these posts will reveal a modal with the post title, description, and attachments. These attachments can vary from document files, images/photos and videos. Users can also access the lists of birthday celebrants in a range of two months from the current month and Holidays for the whole year.

2. Account Management
   - Sub-modules: Onboarding Management, Offboarding Management, Campaign Management
   - In the Onboarding Management Sub-module, users with the appropriate access can onboard new employees by filling up the onboarding form and storing their employee information in the portal database. Information like full name, birthdate, address, hire date, position, campaign etc. are stored and are used for generating relevant reports. Users can also view the list of newly onboarded employees awaiting approval from the system administrator with the employee information for verification that can be edited for missing employee details like supervisor, designation, and roster. There is also a panel for viewing the summary of newly onboarded employees within a certain month and year. Users can also view the history panel containing the list of all onboarded employees under a campaign or month and year. When onboarding an employee or employees, users can choose to onboard in batch via uploading a spreadsheet file or through the onboarding form.
   - Under the Offboarding Management, users with the right access can offboard employees using the offboarding panel. To offboard an employee, a user selects their name and input a termination date along with the type of attrition (voluntary or involuntary), reason for offboarding, and additional information. Offboarded

employees that are not yet approved by an administrator will be viewable under the offboarding dashboard. When rejecting an offboarding request, a reason for declining is required. The list of all past offboarded employees are viewable under the history panel.

- In the Campaign Management, administrators can view the list of all campaigns under Reliasourcing with the number of rosters and employees under each campaign. Under the main campaign management dashboard, administrators can create new campaigns and designate the manager, photo/logo/banner, campaign name, and the designations available. By clicking on a listed campaign, users will be redirected to the campaign dashboard. Listed here are the different active rosters currently operating under the campaign. Administrators can create new rosters with the team leader and its members as well as the unique roster name. Administrators can also update the campaign information, like the manager and designations, by clicking the ”Campaign Info” button. By clicking one roster listed, administrators can view the members inside a roster and can also update the roster information. Because the movement of members are required to be tracked, roster history is saved in the database. Each Roster contains information about the line of business, team leader, and members’ status. Administrators can also update the billables under the campaign dashboard by clicking the “Edit Billable” button. In the billables panel, designations are set with the number of billables a campaign can have at a given period of time. Administrators can download these billables.

3. Operations
    - Sub-modules: Approval Center, Shift Status Monitoring, Schedule management, Threshold Management, Scorecard management
    - Under Approval Center, Administrators can view requests from employees such as Attendance Disputes, Overtime Applications, and Leave Applications. Administrators can choose to reject or approve these requests upon verification. Administrators can also view and download the history of all these applications filtered by employee campaign, roster, status, and date of filing.
    - In the shift Status Monitoring Sub-module, users with access can monitor real-time shift status of employees that are currently logged in in the web portal. Users are filtered by their roles, either agent or non-agent. In the status panel are the counts of users in a certain shift status (Ex. Lunch Break). The information monitored are the employee campaign, employee full name, current shift status, their expected status, status start time, duration and the threshold color for

whether they exceed the expected duration they have to spend in a shift status. Administrators can also force a user to be timed out if they exceeded their expected shift status.

- Under the Schedule management are five panels: Main Dashboard, Schedules, Workhours, LILO (Log in Log out), and Overtime. In the Main dashboard, the weekly attendance rate of employees is displayed. Administrators can view the actual and expected weekly workhours of each employee in each campaign, roster, and LOB (Line of Business). In the schedules panel, administrators can set and delete employee schedules for each day of a selected month. There are features like copy and paste and bulk update. Under the workhour panel, administrators can view each employee's workhour, with a maximum of eight hours, for each day of a month that are set with a schedule. While in the LILO panel, employees' actual time in and time out are displayed for each day regardless of schedules set. Lastly under the Overtime panel, employees' overtime duration for a day are displayed. All of the data displayed in each panel are downloadable as a spreadsheet.
- Under the Threshold Management, administrators can set the threshold to be followed by employees in their timekeeping for each shift status that are operational.
- Under the Scorecard Sub-module, administrators can monitor employees' performance scores using performance metrics that are set in the Manage Metrics panel. In this Manage Metrics Panel, an administrator can set a scorecard for each roster for a specified month and year. Key Performance Indicators can be created the create metrics panel and be used in a scorecard. A scorecard is a set of goals that agents are expected to achieve to earn points that are used to select the top performers for the month. Back at the main scorecard page, campaigns are listed and each one leads to their respective campaign score dashboards. In each of these score dashboards, top performing rosters and employees are listed with each total performance metric displayed at the top main panel. Clicking a roster row leads to the roster score dashboard. In this roster score dashboard, users with access can upload roster scores for each metric for a given day. Each metric score for each member in the roster are broken down by goal, actual, percentage, and points accumulated.

4. Reports
    - Sub-modules: Attendance Reports, Attendance Overview, Adherence Reports, Productivity Reports and Manpower Billable Report

- Under the Attendance Reports, users can view the Attendance Summary dashboard where each campaign attendance rate percentage is displayed with the breakdown for each roster attendance rate. Users can also choose to see the breakdown for the attendance rate based on expected workhour, rendered workhour, absences, lates, overtime, undertime, and leaves. Clicking on a campaign leads to the campaign attendance summary dashboard with the main panel displaying the campaign attendance rate breakdown and percentage. Under the main panel is the breakdown for each roster and members' individual attendance breakdown and percentage. Each member's daily attendance breakdown is viewable in a modal when a user clicks on an employee row.
- The Attendance Report Summary is mostly similar to the Attendance Report Sub-module with the difference that it displays data without the different dashboards and additional breakdown fields.
- In the adherence report summary, employees' adherence to their set schedules are displayed. Adherence is computed by comparing an employee's schedule set for a shift status and their actual shift status at the given time. The mismatches in these two are added up and presented as percentage for each employee and their respective rosters and campaigns as well as the total for the whole Reliasourcing workforce.
- For The Productivity reports, the workhour computed only comes from productive shift status that each employee tags themselves. These can include phone time, lunch break, ticketing and other productive tasks. Only the total workhour is used and compared to a set time of seven and a half hours to compute a percentage.
- The Manpower Billable report sub-module is the displaying of billables for each designation in each campaign for a period. In each row, the number of active employees, billables, buffer, billing start period and billing end period is displayed for each designation in each campaign.

5. Manpower
   - Under the Manpower Dashboard, administrators can view the entire Reliasourcing manpower report. This is the statistical display of data with graphs and charts. Administrators can also view the Attrition or movement of employees in and out of the company as well as between campaigns and designations. They can choose to view data yearly from one selected year to another year or by monthly breakdown. Each row breaks down to the starting

headcount, joined employees, terminated employees, monthly headcount, average employees and the attrition rate.

6. Employee Directory
   - The Employee Directory module renders data for all employees that are active/inactive within Reliasourcing. Employee data can be filtered by company branch/office, campaign, roster, active status, designation, contract type, and system role. Clicking an employee row opens up a modal where administrators can update user data.

7. Materials
   - Under Materials Module, users can upload files like documents, images, power point presentations, and spreadsheets. Files can be stored by campaign folders or by custom folders that are accessible by anyone with access to them. Supported files include spreadsheets (xlsx, csv), images (png/jpeg/jpg/svg), and documents (doc, docx, pdf, pptx, odt). Users can download and delete files as well as create new folders.

8. Forms
   - Sub-modules: Form Archive and Form Management
   - The Form Archive sub-module contains the different forms and their responses that are created within the web portal. Administrators can check responses and can also view the report for each form.
   - Under Form Management, administrators can create new forms using the form builder. In using the form builder, users can drag and drop dynamic components into the canvas. They can assign questions and toggle options that control how each component will behave. Users can also set different form settings to control the visibility of each form and even the appearance of each form (background color, font style, font color, font size). These forms can also be edited by the administrators on the condition that these forms have no responses. They can also choose to delete forms. When viewing the responses, administrators can view them in tabular and statistical view. The tabular rendering displays the answer of each employee for each question. The statistical view displays the number of responses each employee gave to each

question in graphs or charts and the overall number of respondents, responses, questions of a form. The data rendered are downloadable as a spreadsheet.
- In filling up a form, users can access one via a form link that administrators can send or share to them.

9. Quality Assurance Management
    - Sub-modules: QA Workspace, QA Evaluation Form Management, QA Configurations
    - The QA Workspace displays all the performance, audit compliance, passing rate, and policy failures of employees that are rated by quality assurance officers within Reliasourcing. Percentage ratings for each criterion being computed for each campaign and line-of-business (LOB) are displayed in weekly format and month-to-date. Clicking a Campaign row redirects users to the Campaign Dashboard under the QA Workspace. Each campaign gets its own overall rating panel and a roster breakdown within the campaign. It also reveals the Consolidated panel where ratings are displayed for each employee that are evaluated under one QA form. Under the valuations panel, all evaluations under a period are listed in descending order based on the audit date. Each row displays the overall score, employee name, auditor name, campaign, ZTP score etc. of each evaluation. These evaluations can be downloaded as a spreadsheet. Evaluations can also be disputed by agents and team leaders and these disputes are listed under the disputes panel. Evaluations with dispute/s are rendered in rows under the disputes panel. Each row shows the dispute status of an evaluation and if an evaluation gets acknowledged or modified, the dispute will no longer be rendered here.
    - Quality Assurance officers can evaluate agents by clicking the “Evaluate” button. This redirects them to the evaluation form where they can rate agents based on a list of parameters that they are expected to pass.
    - In the Quality Form Management are where evaluation forms are listed. Administrators can create these forms and specify which parameters they are going to use for rating agents based on their line-of-business and campaign. Administrators can also choose to delete these forms to avoid filling up the list with unused forms. Each form row contains the form name, campaign, creation date and who created the evaluation form.
    - The Quality Assurance Configurations is where administrators can create QA Buckets and assign employees to who will be evaluating them as well as set performance targets and target audit count for those buckets. Each QA Bucket is

assigned a Quality Assurance Officer, a Bucket name and employees the officer will be evaluating. In setting targets for a bucket, administrator can choose from the campaigns and line-of-business of the rosters within those campaigns. They can also set the audit compliance target which is the target for the number of evaluations that officers are expected to submit. Administrators can update these targets accordingly.

10. Content Management
    - Sub-modules: Banners, Posts
    - In the Content Management Module, users can create events and announcements and replace the images displayed in the home dashboard carousel.
    - Under the Banner panel, users can upload, delete, and arrange images. These images are the ones that are rendered in the home dashboard carousel. The order of their arrangement is how they will be rendered and rotated in the carousel.
    - Under the Post Panel, users with access can create new posts/events/announcements and edit the visibility of each of them. Each Post is rendered using a thumbnail, a title, an optional author, and the date. To create a post, users can click the “Create” button and will be redirected to the post builder. Users can set the banner, title, content, date and time, optional location, attachments, target audience and other options depending on the scope and likes of the author. These posts will be rendered in the home dashboard depending on the audience and end date.